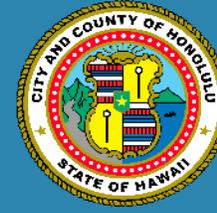




HAWAII TOURISM  
AUTHORITY



# O'ahu Community Presentation

Presentation on O'ahu Destination  
Management Action Plan Process and  
Draft Anchor Actions

May 4 and 5, 2021

# AGENDA



Opening

Orientation

Webinar Agenda and Technology

Presentation #1

HTA & State of Tourism on O'ahu

Q&A on the "Why"

Presentation #2:

Community-Based Steering Committee  
Process & Ideas

Q&A on the "How" and "What"

Polls

Next Steps

Close

# ROLES



## Panelists:

Idea kick-starters,  
Community  
representatives

## Community Attendees:

Seek to understand  
Prepare to offer input

## Moderator:

Keep session on track  
& on time.  
Help field questions

## Graphic Recorder

Help capture key  
content in Q&A



# OUTCOMES

## Overall:

Recommendations to HTA on  
actions that the agency can take  
toward regenerative tourism.

## Today:

### **Info sharing from panelists**

Share:

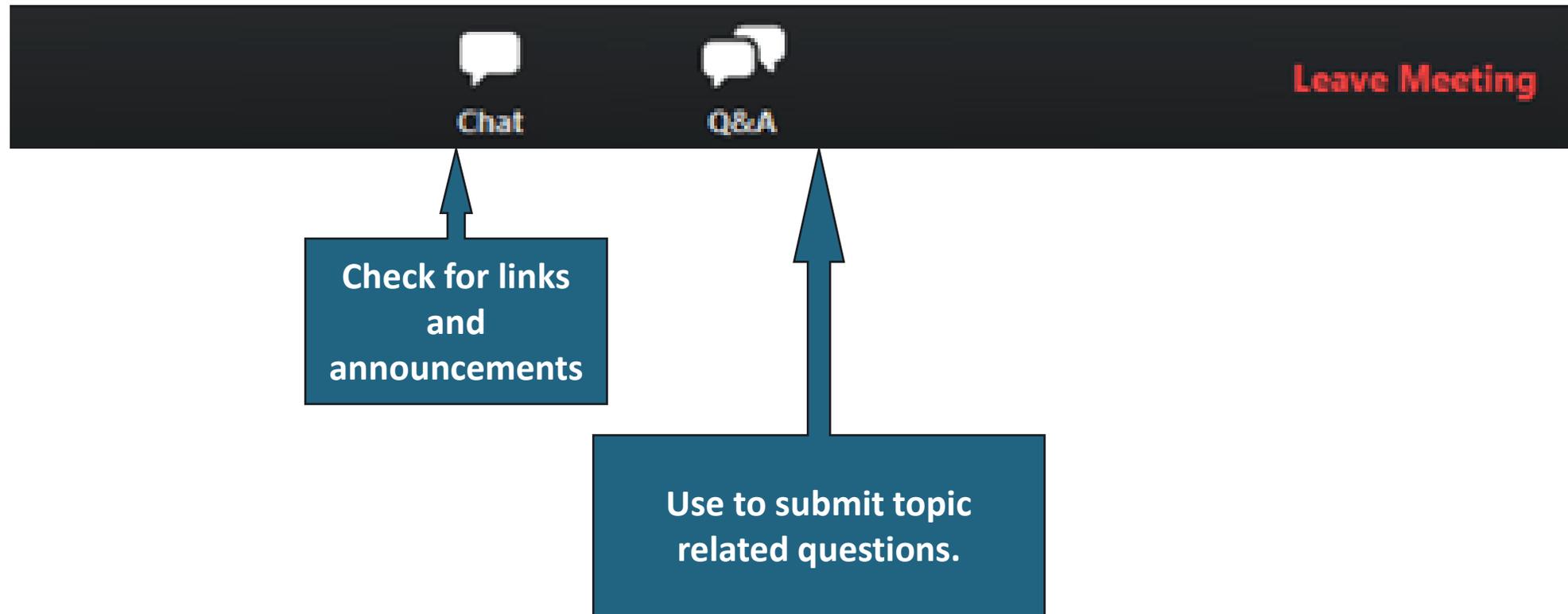
- facts on tourism on O'ahu & HTA's mālama mindset.
- Steering Committee's draft ideas to re-define tourism on O'ahu.

## Today and After:

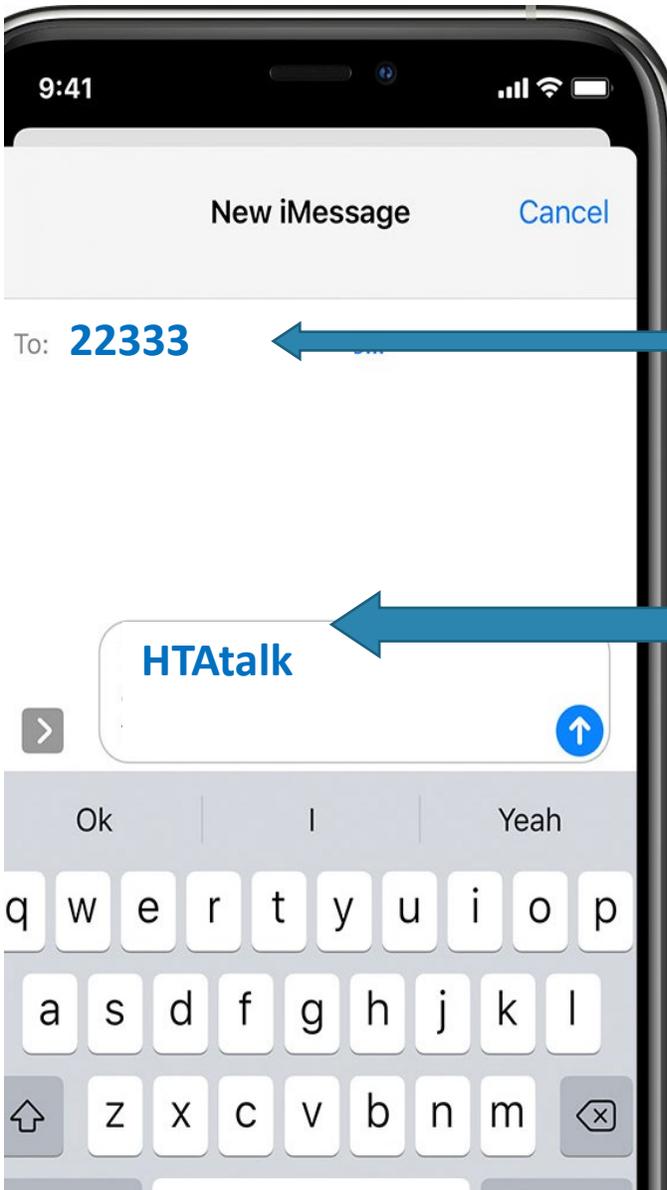
### **Info sharing from attendees**

Provide constructive solution-oriented feedback and ideas for the Steering Committee and HTA to consider in polls (today) and survey (open until mid-May)

