



**HĀLĀWAI KŪMAU O KE KŌMIKE HO'OKAHUA HAWAI'I
KE'ENA KULEANA HO'OKIPA O HAWAI'I**

**HO'OKAHUA HAWAI'I STANDING COMMITTEE MEETING
HAWAI'I TOURISM AUTHORITY**

**HĀLĀWAI KELEKA'A'IKE
VIRTUAL MEETING**

Pō'akahī, 20 Mei 2024, 8:30 a.m.
Monday, May 20, 2024 at 8:30 a.m.

E ho'olele 'īwā 'ia ka hālāwai ma o ka Zoom. Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/87535612621>

E noi 'ia paha 'oe e kāinoa me kou inoa a leka uila paha. E 'olu'olu, e ho'okomo i kou inoa piha akā hiki nō iā 'oe ke ho'ohana i ka inoa kapakapa e like me kou makemake.
You may be asked to enter your name or email. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous.

Kelepona / Call In: 1 719 359 4580
Helu Hālāwai / Webinar ID: 875 3561 2621

Hiki i ka lehulehu ke hō'ike mana'o ma o ka palapala a i 'ole ma o ka waha. E kau palena 'ia ka hō'ike mana'o waha (ma ke kino a i 'ole ma o ka Zoom) he 'elima minuke ka lō'ihī no kēlā me kēia kumuhana. E kāinoa no ka hō'ike mana'o waha ma ke pākaukau ho'okipa ma ka lumi hālāwai. E kāinoa no ka hō'ike mana'o waha ma o ka Zoom ma o ke pihi "Q&A."

Members of the public may provide written or oral testimony on agenda items. Oral testimony (in-person or via Zoom) will be limited to five minutes for each testifier per agenda item. Signup for oral testimony via Zoom will be accepted through the Q&A feature on Zoom.

E ho'ohui 'ia nā palapala hō'ike mana'o i hiki ma ka pū'olo hālāwai. E leka uila 'ia nā palapala iā Carole Hagihara-Loo ma carole@gohta.net, a i 'ole, e lawe kino 'ia i ke ke'ena. No nā palapala hō'ike mana'o i hō'ea mai ma hope o ka pa'a o ka pū'olo hālāwai ('elua lā ma mua o ka hālāwai), e kāka'ahi 'ia nā kope i ke kōmike a e mākaukau no ka 'ike 'ia e ke anaina ma ka hālāwai.

Written testimony received ahead of the preparation of the committee packet will be included in the packet. Email written testimony to Carole Hagihara-Loo at Carole@gohta.net or hand-deliver or send via postal mail to the Hawai'i Tourism Authority office, 1801 Kalākaua Avenue, 1st Floor, Honolulu, Hawai'i 96815. Written testimony received after the issuance of the board packet (two business days ahead of the meeting) will be distributed to the committee and available for public inspection at the meeting.

AGENDA

1. *Ho'omaka a Wehena*
Call to Order and Opening Protocol
2. *Kikolā*
Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic.
3. *'Āpono Mo'olelo Hālāwai*
Approval of Minutes of the November 21, 2023 Ho'okahua Hawai'i Standing Committee Meeting
4. *Hō'ike'ike, Kūkā, a Ho'oholo no ka Ho'omāhele Hou 'Ana O Ka Mo'ohelu Kālā FY24*
Presentation, Discussion and/or Action on Fiscal Year 2024 Budget Reallocations
5. *Hō'ike'ike no kā HTA Papa Ho'olālā Ho'omōhala Limahana*
Presentation & Discussion on HTA's Workforce Development Plan
6. *Hō'ike'ike no ka Papahana 'o ClimbHI LEI*
Presentation & Discussion on ClimbHI LEI Program
7. *Nū Hou no ka 'Aelike Kilohana*
Kilohana Contract Updates
 - a. *Hō'ike'ike a Kūkā no ka Papahana Palapala Ho'ohiki*
Presentation & Discussion on Quality Assurance Program Presentation
 - b. *Hō'ike'ike a Kūkā no ka Palapala Hō'ike o Ke Ana Pono o ka 'Oihana*
Presentation & Discussion on Technical Needs Assessment Report
 - c. *Hō'ike'ike, Kūkā, a Ho'oholo no ka Ho'oholo Mua 'Ana o nā Pāhana Kumu Waiwai Kaiāulu*
Presentation, Discussion and/or Action on Foundational Technical Assistance & Community Tourism Collaboratives Planning
8. *Hō'ike'ike, Kūkā, a Ho'oholo no ke Ka'akālai Mālama 'Āina Ho'okipa no ka FY25, FY26-27*
Presentation, Discussion and/or Action on Destination Stewardship Strategies for Fiscal Year 2025, Fiscal Years 2026-2027.
9. *Ho'oku'u*
Adjournment

***** 'Aha Ho'okō:** *Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai i ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

***** Executive Session:** The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ekolu lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai, e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā. Ua noa pū kēia ho'olaha ma nā kino 'oko'a e like me ka mea pono.

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or carole@gohta.net as soon as possible, preferably no later than 4 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in alternative/**accessible** formats.

E like nō me ka 'ōlelo o ke Kānāwai Hawai'i i ho'oholo 'ia māhele 92-32.7, e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi e hiki ai ka po'e o ka lehulehu ke noho a komo pū ma nā hālāwai ma o ka ho'ohana 'ana i ka 'enehana pāpaho (ICT). Aia ana kēia 'enehana pāpaho ma ka papahale mua o ka lumi ho'okipa i mua o ke Ke'ena Kuleana Ho'okipa o Hawai'i ma ka Hale 'Aha. 'O 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815 ka helu wahi.

In accordance with HRS section 92-3.7, the Hawai'i Tourism Authority will establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawaii Tourism Authority at the Hawai'i Convention Center at 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815.

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Approval of the Minutes of the
November 21, 2023 Ho'okahua Hawai'i Standing
Committee Meeting



Ke'ena Kuleana Ho'opipa O Hawai'i
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**HO'OKAHUA HAWAI'I STANDING COMMITTEE MEETING
HAWAI'I TOURISM AUTHORITY
Tuesday, November 21, 2023, at 9:00 a.m.
VIRTUAL MEETING**

MINUTES OF HO'OKAHUA HAWAI'I STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Mahina Paishon-Duarte (Chair), Dylan Ching (Vice-Chair), Kimberly Agas, Mufi Hannemann
MEMBER NOT PRESENT:	Sherry Menor-McNamara, Sig Zane
HTA STAFF PRESENT:	Daniel Nāho'opi'i, Kalani Ka'anā'anā, Caroline Anderson, Maka Casson-Fisher, Carole Hagihara, Iwalani Kūali'i, Kaho'ohanohano
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Chair Duarte called the meeting to order at 9:08 a.m. Mr. Casson-Fisher used the analogy of moon phases to reassess the projects and be prepared for the rainy seasons.

2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic

Mr. Casson-Fisher did the roll call. All were confirmed in attendance, and that they were alone. Ms. Menor-McNamara and Mr. Zane were excused.

3. Approval of Minutes of the October 6, 2023 Ho'okahua Hawai'i Standing Committee Meeting

Mr. Ching made a motion to approve the minutes. Ms. Agas seconded. Mr. Casson-Fisher did the roll call, and the motion was approved unanimously.

4. Presentation, Discussion and/or Action on Select FY24 Program, Contract, and Budget Reallocations Related to Funding Incremental Marketing Programs in CY24

Chair Paishon-Duarte asked Mr. Ka'anā'anā to begin the presentation. He explained that the items that were highlighted were those falling within the purview of the Ho'okahua Standing Committee. Incremental funding, which had already been discussed at the Branding Standing Committee and the Budget and Finance Committee, was displayed at the top of the spreadsheet. This meeting aimed to designate savings and cuts to cover the current funding deficit of \$13.45 million.

Program savings that had been identified referred either to unspent funds or funds that had already been budgeted but in which there was some leeway. Mr. Ka'anā'anā explained that program savings were different from program cuts. Possible cuts had been identified by the HTA staff, reflecting items already discussed by the Branding Standing Committee and the Budget and Finance Committee. Despite the work done so far, it had not been possible to remove the remaining deficit of \$394,000, but the aim was for the deficit to be zero.

Mr. Ka'anā'anā outlined five budget items in which cuts were envisioned. The first was DMAP implementation programs valued at \$1.5 million, which were to be postponed. Ms. Anderson explained that these were funds to support the next iteration of DMAP, which were to be approved in the May Board meeting. The programs would be implemented starting in July. Mr. Ka'anā'anā added that the appropriation for the Fiscal Year 2025 was not likely to enter the HTA accounts before September, so it was possible that the timing of implementation might move into FY25.

The budget item for 'Ōlelo Hawai'i was to be reduced from its original amount of \$500,000 to \$125,000. This program supported digitization and had already been funded up to March. The cut concerned the next phase, which was to begin the following April. The staff had proposed cutting the Hawaiian Culture Initiative, which is valued at \$420,000. This contract was likely awarded to NaHHA, although procurement had not yet occurred. Cutting this item would mean that services would be eliminated in the current fiscal year but could be restarted in the next fiscal year.

Market Support for Sales Missions in Calendar Year 2024, valued at \$30,000, was to be cut. This referred to funds for cultural practitioners who accompanied global brand marketing teams to carry out activities to enhance their exhibits during trade shows or blitzes. Essentially, this was a team promoting Hawaiian Culture. The Ma'ema'e Toolkit, valued at \$25,000, was a one-time update to this toolkit, which

was a resource enabling partner to accurately portray Hawaiian Culture. This would cut the Calendar Year 2024 update to the toolkit.

Chair Paishon-Duarte expressed her hope that the important work being carried out with communities would not be stalled due to cuts in the DMAP budget. Ms. Anderson explained there had been a delay in issuing the RFP to implement the next phase of DMAP. This had now been drafted and was being reviewed by the HTA contract team. The current phase of DMAP was being implemented by the Visitors' Bureau, which still had funds for this.

Mr. Ka'anā'anā expressed disquiet about expenditure being pushed into the next fiscal year since assuming that the next fiscal year would have a larger allocation was risky. This method would make future budget management more difficult. However, Ms. Anderson explained that funds had already been allocated for FY2025. The \$1.5 million for DMAP under discussion was 2024 funding, which had not yet been implemented because the RFP had not yet been issued. Chair Paishon-Duarte commented that this was not a sound business philosophy.

Mr. Ching pointed out that reducing items that had already been budgeted for was always an alarming process, but he understood that circumstances made it necessary at this time. He supported the proposal by Ms. Anderson and Mr. Ka'anā'anā. He was unhappy about the cut in support of NaHHA since this was the core funding that had always been given to this organization. Mr. Ka'anā'anā explained that the last NaHHA contract ended in June 2023, and there was no other procurement after that. The winner of the RFP would become eligible to receive FY2025 funds in July 2024. If this item were not cut, the RFP could be issued immediately, and the contract would begin at once.

Mr. Hanneman had been alarmed at the proposed cuts in DMAP implementation because this was vital to community support for tourism rebranding. He understood from Ms. Anderson's comments that community involvement would not be compromised. He was concerned about the proposed elimination of NaHHA services because this organization had been a reliable partner for the HTA. However, the recommendations by staff and the Board emphasized the priority of these cuts.

Mr. Agas was also concerned about the cuts to DMAP but was grateful for the reassurances from the team and Ms. Anderson. She hoped this process would not have to be repeated next year. She reiterated that NaHHA was a critical partner for the HTA. Chair Paishon-Duarte thanked each of the members for expressing their opinions. She was also concerned about deferring the next phase of DMAP and hoped not only that

this process would not be necessary in the following year, but also that the budget allocation of DMAP would be increased in subsequent years. Secondly, she did not support eliminating the NaHHA budget item but would accept reducing it by up to 50%. This was because of the importance of Hawaiian Culture in the HTA Strategic Plan. She had the impression that only a small proportion of the total budget and resources of the HTA was allocated to contractors who were focused on preserving Hawaiian Culture. Mr. Ka'anā'anā suggested examining the effect of halving the budget allocation to the NaHHA contract. He also noted that staff noted that the deficit could be offset by considering cash flow. In that case, cuts could be reduced, although using cash flow would mean sending expenditures ahead to FY25. Mr. Choy suggested that incremental requests should be reconsidered to preserve some items even though the Board had approved them.

Chair Paishon-Duarte asked for recommendations, and it was mentioned that the Budget and Finance Committee had also suggested adjusting the budget on a cash flow basis, implying that the budget for FY25 would be modified. Other options to avoid cuts or reductions would be to reduce the budget for the Japan or U.S. marketing programs, given that the first phase of the U.S. marketing program had already been expended. If the contract for NaHHA were not cut, the deficit would be \$814,365, which could be cleared if the full Board approves using cash flow to cover incremental amounts.

Mr. Ching favored not cutting NaHHA but felt it would be preferable not to reconsider cutting increments, which had already been discussed. However, he suggested that reducing the Japan recovery marketing program might be possible. Mr. Hannemann pointed out that the Branding Standing Committee had already decided that it would be better not to make any changes to the incremental budgets for Japan or the U.S. because Japan was an important market. The U.S. is the market that is supporting Hawai'i tourism at present. He felt cutting the Canada marketing program was preferable, leaving the U.S. and Japan untouched. He concurred with Chair Paishon-Duarte's hope that cutting the NaHHA contract could be avoided.

Ms. Agas stated that as a hotelier, she agreed with Mr. Hannemann and supported the Chair. She hoped that at least 50% of the NaHHA contract could be protected. She agreed that the increments for the U.S. market should be untouched, but she was unsure about the time necessary for the Japanese market to return to normal and felt that the yen exchange rate had a vital role to play.

Based on the preceding discussion, Chair Paishon-Duarte suggested that the NaHHA contract be reduced by \$120,000 to \$300,000. Mr. Ka'anā'anā reminded the committee

that it was important to remember that this was a contract for a contractor to provide services for Hawaiian Culture initiatives. It had to pass through an official procurement process that would affect timing.

The Vice-Chair proposed a motion to accept all the recommendations for budget cuts as presented by the staff except the Hawaiian Culture Initiative Contract, which would be reduced from \$420,000 to \$300,000, a saving of \$120,000. Mr. Hannemann seconded the motion, and it was carried unanimously.

5. Presentation, Discussion and/or Action on Weekly Ho'okahua Hawai'i Standing Committee Meetings

Chair Paishon-Duarte stated that she and Mr. Ka'anā'anā had recently participated in a tourism panel at the CNHA convention on Maui, at which she presented the HTA's intention to seek out the best ideas to shift state-wide tourism towards a regenerative model. To achieve this, input was needed from retailers, hotels, airlines, attractions, and agricultural businesses. The HTA had aligned itself with communities whose aim was regenerative tourism and was searching for strategies and models to move the tourism dial in this direction.

Chair Paishon-Duarte felt that the Ho'okahua committee could function as a channel through which community members could put forward their best ideas to the HTA. Further, Mr. Ching and Mr. Ka'anā'anā were interested in getting information about models that were already working, whether hotels, restaurants, or airlines. Some of these organizations were making incremental progress and should be supported and emulated.

This was why Chair Paishon-Duarte and the Vice-Chair proposed that this committee conduct weekly meetings of no more than 45 minutes, if possible, to utilize the HTA channels to receive the best ideas from the community. Committee meetings would seek the answers to two questions:

1. Which models were already working, and what could be learned from each of them?
2. What innovative ideas were available to further the regenerative tourism model?

Mr. Hannemann supported this idea and believed that it was in keeping with the tourism industry's aim to seek the opinions of community members so that they would feel part of the process. The tourism industry benefited when ideas came from community members and when communities did not assume that all innovations should originate from major stakeholders. This was also in keeping with the DMAP process. Even though

there would be issues on which there was disagreement, it was important for the tourism industry to be seen as speaking with a single voice. This would enable the HTA to live up to the title “Authority.” The HTA needed to be armed with the best information and input from all sectors of the community to represent our community and the hospitality industry effectively in general. Instituting weekly meetings would mean that every member had to commit to being present every week. Chair Paishon-Duarte agreed with Mr. Hannemann’s comment that community feedback was in keeping with the DMAP process.

Ms. Agas appreciated using as many resources as possible to obtain the best input. Continuing to open up would encourage greater community involvement. She was concerned that scheduling weekly meetings might make establishing a quorum problematic, although if the meeting was mainly for information input, that might not be an issue. The HTA has to make decisions, some of which would be unpopular. Ms. Agas was in favor of the move to make committee meetings weekly.

Mr. Ching was also in support. He pointed out that different sections of the tourism industry were at various stages of switching to regenerative tourism and more responsible travelers. Not everyone was committed to this change, but the HTA had decided long ago to make this change. Progress took time, and sometimes, people were disappointed by the lack of instant progress. Over the past two years, he noted that the language used sometimes implied that some people were not positive about supporting responsible tourism. Mr. Ching cited his experience that the most common complaint in every business was a lack of communication. This was sometimes used as an excuse even when it was not true, but in general, he had realized that it was essential to provide as many options as possible. In particular, he recommended giving opportunities for people to contribute workable ideas rather than coming to the HTA with problems that needed solving. Experience has shown that the most effective solutions to problems usually occur at the community level. Mr. Ching supported weekly meetings of this committee and undertook to make every effort to be part of them.

Chair Paishon-Duarte responded that certain community segments needed to do more to support regenerative tourism. It was a healthy exercise to hold the community accountable. The HTA needed to hear ideas, but these needed to be organized and practical suggestions that could be worked on and channeled to other partners.

Mr. Ka’anā’anā stated that he concurred with the support expressed by the previous speakers, especially Mr. Ching. The steering committees on the various islands had mechanisms that could be enhanced, and destination managers were another layer of

this. The Board had established programs that were investments in shifting the industry towards regenerative tourism. The Destination Stewardship contract with Kilohana involved community tourism collaboratives encouraging regenerative tourism. Weekly meetings of the Ho'okahua Standing Committee would enhance all these processes.

Mr. Ka'anā'anā pointed out that Mr. Cole would need to support the standardization of language because weekly meetings would be a burden for the HTA staff to meet legal requirements for meeting agendas and packets. He suggested that it might be possible to standardize language and a template for the agenda since the primary purpose of the meeting would be to get feedback. Mr. Cole responded that this would probably be possible.

Chair Paishon-Duarte stated that her preference would be for the meeting to be scheduled at the same time and day every week, with just two agenda items. She would work with Ms. Anderson to develop two or three standardized questions. She intended that the meeting duration be 45 minutes maximum, emphasizing receiving information and ideas without necessarily involving discussions. Chair Paishon-Duarte suggested that two draft questions to be answered at each meeting would be:

"1. What measures are working, and what can we learn from these measures?"

"2. What new ideas are available to support a move closer to a regenerative tourism model?"

Chair Paishon-Duarte and Mr. Ching would work together to develop additional questions, and Chair Paishon-Duarte requested committee members to send contributions and suggestions by email.

Mr. Hannemann suggested that meetings could be opened to all Board members. He felt that this might be helpful to quorum issues, and it would also make Board members aware of the work of this committee. Mr. Cole stated that while other Board members would be free to attend these committee meetings, their presence did not contribute to the quorum. He also pointed out that the committee meeting could not start without a quorum. If the quorum were to be lost during the meeting, some strategies could be used to continue the meeting. He also pointed out that making a motion to approve this agenda item was unnecessary. The purpose of these weekly meetings would be to receive public comments and information.

Chair Paishon-Duarte clarified that one of the weekly meetings would be the regular monthly meeting. Mr. Hannemann asked whether a quorum would still be necessary if

the purpose of the meeting were to receive information rather than to make decisions. Mr. Cole pointed out that although specific interactions were permitted, others were prohibited. He recommended maintaining the structure of a regular committee meeting but promised to check on the legal aspect.

6. Adjournment

Chair Paishon-Duarte called for an adjournment and thanked the committee members for their time and input. The meeting was adjourned at 10:07 a.m.

