

HAWAI'I TOURISM STRATEGIC PLAN

2005-2015

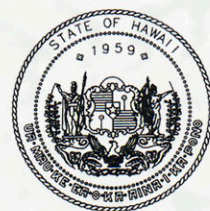


TABLE OF CONTENTS

INTRODUCTION 1

TOURISM IN HAWAII 3

VISION 6

GUIDING PRINCIPLES AND VALUES 7

IMPLEMENTATION FRAMEWORK 8

MEASURES OF SUCCESS 10

STRATEGIC DIRECTIONS 13

- Access 14
- Communications and Outreach 21
- Hawaiian Culture..... 25
- Marketing 30
- Natural Resources..... 36
- Research and Planning..... 41
- Safety and Security..... 45
- Tourism Product Development 49
- Workforce Development..... 55

APPENDIX

- APPENDIX A:** Listing of Major Stakeholder Partners
- APPENDIX B:** Summary of Island Focus Group Meetings (March - April 2004)
- APPENDIX C:** Listing of Research, Studies, and Other References

INTRODUCTION

1991 State Tourism Functional Plan

In 1978, the Hawaii State Planning Act, Chapter 226, Hawaii Revised Statutes, was enacted in an effort to ensure that a comprehensive long-range plan be developed to guide Hawai'i's future. The act established State goals, objectives and policies, and a Statewide Planning System to carry them out. This planning system required that the various State agencies develop a State Functional Plan to guide the implementation of State programs in their respective areas (e.g., health, education, tourism), and for use in conjunction with the County General Plans (which guided the implementation of county actions). In 1991, the *State Tourism Functional Plan* was produced which provided overall direction to the affected State agencies to address statewide tourism issues. It also served as a guide for the allocation of State resources to carry out various tourism efforts in conjunction with the counties.

1999 Ke Kumu

In 1999, the newly created State tourism agency, the Hawaii Tourism Authority (HTA), drafted its first tourism strategic plan, *Ke Kumu: Strategic Directions for Hawaii's Visitor Industry (Ke Kumu)*. *Ke Kumu* was to provide direction for the HTA and the industry, as well as to strengthen tourism for the benefit of Hawai'i's communities. The plan was based on two foundation studies:

- a competitive analysis describing the trends and competition Hawai'i faces throughout the world, titled *Competitive Strategic Assessment of Hawaii Tourism*; and
- a product assessment describing both the reality and perceptions of what Hawai'i provides the visitors, titled *Hawaii Tourism Product Assessment*.

This plan provided a policy directive towards "sustainable tourism" by focusing on growing spending instead of measuring tourism's success by tracking arrivals. It also divided the world into geographic segments (Major Market Areas) to direct efforts and resources to those areas with the greatest potential for success. *Ke Kumu* was shared with Hawai'i's communities in a series of statewide meetings to corroborate the overall strategic direction in which the HTA and tourism should be headed.

2002 Ke Kumu

In 2001, the HTA began to revise *Ke Kumu* by gathering additional data, assessing the effectiveness of the 1999 initiatives and holding additional public meetings for further input. The resulting *2002 Ke Kumu* was a revision of the 1999 plan that reflected public input, the impact of global events such as the September 11, 2001 terrorist attacks, and more details on HTA's specific efforts within each initiative. The *2002 Ke Kumu* was approved by the HTA Board of Directors on January 30, 2002 and has since guided the HTA in the development of its programs and the allocation of its resources.

Hawai'i Tourism Strategic Plan: 2005 - 2015

In 2003, the HTA began revising the *2002 Ke Kumu*. This process included an update of the foundation studies that examined Hawai'i's competitive position; a review of other research including the *2004 Sustainable Tourism in Hawaii Study*; the gathering of comments, suggestions and concerns from the community and industry through numerous outreach efforts including the Governor's Tourism Summit, focus group and public information meetings on all islands (see Appendix B), industry discussions, and on-line and email venues; and an assessment of the changes happening globally, locally and within Hawai'i's own visitor industry.

During this process, it became clear that in addition to *Ke Kumu*, a more comprehensive and inclusive plan that addressed the needs as well as identified the responsibilities of all Hawai'i's visitor industry stakeholders was needed. The result is this *Hawai'i Tourism Strategic Plan: 2005 - 2015 (TSP)* which identifies a shared vision for Hawai'i tourism in the year 2015 by Hawai'i's tourism stakeholders. It also provides a roadmap – strategic directions, specific goals and responsible and supporting partners – for achieving that vision. The *TSP* should not be viewed as an action plan for any one government agency, community organization or industry group.

In addition to this 10-year plan, the HTA, as the State tourism agency, will update its own plan - *Ke Kumu* – to identify specific action and implementation strategies consistent with the framework of the *TSP*. Furthermore, understanding that a successful tourism industry cannot be achieved by any single organization, other stakeholder groups are encouraged to develop their own plans, relative to their respective areas of responsibilities. (Appendix A lists the major stakeholders and describes their major roles in Hawai'i's visitor industry). As such, the *TSP* is intended to guide all stakeholders in working together to attain the State's vision for a Hawai'i that is the best place to live, work and visit.

TOURISM IN HAWAII

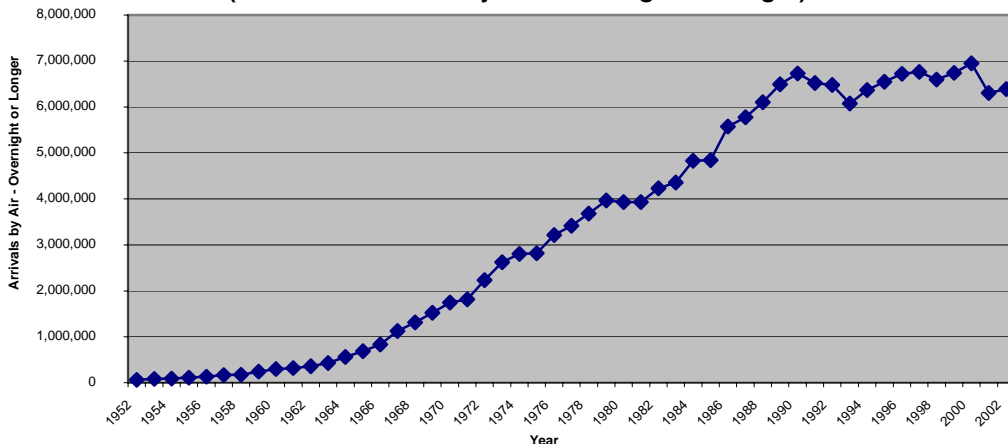
With the arrival of the first settlers from Polynesia, Hawaii began its long history of welcoming visitors. From the mountain to the ocean, Hawaii offered, and continues to provide, stunning vistas, lush rainforests, dramatic mountain ranges, beautiful beaches, and a temperate climate - all conducive to creating a "paradise" in the middle of the Pacific. These first people, the Native Hawaiians, and Hawaii's relative isolation have worked together to produce a distinctive destination experience found no where else in the world.

But Hawaii is also known for its cultural diversity. Between 1852 and 1946, approximately 395,000 people were brought to Hawaii from all parts of the world to work in the sugar fields and support this rapidly growing industry. While some chose to return to their homelands, many of these immigrant workers remained and joined the Native Hawaiians and others who already called Hawaii their home. Those who stayed and raised families forged a community in which diverse cultures and peoples merged to form the multi-cultural society that exists in Hawaii today.

Since statehood in 1959, the visitor industry has grown to become the economic mainstay of Hawaii (see Exhibit 1). In 1991, after enjoying strong and sustained growth in tourism for more than 30 years, Hawaii experienced the beginning of a decline in visitor arrivals. Multiple factors contributed to this trend including weaknesses in key Asian economies, increased global competition, the Persian Gulf War in 1991, and Hurricane Iniki in 1992. This decline continued for several years until a recovery brought about a record year in 2000. However, this economic resurgence was short-lived as the industry, globally and locally, was devastated by the terrorist attacks of September 11, 2001. The economic woes of major countries like the U.S. and Japan, and the concerns about SARS and the Iraq War only compounded the challenges facing the tourism industry worldwide. Changing consumer preferences, shakeups in the airline industry, and technological advances have also recently contributed to revolutionary changes in the industry.

Exhibit 1.

Visitors to Hawaii: 1952 – 2002
(Number of Arrivals by Air – Overnight or Longer)



Source: *Annual Visitor Research Report 2002*, Research and Economic Analysis Division, Department of Business, Economic Development and Tourism, State of Hawaii

Today, tourism is an integral part of Hawai'i's community and, as the chief generator of employment in the State, has a profound influence on many aspects of the lives of Hawai'i's people. In 2003, tourism provided one in every five jobs in the State. This included *direct* (travel-industry related) and *indirect* employment. The visitor industry is pervasive in Hawai'i, rippling through all sectors of the economy.

Tourism is also the primary source of revenue into the community through visitor expenditures and tourism-related capital investment. Based on data and projections from the State of Hawai'i's Department of Business, Economic Development and Tourism (DBEDT), in 2007 it is estimated that Hawai'i's visitor industry will account for \$12.8 billion in spending for travel and tourism, which will generate, directly and indirectly, approximately 22.3% of total jobs in the State. In addition, it is estimated that the visitor industry will produce approximately 17.3% of the Gross State Product and about 26.4% of total tax revenues.

But while tourism remains the leading industry for the State, it is operating within a vastly different global environment. Hawai'i continues to face formidable competitors that are investing heavily in promotion, product development and research. For example, Florida funded an \$80.7 million tourism program in 2002-2003, of which \$23.2 million was spent in advertising; and Las Vegas had a total tourism budget of \$160 million in 2002, of which \$60.1 million was spent in advertising.

However, the global economy and emerging trends have changed the competitive framework for Hawai'i tourism. For instance, as a result of the terrorist attacks on September 11, 2001 and the ongoing war in the Middle East, traveler safety and security has emerged as a significant consideration in today's travel, not just from a consumer's point of view, but also from a national security standpoint. The growth of timeshares, vacation rentals, cruise ships and other alternative accommodation offerings have been both a boon to the health of some companies and destinations, as well as a challenge to others. Advances in technology, consolidation of travel distribution systems, consumers' new lifestyles, greater number and variety of choices, and safety and security issues are changing the reasons people make decisions and the ways they book their trips.

The growth and development of Hawai'i's visitor industry has also had varying impacts on the State, each island, and our residents. As an island state, Hawai'i faces a natural constraint on the development and use of its resources. According to the *2002 Survey of Resident Sentiments on Tourism in Hawaii*, 50% of residents surveyed noted that tourism has been "mostly good" for themselves and their families (down from 58% in 1999) and is a positive contributor to jobs (80%), the standard of living (67%), and the overall quality of life in the islands (67%). However, significant numbers of residents also believe that tourism negatively impacts traffic (54%), crime (41%), and the cost of housing (35%). Future population growth and economic development will require more coordinated planning to create the right balance between achieving economic objectives and sustaining Hawai'i's natural, physical, cultural and human resources.

These and other unique assets and resources are identified in the following exhibit which illustrates Hawai'i's position in a global travel industry, highlighting Hawai'i's strengths, weaknesses, opportunities and threats as it moves toward achieving a new vision for Hawai'i's visitor industry (see Exhibit 2).

Exhibit 2.

<p style="text-align: center;"><u>PRESENT STRENGTHS</u></p> <ul style="list-style-type: none"> Brand Awareness Climate Culture and History Destination Allure and Appeal High Visitor Satisfaction Natural Resources People and Aloha Spirit Quality and Variety of Accommodations Safe but Exotic Variety of Activities and Attractions Geographic Isolation 	<p style="text-align: center;"><u>PRESENT WEAKNESSES</u></p> <ul style="list-style-type: none"> Geographic Isolation Inadequate Public and Private Infrastructure Insufficient Visitor-Resident Interaction Lack of "New" Experiences Lack of Accurate Pre- and Post-Arrival Information Lack of Stakeholder Consensus Lag in Business Tourism Visitor Expectations and Misperceptions Volatility of the Inter-Island Transportation Services Volatility of the National and International Airline Industry Maintenance of Public Facilities Limited Awareness and Limited Access to New Experiences Lack of Professional (Certified) Guides
<p style="text-align: center;"><u>FUTURE OPPORTUNITIES</u></p> <ul style="list-style-type: none"> Business Tourism Development Cruise Industry Development Cultural Tourism Development Customize Marketing Programs by Geographic Market Areas Development of New Markets Ferry Development Improve Stewardship of Natural Resources Improve Public and Private Infrastructure Increase Stakeholder Involvement in Tourism Preservation and Perpetuation of Host Culture Sports Tourism Development 	<p style="text-align: center;"><u>FUTURE THREATS</u></p> <ul style="list-style-type: none"> Aging Public and Private Infrastructure Anti-Tourism Sentiment Crime and Drug Use Disruptive World Events Inadequate State Funding Increased Global Competition Increased Homeland Security Measures Insufficient Airlift Internal Strife and Complacency Loss of Identity Differentiation Cost of Hawai'i Experience Cost and Availability of Airline Fuel

VISION

Since its inception, Hawai'i's visitor industry has experienced tremendous growth. To move toward a *sustainable* and *responsible* tourism industry for the State, thoughtfully managing Hawai'i's success, a clear vision is needed. This collective vision statement is a summary of the hopes and aspirations developed from the many comments and suggestions made by Hawai'i's major tourism stakeholder groups - residents, visitor industry, government, and visitors - in response to the question, "What will a successful Hawai'i tourism industry look like in the future?" As such, this vision describes the five components that would make up a successful visitor industry to benefit all stakeholders in the year 2015. Foremost to the success for Hawai'i's visitor industry are its people and place and, as such, they are emphasized in this vision for Hawai'i's future.

By 2015, tourism in Hawai'i will:

- ***honor Hawai'i's people and heritage;***
 - ***value and perpetuate Hawai'i's natural and cultural resources;***
- ***engender mutual respect among all stakeholders;***
 - ***support a vital and sustainable economy; and***
- ***provide a unique, memorable and enriching visitor experience.***

GUIDING PRINCIPLES AND VALUES

All of Hawai'i's visitor industry stakeholders must actively participate to achieve this vision for the State. While each partner may implement a different portion of the plan, all parties must work towards the same purpose. The following general principles express the standards all stakeholders must work to uphold in order to successfully achieve the shared vision. In addition, the *2004 Sustainable Tourism in Hawaii Study* identifies a set of "values" and encourages the visitor industry to "strive to incorporate these key Native Hawaiian values (both concepts and practices) into the operating systems of its organizations and institutions." These values reflect many of the comments generally made by Hawai'i's tourism stakeholders, and exemplify the characteristics that make Hawai'i unique as a place to live in and a place to visit. The guiding principles and Native Hawaiian values mirror each other in many ways, emphasizing the importance of these characteristics, and are further described below:

Guiding Principles

Collaboration – To encourage and support ongoing dialogue, interaction and participation among all stakeholders.

Sustainability – To maximize social and economic benefits to Hawai'i's communities and businesses while respecting, nourishing, preserving and enhancing Hawaii's natural, cultural and human assets.

Responsibility – To encourage all stakeholders in tourism to participate as stewards of Hawai'i's valuable resources through environmentally, socially and culturally responsible actions for the benefit of future generations.

Quality – To provide overall excellence in tourism products and services while ensuring that the unique character and sense of place of Hawai'i are retained, treasured and respected.

Accountability – To incorporate a comprehensive system that plans effectively, measures impacts, evaluates results, and adjusts accordingly.

Native Hawaiian Values

Lōkahi (harmony) - The literal translation of *lōkahi* means agreement, unity, harmony or accord. The figurative translation, however, refers to a group working together toward a common goal with that common goal having a positive benefit for all.

Mālama ʻāina (nourishing the land) – The Hawaiians of old viewed themselves as stewards of the land and ocean which sustained all life. It is critical that Hawai'i's fragile natural environment and resources are nurtured, protected and preserved to sustain future generations of residents and visitors.

Kuleana (responsibility) – All visitor industry stakeholders have a role to play in the future well-being of Hawai'i as a place to live and a place to visit. Active collaboration, participation and cooperation from all parties are essential to attain a sustainable industry.

Ho'okipa (hospitality) – To properly host visitors, whether invited or unexpected, is an important value in Hawaiian culture. Hawaiians of the past took great pride in hosting, welcoming or entertaining visitors.

Aloha (welcome) – "Alo" - to face, to join, to be one with – and "Ha" – the breath of life – together are manifested and preserved by the people of Hawai'i and represents the intangible spirit of the people of this land.

IMPLEMENTATION FRAMEWORK

When speaking about the “visitor industry,” what generally comes to mind are those directly involved in hotels and other accommodations, airlines, car rental agencies, visitor attractions, tour operators, and restaurants and retail operations. However, in Hawai‘i, tourism is everyone’s business. As the lead economic activity in the State, tourism impacts nearly all private businesses, community organizations, government, unions, visitors and residents.

A true partnership between the community, business and government to oversee tourism marketing and development from a statewide perspective is critical. The strategic initiatives emphasized in the *TSP* and the directions offered provide the guidance needed for all partners to work together to achieve the vision for Hawai‘i’s visitor industry future. Success will be achieved by embracing the desires and concerns of the community and implementing the strategies outlined in this plan.

Overall Management of Plan

Key to this effort will be the Governor’s Tourism Liaison and the HTA who must work to ensure the participation and support of the government agencies who have a role in this effort, and encourage the involvement of the private sector, community organizations, residents and visitors as the other major stakeholders in Hawai‘i’s visitor industry future. The Tourism Liaison will take the role of coordinating with all the various agencies within the State Executive Branch to ensure that major tourism-related initiatives are being implemented by those stakeholders. The HTA will continually monitor the various stakeholder action plans and measures of success (discussed in the following chapter) and prepare an annual “report card” on the status of the completion of the various initiatives.

Development of Action Plans

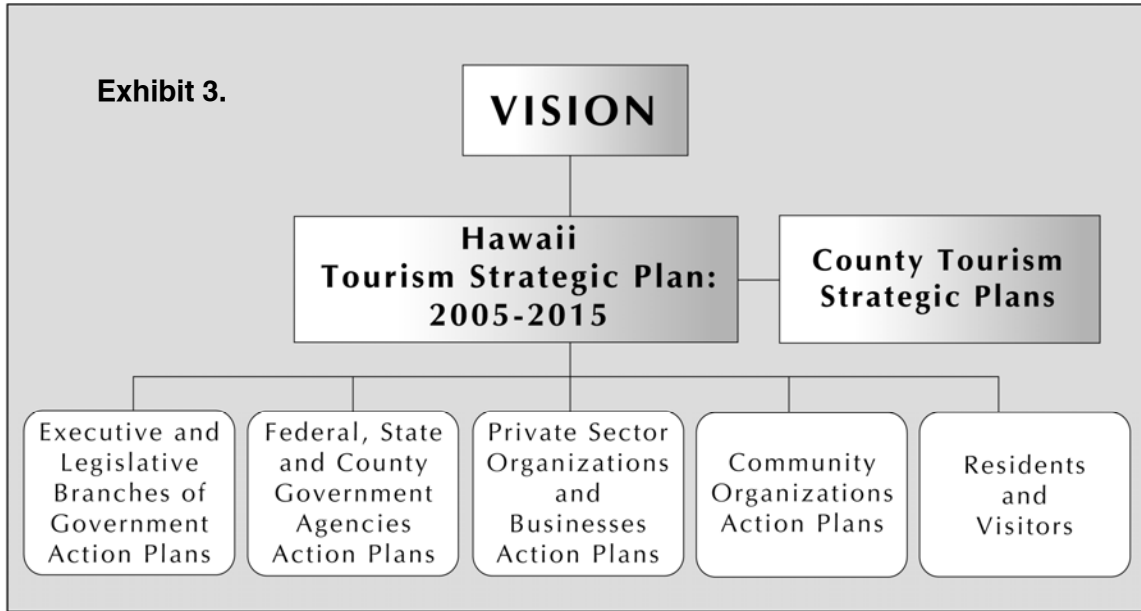
Stakeholder groups (including counties) must review their own primary mission and resources, and develop action plans as they relate to the *TSP* goals and objectives. However, specific actions must be further developed by each stakeholder group and by each county, so that specific tasks can be assigned to lead organizations. For others, the role may be one of a supporter, advocating for resources to assist the lead entities in completing their tasks. Exhibit 3 illustrates how the *TSP* might feed into various organizations’ plans and efforts to work to achieve the vision for Hawai‘i’s tourism future.

Implementation of Action Plans

Once action plans have been developed, lead organizations and the key supporting partners will implement specific strategies. Additionally, government agencies from all levels, private sector organizations and businesses, and community groups and individuals need to work together to implement the various components of the *TSP*. Appendix A provides a list of stakeholders most frequently noted in this plan. Along with the most familiar acronyms used to identify the stakeholders are abbreviated descriptions of the primary mission of each group.

County Tourism Strategic Plans

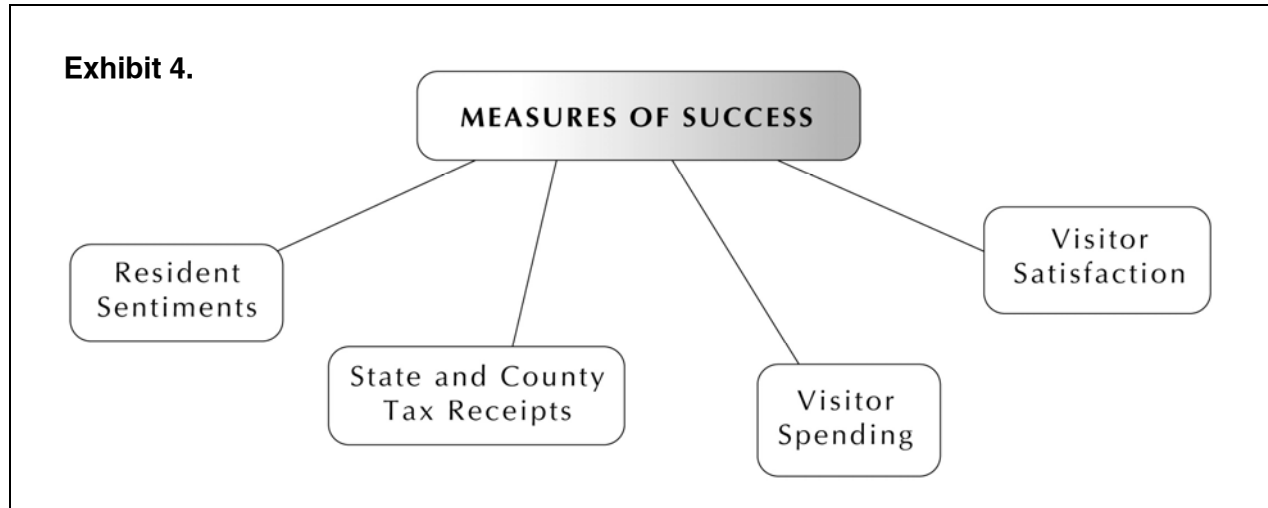
In addition, the second phase of this planning effort involves the counties. Not everyone within the State has the same goals for tourism. Each county, and even each island or community, is unique and has different values. The HTA has set aside funds to help each county develop their respective County Tourism Strategic Plans that will address the more specific needs of tourism stakeholders. Detailed action items that were suggested through the public input process for this *TSP* will be shared with the appropriate agencies and counties to provide a starting point for these county plans.



The *TSP* is intended to form the *foundation* upon which Hawai'i's future as a visitor destination will be built. The plan is intended to be a *primer* for Hawai'i's visitor industry in particular but has potential impact on other segments of Hawai'i's total economy and future. It represents an effort to take better control of Hawai'i's future, but the *TSP* will only be successful if all stakeholders participate and take on the tasks that fall under their areas of responsibility, as the lead organization or as a supporting partner. Cooperation, collaboration, and participation by all stakeholders will help attain the vision for Hawai'i's visitor industry into the next decade.

MEASURES OF SUCCESS

As a long-range plan, efforts must be continually monitored and evaluated, and adjustments made to keep all stakeholders on the same path to success. As the agency mandated to develop this plan, the HTA will report on four high level measurements in its annual legislative report (see Exhibit 4).



These measurements (which are described in more detail below) provide indicators of the overall health of Hawai'i's visitor industry and, as such, will help to gauge if the State is successfully attaining its 2015 vision. Additionally, they address some of the individual initiatives in more specific ways.

It should also be noted that these four measurements are not the only performance measures listed in the *TSP*. Each of the initiatives in the plan includes a set of specific indicators over and above the general measures of success that may be monitored to evaluate success and provide accountability. Each of the specific initiatives contributes to the broader overall vision and goals and, therefore, should be monitored. However, unlike these four overall measurements which HTA will report on through the annual report of the HTA, primary responsibility to monitor each initiative rests with the identified lead partners.

For each strategic initiative, general and specific indicators have been identified to help measure the degree of collective success in achieving the vision. Using benchmarks from previous years, Hawai'i must determine whether to work towards raising the benchmark up (as in the case of tax contributions to the State) or lowering it (as in the case of reducing resident concerns about tourism). Tracking this information and the trends in the data will provide measures of success for the *TSP* and ensure that responsible organizations are accountable for their performance.

