

# HAWAII TOURISM™

AUTHORITY



ISLAND OF  
**HAWAII**  
VISITORS BUREAU™

# Hawai'i Island Community Meeting

Presentation on Hawai'i Island Destination  
Management Action Plan Process and  
Community Input

November 17, 2020



# AGENDA



- 11:00 am Opening & Remarks from John De Fries
- 11:15 am Project Background; State of the Hawai'i Island's Visitor Industry
- 11:30 pm Q&A
- 11:40 pm Process & Input Form Results
- 11:50 am Breakout Session Process
- 11:55 am Breakout Session I
- 12:25 pm Breakout Session II
- 12:55 pm Next Steps:  
Plan Development
- 1:00 pm Close

# ROLES



## Panelists:

Share information,  
Answer questions

## Community Attendees:

Seek to understand  
Ask questions  
Prepare to offer input

## Facilitators:

Manage time & keep  
sessions on track  
Help field questions

## Recorders:

Help capture key  
content in Q&A

# GROUND RULES

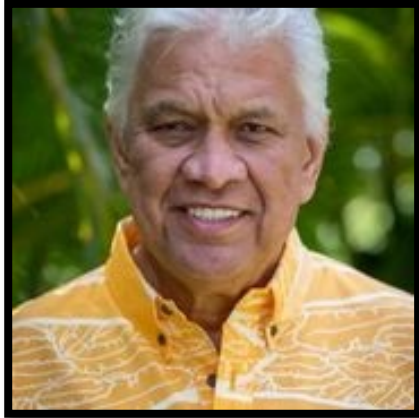
- **Kindly offer grace in the face of time and technological limitations.**
  - Chat for topical questions
- **Be part of a solutions community.**  
Participate with a constructive, solutions-oriented mindset, keep the end goal in mind.

# OUTCOMES

**Participate in Destination Management planning for Hawai'i Island**

- **Share and receive information**
- **Learn about:**
  - **State of tourism on Hawai'i Island**
  - **Planning process**
  - **Results from Community Input Form**
  - **Proposed draft actions**
- **Provide constructive solutions-oriented guidance and feedback on draft actions to consider for Hawai'i Island DMAP**

# Today's Presenters



**John De Fries**  
Hawai'i Tourism Authority  
Kalaoa, Kona, Hawai'i  
Island



**Caroline Anderson**  
Hawai'i Tourism Authority  
Makiki, O'ahu



**Kalani Ka'anā'anā**  
Hawai'i Tourism Authority  
Kailua, O'ahu



**Frecia Cevallos**  
County of Hawai'i  
Hilo, Hawai'i



**Ross Birch**  
Island of Hawai'i Visitors  
Bureau  
Honoka'a, Hawaii



**Keoki Noji**  
Hawai'i Alliance for  
Community Based  
Economic Development  
Kalihi, O'ahu





## *Strategic Plan 2020-2025*

**Natural  
Resources**

**Hawaiian  
Culture**

**Community**

**Brand  
Marketing**

## *Responsible Tourism*



## *Strategic Plan 2020-2025*

***Global Pandemic + Economic Collapse***

**Natural  
Resources**

**Hawaiian  
Culture**

**Community**

**Brand  
Marketing**

***Regenerative Tourism***

# 10,400,000

## VISITOR ARRIVALS 2019



# Global Pandemic Hits

ECONOMIC COLLAPSE  
BEGINS





*mālama*  
KU'U HOME

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A Mindset and a Call to Action





# **Mālama**

**The Organizing  
Principle For  
Our Work**

# **Mālama Mindset**

## **Mālama Hawai‘i**

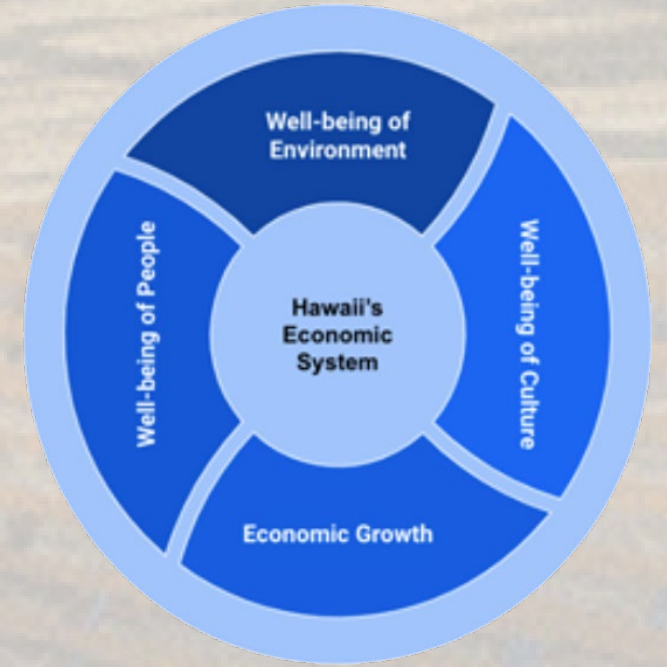
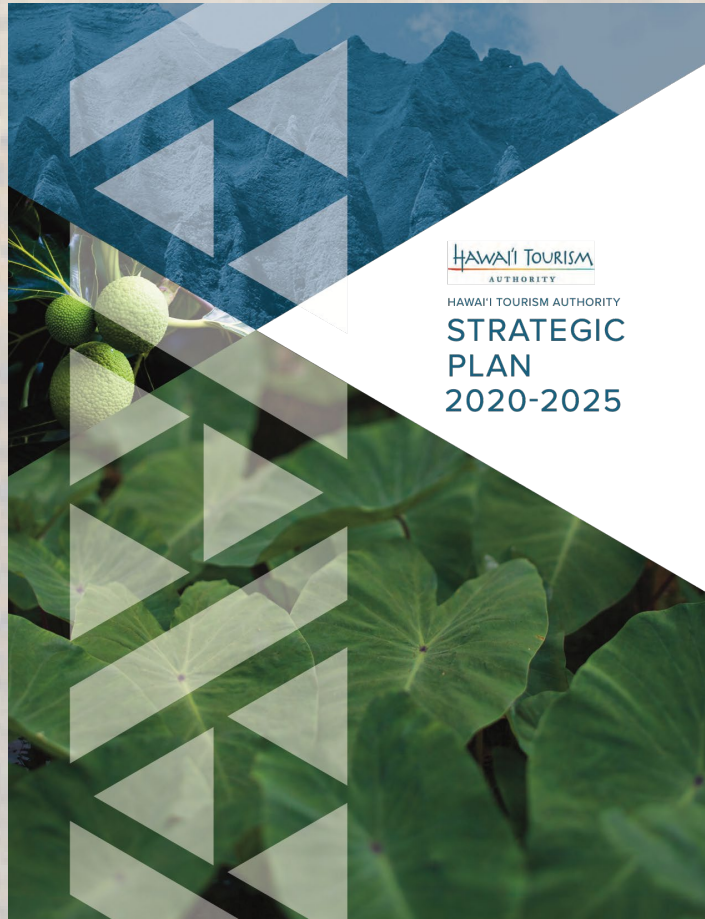
Hawai‘i Visitors & Convention Bureau

