



**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'akolu 24 Iulai 2024, 2:00 p.m.
Wednesday, July 24, 2024 at 2:00 p.m.

E ho'olele 'iwa'ia ka hālāwai ma o ka Zoom. Meeting will be live streaming via Zoom.
<https://us06web.zoom.us/j/89273472061>

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: 892 7347 2061

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 hana 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 June 26, 2024 Ho'okahua Hawai'i Standing Committee Meeting

4. *Hō'ike'ike, Kūkā, a Hana no ka Palapala Hō'ike Hō'ana I Ka Papahana Mālama 'Āina Ho'okipa*
Presentation, Discussion and/or Action on the Destination Management Action Plan Evaluation Report Findings by Pacific Research and Evaluation (PRE).

5. *Hō'ike'ike na ka OmniTrak Group no ka Hopena Anamana'o Mana'o Mea Noho*
Presentation of DBEDT's Spring 2024 Resident Sentiment Survey by Chris Kam of Omnitrak Group

6. *Hō'ike'ike, Kūkā, a Hana no ke Kālā Pōulia 'Oihana Ho'okipa*
Presentation, Discussion and/or Action on the Maui Recovery Tourism Emergency Special Fund

7. *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 2 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 papahelu 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.

3

Approval of the Minutes of the June 26, 2024 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
Wednesday, June 26, 2024, at 10:00 a.m.
VIRTUAL MEETING**

MINUTES OF HO'OKAHUA HAWAI'I STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Mahina Paishon (Chair), Dylan Ching (Vice Chair), Kimberly Agas, Mufi Hannemann, Sherry Menor-McNamara
MEMBER NOT PRESENT:	Sig Zane
NON-VOTING MEMBER:	David Arakawa
HTA STAFF PRESENT:	Kalani Ka'anā'anā, Talon Kishi, Caroline Anderson, Maka Casson-Fisher, Carole Hagihara
GUEST:	Dede Howa, Tyler Gomes
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Chair Paishon called the meeting to order at 10:02 a.m. Mr. Casson-Fisher opened the meeting with the E Hō Mai chant.

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. Mr. Zane was excused. Chair Paishon recognized Mr. Ching, Ms. Menor-McNamara, and Mr. Zane as their term for the HTA board expired at the end of June 2024. She expressed her gratitude to them all for serving on the committee.

3. Approval of Minutes of the May 20, 202 Ho'okahua Hawai'i Standing Committee Meeting

Ms. Menor-McNamara made a motion to approve the minutes. Mr. Ching seconded, and the motion was approved unanimously.

4. Presentation, Discussion and/or Action on Destination Stewardship Strategies for Fiscal Year 2025, Fiscal Year 2026-2027

At the previous meeting, approval was recommended of the Destination Stewardship Strategies to the full Board for their approval. The previous discussion was shortened, and they wanted to provide a second opportunity for the community to provide any further feedback to the team regarding the strategies.

Mr. Casson-Fisher presented the strategies from the Destination Stewardship branch. Strategies included:

Fostering collaboration between communities.

Implementing community-based tourism initiatives.

Developing educational programs aimed at increasing awareness among visitors about the destination's natural and cultural heritage.

Providing training and resources for tourism industry professionals

Promoting regenerative tourism practices

Using technology such as online booking systems and real-time data monitoring to better manage visitor flows.

Developing comprehensive crisis management plans to address emergencies.

Continuing to support programs that assist visitors in crisis.

Providing training and support for tourism businesses and community organizations

Continuing to implement programs that preserve and promote Hawai'i multi-ethnic cultural heritage through the HTA's Visitor Experience products.

Encouraging businesses to adopt environmentally friendly practices,

Implementing visitor management strategies

Forging partnerships with other destinations, organizations, and academic institutions to ensure best practices.

Collaboration with international organizations and initiatives focused on sustainable tourism.

Establishing monitoring and evaluation mechanisms to track the progress of destination stewardship initiatives.

Collecting data on key indicators, such as visitor satisfaction, environmental quality, and community well-being, to inform decision-making and future planning efforts.

Chair Paishon asked Ms. Anderson whether she thought those were the best strategies to get the HTA to meet the milestones and targets already laid out in the DMAP and Strategic Plan. Ms. Anderson said that they are the best. She is working with the staff to develop KPIs and measures in alignment with the Strategic Plan and targets.

Chair Paishon asked if they are attentive to new insights or what contractors have been informing them on how current strategies are being delivered. Is the HTA being nimble enough and taking in real-time feedback and input to ensure the strategies are relevant and cognizant of what is working and in place? Ms. Anderson deferred to Mr. Ka'anā'anā as his team produced the strategy. Ms. Howa answered that Mr. Ka'anā'anā was not available at the time. She said they have considered community feedback in developing the strategy, particularly the first two. The first is fostering collaboration between local communities, government agencies, and tourism stakeholders to ensure the residents' voices are heard and respected. The second strategy is community-based tourism initiatives, allowing residents to participate in and benefit from tourism activities.

Ms. Paishon asked if the HTA has the monetary and non-monetary resources to implement the strategies. Mr. Ka'anā'anā said no. These were what they felt were most aligned with the current Strategic Plan based on what they had learned from the DMAP interactions. Some of the resourcing in FY2025 was relatively thin, but they are looking forward to it as a bridge year for 2026 and 2027. One of the other challenges is that they will have only one administrator to nine managers. The structure, policy, and procedures of working this way will be challenging, and they need to work on it. Chair Paishon asked about negotiations on what is possible given the resources available. She asked if some strategies or tactics came off the list because of resource limitations.

Ms. Howa said that for the strategies, they have incorporated everything they feel addresses Destination Stewardship, but regarding the budget question, they are trying to figure out what programs and products they can implement to address the strategies. That is where some things will come off the list. She had nothing firm to share but asked if Mr. Ka'anā'anā wanted to elaborate on ideas. Mr. Ka'anā'anā said what they intended to do was present their staff recommendations for the strategies and pair them with the budget conversation. That will help them make final decisions that have not been made yet.

Mr. Arakawa asked if they tried to get these programs in the budget or were thought of after the budget approval. He questioned why the programs were taken out when the community requested these programs. Mr. Ka'anā'anā said they went through the exercise to produce the strategies with the exemption of submitting Form A for FY2026 and FY2027. These are more forward-looking. FY2025 is a bridge year for them, and they will have to adjust. The strategies were developed with the intention and timing so the HTA had time to vet them for the upcoming biennium.

Mr. Arakawa asked Mr. Kishi when they have to submit Form A to DBEDT. Mr. Kishi said the form was due September 15, the previous year, and the deadline for DBEDT submission to B&F is around September 26. Mr. Kishi asked staff to provide comments by July 15, which will help him formulate the first draft of Form A that they will present to the committee and Board in the July meetings. Mr. Arakawa said they are ahead of the curve. He asked Mr. Kishi to prepare a timeline for all the committees and Board members so they can stay updated.

Chair Paishon said no vote was required for the agenda item. Mr. Hannemann said it is good to know they will do everything to ensure that Destination Management Stewardship is part of the HTA's responsibilities. It is good that they have a plan, strategy, and funding, and they will be able to show their staffing needs and start developing a good track record for implementing a very important objective in what they do. Chair Paishon agreed with Mr. Hannemann.

Mr. Arakawa said he believes some of this is taking over planning duties for the Office of Planning and Sustainable Development (OPSD). Perhaps the staff and Mr. Kishi could research with OPSD how many staff they have and their budget to help the HTA implement this. Ms. Anderson said they were updated on the Tourism Functional Plan in the past legislative sessions. She has been working with OPSD to get the ball rolling and has been discussing resources with them. She is putting together what is needed to carry out the plan update. Mr. Arakawa said maybe that is a policy call from the Board to work with DBEDT and OPSD to help the HTA with resources.

Chair Paishon asked for direction on which committee should consider this suggestion and said they could move forward with it in future conversations. She spoke about KPIs and asked who develops the KPIs. Ms. Anderson said she works with the staff to produce the KPIs, looking at program objectives, goals, outputs, outcomes, etc. She said they have developed the KPIs, or the measures, and it is now about fine-tuning them. She could share the update in a future meeting if requested. Chair Paishon said the Board also adopted the AAEF declaration and process. In that process, they look for opportunities in every phase where communities can lend their expertise and support. She suggested applying some of those processes to the extent of building upon the work they have been working on. She asked how the members felt about

including community members in the process. Mr. Ching said getting the community involved is a positive impact.

Chair Paishon asked if the team could look at the ideal for extra staff and resources needed for the team to implement everything.

Mr. Ka'anā'anā congratulated Mr. Casson-Fisher and Ms. Dede Howa as this is a big project they have been working on. He thanked them for their work.

5. Presentation, Discussion and/or Action on Fiscal Year 2025 Budget

Mr. Kishi presented the HTA FY2025 Operating Budget. He spoke about the highlights. The legislature awarded them \$63 million for FY2025, but that amount has to be adjusted before they can confirm the amount available for new contracts. Those adjustments are \$33.6 million in multi-year contracts executed in prior fiscal years, including FY2024. There is a B&F 10% budget restriction of \$6.3 million. DMAP is \$3.5 million. Salaries for all the program IDs are at \$3.1 million. Administrative and Government Expenditures are \$1 million to support all the program IDs. This includes travel, meeting costs, office supplies, utilities, etc. After those adjustments, they have \$15.4 million available for new programs and contracts.

He explained the B&F 10% Budget Restriction:

5% hard restriction – B&F will reduce HTA's budget by \$3,150,000.

5% contingency restriction – B&F will reduce HTA's budget by another \$3,150,000 but may allot the funds in fiscal year 2025 Q4.

Historically, B&F has not returned the 5% contingency restriction to departments and agencies since fiscal year 2019.

Programs should develop "trigger plans" in the event B&F returns the funds to HTA; they could use the money for a side project.

B&F will allot HTA up to \$56.7 million at the start of the fiscal year. At the previous BFCC meeting, they discussed how the 10% restriction should be applied to the budget.

Each budget line item in the budget will be reduced by 10%.

Mr. Ching asked why the B&F did this. Mr. Kishi said the B&F wants to ensure projects do not go over budget or if they need money for an emergency. There are only restrictions for generally funded appropriations.

Mr. Arakawa asked if B&F sent out a memorandum about the 10% restriction. Mr. Kishi was unaware of a memorandum, but for the FY2024, they usually publish something called Budget Execution Instructions, which informs all the departments and agencies. In those instructions, they explained the 10% restrictions but did not reference the Maui wildfires. Mr. Arakawa asked to ensure all the Board members and chairs get this information.

Mr. Kishi showed the pie chart of the gross \$64 million budget without the restrictions:

BED113 Administrative & Governance (AG) has \$3.7 million

BED114 Branding and Marketing (BM) has \$39.2 million

BED115 Sports and Signature Events (SS) has \$7.3 million

BED116 Dest. Stewardship and Community (DC) has \$7.9 million

BED117 Regenerative Tourism Development (RD) has \$3.8 million

BED118 Workforce Development (WD) has \$1.1 million

Chair Paishon asked if there was a pie chart for 2024, but Mr. Kishi said he could make one for the July Board meeting.

Mr. Kishi spoke about the slide showing the budget per program.

Chair Paishon asked about multi-year contracts RFPs.

Mr. Kishi spoke about BED116 - Destination Stewardship and Community program. He estimated that they have already used \$1.1 million. He gave a few other examples.

Mr. Arakawa asked Mr. Kishi to explain the significance of program IDs and their flexibility to the committee. Mr. Kishi said the current year's budget is different because instead of having one program ID with all the money allocated this year, the legislature gave them six program IDs, namely:

BED113 Administrative & Governance

BED114 Branding

BED115 Sports and Signature Events

BED116 Destination Stewardship and Community

BED117 Regenerative Tourism Development

BED118 Workforce Development

The program IDs are essentially buckets for the program or mission. The HTA cannot allocate money between the buckets. Within program IDs, the legislature itemized the budgets. Mr. Arakawa said they asked the AG how flexible they could be with moving money, which may not be consistent with the program IDs and the worksheets. Mr. Kishi showed the budget worksheet published by the legislature and said he used it to prepare the budget statement for the slide deck. The legislature outlined the budget for every program or project.

Mr. Arakawa said that for the following year, they would recommend having the BFCC chair, vice-chair, Mr. Choy, and Mr. Kishi, involved with the Branding staff and conference committee so they can stay updated.

Mr. Hannemann appreciated Mr. Arakawa's comments. He gave some context. He spoke about what led to this situation. He said that for two years, the budget for the HTA was zero for two legislative sessions. The legislators had to be convinced they could trust the HTA with a recurring budget. Every year, they will start at \$63 million as the base. He said to keep in mind that lawmakers prefer who they talk to. They cannot take people to meetings if the legislature is not comfortable talking to those individuals. He said they needed to be sensitive to this. He said this needs to be factored in as they try to incorporate more people into the discussion. They are only allowed two Board members present at any meeting. He said it is significant that they now have a recurring budget, and they would want more in the future and want the restrictions taken away, but they must work with what they have for now.

Chair Paishon built on what Mr. Hannemann said about where the HTA is financially in her discussions with different legislatures. The HTA expected that they would utilize the financial resources designated back to the HTA in the DMAP area, which is one of the priority areas. They need the resources to implement what they said they would do on behalf of Hawai'i.

Mr. Arakawa agreed with the process outlined by Mr. Hannemann. He said that regarding the recurring budget, this legislature could not bind future legislatures to give a guaranteed amount. He would clarify that with the AG. He said that in the past, they have gone in with up to six members of the HTA to talk about budgets at the request of the budget chairs, WAM, and the finance chairs. They previously had a legislative PIG to do exactly that, but they could look into that again. Mr. Hannemann said the recurring budget came from Speaker Saiki and Chair Dela Cruz.

Mr. Kishi went over program ID 117 for Regenerative Tourism Development. They have \$3.7 million gross for the FY2025 budget, \$1.2 million of multi-year contracts, and a 10% restriction of \$376,000, leaving them with \$2 million for new programs and contracts. The multi-year

contracts cover the CNHA contract until December 2024. The Kilohana contract is Kūkulu Ola, Technical Assistance and Community Enrichment. There were no further questions or comments.

6. Kilohana Contract Updates

Mr. Gomes gave a program updates. He spoke about Visitor Education and Post-Arrival marketing (VEPAM). They have moved into a rhythm of creating a KPI thermometer produced by Nextstar Media, the parent company of KHON2. He showed how they are tracking KPIs. The final bar chart shows they are ahead of the expected points.

He highlighted that for TRAVEL808, five episodes go through the approval process with the staff. A video will be shown in the following day's BOD. There will be other materials about contract start to date, and benchmarks hit. There will be seven episodes of about twenty minutes each and a few shorts featuring regenerative desirable activities the HTA is involved in.

In terms of Maui VEPAM, that is a separate \$300,000 that the Board appropriated for Maui in response to the wildfire. They are in the process of finalizing the approvals on itineraries by Moku on Maui. This is to guide the visitors to the places they want them to go and give them ideas about things to do. He did not include a slide for technical assistance as he had provided the committee with a presentation the previous month, which would be shown to the full Board the following day.

