



**HAWAI‘I ISLAND
TOURISM STRATEGIC PLAN
2006-2015**

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I. Executive Summary

The *Hawai'i Island Tourism Strategic Plan: 2006-2015 (Hawai'i Island TSP)* reflects the desires and input of Hawai'i Island tourism stakeholders including residents, state and county representatives, and individuals in both public and private sectors. Helping to oversee development of the plan throughout the 15-month process was the Hawai'i Island Tourism Strategic Plan Advisory Committee, whose members also represented a broad range of tourism stakeholders from various communities on the island.

Based on collective feedback obtained throughout the planning process, ensuring a high quality of life for residents was a key issue. The county and its residents strongly believe that if Hawai'i Island is a good place to live, it will also be a good place for people to visit. As a major industry affecting the island, the visitor industry is also expected to contribute in a positive manner to the quality of life for residents. This balanced approach is reflected in Hawai'i Island's vision for tourism:

Tourism on Hawai'i Island will:

- Honor the people and heritage of Hawai'i Island;
- Support and enhance the quality of life for residents;
- Value and perpetuate the natural and cultural resources of Hawai'i Island;
- Engender mutual respect and partnership among all stakeholders, including future generations;
- Support a vital and sustainable economy; and
- Provide a unique, memorable and enriching visitor experience.

To achieve this vision, this plan outlines how tourism stakeholders will strategically manage tourism on Hawai'i Island, in a sustainable manner, that promotes a high quality of life for residents, preservation of natural and cultural resources, quality experiences for visitors and economic growth for the County of Hawai'i. This commitment to the land and people of Hawai'i – *Ola ka 'Āina, Ola ke Kānaka!* (Healthy Land, Healthy People) was embraced by Hawai'i Island tourism stakeholders and filters throughout the objectives and strategies in the Hawai'i Island TSP.

As the state's youngest and largest island, Hawai'i Island – promoted as Hawai'i's Big Island of Adventure – is faced with unique opportunities and challenges related to tourism, and ensuring a good quality of life for its residents and businesses.

Challenges

- The island's large geographical size creates challenges including distancing its resident workforce from employment centers and supporting infrastructure over a larger area. Examples include two and three hour one-way commutes for many visitor industry workers, and roadways and harbors are at maximum capacity.
- Visitor accommodations for Hawai'i Island are primarily located along the west coast from Kona to Kohala. This concentration of properties creates traffic issues for west side residents of the island, who feel the negative impact of the growth in visitors more so than other areas of the island.
- At the present time, Hawai'i Island hotels and resorts are able to accommodate additional visitors during shoulder periods throughout the year. However, if visitor arrivals continue to increase at their current pace, capacity will be reached within the foreseeable future, and there are no new resort developments with zoning approval.
- The majority of hotel properties in east Hawai'i are older properties requiring renovation and upgrades to be able to attract more visitors to this side of the island.

Opportunities

- The sheer size of Hawai'i Island creates the greatest variety and number of natural experiences in the state including active volcanoes, rain forests, and black sand beaches.
- Of all the Hawaiian Islands, Hawai'i Island can accommodate additional visitors during the slower periods during the year. Targeted marketing efforts, along with strategically planned festivals, events and activities, can be implemented to attract desired target markets to increase occupancy during these periods.
- Hawai'i Island is comprised of many special and distinct communities. Community-based development provides excellent opportunities to help generate economic activity island wide, while at the same time provides visitors with a greater number and variety of experiences to enjoy. Residents also benefit from expanded and enhanced local business opportunities, the ability to showcase their multi-cultural diversity, and contribute to their community's sense of place.
- Interest has been expressed that future development of visitor accommodations on the island take the form of smaller, more community-based type properties rather than large resorts. For example, learning centers with overnight accommodations in natural areas for the study of selected environments, Bed & Breakfasts, and hotels with fewer units that are more attuned to the community.
- Efforts are already underway to improve access to public transportation services that will contribute to an improved quality of life for residents and a better experience for visitors.

There are seven major objectives in this plan to achieve the goal and vision for tourism on Hawai'i Island. Each major objective is supported by key strategies, and each strategy has a supporting action plan (listed in a separate document) that will guide activities for plan completion over the next three years. The following are the seven objectives:

- To increase the economic contribution of the visitor industry to Hawai'i Island and its communities;
- To make positive contributions to the quality of life for residents, such as putting "community first," helping to ensure that communities retain their sense of place including recognizing their multi-cultural diversity, providing increased business opportunities, and providing workforce housing opportunities;
- To increase communication, interaction, and understanding between stakeholder groups, especially between residents and the visitor industry;
- To maintain and improve visitor satisfaction with their experience on Hawai'i Island;
- To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of our host culture;
- To support the enhancement and maintenance of the natural resources of Hawai'i Island; and
- To establish an oversight mechanism for ensuring plan implementation, including scorecard tracking, plan reviews and revisions as necessary.

Ultimately, the Hawai'i Island TSP establishes an overall direction for all tourism stakeholders to move forward in a coordinated and complementary path. To help ensure success, this plan must continue to be embraced and supported by residents, state and county governments, and all other tourism stakeholders for Hawai'i Island. Additionally, other plans and processes should also be integrated with the Hawai'i Island TSP to ensure consistency and progression towards achieving the tourism vision.

The Hawai'i Island Tourism Strategic Plan: 2006-2015 was completed before the October 15, 2006 earthquake that impacted the island. Understandably, county efforts will be foremost on rebuilding and restoring damaged areas and property, therefore, actions described in this plan may be implemented later than originally anticipated.

II. Introduction and Background

The Hawai'i Island Tourism Strategic Plan (Hawai'i TSP) reflects the hopes and aspirations of the many tourism stakeholder groups including residents, visitor industry representatives, businesses, and government. The values underlying the Hawai'i Island TSP resonate first in the vision, and then throughout the strategic plan, filtering through the goal, objectives, and strategies.

In developing this plan, it was clearly understood that for the visitor industry to be successful, the natural environment must be preserved and supported, and residents of the island must feel they have a good quality of life. Throughout the planning process, this strong commitment to the land and to the people of the island was maintained. This commitment is shown in the goal for this plan: *Ola ka 'Āina, Ola ke Kānaka!* (Healthy Land, Healthy People!). Focus first on the people and land of Hawai'i Island, keep it healthy and vibrant, and a sustainable visitor industry will follow. To achieve this will require finding a balance between all of the interests expressed in this plan. Plan implementation must be done in an integrated and balanced approach to achieve the vision for tourism in the County of Hawai'i.

A. Purpose of the Plan

This Hawai'i Island Tourism Strategic Plan:

- Reflects island knowledge and desires of Hawai'i Island tourism stakeholders, including visitor industry representatives, government officials, and community residents.
- Establishes overall direction for all visitor industry stakeholders to move forward in a coordinated and complementary path.
- Serves as a guide for county, state (including the Hawai'i Tourism Authority – HTA), and federal government decision makers in developing policy and advocating for and allocating resources to improve the visitor industry on Hawai'i Island.
- Will be integrated with other plans and processes to create opportunities for partnerships among government entities, visitor industry representatives, and communities.

B. State and County Plans

To ensure a vital, competitive, and sustainable visitor industry, benefiting both residents and visitors, a statewide tourism plan called the State Tourism Strategic Plan: 2005-2015 (State TSP) was developed with statewide community input. The statewide tourism plan, covering a 10-year time span from 2005 to 2015, identifies a shared vision for tourism for the State of Hawai'i. The State TSP identified the need for county-level tourism strategic plans. The development process for the county plans began during the summer of 2005 and was completed just over a year later.

C. Development Process

As part of the Hawai'i County planning process, the Honorable Mayor Harry Kim invited community members to actively participate on the Hawai'i Island TSP Advisory Committee to help draft the Hawai'i Island plan. This committee was comprised of individuals representing a broad range of visitor industry stakeholder groups. In addition, broader community input was obtained through island-wide outreach efforts.

A timeline of key events during the Hawai'i Island planning process is included in Appendix B. A summary of community input is included in Appendix C.

D. Implementation Framework

An oversight committee, convened by the Hawai'i County Department of Research and Development, will drive successful implementation of this plan. Members may include Hawai'i's Big Island Visitors Bureau and others to ensure the participation and support of stakeholders who have a role in this effort, and to encourage the involvement of the private sector, community organizations, residents, visitors, and other major stakeholders in the future of the visitor industry on Hawai'i Island. The role of the oversight committee will be to monitor plan performance, problem-solve and serve as a vehicle to network and share information and progress among key stakeholders. The monitoring of plan performance will also be a key part of the oversight process, including the collection, review, and development of scorecard measures toward meeting plan objectives.

II. Overview of Tourism

A. State Level

1. Historical Trends

The visitor industry has been the economic mainstay of Hawai'i since statehood in 1959. Despite periods of decline caused by global, national and local impacts, like the Persian Gulf War, weakened economies, Hurricane 'Iniki, the terrorist attacks of September 11, 2001 and other impacts, Hawai'i tourism rebounded mid-way in the 2000s and showed record numbers in 2005.

In 2005, the State Department of Business, Economic Development, and Tourism (DBEDT) reported nearly 7.5 million tourists visited the state and visitor expenditures totaled \$11.5 billion. At present, 2006 is on track to be another strong year with visitor arrivals through April up 2.1% over 2005, and visitor expenditures reaching \$3.8 billion.¹

Tourism touches nearly all aspects of life in Hawai'i and is the primary source of revenue for the community through visitor expenditures and tourism-related capital investment. As the chief generator of employment in the state, the visitor industry accounts for 22.3% of all Hawai'i jobs.²

2. Critical Issues Facing State Tourism

While tourism in the state is booming, new opportunities and challenges are emerging for Hawai'i residents and the visitor industry. Many of the opportunities and challenges are described in the State TSP and, as expected, are continuously evolving. Below are highlights of key issues in 2006:

- Finding a Sustainable Balance

Residents have said in community meetings that they welcome visitors, but that, foremost, the state needs to ensure Hawai'i remains a good place to live – that residents have a good quality of life. With an increasing resident population and record numbers of visitors, residents continually raise the sustainability question – how many residents and visitors can the state and each island support with infrastructure levels, natural resource constraints and resident tolerance. Equally important is finding ways to preserve and protect the native Hawaiian culture, the indigenous culture linked to the land of Hawai'i.

¹ DBEDT Monthly Visitor Statistics 2005 & April 2006

² State of Hawai'i Department of Labor and Industrial Relations

- Critical Components of a Healthy Industry

- *Adequate, Affordable Airlift*

To be able to travel to the islands, visitors need an adequate supply of air seats at prices they are willing to pay. A key concern is the reduction in the total number of air seats from Japan, which started in October 2005, due to lower demand. Additionally, the increased cost of oil will continue to affect ticket prices to destinations like Hawai'i that require longer flights.

- *Accommodations Capacity*

The total number of traditional hotel units is expected to increase only moderately between 2006 and 2010 with planned developments and improvements.³ With limited accommodations available statewide, Hawai'i must attract the right mix of visitors who can and will boost the economy by actively experiencing what the islands have to offer.

- *Visitor Satisfaction*

For years, Hawai'i has been a successful tourist destination. The challenge is in finding ways to keep the tourism product fresh and unique, even as other destinations are offering seemingly similar features. Additionally, the high demand for Hawai'i hotel rooms has resulted in average daily room rates (ADR) increasing 20% in two years, reaching an average \$167 statewide (Maui had the highest ADR at \$214).⁴ To combat "sticker shock" and exceed expectations, service levels and the quality of the visitor experience have been identified as being critically important.

- *A Sufficiently Numbered and Skilled Workforce*

The availability and quality of a visitor industry workforce is critical to delivering high service levels and maintaining visitor satisfaction. With Hawai'i unemployment hovering at or under 3% in 2006,⁵ increasing overall workforce readiness, providing training programs and attracting qualified workers to the visitor industry are key areas that need to be addressed.

