



**KAUA'I TOURISM
STRATEGIC PLAN UPDATE
2016 - 2018**



*Prepared for the County of Kaua'i by
Kaua'i Planning & Action Alliance, Inc.*

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KAUA'I TOURISM STRATEGIC PLAN UPDATE 2016-2018

(July 1, 2015 - June 30, 2018)



Prepared for

County of Kaua'i
Office of Economic Development
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July 2015

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Message from Mayor Bernard P. Carvalho, Jr.

Aloha!

With the arrival of the first settlers from Polynesia, Hawai'i began its long history of welcoming visitors. From majestic mountains to beautiful beaches and stunning vistas, Kaua'i offers a "paradise" like nowhere else in the world. It is our responsibility to continue to create a viable economy for our people, while maintaining all that makes Kaua'i unique and special.

On the heels of Kaua'i's current Tourism Strategic Plan, we find ourselves in an upswing, with a growth in the numbers of visitors and direct flights to our island. We are also experiencing a shift in the visitor accommodations market, with a significant increase in Timeshare, Transient Vacation Rentals and Bed and Breakfast offerings. In tune with that is our need to update our infrastructure in order to accommodate a growing visitor industry. We do not soon forget the lessons learned in the aftermath of Hurricane 'Iniki, and the importance of this industry to our economy and livelihood of our island people.

I want to thank the Advisory Committee and all those that have contributed to this update to the Kaua'i Tourism Strategic Plan. The initiatives in this plan seek to find balance between supporting a sustainable economy while honoring the heritage of Kaua'i's first people, enhancing the quality of life for our residents, and protecting our natural and cultural resources. This requires mutual respect and partnership among all those involved.

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 2016-2018.

Me Ke Aloha Pumehana,

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



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Executive Summary

The *Kaua'i Tourism Strategic Plan Update 2016-2018* reflects the desires and input of Kaua'i's tourism stakeholders in both the private and public sectors. The development of the plan was guided by a 20-member Advisory Group that met seven times between September 2014 and June 2015. Stakeholder input was gathered through a survey at the launch of the planning process and, prior to publication, at a forum where the draft plan was presented and feedback was solicited.

Challenges and Opportunities

Kaua'i offers visitors a rural and natural experience with a mix of accommodations to meet many needs. The following are unique challenges and opportunities facing the "Garden Isle."

In 2014, Kaua'i received 1,113,605 visitors, who stayed an average of 7.71 days and spent \$171 per day. Of these, 70% were returning visitors while 30% were new. Three out of four were independent travelers. The average visitor count per day is 23,536. The U.S. west coast remains the primary source of visitors to Kaua'i. Small but growing visitor markets are Canada, Europe, Oceania, Other Asia and Latin America.

About half of Kaua'i visitors stay in hotels, and the remainder stay in condos, timeshares and rental homes. The share staying in rental homes, which may include homestays and transient vacation rentals, is growing. Many of these rental homes lack property permitting. A recent study showed that Kaua'i has 3,614 individually advertised units, nearly double the number that had been anticipated. The great majority of these homes are in Kōloa, Hanalei and Princeville.

Kaua'i's tourism growth – and resident quality of life – is impacted by the need for infrastructure improvements to handle traffic and congestion. On a monthly basis, the visitor count fluctuates significantly. When the daily visitor count is over approximately 25,000, the island's roads, parks, beaches and other infrastructure, in their current conditions, are taxed and the visitor experience and resident quality of life diminish. There is interest in managing the "peaks and valleys" in the visitor count. The peaks typically occur in mid-June to August and during the winter holidays and have reached well over 26,000 per day. Until the island's infrastructure, including bus and shuttle service, is improved, the desirable range of visitors per day is within the range of 23,000 to 25,000.

In 2015, Kaua'i lost all competitors for inter-island flights, leaving only Hawaiian Airlines. This translates to a decrease in available seats and higher prices for visitors and residents.

Kaua'i is marketed as a destination for relaxation and rejuvenation, and it becomes the island's challenge to live up to that promise. For those who visit Kaua'i for a unique cultural experience, the visitor industry wants to offer an authentic Hawaiian cultural experience. This means that staff need to be knowledgeable about Hawaiian culture and adequately trained.

Social media is transforming how visitors access and share information, which can have great benefit yet also means that negative experiences can be broadcast worldwide almost instantaneously. Crime and visitor safety continue to be critical issues, with property crimes, such as car break-ins, theft and water safety, being the principal concerns.

A Plan Based on Balance

This plan promotes the concept of economic, social, and environmental balance. A healthy visitor industry and a population that enjoys a good quality of life are inextricably linked. Finding and maintaining this balance is a challenging and evolving effort. This balanced approach is reflected in this vision for tourism:

Tourism on Kaua'i will:

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

The values underlying the Kaua'i Tourism Strategic Plan resonate in the island's vision for tourism, and throughout the plan, filtering through goals, objectives, strategies, and priorities. Kaua'i visitor industry stakeholders clearly understand that a healthy land nourishes healthy people; stated in the Hawaiian language, "*Ola ka 'Aina, Ola ke Kanaka*" (Healthy Land, Healthy People). When there is focus on the people and island of Kaua'i, everything will be *pono* or right.

The six equally important major objectives to achieve this vision are:

- To make positive contributions to the quality of life for residents.
- To increase the economic contribution of the visitor industry to Kaua'i.
- To increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.
- To maintain and improve visitor satisfaction with their experience on Kaua'i.
- To reinforce authentic Native Hawaiian culture and local Kaua'i culture, the foundations of our unique sense of place.
- To contribute to the preservation and enhancement of the natural resources on Kaua'i, including land and ocean.

The seventh objective is to ensure the plans developed are implemented appropriately. To support this effort, an implementation oversight committee will be developed to ensure action plans are developed, progress is monitored and changes are recommended as appropriate.

Each objective is supported by major strategies and scorecard measures. These strategies were determined as important by the Kaua'i TSPU Advisory Group to be achieved, at least in large part, within the next three years. There are ten strategies identified as absolutely essential to complete by 2018, and these are identified in the plan by with a red number. These are the strategies that, if further prioritization is required, will be considered at the top of the list. The ten priority strategies include:

- #1 1.b. Support traffic management systems to address and reduce traffic congestion and improve pedestrian safety, which might include: developing feeder roads to mitigate traffic; improving street design and town centers; developing bus and shuttle service from airport to resort areas and within resort areas; and creating pedestrian networks in resort areas.
- #2 2.b. Support career preparation programs to attract new employees, especially local residents, to the visitor industry to ensure an available, well-qualified workforce,
- #3 2.e. Advocate for lifting the cap on existing Transient Accommodation Tax (TAT) funds distributed to counties, thus increasing the allocation to Kaua'i for services and infrastructure that support the island community.
- #4 1.a. Advocate for significant progress and/or completion of essential infrastructure improvements, including: congestion relief routes in Kapa'a; traffic circulation improvements for north and south Kaua'i; implementation of Koke'e and Ha'ena State Park Master Plans; and cruise ship harbor improvements.
- #5 3.a. Encourage two-way communications among residents, Native Hawaiians and the visitor industry to increase understanding of the visitor industry and local Kaua'i culture and their collective value to the island's economy.
- #6 5.a. Increase awareness of the Hawaiian culture among residents of all ages and the visitor industry, including employees and employers, such as by: encouraging guidance from respected Hawaiian cultural advisors and practitioners on Kaua'i to ensure that what is perpetuated is authentic for Kaua'i; encouraging the proper use of the Hawaiian language; and integrating Hawaiian culture into ongoing visitor industry training.
- #7 1.e. Support adequate funding and staffing for capital improvements, including maintenance and enforcement for public parks, trails and recreation areas.
- #8 1.f. Support the development of regulations and the administrative structure to appropriately identify, monitor and enforce homestays (Bed & Breakfasts) and Individual Vacation Units (homes and condos) and report the annual number of visitors staying in these accommodations.
- #9 2.d. Encourage the visitor industry, airlines and the growing cruise line industry, to buy and promote Kaua'i products and support businesses on Kaua'i.
- #10 1.d. Support the development and promotion of community-driven programs that reinforce the unique sense of place of communities, such as those with historical and/or cultural significance.

To track progress in implementing the strategies and their effectiveness in creating change toward the objective, the Advisory Group selected measures related to each objective. The measures were selected because they are meaningful and currently available.

I. Introduction and Background

A. Introduction

As it has been since the decline of the sugar industry, tourism continues to be the major economic driver on Kaua'i. According to economist Paul Brewbaker in a report for First Hawaiian Bank, "Among all the islands, Kaua'i is most dependent on the visitor sector — especially Mainland tourists and time-share properties — for its economic well-being."¹

The report continues, "As is the case with other Neighbor Islands, Kaua'i's economy is benefiting from a strong recovery of tourism, which will continue to grow, though the growth rates of arrivals and spending will level off as we move into 2014 and 2015."² In 2014, tourism contributed \$ 1.35 billion in direct visitor spending to Kaua'i's economy and supported some 15,800 jobs.³

Visitors are drawn to Kaua'i for the beautiful environment, casual lifestyle, rich culture and outdoor activities. To ensure a vital, competitive, and sustainable visitor industry, benefiting both residents and visitors, this *Kaua'i Tourism Strategic Plan Update 2016-2018 (Kaua'i TSPU)* has been developed with stakeholder input.

