

KAUA'I

DESTINATION MANAGEMENT ACTION PLAN 2021–2023

*Maika'i Kaua'i,
Hemolele i ka mālie.*

Beautiful Kaua'i,
Peaceful in the calm.

HAWAII TOURISM
AUTHORITY

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ON THE COVER *This 'ōlelo no'ēau speaks about the peace and calmness of Kaua'i. It is most appropriate today that Kaua'i remain a sanctuary of calmness in these very unsettling times.*



I. Introduction

PURPOSE OF THE PLAN

In 2019, the Hawaiian Islands received a record high of 10.4 million visitors. While this brought in \$17.75 billion in total visitor spending to Hawai‘i’s businesses generated \$2.07 billion in taxes, and supported 216,000 jobs statewide, it has also put pressure on some of our destinations and communities. This situation is not unique to Hawai‘i. Other popular destinations—from Venice, Italy to Machu Picchu, Peru, to Kyoto, Japan—also felt the negative effects of tourism, which not only impact the residents’ quality of life but also the quality of the visitor experience.

The Hawai'i Tourism Authority (HTA), in partnership with the counties and the respective visitor bureaus, developed community-based Destination Management Action Plans (DMAPs) that aim to **rebuild, redefine and reset** the direction of tourism over a three-year period. The focus is on **stabilization, recovery, and rebuilding to the desired visitor industry for each island**. The actions put forth in the DMAPs are guided by an island-based Steering Committee for each island, and include a collaborative process which encourages participation and vital input from the community, visitor industry and other sectors. The DMAPs identify areas of need as well as actionable solutions for enhancing the residents' quality of life and improving the visitor experience across the islands.

HTA's 2020–2025 Strategic Plan is organized around four interacting pillars—Natural Resources, Hawaiian Culture, Community, and Brand Marketing, with more emphasis on addressing tourism impacts and greater destination management. In it, HTA defined **Destination Management** to include:

- attracting and educating responsible visitors;
- advocating for solutions to overcrowded attractions, overtaxed infrastructure, and other tourism-related problems; and
- working with other responsible agencies to improve natural and cultural assets valued by both Hawai'i residents and visitors.

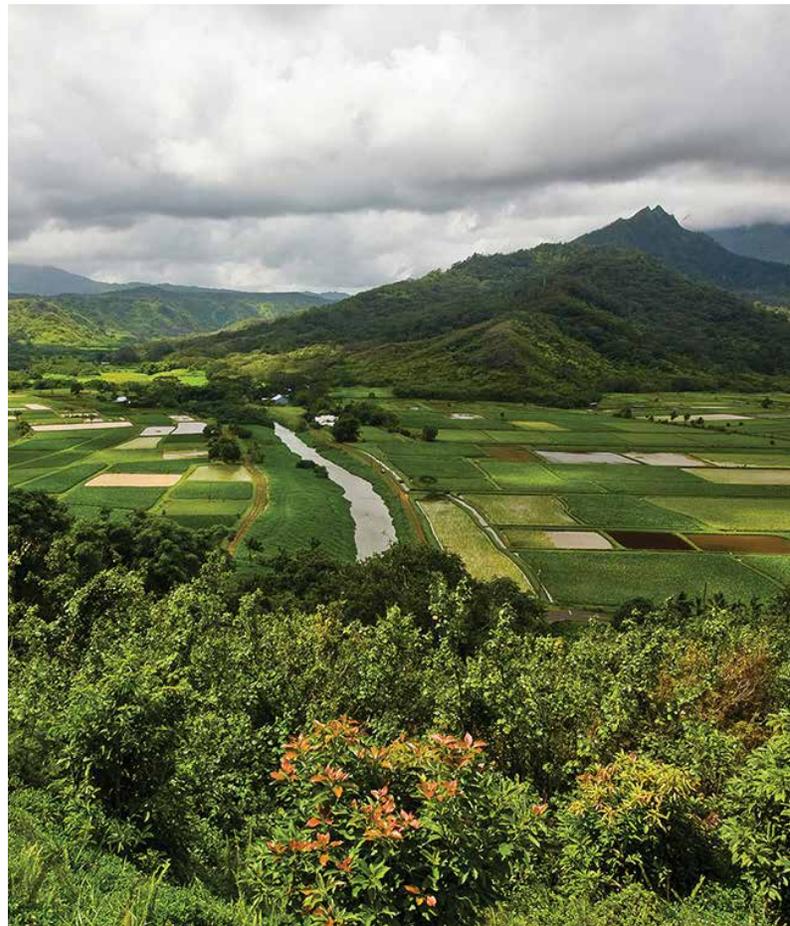
The DMAP initiative is a part of HTA's strategic vision and plan to manage Hawai'i tourism in a responsible and regenerative manner.

The idea of “regenerative tourism” gained momentum in 2020, especially as the global COVID-19 pandemic made people more aware of tourism's opportunities and vulnerabilities. What is regenerative tourism? About 15 years ago, the model for “sustainable tourism”

was instituted, built on tourism that was environmentally friendly, culturally sensitive and had less impact than mass volumes of visitors.

Regenerative tourism takes sustainability one step further and focuses on the net benefit of the visitor economy to a destination, looking at the social and cultural benefits. “Regenerative tourism is bolder and more inspiring. It aims not just to do less harm, but to go on and restore the harm that our system has already done to the natural world, and by using nature's principles, to create the conditions of life to flourish. It views wholes and not parts, and is a very different way of looking at the world.” (Anna Pollock, international tourism consultant and Founder of Conscious Travel)

Many of the actions in this plan take a regenerative tourism approach.



FORMATION OF THE DMAP

The process of the development of the Kaua'i DMAP started in July 2020 with the HTA, County of Kaua'i's Office of Economic Development and the Kaua'i Visitors Bureau (KVB) developing a list of Kaua'i residents who not only represented the visitor industry sectors (hotel, attractions, activities), different business sectors (e.g. agriculture, retail), the community (e.g. Hawaiian culture, education), and other nonprofit organizations, but also the communities that they live in. Invitations were sent, and 22 members volunteered their time to participate on the Kaua'i Steering Committee (see Acknowledgment section).

