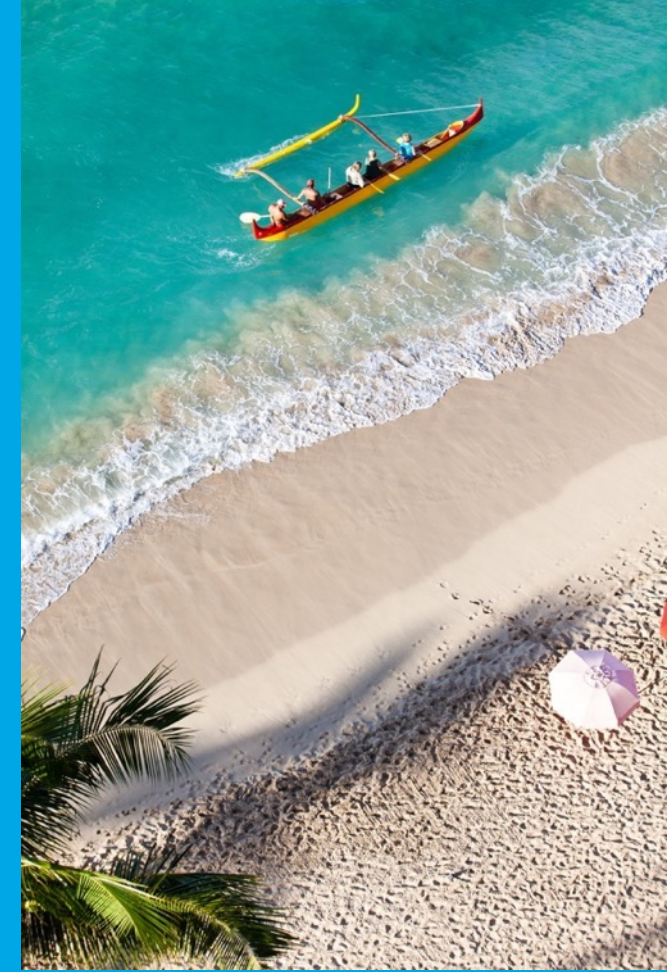


Tourism Impacts on O'ahu: Destination Management Plans in Hawaii.

How much is too much?



Dolan Eversole, University of Hawai'i Sea Grant Program



**Resilience
Office**

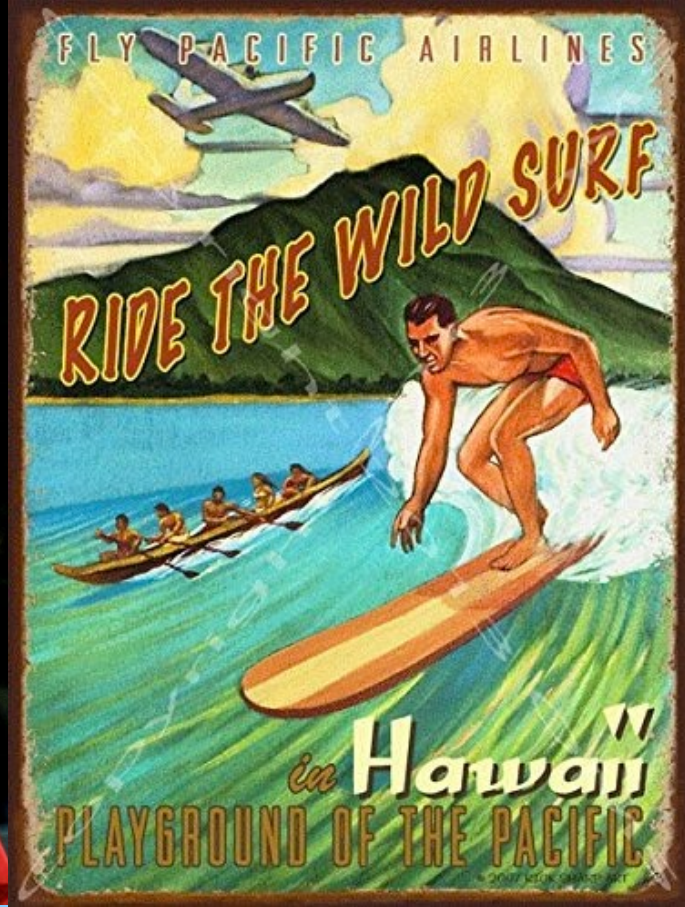
Office of Climate Change, Sustainability and Resiliency



A long history of tourism in Hawaii

Hospitality is in the Hawaiian culture and history (*Ho'okipa*)





