



# **KAUA'I TOURISM STRATEGIC PLAN 2019 - 2021**

## **REFOCUSING TOURISM TO FIND BALANCE**



*SUPPORTED BY*

- **County of Kaua'i**
- **Hawai'i Lodging and Tourism Association-Kaua'i**
- **Kaua'i Visitors Bureau**

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For the period July 1, 2018 to June 30, 2021



**August 2018**

*Supported by*

**County of Kaua'i  
Hawai'i Lodging and Tourism Association-Kaua'i  
Kaua'i Visitors Bureau**

*Prepared by*

**Diane Zachary, Consultant**

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Message from  
Mayor Bernard P. Carvalho Jr.



Aloha!

As early as 1896, tourism promotions referred to Kaua'i as the "Garden Island" for its natural beauty, and stories of the hospitality of its native inhabitants and their unique spirit of aloha. The Hawai'i Visitors Bureau reported that in 1929, Kaua'i – with a population of nearly 36,000 – received 1,415 visitors, far behind O'ahu, Maui and Hawai'i Island.

The emergence of interisland flights in the early 1930s augmented steamship travel and opened the door to tourism on a larger scale. In 2000, the island's last sugar cane company closed, leaving tourism as the primary industry driving Kaua'i's economy with 1.075 million visitors annually and a population of 58,563. National and international tourism marketing, as well as the beautiful images of Kaua'i shown in major films produced on the island, have been successful at continuing to attract visitors.

Now, nearly 20 years later, visitors continue to be drawn to Kaua'i. While this has created a valuable economic sector for Kaua'i, tourism's success is straining the patience of residents and the island's environment and infrastructure. It is our kuleana, our responsibility, to continue to create a viable economy for our people while maintaining all that makes Kaua'i unique and special.

I want to thank the Steering Committee and all those that have contributed to this plan. This is a bold effort on behalf of the visitor industry to protect our island home while still providing a strong base economy by focusing efforts on urging and assisting in management of the visitor industry.

The Kaua'i Tourism Strategic Plan 2019-2021 (KTSP), has been prepared to offer direction for the visitor industry and partnering agencies and organizations to ensure tourism remains a vital, competitive, and sustainable part of Kaua'i's economy, providing a positive benefit to residents and visitors alike.

I look forward to and welcome the continued efforts by the stakeholders in their action committees, to bring life to the Kaua'i County Tourism Strategic Plan 2019-2021: Refocusing Tourism to Find Balance.

Me Ke Aloha Pumehana,

Bernard P. Carvalho Jr.  
Mayor, County of Kaua'i

## ACKNOWLEDGEMENTS

This plan was created with the active participation of dozens of people all committed to the belief that Kaua'i is a special, unique place to be honored and cared for, even as we welcome visitors to the island to contribute to the economy. I am appreciative of their thoughtful analysis of the issues our island faces and their willingness to think boldly. They recognize clearly that tourism growth cannot outweigh the best interests of the environment and our residents; a balance is needed.

Sincere thanks are extended to all members of the Steering Committee and priority strategy committees for their dedication in time and effort during the many months it took to complete our research, analysis, discussion and planning. Serving on these committees was a volunteer commitment, in addition to their already full agenda. Special thanks to those leaders who took on the task of chairing a committee to keep things moving forward – Denise Wardlow, Ce Lucente and Candace Tabuchi.

Finalizing a document like this takes many hands. Many thanks to Katy Britzmann, Pamai Cano, Bob Crowell, Jeri Di Pietro, Lea Kaiaokamalie, Joy Miura-Koerte, Chris Moore, Michael Moule, Rayne Regush, Lee Steinmetz, Ben Sullivan, Candace Tabuchi, Jan TenBruggencate, Beth Tokioka and Anne Walton for their helpful feedback and assistance on the first draft.

Agency and community partnerships with the KTSP committees will be key to implementing this plan. I am appreciative of the help offered and look forward to your continued involvement in the three years ahead.

A warm mahalo to the funders of this project, County of Kaua'i Office of Economic Development, Hawai'i Lodging and Tourism Association-Kaua'i and Kaua'i Visitors Bureau. Special thanks to Mayor Bernard Carvalho and the Kaua'i County Council for recognizing the value of collaborative planning and action for Kaua'i tourism.

Finally and importantly, I am appreciative of OED's Nalani Brun and KVB's Sue Kanoho, who throughout this project offered vision, guidance, reality checks and a commitment to progress.

It has been my honor to be a part of this project.

Diane Zachary  
Consultant

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# EXECUTIVE SUMMARY

## Refocusing Tourism to Find Balance

In the past, the metrics for successful tourism have been economy-based: room occupancy, number of visitors, total expenditures of visitors, visitor industry contribution to government revenues and the local economy, and spending per visitor.

On Kaua'i, as in many world-class visitor destinations, times have changed. We are at a tipping point and the risk of overtourism<sup>1</sup> threatens the environment, quality of life and the visitor experience. While the economic metrics of tourism are still vital, “quality of life” metrics are now essential: quality of the visitor experience, impact of the visitor industry on local residents and the environment, and the quality of life of visitor industry employees. In order for the visitor industry to continue to thrive and be a positive contributor to our economy, it must also be a vital partner in contributing to the quality of life for Kaua'i residents and protecting our island's precious resources. This requires a “refocus” within the visitor industry and in its relationships and partnerships at the local and State levels. This *Kaua'i Tourism Strategic Plan* (KTSP) for July 2018 to June 2021 lays out the vision, goals, and actions to achieve this vital refocus.

## KTSP Planning Structure and Funding

Dozens of volunteer industry, government and community members participated in the development of this plan. The plan represents the commitment for a public-private collaboration to set a new course to better manage Kaua'i's tourism.

During planning, and in the upcoming implementation phase, a 3-member Executive Committee guides the KTSP project; a 24-member Steering Committee sets direction, makes decisions, coordinates actions and monitors progress; and each of the five committees is focused on a specific priority important to the success of the visitor industry. The strategic priority areas for FY2019-2021 are:

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<sup>1</sup> Overtourism describes destinations where hosts or guests, locals or visitors, feel that there are too many visitors and that the quality of life in the area or the quality of the experience has deteriorated unacceptably. The term began to be used in Summer 2017 when protests against tourism crowding took place in several European cities.

- ◆ Sustainable Tourism<sup>2</sup>
- ◆ Transport and Transit
- ◆ Natural and Cultural Environment
- ◆ Communications
- ◆ Employee Development

This plan is guided by international, state and local goals and considers tourism best practices in refocusing tourism.

Funding to support plan development was provided by:

- ◆ County of Kauaʻi through the Office of Economic Development (OED)
- ◆ Hawaiʻi Lodging and Tourism Association-Kauaʻi (HLTA)
- ◆ Kauaʻi Visitors Bureau (KVB)

The plan is intended to be a dynamic document that can be revised and updated as needed. It includes a vision and goal for Kauaʻi's tourism future and sets the direction for tourism for the next three years, coupled with strategies and actions toward that future. It includes measures of progress and the flexibility to adjust strategies and actions as the need arises to respond to new opportunities and unforeseen events.

#### KTSP Authority

It is important to note that this plan was created through a public-private collaboration that has no legal jurisdiction or authority. Its use is voluntary among the stakeholders involved in the plan's development and within the visitor industry in its implementation.

The importance and value of the plan and its implementation have been recognized within the industry and in the *Kauaʻi County General Plan 2018* (General Plan 2018). As a result of the work conducted to carry out the 2016-2018 tourism strategic plan, industry-government communication and cooperation have improved, issues have been discussed and tackled, and progress has been made and reported. However, the process has also shown that much more work remains.

## Tourism Today – and How We Got Here

Like many other destinations around the globe, the island's economy is heavily reliant on the success and sustainability of the visitor industry. Tourism on Kauaʻi supports about one-third of the island's economy and employs approximately 38% of the island's workforce. Tourism businesses also partner with the community through their donations of services, products and sponsorships.

In 2017, there were 1.277 million visitor arrivals by air to Kauaʻi, staying on average 7.51 days. In addition, there were 214,500 cruise ship arrivals. The average daily visitor census (ADVC) was 26,267. Visitor expenditures on Kauaʻi totaled \$1.83 billion in 2017; the average visitor expenditure per day was \$191.00.

<sup>2</sup> Sustainable tourism seeks to minimize ecological and social-cultural impacts while providing economic benefits to local communities and host countries. (*Mohonk Agreement, 2000*)

Numbers for the first half of 2018 show an increase in visitor arrivals, spending and length of stay. The ADVC for the first six months of the year was 29,319, up from 26,513 for the same period in 2017. The highest month to date in 2018 was in June, when the island had a staggering ADVC of 33,368. Occupancy at visitor properties remains high.

Kaua'i visitors have changed in recent years. In the past, when visitors mostly traveled in tour groups, stayed in hotels and got around on tour buses with a set itinerary, the impacts did not feel as great as they do now. Today, most visitors are free independent travelers (FITs), often staying in vacation rentals within communities, traveling in cars they rent for their entire stay and searching for special, "undiscovered" places (often found on social media), including places they should not be. As a result, the impact of visitors feels much greater to the residents.

While tourism has provided valuable jobs, state and county tax revenues and helped support other opportunities, the current level of tourism has overstretched the resources and infrastructure of Kaua'i. At just 552 square miles and a 2017 population of 72,159,<sup>3</sup> on average in a given day one in three people on Kaua'i is a visitor. Over the past year there have been no major capacity improvements to the island's infrastructure. Experience has shown that the visitor and resident experience are both strained when the number exceeds approximately 25,000.

Resort, hotel properties and vacation rentals account for 41 percent of the total County's real property tax collected, making it an important local revenue source. In 2017, Kaua'i had 8,821 recorded visitor units. That number could expand by 3,000 if all the units already in the County pipeline are built and no new permits are granted (a 34% increase). Assuming the typical two or three visitors per unit, this could potentially increase the ADVC to an untenable number.

Recent experience has shown that a daily visitor count that exceeds an average of about 25,000 per day strains the current infrastructure and increases resident frustration. That number has been far exceeded over the past couple of years. It is clear that the status quo for Kaua'i tourism cannot continue. Bold action must be taken to better manage tourism to protect the environment and residents' quality of life.

## Kaua'i's Tourism Values

Kaua'i's visitor industry is fortunate to be able to draw on so many unique and special aspects of the island. To support this uniqueness, our values for tourism on Kaua'i are to:

- Honor the island's people and heritage
- Support and enhance the quality of life for residents
- Value and perpetuate the island's natural and cultural resources
- Engender mutual respect and partnership among all stakeholders

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<sup>3</sup> U.S. Census Bureau, American Fact Finder

- Support a vital and sustainable economy
- Provide a unique, memorable and enriching visitor experience

## 2040 Vision for Tourism

The tourism actions taken today will have lasting impacts on the future. If we have a clear vision of that future, we can be guided by it in creating actions to take now.

**In our vision of tourism in 2040**, Kaua'i is a global leader in the reinvention of the visitor industry. Collaborative action by community stakeholders has addressed unsustainable visitor growth as well as climate change and social inequity. Tourism remains a valued economic sector, as other sectors have emerged to offer greater stability and opportunity for the island.

*Transportation:* The importance of the transport shift to a multi-modal system can't be overstated, as it has transformed every aspect of island life. Tourism and the broader economy have been decoupled from the single occupancy vehicle. Only 30% of visitors rent cars for their entire stay. Shuttles take visitors and residents to primary destinations around the island. Electric vehicles, many of which are shared, have replaced gas and diesel cars. Bike shares abound. The coastal path has been extended in areas around the island, and both visitors and residents use the range of transportation innovations. Roads are less congested and safe for walking and biking.

*Housing:* Hotel properties have converted surplus parking areas, thanks to the transportation shift, into mixed-use developments. Many employees and their families enjoy living on-site and in nearby neighborhoods where affordable housing has been built. Denser, walkable towns reduce costs for residents, making their lives more affordable. Long distance commuting from home to work or shopping is rare. Short and long-term housing rentals are registered and regulations are enforced, offering a much clearer grasp of island capacity and better data for decision-making.

*Sustainable Practices:* Tourism-related businesses, along with the community, implement measures to conserve resources and protect the environment. Food, products and services are locally sourced. Waste is reduced, organic waste is managed on-site where possible, recycling is seamless; all this reduces solid waste production for the larger community. Wide use of greywater has the triple benefits of reducing water consumption, reducing wastewater loads, and supplying lower cost irrigation water.

*Climate Change:* Visitors offset their aviation emissions by volunteering or financially supporting projects benefiting local communities, such as improving the health of the island's watersheds. Government and visitor industry leaders work together to support building and zoning policies that anticipate and respond to climate change and sea level rise, ensuring public safety.

*Cultural, Recreation and Rejuvenation Spaces:* Kauaʻi has developed place-based resource management systems and practices to control capacity, access and conservation. Innovative funding mechanisms have helped establish and maintain healthy and vibrant beaches, parks, trails and public spaces for active and passive use. Cultural sites are protected and preserved to help educate and inspire us. Users consider themselves co-stewards of these unique spaces.

*Visitor Experience:* Visitors continue to come to Kauaʻi from around the world to enjoy longer, extended vacations on a green island that has integrated culture and natural resource management into everyday life. They conduct themselves with respect and appreciation for the cultural and natural environment. They follow the controls put in place in areas of high cultural or ecological value with the understanding that it will benefit their experience as a visitor. Well-trained employees offer renowned customer service. Our community works to maintain balance in visitor arrivals to ensure positive experiences for visitors and residents alike. Managed access at popular destinations is a win-win for all.

*The Inspiration:* Achieving this vision would not have been possible without the inspiration and traditions of our Hawaiian culture, which gifted us with a holistic and inclusive approach to problem solving. Kauaʻi continues to draw on the aloha spirit of its residents and its natural beauty. Residents view tourism as a valued partner in and contributor to the community.

## KTSP Goal for 2019-2021

Guiding this plan is the following Kauaʻi visitor industry goal:

**Our goal** is to refocus tourism to responsibly manage the economic activity of Kauaʻi tourism in a sustainable manner while creating memorable experiences for visitors, improving quality of life for residents and ensuring the stewardship of our natural and cultural resources.

## The Visitor Kauaʻi Wants to Attract

Visitors select destinations that meet their interests and travel style. Kauaʻi may not be the ideal destination for everyone. In general, the visitors Kauaʻi hopes to attract will be:

- ◆ Free independent travelers (FIT)<sup>4</sup>
- ◆ A mix of new and returning visitors
- ◆ Families
- ◆ From all income levels
- ◆ Interested in culture and heritage
- ◆ Those who enjoy new experiences
- ◆ Nature lovers
- ◆ Ecotourists who respect the environment
- ◆ Those who want to enjoy outdoor activities, such as hiking, kayaking, ziplining, ATV tours, golf, etc.
- ◆ Celebrating romance

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<sup>4</sup> An individual or small group traveling and vacationing with a self-booked itinerary

## Broad Tourism Objectives 2019-2021

Kaua'i's first tourism strategic plan from 2006 laid out seven broad objectives. Those objectives remain relevant and guide this new plan.