Respectfully submitted,



Sheillane Reyes
Recorder

5

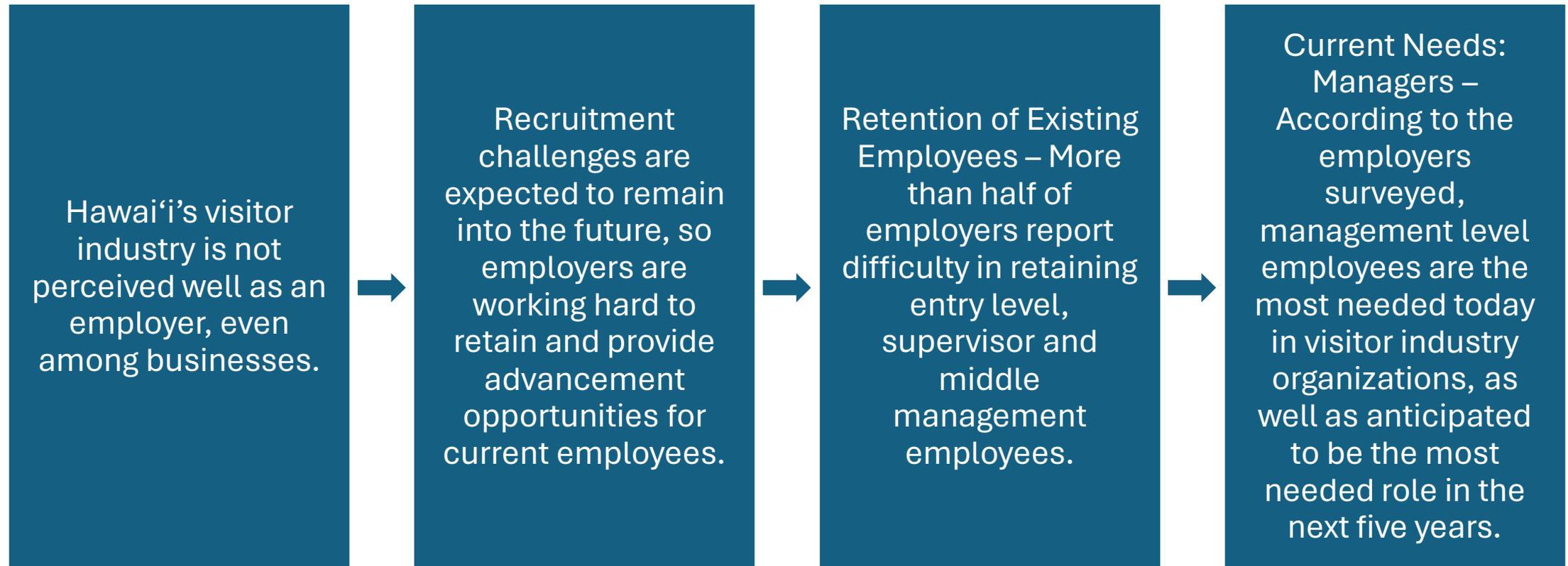
Presentation & Discussion on HTA's Workforce Development Plan



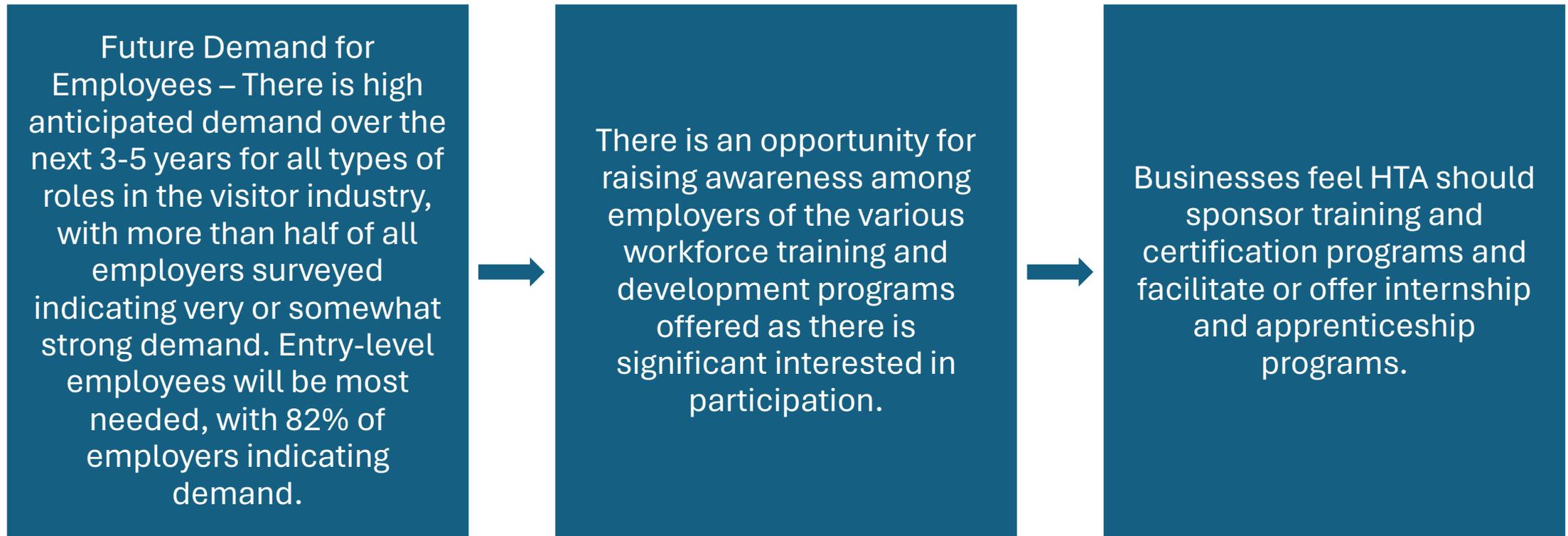
HTA's Tourism Workforce Development Plan

- Presentation to HTA Hookahua Hawai'i Committee
- May 20, 2024
- Presented by Caroline Anderson, Director of Planning

2022 Needs Assessment Key Findings



2022 Needs Assessment Key Findings



HTA's Focus



Position Hawai'i's visitor industry as a desirable career choice.



Increase awareness of and access to existing programs.



Strengthen the current visitor industry workforce.



Prepare the next generation for a successful career in Hawai'i's visitor industry.

FY 2024 Activities

Spring 2024: **Hawai'i Tourism Ho'olina Scholarship Program** with University of Hawai'i at Mānoa

- 7 scholars graduated

Spring 2024: **ClimbHI Leadership Exploration Inspiration (LEI) Program**

- 920 high school and college students on four islands with over 100 businesses.

Summer 2024: Create **Exploration to Hire Events** for high school students and recently graduated seniors

Building Partnerships with DLIR, DOE, DBEDT

Developing tour guide certification curriculum

Proposed FY 2025 Activities

Implement	Implement a Communication and Outreach Program
Build	Build partnerships with University of Hawai'i's School of Travel Industry Management, the University of Hawai'i Community College System, and other training programs
Fund	Fund a program to inspire high school and college-aged students to pursue a career in Hawai'i's visitor industry



Position Hawai'i's
visitor industry as a
desirable career
choice.

FY 2025 Activities

Implement

Implement a Communication and Outreach Program

Build

Build partnerships with DLIR, DOE, UH, DBEDT and the private sector

Assess

Assess need for platform a platform to house the various training and educational programs available and funding for it



Increase awareness
of and access to
existing programs.

FY 2025 Activities

Develop

Develop Industry Sector Partnerships to plan, coordinate and implement workforce development services and strategies.

Support

Support for Chefs through the Culinary Institute of America

Partner

Partner with DLIR to develop programs targeted at the visitor industry, such as internship programs

Build

Build network of professional providers in host cultural training and support development and implementation of Hawaiian cultural trainings targeted at visitor industry.



Strengthen the
current visitor
industry workforce.

FY 2025 Activities

Partner	Partner with UH Mānoa TIM School for the Hawai'i Tourism Ho'oilina Scholarship Program for incoming freshman in 2026.
Develop	Develop pipeline for high school students to enter the workforce, such as Aviation Mechanics, Culinary, Hotel, Transportation, and others
Support	Support the DOE's efforts to continue and grow Academies of Hospitality and Tourism and the CTE pathway for Hospitality and Tourism Management and Culinary Arts
Support	Support externships for DOE teachers so they have the knowledge and resources to teach their students



Prepare the next generation for a successful career in Hawai'i's visitor industry.

Outcomes

Short-Term

More students see the value of tourism and are interested in hospitality/ tourism management/culinary sector
Visitor Industry Sector Partnership is established
Tour Guide Program design and process is completed
Training and certification programs support advancement opportunities

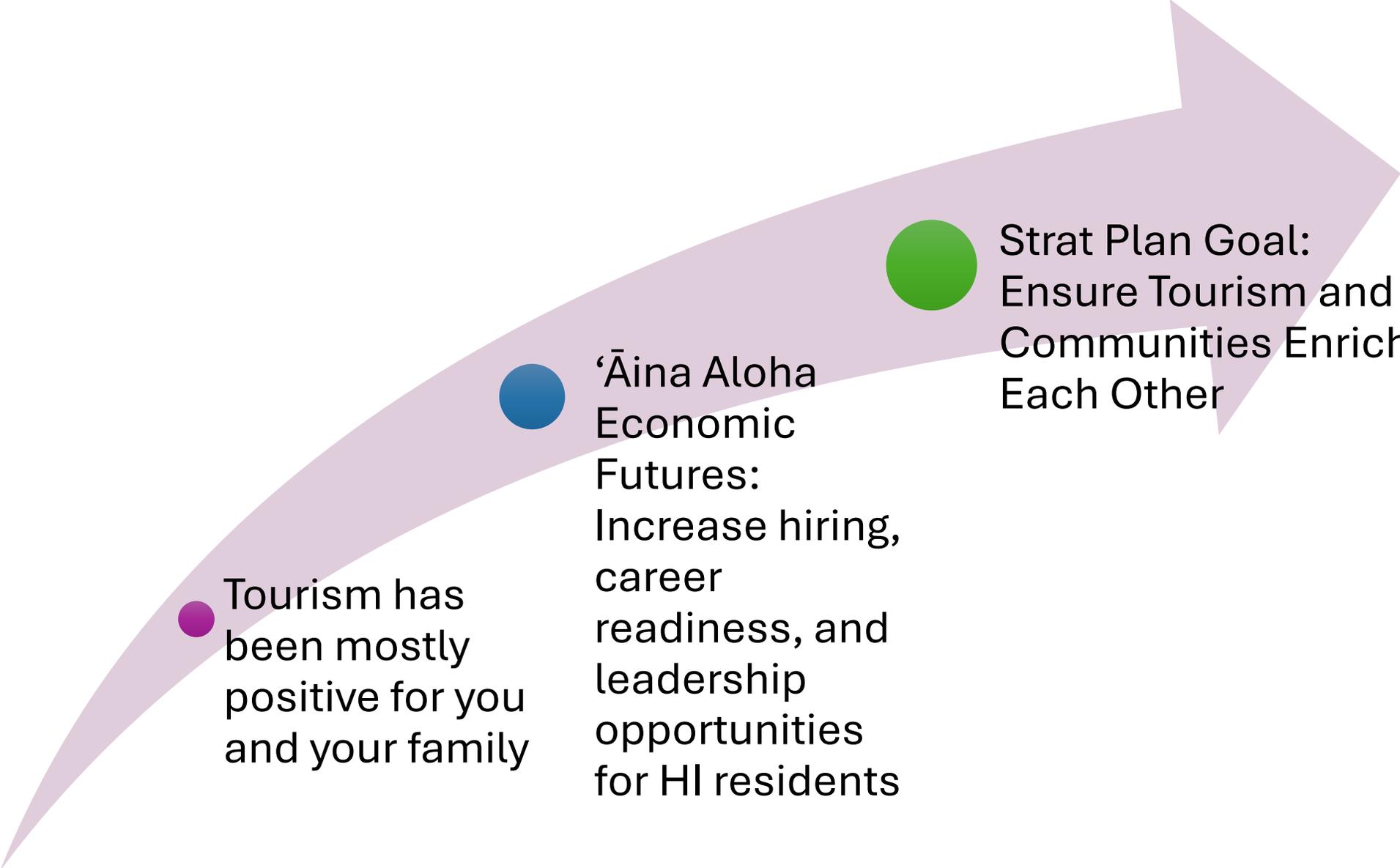
Mid-Term

More local students in college-level studies in visitor industry
Majority of tour guides are certified and provide visitors with meaningful, authentic experiences
An effective hospitality/tourism management/culinary arts pathway system is developed and supported.
Interest to pursue a career in Hawai'i's visitor industry increased

Long-Term

Tourism creates job opportunities for residents. (RSS)
Percent of residents born & raised, and/or educated in Hawai'i in visitor industry management positions.
New supply of workers

Workforce Development Program Goals



Tourism has been mostly positive for you and your family

‘Āina Aloha Economic Futures:
Increase hiring, career readiness, and leadership opportunities for HI residents

Strat Plan Goal: Ensure Tourism and Communities Enrich Each Other

6

Presentation & Discussion on ClimbHI LEI Program

Leadership. Exploration. Inspiration.



HAWAII'S STRONG

Hawai'i



LEI Program

(Leadership Exploration Inspiration)

12 Years

Engaged 9,900 students across the state

climbHI

Example of LEI Full-Day Schedule:

- 9:15am-10:30am: Students will engage with industry members and participate in activities to get an overview of the different departments in the hospitality industry.
- 11:00am-1:00pm: Luncheon with leadership and inspiration through guest speakers and Hawaiian culture/sense of place trainings.
- 2:00pm- 3:30pm: Exposure Fair (speed-dating style) to expose students to the vast career paths available in the many entities connected to Hospitality.
- 3:30pm-4:00pm: Program Closing, Awards, and Remarks



12th Annual LEI Summary - 2024

4 events on 4 islands

Island	Date	Location
Maui	4-Apr-24	Fairmont Kea Lani
Hawaii Island	April 9-10, 2024	Mauna Kea Resort
Kauai	16-Apr-24	Sheraton Kauai
Oahu	22-Apr-24	Hawaii Convention Center



- Support from HTA = \$99,480
- Participants = 1,005
- Schools Statewide = 52
- Exposure Fair Businesses = 129
- Host Hotels = 45

Metric Details

Island	Date	Location
Maui	4-Apr-24	Fairmont Kea Lani
Hawaii Island	April 9-10, 2024	Mauna Kea Resort
Kauai	16-Apr-24	Sheraton Kauai
Oahu	22-Apr-24	Hawaii Convention Center

Participants by Island				
	High School Students	Teachers	College Students	Grand Total
Maui	163	11	34	208
Kauai	152	11	Program on hold	163
Hawaii Island	43	10	5	58
Oahu	455	53	68	576
Total	813	85	107	1005

Participating Schools	
Island	# of Schools
Oahu	23
Kauai	5
Big Island	10
Maui	7
Colleges	7
Total	52

Exposure Fair Participation	
Island	# of Entities
Maui	45
Hawaii Island*	6
Kauai	27
Oahu	51
Total	129

*Educational sessions vs Exposure Fair

Hotels That Hosted Students	
Island	# of Hotels
Maui	7
Hawaii Island	2
Kauai	6
Oahu	30
Total	45





Inspiration from Hawai'i's Leaders

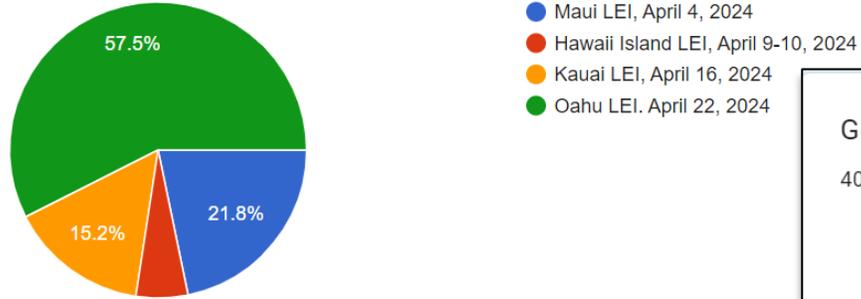


<https://vimeo.com/945915629/d17ac13187>



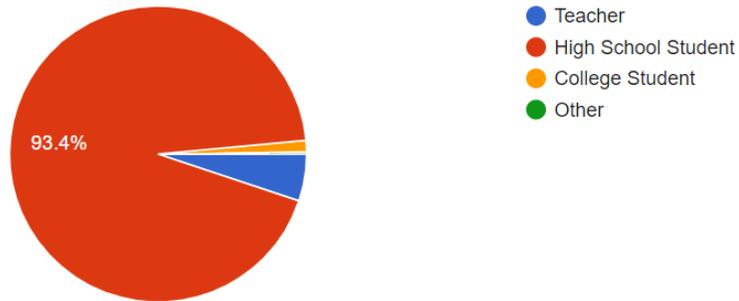
Which LEI event did you attend?

409 responses



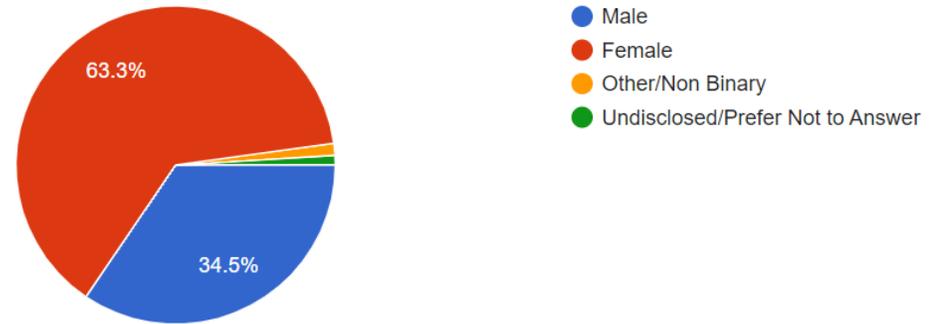
Please select your appropriate role for LEI?

409 responses



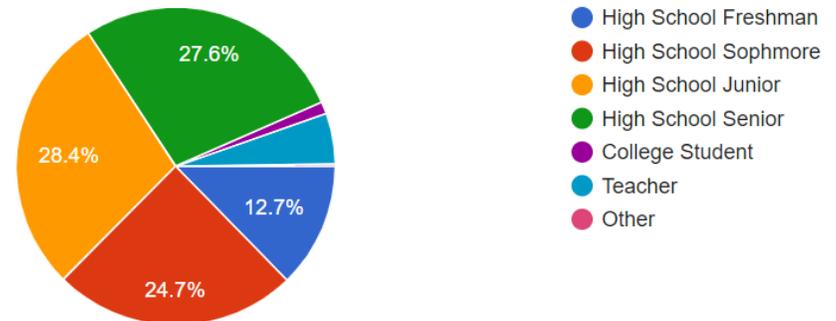
Gender

409 responses



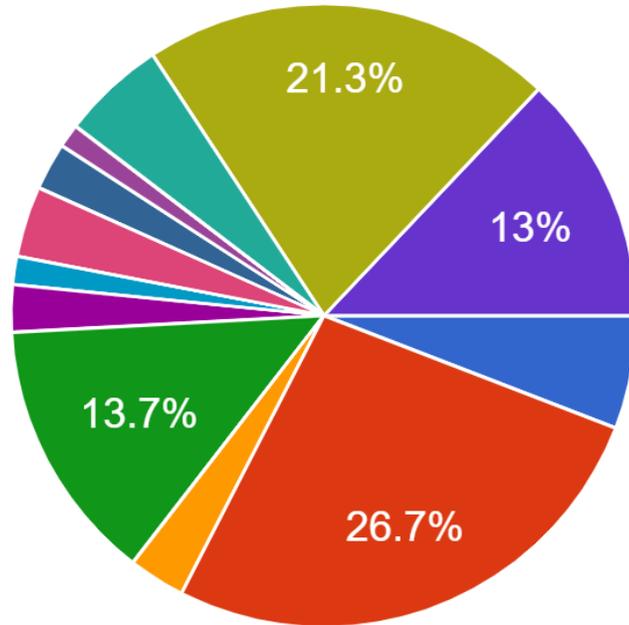
Current Education Level

409 responses



Pathway of Education

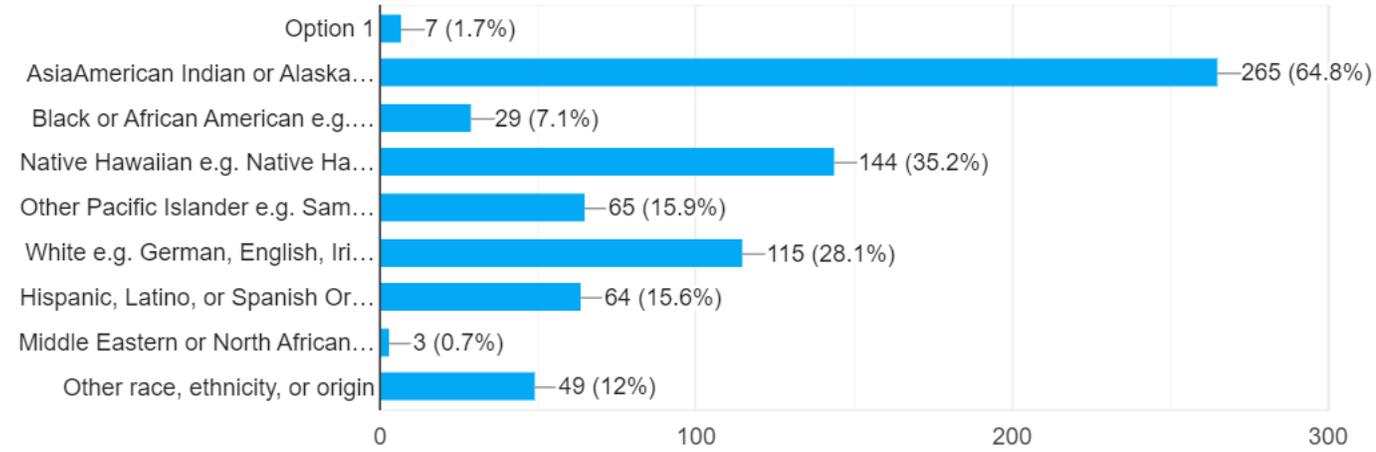
409 responses



- Agriculture, Food, Natural Resource
- Business, Management, Finance, Mar...
- Culture Arts, Media, Entertainment
- Health Services
- Law & Public Safety
- Information Technology & Digital Tran...
- Building & Construction
- Advance Manufacturing
- Architectural Design & Engineering Technology
- Transportation Services
- Education
- Hospitality, Tourism, Recreational
- Other