³ Analysis of Trends in Accommodations Supply, with Focus on Condominium and Timeshare Conversions, Hospitality Advisors LLC, September 2005

⁴ DBEDT Monthly Visitor Statistics 2005, December

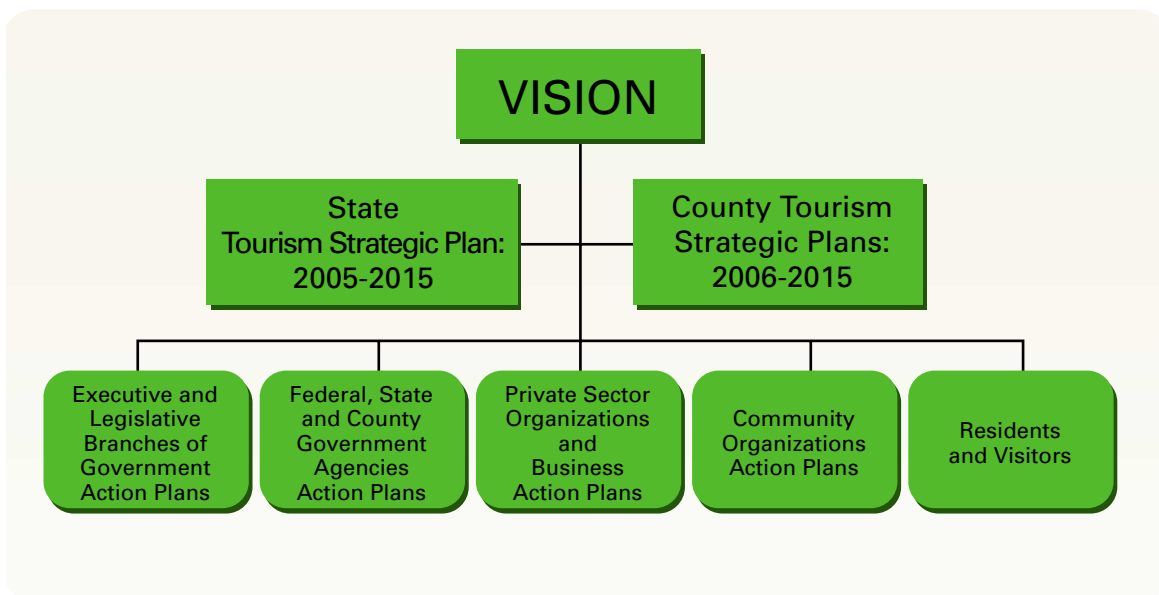
⁵ State of Hawai'i Department of Labor and Industrial Relations 2006

- Managing State and County Issues

As Hawai'i tourism is much more complicated today than when it was in its infancy, so too are the myriad of state and county issues that need to be managed. Chart 1 illustrates how state and county plans support each other, as well as the many stakeholders that need to play a role in achieving multiple objectives and state and county tourism visions.

Cooperation, collaboration, and participation by all stakeholders will be required to attain success. When this is done right, a healthy land, healthy people, and a healthy visitor industry will flourish.

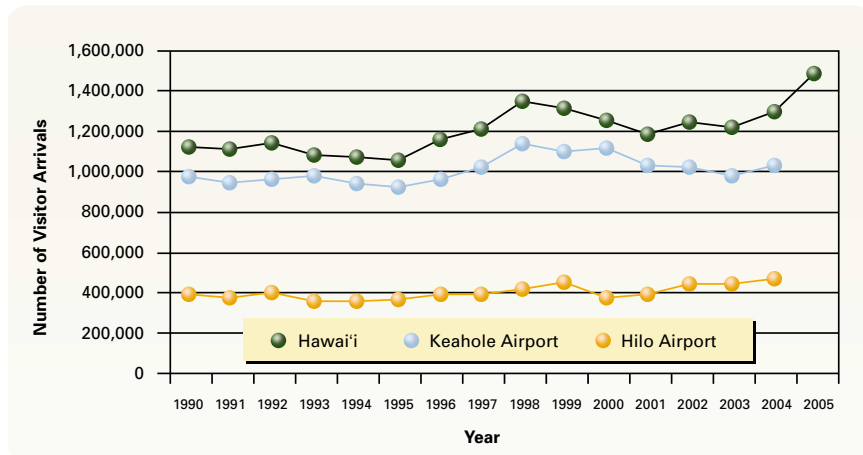
Chart 1: State and County Tourism Strategic Plans



B. Tourism on Hawai'i Island

1. Visitor Statistics

The number of visitors to Hawai'i Island has experienced spurts of growth that have been sustained since the early 1990s. The late 1990s saw growth on both the east and west sides of the island that were impacted with some decline in the period following September 11th, 2001 moving up in recent years. The strong increase in 2005 is primarily a result of increased air arrivals, as well as an increase in the number of day visitors arriving by cruise ships.

Chart 2: Historical Visitor Arrivals on Hawai'i Island⁶

In 2005, Hawai'i Island welcomed 1,487,747 visitors to the island who spent over \$1.5 billion. Visitors spent an average of \$154 per day, the lowest of all the counties in the state. Of visitor arrivals, 77% are domestic visitors, compared with 23% international visitors in 2005.⁷

As shown in Chart 2, 69% of air arrivals in 2004 flew into the Keahole International Airport in Kona. Contributing factors include the relative number of flights arriving and departing from the respective airports, and the larger number of budget and luxury visitor accommodations located on the west side.

The visitor industry has contributed significantly to the Hawai'i Island economy in revenues, as well as employment. In 2005, the visitor industry contributed 24% toward the island's Gross County Product (GCP).⁸ Likewise, 26,600, or approximately 40%, of all wage and salary jobs on island were identified in visitor related categories of Accommodations, Food Service, Arts and Entertainment, and Retail Trade.⁹

The visitor industry on Hawai'i Island is expected to have another strong year through April 2006. Hawai'i Island had 512,178 visitor arrivals, an increase of 6.6%, with visitor expenditures also up by 4% compared with April 2005.¹⁰

⁶ DBEDT Historical Visitor Statistics 2005, December

⁷ DBEDT Historical Visitor Statistics 2005, December

⁸ DBEDT Economic Data and Reports 2005

⁹ State of Hawai'i Department of Labor and Industrial Relations

¹⁰ DBEDT Monthly Visitor Statistics April 2005 & 2006

2. Visitor Accommodations

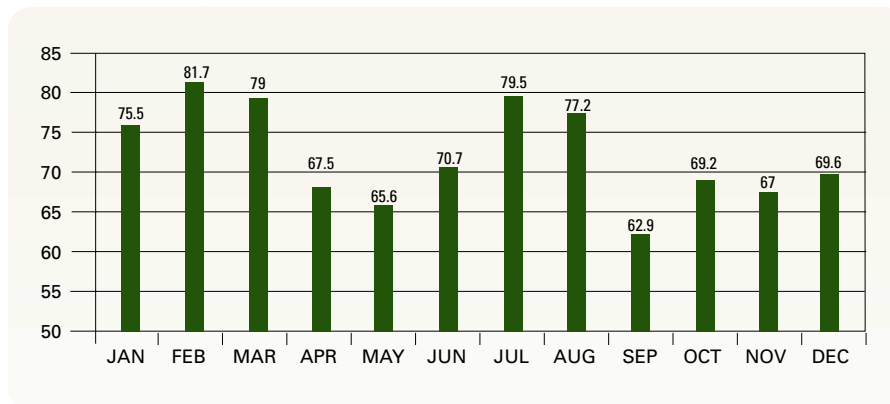
In 2005, Hawai'i Island had approximately 11,351 visitor units, an increase of 13% over the previous year.¹¹ This represents roughly 15% of the total number of units in the state. The breakout by types of units is:

- Hotel (6,977 units) 61.5%
- Timeshare (1,592 units) 14.0%
- Condo/Hotel (1,492 units) 12.9%
- Individual Vacation Units (756 units) 6.7%
- Bed & Breakfast (353 units) 3.1%

Hotel statistics in 2005 were:

- The average daily room rate (ADR) was \$170.
- Hotel occupancy averaged 72% with peak periods in February, March, July and August.

Chart 3: Hotel Occupancy in 2005 on Hawai'i Island¹²



As shown in Chart 3, 2005 was a favorable year for hotel occupancy, and 2006 is proving to be stronger. Occupancy levels during 2005 suggest that there is capacity in existing hotels to accommodate additional visitors to the island during “shoulder” or slower months of April through June, and September through December.

Hotel occupancy during the first four months of 2006 averaged 76.4%, a slight increase over the same period in 2005. The average room rate was \$189, an increase of 10% over the 2004 period.¹³ This higher room rate may raise visitor expectations of the level of service they can expect during their stay on Hawai'i Island.

¹¹ DBEDT Visitor Plant Inventory 2005, December

¹² Smith Travel, Hospitality Advisors 2005

¹³ Smith Travel Research, Hospitality Advisors, LLC

As shown in Chart 4, the majority of visitor units are located on the west side of the island, in the Kona and Kohala areas.

- Kona: 45%
- Kohala/Waimea: 41%
- Hilo: 12%

Chart 4: Visitor Accommodations by Area¹⁴



¹⁴ DBEDT Visitor Plant Inventory 2005

Hawai'i Island has a mix of visitor units; however, the majority are deluxe and standard type units, mostly located within newer resorts along the Kohala Coast.¹⁵

- Luxury (over \$500 per night) 11.8%
- Deluxe (\$251-\$500 per night) 35.3%
- Standard (\$101-\$250 per night) 34.3%
- Budget (\$100 or less per night) 18.5%

The remainder of the island has primarily budget and standard type accommodations. Many of these accommodations were built over twenty years ago, and few have undergone or are scheduled to undergo major renovations. For example, the four largest hotels in Hilo were built in the 1960s and 1970s:

- Hilo Seaside (opened in 1960, 140 units)
- Uncle Billy's Hilo Bay Hotel (opened in 1964, 143 units)
- Hawai'i Naniloa Resort (opened in 1969, 325 units)
- Hilo Hawaiian Hotel (opened in 1975, 285 units)

A challenge facing the renovation of Hilo hotels is that the land is owned and leased by the State Department of Land and Natural Resources. This land ownership issue creates additional hurdles for hotel owners to consider when planning for future renovations. However, the new owner of the Hawai'i Naniloa Resort has announced intentions to significantly renovate that hotel, but no timetable or details have been released.

Of the four hotels in Hilo, 99% of the rooms are in the budget and standard categories. Beyond these hotels, Bed & Breakfasts (B&Bs) and Individual Vacation Units (IVUs) provide alternate and newer types of accommodations for the east side. With this current mix, the east side of Hawai'i Island is limited in the type of overnight visitors that it can accommodate. The lack of deluxe and luxury accommodations on the east side creates a challenge in appealing to active and higher-end spending.

3. Critical Issues

Similar to the state, there are trends and changes that are occurring globally and locally impacting the visitor industry on Hawai'i Island. The sheer size of Hawai'i Island creates unique opportunities and challenges for visitor industry stakeholders on the island.

Opportunities include:

- a wide variety of natural experiences for visitors and residents to enjoy, from rainforests to lava fields, to frequent rains in east Hawai'i, to mostly sunny west Hawai'i, active volcanoes to dramatic waterfalls, cool Waimea climate, and sunny Ka'ū
- the ability for communities to enhance their differences as they build on their own unique sense of place and visitor product offerings
- rarely touched unique natural environments to study and explore

¹⁵ DBEDT Visitor Plant Inventory 2005, December

Challenges include the diverse geography and size:

- upscale visitors staying in select areas, concentrating spending within these communities and resorts
- a physical separation of the workforce from employment opportunities; island population is concentrated on the Hilo side, two hours away from numerous job openings in Waikōloa and Kailua-Kona
- workforce training; the main center of community college hospitality training is in Hilo while hospitality jobs are concentrated in Waikōloa and Kailua-Kona
- resident support of the industry varying by location

The key issues identified during the planning process are included below, with many of the issues highlighting geographical differences. These issues are not in priority order:

Resident Concerns

Overall resident sentiment toward tourism has been declining on Hawai'i Island particularly on the west side of the island. Between 2002 and 2005, the percentage of residents who strongly agreed *"overall, tourism has brought more benefits than problems to this island"* decreased 16 percentage points to 33% in west Hawai'i and decreased by 4 percentage points in east Hawai'i to 48%.¹⁶ Likewise, the percent of residents who reported strongly believing that *"this island is being run for tourists at the expense of local people"* increased 21 percentage points to 42% in west Hawai'i, and up 11 percentage points in east Hawai'i to 29%.

As the industry has grown, residents expressed concerns that their communities are losing their sense of place. A recommendation that emerged was for communities to focus on their unique qualities and provide new experiences based on the history and cultural background. These experiences will not only increase community pride, but also attract visitors looking for unique activities. For instance, educating visitors about cultural sites with geological significance, expanding local shops and restaurants, as well as promoting current sites, such as neighborhood museums. Not only will this enhance the visitor's experience and increase spending, but also result in community growth and enrichment. However, assistance may be required to accomplish this idea, because certain communities may not have sufficient funds for development and promotions.

