

Resident Sentiment Survey Fall 2021



Prepared for the:
State of Hawai'i Department of Business,
Economic Development & Tourism: Project #5792
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Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813
Telephone: 1-808-528-4050
omnitrak@omnitrakgroup.com

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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 18 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 $n = 2,007$ respondents as follows:

- O'ahu: 853
- Hawai'i Island: 458
- Maui County: 419
- Kaua'i: 277

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 36%) and online surveys (64%).
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates:
November 8, 2021 through January 3, 2022



Key Recommendations & Takeaways

Key Recommendations & Takeaways – State Overall

1 *Key Indicators:* Overall indicators of resident sentiment continued to weaken in Fall 2021, though the decreases were largely not significant, compared to Spring 2021. The continued weakening in resident sentiment through the starts/stalls in Hawaii’s recovery suggests that longer-term concerns regarding the industry beyond visitor volume (e.g., impact on housing, low-paying jobs) also need to be addressed to strengthen resident sentiment.

Resident Sentiment on the statement *“My island is being run for tourists at the expense of local people”* inched higher to a mean score of 6.98.

On other key measures: *“Tourism has brought more benefits than problems”* and the *“Perceived impact of tourism on you and your family”*, also weakened directionally below Spring 2021 levels.

Key Resident Sentiment Tracking Statements				
Mean Score	2019	2020	Spring 2021	Fall 2021
<i>My island is run for tourists at expense of local people</i>	6.80	6.94	6.78	6.98
<i>Tourism has brought more benefits than problems</i>	6.25	6.02	5.87	5.67
<i>Perceived impact of tourism on you and your family</i>	6.54	6.11	5.91 ↓	6.01

2 *Managed Tourism Strategies:* The positive news is that opinions on *Managed Tourism* are trending upwards as more residents are open to the solutions they bring with them.

With approximately four-in-ten residents providing a positive (i.e., rating of 6 to 10) in their agreement that *“More effort is being made to balance economic benefits of tourism and quality of life for residents”* (44%) and *“Tourism is being better managed on my island”* (39%), attitudes toward managed tourism have improved directionally. In addition, attitudes towards **Regenerative strategies** (educating or encouraging visitors to give back or show respect) and better **Access Strategies** (charging fees for visitors) remain high or have trended upwards.

3 *Sentiment Drivers:* While *Economic and Quality of Life benefits of tourism (i.e., support for local businesses, jobs, shopping/entertainment opportunities)* continue to be the most important driver in improving resident sentiment, *Sustainability/Managed Tourism strategies* are the second most important driver and are gaining in influence.

In order to improve resident opinions that *“Tourism has brought more benefits than problems,”* program initiatives related to **Economic/Quality of Life benefits** (47%), **Sustainability and Managed Tourism attitudes** (30%) and better strategies on **Accommodations** (10%) hold the most weight as the “drivers” which influence resident attitudes toward tourism.

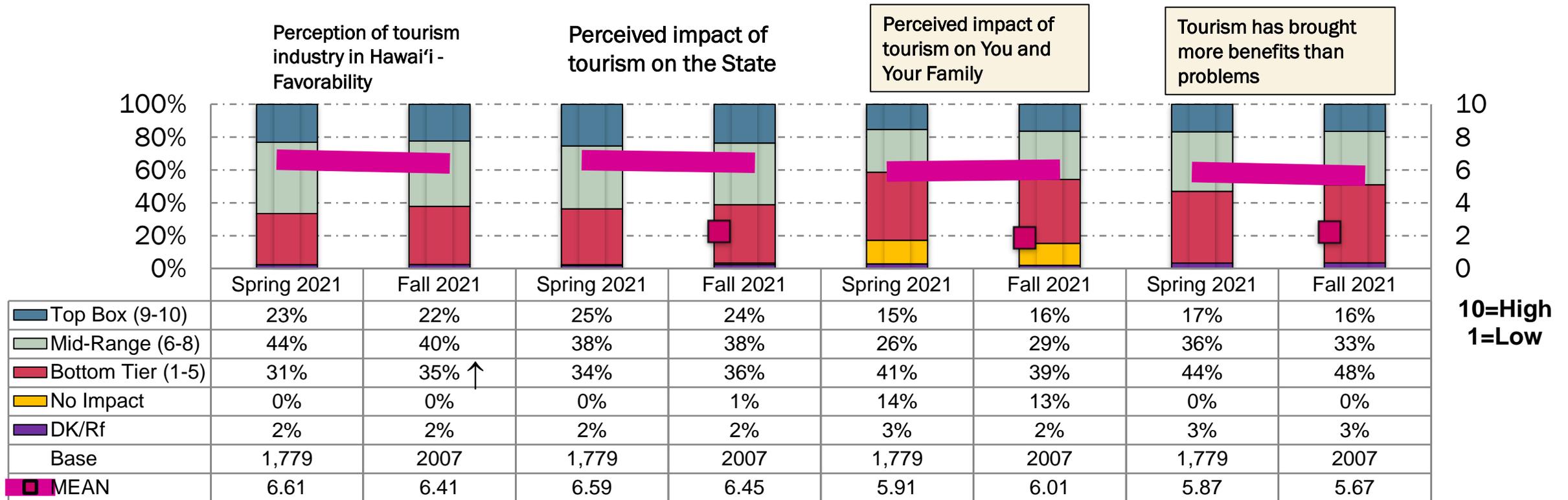
4 *Moreover, while opinions of the Hawai’i Tourism Authority have focused on Marketing, resident awareness of the agency is shifting towards the Authority’s role in better Managing Tourism (i.e., communicating with residents, balancing resident/visitor needs).*



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

High level indicators of resident sentiment continued to weaken in Fall 2021, although the decreases were largely not significant, compared to Spring 2021. Notably, this diminished perception of the industry continues to be driven by directional reductions in enthusiastic supporters or Top Box (9-10) advocates and hardening support among detractors of the industry. On the other hand, the number of residents that say the industry has a positive impact on their families, ticked upwards during this time.



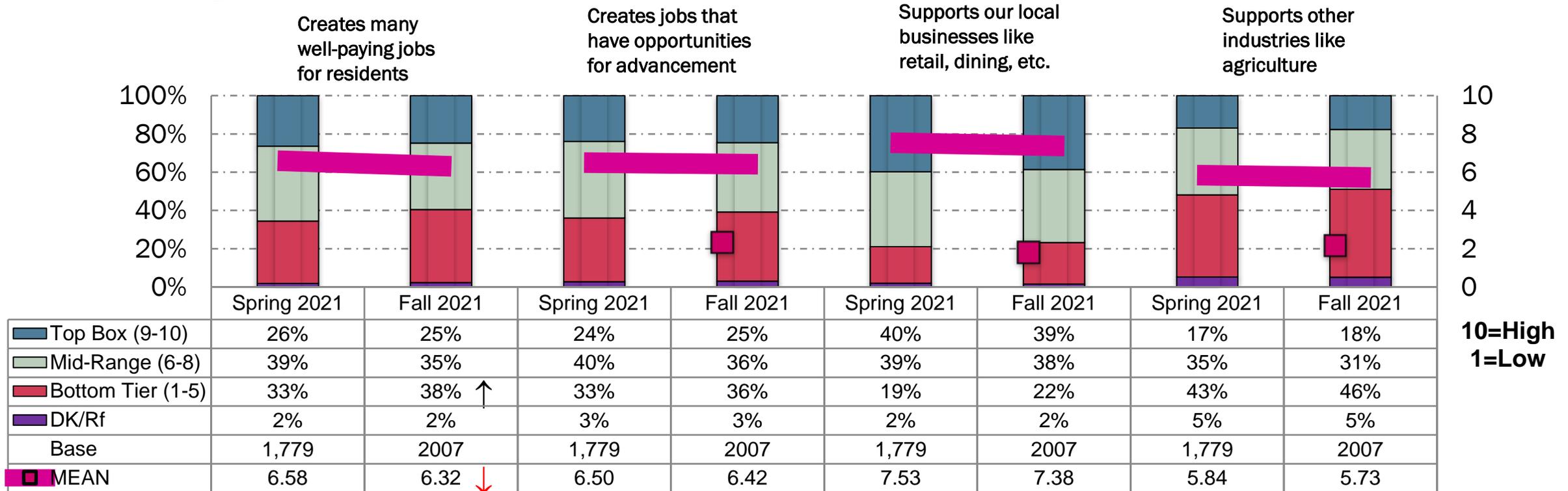
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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 – Economic Impact Indicators

Regarding the impact to Hawai'i's economy, public perceptions of the visitor industry's ability to create well-paying jobs or jobs with career advancement have weakened. Although agreement that the industry supports local businesses remained slightly higher than other economic indicators overall, here to, perceptions dampened as Hawai'i residents voiced slightly lower confidence in the industry's positive impact on the economy. Public perception that the visitor industry helps support agriculture and other industries also eased directionally, relative to Spring 2021.

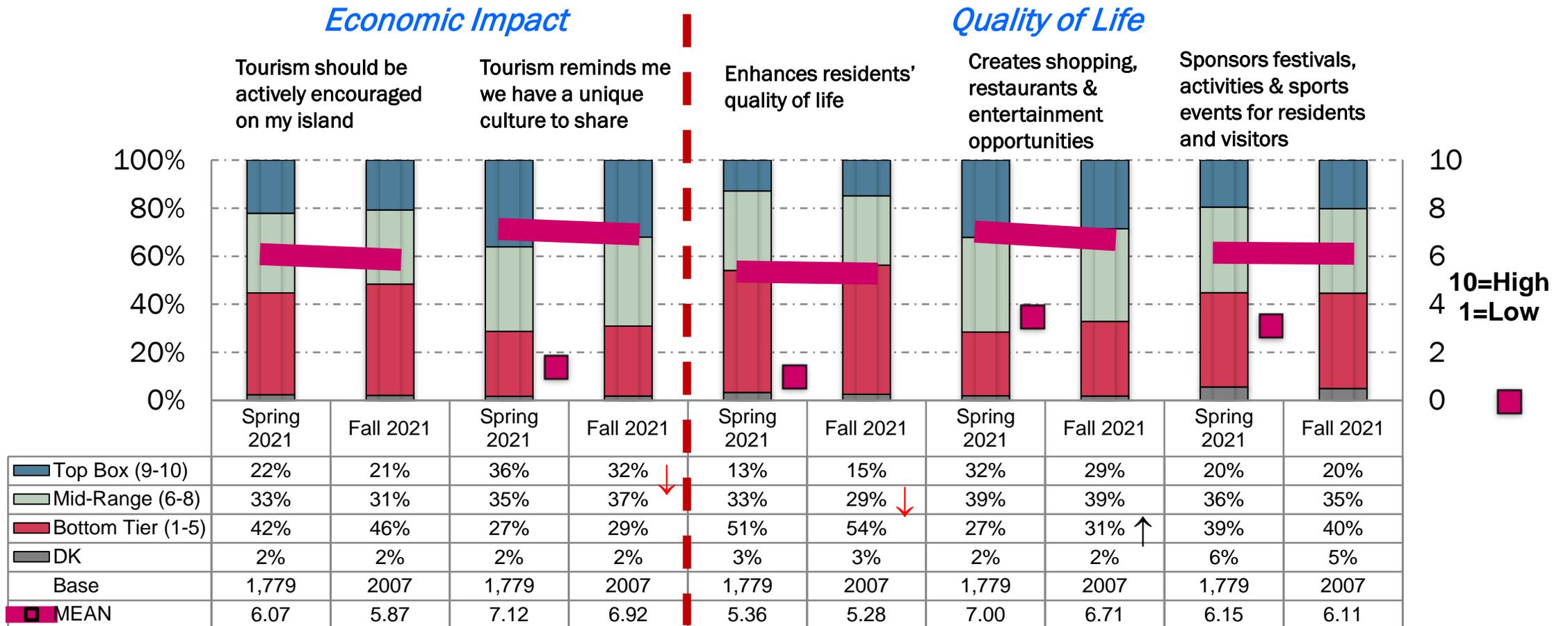


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Executive Summary – Economic Impact (continued)/Quality of Life

The weakened perception of the industry’s economic benefits continued with lower ratings on encouraging tourism on each island and reminding residents that they have a unique culture to share.

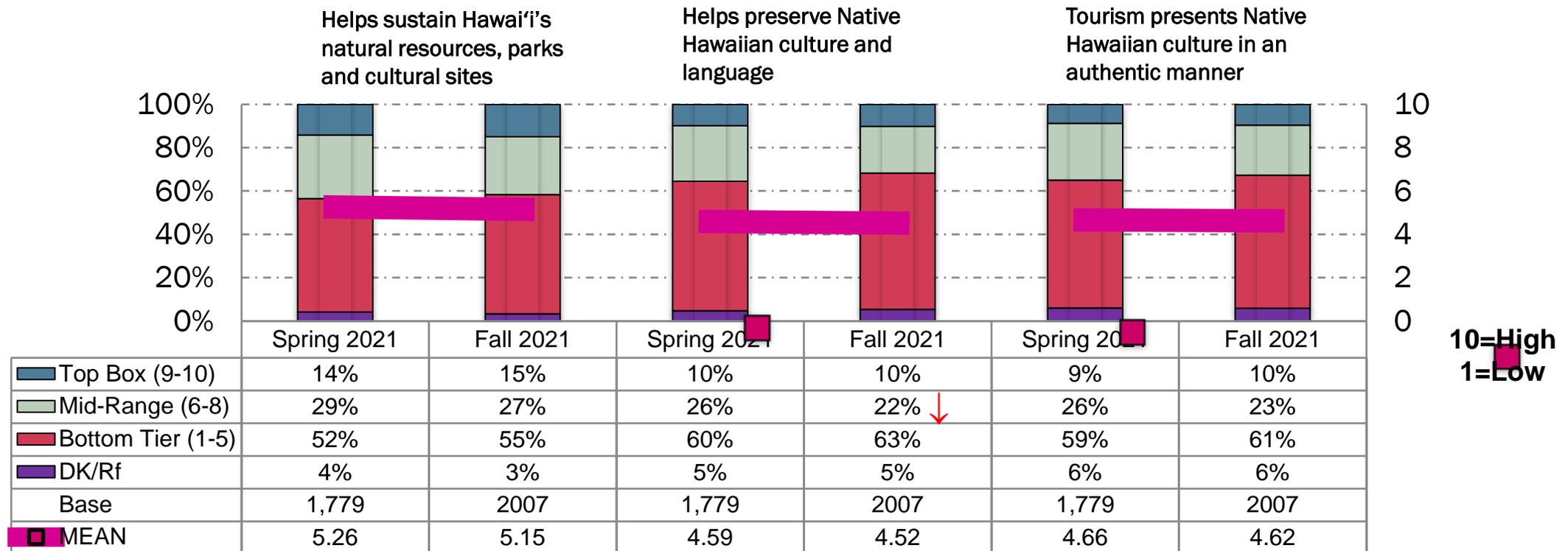
Furthermore, among the industry’s impact on Quality of Life metrics, residents are less in agreement that the industry has a positive impact on their overall quality of life, shopping/restaurant/entertainment opportunities and sponsorship of festivals/events.



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Executive Summary – Natural Resources and Cultural Sustainability Indicators

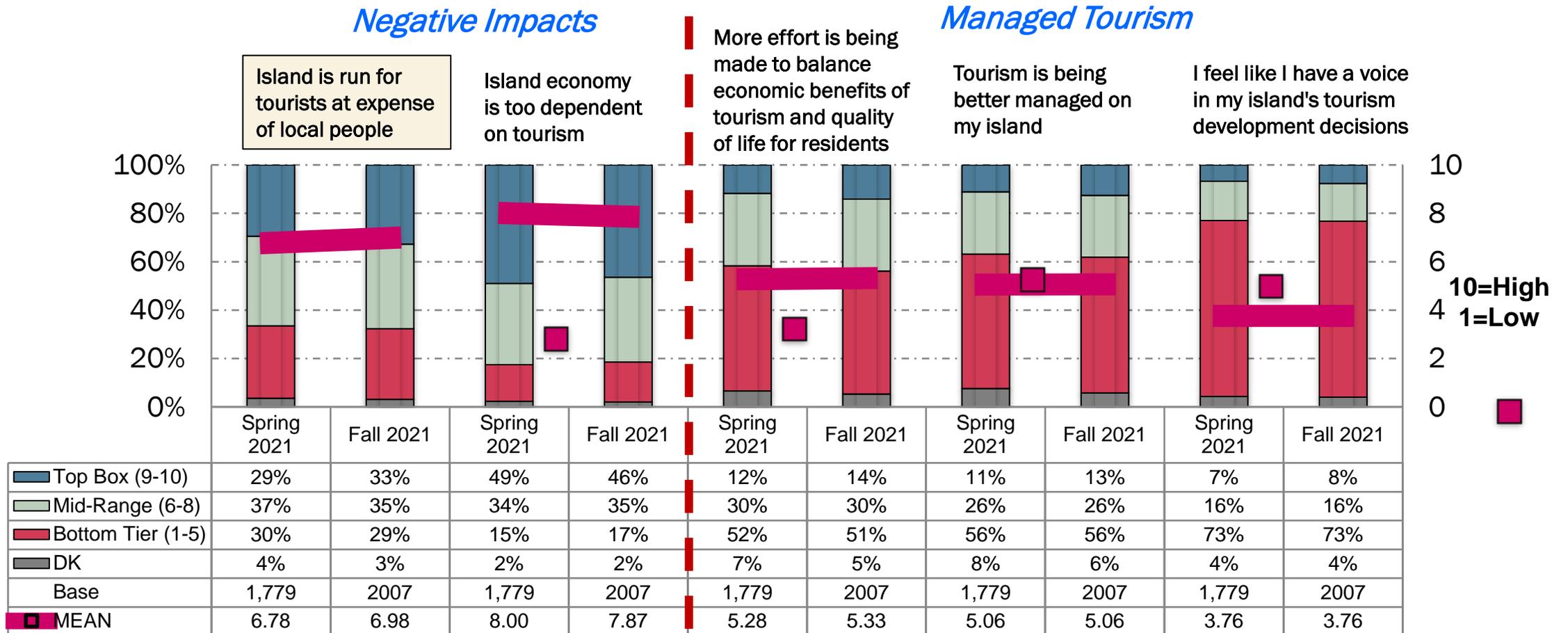
Despite nearly two years with lower visitor arrivals, residents continue to voice lower levels of agreement that the industry supports natural resources, Native Hawaiian culture, or trust that Hawaiian culture is presented authentically. These weakened attitudes are echoed in that top perceived problems created by tourism, including: Damage to the environment and a lack of respect for the land and Hawaiian culture.



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 – Balance: Negative Impacts/Managed Tourism

Mixed signals are observed in resident perceptions of the negative impacts of tourism. Relative to Spring 2021, perceptions that the islands are run for tourists at the expense of locals have increased, while perceptions of tourism dependency have tapered. Neither of these changes are significant. On a positive note, resident perceptions regarding managed tourism have held steady or improved slightly – a potential early indicator of residents’ awareness of fledgling tourism management efforts.



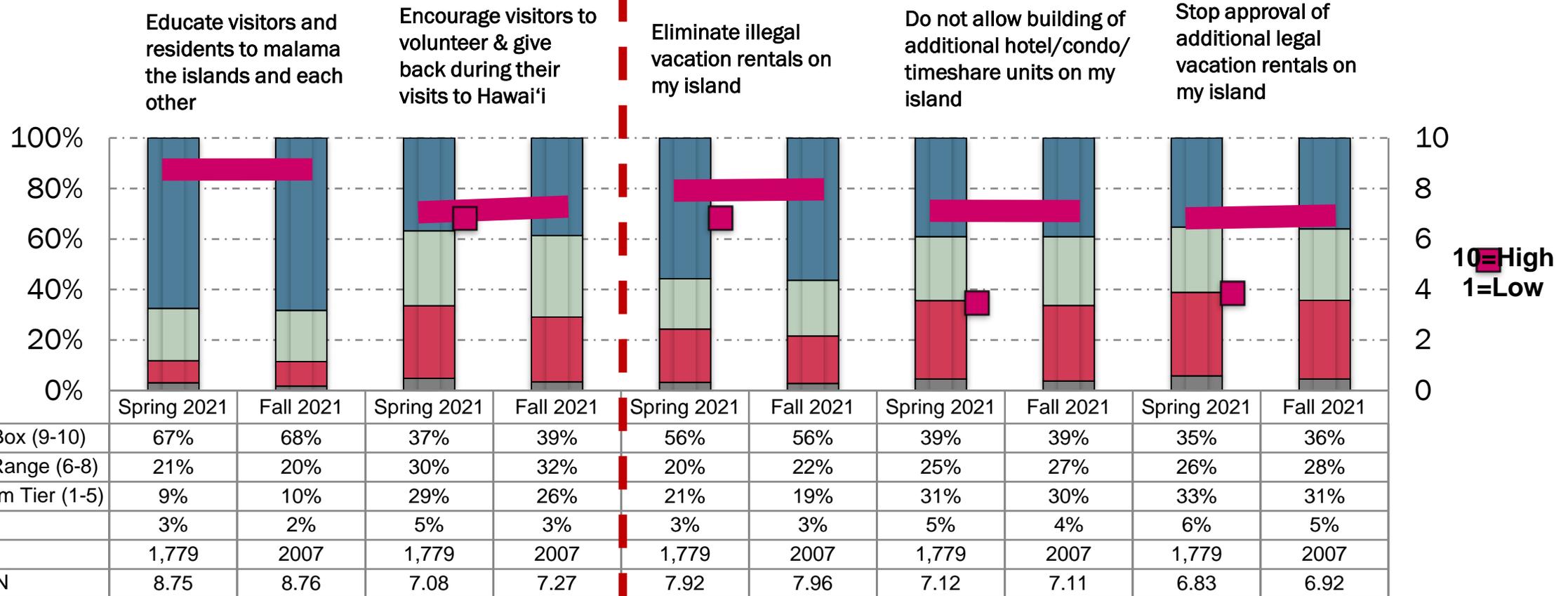
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary - Importance of Select Managed Tourism Strategies

Managed tourism strategies offer a solution to some of the perceived negative effects of the industry. Public support for areas in Regeneration (educating/encouraging visitors) and improving Accommodation strategies (better management of rentals, accommodations) remain strong or improved in Fall 2021.