## **Mālama Honua**

Polynesian Voyaging Society - Hōkūle‘a

## **Mālama Mandate**

Hawai‘i Green Growth - Aloha+ Challenge



*mālama*  
KU‘U HOME  
Caring for My Beloved Home

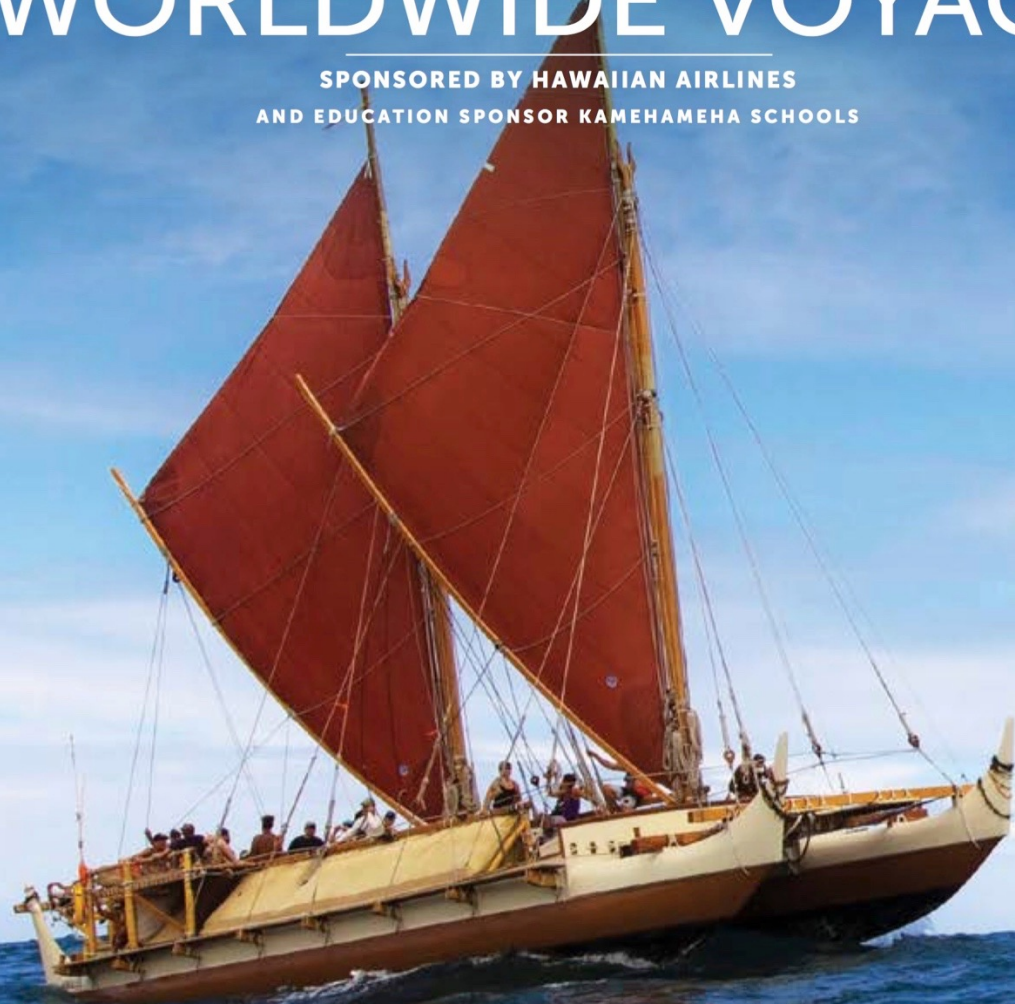




POLYNESIAN VOYAGING SOCIETY

# MĀLAMA HONUA WORLDWIDE VOYAGE

SPONSORED BY HAWAIIAN AIRLINES  
AND EDUCATION SPONSOR KAMEHAMEHA SCHOOLS



## 2014-2017 MĀLAMA HONUA

*Caring for Island Earth*

To navigate toward  
a healthy and  
sustainable future for  
ourselves, our home,  
and our Island Earth  
through voyaging and  
new ways of learning.

# MĀLAMA HONUA

*Caring for Island Earth*

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**150 Ports**

**18 Nations**

**100,000 People**

**8 Marine World  
Heritage Sites**

**One Canoe**

**One Island Earth**



# A Voyage of Recovery & Rediscovery



*mālama*  
KU'U HOME  
Caring for My Beloved Home

# For The Next Seven Generations




*mālama*  
**KU'U HOME**  
Caring for My Beloved Home





# **Welcoming Visitors back to Hawai'i with Aloha for one another**

An imperfect scenario being  
executed by imperfect people  
who have one thing in common:  
Aloha for one another.





**Visitors to Hawai'i Island**

2019

HAWAI'I ISLAND

1,763,904

TOTAL VISITORS

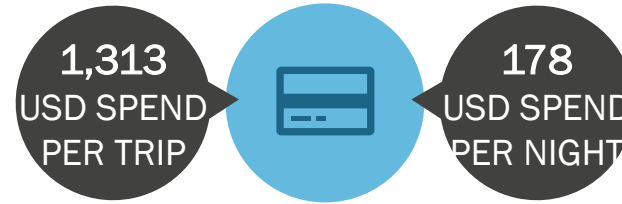
USD 2.316 B

TOTAL SPEND

AVERAGE LENGTH OF STAY



SPEND



TOTAL VISITORS DAYS (%) BY SOURCE MARKET



- U.S. West
- U.S. East
- Other
- Latin America
- Europe
- Oceania
- Canada
- Other Asia
- Japan

