



O'AHU
TOURISM STRATEGIC PLAN
2006-2015



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I. Executive Summary

The *O'ahu Tourism Strategic Plan: 2006-2015 (O'ahu TSP)* reflects the desires and input of O'ahu 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 O'ahu Tourism Strategic Plan Advisory Committee, with members representing a broad range of tourism stakeholders on O'ahu.

O'ahu is the core of tourism for the state, attracting more visitors than any other island. Total O'ahu visitor days and visitor arrivals are almost equal to all other islands combined. Likewise, O'ahu has the greatest number of international visitors. Total visitor arrivals peaked in the 1990s; more recently there has been a decline in international visitors somewhat offset by increases in domestic visitors.

O'ahu is the only island in the state to provide visitors with a Hawaiian experience within a more urban setting. Its diverse multi-cultural population and history offer visitors a range of activities and historical sites to experience. The concentration of visitor accommodations within Waikīkī provides the critical mass required to support the large number of restaurants, activities and retail stores within the area. Waikīkī is the heart of the visitor industry on O'ahu.

The vision for tourism on O'ahu is similar to that of the state, recognizing that a successful, sustainable visitor industry is one that is balanced and respectful of its residents, natural environment and host Hawaiian culture:

Tourism on O'ahu will:

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

O'ahu is the most populated island, with approximately 80% of total state residents. With a visitor-to-resident population of one to ten, residents outside of Waikīkī are somewhat less impacted by the visitors overall, except in some communities where a growing number of visitor Bed & Breakfasts and Individual Vacation Units are changing the nature of these smaller communities, to the dismay of many local residents. The following are other major challenges and opportunities facing visitor industry stakeholders on the island.

Challenges

- The number of visitor units available on O'ahu has actually decreased between 2004 and 2005, primarily due to the renovation of several older Waikīkī properties and the transition from hotel to condominium properties. Given the high occupancy levels of the past two years, O'ahu may not have a sufficient number of units to attract significantly more visitors to the island.
- The spread of illegal Bed & Breakfasts as well as Individual Vacation Units into residential neighborhoods is creating additional traffic, and diminishing the quality of life for community residents. Stronger regulation and enforcement of these illegal units is being sought by community members.
- The aging infrastructure of O'ahu and Waikīkī has placed the number one visitor attraction, Waikīkī Beach, at risk. When anything negatively affects this beach, it generates national coverage and severely affects visitor satisfaction and potential visitor perceptions of the state.
- Visitor satisfaction for O'ahu is relatively low compared to the other islands. This may be due to O'ahu being a more mature destination with few new activities for visitors, especially given the increasing trend for more repeat visitors.
- Finding ways to honor and share the host Hawaiian culture, and all of Hawai'i's diverse cultures, in an appropriate and respectful manner continues to be a goal for visitor industry stakeholders.

Opportunities

- Waikīkī is currently undergoing a significant revitalization of hotel accommodations, retail and public spaces. In early 2007, the Hawai'i Visitors and Convention Bureau will launch a major campaign introducing the revitalized Waikīkī to the world. This re-launch will create new interest in and opportunity for the O'ahu visitor industry.
- Communities around O'ahu are being reborn, building on their history and sense of place. The Chinatown renovation is an example of a community that has worked together to revitalize their businesses and stimulate interest in the history of the area, attracting both residents and visitors. Other communities are working on plans to undergo similar new beginnings. These revitalizations will provide visitors and residents with more to explore and experience.
- O'ahu is the business center of the state and has the capacity to host large conventions with 1.1 million square feet of total meeting space in one area. The Hawai'i Convention Center, situated at the entrance to Waikīkī, is ideal to host large conventions and conferences to meet the needs of the convention, meeting and incentive markets.
- O'ahu already offers an abundance of activities, events, festivals and other experiences. The continuation of these activities, as well as support for new offerings like agri-tourism and the expansion of culture and arts programs, creates new opportunities for residents and visitors to enjoy the island.

The Plan

There are seven equally important objectives in the O'ahu TSP that were developed to achieve the vision for tourism:

1. To increase the economic contribution of the visitor industry to O'ahu.
2. To make positive contributions to the quality of life for residents.
3. To increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.
4. To maintain and improve visitor satisfaction with their experience on O'ahu.
5. To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of this culture.
6. To support the enhancement and maintenance of the natural resources on O'ahu.
7. To establish an oversight mechanism for ensuring implementation and tracking of the plan, including regular reviews and plan revisions as necessary.

Each of the objectives has accompanying strategies and high-level performance benchmarks to track the progress made against the objectives. Each of the strategies is supported by detailed action plans, available in a separate document, which include specific actions, an identified recommended lead agency and supporting organizations, as well as desired outputs.

The O'ahu TSP establishes an overall direction for tourism stakeholders to move forward in a coordinated and complementary path. To ensure success, this plan must continue to be embraced and supported by residents, state and county governments, and all tourism stakeholder groups. Additionally, other plans and processes should also be integrated with this plan to ensure consistency and progress toward achieving the tourism vision.

II. Introduction and Background

The O'ahu Tourism Strategic Plan 2006 -2015 (O'ahu TSP) reflects the collective feedback and input of island residents, the visitor industry, state and county governments, cultural organizations, educational institutions, and many others in public and private sectors. Additionally, numerous plans, news articles, reports, data, research and other related information were reviewed and considered in the development of this plan.

A. Purpose of the Plan

The O'ahu Tourism Strategic Plan:

- Reflects the vision, overall direction and priorities of the City and County of Honolulu, and is based on local knowledge and desires of visitor industry representatives, government officials and community residents.
- Establishes an overall direction for O'ahu visitor industry stakeholders to move forward in a coordinated and complementary path.
- Assists county, state (including the Hawai'i Tourism Authority – HTA), and federal government decision-makers in developing policy and in allocating resources to improve the visitor industry and tourism product on O'ahu.
- Will be integrated with other plans and processes to create opportunities for partnerships.

B. State and County Plans

To ensure a vital, competitive, and sustainable visitor industry, benefiting both residents and visitors, the *State Tourism Strategic Plan: 2005 – 2015 (State TSP)* was developed with statewide community input and completed in 2004. During the State TSP planning process, the need for county-level tourism strategic plans was identified. The development of county tourism strategic plans began during the summer of 2005 and was completed just over a year later.

C. Development Process

The O'ahu TSP planning process commenced with the support of Mayor Mufi Hannemann who appointed the City and County of Honolulu Office of Economic Development (OED) as the lead agency in this effort, and invited members of the community to be part of a planning advisory committee. Advisory committee members represented a broad range of interests including the visitor industry, state and county governments, cultural organizations, educational organizations, and others in private and public sectors. The advisory committee provided input, oversight, and direction throughout the planning process.

Input from the community was received during meetings held from November 2005 through January 2006. The public also provided input into the draft O'ahu TSP that was posted online in September 2006.

A timeline of key events during the O'ahu TSP 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 City and County Office of Economic Development (OED) will drive successful implementation of this plan. Members included representatives from the O'ahu Visitors Bureau, the Waikīkī Improvement Association and other organizations to ensure the participation and support of affected 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 visitor industry's future on O'ahu. The monitoring of plan performance will also be a key part of the oversight process, including the collection, review and development of scorecard measures, and reporting to the public of progress toward meeting plan objectives.

III. Overview of Tourism

A. State Level

1. Historical Trends

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

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

Tourism touches nearly all aspects 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 Hawai'i tourism is booming, new opportunities and challenges emerge 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, protect and perpetuate native Hawaiian culture, the indigenous culture of the land and seas of Hawai'i.

¹ DBEDT Monthly Visitor Statistics 2005 and 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, starting in October 2005, due to lower demand. Additionally, the increased cost of oil will continue to affect ticket prices, which affects destinations like Hawai'i that require longer flights.

- *Maximizing 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 continue to support the economy by actively experiencing what the islands have to offer.

- *Visitor Satisfaction*

For years, Hawai'i has been successful as a 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 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

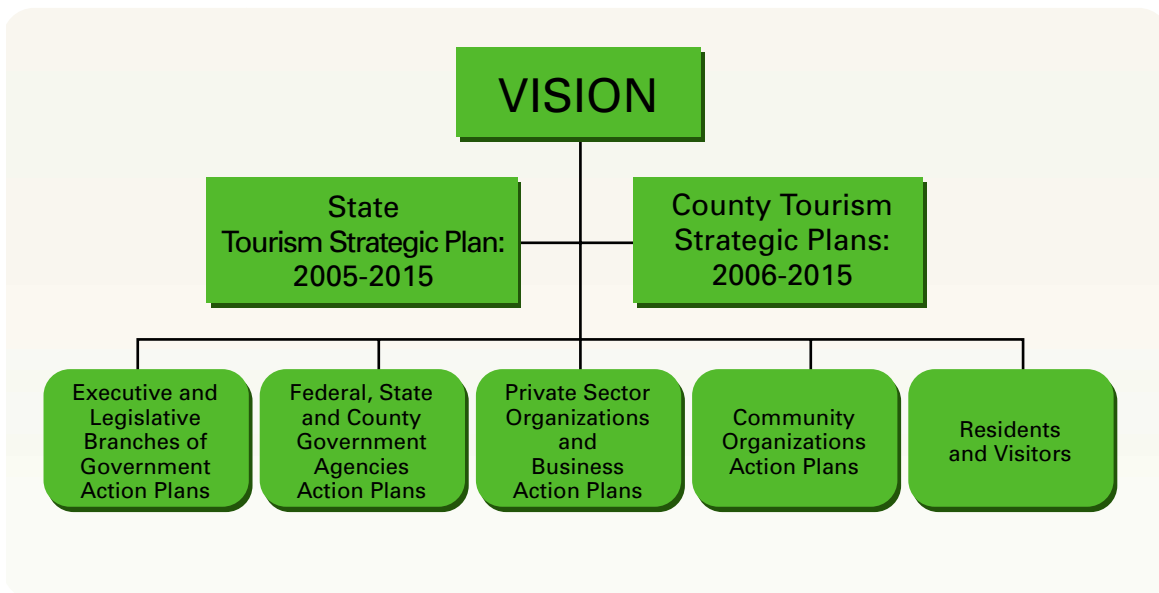
⁵ State of Hawai'i Department of Labor and Industrial Relations

- Managing State and County Issues

Hawai'i tourism is much more complicated today than when it was in its infancy, and 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 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 O'ahu

The island of O'ahu receives the largest number of visitors of all the Hawaiian Islands. Waikīkī Beach and Diamond Head are world-renowned. The Arizona Memorial, 'Iolani Palace, the Pali Lookout, the North Shore and other sites provide unique and memorable experiences. More than any other island, O'ahu offers an urban, city experience combined with a large, diverse array of activities and natural beauty.

