



Resident Sentiment Survey - Fall 2022



Prepared for the:
State of Hawai'i, Department of Business,
Economic Development & Tourism: Project #5826
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Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state's economy overall.
- The Resident Sentiment Survey (RSS) has been conducted 20 times since 1999, and the current survey was conducted by Omnitrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai'i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.

Statistical Analysis – Within the reports' graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. islands or attributes) in the same year at the 95% level of confidence.

An arrow ↑ or ↓ indicates a statistically significant difference when ratings are compared across years at the 95% confidence level.

Sample Plan and Methodology

Sample Plan

Omnitrak used a region-based stratified sampling for the study, the same approach used in earlier Resident Sentiment survey efforts conducted by Omnitrak. The sampling plan divided the State into 12 sub-regions with consideration to population proportion, and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionate to population distribution per the latest State Census from the state Department of Business, Economic Development and Tourism.

Statewide sampling produced a total of $n = 1949$ respondents as follows:

- O'ahu: 811
- Hawai'i Island: 451
- Maui County: 397
- Kaua'i: 290

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 33%) and online surveys (67%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: October 19 through December 3, 2022



Key Recommendations & Takeaways

Key Recommendations & Takeaways – State Overall

1 Resident Sentiment towards tourism maintained the positive gains made at the start of 2022: In Fall'22, resident sentiment towards the visitor industry held on to positive momentum that began at the start of the year. Areas such as Tourism offering more benefits than problems and Tourism being better managed remained strong after significant climbs in the Spring of 2022. Noteworthy, gains in sentiment in the important measures of Tourism offering more benefits than problems and the Impact to individuals and their families have made sufficient headway to finally eclipse their levels in 2020.

Improvements were seen throughout the State across Key Tracking indicators of tourism sentiment. Maui County in particular improved significantly while other areas showed slight gains.

Key Resident Sentiment Tracking Statements					
Mean Score	2020	Spring 2021	Fall 2021	Spring 2022	Fall 2022
Tourism has brought more benefits than problems	6.02	5.87	5.67	5.94 ↑	6.05
Perceived impact of tourism on you and your family	6.11	5.91	6.01	6.02	6.21
Tourism is being better managed on my island	NA	5.06	5.06	5.33 ↑	5.44
Tourism should be actively encouraged on my Island	6.13	6.07	5.87	6.10	6.07
<i>My island is run for tourists at expense of local people</i>	6.94	6.78	6.98	6.93	6.92

*Red font indicates questions where higher ratings are worse for Tourism sentiment.

2 Putting the benefits such as \$18 billion in visitor spending and \$2 billion in tax revenues associated with the industry into context, nearly 2-in-3 residents support the industry. Twenty-nine percent of residents strongly agree while 34 percent somewhat agree that the industry is worth the issues associated with it.

3 Support for tourism management strategies continues to surge in areas that perceive the most problems generated by the industry: These strategies are in higher demand on Maui/Kaua'i, areas with lower tourism sentiment compared to O'ahu/Hawai'i Island. This indicates the greater need for solutions from areas where tourism's perceived problems are troubling residents the most.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
Eliminate illegal vacation rentals	7.6	8.0	8.3	8.4
No additional hotel/ condo units	7.2	6.8	7.8	7.9
Charge access fees to state parks/trails	6.9	7.0	7.4	7.6
Encourage visitors to volunteer/give back	7.1	7.3	7.3	7.6

4 Residents aware of the Destination Management Action Plans are generally well informed of actions within the plans: While only between 20-24 percent of residents have heard of DMAP plans, those that are aware were familiar with the plan's initiatives.

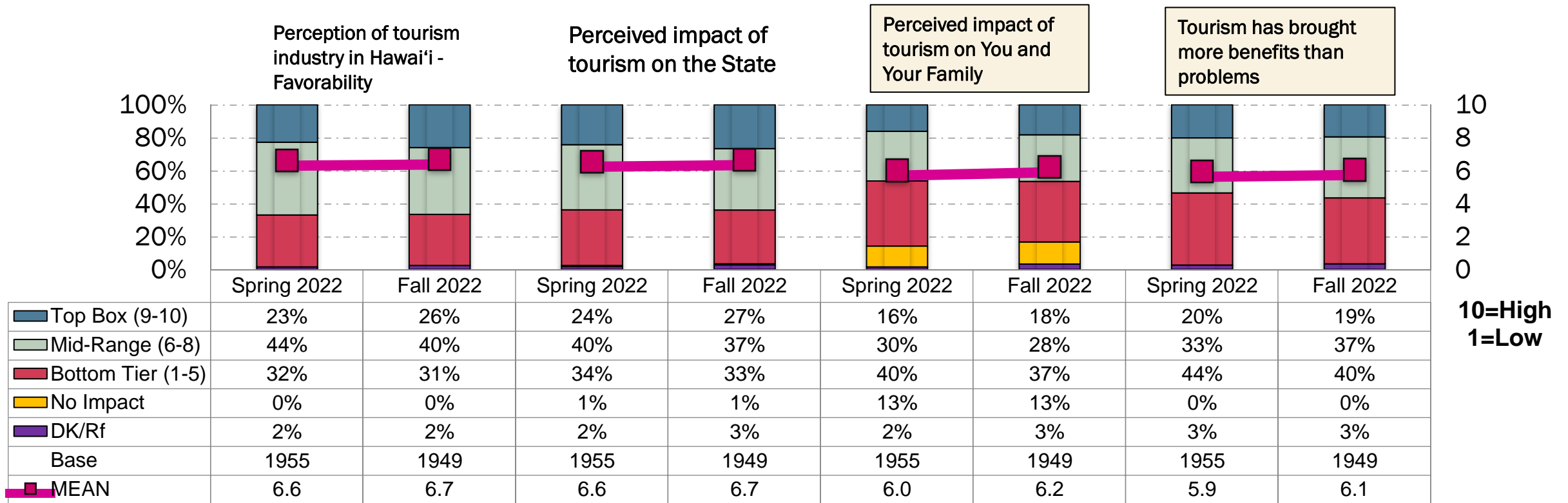
5 Sentiment Drivers: Economic and Quality of Life benefits of tourism are now intertwined with tourism management as the most single most influential driver (82%) in moving resident sentiment. This area includes quality of life benefits, job creation, support for local businesses, festivals/shopping/entertainment, and funding the stewardship of Hawai'i's natural resources, parks and cultural sites.



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

High level key indicators of resident sentiment continued on a positive trajectory with directional improvements in average sentiment. This improvement was driven by lower Bottom Box (1-5) or detractors of the industry.



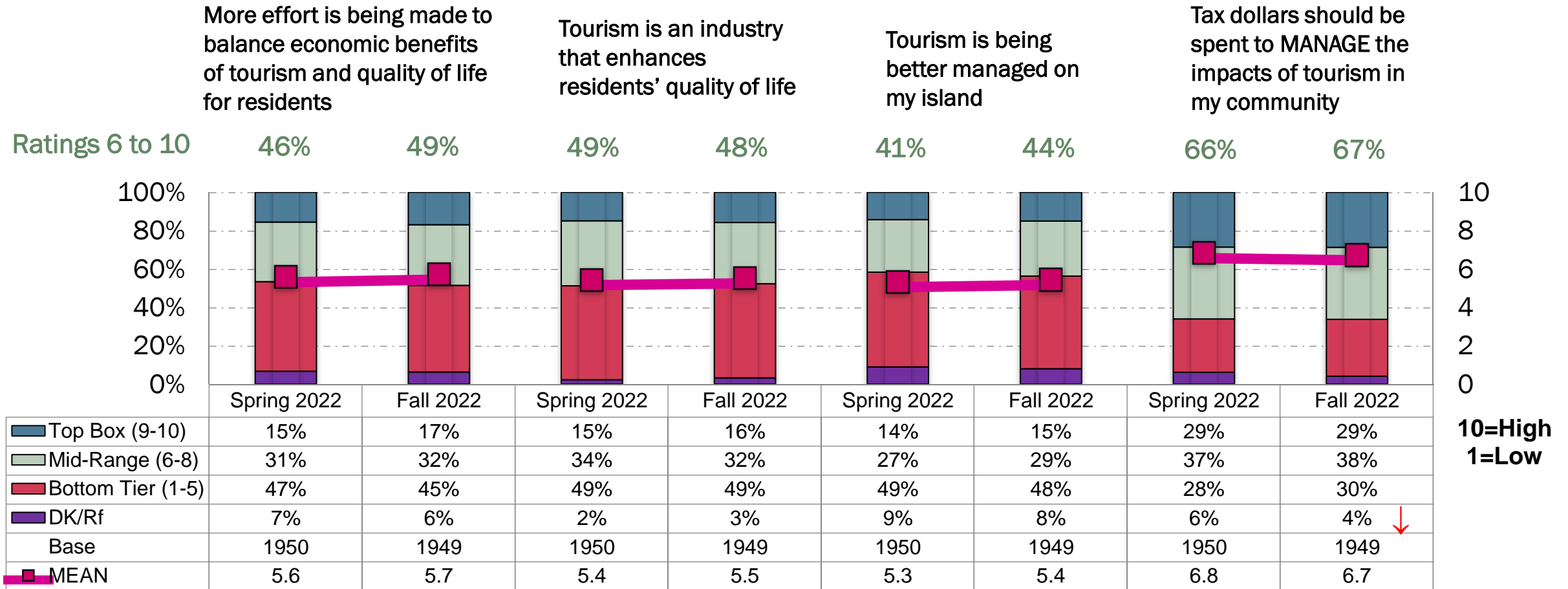
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary - Tourism Management Indicators

Residents' ratings of Tourism Management efforts strengthened on a directional basis, in terms of both positive ratings (i.e., ratings of 6 to 10) and average sentiment scores.



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Executive Summary – Economic Impact Indicators

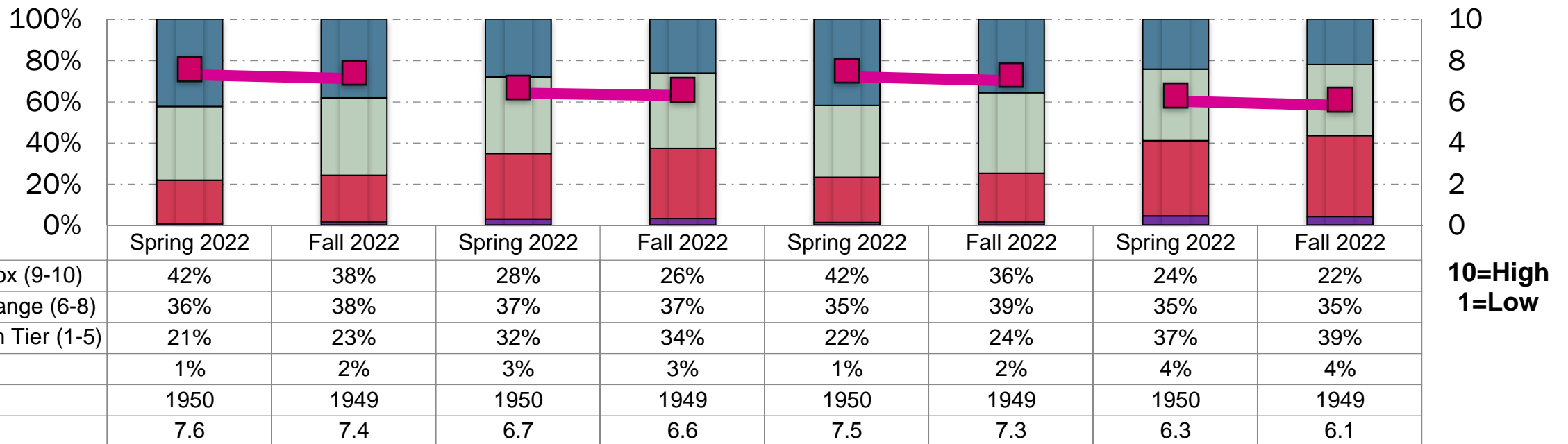
Economic Impact Indicators point to positive perceptions that tourism brings in jobs for residents and that it supports business and industries. Although perceptions have seen some leveling off from highs in Spring 2022, these scores represent an improvement year-on-year from 2021.

Creates job opportunities for residents

Creates job opportunities with paths for advancement

Supports our local businesses like retail, dining, etc.

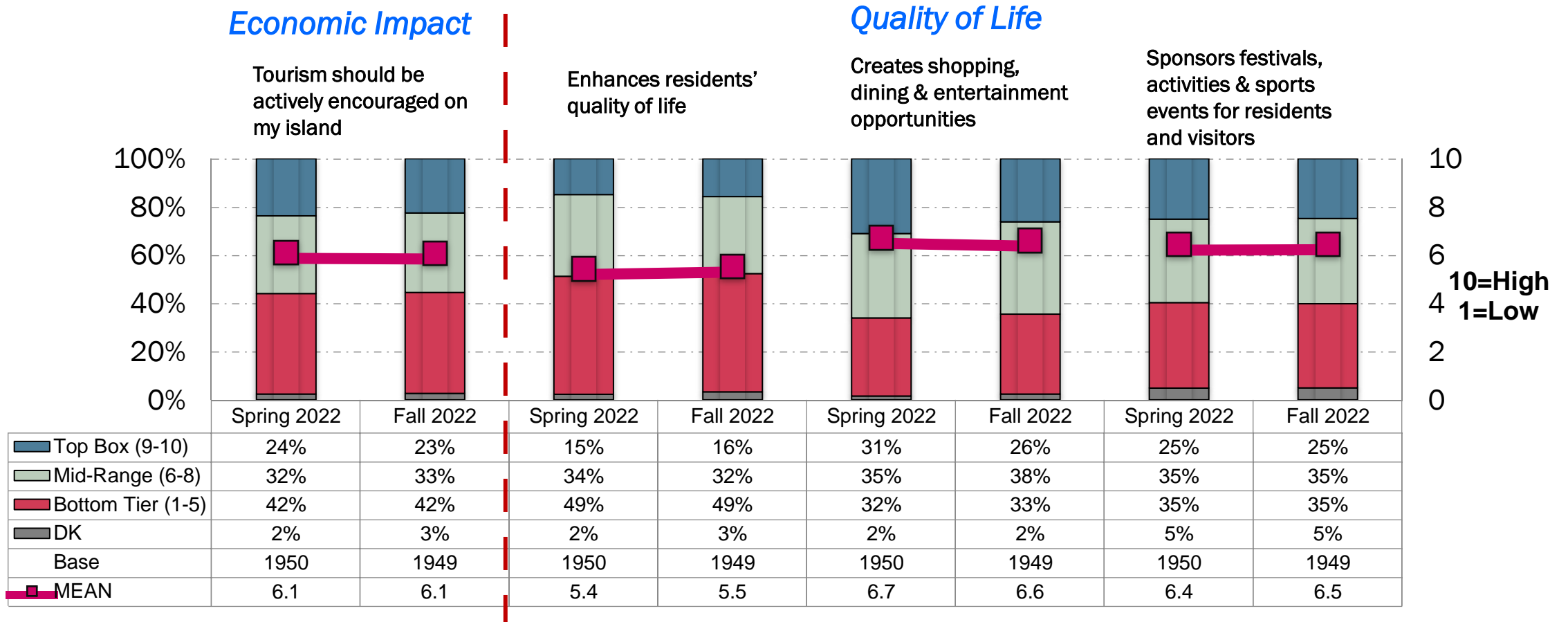
Supports other industries important to residents like agriculture



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Executive Summary – Economic Impact (continued)/Quality of Life

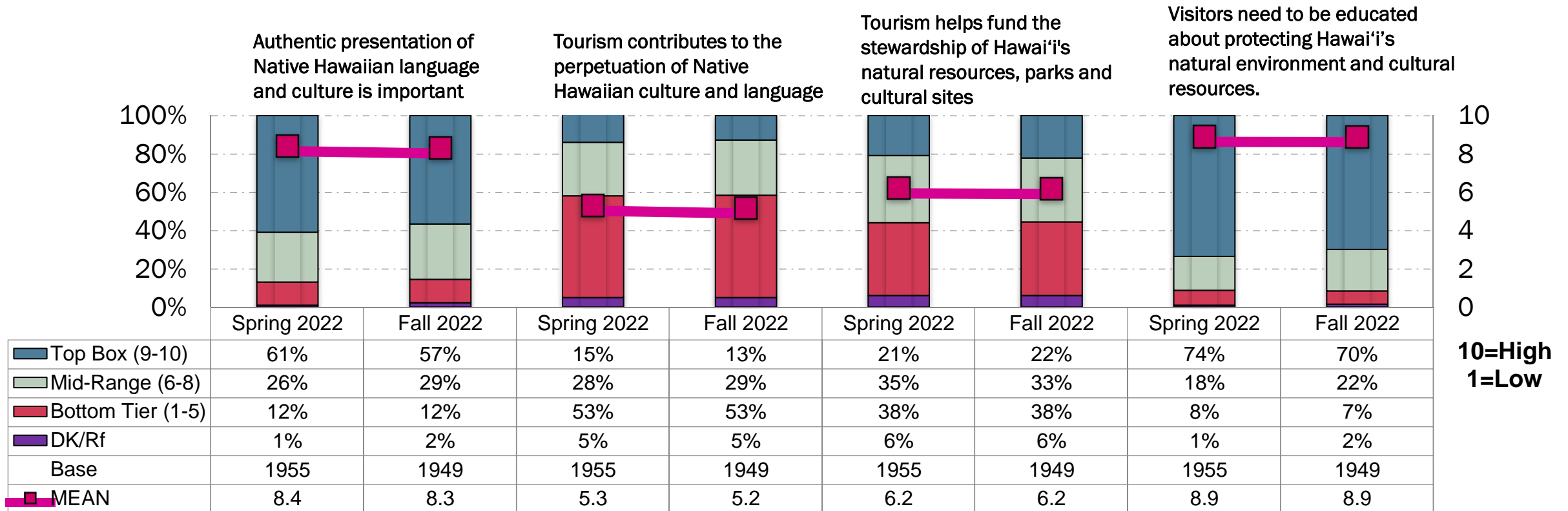
Quality of life measures were stable, as indicators such as *Tourism helps to enhance residents' quality of life, Creates shopping/restaurant/entertainment opportunities, and Sponsors festivals/events* were at similar levels as seen in Spring '22.



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Executive Summary – Native Hawaiian Cultural & Sustainability Indicators

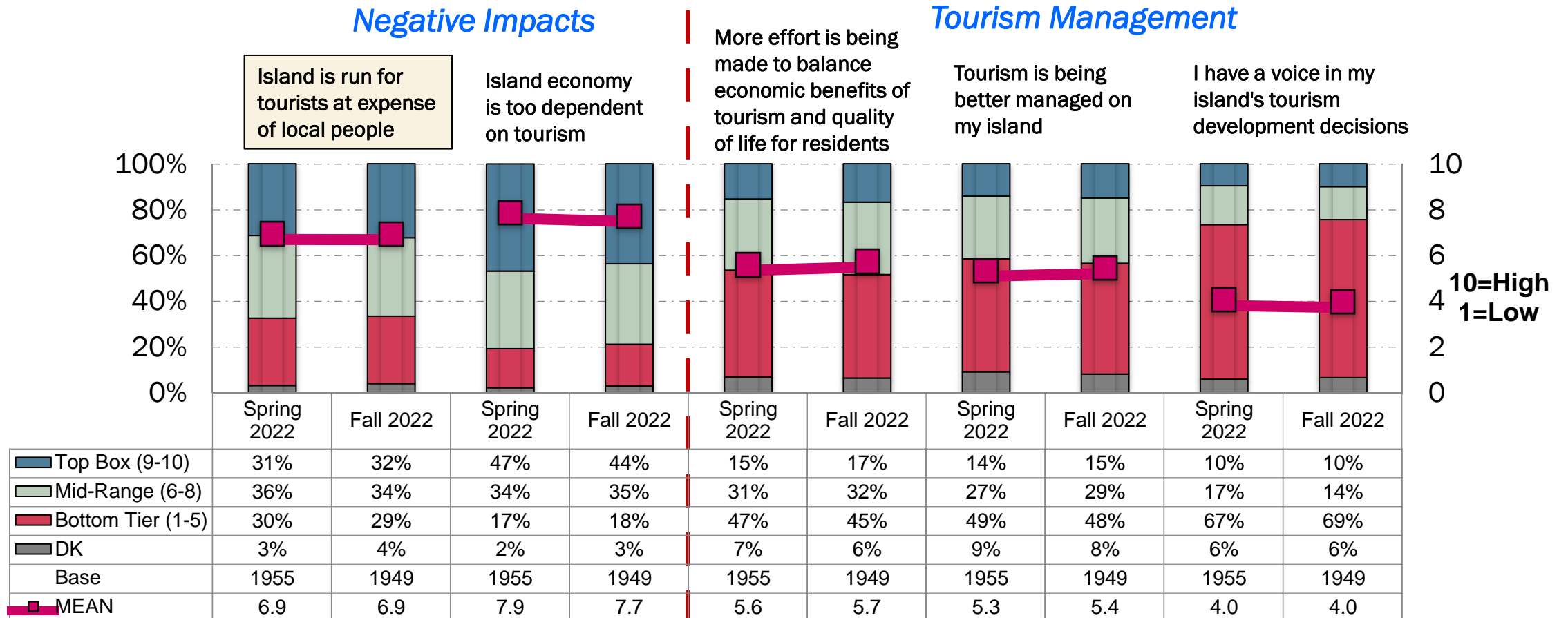
Residents strongly agree that the *Authentic presentation of the Native Hawaiian language and culture* is important (a majority, 57% reported Top Box (9-10) support for this) and that *Visitors need to be educated about protecting Hawai'i's natural environment and cultural resources* (70%). On the other hand, residents were essentially neutral in their assessment that *Tourism contributes to Native Hawaiian culture* (47% Agree/Don't know, 53% Disagree) and were only slightly positive that *Tourism helps to fund stewardship of Hawai'i's resources*.



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Executive Summary – Balance: Negative Impacts/Managed Tourism

Although residents were upbeat on Economic indicators, this did not translate into mitigating some of the negative impacts of the industry – sentiment was largely unchanged in opinions that their *Island is being run for tourists* or that they are *Too dependent on the industry*. On a positive note, resident perceptions regarding managed tourism improved directionally on the effort being made to *Balance the economic benefits with quality of life impact on residents* and that the industry is being better managed overall. The one area of tourism management where the ratings remain challenged was in that *Residents do not feel they have a voice in tourism matters*.



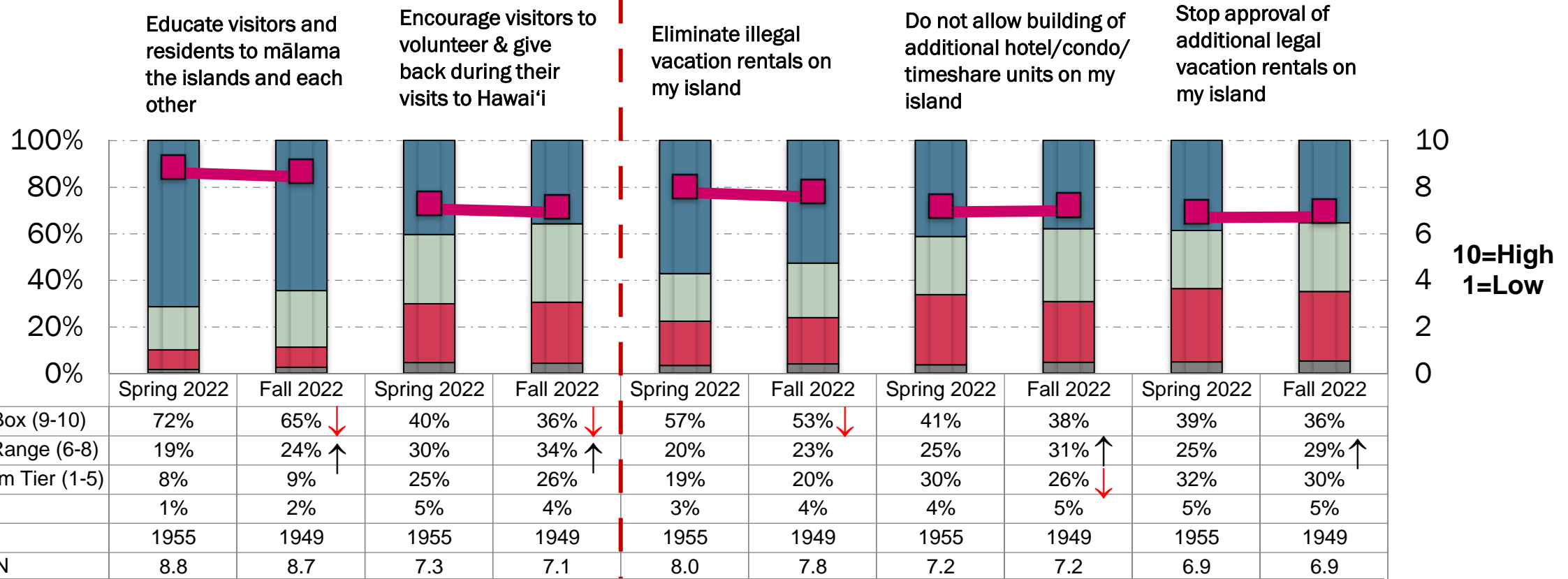
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Executive Summary - Importance of Select Managed Tourism Strategies

Tourism management strategies offer a solution to some of the perceived negative effects of the industry. Public support for areas in Regeneration (educating/encouraging visitors to volunteer) and improving Accommodations strategies (better management of rentals, accommodations) however, remained flat with little movement on this matter from Spring'22.

Regenerative

Accommodations

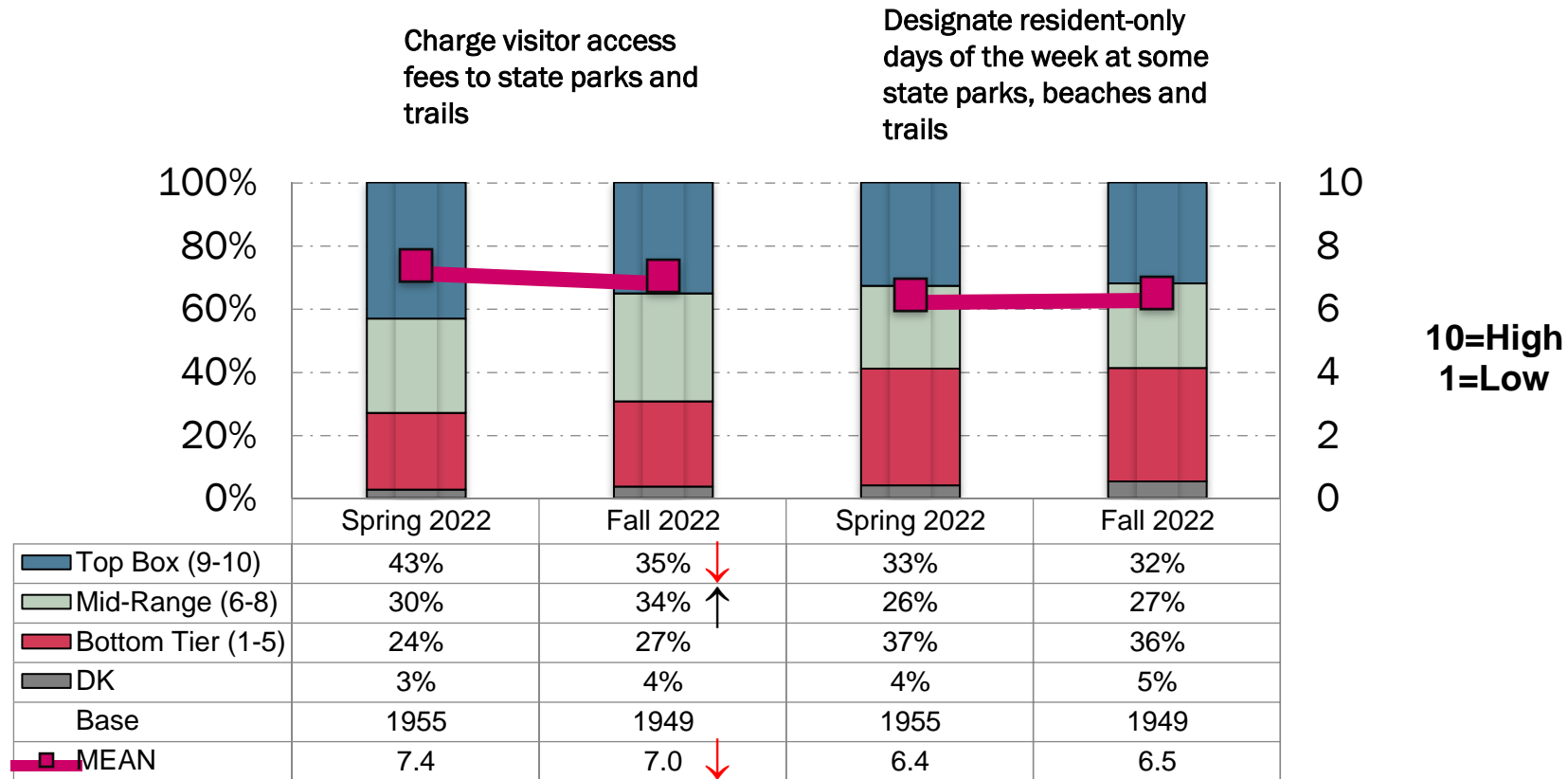


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Executive Summary - Importance of Select Managed Tourism Strategies (continued)

Opinions that the State should charge fees to visitors to access State parks and trails dipped but remained a favored option among residents, along with designating resident only days to access sites.

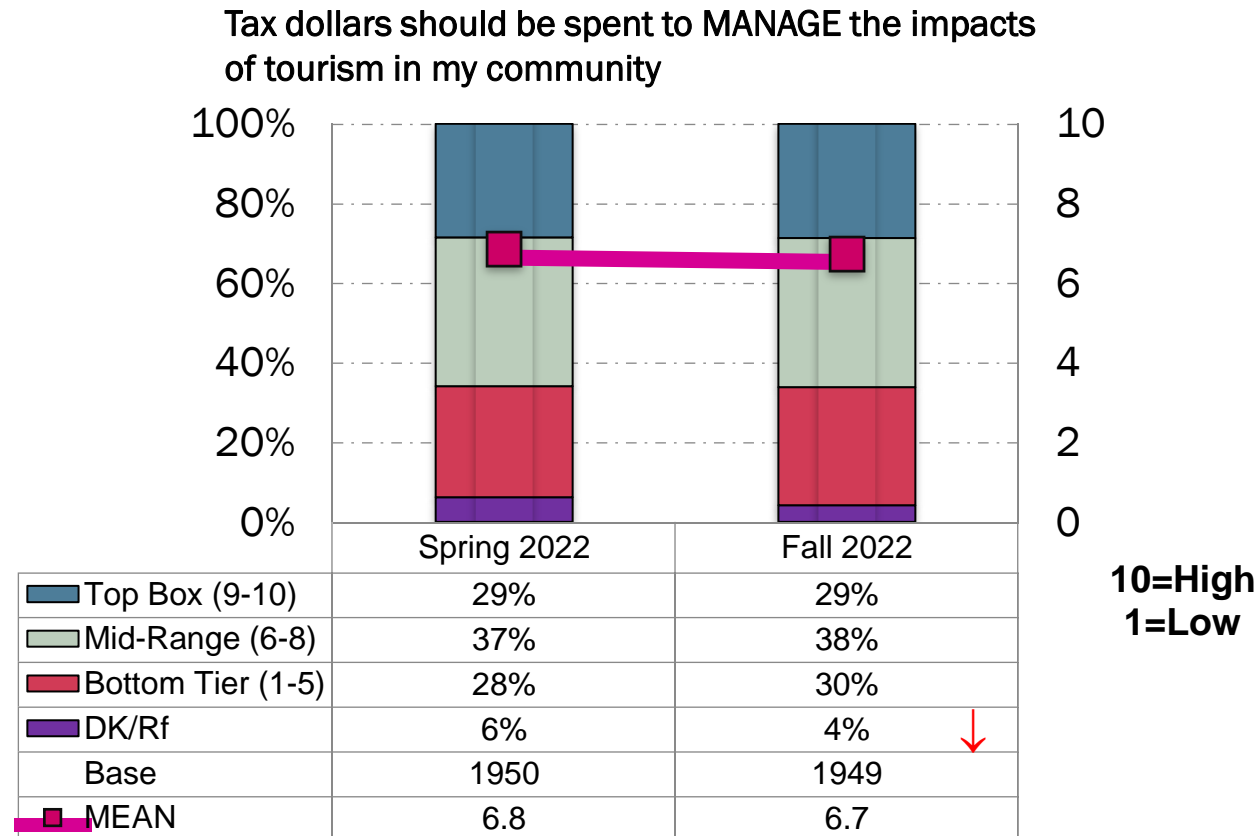
Access



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Executive Summary – Taxes should be spent to Manage Tourism

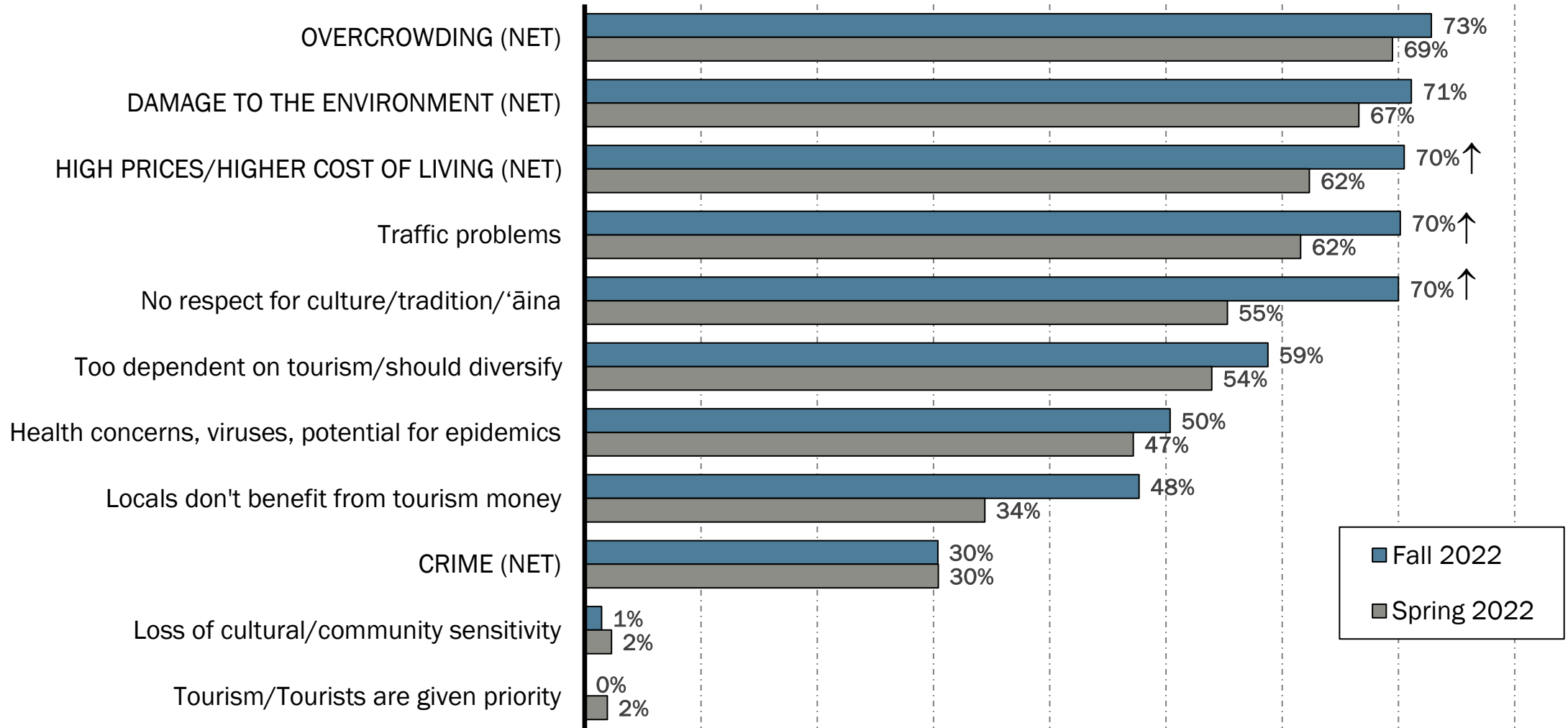
Public support for using tax revenues to fund Tourism management, specifically to manage the impacts of tourism on residents' communities, continued to lean favorably with 67 percent strongly or somewhat agreeable to this idea compared to 30 percent opposed.



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Problems Created by Tourism in Hawai'i (Trends Spring-Fall 2022)

(According to residents saying Hawai'i tourism creates more **problems** than benefits)

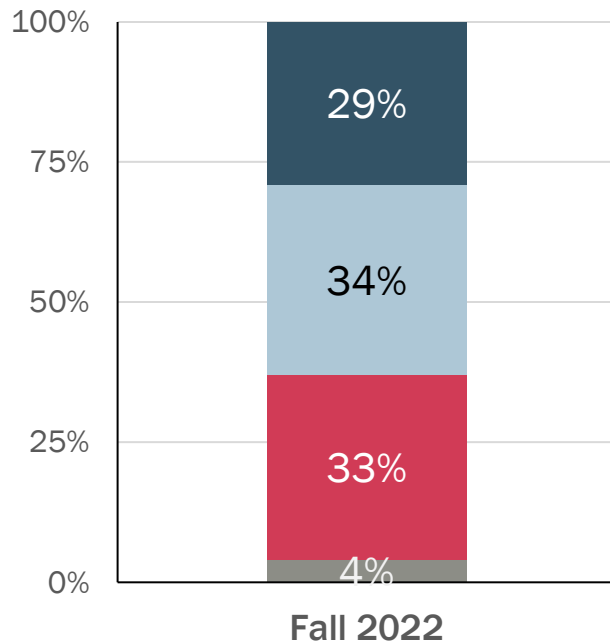


Base: Spring 2022 (856), Fall 2022 (871)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Executive Summary – Tourism worth the issues and management strategies

Stronger sentiment that tourism is worth the issues aligns with greater support for tourism management strategies such as educating and encouraging visitors to give back, while those who say it is not worth the issues are more likely to support management strategies such as eliminating illegal rentals and stopping the building of additional visitor units. This suggests that these residents are seeing little benefit from the industry and the additional tax revenues are not enough to compensate them for the problems generated.



- Definitely worth issues (9-10)
- Somewhat worth issues (6-8)
- Not worth issues (1-5)
- Don't know

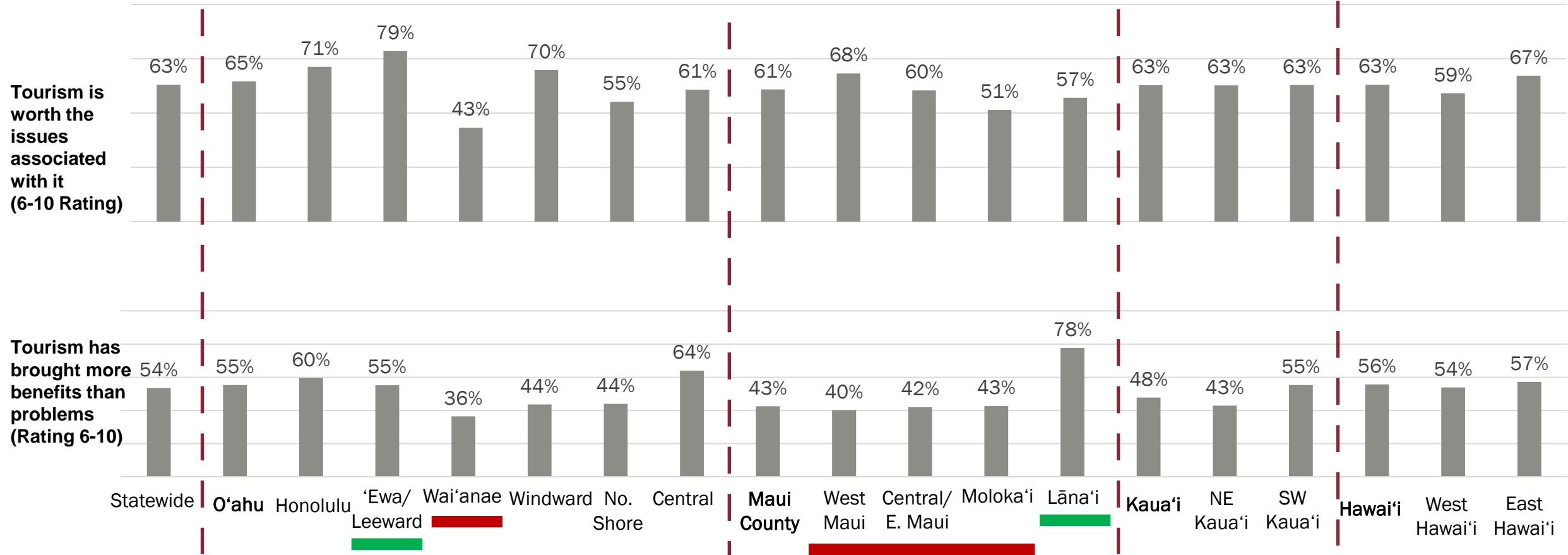
Mean Score	Strongly Agree worth issues (9-10)	Somewhat Agree worth issues (6-8)	Not worth issues (1-5)
<i>Eliminate illegal vacation rentals on my island</i>	8.0	7.3	7.9
<i>Stop approval of additional legal vacation rentals on my island</i>	7.0	6.4	7.5
<i>Do not allow building of additional hotel/condo/timeshare units</i>	7.3	6.7	7.9
<i>Charge visitor fees to access public parks and trails</i>	7.2	6.9	7.1
<i>Designate resident-only days</i>	6.1	6.6	6.6
<i>Educate visitors and residents to mālama the islands</i>	9.1	8.6	8.3
<i>Encourage visitors to volunteer and give back</i>	7.9	7.2	6.8

Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating

Executive Summary –Tourism is Worth the Issues, Benefits outweigh Problems by Island/Area

At the community level, residents who were particularly critical of tourism and its impact resided in **Wai‘anae** on the island of O‘ahu and on **Maui / Moloka‘i**. Sentiment was stronger among residents of **Lāna‘i** and **‘Ewa/Leeward**.

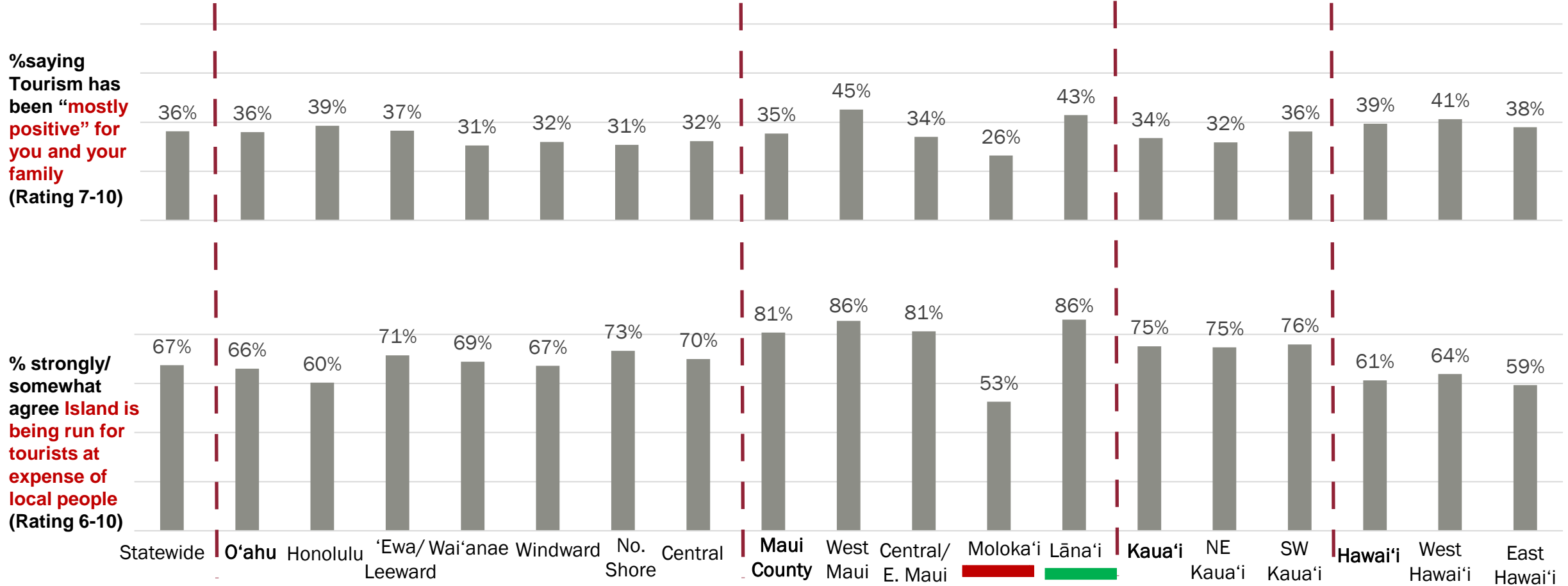


Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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Executive Summary – Resident Sentiment by Island/Area

At the community level, residents of **Moloka‘i** were particularly critical of tourism and its impact on their households, and notably less so among **Lāna‘i** residents. Only 26 percent of Moloka‘i residents say the industry is 'mostly positive' for themselves and their family.

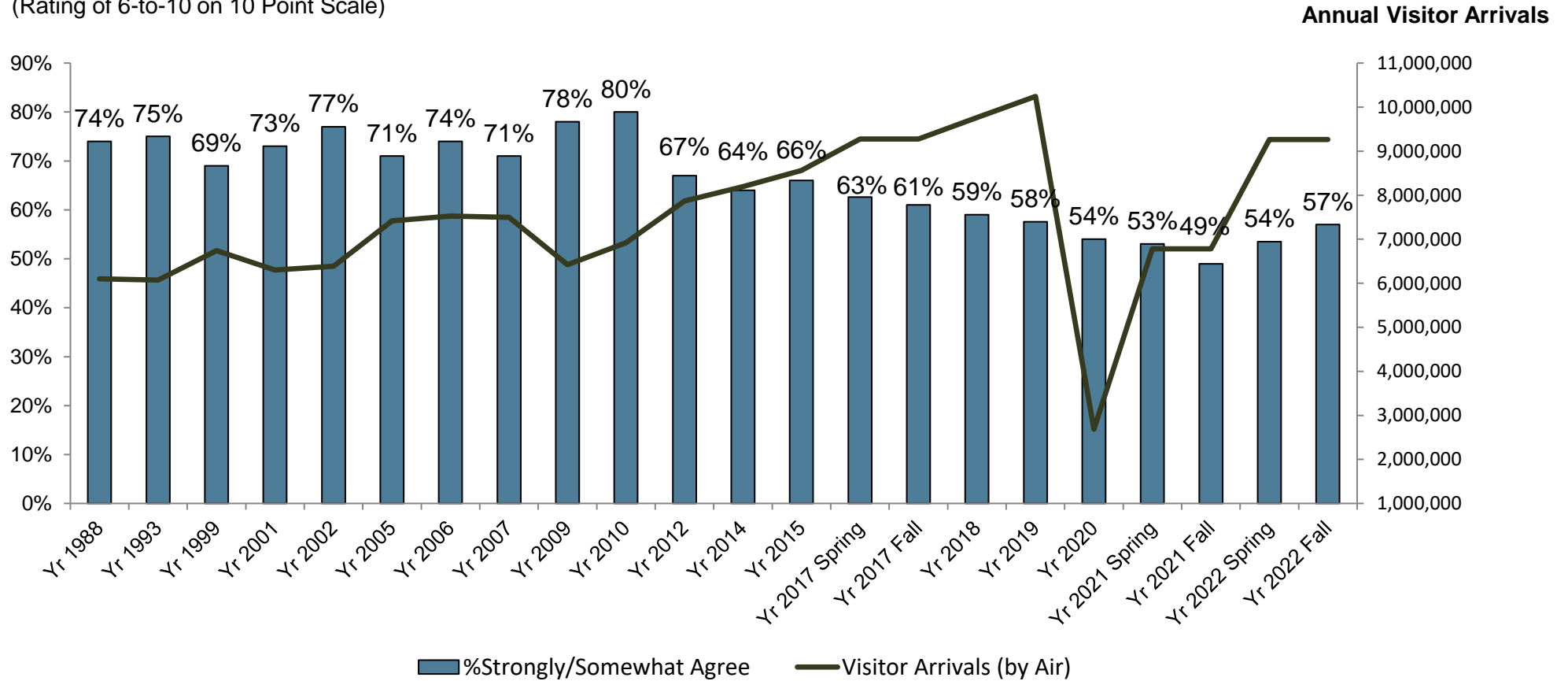


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Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

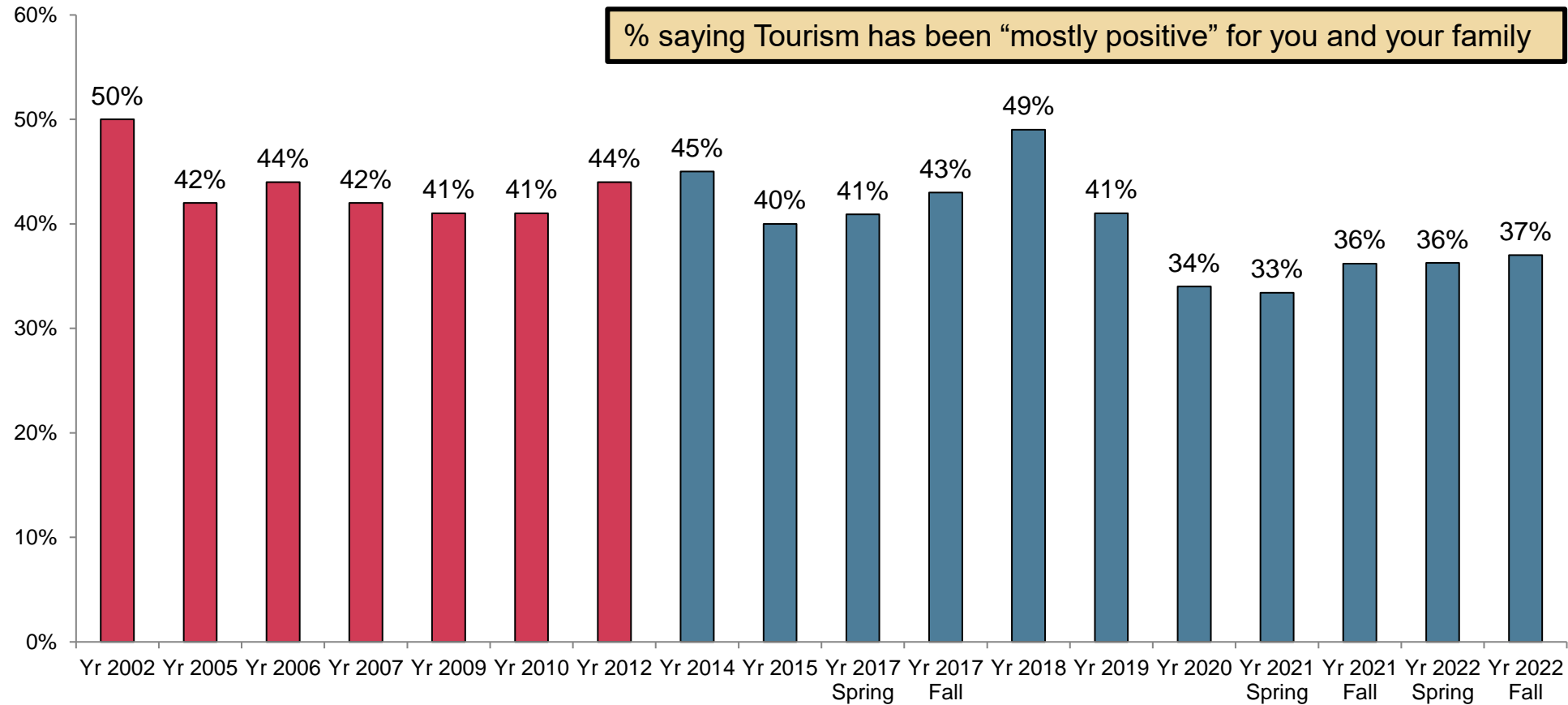
“Tourism has brought more benefits than problems” strengthens

% strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-to-10 on 10 Point Scale)



Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Impact of Tourism on You & Your Family

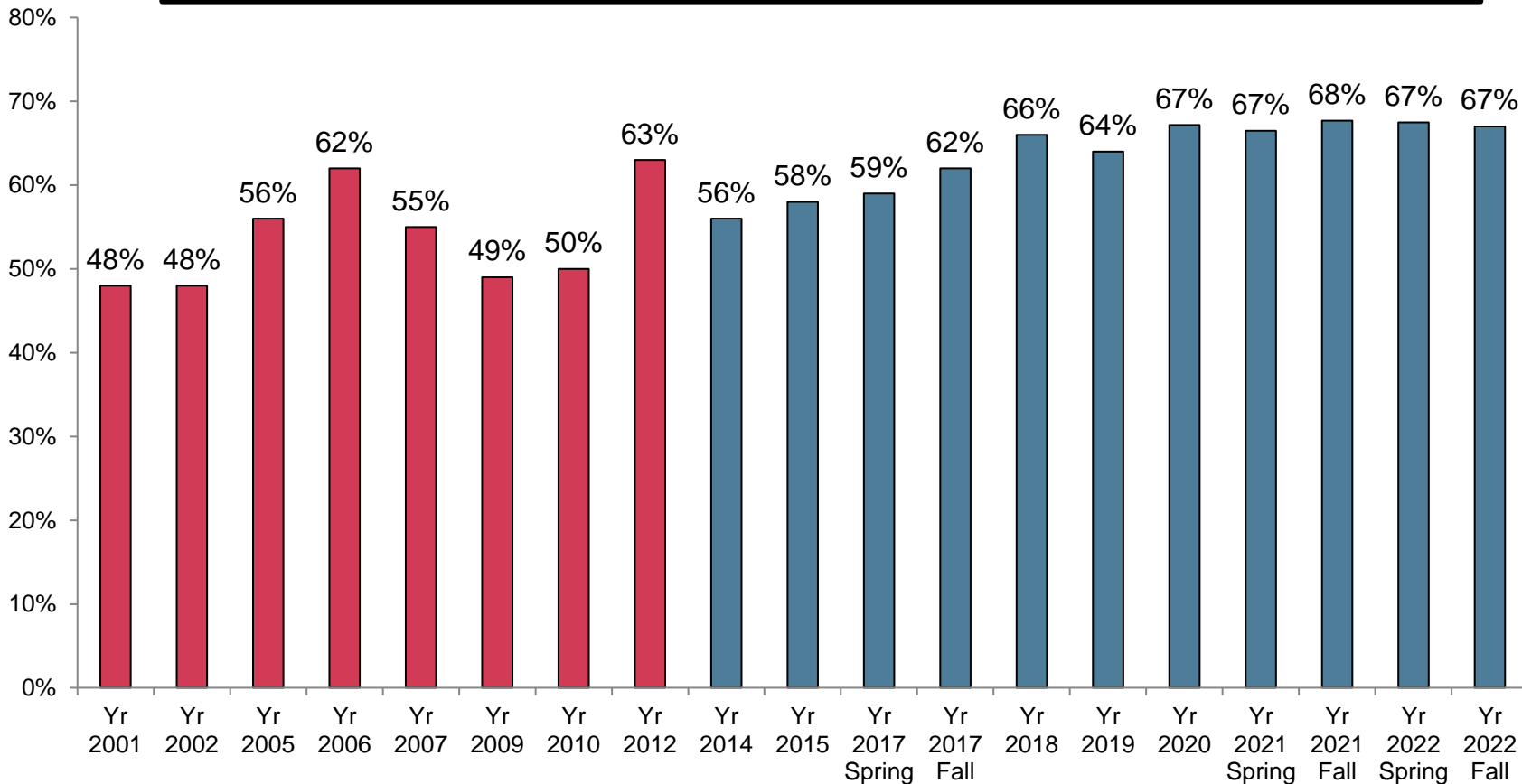


In order to track the data (change in rating scale) from 2009 on a rating of 7-10 was used to approximate the percent that felt positively about this statement.

Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

“This island is being run for tourists at the expense of local people”

% strongly/ somewhat agree island is being run for tourists at expense of local people

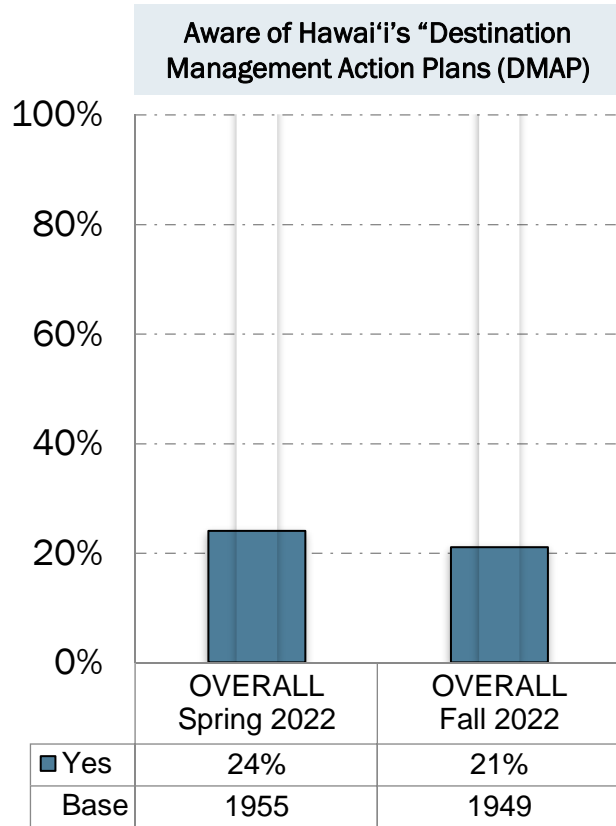


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Executive Summary – Awareness of Managed Tourism Plans

Approximately one-in-five residents (21%) are aware of Hawai'i's Destination Management Action Plans (DMAP) which is a slight dip from Spring 2022, when 24% were aware. Awareness was similar across counties, ranging between 20 and 24 percent.



	Statewide	O'ahu	Hawai'i Island	Maui County	Kaua'i
Aware of Hawai'i's "Destination Management Action Plans (DMAP)	21%	21%	20%	24%	22%

Mean Score	Aware of DMAP	Unaware of DMAP
Tourism has brought more benefits than problems	6.7	5.9
Perceived impact of tourism on you and your family	6.8	6.0
Tourism is being better managed on my island	6.3	5.2
Tourism should be actively encouraged on my Island	6.7	5.9
More effort is being made to balance economic benefits of tourism and quality of life for residents	6.7	5.5
I have a voice in my island's tourism development decisions	5.2	3.6

Awareness of DMAP, does impact tourism sentiment with those aware reporting higher positive sentiment, specifically that tourism is better managed and that more effort is being made to balance the industry's economic benefits with quality of life.

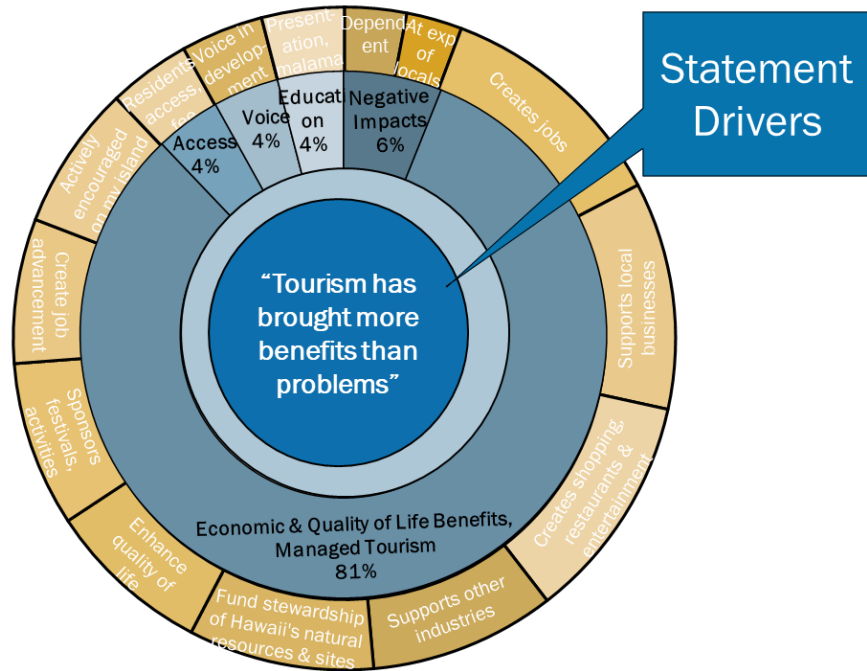
Q9. Have you ever heard of "Destination Management" or "Managed Tourism?"

Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state?

Executive Summary: Drivers of Resident Sentiment

Within the overall drivers of the net benefit of tourism, the specific individual attributes with the most weight are:

- Creates job opportunities for residents: 11%
- Supports local businesses: 10%
- Creates shopping, restaurants and entertainment opportunities for residents: 10%



Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits, Managed Tourism (82%) Spring '22 78% Fall '21 77% Spring '21 79%	Creates job opportunities for residents	11%
	Supports local businesses	10%
	Creates shopping, restaurants and entertainment opportunities for residents	10%
	Supports other industries like agriculture	7%
	Helps fund the stewardship of Hawaii's natural resources, parks and cultural sites	7%
	Is an industry that enhances residents' quality of life	7%
	Sponsors festivals, activities & sports events for residents & visitors	7%
	Creates jobs opportunities with paths for advancement	6%
	Should be actively encouraged on my island	6%
	Contributes to the perpetuation of Native Hawaiian culture and language	4%
	More effort is being made to balance economic benefits of tourism and quality of life for residents	4%
	Tourism is being better managed on my island	3%
Negative Impacts (6%)	My island's economy is too dependent on tourism	3%
	This island is being run for tourists at the expense of local people	3%
	Designate resident-only days of the week at some state parks, beaches and trails	2%
Access (4%)	Charge visitors fees to access public parks and trails	1%
	Encourage visitors to volunteer and give back during their visits to Hawaii	1%
	Encourage visitors to volunteer and give back during their visits to Hawaii	1%
Voice (4%)	I have a voice in my island's tourism development decisions	4%
Education (4%)	Authentic presentation of Native Hawaiian language and culture	2%
	Educate visitors and residents to malama the islands and each other	1%
	Educate visitors about protecting Hawaii's natural environment & cultural resources	1%

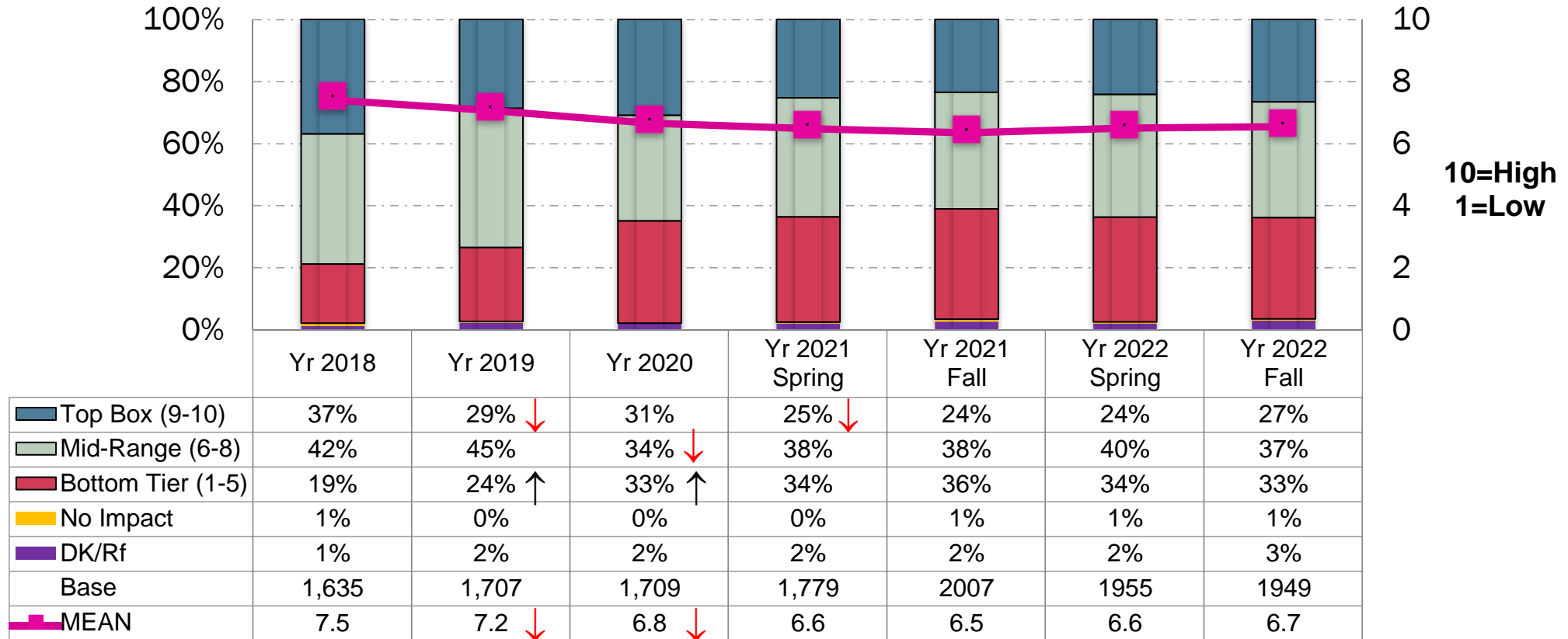


Detailed Findings



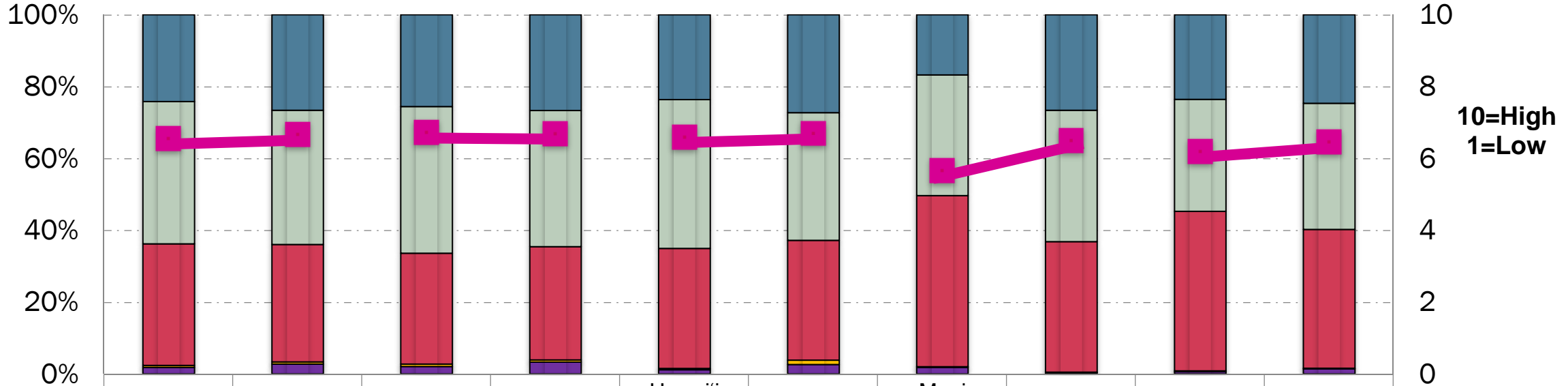
Impact of the Visitor Industry

Impact of Tourism on the State - *Overall*



Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

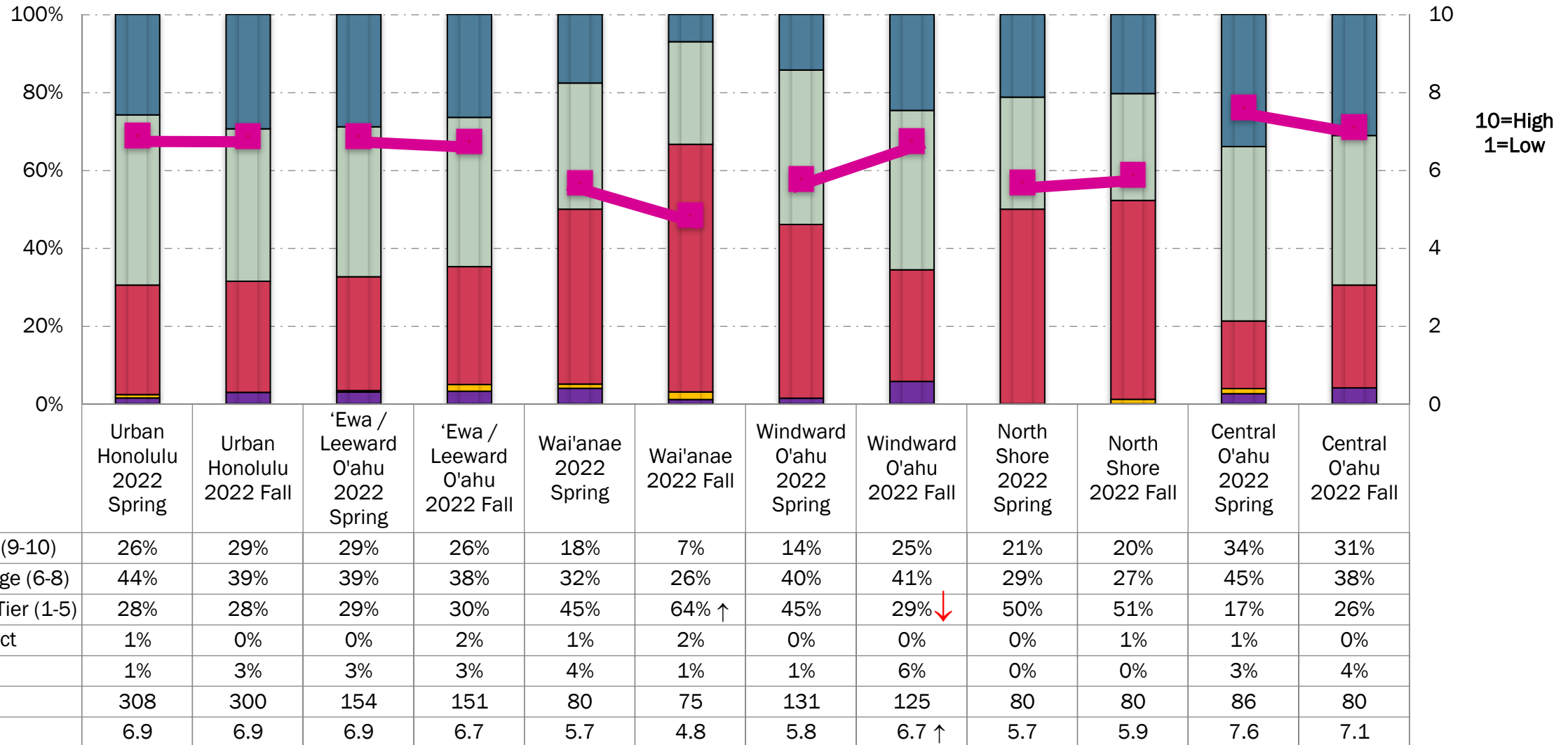
Impact of Tourism on the State – *By County*



	OVERALL 2022 Spring	OVERALL 2022 Fall	O'ahu 2022 Spring	O'ahu 2022 Fall	Hawai'i Island 2022 Spring	Hawai'i Island 2022 Fall	Maui County 2022 Spring	Maui County 2022 Fall	Kaua'i 2022 Spring	Kaua'i 2022 Fall
Top Box (9-10)	24%	27%	26%	27%	24%	27%	17%	27% ↑	24%	25%
Mid-Range (6-8)	40%	37%	41%	38%	41%	36%	34%	37%	31%	35%
Bottom Tier (1-5)	34%	33%	31%	32%	33%	33%	48%	36% ↓	44%	39%
No Impact	1%	1%	1%	1%	0%	1%	0%	0%	0%	0%
DK/Rf	2%	3%	2%	3%	1%	3%	2%	0%	1%	1%
Base	1955	1949	839	811	458	451	403	397	255	290
MEAN	6.6	6.7	6.7	6.7	6.6	6.7	5.7	6.5 ↑	6.2	6.4

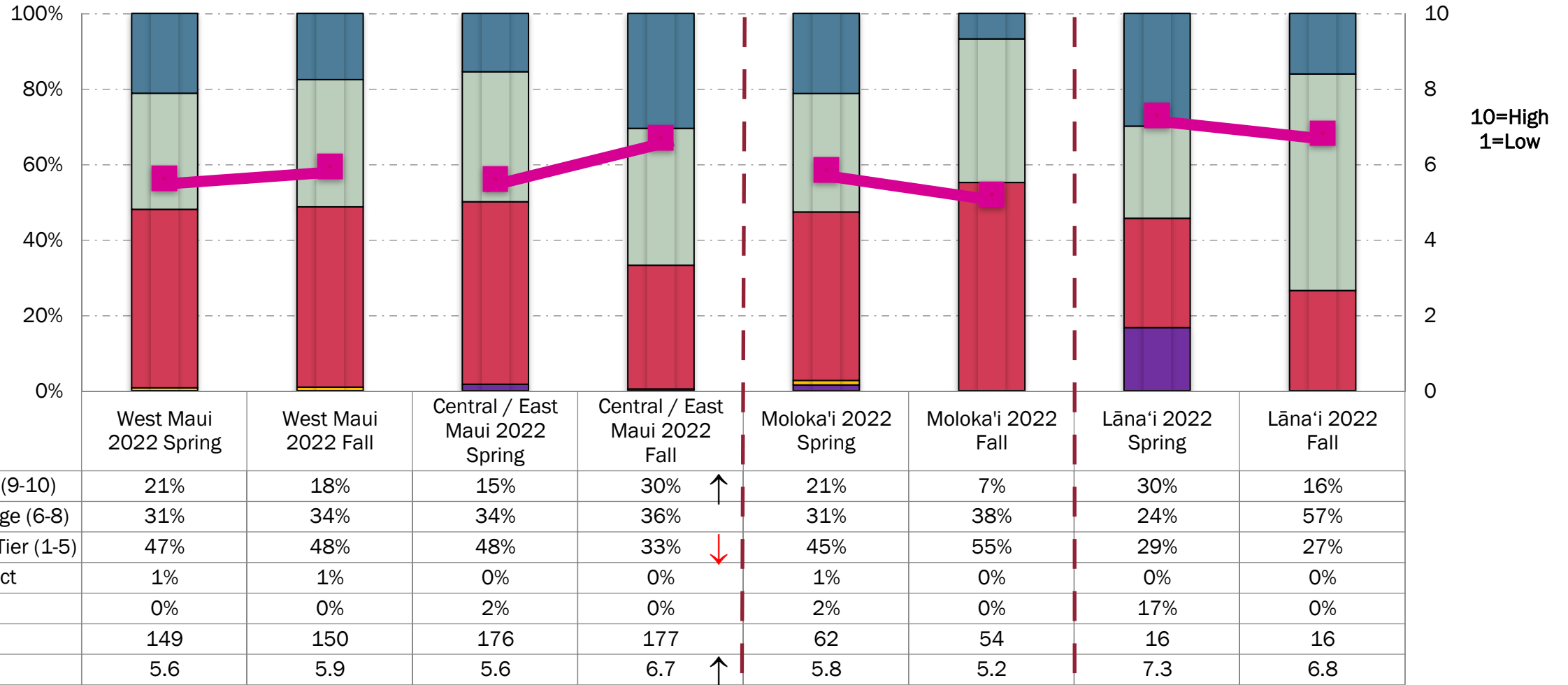
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Area (O'ahu)*



Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Area (Maui County)*



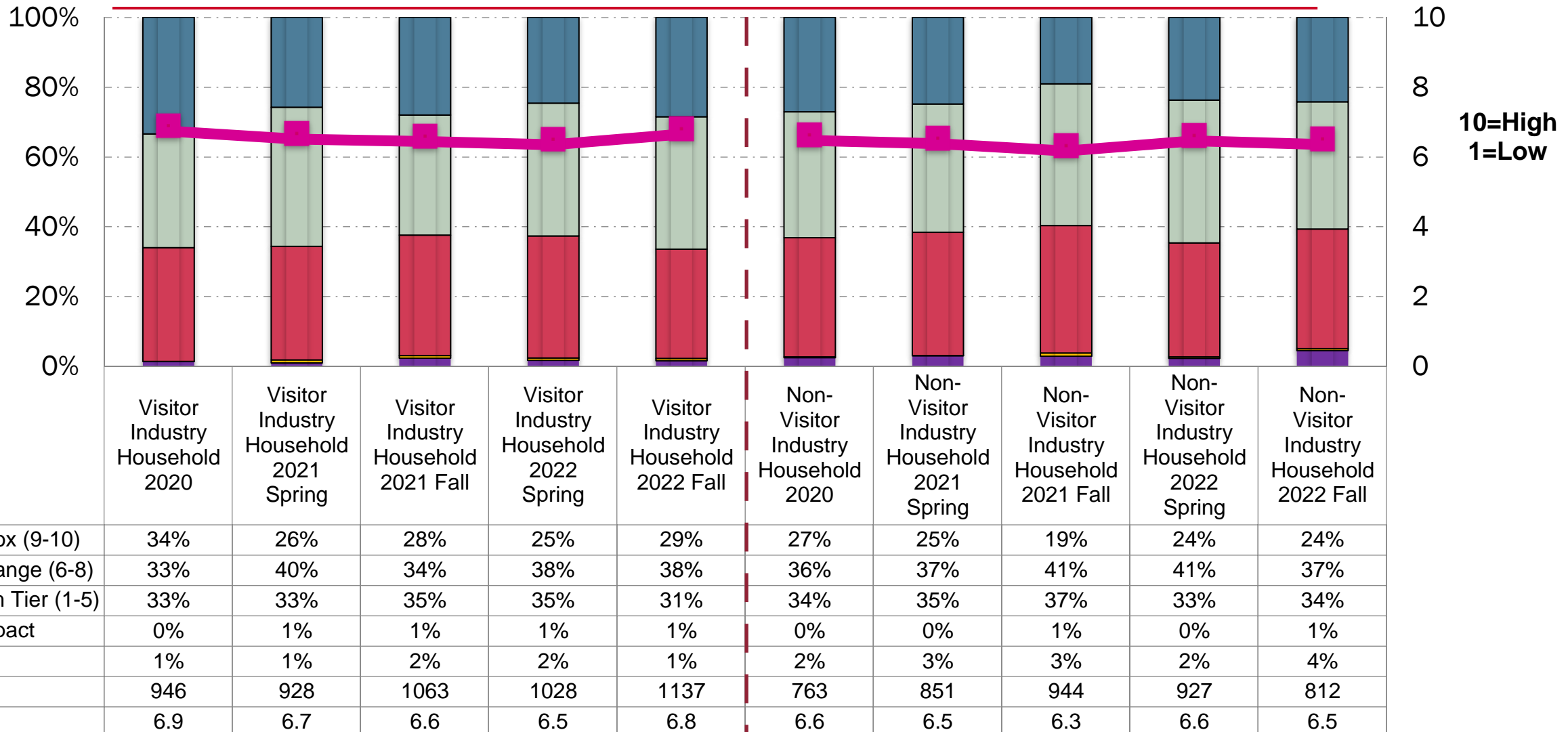
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

Impact of Tourism on the State – *By Area (Hawai'i Island & Kaua'i)*



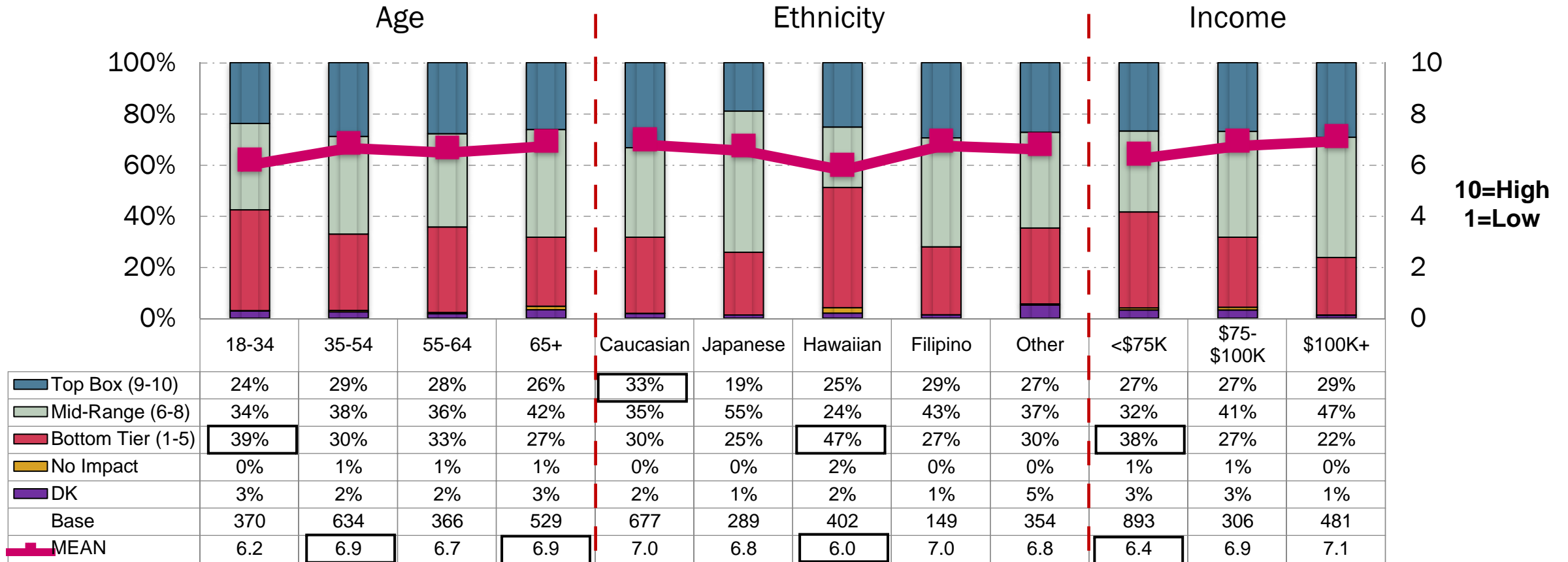
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

Impact of Tourism on the State – Visitor Industry Household vs Non-Visitor Industry Household



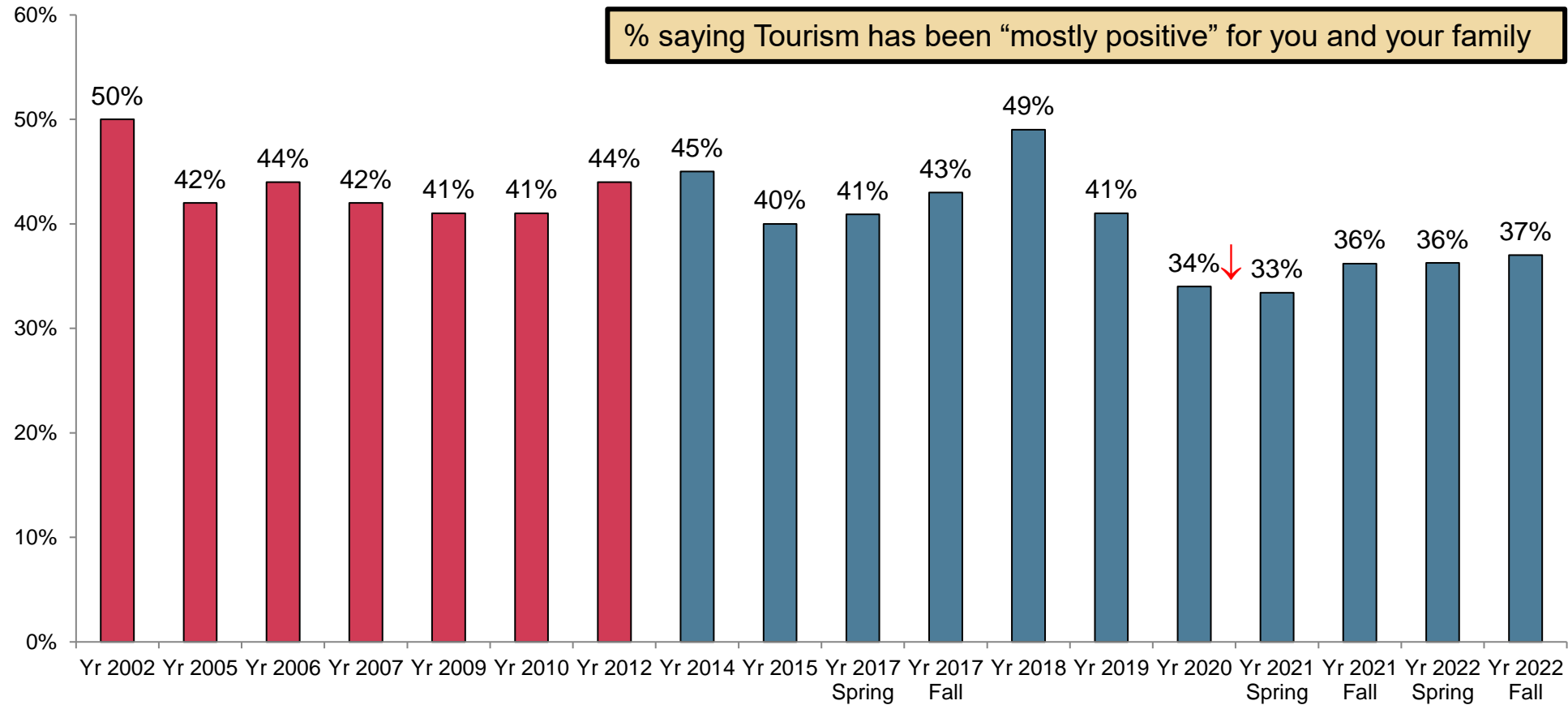
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...the state as a whole? If tourism has no impact, please just tell me.

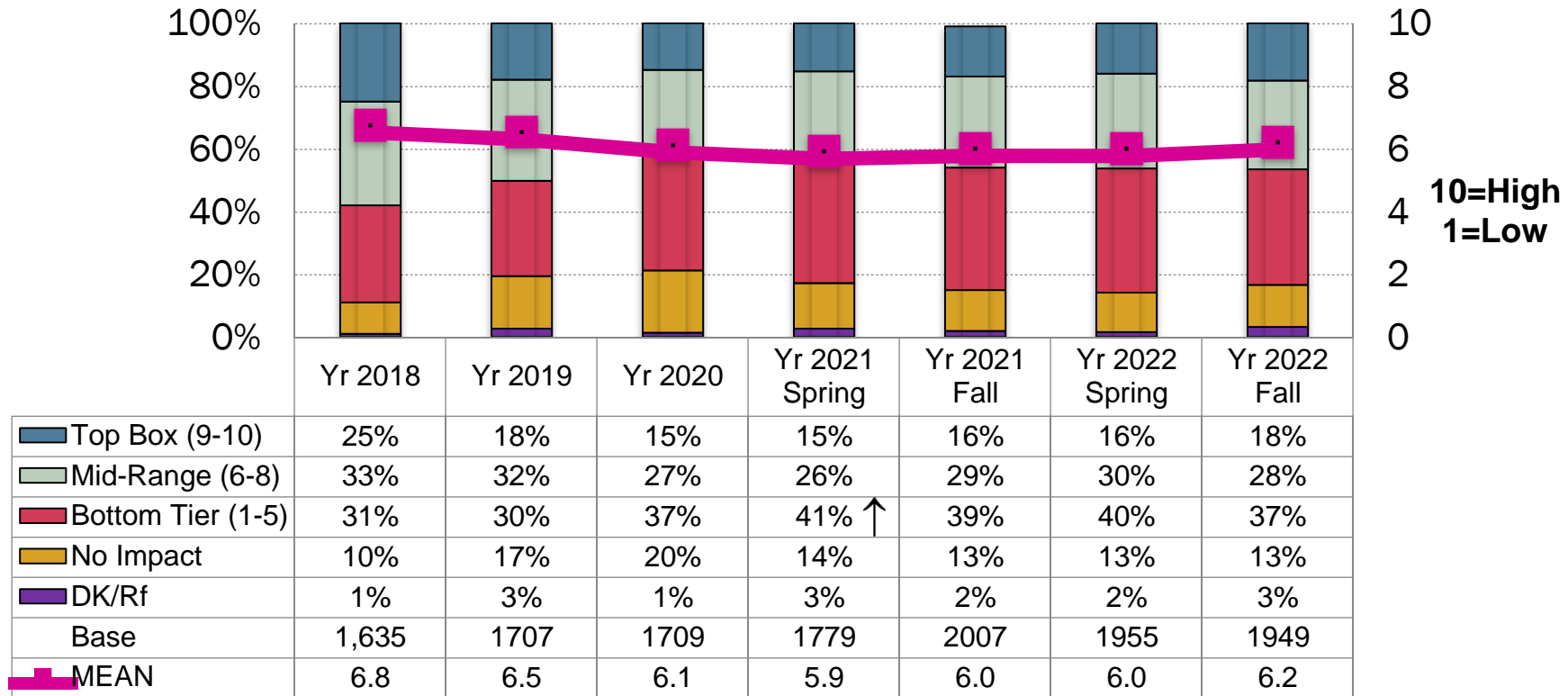
Impact of Tourism on You & Your Family – *Overall Trend*



In order to track the data (change in rating scale) from 2009 on a rating of 7-10 was used to approximate the percent that felt positively about this statement.