Windward O'ahu, Tourism Assessment

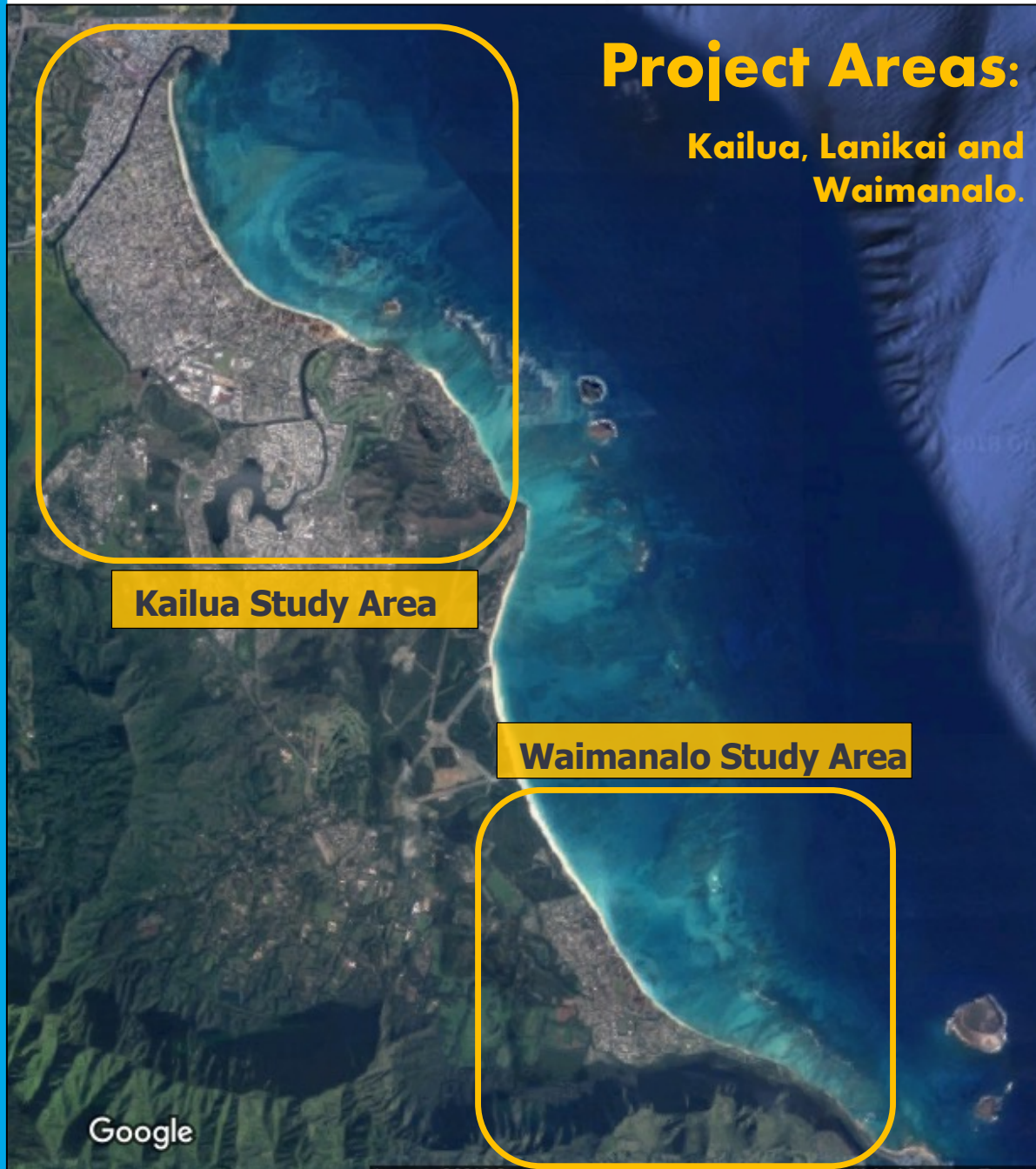


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Project Areas:

**Kailua, Lanikai and
Waimanalo.**



Kailua Study Area

Waimanalo Study Area



PROJECT SCOPE

- **Assess social, economic and resource impacts.**
- **Provide outreach and education for communities.**
- **Evaluate community perception of tourism.**
- **Evaluate and prioritize options to address issues.**
- **Develop transferable methodology.**
- **Design a comprehensive implementation strategy.**

Project Components

✓ Stakeholder Interviews

Over a dozen community stakeholder interviews conducted prior to the development of the survey.

✓ Beach park Carrying Capacity Study



452 from field surveys over 3 weeks in July and August, 2019. 87% response rate. 95% confidence level +/- 4.16%

✓ Resident Perception

Surveys delivered in July to October, 2019. 4,700 representative residents.

✓ N=619 Kailua n= 225 Waimanalo

✓ Final Report

Survey summary and recommendations for improving visitor management "hot spots."

✓ Visitor Intercept Surveys

Intercept surveys conducted in July, 2019.

n= 506 Kailua, n= 377 Waimanalo



✓ Community Outreach

Community outreach December, 2019.



Project Reports

Socioeconomic Impacts of Tourism in Kailua and Waimānalo, Hawai'i



Daniel M. Spencer, Ph.D.
Professor
School of Travel Industry Management
University of Hawai'i at Mānoa

Laura Lesar, Ph.D.
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A Contribution to the Windward O'ahu Tourism Assessment. Sponsored by the City and County of Honolulu and Hawai'i Sea Grant

Recreational Use and Management at Kailua Beach Park



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<https://seagrant.soest.hawaii.edu/sustainable-coastal-tourism/>