He spoke about the Quality Assurance Program. The press conference is being held at the HCC, and more details will be provided later that day. He gave an update on the community funding opportunities 'Umeke portal. Most of the activities take place over the course of the year. They have only processed the final payment for three, which means those events have been evaluated. Everything else is in process and moving. He said that, for 2025, they are developing RFPs for the following year's funding opportunities. It was tight the past year, so the goal is to give them four months to go through the same application, evaluation, and awarding process to have contracts executed by December 31, 2024, which provides them a lot of time for execution.

Mr. Hannemann commended Mr. Gomes for putting together a great plan, and he is looking forward to the Qurator Program announcement later that day. Chair Paishon asked Mr. Gomes what some of the wins or achievements were. Mr. Gomes said having 'Umeke and the unification and development of the platform in such a short period is an excellent achievement, and he is proud of that. On the Visitor Education Post Arrival marketing side, they are still developing a voice and tone for the campaign, but he is proud of how it is growing. On the

Technical Assistance side, it is new and robust, and they are still on track to make the July 1 announcement that the application portal is open. He commended Mr. Jon Peahl and Ms. Anderson for a fantastic job creating something unlike any other program across the globe. That is a testament to how much work was put into this.

Chair Paishon asked his thoughts on what the HTA, Kilohana, and HVCB can do collectively with the community to engage them more proactively. Mr. Gomez said the community should try to take advantage of this and apply for as many programs as possible. When community members hear negative comments about the visitor industry, they could elaborate to others on how the visitor industry sustains them and enables them to support their staff, pay bills, support the community, etc.

Chair Paishon thanked Mr. Gomes and the team for their help.

Chair Paishon thanked everyone for all their hard work for the meeting.

7. Adjournment

Ms. Menor-McNamara and Mr. Ching gave their parting remarks about serving on the HTA Board. Chair Paishon adjourned the meeting at 11:18 a.m.

Respectfully submitted,



Sheillane Reyes
Recorder

5

Presentation of DBEDT's Spring 2024 Resident Sentiment Survey by Chris Kam of Omnitrak Group



Resident Sentiment Survey - Spring 2024 Highlights



Prepared for the:
State of Hawai'i
Department of Business, Economic Development & Tourism
June 2024
Fielded: March 5 through April 30, 2024



Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813
Telephone: 1-808-528-4050 omnitrak@omnitrakgroup.com

What's the Big Idea?

1

Destination Stewardship measures of Resident Sentiment are rising.

2

As Destination Stewardship initiatives take root:

- Key measures of Hawai'i Resident Sentiment edge upwards.
- The perceived balance of tourism's benefits vs. challenges gains strength.
- Providing residents a voice in tourism development takes on a new level of importance.

3

Nonetheless, perceived challenges of tourism remain, and require an integrated effort between multiple public and private sector organizations to address.





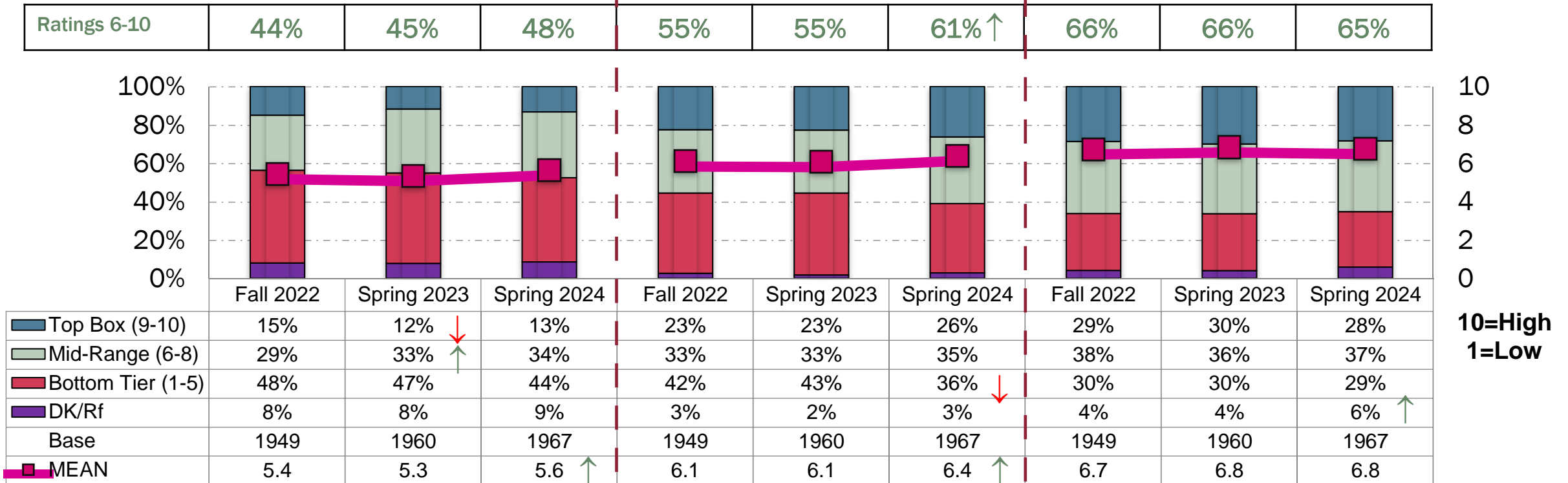
Destination stewardship measures of Resident Sentiment are rising

Destination Stewardship Indicators

Tourism is being better managed on my island

Tourism should be actively encouraged on my island

Tax dollars should be spent to MANAGE the impacts of tourism in my community



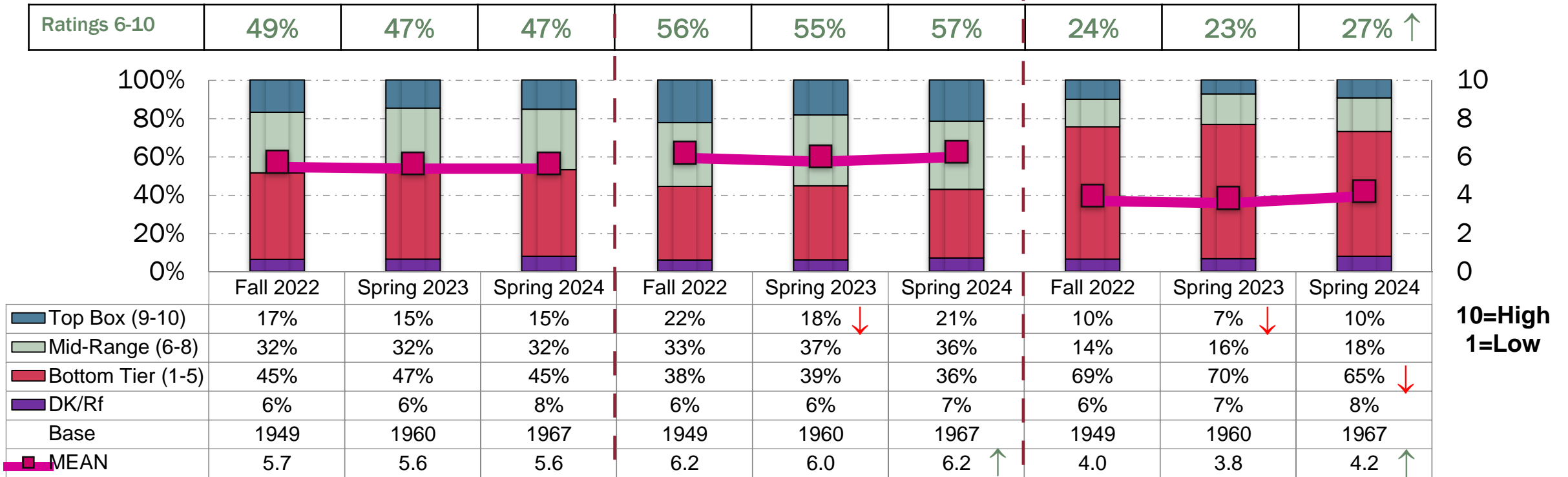
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Destination Stewardship Indicators (Continued)

More effort is being made to balance economic benefits of tourism and quality of life for residents

Tourism helps fund the stewardship of Hawai'i's natural resources, parks & cultural sites

I feel like I have a voice in my island's tourism development decisions

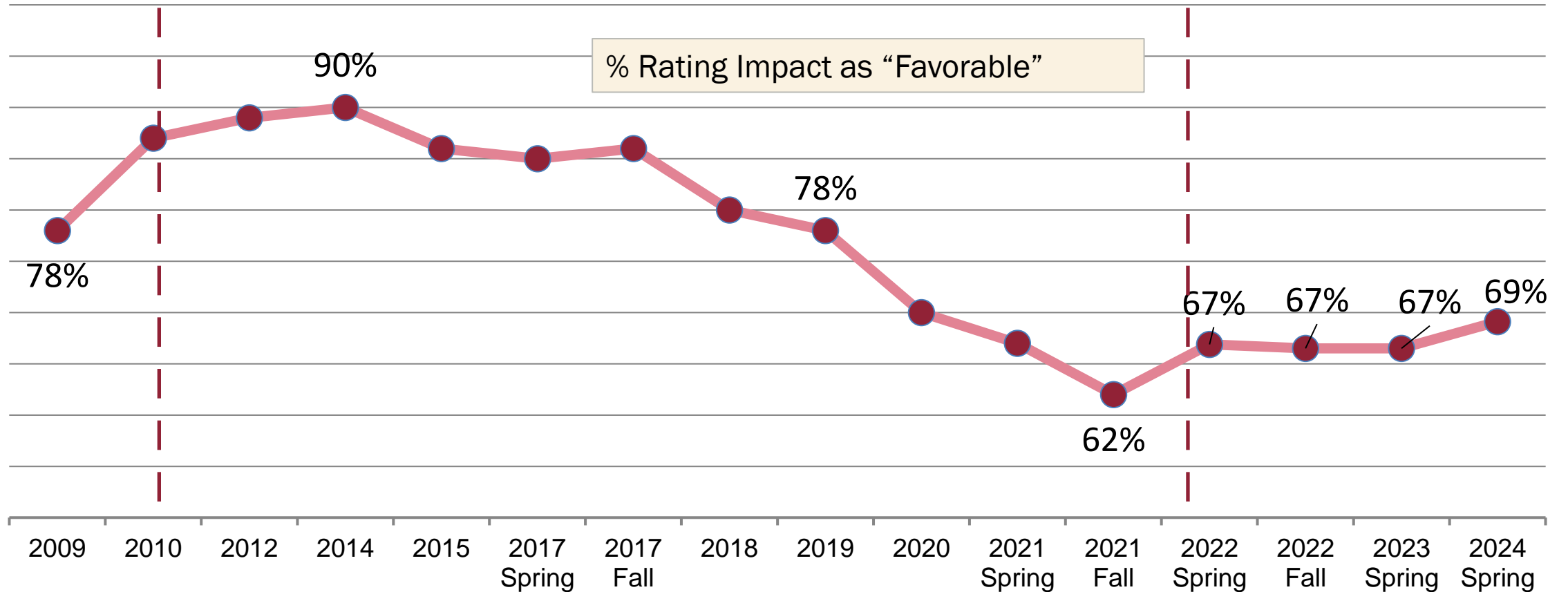


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



Key measures of Hawai'i Resident Sentiment edge upwards

Favorable Views of Hawai'i Tourism edging higher

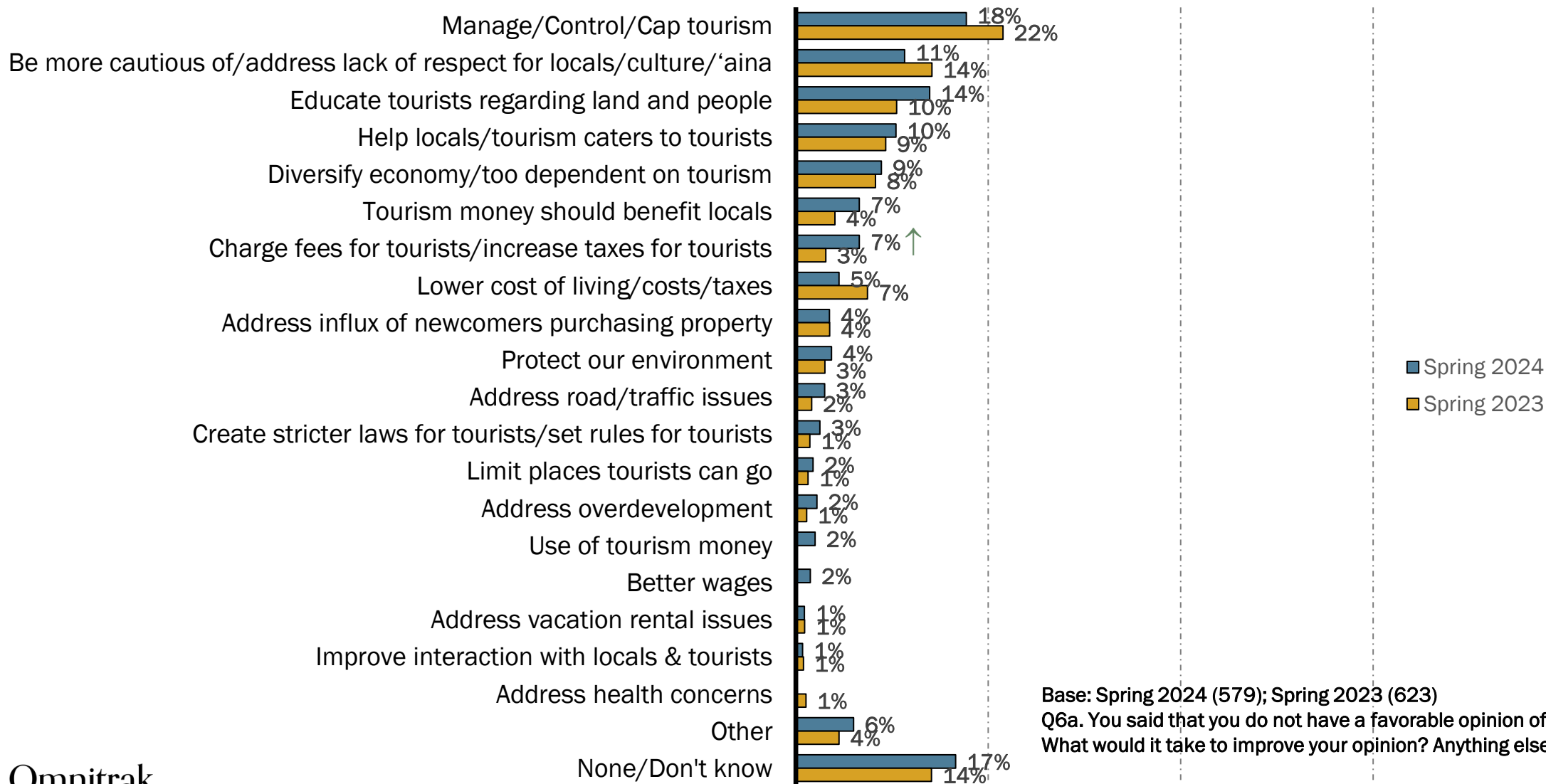


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Note: % with Favorable opinion of tourism defined as Rating of 6 to 10 on 10-point scale.