# Tech Orientation - Zoom



# Tech Orientation – Poll Everywhere



## Join via text

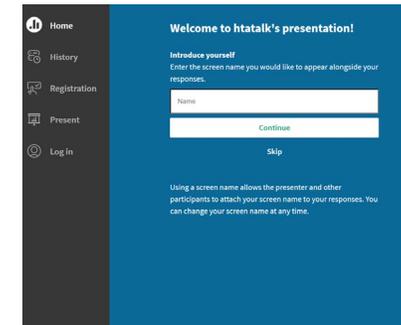
1. TEXT To: 22333

2. Send Message:  
HTAtalk

Wait for confirmation message and prompts then submit poll answers

OR

Join via  
web browser  
[Pollev.com/HTAtalk](http://Pollev.com/HTAtalk)

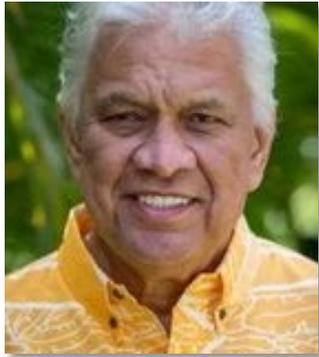


Wait for prompts then submit poll answers

*Once you log in keep open so you don't have to log in again*

**Share 1 word that expresses your thoughts and feelings about tourism on O'ahu**

# Today's Panelists



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



**Keith Regan**  
Hawai'i Tourism Authority  
'Āina Haina, O'ahu



**Pattie Herman**  
Hawai'i Tourism Authority  
Hawai'i Kai, O'ahu



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



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



**Amy Asselbaye**  
C&C of Honolulu  
'Āina Haina, O'ahu



**Noelani Schilling-  
Wheeler**  
O'ahu Visitors Bureau  
Kaimukī, O'ahu



# O'ahu DMAP Steering Committee Members



**Paula Akana**  
'Iolani Palace



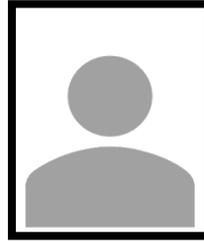
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Makakilo/Kapolei



**Adam Borrello**  
North Shore  
Community Land Trust  
North Shore



**Kevin Chang**  
Community Member  
Kahulu'u



**Walea Constantinou**  
County - Film Office



**Rick Egged**  
Waikiki Improvement  
Association  
Kaka'ako



**Chenoa Farnsworth**  
Blue Startups  
Kaimuki



**Joe Ibarra**  
The Kāhala Hotel  
& Resort  
Mānoa



**Joseph Lapilio**  
Wai'anae Economic  
Development Council  
Wai'anae



**Elissa Lines**  
Pearl Harbor  
Aviation Museum  
Hawai'i Kai



**Robert Masuda**  
State - Dept. of Land &  
Natural Resources



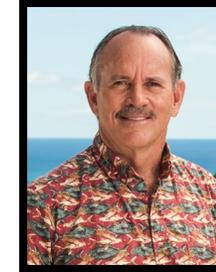
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Na Mea Hawai'i  
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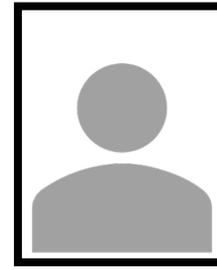
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Pālolo Valley, Kaimuki



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**Laura Thielen**  
County - Dept. of  
Parks & Recreation  
Kailua



