

**MAUI COUNTY
TOURISM STRATEGIC PLAN
2006-2015**

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I. Executive Summary

The completion of the *Maui County Tourism Strategic Plan: 2006-2015 (Maui County TSP)* represents the second phase of the tourism industry planning effort following the completion of the *Hawai'i Tourism Strategic Plan: 2005-2015 (State TSP)* published in 2004.

As the State TSP was being developed, and residents and tourism industry stakeholders from all islands were consulted, it became apparent that each county would benefit from a more localized, tourism strategic plan. In 2005, the Hawai'i Tourism Authority (HTA) funded the development of these plans for the City and County of Honolulu, Kaua'i County, Hawai'i County, and Maui County.

The Maui County TSP reflects the desires and input of Maui, Moloka'i and Lāna'i tourism stakeholders including residents, state and county representatives, and individuals in both public and private sectors. Helping to oversee development of the plan throughout the 15-month process was the Maui County Tourism Strategic Plan Advisory Committee, with members also representing a broad range of tourism stakeholders from all three islands.

Based on collective input, Maui County residents clearly appreciate and respect the beauty of their lands and seas, the indigenous Hawaiian culture and ethnic cultural diversity, as well as the many communities that contribute to each island's unique sense of place. It is these attributes that make each of the islands in Maui County wonderful places to live and visit.

Residents of Maui County recognize the benefits and contributions of the visitor industry – including its ripple effect that supports other industries – but are feeling the strains of resident growth, high visitor counts, insufficient infrastructure to support increasing demands and usage, and a high cost of living. They are looking to the visitor industry, which generates 39% of the Gross County Product, to help ensure a quality of life that is enjoyed by all residents. The Maui County TSP begins to address the challenge of balancing the economic needs of the county, along with the needs of residents, the natural and cultural environment, and the needs of the visitor industry and visitors. This balanced approach to tourism is reflected in their vision:

By 2015, tourism in Maui, Moloka'i and Lāna'i will:

- Honor the people and heritage of each island;
- Support and enhance the quality of life for residents;
- Value and perpetuate the natural and cultural resources of all islands;
- Engender mutual respect and partnership among all stakeholders;
- Support a vital and sustainable economy; and
- Provide a unique sense of place that will be memorable and enriching for visitors.

While each island is faced with varying workforce issues, as well as finding ways to preserve and protect natural and cultural resources, and ensuring the safety and security of residents and visitors, they also face unique opportunities and challenges.

Maui Island*Challenges*

- High hotel occupancy and disappearing “shoulder or slow periods” are contributing to a strong industry today, but leave little room for significant growth, especially with no development zoned or permitted for the near future.
- With high average daily room rates, service expectations will also remain high. The challenge for Maui Island is being able to provide the level of service expected by visitors, in addition to finding solutions to secure an adequate number of skilled workers to meet those expectations who can also afford the cost of living on the island.
- Many visitor industry workers must commute from their homes to the well-defined resort or visitor areas on Maui Island. With increasing resident and visitor traffic, ensuring that supporting infrastructure adequately meets the increased usage is paramount to ensuring a quality of life that is enjoyed by all residents.

Opportunities

- With its strong destination brand, Maui Island is well poised to continue to attract visitors, and through targeted marketing efforts, should be able to attract desired target markets that will stay longer and actively experience the island.
- Natural beauty, cultural activities, sporting events, festivals, spas, fine dining to local eateries, agri-tourism experiences, retail and more – Maui offers a diverse range of experiences for visitors and residents to enjoy. Coordination and planning of events and festivals to attract visitors during shoulder or slower periods will maximize benefits for all.
- Efforts are already underway to provide affordable housing options. These efforts will enable more people to live and work on Maui Island and provide a larger base for a Maui Island visitor industry workforce.
- Education and training programs to provide more skilled workers for the visitor industry already exist. Increased awareness and support for these programs will help ensure opportunities for Maui Island residents to obtain the necessary skill sets to be able to have meaningful careers in the visitor industry.

Moloka‘i*Challenges*

- Currently, the Maui Visitors Bureau is responsible for directing the marketing efforts for Moloka‘i. However, Moloka‘i residents support a change that would provide for an on-island marketing coordinator to manage these efforts.
- Moloka‘i residents describe their island as providing unique, outdoor and natural experiences with an emphasis on Hawaiian culture. They seek to attract visitors who are respectful of the place and appreciate these unique qualities.

Opportunities

- In February 2006, the Moloka‘i Responsible Tourism Initiative was published. Together with the strategies listed in the Maui County TSP relating to Moloka‘i, successful implementation will ensure a tourism future for the island that benefits both residents and visitors.

Lānaʻi

The two major accommodations on Lānaʻi are both high-end luxury, with many of the island residents working to staff these properties. Lānaʻi residents value their island's history, culture and natural resources, and feel visitors need to be better educated before and during their stay on the island.

There are seven objectives in the Maui County TSP that were developed to achieve the vision for tourism, and each is applicable to Maui, Molokaʻi and Lānaʻi islands:

1. To increase the economic contribution of the visitor industry to Maui County.
2. To make positive contributions to the quality of life for residents, including addressing livable wages and benefits within the visitor industry workforce, increased business opportunities, affordable workforce housing, and supporting communities in their efforts to retain their sense of place.
3. To increase communication, interaction and understanding between stakeholder groups, especially between residents and the visitor industry.
4. To maintain and improve visitor satisfaction with their experiences on each island.
5. To reinforce authentic Hawaiian culture, ensuring the foundation of our unique sense of place and appropriate recognition of our culture.
6. To support the enhancement and maintenance of natural resources of Maui county.
7. To establish an oversight mechanism for ensuring plan implementation and scorecard tracking, including regular plan reviews and revisions as necessary.

Each of the objectives has a list of strategies and high level performance benchmarks to track progress being made against objectives. Applicable strategies for individual islands are clearly marked. Strategies are also supported by action plans, listed in a separate document, which include specific action steps, and identify recommended lead and supporting organizations, as well as desired outputs.

Ultimately, the Maui County TSP establishes an overall direction for all tourism stakeholders to move forward in a coordinated and complementary path. To help ensure success, this plan must continue to be embraced and supported by residents, state and county governments, and all tourism stakeholder groups on Maui, Molokaʻi and Lānaʻi. Additionally, other plans and processes should also be integrated with the Maui County TSP to ensure consistency and progression towards achieving the tourism vision.

II. Introduction and Background

The Maui County Tourism Strategic Plan (Maui County TSP) reflects the collective feedback and input of Maui, Moloka‘i and Lāna‘i residents, the visitor industry, state and county governments, cultural organizations, educational institutions and many others in private and public sectors. Additionally, plans like Focus Maui Nui and the Moloka‘i Responsible Tourism Initiative, news articles, research and other related information were reviewed and considered in the development of this plan.

The values underlying the Maui County TSP resonate in the vision and this strategic plan, filtering through the goals, objectives, and strategies. It was made clear by the Maui County visitor industry stakeholders throughout the planning and development process that they believed a healthy land nourishes healthy people. Stated in the Hawaiian language, *“Ola ka ‘Āina, Ola ke Kānaka – Healthy Land, Healthy People.”* When there is focus on the land and attention given to the people who live on Maui, Moloka‘i and Lāna‘i, things will be *pono* or right.

The Maui County TSP represents a balanced approach – one that considers the desires of residents, interests of visitors, the protection and preservation of natural and cultural resources, and the economic needs of the county.

A. Purpose of the Plan

This Maui County Tourism Strategic Plan:

- Reflects island knowledge and the desires of Maui, Moloka‘i and Lāna‘i stakeholders, including visitor industry representatives, government officials, and community residents.
- Establishes an overall direction for all visitor industry stakeholders to move forward in a coordinated and complementary path.
- Can serve as a guide to county, state (including Hawai‘i Tourism Authority) and federal government decision makers in developing policy, and in advocating for the allocation of resources to improve the visitor industry in Maui County.
- Will be integrated with other plans and processes to create opportunities for partnerships.

B. State and County Plans

To ensure a vital, competitive, and sustainable visitor industry, benefiting both residents and visitors, the State Tourism Strategic Plan: 2005 - 2015 (State TSP) was developed with statewide community input and completed in 2004. During the development process, the need for county level tourism strategic plans was identified. Development of the plans for each of the four counties began during the summer of 2005 and was completed just over a year later.

C. Development Process

As part of the Maui County TSP planning process, the Honorable Mayor Alan Arakawa invited community members to actively participate on the Maui County TSP Advisory Committee and to help draft the plan. This committee was comprised of individuals representing a broad range of visitor industry stakeholder groups, including representatives from each of the three islands – Maui, Moloka‘i and Lāna‘i. In addition, broader community input was obtained through meetings held on each island, as well as through various one-on-one interviews with stakeholders.

A timeline of key events during the Maui County TSP planning process is included in Appendix B. A summary of community input from each of the three islands is included in Appendix C.

D. Implementation Framework

An oversight committee, convened by the County of Maui Office of Economic Development (OED), will drive successful implementation of this plan. Members may include the Maui Visitors Bureau and others to ensure the participation and support of affected stakeholders who have a role in this effort, and to encourage the involvement of the private sector, community organizations, residents, visitors and other major stakeholders in the visitor industry future on Maui, Moloka‘i and Lāna‘i. The role of the oversight committee will be to monitor plan performance, problem-solve, and serve as a vehicle to network and share information about the progress of the plan among key stakeholders. The monitoring of plan performance will also be a key part of the oversight process, including the collection, review, and development of scorecard measures toward meeting plan objectives.

III. Overview of Tourism

A. State Level

1. Historical Trends

The visitor industry has been the economic mainstay of Hawai'i since statehood in 1959. Despite periods of decline caused by global, national and local impacts, like the Persian Gulf War, weakened economies, Hurricane 'Iniki, the terrorist attacks of September 11, 2001, and other impacts, Hawai'i tourism rebounded mid-way in the 2000s and showed record numbers in 2005.

In 2005, the State Department of Business, Economic Development, and Tourism (DBEDT) reported that nearly 7.5 million tourists visited the state and generated \$11.5 billion in visitor expenditures. At present, 2006 is on track to be another strong year with visitor arrivals through April up 2.1% over 2005, and visitor expenditures reaching \$3.8 billion.¹

Tourism touches nearly all aspects in Hawai'i and is the primary source of revenue for the community through visitor expenditures and tourism-related capital investment. As the chief generator of employment in the state, the visitor industry accounts for 22.3% of all Hawai'i jobs.²

2. Critical Issues Facing Hawai'i Tourism

While Hawai'i tourism is booming, new opportunities and challenges emerge for Hawai'i residents and the visitor industry. Many of the opportunities and challenges are described in the State TSP and, as expected, are continuously evolving. Below are highlights of key issues in 2006:

- Finding a Sustainable Balance

Residents have said in community meetings that they welcome visitors, but foremost, the state needs to ensure Hawai'i remains a good place to live - that residents have a good quality of life. With an increasing resident population and record numbers of visitors, residents continually raise the question - how many residents and visitors can the state and each island support with current infrastructure levels, natural resource constraints, and resident tolerance? Equally important is finding ways to preserve and protect the native Hawaiian culture, the indigenous culture linked to the land of Hawai'i.

¹ DBEDT Monthly Visitor Statistics 2005 and April 2006

² State of Hawai'i Department of Labor and Industrial Relations

- Critical Components of a Healthy Industry

- *Adequate, Affordable Airlift*

To be able to travel to the islands, visitors need an adequate supply of air seats at prices they are willing to pay. A key concern is the reduction in the total number of air seats from Japan, started in October 2005, due to lower demand. Additionally, the higher cost of oil will continue to affect ticket prices, which impact destinations like Hawai'i that require longer flights.

- *Accommodations Capacity*

The total number of traditional hotel units is expected to increase only moderately between 2006 and 2010 with planned developments and improvements.³ With limited accommodations available statewide, Hawai'i must attract the right mix of visitors who can, and will, boost the economy by actively experiencing what the islands have to offer.

- *Visitor Satisfaction*

For years, Hawai'i has been successful as a tourist destination. The challenge lies in finding ways to keep the tourism product fresh and unique, even as other destinations are offering seemingly similar features. Additionally, the high demand for Hawai'i hotel rooms has resulted in average daily room rates (ADR) increasing 20% in two years, reaching an average \$167 statewide (Maui had the highest ADR at \$214).⁴ To combat "sticker shock" and exceed expectations, service levels and the quality of the visitor experience have been identified as critically important.

- *A Sufficiently Numbered and Skilled Workforce*

The availability and quality of a visitor industry workforce is critical to delivering high service levels and maintaining visitor satisfaction. With Hawai'i unemployment hovering at or under 3% in 2006,⁵ increasing overall workforce readiness, providing training programs, and attracting qualified workers to the visitor industry are key areas that need to be addressed.

- Managing State and County Issues

As Hawai'i tourism is much more complicated today than when it was in its infancy, so too are the myriad of state and county issues that need to be managed. Exhibit 1 illustrates the overall tourism vision for the state and county, and how state and county plans support each other to play a role in achieving multiple objectives for stakeholders.