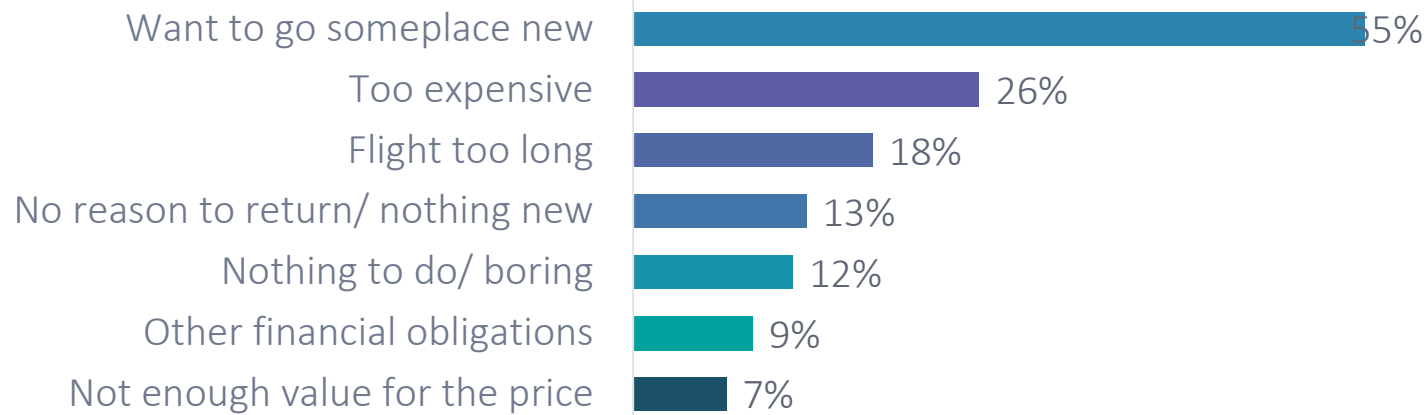
PURPOSE OF VISIT (% of visitors)