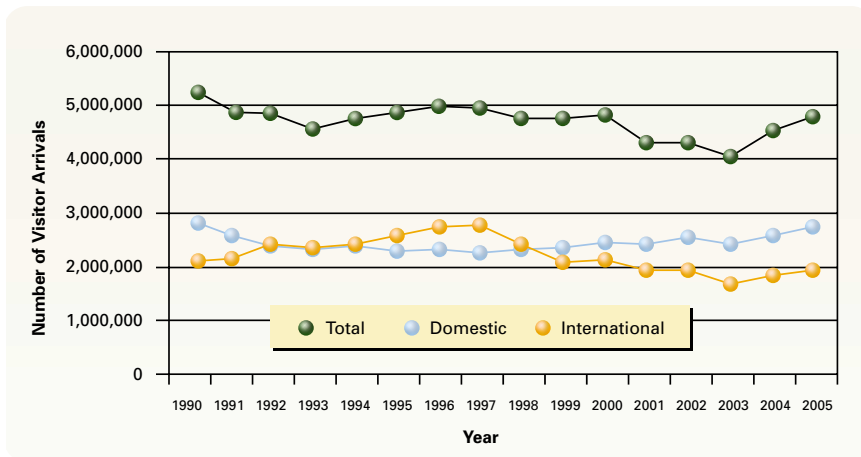
O'ahu draws the highest number of first-time visitors and international travelers, especially Japanese visitors who are attracted to the extensive shopping opportunities on the island.

O'ahu is also the business center of the state and has the capacity to hold large conventions with 1.1 million square feet of total meeting space in one area. The Hawai'i Convention Center, situated at one end of Waikīkī, is ideal to host large conventions and conferences that target the needs of the convention, meeting, and incentive markets.

1. Visitor Statistics

O'ahu continues to draw the largest number of visitors to the state among all the islands. Total O'ahu visitor arrivals and visitor days almost equal all the other islands combined. O'ahu also has the greatest number of international visitors, with the majority traveling from Japan.

Chart 2: Visitor Arrivals to O'ahu⁶



⁶ DBEDT Monthly Visitor Statistics 2005, December

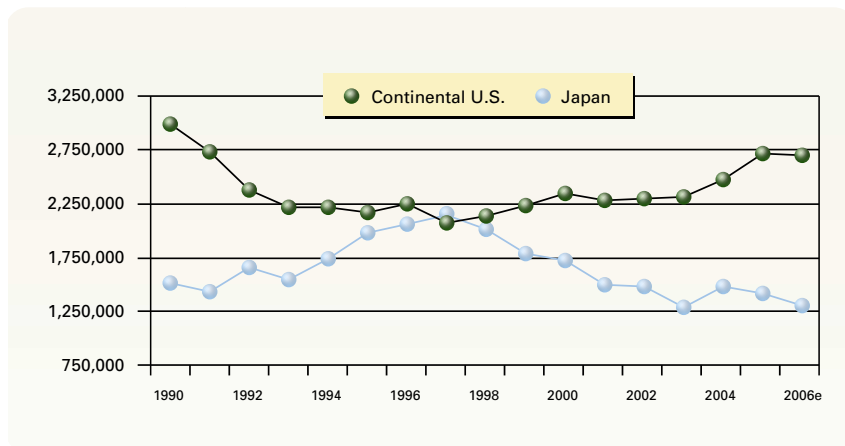
Through the 1980s, O'ahu was the first and most frequently visited island by tourists vacationing in the state. This was primarily due to the capacity of the Honolulu International Airport (HIA) for domestic and international flights, as well as travelers familiar with famous sites on O'ahu. Now with direct flights into the islands of Maui, Hawai'i and Kaua'i, as well as the greater awareness of these destinations among travelers, O'ahu has increased competition for visitor arrivals to the state.

As shown in Chart 2, the number of visitors to O'ahu declined from 1990 through 2003, with an upturn in arrivals beginning in 2004. In 2005, total visitor arrivals were up 6.4% over the previous year, but still did not exceed total visitor arrivals in 1990.⁷

The mix of visitors to O'ahu has also changed over the past fifteen years. The Japanese market peaked in the late 1990s and it has steadily declined as the domestic market has increased (see Chart 3). Reasons for this decline include:

- Higher ticket prices to travel to Hawai'i with airline imposed fuel surcharges adding as much as \$200 per ticket from Japan;
- Fewer air seats available between Hawai'i and Japan;
- Challenges in reserving hotel rooms when overall occupancy levels have been very high; and
- Increased competition from other destinations such as Southeast Asia.⁸

Chart 3: Arrivals of Japanese and Continental U.S. Visitors to O'ahu⁹



⁷ DBEDT Island Highlights December 2005

⁸ Arakawa, Lynda. "Fewer Japanese tourists arriving." *Honolulu Advertiser*: 1 August 2006.

⁹ DBEDT Monthly Visitor Statistics 2005, December

¹⁰ DBEDT Monthly Visitor Statistics 2005, December

¹¹ DBEDT Long-term Forecasts 2005, December

Domestic (U.S.) travelers spent an average of 7.59 days on island, compared with only 5.89 days for the International visitor in 2005.¹⁰

In 2005, the resident population was about 873,443, with an average of 91,507 visitors per day on island.¹⁰ This means that on average, there is one visitor for every ten residents on island each day.

Visitor expenditures represent about 19% of the Gross County Product (GCP) for O'ahu. Total visitor expenditures grew 5.5% in 2005 over the previous year, with total expenditures reaching \$5.6 billion.¹¹

2. Visitor Accommodations

The inventory of hotel visitor units on O'ahu has steadily declined since 1996. More recently, from 2004 to 2005, accommodation units on O'ahu decreased 5.1%, accounting for a total visitor unit inventory of 34,167. This decrease was primarily due to a few older properties in Waikīkī being demolished to make room for new properties; however, the new properties will have approximately 600 fewer units than the properties they replace.¹²

More than any other island, O'ahu has a large percentage of hotel units compared with other types of accommodations:

- Hotel 81%
- Condo/hotel 11%
- Timeshare 4%

Visitor accommodations on O'ahu are concentrated primarily in Waikīkī, where there are 29,267 units, representing 86% of the total of all units on O'ahu. This concentration of visitors in a relatively small area provides Waikīkī with the critical mass needed to support the large number of restaurants, activities, and stores in the area.

The remaining 4,900 units are distributed across O'ahu as shown in Chart 4.

¹¹ DBEDT Island Highlights December 2005

¹² DBEDT Visitor Plant Inventory 2005, December

Chart 4: Visitor Units on O'ahu¹³



¹³ DBEDT Visitor Plant Inventory 2005, December

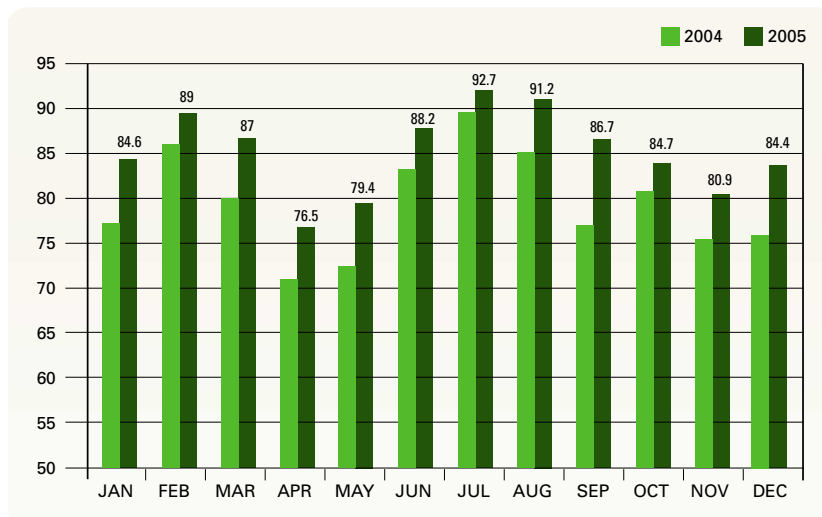
O'ahu has a mix of class of visitor units:¹⁵

- Luxury 6.3%
- Deluxe 37.4%
- Standard 45.0%
- Budget 11.3%

The majority of luxury and deluxe hotel accommodations are located in the areas of Waikīkī, Leeward O'ahu, and the North Shore, while the hotels in the airport area are primarily standard or budget accommodations.

In 2005, hotel occupancy rates exceeded 90% for peak months, with shoulder periods in April and May experiencing 75-80% occupancy rates. The average daily hotel room rate (ADR) in 2005 was \$139.¹⁶

Chart 5: O'ahu's Hotel Occupancy for 2004 and 2005¹⁷



There is a growing shift on O'ahu away from hotel rooms to condominiums, which will further pressure visitor accommodation availability. By 2010, it is estimated that there will be a net loss of 1,396 hotel rooms, offset by gains of 1,185 new timeshare units, and 1,169 new visitor condominiums.¹⁸ The greatest hotel room losses will occur in Waikīkī, with growth in hotel rooms occurring on the Leeward Coast. This trend will affect the mix of visitors attracted to O'ahu because timeshare and condominium visitors tend to be repeat visitors who visit fewer attractions and undertake fewer activities. Hotel visitors are more likely to be first-time visitors who participate in a greater number of activities. Likewise, the conventions, meetings, and incentive market for business events rely on hotel room availability to support these events.