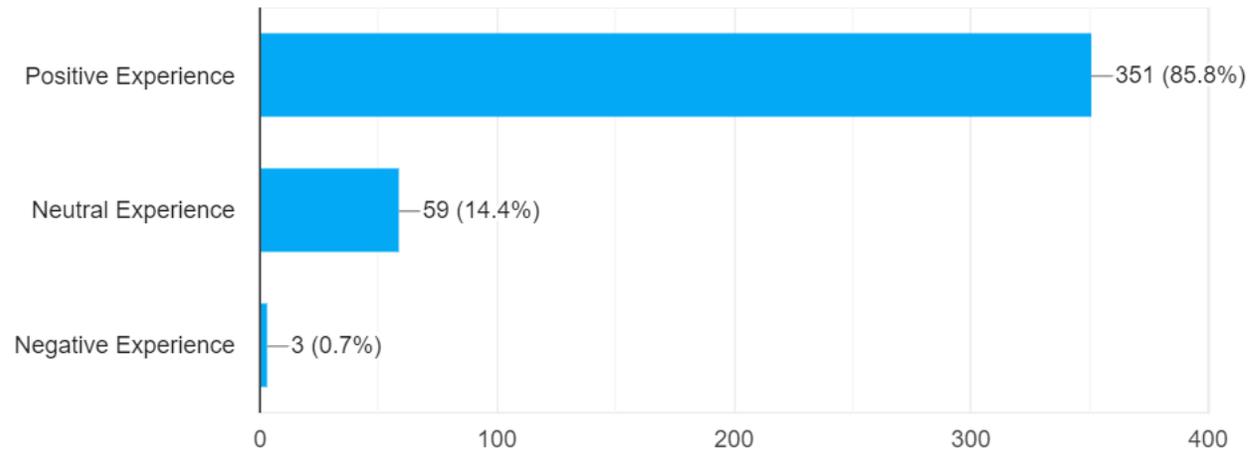
Race: (Select all that apply)

409 responses



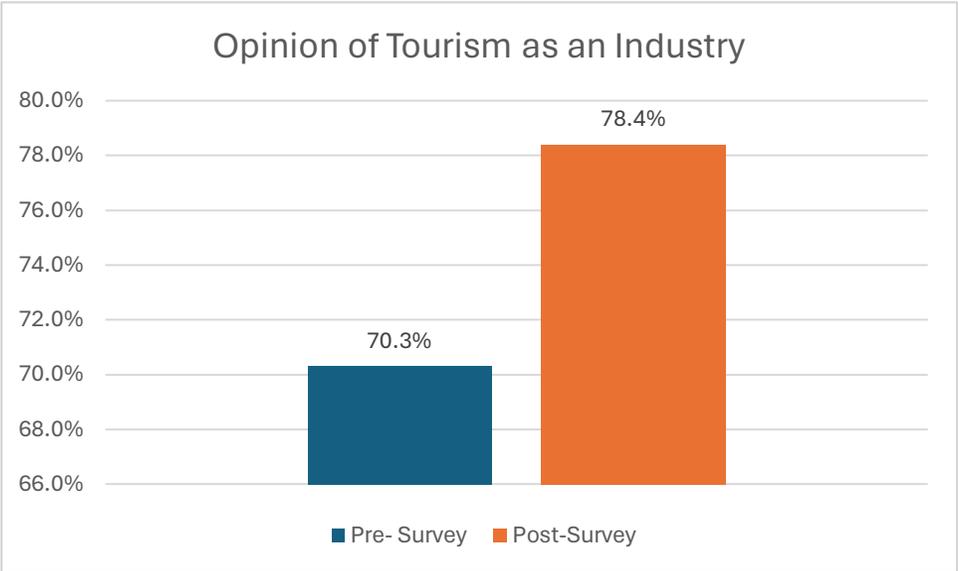
Please rate your experience at our 12th Annual LEI Program? (please check one)

409 responses

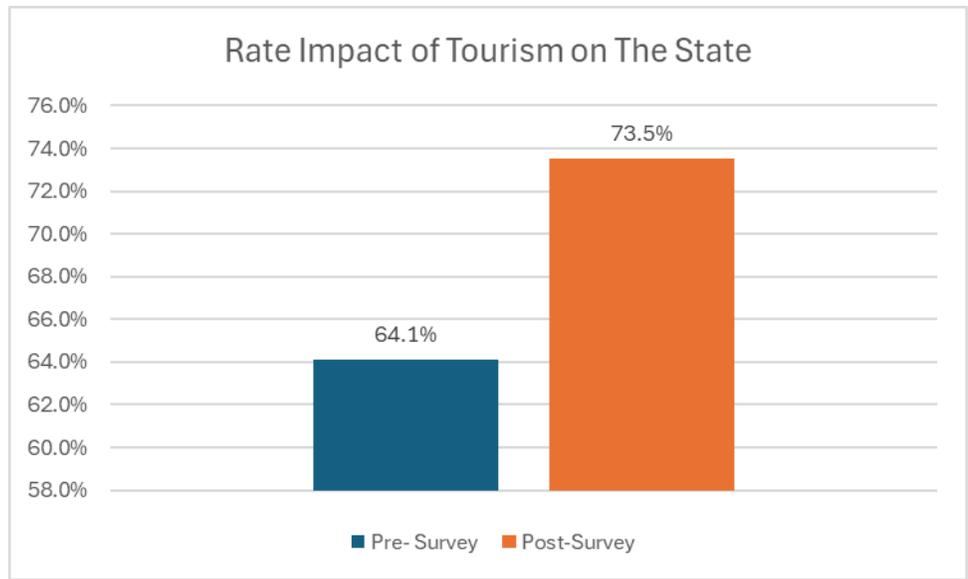


Participant Sentiment: % of responses with a score of 6 or higher

Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give your opinion of tourism as an industry in Hawaii.



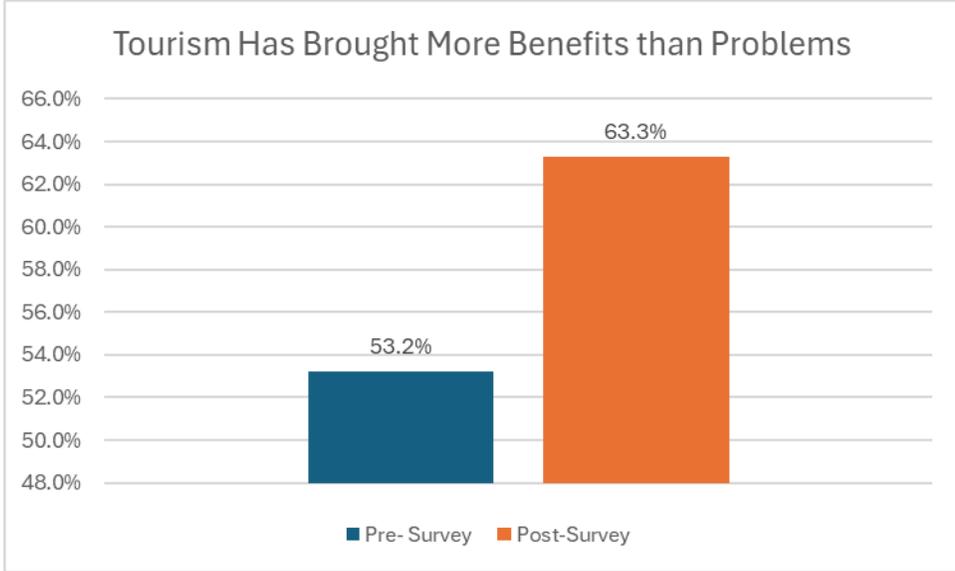
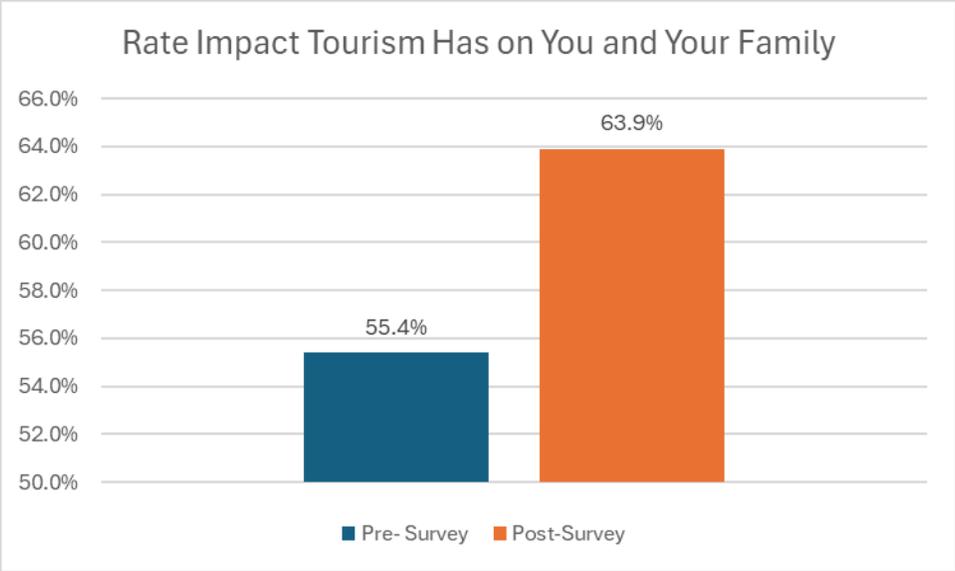
Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on The State as a whole?

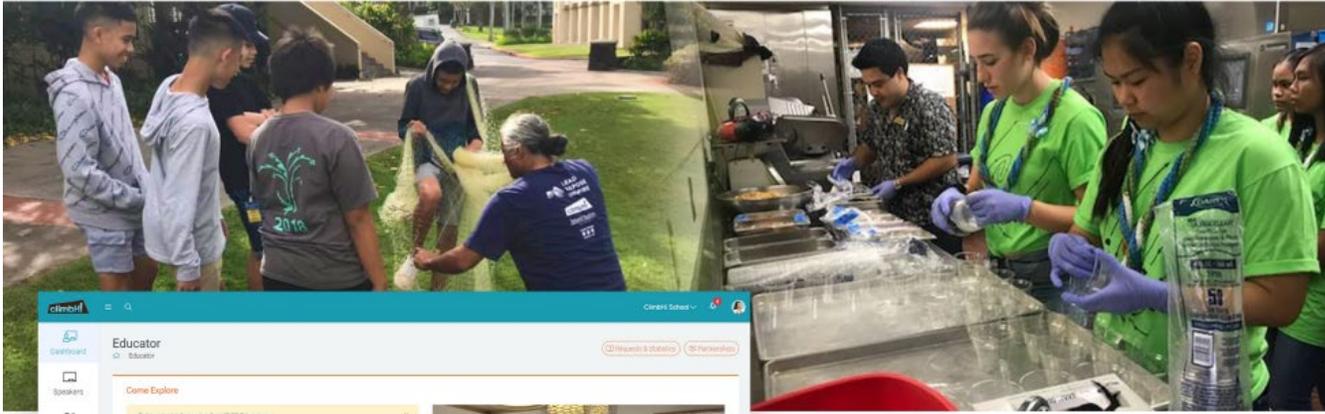


Participant Sentiment: % of responses with a score of 6 or higher

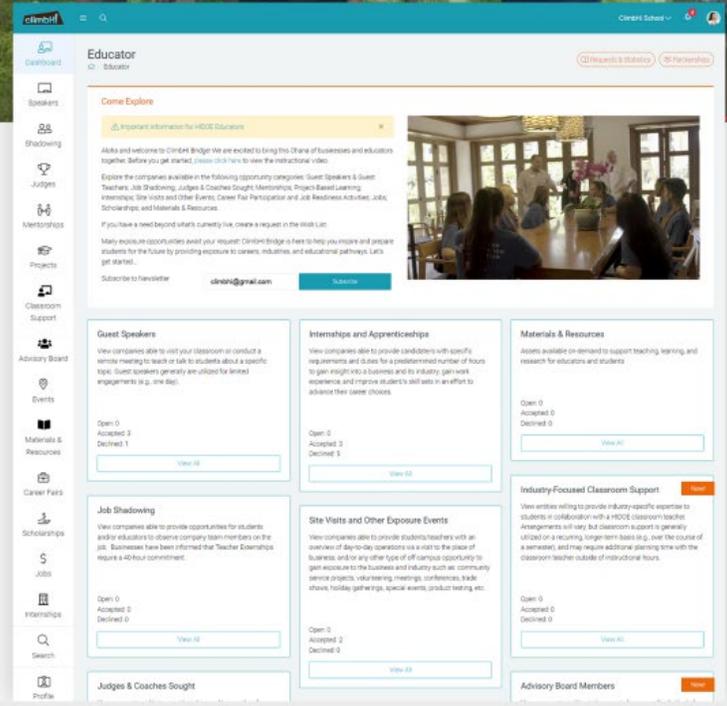
Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on You and Your Family?

Please express how much you agree or disagree with this statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10. "Tourism has brought more benefits than problems."





250,000 Students
 16,000 Educators
 13,268 Hours Given
 1,858 Accepted Requests



- Advisory Boards
- Career Fair Participation and Job Readiness Activities
- Guest Speaking
- Industry-Focused Classroom Support (Ex: Volunteer Teaching)
- Internships
- Job Shadowing
- Jobs
- Judging & Coaching
- Materials & Resources
- Mentorships
- Project-Based Learning
- Scholarships & Awards
- Site Visits and Other Events

<https://bridge.climbhi.org>

MAHALO TO:



	School	# of Accepted Requests
1	Pearl City High School	40
2	Waipahu High School	37
3	James Campbell High School	36
4	Kohala High School	31
5	Aliamanu Middle School	27
6	King David Kalakaua Middle School	23
7	Wai'anae Intermediate School	20
8	Liholiho Elementary School	19
9	Kapolei High School	16
9	Konawaena Elementary School	16
10	Holomua Elementary School	15
10	McKinley High School	15
11	Honokaa High and Intermediate Scho	14
11	Farrington High School	14
11	Halau Ku Mana Public Charter School	14
11	Kalei'opu'u Elementary School	14
11	August Ahrens Elementary School	14
12	Kea'au Middle School	13
12	Kapolei Elementary School	13
12	Waipahu Intermediate School	13
13	Radford High School	12
13	Pearl Ridge Elementary School	12
13	Ke Kula O Ehunuikaimalino	12
14	Waianae High School	11
14	Kalaheo High School	11
15	Samuel Wilder King Intermediate Sch	10
15	Kealakehe High School	10





2023 Community Engagement Awards Outstanding Businesses

Organization	# of Accepted Events
Hawaiian Airlines	52
The Queen's Health Systems	27
Healthcare Association of Hawaii	23
HMSA	22
Mauna Kea Resort	20
International Union of Painters and Allied Trades, District Council 50	19
University of Hawaii at Manoa College of Engineering	18
Oahu Invasive Species Committee	15
Hawaii State Federal Credit Union	13
Chamber of Commerce Hawaii	12
Diagnostic Laboratory Services, Inc.	12
National Oceanic and Atmospheric Administration (NOAA)	11
Prince Waikiki	11
Canada-France-Hawaii Telescope	10
Booz Allen Hamilton	10
Second Wave Technologies	10
Blue Ocean Mariculture	10

Organization	Total Hours
Healthcare Association of Hawaii	2204
Mauna Kea Resort	268
Prince Waikiki	260
Hawaiian Airlines	177
Alaska Airlines	133

Keeping Hospitality Top of Mind



CLEAN ENERGY
SECTOR

CREATIVE
INDUSTRIES
SECTOR

ENGINEERING
SECTOR

HEALTHCARE
SECTOR

IT/TECH
SECTOR



**HOSPITALITY
FORME**

Our Home, Our Aloha, Our Future!





CTE PATHWAY ROLLOUT TIMELINE

SUMMER 2020

ROLLOUT:

- Law and Public Safety
 - Education
1. *New ACCN for course registration guides*
 2. *Teacher Workgroup*
 3. *PAC Workgroup*
 4. *Teacher PD*

SY 2020-21

TRANSITION YEAR:

- Law and Public Safety
- Education

ROLLOUT:

- Architecture and Engineering
 - Health Services
 - Building and Construction
 - Transportation Services
1. *New ACCN for course registration guides*
 2. *Teacher Workgroup*
 3. *PAC Workgroup*
 4. *Teacher PD*

(DUE TO COVID-19 TRANSITION YEAR FOR LAW AND PUBLIC SAFETY AND EDUCATION MOVED TO SY 2021-22)

SY 2021-22

TRANSITION YEAR:

- Architecture and Engineering
- Health Services
- Building and Construction
- Transportation Services

ROLLOUT:

- Advanced Manufacturing
 - Energy
 - Information Technology
 - Agriculture, Food, and Natural Resources
 - Business
1. *New ACCN for course registration guides*
 2. *Teacher Workgroup*
 3. *PAC Workgroup*
 4. *Teacher PD*

SY 2022-23

TRANSITION YEAR:

- Advanced Manufacturing
- Energy
- Information Technology
- Agriculture, Food, and Natural Resources
- Business

ROLLOUT:

- Hospitality, Tourism, and Recreation
 - Cultural Arts, Media, and Entertainment
1. *New ACCN for course registration guides*
 2. *Teacher Workgroup*
 3. *PAC Workgroup*
 4. *Teacher PD*

SY 2023-24

TRANSITION YEAR:

- Hospitality, Tourism, and Recreation
- Cultural Arts, Media, and Entertainment



[Congratulations 2023 Recipients](#) (click to expand)

Come Explore

🔔 Important information for HIDOE Educators

Since the launch of ClimbHI Bridge in January 2021, participating organizations have accepted over 1,000 requests leading to engagement of over 68,000 students statewide.

To hear success stories and ideas from educators, [click here](#).

Portal user guides:

Information video: [click here](#)

Quick reference guide: [click here](#)

If you need help with your requests or have any questions, please click on [Support](#) and create a ticket.



Our Home, Our Aloha, Our Future!



GET STARTED



LEARN MORE

CLEAN ENERGY
SECTOR

CREATIVE INDUSTRIES
SECTOR

ENGINEERING
SECTOR

HEALTHCARE
SECTOR

IT/TECH
SECTOR

Full-Suite of Resources for Hospitality

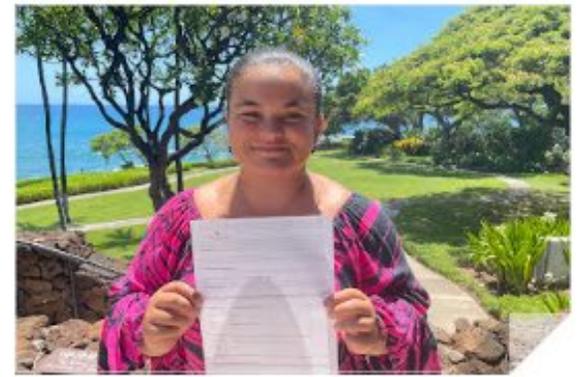
HOW YOU CAN HELP:

- ✓ Become a Hospitality for Me partner
- ✓ Sponsor Service Excellence Certificates for Students
- ✓ Join ClimbHI Bridge, a portal connecting over 500 businesses and 3,400 educators across the state, to support school needs while building your workforce pipelines in the following categories:

Advisory Boards
Career Fair Participation and Job Readiness Activities
Guest Speaking
Guest Teaching/Volunteer Teaching
Internships
Jobs

Job Shadowing
Judging & Coaching
Materials & Resources
Mentorships
Project-Based Learning
Scholarships & Awards

- ✓ Participate and support existing student hospitality programs like Leadership, Exploration, Inspiration (LEI), and/or open your own initiatives to students like conferences or company-wide events.
- ✓ And much more...
- ✓ Get started by emailing **info@climbhi.org**



Not just fill our pipelines with local talent, but also help our keiki gain skills to become the leaders of our companies.

Help our keiki not only achieve economic self-sufficiency, but more importantly thrive in Hawai'i

Leadership. Exploration. Inspiration.



HAWAII STRONG



7

Kilohana Contract Updates

7a

Quality Assurance Program



Qurator

HONORING HAWAI'I



Qurator

HONORING HAWAII

*HTA's Quality Assurance Program **Qurator** welcomes all businesses in the visitor industry and celebrates the positive contributions made to the economy, community, and environment.*

OFFERS GUIDANCE
TO VISITORS

ADDS VALUE &
ENCOURAGES
COMPETITION

COMMUNICATES
PRIORITIES TO RESIDENTS
AND LOCAL BUSINESSES

GROUNDBREAKING

What makes Qurator unique?