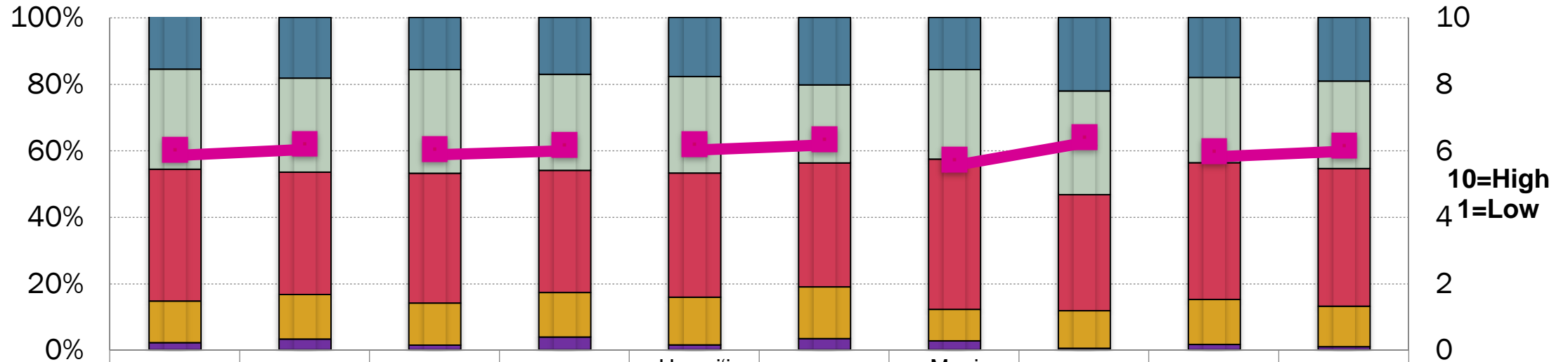
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – Overall



Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

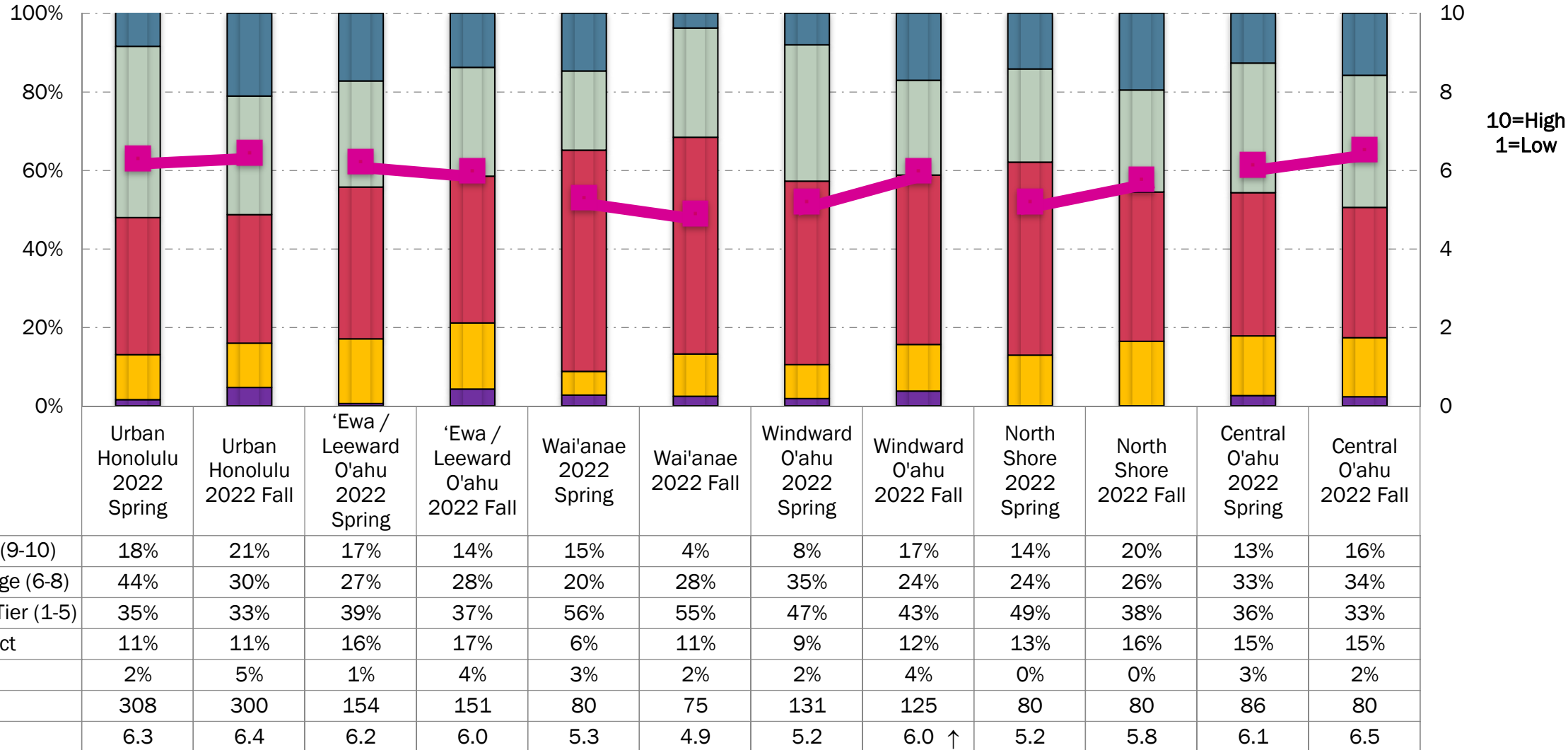
Impact of Tourism on You & Your Family - *By County*



	OVERALL 2022 Spring	OVERALL 2022 Fall	O'ahu 2022 Spring	O'ahu 2022 Fall	Hawai'i Island 2022 Spring	Hawai'i Island 2022 Fall	Maui County 2022 Spring	Maui County 2022 Fall	Kaua'i 2022 Spring	Kaua'i 2022 Fall
Top Box (9-10)	16%	18%	16%	17%	18%	20%	16%	22%	18%	19%
Mid-Range (6-8)	30%	28%	31%	29%	29%	24%	27%	31%	26%	26%
Bottom Tier (1-5)	40%	37%	39%	37%	37%	37%	45%	35% ↓	41%	41%
No Impact	13%	13%	13%	13%	14%	16%	9%	11%	14%	12%
DK/Rf	2%	3%	1%	4%	1%	3%	3%	0%	2%	1%
Base	1955	1949	839	811	458	451	403	397	255	290
MEAN	6.0	6.2	6.0	6.2	6.2	6.3	5.7	6.4 ↑	6.0	6.1

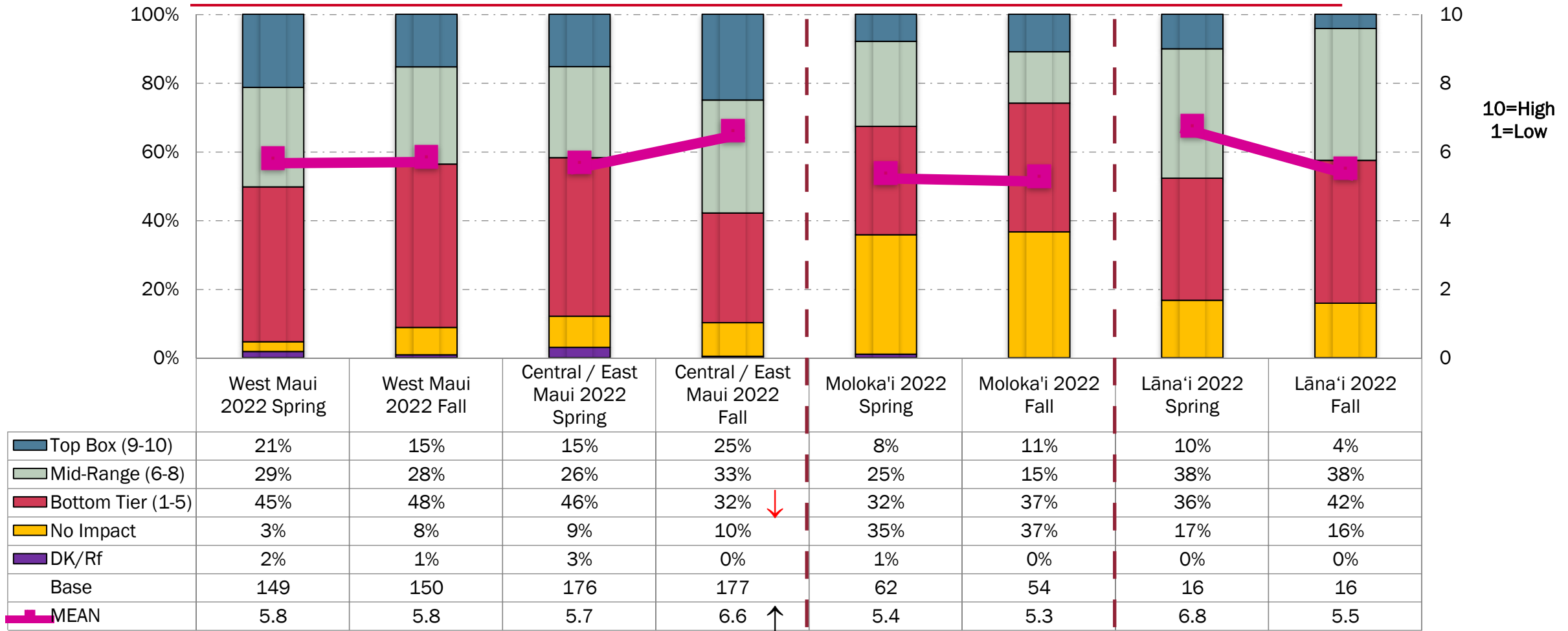
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – *By Area (O'ahu)*



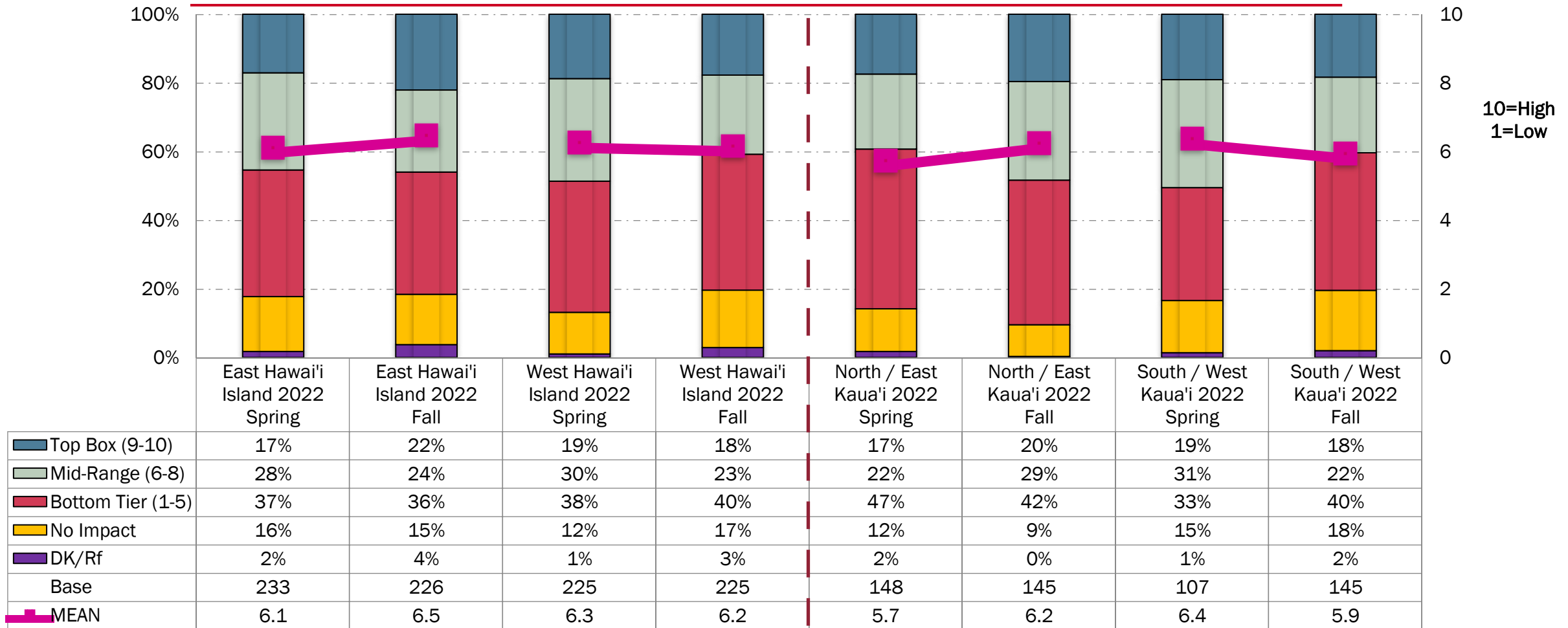
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – *By Area (Maui County)*



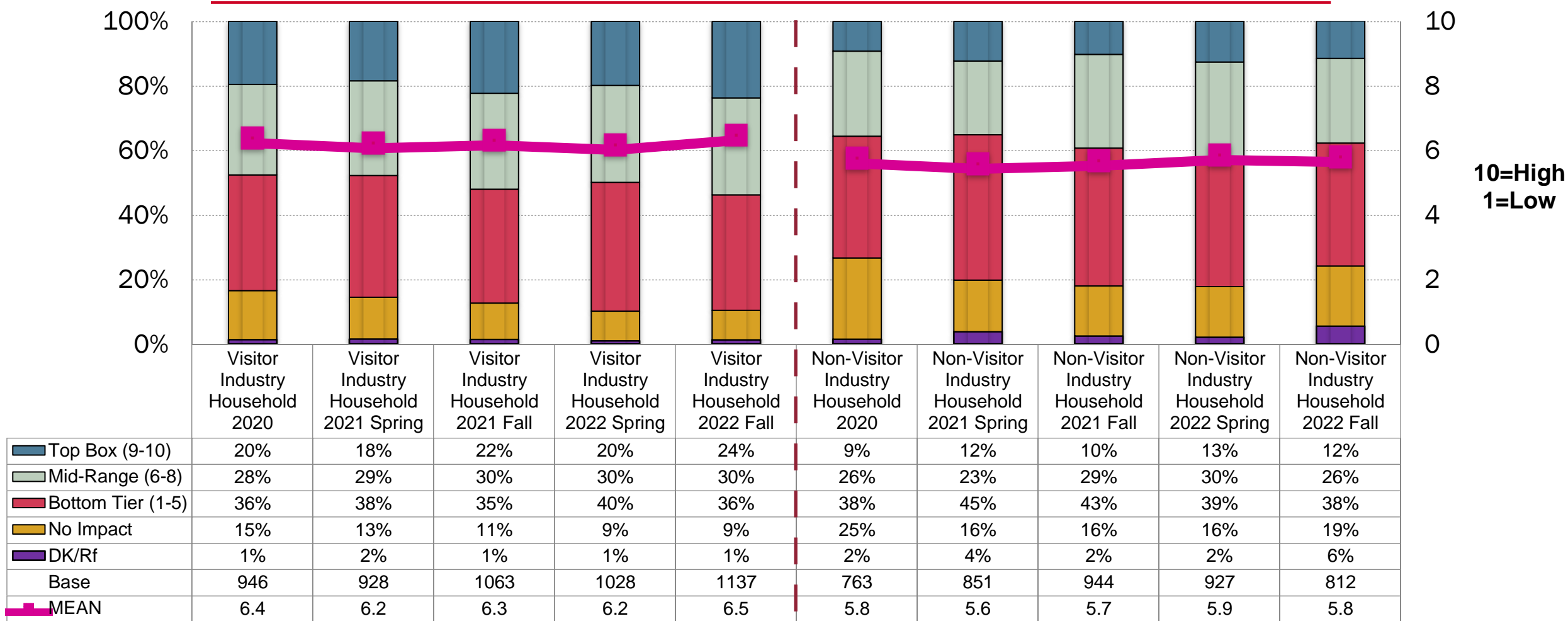
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

Impact of Tourism on You & Your Family – *By Area (Hawai'i Island & Kaua'i)*



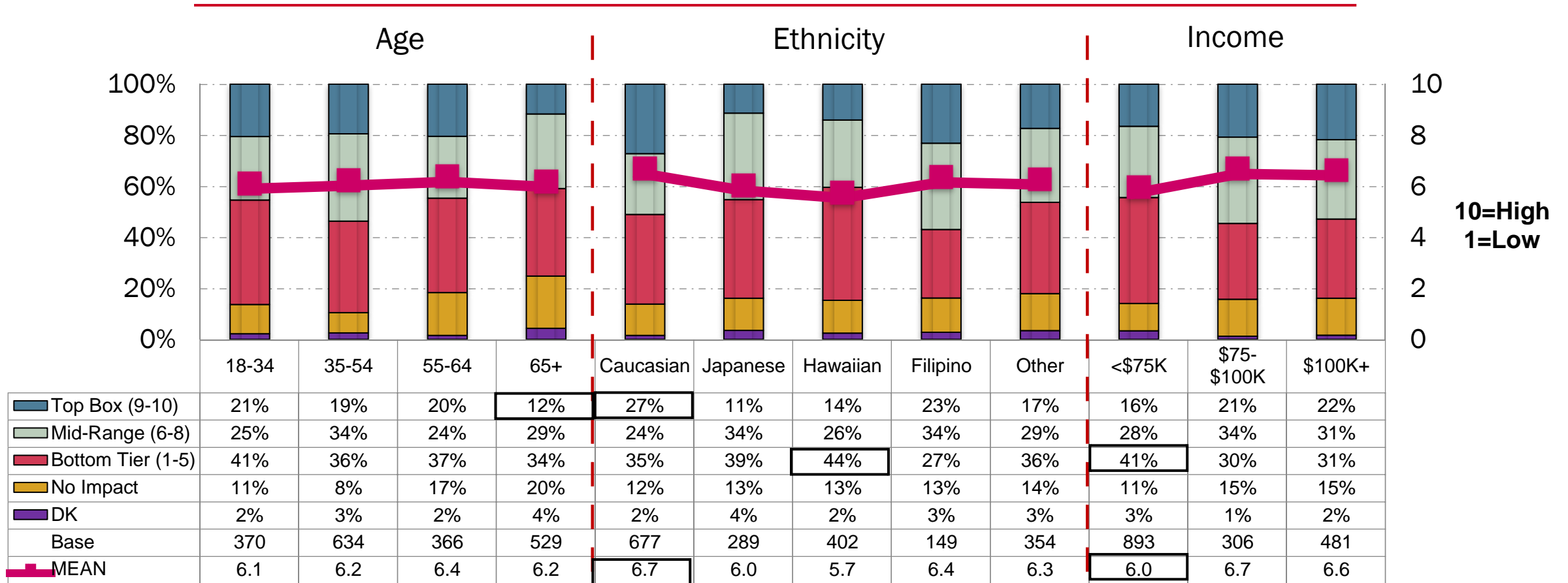
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family? *Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.*

Impact of Tourism on You & Your Family- Visitor Industry Household vs Non-Visitor Industry Household



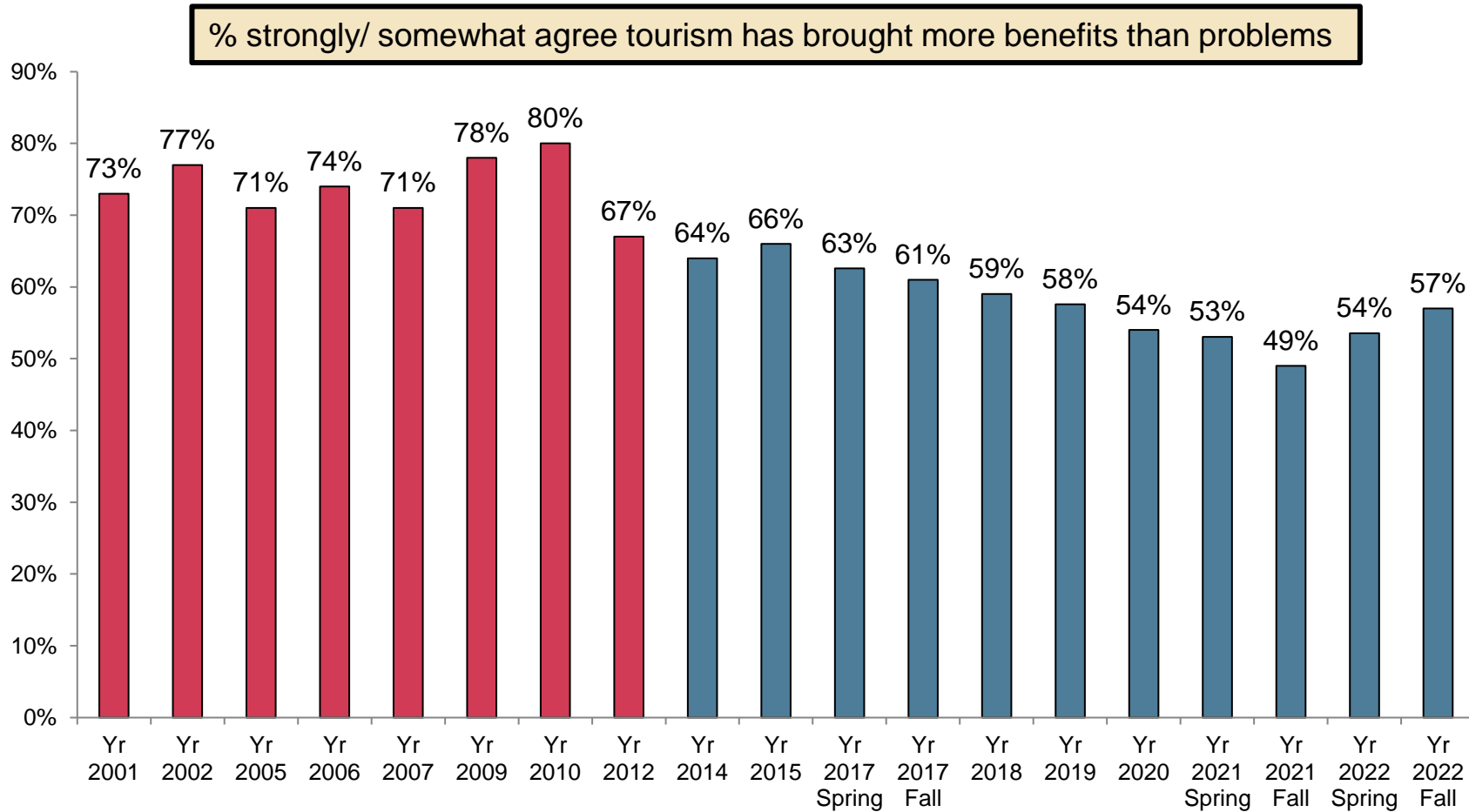
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family - *By Demographics*



Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...you and your family? If tourism has no impact, please just tell me.

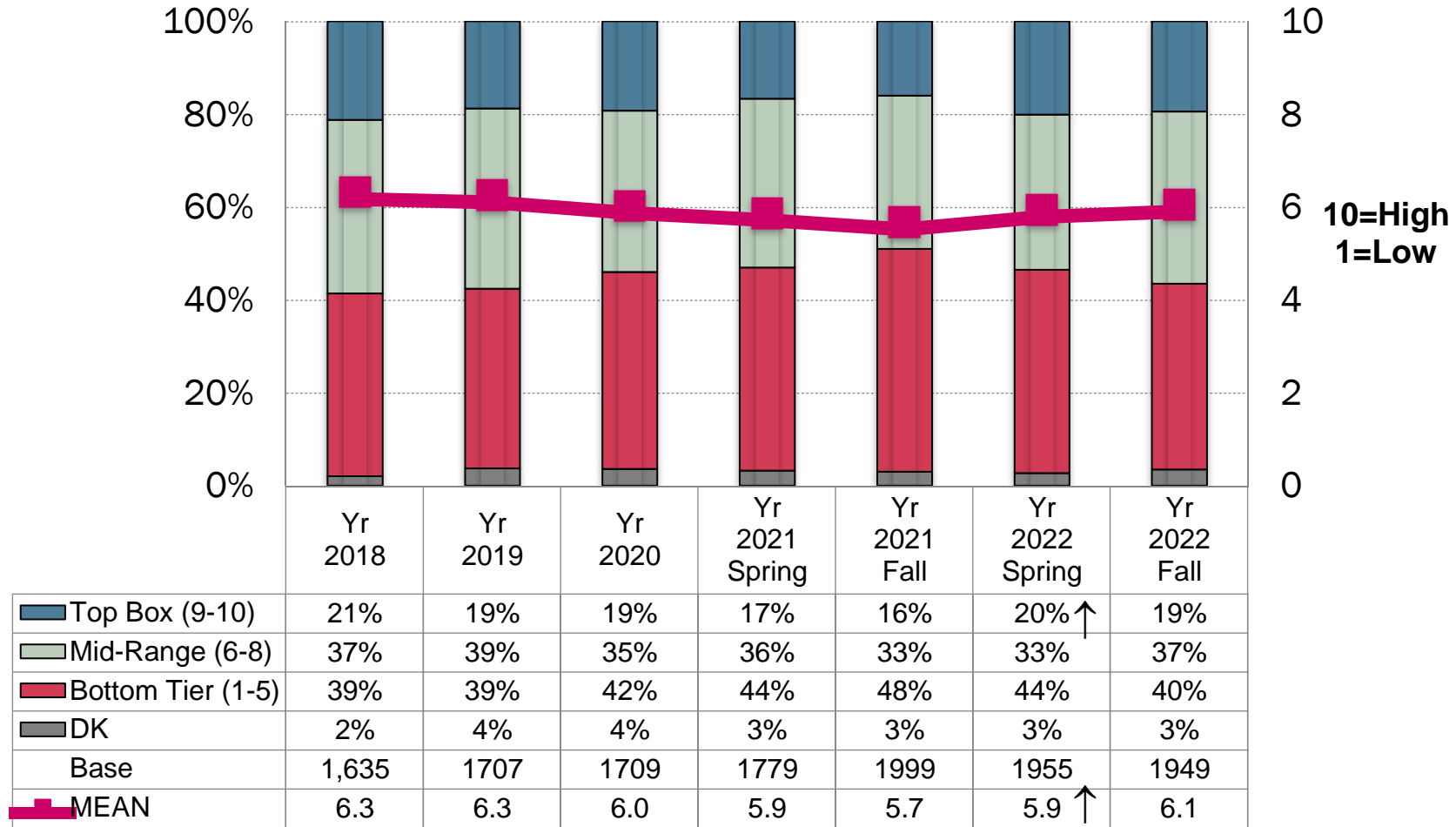
“Tourism has brought more benefits than problems” – *Overall Trend*



In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

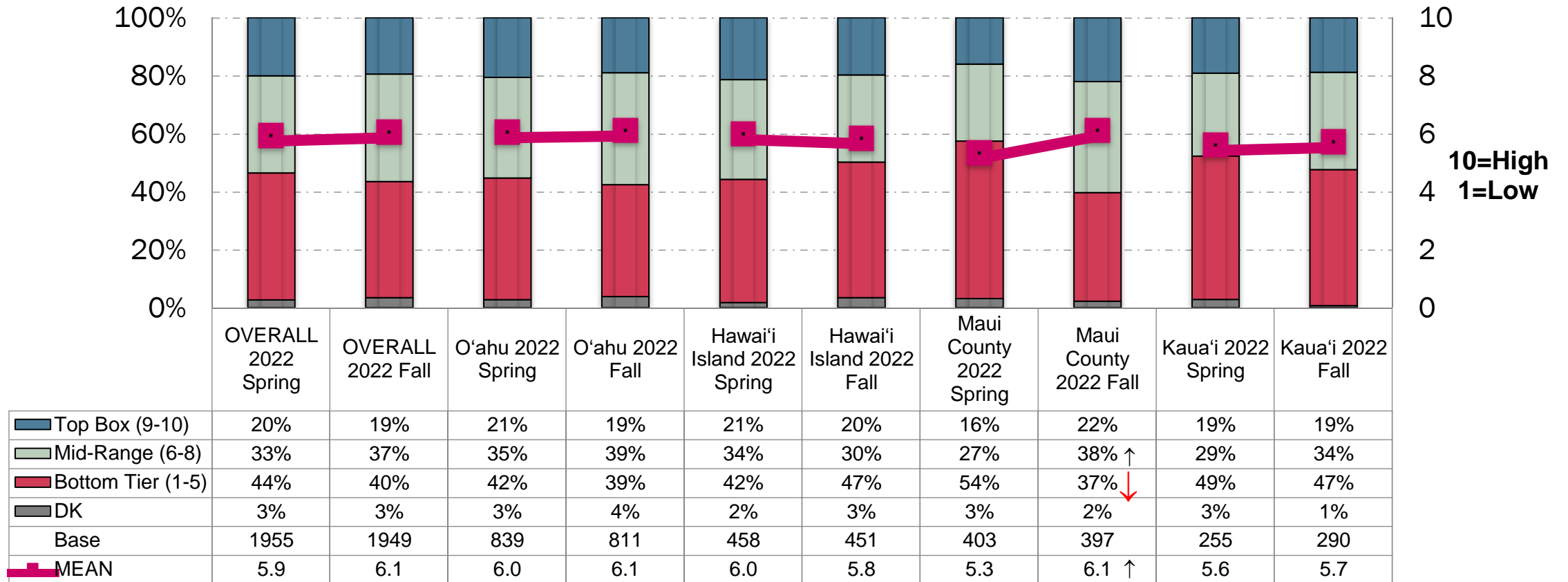
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – Overall



Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

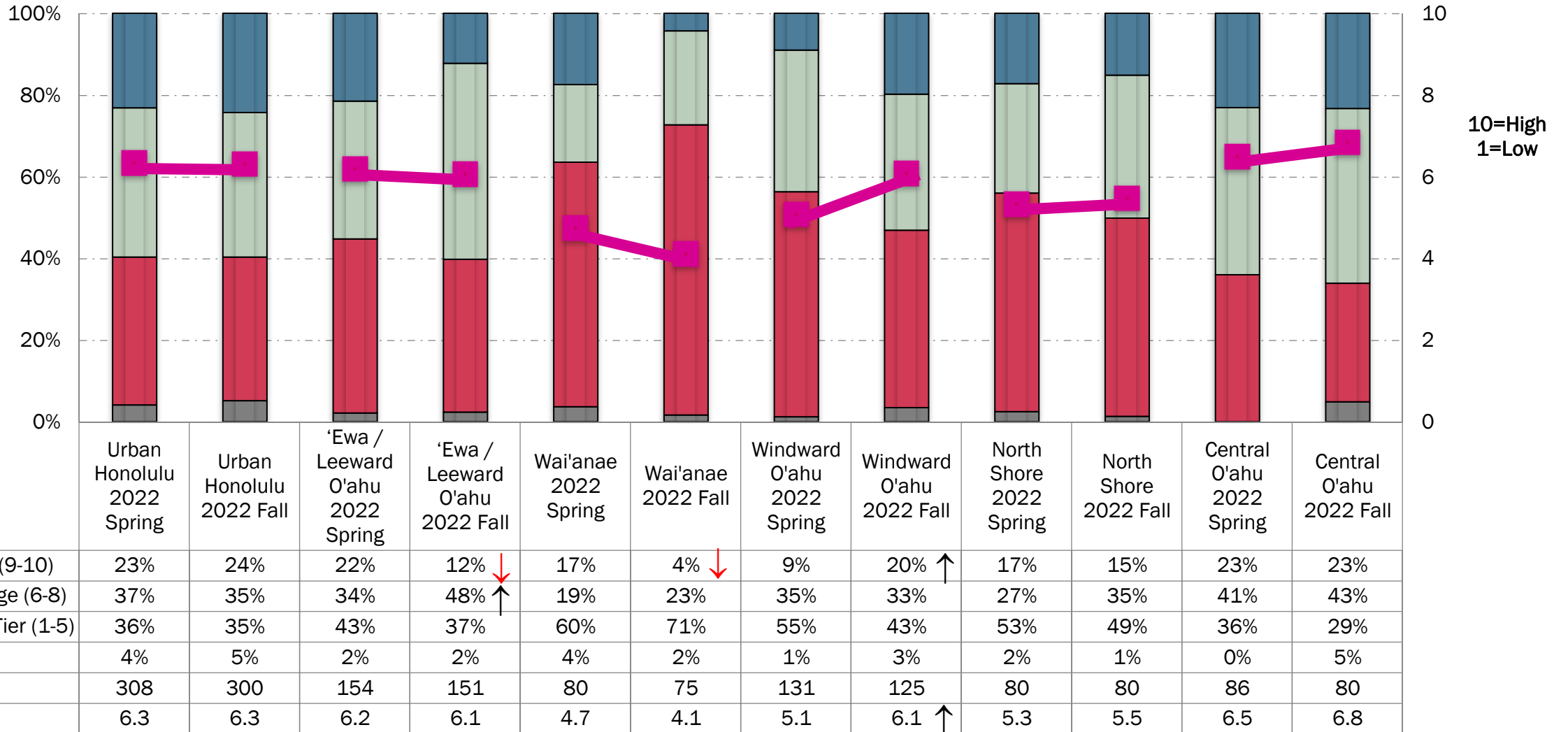
“Tourism has brought more benefits than problems” – *By County*



Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems

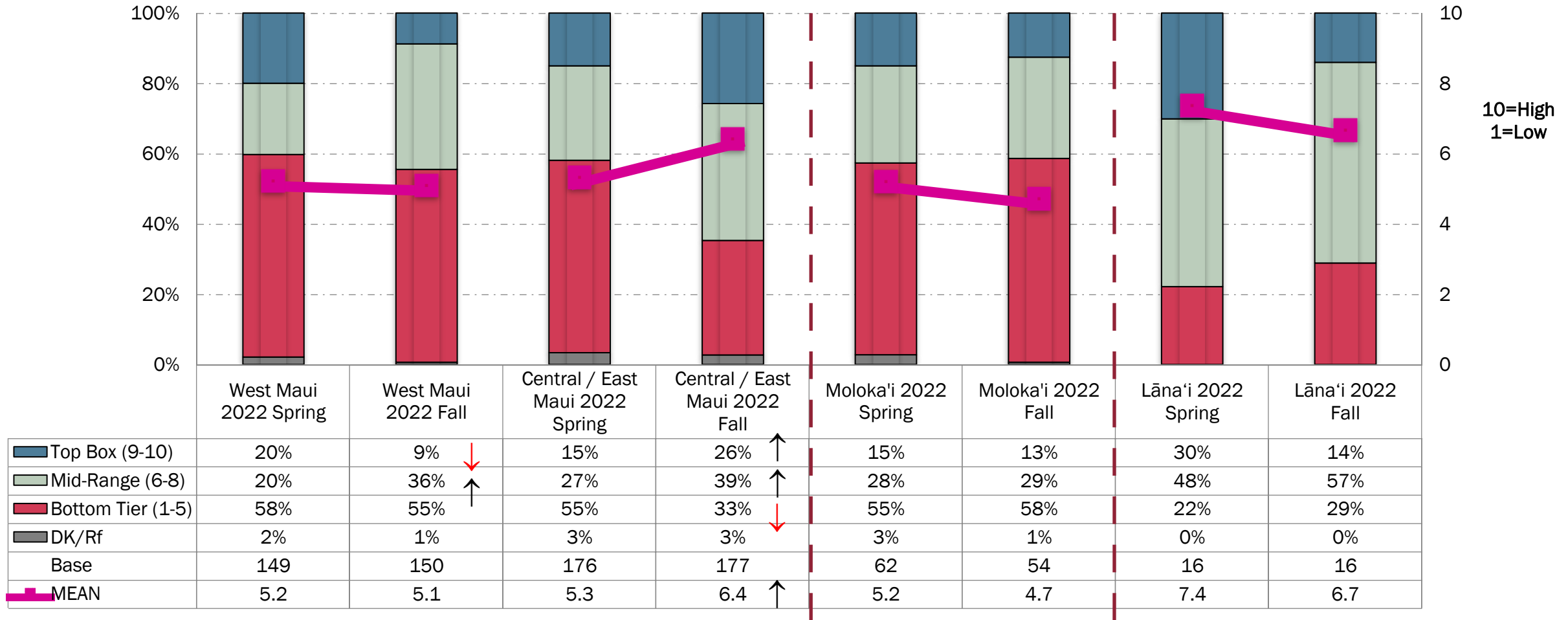
– *By Area (O’ahu)*



Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

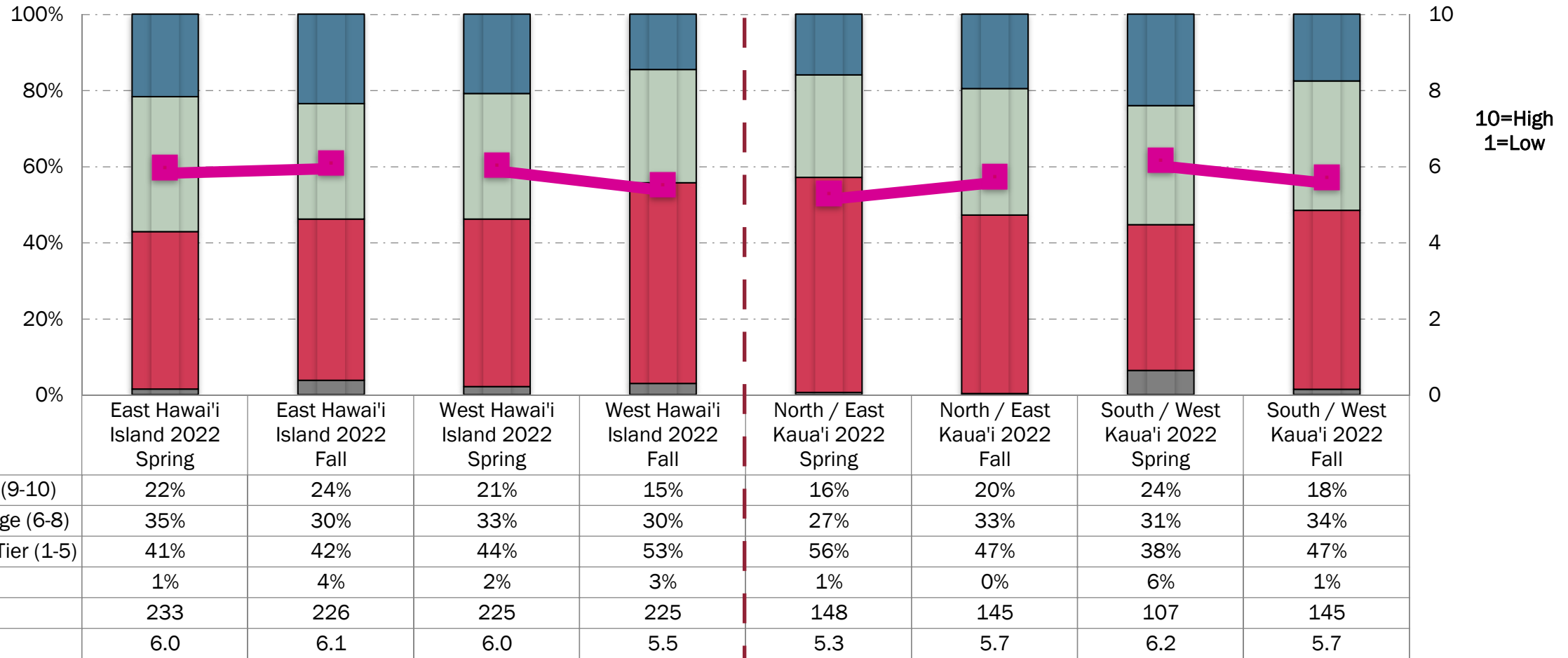
“Tourism has brought more benefits than problems”

– *By Area (Maui County)*



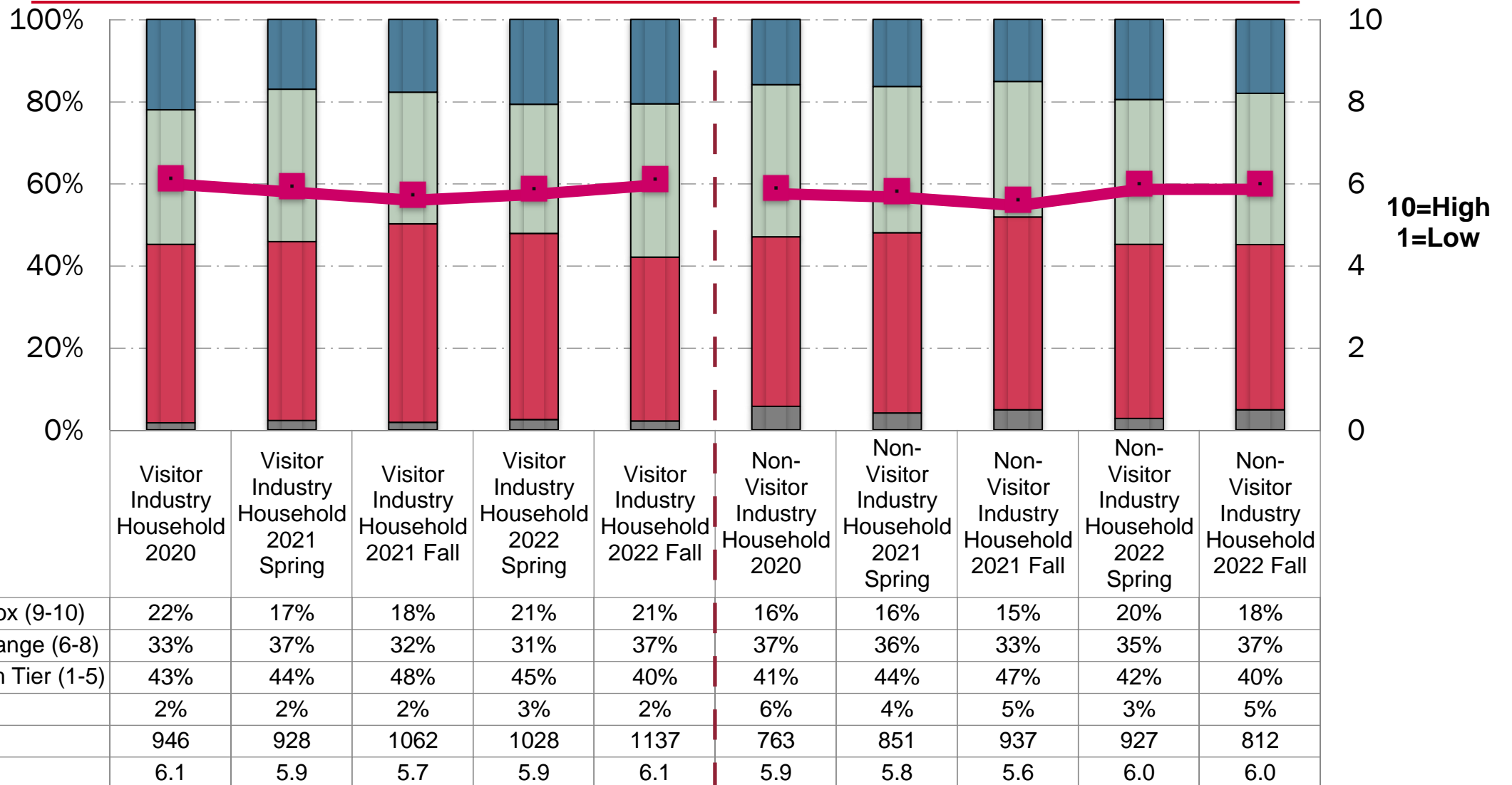
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – By Area (Hawai'i Island & Kaua'i)



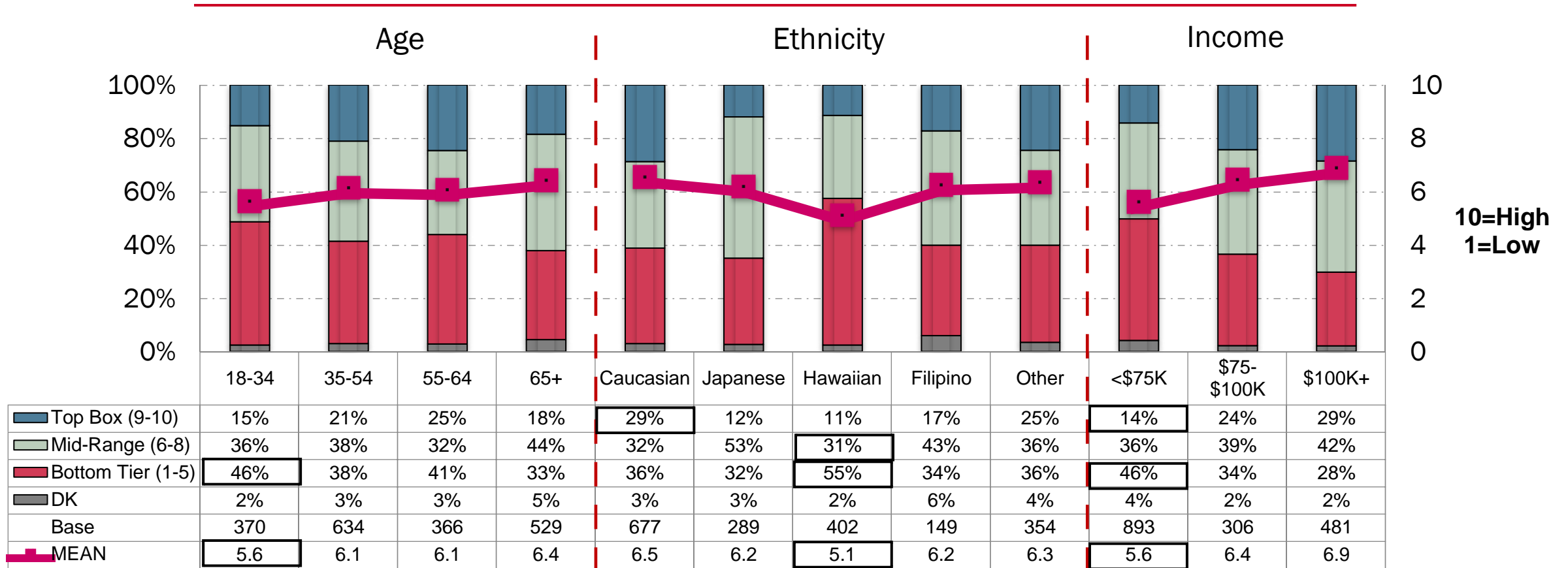
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – Visitor Industry Household vs Non-Visitor Industry Household



Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

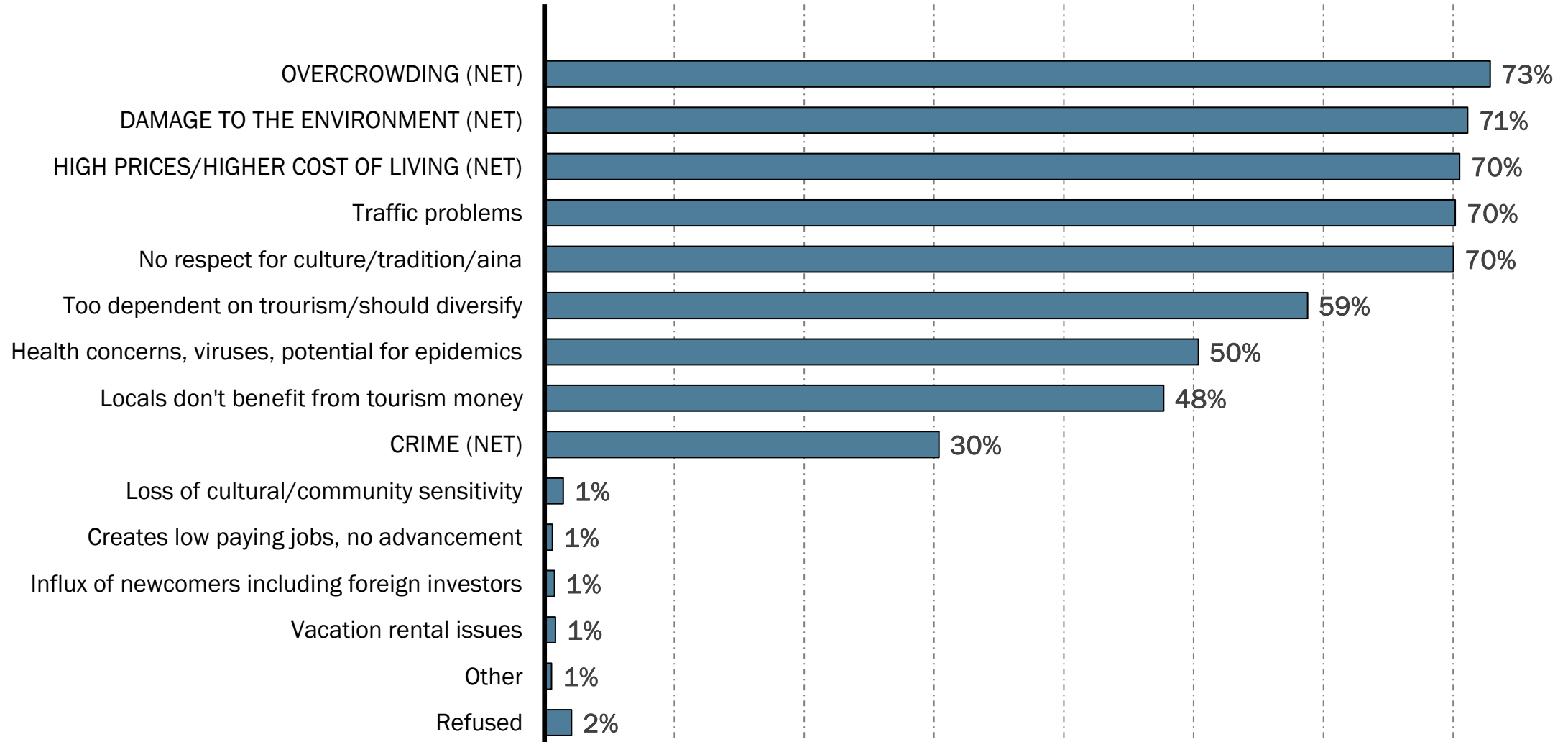
“Tourism has brought more benefits than problems” – *By Demographics*



Q4.1. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Problems Created by Tourism in Hawai'i (Fall 2022 only)

(According to residents saying Hawai'i tourism creates more **problems** than benefits)

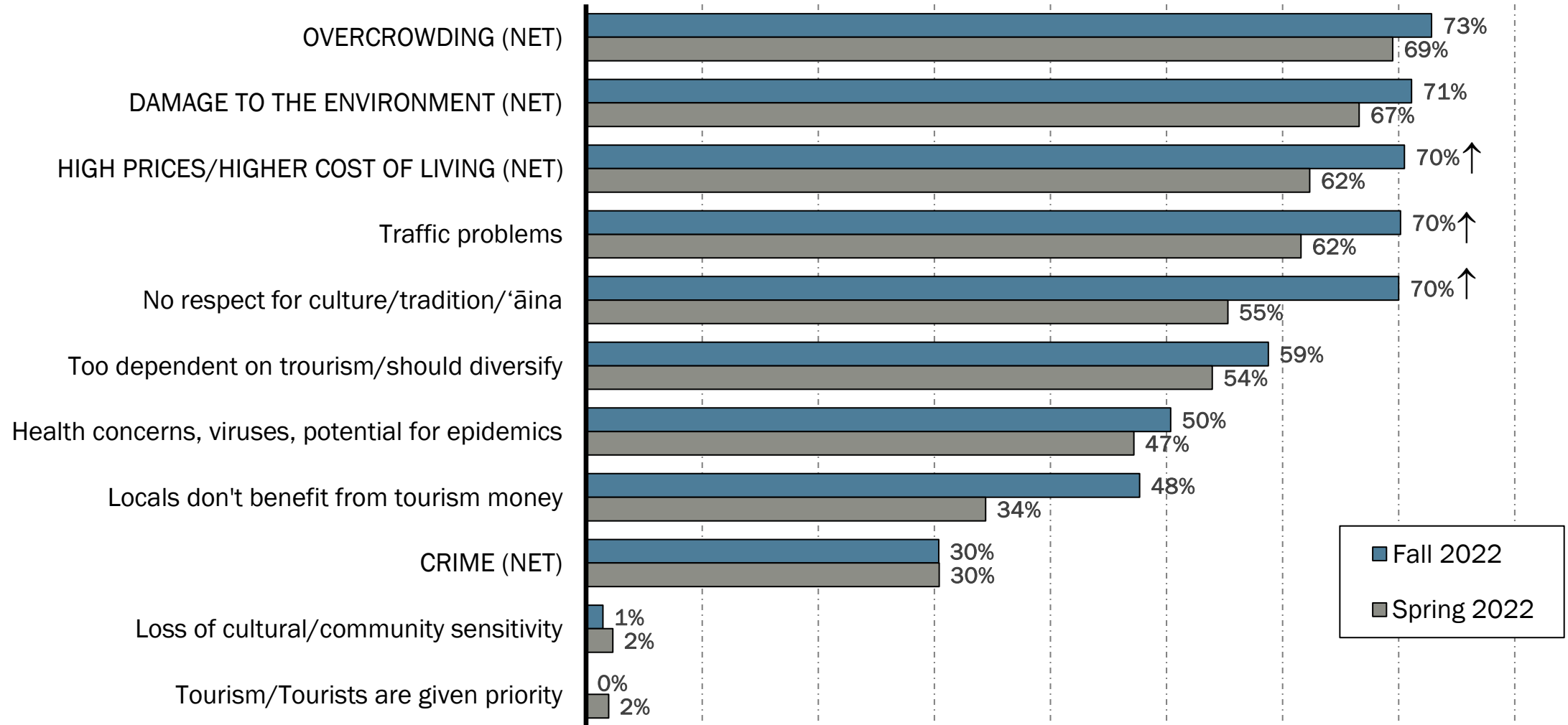


Base: 871

Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Problems Created by Tourism in Hawai'i (Trends Spring-Fall 2022)

(According to residents saying Hawai'i tourism creates more **problems** than benefits)

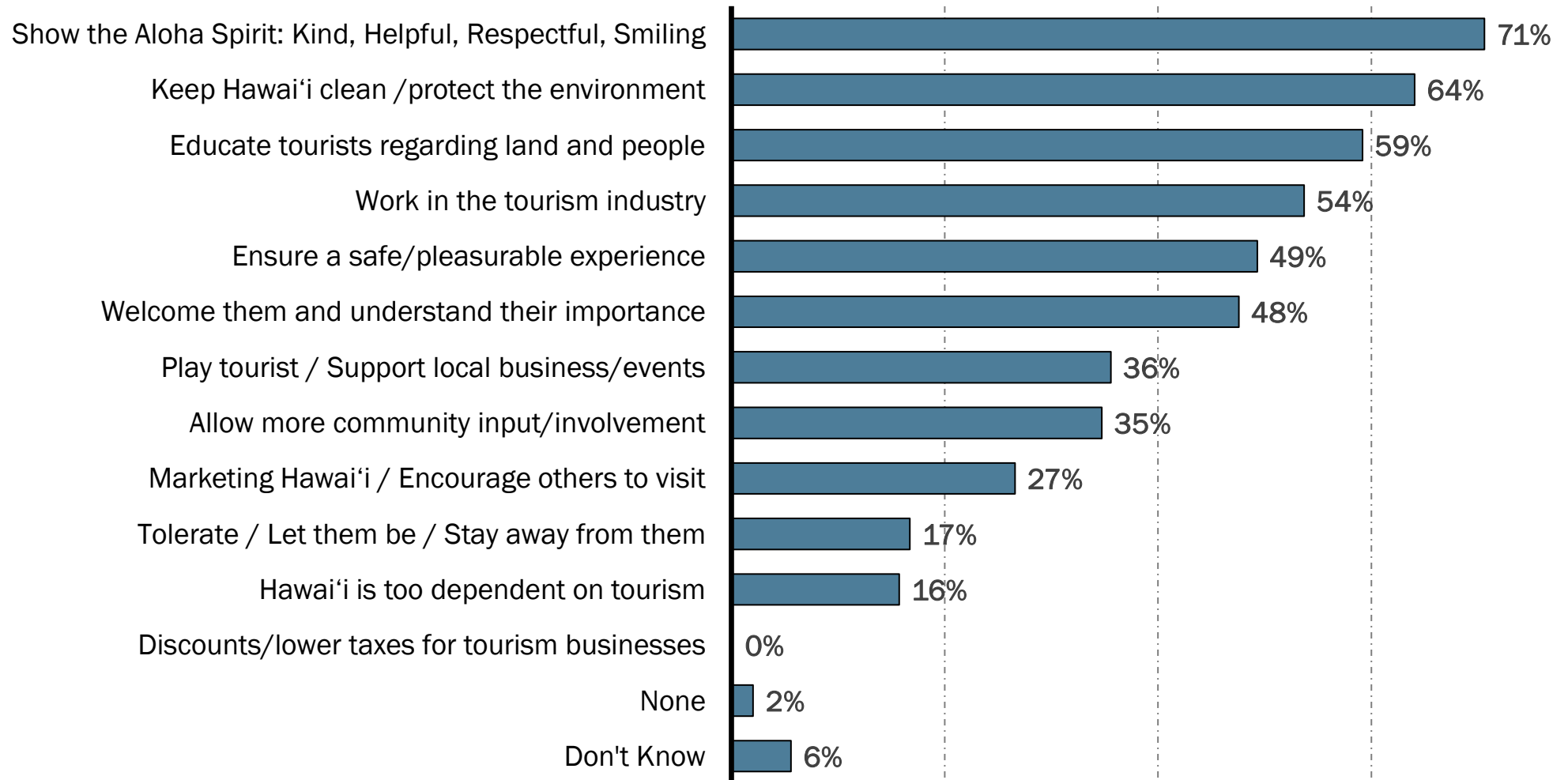


Base: Spring 2022 (856), Fall 2022 (871)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Ways Residents can Support Tourism in Hawai'i (Fall 2022)

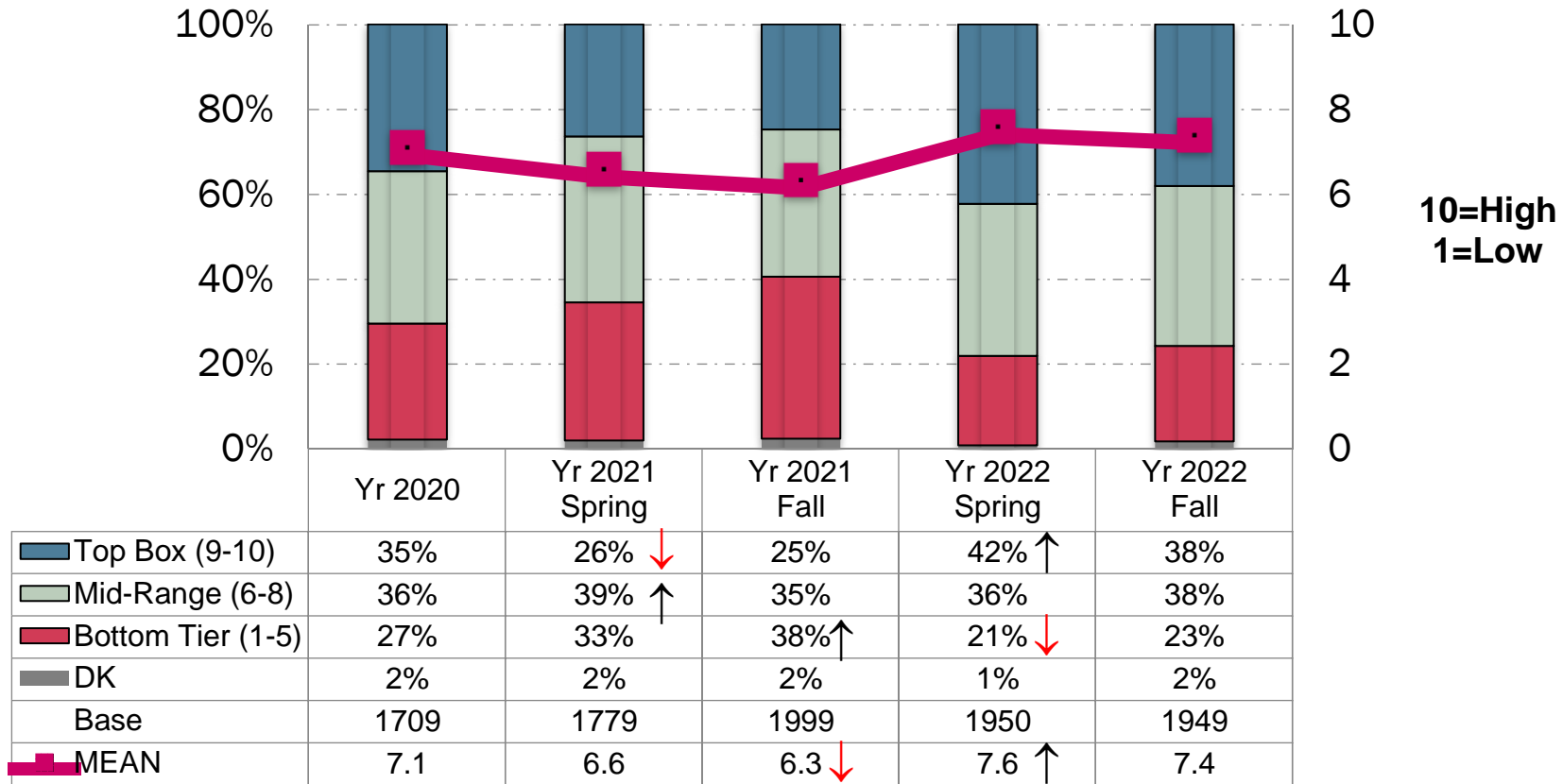
(According to residents saying Hawai'i tourism creates more **benefits** than problems)



Base: 1263 (Fall 2022)

Q6. You indicated earlier that you were favorable toward tourism. Is there anything that residents like yourself can do to contribute to or support the tourism industry?

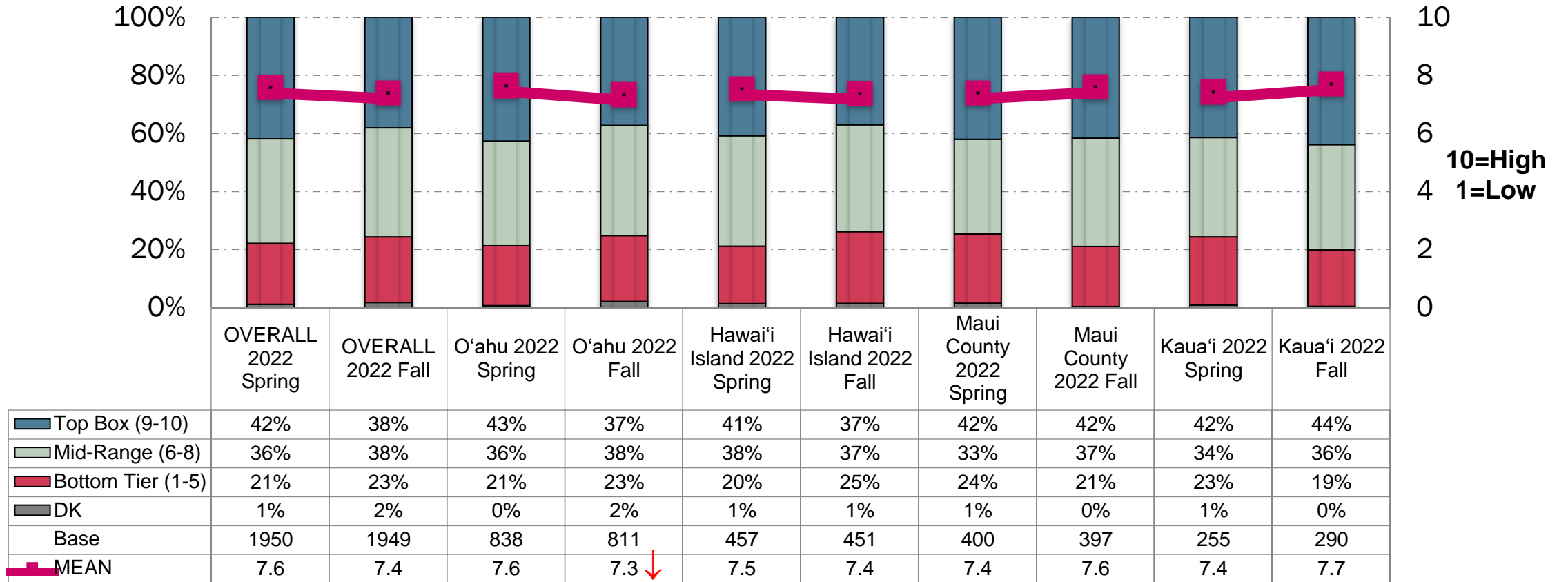
“Creates job opportunities for residents”* - Overall



Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

*Note: Changed in Spring 2022 fielding from “Tourism creates many well-paying jobs for residents.”

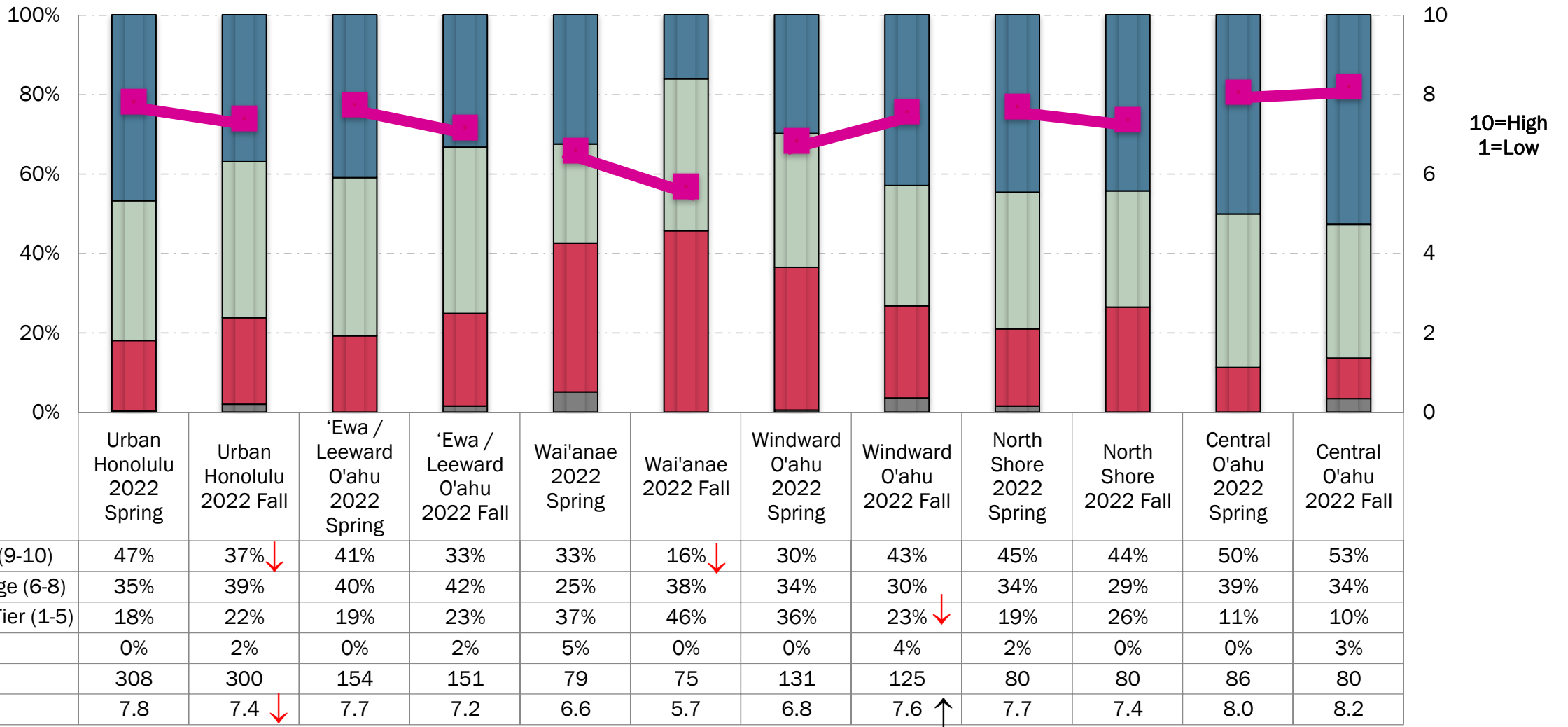
“Creates job opportunities for residents”* – *By County*



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

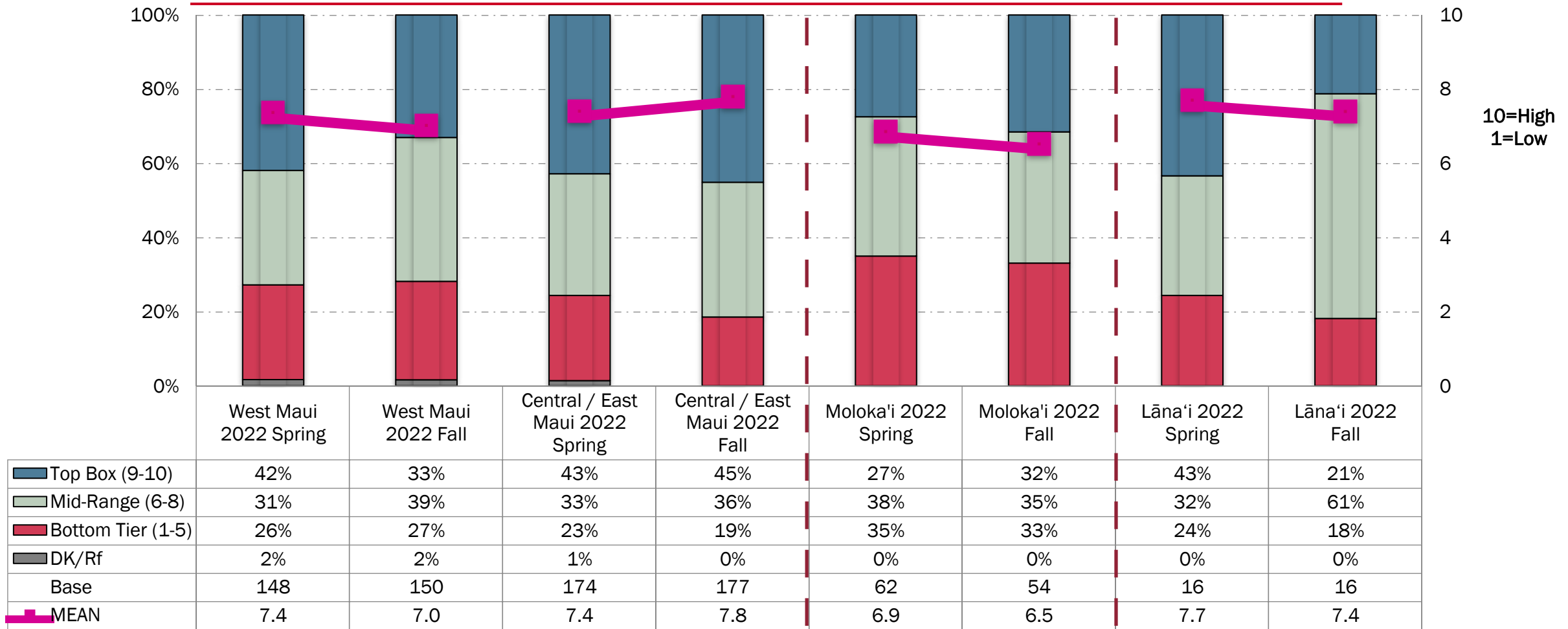
*Note: Changed in Spring 2022 fielding from “Tourism creates many well-paying jobs for residents.”

“Creates job opportunities for residents” – *By Area (O’ahu)*



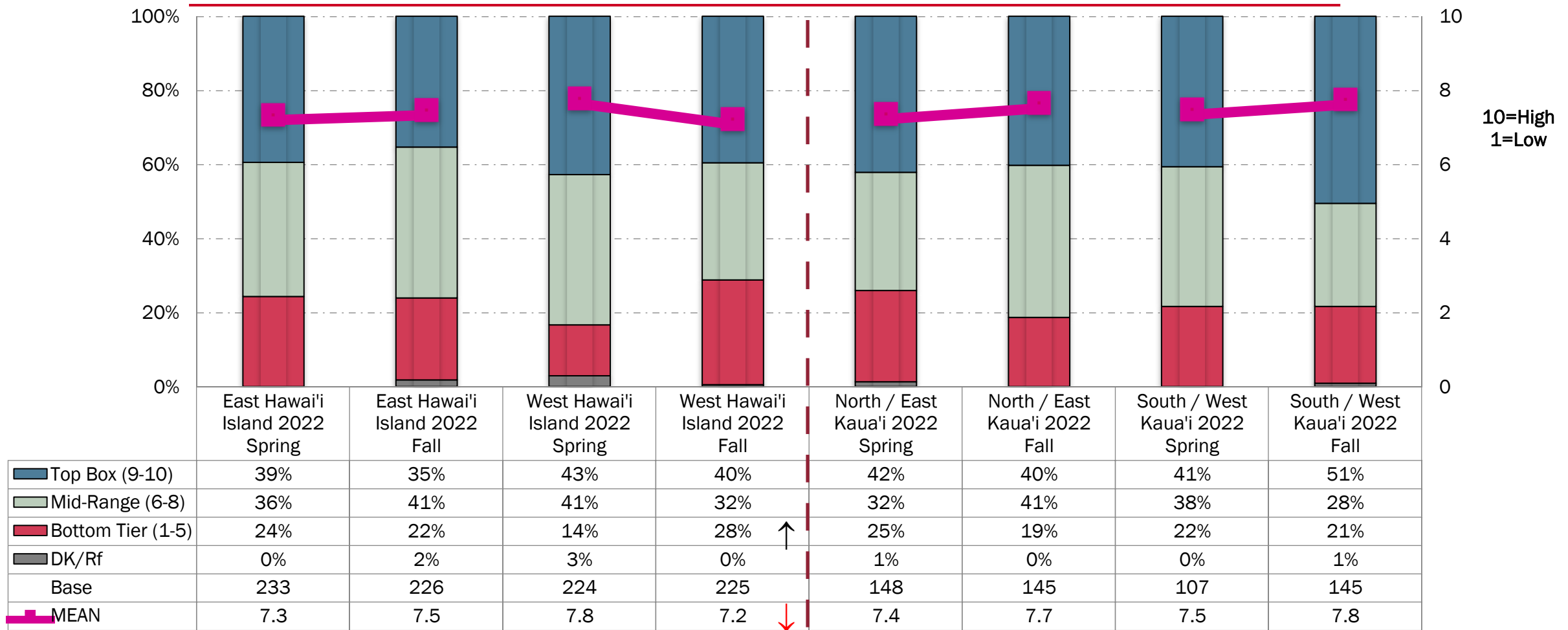
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates job opportunities for residents” – *By Area (Maui County)*



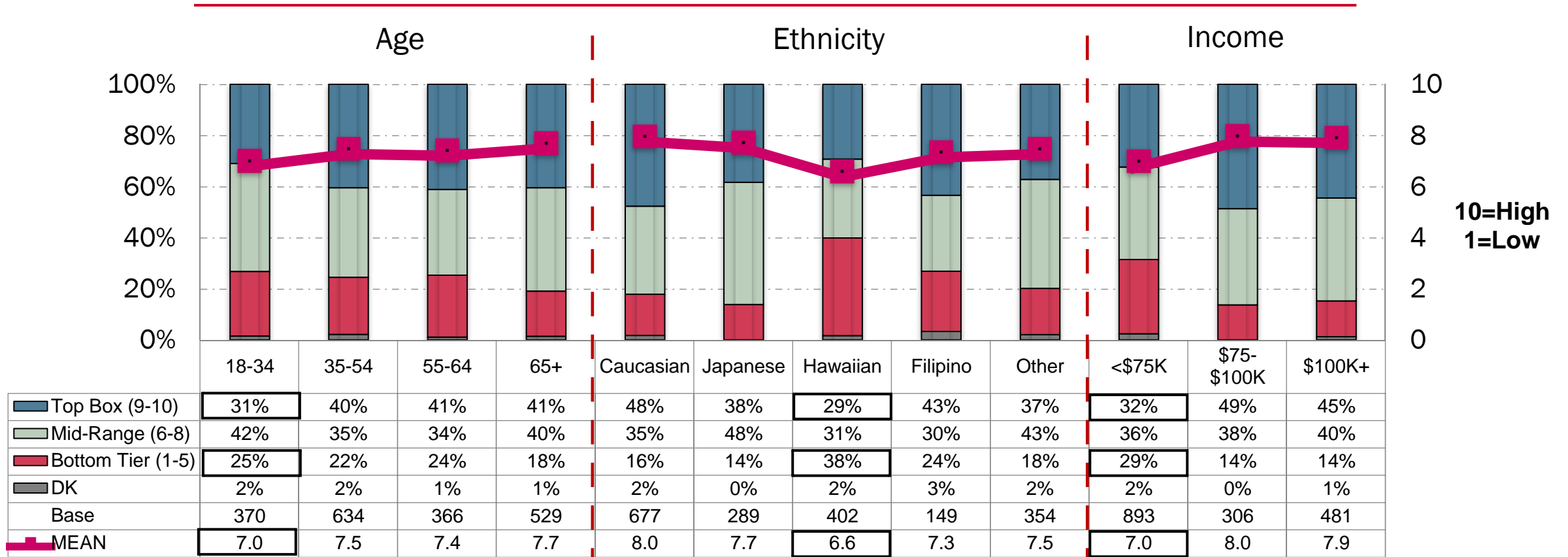
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

“Creates job opportunities for residents” – *By Area (Hawai'i Island & Kaua'i)*



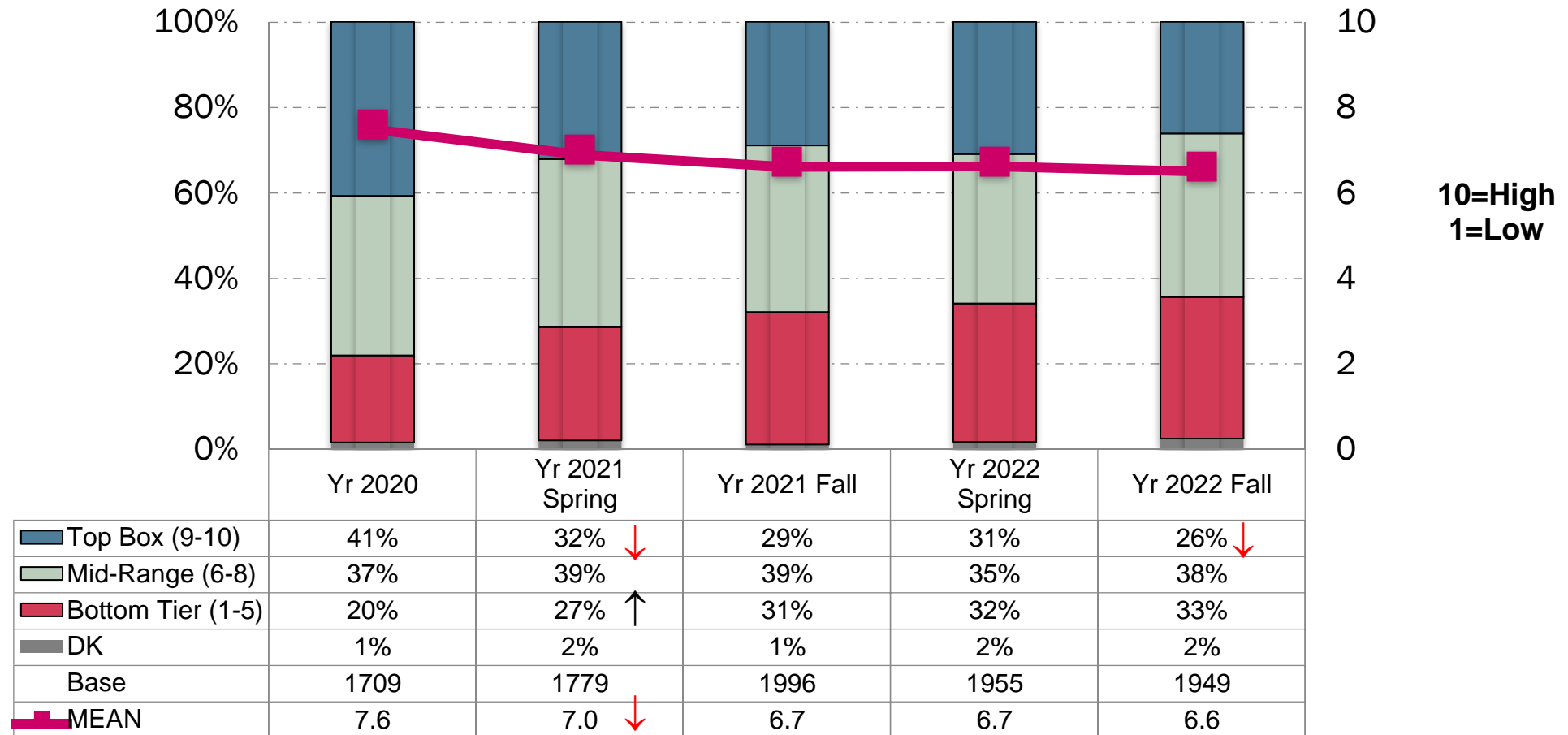
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

“Creates job opportunities for residents” – *By Demographics*



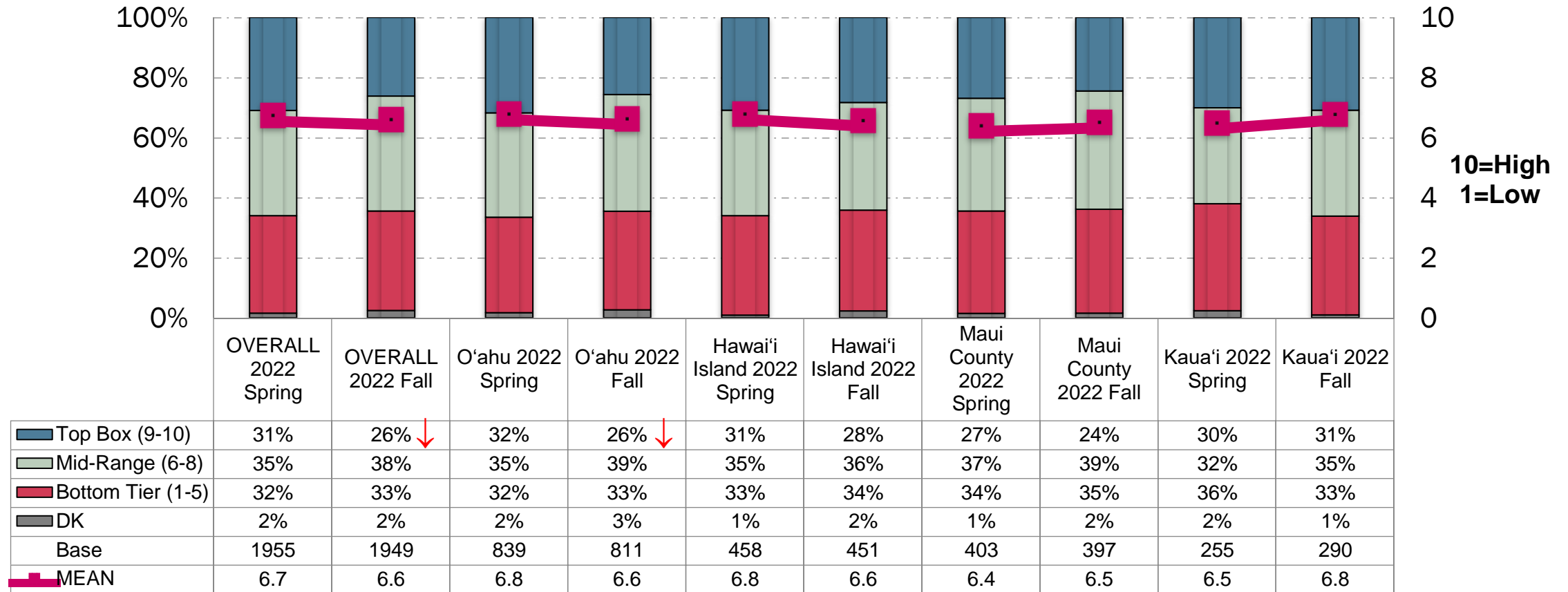
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Creates shopping, dining, and entertainment opportunities for residents” - Overall



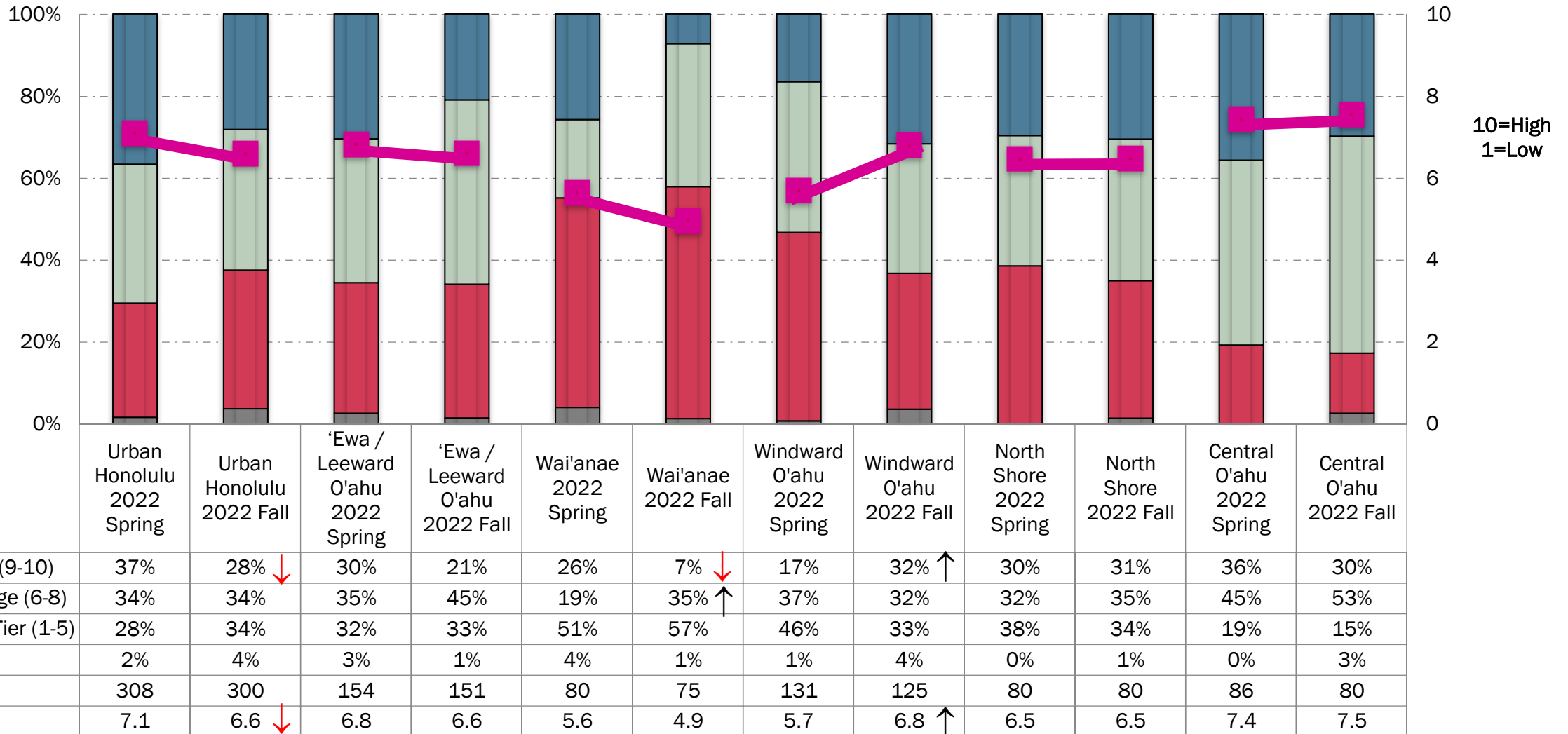
Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates shopping, dining, and entertainment opportunities for residents” – *By County*



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates shopping, dining, and entertainment opportunities for residents” – *By Area (O’ahu)*