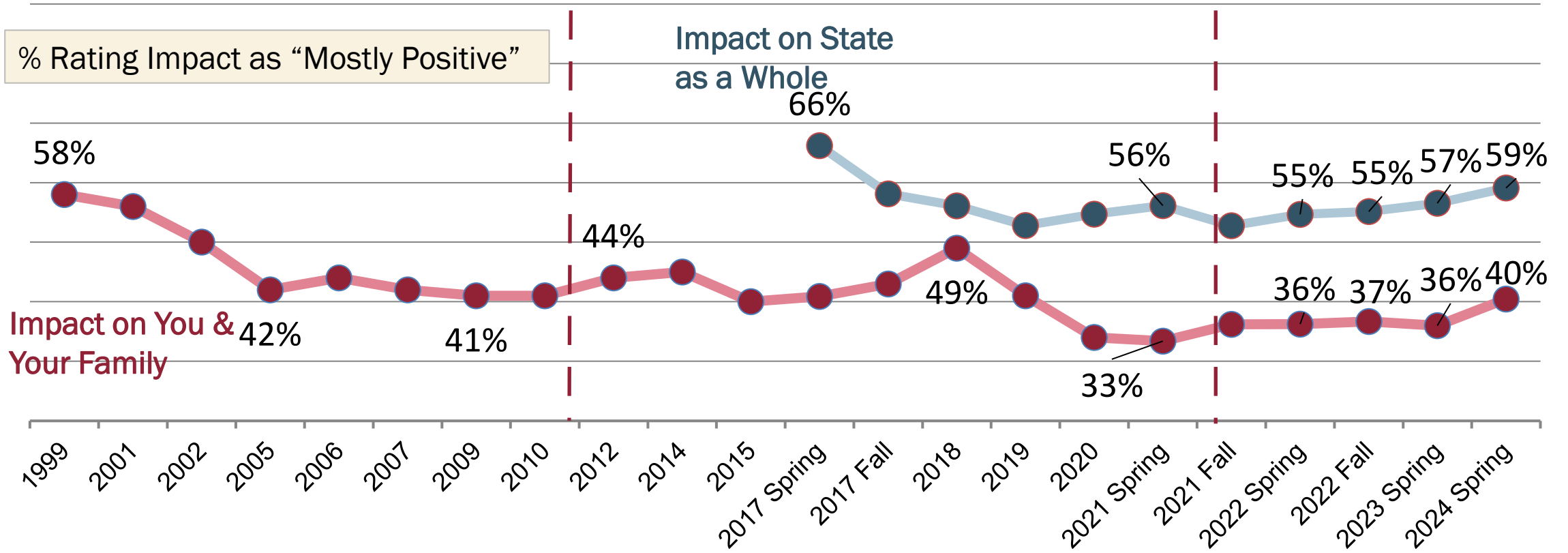
Opportunities for Improving Opinion of Tourism (Spring 2024)

(According to residents **not** favorable toward tourism in Hawai'i)



Base: Spring 2024 (579); Spring 2023 (623)
 Q6a. You said that you do not have a favorable opinion of tourism.
 What would it take to improve your opinion? Anything else?

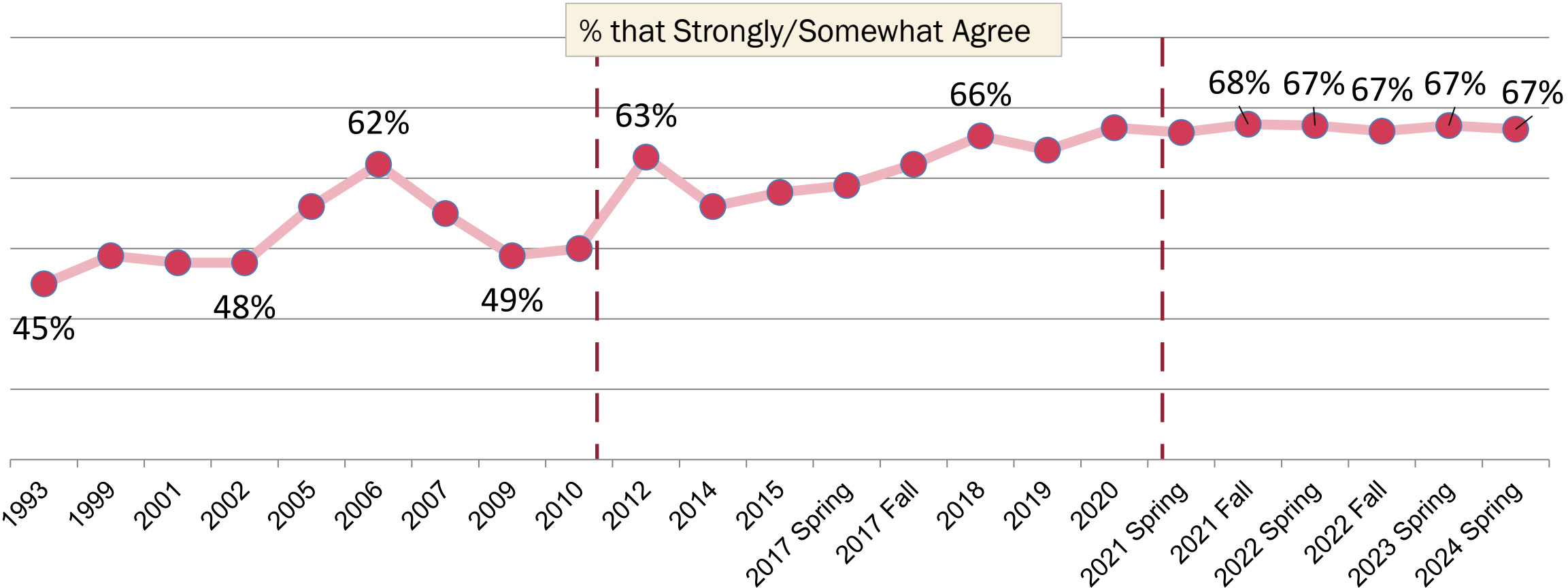
Mostly Positive “Impact of Tourism” sentiment climbing



Q2b. 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/you and your family?

Note: % saying Tourism has been “mostly positive” for you and your family defined as Rating of 7 to 10 on 10-point scale.

“This Island is being run for tourists at the expense of local people” steady

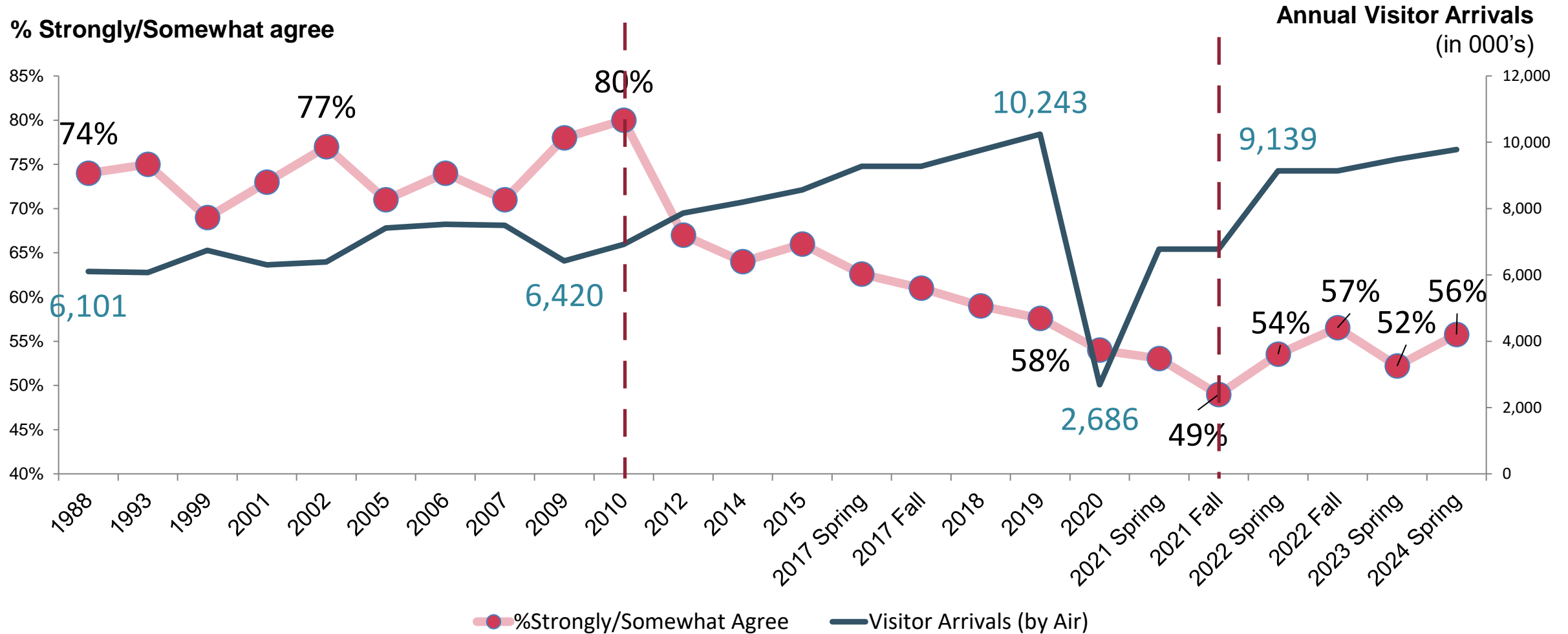


Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?
 Note: % that Strongly/Somewhat Agree defined as Rating of 6 to 10 on 10-point scale.



The perceived balance of tourism's benefits vs. challenges gains strength

“Tourism has brought more benefits than problems” rises

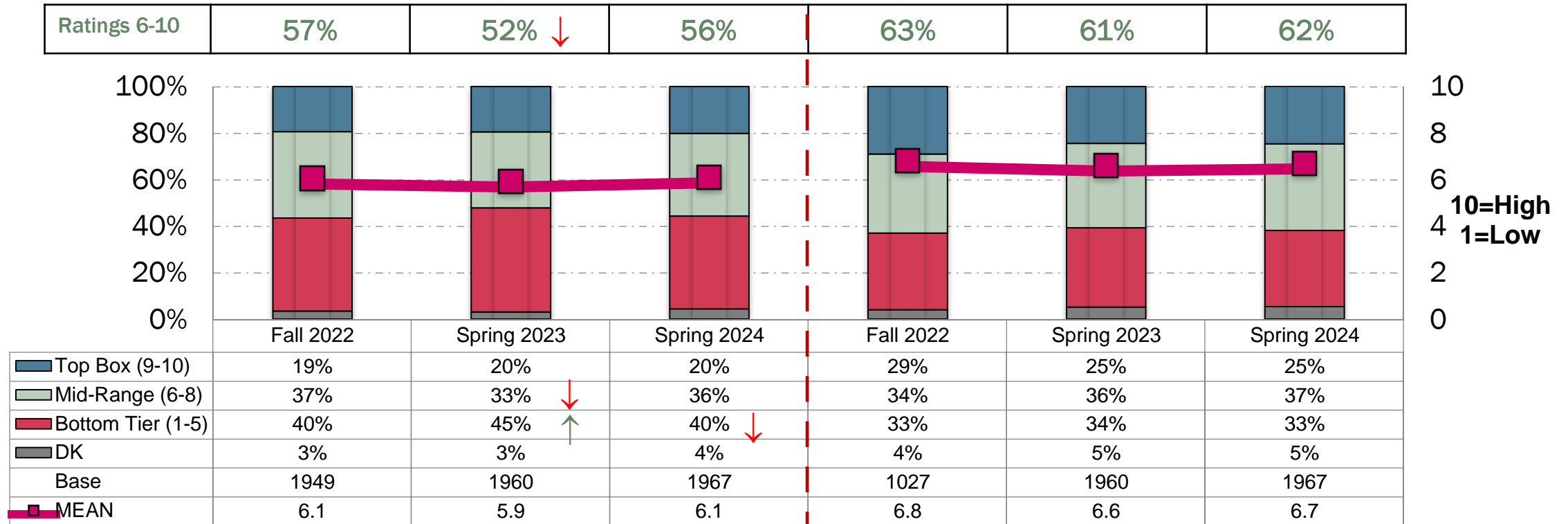


Q.4. How much do you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.
 Note: % that Strongly/Somewhat Agree defined as Rating of 6 to 10 on 10-point scale.

Balance: Benefits vs. Problems, Is Tourism Worth the Issues?

Tourism has brought more benefits than problems

Tourism is worth the issues associated with the industry



Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each 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.

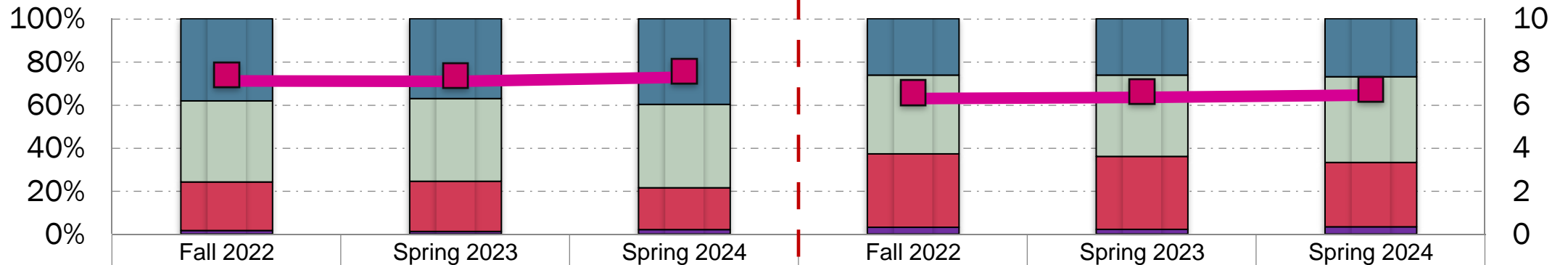
Q.3. In 2023, visitors spent nearly \$21 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, using the scale below, is tourism worth the issues associated with the industry? [Scale of 1 to 10, with 10 being Definitely Worth the Issues and 1 meaning Definitely Not Worth the Issues.]

Balance: Economic Impact Indicators

Creates job opportunities for residents

Creates job opportunities with paths for advancement

Ratings 6-10	76%	75%	79%	63%	64%	67%
--------------	-----	-----	-----	-----	-----	-----



	Fall 2022	Spring 2023	Spring 2024	Fall 2022	Spring 2023	Spring 2024
Top Box (9-10)	38%	37%	40%	26%	26%	27%
Mid-Range (6-8)	38%	38%	39%	37%	38%	40%
Bottom Tier (1-5)	23%	23%	19%	34%	34%	30%
DK/Rf	2%	1%	2%	3%	2%	3%
Base	1949	1960	1967	1949	1960	1967
MEAN	7.4	7.4	7.5	6.6	6.6	6.7

10
8
6
4
2
0
10=High
1=Low

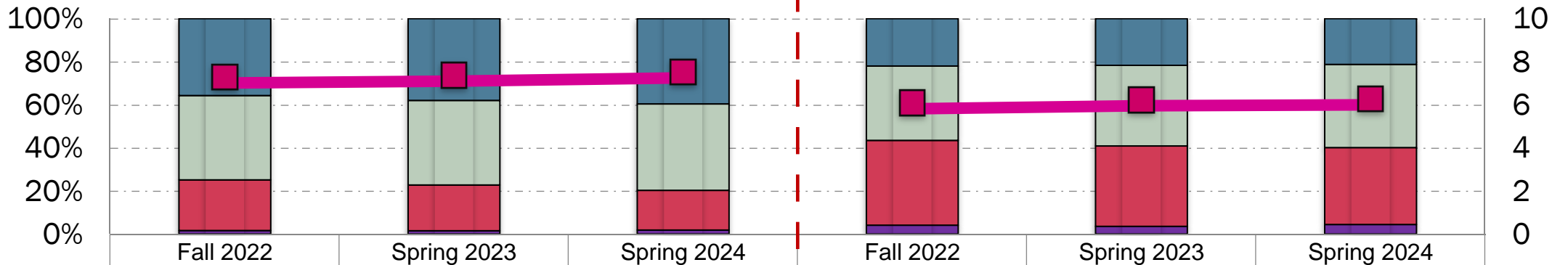
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Economic Impact Indicators (continued)

Supports our local businesses like retail, dining, etc.

