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Lavonne Leong

A series of the series of the

**JANUARY 2018** 

The number of tourists coming to Hawaii keeps climbing and many are now crowding into places that were once reserved for locals. It's a worldwide situation. However, the solution to "overtourism" may not be to cap the number of visitors but to make sure they share the burden of maintaining our aina and infrastructure before both are all used up.

### It happens two or three times a week.

An "Adventure Tours" SUV pulls up outside my house. The passengers disembark and, with the slightly disoriented look common to tour groups everywhere, they take selfies with the little house across the street, which has become a repeat location on "Hawaii Five-o." Sometimes they point their phones at my house, too, maybe because of the beautiful green mountains behind it. I'm cool with tourists; Lord knows I've been one enough times myself. But this didn't used to happen, and it feels a little weird.

Then there's my former favorite beach. As a teenager, the beach was my bolt-hole, a strip of solitude where sea met shore, north of Haleiwa. Then the Hawaiian green sea turtles found it too, and shortly after that came the tour buses, and the crowds. In the 1990s, I might have seen two or three other people when I visited. I went three weeks ago on a weekday and counted 93 people and two turtles. It was the first time I'd been to Laniākea in years.

These days, everybody who lives in Hawaii seems to have a story like that. During the writing of this piece, everyone who has asked me what I'm working on has ended up telling me their own account of the crowds at former favorite spots: Manoa Falls, Makapuu Lighthouse, Morning Glass Café.

Even George Szigeti, president and CEO of the Hawaii Tourism Authority, has a story, about the place he calls "my café in Kaimuki," Café Kaila. "I used to go every morning, their breakfast is so good," he says, "but the Japanese (tourists) got wind of it, and now it's like a 20-minute waiting list." Szigeti is mindful that it's a sign that he's doing his job. "But you know what," he continues, "I love it. These visitors want that experience, and they walk out with a smile on their face." That still doesn't mean he's there every morning, anymore.

# **Breaking Records**

**What the heck** is happening? Hawaii is on track to log 9.2 million visitors in 2017. That's a record – up from 6.5 million just eight years ago – and the numbers are set to keep going up in 2018 and beyond. Szigeti says the volume has taken the tourism industry by surprise; as recently as 2015, when he first joined HTA, tourism growth was forecast to flatline as Millennials sought ever more exotic places, and destinations across the globe rolled out the welcome mat.

There's no hard data, but many suspect Hawaii's unexpected uptick in visitor

traffic reflects a growing global appetite for travel combined with a narrowing number of visitor destinations perceived as safe. Says James Mak, a fellow of the UH Economic Research Organization (UHERO) and author of the book "Developing a Dream Destination: Tourism and Tourism Policy Planning in Hawaii": "Part of the surge in numbers is because Americans are now less interested in traveling internationally than traveling to Hawaii. It's a safe place."

Both reflecting and enabling this trend, many airlines are either increasing the number of seats to Hawaii or jumping into the market, as Southwest Airlines and AirAsia X are doing. United Airlines alone is adding 400,000 air seats to the islands in the near future, mostly direct flights from the Mainland to the outer islands, with each roundtrip counted as a single air seat. "Even three years ago, we were at 10 million seats," says Szigeti. "Now, we're heading just a notch above 12 million." And climbing.