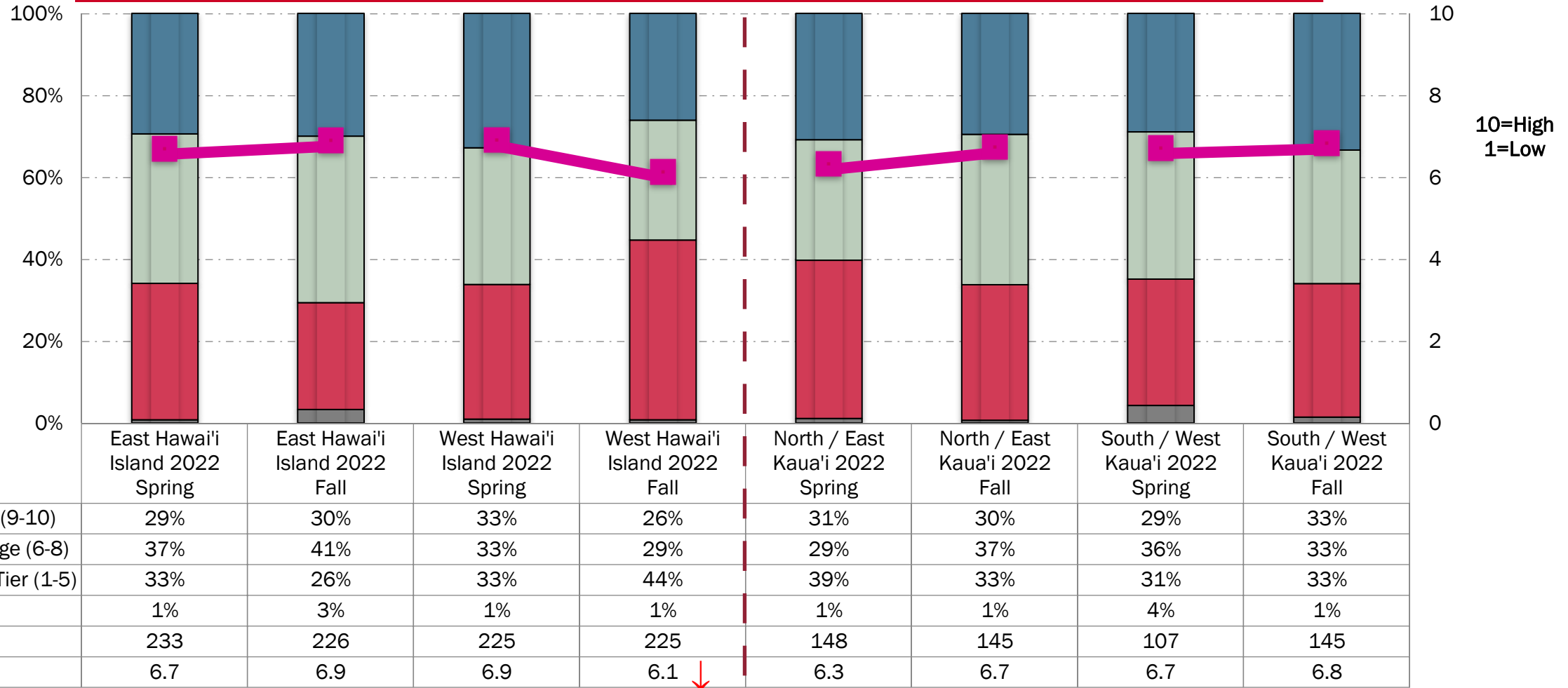
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates shopping, dining, and entertainment opportunities for residents” – *By Area (Maui County)*



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

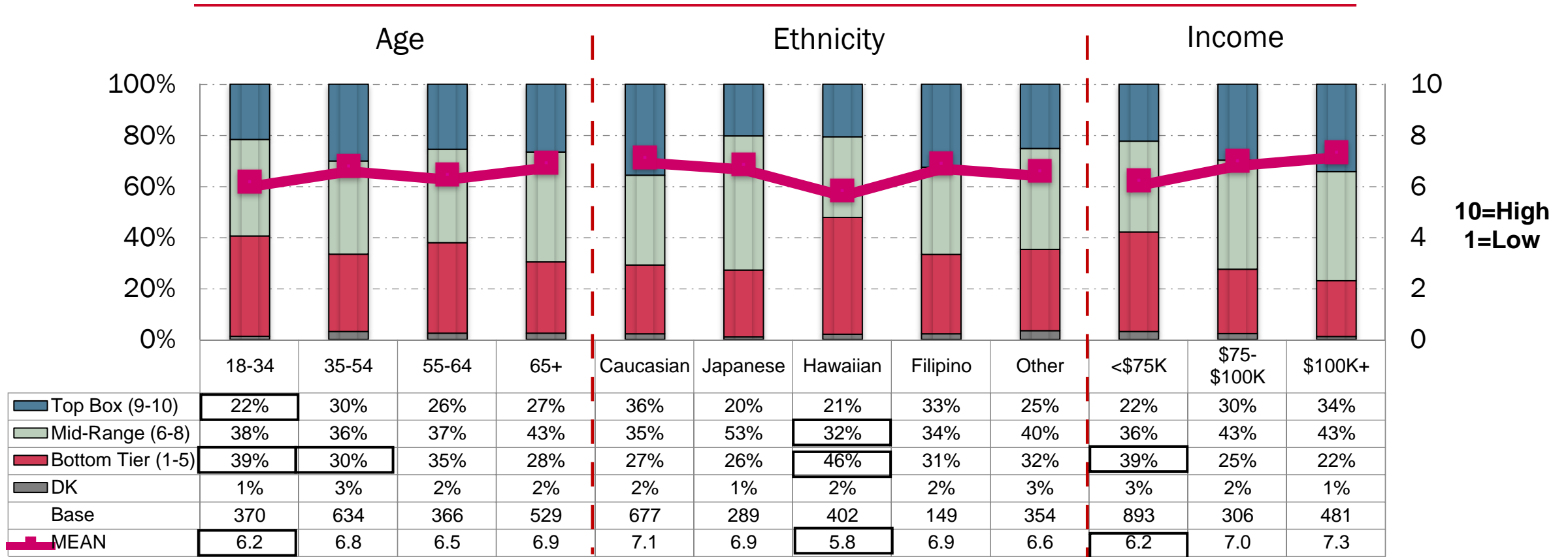
“Creates shopping, dining, and entertainment opportunities for residents” – *By Area (Hawai'i Island & Kaua'i)*



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

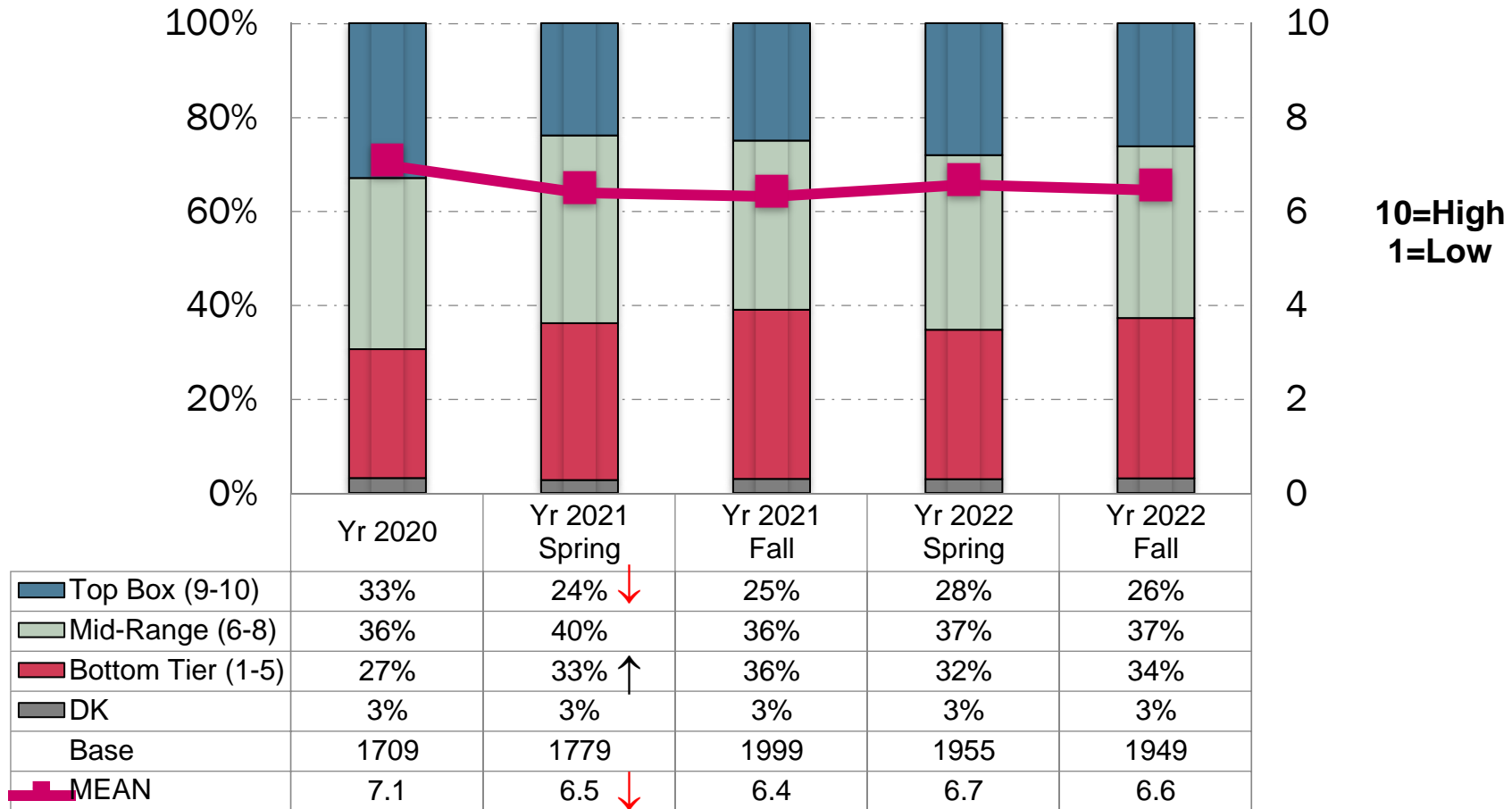
“Creates shopping, dining and entertainment opportunities for residents”

– *By Demographics*



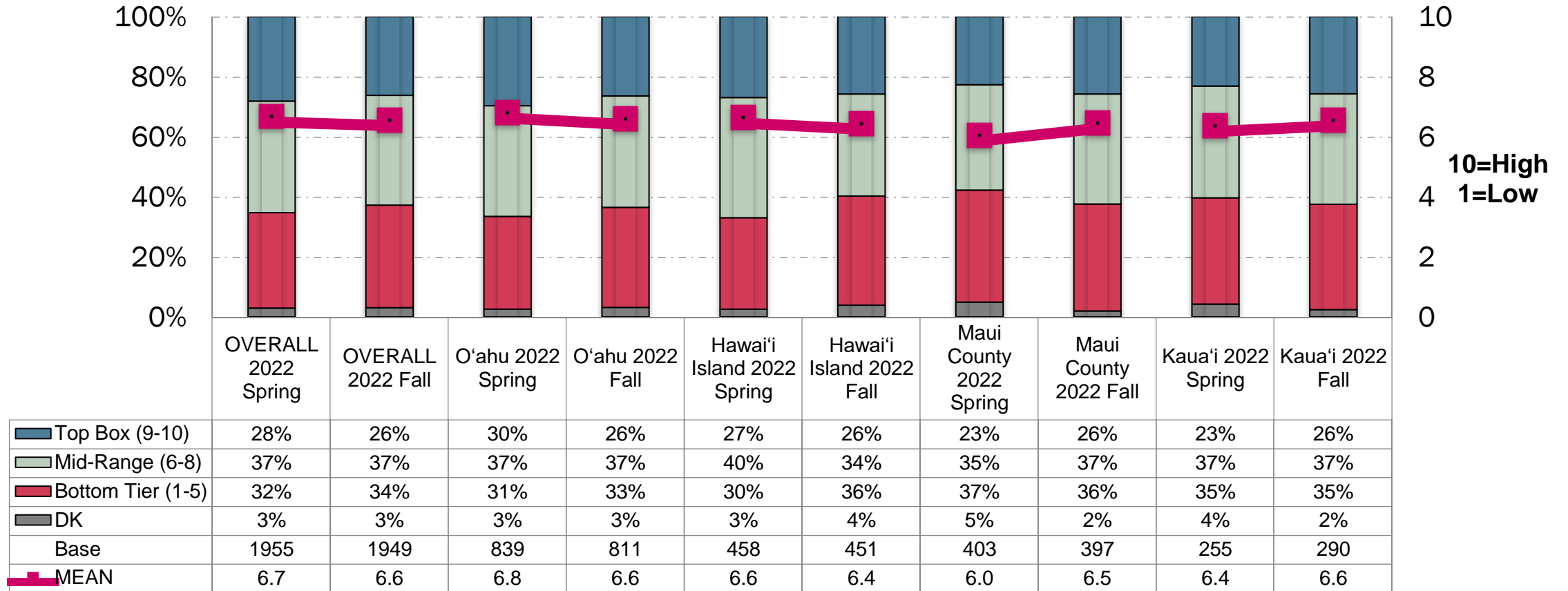
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Creates job opportunities with paths for advancement” - Overall



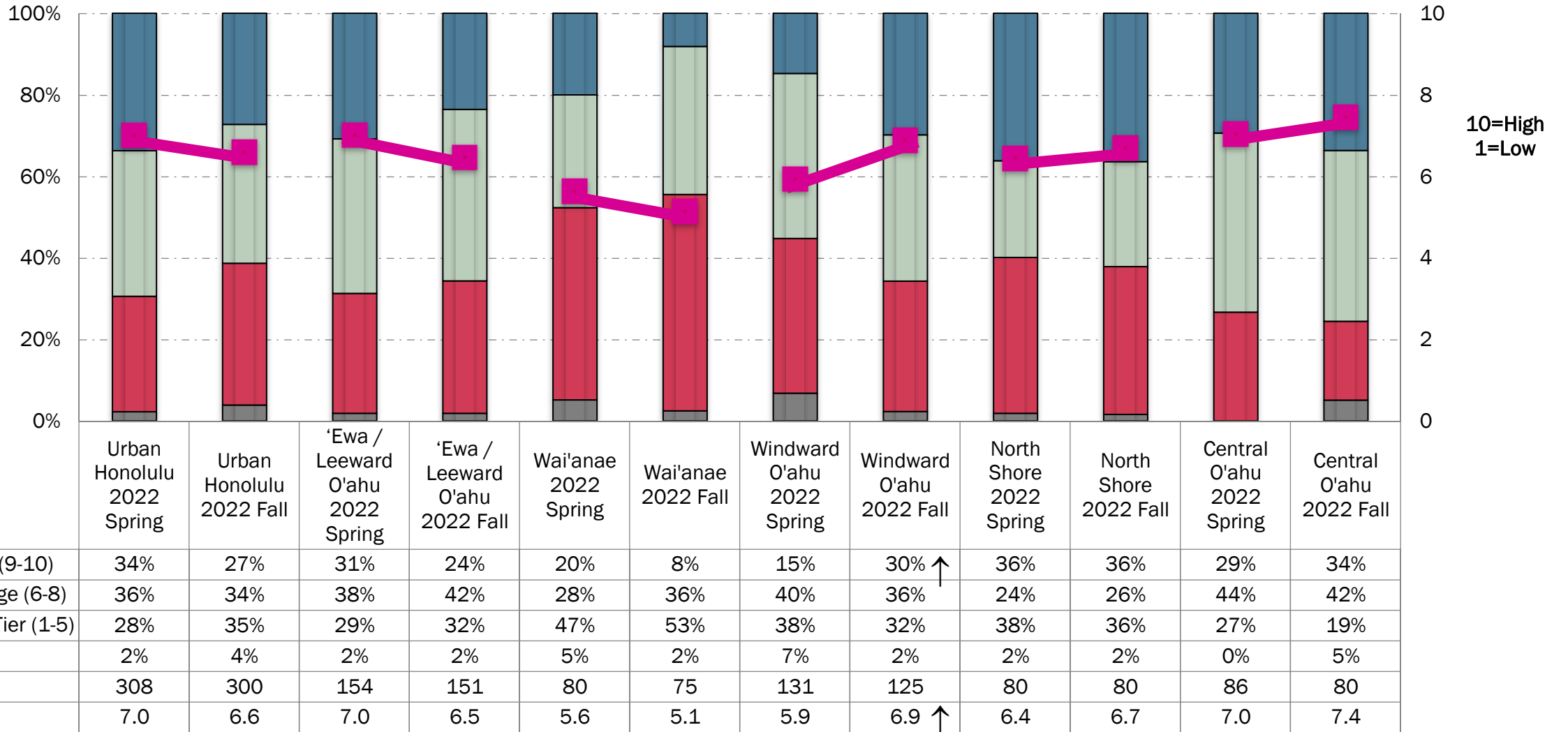
Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates job opportunities with paths for advancement” – *By County*



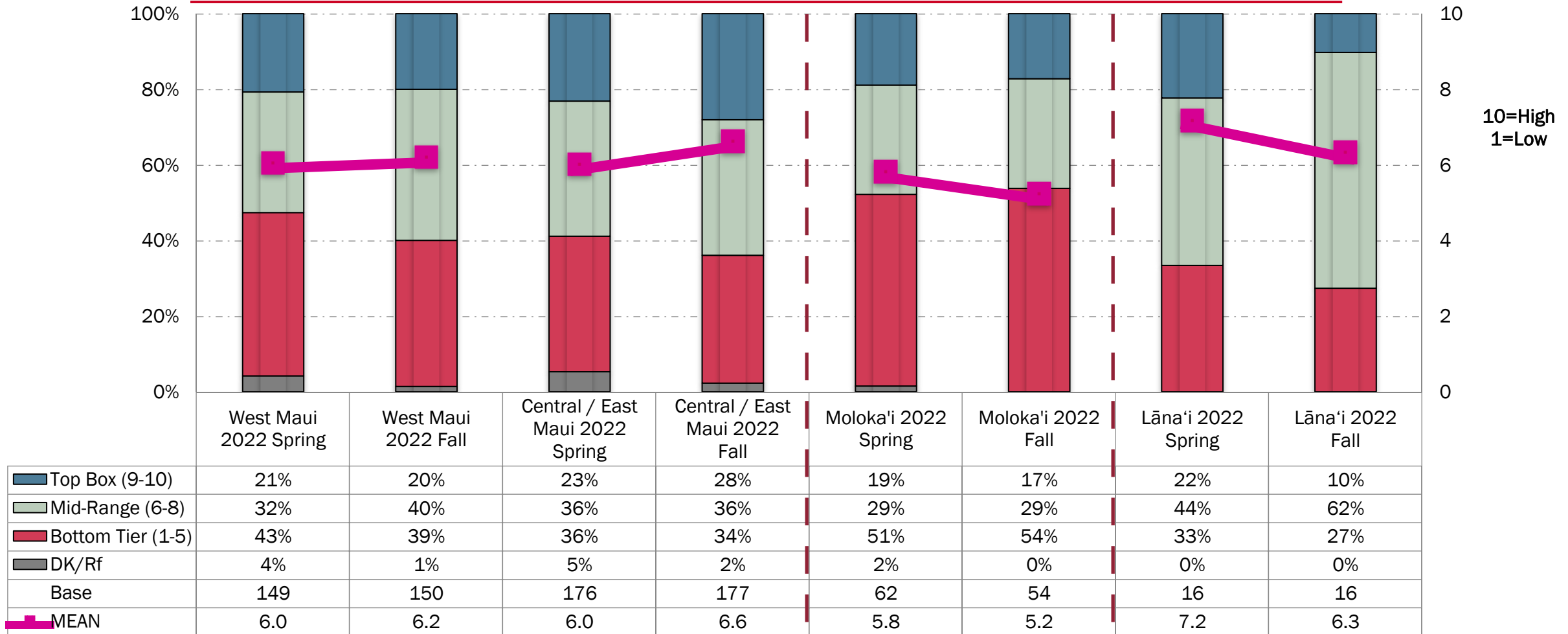
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates job opportunities with paths for advancement” – By Area (O’ahu)



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

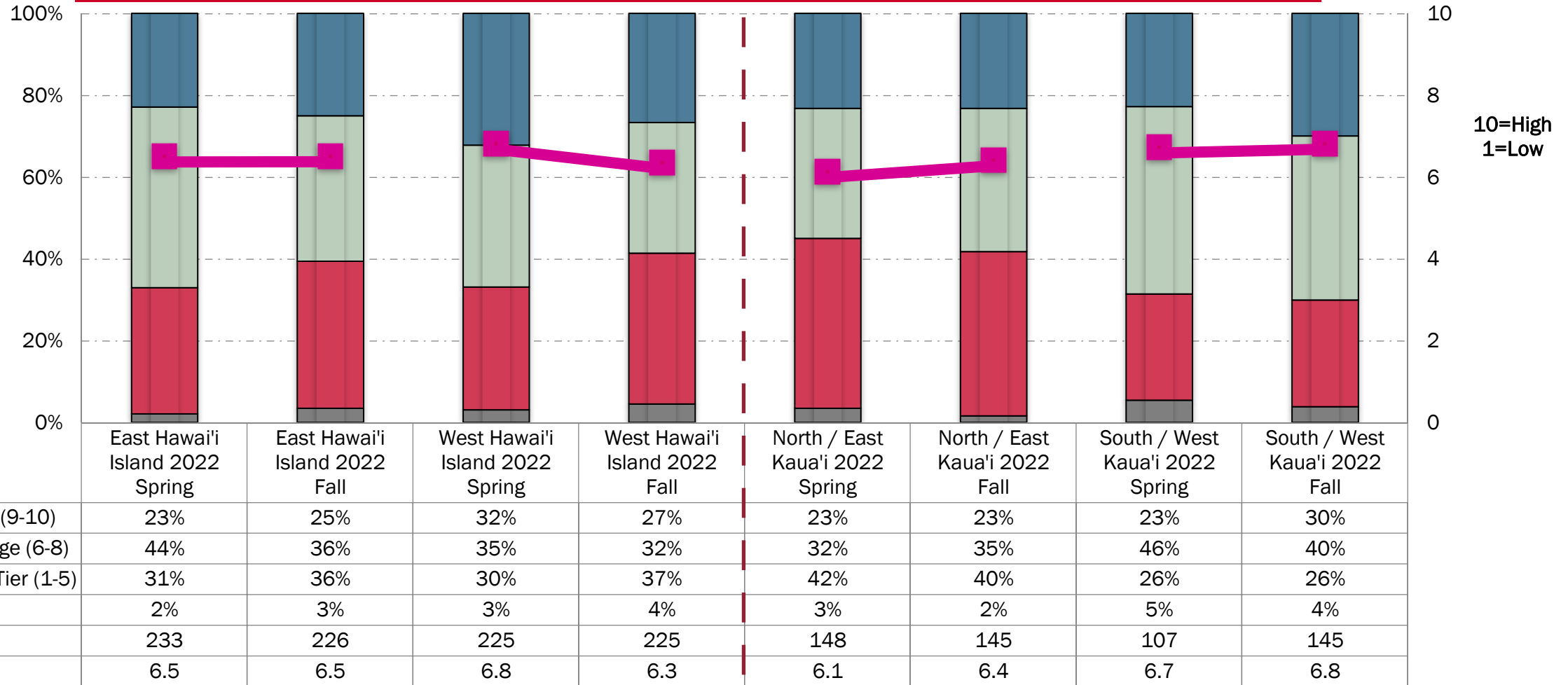
“Creates job opportunities with paths for advancement”* – By Area (Maui County)



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

*Note: Changed in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

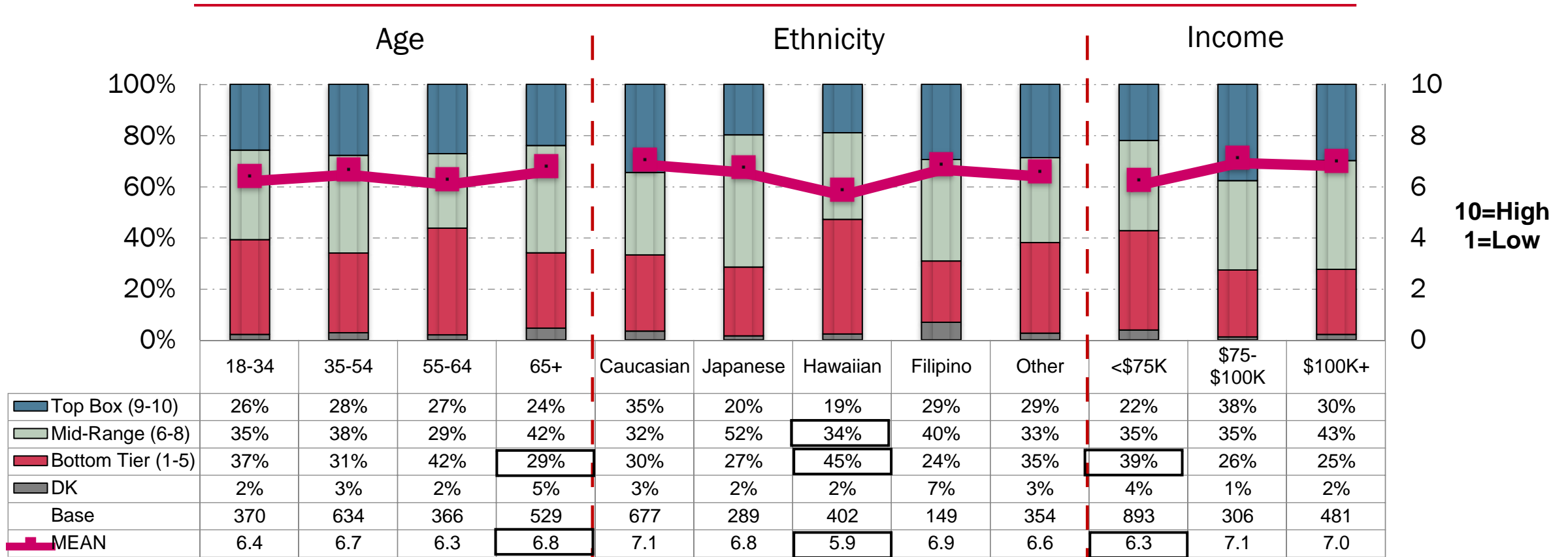
“Creates job opportunities with paths for advancement”* – By Area (Hawai‘i Island & Kaua‘i)



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

*Note: Changed in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

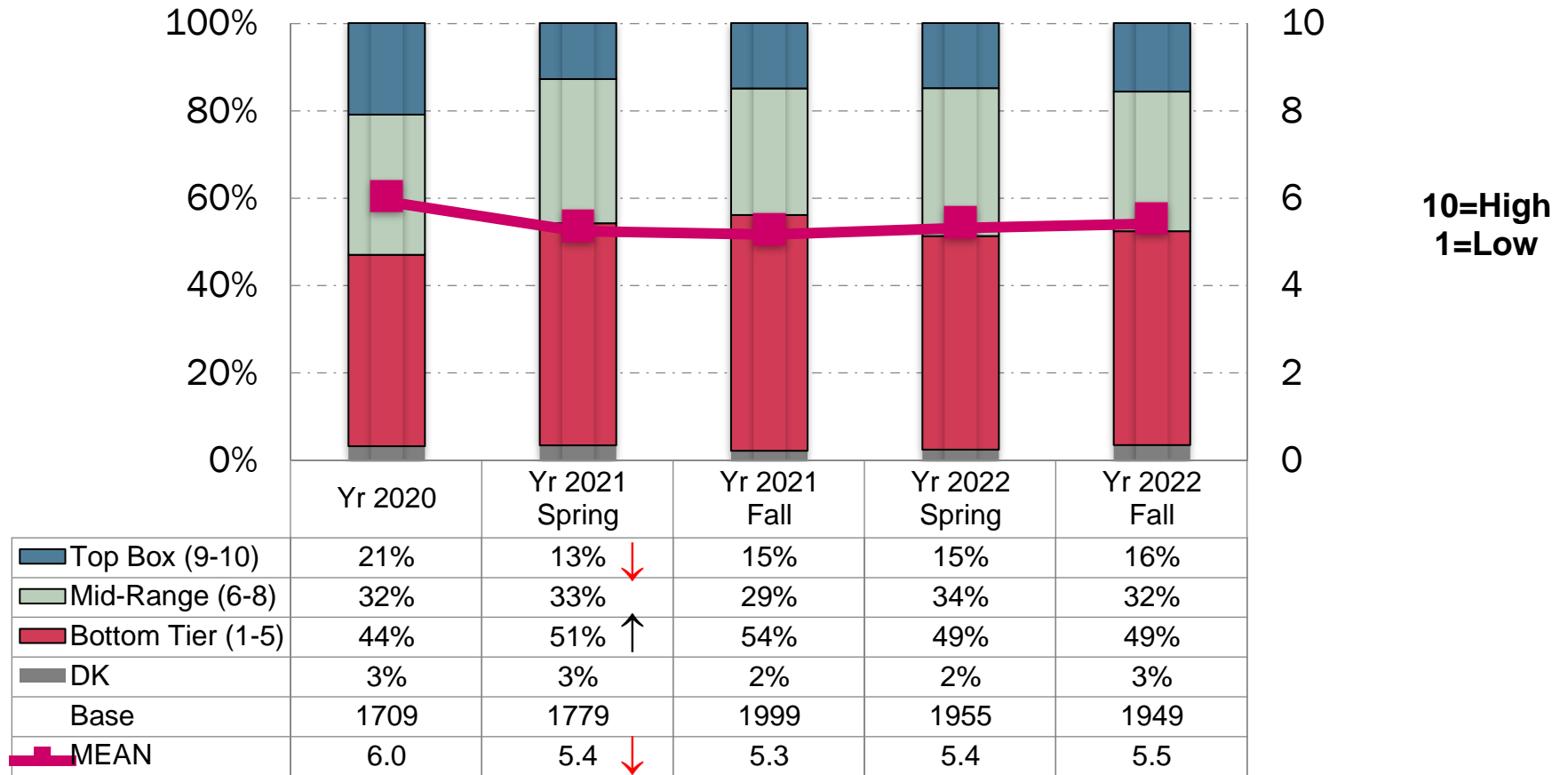
“Creates job opportunities with paths for advancement” – *By Demographics*



Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

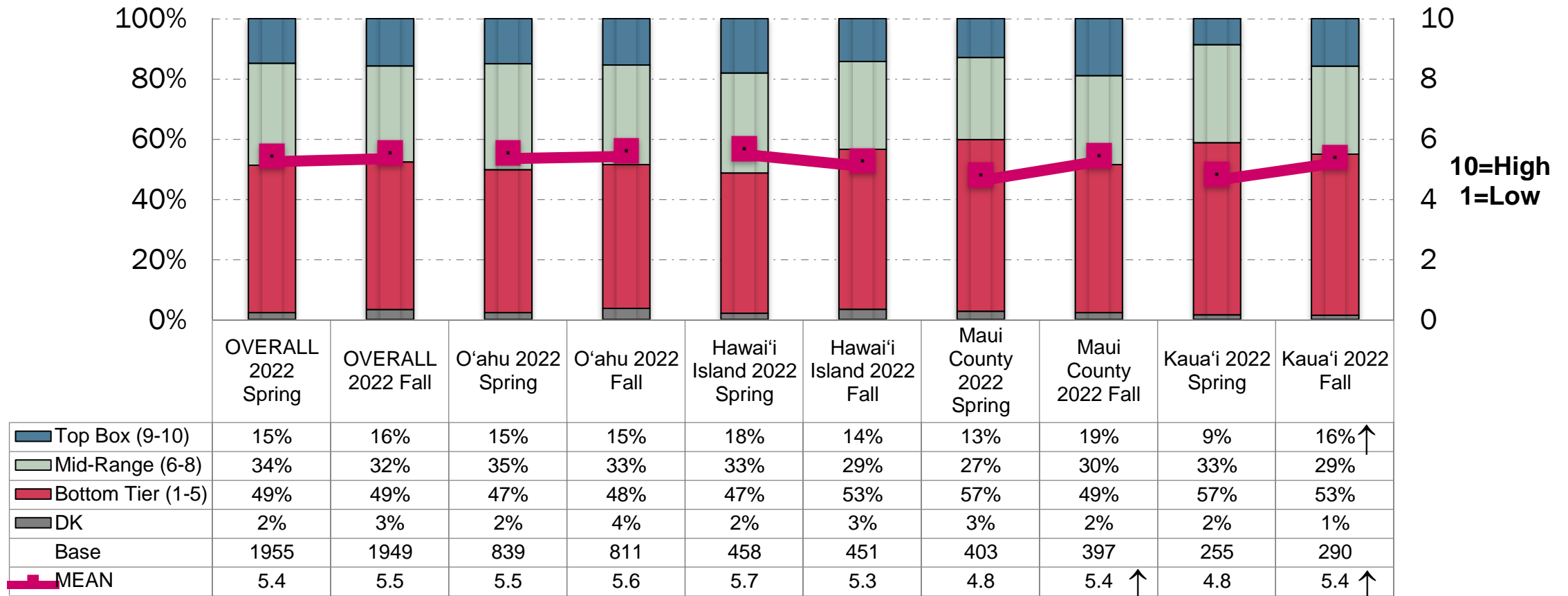
“Is an industry that enhances residents’ quality of life”

- Overall



Q3.6. I’m going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Is an industry that enhances residents’ quality of life” – *By County*



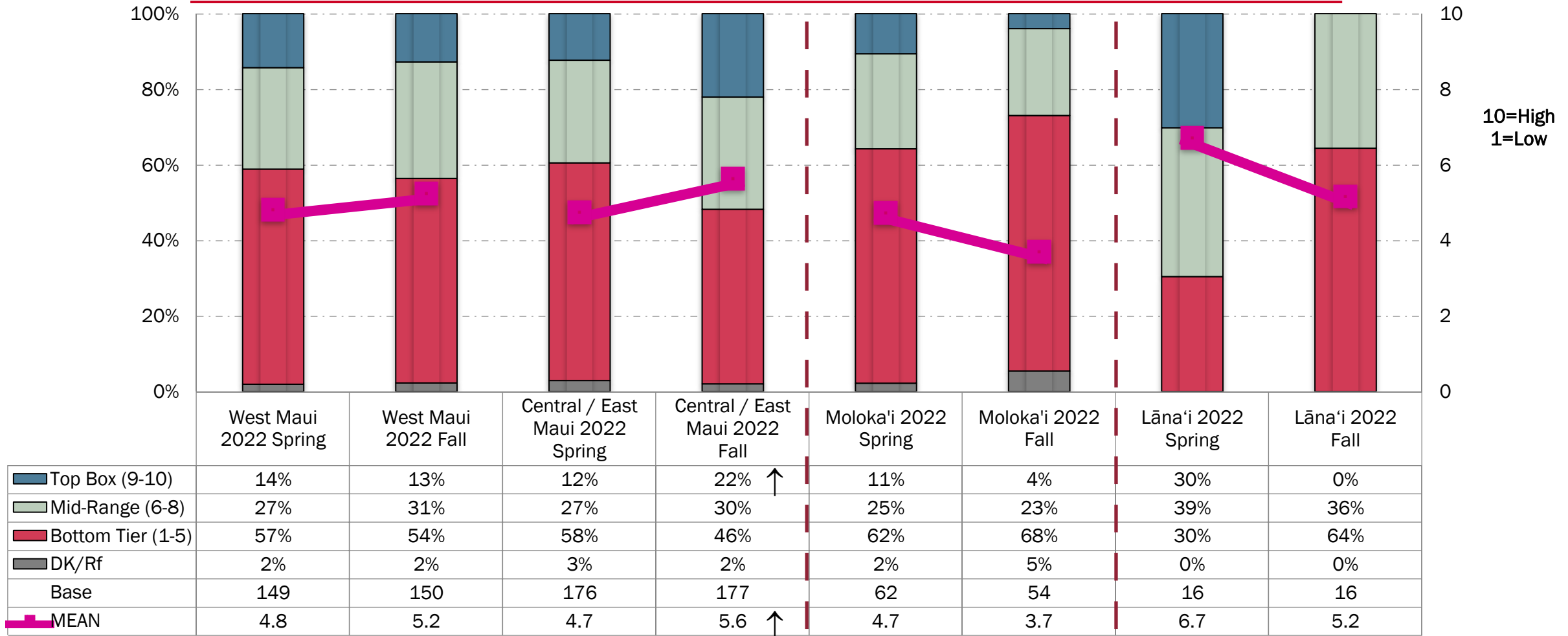
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Is an industry that enhances residents’ quality of life” – By Area (O’ahu)



Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Is an industry that enhances residents’ quality of life” – By Area (Maui County)



Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

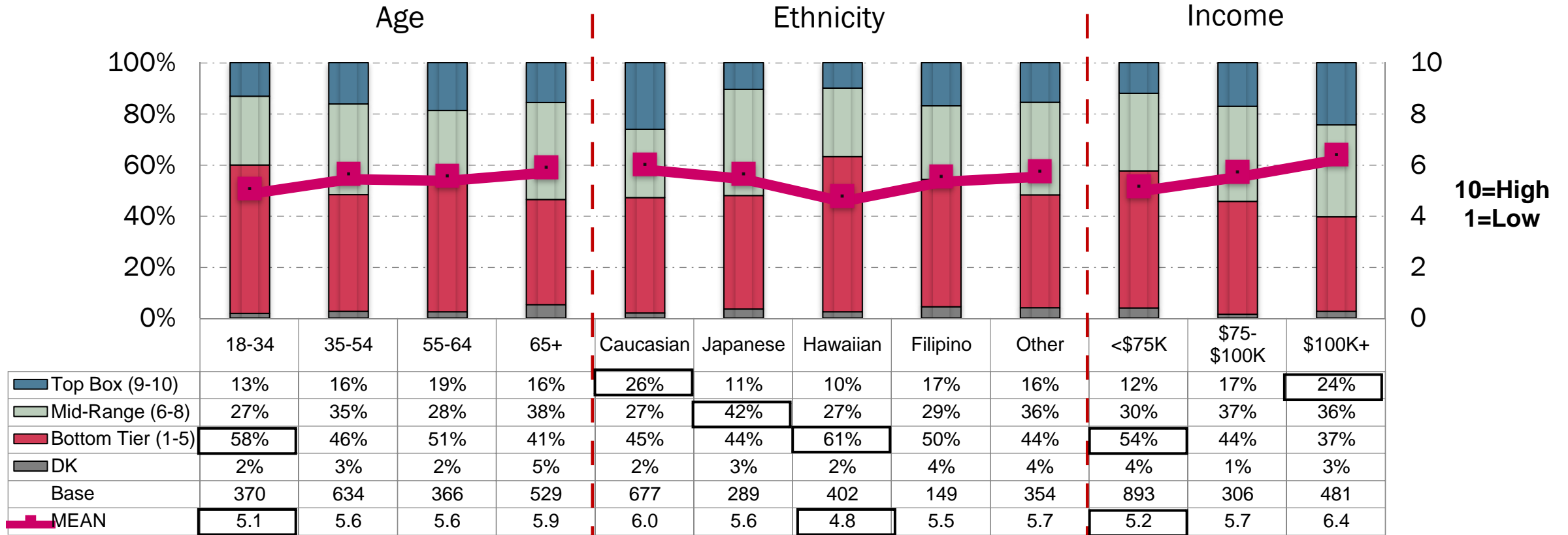
“Is an industry that enhances residents’ quality of life” – By Area (Hawai‘i Island & Kaua‘i)



Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

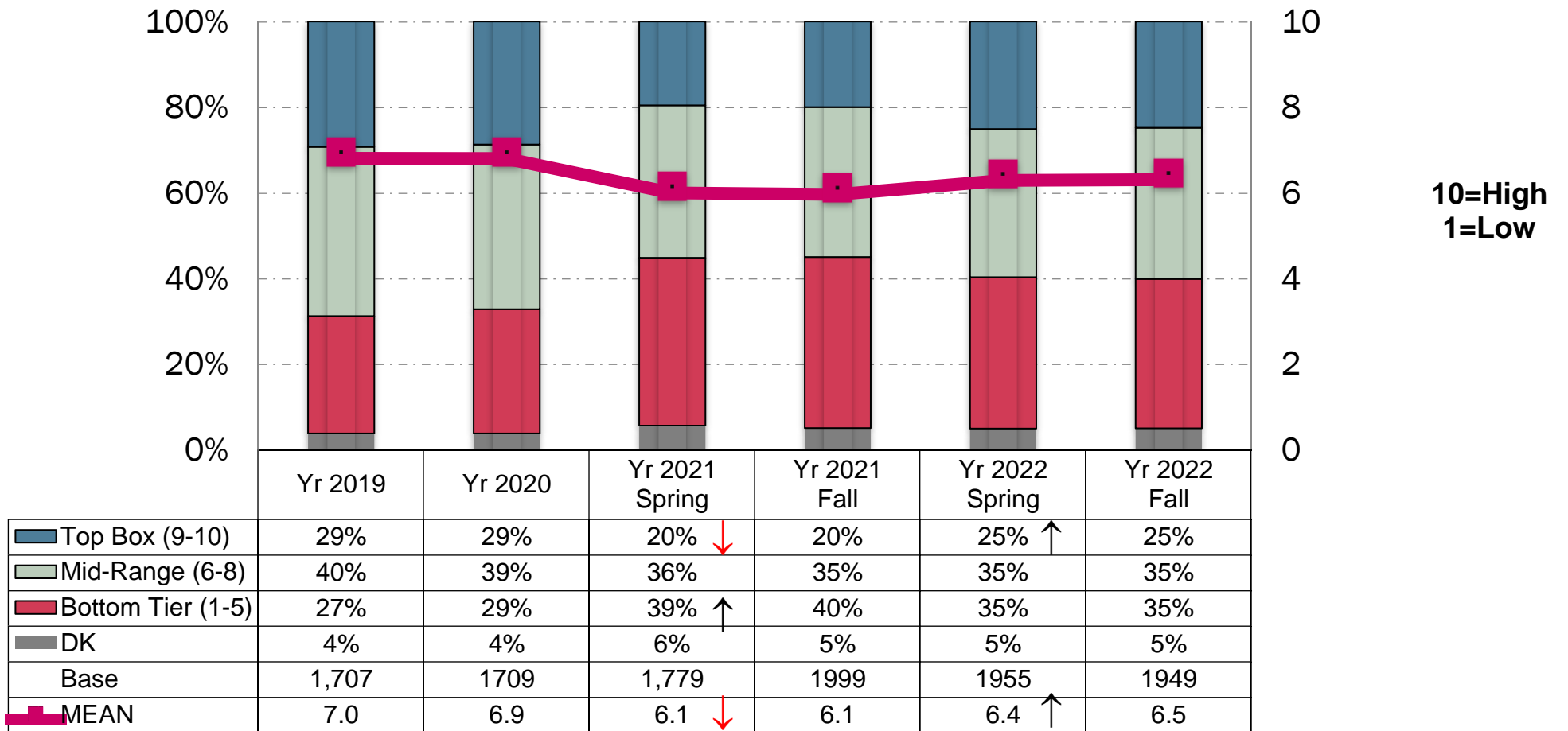
“Is an industry that enhances residents’ quality of life”

– *By Demographics*



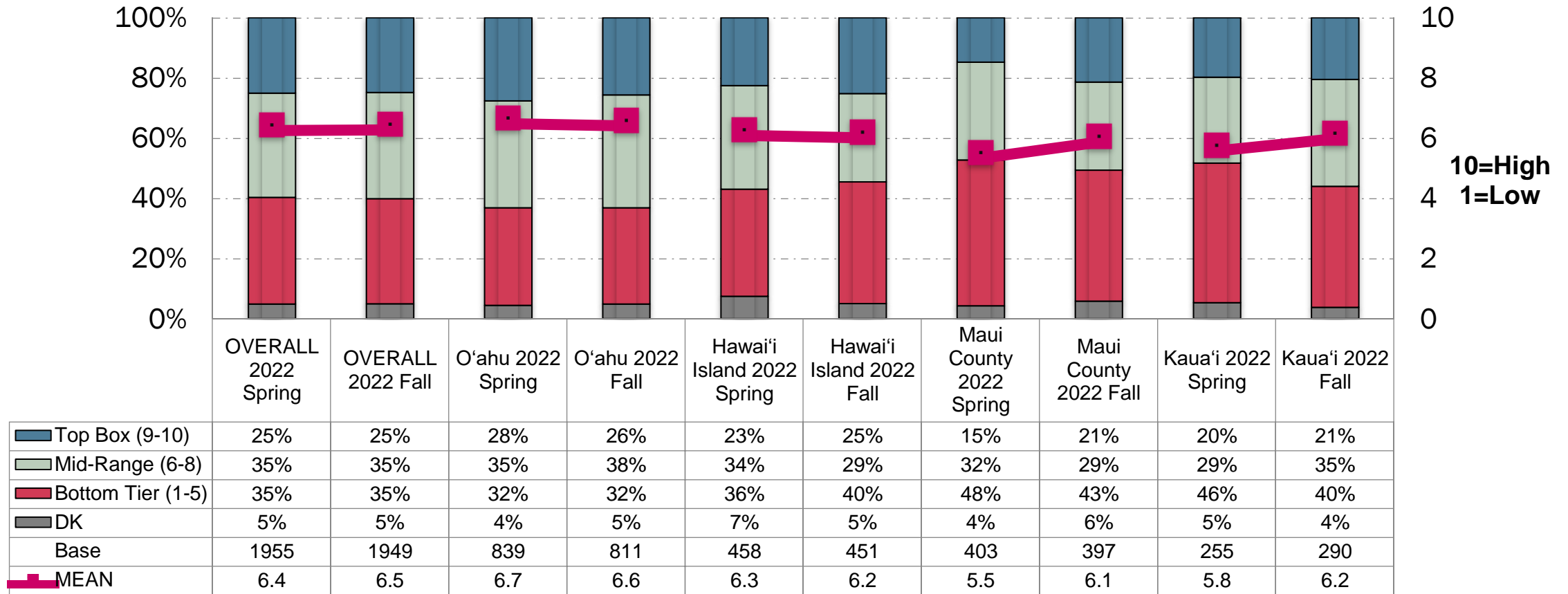
Q3.6. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Sponsors festivals, activities, & sports events for residents & visitors” - Overall



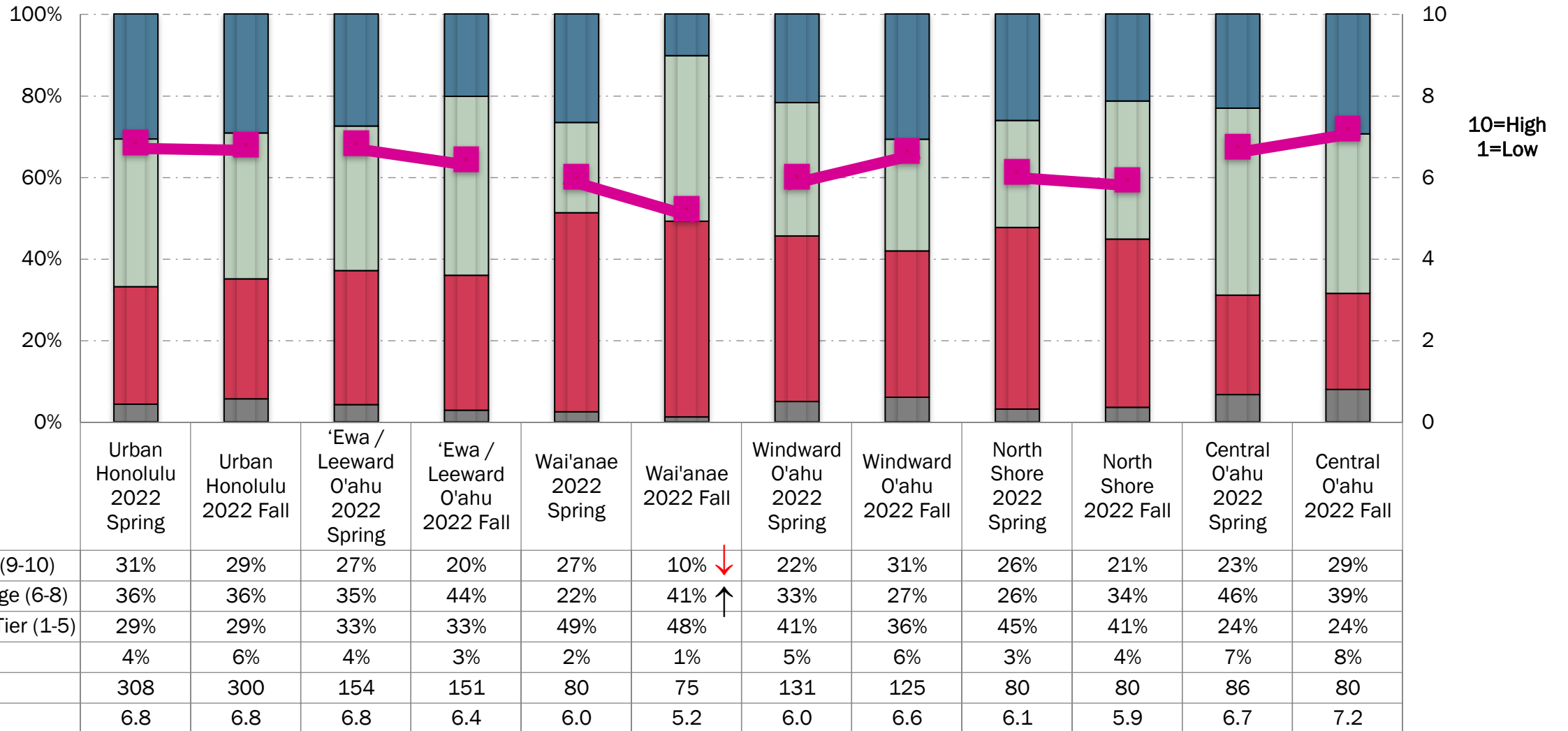
Q3.7. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Sponsors festivals, activities, & sports events for residents & visitors” – *By County*



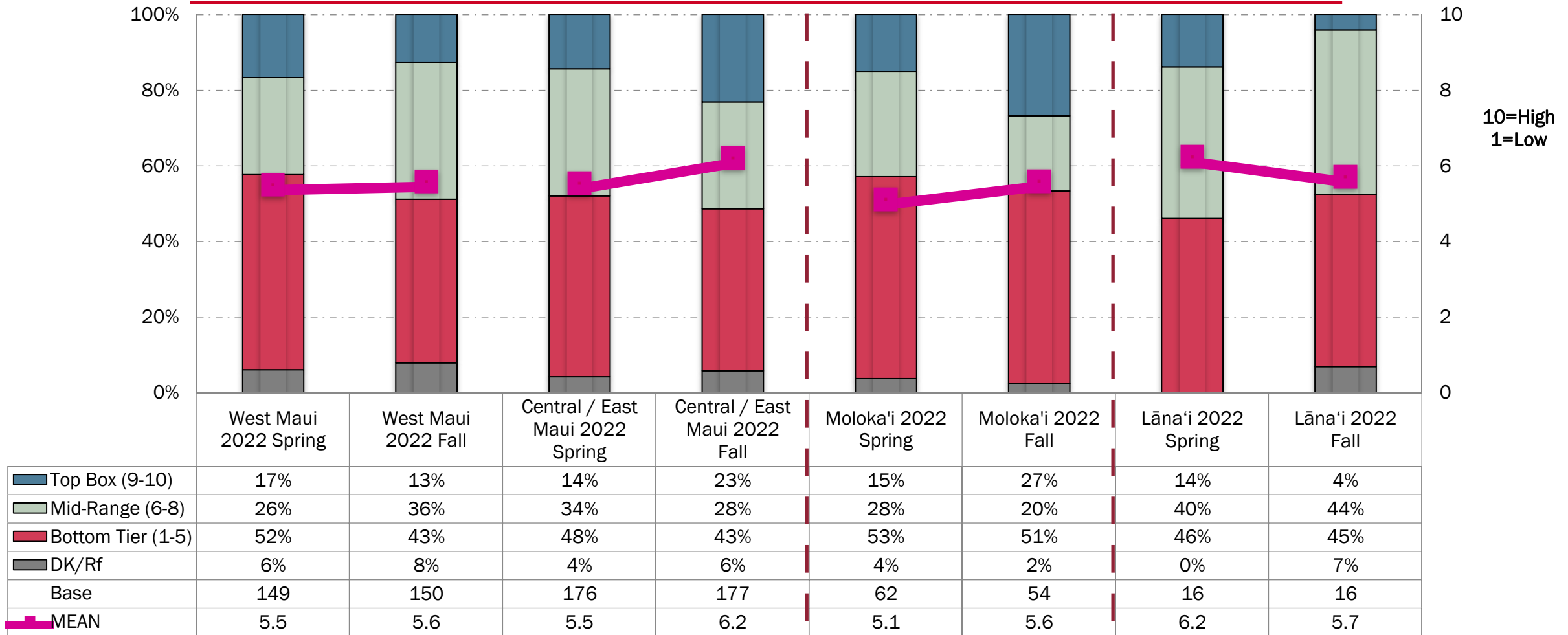
Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (O’ahu)*



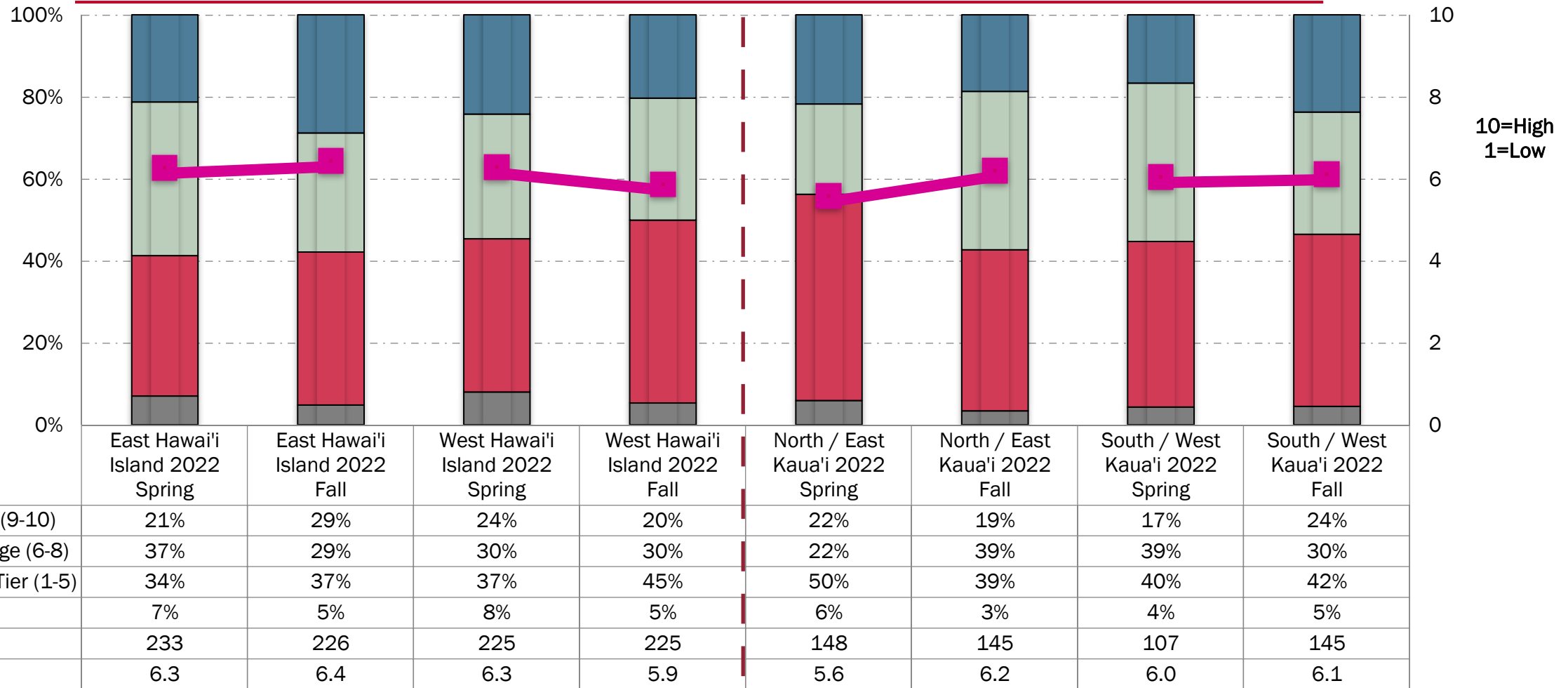
Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (Maui County)*



Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

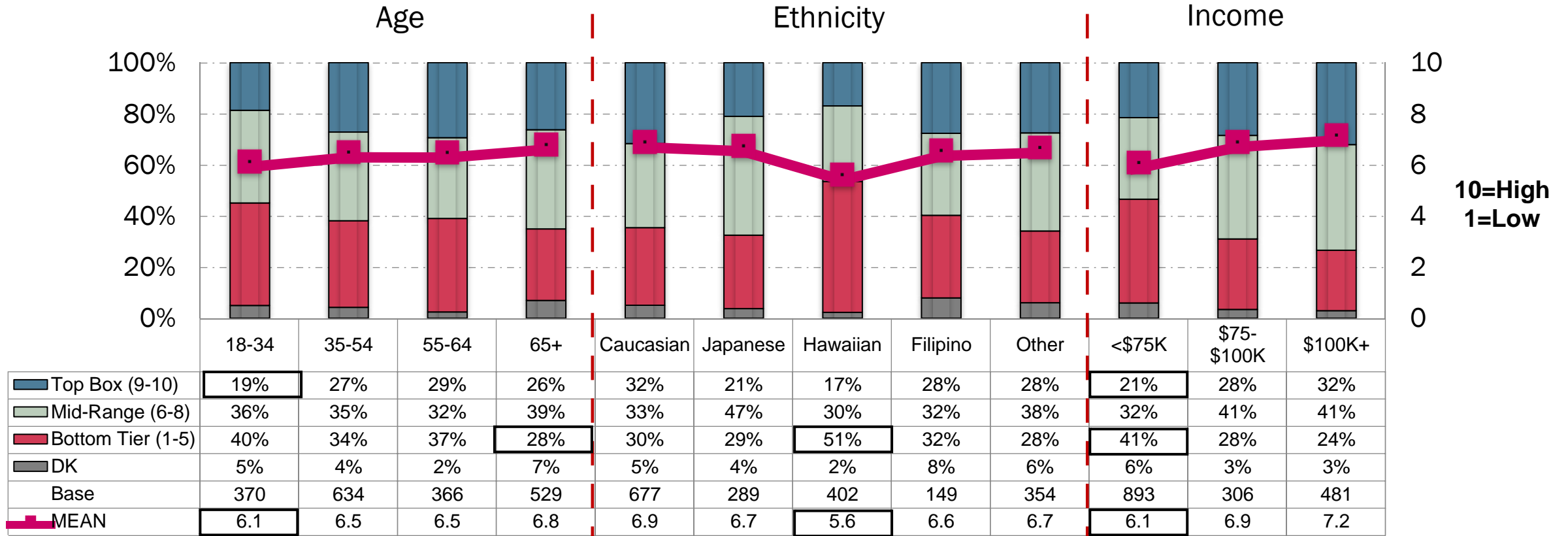
“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (Hawai‘i Island & Kaua‘i)*



Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

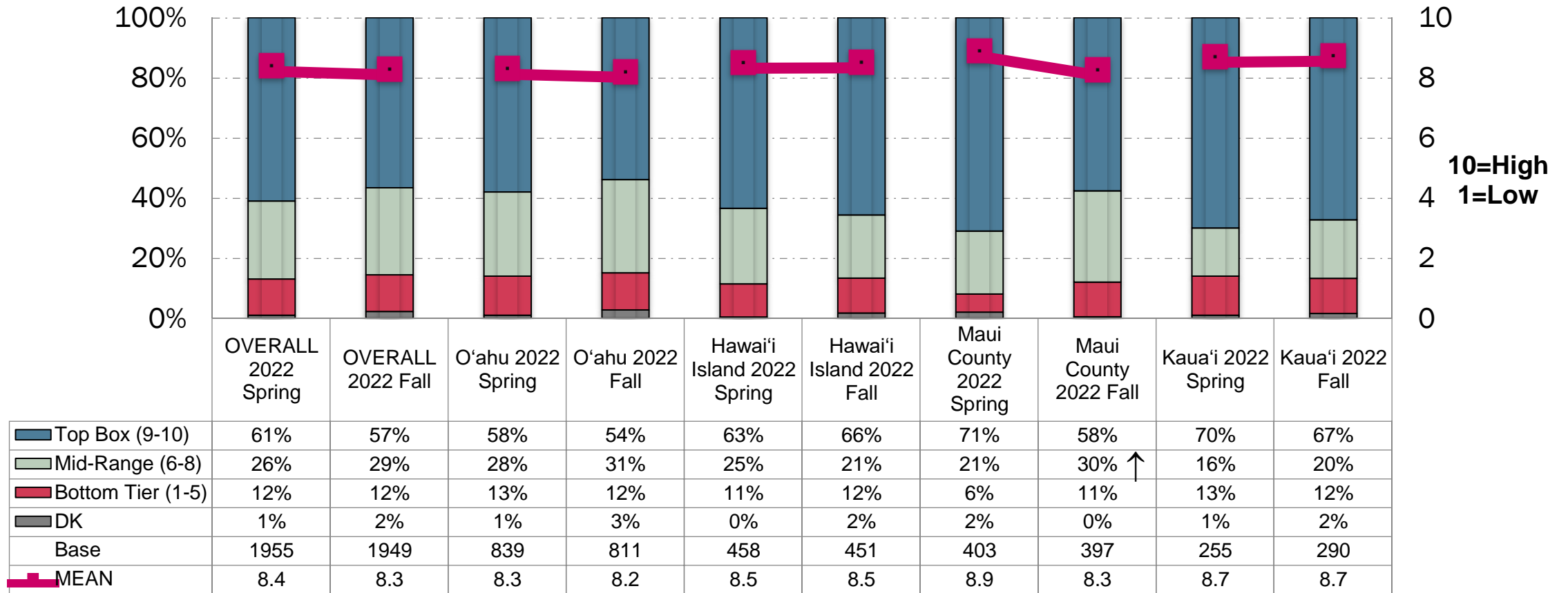
“Sponsors festivals, activities & sports events for residents & visitors”

– *By Demographics*



Q3.7. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

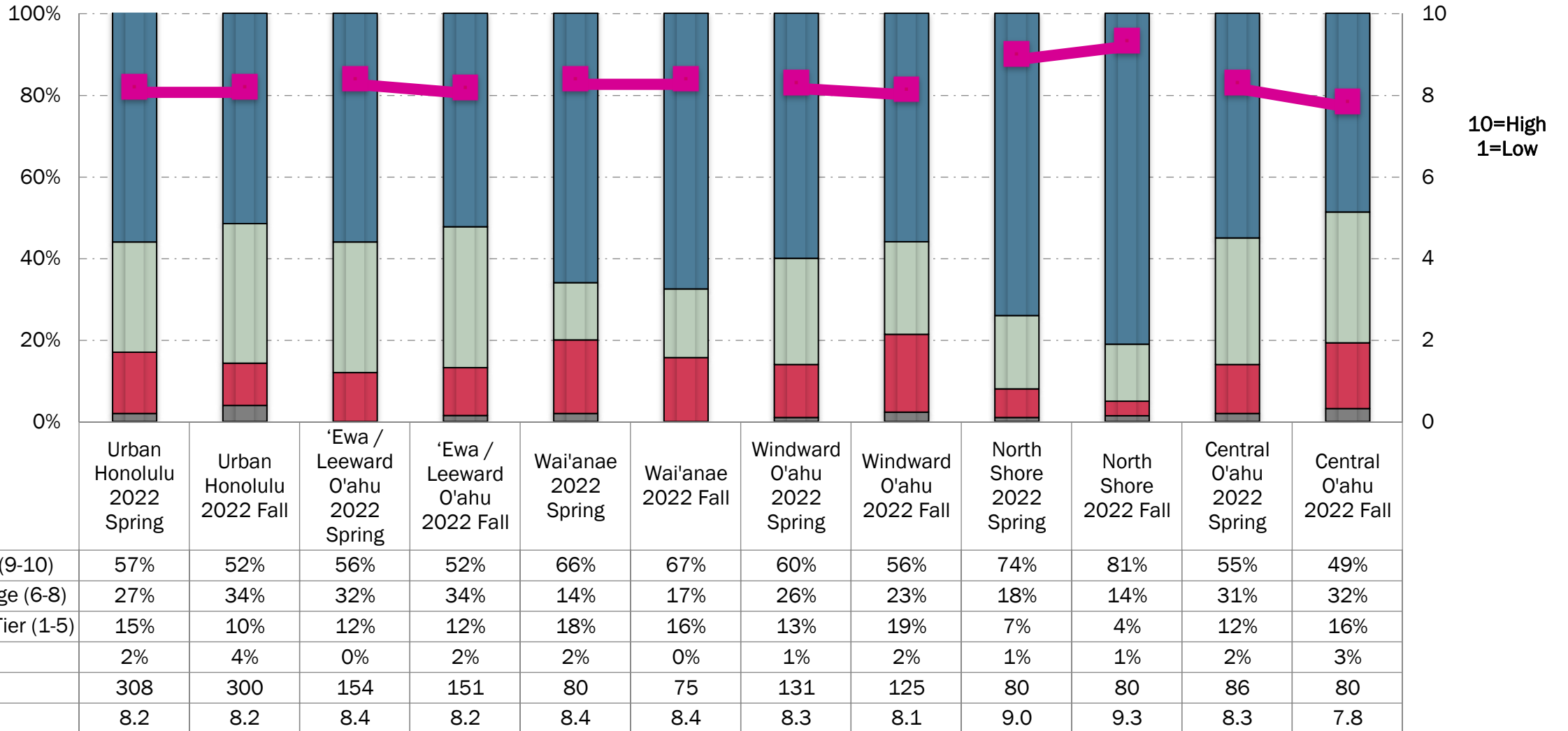
“Authentic presentation of Native Hawaiian language and culture is important” – *By County*



Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

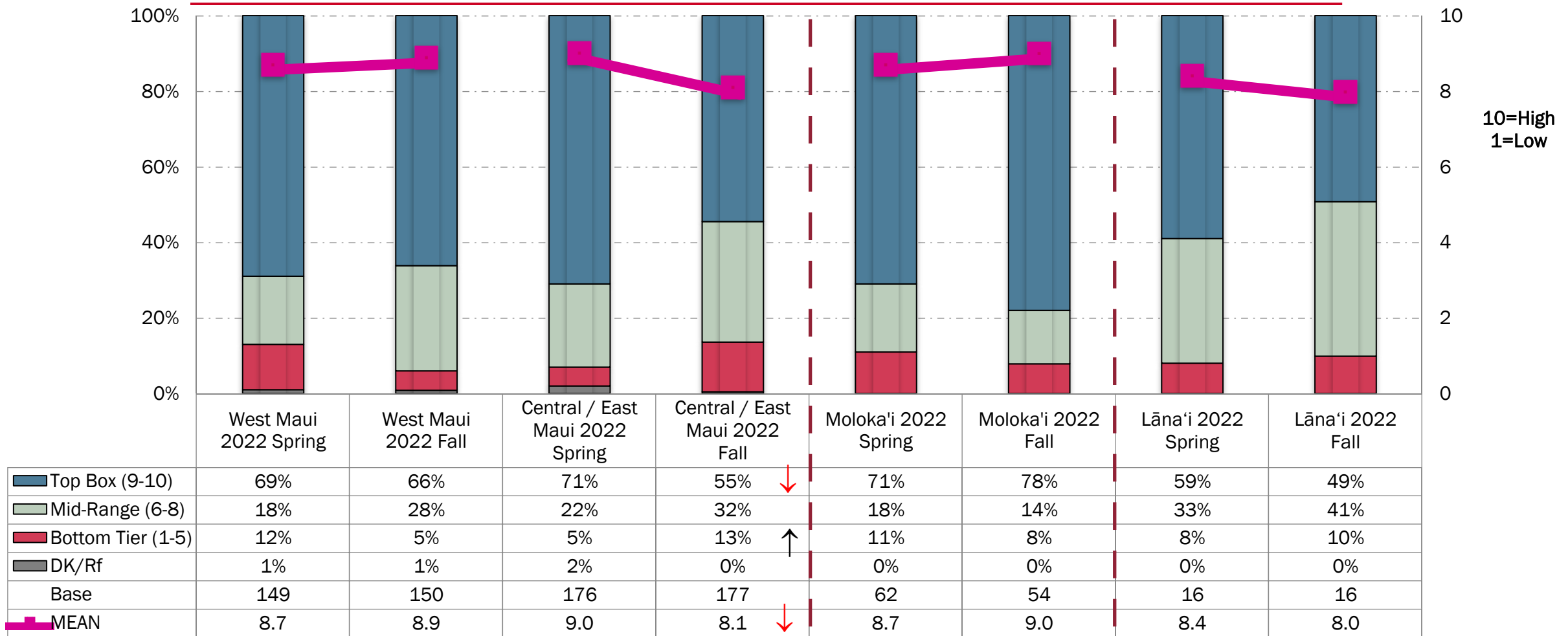
“Authentic presentation of Native Hawaiian language and culture is important.”

– *By Area (O’ahu)*



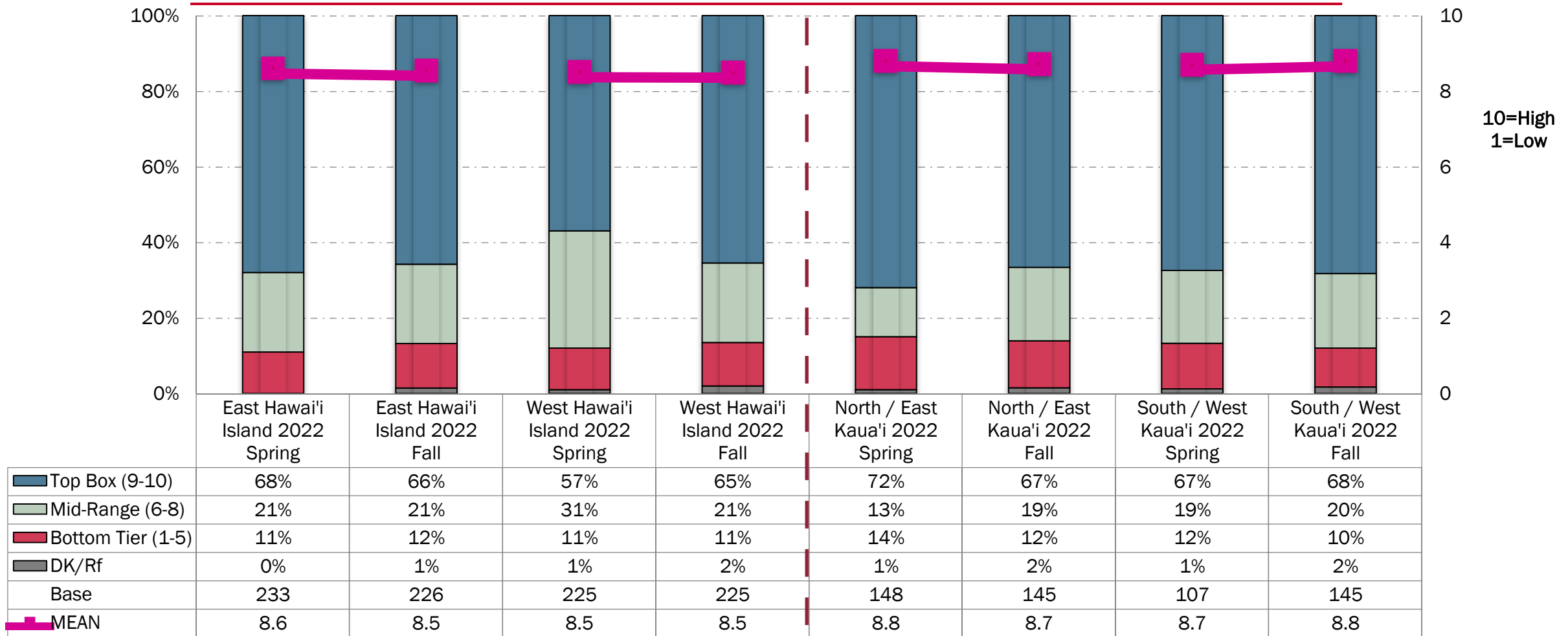
“Authentic presentation of Native Hawaiian language and culture is important.”

– *By Area (Maui County)*

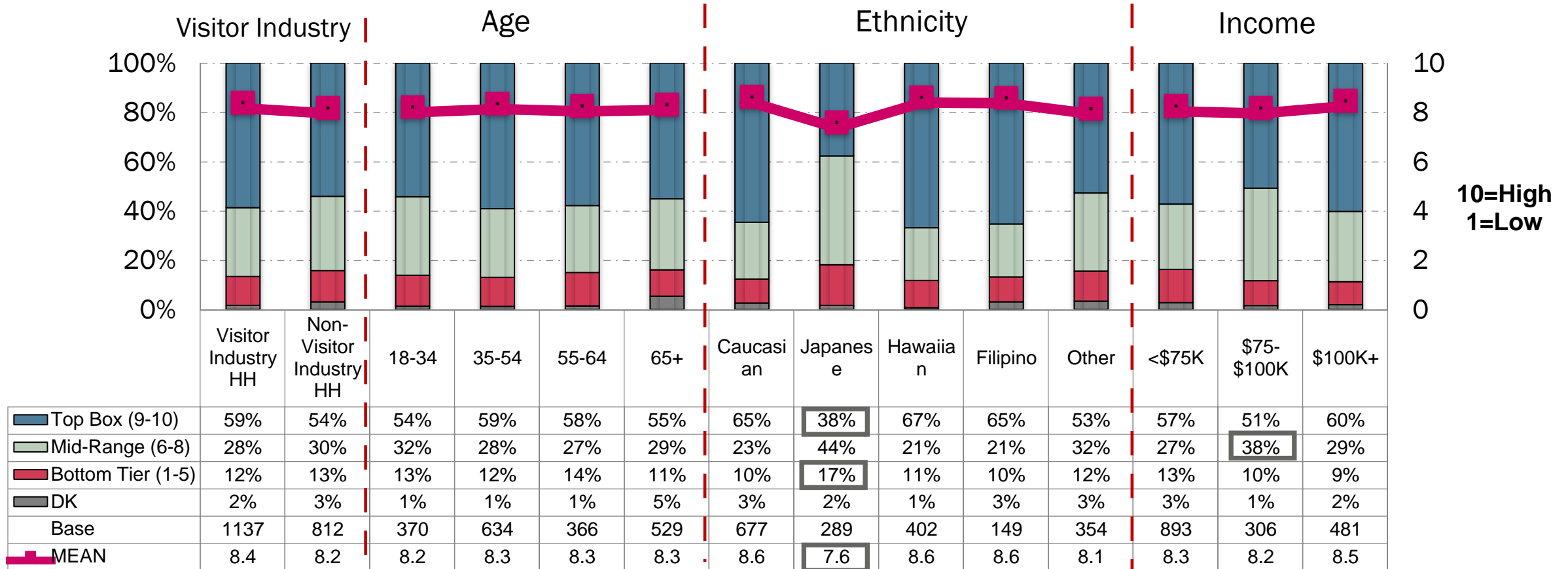


“Authentic presentation of Native Hawaiian language and culture is important.”

– *By Area (Hawai‘i Island & Kaua‘i)*

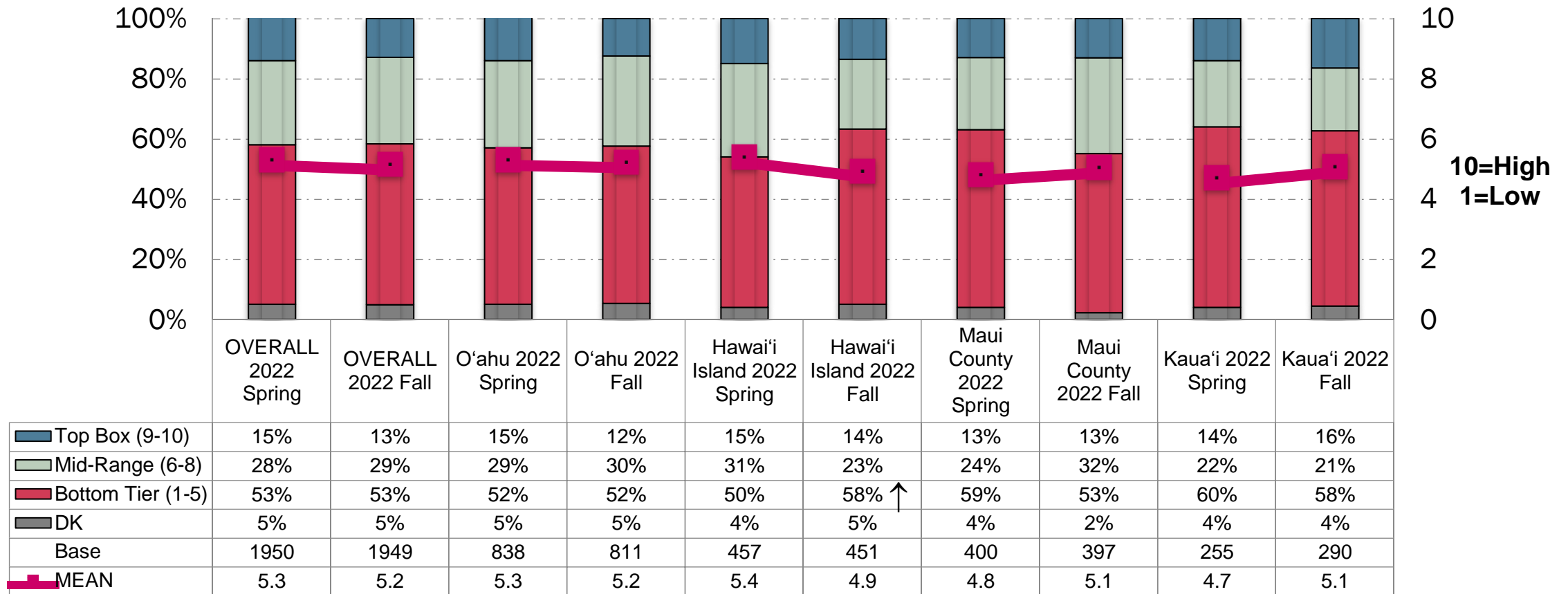


“Authentic presentation of Native Hawaiian language and culture is important.” – *By Demographics*



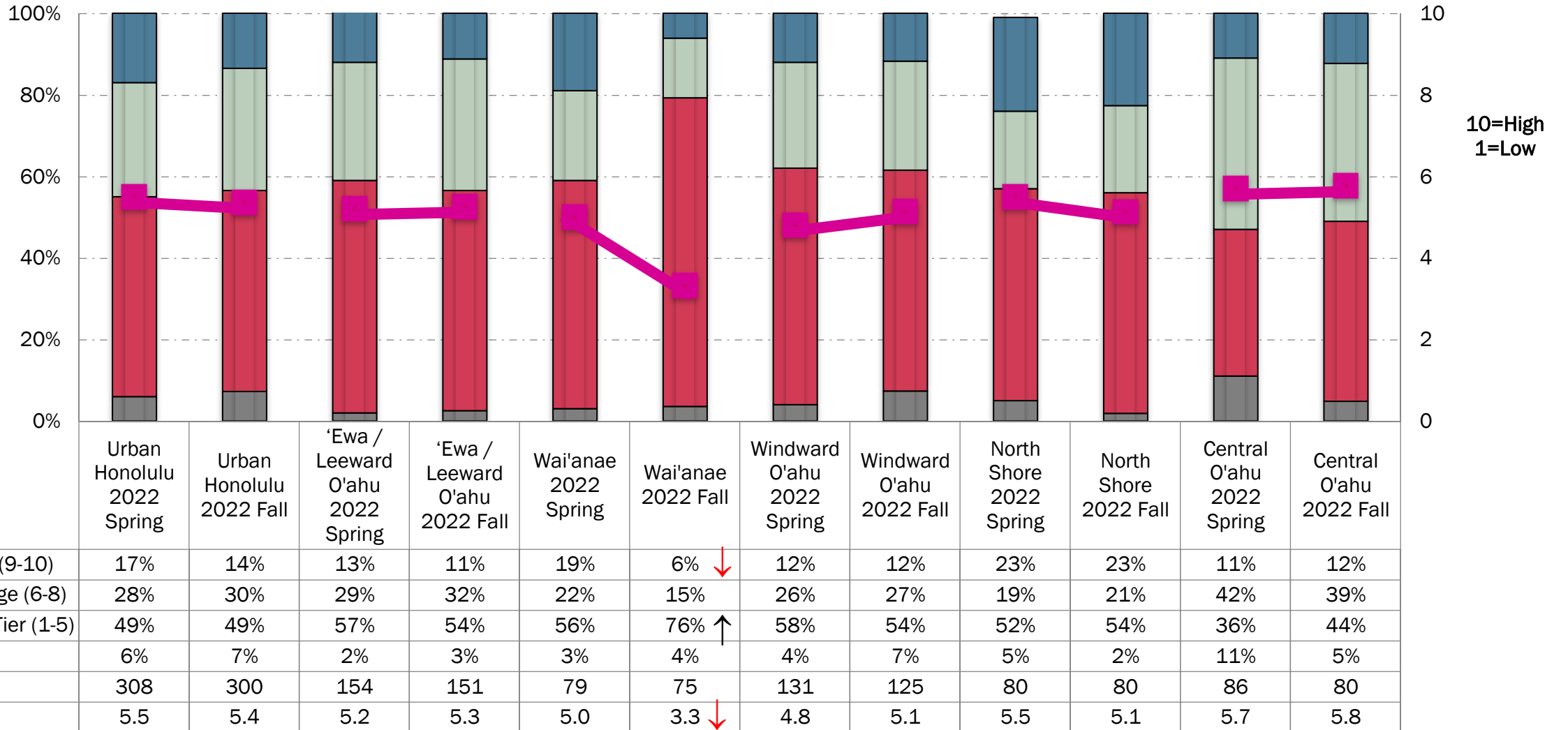
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By County*

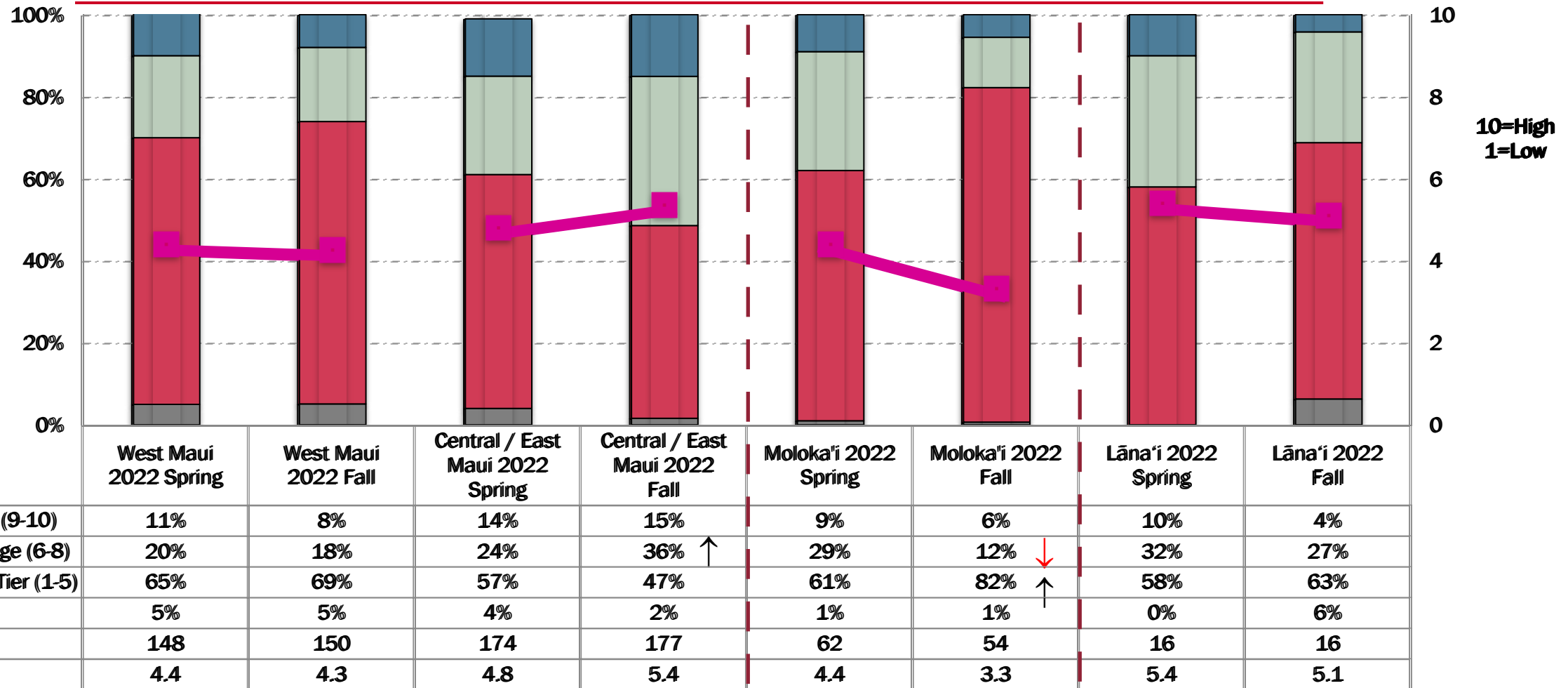


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

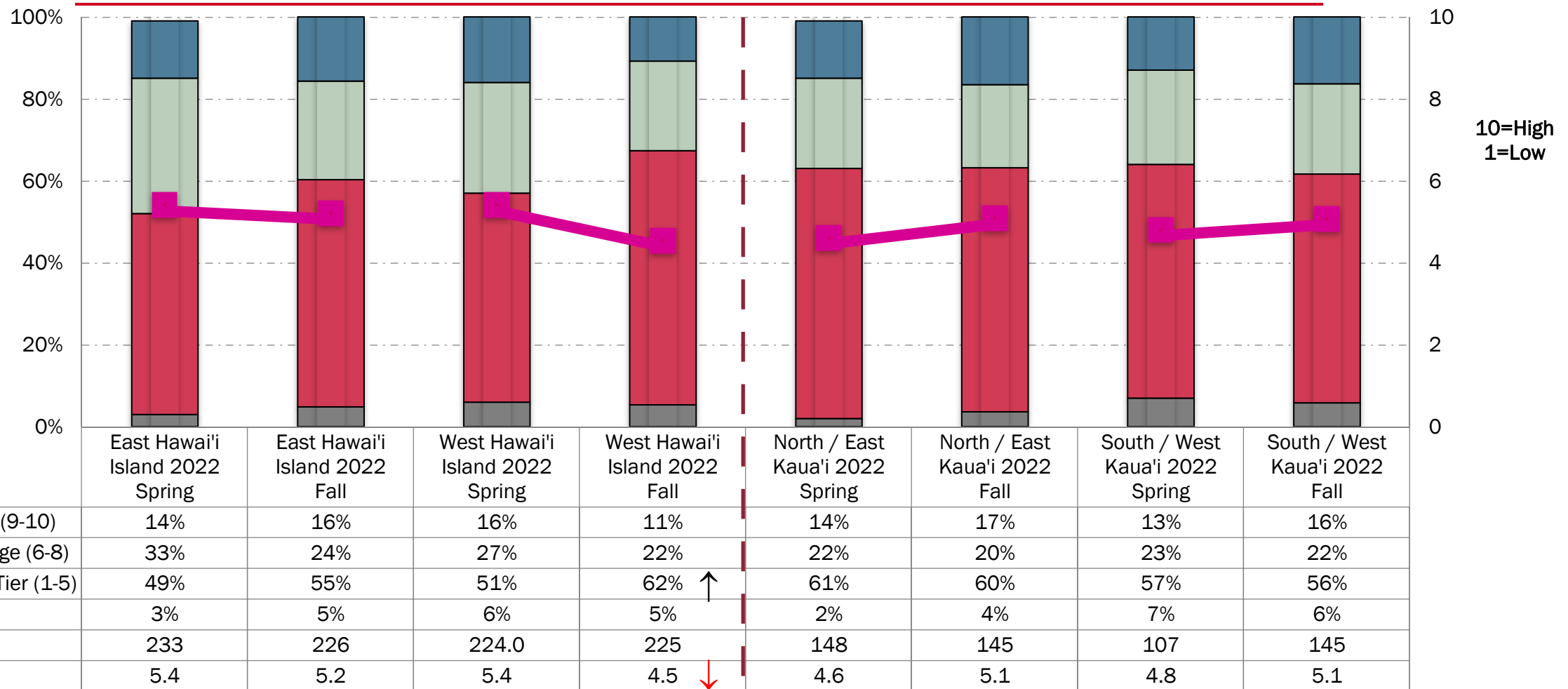
“Tourism contributes to the perpetuation of Native Hawaiian culture and language.” – *By Area (O’ahu)*