¹⁵ DBEDT Visitor Plant Inventory 2005, December

¹⁶ DBEDT Monthly Visitor Statistics 2005, December

¹⁷ Smith Travel Research, Hospitality Advisors, LLC. 2005

¹⁸ HTA Analysis of Trends in Accommodations Supply, with Focus on Condominium and Timeshare Conversions, Hospitality Advisors, LLC. September 1, 2005

3. Critical Issues

Resident Concerns

Overall, O'ahu resident attitudes toward tourism have declined over the past three years. Between 2002 and 2005, the percent of residents who responded in a Survey of Resident Sentiments on Tourism that *tourism made their quality of life better* declined by 17 percentage points down to 52%. The percent of residents who strongly agreed that *“overall, tourism has brought more benefits than problems to the island”* decreased by 11 percentage points down to 42% during that same time period.²⁰

Tourism is perceived by residents to have a negative impact on significant issues that are directly affecting them. On O'ahu, 84% of residents consider the cost of housing to be a *big problem* and 51% believe that tourism has *made this issue worse*. Likewise, 77% of residents consider traffic on O'ahu to be a *big problem*, and 75% believe that tourism has *made traffic worse*.

Changing Neighborhoods

Another issue affecting residents in non-visitor neighborhoods is the growing presence of Bed & Breakfasts (B&Bs) and Individual Vacation Units (IVUs). Whether related to lack of hotel room availability due to high occupancy, or because visitors are seeking alternative experiences, there is a small but burgeoning increase in visitors staying in B&Bs and IVUs in residential neighborhoods. While the overall percent of visitors staying in these types of accommodations is small, their presence is becoming increasingly noticeable to residents living on the Windward side and the North Shore of O'ahu.

Legal B&Bs and IVUs are regulated by the city and restricted in number; however, residents are reporting a significant increase in illegal units in neighborhoods. In community meetings, residents voiced concern regarding B&Bs and IVUs generating increased traffic and noise into local neighborhoods and making it harder for people to find long-term, affordable housing. This appears to be a general concern – 50% of residents surveyed strongly agree that B&Bs and IVUs should be strictly controlled.²¹

Community meetings also identified the issue of communities losing their sense of identity and historical background. The Chinatown renovation is an example of a community that has worked together to revitalize their businesses and stimulate interest in the history of the area, attracting visitors, as well as residents. Communities around the island such as Kaimukī, Waipahū, Hale'iwa, and Waialua are also seeking this type of revitalization.

¹⁹ 2002 and 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

²⁰ 2002 and 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Workforce Concerns

Increased economic activity on O'ahu has resulted in an even tighter available workforce. On average in 2005, there were 445,125 civilian workers on O'ahu with an unemployment rate of 2.75%.²² With this unemployment rate, hotels and other businesses have found it increasingly difficult to attract the numbers and quality of staff required.

Overall, workforce availability on O'ahu has been impacted by a number of factors, including demographic changes. Like the rest of the state, the population on O'ahu is maturing, with baby boomers moving beyond prime workforce years, and fewer younger residents available to replace them. In addition, the high cost of living on O'ahu – with the median price of a single family dwelling in the first four months of 2006, selling at \$623,375, an increase of 6% from the median price in 2005 – makes it difficult to attract new residents to live and work on the island.²³

The visitor industry has even greater difficulty attracting workers due to the perceived reputation of the industry. The visitor industry is perceived as paying lower wages, as compared to other industries, and having fewer career opportunities. Only 14% of O'ahu residents strongly agreed that visitor industry jobs pay well in 2005.²⁴ Reported wages for visitor industry related jobs are equal to about 75 – 80% of the reported wages for all jobs on O'ahu.²⁵ In addition, when asked about working in the visitor industry, 30% of residents surveyed strongly agreed with the statement *"tourism jobs do not have much opportunity."*²⁶

The trends indicate that finding skilled employees on O'ahu is difficult, and attracting employees to work in the visitor industry is even more difficult, due to the perceived lack of opportunity and lower wages.

Hawaiian Culture and Natural Resources

A successful, sustainable tourism industry on O'ahu honors the indigenous Hawaiian culture, its people, their history and natural environment. Native Hawaiians and Hawaiian culture are what continue to make Hawai'i unique and different from other destinations around the world. In community meetings, there was a sense that Hawaiian culture is not being authentically perpetuated; people who are not properly trained are sharing cultural experiences with visitors and residents, and providing inaccurate information.

As Hawaiian culture is steeped in the natural resources of the island and ocean, both must be preserved and supported to retain this uniqueness and the health of the islands. The increase in visitors from cruise ships spending time onshore, overnight visitors, and the increase in overall residents affects the health of the environment. These increases result in greater traffic to popular beaches and visitor attractions such as Hanauma Bay. In response, Hanauma Bay has restricted car access to the park, and requires visitors to view a movie describing how best to experience what the bay offers while minimizing the negative consequences to the natural environment.

²² State of Hawai'i Department of Labor and Industrial Relations

²³ DBEDT Economic Data, 2006

²⁴ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

²⁵ State of Hawai'i Department of Labor and Industrial Relations

²⁶ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Aging infrastructure, increased usage and erosion have placed Waikīkī Beach at risk. Waikīkī Beach is the crown jewel of O'ahu and must always be welcoming to visitors and residents. When anything negatively affects this beach, it generates national coverage and severely influences visitor satisfaction and potential visitor perceptions of the state as a whole.

O'ahu residents report feeling the industry has adversely affected both Hawaiian culture and the island's natural resources. Results from the 2005 Survey of Resident Sentiments on Tourism indicate that 30% of O'ahu residents believe that tourism has worsened *the preservation of native Hawaiian culture*.²³ Even more dramatically, as tourism relates to the preservation of nature and open space, 46% of O'ahu residents believe the effect has been worse.

Visitor Satisfaction

Visitor satisfaction is a major issue for the island of O'ahu. In 2005, only 55% of visitors from the continental U.S. to the island rated their experience *excellent*.²⁷ In comparison to all the islands, O'ahu had the second lowest rating in the state. Feedback from the industry suggests that this lower rating is due to O'ahu being a more mature destination, with few new experiences for visitors, which is increasingly important given that more and more visitors to O'ahu are repeat visitors. Japanese visitors rated their visit to O'ahu with an "excellent" satisfaction level of 53%. This rating has been declining, likely due to a changing mix of Japanese visitors and related expectations. In the mid-90s Waikīkī provided Japanese women with high-end stores and merchandise they could not find at home. The exchange rate at that time made purchases relatively inexpensive. Since the mid-90s many of the Waikīkī retailers have established locations in Japan and the exchange rate has fluctuated.

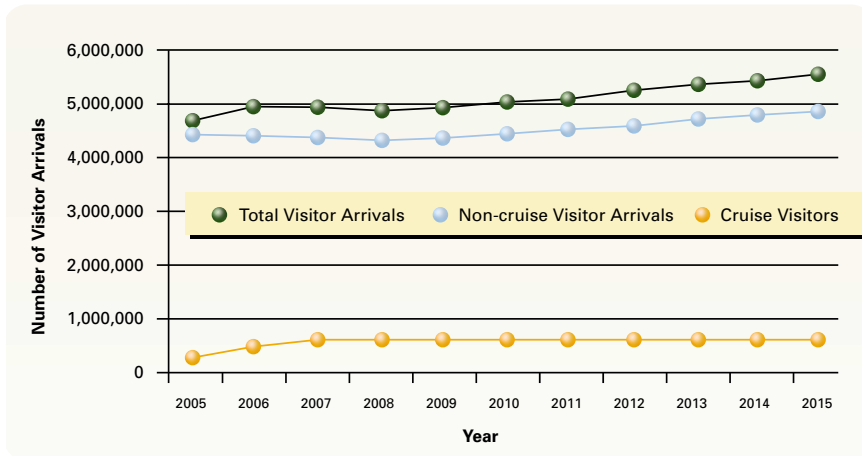
4. Forecast for O'ahu

Over the next five years, the number of visitors to O'ahu is expected to change primarily due to an increase in cruise visitors. Due to already planned cruise ships, cruise visitors to O'ahu will increase by 175,000 per year beginning in 2006, with an additional 50,000 in 2007. DBEDT projects an additional increase in non-cruise visitors at 2% per year beginning in 2010, assuming an increase in visitor accommodations.²⁹

²⁷ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

²⁸ DBEDT Visitor Satisfaction and Activity Report 2005

²⁹ DBEDT Long Term Forecast 2030

Chart 6: O'ahu Visitor Arrivals Forecast³⁰

Potential factors that may significantly affect the visitor industry on O'ahu include the number and type of available visitor accommodation units, the size and quality of the workforce, and resident support of the industry.

- As noted earlier, O'ahu actually had fewer visitor units in 2005 than in 2004. Few new visitor developments are being planned, with several conversions from hotel to either timeshares or condominiums.
- The unemployment rate on O'ahu continues to be below 3% in the first four months of 2006, suggesting a very tight labor market.
- Unless resident concerns are addressed, the visitor industry will continue to be perceived as making the quality of life on O'ahu worse rather than better. Negative resident sentiment will result in a negative visitor experience.

This plan begins to address the challenge of balancing the economic needs of O'ahu, with the needs of the visitor industry, visitors, residents, the natural environment, and Hawaiian culture. Successfully implemented, this plan will result in greater resident satisfaction, preservation of natural resources, perpetuation of Hawaiian culture, and greater visitor satisfaction with their on-island experience.

³⁰ SMS Forecast

IV. O'ahu Tourism Strategic Plan

A. Plan Assumptions

The following are underlying factors in the planning process that were agreed to in discussions of the O'ahu TSP Advisory Committee, and are shared to provide greater insight into the considerations underlying this plan.

- The quality of life for O'ahu residents is important for all stakeholders. The visitor industry, together with other stakeholders, is committed to contributing to an enhanced quality of life on O'ahu.
- The native Hawaiian culture is what makes O'ahu and the state unique for residents and visitors. This unique indigenous culture must be retained and perpetuated.
- O'ahu is home to many diverse cultures and neighborhoods. The celebration of these cultures, along with the Hawaiian culture, make O'ahu special.
- There is an opportunity to act now to ensure the future of O'ahu and the visitor industry. By managing growth in the visitor industry today in an integrated way, not only will our residents have a better quality of life, but our visitors will have a better experience. In doing so, the visitor industry will be able to remain attractive over time, and we will achieve the vision of this plan.
- The visitor industry is the single largest contributor to O'ahu's economy, accounting for a significant 19% of the county's gross income. Therefore, it needs to be supported. Like all industries, the visitor industry is cyclical. This plan and other tourism-related plans must be flexible and prepared to address the growth years as well as the slower years in visitor arrivals and spending.
- The type and expectations of the visitors traveling to O'ahu are changing; therefore, if the island is to remain attractive, products and services must adjust to respond to the changes. The growing desire among visitors to interact with the resident population will continue to be essential.
- The competition for visitors is increasing dramatically; therefore O'ahu must continually provide a product/service that is unequaled in the global market place and promote the range of multi-cultural activities and experiences that are unique to the island.
- Technology represents new opportunities to track the changing needs of consumers and how they receive information. This will result in changes in the delivery channels used to promote O'ahu to future visitors.
- Tracking the measures in the scorecard will guide future revisions to the plan.

