

# Kaua`i Tourism Strategic Plan Update Advisory Group Meeting 3 – January 9, 2015



KAUAI PLANNING & ACTION ALLIANCE

# Agenda

- Welcome and Introductions
- Review Agenda
- Review November 7, 2014 Meeting Notes
- Framework for Planning to 2018 – Part 2
- Review visitor industry information and projections from other reports
  - Discuss anticipated impacts of current and emerging visitor industry issues, concerns and opportunities
  - Review, and update if needed, the Kaua`i Tourism Strategic Plan vision (2006)
  - Revisit and discuss highest priority issues for next three years
- Next Meeting Date (Tentative) – **Friday, March 13, 2015, 2:00 to 4:00 PM**, Location to be announced

# Project Purpose (Sept. 2014-June 2015)

Draw on the expertise of an Advisory Group and visitor industry stakeholders to:

- assess progress made toward implementing the *Kaua`i Tourism Strategic Plan 2006-2015*
- determine applicability of the plan's priority strategies
- develop and secure support for a revised set of priority strategies
- prepare a strategic plan update report for Kaua`i for the period 2015 to 2018.

# Advisory Group Meeting Protocols

- Advisory Group decisions will be by consensus of those present at scheduled meetings, with votes taken only if there is no consensus \*
- Advisory Group members can designate a colleague to attend in their place, if necessary, with advance notification to KPAA; Advisory Group member will brief colleague in advance, as meeting time will not be used to do so
- Advisory Group members agree to prepare for meetings by reading materials in advance and will arrive on time
- To avoid wasting paper, meeting materials will be printed for Advisory Group only on request
- Advisory Group members will turn cellphones off or on vibrate at meetings

\*Consensus = Everyone in the group can live with the decision, even if it is not their first choice



# Quick Review

# Ranking of Visitor Industry Objectives

1. To contribute to the preservation and enhancement of the natural resources on Kauaʻi, including land and ocean.
2. To maintain and improve visitor satisfaction with their experience on Kauaʻi.
3. To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of this culture.
4. To make positive contributions to the quality of life for residents. (tie)
5. To increase the economic contribution of the visitor industry to Kauaʻi. (tie)
6. To increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.
7. To establish a process for ensuring Kauaʻi County TSP implementation and coordination with other county and state plans. Develop a mechanism to track plan objectives, regularly review scorecards, and make revisions as necessary.

# Emerging Issues Impacting Tourism

- GMOs
- Positive and negative impacts of social media,
- TAT
- Culture
- Environment
- Smart phones replacing tour guides and translators,
- Airbnb rentals
- Homelessness
- Others?



# Framework for Planning – Part II



TABLE 1. TOTAL VISITORS BY AIR

	NOVEMBER			YEAR-TO-DATE		
	2014P	2013	% CHANGE	2014P	2013	% CHANGE
TOTAL VISITORS	629,048	609,049	3.3	7,407,132	7,299,878	1.5
Domestic	411,568	400,511	2.8	4,973,543	4,943,584	0.6
International	217,480	208,538	4.3	2,433,589	2,356,294	3.3
VISITOR DAYS	5,617,167	5,469,043	2.7	67,392,745	67,010,430	0.6
AVERAGE DAILY CENSUS	187,239	182,301	2.7	201,775	200,630	0.6
TOTAL AIR SEATS	887,913	863,617	2.8	9,205,719	9,931,660	-7.3
TOTAL LOAD FACTOR (%)	83.9	82.9	0.9	85.9	87.4	-1.4
ISLANDS VISITED						
Kaua'i	82,105	81,961	0.2	1,012,649	1,022,695	-1.0
Kaua'i only	45,034	45,209	-0.4	537,332	547,058	-1.8
Kaua'i one day or less	9,107	8,275	10.0	100,554	97,721	2.9

# Kauai CY2013 Stats

## **CY 2013 Annual Visitor Research Report - Kauai**

- Visitor expenditures on Kaua'i totaled \$1.4 billion, up 7.8 percent.
- Arrivals to Kaua'i grew 2.7 percent to 1,114,354 visitors.
- Combined with a longer average length of stay (7.64 days, from 7.53 days in 2012), visitor days rose 4.3 percent to 8,516,938. In 2013, 13.9 percent of air visitors went to Kaua'i, similar to 2012.