Workforce Challenges

The strong economy of Hawai'i Island has resulted in the number of jobs increasing faster than the available number of skilled workers. The state's low unemployment has reduced the available labor pool significantly and created vacancies that are difficult to fill. The increase in visitor activity has resulted in an even tighter available workforce. On average in 2005, there were 81,429 people in the civilian workforce on Hawai'i Island with an unemployment rate of 3.27%. In the first four months of 2006, the average number employed increased to 82,700 with an unemployment rate of 2.85%.¹⁷ With this low unemployment rate, hotels and other visitor industry businesses have found it increasingly difficult to attract the numbers and quality of staff required. Moreover, employers are competing with other high demand industries, such as construction and health care, for available labor.

¹⁶ 2002 & 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Overall workforce availability on Hawai'i Island has been impacted by a number of factors, including demographic changes. Like the rest of the state, the population on Hawai'i Island is aging, with the baby boomers moving beyond the prime workforce years and with fewer residents in the younger age groups.

Visitor industry related businesses offered approximately 26,600 jobs in 2005. The visitor industry has even greater difficulty attracting workers due to geographic challenges and perceptions of the industry. **Currently, 58% of Hawai'i Island residents live on the east side of the island, while most of the visitor industry jobs are on the west side.** Waikōloa and Kona housing costs are high, and tourism wage levels have not kept pace with the increase in housing and transportation costs. Residents are unable to find affordable housing near their place of work, resulting in commute times to work for some residents averaging one to two hours of driving.¹⁸ Moreover, it is not feasible for workers in large numbers to move to Hawai'i Island with the average price of a single-family dwelling selling at \$392,500, an increase of 11% from January 2005 to 2006.

The visitor industry is also perceived as paying lower wages with fewer opportunities, whereas tourism wage levels have not kept pace with the rise in housing and transportation costs. Reported wages for visitor industry related jobs are 25% below reported wages for all jobs in Hawai'i.¹⁹ There is also a perception among residents that visitor industry jobs do not have the opportunity for future growth that they are looking for: 37% of residents surveyed responded that they strongly agree that *"tourism jobs don't have much opportunity."*²⁰

Finding employees on Hawai'i Island is difficult, and finding employees to work in the visitor industry is even more challenging due to a perceived lack of opportunity and lower wages, plus many of the jobs that are available are not in close proximity to where residents can and want to live. If quantity and quality of available employees continue to decline, service levels and quality will be adversely affected, and could lead to a decline in tourism.

Hawaiian Culture and Natural Resources

A successful, sustainable tourism industry on Hawai'i Island honors the Hawaiian culture, history, people and protects the islands' natural environment. The native Hawaiian culture is what continues to make Hawai'i unique and different from other destinations around the world. In community meetings, there were concerns expressed that the Hawaiian language is being lost because it is being mispronounced and misused in everyday language. Likewise, Hawaiian cultural traditions may not be sustained due to lack of knowledgeable younger cultural practitioners and advisors who have not yet been trained by this generation of *kūpuna* (elders).

¹⁷ State of Hawai'i Department of Labor and Industrial Relations

¹⁸ Dayton, Kevin. "Communities add to cost of living on Big Island." *Honolulu Advertiser*: 30 May 2006.

¹⁹ State of Hawai'i Department of Labor and Industrial Relations

²⁰ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

As Hawaiian culture is steeped in the natural resources of the island, both must be preserved and supported to retain this uniqueness and maintain the health of the islands. The increase in day visitors off cruise ships, overnight visitors, and the increase in overall resident counts impact the health of the environment. These increases result in greater traffic to popular beaches and visitor attractions such as the Hawai'i Volcanoes National Park. Current infrastructure at these locations, such as restroom facilities, is inadequate for large numbers of visitors arriving over a short period of time. Likewise, signage, trails, parking, and other infrastructure were designed to accommodate significantly fewer visitors than are currently on island.

Given these strains, Hawai'i Island residents report feeling the industry has adversely impacted both Hawaiian culture and its natural resources. The 2005 Resident Sentiment Survey shows that west and east Hawai'i residents responded that tourism has worsened *"the preservation of native Hawaiian culture"* by 40% and 27% respectively.²¹ Even more remarkably, as tourism relates to the *"preservation of nature and open spaces,"* west and east Hawai'i residents believe the effect has worsened by 49% and 44%. In contrast, only 22% and 21% on each side of the island believe the effect has been better.

Visitor Satisfaction and Activities

Visitors report high levels of satisfaction with Hawai'i Island. Of the visitors who reported, 59% said their trip was outstanding, while 72% said it was one of the best trips they had ever taken. Visitors who participate in a greater number of activities indicated higher satisfaction and spent more than other visitors.²²

Cruise Ships

In 2005, Hawai'i Island had over 300,000 cruise ship visitors spending two days on-island, one day in Hilo and one in Kona, averaging approximately 5,800 visitors per week, per side of the island. This was a total increase of over 75,000 annual cruise ship visitors compared with 2004.²³ Cruise ship visitors spend only a day on each side of the island; however, approximately 2,000 passengers arrive and depart at one time, resulting in significant surges on transportation resources, traffic, visitor attractions, parks and recreational facilities. Further studies are needed to analyze cruise ship spending, its impact to economic benefit, and determine mitigating steps to manage the flow and influx of passengers.

²¹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

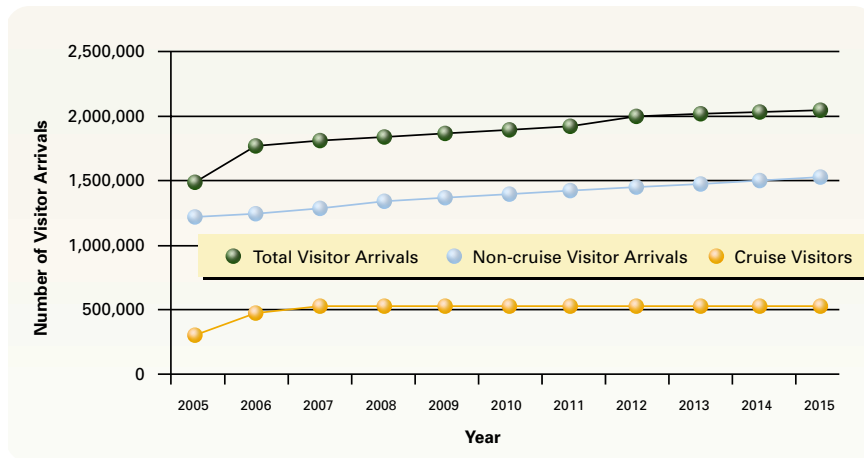
²² Big Island Visitors Bureau Research 2005

²³ DBEDT Monthly Visitor Statistics 2005, December

4. Forecast for Hawai'i Island

Over the next ten years, Hawai'i could experience significant changes in its visitor industry. One change is an increase in the number of cruise ships, resulting in the increase in day visitors. It is important to note that cruise ship schedules are determined at a state level, not at county levels.

Chart 5: Forecast of Visitor Arrivals²⁴



Due to already planned cruise ship arrivals, cruise visitors to Hawai'i Island will increase by 175,000 per year beginning in 2006, with an additional 50,000 expected in 2007. DBEDT projects an additional increase in non-cruise visitors at 1.5% per year beginning in 2009.²⁵

Potential factors that will affect the visitor industry include the number and type of available visitor units, size and quality of the workforce, and resident support of the industry.

- Traditional visitor accommodations capacity is a major constraint to significantly greater growth. While increasing hotel occupancy year-round and especially during shoulder periods is still an opportunity, it is limited. Hotels have enjoyed higher occupancy rates in recent years. Based on the 2005 DBEDT Visitor Plant Inventory, there are no major resort property development projects with permits and zoning on the island of Hawai'i at this time. It appears that it is unlikely that any accommodations of significant size will be developed over the next ten years. Meanwhile, several communities are exploring hosting visitors in smaller, community-based accommodations such as B&Bs, IVUs and educational facilities, such as programs offered by The Kohala Center. These projects are more community-driven and may be the primary source for future accommodations growth in the next ten years.

²⁴ SMS Long Term Forecast

²⁵ SMS Long Term Forecast

- Through April 2006 the unemployment rate on Hawai'i Island averaged 2.85%, a drop from 3.18% during the same period in 2005, even as the total civilian workforce increased.²⁶ If this trend continues there will be minimal numbers of employees available to staff visitor accommodations, especially at the level of service required by the deluxe and luxury properties currently charging higher prices. The high cost of housing continues to discourage new workers from moving to Hawai'i Island and in fact, encourages migration of younger people from Hawai'i Island, resulting in even fewer available workers.
- Based on feedback in community meetings, residents recognize the importance of the visitor industry and support future growth, but at the same time, are frustrated by the impact of the increase in visitor numbers. The greater number of visitors does not equate to increased visitor spending around the island. Natural resources and Hawaiian culture are perceived to be at greater risk due to the growing number of people on-island.

This plan begins to address the challenge of balancing the economic needs of the county, visitor industry and visitors, as well as the needs of the residents, natural environment, and Hawaiian culture. Successfully implemented, this plan can result in greater resident satisfaction, preservation of natural resources, perpetuation of Hawaiian culture, and increased visitor satisfaction. This will result in economic benefits for the visitor industry and the County of Hawai'i, and ultimately sustain the "Aloha" spirit, with the warmth and hospitality of the people of Hawai'i.

²⁶ State of Hawai'i Department of Labor and Industrial Relations 2005 & 2006

III. Hawai'i Island Tourism Strategic Plan

A. Plan Assumptions

The following are underlying factors in the planning process that were agreed to in discussions of the Hawai'i Island Advisory Committee and are shared for the purpose of providing greater insight into the considerations for this plan:

- The quality of life for Hawai'i Island residents is important for all who do business on the island, including the visitor industry. As a major industry impacting resident quality of life, the visitor industry endeavors to make positive impacts on quality of life, benefiting both residents and visitors alike.
- The Hawaiian culture is what makes Hawai'i, the state, and the island unique for both residents and visitors. This indigenous culture must be retained and perpetuated for future generations. The natural environment of Hawai'i Island is inextricably linked to Hawaiian culture, thereby linking the preservation and protection of the environment to perpetuation of the Hawaiian culture.
- Many diverse cultures make up the resident population of Hawai'i Island and contribute in significant ways to its diversity.
- The type and expectations of visitors traveling to Hawai'i Island are changing. Changes must be anticipated and planned to ensure a vibrant visitor industry. There are opportunities today to highlight what is unique about Hawai'i island and match it with changing visitor expectations.
- The visitor industry has historically been cyclical. We need to anticipate and plan for both up and down cycles in the industry.
- This plan embraces the concepts of sustainable tourism.²⁷
- Technology represents new opportunities to promote Hawai'i Island and deliver information to future visitors.
- Agreement can be reached on a name for Hawai'i Island that is both respectful of place and addresses marketing challenges faced by the visitor industry.

²⁷ Appendix F

B. Plan Structure

The following discusses the different sections throughout the plan.

Vision

The values underlying the Hawai'i Island TSP resonate first in the vision, and then throughout the strategic plan, filtering through the goals, objectives, and strategies. The vision for Hawai'i Island tourism describes the ideal way tourism should interact with its stakeholders. This vision is what the Hawai'i Island TSP is striving to achieve. The vision included in the Hawai'i Island TSP is consistent with the vision in the State TSP with the addition of a quality of life statement for residents.

Goals

Goals are incremental steps to the vision being achieved. For the Hawai'i Island TSP a 2015 goal was developed. The 2015 goal reflects how tourism and its stakeholders will relate to each other for the vision to be achieved.

Objectives

There are seven objectives in this plan. The objectives are designed to move Hawai'i Island closer to achieving the plan goal and realizing the plan vision. Six of the objectives relate directly to the plan vision and goal. The seventh objective was developed to ensure the plan has a process to move forward toward successful implementation.

Each objective is considered of equal importance and each must be supported and valued for this balanced plan to be successful.

Strategies

Accompanying each of the seven objectives are one or more strategies. These strategies were identified because they have the potential for implementation over a three-year time horizon; they will move us closer to achieving the objective, and they either build on relevant work already being done or outline new work that needs to be undertaken.

As would be expected in a complex and integrated plan, many strategies address more than one objective. When a strategy addresses more than one objective, the strategy is associated with the objective with which it is most closely aligned. Successful implementation of these strategies will contribute to progress across more than one objective.

During the planning process, a number of strategies were identified that were not deemed to be as urgent and/or able to be accomplished over the next three years. These strategies are included in Appendix D for future consideration.