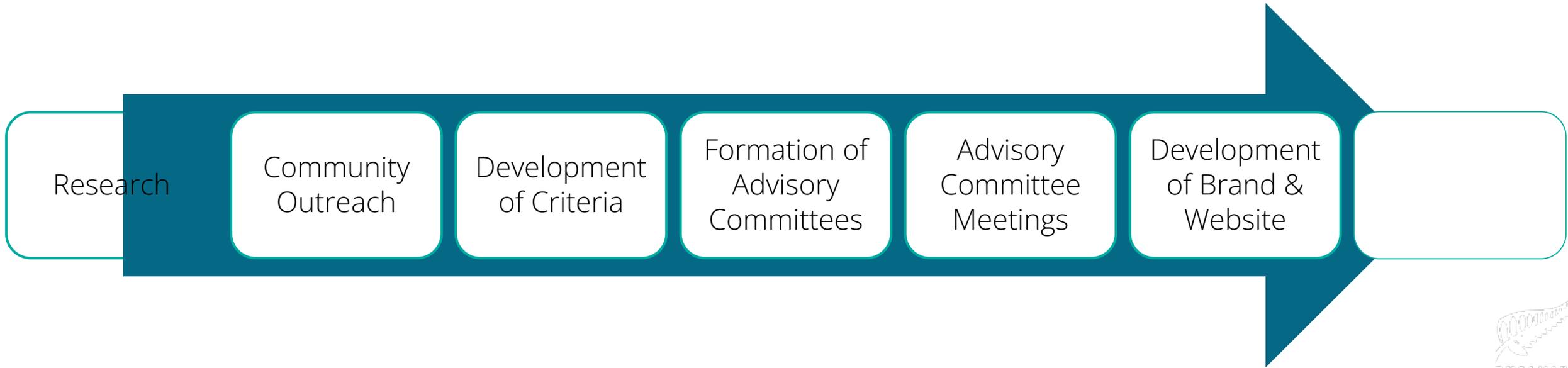
Qurator is believed to be the most inclusive Quality Assurance program in the world based on the breadths of:

TOPICS

CAUSE

ELIGIBILITY

COMMUNITY FIRST



Over 100 outside groups were consulted before the criteria were written including, but not limited to:



PEOPLE TEAM

ADVISORY COMMITTEE

Cody-John Sakamoto

Kelly Camps

Kawika Freitas

Cade Watanabe

Joe Ibarra

Meli James

Tetsuya (Ted) Kubo

Sheryl Matsuoka

Sherry Menor-McNamara

Alisa Onishi

Pomai Weigert

UH Mānoa

Polynesian Adventure Tours

Old Lāhainā Lū‘au

Unite Here

The Kāhala Hotel & Resort

Mana Up

JTB Hawai‘i

Hawai‘i Restaurant Association

Chamber of Commerce

Hawaiian Airlines

GoFarm Hawai‘i



PLACE TEAM

ADVISORY COMMITTEE

Daniel Chun
Curt Cottrell
Toni Davis
Kelly Knox
Angela Murphy
Rob Pacheco
Makana Reily
Chassidy Sakamoto
Ulalia Woodside
Sandy Weir
Kawika Freitas

Alaska Airlines
DLNR State Parks
Activities & Attractions Association
Southwest Airlines
Outrigger Hospitality Group
Hawai'i Forest & Trails
Multiple
UH Mānoa
The Nature Conservancy
Norwegian Cruiselines
Old Lāhainā Lū'au

ONE CERTIFICATION FOR ALL





ELIGIBILITY

All businesses in the visitor industry are welcome to participate in Quator, as long as they are:

PHYSICALLY
PRESENT IN
HAWAII

FULLY
LICENSED

IN GOOD
LEGAL STANDING

The criteria are designed to apply to businesses of any size, and any travel vertical: airlines, cruise lines, hotels, food service, tours, transportation, attractions, retail, and beyond.



CRITERIA

300
YES / NO / NA
QUESTIONS

AVERAGE PARTICIPANT RECEIVES 150-225 QUESTIONS



CATEGORIES



DRAFT



SCORING

**INDEPENDENTLY
ADMINISTERED**

**10 DAY BENCHMARK
FOR INITIAL RESULTS**

**BADGES &
TIERS**



CERTIFICATION AUDITS

25 QUESTIONS
REMOTELY ADMINISTERED

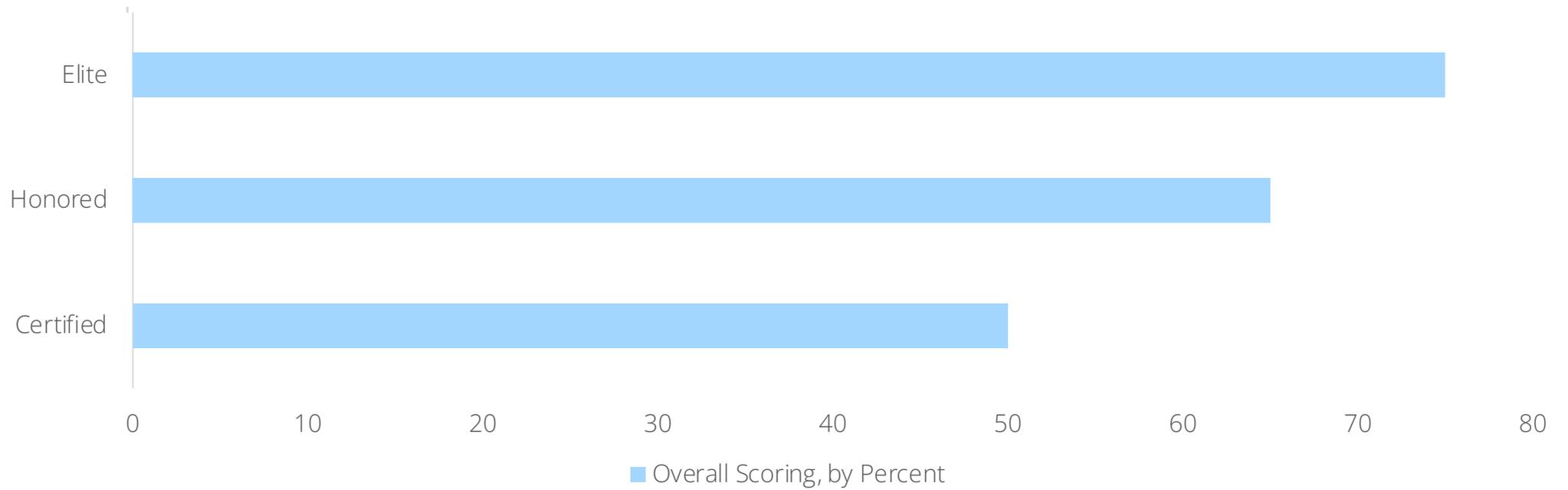
10 universal

10 random

5 auditor's discretion

CERTIFICATION TIERS

Overall Scoring, by Percent





FORMAL CERTIFICATION

After the audit is completed, Kilohana will provide a welcome kit to qualifying businesses which includes:

- Explanation of scoring
 - Physical and digital assets to display
- Press release announcing their participation
 - Details on benefits



RECERTIFICATION



**CERTIFICATION
LASTS 1 YEAR**



**SIMPLE
PROCESS**



**ANNUAL
RECERTIFICATION
AUDIT**



TIMELINE

May 2024	Pilot Program Begins
May 22, 2024	Pilot Program Ends
June 3, 2024	Website Live
June 2024	Launch
Oct 2024	Satisfaction Survey
Dec 2025	Fund Through Date



FUTURE VISION

Qurator seeks to serve as a hub of good news by **acknowledging and encouraging beneficial impacts** upon the community of the visitor industry's positive actions.

Qurator also **strengthens the Hawai'i brand** and positions the state to benefit from providing and identifying **quality experiences to quality travelers** via wholesale and consumer direct marketing.



PARTICIPATION

www.qurator.travel

Website launch in May

HAWAII TOURISM™
AUTHORITY



MAHALO!

Pre Qualifications

These are basic pre-qualifications to participate in the Quality Assurance Program. If you can not answer yes to all these questions, do not proceed with the rest of the certification and contact the Program Administrator for your next steps.

Item	Yes	N/A	Additional Information
Do you have a valid Hawai'i Business License?			
Do you have all required licenses for operation, including mandatory employee certifications ?			<i>This includes employee certifications of any kind: TWIC, DOT, Food Handlers, Etc.</i>
Are you current on all tax filings and payments?			<i>This generally means current on tax filings with no outstanding delinquencies or investigations</i>
Do you do business in the travel and tourism industry?			
Does your business have employees in Hawai'i?			<i>You may include owners and others not classified as "employees" who are physically present in the state</i>
Do you have a physical presence in Hawai'i?			
Do you have a website?			
Do you support affordable housing by not removing housing inventory from the market which might otherwise be filled by local residents?			<i>Fully licensed owner-occupied units in full compliance with reporting and tax requirements are exempt</i>
Have you been in business at least one year, or has a principal owner of the company or operational manager worked onsite in Hawai'i in the travel and tourism industry for at least 5 years?			
Do you follow all applicable federal, state, and county commercial regulations and guidelines ?			<i>This includes all guidance, specifically including marine wildlife and environmental protection.</i>
Is your company free from convictions, fines or sanctions imposed by any governing body in the last three years for activities related to your business?			<i>This includes DOT, OSHA, PUC, and any other state or federal agency having oversight of your business related to activities in Hawai'i. If you have been sanctioned and corrected the violation, please call or email the QA Program Administrator for further instructions.</i>
How many Employees do you have in the state of Hawai'i?			<i>This number is used to complete scoring on the remaining pages to determine your spot on the sliding evaluation scale</i>

Cultural Support				
This category addresses issues relating to the support of cultural practices on The Hawaiian Islands. Art, Sport, Dance, and other activities unique to our area which promote community vitality, indigeneous prosperity and a sense of place to all residents and visitors.				
Item	Response			Notes
	Yes	No	N/A	
Do you display art by artisans who have demonstrated knowledge and respect of Native Hawaiian culture, traditions, and people?				<i>This applies to objects like paintings, sculptures, etc specifically focused on Hawaiian culture.</i>
Do you support artisans who have demonstrated knowledge and respect of Native Hawaiian culture, traditions, and people by displaying their live performances to the public?				<i>This item applies to live performances: dance, music, etc specifically focused on Hawaiian culture.</i>
If you answered no to the first two questions, do you support other local artists by displaying their work or showcasing their live performances in your public spaces?				<i>"Local" meaning made within the state of Hawai'i.</i>
Do you play pre-recorded music by Hawaiian artists in your public spaces/during the experience you provide?				<i>Either background music or featured entertainment are acceptable</i>
Do you offer locally made art or crafts for sale to support local practitioners?				<i>For tour operators, stopping in locations selling local artisan products qualifies for credit</i>
Do you have a process to make sure all art and materials you use in creating, marketing, and operating your products credit the original artists, including the payment of royalties when appropriate?				<i>This includes not using royalty-free images. Images owned and created by and for the company do not require credits to the artists.</i>
Do you tell or promote stories told about the history of the islands?				<i>This may include any of the multi cultural experiences of Kama'aina.</i>
Do you offer or display a Land Acknowledgement?				<u><i>No specific version is required. This cell is linked to the NPS Version. UH Manoa also offers a commonly used option. Any appropriate acknowledgement is acceptable.</i></u>
Do you portray images of Hawaiian culture in your promotional materials?				<i>Any of Hawaii's multicultural history is acceptable, this is not limited to Native Hawaiian images.</i>
Do you train customer facing staff in Hawaiian Cultural practices during onboarding, specifically any areas which intersect with your business?				<i>Is staff trained to tell the story of the arts and performances, or history of the location, or any other significant interactions with local culture your guests may have?</i>
Do you refresh cultural training for customer facing staff at least annually?				
Do you make employees aware of additional cultural educational courses available to them?				<i>Any online or in person supplemental training is acceptable.</i>
Do you offer any signage in 'olelo Hawai'i, whether alone or with identical text in another language?				

Do you have any formal partnerships with existing Cultural Practitioners, or other cultural groups to promote Hawaiian Culture?				
Do you sponsor or provide in-kind support for any cultural events in Hawai'i (music, dance, sport, arts)?				<i>Sponsor = monetary support; In-Kind = non-monetary support like offering free event space, food, etc</i>
Do you have a designated staff member to address community concerns about your business?				
Do you actively solicit feedback from the community regarding your impact?				
Do you have any products which specifically revolve around cultural experiences?				<i>Examples include tours focused exclusively on Native Hawaiian culture, Tasting Menus of only locally produced foods and traditional recipes, etc</i>
Immediately prior to visiting cultural sites, do you advise guests on appropriate behavior?				
Do you make charitable donations to causes specifically promoting culture in Hawai'i?				<i>Can include partnerships with schools, training centers, government agencies, etc.; Does not include sponsorship of events (asked elsewhere.)</i>
Do you operate or financially support volunteer opportunities for guests or employees?				
Do you have outreach programs to encourage Native Hawaiians to apply for your open jobs?				
Are your employee uniforms themed or influenced in Native Hawaiian styles, or does your dress code permit aloha attire?				<i>If safety issues prohibit this, choose N/A</i>
Are your public spaces themed or influenced by Native Hawaiian style or influence beyond displayed art?				<i>This question addresses fixtures, furnishings, architecture, and color schemes. Art is addressed in an earlier question.</i>
Ki'i (also known as tiki) are not used on site or in promotional materials unless appropriately representing a sacred site.				
Lei sold or distributed are made from locally sourced materials.				<i>Note that the commonly found Purple Orchid / Dendrobium Leis are not typically made of locally grown indigenous flowers, but because of their well known association with Hawai'i, the Certification Program will allow this to be considered "locally sourced" at this time.</i>
Do your marketing materials abide by HTA's ma'ema'e toolkit guidelines?				https://www.hawaii tourism authority.org/media/10516/maema-e-toolkit_wi thspread.pdf
Do you list proper Hawaiian place names?				<i>This does not need to be exclusive-the English and 'Olelo Hawai'i may both be shown.</i>
Are you permitted to adjust your brand standards to accommodate the local market?				<i>Example: local exceptions for uniforms or menu items, etc. Applies to companies which are based outside of the Hawaiian Islands who operate under established franchise or brand standards only.</i>
Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.				

Safety				
This category focuses specifically on the health and safety of guests, employees, and the community. This category only addresses issues related to human life.				
Item	Response			Notes
	Yes	No	N/A	
	Do you have a safety committee which meets regularly?			
Do you provide safety training to all employees during the onboarding process?				
Are all workers trained and required to report risk or safety issues?				
Do you require additional safety training beyond the legal minimum?				<i>This can include either more training than required, or training more employees than required.</i>
Do you proactively solicit input regarding safety from all employees at least annually?				
Do you use third party accredited safety training?				
Is there a formal anonymous system in place to report safety concerns?				<i>If your operation is too small to allow for anonymous reporting, choose N/A</i>
Do you have a designated employee in charge of safety in each department?				
Do you provide ongoing safety training at least quarterly?				
Are your safety policies and guidelines available in a written format and easily accessible to all employees who may need them?				<i>Including multiple languages if required</i>
If inspected by a health authority, are all your most recent food safety scores 85 or higher?				
Do you follow an accredited HACCP plan for food service?				<i>This includes certification of employees and management.</i>
Do you train employees on responsible alcohol service?				<i>TIPS, Ask for Angela/Angel Shot Training, etc</i>
Are food service staff are fully trained on food allergies and allergens?				
Is food served off premises is temperature controlled and fully covered or wrapped until consumed?				
Are workers always given a minimum of two days off each week?				<i>Small business exception: owners of small businesses may claim credit as long as: total weekly hours is <40; and they are not operating heavy machinery, including cars/vans for work purposes</i>
Are workers always given at least ten hours off between shifts?				
Are scheduled employee shifts 8 hours long or less?				
Are employee lunch breaks a minimum of one hour?				
Are you fully staffed?				<i>"Fully staffed" means: at the time of completion of this questionnaire, you are at or above 90% or your expected levels of overall staffing. Applies only to employees based in Hawai'i.</i>
Is key maintenance and safety work is primarily scheduled between 7am and 7pm?				

Do you train employees on ergonomics?				
Do you provide sun protection for employees working primarily outdoors during daylight hours?				<i>Can include sun shades, sunscreen, etc.</i>
Do you train employees not to provide employee work schedules or other personal information to the public?				
Do customer facing staff wear nametags and/or uniforms which make them easily identifiable as employees?				
Do workers who are frequently alone carry on their person radios, panic buttons, or other methods of summoning assistance?				
Do you train employees on protocols for threatening or unsafe guests?				
Do you monitor guest parking areas for safety?				
Are access points monitored and/or controlled?				
Are secured and back of house areas only accesible with a key, swipe card, or other secure entry method?				
Do you regularly make employees aware of mental health support offered?				<i>Can be internal, through an insurance provider, or a third party</i>
Do you maintain written records of employee training and certification?				
Do you have a written crisis management plan and review it at least annually?				
Do you conduct crisis management drills?				<i>Includes things like fire drills, etc. All staff should be included customers/guests are optional</i>
Can you immediatly contact all employees on duty in event of a crisis?				<i>This includes reaching them via a radio broadcast or a text blast</i>
Do you have a safety incident log?				<i>Can be written or electronic</i>
Is there a formal procedure to handle safety complaints: internal complaints, public reviews, news stories, protests, etc?				<i>This procedure does not need to be all-encompassing for every situation. A designated person with designated duties is the minimum to qualify.</i>
Are employees assigned formal roles in emergency situations?				
Is there a first aid kit on your premises and all company vehicles which carry guests and leave your property?				
Are all customer facing employees certified in one of: first aid, choking, or CPR?				
Is there a defibrillator and an epi pen on the property?				<i>For transportation companies, one per vehicle</i>
If yes to above question, Is one on duty employee trained to use it at all times?				
Are relevant employees formally trained on biological hazards?				<i>Biological hazards are anything associated with living things which can harm human health and can include: bedbugs and other insects, human or animal waste, blood, etc.</i>
Are your primary entrance, exits, restrooms, and high traffic doorways touch-free?				

Is hand sanitizer readily available to guests and employees?				
Do you train managers to send sick employees home?				
Do you maintain a key log inventory for keys allowing access to secure areas?				<i>"Other public area" does not need to be on your property. It only needs to be accessible to the public. A street or sidewalk is a good example.</i>
Do you have a policy to prevent employees from holding too much cash?				
Does your business vary its banking deposit routines?				<i>Do you use different bank branches, make deposits at different times of day, take different routes, etc? You may also mark Yes if you use a secure third party to pick up and deliver cash, or if you are cash free.</i>
Do you maintain an up to date list of individuals with access to secure information, including both company and consumer data?				
Are all employees who manage customer data formally trained to properly handle sensitive data?				<i>This includes contact information, credit card data, etc</i>
Do you offer assistance for safety conscious guests in getting to their transportation or their rooms?				<i>May include monitored waiting areas for taxi/rideshare, etc</i>
Do you reserve specific guest rooms for customers who have safety concerns?				<i>Hotels only</i>
Do you forbid the use, rental, or sale of Full Mask Snorkel equipment?				<i>Definition: https://en.wikipedia.org/wiki/Full-face_diving_mask. These masks are considered dangerous to novice and unsupervised snorkelers.</i>
Do you have beachfront safety signage reminding guests of ocean hazards?				<i>Applies if your property is adjacent to beach access</i>
Do you have procedures or equipment in place to prevent slip and falls in event of inclement weather?				<i>May include floor signage, traction mats, umbrella bags, etc</i>
Do you exceed ADA minimum standards?				<i>For hotels, this may apply only to public areas and specific rooms, and include features like improved lighting, roll-in sinks, waist high electrical outlets, etc</i>
Do you provide guest safety materials at the beginning of your experience?				<i>Applies to tours and transportation only.</i>
Are all your relevant public safety materials available in more than one language?				<i>Alternately, images not requiring language may be used.</i>
Do you maintain insurance policies in excess of those required by law?				
Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.				

Guest Experience

This category focuses on the Guest Experience, making all visitors feel welcome, safe, confident, and comfortable.

Item	Response			Notes
	Yes	No	N/A	
	We will tabulate your average customer review scores from sites like Google Reviews, Trip Advisor, and other unbiased third party sites and assign credit as shown in the notes.			
Do you respond to at least 25% of online consumer reviews on sites like TripAdvisor, Google Reviews, Yelp, and your own site (when applicable)?				<i>Responses must be generally polite and non-confrontational.</i>
Do you solicit feedback to measure guest satisfaction?				
Are feedback surveys available in multiple languages?				
Do you have formal procedures to address negative feedback?				
Do you participate actively on social media by posting at least once per week?				
Do you respond to inquiries sent via social media?				<i>Includes responding to messages in any channel where you have a presence: Facebook and Instagram Messenger, Twitter/X tags, etc</i>
Can customers communicate with your business via text, chat, tweet, or similar immediate non-telephone response option?				<i>Does not need to be monitored 24/7</i>
Is your website up to date with current pricing, schedules, and other necessary information?				

