



EXECUTIVE SUMMARY

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 overtourism¹ 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:

¹ 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 Tourism²
- ◆ 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.

² 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 72,159,³ 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

³ 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)⁴
- ◆ 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

⁴ 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 management⁵ 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.

⁵ 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.

*For additional information on the
Kaua'i Tourism Strategic Plan, contact:*

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