To demonstrate alignment between this plan and the State TSP each strategy stated below is identified with one or more of the nine strategic initiatives in the State Plan in Appendix E.

Action Plans

Strategies are supported with draft action plans that list recommended action steps. Action plans are separate working documents that are developed and expected to be adjusted regularly by individuals and or planning oversight committees as necessary. Action plans identify recommended champions and supporting organizations needed to implement specific actions to achieve the strategy. More information on oversight functions is described later in this document under Objective 7. Action plans can be obtained by contacting the County of Hawai'i, Department of Research and Development.

Measurements

A performance scorecard, with high level current measures and directional targets for 2009, are associated with each of the seven objectives. The scorecard includes measures or indicators that will help gauge whether progress is being made toward achieving each objective. If progress is not made on a measure, action plans and strategies should be reviewed to evaluate if adjustments should be made in the plan.

The only measures included in scorecards at this time are those that have current data. It is recognized that these measures may not be as descriptive or encompassing as desired, therefore, one of the strategies for Objective 7 is to develop new measures if appropriate. Additionally, specific actions will lead to specific outcomes that can and should be used to measure success as appropriate. Over time, these measurements and any new measurements should be included in the scorecards.

C. Hawai'i Island Tourism Vision

The vision for tourism is a reflection of the hopes, values, and aspirations of the many stakeholders.

Tourism on Hawai'i Island will:

- Honor the people and heritage of Hawai'i Island;
- Support and enhance the quality of life for residents;
- Value and perpetuate the natural and cultural resources of Hawai'i Island;
- Engender mutual respect and partnership among all stakeholders, including future generations;
- Support a vital and sustainable economy; and
- Provide a unique, memorable and enriching visitor experience.

D. Hawai'i Island Tourism Goal

The goal of this plan assumes a direct relationship between the health of the land, its people, and a sustainable and vibrant visitor industry.

Ola ka 'Āina, Ola ke Kānaka! (Healthy Land, Healthy People!)

The goal to be achieved by 2015 is:

To strategically manage tourism on Hawai'i Island, in a sustainable manner, that promotes a high quality of life for residents, preservation of our natural and cultural resources, quality experiences for visitors and economic growth for the county.

E. Hawai'i Island Tourism Objectives, Strategies, and Measures

Each of the following seven objectives is considered of equal importance, and each must be supported and valued for this balanced plan to be successful.

Objective 1: To increase the economic contribution of the visitor industry to Hawai'i Island and its communities.

Rationale: Tourism represents approximately 24% of the island's Gross County Product,²⁸ employs a significant workforce, and of all Hawaiian Islands, has the most opportunity to increase the number of accommodation units. To ensure the island's viability and continued growth, this plan focuses on increasing the economic contribution from the visitor industry.

Communicating the attributes of Hawai'i's "Island of Adventure," and targeting visitor markets that will actively experience what the island has to offer, have been and will continue to be critical to the strength of the industry on Hawai'i Island.

Communities are encouraged to create activities and develop visitor products that are unique to their communities, and that reflect their sense of place. These new experiences will contribute to diversifying visitor spending around the island and offer visitors new and different experiences.

Given that a significant number of new visitor accommodations are unlikely to be built, renovations to existing older properties are recommended to increase the average room rate for these accommodations. Moreover, attention must be given to **harbors** and airports to elevate the level of service, accommodate visitors, and provide culturally appropriate Hawaiian ambiance.

Visitors come to Hawai'i to experience the aloha spirit and expect a quality level of service to meet their expectations. This objective can be obtained by training workers with the skills required within the visitor industry.

²⁸ DBEDT Economic Data and Reports, 2005

Overall, these actions will result in an increase in dollars to Hawai'i Island's Gross County Product, while tourism, as an industry, will remain constant in its relative contribution to the County of Hawai'i's economy.

Strategies to Achieve Objective 1 for 2006 to 2009:

- a. Develop and implement an annual tourism marketing plan aimed at desired target consumer and business markets.

Target markets include:

1. Consumer markets – Adventure/outdoor activity seekers, arts and culture enthusiasts, golfers, science/nature buffs (astronomy, volcano)
2. Business markets – North American and Japan incentive travelers
3. Existing Hawai'i Island markets

Action Plan Summary: Develop and implement an annual tourism marketing plan based on research identifying more active visitors attracted to the features of Hawai'i Island.

Action Plan Champion: Hawai'i's Big Island Visitors Bureau

Action Plan Output: An annual marketing plan with stated goals and objectives.

- b. Support community-based development as a means of generating economic activity island wide, while providing visitors with a greater number and variety of experiences, and residents with a vehicle to enhance and enjoy their communities.

Action Plan Summary: Educate communities on the opportunities to create community-driven activities that reflect their own sense of place. Identify potential communities for pilot projects. Support pilot projects with County Product Enrichment Program (CPEP) funds as well as other sources of county funds. Share the success of the pilot projects to encourage more communities to engage in this process.

Action Plan Champion: County Office of Economic Development

Action Plan Output: One or more pilot communities have demonstration projects in place to support community-based business development that reflects local culture and history, and make services and products available to the visitor and resident markets.

- c. Encourage renovation of visitor-oriented properties, particularly in Kona, Hilo, and the Kohala Coast to improve the quality of visitor accommodations.

Action Plan Summary: Support favorable legislation regarding renovation and improvement of properties.

Action Plan Champion: County Research & Development

Action Plan Output: Legislation adopted that supports the renovation of visitor properties.

- d. Support programs that make airports more welcoming to arriving and departing passengers.

Action Plan Summary: Establish an airport “ambassadors” program and make airport signage more informative and welcoming.

Action Plan Champion: County Research & Development

Action Plan Output: Welcoming program in place at airports; more welcoming signage at airports.

- e. Support harbor and pier improvements to ensure Hawai'i Island facilities can meet the anticipated increasing needs.

Action Plan Summary: Support plans for funding harbors and pier improvements.

Action Plan Champion: State Department of Transportation and Department of Land and Natural Resources

Action Plan Output: Harbors and pier improvement plans are implemented.

- f. Develop and support programs that build a sufficient and qualified visitor industry workforce.

Action Plan Summary: Expand visitor industry-related training, education and outreach programs within the DOE, Community College, University and workplace.

Action Plan Champion: State Department of Education, University of Hawai'i – Travel Industry Management and Hawai'i Tourism Authority

Action Plan Output: Hawai'i Island public schools institute an Academy of Tourism and Hospitality program; more Hawai'i Island students attending UH-TIM classes; new programs in place to assist visitor industry employers with workforce recruitment, training, and retention.

Objective 1 Scorecard: To increase the economic contribution of the visitor industry to Hawai'i Island and its communities.

	Measures	Benchmark	Data Year	Directional Change for 2009
1.1	Per-Person Per-Day Spending: ²⁹	\$154	2005	Increase*
	Total Arrivals: ³⁰	1,487,747	2005	Increase
	Total Expenditures (in millions): ³¹	\$1,506	2005	Increase*
1.2	Average Hotel Occupancy: ³²	72%	2005	Increase
	April - May Occupancy:	66%	2005	
	September - December Occupancy:	67%	2005	
1.3	Number of jobs in visitor industry-related fields: ³³	26,6000	2005	Increase
1.4	Residents surveyed: give tax incentives for renovating existing hotels: ³⁴	54% Agree	2005	Increase

*Inflation Adjusted

²⁹ DBEDT Monthly Visitor Statistics 2005, December

³⁰ DBEDT Monthly Visitor Statistics 2005, December

³¹ DBEDT Monthly Visitor Statistics 2005, December

³² Smith Travel Research/Hospitality Advisors, LLC. 2005

³³ Department of Labor and Industrial Relations (Accommodations, Food Service, Arts and Entertainment, and Retail Trade

³⁴ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Objective 2: To make positive contributions to the quality of life for residents, such as:

- Putting “community first”
- Helping to ensure communities retain their sense of place, including recognizing their multi-cultural diversity
- Providing increased business opportunities
- Providing workforce housing opportunities

Rationale: There is a direct and interdependent relationship between resident quality of life and the visitor experience. When residents have a good quality of life, and are happy with the place they call home, this will reflect a positive foundation for visitors who come to experience it.

“Buying local” and purchasing goods and services from local businesses is one way the visitor industry can support local communities. In doing so, communities retain their traditional character while developing economic opportunities.

When the visitor industry is successful, this, in turn, generates increased employment and other economic opportunities for residents. The better we maintain the balance between the visitor industry and resident needs, the stronger the community. Only when this balance is achieved will there be healthy communities and a thriving, sustainable industry. An approach in achieving this objective is to focus on workforce training, and to support programs that recognize authentic Hawaiian culture.

Traffic solutions on Hawai'i Island on any given day are one way the visitor industry can help improve the quality of life for residents. Examples include increased transportation alternatives for both visitors and industry employees, in addition to coordination between ground transportation providers and tour operators.

Additionally, the visitor industry can take an active role in providing workforce housing opportunities and advocating for programs that support affordable housing solutions.

Strategies to Achieve Objective 2 for 2006 to 2009:

- a. Support local businesses and producers to better promote their local products, services and activities to visitors and the industry. Provide incentives and better enable visitor industry companies to buy local.

Action Plan Summary: Identify local businesses and producers that would like to develop or expand their products to the visitor industry. Ensure they have access to necessary technical assistance and support. Identify and reduce barriers that prevent visitor industry companies from buying Hawai'i Island local products.

Action Plan Champion: County Research & Development

Action Plan Output: More Hawai'i Island businesses selling goods to visitors and the industry.

- b. Support efforts to develop educational programs in basic workforce readiness (such as communications skills, basic computations, and computer literacy).

Action Plan Summary: Based on the findings from the UH-TIM workforce report, organize an Education Advisory Committee to implement recommendations and begin meeting training gaps.

Action Plan Champion: Hawai'i Community College

Action Plan Output: New training programs developed for workplace readiness including culture, history, and basic skills.

- c. Develop a Hawai'i Island program that recognizes and rewards:

- i. Visitor industry employees for acquiring greater knowledge of Hawaiian culture and history.
- ii. Local business producers who have successfully increased sales to the visitor industry.
- iii. Visitor industry companies that reflect the "Hawai'i Island sense of place."

Action Plan Summary: Building off of the HTA "Keep it Hawai'i Awards," create an event that recognizes Hawai'i Island businesses and employees for their efforts to reflect Hawai'i's sense of place.

Action Plan Champion: County Research & Development

Action Plan Output: A recognition program in place to encourage activities among visitor industry businesses and employees to reflect Hawai'i Island's sense of place.

- d. Encourage coordination, collaboration and improvement in public transportation services for both residents and visitors.

Action Plan Summary: Support efforts underway to improve access to and use of public transportation services.

Action Plan Champion: County Department of Transportation – Mass Transit

Action Plan Output: Residents and visitors have more public transportation options.

- e. Support efforts underway to identify solutions to the lack of affordable workforce housing.

Action Plan Summary: Support existing efforts of the public and private sectors to address problems of the lack of workforce housing.

Action Plan Champion: Office of Housing and Community Development

Action Plan Output: Oversight committee supports efforts to address lack of workforce housing.

Objective 2 Scorecard: To make positive contributions to the quality of life for residents.

	Measures	Benchmark	Data Year	Directional Change for 2009
2.1	Residents who agree: ³⁵ - Most tourism jobs don't have much opportunity: - Tourism has brought more benefits: - Need more tourism jobs: - Tourism has been mostly good for self and family:	49% 67% 38% 42%	2005	Reverse Negative Trend
2.2	Residents surveyed: how good a job the county visitor industry is doing helping other local businesses profit from tourist dollars: ³⁶	46% Good	2005	Reverse Negative Trend
2.3	Residents surveyed: how good a job the county visitor industry is doing providing local residents with training: ³⁷	30% Good	2005	Reverse Negative Trend
2.4	Number of farms with agri-tourism activity: ³⁸	89	2003	Increase

³⁵ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

³⁶ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

³⁷ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

³⁸ Hawai'i Department of Agriculture NASS, Hawai'i Agricultural Statistics 2003

Objective 3: To increase communication, interaction, and understanding between stakeholder groups, especially between residents and the visitor industry.

Rationale: One of the keys to a successful visitor industry on Hawai'i Island is ensuring there is active communication and understanding between key stakeholder groups. The primary strategy to achieve this is to ensure that all stakeholders on the island understand the Hawai'i Island Tourism Strategic Plan, particularly the role of the community-based pilot projects described in strategy 1.b. The design and success of these projects will demonstrate the positive results of communities and the visitor industry working together for mutual benefit.

