

# O'AHU

## DESTINATION MANAGEMENT ACTION PLAN 2021–2024

*O'ahu ka 'ōnohi o nā kai*

O'ahu, the center of the seas

HAWAII TOURISM  
AUTHORITY



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**ON THE COVER** *This ‘ōlelo no‘eau speaks of O’ahu as the principal island of the group - that special gem.*

‘Ōlelo No‘eau—Hawai’i Proverbs & Poetical Sayings by Mary Kawena Pukui, Number 2353.



# I. Introduction

## **PURPOSE OF THE PLAN**

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

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

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

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

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

The idea of “regenerative tourism” gained momentum in 2020, as the global COVID-19 pandemic has increased awareness of tourism's opportunities and vulnerabilities. What is regenerative tourism? About 15 years ago, the model for “sustainable tourism” was instituted, built on tourism that was environmentally friendly, culturally sensitive and had less impact than high numbers of visitors. Regenerative tourism takes sustainability one step further and focuses on the net benefit of the visitor economy to a destination, looking at social and cultural benefits and costs.

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

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



## FORMATION OF THE DMAP

The process of the development of the O'ahu DMAP started with HTA, the City & County of Honolulu's Office of Economic Revitalization and the O'ahu Visitors Bureau (OVB) developing a list of O'ahu stakeholders who represented the visitor industry sectors (hotel, attractions, activities), other business sectors (e.g. agriculture, retail), the community (e.g. Hawaiian culture, education, regional), and other nonprofit organizations. They also represented the communities that they live in. Invitations were sent, and 23 members volunteered their time to participate on the O'ahu Steering Committee (see Acknowledgement section).

During the first Steering Committee virtual meeting, the members reviewed HTA's Strategic Plan, including HTA's key performance indicators and four pillars, which is the foundation of the O'ahu DMAP. The group

critically examined destination attributes valued only by residents, only by visitors, and by both residents and visitors, as well as those that are at-risk or threatened. The Steering Committee also discussed several goals and a vision for tourism on O'ahu. From there, they brainstormed actions – what to protect or mitigate, what to preserve or grow, and where the gap can be closed or bridged. During subsequent meetings, the actions were grouped, and overarching anchor actions and sub-actions were identified. The proposed actions were then presented to residents during two virtual community presentations on May 4 and 5, 2021. The community was encouraged to provide their input during the presentations as well as through an online input form.

After reviewing the community feedback, the Steering Committee met virtually. They revised the actions and ranked the anchor actions in order of importance. HTA staff, the City and OVB reviewed the proposed actions to confirm they could be done under their respective purviews. The Steering Committee held additional meetings to review the revised list of actions and provide comments and adjustments. All of the anchor actions were developed by the Steering Committee with input from the community.

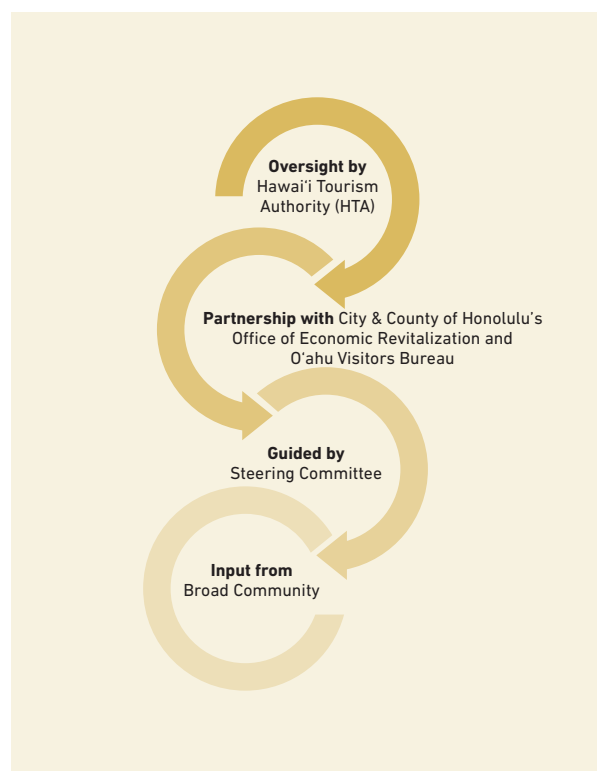


Figure 1 Collaborative Process

## IMPLEMENTATION FRAMEWORK

Hawai'i's tourism industry is at a critical point and residents' livelihoods depend on the recovery of the visitor industry – directly or indirectly. Tourism needs to be managed responsibly so that residents and destinations can thrive. HTA is leading many of the efforts in the O'ahu Destination Management Action Plan. However, there needs to be collaboration and support from other state and county agencies, the community, the visitor industry and other sectors, to help move the actions forward. This is a three-year plan and a living document that will be evaluated annually against key performance indicators.



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

‘OLELO NO‘EAU (HAWAIIAN PROVERB)

## II. Overview of Tourism in Hawai‘i

### STATEWIDE TRENDS

Tourism has remained the primary economic driver for Hawai‘i’s economy across all islands. In 2019, tourism was 16.2% of Hawai‘i Gross Domestic Product (GDP), second to real estate and rental and leasing at 18.8% of Hawai‘i GDP. Jobs in the tourism industry accounted for 20% of total jobs in Hawai‘i while jobs in the real estate and rental and leasing sector accounted for 4.4% of total jobs. For eight consecutive years, the State of Hawai‘i’s visitor industry sustained annual growth in terms of arrivals and expenditures. In 2019, tourism was the largest single source of private capital for Hawai‘i’s economy. Total visitor spending reached \$17.84 billion (1.1% increase compared to 2018).

Tourism generated \$2.08 billion in state tax revenue. A total of 10,424,995 visitors came to the Hawaiian Islands by either air service or cruise ship (5.4% increase over 2018).

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

Prior to the global COVID-19 pandemic, 2020 was set to be another year of unprecedented growth for Hawai'i. However, flight cancellations to the Hawaiian Islands due to the pandemic began in February 2020, initially affecting the China market. On March 14, 2020, the Centers for Disease Control and Prevention (CDC) began enforcing its "No Sail Order" on cruise ships. On March 17, Hawai'i Governor David Ige asked upcoming visitors to postpone their trips for at least the next 30 days. The counties also began issuing stay-at-home orders. Effective March 26, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine. By the end of March, most flights to Hawai'i were cancelled, and the visitor industry was severely impacted. On April 1, the mandatory self-quarantine was extended to inter-island travel.