At the first Steering Committee virtual meeting, the members reviewed HTA's Strategic Plan in addition to the 2019–2021 Kaua'i Tourism Strategic Plan, including HTA's key performance indicators and four pillars, as well as the county's tourism strategies and situational analysis. These two plans are the foundation

of the Kaua'i DMAP. After the review, they critically examined destination attributes valued only by residents, only by visitors, and by both the residents and visitors. They also discussed the destination attributes that are at-risk or threatened. From there the Steering Committee brainstormed actions—what to protect or mitigate, what to preserve or grow, and where the gap can be closed or bridged. During the Steering Committee's second virtual meeting, the actions were then grouped, and overarching anchor actions and sub-actions were identified. They were presented to Kaua'i residents at two virtual community meetings via Zoom from October 21–22, 2020. More than 200 residents were in attendance. The community was encouraged to provide input at the virtual community meetings as well as through an online input form from October 14 to November 12. The results can be found on HTA's website.

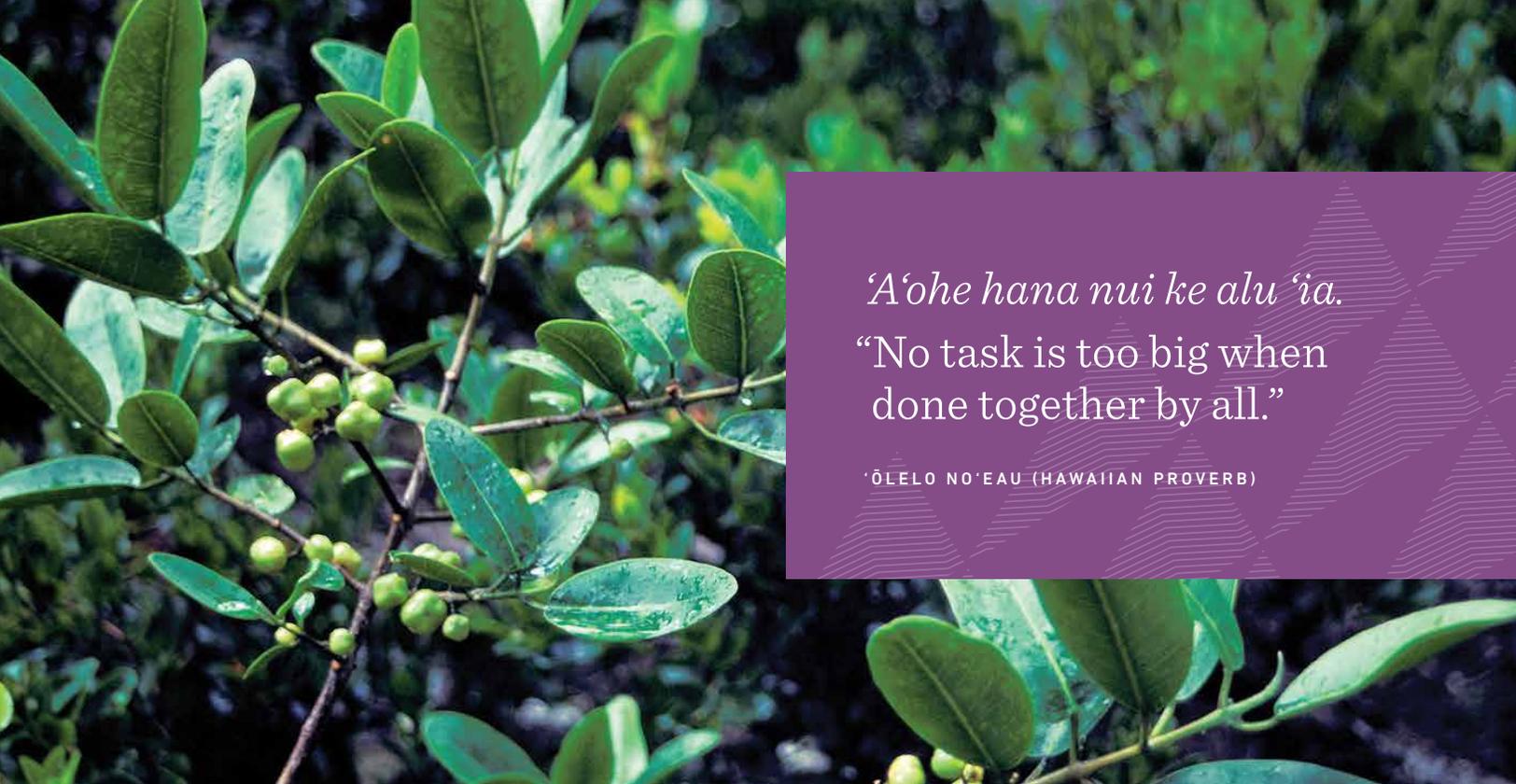
After reviewing the community feedback, the Steering Committee met virtually for a third time, and selected 10 anchor actions that the DMAP would focus on. Employees of HTA, the county, and KVB reviewed the proposed actions to verify they could be done under their respective purviews. In the end, nine final draft anchor and sub-actions were reviewed and approved by the Steering Committee at their last meeting. All of the actions were developed by the Steering Committee with input from the community.



Figure 1 Collaborative Process

IMPLEMENTATION FRAMEWORK

Hawai'i's tourism industry is at a critical point and residents' livelihoods depend on the recovery of the visitor industry—whether directly or indirectly. Tourism needs to be managed responsibly so that the residents and destination can thrive. HTA is leading many of the efforts in the Kaua'i Destination Management Action Plan. However, there needs to be collaboration and support of other state and county agencies, in addition to the community, visitor industry and other sectors, to help move the actions forward. This three-year plan is a living document that will be evaluated annually.



