



**Your Voice Matters:
A Project to Address the Future of Tourism in Hawai`i**

**Hawai`i Chapter
Pacific Asia Travel Association
February 7, 2019**



INTRODUCTION



Introduction

- **The “Your Voice Matters” project emerged from the opinions of members of PATA-Hawai`i’s Executive Committee that despite our state’s outstanding climate, premier hospitality facilities, and abundant natural and cultural resources, the state and its visitor industry were making insufficient progress in advancing toward sustainability as a tourist destination.**
- **The Executive Committee also felt that careful planning for many forthcoming changes likely to profoundly affect Hawai`i and its visitor industry was not occurring.**

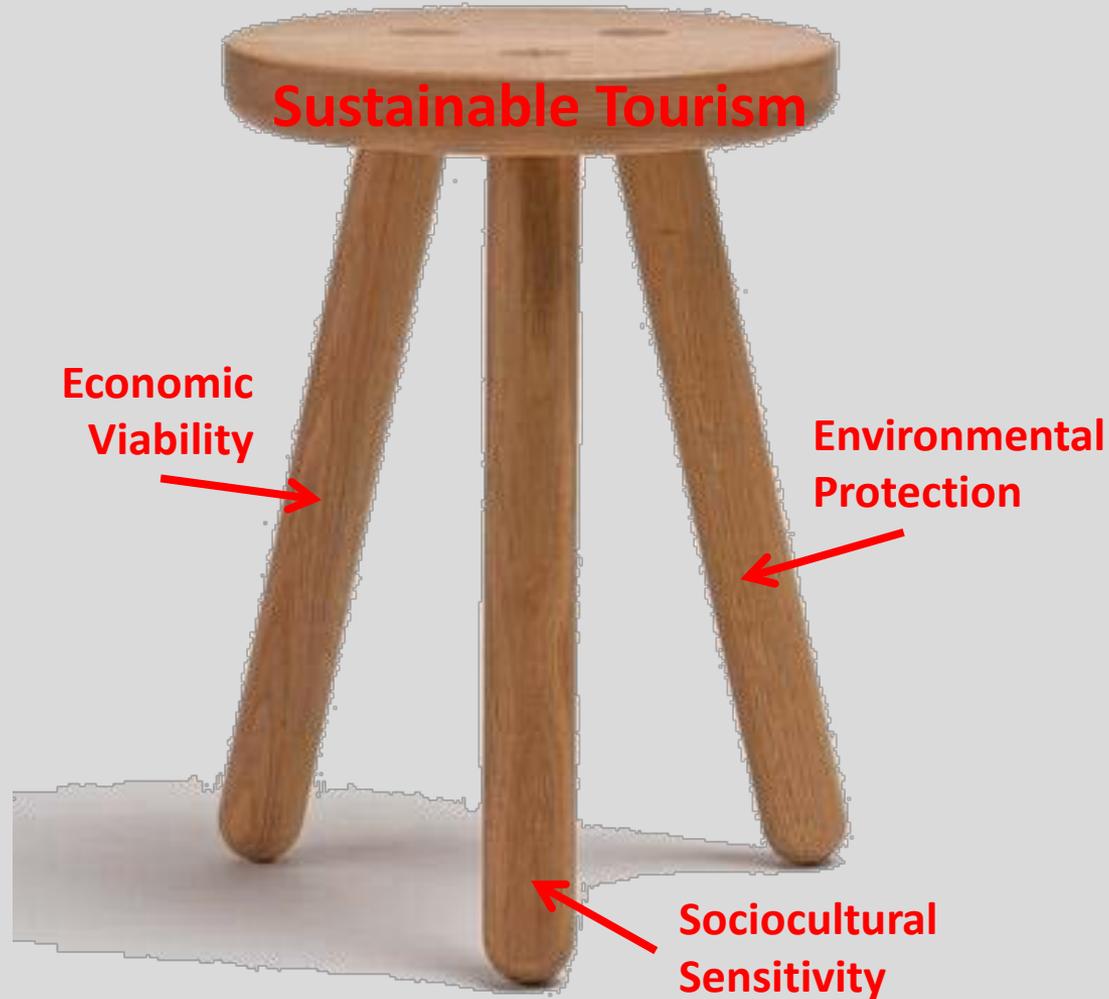
Introduction

- In April 2018 the PATA-Hawai`i Executive Committee acted on these concerns by initiating the “Your Voice Matters” project to identify the top issues facing Hawai`i’s visitor industry and generating broad-based action plans to address these issues.
- Issues have been, and will continue to be, identified by soliciting the views of Hawai`i visitor industry professionals.
- These views will be supplemented with the views of Hawai`i residents as determined by resident sentiment surveys conducted by the HTA and the University of Hawai`i.
- The project is supported entirely by PATA-Hawai`i; it has no funding or institutional mandate to achieve its goal.
- All work is being done on a volunteer basis by PATA-Hawai`i members.