In 2020, total visitor arrivals declined 73.8 percent from the previous year to 2,716,195 visitors. There were significantly fewer arrivals by air service (-73.8% to 2,686,403). Arrivals by cruise ships (-79.2% to 29,792) also decreased considerably, as cruise ships were operating for only the first few months of the year. Total visitor days fell 68.2 percent.

Visitor arrivals by air service decreased sharply in 2020 from the U.S. West (-71.6% to 1,306,388), U.S. East (-70.3% to 676,061), Japan (-81.1% to 297,243), Canada (-70.2% to 161,201) and All Other International Markets (-80.4% to 245,510).



Hawai'i's unemployment rate increased from 2.0 percent in the first quarter of 2020 to 19.4 percent in the second quarter. After this peak, the unemployment rate continually declined to 14.5 percent in the third quarter, 11.2 percent in the fourth quarter, and then 7.7 percent in the second quarter of 2021.

## RESIDENT SENTIMENT

HTA conducts an annual Resident Sentiment Survey (RSS) to gauge resident attitudes toward tourism in Hawai'i and to identify perceived positive and negative

impacts of the visitor industry on residents. Positive resident sentiment is important to maintain a healthy industry. The 2019 RSS report showed that resident sentiment had generally weakened compared to the previous year. By extension, the quality of the visitor experience will likely decline if this trend continues. For now, the two are inexorably linked and changes are necessary to improve resident sentiment – there must be a better balance of economic, social and cultural, and community benefits from tourism. Providing residents with a voice in tourism development, creating jobs with opportunities for advancement, and creating shopping, dining and entertainment opportunities are key to improving resident sentiment.

## TOURISM FORECAST

According to the Department of Business, Economic Development and Tourism's (DBEDT) 2021 Second Quarter Outlook for the Economy, visitor spending will increase 117.8 percent in 2021, to \$11.1 billion, a 38 percent decline in expenditures from the pre-pandemic 2019 results. Visitor spending will then increase 34.0 percent in 2022, 12.9 percent in 2023, and 7.2 percent in 2024. Hawai'i is expected to welcome 6.6 million visitors in 2021, a 36 percent decrease from 2019. Visitor arrivals are anticipated to increase to 8.6 million in 2022, 9.5 million in 2023, and 10.1 million in 2024.

DBEDT projects that for 2021, the average annual unemployment rate will be 7.7 percent, then decrease to 6.3 percent in 2022, 5.6 percent in 2023, and 5.0 percent in 2024. These rates are much higher than Hawai'i's average unemployment rate of 2.5 percent from 2017 to 2019.

## TOURISM ON O'AHU

Riding the surge of global travel in 2019, O'ahu saw visitor arrivals reach a record 6.15 million visitors. Those visitors contributed \$8.14 billion in expenditures to Hawai'i's economy. On average, visitors stayed 6.8 days and spent \$195 per person per day.

Tourism on O'ahu accounted for 45.6 percent of all tourism spending in Hawai'i and supported 99,152 jobs (direct, indirect and induced).

There were 8.3 million scheduled trans-Pacific air seats to the Daniel K. Inouye International Airport (HNL) – 4.0 million from U.S. West, 0.9 million from U.S. East, 1.9 million from Japan and 1.5 million from other countries. On O'ahu there were 39,240 visitor lodging units, including 27,060 hotel units, 3,956 condo hotel units, 3,821 vacation rental units, 3,782 time-share units, and 621 other types of units.





O'ahu had an average hotel occupancy of 84 percent and an average daily rate of \$235. Other visitor accommodations were also experiencing boom times (timeshare: 95% occupancy, vacation rentals: 75% occupancy). Approximately 60 percent of visitors stayed in hotels, while condo (10%), timeshare (10%) and rental houses (10%) were also well used.

Visitors commented that O'ahu needed to improve its traffic situation which ultimately impacted their travel experience. They also stated that the island needed more local cultural experiences.

Overall 79 percent of O'ahu visitors gave it high satisfaction marks<sup>1</sup>. However, a study by Destination-NEXT<sup>2</sup> found some concern that O'ahu had issues with accessibility for disabled, walkability and bikeability, needed improvement in public Wi-Fi, and did not have enough outdoor recreation and sports facilities.

Visitors did less self-directed tours and driving around O'ahu than on the other islands. Similar to the other islands, visitors visited the beach for sunbathing. However, they were less likely to swim in the ocean or hike.

At the same time, O'ahu residents strongly felt that overcrowding, traffic problems, damage to the environment, and increased cost of living were problems being caused by tourism. Resident sentiment towards tourism had significantly weakened in 2019 compared to the previous year (the percentage of residents who said that the overall impact tourism had on their family was extremely positive was 24 percent positive in 2018 but 16 percent in 2019).<sup>3</sup>

Then in 2020, the consequences of the global pandemic resulted in visitor counts dropping 75 percent compared to the previous year. The number

of direct air seats into O'ahu fell 60 percent. The visitor industry decline also resulted in a loss of jobs on O'ahu, with accommodation jobs down 48 percent (-9,200 jobs) and food service, restaurants and drinking places losing 15,900 jobs for a 33 percent loss.

In May 2021, there were 310,744 visitors to O'ahu, compared to 508,088 visitors in May 2019. Visitor spending was \$418.3 million, down 39.5 percent from \$691.1 million in May 2019. The average daily census showed that there were 80,895 visitors per day on O'ahu in May 2021, compared to 109,584 visitors per day in May 2019.

Through the first five months of 2021, there were 925,147 visitors to O'ahu compared to 2,462,487 visitors (-62.4%) in year-to-date 2019, and total visitor spending of \$1.24 billion represented a 62.2 percent decrease from \$3.29 billion in year-to-date 2019.

As more visitors arrive in the islands, the overall visitor satisfaction is trending downward from 85 percent rating their trip excellent at the beginning of 2021 to 76 percent in June 2021.<sup>4</sup> The top complaints included limited capacity and availability of restaurants and attractions as well as finding Hawai'i too crowded. Further, fewer visitors indicated they did all the activities that they had planned for.