‘A‘ohe hana nui ke alu ‘ia.
“No task is too big when
done together by all.”

‘ŌLELO NO‘EAU (HAWAIIAN PROVERB)

II. Overview of Tourism in Hawai‘i

OVERALL TRENDS

Tourism has remained the primary economic driver for Hawai‘i’s economy across all islands. In 2019, tourism was 16.2% of Hawai‘i Gross Domestic Product (GDP), second to real estate and rental and leasing at 18.8% of Hawai‘i GDP. Jobs in the tourism industry accounted for 20% of total jobs in Hawai‘i while jobs in the real estate and rental and leasing sector accounted for 4.4% of total jobs. For the past eight years, the State of Hawai‘i’s visitor industry sustained annual growth in terms of arrivals and expenditures. In 2019, tourism was the largest single source of private capital for Hawai‘i’s economy. Total visitor spending reached \$17.84 billion (1.1% increase compared to

2018). Tourism generated \$2.08 billion in state tax revenue. A total of 10,424,995 visitors came to the Hawaiian Islands by either air service or cruise ship (5.4% increase over 2018).

The visitor industry has provided steady employment opportunities and supported the development of small businesses throughout the state. In 2019, tourism supported 216,000 jobs statewide. Hawai‘i experienced record arrivals over the past few years with no significant increase in the number of traditional lodging units (e.g., hotels and resorts), however, unpermitted short-term rentals grew in Hawai‘i’s neighborhoods.

Prior to the global COVID-19 pandemic, 2020 was set to be another year of record growth for Hawai‘i. However, in the first 10 months of 2020, visitor arrivals were down 73.4 percent to 2,296,622, with significantly fewer arrivals by air service (-73.4% to 2,266,831) and by cruise ship (-74.2% to 29,792). The average daily census or the number of visitors in Hawai‘i on any given day was 77,007 (68.7% decrease over year-to-date October 2019). Compared to year-to-date October 2019, the average length of stay increased by 17.9% to 10.23 days. This was a result of visitors

staying double-digit days during the state's trans-Pacific 14-day quarantine requirement that started on March 26, 2020. The state's pre-travel testing program started on October 15, 2020 as a way for travelers to bypass the mandatory quarantine requirement.

The majority of visitors to Hawai'i arrive by air, and thus air service to the islands is vital for Hawai'i's tourism industry. Total air capacity (number of seats) decreased 62.1 percent to 4,278,381 seats as a result of a reduction in air service to Honolulu (-59.9% to 2,803,908 seats), Kahului (-65.8% to 816,083 seats), Kona (-62.9% to 390,573 seats), Līhu'e (-68.6% to 258,853 seats) and Hilo (-77.4% to 8,964 seats).

Sails on the Hawai'i home-ported cruise ship, Norwegian Cruise Line's *Pride of America*, were suspended since April 2020 and out-of-state cruise ships were

not permitted into the islands due to the Center for Disease Control and Prevention's (CDC) "No Sail Order" from March 14 to October 29, 2020. Thereafter, the CDC took a phased approach to resuming passenger operations.

Hawai'i's unemployment rate increased from 2.6 percent in the first quarter of 2020 to 20.3 percent in the second quarter, and then decreased to 13.9 percent in the third quarter. DBEDT projects that for 2020 overall, the average annual employment rate will be at 11.2 percent, then decrease to 7.9 percent in 2021 and 7.1 percent in 2022. These rates are significantly higher than Hawai'i's average unemployment rate of 2.5% from 2017 to 2019.

TOURISM FORECAST

According to the Department of Business, Economic Development & Tourism's fourth quarter Outlook for the Economy, total visitor expenditures is forecasted to end the year at \$5.11 billion (-71.4%) with 2.73 million visitor arrivals (-73.7%). Economists predict that it will take a couple of years before Hawai'i's visitor industry recovers.

RESIDENT SENTIMENT

HTA conducts an annual Resident Sentiment Survey (RSS) to gauge resident attitudes toward tourism in Hawai'i and to identify perceived positive and negative impacts of the visitor industry on residents. Resident sentiment is important to maintain a healthy industry. The 2019 RSS report showed that resident sentiment had generally weakened compared to the previous year. The report identified that the visitor industry's impact on the resident's overall quality of life is essential to improving resident sentiment—the balance of economic, social and cultural, and community benefits from tourism. Furthermore, providing residents with a voice in tourism development, creating jobs with opportunities for advancement, and creating shopping, dining and entertainment opportunities are key to improving resident sentiment.



TOURISM ON KAUA'I

Visitor Statistics

In 2019, 1,370,029 visitors traveled to Kaua'i, resulting in 27,695 visitors on any given day compared to the resident population of 72,293. Total visitor spending was \$1.91 billion. On average, visitors stayed 7 days and spent \$189 per person per day. Half of the visitors stayed in hotels while condominiums, timeshare resorts and vacation rentals were also used. The majority of visitors were from the U.S., followed by Canada and Australia.

The global COVID-19 pandemic significantly affected visitor arrivals to Kaua'i. In the first 10 months of 2020, visitor arrivals dropped 73.8 percent to 298,708 visitors. The average length of stay grew 16.2 percent to 8.54 days. The average daily census was 8,367 visitors, a decline of 69.7 percent over the same period a year ago. There were significantly fewer airseats in the market year-over-year.

2019 Kaua'i Visitor Satisfaction

According to HTA's 2019 Visitor Satisfaction Report, U.S. visitors rated their Kaua'i visit "excellent" and were likely to recommend the destination. However, they expressed concerns about traffic and the destination being too expensive.