**Sunshine Topping**  
Hawai'i Pacific Health  
Wai'alaie Nui



**Ulalia Woodside**  
Nature Conservancy  
of Hawai'i  
Waimānalo

# HTA is committed to Destination Management



## *Destination Management is...*

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

*Source: HTA Strategic Plan 2020-2025*

# HTA's Mission...



*...to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.*

*Regenerative Tourism is mutually beneficial*



## *Strategic Plan 2020-2025*

**Natural  
Resources**

**Hawaiian  
Culture**

**Community**

**Brand  
Marketing**

## *Responsible Tourism*





*mālama*  
KU'U HOME

Caring for My Beloved Home



Waikiki Beach, December 2018

10,400,000

VISITOR ARRIVALS 2019



Waikiki Beach, April 2020

# Global Pandemic Hits

ECONOMIC COLLAPSE BEGINS,  
*but...opportunities emerge*



## *Strategic Plan 2020-2025*

*Global Pandemic + Economic Collapse*

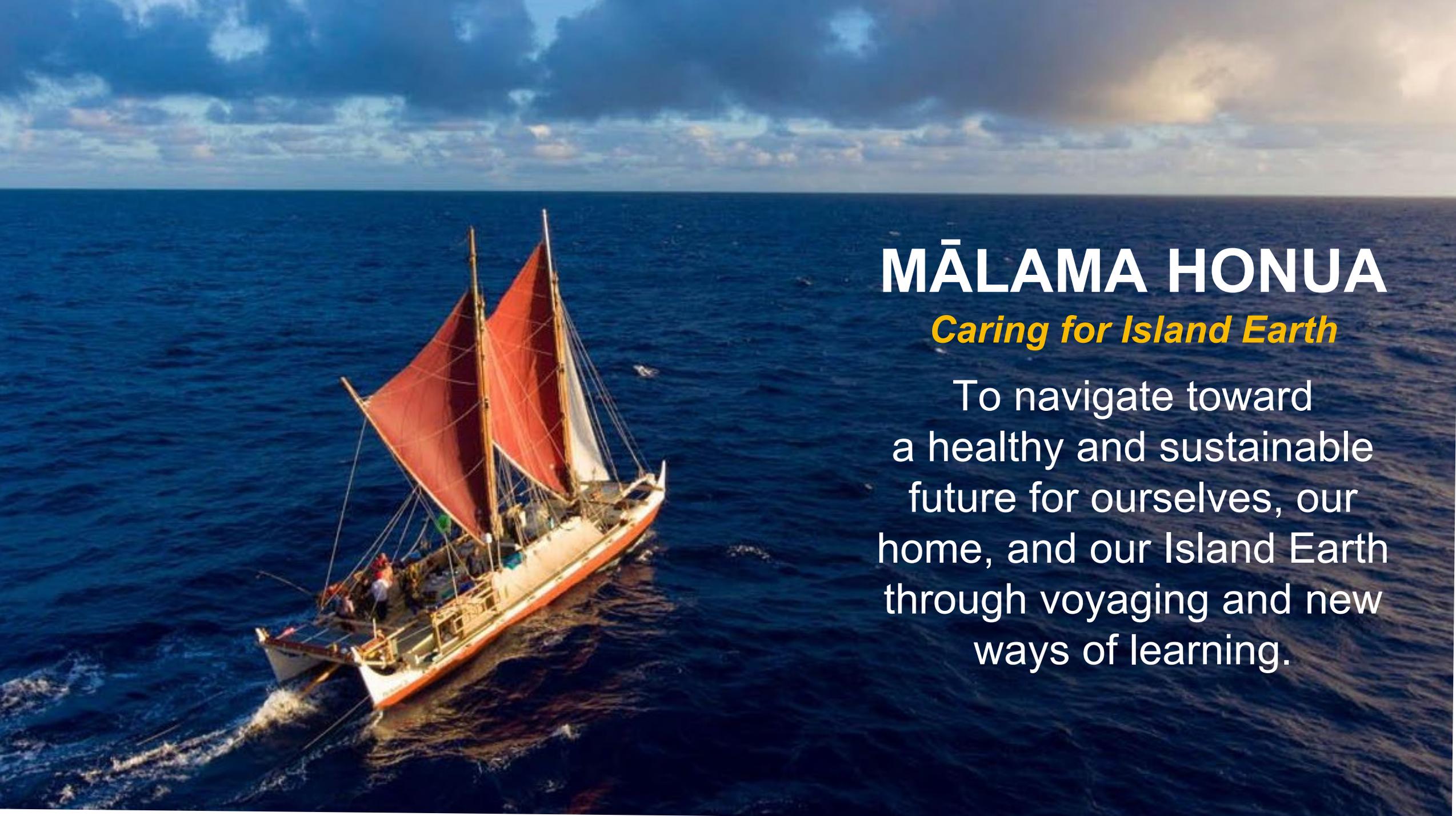
**Natural  
Resources**

**Hawaiian  
Culture**

**Community**

**Brand  
Marketing**

*Regenerative Tourism*



# MĀLAMA HONUA

## *Caring for Island Earth*

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

# A Voyage of Recovery & Rediscovery



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



**What does "Mālama Ku‘u Home O‘ahu" and the idea of mutually beneficial tourism look like to you?**

# State of Tourism on O'ahu



# 2020 Year in Review and YTD Q1 2021 – Visitors to O‘ahu

## Average Daily Census



2019

**6,154,248**

TOTAL O‘AHU VISITORS

YTD QTR 1 2021P

**391,333**

TOTAL O‘AHU VISITORS

**-68.0%**

Year-Over-Year

2020P

**1,515,013**

TOTAL O‘AHU VISITORS

**-75.4%**

Year-Over-Year

**US\$ 523.2M**

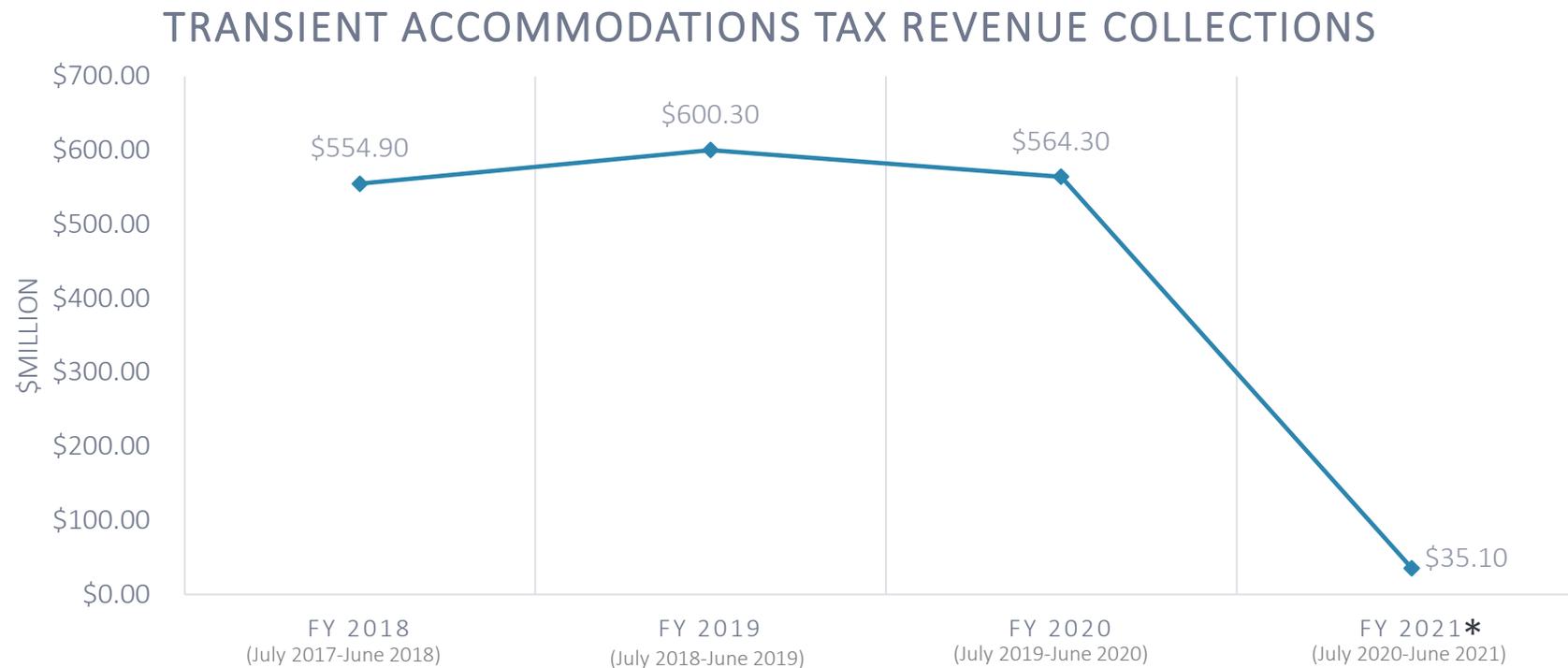
TOTAL O‘AHU SPEND

**-67.1%**

Year-Over-Year

# State of Hawai‘i’s Visitor Industry – State Tax Revenue

Tourism contributed to **\$2.07 billion** in State Tax Revenue in 2019



Source: Dept. of Tax

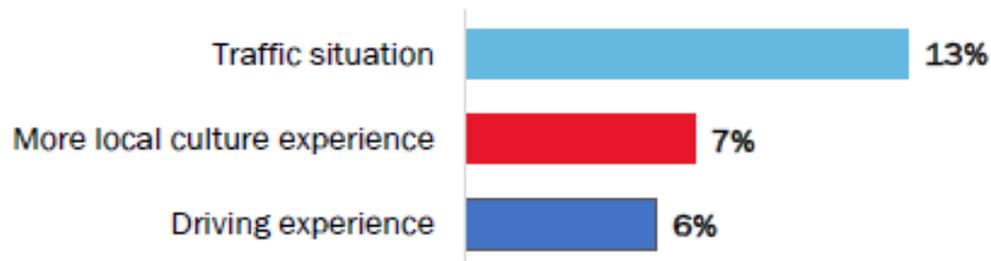
\* FY 2021 from July-Dec 2020. Preliminary

# 2019p O'ahu Visitor Satisfaction

## REASONS FOR NOT REVISITING\*



## AREAS FOR IMPROVEMENT\*



## OVERALL SATISFACTION



## LIKELY TO RECOMMEND



## LIKELY TO VISIT OAHU IN THE NEXT 5 YEARS



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

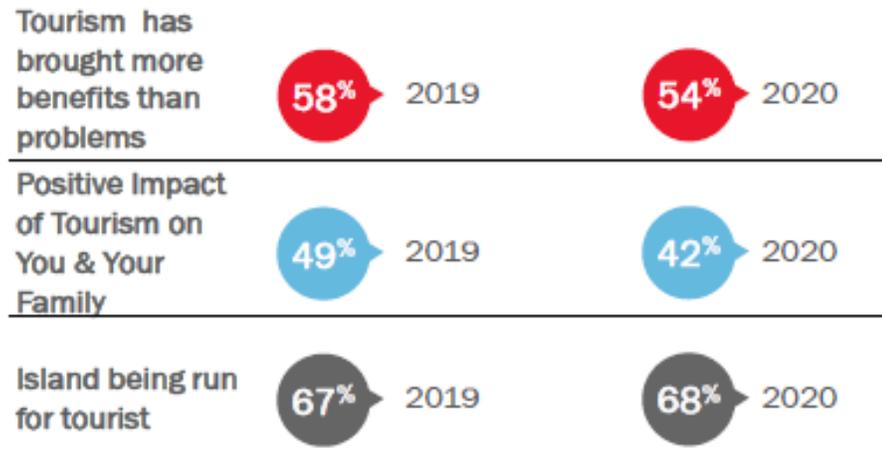
Likelihood: The percent of visitors who rated a 7 or 8 on a scale where 1=Very Unlikely and 8=Very Likely