1. Make positive contributions to the quality of life for residents.
2. Collaborate with stakeholders and decision-makers to find a balance to manage visitor impacts on Kaua'i.
3. Increase the economic contribution of the visitor industry to Kaua'i.
4. Increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.
5. Maintain and improve visitor satisfaction with their experience on Kaua'i.
6. Reinforce authentic Native Hawaiian culture and local Kaua'i culture, the foundations of our unique sense of place.
7. Contribute to the preservation and enhancement of the natural resources on Kaua'i, including land and ocean.

## Taking Action: Priority Strategies for 2019-2021

A myriad of tourism issues and trends were identified in the planning process. They demonstrate there are many possible priority areas of focus for the island's visitor industry. However, taking action on all these areas is constrained by available funding, volunteer committees and their available time, and lack of full-time staffing. Five key areas were selected that will play an important role in refocusing tourism over the next three years. The strategies related to these priorities and the actions that will be undertaken are summarized below. The action plan for each strategy, including specific actions, the partners involved, timelines and measures of success, can be found starting on page 43. Additional priorities can be addressed as circumstances change during the course of this plan or in future plans.

### **PRIORITY STRATEGY: SUSTAINABLE TOURISM**

Develop the systems, processes, supports, regulations and partnerships needed to support Kaua'i as a green island that sustainably integrates tourism as an important contributor to the quality of life of residents and offers a satisfying and unique experience for visitors.

#### **ACTIONS**

1. Partner with other counties, agencies, elected representatives and organizations to establish the County's authority to have a role in decisions regarding the number of flights and air seats coming to Kaua'i.
2. Support the County administration in its efforts to reduce or restrict the number of new visitor units for projects that have received entitlements and approvals but are not yet under construction.
3. Encourage expanded use of sustainability practices among tourism-related businesses to support a green island.
4. Advocate for funding to engage experts in tourism management and overtourism strategies to keep pace with industry best practices and guide long-range decision-making.
5. Participate in and support the County's development of a collaborative waste management strategy for the visitor industry that focuses on management of organic waste and waste reduction over 'universal recycling'.
6. Participate in developing reporting standards and greenhouse gas (GHG) emissions targets within the local visitor industry that align with goals in the Kaua'i General Plan 2018.
7. Advocate for government regulations that: 1) strictly enforce regulations for all alternate accommodations and institute strong penalties for non-compliance, 2) only allow new alternate accommodations within the VDAs in compliance with zoning and density requirements, 3) as accommodations in non-VDA areas change hands, the "alternate accommodation" status expires and is no longer entitled as part of property ownership, and 4) explore creating new regulations to disincentivize the purchase and use of properties as transient vacation units, such as limiting the number of days per year that a property may be rented for transient vacation use.

### **PRIORITY STRATEGY: TRAFFIC AND TRANSIT**

Support a comprehensive multi-modal land transportation system for residents and visitors that integrates community planning, street design, traffic management, shuttle and transit services, and bicycle and pedestrian travel, in order to reduce traffic congestion, improve safety and provide mobility as a seamless service.

#### **ACTIONS**

1. Educate the visitor industry on its role in implementing the comprehensive multi-modal transportation system as outlined in the Kaua'i General Plan and the Short Range Transit Plan (SRTP), and secure broad visitor industry support for the vision.
2. Catalyze innovative solutions, such as rideshare, carshare and bikeshare, to dovetail with the Kaua'i General Plan and Short Range Transit Plan.
3. Support funding and implementation of the North Shore Shuttle as recommended in the SRTP, and coordinate with implementation of the Hā'ena State Park Master Plan.
4. Participate in researching the use of business improvement districts to fund multi-modal transportation solutions and other improvements, including resort area shuttles and shuttles from the airport to resort areas.
5. Engage the Po'ipū community and resorts in Po'ipū Road design, parking needs and possible support of landscape maintenance.
6. Support completion of the Kapa'a Transportation Solutions priority projects as outlined in the Kaua'i General Plan.
7. Support completion of a shared use lane or path linking Nāwiliwili Harbor with Rice Street.

### **PRIORITY STRATEGY: NATURAL AND CULTURAL ENVIRONMENT**

Sustainably manage and maintain parks and trails for the safe and responsible enjoyment of residents and visitors.

#### **ACTIONS**

1. Strongly encourage agencies and groups responsible for Kaua'i's highly sensitive cultural and natural resources to adopt a management framework, with community participation, to determine appropriate site capacity and the conservation, preservation and mitigation measures needed to ensure the long-term sustainability of the resource and the enjoyment of users.
2. Work with elected officials to develop dedicated funding to support the long-term maintenance and improvement of infrastructure, parks, trails and cultural sites for the benefit of residents and visitors.



3. Support DLNR State Park Division’s initiation of adaptive management<sup>5</sup> for State park and trail resources, which may include placing limits or restrictions to protect the resource.
4. Encourage revenue generation for ongoing park improvement and maintenance: generate income through fees for out-of-state visitors, grants and voluntary donations and institute a payment system for commercial users to access specified areas as a way to fund improvements and maintenance and to control access to these areas.
5. Advocate for funding for the Hā’ena and Kōke’ē State Park master plans and support implementation of the plans.
6. Support the update of the Nāpali Coast Management plan.
7. Participate in improving messaging and visitor education on natural resource conservation and interpretation by: updating trail maps, installing trail markers, placing kiosks at trailheads with safety tips, map and interpretive information; using innovative digital methods to share information and messages with users; and encourage visitor guides, boat operators and other tourism providers to present information that increases visitor understanding of Kaua’i’s unique cultural and natural environment.
8. Consider new areas to expand parks and trails use to mitigate overcrowding and resource degradation.

**PRIORITY STRATEGY: EMPLOYEE DEVELOPMENT**

Support career exploration and preparation programs that attract new workers to the visitor industry and provide career development opportunities for current visitor industry staff to ensure an available, well-qualified workforce.

**ACTIONS**

1. Support KPAA/Keiki to Career’s “Career Connection” program for high school students and encourage visitor industry employers to participate.
2. Update the flyer of training opportunities for new and current workers and options for funding to support worker training.
3. Support KCC’s Hospitality and Tourism (HOST) program, including the Prior Learning Assessment (PLA) and Early College programs.
4. Continue to support the annual Lead, Expose and Inspire (LEI) program for high school juniors and seniors.
5. Explore the advisability of requiring certifications for specific positions in Hawai’i, such as tour guide certification, and certification of professional development in customer service.

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<sup>5</sup> Adaptive management incorporates research into conservation action. Specifically, it is the integration of design, management, and monitoring to systematically test assumptions in order to adapt and learn.

### **PRIORITY STRATEGY: COMMUNICATIONS**

Utilize effective communications with all visitor industry stakeholders – including visitors, residents, elected officials and the visitor industry at large – so all are informed and have opportunities for dialogue to minimize conflicts and improve tourism as a valuable economic contributor.

#### **ACTIONS**

1. Educate visitors before arrival through videos and social media, and after arrival through appropriate signage apps, tourism websites and well-informed visitor industry employees.
2. Keep residents informed of the role of the visitor industry in the community, solicit community input and maintain ongoing communications to solve problems and mitigate concerns, recognizing that tourism is a valuable economic contributor.
3. Educate elected officials and relevant agencies on the *Kaua'i Tourism Strategic Plan* and the long-range vision for Kaua'i tourism, secure their support and maintain ongoing communications on issues related to tourism and needed policies and regulations.
4. Educate the visitor industry, such as at tourism association and employee meetings or through webinars, about the *Kaua'i Tourism Strategic Plan* and enlist their support and assistance in its implementation.
5. Brief state and county agencies related to tourism about Kaua'i issues related to the industry, and enlist them as partners.
6. Create activities that bring all stakeholders (including community members, community groups and tourism leaders and staff) together to share updates, data and ideas on Kaua'i's visitor industry.

### **PRIORITY STRATEGY: PLAN IMPLEMENTATION**

Ensure successful plan implementation by coordinating meetings and communications of the Steering Committee and priority strategy committees, tracking progress on action plans, reporting progress and updating action plans when needed.

#### **ACTIONS**

1. Contract for services to facilitate and coordinate the work and communications of the Steering Committee and Priority Strategy Committees.
2. Convene meetings of the committees to discuss and implement the plan's recommendations; track progress on the action plans; and report annually on outcomes.

## MOVING FROM PLANS TO IMPLEMENTING ACTION

The *Kaua'i Tourism Strategic Plan* is intended to be dynamic, open to revision when needed. To ensure its successful implementation, there will also be a need to secure the involvement and broad support of elected officials, relevant agencies, the visitor industry at large and the community.

The success of this plan is limited only by the wisdom, understanding and commitment of those involved. It is now up to the visitor industry and their partners to embrace that challenge.

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# INTRODUCTION

## History of Tourism on Kauaʻi

It is believed Kauaʻi's earliest residents arrived aboard double-hulled voyaging canoes around 900 A.D. although their arrival date is still under discussion. Their Polynesian culture was similar to that in Tahiti, the Cook Islands, the Tuamotus, the Marquesas and other islands of eastern Polynesia, all of which were inhabited within a few hundred years of each other. Kauaʻi was already well settled, with local populations established in several localities, by 1200 A.D. The Hawaiians were skilled at farming and fishing. They had developed a complex culture led by chiefs. The quality of their material culture— carvings, canoes and tools, weaving and cloth making – were unmatched. Although there are several reports of earlier European contacts, the arrival in 1778 of Captain James Cook introduced the Hawaiian Islands to the Western world. Cook's first steps on Hawaiian soil were at Waimea on Kauaʻi, and he was able to converse with them in the language he and his crew had learned in Tahiti.

Whalers and missionaries began arriving in the 1820s and early in the 19<sup>th</sup> century an economic evolution surged, based on producing food to supply the whaling ships and the pineapple and sugar cane industries for export. This new economy was supported by an influx of immigrants to work the fields. Whaling ended by 1846. Tourism began as early as 1885 when steamships replaced slower and less reliable sailing vessels. That year, a one-week tour to Kauaʻi via steamship from Honolulu was offered for \$50.

As early as 1896, tourism promotions referred to Kauaʻi as the “garden island” for its natural beauty, “unrivaled scenic attractions,” and stories of the hospitality of its native inhabitants and their unique spirit of aloha. The sugar industry supported an increase in steamship travel between the islands and tourism began increasing in the 1920s. The Hawaiʻi Visitors Bureau reported that in 1929 Kauaʻi, with a population of nearly 36,000, received 1,415 visitors, far behind Oʻahu and Hawaiʻi Island.

The emergence of interisland flights in the early 1930s augmented steamship travel and opened the door to tourism on a larger scale. In 1937, Kauaʻi had 92 hotel rooms. Kauaʻi's pineapple industry lasted until the 1960s. In 2000, the island's last sugar cane company closed, leaving tourism as the primary industry driving Kauaʻi's economy with 1.075 million visitors annually and a population of 58,563. National and international tourism marketing, as well as the beautiful images of Kauaʻi shown in major films shot on the island, have been successful at continuing to attract visitors.

## Kaua'i Tourism Strategic Planning – Background, Process and Purpose

Visitors continue to be drawn to Kaua'i for its beautiful environment, casual lifestyle, rich Hawaiian culture and outdoor activities. While this has created a valuable economic sector for Kaua'i, tourism's success is straining the patience of residents and the island's environment and infrastructure. This document, the *Kaua'i Tourism Strategic Plan 2019-2021 (KTSP)*, has been prepared to offer direction for the visitor industry and partnering agencies and organizations to ensure tourism remains a vital, competitive, and sustainable part of Kaua'i's economy, providing a positive benefit to residents and visitors alike.

### KTSP 2006-2015

The *Kaua'i County Tourism Strategic Plan 2006-2015*, developed in 2005 and 2006 and funded by the Hawai'i Tourism Authority, was the first effort to look comprehensively and strategically at the visitor industry on the island. The plan looked ahead ten years and laid out a series of strategies and actions to be undertaken. It reflected the collective feedback and input of island residents, the visitor industry, state and county governments, cultural organizations, educational institutions, others in the public and private sectors. Additionally, it considered numerous plans, like the 2000 Kaua'i General Plan, news articles, reports, data, research, and other related information in the development of that plan.

Implementation of the first plan lagged when facilitation funding ended after the first year. No one agency or individual was tasked with ensuring the plan's progress. In addition, the 2008 recession showed that a 10-year planning cycle was too long. The recession caused a dramatic drop in the number of visitors to Kaua'i; it took several years for the numbers to return to pre-recession levels. Tourism is dynamic and sometimes volatile, subject to political, economic and natural events and for this reason, a 10-year strategic planning cycle proved unworkable.

### KTSP 2016-2018

The next plan, completed in 2015, had a more realistic three-year time frame to be responsive to current and emerging conditions. The *Kaua'i County Tourism Strategic Plan Update 2016-2018*, which covered three fiscal years, July 1, 2015 to June 30, 2018, worked within the same set of seven primary objectives from the 2006-2015 plan and identified actions to be carried out by six volunteer committees, under the guidance of a 24-person Steering Committee composed of visitor industry stakeholders representing lodging, activities, services, transportation, business associations and government agencies. A few highlights of outcomes during this period include:

- ◆ greater cooperation, coordination and communication with state agencies and related business and nonprofit groups toward common objectives
- ◆ greater promotion and use of Kaua'i Made and Kaua'i Grown products within the visitor industry
- ◆ support for and successful County Council passage of a one-half percent increase in the general excise tax on Kaua'i for road improvements

- ◆ support for and approval by the Hawai'i Board of Land and Natural Resources of the Ha'ena State Park Master Plan
- ◆ support for Tour Guide Certification and Customer Service training, offered by Kaua'i Community College OCET, in cooperation with Kaua'i Chamber of Commerce
- ◆ building support for establishing resort shuttles as part of the County's multi-modal transportation system
- ◆ advocated for funding for road improvements in congested areas and additional staffing for Kaua'i's State parks

A part-time facilitator was contracted to coordinate committees meetings and reporting. Organizers had to be creative to fund the plan's preparation and implementation – ARDA-Hawai'i, the County of Kaua'i (CoK), Hawai'i Lodging and Tourism Association-Kaua'i (HLTA), Kaua'i Visitors Bureau (KVB) and Royal Coconut Coast Association (RCCA) contributed to one or more years of that tourism strategic plan.

## KTSP 2019-2021

**New Plan Development.** This document contains plans for the fiscal years 2019 through 2021. Visitor industry leaders realize Kaua'i is at a tipping point. The island risks being a victim of overtourism,<sup>6</sup> leading to negative environmental impacts, serious dissatisfaction in the community, traffic congestion, insufficient infrastructure, crowded parks, diminished visitor experience and homes used for vacation rentals rather than housing for residents. Unless bold action to change course and better manage tourism is taken in the next three years, the health of the environment, the visitor industry's relationship with the community, the visitor experience and the tourism industry all risk serious deterioration.

The island and its people are at the heart of what Kaua'i's visitor industry has to offer. It is time to refocus tourism so there is a better balance so it can remain a valued contributor to the island without overwhelming the environment, facilities, infrastructure and residents' patience.