- Pleasure/Vacation
- Visit Friends/Rel.
- Other
- Honeymoon/Get Married
- MCI

# 2019 Hawai'i Island Visitors Satisfaction

## REASONS FOR NOT REVISITING – US s



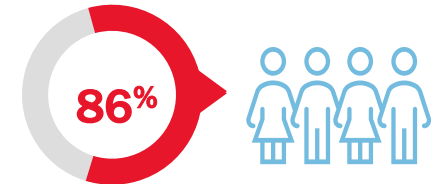
## NEED MORE IMPROVEMENT – US Visitors



## OVERALL SATISFACTION



## LIKELY TO RECOMMEND

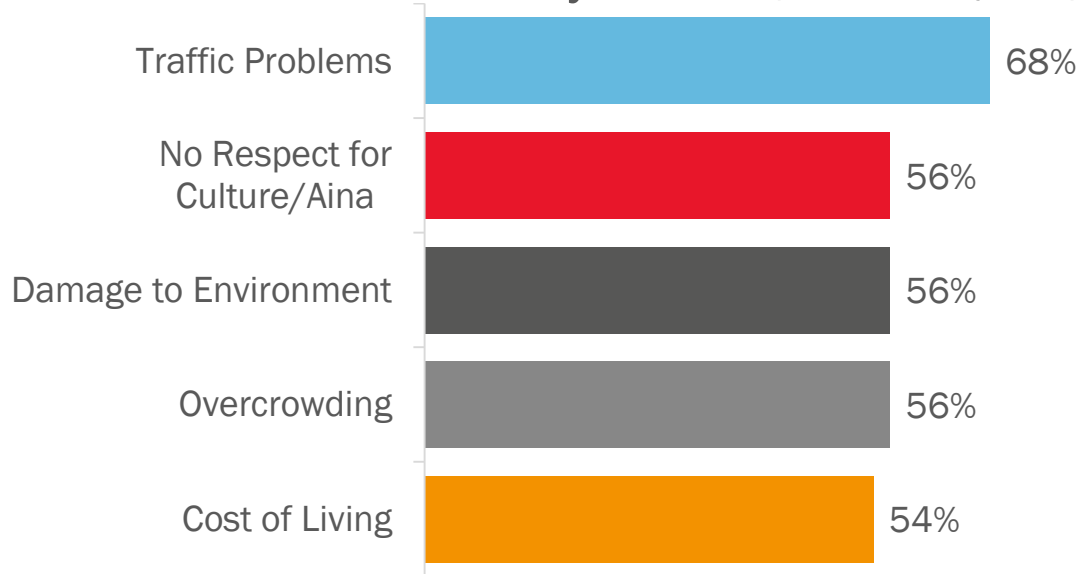


## LIKELY TO VISIT HAWAI'I ISLAND IN THE NEXT 5 YEARS



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

## Problems Created by Tourism (Hawai'i County 2019)



## Resident Sentiment (Hawai'i County 2019)

Tourism has brought more benefits than problems



Positive Impact of Tourism on You & Your Family



Island being run for tourist



\*Multiple responses, therefore, totals do not add up to 100%.  
Source: HTA

## 405,481

TOTAL VISITORS

## -69.4%

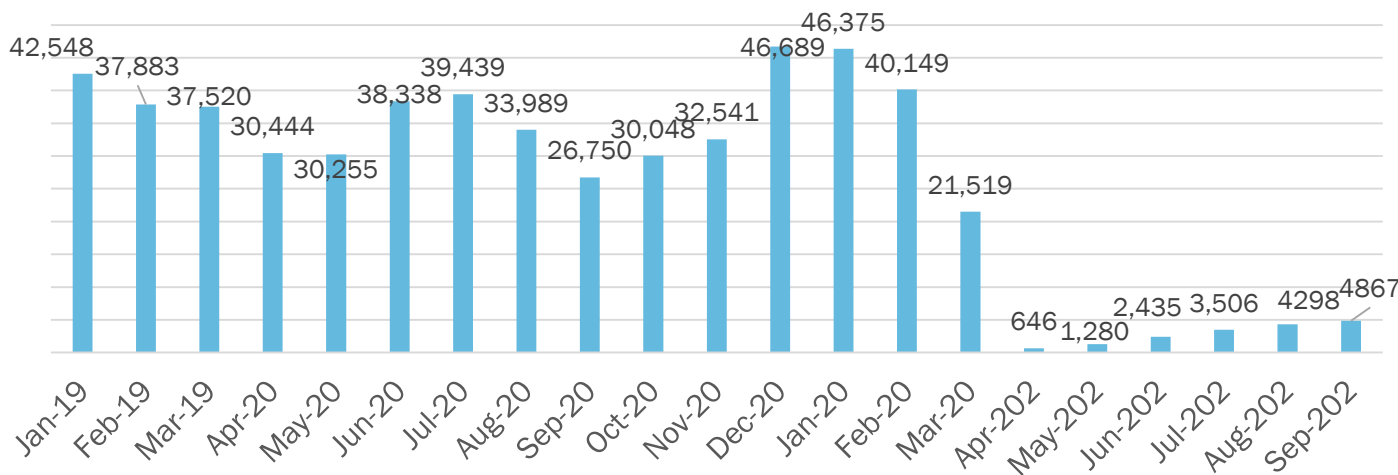
YEAR-OVER-YEAR

### AVERAGE LENGTH OF STAY

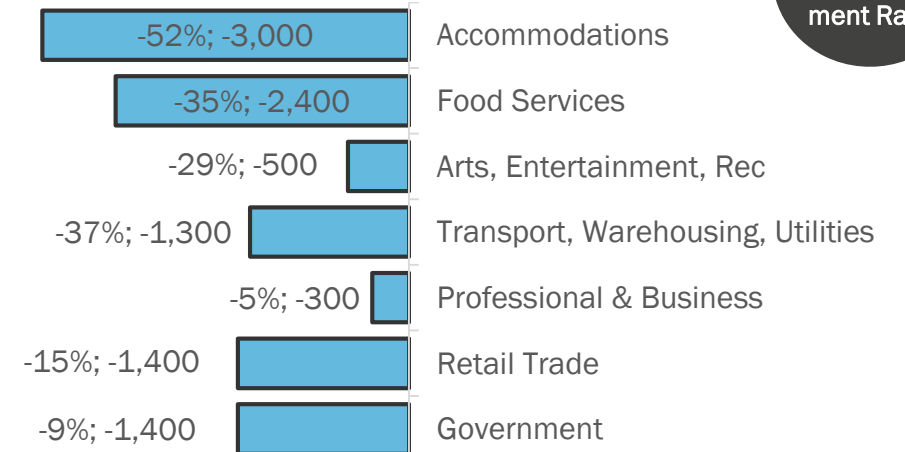


9.34  
NIGHTS

### AVERAGE DAILY CENSUS



### Job Loss (Hawai'i County 2<sup>nd</sup> Qtr 2020)



-20%  
Unemployment Rate



# What is Destination Management?

- Defined as “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.”

Source: HTA Strategic Plan 2020-2025



# Why Are We Doing A Destination Management Action Plan?

- Reset, Rebuild, Redefine the Visitor Industry for Your Island
  1. Recovery
  2. Rebuild to the Desired Visitor Industry
- Collaboration with our counties, communities, visitor industry, and other state/county agencies to define and set the direction for tourism.
- Improve current or develop new tourism products and offerings
- Establish better systems for destination management





# Identify Appropriate Balance

The economic benefits of tourism and impact on local services, natural and cultural resources, and residents' quality of life.



# Questions & Answers



# The Process

# Hawai Island DMAP Steering Committee

**Ross Birch**

*Executive Director*

Island of Hawaii Visitors Bureau

**Micah Alameda**

*HTA Board Member*

Na Leo TV

**Kuuiipo Kumukahi**

*HTA Board Member*

Hyatt Regency Waikiki

**Craig Anderson**

*Island of Hawaii Chapter Chairperson*

Hawaii Lodging and Tourism Association

**Cheryl Kauhane Lupenui**

*President and CEO*

The Kohala Center

**Tane Datta**

*Owner*

Adaptations Inc.