The infamous crowd at the KCC farmers market

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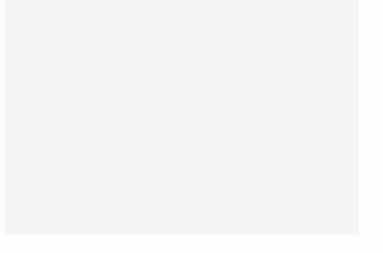
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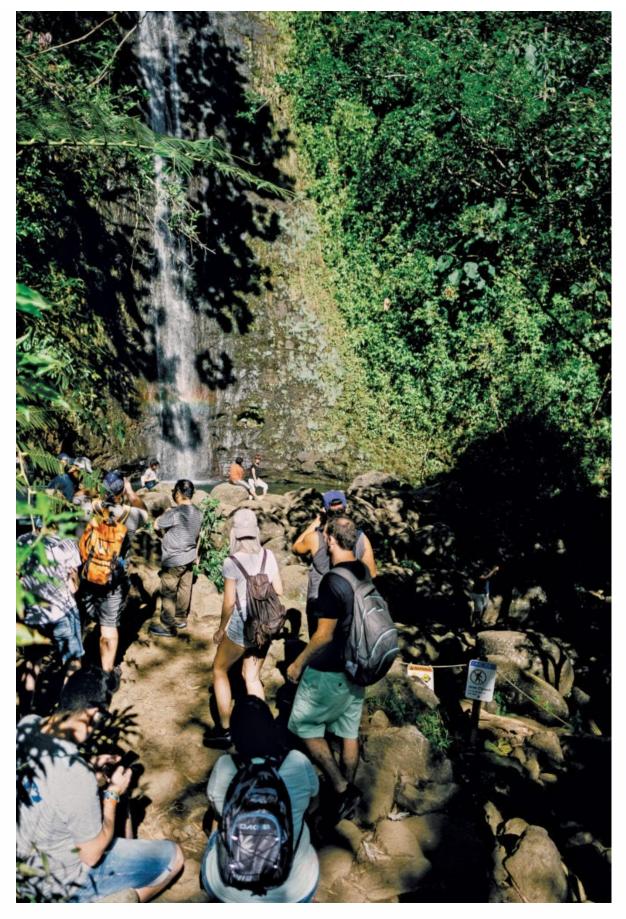
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**JANUARY 2018** 

# **Changing Habits**

**But it's not** just the numbers that are making the Islands feel more cramped. If the human headcount on my favorite beach had only kept pace with the rise in tourism, it might have risen 30 percent, not nearly fiftyfold. Globally, travel habits have evolved. Whereas in past generations visitors to Hawaii could be found mostly in resort areas, the past two decades have seen a strong shift toward visitors seeking "authentic" or "secret" experiences and looking to stay outside designated tourist areas like Waikiki. Books like the "Hawaii Revealed" series, which first outed a plethora of hidden Hawaii destinations to visitors in the 1990s, capitalized on that desire. ("Find deserted beaches, hidden waterfalls and lush rain forests. As well as scores of other hidden gems listed *nowhere* else," says its website.)

And for the Millennial generation, experiencing the world this way is a given. "They're a different traveler," says Szigeti. "My daughter is 24. She's not going to sit by the pool and have a mai tai for a couple of days. She's going to get on her phone and go, 'Where do locals hike? Where do locals swim? Where do locals eat?' Therein creating new challenges. They're going into uncharted areas, they're going into communities, they're hiking, they're swimming, they're diving off cliffs that before weren't even on the map."



Crowd of visitors at the Manoa falls hiking trail

They're also using technology tools that didn't exist a decade ago. Vacation rental sites like Airbnb and VRBO enable tourists to base themselves in residential areas. Now there's an Airbnb rental in nearly every ZIP code in the state, and as of 2016, about 10,000 Hawaii Airbnb listings total (compared to 43,912 hotel rooms in the state for the same period). "The overcrowding is real. There's not much disputing that," UHERO Executive Director Carl Bonham says. "If you think about Kailua town, it's hard to call it a town anymore because of how much it has changed."

The rise of social media platforms like Facebook and Instagram, where pretty pictures serve as currency and inspiration, has also transformed visitor access in less than a decade. Suddenly, you don't even have to purchase "Oahu Revealed" to find out about secret places. You can just log on to Facebook to see friends' endless streams of vacation snaps, or to Instagram for a hailstorm of #luckywelivehawaii images. Many travelers are now choosing destinations based on their Instagram feeds; users can geotag the photos they post, and if there's a spectacular snap with no geotag, someone is sure to comment, "Where is this?"

"It's the world we live in now," says Szigeti. "Social media has made the world smaller and more accessible – to *everyone*. There are no secrets anymore."