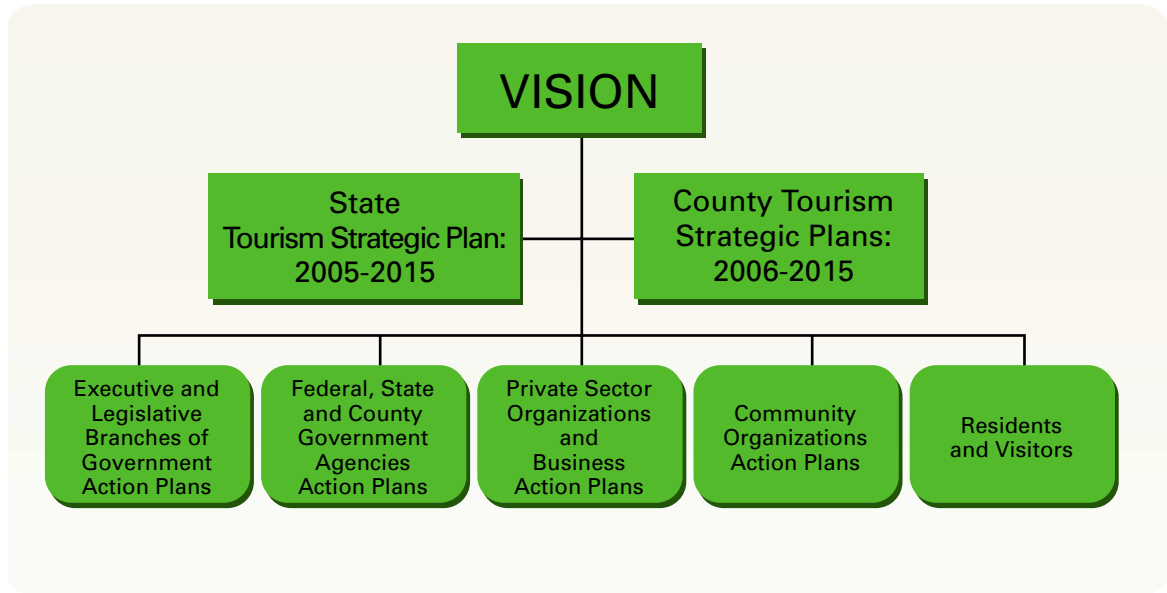
Cooperation, collaboration, and participation by all stakeholders will be required to attain success. When this is done right, a healthy land, healthy people, and a healthy visitor industry will flourish.

³ Analysis of Trends in Accommodations Supply, with Focus on Condominium and Timeshare Conversions, Hospitality Advisors LLC, September 2005

⁴ DBEDT Monthly Visitor Statistics 2005, December

⁵ State of Hawai'i Department of Labor and Industrial Relations

Exhibit 1: State and County Tourism Strategic Plans



B. Overview of Tourism on Maui, Moloka'i, and Lāna'i

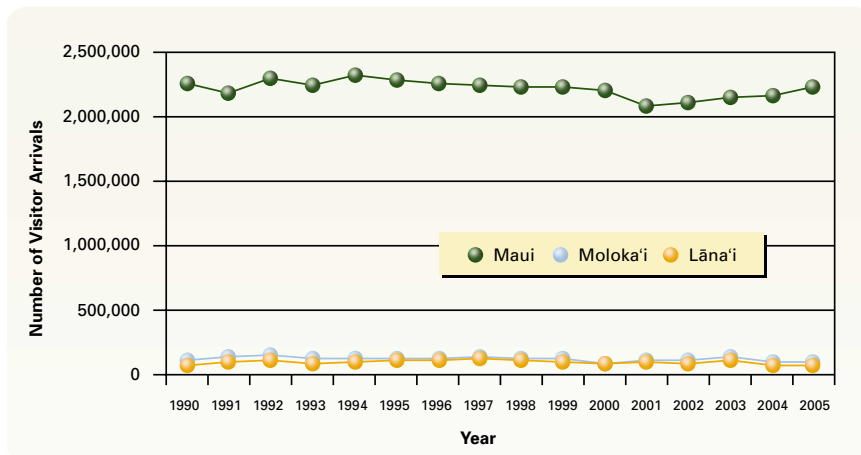
Maui County is comprised of three inhabited islands - Maui, Moloka'i and Lāna'i, with one uninhabited island called Kaho'olawe. Each island is unique and special in providing visitors with memorable experiences. The island of Maui offers miles of beaches and marine resources, premiere resort communities, and Haleakalā, the largest dormant volcano in the world. On Lāna'i, known as the most secluded island, visitors can experience luxury resorts, world-class diving, and a natural island environment. Moloka'i, known as the Hawaiian Isle, provides visitors with opportunities to enjoy unique Hawaiian outdoor experiences and natural beauty, including the world's highest sea cliffs, Hawai'i's longest waterfall, and the largest white sand beach in the state.

Visitors to Maui County can experience the Hawaiian culture and its other diverse multi-cultural heritages, the aloha spirit, soft adventure, diverse activities, and an array of natural and historical sites. A major challenge and opportunity for Maui County is that the three islands offer different experiences that will likely appeal to different visitor segments.

1. Maui County Trends, Accommodations, and Workforce

Tourism plays a significant role in the economy of all three islands, with each island experiencing fluctuations in the number of tourists over the past fifteen years. During the 1990s, Maui, Moloka'i, and Lāna'i experienced a steady pace of visitor arrivals. However, after the tragedy of September 11, 2001, all islands experienced a decline in the number of visitors. Only Maui has experienced a rebound since that time, with 2005 visitor arrivals nearing the peak years of 1994 through 1996. In 2005, Maui welcomed 2,263,676 visitors, as compared to peak visitor arrivals of 2,288,809 visitors in 1994. As of 2005, Moloka'i and Lāna'i welcomed 74,683 and 75,822 visitors respectively. Both islands had the highest visitor counts in the 1990s: Moloka'i had 115,684 arrivals in 1992 and Lāna'i had 106,836 arrivals in 1997.

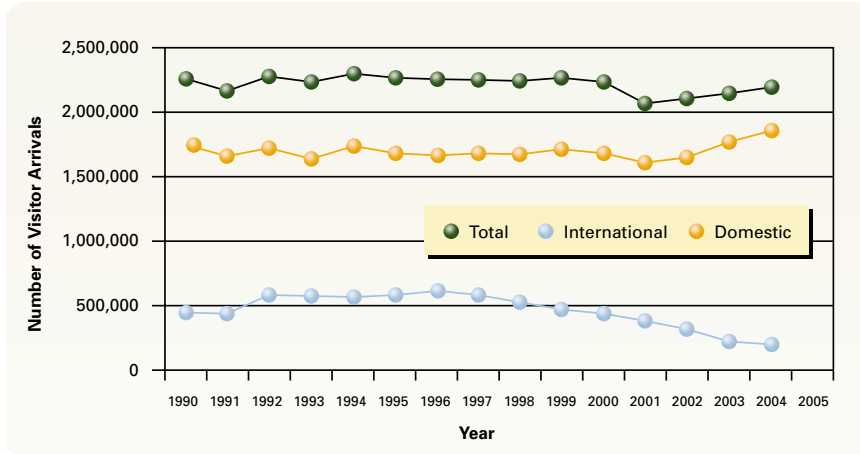
Chart 1: Historical Visitor Arrivals⁶



⁶ DBEDT Monthly Visitor Statistics 2005, December

A major difference for Maui Island since the mid-1990s, is that the number of international visitors, and in particular, Japanese visitors, has declined as the number of domestic visitors has increased, as shown in Chart 2. From 1990 to 2005, international arrivals have dropped 43% on Maui Island. In 2005 international visitors comprised 11% of Maui Island’s total visitors.⁷

Chart 2: Island of Maui Historical Visitor Arrivals by Type of Visitor⁸



International visitors made up 23% of total visitors on Moloka’i, and 15% on Lāna’i.⁹ The majority of these international visitors were from Canada and Europe.

Visitors to Maui Island spent a total of \$3 billion in December 2005, with per-person, per-day (PPPD) spending of \$184, which is the second highest PPPD statewide. Lāna’i had a total visitor spending of \$53 million, with the highest PPPD spending in the state at \$229. Moloka’i, with a total of \$30 million in total visitor spending and an average of \$91 PPPD, was the lowest in the state.¹⁰

The economy of Maui County has the greatest reliance in the state on the visitor industry, with 39% of its Gross County Product (GCP) attributed to the visitor industry.¹¹ In comparison, the range across the other counties is from 19% to 29%. Likewise, 31,900 jobs, or 45% of all Maui County jobs, are visitor related in the categories of Accommodations, Food Service, Arts and Entertainment, and Retail Trade.¹² As these numbers reflect, the visitor industry contributes significantly to the Maui County economy in revenues, as well as employment. In addition to these direct impacts, visitor expenditures have a multiplier effect throughout the Maui County economy contributing to transportation, real estate, construction, county government and other agencies.

⁷ DBEDT December 2005 Island Highlights

⁸ DBEDT Monthly Visitor Statistics, December

⁹ DBEDT Island Highlights December 2005

¹⁰ DBEDT Island Highlights December 2005

¹¹ DBEDT Long Term Forecast 2005

¹² State of Hawai’i Department of Labor and Industrial Relations

Table 1: Visitor Air Arrivals, PPPD, and Expenditures by Island in Maui County¹³

	April 2005	April 2006	Percent Change
Maui Island Visitor Arrivals	728,752	772,216	+6%
Maui Island PPPD	\$165	\$191	+16%
Maui Expenditures (in millions)	\$936	\$1,172	+25%
Moloka'i Visitor Arrivals	25,684	25,999	+1%
Moloka'i PPPD	\$83	\$94	+13%
Moloka'i Expenditures (in millions)	\$10.3	\$10.5	+2%
Lāna'i Visitor Arrivals	24,681	27,596	+12%
Lāna'i PPPD	\$220	\$268	+22%
Lāna'i Expenditures (in millions)	\$17	\$24	+40%

From 2000 to 2005, the resident population in Maui County increased by 9% from 128,094 to 139,884.¹⁴ DBEDT projects that the resident population of Maui County is expected to grow faster than the state overall, averaging an annual growth rate of 1.4% for the next thirty years, compared with a statewide growth rate of 1.0%¹⁵. Given growth in the industry and increases in the resident population, retaining the islands' natural beauty and adequate infrastructure becomes increasingly challenging.

Visitor Accommodations in Maui County

The number and types of accommodations on each island in Maui County vary significantly, and reflect the different types of market segments that visit the three islands, as well as the types of experiences available on each island.

Maui Island has the greatest number and variety of accommodations totaling 18,469 units,¹⁶ with the vast majority of units being hotel and condo/hotel.

MAUI ISLAND

Hotel (7,974 units):	43.2%
Condo/Hotel (7,509 units):	40.7%
Timeshare (1,852 units):	10.0%
Individual Vacation Unit (570 units):	3.1%
Bed & Breakfast (116 units):	0.6%
Other (448 units):	2.2%

¹³ DBEDT Monthly Visitor Statistics April 2005 & 2006

¹⁴ DBEDT Economic Census 2005

¹⁵ DBEDT 2030 Report

¹⁶ DBEDT Visitor Plant Inventory 2005

Tourism on Maui Island has deliberately evolved around the well-defined resort areas of Lāhainā and Waile‘a. As a result, visitor accommodations on Maui Island are very concentrated, with about 94% of all visitor units located in the Lāhainā - Kā‘anapali and Kīhei/Waile‘a areas.¹⁷ More than half of all visitor units, 55%, are deluxe and luxury type and are located in the Kā‘anapali and Waile‘a areas.¹⁸

<u>MAUI ISLAND</u>	<u>% OF VISITOR UNITS</u>
• Lāhainā - Kā‘anapali:	53%
• Kīhei - Waile‘a:	41%
• Kahului - Wailuku:	3%
• Mā‘alaea:	2%
• Hāna:	1%

With only 261 square miles and a population of approximately 7,500 residents, Moloka‘i has significantly fewer visitor units than Maui Island. There are 452 visitor accommodation units on Moloka‘i, with the majority being condo/hotels.¹⁹ Unlike Maui Island or Lāna‘i, 84% of visitor units on Moloka‘i are in the budget and standard category.

<u>MOLOKA‘I</u>	<u>% OF VISITOR UNITS</u>
• Condo/Hotel (259 units):	57.3%
• Hotel (141 units):	31.2%
• Individual Vacation Unit (30 units):	6.6%
• Timeshare (15 units):	3.3%
• Bed & Breakfast (3 units):	0.7%
• Other (4 units):	0.9%

The sixth smallest inhabited island in the state, with 140 square miles, Lāna‘i has the fewest number of units (369), with the vast majority comprised of hotel units.²⁰ Of these units, 95% are in the luxury and deluxe category, making Lāna‘i an island primarily for upscale visitors.

<u>LANA‘I</u>	<u>% OF VISITOR UNITS</u>
• Hotel (362 units):	98.1%
• Individual Vacation Unit (3 units):	0.8%
• Bed & Breakfast (3 units):	0.8%
• Apartment/Hotel (1 units):	0.3%

The average daily room rate for Maui County for the first four months of 2006 was \$244, an increase of 16% from the same period in 2005.²¹ Hotel occupancy rates for the county averaged 80% in 2005.²² Hoteliers interviewed suggested that this is considered maximum efficiency capacity level. Only November and December in 2005 experienced occupancy rates below 75%.

¹⁷ DBEDT Visitor Plant Inventory 2005

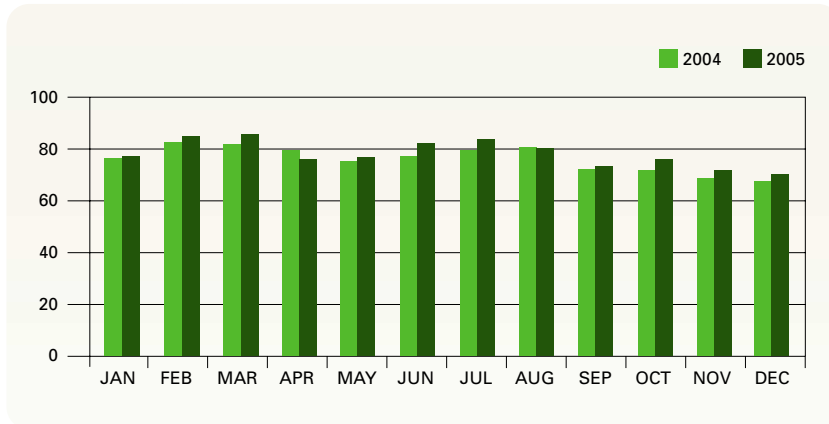
¹⁸ DBEDT Visitor Plant Inventory 2005

¹⁹ DBEDT Visitor Plant Inventory 2005

²⁰ DBEDT Visitor Plant Inventory 2005

²¹ DBEDT Monthly Visitor Statistics 2005, December

²² Smith Travel/Hospitality Advisors 2005

Chart 3: Hotel Occupancy for Maui County²³

Accommodations in Maui County are near capacity with relatively little growth in new properties anticipated within the foreseeable future.