B. Background

This document is an update to Kaua'i's first strategic plan, The Kaua'i County Tourism Strategic Plan 2006-2015 (Kaua'i TSP) developed in 2005 and 2006. 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, and many others in the public and private sectors. Additionally, numerous plans, like the 2000 Kaua'i General Plan, news articles, reports, data, research, and other related information, were reviewed and considered in the development of that plan.

Upon completion of the Kaua'i TSP 2006-2015, and during its first year, a Kaua'i TSP Implementation Committee met to encourage and monitor action on the plan's strategies and objectives. When funding for that collaborative work ended, individual businesses and organizations undertook work on aspects of the plan but those efforts were neither coordinated nor reported. After a few years, some in the industry became unaware of the plan.

In 2014, the County of Kaua'i Office of Economic Development secured funds to update the 2006 plan. The purpose of the update is to 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

¹ First Hawaiian Bank Economic Forecast 2013-2014

² *Ibid.*

³ Data provided by Daniel K. Nahoopii, Director of Tourism Research, Hawai'i Tourism Authority, via email to OED July 9, 2015.

- develop and secure support for a revised set of priority strategies
- prepare a strategic plan update report for Kaua'i for the period 2016 to 2018

A three-year planning framework, covering 2016 to 2018 (three fiscal years, July 1, 2015 to June 30, 2018) was chosen in order to be more responsive to current and emerging conditions. The Mayor appointed a 20-member Advisory Group to update the plan. Kaua'i Planning & Action Alliance was contracted to facilitate the Advisory Group's work and prepare the plan.

C. Kaua'i Tourism Strategic Plan Update 2016-2018 Planning Process

The TSPU Advisory Group began meeting in September 2014. In order to assess the impact of the previous plan on the visitor industry and identify current and emerging issues and trends, they directed that a survey of key visitor industry stakeholders be conducted in November 2014.

The Advisory Group met a total of seven times.⁴ In preparing this *Kaua'i Tourism Strategic Plan Update 2016-2018*, the group considered:

- input from the stakeholder survey,
- current reports on visitor satisfaction and resident sentiments,
- technical studies on socioeconomic and land use prepared for the General Plan update,
- visitor industry data and projections, and
- industry issues and local, national and international trends.

The strategies in the previous plan were updated and prioritized. The updated draft plan was presented to industry stakeholders at a June 16, 2015 session. Based on stakeholder feedback, final adjustments to the plan were made.

⁴ Sept. 19, 2014; Nov. 7, 2014; Jan. 9, 2015; Mar. 13, 2015; Apr. 10, 2015; May 20, 2015; June 26, 2015.

II. Overview of Kaua'i Tourism

In the development of this plan, the past, present and anticipated future of tourism on Kaua'i were considered. What follows is a summary of the information gathered from reports, studies, a survey of industry stakeholders and discussion by the Kaua'i Tourism Strategic Plan Update Advisory Group.

A. A Need for Balance

A key issue facing the Kaua'i visitor industry is the significant fluctuation throughout the year in the number of visitors. When the daily visitor count is over approximately 25,000, the island's roads, beaches and other infrastructure, in their current conditions, are taxed and the visitor experience and resident quality of life diminish. There is interest in managing the "peaks and valleys" in the visitor count. The peaks typically occur in mid-June to August and during the winter holidays. As an example of a recent peak, in December 2014 the daily visitor count reached 26,170⁵, with a corresponding increase in visitor complaints.

Until there is improvement in the island's infrastructure, the desirable range of visitors per day is within the range of 23,000 to 25,000, thus leveling out the valleys and peaks. The objectives and strategies that follow are mindful of this need for a balance of visitors throughout the year.

B. Visitor Demographics

The 2007 peak in Kaua'i tourism (1.3 million) was eroded by the recession that began in 2008. Visitor counts have been steadily increasing since 2010 and in 2014 reached 1.1 million.

The following facts from a recent Hawai'i Tourism Authority report⁶ offer a useful overview of Kaua'i tourism in 2013.

- Arrivals to Kaua'i grew 2.7 percent to 1,114,354 visitors.
- Visitor expenditures on Kaua'i totaled \$1.4 billion, up 7.8 percent.
- 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 Hawai'i's air visitors came to Kaua'i, similar to 2012.
- 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.
- 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%).

⁵ Hawai'i Tourism Authority, Island Highlights 2014 v. 2013, [http://www.hawaiitourismauthority.org/default/assets/File/research/monthly-visitors/Kauai\(11\).xls](http://www.hawaiitourismauthority.org/default/assets/File/research/monthly-visitors/Kauai(11).xls)

⁶ Hawai'i Tourism Authority, *CY 2013 Annual Visitor Research Report – Kaua'i*, pages 82-83.

- Significantly more visitors from emerging markets, including Australia (+33%), New Zealand (+107.3%) and Korea (+102.1%), came 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.
- Repeat visitors accounted for 70.3% while 29.7% 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.

Table 1- Longitudinal Visitor Data for Kaua'i on the following page, provides data over a 9-year period to better understand the trends in Kaua'i's visitor count and where our visitors come from.

Table 1. Longitudinal Visitor Data for Kaua'i

KAUA'I VISITOR STATISTICS ^{1 2}

	2006	2007	2008	2009	2010	2011	2012	2013	2014-P
Visitor Arrivals	1,203,264	1,299,045	1,030,647	928,112	955,112	1,011,500	1,084,681	1,114,354	1,113,605
Cruise Ship Passengers	371,376	445,069	225,582	189,641	200,362	223,559	283,109	170,987	123,071
Commercial Air Seats	412,619	358,855	425,910	422,644	450,900	520,325	592091	600,268	654,176
Charter Air Seats	19,000	18,620	NA	NA	NA	NA	NA	NA	NA
Average Visitors Per Day	20,903	22,207	19,855	18,690	19,874	20,816	22,380	23,334	23,536
Visitor Expenditures Per Person Per Day	\$161	\$167	\$169	\$147	\$149	\$155	\$159	\$163	\$171
Average Length of Stay (Days) ³	6.35	6.24	7.05	8.28	8.40	7.51	7.53	7.64	7.71

P = Preliminary Count
 NA = Not Available

ANNUAL NUMBER OF VISITORS TO KAUA'I ⁴

	2006	2007	2008	2009	2010	2011	2012	2013	2014-P
U.S. West	596,304	638,394	515,378	482,732	485,698	517,849	553,222	568,836	565,523
U.S. East	431,233	461,331	351,478	306,976	313,675	320,096	338,756	340,688	341,702
Canada	50,032	62,447	51,356	44,638	54,627	64,128	66,205	69,476	77,411
Europe	20,222	22,459	22,233	20,938	21,908	24,273	28,773	30,963	32,025
Japan	33,637	34,401	26,166	20,892	21,356	23,571	27,907	29,430	23,845
Oceania	16,008	20,655	14,605	12,142	14,789	19,304	22,807	31,777	31,850
Other Asia	4,738	7,776	6,046	4,781	4,873	7,552	7,134	10,394	10,893
Latin America	2,789	3,602	2,396	2,362	2,560	2,831	3,359	4,010	4,190

1. Hawaii'i Tourism Authority, *Annual Visitor Research Report (2005-2011)*, <http://www.hawaiiitourismauthority.org/research-reports/reports/annual-visitor-research/>
2. Hawaii'i Tourism Authority, *Visitor Highlights (December 2012)*, <http://www.hawaiiitourismauthority.org/research-reports/research/visitor-highlights/>
3. Hawaii'i Tourism Authority
4. *Ibid.*

SMS developed a Socio-Economic Forecast for the Planning Department in preparation for the County's General Plan update. The following table shows the expected resident and visitor population data between 2000 and 2020. As noted in the table, the anticipated visitor count in 2020 is 1,186,000 with an average daily census of 23,941, a 1.48% increase from 2010.

Table 2. Kaua'i County Resident and Visitor Population, 2000-2020⁷

	2000	2010	2020
Resident Population	58,463	67,091	74,693
Resident Population Annual Growth Rate	1.24%	1.39%	1.08%
Visitor Count (rounded)	1,075,000	1,033,000	1,186,000
Visitor Count Annual Growth Rate	-1.25%	-0.39%	1.48%
Average Daily Census	18,041	19,548	23,941
De Facto Population	75,200	82,101	92,485
De Facto Population Annual Growth Rate	9.93%	0.88%	1.20%

Industry stakeholders identified additional issues and trends considered in the development of this plan.

- Tourism demographics are shifting toward China and Korea, and Latin America numbers expected to jump. Overcoming language barriers and meeting customer service expectations will be a likely challenge.
- There has been an increase in Chinese hotel investors.
- More young families are visiting.
- Research shows that Kaua'i's visitor is "attracted to nature and the peaceful, immersive environment it offers. They travel to escape the busy-ness of their life at home and have little interest in urban experiences or crowds. They tend to be less active, preferring to spend long periods immersing themselves in a single experience rather than sampling a lot of variety. Relaxing on vacation is their number one priority and they don't want to feel pressured to 'see all the sights.'"⁸

C. Visitor Plant

Kaua'i range of accommodations has grown in recent years to include homestays (bed and breakfasts) and transient vacation rentals (TVRs). The Internet and social media have opened new methods of marketing, with airbnb.com, vrbo.com and others marketing alternative accommodations in lieu of more traditional hotels and timeshares. It should be noted that not all of these alternative accommodations have the proper licenses and permits, and County government has begun efforts to better regulate this type of lodging and to enforce the regulations.