Says Hawaii economist Paul Brewbaker, founder of TZ Economics, "It's not just that there are more tourists, but there are more people in general that know where the good stuff is. (Social media) has unleashed intensive utilization of natural environments and open access recreational resources, all within a few years."



"So much of what is happening is fueled by social media," agrees Dan Dennison, senior communications manager at the state Department of Land and Natural Resources. "That's where people get their ideas about places to go and see." It's not just about the finding, adds Dennison, but about the behavior once they're there: "(Social media) allows anyone and everyone to purport anything online, and people will take that as gospel truth." Even a brief search of Hawaii-related Instagram tags reveals people touching or getting too close to endangered species, climbing on fragile historical sites, hiking dangerous or off-limits but spectacular trails – all of which looks like it might be normal behavior if you're viewing it from your room in Wisconsin, or even from your dorm at UH.

"People think, 'I'm here in Hawaii.' It's that paradise syndrome: What can go wrong in paradise? They'll just chance it."

David Jenkins, Public information officer, Honolulu Fire Department

The lack of contextualizing safety or cultural information can encourage unsafe or cavalier behavior, agrees David Jenkins, the Honolulu Fire Department's public information officer. "People think, 'I'm here in Hawaii.' It's that paradise syndrome: What can go wrong in paradise? They'll just chance it." Asked about numbers, Jenkins sees "everything ratcheting up in the past four or five years" – both in numbers of hikers and of rescues conducted. 2015 saw 187 HFD-assisted mountain rescues on Oahu; in 2016, there were 260.

Brewbaker adds that each tourist who wants to experience as much of a destination as they can in a limited time, is predisposed to use public resources at a far higher rate than residents who are busy earning a living and can always get to a place next month, or next year: "When's the next time you're going to go hike to Lanikai Pillboxes? I grew up in (Kailua), and I've done that twice in my life. It's not just that there's been a preference shift to an experiential kind of tourism. It's that it's been so dramatically facilitated by breaking down the information asymmetry" – the kind that used to exist between locals who knew about secret places but only visited them once in a while, and tourists who came for a finite amount of time but were available and motivated to seek out several in one day. An experience-hungry tourist might use as many public resources in a week as a resident might use in a year.

A Japanese newlywed photoshoot in front of Hawaii theater. Many Japanese do this every day.

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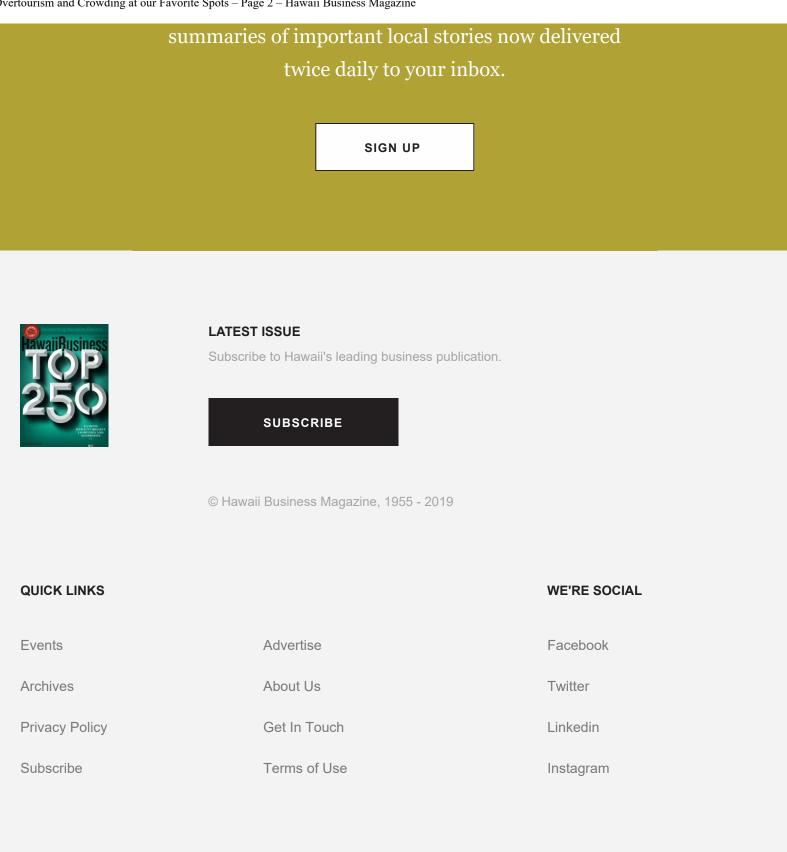
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**JANUARY 2018** 