Workforce Availability for Maui County

The strong economy of Maui County has resulted in the number of jobs increasing faster than the number of skilled workers available for those jobs. The overall unemployment rate has dropped from over 4% to about 2.6%, from 2001 to 2005.²⁴ With this lower unemployment rate, hotels and other businesses have found it increasingly difficult to attract the numbers and quality of staff required.

As noted earlier, 31,900 jobs in Maui County were identified in visitor related categories (Accommodations, Food Service, Arts and Entertainment, and Retail Trade) in 2005, approximately 45% of all wage and salary jobs on the islands.²⁵

Overall, visitor industry workforce availability in Maui County has been impacted by a number of factors including demographic changes, the island's high cost of living, and competition from other, more desirable and higher paying industries. In fact, the median price of a single-family dwelling in January 2006 on the island of Maui was \$690,500.²⁶ This median price is the highest in the state with an increase of 9% from January 2005.

Similar to the rest of the state, the population in Maui County is aging, with the baby boomers moving beyond the prime workforce years and fewer residents in the younger age groups. As the industry grows, a demand for more skilled and trained workers that can provide exceptional service to visitors will be needed.

²³ Smith Travel/Hospitality Advisors 2005

²⁴ First Hawaiian Bank Economic Forecast – Maui Edition 2005-2006

²⁵ State of Hawai'i Department of Labor and Industrial Relations

²⁶ DBEDT Monthly Economic Indicators 2005 & 2006

An additional challenge for Maui County is that the majority of the workforce does not typically live in close proximity to the places of employment. This results in long commute times, or shuttling between the islands for the workforce within the visitor industry. While some workers do take the ferry between Kaunakakai and Lāhainā regularly, there currently are no plans to expand this transportation option.

Reported wages for visitor industry related jobs are about 25% below the wages of jobs outside the visitor industry. When residents were asked about working in the visitor industry, 37% of Maui Island residents who were surveyed responded that they strongly agreed that “Tourism jobs do not have much opportunity.” Moloka‘i and Lāna‘i residents, 44% and 34%, respectively, strongly agreed.²⁷

Given the extremely tight labor market, lower wages, geographic issues, and perceived lack of opportunity, the visitor industry within Maui County will be impacted by a shortage of quality staff. This will be particularly important for Maui and Lāna‘i, given the service requirements for their deluxe and luxury level accommodations. With higher prices come higher expectations, and the need for a trained staff to deliver the level of service that is expected.

2. Critical Issues for Maui Island

Maui is the second-largest visitor destination in Hawai‘i. Maui offers visitors a variety of experiences with a range of accommodations, natural beauty, a national park, a national marine sanctuary, and community-based activities, that include Lāhainā whaling town and up-country Paniolo rodeos. This range of offerings has attracted a large number of visitors, and in fact, established a strong “Maui brand.” For twelve years in a row, the readers of Condé Nast Traveler and Travel and Leisure magazines voted Maui the “Best Island in the World.”²⁸ With this distinction, important issues must be addressed for Maui to retain its reputation, and to provide and maintain a product and service to meet visitor expectations.

Resident Concerns

Maui Island residents have mixed feelings about the visitor industry. In 2005, only 42% of residents strongly agreed that “Tourism has brought more benefits than problems to this island.”²⁹ This is a decrease of 7 percentage points from 2002, indicating that residents are feeling less supportive about tourism. Additionally, 52% of residents feel that “Tourism has been mostly good for self and family,” down 4 percentage points from 2002.

²⁷ 2002 & 2005 Survey of Resident Sentiments on Tourism in Hawai‘i, Market Trends Pacific and John Knox and Associates, December 2005

²⁸ Frommers.com 2005

²⁹ 2002 & 2005 Survey of Resident Sentiments on Tourism in Hawai‘i, Market Trends Pacific and John Knox and Associates, December 2005

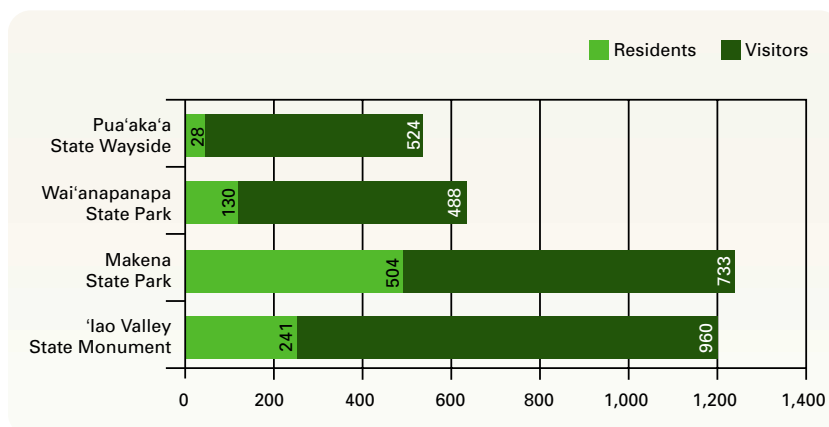
Maui residents do not want more visitor-oriented developments. As of 2005, 80% of Maui Island residents strongly or somewhat agreed that “Even if more visitors come, we don’t want to see any more hotels on this island.” Residents are strongly against visitor-related growth in any other areas of the island. As current visitor properties are reaching maximum capacity levels, more visitors appear to be seeking alternate experiences such as Bed & Breakfasts (B&Bs) and Individual Vacation Units (IVUs). These types of units are appearing in traditionally residential, non-visitor designated areas. Residents are concerned that this encroachment will change the nature and friendliness of their communities.

There was over one visitor for every two-and-a-half residents per day in 2005 on Maui Island.³⁰ Based on feedback from community meetings, residents are feeling the strains of this higher visitor count; moreover, many of the island’s problems, such as overcrowded roads, lack of affordable housing, and reduction in the quality of life, are being attributed to visitors and the visitor industry. Among Maui residents who were surveyed, 69% responded that they felt traffic was a big problem.³¹ The volume of traffic is particularly high on the single road between central and west Maui. With an accident or blockage on the road, it is particularly difficult for residents to travel between these two areas.

Natural Resources

Maui residents are concerned with the health of their island’s natural resources. Based on community meetings, concerns include unauthorized Internet websites and guidebooks directing visitors to dangerous areas and/or private properties, insufficient infrastructure for beaches and parks, including inadequate signage, restrooms and maintenance; and managing the health of these natural resources. An example of the impact of visitors is the number of people visiting state parks. As shown in Chart 4, daily visitor counts are significantly greater than the number of residents at these parks.

Chart 4: Daily Average Maui Park Usage³²



³⁰ SMS forecast

³¹ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

³² HTA Hawai'i State Park Survey 2004

Other concerns voiced include the arrival of passengers from cruise ships creating congestion near Kahului and Lāhainā Harbor. This larger number of visitors makes the overall experience less rewarding for the visitors, as well as residents. Currently, there is discussion underway on how to better manage the flow of visitors throughout the island. Another example of crowding and its impact is the traffic on the road to Hāna. Traffic congestion has negative consequences for residents who must make the long trip for personal and business reasons, and for visitors who are choosing to travel to and from Hāna because of the visitor experience it offers.

Additional issues that were raised at community meetings were concerns about the protection of coastlines and wildlife. For instance, during the whale-watching season there are reports of too many boats crowding the whales and not following regulations. This is not only dangerous for the whales, but can be dangerous for boat passengers. Other concerns on Maui Island include the quality of the ocean water and reefs given the increase in cruise ships, as well as commercial activities such as whale-watching, snorkeling tours, sunset cruises, etc. Enforcement of regulations to ensure that the surrounding waters and sea life retain their health was strongly encouraged.

Hawaiian Culture

The Hawaiian culture, its people, and their history need to be protected and perpetuated to enhance the quality of life for residents and for the visitor experience. Hawaiian culture and natural resources are intertwined, and need to be preserved to maintain the uniqueness and health of the islands. Experiencing the Hawaiian culture is what makes Hawai'i distinct in comparison to other visitor destinations.

Maui Island residents are concerned that the natural beauty of the island and historical sites be preserved and protected. Some visitors are not aware of proper protocol for historical sites, nor are they properly advised about Hawaiian history and use of language. Better education of visitors and residents is necessary to ensure the Hawaiian culture is preserved and protected. Of Maui Island residents, 44% surveyed thought "Tourism has worsened the preservation of native Hawaiian culture." This is in comparison to 35% surveyed who felt "Tourism had made it better."³³

Visitor Satisfaction

Currently, visitor satisfaction on Maui Island is high. Based on the 2005 DBEDT Visitor Satisfaction and Activity report, U.S. East visitors gave Maui Island the highest overall island experience rating of excellent at 74% of those responding.³⁴ Other visitor segments who rated Maui from second highest to lowest are: U.S. West, Europe, Canada and then Japan (73%, 68.2%, 68%, 58%). U.S. East, Canada and Japan visitors rated Maui Island with the highest percentage of excellent rating, compared to all other islands statewide. In order to maintain these high ratings, the visitor industry must continue to deliver high levels of service and a quality tourism product.

³³ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

³⁴ DBEDT Visitor Satisfaction and Activity Report 2005

Cruise Industry Growth on Maui Island

Over 300,000 cruise ship visitors arrived on Maui Island in 2005, averaging 5,800 visitors per week. This was a total increase of over 75,000 cruise ship visitors compared with the previous year. The increase was largely due to the addition of Norwegian Cruise Line's (NCLs) *Pride of Aloha*, which began Hawai'i operations in July 2004.³⁵

In May 2006, NCL welcomed its third ship, *Pride of Hawai'i*, which is expected to bring an additional 50,000 new cruise passengers to Maui Island each year. Based on NCL plans for the future, that have already received state approval, the total number of cruise passengers to Maui will reach 350,000 annually starting in 2007.³⁶

When cruise ships dock, approximately 1,500 visitors arrive and depart at one time, resulting in significant surges that impact transportation resources, traffic, visitor attractions, parks, and recreational facilities. Ships dock at both Kahului Harbor, as well as offshore from Lāhainā, impacting water activities, as well as nearby communities. The impacts of the cruise industry on Maui Island residents and business communities need to be further addressed to ensure a sustainable cruise industry on island, and to minimize any negative impacts to residents.

3. Critical Issues for the Island of Moloka'i

Moloka'i is a rural island, where the economy is primarily dependent on agriculture and tourism. In 2005, Moloka'i had approximately 74,683 visitors, averaging 840 visitors per day.³⁷ With a resident population of about 7,500 people, Moloka'i had, on average, slightly more than one visitor for every ten residents per day.³⁸

Moloka'i primarily offers budget and standard levels of accommodations and relatively few visitor attractions. Hotel occupancy for Moloka'i is the highest in the winter and summer seasons, with a peak month in January.³⁹ Moloka'i provides unique and cultural experiences, and is attractive to visitors looking for a true outdoor Hawai'i experience. The small community nature of Moloka'i provides an opportunity for residents to take an active role in planning for tourism on-island.

³⁵ DBEDT Visitor Statistics 2005

³⁶ Mayor's Monthly Cruise Ship Task Force Island of Maui, Final Report, August 15, 2005

³⁷ DBEDT Island Highlights December 2005

³⁸ DBEDT Economic Data 2005

³⁹ Smith Travel Research/Hospitality Advisors LLC 2005

Resident Concerns

Resident sentiment toward the visitor industry on Moloka'i is mixed, with unfavorable ratings increasing. In 2005, 41% of Moloka'i residents felt that "Tourism affected the quality of life in the county in a better way," down from 55% in 2002. Likewise, 45% of residents felt that "Tourism is mostly good for self and family," down from 51% as of 2002. Additionally, 37% of residents strongly agreed "Tourism has brought more benefits than problems to this island." This is down from 43% in 2002. Island residents do not want more hotels built, with 73% strongly or somewhat agreeing, stating "Even if more visitors come, I don't want to see more hotels on this island."⁴⁰

In the community meeting held on the island, residents also expressed the need for increased number of flights and lower fares, an on-island public transportation system, and a strong desire for a community-based tourism representative for marketing efforts.

Hawaiian Culture and Natural Resources

Hawaiian culture is steeped in the natural resources of the island. As with Maui Island, the primary goal is to preserve and cherish its resources for residents and visitors. Many of the festivals held on-island combine the respect for nature and Hawaiian culture. The community has voiced that they would like funding to complete and maintain Malama Park and Pālā'au State Park, for the enjoyment and education of residents and visitors. An example of concerns for preservation is the sacred site or *heiau* (temple) at Mapulehu, which is the oldest and largest temple on the island. It is situated on private property, though advertised as accessible on the Web and in tourist information booklets. This results in both uninformed visits and trespassing.

Visitor Satisfaction

In 2005, Moloka'i visitors had the lowest visitor satisfaction ratings in the state. Visitors from the U.S. rated their overall experience on the island as "excellent" at 66%.⁴¹

In feedback offered at Maui County TSP community meetings, there were several ideas identified for improving the visitor experience on Moloka'i. For example, creating appropriate expectations of the Moloka'i experience by better communicating to visitors the distinctive experience Moloka'i offers. Other suggestions included providing agricultural inspection at Moloka'i airport, so visitors do not have to check in bags a second time in Honolulu; increasing the number of flights to Moloka'i; and providing more community-driven activities for visitors.