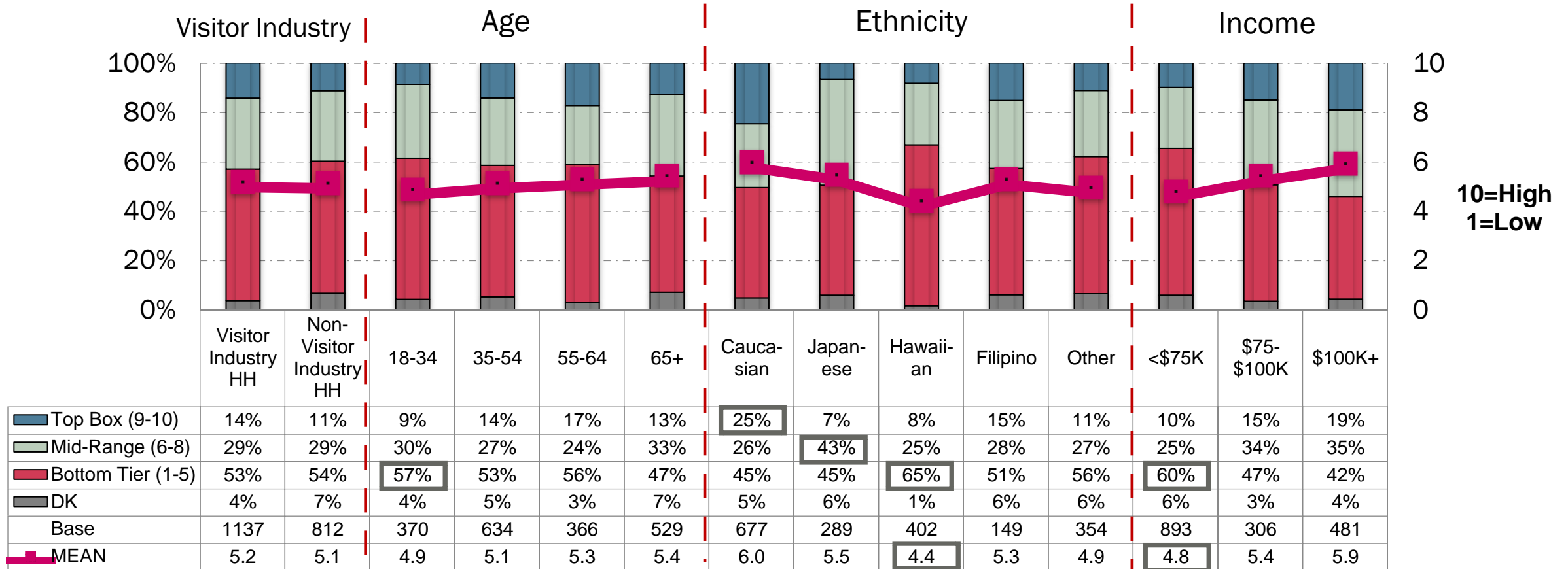
“Tourism contributes to the perpetuation of Native Hawaiian culture and language.” – *By Area (Maui County)*



“Tourism contributes to the perpetuation of Native Hawaiian culture and language.” – *By Area (Hawai‘i Island & Kaua‘i)*

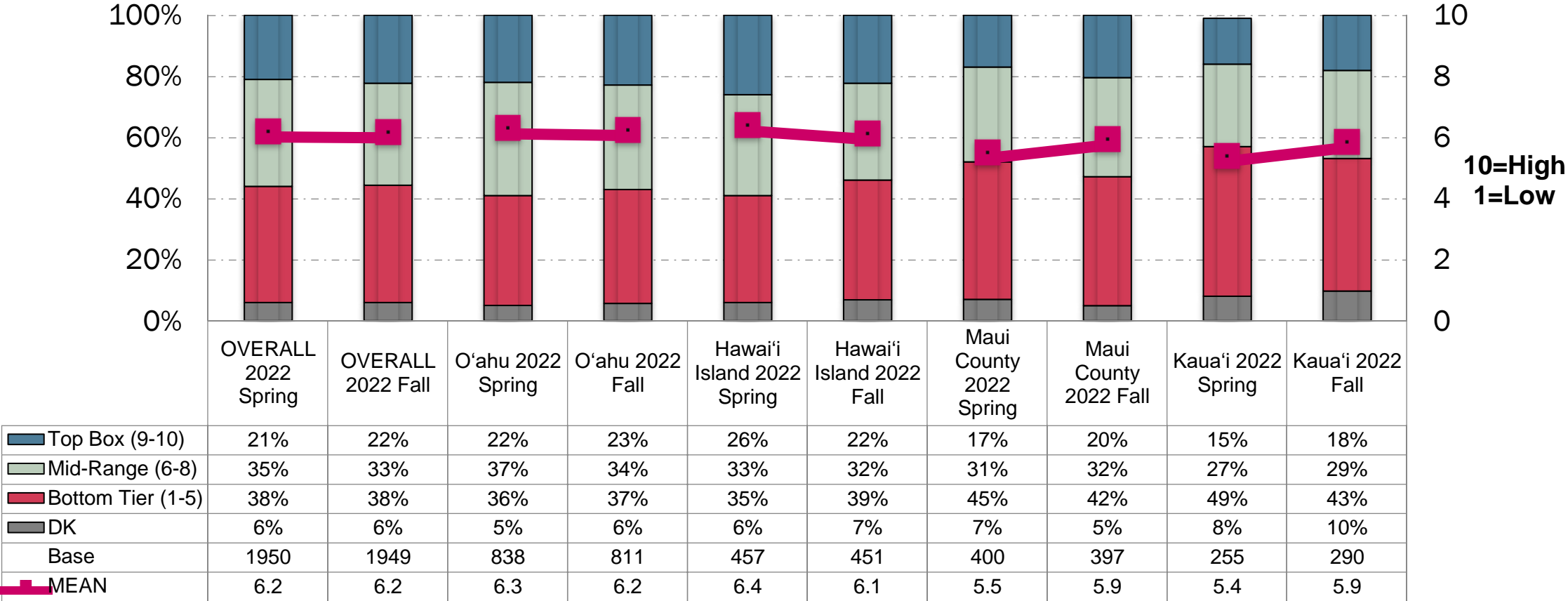


“Tourism contributes to the perpetuation of Native Hawaiian culture and language.” – *By Demographics*



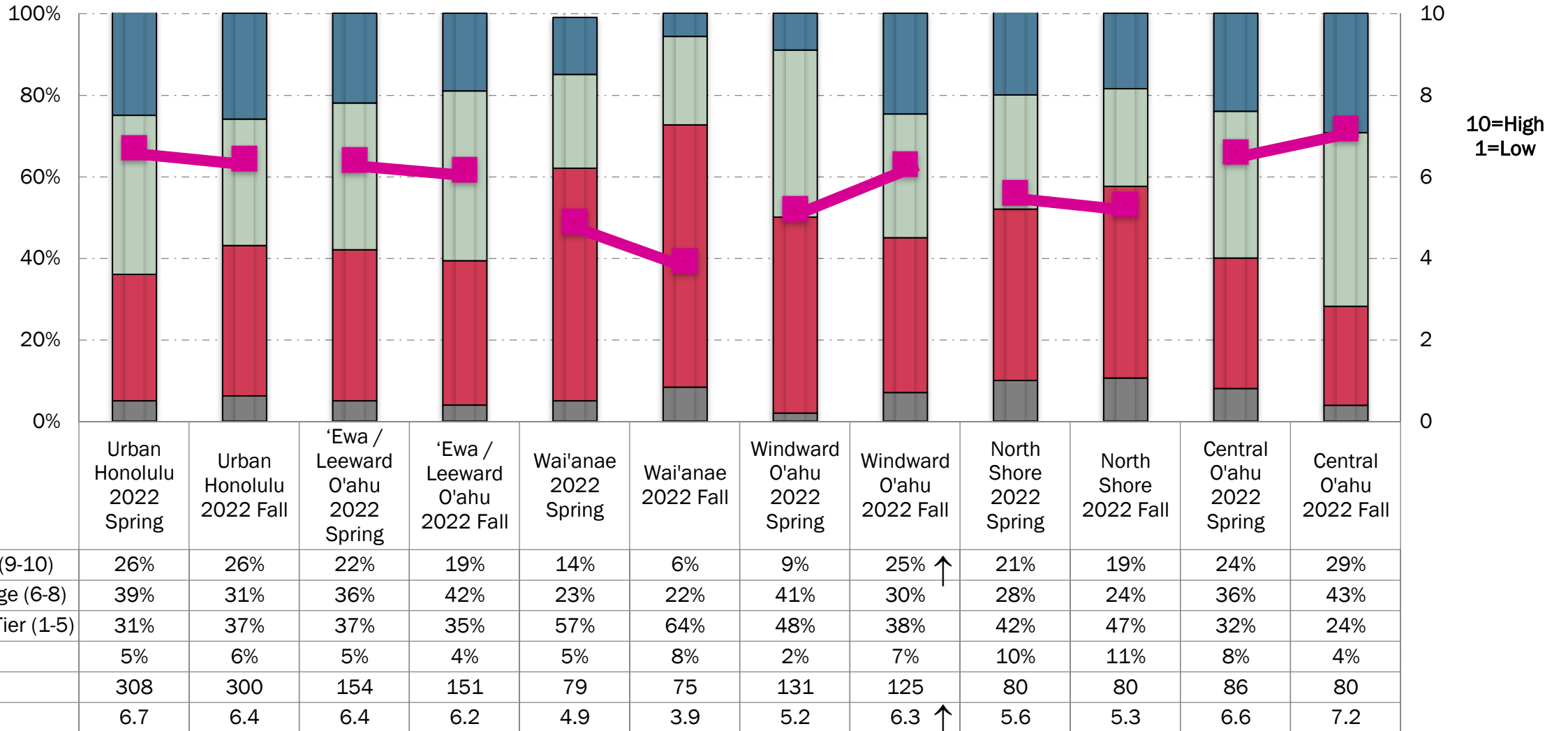
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism helps fund the stewardship of Hawai’i’s natural resources, parks and cultural sites” – *By County*

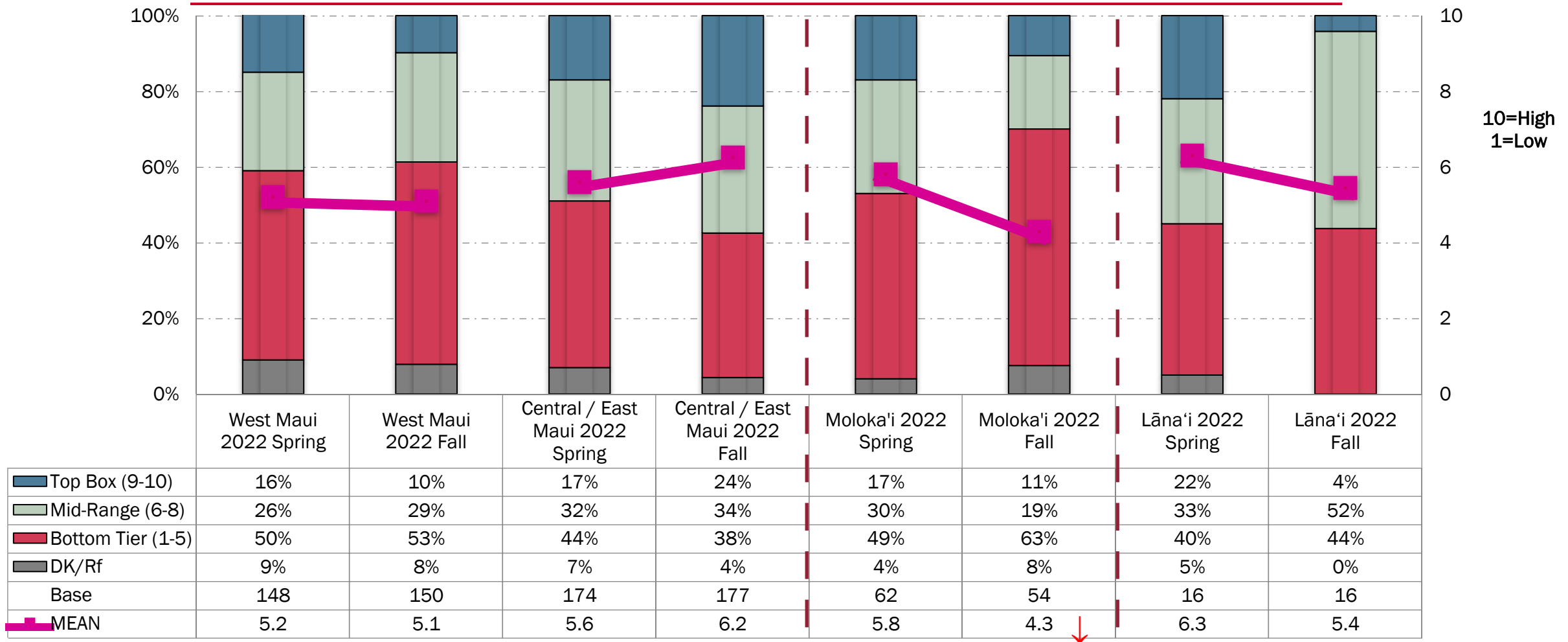


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

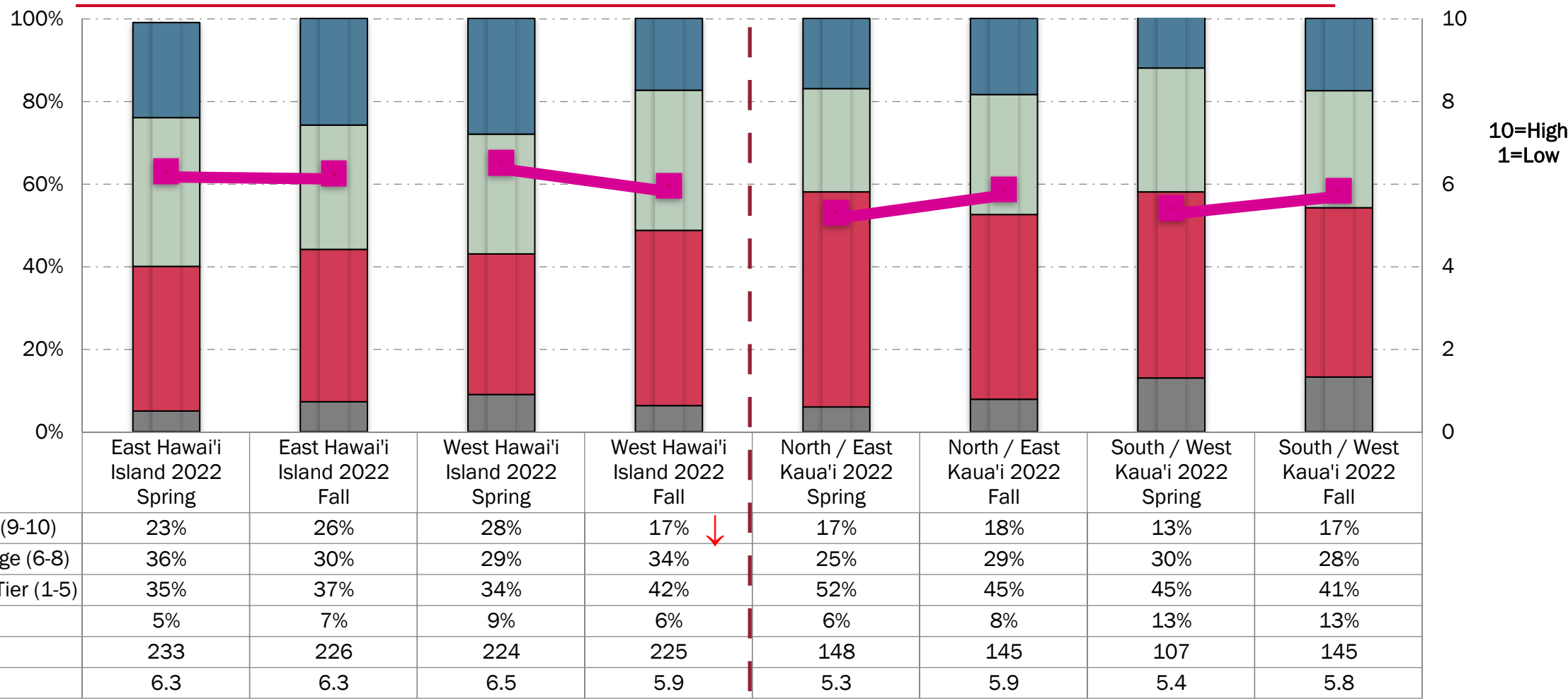
“Tourism helps fund the stewardship of Hawai’i’s natural resources, parks and cultural sites.” – *By Area (O’ahu)*



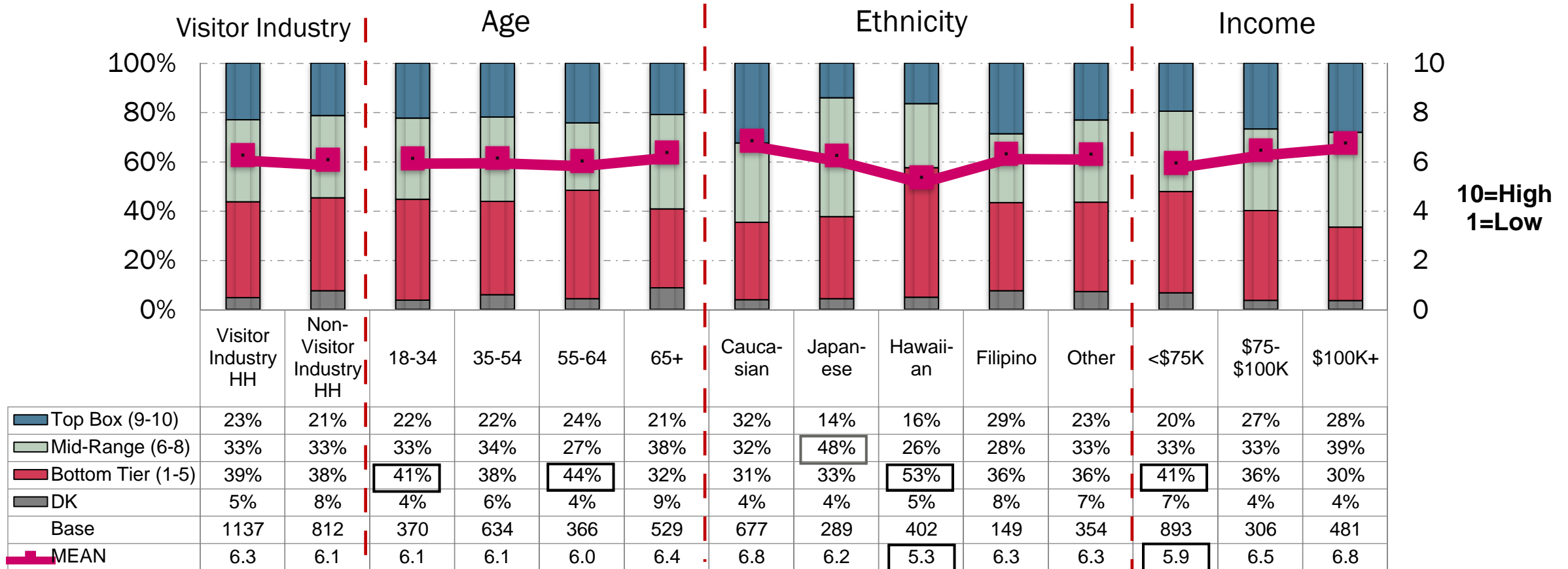
“Tourism helps fund the stewardship of Hawai’i’s natural resources, parks and cultural sites.” – *By Area (Maui County)*



“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites.” – *By Area (Hawai‘i Island & Kaua‘i)*

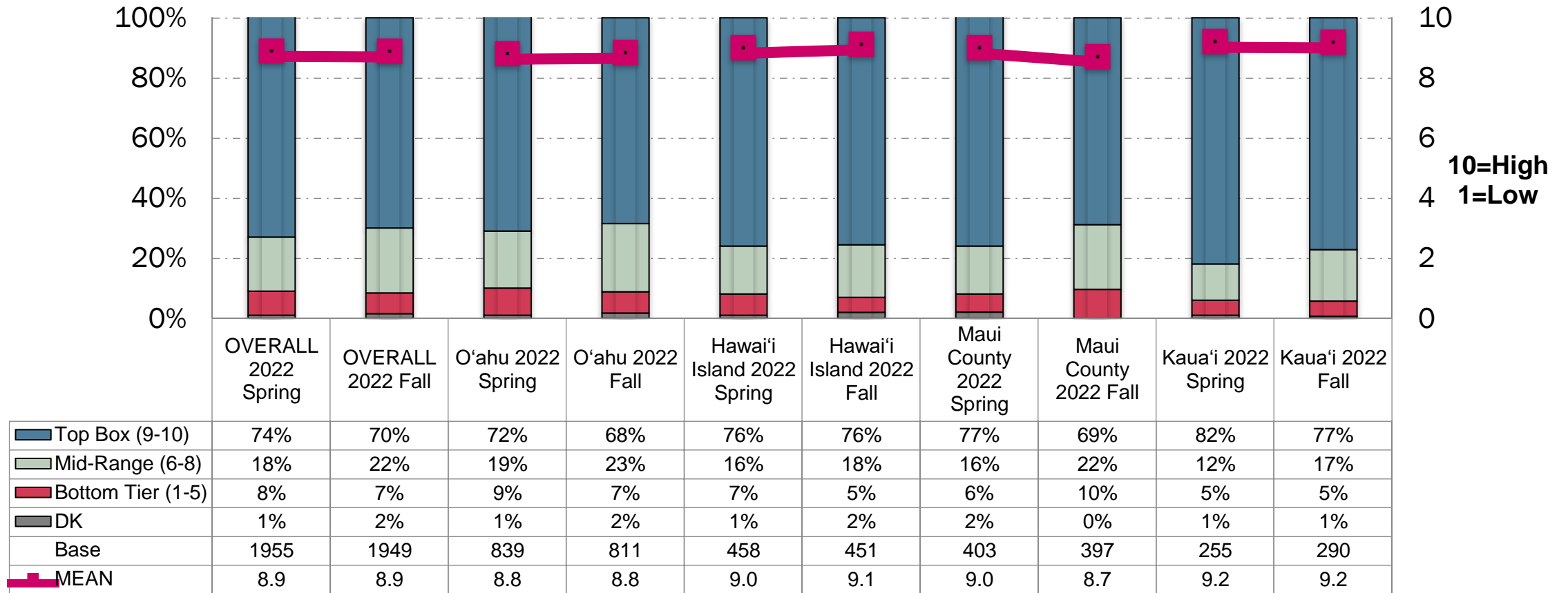


“Tourism helps fund the stewardship of Hawai’i’s natural resources, parks and cultural sites.” – *By Demographics*



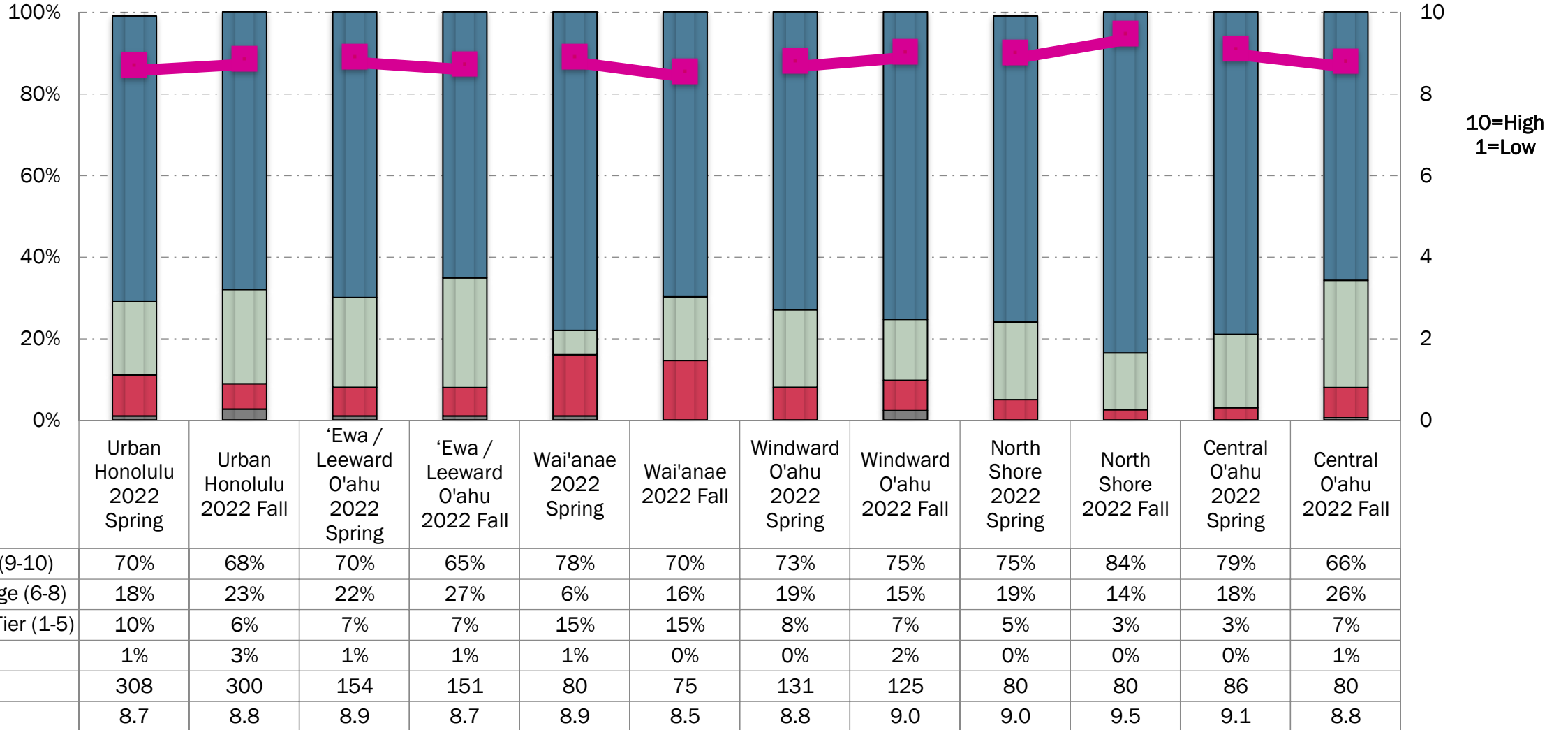
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Visitors need to be educated about protecting Hawai‘i’s natural environment and cultural resources.” – *By County*

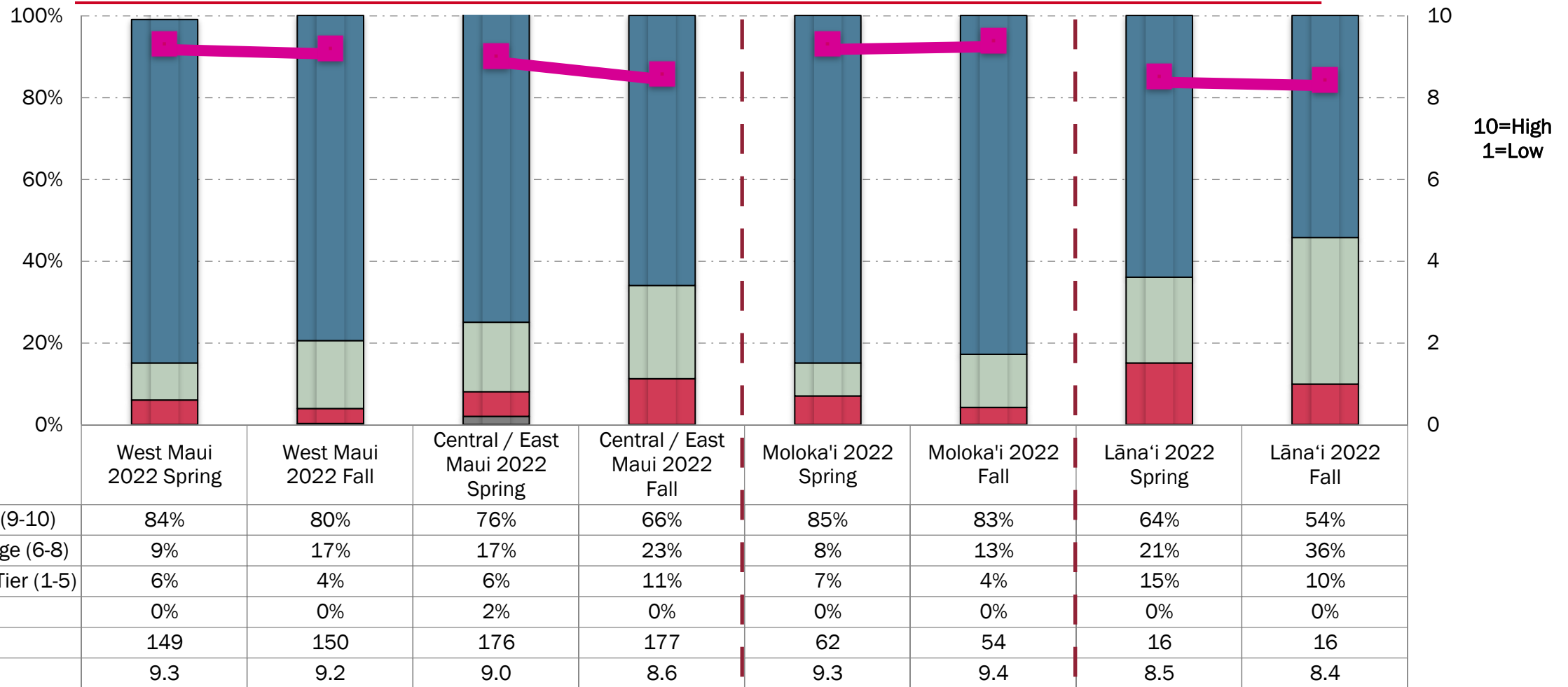


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

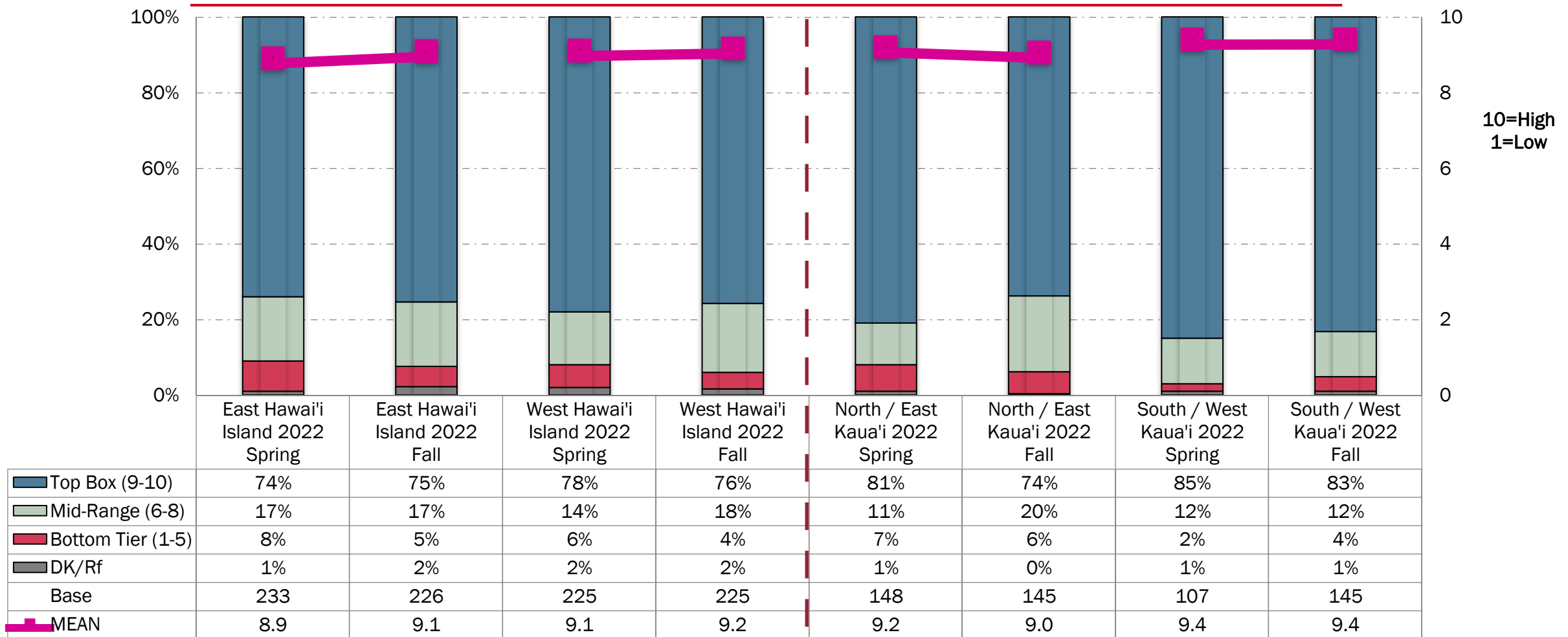
“Visitors need to be educated about protecting Hawai’i’s natural environment and cultural resources.” – *By Area (O’ahu)*



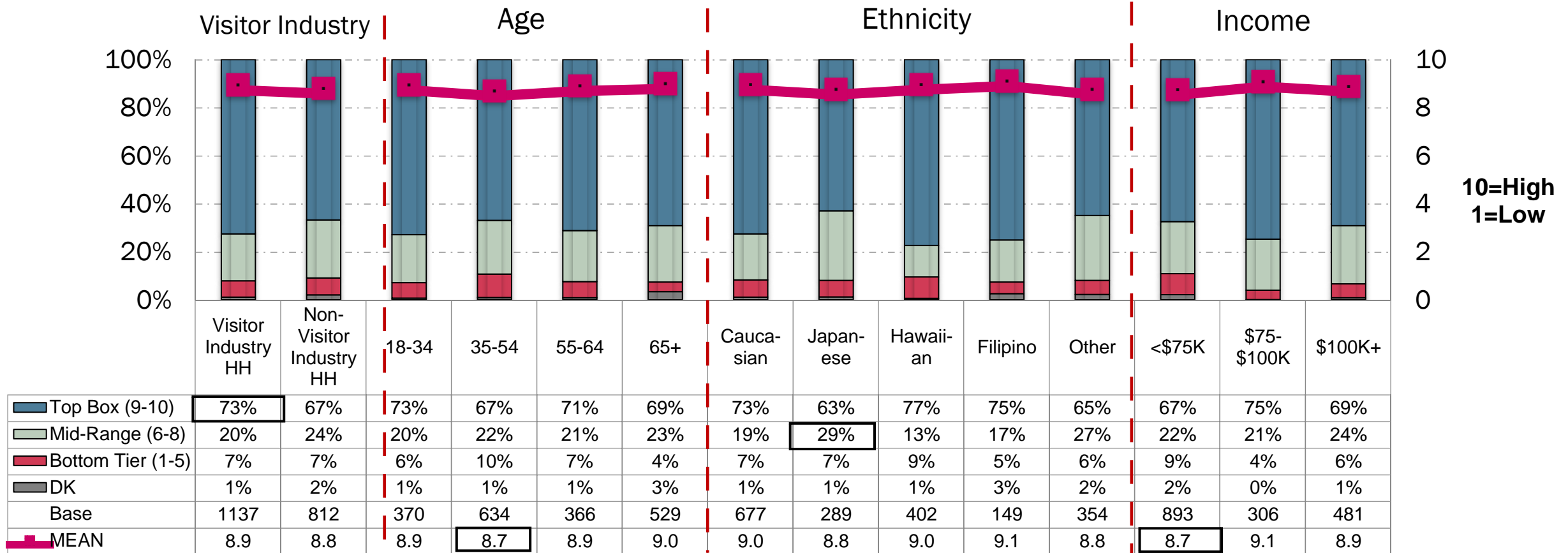
“Visitors need to be educated about protecting Hawai’i’s natural environment and cultural resources.” – *By Area (Maui County)*



“Visitors need to be educated about protecting Hawai‘i’s natural environment and cultural resources.” – *By Area (Hawai‘i Island & Kaua‘i)*



“Visitors need to be educated about protecting Hawai‘i’s natural environment and cultural resources.” – *By Demographics*



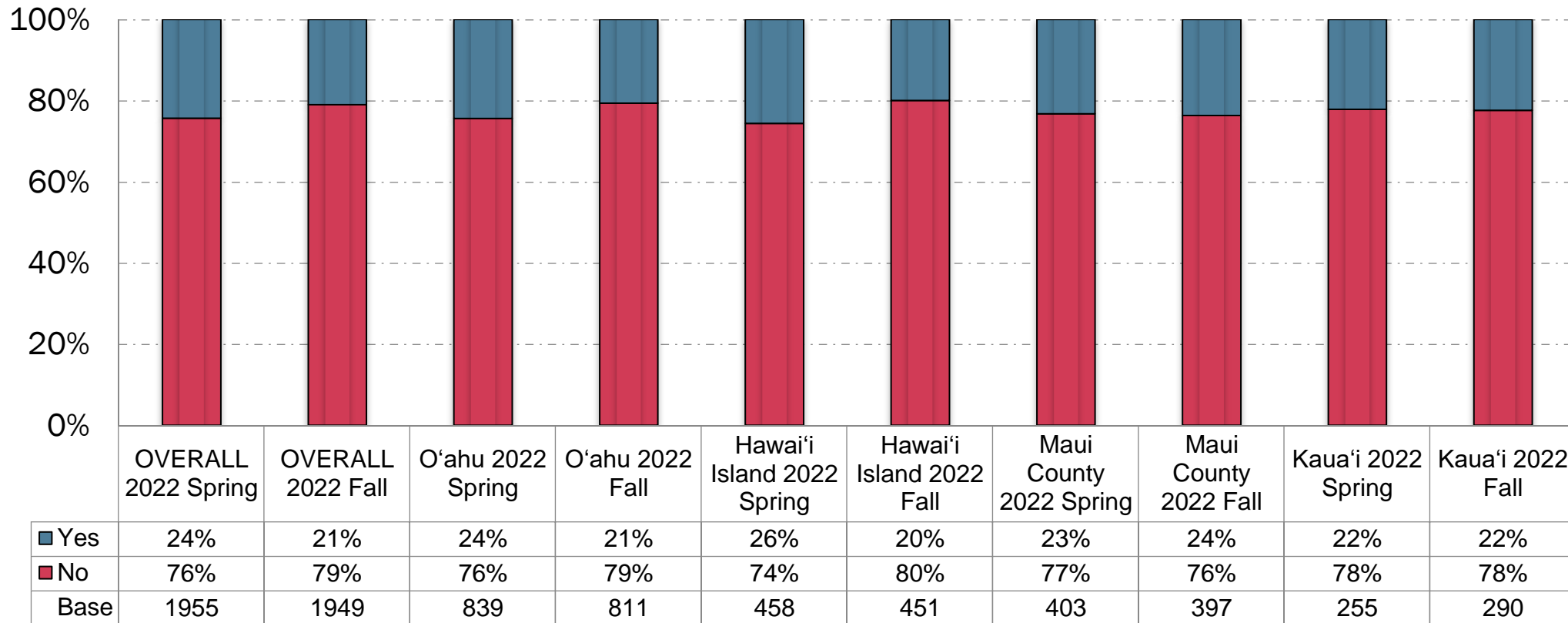
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



Destination Management Action Plans (DMAP) (Spring-Fall 2022)

“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)”

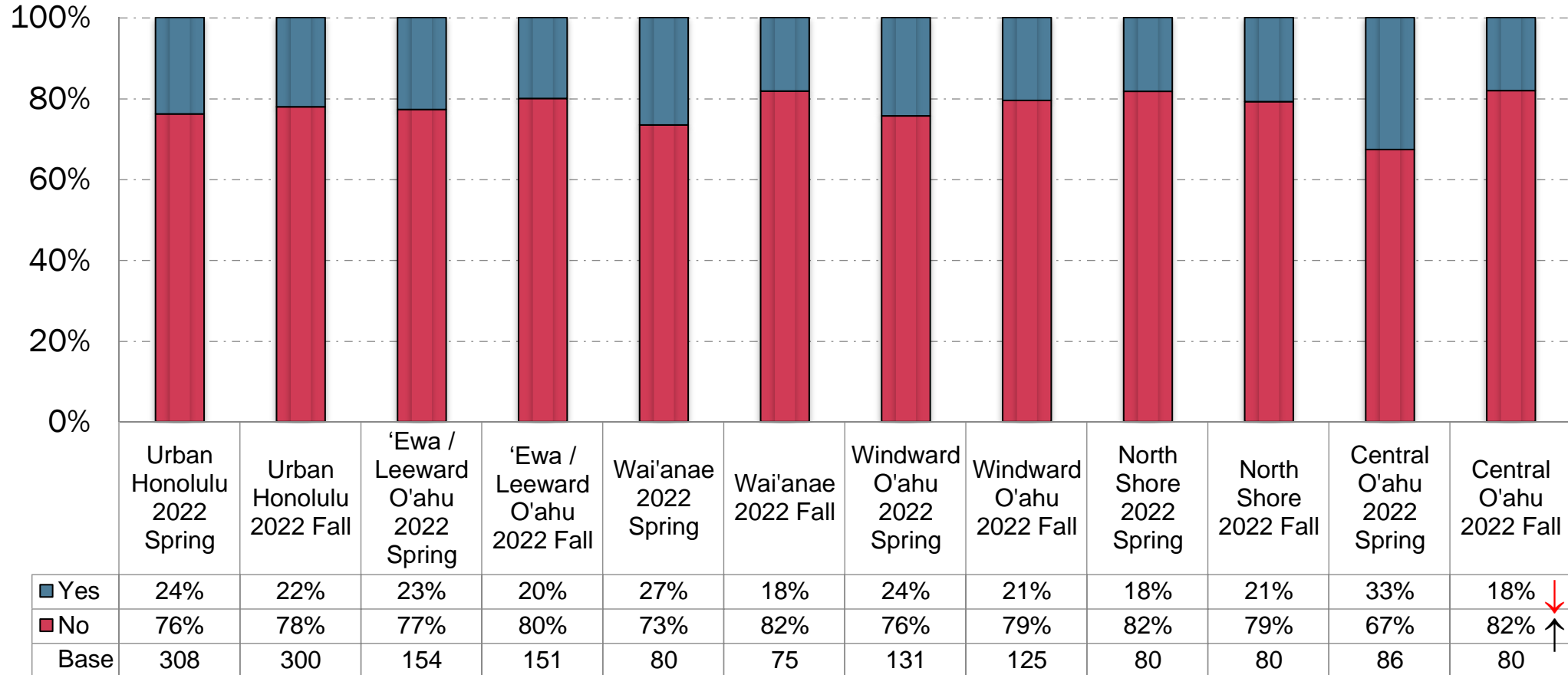
– *By County*



Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)”

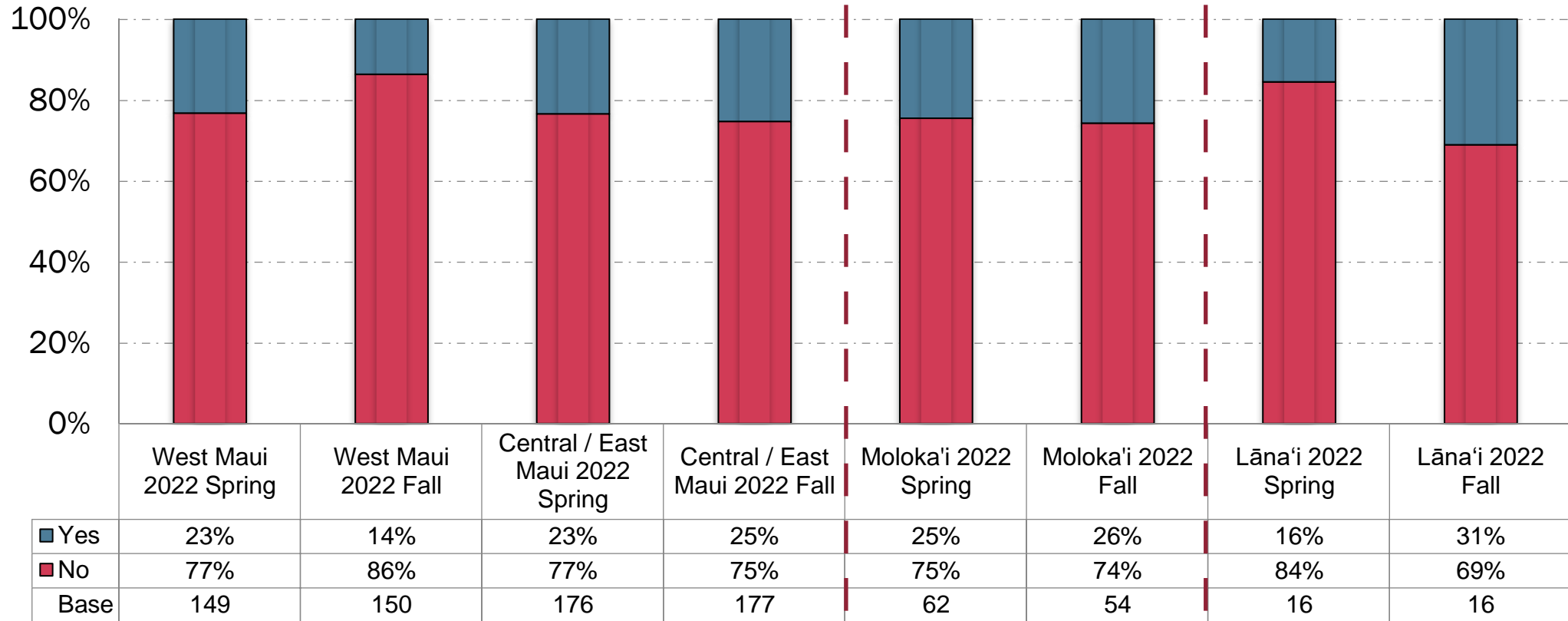
– *By Area (O‘ahu)*



Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

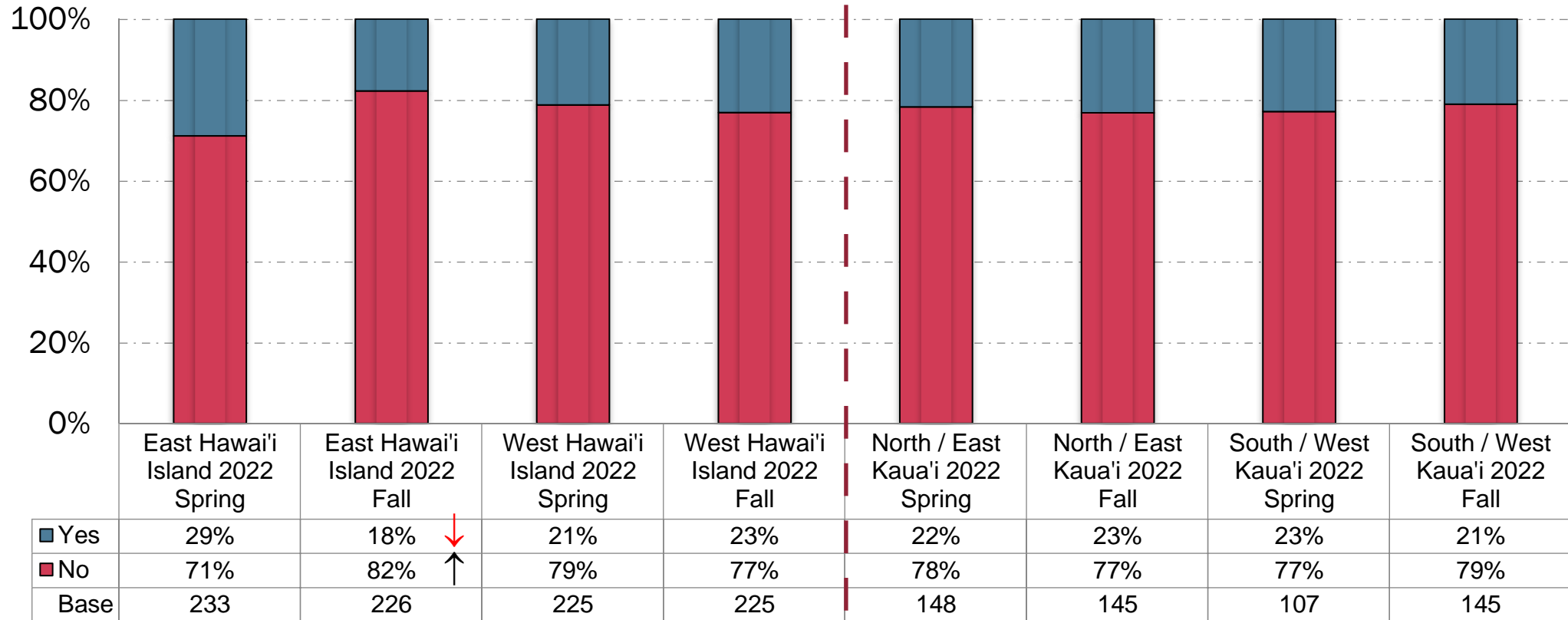
“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)”

– *By Area (Maui County)*



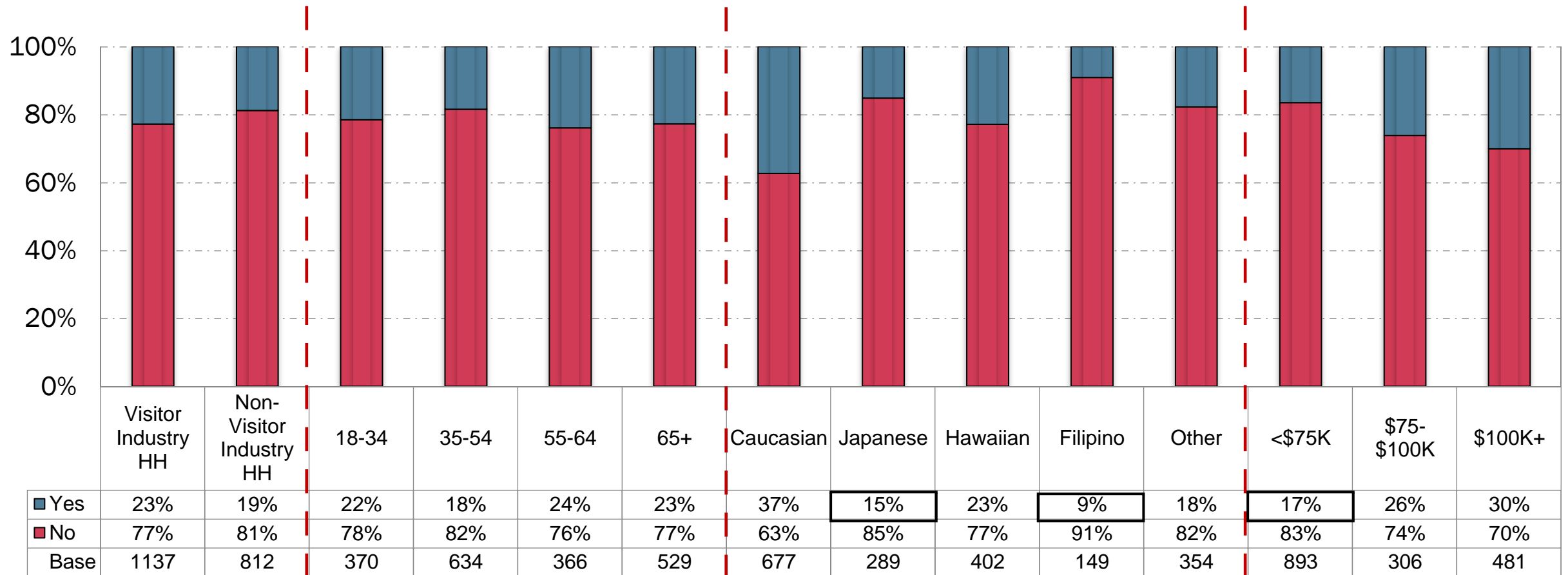
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)” – *By Area (Hawai‘i Island & Kaua‘i)*”



Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)” – *By Demographics*



Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

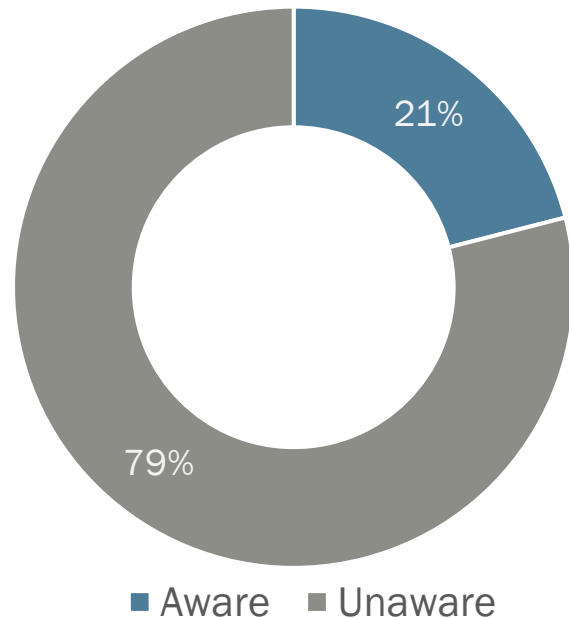


Hawai'i Tourism Authority's Destination Management Action Plan: O'ahu (Spring-Fall 2022)

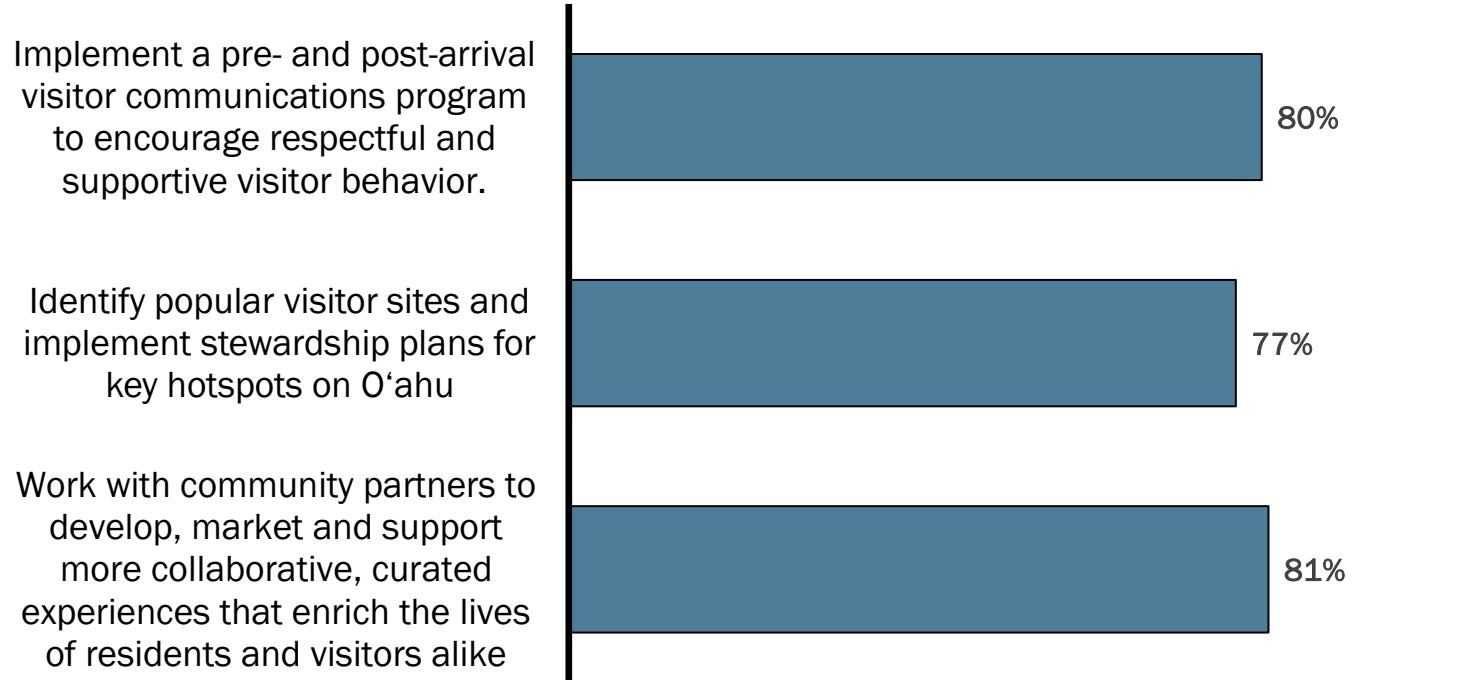
Destination Management Action Plans Awareness: O‘ahu

Although O‘ahu residents’ awareness of HTA Destination Management Action Plans is relatively low (21% aware), recognition of the plan’s efforts was relatively high among those aware of the plan’s existence with more than 3-in-4 aware of the actions taken.

% Aware of HTA Destination Management Action Plans



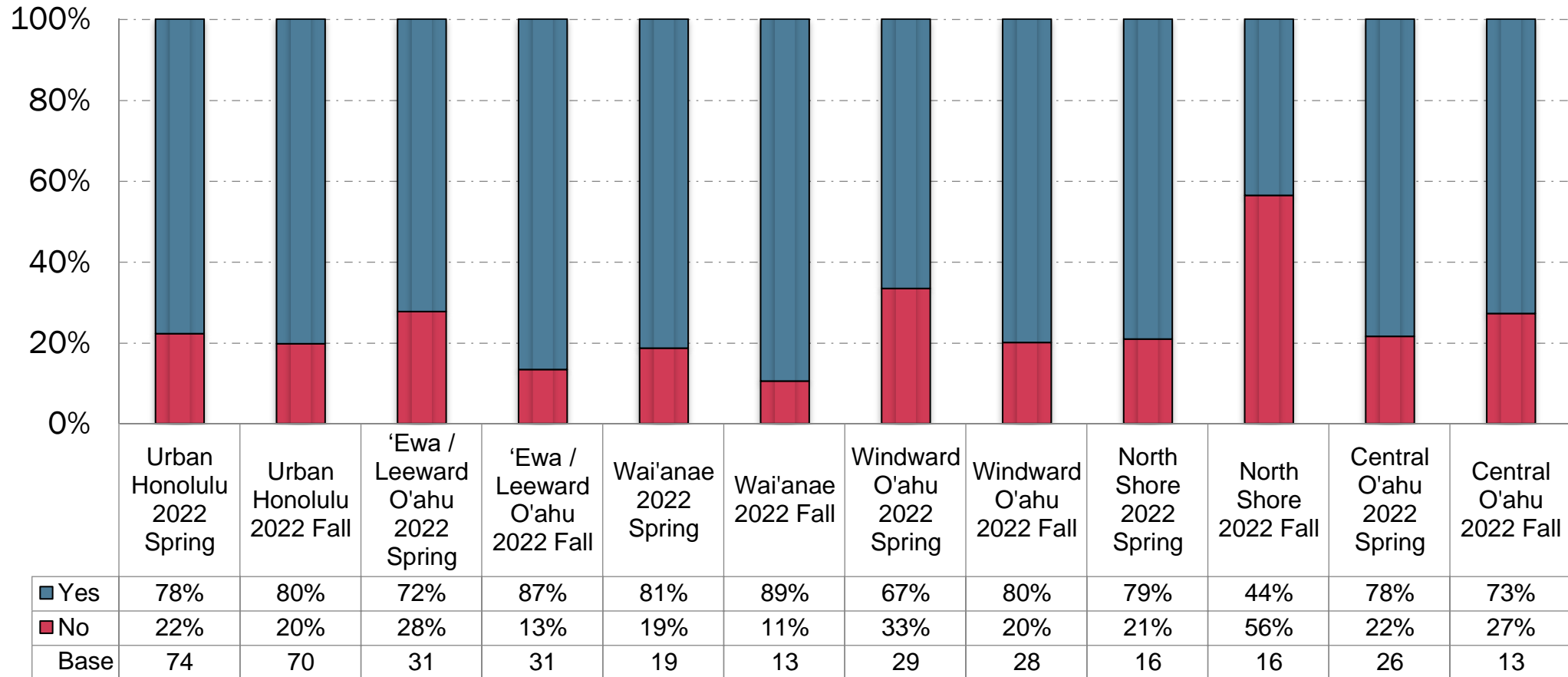
O‘ahu residents aware of DMAP: 77%+ aware of the plan’s efforts



Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?) Base: 811)

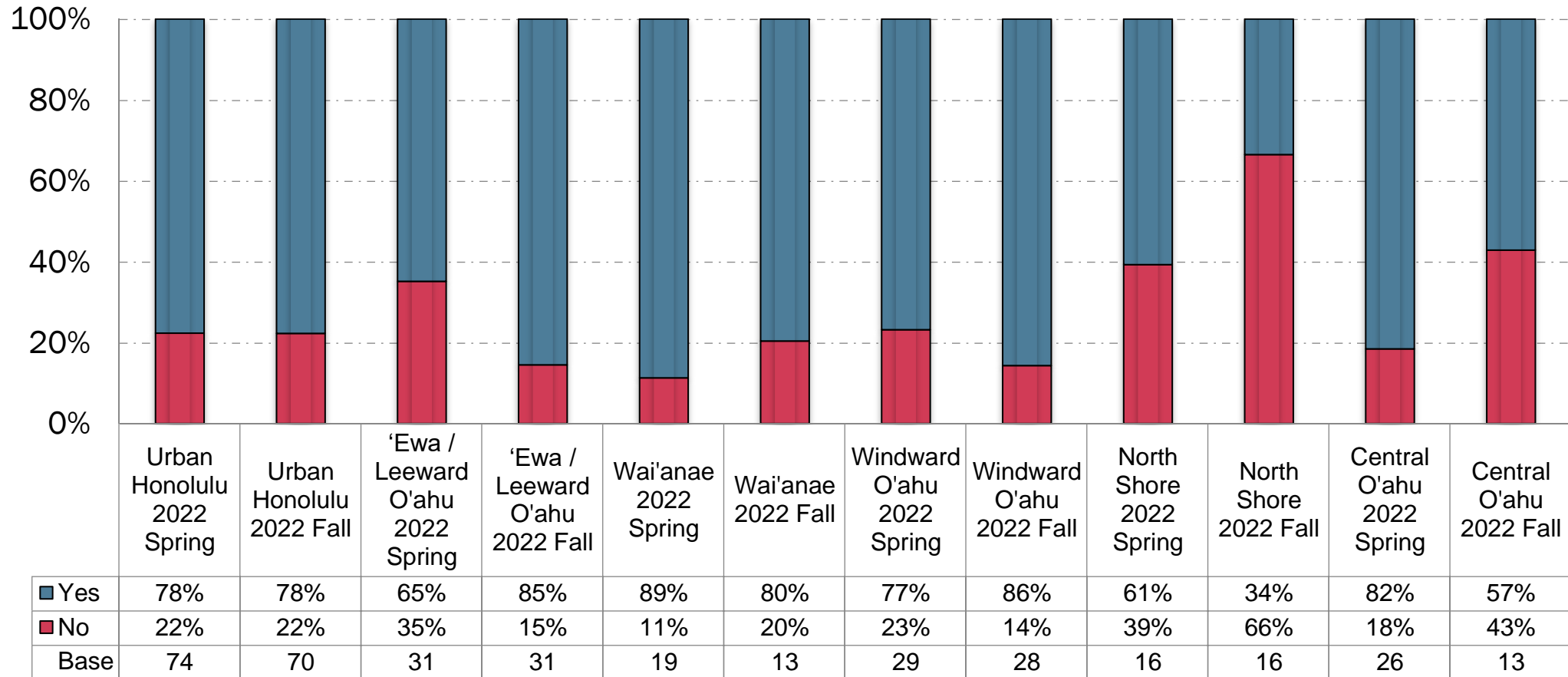
Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 171)

“Implement a pre- and post-arrival visitor communications program to encourage respectful and supportive visitor behavior.” - *By O‘ahu Area*



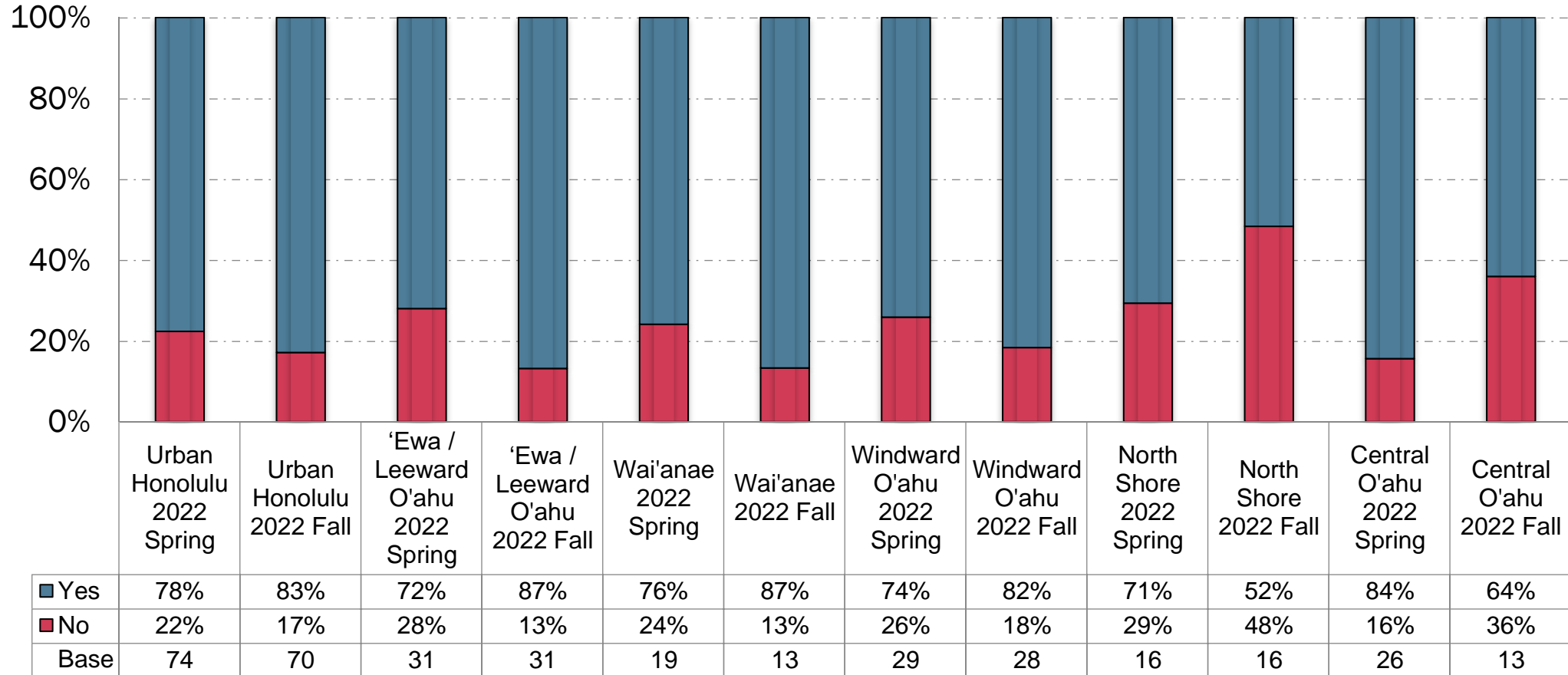
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Identify popular visitor sites and implement stewardship plans for key hotspots on O‘ahu.” - *By O‘ahu Area*



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Work with community partners to develop, market and support more collaborative, curated experiences that enrich the lives of residents and visitors alike.” - *By O‘ahu Area*



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

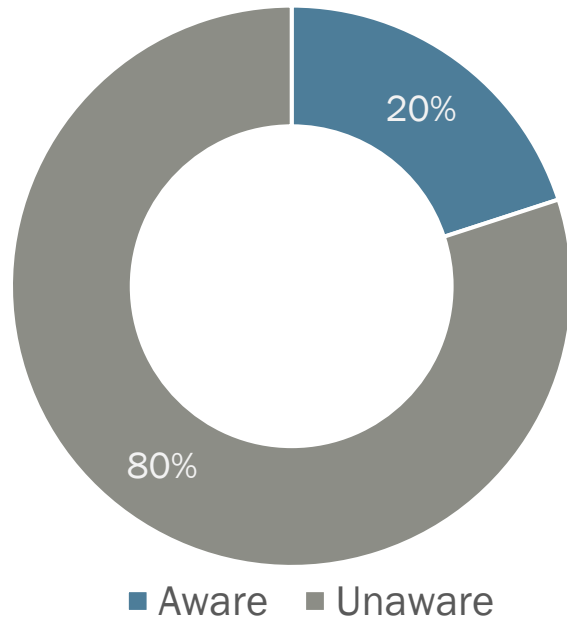


Hawai‘i Tourism Authority’s Destination Management Action Plan: Hawai‘i Island (Spring-Fall 2022)

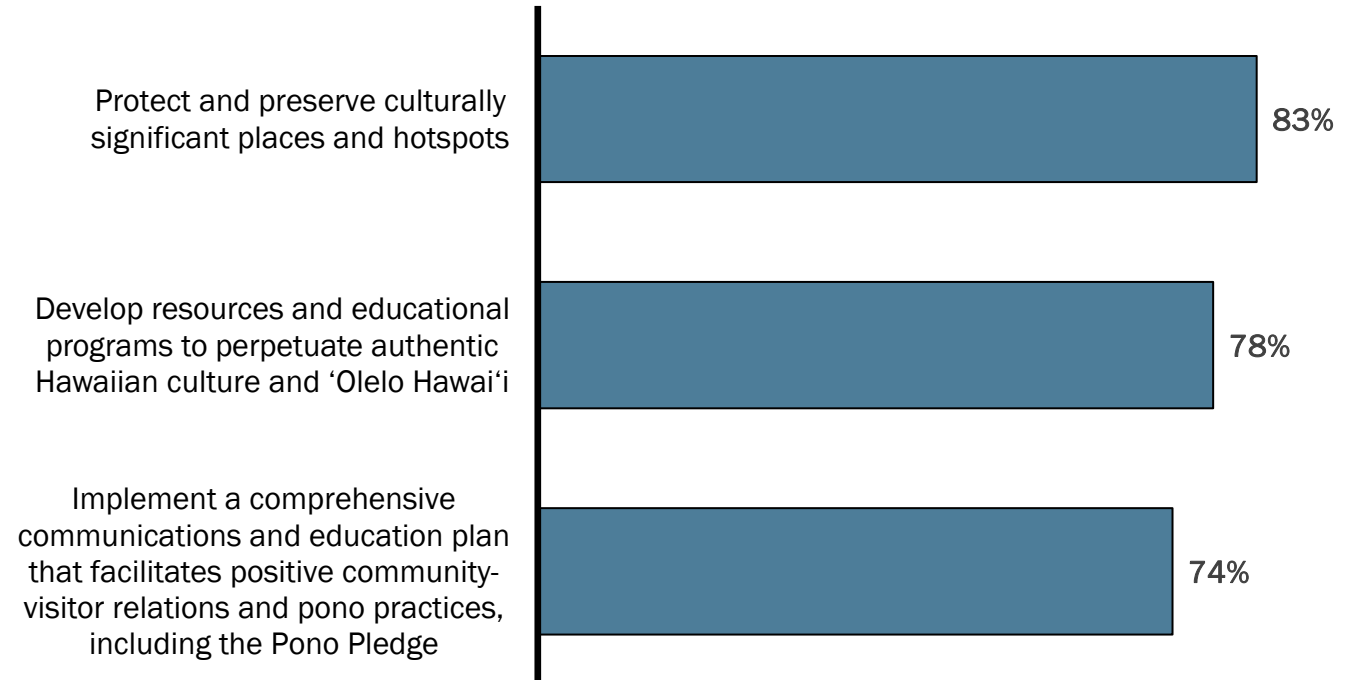
Destination Management Action Plans Awareness: Hawai'i Island

Similarly, among those on Hawai'i Island – those who had heard of DMAP were well aware of the plan's efforts.

% Aware of HTA Destination Management Action Plans



Hawai'i Island residents aware of DMAP: 74%+ aware of the plan's efforts

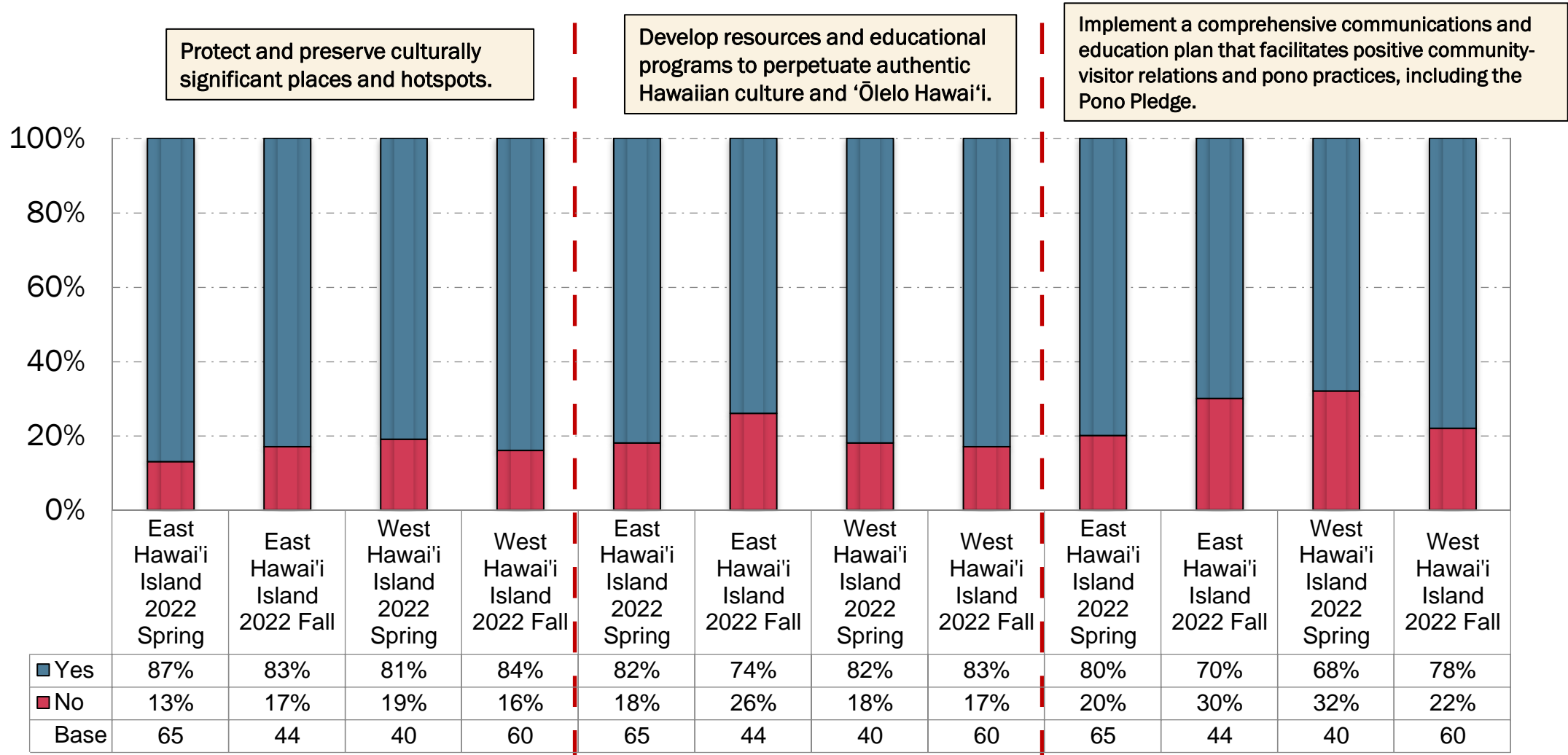


Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 451)

Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 104)

Awareness of Specific DMAP Action Plans

- *By Hawai'i Island Area*



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

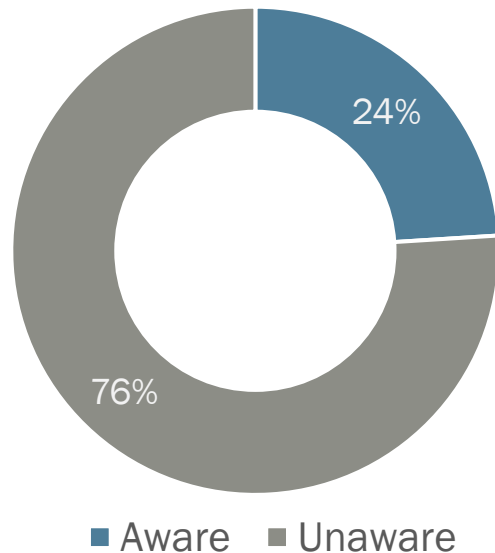


Hawai‘i Tourism Authority’s Destination Management Action Plans: Maui County (Spring-Fall 2022)

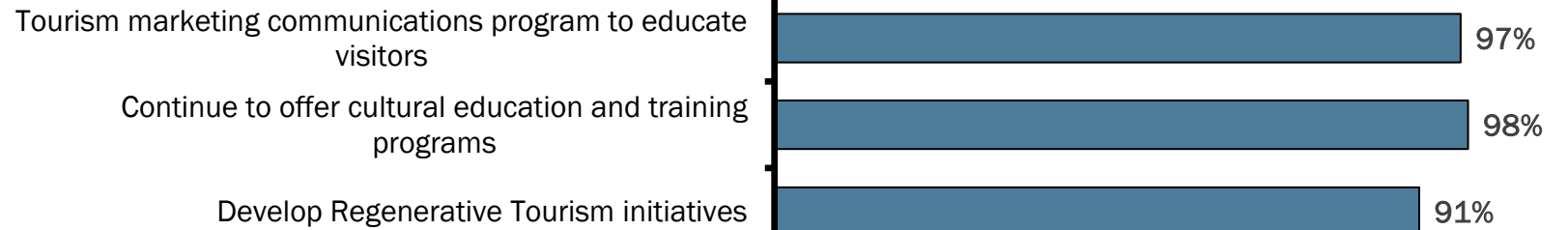
Destination Management Action Plans Awareness: Maui County

Residents that have heard of the Destination Management Action Plan were well aware of the activities involved, particularly on Maui Island and Lānaʻi.

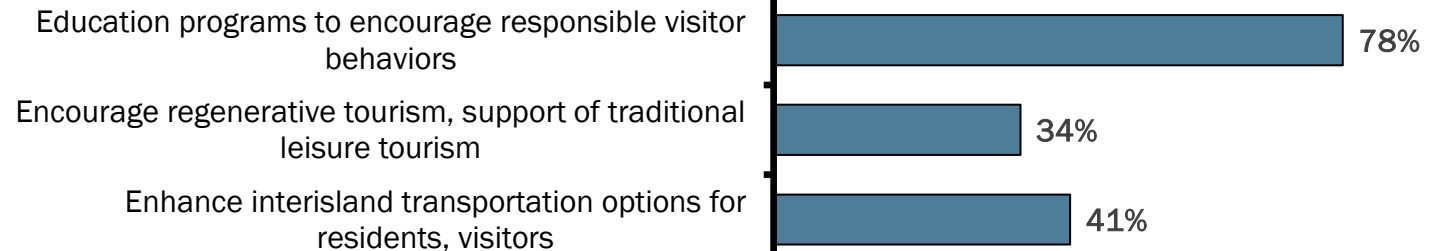
% Aware of HTA Destination Management Action Plans



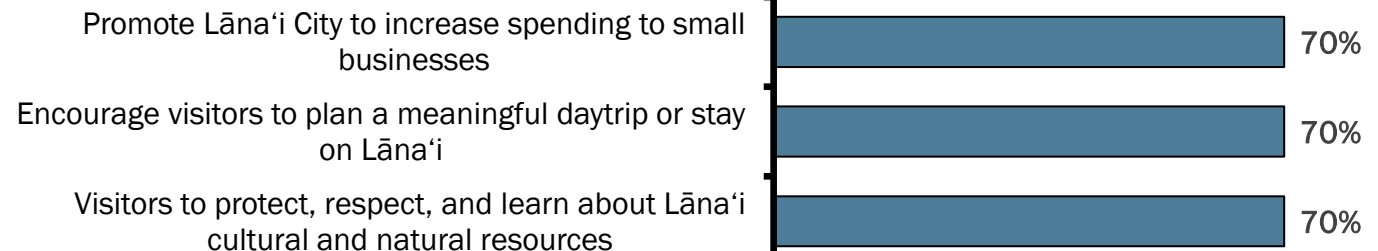
Maui residents aware of DMAP



Molokaʻi residents aware of DMAP



Lānaʻi residents aware of DMAP



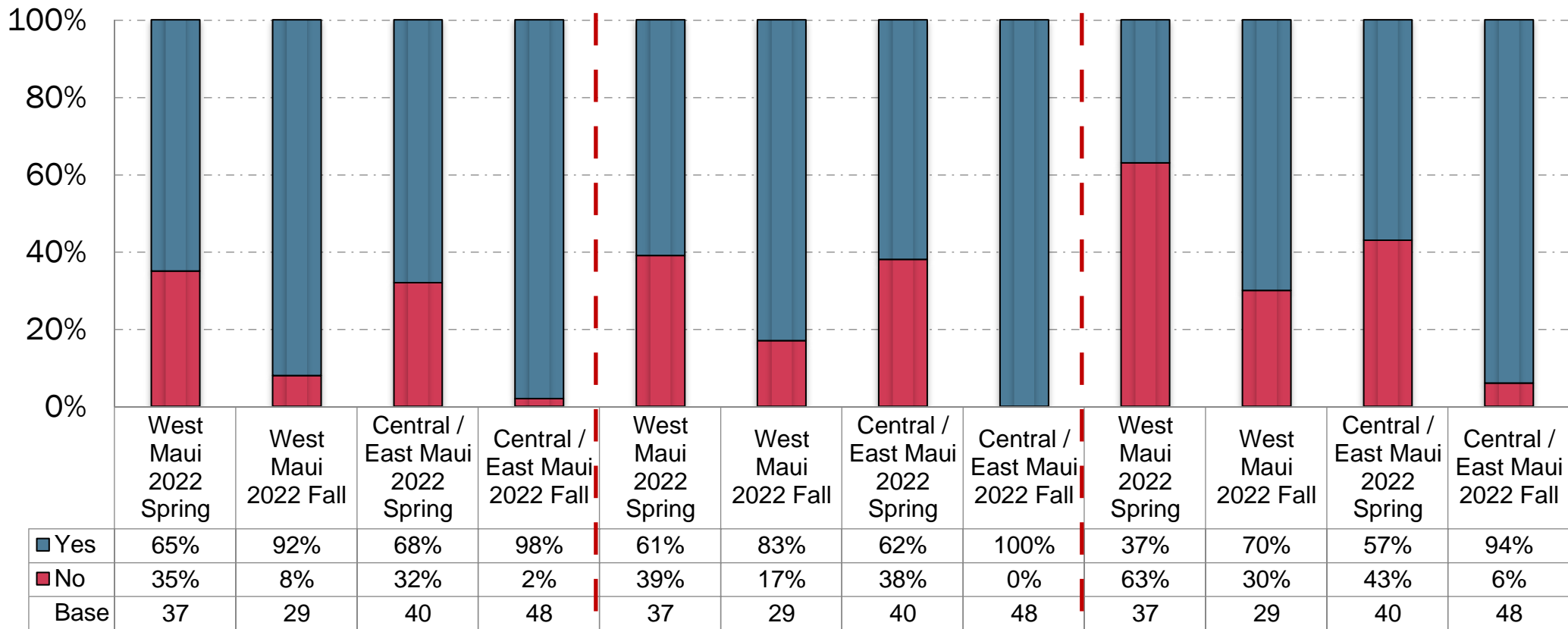
Awareness of Specific DMAP Action Plans

- *By Island of Maui Area*

Implement a responsible tourism marketing communications program to educate visitors pre- and post-arrival about safe and respectful travel.

Continue to offer cultural education and training programs to enhance and perpetuate aloha, mālama and kuleana, and the authentic Hawai'i experience.

Develop Regenerative Tourism initiatives.



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

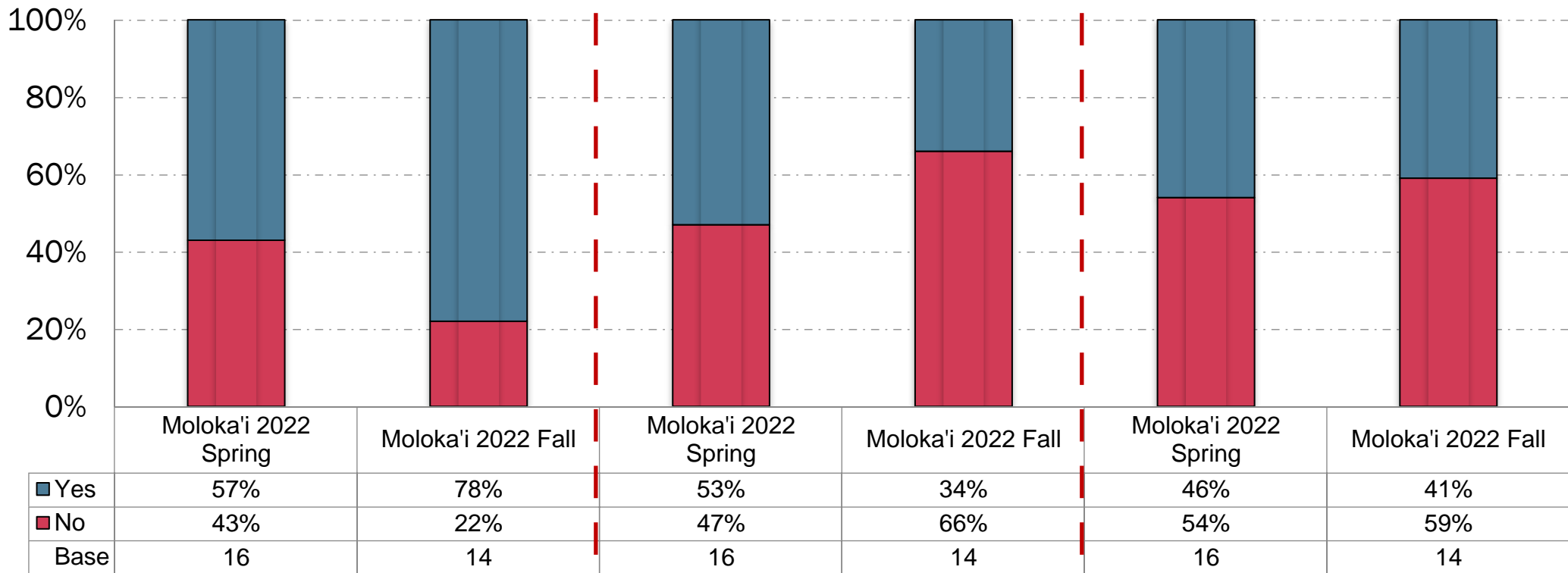
Awareness of Specific DMAP Action Plans

- *By Island of Moloka'i*

Develop communication and education programs to encourage responsible visitor behaviors.

Support the growth of Moloka'i businesses by encouraging new product development focused on regenerative tourism, while continuing support of traditional leisure tourism.

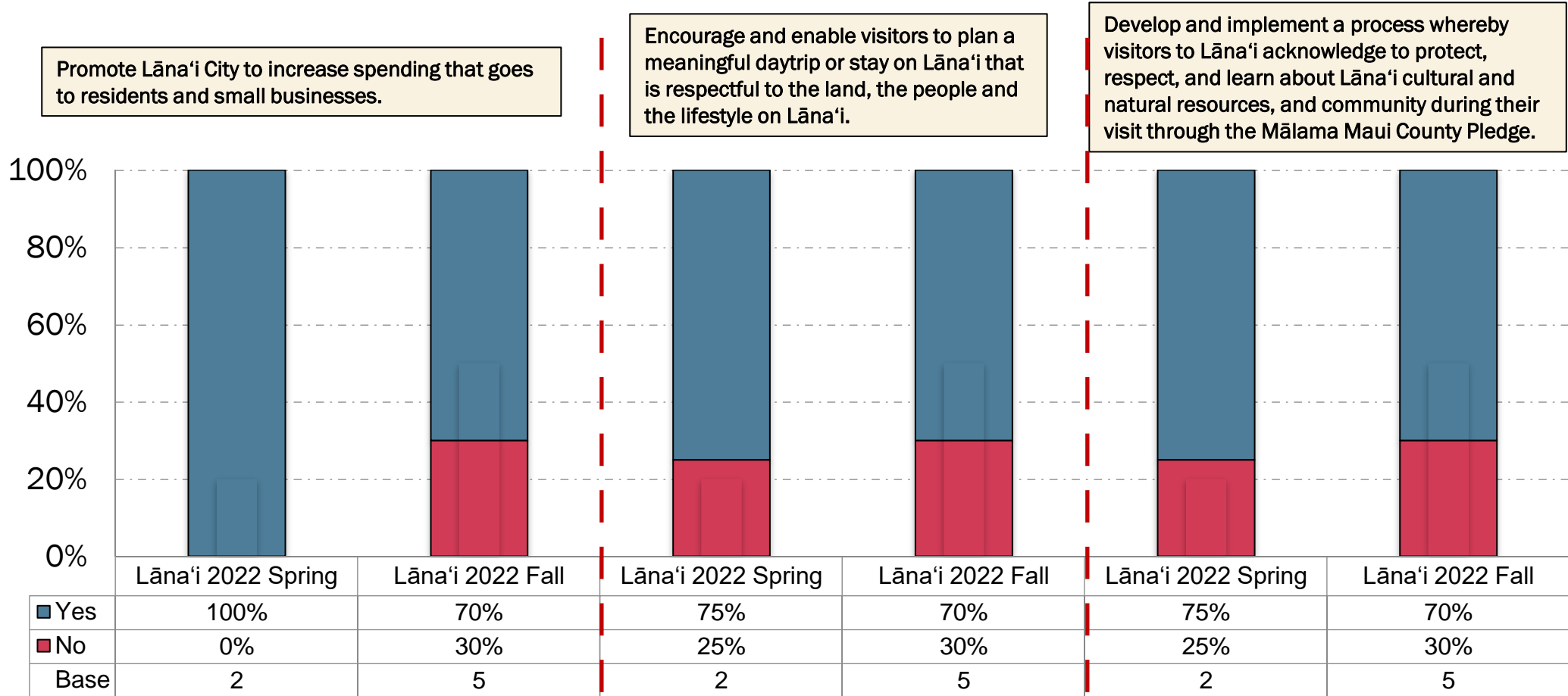
Engage partners to determine a path forward that will enhance interisland transportation options for both residents and visitors.