**Linda Nako**

*President*

Hawaii Island Visitors Bureau/Hilo Hawaiian

**Kaiu Kimura**

*Executive Director*

Imiloa Astronomy Center

**Kuhao Zane**

*Designer, Entrepreneur*

Sig Zane Designs

**Jesse Potter**

*President*

Pohaha I ka Lani

**Jessica Ferracane**

*Public Affairs Specialist*

Hawaii Volcanoes National Park

**Miles Yoshioka**

*Executive Officert*

Hawaii Island Chamber of Commerce

**Charles Young**

*Hookena Representative*

Aha Moku Advisory Committee

**Margo Mau Bunnell**

*General Manager*

Roberts Hawai'i

**Pomai Weigert**

*AgBusiness Consultant*

GoFarm Hawaii

**Kaiulani Blankenfeld**

*Director of Hawaiian Culture*

Fairmont Orchid

**Rachel Solemsaas**

*Chancellor*

Hawaii Community College

**Ulu Ching**

*Senior Program Manager*

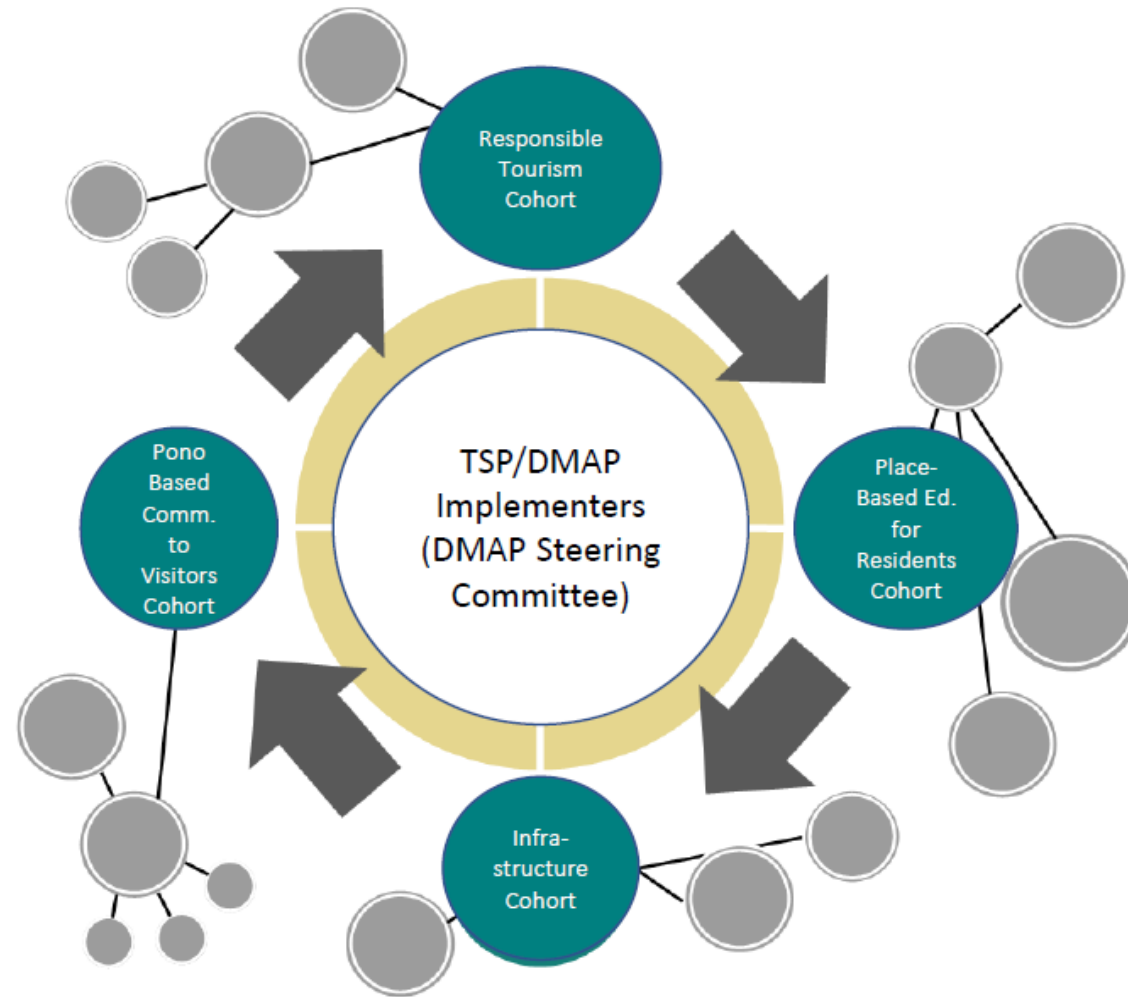
Conservation International

**Windy Laros**

*Executive Director*

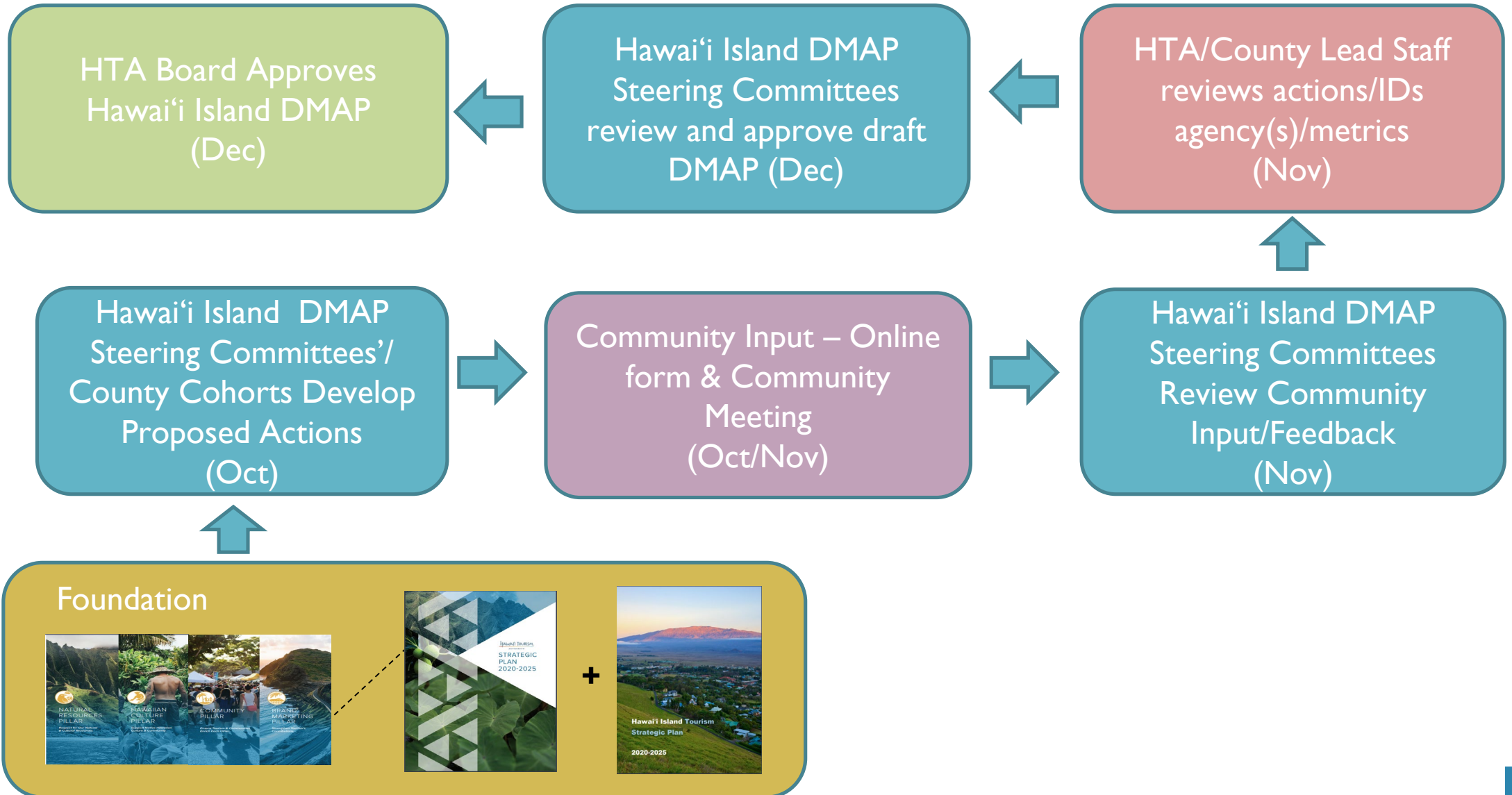
Kona Kohala Chamber of Commerce

# Hawai Island's Tourism Strategic Plan Cohorts



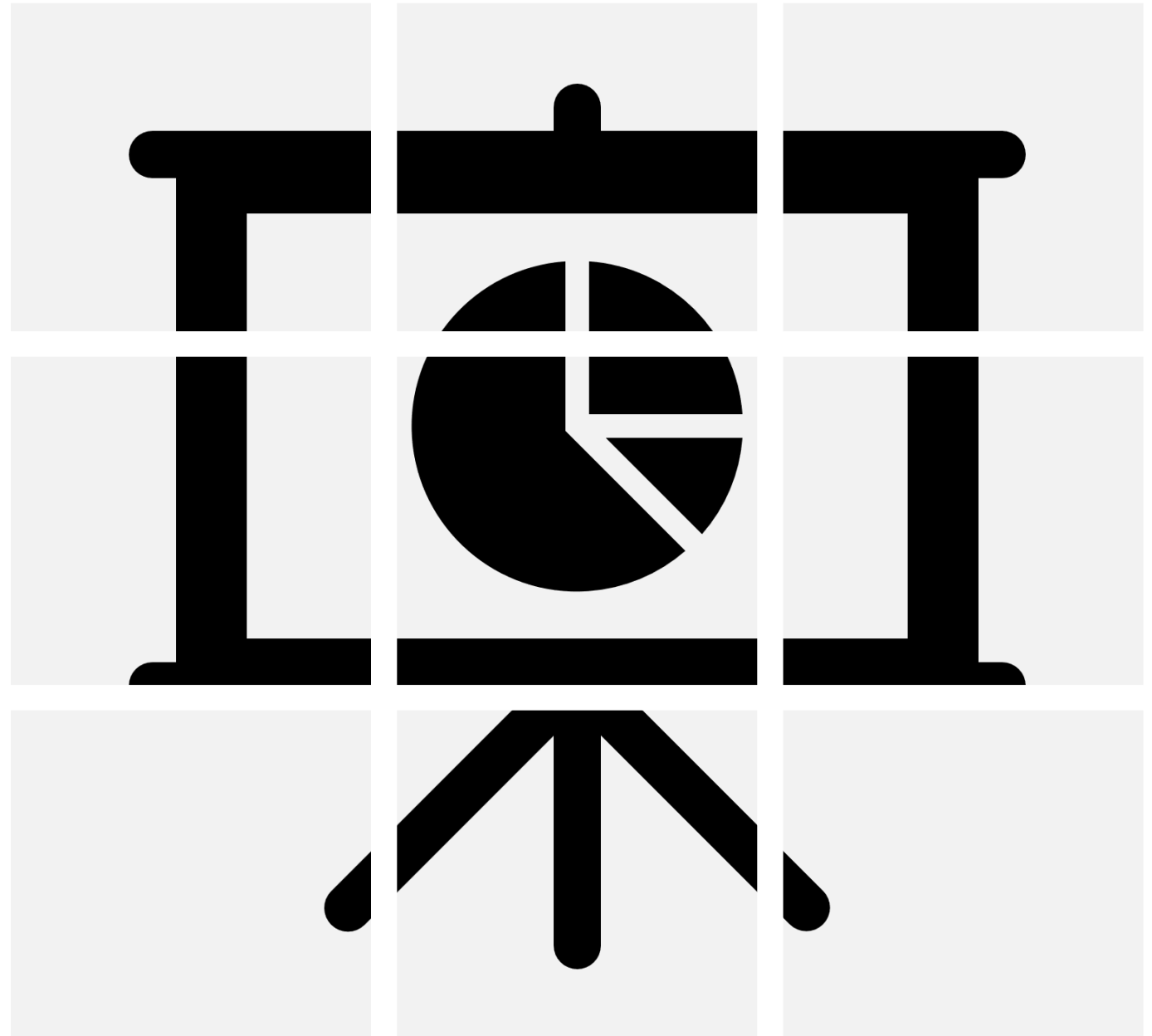
TSP/DMAP Implementers are both the HTA DMAP Steering Committee and HI-CRSP cohort participants. After cohorts convene, they branch out to their community networks to help implement the action plans. The work from these island-wide cohorts will also feed the implementation of the CDPs, Recovery Plans and other county plans.

