Windward, O’ahu Tourism Assessment

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Google Search: “Windward O’ahu Tourism Assessment”

Project Website: https://bit.ly/windward-tourism
Windward O‘ahu, Study Areas

Project Areas:
Kailua, Lanikai and Waimanalo
O‘ahu, Hawaii
PROJECT SCOPE

• Assess social, economic and resource impacts.
• Provide outreach and education for communities.
• Evaluate community perception of tourism.
• Evaluate and prioritize recommendations to address issues.
• Develop transferable research methodology.
• Design a comprehensive implementation strategy.
Project Components

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

**Resident Perception Surveys**
Delivered in July to October, 2019. 4,700 representative residents. N=619 Kailua n= 225 Waimanalo

**Visitor Intercept Surveys**
Intercept surveys conducted in July, 2019. n= 506 Kailua, n= 377 Waimanalo

**Kailua Beach Park Management Study**
452 responses generated from field surveys over 3 weeks in July and August, 2019. 87% response rate.

**Community Outreach**

**Final Report**
December, 2020 with survey summary and recommendations for improving visitor management “hot spots.”
Hawai‘i Tourism Forecast

2019: 10.4 million
2020: 2.9 million
2023: 9.4 million

SOURCE-DBEDT: http://dbedt.hawaii.gov/visitor/tourism-forecast/
Where Visitors Come From

- US West (3,843,780)
- US East (1,998,788)
- Japan (1,587,781)
- Canada (520,062)
- Other Asia (440,319)
- Oceania (395,362)
- Other (326,751)
- Europe (139,771)
- Latin America (24,998)

Chart: Carlie Procell/Civil Beat • Source: 2017 data from HTA & DBEDT • Get the data • Created with Datawrapper
More Tourists, Same Revenue

Numbers in chart are quarterly totals.

Source: HTA via UHERO  
Hawai‘i Tourism Authority Resident Satisfaction Survey (2017)

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

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

Source: https://hawaiitourismauthority.org/media/1288/2017-resident-sentiment.pdf
Is The Public Turning Against Tourism?

“Tourism has brought more benefits than problems”

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2009</td>
<td>78%</td>
</tr>
<tr>
<td>2018</td>
<td>59%</td>
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of respondents somewhat or strongly agreed

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>49%</td>
</tr>
<tr>
<td>2018</td>
<td>66%</td>
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of respondents somewhat or strongly agreed


Source: HTA Resident Sentiment Survey
“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/or 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?
Then HOW do we manage Tourism in Hawai‘i?

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

HTA Board Approves DMAP’s (Dec)
DMAP Steering Committees review and approve draft DMAP (Dec)
DMAP/County Lead Staff reviews actions/ID(s) agency(s)/metrics (Nov)
Community Input/Feedback (Oct/Nov)
DMAP Steering Committees’ Proposed Actions (Sept/Oct)
Foundation

MAHALO!

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Recommendations

1. Identify lead agency to provide leadership and facilitation of community-based destination management plans.

2. We need to have a better understanding of the actual number of people visiting the region (not just visitors but residents too) in order to better estimate the impact (negative and positive).

3. Develop multi-disciplinary group (State, City, HTA, University, etc..) to evaluate and conduct feasibility for Destination Management Plans and framework.

4. Strategic shift towards destination management integrated into each County’s tourism plan.

5. Modest improvement/maintenance to public parks in high-impact recreational beach areas is highly desired by these communities.