Supports other industries important to residents like agriculture

Ratings 6-10	75%	77%	80%	57%	59%	60%
--------------	-----	-----	-----	-----	-----	-----



	Fall 2022	Spring 2023	Spring 2024	Fall 2022	Spring 2023	Spring 2024
Top Box (9-10)	36%	38%	40%	22%	22%	21%
Mid-Range (6-8)	39%	39%	40%	35%	37%	39%
Bottom Tier (1-5)	24%	21%	18%	39%	37%	36%
DK/Rf	2%	1%	2%	4%	4%	4%
Base	1949	1960	1967	1949	1960	1967
MEAN	7.3	7.4	7.5	6.1	6.2	6.3

10
8
6
4
2
0
10=High
1=Low

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each 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.

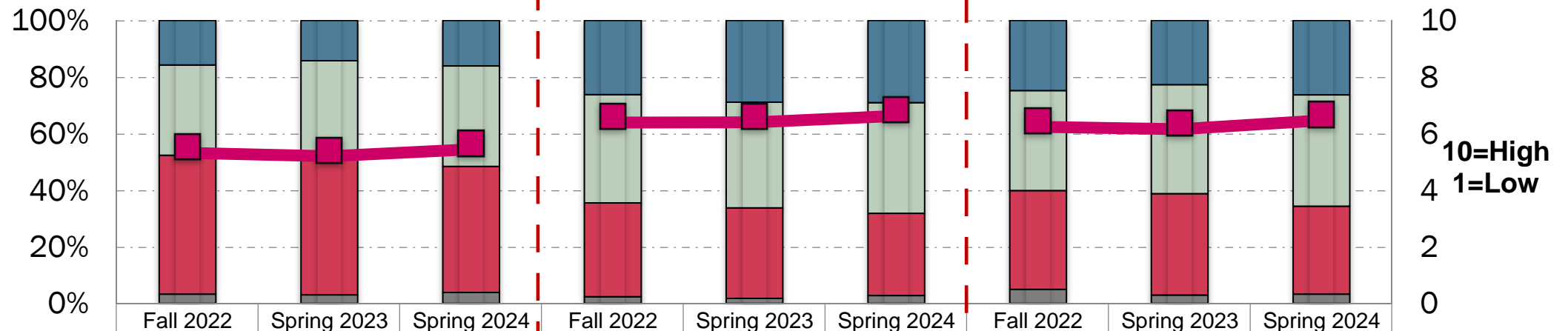
Balance: Quality of Life Indicators

Enhances residents' quality of life

Creates shopping, dining & entertainment opportunities

Supports festivals, activities & sports events for residents and visitors

Ratings 6-10	48%	47%	52%↑	64%	66%	68%	60%	61%	66%↑
--------------	-----	-----	------	-----	-----	-----	-----	-----	------



	Fall 2022	Spring 2023	Spring 2024	Fall 2022	Spring 2023	Spring 2024	Fall 2022	Spring 2023	Spring 2024
Top Box (9-10)	16%	14%	16%	26%	29%	29%	25%	23%	26%
Mid-Range (6-8)	32%	32%	36%	38%	37%	39%	35%	39%	39%
Bottom Tier (1-5)	49%	50%	45%	33%	32%	29%	35%	36%	31%
DK	3%	3%	4%	2%	2%	3%	5%	3%	3%
Base	1949	1960	1967	1949	1960	1967	1949	1960	1967
MEAN	5.5	5.4	5.7	6.6	6.6	6.8	6.5	6.4	6.7

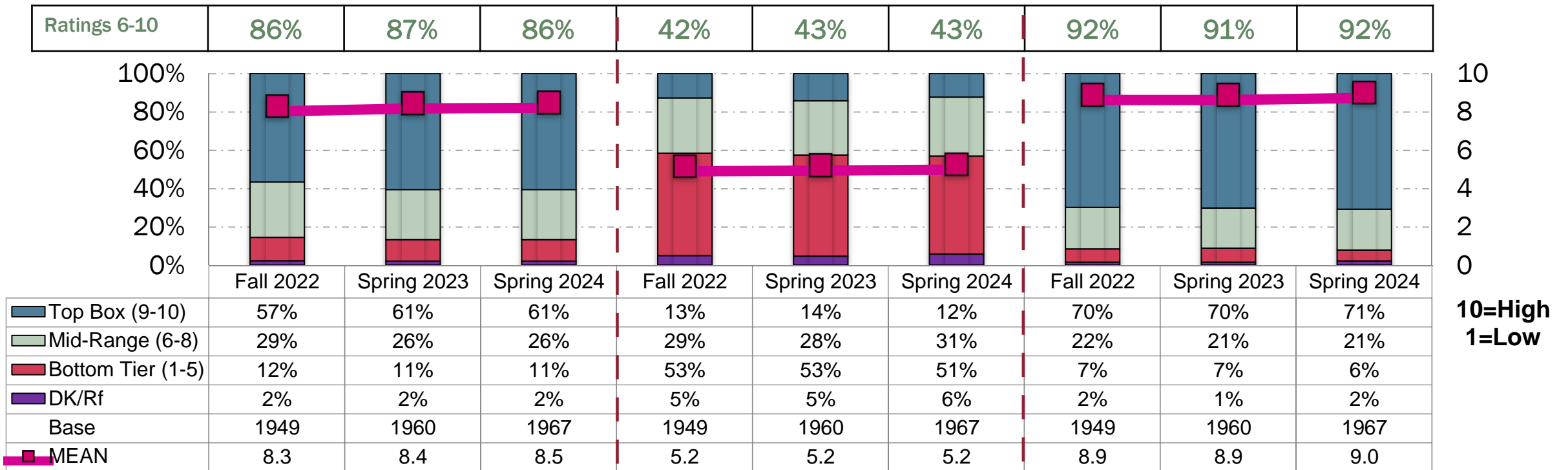
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Native Hawaiian Cultural & Sustainability Indicators

Authentic presentation of Native Hawaiian language and culture is important

Tourism contributes to the perpetuation of Native Hawaiian culture and language

Visitors need to be educated about protecting Hawai'i's natural environment and cultural resources.

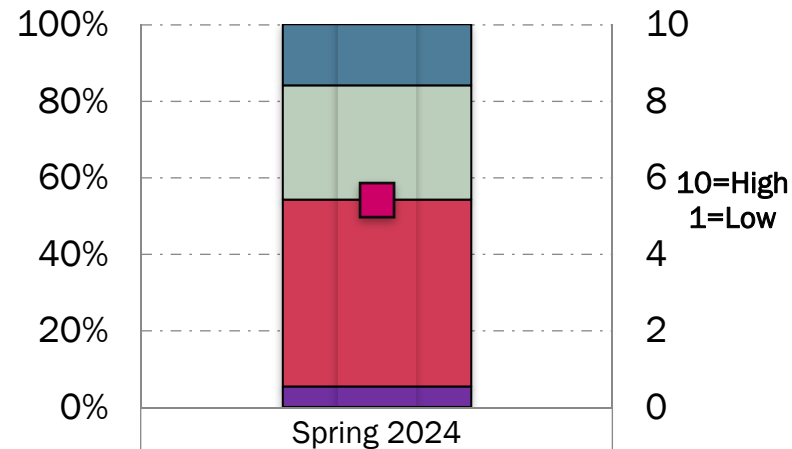


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Natural Resources & Safety (NEW indicators)

NEW: Tourism contributes to the improvement and maintenance of natural resources in the community

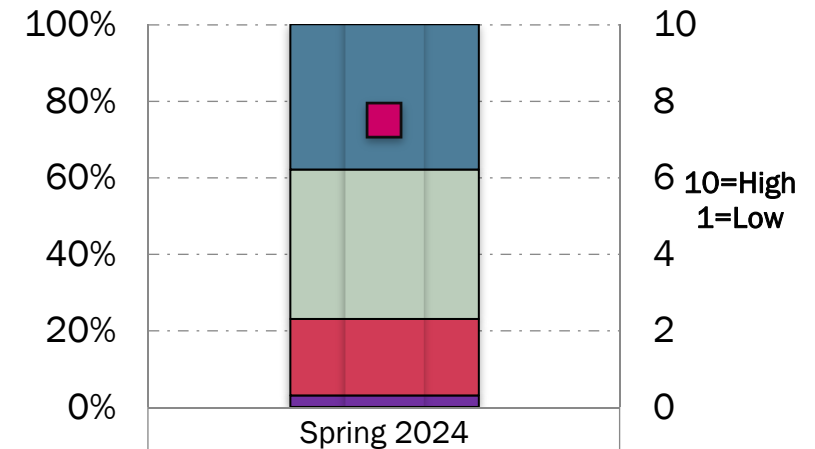
Ratings 6-10: 46%



Top Box (9-10)	16%
Mid-Range (6-8)	30%
Bottom Tier (1-5)	49%
DK/Rf	5%
Base	1967
MEAN	5.4

NEW: I feel safe when I travel to visitor destinations in Hawai'i

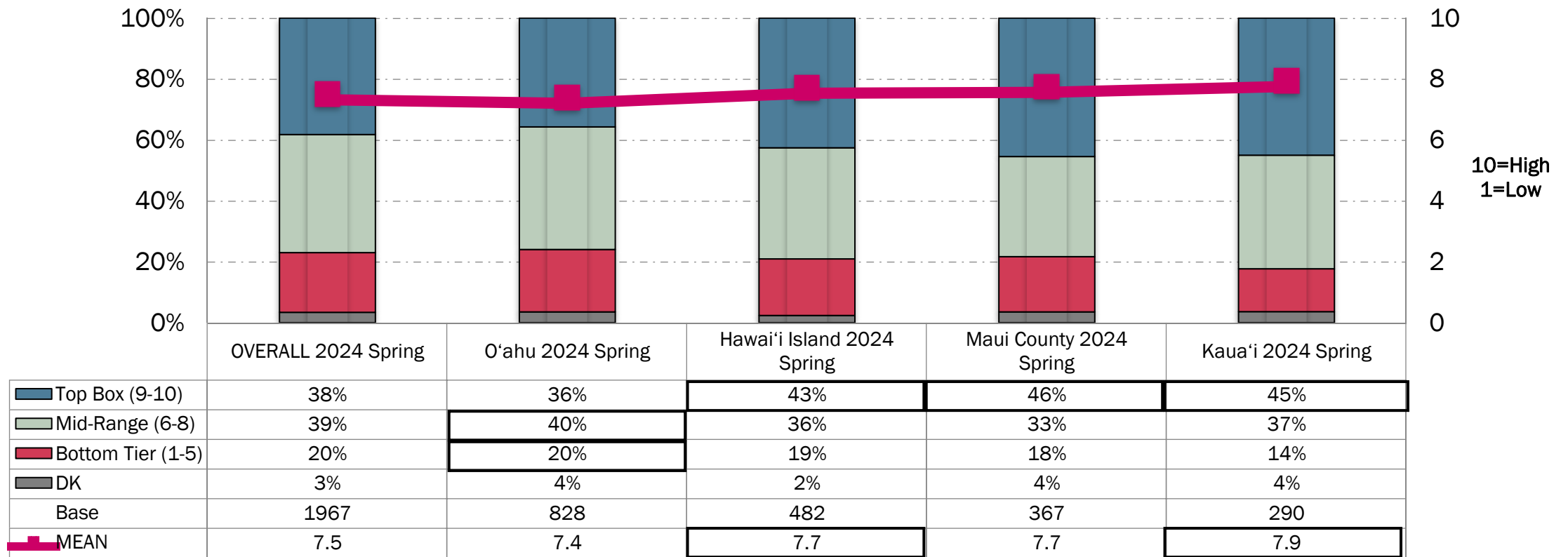
Ratings 6-10: 66%



Top Box (9-10)	38%
Mid-Range (6-8)	39%
Bottom Tier (1-5)	20%
DK/Rf	3%
Base	1967
MEAN	7.5

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each 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.

NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – *By County*

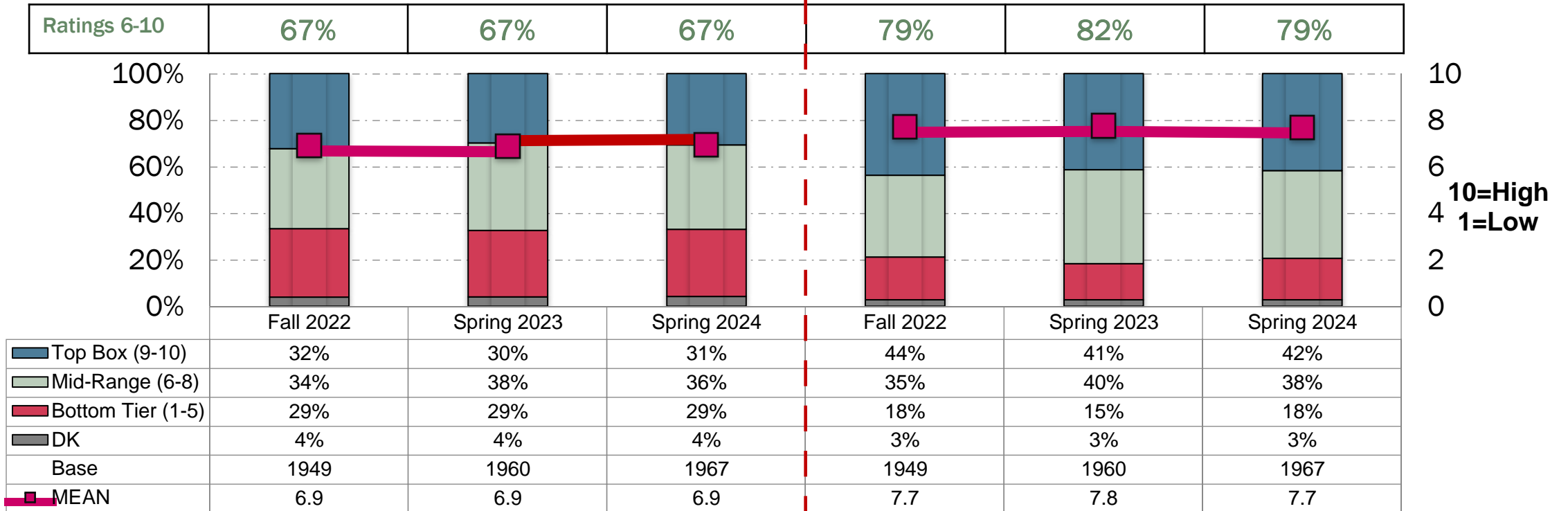


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Challenges of Tourism Indicators