## **Page 82-83 / Kaua'i Supplement of the Annual Visitor Research Report**

- Arrivals by air to Kaua'i rose 2.7 percent to 1,114,354 visitors in 2013 (Table 59). Kaua'i visitor days
- increased 4.3 percent.
- Over half (53.6%) of these visitors stayed exclusively on Kaua'i.
- The average daily census increased 4.6 percent from 2012 to 23,334 visitors present.

# Kauai CY2013 Stats - 2

- Figure 17: Kaua'i Visitor Arrivals by Selected MMA
- 2001 – 2013
- The largest share of Kaua'i's visitors continued to be from U.S. West (51.1%), followed by U.S. East (30.6%), Canada (6.2%), Oceania (2.9%), Europe (2.8%), Japan (2.6%) and Other Asia (1%)

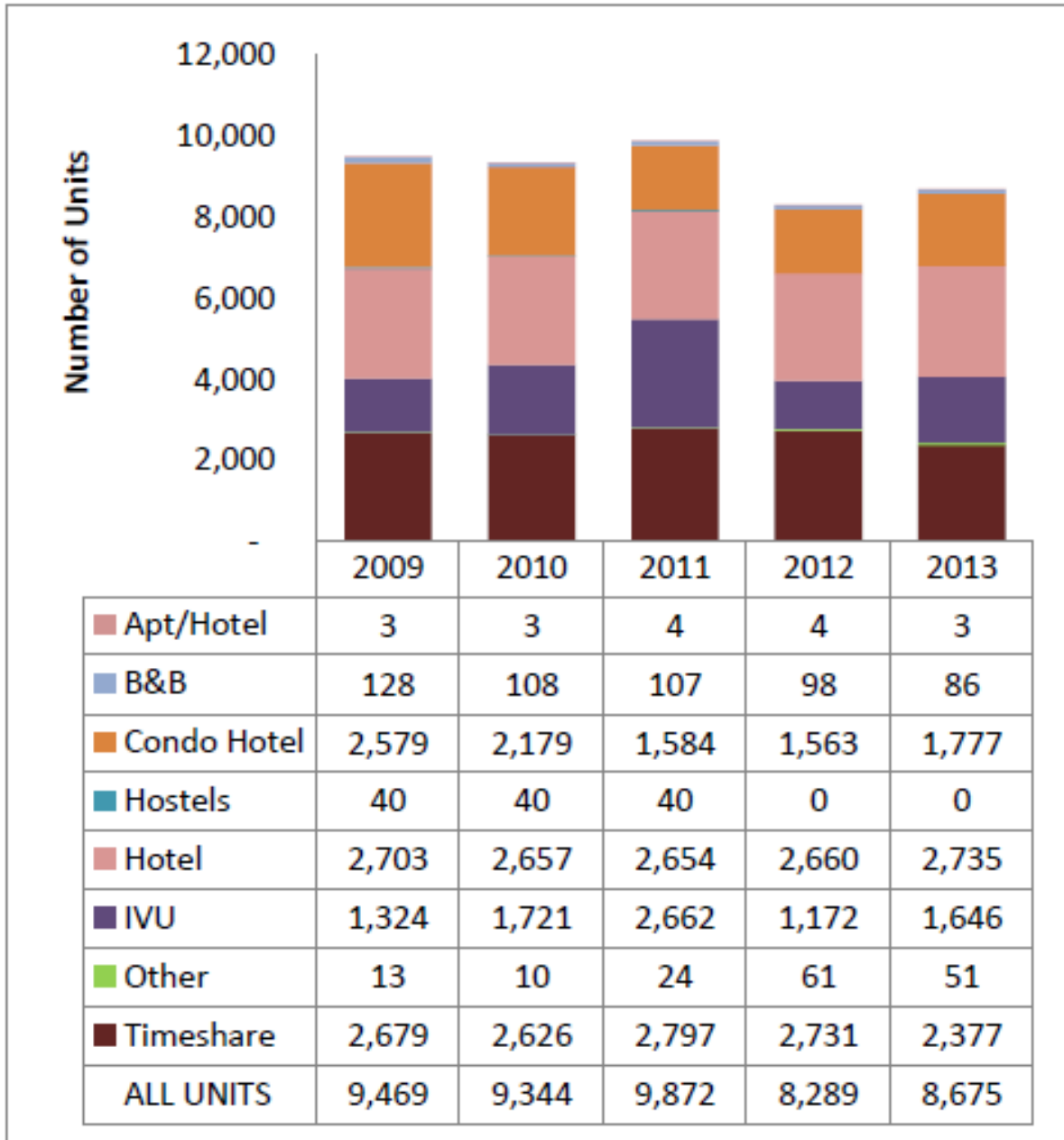
# Kauai CY2013 Stats - 3

- (Table 65).
- Significantly more visitors from emerging markets including Australia (+33%), New Zealand (+107.3%) and Korea (+102.1%) went to Kaua'i than in 2012. Arrivals to Kaua'i from U.S. West (+2.8%), Japan (+5.5%) and Canada (+4.9%) also increased.