Regenerative

Accommodations

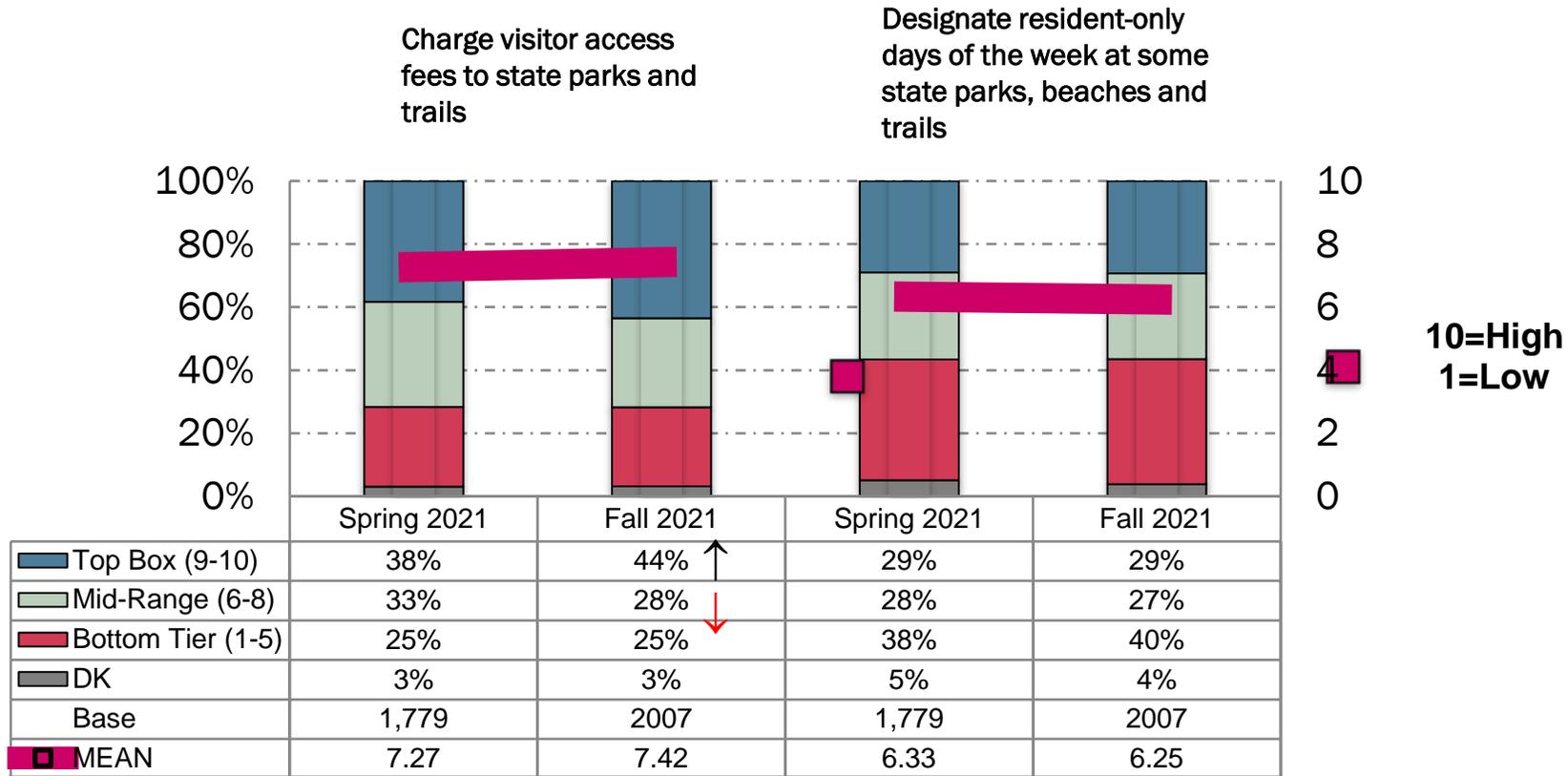


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

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

Charging visitors fees to access State parks and trails gained momentum as a strategy to better manage the industry. Visitor fees, along with eliminating illegal vacation rentals, have the strongest public support as strategies for better tourism management.

Access

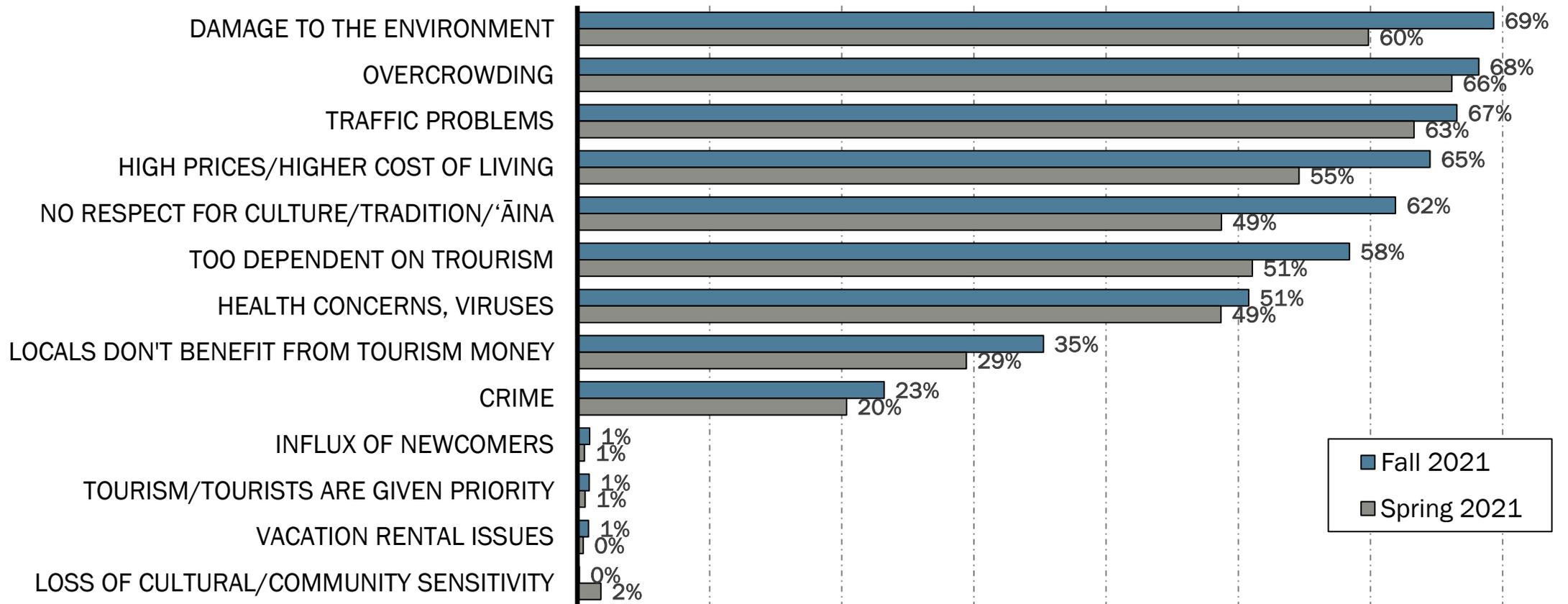


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Executive Summary – Problems Created by Tourism in Hawai‘i

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

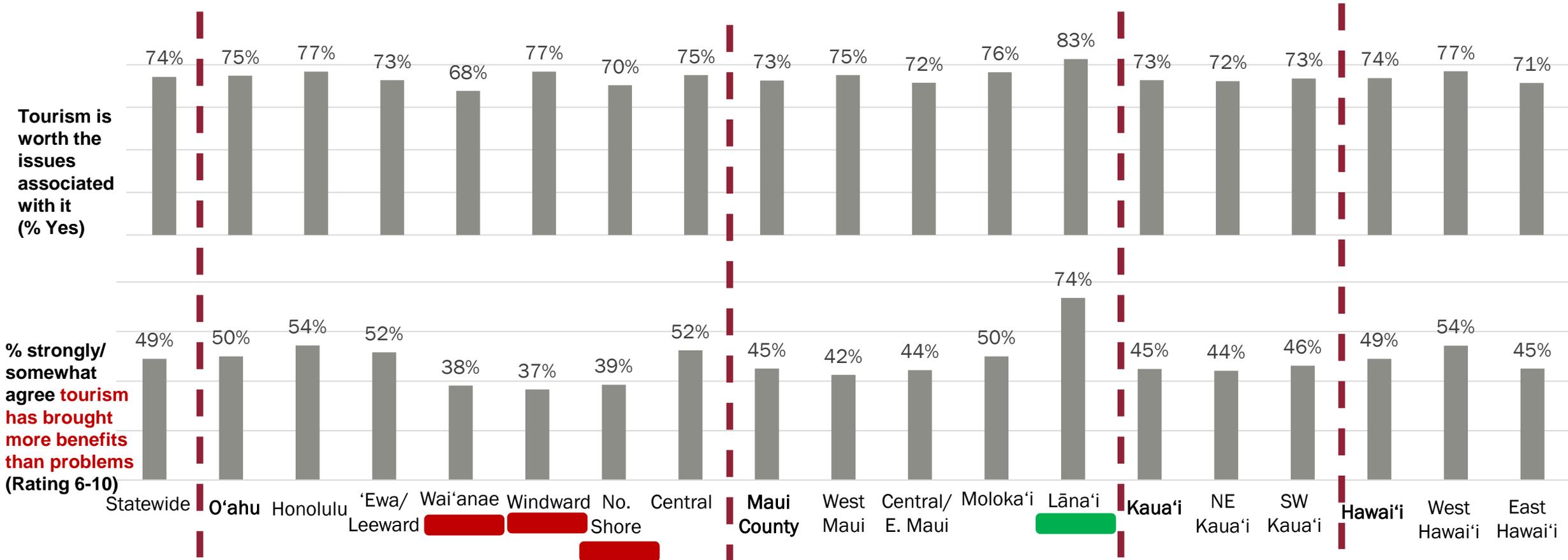
Damage to the environment rose to become the top problem associated with the visitor industry, though **Overcrowding** and **Traffic** continued to rank among residents’ top concerns. These issues were followed closely by concerns over **Higher prices/costs, a lack of respect for the land and Hawaiian culture, an over dependence on the industry and Health concerns**. All issues were mentioned by a majority of those who say tourism creates more problems than benefits.



Base: Spring 2021 (808), Fall 2021 (973)
 Q5a. In your opinion, what problems do you think tourism has created in Hawai‘i?

Executive Summary – Tourism worth the issues/Benefits outweigh Problems by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on the islands of O’ahu – Wai’anae Windward, and North Shore; they were less so on Lāna’i.

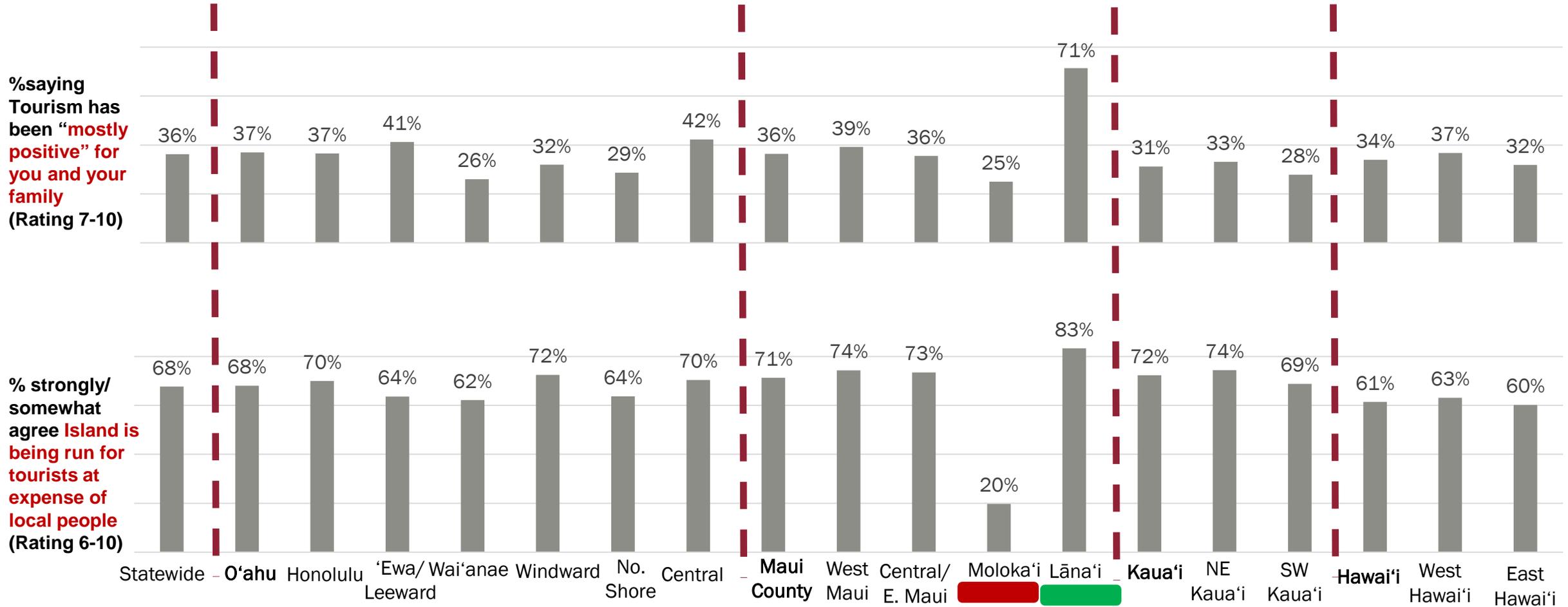


Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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 – Resident Sentiment by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on **Moloka'i** and notably less so on **Lāna'i**. Only 25 percent of Moloka'i residents say the industry is 'mostly positive' for themselves and their 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.

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?

Executive Summary - Hawai'i Tourism Authority Roles & Ratings (1)

(i.e., satisfaction measured among residents aware that HTA is responsible for each area)

While the Hawai'i Tourism Authority first and foremost is known for its Marketing and tourism Leadership roles, residents have increasingly become aware of HTA's roles in Sustainable Tourism, Cultural Preservation and Communicating with Residents. However, mean ratings on these "new" areas of HTA responsibility remain flat with Spring 2021 levels, setting the stage for advancements in these areas.

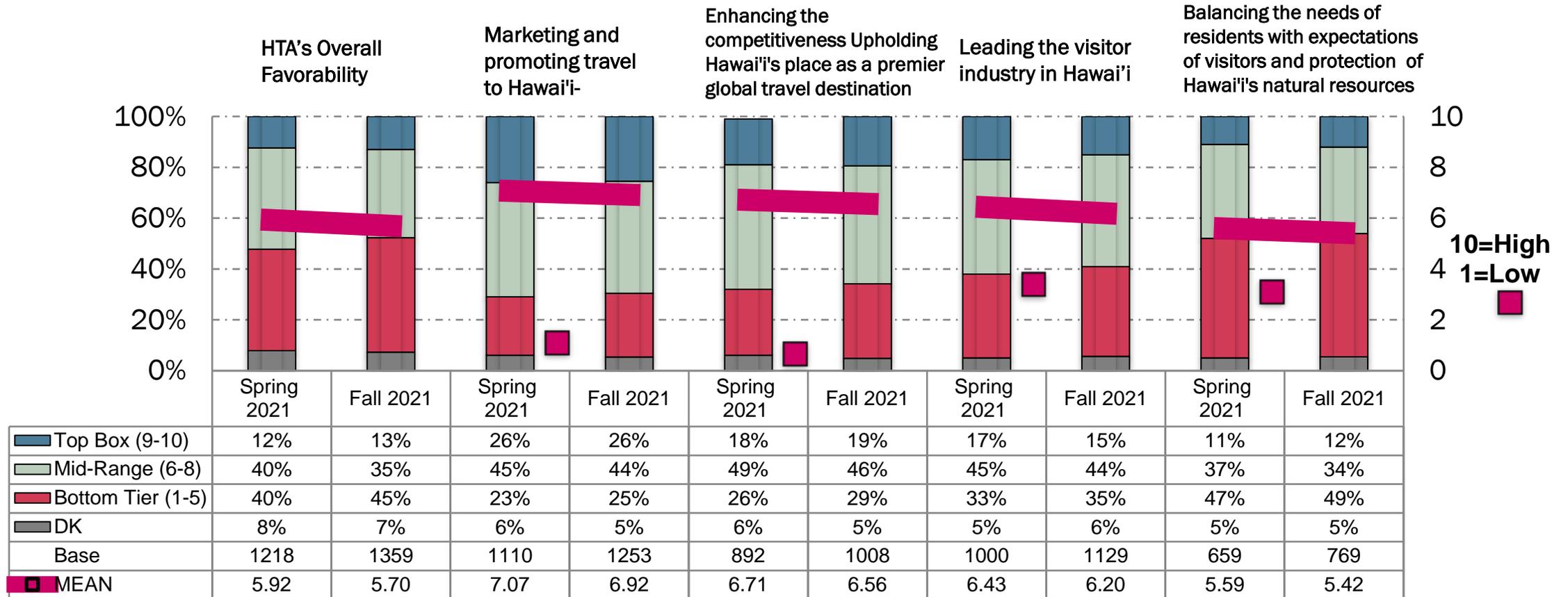


Q9a. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for?

Q9b. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority is doing an Excellent job and 1 means you think the Hawai'i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?

Executive Summary – Hawai'i Tourism Authority Perceptions (2)

Among residents' familiar with HTA's role in the industry, perceptions dimmed slightly with the public forming a neutral to slightly positive opinion of the agency. State residents continue to rate HTA the highest when it comes to the Authority's role in Marketing and promoting Hawai'i.

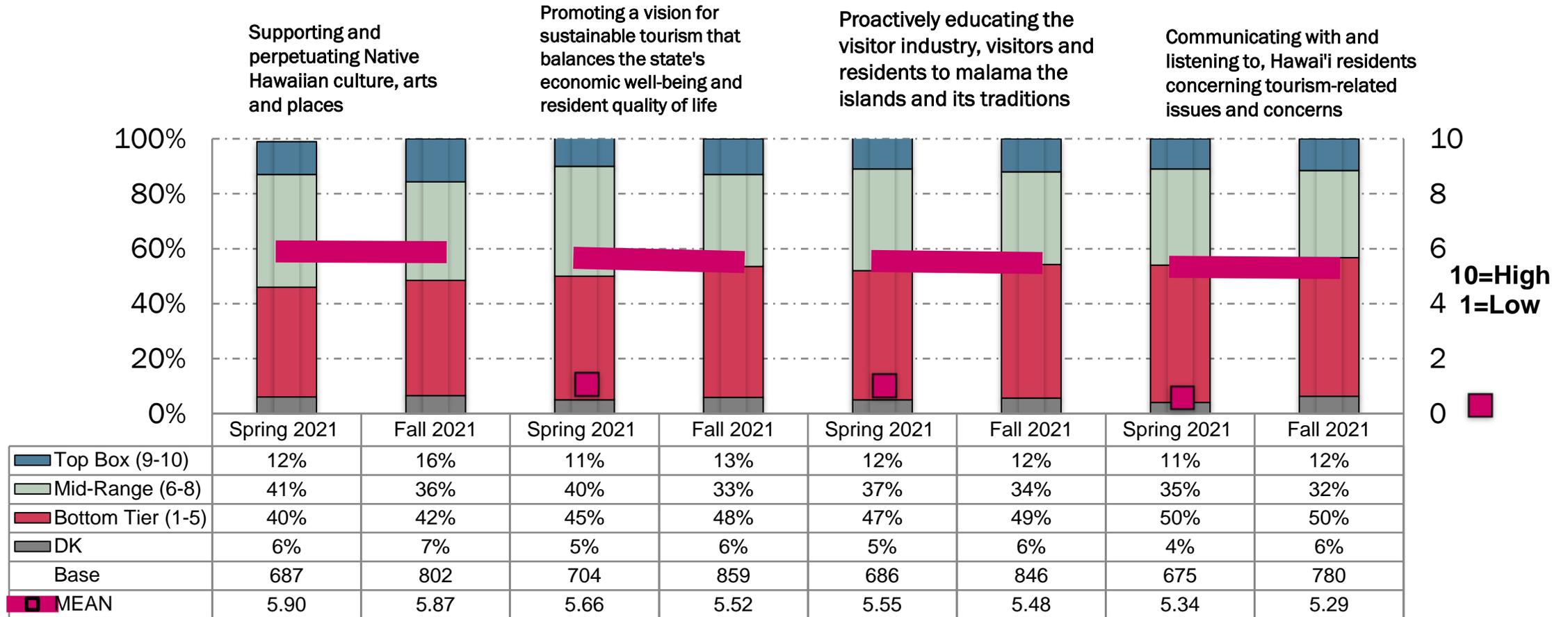


Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

Executive Summary – Hawai'i Tourism Authority Perceptions (3)

Public ratings of HTA's work in cultural preservation, sustainability, education and resident communications tapered slightly in Fall 2021, compared to Spring 2021.