In the most recent Resident Sentiment Study<sup>5</sup> released in June 2021, 55 percent of O'ahu residents felt that tourism has brought more benefits than problems. This rating was higher than the other counties but had gone down slightly from 61 percent in 2019. On the regional level, residents were particularly critical of tourism and its impact on the Wai'anae, Windward and North Shore communities.

<sup>1</sup> Satisfaction: The percent of visitors who rated a 7 or 8 on a scale where 1=Poor and 8=Excellent.

<sup>2</sup> DestinationNEXT Multi-User Diagnostic Assessment: Hawai'i Statewide, Destinations International and MMGY NextFactor, December 30, 2019.

<sup>3</sup> HTA Resident Sentiment Survey 2019 Highlights, February 2020. Field dates: September 27 to November 14, 2019.

<sup>4</sup> HTA Visitor COVID-19 Study, June 2021. Among visitors to Hawai'i from the U.S. Mainland who visited Hawai'i from May 15-24, 2021.

<sup>5</sup> HTA Resident Sentiment Survey 2021 Highlights, June 2021. Fielding dates: April 27 through June 2, 2021.

Residents were also asked to rate the importance of specific strategies for the state to better manage tourism.<sup>5</sup>

- **88%** of O'ahu residents said that it was important for the state to educate visitors and residents to mālama the islands and each other
- **74%** - eliminate illegal vacation rentals on my island
- **71%** - charge visitors access fees to state parks and trails
- **66%** - encourage visitors to volunteer and give back during visits to Hawai'i
- **64%** - not allow building of additional hotel/condo/timeshare units on my island
- **62%** - stop approval of additional legal vacation rentals on my island
- **57%** - designate resident-only days at some state parks, beaches and trails

O'ahu residents also said that the top problems created by tourism in Hawai'i were overcrowding, traffic, damage to the environment, and too great a dependency on tourism.

<sup>5</sup> HTA Resident Sentiment Survey 2021 Highlights, June 2021. Fielding dates: April 27 through June 2, 2021.



## SITUATION ANALYSIS SUMMARY

As a part of the DMAP process, a SWOT analysis was conducted by the Steering Committee members who identified the destination's existing strengths and problems, as well as opportunities and threats present in the external environment. The SWOT analysis is a useful tool in the decision-making process, as it can be used to evaluate strategic positioning, as well as identify projects that would be reasonable to execute in the short term. This feedback was supplemented with research and data that helped to support the observations that were made. The information below provides more details on each section of the SWOT analysis matrix shown on Table 1, page 16.

## Strengths

**Safety.** O'ahu, along with the State of Hawai'i is generally perceived as a "safe" destination.

- The State and the City and County of Honolulu have prioritized safety and health during the pandemic. As O'ahu moves forward, these systematic prioritizations and strategies on testing, vaccination, quarantine of travelers, Safe Travels, and other safety measures have resulted in some of the lowest numbers of COVID infection cases and deaths in the U.S. This further speaks to and confirms the validity and perception of O'ahu (and Hawai'i) as generally being a safe destination that prioritizes health and safety for residents, community and visitors.
- Hawai'i's violent crime rate in 2021 (2.9 incidents per 1,000) is lower than the national rate of 3.7.

**Depth of Product.** O'ahu's "Town & Country Experiences, All On One Island" positioning continues to set O'ahu apart from the other Hawaiian Islands and is generally unique for Pacific Island destinations. Alongside O'ahu's offerings of Hawaiian cultural and historical experiences, O'ahu boasts a robust multi-cultural community with a wide range of experiences.

- O'ahu has the highest number of visitor accommodation units, venue space, ground transportation, air transportation (flights) and experiential infrastructure than any other Hawaiian Island, lending itself to better accommodating the needs of both the leisure and meetings markets.
- Honolulu Harbor is the embarkation or disembarkation point for most cruise ships resulting in additional pre- or post- cruise stays on island.

**Natural Beauty.** Natural beauty and outdoor experiences have not been compromised during the pandemic and continue to exist around O'ahu.

- Due to the pandemic, residents experienced lockdowns and were encouraged to minimize activities away from home. Visitors were also absent from the island. This has given many natural sites a brief moment to rejuvenate due to the separation from human overuse. Hanauma Bay is a good example of this.

- After the "stay/work at home" lockdown throughout the State, country and globally, O'ahu's beauty and outdoor experiences are highly attractive to those with pent-up travel desires.
- Many of O'ahu's natural sites and outdoor recreational areas are accessible to residents and visitors because of the City's well-developed roads and transportation infrastructure.

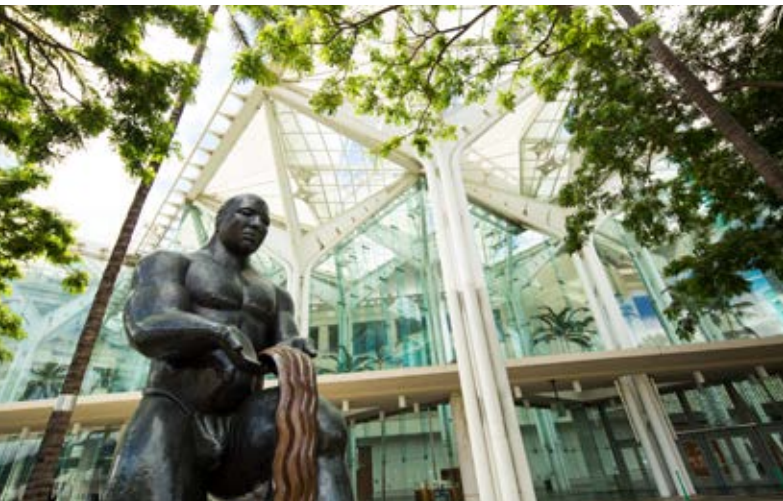
**Tourism Jobs and Workforce.** Availability of a professional workforce and time-tested training infrastructure.

- The pandemic has brought about some of the highest layoffs and furloughs. However, O'ahu has the largest pool of tourism workers compared to the other islands, giving it an advantage to having the right number of skilled workers necessary for the recovery period.
- O'ahu has multiple universities and colleges that can develop and provide education and workforce training programs.