2019 Resident Sentiment

According to HTA's 2019 Resident Sentiment Report, residents felt that visitors were responsible for the traffic, showed no respect for the culture/'āina (land), and contributed to the cost of living and damage to the environment. Though there was an increase in residents who felt that "tourism has brought more benefits than problems," resident sentiment generally weakened. As mentioned previously, the visitor industry's impact on the resident's quality of life is key to improving resident sentiment, as they seek an equal balance of economic/social and cultural/community benefits from the industry.

Jobs

In the third quarter of 2020, Kaua'i County lost 8,500 jobs (-25.5% over the same quarter of 2019). Jobs decreased the most in the Accommodations sector which lost 4,300 jobs (-89.6%), followed by Food Services and Drinking Places which lost 1,400 jobs (-29.8%), Retail which lost 700 jobs (-17.1%), and Transportation, Warehousing, & Utilities lost 700 jobs (-41.2%). Year-to-date third quarter 2020, the unemployment rate increased to 16.7 percent compared to 2.7 percent during the same period a year ago.

Visitor Accommodations

Hotel occupancy for Kaua'i was at 36.0% year-to-date October 2020. During the same period the year prior, hotel occupancy was 72.6%, which is a -36.6 percentage difference. The average daily rate dropped slightly to \$269.82 (-3.7%) from \$280.28 in 2019. Room demand was 371,800 room nights or 62.6 percent lower than year-to-date October 2019. The room supply was 1.084 million room nights (-24.5%).

Looking at vacation rentals year-to-date October 2020, Kaua'i's unit demand was 307,784 unit nights (-62.9 percent) which resulted in a 45.2% occupancy rate (-40.7 percentage points) with an average daily rate of \$298.10 (-20.3%). Kaua'i's unit supply was 680,198, a 37.4 percent decrease over the same period a year ago. A vacation rental is defined as the use of a rental house, condominium unit, private room in a private home, or share room/space in private home. The report does not determine or differentiate between units that are permitted or unpermitted. The "legality" of any given vacation rental is determined on a county basis.

Situation Analysis Summary

On September 1, 2020, members of the Kaua'i Tourism Strategic Plan Steering Committee conducted a SWOT analysis to identify the destination's strengths, weaknesses, opportunities and threats.

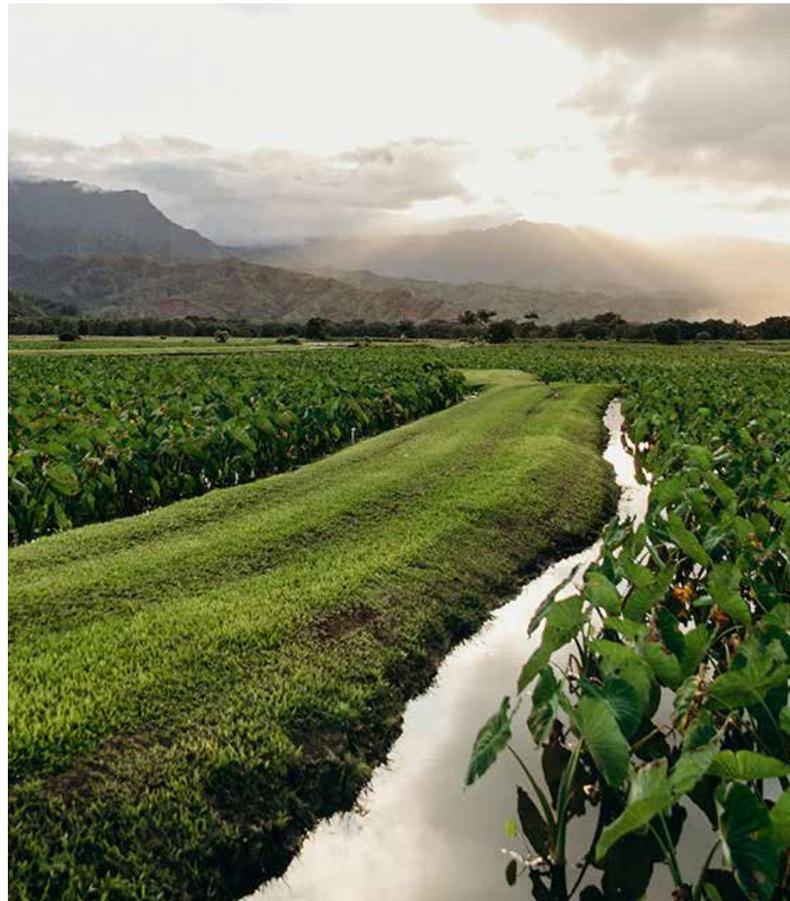
The group first looked at internal factors. In summary, Kaua'i has pristine, natural beauty and overall a great climate. The Native Hawaiian culture is cherished. Kaua'i's ruralness, small towns and community atmosphere also make the destination special. The aloha spirit permeates throughout. The island provides for relaxing, rejuvenating and healthy experiences for residents and visitors.

Of particular concern is state leadership with regards to the management of parks and the current COVID-19 crisis. Housing costs and the cost of living on Kaua'i also present challenges for its residents. The condition and maintenance of parks and bathrooms, management of resources and facilities, and overuse of some locations are areas for improvement. Traffic is also a top issue. There is a significant increase in unemployment and loss of jobs.

Externally, the group cited poor leadership at the state and federal levels as the top threat for Kaua'i, especially if communications amongst agencies do not improve. Residents' negative attitude towards tourism could hinder opportunities for new strategic tourism initiatives aiming to improve the destination experience and residents' quality of life. Travel restrictions relating to the state's 14-day quarantine and international travel could further delay the welcoming back of visitors and tourism. The wage imbalance and poverty are also areas of concern.

The ability to redefine and reinvent tourism for Kaua'i is ranked highest amongst opportunities for the destination. Efforts to encourage and promote sustainable tourism are in alignment with Kaua'i's values. More engagement and communications with the state (Governor's office, parks, transportation) and Federal Aviation Administration (FAA) agencies can

be improved for better partnership and management of areas and airseat capacity. Kaua'i is considered a COVID-safe destination and the ability to sustain it is essential. Mobility options can be expanded especially for visitors to move around the island via shuttles, ride sharing and bicycle paths, resulting in less dependency on daily car rentals.