Additional information on the four high level measures of success and the instruments used to determine these measures is provided as follows:

- **Resident Sentiment Survey**

Collected and reported every two years; funded through the Tourism Special Fund.

Benchmark Year: 2002

The *Resident Sentiment Survey* (formally, the *Survey of Resident Sentiments on Tourism in Hawaii*) is a tracking survey that uses a statistically valid sample of Hawai'i residents to determine attitudes about tourism. The sample is collected so that results can be measured by island (and in certain cases, parts of islands) and demographic segments, including ethnicity. To date, there have been three surveys conducted which provide useful data points for tracking changes in resident attitudes. The HTA plans to field this survey every other year in the future to measure resident feelings about ongoing issues in the visitor industry including, but not limited to, growth, quality of life issues, job quality (specifically those related to issues affecting the visitor industry workforce), and community values.

The findings of the *Resident Sentiment Survey* will primarily provide measurements for realizing the goals and objectives in *Communications and Outreach; Hawaiian Culture; Natural Resources; Research and Planning; Safety and Security; Tourism Product Development; and Workforce Development*.

The *TSP* vision foresees a future in which tourism will "...honor Hawai'i's people and heritage, value and perpetuate our natural and cultural resources, [and] engender mutual respect among all stakeholders...." The *Resident Sentiment Study* will be instrumental in measuring progress in achieving these specific elements of the vision.

- **Report on Tax Receipts**

Collected and reported every year by Hawai'i State Department of Taxation.

Benchmark Year: 2003

Total tax receipts for the visitor industry are comprised of the Transient Accommodations Tax, the portion of the General Excise Tax related to tourism, concessions and other visitor industry receipts, and government fees and assessments (such as port fees and airport fees related to tourism). These tax revenues provide funds for the welfare of the community through public programs such as education, public safety, and natural resources, and for reinvestment into Hawai'i's tourism marketing, product development and infrastructure.

Tax receipts provide a benchmark for the overall economic health of the visitor industry and (especially in the case of the transient accommodations tax) also provide funds for HTA, county and statewide programs that support tourism in Hawai'i.

The *TSP* vision foresees "a vital and sustainable economy." Tracking tax receipts is key to measuring the attainment of this vision.

- **Visitor Expenditure Study**

Collected and reported every year by Research and Economic Analysis Division (READ) of the Hawai'i State Department of Business, Economic Development and Tourism (DBEDT); funded through the Tourism Special Fund.

Benchmark Year: 2003

Visitor spending is measured by the *Visitor Expenditure Study*. Overall expenditures are reported monthly; a more detailed presentation of expenditure data is reported annually. Tracking visitor expenditures is a long-established part of Hawai'i's basic visitor data, providing planners with tracking data on visitor spending. In addition to providing data on overall spending, the *Visitor Expenditure Study* aids in evaluating plan initiatives because it breaks out data by source market (Major Market Area) and by spending category. With limited expansion in Hawai'i's accommodation base, visitor spending will become increasingly important as a means to achieve economic growth in the visitor industry.

The *Visitor Expenditure Study* data will be especially useful in measuring performance in the *Marketing; Research and Planning;* and *Tourism Product Development* initiatives of the *TSP*.

Tracking visitor expenditures also provides a benchmark for achieving the State's vision of supporting "*a vital and sustainable economy.*"

- **Visitor Satisfaction Survey**

Collected and reported every year by READ; funded through the Tourism Special Fund.

Benchmark Year: 2003

Measurement of visitor satisfaction is accomplished through a survey that is continuously fielded, with results reported annually. These measurements are gathered for Hawai'i's major markets. In addition to measuring overall satisfaction, the survey measures satisfaction levels for different components of the visitor experience (accommodations, attractions, dining, shopping, etc.) and also provides data on what activities visitors engaged in during their vacation. All of the data can be analyzed by source market, island, and demographic characteristics.

Tracking visitor satisfaction and behavior will provide insights regarding visitor participation in cultural events, festivals, and other activities. For the private sector, it provides satisfaction feedback on the consumer experience. Additionally, it helps identify the characteristics of visitors who participate in specific activities such as golf or arts and cultural activities. The *Visitor Satisfaction Survey* touches upon a wide range of visitor experiences and, therefore, will be useful in measuring performance in all initiatives of the strategic plan.

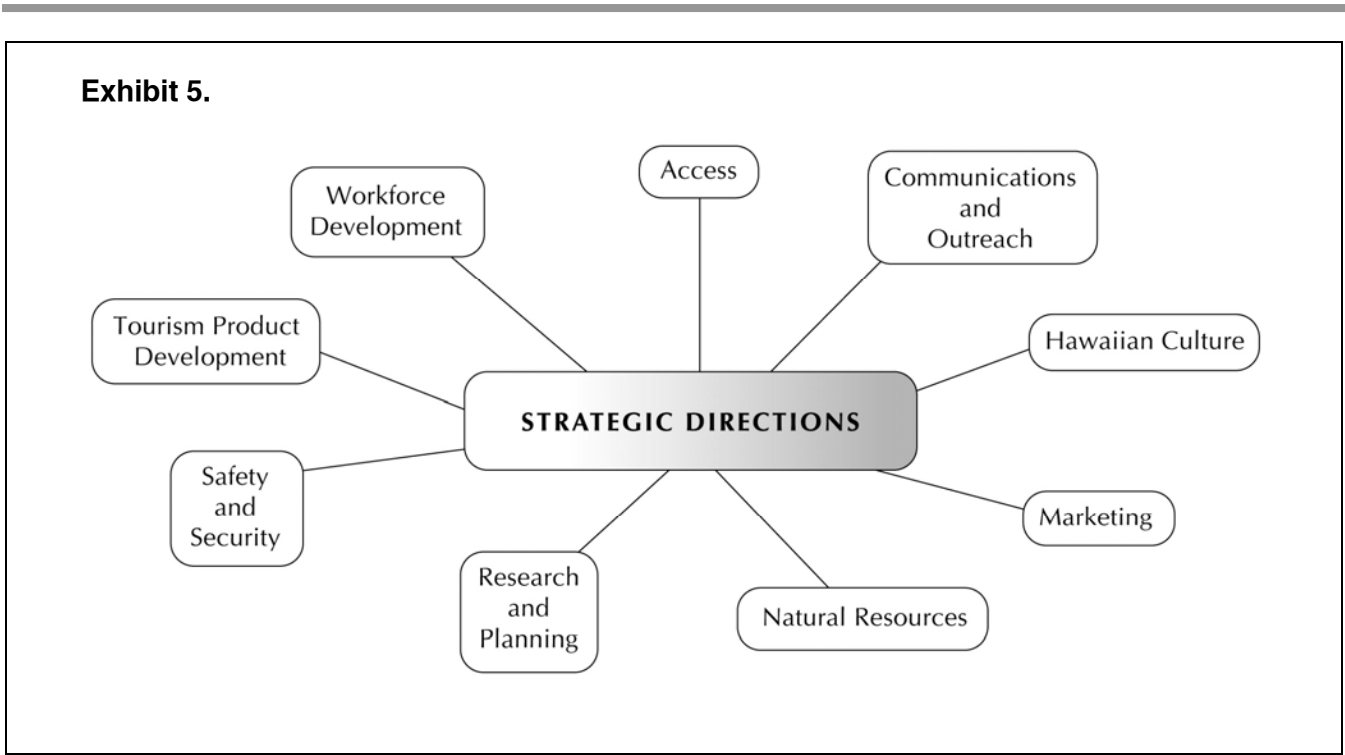
The State's vision seeks to achieve "*a unique, memorable, and enriching visitor experience.*" Measuring visitor satisfaction and behavior will provide a benchmark in achieving this vision.

While implementation of the *TSP* and its strategic initiatives may be creative, flexible and led by various organizations, agencies, and groups, this plan is intended to provide a broad, strategic framework to place all stakeholders on the same path towards a combined vision, and to guide and energize Hawai'i's visitor industry for continued success for the next decade. These common measures of success will help guide all stakeholder efforts toward the common vision. Additionally, more specific measures may guide the lead agencies and partners responsible for individual initiatives and strategic directions.

STRATEGIC DIRECTIONS

The *TSP* has been designed to guide Hawai'i to achieve its 2015 vision of a successful and sustainable tourism industry that will benefit all stakeholders. Specifically, it has been developed to address stakeholder concerns as well as deal with the ongoing and ever-changing challenges facing a global travel industry. To that end, the HTA solicited input from stakeholders to provide feedback on goals and objectives that would help the State achieve the vision of Hawai'i's tourism industry in the year 2015. Importantly, issues relating to the attributes which make Hawai'i unique and special – the Native Hawaiian culture and the State's natural resources – were brought up frequently. In addition to the feedback, a careful analysis of the changes in global events and local conditions elevated the need for increased emphasis on concerns related to safety and security and improving access to Hawai'i.

The result of the community input and analysis of tourism information is the identification of nine initiatives that make the strategic framework of this plan (see Exhibit 5).



For each initiative, the *TSP* provides a brief background, identifies the key issues, and specifies the objectives and an overall goal that will help to contribute to the larger vision of a successful Hawai'i visitor industry in 2015. Integrity for Hawai'i's assets, respect for stakeholders' needs and desires, and responsibility for the industry and the State have shaped the strategies of this plan. With the support of Hawai'i's communities, all levels and branches of government, and the private sector, the Hawaiian Islands will remain a great place to live, a satisfying place to work, and one of the most exciting, premier visitor destinations in the world.

STRATEGIC INITIATIVE: ACCESS

GOAL: To maintain and improve transportation access, infrastructure and services to facilitate travel to, from and within Hawai'i.

BACKGROUND

Hawai'i's geographic isolation presents major transportation challenges for the State. These challenges are especially significant as Hawai'i's visitors are heavily dependent on all modes of transport services - air, sea and land - for getting to and from Hawai'i as well as between and within islands. Currently, the primary transportation modes used by visitors are air carriers, cruise ships, ferries, public transportation vehicles, private buses, rental cars and taxis. A new ferry system, expected in 2006, may add to the existing systems and provide another viable alternative for future inter-island travel.

According to the Hawai'i State Department of Business, Economic Development and Tourism (DBEDT), in 2002, Hawai'i received a total of 6,452,834 visitors, of which 6,389,058 arrived by air and 63,776 arrived by ship. As an island state, Hawai'i relies heavily on transport service provided by air carriers and supporting airport facilities and infrastructure. Harbors and highways are also important in facilitating travel to, from and within Hawai'i. Working to alleviate infrastructural challenges – such as increased traffic congestion and aging facilities – will ease travel for visitors as well as for Hawai'i's residents.

CRITICAL ISSUES

- **Ensuring adequate airlift to Hawai'i has become a challenge due to the increased volatility of the airline industry.** The airline industry entered a new era as a result of the September 11th terrorist attacks on the U.S., when the country's air

travel system was grounded, reinforcing the importance of the airline industry to tourism, and tourism's importance to Hawai'i. Since then, the airline industry has faced tremendous challenges including increased concerns for air safety, decreased passenger loads, higher operating and fuel costs, changing fleet structures, technological advances and changes in consumer behavior. In dealing with these challenges, many carriers have sought to reorganize; cut costs by reducing less-productive flights and eliminating jobs; and reevaluate profitability margins.



- **Unstable financial viability of inter-island air carriers impacts local air service.** Due to financial challenges, Hawai'i's two primary inter-island carriers have revamped their respective business models, focusing current and future plans for their companies on increasing trans-Pacific routes. Currently, these carriers continue to offer inter-island service but with higher pricing structures and reduced scheduling. Inter-island flights have been rescheduled utilizing Honolulu as a hub for inter-island service and ticket pricing

has increased in order for the inter-island carriers to provide profitable inter-island service. Hawai'i's residents and visitors will increasingly depend on smaller air carriers focusing on flights within Hawai'i.

- **Aging and inadequate airport facilities.** Airport facilities statewide are struggling to accommodate recent changes in airlift and security. Airports are congested and their layout is proving to be inadequate as residents and visitors endure long lines before reaching their gates. Visitor satisfaction data show that airport satisfaction has consistently worsened. The *2002 Visitor Satisfaction Survey* found that across all major market areas (MMAs), transportation received the highest dissatisfaction rates, and only 21% of Japanese respondents were very satisfied with airports.



- **Existing harbor facilities will not be able to accommodate Hawai'i's growing cruise industry.** Cruise lines are a fast growing segment of Hawai'i's travel industry. Major cruise lines are increasingly looking at Hawai'i's potential for additional cruising. The DBEDT estimates that 27 vessels will take 123 trips carrying 245,189 passengers in 2004, compared to the 25 vessels that carried 131,700 passengers in 2000. Norwegian Cruise Line (NCL) is expected to dramatically expand their investments in

Hawai'i cruising and host 520,000 passengers by 2007. Even with the cruise industry at its current levels, infrastructure and operational challenges exist in harbor facilities statewide, especially outside of Honolulu, where some harbors can only berth one large ship at a time (see also *Research and Planning*).

- **Existing congestion on roads and highways.** State and county roads and highways are the most important means of transportation on each island for residents and visitors. Residents statewide have expressed major concerns about the maintenance of roads and highways and increasing traffic congestion.

Planning for highway and roadway improvements is ongoing. The *Statewide Transportation Improvement Program – FY 2004 - 2006 (STIP)* (December 2003) identifies transportation improvement programs totaling approximately \$679 million to be implemented during the three-year program period (O'ahu - \$356.0 million; Hawai'i - \$144.8 million; Maui - \$143.7 million; and Kaua'i - \$34.5 million). The projects include those eligible for federal funding assistance as well as regionally significant, locally funded projects.



- **Quality of ground transportation services continues to be a challenge.** O'ahu is the only island that has the density to support an extensive public transportation system. As a result, nearly all visitors on the neighbor islands (and still many on O'ahu) rely on tour buses, taxis or rental cars. Driving on unfamiliar roads can be difficult and dangerous for both visitors and residents. Many visitors have noted the need for improved highway signage including directional signs for major sites. Over half of the Japanese visitors who participated in the 2002 *Visitor Satisfaction Survey* toured the islands by trolleys, followed by taxis or limousines, public buses, and rental cars, and only 32.3% were very satisfied with transportation in Hawai'i.

Another ground transportation issue affecting a visitor's traveling experience in Hawai'i is the level of service provided by rental car agencies and taxi drivers. For example, rental car agencies on some islands do not service renters if flights are delayed past their regular operating hours. Also, some of the regulations that apply to ground transportation service providers are either inconsistent or not enforced, resulting in different qualities of service provided to the visitor. The overall quality of taxi services (e.g., poorly maintained vehicles and drivers who lack knowledge of Hawai'i or have language challenges) is another problem related to the fact that there are various levels of service provided by different taxi companies.

- **Arrival and departure facilities and experiences continue to impact first and last impressions of Hawai'i's visitors.** Hawai'i's airports are not just an integral transportation system but part of the hospitality industry. The airport system must also meet the requirements of increased Homeland Security rules and regulations because of current global and

political conditions, while still offering convenience and efficiency to the airlines and visitors. Most visitors' first and last experiences in Hawai'i happen at a State airport. Therefore, it is imperative that the arrival and departure experience at all airports is efficient, cost effective for the airlines, easy to access and navigate through, and one that conveys the spirit of *aloha*.

Some visitors experience Hawai'i as cruise ship passengers, arriving and departing at harbors throughout the State. The majority of Hawai'i's harbors were built for functional purposes such as small boat harbors or to handle island cargo needs and, as such, lack ambiance and are inadequate for the current and projected needs of the cruise industry, and existing and proposed ferry systems. Complicating harbor planning is the fact that larger harbors are under the jurisdiction of the Hawai'i State Department of Transportation and smaller harbors are managed by the Hawai'i State Department of Land and Natural Resources.



Cruise Ship Passengers Greeted at Lahaina Harbor

- **Global conditions require increased Homeland Security operations to ensure travelers' safety.** The war on terrorism has led to infrastructure challenges at Hawai'i's airports and harbors due to the

increased security measures required to meet the Homeland Security rules and regulations. New regulations and infrastructural challenges have created congestion and longer wait times at check in counters, baggage screening areas and security check points.

- **Increased Homeland Security measures heavily impact the international visitor market.** The U.S. Department of Homeland Security (DHS) has administered the nation's immigration laws since March 2003 when Immigration and Naturalization Services became part of DHS, currently named Customs and Border Protection (CBP). DHS has implemented a new entry/exit process called U.S. Visit. U.S. Visit is part of a continuum of security measures that begins overseas, when visitors apply for a visa to enter the U.S. and continues through entry and exit at U.S. air and seaports. Because of these increased security measures, which now require both a written application and a face-to-face interview, potential visitors from non-visa waiver countries have had difficulties in obtaining visas to enter the U.S. Additionally the U.S. Visit program at Hawai'i's ports of entry, currently for only non-visa waiver countries, has lengthened the processing time in our customs and immigration facilities. Beginning October 1, 2004, all international passengers will have to be processed through the U.S. Visit program when entering Hawai'i's ports. Because of the limited infrastructure space at Honolulu and Kona International Airports, minimal CBP officers and high volume arrival times by international flights within a short period of time, it is anticipated that the processing time for customs and immigration will be approximately 71 minutes per passenger.

STRATEGIC DIRECTIONS

Sufficient, convenient, efficient and enjoyable access to, from and within Hawai'i is critical to Hawai'i's visitor industry success. The strategic planning for this initiative encompasses the following objectives that relate to air, land and sea transportation systems:

1. **Ensure adequate lift to Hawai'i** by:
 - a. Leveraging opportunities to benefit both the State and the air carriers that provide service to Hawai'i from out-of-state markets.
 - b. Developing a strong partnership between the State and Hawai'i's air carriers to ensure that all are kept abreast of trends and challenges facing the airline industry (see also *Communications and Outreach*).
 - c. Being proactive in working with the airlines to encourage new flights and routes to Hawai'i and to ensure that flights are not reduced.
 - d. Updating airport master plans to ensure that improvements support and not discourage air carriers to maintain or increase service to Hawai'i (see also *Research and Planning*).
 - e. Encouraging input from airlines and others for airport master plans (see also *Communications and Outreach*).
2. **Improve inter-island transportation services** by:
 - a. Supporting inter-island ferry services and inter-island air carriers.
 - b. Providing improved airport shuttle services, better waiting room facilities and passenger amenities at all terminals.
3. **Improve airports and supporting systems** by:
 - a. Updating and implementing airport master plans to ensure that airport

facilities are adequate and maintained (see also *Research and Planning*), and creatively exploring all available federal funding sources.

- b. Encouraging input from airlines and others for airport master plans (see also *Communications and Outreach*).
- c. Monitoring visitor satisfaction data related to airports (see also *Communications and Outreach*).
- d. Enhancing amenities such as shuttle bus services, and informative and directional signage.
- e. Improving infrastructure to facilitate positive arrival and departure experiences and ensure a “Hawaiian sense of place.”
- f. Providing hospitality training for staff that deal with visitors (e.g., immigration, customs, security and agricultural inspectors), and providing a sufficient number of staff to ensure efficiency in operations (see also *Workforce Development*).



Visitors Greeted at Līhu‘e Airport

4. Improve harbors and supporting systems by:

- a. Updating and implementing harbor master plans to ensure that improvements support and not discourage cruise ships to maintain or increase service to Hawai‘i (see also *Research and Planning*).

- b. Encouraging input from cruise lines and others for harbor master plans (see also *Communications and Outreach*).
- c. Studying the impacts of increased cruise and ferry usage, as well as cargo, ocean activity and other commercial operations, and developing public policy recommendations (see also *Research and Planning*).
- d. Conducting ongoing and coordinated planning to make appropriate improvements including cost-sharing with harbor users (see also *Research and Planning*).
- e. Expanding pier facilities and services at harbors targeted for increased cruise and ferry usage, and creatively exploring all available federal funding sources.
- f. Providing better informational and directional signage, and exploring alternative funding programs that could enhance the aesthetic experience of surrounding areas.

5. Improve roads, highways and ground transportation systems by:

- a. Updating and implementing highway master plans to ensure that infrastructure is adequate and maintained (see also *Research and Planning* and *Communications and Outreach*).
- b. Studying the impacts of increased cruise and ferry usage on traffic and roadway infrastructure.
- c. Monitoring resident sentiments and visitor satisfaction data related to ground transportation (see also *Communications and Outreach*).
- d. Conducting periodic traffic impact assessments, and ongoing and coordinated planning to make appropriate improvements (see also *Research and Planning*).

- e. Encouraging collaboration between ground transportation providers, other transport service providers and accommodations and attractions providers (see also *Communications and Outreach*).
- f. Providing better informational and directional signage leading to and along roadways.
- g. Prioritizing and funding targeted road improvements, and creatively exploring all available federal funding sources.
- h. Exploring alternatives means of ground transportation including public transportation where possible (e.g., expanded bus service).
- i. Exploring federally funded programs such as the Scenic Byways and Heritage Corridor programs as alternatives that could enhance the aesthetic experience of roads that also serve as “visitor attractions.”

6. *Ensure safe passage for residents and visitors* by:

- a. Ensuring that Homeland Security issues are addressed.
- b. Providing adequate security staffing and coordinating security needs with flight schedules.
- c. Improving physical operations at security gates (roomier and more attractive queuing areas) and providing better informational and directional signage.

7. *Expedite processing of visas* by:

- a. Ensuring that Customs and Border Protection (CBP) has adequate staffing to process international guests in a timely manner and that all CBP booths are staffed and operational during peak international inbound hours.
- b. Improving infrastructure to adequately address the U.S. Visit process in a hospitable and friendly manner.

- c. Encouraging Department of Homeland Security to adequately staff the embassies and consulates in order to expedite visa applications in a timely manner.
- d. Encouraging Department of Homeland Security to find alternatives and opportunities for issuing multi-visit visas for business and leisure travelers that are deemed to be non-threatening to national security.
- e. Encouraging Department of Homeland Security to work with the governments of non-visa waiver countries to establish improved application and processing parameters.

8. *Encourage coordination, collaboration and improved ground transportation services* by:

- a. Ensuring a minimum level of service such as having car rental companies remain open to provide services for travelers delayed by flights.
- b. Encouraging car rental agencies to review their policies regarding responsibilities to renters who are involved in traffic accidents.
- c. Exploring establishment of uniform standards for taxi drivers, tour bus operators and other ground transportation service providers to ensure safe and improved service (see also *Workforce Development*).
- d. Encouraging collaboration between activities and ground transportation providers.
- e. Improving public transport between airports and hotels.

STRATEGIC FRAMEWORK: ACCESS

GOAL

To maintain and improve transportation access, infrastructure and services to facilitate travel to, from and within Hawai'i.

OBJECTIVES

- Ensure adequate lift to Hawai'i.
- Improve inter-island transportation services.
- Improve airports and supporting systems.
- Improve harbors and supporting systems.
- Improve roads, highways and ground transportation systems.
- Ensure safe passage for residents and visitors.
- Expedite processing of visas.
- Encourage coordination, collaboration and improved ground transportation services.

<p>Lead:</p>	<p>Government: Department of Transportation; Department of Land and Natural Resources; county planning and transportation-related departments Private Sector: Transportation companies (e.g., airlines, tour bus and taxi companies, rental car agencies, cruise lines, ferry services) Community: Hawaii Car and Truck Renting and Leasing Association; Hawaii Transportation Association</p>
<p>Supporting Groups/Agencies:</p>	<p>Office of the Governor; Homeland Security Departments of Customs and Border Protection and Transportation Security Administration; legislature and county councils; Hawaii Tourism Authority; Public Utilities Commission; Federal Aviation Administration; Federal Department of Transportation; other government agencies; other harbor and airport users; residents and visitors</p>
<p>Measures of Success:</p>	<p>Specific to issues related to access, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Increased scheduled flights to and within Hawai'i during shoulder seasons • Updated and coordinated State and county master plans for airports, harbors and highways • Faster check-in, customs and immigration, and security processing times at airports and harbors • Decreased congestion in airports and harbors • Decreased traffic congestion on roadways • Increased visitor satisfaction with airports and ground transportation • Fewer visitor complaints about airports and ground transportation

STRATEGIC INITIATIVE: COMMUNICATIONS AND OUTREACH

GOAL: To facilitate interaction among all visitor industry stakeholders that improves the lines of communication and enhances greater understanding of roles, values and concerns.

BACKGROUND

In Hawai'i, tourism is the primary economic engine, accounting for one out of every five jobs in the State, according to the Hawai'i State Department of Business, Economic Development and Tourism (DBEDT), producing 22% of the gross state product and generating one-quarter of total State and county tax revenues. For this reason, everyone is a stakeholder in Hawai'i tourism – residents, private business, government agencies and visitors. To be successful, all of the stakeholders need to feel that their issues and feelings are understood, and that they understand and appreciate the concerns and issues of other stakeholders.

The strategies outlined for this initiative are intended to accomplish the following: 1) ensure that information about tourism's benefits and impacts, as well as stakeholders' issues or concerns about tourism, is accurately and consistently communicated to all; and 2) ensure that there are opportunities for ongoing dialogue, participation and involvement in tourism matters by all stakeholders.