**Appeal.** O'ahu has traditionally had a strong international appeal. O'ahu attracted an even mix of 50% domestic and 50% international visitors, prior to the pandemic.

- Historically, market mix was an O'ahu strength. Currently, it can be construed also as a weakness due to the impact of closed international borders and travel. However, O'ahu hopes to see this dynamic return as the world returns to normalcy in the future.

**Meetings and Conventions.** O'ahu draws more meetings than any other island and offers a multitude of convention and incentive opportunities, including the Hawai'i Convention Center. The meetings traveler spends significantly more than the leisure visitor. Convention and business meetings also generate ancillary spending in the destination through the rental of event space, equipment leasing, and corporate hospitality functions.



## Problems

**Hotspots.** Recreational sites, attractions and communities are overtaxed by crowds or inadequate infrastructure creating many “hotspots” where residents and visitors compete for access to the same resources and locations.

- The Steering Committee felt that 6.15 million visitors in 2019 was too much for the current infrastructure, natural resources and residents’ quality of life. The group cited intrusion into residential neighborhoods, inadequate maintenance and enforcement, inconsistencies in park policies and reservation systems, and lack of/or poor infrastructure in parks, beaches, and bathrooms.

**Illegal Vacation Rentals.** The County policy on transient vacation rentals is the most restrictive of all the counties; and this policy is still not fully resolved, etc.

**Cost of Travel.** Due to current pandemic policies in place, the cost to travel to O’ahu includes testing costs, higher accommodation rates, additional fees and more, increasing the travel cost. The limited availability of attractions and rental cars has also driven up prices. Unfortunately, the cost to visit Hawai’i does not always match up to the expected level of service and experiences. These costs are expected to be temporary but for how long, is unknown.

**Product Decline.** Many of O’ahu’s experiences, including but not limited to accommodations, attractions, activities, tours, restaurants, and festivals and events, that provide the destination’s depth of products may not survive the economic impact of the pandemic. Therefore, O’ahu will have less to offer.

- Most visitor industry businesses are facing challenges of reopening to full capacity, impacting the O’ahu travel experience, which could impact a prospective visitor’s travel decision.
- Native Hawaiian-owned firms in the tourism sector are smaller in terms of employment size, lower annual average wage, and lower annual sales per firm as compared with state averages and are



therefore more at risk for failure. Their loss could lead to fewer authentic experiences in culture, art, entertainment, and recreation.

**Marketing and Destination Management Budget Cuts.** HTA and its Global Marketing Team (GMT), including the Hawai’i Visitors and Convention Bureau (HVCB), as well as the O’ahu Visitors Bureau, have seen and will continue to experience reduced funding for crucial management efforts of the destination related to community, environment, and culture. This includes budget cuts for marketing efforts necessary to kickstart the tourism economy, effectively target the appropriate type of visitor, and compete with other

destinations that are aggressively focused on capturing the same market share.

- In 2021, and for the next several years, State tax collections and revenue might be significantly reduced due to a slower economy. This will most likely result in cuts to tourism funding and, subsequently, a lack of ability to provide desired contracted services to manage and market tourism.
- The Legislature repealed the Tourism Special Fund and Transient Accommodation Tax allocation to the counties through the passing of HB862. This created an uncertainty in the source of tourism funding.
- O'ahu continues to be the only island that does not receive county resources (budget and otherwise) to help with O'ahu's tourism efforts and marketing.

***Unemployment and Workforce.*** Currently, the State's dependency on tourism has contributed to one of the highest unemployment rates in the nation, resulting in a severe downturn in the local economy. The rate of recovery for O'ahu's tourism industry may vary and is unknown. Due to the pandemic, much of O'ahu's travel related workforce was furloughed or eliminated. This poses two problems. After a long period of not working, bringing back this workforce will require much training, time and resources to bring the level of service back to where it was or should be.

In the meantime, the brand's delivery of quality service may be tarnished. Secondly, the exodus of residents may have continued during the pandemic as talent was drawn out-of-state to look for jobs elsewhere.

Native Hawaiians accounted for 16 percent of the total workers in the tourism sector. However, their average wage and salary income was lower than the state level in each of the tourism-intensive industries, especially in the real estate and rental and leasing industry where Native Hawaiians on average earned only three fourths as much as the industry level. Understanding why Native Hawaiians are underrepresented in our largest industry and how to increase employment is critical to addressing diversity, equity and inclusion in the visitor industry.

***Resident Sentiment.*** Many residents do not fully comprehend the economic impact of Hawai'i's tourism industry and the number of businesses and jobs that are integrated into this industry.

- Growing negative resident sentiment amongst those unaffected by the tourism downturn may still perceive visitors as reckless "carriers of COVID" and endangering their community. They may view the loss of visitors as a benefit to O'ahu, rather than a problem.
- Many hotspots on O'ahu result from the island's large resident population and visitors vying for access to the same resources and locations.





**Recovery of International Travel.** O'ahu typically attracts 50% domestic and 50% international visitors. However, due to closed international travel and borders (many closed through parts of the year), the difficulty of traveling for international visitors into the U.S. has reduced O'ahu's visitor numbers and diverse mix drastically.

- With reductions in flights and travel from international markets, the domestic market is insufficient to support current capacities required for a healthy recovery. It also puts competitive pressure amongst O'ahu and the other islands.

## Opportunities

**Travel Desire, Travel Patterns.** Not all sectors of the U.S. and global economy have suffered during the pandemic, allowing for a portion of the population to still have discretionary income. Though income behavior and attitudes towards discretionary income may have changed, people who can afford travel want to escape the pandemic stress. A spike in travel from those who feel healthy and financially stable is anticipated.

- Hawai'i ranks as a top desired destination. For most Americans, beach destinations are priorities as their first post-pandemic trip. While California and Florida would also be sun and sand domestic competitors, those states were also hubs for large COVID-19 outbreaks.

**Vaccinations.** Individuals' confidence to travel increases tremendously with the knowledge that vaccinations, protocols and testing is making it safe to travel.