Lead officials of the County of Kaua'i and Kaua'i Visitors Bureau serve on an Executive Committee to guide the KTSP project. This small group secures funds for planning and implementation and provides general oversight.

The planning structure also includes a Steering Committee and five committees, each focused on a specific priority important to the success of the visitor industry. The strategic priority areas for FY2019-2021 are:

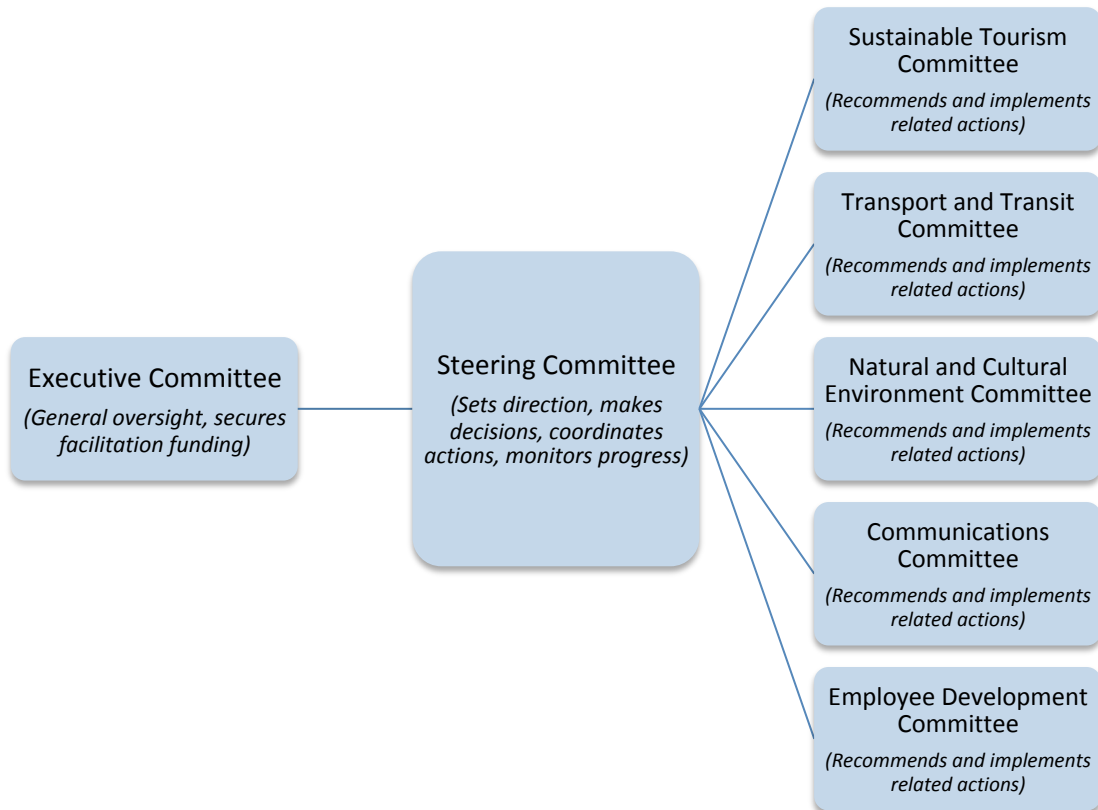
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<sup>6</sup> Overtourism describes destinations where hosts or guests, locals or visitors, feel that there are too many visitors and that the quality of life in the area or the quality of the experience has deteriorated unacceptably. The term began to be used in Summer 2017 when protests against tourism crowding took place in several European cities.

- ◆ Sustainable Tourism<sup>7</sup>
- ◆ Transport and Transit
- ◆ Natural and Cultural Environment
- ◆ Communications
- ◆ Employee Development

Figure 1 offers a structural overview of the planning and implementation groups.

**Figure 1. KTSP Planning and Implementing Structure**



The volunteer committees shown on the right above are charged with reviewing and researching the issues within a specific priority area, determining a strategy for the next three years and the action plan needed to carry out the strategy. They identify the specific actions and partners needed, a timeline and measures of progress. These same groups are tasked with implementing the action plan during the three-year period of the plan. Committees include representatives of the Steering Committee along with industry, government and community members with expertise in the topic.

The draft action plans from the committees have been presented to and approved by the Steering Committee, which provides overall guidance and has decision-making responsibility for the KTSP. This group is composed of representatives from hotels and timeshares, activity and

<sup>7</sup> Tourism that seeks to minimize ecological and social-cultural impacts while providing economic benefits to local communities and host countries. (*Mohonk Agreement, 2000*)



transportation companies, resort and business associations, nonprofits and government agencies.

The Steering Committee collaborates to:

- ◆ set a vision and goal for Kauaʻi’s tourism future
- ◆ consider relevant state and county plans and goals in developing Kauaʻi’s tourism plan
- ◆ determine strategies and actions needed to advance tourism in line with the vision and goal
- ◆ communicate with, educate and build partnerships with stakeholders and decision-makers, including County administration, County Council, state and federal legislators, county and state agencies and community groups
- ◆ recommend needed policy or regulatory changes
- ◆ suggest new programs that may be needed
- ◆ advocate for needed legislation and enforcement action

See Appendix A for a list of Steering Committee and other committee members.

During development of the plan, community and neighborhood associations were invited to send representatives to three focus group sessions, held in February, May and August 2018, to provide input. This proved valuable in creating a plan that considered the needs and wisdom of the community related to the role of tourism in the community, issues around tourism, and their feedback on proposed actions. Appendix B lists the community association participants.

### Funding for KTSP 2019-2021

Three partners provided funds to contract for a facilitator to coordinate and document the planning meetings and prepare the new plan for 2019-2021:

- ◆ County of Kauaʻi through the Office of Economic Development (OED)
- ◆ Hawaiʻi Lodging and Tourism Association-Kauaʻi (HLTA)
- ◆ Kauaʻi Visitors Bureau (KVB)

The plan is intended to be a dynamic document that can be revised and updated as needed. It includes a vision and goal for Kauaʻi’s tourism future and sets the direction for tourism for the next three years, coupled with strategies and actions toward that future. It includes measures of progress and the flexibility to adjust strategies and actions as the need arises to respond to new opportunities and unforeseen events.

#### **KTSP Authority**

It is important to note that this plan was created through a public-private collaboration that has no legal jurisdiction or authority. Its use is voluntary among the stakeholders involved in the plan’s development and within the visitor industry in its implementation. The importance and value of the plan and its implementation have been recognized within the industry and in the *Kauaʻi County General Plan 2018*.

## Goals and Initiatives that Guide Planning

Tourism takes place within a global, national, statewide and local context. All of these have been considered in the creation of this plan.

### United Nations Sustainable Development Goals

The United Nations has developed a set of Sustainable Development Goals intended to foster an understanding of development issues and help guide national planning. The *Kaua'i Tourism Strategic Plan 2019-2021* is based on a consideration of how it can provide a quality visitor experience while partnering as an industry to contribute to these important international goals.

**Figure 2. United Nations Global Goals for Sustainable Development**



### State and County Sustainability Goals

This plan will also contribute to the sustainability goals our State and County have set and directions outlined in the *Kaua'i County General Plan Update 2018*. These goals include:<sup>8</sup>

- ◆ 26-28% reduction in greenhouse gas (GHG) emissions by 2025 relative to a 2005 baseline (General Plan 2018)
- ◆ 80% reduction in GHG emissions by 2050 relative to a 2005 baseline (General Plan 2018)
- ◆ 100% renewable energy by 2045 (per State law – applies to KIUC)
- ◆ 100% renewable ground transportation by 2045 (Mayoral commitment from December 2017, reaffirmed in General Plan 2018)

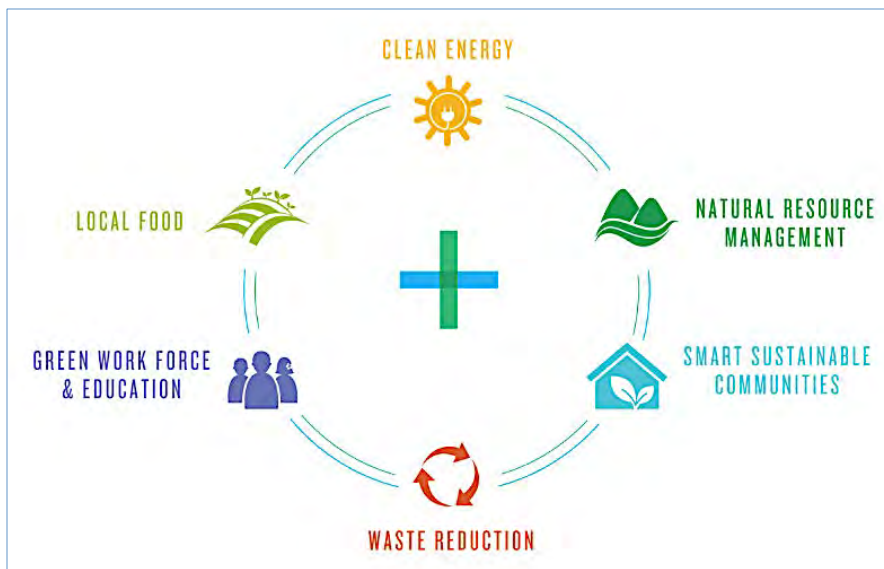
<sup>8</sup> Goal summary provided in email communication from Ben Sullivan, County of Kaua'i Sustainability Coordinator, July 30, 2018

- ◆ 100% renewable County fleet by 2035 (Mayoral commitment, reaffirmed in the General Plan 2018)
- ◆ Carbon neutral Hawai'i by 2045 (Statewide goal – HB 2182)
- ◆ 30% reduction in electricity use within County operations by 2023 (County Operations Sustainability Plan)

### Aloha+ Challenge

To help measure progress toward these goals, the KTSP will draw on the data of the State's Aloha+ Challenge dashboard as indicators of our success. This dashboard includes measures of progress in six key areas of sustainability, including clean energy, natural resource management, smart sustainable communities, waste reduction, green workforce and education, and local food. The visitor industry has a role to play in each of these key areas.

**Figure 3. Aloha+ Challenge Dashboard**



### Hawai'i Tourism Authority Strategic Plan 2016 (HTASP)

"The purpose of the HTASP is to guide the organization in addressing issues and creating opportunities that will move Hawai'i's visitor industry forward. As stated, this is HTA's strategic plan. It presents four goals that the HTA intends to accomplish by working and collaborating with partners and stakeholders. It is the kuleana of the HTA to drive demand to Hawai'i; deliver on the Hawai'i brand promise and experience; and continue to respect our Native Hawaiian culture and mālama Hawai'i and its people."<sup>9</sup> The Kaua'i TSP was developed with an awareness of and general alignment with the strategic direction set by HTA. The HTA plan establishes four goals to accomplish by working and collaborating with partners and stakeholders. Those goals are presented here in summary.

<sup>9</sup> Hawai'i Tourism Authority Five-Year Strategic Plan 2016, p. 5.

- ◆ Improve integrity of the destination
- ◆ Ensure stable economic benefits
- ◆ Elevate Hawai'i's value perception
- ◆ Strengthen HTA's reputation

The KTSP Steering Committee agrees with Hawai'i Tourism Authority (HTA) that successful tourism requires more than marketing; it takes ongoing, careful management, cooperation and a determination to make improvements in this important industry.

## Kaua'i County General Plan 2018

In February 2018, the County Council approved a new *Kaua'i County General Plan 2018* that provides local government policy direction to the year 2035. This comprehensive document offers: a vision for the future; an analysis of future land use, land use designations and community planning; recommended policies; recommended actions by sector (including the watershed, housing, land transportation, critical infrastructure, shared spaces, the economy, heritage resources, energy sustainability and climate change mitigation, public safety and hazards resiliency, and opportunity and health for all); and guidelines for implementing the plan and monitoring progress. In the Kaua'i General Plan, the tourism sector is included in the Economy section (p. 160-166) and in Appendix H – Issues and Opportunities (p. 481-484).

## TOURISM TODAY – AND HOW WE GOT HERE

Around the globe tourism is increasing at record rates due to a growing population and middle class, availability of cheaper flights, destination promotions through travel writing and social media, and more lodging opportunities as apartments and homes are made available as vacation rentals to augment more traditional hotels stays. The United Nations World Tourism Organization reports there were 25 million international tourists in 1950. That number skyrocketed to 1.3 billion in 2017; in 2030 it is projected there will be 1.7 billion international tourists, an average 3.3% annual growth.

Tourism today continues to be important to Kaua'i, supporting about one-third of the island's economy and employing approximately 38% of the island's workforce (DLIR, 2016). Visitor expenditures totaled \$1.8 billion in 2017. The island's economy is heavily reliant on the success and sustainability of the visitor industry.

The visitor industry partners with and contributes to the community in other valuable ways. Kaua'i's annual Visitor Industry Charity Walk raises money for grants to nonprofits; \$363,000 was raised at the May 2018 event. In a 2017 survey of Kaua'i tourism businesses, with not all participating, it was reported that these businesses donated over \$1 million in services, room

nights, items and sponsorships to nonprofits and groups to support their activities. Tourism employees donated more than 3,000 hours to community projects.

## Visitor Statistics

All visitors arrive on Kauaʻi at the domestic airport located in Līhuʻe via an interisland or direct flight from the U.S. mainland. The length of Kauaʻi’s runway limits the size of planes that can land. With the approval of the Federal Aeronautics Administration (FAA), several airlines have recently increased the number of flights to Kauaʻi and new airlines have started routes. For example, Southwest Airlines is scheduled to begin flights to Kauaʻi in 2018. This increased seat capacity directly contributes to the increase in visitors to the island. A recent HTA report shows an increase of 15.8% in seats to Kauaʻi anticipated for the period July to September 2018.<sup>10</sup> Most international flights arrive in the state through Hawaiʻi’s international airports in Honolulu, Kahului and Kona; Kauaʻi receives international flights only seasonally from Canada.

In 2018 and projected for 2019 and 2020, the ship schedule at Nāwiliwili Harbor<sup>11</sup> includes from 2 to 4 large ships each week (maximum length 964’) plus 3 smaller ships each week (maximum length 365’). Generally only one ship weekly is scheduled to stay overnight (Thursday), though one week in early November 2019 two ships will have overnight stays, on Wednesday and Thursday. This schedule is subject to change.

Approximately one-third of Kauaʻi tourists are first-time visitors, while two-thirds are repeat visitors. The number of units in timeshare, condominiums, condo/hotel, as well as vacation rentals contributes to the high number of repeat visitors.

In 2017, there were 1.277 million visitor arrivals by air<sup>12</sup> to Kauaʻi, staying on average 7.51 days. In addition, there were 214,500 cruise ship arrivals. The average daily visitor census (ADVC) was 26,267. Visitor expenditures on Kauaʻi totaled \$1,831,500,000 in 2017; average visitor expenditure per day was \$191.00.