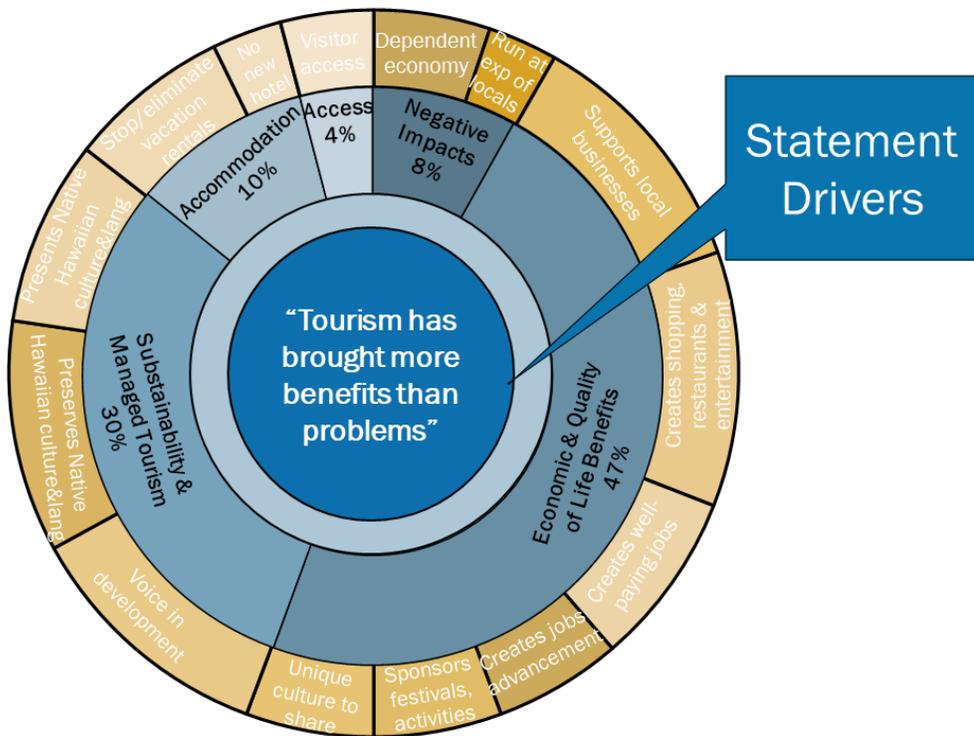


Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

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:

- Supports local businesses: 11%
- Creates shopping, restaurants and entertainment opportunities for residents: 11%
- Have a voice in my island's tourism development: 11%
- Helps to preserve Native Hawaiian culture and language: 9%
- Creates many well-paying jobs for residents: 8%



Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits (47%) Spring '21 56% Fall '20 35% Spring '20 42% Fall '17: 40% Spring '17: 47%	Supports local businesses	11%
	Creates shopping, restaurants and entertainment opportunities for residents	11%
	Creates many well-paying jobs for residents	8%
	Creates jobs that have opportunities for advancement	6%
	Sponsors festivals, activities & sports events for residents & visitors	6%
	Tourism in Hawai'i reminds me that we have a unique culture to share with visitors	5%
	Should be actively encouraged on my island	0%
	Supports other industries like agriculture	0%
	Is an industry that enhances residents' quality of life	0%
	Sustainability & Managed Tourism (30%) Spring '21 23%	I feel like I have a voice in my island's tourism development decisions
Helps to preserve Native Hawaiian culture and language		9%
Presents Native Hawaiian language and culture in an authentic manner		7%
I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents		2%
Helps sustain Hawai'i's natural resources, parks and cultural sites		1%
I feel like tourism is being better managed on my island		0%
Accommodation (10%) Spring '21 2%	Stop approval of additional legal vacation rentals	4%
	Eliminate illegal vacation rentals	3%
	Do not allow building of additional hotel/condo/timeshare units	3%
Negative Impacts (8%) Spring '21 11% Fall '20 15% Spring '20 16% Fall '17: 20% Spring '17: 24%	My island's economy is too dependent on tourism	5%
	This island is being run for tourists at the expense of local people	3%
Access (4%) Spring '21 8%	Designate resident-only days of the week at some state parks, beaches and trails	2%
	Charge visitor access fees to state parks and trails	2%
Education (1%)	Educate visitors and residents to malama the islands and each other	1%
Giving Back (0%) Spring '21 0%	Encourage visitors to volunteer and give back during their visits to Hawaii	0%

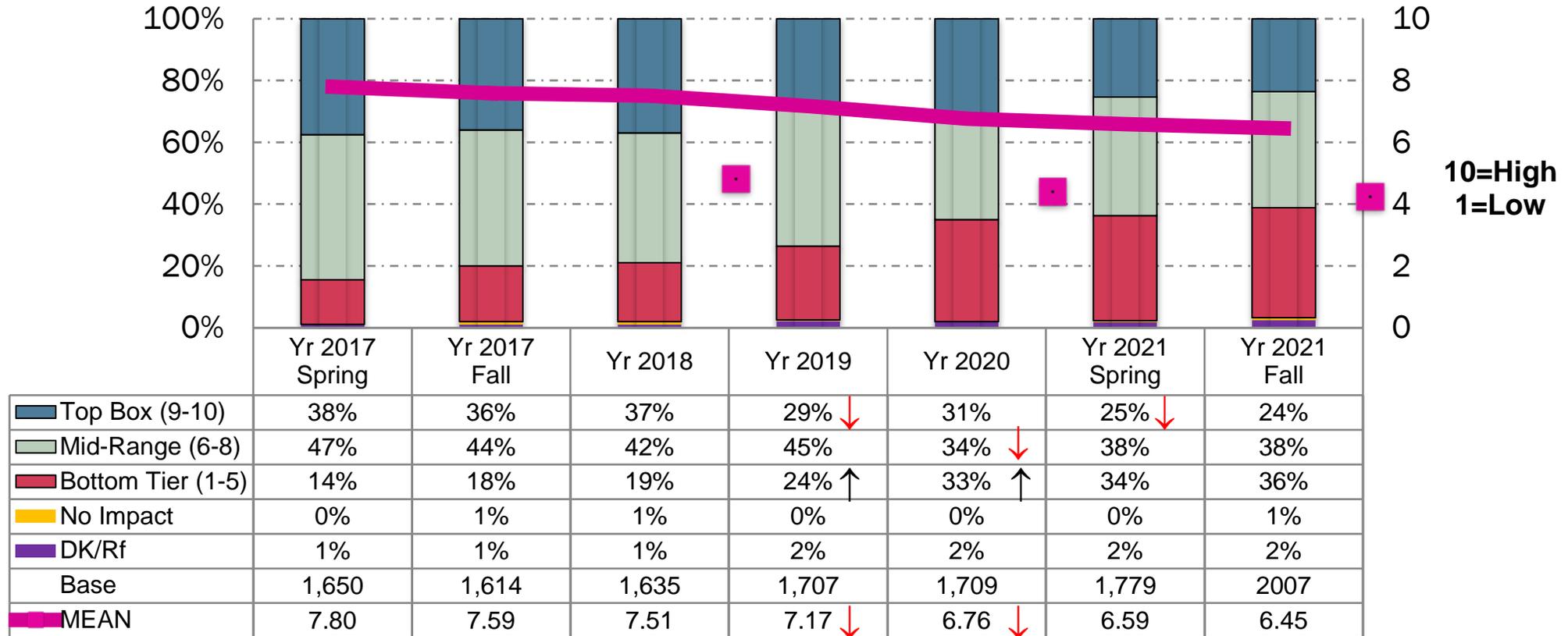


Detailed Findings



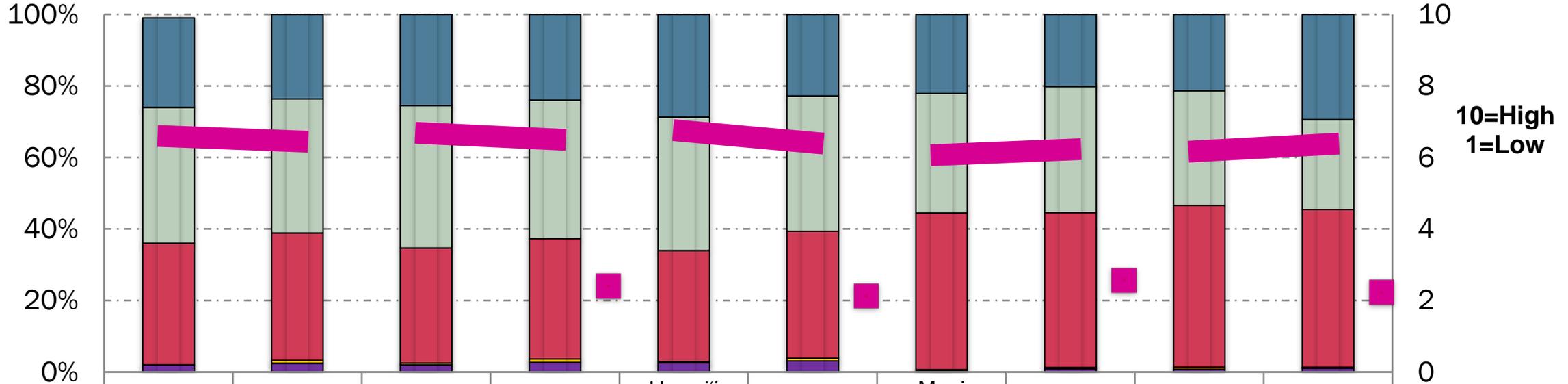
Impact of the Visitor Industry

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?

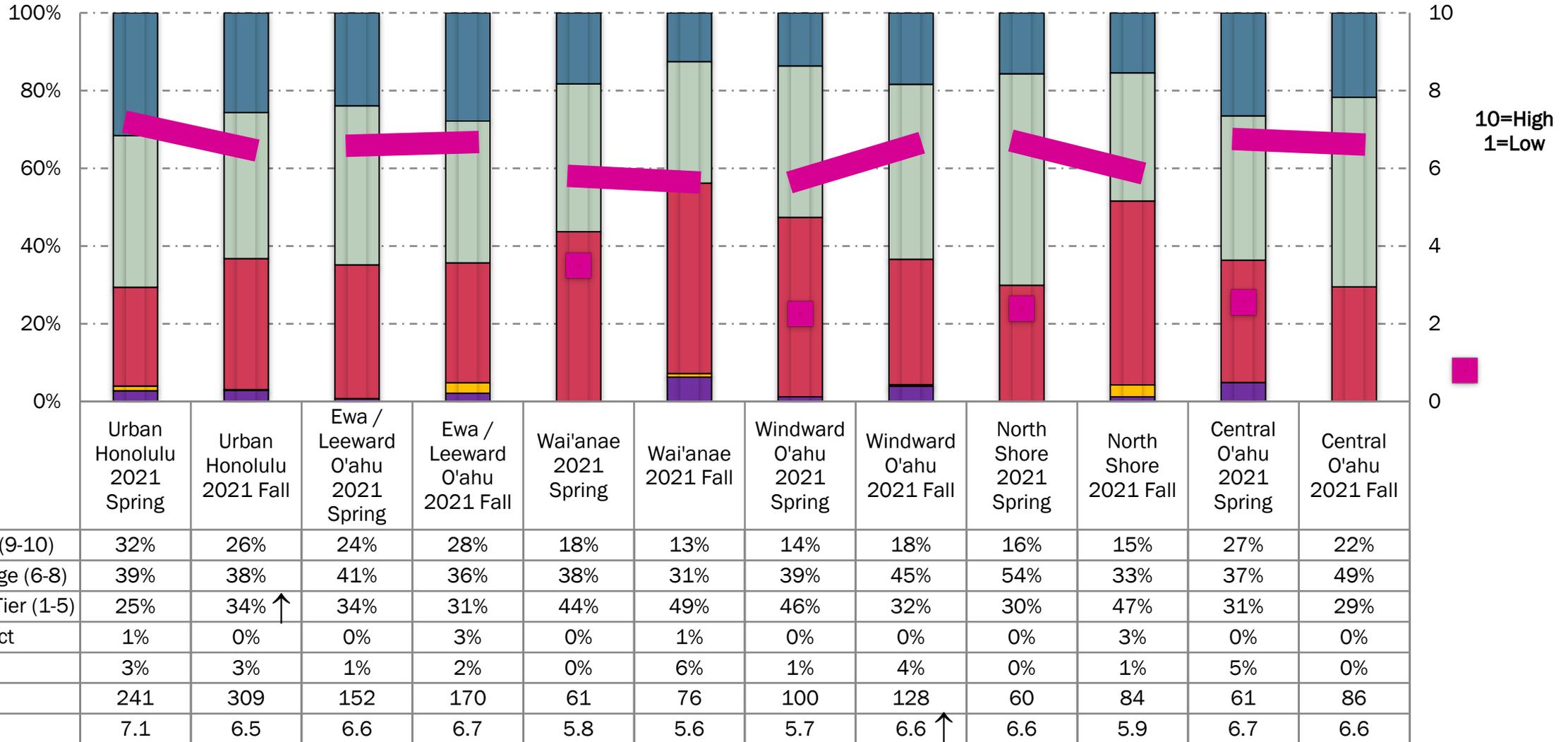
Impact of Tourism on the State – *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
Top Box (9-10)	25%	24%	26%	24%	29%	23%	22%	20%	21%	29%
Mid-Range (6-8)	38%	38%	40%	39%	37%	38%	33%	35%	32%	25%
Bottom Tier (1-5)	34%	36%	32%	34%	31%	35%	44%	43%	45%	44%
No Impact	0%	1%	0%	1%	0%	1%	0%	0%	1%	0%
DK/Rf	2%	2%	2%	3%	3%	3%	0%	1%	1%	1%
Base	1779	2007	675	853	451	458	376	419	277	277
MEAN	6.59	6.45	6.68	6.51	6.74	6.42	6.08	6.22	6.18	6.37

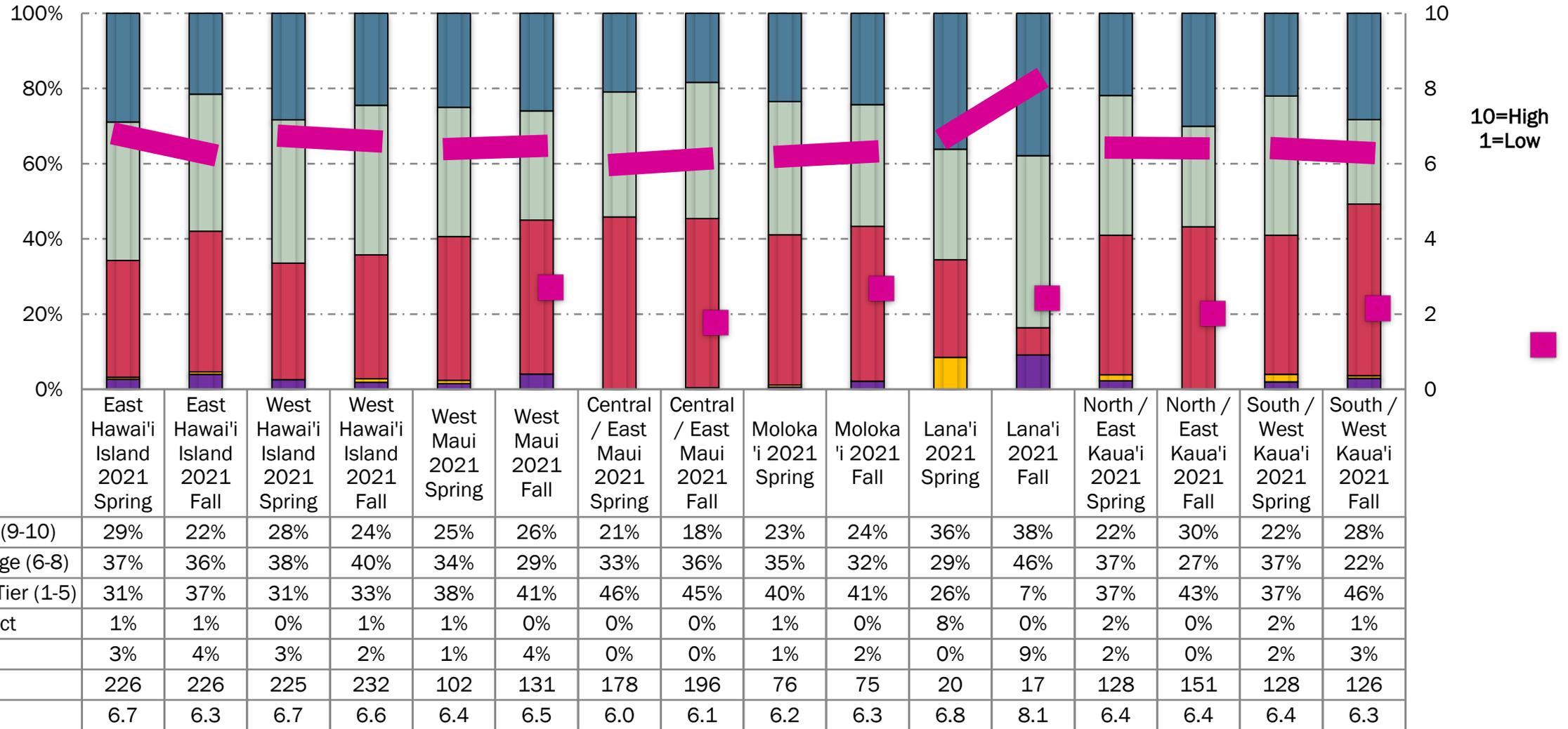
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



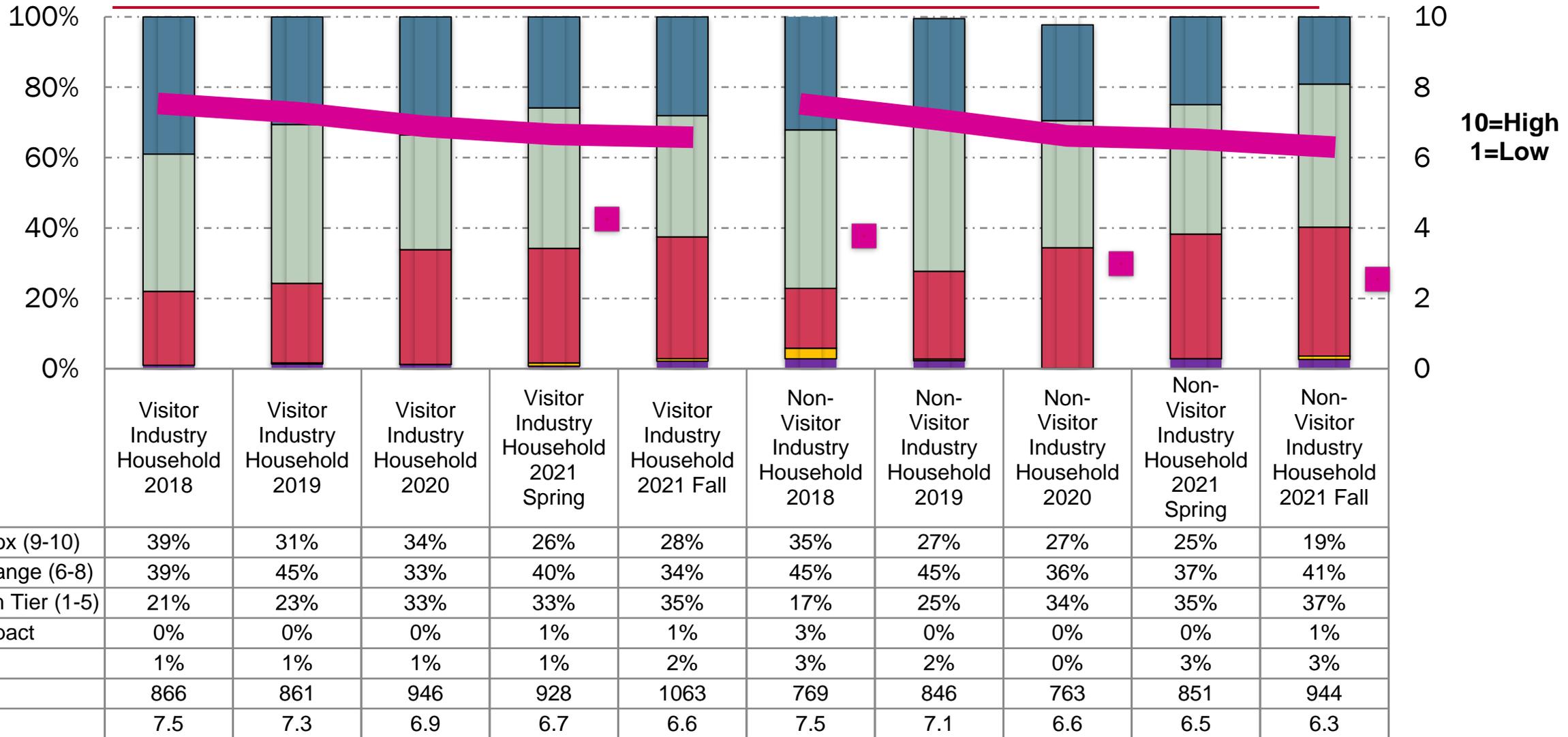
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



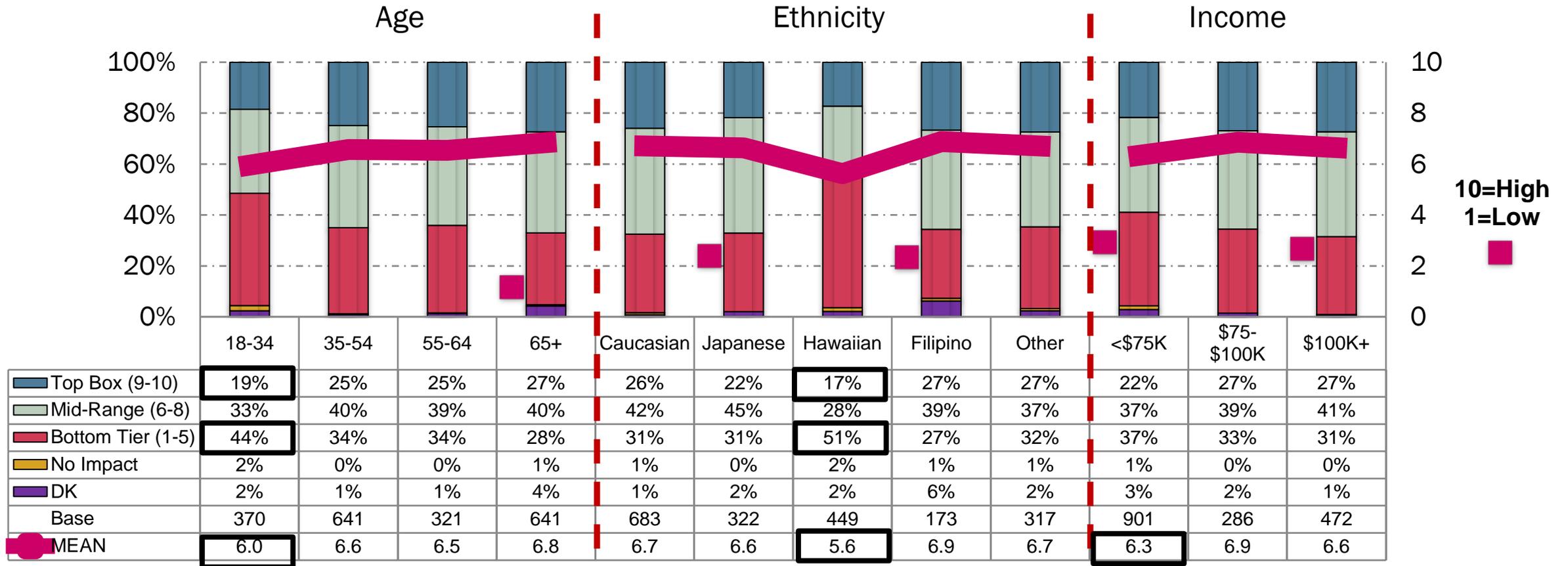
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

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



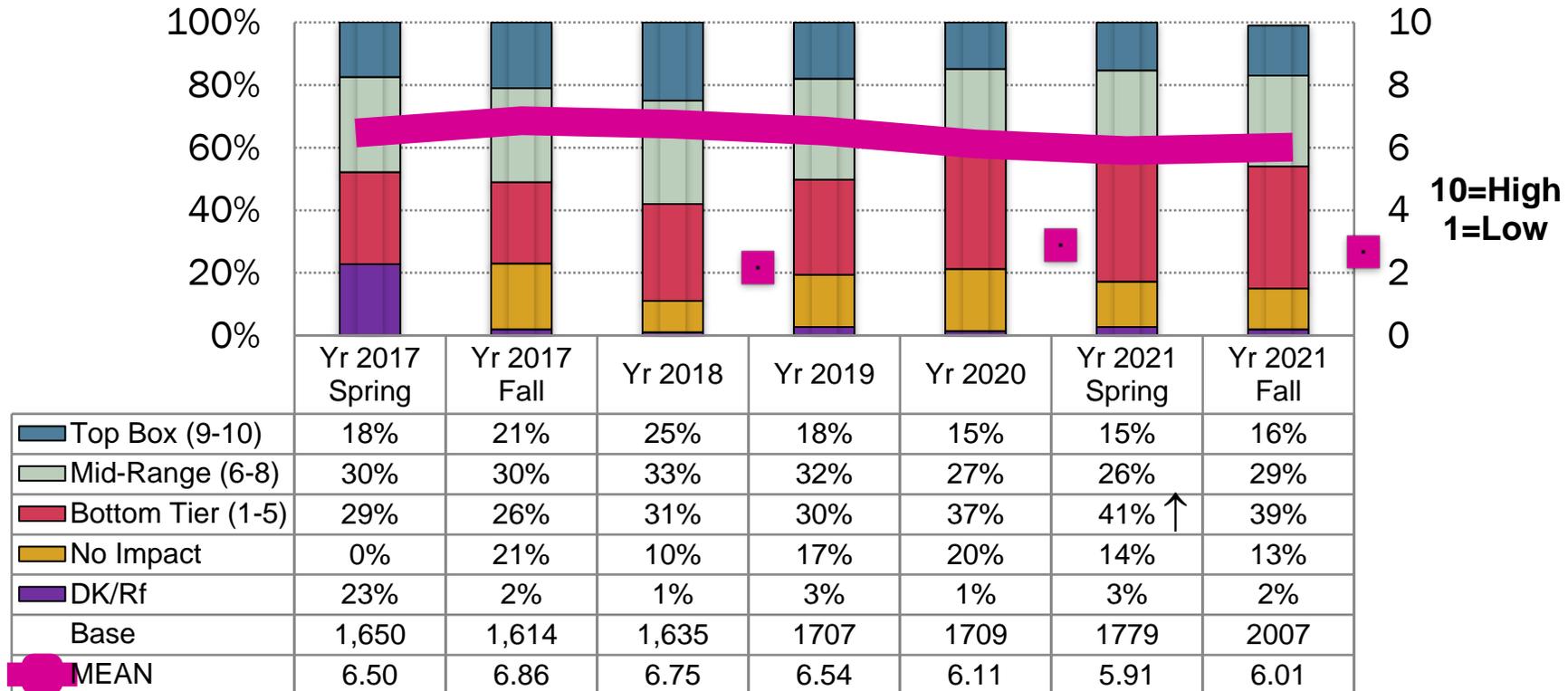
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