An essential component of this objective is developing a communications plan to ensure word gets out about the overall strategic plan, and the opportunities it offers toward communities.

As communities engage in business development that supports residents and visitors, the natural outcome will be a greater level of understanding and appreciation among all stakeholders.

Strategies to Achieve Objective 3 for 2006 to 2009:

- a. Enhance awareness and understanding of the Hawai'i Island Tourism Strategic Plan, particularly highlighting the opportunities and future success of the community-based projects. (noted in strategy 1.b)

Action Plan Summary: Initiate outreach programs that include speakers to promote the successes of small businesses or communities who have benefited from the integration of tourism in their businesses.

Action Plan Champion: County Research & Development

Action Plan Output: Awareness of the one or more pilot communities that have demonstration projects in place. (refer to strategy 1.b)

Objective 3 Scorecard: To increase communication, interaction, and understanding between stakeholder groups, especially between residents and the visitor industry.

	Measures	Benchmark	Data Year	Directional Change for 2009
3.1	Residents surveyed: how good a job the county visitor industry is doing making local residents feel welcome in hotels and other visitor facilities: ³⁹	54% Good	2005	Reverse Negative Trend
3.2	Residents surveyed: how good a job the government has done in promoting festivals, arts, and cultural activities to bring visitors and residents together: ⁴⁰	45% Good	2005	Increase
3.3	Residents surveyed: how tourism affects your county on the overall quality of life: ⁴¹	46% Better	2005	Reverse Negative Trend

Objective 4: To maintain and improve visitor satisfaction with their experience on Hawai'i Island.

Rationale: Visitor satisfaction involves many facets that include meeting visitor expectations, high levels of service, Hawaiian culture, and the aloha spirit. High levels of visitor satisfaction are essential for a thriving visitor industry. Key to ensuring that visitors are highly satisfied is ensuring a good match between their expectations and Hawai'i Island's attributes. Important elements in ensuring visitor satisfaction are safety, an understanding of the Hawaiian culture and its history, and appropriate access to Hawai'i's natural resources.

Satisfied visitors share their experiences with others, and serve as a marketing vehicle for Hawai'i Island. They are also more likely to return to the island and explore other areas of the island.

³⁹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴⁰ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴¹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Strategies to Achieve Objective 4 for 2006 to 2009:

- a. Advocate for and support the development of a means of educating visitors prior to or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources.

Action Plan Summary: Together with the state and other counties, develop and deliver education and information to visitors that enhance their visit to Hawai'i Island.

Action Plan Champion: Hawai'i's Big Island Visitors Bureau, Hawai'i Visitor and Convention Bureau and County Research & Development

Action Plan Output: New messages and vehicles for communicating messages to visitors about safety, culture, and natural resources.

- b. Encourage and support the implementation of an island-wide initiative to bring a *Hawaiian sense of place* to life on Hawai'i Island.

Action Plan Summary: Identify and then implement strategies promoting a Hawaiian sense of place.

Action Plan Champion: University of Hawai'i – Hilo and County Research & Development

Action Plan Output: Island-wide campaign based on the Hawai'i Island tourism strategic plan, and focusing on promoting Hawaiian sense of place.

- c. Together with the community development efforts described in 1.b. support the development of consistent, accurate signage to provide easy directions and identify communities, historical sites, and dangerous areas. Provide interpretive methods to educate and enhance cultural, natural, and historical sites.

Action Plan Summary: Identify and recommend opportunities for improving signage that meet both resident and visitor needs.

Action Plan Champion: County Research & Development

Action Plan Output: Improvements to signage occur in alignment with tourism strategic plan strategies.

- d. Support efforts to increase safety and security for visitors and residents at public places, such as beach parks, events, and cultural sites.

Action Plan Summary: Identify and address times and places where higher rates of crimes to visitors and residents occur. Implement strategies to increase safety.

Action Plan Champion: County Police, Department of Land & Natural Resources, National Park Service and County Research & Development

Action Plan Output: Strategies are implemented to address higher crime sites or activities that put residents and visitors at increased risk.

- e. Support the development of a process by which visitors can access information (multi-lingual) in case of an emergency, natural disaster, etc.

Action Plan Summary: Work together with state officials and other counties to develop necessary safety and emergency response information for visitors.

Action Plan Champion: Hawai'i's Big Island Visitors Bureau and County Research & Development

Action Plan Output: Safety and emergency response information will be accessible to visitors.

- f. Implement programs to help ensure the attractiveness of beaches and parks.

Action Plan Summary: Identify high priority beaches and parks. Develop and implement plans for ensuring ongoing improvements and maintenance.

Action Plan Champion: County Department of Parks and Recreation and Department of Land & Natural Resources

Action Plan Output: Parks and beaches with high usage by residents and visitors are well maintained and attractive.

Objective 4 Scorecard: To maintain and improve visitor satisfaction with their experience on Hawai'i Island.

	Measures	Benchmark	Data Year	Directional Change for 2009
4.1	Visitor Activity Participation – North American: ⁴² - Sightseeing - Recreation - Entertainment - Shopping - Culture - Transportation	Hilo Kona 87% 85% 38% 75% 26% 58% 48% 75% 43% 60% 46% 70%	2005	Moderate Increase
	Visitor Activity Participation – Japanese: - Sightseeing - Recreation - Entertainment - Shopping - Culture - Transportation	Hilo Kona 91% 91% 16% 51% 41% 62% 29% 64% 22% 31% 16% 41%	2005	Moderate Increase
4.2	Visitor Satisfaction – North American: ⁴³ - Excellent - Above Average - Below Average - Poor	52% 40% 8% 0.3%	2005	Significant Increase
	Visitor Satisfaction – Japanese: - Excellent - Above Average - Below Average - Poor	47% 44% 9% 0%	2005	Significant Increase

⁴² DBEDT Visitor Satisfaction and Activity Report 2005

⁴³ DBEDT Visitor Satisfaction and Activity Report 2005

Objective 5: To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of our host culture.

Rationale: It is the Hawaiian culture that distinguishes Hawai'i. In order to keep it the very special place that residents and visitors cherish, the culture must be recognized and perpetuated.

In order to perpetuate Hawaiian culture, this plan recognizes the need to share the culture and history accurately and respectfully. This requires guidance from cultural practitioners and respected Hawaiian leaders who can confirm protocols and ensure this cultural knowledge is perpetuated in the next generation. The visitor industry is in an ideal position to promote Hawaiian culture and traditions in an authentic and respectful way.

These strategies in this plan can help to ensure the Hawaiian culture remains the foundation of this unique place. These are comprised of culturally relevant programs that will enhance the authentic and accurate use of the Hawaiian language, interpretative signage, and educational materials that help convey the history of the culture.

Strategies to Achieve Objective 5 for 2006 to 2009:

- a. Encourage the development of programs to recognize and share Hawaiian culture and history to support an informed and knowledgeable community.
 - i. Continue "Keep It Hawai'i" program to recognize authentic Hawaiian culture
 - ii. Promote proper pronunciation, spelling, and use of Hawaiian words

Action Plan Summary: Training and integrated programs are developed to share Hawaiian culture and history with visitor industry workforce and related community stakeholders.

Action Plan Champion: Native Hawaiian Hospitality Association (NaHHa) and County Research & Development

Action Plan Output: Hawaiian culture and history are integrated into the language and actions of our visitor industry and related community stakeholders. The best examples and models are recognized each year by the County of Hawai'i, the community, and visitor industry.

- b. Advocate for appropriate interpretive signage and educational information in public places.

Action Plan Summary: Advocate for the importance of interpretive signage. Identify priority locations and develop signage or educational materials.

Action Plan Champion: County Department of Parks and Recreation and Department of Land & Natural Resources

Action Plan Output: Interpretive signage or educational materials are available for priority sites.

- c. Expand the number and quality of Hawaiian cultural festivals and events. Support events in the development stage to become self-supporting and then work with groups developing new festivals and events.

Action Plan Summary: Support existing and new cultural festivals that promote authentic Hawaiian culture.

Action Plan Champion: County Research & Development

Action Plan Output: Better marketing and increase in the number of festivals that promote authentic Hawaiian culture.

Objective 5 Scorecard: To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of our host culture.

	Measures	Benchmark	Data Year	Directional Change for 2009
5.1	Residents surveyed: how tourism affects your county regarding the preservation of native Hawaiian culture: ⁴⁴	48% Poorly	2005	Reverse Negative Trend
5.2	Residents surveyed: how good a job the county visitor industry is doing treating native Hawaiian culture in an accurate and respectful way: ⁴⁵	26% Poorly	2005	Reverse Negative Trend

⁴⁴ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and Knox and Associates, December 2005

⁴⁵ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and Knox and Associates, December 2005

Objective 6: To support the enhancement and maintenance of the natural resources of Hawai'i Island.

Rationale: Hawaiian culture and the natural resources of Hawai'i are inextricably linked. Therefore, preservation of natural resources is essential to ensuring the perpetuation of the Hawaiian culture. Both the Hawaiian culture and the natural resources are essential to the viability of the visitor industry.

To ensure that Hawai'i's natural resources are protected, this plan calls for identifying the priority of natural resources and understanding its value. This can be achieved by ensuring appropriate access and infrastructure, supporting protection and stewardship, and providing education with interpretation of those sites.

Strategies to Achieve Objective 6 for 2006 to 2009:

- a. Develop an inventory of the natural areas identifying those that are determined appropriate for access. Then develop plans for protection, education, and management.

Action Plan Summary: Promote access to the priority natural sites. Develop appropriate educational programs and resources. Support the control and eradication of invasive species in natural sites by supporting efforts of groups working on invasive species. Support efforts to create opportunities to engage residents and visitors in volunteer service programs to maintain and protect the priority natural resources.

Action Plan Champion: Department of Land and Natural Resources and County Department of Parks and Recreation

Action Plan Output: Natural areas are protected and managed. Residents and visitors have access to selected sites, including educational and interpretative information.

- b. Support programs to provide training and certification for people who interpret natural resources through appropriate signage and information materials. Where appropriate, ensure the conservation and natural resources messages are clearly linked to Hawaiian culture.

Action Plan Summary: Agree on accurate messages for various identified natural sites. Train interpretive guides and develop educational materials.

Action Plan Champion: University of Hawai'i – Hilo, Hawai'i Community College

Action Plan Output: Trained interpretive guides who have culturally and scientifically accurate information to educate residents and visitors who visit natural sites.

Objective 6 Scorecard: To support the enhancement and maintenance of the natural resources of Hawai'i Island.

	Measures	Benchmark	Data Year	Directional Change for 2009
6.1	Residents surveyed: how tourism affects your county regarding the preservation of nature and open space: ⁴⁶	46% Poorly	2005	Reverse Negative Trend
6.2	Residents surveyed: how good a job the county visitor industry is doing conserving natural resources: ⁴⁷	30% Good	2005	Reverse Negative Trend
6.3	Estimated acreage of land use: ⁴⁸ - Urban - Conservation - Agricultural - Rural	53,722 1,304,347 1,214,527 804	2005	Track
6.4	Residents surveyed: possible community problems in the number and quality of parks: ⁴⁹	64% Problem	2005	Reverse Negative Trend

Objective 7: To establish an oversight mechanism for ensuring plan implementation, including scorecard tracking, plan reviews and revisions as necessary.

Rationale: To ensure that this plan is implemented, a planning and oversight body will be established. The purpose of this group will be to guide the plan's implementation, monitor progress, make mid-course adjustments and ensure alignment of this plan with other county, regional, or state plans.

The scorecards associated with each objective will help the oversight body assess progress over time, and will be revised and expanded upon as needed. No one organization or group has responsibility for the entirety of this plan. Thus, it is necessary to have a diverse oversight body that ensures momentum is maintained, and diverse constituents contribute to the success of the plan.

⁴⁶ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴⁷ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴⁸ County of Hawai'i Data Book Section 6: Land Use 2004

⁴⁹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Strategies to Achieve Objective 7 for 2006 to 2009:

- a. County Department of Research and Development will oversee the implementation of this plan with the assistance of an oversight committee.

Action Plan Summary: Convene oversight committee and begin supporting implementation of plan.

Action Plan Champion: County Research & Development

Action Plan Output: Progress is made on implementing the Hawai'i Island Tourism Strategic Plan. Conduct annual reviews on progress made on the plan.

- b. Develop additional measures for tracking impact of plan.

Action Plan Summary: Over time, new measures are identified to strengthen the ability to track tourism strategic plan progress.

Action Plan Champion: County Research & Development

Action Plan Output: Scorecards are increasingly useful to the oversight committee and to other visitor industry stakeholders, in tracking the progress of this TSP.