# The Process





# Results from Community Online Input Form

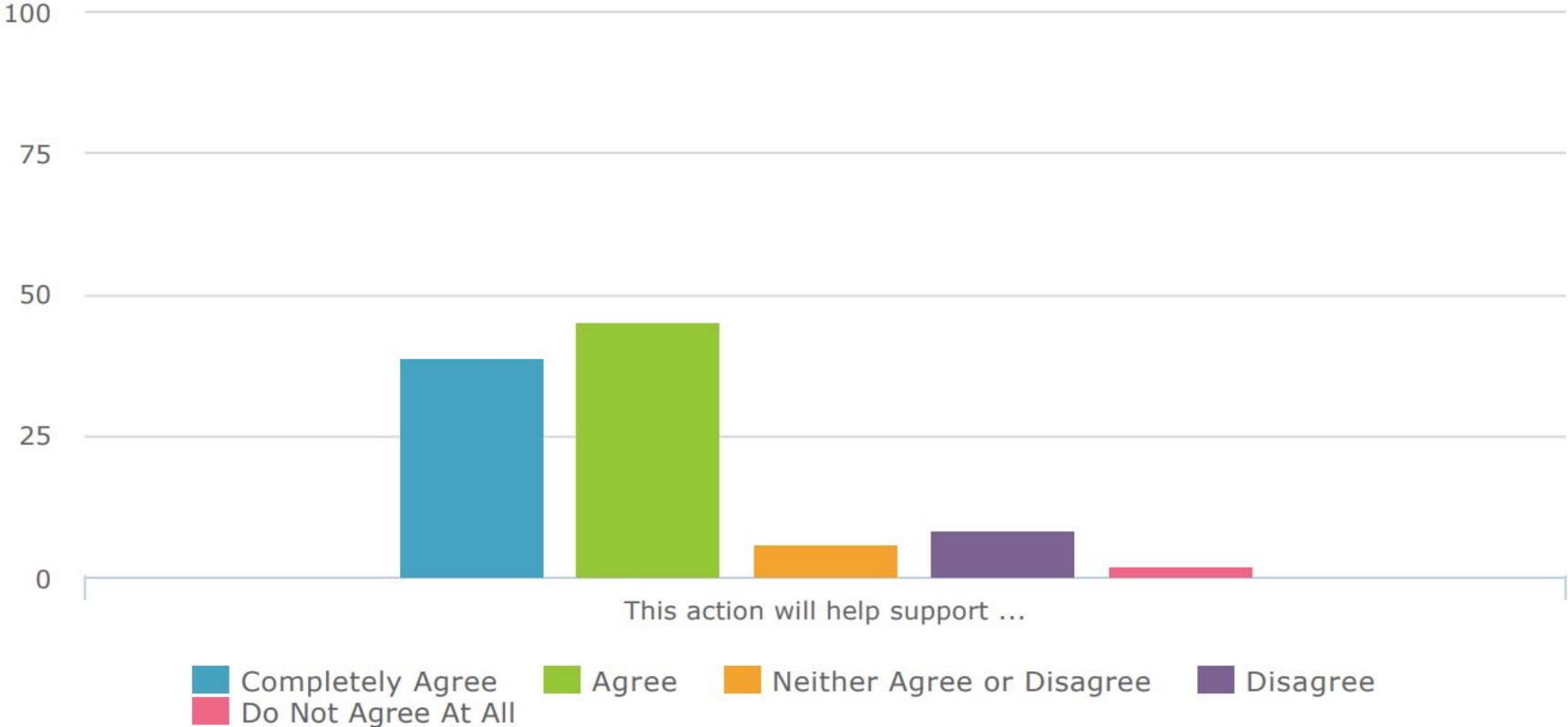


# Respect for Natural & Cultural Resources (Natural Resources)

4. Action: Create a model of pono practice/responsible tourism demonstrating balance between human use and ecosystem health/preservation of biodiversity.

How much do you agree or disagree with the statement below:

This action will help support a mutually satisfying resident and visitor experience and preserve or boost economic benefits.