In comparison, Hawaiʻi Tourism Authority reported the following Kauaʻi year-to-date figures for January – June 2018:<sup>13</sup>

In the first half of 2018, visitor spending (+9.2% to \$1.04 billion) and arrivals (+11.5% to 698,375) both increased compared to the same period last year. In June, visitor spending

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<sup>10</sup> Hawaiʻi Tourism Authority, Seat Outlook July to September 2018

<sup>11</sup> Schedule provided by Robert Crowell, Harbors District Manager-Kauaʻi, Hawaiʻi Department of Transportation, Harbors Division, August 6, 2018

<sup>12</sup> According to the Kauaʻi County General Plan 2018 (p. 322), visitor arrivals are defined as “the total number of individuals arriving from domestic and international points of departure by air and sea during a calendar year. Their number includes men, women, and children visiting from all ten of Hawaiʻi’s major market areas (MMAs). Total visitor arrivals include both day-trippers and overnight or longer visitors. By convention, visitors staying for more than 365 days are considered temporary residents.”

<sup>13</sup> HTA Release (18-42) dated July 31, 2018

increased (+13.1% to \$195.3 million) bolstered by growth in total visitor days (+8.6%) and higher daily spending (+4.1% to \$195 per person). Visitor arrivals were up in June (+9.1% to 135,484) with more visitors from Japan (+55.7%), U.S. East (+10.8%), U.S. West (+7.1%) and Canada (+1.5%). The average daily census rose 8.6 percent to 33,368 visitors in June.

Thus, for the first six months of 2018, visitor arrivals, spending, visitor days and daily spending have all increased significantly. The ADVC for the first six months of 2018 was 29,319, up from 26,513 for the same period in 2017. The 33,368 average daily visitor census for June 2018 is a staggering number – the highest on record.

Yet over the past year there have been no major capacity improvements to the island’s infrastructure. In fact, tourism in Hā’ena and Wainiha was curtailed in April 2018 as a result of a severe storm and flooding which damaged homes and closed the road, Hā’ena State Park and Nāpali Coast State Wilderness Park. The road and the parks are not scheduled to reopen to visitors until October 2018.

One explanation for the increase in visitor arrivals in 2017 and the first half of 2018 may be the result of visitors who changed travel plans and chose to visit Kaua’i out of safety concerns about traveling to Mexico,<sup>14</sup> hurricane damage in destinations like Puerto Rico, the Caribbean and Florida or the recent volcanic eruptions on Hawai’i Island.

Occupancy remains high at visitor properties; Hawai’i Tourism Authority reported Kaua’i’s occupancy was 79.7%<sup>15</sup> for the first six months of 2018, though it should be noted that not all hotels and accommodations are included in this report. Anecdotally, properties on the island report occupancies in the 90<sup>th</sup> percentile range for that same period. HTA reported that timeshares had a 2017 occupancy level of 86.7%.<sup>16</sup>

The General Plan 2018 reported a projected annual visitor growth rate of 4 percent to 2020, dropping to an annual growth rate of less than 1 percent to 2030.<sup>17</sup> If current tourism growth is not managed and limited, those projections will prove far too low, further impacting the quality of life on the island.

It should be noted that historical experience has shown that the island’s tourism is vulnerable to world and climactic events, such as economic downturns, airline strikes, terrorism threats and major hurricanes and storms. Economic recovery from these major events can take years. For example, it took several years for Kaua’i tourism to recover from the global economic recession that hit the island in 2008. Figure 4 shows the dynamism and vulnerability of Kaua’i tourism.

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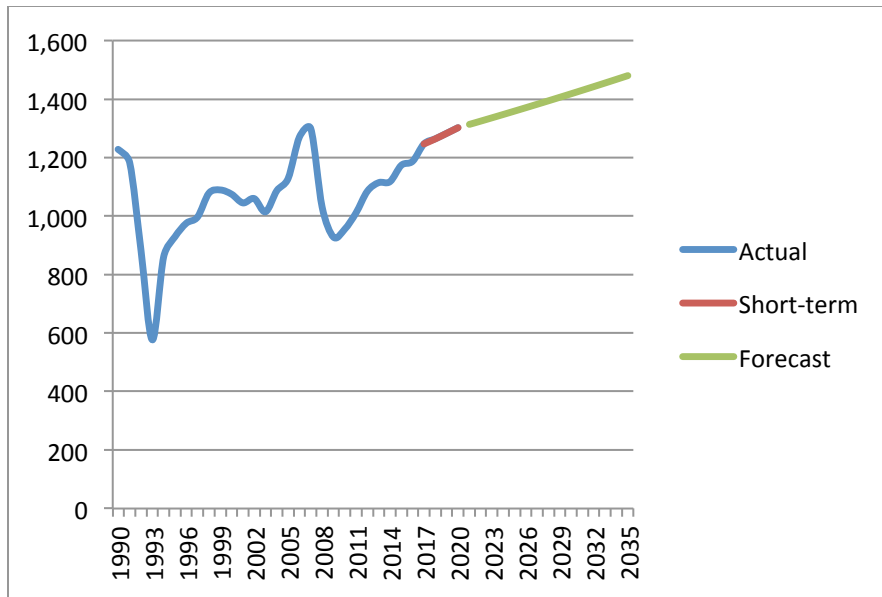
<sup>14</sup> Robert Silk, “U.S. airlines cut flights to Mexico beach areas,” *Travel Weekly*, July 30, 2018

<sup>15</sup> HTA Release (18-42) dated July 26, 2018

<sup>16</sup> HTA Release (18-27) dated May 9, 2018

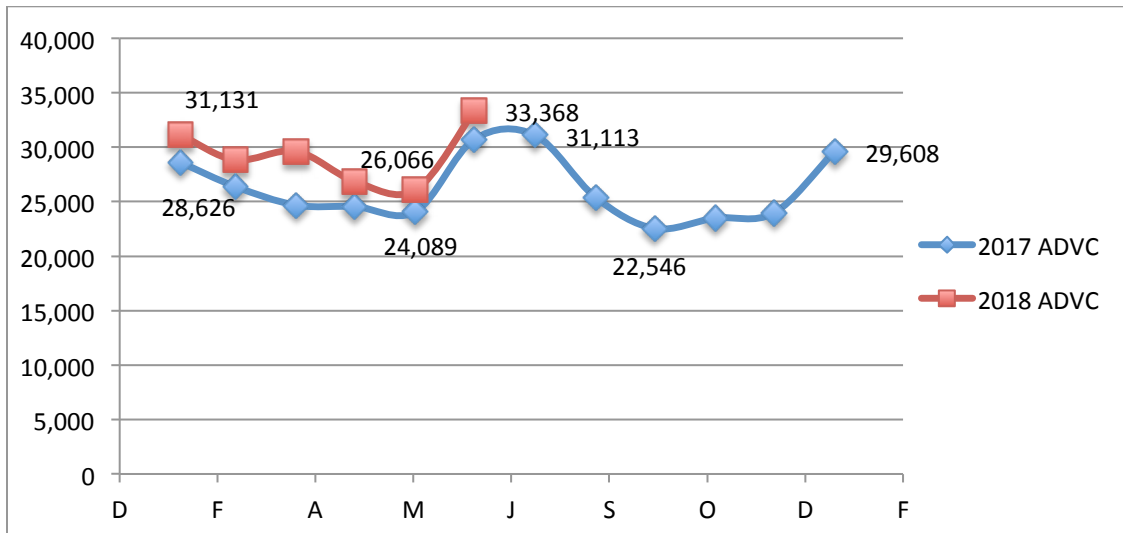
<sup>17</sup> Kaua’i County General Plan 2018, p. 160

**Figure 4. Kaua'i Visitor Arrivals by Year, Actual and Forecast, 1990-2035**



Visitor arrivals tend to fluctuate throughout the year. Figure 5 shows variation in the average daily visitor census by month. Winter and summer are the busiest, though the number of visitors in spring and fall are getting stronger.

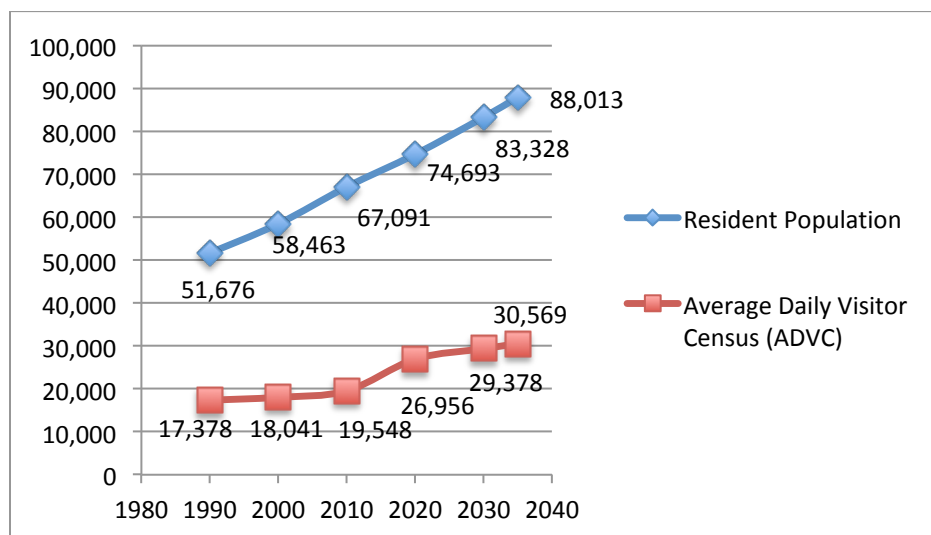
**Figure 5. Average Daily Visitor Census (ADVC) by Month for 2017 and YTD 2018**



## Resident vs. Visitor Growth

Increased traffic and crowding at beaches and parks is often blamed on tourism growth. In fact, that is only one factor in a more complex problem. The chart below shows the growth in tourism arrivals since 1990 and forecast to 2035, with a comparison of population growth during the same period. During most of that time period, resident population grew or is expected to grow at a slightly faster rate than visitor growth. It is interesting to note that, if the population and visitor projections in the *Kaua'i County General Plan 2018* prove accurate, there will be little change in the relative ratio of visitors to residents by 2035 (1 to 2.97 in 1990, expected to be 1 to 2.88 in 2035).

**Figure 6. Comparison of Actual and Forecast Kaua'i Resident Population and Average Daily Visitor Census (ADVC) 1990-2035**



## Visitor Accommodations – Current and Possible

The great majority of tourist accommodations are located in Visitor Destination Areas (VDAs) in Princeville, Kōloa-Po'ipū, Kapa'a-Wailua and Waimea, indicated in red in Figure 7 below.

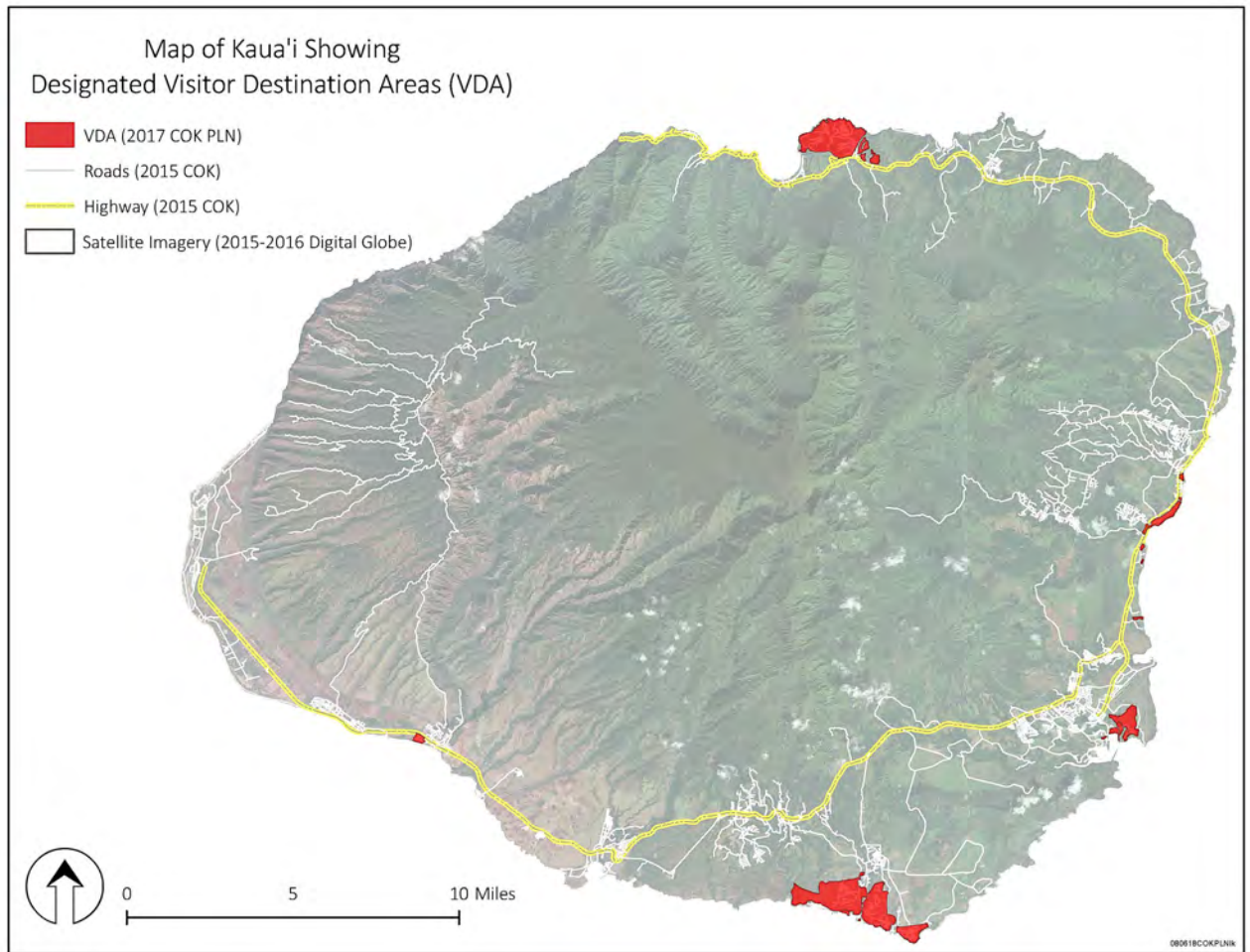
The combined total of real property taxes collected by the County on tourist accommodations is 41 percent; resort and hotel properties account for 20 percent and vacation rentals account for an additional 21 percent of the total real property tax revenue received.<sup>18</sup> Thus, these are important sources of revenue for the county. As stated in the *Kaua'i General Plan*, “dealing with excessive tourism also means dealing with the supply of visitor units.”<sup>19</sup>

<sup>18</sup> County of Kaua'i Real Property Data, 2016

<sup>19</sup> *Kaua'i County General Plan 2018*, p. 161



**Figure 7. Kaua'i Visitor Destination Areas<sup>20</sup>**

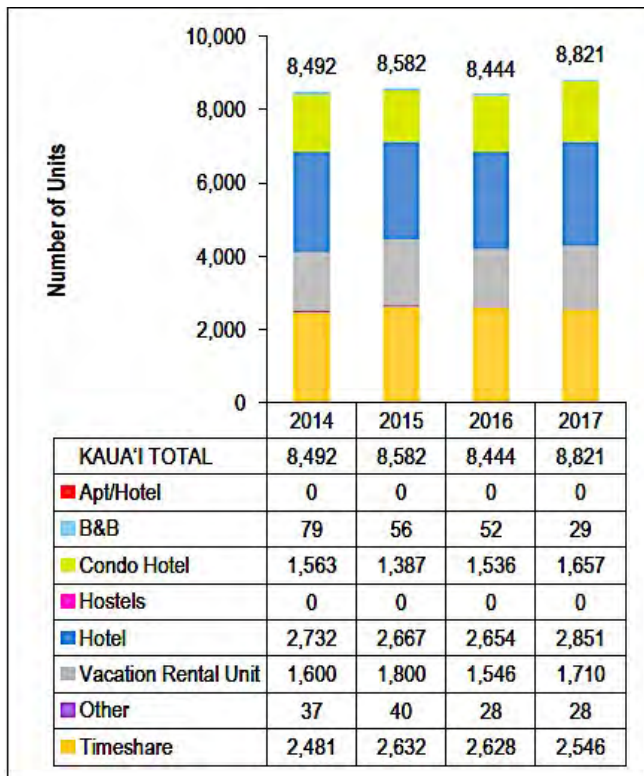


In 2017, Kaua'i had 8,821 recorded visitor units.<sup>21</sup> Lodging types include bed and breakfasts, condo hotels, hotels, vacation rentals and timeshares. Figure 8 below shows the distribution of the various types of accommodation. A recent addition is Timbers Kaua'i at Hōkūala that opened in Līhu'e in 2018; that property and Kōloa Landing Resort that opened in 2017 continue to add rooms. Two new hotels are in development, Coco Palms Resort (350 rooms) in Wailua and Coconut Beach Resort (326 timeshare units) in Waipouli.