Island is run for tourists at expense of local people

Island economy is too dependent on tourism



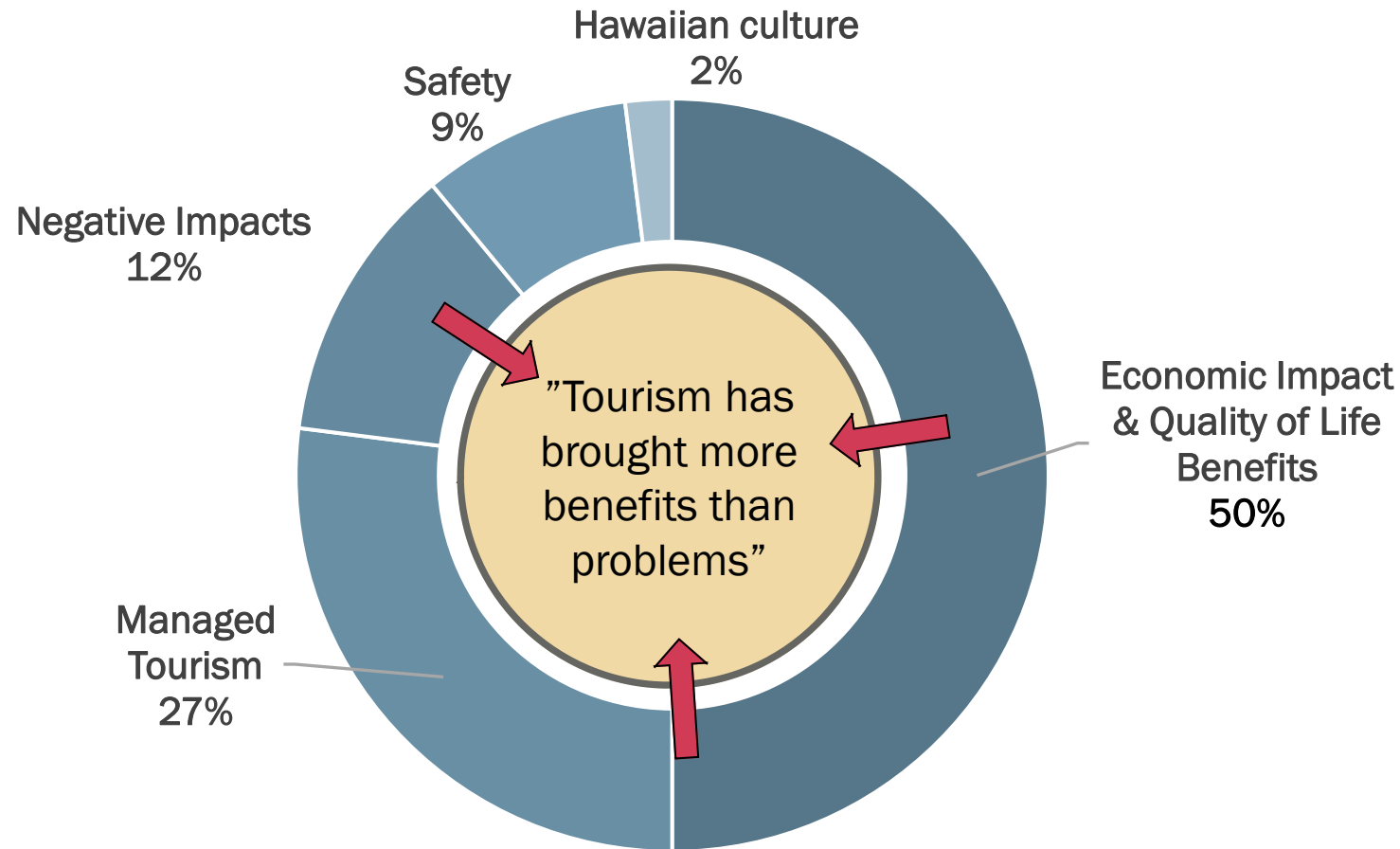
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



Providing residents a voice in tourism development takes on a new level of importance

Economic/Quality of Life Benefits + Tourism Management = Resident Sentiment

Drivers of Resident Sentiment – Spring 2024



Providing Residents a Voice in Tourism Development Integral to Managed Tourism

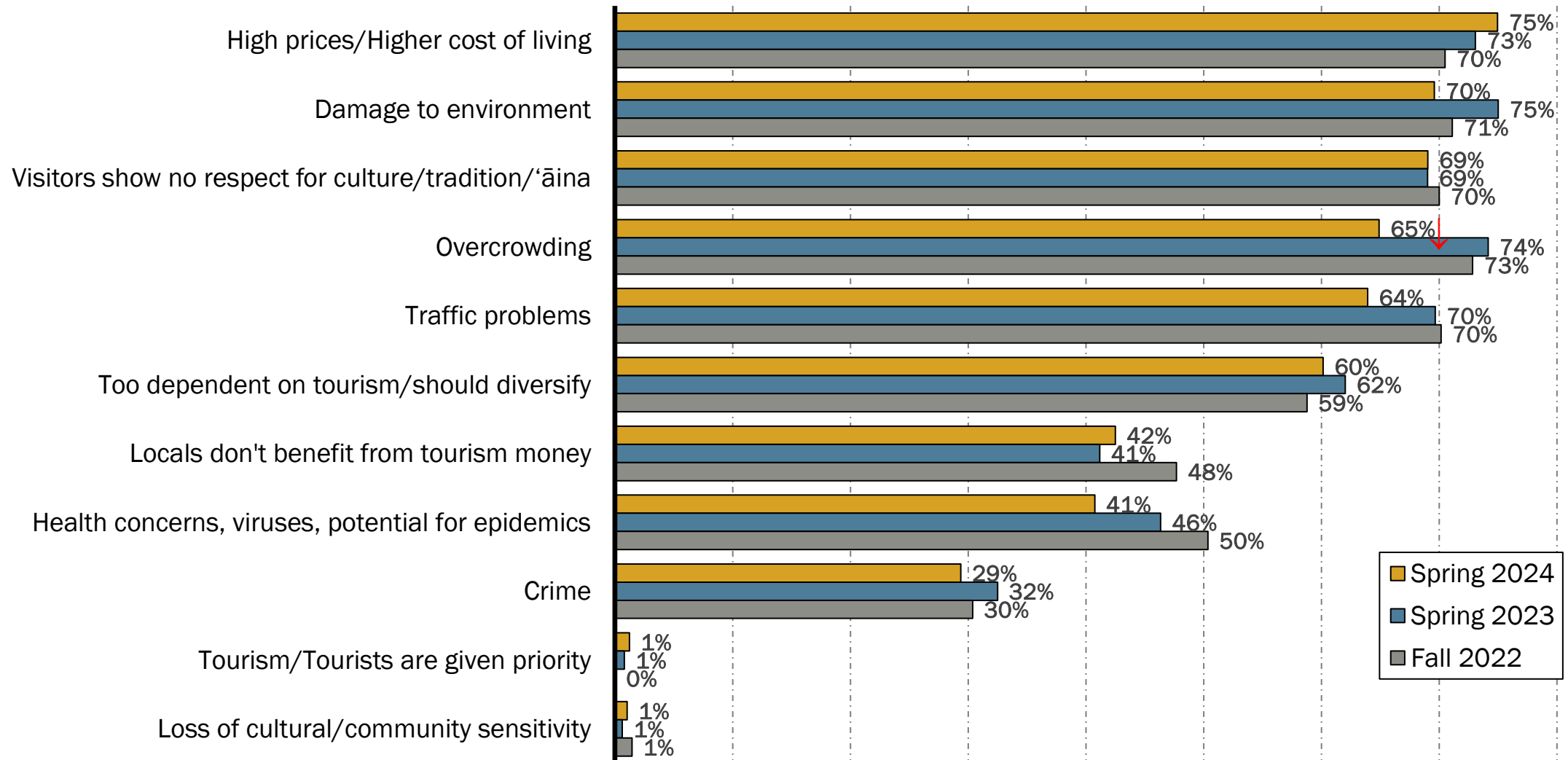
Having a Voice in tourism development decisions has re-emerged as the single, top individual driver of resident sentiment.

Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits (50%)	Supports local businesses	11%
	Creates job opportunities for residents	11%
	Supports festivals, activities & sports events for residents & visitors	10%
	Creates shopping, restaurants and entertainment opportunities for residents	8%
	Should be actively encouraged on my island	4%
	Is an industry that enhances residents' quality of life	3%
	Creates jobs opportunities with paths for advancement	2%
	Supports other industries like agriculture and technology	1%
Managed Tourism (27%)	I have a voice in my island's tourism development decisions	15%
	Contributes to the perpetuation of Native Hawaiian culture and language	7%
	More effort is being made to balance economic benefits of tourism and quality of life for residents	5%
	Tourism is being better managed on my island	0%
	Contributes to improvement and maintenance of natural resources in my community	0%
Negative Impacts (12%)	My island's economy is too dependent on tourism	7%
	This island is being run for tourists at the expense of local people	5%
Safety (9%)	I feel safe when I travel to visitor destinations in Hawai'i	9%
Hawaii Culture (2%)	Authentic presentation of Native Hawaiian language and culture	1%
	Educate visitors about protecting Hawaii's natural environment & cultural resources	1%



Perceived challenges of tourism remain, and require an integrated effort between multiple public and private sector organizations

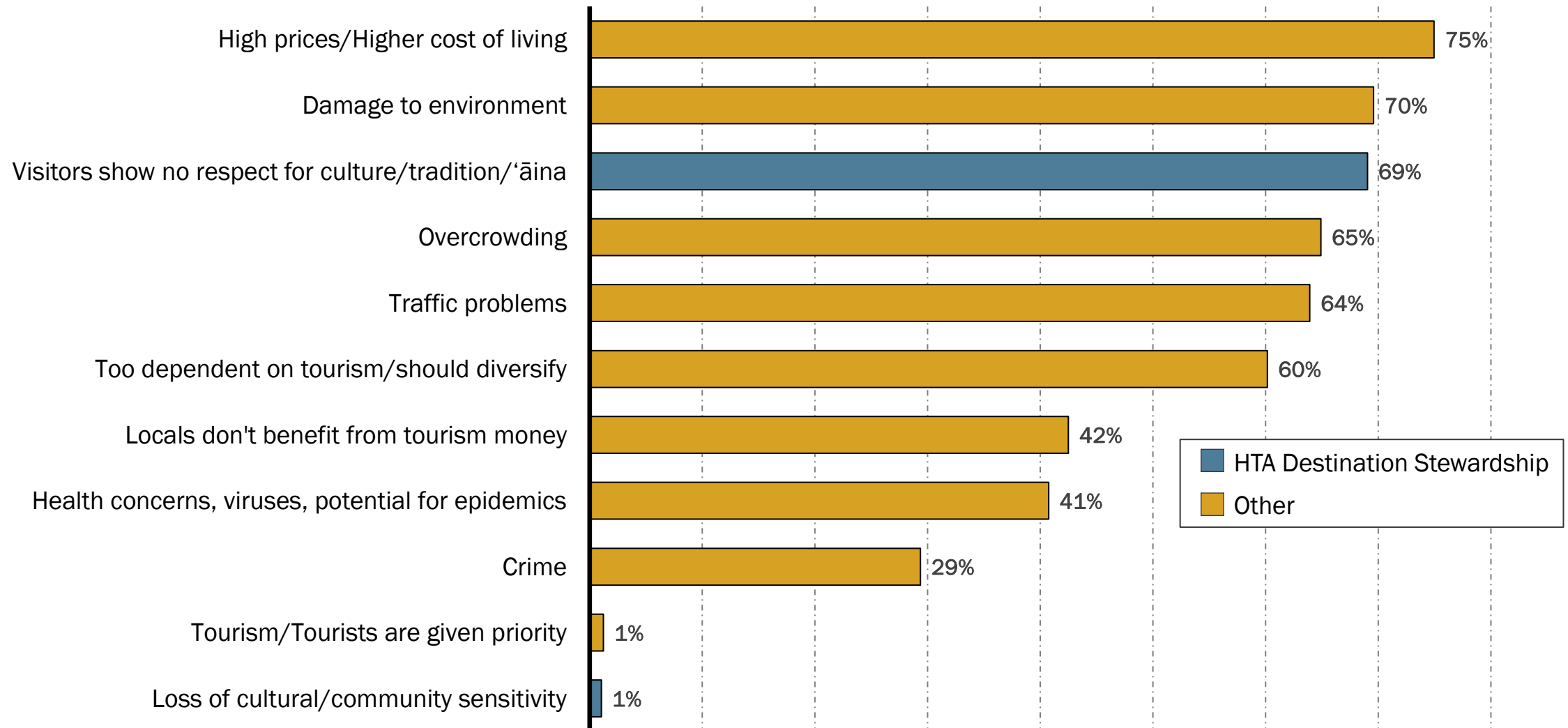
Among residents who say Hawai'i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Fall 2022 (871), Spring 2023 (902), Spring 2024 (821)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i? (i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

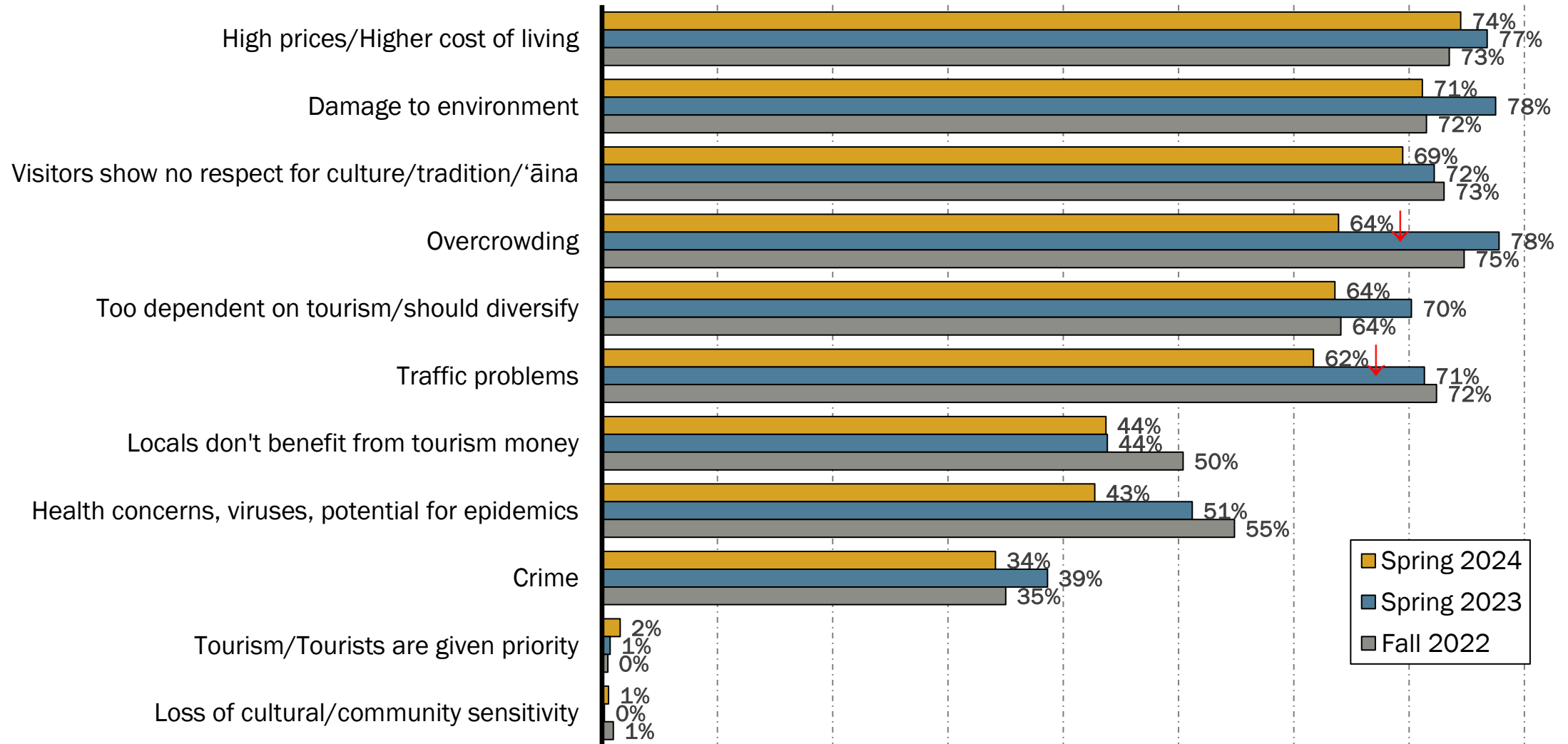
Among residents who say Hawai'i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Spring 2024 (821)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i?
(i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