Objective 7 Scorecard: To establish an oversight mechanism for ensuring plan implementation, including scorecard tracking, plan reviews and revisions as necessary.

	Measures
7.1	Action steps completed as indicated in the plan. (Percent of action steps completed as indicated in the plans.)
7.2	TSP tracked and updated every year. (Annual meeting of Advisory Committee conducted, updated scorecards presented and plans revised as appropriate.)
7.3	Percent of desired scorecard measures with regularly available data provided to track progress.
7.4	Number of directional measures that met targets.

IV. Appendices

A. Acknowledgments

Mahalo to all those involved in developing the Hawai'i Island Tourism Strategic Plan 2006 – 2015. Thank you to the community, stakeholders, and the visitor industry for all your valuable insights and dedication to ensuring the plan will be successfully implemented. If we neglected to include your name on this list, we humbly apologize.

County of Hawai'i

The Honorable Harry Kim, Mayor – County of Hawai'i
 Jane Testa, Director, County of Hawai'i – Department of Research and Development
 Diane Ley, Deputy Director, County of Hawai'i – Department of Research and Development

Hawai'i Tourism Strategic Planning Advisory Committee

George Applegate, Hawai'i Big Island Visitors Bureau
 Keola Awong, Hawai'i Volcanoes National Park
 Ian Birnie, Department of Transportation, Harbors Division, Port of Hilo
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 Diane Quitiquit, Parker Ranch
 Jim Reddekopp, Jr., Hawaiian Vanilla Company
 Skylark Rossetti, Kamehameha Schools Alumni
 Wendy Scott-Vance, Kala Committee
 Dieter Seeger, Hilton Waikōloa Village
 Robert Shallenberger, The Nature Conservancy
 Craig Shiroma, Hawaiian Airlines
 Steve Shropshire, Hilo - Downtown Improvement Association
 Jan Yokoyama, Department of Health, County Citizens Emergency Response Teams

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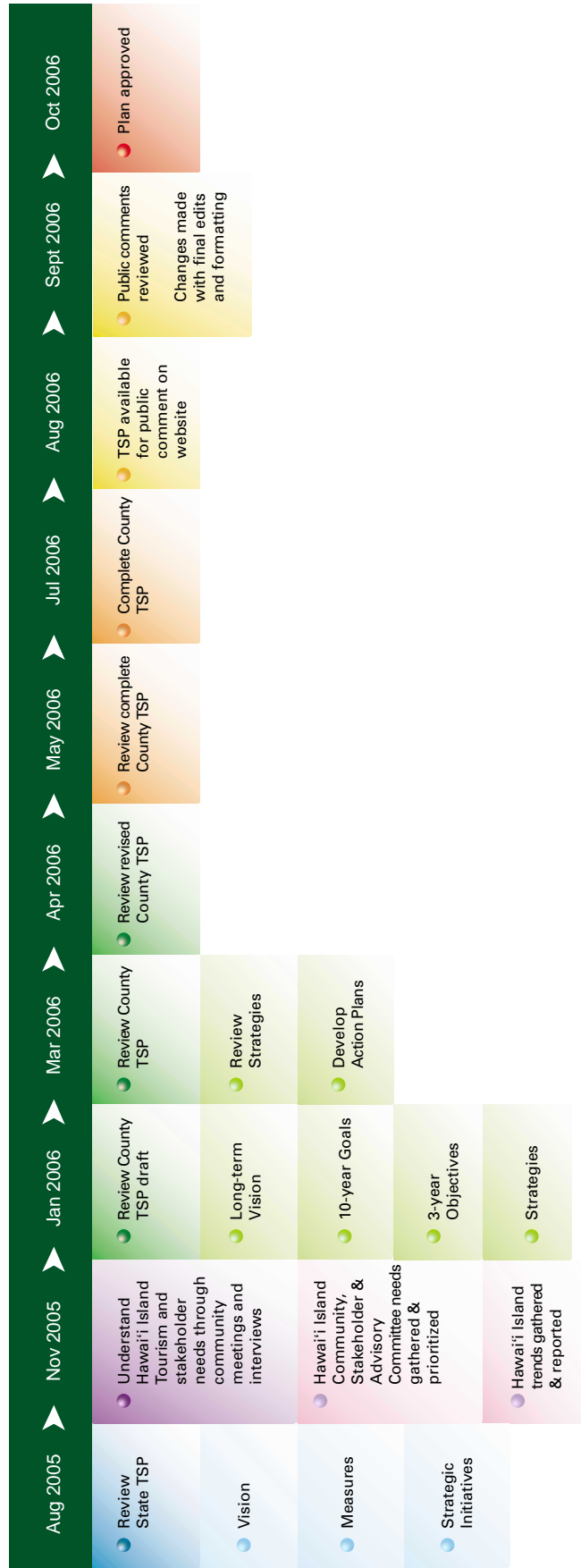
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B: Hawai'i Island Tourism Strategic Plan Timeline and Key Events



C: Hawai'i Island Community Input

Community, Stakeholder Interviews, Online and Written Comments

Throughout the planning process input was sought from all visitor industry stakeholder groups. For a balanced plan to be developed, the major needs of each of these groups must be addressed. The following is a summary of the comments submitted by stakeholder groups:

- Government (county, state and federal)
- Residents
- Visitor Industry
- Visitors

The plan was developed to address many of these needs and issues.

1. County, State, and Federal

The county, state and federal governments are responsible for much of the infrastructure of the island, including airports, harbors, roads, public parks, national parks, beaches; workforce development through Hawai'i Island Community College, University of Hawai'i; and tourism through Hawai'i Tourism Authority and Big Island Visitors Bureau.

The county, state, and federal governments contribute to all aspects of the vision, they include insuring a vital and sustainable economy, and to providing for the satisfaction of its residents. Parks and natural resources must be maintained for the benefit of residents and visitors. The more stakeholders respect each other and work together, the increased likelihood of success to achieve plan implementation.

a. Overall Priorities

- i. Sustain economic growth recognizing that 26% of Hawai'i Island economy is tourism based.
- ii. Maintain or increase resident satisfaction with their quality of life on Hawai'i Island.
- iii. Ongoing care of natural resources, including ocean resources.
- iv. Upkeep of sacred and historic sites. Cultural preservation.
- v. County and state need better coordination and increased cooperation to get plans funded and completed.
- vi. Plans need to be implemented in a timely fashion.

b. Visitor Support Needs

- i. Understand the carrying capacity of the island to provide quality of life for residents and quality of experiences for visitors.
- ii. Better understanding of the impact of timeshare, B&Bs, and TVRs. Regulate, if necessary, to maintain the quality of neighborhoods.

- iii. Legislation regarding liability issues of visitors/residents trespassing on public/private lands.
- iv. A method to identify "approved" guidebooks, websites, attractions, tour companies, etc. for their accurate information provided to visitors including where they should hike, cultural sites, protocol around sites, etc. This "approval" process will separate the legitimate, trustworthy, culturally attuned companies from the "fly-by-night" organizations.
- v. Appropriate targeting of visitors to Hawai'i recognizing the differences in accommodations in Kona vs. Hilo vs. North Hawai'i. Are there sufficient meeting rooms for business-related travel?
- vi. Needs more timely information to better plan for the future of Hawai'i Island.
- vii. Improved accommodations in Hilo.
- viii. Increasing flights in and out of Hilo.

c. Infrastructure Needs

- i. Planning for roads relative to development of new communities and resorts.
- ii. Funding to improve roads throughout the island, particularly addressing the congestion along the Kona Coast, and the Puna bypass road.
- iii. Funding to improve the harbors to support the SuperFerry and the cruise ships.
- iv. Funding to improve airports.
- v. Funding to improve facilities at public facilities, parks, and beaches.
- vi. Funding for improvements and maintenance of trails.
- vii. Funding to improve road signage as well as airport signage.
- viii. Funding to expand public transportation to reduce road traffic and enhance the movement of residents and visitors.
- ix. Funding for visitor safety in case of disasters.
- x. Legislation and/or rules to control trail usage or number of visitors at sites. To maintain the quality of the trails, as well as the experience.

2. Visitor Industry

This represents all aspects of industry directly or indirectly serving the needs of visitors. This is inclusive of the visitor associations, not-for-profit sectors, retailers, tour operators, transportation, as well as accommodations.

a. Workforce Needs

Currently, the unemployment rate on Hawai'i Island is very low.

- i. Mutual respect between workers and employers.
- ii. Livable wages – should be able to support a family without working two jobs.
- iii. Training on customer service and Hawaiian culture.
- iv. Career paths – employees need to know they can move up within the visitor industry.
- v. Transportation to and from work.
- vi. Affordable housing near employment centers.
- vii. Understanding of the benefits of working in the visitor industry.
- viii. Visitor industry and school partnerships for recruitment and workforce preparedness that would encourage more students to go into the visitor industry and have the skills necessary to succeed.

- ix. Certification process to reward employees who provide higher levels of service and share authentic cultural information.
- x. More interaction between UH-TIM, Kapiolani Community College, and UH-Hilo.
- xi. Cultural education to be able to answer visitor questions and to better understand the value of the host culture.

b. Employers Overall Needs

- i. Sufficient number of quality employees.
- ii. Continue to attract current number of visitors to sustain occupancy rates. Some growth in visitor accommodations expected by 2010.
- iii. Respect and support of Hawai'i Island residents.
- iv. High satisfaction levels among visitors.
- v. High satisfaction levels among employees.
- vi. Innovative approach to housing for employees.
- vii. Understand the carrying capacity of the island to provide quality of life for residents and quality of experiences for visitors
- viii. Maintain a unique sense of place for Hawai'i Island in order to attract visitors.
- ix. Appropriate targeting of visitors to Hawai'i Island - accommodations on island better suited toward the middle-market vs. luxury. Also, insufficient meeting rooms for business-related travel.

c. Large Business Needs

- i. Better regulation of B&Bs and TVRs to maximize the collection of TAT (Transient Accommodations Tax).
- ii. Better education of employees on Hawaiian culture to differentiate the visitor experience and increase understanding of the host culture for visitors, as well as employees.

d. Small Business Needs

- i. Access to visitors.
 - 1. Communicating directly to visitors is too expensive for small business people.
 - 2. Relationships with tour companies and cruise ships that require discounting of fees make it unlikely that these groups will frequent a small business.
 - 3. Lack of parking an issue for smaller communities.
 - 4. No map of small businesses to distribute to cruise passengers when they arrive in Hilo.
- ii. Visitors that differentiate between authentic experiences vs. created experiences.
- iii. Mom and Pop businesses are what make areas unique, they need to be supported by the visitor industry, not just drive-bys.
- iv. Arts industry needs access to the visitors.
- v. Develop cooperatives for small businesses, arts groups, neighborhood businesses and non-profits, Hawaiian cultural practitioners, etc. to work together to maximize efficiencies and improve contact with visitors.

e. Communities Other Than Kona

- i. Enhance Hilo's reputation as a cultural hub of the state.
- ii. Better maps of the Hilo area.
- iii. Market the unique aspects of Hilo and North Hawai'i to the visitors in Kona/Kohala resorts.
- iv. Develop Hilo into an eco-destination beginning at Banyan Drive.
- v. Promote unique Hawai'i to niche groups, such as groups desiring environmental education.

f. Cruise Needs

- i. Adequate harbor facilities.
- ii. Welcoming harbor facilities.
- iii. Adequate transportation options for visitors when they arrive in Hilo.
- iv. Quality experience on Hawai'i Island for its passengers.
- v. Continued beauty of Hawai'i Island and being welcomed by Hawai'i Island residents.

g. Visitor Attractions

- i. The number of visitors at any one time should not exceed a capacity level that is manageable and provides for an enjoyable experience.
- ii. Identify Hawaiian cultural sites that can be visited and those that are *kapu* as part of an interpretative plan.
- iii. Develop an interpretative plan for Hawai'i along with Hawaiian cultural practitioners and the resident community to include accurate inventory of natural resources and hiking trails for the public.
- iv. Support the Hawaiian music industry, including the Hawaiian Academy of Recording Arts.
- v. Cannabis Clubs.
- vi. Create a cultural center on Hawai'i.