CENTER FOR **SUSTAINABLE COASTAL TOURISM**

Hawai'i Tourism Forecast

2023

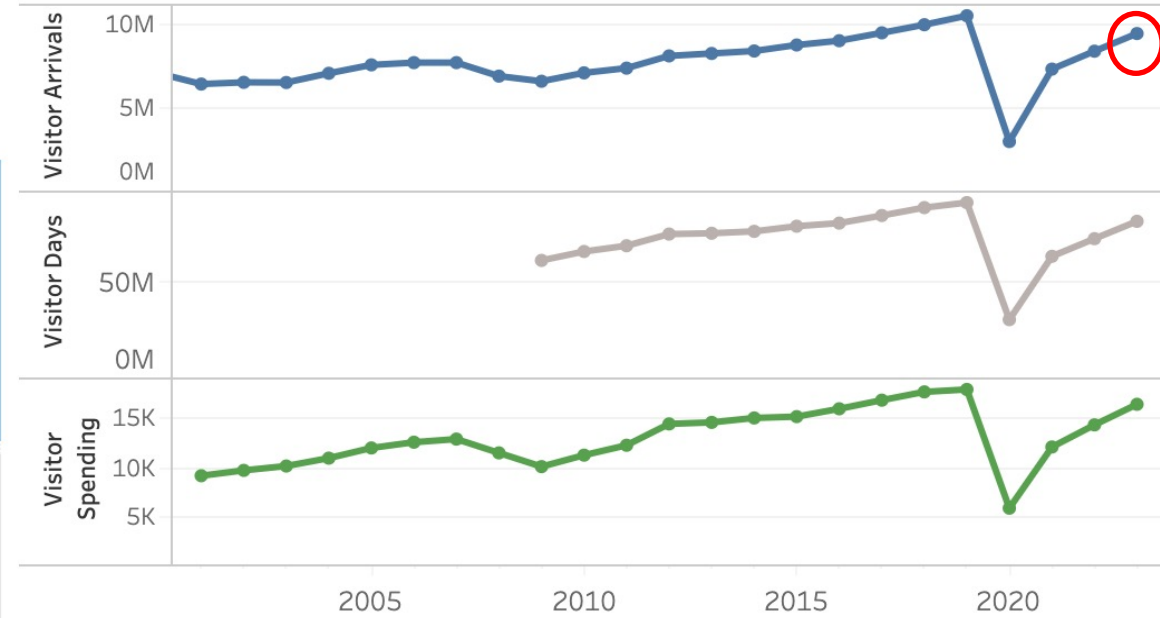
DBEDT QUARTERLY TOURISM FORECAST

Select Year:
 Select Market:

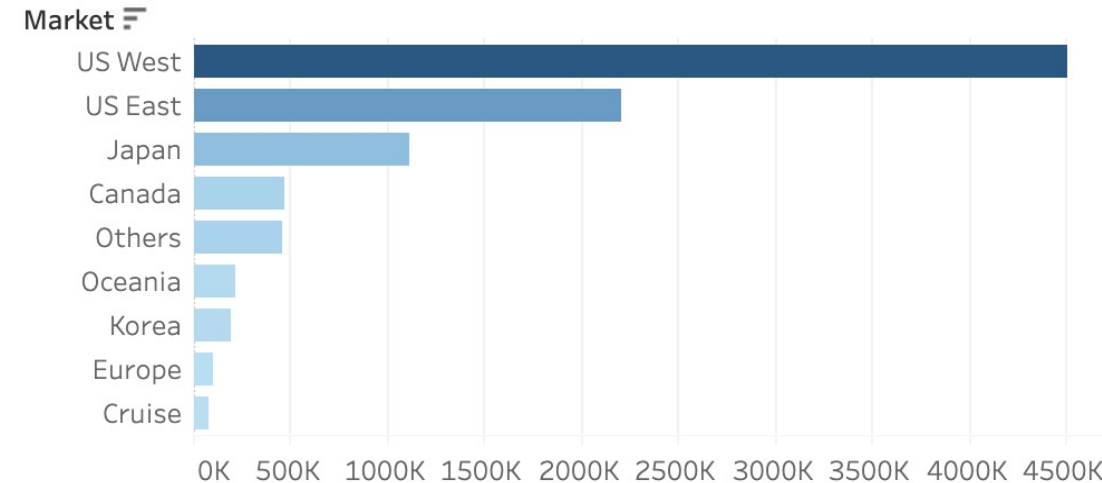
9.4M Visitor Arrivals (million persons)	12.7% % Change in Visitor Arrivals from Previous Year
81.15M Visitor Days (million days)	12.5% % Change in Visitor Days from Previous Year
\$16.4B Visitor Spending (billion \$)	14.7% % Change in Visitor Spending from Previous Year

This dashboard was developed and is maintained by the Research & Economic Analysis Division (READ) at the Hawaii State Dept. of Business, Economic Development, & Tourism. Historical data is from the Hawaii Tourism Authority and projections are made by READ.

2023 = 9.4 million



Visitor Arrivals by Market: 2023



9,400,000

2023 projected annual visitor arrivals.