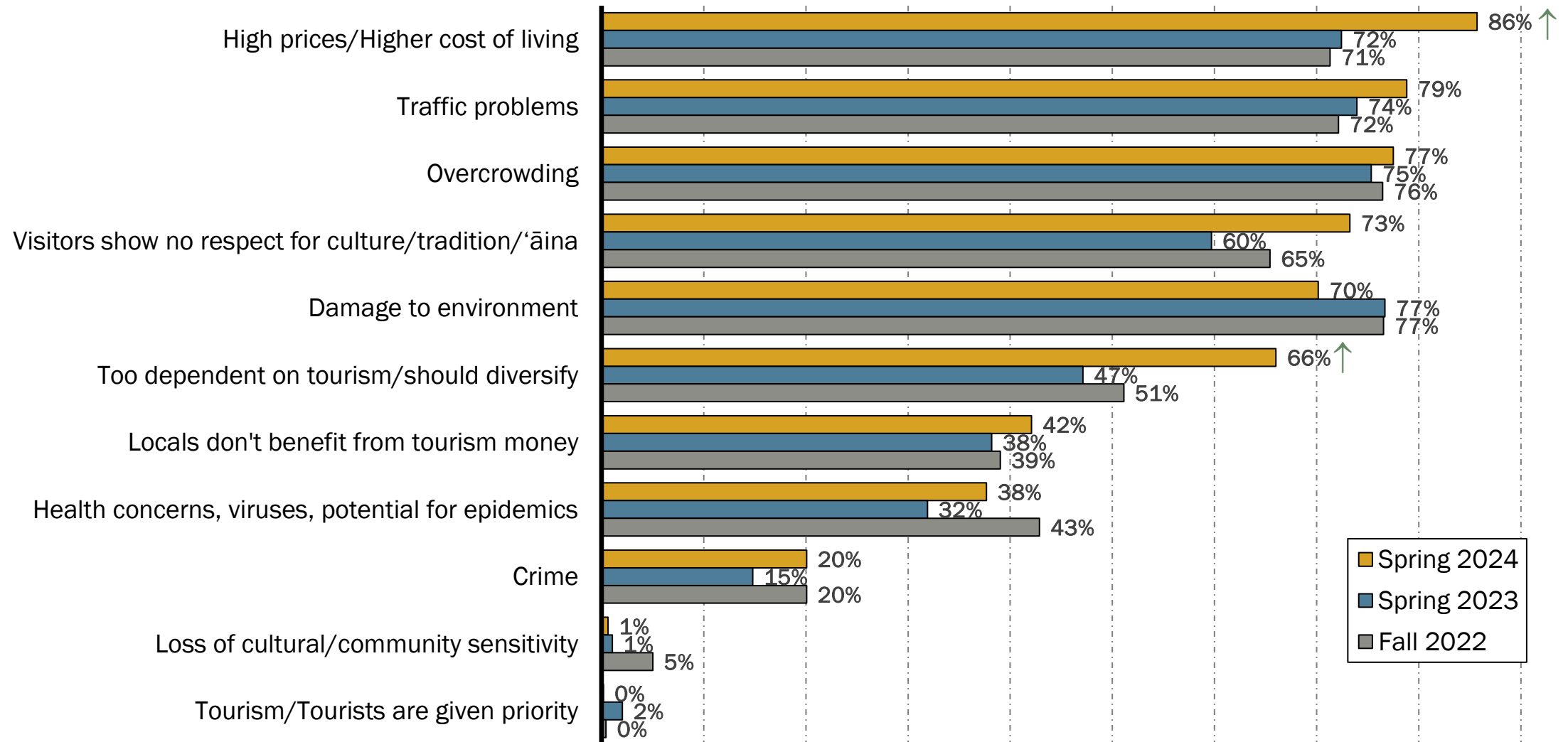
Among O‘ahu residents who say Hawai‘i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Fall 2022 (335), Spring 2023 (376), Spring 2024 (328)

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i? (i.e., According to residents saying Hawai‘i tourism creates more problems than benefits).

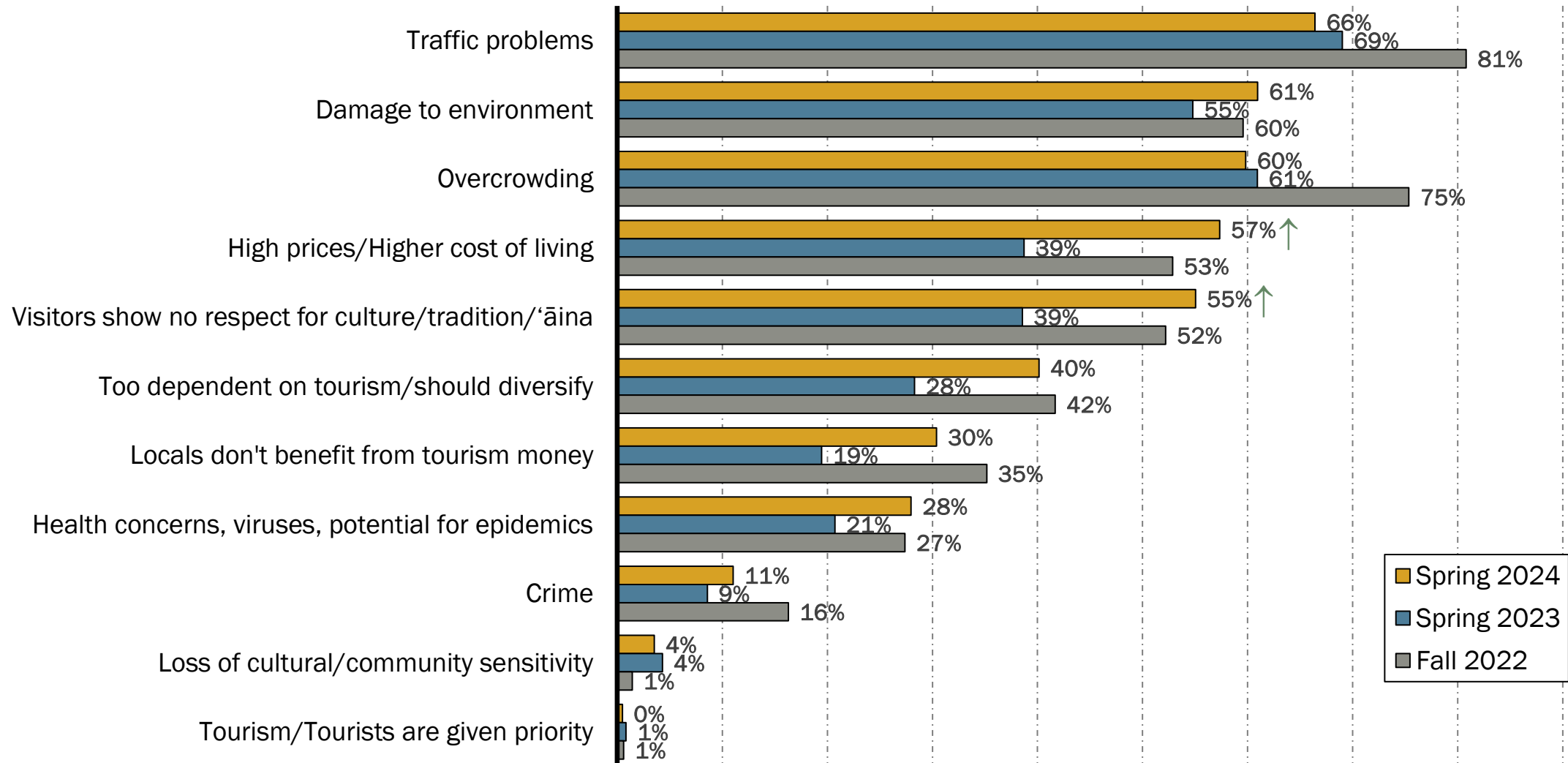
Among Maui County residents who say Hawai'i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Fall 2022 (180), Spring 2023 (178), Spring 2024 (170)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i? (i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

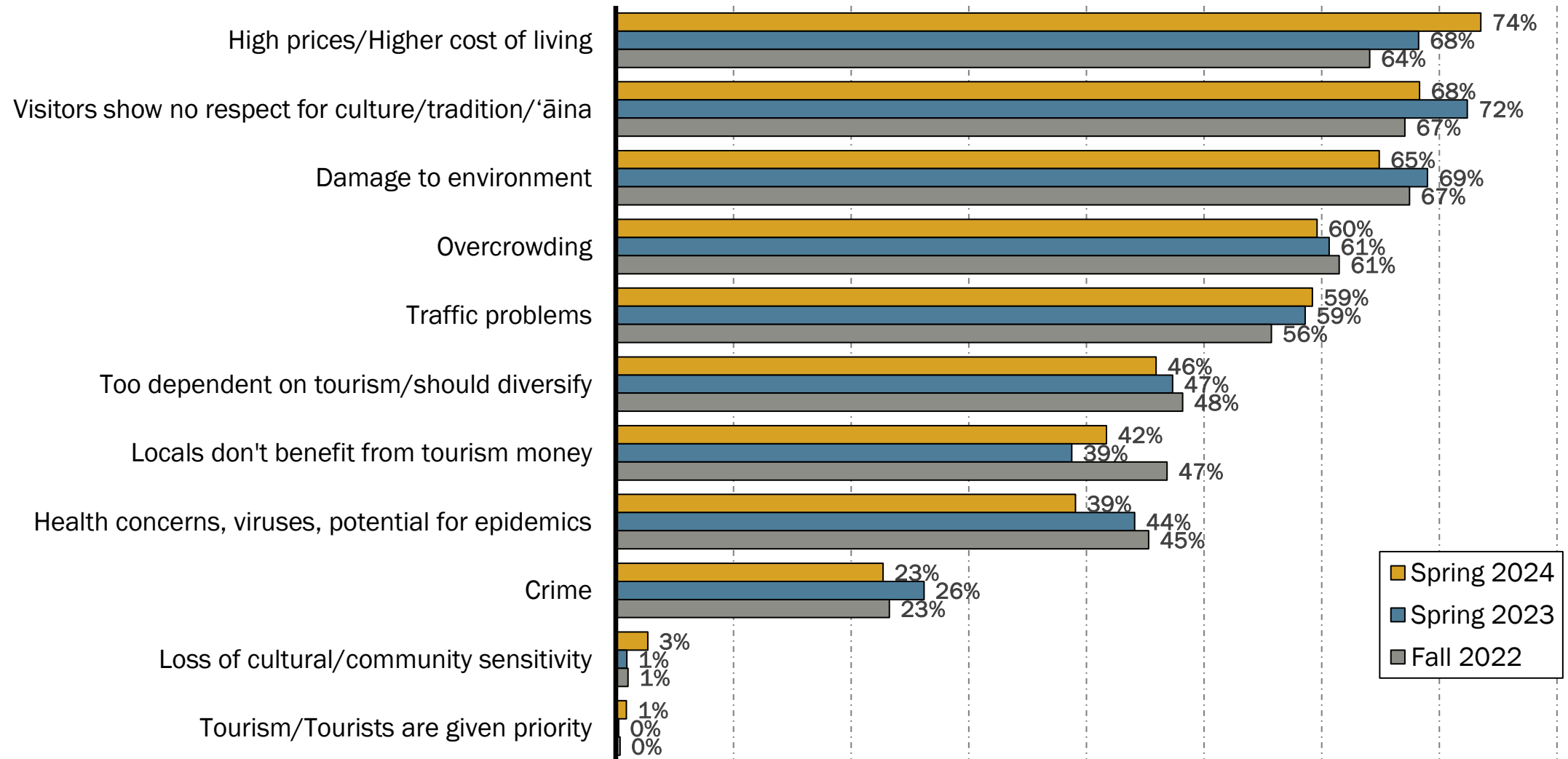
Among Kaua‘i residents who say Hawai‘i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Fall 2022 (148), Spring 2023 (132), Spring 2024 (123)

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i? (i.e., According to residents saying Hawai‘i tourism creates more problems than benefits).

Among Hawai'i Island residents who say Hawai'i tourism creates more problems than benefits, the perceived problems created by tourism are:



Base: Fall 2022 (208), Spring 2023 (216), Spring 2024 (200)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i? (i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

Awareness of HTA Destination Stewardship Initiatives

Are you aware that the HTA is working on.....?