<sup>20</sup> Kaua'i County General Plan 2018, Figure 3-11, p. 164

<sup>21</sup> Hawai'i Tourism Authority, "2017 Visitor Plant Inventory," Figure 9, p. 6

**Figure 8. Kaua'i Visitor Inventory by Unit Type<sup>22</sup>**



It is instructive to consider the cost of visitor accommodations on Kaua'i and how it has changed in recent years, as shown in Figure 9. Luxury and standard units have increased, while deluxe and budget units have decreased. As of 2017, Kaua'i accommodations were relatively equally divided in the luxury, deluxe and standard categories. Budget units are very limited.

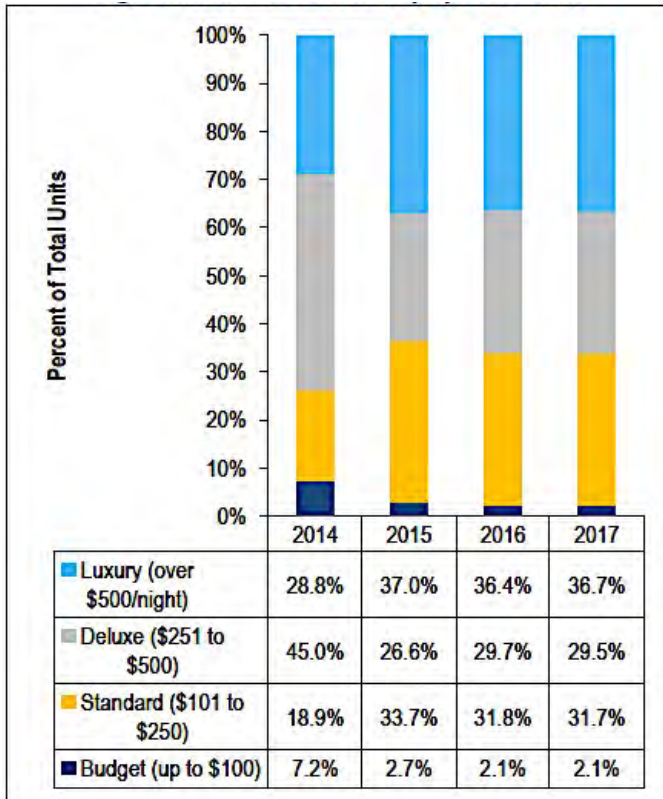
Placing limits on the number of new visitor units would be one way to manage visitor numbers. However, this option is hampered by land use approvals and project entitlements made many years ago that yield the possibility that the number of visitor units could increase substantially if these projects move forward. The current 8,821 units could expand by 3,000<sup>23</sup> if all the units already in the County pipeline are built and no new permits are granted (a 34% increase). Assuming the typical two or three visitors per unit, this could potentially increase the ADVC to an untenable number.

The *Kaua'i County General Plan 2018* suggests several possible measures to slow or limit this development, which, given the current level of stress on Kaua'i's infrastructure, will be critically important to undertake to ensure resident and visitor satisfaction.

<sup>22</sup> *ibid.*

<sup>23</sup> Kaua'i County General Plan 2018, p. 162

Figure 9. Kaua'i Inventory by Price Class<sup>24</sup>



### Overtourism Threatens Kaua'i's Future

There are many factors that combine to create a successful visitor destination and positive visitor experience. Natural beauty, gorgeous beaches and a good climate are not enough. Choices in accommodations, good restaurants, convenient transportation, cultural and recreation activities, shops, great customer service, visitor safety and welcoming residents all play a role.

While community members have expressed concern about unmanaged growth and visitor arrivals for a number of years,<sup>25</sup> the results of the Hawai'i Tourism Authority 2017 Hawai'i Resident Sentiment Survey<sup>26</sup> were a wake-up call for Kaua'i's visitor industry. The survey asks residents their opinions and perceptions of 24 measures related to tourism on the island. For Kaua'i in 2017, 11 of these measures ranked lowest in the state. Just three measures ranked highest in the state – related to visitor industry creation of well-paying jobs, opportunities for advancement and agreement that tourism provides more opportunities for shopping, restaurants, and entertainment. When comparing the 2017 report to the survey conducted in

<sup>24</sup> Ibid., Figure 11, p. 6

<sup>25</sup> Jacy L. Youn, "Kaua'i In Crisis: Mayor Bryan Baptiste deals with a garden of gridlock," Hawai'i Business, September 2005

<sup>26</sup> OmniTrak Group Inc., "HTA 2017 Hawai'i Resident Sentiment Survey," July 2017

2015, 20 of the measures for Kauaʻi showed a turndown, while only four showed an uptick. These are not desirable trends.

The *Kauaʻi Tourism Strategic Plan 2016-2018* stated that when the ADVC exceeds an average of about 25,000 per day, that level of tourism strains the current infrastructure and increases resident frustration. In 2017, the ADVC exceeded 25,000 in six different months; ADVC ranged from a low of 22,546 in September 2017 to a high of 31,113 in July of that same year. The daily average for 2017 was 26,267.

Data for 2018 to date are even more dramatic; for the first six months of 2018, the ADVC has exceeded 25,000 every month. The ADVC to date for January to June 2018 was 29,319.

Resident sentiment survey results, the volume of unhappy letters to the editor, opinion pieces critical of local tourism, and resident and visitor complaints make clear that the status quo for Kauaʻi tourism cannot continue.

While tourism has provided valuable jobs, contributed to the state and county's tax revenues and helped support other opportunities, the current level of tourism has overstretched the resources and infrastructure of Kauaʻi. At just 552 square miles and a 2017 population of 72,159<sup>27</sup>, on average in a given day one in three people on Kauaʻi is a visitor.

Destinations around the world are struggling with this same problem. Many have taken steps – sometimes radical steps – to mitigate the problems caused by more visitors than an area can accommodate responsibly. Examples of measures taken include:

- ◆ Restrict visitor numbers, impose caps
- ◆ Limit number of flights
- ◆ Limit number of cruise ships
- ◆ Limit size of cruise ships
- ◆ Restrict number of rental cars
- ◆ Provide alternative transportation systems
- ◆ Impose a visitor minimum daily expenditure
- ◆ Create tourist-free areas or events
- ◆ Utilize a resource management system to control visitor impacts
- ◆ Close access to a resource for a time or periodically
- ◆ Allow access only on defined trails and monitor visitors for compliance
- ◆ Enlist visitors as stewards of the land during visit
- ◆ Restrict or limit access to specific areas (charge fees, limit parking, restrict numbers)
- ◆ Require advance reservations for popular sites, beaches, parks, trails
- ◆ Increase visitor fees for access
- Impose time limits at sites
- ◆ Impose strict rules on commercial tour operators

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<sup>27</sup> U.S. Census Bureau, American Fact Finder

- ◆ Restrict development of new tourist accommodations and allow only within designated areas
- ◆ Impose and strictly enforce rules on alternative accommodations
- ◆ Limit number of alternative accommodations to protect housing for residents
- ◆ Limit the number of days per year a unit may be rented to visitors (for example, 30 or 60 days)

Already a few of these strategies are being tried on Kaua'i. More work is needed to determine the strategies that will enable us to better manage the island's tourism.

## REFOCUSING TOURISM TO FIND BALANCE: FRAMING THE 2019-2021 PLAN

In the past, the metrics for successful tourism have been economy-based: room occupancy, number of visitors, total expenditures of visitors, visitor industry contribution to government revenues and the local economy, and spending per visitor. On Kauaʻi, as in many world-class visitor destinations, times have changed. While the economic metrics of tourism are still vital, “quality of life” metrics are now essential: quality of the visitor experience, impact of the visitor industry on local residents and the environment, and the quality of life of visitor industry employees.

In order for the visitor industry to continue to thrive and be a positive contributor to our economy, it must also be a vital partner in contributing to the quality of life for Kauaʻi residents and protecting our island’s precious resources. This requires a “refocus” both within the visitor industry and in its relationships and partnerships at the local and State levels. This Tourism Strategic Plan lays out the vision, goals, and actions to achieve this vital refocus.

### Kauaʻi Tourism Strategic Plan’s Role in Creating Change

In considering how to refocus tourism, the KTSP Steering Committee considered the types of change (Ackerman, 1997) needed to find a better balance on our island. Simply put, there are three main types of change:

- ◆ Developmental - either planned or emergent; incremental
- ◆ Transitional – seeking a desired state different than existing one
- ◆ Transformational – radical change<sup>28</sup>

Experience has shown that developmental change, which takes place slowly and over time, has proved to be insufficient in dealing with the increasing complexities and challenges facing tourism on our island. It is time to transition to a more desired state. We believe this will require significant transformation over time for some aspects of tourism. It will require new thinking and forward-looking, bold action. Tourism must be better managed and impacts better anticipated. We cannot continue to market a destination that is not well managed and expect it to be sustainable over time. This change will also require the strong support of government, the visitor industry as a whole and the community at large. We believe these changes are needed to refocus tourism to meet the long- term needs of and find a balance for the island’s residents, the island’s resources and our visitors. While work on these changes will begin with this plan, some will take more time and continued effort. The following indicates some of the more significant changes that will be undertaken through this plan.

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<sup>28</sup> The term “transformational” here refers to human, policy and process changes; this is a different meaning than the usage in the Kauaʻi General Plan, in which transformational refers to changing characteristics of a land area

### Major Transitional and Transformational Change Planned

- ◆ Work with government leaders to gain a voice in decisions that impact the number of visitors to Kaua'i
- ◆ Control the use of housing as vacation rentals outside visitor destination areas to free up housing for residents and protect the character of neighborhoods
- ◆ Implement a multi-modal transportation system for residents and visitors to reduce congestion and carbon emissions
- ◆ Develop management plans for heavily visited parks, beaches, trails and cultural sites to determine capacity and protect and conserve the resource
- ◆ Increase the use of sustainable practices throughout the visitor industry to conserve resources and protect the environment
- ◆ Involve government, businesses and community as partners in the visitor industry
- ◆ Involve visitors as co-stewards of communities and the environment

### Tourism Trends – Current and Upcoming

To better understand the complexity of tourism and its role in the community, the Steering Committee gathered information on the anticipated trends that impact tourism planning and current issues facing Kaua'i. The following summarizes that research.

#### TRAVEL

- ◆ In the United States, freedom of movement, defined by the U.S. Supreme Court as the "right of free ingress into other States, and egress from them," has been judicially recognized as a fundamental Constitutional right.<sup>29</sup> Under the "privileges and immunities" clause, the Supreme Court gave the authority to protect freedom of movement to the states. As a result, people legally cannot be prevented from visiting Hawai'i.
- ◆ There are now more direct flights to Kaua'i, increasing the number of seats to be filled.
- ◆ Soon Hawaiian Air will fly direct nonstop to Hawai'i from Europe.
- ◆ Southwest Airlines is planning direct flights to Kaua'i.
- ◆ More private jets are expected, though Kaua'i has limited jet fuel storage capacity.

#### VISITORS AND CHOICES

- ◆ Kaua'i visitors have changed in recent years. In the past, when visitors traveled mostly in tour groups, stayed in hotels and traveled on tour buses with a set itinerary, the impacts did not feel as great as they do now. Today most visitors are free independent travelers (FITs), often staying in vacation rentals within communities, traveling in cars they rent for their entire stay and traveling in search of special, "undiscovered" places,

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<sup>29</sup> Paul v. Virginia, 75 U.S. 168 (1869)

including places they should not be. As a result, the impact of visitors feels much greater to the community.

- ◆ Kaua'i faces strong global competition and risks losing visitor market share to other destinations.
- ◆ Social media is widely used by visitors and it influences the choices they make; many of the online images show activities that are illegal, dangerous or culturally inappropriate.
- ◆ Many visitors want experiential travel activities – cultural, health and wellness, local foods, wilderness adventures.
- ◆ The number of millennial/younger visitors is increasing. They come with different expectations; many are looking for adventure – ziplining, hiking, water sports, ATVs, etc. Many come from the city and are looking for authentic and different experiences, e.g, a farm dinner or a homestay.
- ◆ Some visitors, especially millennials, are attracted to destinations with green initiatives; there is an increased awareness of sustainability issues.
- ◆ Many visitors are more interested in homestays and vacation rentals rather than hotels.
- ◆ Timeshare owners are aging and their children often are not interested in retaining the property.
- ◆ The number of returning visitors may decrease due to disappointment and frustration with infrastructure or due to service challenges.

#### **INDUSTRY CHANGES**

- ◆ Kaua'i's workforce is aging.
- ◆ Due to low unemployment (2.1% in May 2018), Kaua'i's available workforce cannot meet industry demand. Businesses are recruiting from the U.S. mainland and internationally.
- ◆ The visitor industry is relying more on technology, e.g., card locks on doors, automated check-in, etc.
- ◆ The size of some new cruise ships is larger than our current harbor can accommodate.
- ◆ Over the past few years, Kaua'i's visitor industry has initiated a wide range of conservation and sustainability measures to reduce water and energy use, reduce waste, purchase more local foods, and use more environmentally-friendly products.

