

## **II. CORA OPERATOR SURVEY**

### **A. INTRODUCTION**

CORA businesses have likely been in operation on Maui ever since the first tourists arrived on the island. Visitors may have witnessed island residents participating in water sports such as surfing or paddling in an outrigger canoe and sought participation. In 1995, the County of Maui adopted the first ordinance designed specifically to regulate commercial operations at County beach parks. By the 2004/2005 permit cycle, there were 57 CORA operations permitted by the Department offering lessons and excursions in a variety of activities.

### **B. ROLE OF CORA OPERATIONS IN MAUI VISITOR INDUSTRY**

With an annual visitor count of 2.1 million visitors in 2003, who stayed an average of 7.33 days and an average daily census of 42,710 visitors on Maui island alone, it is likely that there are many visitors who are interested in participating in CORA (Maui County Data Book, 2004). This is further supported by the fact that 77.9 percent of U.S. visitors to Maui County reported that they participated in snorkeling/scuba diving during their visit in 2003. Additionally, 53.1 percent of U.S. visitors stated that they participated in jet skiing, parasailing or windsurfing in 2003 (Maui County Data Book, 2004). It would be reasonable to conclude, therefore, that these CORA operations provide a valuable service for visitors to Maui County. This would further equate to economic value, based on the revenues CORA businesses generate each year. In addition to tourists, it is important to note that local residents also receive instruction or participate in tours offered by CORA operators.

At present, CORA operations offer a variety of services, including lessons and group tours in a variety of ocean activities including surfing, kayaking, scuba diving, kiteboarding, snorkeling and windsurfing. By educating and

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instructing patrons in the different water sports, certified instructors are able to help visitors learn the techniques needed for some of the more complex sports, such as windsurfing or kiteboarding or certification to participate in certain sports, such as scuba diving. In other cases, operators share their local knowledge of the ocean areas and aquatic life and provide visitors with a quality recreational experience.

**C. CORA SURVEY GOAL AND OBJECTIVES**

This chapter provides an analysis of the results of the CORA survey that was provided to the permitted CORA operators. The objectives of the survey were:

- To collect baseline data on CORA company operations on Maui.
- To gain an understanding of frequency of use at individual beach parks.
- To gain an understanding of use of facilities at individual beach parks.
- To gain an understanding of future plans for expansion at individual beach parks.

In addition, the survey served as a vehicle for receiving operator comments which provided additional insight on CORA issues and concerns.

**D. CORA SURVEY DATA RESULTS**

As previously noted, a survey was prepared for the CORA permittees to gain a better understanding of frequency of operation, use of facilities and future plans for expansion, at the 17 selected County beach parks. See Appendix "B". Survey forms were distributed at the informational meeting held on March 1, 2005 and the remaining surveys were mailed to CORA operators on March 2, 2005. It is noted that although 2004/2005 Department of Finance data indicated that there were 57 CORA permit

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holders, information on the study was returned for three (3) operators with no forwarding address. An attempt was made to update their addresses through other CORA operators, however, none were found. Of the 54 surveys that were distributed to current CORA permit holders, a total of 29 (53.7 percent) CORA surveys were returned. The following is an analysis of the survey results based on the responses of the 29 returned surveys.

**1. Company Profile**

**a. Total Number of Employees**

Responses varied from a total of one (1) employee for the operation to 105 employees. Comments also noted that there were part-time employees or seasonal employees who are not employed throughout the year. A majority of the employees were certified instructors or support/office staff. The company with 105 employees noted that it had a large retail staff for its stores, as opposed to the number of employees involved in CORA operations at County beach parks.

**b. Years in Business**

Responses varied from one (1) year to 31 years of doing business on Maui. Of the 29 responses received:

- Four (4) CORA companies have operated on Maui for up to 5 years;
- Eight (8) companies have operated on Maui between 6 to 10 years;
- Eight (8) companies have operated between 11 to 20 years; and
- Nine (9) companies have done business on Maui between 21 to 31 years.

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c. **Company Vehicles**

Responses varied from one (1) vehicle used, to up to seven (7) vehicles. Most operations use trucks, sport utility vehicles or vans.

d. **Operation Time**

Out of the 29 CORA survey respondents, 28 stated that they were year-round operations and one (1) operates seasonally.