Visitor Satisfaction & Activity Report (VSAT) 2019

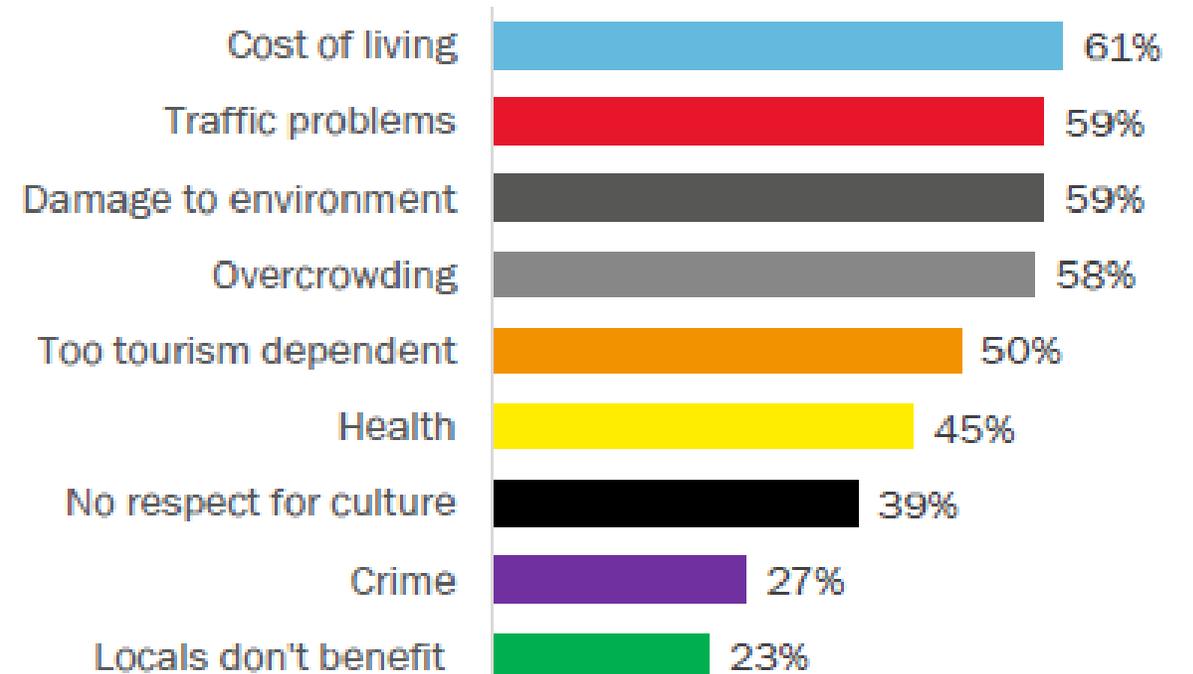
# 2020 O'ahu Resident Sentiment Towards Tourism



Resident  
Sentiment  
(Oahu, 2020)



## Problems Created by Tourism (Oahu, 2020)



# Why Are We Doing A Destination Management Action Plan?



- Reset, Rebuild, Redefine the Visitor Industry on O‘ahu
- Set a new direction for tourism through collaboration and community engagement
- Establish better systems for destination management

**Help us move Towards  
REGENERATIVE TOURISM**

**Our Challenge: Redirecting a complex system**

# Identify Appropriate Balance

---

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

# Where we are in this multi-step process:

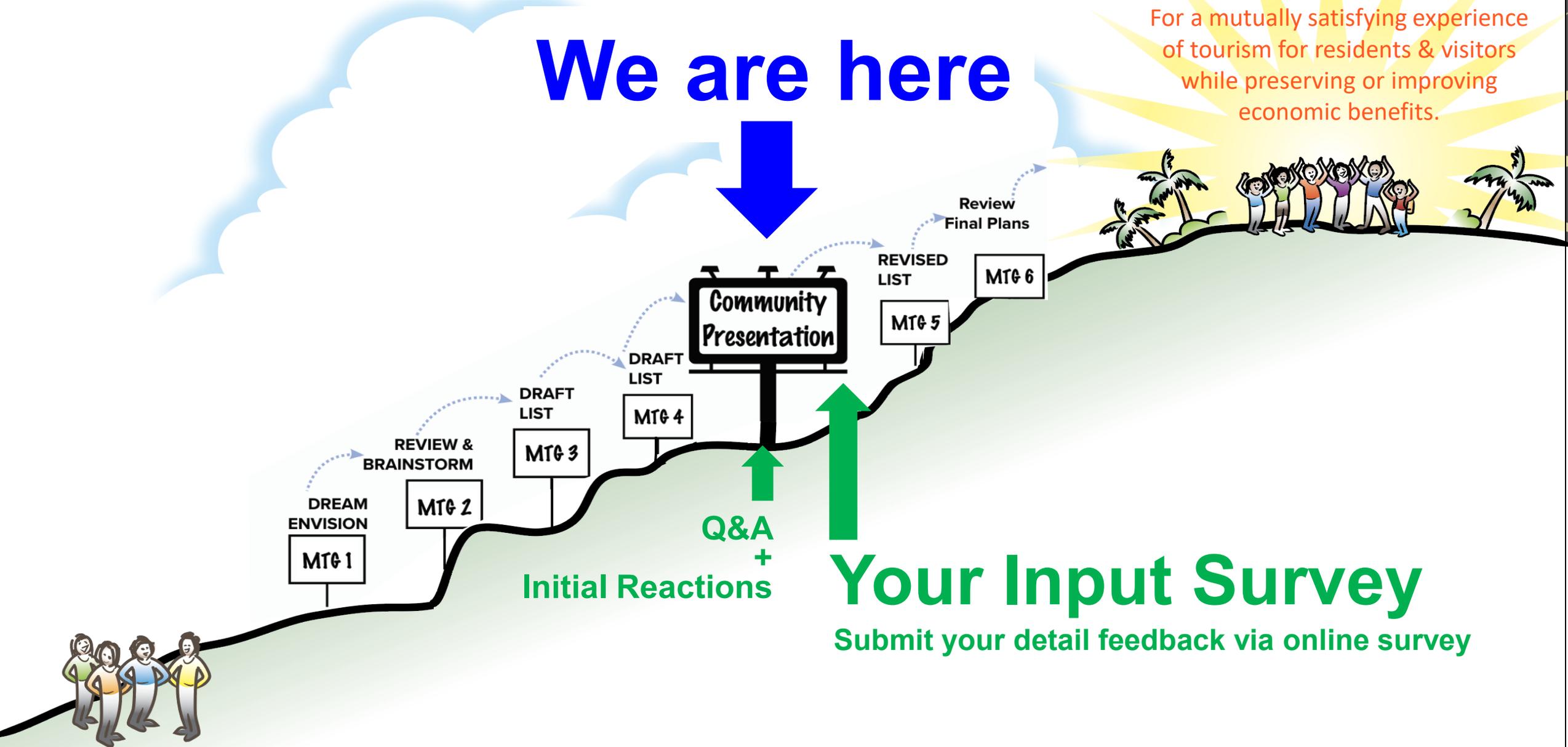
**HTAs 2021-2024**  
**O'ahu Destination Management**  
**Action Plan**  
For a mutually satisfying experience  
of tourism for residents & visitors  
while preserving or improving  
economic benefits.