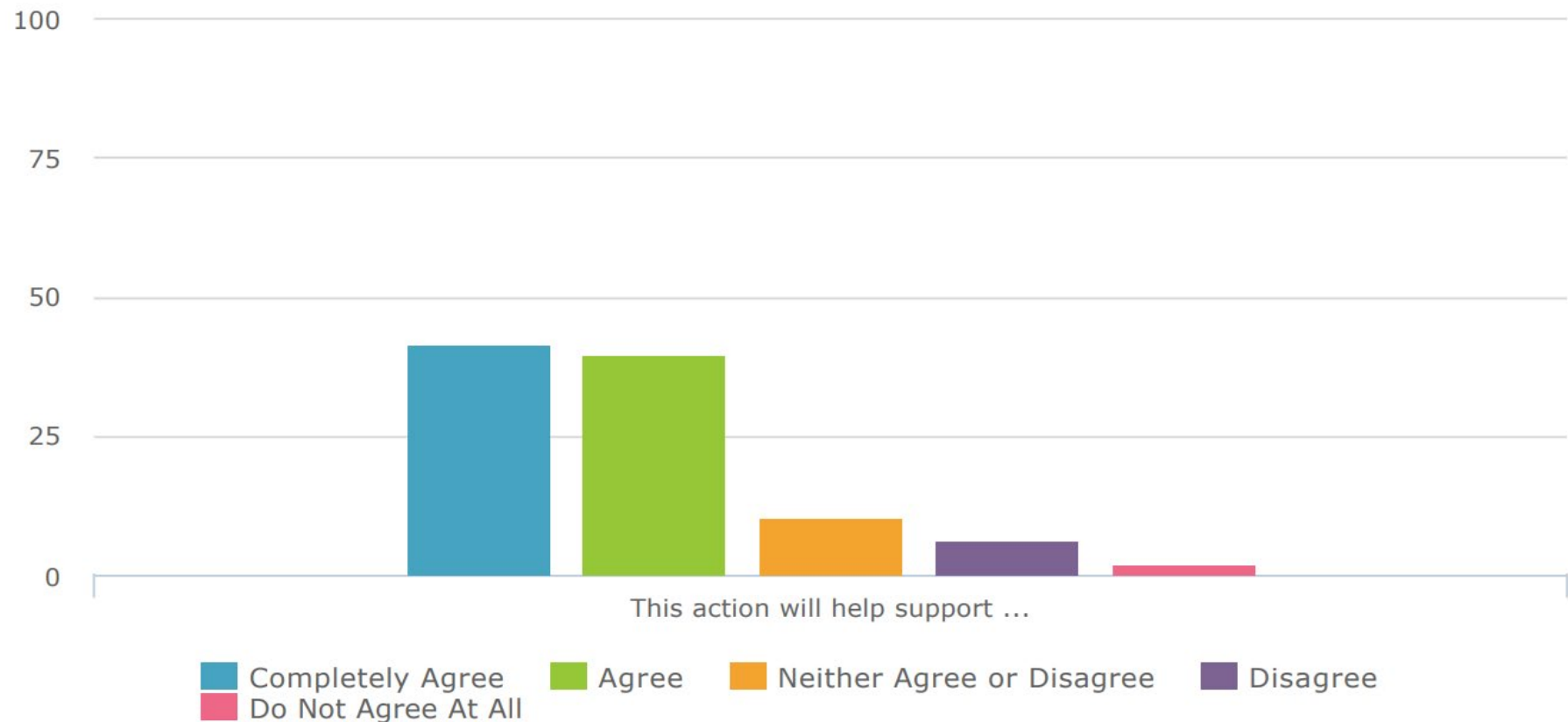


# Support Native Hawaiian Culture & Community (Hawaiian Culture)

5. Action: Ensure communities retain their sense of place, including recognizing Native Hawaiian knowledge, culture and people first and then the multi-cultural diversity of each community.

How much do you agree or disagree with the statement below:

This action will help support a mutually satisfying resident and visitor experience and preserve or boost economic benefits.

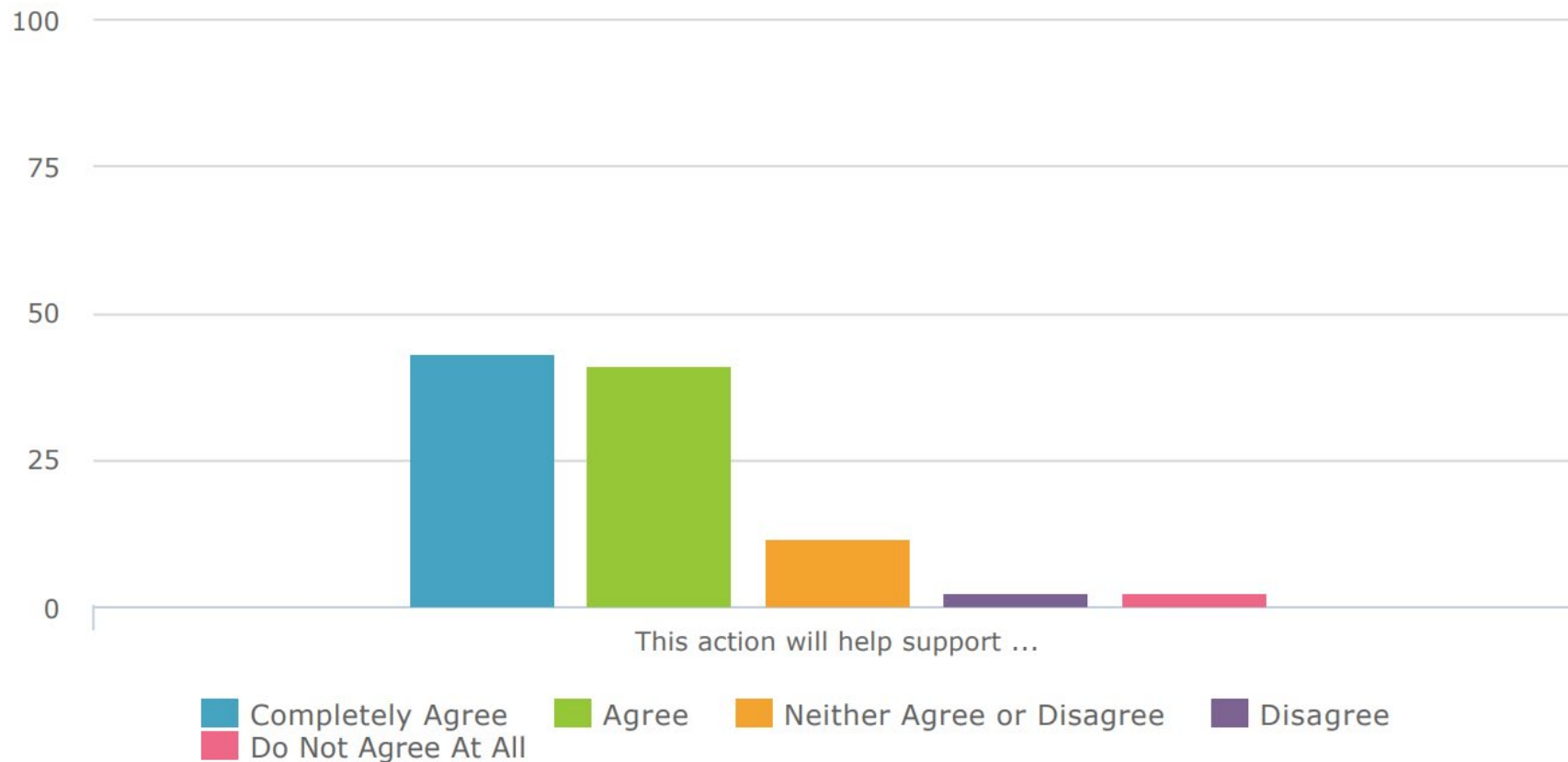


# Ensure Tourism & Communities Enrich Each Other (Community)

6. Action: Coordinate with the visitor industry and other stakeholders to provide employment that sustains families on Hawaii Island, proactively reinvests back into the local community and commits to uplifting Native Hawaiian culture, values, and customs.