2. **Ocean Activity Information**

a. **CORA Activities Offered**

Of the 29 responses received, Table II-1 illustrates the number of CORA operators that offer the various ocean recreation activities. There were several CORA operators who offered more than one (1) activity. Scuba was the most popular activity offered by respondents with 14 operators offering the activity. See Table II-1. No responses were received from SNUBA operators. In two (2) cases, CORA operators offered a combined kayak/snorkel tour, however, data was entered only under "kayak". Additionally, comments were received from several CORA operators that many, if not all of the CORA activities, are weather dependent and thus required operators to offer multiple activities. For example, if there was no wind on a particular day, windsurfing and kiteboarding activities could not be undertaken. However, conditions may be appropriate for surfing, so operators would encourage consumers to try surfing instead.

**Table II-1**

| <b>ACTIVITIES OFFERED AS INDICATED<br/>BY SURVEY RESPONSES</b> |                                                    |
|----------------------------------------------------------------|----------------------------------------------------|
| <b>Activity</b>                                                | <b>No. of CORA Operators<br/>Offering Activity</b> |
| Scuba                                                          | 14                                                 |
| Surfing                                                        | 13                                                 |
| Snorkeling                                                     | 8                                                  |
| Kayaking                                                       | 8                                                  |
| Kiteboarding                                                   | 7                                                  |
| Windsurfing                                                    | 6                                                  |
| SNUBA                                                          | 0                                                  |
| Other                                                          | 0                                                  |

Of the 29 responses, 28 CORA operators noted that they provide instruction in the activities they offer; some CORA operators also commented that the use of equipment is included in the lessons.

**b. CORA Company Profile**

When asked what percentage of business is attributed to advance reservations for lessons and/or equipment rental, responses varied from 20 percent (20%) of their business to 100 percent (100%). Responses to the follow-up question as to what percentage of business is attributed to walk up lessons and/or equipment rentals, answers ranged from 0 percent (0%) to 80 percent (80%). Several respondents noted that no money exchanged at the beach park. Others noted that they accounted for walk up customers as those who saw them at the beach park and made a reservation for

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a later date.

Ten (10) of the CORA operators responding noted that they provided transportation to the beach parks for their clients. The percentage of customers they transported ranged from 25 percent (25%) to 100 percent (100%). See Table II-2.

**Table II-2**

| <b>TRANSPORTATION FOR CUSTOMERS AS INDICATED BY SURVEY RESPONSES</b> |                                                  |
|----------------------------------------------------------------------|--------------------------------------------------|
| <b>CORA Operator Code<sup>a</sup></b>                                | <b>% of Customers Transported to Beach Parks</b> |
| 106                                                                  | 80%                                              |
| 107                                                                  | 80%                                              |
| 113                                                                  | 40%                                              |
| 118                                                                  | 50%                                              |
| 123                                                                  | 25%                                              |
| 134                                                                  | 100%                                             |
| 138                                                                  | 100%                                             |
| 151                                                                  | 90%                                              |
| 159                                                                  | 95%                                              |
| 160                                                                  | 100%                                             |

<sup>a</sup> Each survey questionnaire was assigned a CORA Operator Code. The intent of the code assignment is to maintain confidentiality of responses provided by each respondent.

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c. **Beach Park Use Assessment**

Table II-3 provides a summary of beach parks used by the CORA operators who responded to the survey. Based on the survey results, Makena Landing Beach Park was the beach park used by most CORA operators, followed by Ulua/Mokapu Beach Park and Kanaha, Ukumehame and Maluaka beach parks. Papalaua, Waipuiani, Waihee, and Hana Bay beach parks all had only one (1) response. See Table II-3 for responses on all 17 beach parks.