Is your advertised pricing fully transparent without additional fees, surcharges, etc				<i>This excludes government mandated taxes and fees, but includes all other costs which are mandatory to your customers, including ticketing and transaction fees.</i>
Is your website freestanding, and not a pass through to Facebook Business, Instagram, or a similar non-branded host?				
Does your website offer multiple languages to accommodate non-English speaking guests?				<i>If you use a third party to market exclusively to non-English guests, answer "yes" here</i>
Does your website contain full and specific information regarding levels of accessibility for ADA guests and others with special needs?				<i>Examples include items like "pool and spa are wheelchair accessible" and "braille menus available."</i>
Do you offer a satisfaction guarantee?				<i>Does not need to be a full refund, just that customer complaints are addressed are resolved to a reasonable extent.</i>
If so, is your guarantee and its terms and conditions visible to the public?				
Do you communicate with your guests/customers pre-arrival?				<i>Applies only if you are able to receive contact information in advance</i>
Do you retain and use guest preferences and information on file for repeat business?				
Are public facing staff trained on your service animal policies, including emotional support animals?				
Do you offer signage in more than one language?				
Can customers be fully accommodated even if they don't speak English?				<i>Must include all services available to English speaking customers at similar levels of service</i>
Are all your relevant guest safety materials available in more than one language?				<i>Alternately, images not requiring language may be used.</i>
Does your website include: contact info and contact hours, location, hours of operation, and menus with current pricing?				<i>Menu information required only for businesses who operate exclusively food service. Hotel, transport, cruise, etc are excluded.</i>
Do you use an automated content manager or channel manager to keep your third party partners up to date?				<i>This can include your reservation software, GDS, or a designated content management software -- anything automated that will update items like hours and pricing.</i>
Do you offer public restrooms for customers/guests?				<i>Transportation and Tour Operators: advising customers of restrooms at stops or before departure is acceptable for credit.</i>
Do you have family or gender neutral/family/assist restroom options?				<i>As these facilities often serve more than one purpose, no specific signage or designation is required.</i>
Do you offer free WiFi?				
Do you offer a water station to fill water bottles?				<i>Tour operators and other transportation may rely on the facilities they visit.</i>
Are feminine hygiene products available in women's restrooms?				<i>Free or via vending machine</i>

Do your public facing employees have at least three days training before interacting with the public without immediate supervision?				
Are your employees trained specifically on the cultural norms and expectations of your international guests?				
Are your public facing employees required to pass an exam before interacting with the public?				<i>Testing can be internal, corporate, or third party</i>
Do you have grooming and appearance guidelines for public facing staff?				<i>Can include uniforms, dress codes, hygiene requirements, etc.</i>
Do you materially reward individual employees for providing quality service?				<i>Can include secret shoppers, customer reviews or comment cards, or other formal methods of obtaining feedback</i>
Do you have a formal policy to coach underperforming employees?				<i>The policy must include quantifiable metrics to measure improved performance.</i>
Do you train employees to greet guests by name when practical?				
Are guests are informed of community volunteering opportunities available to them?				
Do you offer activities/accommodations/products for all ages?				
Do you tailor the experiences of children to engage them?				<i>This includes children's menus, activity sheets, equipment, or other accommodations.</i>
Do you accept any non-US credit cards like JCB or UnionPay?				
Do you protect customer data by not purchasing, selling, or trading it to third parties?				<i>This excludes data transmitted to and through third party sales channels.</i>
Do you have a zero tolerance policy for employees and guests against discrimination by race, sex, gender identification, religion, sexual preference, and other protected classes?				
Do you have staff trained to welcome Autistic guests?				
Are vegetarian and/or vegan options available?				<i>Food Service Only</i>
Do your menus contain allergen information?				<i>Food Service Only</i>
Is your website fully ADA accessible?				<i>This includes all of the latest ADA and Section 508 recommended adaptations for low and no vision guests, captioned videos for hard of hearing guests, and keyboard navigation for physically challenged guests</i>
Do you have staff training or materials available to assist guests with hearing or vision loss?				<i>This could include things like large print menus, braille signage, assisted listening devices, etc.</i>
Does your staff have access to information like number and type of accessible rooms, bed heights, and door width?				<i>Hotels Only</i>
Are your reception desks, cash registers, vehicles, and other transactional surfaces wheelchair accessible?				

Are your pool areas wheelchair accessible?				<i>Minimum one pool, if there are multiple on property.</i>
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Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.

Environment

This category reflects our interaction with the resources of the natural world around us, and the impact that humans and the tourism industry have on that world. It addresses, air, water, land, and wildlife.

Item	Response			Notes
	Yes	No	N/A	
	Are your staff trained on environmental policies and procedures for your business?			
Is your environmental policy unique to, or tailored to Hawai'i?				
Do you consult with or reference guidance from government agencies to form your environmental policies?				
Do you publicly report your efforts <i>and</i> results for environmental sustainability?				
Do you have a written policy on Climate Change?				
Are you part of any industry advocacy groups dedicated exclusively to environmental issues?				
Are staff and guests educated on marine wildlife interaction protocol?				<i>May also include ground nesting seabirds</i>
Are staff trained on water conservation methods?				
Do you remind guests that only reef-safe sunscreen is legal in Hawai'i?				
Are efforts made to use native/non-invasive plants in your landscaping?				<i>Must have control over your outside property to qualify.</i>
Is irrigation is checked and maintained if needed at least monthly to avoid spraying outside of intended areas, such as sidewalks and roads?				<i>If you have property and do no irrigation, you may claim credit</i>
Is your landscaping free from chemical pesticides or herbicides?				<i>If you have land, but do no active landscaping, you qualify for this credit</i>
Do your purchasing policies consider environmental issues such as sourcing, waste, or other environmental concerns?				
If you serve seafood, it is sustainably sourced or locally caught/farmed?				<i>We recommend Monterey Bay Aquarium's Seafood Watch (seafoodwatch.org), but any reliable guidance for sustainability is accepted.</i>
Do you limit single use plastics to only necessary items?				<i>Necessary can exclude items for which there is no viable market alternative available. Example: Trash bin liners</i>
Do you provide reusable plates, cups, and cutlery for all dine in services?				

Have you eliminated the distribution of single use water bottles to guests and employees?				
Is employee drinking water is provided from the tap or filtered on site, and not from a water cooler requiring bottle delivery?				
Have you eliminated providing plastic bags to guests?				<i>Applies to retail, food service, and hotels only</i>
Do you participate in a recycling program?				
Do your guests have a paperless option for transactions?				<i>Transactional items only like tickets, reservations, vouchers, receipts, etc. Non-transactional items (bags, napkins, etc) are excluded.</i>
Do you purchase recycled paper products for business use?				<i>Office paper, napkins, any paper product with recycled content is acceptable.</i>
Are plumbing fixtures (sinks, toilets, showerheads, equipment) inspected at least monthly to minimize leakage and waste?				
Are plumbing fixtures in public and staff restrooms on timers or sensors to limit water use?				
Are your HVAC and Refrigeration systems given routine maintenance at least twice per year?				
Are your hot water pipes and water heaters fully or partially insulated?				
Are guests are encouraged to reuse linens and towels?				<i>Hotels only</i>
Are water reclamation or recapture procedures in use?				
Are sensors are used to manage lighting in frequently unoccupied spaces?				
Is natural lighting intentionally used in place of artificial lighting in some indoor spaces?				<i>Applies to any indoor space where natural light replaces or supplements artificial light</i>
Do you reduce or turn off air conditioning or use occupancy sensors in unused areas?				<i>Take credit if your offices do not use air conditioning.</i>
Is your policy to turn off lighting, computers and office equipment at the end of the workday?				
Do you supplement or minimize air conditioner use by natural means of controlling indoor temperatures: closing blinds, opening windows and doors, turning on fans, etc. ?				
Do you have a formal, written energy management plan?				<i>Can apply to fuel, electricity, or any other energy source</i>
Are guests are offered low carbon or offset options?				

Does your product/experience produce no carbon footprint itself, or do you operate at Net Zero Carbon?				<i>Limited to the activity itself, not considering external efforts made to place employees on site, manufacture equipment, etc. Includes outdoor activities like walking tours, surf lessons, hula lessons, kayak rental, etc. If you provide transportation to the activity, you may not claim credit for zero carbon.</i>
Are all areas which are air conditioned behind closed doors?				<i>Cooled air is not allowed to freely escape into the outdoors</i>
Do you take ongoing steps to reduce solid waste?				
Have you eliminated or reduced single use amenities in guest rooms?				<i>Hotels only</i>
Do you have a food waste program to minimize loss?				<i>This can be a commercial program like Aloha Harvest, or an in house program such as portion control to limit plate waste.</i>
Is your menu seasonal based on availability of fresh ingredients?				
Do You participate in a composting program?				
Do you have an IPM (Integrated Pest Management) program in place?				<i>Normally applies to only hotel, marine, and food service, but take credit if it applies to your business regardless of its mission</i>
Are employees trained not to pass litter without picking it up?				
Are outdoor garbage receptacles covered or in wind proof containers?				
Do you provide ashtrays in designated smoking areas or prohibit smoking altogether?				
Do you take active steps to limit light pollution from your property?				
Do you reduce noise from your business so that it can not routinely be heard more than 300' away from your property?				<i>Road noise for cars/vans/buses is generally not heard at this distance unless the vehicle is significantly altered. Cultural performances are also excluded if the performance is not continuous for more than 20 minutes. Multiple songs with breaks are acceptable.</i>
Does your company's written ethics policy include environmental issues?				<i>Can include any relevant issues: wildlife, efficiency, carbon, waste, etc.</i>
Does your organization donate to charities specifically focused on environmental causes like wildlife protection, climate change, clean water, etc?				
Does your organization donate unneeded or used materials (uniforms, amenities, office equipment, etc) to charity for reuse?				<i>Excludes donations of your product or experience.</i>
Do you participate in a carbon offset program not funded via an opt-in by guests/customers?				
Do you have designated bicycle parking?				
Do you offer information on alternative transportation options to your guests?				<i>Example: advising guests on bike rental, public transit, and other climate friendly options.</i>

Do you use alternate fuel vehicles in your fleet?				<i>Can include electric vehicles, plug-in hybrid electric, sails, bicycles, etc. Can also include vehicles powered by alternative fuel mixes like biodiesel and SAF, but excluding gasoline mixed with less than 25% ethanol</i>
Do you have a fleet transition strategy to acquire alternative fuel vehicles as existing vehicles are retired?				<i>Take credit if your fleet is already 100% alternative fuel powered</i>
Can at least 33% of your employees commute during non-peak times?				<i>Work From Home Employees may be credited regardless of their shift times if they are WFH for 1 or more days per week.</i>
Do you offer public charging for electric vehicles on property?				<i>Can include electric cars or electric bicycles</i>
Have you ever conducted a waste audit?				
Have you ever conducted an energy audit?				

Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.

Community Responsibility

This category focuses on being a responsible member of a community. It covers caring for workers, environment, ethics, transparency, responsiveness, and other matters related to supporting the land and people of Hawai'i. Strong businesses create strong communities.

Item	Response			Notes
	Yes	No	N/A	
Do you have a formal policy to reduce the impact of your business on shared public resources?				<i>This can include things like keeping group sizes under 12, cooperating with government agencies to support their missions, and leaving no trace of your visits.</i>
Do you have a written policy on sourcing materials which focuses on selecting local businesses first?				
Do you track your local spend to determine your percentage of locally sourced products?				
Do you provide signage or other educational materials to inform your guests of locally sourced products?				<i>Not restricted to just food service, can be retail or any other products they encounter.</i>
Do you have a written ethics policy?				
Do you take direct charitable donation requests from the community?				<i>This includes things like in-kind donations for schools, clubs, and other hyper-local donations not affiliated with organized charities</i>
Are new employees formally trained on your ethics policy?				
Do your employees have training to recognize and report human trafficking?				<i>Applies to transportation and accommodations, but take credit if you provide this training in other sectors as well</i>
Do you have a program to donate surplus food?				
Do your menus offer calorie information?				
Is your company at least 50% owned by full time residents of Hawai'i?				
Is your company 100% owned by full time residents of Hawai'i?				<i>Tick yes to the previous question as well.</i>
Do you offer kama'aina discounts?				
Are you, or do you specifically visit or recommend locally owned small businesses to your guests?				
Do you belong to and actively participate in at least one trade organization or association?				
Do you have an ongoing relationship with at least one local charity?				
Do you sponsor any community events or sports teams?				
Does your retail section contain locally sourced products?				

Do you participate in any third party certification programs for CSR or Ethics?				<i>Third Party Environment or Health Certifications will be addressed elsewhere and shouldn't be claimed here.</i>
Do you have a five year written business plan?				
Do you monitor the business practices of your suppliers to confirm they are acting ethically and responsibly?				
Do you make efforts to encourage young people to join the visitor industry, regardless of whether that encouragement is or is not related to specific job openings?				Examples include career fairs at high schools and colleges, bring your kid to work days, etc.
Do you provide transit passes or other incentives to employees to not commute by single driver cars?				
Do you have designated secure bicycle parking?				
Do you make regular efforts to control litter from your business and customers?				
Do representatives of the company regularly attend community group meetings on behalf of the company?				
Are you a registered B-Corp?				

Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.

Equity

This category focuses on workforce development and the human dignity of our guests, workers, and community. Well trained, diverse, secure, healthy workers create strong businesses, lower turnover, stable communities, and superior guest experiences.

Item	Response			Notes
	Yes	No	N/A	
	What is the hourly wage of your lowest paid Staff Member in Hawai'i?	\$		
Does your highest paid employee make less than 40x the answer to the previous question?				Salary+Bonus+Options. Do not include other compensation. You may answer N/A without penalty if you prefer not to divulge this information. For reference, 40x a \$15.50/hr wage is \$1,289,000 annually
Do you have procedures in place to recruit disadvantaged and minority applicants to apply for jobs in your organization?				<p>"Minority" refers to groups protected under federal and state labor laws, based on race, color, religion, sex, gender identity, ethnicity, national origin, age, disability, and genetic information</p> <p>"Disadvantaged" refers to the SBA definitions of disadvantaged groups and includes Indigenous Hawaiians. Follow this link for an easy to understand definition:</p> <p>https://www.law.cornell.edu/cfr/text/13/124.103#:~:text=%C2%A7%20124.103%20Who%20is%20socially,regard%20to%20their%20individual%20qualities.</p>
Do you have outreach programs to encourage gender diverse hiring?				
Do you have outreach programs to encourage ethnically diverse hiring?				
Do you practice or participate in any programs to bring released felons, houseless, or other marginalized populations into the workforce?				"Practice" applies only to businesses under 25 employees without formal hiring guidelines.

Do you bring young and inexperienced workers into your company through internships, training partnerships, or other official means?				<i>This can include hiring workers without previous experience, even if it's not through a formal program.</i>
Do you actively encourage veterans of military or public service to join your company?				<i>Public service can include Peace Corp, Americorps, Teach for America, and other similar programs. "Active encouragement" includes partnering with placement organizations, using job boards specific to veterans, etc.</i>
Do you actively encourage workers who identify as disabled or neurodiverse to join your company?				<i>"Active encouragement" includes partnering with placement organizations, using job boards specific to these groups, etc.</i>
Do you post salary ranges for your open job listings in Hawai'i?				
Do you offer flexible schedules to parents and caregivers?				
Are employees specifically trained that it is your policy to welcome all guests, regardless of age, gender, appearance, religion, sexuality, ethnicity, or other distinguishing characteristics?				
Are employees offered formal educational opportunities to advance their careers internally?				
Has more than 33% of your supervisory and management team been promoted from within the company?				
Has more than 66% of your supervisory and management team been promoted from within the company?				<i>Cumulative Scoring. You may also check yes for the previous question.</i>
Are workers offered education or certification from a third party body?				<i>This could include HACCCP training, advanced DOT licensing, or any professional certification offered through a government, NGO, or private party, free or paid.</i>
Does your hiring process for non-supervisory or management positions consists of no more than two interviews?				<i>Initial phone screens are not included in the total if scheduled for less than 30 minutes.</i>
Does your hiring process prohibit take home projects, one way recorded video interviews, unpaid shifts, or other required uncompensated work for any position?				
Are employees free from mandatory credit checks in your hiring process?				<i>Applies to non-sensitive jobs. Financial roles and other highly sensitive positions are excluded.</i>
Do you allow full time workers time off for volunteer work?				
Do you allow full time workers paid time off for volunteer work?				<i>Minimum total 8 hours per year required for credit. You may claim this credit and the previous question.</i>
Do you provide paid time off for jury duty?				<i>For salaried workers, no deduction in accrued PTO occurs</i>
Are formal salary and performance reviews of individual employees are conducted at least annually?				
Are cost of Living increases are awarded at least annually based on inflation, and are not related to employee performance?				

Are employees required to use any personal assets like their personal phones, laptops, vehicles for work purposes compensated for their use?				
Do you provide paid sick time to all workers?				<i>Minimum 40 hours yearly (FTE pro rated) required for credit. If offered as combined PTO, 80 hours minimum for credit. Must be available after maximum six months on the job</i>
Do you provide paid vacation time for all workers?				<i>Minimum 40 hours yearly (FTE pro rated) required for credit, beginning first year of employment, with accrual available for use no more than six months after start of employment. If offered as combined PTO, a minimum of 80 hours is required for credit.</i>
Do you provide paternity and/or maternity leave in excess of what is required by applicable laws?				<i>"Applicable law" may be Hawai'i Family Leave Act (HFLL) or federal Family Medical Leave Act (FMLA), or neither, depending on the size of your organization.</i>
Do you provide 3 or more days of bereavement leave?				<i>Paid or unpaid</i>
Do you offer full or partial Work From Home Options to eligible employees?				<i>"Eligible" applies to employees whose job does not require their physical presence in the office due to customer contact, equipment, duties, etc.</i>
Are all hourly employees provided formal breaks?				
Are non-management workers free from non-compete clauses?				
Are employees free from mandatory arbitration as a term of their employment?				
Is your turnover rate for all employees is less than 50% annually?				
Is your turnover rate for all employees is less than 20% annually?				
Are more than 50% of your employees full time, year round?				
Are schedules for workers not on fixed hours released at least 10 days in advance?				
Are Vision and Dental Insurance are provided to all f/t employees on a subsidized basis?				
Is subsidized health insurance is provided to regular part time employees?				
Are fewer than 10% of your workers 1099 Contractors?				
Do you offer anti-bullying training to employees?				
Do representatives of the company regularly attend local community group meetings on behalf of the company?				
Do you conduct anonymous employee satisfaction surveys at least annually?				

Do you host social events for your team outside of work at least once each quarter?				
Can employees monitor schedules, view payroll information, etc. without home internet access?				<i>If information isn't available in hard copy, access to computers for all staff is the acceptable alternate.</i>
Do you offer fee-free payroll options not requiring direct deposit?				<i>Payment by check is acceptable.</i>
Do you materially reward individual employees for providing quality service?				<i>Can include secret shoppers, customer reviews or comment cards, or other formal methods of obtaining feedback</i>
Are all employees offered bonuses, profit sharing, or stock options based on company performance?				<i>Applies only to monetary or securities compensation. Events do not qualify.</i>

Feel Free to list up to two additional efforts you are making in this category which you believe we missed and should be considered. Each item will be evaluated individually.