## We are here

Initial Reactions

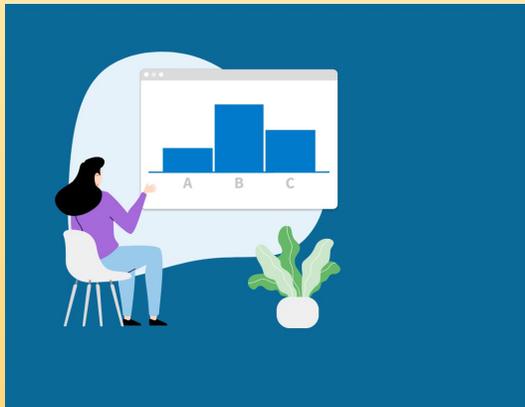
## Your Input Survey

Submit your detail feedback via online survey



# We want to hear from you!

**LIVE**  
during this presentation  
general feedback  
[Pollev.com/HTAtalk](https://Pollev.com/HTAtalk)

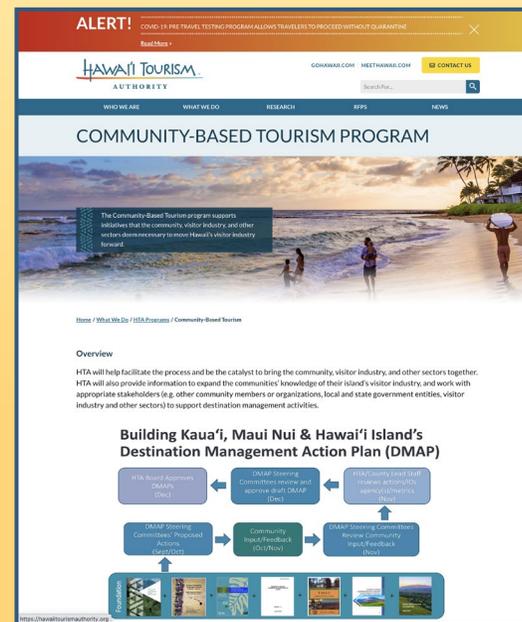


Waiting for htatalk's presentation to begin...

htatalk's presentation is underway. As soon as the activity is active, you'll see it on the screen here. Stay put.

Home History Registration Present Log in

**AFTER Presentation**  
through May 21, Detail  
input:  
[\(bit.ly/oahudmapinput\)](https://bit.ly/oahudmapinput)



**ALERT!** COVID-19 PRE TRAVEL TESTING PROGRAM ALLOWS TRAVELERS TO PROCEED WITHOUT QUARANTINE

HAWAII TOURISM AUTHORITY

COMMUNITY-BASED TOURISM PROGRAM

The Community-Based Tourism program supports initiatives that the community, visitor industry, and other sectors deem necessary to move Hawaii's visitor industry forward.

Overview

HTA will help facilitate the process and be the catalyst to bring the community, visitor industry, and other sectors together. HTA will also provide information to expand the communities' knowledge of their island's visitor industry, and work with appropriate stakeholders (e.g. other community members or organizations, local and state government entities, visitor industry and other sectors) to support destination management activities.

**Building Kaua'i, Maui Nui & Hawai'i Island's Destination Management Action Plan (DMAP)**

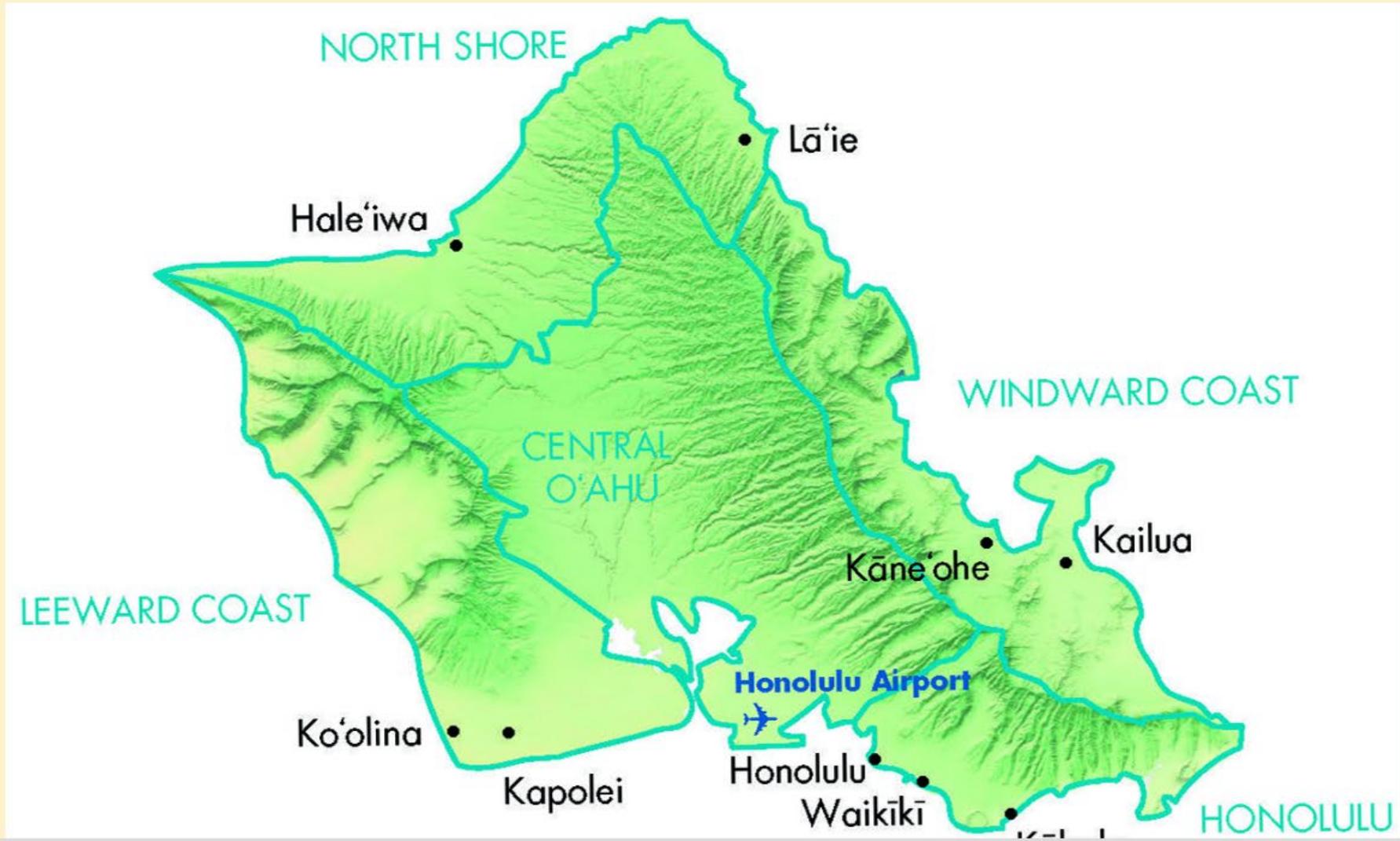
```
graph TD
    A[HTA Board Approves DMAP (DMC)] --> B[DMAP Steering Committee: Periodic Actions (SOP/DO)]
    B --> C[DMAP Steering Committee: Review Community Input/Feedback (DO)]
    C --> D[DMAP Steering Committee: Review and Approve/Revise DMAP (DO)]
    D --> E[DMAP Steering Committee: Review and Approve/Revise DMAP (DO)]
```