**Table II-3**

| <b>BEACH PARK USAGE AS INDICATED<br/>BY SURVEY RESPONSES</b> |                                             |
|--------------------------------------------------------------|---------------------------------------------|
| <b>Beach Park</b>                                            | <b>No. of CORA Operators<br/>Using Park</b> |
| Makena Landing                                               | 15                                          |
| Ulua/Mokapu Beach Park*                                      | 11                                          |
| Kanaha Beach Park                                            | 7                                           |
| Ukumehame Beach Park                                         | 7                                           |
| Maluaka Beach Park                                           | 7                                           |
| Hanakao Beach Park                                           | 5                                           |
| Kalama Park North                                            | 4                                           |
| D.T. Fleming Beach Park                                      | 4                                           |
| Kamehameha Iki (Armory) Beach Park                           | 4                                           |
| Palauea Beach Park*                                          | 4                                           |
| Memorial Park (Mai Poina Oe Iau)                             | 3                                           |
| Keawekapu Beach Park*                                        | 3                                           |
| Wahikuli Wayside Beach Park                                  | 3                                           |
| Papalaua Beach Park*                                         | 1                                           |
| Waipuilani Beach Park*                                       | 1                                           |
| Waihee Beach Park                                            | 1                                           |
| Hana Bay Park                                                | 1                                           |

\* Note: These beach parks were not initially specified in the CORA Study, but were added at a later date. The responses reflect answers written in by CORA operators.

CORA operators were also asked if they utilized more than one (1) park for their activities and whether the company operated out of more than one (1) beach park on a single day. Eight (8) of the respondents noted that they may operate out of more than one (1) beach park per day. See Table II-4.

**Table II-4**

| <b>MULTIPLE BEACH PARK USE AS INDICATED BY SURVEY RESPONSES</b> |                                                  |
|-----------------------------------------------------------------|--------------------------------------------------|
| <b>CORA Operator Code</b>                                       | <b>More Than One Beach Park Per Day Utilized</b> |
| 110                                                             | Yes                                              |
| 113                                                             | Yes                                              |
| 136                                                             | Yes                                              |
| 138                                                             | Yes                                              |
| 149                                                             | Yes                                              |
| 155                                                             | Yes                                              |
| 156                                                             | Yes                                              |
| 159                                                             | Yes                                              |

For each beach park utilized, CORA operators were asked to list the activities offered, the days of the week utilized and the hours that the beach park was used. Secondly, operators were then asked for each beach park utilized, to note the activities offered, the number of activity lessons per day, the number of equipment rentals per day and the types of equipment rented. Table II-5 provides a summary of responses received.

**Table II-5**

**BEACH PARK USE SUMMARY AS INDICATED BY SURVEY RESPONSES**

| <b>Beach Park</b>                | <b>Activities Offered</b>                           | <b>Days of the Week Used</b> | <b>Hours Used</b>                       | <b>No. of Lessons</b>                   | <b>Type of Equipment Utilized</b>  |
|----------------------------------|-----------------------------------------------------|------------------------------|-----------------------------------------|-----------------------------------------|------------------------------------|
| Makena Landing                   | Scuba (incl Night Dives), Kayaking and Snorkeling   | up to seven (7) days a week  | Varies, depending on use; 6am-10pm      | 1-2 lessons per day                     | Scuba gear as part of activity     |
| Ulua/Mokapu Beach Park           | Scuba (incl Night Dives)                            | up to seven (7) days a week  | Varies, depending on use; 6am-10pm      | 1-2 lessons per day                     | Scuba gear as part of activity     |
| Kanaha Beach Park                | Windsurfing, Kiteboarding, Surfing and Scuba Diving | up to six (6) days a week    | Varies, depending on use; 8:30am-Sunset | Varies, from 2 per day to 30 per day    | Kites, board, safety vest, strings |
| Ukumehame Beach Park             | Scuba and Surfing                                   | up to six (6) days a week    | Varies, depending on use; 8am-5pm       | Limited data                            | No Data                            |
| Maluaka Beach Park               | Snorkeling and Scuba                                | up to seven (7) days a week  | Varies, depending on use; 7am-2pm       | Limited data, 2- 4 per day              | Snorkel included with activity     |
| Hanakaoo Beach Park              | Scuba and Kayaking                                  | Limited data                 | Varies, depending on use - Limited data | Varies, 1-3 trips per day or less often | No Data                            |
| Kalama Park North                | Surfing                                             | up to six (6) days a week    | Varies, depending on use - Limited data | Limited data                            | No Data                            |
| Memorial Park (Mai Poina Oe lau) | Windsurfing and Kiteboarding                        | up to six (6) days a week    | Varies, limited data                    | Limited data, 30/year                   | No Data                            |
| D.T. Fleming Beach Park          | Surfing and Kayaking                                | up to six (6) days a week    | Varies, limited data 7am-2pm            | Limited data                            | No Data                            |
| Kamehameha Iki (Armory) Park     | Surfing                                             | up to seven (7) days a week  | Varies, limited data 7:30am-4:30pm      | Limited data, 1-19 per day              | No Data                            |
| Palauea Beach Park               | Scuba                                               | up to seven (7) days a week  | Varies, limited data 7:30am-5pm         | Limited data, 2 per day                 | Equipment included in activity     |
| Keawekapu (I) Beach Park         | Scuba                                               | up to seven (7) days a week  | Varies, limited data 6am-5pm            | Limited data, up to 2 per day           | No Data                            |
| Wahikuli Wayside Beach Park      | Scuba                                               | up to seven (7) days a week  | Varies, limited data 8am-5pm            | Limited data, up to 2 per day           | No Data                            |
| Papalaua Beach Park              | Scuba                                               | Very limited data            | Very limited data                       | Very limited data                       | No Data                            |
| Waipuilani Beach Park            | Windsurfing and Surfing                             | Very limited data            | Very limited data                       | Very limited data                       | No Data                            |
| Waihee Beach Park                | No response                                         | No response                  | No response                             | No response                             | No Data                            |
| Hana Bay Park                    | No response                                         | No response                  | No response                             | No response                             | No Data                            |