- There were more visitors to Kaua'i from Los Angeles (+6.2%), New York (+6.2%) and Seattle (+3.4%) but fewer visitors from San Jose (-11.4%), San Francisco (-5%) and Chicago (-4.7%) compared to 2012 (Table 49 and Table 50).

# Kauai CY2013 Stats - 4

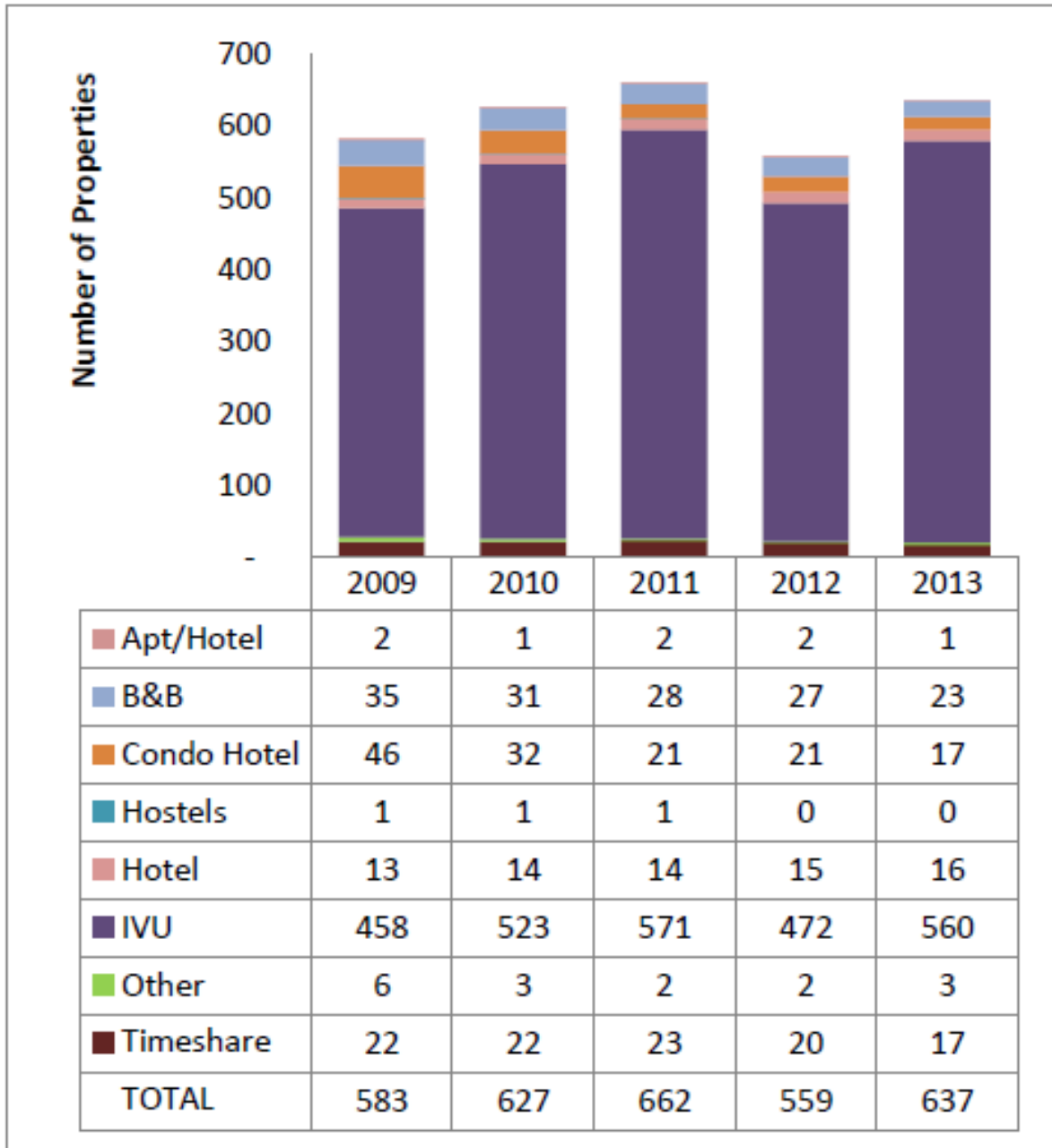
- Repeat visitors accounted for 70.3 percent while 29.7 percent were first-timers in 2013.
- Three out of four (75.8%) Kaua'i visitors were independent travelers, similar to 2012.
- Half (50.8%) of those who visited Kaua'i stayed in hotels while in the state. Some stayed in condominium properties (23.1%), timeshare properties (19.6%), and rental homes (11.3%).
- Usage of rental homes (+9%), condominium properties (+6.9%) and hotels (+2.1%) by Kaua'i visitors were higher compared to 2012.
- Most of the visitors were in the state for vacation (85.1%); 6.3 percent visited friends or relatives; 6.2 percent honeymooned; and 4 percent came for meetings, conventions, and incentives.