⁷ SMS Research & Marketing Services, Inc., *Kaua'i General Plan Update: Socioeconomic Analysis and Forecasts*, February, 2014, compilation of data from Table 1, page 3 and Table 10, page 23.

⁸ Hawai'i Visitors and Convention Bureau, *Kaua'i Brand Study for the Island of Kaua'i - Rejuvenating*, Sept. 2011.

The following table shows the projected number of housing units on Kaua'i to 2020 based on an annual growth rate of 1.3% since 2010, along with the number of projected visitor units, based on a slightly lower annual growth rate of 1.23%.

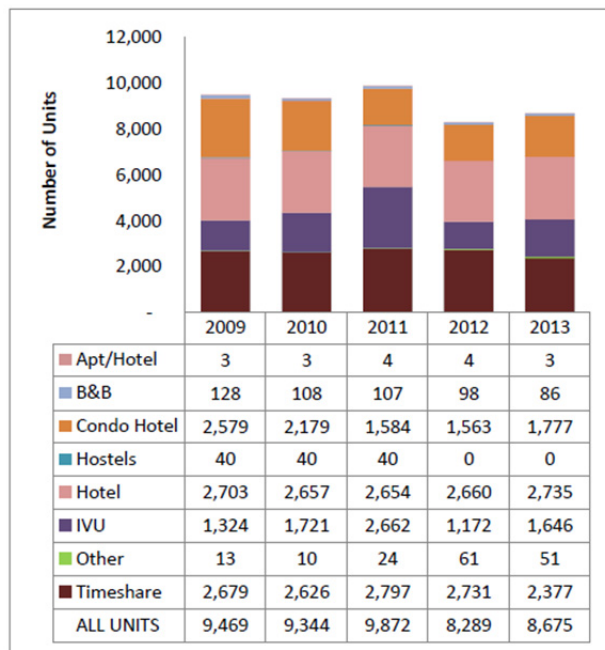
Table 3. Kaua'i County Household and Visitor Units, 2000-2020⁹

	2000	2010	2020
Number of Housing Units, Total	25,331	29,793	33,553
Number of Housing Units Annual Growth Rate	4.40%	1.80%	1.30%
Visitor Units	7,159	9,345	10,499
Visitor Units Annual Growth Rate	-0.51%	3.05%	1.23%

During TSPU Advisory Group discussion, it was noted the 10,499 visitor units anticipated by 2010 does not take into account the opening of the Coco Palms Hotel, which has already applied for building permits. Once built, this will add another 363 units to the 2020 total.

A 2013 Hawai'i Tourism Authority report provided an inventory of Kaua'i's visitor plant. The report included the following figures showing inventory by unit type (Figure 1) and inventory by price class (Figure 2). It should be noted that these figures do not appear to include a recent inventory of alternative accommodations, such as homestays (see Table 4 below).

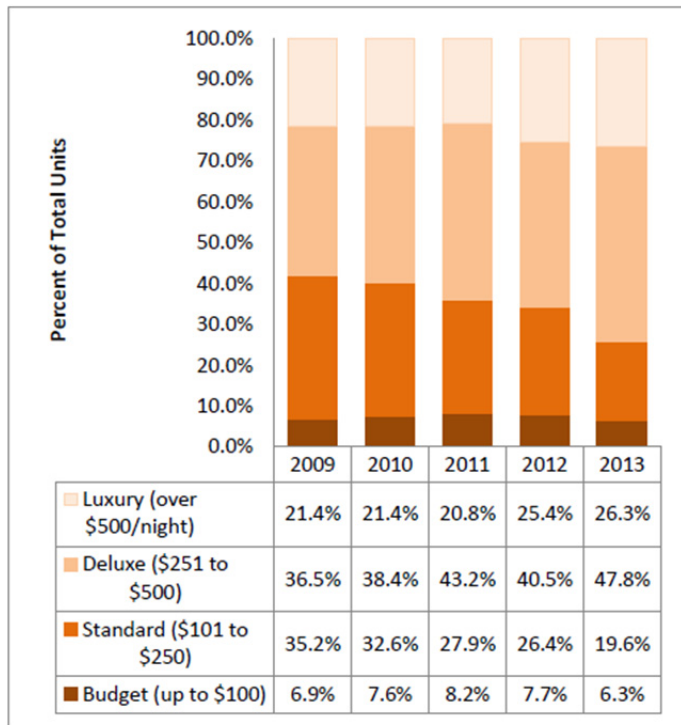
Figure 1. Kaua'i Inventory by Unit Type¹⁰



⁹ SMS Marketing & Research Services, Inc., *Kaua'i General Plan Update: Socioeconomic Analysis and Forecasts*, February, 2014, compilation of data from Table 7, page 17 and Table 11, page 27.

¹⁰ Hawai'i Tourism Authority, *Tourism Research Program, 2014 Visitor Plant Inventory*, Figure 10, page 7.

Figure 2. Kaua'i Inventory by Price Class¹¹



A research comparison by island on the individually advertised units for visitors is shown in the table below. It was reported that Kaua'i has 3,614 units for a total of 7,466 bedrooms that can accommodate as many as 19,481 people on a daily basis. This number was approximately double what had been anticipated.

Table 4. Total Number of Individually Advertised Units in 2014¹²

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

This same report notes that the ratio of individually advertised units to Kaua'i's total housing stock is 12.6%, second highest in the state, and far above the statewide average of 4.6%.¹³

¹¹ Hawai'i Tourism Authority, Tourism Research Program. *2014 Visitor Plant Inventory*, Figure 12, page 7.

¹² SMS Research & Marketing Services, Inc., *Individually Advertised Units in Hawaii (Vacation Rentals)*, December 2014, Table 1, page 3.

The individually advertised units report reveals the density of these individually advertised units in various areas of Kaua'i; number are very high in Kōloa, Princeville and Hanalei. Advertised units per 100 housing units in these three areas are, respectively: 39.6, 38.4 and 37.0. Trailing far behind in fourth place is Kapa'a, with 8.9 individually advertised units per 100 housing units.

Table 5. Kaua'i Individually Advertised Units by Zip Code¹⁴

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

D. Transportation and Infrastructure

Roads, traffic, construction, road signs and lack of street lights were the top complaints of visitors in a 2012 visitor survey.¹⁵ It is not unusual to see letters to the editor from visitors complaining about sitting in traffic. This is a source of frustration for residents as well. The crowded condition of Kaua'i roads are impacting visitor satisfaction and the visitor experience.

A recent report on Kaua'i's transportation looked ahead to 2035 and detailed the many needs and wants related to road infrastructure where state and federal highways funding could be used.¹⁶ Decades of deferred maintenance has been systematized. Kaua'i's priority projects (Tiers 1 and 2) total \$3.1 billion; statewide the total of Tier 1 and 2 projects is \$11.1 billion. Over the next 20 years, it is projected the state will have available between \$400 million and \$495 million annually for the entire state. Realistically, the report notes, there will not be sufficient funding in the next 20 years to cover all the priority projects. The majority of the anticipated available funds for Kaua'i (63%) will go toward system preservation and safety projects. Only 35% of upcoming funding will be directed at capacity and

¹³ *Ibid.*, Table 2, page 4.

¹⁴ *Ibid.*, Table A-2, page 7.

¹⁵ Kaua'i Visitors Bureau, CY2012 KVB Visitor Survey, Least Likes About Kaua'i.

¹⁶ CH2M Hill, *Federal-Aid Highways 2035 Transportation Plan for the District of Kaua'i*, Prepared for the State of Hawai'i, Department of Transportation, Highways Division, July 2014.

congestion issues.¹⁷ Unless other sources of funding can be secured, it is unlikely Kaua'i's road system will be expanded over the next 20 years, as some people are hoping.

Visitor industry stakeholders identified a range of transportation and infrastructure trends and issues that should be considered in planning for tourism's future on the island.

- For the past ten years, the summer and Christmas peaks have stressed the island's infrastructure, which compromises residents' lifestyle and diminishes visitors' experience.
- Tourism growth is reliant on and needs to coincide with adequacy of infrastructure, including roads and guarded beaches.
- As of 2015, Kaua'i has lost all competitors for inter-island flights, leaving only Hawaiian Airlines. This translates to a decrease in available seats and higher prices.
- Līhu'e Airport is almost at capacity and boarding gates will soon be co-shared. The length of the runway limits the size of aircraft that can safely land at this airport. Currently 767 aircraft are the largest that can land.
- Poor roads, traffic congestion and failing infrastructure are critical issues – and very costly to improve.
- Improved bus service to resort areas could reduce travel expenses and cost of living for resort workers and offer visitors an alternative to car rentals.

¹⁷ *Ibid.*, Exhibit 4-3 – Plan Cost Estimates by Funding Program, page 4-8.