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It is noted that some of the parks had a limited response rate of three (3) or fewer responses. Further, some questions were not answered completely or no response was provided.

For each CORA activity, respondents were asked the approximate amount of park space used for set up of equipment and/or class instruction, the duration of use and the location of use. Table II-6 provides a summary of use for each CORA activity. Survey responses varied for each activity. It appears from survey responses that kiteboarding may require the largest amount of space for set up and/or lessons, using up to 3,000 square feet of area on the beach. According to survey responses, scuba uses the least amount of space with 0 to 100 square feet of space used in the parking lots, park area and/or beach area.

**Table II-6**

| <b>ACTIVITY USE SUMMARY AS INDICATED BY SURVEY RESPONSES</b> |                                         |                                     |                                                        |
|--------------------------------------------------------------|-----------------------------------------|-------------------------------------|--------------------------------------------------------|
| <b>Activity</b>                                              | <b>Amount of Space Used</b>             | <b>Duration of Use</b>              | <b>Location of Use</b>                                 |
| Windsurfing                                                  | Limited data, 400 sq. ft.               | Varies, 30 minutes to 4 hours       | Parking Lot, Park Area and Beach Area, Ocean           |
| Surfing                                                      | Varies, 20 sq. ft. to 600 sq. ft.       | Varies, 15 minutes to 5 hours       | Parking Lot, Park Area and Beach Area, Ocean           |
| Snorkeling                                                   | Limited data, 30 sq. ft. to 400 sq. ft. | Varies, 30 minutes to 3 hours       | Park Area and Parking Lot, Ocean                       |
| Scuba Diving                                                 | Varies, none to 100 sq. ft.             | Varies, 15 minutes to 4 hours       | Parking Lot, Roadside, Park Area and Beach Area, Ocean |
| Kiteboarding                                                 | Varies, 10 sq. ft. to 3,000 sq. ft.     | Varies, under 10 minutes to 4 hours | Beach Area, Ocean                                      |
| Kayaking                                                     | Varies, 30 sq. ft. to 800 sq. ft.       | Varies, 20 minutes to 2 hours       | Beach Area, Ocean                                      |
| SNUBA                                                        | No responses                            | No responses                        | No responses                                           |
| Other                                                        | No responses                            | No responses                        | No responses                                           |

Student to instructor ratios varied for each activity. According to survey results, kiteboarding had the lowest ratio of one (1) student per one (1) instructor in the water, while Kayaking may have up to 10 students or customers per instructor or guide. Surfing, windsurfing, scuba and snorkel respondents noted that they could have a ratio ranging from two (2) students/customers to one (1) instructor/guide to six (6) students/customers to one (1) instructor/guide.