B. Plan Structure

Vision

The vision for O'ahu tourism describes the ideal way tourism should interact with its stakeholders. This vision is what this O'ahu TSP is striving to achieve. The vision included in the O'ahu 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 O'ahu 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 O'ahu stakeholders 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, as well as building on relevant work already being done, or outlining 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 that it is most closely aligned with. 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 in this plan 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 expected to be adjusted regularly by individuals and/or a planning oversight committee, as necessary. Action plans identify recommended champions and supporting organizations to implement strategies and specific actions. Action plans will be available on the City and County of Honolulu website. More information on oversight functions is described in Objective 7 of this document.

Measurements

A performance scorecard, with high level current measures and directional targets for 2009, is 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 scorecards.

C. O'ahu Tourism Vision

Tourism on O'ahu will:

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

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

D. O'ahu Tourism Goal

To strategically manage tourism on O'ahu, in a sustainable manner, that promotes a good quality of life for residents, preservation of our natural and cultural resources, quality experiences for visitors and economic growth.

E. O'ahu Tourism Objectives, Strategies, and Measures

Objective 1: To increase the economic contribution of the visitor industry to O'ahu

Rationale: Because of the significance of the visitor industry to the economic well-being of the island, this plan focuses attention on maintaining the relative contribution of the visitor industry to the economy and ensuring an increasing annual dollar contribution.

This plan considers both the island's challenges and opportunities relating to tourism. Its challenges include strained infrastructure and residents' perception of the visitor industry workforce. Its opportunities include higher sustainable occupancy levels in accommodations during shoulder periods, as well as a diverse range of on-island activities.

Choices made are mindful of the capacity of existing resources, and are designed to protect what is critical to ensuring a positive visitor experience. The solution found in this plan is to emphasize increasing per-person per-day spending, and increasing hotel occupancy during shoulder periods.

Critical to achieving this objective is marketing to target markets that will enjoy and appreciate the unique characteristics of O'ahu, who will take advantage of the range of budget to luxury visitor accommodations and who will experience a number of activities. Next, the visitor experience must be rich with diverse on-island experiences, including activities that reflect the historical and cultural significance of individual communities. Infrastructure improvements and offering new visitor products and services, such as agri-tourism experiences are additional ways that the tourism product on O'ahu can be rejuvenated to provide a better visitor experience.

There must also be sufficient airport and harbor infrastructure to accommodate the growing demand for the greater number of visitor arrivals. In addition, arriving passengers at all sites should be greeted in a warm spirit that reflects O'ahu.

Current and future workforce development is also necessary to ensure that the economic contribution of the visitor industry remains high. Quality and capacity of the workforce are essential to ensuring high levels of visitor satisfaction. If the workforce is inadequate, in either skills or numbers, the quality of the visitor experience begins to decline. This plan anticipates continued challenges in recruiting qualified workers for the visitor industry, including workforce for inter-island cruise lines. The number of jobs required in the O'ahu visitor industry is expected to rise over the next few years at a pace faster than the projected population growth rate. These trends, together with a very low unemployment rate, and a resident perception of low wages in the visitor industry, necessitate aggressive workforce development programs.

Strategies to Achieve Objective 1 for 2006 to 2009:

- a. Target market segments that can provide the highest yield to the O'ahu visitor industry.

Major Action Steps

- i. Target first-time, infrequent, and experiential North American visitor segments by promoting the revitalization of Waikīkī.
 - ii. Target Japanese visitors and respond to the changing conditions of this market segment.
 - iii. Promote O'ahu as the desired location for first-time visitors from select emerging markets. Ensure that visitor industry stakeholders understand the expectations of this market segment and are able to meet their needs.
 - iv. Cross promote activities around the island to visitors staying in Waikīkī to provide diversity of experiences for visitors, as well as share the economic benefits of the industry island wide.
 - v. Advocate for tax incentives to encourage renovation of older accommodations.
 - vi. Coordinate segmentation marketing efforts and develop a coordinated marketing plan with the other county visitor bureaus, HTA, etc.
 - vii. Encourage Convention Marketing & Incentive sales staff to focus on the higher spending convention groups.
- b. Ensure that the visitor experience on O'ahu provides good value and matches or exceeds the expectations of target markets by making product improvements and by adding a variety of new products and services.

Major Action Steps

- i. Continue to upgrade and improve the infrastructure supporting natural resources, events, access, accommodations, and cultural offerings available to visitors throughout the island.
 - ii. Encourage the continuation and expansion of the HTA Greetings Programs at both airports and harbors, with increased support from the industry.
 - iii. Develop new products and services, in the events and sports categories, that meet the needs of potentially valuable segments who will travel in shoulder periods for specific purposes.
 - iv. Offer visitor experiences, such as tours on active farms and ranches, to highlight the benefit and attractiveness of local produce and meats.
- c. Support harbor improvements to accommodate current and future requirements, such as the SuperFerry, cruise ships, cargo ships, etc.

Major Action Steps

- i. Publicly support the need for harbor improvements.
- ii. Advocate for legislation to fund harbor improvements.

- d. Increase the available workforce by improving the perception among residents of the visitor industry as more than a low paying service industry through education, training, and outreach.

Major Action Steps

- i. Develop programs to attract more residents to attend programs in the TIM school at the University of Hawai'i, or other community colleges that offer hospitality-related courses.
- ii. Educate the resident population about the range of jobs available in the visitor industry and provide training opportunities.
- iii. Create outreach communications programs to encourage elementary to high school students to seriously consider working in the visitor industry.

Objective 1 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
1.1	Residents surveyed: give tax incentives for renovating existing hotels: ³¹	56% Agree	2004	Reverse Declining Trend
1.2	Total Arrivals: ³²	4,751,855	2005	Modest Increase
	Total Expenditures (in millions): ³³	\$5,679	2005	Increase*
1.3	Average per person per day expenditures: ³⁴	\$175	2005	Increase*
	Per-Party Per-Trip: Luxury Hotel: ³⁵	\$2,858	2005	Increase*
	Per-Party Per-Trip: Budget to Standard Hotel: ³⁶	\$2,303	2005	Increase*

*Inflation Adjusted

³¹ DBEDT Visitor Satisfaction and Activity Report 2004

³² DBEDT Monthly Visitor Statistics 2005, December

³³ DBEDT Monthly Visitor Statistics 2005, December

³⁴ DBEDT Monthly Visitor Statistics 2005, December

³⁵ SMS Segmentation Analysis 2005

³⁶ SMS Segmentation Analysis 2005

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

These include:

- Supporting increased business and employment opportunities for residents related to the visitor industry;
- Supporting the efforts of public and private entities to provide workforce housing;
- Supporting infrastructure improvements including those that help to reduce traffic;
- Encouraging communities to work together to recognize their unique sense of place and build upon community-based support to develop experiences to share that sense of place with residents, as well as visitors.

Rationale: O'ahu is a special place to live and visit. To remain that way, a balance is required – “healthy land, healthy people.” When a community is healthy, so are its residents and visitors who come to experience O'ahu. The attributes of O'ahu that its residents love – cultural and natural resources, access to parks and beaches, diverse activities – are also things that visitors appreciate about O'ahu.

As the industry is thriving, O'ahu residents applaud the economic benefits, but are not as enthusiastic about the impacts of growth, such as inadequate infrastructure to support this growth. Over the past several years, resident satisfaction with the visitor industry on O'ahu has declined somewhat.

The visitor industry is perceived as contributing to the higher price of housing over the past five years, making it more difficult to afford a home and increasing the number of homeless families. An added impact of homelessness is that a portion of these families are living at beaches, making these sites less welcoming and attractive to other residents and visitors.

The spread of illegal B&Bs and IVU rentals in non-visitor designated communities, such as the North Shore and Kailua, is changing the nature of these communities, leading to resident dissatisfaction.

Overall, the infrastructure of O'ahu has been extended beyond its capacity, and is inadequate to support current resident and visitor numbers. Areas requiring improvements include transportation options, major roads and highways, water and sewer, and facilities at beaches and parks.

There are seven strategies that begin to address some of the issues within the visitor industry that can help contribute to a better quality of life for O'ahu residents, and that contribute positively to the visitor industry.

The highest priority strategies relate to community improvements to create local economic opportunities that are attractive to both residents and visitors. These strategies include supporting local businesses as they develop, ensuring laws related to the legal operations of B&B and Individual Vacation Unit (IVU) rentals are enforced, and supporting improved ground transportation alternatives.

Strategies to Achieve Objective 2 for 2006 to 2009:

- a. Support and expand community-based revitalization and development of neighborhoods, such as Chinatown, by working with residents to retain and enhance the unique character and history of their neighborhoods, as well as provide new opportunities for residents to work and live in their community.

Major Action Step

- i. Encourage the construction and rehabilitation of buildings that will attract people to live and work in the revitalized areas.
 - ii. Encourage community-based activities by directing County Product Enrichment Program (CPEP) funds for O'ahu toward community-driven revitalization programs.
- b. Through the County Product Enrichment Program educate and provide awards to qualifying communities to support the development of events and activities that will enable them to support and benefit from the visitor industry.

Major Action Steps

- i. Review the county allocation process for determining its share of the County Product Enrichment Program dollars from HTA.
 - ii. Identify opportunities to support community-driven activities that will benefit the community and provide visitors with new experiences.
- c. Encourage the coordination, collaboration, and improvement in ground transportation services for both visitors and residents to minimize congestion and travel time.