Annual Visitor Arrivals to Hawaii From 1921-2017

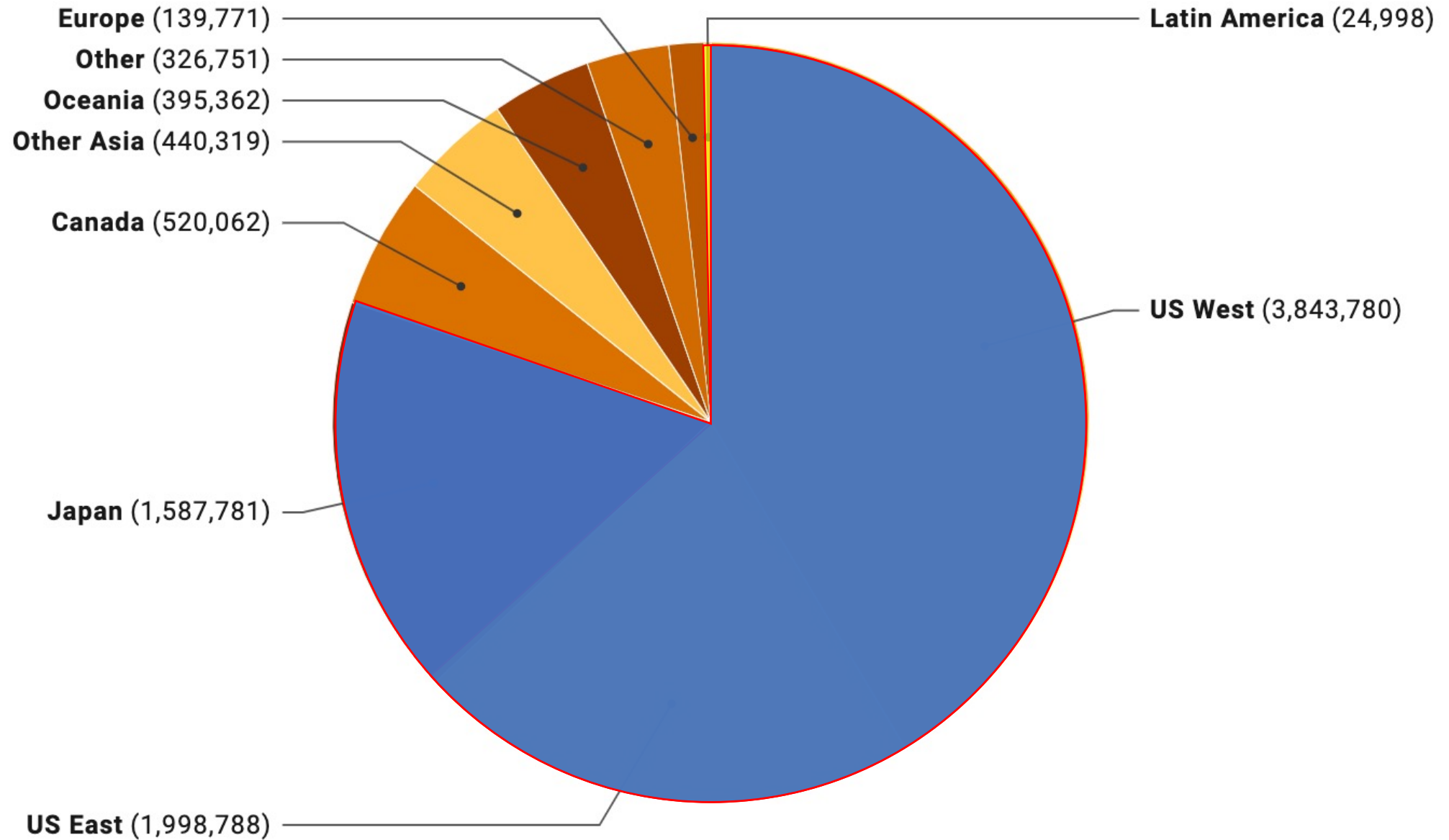


The visitor industry was suspended during World War II, so there is no data for years 1942-45.

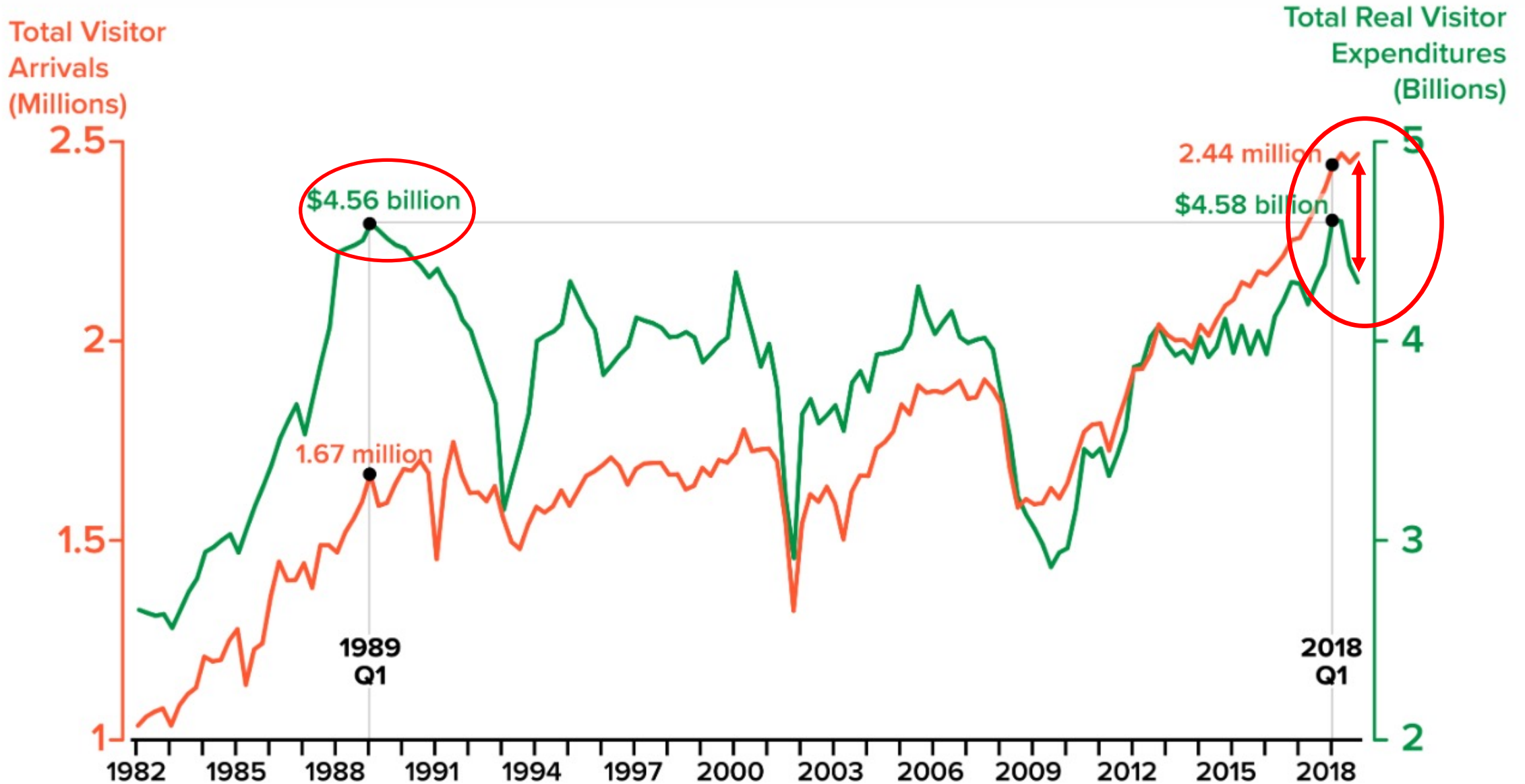
Chart: Carlie Procell/Civil Beat • Source: HTA, DBEDT • Get the data • Created with Datawrapper



Where Visitors Come From



More Tourists, Same Revenue



Numbers in chart are quarterly totals.