Situational Analysis Summary

Table 1

Strengths

Kaua'i Enjoys...

- Natural Beauty & Climate Hawaiian Culture
- Rural/Small Town/Community
- Aloha Spirit
- Relaxing/Rejuvenating/Healthy
- Sense of Place
- Activities
- Strong Brand Awareness
- Plantation History
- Renewable Energy Leader

Opportunities

Kaua'i Can Potentially Take Advantage Of...

- Redefined/Reinvented Tourism
- Promoting Sustainable Tourism
- Improved Communications with State and Federal Government
- Sustaining as a COVID-Safe Destination
- Expanded Mobility Options
- Engaged Community
- Supporting Community Involvement/Voluntourism
- Transportation
- Festivals & Events
- Bike Path Expansion

Weaknesses

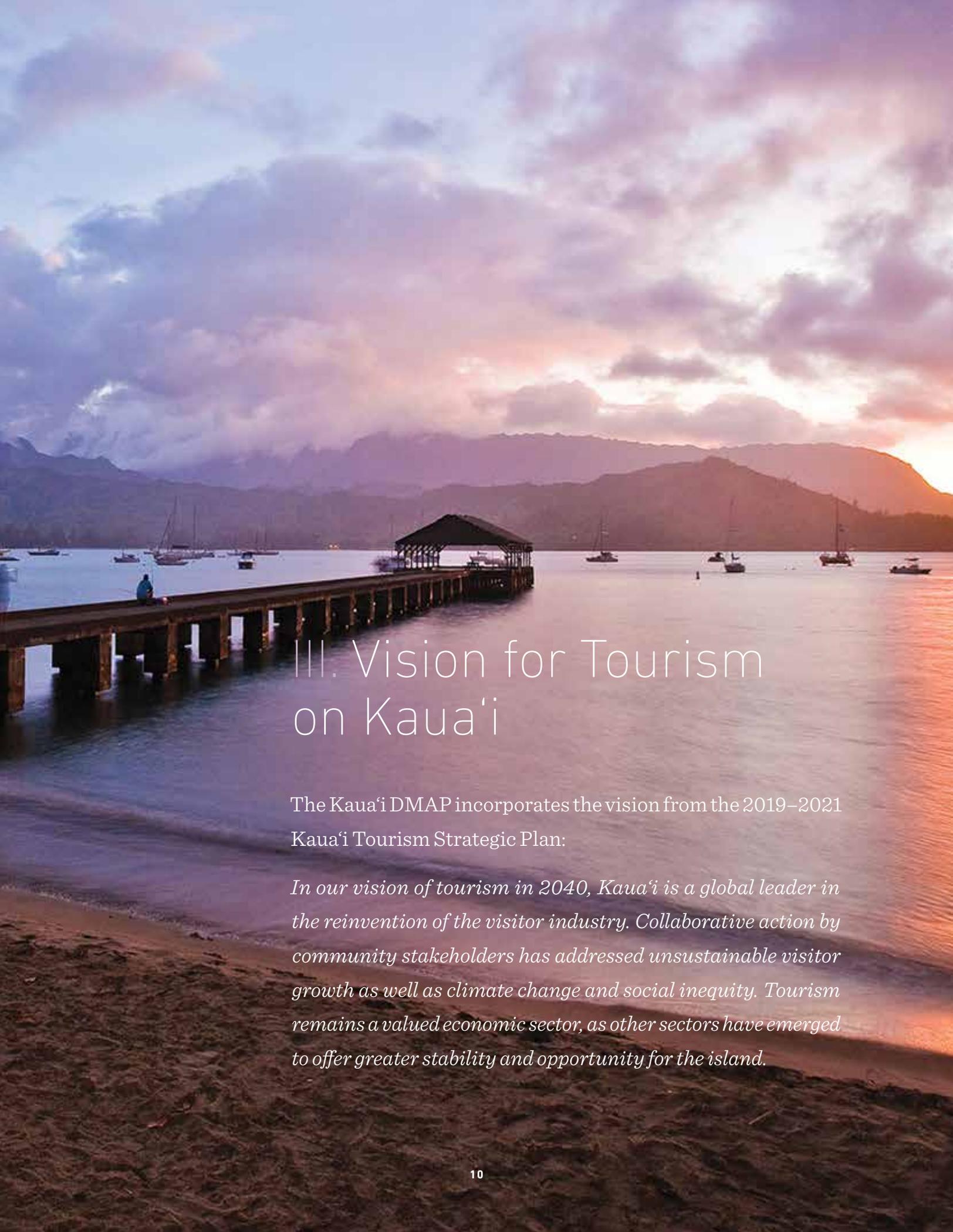
Kaua'i Faces...

- State Leadership
- Housing Costs/Cost of Living
- Parks: Conditions/Management/Overuse Traffic
- Unemployment/Loss of Jobs
- Resident Sentiment
- Air Dependence
- Dependency on Imports
- Gentrification
- Auto Dependence

Threats

Kaua'i Can Be Affected By...

- Poor State and Federal Leadership
- Negative Attitude Towards Tourism
- Travel Restrictions
- Climate Change
- Wage Imbalance/Poverty
- Airlift
- Uncertain Future
- Social Media
- Pandemics
- Labor Disputes



III. Vision for Tourism on Kaua'i

The Kaua'i DMAP incorporates the vision from the 2019–2021 Kaua'i Tourism Strategic Plan:

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.

IV. Goal

The goal of the Kaua'i DMAP is to **rebuild, redefine and reset** the direction of tourism over a three-year period.

V. Objectives

There are six objectives to achieve the goals and vision of the Kaua'i DMAP.

OBJECTIVE 1

Create positive contributions to the quality of life for Kaua'i's residents.