E. Other Trends and Emerging Issues

Visitor Experience

- Understanding the island's capacity is critical; exceeding current capacity has resulted in negative experiences for visitors (e.g., rude treatment, traffic congestion).
- Visitors are using social media before, during and after their trip. This can be a positive and a negative. On the positive side, it offers an opportunity to take better advantage of apps and social media in reaching visitors and sharing information. Conversely, negative experiences can be broadcast worldwide via social media almost instantly.
- The global reach and success of Trip Advisor means Kaua'i's visitor industry needs to "up its game" and be held accountable.
- Visitors expect excellent customer service. Prices are much higher since 2006, visitors bring a higher expectation.
- Japanese visitors report that service is very poor and post-hurricane counts have dropped from 30% to 2.6%. The drop in Japan visitors is partially due to activities-related language barriers.
- There is a lack of training and customer service among some who serve visitors; additional workforce education and training are needed.
- The farm to table trend has been very popular.
- Efforts to market "adventure" on Kaua'i has been successful and has triggered the desire for new adventures.
- Golfing is struggling but could recover if partnered with other activities, e.g., "9-wine-dine" program or renting golf carts to see sunsets.
- Protesters have shown up at a few recent conferences. There is concern that this interference can damage future meeting revenues and impact Kaua'i's economy.
- Crime and visitor safety continue to be critical issues, with property crimes, such as car break-ins, theft and water safety being the principal concerns.

Culture

- Acknowledgement and use of Native Hawaiian place names is increasing.
- Two Native Hawaiian-related trends that seem to be more prevalent that may cause concern among visitors: 1) Sovereignty rights advocates post signage in along highways. (Example seen on the Westside: "We are not America. Enjoy your visit.") and 2) Some cultural practitioners are accepting donations from visitors at parks.

Resident Sentiment

- The importance of the visitor industry to Kaua'i's economy is not universally understood nor valued among residents. There is concern that this is especially true among the young. Efforts to share information on the role of the visitor industry in the economy should be encouraged.

Environmental Trends and Issues

- Many parks are poorly maintained and poorly equipped; they need regular cleaning, repair and maintenance.
- Better upkeep is needed at visitor sites – e.g., Russian Fort.
- New recreational trails and better maintenance of existing trails are needed. Many are in very poor condition.

Marketing Kaua'i

- For twenty years, Kaua'i was the "Island of Discovery". Kaua'i is now being marketed with a new tag line: "Island of Rejuvenation". (See Appendix C.)
- There is growing concern that Kaua'i is not delivering on the promise of relaxation and rejuvenation due to the impacts of traffic congestion.
- Social media is also driving visitors: HVCB is inviting travelers to tag #LetHawaiiHappen in their social media posts to share personal Hawaii vacation experiences broadly. (See <https://youtu.be/ptOp6WeCcwU>.)

Homestays and Transient Vacation Rentals (TVRs)

- New zoning rules are being adopted for a limited number of permits for homestay accommodations; the homeowner must be in residence.
- Must have septic tanks, not cesspools, and have adequate parking.
- TVRs are having a huge impact on hotels and hotel prices.
- On the positive side, TVRs provide an opportunity for visitors to get to know local families.

III. Kaua'i Tourism Strategic Plan Update 2016 - 2018

A. Plan Assumptions

Kaua'i's 2006-2015 tourism plan included a set of assumptions that were agreed to throughout the plan development process, with insight provided by plan advisory committee members, visitor industry stakeholder groups, and community residents. These assumptions continue to apply to the visitor industry on Kaua'i.

- The quality of life for Kaua'i residents is important for all who do business on the island, including the visitor industry. As a major stakeholder impacting resident quality of life, the visitor industry endeavors to make positive impacts on resident quality of life, benefiting both residents and visitors alike.
- The Hawaiian culture is what makes the state, and all the islands, including Kaua'i, unique for both residents and visitors. This unique indigenous culture must be retained and perpetuated for future generations.
- The visitor industry is important to the county and needs to be supported. Communication between the industry and the community is very important and needs to be encouraged on an ongoing basis.
- The type and expectations of visitors traveling to Kaua'i are changing. If the island is to remain appealing, the products and services offered must also evolve, while at same time preserve resident and community quality of life.
- The competition for visitors worldwide is increasing dramatically. Therefore, Kaua'i must continually provide products and services that are unique to the locale and distinct to the global marketplace, while staying true to the sense of place of Kaua'i.
- The natural environment and wildlife of Kaua'i are special and must be protected and supported for the benefit of residents, and to provide a quality experience for visitors.
- Advances in technology will continually provide new opportunities to promote Kaua'i and deliver information about the island to visitors.
- As this plan is being implemented, efforts should be made by visitor industry stakeholders to integrate and harmonize this plan with other plans affecting Kaua'i and the state.

B. Plan Structure

Vision

The vision for Kaua'i tourism describes the ideal way tourism should interact with its stakeholders, which include residents, visitors, related businesses, communities, government and others. This vision is what this visitor industry as a whole and this Kaua'i TSPU are striving to achieve.

Goal

The goal in this plan states what will be achieved as a result of this plan and provides the overall direction that guides work toward the plan's vision.

Objectives

There are seven objectives in this plan. The objectives are designed to move Kaua'i closer to achieving the plan goal and realizing the plan vision. Six of the objectives relate directly to the plan vision and goal. The seventh objective was developed to ensure the plan has a process to move forward toward successful implementation. Each objective is considered of equal importance and each must be supported and valued for this balanced plan to be successful.

Strategies

Accompanying each of the seven objectives are one or more strategies. These strategies were selected after determining that they met these criteria:

- There is a critical need for the strategy within the visitor industry at this time.
- The strategy is the best action to be taken to achieve the most beneficial impact.
- The strategy is achievable, at least in large part, within the timeline of the plan (FY2016-2018).
- There is energy for the strategy within the visitor industry. There are individuals, organizations and businesses willing to be a champion and take or encourage action.
- The community will accept or embrace the strategy, and will benefit from it.
- Visitors will accept or embrace the strategy, and will benefit from it.
- Where funds will be needed, it is likely that funds can be secured.

Priority Strategies

While all strategies identified will contribute to the Kaua'i TSPU goal and vision, 10 were identified as priority strategies for the period 2016 to 2018. Where time and resources are limited, these should rise to the top as the most significant for Kaua'i at this time. The priority strategies are shown by the red number in Section E. below.

As would be expected in a complex and integrated plan, many strategies address more than one objective. Where this is the case, the strategy is associated with the objective with which it is most closely aligned. Successful implementation of these strategies will contribute to progress across more than one objective.

Measurements

Performance scorecards, with current measures and directional targets for 2018, are associated with each of the seven objectives. The scorecard includes measures or indicators that will help gauge whether progress is being made toward achieving each objective. If progress is not made on a measure, action plans and strategies should be reviewed to evaluate if adjustments should be made in the plan.

The only measures included in scorecards at this time are those that have current data. It is recognized that these measures may not be as descriptive or encompassing as desired, therefore one of the strategies for Objective 7 is to develop new measures if appropriate. Additionally, specific actions will lead to specific outcomes that can and should be used to measure success as appropriate. Over time, these measurements and any new measurements should be included in scorecards.

C. Kaua'i Tourism Vision

In 2018, tourism on Kaua'i will:

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

Ola ka 'Āina Ola ke Kānaka! (Healthy Land, Healthy People!)

D. Kaua'i Tourism Goal

Responsibly manage the economic activity of tourism on Kaua'i in a more sustainable manner while creating memorable experiences for visitors, maintaining quality of life for residents and ensuring the stewardship of our natural and cultural resources.

E. Objectives, Strategies and Scorecards

Objective 1: To make positive contributions to the quality of life for residents.

		Start	Completion
#3	<p>1.a. Advocate for significant progress and/or completion of essential infrastructure improvements, including: congestion relief routes in Kapa'a; traffic circulation improvements for north and south Kaua'i; implementation of Koke'e and Ha'ena State Park Master Plans; and cruise ship harbor improvements.</p> <p><i>Suggested Partners:</i> HLTA, KVB, RCCA, KBA, PBRA, HDOT, Public Works, DLNR, DHHL, County and State Legislators</p>	FY2016	FY2018
#1	<p>1.b. Support traffic management systems to address and reduce traffic congestion and improve pedestrian safety, which might include: developing feeder roads to mitigate traffic; improving street design and town centers; developing bus and shuttle service from airport to resort areas and within resort areas; and creating pedestrian networks in resort areas.</p> <p><i>Suggested Partners:</i> KBA, HDOT, Public Works</p>	FY2016	FY2018
	<p>1.c. Encourage implementation of additional affordable workforce housing solutions for Kaua'i residents to maintain and attract workforce for the visitor industry.</p> <p><i>Suggested Partners:</i> Planning Dept., Housing Agency</p>	FY2017	FY2018
#10	<p>1.d. Support the development and promotion of community-driven programs that reinforce the unique sense of place of communities, such as those with historical and/or cultural significance.</p> <p><i>Suggested Partners:</i> CPEP, NaHHA, cultural and historical organizations</p>	FY2016	FY2018
#7	<p>1.e. Support adequate funding and staffing for capital improvements, including maintenance and enforcement for public parks, trails and recreation areas.</p> <p><i>Suggested Partners:</i> State Legislators, Na Ala Hele, DLNR/State Parks Division, County Parks and Recreation, community organizations</p>	FY2016	FY2018
#8	<p>1.f. Support the development of regulations and the administrative structure to appropriately identify, monitor and enforce homestays (Bed & Breakfasts) and Individual Vacation Units</p>	FY2016	FY2017

(homes and condos) and report the annual number of visitors staying in these accommodations.