⁴⁰ 2002 & 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁴¹ DBEDT Visitor Satisfaction and Activity Report 2005

Planning for the Future

Community residents described Moloka'i as offering a unique, outdoor, natural experience with a strong emphasis on Hawaiian culture. There were suggestions that the island should be marketed only to visitors seeking those types of experiences. The group also had a strong belief that the marketing strategies for the island should originate on Moloka'i, with dedicated staff on-island, and that Moloka'i be promoted uniquely from the other islands in Maui County.

In February 2006, the Moloka'i Responsible Tourism Initiative was published. This document is a community-based visitor plan for Moloka'i, and reflects much of what was discussed during the community meeting conducted for this Maui County TSP.

4. Critical Issues for the Island of Lāna'i

Castle & Cooke owns about 98% of Lāna'i Island, including both major resorts on the island: Mānele Bay and The Kō'ele Lodge. The pineapple industry on Lāna'i was phased out in the early 1990s, and was replaced by resort and real estate development that drives the economy of Lāna'i today.⁴²

Lāna'i had approximately 75,821 visitors, with approximately 660 visitors per day in 2005.⁴³ With a resident population of only 3,190, Lāna'i averages about one visitor to every five residents each day.⁴⁴

Visitors to Lāna'i are upscale travelers seeking a secluded resort experience. This is a reflection of the type of accommodations and activities available through the two hotels. Visitors to Lāna'i spend more on this island than any other with PPPD spending of \$229.⁴⁵ High hotel occupancy occurs during the months of March, June, and December.

Resident Concerns

Resident sentiment toward the visitor industry on Lāna'i has declined significantly between 2002 and 2005.⁴⁶ As of 2005, only 39% of Lāna'i residents strongly agreed "Tourism has brought more benefits than problems to this island," down 13 percentage points from 2002. In addition, 55% of residents felt that "Tourism has been mostly good for self and family," down 17 percentage points from 2002. Over that same period, an increase of 11 percentage points of residents reported they do not want additional hotels built on the island. Seventy five percent of residents somewhat and strongly agreed "Even if more visitors come, I don't want to see any more hotels on this island."

The community meeting held on Lāna'i reaffirmed many of the feelings expressed in the survey. Residents feel more attention should be placed on preserving natural and cultural resources, in addition to improving the basic infrastructure of the community, rather than growing the number of visitors.

⁴² Aloha-Hawaii.com

⁴³ DBEDT Monthly Visitor Statistics 2005

⁴⁴ DBEDT Economic Data 2005

⁴⁵ DBEDT Monthly Visitor Statistics 2005, December

⁴⁶ 2002 & 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December

Lānaʻi is a small island; however, even in this small community, residents felt that communication between residents and the visitor industry was insufficient. Additional resident concerns included the need for public transportation within Lānaʻi City, parking issues at the harbor, emergency health care, and disaster planning.

Hawaiian Culture and Natural Resources

There was a strong concern expressed at the community meeting that the younger generation on Lānaʻi, and visitors, should be educated about the history of the island, its heritage and culture. Each of the ethnic populations on-island should be celebrated, and the Hawaiian culture should be respected. Residents would like to rebuild the cultural center and museum, to include a visitor center for residents and visitors to gather.

Similar to Maui and Molokaʻi, preservation of the Hawaiian culture is vital. An example of the impact of visitors on sacred sites is Keahiakawelo. Visitors who are not aware of the proper Hawaiian cultural protocols pile up stones, and ultimately impact the cultural site, and its natural surroundings. The visitor experience can be enhanced with education in proper etiquette and the history of sacred sites. There is presently a study underway, being conducted on behalf of the Lānaʻi Archaeological Committee (a partnership between community organizations, Castle & Cooke, and state agencies) to identify and document historical sites on the island that hopefully will be shared with visitors and residents.

Visitor Satisfaction

In 2005, continental U.S. visitors rated Lānaʻi the highest compared to other visitor markets, with their overall island experience as “excellent” at 43%.⁴⁷ However, from the 2004 visitor satisfaction survey, the excellence rating has dropped significantly from 61%.⁴⁸ Suggestions from community meetings on how to increase visitor satisfaction included sharing more information of activities on-island with visitors, and enhancing the cultural center to better share the history of the island. Residents would like visitors to experience the true Hawaiian culture, as well as learn about the multi-cultural history of the island.

Planning for the Future

Lānaʻi is a one-company town. The major responsibility for attracting future visitors will continue to rest with Castle & Cooke.

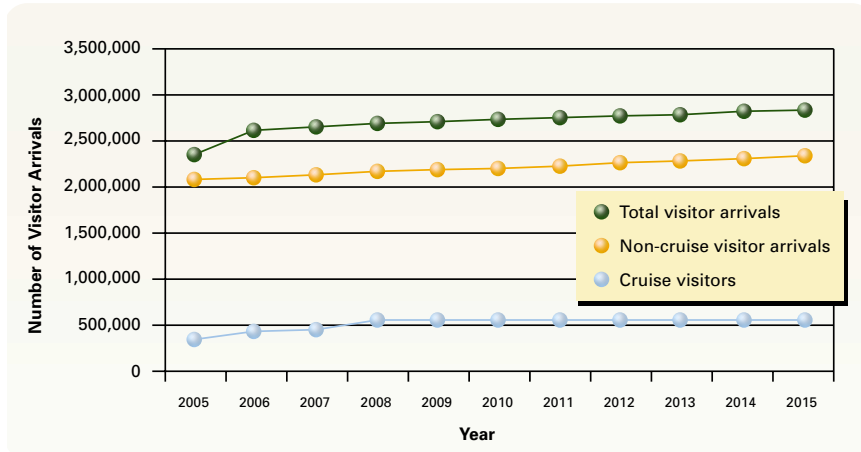
⁴⁷ DBEDT Satisfaction and Activity Report 2005

⁴⁸ DBEDT Satisfaction and Activity Report 2004

5. Forecast

The forecast for future visitor arrivals for Maui County is a relatively small increase, except for the planned increase in cruise ship visitors. This is primarily due to current visitor accommodations running near capacity, and no large resorts or hotels with zoning and permitting approval.

Chart 5: Maui County Visitor Arrivals Forecast:⁴⁹



⁴⁹ SMS forecast

IV. Maui County Tourism Strategic Plan

A. Plan Assumptions

The following are underlying factors in the planning process that were agreed to in discussions of the Maui County Tourism Strategic Plan Advisory Committee discussions, and are shared for the purpose of providing greater insight into the considerations essential to this plan:

- The quality of life for Maui, Molokaʻi and Lānaʻi residents is important for all stakeholders, including the visitor industry. The visitor industry, together with other stakeholders, is committed to improving the quality of life for all residents. This plan recognizes that there is an interrelationship between satisfied residents and satisfied visitors. If our residents are happy, then our visitors will be happy.
- The County of Maui includes the islands of Maui, Molokaʻi, Lānaʻi and Kahoʻolawe islands. For this plan only Maui, Molokaʻi and Lānaʻi have been included because access to Kahoʻolawe is extremely limited and unlikely to change in the timeframe of this plan.
- The County of Maui is comprised of three very different islands. Maui Island represents a significantly larger share of visitors. However, the industry is also important to both Molokaʻi and Lānaʻi. Given that the primary target market for each island is significantly different, the three islands are addressed separately in different parts of the plan.
- The Hawaiian culture is what makes Maui, Lānaʻi and Molokaʻi unique for both residents and visitors. This unique indigenous culture must be retained and perpetuated for future generations.
- The visitor industry is important to each of the islands in Maui County and needs to be supported on a continuing basis.
- To achieve success, top executives from all stakeholder groups need to endorse the plan to help motivate the visitor industry in obtaining its goals.
- The islands of Maui, Lānaʻi and Molokaʻi offer unique experiences. Marketing should target visitors who are seeking the unique experiences that each of these islands offers.
- The competition worldwide for visitors is increasing dramatically. Therefore, Maui, Lānaʻi and Molokaʻi must continually provide a product that is unique relative to the global competition. To be differentiated from the competition, the islands need to strive for a level of quality that is appropriate for their target markets.
- The visitor industry, like all industries, is cyclical; therefore this plan must be flexible enough to adjust to cycles and unexpected occurrences. Flexibility may involve re-adjusting the target market to gain more visitors, or reacting quickly to recoup from a natural disaster.

B. Plan Structure

Vision

The tourism vision for Maui County describes the ideal way tourism should interact with its stakeholders. This vision is what this Maui County TSP is striving to achieve. The vision included in the Maui County TSP is consistent with the vision in the State TSP, with the addition of a quality of life statement for residents.

Goals

Goals are incremental steps to the vision being achieved. For the Maui County TSP, a 2015 goal was developed. The 2015 goal reflects how tourism and its stakeholders will relate to each other for the vision to be achieved.

Objectives

There are seven objectives in this plan. The objectives are designed to move Maui County 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 are listed because they have the potential for implementation over a three-year time horizon. They will move county tourism stakeholders closer to achieving the objective, and they either build on relevant work already being done, or outline new work that needs to be undertaken.

As would be expected in a complex and integrated plan, many strategies address more than one objective. When a strategy addresses more than one objective, 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.

The unique nature of the islands of Maui County suggests that strategies may not apply to all islands; therefore, each strategy is labeled by the island(s) for which it is designated.

During the planning process, a number of strategies were identified that were not deemed to be as urgent and/or able to be accomplished over the next three years. These strategies are included in Appendix D for future consideration.

To demonstrate alignment between this plan and the State TSP, each strategy in Section E is identified with one or more of the nine strategic initiatives in the State Plan in Appendix E.

Action Plans

Strategies are supported with draft action plans that list recommended action steps. Action plans are separate working documents that are expected to be adjusted regularly by individuals and/or planning oversight committees as necessary. Action plans identify recommended champions and supporting organizations to implement strategies and specific actions. More information on oversight functions is described later under Objective 7 of this document. Action plans can be obtained by contacting the County of Maui, Office of Economic Development.

Measurements

A performance scorecard, with high level current measures and directional targets for 2009, is 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 and make appropriate changes where necessary.

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 the scorecards.

C. Maui County Tourism Vision

Tourism on Maui, Moloka'i and Lāna'i will:

- Honor the people and heritage of each island;
- Support and enhance the quality of life for residents;
- Value and perpetuate the natural and cultural resources of the islands;
- Engender mutual respect and partnership among all stakeholders;
- Support a vital and sustainable economy; and
- Provide a unique sense of place that will be memorable and enriching for visitors.

D. Maui County Tourism Goal

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

The tourism goal for Maui, Moloka'i and Lāna'i is:

To strategically manage tourism on Maui, Moloka'i and Lāna'i, in a sustainable manner that promotes economic well-being, quality of life for residents, preservation of natural and cultural resources, and quality experiences for visitors.

E. Maui County Tourism Objectives, Strategies, and Measures

Objective 1: To increase the economic contribution of the visitor industry to Maui County.

Rationale: Tourism makes a significant contribution to Maui's economy, representing approximately 39% of the Gross County Product (GCP) and employing a significant workforce.⁵⁰ To maintain the health of this industry, this plan focuses on increasing the economic contribution from the visitor industry by increasing per-person, per-day visitor spending. To accomplish this, there must be on-target marketing with the right messaging to attract visitors who can and will boost the economy by actively experiencing what Maui, Moloka'i and Lāna'i have to offer. Critical to this objective is ensuring there are diverse events and activities throughout the year for visitors to enjoy, a skilled and trained workforce able to meet service expectations and proper airport and harbor infrastructure to meet arrival and departure needs.

Strategies to Achieve Objective 1 for 2006 to 2009:

- a. Develop and implement an annual tourism marketing plan to achieve visitor arrival and visitor expenditure targets:
 - i. Maui: Golf, Romance (Bridal and Honeymooners), Avid Travelers, Convention Meetings and Incentive travel (CMI), West Coast, East Coast, Canada, and Australia
 - ii. Moloka'i: Conscientious Adventurer, Agri-Tourist, Traveler looking for a true Hawaiian outdoor experience
 - iii. Lāna'i: Upscale, Romance, Golf, Soft Adventurer
- b. Develop programs to attract employees to the visitor industry and increase the available workforce. (Maui, Moloka'i and Lāna'i)
- c. Ensure maintenance of ongoing events year-round, with consideration for events that will support the visitor industry during slower periods. (Maui, Moloka'i and Lāna'i)
- d. Advocate for improvements to airports and harbors to enhance infrastructure, signage, and Hawai'i ambiance. (Maui, Moloka'i and Lāna'i)
 - i. Kahului Airport has been allocated an estimated \$132 million in the State Airports Modernization Program.
 - ii. Airports on Moloka'i and Lāna'i will share the \$61 million designated for "other airports."
 - iii. Harbor plans need to be shared with the community.
 - iv. Consider ways the cruise industry can contribute to funding for harbor improvements, such as a passenger fee.

⁵⁰ DBEDT Long-Term Forecast 2005

Objective 1 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
1.1	Total air arrivals for Maui Island: ⁵¹	2,263,676	2005	Modest Increase
	Total air arrivals for Lānaʻi:	75,822		
	Total air arrivals for Molokaʻi	74,683		
	Total cruise arrivals for Maui Island: ⁵²	309,565	2005	Modest Increase
	Total cruise arrivals for Lānaʻi	None		
	Total cruise arrivals for Molokaʻi	None		
	Total expenditures for Maui County (in mil): ⁵³	\$3,180	2005	Modest Increase
	Total expenditures for Maui Island (in mil):	\$3,097		
	Total expenditures for Molokaʻi (in mil):	\$30.2		
	Total expenditures for Lānaʻi (in mil):	\$53.3		
	Per Person Per Day Spending: ⁵⁴		2005	Increase*
	• Maui:	\$184		
	• Molokaʻi:	\$91		
• Lānaʻi:	\$229			

*Inflation Adjusted

⁵¹ DBEDT Monthly Visitor Statistics 2005, December

⁵² DBEDT Monthly Visitor Statistics 2005, December

⁵³ DBEDT Monthly Visitor Statistics 2005, December

⁵⁴ DBEDT Monthly Visitor Statistics 2005, December

Objective 2: To make positive contributions to the quality of life for residents, such as:

- Livable wages and benefits within visitor industry workforce
- Increased business opportunities
- Affordable workforce housing
- Supporting communities to retain their sense of place

Rationale: Each of the islands in Maui County is a special place to live and visit, and it is critical to retain the balance of “healthy land, healthy people” to retain the attractive elements of these islands. When residents are happy and healthy, visitors will have a much more positive experience and higher satisfaction.