How much do you agree or disagree with the statement below:

This action will help support a mutually satisfying resident and visitor experience and preserve or boost economic benefits.

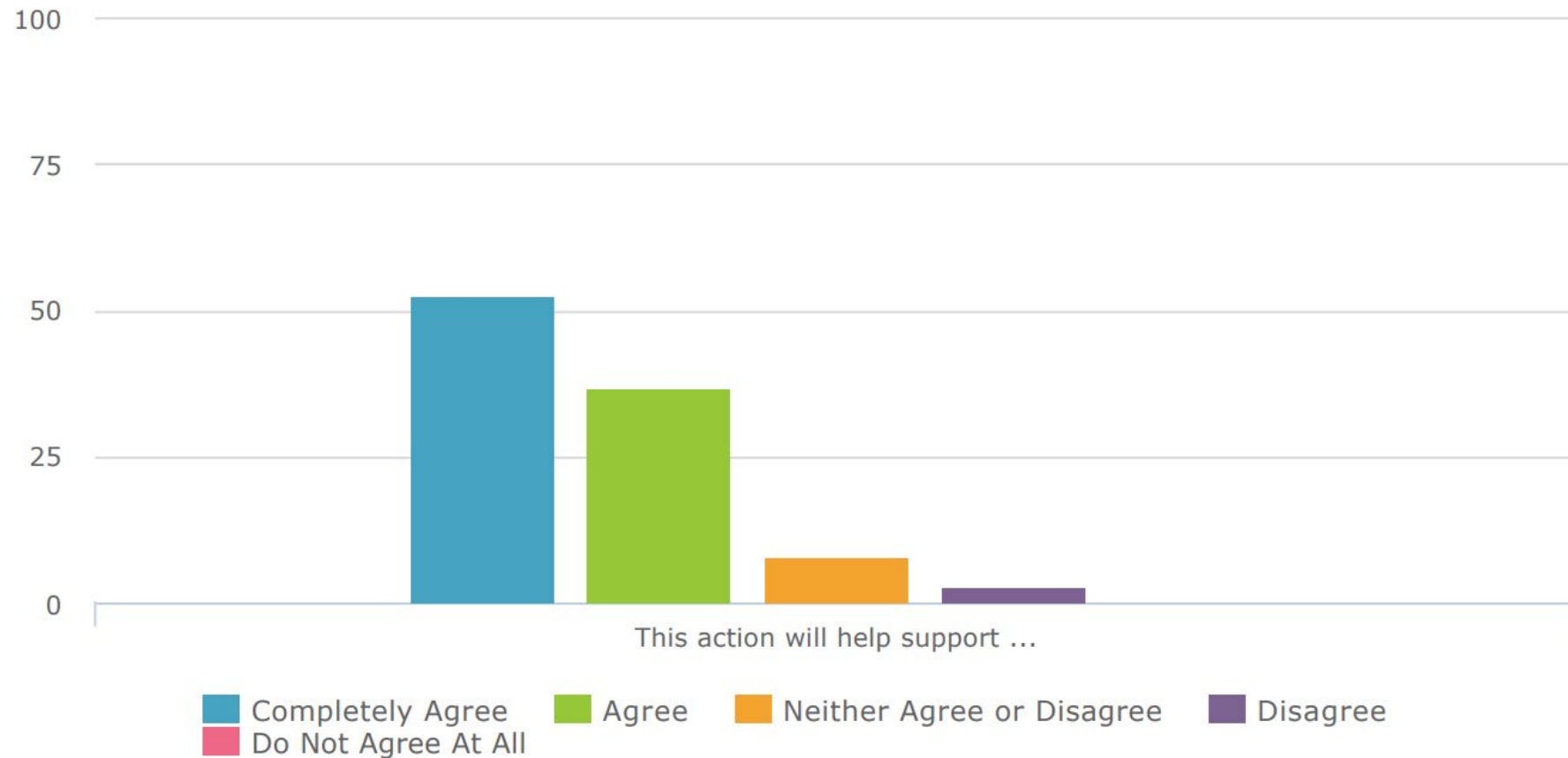


# Strengthen Tourism Contribution (Brand Marketing)

8. Action: Develop ways for visitors to authentically engage and contribute back to Hawaii Island and be accountable for their actions.

How much do you agree or disagree with the statement below:

This action will help support a mutually satisfying resident and visitor experience and preserve or boost economic benefits.



A lush tropical landscape featuring a waterfall cascading into a dark pool, surrounded by dense green forest. The scene is captured from an elevated perspective, showing the waterfall's path down a rocky ledge into a calm pool. The surrounding forest is thick with various types of trees, including palm trees and broad-leafed plants. In the background, rolling hills and distant mountains are visible under a bright sky with scattered clouds. The overall atmosphere is serene and natural.

# Breakout Sessions

# Today's Facilitators & Recorders

## Natural & Cultural Resources

- Facilitator: Keiko Mercado, County
- Recorder: Bob Agres, County
- HTA: Dede Howa

## Hawaiian Culture & Community

- Facilitator: Frecia Cevallos, County
- Recorder: Michelle Agbigay, County
- HTA: Maka Casson-Fisher

## Tourism & Communities Enrich Each Other

- Facilitator: Keoki Noji, HACBED
- Recorder: Pua Yang, HACBED
- HTA: Caroline Anderson and Marisa Yamane

## Strengthen Tourism Contribution

- Facilitator: Brent Kakesako, HACBED
- Recorder: Sean Tangco, HACBED
- HTA: Pattie Herman



# Breakout Session I



**Welcome Back**



# Breakout Session II





**Welcome Back**

## Community:

- Submit responses to online surveys by November 20
- Submit meeting evaluation by November 24
- Go to [HawaiiTourismAuthority.org](http://HawaiiTourismAuthority.org) for
  - Answers to today's questions

## Steering Committee:

- Will meet on December 4 to review and finalize proposed draft actions.





*'A'ōhe hana nui ke alu 'ia.*  
No task is too big when done together by all.



# Mahalo

[www.hawaiitourismauthority.org](http://www.hawaiitourismauthority.org)

HAWAII TOURISM  
AUTHORITY