Suggested Partners: State and County Planning and Finance Departments

- 1.g. Support the development of a method to more accurately track visitor stays in the unit type “other” (e.g., homestays, TVRs outside the VDA, etc.) FY2016 FY2018

Suggested Partners: State and County Finance and Planning Departments

- 1.h. Educate the public on ongoing efforts by the visitor industry to give back to the community. FY2016 FY2018

Suggested Partners: HLTA, KVB, Individual employers, Visitor Industry Charity Walk

Objective 1 Scorecard (To make positive contributions to quality of life for residents)			
Ref.	Measure^{18 19}	Data Year 2014	Desired Change
1.1	Residents surveyed: rate your perception of tourism on Kaua'i:	86% Top and Mid-Range 12% Bottom Tier	Increase Top Rating
1.2	Residents surveyed: rate if tourism enhances residents' quality of life:	63% Top and Mid-Range 36% Bottom Tier	Increase Top Rating
1.3	Residents surveyed: rate if...		
	- Tourism creates well-paying jobs for residents:	71% Top and Mid-Range 28% Bottom Tier	Increase Top Rating
	- Tourism creates jobs that have opportunities for advancement:	76% Top and Mid-Range 23% Bottom Tier	Increase Top Rating
	- Tourism has brought more benefits than problems:	63% Top and Mid-Range 36% Bottom Tier	Increase Top Rating
	- Tourism has been mostly positive for self and family:	56% Top and Mid-Range 32% Bottom Tier	Increase Top Rating
1.4	Residents surveyed: rate if tourism increases traffic problems:	84% Top and Mid-Range 16% Bottom Tier	Decrease Top Rating

¹⁸ HTA Resident Sentiment Survey conducted by Market Trends Pacific, Inc., John M. Knox & Associates, OmniTrak Group, and QMark Research, 2014.

¹⁹ Hawai'i Resident Sentiment Survey scores are based on a scale of 1 to 10, with 10 being “Completely Agree” and 1 being “Do Not Agree at All”. Scores are grouped: Top Box 9-10, Mid-Range 6-8 and Bottom Tier 1-5.

Objective 2: To increase the economic contribution of the visitor industry to Kaua'i.

		<u>Start</u>	<u>Completion</u>
	2.a. Develop and implement annual marketing plans that highlight Kaua'i's unique positioning, target desired active markets, and increase occupancy during shoulder periods.	FY2016	FY2018
	<i>Suggested Partners:</i> KVB, HTA, HVCB		
#2	2.b. Support career preparation and advancement programs to attract new employees, especially local residents, to the visitor industry to ensure an available, well-qualified workforce.	FY2016	FY2018
	<i>Suggested Partners:</i> AOHT, KCC, DLIR's WorkWise, SHRM, nonprofits		
	2.c. Within the visitor industry, support training and programs for the current workforce in order to provide career pathways, upgrade skills, ensure knowledge and understanding of the host culture, and, for newcomers, offer an acculturation to Kaua'i.	FY2017	FY2018
	<i>Suggested Partners:</i> Individual employers, HLTA, Kaua'i Chamber of Commerce, KCC OCET		
#9	2.d. Encourage the visitor industry, airlines and the growing cruise line industry, to buy and promote Kaua'i products and support businesses on Kaua'i.	FY2016	FY2016
	<i>Suggested Partners:</i> Kaua'i Made, Kaua'i Grown, OED, Kaua'i Chamber of Commerce, Kaua'i County Farm Bureau, regional business associations		
#3	2.e. Advocate for lifting the cap on existing Transient Accommodation Tax (TAT) funds distributed to counties, thus increasing the allocation to Kaua'i for services and infrastructure that support the island community.	FY2016	FY2017
	<i>Suggested Partners:</i> Mayor's Office, HTA, HLTA, Kaua'i Chamber of Commerce		

Objective 2 Scorecard (To increase economic contribution of visitor industry to Kaua'i)				
Ref.	Measure	Baseline Data Yr 2005	Data Year 2014p	Desired Change
2.1	Per Person Per Day Visitor Spending:	\$160	\$171	Increase
	Total Visitor expenditures (in millions):	\$1,162	\$1,466	Increase
	Total Visitor Arrivals:	128,807	1,113,605	Maintain
	Total Arrival Cruise:	311,705	123,071	Maintain
	Total Arrival Non-cruise: ²⁰	817,102	990,534	Maintain
	Per Party Per Trip Visitor Spending: - Luxury Hotel: - Budget to Standard Hotel:	\$4,387 \$2,870	\$4,959 \$2,879	Increase All Measures
2.2	Number of airline seats available annually:			
	- Interisland: - From U.S. Mainland:	NA NA	1,085,098 622,508	Maintain Maintain
2.3	Hotel occupancy during shoulder periods ²¹ :			
	- April/May:	75%	69.9%	Increase
	- September/Mid-December: ²²	66%	63.3%	Increase
	Timeshare occupancy during shoulder periods: ²³			
- April/May (Q2):	NA	88.3%	Increase	
- September/Mid-December: ²⁴ (Q4):	NA	87.8%	Increase	
2.4	Percent of First time Visitors:	35%	30%	Increase
	Percent of Repeat Visitors:	65%	70%	Maintain
2.5	Resident Population:	62,640	70,475 ²⁶	Track
	Civilian Workforce:	32,750	34,748 ²⁷	
	De facto population per square mile:	143.3	161.3 ²⁸	
	Average de facto population ²⁵			
	- Cruise: - Non-cruise	839 18,857	986 23,536	

²⁰ Arrival by means other than cruise ship

²¹ Numbers related to hotel occupancy reflect only properties included in the STAR Report; one Kaua'i hotel is not included in this report. Source: Hospitality Advisors/STR, Inc.

²² Excluding Thanksgiving

²³ Timeshare data is reported quarterly, according to June 12, 2015 email from Hawai'i Tourism Authority

²⁴ Excluding Thanksgiving

²⁵ Visitor average daily census data.

²⁶ U.S. Census Bureau, State and County Quick Facts, Kaua'i County, Hawai'i, Population 2014 estimate, <http://quickfacts.census.gov/qfd/states/15/15007.html>

²⁷ U.S. Census Bureau, Selected Economic Characteristics 2009-2013 ACS 5-Year Estimates, Civilian Labor Force, <http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>

²⁸ 2014 data not available. De facto population based on 2013 data.

Objective 3: To increase communications, interactions, and understanding between stakeholder groups, especially between residents and the visitor industry.

- | | | <u>Start</u> | <u>Completion</u> |
|-----------|---|--------------|-------------------|
| #5 | <p>3.a. Encourage two-way communications among residents, Native Hawaiians and the visitor industry to increase understanding of the visitor industry and local Kaua'i culture and their collective value to the island's economy.</p> <p><i>Suggested Partners:</i> HLTA, KVB, KNHCC, Kaua'i Chamber of Commerce, regional business associations</p> | FY2016 | FY2018 |
| | <p>3.b. Promote activities that appeal to visitors and residents, including community events, sports events, and festivals, especially during shoulder periods.</p> <p><i>Suggested Partners:</i> CPEP, KVB, HTA, OED</p> | FY2016 | FY2018 |

Objective 3 Scorecard (To increase communication/understanding among visitor industry, residents and Native Hawaiians)			
Ref.	Measure ²⁹	Data Year 2014	Desired Change
3.1	Residents surveyed: rate if you feel you have a voice in Kaua'i's tourism development:	38% Top and Mid-Range 61% Bottom Tier	Increase Top Rating
3.2	Residents surveyed: rate if the government has sponsored festivals, activities and sports events for residents and visitors:	66% Top and Mid-Range 31% Bottom Tier	Increase Top Rating
3.3	Residents surveyed: rate if Kaua'i is being run for tourists at the expense of local people:	60% Top and Mid-Range 30% Bottom Tier	Decrease Top Rating

²⁹ HTA Resident Sentiment Survey conducted by Market Trends Pacific, Inc., John M. Knox & Associates, OmniTrak Group, and QMark Research, 2014.

Objective 4: To maintain and improve visitor satisfaction with their experience on Kaua'i.