Major Action Steps

- i. Advocate for mass transit to reduce the overall impact of traffic on the island, to help meet the arrival and departure needs of the visitors at the airport and harbors, and, to support the needs of the visitor industry employee base.
 - ii. Promote use of existing non-rental car transportation options – TheBus, the trolley, and activity-specific buses to high traffic visitor locations – by providing adequate information and making visitor bus passes for 1-3-5 days available for purchase at hotels upon registration, and through vacation wholesalers.
 - iii. Encourage visitor industry employers to subsidize/buy bus passes and organize Van Pool or car-pooling for employees with long commutes.
 - iv. Support other alternative transportation options including the proposed ferry and car-pooling.
 - v. Encourage options for resident workforce transportation by businesses in public, private, state, and local sectors.

- d. Consider programs to provide technical assistance to local businesses to promote local products to potential buyers in the visitor industry. Assistance to include the development of business and marketing plans to expand their businesses and help them grow.

Major Action Steps

- i. Provide expertise to agri-tourism providers on reaching visitors and identifying opportunities for growth.
 - ii. Develop technical assistance programs to provide business-related support for individuals and organizations to market to visitors and visitor-related companies. Identify arts and crafts organizations, companies, and individuals that will benefit from such assistance, thereby providing more experiences for visitors and more support for local small business.
 - iii. Support sporting events that include residents and attract visitors, particularly during shoulder periods.
 - iv. Create a small business guidebook available through the Web to assist the community to develop new products and services designed for the visitor industry.
- e. Enforce current regulations, and as necessary, advocate for additional regulations, related to Bed and Breakfasts and Individual Vacation Unit Rentals to ensure that communities remain great places to live.

Major Action Steps

- i. Encourage enforcement of regulations regarding visitor accommodations operating without a permit within residential communities. This is primarily a regional issue affecting the areas with a high concentration of these accommodations.
 - ii. Support evaluation of a process to require licensed operators to post their certificates for public view on their properties.
 - iii. Consider legislation requiring a licensed operator to identify their City-issued certificate number on any advertising both in-state and out-of-state including their business cards and Internet advertising.
 - iv. Support legislation that would require Individual Vacation Unit Rentals to provide information regarding their management office and contact information to their neighborhood boards, which in turn, will make them available to neighbors of those properties.
- f. Support government efforts to improve and maintain essential public infrastructure, such as roads, sewage, water, trash, waste, and potholes.

Major Action Steps

- i. Encourage industry leaders to support government efforts to improve and maintain essential infrastructure.

Objective 2 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
2.1	Residents surveyed who agree: ³⁷ - 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:	50% 71% 36% 40%	2005	Reverse Declining Trends
2.2	Residents surveyed: how good a job the county visitor industry is doing helping other local businesses profit from tourist dollars: ³⁸	51% Good	2005	Reverse Declining Trend
2.3	Residents surveyed: bed and breakfasts and transient vacation rentals should be strictly controlled: ³⁹	70% Agree	2005	Maintain

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

Rationale: One of the keys to a successful visitor industry on O'ahu is ensuring there is active, regular communication, and understanding between key stakeholder groups. Community meetings and personal interviews highlighted how similar the issues are among all stakeholders. They also highlighted how rarely stakeholders come together on an equal basis to better understand each other. This lack of communication and understanding creates unnecessary distance between stakeholders. Increasing communications between stakeholders will lead to a better understanding of each other, greater mutual respect, and ultimately a stronger community for O'ahu. Likewise, opportunities that encourage both residents and visitors to interact with each other on an equal basis reduce the sense of separateness and create a richer experience for all.

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

³⁸ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

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

Strategies to Achieve Objective 3 for 2006 to 2009:

- a. Work with the HTA to implement effective ongoing public education campaigns targeting residents, legislators, and funders regarding positive contributions made by the visitor industry.

Major Action Steps

- i. Encourage HTA to develop a public awareness program that communicates to *kama'āina* the contribution the visitor industry makes to the quality of life in the community and the opportunities it provides.
 - Assess the existing campaign and make adjustments as necessary to ensure the communication programs achieve the objectives.
 - ii. Communicate the value of events that include visitors and residents, such as the Visitor Industry Charity Walk, that puts visitor industry money directly into local non-profit organizations that benefit the community.
 - iii. Continue the multi-channel approach to consistently communicate key messages through public speakers, organizations and clubs, public relations and paid media.
- b. Identify and promote activities that appeal to visitors and residents.

Major Action Steps

- i. Support sporting activities that bring the local community and visitors together as spectators and participants.
 - Identify all sporting events that appeal to segments of residents and visitors (e.g. the Pro Bowl and the Honolulu Marathon, Sony Open), include them in the communications plan (see strategy 3.a.), and promote them in the context of visitor "value added."
 - Create new sporting events that will contribute to filling the shoulder periods when visitors place less strain on the resident community.
- ii. Encourage the already established festivals to become self-sufficient in order to increase capacity to support new festivals. Continue to promote festivals to residents and visitors.
- iii. Culture and the Arts represent one of the best ways for visitors and residents to interact for mutual benefit. There is a wealth of creative talent on O'ahu and a great willingness among artists to market their skills and products to the visitors.
 - Continue to identify cultural and arts events and promote them to the visitor market. Identify and create locations where culture and the arts can bring products and services to visitors to better enable such interactions.
- iv. Recognizing that parking and congestion can be a problem, especially where residents and visitors compete for the same limited space, ensure that travel options (such as public transportation and park and ride), as well as signage are clearly communicated to direct visitors to approved parking locations.
 - Ensure that organizers of events consider parking solutions and various travel options when creating and communicating their events.

- c. Improve resident and visitor industry relations by encouraging visitor properties to create a welcoming environment for residents.

Major Action Steps

- i. Encourage hotels, restaurants, and other visitor industry organizations to continue to offer and communicate special kama'āina packages of preferred pricing to O'ahu and neighbor island residents.
- ii. Encourage visitor industry stakeholders to welcome island residents "as a visitor."

Objective 3 Scorecard

	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: ⁴⁰	58% Good	2005	Reverse Declining 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: ⁴¹	63% Good	2005	Continue to Improve
3.3	Residents surveyed: how tourism affects your county on the overall quality of life: ⁴²	52% Better 18% Worse	2005	Reverse Negative Trend
3.4	Percent of enrollment who are residents attending UH-TIM statewide (includes residents with green cards): ⁴³	60%	2005/ 2006	Increase

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

⁴² 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴³ School of Travel Industry Management Student Services Office: 2005/2006 Enrollment

Objective 4: To maintain and improve visitor satisfaction with their experience on O'ahu.

Rationale: High levels of visitor satisfaction are essential for a successful visitor industry. O'ahu has achieved a relatively lower level of visitor satisfaction compared with other counties, and will strive to improve its visitor experience. Key to ensuring that visitors are highly satisfied is ensuring a good match between their expectations and O'ahu attributes. This begins with appropriate marketing to visitor markets. It also includes providing visitors with appropriate information about the island and its culture before arrival.

Visitor safety is a top priority for the visitor industry. Visitors need to be aware of the power of the ocean, of nature and how to respond to emergencies when they arise.

Strategies to Achieve Objective 4 from 2006 to 2009:

- a. Provide appropriate levels of service to meet visitor expectations.

Major Action Steps

- i. Continually evaluate the needs and expectations of visitors and train employees to meet those needs.
 - ii. In anticipation of successfully attracting visitors from new emerging Asian markets, develop partnerships with foreign visitor travel industry constituents to educate them about American customs in general and Hawai'i customs in particular. This will reduce resident and visitor conflict.
 - iii. Develop a certification program that recognizes visitor industry service level achievements emphasizing Hawaiian culture and history.
 - iv. Encourage visitor industry companies to develop and support programs that reward employees for superior customer service.
 - v. Encourage companies to participate in this certification program with employees who have "authentic" knowledge, by promoting them as part of the "real Hawai'i" story.
 - vi. Support the implementation of a signage plan to assist visitors finding their way around the island.
- b. Make Honolulu International Airport welcoming to all passengers, residents and visitors, and reflect a Hawai'i sense of place.

Major Action Steps

- i. In concert with organizations operating within the airport, develop a program that will provide measurable continuing improvements in the environment, services, and level of service offered to visitors and residents arriving at and departing from O'ahu.
- ii. The O'ahu Visitors Bureau to seek a seat on the committee that is currently implementing the Airport Modernization Plan to ensure a "voice of the visitor" is included in the plan.

- iii. View the arrival experience from a first-time visitor perspective and design welcoming images – from cleanliness and signage, to the people, the clothing, flowers and foliage – that reflect very highly on the experience visitors can expect for their vacation. Consider surveying travel agents who sell packages to Hawai'i regarding their clients' expectations for first-time visitors.
 - iv. Use all places of arrival to educate our visitors with information that will help them to have a more successful vacation (see section 4.e.).
 - In-flight video talking about the beauty of Hawai'i and important messages regarding what the Wiki Wiki bus is, beach safety, local etiquette, respect for the 'āina (land) and more.
 - Upon landing/arriving, additional videos to clearly show where to go for baggage claim, the Wiki Wiki bus, etc.
 - At the baggage claim waiting area, continue to provide information that is useful and educational for travel on O'ahu.
 - v. Improve the reliability, appearance, and timeliness of the Wiki Wiki buses.
 - vi. Reduce wait time for customs agents by improving staffing and providing superior training to minimize the impact of delays.
- c. Make piers welcoming to all passengers, residents and visitors, and reflect O'ahu's sense of place.

Major Action Steps

- i. Develop a set of rules for the piers similar to Department of Transportation (DOT) rules for the airport that will establish protocols for organizations permitted to do business at the point of embarkation and disembarkation.
 - ii. In concert with those organizations operating within the piers, develop a program that will provide measurable continuous improvement in the environment, services and level of service provided at these locations.
 - iii. Where possible, build on the HTA Greetings Program to orient new arrivals to the "taste and smell" of O'ahu by providing maps of interesting areas within walking/taxi distance of the pier. Provide businesses operating in the area with information regarding cruise arrivals, numbers of people, and length of stay.
 - iv. Provide support for organizations seeking to do business at pier locations that promote a positive first impression of O'ahu.
- d. Encourage first time visitors to visit O'ahu by providing and promoting upgraded Waikīkī experiences and by increasing promotional efforts for island-wide activities only O'ahu can offer (see 3.b.).