		Statewide	O'ahu	Hawai'i Island	Maui County	Kaua'i
<i>Percent of residents aware of at least one HTA Destination Stewardship initiative</i>	Spring 2024	58%	59%	57%	58%	56%
	Spring 2023	59%	60%	54%	61%	52%

Awareness of Destination Stewardship initiatives positively impacts Resident Sentiment

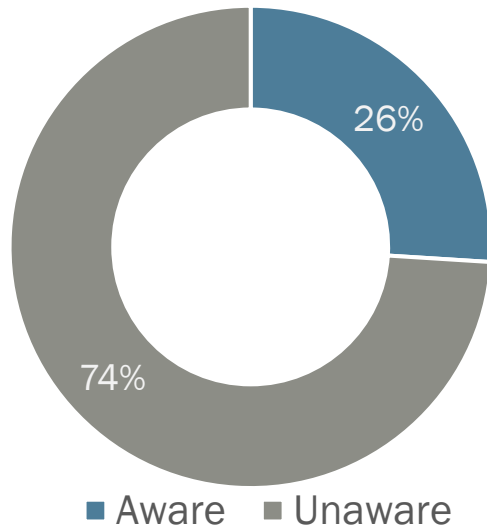
Mean Score	Aware	Unaware
<i>Perceived impact of tourism on you and your family</i>	6.8	5.7
<i>Tourism is being better managed on my island</i>	6.2	4.8
<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.1	4.9

Q10A. Are you aware that the HTA is working on.....? Base: Spring 2024 (1967); Spring 2023 (1960)

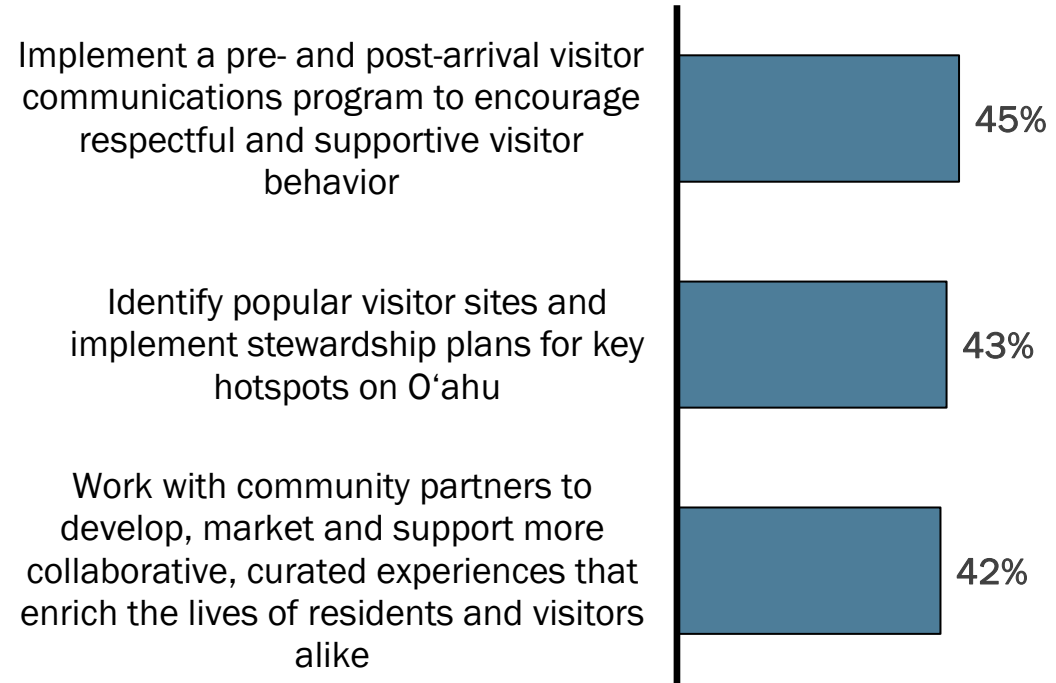
Destination Management Action Plans Awareness: O‘ahu

% Aware of HTA Destination Management Action Plans

▲ 1-point improvement from Spring 2023



ALL O‘ahu residents: 59% are aware of at least one initiative



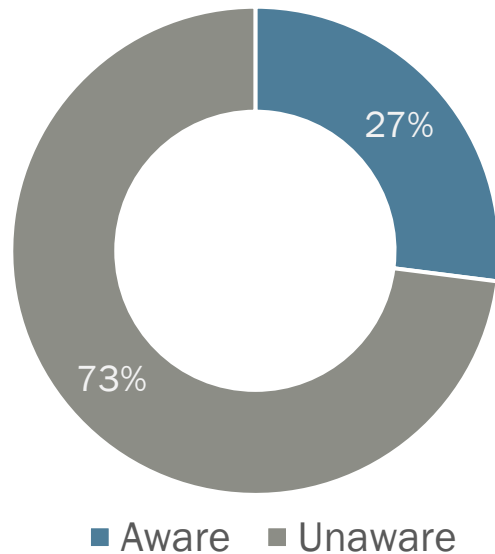
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state? (Base: 828)

Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 828)

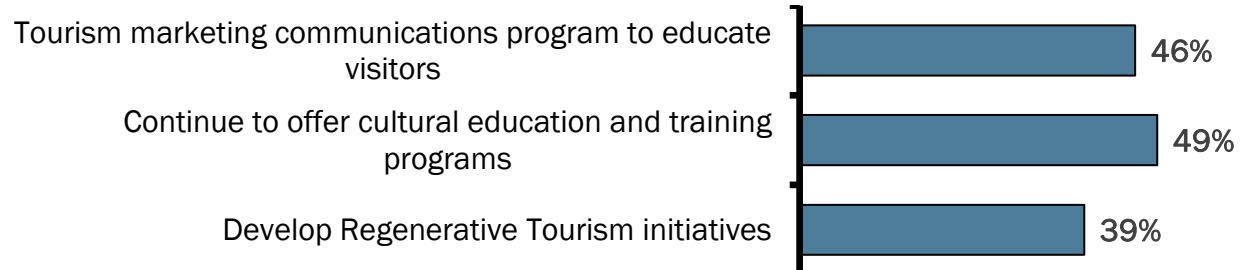
Destination Management Action Plans Awareness: Maui County

% Aware of HTA Destination Management Action Plans

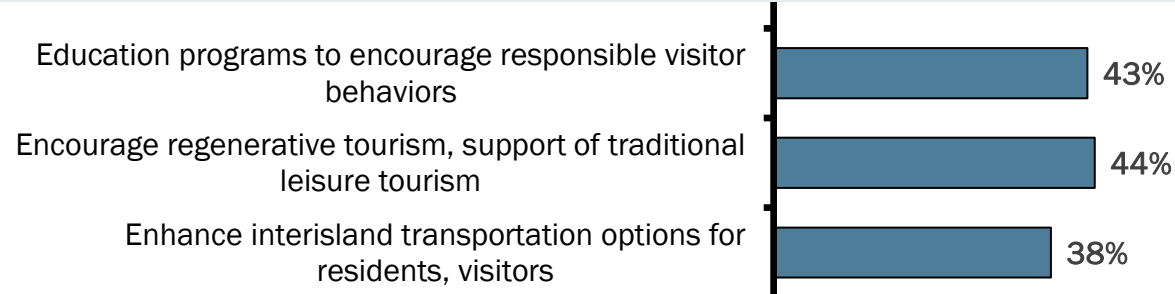
▼ 9-point decline from Spring 2023



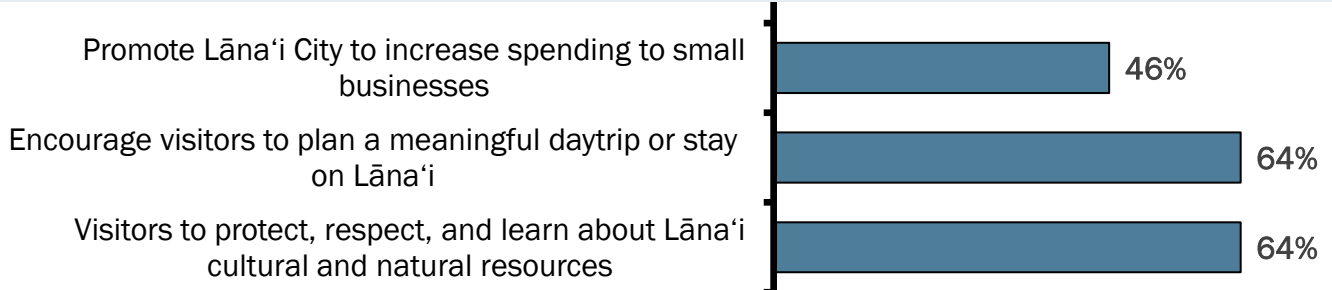
ALL Maui residents: 58% aware of at least one initiative



ALL Moloka'i residents: 48% aware of at least one initiative



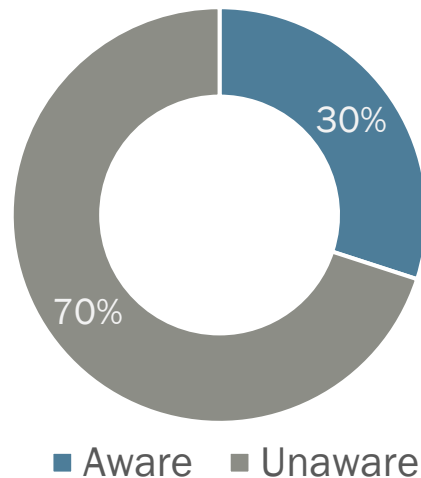
ALL Lāna'i residents: 64% aware of at least one initiative



Destination Management Action Plans Awareness: Kaua'i

% Aware of HTA Destination Management Action Plans

▲ 7-point improvement from Fall 2022



ALL Kaua'i residents: 56% aware of at least one plan

Focus policy efforts on appropriate behavior that will instill value in both visitors and residents for our natural and cultural resources

44%

Focus policies that address overtourism by managing people while on Kaua'i

34%

Develop educational materials for visitors and new residents to have respect for our local cultural values

46%

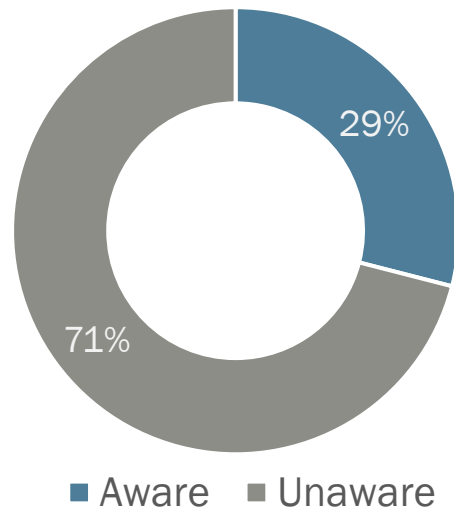
Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 290)

Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 290)

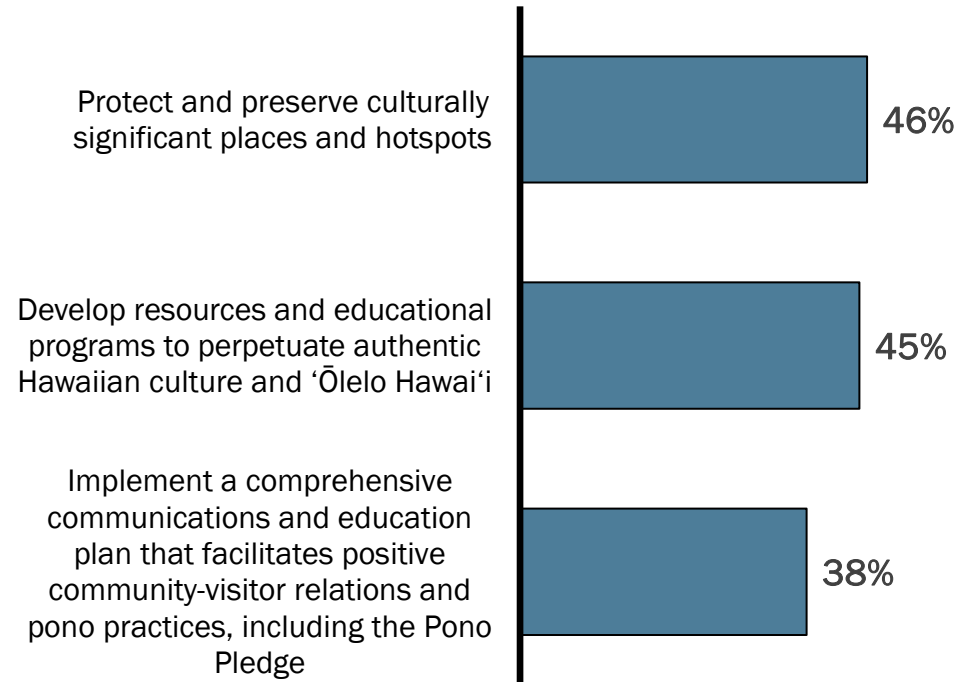
Destination Management Action Plans Awareness: Hawai'i Island

% Aware of HTA Destination Management Action Plans

▲ 4-point improvement from Spring 2023



ALL Hawai'i Island residents: 57% aware of at least one initiative



Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 482)

Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 482)



Mahalo from the Omnitrak Group



Appendices

A: Background Information

B: Key Sentiment Indicators

C: Changes in Drivers of Resident Sentiment



Appendix A: Background Information: Research Objectives, Sample Plan & Methodology

Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state's economy overall.
- The Resident Sentiment Survey (RSS) has been conducted 22 times since 1999, and the current survey was conducted by Omnitrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai'i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.

Statistical Analysis – Within the reports' graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. islands or attributes) in the same year at the 95% level of confidence.

An arrow  or  indicates a statistically significant difference when ratings are compared across years at the 95% confidence level.

Sample Plan and Methodology

Sample Plan

Omnitrak used a region-based stratified sampling for the study, the same approach used in earlier Resident Sentiment Survey efforts conducted by Omnitrak. The sampling plan divided the State into 12 sub-regions with consideration to population proportion, and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionately to population distribution per the latest State Census from the State Department of Business, Economic Development & Tourism.

Statewide sampling produced a total of $n = 1967$ respondents as follows:

- O'ahu: 828
- Hawai'i Island: 482
- Maui Island: 321, Moloka'i: 37, Lāna'i: 9
- Kaua'i: 290

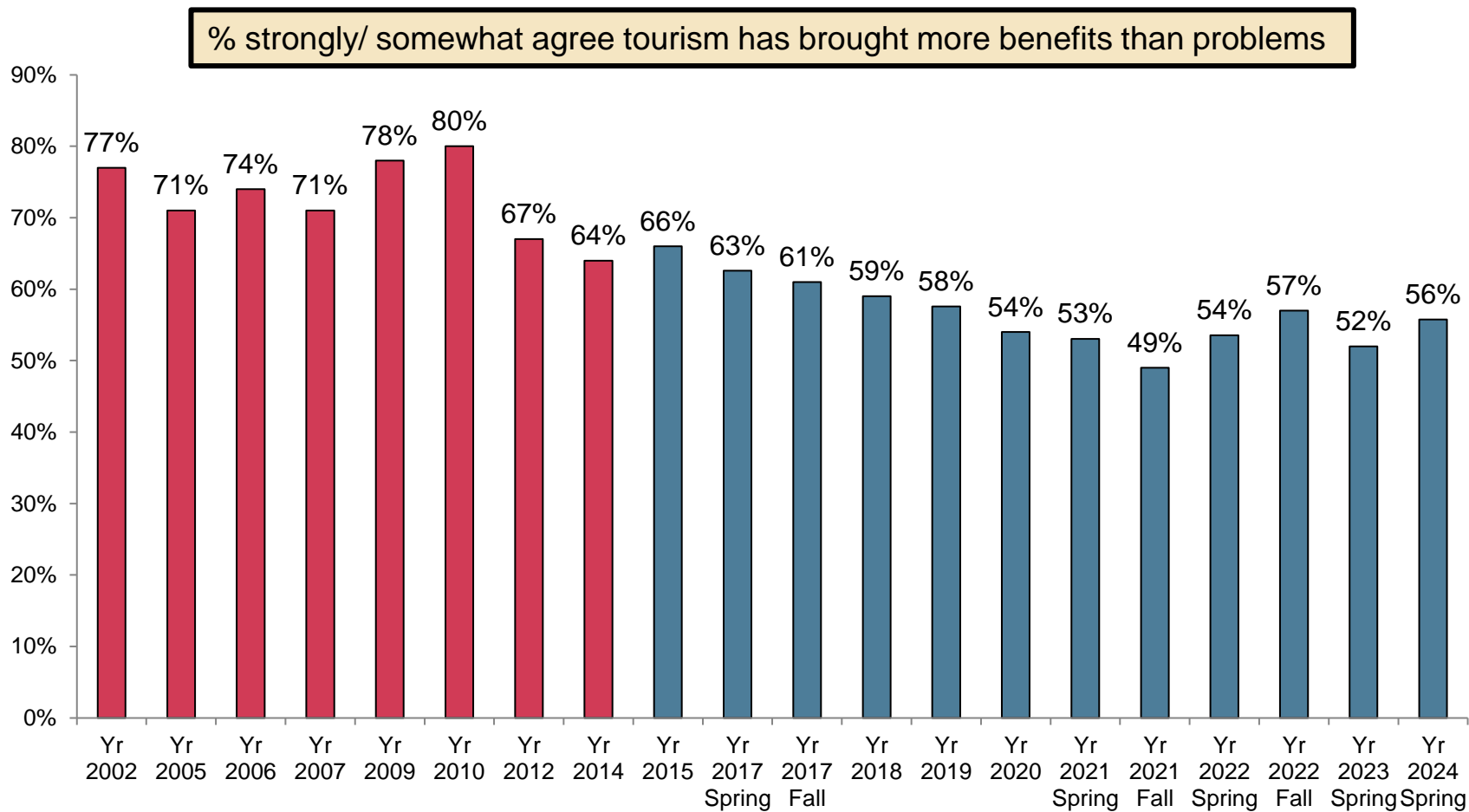
Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 25%) and online surveys (75%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: March 5 through April 30, 2024