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

Awareness of Specific DMAP Action Plans

- *By Island of Lānaʻi*



Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

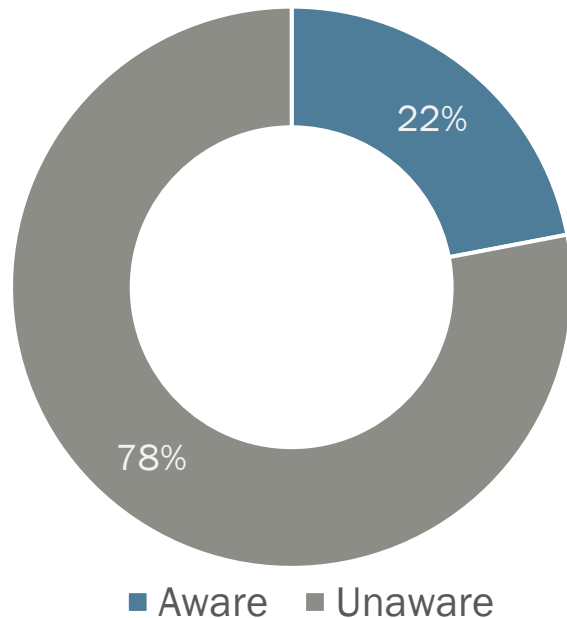


Hawai‘i Tourism Authority’s Destination Management Action Plan: Kaua‘i (Spring-Fall 2022)

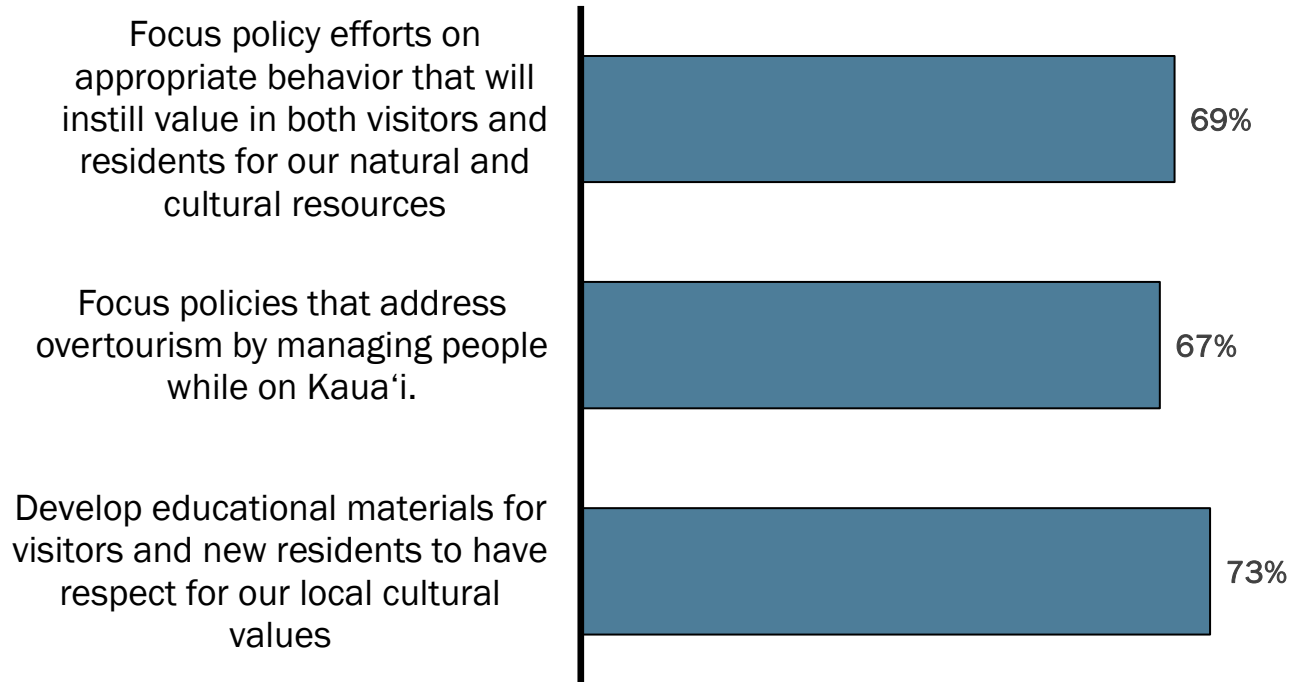
Destination Management Action Plans Awareness: Kaua'i

Among those aware of Destination Management Action Plans on Kaua'i, over two-in-three had heard of the different activities involved.

% Aware of HTA Destination Management Action Plans



Kaua'i residents aware of DMAP: 67%+ aware of the plan's efforts



Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 290)

Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 68)

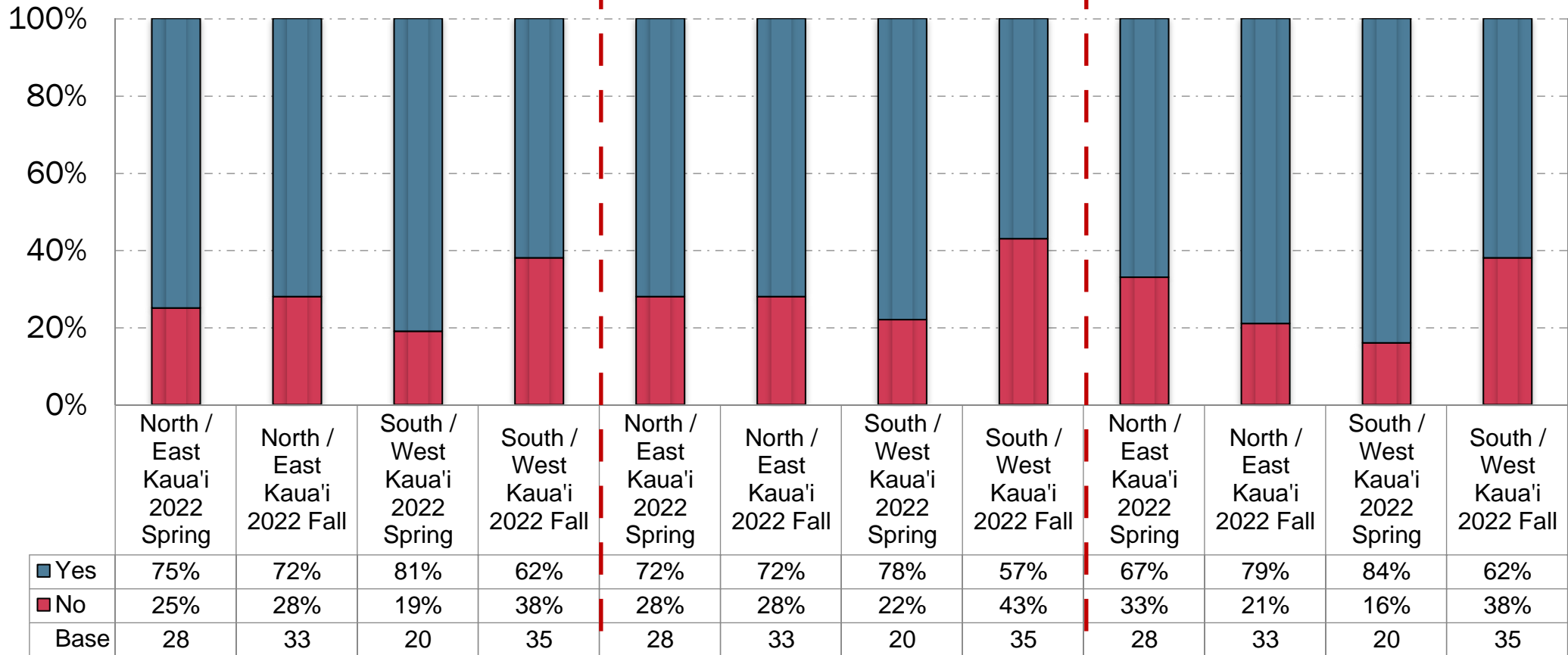
Awareness of Specific DMAP Action Plans

- *By Island of Kaua'i Area*

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

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

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

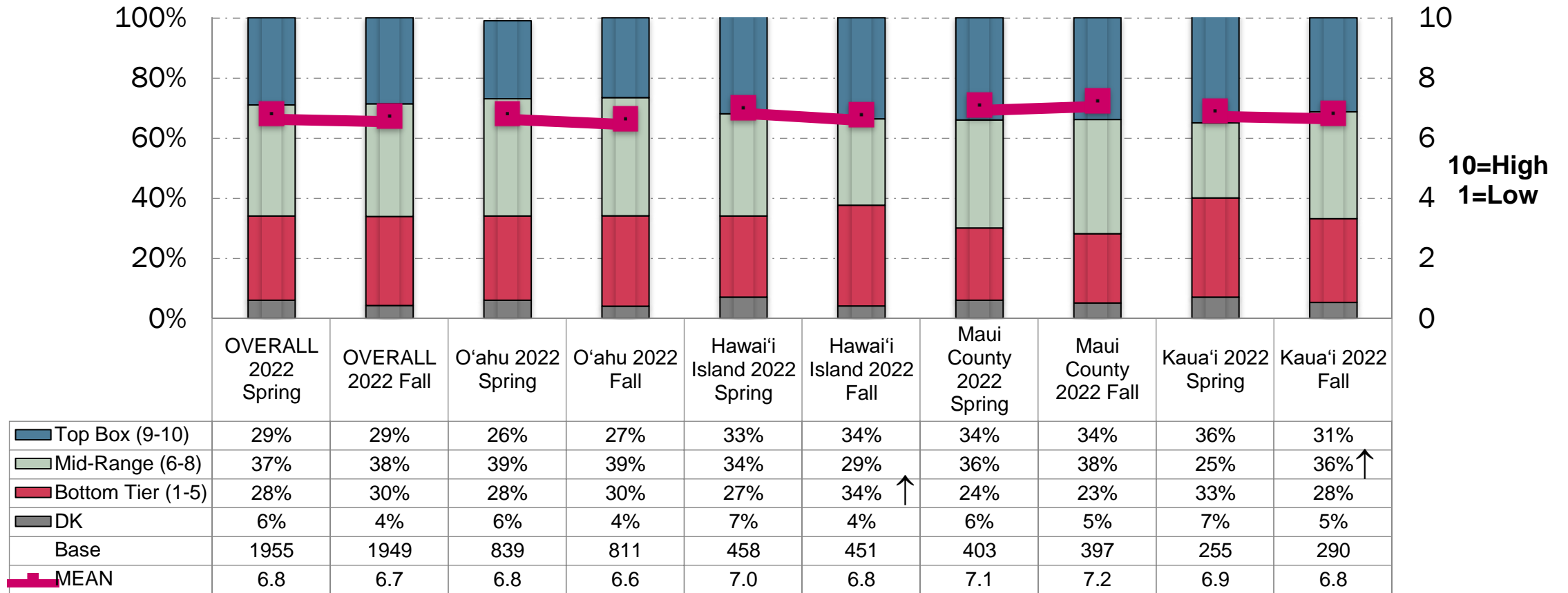


Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



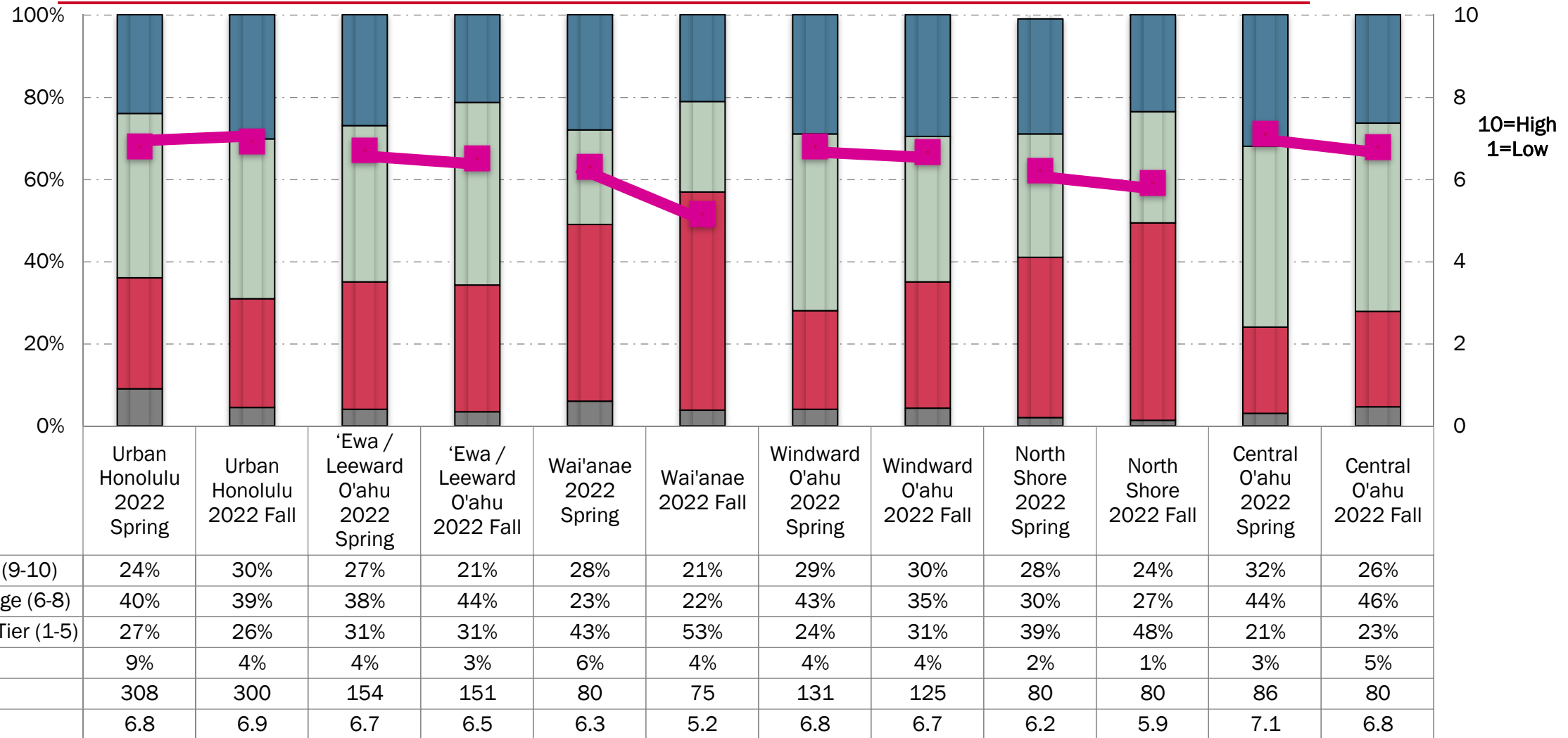
Use of Tax Revenues to Manage/Encourage Tourism (Spring-Fall 2022)

“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” – *By County*

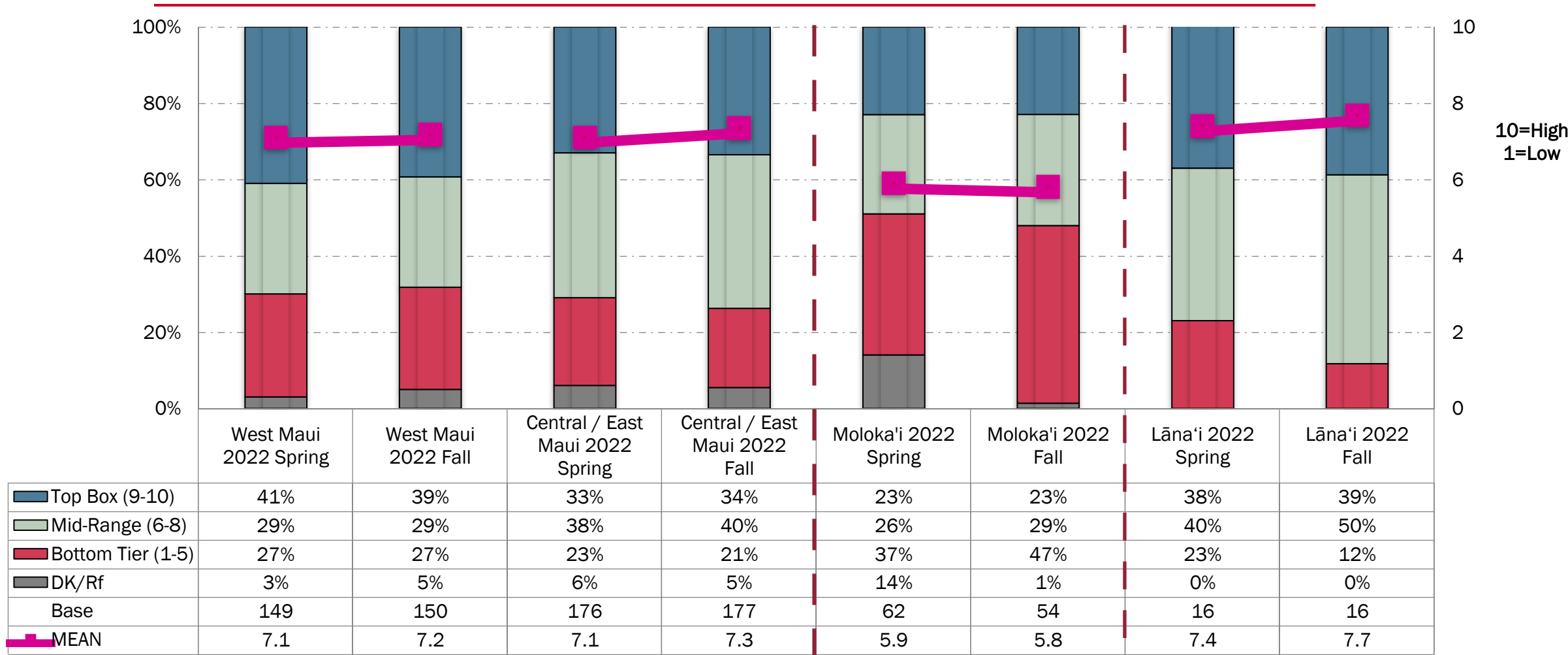


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

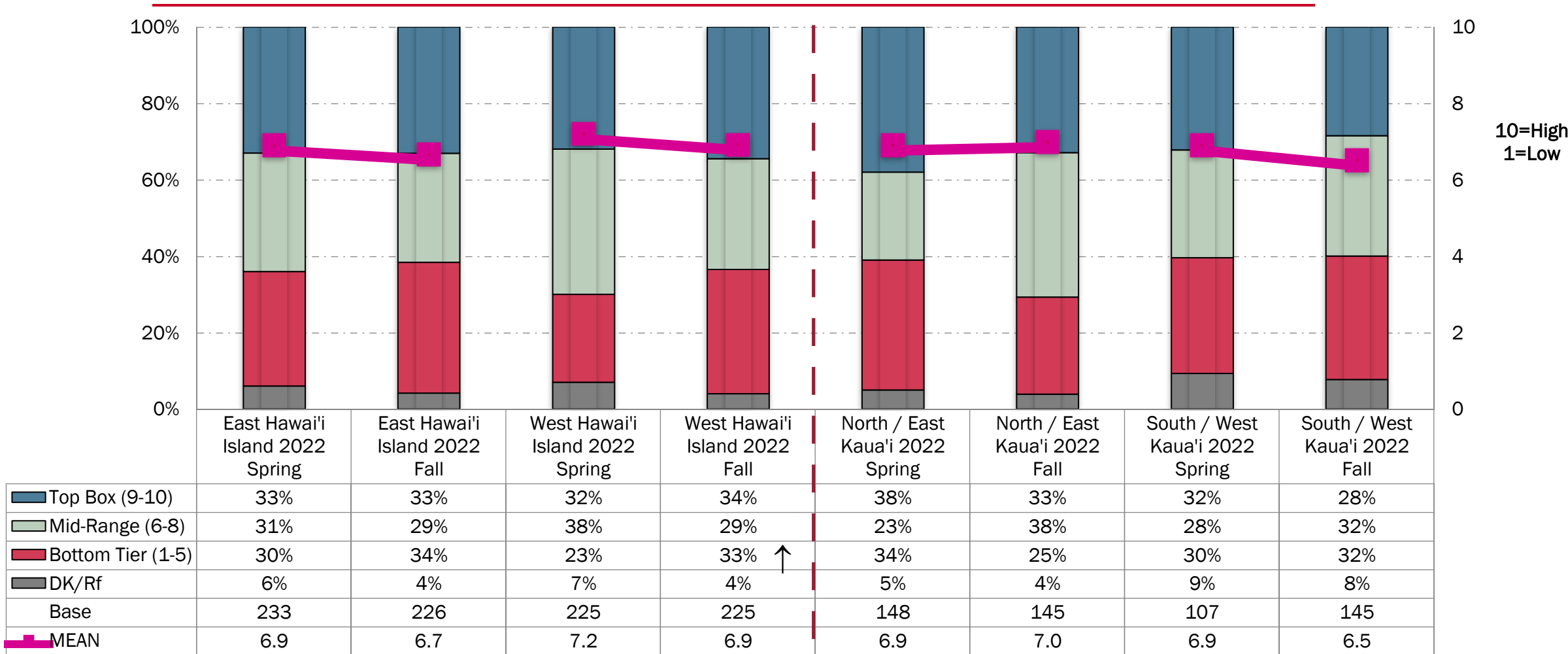
“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” - *By Area (O’ahu)*



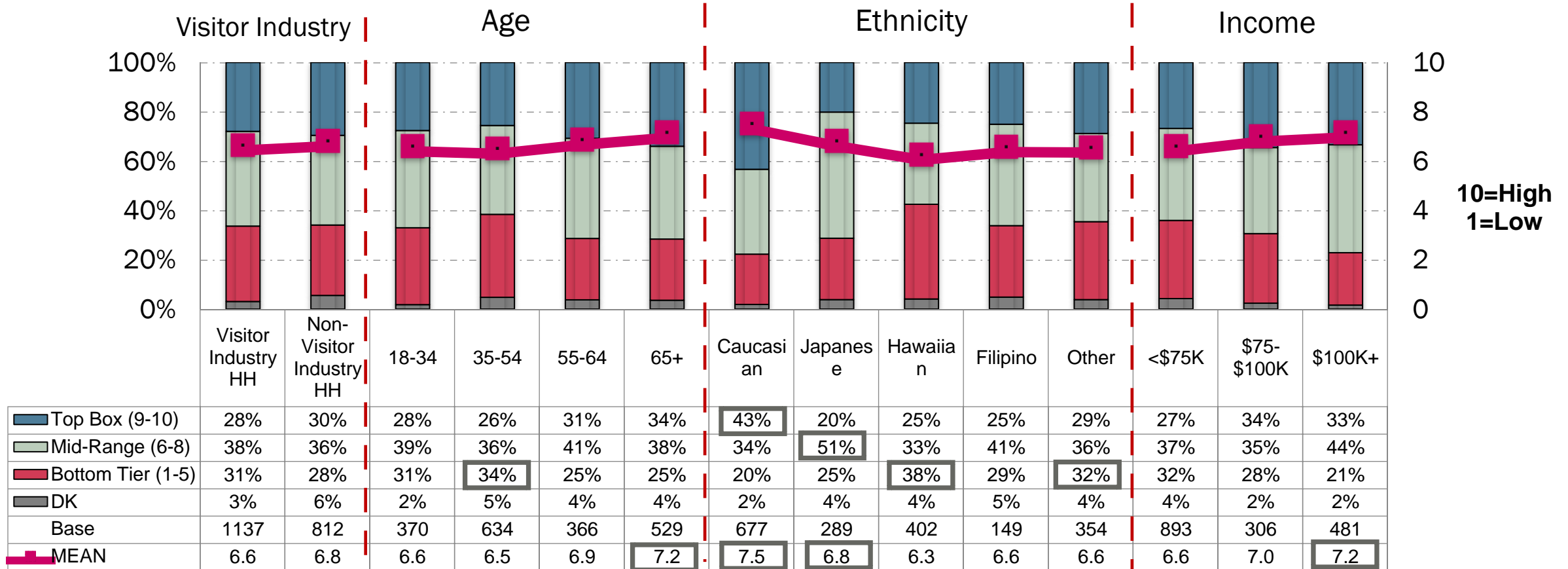
“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” - *By Area (Maui County)*



“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” - *By Area (Hawai‘i Island & Kaua‘i)*

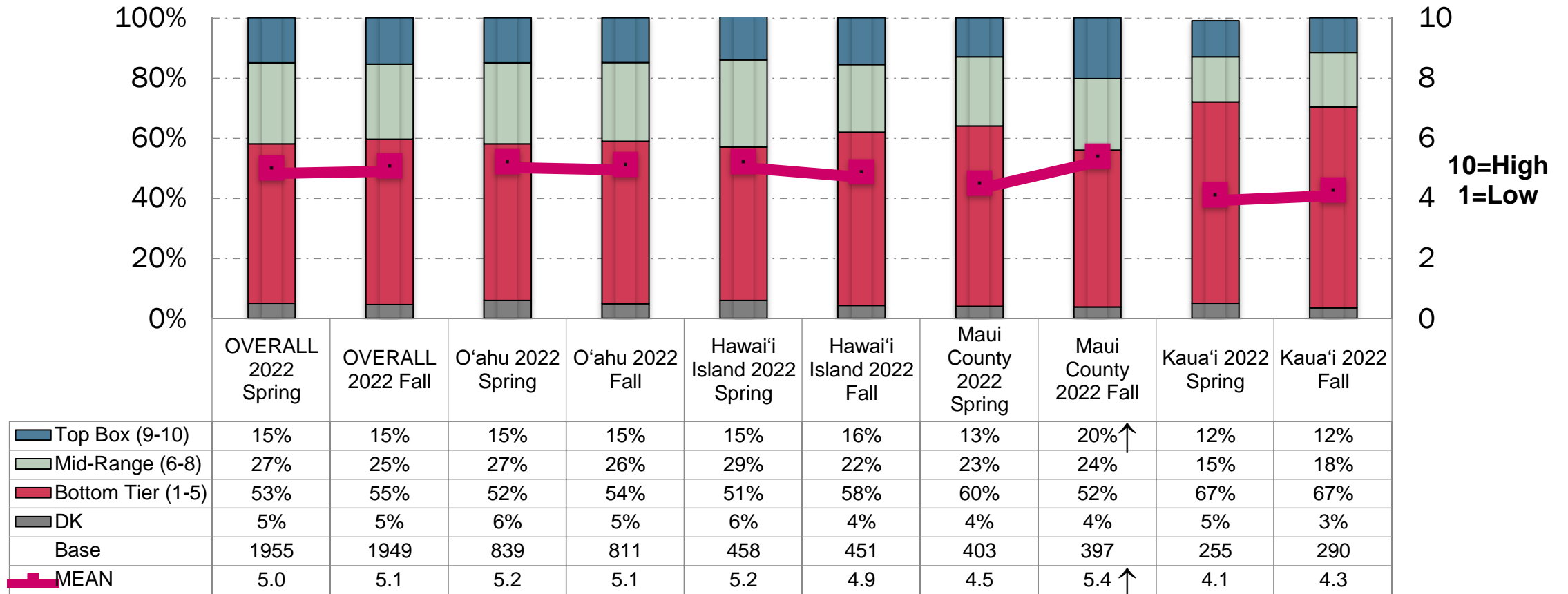


“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” – *By Demographics*



Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

“Tax dollars should be spent to ENCOURAGE tourism in my community.” – *By County*

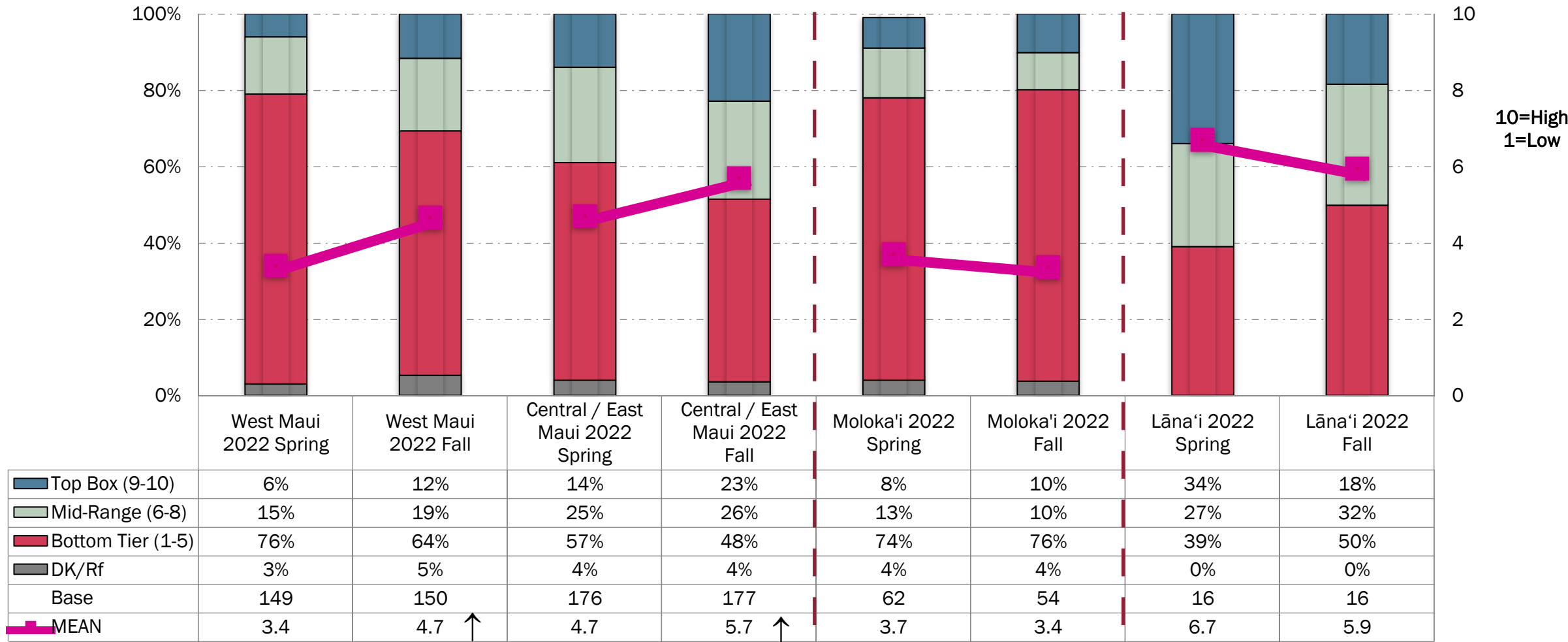


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

“Tax dollars should be spent to ENCOURAGE tourism in my community.” - *By Area (O’ahu)*

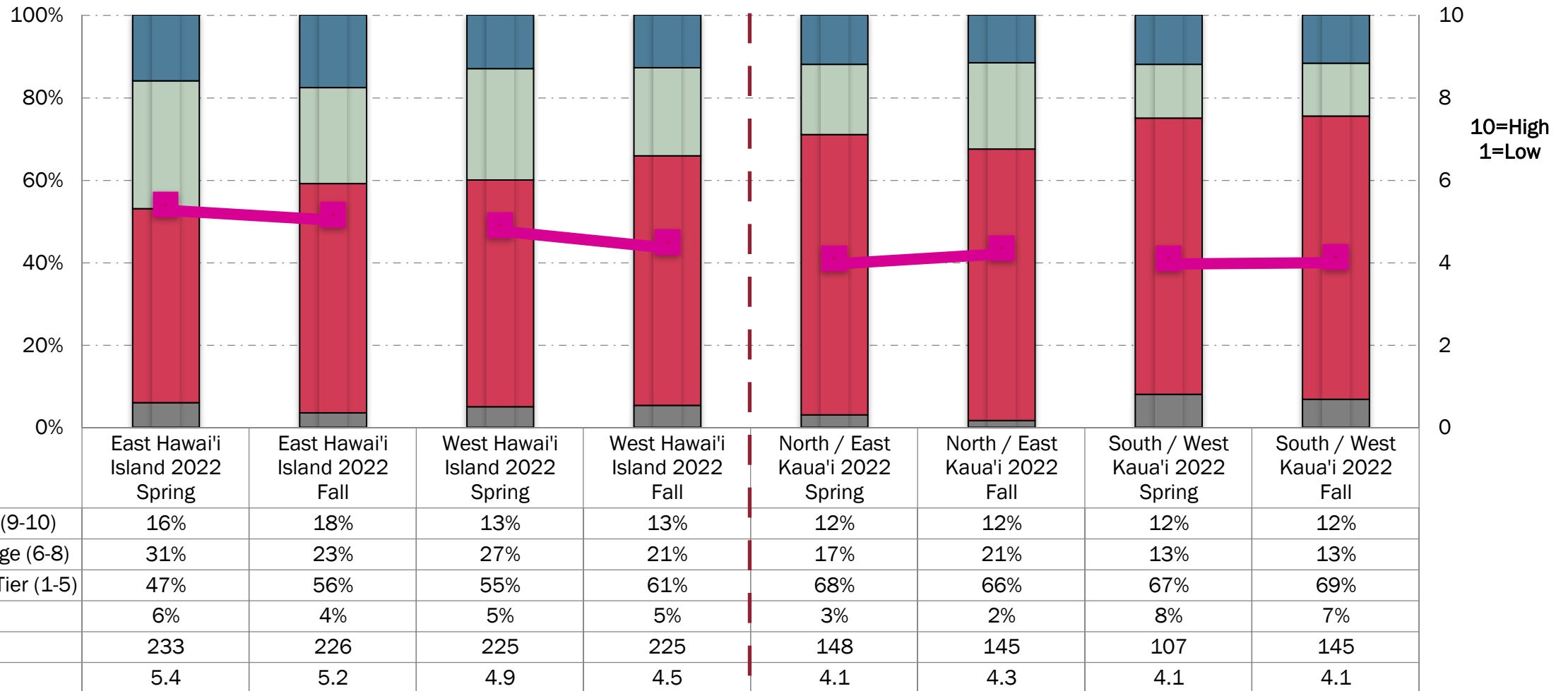


“Tax dollars should be spent to ENCOURAGE tourism in my community.” - *By Area (Maui County)*

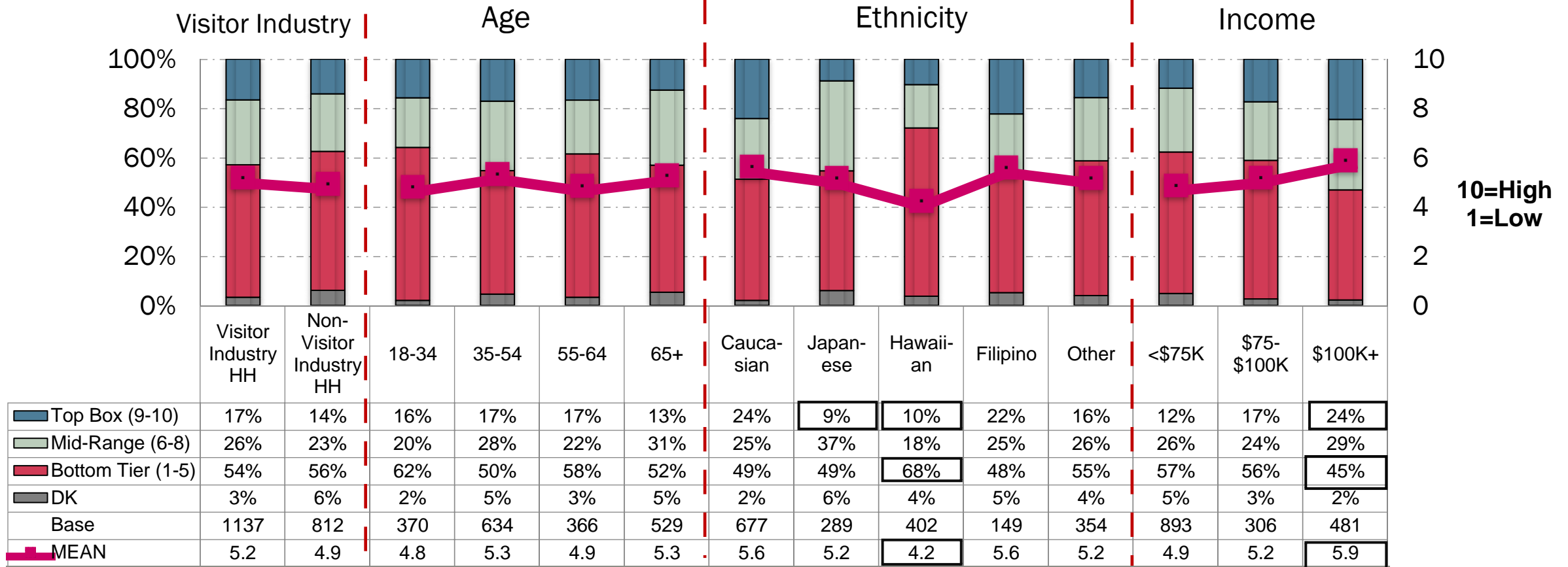


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

“Tax dollars should be spent to ENCOURAGE tourism in my community.” - *By Area (Hawai‘i Island & Kaua‘i)*



“Tax dollars should be spent to ENCOURAGE tourism in my community.” – *By Demographics*



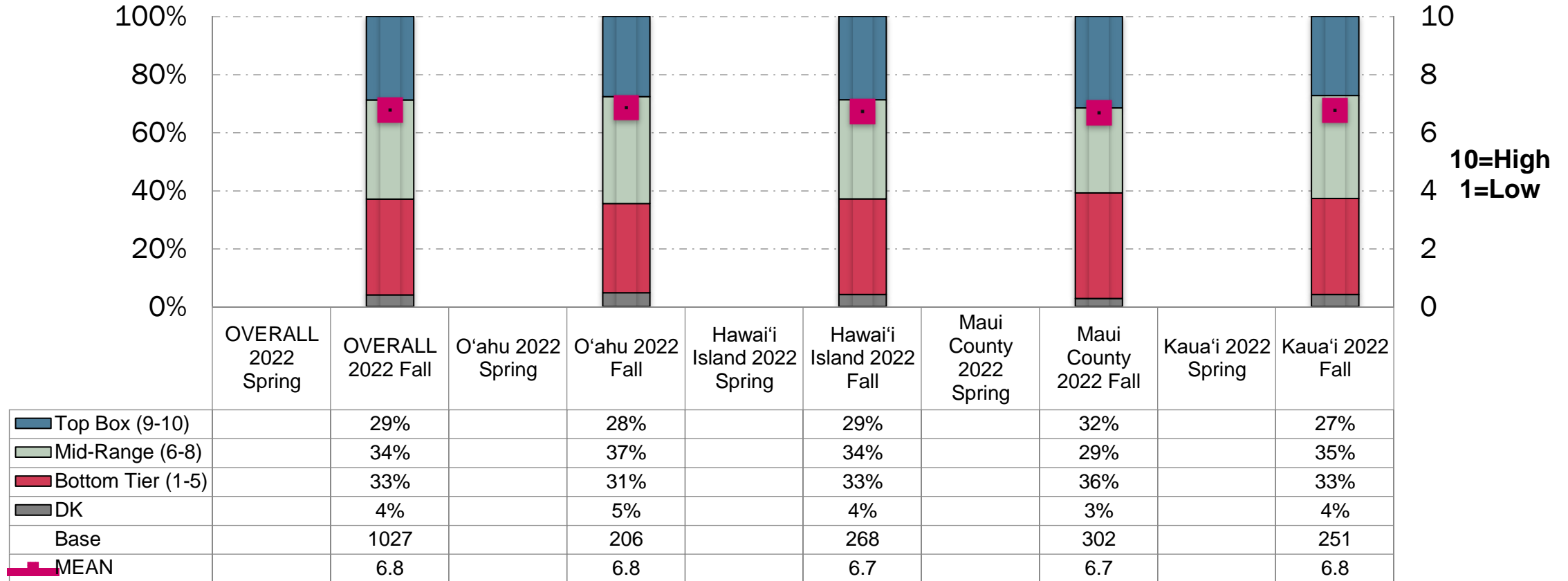
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]



Tourism Worth the Issues (Spring-Fall 2022)

“I feel like tourism is worth the issues associated with the industry”

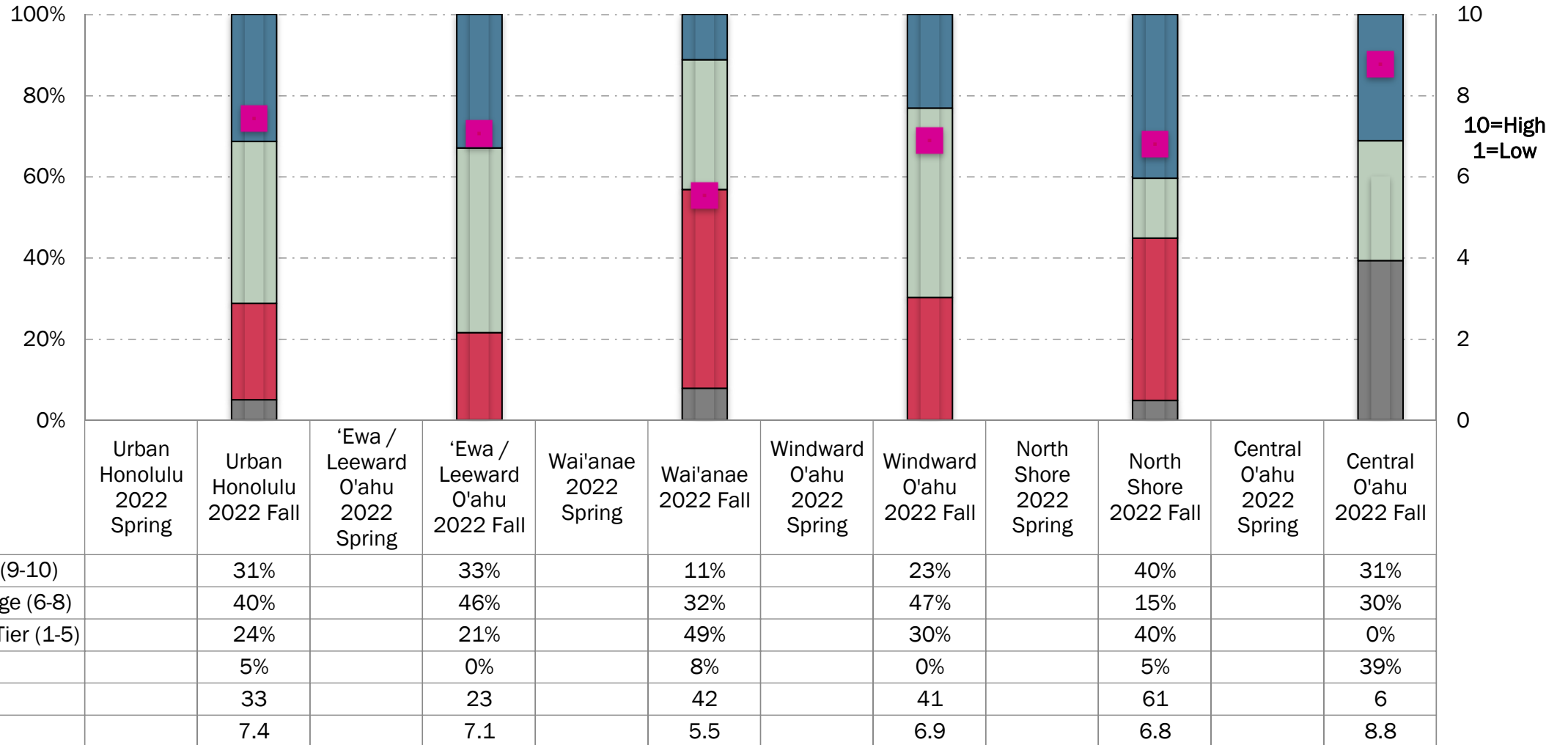
– *By County*



Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating

“I feel like tourism is worth the issues associated with the industry” - *By Area (O‘ahu)*



Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating

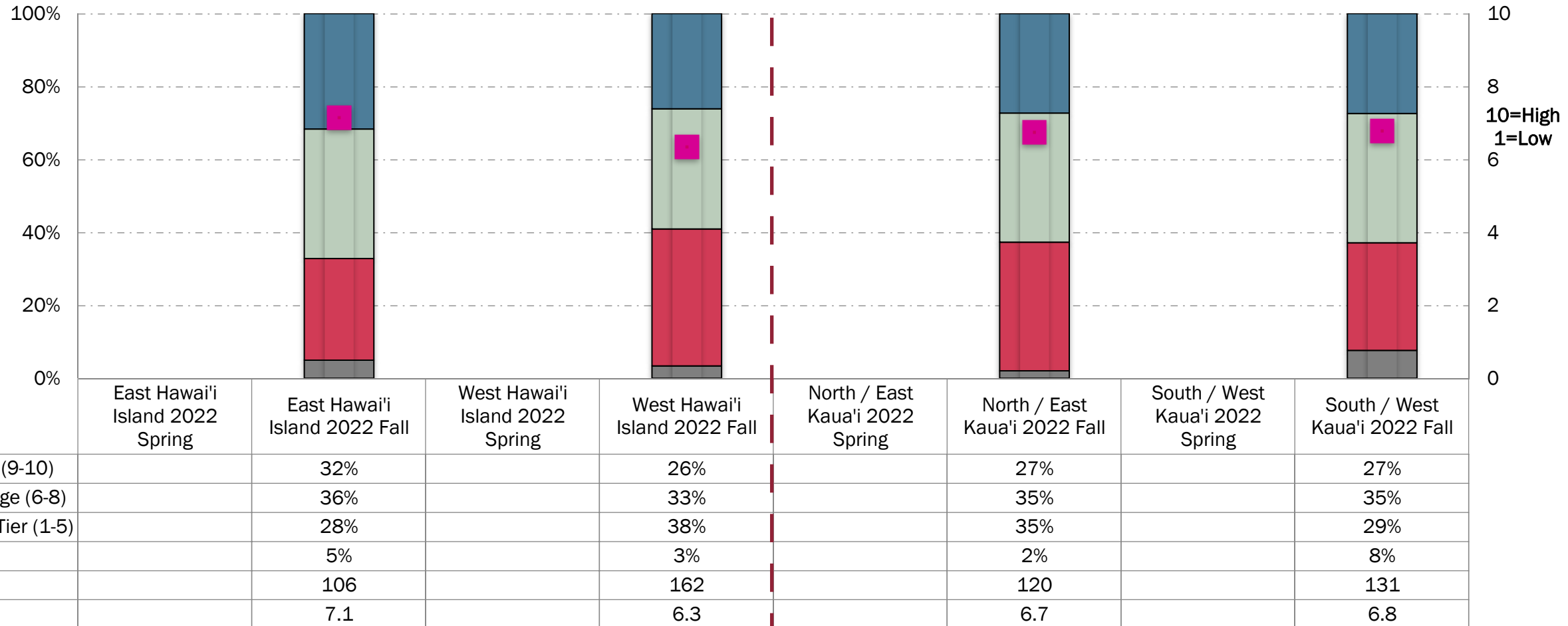
“I feel like tourism is worth the issues associated with the industry” - *By Area (Maui County)*



Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating

“I feel like tourism is worth the issues associated with the industry” - *By Area (Hawai'i Island & Kaua'i)*

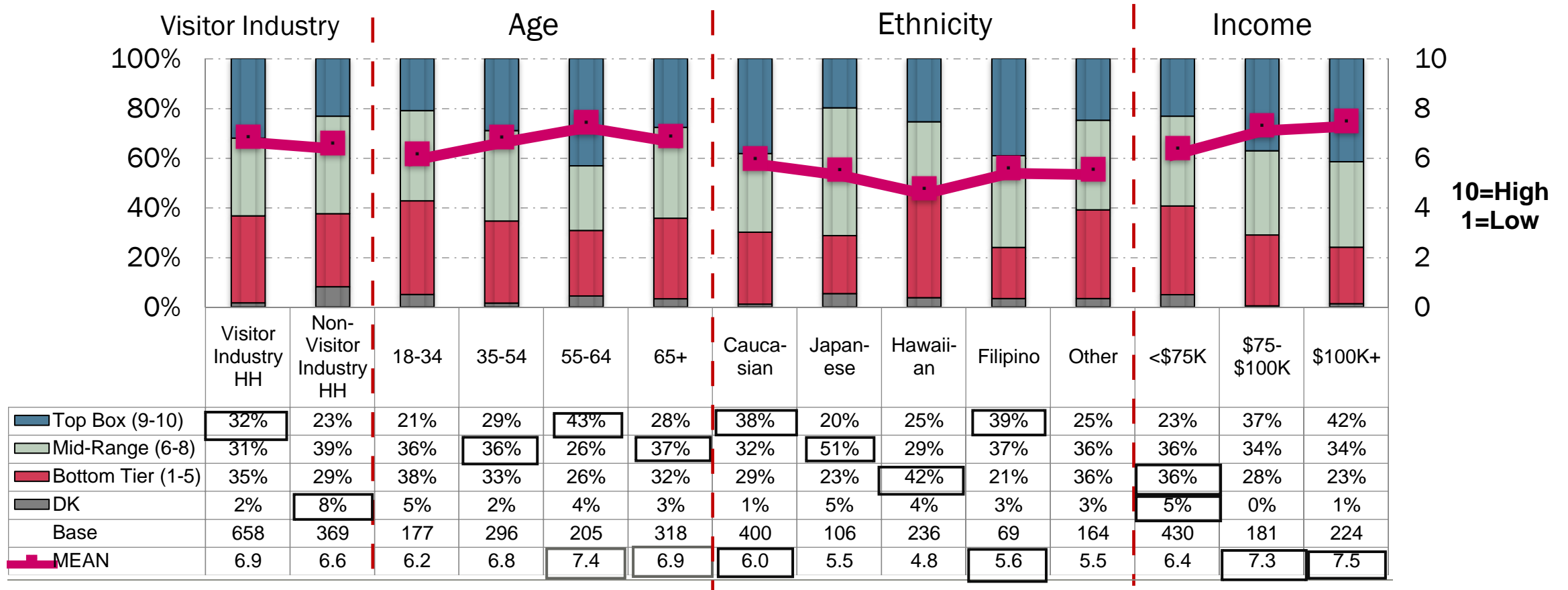


Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating

“I feel like tourism is worth the issues associated with the industry”

– *By Demographics*



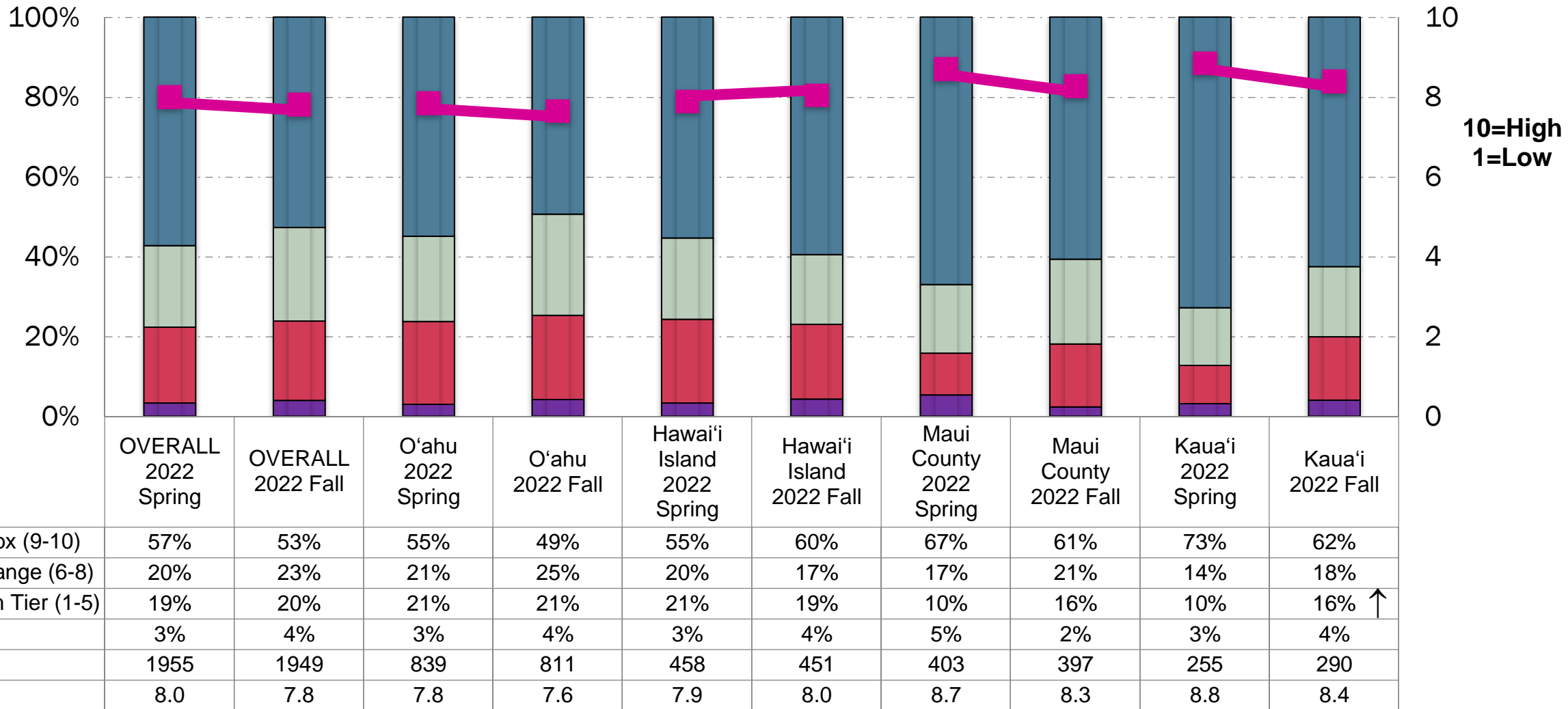
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Note: Scale changed from Spring 2022: Yes/No response to Fall 2022: 1-10 Agreement rating



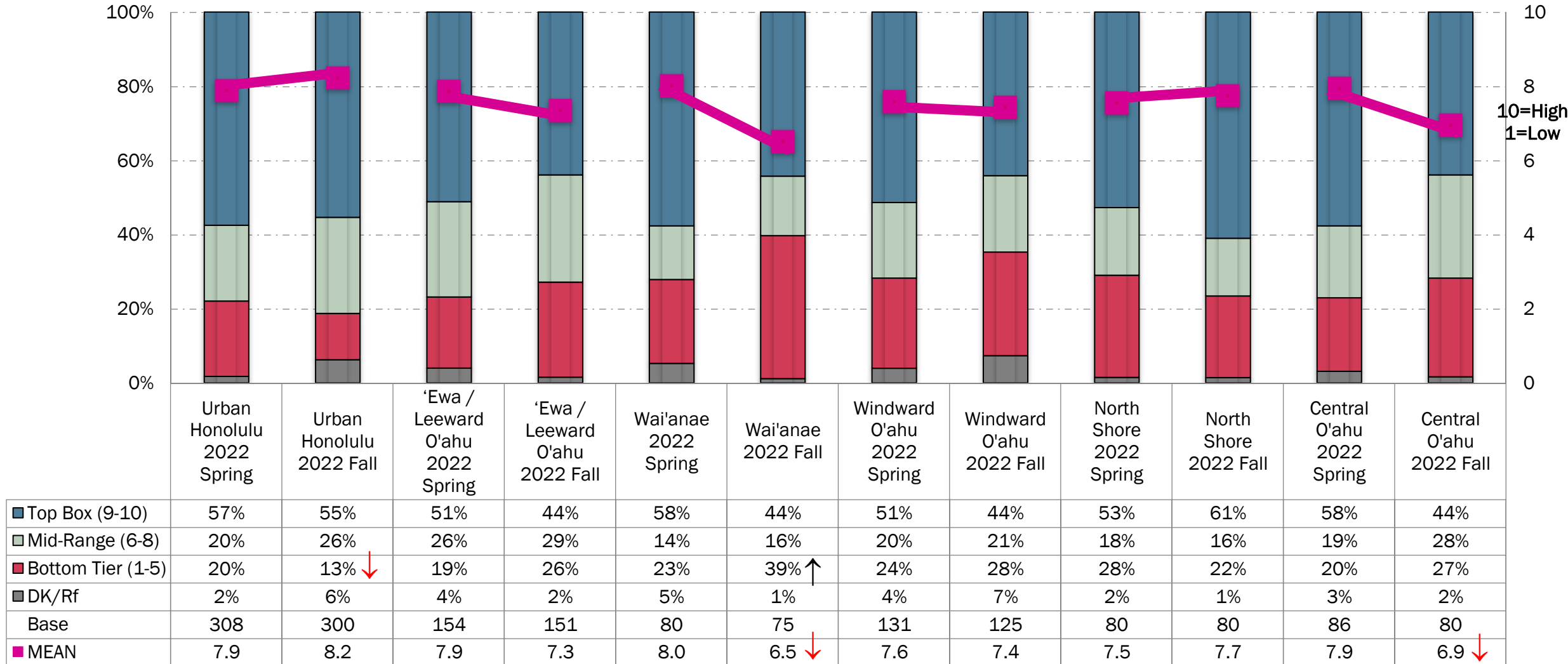
Tourism Management Strategies (Spring-Fall 2022)

“Eliminate illegal vacation rentals on my island” – *By County*

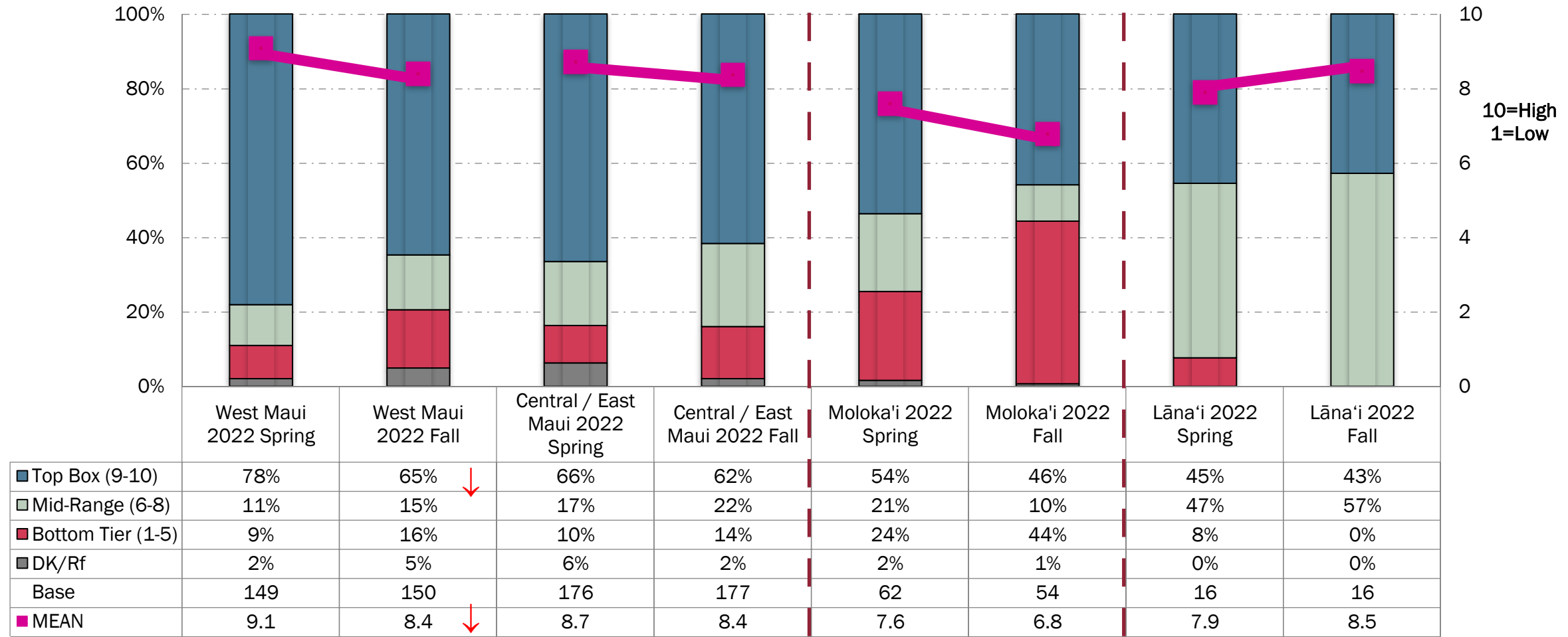


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Eliminate illegal vacation rentals on my island” - *By Area (O‘ahu)*

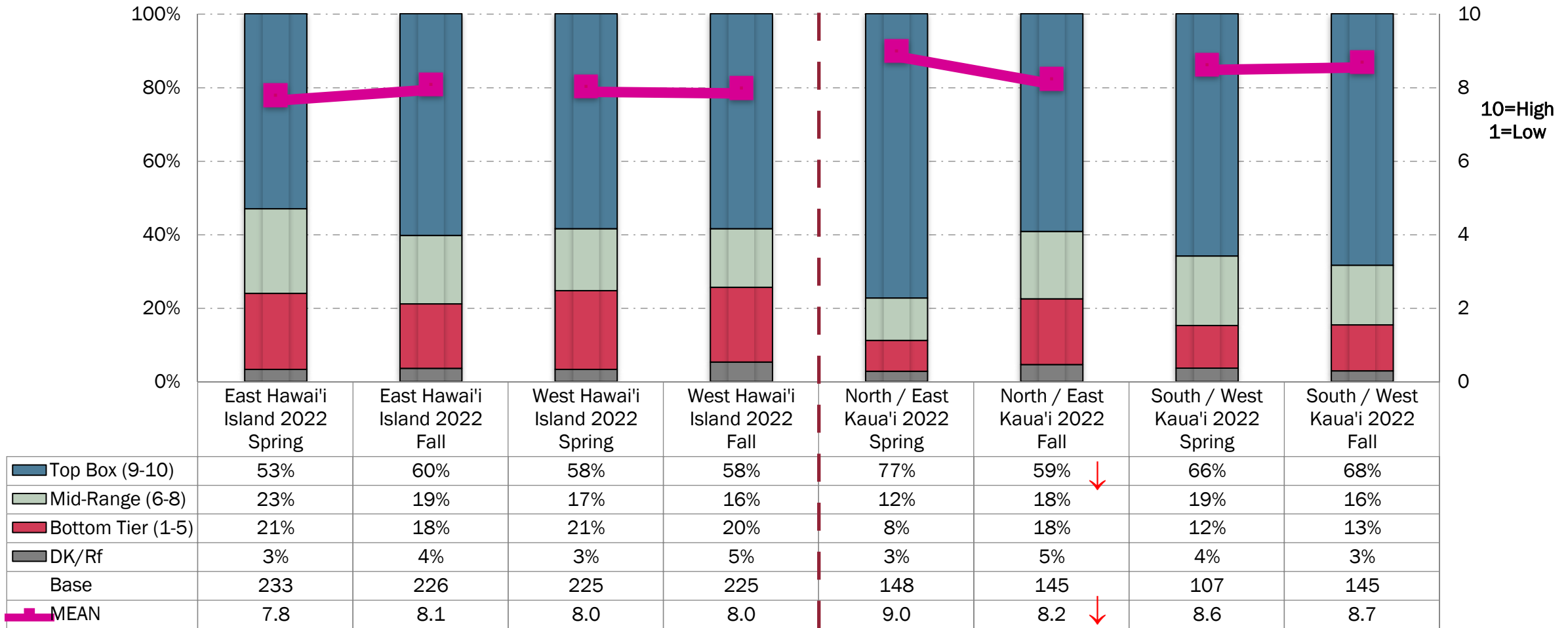


“Eliminate illegal vacation rentals on my island” - *By Area (Maui County)*



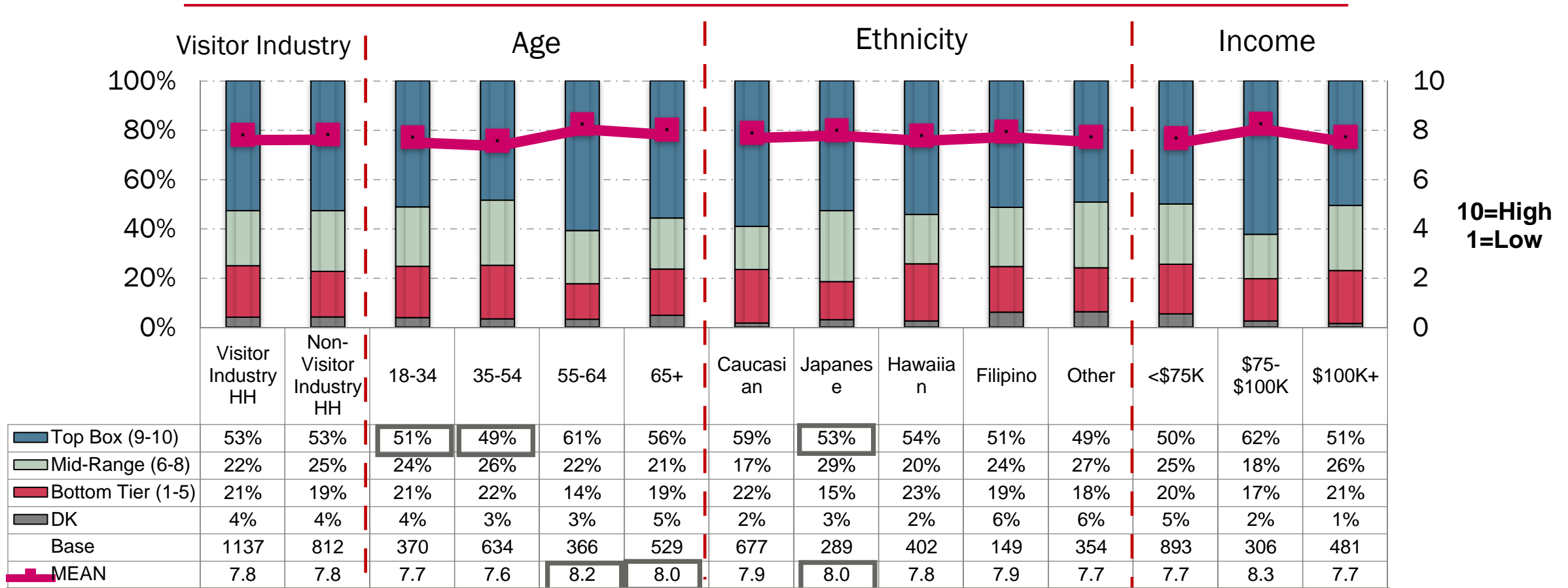
“Eliminate illegal vacation rentals on my island”

- *By Area (Hawai'i Island & Kaua'i)*



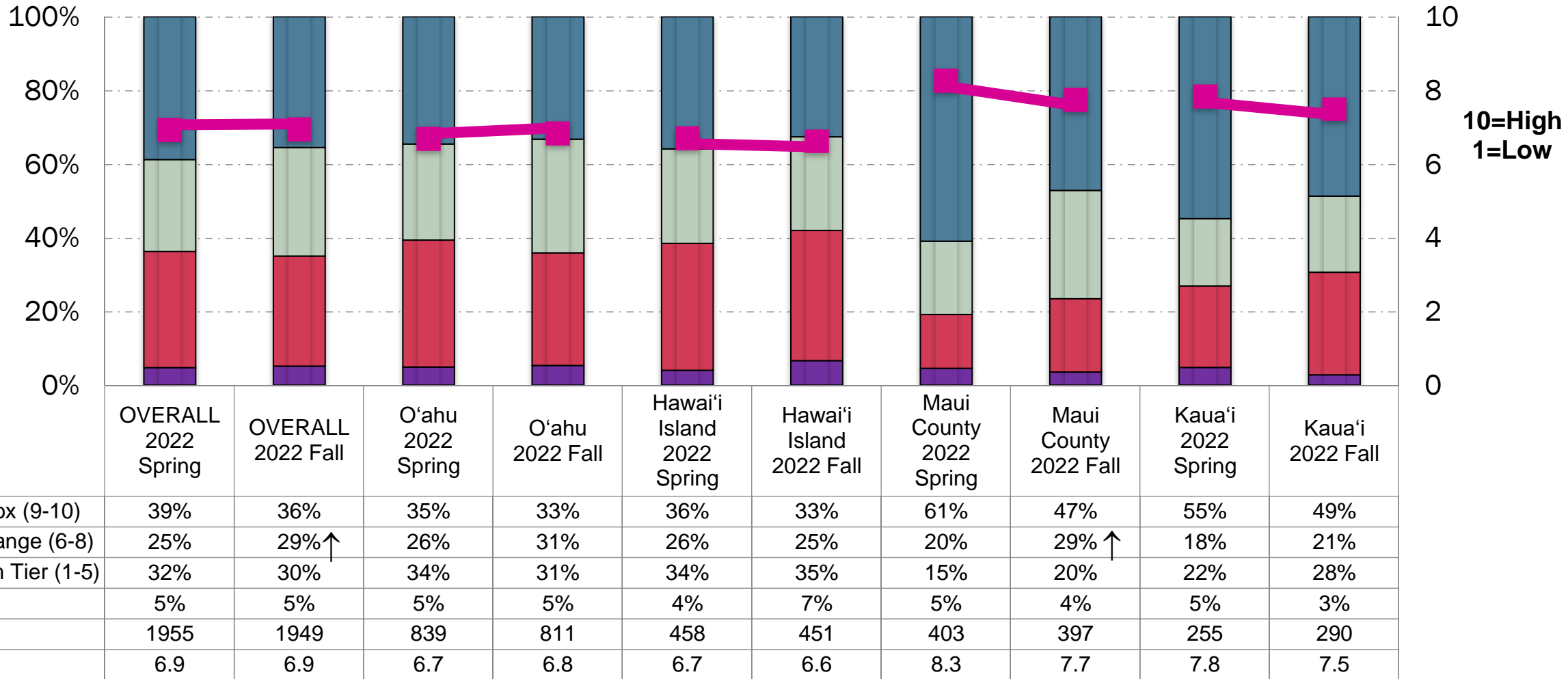
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Eliminate illegal vacation rentals on my island” – *By Demographics*



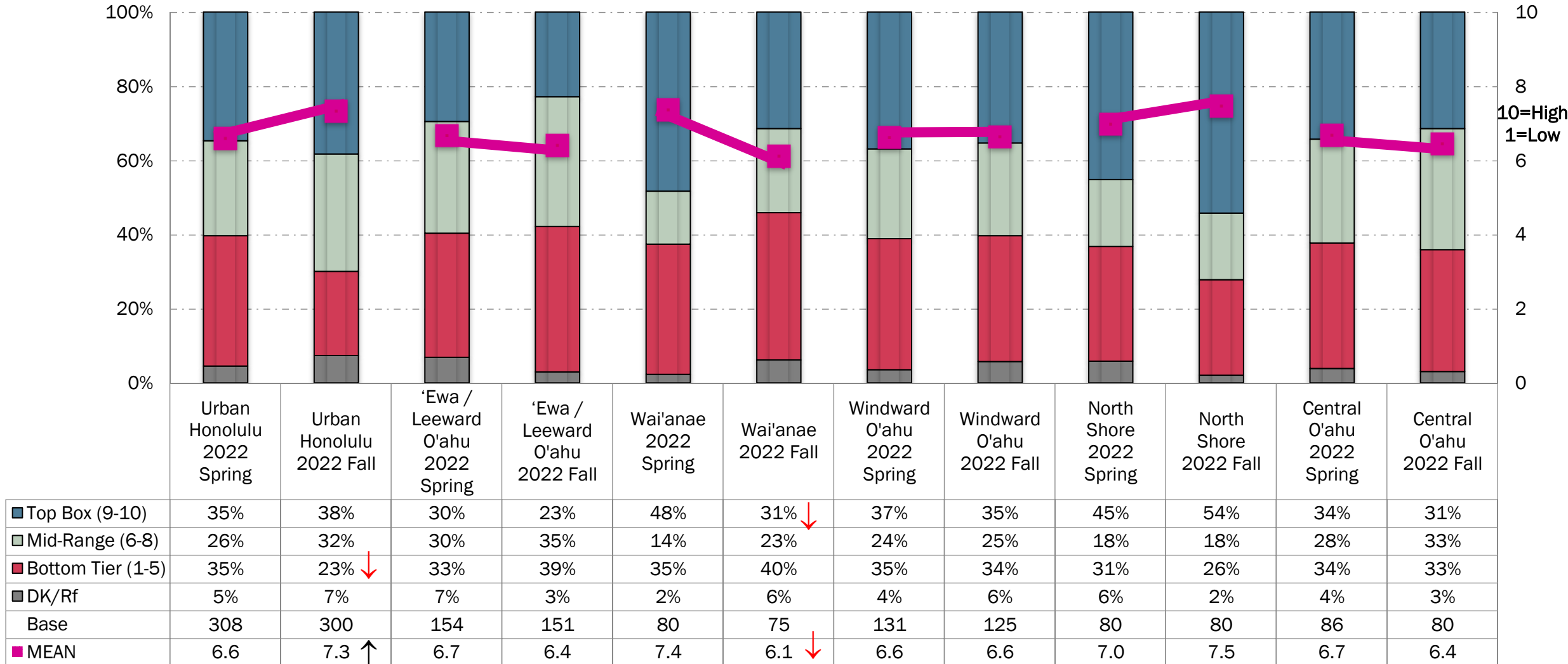
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Stop approval of additional legal vacation rentals on my island” – *By County*



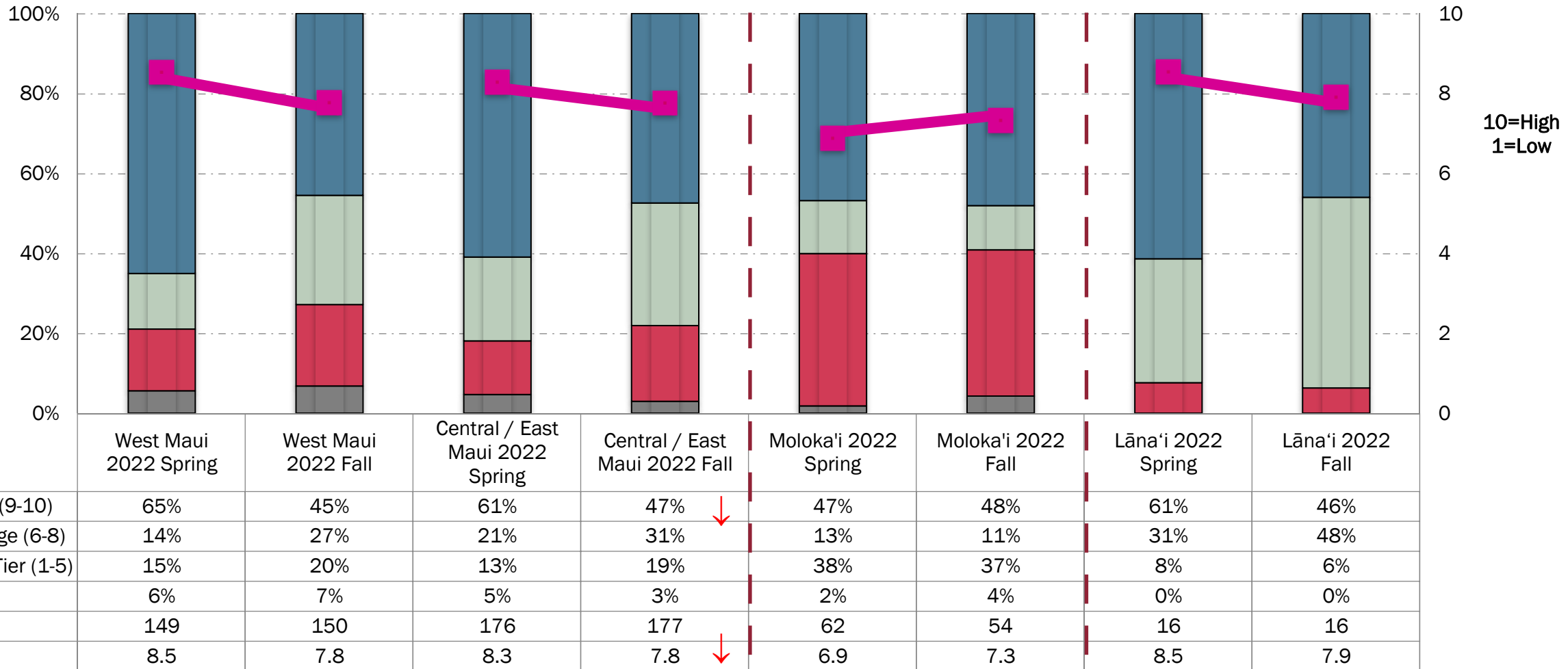
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Stop approval of additional legal vacation rentals on my island” – By Area (O’ahu)



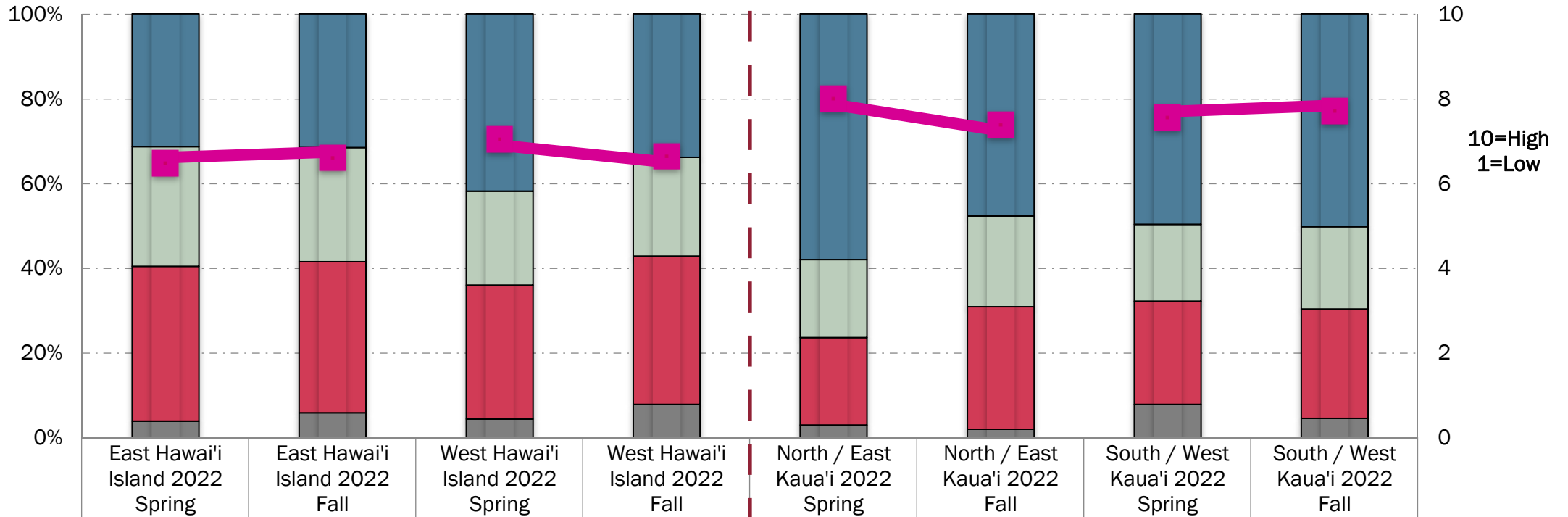
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Stop approval of additional legal vacation rentals on my island” – By Area (Maui County)



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

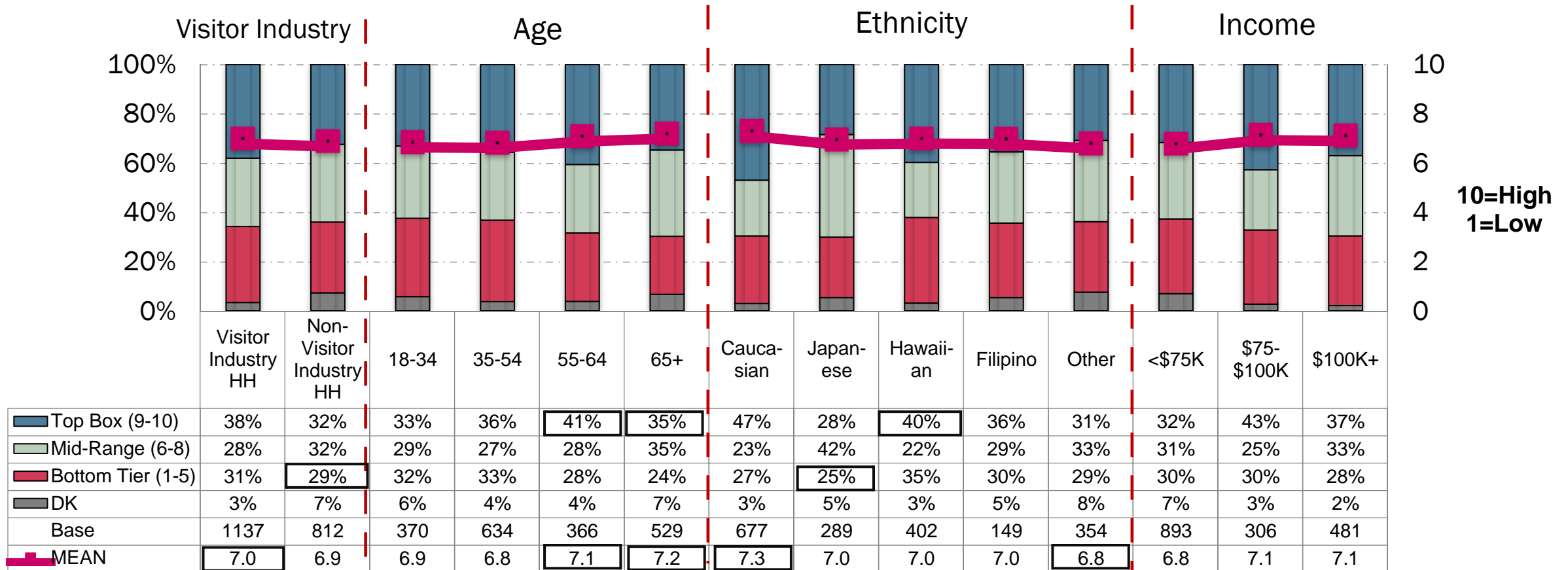
“Stop approval of additional legal vacation rentals on my island” – By Area (Hawai'i Island & Kaua'i)



	East Hawai'i Island 2022 Spring	East Hawai'i Island 2022 Fall	West Hawai'i Island 2022 Spring	West Hawai'i Island 2022 Fall	North / East Kaua'i 2022 Spring	North / East Kaua'i 2022 Fall	South / West Kaua'i 2022 Spring	South / West Kaua'i 2022 Fall
■ Top Box (9-10)	31%	32%	42%	34%	58%	48%	50%	50%
■ Mid-Range (6-8)	28%	27%	22%	23%	18%	21%	18%	19%
■ Bottom Tier (1-5)	36%	36%	32%	35%	21%	29%	24%	26%
■ DK/Rf	4%	6%	4%	8%	3%	2%	8%	4%
Base	233	226	225	225	148	145	107	145
■ MEAN	6.5	6.6	7.0	6.6	8.0	7.4	7.6	7.7

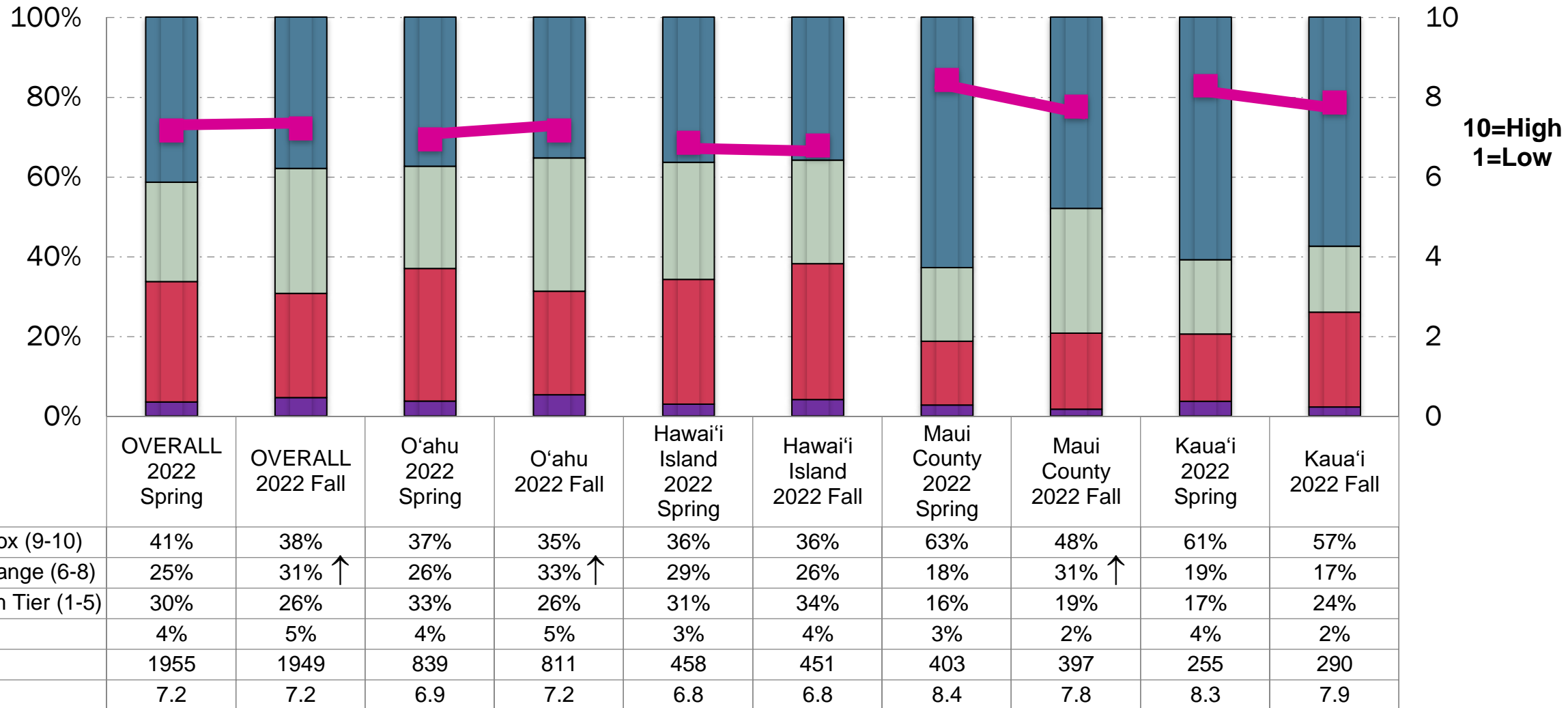
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Stop approval of additional legal vacation rentals on my island” – By Demographics



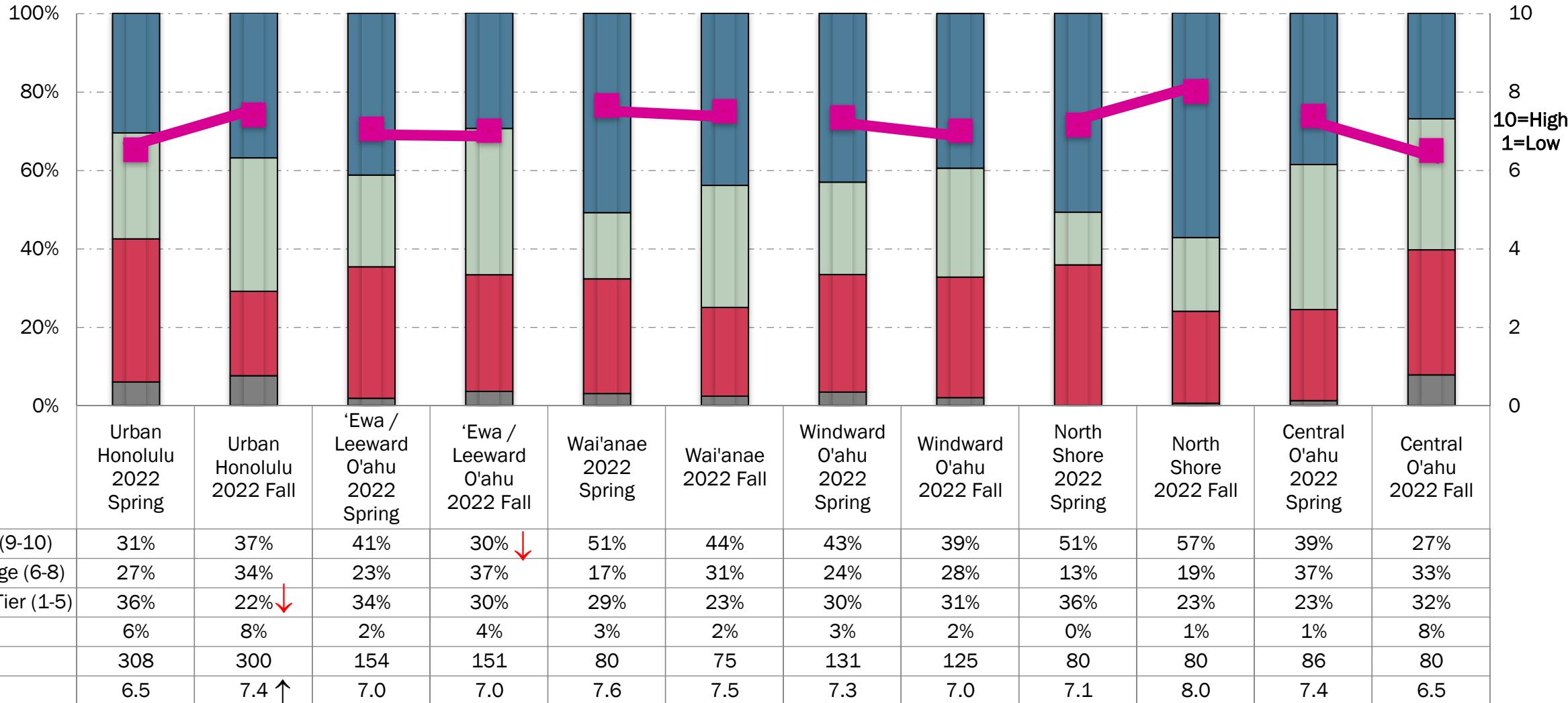
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Do not allow building of additional hotel/condo/timeshare units on my island” – *By County*