**Safety and Health.** Hawai'i's diligence in managing COVID-19 has provided a very positive and respected perception of Hawai'i as a destination that cares about its residents, community, and visitors. This has positive implications for O'ahu and the other counties.

**Competitive Destinations' Recovery Moving Slower.** Some competitive destinations that appeal to Hawai'i's Avid Traveler (i.e., Thailand, Costa Rica, Australia, etc.) lag Hawai'i in its recovery and marketing efforts, due to slower vaccination availability and dissemination, closed borders and travel restrictions.

**International Travelers.** O'ahu has the infrastructure and language capabilities to support an increased number of international visitors who have higher expenditures and show a higher propensity to follow respectful travel guidelines and engage in Mālama Hawai'i practices.

- Many top competitors for international visitors were the hardest hit. Top competing destinations (i.e., California, Florida, Europe, etc.) were considered the hotbeds of the virus and there may be residual fear and avoidance of these destinations especially with travelers from Asia.
- The State has already created cooperative solutions to welcome major international markets (Japan, Korea, Canada, and Philippines) that still find it difficult to enter other countries.

**Rebrand the Hawai'i Experience.** The recovery period can be used to guide and manage tourism messaging and products to better align with regenerative tourism goals.

- Benefit from the movement to buy and consume local, seek authentic experiences, minimize carbon footprints, and support communities.
- Compensate local community members who share their mana'ō of their place. This creates a transformative and healing experience.
- Rethink marketing to educate and share with visitors, pre-arrival, so they can be better stewards while they are on O'ahu.
- Offer viable options to control visitor movement.
- Involve residents in the experiences offered to visitors.

**Industry Partnerships.** Industry members can capitalize on the relationships with hotels and airlines developed during the pandemic to create campaigns about safety protocols that may instill trust and confidence in potential travelers.

- Build broader industry support of sustainable environmental practices.

**Managing Visitors.** The increased cost of visiting Hawai'i does not have to solely be viewed as a problem or threat. It can be an opportunity to attract the right visitors, albeit less of them.

**Diversifying the Economy.** To discover new and innovative ways to diversify the economy beyond tourism, consider other industries that can support the visitor infrastructure such as the film industry which typically brings in higher wage-earning short-term workers that could compensate for leisure visitors. There is also the potential to recruit long-term stay visitors who can work remotely.

## Threats

**Airline and Cruise Industry Uncertainty.** The primary way to visit O'ahu and the Hawaiian Islands is by air travel. Concern arises with the possibility of airlines diverting aircrafts once international destinations reopen, and not knowing the recovery strategies of the airlines. Flight/aircraft reconfiguration for social distancing and required cleaning protocols would further increase the cost of air travel. In addition, cruise ship scheduling is dependent on the availability and placement of ships in other destinations.

**Consumer Confidence in Flying and Traveling.** The perceived safety of traveling on commercial airlines and cruise ships is low. Additionally, many Americans may prefer to travel closer to home or within driving distance in 2021.





**Economic Recovery.** Economic recovery in both the U.S. and most of O'ahu's key international markets may be slow and uncertain. In turn, prospective visitors may choose to travel closer to home to save their discretionary income. Consumer confidence has taken a major hit in terms of personal finances and health and safety. Travel patterns and behaviors may change depending on the economic recovery and perceived need to use discretionary income differently.

**Regional Travel.** An extension of the local-slow movement, growing sentiment of American travelers to opt out of long-haul trips may result in deciding to explore more local and regional travel.

**Policies of Other Destinations.** Other destinations may relax their travel and/or quarantine mandates sooner than Hawai'i, opening themselves up as a more attractive travel option. O'ahu may lose the initial surge of travel due to lingering County and State protective measures and may face future challenges to remaining competitive.

**International Travel.** Many of O'ahu's international visitors are from countries with closed borders or travel restrictions. Additionally, the perceived lack of safety when traveling outside one's country may be the sentiment globally. This would continue to impact O'ahu, as half of O'ahu visitors are international travelers.

**Safety Concerns.** Due to the general fear of the virus and the new variants within the U.S. and from other countries, prospective visitors may still be cautious or possess residual fear for travel in 2021, and possibly into 2022 or even 2023.

- The uncertainty of policies in other states and countries that affect outbound travel may continue to limit or discourage travel to Hawai'i for some time.

**Competition.** As O'ahu moves forward in a post-pandemic environment, the island will face aggressive competition by all destinations who are open for business; even those not typically in its competitive set. Other destinations have already been assertive in their tourism recovery efforts. In addition, the costs to market to O'ahu's pre-pandemic customers may have increased. Potential policies pushing for additional fee collection will increase the cost of the visit and decrease the competitive advantage.



## Situational Analysis Summary

### Strengths

- Perceived as a safe and welcoming destination
- Multicultural community
- Vibrant local communities
- Natural beauty and outdoor experiences
- Unique Hawaiian culture and rich history
- Strong international appeal
- Time-tested professional hospitality infrastructure
- Greater depth and choice of activities, historical sites, and attractions than other destinations
- Convention and meeting facilities

### Opportunities

- Rebrand the Hawai'i experience
- Beach destinations rank high as the preferred vacation post-pandemic
- Capitalize on the possible near-term surge in visitors from those who feel healthy and financially stable or cannot or will not travel to other destinations
- Diversify the economy with industries that are complementary with the visitor industry.
- Industry partnerships for safety and environmental initiatives
- Increased cost for visiting Hawai'i and lower loads don't have to be only a problem or threat. These can be an opportunity to have less visitors, but the right visitors.
- Managing visitors

### Problems

- Many hotspots resulting from residents and visitors vying for access to the same resources and locations that are overtaxed by crowds or inadequate infrastructure
- The number of visitors in 2019 was perceived to be too much for the current infrastructure, natural resources and residents' quality of life
- Visitors' intrusion into residential neighborhoods
- Global pandemic has created wary residents who distrust outsiders (bringing in COVID, buying high-priced homes to live in)
- Reduced funding for crucial destination management and marketing efforts
- Many attractions, experiences and small businesses may not survive the pandemic
- Workforce not aligned with current needs
- Cost of travel
- Recovery of international travel
- Illegal vacation rentals add additional supply which allows high number of visitors
- Problematic visitors feel entitled to unlimited access, seek secret places, and desire to boast on social media

### Threats

- Economic opportunities tend to be valued more than natural and cultural resources
- Long-term trend towards more regional travel driven by generational segments that are less adventurous, push for localism, decreasing the travel carbon footprint, etc.
- Aggressive competition by all destinations



## III. Vision for O'ahu Tourism

The O'ahu DMAP vision was created based on feedback provided by the Steering Committee at multiple meetings.