CRITICAL ISSUES

- **Stakeholder attitudes are critical to the successful development of the visitor industry and the maintenance of community values.**

Residents. As stakeholders in Hawai'i tourism, residents and their feelings about tourism are very important. According to the *2002 Survey of Resident Sentiments on*

Tourism in Hawaii, 50% of residents believe that tourism has been "mostly good" for themselves and their families (down from 58% in 1999). Eighty-eight percent of residents also support at least some form of managed growth in tourism. A sampling of results from the survey shows that residents believe that tourism is a positive contributor to jobs (80%), shopping choices (70%), standard of living (67%), and the overall quality of life in the islands (67%). Despite these generally positive feelings towards tourism, significant numbers of residents believe that tourism negatively impacts traffic (54%), crime (41%), the cost of housing (35%), and other quality of life issues. From the community meetings that were held in conjunction with the development of this plan, some residents expressed feelings that tourism is not consistent with local community values and that there is a lack of understanding, respect, or acknowledgement by the visitor industry of the community's concerns regarding tourism. Left unchecked, these community concerns may result in a resentment towards the tourism industry and an erosion of the *aloha* spirit.

Visitor Industry. Although tourism is the economic mainstay of Hawai'i, providing jobs and generating tax revenues that support important public programs (e.g., schools, highways, police and parks), many visitor industry stakeholders feel that public awareness, appreciation and respect for the industry's value and contributions are low, even among the industry workforce. The visitor industry

has not communicated well with the community about the value and contributions of tourism to Hawai'i's quality of life.

Policy Makers. To ensure the development of tourism plans, policies and programs that are in line with stakeholder desires and maximize benefits to Hawai'i's communities, Hawai'i's policy makers need: 1) accurate and consistent information about tourism issues and plans; and 2) regular input from residents and the industry about tourism issues and concerns.

Visitors. The quality of a Hawai'i visitor's experience is affected by the accuracy, consistency and availability of the information provided about the destination. To fully appreciate Hawai'i, visitors need easily accessible information on what to expect in Hawai'i (events, activities and attractions) and what is expected of them (protocol at Hawaiian cultural sites; proper use of parks, beaches, trails and roads; safety procedures to prevent crime and in emergency situations). Without this, visitors may be disappointed that Hawai'i did not meet their expectations; expose themselves to hazardous situations; or they may behave in ways that alienate island residents.

STRATEGIC DIRECTIONS

The long-term success of tourism in Hawai'i is ultimately dependent on all stakeholders gaining a better understanding of and sensitivity to, each other's needs, concerns and contributions. To foster this, the strategic planning for this initiative identifies the following objectives:

1. ***Raise the awareness of stakeholders' concerns about tourism, among the various players and develop programs to address concerns*** by:
 - a. Regularly conducting and distributing the findings of stakeholder surveys to the other stakeholders groups (e.g., resident and workforce surveys to industry and policy-makers, and vice-versa).
 - b. Conducting outreach programs and providing forums that would allow representatives from all stakeholder groups to air their concerns, questions and suggestions about various tourism issues.
2. ***Increase stakeholders' knowledge and understanding of tourism issues, contributions and impacts*** by:
 - a. Providing and coordinating accurate and consistent information about tourism issues, contributions and impacts to all stakeholders through various communication vehicles (e.g., websites, printed material and informational meetings).
 - b. Continuing research programs that can provide objective measurements of resident attitudes in order to provide feedback to the visitor industry and policy makers for use in development of tourism plans, programs and policies (see also *Research and Planning*).
 - c. Improving programs aimed at providing visitors with accurate information about what to expect when visiting Hawai'i and what is expected of them.
3. ***Support efforts that involve stakeholder participation, collaboration, interaction and discussion on tourism issues and efforts*** by:
 - a. Developing and coordinating outreach programs such as an annual tourism conference or a tourism workshop on a specific topic (both regularly scheduled or on an as needed basis) that allow stakeholders to share information and ideas, learn

about tourism, and generate stakeholder interaction and participation in tourism issues.

- b. Encouraging interactive visitor industry and community involvement (e.g., industry participation on community boards and associations; and community participation in tourism-related activities).
- c. Developing and supporting programs that increase pride and involvement in tourism from all stakeholders.

4. Provide and promote opportunities that involve resident and visitor interaction by:

- a. Providing support for new and existing activities that are interesting to both residents and visitors and that encourage their interaction, as well as making information available to all stakeholders about those events (see also *Tourism Product Development*).



Focus Group Meeting for the *TSP*
Hilo, Hawai'i (April 2004)

STRATEGIC FRAMEWORK: COMMUNICATIONS AND OUTREACH

GOAL

To facilitate interaction among all visitor industry stakeholders that improves the lines of communication and enhances greater understanding of roles, values and concerns.

OBJECTIVES

- Raise the awareness of stakeholders’ concerns about tourism, among the various players and develop programs to address concerns.
- Increase stakeholders’ knowledge and understanding of tourism issues, contributions and impacts.
- Support efforts that involve stakeholder participation, collaboration, interaction and discussion on tourism issues and efforts.
- Provide and promote opportunities that involve resident and visitor interaction.

Lead:	<p>Government: Hawaii Tourism Authority; counties Private Sector: Visitor industry organizations and businesses; Hawai’i media Community: Community groups; residents; visitors</p>
Supporting Groups/Agencies:	<p>Office of the Governor; Department of Business, Economic Development and Tourism; Department of Land and Natural Resources; Department of Transportation; Department of Taxation; other government agencies; workforce unions; non-profit organizations</p>
Measures of Success:	<p>Specific to issues related to communications and outreach efforts, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Answers in Resident Sentiment Surveys regarding attitudes about tourism remain positive and/or improve • Answers in Visitor Satisfaction Surveys about quality of the visitor experience remain positive and/or improve • Outreach programs are regularly scheduled and provided on an as needed basis • Funding levels for tourism programs and efforts are maintained and/or increased

STRATEGIC INITIATIVE: HAWAIIAN CULTURE

GOAL: To honor and perpetuate the Hawaiian culture and community.

BACKGROUND

A successful, sustainable tourism industry in Hawai'i honors Hawai'i's host culture, its people and their history; protects its unique natural environment; and engages local communities. People from all over the world representing many different cultures have made Hawai'i their home and have helped to make Hawai'i a top visitor destination. However, Native Hawaiians and their "host culture" are what continue to make Hawai'i unique and different from other destinations around the world.

A visitor experience occurs whenever the following three elements converge: *visitor*, *host* and *place*. Much of Hawai'i's tourism industry subscribes to the prevailing "customer is always right" business model that recognizes the "visitor" as the most important of the three elements. Consequently, to successfully operate within the contemporary "western" model, the other two elements "place" and "host" are continually changing to accommodate the "visitor" which results in a destination that begins to resemble other destinations elsewhere and creates a disconnect between Native Hawaiians, the industry and the visitor. The Native Hawaiian *ho'okipa* model, however, is a "place-based" model that honors the place, dignifies the host and eventually satisfies the needs of the visitor.

As set forth in the *2004 Sustainable Tourism in Hawaii Study (Sustainable Tourism Study)* relating to *Socio-Cultural Impacts of Tourism in Hawaii: Impacts on Native Hawaiians*, the Native Hawaiian practice of *ho'okipa* (the practice of greeting and welcoming strangers), is an important cultural

component that is deeply embedded in the Native Hawaiian behavior system, where *'āina* or the "place" is the focal point. This "preferred business model embraced by Native Hawaiians is a model that makes preserving the dignity and cultural landscape of the place as the most important element...Italy is particularly filled with township models such as Florence and Venice, where preservation of the place equals sustainable market share...Sustainability and the preservation of the cultural landscape is the new model of global tourism...Such a model is more sustainable because it preserves the goodwill of the host by celebrating the place and maintains the market value of the destination by preserving its cultural uniqueness."

A key aspect that separates Hawai'i as a globally unique visitor experience from all others is the highly valued Native Hawaiian culture. By focusing on the Native Hawaiian, the intent here is to properly emphasize the importance of the Native Hawaiian culture and community to the quality of life of Hawai'i's residents as well as to the quality of Hawai'i's visitor experience and not to diminish the impact or role that other cultures play in our "local" culture. Issues regarding the perpetuation of the other cultures are addressed elsewhere in the initiatives on *Tourism Product Development* and *Workforce Development*.

CRITICAL ISSUES

- **"Disconnect" exists in the relationship between the visitor industry and Native Hawaiian community.** The Native Hawaiian culture is unique to Hawai'i and is promoted to attract visitors;

however, many Hawaiians feel alienated by the visitor industry. As noted in the *Sustainable Tourism Study*, many Native Hawaiians feel that the growth of the tourism industry has compromised their cultural integrity in the global marketplace, diminished their presence in Hawai'i's visitor centers, devalued their sacred places and seriously compromised a Native Hawaiian sense of place in areas like Waikiki.

- ***The Hawaiian culture is often inaccurately portrayed.*** Native Hawaiians and their culture are frequently used in marketing campaigns without appropriate consultation, which can result in misleading, and inaccurate portrayals. Visitor industry employees, who lack knowledge about the Native Hawaiians and their culture, can also contribute to this distortion and misrepresentation. In addition, the Hawaiian culture and other Pacific Island cultures are often presented together, leading to the homogenization of cultures and further misrepresentation of the Native Hawaiian culture.
- ***The Hawaiian culture needs to be respected and perpetuated.*** For a culture to be perpetuated for future generations, it must be protected, respected and valued. As such, Hawaiian cultural practitioners, musicians, craftspeople and artists who keep the culture "alive" and make Hawai'i a special place need support and nurturing. In addition, Hawaiian cultural sites are important to Hawai'i's heritage and valuable to the visitor industry. All cultural sites, those appropriate for visitation and those sacred and inaccessible to the public, must also be respected and protected.



Mo'okini Heiau State Monument, Hawai'i

STRATEGIC DIRECTIONS

While there is a desire to perpetuate and preserve Hawai'i's host culture, a "disconnect" between the Native Hawaiian community and the visitor industry remains. As such the strategic planning for this initiative identifies the following objectives:

1. ***Strengthen the relationship between the visitor industry and the Hawaiian community*** by:
 - a. Increasing the collaboration between visitor industry and Native Hawaiian organizations such as the Native Hawaiian Hospitality Association (NaHHA), Hawai'i State Office of Hawaiian Affairs (OHA), Hawaiian Royal Societies and Association of Hawaiian Civic Clubs, to allow for the sharing of ideas and to provide opportunities for interaction and understanding.
 - b. Exploring opportunities for representatives of Native Hawaiian organizations to actively participate in visitor industry organizations or to provide their input (permission, collaboration, participation) in tourism planning and policy development.
 - c. Instructing local, State and national policy makers in Native Hawaiian cultural practices and protocols that

are relevant to a sustainable tourism industry.

- d. Engaging in activities independently or collaborating with Native Hawaiian cultural practitioners to perpetuate traditional ways to sustain cultural knowledge and resources.
- e. Engaging in experiences which *mālama* the environment (e.g., beach cleanups, native forest restoration) to support practices of stewardship and sustainability (see also *Natural Resources*).
- f. Supporting organizational capacity building of NaHHA to take the lead in planning and implementing various strategies to honor and perpetuate the Hawaiian culture.

2. Strive to nurture (*mālama*) the Hawaiian culture by creating visitor experiences, activities and marketing programs that are respectful and accurate by:

- a. Supporting *aloha* for Hawaiian language, history, culture and values to perpetuate the unique cultural heritage of Hawai'i.
- b. Encouraging the visitor industry to solicit input from Native Hawaiian groups or to consult with cultural practitioners to accurately portray cultural activities and programs (see also *Communications and Outreach*).
- c. Providing collaborative education and training about the Native Hawaiian culture and related issues (such as sovereignty efforts) for individuals working in the visitor industry (e.g., owners, employees, managers, commercial tour operators, and others) who have direct contact with Hawai'i's visitors (see also *Workforce Development*).
- d. Developing interpretive and other signage in two "official" languages - Hawaiian and English – to add credibility to the native language while educating visitors and residents.

- e. Developing educational programs for visitors and residents to inform and expose them to authentic Hawaiian language, culture, values and arts, while at the same time, perpetuating Hawaiian culture, values and hospitality.
- f. Increasing the use of Hawaiian words, values and place names throughout the State and enhancing Hawaiian studies programs that add to the "sense of place" and distinguish Hawai'i from other destinations.



Waikiki Historic Marker

3. Support Hawaiian programs and cultural practitioners, craftsmen, musicians and other artists to preserve and perpetuate Hawaiian culture where appropriate by:

- a. Identifying each community's cultural resources that are willing to participate in and collaborate with Hawai'i's visitor industry.

- b. Honoring, understanding and practicing proper protocol for access to and care of appropriate Hawaiian cultural resources and sites to help manage Hawai'i's fragile cultural and historic resources (see also *Natural Resources*).
- c. Providing fair compensation for the use of intellectual property by those who preserve and perpetuate the Hawaiian culture and share this knowledge with residents and visitors to convey the value for this knowledge.
- d. Supporting Hawai'i's agricultural and arts and crafts industries by featuring unique Hawai'i-made products in airports, harbors, and other retail operations.



STRATEGIC FRAMEWORK: HAWAIIAN CULTURE

GOAL

To honor and perpetuate the Hawaiian culture and community.

OBJECTIVES

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

<p>Lead:</p>	<p>Private Sector: Native Hawaiian Hospitality Association; visitor industry organizations and businesses Community: Hawaiian organizations and cultural practitioners</p>
<p>Supporting Groups/Agencies:</p>	<p>Hawaii Tourism Authority; Office of Hawaiian Affairs; State Foundation on Culture and the Arts; Office of the Governor; University of Hawai'i – School of Travel Industry Management and Hawaiian Studies programs; other government agencies; Hawai'i Hotel and Lodging Association; Activities and Attractions Association of Hawaii; Hawaii Ecotourism Association; business organizations; residents; visitors</p>
<p>Measures of Success:</p>	<p>Specific to issues related to the Hawaiian culture, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Increasing the number of representatives from the Native Hawaiian community on visitor industry organizations and boards • Residents and visitors express satisfaction and appreciation for Native Hawaiian culture • Educational programs and material have been developed for educating visitors and those working in the industry on authentic Hawaiian language, culture, music and crafts, and Hawaiian sovereignty issues • Marketing programs for the State have been reviewed by representatives from the Native Hawaiian community and reflect sensitive and accurate portrayals of Native Hawaiians and Hawaiian culture • Native Hawaiians have identified cultural sites that can be visited and those that are to be restricted, and have developed protocol for all sites

STRATEGIC INITIATIVE: MARKETING

GOAL: To develop marketing programs that contribute to sustainable economic growth.

BACKGROUND

Hawai'i's accommodations have limited capacity for growth in visitor days and visitor census and there are very few plans for expansion of the existing base. As a result of these limits, the focus of marketing programs has been to (at least since the 2002 *Ke Kumu*) emphasize increased visitor expenditures rather than visitor arrivals. Overall changes in total visitor expenditures are tracked as the primary success indicator for marketing programs. The contributing factors for visitor expenditures are: 1) expenditures per person per day; 2) average length of stay; and 3) visitor arrivals. These components are also tracked to analyze market performance. (This strategy is somewhat tempered by the projected growth of the cruise ship industry – most of whose guests are accommodated on the ships, and not as dependent on ground accommodations. If, for instance, hotel occupancy remains at current levels, but the cruise ship industry realizes projected growth levels, there will be a need to increase airlift to the islands.)

In order to achieve an increase in expenditures without significant increases in visitor arrivals, the role of marketing needs to be focused on two key points: 1) selectively targeting visitors who spend a disproportionate share of their disposable income on indulgent or active travel; and 2) creating a relevant brand image that communicates Hawai'i's unique competitive advantages, including its culture and the diversity of things to see, do, and experience here.

Recognizing that the term "marketing" encompasses a broad range of activities including research and product development, this initiative focuses on those aspects of marketing which drive "demand." In particular, strategies for this initiative center around advertising, promotions, sales and public relations efforts that affect Hawai'i's desirability as a visitor destination.

An overall objective of the *TSP* is to increase visitor expenditures, in part by attracting higher-spending visitors. To accomplish this, Hawai'i marketing programs will target those visitor segments that have per day and/or per trip spending patterns higher than the norm. Additionally, these programs should take into account the various segments of the visitor industry to ensure that the economic benefits are broad-based. For example, weddings and honeymooners impact resorts; cultural tourism impacts attractions and museums; first-time cruise visitors impact retail; convention and incentive travelers impact restaurants and destination services; and golfers impact resorts and golf courses. In short, there is no single identifying feature of higher spending visitors, and action plans should account for the diverse types of visitors that will provide a broad economic base for Hawai'i tourism.

CRITICAL ISSUES

- ***Hawai'i's strong leisure image makes it difficult to establish it as a serious business destination.*** Hawai'i is well recognized as a premier leisure destination. However, the strong "resort" image for Hawai'i has hampered development of meetings and convention

business, and other business activity in the State. Development of the business visitor market (people traveling to Hawai'i for conventions, corporate or association meetings, incentive award travel, or to conduct business in Hawai'i) contributes to an overall increase in visitor expenditures, since these visitors spend more per person per day than leisure visitors (except on activities, where leisure visitors spend more). In 2002, business visitors from the U.S. West spent 20.5% more than their leisure counterparts; for the U.S. East the premium for business visitor spending is 30.5%; and for Japan the premium is an additional 4.7% in spending. Additionally, business meetings account for expenditures beyond those accounted for by individuals, since business meetings often require staging, rentals, transportation, and other business services. To attract higher spending business visitors, Hawai'i must create marketing programs that appeal to both the leisure and business market segments.



Hawai'i Convention Center, O'ahu

The Hawai'i Convention Center (HCC), which opened in 1998, provides Hawai'i with an important asset to compete in the lucrative convention market. This market has been affected by geopolitical forces and regional customer confidence. Changes in the way associations, corporations, planners and executives are managing business have significantly

affected how the HCC engages potential clients. According to HCC's managers, SMG, the economic viability of associations, corporate mismanagement and an economy of limits directly impact Hawai'i more severely than competition from other meeting destinations in the contiguous 48 states (although the growth of large hotels with comparable-sized meeting spaces are of concern as well).

- ***Competitive environment for travel and tourism has become very intense.*** Florida funded an \$80.7 million tourism program in 2002-2003, of which \$23.2 million was spent in advertising. Las Vegas had a total tourism budget of \$160 million in 2002, of which \$60.1 million was spent in advertising. In contrast, the total tourism budget for the HTA in 2004 is \$61 million, of which \$34 million is spent on leisure marketing, \$8 million is spent on meetings marketing, and \$8 million is spent on sports marketing. In response to this intensely competitive environment, marketing programs for Hawai'i must be carefully targeted and utilize cooperative programs with industry partners when appropriate.
- ***Hawai'i has suffered from business downturns in the past because it was too reliant on a few markets.*** Any single market can be affected by economic downturns, currency fluctuations or other disruptions. Historically, individual markets have been adversely affected by long-term trends (such as the decline of the Japan market from 2.2 million visitors in 1997 to 1.3 million visitors in 2003) as well as short-term disruptions (such as the impact on the North America market when United Airlines went on strike or when DC-10 aircraft were grounded). In addition, recent events have demonstrated the fragile nature of the visitor industry. Terrorist attacks, health crises, political and economic changes, transportation

disruptions and other challenges are a constant threat, even if these incidents occur outside of Hawai'i. While specific occurrences are impossible to anticipate, Hawai'i must plan for catastrophic events by creating contingency plans and maintaining a high degree of flexibility in its programs.

- ***Different geographic markets have different conditions and needs.*** To appeal to different geographic markets, the HTA (on behalf of the State) has defined major market areas (MMAs) based on visitor characteristics, state of market development, and competitive environment. The following are the State's MMAs:

1. U.S. West (9 Western States)
2. U.S. East (all remaining States)
3. Japan
4. Canada
5. Europe
6. Latin America
7. Other Asia (outside of Japan)
8. Oceania (Australia/New Zealand)
9. Other

The MMAs represent geographic areas around the world that have roughly similar travel characteristics. In the recent past, visitor statistics, particularly visitor spending patterns have been measured for each MMA. Marketing budgets for each MMA are based on obtaining the highest return on investment (in terms of visitor expenditures), not just arrivals.

- ***Need to balance statewide and island specific marketing programs.*** In Hawai'i's development as a destination, well-established markets like the U.S. West and Japan have become very familiar with the State's name and image. Each of Hawai'i's main islands has established marketing organizations, which have developed island-specific marketing programs that fit within the

State's overall marketing efforts. The growth of direct flights from source markets to individual neighbor islands has increased the tendency of some visitors to consider their destination to be a specific island rather than Hawai'i as a state. Each of Hawai'i's islands possesses unique characteristics and strengths, which contribute to the continuing appeal of Hawai'i as a destination. In some market areas, however, detailed consumer knowledge of Hawai'i is relatively low and marketing the State as a destination is a priority. Marketing plans must clearly identify and balance the scope and role of island-specific and statewide marketing programs in order to maximize marketing efficiency.

- ***Coordinating marketing with product development programs is critical for well-planned development.*** The sustainable development of Hawai'i as a destination requires the continued self-evaluation and development and communication of relevant attractions, activities and experiences. Development of new markets (such as health and wellness, nature, weddings and romance, etc.) are especially dependent on product marketing that fits the travel needs of these special interest consumers. In addition to *brand* marketing (which establishes the destination's identity), Hawai'i marketing will support *products* targeted to specific, high-spending market segments. To be effective, product marketing requires close coordination between the State's marketing and product development groups, contractors, and industry partners.

STRATEGIC DIRECTIONS

Through effective and collaborative efforts (within HTA and with contractors and the private sector), marketing programs will be designed to attract leisure and business

travelers who contribute to increasing visitor spending and length of stay. To accomplish this, the following objectives have been established:

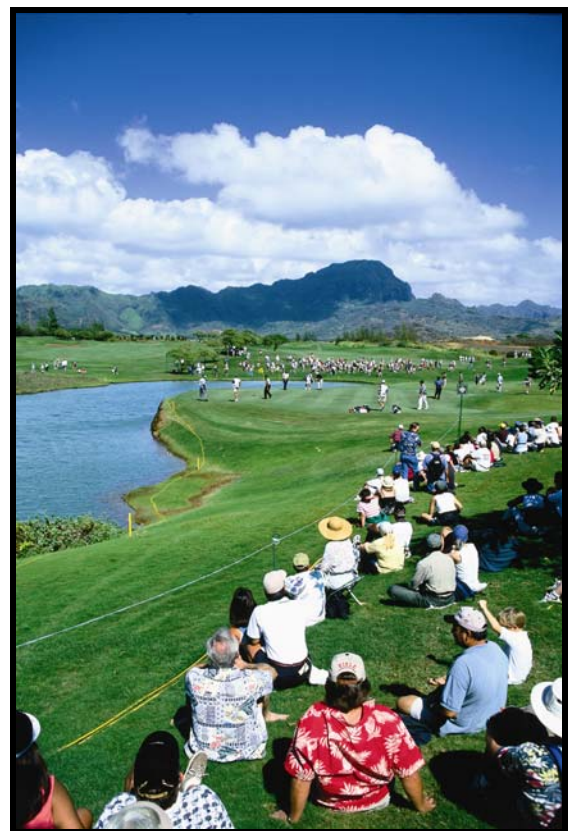
1. Increase the percentage of total business visitor expenditures by:

- a. Growing the meetings market by focusing marketing efforts on carefully selected target customers who are suitable prospects for off-shore meetings in Hawai'i's hotel and Convention Center facilities.
- b. Developing and implementing a plan to optimize and grow utilization of the Hawai'i Convention Center.
- c. Creating a "dual brand" for Hawai'i so that a compelling business image coexists with Hawai'i's successful leisure travel brand.
- d. Utilizing trade events, promotions and direct sales as the primary means to engage with prospective customers.
- e. Conducting a critical assessment of competitive destinations and facilities to determine strengths and weaknesses and to incorporate those findings into marketing messages.

2. Narrowly target marketing efforts with a focus on Hawai'i's best prospects to counter competitors' larger marketing budgets by:

- a. Developing a brand image that portrays Hawai'i as a one-of-a-kind destination with a unique culture and a variety of experiences.
- b. Developing annual marketing programs based on solid research, and targeting demographic and lifestyle groups who have the means and the desire to fully experience all that there is to see, do and experience in Hawai'i (see also *Research and Planning*).
- c. Promoting Hawai'i product offerings (e.g. golf, weddings/romance, arts and culture, etc.) that provide unique and

- relevant travel experiences for special interest and higher spending visitors.
- d. Focusing marketing programs on a limited number of consumer interest areas (or "vertical markets") to achieve effective marketing support in those areas that are most likely to contribute to the goal of increasing visitor expenditures.
- e. Evaluating prospective vertical markets (such as golf) based on market size, consumer spending, accessibility, and the distinctiveness of Hawai'i's product offerings (see also *Research and Planning* and *Tourism Product Development*).
- f. Developing and supporting sports events that can establish Hawai'i as a world-class venue and generate media exposure for the destination, and those that may not have media but can assist in leveling out shoulder periods.