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Do not allow building of additional hotel/condo/timeshare units on my island” - *By Area (O‘ahu)*

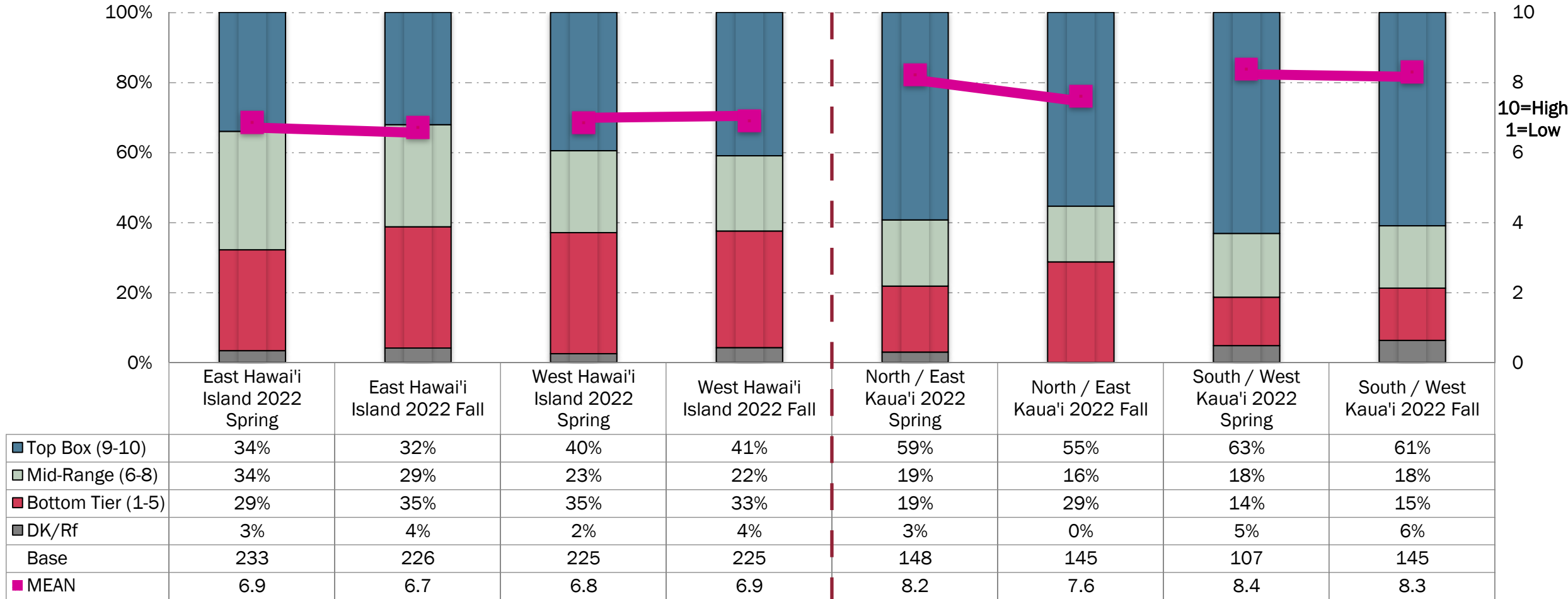


“Do not allow building of additional hotel/condo/timeshare units on my island” - *By Area (Maui County)*



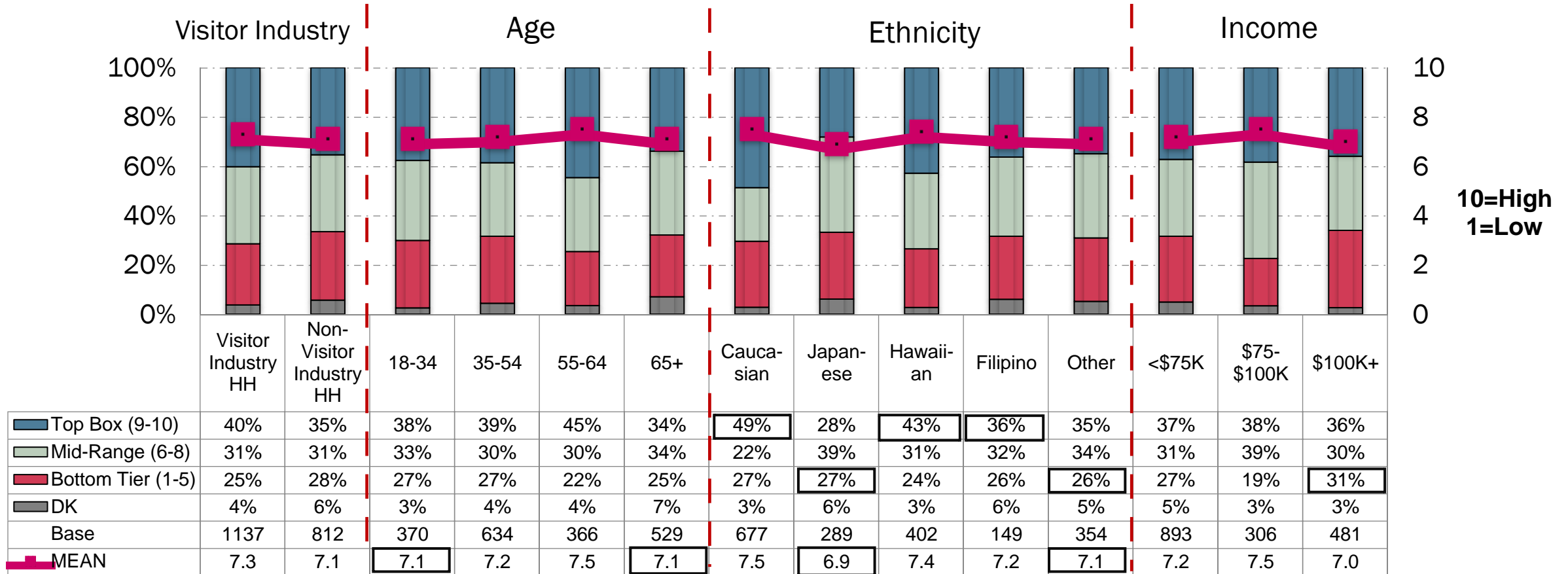
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Do not allow building of additional hotel/condo/timeshare units on my island” - *By Area (Hawai'i Island & Kaua'i)*



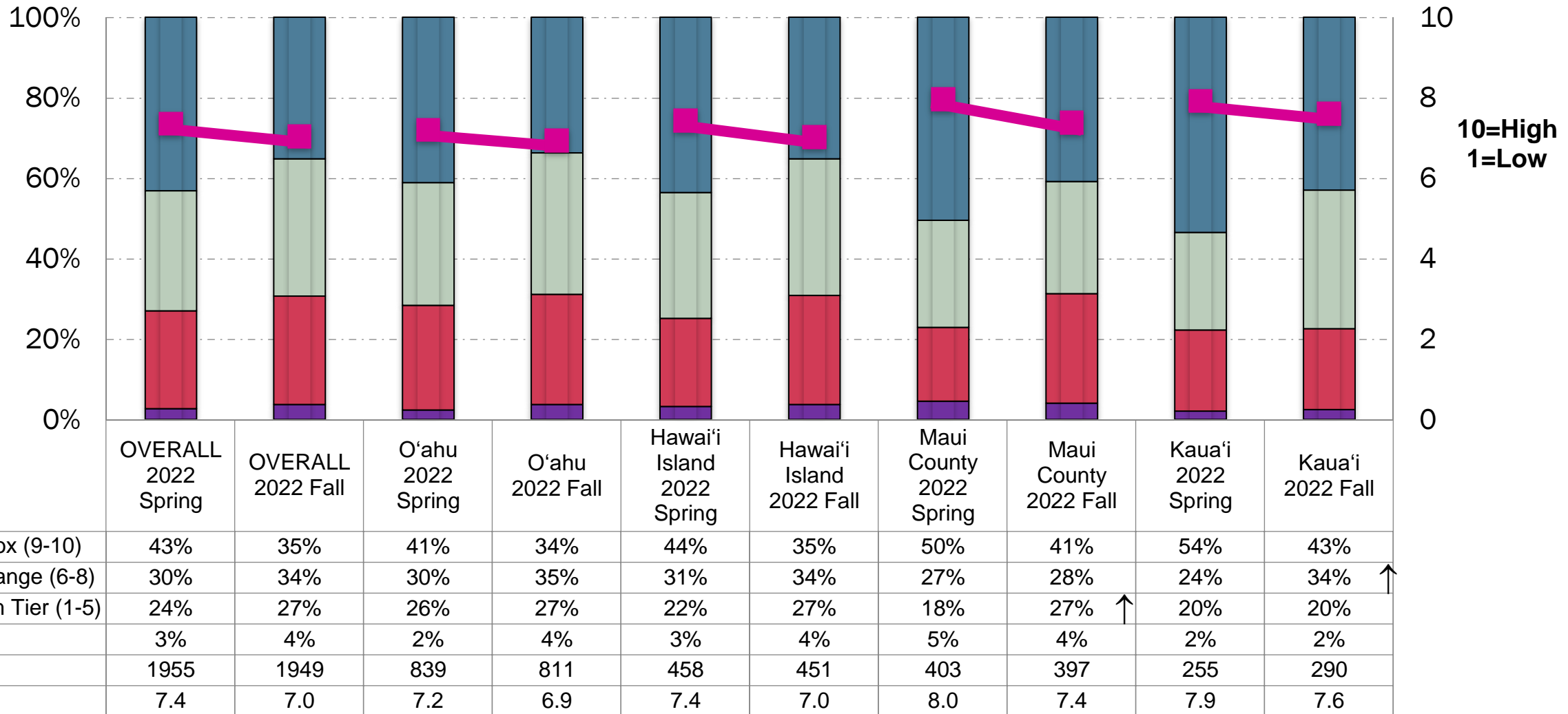
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Do not allow building of additional hotel/condo/timeshare units on my island” – *By Demographics*



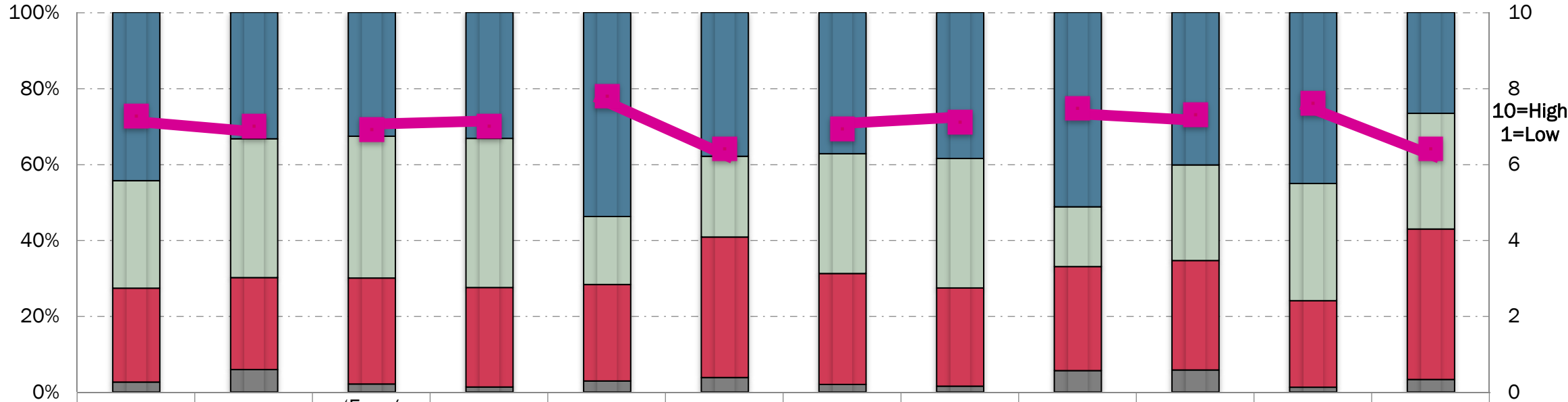
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Charge visitor access fees to state parks and trails” – *By County*



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Charge visitor access fees to state parks and trails” - *By Area (O’ahu)*

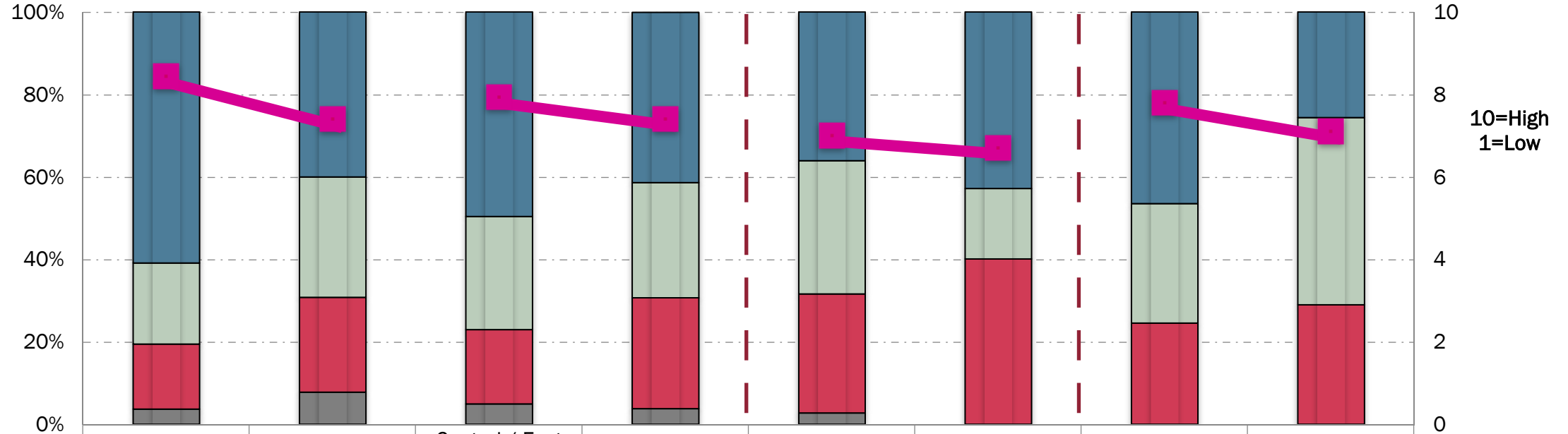


	Urban Honolulu 2022 Spring	Urban Honolulu 2022 Fall	'Ewa / Leeward O'ahu 2022 Spring	'Ewa / Leeward O'ahu 2022 Fall	Wai'anae 2022 Spring	Wai'anae 2022 Fall	Windward O'ahu 2022 Spring	Windward O'ahu 2022 Fall	North Shore 2022 Spring	North Shore 2022 Fall	Central O'ahu 2022 Spring	Central O'ahu 2022 Fall
■ Top Box (9-10)	44%	33% ↓	33%	33%	54%	38%	37%	39%	51%	40%	45%	27% ↓
■ Mid-Range (6-8)	28%	37%	37%	39%	18%	21%	32%	34%	16%	25%	31%	31%
■ Bottom Tier (1-5)	25%	24%	28%	26%	25%	37%	29%	26%	27%	29%	23%	40%
■ DK/Rf	3%	6%	2%	1%	3%	4%	2%	2%	6%	6%	1%	3%
Base	308	300	154	151	80	75	131	125	80	80	86	80
■ MEAN	7.3	7.0	6.9	7.0	7.8	6.4 ↓	6.9	7.1	7.5	7.3	7.6	6.4 ↓

Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Charge visitor access fees to state parks and trails”

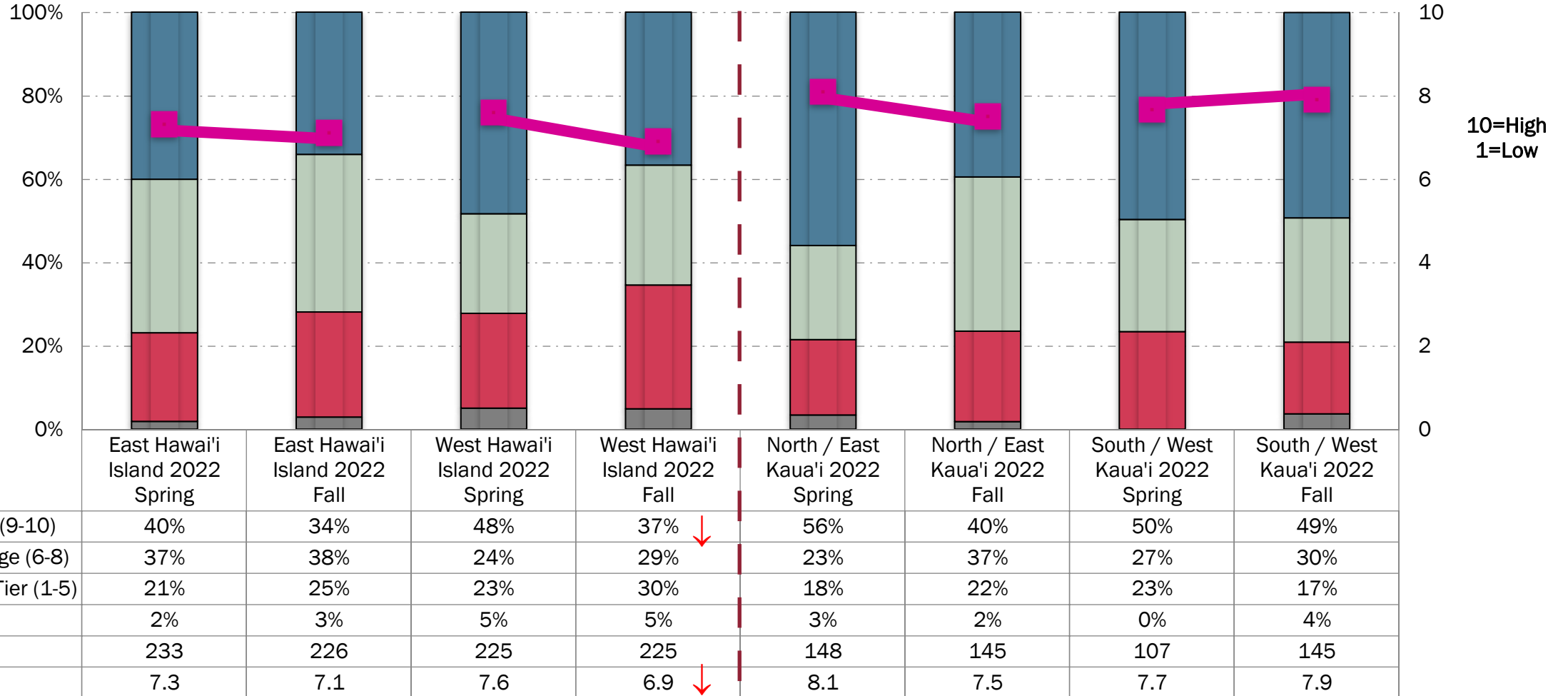
- *By Area (Maui County)*



	West Maui 2022 Spring	West Maui 2022 Fall	Central / East Maui 2022 Spring	Central / East Maui 2022 Fall	Moloka'i 2022 Spring	Moloka'i 2022 Fall	Lāna'i 2022 Spring	Lāna'i 2022 Fall
■ Top Box (9-10)	61%	40% ↓	50%	41%	36%	43%	46%	26%
■ Mid-Range (6-8)	20%	29%	27%	28%	32%	17%	29%	45%
■ Bottom Tier (1-5)	16%	23%	18%	27%	29%	40%	25%	29%
■ DK/Rf	4%	8%	5%	4%	3%	0%	0%	0%
Base	149	150	176	177	62	54	16	16
■ MEAN	8.4	7.4 ↓	7.9	7.4	7.0	6.7	7.8	7.1

“Charge visitor access fees to state parks and trails”

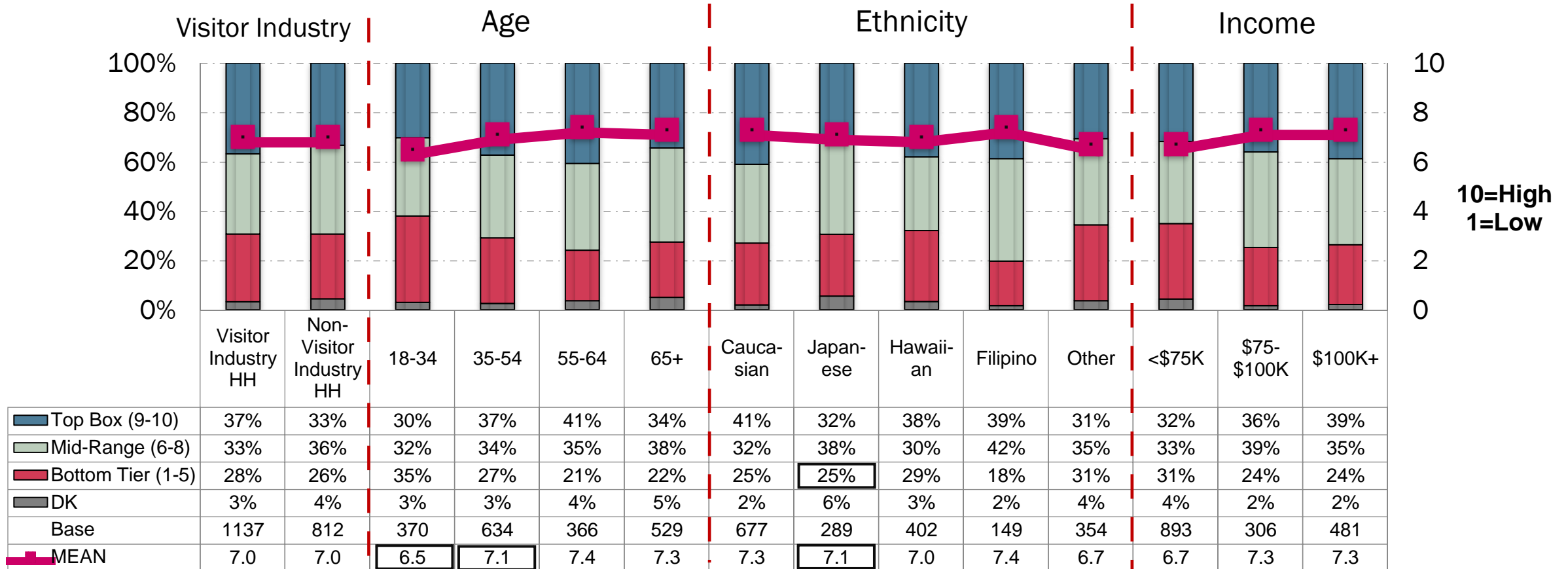
- *By Area (Hawai‘i Island & Kaua‘i)*



Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

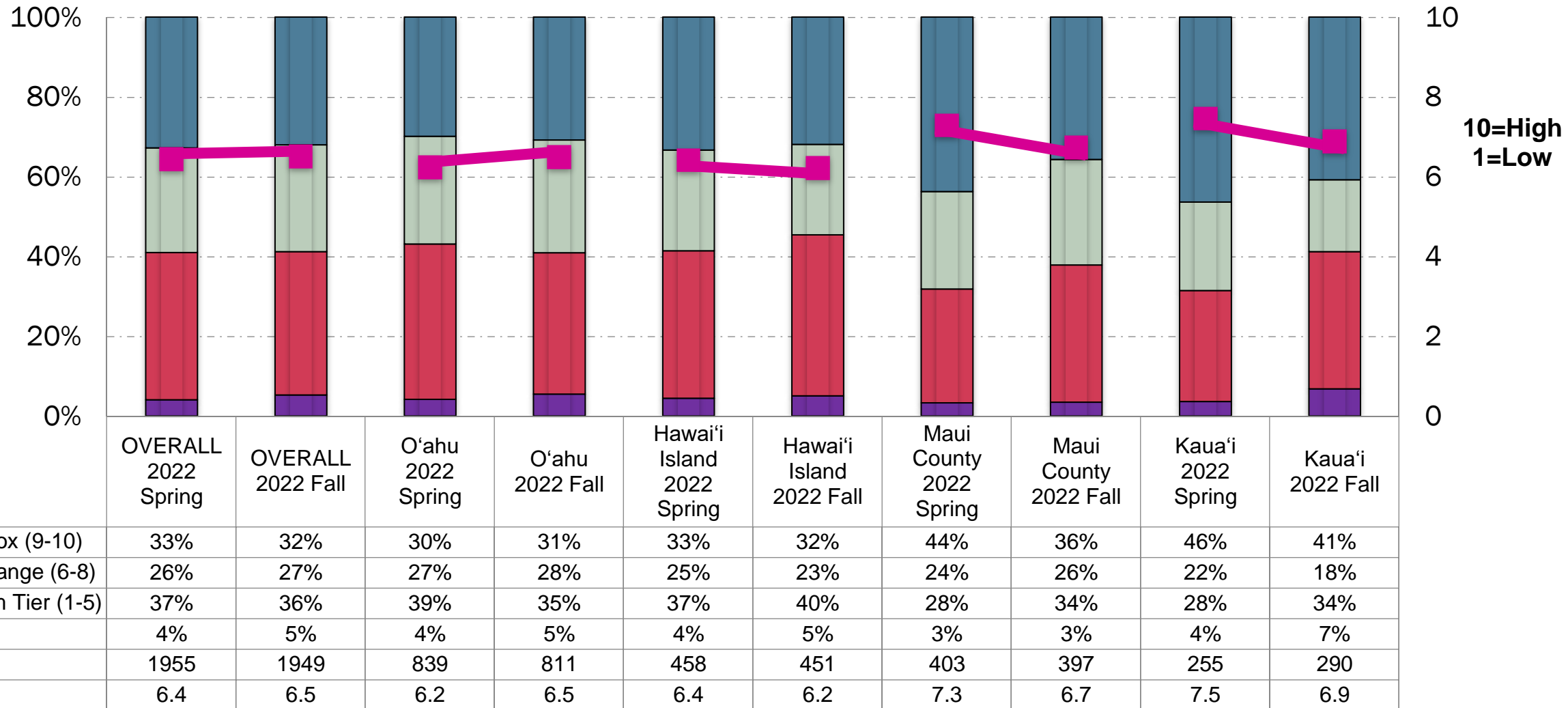
“Charge visitor access fees to state parks and trails”

– *By Demographics*



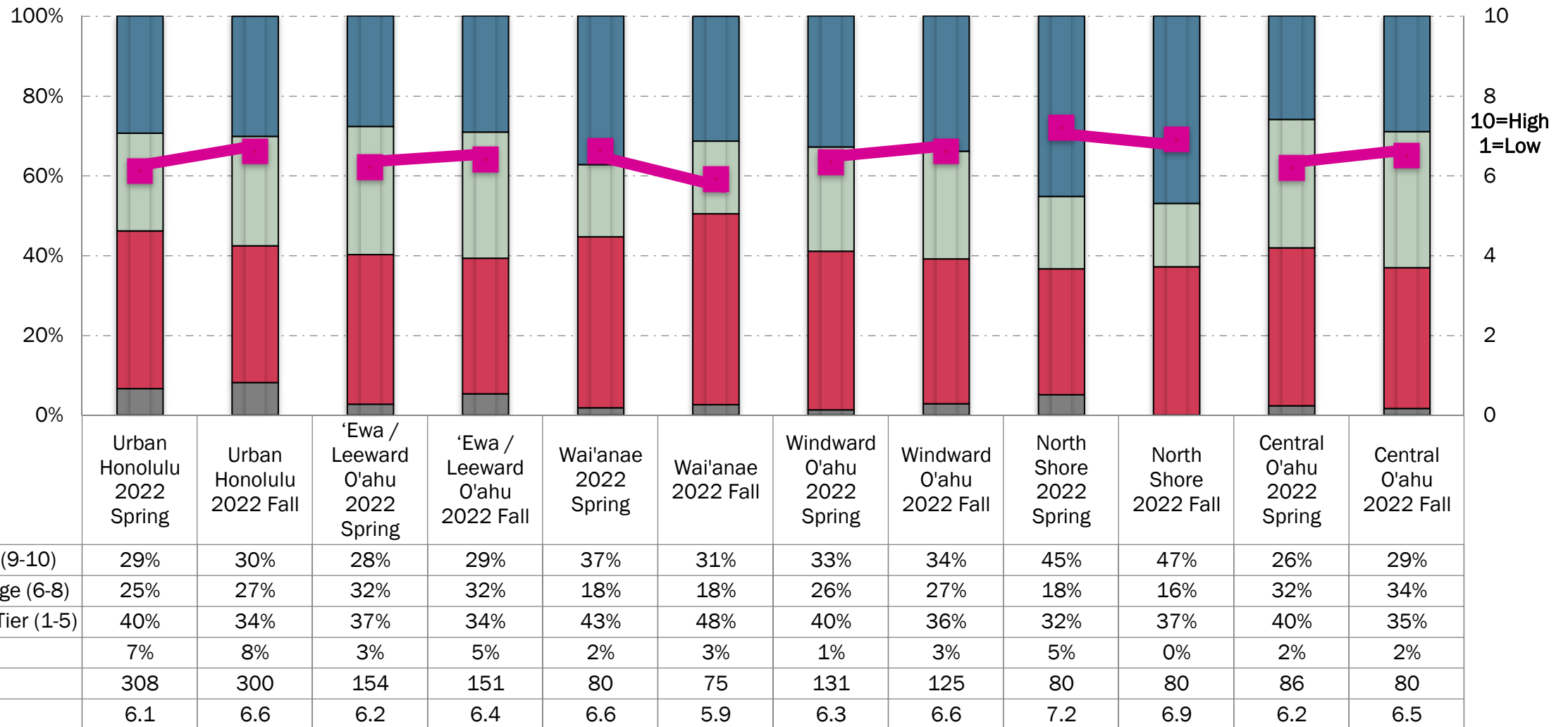
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Designate resident-only days of the week at some state parks, beaches and trails” – *By County*



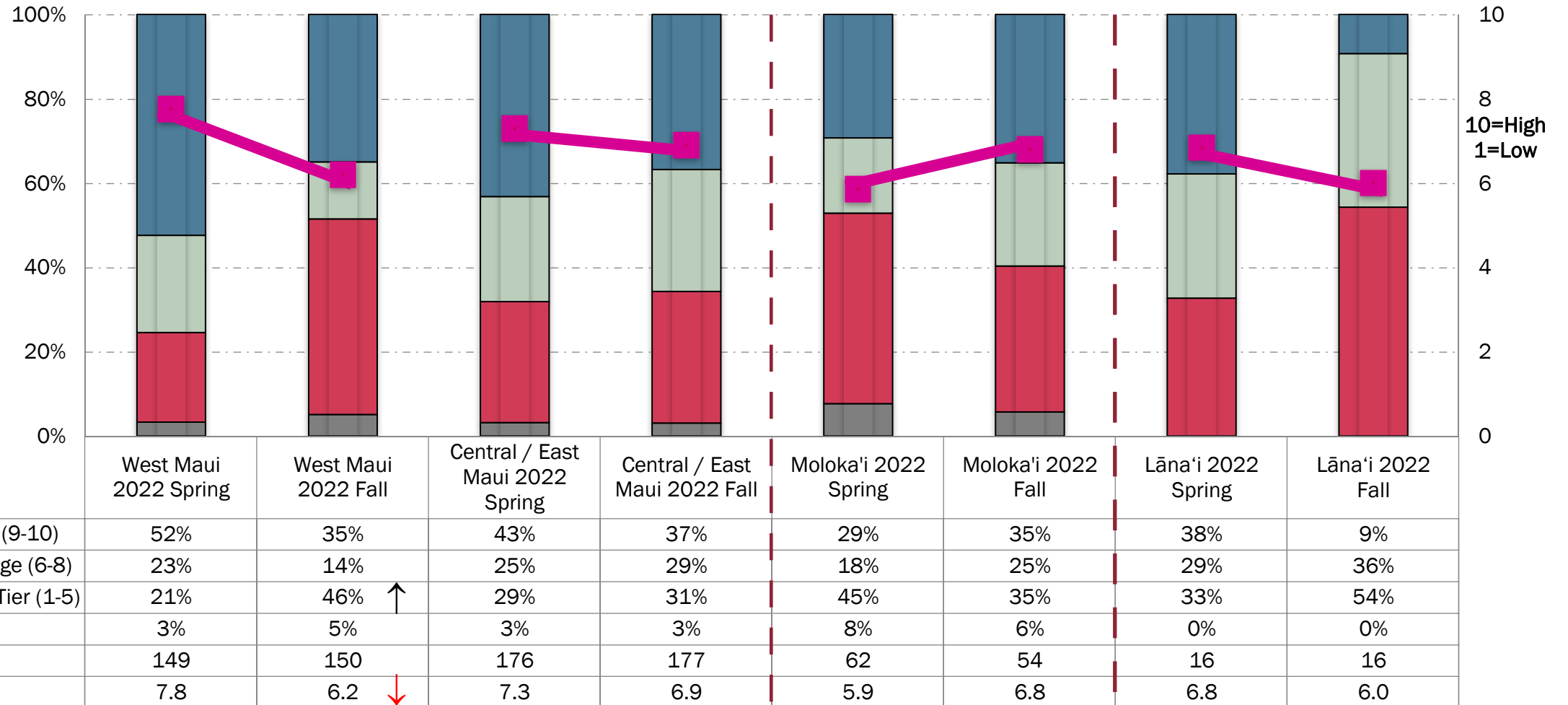
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Designate resident-only days of the week at some state parks, beaches and trails” - *By Area (O‘ahu)*



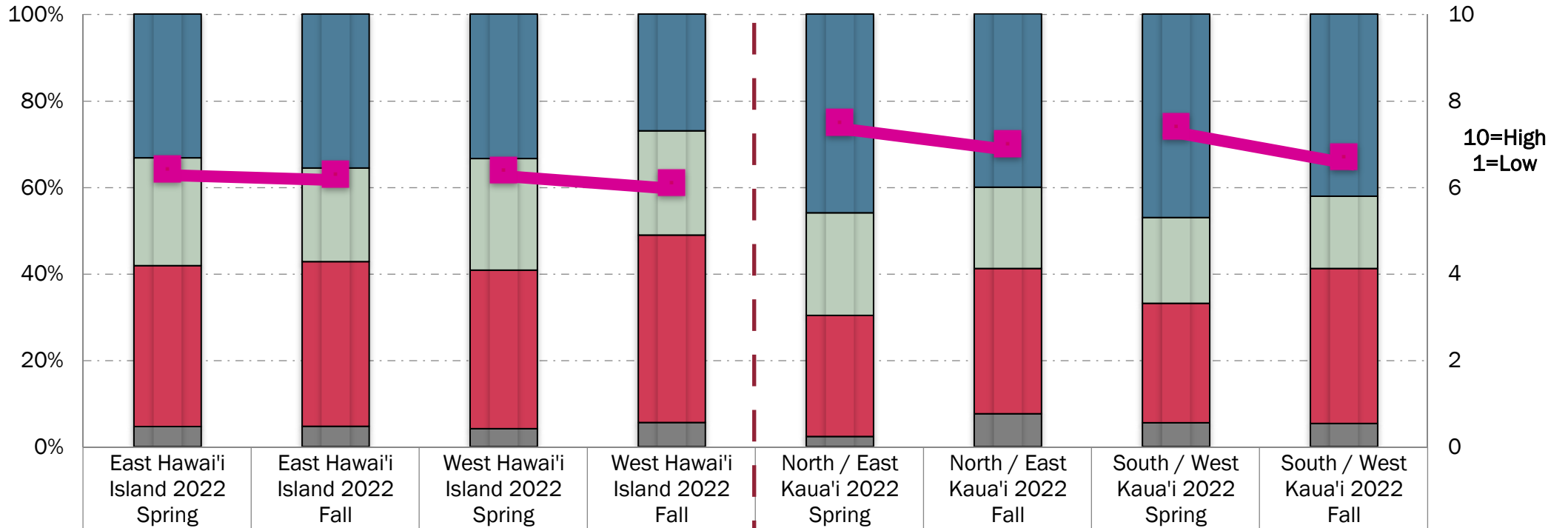
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Designate resident-only days of the week at some state parks, beaches and trails” - *By Area (Maui County)*



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

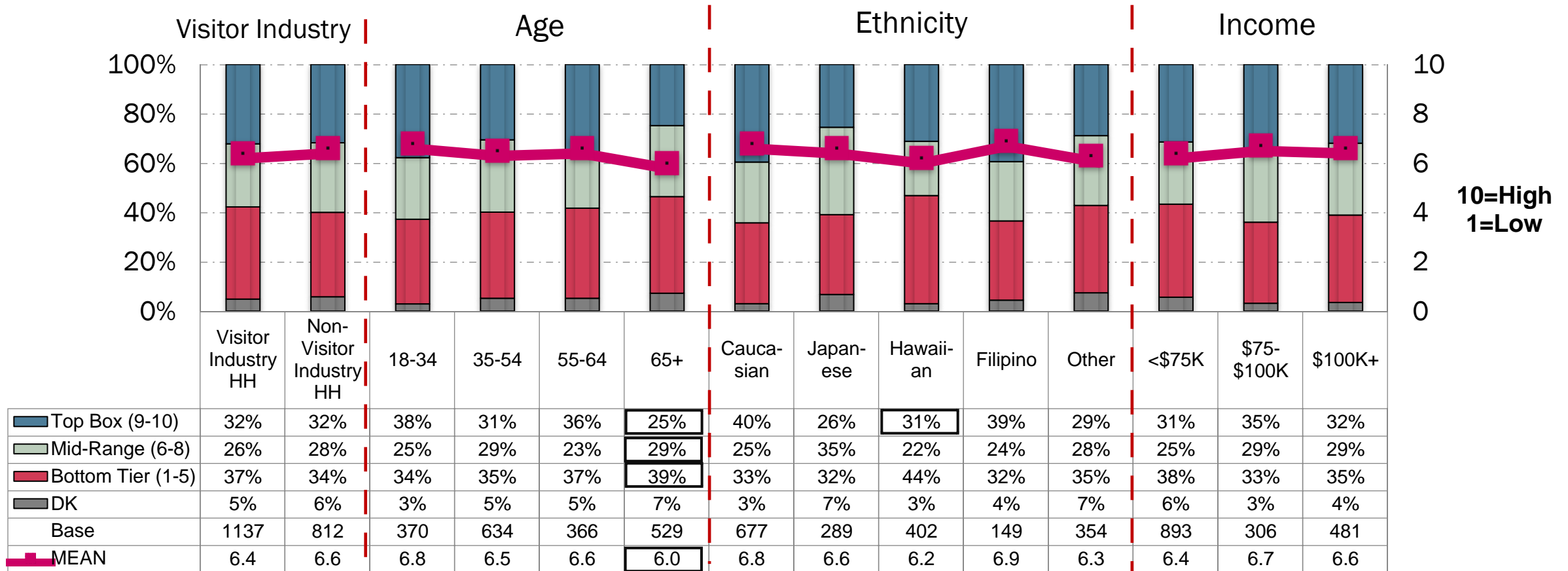
“Designate resident-only days of the week at some state parks, beaches and trails” - *By Area (Hawai'i Island & Kaua'i)*



	East Hawai'i Island 2022 Spring	East Hawai'i Island 2022 Fall	West Hawai'i Island 2022 Spring	West Hawai'i Island 2022 Fall	North / East Kaua'i 2022 Spring	North / East Kaua'i 2022 Fall	South / West Kaua'i 2022 Spring	South / West Kaua'i 2022 Fall
■ Top Box (9-10)	33%	36%	33%	27%	46%	40%	47%	42%
■ Mid-Range (6-8)	25%	22%	26%	24%	24%	19%	20%	17%
■ Bottom Tier (1-5)	37%	38%	37%	43%	28%	34%	28%	36%
■ DK/Rf	5%	5%	4%	6%	2%	8%	6%	5%
Base	233	226	225	225	148	145	107	145
■ MEAN	6.4	6.3	6.4	6.1	7.5	7.0	7.4	6.7

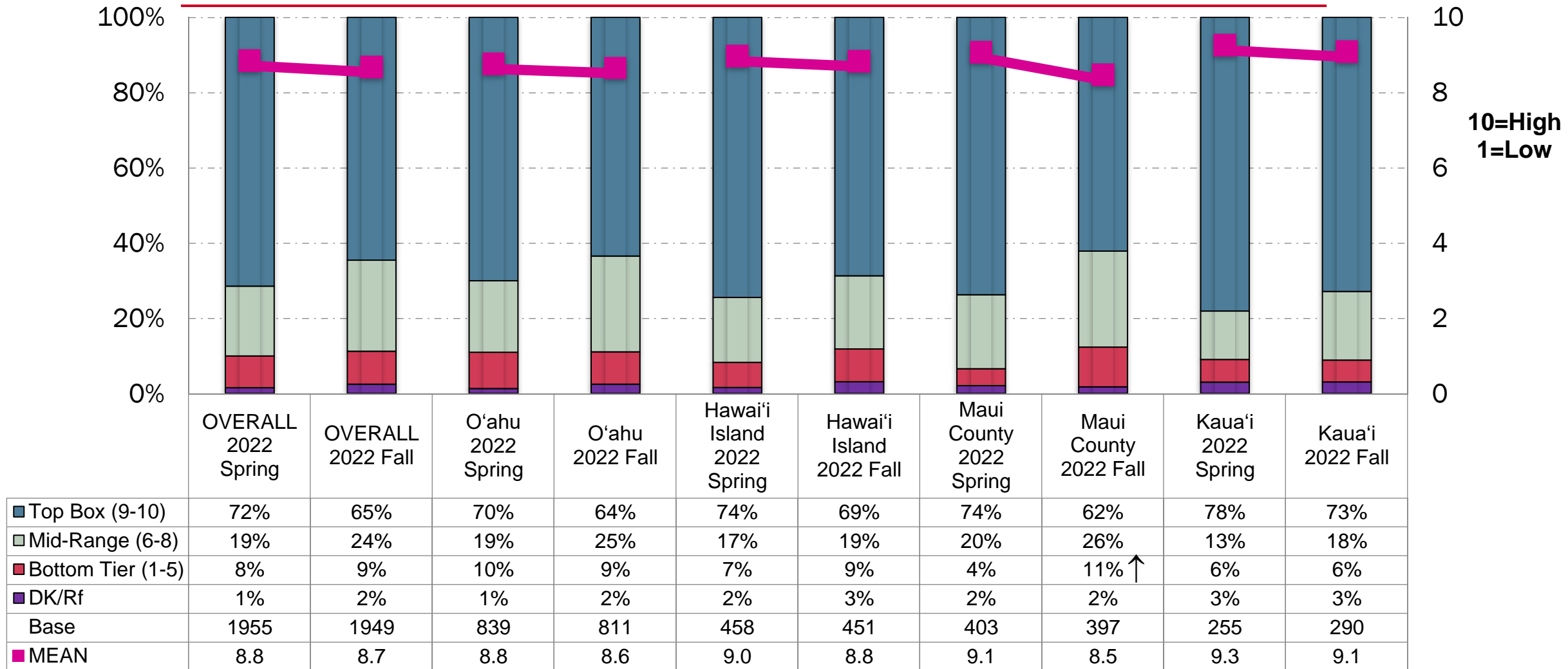
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Designate resident-only days of the week at some state parks, beaches and trails” – *By Demographics*



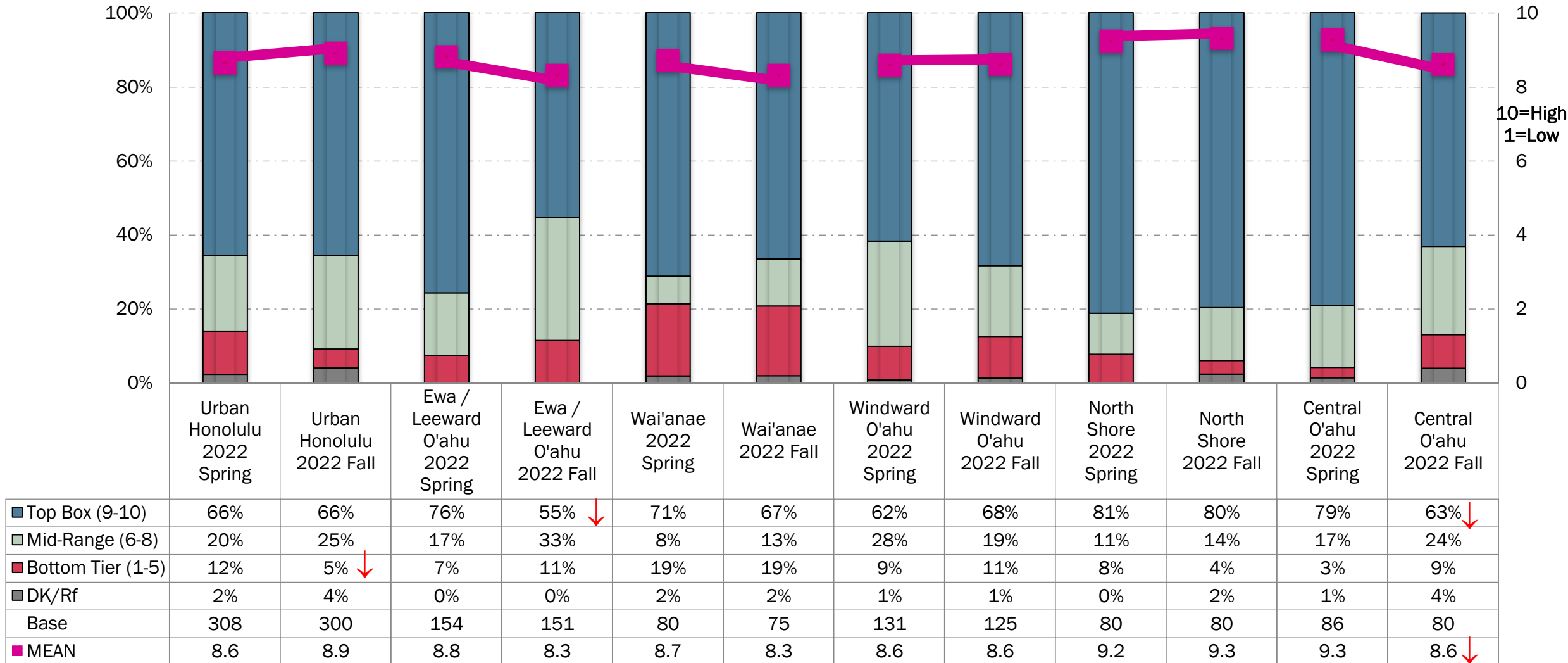
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Educate visitors and residents to mālama the islands and each other” – *By County*



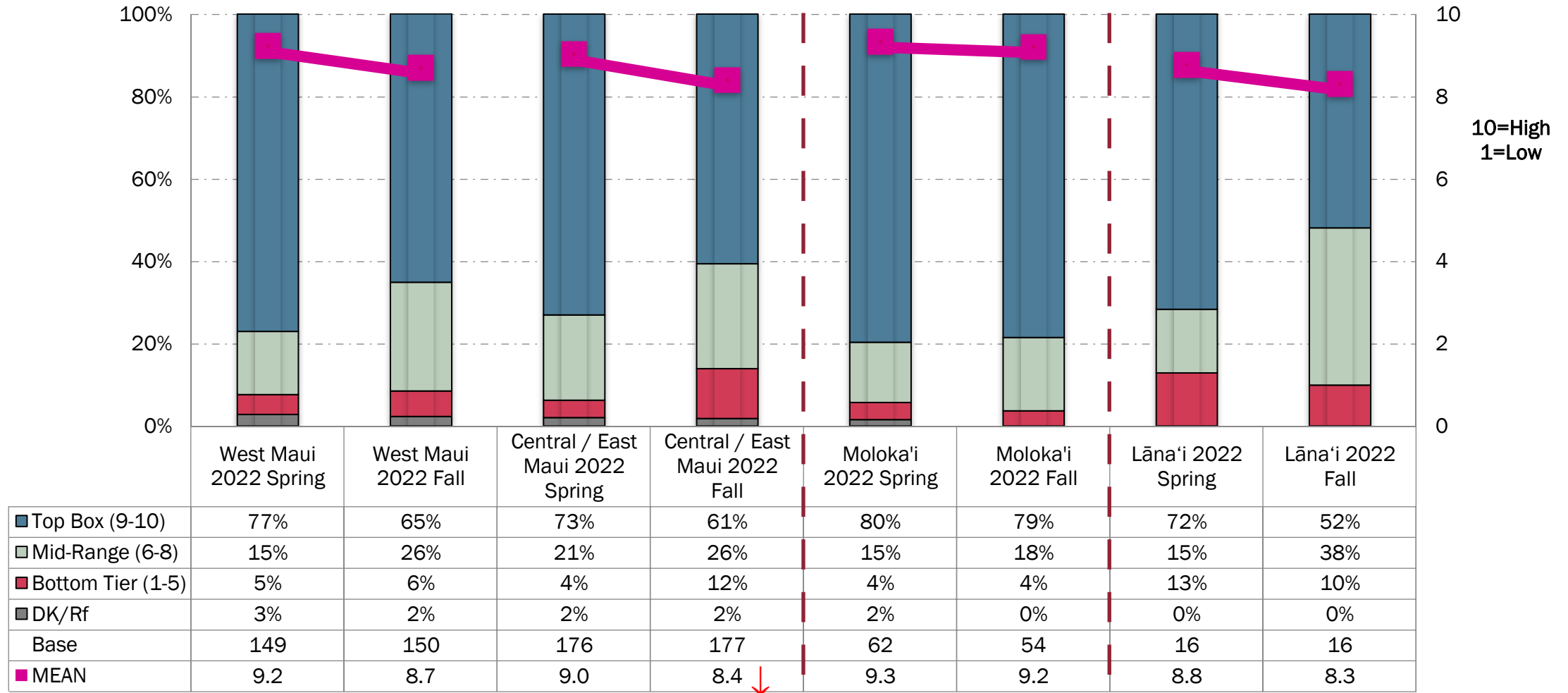
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Educate visitors and residents to mālama the islands and each other” - *By Area (O’ahu)*



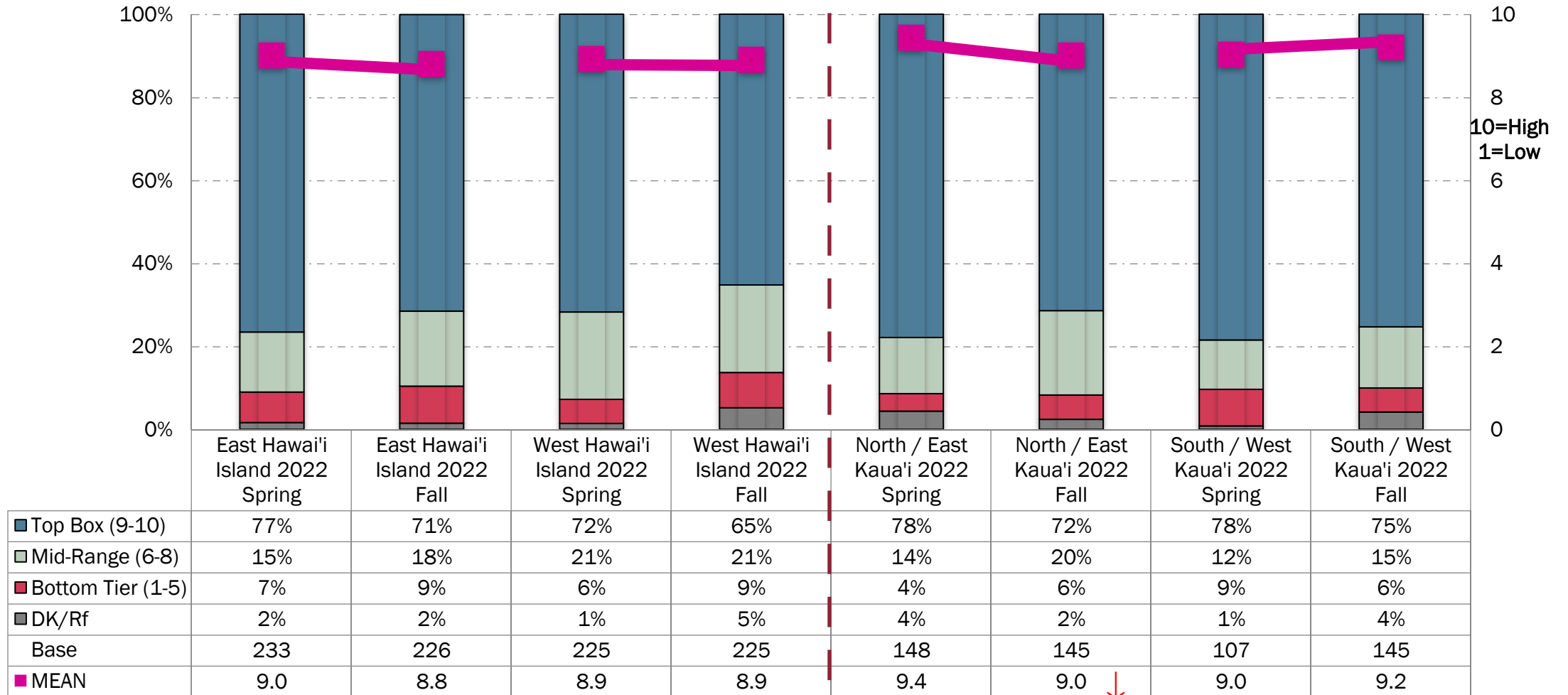
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Educate visitors and residents to mālama the islands and each other” - *By Area (Maui County)*



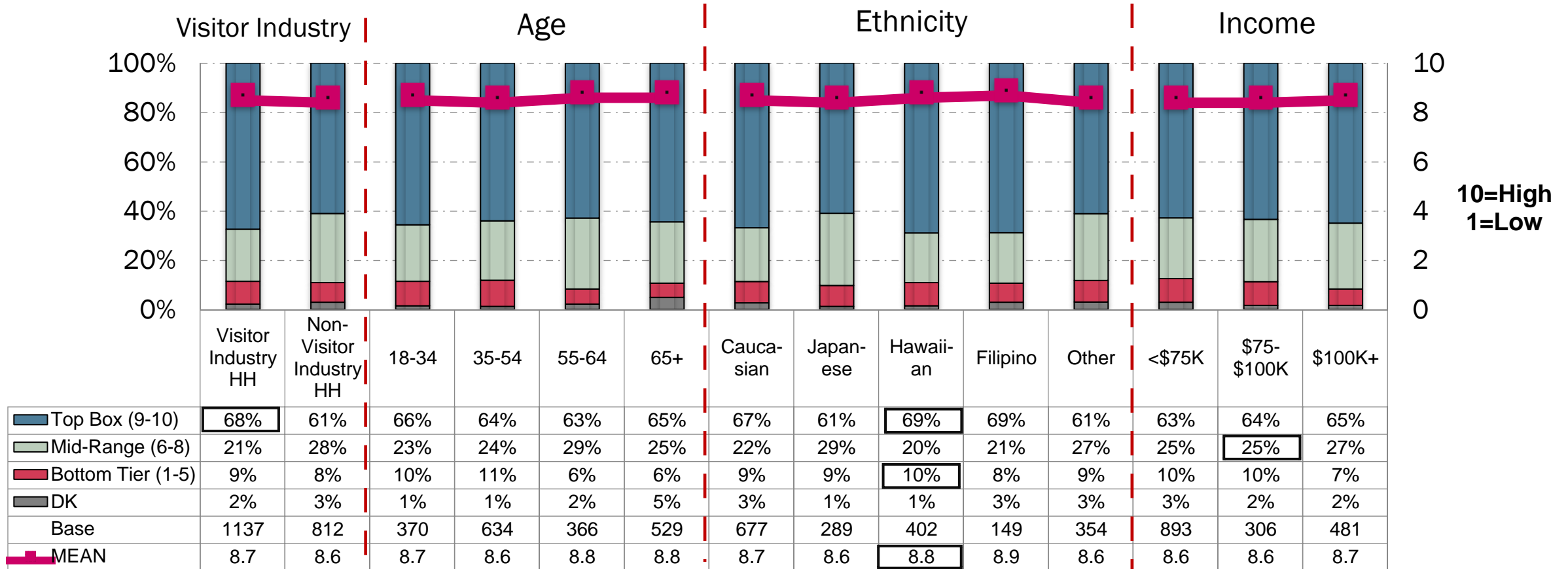
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Educate visitors and residents to mālama the islands and each other” - *By Area (Hawai‘i Island & Kaua‘i)*



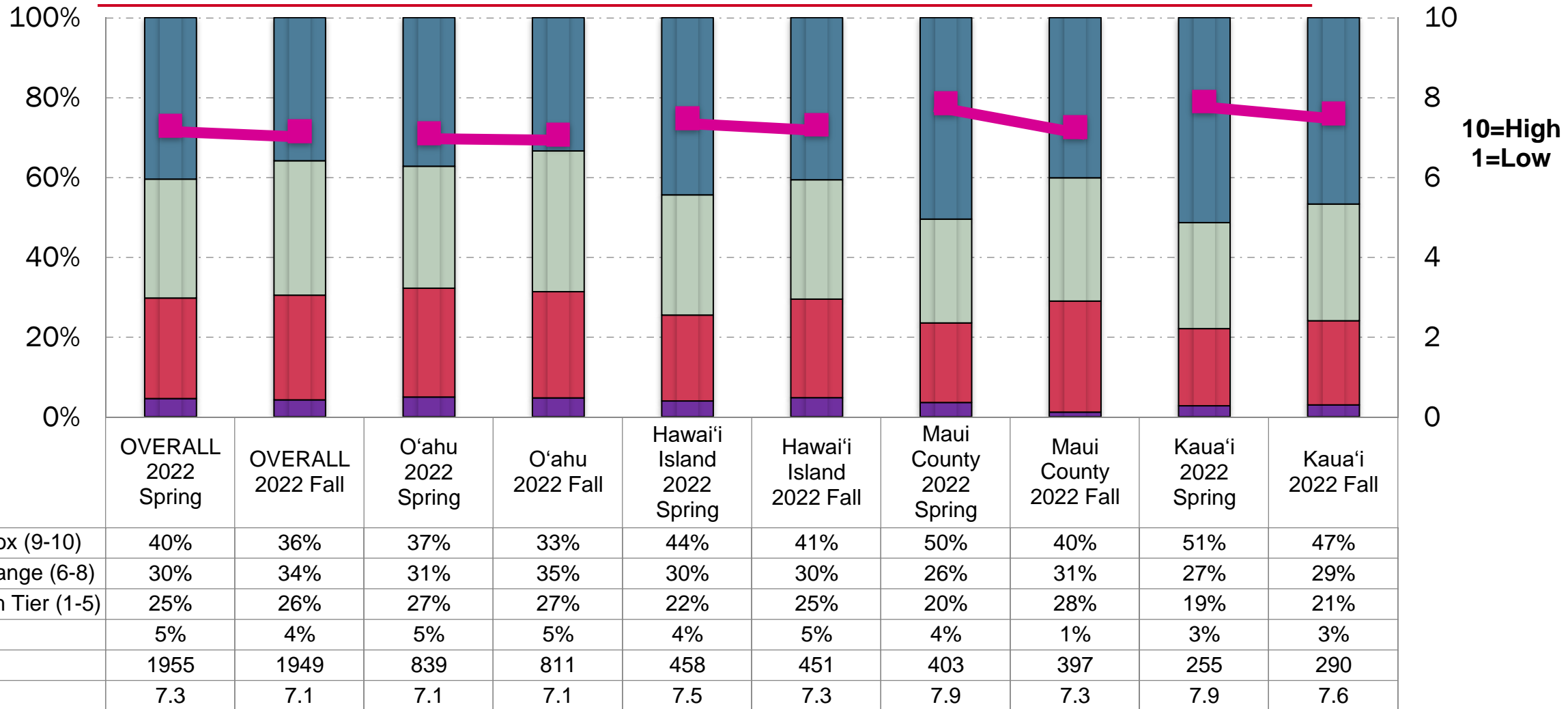
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Educate visitors and residents to mālama the islands and each other” – *By Demographics*



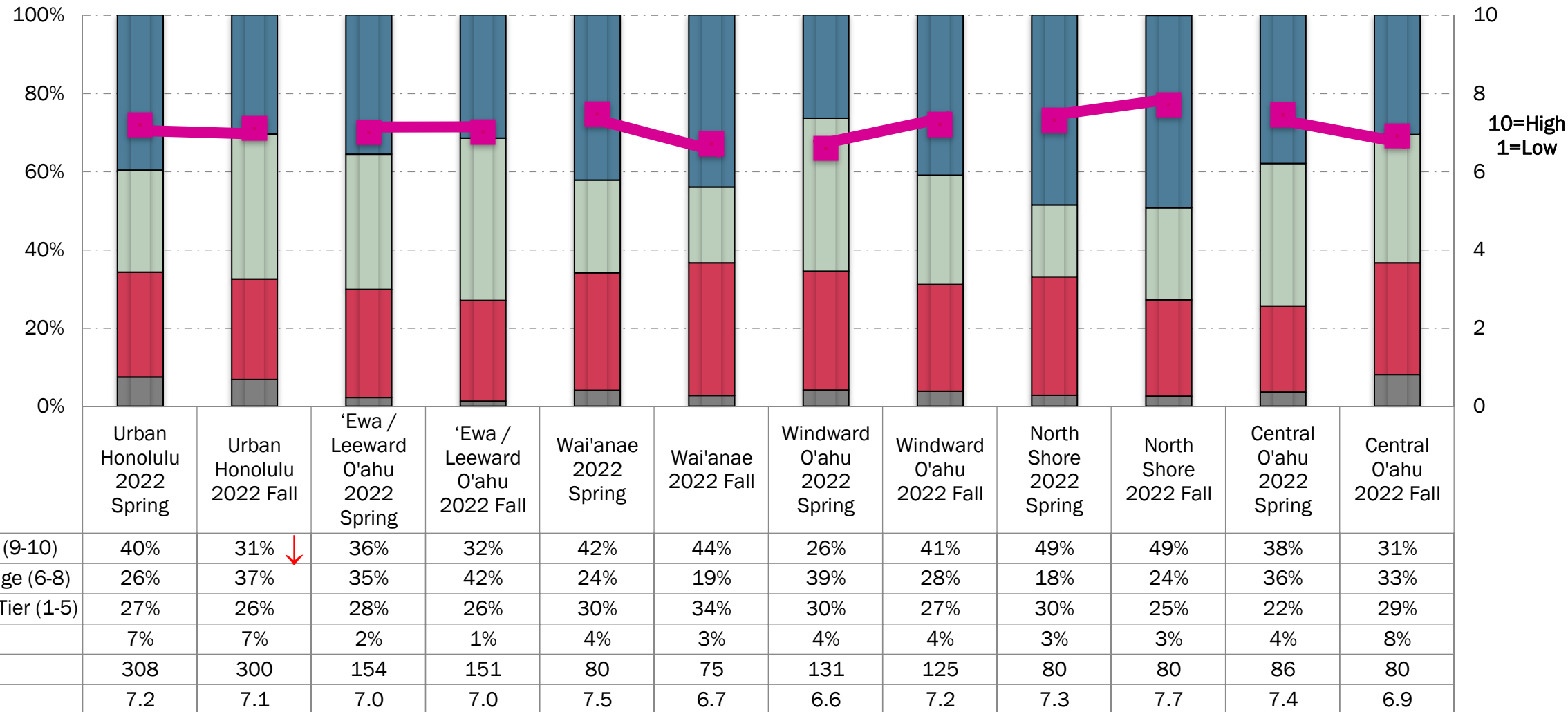
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Encourage visitors to volunteer and give back during their visits to Hawai‘i” – *By County*



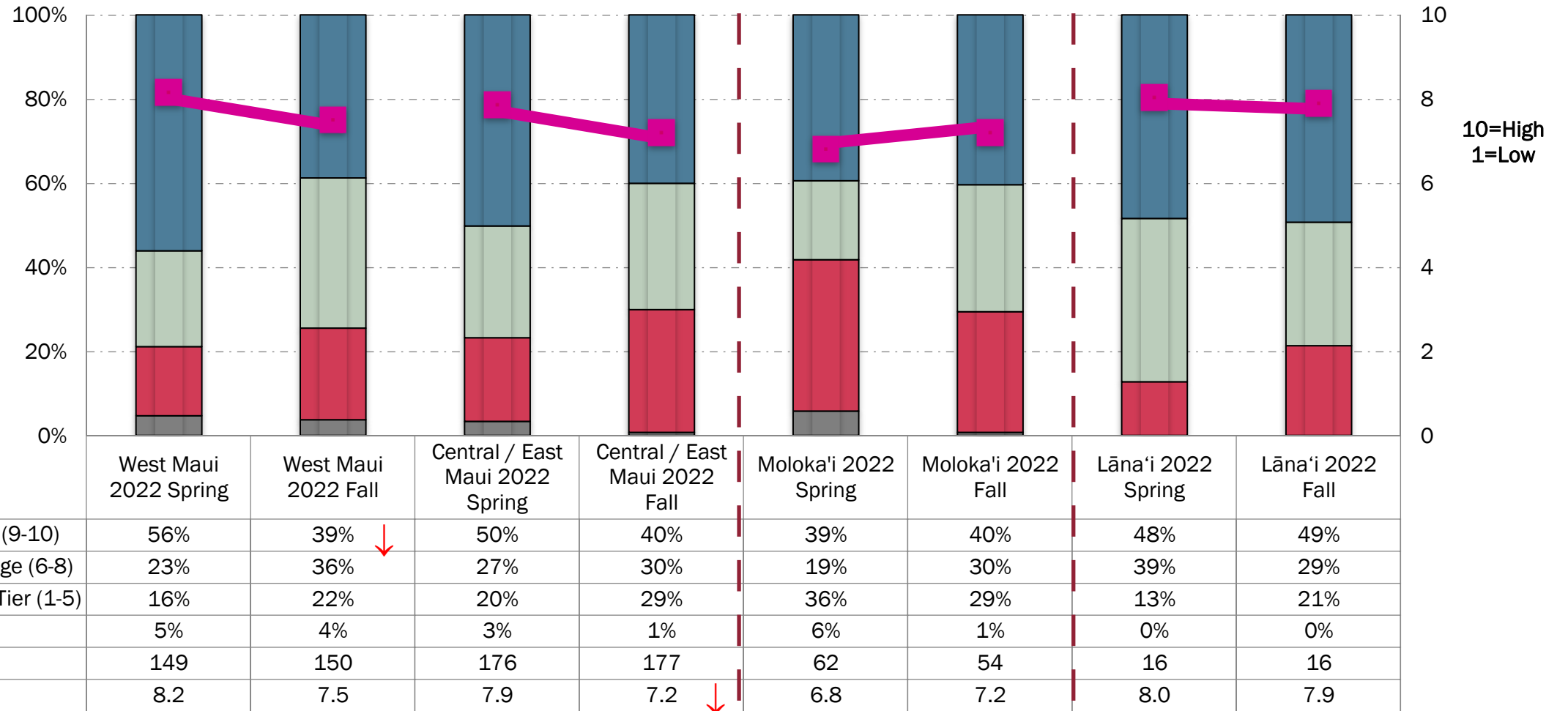
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Encourage visitors to volunteer and give back during their visits to Hawai‘i” - *By Area (O‘ahu)*



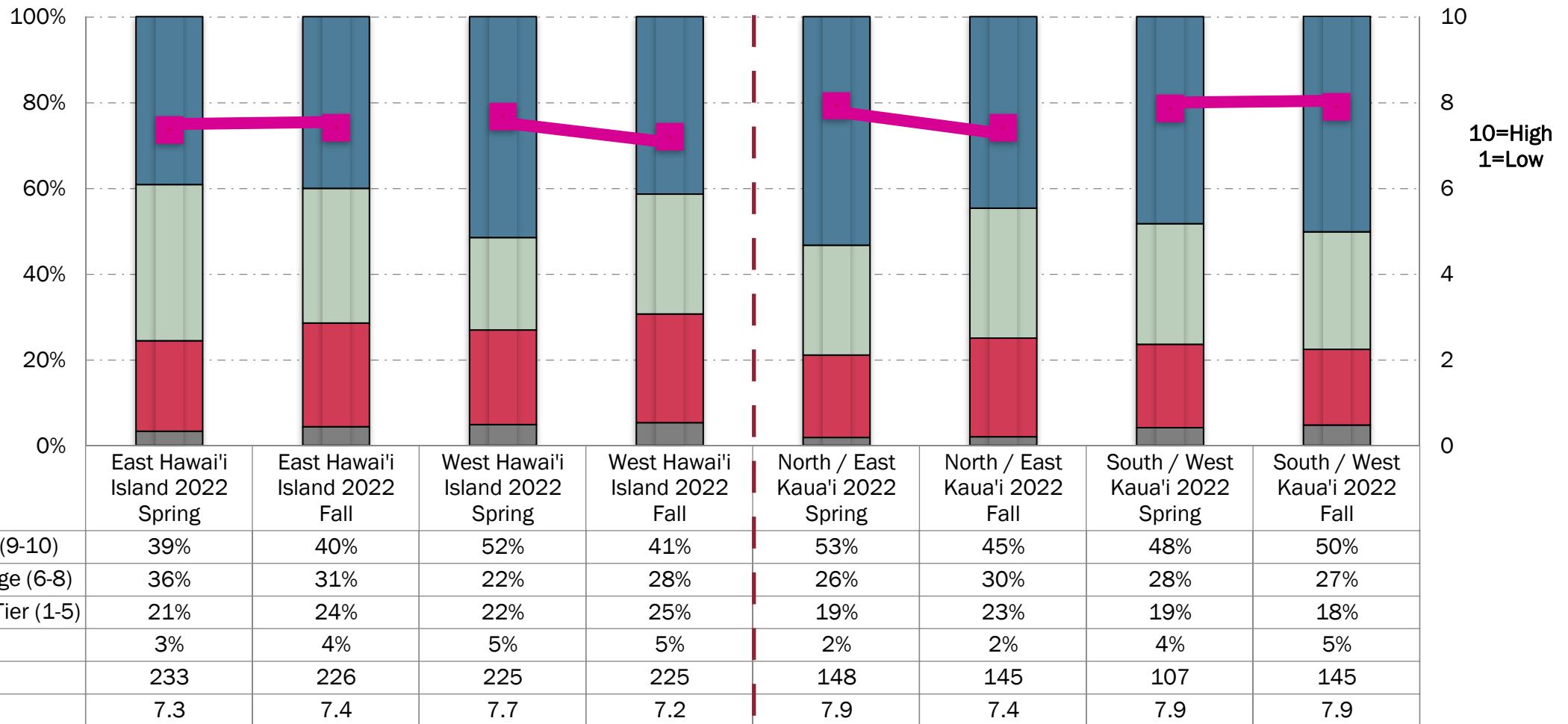
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“Encourage visitors to volunteer and give back during their visits to Hawai‘i” - *By Area (Maui County)*



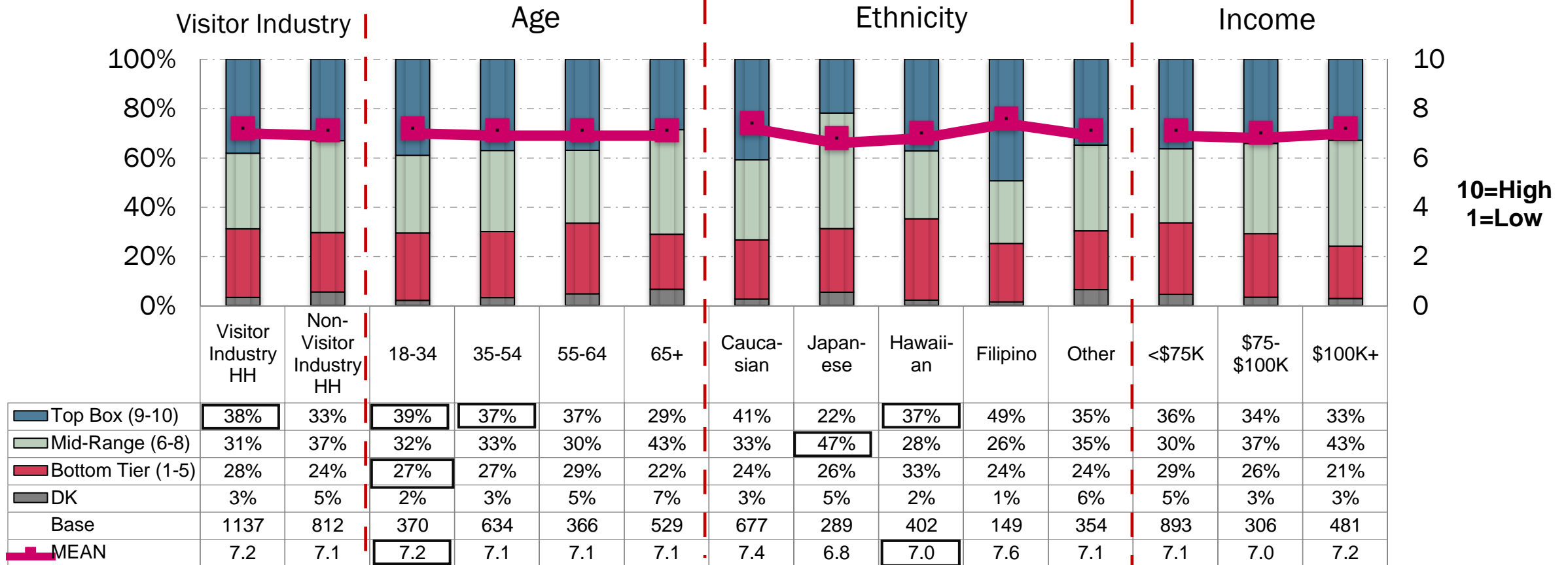
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Encourage visitors to volunteer and give back during their visits to Hawai‘i” - *By Area (Hawai‘i Island & Kaua‘i)*



Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Encourage visitors to volunteer and give back during their visits to Hawai‘i” – *By Demographics*

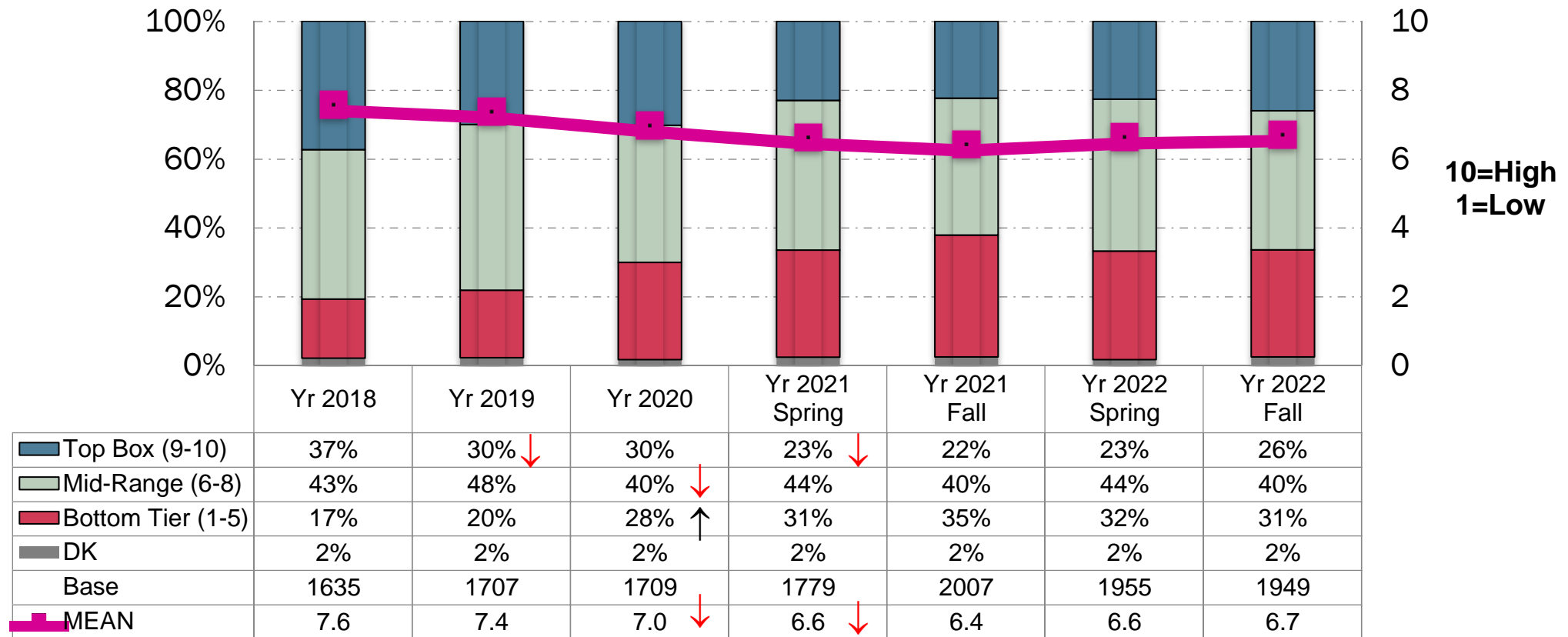


Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



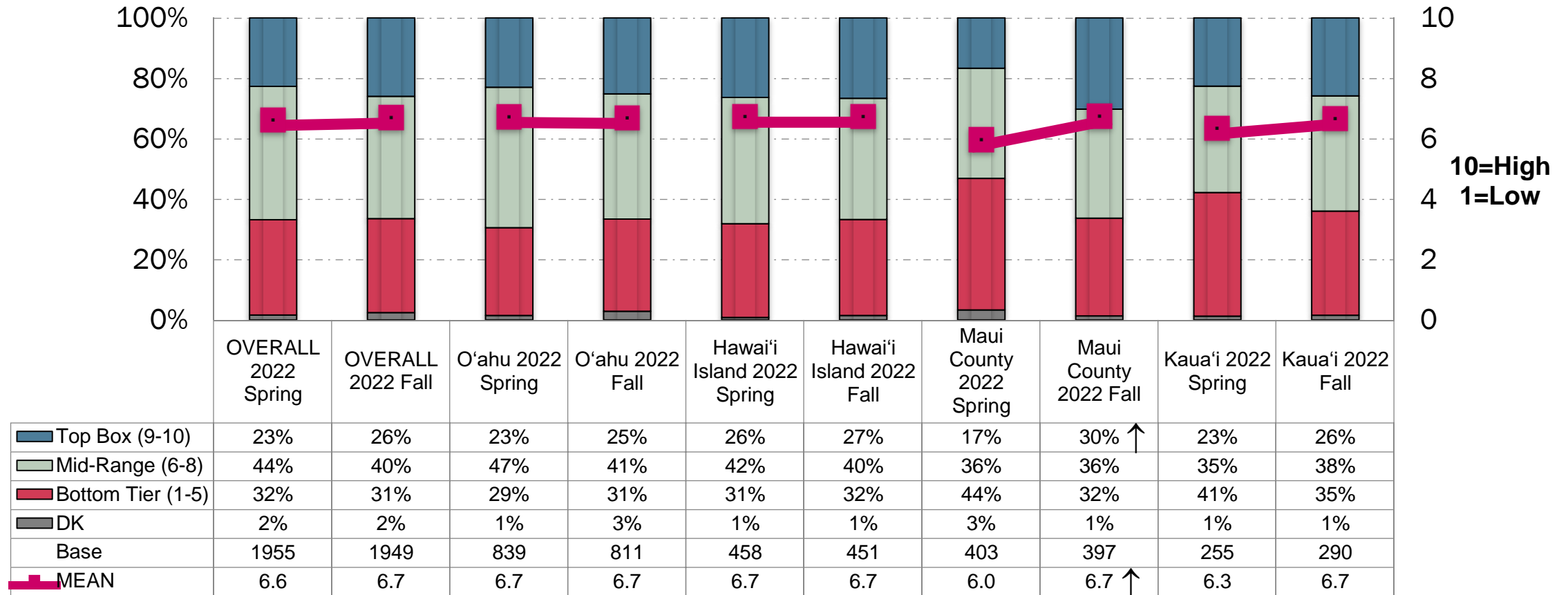
General Perceptions of the Visitor Industry

Perception of Tourism Industry in Hawai'i - Overall



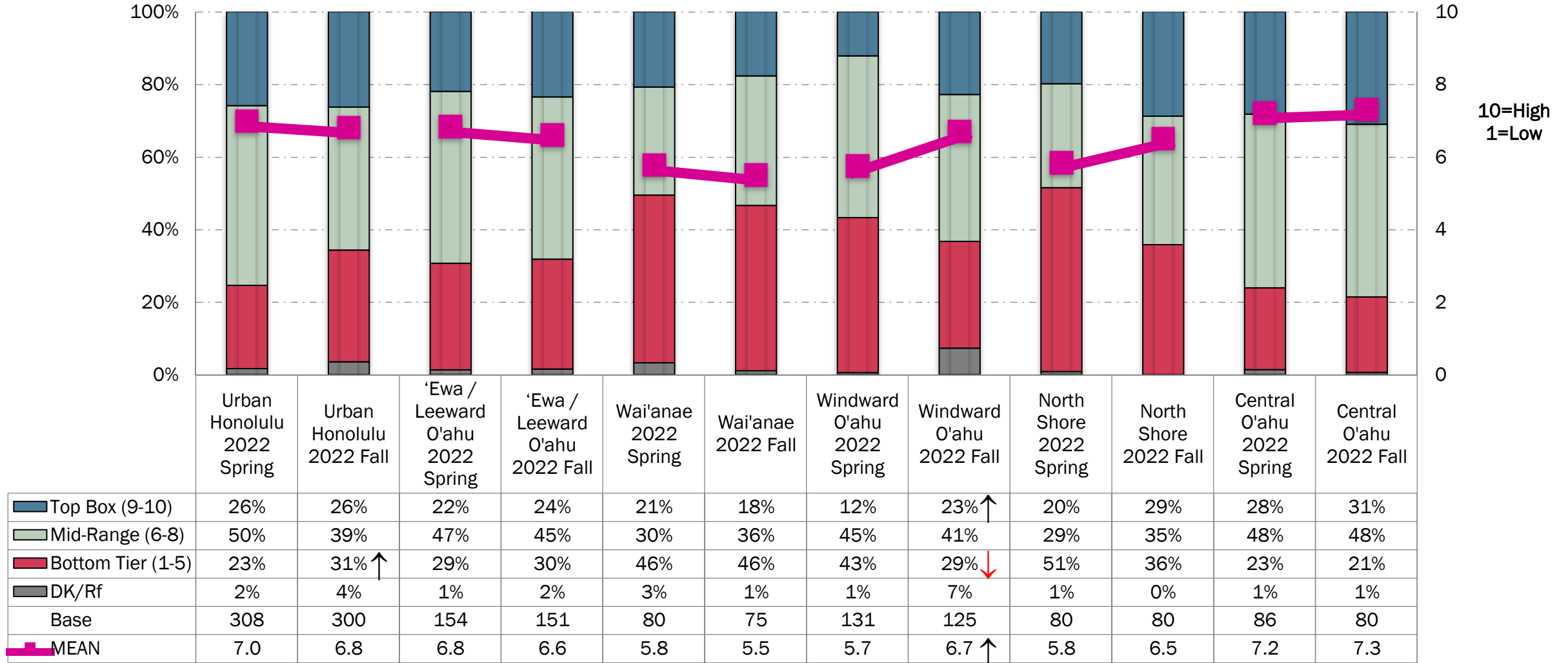
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

Perception of Tourism Industry in Hawai'i - *By County*



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

Perception of Tourism Industry in Hawai'i - *By Area (O'ahu)*



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

Perception of Tourism Industry in Hawai'i

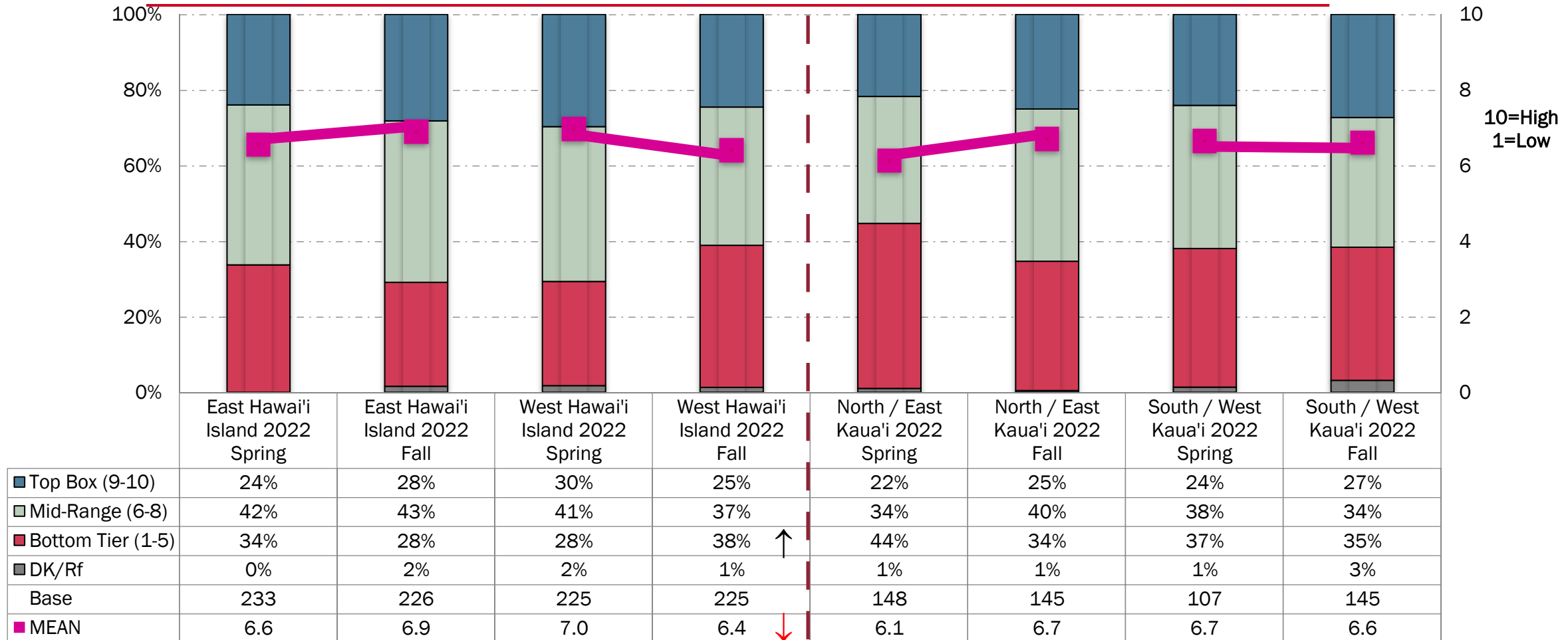
- By Area (Maui County)



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

Perception of Tourism Industry in Hawai'i

– *By Area (Hawai'i Island & Kaua'i)*



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

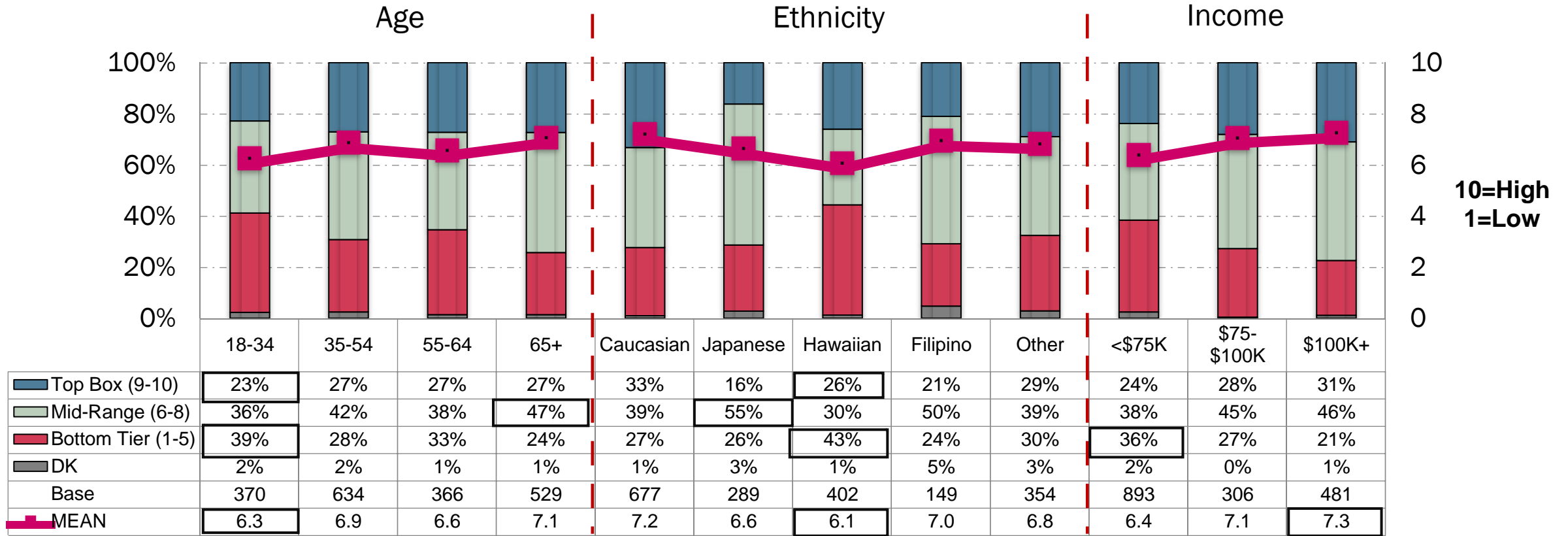
Perception of Tourism Industry in Hawai'i - Visitor Industry Household vs Non-Visitor Industry Household



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

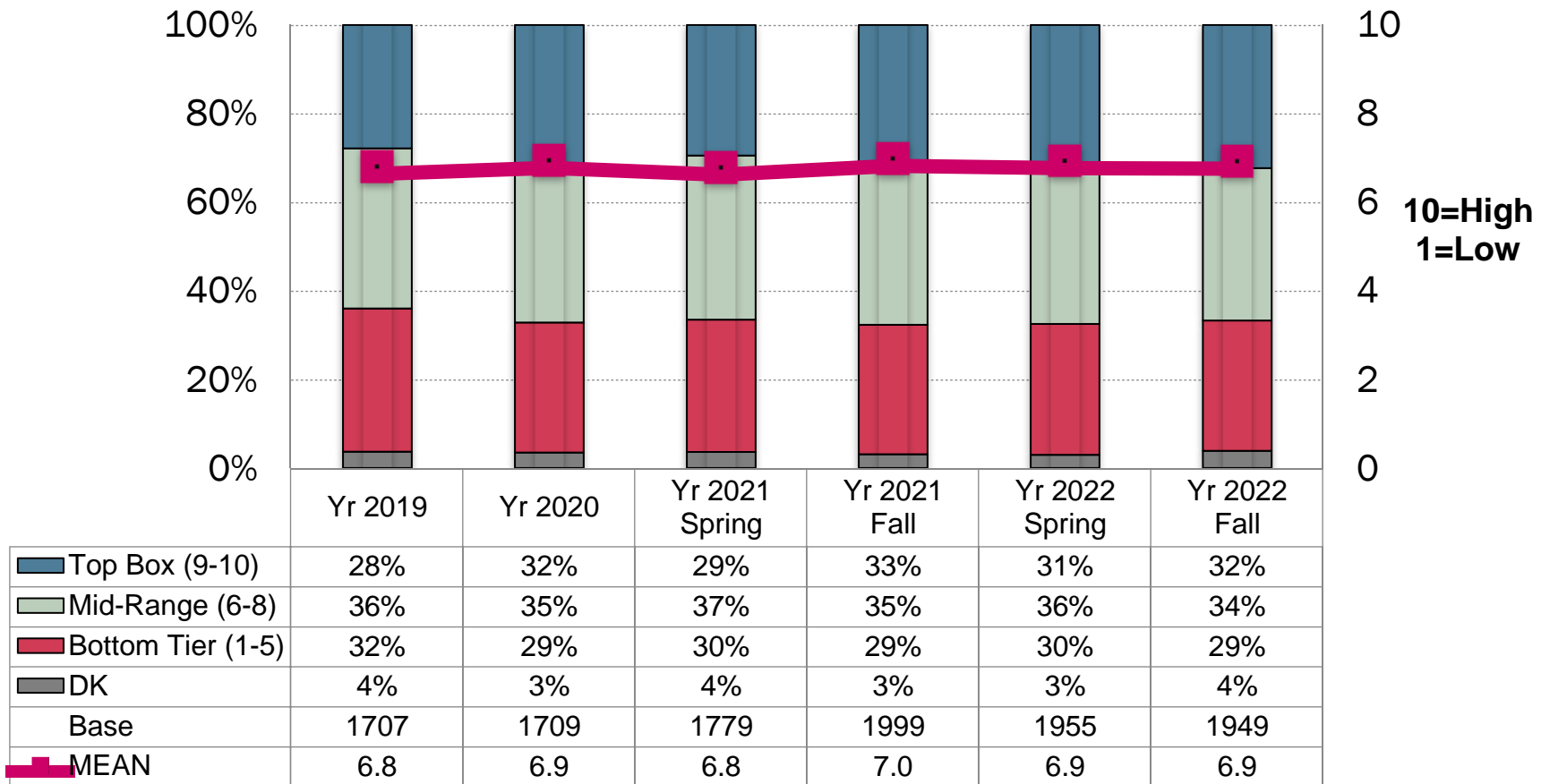
Perception of Tourism Industry in Hawai'i

- *By Demographics*



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of Tourism as an industry in Hawai'i.