7b.1

Technical Needs Assessment

TURNING THE TIDE

VISITOR INDUSTRY NEEDS ASSESSMENT





What a regenerative future looks like:

- **Thriving ecosystems**
- **Economic benefits** to the broader community
- **Circular economy** where money stays in Hawai'i
- Decisions in the industry are **driven by the needs of the local community**
- Investment in land, housing, and people
- **Authentic interactions** and reciprocal relationship between kama'āina and malihini
- Educated visitors who **engage with and give back to the local community**
- Mindful visitors who leave Hawai'i with a **better understanding of Hawaiian culture**
- Mindful travelers that **develop a relationship with Hawai'i**, buy local after they leave, and come back
- Robust volunteering and engagement with **local events and organizations**
- **Economic diversification**
- **Stronger food systems**

KEY RESEARCH QUESTIONS



- **How can we better understand the Hawai‘i businesses and community organizations** currently participating in or interested in participating in the visitor industry?
- **What barriers do businesses and organizations face in accomplishing their goals** within the visitor industry?
- **What resources or support would help** to address identified barriers?
- **How do Hawai‘i businesses and organizations currently engage** with the regenerative tourism goals and opportunities?
- What do Hawai‘i businesses and organizations see as **essential goals and opportunities in moving the visitor industry towards a regenerative model?**

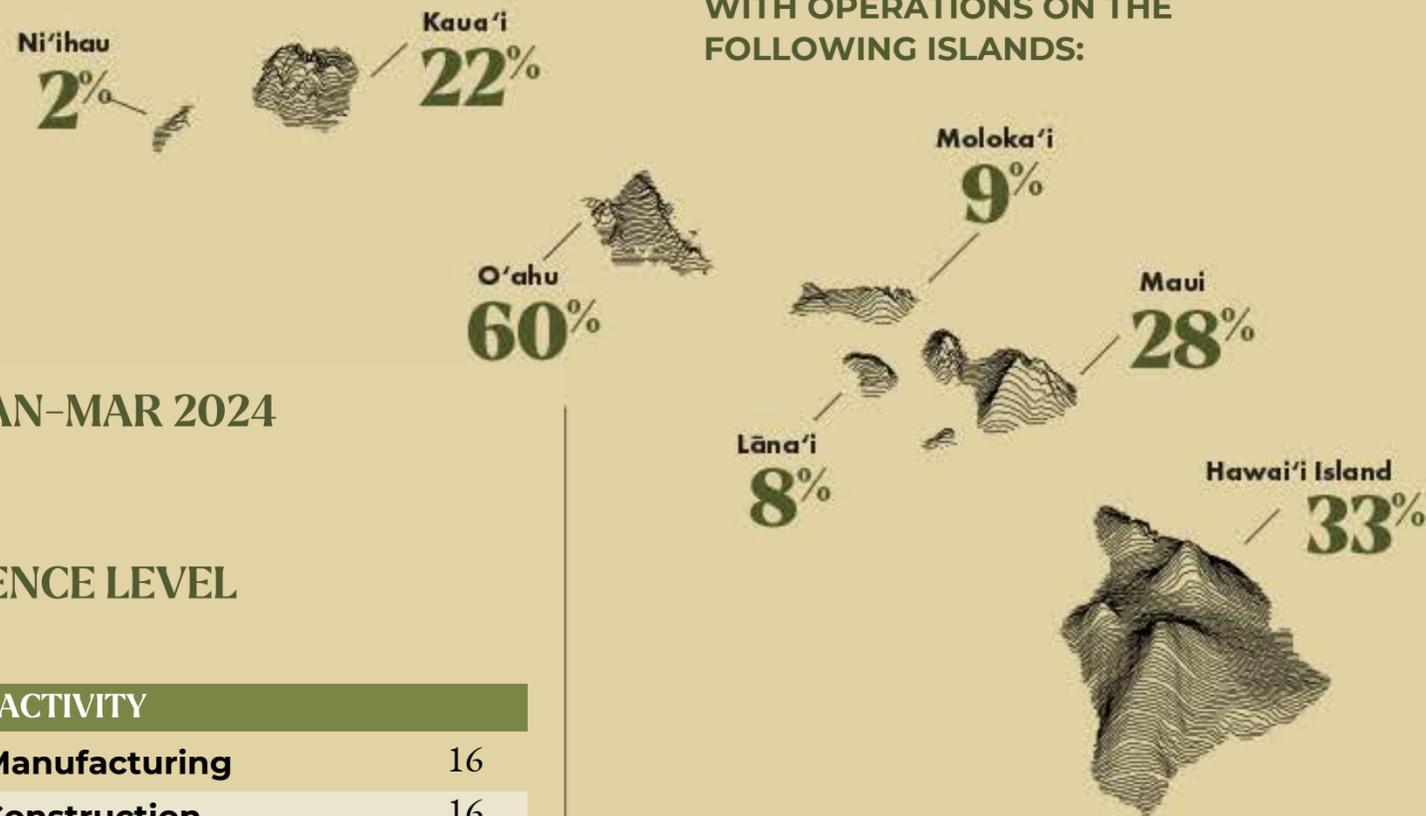
QUANTITATIVE RESPONDENT PROFILE

N = 921

FIELD: JAN-MAR 2024

MARGIN OF ERROR
+/- 3.19

95%
CONFIDENCE LEVEL

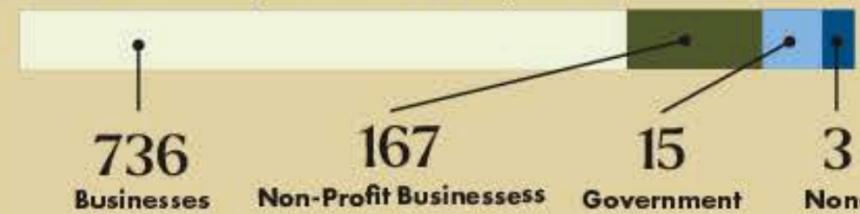


PRIMARY BUSINESS ACTIVITY			
Health Care & Social Assistance	79	Manufacturing	16
Agriculture	58	Construction	16
Small Retail	55	Env/Env Consulting	15
Arts & Culture	54	Industrial	14
Education	54	Event Organizer	14
Tour or Travel Agent/Dest Mgmt	41	Financial	11
Hotel or Resort	39	Tourism/Economic Dev	9
Mgmt Consulting/Consulting	37	Golf Course/Rec Facility	8
Short-term Vacation Rental	37	Info/Broadcasting	7
Tour/Charter	30	Tech/Website	7
Personal Services	26	Wholesaler	5
Restaurant/Food Services	22	Communications	5
Transportation	20	Large Retail	2
Visitor Destinations	19	Other	20
Real Estate	16	Total	736

Respondants Self-Reported As:



With The Following Breakdown of Respondants



QUALITATIVE RESPONDENT PROFILE

N = 92

FIELD: FEB-APR 2024

32

TRADE ASSOCIATIONS

INTERVIEWS: FEB-APR 2024

INTERVIEWERS





THANK YOU FOR ASKING AND INCLUDING SMALL
LOCAL BUSINESSES IN CREATING A CONCERTED
EFFORT TO SHOW HOW WE TRY TO LIVE PONO.

FOUNDATIONAL TECHNICAL ASSISTANCE

TOP 3

Identifying barriers in visitor industry

1 Challenges w/ government agencies or regulations

2 Capital/funding

3 Lack of workers

TOP 3

Support for addressing barriers

1 Increased marketing opportunities

2 Increased connectivity to visitor industry

3 Addressing legal or regulatory barriers

SMALL BUSINESS "HIGH PRIORITIES" FOR BUSINESS/TOURISM TRAINING





Program Recommendations

- Focus on **increasing connectivity between local businesses and visitors** to broaden and increase the reach of each business and organization and accrue economic benefits to Hawai'i
- Curriculum content should prioritize providing businesses and organizations with **marketing opportunities and connectivity to and within the visitor industry**
- Curriculum development can include support with **workforce capacity and regulatory challenges**
- **Facilitate opportunities** for local businesses to engage with other local businesses in **Hawai'i's circular economy** - supply chain, marketing, promotion



“TOURISM CAN SERVE AS AN
ENGINE FOR DIVERSIFICATION”

TOP 3

Identifying barriers in visitor industry

1 Lack of workers

2 Capital/funding

3 Infrastructure

TOP 3

Support for addressing barriers

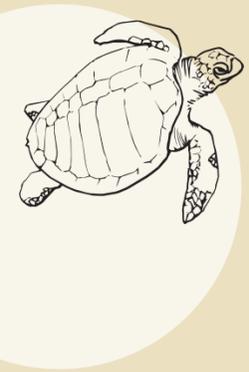
1 More staff capacity

2 More interest among visitors

3 Stronger overall volunteering messaging

BUSINESS/TOURISM TRAINING "HIGH PRIORITIES"





Program Recommendations

- Program design and content should **tailor programs to the unique aspects** of each organization and the hotspot they are stewarding
- Curriculum content should **focus on identified training priorities** including: writing grants to apply for funding, culturally appropriate enterprises and activities, cultural awareness/etiquette guide/training, and digital and online presence/marketing.
- Curriculum content should also center around **supports needed** including: increased marketing opportunities, increased connectivity to the visitor industry, access to transportation services, etc.
- Program component can look towards **mentorship aspects** and may include **partnering with other community stewards** to help in navigating challenges with government agencies, industry stakeholders, and developing pathways to success



“IN 50 YEARS, I WOULD HOPE THAT OUR SCHOOL CHILDREN ARE HEALTHIER AND ARE EATING FARM TO SCHOOL MEALS. OUR AHUPUA'A IS RESTORED WITH MORE NATIVE PLANTINGS. OUR COMMUNITY VALUE AND CONSUME LOCAL CROPS.”

TOP 3

Identifying barriers in visitor industry

- 1 Challenges w/ government agencies or regulations
- 2 Capital/funding
- 3 Lack of workers

TOP 3

Support for addressing barriers

- 1 More staff capacity
- 2 Increased connectivity to visitor industry
- 3 Increased marketing opportunities

BUSINESS/TOURISM TRAINING "HIGH PRIORITIES"

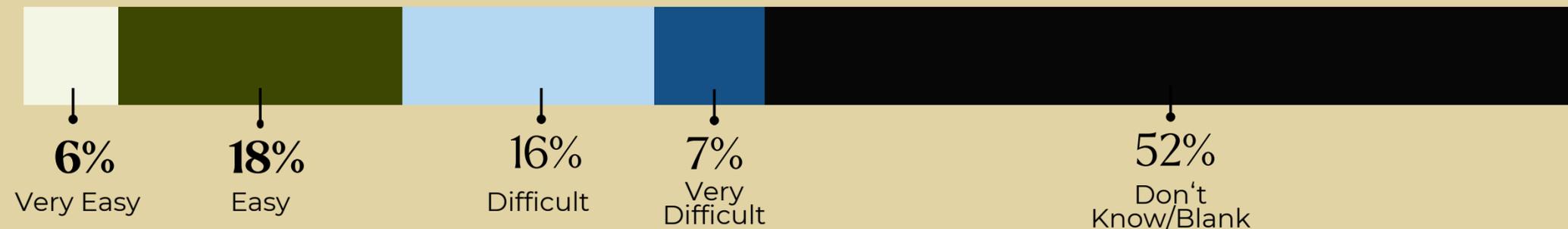




Program Recommendations

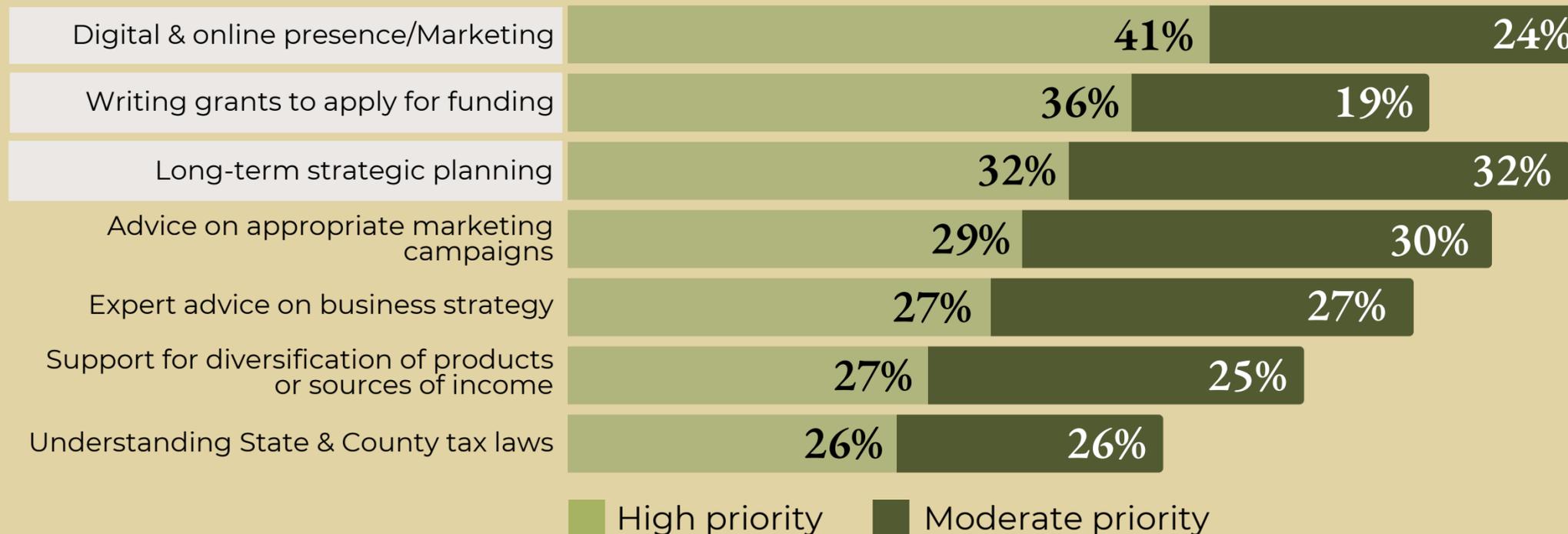
- Curriculum content should prioritize **increased marketing opportunities** and an **increased connectivity to the visitor industry** to address barriers for these businesses and organizations
- Curriculum content should focus around the **priorities of those interested in providing regenerative experiences** including: digital and online presence/marketing, cultural awareness/etiquette guide/training, culturally appropriate enterprises and activities, and writing grants to apply for funding.
- Consider including businesses and organizations that are **currently operating experiences** to teach them best practices **to becoming more regenerative** by either changing their business model, components of their operations, or by identifying best practices that they can employ

ONLY **24%** FOUND IT EASY TO FIND TRAINING OPPORTUNITIES IN THE INDUSTRY



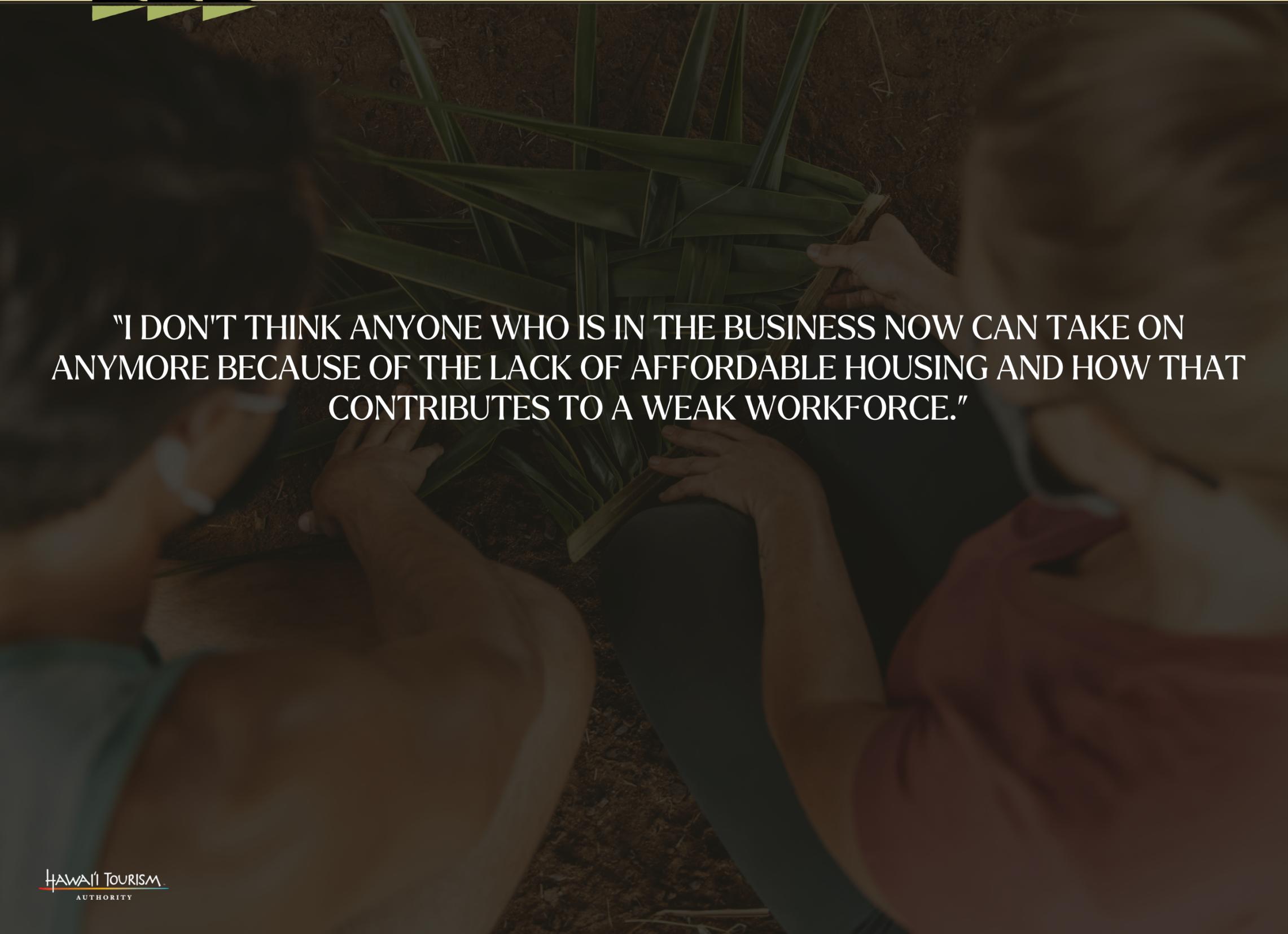
TRAINING PRIORITIES

Light green in bar graph key, indicating high priority



KEY TAKEAWAYS

- Focus on the development of **glide paths into leadership positions** throughout the industry
- Work with industry employers to **hire local talent** instead of hiring from abroad
- Investing in **affordable housing, education, and liveable wages** to support the workforce being able to stay in Hawai'i
- Consider **collaborative tourism training efforts** that can leverage the knowledge base of partners and stakeholders within the industry



"I DON'T THINK ANYONE WHO IS IN THE BUSINESS NOW CAN TAKE ON ANYMORE BECAUSE OF THE LACK OF AFFORDABLE HOUSING AND HOW THAT CONTRIBUTES TO A WEAK WORKFORCE."

KEY TAKEAWAYS

- Invest in **affordable housing, education,** and **liveable wages** to support the workforce in being able to stay in Hawai'i.
- **Work with communities to identify challenges,** where the industry can be a partner to help address.
- **Support coordination** among agencies, industry stakeholders, local businesses, and community organizations.
- **Develop KPI** that measure regenerative goals around food security, natural resources, emissions, and housing.

INCREASED MARKETING OPPORTUNITIES

OUT OF THOSE FACING BARRIERS TO INCREASING SALES TO VISITORS...

57% request increased marketing opportunities

48% request increased connectivity to visitor industry

OUT OF THOSE FACING BARRIERS TO OFFERING REGENERATIVE EXPERIENCES

33% request increased marketing opportunities

34% request increased connectivity to visitor industry

KEY TAKEAWAYS

- Focus marketing efforts on opportunities that **support outreach to travelers that align to Hawai'i's goals** - identifying and pursuing opportunities that focus on mindful and repeat travelers that connect to the regenerative model (examples mentioned include: sports, mindful, LGBTQIA+, conferences, destination weddings, and honeymoons)
- Support the **development of destinations** through coordination, advocacy, branding, and marketing activities for unique destinations that create demand within sub-markets
- Consider **“post-travel” marketing engagement** that helps to **support repeat travel** through ongoing relationship development and increased marketing of Hawai'i-made products and services



Overwhelmingly, survey respondents and interviewees expressed an **excitement in being engaged by HTA in this research**. The ideas were bountiful, and the **commitment to a shared regenerative future** was apparent. While individual ideas, challenges, and opportunities vary, there is no doubt that many businesses, organizations, communities, and residents see HTA's commitment to regenerative tourism as an opportunity to **shift the future of the visitor industry towards one driven by the people and the needs of Hawai'i**. Many are engaged in the work, and they are excited **partners in the mission ahead**.

MAHALO TO THE FOLLOWING FOR MAKING THIS STUDY POSSIBLE:

- HAWAII TOURISM AUTHORITY
- KILOHANA
- WARD RESEARCH & SOLUTIONS PACIFIC
- PARTICIPATING BUSINESSES & ORGANIZATIONS



7b.2

Needs Assessment Highlights

VISITOR INDUSTRY NEEDS ASSESSMENT REPORT

Turning The Tide



REGENERATIVE TOURISM
for HAWAII'S FUTURE

HAWAII TOURISM

AUTHORITY

prepared by

KILO
HANA



WARD RESEARCH



SOLUTIONS
PACIFIC

Introduction

What a regenerative future looks like:

RESPONDENTS ANSWERED:

- > Thriving ecosystems
- > Economic benefits to the broader community
- > Circular economy where money stays in Hawai'i
- > Decisions in the industry are driven by the needs of the local community
- > Investment in land, housing, and people
- > Authentic interactions and reciprocal relationship between kama'āina and malihini
- > Conscientious visitors who engage with and give back to the local community
- > Mindful visitors who leave Hawai'i with a better understanding of Hawaiian culture
- > Mindful travelers that develop a relationships with Hawai'i, buy local after they leave, and come back
- > Robust volunteering and engagement with local events and organizations
- > Enable economic diversification
- > Support stronger food systems



Hawai'i's visitor industry has a tremendous imprint - on our natural resources, our daily lives, our culture;

and as a significant economic driver. Turning the Tide is a summary and highlights document from a 2024 study exploring the needs and opportunities of the businesses and community organizations currently operating in the visitor industry, as well as those who want to do so in the future. These operators include those working to provide services and goods to visitors, support other businesses, steward the natural resources that make Hawai'i special, nurture the cultural richness of our communities, and create resilient, sustainable ecosystems and economies.

The Visitor Industry Needs Assessment is a building block to creating a regenerative visitor industry rooted in the needs of Hawai'i's people, communities, organizations, culture, and natural resources. Identified key areas include:

- Developing technical assistance programs to serve the needs and opportunities of businesses and organizations;
- Supporting the marketing, collaboration, and workforce goals that are integral to success;
- Investing in systemic changes that create environments for regenerative goals to thrive.