Introduction

- **The purpose of the project is to encourage entities with the necessary authority and resources to devote more time, energy, and resources to ensuring the sustainability of Hawai`i's visitor industry, and to stimulate these efforts by supplying viable new ideas.**
- **The goal of the project is to advance the sustainability of Hawai`i's visitor industry by simultaneously optimizing:**
 - **the economic viability of the industry,**
 - **sensitivity to the values of the residents and communities that host our visitors, and**
 - **protection of the natural and cultural resources that make Hawai`i a unique place and attract visitors to its shores**

The “Triple-Bottom Line” of Sustainable Tourism



SIX PHASE APPROACH

- **Phase I** – Identification of the most important issues facing tourism in Hawai`i (accomplished in July 2018)
- **Phase II** – Identification of actions and programs to deal with these issues (three out of five workshops conducted in August and September; remaining two workshops to be completed later in 2019)
- **Phase III** – Presentation of results for feedback and further discussion at Global Tourism Summits (GTS) (feedback on three workshops obtained at 2018 GTS; feedback on remaining two workshops to be obtained at 2019 GTS)
- **Phase IV** – Integrate results of HTA and University of Hawaii resident sentiment surveys and draft report
- **Phase V** – Implement actions and programs to deal with key issues
- **Phase VI** – Monitor and evaluate actions and programs



PROGRESS TO DATE



Progress To Date

- **To date, we have:**
 - **conducted a workshop with, and an online survey of, visitor industry professionals to identify and prioritize key issues facing the industry,**
 - **conducted three additional workshops with visitor industry professionals and subject matter experts to identify and prioritize solutions to three of these issues, and**
 - **obtained feedback on identified solutions from visitor industry professionals attending the 2018 Global Tourism Summit**
- **All four workshops were conducted using the “Nominal Group Technique” (NGT) to generate and prioritize ideas**

Progress To Date

Details of Progress to Date

Date	Action
May 16, 2018	Initial workshop with 26 Hawaii visitor industry professionals to identify key issues confronting the industry. 34 issues were identified.
July 2018	Online survey of 600 visitor industry professionals to determine the relative importance of these 34 issues. 102 professionals responded.
Aug. 29, 2018	Workshop on how to best mitigate “negative impacts of tourism on residents and communities of Hawaii”, attended by nine visitor industry professionals and subject matter experts.
Sept. 5, 2018	Workshop on how to best deal with the “need to better protect Hawaii's natural environment”, attended by eight visitor industry professionals and subject matter experts.
Sept. 19, 2018	Workshop on how to best mitigate homelessness in Hawaii, attended by six visitor industry professionals and subject matter experts.
Oct. 2, 2018	Session conducted at Global Tourism Summit that obtain verbal and written feedback on proposed solutions identified in the above workshops from 68-100 visitor industry professionals.



ISSUES AND SOLUTIONS IDENTIFIED TO DATE



Issues and Solutions Identified To Date

Top 10 Issues Affecting the Sustainability of Hawai`i's Visitor Industry Over the Next Decade, as Perceived by Hawai`i Visitor Industry Professionals

Rank	Issue	Mean Importance*
1	Need to better protect Hawai`i's natural environment	6.24
2	Homelessness	6.23
3	Inadequate transportation facilities and infrastructure	6.02
4	Visitor safety and security	6.00
5	Negative impacts of tourism on residents and communities of Hawai`i	5.90
6	Inadequate strategic vision and leadership in the visitor industry and the Hawai`i Tourism Authority	5.88
7	Lack of respect for, and understanding of, state's visitor industry in government and the citizenry	5.82
8	Recruitment and retention of a quality workforce for Hawai`i's visitor industry	5.80
9	Crisis preparedness	5.80
10	Need for a healthy airline industry and pro-active maintenance of airlift	5.76

*On a scale from 1 ("Not at all important") to 7 ("Extremely important"). Results are based on responses from 102 Hawai`i visitor industry professionals surveyed online by PATA-Hawai`i from May 21, 2018 to August 2, 2018.

Issues and Solutions Identified To Date

Top 10 Issues Affecting the Sustainability of Hawai`i's Visitor Industry Over the Next Decade, as Perceived by Hawai`i Visitor Industry Professionals

Rank	Issue	Mean Importance*
1	Need to better protect Hawai`i's natural environment	6.24
2	Homelessness	6.23
3	Inadequate transportation facilities and infrastructure	6.02
4	Visitor safety and security	6.00
5	Negative impacts of tourism on residents and communities of Hawai`i	5.90
6	Inadequate strategic vision and leadership in the visitor industry and the Hawai`i Tourism Authority	5.88
7	Lack of respect for, and understanding of, state's visitor industry in government and the citizenry	5.82
8	Recruitment and retention of a quality workforce for Hawai`i's visitor industry	5.80
9	Crisis preparedness	5.80
10	Need for a healthy airline industry and pro-active maintenance of airlift	5.76

*On a scale from 1 ("Not at all important") to 7 ("Extremely important"). Results are based on responses from 102 Hawai`i visitor industry professionals surveyed online by PATA-Hawai`i from May 21, 2018 to August 2, 2018.