*By 2024, together with the community, the visitor industry will be rooted in mālama – to take care of this place and each other. O'ahu will live in joy, abundance, and resilience because visitors and residents understand what is pono, share common goals, and have respect for each other and the environment.*

## IV. Goal

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



## V. Objectives

There are six objectives to achieve the goals and vision of the O'ahu DMAP.

### OBJECTIVE 1

Create positive contributions to the quality of life for O'ahu's residents.

### OBJECTIVE 2

Support the maintenance, enhancement, and protection of O'ahu's natural resources.

### OBJECTIVE 3

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

### OBJECTIVE 4

Maintain and improve visitor satisfaction of their experience on O'ahu.

### OBJECTIVE 5

Strengthen the economic contribution of O'ahu's visitor industry.

### OBJECTIVE 6

Increase communication and understanding between the residents and visitor industry.

## VI. Actions

The actions were developed by the Steering Committee and the community. In some cases, HTA took the essence of the community's feedback and input and turned it into an action.

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

- Reduce visitor impacts by improving infrastructure, actively managing sites, and decreasing the number of visitors.
- Desire for collaborative efforts among all industry partners in support of natural resources.
- Ensure a balance between the needs and wants of residents and visitors, and the well-being of O'ahu.
- If residents are not happy then visitors will sense that and will not have a good experience.
- We must manage the visitor experience with capacity limits at hotspots, promoting or allowing only selected experiences, and offering alternatives to move visitors away from hotspots.
- We must educate our visitors about respect for this land and its people.
- We must pivot towards regenerative tourism. Regenerative tourism is how tourism can make destinations better for both current and future generations.

The community made remarks about limiting the number of visitors to the island, as well as reducing the number of rental cars on O'ahu. Unfortunately, HTA has no control over these. The free movement of people to travel to the islands and between the islands falls under federal jurisdiction. Businesses are free to operate in Hawai'i as long as they do not break any laws. The goal of the DMAP presentations



was to gather input from the community regarding how best to manage tourism on the individual islands before and after the visitors arrive as well as how we mālama the visitors, and each other, once the visitors are here. This includes considerations around protecting our 'āina and perpetuating the Hawaiian culture. This does not, however, include deciding who can and cannot come to an island specifically, or to Hawai'i in general, since this is not in HTA's jurisdiction.

Much discussion was had on diversifying Hawai'i's economy to be less dependent on tourism and therefore decrease the risk of another global shock. There were also suggestions to increase efforts to bring in more sports events or support other similar industries. The State is already addressing this issue through its Hawai'i Economic Revitalization Task Force and other efforts through DBEDT. Therefore, the DMAP does not include any specific actions to address developing new industries or workforce retraining.

The following tables identify opportunities and needs for each of the anchor actions, including the identification of responsible agencies and timing of the action's commencement and/or delivery over a three-year period from September 2021 to August 2024. As HTA carries out the DMAP, there will be more organizations and businesses identified to help move this plan forward.

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



## O'AHU

### Action A

Decrease the total number of visitors to O'ahu to a manageable level by controlling the number of visitor accommodations and exploring changes to land use, zoning and airport policies.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
A.1	Lower the number of illegal short-term vacation rentals by supporting the County to improve enforcement of current regulations. Support the County in implementing new rules.	L = County – Dept. of Planning and Permitting S = HTA	X	X	X
A.2	Provide resources to engage communities and agencies to collaborate on additional rules; particularly to limit expansion of legal short-term vacation rentals outside of the resort areas.	L = HTA S = County, Community	X	X	
A.3	Commit resources to study methods of limiting supply such as: <ul style="list-style-type: none"> <li>Controlling new visitor accommodation development through building permits or approvals for new sites.</li> <li>Exploring changes to land use, zoning, airport policies, etc. that influence tourism infrastructure and ultimately determine the number of visitors that can access O'ahu sites.</li> </ul>	L = HTA S = County, Dept. of Transportation - Airports (DOT - Airports)	X	X	X

**Action B**

**Implement a pre- and post-arrival tourism communications program to encourage respectful and supportive behavior.**

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
B.1	Identify the best messaging and ways to reach and communicate with visitors prior to arrival.	L = HTA S = OVB, Global Marketing Team (GMT)	X		
B.2	Support Hawaiian cultural educational and training programs – including ‘Ōlelo Hawai‘i (Hawaiian language) for the employees in the visitor industry (e.g. hotels, tour guides).	L = HTA S = Native Hawaiian Hospitality Association (NaHHA)	X	X	X
B.3	Develop a messaging program (physical and virtual) to educate visitors and locals about significant sites or areas and pono practices related to them.	L = HTA S = OVB, GMT	X	X	X
B.4	Enhance the goHawaii app to include more real time information, road closures, events, local etiquette, resource protection, and areas that are off-limits.	L = HVCB S = HTA, OVB	X	X	
B.5	Boost the goHawaii app with geofencing capabilities to notify visitors when they are in proximity to a hotspot and redirect them to other more accessible areas through a reservation system.	L = HVCB S = HTA, GMT	X	X	
B.6	Promote use of the goHawaii app to travelers to encourage safe travels and communicate with them to understand where to go and not go.	L = GMT S = OVB	X	X	X
B.7	Provide visitors with other means of accessing information such as using artificial intelligence to answer visitor questions or share videos and pictures over smartphones to make it easy for visitors to engage.	L = HTA S = OVB, GMT		X	X