Is The Public Turning Against Tourism?

“Tourism has brought more benefits than problems”

2009

78%

of respondents somewhat or strongly agreed

2018

59%

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

2009

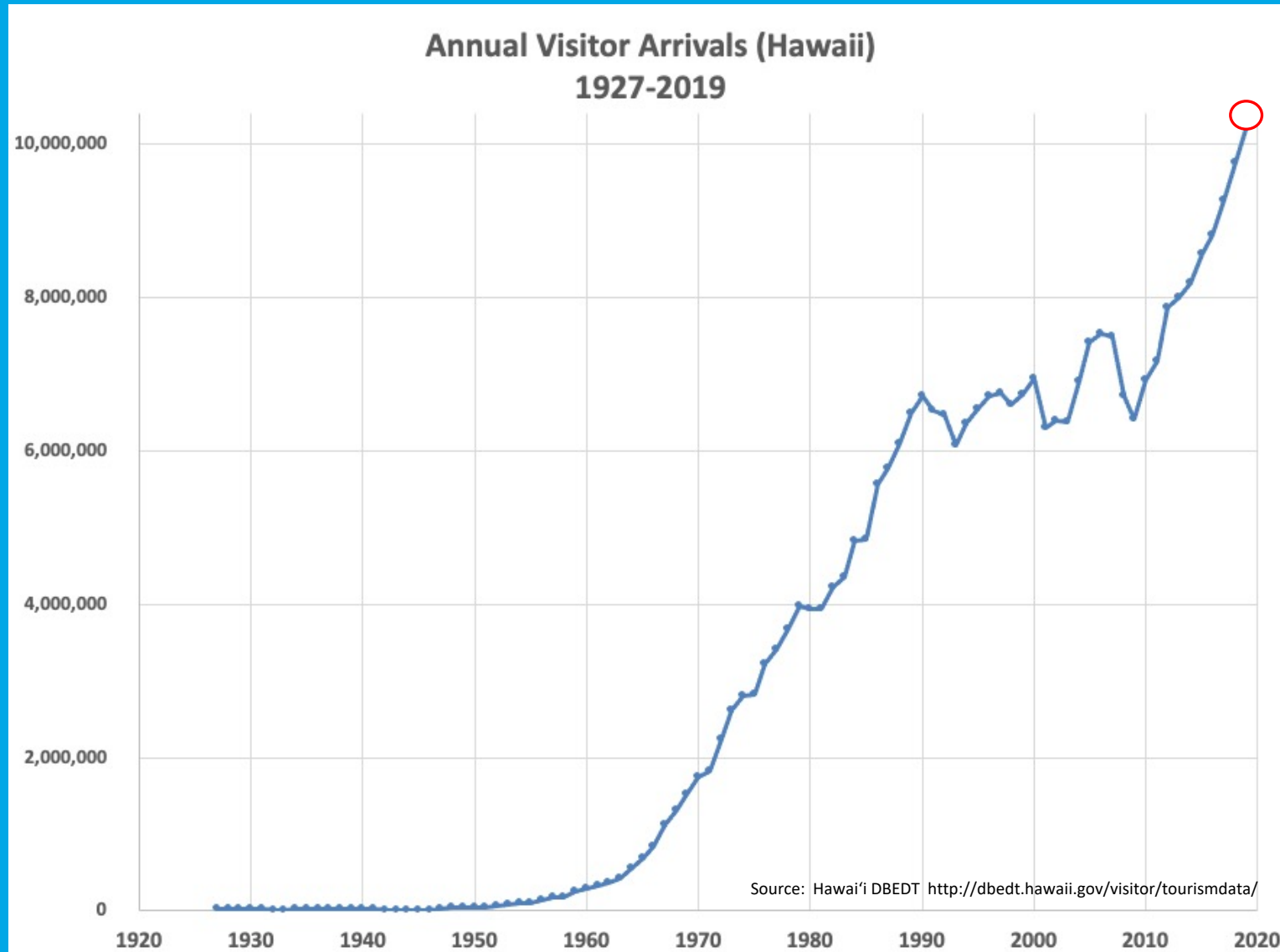
49%

of respondents somewhat or strongly agreed

2018

66%

What if we compare resident satisfaction?