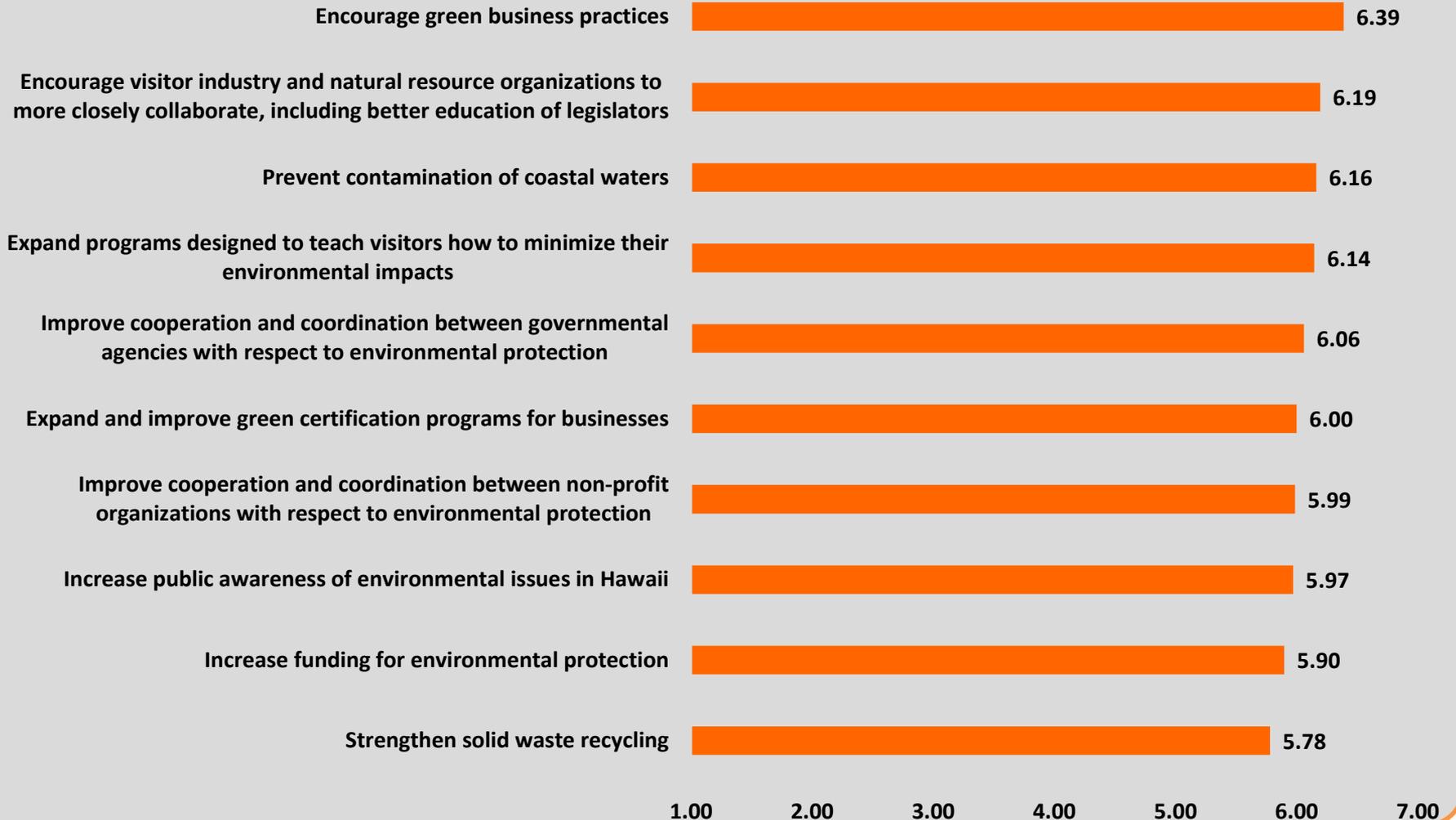
Issues and Solutions Identified To Date

TOP 10 ACTIONS PROPOSED BY VISITOR INDUSTRY PROFESSIONALS AND SUBJECT MATTER EXPERTS TO MITIGATE THE NEGATIVE IMPACTS OF TOURISM ON RESIDENTS AND COMMUNITIES OF HAWAII (n = 100)



Issues and Solutions Identified To Date

TOP 10 ACTIONS PROPOSED BY VISITOR INDUSTRY PROFESSIONALS AND SUBJECT MATTER EXPERTS TO BETTER PROTECT HAWAI`I'S NATURAL ENVIRONMENT (n = 69)



Issues and Solutions Identified To Date

TOP 10 ACTIONS PROPOSED BY VISITOR INDUSTRY PROFESSIONALS AND SUBJECT MATTER EXPERTS TO MITIGATE HOMELESSNESS IN HAWAII (n = 68)