## Worldwide Phenomenon

**It's not just happening in** Hawaii. Since the Great Recession, the tourism industry has become the world's largest employer, responsible for one in 10 jobs and 10 percent of global GDP, according to the World Travel & Tourism Council. Those changes have not come without growing pains. In 2017, anti-tourism demonstrations spread across southern Europe: Venice, Rome, Barcelona. Officials in Dubrovnik, the Croatian filming location for King's Landing in "Game of Thrones," just debuted visitor traffic surveillance cameras in the old city, which is also a UNESCO World Heritage Site; if the visitor count reaches 8,000, tourists will have to wait to enter until the number goes down.

Closer to home, editorials are appearing about "too many tourists" even in big cities like New York, and the most popular American National Parks are experiencing record numbers, lines and traffic. Even small-town "secrets" have been swamped; stories of places like the Little North Fork area near Keizer, Oregon, and Hanging Lake in Glenwood Canyon, Colorado, being "loved to death" are a dime a dozen on the internet. While many of these places are photogenic and accessible, they're probably not on anyone's lifetime bucket list, but they are still at risk.

So, how many tourists are too many? Mak says that instead of talking about "carrying capacity," which implies a set number of visitors a destination can handle, many decision-makers now are talking about "overtourism" (coined in 2012 from a Twitter hashtag), which takes many variables into account but still expresses the sense that there is a threshold for "too much." The feeling that success can be a double-edged sword has hit home, even with Hawaii's major tourism industry players. At this year's HTA annual industry conference, where you might expect "record numbers" and rah-rah, there was also a strong undercurrent of worry about how to prevent overtourism from affecting the state's residents, and ultimately, the visitor industry itself. Szigeti asked the question in his uncharacteristically sober opening address, and it kept being posed throughout the three-day conference, notably in a keynote by Ólöf Ýrr Atladóttir, VP of the European Travel Commission and director general of Iceland's tourist board.

"People are traveling globally as never before," said Atladóttir. "There are more people in the world (for whom) international travel is part of their daily life. And there is nothing that indicates that people will stop wanting to travel."

But the tourism industry is not like other industries, she added, which are historically kept apart from residential life. The resources used by tourists are increasingly those used by residents, which can put visitors and residents – or product and consumer – on a collision course. It's also important to remember that in this visitor industry model, residents are also resources. "An engineer uses a rock," said Atladóttir, "but tourism is based on resources that are much more ephemeral: nature, culture, private services, public infrastructure, people and society.

"They're using your road system, they're using your cafés, all of the stuff you want to enjoy. And that means that we as consumers are in direct relationship with the product, and we are emotionally attached" to the resources being used for the industry, said Atladóttir. That can get uncomfortable. Overtourism and Crowding at our Favorite Spots - Page 3 - Hawaii Business Magazine

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**JANUARY 2018** 

# **Tragedy of the Commons**

**It can also lead to** outcomes no one wants. One phrase that keeps popping up with respect to what's happening with global tourism today is "the tragedy of the commons." It sounds Victorian, and for good reason: It's an old economic concept that originated in Britain, where some of a town's land was often held in "common" so everyone in the community could graze their animals on it. But common resources only work when everyone who uses them also helps to steward them in some way. Otherwise you get the tragedy part – where individual users act only in their self-interests, using the resource for themselves before others can deplete or spoil it faster. "If you have a free good which is limited, your incentive is to take as much as possible before others get to it," says Mak. "Eventually, if you all behave in the same way, the asset is destroyed."