OBJECTIVE 2

Support the maintenance, enhancement, and protection of Kaua'i's natural resources.

OBJECTIVE 3

Ensure the authentic Hawaiian culture is perpetuated and accurately presented in experiences for residents and visitors, materials and marketing efforts.

OBJECTIVE 4

Maintain and improve visitor satisfaction of their experience on Kaua'i.

OBJECTIVE 5

Strengthen the economic contribution of Kaua'i's visitor industry.

OBJECTIVE 6

Increase communication and understanding between the residents and visitor industry.

VI. Actions

The following actions were developed by the Steering Committee and the community, and address what residents desire for Kaua'i's visitor industry and their communities. In a few instances, HTA took the essence of the community's feedback and transformed them into actionable initiatives.

The actions were shaped by overarching themes that were identified by the Steering Committee and also appeared in the community input:

- Better management and enforcement of laws that protect Kaua'i's natural resources.
- Management of the number of visitors.
- Education of visitors and residents.
- Transportation issues and infrastructure.
- Two-way communication and industry collaboration.
- Support for local businesses.

The actions were also cross-referenced against the four interacting pillars of HTA's strategic plan—Natural Resources, Hawaiian Culture, Community and Brand Marketing—to ensure alignment and for organizational purposes.

Natural Resources—Respect for Our Natural & Cultural Resources. Dedicate resources to programs that enhance and support Hawai'i's natural resources and cultural sites to improve the quality of life for all of Hawai'i's residents and to enhance the visitor experience.

Hawaiian Culture—Support Native Hawaiian Culture & Community. *Ho'oulu* (grow) the uniqueness and integrity of the Native Hawaiian culture and community through genuine experiences for both visitors and residents.

Community—Ensure Tourism & Communities Enrich Each Other. Work to make sure residents and local communities benefit from tourism by supporting projects valued by the community and aligned with the destination's brand and image; informing both residents and visitors of these projects and events; strengthening relations between residents and visitors; and forming partnerships to build a resilient tourism workforce and community.

Brand Marketing—Strengthen Tourism's Contribution. Take the lead in protecting and enhancing Hawai'i's globally competitive brand in a way that is coordinated, authentic, and market-appropriate; is focused on Hawai'i's unique culture and natural environment; and supports Hawai'i's economy by effectively attracting higher-spending, lower-impact travelers.

The following tables identify opportunities and needs for each of the anchor actions, including the identification of responsible agencies and timing of the action's commencement and/or delivery over a three-year period. As HTA carries out the DMAP, there will be more organizations and businesses identified to help move this plan forward.

The long-term **measures of success** will be measured through HTA's Strategic Plan's four overall Key Performance Measures: Resident Satisfaction, Visitor Satisfaction, Average Daily Visitor Spending, and Total Visitor Spending. A "milestone" is a qualitative way of determining progress toward accomplishing a specific defined action. The **milestones for success** are the completion of each sub-action in the phase indicated.



RESPECT FOR NATURAL AND CULTURAL RESOURCES

Action A

Focus policy efforts on appropriate behavior that will instill value in both visitors and residents for our natural and cultural resources (mālama ‘āina).

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|---|--|---------|---|---|
| | | | 1 | 2 | 3 |
| A.1 | Include Department of Land and Natural Resources (DLNR) on all discussions and find ways for state and county departments to work together. | L = County, KVB S = HTA | X | X | |
| A.2 | Explore and implement a universal user fee model to help offset maintenance costs at beaches and parks. Advocate for the adjustment of usage fees (camping permits) to target different levels of users and instill better management of illegal users. | L = HTA S = DLNR, County | X | X | |
| A.3 | Support and promote DLNR’s App (DLNRtip) which allows citizens to help with enforcement and creates public awareness. | L = HTA, County, KVB | X | | |
| A.4 | Identify and provide more informational signage at cultural sites, beaches and hiking spots for safety, education and a great experience. | L = HTA S = County, DLNR | | X | X |
| A.5 | Educate tour operators and boating companies about proper etiquette to deter ocean and reef pollution. | L = Sustainable Tourism Association of Hawai‘i S = HTA, DLNR | X | X | X |
| A.6 | Advocate for more stringent and intentional inspections/enforcement of camping/hiking gear and shoes upon arrival at the airport. | L = HTA S = Dept of Agriculture, U.S. Customs and Border Protection | X | X | X |
| A.7 | Support awareness and education of appropriate behavior towards endangered species such as Hawaiian monk seals, sea turtles, Newell’s Shearwaters, kōloa maoli (native ducks) and native birds. | L = HTA S = County, DLNR, NOAA | X | X | X |
| A.8 | Advocate for increased ranger presence and enforcement at county and state parks. | L = County S = HTA | X | X | X |
| A.9 | Conduct assessment of North Shore beach accesses and remediate to assure use for subsistence and traditional uses. | L = County S = HTA | | X | X |

Action B

Collaborate with State of Hawai'i Department of Land & Natural Resources (DLNR) to develop and implement policies to increase monitoring and enforcement efforts.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|---|-----------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| B.1 | Include DLNR on all discussions and find ways for state and county departments to work together. | L = County S = HTA | X | X | X |
| B.2 | Advocate state/county partnerships with organizations to steward sites. Explore HTA's role in being a liaison between DLNR and Hawaiian lineage descendants for land stewardship. | L = HTA S = DLNR, County | X | X | X |
| B.3 | Advocate for DLNR staff training and education. | L = HTA | X | X | X |
| B.4 | Advocate for increased state funding within DLNR for natural resource protection, watershed management, maintenance and development of trail networks, and protection of shoreline and nearshore marine resources, all paired with increased island-specific control and input in such efforts. | L = HTA, County | X | X | X |
| B.5 | Encourage DLNR to review regulations for commercial boat and kayak tours along the Nāpali Coast, including schedules and capacity at the Kikiaola Boat Harbor and Port Allen. Implement restrictions if deemed necessary. | L = HTA S = County | X | X | |