Varied responses were received with respect to the facilities utilized at the beach parks. It is noted that some of the beach parks have unimproved areas or have limited

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facilities, while others have numerous facilities available. A majority of respondents noted that they utilize the restrooms, including portable toilets (24 CORA operators). Parking, whether paved or unpaved, and showers were the next two (2) most commonly used facilities at the beach parks. See Table II-7.

Table II-7

| FACILITIES USED AT COUNTY BEACH PARKS AS INDICATED BY SURVEY RESPONSES |           |           |                |             |               |            |            |                     |           |               |
|------------------------------------------------------------------------|-----------|-----------|----------------|-------------|---------------|------------|------------|---------------------|-----------|---------------|
| CORA Operator Code                                                     | Showers   | Restrooms | Changing Rooms | Parking Lot | Picnic Tables | Telephones | BBQ Grills | Electrical Hook Ups | Pavilions | Water Faucets |
| 106                                                                    | X         | X         | X              | X           | X             |            |            |                     |           |               |
| 107                                                                    |           | X         |                | X           |               |            |            |                     |           |               |
| 108                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 109                                                                    | X         | X         |                | X           | X             |            |            |                     |           |               |
| 110                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 113                                                                    | X         | X         | X              | X           |               |            |            |                     |           |               |
| 115                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 117                                                                    | X         | X         | X              | X           | X             |            |            |                     |           |               |
| 118                                                                    |           | X         |                | X           |               |            |            |                     |           |               |
| 120                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 123                                                                    |           | X         |                | X           |               |            |            |                     |           |               |
| 124                                                                    |           | X         |                | X           |               |            |            |                     |           | X             |
| 125                                                                    | X         | X         |                |             |               |            |            |                     |           |               |
| 126                                                                    |           |           |                |             |               |            |            |                     |           |               |
| 132                                                                    | X         | X         |                | X           |               |            |            |                     |           | X             |
| 133                                                                    |           |           |                |             |               |            |            |                     |           |               |
| 134                                                                    | X         | X         |                |             | X             |            |            |                     |           |               |
| 136                                                                    |           |           |                |             |               |            |            |                     |           |               |
| 138                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 144                                                                    | X         | X         |                |             |               |            |            |                     |           |               |
| 146                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 149                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 151                                                                    |           | X         |                |             |               |            |            |                     |           |               |
| 154                                                                    | X         | X         |                | X           | X             |            |            |                     |           |               |
| 155                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 156                                                                    | X         | X         |                | X           |               |            |            |                     |           |               |
| 159                                                                    | X         |           |                |             |               |            |            |                     |           |               |
| 160                                                                    |           | X         |                |             |               |            |            |                     |           |               |
| 161                                                                    |           |           |                |             |               |            |            |                     |           |               |
| <b>TOTAL</b>                                                           | <b>19</b> | <b>24</b> | <b>3</b>       | <b>19</b>   | <b>5</b>      | <b>0</b>   | <b>0</b>   | <b>0</b>            | <b>0</b>  | <b>2</b>      |

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3. **Future Plans for CORA Operations**

a. **Plans for Expansion**

CORA operators were asked whether or not they intended to expand their operations in the next five (5) to ten (10) years. Of the survey respondents, 18 CORA operators indicated that they intend to expand their business. Of the 18 respondents, seven (7) answered that they would like to increase the variety of ocean recreation activities offered; 14 answered that they would like to increase the rentals and/or lessons in the activities they currently offer and eight (8) responded that they would like to offer activities at additional County beach parks. There were two (2) respondents who noted that other ways they would like to expand their companies would be to offer off-island tours and expand operations to State beach parks.

b. **Increase of CORA Permit Fees**

Of the survey responses received, 12 CORA operators noted that they would support an increase in the CORA permit fees if it would allow for improved services, such as enforcement (i.e. hiring of Park Rangers) or better infrastructure (restroom facilities, paved parking lots, etc). See Table II-8.