**What HTA will do with your input:**

- Compile and consider
- Revise action list based on input
- Make all comments available for public viewing

# Q&A – Project Planning

# Click on the map to show where you live.



# Steering Committee Process



# O'ahu DMAP Steering Committee Members



**Paula Akana**  
‘Iolani Palace



**Jamie Barut**  
Polynesian  
Adventure Tours  
Makakilo/  
Kapolei



**Adam Borrello**  
North Shore  
Community  
Land Trust  
North Shore



**Rick Egged**  
Waikīkī  
Improvement  
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Kaka‘ako



**Sweetie Nelson**  
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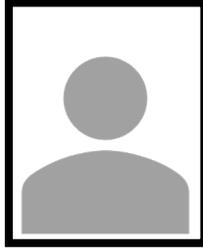
**Sunshine Topping**  
Hawai‘i Pacific Health  
Wai‘alae Nui



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Wheeler**  
O‘ahu Visitors Bureau  
Kaimukī



**Kevin Chang**  
Community Member  
Kahulu‘u



**Walea Constantinau**  
County - Film Office



**Chenoa Farnsworth**  
Blue Startups  
Kaimukī



**Joseph Lapilio**  
Wai‘anae Economic  
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Wai‘anae



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Pearl Harbor  
Aviation Museum  
Hawai‘i Kai



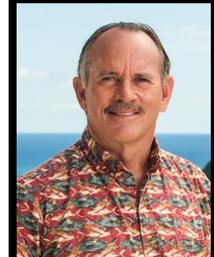
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Institute  
Kaimukī



**Sherry Menor-McNamara**  
HTA Board, Chamber of  
Commerce Hawai‘i



**Maile Meyer**  
Na Mea Hawai‘i  
Makiki



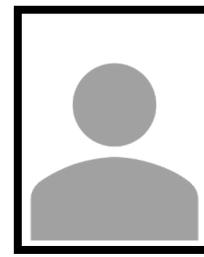
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Kualoa Ranch



**Kealii Pang**  
O‘ahu Council of the  
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Pālolo Valley, Kaimukī



**Ben Rafter**  
HTA Board,  
Springboard  
Hospitality  
Waikīkī



**Laura Thielen**  
County - Dept.  
of Parks and  
Recreation  
Kailua



**Ulalia Woodside**  
Nature Conservancy  
of Hawai‘i  
Waimānalo

# O'ahu DMAP Steering Committee Members



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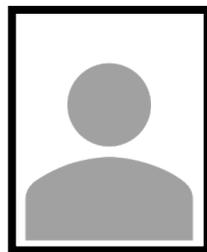
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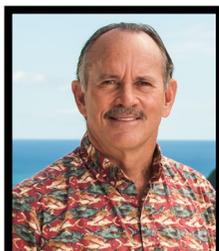
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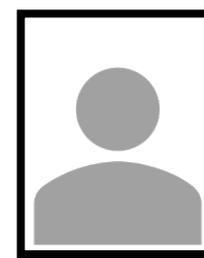
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Waikīkī



**Laura Thielen**  
County - Dept. of  
Parks and Recreation  
Kailua

# Process Overview

## 1. Reviewed Plans/Strategies/Vision

### ● HTA Mission

To strategically manage Hawai'i Tourism in a manner that is consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

### ● Guiding Principle

Regenerative Tourism: leaves the destination a better place for future generations.



### ● 2025 Hawai'i Tourism Vision

Ho'oulu (Grow) the uniqueness & integrity of the Native Hawaiian culture & community  
Provide a unique, memorable, & enriching visitor experience;  
Generate clear community benefits  
Responsibly manage tourism-related impacts and issues;  
Support a vital and substantial economy

### ● 2023 O'ahu Tourism Vision

### ● Key Performance Indicators

#### SATISFACTION

RESIDENT Survey: Agree tourism brings more benefits than problems, and agree tourism positively affects you/family.

VISITOR Survey: Overall Hawai'i vacation rating; exceeded expectations; likely to recommend Hawai'i; likely to revisit in next five years

#### VISITOR SPENDING

DAILY SPEND  
Maintain or increase average Per-Person-Per-Day (PPPD) visitor spending

TOTAL SPEND  
Maintain or increase total direct visitor spending

### ● Propelling Strategies (4 Pillars)

#### Natural Resources

Respect our Natural & Cultural Resources

#### Hawaiian Culture

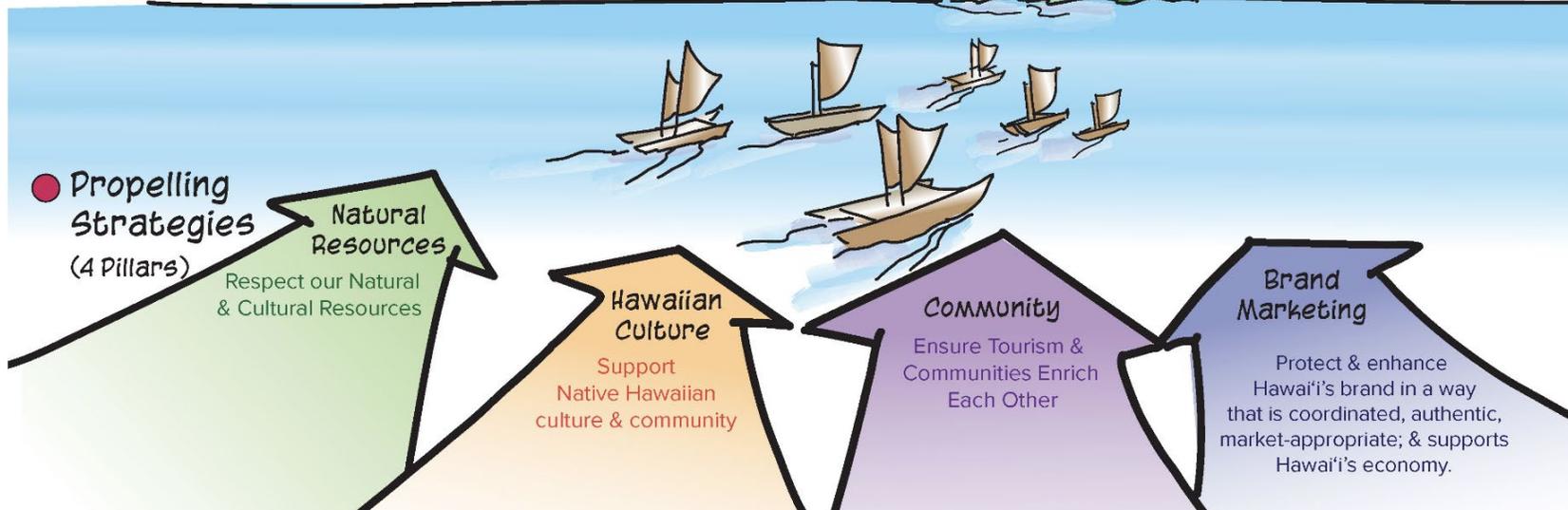
Support Native Hawaiian culture & community