Major Action Steps

- i. Reinforce the scope of activities and new experiences that are conveniently available only on the island of O'ahu. Focusing on those that contribute to the economy, these will include, but are not limited to: rural and urban O'ahu, ocean and beaches, historical sites, museums, entertainment, and culture.

- e. Improve safety for residents and visitors in high crime and other unsafe areas.

Major Action Steps

- i. Support the Honolulu Police Chief in his efforts to increase his budget for new positions, most of which will be assigned to foot patrol around the island. If approved, this increase in the physical presence of law enforcement officers will play an important role in improving safety and security for residents and visitors.
- Increase police presence during those times and in places frequented by residents and visitors with higher crime rates, with special attention to areas where there is a particular imbalance in daytime populations (post events/service follow-up).
 - As a deterrent and to catch car thieves, cameras have been placed at the Pali lookout and 'Ehukai parking lots, with the monitors manned by local volunteers. Recommend that this camera program be considered and expanded for other high-risk areas.
 - Request the Department of Parks and Recreation increase the lead time for obtaining permits to hold surf meets and other ocean activities from 2 weeks to 6 months. This will permit organizers to get more sponsorship money, which in turn will help pay for additional policemen to patrol the beach and parking areas, and to assist with traffic management.
- ii. Strengthen the link between the Honolulu Police Department (HPD) and the visitor assistance program, Visitor Aloha Society of Hawai'i (VASH).
- iii. Consider supporting a process to strengthen the court's ability to prosecute suspects who have committed crimes against visitors by accepting video links to connect the court to the victims, thus eliminating the need for them to return to Hawai'i.
- f. Advocate for and support the education of visitors before or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources.

Major Action Steps

- i. Join the other counties to encourage the HTA to develop an educational tool to educate visitors prior to or upon arrival.
- g. Complete disaster recovery plans for O'ahu, particularly for Waikīkī.

Objective 4 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
4.1	Visitor Activity Participation – Continental U.S.: ⁴⁴ - Sightseeing - Recreation - Entertainment - Shopping - Culture - Transportation Visitor Activity Participation – Japanese: - Sightseeing - Recreation - Entertainment - Shopping - Culture - Transportation	82% 79% 70% 90% 72% 83% 89% 80% 88% 99.5% 50% 93%	2005 2005	Increase overall number of activities in which visitors participate
4.2	Visitor Satisfaction – Continental U.S.: ⁴⁵ - Excellent - Above Average - Below Average - Poor Visitor Satisfaction – Japanese: - Excellent - Above Average - Below Average - Poor	55% 38% 6% 0.8% 54% 43% 3% 0.3%	2005 2005	Increase % of visitors rating experience as excellent
4.3	Number of crimes against visitors in Waikīkī: ⁴⁶	1,484	2005	Reduce

⁴⁴ DBEDT Visitor Satisfaction and Activity Report 2005

⁴⁵ DBEDT Visitor Satisfaction and Activity Report 2005

⁴⁶ Honolulu Police Department's Waikīkī District 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: What distinguishes the State of Hawai'i and O'ahu from other places in the world is our indigenous Hawaiian culture. This culture and the incomparable aloha spirit are what make Hawai'i unique from any other sand, surf and sea destination in the world. To ensure the culture's perpetuation and accurate portrayal, efforts to increase resident and visitor understanding of the culture is critical.

Efforts to ensure understanding and appreciation need to begin early with our youth. In addition to working with youth, there is a need to develop programs so that learners of all ages can gain greater knowledge. With knowledge and awareness comes respect. With respect, appreciation and preservation will follow. This collective understanding can build a strong foundation to ensure that the Hawaiian culture is perpetuated, and that O'ahu residents' quality of life and the visitors' experiences are enriched by a vibrant Hawaiian culture.

The visitor industry can support these efforts by offering culturally relevant programs, and ensuring visitors and employees are well informed to understand appropriate protocols at sites that have cultural and/or historical significance.

Strategies to Achieve Objective 5 from 2006 to 2009:

- a. Develop a process to define "authentic" Hawaiian culture in the visitor industry.
- b. Identify and support initiatives in the industry to develop programs that encourage Hawaiian values and cultural knowledge to be passed to future generations through hiring practices and training that includes Hawaiian values.

Major Action Steps

- i. Encourage visitor industry companies to retain cultural advisors and provide appropriate cultural training that includes Hawaiian values.
- ii. Support the development of a Hawaiian arts and culture database to link resources with the industry.
- iii. Develop a program to communicate proper Hawaiian spelling and pronunciation for visitors (to help them find their way around) and people who interact with visitors and other residents as appropriate. Request cooperation of local TV news reporters, anchors, and local news reporters to correctly pronounce Hawaiian words.
- iv. Implement service and Hawaiian values training in the workplace.
- v. Encourage Hawaiian community-based activities and involve the visitor industry where appropriate.

Objective 5 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
5.1	Residents surveyed: how tourism affects your county regarding the preservation of native Hawaiian culture: ⁴⁷	30% Poorly	2005	Reverse Declining Trend
5.2	Visitor Cultural Activity Participation - Continental U.S.: ⁴⁸ - Culture (Overall) - Historic Site - Museum/Art Gallery - Polynesian show/Lū'au - Art/Craft Fair - Festival Visitor Cultural Activity Participation - Japanese: - Culture (Overall) - Historic Site - Museum/Art Gallery - Polynesian show/Lū'au - Art/Craft Fair - Festival	75% 60% 23% 42% 9% 7% 52% 24% 17% 25% 2% 7%	2005 2005	Increase percentage of visitors who participate in activities
5.3	Residents surveyed: how good a job the county visitor industry is doing in treating native Hawaiian culture in an accurate and respectful way: ⁴⁹	25% Poorly	2005	Reverse Declining Trend

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

⁴⁸ DBEDT Visitor Satisfaction and Activity Report 2004

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

Objective 6: To support the enhancement and maintenance of the natural resources of O'ahu.

Rationale: Thriving natural resources are an essential part of the quality of life for O'ahu residents, as well as for a quality visitor experience on O'ahu. It is critical that these resources are maintained and protected, even with the increasing number of residents and visitors. In an urban environment, having quality open spaces available for retreats is especially important.

To ensure that the natural resources of O'ahu are protected, this plan calls for identifying priority natural resources on the island, ensuring appropriate access, infrastructure, and supporting creative ways to maintain those resources.

This plan also recognizes that infrastructure that is not maintained or inadequate to meet current needs, may end up damaging the natural environment. The infrastructure must be improved and maintained.

Strategies to achieve Objective 6 from 2006 to 2009:

- a. Support the enhancement and improvement of O'ahu parks and beaches. As a starting point, build on the process begun by the Hawai'i Tourism Authority and the inventory process currently underway by the State Office of Planning.

Major Action Steps

- i. Encourage the identification, maintenance, and protection of our natural resources.
- b. Encourage retention and expansion of open spaces and agricultural lands.
- c. Support infrastructure improvements, particularly in areas with a high concentration of residents and visitors, such as Waikīkī.
- d. Support the protection of the natural qualities and enhancements of all beaches, and in particular, world famous Waikīkī Beach.

Objective 6 Scorecard

	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: ⁵⁰	6% Poorly	2005	Reverse Declining Trend
6.2	Residents surveyed: how good a job the county visitor industry is doing conserving natural resources: ⁵¹	30% Good	2005	Reverse Declining Trend
6.3	Residents surveyed: possible community problems in the number & quality of parks: ⁵²	50% Problem	2005	Reverse Declining Trend

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

Rationale: For a plan to be successful, it must be implemented in a timely fashion, tracked for progress against a scorecard, and adjusted as appropriate. This O'ahu TSP requires significant oversight due to its complexity and scope. An approach that has been successful is to utilize a third party to oversee and track the implementation process. This third party will be responsible for coordinating meetings of an advisory committee. Together, the advisory committee will guide implementation, monitor progress, make any necessary adjustments, and ensure alignment of this plan with other county, regional, or state plans.

The scorecards associated with each objective will assist the oversight body to assess progress over time, and may be revised and expanded as needed. No one organization or group has responsibility for the entirety of this plan. Therefore, it is necessary to have a dedicated oversight body to ensure momentum, and to manage the diverse constituents required to contribute to the success of the plan.

⁵⁰ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁵¹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁵² 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 from 2006 to 2009:

- a. The City and County of Honolulu will oversee implementation and tracking of the O'ahu TSP with support from the O'ahu Visitors Bureau (OVB), Hawai'i Hotel and Lodging Association (HHLA), Waikīkī Improvement Association WIA), Waikīkī Business Improvement District (WBID), the Hawai'i Visitors and Convention Bureau (HVCB), Hawai'i Tourism Authority (HTA) and others.

Major Action Steps

- i. Provide a transition process for the first year of plan implementation to develop the structure for ongoing plan follow up. This organization may be a third party retained for this task.
- ii. Develop an information and data gathering process to track the progress of the plan. Conduct meetings periodically relative to when "report cards" are ready.
- iii. Clearly identify which organizations on O'ahu advocate and represent the "voice of the visitor."
- b. Promote the plan to create public awareness and support.
- c. Encourage the gathering of county-level measures to adequately track the progress of this plan.

Objective 7 Scorecard

	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.

V. Appendices

A. Acknowledgments

Mahalo to all those involved in developing the O'ahu 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.