Resident sentiment toward the visitor industry has been declining on all three islands, and there is a perception that decisions are being made to benefit tourists at the expense of residents.

- In the tight labor market, residents do not perceive visitor industry jobs to be as attractive due to a sense of lower wages, benefits, and limited opportunities for career growth.
- “Buying local” products and purchasing goods from local businesses is one way the industry can support island communities. In doing so, communities retain their traditional character and develop their economic potential.

Maui, Moloka‘i and Lāna‘i need to complete an integrated disaster response plan for both residents and visitors. Hurricane ‘Iniki in 1992 was an example of an emergency situation and since that time, both the resident and visitor populations have increased significantly.

Overall, residents on all islands in Maui County need more affordable housing options, improved roads, increased commuting options, and communities free of substance abuse. All these factors impact resident quality of life, as well as the ability to attract additional workforce to the islands.

An additional factor affecting Maui County communities, particularly the island of Maui, is the spread of B&Bs and Individual Vacation Units (IVUs) into residential communities.

The following strategies address these issues.

Strategies to Achieve Objective 2 for 2006 to 2009:

- a. Develop and sustain education about career opportunities within the visitor industry, from middle school through college. (Moloka‘i and Lāna‘i through high school, Maui through Maui Community College).
- b. Encourage visitors and the visitor industry, including hotels and cruise ships, to “buy local produce and products.” (Maui and Moloka‘i)

- c. Develop and communicate an integrated disaster response plan for preparedness to the state, county, and visitor industry. (Maui, Moloka'i and Lāna'i)
- d. Encourage efforts to support affordable workforce housing and rentals for Maui residents to maintain and attract workforce for the visitor industry. Create incentives for landowners, employers, and developers to contribute to affordable housing, particularly near places of employment. (Maui)
- e. Identify and implement traffic management systems to minimize congestion during rush hour. (Maui)
- f. Support the control of substance abuse that negatively impacts the workforce and community. (Maui, Moloka'i and Lāna'i)
- g. Enforce regulation, and, as necessary, advocate for additional regulations, related to B&Bs and IVUs to ensure that communities retain their sense of place. (Maui)
- h. Support the development of a carrying capacity plan. (Maui, Moloka'i and Lāna'i)

Objective 2 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
2.1	Residents surveyed who agree: ⁵⁵ <ul style="list-style-type: none"> • Most tourism jobs don't have much opportunity: • Tourism has brought more benefits: • Need more tourism jobs: • Tourism has been mostly good for self and family: ⁵⁶ 	56% 70% 35% 52%	2005	Reverse Negative Trend
2.2	Residents surveyed: how good a job the county visitor industry is doing to help other local businesses profit from tourist dollars: ⁵⁷	48% Good	2005	Reverse Negative Trend
2.3	Workforce – Total Wage & Salary Jobs: ⁵⁸ <ul style="list-style-type: none"> • Accommodations: • Arts, Entertainment & Recreation: • Food Services & Drinking Places: • Retail Trade: • Transportation, Warehousing, Utilities: • Agriculture: 	11,900 2,100 7,950 9,950 3,450 1,450	2005	Track Changes

⁵⁵ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁵⁶ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁵⁷ DBEDT Economic Data 2005

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

Rationale: One of the keys to a successful visitor industry on all islands in Maui County is ensuring there is active communication and understanding between key stakeholder groups. Community meetings and personal interviews highlighted the gap in understanding how similar the issues are among all stakeholders, and how rarely stakeholders come together on an equal basis to better understand each other. Increasing communications between stakeholders will lead to a better understanding of each other, as well as a more cohesive community for Maui County. Likewise, activities that engage residents and visitors will give both groups better opportunities to mutually share experiences.

Strategies to Achieve Objective 3 for 2006 to 2009:

- a. Promote dialogue between the visitor industry and residents about the role of the visitor industry in the life of the county. (Maui, Moloka'i and Lāna'i)
 - i. Work with HTA to build better relationships and understanding between residents and the visitor industry.
 - ii. Build a working relationship with local media.
 - iii. Develop a communications arm to increase communication with local elected officials.
 - iv. Create opportunities to discuss plan measures (Objective 7) as a way to promote discussion between stakeholders.
 - v. Work with educational institutions to ensure good information is available about industry jobs and skill requirements.

- b. Ensure kama'āina are "welcomed" and feel hosted as a visitor by the industry on the islands. (Maui, Moloka'i and Lāna'i)
 - i. Encourage the visitor industry to offer additional kama'āina rates, and promote a listing of businesses that want to be recognized for offering these rates.
 - ii. Promote activities that appeal to both residents and visitors. Use appropriate on-island media to better promote these activities.

Objective 3 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
3.1	Residents surveyed: how good a job the county visitor industry is doing to make local residents feel welcome in hotels and other visitor facilities: ⁵⁸	50% Good	2005	Reverse Negative Trend
3.2	Residents surveyed: how good a job the govt. has done in promoting festivals, arts, and cultural activities to bring visitors and residents together: ⁵⁹	54% Good	2005	Improving Trend
3.3	Residents surveyed: how tourism affects your county on the overall quality of life: ⁶⁰ <ul style="list-style-type: none"> • Maui County: • Maui Island: • Lānaʻi: • Molokaʻi 	47% Better 47% Better 54% Better 40% Better	2005	Reverse Negative Trend

⁵⁸ 2005 Survey of Resident Sentiments on Tourism in Hawaiʻi, Market Trends Pacific and John Knox and Associates, December 2005

⁵⁹ 2005 Survey of Resident Sentiments on Tourism in Hawaiʻi, Market Trends Pacific and John Knox and Associates, December 2005

⁶⁰ 2005 Survey of Resident Sentiments on Tourism in Hawaiʻi, Market Trends Pacific and John Knox and Associates, December 2005

Objective 4: To maintain and improve visitor satisfaction with their experience on Maui, Moloka'i, and Lāna'i.

Rationale: High levels of visitor satisfaction are essential for a thriving visitor industry. Key to ensuring that visitors are highly satisfied is ensuring a good match between their expectations and the attributes of each island. Providing visitors with appropriate knowledge of the islands and culture prior to arrival is critical given the significant differences in experiences that each island offers.

Visitor safety is a top priority for the visitor and the County of Maui, particularly following the fires and flooding the state has experienced. Visitors also need to be better educated on the power of the ocean, and safety procedures in case of an emergency.

As an island state, preserving and maintaining the natural resources on Maui, Moloka'i and Lāna'i are critical for both residents and visitors. Preserving and maintaining these resources will benefit visitors and residents, now and in the future. Increasing the skill levels of workers in the industry will contribute to the continuation of high levels of visitor satisfaction. This can be accomplished through workforce training programs.

Strategies to Achieve Objective 4 from 2006 to 2009:

- a. Advocate and support the development of a process of educating visitors prior to or upon arrival on basic information that will enhance their safety and their understanding and appreciation of natural resources and the Hawaiian culture. (Maui, Moloka'i and Lāna'i)
- b. Implement and encourage workforce-training programs to ensure quality service that exceeds the expectations of visitors. (Maui, Moloka'i and Lāna'i)
- c. Support the County of Maui with emergency preparedness by:
 - i. Developing a process by which visitors can access information (multi-lingual) in case of an emergency, natural disaster, etc. (Maui, Moloka'i and Lāna'i)
 - ii. Ensuring there are adequate emergency facilities to meet the needs of residents and the visitor industry population. (Maui, Moloka'i and Lāna'i)
 - iii. Supporting efforts to increase safety and security for visitors and residents at public places such as beach parks, events, and cultural sites. (Maui, Moloka'i and Lāna'i)
- d. Preserve and maintain a healthy, pristine natural environment for residents and visitors. (Maui, Moloka'i and Lāna'i)

Objective 4 Scorecard

	Measures	Benchmark			Data Year	Directional Change for 2009
4.1	Visitor Activity Participation – Continental U.S.: ⁶¹ • Sightseeing • Recreation • Entertainment • Shopping • Culture • Transportation	Maui	Lānaʻi	Molokaʻi	2005	Moderate increase in the number of activities that visitors participate in
		89%	64%	91%		
		88%	73%	56%		
		78%	31%	51%		
		89%	15%	46%		
		71%	9%	52%		
		84%	14%	38%		
	Visitor Activity Participation – Japanese: • Sightseeing • Recreation • Entertainment • Shopping • Culture • Transportation	Maui	Lānaʻi	Molokaʻi	2005	
		92%	100%	71%		
		54%	84%	71%		
		65%	77%	100%		
		65%	0%	30%		
		27%	0%	0%		
		53%	16%	41%		
4.2	Visitor Satisfaction – Continental U.S.: ⁶² • Excellent • Above Average • Below Average • Poor	Maui	Lānaʻi	Molokaʻi	2005	Maintain
		73%	43%	66%		
		25%	48%	19%		
		2%	15%	15%		
		0.2%	0%	0%		
	Visitor Satisfaction – Japanese: • Excellent • Above Average • Below Average • Poor	Maui	Lānaʻi	Molokaʻi	2005	Increase Percent of Excellent
		58%	34%	57%		
		35%	66%	20%		
		6%	0%	23%		
		1%	0%	0%		

⁶¹ DBEDT Visitor Satisfaction and Activity Report 2005

⁶² DBEDT Visitor Satisfaction and Activity Report 2005

Objective 5: To reinforce authentic Hawaiian culture, ensuring the foundation of our unique sense of place and appropriate recognition of our culture.

Rationale: The Hawaiian culture of each island in Maui County differentiates the on-island experience from all other destinations. In order to keep it a very special place that residents and visitors can cherish, the culture of each island must be recognized and perpetuated.

Practitioners of Hawaiian culture and advisors can be resources for the visitor industry to build authentic experiences that are meaningful for visitors. Cultural practitioners should have more opportunities to pass on their knowledge to future generations of practitioners. Businesses that embrace Hawaiian values will provide a richer experience for both employees and guests.

Strategies to Achieve Objective 5 for 2006 to 2009:

- a. Encourage the development of programs to recognize and share Hawaiian culture and history with residents. Develop a Hawaiian cultural learning program to pass along knowledge to future generations, and encourage younger generations to consider being a cultural practitioner as a way of life. (Maui, Moloka'i and Lāna'i)
- b. Encourage Hawaiian cultural practitioners to work together to develop ongoing "authentic" activities for residents as well as visitors. (Maui, Moloka'i and Lāna'i)
 - i. Connect Hawaiian cultural practitioners with the visitor industry and encourage meaningful inter-connections that benefit both groups.
 - ii. Offer technical training in business skills to support the development of Hawaiian-based businesses.
 - iii. Work with organizations such as NaHHA (Native Hawaiian Hospitality Association) to develop cultural resources that are available to the visitor industry and can support the development of "authentic" Hawaiian experiences.
- c. Increase the likelihood for businesses to assimilate Hawaiian values and culture by developing an orientation process for owners of major Hawai'i visitor industry properties, businesses, and resorts. The objective is to educate these owners, who are the ultimate decision makers, on the importance of Hawaiian culture. A higher level of sensitivity will benefit the state, county, businesses, visitors, and employees. (Maui)
- d. Educate residents, business owners, as well as visitors on "authentic" Hawaiian values, culture, and language usage and pronunciations. Encourage businesses and companies to be respectful of Hawaiian and local culture through music, stories and décor. (Maui, Moloka'i and Lāna'i)

Objective 6: To support the enhancement and maintenance of the natural resources of Maui County.

Rationale: Thriving natural resources are an essential part of quality of life for Maui County residents, and they contribute to a high quality visitor experience. To ensure continued health, it is critical that natural resources be maintained and protected. In particular, beach erosion is a significant problem that must be addressed for the benefit of the whole community.

To ensure that the natural resources of Maui, Moloka'i and Lāna'i are protected, this plan calls for identifying the priority of natural resources that require preservation and protection. Once identified, decisions need to be made about appropriate types of access, necessary infrastructure to ensure safe access, and creative ways to ensure on-going maintenance.

Efforts in recycling, the Anti-litter Campaign, and Environment Crime Stoppers are also being encouraged in Maui County, and the visitor industry encouraged to actively participate in these programs.

Strategies to Achieve Objective 6 for 2006 to 2009:

- a. Provide an inventory of natural resources (including ocean) and identify appropriate levels of usage. (Maui, Moloka'i and Lāna'i)
- b. Ensure education about the importance and fragile nature of cultural and natural resources for our community's children, visitor industry, and visitors. (Maui, Moloka'i and Lāna'i)
- c. Increase visitor industry involvement in the Anti-litter Campaigns throughout Maui County. (Maui, Moloka'i and Lāna'i)
- d. Monitor and enforce regulations of "Environment Crime Stoppers." (Maui, Moloka'i and Lāna'i)
- e. Support the county in its efforts to control land and beach erosion. (Maui, Moloka'i and Lāna'i)

Objective 6 Scorecard

	Measures	Benchmark	Data Year	Directional Change for 2009
6.1	Residents surveyed: how tourism affects your county regarding the preservation of nature and open space: ⁶⁶	57% Poorly	2005	Reverse Negative Trend
6.2	Residents surveyed: how good a job the county visitor industry is doing conserving natural resources: ⁶⁷	24% Good	2005	Reverse Negative Trend
6.3	Residents surveyed: possible community problems in the number and quality of parks: ⁶⁸	24% Good	2005	Reverse Negative Trend

⁶⁶ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁶⁷ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

⁶⁸ 2005 Survey of Resident Sentiments on Tourism in Hawai'i, Market Trends Pacific and John Knox and Associates, December 2005

Objective 7: To establish an oversight mechanism for ensuring implementation and scorecard tracking, including regular reviews and revisions as necessary.