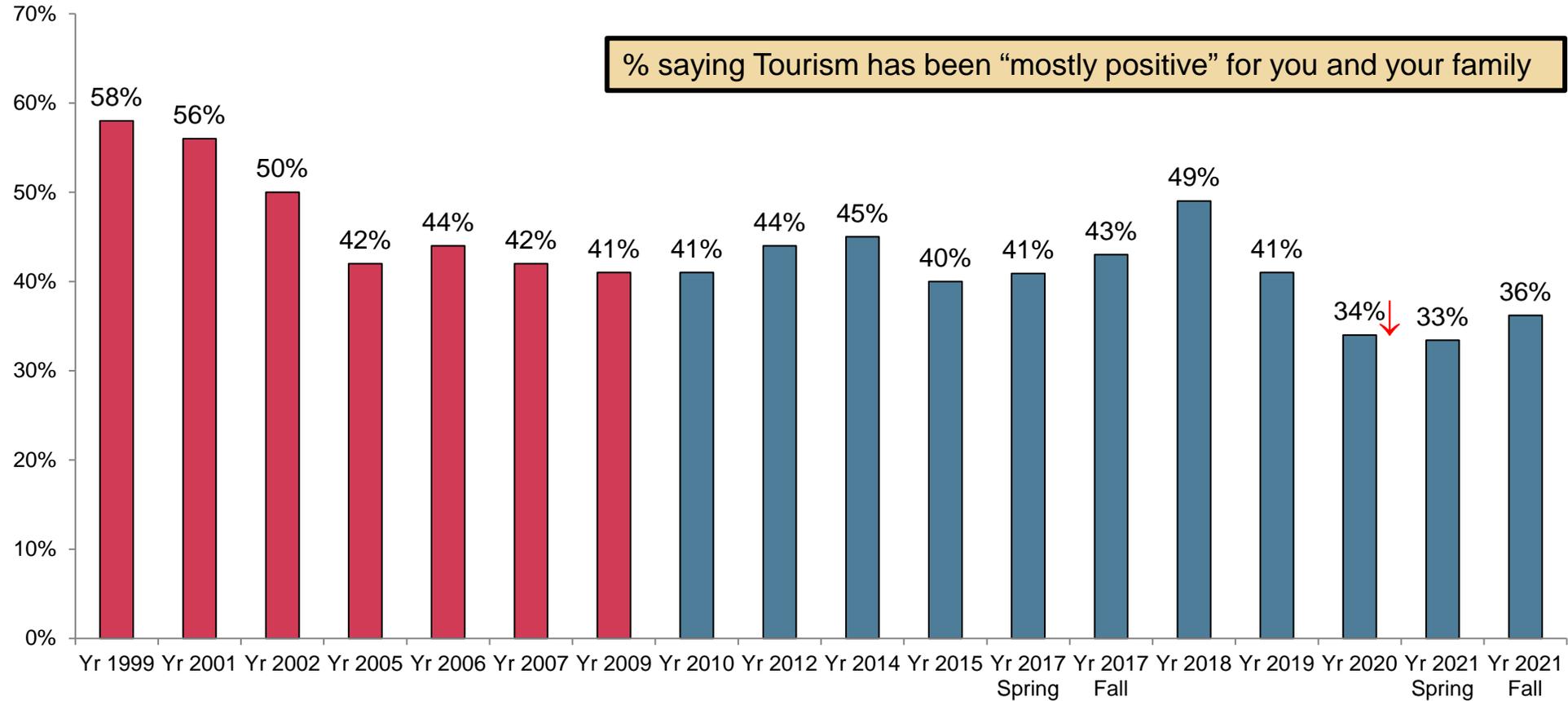
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...the state as a whole? If tourism has no impact, please just tell me.

Impact of Tourism on You & Your Family - *Overall*



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?

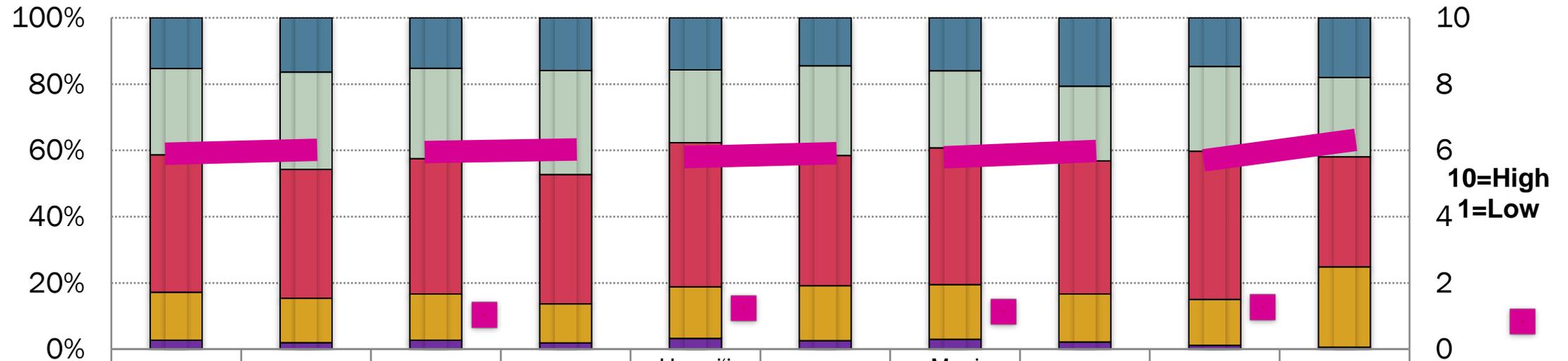
Impact of Tourism on You & Your Family – *Overall Cont.*



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?

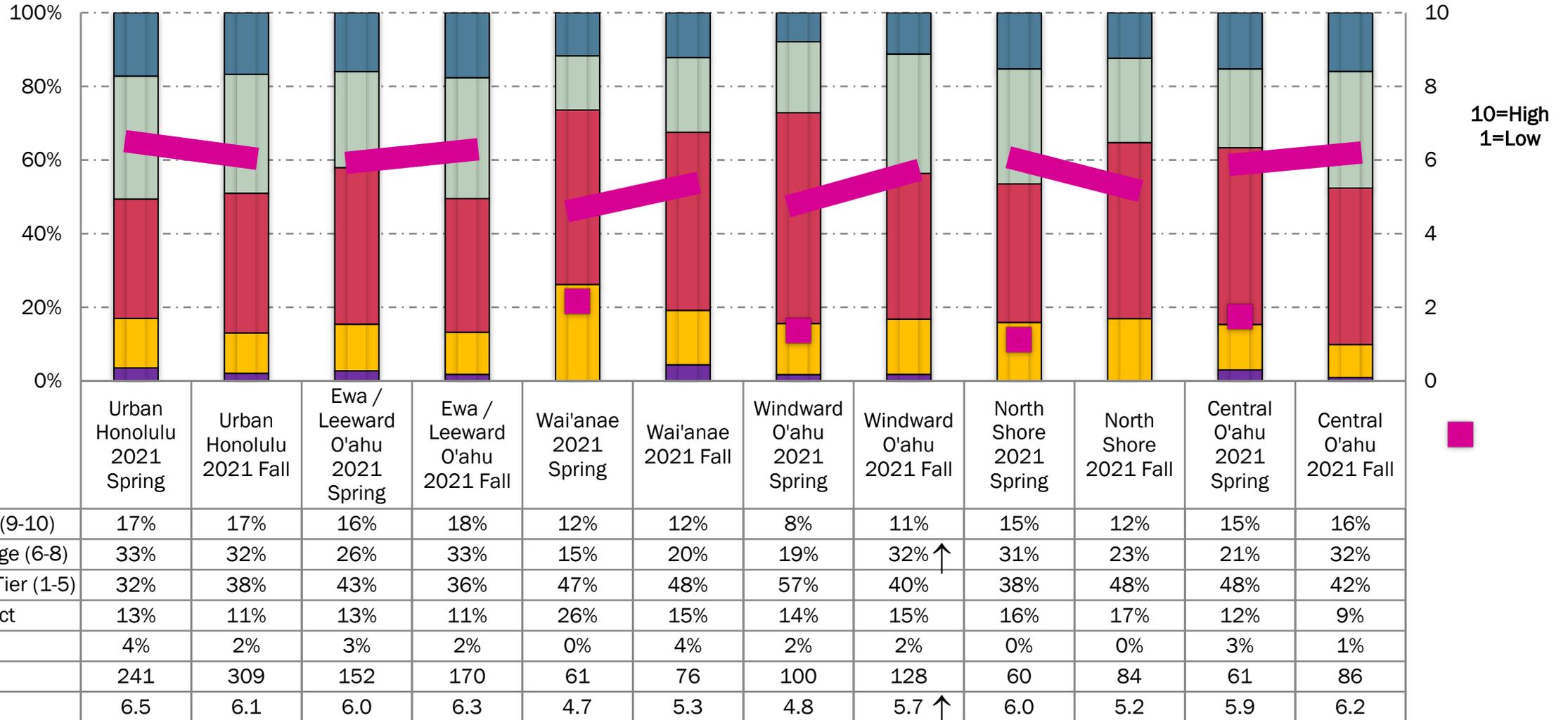
Impact of Tourism on You & Your Family - *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
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Mid-Range (6-8)	26%	29%	27%	31%	22%	27%	23%	22%	26%	24%
Bottom Tier (1-5)	41%	39%	41%	39%	43%	39%	41%	40%	45%	33% ↓
No Impact	14%	13%	14%	12%	16%	17%	16%	15%	14%	24% ↑
DK/Rf	3%	2%	3%	2%	3%	3%	3%	2%	1%	1%
Base	1779	2007	675	853	451	458	376	419	277	277
MEAN	5.91	6.01	5.96	6.02	5.81	5.91	5.81	5.97	5.74	6.27

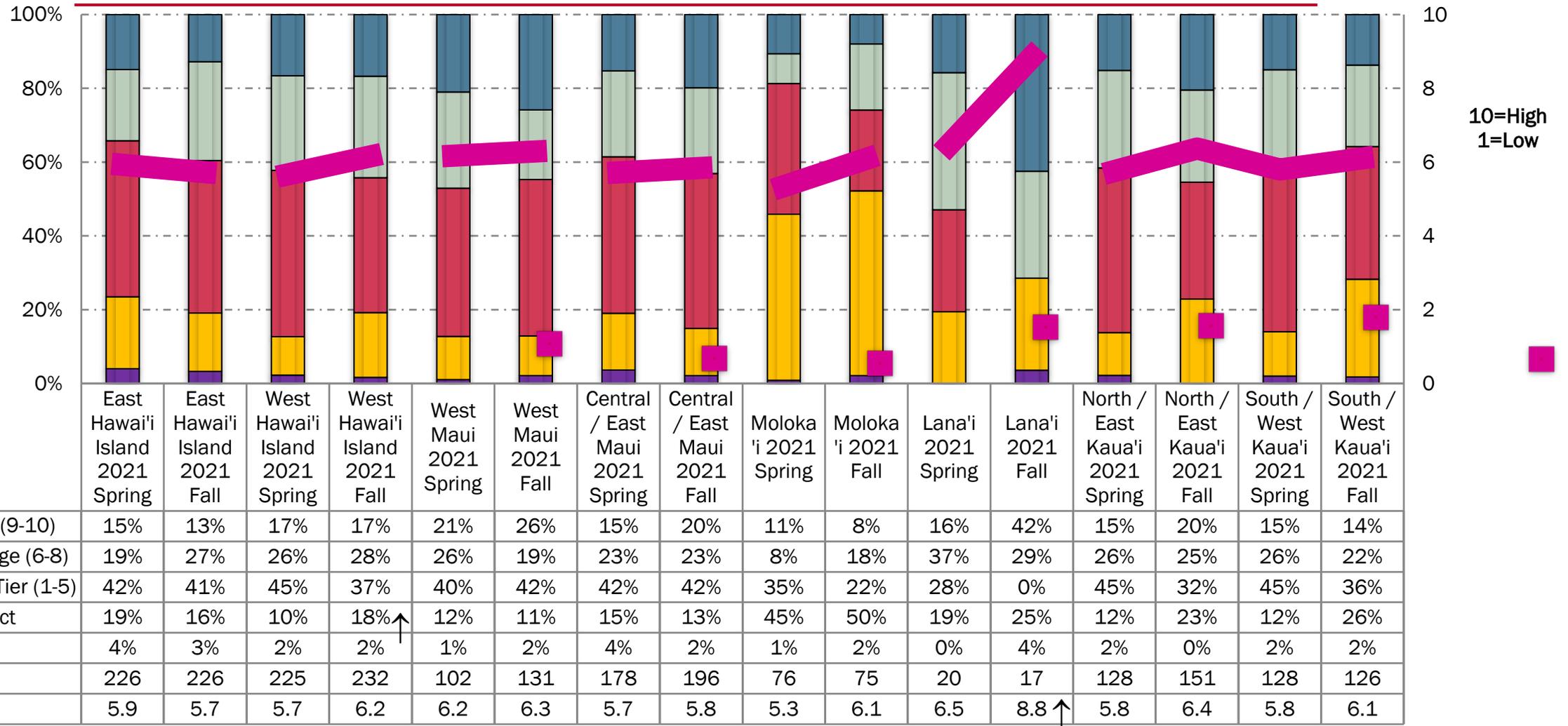
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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 (Hawai'i Island, Maui, & Kaua'i)*



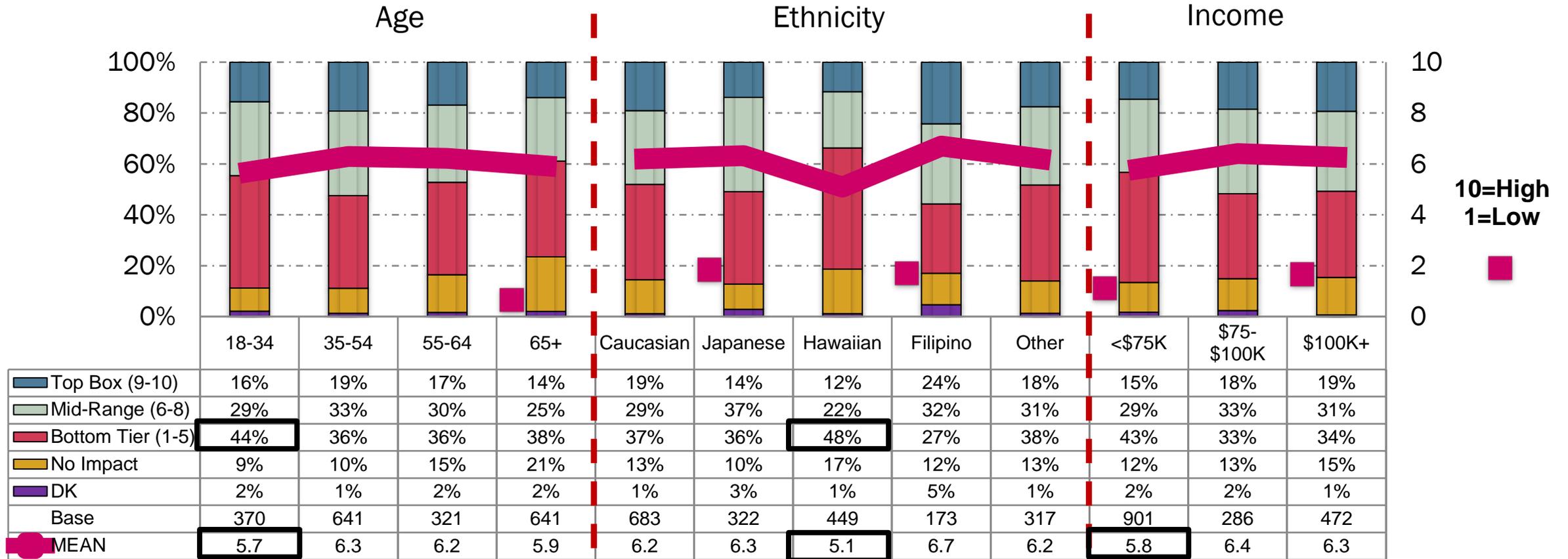
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

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



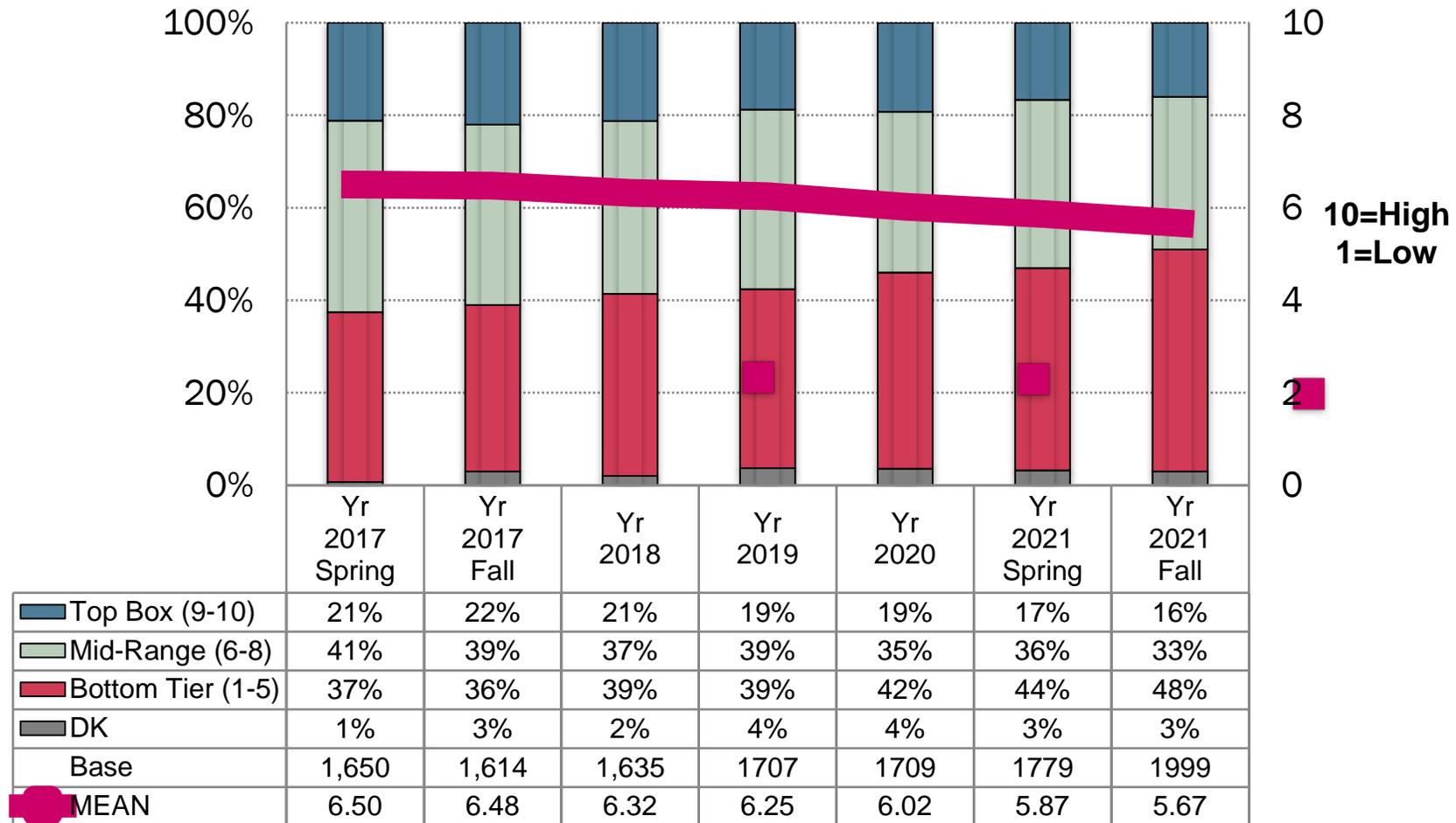
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



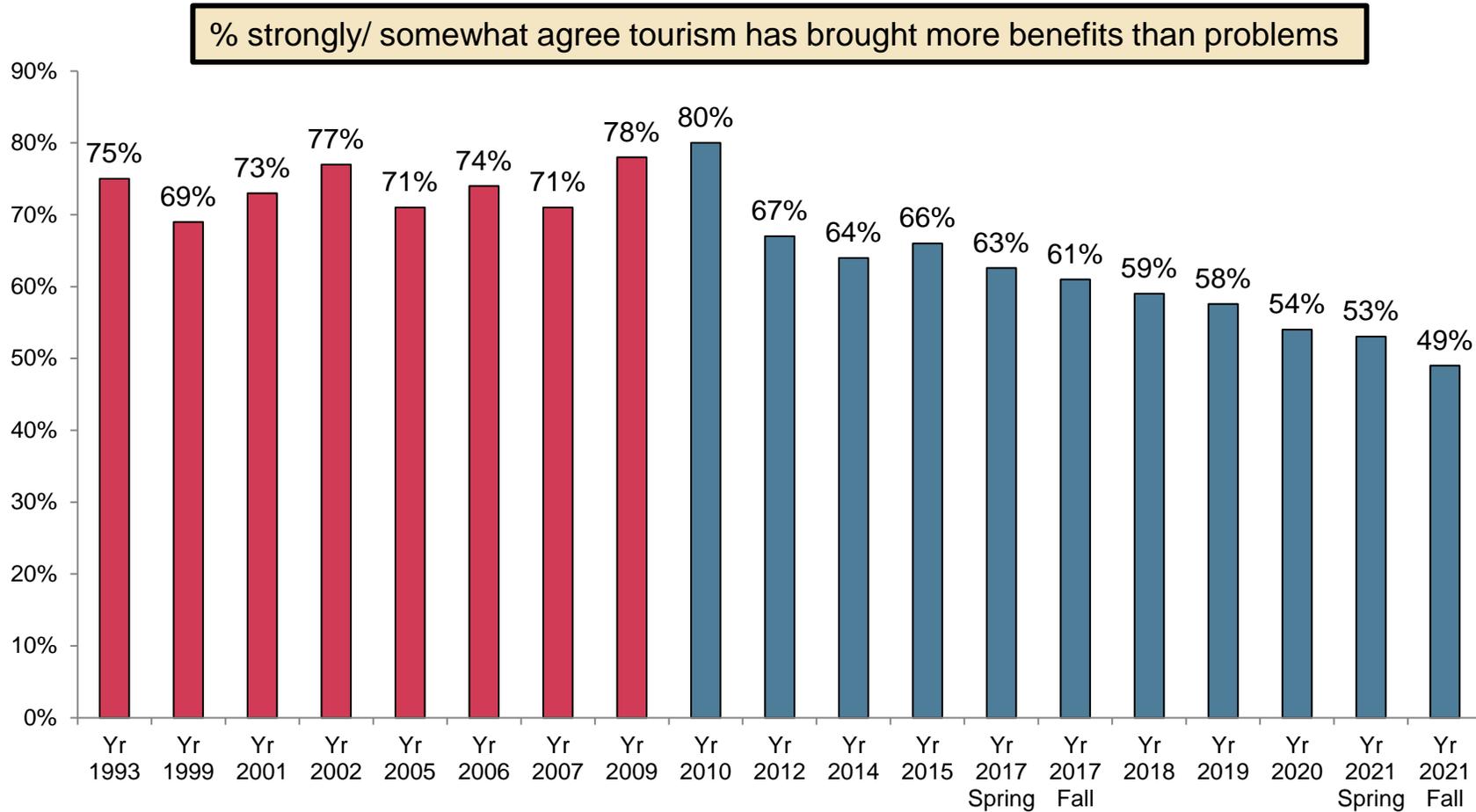
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...you and your family? If tourism has no impact, please just tell me.