In Hawaii's case, our common resources are both natural (healthy oceans and shorelines, unique flora and fauna) and human (everything from infrastructure

and open space to culture and interpersonal trust). Hawaii is "totally" facing a tragedy of the commons, says Geoff Bolan, executive director of Sustainable Travel International. "In Hawaii, if you go to a park or a nature reserve, there might not be an entrance fee, but there's still impact. And it isn't necessarily just an environmental issue. It's also, 'Why are there so many people walking around by my home?' The 'commons' there is the sidewalk."

The problem, says Bolan, is not just individual visitors, but also private enterprises that are incentivized to use a public resource, whether it be a beach, a trail or a sidewalk, as extensively as possible while charging clients for access, knowledge, services and equipment. "A hotel or a resort or a tour operator, they're extracting (from), making money off, that resource. That's fine – but honestly, are they putting their 2 cents back into it? Should locals just have to deal with it – traffic and parking and annoying or insensitive behavior? I would say there's a large imbalance in Hawaii and many other places."

# **Tourism's Changing Role**

**Although spending per visitor** is up, tourism's economic benefits relative to its cost have gone down over the course of a generation. Statewide tourism receipts look to be reaching record highs, but adjustment for inflation finds that the industry actually brings in less than it did at its peak in 1989. "Tourism has been shrinking as part of the Hawaii economy measured in real dollars. People don't talk about that, but it is a fact," says Mak.

"It's not that we don't like 9 million people," agrees Brewbaker. "It's that when there were 7 (million), we made \$18 billion off them, and now that there are 9 million of them, we make \$16 billion off of them (after adjusting for inflation). Straight off the top, more *pilikia* for absolutely less money. How is that good math?"

Tourism has also been shrinking as a percentage of Hawaii's economy. Brewbaker wrote in a white paper produced for Hawaiian Airlines that tourism "declined from approximately 25 percent of gross (Hawaii) product in the mid-1990s, to approximately 15 percent of gross product in 2010, rebounding to an estimated 17 percent of GDP in 2012."

The stakes are twofold. First, if lines are longer, crowds are larger and foot and vehicle traffic are higher, all in an environment that wasn't built to handle these numbers, quality of life for local residents is diminished. Pointing out the economic benefits of tourism isn't enough to preserve aloha spirit, says Atladóttir: "I can throw statistics at (people) about the economic benefits and the unemployment rate until I'm blue in the face, but they'll just go, 'Yeah, but I couldn't get a seat at my café this morning, and I'm pissed off. This is too much."

Also at risk is the visitor industry itself, because the welcome that visitors receive from locals has always been key to a destination's reputation. "If you're not getting the warm looks and welcome from the locals, what does that mean?" says Bolan. "At some point, this common asset does come back to haunt you. It's not today and tomorrow," he says, but it's someday.

Mak points out that since 2005, more than half of Hawaii residents have agreed

with the statement on recent HTA surveys, "This island is being run for tourists at the expense of local people," and that other indicators of resident satisfaction with the tourism industry are also slipping. "If we don't do anything about it, I think the surveys speak for themselves," says Mak. "More people in Hawaii now think the state is run more for the benefit of tourists than for locals. That would be dangerous for us. It would result in erosion of the aloha spirit" – the same aloha spirit that Szigeti calls "the key ingredient that separates us from other sun-sandsurf destinations."

But Mak and Brewbaker don't think visitor numbers should stagnate or shrink. Brewbaker points out that "tourism is to Hawai'i as petroleum is to Saudi Arabia and high technology is to Silicon Valley," and describes it as "the reason for Hawaii's modern economic success." "It's our economic engine," says Szigeti, from his office in the Convention Center. "I ask everybody to look out that window and tell me who our No. 2 (industry) is." Overtourism and Crowding at our Favorite Spots - Page 4 - Hawaii Business Magazine

Methodology:These responses were part of two larger surveys conducted by Anthology Marketing Research for Hawaii Business in the fourth quarter of 2017. The BOSS survey reached 402 local business leaders by telephone statewide; the Island Issues survey reached 466 residents by telephone and internet.