**Action C**

**Identify sites and implement stewardship plans for key hotspots on O'ahu.**

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
C.1	Work with stakeholders to identify sites associated with public impact on natural and cultural resources. Prioritize sites where: 1) communities and/or neighborhoods have issues with visitors; 2) conflicts exist within communities regarding visitors; or 3) residents' access and traditional cultural access need protection.	L = HTA  S = Dept. of Land and Natural Resources (DLNR), County, private landowners, communities	X	X	X
C.2	Work with communities to determine desired conditions or limits of acceptable change then identify management actions to achieve/sustain those conditions to ensure integrity and avert degradation of hotspots.	L = HTA  S = DLNR, County, private landowners, communities	X	X	X
C.3	Develop a process to support government and community collaboration on how to manage and steward sites. Determine if there are similar issues across some of the hotspots, so they can be addressed in a group or pilot program.	L = HTA  S = DLNR, County, private landowners, communities	X	X	X
C.4	Increase opportunities for community-led initiatives that steward and manage these resources, including closure of areas and managing traffic.	L = HTA  S = DLNR, County, private landowners, communities	X	X	X
C.5	Advocate for increased funding and resources for Department of Land and Natural Resources, City and County Department of Planning and Permitting, and City and County Parks and Recreation, to better manage hotspots.	L = HTA  S = Community, private sector	X	X	X
C.6	Investigate site user fees or hiking permits that go directly to support and manage specific hotspots and the affected communities. Review studies to determine whether site fees are warranted and how fees are to be processed and returned to that spot or community for maintenance, management and enforcement. Evaluate if the fees are working.	L = DLNR, County  S = HTA	X	X	X
C.7	Explore the process of requiring hikers to apply for and acquire a hiking permit. Fees would also go to reimburse search and rescue expenses. The process would include mandatory education on safety and protocol while hiking.	L = DLNR, County  S = HTA	X	X	

### Action D

Increase enforcement and active management of sites and trails.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
D.1	Explore ways to improve enforcement of parking rules at hotspots and popular visitor attractions. Crack down on illegal tour vans and buses dropping people off at beaches and trails.	L = County, State Public Utilities Commission (PUC)  S = HTA, community	X	X	
D.2	Increase biosecurity at Daniel K. Inouye International Airport and trails. <ul style="list-style-type: none"> <li>Promote sanitation protocols for cleaning gear.</li> <li>Encourage responsible visitor practices like cleaning gear at hiking trails and not tracking in invasive species.</li> </ul>	L = Dept. Of Agriculture (DOA), DLNR/Division of Forestry & Wildlife, Hawai'i Invasive Species Council  S = HTA, County, GMT, community	X	X	

### Action E

Develop a reservation system to monitor and manage users at natural resource and cultural sites.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
E.1	Explore a reservation system and demand-based fee pricing at popular sites and hotspots.	L = HTA  S = HVCB, County, DLNR	X		
E.2	Evaluate the current reservation systems at Hanauma Bay and Lē'ahi to support a sustainable capacity of visitors and advocate for expansion to other hotspots on the island.	L = HTA  S = DLNR, County	X		
E.3	Pilot a program for a statewide reservation system that can redistribute excess demand to other sites or to other participating attractions.	L = HTA  S = HVCB, County, DLNR	X	X	

**Action F**

Establish a “Regenerative Tourism Fee” that directly supports programs to regenerate Hawai‘i’s resources, protect natural resources, and address unfunded conservation liabilities.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
F.1	Identify how to legally collect this fee (State gives the County the authority to establish such a fee), distribute this type of fee, and develop accountability measures. The fee would support the management system, impacted communities, and workforce development in jobs related to invasive species removal, fishpond restoration, coral growing, and native ecosystem restoration.	L = HTA  S = DLNR, City and County Parks and Recreation	X	X	
F.1a	Educate the visitor industry on the need for the fee and how it signifies visitor industry contribution to sustainability.	L = HTA  S = OVB		X	
F.1b	Share with the traveler/visitor about how the fee would be used to enhance their visit by protecting the place.	L = HTA  S = GMT, OVB			X

**Action G**

**Develop and implement marketing programs to attract positive-impact travelers who prioritize the environment, culture and investing in our local community.**

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
G.1	Continue to develop and focus marketing messaging to market segments that appreciate learning about unique cultures and natural resources.	L = HTA S = OVB, GMT	X	X	X
G.2	Continue to develop plans to attract higher spending travelers (i.e., meetings, conventions and incentives (MCI) visitors, weddings, business travelers, medical tourism, LGBTQ, and arts and culture).	L = HTA S = OVB, GMT	X	X	X
G.3	Continue to reassess and adjust marketing O'ahu with context and not just surf and sand. Include island values, prioritize environment and culture to attract the right kind of visitors.	L = HTA S = OVB, GMT	X	X	X
G.4	Use marketing campaigns as an opportunity for visitors to connect with O'ahu on a deeper level through immersive experiences, and travel in a way that enriches their lives while giving back to the communities they are fortunate enough to visit.	L = HTA S = OVB, GMT	X	X	X
G.5	Continue to develop campaigns to shift visitation from peak periods to slower shoulder periods.	L = HTA S = OVB, GMT	X	X	X
G.6	Be intentional about what we promote to ensure that it is authentic. Enhance the current "The Hawaiian Islands" brand guidelines for the industry partners and encourage consistent use.	L = HTA S = OVB, GMT, visitor industry	X	X	X
G.7	Develop metrics and collect data to measure marketing effectiveness beyond the economic impacts (e.g., Aloha+ Challenge measures, acceptance of tourism by local residents, visitors participating in voluntourism, buying local, etc.).	L = HTA S = County		X	X

**Action H**

Continue to develop and implement “Buy Local” programs to promote purchase of local products and services to keep funds in our communities and minimize carbon footprint.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
H.1	Continue to encourage the visitor industry to prioritize purchase of Hawai'i based, 'āina friendly products, services and technology solutions to include literature, crafts, fashion, music, performance art, film, fresh produce, value-added products, and software.	L = HTA  S = DBEDT, DOA, OVB, GMT, private industry	X	X	X
H.2	Work with hotels, restaurants, and visitor retail to feature or promote local products.	L = HTA  S = DOA, DBEDT, OVB, private industry	X	X	X
H.3	Continue to leverage programs that support buying local. Coordinate with various certification programs for a cohesive promotion program.	L = HTA  S = DOA, DBEDT, GMT	X	X	X
H.4	Promote O'ahu artisans, including local crafts, fashion, music, performing, and visual arts.	L = HTA  S = DBEDT, OVB, GMT	X	X	X