MasterCard PGA Grand Slam of Golf
Championship Tournament
Poipu Bay Resort Golf Course, Kaua'i

3. Provide for stability in the visitor industry by:

- a. Developing a “portfolio” of source markets that will minimize the negative impacts of disruptions in any single market.
- b. Creating programs (such as sporting events and major festivals) that generate additional support in traditional “shoulder” seasons (spring and fall).
- c. Developing marketing programs that are responsive to the market conditions of shoulder periods.
- d. Supporting programs that promote sustainable airlift (see also *Access*).
- e. Developing marketing programs that continue to attract first time visitors to Hawai'i. (In 2003, approximately 38% of all visitors were first-time visitors. Maintaining a significant percentage of first-timers in the visitor mix supports the continued health of the destination.)
- f. Addressing the kama'āina visitor in marketing programs.
- g. Developing contingency plans and incorporating flexibility into marketing programs.

4. Tailor marketing efforts to address differences between MMAs by:

- a. Allocating marketing resources and identifying performance measures based on an assessment of their return on investment (defined by visitor expenditures) and long term potential for development.
- b. Regularly measuring consumer attitudes and behavior through objective research and conducting regular assessments of marketing programs both internally and through input from stakeholders (see also *Research and Planning*).



ITB Trade Show, Berlin, Germany

5. Coordinate statewide and island specific marketing efforts by:

- a. Coordinating and balancing statewide and island-specific marketing programs, and improving collaboration between HTA, its contractors, and the private sector to generate cooperative funding and to synchronize marketing efforts.

6. Coordinate marketing and tourism product development efforts to maximize performance by:

- a. Facilitating close coordination and collaboration between all stakeholders (see also *Tourism Product Development*).

STRATEGIC FRAMEWORK: MARKETING

GOAL

To develop marketing programs that contribute to sustainable economic growth.

OBJECTIVES

- Increase the percentage of total business visitor expenditures.
- Narrowly target marketing efforts with a focus on Hawai'i's best prospects to counter competitors' larger marketing budgets.
- Provide for stability in the visitor industry.
- Tailor marketing efforts to address differences between MMAs.
- Coordinate statewide and island specific marketing efforts.
- Coordinate marketing and tourism product development efforts to maximize performance.

Lead:	Government: Hawaii Tourism Authority and its marketing contractors Private Sector: Visitor industry businesses and organizations
Supporting Groups/Agencies:	Office of the Governor; Department of Business, Economic Development and Tourism; other government agencies including the counties; tourism product development organizations and businesses; other private businesses
Measures of Success:	Specific to issues related to marketing, the following measurements provide an indication of success: <ul style="list-style-type: none"> • Increases in business spending and leisure spending • Appropriate and desirable business and leisure traveler mix by MMA and desirable first-time and repeat visitor mix by island is determined with input from the island chapters and industry • Visitor spending shows annual increases • Statewide and island-specific marketing resources reviewed and reallocated annually to maximize performance in each MMA • Consistent increases in scores for intention to travel to Hawai'i and comprehension of Hawai'i's key attributes • Maintaining shares of first-time visitors • Increasing arrivals/expenditures during shoulder seasons • Improved satisfaction level of visitors • Growth in the meetings market

STRATEGIC INITIATIVE: NATURAL RESOURCES

GOAL: To respect, enhance and perpetuate Hawai'i's natural resources to ensure a high level of satisfaction for residents and visitors.

BACKGROUND

Hawai'i's diverse array of natural resources such as parks, beaches, trails, and waterfalls are unique attributes that make the Islands a wonderful place for residents to live and an attractive destination for tourists to visit. However, the beauty of these attributes has led to increased demand for recreation and tourism-related activities by visitors and residents. According to the *Hawaii State Parks Survey* conducted in 2004, State parks are visited by an estimated 9.2 million users each year, of which 69% are out-of-state visitors (6.3 million) and 31% are residents (2.9 million). While these statistics are for State parks alone, a similar trend of increasing usage is also evident at other sites including less frequented resources such as Natural Area Reserves, Forest Reserves, difficult-to-access beaches, and hiking trails. In addition to usage, there are other factors such as signage, parking, accessibility and other amenities (e.g., restrooms, concessions) that impact the overall quality and condition of each natural resource site in Hawai'i. To continue to provide areas to recreate for residents and visitors alike, natural resource sites need to be maintained, and in some cases, restored.

CRITICAL ISSUES

- ***The condition of manmade facilities detracts from the experience at natural resource sites.*** According to the *State Parks Survey*, overall, State park users rate their experience highly – 8.5 on a 10 point scale, with 1 representing “not satisfied” and 10, “outstanding.” However, the survey found that park users are

generally more highly satisfied with the natural elements of State parks (for instance rating “scenic views” 9.1), than with “value-added attributes” (between 5.5 and 6.5 for food concessions, restrooms and security). While out-of-state visitors rate State parks higher than residents, both segments were found to be equally dissatisfied with restroom facilities and food concessions. Continued levels of dissatisfaction with these two types of facilities can lead to decreases in both visitor satisfaction levels and residents’ quality of life.

While nearly every natural resource site frequented by visitors needs major improvements, HTA's *Natural Resource Assessment* (2004) reported on priority improvements at 23 key sites that were deemed critical to satisfaction levels.

- ***There are competing demands for decreasing financial resources.*** While natural resource sites and man-made facilities are in need of upkeep and restoration, the State as a whole has not “reinvested” in one of Hawai'i's key attributes. For example, over the past decade, the Hawai'i State Department of Land and Natural Resources' (DLNR) budget alone has decreased 30%, from over \$35 million in 1993 to \$24.5 million in 2003 in General Fund appropriations. At the same time, DLNR's scope of responsibility has increased. These added responsibilities reduce monetary resources for land acquisition, planning, improvements and maintenance. Similar programs at the county, federal and private levels have experienced increasing

needs and decreasing resources. In addition, the advent of invasive species poses a growing threat to Hawai'i's natural environment, especially in light of limited resources.

- ***Even when funds and personnel are put to park and resource maintenance, other challenges arise.*** Clearly, there are even greater priorities (Americans with Disabilities Act – ADA – accessibility and Environmental Protection Agency standards) than park maintenance, which detract from the funding of restroom repair and/or replacement. Another challenge has been that when improvements such as restroom renovations are made, sometimes the renovated facility is vandalized or destroyed immediately. As a result, park managers must spend their budgets on addressing vandalism instead of general maintenance and repair of facilities.
- ***Improved coordination and collaboration are needed to leverage resources.*** With limited financial and human resources among State, county, federal and private agencies and organizations, maintaining either remotely located natural resources sites or sites that could be better maintained by another agency reflects the need for better coordination and partnerships. For instance, the road through Waimea Canyon State Park is maintained by the Hawai'i State Department of Transportation and is well-paved. However, once the road enters Kōke'e State Park, the roadway surface is in poor, almost dangerous condition. Clearly, one agency is better suited to maintaining roads than the other. A successful example of interagency coordination was the turnover of the "Magic Island" portion of Ala Moana Park from the State to the City and County of Honolulu.

- ***Increasing usage of sensitive natural resource sites is a cause for concern.*** In an effort to have a unique and memorable experience, travelers are seeking out more isolated, less frequented, "secret" spots. Many of these areas are private lands prohibited to the public; are dangerous for the general public to access; or are culturally, environmentally and/or historically sensitive. (It should be noted that to many residents in Hawai'i, there is little or no distinction between natural and cultural resources.) Increased use of these areas will increase conflict between the needs of residents, visitors and resources.
- ***There are increasing numbers of tour activities in natural resource areas.*** There are many activity providers that are interjecting visitors to previously less-visited natural areas without providing adequate and appropriate education, causing competition with resident users, damaging the natural resources, and putting visitors at risk for health and safety concerns.

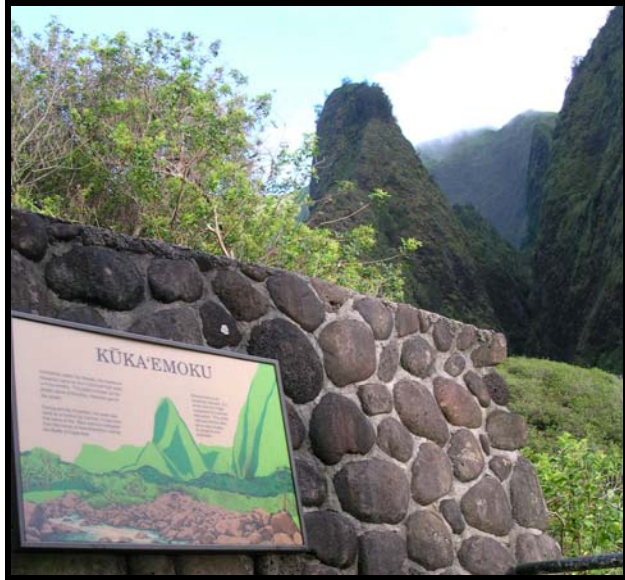
STRATEGIC DIRECTIONS

Hawai'i's natural environment is recognized as a very special and unique asset. However, the growing demand for its use by recreational activities is creating capacity and quality issues. Due to limited financial resources, however, the focus for the improvement of natural resources should not be on developing new "products" that would compete for the same sources of funding, but on improving existing facilities and resources. Therefore, the strategic planning for this initiative identifies the following objectives:

1. ***Improve value-added amenities at natural resource sites*** by:
 - a. Implementing improvements for priority sites frequented by visitors including interpretative and

directional signage, restroom and parking improvements, and other similar developments.

- b. Contracting private food and other concession activities to provide services at public sites.



Īao Valley State Monument, Maui

2. Explore innovative means to repair, maintain and improve Hawai'i's natural resources by:

- a. Seeking additional sources of public and private funding to maintain and improve Hawai'i's natural resources, including controlling invasive species.
- b. Exploring alternative funding sources such as entry and user fees (that would be used at the source from which they are generated), private donations, and leasing of more public lands to private entities at market rate.
- c. Exploring incentives to private landowners to provide the impetus for making private resources open and accessible to the public.
- d. Establishing more park concessions (where appropriate) to provide amenities and services, to provide on-site "security", and to provide maintenance of restrooms and trash receptacles.

3. Raise awareness of all stakeholders about the responsible use of natural resources by:

- a. Encouraging environmental stewardship and the efficient use of resources by educating all stakeholders on water and energy conservation practices, recycling, controlling the spread of invasive species, and other prevention programs.
- b. Supporting efforts that encourage a sense of pride and ownership in Hawai'i's natural resources such as providing signage that describes the natural, cultural and historic value of an area (see also *Hawaiian Culture*).
- c. Expanding adopt-a-park (or trail or beach) programs or developing educational programs on the proper protocol for access to and care of certain sites.
- d. Enhancing security efforts (e.g., increased personnel, surveillance cameras and gates) to deter vandalism are other efforts for encouraging responsible use (see also *Safety and Security*).
- e. Providing accurate and responsible information to visitors about safety conditions of hiking trails, beaches and other visitor sites via public sources including websites, vacation planners, in-room videos, and warning signage to counter inaccurate information about health and safety issues in Hawai'i (see also *Safety and Security*).
- f. Providing interpretive and hospitality training for managers and staff of natural resources (see also *Hawaiian Culture*).
- g. Monitoring the impact of cruise ships and ferries on marine resources and the potential for the spread of invasive species.



North Shore of Lānaʻi

4. Increase collaboration among government agencies, the visitor industry and the community by:

- a. Encouraging interagency programs such as the park exchange programs between State and county agencies or among State departments for improved maintenance of resource sites.
- b. Encouraging public-private community programs such as volunteer programs to leverage limited resources and improve maintenance of resource sites.
- c. Identifying ideal visitation numbers for natural resource sites at the county-level during the preparation of the county tourism strategic plans.

5. Raise awareness of commercial operators, information providers and others about the responsible use of natural resources by:

- a. Providing education and training programs that include accurate information on the natural, cultural and historic significance of various sites, and the proper protocol for access to and care of certain sites (see also *Communications and Outreach*).
- b. Providing signage that describes the natural, cultural and historic value of an area (see also *Hawaiian Culture*).
- c. Expanding enforcement efforts to apprehend and prosecute those who do not obtain proper permits or who damage such resources.

6. Review and enforce rules and develop certification programs for commercial operations in natural resource areas by:

- a. Reviewing existing rules and developing certification programs which include requirements for adequate environmental and cultural knowledge for activity providers (see also *Hawaiian Culture* and *Workforce Development*).
- b. Providing accurate information on natural resource sites (see also *Safety and Security*).
- c. Protecting access to or even totally restricting access to sites that are deemed critical (see also *Hawaiian Culture*).

STRATEGIC FRAMEWORK: NATURAL RESOURCES

GOAL

To respect, enhance and perpetuate Hawai'i's natural resources to ensure a high level of satisfaction for residents and visitors.

OBJECTIVES

- Improve value-added amenities at natural resource sites.
- Explore innovative means to repair, maintain and improve Hawai'i's natural resources.
- Raise awareness of all stakeholders about the responsible use of natural resources.
- Increase collaboration among government agencies, the visitor industry and the community.
- Raise awareness of commercial operators, information providers and others about the responsible use of natural resources.
- Review and enforce rules and develop certification programs for commercial operations in natural resource areas.

Lead:	<p>Government: County, State, Federal and private land management agencies and organizations (e.g., Department of Land and Natural Resources, Department of Parks and Recreation, National Parks Service)</p> <p>Private Sector: Nature tourism activity providers; private landowners</p> <p>Community: Environmental organizations (e.g., Hawaii Ecotourism Association, The Nature Conservancy)</p>
Supporting Groups/Agencies:	Office of the Governor; legislature and county councils; Hawaii Tourism Authority; other government agencies; other activity providers; residents; visitors
Measures of Success:	<p>Specific to issues related to natural resources, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Increased level of funding for the management of Hawai'i's natural resources in State and county budgets • Cleaner and well-maintained restrooms at targeted natural resource sites • Safer access and adequate paved parking at targeted natural resource sites • Improvements (quality and quantity) in park concessions (where appropriate) • Improved levels of resident satisfaction with Hawai'i's natural resource sites • Improved levels of visitor satisfaction with Hawai'i's natural resource sites

STRATEGIC INITIATIVE: RESEARCH AND PLANNING

GOAL: To perform collaborative research and planning for use in the development of programs, policies and plans that will positively contribute to the State's economy, benefit the community and sustain Hawai'i's resources.

BACKGROUND

Tourism is a complex, multi-faceted industry that encompasses a diverse range of products and services for visitors. As the leading industry in Hawai'i, tourism touches nearly every business, government agency and individual (directly or indirectly) in the State, and as such, it affects and is affected by a broad range of programs, planning and policy decisions including those related to: employment, transportation, infrastructure, taxation, trade exports, business development, land use and the environment. Research and planning is critical to the success and sustainability of Hawai'i's visitor industry and the quality of life for Hawai'i's residents and visitors.

To ensure that Hawai'i remains a quality visitor destination and the "best place to live and work," the State must take a proactive approach to tourism. Specifically, a sound research base is critical to ensure that proper planning is done to guide the development of tourism programs, policies and plans that will benefit the State and its community.

CRITICAL ISSUES

- **Ever-changing events and trends impact tourism.** Examples of new developments that have arisen which must be addressed include:
 - emerging trends in the airline industry;
 - aging hotel inventory and conversion of some

- accommodations to timeshares and condominiums;
- growth of resort residential development;
- tightening affordable housing and housing shortage for resident workforce;
- expansion of alternative accommodations (e.g., new timeshares, vacation rentals, bed and breakfasts and); and
- growth of the cruise industry.

With such importance to the State, Hawai'i's visitor industry must perform ongoing research to identify and understand the impacts and benefits of emerging trends and developments before they happen, establish appropriate policies to address these impacts and develop long-range plans to manage these changes.

- **Tourism research is conducted by various entities but not often coordinated or shared.** Visitor statistics play a significant role in the development of tourism. They address current conditions by providing benchmarks, help to establish targets and indicators of success, and provide guidance for policy makers. How much visitors spend, where they come from and what they are looking for, are some examples of the types of visitor information needed to ensure that government formulates appropriate programs, policies and plans related to marketing, airlift, infrastructure, natural resources, incentives, and other issues.

Current and accurate visitor statistics are valuable to the visitor industry, business sector and community groups to support their business forecasting, investment planning and decision-making. Hawai'i must more fully utilize existing research and conduct new studies to gain a clearer picture of where the visitor industry stands currently and where it should move towards for the future.

- ***Current methods do not always capture true public opinion.*** Accurate information (based on sound research) and feedback from the various stakeholders are the two primary elements needed to develop public policies that benefit the State and its people. In Hawai'i, everyone is a stakeholder in tourism – residents, private businesses, government agencies and visitors. As such, everyone must have the opportunity to provide feedback on tourism to ensure that policy-makers develop programs and plans that reflect the needs and desires of all. Diversification of methods to garner stakeholder input, such as public hearings, community focus group sessions and resident surveys, is important to ensure a more accurate reflection of all stakeholder opinions.
- ***County-specific strategic plans to address the visitor industry are not available.*** While State plans in the past have been established to manage Hawai'i's visitor industry, comprehensive county plans have not been developed. With more focus on the individuality of each county – in terms of attributes and weaknesses as well as resident needs and desires – such plans are needed in coordination with an overall statewide strategic plan for a sustainable tourism industry.

STRATEGIC DIRECTIONS

All stakeholders must take an active role in long-range planning for tourism to ensure that Hawai'i remains a quality visitor destination and a great place to live and work. As such, the strategic planning for this initiative identifies the following objectives:

1. ***Identify, monitor and address tourism trends, including their impacts and benefits on the State and each community*** by:
 - a. Continually monitoring and analyzing industry issues, trends, competition, benefits and impacts (global, national and local) to anticipate and effectively react to such changes in a timely manner (see also *Marketing*).
 - b. Obtaining current and accurate visitor statistics (global, national and local) on an ongoing basis.
 - c. Developing long-range plans, programs and policies, based on current and timely research efforts to attain the vision for Hawai'i's visitor industry.
 - d. Developing contingency plans or "crisis plans" to ensure that the tourism industry can quickly adapt to major global, national and local events (see also *Marketing*).
2. ***Improve, coordinate and share tourism research among the various entities*** by:
 - a. Supporting collaborative research (global, national and local) and strategic planning to ensure that services and products throughout the State are able to accommodate the needs of both residents and visitors.
 - b. Sharing research information between all entities and instituting additional or improved research efforts as needed.
 - c. Fully utilizing available research and developing new studies to provide comprehensive data necessary for

proactive planning, program and policy development.

3. Encourage participation in tourism planning and public policy development by all stakeholders by:

- a. Seeking feedback through ongoing community meetings, surveys, online input gathering, and other innovative approaches to ensure that research reflects the needs and desires of all stakeholders (see also *Communications and Outreach*).

- b. Initiating collaboration among State, counties and community groups regarding priorities for public funding for construction, maintenance and improvements.

4. Develop and implement county tourism plans by:

- a. Using this *TSP* as a foundation for further discussion with each county to develop county-specific plans.
- b. Developing a collaborative process for each island to gather input and set direction for the visitor industry at the county, island, or community level (see also *Communications and Outreach*).



Recent Tourism Studies Conducted

STRATEGIC FRAMEWORK: RESEARCH AND PLANNING

GOAL

To perform collaborative research and planning for use in the development of programs, policies and plans that will positively contribute to the State’s economy, benefit the community and sustain Hawai’i’s resources.

OBJECTIVES

- Identify, monitor and address tourism trends, including their impacts and benefits on the State and each community.
- Improve, coordinate and share tourism research among the various entities.
- Encourage participation in tourism planning and public policy development by all stakeholders.
- Develop and implement county tourism plans.

Lead:	Government: Hawaii Tourism Authority; Department of Business, Economic Development and Tourism; University of Hawai’i – School of Travel Industry Management
Supporting Groups/Agencies:	Office of the Governor; other government agencies including the counties; visitor industry organizations and businesses; community organizations; residents; visitors
Measures of Success:	<p>Specific to issues related to research and planning, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Action plans by various agencies based on this plan are prepared, updated and coordinated with other agencies on a regular basis • County tourism plans are prepared, updated and coordinated with other agencies on a regular basis • Emerging issues and trends (global, national and local) are identified and analyzed, and appropriate measures and solutions are recommended • Research (public and private) is shared among public and private partners • Stakeholder feedback is obtained through diversified means • Exit surveys of visitors indicate satisfaction

STRATEGIC INITIATIVE: SAFETY AND SECURITY

GOAL: To achieve a safe Hawai'i visitor experience.

BACKGROUND

Hawai'i's attractiveness as a leisure destination is highly dependent on the perception that it provides a safe and secure environment for visitors and residents. An increase in crime against visitors to Hawai'i or even the perception of such an increase, and the resultant negative publicity about the destination can adversely impact future visitor arrivals and expenditures. This in turn impacts both the tax revenues that support public facilities and services (e.g., health, police and education), as well as the visitor industry jobs that support Hawai'i's residents' livelihood and quality of life.

In 2002, Hawai'i ranked 41st in the U.S. in terms of the rate of violent crimes but second for property crime. Of all offenses listed in *The State of Hawaii Data Book 2003*, produced by the Hawai'i State Department of Business, Economic Development and Tourism, 96% of the offenses are classified as burglary, larceny-theft, or motor vehicle theft. The Hawai'i State Department of the Attorney General released its annual Uniform Crime Report, *Crime in Hawaii*, which shows that the State's Index Crime rate fell 8.9% in 2003. The decrease was primarily attributable to a sizable decrease in the City & County of Honolulu.

The *2002 Visitor Satisfaction & Activity Report* found that most of the U.S. West (93.8%), U.S. East (93.6%), Japanese (94.3%), Canadian (91.6%) and European (92.7%) visitors surveyed experienced no problems while in Hawai'i. Of the small number of visitors who reported problems, the solicitation by drug dealers was most frequently mentioned. The second highest

issue reported was having wallets/purses/valuables stolen. Car theft and break-ins are among the most frequently reported problems for *both* residents and visitors, while larceny is the most common type of "serious" crime and the source of the clearest distinction between visitor and resident self-reported crime on crime victimization surveys.

The terrorist attacks of September 11, 2001 have resulted in increased security procedures at airports and harbors and have made traveling less convenient. Stricter travel policies and concerns for personal safety and convenience have reduced leisure and business travel throughout the world.

CRITICAL ISSUES

- **People on vacation tend to be less cautious.** Many visitors let their guard down while on vacation and can inadvertently expose themselves to dangerous situations. With the recent trend of visitors seeking isolated and secret locations suggested by tourist publications and websites, visitors increase their risk for crime and accidents.
- **The fight against crime is hampered by limited resources.** Law enforcement agencies need adequate resources and the support of tougher sentencing laws to ensure that repeat criminals will be kept off the streets. The physical presence of law enforcement officials or other measures also help to deter crime, and can help lead to the arrest and conviction of criminals. However, limited resources have hampered attempts to provide these services, and in some communities

heavily impacted by tourism, police resources are limited by staffing based solely on the number of full-time residents (versus residents *and* visitors) in the district.

- **Global conditions dictate increased surveillance and other security measures.** Terrorist events like the September 11th attacks, health crises like SARS, and other similar emergencies point to a need for increased vigilance and security at all ports of entry, major sites and potential targets.
- **Increases in drug use and solicitation impact visitor expenditures.** Increased drug use, especially of crystal methamphetamine or “ice,” is impacting crime and worker productivity levels. An article on crime in *The Honolulu Advertiser* (August 22, 2004) notes that the “[p]olice acknowledge that Honolulu is one of the safest cities in the country when it comes to violent crime, and blame widespread theft and other property crimes on the state’s drug problem.” Eighty percent of violent crimes and domestic violence in Hawai’i are ice-related. The solicitation by drug dealers can negatively impact a visitor’s experience, as noted in visitor satisfaction surveys.
- **Despite our best efforts, crime, accidents or other emergencies occur.** Programs and services to assist visitor victims of crimes, medical emergencies, natural disasters or other adversities are important, as it is impossible to prevent all accidents and crimes from occurring. Coordination between various agencies is needed to anticipate and react to such situations, aid victims and avoid potential negative publicity for Hawai’i.

STRATEGIC DIRECTIONS

Personal safety and security will continue to be a major criterion in selecting a destination for leisure as well as business travel. As such, the strategic planning for this initiative identifies the following objectives:

1. **Prevent crime and other adversities by educating visitors, residents and industry workers about the potential risks to health and safety** by:
 - a. Providing accurate and responsible information via public sources including websites, vacation planners, in-room videos, and warning signage to counter inaccurate information about health and safety issues in Hawai’i (see also *Communications and Outreach*).
 - b. Developing proactive, educational programs for visitors and residents about safety.
 - c. Establishing safety education and rescue training programs for those working in the visitor industry so that they can provide accurate information to visitors about safety conditions of hiking trails, beaches and other visitor sites, and quickly address accidents should they occur (see also *Workforce Development*).