	<u>Start</u>	<u>Completion</u>
<p>4.a. Advocate for and support the development of a means to educate visitors prior to or upon arrival by providing basic information that will enhance their safety, enjoyment, and appreciation of Hawaiian culture and the island's natural resources, which might include:</p> <ul style="list-style-type: none"> • teaching visitors when not to interact with the environment (such as: avoid walking on reefs or touching wildlife, such as sea turtles, and avoid picking flowers, plants or leaves) • improving information on accessibility for visitors with disabilities • educating visitors not to introduce nor transport invasive species • developing apps for smartphones and tablets to provide information and educate visitors. 	FY2017	FY2018

Suggested Partners: HTA, KVB, HLTA

<p>4.b. Support the development of consistent, accurate signage to assist visitors and residents, which might include: providing easy directions; identifying communities and cultural/historic sites; identifying areas that are dangerous; and providing interpretive methods to educate/enhance cultural, natural, and historical sites where appropriate.</p>	FY2016	FY2017
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Suggested Partners: County and State departments of transportation, OED, KVB, Na Hoku Welo

<p>4.c. Support efforts to increase safety and security for visitors and residents at public places, such as beach parks, events, harbors, and cultural sites.</p>	FY2016	FY2018
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Suggested Partners: HTA, KPD, KFD/Ocean Safety Bureau, DLNR, Prosecuting Attorney – Crime Task Force

<p>4.d. Support the development of a process by which visitors can easily access information in case of an emergency or natural disaster.</p>	FY2016	FY2018
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Suggested Partners: Visitor industry, Civil Defense

Objective 4 Scorecard (To maintain and improve visitor satisfaction with their Kaua'i experience)			
Ref.	Measure	Data Year 2014 (Prelim.)	Desired Change
4.1	Visitor Activity Participation – Continental U.S.: <ul style="list-style-type: none"> - Sightseeing - Recreation - Entertainment - Shopping - Culture - Transportation 	95.5% 91.4% 93.9% 90.8% 57.2% 94.7%	Increase Excellent Rating
4.2	Visitor Satisfaction – Continental U.S.: <ul style="list-style-type: none"> - Excellent - Above Average - Below Average - Poor 	72.0% 26.1% 1.7% 0.2%	Increase Excellent Rating
4.3	Number of Crimes Against Visitors (based on non-resident victims involved in incidents reported by KPD): ³⁰	501	Reduce
4.4	Number of Police Officers on Kaua'i: ³¹	142	Increase
4.5	Number of Drownings: ³² <ul style="list-style-type: none"> - Residents - Visitors 	1 6	Reduce Reduce

³⁰ Data provided by David Pickard, Information Technology, Kaua'i Police Department, via email to KPAA, July 9, 2015.

³¹ Email from Kaua'i Police Department to KPAA, June 15, 2015.

³² Email from Kaua'i Fire Department, Ocean Safety Bureau to KPAA, June 15, 2015.

Objective 5: To reinforce authentic Native Hawaiian culture and local Kaua'i culture, the foundations of our unique sense of place.

		<u>Start</u>	<u>Completion</u>
#6	5.a. Increase awareness of the Hawaiian culture among residents of all ages and the visitor industry, including employees and employers, such as by: encouraging guidance from respected Hawaiian cultural advisors and practitioners on Kaua'i to ensure that what is perpetuated is authentic for Kaua'i; encouraging the proper use of the Hawaiian language; and integrating Hawaiian culture into ongoing visitor industry training.	FY2016	FY2018

Suggested Partners: NaHHA, KNHCC, HLTA, Na Hoku Welo

Objective 5 Scorecard (Reinforce authentic Native Hawaiian and local culture, the foundations of our unique sense of place)

Ref.	Measure ³³	Data Year 2014	Desired Change
5.1	Residents surveyed: rate if tourism helps preserve Native Hawaiian culture and language:	52% Top and Mid-Range 47% Bottom Tier	Increase Top Rating
5.2	Residents surveyed: rate if tourism currently presents Native Hawaiian culture in an authentic manner:	54% Top and Mid-Range 43% Bottom Tier	Increase Top Rating

³³ HTA Resident Sentiment Survey, conducted by Market Trends Pacific, Inc., John M. Knox & Associates, OmniTrak Group, and QMark Research, 2014.

Objective 6: To contribute to the preservation and enhancement of the natural resources on Kaua'i, including land and ocean.

- | | <u>Start</u> | <u>Completion</u> |
|---|--------------|-------------------|
| <p>6.a. Direct visitors to parks, beaches, and other natural resource areas that are clean, well equipped and intended to accommodate resident and visitor usage.</p> <p><i>Suggested Partners:</i> County and State departments, KVB, Chamber of Commerce</p> | FY2016 | FY2018 |
| <p>6.b. Promote current efforts and encourage expanded efforts green initiatives and green practices, such as recycling, and energy and water conservation efforts, throughout the visitor industry and community.</p> <p><i>Suggested Partners:</i> Visitor industry, County Sustainability Coordinator, Public Works/Solid Waste Division and Dept. of Water, KIUC, Zero Waste Kaua'i, Blue Planet</p> | FY2017 | FY2018 |
| <p>6.c. Encourage organizations in the visitor industry to participate in the County's "Adopt-A-Park" and other natural resource stewardship programs to care for the environment and give the community a sense of pride and ownership. Industry involvement in these natural areas will increase positive experiences for residents and visitors.</p> <p><i>Suggested Partners:</i> County Parks and Recreation Dept., DLNR's State Parks Division and Na Ala Hele Trails and Access System, tourism-related businesses</p> | FY2017 | FY2018 |

Objective 6 Scorecard (Help preserve and enhance Kaua'i's natural resources on land and ocean)			
Ref.	Measures	Data Year 2014	Desired Change
6.1	Residents surveyed: ³⁴ rate if tourism helps sustain Hawai'i's natural resources, parks and cultural sites:	60% Top and Mid-Range 38% Bottom Tier	Increase Top Rating
6.2	Number of county and state parks that have been adopted by the visitor industry through the County's Adopt-A-Park program and the State's park stewardship program:	39 of 54 County parks adopted by community ³⁵	Increase

³⁴ HTA Resident Sentiment Survey, conducted by Market Trends Pacific, Inc., John M. Knox & Associates, OmniTrak Group, and QMark Research, 2014.

³⁵ KPAA telephone conversation with Eddie Sarita, Coordinator, War Memorial Convention Center, County of Kaua'i, May 28, 2015.

Objective 7: To establish a process for ensuring Kaua'i County TSPU implementation and coordination with other county and state plans. Develop a mechanism to track plan objectives, regularly review scorecards, and make revisions as necessary.

- | | | |
|---|--------------|-------------------|
| | <u>Start</u> | <u>Completion</u> |
| 7.a. Successfully implement the Kaua'i County TSPU by contracting an organization to facilitate plan implementation by: coordinating meetings of an advisory committee; tracking progress on action plans; securing data to update scorecards; and facilitating public updates on outcomes. | FY2016 | FY2018 |

Suggested Partner: OED

Objective 7 Scorecard (Monitor implementation and progress of TSPU)		
Ref.	Measures	Fiscal Year 2016
7.1	Percent of action steps completed as indicated in the plan.	# Action Steps # Action Steps Completed % Completed
7.2	Kaua'i County TSPU tracked and reported on every year. (Annual meeting of Advisory Committee conducted, updated scorecards presented, and plans revised as appropriate.)	Tracked – Yes/No Reported – Yes/No
7.3	Percent of desired scorecard measures with regularly available data provided to track progress.	# Desired Measures # Measures with Data Regularly Available % of Measures with Data Regularly Available # Measures with Data Not Regularly Available % of Measures with Data Not Regularly Available
7.4	Number of measures that met desired change targets.	# of Desired Change Targets Met

IV. Planning for Implementation

Following the Kaua'i TSPU July 2015 completion, the County Office of Economic Development (OED) will be working with the visitor industry on the implementation of this plan. A Kaua'i TSPU Implementation Committee will be formed to develop specific action plans on the priority strategies, at a minimum, and to encourage action on these strategies throughout the industry.

OED plans to secure professional services to convene and facilitate the work of the Implementation Committee during the first year of the plan (July 1, 2015-June 30, 2016) and intends to request additional County funding for each of the subsequent two years of the plan to continue work toward the plan's goal and vision.

Progress in implementing the Kaua'i TSPU will be assessed annually, and a written progress report will be issued to inform all stakeholders of what has been accomplished and any challenges encountered. The plan may be adapted to meet changing conditions and to take advantage of new opportunities.

V. Appendices

- A. Acknowledgements
- B. Impacts of the Kaua'i Tourism Strategic Plan 2006-2015
- C. Kaua'i Brand Study
- D. Listing of Agencies and Community Groups
- E. Definitions of Visitor Accommodation Types
- F. References

Appendix A. Acknowledgements

Advisory Group Members

Kanoe Ahuna	Na Hoku Welo, LLC, Kaua'i Nui Kuapapa Project
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Randy Francisco	Kaua'i Chamber of Commerce and Office of Economic Development (OED)
Lea Kaiaokamalie	County of Kaua'i, Planning Department
Susan Tai Kaneko	Kaua'i Economic Development Board (KEDB)
Sue Kanoho	Kaua'i Visitors Bureau
Lucy Kawaihalau	Vacation Rental Managers of Kaua'i
Jody Kono Kjeldsen	Po'ipu Beach Resort Association
Cesare "Ce" Lucente	Outfitters Kaua'i
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Thomas Nizo	West Kaua'i Business & Professional Association
Laura Richards	Hanalei Colony Resort Associates
Neill Sams	Kapa'a Business Association
Peter Sit	Pono Kai Resort
Dirk Soma	Kaua'i Native Hawaiian Chamber of Commerce
Candace Tabuchi	Kaua'i Community College, Hospitality & Tourism
Denise Wardlow	Hawai'i Lodging and Tourism Authority, Kaua'i Chapter
Marie Williams	County of Kaua'i, Planning Department

Kaua'i TSPU Steering Committee

George K. Costa, Director, County of Kaua'i, Office of Economic Development (OED)
 Nalani Brun, Specialist IV-Tourism, County of Kaua'i, Office of Economic Development (OED)
 Sue Kanoho, Executive Director, Kaua'i Visitors Bureau

Stakeholder Survey

Key stakeholder groups were identified to provide feedback on the 2006 Kaua'i Tourism Strategic Plan and to identify current and emerging issues and opportunities for the visitor industry. An invitation to participate in the November 2015 online survey was distributed through County Office of Economic Development, Kaua'i Visitors Bureau, Hawai'i Lodging & Tourism Association, and by individual Advisory Group members. A reminder was distributed one week before the deadline to respond. A total of 37 responses were received.