**Figure 9: Kaua'i – Inventory by Unit Type**



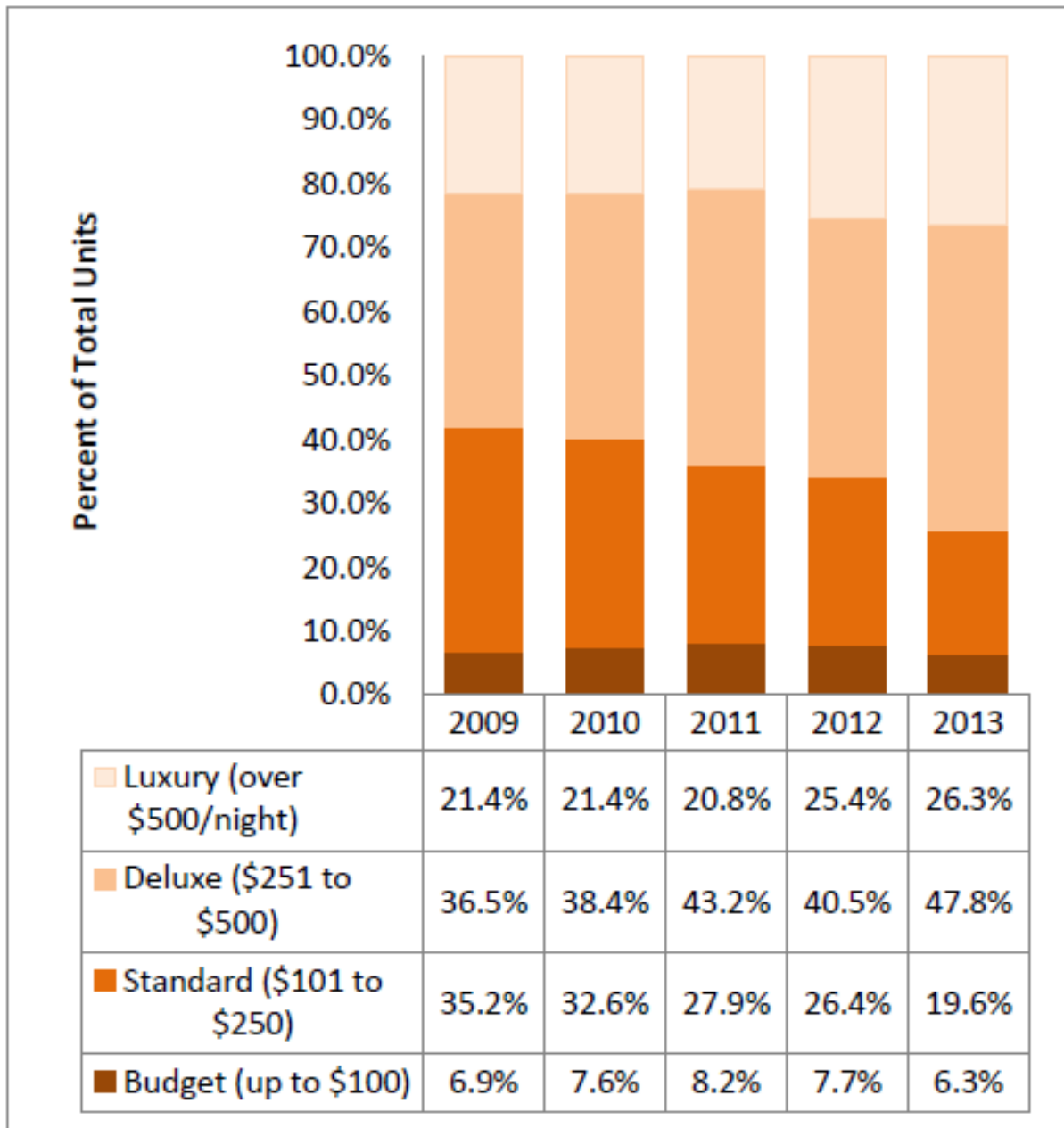
Source:  
HTA 2013  
Visitor Plant  
Inventory