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Jeanne Schultz, Director - Mayor's Office of Economic Development

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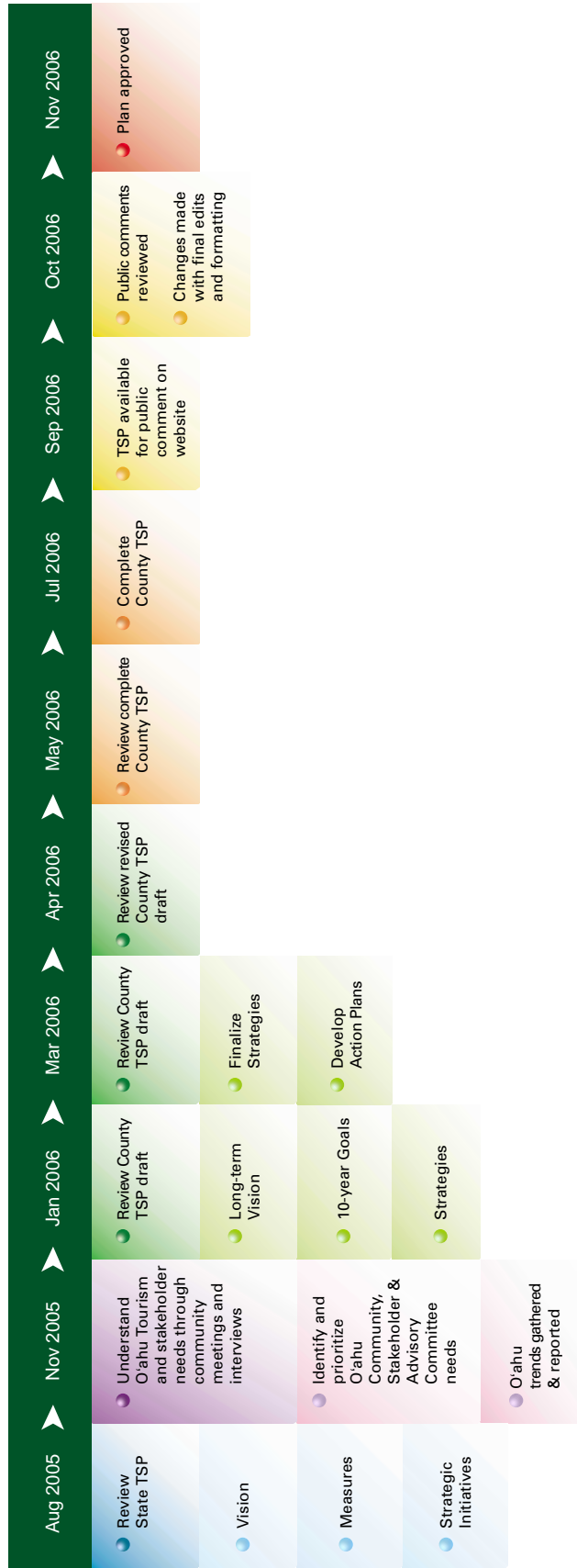
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B: O'ahu Tourism Strategic Plan Timeline and Key Events



C: O'ahu 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 for the island, including airports, harbors, roads, public parks, national parks, beaches; workforce development through O'ahu Community College, University of Hawai'i; and tourism through Hawai'i Tourism Authority and O'ahu Visitors Bureau.

The county, state, and federal governments contribute to all aspects of the vision, they include insuring a vital and sustainable economy, and 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 exists for better plan implementation.

a. Overall Priorities

- i. Sustain economic growth recognizing that 17% of O'ahu economy is tourism based.
- ii. Maintain or increase resident satisfaction with their quality of life on O'ahu.
- iii. Ongoing care of natural resources, including ocean resources.
- iv. Upkeep of sacred and historic sites and 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.
- vii. Waikīkī split between county and state – we need better coordination to make the changes required.
- viii. Insufficient parking in Waikīkī for visitors and locals.
- ix. Increased safety for visitors and residents.

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. Enforce current regulations to maintain the quality of neighborhoods.

- iii. Legislation regarding liability issues of visitors and residents trespassing on public/private lands.
- iv. A method to identify "approved" guidebooks, websites, attractions, tour companies, etc. for accurate information being 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 O'ahu recognizing the different needs of business vs. leisure; continental U.S. vs. Japanese vs. international.
- vi. Emergency safety plan for visitors.
- vii. Allow permits for surf meets to be issued a year in advance to allow for better planning and attracting of sponsors.
- viii. Replant Diamond Head with native plants.

c. Infrastructure Needs

- i. Waikīkī infrastructure improvements required.
- ii. Waikīkī Beach preservation.
- iii. Traffic and pedestrian safety issues in Waikīkī.
- iv. Funding to improve the harbors to support the SuperFerry and the cruise ships.
- v. Funding to improve airport infrastructure.
- vi. Consider adding another airport.
- vii. Funding to improve facilities at public facilities, parks and beaches.
- viii. Funding for improvements and maintenance of trails.
- ix. Funding to improve road signage, as well as airport signage.
- x. Funding for visitor safety in case of disasters.
- xi. Legislation/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 need of visitors. This is inclusive of the visitor associations, not-for-profit sector, retailers, tour operators, transportation, as well as accommodations.

a. Workforce Needs

Currently the unemployment rate on O'ahu 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 recognize and reward employees who provide higher levels of service and share authentic cultural information.
- x. More interaction between UH-TIM, Kapiolani Community College, and high school programs.
- xi. Cultural education to be able to answer visitor questions and to better understand the value of the host culture.
- xii. Expand the level of professional jobs within the visitor industry available to local people.

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 O'ahu 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 O'ahu in order to attract visitors.
- ix. Appropriate targeting of visitors to O'ahu:
 - 1. Accommodations on island better suited toward the middle-market vs. luxury
 - 2. Meeting rooms for business-related travel
 - 3. Spa market, wellness market
 - 4. Aging Visitors
 - 5. Japanese, International
 - 6. Target long-term, high spending visitors
- x. Better utilization of the Convention Center.
- xi. Plan to market O'ahu and Waikīkī both.
- xii. Does Waikīkī/O'ahu have the visitor accommodations to attract high-end spenders?

c. Large Business Needs

- i. Collection of TAT (Transient Accommodations Tax) for all types of accommodations.
- 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.
- 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, non-profits, Hawaiian cultural practitioners, etc. to work together to maximize efficiencies and improve contact with visitors.
- vi. Hawaiian artists want to participate in the visitor industry and be represented authentically.

e. Communities other than Waikīkī

- i. Maintain the more rural qualities that the residents want and are interesting to visitors, without the communities becoming overwhelmed with traffic and outsiders.
- ii. On the North Shore there is a need to manage traffic flows in the winter with cars exceeding residents multiple times.
- iii. Increased police where visitors congregate, such as the North Shore.

f. Cruise Needs

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

g. Visitor Attractions

- i. The number of visitors at any one time should not exceed a capacity level that is manageable and provides 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.

3. Visitors

These represent all visitors to O'ahu.

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. O'ahu residents that are welcoming and friendly – 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.
- ix. Reasonable price to reach O'ahu. Keep airfares as low as possible.
- x. Polite customs officials at airports.
- xi. Rental car agencies to provide more information on best times to travel (or not to travel).
- xii. Promote culinary attractions of O'ahu.
- xiii. Need more high-end accommodations to attract higher end spenders.

b. First Time Visitor Needs

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

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 & wellness
 3. Agri-tourism
 4. Eco-tourism

d. Cruise Visitor Needs

- i. Visit the highlights of O'ahu within a day.
 - 1. Convenient transportation on island
 - 2. Historic sites are not overly crowded
 - 3. Sufficient restroom facilities – number and quality
 - 4. Authentic experiences – where are they? How to access them?

4. Residents

a. Overall Needs

- i. Desire to maintain a high quality of life. Fear that visitor industry growth is/will destroy this.
- ii. Respect from the visitor industry; residents feel disenfranchised from the success of the visitor industry. Lack of communication on how the visitor industry benefits them. How does the industry give to the community?
- iii. Respect from visitors – visitors need to be educated prior to arriving on island. Movies, guidebooks, etc. that provide protocol and insights into the “local style” and appropriate respect for cultural and historic sites.
- iv. Two-way communications with the industry and government.
- v. Outlet for frustration – a positive communications process must be put in place for government to “hear” residents.
- vi. Maintain quality of life especially in non-metropolitan communities. How to balance the needs of residents, businesses within the community, and visitors wanting a residential experience?
- vii. Respect and recognition of all the cultural experiences of O'ahu.
- viii. Provide and maintain quality parks, natural environment and facilities for hiking, going to the beach, and picnicking. Private places to remain private.
- ix. Clean, well-maintained, and easily accessible restroom facilities around the island including parks and beaches. Prevent vandalism.
- x. Enforce the established park rules.
- xi. Feel safe in their own communities.
- xii. Eliminate laws against growing and using marijuana.
- xiii. 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 *kūpuna* and inspiring young people to continue native Hawaiian practices.
- v. Improved recycling.
- vi. Develop brochures on loss of Nationhood to be given to every visitor.

- c. Smaller rural communities on O'ahu (North Shore, Kailua, etc.)
 - i. Need to manage traffic due to surf viewing, meets, etc. (both from non-area residents, as well as visitors).
 - ii. Maintain or decrease percent of IVUs, so that locals don't feel like strangers in their own communities.
 - iii. Visitor centers in smaller communities.
- d. 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.
- e. 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 O'ahu

- Plan for the future by identifying emerging markets for O'ahu and developing plans to attract these markets.
- Provide incentives and training for older established business owners to remain competitive over time. Focusing on those family businesses that reflect the sense of place of local communities.
- Carefully plan for new visitor accommodations in visitor designated areas.

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

- Implement service and Hawaiian values and training in the workplace – serve vs. servant:
 - Develop a certification program that acknowledges greater knowledge in service emphasizing Hawaiian culture and history.
 - Provide a way for employees to earn a higher salary, therefore providing a better experience for visitors.
 - Promote companies that have certified employees because they have “authentic” knowledge.
- Regulate the number of visitor accommodations that can operate within residential communities.
- Support City and County efforts to clean up communities by eliminating abandoned cars and other trash.
- Improve safety for residents, especially in those communities that have large increases in daytime populations. Such as the North Shore during seasons with high waves, traffic/road safety, additional shelters, adequate emergency facilities.
- Encourage visitor industry paid internships for college students.
- Increase the number of scholarships offered in the UH-TIM School, including encouraging visitor industry paid internships.

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

Objective 4: To maintain and improve visitor satisfaction with their experience on O'ahu.

- Sense of value for cost compared to other destinations.
- Improve the traffic access experience between the airport and Waikīkī:
 - Consider a dedicated road.
 - Improve the visual aspects of Nimitz Highway.
- Better coordination between the state and the City & County to improve visitor satisfaction with their stay in Waikīkī. For example, visitor kiosks for information in communities, and digital/TV information resources.

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

- Support a process to provide and certify employee/business knowledge of Hawaiian culture and history.
 - Classes could include visiting parks, museums, and sacred sites – those that can be accessible to visitors and those that should be kept private and the related rationale.
 - Encourage employers to provide merit-based incentives to employees to achieve levels of certification (knowledge to transfer, incentives, and certification programs).
- Encourage and support the development of new authentic Hawaiian experiences by assisting Hawaiians to create new products.