The visitor industry provides not only jobs and GDP, but also facilitates the excellent domestic and international air access that Hawaii residents see as

essential to life on the rock. And unlike many other industries, tourism depends upon and supports cultural uniqueness and natural beauty, two things that enhance resident quality of life, too. Brewbaker, like most of his colleagues, argues for smart management instead of constraints on growth, and urges leaders not to "equate sustainability with restrictions on tourism capacity."

In fact, although everyone I spoke to acknowledged that at some point the visitor/resident ratio can become overwhelming no matter how well the visitor industry is managed (Venice, for example, has 55,000 residents and 30 million visitors annually), no one who has studied the issue said Hawaii was near that absolute limit. But there was a pervasive sense that our old model of designating tourist districts – which still works well for places like Las Vegas, whose 43 million tourists stay mostly on the Strip while its 600,000 residents largely live, work, and play elsewhere – had been rendered obsolete in the past two decades.

We need a new approach.

DLNR QR code on a hiking trail educational sign

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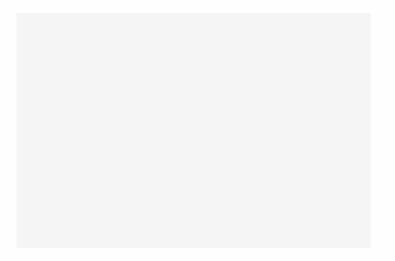
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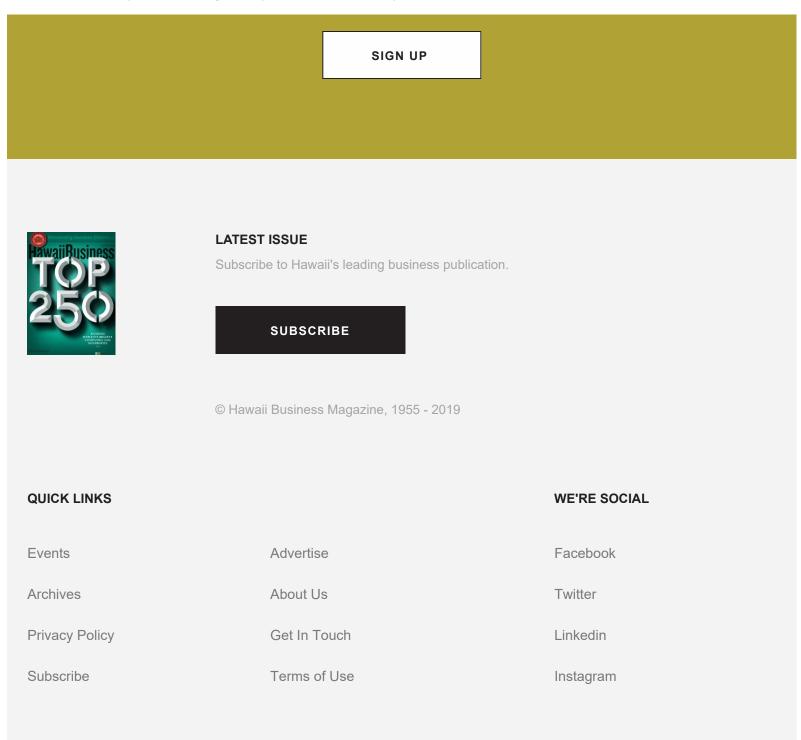
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**JANUARY 2018** 

## It's Not Just Them, It's Us

Not all the crowding at recreational and beauty spots is caused by tourists. Even residents are susceptible to the pressure to get out and post their jaunts on Instagram. Short-term residents like @stefanconey96, whose Instagram profile says he's from Great Britain but plays tennis for UH Hilo, post photos of lush (and sometimes illegal) locales with captions like, "Never waste a day in Hawaii!" The hashtag #luckywelivehawaii is attached to 1.8 million Instagram posts, and many show people getting too close to endangered species or hiking forbidden areas.