We hope that Turning the Tide uplifts and amplifies the voices of small businesses and community organizations to guide stakeholders, inform decision makers, and provide Hawai'i the opportunity to start conversations that will transform the visitor industry today, tomorrow, and for the future generations of Hawai'i residents.

The Visitor Industry Needs Assessment was conducted to guide the Hawai'i Tourism Authority (HTA), its partners, and stakeholders in identifying support needs across Hawai'i's visitor industry. This report lays the groundwork for creating targeted capacity building programs, aligned with regenerative tourism goals to help entities address and overcome adoption barriers.

The data and analysis in this study will support the foundation for building the path towards a regenerative model. It has direct alignment with the HTA 2020-2025 Strategic Plan and its four pillars, the Destination Management Action Plans (DMAPs) for each of Hawai'i's counties, and the 'Āina Aloha Economic Futures ('ĀAEF).

Survey respondents and interviewees overwhelmingly expressed excitement about engaging with HTA's research. There was an abundance of ideas and a clear commitment to a regenerative future. Despite varying perspectives, it's evident that businesses, organizations, communities, and residents view HTA's focus on regenerative tourism as a pivotal opportunity to steer the visitor industry towards being more aligned with the needs and values of Hawai'i. Many are already active contributors, eager to partner in this forward-moving mission.

This study included a quantitative survey instrument sent to businesses and organizations operating in and wanting to operate in the visitor industry and a qualitative interview instrument of key informants throughout Hawai'i pae 'āina. Respondents from across Hawai'i and a wide range of industry segments contributed to the study.

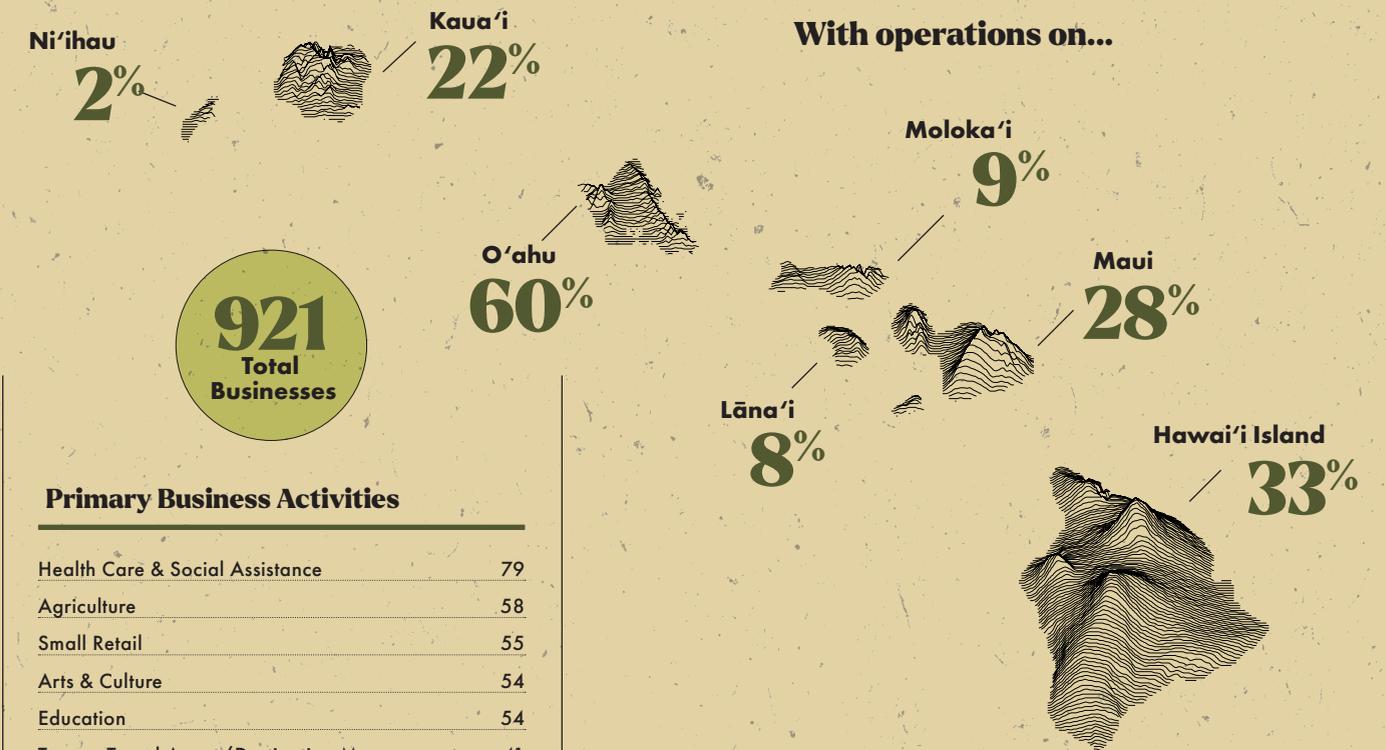
Fielding from January 2024 through March 2024, the survey attracted 921 businesses and non-profit organizations through mail, email, and phone. Each responded to an in-depth survey with a +/- 3.1% margin of error at a 95% confidence rate. Of the 921 business and organization respondents, 63% (581) indicated that they are currently involved in the visitor industry with 9% indicating that they are not but would like to get involved. This larger number of completions than similar business surveys was done to allow for greater analysis of subsegments.

92 key informant interviews were completed to provide in-depth explanations and insights. Leaders and representatives of those in the industry that would be most likely to need capacity-building opportunities were interviewed from February 2024 to April 2024. These included representative from trade associations, visitor industry businesses, and non-profit organizations or community-based organizations.

Key Research Questions :

- How can we gain insights into Hawai'i businesses and community organizations' involvement or interest in the tourism sector?
- What obstacles do these entities encounter in achieving their objectives within the visitor industry?
- What kind of support could overcome these hurdles?
- How are Hawai'i's businesses and organizations aligning with regenerative tourism initiatives?
- What are perceived as critical goals and opportunities for steering the visitor industry toward a regenerative model?

Quantitative Respondent Profile



Primary Business Activities

Health Care & Social Assistance	79
Agriculture	58
Small Retail	55
Arts & Culture	54
Education	54
Tour or Travel Agent/Destination Management	41
Hotel or Resort	39
Management Consulting	37
Short-Term Vacation Rental	37
Tour/Charter	30
Personal Services	26
Restaurant/Food Services	22
Transportation	20
Visitor Destinations	19
Real Estate	16
Manufacturing	16
Construction	16
Environmental Consulting	15
Industrial	14
Event Organizer	14
Financial	11
Tourism/Economic Development	9
Golf Course/Recreational-Facility	8
Info/Broadcasting	7
Tech/Website	7
Wholesaler	5
Communications	5
Large Retail	2

Respondents Self-Reported As:



With The Following Breakdown of Respondents



“Thank you for asking and including small, local businesses in creating a concerted effort to show how we can try to live pono.”

Spotlight on Regenerative Tourism

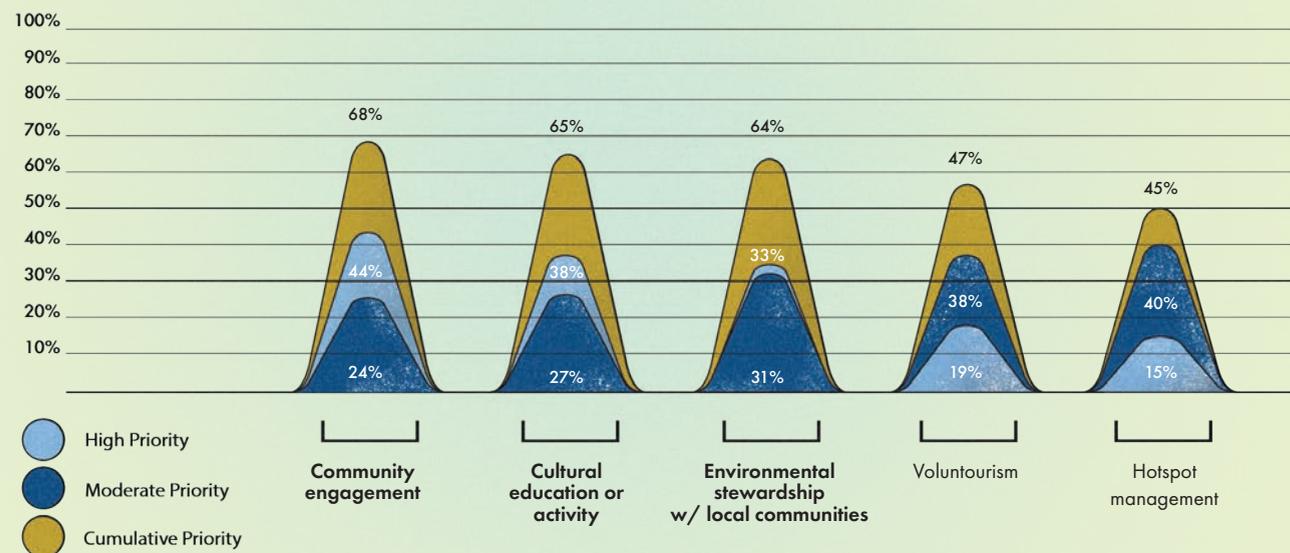
Regenerative tourism includes elements like sustainable tourism, eco-tourism, voluntourism, cultural tourism, agritourism, and empowering local businesses.

Regenerative tourism takes sustainability one step further by focusing on the net benefit of the industry to a destination's communities and cultures.

Businesses and organizations both already engaged and wanting to engage in the visitor industry are interested in offering regenerative and voluntourism experiences.



Currently Engaged in the Visitor Industry and Interested in Regenerative Tourism Activities



Respondents expressed current involvement as well as strong interest in **community engagement**, **cultural education or activity**, and **environmental stewardship**.

Greater communication with public agencies (base=119) was cited as a way to support organizations in navigating challenges such as permitting restrictions, the inability to utilize land for regenerative activities, or a lack of understanding around frequently changing rules. A number of participants and interviews discussed the desire to work with agencies to develop regenerative activities and the challenges of navigating restrictions.

Voluntourism

Voluntourism, an integral aspect of the regenerative tourism model, represents only 2.8%, on average, of the activities that visitors participate in (according to the 2023 Q4 Visitor Satisfaction & Activity Study) with most visitors unaware of volunteer or give-back opportunities while traveling. Current operators suggested pivoting Hawai'i's marketing efforts to untapped market segments including: mindful travelers, travelers seeking richer travel experiences, the LGBTQIA+ travel market, etc.

Of the total sample (n=921) 57% (530) expressed interest in voluntourism. 19% (177) respondents are currently offering voluntourism experiences and 38% (353) expressed interest in starting.

Examples of barriers and limitations to offering voluntourism experiences cited were:

- **Lack of workers**
- **Capital/funding**
- **Lack of marketing/connecting**

Agritourism

Of the total sample (n=921) 53% (484) expressed interest in agritourism. 17% (155) respondents are currently offering agritourism experiences and 36% (329) expressed interest in starting. Two of the top three remedies to the barriers these organizations face to providing agritourism activities are increased marketing opportunities and increased connectivity to visitors.

All Businesses Offering Regenerative Experiences

Identified barriers to greater participation in the visitor industry

1. Lack of workers
2. Challenges with government agencies and regulations
3. Capital/funding
4. No time/not practical
5. Unfamiliar with what's available
6. Lack of marketing
7. High overhead in Hawai'i
8. Infrastructure issues
9. No market/interest
10. Competition/uncooperative vendors

Support needed to overcome barriers to the visitor industry

1. More staff capacity
2. Increased connectivity to visitor industry
3. Increased marketing opportunities
4. Addressing legal or regulatory barriers
5. Greater communication with public agencies
6. More interest among visitors
7. Updated facilities
8. Mentoring from similar businesses
9. Stronger overall volunteer messaging
10. Transportation services connectivity

Key Takeaways:

- Focus on making decisions that are "driven by the needs of Hawai'i"
- Centralize information on the destination management work being done throughout Hawai'i
- Increase marketing and promotion around regenerative activities/organizations.
- Develop marketing content to feature regenerative activities that are created, directed, produced, and delivered by local businesses and integrate the local community and culture
- Fund and provide training and capacity building for voluntourism opportunities
- Facilitate greater coordination between Hawai'i farms and visitors seeking educational, cultural, and agricultural opportunities
- Coordinate efforts between agencies/entities that provide opportunities to support local businesses
- Focus on untapped market segments that align with the "mindful traveler"

The need for greater workforce capacity was consistently identified as a barrier to local businesses operating within the visitor industry, as well as to those currently outside the industry that offer or aspire to offer regenerative tourism experiences. From small businesses to larger industry corporations, interviewees across the board expressed the importance of hiring, cultivating, and retaining local talent. Many stated that their goal is to retain their employees long-term and to see them advance in their careers. The industry also recognizes the value in developing and supporting programs that train local artists and enhance career pipelines to keep creative talent here in Hawai'i nei.

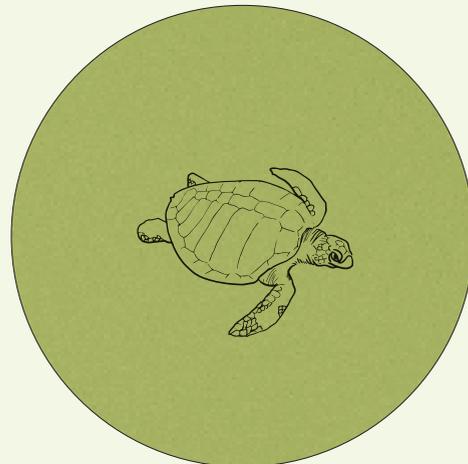
52%

Only 24% of organizations who are currently involved or are interested in being involved in the visitor industry found it easy to find tourism training opportunities with 52% of respondents not knowing how to find them.

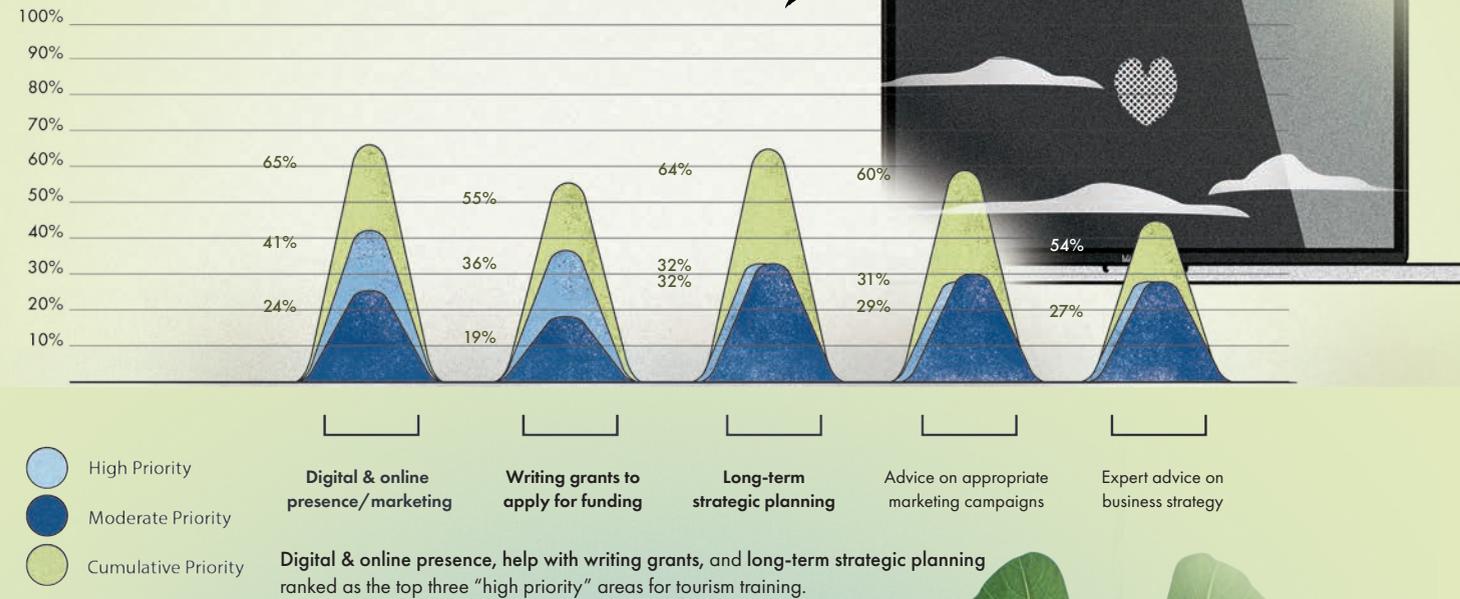
18%

Only 18% of respondents have received specific tourism training or assistance in the past 5 years.

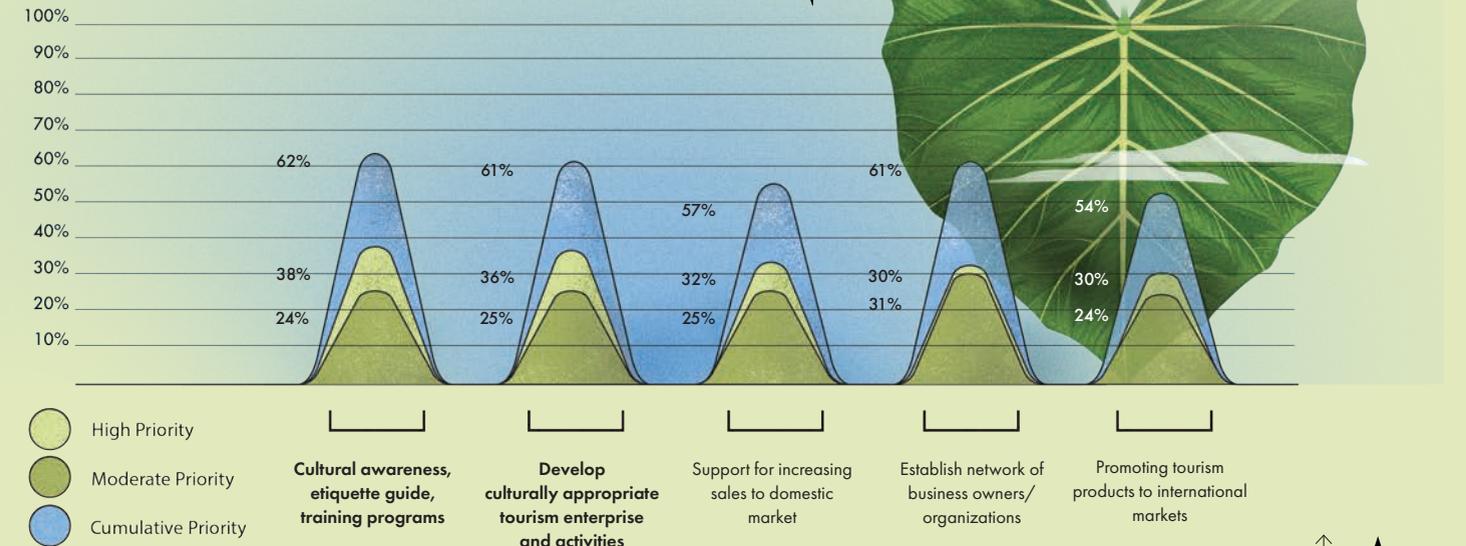
“We need more staff capacity to handle the interest in our voluntourism opportunities. Currently, visitors can volunteer in our conservation nursery. But it requires significant time commitments on everyone’s part to coordinate for ultimately a very brief experience.”



Prioritized Areas for Tourism Training and Assistance

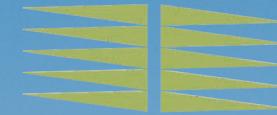


Prioritized Areas for Business Training



Key Takeaways:

- Focus on the development of glide paths into leadership positions throughout the industry
- Work with industry employers to hire local talent instead of hiring from abroad
- Invest in affordable housing, education, and liveable wages to support the workforce being able to stay in Hawai'i
- Consider collaborative tourism training efforts that can leverage the knowledge base of partners and stakeholders within the industry



“There needs to be more engagement for all businesses... how can we get tourists out of Waikīkī and into local communities to share the wealth?”



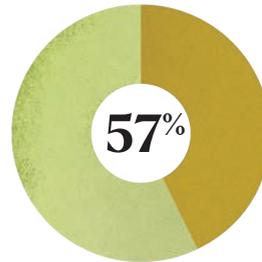
Increased Marketing Opportunities

When asked about the barriers they faced (to enhancing their footprint, offering regenerative experiences, or hosting voluntourism opportunities), many respondents cited the combination of “lack of marketing” and “visitors don’t know about us.” This suggests that an important role for HTA to fulfill is supporting businesses and organizations wanting to offer regenerative experiences with marketing and visibility.

Some identified areas of growth include:

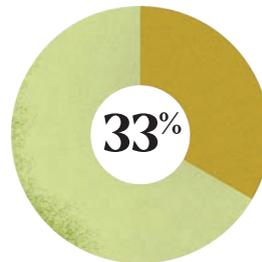
- Targeted marketing to specific groups of travelers more aligned with regenerative activities
- Access to Go Hawaii, regardless of membership status
- Support for brand identity and awareness around destinations
- Social media support
- Increased advertising of voluntourism opportunities
- Tracking and utilizing data to measure success.