Rationale: To ensure that this plan is implemented, a planning and oversight body will be established. The purpose of this group will be to guide the plan’s implementation, monitor progress, make mid-course adjustments and ensure alignment of this plan with other county, regional or state plans. The County of Maui Office of Economic Development will be responsible for coordinating meetings of an Advisory Committee to oversee plan implementation, track the progress on measures, and call together the appropriate committee to make plan adjustments, as necessary.

The scorecards associated with each objective will help the oversight body assess progress over time and will be revised and expanded upon as needed. No one organization or group has responsibility for the entirety of this plan. Thus, it is necessary to have a diverse oversight body that ensures momentum is maintained and diverse constituents contribute to the success of the plan.

Strategies to Achieve Objective 7 for 2006 to 2009:

- a. Ensure successful implementation and tracking of the Maui County TSP, revising the plan and scorecard measures when necessary. (Maui, Moloka’i and Lāna’i)
- b. Support the efforts on Moloka’i to implement the Moloka’i Responsible Tourism Initiative. (Moloka’i)

Objective 7 Scorecard

	Measures
7.1	Action steps completed as indicated in the plan. (Percent of action steps completed as indicated in the plans.)
7.2	TSP tracked and updated every year. (Annual meeting of Advisory Committee conducted, updated scorecards presented and plans revised as appropriate.)
7.3	Percent of desired scorecard measures with regularly available data provided to track progress.
7.4	Number of directional measures that met targets.

IV. Appendices

A. Acknowledgments

Mahalo to all those involved in developing the Maui County Tourism Strategic Plan 2006 – 2015. Thank you to the community, stakeholders, and the visitor industry for all your valuable insights and dedication to ensuring the plan will be successfully implemented. If we neglected to include your name on this list, we humbly apologize.

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Hawai'i Tourism Authority Board of Directors and Staff

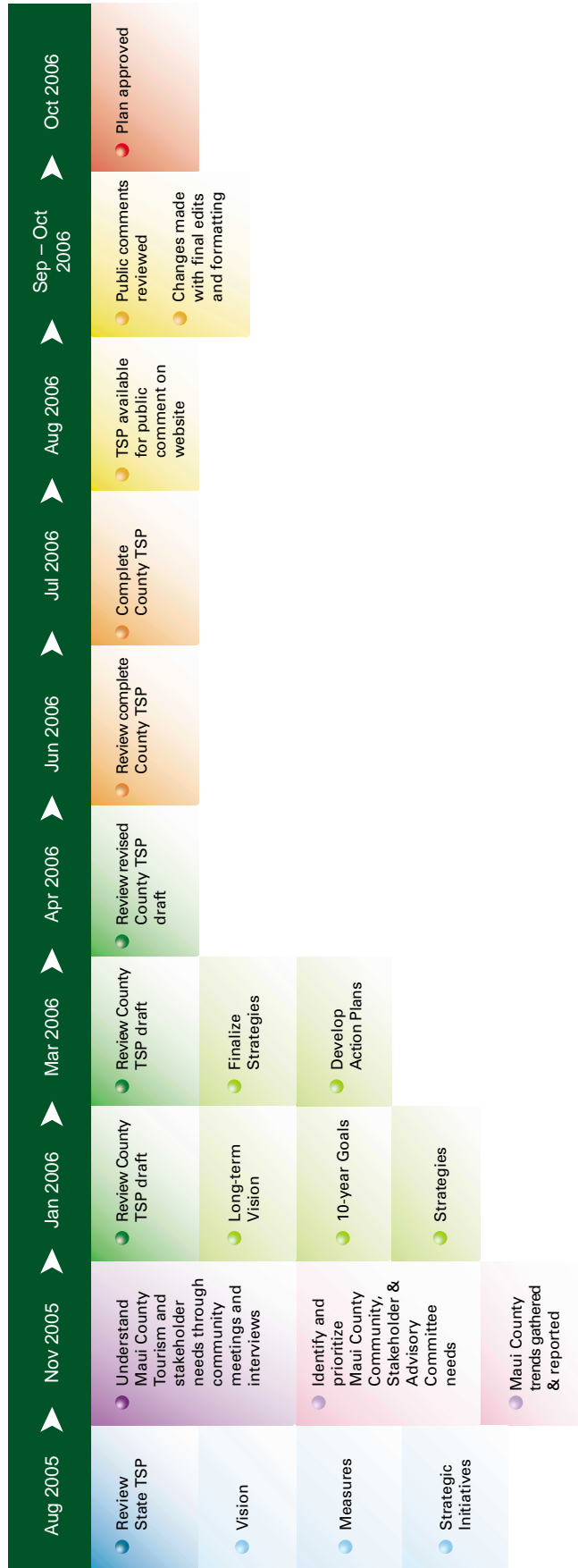
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B: Maui County Tourism Strategic Plan Timeline and Key Events



C: Maui County Community Input

Community, Stakeholder Interviews, Online and Written Comments

Throughout the planning process, input was sought from all visitor industry stakeholder groups. For a balanced plan to be developed, the major needs of each of these groups must be addressed. The following is a summary of the comments submitted by stakeholder groups:

- Government (county, state and federal)
- Residents
- Visitor Industry
- Visitors

The plan was developed to address many of these needs and issues.

1. County, State, and Federal

a. General Needs

- i. Sustain economic growth, recognizing that 39% of the Maui economy is derived from the visitor industry. Continue to look for ways to diversify the economy.
- ii. Maintain or increase resident satisfaction with their quality of life on Maui.
- iii. Understand the carrying capacity of Maui County to provide quality of life for residents and quality of experiences for visitors.
- iv. Planning and ongoing care of natural resources including ocean resources.
- v. Upkeep of sacred and historic sites. Cultural preservation.
- vi. County and state need better coordination and increased cooperation to get plans funded and completed.
- vii. Plans need to be implemented in a timely fashion.
- viii. Enforce existing laws on permits, licenses, and general excise tax payments.

b. Visitor Support Needs

- i. Legislation regarding liability issues of visitors/residents trespassing on public/private lands.
- ii. A method to identify “approved” guidebooks, websites, attractions, tour companies, etc. for their accurate information provided to visitors, including where they should hike, cultural sites, protocol around sites, etc. This “approval” process will separate the legitimate, trustworthy, culturally attuned companies from the “fly-by-night” organizations.
- iii. Appropriate targeting of visitors to Maui – accommodations on island better suited to deluxe and standard, with some luxury and some budget.
- iv. Needs more timely information to better plan for the future of Maui.
- v. Better understanding of the impact of timeshares.
- vi. Certification of tour operators, service providers.
- vii. Higher mandatory sentences for criminals with repeat convictions of car break-ins.
- viii. Method to distribute “what to do in an emergency” information to visitors.
- ix. Develop a permitting process that allows fair access to beaches for weddings, parties, etc. Only allow trustworthy operators to receive permits (those operators that respect residents, leave the area clean, etc.).

c. Infrastructure Needs

- i. Funding to improve roads throughout the island, particularly addressing the congestion and the physical deterioration of the road along Honoapiilani Hwy.
- ii. Provide adequate public transportation for both visitors and residents.
- iii. Consider a rail system from the airport to the west and south side.
- iv. Funding to improve the harbors to support the SuperFerry and cruise ships.
- v. Develop a second harbor to increase deep draft berthing.
- vi. Funding to expand runways and improve the terminal facilities at Kahului Airport.
- vii. Funding to improve facilities at public facilities, parks, and beaches, especially restrooms.
- viii. Funding for improvements and maintenance of trails.
- ix. Funding to improve road signage, as well as airport signage.
- x. Funding to expand public transportation to reduce road traffic and enhance the movement of residents and visitors.
- xi. Funding for visitor safety in case of disasters.
- xii. Legislation/rules to control trail usage or number of visitors at sites. To maintain the quality of the trails, as well as the experience.
- xiii. Funding to increase the number of lifeguards at beaches.
- xiv. Emergency plan for West Maui – where do people go? Because there is no way the highway will be able to handle the additional traffic.

2. Visitor Industry

a. Workforce Needs

Currently the unemployment rate on Maui is very low.

- i. Mutual respect between workers and employers.
- ii. Livable wages – should be able to support a family without working two jobs.
- iii. Training on customer service and Hawaiian culture.
- iv. Career paths – employees need to know they can move up within the visitor industry.
- v. Affordable health insurance.
- vi. Transportation to and from work is taking much longer due to employees having to live further from their place of employment due to the price of housing.
- vii. Roads need to be built/maintained to handle the increased traffic.
- viii. Affordable housing.
- ix. Understanding of the benefits of working in the visitor industry.
- x. Visitor industry and school partnerships for recruitment and workforce preparedness that would encourage more students to go into the visitor industry and have the skills necessary to succeed.
- xi. Certification process to acknowledge people/employees who provide higher levels of service and have gained authentic cultural information.
- xii. More interaction and coordination between UH-TIM, Kapiolani Community College, and Maui Community College.

b. Employers Overall Needs

- i. Sufficient number of quality employees.
- ii. Continue to attract current number of visitors to sustain occupancy rates. Some growth in visitor accommodations expected by 2010.
- iii. Respect and support of Maui residents.
- iv. High satisfaction levels among visitors.
- v. High satisfaction levels among employees.
- vi. Innovative approach to housing for employees.
- vii. Understand the carrying capacity of the islands to provide quality of life for residents and quality of experiences for visitors.
- viii. Maintain a unique sense of place for Maui County in order to attract visitors.
- ix. Appropriate targeting of visitors to Maui – accommodations on island targeted to the deluxe, standard, then luxury. Also, insufficient meeting rooms for business-related travel.
- x. Train all employees in businesses that touch visitors (including McDonald's) to provide quality service, as well as be able to provide directions, and some insight into Hawaiian culture.
- xi. Timely information to keep up with the changes of inventory, visitor mix and other sites.
- xii. "Made in Maui" to be expanded.
- xiii. Basic infrastructure improvements in sidewalks, roads, parking.

c. Larger Business Needs

- i. Better regulation of B&Bs and TVRs to maximize the collection of Transient Accommodations Tax (TAT).
- ii. Better education of employees on Hawaiian culture to differentiate the visitor experience and increase understanding of the host culture for visitors as well as employees.
- iii. Increase business travel by marketing to meeting planners.
- iv. Greater access to outside hotel venues as requested by groups.
- v. Develop niche markets, such as the wellness market.

d. Small Business Needs

- i. Access to visitors:
 1. Communicating directly to visitors is too expensive for small business people.
 2. Relationships with tour companies and cruise ships that require discounting of fees make it unlikely that these groups will frequent a small business.
 3. Smaller communities, such as Hāna, cannot accommodate parking for the larger buses, plus a mass influx of visitors would not be a quality Hāna experience.
- ii. Visitors that differentiate between authentic experiences versus created experiences. A means to show the differentiation – a quality seal of approval.
- iii. Mom and Pop businesses are what make areas unique, they need to be supported by the visitor industry, not just drive-bys.
- iv. Arts industry needs access to the visitors, increased marketing.
- v. Greater access to outside hotel venues, as requested by groups.
- vi. Parking and restroom facilities.

e. Communities beyond the major visitor centers

- i. Need parking and restroom facilities and a way to manage the flow of visitors throughout the day and/or week.

f. Cruise Needs

- i. Adequate harbor facilities.
- ii. Quality experience of Maui County for its passengers.
- iii. Continued beauty of Maui County and being welcomed by Maui County residents.

g. Visitor Attractions

- i. The number of visitors at any one time should not exceed a capacity level that is manageable and provides for an enjoyable experience.

3. Visitors

a. Overall Needs

- i. Memorable experience that cannot be achieved anywhere else in the world.
- ii. Quality experience at “highlighted sites,” such as Haleakalā.
- iii. Accurate information to ensure safety and a quality experience.
- iv. Safety and security – ongoing safety in the streets, parks, in the water, as well as disasters. What to do in each situation?
- v. Improve first impression at the airport and the harbor.
- vi. Maui residents that are welcoming and friendly – want to be treated as a guest, not as an intruder. Want to connect with residents.
- vii. Clean, well-maintained and easily accessible restroom facilities around the island including parks, beaches and visitor attractions.
- viii. Statewide coordination and communication regarding events, festivals, plays, etc. on all islands.
- ix. Have a sufficient number of authentic Hawaiian cultural experiences of all types available to participate in and watch.
- x. Range of accommodations at different price points.
- xi. Emergency medical services, especially for West Maui.
- xii. Method of differentiating quality experiences from poor experiences.

b. First Time Visitor Needs

- i. Experience that matches or exceeds expectations, do not need unrealistic expectations.
- ii. Unique experience that only Maui County can offer:
 1. Haleakalā
 2. Historic sites
 3. Maui people
 4. Natural environment for exploring – hikes, snorkeling, sightseeing

c. Repeat Visitor Needs

- i. Quality of environment and experiences to be the same or better than first experienced.
- ii. New attractions and experiences.
 - 1. New outdoor experiences
 - 2. Health and wellness
 - 3. Agri-tourism

d. Cruise Visitor Needs

- i. Visit the highlights of Maui within a day.
 - 1. Convenient transportation on island.
 - 2. Historic sites are not overly crowded.
 - 3. Sufficient restroom facilities – number and quality.
 - 4. Authentic experiences – where are they? How to access them?