"There's a national trend of getting out and enjoying the open," says Honolulu Fire Department public information officer David Jenkins. "It's more than just visitors in terms of new people on the trail. There are new residents, people who just moved to Hawaii who are not visitors but still new to the island, and military personnel." And although visitors may flout trespassing signs or get themselves into dangerous situations, the DLNR's Dan Dennison thinks that it's not visitors who do many of the most destructive things, including staging raves at sensitive sites, vandalism and abusing native species: "A lot of the really egregious behavior that we've seen has largely been residents, to be honest."

## How to Fix It

**The solution** is not in placing some kind of cap on the number of visitors, industry experts say. At least not yet. "I have certain policymakers who say, 'George, we can't have any more people in my district!' But I don't have a switch that turns it on and off," says Szigeti.

In the short term, we're not talking about a single solution, but a bunch of solutions for challenges related to more humans doing more things in a confined space: to name a few, unpleasant crowding, eroding trails, decaying infrastructure, coral reefs that are harmed by the oxybenzones in many sunscreens. When looking at case-by-case solutions, Hanauma Bay – which limited the number of people a tour company can bring to the bay to six and introduced admission fees and a mandatory educational video in 1995, reducing the number of visitors by about 20 percent over a decade – is considered a success.

Stakeholders like the DLNR are starting to fight fire with fire, managing the damage facilitated by social media with tech tools, says Dennison: "We're working with a couple of vendors to come up with a system to monitor social (media) based on keywords." They're also assigning a staffer to monitor metrics and respond accordingly, by shutting down unpermitted raves and parties and insisting that posts depicting illegal behavior be taken down. "I'd say we've been moderately aggressive in attacking it, and we're about to get highly aggressive," says Dennison.

"At the end of the day, you can't keep people out. And if you're not charging the proper price to mitigate congestion, then it's not their fault. It's your fault."

Paul Brewbaker, Economist, TZ Economics

Visitor behavior can also be strongly influenced through education, says Bolan. Many visitors to Hawaii are not only coming for sun, sand and surf, which they can often get cheaper and closer to home; they're coming for authentic culture and nature. "(Visitors) are not going to get upset if they're given information like, 'Welcome to Hawaii; it's a special place, a sensitive destination culturally and environmentally, and these are the things we want you to know,'" says Bolan. Opportunities to educate start on the plane, which Bolan calls "a huge advantage" over other destinations: "I can't drive to Hawaii. I have to be on that plane, and I'm given a form; it's a chance to educate me." Other opportunities happen at hotel check-ins, and even at the sites themselves, where the DLNR has been installing signs since 2015 with scannable QR (quick response) codes at sensitive locations to provide warnings and information.

One straightforward way to make sure tourism's costs are factored into maintenance and management is to charge for open-access resources, as is already done at Hanauma Bay and Diamond Head. High operation costs and challenges with policing boundaries could at least in part be overcome with technology, says Brewbaker: "I'm oversimplifying, but surely there's an app for that." Two of many examples across the nation already in place: FastToll, the mobile app-based toll road system in Illinois, and the mobile app to pay for entry now being piloted at Joshua Tree National Park in California.

"The tourists will still come, but at least some form of compensation has been designed so that the decision they're making to go down to rent a kayak in Kailua Beach and paddle up to the Mokuluas and look at the bird sanctuary, is undertaken with an explicit cost associated with the use of a public, recreational open-access resource," says Brewbaker. "Everywhere else charges. Only Hawai'i doesn't."

ANNUAL VISITOR SPENDING IN BILLIONS OF ADJUSTED DOLLARS: Visitor spending, when adjusted for inflation and expressed in constant 2016 dollars, represents a strong recovery from the Great Recession, but has never reached late-1980s peaks.