HAWAIIAN CULTURE

Action C

Invest in Hawaiian cultural programs and identify funding sources that enhance the visitor experience and connect both tourism and communities.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|--|---|---------|---|---|
| | | | 1 | 2 | 3 |
| C.1 | Develop training programs relating to Hawaiian textiles and weaving targeted at visitors and locals. | L = County S = HTA, State Foundation of Culture & the Arts | X | X | X |
| C.2 | Work with hotels to provide cultural and history classes that guests can attend. Examples include lei making or making poi. | L = HTA S = KVB | X | X | |
| C.3 | Develop a video to educate groups (corporate, weddings, other larger parties) about cultural values and respecting the 'āina and ocean. Encourage viewership of the video. | L = HTA S = KVB, County | X | | |
| C.4 | Support activities like kanikapila songfests featuring Hawai'i's music and musicians. | L = HTA S = County, KVB | | X | X |
| C.5 | Support educational programs at cultural sites and invest time into mālama sacred sites such as heiau (temples or places of worship) and resources such as the kai (ocean). | L = HTA S = County, KVB | | X | X |
| C.6 | Connect Hawaiian culture organizations with the visitor industry to help grow, enhance and design their programs and offering. Explore creating a resource team. | L = HTA S = Native Hawaiian & Hospitality Association, County, KVB | X | X | |
| C.7 | Develop ways to bridge cultural practitioners with the visitor industry and small businesses, such as connecting to meetings, conventions and incentives markets, ground operators, destination management companies, festivals and events. Explore the creation of a resource list of cultural practitioners. | L = HTA S = NaHHA, Kaua'i Native Hawaiian Chamber of Commerce | X | X | |

COMMUNITY

Action D

Focus policies that address overtourism by managing people while on Kaua'i.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|---|--|---------|---|---|
| | | | 1 | 2 | 3 |
| D.1 | Assess and set specific site visitor limits, and create site management plans/develop and implement tourism capacity management models at “hotspot” areas. Allot rest days for hotspot areas. | L = DLNR S = County | X | X | X |
| D.2 | Pilot a reservation system to manage capacity of visitors and explore feasibility of expanding to other hotspot areas. | L = HTA S = DLNR, County | X | X | |
| D.3 | Continue the county's stringent shut down of illegal transient vacation rentals (TVRs), such as the partnership with Airbnb and Expedia. | L = County S = HTA | X | X | X |
| D.4 | Explore and understand land use, zoning and permitting to manage number of future visitor accommodations on Kaua'i based on current infrastructure, and improve infrastructure. Create a white paper to document findings. | L = County S = DOT Airports, HTA | X | X | X |
| D.5 | Explore ways to count and manage the movement of visitors and residents at identified hotspot areas to prevent the degradation of natural resources, alleviate congestion, and manage the area. Strive for a systematic mechanism to monitor different areas. | S = County, Highways Dept, DBEDT/ Energy Division, HTA | X | X | X |

Note: It has been suggested that we limit the number of visitors to the island of Kaua'i, as well as the number of rental cars. Unfortunately, HTA has no control over these areas. The free movement of people to travel to the islands and between the islands falls under federal jurisdiction. Further, businesses are free to operate in the islands so long as they do not break any laws. The goal of the DMAP meetings was to gather input from the community regarding how to manage tourism on the individual islands before and after the visitors arrive as well as how we mālama the visitors, and each other, once the visitors are here. This includes considerations around protecting our 'āina and perpetuating the Hawaiian culture. This does not, however, include deciding who can and cannot come to Kaua'i specifically, or to Hawai'i in general, since we have no control over that.

Action E

Encourage low-impact green rides to improve the visitor experience, reduce island traffic, increase small business opportunities, and meet climate action goals.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|--|-------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| E.1 | Foster and promote diverse mobility choices so that visitors may elect alternatives to renting cars for their entire stay. | L = County S = HTA | X | X | X |
| E.2 | Continuously examine the movement of visitors around the island, including popular visitor attractions and beach destinations, and encourage the development of public-private shuttle systems from the airport and in major Visitor Destination Areas (VDAs). | L = County S = HTA | X | X | |
| E.3 | Meet with and discuss with rental car agencies and car sharing companies to provide electric vehicles, and increase incentives to install EV (Electric Vehicles) chargers at the airport and at potential high-use car share locations. | L = County S = HTA | X | | |
| E.4 | Create incentives for visitors to choose alternative transportation options such as separating parking costs from resort fees and implementing paid parking at beaches and other parking-limited destinations. | L = County S = HTA | X | X | X |

Action F

Increase communication, engagement and outreach efforts with the community, visitor industry, and other sectors.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|--|----------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| F.1 | Explore new ways to communicate with the residents and visitor industry to share information and increase understanding. Create a communications plan. | L = HTA S = County, KVB | X | X | X |

BRAND MARKETING

Action G

Develop educational materials for visitors and new residents to have respect for our local cultural values.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|---|----------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| G.1 | Create a list of organizations to work with to build an educational program. | L = HTA S = County, KVB | X | | |
| G.2 | Review existing publications that address respect for Kaua'i's local cultural values. Explore the creation of a "Kaua'i 101" curriculum for visitors and new residents. | L = HTA S = County, KVB | X | X | |
| G.3 | Work with Hawaiian cultural practitioners when developing education materials so that the Hawaiian culture is portrayed accurately for the visitors. | L = HTA S = County, KVB | X | X | |
| G.4 | Create an educational video about entering Hawai'i and the history, culture, people and environment of Kaua'i. Look at the feasibility of an inflight video, and playing it at the airport. | L = HTA S = County, KVB | X | X | |
| G.5 | Explore developing content for social media—"home grown media"—to showcase Kaua'i local culture. | L = HTA S = County, KVB | X | X | |

Action H

Promote "Shop Local" to visitors and residents.