### **Issues and Concerns**

#### **GOVERNANCE AND ECONOMY**

- ◆ Kauai's county administration will change in December 2018 and this may delay any new initiatives requiring county government action.
- ◆ Too little of the state-collected Transient Accommodations Tax (TAT) paid by visitors is going toward support of tourism-related projects. For example, in FY2017, \$350 million collected from the TAT was used to fund the Department of Education; in other words, it's being used to help balance the state's budget rather than offset impacts related to tourism.
- ◆ There is concern on Kaua'i that decisions made by State agencies don't always include input and feedback from the neighbor islands.



- ◆ There is uncertainty as to when the economic bubble will burst – but it will at some point, if history is any guide.
- ◆ The status quo is not working.

### INFRASTRUCTURE AND CAPACITY

- ◆ Residents are increasingly vocal in condemning what they perceive as overtourism – they believe the island’s capacity has been exceeded.
- ◆ Without better tourism management there will be a disconnect between HTA visitor goals and marketing strategies and what counties can handle.
- ◆ Kaua’i’s public facilities and infrastructure are lacking or are poorly maintained – e.g., roads, bridges, parks, trails and public toilets.
- ◆ Some of Kaua’i’s beaches and parks are overcrowded, diminishing the experience for all.
- ◆ Traffic congestion is a problem at certain times of day and in certain areas, such as the Kapa’a/Wailua corridor and between Līhu‘e and Tree Tunnel; traffic backs up and is a problem, especially on holidays and Sundays when there is no contra-flow.
- ◆ Visitors are blamed for Kaua’i’s traffic problems, but the growing resident population is a major contributor. In 2010, Kaua’i had 73,563 registered motor vehicles. In 2014, that number jumped to 85,652.<sup>30</sup> During the same period, continuing until the present, the number of rental cars has stayed relatively stable, averaging 8,000 to 10,000 registered vehicles per year.<sup>31</sup>
- ◆ Funds for road improvements will not be able to keep pace with capacity; available funds are targeted to road maintenance and safety improvements, not capacity expansion.
- ◆ Federal funds for infrastructure improvements may decrease under the current administration.
- ◆ TOTE Maritime has announced plans to start domestic cargo operations to Kaua’i; this will impact harbor facilities.
- ◆ In 2018, air seats to Kaua’i are projected to increase 43% over 2017<sup>32</sup> as airlines add more flights. This number is subject to change (e.g., plans for a direct flight from Dallas have been cancelled).
- ◆ Kaua’i does not have a say in the number of air seats to the island or the number of flights; these are controlled by the FAA with the approval of the Hawai’i Department of Transportation.
- ◆ The length of the Līhu‘e runway limits the size of planes able to land on Kaua’i, which may help limit the number of visitors.

### VULNERABILITIES

- ◆ Climate change is affecting sea level and weather; storms may be more severe and, over time, sea level rise will impact hotel and vacation rental properties in low lying areas.
- ◆ Tourism is sensitive to economic disruptions, major weather events, and geo-political issues.<sup>33</sup>

<sup>30</sup> Motor Vehicle Registration Trend, <https://data.hawaii.gov/widgets/i6gp-tvm3>

<sup>31</sup> Communication from Samira Siale, Account Manager-Kaua’i, Enterprise Holdings, August 13, 2018

<sup>32</sup> The Garden Island, “Flights to Kaua’i to increase by 42.6% in 2018,” August 27, 2017

<sup>33</sup> Kaua’i General Plan 2018, Appendix H., p. 482

- ◆ Kauaʻi tourism has seen its share of “boom and bust” cycles resulting from weather or economic events.
- ◆ The resort development and tourism boom of the 1980s was interrupted when Hurricane Iniki hit the island in 1992; it took nearly a decade to rebuild and recover.
- ◆ Kauaʻi also took a major hit from the global economic recession in 2007-2008; once again, it took nearly a decade to reach pre-recession visitor arrival numbers.

### **PARKS AND TRAILS**

- ◆ Visitors and residents complain about the poor condition and maintenance of park bathrooms and parking areas.
- ◆ Overuse is contributing to erosion on the island’s trails.
- ◆ People access areas that are not designed for visitors and that may be unsafe.

### **REGULATION AND ENFORCEMENT**

- ◆ Many rules exist but are not enforced; for example, non-allowed uses are taking place at some beaches and parks and many vacation units are operating illegally.
- ◆ Residents and hikers complain about helicopter noise pollution in neighborhoods and remote areas.
- ◆ Drone use is increasing and is not permitted in parks and some other areas, yet this is rarely enforced.

### **KAUAʻI VISITOR SAFETY**

- ◆ Kauaʻi continues to experience an increased rate of property crime.
- ◆ Not all beaches have lifeguards and there are several ocean-related drownings every year.
- ◆ Kauaʻi has a number of storm-related events and it is difficult to provide communications to visitors not staying in hotels and timeshares.
- ◆ Many vacation rentals do not have a disaster plan in place or have not communicated the plan to guests, as evidenced by the April 2018 floods.
- ◆ Recent events proved that a missile strike is a possibility and poses a threat.

### **RESIDENT POPULATION**

- ◆ The number of residents is growing, not just the number of visitors.
- ◆ During peak times, residents become frustrated with crowded conditions at beaches and parks; the attitudes of residents toward visitors are deteriorating.

### **HOUSING**

- ◆ There is a serious lack of affordable housing for residents and industry employees; as many as 9,000 more housing units will be needed by 2035.<sup>34</sup>
- ◆ Some long-term rentals are being converted to vacation rentals,<sup>35</sup> reducing available housing for local residents.
- ◆ There is gentrification of some neighborhoods, leading to higher home prices.
- ◆ It seems there is a growing homeless population who appear to be from out of state.

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<sup>34</sup> Kauaʻi County General Plan 2018

<sup>35</sup> “Hawaiʻi Vacation Rentals: Impact on Housing & Hawaiʻi’s Economy,” Hawaiʻi Appleseed Center for Law and Economic Justice, March 2018

## VISITOR ACCOMMODATIONS

- ◆ Hotels are full and prices are high; many visitors seek vacation rentals as a cheaper alternative for lodging and food.
- ◆ There is growing concern about the proliferation of vacation rentals on Kauaʻi, some of which are operating without legal permits; this is upsetting residents and changing the residential characteristics of neighborhoods; this is especially evident in some areas on the North Shore, such as Haʻena and Wainiha.
- ◆ 1 in 8 Kauaʻi homes is a vacation rental, compared to one in 24 statewide.<sup>36</sup>
- ◆ 52% of vacation rental units are owned by nonresidents.<sup>37</sup>
- ◆ Vacation rentals are seen as a good investment, as rents can be much higher than long-term rentals.
- ◆ There is concern that many additional visitor units are already entitled and may be built, further adding to overtourism.

## WORKFORCE AND WAGES

- ◆ A worker shortage exists due to low unemployment (2.1% in May 2018); filling current jobs is difficult
- ◆ Kauaʻi's young people don't always see adequate opportunity on the island and leave, causing a "brain drain" of local young adults
- ◆ Wages have to be competitive to attract workers
- ◆ Some businesses have begun offering signing bonuses to attract workers
- ◆ The inability to fill jobs impacts customer service and may limit business expansion
- ◆ Wages are not keeping up with inflation, creating a growing social inequity
- ◆ Many residents work multiple jobs to make ends meet

## COMMUNICATIONS/PUBLIC RELATIONS

- ◆ There is a general lack of understanding about the role of the visitor industry on Kauaʻi; a public relations approach is needed.

These trends and challenges serve as the backdrop for the action proposed in this tourism strategic plan.

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<sup>36</sup> *ibid.*

<sup>37</sup> *ibid.*

# KAUA'I TOURISM STRATEGIC PLAN 2019-2021

## KTSP and Refocusing Tourism

This plan covers three fiscal years, 2019 to 2021 (July 2018 to June 2021). In creating this tourism strategic plan, the KTSP Steering Committee and the priority strategy committees have considered how to:

- ◆ Recognize Kaua'i's limits, including impacts of unmanaged visitor growth, and consider what the island's sites can sustain and how to sustain them
  - Determine resources where access should be limited or restricted
  - Work with County, State and Federal officials to gain a stronger visitor industry voice in decisions that will impact our infrastructure and resources
  - Make enforcement a priority
- ◆ Align the Kaua'i tourism plan with relevant state and other county plans
- ◆ Set a vision for the future
- ◆ Collaborate for policy change
- ◆ Collaborate for regulatory change
- ◆ Encourage programs and infrastructure where needed
- ◆ Communicate and educate stakeholders and decision-makers, including County and State administrators and elected officials
- ◆ Advocate, especially for enforcement of regulations.

## Kaua'i's Tourism Values

Kaua'i's visitor industry is fortunate to be able to draw on so many unique and special aspects of the island. To support this uniqueness, our values for tourism on Kaua'i are to:

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

## 2040 Vision for Tourism

The tourism actions taken today will have lasting impacts on the future. If we have a clear vision of that future, we can be guided by it in creating actions to take now.

**In our vision of tourism in 2040**, Kaua'i is a global leader in the reinvention of the visitor industry. Collaborative action by community stakeholders has addressed unsustainable

visitor growth as well as climate change and social inequity. Tourism remains a valued economic sector, as other sectors have emerged to offer greater stability and opportunity for the island.

*Transportation:* The importance of the transport shift to a multi-modal system can't be overstated, as it has transformed every aspect of island life. Tourism and the broader economy have been decoupled from the single occupancy vehicle. Only 30% of visitors rent cars for their entire stay. Shuttles take visitors and residents to primary destinations around the island. Electric vehicles, many of which are shared, have replaced gas and diesel cars. Bike shares abound. The coastal path has been extended in areas around the island, and both visitors and residents use the range of transportation innovations. Roads are less congested and safe for walking and biking.

*Housing:* Hotel properties have converted surplus parking areas, thanks to the transportation shift, into mixed-use developments. Many employees and their families enjoy living on-site and in nearby neighborhoods where affordable housing has been built. Denser, walkable towns reduce costs for residents, making their lives more affordable. Long distance commuting from home to work or shopping is rare. Short and long-term housing rentals are registered and regulations are enforced, offering a much clearer grasp of island capacity and better data for decision-making.

*Sustainable Practices:* Tourism-related businesses, along with the community, implement measures to conserve resources and protect the environment. Food, products and services are locally sourced. Waste is reduced, organic waste is managed on-site where possible, recycling is seamless; all this reduces solid waste production for the larger community. Wide use of greywater has the triple benefits of reducing water consumption, reducing wastewater loads, and supplying lower cost irrigation water.

*Climate Change:* Visitors offset their aviation emissions by volunteering or financially supporting projects benefiting local communities, such as improving the health of the island's watersheds. Government and visitor industry leaders work together to support building and zoning policies that anticipate and respond to climate change and sea level rise, ensuring public safety.

*Cultural, Recreation and Rejuvenation Spaces:* Kaua'i has developed place-based resource management systems and practices to control capacity, access and conservation. Innovative funding mechanisms have helped establish and maintain healthy and vibrant beaches, parks, trails and public spaces for active and passive use. Cultural sites are protected and preserved to help educate and inspire us. Users consider themselves co-stewards of these unique spaces.

*Visitor Experience:* Visitors continue to come to Kaua'i from around the world to enjoy longer, extended vacations on a green island that has integrated culture and natural resource management into everyday life. They conduct themselves with respect and appreciation for the cultural and natural environment. They follow the controls put in place

in areas of high cultural or ecological value with the understanding that it will benefit their experience as a visitor. Well-trained employees offer renowned customer service. Our community works to maintain balance in visitor arrivals to ensure positive experiences for visitors and residents alike. Managed access at popular destinations is a win-win for all.

*The Inspiration:* Achieving this vision would not have been possible without the inspiration and traditions of our Hawaiian culture, which gifted us with a holistic and inclusive approach to problem solving. Kaua'i continues to draw on the aloha spirit of its residents and its natural beauty. Residents view tourism as a valued partner in and contributor to the community.

## KTSP Goal for 2019-2021

Guiding this three-year plan is the following Kaua'i visitor industry goal:

**Our goal** is to refocus tourism to responsibly manage the economic activity of Kaua'i tourism in a sustainable manner while creating memorable experiences for visitors, improving quality of life for residents and ensuring the stewardship of our natural and cultural resources.

## The Visitor Kaua'i Wants to Attract

Visitors select destinations that meet their interests and travel style. Kaua'i may not be the ideal destination for everyone. In general, the visitors Kaua'i hopes to attract will be:

- ◆ Free independent travelers (FIT) (an individual or small group traveling and vacationing with a self-booked itinerary)
- ◆ A mix of new and returning visitors
- ◆ Families
- ◆ From all income levels
- ◆ Interested in culture and heritage
- ◆ Those who enjoy new experiences
- ◆ Nature lovers
- ◆ Ecotourists who respect the environment
- ◆ Those who want to enjoy outdoor activities, such as hiking, kayaking, ziplining, ATV tours, golf, etc.
- ◆ Celebrating romance

## Broad Tourism Objectives 2019-2021

Kaua'i's first tourism strategic plan from 2006 laid out seven broad objectives. Those objectives remain relevant and guide this new plan.

1. Make positive contributions to the quality of life for residents.
2. Collaborate with stakeholders and decision-makers to find a balance to manage visitor impacts on Kaua'i.
3. Increase the economic contribution of the visitor industry to Kaua'i.
4. Increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.
5. Maintain and improve visitor satisfaction with their experience on Kaua'i.
6. Reinforce authentic Native Hawaiian culture and local Kaua'i culture, the foundations of our unique sense of place.
7. Contribute to the preservation and enhancement of the natural resources on Kaua'i, including land and ocean.

## Taking Action: Priority Strategies and Action Plans for 2019-2021

The tourism issues and trends identified earlier in this document demonstrate there are many possible priority areas of focus for the island's visitor industry. However, taking action on all these areas is constrained by available funding, volunteer committees and their available time, and lack of full-time staffing.

Five key areas were selected that will play an important role in refocusing tourism over the next three years. The strategies related to these priorities and the actions that will be undertaken are summarized in action plans below. Each action plan describes the strategy, actions and partners involved, timelines, desired outcomes and measures of progress. Additional priorities can be addressed as circumstances change during the course of this plan or in future plans. Specific targets for each of the measures will be developed in Year 1 of the plan and progress toward those targets will be reported annually.

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## PRIORITY STRATEGY ACTION PLAN – SUSTAINABLE TOURISM

**Strategy:** Develop the systems, processes, supports, regulations and partnerships needed to support Kaua’i as a green island that sustainably integrates tourism as an important contributor to the quality of life of residents and offers a satisfying and unique experience for visitors.