#### Community

Ensure Tourism & Communities Enrich Each Other

#### Brand Marketing

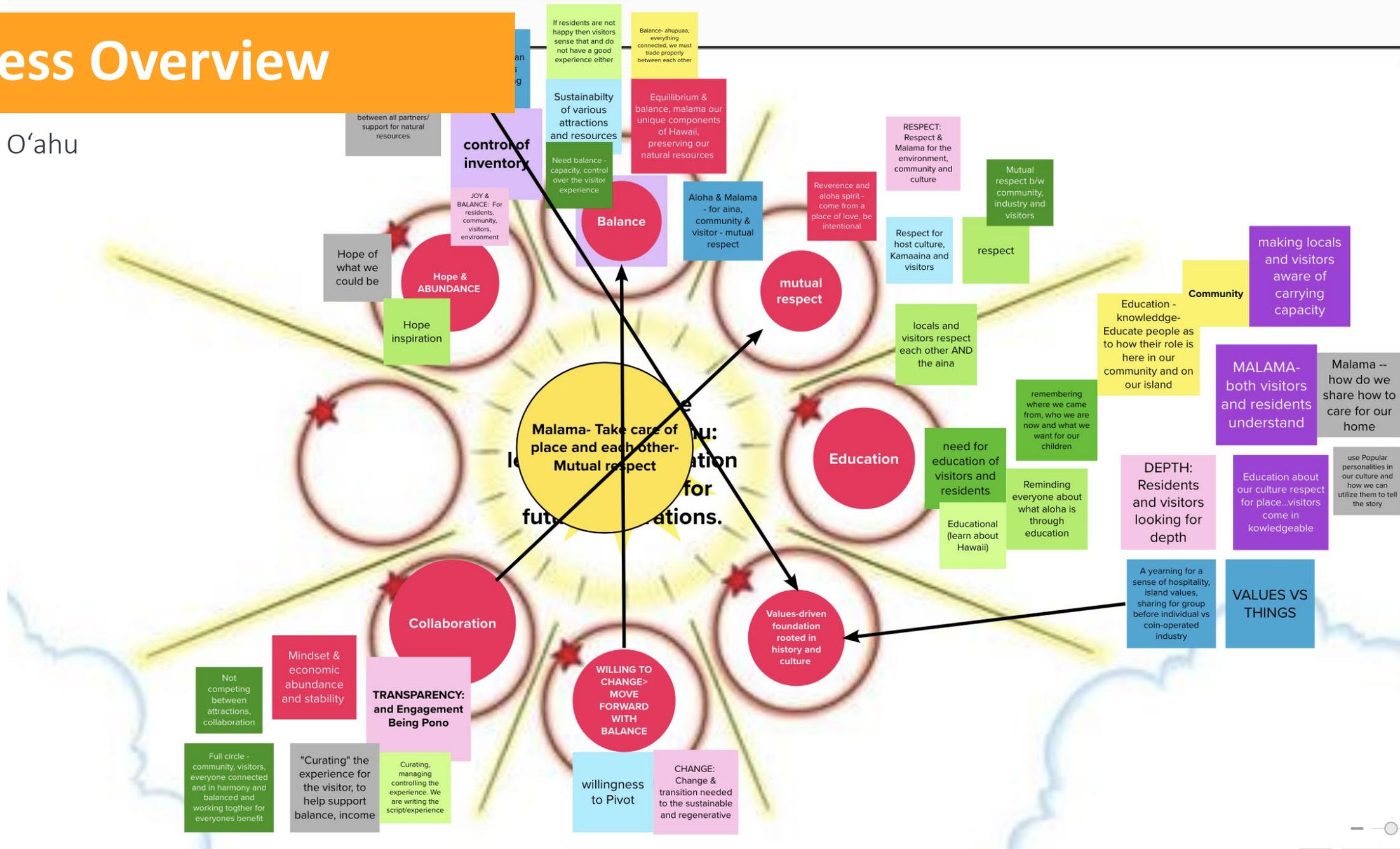
Protect & enhance Hawai'i's brand in a way that is coordinated, authentic, market-appropriate; & supports Hawai'i's economy.





# Process Overview

## 3. Vision for O'ahu







# Proposed Anchor Action Summary

## Better Manage Visitors On O'ahu

Establish a **"Regenerative Tourism Advisory Committee"** for the City & County of Honolulu to identify and manage problem issues for O'ahu.

Manage number of visitors on O'ahu by **discouraging short-term vacation rentals**

Identify, assess, and **prioritize key hotspots** on O'ahu that need to be better managed

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

## Manage Destination Experiences for Mutual Benefit of the Communities and Visitors

Develop, market, encourage, and **support more collaborative, curated experiences** that enrich residents and visitors alike

**Foster seamless interaction between community & visitors** through cultural experiences and knowledge

Work with Destination Management Companies and Meeting Planners to **integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives**

### GOAL

**A Mutually Satisfying Experience in/of Hawai'i for both Resident & Visitor**  
Maintain or Increase Value & Revenues

## Ensure Tourism and Communities Enrich Each Other and the 'Āina

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

**Expand on programs that strengthen partnerships and encourage mutual support** between the visitor industry and community organizations

Create certification programs to ensure that visitor industry professionals are more knowledgeable

**Implement communications program to encourage resident participation** and develop a better understanding of the how "regenerative tourism" is being implemented

Develop and implement **marketing programs to attract positive impact travelers** who prioritize environment, culture and investing in our local community and effectively decreasing the interest of undesired travelers

Implement a pre- and post-arrival **tourism marketing communications program to encourage respectful and supportive (regenerative) behavior**

**Expose visitors to quality local products** vs. generic/mass manufactured "local" items

Establish a **"Regenerative Tourism Fee"** where money goes directly to support repair/restoration of hotspots, management of sites, unfunded conservation liabilities and natural resources issues

**Expand programs in hospitality training** across all facets of the visitor industry.

**Deepen investment in partnerships with industry to expand sustainable environmental practices**

## Target Positive Impact Travelers to O'ahu and Encourage Responsible Visitor Behavior



# Proposed Draft High-Level Actions

By O'ahu DMAP Steering  
Committee

# Proposed Anchor Action



## Better Manage Visitors On O'ahu

Establish a **“Regenerative Tourism Advisory Committee”** for the City & County of Honolulu to identify and manage problem issues for O'ahu.