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|--|----------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| H.1 | Expand the <i>Kaua'i Made</i> program, market, promote, and brand beyond Kaua'i's shores. Explore an "Aloha for Kaua'i" type of online-portal. | L = County S = HTA, KVB | X | X | X |

Action I

Support Diversification of Other Sectors

| ACTION NO. | ACTION | LEAD (L) SUPPORT (S) | PHASING | | |
|------------|---|----------------------------|---------|---|---|
| | | | 1 | 2 | 3 |
| I.1 | Support and preserve Kaua'i's agriculture industry, such as value-added products and agritourism through amended rules/regulations. | L = HTA, County S = KVB | X | X | X |



VII. Tourism Hotspots

A “hotspot” is an area or site that attracts visitors due to its popularity, which may result in overcrowding, congestion, degradation of resources, safety hazards, and a negative experience for both residents and visitors.

While HTA is not an enforcement agency, it can be a catalyst to bring together respective state and county agencies, the community and private sector to develop solutions that address hotspot sites and areas.

HTA reviewed the community’s input from the surveys and community meetings, in addition to feedback from the county, KVB, and Kaua’i Steering Committee. Below are the hotspot areas and sites that HTA will monitor together with the respective agencies as needed to help mitigate issues.

Other areas and sites were identified, but the locations of utmost concern are:

- Polihale State Park (accessibility)
- Kōke’e and Waimea Canyon
- Nāpali and Kalalau Trail (access and safety)
- Salt Pond Beach Park and surrounding area
- North Shore
 - From Hanalei Bridge to the end of the road at Ke’e Beach (capacity)
 - Hanalei Bay (access)
 - Ke’e Beach (access and capacity)
 - Hā’ena (access and capacity)
 - Hanakāpī’ai
 - Anini Beach
- Po’ipū Beach (safety)
- Queen’s Bath (access and safety)
- Kapa’a (traffic)
- Old Kōloa town (parking)
- Wailua River State Park

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Glossary

Average Length of Stay Number of days visitors are on the island, including the day of arrival and the day of departure.

Average Daily Census Average number of visitors present in Hawai'i on a single day.

Regenerative Tourism Regenerative tourism is “creating the conditions for life to continuously renew itself, to transcend into new forms, and to flourish amid ever-changing life conditions” (Hutchins and Storm, 2019)—through tourism. It “recognizes its communities and places are living systems, constantly interacting, evolving, self-organizing, efficient, learning, distinct, and vital to create abundance, balance and conditions to support other life, resilience and contribute to a greater system of well-being.” (Earth Changers, 2020)

Sustainable Tourism Development that meets the needs of present tourist and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems. (World Tourism Organization)

Per-Person Per-Day Spending Total spending of an individual on a given day during their stay.

Visitor Out-of-state traveler who stayed in Hawai'i for a period of time between one night, but less than one year.

Visitor Days Total number of days visitors are on the island and/or in the state.

Visitor Destination Area (VDA) The three main visitor destination areas on Kaua'i are in Princeville, Po'ipū, and Kapa'a.

Total Visitor Spending The U.S. dollar amount spent in Hawai'i attributed to a visitor. This includes direct spending by visitors while in Hawai'i, as well as any prepaid package purchased before arrival. The expenditure data does not include trans-Pacific airfare costs to-and-from Hawai'i, commissions paid to travel agents, or portions of the package in another state or country.



APPENDIX A

Actions for Future Consideration

The following actions were considered by the Kauai Steering Committee, but did not make it to the top 10 priority actions. Should the 10 priority actions be completed before the end of the DMAP, HTA will revisit these actions:

- Address visitor safety.
- Monitor to address helicopter noise pollution.
- Redefine brand to promote “regenerative tourism” (i.e. ecotourism, voluntourism, agritourism).
- Inspection of tour operators (tour guides/ tour operators).
- Increase offerings of group tours.
- Discourage vendors from associating Kauai with feral chickens, an invasive species and nuisance species with diseases and parasites that can spread to people, agricultural animals, and native birds.

APPENDIX B

Other Areas Identified to be Managed More Intentionally

The following is a list of other areas that were identified to be managed more intentionally. These sites were not mentioned as often as the sites listed on page 19.

| | |
|-------------------------------|--|
| Alomanu | Kilauea Point National Wildlife Refuge |
| Anahola | Kipu Kai |
| Burns Field | Lumahai |
| Halelea parks | Māhā’ulepū |
| Hanapēpē | Mauka Waitua |
| Ho’opi’i Falls | Mcbryde coastal |
| Kalihiwai | Nāwiliwili |
| Kawai’ele Waterbird Sanctuary | ’Ōpaeka’a Falls |
| Kealia | Secrets Beach |
| Kekaha | Wainini |

APPENDIX C

Sources

Department of Business, Economic Development & Tourism’s County Economic Conditions:

<https://dbedt.hawaii.gov/economic/qser/county/>

Hawai’i Tourism Authority (HTA) Annual Visitor Research Report 2019:

<https://hawaiitourismauthority.org/media/5062/2019-annual-report-final-for-posting.pdf>

HTA November 2020 Monthly Visitor Statistics:

<https://hawaiitourismauthority.org/research/monthly-visitor-statistics/>

HTA Visitor Satisfaction & Activity Reports:

<https://hawaiitourismauthority.org/research/visitor-satisfaction-and-activity/>

HTA Resident Sentiment Survey Update 2019:

<https://hawaiitourismauthority.org/media/4268/resident-sentiment-board-presentation-02-27-20.pdf>

Hawai’i Hotel Performance Report October 2020:

<https://hawaiitourismauthority.org/media/5744/hta-october-2020-hawaii-hotels-performance-final.pdf>

Hawai’i Vacation Rental Performance Report October 2020:

<https://hawaiitourismauthority.org/media/5747/hta-october-2020-hawaii-vacation-rental-performance-final.pdf>