Warning Signage
 (Prototypes provided by the Hawai’i State Department of Land and Natural Resources)

2. Support and strengthen criminal deterrence and law enforcement efforts by:

- a. Increasing funding to ensure a larger and stronger police presence in tourist areas.
- b. Supporting increased use of marked cars or bicycle patrols in heavy visitor areas.
- c. Developing crime deterrence measures such as warning signage, fixed camera systems, and other security systems in parks or scenic areas with high visitor counts to more effectively deter illegal activities.
- d. Encouraging the collaboration between the visitor industry, government agencies and others to advocate to the appropriate bodies for: 1) strengthened laws and ordinances; 2) more resources for law enforcement personnel; and 3) more resources for other personnel involved in the legal system to ensure that criminals are dealt with in a timely manner.
- e. Providing police and other law enforcement agencies with hospitality training, including instruction on foreign languages, culture and protocol, to better assist all visitors who are victims of crime.
- f. Encouraging volunteer programs that enlist residents and businesses such as community policing and neighborhood watch programs for parks, scenic areas, or other sites frequented by visitors (see also *Natural Resources*).

3. Implement required homeland security improvements at airports, harbors and other designated areas to ensure the safety of travelers and residents by:

- a. Providing sufficient resources to constantly monitor the situation and to ensure safe and secure passage through airports, harbors and other

transportation corridors and significant sites (see also *Access*).

4. Address drug abuse and other criminal activities by:

- a. Supporting programs that work to counter these types of activities (e.g., mandatory drug testing at the workplace, rehabilitation services and police presence in areas frequented by visitors).

5. Provide assistance to visitors who are victims of crimes, accidents, and other emergency situations or adversities by:

- a. Supporting statewide visitor assistance programs such as the Visitor Aloha Society of Hawai'i (VASH) and its counterparts in each county.
- b. Increasing coordination and support between law enforcement agencies, medical organizations, private industry, and visitor assistance groups to expedite and improve services to residents and visitors.
- c. Continuing monitoring and preparation efforts to ensure that Hawai'i is prepared for any emergency disasters (e.g., conduct annual review and update of the various crisis management plans, coordinate and communicate among those involved in executing the various plans, and schedule training sessions and practice drills on a regular basis).

STRATEGIC FRAMEWORK: SAFETY AND SECURITY

GOAL

To achieve a safe Hawai'i visitor experience.

OBJECTIVES

- Prevent crime and other adversities by educating visitors, residents and industry workers about the potential risks to health and safety.
- Support and strengthen criminal deterrence and law enforcements efforts.
- Implement required homeland security improvements at airports, harbors and other designated areas to ensure the safety of travelers and residents.
- Address drug abuse and other criminal activities.
- Provide assistance to visitors who are victims of crimes, accidents, and other emergency situations or adversities.

<p>Lead:</p>	<p>Government: Law enforcement agencies (e.g., police, judiciary, county prosecutors, Department of Land and Natural Resources – Division of Conservation and Resource Enforcement, Transportation Security Administration)</p> <p>Private Sector: Security industry; private businesses</p> <p>Community: Legal community; neighborhood watch organizations; visitor assistance programs (e.g., Visitor Aloha Society of Hawaii)</p>
<p>Supporting Groups/Agencies:</p>	<p>Office of the Governor; legislature and county councils; civil defense agencies; Hawaii Tourism Authority; other government agencies (e.g., Department of the Attorney General); public and private landowners; residents; visitors</p>
<p>Measures of Success:</p>	<p>Specific to issues related to safety and security, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Reduction in the number and types of crimes against visitors • Reduction in the number and types of visitor-related accidents • Increase in the number of law enforcement personnel, resources and visibility in major resort areas • Visitor industry workforce properly trained in safety • Established crisis management plan for visitors

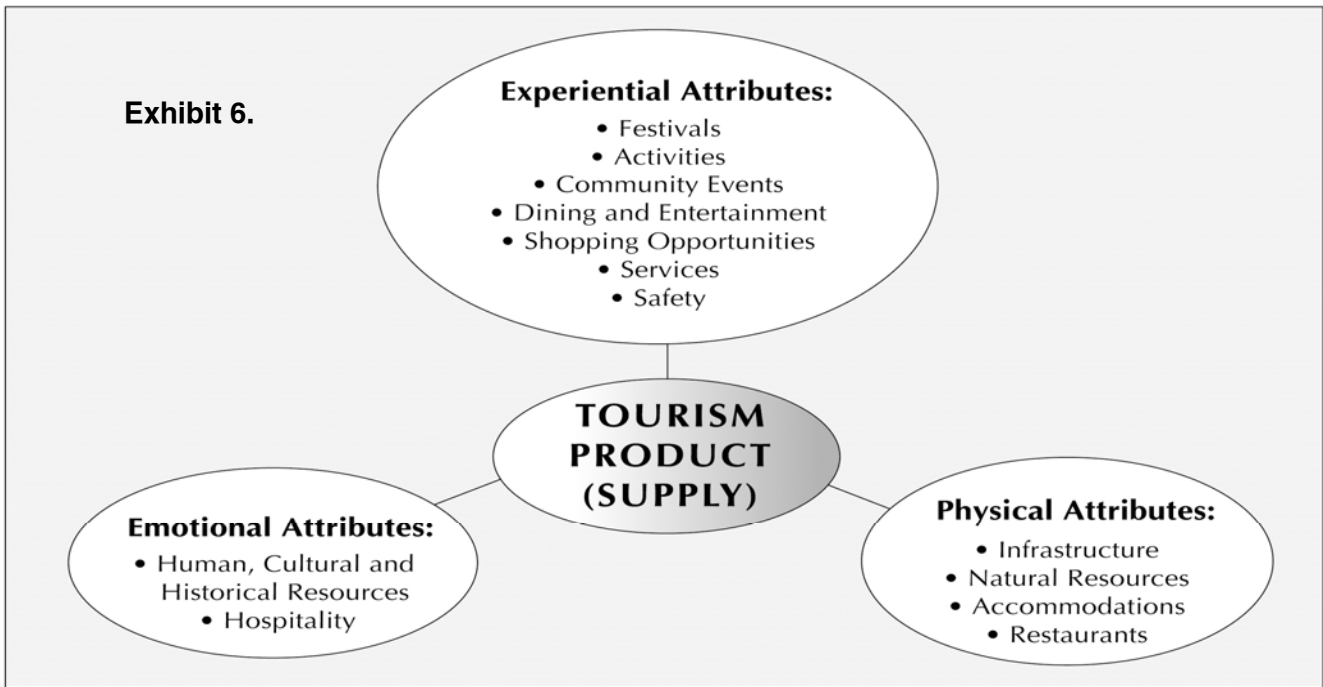
STRATEGIC INITIATIVE: TOURISM PRODUCT DEVELOPMENT

GOAL: To provide a diverse and quality tourism product unique to Hawai'i that enhances the Hawai'i visitor experience and enriches residents' quality of life.

BACKGROUND

The “tourism product” is comprised of all of the various elements – physical, experiential and emotional – that contribute to a destination’s experience. It includes the physical aspects such as natural resource areas frequented by visitors, accommodations, public infrastructure, utilities and attractions; the experiential facets such as visitor activities, festivals,

shopping and dining experiences, and community events; and the emotional components such as the diversity, history and spirit of a place and its people. For Hawai'i, this multi-cultural diversity is an intrinsic part of the visitor experience providing visitors with a taste of many different cultures of the world in one location. Exhibit 6 illustrates the range and diversity of the “tourism product.”



“Tourism product” development is an essential element of a State tourism strategy and will continue to play a vital role in the future growth of Hawai'i’s travel industry. In addition to improving the visitor experience, tourism product development efforts can

lengthen the time visitors spend in a destination, reduce peaks and valleys of seasonality, ease overcrowding of popular tourism resources, and add value to the existing product mix. Expanding the tourism product inventory can be a means of

encouraging repeat visitation or attracting new visitors, as well as a way to increase visitor expenditures.

In the latest *Hawaii Marketing Effectiveness Study (1st Quarter 2004) (Effectiveness Study)*, Hawai'i is rated on a variety of attributes including, but not limited to, "clean environment," "variety of types/cost places to stay," "intriguing culture/history," and "safe and secure." These are traits which Hawai'i must focus on improving, protecting and supporting, as they represent the characteristics which come into play as potential visitors make travel decisions. For Hawai'i's three largest markets – Western U.S., Eastern U.S. and Japan – on a scale of one to five with five being positive, Hawai'i is rated as follows:

Attribute	U.S. West	U.S. East	Japan
Clean environment	4.2	4.1	4.0
Variety of places to stay	4.0	3.9	3.7
Intriguing culture/history	3.8	3.7	3.8
Safe and secure	4.4	4.4	4.3

Strong majorities in the 1999, 2001, and 2002 *Resident Sentiment Surveys* have supported: 1) more expenditures to "create new" parks and other attractions for both residents and visitors; 2) more money to "restore and sustain" these types of parks and attractions; 3) more money to improve infrastructure "in tourist areas;" and 4) using a significant amount of tourism tax revenues for both public improvements in tourism areas and "cleaning up the environment." Overall, residents are supportive of those activities that improve the tourism product. These enhancements also tend to improve the overall "quality of life" in Hawai'i.

Some elements of Hawai'i's tourism product – "Access," "Hawaiian Culture," "Natural Resources," "Safety and Security," and "Workforce Development" – are addressed as separate initiatives as they have been identified as needing specialized attention.

Thus, while recognizing that the tourism product consists of many elements, the focus here is on strategies relating to private infrastructure such as accommodations and attractions, and to the diverse experiential activities offered to visitors in Hawai'i.

CRITICAL ISSUES

- **Visitors, especially repeat visitors, want unique, diverse and quality experiences.** As visitors become more sophisticated and well-traveled, and as technology allows for greater ease of travel to long range destinations, visitors' demand for different and authentic experiences increases. In Hawai'i's case, the State's visitor mix includes about 60% of "repeat" visitors, some of whom have been to Hawai'i many times. Importantly, Hawai'i's visitors' satisfaction levels remain high.



Parade in Waikiki

According to DBEDT's *2002 Visitor Satisfaction and Activity Report*, in 2002, more than 96 percent of the U.S. West, U.S. East, Japanese, Canadian and European visitors surveyed rated their most recent Hawaiian vacation as "excellent" or "above average." However, they are also looking for new and unique experiences. Examples of "products" that fulfill visitors' interests include attending an event unique to Hawai'i such as the Aloha Festivals, meeting local residents at

a community fair, learning the history behind a particular site, and tasting Hawai'i's regional cuisine. This also provides opportunities for visitors to experience Hawai'i's diverse and multi-ethnic events and activities.

- ***Accommodations that meet or exceed customer expectations are essential for Hawai'i to remain competitive and meet its marketing targets.*** Hawai'i must have an adequate supply of hotels and other types of accommodations. In addition, the accommodations provided must be of the type and quality required to meet the needs of all market segments. With Hawai'i's focus on those segments which have higher per day and per trip spending, the destination must offer the type of accommodation necessary to attract higher-spending visitors across budget categories.
- ***Some of Hawai'i's physical amenities are in need of repair, rejuvenation or redevelopment.*** With visitors becoming more sophisticated and competing destinations developing exciting new hotels and attractions, keeping the major physical elements of Hawai'i's tourism product up-to-date, competitive and in line with visitor expectations is critical. Accommodations, attractions, restaurants, retail operations and the like face a tremendous challenge because of the commitment required to continually maintain and reinvest in a property when land, business and construction costs in Hawai'i are so high.

While Hawai'i offers a wide range of physical products for visitors and residents, and much work has been accomplished in recent years, few new products have been developed and many existing ones are in need of refurbishment. For instance, in some areas the hotel inventory is aging, and some of the visitor accommodations

are converting to timeshares and/or condominiums, reducing the available inventory.

While there is a sizable amount of investment and construction occurring, much of the activity involves new commercial development, new residential condominiums, and timeshares. All of the above represent opportunities for greater immediate returns on investment than, say, the room and food and beverage revenue that would be generated by a new hotel room.

- ***Visitors are focusing on specific interests and products in their destination planning decisions.*** Many visitors to Hawai'i were once content to bring home a good tan. As travelers become more sophisticated and with increased accessibility to other areas of the world, the State must attract visitors with specific interests by identifying key assets of Hawai'i that already exist and organizing and marketing those elements to targeted audiences. Opportunities abound for broadening Hawai'i's appeal by expanding existing or developing new niche products such as culture and the arts, sports, nature, agriculture, heritage and educational tourism. The potential for inter-industry promotions (e.g., agriculture and tourism) can be explored through combined business development strategies and marketing activities. Research efforts are needed to ensure that targeted niche products are in line with market needs and reach. Coordination and collaboration between product development and marketing efforts also becomes critical to address this change in Hawai'i's visitor industry.

STRATEGIC DIRECTIONS

Hawai'i's "tourism product" is a diverse range of product and service offerings provided by individual businesses, community groups, industry organizations, and government agencies. However, it must be constantly rejuvenated, renovated, and re-designed to continue to meet the needs and demands of the ever-changing traveler. It also should be noted that Hawai'i's "tourism product" is where we live. Therefore, the focus should be on improving the quality of life for residents with the assumption that what is good for residents, is good for visitors. The strategic directions identified to meet these "demands" include the following (see also *Access, Hawaiian Culture, Natural Resources, Safety and Security, and Workforce Development*).

1. **Develop new, and strengthen existing experiential visitor activities and products** by:

- a. Conducting ongoing research of current tourism product activities to determine Hawai'i's competitive position against other destinations, to assess the quality of these "products," and to identify appropriate activities and products to best meet Hawai'i's needs (see also *Research and Planning*).
- b. Supporting programs that attract visitors to Hawai'i to participate in or attend the activity (e.g., Aloha Festivals, Honolulu Festivals), that are unique to Hawai'i, portray our multi-cultural heritage, and provide opportunities for visitor-resident interaction.
- c. Enhancing existing and expanding new community-based, generally smaller programs, activities and events (such small scale ecotours, agricultural tourism, and heritage tourism activities) which provide resident-visitor interaction and boost

local community economic development, while supporting the development of targeted niche markets throughout the State and on a year-round basis (see also *Communications and Outreach*).

- d. Offering and marketing courses at colleges and universities to visitors (such as the Elderhostel program).



International Festival of Canoes 2003, Maui

2. **Develop new, and rejuvenate existing physical elements of the tourism product** by:

- a. Encouraging public and private entities and nonprofit trusts who oversee or own physical elements of Hawai'i's tourism product (e.g., hotels and attractions) to undertake improvements, renovations, and new developments to ensure a competitive, quality tourism product.
- b. Supporting those who undertake such efforts through tax incentives, land use and planning policies, public-private partnerships, access to venture capital, expedited permitting process, and other like programs.
- c. Developing new and improving existing systems to monitor quality and foster excellence in facilities and services.
- d. Supporting additional funding for the maintenance and protection of

natural resources areas frequented by visitors by considering natural resources as part of Hawai'i's overall "product" (see also *Natural Resources*).



Ala Wai, O'ahu (2004)



Ala Wai Rendering

3. Identify and support niche products with potential for successful market development by:

- a. Conducting research to identify appropriate niche products for development based on critical mass of quality products, market potential, ability to reach the target market through established marketing vehicles, and other similar criteria (see also *Marketing and Research and Planning*).
- b. Conducting research to identify and address barriers to the development of new product niches on an ongoing basis, such as land use laws that discourage agricultural tourism or soft-adventure tourism (see also *Research and Planning*).
- c. Encouraging collaboration between tourism product providers and those who market the State to work together to promote Hawai'i's unique and diverse product offerings through programs such as "Hawaii Arts Season" and "Kauai Festivals" (see also *Marketing*).

- d. Encouraging multi-industry development programs such as cooperative programs between Hawai'i's agricultural products and tourism, or using Hawai'i's culture and arts offerings to support tourism marketing.
- e. Developing research and setting policy regarding whether more products are needed, and whether existing products could or should be improved (see also *Research and Planning*).



Kauai Festivals 2002

STRATEGIC FRAMEWORK: TOURISM PRODUCT DEVELOPMENT

GOAL

To provide a diverse and quality tourism product unique to Hawai'i that enhances the Hawai'i visitor experience and enriches residents' quality of life.

OBJECTIVES

- Develop new, and strengthen existing experiential visitor activities and products.
- Develop new, and rejuvenate existing physical elements of the tourism product.
- Identify and support niche products with potential for successful market development.

Lead:	<p>Government: County agencies, State agencies, Hawaii Tourism Authority Private Sector: Visitor industry businesses (hotels, attractions, restaurants, retail) Community: Community groups and organizations</p>
Supporting Groups/Agencies:	Office of the Governor, legislature, business organizations, activity providers and other product development organizations and businesses, residents and visitors
Measures of Success:	<p>Specific to issues related to the tourism product, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Improved visitor satisfaction survey responses for specific products • Improved resident sentiment survey responses • Diverse product offerings spread throughout the State and throughout the year

STRATEGIC INITIATIVE: WORKFORCE DEVELOPMENT

GOAL: To ensure a sufficient and highly-qualified workforce that is provided with meaningful careers and advancement opportunities.

BACKGROUND

Tourism generates one out of every five jobs in Hawai'i, according to the Hawai'i State Department of Business, Economic Development and Tourism (DBEDT). Tourism provides jobs in hotels, restaurants, airlines, car rental companies, airport operations, security services, retail stores, entertainment and numerous operations that provide goods and services to travelers. In 2002, an estimated 160,787 civilian jobs statewide were supported directly and indirectly by visitor expenditures, accounting for 22.3% of the total jobs provided by the State's economy. As such, employees in tourism and related industries are critical to the success of Hawai'i's visitor industry.

This initiative - workforce development - identifies the need to ensure that there are sufficient education, training and advancement opportunities to prepare individuals, including and especially Hawai'i residents, for employment in the industry. Specifically, employees in the visitor industry must have the appropriate training to successfully do their job, as well as have opportunities for career advancement including managerial and entrepreneurial training. In addition, employers need a sufficient number of qualified and motivated workers, who will provide high levels of service to Hawai'i's visitors.

CRITICAL ISSUES

- **Ensuring a sufficient and qualified workforce.** As the economic mainstay of Hawai'i, tourism provides numerous and
- **Industry employees need ongoing training and career advancement**

diverse employment opportunities and requires a sufficient number of qualified workers. With respect to size, Hawai'i continues to lead the nation with the lowest unemployment rate (3.1% for June 2004). The industry's challenge is to maintain its existing workforce as well as continue to attract new workers. Related to this challenge, are quality-of-life issues for those who work in the industry such as affordable housing (renting and owning) and the cost-of-living in Hawai'i, especially given that many visitor industry jobs are part-time. Related to qualified employees, programs that provide residents with travel and tourism education and training are needed statewide. Currently, the Academy of Travel and Tourism (AOTT) program for high school juniors and seniors is offered at selected schools on Maui, Kaua'i and O'ahu. The University of Hawai'i's School of Travel Industry Management (UH TIM) and the University of Hawai'i's Community Colleges System (UHCC) provide college students on some islands with training and opportunities to work in the visitor industry, but are financially strained. Given present resources, these programs cannot be expanded to offer courses statewide. Hawaiian cultural training programs, such as the one developed specifically for tour bus drivers by UHCC, and programs that provide residents with language skills needed to work in the visitor industry must also be offered statewide.

opportunities. Hawai'i's visitor industry workforce is the "front line" to share Hawaiian values, such as *ho'okipa* and *aloha*, with all visitors. However, many employees, general managers and hotel owners lack sufficient knowledge and/or training about Hawaiian culture and Hawai'i in general (e.g., Hawai'i's people, the natural environment, language and protocol). Additionally, because Hawai'i receives visitors from all around the world, it is important that the workforce be properly trained to provide a high level of service to accommodate the diverse needs of various travelers, and respect the different cultural protocol.

Visitor industry employees also need career advancement opportunities, such as managerial and entrepreneurial training, to sustain the future success of tourism.

- **While career advancement opportunities are available, many are unaware of the possibilities.** Among many residents, there is the perception that tourism primarily offers only low-paying and unskilled jobs, with only a limited number of top-level positions filled by local residents. The *2002 Survey on Resident Sentiments* found that 65% of those surveyed agreed with the statement, "Most tourism jobs don't have much opportunity for advancement," and 61% agreed that "the best tourism jobs go to outsiders a lot more than to local people." The survey also revealed that some residents believe tourism employees work poor hours or only part of the year.

STRATEGIC DIRECTIONS

A highly qualified, educated and motivated workforce is essential to tourism, as visitors today come from a greater variety of countries, have higher expectations and have a number of vacations options. Residents must have training, education and

employment opportunities to work in the visitor industry, and employees must have training and career advancement opportunities available to keep them motivated and performing at a high level. Therefore, the strategic planning for this initiative identifies the following objectives:

1. **Provide an adequate source of quality workforce to support the needs of Hawai'i's visitor industry by:**

- a. Increasing collaboration and communication between the visitor industry and the educational institutions regarding tourism planning (industry needs) and human resource planning.
- b. Increasing communication, support and collaboration between the visitor industry, employee training providers (such as the Hawai'i State Department of Labor and Industrial Relations (DLIR) and private businesses), educational institutions (such as the UH TIM, UHCC, AOTT program and high schools), as well as labor unions.
- c. Strengthening educational programs to ensure graduates have strong business and financial analysis skills.
- d. Providing additional funding to established educational programs to enable them to expand statewide.
- e. Increasing collaboration among the industry and other groups to ensure that employees' basic needs are being met (e.g., housing).
- f. Encouraging visitor industry professionals to visit schools and talk to students about the types of jobs and advancement opportunities offered by the visitor industry (see also *Communications and Outreach*).

2. **Ensure a well-trained and educated visitor industry workforce by:**

- a. Providing accurate information about the visitor industry career

- opportunities available (see also *Communications and Outreach*).
- b. Developing new and supporting existing educational programs for the workforce (but especially the cruise industry) that are focused on topics such as Hawaiian culture and hospitality, Hawai'i's natural environment, foreign cultures and languages, safety and rescue training and hotel managerial training (see also *Hawaiian Culture* and *Natural Resources*).
 - c. Expanding existing and developing new visitor industry workforce training programs at all levels focusing areas that support advancement opportunities such as multi-cultural knowledge, foreign language training, Hawaiian cultural education, and management skills.
 - d. Supporting ongoing education and training opportunities for the visitor industry workforce (e.g., entrepreneurial training programs, interpretive training programs, and employee training hotel site).
 - e. Encouraging the development of certification, award or recognition programs to ensure a certain level of service is provided to visitors.

- 3. ***Ensure that the community has sufficient employment and advancement opportunities within the visitor industry*** by:
 - a. Developing communication and outreach programs to increase awareness for the diverse range of career opportunities available within the industry (see also *Communications and Outreach*).
 - b. Conducting resident sentiment and workforce sentiment surveys to understand the value, concerns and needs of visitor industry employees (see also *Communications and Outreach*).
 - c. Supporting internship programs that offer educational and employment opportunities to residents.
 - d. Developing programs and activities that motivate the workforce.



Employees of the Kā'anapali Beach Hotel and Kenneth Brown

STRATEGIC FRAMEWORK: WORKFORCE DEVELOPMENT

GOAL

To ensure a sufficient and highly-qualified workforce that is provided with meaningful careers and advancement opportunities.

OBJECTIVES

- Provide an adequate source of quality workforce to support the needs of Hawai'i's visitor industry.
- Ensure a well-trained and educated visitor industry workforce.
- Ensure that the community has sufficient employment and advancement opportunities within the visitor industry.

<p>Lead:</p>	<p>Government: Department of Labor and Industrial Relations; University of Hawai'i – School of Travel Industry Management; University of Hawai'i Community Colleges; Department of Education; Academy of Travel and Tourism</p> <p>Private Sector: Visitor industry businesses; Hawai'i Hotel and Lodging Association; Activities and Attractions Association of Hawaii</p> <p>Community: Unions</p>
<p>Supporting Groups/Agencies:</p>	<p>Office of the Governor; Hawaii Tourism Authority; other government agencies; educational institutions; visitor industry businesses; business organizations; residents; visitors</p>
<p>Measures of Success:</p>	<p>Specific to issues related to workforce development, the following measurements provide an indication of success:</p> <ul style="list-style-type: none"> • Increase in the number of educational programs on Hawai'i's natural environment and Native Hawaiian culture and hospitality, international culture and language, management, and safety and rescue training available • Regular coordination between the visitor industry and training/education providers • Survey of resident sentiments regarding job opportunities within the visitor industry workforce remain positive and/or improve • Visitor satisfaction surveys regarding service levels of visitor industry workforce remains positive and/or improves • Answers to questions in workforce sentiment surveys are positive • Higher enrollment in AOTT, UHCC and UH TIM programs • Increased resources for the AOTT, UHCC and UH TIM programs • More Travel Industry Management courses provided statewide

The background of the page is a close-up photograph of a fern frond, showing the intricate, feathery structure of the leaves. The image is in a muted, light green color palette. The frond is oriented vertically, with the central rachis running down the middle. The leaflets are small and densely packed, creating a complex, textured pattern.

APPENDIX

A

LISTING OF
MAJOR STAKEHOLDER
PARTNERS

APPENDIX A

Listing of Major Stakeholder Partners

In Hawai'i, tourism is everyone's business. As the lead economic activity in the State, tourism impacts private businesses, community organizations, government, unions, visitors and residents. The following lists attempt to identify the major stakeholders in Hawai'i's visitor industry, not the least of which are all of Hawai'i's individual residents and visitors to our islands.