3. Visitors

These represent all visitors to Hawai'i Island.

a. Overall Needs

- i. Memorable, authentic experience that cannot be achieved anywhere else in the world.
- ii. Accurate information to ensure safety and a quality experience.
- iii. Safety and security – ongoing safety in the streets, parks, in the water, as well as disasters. What to do in each situation?
- iv. Improve first impression at the airport and the harbor.
- v. Hawai'i Island residents that are welcoming and friendly – visitors want to be treated as a guest, not as an intruder. Want to connect with residents.
- vi. Clean, well-maintained, and easily accessible restroom facilities around the island including parks, beaches, and visitor attractions.
- vii. Certification of tour guides.
- viii. Improved signage throughout the island.

b. First Time Visitor Needs

- i. Experience that matches or exceeds expectations, do not need unrealistic expectations.
- ii. Unique experience that only Hawai'i Island can offer.
 - 1. Historic sites
 - 2. Hawai'i Island people
 - 3. Smaller towns and larger resorts
 - 4. Natural environment for exploring – hikes, snorkeling, sightseeing

c. Repeat Visitor Needs

- i. Quality of environment and experiences to be the same or better than first experienced.
- ii. Ongoing festivals that attract visitors every year.
- iii. New attractions and experiences:
 - 1. New outdoor experiences
 - 2. Health and Wellness
 - 3. Agri-tourism
 - 4. Eco-tourism

d. Cruise Visitor Needs

- i. Visit the highlights of Hawai'i Island within a day:
 - 1. Convenient transportation on island.
 - 2. Historic sites are not overly crowded.
 - 3. Hawaii Volcanoes National Park – currently cannot accommodate all cruise ship visitors at one time to their facility – need to spread out over a day?
 - 4. Sufficient restroom facilities – number and quality.
 - 5. Authentic experiences – where are they? How to access them?

4. Residents

a. Overall Needs

- i. Respect from visitor industry – residents feel disenfranchised from the success of the visitor industry. Lack of communications on how the visitor industry benefits them. How does the industry give to the community?
- ii. Respect from visitors – visitors need to be educated prior to arriving on island, such as movies, guidebooks, etc., that provide protocol and insights into the “local style” and appropriate respect for cultural and historic sites.
- iii. Two-way communications with the industry and government.
- iv. Outlet for frustration – a positive communications process must be put in place for government to “hear” residents.
- v. Respect and recognition of all the cultural experiences of Hawai'i Island.
- vi. Provide and maintain quality parks, natural environment and facilities for hiking, going to the beach, picnicking. Private places to remain private.
- vii. Clean, well-maintained, and easily accessible restroom facilities around the island, including parks and beaches. Prevent vandalism.
- viii. Enforce the established park rules.
- ix. Feel safe in their own communities.
- x. Eliminate laws against growing and using marijuana.
- xi. More pedestrian and bike access in communities.

b. Hawaiian Community

- i. Promote awareness of culturally significant sites with reasonable access guidelines and protocol instructions.
- ii. All stakeholders require more understanding of the Hawaiian culture.
- iii. Need to feel an integral part of all industries on the island, especially the visitor industry.
- iv. Perpetuate Hawaiian culture by conducting and publishing oral histories from Hawai'i *kūpuna* and inspiring young people to continue native Hawaiian practices.
- v. Improved recycling.

c. Larger Property Owners Needs

- i. Legislation to manage the liability issues of trespassers on private property.
- ii. Guidebooks that do not encourage visitors to hike on private property.
- iii. Tour companies that are respectful of private property.

d. Farmers

- i. Grow agri-tourism where the farmer benefits directly from visitors.
- ii. Enhance the relationships between farmers and restaurants.

D: Strategies for Future Consideration

During the planning process, the advisory committee identified a variety of strategies to help achieve plan objectives. Core strategies to be implemented over the next three years are included in the plan. The remaining strategies are listed below for future consideration.

Objective 1: To increase the economic contribution of the visitor industry to Hawai'i Island and its communities.

- **Initiate higher assessment fees for cruise-based visitors disembarking to the island in both Hilo and Kona to generate funding to improve harbors.**
- Target visitors to the Island especially those most likely to travel during the shoulder periods: Health and Wellness, Golfers, and Honeymooners.
- Support the initiatives developed in the Envision Hilo Plan issued in December 2005. The highlights include: a) Keeping Hilo's small town charm. b) Minimizing automobile traffic and encouraging walking and biking paths. c) Expand activities throughout the week and into the night hours. d) Expanding festivals and activities to attract more people into Hilo Town. (Envision Hilo staff)
- Provide incentives and training for older businesses to remain competitive over time. Focusing on those family businesses that reflect the sense of place of local communities.

Objective 2: To make positive contributions to the quality of life for residents, such as:

- Putting "community first"
 - Helping to ensure communities retain their sense of place, including recognizing multi-cultural diversity
 - Providing increased business opportunities
 - Providing workforce housing opportunities
- Develop and sustain education in Hawaiian culture and history that contribute to the visitor industry. Starting in elementary education through college, and beyond in continuing education.
 - Develop a certification program that acknowledges greater knowledge of the Hawaiian culture and history, so that it provides a way for employees to earn a higher salary because they provide a better experience for visitors. Ensure recognition and reward within the workplace.
 - Attract visitors to the Island who will respect Hawaiian culture, local customs, traditions, and island, who will participate in activities to gain greater knowledge of Hawai'i Island.

Objective 3: To increase communications, interactions and understanding between stakeholder groups, especially between residents and the visitor industry.

- Develop a campaign to rally residents around the goals of the TSP – the connection between healthy land, healthy people, quality of life and quality of visitor experiences.
- Communicate the importance of the visitor industry by launching a public awareness campaign (ex. Hawaiian culture): to residents; to legislators and to funders.

Objective 4: To maintain and improve visitor satisfaction with their experience on Hawai'i island.

- Implement an island-wide initiative to bring “Aloha Spoken Here” to life on Hawai'i Island. Ex. recognition, education, training, communication, airports/piers, and reward.
- Provide adequate ground transportation options for visitors, including rental cars, buses, etc.
- Increase the number and quality of activities offered to visitors: a) manage capacity and infrastructure, b) do what the locals do without negatively impacting experiences.

Objective 5: To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of our host culture.

- Develop a process to define authentic Hawaiian.
- Encourage hotels and activities to provide authentic experiences for visitors and residents.
- Connect Hawaiian cultural practitioners with the visitor industry and encourage meaningful interconnections that benefit both groups.

Objective 6: To support the enhancement and maintenance of the natural resources of Hawai'i Island.

- Create “off-site” learning opportunities for residents and visitors to understand the natural environment without impacting it directly.
- Develop world class eco-tourism opportunities, including effective Internet outreach.
- Seek recognition as a world heritage site, specifically in areas that are supported by local residents. Ex. state parks recognized on world heritage web site.

E: Hawai'i Island TSP Strategies by State TSP Strategic Initiatives

The State TSP is comprised of nine strategic initiatives. The initiatives are Access, Communications and Outreach, Hawaiian Culture, Marketing, Natural Resources, Research and Planning, Safety and Security, Tourism Product Development, and Workforce Development. To demonstrate how the Hawai'i Island TSP complements the State Plan, the strategies included in this plan are cross-referenced by State Initiatives.

Access

- Support programs that make airports more welcoming to arriving and departing passengers. (Strategy 1.d.)
- Support harbor and pier improvements to ensure Hawai'i Island facilities can meet the anticipated increasing needs. (Strategy 1.e.)
- Encourage coordination, collaboration, and improvement in public transportation services for both residents and visitors. (Strategy 2.d.)
- Together with the community development efforts described in 1.b. support the development of consistent, accurate signage to provide easy directions and identify communities, historical sites, and dangerous areas. Provide interpretive methods to educate and enhance cultural, natural, and historical sites. (Strategy 4.c.)

Communications and Outreach

- Support efforts to develop educational programs in basic workforce readiness (such as communications skills, basic computations, and computer literacy). (Strategy 2.b.)
- Enhance awareness and understanding of the Hawai'i Island Tourism Strategic Plan, particularly highlighting the opportunities and future success of the community-based projects (noted in strategy 1.b.). (Strategy 3.a.)

Hawaiian Culture

- Advocate for and support the development of a means of educating visitors prior to or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources. (Strategy 4.a.)
- Encourage and support the implementation of an island-wide initiative to bring a *Hawaiian sense of place* to life on Hawai'i Island. (Strategy 4.b.)
- Encourage the development of programs to recognize and share Hawaiian culture and history to support an informed and knowledgeable community: (Strategy 5.a.)
 - i. Continue "Keep It Hawai'i" reward program to recognize authentic Hawaiian culture.
 - ii. Promote proper pronunciation, spelling, and use of Hawaiian words.
- Advocate for appropriate interpretive signage and educational information in public places. (Strategy 5.b.)
- Expand the number and quality of Hawaiian cultural festivals and events. Support events in the development stage to become self-supporting and then work with groups developing new festivals and events. (Strategy 5.c.)
- Support programs to provide training and certification for people who interpret natural resources through appropriate signage, and information materials. Where appropriate, ensure the conservation and natural resources messages are clearly linked to Hawaiian culture. (Strategy 6.b.)

Marketing

- Develop and implement an annual tourism marketing plan aimed at desired target consumer and business markets. (Strategy 1.a.)
- Advocate for and support the development of a means of educating visitors prior to or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources. (Strategy 4.a.)
- Expand the number and quality of Hawaiian cultural festivals and events. Support events in the development stage to become self-supporting and then work with groups developing new festivals and events. (Strategy 5.c.)

Natural Resources

- Advocate for appropriate interpretive signage and educational information in public places. (Strategy 5.b.)
- Develop an inventory of the natural areas identifying those that are determined appropriate for access. Then develop plans for protection, education, and management. (Strategy 6.a.)
- Support programs to provide training and certification for people who interpret natural resources through appropriate signage, and information materials. Where appropriate, ensure the conservation and natural resources messages are clearly linked to Hawaiian culture. (Strategy 6.b.)

Research and Planning

- County Department of Research and Development will oversee the implementation of this plan with the assistance of an oversight committee. (Strategy 7.a.)
- Develop additional measures for tracking the impact of plan. (Strategy 7.b.)

Safety and Security

- Advocate for and support the development of a means of educating visitors prior to or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources. (Strategy 4.a.)
- Support efforts to increase safety and security for visitors and residents at public places, such as beach parks, events, and cultural sites. (Strategy 4.d.)
- Support the development of a process by which visitors can access information (multi-lingual) in case of an emergency, natural disaster, etc. (Strategy 4.e.)

Tourism Product Development

- Support community-based development as a means of generating economic activity island wide, while providing visitors with a greater number and variety of experiences, and residents with a vehicle to enhance and enjoy their communities. (Strategy 1.b.)
- Encourage renovation of visitor-oriented properties, particularly in Kona, Hilo, and the Kohala Coast to improve the quality of visitor accommodations. (Strategy 1.c.)
- Support local businesses and producers to better promote their local products, services and activities to visitors and the industry. Provide incentives and better enable visitor industry companies to buy local. (Strategy 2.a.)
- Advocate for and support the development of a means of educating visitors prior to or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources. (Strategy 4.a.)
- Implement programs to help ensure the attractiveness of beaches and parks. (Strategy 4.f.)

Workforce Development

- Develop and support programs that build a sufficient and qualified visitor industry workforce. (Strategy 1.f.)
- Support efforts to develop educational programs in basic workforce readiness (such as communications skills, basic computations, and computer literacy). (Strategy 2.b.)
- Develop a Hawai'i Island program that recognizes and rewards: (Strategy 2.c.)
 - i. Visitor Industry employees for acquiring greater knowledge of Hawaiian culture and history.
 - ii. Local business producers who have successfully increased sales to the visitor industry.
 - iii. Visitor industry companies that reflect the "Hawai'i Island sense of place."
- Support efforts underway to identify solutions to the lack of affordable workforce housing. (Strategy 2.e.)
- Encourage the development of programs to recognize and share Hawaiian culture and history to support an informed and knowledgeable community: (Strategy 5.a.)
 - i. Continue "Keep It Hawai'i" reward program to recognize authentic Hawaiian culture.
 - ii. Promote proper pronunciation, spelling, and use of Hawaiian words.
- Expand the number and quality of Hawaiian cultural festivals and events. Support events in the development stage to become self-supporting and then work with groups developing new festivals and events. (Strategy 5.c.)

F: Definition of Sustainable Tourism

What is Sustainable Tourism?

It's informative. Travelers not only learn about the destination, they learn how to help sustain its character while deepening their own travel experiences. Residents learn that the ordinary and familiar may be of interest and value to outsiders.

It supports integrity of place. Destination-savvy travelers seek out businesses that emphasize the character of the locale in terms of architecture, cuisine, heritage, aesthetics, and ecology. Tourism revenues in turn raise local perceived value of those assets.