Appendix B: Key Sentiment Indicators

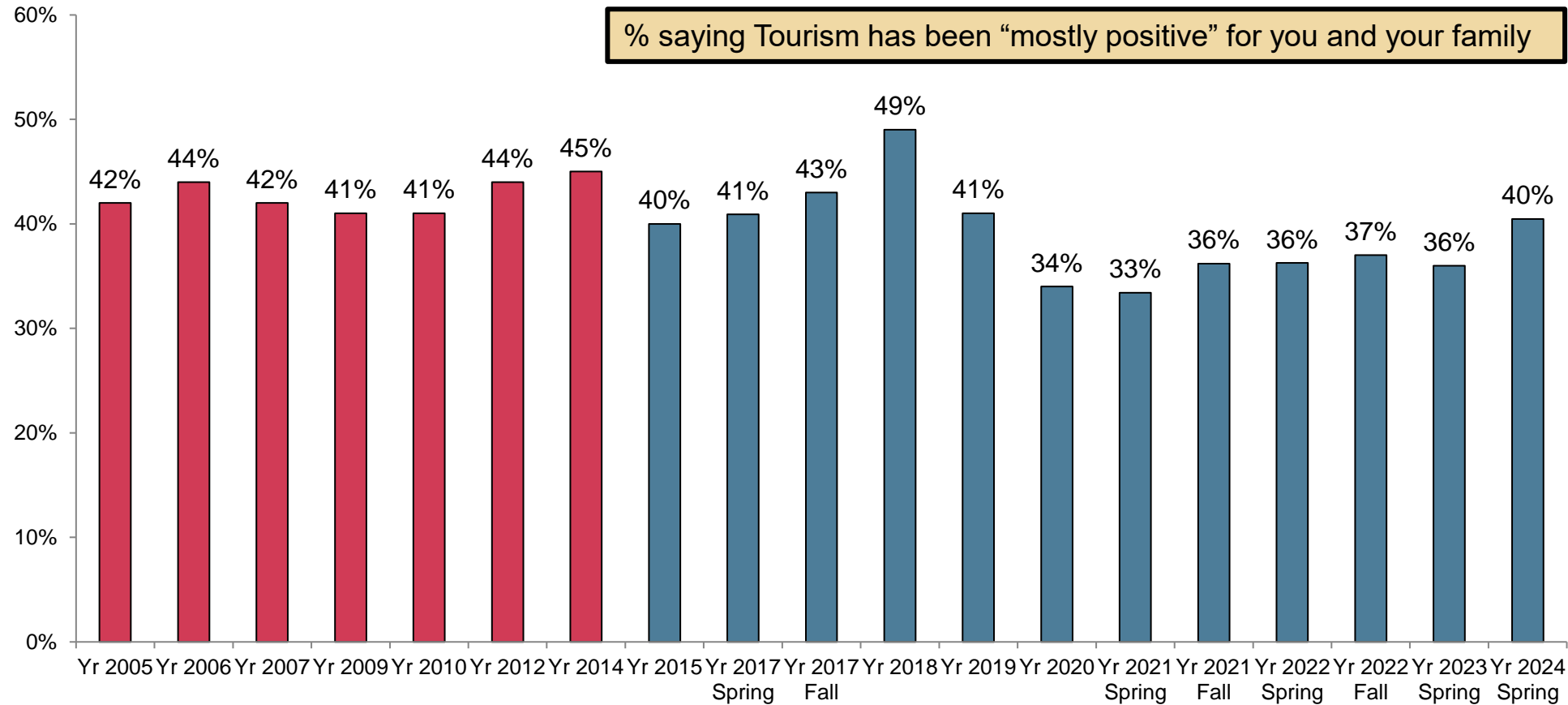
“Tourism has brought more benefits than problems” – *Overall Trend*



In order to track the data (change in rating scale) from 2009, a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Impact of Tourism on You & Your Family – *Overall Trend*

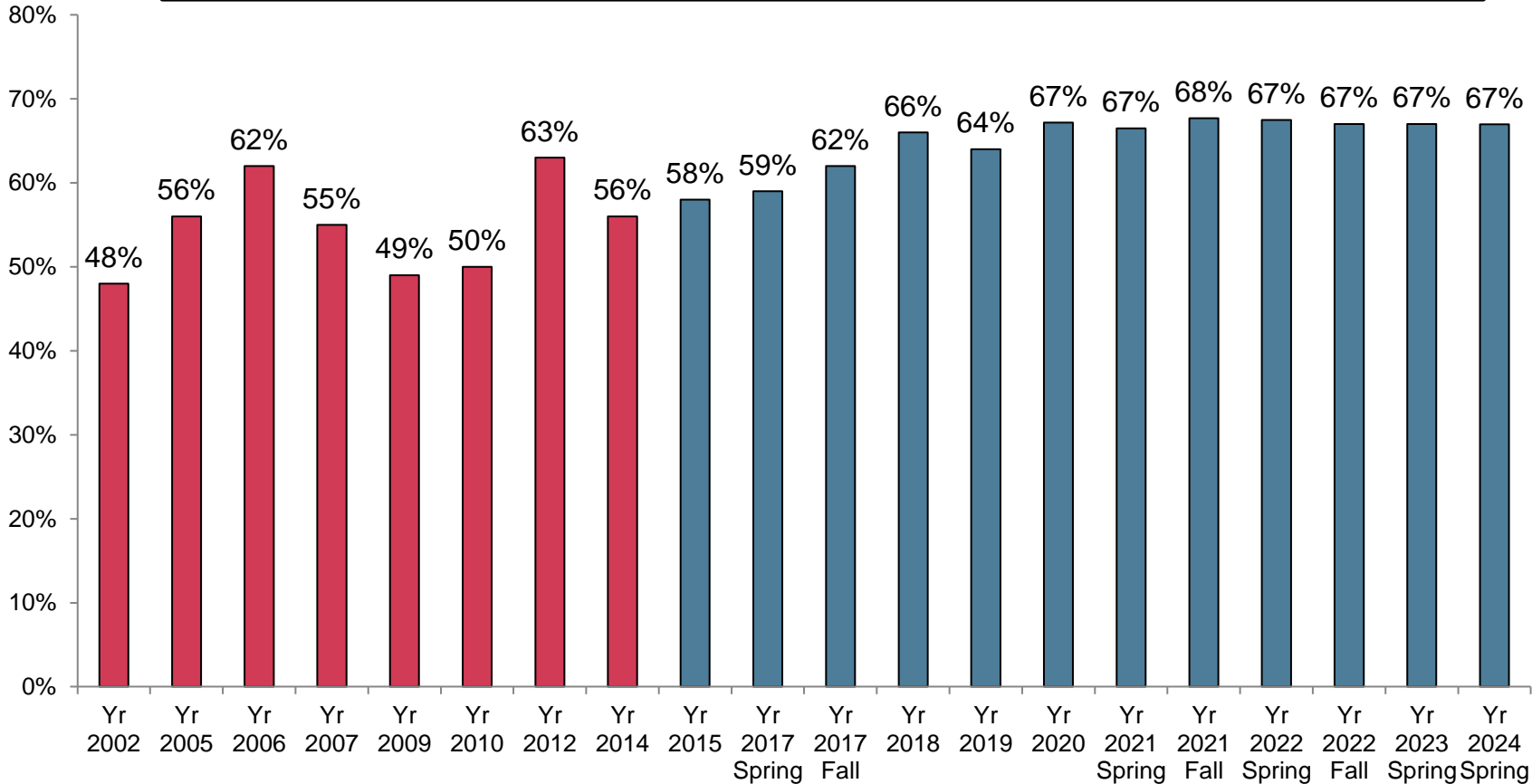


In order to track the data (change in rating scale) from 2009, a rating of 7-10 was used to approximate the percent that felt positively about this statement.

Q2b. 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?

“This island is being run for tourists at the expense of local people” - Overall

% strongly/ somewhat agree island is being run for tourists at expense of local people



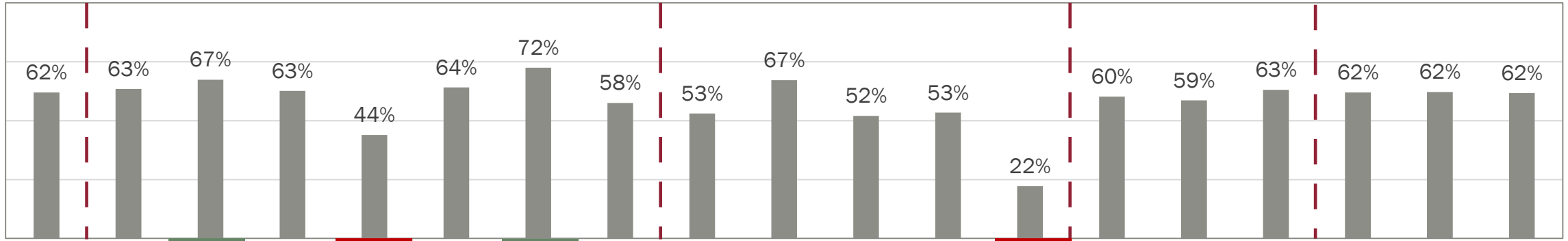
In order to track the data (change in rating scale) from 2009, a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

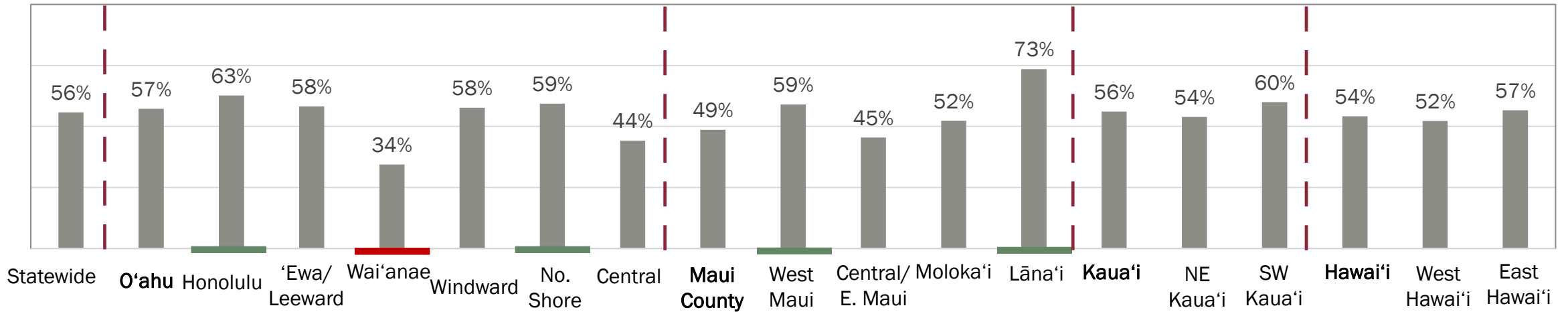
Executive Summary – Tourism is Worth the Issues, Benefits Outweigh Problems by Island/Area

At the community level, residents most critical of *Tourism being worth the issues associated with it* resided in Wai‘anae, while the North Shore of O‘ahu reversed and now shows positive support. On the other hand, Lāna‘i residents now show the weakest support on this particular measure.

“Tourism is worth the issues associated with it” (Rating 6-10)



“Tourism has brought more benefits than problems” (Rating 6-10)



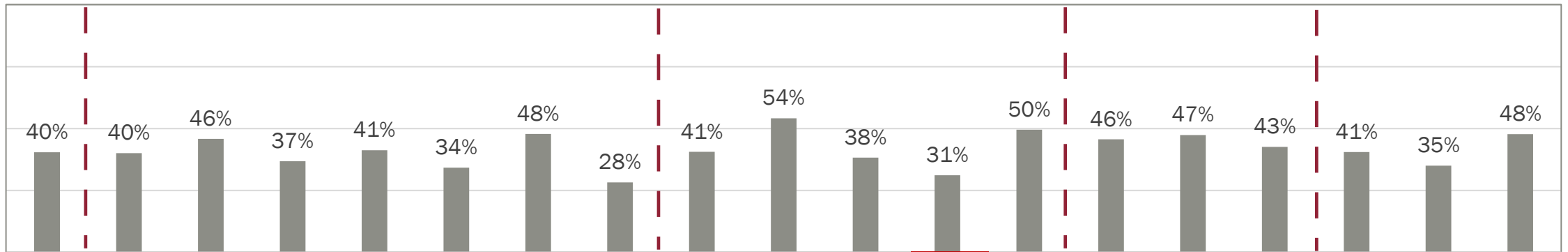
Q3. In 2023, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Q4. I’m going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.

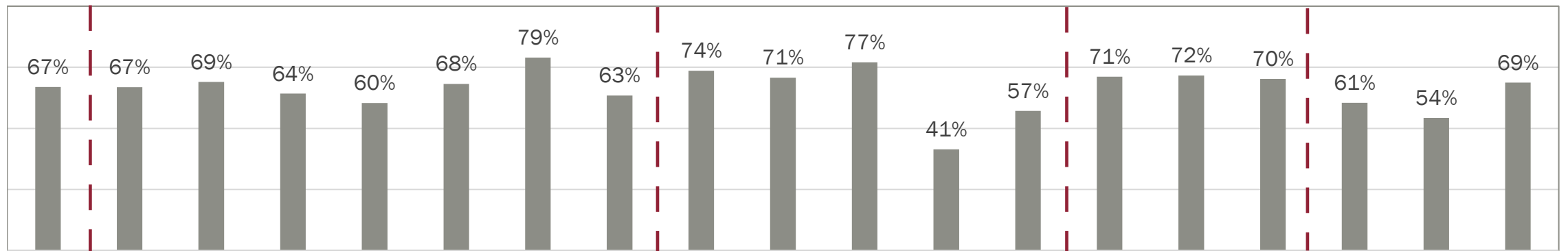
Key Indicators by Island/Area (continued)

At the community level, residents least likely to feel that *Tourism is mostly positive for their family* reside in the Central, Windward, and 'Ewa/Leeward areas of O'ahu and on Moloka'i.

"Tourism has been 'mostly positive' for you and your family" (Rating 7-10)



"This island is being run for tourists at the expense of local people" (Rating 6-10)



Statewide O'ahu Honolulu 'Ewa/Leeward Wai'anae Windward No. Shore Central Maui County West Maui Central/E. Maui Moloka'i Lāna'i Kaua'i NE Kaua'i SW Kaua'i Hawai'i West Hawai'i East Hawai'i

Q2a/b. 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?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.



Appendix C: Changes in Drivers of Resident Sentiment

Changes in Drivers of Resident Sentiment

Drivers of Resident Sentiment