Hawai'i State Government Agencies:

AG	Department of the Attorney General, administers and renders state legal services. Includes the Crime Prevention and Justice Assistance division.
ATDC	Aloha Tower Development Corporation, responsible for redeveloping a certain area of the Honolulu waterfront, including the landmark Aloha Tower complex, to enhance trade activity, beautify the waterfront, stimulate downtown Honolulu commercial activities, and expand public access and usage.
B&F	Department of Budget and Finance, administers the development of the State's short-, intermediate- and long-range financial plans, administers the state budget, and provides programs for the improvement of management and financial management of state agencies.
CD	Civil Defense Division, of the DOD, plans, coordinates, and supervises civil defense activities throughout the State to minimize the loss of life and property, restore essential public services, and expedite recovery and rehabilitation in the event of natural disaster or national emergency.
DAGS	Department of Accounting and General Services, responsible for the State's centralized accounting and auditing system. Directs the planning, design, engineering, and construction of public works projects. Includes Land Survey Division, Public Works Division, King Kamehameha Celebration Commission, and Stadium Authority.
DBED&T	Department of Business, Economic Development and Tourism, works to diversify the economy, expand existing business, and attract new economic activity.
DCCA	Department of Commerce and Consumer Affairs, develops standards for the licensing and supervision of financial institutions, professions, businesses, and trades. Includes Office of Consumer Protection and Regulated Industries Complaints Office.
DHHL	Department of Hawaiian Home Lands, provides benefits to Native Hawaiians through homestead leases for residential, agricultural, or pastoral purposes to provide economic self-sufficiency through the provision of land.
DLIR	Department of Labor and Industrial Relations, administers programs that improve job opportunities, protect workers' employment rights, and assure a safe and healthy work environment.
DLNR	Department of Land and Natural Resources, manages the State's public lands and the water and mineral resources on those lands and the State's aquatic life and wildlife resources, forest reserves, state parks, and small boat harbors; administers the state conservation districts and the endangered species, natural area reserves, boating and ocean recreation, and historic preservation programs. Includes Aquatic Resources Division (DAR), Division of Boating and Ocean Recreation (BORD), Division of Conservation and Resource Enforcement (DOCARE), Division of Forestry and Wildlife (DOFAW), State Historic Preservation Division (SHPD), Natural Area Reserves System Commission (NARS), and Divisions for Land, Parks, and Trails and Access.
DOA	Department of Agriculture, promotes the conservation, development, and utilization of agricultural resources in the State. Provides agricultural inspections for all incoming (to the State) flights.
DOD	Department of Defense, commanding general of the militia of the State.
DOE	Department of Education, manages the statewide systems of public schools and public libraries, and includes such programs as the high school-level Academy of Travel and Tourism (AOTT).
DOH	Department of Health, responsible for the planning, execution, and coordination of public health and environmental health programs for the protection and improvement of the environmental, physical, and mental well-being of the people of Hawai'i.
DOT	Department of Transportation, responsible for the establishment, maintenance, and operation of transportation facilities for the State to provide a system of integrated transportation facilities, which include highways, airports, and harbors. Includes Airports, Harbors and Highways Divisions, and Visitor Information Program Office.

DoTAX	Department of Taxation, administers and enforces tax laws of the State, including the state excise tax and the Tourism Accommodations Tax.
Governor	Chief Executive of the State, responsible for the execution of the laws of the State and for the effective performance of the executive branch of state government.
HCDA	Hawaii Community Development Authority, works with private enterprise and various federal, state, and county agencies to improve specific areas of the State designated by the Legislature.
HSDC	Hawaii Strategic Development Corporation, develops investment programs that stimulate economic growth, employment, and economic diversification.
HTA	Hawaii Tourism Authority, strengthens Hawaii's vital visitor industry by formulating policy, conducting research, coordinating development and implementation of the Tourism Strategic Plan, supporting product development and coordinating the worldwide marketing of Hawaii as a visitor destination.
HTDC	High Technology Development Corporation, responsible for commercial high-technology growth and development in Hawaii.
Judiciary	Judiciary, separate and distinct from, but coequal with, the Executive and Legislative branches of the State Government of Hawaii. Includes the Supreme Court, the Intermediate Court of Appeals, Circuit Courts, District Courts, Land Court, Tax Appeal Court, and Family Courts.
Legislature	Convenes once a year in Regular Session (between January and May) to consider subjects for legislation, including an annual State operating and capital improvements budget. Includes standing committees on tourism, the environment, and economic development.
LUC	Land Use Commission, implements the designation of areas into one of four major land use districts: urban, rural, agricultural, and conservation. Serves as a quasi-judicial body in administering the State land use law.
OEQC	Office of Environmental Quality Control, reviews environmental assessments and impact statements and informs the public of the availability of documents.
OHA	Office of Hawaiian Affairs, advocates for Hawaiians in the state Legislature, state and federal courts, in the United States Congress, and in the local media, as well as by supporting community initiatives and interests related to Native Hawaiians.
OMPO	Oahu Metropolitan Planning Organization, responsible for coordinating the comprehensive, continuing, and cooperative transportation planning process for the island of O'ahu.
OP	Office of Planning, maintains overall framework to guide the development of the State through comprehensive, long-range, and strategic planning to meet the needs of Hawaii's people and provide for the wise use of Hawaii's resources.
PUC	Public Utilities Commission, has general supervision over all public utilities. Examines the condition of each public utility, its operation, and the safety, hours, and wages of its employees.
READ	Research and Economic Analysis Division, the State's official source of economic data and analyses as an aid to decision-making and planning. Forecasts and measures the impacts of economic activity in Hawaii to help the State plan and adjust to changing conditions.
SFCA	State Foundation on Culture and the Arts, promotes, perpetuates, preserves, and encourages culture and the arts, history, and the humanities.
UH	University of Hawaii, provides all qualified people in Hawaii with an equal opportunity for quality college and university education and training. Includes campuses in Manoa and Hilo.
UH-CC	University of Hawaii Community Colleges, includes seven campuses that provide maximum educational opportunities to the residents of Hawaii.
UH-TIM	School of Travel Industry Management, provides training for students interested in working in the travel industry.

City and County of Honolulu

The City and County of Honolulu consists of the island of O’ahu, all other islands not included in any other county, and adjacent waters thereto.

CC	Corporation Counsel, serves as the chief legal advisor and representative of all agencies, the City Council, and all officers and employees in matters relating to their official powers and duties, and represents the City in all legal proceedings
City Council	Lawmaking body of the City and County of Honolulu; determines policies and programs for the City, including the review, amendment, and passage of an annual operating and capital improvements budget.
DBFS	Department of Budget and Fiscal Services, responsible for long-range financial planning and management of the City’s operating and capital improvement budgets.
DCS	Department of Community Services, develops and administers projects, programs, and action plans for human resources and human services programs.
DDC	Department of Design and Construction, responsible for the planning, design, and construction management of the City’s Capital Improvement Program (CIP), including the development of infrastructure and facilities for wastewater, roads, and drainage; parks, fire, police, emergency services, customer services, finance, and planning and permitting.
DES	Department of Enterprise Services, operates and maintains the Neal S. Blaisdell Center, Waikiki Shell, Honolulu Zoo, and six municipal golf courses.
DFM	Department of Facility Maintenance administers repair and maintenance programs for various City facilities.
DPA	Department of the Prosecuting Attorney, headed by the Prosecuting Attorney who attends all courts in the City and conducts, on behalf of the people, all prosecutions therein for offenses against the laws of the State and the ordinances and rules of the City.
DPP	Department of Planning and Permitting, responsible for the City’s long-range planning and community planning efforts and for the administration and enforcement of ordinances and regulations governing the development and use of land, codes pertaining to the construction of buildings, and city standards and regulations pertaining to infrastructure requirements.
DPR	Department of Parks and Recreation, manages, maintains, and operates all parks and recreation facilities of the City (except those managed by the Department of Enterprise Services); develops and implements programs for cultural and recreational activities; and beautifies public streets.
DTS	Department of Transportation Services, responsible for planning, designing, operating, and maintaining transportation systems to meet public needs.
ENV	Department of Environmental Services, protects public health and the environment by providing effective and efficient management of the wastewater, storm water, and solid waste disposal systems.
HESD	Honolulu Emergency Services Department, responsible for providing efficient, effective and economical operation of the pre-hospital emergency medical care and emergency ambulance service on O’ahu, and for providing ocean safety and lifeguard services.
HFD	Honolulu Fire Department, provides fire fighting and rescue work to save lives and properties from fires and emergencies.
HPD	Honolulu Police Department, responsible for the preservation of the public peace; protection of the rights of persons and property; prevention of crime; detection and arrest of offenders against the law; and enforcement and prevention of violations of state laws and city ordinances.
Mayor	Chief executive officer of the City and County government; performs numerous duties such as exercising direct supervision over agencies and enforcing provisions of the Charter, ordinances, and all applicable laws, and coordinating the drafting of the operating and capital improvements budget.
MOCA	Mayor’s Office of Culture and the Arts, assists the City in the preservation of the artistic and cultural heritages of all people residing in Honolulu.
NB	Neighborhood Board, provides a mechanism to increase and assure resident participation in the process of government decision-making.
OCDA	Oahu Civil Defense Agency, develops, prepares for, and under disaster or emergency situations, assists in the implementation of civil defense plans and programs to protect and promote the public health, safety, and welfare of the people of the City.
OED	Office of Economic Development, operates through four business units: the Business Advocacy Program, the Office of Waikiki Development, the Honolulu Film Office and the OED’s Community-based Economic Development Operations. Each unit contributes to the overall goals of attracting, retaining, nurturing, and advocating for businesses and business interests in Honolulu.

County of Hawai'i

The County of Hawai'i consists of the island of Hawai'i and all other islands within three nautical miles of its shores, and the adjacent waters thereto.

CDA	Civil Defense Agency, directs and coordinates the development and administration of the County's total disaster preparedness and response program to ensure prompt and effective action when natural or man-caused disaster threatens or occurs anywhere in the County.
County Council	Hawaii County Council, formulates public policy, sets goals, and provides legislative directions for implementation, including the review, amendment, and passage of an annual operating and capital improvements budget.
DEM	Department of Environmental Management, manages the solid waste, wastewater, and recycling programs of the County.
DPA	Prosecuting Attorney, attends all courts in the County and prosecutes offenses against State law and County ordinances and regulations on behalf of the people.
DPR	Department of Parks and Recreation, administers, supervises, and maintains all public parks, recreational facilities, playgrounds, and appurtenant equipment and supplies owned, possessed, or controlled by the County.
DPW	Department of Public Works, responsible for all matters relating to engineering; public and private building construction and inspection; construction, inspection and maintenance of public streets, highways, bridges and drainage facilities; acquisition of public and private properties for public purposes; design, operation and maintenance of traffic signals and traffic control devices; and all other public works projects, except for matters relating to parks and recreation, environmental management, and water supply.
HFD	Fire Department, provides an effective program for countywide fire prevention, fire control, rescue and Hazmat operations.
HPD	Police Department, preserves the public peace, prevents and detects crimes, arrests offenders, protects the rights of persons and property, enforces and prevents violations of the law, and services in civil and criminal proceedings.
Mayor	Chief executive officer of the County, exercises the executive powers of the County and responsible for enforcing the provisions of and executing the duties conferred by the Charter, ordinances, and other applicable laws, and coordinating the drafting of the operating and capital improvements budget.
MTA	Mass Transit Agency, provides affordable and cost-effective transportation services for the County, including bus service, shared-ride taxi service, and ride-matching services.
PD	Planning Department, prepares a proposed general plan to guide the development of the County and administers zoning and subdivision ordinances and regulations.
R&D	Department of Research and Development, provides the data necessary for managerial and legislative programs and guidance on public or private development programs that enhance improvement of the County community.

County of Kaua'i

The County of Kaua'i consists of the islands of Kaua'i and Ni'ihau, all other islands lying within three nautical miles of the shores thereof, and the waters adjacent thereto.

County Council	Kauai County Council, lawmaking body that determines policies and programs for the County including the review, amendment, and passage of an annual operating and capital improvements budget.
CDA	Civil Defense Agency, responsible for planning and administering the County Civil Defense organization for national, natural, manmade, and local disasters.
CPU	Kauai Community Prosecution Unit, seeks to reduce crime through collaboration with law enforcement, the Department of Education, business organizations, civic groups, and other volunteer groups.
DF	Department of Finance, prepares the annual operating and capital improvements budget bill; supervises and is responsible for the disbursement of County moneys.
DPW	Department of Public Works, performs all engineering, designing, planning, construction, maintenance, and repair of county facilities and improvements, including its parks.
KFD	Fire Department, provides an effective program for countywide fire prevention, fire control, rescue and Hazmat operations.
KPD	Police Department, preserves the public peace, prevents and detects crimes, arrests offenders, protects the rights of persons and property, enforces and prevents violations of the law, and services in civil and criminal proceedings.
Mayor	Chief executive officer of the County, exercises supervision over executive agencies and performs other duties prescribed by the Charter or by law, and coordinating the drafting of the operating and capital improvements budget.
OED	Office of Economic Development, works with the community to create economic opportunities for the development of a healthy, stable and balanced economy for the residents of the County.
OPA	Office of the Prosecuting Attorney, mandated to initiate and maintain any action or prosecution deemed necessary to enforce the laws of the State, the ordinances and rules of the County, preserve public order, and protect the public's rights.
PD	Planning Department, has review functions concerning the proposed general plan, development plans, zoning and subdivision ordinances, and any modifications or amendments.

County of Maui

The County of Maui consists of the islands of Maui, Moloka'i, Lāna'i, and Kaho'olawe, and all other islands lying within three nautical miles off the shores thereof and waters adjacent thereto, except that portion of the island of Moloka'i known as Kalaupapa, Kalawao, and Waikolu, and commonly known and designated as the Kalaupapa Settlement.

CDA	Civil Defense Agency performs emergency functions and provides public safety services.
County Council	County Council legislates taxes, rates, fees, assessments and special assessments; conducts investigations of the operation of any department or function of the County and any subject upon which the Council may legislate; and conducts many other duties, including the review, amendment, and passage of an annual operating and capital improvements budget.
DFC	Department of Fire Control, provides fire protection to the people and property of the County; investigates the cause, origin, and circumstances of fires; adopts rules relating to the protection of persons and property against fires; approves building plans as provided by law; coordinates and provides rescue protection personnel in the County; and provides for the mitigation and stabilization of hazardous materials and related incidents.
DOP	Department of Planning, oversees revisions of the general plan at least every ten years to guide the development of the County; prepares proposed zoning ordinances, zoning maps and rules, and any amendments or modifications; and reviews the lists of and prioritizing proposed capital improvements. This Department also provides support to the Maui Planning Commission, Molokai Planning Commission, and Lanai Planning Commission.
DPA	Department of the Prosecuting Attorney, headed by the Prosecuting Attorney who attends all courts in the County and conducts, on behalf of the people, all prosecutions for offenses against State laws, County ordinances, and rules.
DPR	Department of Parks and Recreation, plans, designs, constructs, maintains, and operates all parks and recreational facilities of the County, and develops and implements programs for cultural, recreational, and other leisure activities for the people of the County.
DPWWM	Department of Public Works and Waste Management, administers the building and housing codes and subdivision and zoning ordinances and rules; approves proposed subdivision plans; supervises and maintains the County's highways, drainage and flood control systems and sewer systems, and maintains the County's buildings.
Mayor	Chief executive officer of the County, exercises the executive powers of the County and responsible for enforcing the provisions of and executing the duties conferred by the Charter, ordinances, and other applicable laws, and coordinating the drafting of the operating and capital improvements budget.
MPD	Department of Police, preserves the public peace, prevents crimes, detects and arrests law offenders, protects the rights of persons and property, and provides traffic safety and education.
OED	Office of Economic Development, promotes and nurtures sustainable economic development within Maui County, consistent with the community's needs and priorities. OED works with the community, business, and government sectors to strengthen and diversify the economy by supporting existing businesses and assisting in the attraction, development, and expansion of new businesses.

The Hawai'i Congressional Delegation

At the Federal level, all legislative powers are vested in the Congress of the United States, which consists of the Senate and House of Representatives.

United States Government

The following departments and agencies of the federal government have offices in Hawai'i.

DOA	<p>Department of Agriculture</p> <ul style="list-style-type: none"> • Animal and Plant Health Inspection Service, administers federal laws and regulations pertaining to animal and plant health and quarantine, the humane treatment of animals, and the control and eradication of pests and diseases. The Department provides agricultural inspections for outgoing (to U.S. Mainland destinations) flights. • Natural Resources Conservation Service (NRCS), focuses on conservation and management of natural resources primarily on private lands.
DOC	<p>Department of Commerce</p> <ul style="list-style-type: none"> • Economic Development Administration, creates and retains jobs; stimulates industrial, technological, and commercial growth in economically distressed areas; and assists communities in creating projects that economically grow the community in areas both urban and rural. • National Oceanic and Atmospheric Administration (NOAA), describes and predicts changes in the earth's environment and conserves and manages the nation's coastal and marine resources and includes the National Marine Fisheries Service (NMFS) and the National Weather Service (NWS).
DOI	<p>Department of the Interior</p> <ul style="list-style-type: none"> • Fish and Wildlife Service (FWS), principal federal bureau for the conservation, protection, and enhancement of wildlife and plants and their habitats. • Pacific Islands System Support Office of the National Park Service (NPS) administers operations and development of two national parks (Hawai'i Volcanoes and Haleakalā), three national historic parks (Pu'uuhonua O Hōnaunau, Kaloko-Honokōhau, and Kalaupapa), one national historic site (Pu'ukoholā Heiau), and the Arizona Memorial. • Immigration and Naturalization Service (INS) enforces federal laws relating to the admission, exclusion, deportation, and naturalization of aliens in the State of Hawai'i and on Guam.
DOT	<p>Department of Transportation</p> <ul style="list-style-type: none"> • United States Coast Guard (USCG), 14th District, commands all assigned operational units and activities ashore and afloat in the Central Western Pacific, and acts as the Central Pacific Search and Rescue Coordinator, coordinating all civilian search and rescue operations in Hawai'i, and provides homeland security for the ocean surrounding the Hawaiian islands. • The Federal Aviation Administration (FAA), responsible for the promotion, regulation, and safety of civil aviation, and for the safe and efficient use of airspace by the military and civilians within a geographical area of approximately 24.7 million square miles. • The Federal Highway Administration (FHWA) administers various programs concerned with highway transportation and facilities, including the National Scenic Byways Program.
FEMA	<p>Federal Emergency Management Agency, funds emergency programs and provides technical guidance and training to ensure a broad-based emergency program to protect public safety and property.</p>
Labor	<p>Department of Labor</p> <ul style="list-style-type: none"> • The Bureau of Apprenticeship and Training, concerned with the welfare of apprentices and the formulation of apprenticeship programs through the provision of assistance, technical information, and training to sponsors.
State Dept.	<p>Department of State</p> <ul style="list-style-type: none"> • Honolulu Passport Agency, responsible for the issuance of U.S. passports and for providing information on other related services to U.S. citizens and nationals for the purposes of traveling abroad.
Treasury	<p>Department of the Treasury</p> <ul style="list-style-type: none"> • Customs Service, responsible for the enforcement of customs and related laws and the collection of revenues from imports.

Direct Tourism Stakeholders

A3H	Activities and Attractions Association of Hawaii, its mission is to 1) promote Hawaii's activities and attractions; 2) represent the views and interests of Hawaii's activities and attractions to all levels of government and industry; 3) foster professional and ethical conduct of the activity and attraction business statewide; 4) serve as an information source for the Hawaii activities and attractions; 5) advocate consumer protection as it relates to activities and attractions; 6) conduct educational programs for its members on subjects related to the travel industry and the host culture; and 7) encourage environmentally sound and culturally sensitive tourism statewide.
AOTT	Academy of Travel and Tourism, a nationally recognized career exploration, awareness and mentoring program for high school juniors and seniors. AOTT students have opportunities for paid internships with local businesses, community service projects, familiarization trips, industry tours, AOTT scholarships and other experiences.
BIVB	Big Island Visitors Bureau, promotes the interests of Hilo and West Hawaii and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions, on the Big Island.
CATRALA	Hawaii Car and Truck Renting and Leasing Association.
COC	Chamber of Commerce of works on behalf of members and the entire business community to improve the state's economic climate and help businesses thrive.
Hawaii Tourism Japan (Dentsu)	Dentsu, Inc., largest advertising agency in the world. The Hawaii Tourism Authority selected Dentsu for marketing management services (with the exception of sales) in the Japan Major Market Area.
Hawaii Tourism Oceania (Walshe Group)	The Walshe Group Ltd., provides tourism representation and marketing in the Australian and New Zealand market. The Hawaii Tourism Authority selected Walshe Group for marketing management services in the Oceania/Other Major Market Area.
HCC	Hawaii Convention Center, provides event and business services.
HEA	Hawaii Economic Association, non-profit organization of professionals from a broad spectrum of Hawaii businesses and organizations. HEA promotes public awareness and understanding of economics and supports the professional growth of its members through a forum to discuss Hawaii's economic issues and to interact with other professionals.
HEA	Hawaii Ecotourism Association, promotes communication and education about ecotourism issues; provides an information and resource network for visitors, residents, tour operators, resources managers, planners, educators, government agencies, and other professionals; promotes a visitor industry that is environmentally and culturally sensitive; promotes community-based, sustainable economic development that benefits local residents; enhances visitor experiences through effective interpretation; and promotes resource conservation.
HHLA	Hawaii Hotel and Lodging Association, statewide trade association of hotels, hotel management firms, hotel owners, suppliers, and other related firms and individuals. Mission of the HHLA is to 1) advocate the needs of its members with Federal, State and County governments; 2) provide educational opportunities, timely information and appropriate resources to members, legislators, media and the community; 3) provide a wide range of economic benefits and preferred services to its members; and 4) support and contribute to a better quality of life and environment for the community and visitors.
HIEDB	Hawaii Island Economic Development Board, non-profit networking business organization that specializes in facilitating federal resource programs and implementing economic development projects. HIEDB provides valuable information and contacts for area businesses and industries as well as key liaison to Federal, State, County and private sector resources in financing, business planning, permitting, legal advice, and other business services.
HRA	Hawaii Restaurant Association, works to maintain the highest standards in food, service, health, employment, citizenship, fair compensation, competitive purchasing, industry, and reasonable profit.
HTA	Hawaii Transportation Association, non-profit trade organization dedicated to the service and assistance to the ground transportation industry in Hawaii. Serves as a source of information by conducting research and education programs, and represents the industry's interest before County, State, and Federal agencies, County Councils, and the State Legislature and Congress.
HVCB	Hawaii Visitors and Convention Bureau, non-profit marketing organization with visitor industry and general business representation. The Hawaii Tourism Authority selected HVCB for marketing management services in the North America Major Market Area and Corporate Meetings and Incentives.

KEDB	Kauai Economic Development Board, non-profit organization that explores ways to diversify Kaua'i's economy and create and strengthen industries that can flourish on Kaua'i. Currently focuses on science and technology, diversified agriculture and aquaculture, health and wellness, and visitor industry support.
KVB	Kaua'i Visitors Bureau, promotes the interests of Kaua'i and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions, on Kaua'i.
Mangum Group	The Mangum Group, provides marketing, public relations, advertising, online/web, and language services. The Hawaii Tourism Authority selected Mangum Group for marketing management services (with the exception of sales) in the Europe Major Market Area.
Marketing Garden	Marketing Garden Ltd., leading public relations and marketing consultancy in Japan, specializing in the travel trade marketing. The Hawaii Tourism Authority selected Marketing Garden for marketing management services in the Other Asia Major Market Area.
MEDB	Maui Economic Development Board, Inc., non-profit corporation that assists the County of Maui in pursuing a high tech future. Works with the MVB to attract and/or develop science and technology conferences and symposiums on Maui.
MVB	Maui Visitors Bureau, promotes the interests of Maui and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions, on Maui.
NaHHA	Native Hawaiian Hospitality Association, non-profit organization of individuals, corporate organizations and institutions with an interest in the visitor industry and hospitality issues. NaHHA works to encourage the preservation and perpetuation of Hawaiian values, customs, language and artifacts; to incorporate the principles of <i>ho'okipa</i> and <i>aloha</i> into the operating culture of visitor industry enterprises; and to assist native Hawaiians in achieving success in tourism and hospitality endeavors that are culturally sensitive, environmentally sustainable, and economically beneficial.
OEDB	Oahu Economic Development Board, non-profit organization that works to leverage the strengths of the public and private sectors to establish O'ahu as a world-recognized location to grow business, attract smart capital investment, and create quality jobs.
OVB	Oahu Visitors Bureau, promotes the interests of O'ahu and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions, on O'ahu.
RMH	Retail Merchants of Hawai'i, non-profit trade association committed to the growth and industry in Hawai'i. Its mission is to promote the welfare of the retail industry, to provide information and training to advance the interests of the retail industry, and to serve as an advocate for the retail industry in both the governmental and the business communities.
Sierra Club	Sierra Club – Hawai'i Chapter, works to restore air and water quality, to protect and restore the land and preserve biological diversity, and to conserve Hawai'i's resources through education, litigation, lobbying, electoral politics, etc.
SMG	SMG, a private company specializes in the management of convention centers (and stadiums), and markets and sells the Hawai'i Convention Center.
TNC	The Nature Conservancy of Hawai'i, works to preserve the plants, animals, and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.
VASH	Visitor Aloha Society of Hawaii, and its counterparts in each county, its mission is to share the Aloha spirit with visitors victimized by crime or adversity.