**Committee:** Jim Braman, Katy Britzmann, Nalani Brun, Hilmy Dole, Sue Kanofo, Mark Perriello, Rayne Regush, Laura Richards, Ben Sullivan, Paul Toner, Denise Wardlow

**Partners:** CoK Planning Dept., KEDB, HLTA, KIUC, Kaua’i Chamber of Commerce, Filipino Chamber of Commerce, NHCC, PBRA, NSBC, RCCA, HTA, KVB, OED

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Partner with other counties, agencies, elected representatives, and organizations to establish the County’s authority to have a role in decisions regarding the number of flights and air seats coming to Kaua’i.	L: CoK OED P: Mayor, County Council, State and Federal legislators, HSAC, HLTA, PBRA, NSBC, RCCA, HTA, HTA, KVB, Kaua’i CoC, FAA, HDOT	2019: Develop partnership, establish agreement on desired outcomes, create plan, determine if legislative changes are needed 2020, 2021: Implement and assess plan	Kaua’i is consulted and has a major voice in decisions related to the number of air seats to the island in order to better manage tourism	Manage # of air seats as determined by Kaua’i’s stakeholders

2	Support the County administration in its efforts to reduce or restrict the number of new visitor units for projects that have received entitlements and approvals but are not yet under construction.	L: CoK Planning Dept. P: TSP Sust. Tourism Cte., HLTA, Kaua'i CoC	2019 and ongoing	Planning Dept. finds legal methods to limit new units	No new visitor units beyond what are already under construction
3	Encourage expanded use of sustainability practices among tourism-related businesses to support a green island.	L: CoK Sustainability Coordinator P: CoK OED, Planning Dept., HLTA, PBRA, NSBC, RCCA, HTA	2019: Prepare status inventory; create partnership and operational plan in 2020, 2021: Implement and assess plan	50% of visitor industry businesses are active in the partnership and have implemented one or more sustainability measures	- % reduced energy use - % waste output - Dollars saved - Increased spending on local goods and services - Funding available for watershed partnerships
4	Advocate for funding to engage experts in tourism management and overtourism strategies to keep pace with industry best practices and guide long-range decision-making.	L: KEDB P: HTA, HGG, HLTA, OED, PBRA, NSBC, RCCA	Jan. 1, 2019 and ongoing	Fund established to draw on as needed during course of this plan	- Expert guidance can be contracted as needed
5	Participate in and support the County's development of a collaborative waste management strategy for the visitor industry that focuses on management of organic waste and waste reduction over 'universal recycling'.	L: CoK Solid Waste P: HLTA, OED, HGG, PBRA, NSBC, RCCA, HTA	2019: Prepare status inventory; create partnership and operational plan	70% of visitor industry businesses are active in the partnership and adopt shared best practices.  Best practices have	- Wide adoption of on-site organics management - Reduced waste generation - Reduced frequency of

			2020, 2021: Implement and assess plan	an impact on the overall function of the system, not just on operations at individual businesses	trash pickup & reduced disposal costs - Increased diversion of organic waste
6	Participate in developing reporting standards and GHG emissions targets within the local visitor industry that align with goals in the Kaua'i General Plan.	L: OED P: KIUC, HTA, HGG, HLTA, OED, PBRA, NSBC, RCCA	2019: Prepare Visitor industry energy use & GHG Inventory	% of visitor industry businesses voluntarily reporting emissions	# of visitor industry businesses aware of and committed to State and County GHG reduction policy
7	Advocate for government regulations that: 1) strictly enforce regulations for all alternate accommodations and institute strong penalties for non-compliance, 2) only allow new alternate accommodations in the VDAs in compliance with zoning and density requirements, 3) as accommodations in non-VDA areas change hands, the "alternate accommodations" status expires and is no longer entitled as part of property ownership and 4) explore creating new regulations to disincentivize the purchase of properties as transient vacation units, such as limiting the number of days per year that a property may be rented for transient vacation use.	L: CoK Planning P: KTSP Sust. Tourism Cte., HLTA , KVB, Kaua'i Chamber, CoK OED, Kaua'i Board of Realtors	11/30/2018 – research communities successfully dealing with this issue; create plan to discuss issue and needed legislation in 2019 session with government officials; FY2020 and	-New regulations to include: county registration with GET number; local rep contact information; how they will share emergency procedures; protocols for staying in a local community with guests; evidence of property conformance	- Hawai'i Resident Sentiment Survey - Reduced neighborhood complaints - Increased GET, TAT and property tax revenue, penalty fines and possibly registration fees

			2021 - monitor alternate accommodations and suggest needed legislative changes	with zoning and safety requirements. -Develop a penalty system with enforcement for those that don't comply and that operate illegally	
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## PRIORITY STRATEGY ACTION PLAN – TRAFFIC AND TRANSIT

**Strategy:** Support a comprehensive multi-modal land transportation system that integrates community planning, street design, traffic management, shuttle and transit services, and bicycle and pedestrian travel, in order to reduce traffic congestion, improve safety and provide mobility as a seamless service.

**Committee:** Nalani Brun, Bob Crowell, Larry Dill, Jody Kono Kjeldsen, Sue Kanoho, Michael Moule, Neill Sams, Lee Steinmetz, Ben Sullivan

**Partners:** PBRA, RCCA, KBA, NSBC, KVB, County Finance and Planning Departments

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Educate the visitor industry on its role in implementing the comprehensive multi-modal transportation system as outlined in the General Plan and the Short Range Transit Plan (SRTP), and secure broad visitor industry support for the vision.	L: KVB, CoK OED P: CoK Planning Dept., HLTA, Kaua'i CoC, KVB, PBRA, RCCA, NSBC, KBA	Jan. 1, 2019 and ongoing	- Identify resort districts that want to cooperate	- Reduction in # of visitors renting cars for all days of stay - # of employees riding bus or shuttles - Decrease in VMT - HTA Visitor Survey
2	Catalyze innovative solutions, such as rideshare, carshare and bikeshare, to dovetail with the General Plan and Short Range Transit Plan.	L: CoK OED P: CoK Planning, HLTA, Kaua'i CoC, KVB, PBRA, RCCA, NSBC, KBA	Jan. 1, 2020 and ongoing	- Reduce visitor and visitor industry employee use of single occupancy vehicles	- Reduction in # of visitors renting cars for all days of stay - # of employees in car or bikeshares - Decrease in VMT

3	Support funding and implementation of the North Shore Shuttle as recommended in the SRTP, and coordinate with implementation of the Hā'ena State Park Master Plan.	L: CoK Planning Dept. P: NS Comm. Assn., NSBC	12/31/18 – Shuttle and visitor and resident campaign operational 6/30/19 – Long-term funding plan in place FY2020-2021 Understand future phases to coordinate with Hā'ena SP Master Plan	<ul style="list-style-type: none"> <li>- Shuttle operational and congestion reduced</li> <li>- Community supports shuttle at Council when action is needed</li> <li>- Long term funding plan completed</li> <li>- Future phases understood</li> </ul>	<ul style="list-style-type: none"> <li>- Shuttle ridership</li> <li>- # of cars on road (tied to frequency)</li> <li>- HTA Visitor Survey</li> <li>- HTA Resident Sentiment Survey</li> </ul>
4	Participate in researching the use of business improvement districts to fund multi-modal transportation solutions, including resort area shuttles and shuttles from the airport to resort areas.	L: TSP Traffic & Transit Cte. P: CoK Finance and Planning Depts., PBTA, RCCA, NSBC, County Attorney, County Council	6/30/19: Determine viability of action (Go/No Go) If Go, set one up by 6/30/20, one more by 6/30/21	Establish at least one BID to provide funding for BID improvements	<ul style="list-style-type: none"> <li>- Resort areas that buy in to BID concept</li> <li>- BID funds collected and disbursed to projects</li> </ul>

5	Engage Po'ipū community and resorts in Po'ipū Road design, parking needs and possible support of landscape maintenance.	L: CoK Public Works P: CoK Planning, PBRA	FY2019- Planning FY2021- Construction	<ul style="list-style-type: none"> <li>- Roadway is rebuilt</li> <li>- Resort community maintains roadway landscaping</li> </ul>	Project complete
6	Support completion of the Kapa'a Transportation Solutions priority projects as outlined in the General Plan.	L: HDOT P:	2020: Widening of Kuhio Highway (Kuamoo to Bypass); 2025: Add northbound lane to Bypass (Olohena to Kuhio); 2027: Add capacity to Kuhio Hwy. (Wailua River to Kapule)	<ul style="list-style-type: none"> <li>- Kuhio Highway widened (Kuamo'o to Bypass)</li> <li>- Northbound lane added to 'Olohena to Kuhio bypass</li> <li>- Capacity added to Kuhio Hwy. (Wailua River to Kapule)</li> </ul>	Reduced travel times
7	Support completion of a shared use lane or path linking Nāwiliwili Harbor with Rice Street.	L: HDOT P: CoK Public Works	TBD	Increased safety and opportunity for pedestrians and bike users	Increased pedestrian and bike counts

## PRIORITY STRATEGY ACTION PLAN – NATURAL AND CULTURAL ENVIRONMENT

**Strategy:** Sustainably manage and maintain parks and trails for the safe and responsible enjoyment of residents and visitors.

**Committee:** Nalani Brun, Alan Carpenter, Sue Kanoho, AnaStasia Lytle, Ce Lucente, Nancy McMahon, Laura Richards, Victoria Wichman

**Partners:** County Parks and Recreation, State Parks, OED, KVB

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Encourage government agencies and community groups responsible for Kauaʻi’s natural and cultural resources to adopt a management framework, with community input, to determine appropriate site capacity and the conservation, preservation and mitigation measures needed to ensure the long-term sustainability of the resource.	L: Nat. & Cult. Env. Cte. P: DLNR State Parks Div., CoK Parks & Rec. Dept., Community	FY2020 and ongoing	Management framework researched and implemented in at least 2 sites	HTA Visitor Survey  HTA Resident Sentiment Survey
2	Work with elected officials to develop dedicated funding to support the long-term maintenance and improvement of infrastructure, parks, trails and cultural sites for the benefit of residents and visitors.	L: Nat. & Cult. Env. Cte., CoC P: DLNR State Parks, County Parks & Recreation	December 2018 and ongoing	New funding source(s) approved for maintenance and improvements	Additional dedicated funds approved
3	Support initiation of the adaptive management of State parks and trail resources, which may include placing limits or restrictions to protect the resource; update the trail map.	L: DLNR State Parks Div. P: County Parks & Recreation, Nat. & Cult. Env. Cte.	FY2019: Begin implementing Hāʻena State Park Master Plan	- Implementation funds secured - Enhanced visitor and resident experience - Resources protected and conserved	HTA Visitor Survey  HTA Resident Sentiment Survey



4	<p>Encourage revenue generation for ongoing park improvement and maintenance:</p> <ul style="list-style-type: none"> <li>- generate income through fees for out-of-state visitors, grants and voluntary donations</li> <li>- institute a payment system for commercial users to access specified areas as a way to fund improvements and maintenance and to control access to these areas.</li> </ul>	<p>L: DLNR State Parks Div., County Parks and Recreation P: Community, Nat. &amp; Cult. Env. Cte.</p>	<p>State: FY2019, then annually  County: FY2020, then annually</p>	<ul style="list-style-type: none"> <li>- Implementation funds secured</li> <li>- Enhanced visitor and resident experience</li> <li>- Resources protected and conserved</li> </ul>	<p>HTA Visitor Survey  HTA Resident Sentiment Survey</p>
5	<p>Advocate for funding for the Hā'ena and Kōke'e State Park master plans and support implementation of the plans.</p>	<p>L: DLNR State Parks Div., P: Legislators, Community, Nat. &amp; Cult. Env. Cte.</p>	<p>FY2019 and ongoing: Hā'ena SP FY2020 and ongoing: Kōke'e SP</p>	<ul style="list-style-type: none"> <li>- Implementation funds secured</li> <li>- Enhanced visitor and resident experience</li> <li>- Resources protected and conserved</li> </ul>	<p>HTA Visitor Survey  HTA Resident Sentiment Survey</p>
6	<p>Support the update of the Nāpali Coast Management plan.</p>	<p>L: DLNR State Parks Div. P: Community, Nat. &amp; Cult. Env. Cte.</p>	<p>FY2021</p>	<ul style="list-style-type: none"> <li>- Plan completed and approved</li> </ul>	<p>HTA Visitor Survey  HTA Resident Sentiment Survey</p>
7	<p>Improving messaging and visitor education on natural resource conservation and interpretation:</p> <ul style="list-style-type: none"> <li>- update the trail map</li> <li>- install trail markers</li> <li>- place standardized kiosks at trailheads with safety tips, map and interpretive information</li> <li>- use a system, such as social media and QR</li> </ul>	<p>L: DLNR State Parks Div. P: DOFA, TSP Communications Cte.</p>	<p>FY2020</p>	<p>Messaging and visitor education program completed</p>	<p>HTA Visitor Survey</p>

	<p>codes, to share information and messages and provide download access to the system at the airport</p> <ul style="list-style-type: none"> <li>- encourage visitor guides, boat operators and other tourism providers to present information that increases visitor understanding of Kaua'i's unique cultural and natural environment.</li> </ul>				
8	Consider areas to expand parks and trails use to mitigate overcrowding and resource degradation.	<p>L: DLNR State Parks Div. P: County Parks &amp; Recreation</p>	FY2021	Phased expansion plan completed and ready when funding available	<p>HTA Visitor Survey</p> <p>HTA Resident Sentiment Survey</p>

## PRIORITY STRATEGY ACTION PLAN – EMPLOYEE DEVELOPMENT

**Strategy:** Support career exploration and preparation programs that attract new workers to the visitor industry and provide career development opportunities for visitor industry incumbent workers to ensure an available, well-qualified workforce.

**Committee:** Ka’eo Bradford, Nalani Brun, Peggy Lake, Adele Manera, Marion Paul, Mark Perriello, Samira Siale, Peter Sit, Cheryl Stiglmeier, Dawn Taba, Candace Tabuchi (Chair)

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Support KPAA/Keiki to Career’s Career Connection program for high school students and encourage visitor industry employers to participate.	L: KPAA/ Keiki to Career P: HLTA	FY2019 - provide speakers FY 2020 – expand participation, if Keiki to Career can secure funds	- HLTA provides speakers for freshmen - Tourism seen as career path for graduating seniors	- # of students in Career Connections at Kapa’a & Waimea High Schools - # of students graduating from high school with HOST certificate
2	Update the flyer of training opportunities for new and incumbent workers and options for funding to support worker training.	L: OCET P: Emp. Dev. Committee	Annually	- Tourism employers use updated list	- # of tourism employees utilizing available training
3	Support KCC’s HOST program, including the Prior Learning Assessment (PLA) and Early College programs.	L: HOST Program Coordinator P: Emp. Dev. Committee, HLTA	Annually	- HLTA shares HOST information with members - Tourism employers share PLA and Early	- # of Waimea & Kapa’a High School students in Early College - # of students using PLA

				College information with staff	
4	Continue to support the Lead, Expose and Inspire (LEI) program for high school juniors and seniors.	L: ClimbHI, HTA P: KCC HOST staff and students	Annually in Spring	<ul style="list-style-type: none"> <li>- Students become interested in tourism careers</li> <li>- Leadership skills of KCC student mentors strengthened</li> </ul>	<ul style="list-style-type: none"> <li># of students at career fair</li> <li># of KCC mentors</li> </ul>
5	Explore the advisability of requiring certifications for specific positions in Hawai'i, such as tour guide certification and certification of professional development in customer service.	L: KCC OCET P: HLTA	Certificate programs offered 1-2 times per year	Jobseekers or employees with certifications have career advantage	<ul style="list-style-type: none"> <li>- Employer awareness of program</li> <li>- # of employers offering advantage for those with certification</li> </ul>

## PRIORITY STRATEGY ACTION PLAN – COMMUNICATIONS

**Strategy:** Utilize effective communications with all visitor industry stakeholders – including visitors, residents, elected officials and the visitor industry at large – so all are informed and have opportunities for dialogue to minimize conflicts and improve tourism as a valuable economic contributor.