(Source: data.uhero.hawaii.edu/#/series?id=164719&sa=true)

And the fees shouldn't necessarily stop at individual users. Brewbaker says that tour operators who conduct their business by relying heavily on open-access resources should also pay to play: "'Oh, but it's a public park?' That's not public, it's a private, commercial enterprise. It's not me taking my family. Why is it not obvious that a private, commercial user for a public recreational resource should be paying for the right to use that resource? At the end of the day, you can't keep people out. And if you're not charging the proper price to mitigate congestion, then it's not their fault. It's your fault." After that, the thing to do, says UHERO's Bonham is to make sure the revenue generated is used to restore and create resilience in the resources being depleted, which he says has not recently been the case, at least for public infrastructure. "It's one thing if you have a robust visitor industry that is generating tax revenue, as it is, and you're spending a share of that revenue to maintain that natural environment and maintain the facilities – the airport, parks, roads, everything. That's as it should be. But we don't seem to be able to do that," says Bonham. "I have a hard time thinking of any beach park bathroom facility in the whole state that I've ever been in, in 30 years of living here, that I would say is acceptable. When you compare those facilities to facilities in other states, it's really mind blowing."

Another possibility is to take advantage of underutilized capacity by encouraging more tourism on the Neighbor Islands, a strategy that is rolling out now, with most of United Airlines' 400,000 additional Hawaii air seats being direct from the Mainland to the Neighbor Islands. Hawaii Island and Kauai are projected to increase their air capacity by more than 20 percent during November 2017 to January 2018, over the same period a year ago, moves that Szigeti says will lead to "a little more balance between all the islands – that balance is really important." He acknowledges that balance also needs to come with a real conversation about the increased stress placed upon environment, infrastructure and residents on those islands.

In the long term, if Hawaii is to be a resilient destination, a wider view of the costs and benefits of tourism is needed, says Bolan. "There are the traditional numbers: 'How many come? How long do they stay? How much do they spend?' But how much (money) is staying local? How widely is it being distributed? How is it being invested? And at the same time, what is the true negative impact? Travel and tourism are fun, but there is also coastal erosion and waste and water and social impact."

That increased scope of information needs to come in a usable form, he continues:

"There's no line on the profit/loss statement that says, 'I paid \$5 to the ocean because I went kayaking,' since I might have put sunscreen in there. If you can't quantify the negative of what you're doing, no one's going to pay for it. We need to use data to persuade parties to do a better job."

Getting the right data by asking the right questions is tough but important, agrees Mak. "You trace the tourism dollars and find out who gets what. It's not easy, but it's doable. Even if we do get ballpark estimates or ideas about ... the people who are left behind by all of this, we can find ways to improve the distribution of the benefits of tourism."

And then we need to ask the big question, says Bolan: "What does Hawaii want to become?" We think of ourselves as a mature tourism destination, but the reality is always changing, and our models and approaches must change along with it.

For that, says Szigeti, a multi-stakeholder dialogue is necessary. HTA gets the brunt of tourism complaints, but there's only so much it can do, he says: "One person, one entity, one group is not going to have an answer to all these challenges. It's going to be everyone having to come together. And that's going to take time."

## We're All Tourists Now

**Something Atladóttir said** that stuck with me was that in a world where travel is considered a standard part of life, which she called "the biggest societal change since the industrial revolution," each of us plays every role. We will all, at some point, be the residents rubbed the wrong way by visitor incursions, but we will also, at other points, be those visitors ourselves.

So this is less a tourists vs. residents scenario, than a win-win, or lose-lose, situation – and if Hawaii can get it right, everyone will benefit. The upsides to well-managed tourism are enormous, said Atladóttir: "We just have to figure out where we are, where we want to be and how we are going to get there."

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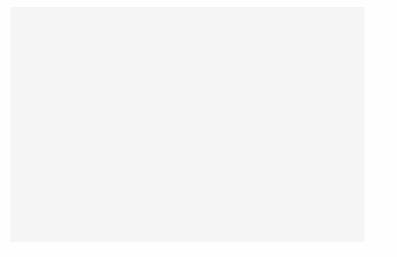
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