4. Residents

a. Overall Needs

- i. Respect from visitor industry – residents feels disenfranchised from the success of the visitor industry. Lack of communication on how the visitor industry benefits them. How does the industry give to the community?
- ii. Respect from visitors – visitors need to be educated prior to arriving on island. Movies, guidebooks, etc., that provide protocol and insights into the “local style” and appropriate respect for cultural and historic sites.
- iii. Two-way communication with the industry and government.
- iv. Increased understanding of how the visitor industry helps the community.
- v. Outlet for frustration – a positive communication process must be put in place for government to “hear” residents.
- vi. Respect and recognition of all the cultural experiences of Maui.
- vii. Provide and maintain quality parks, natural environments and facilities for hiking, going to the beach, picnicking. Private places to remain private.
- viii. Clean, well-maintained, and easily accessible restroom facilities around the island, including parks and beaches.
- ix. Enforce the established park rules.
- x. Feel safe in their own communities.
- xi. Visitor industry should offer more public meetings and community outreach for tourism planning.
- xii. Have a sufficient number of authentic Hawaiian cultural experiences of all types available to participate in and to watch.
- xiii. Concern that the number of new alien species to the islands will be increasing with the advent of the additional cruise ships, the SuperFerry and ongoing ocean traffic of Young Brothers and Matson.
- xiv. Concern about the social impact of the visitor industry.
- xv. Concern about severe beach erosion and making beach preservation a top priority.

b. Hawaiian Community

- i. Promote awareness of culturally significant sites with reasonable access guidelines and protocol instructions.
- ii. All stakeholders require more understanding of the Hawaiian culture.
- iii. Need to feel an integral part of all industries on the island, especially the visitor industry.

c. Smaller, More Rural Communities (Example: Hāna)

- i. The community plans need to take preference over county plans.
- ii. Community needs to feel more in control over its future – minimizing land being purchased by outside interest.
- iii. Access to these communities is becoming more difficult because the roads and bridges are not being repaired. Roads have greater wear because of the number of visitors.
- iv. Rural areas need to retain their own sense of place.

d. Larger Property Owners Needs

- i. Legislation to manage the liability issues of trespassers on private property.
- ii. Guidebooks that do not encourage visitors to hike on private property.
- iii. Tour companies those are respectful of private property.

e. Farmers

- i. Resorts need to connect with farmers to maximize the use of local produce.
- ii. Some farmers need assistance in developing their farms for agri-tourism.

There is overall concern that Moloka'i and Lāna'i needs are lost in the overall plans for Maui County and that a separate plan for each island should be developed.

5. Moloka'i

- a. Management and implementation of the visitor plans on Moloka'i need to be on Moloka'i, not Maui. Maui cannot adequately represent the needs and spirit of Moloka'i.
- b. Plans that involve Moloka'i should be developed by Moloka'i and implemented on Moloka'i. So many plans have been developed but few have been implemented.
- c. Plans need implementation and throughout implementation ongoing communication with the residents.
- d. More flights to Moloka'i for the residents and visitors.
- e. Reduced airfare for residents.
- f. More data on visitors to Moloka'i – why can't they have data on a timely basis?
- g. Preservation of natural resources.
- h. Change perception of Moloka'i. Market Moloka'i separately, not as part of Maui.
- i. On-island transportation system for visitors – trolley, bus.
- j. No stoplights.
- k. Provide agricultural inspection on Moloka'i so visitors don't have to check in again in Honolulu.
- l. Moloka'i does and should continue to embrace the Hawaiian culture.
- m. Funding to complete development and maintain Malama Park and Pala'au State Park.
- n. This TSP needs to include the Moloka'i Responsible Tourism Initiative Report that is being completed.
- o. Coordinate Maui County TSP with the Moloka'i General Plan.
- p. Community-based tourism for Moloka'i.

6. Lāna'i

- a. Assess carrying capacity for the island.
- b. Public transportation within Lāna'i City.
- c. Parking issues at the harbor.
- d. Promote education and dialogue between the community and visitor industry, as well as the visitors and the community.
- e. Educate younger generation and visitors about Lāna'i history, heritage and culture. All cultures important, but Hawaiian is still the host culture.
- f. Restart the Community Development Corporation to umbrella community activities such as historical society, business development, newsletters and community information.
- g. Check on tsunami sirens at Manele Bay.
- h. Emergency health care.
- i. Rebuild cultural center and museum plus a visitor center for both visitors and residents. A gathering place for people to come together.

D: Strategies for Future Consideration

During the planning process, the advisory committee identified a variety of strategies to help achieve plan objectives. Core strategies to be implemented over the next three years are included in the plan. The remaining strategies are listed below for future consideration.

Objective 1: To increase the economic contribution of the visitor industry to Maui County.

- Plan for future target markets with greater geographic diversity.
- Plan to increase the number of visitors from Japan.
- Provide tax incentives for renovation of visitor accommodations to be able to attract higher-spending visitors in the future.
- Consider charging access fees to visitors to popular locations such as Haleakalā at sunrise, road to Hāna, etc.

Objective 2: To make positive contributions to the quality of life for residents such as:

- Livable wages and benefits within visitor industry workforce
 - Increased business opportunities
 - Affordable housing
 - Communities retain their sense of place
- Attract visitors to the island who will respect Hawaiian and local customs and traditions, respect the land and participate in activities to gain greater knowledge of Maui.
 - Encourage/work with the Realtor Association(s) to provide training for salespeople and realtors that include knowledge of local and community values, and Hawaiian culture to visitors who will become residents.
 - Increase the opportunities for community-based agri-tourism.

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

- Create standards and require training for owners of legal B&Bs and TVRs to ensure a quality experience.

Objective 4: To maintain and improve visitor satisfaction with their experience on Maui, Moloka'i, and Lāna'i.

- Develop consistent, accurate signage to provide easy directions and identify communities, historic sites, as well as identifying areas that are dangerous.
- Provide a higher level of service in the visitor industry to:
 1. High-end visitors
 2. Japanese visitors
- Gather more detailed data on what drives visitor satisfaction to support a more informed planning process.

Objective 5: To reinforce authentic Hawaiian culture ensuring the foundation of our unique sense of place and appropriate recognition of our culture.

- Encourage employers to provide merit-based incentives to employees to achieve levels of certification. Attract visitors to Maui who want authentic cultural experiences.

Objective 6: To support the enhancement and maintenance of the natural resources of Maui County.

- Establish guidelines for day use mooring and ensure adequate sewage pump out beyond boundary limits.
- Create opportunities for residents and visitors to “mālama” special places.
- Support the development of an environmental education center for residents and visitors. Consider partnering with existing environmental education sites.

E. Maui County TSP Strategies by State TSP Strategic Initiatives

The State TSP is comprised of nine strategic initiatives. The initiatives are Access, Communications and Outreach, Hawaiian Culture, Marketing, Natural Resources, Research and Planning, Safety and Security, Tourism Product Development, and Workforce Development. To demonstrate how the Maui County TSP complements the State Plan, the strategies included in this plan are cross-referenced by State Initiatives.

Access

- Advocate for improvements to airports and harbors to enhance infrastructure, signage, and Hawai'i ambiance. (Objective 1.d.)
- Identify and implement traffic management systems to minimize congestion during rush hour. (Objective 2.e.)

Communications and Outreach

- Develop and communicate an integrated disaster response plan for preparedness to the state, county, and visitor industry. (Objective 2.c.)
- Enforce regulation, and as necessary, advocate for additional regulations, related to B&Bs and IVUs to ensure that communities retain their sense of place. (Objective 2.g.)
- Support the development of a carrying capacity plan. (Objective 2.h.)
- Promote dialogue between the visitor industry and residents about the role of the visitor industry in the life of the county. (Objective 3.a.)
- Ensure kama'āna are "welcomed" and feel hosted as a visitor by the industry on the islands. (Objective 3.b.)

Hawaiian Culture

- Advocate and support the development of a process of educating visitors prior to or upon arrival on basic information that will enhance their safety and their understanding and appreciation of natural resources and Hawaiian culture. (Objective 4.a.)
- Encourage the development of programs to recognize and share Hawaiian culture and history with residents. Develop a Hawaiian cultural learning program to pass along knowledge to future generations, and encourage young people to consider being a cultural practitioner as a way of life. (Objective 5.a.)
- Encourage Hawaiian cultural practitioners to work together to develop ongoing "authentic" activities for residents, as well as visitors. (Objective 5.b.)
- Increase the likelihood for businesses to assimilate Hawaiian values and culture by developing an orientation process for owners of major Hawai'i visitor industry properties, businesses, and resorts. The objective is to educate these owners, who are ultimately the decision makers, on the importance of Hawaiian culture. A higher level of sensitivity will benefit the state, county, businesses, visitors, and employees. (Objective 5.c.)
- Educate residents, business owners, as well as visitors on "authentic" Hawaiian values, culture, and language usage and pronunciations. Encourage businesses and companies to be respectful of Hawaiian and local culture through music, stories and décor. (Objective 5.d.)

Marketing

- Develop and implement an annual tourism marketing plan to achieve visitor arrival and visitor expenditure targets. (Objective 1.a.)
- Ensure maintenance of ongoing events year-round, with consideration for events that will support the visitor industry during slower periods. (Objective 1.c.)
- Advocate and support the development of a process of educating visitors prior to or upon arrival on basic information that will enhance their safety and their understanding and appreciation of natural resources and Hawaiian culture. (Objective 4.a.)

Natural Resources

- Preserve and maintain a healthy, pristine natural environment for residents and visitors. (Objective 4.d.)
- Provide an inventory of natural resources (including ocean) and identify appropriate levels of usage. (Objective 6.a.)
- Ensure education about the importance and fragile nature of cultural and natural resources for our community's children, visitor industry, and visitors. (Objective 6.b.)
- Increase visitor industry involvement in the Anti-litter Campaigns throughout Maui County. (Objective 6.c.)
- Monitor and enforce regulations of "Environment Crime Stoppers." (Objective 6.d.)
- Support the county in its efforts to control land and beach erosion. (Objective 6.e.)

Research and Planning

- Work with tour guides and publishers to get accurate information to visitors. (Objective 6.f.)
- Ensure successful implementation and tracking of the Maui County TSP, revising the plan and scorecard measures when necessary. (Objective 7.a.)
- Support the efforts on Moloka'i to implement the Moloka'i Responsible Tourism Initiative. (Objective 7.b.)

Safety and Security

- Develop and communicate an integrated disaster response plan for preparedness to the state, county, and visitor industry. (Objective 2.c.)
- Enforce regulation, and as necessary, advocate for additional regulations, related to B&Bs and IVUs to ensure that communities retain their sense of place. (Objective 2.g.)
- Support the County of Maui with emergency preparedness by: (Objective 4.c.)
 - i. Developing a process by which visitors can access information (multi-lingual) in case of an emergency, natural disaster, etc.
 - ii. Ensuring there are adequate emergency facilities to meet the needs of residents and the visitor industry population.
 - iii. Supporting efforts to increase safety and security for visitors and residents at public places, such as beach parks, events, and cultural sites.

Tourism Product Development

- Ensure maintenance of ongoing events year-round, with consideration for events that will support the visitor industry during slower periods. (Objective 1.c.)
- Encourage visitors and the visitor industry, including hotels and cruise ships, to “buy local produce and products.” (Objective 2.b.)
- Advocate and support the development of a process of educating visitors prior to or upon arrival on basic information that will enhance their safety and their understanding and appreciation of natural resources and Hawaiian culture. (Objective 4.a.)

Workforce Development

- Develop programs to attract employees to the visitor industry and increase the available workforce. (Objective 1.b.)
- Develop and sustain education about career opportunities within the visitor industry, from middle school through college. (Objective 2.a.)
- Encourage efforts to support affordable housing for Maui residents to maintain and attract workforce for the visitor industry. Create incentives for landowners, employers, and developers to contribute to affordable housing, particularly near places of employment. (Objective 2.d.)
- Support the control of substance abuse that negatively impacts the workforce and community. (Objective 2.f.)
- Implement and encourage workforce-training programs to ensure quality service that exceeds the expectations of visitors. (Objective 4.b.)
- Encourage the development of programs to recognize and share Hawaiian culture and history with residents. Develop a Hawaiian cultural learning program to pass along knowledge to future generations, and encourage young people to consider being a cultural practitioner as a way of life. (Objective 5.a.)

F: Definition of Sustainable Tourism

What is Sustainable Tourism?

It's informative. Travelers not only learn about the destination, they learn how to help sustain its character while deepening their own travel experiences. Residents learn that the ordinary and familiar may be of interest and value to outsiders.

It supports integrity of place. Destination-savvy travelers seek out businesses that emphasize the character of the locale in terms of architecture, cuisine, heritage, aesthetics, and ecology. Tourism revenues, in turn, raise local perceived value of those assets.

It benefits residents. Travel businesses do their best to employ and train local people, buy local supplies, and use local services.

It conserves resources. Environmentally aware travelers favor businesses that minimize pollution, waste, energy consumption, water usage, landscaping chemicals, and unnecessary nighttime lighting.

It respects local culture and tradition. Foreign visitors learn about and observe local etiquette, including using at least a few courtesy words in the local language. Residents learn how to deal with foreign expectations that may differ from their own.

It does not abuse its product. Stakeholders anticipate development pressures and apply limits and management techniques to prevent the "loved to death" syndrome. Businesses cooperate to sustain natural habitats, heritage sites, scenic appeal, and local culture.

It strives for quality, not quantity. Communities measure tourism success not by sheer numbers of visitors, but by length of stay, money spent, and quality of experience.

It means great trips. Satisfied, excited visitors bring new knowledge home and send friends off to experience the same thing, which provides continuing business for the destination.

Source: National Geographic Online

G: Glossary of Terms

Accommodations Classifications: There are four categories of accommodations: budget, standard, deluxe and luxury -- ranging from lowest priced room rates to highest priced room rates.