Participants in June 16, 2015 Stakeholders Feedback Session

In June 2015, key visitor industry stakeholders were invited to participate in a session to review and discuss the draft Kaua'i Tourism Strategic Plan Update. This two-hour session drew 27 participants who affirmed the plan's goal, objectives and strategies. They also offered ideas and suggestions to strengthen the plan. How to include this feedback was discussed at the final meeting of the Advisory Group on June 26, 2015. Stakeholders at the meeting included:

Jenny Allen	Limahuli Garden and Preserve, National Tropical Botanical Gardens
Jim Braman	Hanalei Bay Resort / HLTA Kaua'i
Nalani Brun	County of Kaua'i, Office of Economic Development (OED)
June Cappiello	Westin Princeville Ocean Resort Villas
Donald Chock	St. Regis Princeville Resort
Ike Cockett	Koloa Landing Resort & Spa / HLTA Kaua'i
Kit Furderer	Holo Holo Charters, Inc.
Christina Gabriel	Marriott's Waiohai Beach Club
Christopher Gampon	Outrigger Kiahuna Plantation
Lea Kaiaokamalie	County of Kaua'i, Planning Department
Sue Kanoho	Kaua'i Visitors Bureau
KipuKai Kuali'i	Kaua'i County, Council Services Division
Cesare "Ce" Lucente	Outfitters Kaua'i
Gana Maheshwaran	Outrigger Kiahuna Plantation
Tessa McSwain	National Tropical Botanical Garden
Marcie Millett	Holo Holo Charters, Inc.
Diane Pavao	Kaha Lani - Castle Resorts & Hotels
Laura Richards	Hanalei Colony Resort
Neill Sams	Kapa'a Business Association
Peter Sit	Pono Kai Resort
Kamika Smith	Smith's Motor Boat Service, Inc.
Dirk Soma	Kaua'i Native Hawaiian Chamber of Commerce
Jeanne Toulon	Koloa Rum Company
Annette Vanstory	Courtyard Kaua'i
Denise Wardlow	Hawai'i Lodging & Tourism Association-Kaua'i Chapter
Laura Williams	Ho'ouluwehi Sustainable Living Institute, Kaua'i Community College
Jay Youn	Courtyard Kaua'i



Information and Data Providers

Gratitude is extended to the agencies that graciously provided reports and data for this plan. Special thanks go to: Sarah Blane, County of Kaua'i, Office of the Mayor; Lt. Roderick Green and David Pickard, Kaua'i Police Department; Sue Kanoho, Kaua'i Visitors Bureau; Daniel K. Nahoopii and staff, Hawai'i Tourism Authority; Battalion Chief Jason Ornellas, Kaua'i Fire Department; Kalani Vierra, Kaua'i Fire Department, Ocean Safety Bureau; and Marie Williams, County of Kaua'i Planning Department.

Appendix B. Impacts of the *Kaua'i Tourism Strategic Plan 2006-2015*

Through the visitor industry stakeholder survey and meetings of the Kaua'i TSPU Advisory Group, it was determined that the 2006 plan (Kaua'i TSP) had an impact on the visitor industry in a number of positive ways, including the following.

Culture

- The Kaua'i TSP helped the visitor industry refocus on cultural offerings.
- HTA CPEP grants, administered by County OED, helped reinvigorate cultural activities and festival. Focus increased on "authentic" culture and genuine aloha, which is Kaua'i's draw for visitors. (There is a need to reinstate HTA \$100,000 funding for Kaua'i from CPEP.)

Community Well-being and the Visitor Experience

- The plan enhanced the industry's sensitivity to residents and the importance of their well-being; more care was taken with how Kaua'i was marketed. It became clear that we cannot view marketing alone; our children and communities need to be healthy and thriving too.
- It also highlighted the need to take care of community. OED recognizes that product is important; if it makes residents happy, it sells well with visitors.
- One result is that OED is currently restructuring its programs within *moku* boundaries.

Infrastructure Improvements

- The plan's focus on infrastructure needs resulted in the completion of a limited number of improvements. At the same time, there was evidence the visitor-resident rift is triggered by infrastructure stresses that result in takeaways from residents (e.g., having a treasured and once-secluded beach "discovered").
- Lihu'e Airport priorities now include landscaping upkeep; an entertainment stage constructed for the lobby; redesigning the old Aloha Airlines Terminal gate holding area, and maintaining the cultural look of the airport.
- State Harbors Division-Kaua'i has just one cruise ship that overnights at Nawiliwili; the harbor is a daylight port-only for cruise ship arrivals and departures.
- CBDG funding for historical signage was secured.

Growth Management

- The plan refocused attention on the critical importance of managing the island's build-out, growth and infrastructure.
- A number of recorded permit approvals for Transient Vacation Rentals were secured.
- The focus on sustainability and wise resource management increased.

Visitor Safety

- Successful water safety campaigns have been developed: tubes installed at beaches island-wide, airport video at baggage claim, advocacy by Dr. Monty Downs.

Workforce

- Workforce needs continuous training in handling visitors and taking pride in their work. AOHT is partnering with the visitor industry workforce to train high school students.

Planning Horizon and Monitoring

- It was recognized that a 10-year plan is unrealistic; 5-years or under is preferable, as circumstances change too often in 10 years.
- Without support to monitor the plan's implementation, progress is slow or halts.

Appendix C. Kaua'i Brand Study³⁶



Kaua'i Brand Explained

Deep within every human being, buried all too often beneath layers of modern life, is a primal connection with nature. It is on Kaua'i that this connection reawakens. Take a step in any direction and plunge into a world of infinite greens and blues, a world that restores your inner equilibrium and reassures you that the Pacific island of your dreams does indeed exist. Peaceful, lush and naturally spectacular, this is Kaua'i.

Brand Pillars

Lush, Idyllic, Peaceful, Immersed in Nature, Crescent-shaped beaches, Waterfalls, Nāpali Coast, Endless shades of green, Serene tropical rivers, Relaxed pace

Kaua'i Visitor Profile

The Kaua'i visitor is attracted to nature and the peaceful, immersive environment it offers. They travel to escape the busy-ness of their life at home and have little interest in urban experiences or crowds.

They tend to be less active, preferring to spend long periods immersing themselves in a single experience rather than sampling a lot of variety. Relaxing on vacation is their number one priority and they don't want to feel pressured to "see all the sights."

³⁶ Hawai'i Visitors and Convention Bureau, *Kaua'i Brand Study for the Island of Kaua'i - Rejuvenating*, September 2011

Appendix D. Listing of Agencies and Community Groups

Kaua'i County Agencies and Community Groups

County Council	Kaua'i County Council is a lawmaking body that determines policies and programs for the county, including the review, amendment, and passage of an annual operating and capital improvements budget.
CDA	Civil Defense Agency, County of Kaua'i
DoW	Department of Water, County of Kaua'i
FD	Finance Department, County of Kaua'i
HA	Housing Agency, County of Kaua'i
KBA	Kapa'a Business Association
Kaua'i Chamber of Commerce	An organization that represents all elements of Kaua'i's business and industry, both large and small. Its mission is "to promote, develop, and improve commerce, quality growth and economic stability in the County of Kaua'i."
KCC	Kaua'i Community College provides a transfer-level liberal arts education, but also offers a variety of vocational and professional training programs. Four-year and graduate degrees are offered through the University Center.
KEDB	Kaua'i Economic Development Board, a non-profit organization that explores ways to diversify Kaua'i's economy and create and strengthen industries that can flourish on Kaua'i. Currently focuses on science and technology, diversified agriculture and aquaculture, health and wellness, and visitor industry support.
KFD	Kaua'i Fire Department (included the Ocean Safety Bureau), County of Kaua'i
KHPRC	Kaua'i Historic Preservation Review Commission, County of Kaua'i
KHS	Kaua'i Historical Society
KNHCC	Kaua'i Native Hawaiian Chamber of Commerce
KPAA	Kaua'i Planning & Action Alliance is a non-profit organization that bring together government, businesses, and the community to collaboratively develop solutions and take action on Kaua'i's urgent community issues
KPD	Kaua'i Police Department preserves the public peace, prevents and detects crimes, arrests offenders, protects the rights of persons and property, enforces and prevents violations of the law, and services in civil and criminal proceedings.
KVB	Kaua'i Visitors Bureau promotes the interests of Kaua'i and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions on Kaua'i.
Mayor	Chief executive officer of the county exercises supervision over executive agencies and performs other duties prescribed by the Charter or by law, and coordinates the drafting of the operating and capital improvements budget.
NHW	Na Hoku Welo, Kaua'i consulting company

OED	Office of Economic Development, works with the community to create economic opportunities for the development of a healthy, stable and balanced economy for the residents of the county.
OED-KM	Kaua'i Made is a program of County of Kaua'i, Office of Economic Development for products made or crafted on island including food and agricultural products, distinctive art and jewelry, Hawaiian heritage products, local crafts, music, apparel, and gift items.
OED-KG	Kaua'i Grown, is a Kaua'i County Farm Bureau program to brand and market Kaua'i agricultural products, and recognize retailers and restaurants that support island farmers.
P&R	Parks and Recreation, County of Kaua'i
PBRA	Po'ipu Beach Resort Association
PD	Planning Department, County of Kaua'i has review functions concerning the proposed general plan, development plans, zoning and subdivision ordinances, and any modifications or amendments.
PA-CTF	Prosecuting Attorney-Crime Task Force, County of Kaua'i
PW	Public Works Department, County of Kaua'i
RCCA	Royal Coconut Coast Association
SWD	Solid Waste Division, Public Works Department, County of Kaua'i
VASK	Visitor Aloha Society of Kaua'i provides aloha and assistance to visitors who have been victims of crime and other adversities.