“Tourism has brought more benefits than problems” - *Overall*



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...?

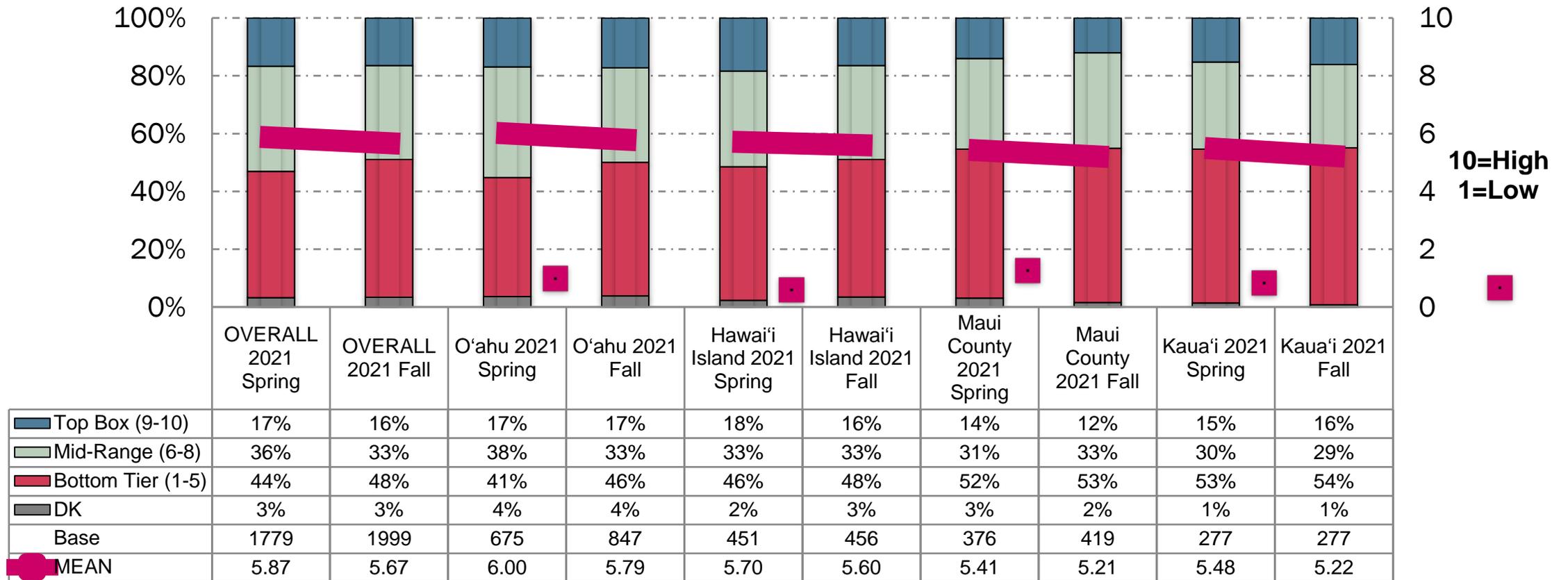
“Tourism has brought more benefits than problems” – *Overall Cont.*



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.

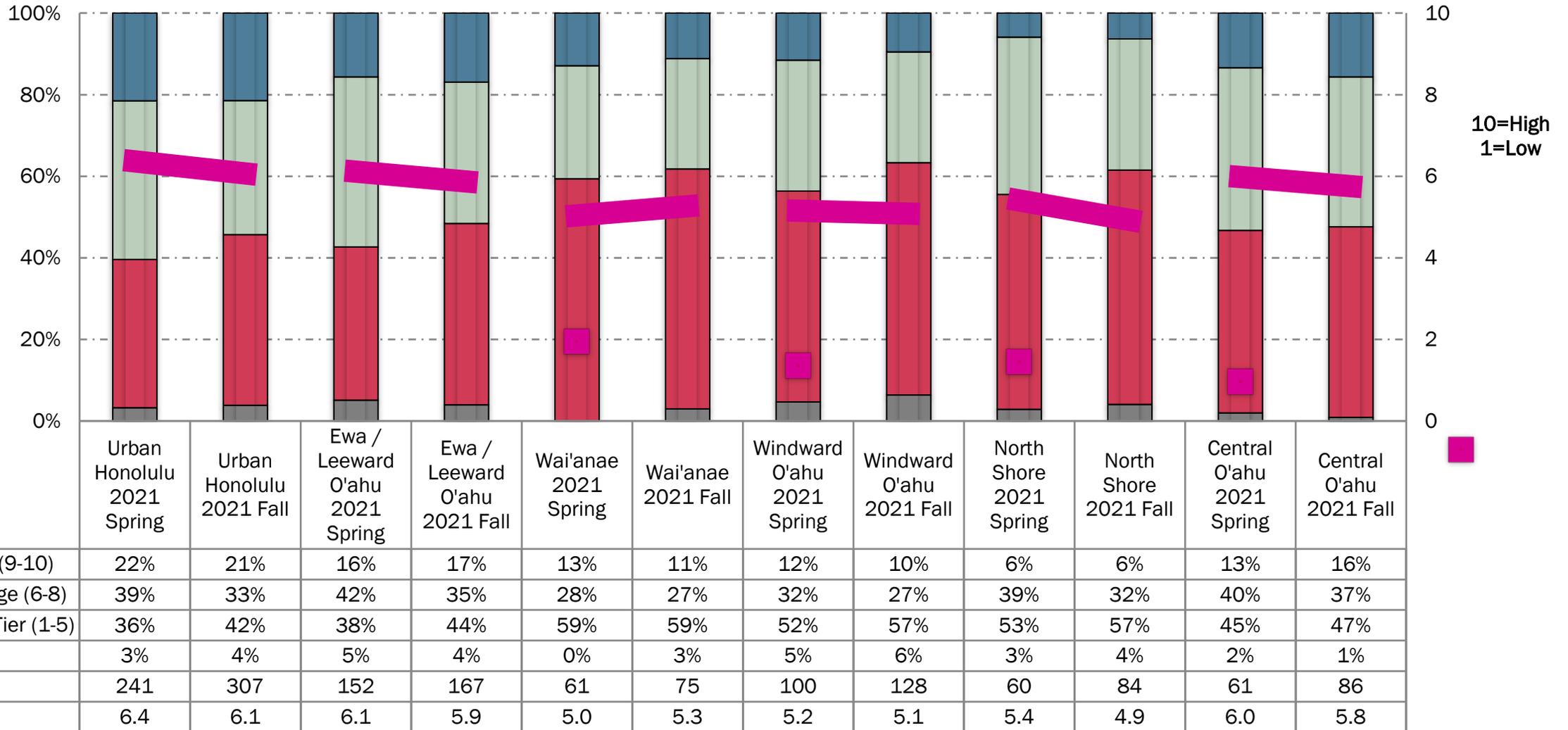
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



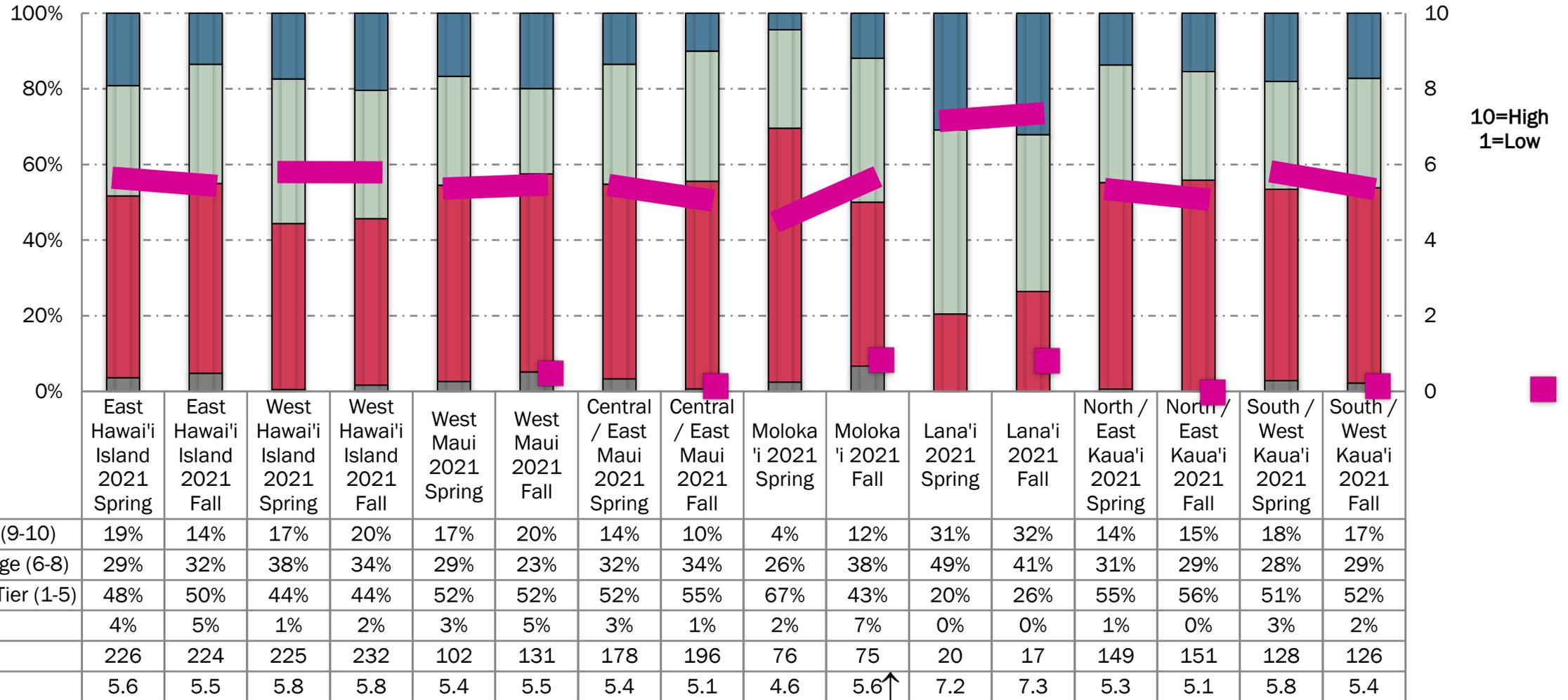
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – By Area (O’ahu)



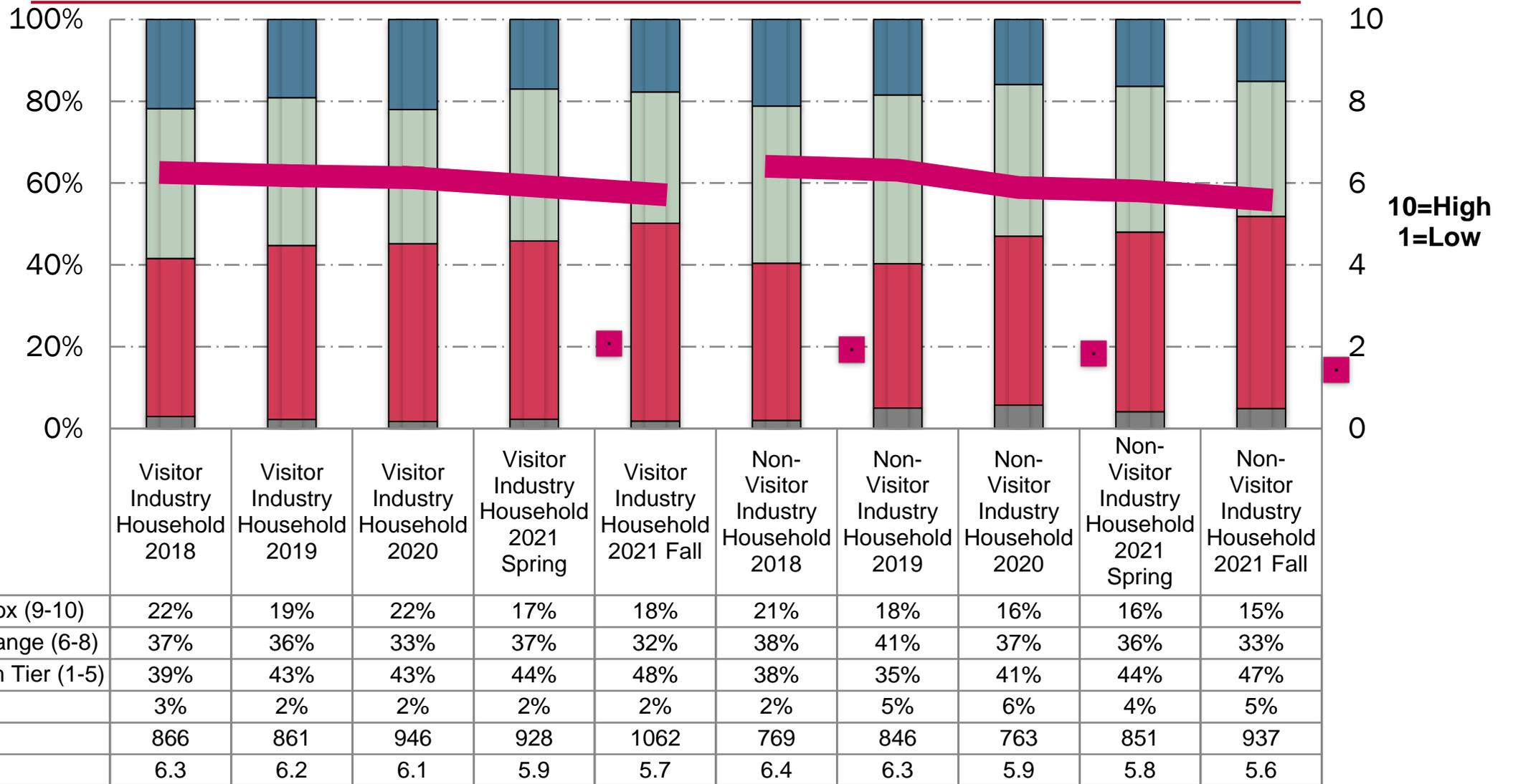
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



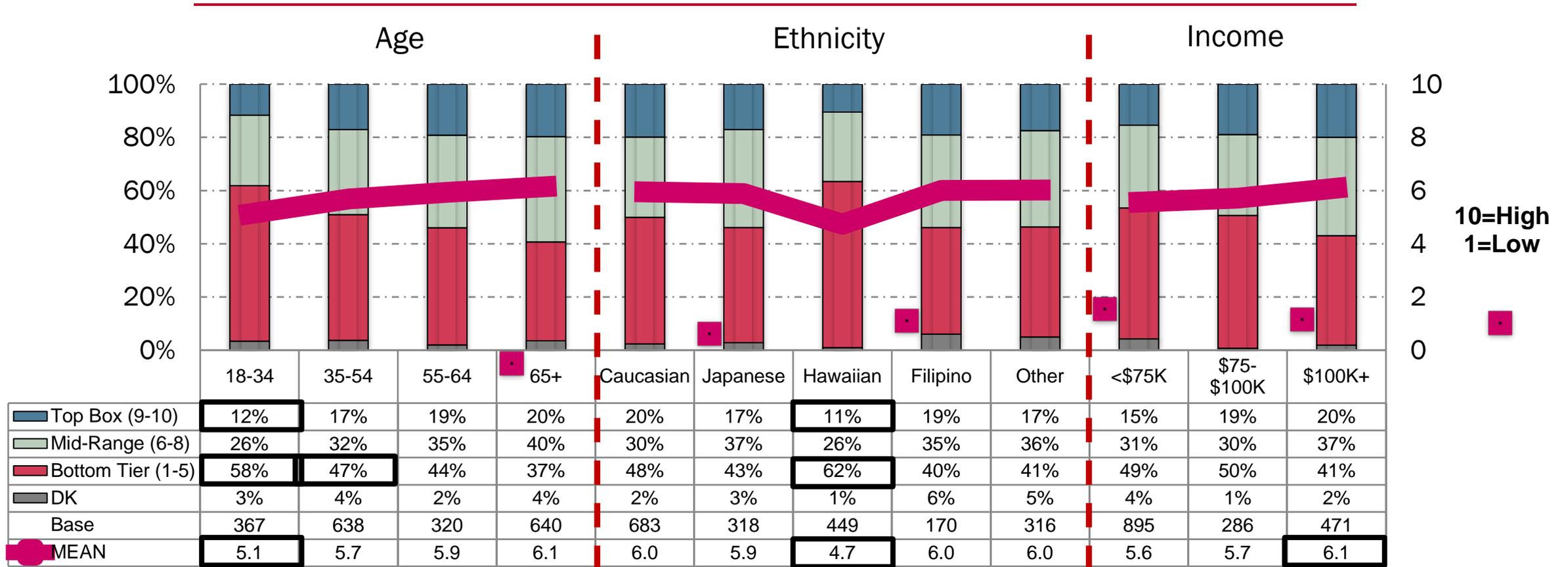
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

“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...?

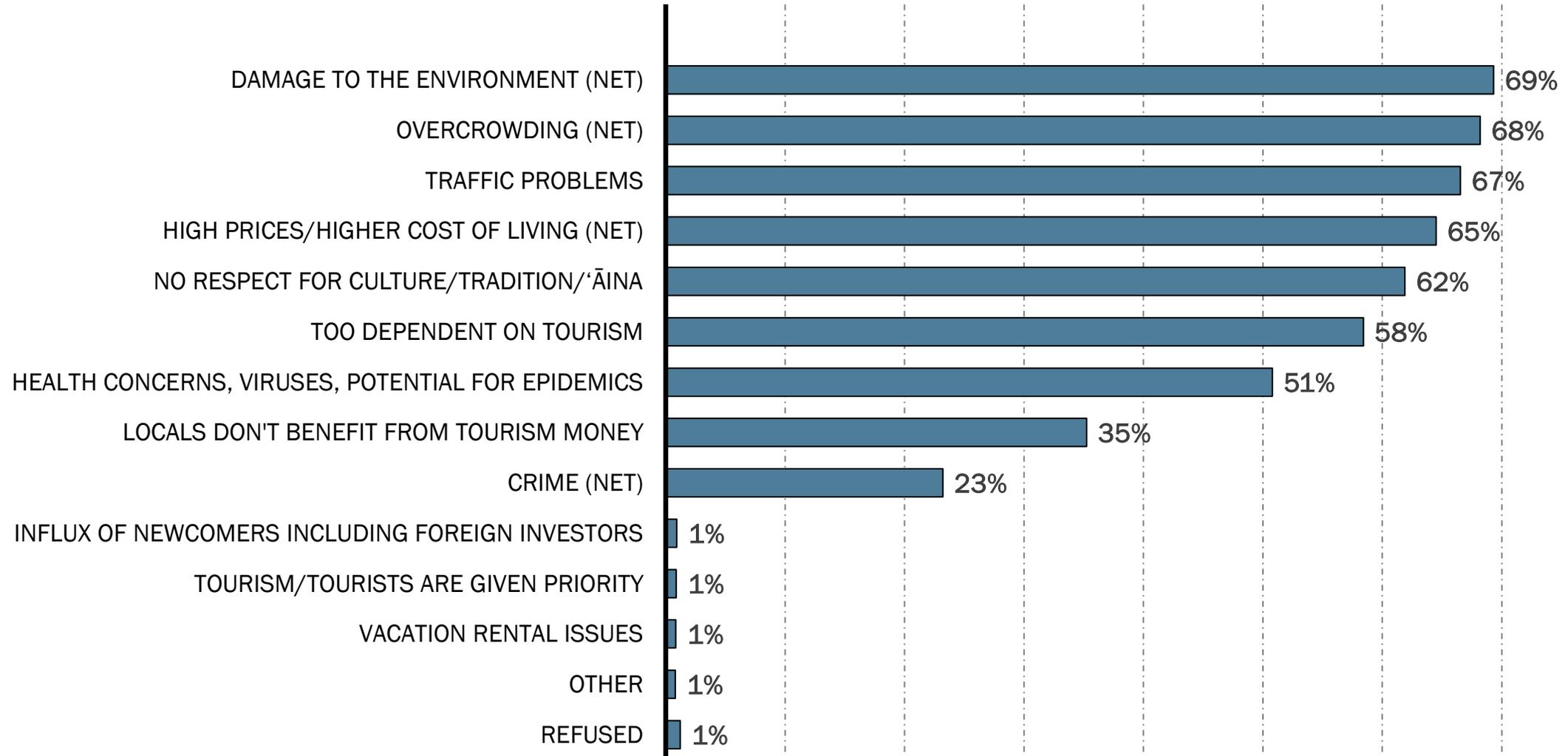
“Tourism has brought more benefits than problems” – *By Demographics*



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 2021 only)