Objective 6: To support the enhancement and maintenance of the natural resources of O'ahu.

- Identify, maintain, and protect our natural resources; specifically, watersheds and reefs. Ensure legislation, work with neighborhood boards and other groups to identify and protect, recognize carrying capacity.
- Monitor and control eco-tourism.

E: O'ahu 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 O'ahu TSP complements the State Plan, the strategies included in this plan are cross-referenced by State Initiatives.

Access

- Support harbor improvements to accommodate current and future requirements, such as the SuperFerry, cruise ships, cargo ships, etc. (Objective 1.c.)
- Make Honolulu International Airport welcoming to all passengers, residents and visitors, and reflect a Hawai'i sense of place. (Objective 4.b.)
- Make piers welcoming to all passengers, residents and visitors, and reflect the O'ahu's sense of place. (Objective 4.c.)

Communications and Outreach

- Support and expand community-based revitalization and development of neighborhoods, such as Chinatown, by working with residents to retain and enhance the unique character and history of their neighborhoods, as well as provide new opportunities for residents to work and live in their community. (Objective 2.a.)
- Through the County Product Enrichment Program educate and provide awards to qualifying communities to support the development of events and activities that will enable them to support and benefit from the visitor industry. (Objective 2.b.)
- Encourage the coordination, collaboration, and improvement in ground transportation services for both visitors and residents to minimize congestion and travel time. (Objective 2.c.)
- Consider programs to provide technical assistance to local businesses to promote local products to potential buyers in the visitor industry. Assistance to include the development of business and marketing plans to expand their businesses and help them grow. (Objective 2.d.)
- Support government efforts to improve and maintain essential public infrastructure, such as roads, sewage, water, trash, waste, and potholes. (Objective 2.f.)
- Work with HTA to implement effective ongoing public education campaigns targeting residents, legislators, and funders regarding positive contributions made by the visitor industry. (Objective 3.a.)
- Identify and promote activities that appeal to visitors and residents. (Objective 3.b.)
- Improve resident and visitor industry relations by encouraging visitor properties to create a welcoming environment for residents. (Objective 3.c.)
- Advocate for and support the education of visitors before or upon arrival on basic information that will enhance their safety, enjoyment, and understanding of local and Hawaiian culture and natural resources. (Objective 4.f.)

Hawaiian Culture

- Develop a process to define “authentic” Hawaiian culture in the visitor industry. (Objective 5.a.)
- Identify and support initiatives in the industry to develop programs that encourage Hawaiian values and cultural knowledge to be passed to future generations through hiring practices and training that includes Hawaiian values. (Objective 5.b.)

Marketing

- Target market segments that can provide the highest yield to the O'ahu visitor industry. (Objective 1.a.)
- Encourage first-time visitors to visit to O'ahu by providing and promoting upgraded Waikīkī experiences and by increasing promotional efforts for island-wide activities only O'ahu can offer (see 3.b.). (Objective 4.d.)

Natural Resources

- Support the enhancement and improvement of O'ahu parks and beaches. As a starting point, build on the process begun by the Hawai'i Tourism Authority and the inventory process currently underway by the State Office of Planning. (Objective 6.a.)
- Encourage retention and expansion of open spaces and agricultural lands. (Objective 6.b.)
- Support infrastructure improvements, particularly in areas with a high concentration of residents and visitors, such as Waikīkī. (Objective 6.c.)
- Support the protection of the natural qualities and enhancements of all beaches and in particular, world famous Waikīkī Beach. (Objective 6.d.)

Research and Planning

- The City and County of Honolulu to oversee implementation and tracking of the O'ahu TSP with support from OVB, HHLA, WIA, WBID, HVCB and HTA. (Objective 7.a.)
- Promote the plan to create public awareness and support. (Objective 7.b.)
- Encourage the gathering of county-level measures to adequately track the progress of this plan. (Objective 7.c.)

Safety and Security

- Improve safety for residents and visitors in high crime and other unsafe areas. (Objective 4.e.)
- Complete disaster recovery plans for O'ahu, particularly for Waikīkī. (Objective 4.g.)

Tourism Product Development

- Ensure that the visitor experience on O'ahu provides good value and matches or exceeds the expectations of target markets by making product improvements and by adding a variety of new products and services. (Objective 1.b.)
- Enforce current regulations, and as necessary, advocate for additional regulations, related to Bed and Breakfasts and Individual Vacation Unit Rentals to ensure that communities remain great places to live. (Objective 2.e.)
- Identify and promote activities that appeal to visitors and residents. (Objective 3.b.)
- Provide appropriate levels of service to meet visitor expectations. (Objective 4.a.)

Workforce Development

- Support harbor improvements to accommodate current and future requirements, such as the SuperFerry, cruise ships, cargo ships, etc. (Objective 1.c.)
- Increase the available workforce by improving the perception among residents of the visitor industry as more than a low paying service industry through education, training, and outreach. (Objective 1.d.)
- Identify and support initiatives in the industry to develop programs that encourage Hawaiian values and cultural knowledge to be passed to future generations through hiring practices and training that includes Hawaiian values. (Objective 5.b.)

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 on the state.

H: Listing of Agencies

City & County of Honolulu

City Council	Lawmaking body of the City and County of Honolulu, determines policies and programs for the city, including the review, amendment, and passage of an annual operating and capital improvements budget.
DPP	Department of Planning and Permitting is, responsible for the city long-range planning and community planning efforts and for the administration and enforcement of ordinances and regulations governing the development and use of land, codes pertaining to the construction of buildings, and city standards and regulations pertaining to infrastructure requirements.
DPR	Department of Parks and Recreation manages, maintains, and operates all parks and recreation facilities of the city (except those managed by the Department of Enterprise Services); develops and implements programs for cultural and recreational activities; and beautifies public streets.
DTS	Department of Transportation Services is responsible for planning, designing, operating, and maintaining transportation systems to meet public needs.
HESD	Honolulu Emergency Services Department is responsible for providing efficient, effective and economical operation of the pre-hospital emergency medical care and emergency ambulance service on O'ahu, and for providing ocean safety and lifeguard services.
HPD	Honolulu Police Department is responsible for the preservation of the public peace; protection of the rights of persons and property; prevention of crime; detection and arrest of offenders against the law; and enforcement and prevention of violations of state laws and city ordinances.
Mayor	Chief executive officer of the City and County government, performs numerous duties such as exercising direct supervision over agencies and enforcing provisions of the Charter, ordinances, and all applicable laws, and coordinating the drafting of the operating and capital improvements budget.
MOCA	Mayor's Office of Culture and the Arts assists the city in the preservation of the artistic and cultural heritages of all people residing in Honolulu.
NB	Neighborhood Board provides a mechanism to increase and assure resident participation in the process of government decision-making.
OCDA	O'ahu Civil Defense Agency develops, prepares for, and under disaster or emergency situations, assists in the implementation of civil defense plans and programs to protect and promote the public health, safety, and welfare of the people of the city.
OED	Office of Economic Development operates through four business units the Business Advocacy Program, the Office of Waikīkī Development, the Honolulu Film Office and the OED's Community based Economic Development Operations. Each unit contributes to the overall goals of attracting, retaining, nurturing, and advocating for businesses and business interests in Honolulu.
OMPO	O'ahu Metropolitan Planning Organization, responsible for coordinating the comprehensive, continuing, and cooperative transportation planning process for the island of O'ahu.
OVB	O'ahu Visitors Bureau promotes the interests of O'ahu 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 O'ahu.
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.

SMS Hawai'i	SMS Hawai'i is a research and consulting firm that specializes in evaluation, socio-economic research and analysis and feasibility studies. SMS has expertise in identifying and understanding local, regional, statewide and national issues, as well as assessing socio-cultural impacts, raising community awareness, and understanding community issues through focus groups.
WIA	The Waikiki Improvement Association is a private, nonprofit organization dedicated to making Waikiki a great place to invest, work, live and play. As the leading advocate for Waikiki, they partner with businesses and government to identify needs, develop strategies, shape public policy and implement programs to strengthen the physical and economic vitality of Waikiki and its role in the state's economy.

Hawai'i State & Other Agencies

A3H	Lawmaking body of the City and County of Honolulu determines policies and programs for the city, including the review, amendment, and passage of an annual operating and capital improvements budget.
COC	Chamber of Commerce works on behalf of members and the entire business community to improve the state's economic climate and help businesses thrive.
DBEDT	Department of Business, Economic Development and Tourism works to diversify the economy, expand existing business, and attract new economic activity.
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.
DOA	Department of Agriculture promotes the conservation, development, and utilization of agricultural resources in the state. Provides agricultural inspections for all incoming (to the state) flights.
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.
Governor	Chief Executive of the state, responsible for the execution of the laws of the state and for the effective performance of the executive branch of state government.
HCDA	Hawai'i Community Development Authority works with private enterprise and various federal, state, and county agencies to improve specific areas of the state designated by the Legislature.
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.
HEA	Hawai'i Ecotourism Association promotes communication and education about ecotourism issues, provides an information and resource network for visitors, residents, tour operators, resources managers, planners, educators, government agencies, and other professionals; promotes a visitor industry that is environmentally and culturally sensitive, promotes community-based, sustainable economic development that benefits local residents; enhances visitor experiences through effective interpretation; and promotes resource conservation.

HFBF	The Hawai'i Farm Bureau Federation is a non-profit organization of farming families united for the purpose of analyzing problems and formulating action to ensure the future of agriculture thereby promoting the well-being of farming and the state's economy.
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.
HRA	Hawai'i Restaurant Association works to maintain the highest standards in food, service, health, employment, citizenship, fair compensation, competitive purchasing, industry, and reasonable profit.
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.
Legislature	Convenes once a year in Regular Session (between January and May) to consider subjects for legislation, including an annual state operating and capital improvements budget. Includes standing committees on tourism, the environment, and economic development.
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, 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.
OP	Office of Planning maintains overall framework to guide the development of the state through comprehensive, long-range, and strategic planning to meet the needs of Hawai'i's people and provide for the wise use of Hawai'i's resources.
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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