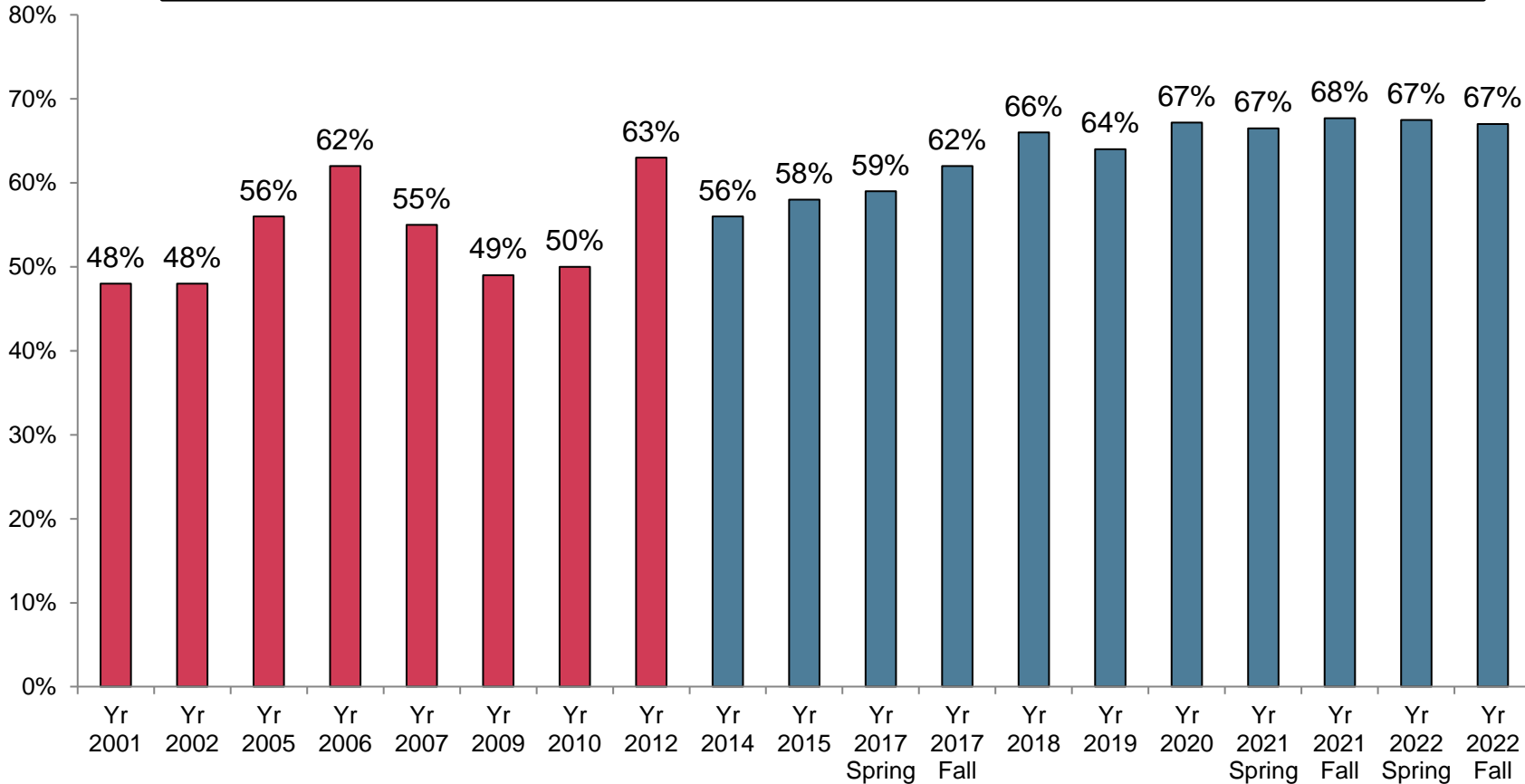
“This island is being run for tourists at the expense of local people” – Overall



Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” - Overall

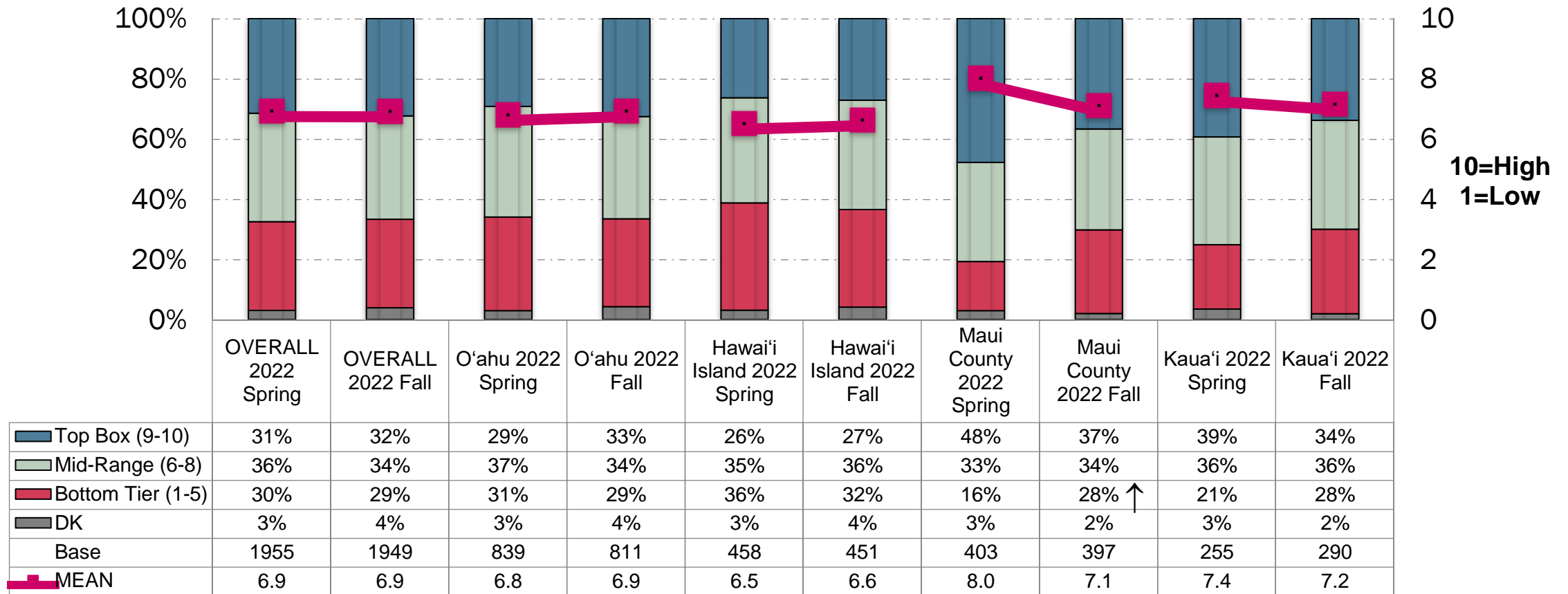
% strongly/ somewhat agree island is being run for tourists at expense of local people



In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” – *By County*



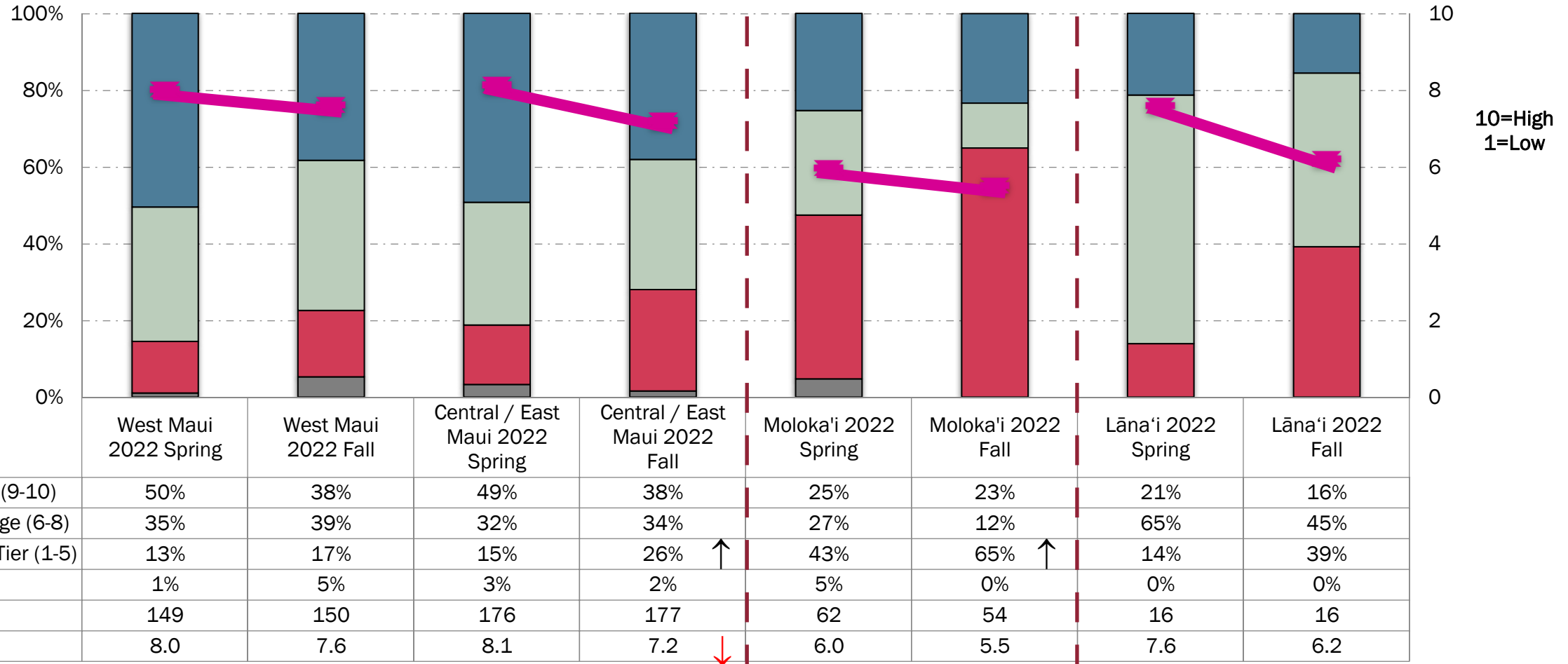
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” - *By Area (O’ahu)*



Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” – By Area (Maui County)



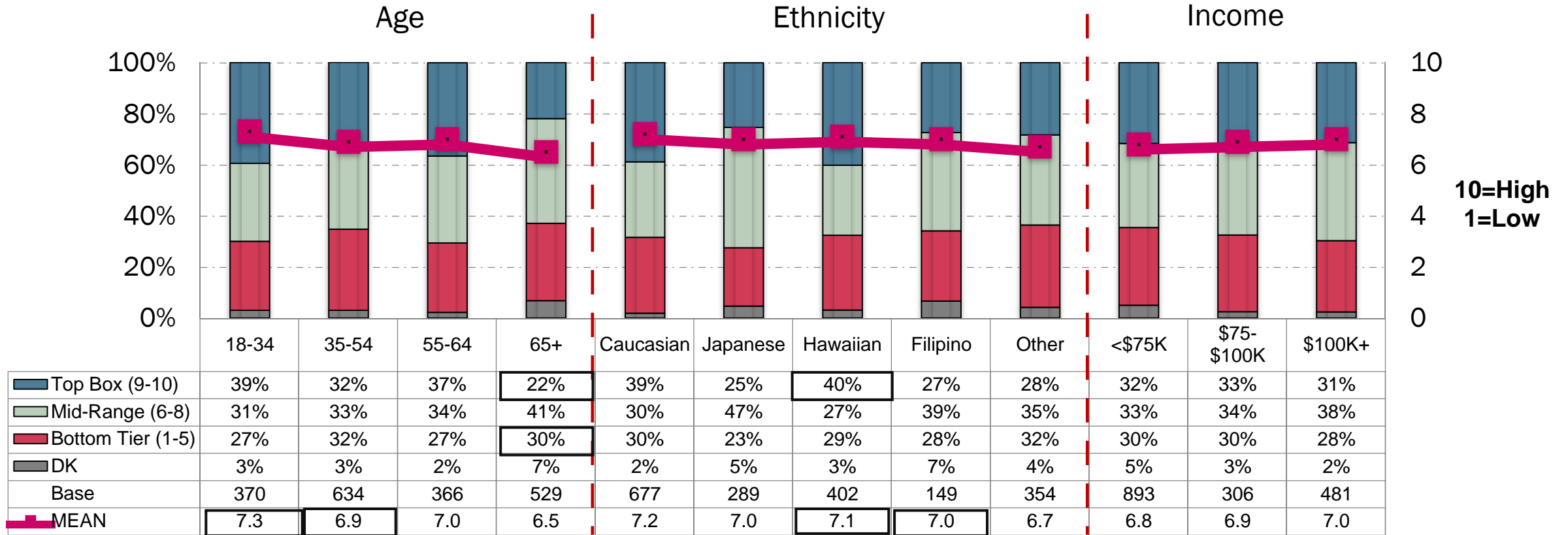
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

“This island is being run for tourists at the expense of local people” – *By Area (Hawai‘i Island & Kaua‘i)*



Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

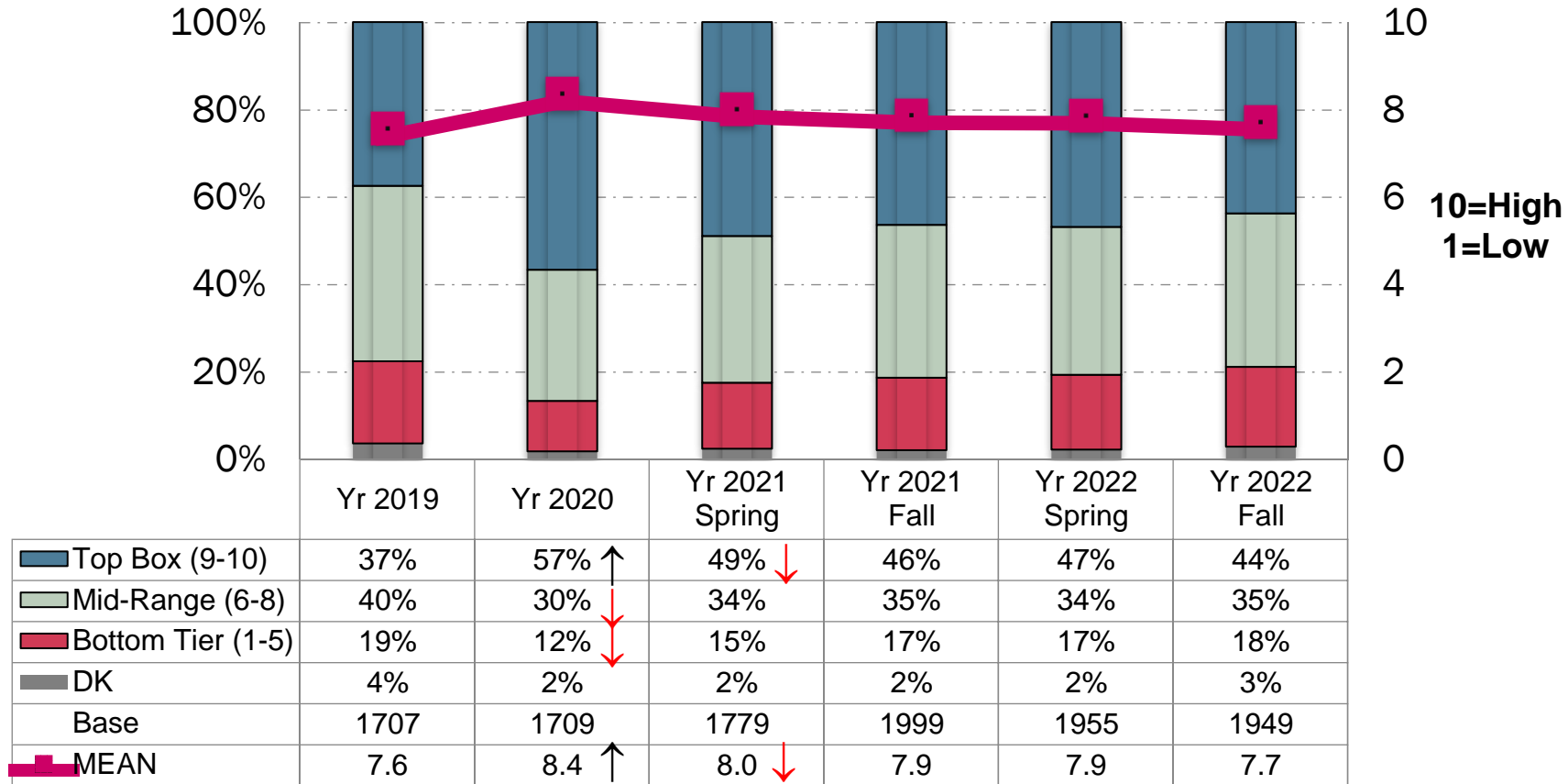
“This island is being run for tourists at the expense of local people” – *By Demographics*



Q4.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

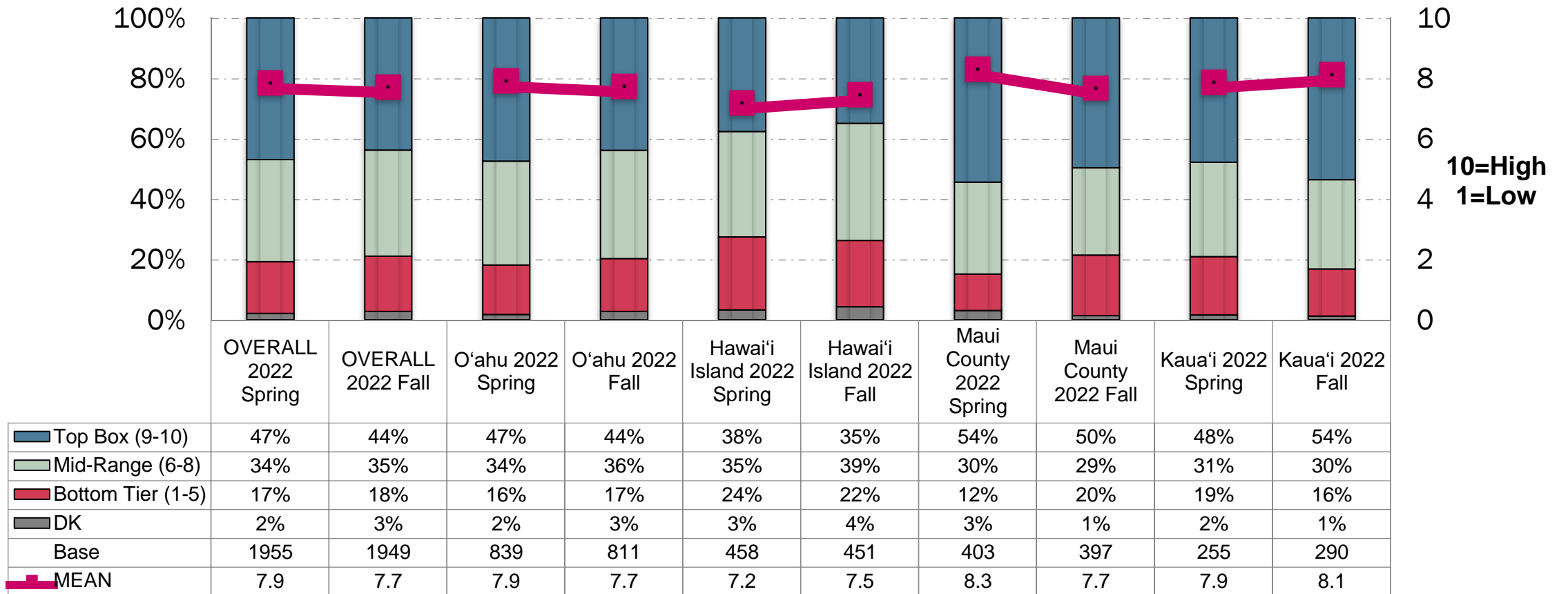
“My Island’s economy is too dependent on tourism”

– Overall



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

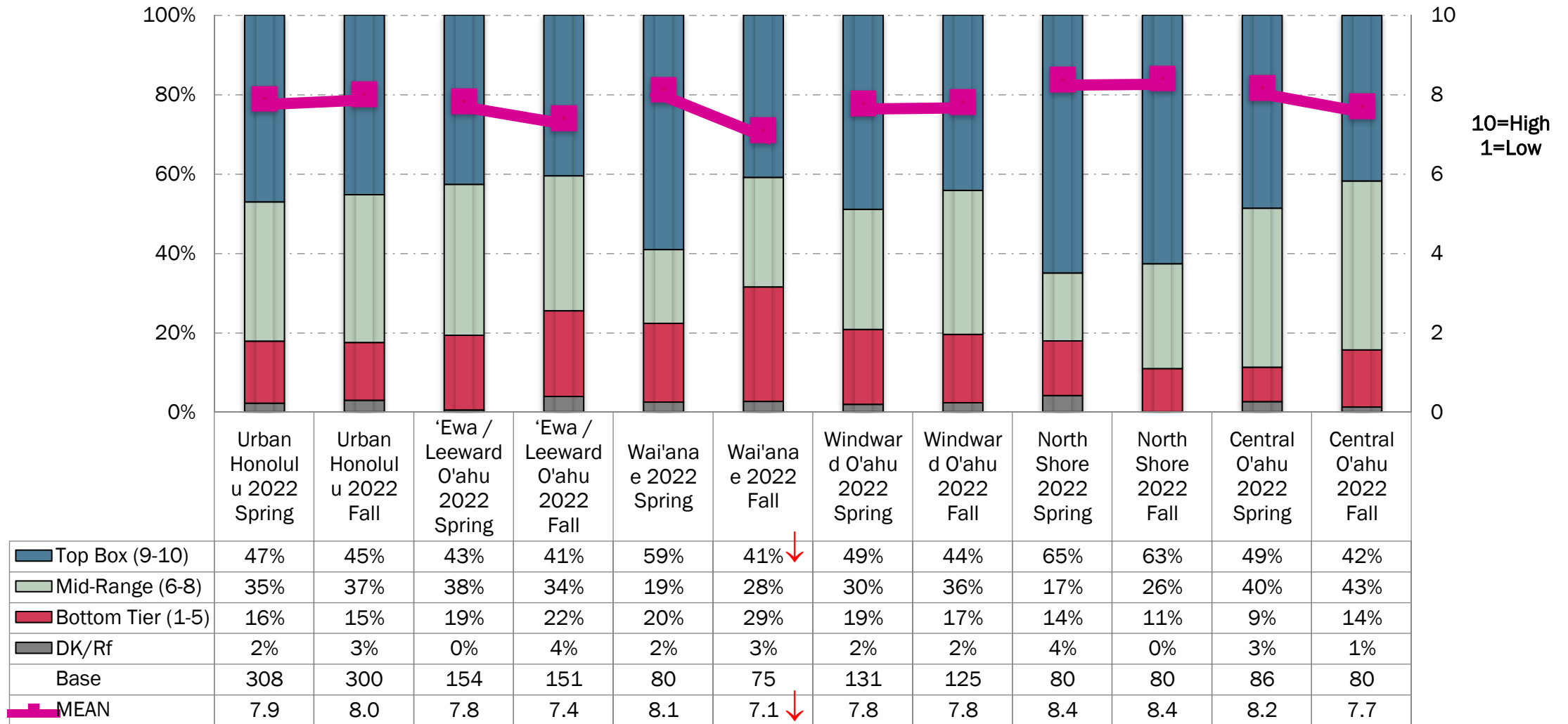
“My Island’s economy is too dependent on tourism” – *By County*



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism”

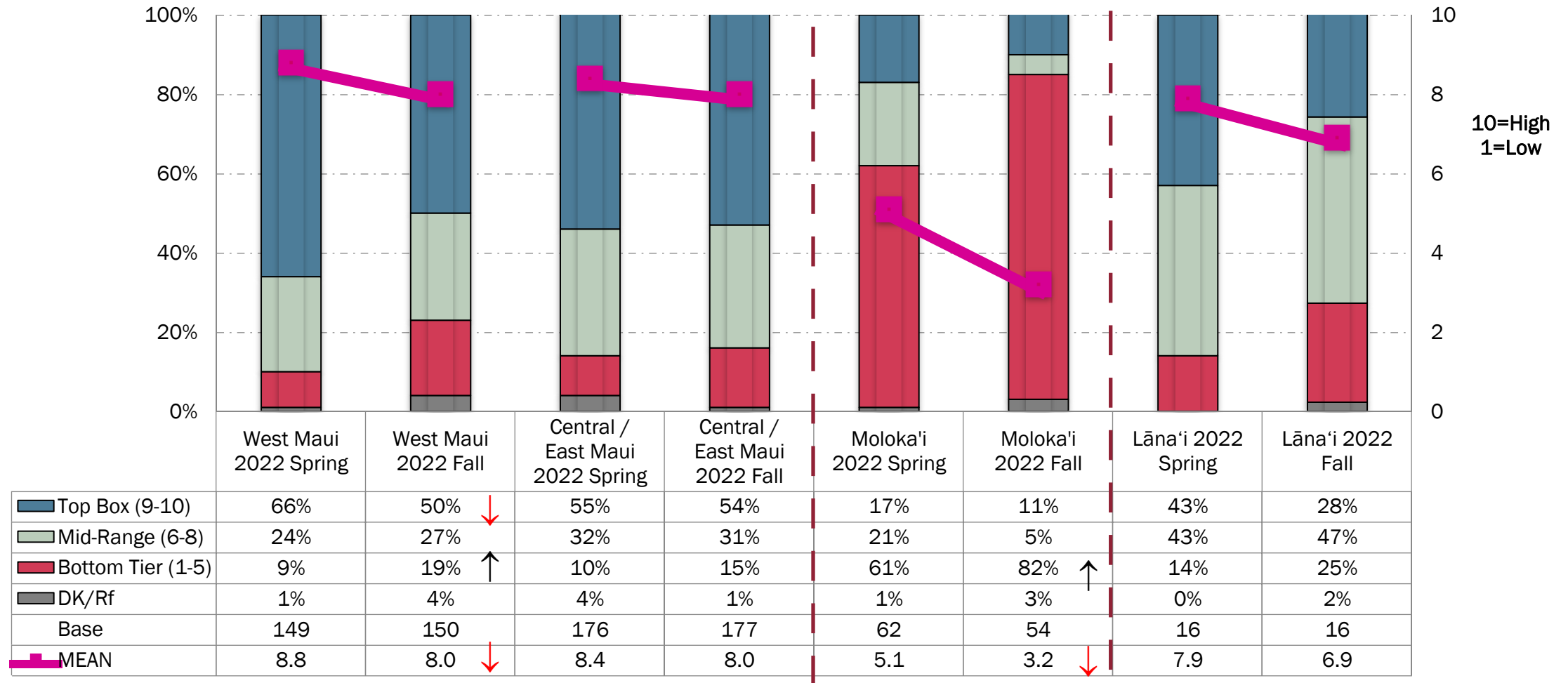
- *By Area (O’ahu)*



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism”

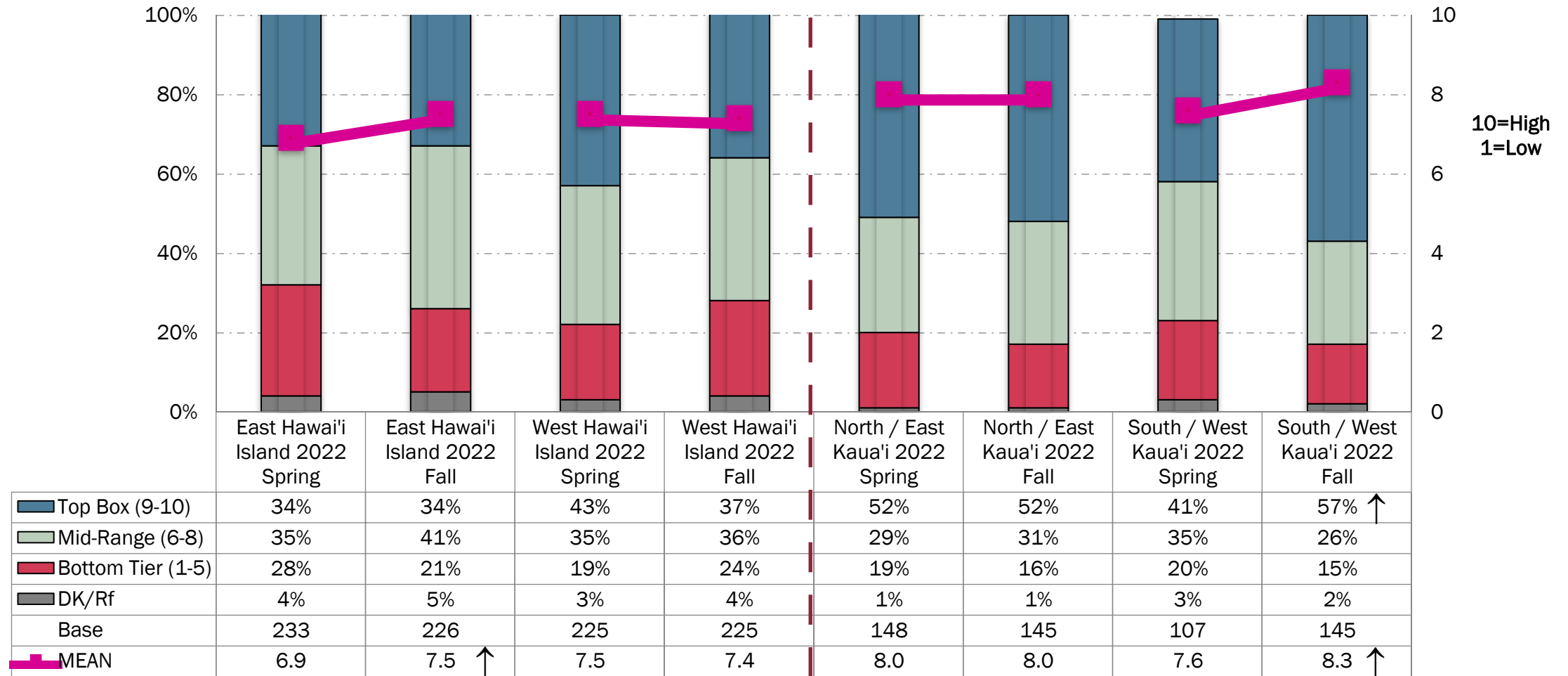
- *By Area (Maui County)*



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism”

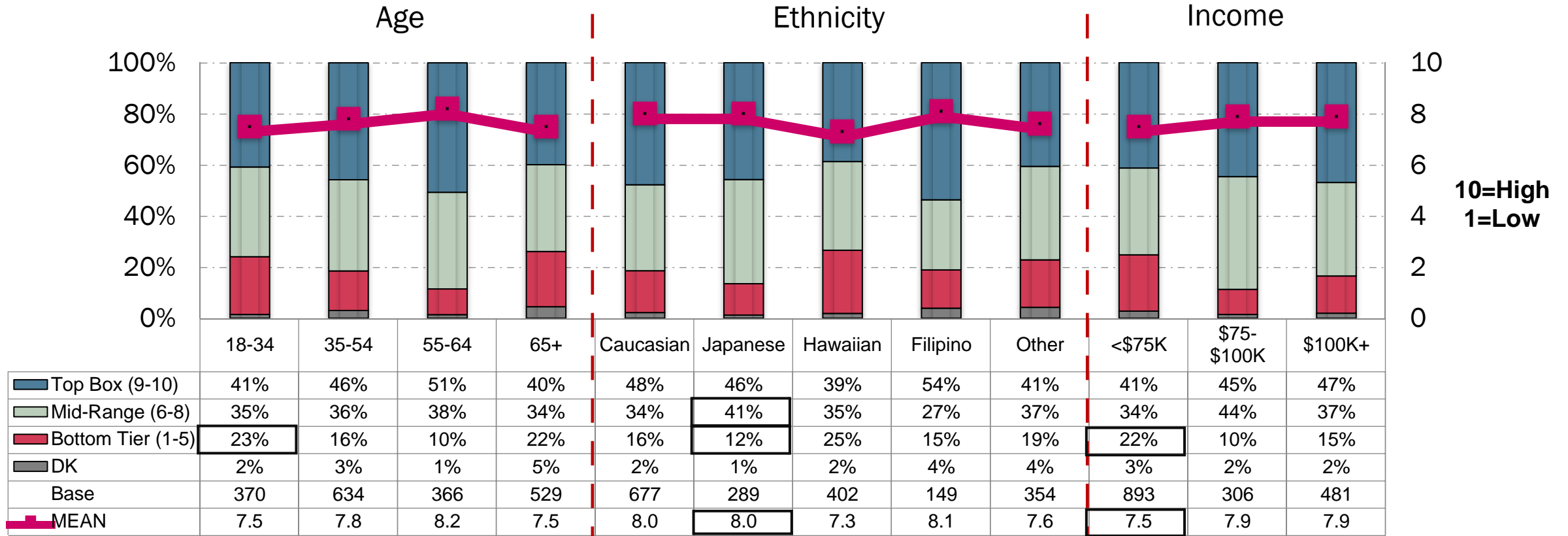
- *By Area (Hawai‘i Island & Kaua‘i)*



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

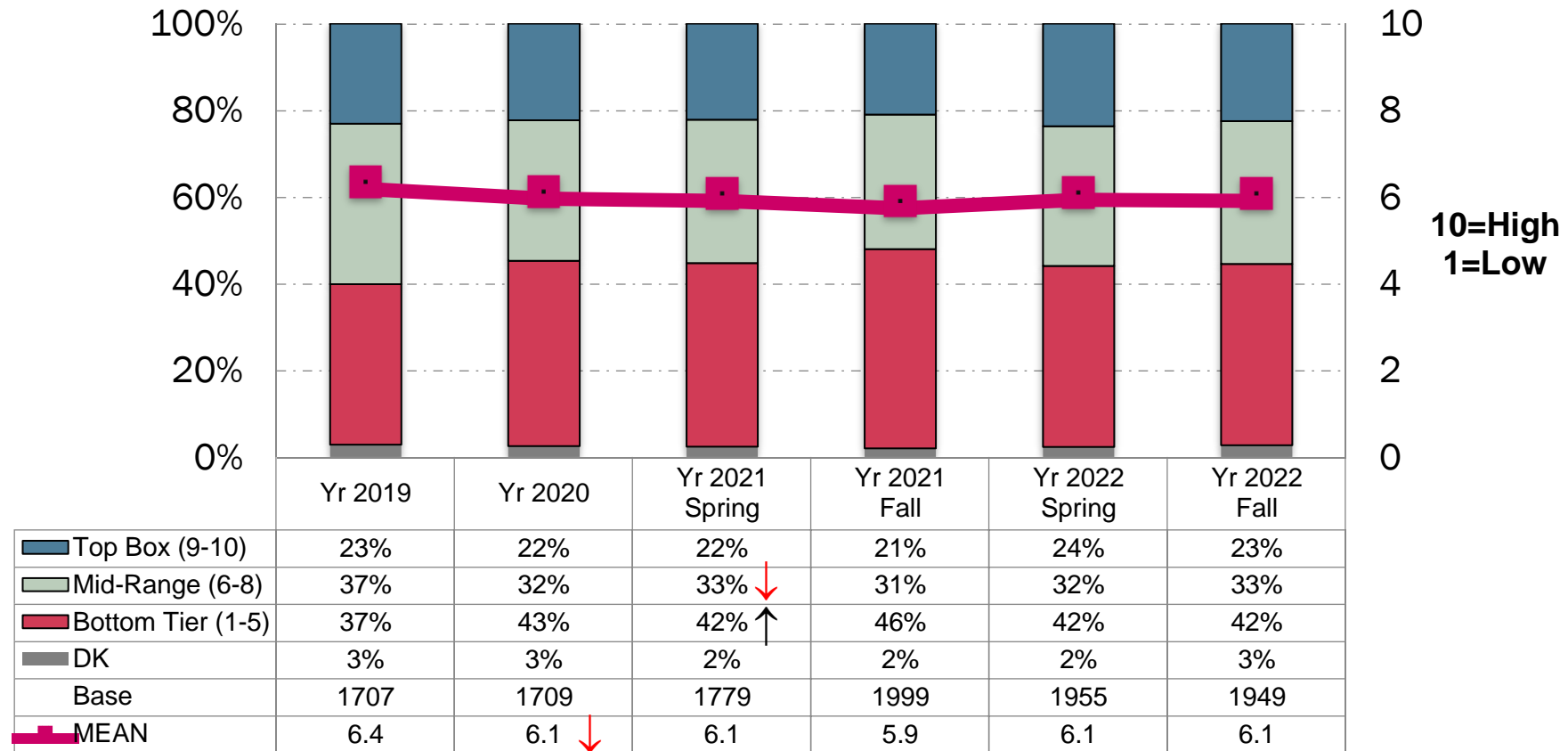
“My Island’s economy is too dependent on tourism”

– *By Demographics*



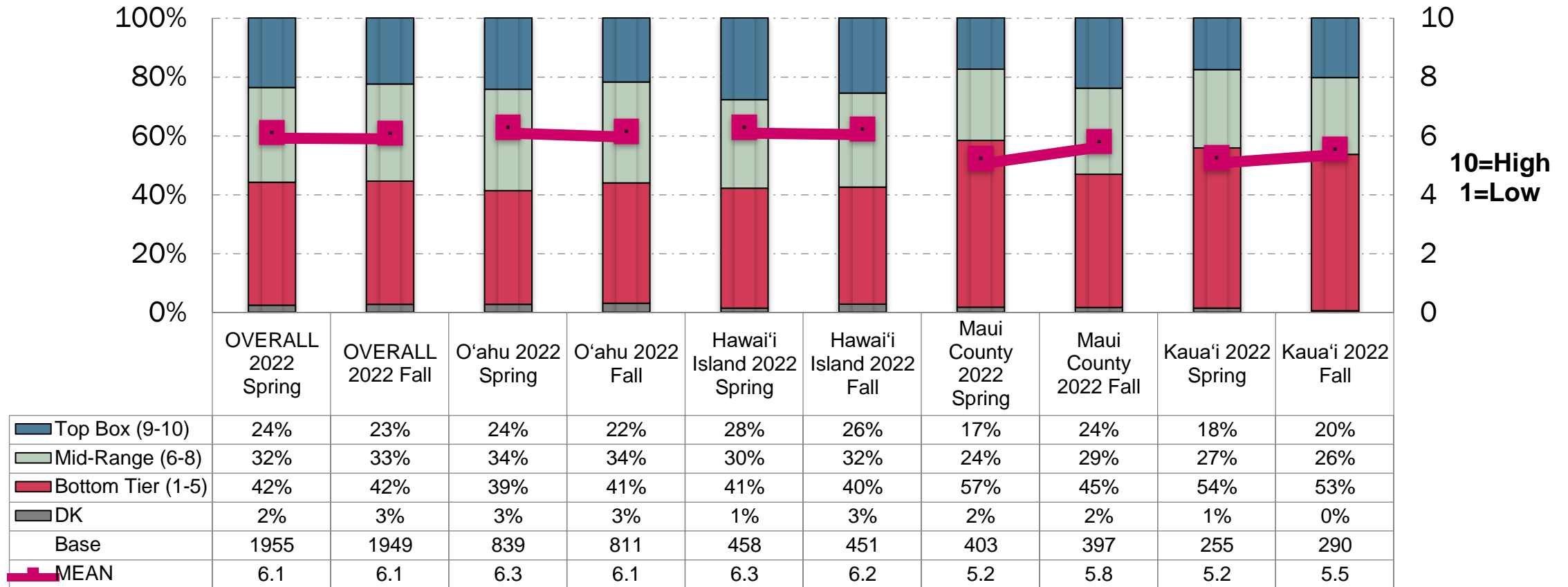
Q4.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism should be actively encouraged on my island - Overall



Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

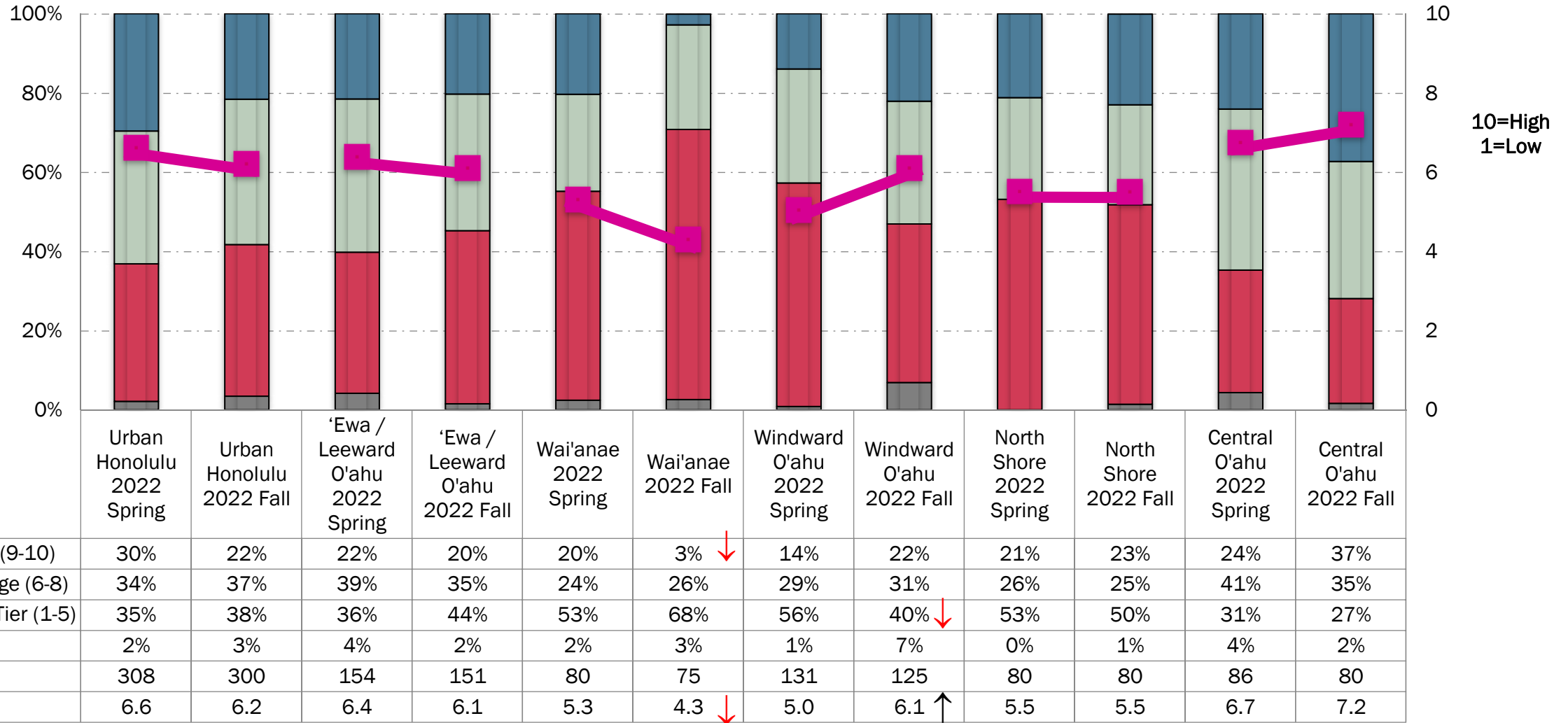
“Tourism should be actively encouraged on my island” – *By County*



Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism should be actively encouraged on my island”

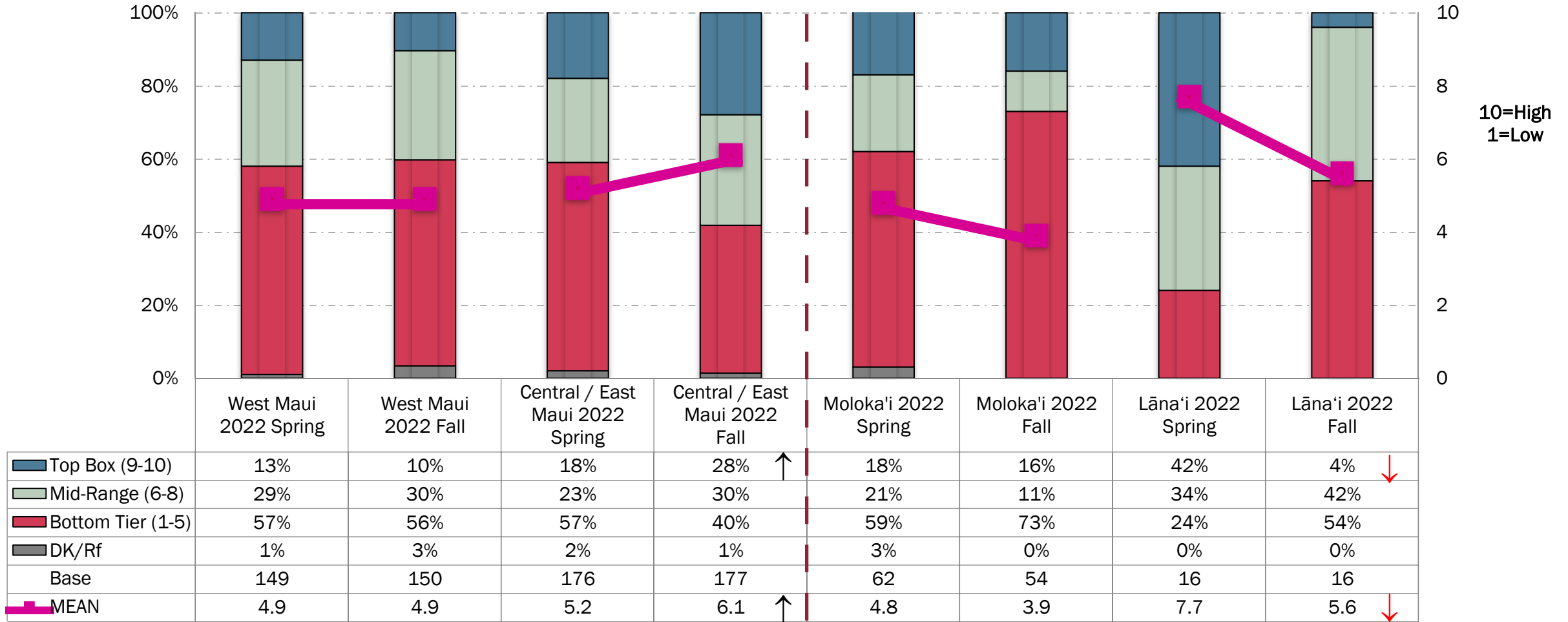
– *By Area (O‘ahu)*



Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism should be actively encouraged on my island”

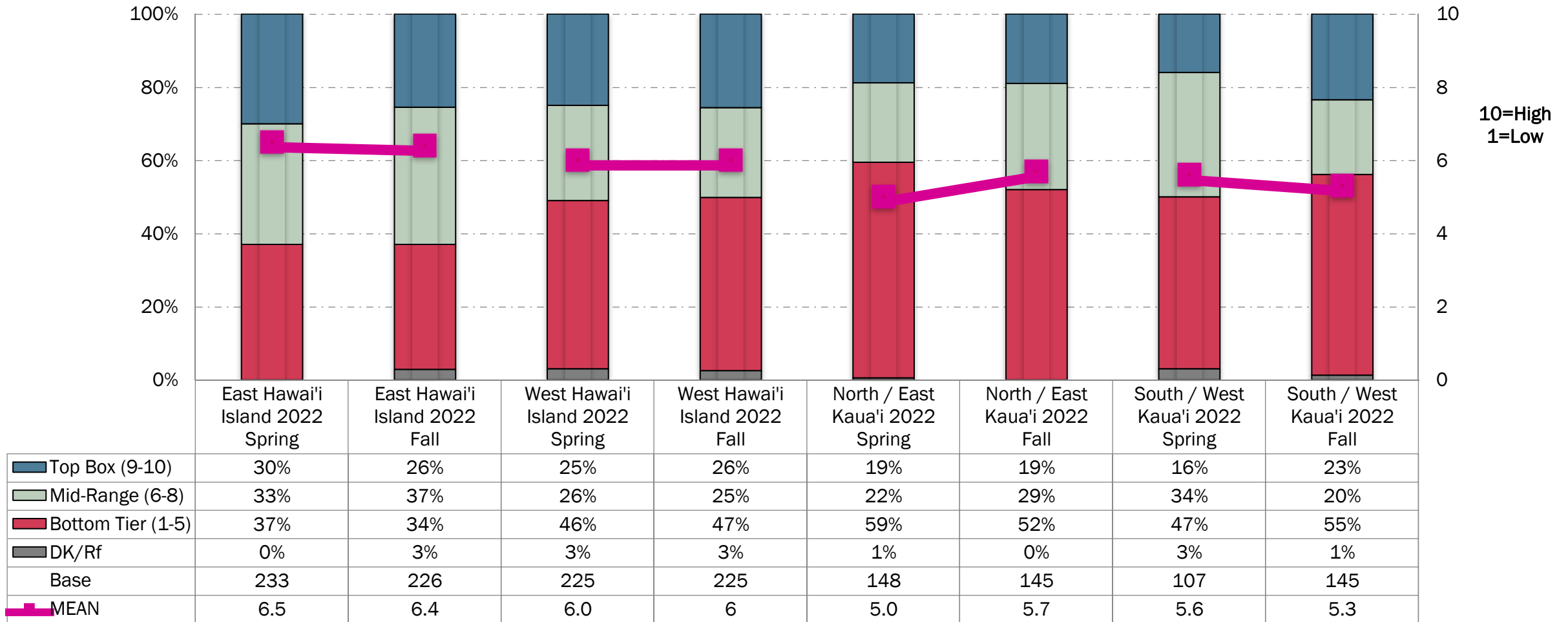
– *By Area (Maui County)*



Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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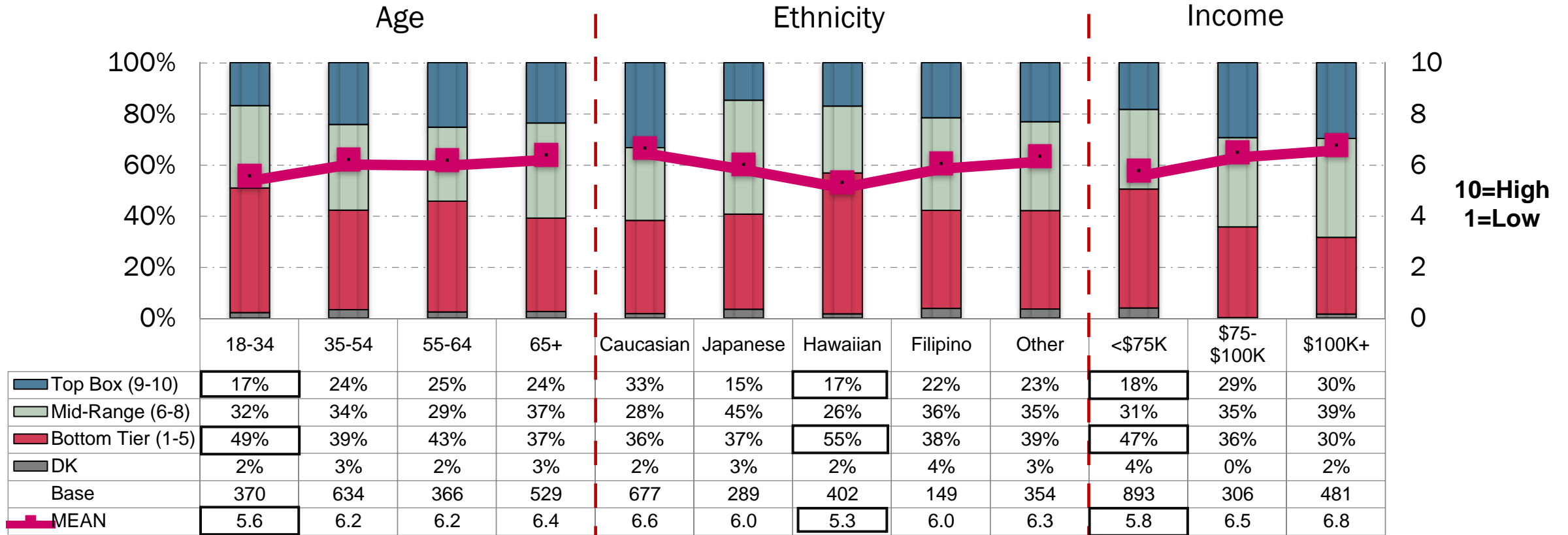
– *By Area (Hawai'i Island & Kaua'i)*



Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

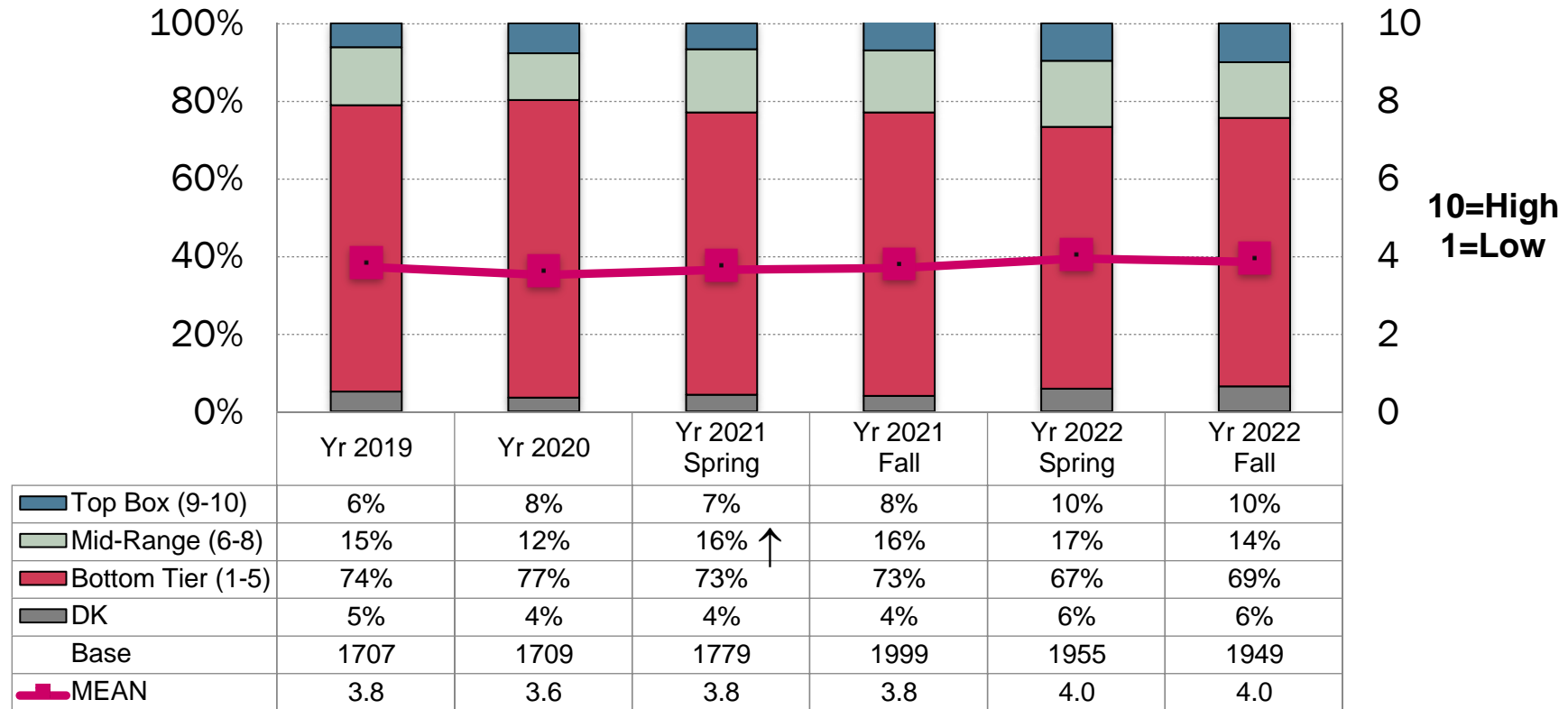
“Tourism should be actively encouraged on my island”

– *By Demographics*



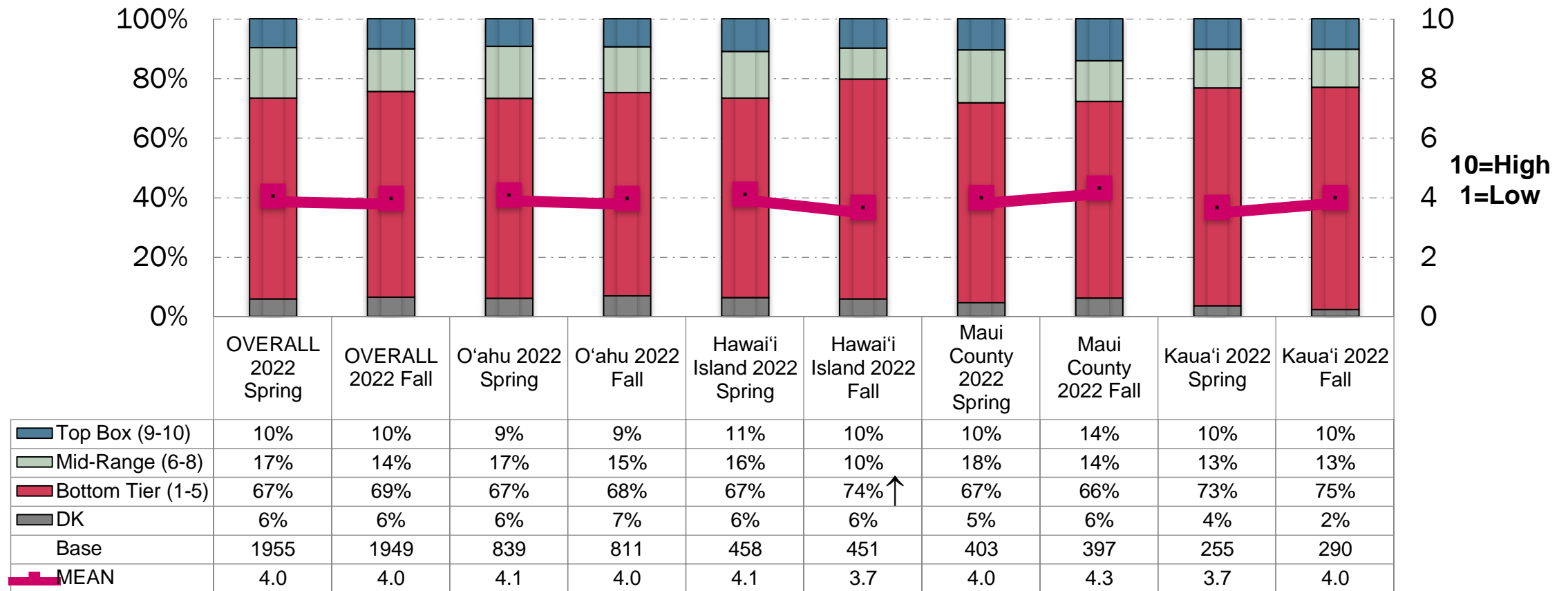
Q4.8. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like I have a voice in my island’s tourism development decisions” - *Overall*



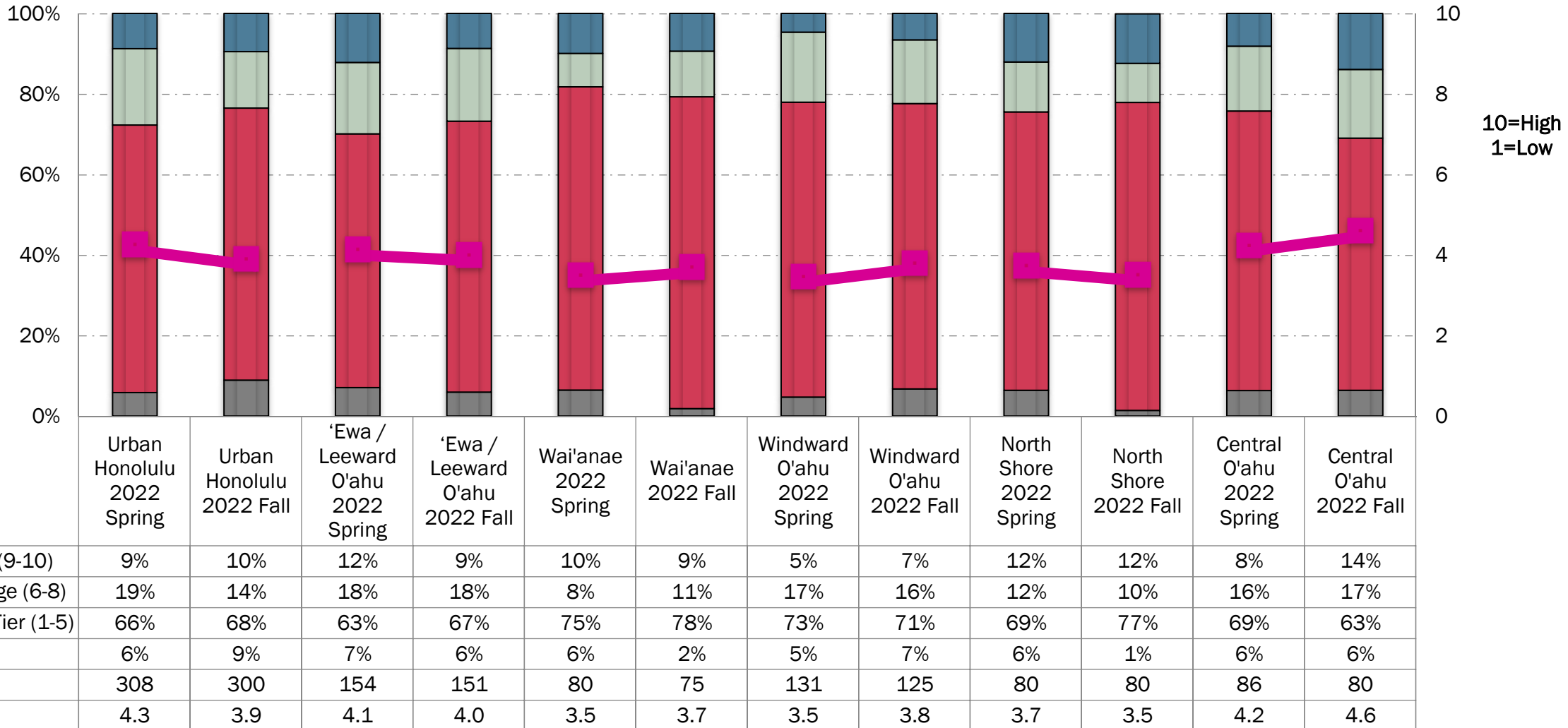
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” – *By County*



Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” – *By Area (O’ahu)*



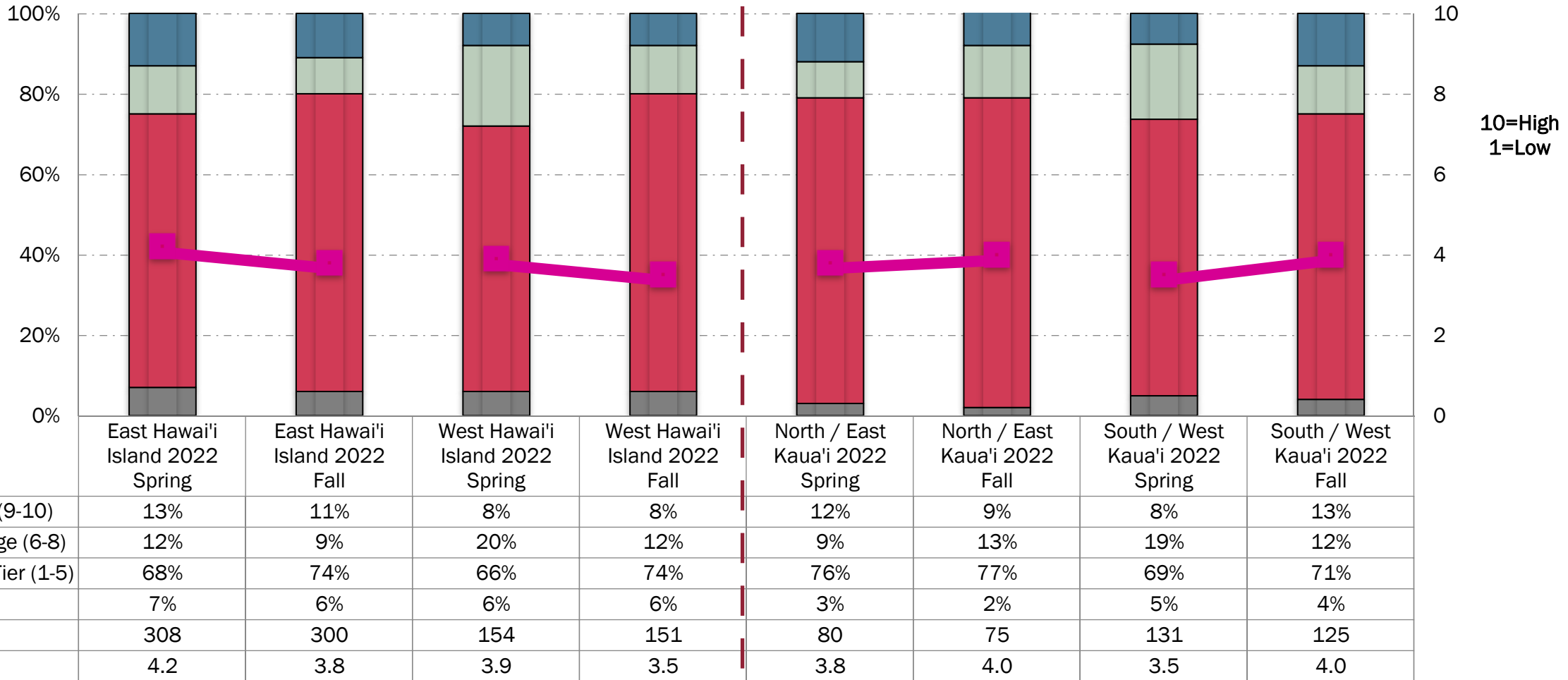
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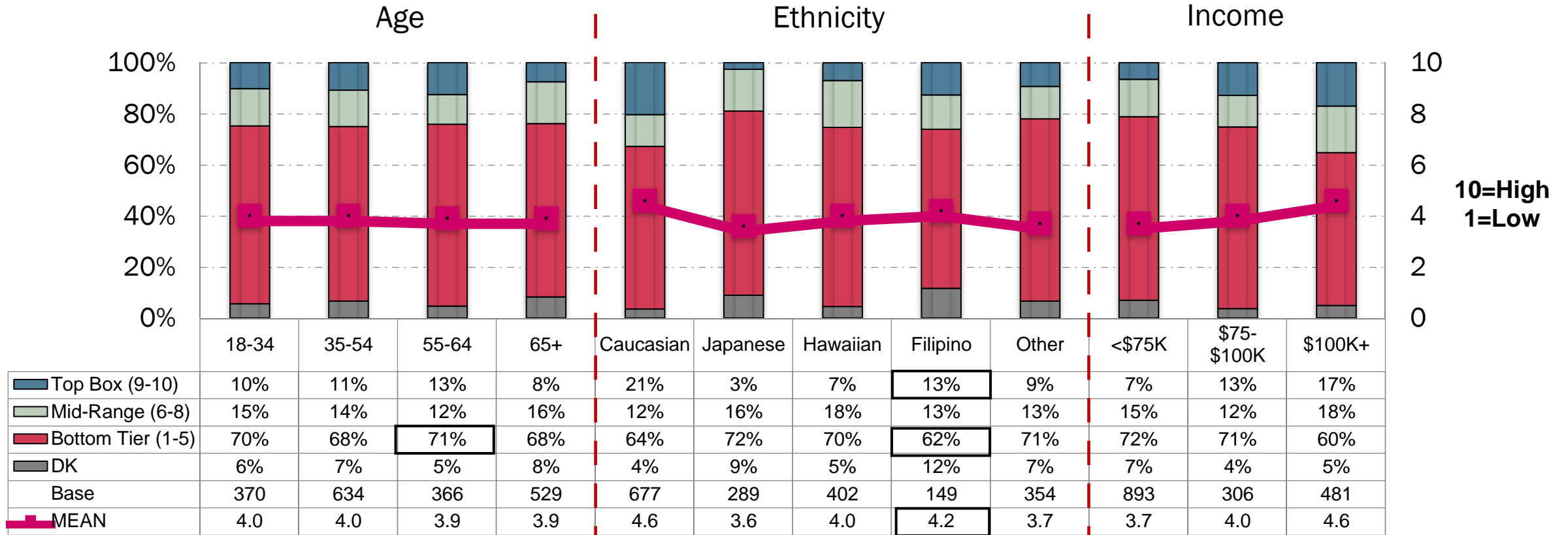
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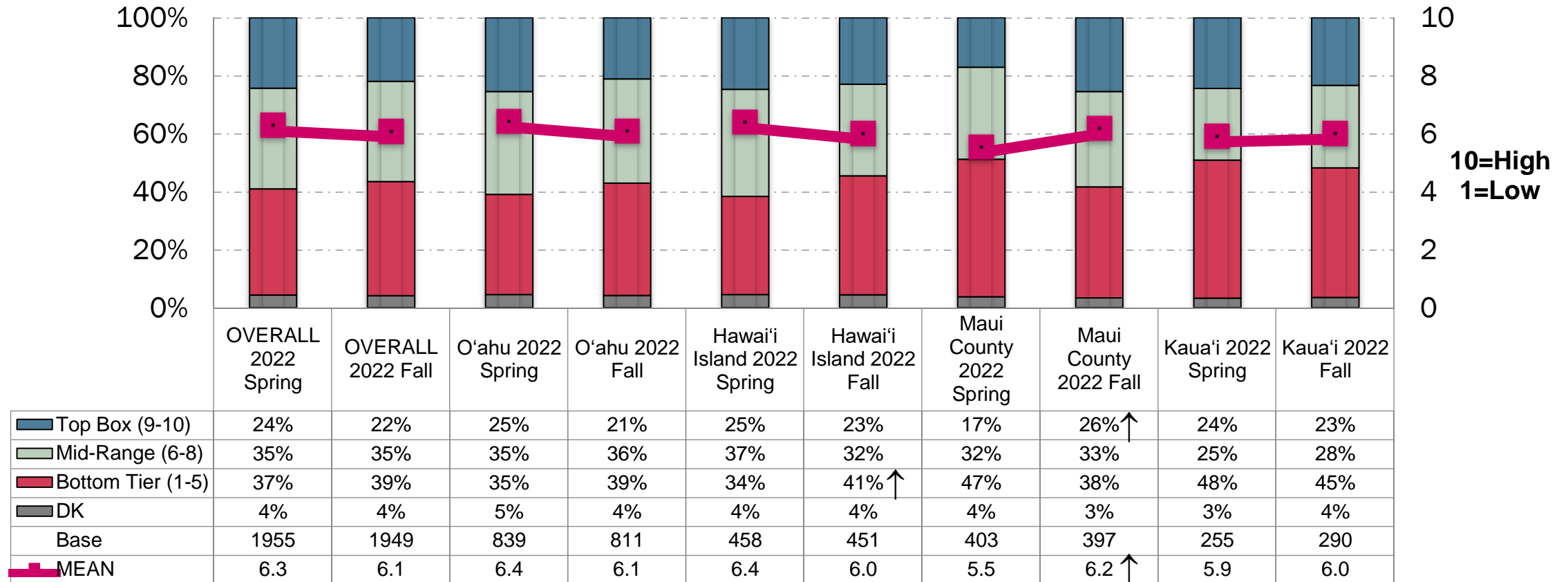
“I feel like I have a voice in my island’s tourism development decisions”

– *By Demographics*



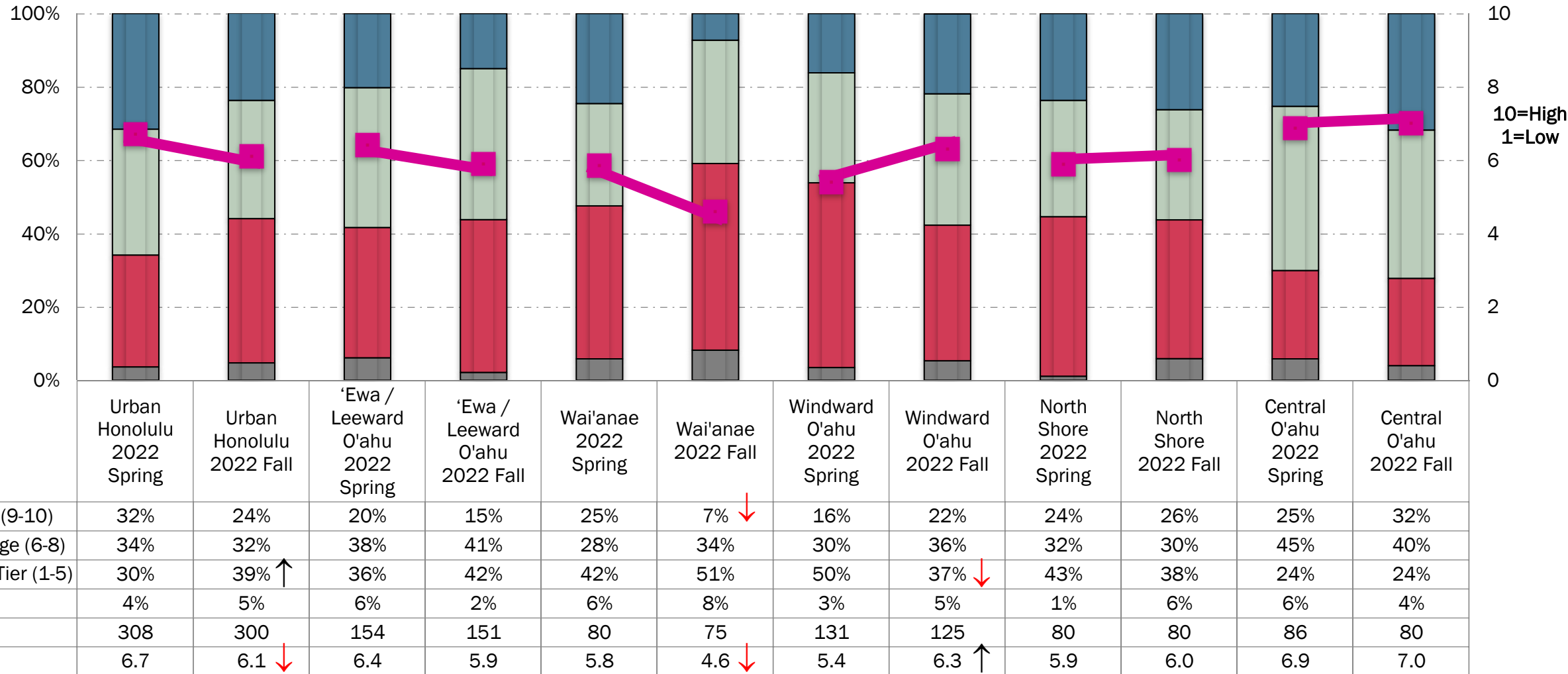
Q4.11. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism supports other industries important to residents like agriculture” – *By County*



Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

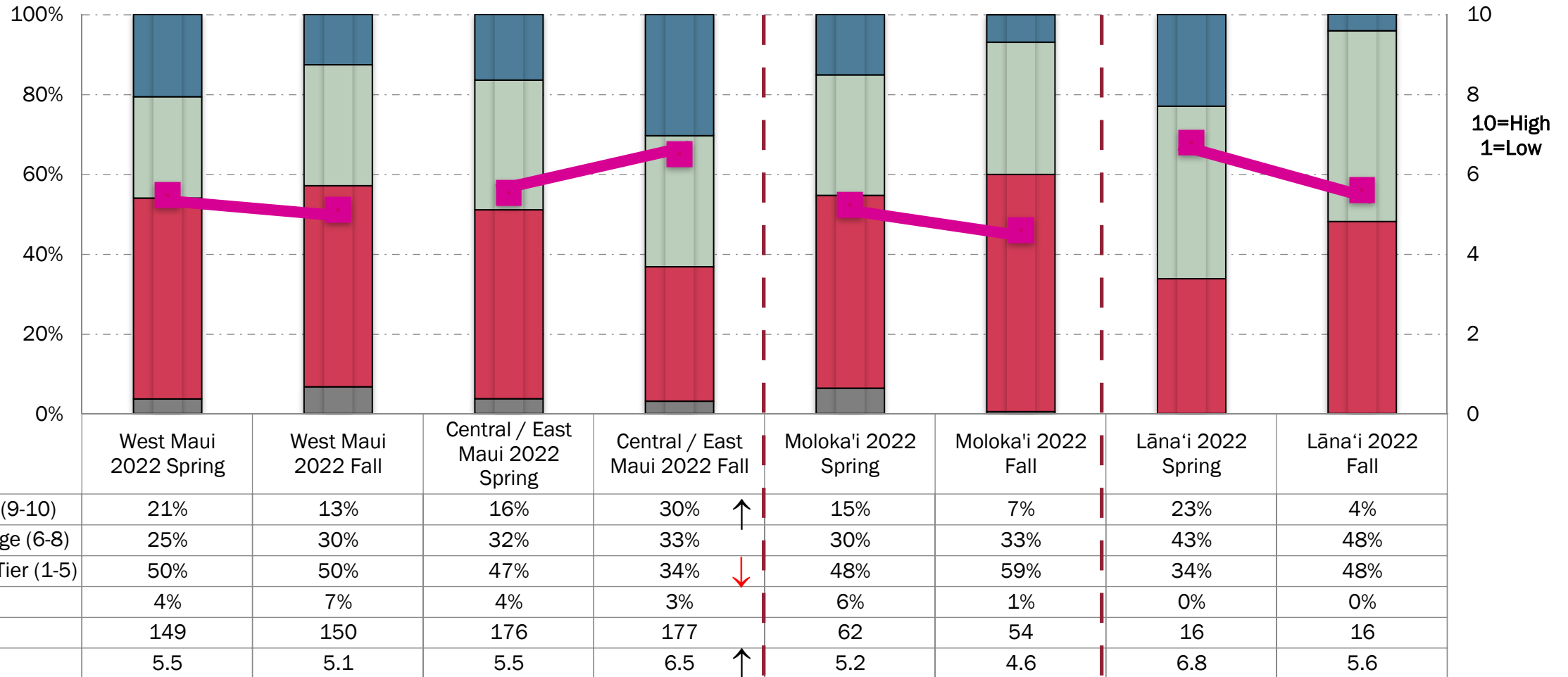
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*Note: Changed in Spring 2022 fielding from “Tourism supports other industries like agriculture.”