APPENDIX **B**

SUMMARY OF
ISLAND FOCUS
GROUP MEETINGS
(MARCH - APRIL 2004)

APPENDIX B

Summary of Island Focus Group Meetings (March - April 2004)

As part of its efforts to develop the *TSP*, the Hawaii Tourism Authority (HTA) conducted focus group and public meetings throughout the State during the months of March and April 2004 to gather community input regarding tourism issues in Hawai'i. Over 175 attendees participated in the island meetings which were held as follows:

MEETING DATES	LOCATION	ATTENDANCE
March 9	Lāna'i City, Lāna'i	5
March 16-17	Kaunakakai, Moloka'i	18
March 23-24	Kahului, Maui	29
March 30-31	Līhu'e, Kaua'i	33
April 5-6	Hilo, Hawai'i	32
April 7-8	Kona, Hawai'i	20
April 13-14	Honolulu, O'ahu	40

In general, participants from each island brought up concerns related to their respective regions; however, there were a number of key themes that were expressed throughout all meetings including:

- **Take care of Hawai'i's natural resources;**
 - One of the reasons visitors choose Hawai'i as a destination is its unique and beautiful natural environment that includes public (Federal, State and County) and private parks, beaches, trails, gardens, and other resources. However, over the last several years, due to increased usage and decreased funding, the quality of many of Hawai'i's natural resources have declined.
- **Honor and perpetuate the Native Hawaiian culture and respect and collaborate with the Hawaiian community;**
 - The Native Hawaiian culture is what makes Hawai'i a unique place to live and a unique place to visit. It is the one single attribute that distinguishes the Hawai'i experience from all other visitor experiences around the world. It is essential to: accurately and respectfully represent the Native Hawaiian culture in tourism activities and marketing efforts; provide support for Native Hawaiian practitioners, musicians and artists to perpetuate the culture; and increase collaboration and bridge the gap that exists between the Hawaiian community and the visitor industry.
- **Coordinate tourism efforts on a statewide level while recognizing the uniqueness of each island;**
 - In addition to recognizing each island's unique strengths, weaknesses, opportunities and challenges, it is important to note statewide trends such as decreases in multi-island day trips and the availability of direct flights to some islands. Each individual island is becoming a "brand" (a recognized destination)

in itself and overall tourism efforts on a statewide level must strive to recognize and maximize each island's uniqueness, strengths and desires.

- **Improve and expand the experience for first-time and repeat visitors;**
 - Both physical “products” and experiential activities contribute to the visitors’ experience and participants’ quality of life. It is imperative that the maintenance, renovation and addition of public infrastructure (including airports, harbors, roadways and utilities), private resources (including accommodations, services and attractions), and community activities (including developing targeted niches, festivals and other events) be reviewed and improved (as needed) on an ongoing basis.
- **Provide a safe environment;**
 - The increase in the number of criminal activities and accidents (or even the perception of such increases) impacts residents and visitors alike. Collaborative efforts from the public (Federal, State and County) and private sectors in prevention, deterrence, and enforcement measures must be a focus to ensure that Hawai‘i continues to provide a safe environment for both visitors and residents.
- **Focus on the human element which makes up Hawai‘i’s people.**
 - There were two concepts related to the people of Hawai‘i and the visitor industry that were raised throughout island meetings. The first was the need for ongoing training and education at all levels for those involved in the industry to ensure that Hawai‘i’s workforce provides a first-rate experience for visitors and keeps pace with the dynamic and changing industry. The second concept was the need to build a stronger connection and more collaboration between the visitor industry and the community to maximize benefits for all.
- **Increase awareness of tourism’s contributions, benefits, concerns and plans among stakeholders.**
 - Everyone in Hawai‘i is a stakeholder in tourism (residents, private businesses, government agencies and visitors), as tourism is the main economic engine of Hawai‘i. To achieve a sustainable tourism industry, stakeholders need accurate information about tourism and opportunities to provide feedback on tourism issues.
- **Improve inter-island air service.**
 - Reduced inter-island flights and increased airfares were major issues raised throughout island meetings. As the two major inter-island air carriers expand mainland and trans-pacific flights, convenient and affordable inter-island air service is needed Hawai‘i residents and visitors.

In addition, each community raised concerns specific to their needs and desires. These overall issues and more specific strategic directions are outlined on the following pages by county.

CITY AND COUNTY OF HONOLULU

Access: The discussion for this topic included the areas of Airports and Airlift, Harbors and Vessels, and Roads and Ground Transportation. Honolulu participants discussed the need for better coordination between the various divisions (Airports, Harbors and Highways) within the Department of Transportation (DOT) and suggested the following:

Airports and Airlift

- Improve inter-island air service by increasing flights to and from neighbor islands and maintaining and not increasing current airfares;
- Enhance the visitor arrival and departure experience by quickening processing time through security checkpoints at Honolulu International Airport (HIA), improving signage at airports to provide better instructions, improving infrastructure at the HIA such as the people mover (WikiWiki Shuttle) and the international arrival terminal, and providing hospitality training for all HIA employees;
- Identify carrying capacity scenarios at airports statewide to accommodate future visitors;
- Enhance service to international visitors traveling to neighbor islands by reducing or negating excess baggage charges, informing visitors about potential charges prior to their arrival at airports, and providing storage or mailing services for visitors;
- Increase direct flights from MMAs; and
- Improve coordination between airlines, the DOT Airports Division and the marketing of airports.

Harbors and Vessels

- Anticipate and address the impacts of the cruise industry and the SuperFerry on marine resources, traffic, the spread of alien species, and possible recreation vehicle (RV) use; and
- Improve harbors, especially at Aloha Tower, to better accommodate the cruise industry.

Roads and Ground Transportation

- Maintain roads and signage;
- Improve the general appearance of highways and roadways between the airport and Waikīkī;
- Improve access within Honolulu by making Waikīkī more “walkable” and connecting it with Downtown Honolulu; and
- Develop water taxis along the Ala Wai Canal.

Communications and Outreach: Lack of awareness for the value and contributions of tourism and negative perception of tourism in Hawai‘i were major issues discussed. Meeting attendees suggested various strategic directions to enhance relations between residents and the visitor industry:

- Increase awareness of the value and contributions of tourism and improve the understanding of tourism;
- Re-institute “Mahalo” awards for visitor industry employees;
- Improve the visitor industry’s public relations program;
- Increase resident access to the Hawai‘i Convention Center and Waikīkī;
- Establish a tourism section in newspapers, increasing community participation in tourism planning efforts;
- Enhance the hotel “embrace-a-school” program;
- Improve the visitor industry’s presence and representation in the political arena and community (such as through various community associations and board memberships); and
- Instill pride in the visitor industry workforce to “tell the tourism story” to other residents.

Hawaiian Culture: Major concerns raised were the visitor industry's understanding and use of Native Hawaiian culture and values. Strategic directions suggested to honor and perpetuate Hawaiian culture include:

- Develop an interpretive plan to identify Hawaiian cultural sites that can be visited and those that should be restricted;
- Develop interpretive programs to protect cultural resources and enhance the visitor experience at sites appropriate for public visitation;
- Provide coordinated interpretive information at specific sites in O'ahu such as Ko'olaupoko and Ko'olauloa;
- Support working artists and cultural practitioners;
- Perpetuate Native Hawaiian cultural values;
- Educate children of all ages about Hawaiian culture and hospitality;
- Integrate Hawaiian culture with the hospitality industry by inviting *kupuna* to hotels to educate visitor industry employees about Hawaiian culture and hospitality; and
- Educate Hawai'i's visitor industry to be sensitive to and knowledgeable about Hawaiian sovereignty.

Marketing: Major issues raised were marketing to leisure and business travelers and spending marketing dollars on desirable Major Market Areas (MMAs). Suggested strategic directions include:

- Determine the proper mix of leisure versus business travelers;
- Allocate resources to target each type of traveler;
- Focus and spend marketing dollars on desirable Major Market Areas (MMAs);
- Base marketing budgets on the percentage of revenue generated by each respective area;
- Enhance marketing of culture (representing Hawai'i's diverse population) and the arts; and
- Market Honolulu as a "Great City."

Natural Resources: Poorly maintained parks, beaches and trails (especially comfort stations and campgrounds) were a major concern and several suggestions were made to protect and enhance natural resources, including:

- Improve maintenance of parks, beaches and trails (especially comfort stations and campgrounds);
- Allow community-based non-profit organizations to bid on private maintenance and operation of State parks;
- Pursue Federal and private grant funds to protect natural resources;
- Improve enforcement in Natural Area Reserves;
- Ensure that accurate information is provided to visitors in travel guidebooks and websites by regularly evaluating these sources;
- Develop a certification program for small tour operators; and
- Protect coastal lands from development.

Research and Planning: Impacts of the cruise industry were a major issue, and the following was suggested:

- Conduct research to identify and address the impacts of the cruise industry, and
- Provide more opportunities for community participation in cruise industry issues and planning.

Safety and Security: Honolulu meeting attendees raised concerns about crime, visitor safety and visitor assistance in the event of emergency situations. They suggested several strategic directions to ensure a safe and secure visitor experience, including:

- Develop safety and security measures for visitor activities using smaller vessels;

- Develop a communications plan to issue timely, accurate information regarding natural disasters or security situations within the visitor industry;
- Reduce car break-ins, random assaults and robberies by directing visitors away from high incident natural areas (such as Waimea Bay), educating visitors in a non-threatening manner about potential crime and hazards in swimming, hiking and driving, and increasing police presence in Waikīkī (with officers in visitor-friendly uniforms);
- Support increased funding to the Visitor Aloha Society of Hawaii (VASH) to enhance programs that assist visitors victimized by crime or other adversity; and
- Develop a public relations program (for both the victim and the media) to address the potential for negative publicity of Hawai‘i that may arise after an incident occurs.

Tourism Product Development: Lack of support for cultural festivals and the need to develop new attractions and desired niche markets were major issues raised. Meeting participants suggested the following strategic directions to enhance the visitor experience:

- Support cultural festivals such as the Aloha Festival, the Hawaii International Film Festival, and the Honolulu Festival;
- Develop a calendar of events;
- Time events to attract visitors in shoulder seasons;
- Identify and support the development of new attractions;
- Provide visitor information facilities statewide;
- Establish a Hawaii Capital Heritage District to lead to greater heritage tourism;
- Increase support for niche markets that are sustainable;
- Attract desirable visitors (higher spending, longer staying);
- Expand agri-tourism by reviewing inconsistent land use laws, changing legislative mandates to support its marketing, providing group liability insurance, and mapping agri-tourism sites on each island;
- Provide interpretive signage at sites that can be visited throughout O‘ahu; and
- Reassess the visitor plant inventory.

Workforce Development: Meeting participants discussed the need to maintain a qualified visitor industry workforce and suggested several strategic directions including:

- Present career opportunities to residents, especially children and young adults;
- Enhance the visitor industry “embrace-a-school” program;
- Expand internship programs;
- Expand the Academy of Travel and Tourism (AOTT) program in high schools;
- Increase recruitment of AOTT graduates for the University of Hawai‘i, School of Travel Industry Management (UH TIM); and
- Provide the visitor industry workforce with training and education to include Native Hawaiian culture and hospitality, working familiarity with international cultures, and tourism’s benefits to Hawai‘i.

COUNTY OF HAWAII

HILO

Access: Limited inter-island flight schedules and high airfares, needed infrastructure improvements at Hilo Harbor, and the ability of East Hawai'i roads to accommodate future traffic demands by residents, visitors and the growing timber industry were major concerns raised. Strategic directions suggested by meeting participants include:

Airports and Airlift

- Attract more airlines to Hilo Airport for better inter-island travel service;
- Increase the visitor plant inventory to accommodate direct flights to Hilo; and
- Improve the visitor arrival experience at the Hilo Airport and the Honolulu International Airport.

Harbors and Vessels

- Improve the visitor experience at Hilo Harbor by continuing the *kupuna* greeter program;
- Improve infrastructure at Hilo Harbor (for safety, security and aesthetics) by refurbishing Pier 1 to remove asbestos, extending another pier to allow two cruise ships to dock at once, and being more visitor-friendly; and
- Encourage cruise ships to stay in Hilo Harbor longer so passengers can spend more money in Hilo.

Roads and Ground Transportation

- Ensure that East Hawai'i roads can accommodate future traffic demands by residents, visitors, and the timber industry;
- Protect Hawai'i Belt Road from landslides at Maulua, Laupūhoehoe, and Kaawalii gulches; and
- Develop minimum standards for the physical condition of taxis, physical presentation (grooming) of drivers, communication skills of drivers, and drivers' knowledge of Hawaiian culture.

Communications and Outreach: The importance of communicating safety, environmental and Hawaiian cultural issues to visitors and the visitor industry was discussed. Another concern voiced was the need for more community outreach by the visitor industry. Strategic directions suggested to enhance communication between residents, visitors and the visitor industry include:

- Educate visitors (in a non-threatening way) about environmental concerns, Hawaiian cultural concerns, and the potential for crime and hazards while swimming, hiking and driving;
- Educate the visitor industry about Hawaiian culture;
- Improve public sentiment for tourism by increasing the number of general managers originally from Hawai'i, providing children with role models who had the same upbringing and hold a management position, providing more opportunities for community outreach by the visitor industry, and teaching the concept of hospitality or *hookipa* to residents.

Hawaiian Culture: Major issues raised were the visitor industry's use and lack of knowledge about Hawaiian culture and cultural sites. Attendees suggested the following strategic directions:

- Support the Hawaiian music industry including the Hawaiian Academy of Recording Arts and Hawaiian music education in schools;
- Provide education in Hawaiian culture for hotel owners, general managers, the visitor industry workforce, and taxi drivers;
- Identify Hawaiian cultural sites that can be visited and those that are *kapu* as part of an interpretive plan;

- Enhance Hilo’s reputation as “the cultural capital of the State” by increasing support for cultural infrastructure (similar to natural resources infrastructure) and the Kamehameha Festivals;
- Perpetuate Hawaiian culture by conducting and publishing oral histories from Hawai‘i’s *kupuna* and inspiring young people to continue Native Hawaiian cultural practices.

Marketing: Marketing of community-based events and incentive travel marketing were major issues discussed. Specific strategic directions suggested by meeting participants include:

- Improve marketing of community-based events;
- Develop a web-based calendar of events and festivals to be maintained by the Big Island Visitors Bureau (BIVB);
- Increase incentive travel marketing;
- Capture pre- and post-Hawai‘i Convention Center business travel; and
- Improve marketing in order for West Hawai‘i visitors to stop in Hilo on route to and/or from Volcanoes National Park.

Natural Resources: Developing an accurate inventory of natural resources and hiking trails that can be accessed by the public, and vandalism of park restrooms were major issues raised on this subject. Several strategies were suggested to protect natural resources including:

- Develop an interpretive plan for Hawai‘i (with participation by Hawaiian cultural practitioners and the resident community) to include accurate inventory of natural resources and hiking trails that can be accessed by the public;
- Provide more and improve existing hiking trails and public camping sites;
- Prevent vandalism of park restrooms by educating school children and by promoting stewardship such as adopt-a-park programs;
- Provide public restrooms in Pohoiki and Waipi‘o Valley to protect natural resources;
- Identify carrying capacity limits in infrastructure to support visitors;
- Improve enforcement of rules at natural resource sites by increasing coordination between the Department of Land and Natural Resources Division of Conservation and Resources Enforcement (DOCARE) and the Police Department; and
- Establish certification for tour operators at natural resource sites.

Research and Planning: Hilo meeting participants voiced concern about capacity of highways and other issues, and suggested the following strategies:

- Engage in research and planning to ensure that roads in East Hawai‘i (especially Hawai‘i Belt Road between Hilo and Honokaa) can accommodate future traffic increases, to identify carrying capacity limits in infrastructure, and to identify and address cruise ship impacts on pollution and marine resources.

Safety and Security: Educating visitors about potential crime and dangers in swimming, hiking and driving was one of the major issues raised. Suggested strategies to reduce crime and improve visitor safety include:

- Ensure that accurate information is provided to visitors by monitoring guidebooks and websites;
- Educate visitors about the potential dangers in swimming, hiking and driving through well-worded safety pamphlets;
- Provide safety information at rental car companies, visitor accommodations, airports, harbors, and the BIVB website;
- Improve safety signage;

- Enhance the communications skills of lifeguards to rely more on warnings rather than rescues;
- Establish a certification process for visitor activity companies (eco-tours, scuba, etc.) and publicize certified companies;
- Increase resident involvement in reducing crime and increasing safety; and
- Develop an Emergency Communications Plan to assist and maintain communication with visitors in the event of emergencies or natural disasters.

Tourism Product Development: Major issues discussed were the struggle of smaller event organizers to develop a successful event and the need to promote science, culture and nature niches. The following strategic directions were suggested:

- Help smaller event organizers to develop a successful event by providing technical support (such as grant writing, money managing, business planning, marketing and public relations) and developing a database of exhibits produced by different entities for tradeshow;
- Promote niches including science, culture and nature;
- Support major festivals such as the Merrie Monarch Festival and the Aloha Festivals;
- Provide information about events and festivals to visitors, including those staying in bed and breakfast establishments (B&Bs) and vacation rentals;
- Develop and distribute cultural travel itineraries to all visitors;
- Increase funding for planning the continued preservation and rehabilitation of Downtown Hilo;
- Increase funding for the marketing of Downtown Hilo as a historical attraction;
- Establish official “National Heritage Areas” in areas such as Hāmākua, Volcano, Hōlualoa, and Kau;
- Designate certain highways as “National Scenic Byways;” and
- Improve the quality and appearance of signs by developing an interpretive plan for the entire island and establishing a signage workshop for various public agencies that install signage.

Workforce Development: Major issues raised included the importance of educating residents, especially young students, about visitor industry career opportunities and providing training to enable them to obtain industry jobs. Also discussed was the need to offer training and career advancement opportunities to industry workers. The following strategic directions were suggested to ensure a sufficient number of qualified employees:

- Provide more opportunities for full-time employment in the visitor industry;
- Recruit East Hawai‘i residents to work in West Hawai‘i’s visitor industry and facilitate transportation and housing;
- Educate young students about visitor industry career opportunities by establishing the AOTT program in Hilo, teaching language skills to residents to prepare them to work in the visitor industry, and providing role models who grew up in Hilo and have good jobs in the visitor industry;
- Educate visitor industry employees, including cruise ship employees, about Hawai‘i, Native Hawaiian culture, and hospitality;
- Provide opportunities to educate cruise ship passengers about Hawaiian culture through arts and crafts programs onboard.

KONA

Access: Major concerns were the high cost of inter-island air travel, the infrastructure at Kona Airport, Kailua Pier and its ability to accommodate the SuperFerry and cruise industry, and Kona's dependency on cars. Strategies suggested in the areas of Airports and Airlift, Harbors and Vessels, and Roads and Ground Transportation include:

Airports and Airlift

- Replace the temporary security tent at Kona Airport with a permanent structure;
- Expand the Kona Airport to accommodate more private jets;
- Support inter-island flight service competition; and
- Create a subsidy program for kamaaina travelers as a means of lowering airfares.

Harbors and Vessels

- Assess the ability of Kailua Pier to accommodate the growing cruise industry and the SuperFerry;
- Improve Kailua Pier by providing agriculture inspection and tenders for the safe transfer of cruise ship passengers onto the pier; and
- Review the impact of the growth of cruise ship visitors on the demand for airline flights.

Roads and Ground Transportation

- Address Kona's dependency on cars;
- Explore the feasibility of public transportation in Kona;
- Mitigate traffic between Kona and Hilo;
- Improve roads by building a Waimea Bypass Road per the Waimea 2020 Plan, widening Queen Ka'ahumanu Highway to four lanes, and improving bikeways;
- Improve the service provided by car rental companies, especially for visitors involved in car accidents;
- Anticipate and address the possible impacts of recreational vehicles, given their potential use with the advent of the Super Ferry; and
- Improve Alii Drive by designating a portion of it as a Business Improvement District and closing it from through traffic.

Communications and Outreach: Lack of public awareness for the value and contributions of tourism in Hawai'i and the need for visitor industry role models were some issues discussed. Specific strategic directions suggested to increase understanding and appreciation for tourism include:

- Communicate to students all over the Big Island that visitor industry jobs are honorable and can provide a good career;
- Perform more community outreach by the visitor industry; and
- Encourage visitor industry employees to act as spokespersons for careers in tourism for Hawai'i's children.

Hawaiian Culture: One major concern about Hawaiian culture was residents' misuse of the Hawaiian language in referring to place names. Other concerns were for the protection of historical/cultural sites and for "Hawaiian" products made outside of Hawai'i. Suggested strategic directions to perpetuate the Native Hawaiian culture include:

- Perpetuate the Native Hawaiian culture and language by teaching visitors simple Hawaiian phrases and protocol for visiting cultural sites, educating the cruise industry about Hawaiian culture, requiring cultural training as part of the licensing of activity tour operators, advancing the learning of the Hawaiian language and culture among residents, increasing the use of Hawaiian words and correct place names through a regular column in the local newspaper, and discouraging residents' misuse of the Hawaiian language in referring to place

names (such as “K Bay” for Kealahou Bay and “Queen K Highway” for Queen Ka‘ahumanu Highway)

- Protect historical/cultural sites in Hawai‘i such as Hale Halewai O Hōlualoa, Hulihe‘e Palace, the Naha and Pinao Stones in Hilo;
- Improve historical/cultural sites such as Mo‘okini Luakini Heiau by providing interpretation;
- Support “Made in Hawai‘i” products by allowing only Hawai‘i-made arts and crafts to be sold in airports and harbors; and
- Promote Hawaiian culture in planning and architecture.

Marketing: Meeting participants expressed concern over the marketing budget of the Hawai‘i Convention Center (HCC) and the marketing budget set aside for Kona. They suggested specific strategic directions including:

- Reevaluate the HCC’s policy on marketing to groups smaller than 1,000 people to not compete with business or marketing efforts of neighbor island hotels;
- Set a budget for business marketing on neighbor islands to equal the budget of the HCC;
- Improve marketing by identifying the desired mix of business versus leisure travelers; and
- Increase visitor numbers from Japan and California.

Natural Resources: The poor condition of Big Island parks and their need for significant repairs were a major issue raised in Kona. Commercial kayaking in Kealahou Bay was another concern. Several strategic directions to enhance natural resource sites include:

- Repair various parks on the Big Island in poor condition including Hapuna Beach Park, Kekaha Kai State Park, Spencer Beach Park, Kapa‘a Beach Park, Kahaluu Beach Park, Akaka Falls State Park, Kekaha Kai State Park (Kua Bay Beach portion), and Lapakahi State Historical Park;
- Implement various improvements at each park including repairing restroom and camping facilities and providing electricity and running water;
- Implement the master plan for Keolonahihi State Historical Park at Kamo Point;
- Attract private sector partners to help fund planned park improvements;
- Identify Ala Kahakai (shoreline trail) as a means of connecting various State and County parks;
- Install interpretive signage at natural resource sites to protect natural resources and enhance the visitor experience at these sites; and
- Assess the impact commercial kayaking in Kealahou Bay has on natural resources.

Research and Planning: Aging hotel room inventory in West Hawai‘i and cruise ship impacts were major concerns. The following strategies were suggested to effectively plan for Hawai‘i’s visitor industry:

- Address the issue of aging hotel room inventory;
- Increase the visitor plant inventory in West Hawai‘i;
- Identify and address the needs and impacts of the growth of the cruise industry on flights, accommodations, traffic, and natural resources;
- Conduct tourism sustainability planning by computer modeling was another suggested approach to effectively plan for Hawai‘i’s visitor industry.

Safety and Security: The commercial kayaking industry and signage along Queen Ka‘ahumanu Highway were major concerns raised by Kona meeting participants, who suggested several strategic directions to ensure a safe and secure visitor experience including:

- Educate visitors in a non-threatening way about potential crime and the potential hazards involved in swimming, hiking and driving;

- Provide lifeguards at State beach parks (except Hāpuna, where the County is already contracted by the State to provide lifeguards);
- Regulate the commercial kayaking industry by educating its workforce in environmental issues and Hawaiian culture;
- Improve signage along Queen Kaʻahumanu Highway;
- Prevent accidents and crime by increasing police presence in Kailua-Kona (through bike patrols and additional marked police cars); by counting the number of visitors and part-time residents, in addition to full-time residents, to ensure the proper number of police officers in West Hawaiʻi; and by including the cost of in-room safes and luggage storage in hotel room rates;
- Continue the air ambulance service on the Big Island to assist both residents and visitors involved in accidents in rural areas; and
- Develop an emergency communications plan to educate and notify visitors about emergencies or natural disasters.