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

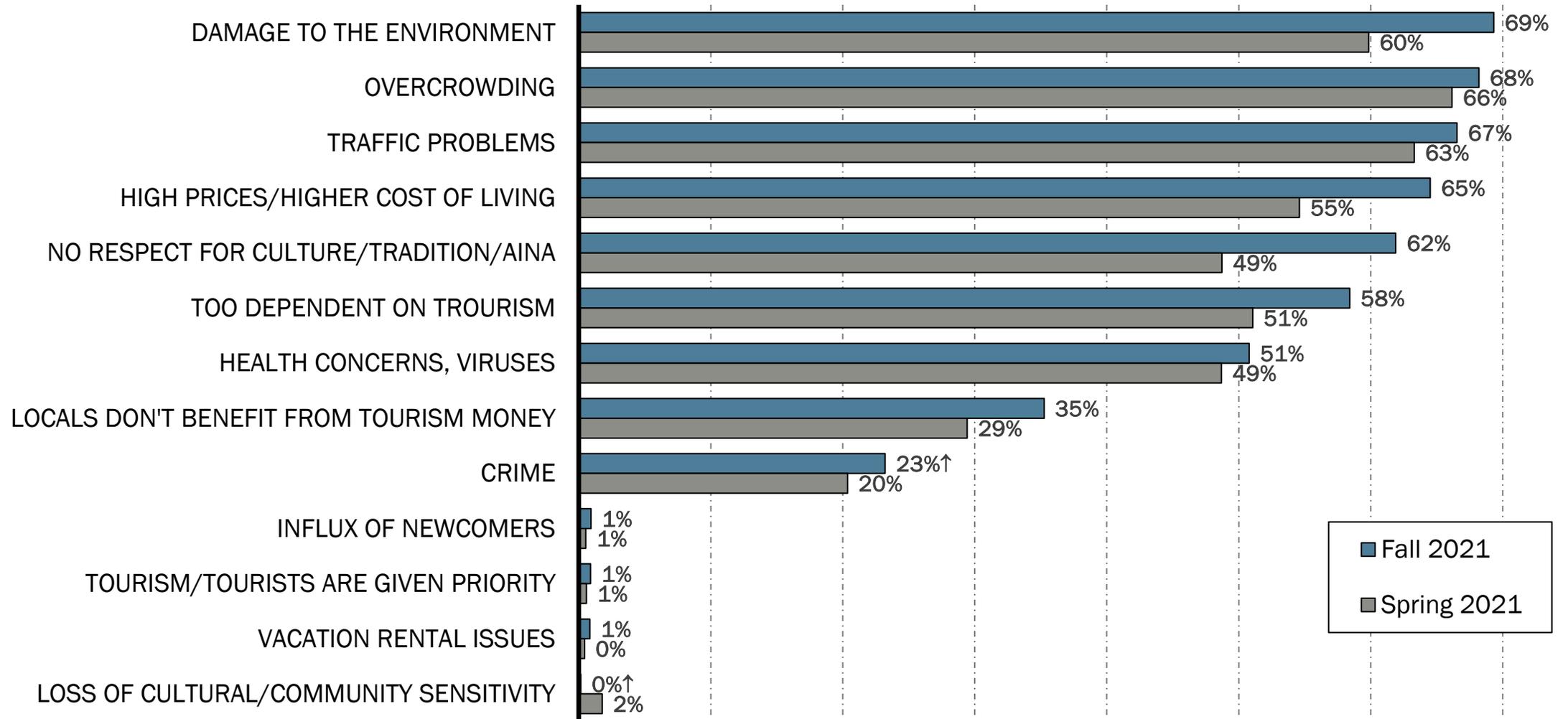


Base: 973

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

Problems Created by Tourism in Hawai'i (Trends Spring and Fall 2021)

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

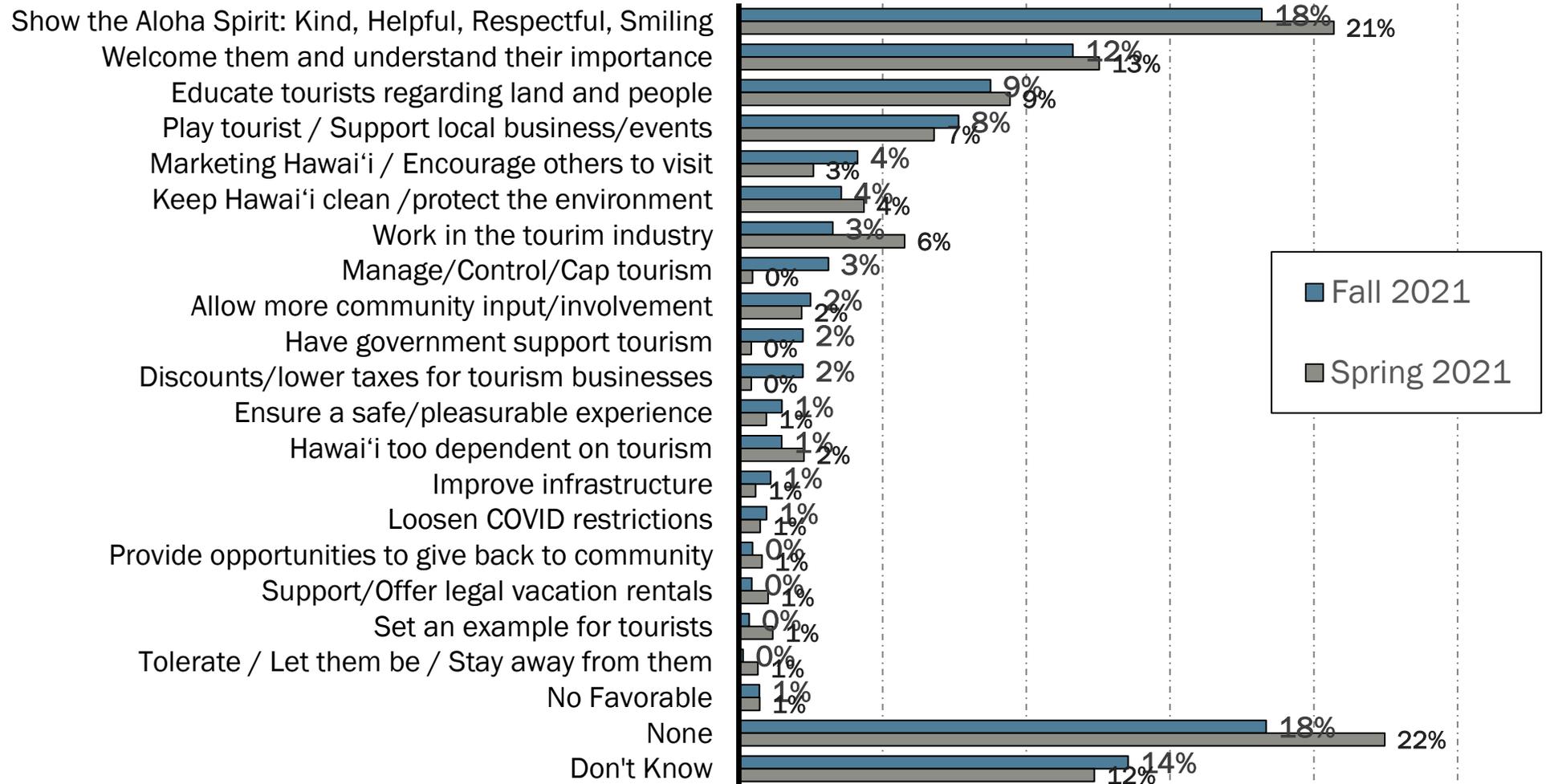


Base: Spring 2021 (808), Fall 2021 (973)

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

Ways Residents can Support Tourism in Hawai'i (Trends Spring and Fall 2021)

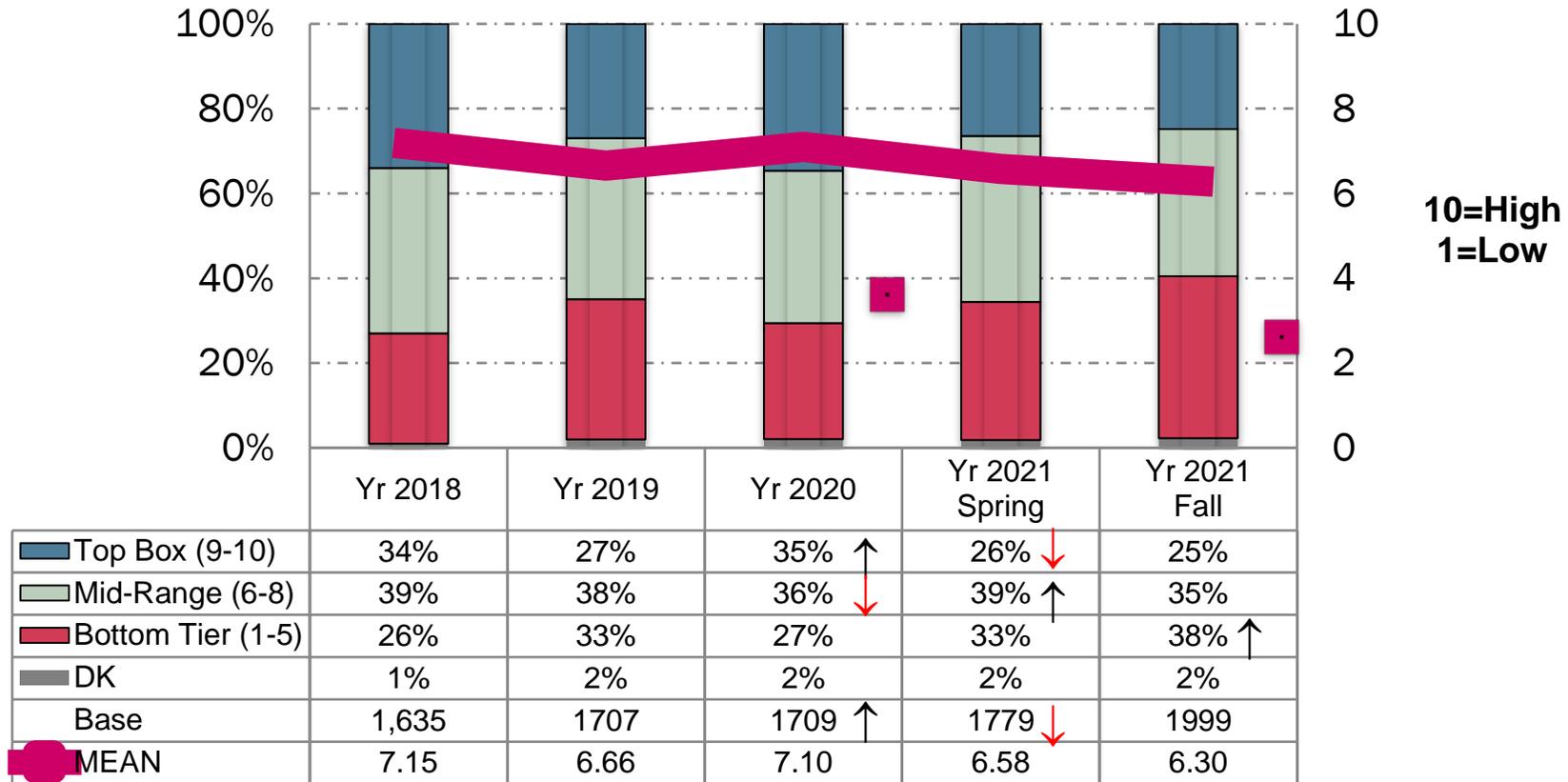
(According to residents saying Hawai'i tourism creates more **benefits** than problems)



Base: 1144 (Spring 2021), 1248 (Fall 2021)

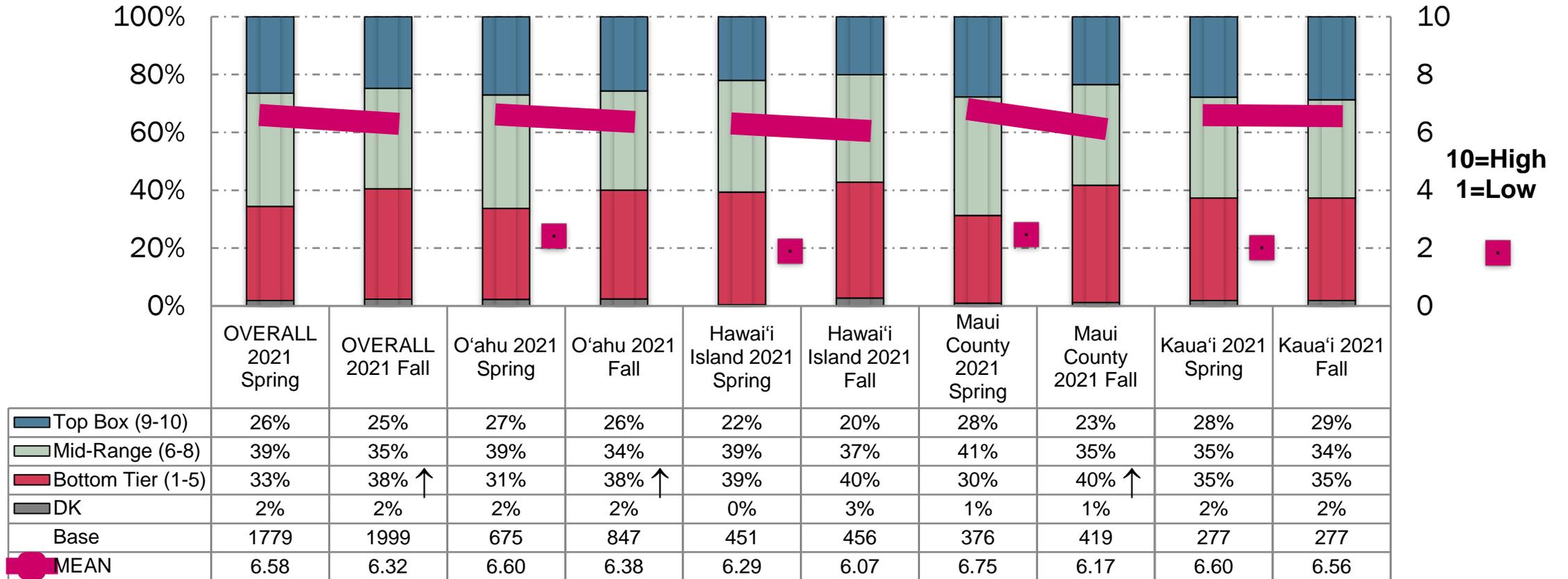
Q6. You indicated earlier that you were favorable toward tourism. Is there anything that residents like yourself can do to contribute to or support the tourism industry?

“Creates many well paying jobs for residents” - *Overall*



Q3.1. 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?

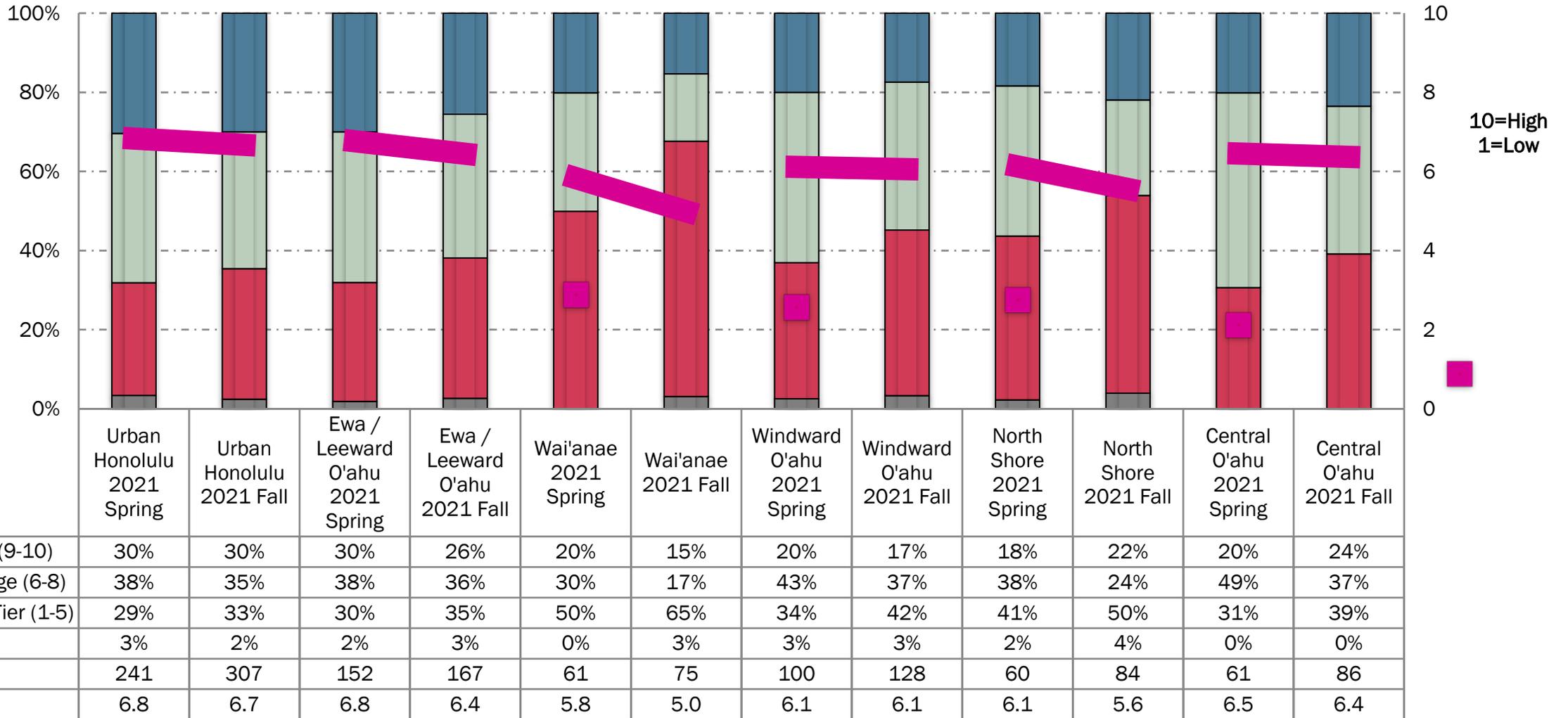
“Creates many well paying jobs for residents” – *By Island*



Q3.1. 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...?

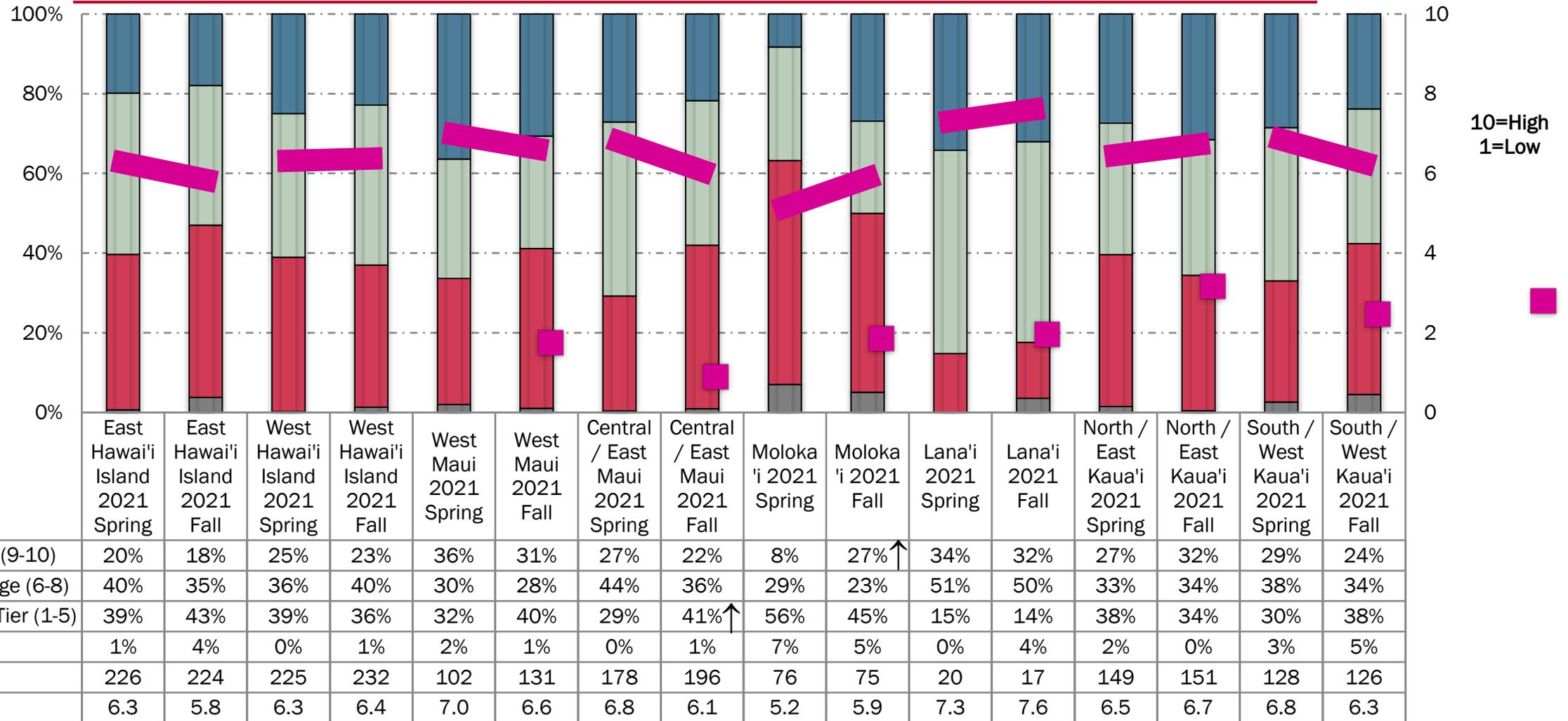
“Creates many well paying jobs for residents” –

By Area (O'ahu)



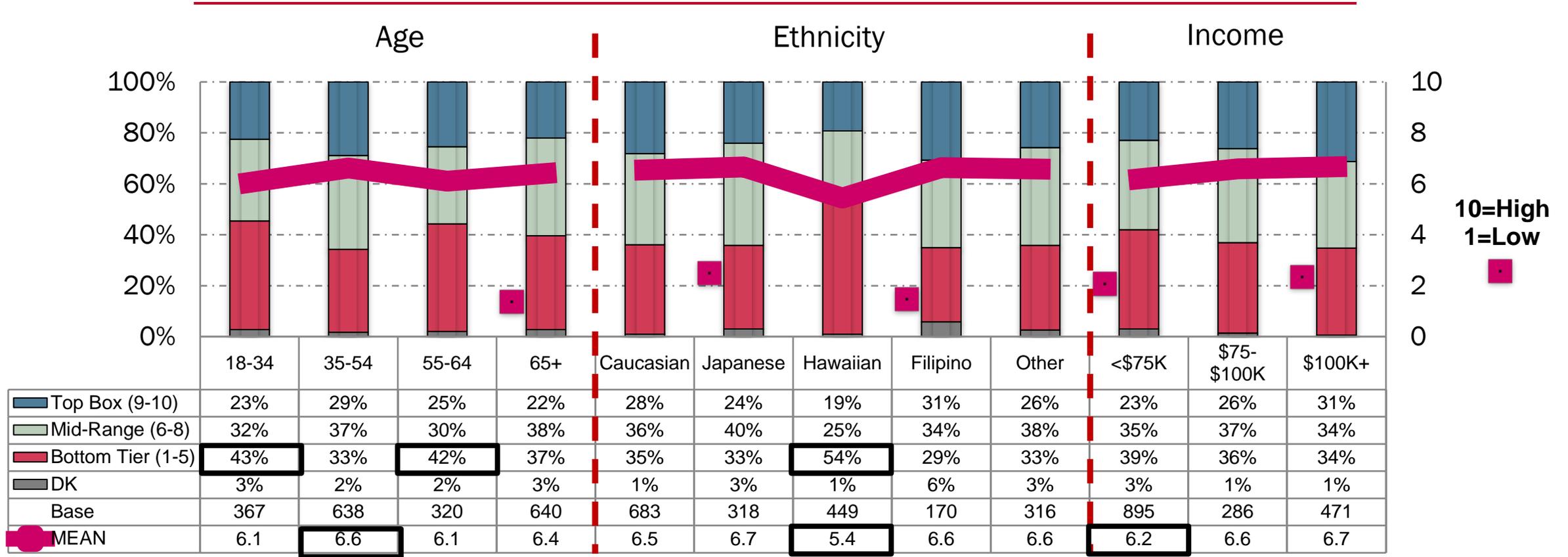
Q3.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates many well paying jobs for residents” – By Area (Hawai'i Island, Maui, & Kaua'i)