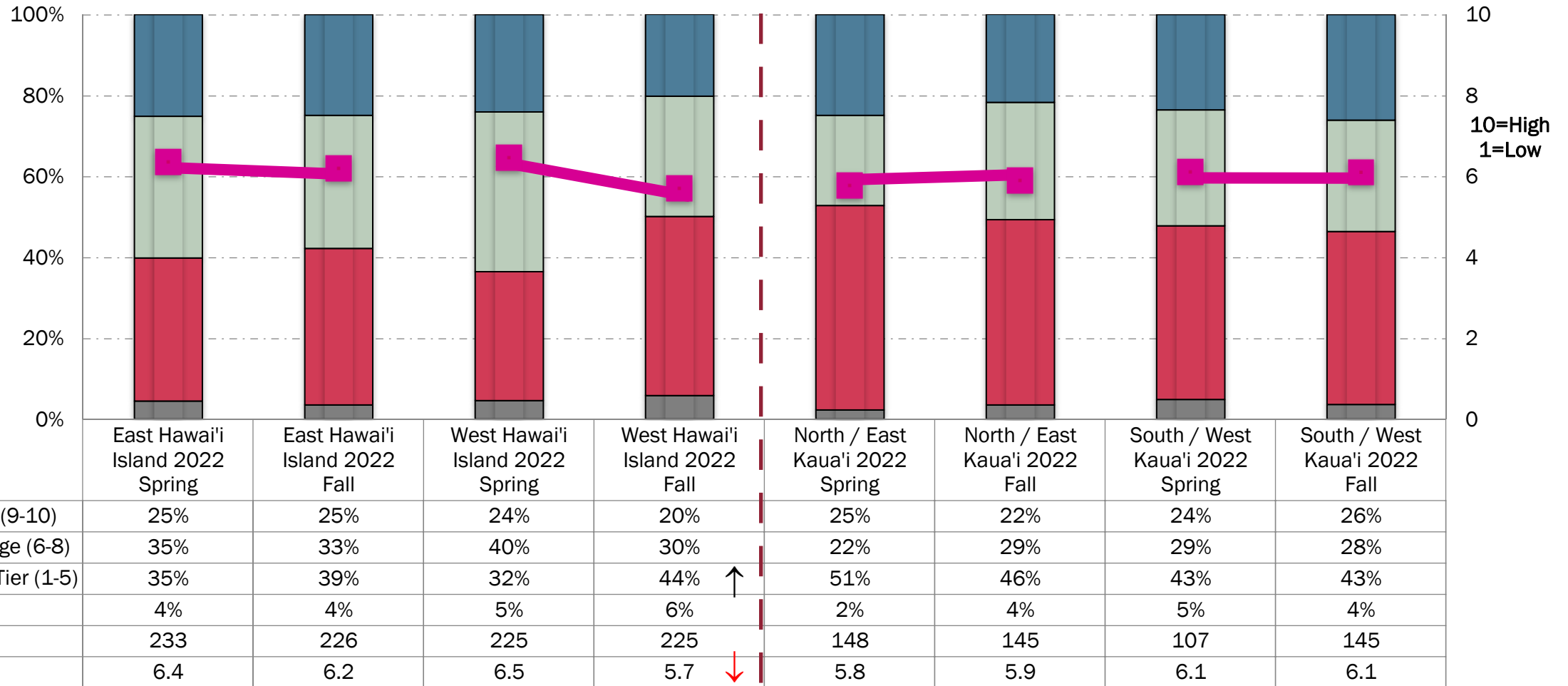
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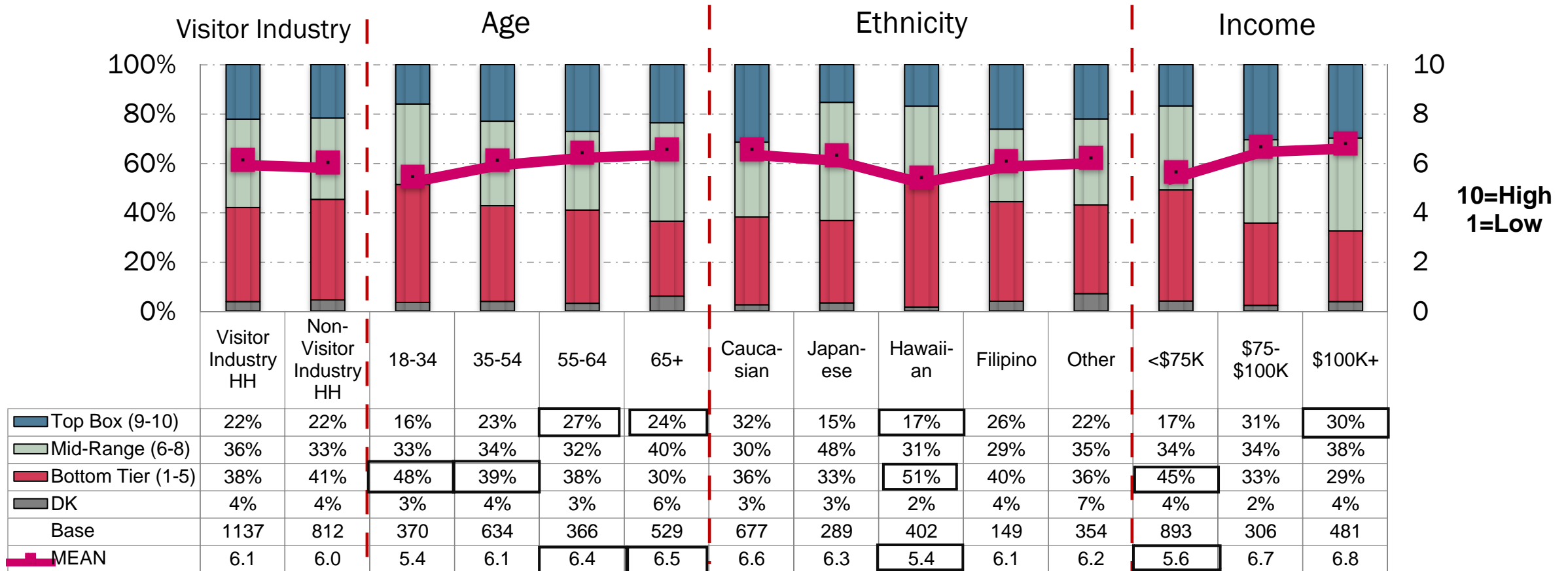
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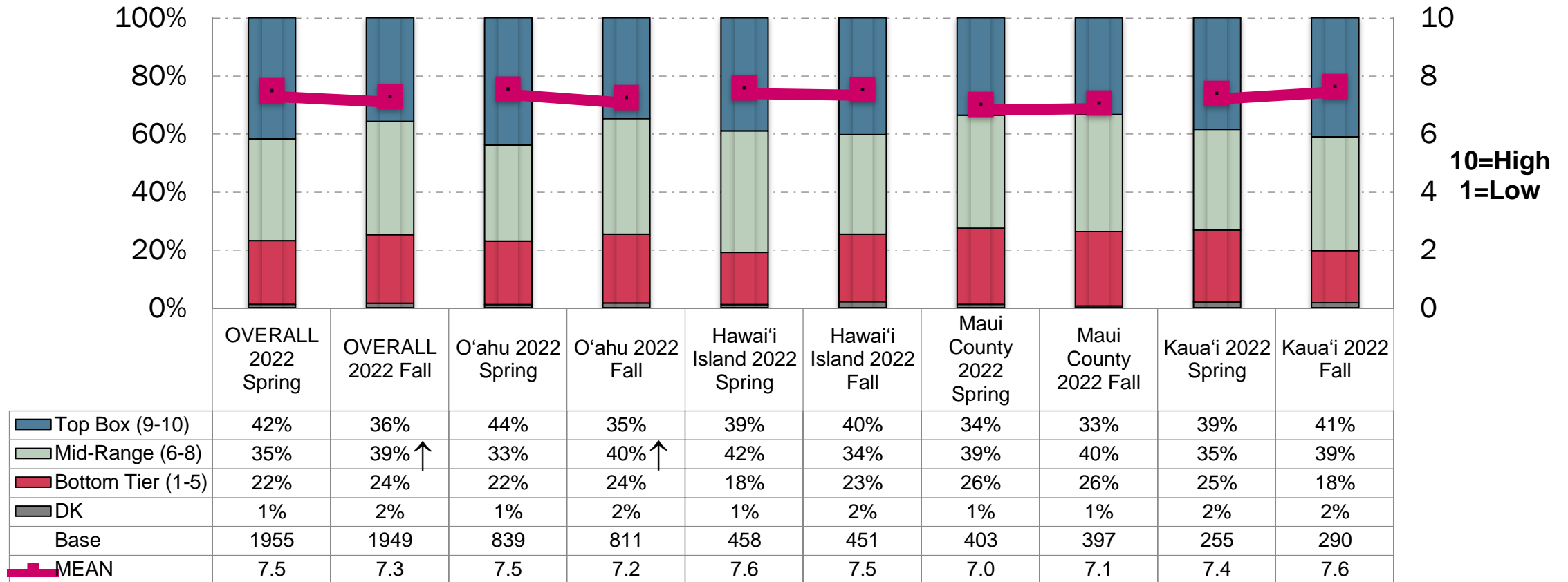
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“Tourism supports our local businesses like retail, dining, etc.” – *By County*



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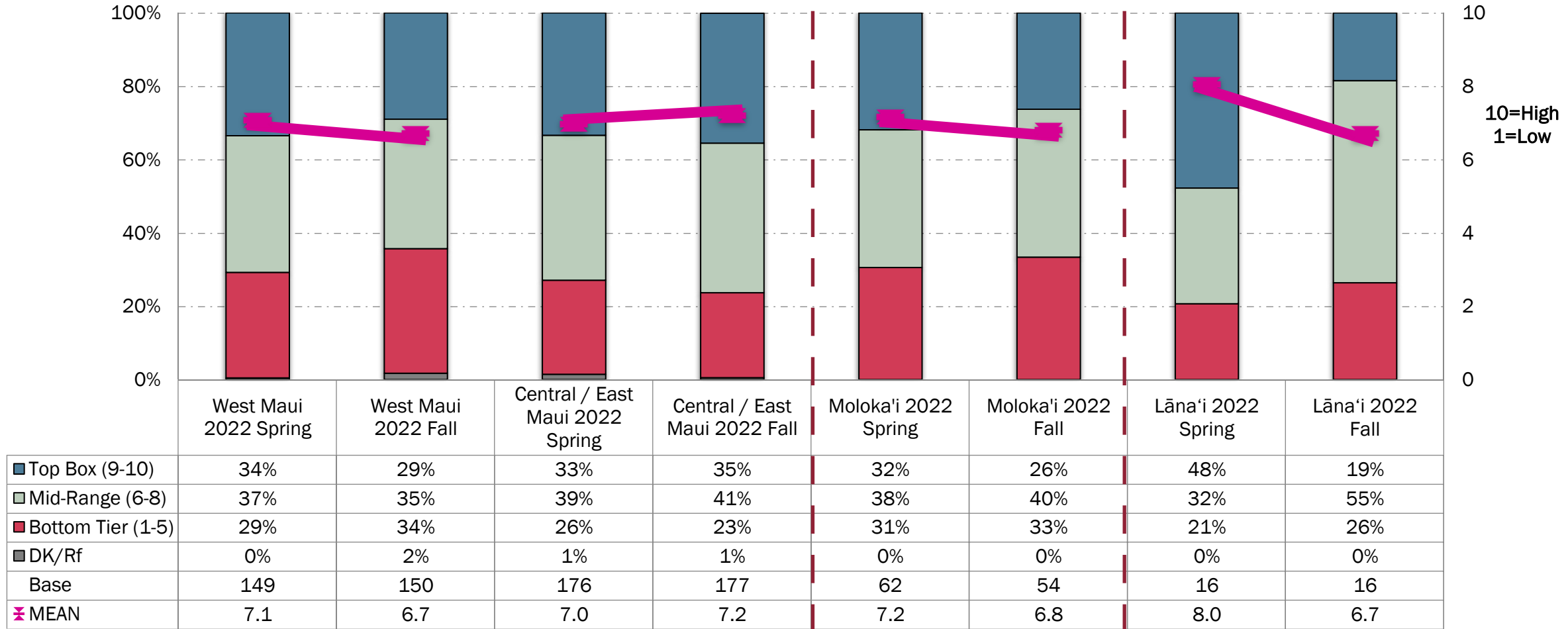
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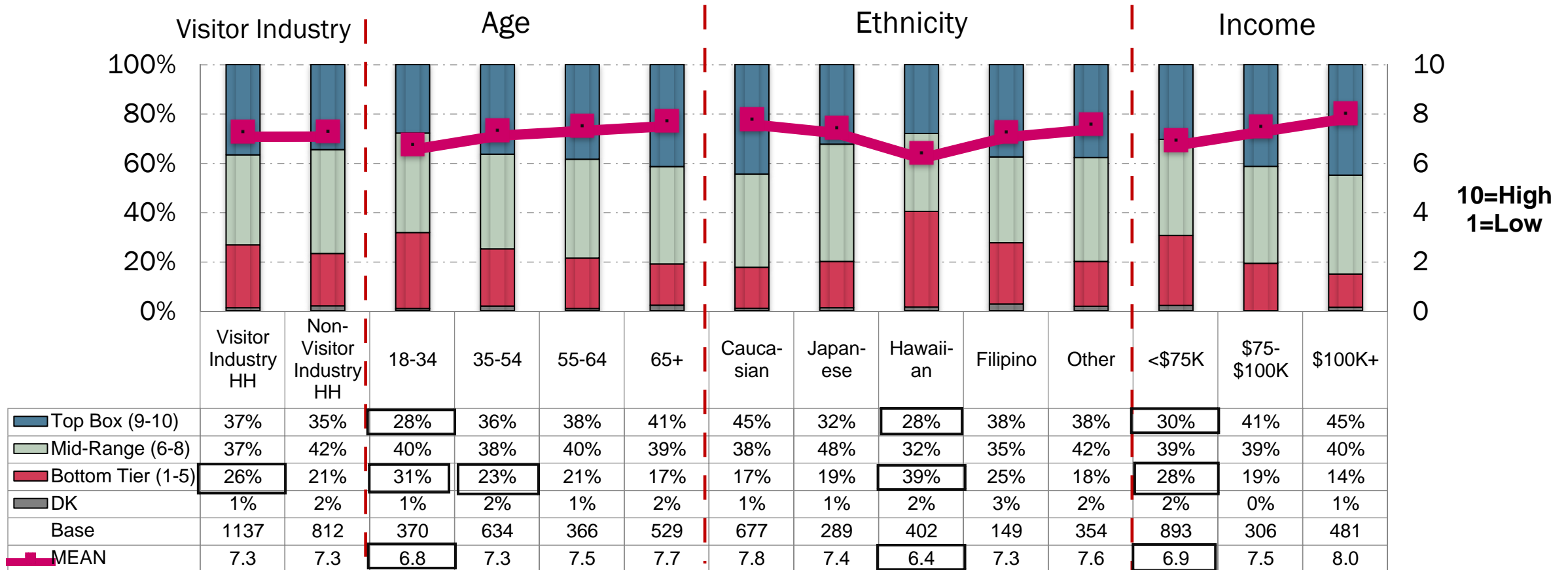
- *By Area (Hawai'i Island & Kaua'i)*



Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

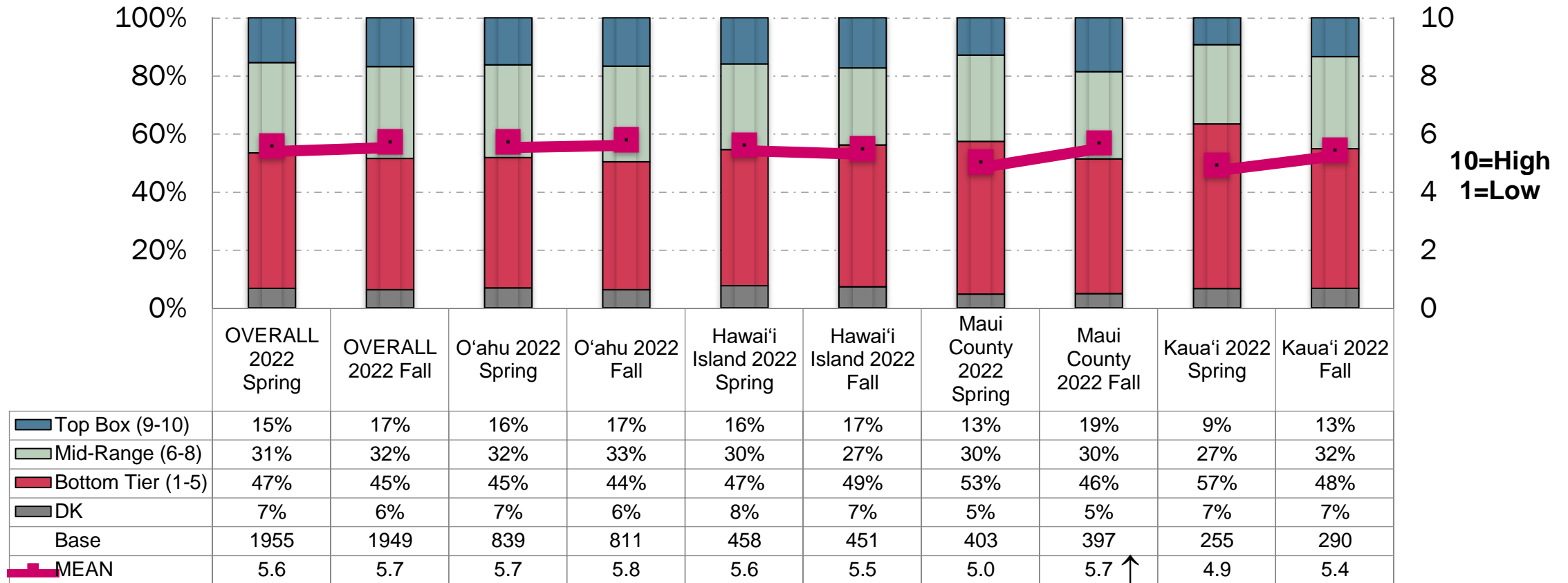
“Tourism supports our local businesses like retail, dining, etc.”

– *By Demographics*



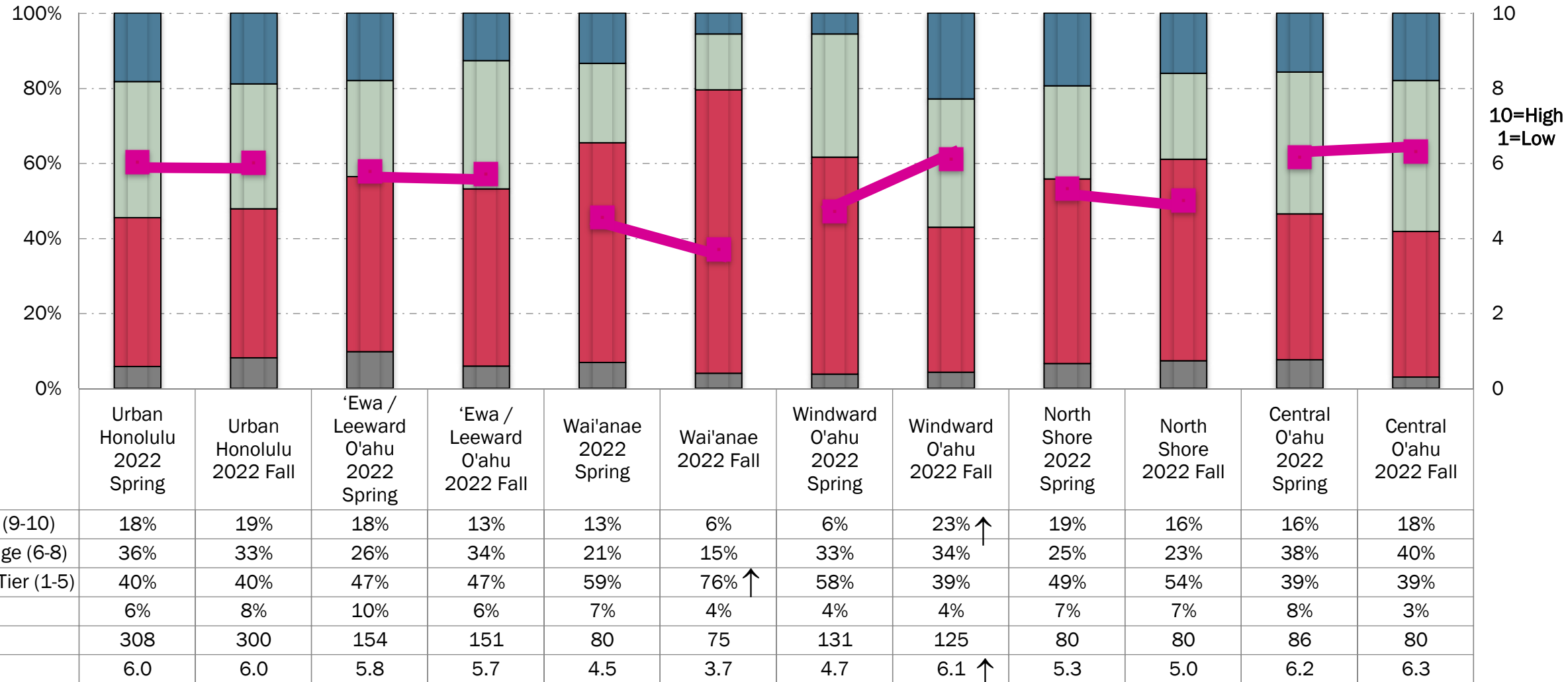
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By County*



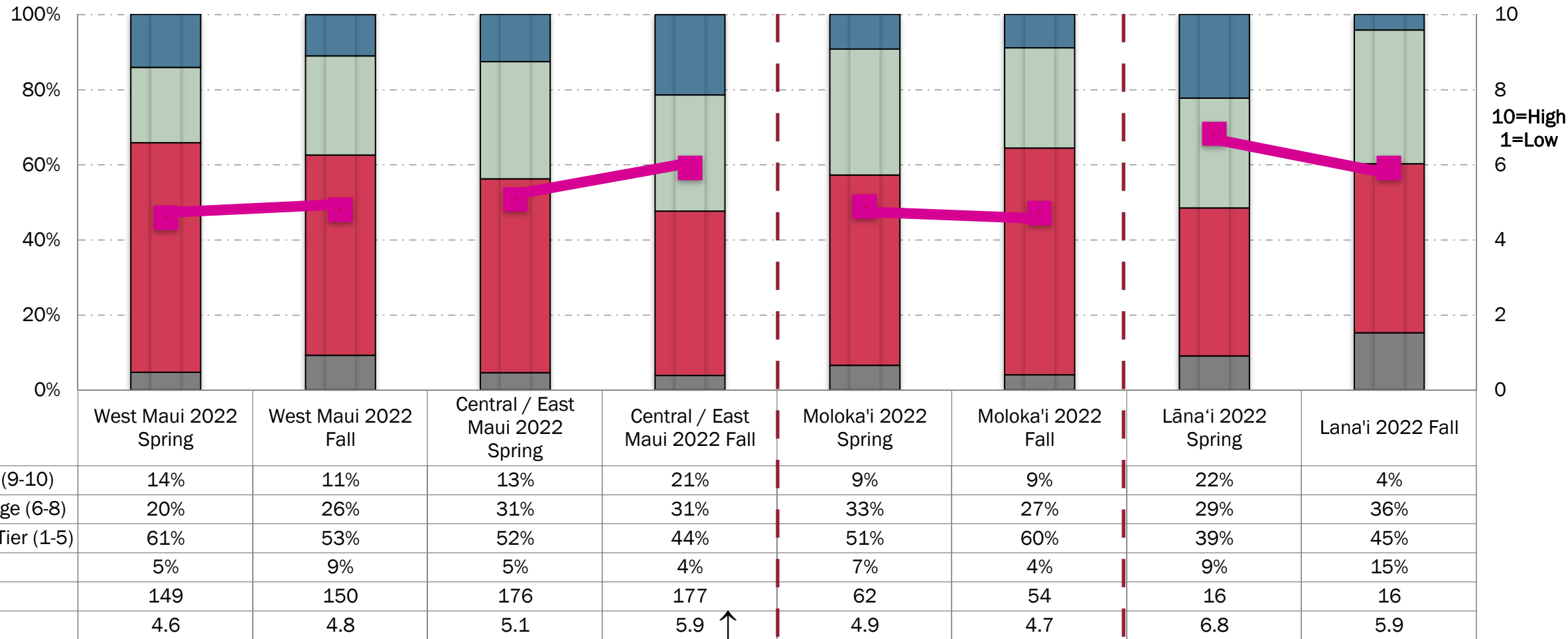
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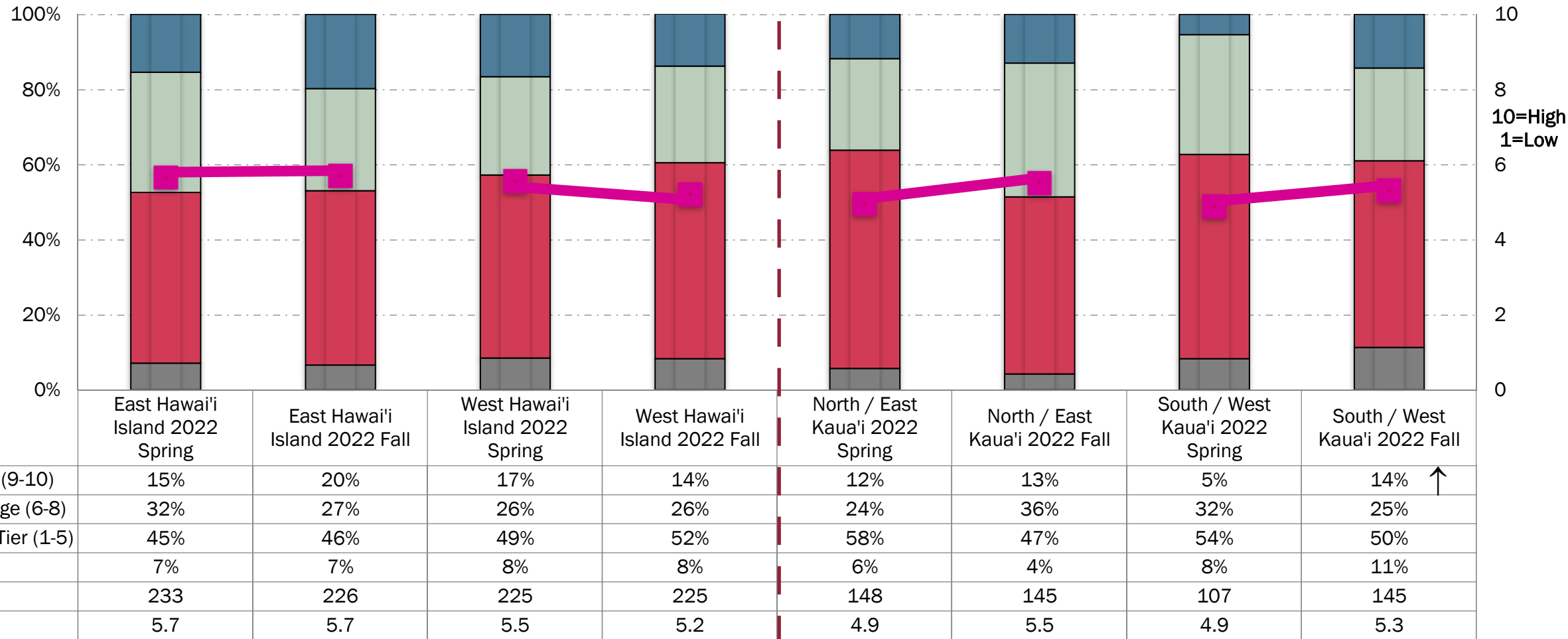
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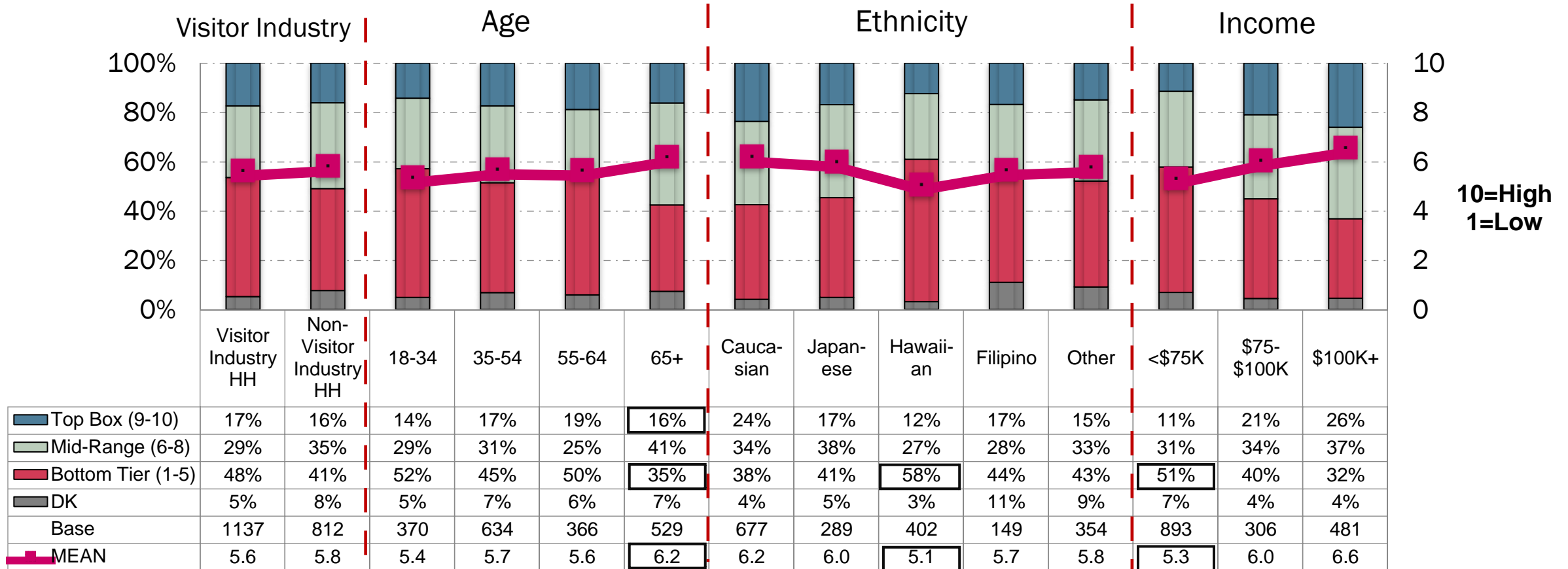
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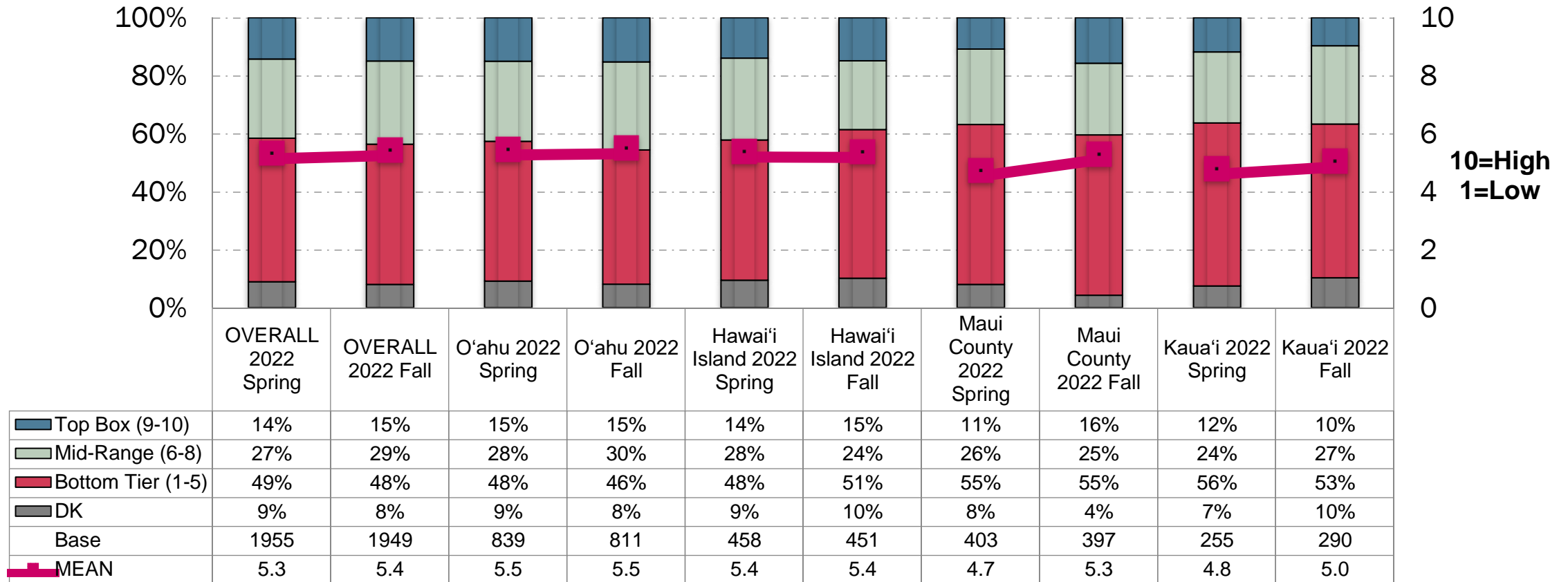
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By Demographics*



Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like tourism is being better managed on my island”

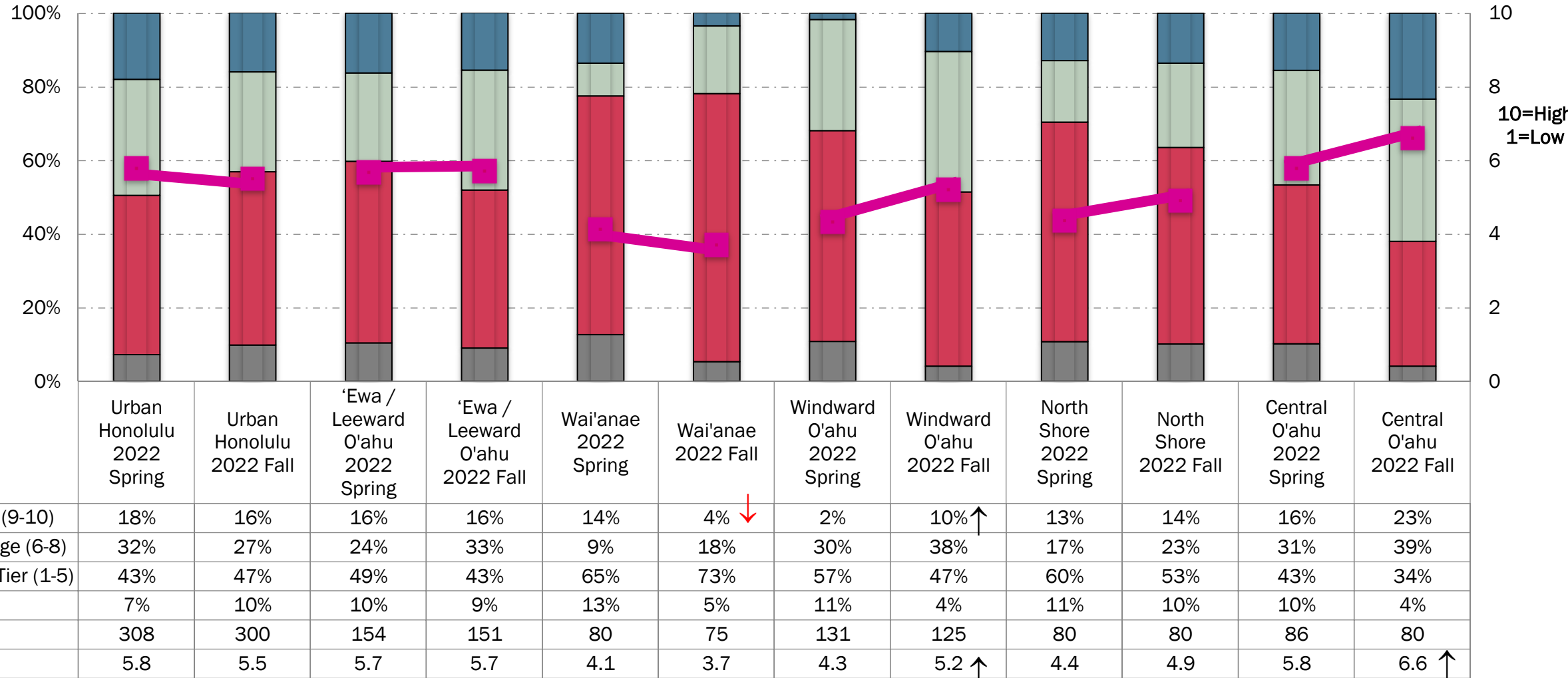
– *By County*



Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like tourism is being better managed on my island”

- *By Area (O‘ahu)*



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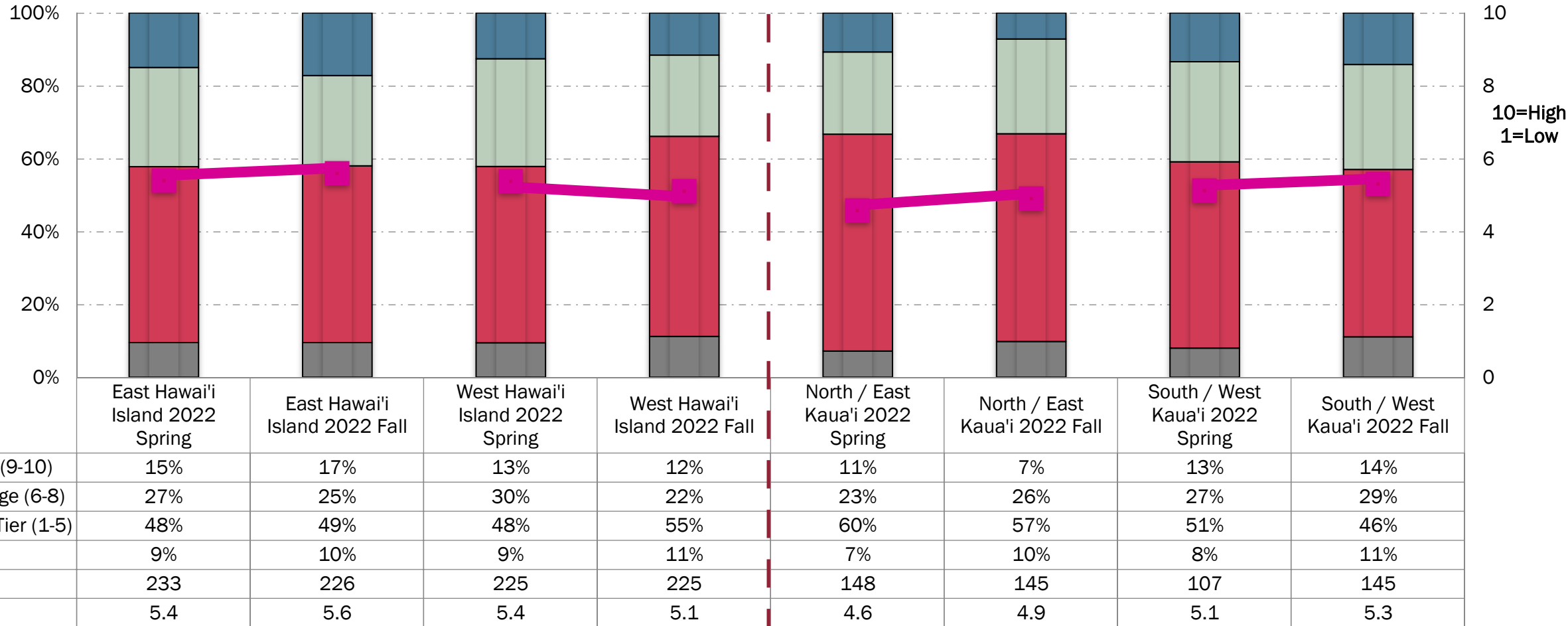
- *By Area (Maui County)*



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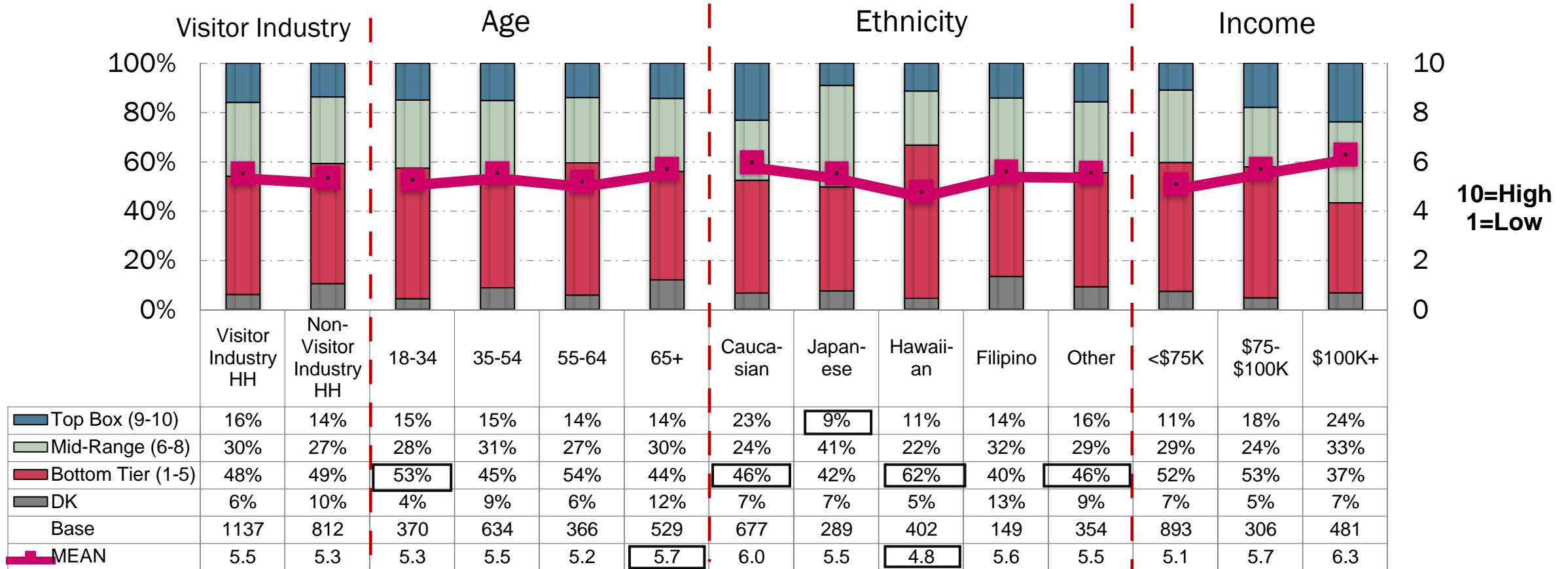
- *By Area (Hawai'i Island & Kaua'i)*



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“I feel like tourism is being better managed on my island”

– *By Demographics*



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Appendix A: Island Supplement

Key Recommendations & Takeaways – O‘ahu

1 *Perception of the industry continues to make positive headway:* Overall sentiment among O‘ahu residents crept upwards with residents acknowledging the benefits from the industry and that tourism is better managed overall. This rebound lifted the State as a whole on a directional basis although current perceptions are still below historic levels.

Key Resident Sentiment Tracking Statements (O‘ahu)				
Mean Score	Spring 2021	Fall 2021	Spring 2022	Fall 2022
<i>Tourism has brought more benefits than problems</i>	6.00	5.79	6.05	6.11
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	--	--	--	6.85
<i>Perceived impact of tourism on you and your family</i>	5.96	6.02	6.04	6.16
<i>Tourism is being better managed on my island</i>	5.13	5.14	5.33↑	5.50
<i>My island is run for tourists at expense of local people</i>	6.77	7.01	6.80	6.93

Taking into account all the benefits and problems created by tourism, residents on O‘ahu and Hawai‘i Island continue to be more likely to say that the industry should be actively encouraged on their island compared to Maui or Kaua‘i.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>Tourism should be actively encouraged on my island</i>	6.1	6.2	5.8	5.5

*Red font indicates questions where higher ratings are worse for Tourism sentiment.

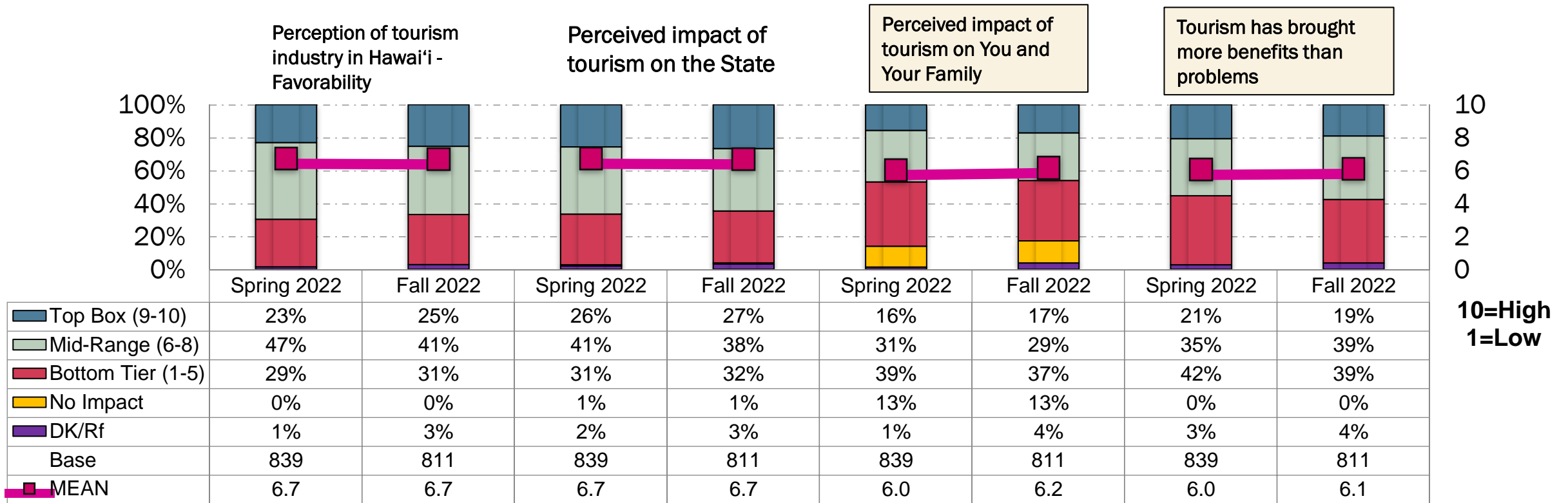
2 *Resident Sentiment did not recover across all communities:* Recovery in sentiment, however, was not distributed evenly throughout the island with the urban core of Honolulu, ‘Ewa/Leeward, Central O‘ahu, Windward side, and North Shore residents reporting slight improvements while the Wai‘anae Coast remained lower.

3 *Support for Managed Tourism Strategies remains strong, particularly among Honolulu and North Shore communities:* Although O‘ahu residents generally supported these initiatives, strategies resonated differently across communities. Strategies to limit vacation units and educating visitors was especially popular among Honolulu and the North Shore; while all communities had similar perceptions in controlling visitor access to parks or charging them fees.

Mean Score	Honolulu	‘Ewa Leeward	Wai‘anae	Windward	North Shore	Central
<i>No additional hotel/condo units</i>	7.4	7.0	7.5	7.0	8.0	6.5
<i>Eliminate illegal rentals</i>	8.2	7.3	6.5	7.4	7.7	6.9
<i>Stop approval of vacation rentals</i>	7.3	6.4	6.1	6.6	7.5	6.4
<i>Educate visitors to mālama the islands</i>	8.9	8.3	8.3	8.6	9.3	8.6

4 While public awareness of Destination Management Action Plans is relatively low at 21 percent, among those aware, over 77 percent could recall this plan’s efforts.

O‘ahu – Key High Level Resident Sentiment Indicators



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

O'ahu – Key Island-Specific Resident Sentiment Indicators

Negative Impacts

Tourism Management

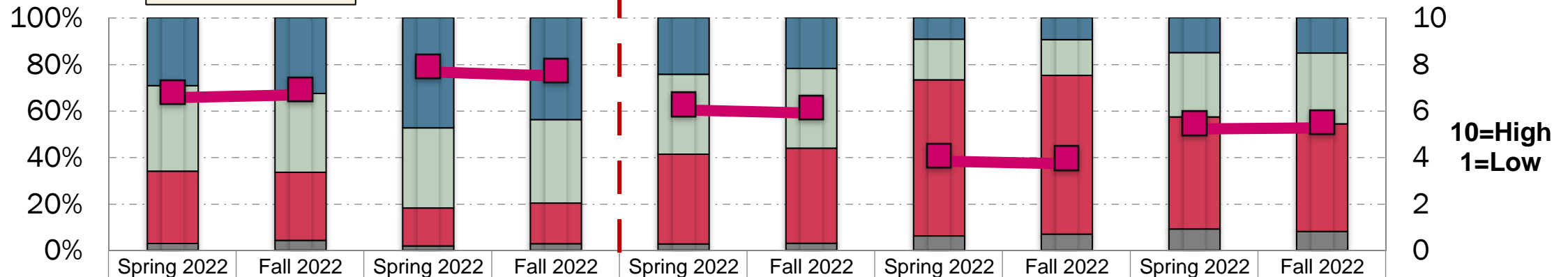
The Island is run for tourists at expense of local people

My Island's economy is too dependent on tourism

Tourism should be actively encouraged on my Island

Feel I have a voice in my Island's tourism development decisions

I feel like tourism is being better managed on my Island



	Spring 2022	Fall 2022	Spring 2022	Fall 2022	Spring 2022	Fall 2022	Spring 2022	Fall 2022	Spring 2022	Fall 2022
Top Box (9-10)	29%	33%	47%	44%	24%	22%	9%	9%	15%	15%
Mid-Range (6-8)	37%	34%	34%	36%	34%	34%	17%	15%	28%	30%
Bottom Tier (1-5)	31%	29%	16%	17%	39%	41%	67%	68%	48%	46%
DK	3%	4%	2%	3%	3%	3%	6%	7%	9%	8%
Base	839	811	839	811	839	811	839	811	839	811
MEAN	6.8	6.9	7.9	7.7	6.3	6.1	4.1	4.0	5.5	5.5

Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Key Recommendations & Takeaways – Maui County

1 *Sentiment has improved significantly among Maui County residents in Key Tracking Statements:* Perceptions of the industry surged in Fall'22, finally reversing the downturn from lower scores during the pandemic. This improvement lifted scores to their levels reported in the start of the pandemic in Key Tracking statements and have helped many in the county to conclude that the industry's benefits outweigh the problems, and that tourism is good for their families.

Key Resident Sentiment Tracking Statements (Maui County)				
Mean Score	Spring 2021	Fall 2021	Spring 2022	Fall 2022 ↑
<i>Tourism has brought more benefits than problems</i>	5.41	5.21	5.34	6.11 ↑
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	--	--	--	6.67
<i>Perceived impact of tourism on you and your family</i>	5.81	5.97	5.72	6.40 ↑
<i>My island is run for tourists at expense of local people</i>	6.93	7.18	8.01 ↑	7.11 ↓
<i>My Island's economy is too dependent on tourism</i>	7.85	7.72	8.30 ↑	7.68 ↓

2 *Community trends:* Improvements in Maui County overall were due to significant gains made in Central and Eastern Maui which perceived the industry favorably. West Mau'i and Moloka'i communities remained unchanged while residents of Lāna'i continue to be receptive to tourism and its benefits compared to other areas in the county.

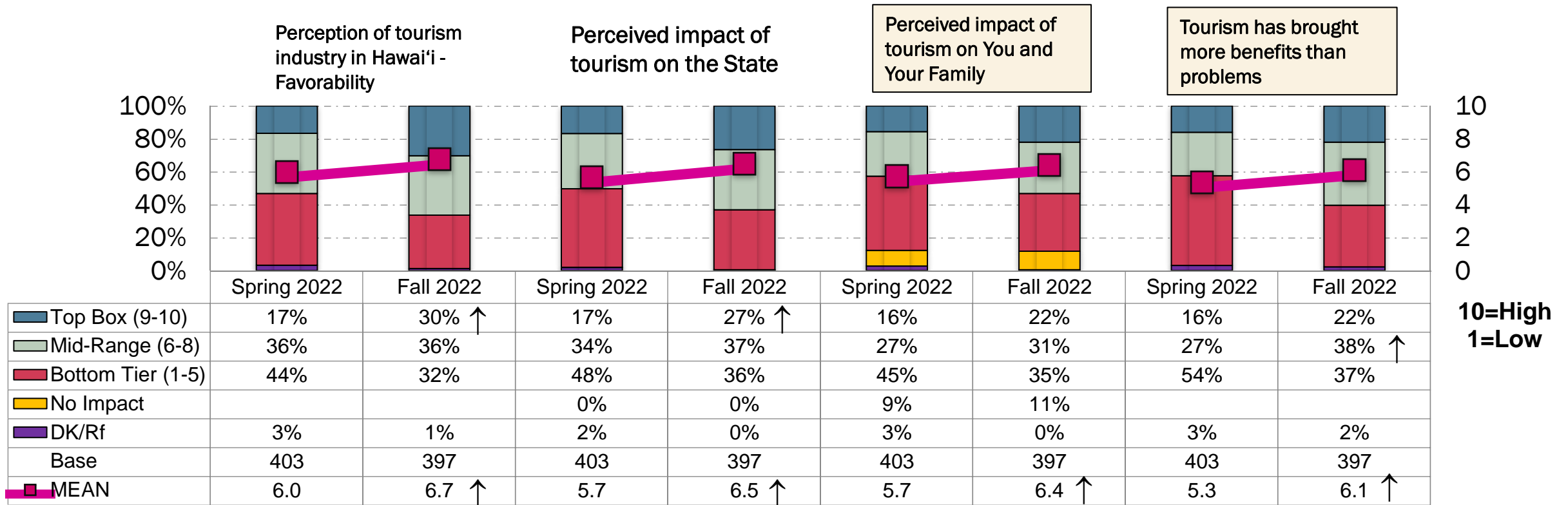
3 *Residents are receptive to Managed Tourism Strategies:* Maui County is particularly amenable to better management of Accommodations and Access as potential solutions to the problems caused by the industry. Support among county residents was much higher than the State overall.

Mean Score	Maui County	Gap to the State
<i>Eliminate illegal vacation rentals</i>	8.27	+0.46
<i>Stop approval of vacation rentals</i>	7.74	+0.79
<i>No additional hotel/condo/timeshare units</i>	7.76	+0.55
<i>Charge visitor access fees to state parks and trails</i>	7.37	+0.34
<i>Encourage visitors to volunteer and give back</i>	7.26	+0.11

4 While public awareness of Destination Management Action Plans is relatively low at 24 percent, among those aware, most could recall the plan's initiatives on Maui, Moloka'i, and Lāna'i.

*Red font indicates questions where higher ratings are worse for Tourism sentiment.

Maui County – Key High Level Resident Sentiment Indicators

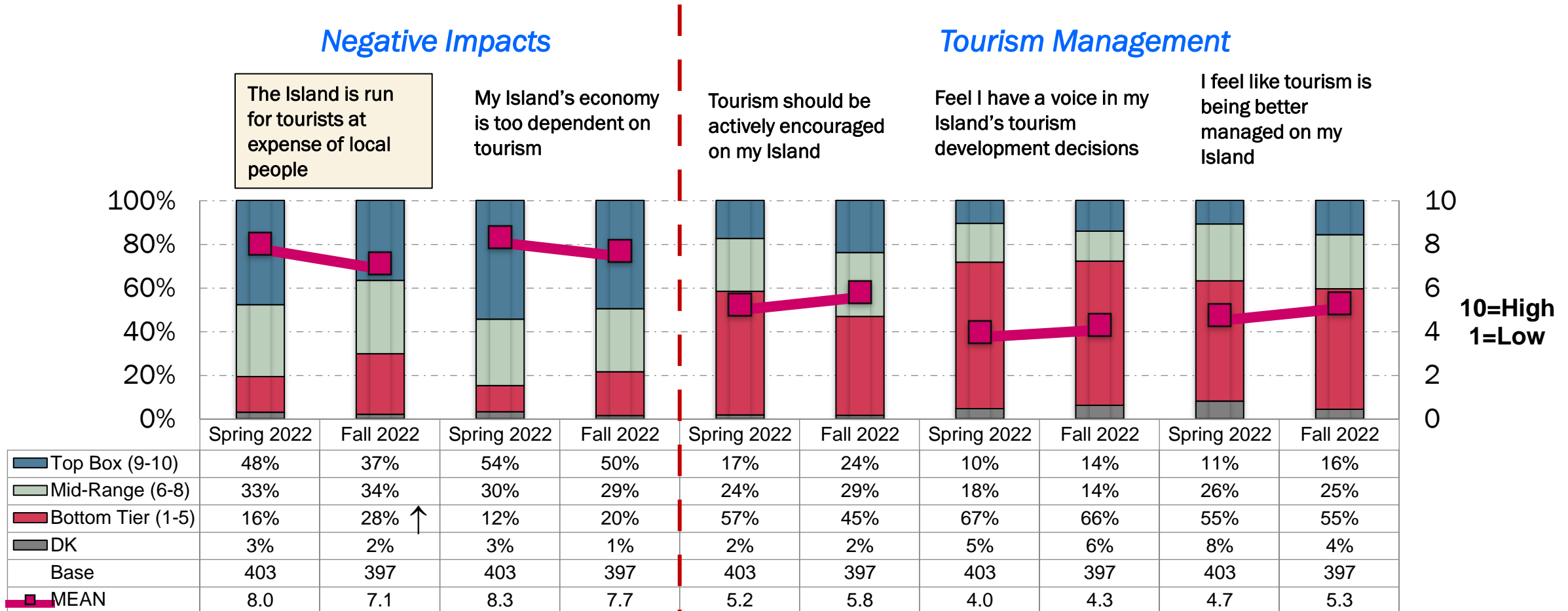


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Maui County – Key Island-Specific Resident Sentiment Indicators



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Key Recommendations & Takeaways – Hawai‘i Island

- 1 Resident sentiment has made gains and is now at levels seen in 2020:** Key indicators of resident sentiment continued to improve in Fall'22 in the vital measures of the industry providing more benefits than problems and being better managed overall.

Key Resident Sentiment Tracking Statements (Hawai‘i Island)				
Mean Score	Spring 2021	Fall 2021	Spring 2022	Fall 2022
Tourism has brought more benefits than problems	5.70	5.60	5.99	5.84
Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.	--	--	--	6.72
Perceived impact of tourism on you and your family	5.81	5.91	6.18	6.34
Tourism should be actively encouraged on my Island	6.15	5.78 ↑	6.27	6.22
<i>My island is run for tourists at expense of local people</i>	6.59	6.63	6.51	6.62

Opinions that tourism should be encouraged on Hawai‘i island outpaced the rest of the State providing further evidence that residents perceive the industry favorably.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
Tourism should be actively encouraged on my Island	6.1	6.2	5.8	5.5

*Red font indicates questions where higher ratings are worse for Tourism sentiment.

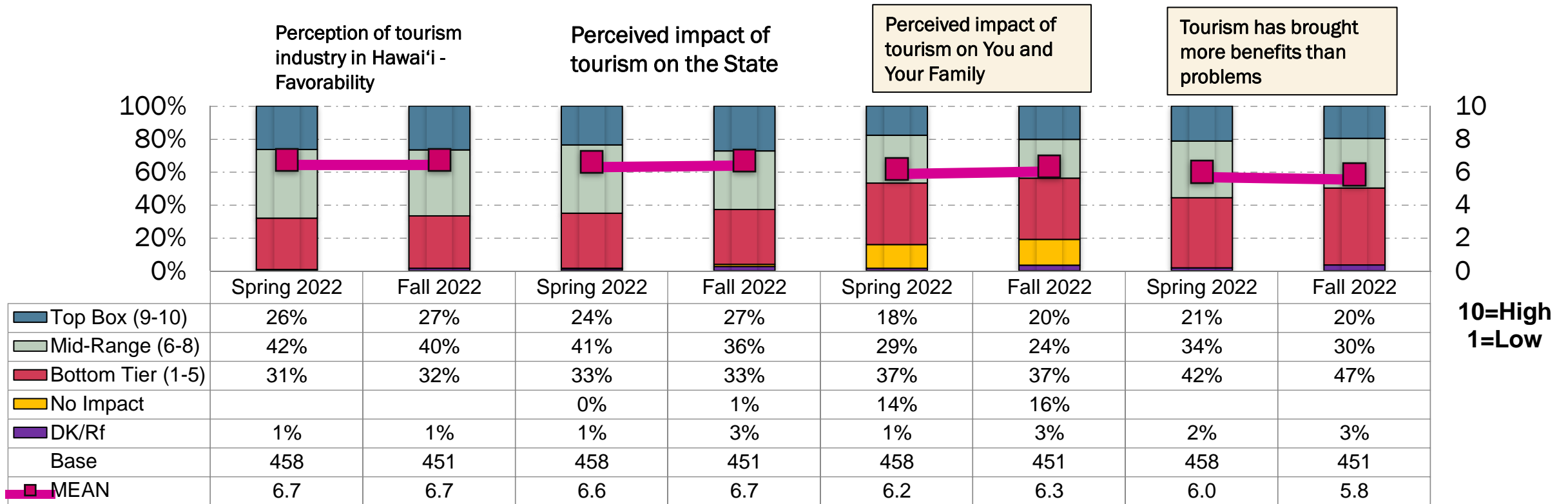
- 2 Community Differences:** Support for the industry was higher in Eastern Hawai‘i communities, particularly in creating shopping/dining, perpetuating Native Hawaiian culture, and supporting other industries such as agriculture. These factors resulted in higher perceptions among Eastern Hawai‘i residents that tourism enhances quality of life.

- 3 Support for Managed Tourism Strategies aligns with the problems generated by the industry:** Hawai‘i Island residents were in-line with O‘ahu on their reception to management strategies. While those on Hawai‘i island were generally supportive of measures to manage Accommodations and Education – residents of Maui and Kaua‘i reported greater support for these measures.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
Eliminate illegal vacation rentals	7.6	8.0	8.3	8.4
No additional hotel/ condo units	7.2	6.8	7.8	7.9
Charge access fees to state parks/trails	6.9	7.0	7.4	7.6
Encourage visitors to volunteer/give back	7.1	7.3	7.3	7.6

- 4** While public awareness of Destination Management Action Plans is relatively low at 20 percent, among those aware, over 74 percent could recall this plan’s initiatives.

Hawai'i Island – Key High Level Resident Sentiment Indicators

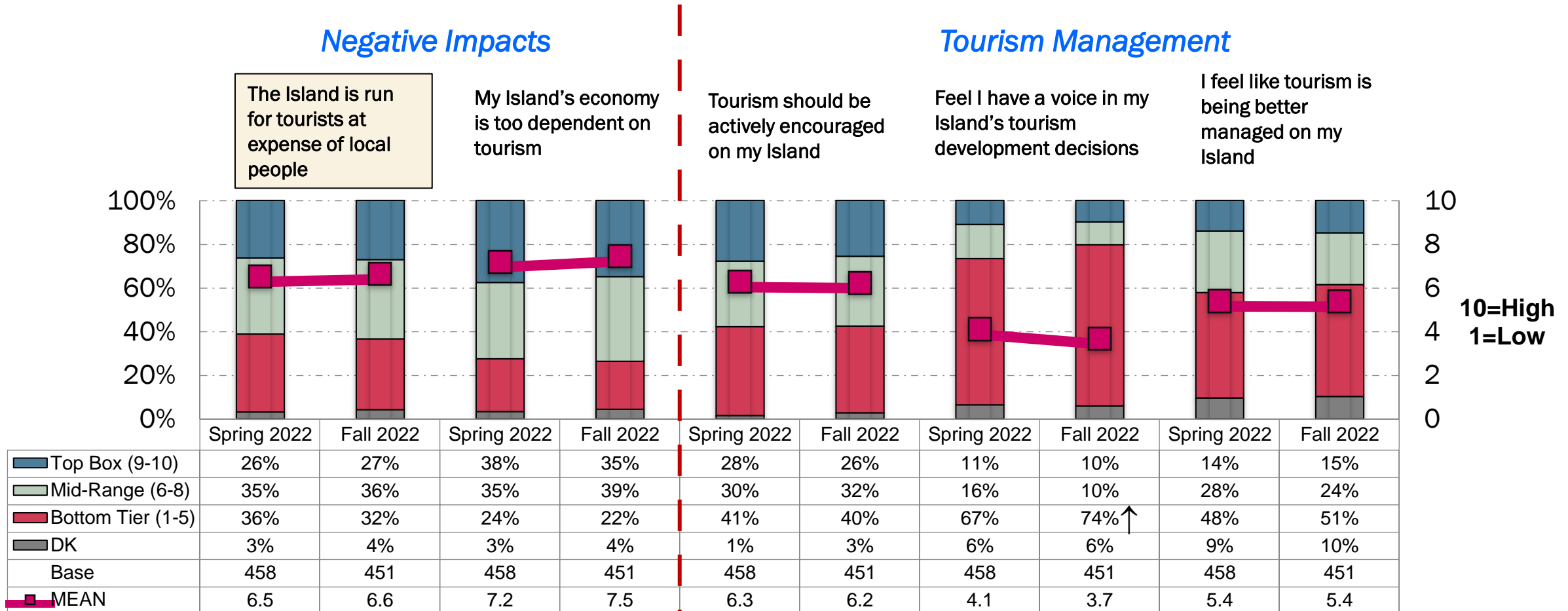


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Hawai'i Island – Key Island-Specific Resident Sentiment Indicators



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Key Recommendations & Takeaways – Kaua‘i

1 *Key Sentiment Indicators made incremental gains:* Similar to other islands, perceptions of the industry made slight improvements among Kaua‘i residents. Improvements that tourism’s benefits outweighs the risks and that the industry is positive for families were enough to increase metrics to 2020 levels.

Key Resident Sentiment Tracking Statements (Kaua‘i)				
Mean Score	Spring 2021	Fall 2021	Spring 2022	Fall 2022
<i>Tourism has brought more benefits than problems</i>	5.48	5.22	5.61	5.72
<i>Perceived impact of tourism on you and your family</i>	5.74	6.27	5.97	6.14
<i>Tourism is being better managed on my island</i>	5.23	5.26	4.79	5.04
<i>My island is run for tourists at expense of local people</i>	7.04	7.07	7.43	7.15

Although gains were made in Fall’22, perceptions among Kaua‘i residents were lower compared to the State of Hawai‘i overall, with many emphasizing that they do not perceive that management of the industry is benefiting them and thus should not be actively encouraged.

Mean Score	Kaua‘i	Gap to the State
<i>Tourism helps fund stewardship of Hawai‘i’s natural resources, parks and cultural sites</i>	5.85	-0.32
<i>Tourism should be actively encouraged on my island</i>	5.53	-0.54
<i>My island is too dependent on tourism</i>	8.12	0.42

*Red font indicates questions where higher ratings are worse for Tourism sentiment.

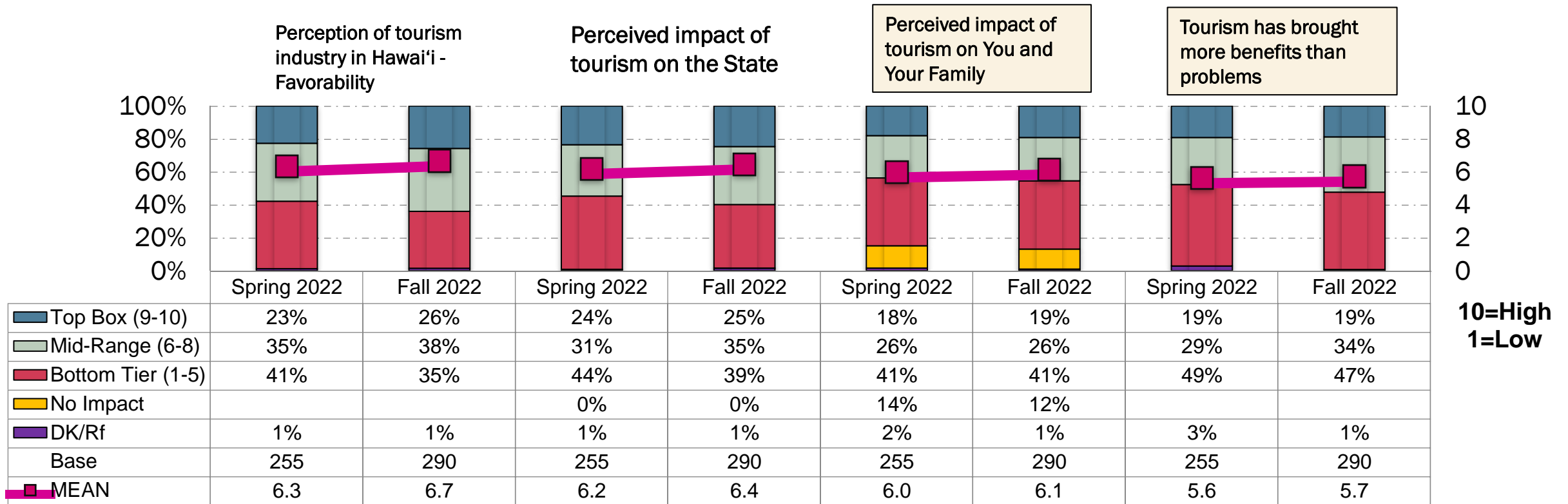
2 *Resident Sentiment is similar across Kaua‘i communities:* There were no significant differences between Key Tracking statements across counties, indicating that all areas are not feeling the benefits of the industry compared to their problems.

3 *Kaua‘i reports the strongest support for Managed Tourism Strategies in the State:* Residents are supportive of strategies to better manage the industry compared to the State overall related to Accommodations, Access, and Educating visitors in order to mitigate the negative impacts. Kaua‘i residents were in favor of these measures by nearly half a mean point or more compared to the State overall.

Mean Score	Kaua‘i	Gap to the State
<i>Eliminate illegal vacation rentals</i>	8.39	+0.59
<i>No additional hotel/condo/timeshare units</i>	7.85	+0.65
<i>Stop approval of additional legal vacation rentals</i>	7.49	+0.55
<i>Charge access fees to state parks/trails</i>	7.60	+0.57
<i>Encourage visitors to volunteer/give back</i>	7.60	+0.45

4 While public awareness of Destination Management Action Plans is relatively low at 22 percent, among those aware, over two-thirds could recall this plan’s individual efforts.

Kaua'i – Key High Level Resident Sentiment Indicators

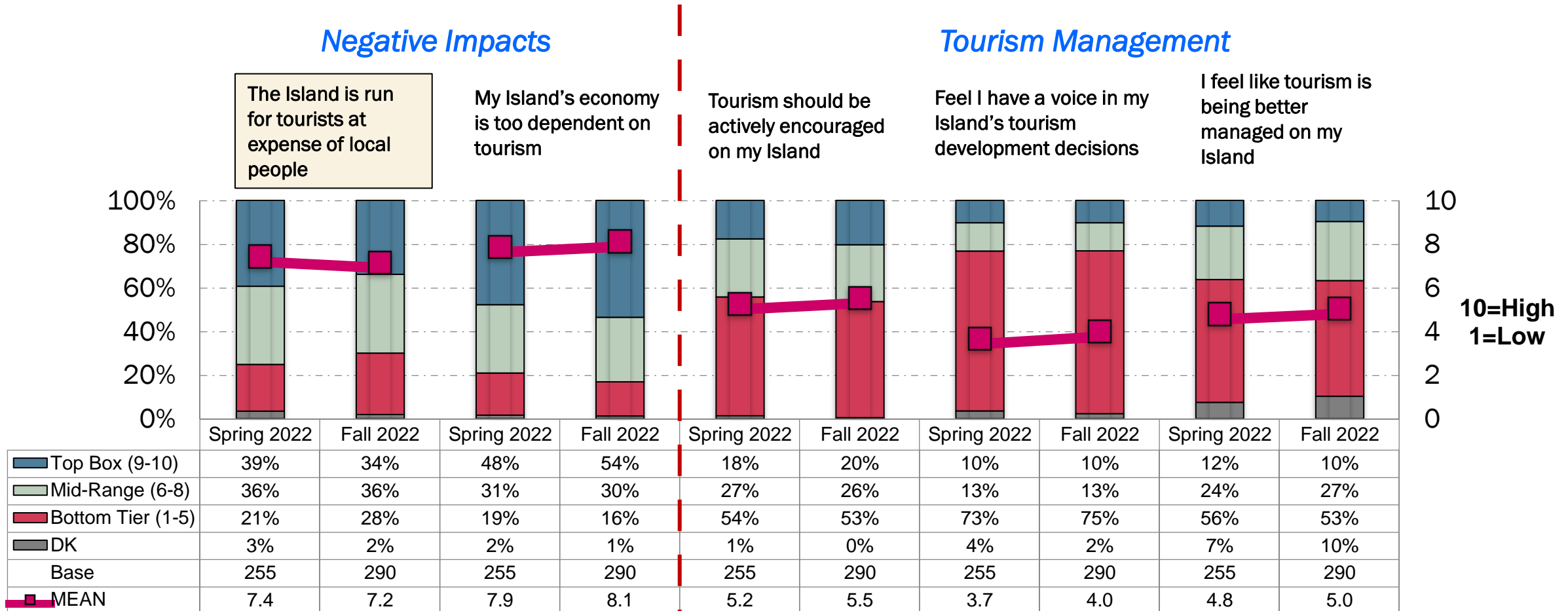


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Kaua'i – Key Island-Specific Resident Sentiment Indicators

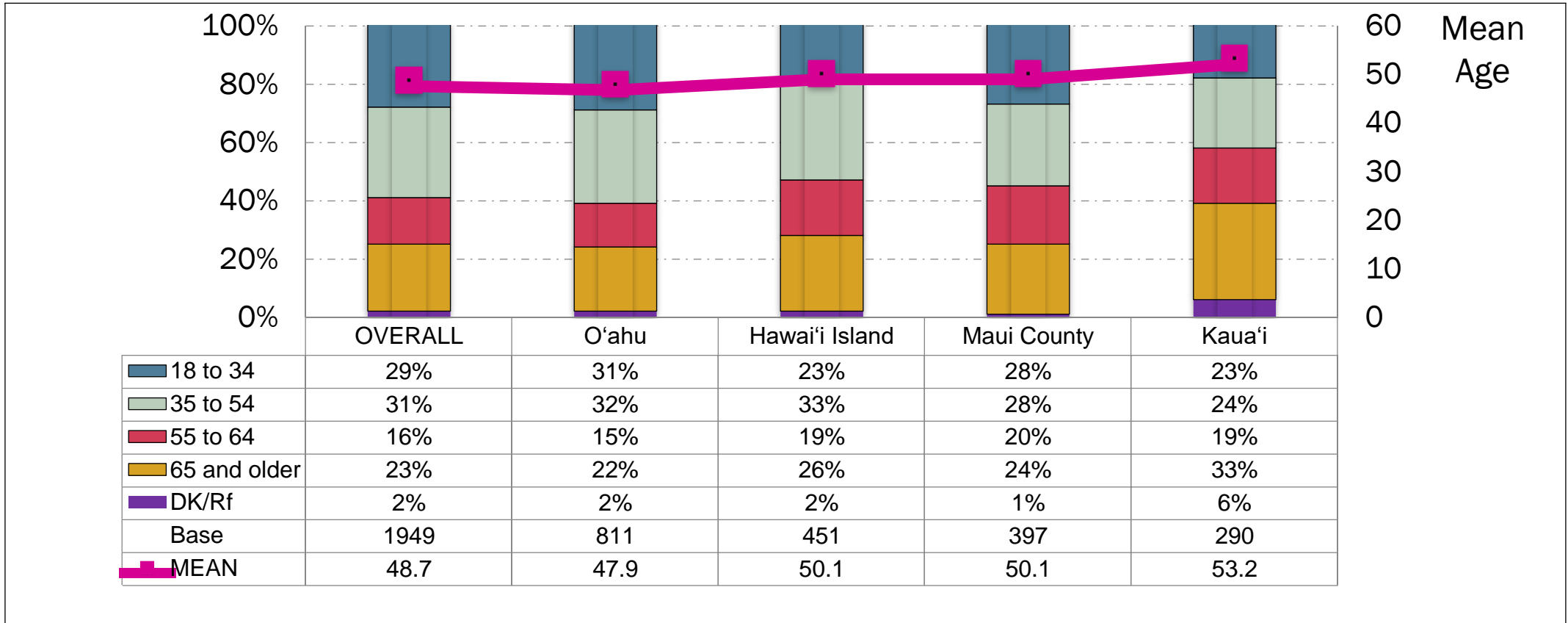


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?



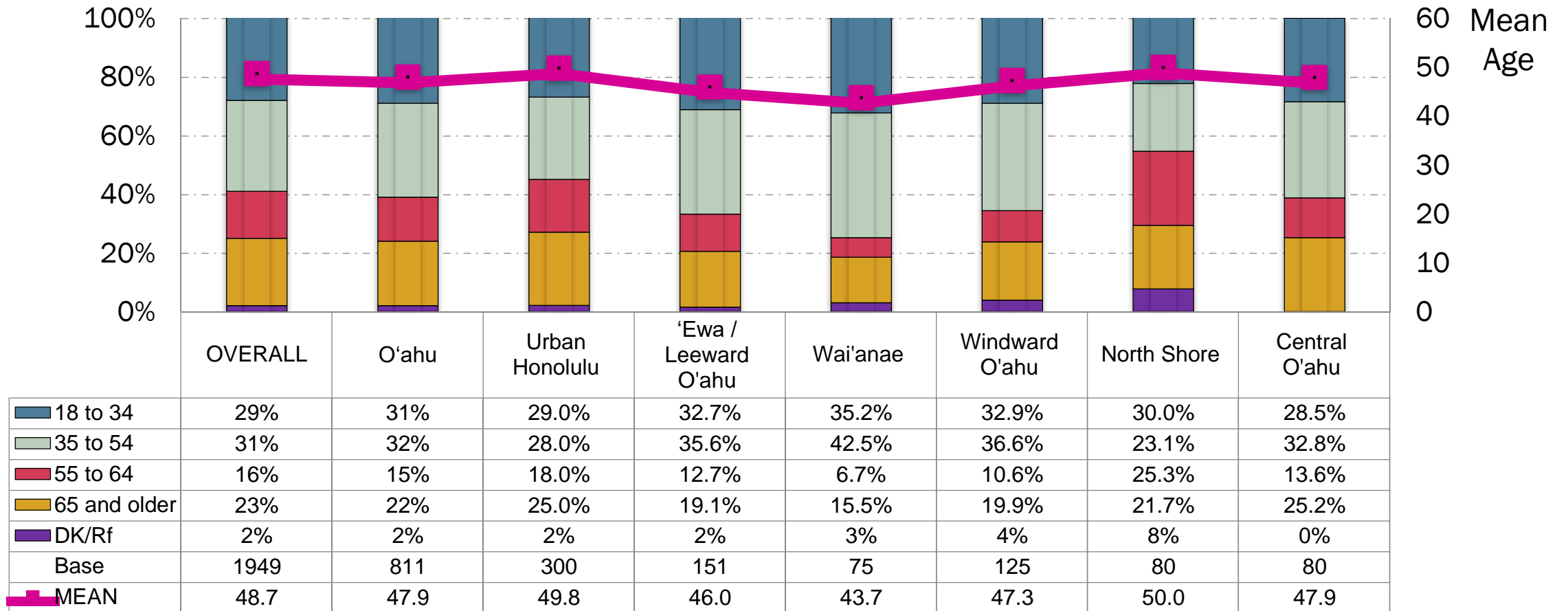
Appendix B: Respondent Profile

Respondent Age



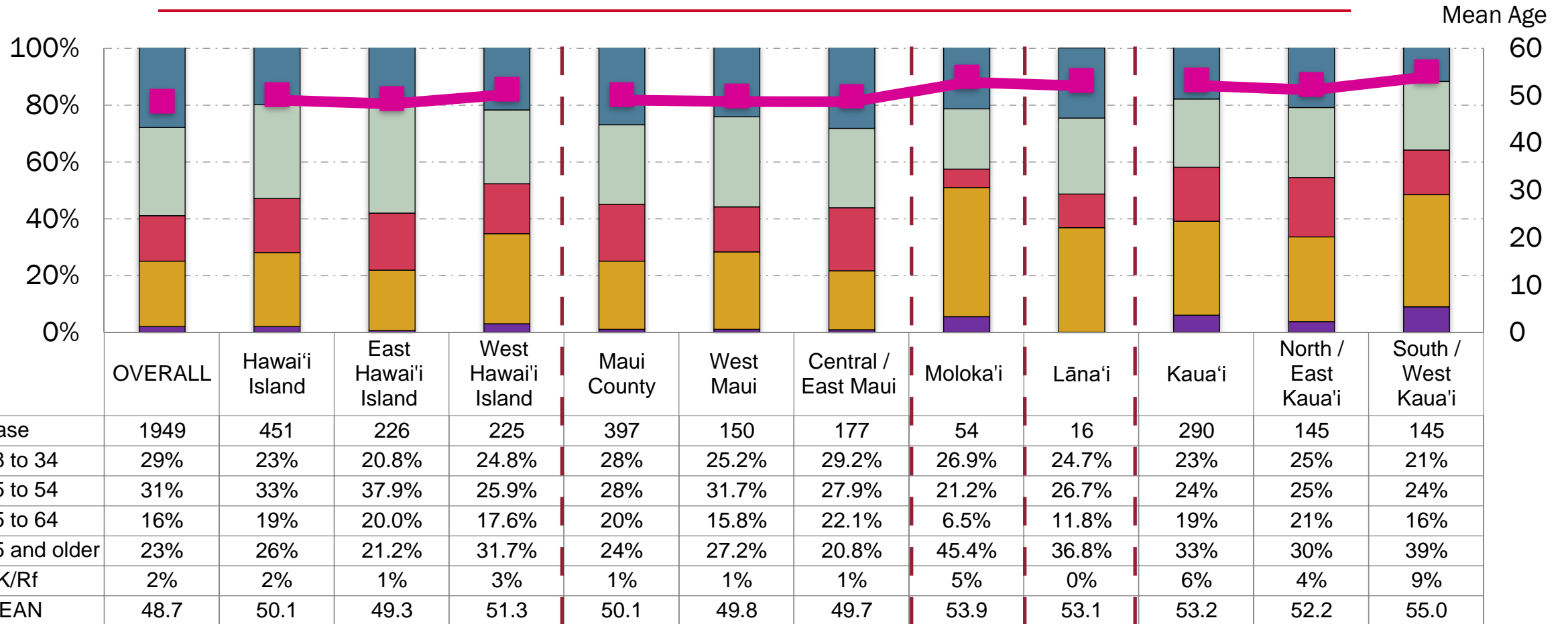
D1: What was your age on your last birthday?

Respondent Age (*By Area – O‘ahu*)



D1: What was your age on your last birthday?

Respondent Age (*By Area - Hawai'i Island, Maui, & Kaua'i*)



D1: What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	20%	15%	30%	30%	26%
Japanese	18%	22%	9%	8%	9%
Hawaiian	23%	21%	26%	27%	24%
Filipino	10%	9%	9%	14%	18%
Other	30%	32%	25%	21%	22%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Caucasian	20%	15%	18%	11%	7%	19%	23%	16%
Japanese	18%	22%	25%	24%	-	14%	2%	33%
Hawaiian	23%	21%	13%	25%	63%	26%	29%	15%
Filipino	10%	9%	5%	19%	3%	6%	2%	3%
Other	30%	32%	38%	21%	27%	34%	45%	34%

D2: What is your ethnic background?

Respondent Ethnicity

(By Area - Hawai'i Island, Maui, & Kaua'i)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Caucasian	20%	30%	25%	37%	30%	26%	33%	12%	5%	26%	26%	26%
Japanese	18%	9%	13%	4%	8%	9%	8%	1%	13%	9%	10%	9%
Hawaiian	23%	26%	27%	26%	27%	25%	24%	73%	22%	24%	24%	25%
Filipino	10%	9%	10%	8%	14%	25%	11%	3%	44%	18%	17%	20%
Other	30%	25%	26%	24%	21%	15%	23%	12%	16%	22%	23%	19%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	47%	45%	50%	53%	45%
3-4	34%	36%	30%	30%	31%
5-6	12%	12%	13%	10%	14%
7+	5%	4%	6%	4%	7%
REFUSED	4%	3%	4%	5%	6%
MEAN	3.0	3.0	3.0	2.9	3.1

D3: How many people, including yourself, live in your household?

Household Size (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
1-2	47%	45%	55%	34%	39%	47%	35%	43%
3-4	34%	36%	31%	41%	29%	38%	30%	44%
5-6	12%	12%	9%	14%	19%	8%	23%	11%
7+	5%	4%	2%	7%	10%	5%	13%	1%
REFUSED	4%	3%	4%	3%	6%	4%	4%	-
MEAN	3.0	3.0	2.5	3.6	3.4	2.9	4.1	2.9

D3: How many people, including yourself, live in your household?

Household Size

(By Area - Hawai'i Island, Maui, & Kaua'i)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	47%	50%	46%	54%	53%	51%	54%	44%	53%	45%	46%	43%
3-4	34%	30%	36%	22%	30%	29%	31%	28%	32%	31%	33%	28%
5-6	12%	13%	13%	14%	10%	9%	8%	27%	9%	14%	13%	15%
7+	5%	6%	4%	9%	4%	4%	4%	1%	-	7%	3%	13%
REFUSED	4%	4%	3%	5%	5%	8%	5%	1%	6%	6%	6%	6%
MEAN	3.0	3.0	3.0	3.1	2.9	2.7	2.9	3.1	2.8	3.1	2.9	3.4

D3: How many people, including yourself, live in your household?

Marital Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Single, never married	33%	35%	27%	32%	26%
Married	43%	43%	44%	43%	42%
Divorced, separated, widowed	15%	14%	18%	17%	22%
Domestic Partnership	6%	5%	9%	5%	4%
Other	0%	0%	1%	0%	-
Refused	3%	3%	2%	2%	6%

D4: What is your marital status?

Marital Status (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Single, never married	33%	35%	37%	34%	42%	41%	24%	23%
Married	43%	43%	42%	39%	31%	45%	51%	55%
Divorced, separated, widowed	15%	14%	13%	17%	11%	11%	17%	13%
Domestic Partnership	6%	5%	6%	6%	10%	1%	2%	6%
Other	0%	0%	-	-	-	-	-	1%
Refused	3%	3%	3%	4%	6%	2%	6%	1%

D4: What is your marital status?

Marital Status (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Single, never married	33%	27%	25%	29%	32%	38%	31%	31%	19%	26%	27%	24%
Married	43%	44%	45%	42%	43%	38%	44%	46%	47%	42%	40%	46%
Divorced, separated, widowed	15%	18%	17%	18%	17%	14%	17%	21%	25%	22%	22%	22%
Domestic Partnership	6%	9%	12%	6%	5%	6%	6%	-	6%	4%	6%	-
Other	0%	1%	1%	1%	0%	1%	0%	-	-	-	-	-
Refused	3%	2%	0%	4%	2%	2%	2%	3%	3%	6%	5%	8%

D4: What is your marital status?

Education

	OVERALL	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
H.S. or less	21%	20%	25%	23%	26%
Bus/ Trade School/Some college	27%	26%	32%	27%	32%
College Graduate	51%	54%	43%	50%	42%
DK/Refused	2%	2%	2%	3%	5%

D5. What is the last grade in school you completed?

Education (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
H.S. or less	21%	20%	13%	29%	42%	12%	13%	20%
Bus/ Trade School/Some college	27%	26%	24%	22%	33%	33%	44%	24%
College Graduate	51%	54%	60%	47%	20%	53%	40%	56%
DK/Refused	2%	2%	2%	2%	4%	2%	2%	0%

D5. What is the last grade in school you completed?

Education (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
H.S. or less	21%	25%	23%	26%	23%	31%	19%	32%	37%	26%	25%	23%
Bus/ Trade School/Some college	27%	32%	34%	29%	27%	27%	27%	13%	18%	32%	31%	29%
College Graduate	51%	43%	43%	41%	50%	40%	51%	53%	45%	42%	41%	38%
DK/Refused	2%	2%	1%	5%	3%	2%	3%	3%	0%	5%	3%	9%

D5. What is the last grade in school you completed?

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	58%	58%	54%	58%	60%
Not Employed	42%	42%	46%	42%	40%

D6: Are you currently employed?

Employment Status (*By Area*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Currently Employed	58%	58%	61%	56%	60%	58%	48%	54%
Not Employed	42%	42%	39%	44%	40%	42%	52%	46%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	58%	54%	55%	53%	58%	69%	56%	52%	63%	60%	62%	58%
Not Employed	42%	46%	45%	47%	42%	31%	44%	48%	37%	40%	38%	42%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	50%	50%	47%	52%	43%
FEMALE	50%	50%	53%	48%	57%

D7: What is your gender?

Gender (*By Area*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
MALE	50%	50%	56%	46%	42%	45%	50%	49%
FEMALE	50%	50%	44%	54%	58%	55%	50%	51%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
MALE	50%	47%	48%	45%	52%	57%	52%	51%	28%	43%	44%	43%
FEMALE	50%	53%	52%	55%	48%	43%	48%	49%	72%	57%	56%	57%

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	12%	13%	10%	11%	11%
Management	8%	8%	5%	14%	5%
Admin/clerical	6%	6%	6%	6%	7%
Service	7%	6%	7%	9%	11%
Sales	7%	7%	6%	7%	12%
Retired	25%	23%	28%	25%	30%
Other	26%	27%	27%	20%	21%
Unemployed	9%	9%	9%	7%	3%

D8: What is your occupation?

Occupation (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Professional	12%	13%	17%	11%	10%	10%	9%	7%
Management	8%	8%	6%	11%	7%	10%	6%	3%
Admin/clerical	6%	6%	4%	8%	3%	10%	4%	8%
Service	7%	6%	5%	7%	2%	8%	17%	8%
Sales	7%	7%	7%	6%	12%	6%	12%	6%
Retired	25%	23%	25%	20%	17%	22%	39%	28%
Other	26%	27%	27%	27%	36%	25%	9%	37%
Unemployed	9%	9%	9%	11%	13%	9%	5%	3%

Occupation (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Professional	12%	10%	11%	9%	11%	9%	12%	18%	8%	11%	10%	12%
Management	8%	5%	4%	7%	14%	12%	15%	-	10%	5%	5%	6%
Admin/clerical	6%	6%	7%	5%	6%	6%	5%	4%	13%	7%	10%	2%
Service	7%	7%	6%	8%	9%	16%	8%	2%	16%	11%	13%	7%
Sales	7%	6%	6%	7%	7%	6%	8%	2%	-	12%	13%	10%
Retired	25%	28%	24%	33%	25%	23%	23%	44%	37%	30%	26%	39%
Other	26%	27%	31%	26%	20%	24%	20%	29%	17%	21%	20%	21%
Unemployed	9%	9%	11%	6%	7%	4%	8%	2%	-	3%	4%	2%

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	14%	14%	18%	11%	10%
\$25K-\$35K	9%	9%	9%	9%	8%
\$35K-\$50K	11%	11%	12%	6%	10%
\$50K-\$75K	16%	17%	16%	13%	12%
\$75K-\$100K	15%	13%	16%	28%	18%
\$100K-\$150K	15%	16%	11%	13%	13%
\$150K-\$200K	7%	8%	6%	5%	6%
\$200K+	4%	5%	1%	2%	2%
DK/ Rf	10%	9%	10%	13%	21%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

Household Income (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
<\$25K	14%	14%	11%	19%	20%	12%	22%	15%
\$25K-\$35K	9%	9%	9%	11%	8%	7%	7%	8%
\$35K-\$50K	11%	11%	13%	6%	22%	15%	5%	6%
\$50K-\$75K	16%	17%	15%	18%	18%	15%	9%	21%
\$75K-\$100K	15%	13%	13%	11%	6%	7%	8%	26%
\$100K-\$150K	15%	16%	15%	21%	11%	17%	13%	7%
\$150K-\$200K	7%	8%	10%	7%	3%	8%	3%	4%
\$200K+	4%	5%	6%	2%	2%	7%	3%	4%
DK/ Rf	10%	9%	8%	5%	11%	14%	29%	8%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

Household Income (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
<\$25K	14%	18%	18%	20%	11%	7%	12%	9%	7%	10%	8%	13%
\$25K-\$35K	9%	9%	9%	10%	9%	7%	10%	1%	9%	8%	10%	5%
\$35K-\$50K	11%	12%	14%	10%	6%	9%	5%	8%	15%	10%	9%	11%
\$50K-\$75K	16%	16%	18%	13%	13%	15%	13%	10%	8%	12%	13%	10%
\$75K-\$100K	15%	16%	15%	18%	28%	25%	30%	12%	14%	18%	21%	13%
\$100K-\$150K	15%	11%	12%	10%	13%	15%	13%	10%	19%	13%	13%	13%
\$150K-\$200K	7%	6%	7%	5%	5%	3%	6%	-	-	6%	7%	3%
\$200K+	4%	1%	0%	3%	2%	2%	1%	7%	-	2%	3%	1%
DK/ Rf	10%	10%	9%	12%	13%	17%	10%	41%	28%	21%	15%	31%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

Years in Hawai'i

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Less than 10 years	12%	12%	14%	15%	7%
10 to 19 years	8%	8%	12%	6%	10%
20 years or more	20%	21%	21%	19%	23%
Born in Hawai'i	57%	58%	52%	58%	56%
DK/ Rf	2%	1%	2%	2%	5%

D10: How many years have you lived in Hawai'i?

Years in Hawai'i (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Less than 10 years	12%	12%	12%	12%	8%	12%	12%	14%
10 to 19 years	8%	8%	11%	3%	11%	7%	7%	5%
20 years or more	20%	21%	18%	24%	16%	22%	39%	16%
Born in Hawai'i	57%	58%	57%	60%	60%	57%	39%	65%
DK/ Rf	2%	1%	1%	1%	5%	2%	4%	-

D10: How many years have you lived in Hawai'i?

Years in Hawai'i (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Less than 10 years	12%	14%	9%	20%	15%	11%	18%	2%	8%	7%	6%	8%
10 to 19 years	8%	12%	13%	11%	6%	6%	6%	3%	3%	10%	12%	7%
20 years or more	20%	21%	15%	29%	19%	27%	16%	25%	27%	23%	23%	22%
Born in Hawai'i	57%	52%	62%	38%	58%	54%	57%	69%	62%	56%	56%	55%
DK/ Rf	2%	2%	1%	2%	2%	2%	3%	1%	-	5%	3%	8%

D10: How many years have you lived in Hawai'i?



Mahalo from the Omnitrak Group