Table II-8

| <b>CORA OPERATORS WILLING TO PAY HIGHER PERMIT FEES FOR IMPROVEMENTS, AS INDICATED BY SURVEY RESPONSES</b> |                                                                                                                            |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <b>CORA Operator Code</b>                                                                                  | <b>Would you support an increase in the County permit fees for CORA operators if it would allow for improved services?</b> |
| 106                                                                                                        | Yes                                                                                                                        |
| 107                                                                                                        | Yes                                                                                                                        |
| 117                                                                                                        | Yes                                                                                                                        |
| 118                                                                                                        | Yes                                                                                                                        |
| 123                                                                                                        | Yes                                                                                                                        |
| 136                                                                                                        | Yes                                                                                                                        |
| 146                                                                                                        | Yes                                                                                                                        |
| 149                                                                                                        | Yes                                                                                                                        |
| 151                                                                                                        | Yes                                                                                                                        |
| 154                                                                                                        | Yes                                                                                                                        |
| 160                                                                                                        | Yes                                                                                                                        |
| 161                                                                                                        | Yes                                                                                                                        |

**4. Comments Received from CORA Operators**

The last portion of the CORA survey asked operators for any additional comments on the CORA permit process or County beach parks. The following are summaries of the comments received that were pertinent to the CORA survey.

**Beach Park Conditions**

- Lack of facilities at beach parks.
- During growth of tourism industry, there has been negligible improvements at the parks. County has been trying to have CORA operations pay for improvements. CORA companies

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provide a service to the community (visitors and residents alike). If CORA businesses close, the strain on the parks will not be reduced and people utilizing the parks will be deprived of a service that makes the parks safer.

- Need more infrastructure at kiteboarding section of Kanaha Beach park.

### **Additional Beach Parks**

- Add Launiupoko back on the list of permitted beach parks.
- Ocean conditions change every day which means that dive and surf sites must change, depending on the weather. If the same parks are used for CORA operations, it may increase the percentage of injuries and accidents.
- By limiting CORA businesses to a certain number of beaches, the County will ensure overuse of a smaller number of locations and inevitably force many companies out of business.
- There is a need for flexibility in selecting operating locations to address changing weather conditions.
- Suggest reopening closed beach parks to reduce the overcrowding on permitted beach parks.

### **CORA Rules and Fees**

- Effective rules will upgrade the safety of the people who use the park and will create a professional service to the community.
- Willing to risk permit in a bidding process for permits in order to create a safe and enforceable process that forces a level playing field. If the permit process remains intact as it is, then enforcement is essential.
- Some companies have disregard for the rules and it is frustrating for a company who is doing the right thing.
- CORA permit process is stressful. No access to the ocean means no jobs.
- Monies collected for permit fees never go to the beach parks. If the fees paid are directed to the beach parks then a fee increase would be more palatable.
- Set and enforce reasonable student quotas for each permitted beach park location.
- Equipment rental operators do not need a CORA permit, however, they have an impact on beaches. Rental operators should be permitted separately to share in costs.
- CORA permit fees should be based on number of students

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per class. This type of rule would result in charging CORA operations by their class size which should relate to their impact. For example, permit fees could be issued on a 3 students/guests per instructor ratio at a fixed rate. For a 10 students/guests per instructor ratio, cost for the permit would be higher. Frequency of use at the beach parks (i.e., how many days a week) could be factored into the cost of the permit.

- Equipment rental operators should be limited by the number of rentals per CORA permit.
- Beginners and larger groups have a larger impact than experienced divers in private tours. Permit fees should be for park use, not each park having its own fee.
- CORA operation signs and banners at beach parks should be prohibited to minimize solicitation.

### **Enforcement**

- The Parks Department's proposal to pay for park rangers at \$73,000.00 per year for enforcement is a waste of park resources. County police should be utilized to enforce administrative rules. Monies in the Parks' budget should be used for additional environmental assessments of other County beach parks.
- Ocean recreational operators that do not have permits need to be removed from the beach parks.
- An anonymous hotline should be set up for the general public and CORA operators to contact the Parks Department when they observe CORA rule infractions or operators soliciting business without a permit.

### **Beach Park Use**

- It is difficult to estimate use at beach parks because activities are dependent on customer availability, the demand for activities and weather conditions.
- CORA operations have been around for many years and in parks with no lifeguards, CORA operators have assisted other beach users in emergency situations.
- The impacts of CORA instruction and tours may be less than the general public who rent equipment such as kayaks, windsurfing gear, etc. and use them at the beaches. Although they are not regulated through permits, there are reports that equipment rental operators offer instruction in ocean activities with the rental of equipment.