It benefits residents. Travel businesses do their best to employ and train local people, buy local supplies, and use local services.

It conserves resources. Environmentally aware travelers favor businesses that minimize pollution, waste, energy consumption, water usage, landscaping chemicals, and unnecessary nighttime lighting.

It respects local culture and tradition. Foreign visitors learn about and observe local etiquette, including using at least a few courtesy words in the local language. Residents learn how to deal with foreign expectations that may differ from their own.

It does not abuse its product. Stakeholders anticipate development pressures and apply limits and management techniques to prevent the "loved to death" syndrome. Businesses cooperate to sustain natural habitats, heritage sites, scenic appeal, and local culture.

It strives for quality, not quantity. Communities measure tourism success not by sheer numbers of visitors, but by length of stay, money spent, and quality of experience.

It means great trips. Satisfied, excited visitors bring new knowledge home and send friends off to experience the same thing, which provides continuing business for the destination.

Source: National Geographic Online

G: Glossary of Terms

Accommodations Classifications: There are four categories of accommodations: budget, standard, deluxe, and luxury - ranging from lowest priced room rates to highest priced room rates.

Agri-Tourism: Refers to the act of visiting a working farm or any agricultural, horticultural, agribusiness or ranching operation for the purpose of enjoyment, education, or active involvement in the activities of the farm or operation.

Aloha (welcome): "Alo" is to face, to join, to be one with, and "Ha" is the breath of life; together they manifest the intangible spirit of the people of this land. In addition to hello and goodbye, aloha means love, compassion, affection, mercy, pity, sympathy, grace, sentiment, charity and kindness.

Aloha Spirit: Is the multicultural expression of aloha, involving the highest ideals of various ethnic groups that make up our multi-ethnic society. It is the way of life in the value system we have developed as a caring, multi-ethnic community.

Authentic: Those experiences and opportunities that have time depth in expressing, documenting and conveying culture, practice and history, that which is culturally "responsible" to the culture being depicted (i.e. authentic Hawaiian culture).

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

Carrying Capacity: The maximum number of individuals that a given environment can support without detrimental effects.

De Facto Population: An estimated number of people who are actually present in one place at one time.

Domestic Visitor: Visitor who stayed in Hawai'i for at least one night but less than one year, arriving on flights from the U.S. mainland. A foreign resident from the U.S. mainland is counted as a domestic visitor.

Eco-tourism: Tourism involving travel to areas of natural or ecological interest, typically under the guidance of a naturalist-interpreter, for the purpose of observing wildlife and learning about the environment.

Gross County Product (GCP): Represents the total value of the goods and services produced by the county's economy.

Hawaiian Cultural Practitioner: A person who demonstrates rich and deep knowledge of the culture and history of Hawai'i by bringing it to life through the continuation of traditional practices, storytelling, blessings, song, chant, and dance. Hawaiian teachings include conflict resolution, spirituality, sacred wisdom, and living in balance with the earth -- a philosophy and a lifelong commitment to the land and the people of Hawai'i.

Infrastructure: The facilities that must be in place in order for a country or area to function as an economy and as a state, including the capital needed for transportation, communication, and provision of water and power, and the institutions needed for security, health, and education.

International Visitor: Visitor who stayed in Hawai'i for at least one night, but less than one year, arriving on flights from U.S. territories and foreign countries. A U.S. resident arriving in Hawai'i on a flight directly from a foreign country is counted as an international visitor.

Per-Party Per-Trip: Total spending of the entire members of the party throughout their stay.

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

Sense of Place: The tangible and intangible qualities of one's community which provide and promote continuity to identity, history and attachment to the natural, cultural, and historical landscape.

Shoulder Periods: Periods of relatively lower hotel occupancy.

Stakeholders: Defined as individuals or organizations that stand to gain or lose from the success or failure of a system.

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

Visitor Days: Total number of days visitors are on the island and/or in the state.

H: Listing of Agencies

County of Hawai'i

BIISC	Big Island Invasive Species Committee is a voluntary partnership of private citizens, community organizations, businesses, land owners, and government agencies such as the US Fish and Wildlife Service, the US Forest Service, Institute of Pacific Island Forestry, the State of Hawai'i Department of Land and Natural Resources, the University of Hawai'i, the Research Corporation of the University of Hawai'i, and the Pacific Cooperative Studies Unit united to address invasive species issues on the island of Hawai'i.
BIVB	Big Island Visitors Bureau promotes the interests of Hilo and West Hawai'i and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions, on the Big Island.
County Civil Defense	The role of the Civil Defense Agency is to direct and coordinate the development and administration of the county's total emergency preparedness and response program to ensure prompt and effective action when natural or man-caused disaster threatens or occurs anywhere in the County of Hawai'i.
DPR	Department of Parks and Recreation administers, supervises, and maintains all public parks, recreational facilities, playgrounds, and appurtenant equipment and supplies owned, possessed, or controlled by the county.
HCC	Hawai'i Community College is an accredited college that offers programs, courses, and activities to fulfill the diverse educational, training, and community needs of the residents of the island, as well as the State of Hawai'i.
HIEDB	Hawai'i Island Economic Development Board is a non-profit networking business organization that specializes in facilitating federal resource programs and implementing economic development projects. HIEDB provides valuable information and contacts for area businesses and industries, as well as key liaison to federal, state, county and private sector resources in financing, business planning, permitting, legal advice, and other business services.
Hawai'i Volcanoes National Park	Hawai'i Volcanoes National Park preserves for the enjoyment, education, and inspiration for future generations, with significant resources that reflect Hawai'i's geological, biological, and cultural heritage. The park encompasses two active volcanoes that provide tours and educational programs, while perpetuating the Hawaiian culture and history.
BIPD	Big Island Police Department preserves the public peace, prevents and detects crimes, arrests offenders, protects the rights of persons and property, enforces and prevents violations of the law, and services in civil and criminal proceedings.
Mayor	Chief executive officer of the county exercises the executive powers of the county and responsible for enforcing the provisions of and executing the duties conferred by the Charter, ordinances, and other applicable laws, and coordinating the drafting of the operating and capital improvements budget.
OHCD	Office of Housing and Community Development is responsible for the planning, administration and operation of all of the County of Hawai'i's housing programs such as the Section 8 rental assistance for qualified families. Its overall goal is to provide for the development of viable communities in Hawai'i County by providing decent housing, suitable living environments and expanding economic opportunities.
PD	Planning Department prepares a proposed general plan to guide the development of the county and administers zoning and subdivision ordinances and regulations.
R&D	Department of Research and Development provides the data necessary for managerial and legislative programs and guidance on public or private development programs that enhance improvement of the county community.

Hawai'i State & Other Agencies

AOHT	The Academy of Hospitality & Tourism program, based on a national curriculum and program developed by the National Academy Foundation (NAF), targets students from the tenth to the twelfth grade and is designed to provide hands-on learning experiences for students who are interested in the field of travel and tourism.
AOTT	Academy of Travel and Tourism is a nationally recognized career exploration, awareness and mentoring program for high school juniors and seniors. AOTT students have opportunities for paid internships with local businesses, community service projects, familiarization trips, industry tours, scholarships and other experiences.
CBED	Community Based Economic Development program offers loans, grants and technical assistance to eligible non-profit, geographic, cultural or economic-based community groups. These groups can develop viable, sustainable business ventures that serve local needs and are compatible with the vision, character and cultural values of their communities. This program is sponsored by DBEDT, State of Hawai'i.
CPEP	County Product Enrichment Program was introduced in 2002 to create a partnership between HTA and the Counties of Hawai'i, Honolulu, Kaua'i and Maui, to support endeavors to diversify Hawai'i's tourism activities in the niche areas of agri-tourism, cultural tourism, eco-tourism, edu-tourism, health & wellness tourism and techno-tourism, while also fulfilling the goals and objectives of each county's tourism program. HTA oversees, supports and directs the program, while the counties manage the day-to-day operations.
CTAHR	College of Tropical Agriculture and Human Resources assists students and all citizens of Hawai'i for life in the global community through research and educational programs supporting tropical agricultural systems that foster viable communities, a diversified economy, and a healthy environment.
DBEDT	Department of Business, Economic Development and Tourism works to diversify the economy, expand existing business, and attract new economic activity.
DLIR	Department of Labor and Industrial Relations administers programs that improve job opportunities, protect workers' employment rights, and assure a safe and healthy work environment.
DLNR	Department of Land and Natural Resources manages the state's public lands and the water and mineral resources on those lands and the State's aquatic life and wildlife resources, forest reserves, state parks, and small boat harbors; administers the state conservation districts and the endangered species, natural area reserves, boating and ocean recreation, and historic preservation programs. Includes Aquatic Resources Division (DAR), Division of Boating and Ocean Recreation (BORD), Division of Conservation and Resource Enforcement (DOCARE), Division of Forestry and Wildlife (DOFAW), State Historic Preservation Division (SHPD), Natural Area Reserves System Commission (NABS), and Divisions for Land, Parks, and Trails and Access.
DOE	Department of Education manages the statewide systems of public schools and public libraries, and includes such programs as the high school-level Academy of Travel and Tourism (AOTT).
DOT	Department of Transportation is responsible for the establishment, maintenance, and operation of transportation facilities for the state to provide a system of integrated transportation facilities, which include highways, airports, and harbors. Includes Airports, Harbors and Highways Divisions, and Visitor Information Program Office.
DPW	Department of Public Works is responsible for all matters relating to engineering; public and private building construction and inspection; construction, inspection and maintenance of public streets, highways, bridges and drainage facilities; acquisition of public and private properties for public purposes; design, operation, and maintenance of traffic signals and traffic control devices; and all other public works projects, except for matters relating to parks and recreation, environmental management, and water supply.
HCC	Hawai'i Convention Center provides event and business services.

HCCH	Hawaiian Civic Club of Honolulu is responsible for and dedicated to the education of the Hawaiian, the elevation of his social, economic and intellectual status as they promote the principles of good government, outstanding citizenship, and civic pride in the inherent progress of Hawai'i and all her people.
HDOA	Hawai'i Department of Agriculture assists in the development and expansion of agricultural industries through data collection and information dissemination, as well as promotional and marketing efforts.
HHLA	Hawai'i Hotel and Lodging Association is a statewide trade association of hotels, hotel management firms, hotel owners, suppliers, and other related firms and individuals. Mission of the HHLA is to 1) advocate the needs of its members with federal, state, and county governments; 2) provide educational opportunities, timely information and appropriate resources to members, legislators, media and the community; 3) provide a wide range of economic benefits and preferred services to its members; and 4) support and contribute to a better quality of life and environment for the community and visitors.
HTA	Hawai'i Tourism Authority strengthens Hawai'i's vital visitor industry by formulating policy, conducting research, coordinating development and implementation of the Tourism Strategic Plan, supporting product development and coordinating the worldwide marketing of Hawai'i as a visitor destination.
HVCB	Hawai'i Visitors and Convention Bureau is a non-profit marketing organization with visitor industry and general business representation. The Hawai'i Tourism Authority selected HVCB for marketing management services in the North America Major Market Area and Corporate Meetings and Incentives.
LUC	Land Use Commission implements the designation of areas into one of four major land use districts: urban, rural, agricultural, and conservation. Serves as a quasi-judicial body in administering the State land use law.
NaHHA	Native Hawaiian Hospitality Association is a non-profit organization of individuals, corporate organizations and institutions with an interest in the visitor industry and hospitality issues. NaHHA works to encourage the preservation and perpetuation of Hawaiian values, customs, language and artifacts; to incorporate the principles of ho'okipa and aloha into the operating culture of visitor industry enterprises; and to assist native Hawaiians in achieving success in tourism and hospitality endeavors that are culturally sensitive, environmentally sustainable, and economically beneficial.
OHA	Office of Hawaiian Affairs advocates for Hawaiians in the state legislature, state and federal courts, in the United States Congress, and in the local media, as well as by supporting community initiatives and interests related to native Hawaiians.
SBA	U.S. Small Business Administration is an independent agency of the federal government to aid, counsel, assist and protect the interests of small business concerns, to preserve free competitive enterprise and to maintain and strengthen the overall economy of our nation.
TNC	The Nature Conservancy of Hawai'i works to preserve the plants, animals, and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.
UH	University of Hawai'i provides all qualified people in Hawai'i with an equal opportunity for quality college and university education and training. Includes campuses in Mānoa and Hilo.
UH-TIM	School of Travel Industry Management provides training for students interested in working in the travel industry.
VASH	Visitor Aloha Society of Hawai'i, its mission is to share the aloha spirit with visitors victimized by crime or adversity.

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