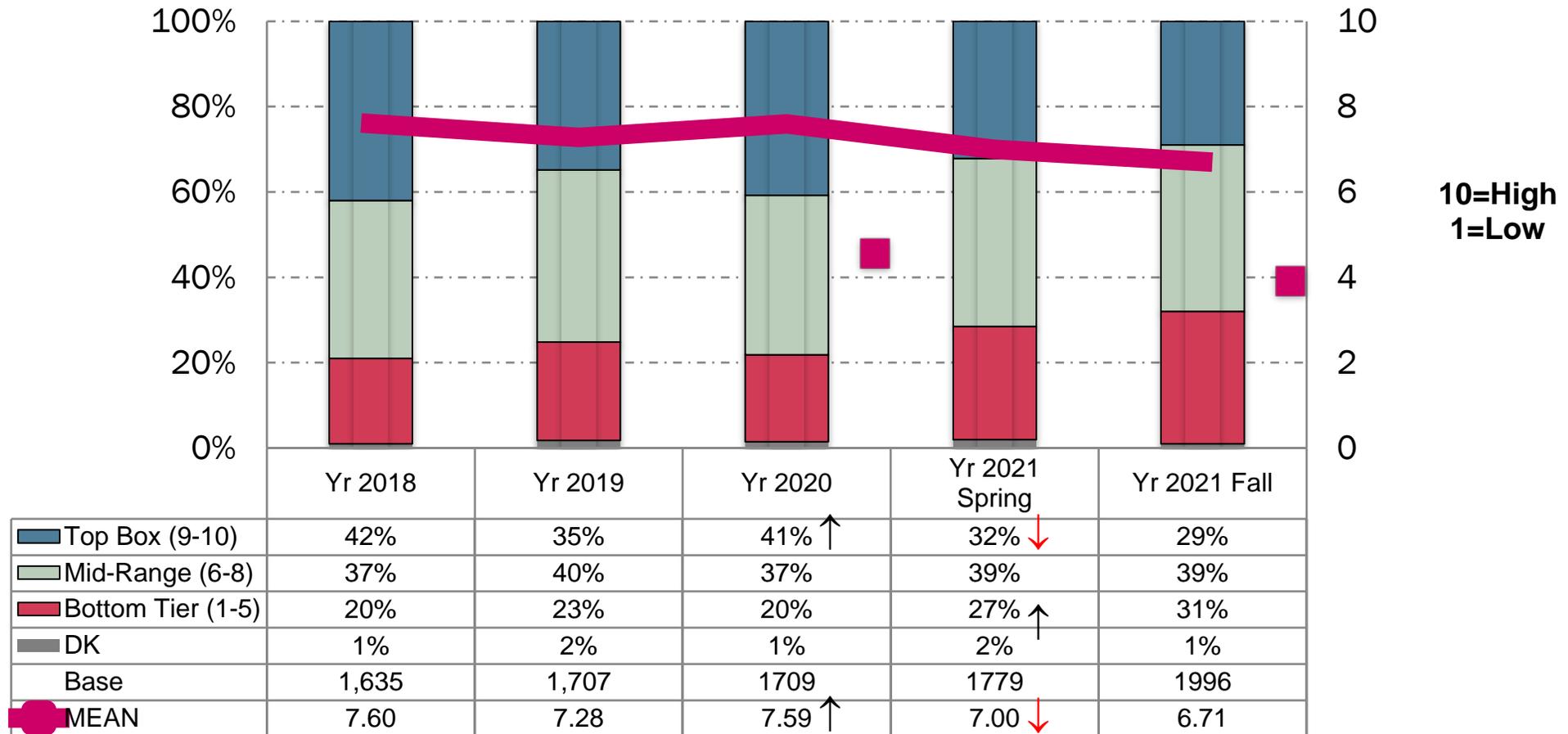
Q3.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

“Creates many well paying jobs for residents” – *By Demographics*



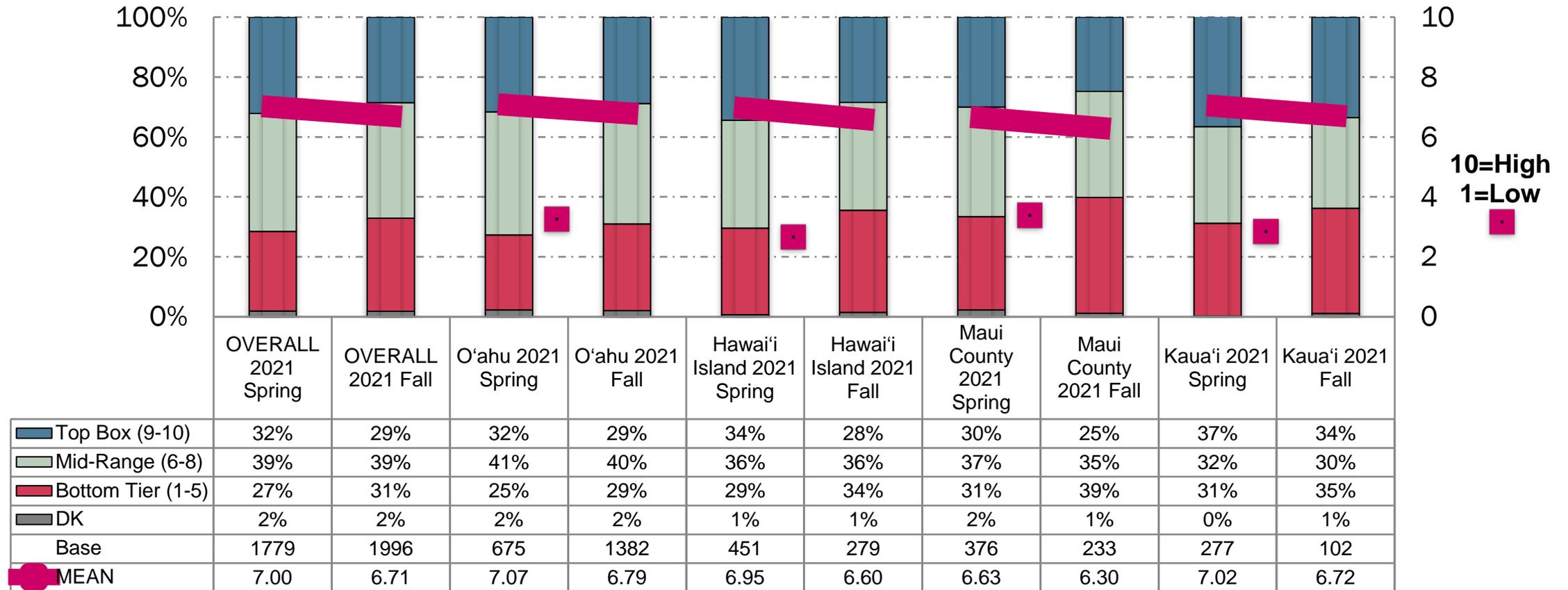
Q3.1. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



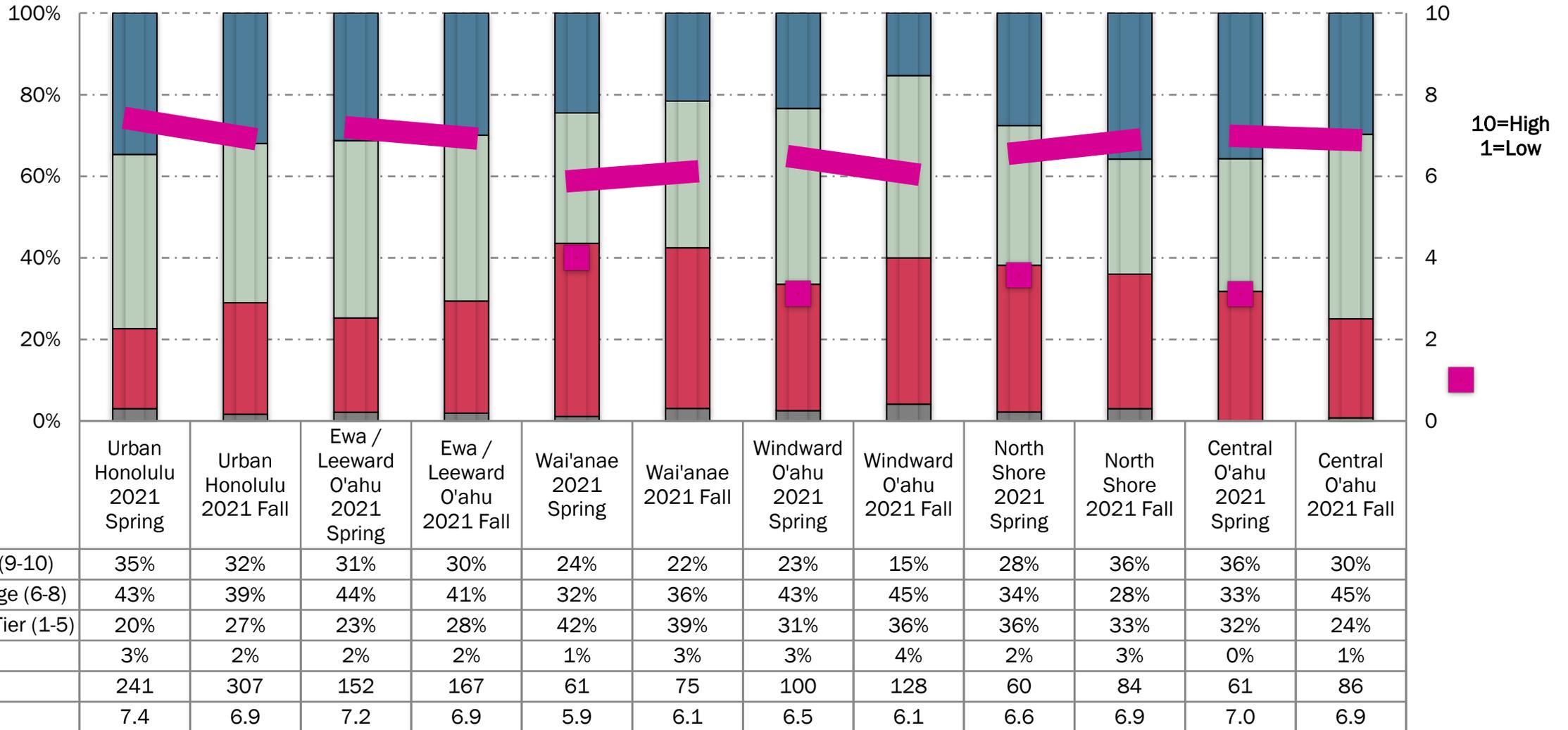
Q3.2. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates shopping, restaurants, and entertainment opportunities for residents” - *By Island*



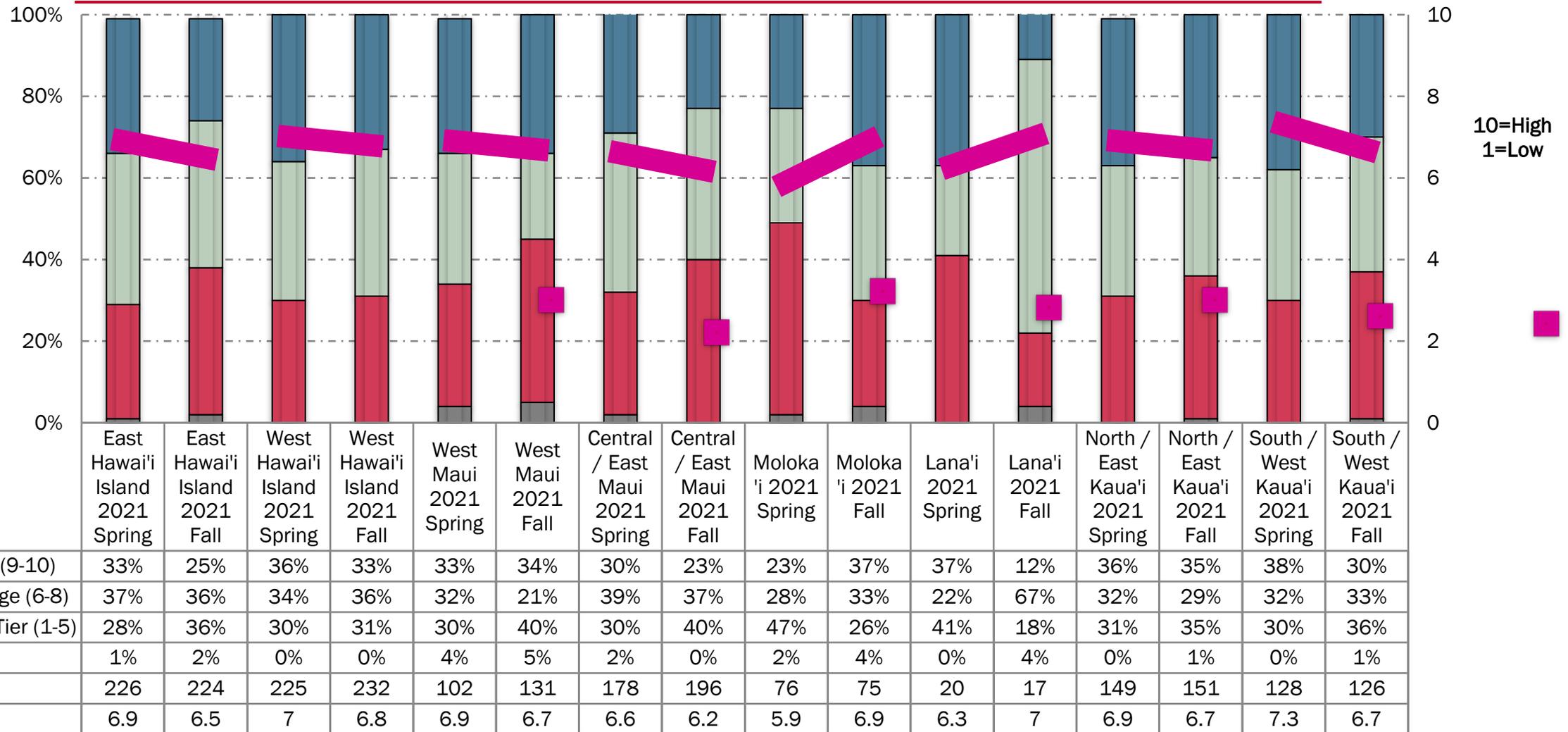
Q3.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q3.2. 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...?

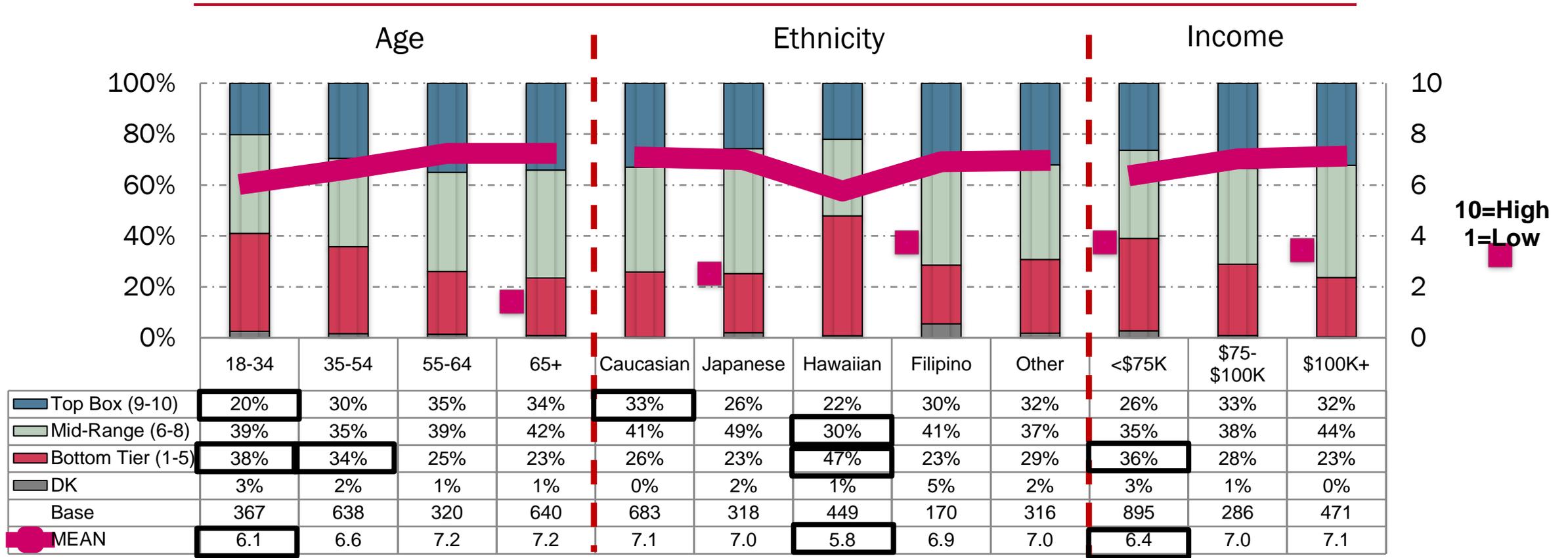
“Creates shopping, restaurants, and entertainment opportunities for residents” – *By Area (Hawai'i Island, Maui, & Kaua'i)*



Q3.2. 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.

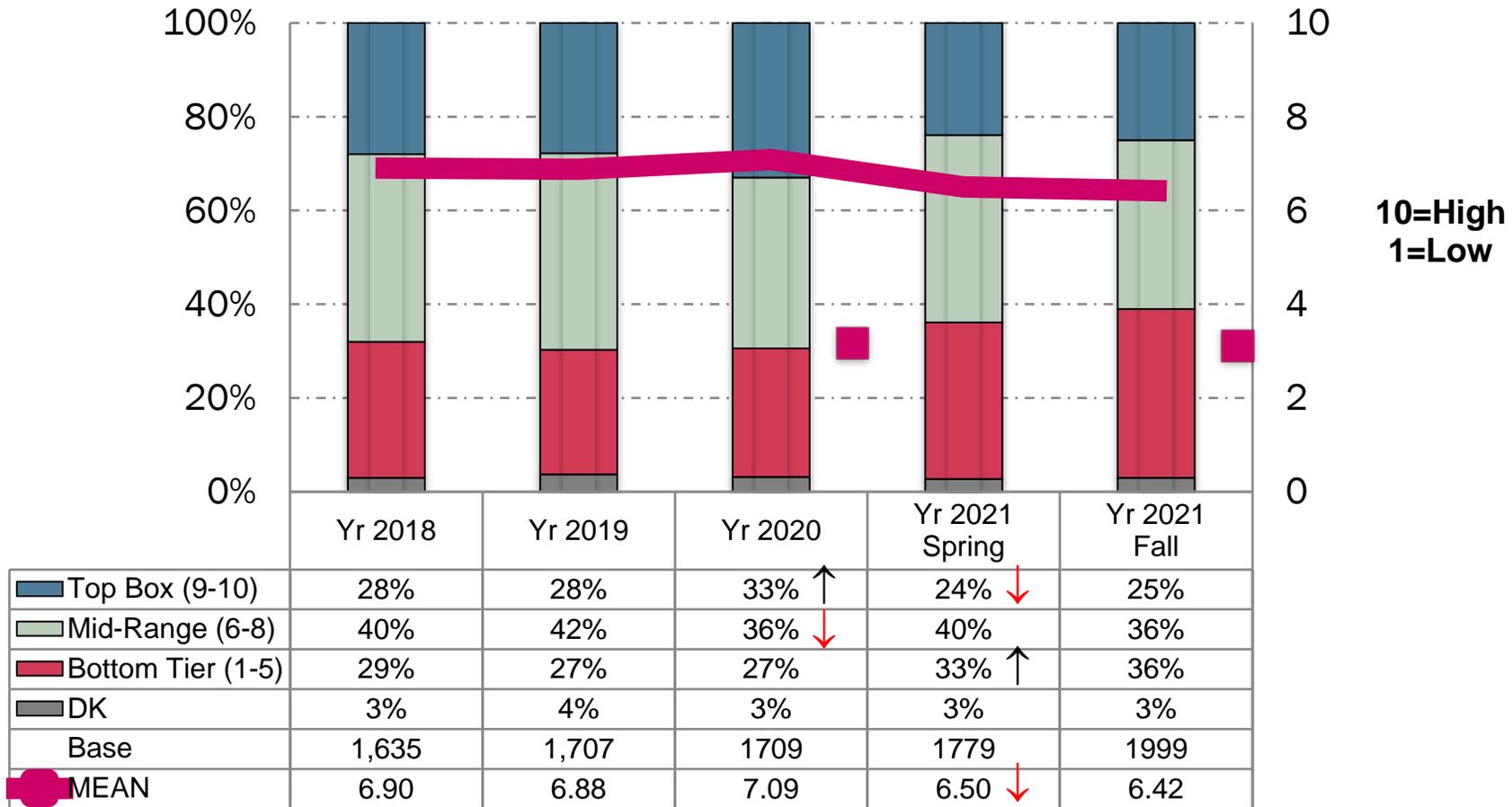
“Creates shopping, restaurants and entertainment opportunities for residents”