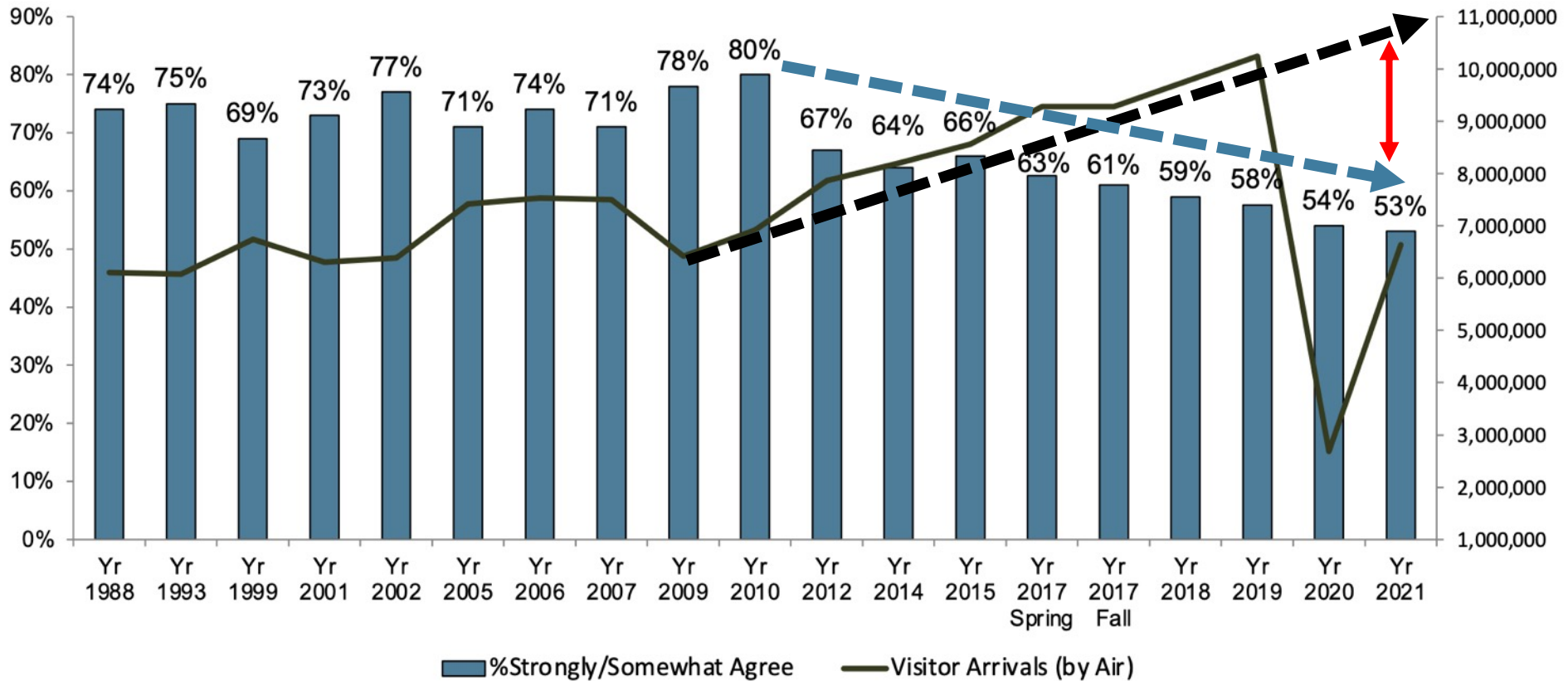
**10.4 Million
(2019)**

“Tourism has brought more benefits than problems”