Manage number of visitors on O'ahu by **discouraging short-term vacation rentals.**

Identify, assess, and **prioritize key hotspots on O'ahu** that need to be better managed

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

- Questions on this topic? Use the Q& A Panel

# Proposed Anchor Action



## Target Positive Impact Travelers to O‘ahu and Encourage Responsible Visitor Behavior

Develop and implement marketing programs to attract positive impact travelers who prioritize environment, culture and investing in our local community and effectively decreasing the interest of undesired travelers.

Implement a pre- and post-arrival tourism marketing communications program to encourage respectful and supportive (regenerative) behavior.

- Questions on this topic? Use the Q& A Panel

# Proposed Anchor Action



## Manage Destination Experiences for Mutual Benefit of the Communities and Visitors

Develop, market, encourage, and support more collaborative, curated experiences that enrich residents and visitors alike.

Foster seamless interaction between community and visitors through cultural experiences and knowledge.

Work with Destination Management Companies and Meeting Planners to integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives market.

- Questions on this topic? Use the Q& A Panel

# Proposed Anchor Action



## Ensure Tourism and Communities Enrich Each Other and the 'Āina

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

Expose visitors to quality local products vs. generic/mass manufactured “local” items.

Expand on programs that strengthen partnerships and encourage mutual support between the visitor industry and community organizations.

Create certification programs to ensure that visitor industry professionals are more knowledgeable and share appropriately with visitors.

- Questions on this topic? Use the Q& A Panel

# Proposed Anchor Action



## Ensure Tourism and Communities Enrich Each Other and the 'Āina (continue)

Expand programs in hospitality training across all facets of the visitor industry.

Implement communications program to encourage resident participation and better understanding of the how “regenerative tourism” is being implemented.

Deepen investment in partnerships with industry to **expand sustainable environmental practices.**

Establish a **“Regenerative Tourism Fee”** where money goes directly to support repair/restoration of hotspots, management of sites, unfunded conservation liabilities and natural resources issues.

- Questions on this topic? Use the Q& A Panel

# Proposed Anchor Action Summary

## Better Manage Visitors On O'ahu

Establish a **"Regenerative Tourism Advisory Committee"** for the City & County of Honolulu to identify and manage problem issues for O'ahu.

Manage number of visitors on O'ahu by **discouraging short-term vacation rentals**

Identify, assess, and **prioritize key hotspots** on O'ahu that need to be better managed

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

## Manage Destination Experiences for Mutual Benefit of the Communities and Visitors

Develop, market, encourage, and **support more collaborative, curated experiences** that enrich residents and visitors alike

**Foster seamless interaction between community & visitors** through cultural experiences and knowledge

Work with Destination Management Companies and Meeting Planners to **integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives**

### GOAL

**A Mutually Satisfying Experience in/of Hawai'i for both Resident & Visitor**  
Maintain or Increase Value & Revenues

## Ensure Tourism and Communities Enrich Each Other and the 'Āina

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

**Expand on programs that strengthen partnerships and encourage mutual support** between the visitor industry and community organizations

**Expose visitors to quality local products** vs. generic/mass manufactured "local" items

Establish a **"Regenerative Tourism Fee"** where money goes directly to support repair/restoration of hotspots, management of sites, unfunded conservation liabilities and natural resources issues

Create certification programs to ensure that visitor industry professionals are more knowledgeable

**Implement communications program to encourage resident participation** and develop a better understanding of the how "regenerative tourism" is being implemented

**Expand programs in hospitality training** across all facets of the visitor industry.

**Deepen investment in partnerships with industry to expand sustainable environmental practices**

Develop and implement **marketing programs to attract positive impact travelers** who prioritize environment, culture and investing in our local community and effectively decreasing the interest of undesired travelers

Implement a pre- and post-arrival **tourism marketing communications program to encourage respectful and supportive (regenerative) behavior**

## Target Positive Impact Travelers to O'ahu and Encourage Responsible Visitor Behavior

# Q&A – Draft Actions

# Proposed Anchor Action Summary

## Better Manage Visitors On O'ahu

Establish a **"Regenerative Tourism Advisory Committee"** for the City & County of Honolulu to identify and manage problem issues for O'ahu.

Manage number of visitors on O'ahu by **discouraging short-term vacation rentals**

Identify, assess, and **prioritize key hotspots** on O'ahu that need to be better managed

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

## Manage Destination Experiences for Mutual Benefit of the Communities and Visitors

Develop, market, encourage, and **support more collaborative, curated experiences** that enrich residents and visitors alike

**Foster seamless interaction between community & visitors** through cultural experiences and knowledge

Work with Destination Management Companies and Meeting Planners to **integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives**

**GOAL**  
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Implement a pre- and post-arrival **tourism marketing communications program to encourage respectful and supportive (regenerative) behavior**

## Target Positive Impact Travelers to O'ahu and Encourage Responsible Visitor Behavior

**Select actions you believe will lead to a mutually satisfying resident and visitor experience AND preserve or boost economic benefits on O‘ahu. (Use as many or few responses as you like.)**

Establish a “Regenerative Tourism Advisory Committee” for the City & County of Honolulu to identify and manage problem issues for O‘ahu.

Manage number of visitors on O‘ahu by discouraging short-term vacation rentals.

Identify, assess, and prioritize key hotspots on O‘ahu that need to be better managed.

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

Develop and implement marketing programs to attract positive impact travelers who prioritize environment, culture and investing in our local community and effectively decreasing the interest of undesired travelers.

Implement a pre- and post-arrival tourism marketing communications program to encourage respectful and supportive (regenerative) behavior.

Develop, market, encourage, and support more collaborative, curated experiences that enrich residents and visitors alike.

Foster seamless interaction between community and visitors through cultural experiences and knowledge.

Work with Destination Management Companies and Meeting Planners to integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives market.

🖥️ When poll is active, respond at [pollev.com/htatalk](https://pollev.com/htatalk)

📱 Text **HTATALK** to **22333** once to join

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

Expose visitors to quality local products vs. generic/mass manufactured “local” items.

Expand on programs that strengthen partnerships and encourage mutual support between the visitor industry and community organizations.

Create certification programs to ensure that visitor industry professionals are more knowledgeable and share appropriately with visitors.

Expand programs in hospitality training across all facets of the visitor industry.

Implement communications program to encourage resident participation and better understanding of the how “regenerative tourism” is being implemented.

Deepen investment in partnerships with industry to expand sustainable environmental practices.

Establish a “Regenerative Tourism Fee” where money goes directly to support repair/restoration of hotspots, management of sites, unfunded conservation liabilities and natural resources issues.

# What other important Anchor Actions should HTA consider?

**Hot Spots"- List areas/sites you feel are or may become over-crowded, too heavily impacted, or have other tourism related issues and should be managed more intentionally, if any.**

# Next Steps

## Community:

- Submit presentation evaluation.
- Complete online input survey: [bit.ly/oahudmapinput](https://bit.ly/oahudmapinput) (May 21)
- Go to [Hawaiiauthority.org](https://hawaiiauthority.org) for
  - Answers to today's questions (mid-May)
  - Community input survey results (week of May 24)

## O'ahu Steering Committee:

- Will meet in early June to review and finalize proposed draft actions.





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



# Mahalo

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

HAWAII TOURISM  
AUTHORITY