...of those facing barriers to increasing sales to visitors:

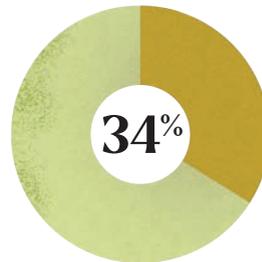
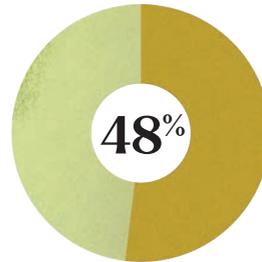


Increased marketing opportunities requested by...

...of those facing barriers to offering regenerative experiences:



Increased connectivity to visitor industry requested by...



“I am a small business that needs help connecting with tourists who are already here. I share local Hawaiian art and awareness through my business and I don’t have a lot of advertising money to connect with the tourist market.”

Increased Connection to the Industry

Increased connectivity was a significant theme, wherein the industry has the potential to leverage its stakeholders and networks to create bridges between agencies, businesses, organizations, sectors, markets, and the community. The opportunity on the horizon is for HTA to lead this initiative with its unique position in the industry and better connect different parts of the industry to one another. Multiple interviewees, for instance, spoke about the need to better connect visitors with the community.

Some other connections mentioned as needing facilitated connections include:

- Kama’āina with malahini
- Local business with visitors
- Local businesses with other industry segments
- Organizations with visitors that want to volunteer
- Organizations that regulate their sector



“Help the small activity provider!!!”

Key Takeaways:

- Focus marketing efforts on outreach to mindful traveler markets that align with Hawai’i’s goals of a more regenerative tourism (e.g., sports; LGBTQIA+ conferences, destination wedding, and honeymoons)
- Support the development of destinations through coordination, advocacy, branding, and marketing activities for unique destinations that create demand within sub-markets
- Consider “post-travel” marketing engagement that helps to support repeat travel through ongoing relationship development and increased marketing of Hawai’i-made products and services

Key Takeaways:

- Leverage HTA’s ability to bring together various stakeholders, fostering connections between agencies, businesses, sectors, and the community
- Enhance collaboration between the visitor industry and local businesses to boost mutual growth
- Promote genuine interactions between residents (kama’āina) and visitors (malihini)
- Create an online hub for resources on regenerative tourism
- Engage kama’āina in regenerative experiences such as voluntourism and agritourism

Spotlight on Systemic Change

Significant systemic issues affect the local workforce, causing local businesses and organizations to have a difficult time hiring and keeping local talent. Interviewees pointed out affordable housing issues and the “brain drain,” or the loss of local talent moving away from Hawai‘i, as some of the largest issues barriers to retaining staff. Investing in local housing, education, and job opportunities is critical to building and maintaining a thriving local workforce both today and in the future.

25%

OF BUSINESSES AND ORGANIZATIONS LISTED REGULATORY CHALLENGES AS A BARRIER TO INCREASING THEIR SALES TO VISITORS

Systemic Barriers

Systemic barriers, such as the local workforce’s lack of affordable housing and capacity needs were among the barriers to offering regenerative activities. Interviewees identified the “brain drain” as skilled locals moving to the continent in search of better-paying jobs and a cheaper cost of living - illustrating the inability to hire and keep local talent.

“We’re always looking to better support a healthy tourism industry in Hawai‘i that supports our local residents and adds investment to our local entrepreneurs and creatives.”

“There is a lack of housing at reasonable pricing for employees. The high costs of housing are passed on to businesses who have to pay more to keep good employees.”

Key Takeaways:

- Invest in affordable housing, education, and livable wages to support the workforce so they can stay in Hawai‘i
- Consider partnerships and other opportunities that can benefit the visitor industry workforce
- Support coordination among agencies, industry stakeholders, local businesses, and community organizations



Spotlight on Maui

98 respondents (11%) are businesses and organizations operating exclusively in Maui.
262 respondents (28%) operate on Maui and elsewhere.

Interviewees elaborated on the need for immediate, permanent, affordable housing for those suffering economic hardship as a result of displacement by the Lahaina wildfires. The housing issue, prevalent before the wildfires, was exacerbated by the devastation in Lahaina.

All Businesses/Organizations on Maui increasing sales to visitors

Identified barriers to greater participation in the visitor industry

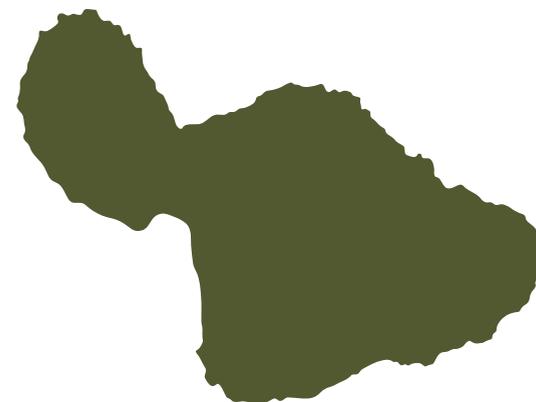
1. Challenges working with government policies
2. Comments related to Maui wildfires
3. Lack of workers

Support needed to overcome barriers to the visitor industry on Maui

1. Increased marketing opportunities
2. Increased connectivity to visitor industry
3. Addressing legal or regulatory barriers



“We advocate for workshops, language lessons, and cultural immersion experiences, with the aim to cultivate a tourism workforce that embodies the spirit of aloha, ensuring visitors have meaningful and respectful experiences of our island’s traditions.”



Key Takeaways:

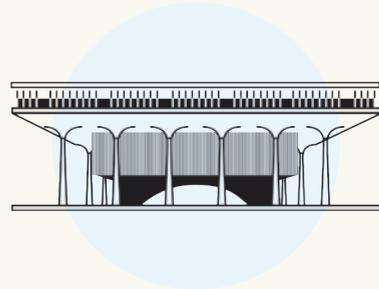
- The people of Maui need support in the ways that their communities prefer. This is critical in the coming years as recovery continues from the wildfires.
- Focus on balancing respectful, appropriate, and managed tourism with cohesive messaging and continued engagement with the Maui communities
- Develop specific marketing opportunities for Maui products, services, businesses, and organizations
- Support long-term sustainability goals for the visitor industry such as affordable housing, career enhancement on-island, food hubs, and more

Foundational Technical Assistance Program

The Foundational Technical Assistance program is needed to build the capacity of locally-owned businesses and non-profit organizations throughout Hawai'i that either want to grow in the visitor industry or want to join the industry.

Small businesses highlighted the need for better marketing strategies and stronger ties to the tourism sector as top priorities. Other significant concerns included labor shortages and issues with government regulations. Implementing programs that address these needs could boost sales to tourists and enhance sustainable tourism across the region.

Small Businesses Offering Regenerative Experiences



Identified barriers to greater participation in the visitor industry

1. Challenges with government agencies or regulations
2. Capital/funding
3. Lack of workers



Support needed to overcome barriers to the visitor industry

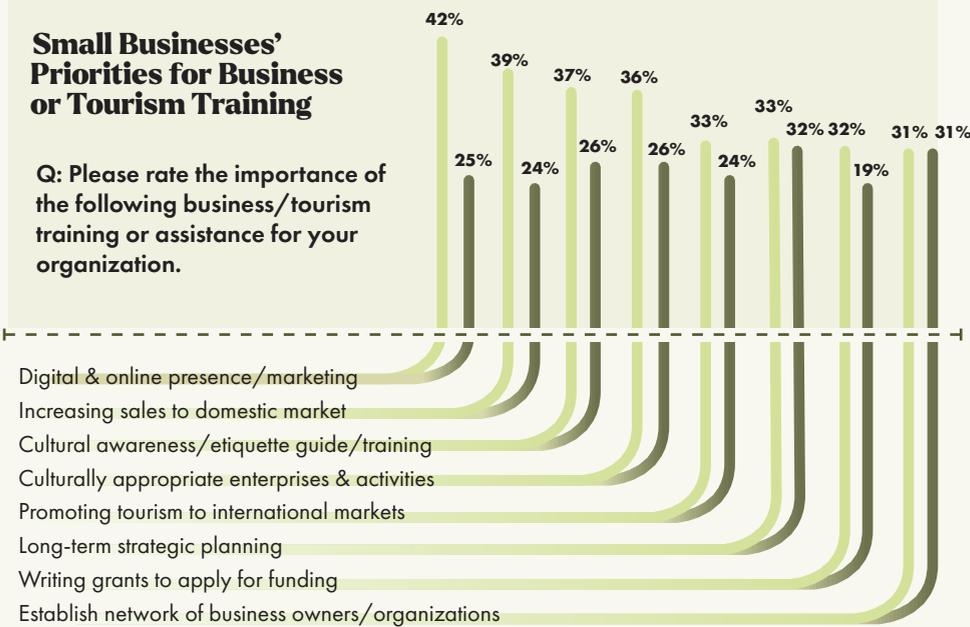
1. Increased marketing opportunities
2. Increased connectivity to visitor industry
3. Addressing legal or regulatory barriers

Lack of marketing capacity was frequently identified as a barrier to local businesses wanting to offer regenerative and voluntourism experiences. Some identified areas of growth included:

- Targeted marketing to specific groups of travelers more aligned with regenerative activities
- Access to Go Hawaii, regardless of membership status
- Support for brand identity and awareness around destinations
- Social media support
- Increased advertising of voluntourism
- Tracking and utilizing data to measure success

Small Businesses' Priorities for Business or Tourism Training

Q: Please rate the importance of the following business/tourism training or assistance for your organization.

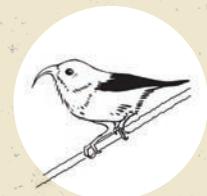


● High priority ● Moderate priority

Small business that face barriers in offering regenerative experiences would like **increased marketing opportunities, increased connectivity to the visitor industry and help with addressing legal or regulatory issues.**

Program Recommendations

- Enhance local business-visitor connectivity to expand each entity's reach
- Focus curriculum content on marketing opportunities and industry connectivity
- Include workforce capacity and regulatory support in curriculum development
- Promote engagement among local businesses within Hawai'i's circular economy, (e.g., supply chain, marketing, promotion)



CTC – Community Stewardship

The Community Stewardship Capacity Building program aims to protect Hawai'i's natural resources for future generations. It balances regenerative goals with impacts of tourism through local solutions tailored to each area's unique challenges.

Community organizations dedicated to stewardship prioritized addressing the need for additional staff, enhanced visitor engagement, and stronger volunteer recruitment - focuses which set them apart from other groups. They emphasize the necessity of infrastructure funding and the need to navigate complex regulations. Among these organizations, those who sold to visitors cited the main obstacle to increasing visitor sales as insufficient marketing, with a call for improved marketing strategies and better connections to the tourism sector. The Community Stewardship Program (CTC) can meet these demands by offering marketing support, especially in digital arenas, as sought by 75% of stewardship nonprofits.

Non-Profit Organizations in Stewardship Offering Regenerative Experiences identified a lack of workers as one of the primary barriers.

Identified barriers to greater participation in the visitor industry

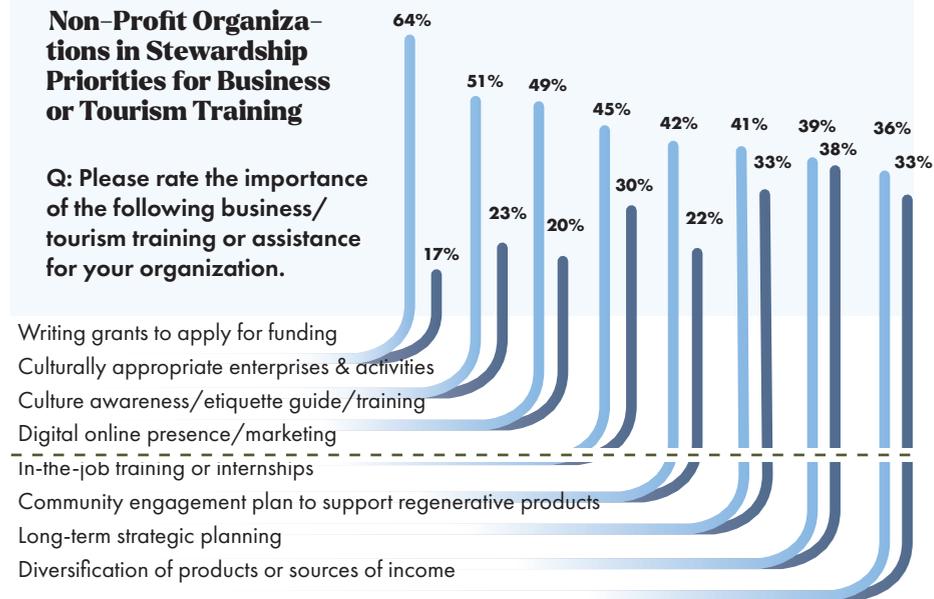
1. Lack of workers
2. Capital/funding
3. Infrastructure

Support needed to overcome barriers to the visitor industry

1. More staff capacity
2. More interest among visitors
3. Stronger overall volunteering messaging

Non-Profit Organizations in Stewardship Priorities for Business or Tourism Training

Q: Please rate the importance of the following business/tourism training or assistance for your organization.



Writing grants to apply for funding
 Culturally appropriate enterprises & activities
 Culture awareness/etiquette guide/training
 Digital online presence/marketing
 In-the-job training or internships
 Community engagement plan to support regenerative products
 Long-term strategic planning
 Diversification of products or sources of income

● High priority ● Moderate priority

Grant writing and cultural appropriateness were the highest priority training areas for non-profit organizations focused on stewardship.



Program Recommendations

- Tailor program design and content to meet the needs of each organization and its stewardship focus
- Emphasize grant writing, culturally relevant enterprises, cultural awareness training, and enhancing online marketing in the program curriculum
- Additionally, topics include expanding marketing opportunities, linking with the visitor industry, and improving access to transportation services
- Incorporate mentorship and partnerships to overcome obstacles with government entities and stakeholders, facilitating successful outcomes

CTC – Regenerative Experiences



The Regenerative Experiences Capacity Building program seeks to ensure that there are more regenerative experiences on the market. These experiences encompass voluntourism, agritourism, buying local, and a variety of other community-driven, culturally-authentic, and environmentally sustainable experiences.

Over 42% of this sub-sector of the industry needs support with being able to add more staff to their businesses and organizations in order to address barriers to offering regenerative experiences. This piece of data illustrates a growing phenomenon within the visitor industry across the pae ‘āina when coupled with the fact that the second highest barrier to growth is a lack of workers.

Many respondents and interviewees noted the importance of supporting local businesses and industries in all areas of the supply chain, most notably when discussing food security and retail shelf space.

Complex challenges with land, supply, demand for non-branded products, and lack of segment connectivity highlighted the opportunity for HTA to convene stakeholders to help address industry-wide challenges and support local supply chains.

Organizations in Regenerative Work Offering Regenerative Experiences

Identified barriers to greater participation in the visitor industry

1. Challenges with government agencies or regulations
2. Lack of workers
3. Capital/funding

Needed support for addressing barriers to the visitor industry

1. More staff capacity
2. Increased connectivity to visitor industry
3. Increased marketing opportunities

Program Recommendations

- Curriculum content should prioritize increased marketing opportunities and an increased connectivity to the visitor industry to address barriers for these businesses and organizations
- Curriculum content should focus around the priorities of those interested in providing regenerative experiences including digital and online presence/marketing, cultural awareness/etiquette guide/training, culturally appropriate enterprises and activities, and writing grants to apply for funding
- Consider including businesses and organizations that are currently operating experiences to teach them best practices to becoming more regenerative by either changing their business model, modifying components of their operations, or identifying best practices that they can employ

About this Report



Mahalo to the many people that helped contribute to this in-depth research. Over 921 of Hawai‘i’s businesses and organizations took the time to provide their input throughout January to March 2024 through a quantitative survey via mail, email, and phone in addition to 92 in-depth key informant interviews in-person and virtually. Acknowledgements as well to the many organizations that helped provide additional insights through in-depth interviews and member engagement to thousands more businesses and organizations in our community. This Highlights Report provides key takeaways from the full report that can be found at hawaiiourismauthority.org/research/.

7GEN Culture
 Access Cruise
 Activities and Attractions Association of Hawai‘i
 Ala Kukui Hāna Retreat
 Alaska Airlines
 Aloha Festivals
 AltruVistas
 Anaina Hou Community Park
 Anelakai Adventures
 Association of Hawaiian Civic Clubs
 Big Island Chocolate Festival
 Big Island Farms
 Big Island Invasive Species Committee (BIISC) -Big Island Resources Conservation and Development Council
 Blue Hawaiian
 Buddah’s Cup
 Camp Pālehua
 Chamber of Commerce Hawai‘i
 Chamber of Commerce Kailua
 Chamber of Commerce Kaua‘i
 Chamber of Commerce Kona-Kohala
 Chamber of Commerce of Hawai‘i Island
 Chamber of Commerce of Honolulu
 Chamber of Sustainable Commerce
 Chamber of Sustainable Commerce O‘ahu
 Chinese Chamber of Commerce
 City and County of Honolulu,
 Office of Economic Revitalization
 ClimbHi
 Council for Native Hawaiian Advancement
 DLNR Department of Land and Natural Resources, Division of Forestry and Wildlife
 Downtown Art Center
 Farm Link
 Four Seasons Resorts Hawai‘i
 General Contractors Association of Hawai‘i
 Growth International Volunteer Excursions
 Hala Tree Coffee

Haleiwa Waialua Historical Society
 Hāmākua Harvest
 Hanafuda Hawaii
 Hanalei Initiative
 Hawai‘i International Film Festival
 Hawai‘i LGBT Legacy Foundation
 Hawai‘i Alliance for Community-Based Economic Development
 Hawai‘i Bicycling League
 Hawai‘i Bowl
 Hawai‘i Food Industry Association
 Hawai‘i Forest Farms LLC
 Hawai‘i Hotel Alliance
 Hawai‘i International Film Festival
 Hawai‘i Island Chamber of Commerce
 Hawai‘i Keiki Museum
 Hawai‘i Land Trust
 Hawaii Ag & Culinary Alliance (dba Hawai‘i Food & Wine Festival)
 Hawaiian Airlines
 Hawaiian Airlines Diamond Head Classic
 Hawaiian International Billfish Tournament
 Hawaiian Music Perpetuation Society
 Hi‘ipaka LLC (Waimea Valley)
 Holo Holo Charters
 Honolulu Botanical Gardens
 Honolulu Theatre for Youth
 Hui Maui Ola
 O Maku‘u ke Kahua Community Center
 Island Art Party
 Island of Hawai‘i Visitors Bureau
 Kāhuli Leo Le‘a
 Ka‘ala Farms
 KA‘EHU
 Kailua Village Business Improvement District
 Kaimana Beach Hotel
 KANU Hawai‘i
 Kaua‘i Office of Economic Development
 Kaua‘i Soto Zen
 Kaua‘i Veterans Council

Kaua‘i Visitor Bureau
 Kaua‘i Visitors Bureau
 Kauai Yoga & Peace Festival
 Kilohana Lū‘au
 Kona Cacao Association, Inc.
 Kona Coffee Cultural Festival
 Kona-Kohala Chamber of Commerce
 Kua āina Ulu ‘Auamo (KUA)
 Kumano i Ke Ala o Makaweli
 Lāna‘i Cat Sanctuary
 Makauwahi Cave Reserve
 Mālama Pūpūkea-Waimea (MPW)
 Mālie Foundation
 Marketing Management, Inc.
 Maui Hotel & Lodging Association
 Maui Nui Marine Resource Council
 Mō‘ili‘ili Festival
 Moloka‘i Homestead Farmers Alliance
 Moloka‘i Land Trust
 National Tropical Botanical Garden
 Native Hawaiian Hospitality Association
 Naupaka Pacific
 Next Level Collaborations
 North Shore Eco Tours
 Office of Economic Revitalization
 Outrigger Duke Kahanamoku Foundation
 Pacific Asia Travel Association (PATA)
 Pearl Harbor National Memorial
 Pōhāhā I Ka Lani
 Pono Pacific/Kuilima Farm
 Protect & Preserve HI
 Regenerative Tourism Program
 Small Business Regulatory Review Board
 Starseed Ranch
 State of Hawai‘i Department of Business, Economic Development, and Tourism
 Sustainable Coastlines Hawai‘i
 Sustainable Tourism Association of Hawai‘i
 The Kaua‘i Chamber
 The Kaua‘i Marathon

This report was commissioned by the Hawai‘i Tourism Authority to gain insights into the needs of Hawai‘i’s local businesses and community-based organizations that are working in the visitor industry or are thinking of working in the visitor industry. The needs assessment especially sought to gain deeper insight into understanding the goals, needs, and opportunities for supporting organizations in engaging with the regenerative work that guides HTA’s mission, including its pillars of: Respect for Our Natural & Cultural Resources, Support Native Hawaiian Culture & Community, Ensure Tourism & Communities Enrich Each Other, and Strengthen Tourism’s Contributions. Mahalo to Kilohana, Ward Research, Solutions Pacific and Daubert Design for their professional support.



HAWAII TOURISM
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