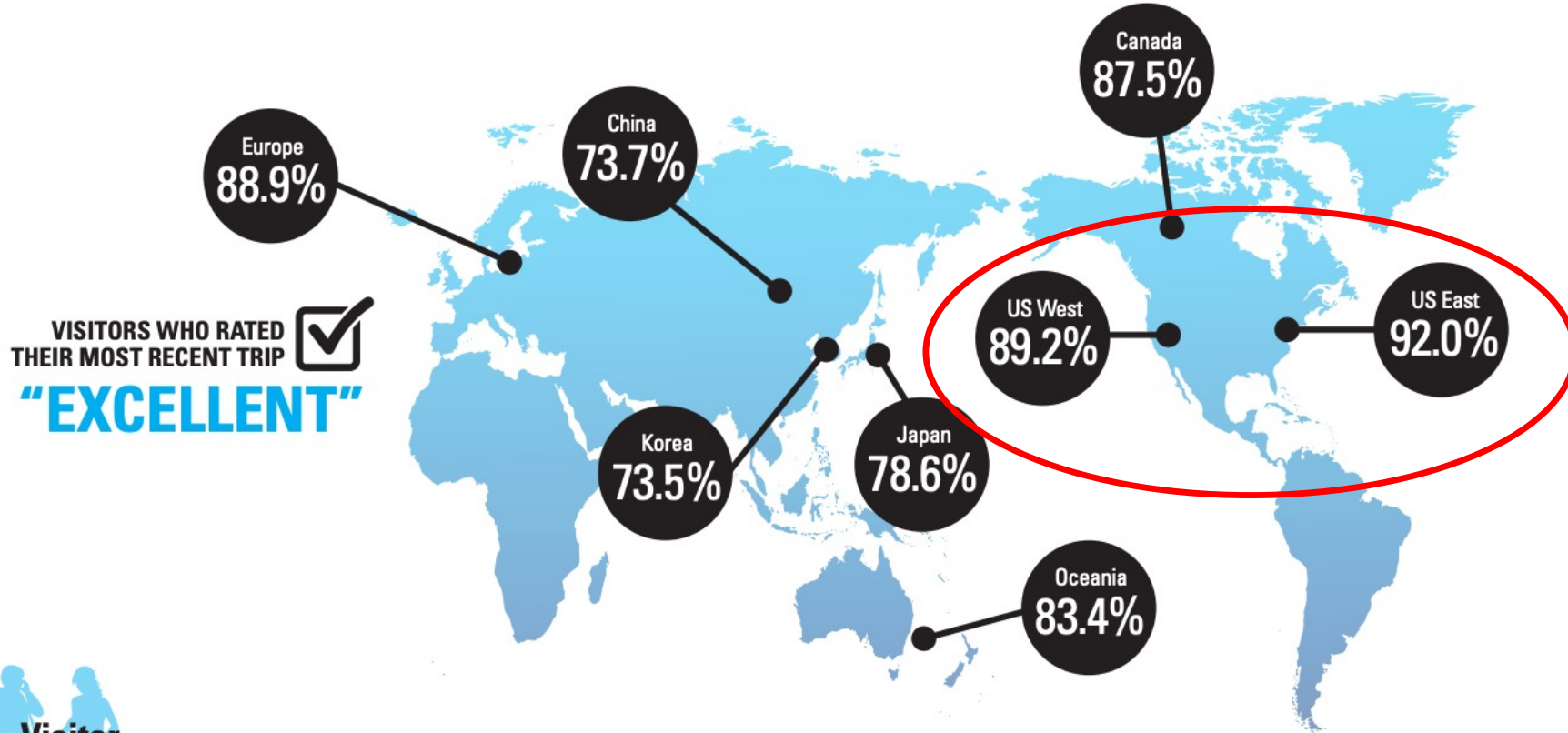
Source: Hawai'i Tourism Authority

% strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-to-10 on 10 Point Scale)

Annual Visitor Arrivals



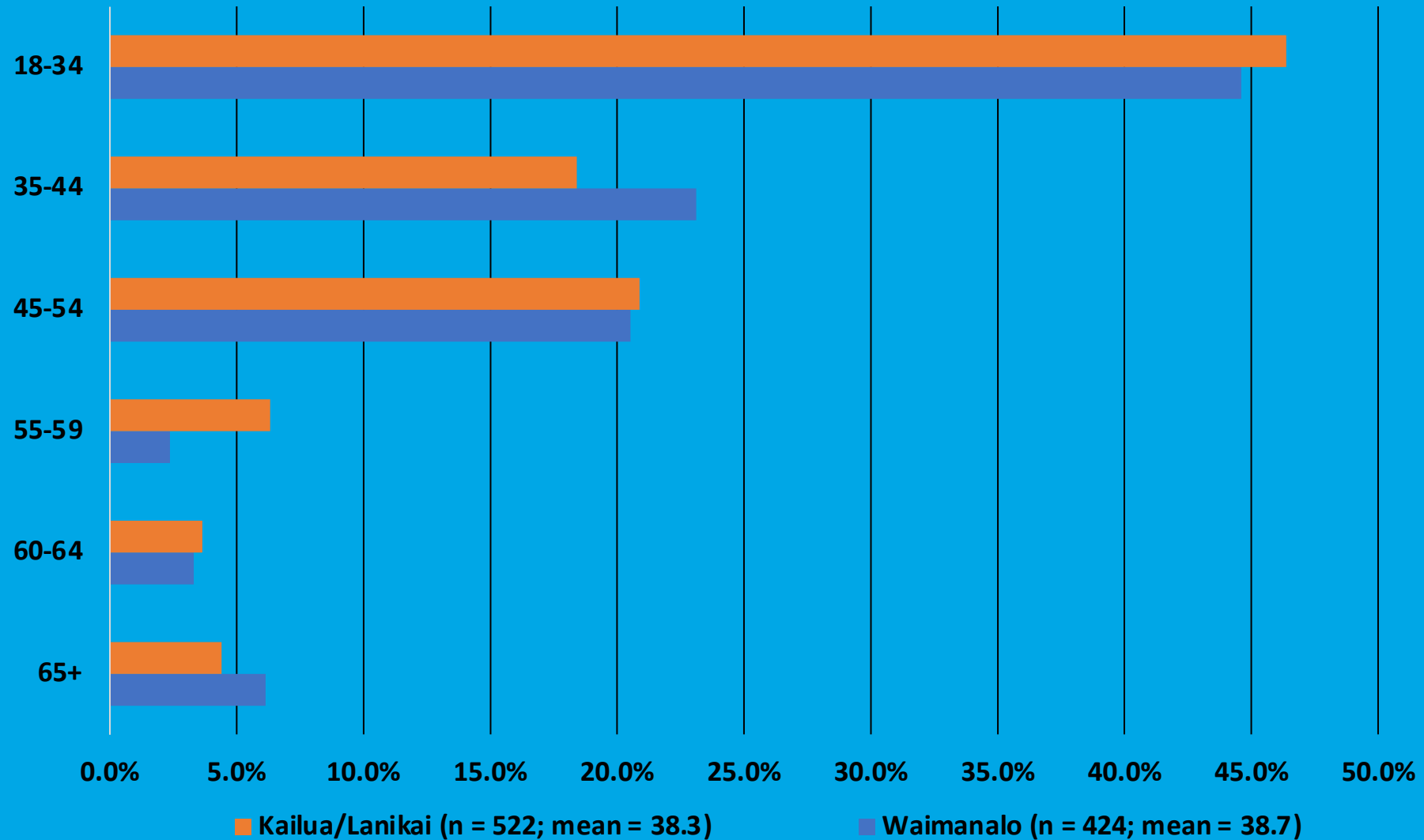
Hawai'i Tourism Authority Resident Satisfaction Survey (2021)