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- Sundays and holidays should be off limits for all commercial activities at beach parks.

**E. SUMMARY AND CONCLUSIONS OF CORA OPERATOR SURVEY RESULTS**

**1. Survey Limitations**

As previously mentioned, 29 surveys were returned out of the 54 that were distributed to CORA operators. While the return rate was high (54 percent), it is important to note that some of the surveys were incomplete. Central to the results and the CORA study overall was the usage information for the beach parks. While some respondents were able to give an approximate number of lessons or excursions per day, others provided information on a per week, month or even yearly basis, which made analysis difficult. Follow-up calls were made to CORA operators to verify their responses, however, not all operators responded.

Second, it is also important to note that many of the CORA operators in their written comments and in conversation, stated that their businesses are weather dependent. It was difficult for many operators to estimate the amount of usage at a particular beach park because weather conditions dictate parks selected for the day. According to operators, usage varies from year to year.

Third, the decision was made by the Department to revise the list of beach parks to be included in the CORA study after the survey was finalized. Thus, five (5) of the beach parks noted in the survey were no longer included in the study and were replaced by five (5) new beach parks. It is noted, however, that respondents were given the opportunity to write in the new beach parks and to

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provide information on these parks.

Fourth, there was no financial data collected in the survey. Thus, no conclusions can be drawn about the economic contributions of CORA operations on Maui.

Finally, the survey addressed CORA operations only. It did not take into account visitors who rent equipment and utilize the beach parks for recreation, nor did it account for residents who may own their equipment and utilize the beach parks. Equipment rental operations are not required by County ordinances to apply for CORA permit.

**2. Survey Conclusions**

The data collected from the 29 CORA operators provides the study with a baseline of information on CORA operator use. All CORA permit holders were given two (2) weeks to respond and return their surveys. Surveys received beyond the return deadline were also included. In drawing conclusions from the survey data, it is important to note a commonly expressed view that CORA operations are weather dependent. Therefore, ocean conditions will dictate the extent of park usage for any given ocean activity.

A majority of survey respondents have been in business on Maui for over five (5) years. Some operations employ one (1) to 15 people, while larger operations with a retail component employ over 100 employees. A majority of them operate year-round, providing instruction and/or tours for customers.

It appears from the responses received that CORA operations may

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utilize the County beach parks up to seven (7) days a week for periods of time ranging from one (1) hour to eight (8) hours. Customers, whether participating in lessons or excursions, could be in parties as large as ten (10) people per instructor, depending on the activity. The frequency of trips (i.e., multiple trips per day) per operator or activity was not readily apparent in the survey results. However, the popularity of individual beach parks for CORA activities appears to be linked to the activity.

CORA permit data from the 2004-2005 permit year was utilized as the survey was completed in March 2005. It is further noted that CORA operators may hold permits for more than one (1) activity at a beach park. For example, in 2004, there were 55 CORA permits issued at Makena Landing Beach Park, making it the most “popular” beach park with CORA operators. However, a majority of the CORA permits that were issued for Makena Landing were for scuba (18), kayaking (14) and snorkeling (12). Also notable, in 2004, there were 20 CORA permits issued at Kamehameha Iki Park. Of the 20 permits, 13 of the permits were for surfing. There are examples however, of parks based on permit data, where a variety of CORA activities occur. Multiple CORA activities typically occur at the larger parks, such as Kanaha, where ample space is available.

Facilities are another important part of CORA use, however, it appears from the survey responses that limitations on park infrastructure is not a constraint for CORA utilization. The restrooms, showers and parking lot facilities were the most utilized facilities according to respondents.

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The majority of the CORA operators who responded to the survey would like to expand their operations in the next five (5) to ten (10) years. Most responded that they would like to increase the activities that they currently offer. Additionally, respondents were interested in expanding their operations to other County beach parks and would like to increase the number of activities that they offer.

A draft working paper containing the results summary and conclusions from the CORA survey was presented to the CORA operators group at a meeting on June 28, 2005. A summary of the comments received from the CORA operators is provided in Appendix "D" of this report.