Figure 10: Kaua'i – Inventory by Property Type



Source:  
HTA 2013  
Visitor Plant  
Inventory

**Figure 11: Kaua'i – Inventory by Price Class**



Source:  
HTA 2013  
Visitor Plant  
Inventory



**Table 1: Total Number of Individually Advertised Units in 2014**

Island	Number of Individually Advertised Units	Total Estimated Number of Bedrooms	Estimated Number of Visitors that Could Be Accommodated
Hawai'i	4,986	11,155	28,106
Kaua'i	3,614	7,466	19,481
Lāna'i	22	57	133
Maui	8,840	15,113	43,877
Moloka'i	365	605	1,676
O'ahu	4,411	9,103	24,334
State of Hawai'i	22,238	43,499	117,607

Source: HTA report on Individually Advertised Units in Hawaii (Vacation Rentals), December 2014

**Table 2: Density, Ratio of Individually Advertised Units to Housing Stock in Hawai'i, 2014**

Island	Total Number of Individually Advertised Units	Total Number of Housing Units*	Ratio of Individually Advertised Units to Total Housing Units <sup>2</sup>
Hawai'i	4,986	82,323	6.1
Kaua'i	3,614	28,790	12.6
Lāna'i	22	1,545	1.4
Maui	8,840	65,232	13.6
Moloka'i	365	3,312	11.0
O'ahu	4,411	306,622	1.4
State of Hawai'i	22,238	487,824	4.6

Source: HTA report on Individually Advertised Units in Hawaii (Vacation Rentals), December 2014

**Table A-2: Kaua'i Individually Advertised Units by Zip Code**

Kaua'i				
City/Area	Zip Code	Individually Advertised Units	Housing Units	Individually Advertised Units per 100 Housing Units
Kōloa	96756	1,286	3,247	39.6
Princeville	96722	947	2,464	38.4
Hanalei	96714	355	959	37.0
Anahola	96703	80	899	8.9
Kapa'a	96746	635	8,134	7.8
Kīlauea	96754	103	1,706	6.0
Kekaha	96752	55	1,382	4.0
Waimea	96796	22	887	2.5
Līhu'e	96766 / 96715	97	5,296	1.8
Makaweli	96769	3	185	1.6
Kealia	96751	1	69	1.4
Lāwa'i	96765	3	210	1.4
Kalāheo	96741	26	2,370	1.1
Hanapēpē	96716	1	982	0.1

Source: HTA report on Individually Advertised Units in Hawaii (Vacation Rentals), December 2014



# Review and grouping of priority issues

# TSPUAG Meeting Schedule

## Dates to be Determined

- Friday, March 13, 1-4 PM, Piikoi AB
- Friday, April 10, 1-4 PM, Lihue Public Library Meeting Room
- May 2015 (2 hours, TBD)

- Website for meeting materials:

<http://www.kauainetwork.org/programs/tourism-strategic-plan-advisory-group/>



# Quick Assessment of Meeting

# Diane Zachary

Work 632-2005

Cell 482-1588

[dzachary@kauainetwork.org](mailto:dzachary@kauainetwork.org)

[www.kauainetwork.org](http://www.kauainetwork.org)



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2959 Umi Street, Suite 201

Lihu'e, HI 96766