Visitor Profile by MMA

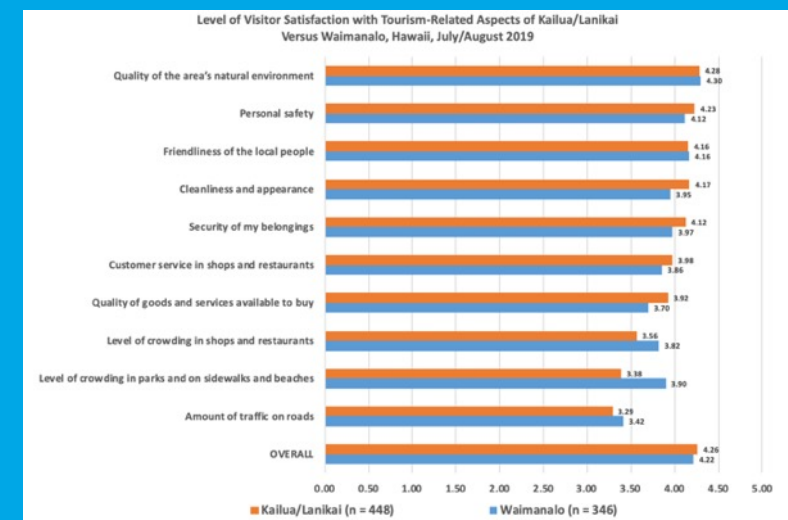
	US West	US East	Japan	Canada	Europe	Oceania	China	Korea
Average Age	52	52	40	52	48	51	36	35
Affluent Households	24% \$200K+	27% \$200K+	12% ¥15M+	21% \$200K+	13% \$200K+	16% \$200K+	9% ¥1,253,600+	24% ₩92,391K+
Education	35% College Grad	36% College Grad	54% College Grad	33% College Grad	31% College Grad	32% Post Grad	53% College Grad	58% College Grad

Age Distributions of Visitors to Kailua/Lanikai Versus Waimanalo, Hawaii, July/August 2019



Windward Resident Visitor Satisfaction Surveys *Top* Scored Values. (2019)

1. Quality of the Natural Environment (4.28)
2. Personal Safety (4.23)
3. Friendliness of locals. (4.23)
4. Cleanliness and appearance. (4.17)
5. Security of Belongings.



Note: Scale ranged from 1 ("Extremely Dissatisfied") to 5 ("Extremely Satisfied")

Windward Resident Visitor Satisfaction Surveys *Lowest Scored Values.*

1. Traffic on roads (3.29)
2. Traffic in parks and beaches (3.38)
3. Traffic in shops (3.56)



Recommendations

In the case of both resident surveys, respondents indicated that the following should be considered top priority issues:

- ***Effective leadership*** to solve problems caused by tourism,
- Negative effects of tourism on the ***natural environment***,
- Amount of ***traffic on roads*** as a result of tourism,
- Negative effects of tourism on ***cleanliness and appearance***,
- Level of ***crowding in parks*** and on sidewalks and beaches as a result of tourism, and
- Negative effects of tourism on the ***overall quality of life***.



Report Recommendations

1. Traffic management and transportation plan
2. Kailua Beach park Management Plan
3. Stakeholder advisory committee to develop strategies
4. Social media information management
5. Resource use fees and ranger enforcement
6. Improved education of visitors



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Socioeconomic Impacts of Tourism
in Kailua and Waimānalo, Hawai'i

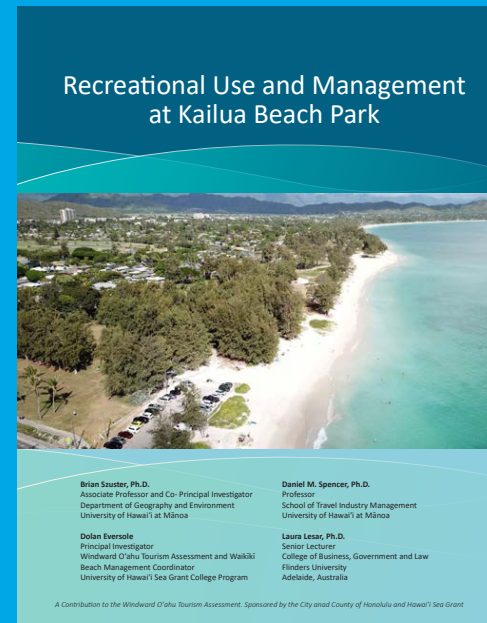
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“

“I don’t think tourism is being managed at the expense of residents in Kailua,...in fact, I don’t think tourism is being managed at all.”

Laura Thielen, Hawai’i State Senator (Senate District #25) August, 2019

WHO Should manage Tourism in Hawai'i?



State and local Government?

- Hawai'i Tourism Authority
 - State Department of Business, Economic development and Tourism
 - Department of Land and Natural Resources
 - Hawai'i Coastal Zone Management Program
 - City and County of Honolulu
-
- *New state office?*
 - *New local office?*
 - *University role?*

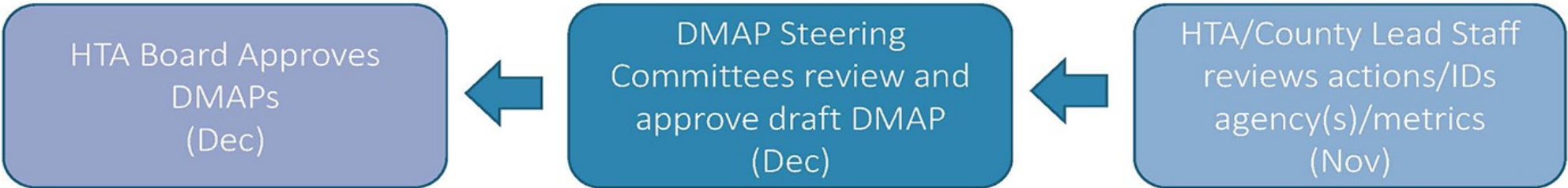
HAWAII TOURISM
AUTHORITY



Then HOW do we manage tourism in Hawai'i?

Is it even possible to effectively manage
tourism in Hawaii?

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



As defined in HTA's Strategic Plan 2020-2025 destination management includes:

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



MAHALO!

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<https://seagrant.soest.hawaii.edu/sustainable-coastal-tourism/>