**Action I**

**Manage the visitors' use of cars as transportation on O'ahu.**

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
I.1	Work with the O'ahu Metropolitan Planning Organization to examine the issues stemming from visitor traffic in impacted communities. Determine how to alleviate those issues such as developing infrastructure to reduce stress on residential areas or a penalty structure to discourage visitors or industry from violating restrictions.	L = HTA S = County	X	X	X
I.2	Support O'ahu Metropolitan Planning Organization efforts to provide safe, convenient, reliable and efficient private and public transportation to shift visitors from driving rental cars to more environmentally sustainable modes. Include the development, support of, and advocacy for bike paths and the promotion of bicycle use.	L = HTA S = Community	X	X	X
I.3	Consider creating pedestrian-oriented areas.	L = County S = HTA		X	X
I.4	Look at shuttles from parking areas to sites to alleviate individual cars or parking reservation systems.	L = County, DLNR		X	X

**Action J**

Work with community partners to develop, market, encourage, and support more collaborative, curated experiences that enrich residents and visitors alike.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
J.1	Increase the number of suitable places for visitor and resident activities by renovating popular hikes/sites away from residential areas or developing new sites. Improvements would include adding walking paths, developing parking, signage, etc.	L = HTA S = DLNR, County	X	X	X
J.2	Commit resources to promote alternatives to overused sites or going off the beaten path. Redirect visitors to areas that can accept higher traffic away from residential areas. Enhance these places with signage and messaging, develop programs, educational offerings, increase exhibits, etc.	L = HTA S = GMT, DLNR, County		X	X
J.3	Develop new recreational opportunities for residents to ease the burden on sites that are heavily used by visitors and residents.	L = DLNR, County S = HTA	X	X	X
J.4	Explore the creation of a curated "city pass" program to move visitors to sites and attractions that have capacity and infrastructure to handle more visitors.	L = OVB S = HTA, GMT		X	
J.5	Examine creation of "Kama'āina Days" at identified sites with priority for weekends.	L = HTA S = DLNR, County	X	X	



## VII. Tourism Hotspots

A “hotspot” is an area or site that attracts visitors due to its popularity, which may result in overcrowding, congestion, degradation of resources, safety hazards, and a negative experience for both residents and visitors.

While HTA is not an enforcement agency, it can be a catalyst to bring together respective state and county agencies, the community, and private sector to develop solutions that address hotspot sites and areas.

HTA reviewed the community’s input from the community surveys and meetings, and feedback from the County, OVB and the Steering Committee. Below are the identified hotspot areas and sites that HTA will monitor together with the respective agencies as needed to help mitigate issues. Other areas and sites were identified, but the locations of utmost concern are:

- Ha‘ikū Stairs / a.k.a. Stairway to Heaven – access, safety, community impact
- Hālonā Blowhole and Cove – safety
- Hanauma Bay and Hanauma Bay Nature Preserve – environmental
- Ka‘ena Point – environmental
- Ka‘ōhao, Lanikai Pillbox Trail and neighborhood – access, community impact
- Kailua Beach and Town – access, community impact
- Kaniakapūpū Ruins – culturally sensitive, community impact
- Koko Crater Trail/Koko Head Stairs – capacity, community impact
- Kūkaniloko Birthstones State Historical Site – culturally sensitive
- Laniākea / a.k.a. Turtle Beach – traffic, environmental, safety
- Lē‘ahi (Diamond Head) – capacity, community impact
- Lulumāhu Falls – capacity, environmental, community impact
- Mā‘eli‘eli Trail (Ahuimanu/Kahalu‘u) – capacity, environmental, community impact
- Makapu‘u hike – access, environmental
- Maunawili Falls – capacity, environmental, community impact
- North Shore/Hale‘iwa – traffic
- Waikīkī – capacity



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## Glossary

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

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

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

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

**Per-Person Per-Day Spending:** Total spending of an individual on a given day during their stay.

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

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



## APPENDIX A

# Actions for Future Consideration

The following actions were considered by the O'ahu Steering Committee, but did not make it to the top priority actions.

- **Foster seamless interaction between community and visitors through cultural experiences and knowledge.**
- **Work with Destination Management Companies (DMCs) and Meeting Planners to integrate a respectful and supportive visitor program for Meetings, Conventions and Incentives (MCI).**
- **Expand on programs that strengthen partnerships and encourage mutual support between the visitor industry and community organizations.**
- **Create certification programs to ensure that visitor industry professionals are more knowledgeable and share appropriately with visitors.**
- **Expand programs in hospitality training across all facets of the visitor industry.**
- **Implement communications program to encourage resident participation and better understanding of how regenerative tourism is being implemented.**
- **Deepen investment in partnerships with industry to expand sustainable environmental practices.**

The following actions were considered as important actions by the O'ahu Steering Committee. However, further review by HTA and the County determined these actions to be beyond the current scope of the O'ahu DMAP. These action would be better served by a community lead and would need additional time to identify organization and work towards an agreement; or the action would require significant review and research beyond the three-year scope of this DMAP.

- **Climate proof tourism areas**
- **Deal with homeless issues**
- **Diversify Hawai'i's economy to be less dependent on tourism**

## APPENDIX B

# Sources

**Department of Business, Economic Development and Tourism's County Economic Conditions:**

<https://dbedt.hawaii.gov/economic/qser/county/>

**DestinationNEXT Multi-User Diagnostic Assessment Hawai'i 2019:**

<https://hawaiitourismauthority.org/media/4275/assessment-report-hawaii-statewide.pdf>

**HTA 2019 Visitor Plant Inventory:**

<https://www.hawaiitourismauthority.org/media/4085/2019-visitor-plant-inventory-report-final-rev.pdf>

**HTA Annual Visitor Research Report 2019:**

<https://hawaiitourismauthority.org/media/5062/2019-annual-report-final-for-posting.pdf>

**HTA May 2021 Monthly Visitor Statistics:**

<https://hawaiitourismauthority.org/research/monthly-visitor-statistics/>

**HTA Resident Sentiment Survey:**

<https://www.hawaiitourismauthority.org/research/evaluation-performance-measures/>

**HTA Visitor Satisfaction & Activity Reports:**

<https://hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