Hawai'i State Agencies and Community Groups

AOHT	The Academy of Hospitality & Tourism program, based on a national curriculum and program developed by the National Academy Foundation (NAF), targets students from the tenth to the twelfth grade and is designed to provide hands-on learning experiences for students who are interested in the field of travel and tourism.
AOTT	Academy of Travel and Tourism is a nationally recognized career exploration, awareness and mentoring program for high school juniors and seniors. AOTT students have opportunities for paid internships with local businesses, community service projects, familiarization trips, industry tours, AOTT scholarships and other experiences.
DBEDT	Department of Business, Economic Development and Tourism, State of Hawai'i works to diversify the economy, expand existing business, and attract new economic activity.
DHHL	Department of Hawaiian Homelands, State of Hawai'i
DLIR	Department of Labor and Industrial Relations, State of Hawai'i administers programs that improve job opportunities, protect workers' employment rights, and assure a safe and healthy work environment. Administers the WorkWise program.

DLNR	Department of Land and Natural Resources, State of Hawai'i manages the state's public lands and the water and mineral resources on those lands and the state's aquatic life and wildlife resources, forest reserves, state parks, and small boat harbors; administers the state conservation districts and the endangered species, natural area reserves, boating and ocean recreation, and historic preservation programs. Includes Aquatic Resources Division (DAR), Division of Boating and Ocean Recreation (BORD), Division of Conservation and Resource Enforcement (DOCARE), Division of Forestry and Wildlife (DOFAW), State Historic Preservation Division (SHPD), Natural Area Reserves System Commission (NABS), and Divisions for Land, Parks, and Trails and Access.
DLNR-NAH	Department of Land and Natural Resources-Na Ala Hele Program and Kaua'i NAH Advisory Council, administered by Division of Forestry and Wildlife (DOFAW), State of Hawai'i
DOA	Department of Agriculture, State of Hawai'i promotes the conservation, development, and utilization of agricultural resources in the State. Provides agricultural inspections for all incoming (to the state) flights.
DOE	Department of Education, State of Hawai'i manages the statewide systems of public schools and public libraries, and includes such programs as the high school-level Academy of Travel and Tourism (AOTT).
HCC	Hawai'i Convention Center provides event and business services.
HDOA	Hawai'i Department of Agriculture assists in the development and expansion of agricultural industries through data collection and information dissemination, as well as promotional and marketing efforts.
HDOT	Hawai'i Department of Transportation, responsible for the establishment, maintenance, and operation of transportation facilities for the state to provide a system of integrated transportation facilities, which include highways, airports, and harbors. Includes Airports, Harbors and Highways Divisions, and Visitor Information Program Office.
HLTA	Hawai'i Lodging and Tourism Association, statewide trade association of hotels, hotel management firms, hotel owners, suppliers, and other related firms and individuals. Mission of the HLTA is to 1) advocate the needs of its members with federal, state and county governments; 2) provide educational opportunities, timely information and appropriate resources to members, legislators, media and the community; 3) provide a wide range of economic benefits and preferred services to its members; and 4) support and contribute to a better quality of life and environment for the community and visitors.
HTA	Hawai'i Tourism Authority strengthens Hawai'i's, vital visitor industry by formulating policy, conducting research, coordinating development and implementation of the State Tourism Strategic Plan, supporting product development and coordinating the worldwide marketing of Hawai'i as a visitor destination.
HTA/CPEP	Cultural Product Enrichment Program, a joint state and county program, managed on Kaua'i by the County OED

HUGS	Hawai'i Harbor User Group, to establish a marine transportation industry group to develop a set of priorities for future port development, and help the DOT obtain mandates, approvals and financing to implement projects to meet the needs of the community.
HVCB	Hawai'i Visitors and Convention Bureau, non-profit marketing organization with visitor industry and general business representation. The Hawai'i Tourism Authority selected HVCB for marketing management services in the North America Major Market Area and Corporate Meetings and Incentives.
KCC	Kaua'i Community College offers workforce training and liberal arts courses; students may earn certificates or degrees.
NaHHA	Native Hawaiian Hospitality Association, non-profit organization of individuals, corporate organizations, and institutions with an interest in the visitor industry and hospitality issues. NaHHA works to encourage the preservation and perpetuation of Hawaiian values, customs, language and artifacts; to incorporate the principles of ho'okipa and aloha into the operating culture of visitor industry enterprises; and to assist native Hawaiians in achieving success in tourism and hospitality endeavors that are culturally sensitive, environmentally sustainable, and economically beneficial.
NCL	Norwegian Cruise Line with U.S.-flagged ships, the company is the only cruise line in the industry to offer year-round seven day inter-island Hawai'i cruises with round-trip itineraries from Honolulu.
OHA	Office of Hawaiian Affairs advocates for Hawaiians in the state legislature, state and federal courts, in the United States Congress, and in the local media, as well as by supporting community initiatives and interests related to native Hawaiians.
SHRM	Society for Human Resource Management, Hawai'i Chapter
TNC	The Nature Conservancy of Hawai'i works to preserve the plants, animals, and natural communities that represent the diversity of life on earth by protecting the lands and waters they need to survive.
UH	University of Hawai'i provides all qualified people in Hawai'i with an equal opportunity for quality college and university education and training. Includes campuses in Mānoa and Hilo.
UH-CC	University of Hawai'i Community Colleges includes seven campuses that provide maximum educational opportunities to the residents of Hawai'i.
UH-TIM	University of Hawai'i School of Travel Industry Management provides training for students interested in working in the travel industry.
VASH	Visitor Aloha Society of Hawai'i, its mission is to share the Aloha spirit with visitors victimized by crime or adversity.

E. Definitions of Visitor Accommodation Types³⁷

"Apartment-Hotel" means a building or portion thereof used as a hotel as defined in this Section and containing the combination of individual guest rooms or suite of rooms with apartments or dwelling units.

"Homestay"³⁸ means an owner occupied dwelling unit in which overnight accommodations are provided to transient guests within the same dwelling unit in which the owner resides and the respective owner currently benefits under Sec. 5A-11 of the Code for a homeowner's exemption for the homestay site. A guest house may not be used as accommodations for transient guests in a homestay operation.

"Hotel" means any building containing six (6) or more rooms intended or designed to be used, or which are used, rented or hired out to be occupied for sleeping purposes by guests when the rooms are open to the occupancy by the general public on a commercial basis whether the establishment is called a hotel, resort hotel, inn, lodge or otherwise which rooms do not constitute dwelling units.

"Motel" means a group of attached or detached buildings containing rooms, designed for or used temporarily by automobile tourists or transients, with garages attached or parking space conveniently located to each unit, including auto court, tourist court or motor lodge, or otherwise, which rooms do not constitute dwelling units.

"Multi-Family Transient Vacation Rental" means a multi-family dwelling unit which is used as a transient vacation rental.

"Time Share Plan" means any plan or program in which the use, occupancy, or possession of one or more time share units circulates among various persons for less than a sixty (60) day period in any year, for any occupant. The term "time share plan" shall include both time share ownership plans and time share use plans, as follows:

(A) "Time share ownership plan" means any arrangement whether by tenancy in common, sale, deed, or other means whereby the purchaser receives an ownership interest and the right to use the property for a specific or discernible period by temporal division.

(B) "Time share use plan" means any arrangement, excluding normal hotel operations, whether by membership agreement, lease, rental agreement, license, use agreement, security or other means, whereby the purchaser receives a right to use accommodations or facilities, or both, in a time share unit for a specific or discernible period by temporal division, but does not receive an ownership interest.

"Time Share Unit" means the actual and promised accommodations, and related facilities, which are the subject of a time share plan.

³⁷ Definitions provided by County of Kaua'i Planning Department, July 8, 2015, drawn from Ordinance 935.

³⁸ This is a new definition, per County Ordinance 987, passed in 2015.

"Transient Vacation Rental" means a dwelling unit which is provided to transient occupants for compensation or fees, including club fees, or as part of interval ownership involving persons unrelated by blood, with a duration of occupancy of one hundred eighty (180) days or less.

"Visitor Destination Area or VDA" are those areas designated as Visitor Destination Areas on County of Kaua'i zoning maps.

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Kaua‘i Tourism Strategic Plan Update 2016-2018

Prepared for the



**County of Kaua‘i
Office of Economic Development
July 2015**