Agri-Tourism: Refers to the act of visiting a working farm or any agricultural, horticultural, agribusiness or ranching operation for the purpose of enjoyment, education, or active involvement in the activities of the farm or operation.

Aloha (welcome): “Alo” is to face, to join, to be one with, and “Ha” is the breath of life; together they manifest the intangible spirit of the people of this land. In addition to hello and goodbye, aloha means love, compassion, affection, mercy, pity, sympathy, grace, sentiment, charity and kindness.

Aloha Spirit: Is the multicultural expression of aloha, involving the highest ideals of various ethnic groups that make up our multi-ethnic society. It is the way of life in the value system we have developed as a caring, multi-ethnic community.

Authentic: Those experiences and opportunities that have time depth in expressing, documenting and conveying culture, practice and history, that which is culturally “responsible” to the culture being depicted (i.e. authentic Hawaiian culture).

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

Carrying Capacity: The maximum number of individuals that a given environment can support without detrimental effects.

De Facto Population: An estimated number of people who are actually present in one place at one time.

Domestic Visitor: Visitor who stayed in Hawai‘i for at least one night but less than one year, arriving on flights from the U.S. mainland. A foreign resident from the U.S. mainland is counted as a domestic visitor.

Eco-tourism: Tourism involving travel to areas of natural or ecological interest, typically under the guidance of a naturalist-interpreter, for the purpose of observing wildlife and learning about the environment.

Gross County Product (GCP): Represents the total value of the goods and services produced by the county's economy.

Hawaiian Cultural Practitioner: A person who demonstrates rich and deep knowledge of the culture and history of Hawai‘i by bringing it to life through the continuation of traditional practices, storytelling, blessings, song, chant, and dance. Hawaiian teachings include conflict resolution, spirituality, sacred wisdom, and living in balance with the earth – a philosophy and a lifelong commitment to the land and the people of Hawai‘i.

Infrastructure: The facilities that must be in place in order for a country or area to function as an economy and as a state, including the capital needed for transportation, communication, and provision of water and power, and the institutions needed for security, health, and education.

International Visitor: Visitor who stayed in Hawai‘i for at least one night, but less than one year, arriving on flights from U.S. territories and foreign countries. A U.S. resident arriving in Hawai‘i on a flight directly from a foreign country is counted as an international visitor.

Per-Party Per-Trip: Total spending of the entire members of the party throughout their stay.

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

Sense of Place: The tangible and intangible qualities of one's community which provide and promote continuity to identity, history and attachment to the natural, cultural and historical landscape.

Shoulder Periods: Periods of relatively lower hotel occupancy.

Stakeholders: Defined as individuals or organizations that stand to gain or lose from the success or failure of a system.

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

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

H: Listing of Agencies

County of Maui

CDA	Civil Defense Agency is responsible for planning and administering the County Civil Defense organization for national, natural, man-made, and local disasters.
COC	Chamber of Commerce works on behalf of members and the entire business community to improve the county and state's economic climate and help businesses thrive.
Commission on Culture and the Arts	Commission on Culture and the Arts assists the county in the preservation of the artistic and cultural heritages of all its people, promoting a community environment, which provides equal and abundant opportunity for exposure to culture and the arts in all its forms, encouraging and providing equal opportunity for the development of cultural and artistic talents of the people of the county.
County Council	County Council legislates taxes, rates, fees, assessments and special assessments; conducts investigations of the operation of any department or function of the county and any subject upon which the Council may legislate, and conducts many other duties, including the review, amendment, and passage of an annual operating and capital improvements budget.
DHHC	Department of Housing and Human Concerns supports a wide range of community needs through a combination of direct services administered by the department, grant support to nonprofit service providers, and/or encouraging and facilitating collaboration and partnerships among public and private organizations.
DOP	Department of Planning oversees revisions of the general plan at least every ten years to guide the development of the county; prepares proposed zoning ordinances, zoning maps and rules, and any amendments or modifications; and reviews the lists of and prioritizes proposed capital improvements. This Department also provides support to the Maui Planning Commission, Moloka'i Planning Commission, and Lāna'i Planning Commission.
DPR	Department of Parks and Recreation plans, designs, constructs, maintains, and operates all parks and recreational facilities of the county, develops and implements programs for cultural, recreational, and other leisure activities for the people of the county.
DPW	Department of Public Works and Environmental Management is responsible for protecting the public's health, safety, property and environment by developing and operating the county's infrastructure and administering its building codes.
EC	Moloka'i Enterprise Communities help to protect and enhance Moloka'i's community and environment by accomplishing projects from a 10-year strategic plan. They've raised funds from grants and partnerships to coordinate projects to meet the health needs of the community while creating jobs, establish fire safety to federal standards, develop a rehabilitation center to support youth substance abuse and violence prevention, develop a community-based visitor plan for tourism on Moloka'i, and improve middle school education.
Friends of Haleakalā	Organization created to support educational, cultural, research and service activities relating to the park and its ecosystems.
Haleakalā NPS	National Park Service helps communities across America preserve and enhance important local heritage and close-to-home recreational opportunities. Grants and assistance are offered to register, record and save historic places; create community parks and local recreation facilities. With Haleakalā in particular, NPS conserves rivers and streams, develops trails and greenways, and protects the bond between the land and its people. The park also cares for endangered species, some of which exist nowhere else.
Hui Malama I Nā Kūpuna 'O Hawai'i Nei	Hui Mālama I Nā Kūpuna 'O Hawai'i Nei (Group Caring For the Ancestors of Hawai'i), is a native Hawaiian group dedicated to the "proper treatment of ancestral native Hawaiians" by protecting and preserving Native Hawaiian burial sites and repatriating funerary remains and objects to their original siting.
LVB	Lāna'i Visitors Bureau promotes the interests of Lāna'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.

MACC	Maui Arts and Cultural Center is a non-profit organization that coordinates community events, art exhibits, educational activities, church services, service club meetings, recitals, concerts and other performances.
Maui Coastal Land Trust	Maui Coastal Land Trust acquires, preserves, and protects coastal lands in Maui Nui (i.e., the islands of the County of Maui) for the integrity of the natural environment and the enjoyment of current and future generations.
Maui Youth Connection	Maui Youth Connection is a program by the county that involves children in sports, activities, education, culture and arts, environment, job training, and mentoring.
Mayor	Chief executive officer of the county exercises the executive powers of the county and is responsible for enforcing the provisions of and executing the duties conferred by the Charter, ordinances, and other applicable laws, and coordinating the drafting of the operating and capital improvements budget.
MCC-VITEC	Maui Community College – Vital, Innovative Training and Economic Development Center is a college of continuing education and training in the University of Hawai'i system.
MCFB	Maui County Farm Bureau is a grassroots organization of farm and ranch families, allied agricultural industries, and other organizations joined together in a common goal of supporting agriculture in Maui County. MCFB offers an opportunity for farmers to network and share in their community similar interests and goals.
MEDB	Maui Economic Development Board, Inc., a non-profit corporation that assists the County of Maui in pursuing a high tech future. Works with the Maui Visitors Bureau to attract and/or develop science and technology conferences and symposiums on Maui.
MEO	Maui Economic Opportunity, Inc. is a private, non-profit Community Action Partnership Agency that assists individuals in providing emergency assistance, job placement, training, and other support services. As well as providing loans and training to start small businesses, create jobs and boost the community's economy.
MFD	Maui County Fire Department provides fire fighting and rescue work to save lives and properties from fires and emergencies.
MHLA	Maui Hotel and Lodging Association is a trade association of hotels, hotel management firms, hotel owners, suppliers, and other related firms and individuals. Mission of the MHLA 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.
MPD	Maui County Department of Police preserves the public peace, prevents crimes, detects and arrests law offenders, protects the rights of persons and property, and provides traffic safety and education.
MVA	Moloka'i Visitors Association promotes the interests of Moloka'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.
MVB	Maui Visitors Bureau promotes the interests of Maui County and works with the HVCB and HTA's other international marketing partners to market and promote leisure and business travel, including meetings and conventions.
OED	Office of Economic Development promotes and nurtures sustainable economic development within Maui County, consistent with the community's needs and priorities. OED works with the community, business, and government sectors to strengthen and diversify the economy by supporting existing businesses and assisting in the attraction, development, and expansion of new businesses.
RISE	Restaurant Industry Service Excellence is a Train-the-Trainer program developed by VITEC in a partnership with the Maui Chamber of Commerce under a grant from DLIR to train restaurant managers in how to train their staff in service excellence.

RITE	Retail Industry Training in Excellence is a Professional Sales Associate curriculum. This program is designed to increase professionalism, overall skill level and advancement opportunities for current retail employees, and gives a basic overview of retail operations to those interested in retail. This was piloted with great success in Maui with the Maui Chamber of Commerce and VITEC (Visitor Industry Training and Economic Development Center) through a grant received from the State Department of Labor and Industrial Relations Employment and Training Fund.
TSC	Traffic Safety Council advises or assists the County Council in all matters relating to traffic safety. Makes recommendations to the County Council on all traffic safety measures referred to it. Prepares and recommends traffic safety programs for adoption by the County Council.
ZAED	Zoning Administration and Enforcement Division enforces state and county zoning ordinances and enforcement. This division also provides all administrative support for the Board of Variances and Appeals.

Hawai'i State and Other Agencies

ADAD	The Alcohol and Drug Abuse Division is the primary and often sole source of public funds for substance abuse treatment. ADAD's treatment efforts are designed to promote a statewide culturally appropriate, comprehensive system of services to meet the treatment and recovery needs of individuals and families.
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.
CTAHR	The College of Tropical Agriculture and Human Resources – University of Hawai'i at Mānoa provides education to students and all citizens of Hawai'i for life in the global community through research and educational programs supporting tropical agricultural systems that foster viable communities, a diversified economy, and a healthy environment.
DBEDT	Department of Business, Economic Development and Tourism works to diversify the economy, expand existing business, and attract new economic activity.
Dept. of Taxation	Department of Taxation administers and enforces tax laws of the state, including the state excise tax and the Tourism Accommodations Tax.
DLIR	Department of Labor and Industrial Relations administers programs that improve job opportunities, protect workers' employment rights, and assure a safe and healthy work environment.
DLNR	Department of Land and Natural Resources 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. Also administers the state conservation districts and the endangered species, natural area reserves, boating and ocean recreation, and historic preservation programs.
DOA	Department of Agriculture 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 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).
DOT	Department of Transportation is 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.
DOTA	Department of Transportation Airports is a division of DOT that is in the interest of flight safety and the promotion of aviation in the Hawai'i Islands.

DPW	Department of Public Works is responsible for all matters relating to engineering of public and private building construction, inspection, and maintenance of public streets, including highways, bridges, drainage facilities, environmental management, and water supply.
DPWWM	Department of Public Works and Waste Management administers the building and housing codes and subdivision and zoning ordinances and rules; approves proposed subdivision plans, supervises and maintains the county's highways, drainage and flood control systems and sewer systems, and maintains the county's buildings.
FEMA	Federal Emergency Management Agency funds emergency programs and provides technical guidance and training to ensure a broad-based emergency program to protect public safety and property.
Fish & Wildlife Service	The Pacific Islands Fish and Wildlife Service Office consists of National Wildlife Refuges and Ecological Services consisting of Endangered Species and Habitat Conservation, as well as a support staff specializing in Administration, External Affairs, and Geographical Information Systems. The Fish and Wildlife Service is the world's largest and most diverse collection of lands set aside specifically for wildlife that provide habitat and protection that endangered and native species need in order to survive in the wild.
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.
HTA	Hawai'i Tourism Authority strengthens Hawai'i's vital visitor industry by formulating policy, conducting research, coordinating development and implementation of the Tourism Strategic Plan, supporting product development and coordinating the worldwide marketing of Hawai'i as a visitor destination.
Legislature	Convenes once a year in Regular Session (between January and May) to consider subjects for legislation, including an annual state operating and capital improvements budget. Includes standing committees on tourism, the environment, and economic development.
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.
National Park Services	National Park Service helps communities across America preserve and enhance important local heritage and close-to-home recreational opportunities. Grants and assistance are offered to register, record and save historic places; create community parks and local recreation facilities; conserve rivers and streams, and develop trails and greenways.
Nature Conservancy	The Nature Conservancy is the leading conservation organization working to protect the most ecologically important lands and waters around the world for nature and people.
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.
NRCS	Natural Resources Conservation Service (originally called the Soil Conservation Service) has provided leadership in a partnership effort to help America's private landowners and managers conserve their soil, water, and other natural resources. NRCS partners with Conservation Districts and others to provide technical and some cost-share assistance to private landowners. The main goal is to protect, enhance, and preserve the state of Hawai'i's soil, water, air, plants, and animals using sound science and expertise.
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.
OP	Office of Planning maintains overall framework to guide the development of the state through comprehensive, long-range, and strategic planning to meet the needs of Hawai'i's people and provide for the wise use of Hawai'i's resources.

PUC	Public Utilities Commission has general supervision over all public utilities. Examines the condition of each public utility, its operation, and the safety, hours, and wages of its employees.
Sierra Club	Sierra Club – Hawai'i Chapter, is a non-profit that works to restore air and water quality, to protect and restore the land and preserve biological diversity, and to conserve Hawai'i's resources through education, litigation, lobbying, electoral politics, etc.
TSA	Transportation Security Administration formed immediately following the tragedies of September 11, 2001. TSA is a component of the Department of Homeland Security and is responsible for security of the nation's transportation systems.
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-TIM	School of Travel Industry Management provides training for students interested in working in the travel industry.
USDA-NRCS	United States Department of Agriculture – Natural Resources Conservation Service provides leadership in a partnership effort to help people conserve, maintain, and improve our natural resources and environment.
WIB	Workforce Investment Board is to develop local workforce investment plans in coordination with economic development, to certify and oversee "ONE-STOP" operators, identify eligible providers/vendors of the training services, provide grants for youth activities and meet agreed upon level of performance.

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