Tourism Product Development: Lack of support for the Hawaii Arts Season, especially on neighbor islands, was a major concern voiced by meeting attendees, who expressed a desire to market Hawaiʻi’s culture and arts and develop emerging markets. The aging visitor plant inventory in Kailua-Kona was another major concern. Strategies suggested to enhance the visitor experience include:

- Increase support for the Hawaii Arts Season, especially on neighbor islands;
- Expand the Hawaii Arts Season year-round;
- Increase support for the Aloha Festivals in Kailua-Kona;
- Establish a culture and arts center in Kona;
- Develop a web-based calendar of events and festivals to market Hawaiʻi’s culture and arts;
- Expand the agri-tourism niche;
- Consider marketing to the gay clientele, as other tourist destinations are experiencing success by targeting gays;
- Identify Kona’s needs and assets and include Kahikolu Church and agri-tourism in the marketing of South Kona;
- Increase the number of sporting events on the Big Island by supporting the growth of Kona and Hilo marathons, the International Va’a Federation Hilo World Sprints, an Aloha Golf Season, and a Japanese Professional Golfers Association event; and
- Renovate older hotels in Kailua-Kona to keep the visitor plant inventory updated.

Workforce Development: Major issues raised included the need to provide training for students wanting to work in the visitor industry and illegal drug use by some industry employees. Specific strategic directions suggested by meeting participants include:

- Establish the Academy of Travel and Tourism (AOTT) program on the Big Island;
- Perform random drug testing of industry employees, as illegal drug use is a problem; and
- Support the Hawaiʻi County Police Department’s Ice Task Force.

COUNTY OF KAUA'I

Access: Discussion focused on the need to improve infrastructure at Līhu'e Airport, Nāwiliwili Harbor and along roadways. Suggested strategies include:

Airports and Airlift

- Extend the Līhu'e Airport runway to improve passenger safety;
- Provide a heliport;
- Provide a second airport entry;
- Expand the baggage claim area; and
- Improve airport gates.

Harbors and Vessels

- Ensure the ability of Kaua'i harbors to accommodate the growing cruise industry and the advent of the SuperFerry, and
- Enhance the arrival and departure experience for cruise ship passengers at Nāwiliwili Harbor by improving piers, the terminal and visitor information services.

Roads and Ground Transportation

- Improve signage on roads to address access and safety issues (consider the use of international symbols to identify accommodations);
- Develop a driver education brochure for visitors;
- Improve roads through State parks (such as Kokee and Waimea) by turning them over to the Department of Transportation (DOT) and/or by charging entrance fees; and
- Improve the service provided to visitors by rental car companies through better customer service training of employees and more flexible operating hours to accommodate customers on delayed incoming flights.

Communications and Outreach: Lack of community respect for tourism and inaccurate information provided by travel books and websites were concerns voiced by meeting attendees who suggested the following:

- Increase community respect for tourism by developing and implementing a communications plan "to tell the tourism story," updating and airing the "\$20-bill commercial;"
- Monitor travel books and websites that may provide visitors with inaccurate information; and
- Strengthen sister-city relationships to provide neighbor island students with opportunities to travel.

Hawaiian Culture: Lack of understanding for Hawaiian culture, community and hospitality values by those having direct contact with visitors was a major issue. Strategic directions suggested by meeting participants include:

- Provide Hawaiian cultural and hospitality education for the visitor industry workforce, including taxi drivers, as they have direct contact with and provide information to visitors, and
- Expose residents to Hawaiian culture, starting with elementary school students.

Marketing: The impact of new timeshares and timeshare conversions on business travel was a major concern raised by Kaua'i meeting participants who suggested the following:

- Address the impact of new timeshares and timeshare conversions on the availability of rooms and on business travel, and
- Increase the number of business travelers by increasing room inventory and capturing pre- and post-Hawai'i Convention Center (HCC) business travel.

Natural Resources: The disrepair of State and County parks in Kaua‘i was likely the most significant issue raised by meeting participants who identified numerous sites in need of improvements and ongoing maintenance. To protect natural resources, attendees suggested the following:

- Provide improvements and ongoing maintenance of park facilities, especially restrooms, by increasing volunteerism and the Department of Land and Natural Resources (DLNR) budgets, establishing user fees, and developing creative means for maintaining parks;
- Address the issue of commercial activities (such as illegal surf schools) taking place at Kaua‘i beaches;
- Develop rules and regulations for the commercial use of beaches;
- Improve enforcement of established park rules including those against illegal commercial activities, theft, drug use, vandalism, and illegal camping; and
- Protect natural resources by monitoring information provided and sites promoted in travel books and websites and providing better interpretive services at natural resource sites (which would also enhance the visitor experience).

Research and Planning: Meeting participants suggested the following to address the visitor plant inventory and the poor condition of public parks on Kaua‘i:

- Enhance research and planning efforts to improve Kaua‘i parks by conducting a County park user survey (similar to the State Parks Survey) and hiring more park planners;
- Monitor the room inventory on Kaua‘i to assess their impact on marketing, specifically the business travel market; and
- Identify, regulate and tax B&Bs and vacation rentals.

Safety and Security: Water safety at Kaua‘i beaches and the need for better cooperation with the Visitor Aloha Society of Hawaii (VASH) by the Kaua‘i County Police Department (KPD) were the major issues discussed. The following strategies were suggested:

- Address water safety issues by providing additional lifeguards at beaches and developing and airing a water safety video on KVIC (Kauai Visitor Information Channel) and if possible, on all incoming flights;
- Increase cooperation of KPD officers with VASH to assist visitors victimized by crime or other adversity;
- Provide better leadership of the KPD; and
- Develop a communications plan to keep visitors safe and informed in the event of emergency situations and natural disasters.

Tourism Product Development: The difficulties of getting a marriage license on Kaua‘i and the need to support the development of the agri-tourism niche and provide technical support to event organizers were major issues discussed. Meeting participants suggested the following:

- Facilitate the process of obtaining marriage licenses, if weddings are to continue as one of Kaua‘i’s niches;
- Support the development of the agri-tourism niche by reviewing land use laws to allow for such things as overnight accommodations;
- Provide better interpretive services at natural resource sites to enhance the visitor experience;
- Maintain the Ahukini Gateway landscaping to enhance the visitor arrival and departure experience;
- Provide technical support (such as business planning, grant writing and managing money) to small festival and event organizers; and
- Regulate the growth of the health and wellness niche so that some businesses do not leave visitors with a negative experience or adversely impact cultural sites.

Workforce Development: Meeting attendees discussed needed improvements to the University of Hawai'i, School of Travel Industry Management (UH TIM) to offer tourism education programs to residents statewide. Taxis and service by taxi drivers and rental car companies having a negative impact on visitor experiences was another major concern. Strategic directions suggested by meeting participants include:

- Improve the UH TIM by increasing recruitment of local students and increasing collaboration with UH CC to ensure that credits transfer and to offer a two-year "TIM" degree at Kaua'i Community College;
- Encourage hotels to adopt the hospitality training program developed for the Kauai Marriott by UH TIM;
- Expand the Academy of Travel and Tourism (AOTT) program (currently at Kaua'i High School) to other high schools on the island; and
- Enhance the taxi service provided to visitors by improving the physical condition of taxis, ensuring that drivers have training in customer service and Hawaiian culture, assigning the responsibility of regulating taxis to the Public Utilities Commission (PUC), and restricting taxis that do not meet standards developed for their physical condition and knowledgeable drivers at harbors and airports.

COUNTY OF MAUI

ISLAND OF LĀNA‘I

Access: One major issue was the high cost of inter-island travel and the limited flight schedule to and from Lāna‘i. Other issues were the need for harbor infrastructure improvements and improved road maintenance. Suggested strategic directions to improve access to, from and within Hawai‘i include:

Airports and Airlift

- Increase the number of flights to and from Lāna‘i;
- Improve inter-island travel (limited schedule and expensive airfare);
- Provide more agricultural inspectors at the Lanai Airport to accommodate later flights; and
- Improve commuter terminal at the Honolulu International Airport (amenities and signage).

Harbors and Vessels

- Provide a paved parking area and a paved, covered and landscaped seating area for harbor users at Manele Small Boat Harbor;
- Bring more visitors from Maui to Lāna‘i by ferry; and
- Provide a breakwater at Kaumalapau Harbor.

Roads and Ground Transportation

- Maintain all roads (paved and 4-wheel drive) after heavy rains, and
- Improve walkways in Lāna‘i City to accommodate pedestrians and bicyclists.

Communications and Outreach: Meeting participants discussed the need to provide students with training to obtain management positions in the visitor industry and suggested the following strategy:

- Expand the internship program at Lanai High School, which enables students to gain work experience in the visitor industry.

Hawaiian Culture: The visitor industry workforce providing visitors with inaccurate information about Hawaiian culture and protocol at cultural and natural sites was a major concern. Another concern was for Hawaiian cultural sites that need to be protected. Strategic directions suggested by meeting participants include:

- Restore, preserve and provide interpretation at Hawaiian cultural sites including Keahi Kawelo, Puu Pehe, Kaunolou and Kapiiaa Fishing Villages, Luahiwa Petroglyphs, and Kalahi; and
- Educate the visitor industry workforce in Hawaiian culture, as many employees may be new to Hawai‘i themselves and may provide incorrect information to visitors.

Marketing: One of the major marketing issues raised in the Lāna‘i meetings was a desire by the island to market itself, rather than Lāna‘i being marketed at the Maui County level. Strategies suggested include:

- Allow Lāna‘i to market itself, rather than be marketed at the Maui County level, and
- Attract business travelers attending conventions on O‘ahu and Maui.

Natural Resources: Meeting attendees discussed the need to protect and enhance natural resource sites and suggested the following:

- Improve various natural resource sites through restoration, preservation, and interpretation, and
- Provide more picnic tables at beaches.

Research and Planning: Discussion focused on meeting participants' desire for improved planning to:

- Develop more community facilities, and
- Establish a place for new small businesses.

Safety and Security: Water safety was a major concern voiced by meeting attendees who suggested the following:

- Improve water safety by enhancing the supervision of swimmers in Hulopo'e Bay, (as drowning accidents have occurred when visitors have had heart attacks or strokes while swimming), educating visitors about the possible dangers of the ocean, providing lifeguard services and/or providing tour operators with water safety training.

Tourism Product Development: Discussion focused on the need to support niches including weddings, golf, hula, and culture and arts and to provide more activities and festivals. Specific strategic directions suggested include:

- Support niches including weddings, golf, hula, and culture and arts;
- Provide more activities and festivals in Lāna'i;
- Develop small-scale televised events (such as golf tournaments and community-based events); and
- Provide more opportunities for heritage tourism, including the preservation of historic Lāna'i Town and the establishment of a pineapple museum.

Workforce Development: Major concerns were visitor industry employees providing visitors with inaccurate information about Hawaiian culture, and students being able to attain management positions in the visitor industry. Strategic directions suggested include:

- Educate visitor industry employees about Hawaiian culture and protocol at natural and cultural resource areas to ensure that accurate information is provided to visitors, and
- Enable Lāna'i students to achieve industry jobs by expanding the Lanai High School internship program, and to obtain scholarships at UH TIM.

ISLAND OF MAUI

Access: Meeting participants voiced concern for the long travel time for Japanese visitors, the ability of harbors to accommodate the cruise industry and traffic on major roadways. They suggested the following specific strategic directions to enhance access to, from and within Maui:

Airports and Airlift

- Improve Kahului Airport to accommodate more direct international flights;
- Improve the visitor arrival and departure experience at all airports;
- Expedite security inspection; and
- Improve agriculture inspection of incoming baggage.

Harbors and Vessels

- Improve harbors to accommodate cruise ships and passengers by providing additional restrooms, developing a management plan for all harbors and developing a plan to provide a pedestrian linkage between Kahului Harbor and Kahului;
- Prevent the displacement of local boaters and commuters by cruise ships at Lahaina Harbor;
- Provide agriculture inspection at all harbors; and
- Establish a forum to discuss cruise ship impacts.

Roads and Ground Transportation

- Limit access to areas unprepared for high visitation, including Ahihi-Kinau Natural Area Reserve, Kahukuloa and Hana (establish a toll on Hana Highway to restrict non-resident access);
- Improve access to areas able to accommodate larger numbers of visitors by providing pedestrian linkages (with interpretive displays) along the shoreline to commercial areas such as is Kihei and West Maui;
- Educate visitors about how to drive on roads to Hana and Kahukuloa;
- Study the feasibility of a Central Maui-West Maui connector through Iao Valley;
- Improve Pi'ilani Highway to better serve South Maui resort areas and residents;
- Reduce traffic on Haleakala Highway by supporting shuttle service to/from Haleakala National Park;
- Improve HonoaPi'ilani Highway in the Pali area; and
- Provide public transportation from harbors to commercial areas.

Communications and Outreach: Lack of awareness for tourism's value and the need for increased collaboration between tourism stakeholders (visitors, the visitor industry and residents) were major concerns. Suggested strategic directions to enhance stakeholder relations include:

- Provide visitors with accurate information about the potential for crime, safety hazards, Native Hawaiian culture and protocol at natural and cultural resource sites;
- Increase communication within the visitor industry, especially with commercial tour operators and airlines, to ensure a safe visitor experience and improve relations with residents;
- Provide more collaboration opportunities, such as conferences and forums, to bring together private, non-profit, government, natural resource managers, cultural practitioners, and hotel organizations;
- Encourage the visitor industry to engage in more public meetings and community outreach for tourism planning;
- Publicize annual visitor industry reports and improve distribution of visitor industry information;
- Increase public awareness of tourism's benefits and contributions by encouraging visitor industry employees to attend community meetings;
- Increase visitor industry involvement in community associations; and

- Identify points of contact between governmental agencies as part of a comprehensive communications plan.

Hawaiian Culture: Major concerns for Hawaiian culture were the visitation of Hawaiian cultural sites and the need for interpretive training centers, an apprenticeship program and festivals to perpetuate Hawaiian culture. Meeting participants suggested the following:

- Provide more Hawaiian culture interpretive training centers;
- Develop apprenticeship programs in Hawaiian culture;
- Identify Hawaiian cultural sites that are *kapu*;
- Identify and develop protocol for those sites that can be visited;
- Encourage Hawaiian cultural pride; and
- Support Hawai'i arts and cultural events (such as Aloha Week and Maui Film Festival) on an ongoing basis.

Marketing: Meeting participants expressed desire to increase business travel and concerns for better business marketing. They also discussed State and County roles in marketing. Strategic directions suggested by meeting participants include:

- Identify and market new industries (such as technology);
- Determine the target mix of business and leisure travel;
- Assess the impact of the timeshare industry on business marketing;
- Increase business travel by marketing to meeting planners, targeting incentive business travelers, capturing a large business event or convention on Maui, and supporting the construction of a new business hotel near Kahului Airport;
- Address Maui's competition and effectiveness in meeting business and leisure travelers' needs;
- Increase visitor expenditures;
- Enhance marketing of events by "publishing" and maintaining a calendar of statewide events;
- Identify Maui's assets (what makes it different from other islands);
- Support targeted niches accordingly, including weddings, honeymoons, golf, health/wellness, and technology;
- Improve marketing for culture and the arts programs; and
- Task the State to market Hawai'i and each County to market their respective island(s).

Natural Resources: Publications providing visitors with dangerous and inaccurate information (particularly *Maui Revealed*) was a major concern, as was the spread of invasive species with the advent of the SuperFerry and the impact of cruise ships on marine life. Strategic directions suggested by meeting attendees to protect and enhance natural resources include:

- Review publications (such as guidebooks and websites) providing visitors with dangerous and inaccurate information (particularly *Maui Revealed*);
- Work with publishers and request that they edit their books and websites when inaccurate information is found;
- Determine and enforce the carrying capacity for all natural resource sites frequented by visitors;
- Address the potential spread of invasive species with the advent of the SuperFerry;
- Identify potential impacts of cruise ships on marine life;
- Improve cruise ships' waste management practices; and
- Preserve open space by supporting agri-tourism and eco-tourism activities that provide landowners with an alternative to development.

Research and Planning: The impacts of timeshare accommodations and the cruise industry were major concerns raised. Strategic directions suggested by meeting participants include:

- Address the impact of timeshare accommodations on business marketing;
- Inventory corporate versus personal timeshare accommodations for tourism planning;
- Identify and address the impact of cruise ships and the SuperFerry on pollution, marine life, businesses (such as whale-watching tours) and the spread of invasive species;
- Establish a forum for various agencies to discuss cruise industry impacts; and
- Review proposed harbor improvements in order to accommodate the cruise industry (harbor upgrades, agriculture inspection).

Safety and Security: Crime against visitors (primarily car break-ins) and visitor safety were major concerns voiced by meeting attendees who suggested strategic directions to enhance visitor safety including:

- Increase funds to support a special Maui County Police Department (MPD) unit to target visitor crimes;
- Increase assignments to patrol parking lots at natural resource sites frequented by visitors;
- Advocate for mandatory sentencing of criminals with repeat convictions for car break-ins;
- Enhance citizen patrols and other volunteer police programs;
- Educate visitors about potential for crime and hazards in hiking, swimming and driving by directing visitors away from dangerous and fragile areas, providing information in visitor publications, evaluating the sites promoted to visitors by guidebooks and websites, using precautionary symbols when advertising sites, negotiating with airlines to show an educational video for visitors on all incoming flights, providing or improving safety signage and encouraging hotels to provide safety information on the in-room channel;
- Improve safety of Haleakala downhill bicycle tours by informing visitors that the tour is not a leisurely ride, advising visitors about dangerous areas, making tour operators more responsible for visitors' safety, revising routes, enforcing traffic rules and controlling tours better;
- Require safety education for tour providers as part of a permitting process;
- Develop a certification program for tour providers;
- Provide lifeguards at various State beach parks, and park rangers and ambassadors at natural resource sites;
- Keep all small airports open to facilitate Air Ambulance Service for Maui residents and visitors in rural areas;
- Develop a statewide alert system in emergency situations (use Maui's system as an example).

Tourism Product Development: Discussion focused on enhancing the visitor experience, especially by organizing successful events. Meeting attendees suggested the following strategic directions:

- Support interpretive plans and the installation of interpretive signage;
- Expand events with potential for growth;
- Obtain private sponsorship for statewide events such as the Aloha Festival;
- Support eco-tourism and agri-tourism niches through review and revision of land use policies; and
- Provide technical support to small event organizers through a mentoring program and database of event supplies.

Workforce Development: Discussion focused on the need to present visitor industry career opportunities to young adults and children. Another concern was for inaccurate information about

Hawai'i being provided to visitors by some industry workers. Strategic directions suggested by meeting participants include:

- Increase funding and schools and teachers' support for the Academy of Travel and Tourism (AOTT) program;
- Expand the AOTT program throughout Maui County high schools;
- Increase participation in the AOTT program by increasing awareness among younger students;
- Encourage UH TIM to increase recruitment of local students and provide scholarships to residents, especially AOTT graduates;
- Increase partnerships between schools and the visitor industry (such as the hotel "embrace-a-school" program);
- Increase the number of residents in middle-management positions;
- Educate tour operators, hotel managers and decision-makers about Hawai'i;
- Require educational training programs for the visitor industry workforce;
- Develop a mandatory safety training program for tour providers as part of a licensing process; and
- Develop a certification program for tour providers.

ISLAND OF MOLOKA‘I

Access: Major access issues were the high cost of inter-island air travel and the need for airlines to be more responsible to Hawai‘i residents.

Airports and Airlift

- Improve access to the island by increasing flights to and from Moloka‘i;
- Encourage inter-island air service providers to be more responsible to residents;
- Reestablish kamaaina fares;
- Prevent airfares from further increases;
- Provide agriculture inspection at the Molokai Airport, so that travelers do not need to check-in again in Honolulu, and
- Improve the traveler experience by providing lockers or luggage storage services at Honolulu and Kahului International Airports or reducing/eliminating fees for extra baggage;

Harbors and Vessels

- Improve infrastructure at Kaunakakai Wharf, and
- Prepare a plan for the area between Kaunakakai Town and Kaunakakai Wharf.

Roads and Ground Transportation

- Provide shuttle service at Kaunakakai Harbor for ferry users who need to rent cars.

Communications and Outreach: One of the major issues raised in Moloka‘i was the need for more community participation in tourism. Meeting participants discussed the importance of Hawaiian culture to Moloka‘i residents and that culture is one of the things that attract visitors, therefore resident attitudes affect visitors’ experiences. They also suggested the following strategic directions:

- Encourage more community participation in tourism planning;
- Support Hawaiian cultural education programs;
- Ensure that tourism in Moloka‘i is based on culture and supported by the community; and
- Allow a non-profit organization or Hawaiian homesteaders to manage Malama Park and Pālā‘au State Park.

Hawaiian Culture: Meeting participants were concerned about the use of Native Hawaiian cultural sites and the portrayal of Moloka‘i and Native Hawaiians in marketing. They suggested the following strategic directions to perpetuate Native Hawaiian culture:

- Identify Native Hawaiian cultural sites that should and should not be accessible to the public;
- Establish a system of guardians to determine accessibility to Hawaiian cultural sites;
- Encourage collaboration between Hawaiian cultural practitioners, the community and the visitor industry;
- Enhance the visitor experience at cultural sites appropriate for visitation by providing interpretive signage, cultural guides or other services;
- Develop more cultural sites and activities in mauka areas;
- Establish a cultural education program and a cultural center for residents as well as visitors;
- Ensure the accurate portrayal of the Native Hawaiian culture and community in marketing campaigns; and
- Educate visitors and the visitor industry about Hawaiian culture.

Marketing: Major concerns were for the marketing of Moloka‘i and the inaccurate portrayal of Moloka‘i and Native Hawaiian culture in tourism marketing campaigns. Meeting participants suggested marketing strategies including:

- Obtain accurate visitor counts in order to market and plan for tourism;
- Conduct no marketing of Moloka‘i until the *Moloka‘i Island Plan* is complete;
- Ensure that marketing coincides with all of Moloka‘i’s tourism plans;

- Allow Moloka‘i to market itself instead of being marketed at the Maui County level; and
- Increase visitor expenditure by targeting preferred visitors and attracting more neighbor island residents as visitors

Natural Resources: Major concerns were the disrepair of Pala‘au State Park and the depletion of natural resources. Strategic directions suggested to protect natural resources include:

- Provide interpretive information at sites frequented by visitors;
- Repair and better maintain Pala‘au State Park;
- Educate children about the importance of natural resource sites to deter further vandalism;
- Protect groundwater, marine resources and forests;
- Prevent the invasion of alien species;
- Address the impacts of commercial tour kayaks (such as those at Kawela, where sea turtles nest);
- Provide more open space, fields and parks; and
- Organize volunteer beach clean-up and recycling programs.

Research and Planning: Moloka‘i meeting participants discussed the uniqueness of their island and the need to “keep Moloka‘i Moloka‘i” with tourism. Strategic directions suggested include:

- Prevent tourism from controlling the island by fostering tourism planning and encouraging community participation;
- Enable Moloka‘i to accommodate residents and visitors by improving drainage at Kawela Bridge and infrastructure at Kaunakakai Wharf, providing restrooms in Kaunakakai Town, preparing a plan for the area between Kaunakakai Town and Kaunakakai Wharf, and developing management plans for specific beach and water activities in areas with conflicting users.

Safety and Security: Meeting attendees emphasized that what is safe for residents is safe for visitors, and suggested the following strategic directions to enhance visitor and resident safety:

- Address safety on dangerous roads to Mo‘omomi Bay, Pāpōhaku Beach, Kamakou Preserve and Halawa Valley;
- Develop a daily alert program for dangerous weather and road conditions;
- Enforce rental car rules and fines for visitors taking rental cars on roads requiring four-wheel-drive vehicles;
- Develop a plan to shelter visitors during emergency situations; and
- Educate visitors about safety and cultural protocol by distributing brochures at airports, visitor accommodations and rental car companies; providing or improving safety signage at beaches, parks and trails; and developing a visitor orientation program.

Tourism Product Development: Meeting participants emphasized the importance of Native Hawaiian culture to Moloka‘i residents and that Moloka‘i is a niche in itself. They also suggested the following:

- Focus on the cultural heritage of Moloka‘i (the environment and people);
- Develop community-based events for residents, and if visitors want to attend they are welcomed;
- Review the Product Enrichment Program criteria to allow more community-based events;
- Continue to provide adventure activities unique to the world; and
- Support edu-tourism efforts such as providing Hawaiian cultural practice and training opportunities for residents (that may also be of interest to visitors) and providing educational activities for neighbor island students.

Workforce Development: The visitor industry's understanding of Native Hawaiian culture was a major concern raised by meeting attendees who suggested the following:

- Educate the visitor industry workforce and other businesses (banks, restaurants, retail) in Hawaiian culture, hospitality and customer service;
- Provide Hawaiian cultural training for eco-tourism and cultural tourism providers;
- Establish a visitor industry training program (similar to the Academy of Travel and Tourism (AOTT)); and
- Expand the summer internship program in high schools to provide Moloka'i students with work skills and experience.



APPENDIX **C**

LISTING OF
RESEARCH, STUDIES,
AND OTHER REFERENCES

APPENDIX C

Listing of Research, Studies, and Other References

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