**Committee:** Nalani Brun, Pamai Cano, Larry Feinstein, Sue Kanoho, Joy Koerte, Veronica Lovesy, Jan TenBruggencate, Beth Tokioka

**Partners:** HTA, HVCB, Mayor, Kaua’i Chamber of Commerce, Kaua’i Business Council, Filipino Chamber of Commerce, Native Hawaiian Chamber of Commerce, Po’ipū Beach Resort Association, Royal Coconut Coast Association, North Shore Community Council

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Educate visitors before arrival through videos and social media, and after arrival through appropriate signage apps, tourism websites and well-informed visitor industry employees.	L: KVB P: HTA, HVCB	12/31/18- new campaign in place; adjust annually	Visitors gain understanding of local residents and culture and respect the environment and cultural sites	HTA Visitor Survey  KVB Survey  HTA Resident Sentiment Survey
2	Keep residents informed of the role of the visitor industry in the community, solicit input and maintain ongoing communications to solve problems and mitigate concerns, recognizing that tourism is a valuable economic contributor.	L: CoK Mayor, OED P: KVB	Annually, at planned events and through timely response to citizen inquiries and complaints	Ongoing two-way communication with residents to foster understanding of issues, minimize conflict and enlist support for tourism	HTA Resident Sentiment Survey

3	Educate elected officials on the Kaua'i Tourism Strategic Plan and the long-range vision for Kaua'i tourism and maintain ongoing communications on issues related to tourism and needed policies and regulations.	L: Kaua'i Chamber of Commerce, KBC, Sustainable Tourism Cte. P: KVB	Annually in May and November/early December	Elected officials are well informed to understand and support current and long-range visitor industry issues	Extent to which elected officials propose and support needed changes
4	Educate the visitor industry, such as at tourism association and employee meetings or through webinars, about the Kaua'i Tourism Strategic Plan and enlist their support and assistance in its implementation	L: KTSP SC P: KTSP Committees	August 2018 for baseline; June 2019, 2020, 2021	Visitor industry managers are aware of and support the KTSP	Annual survey of visitor industry managers
5	Brief state and county agencies related to tourism about the KTSP and Kaua'i issues related to the industry; enlist them as partners implementing the KTSP.	L: Comm. Cte. P: State and County agencies	Jan. 1, 2019	Relevant agencies aware of and agree to partner	Number of partnering agencies
6	Create activities that bring all stakeholders (including community members, community groups and tourism leaders and staff) together to share updates, data and ideas on Kaua'i's visitor industry.	L: CoK OED P: KVB, tourism and business associations, Kaua'i CoC, NHCC, community associations	June 2019, then annually	Shared understanding and support for the Kaua'i tourism vision and plan	Number of stakeholders participating  Number responding that communication and needed action have been improved

## PRIORITY STRATEGY ACTION PLAN – PLAN IMPLEMENTATION

**Strategy:** Ensure successful plan implementation by coordinating meetings and communications of the Steering Committee and priority strategy committees, tracking progress on action plans, reporting progress and updating action plans when needed.

**Partners:** Project facilitator, Executive Committee (Kaua'i Visitor Bureau, County of Kaua'i Office of Economic Development)

#	Planned Action	Lead (L) & Partners (P)	Timeline	Desired Outcome	Measure of Success
1	Contract for services to facilitate and coordinate the work and communications of the Steering Committee and Priority Strategy Committees	L: Executive Committee P: Steering Committee	September 2018	- Steering Committee and Priority Steering Committee members agree to serve for three years of plan	Facilitator secured
	Convene meetings of the committees to discuss and implement the plan's recommendations; track progress on the action plans; and report annually on outcomes	L: Facilitator P: Executive Committee, Steering Committee, Priority Strategy Committees	Annually, hold 4 Steering Committee meetings and an average of 4 meetings for the priority strategy committee	- 75% committee members participate in meetings - Lively and useful meetings discussions - Timely communications to committees - Annual report disseminated - Plan revised if needed	- Timelines are met - # of identified measures of success achieved

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## MOVING FROM PLANS TO IMPLEMENTING ACTION

The *Kaua'i Tourism Strategic Plan* is intended to be dynamic, open to revision when needed. The committee volunteers and strategic priority partners will be responsible for moving this plan forward and their continuing commitment is vital to its success. Specific targets for each measure in the action plans will be developed in Year 1 of the plan and progress toward those targets will be reported annually.

The committees will need facilitation and communications support to convene the groups, set agendas, document decisions and progress, monitor and report on progress and assist the groups in adjusting strategies as needed. There will also be a need to secure broad support from elected officials, relevant agencies, the visitor industry at large and the community, which will require ongoing communications. There may be a need to secure resources to support specific actions in the plan.

The success in implementing a plan such as this is limited only by the wisdom, understanding and commitment of those involved. It is now up to the visitor industry and their partners to embrace that challenge.

## APPENDICES

- A. KTSP Planning Committee Members
- B. Participants in Community Association Input and Feedback Sessions
- C. Acronyms and Abbreviations
- D. References

## APPENDIX A. KTSP PLANNING COMMITTEE MEMBERS

### Executive Committee

Nalani Brun, Economic Development Specialist IV-Tourism, County of Kauaʻi Office of Economic Development

George Costa, Director, County of Kauaʻi Office of Economic Development

Sue Kanofo, Executive Director, Kauaʻi Visitors Bureau

### Steering Committee

Jim Braman, General Manager, The Cliffs at Princeville

Katy Britzmann, Director of Sales, Grand Hyatt Kauaʻi Resort & Spa

Nalani Brun, Program Administrative Officer/Tourism Specialist, County of Kauaʻi Office of Economic Development

Pamai Cano, Director of Human Resources, Kōloa Landing Resort

Amy Chun, Kauaʻi Grown Member, Kauaʻi County Farm Bureau

George Costa, Director, County of Kauaʻi Office of Economic Development

Robert Crowell, Harbors District Manager, Kauaʻi, Hawaiʻi Department of Transportation - Harbors Division

Sue Kanofo, Executive Director, Kauaʻi Visitors Bureau

Jody Kono-Kjeldsen, Executive Director, Poʻipū Beach Resort Association

AnaStasia Lytle, District Superintendent-Kauaʻi, Department of Land & Natural Resources, State Parks Division

Cesare "Ce" Lucente, General Manager, Outfitters Kauaʻi

Karen Ono, Executive Director, Kauaʻi Board of Realtors

Mark Perriello, President & CEO, Kauaʻi Chamber of Commerce

Laura Richards, General Manager, Hanalei Colony Resort

Neill Sams, Board Member, Kapaʻa Business Association

Samira Siale, Account Manager-Kauaʻi, Enterprise Holdings

Peter Sit, General Manager, Pono Kai Resort

Lee Steinmetz, Multimodal Transportation Planner, Kauaʻi County Planning Department

Melissia Sugai, Kauaʻi Made Program Manager, County of Kauaʻi Office of Economic Development

Ben Sullivan, Sustainability & Energy Coordinator, County of Kauaʻi Office of Economic Development

Candace Tabuchi, Assistant Professor, Hospitality & Tourism, Kauaʻi Community College

Paul Toner, General Manager, Kauaʻi Marriott Beach & Resort Club

Denise Wardlow, General Manager, Westin Princeville Ocean Resort Villas - CHAIR

Marie Williams, Long-Range Planner, County of Kauaʻi Planning Department

## Priority Strategy Committees

### Sustainable Tourism Committee

Jim Braman, General Manager, The Cliffs at Princeville  
Katy Britzmann, Director of Sales, Grand Hyatt Kaua'i Resort & Spa  
Nalani Brun, Program Administrative Officer/Tourism Specialist, County of Kaua'i Office of Economic Development  
Sue Kanoho, Executive Director, Kaua'i Visitors Bureau  
Mark Perriello, President & CEO, Kaua'i Chamber of Commerce  
Rayne Regush, Chair, Wailua-Kapa'a Community Association  
Laura Richards, General Manager, Hanalei Colony Resort  
Ben Sullivan, Sustainability & Energy Coordinator, County of Kaua'i Office of Economic Development  
Paul Toner, General Manager, Kaua'i Marriott Beach & Resort Club  
Denise Wardlow, General Manager, Westin Princeville Ocean Resort Villas

### Employee Development Committee

Ka'eo Bradford, Workforce Investment Act Administrator, Kaua'i Workforce Development Board  
Sue Kanoho, Executive Director, Kaua'i Visitors Bureau  
Peggy Lake, Training Coordinator, Kaua'i Community College-OCET  
Adele Manera, Branch Manager-Kaua'i, Workforce Development Division, Department of Labor  
Marion Paul, Kaua'i Planning & Action Alliance/Keiki to Career  
Mark Perriello, Executive Director, Kaua'i Chamber of Commerce  
Samira Siale, Account Manager-Kaua'i, Enterprise Holdings  
Peter Sit, General Manager, Pono Kai Resort  
Cheryl Stiglmeier, Training Coordinator, Kaua'i Community College-OCET  
Dawn Taba, Instructional Coach, Kaua'i High School  
Candace Tabuchi, Assistant Professor-HOST, Kaua'i Community College - CHAIR

### Traffic and Transit Committee

Nalani Brun, Program Administrative Officer/Tourism Specialist, County of Kaua'i Office of Economic Development  
Bob Crowell, HDOT, Harbors Division, Hawai'i Department of Transportation  
Larry Dill, District Engineer-Kaua'i, Highways Division, Hawai'i Department of Transportation  
Sue Kanoho, Executive Director, Kaua'i Visitors Bureau  
Jody Kono-Kjeldsen, Executive Director, Po'ipū Beach Resort Association  
Michael Moule, Chief of Engineering, County of Kaua'i Public Works Department  
Mark Perriello, President & CEO, Kaua'i Chamber of Commerce

Laura Richards, General Manager, Hanalei Colony Resort  
Neill Sams, Board Member, Kapa'a Business Association  
Lee Steinmetz, Multimodal Transportation Planner, Kaua'i County Planning Department  
Ben Sullivan, Sustainability & Energy Coordinator, County of Kaua'i Office of Economic Development

### **Natural and Cultural Environment Committee**

Nalani Brun, Program Administrative Officer/Tourism Specialist, County of Kaua'i Office of Economic Development  
Alan Carpenter, Deputy Director, Department of Land and Natural Resources, State Parks Division  
George Costa, Director, County of Kaua'i Office of Economic Development  
Sue Kanofo, Executive Director, Kaua'i Visitors Bureau  
Cesare "Ce" Lucente, General Manager, Outfitters Kaua'i - CHAIR  
AnaStasia Lytle, Superintendent-Kaua'i, Department of Land and Natural Resources, State Parks Division  
Nancy McMahon, Park Planner, County of Kaua'i Department of Parks & Recreation  
Laura Richards, General Manager, Hanalei Colony Resort  
Victoria Wichman, Interpretive Specialist and Archeologist, Department of Land and Natural Resources, State Parks Division

### **Communications Committee**

Nalani Brun, Program Administrative Officer/Tourism Specialist, County of Kaua'i Office of Economic Development  
Pamai Cano, Director of Human Resources, Kōloa Landing Resort  
Larry Feinstein, Operations Liaison, Timbers Kaua'i  
Sue Kanofo, Executive Director, Kaua'i Visitors Bureau  
Joy M. Koerte, Partner, Fujita & Miura Public Relations  
Veronica Lovesy, Senior Marketing Manager, Kukui'ula Development Co.  
Jan TenBruggencate, Writer, Island Strategy LLC  
Beth Tokioka, Communications Manager, KIUC

## APPENDIX B. COMMUNITY/NEIGHBORHOOD ASSOCIATION FOCUS GROUP PARTICIPANTS

Beryl Blaich, Vice President, Kilauea Neighborhood Association  
Nalani Brun, Program Administrative Officer, County of Kaua'i OED  
Andy Bushnell, Board Member, Wailua-Kapa'a Neighborhood Association  
Jeri Di Pietro, President, Kōloa Community Association  
Rory Enright, General Manager, Princeville Community Association  
Yoshio L'Hote, President & CEO, Kilauea Neighborhood Association  
Laurie Quarton, Member, Community Coalition Kaua'i  
Rayne Regush, Chair, Wailua-Kapa'a Neighborhood Association  
Julie Schuller, Director, Princeville Community Association  
Tom Southwick, Member, Princeville Community Association  
Jean Souza, Facilitator/ Volunteer, Hanapepe- Ele'ele Community Association  
Wayne Souza Member, Hanapepe-'Ele'ele Community Association  
Ken Taylor, Board Member, Kaua'i Hui for a Sustainable Future  
Carol Volker, Board member, Wailua-Kapa'a Community Association  
Anne Walton, Member, Community Coalition Kaua'i

## APPENDIX C. ACRONYMS AND ABBREVIATIONS

CoC	Kaua'i Chamber of Commerce
CoK	County of Kaua'i
DBEDT	Department of Business, Economic Development and Tourism, State of Hawai'i
DLIR	Department of Labor and Industrial Relations, State of Hawai'i
DLNR	Department of Land and Natural Resources, State of Hawai'i
DOE	Department of Education, State of Hawai'i
GHG	Greenhouse gas
HDOT	Department of Transportation, State of Hawai'i
HGG	Hawai'i Green Growth Initiative
HLTA	Hawai'i Lodging and Tourism Association
HOST	Hospitality and Tourism Program, Kaua'i Community College
HTA	Hawai'i Tourism Authority
HTASP	Hawai'i Tourism Authority Strategic Plan
HVCB	Hawai'i Visitors and Conventions Bureau
KBA	Kapa'a Business Association
KCC	Kaua'i Community College
KEDB	Kaua'i Economic Development Board
KIUC	Kaua'i Island Utility Cooperative
KPAA	Kaua'i Planning & Action Alliance
KTSP	Kaua'i Tourism Strategic Plan
KVB	Kaua'i Visitors Bureau
LEI	Lead, Expose and Inspire Program/ClimbHI
Nat. & Cult. Env. Cte	KTSP Natural and Cultural Environments Committee
NHCC	Kaua'i Native Hawaiian Chamber of Commerce
NSBC	North Shore Business Council
NS Comm. Assn.	North Shore Community Association
OCET	Office of Continuing Education & Training, Kaua'i Community College
OED	Office of Economic Development, County of Kaua'i
Parks & Rec	Parks and Recreation Department, County of Kaua'i
PBRA	Po'ipū Beach Resort Association
RCCA	Royal Coconut Coast Association
SRTP	Short-Range Transportation Plan
SC	KTSP Steering Committee
Sust. Tour. Cte.	Sustainable Tourism Committee

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