– *By Demographics*



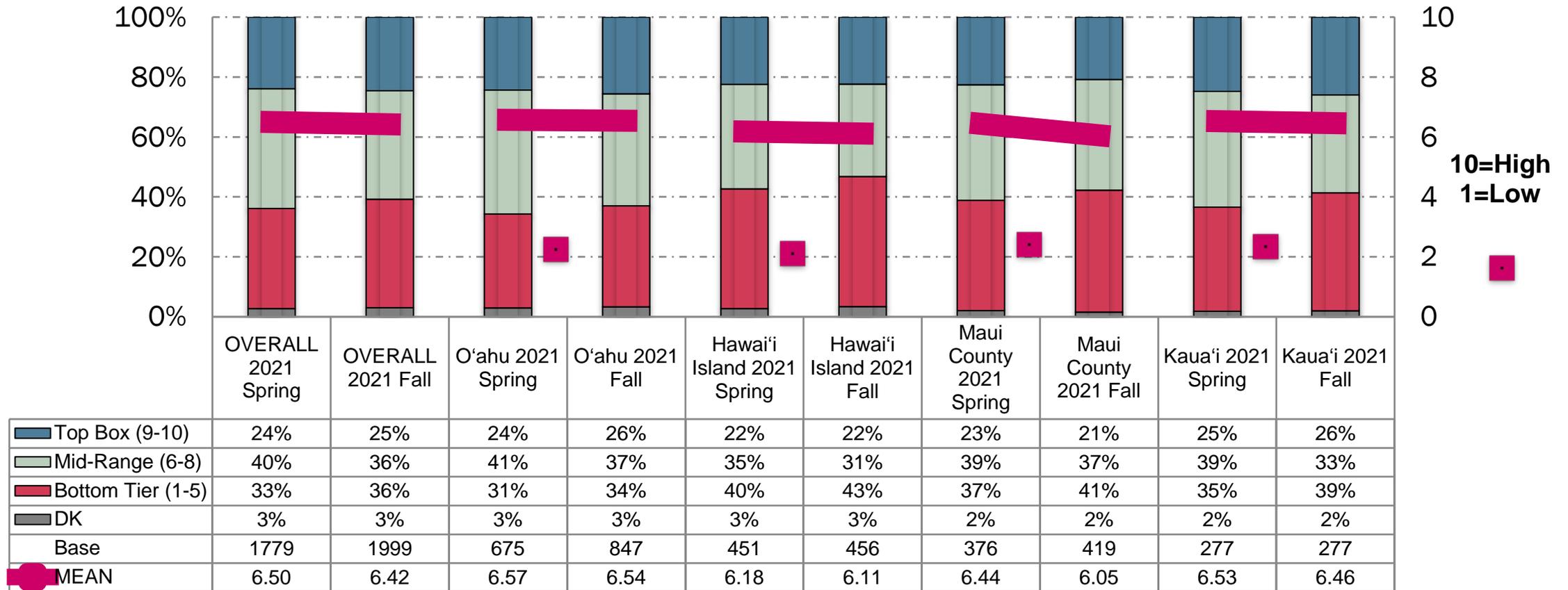
Q3.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Creates jobs that have opportunities for advancement” - *Overall*



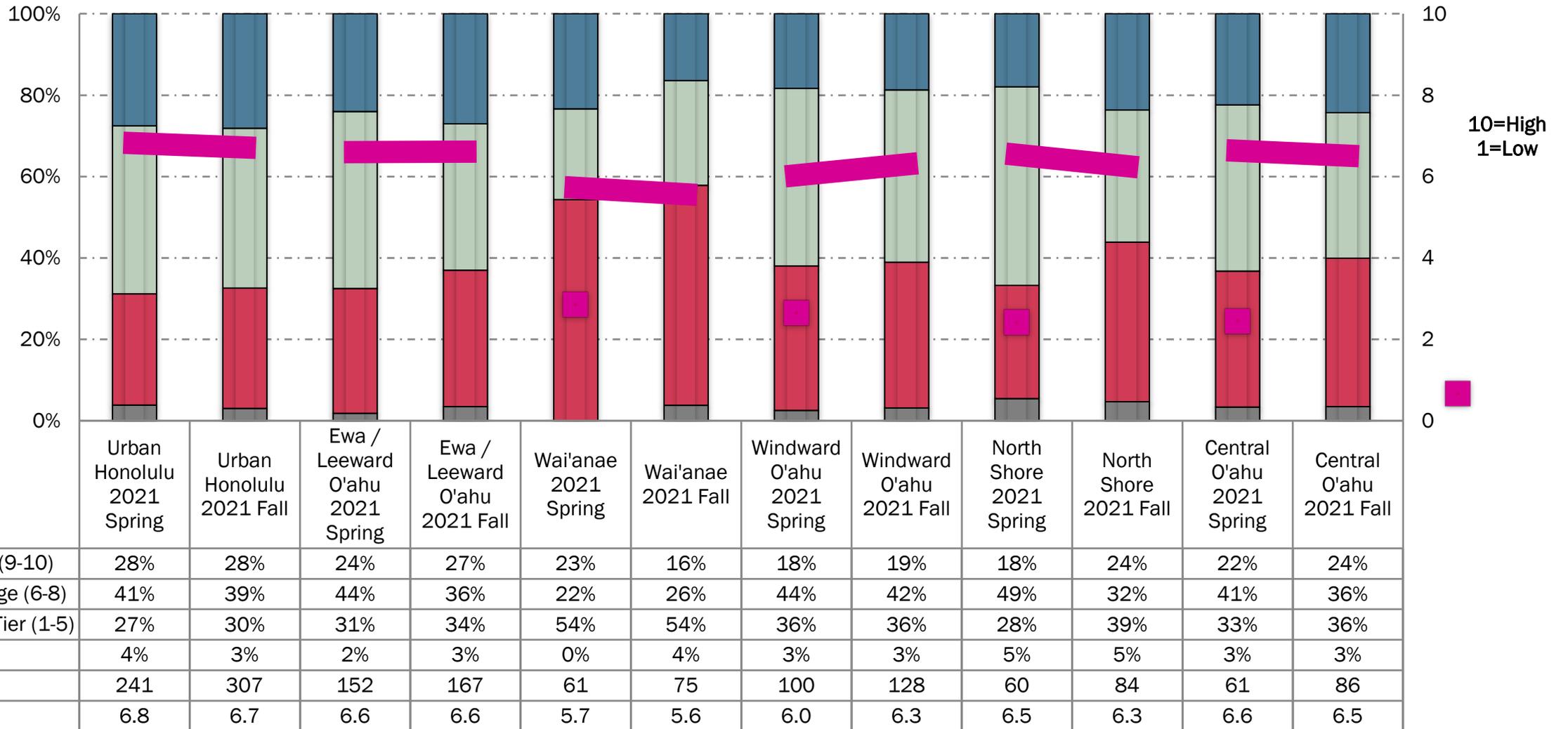
Q3.3. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates jobs that have opportunities for advancement” – *By Island*



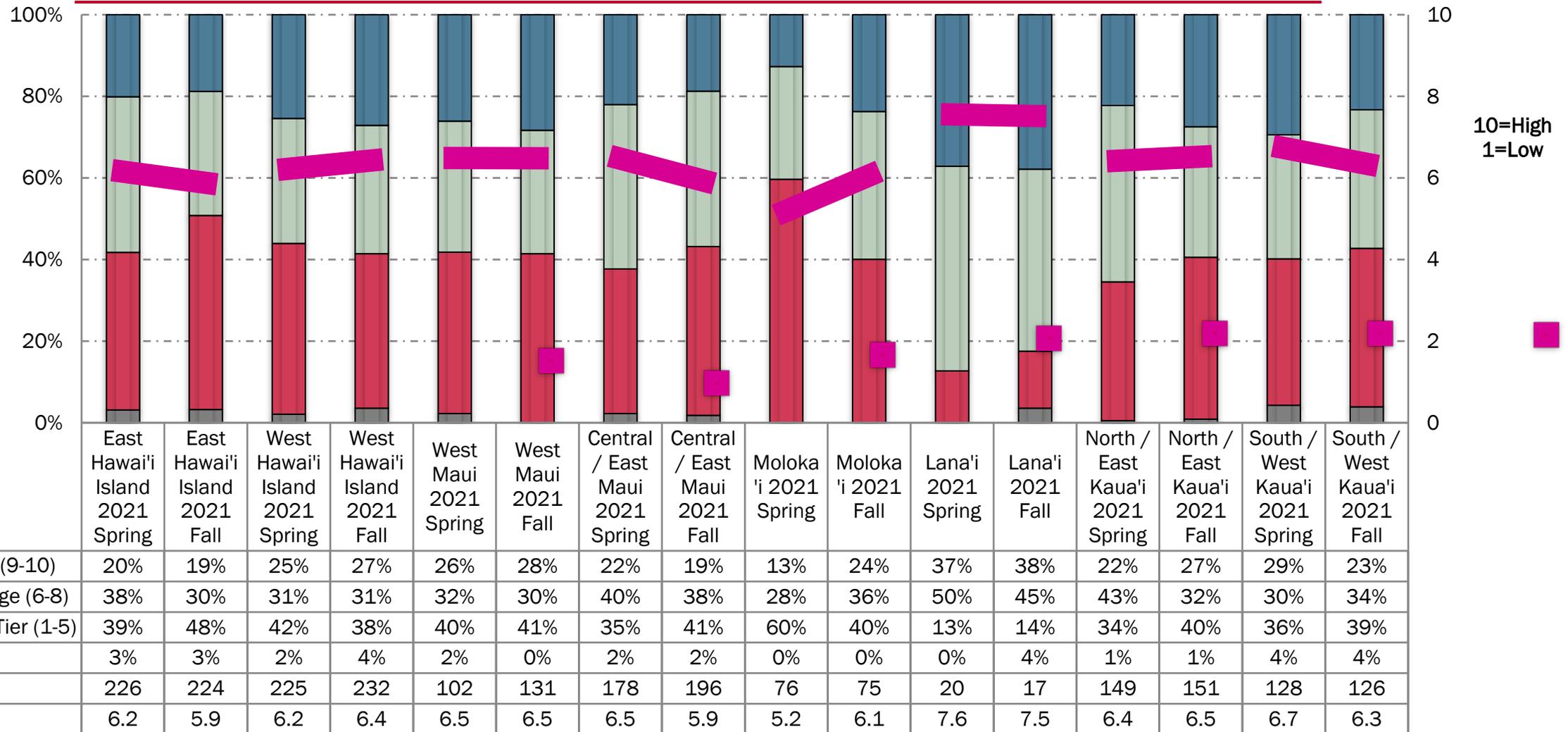
Q3.3. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates jobs that have opportunities for advancement” – By Area (O’ahu)



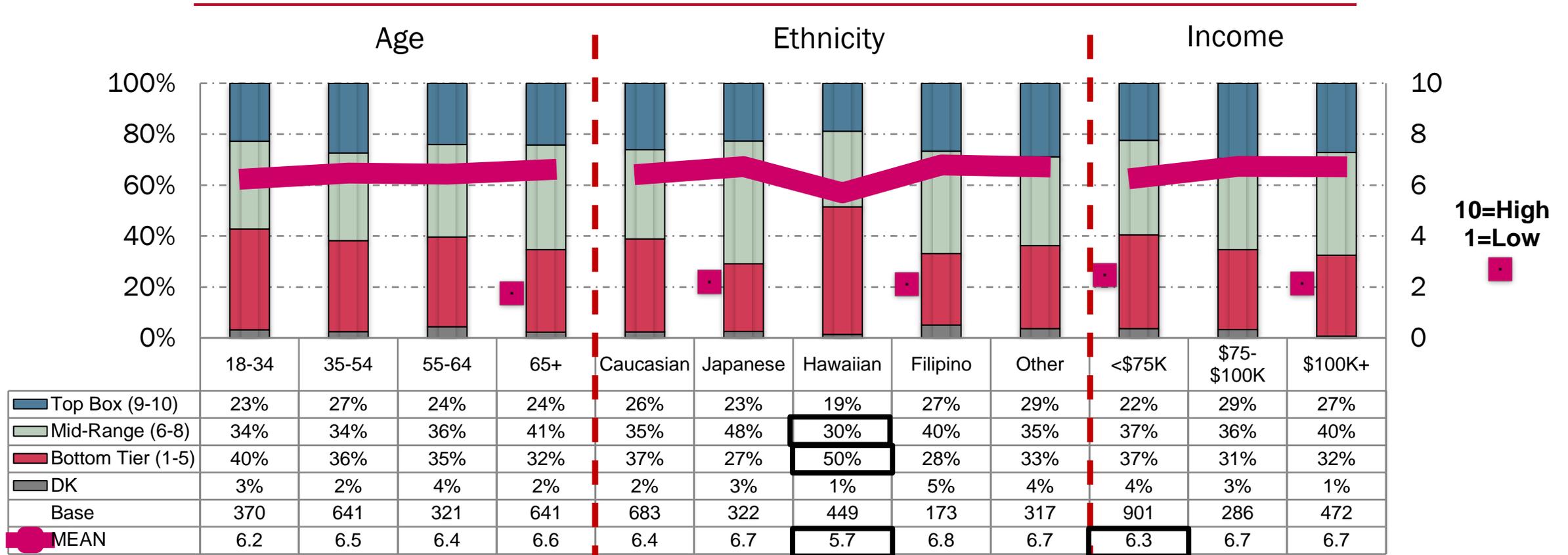
Q3.3. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates jobs that have opportunities for advancement” – *By Area* (Hawai‘i Island, Maui, & Kaua‘i)



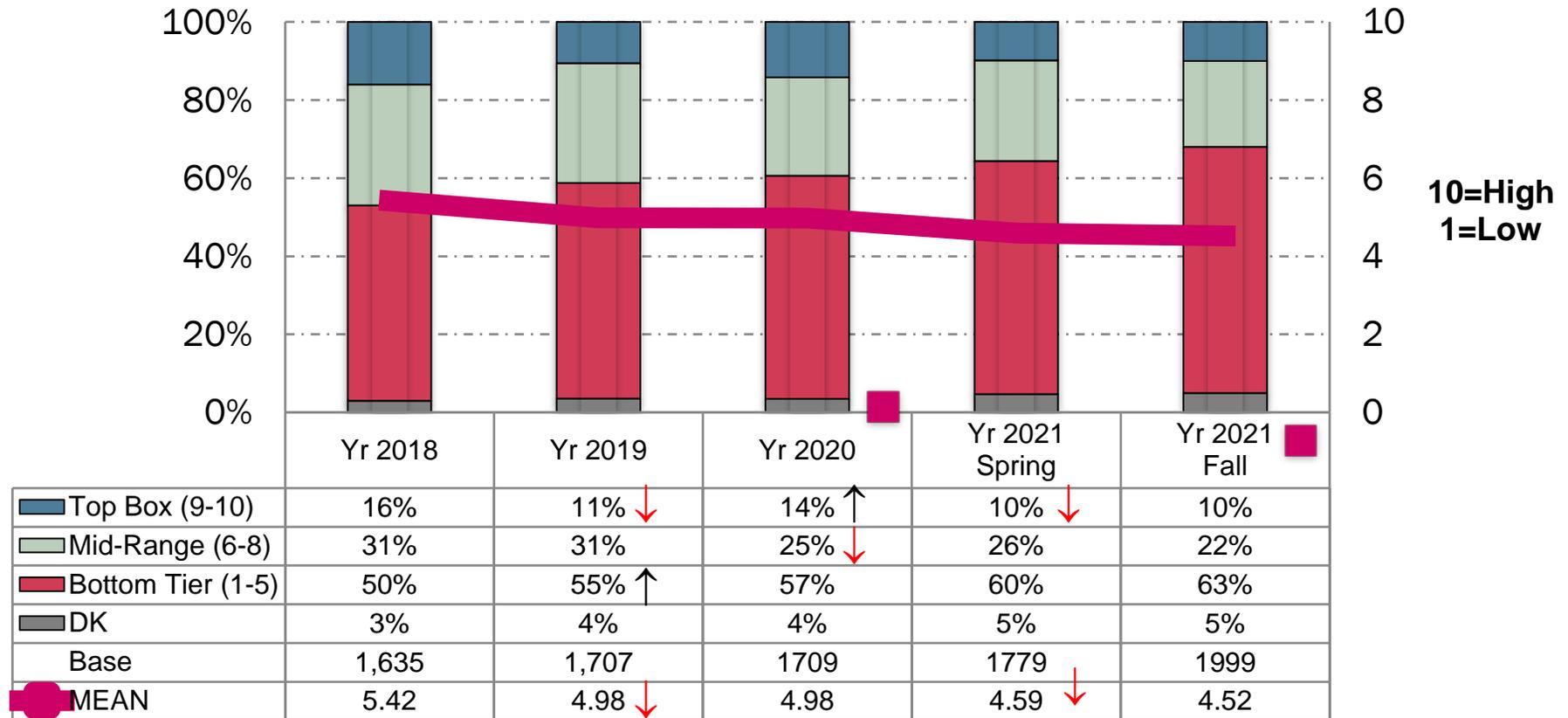
Q3.3. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

“Creates jobs that have opportunities for advancement” – *By Demographics*



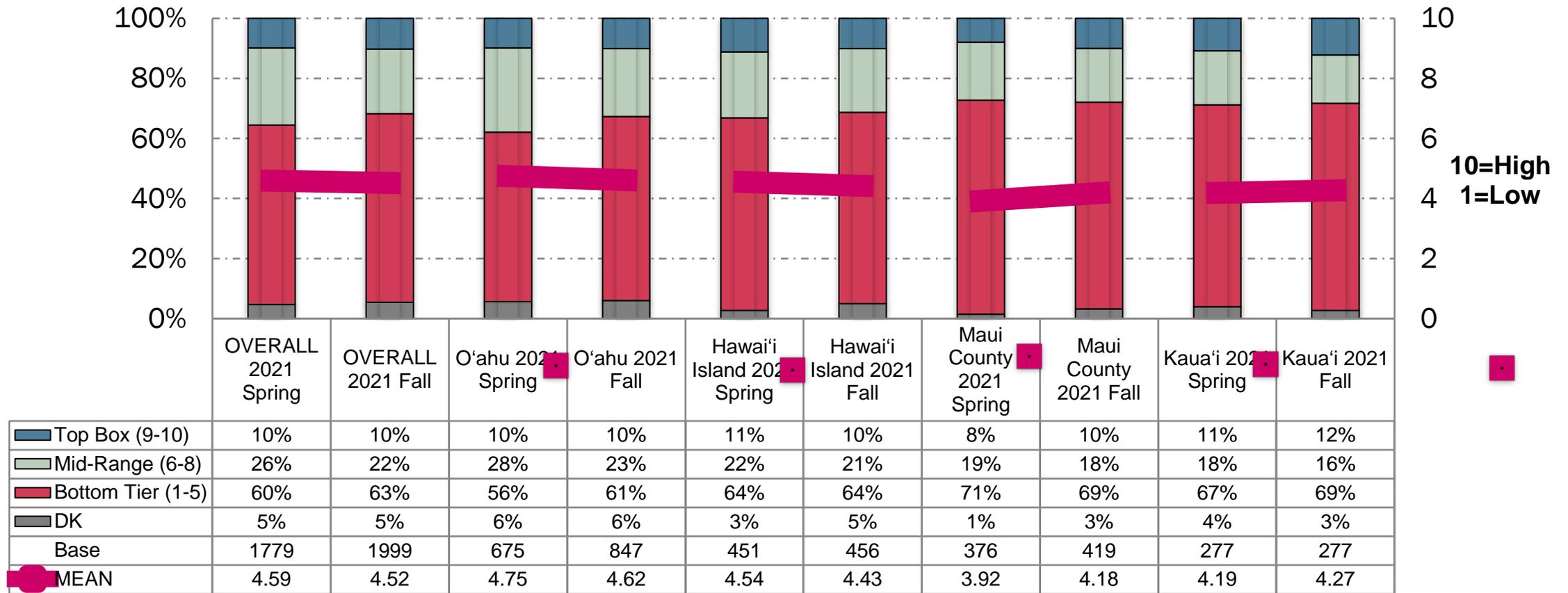
Q3.3. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Helps preserve Native Hawaiian culture and language” - *Overall*



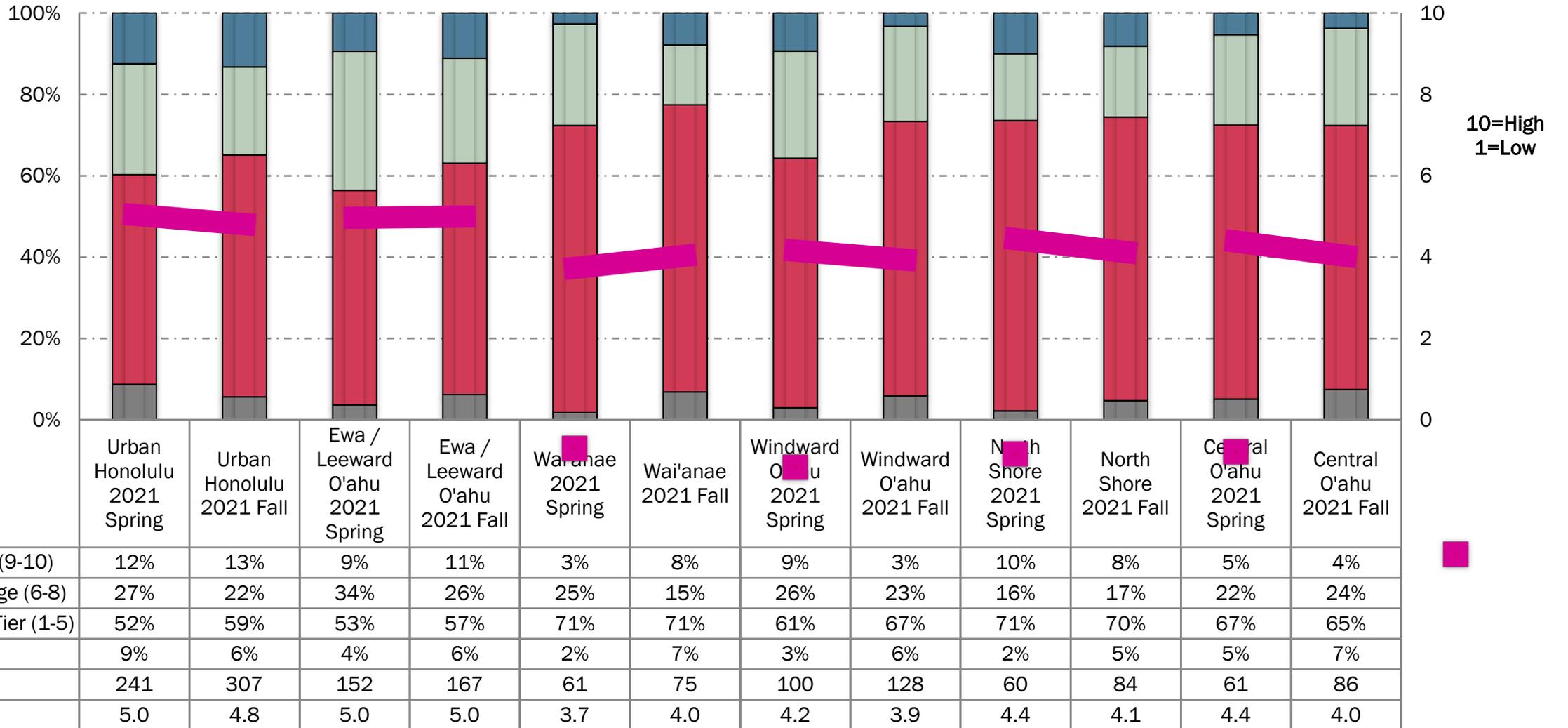
Q3.4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Helps preserve Native Hawaiian culture and language” – *By Island*



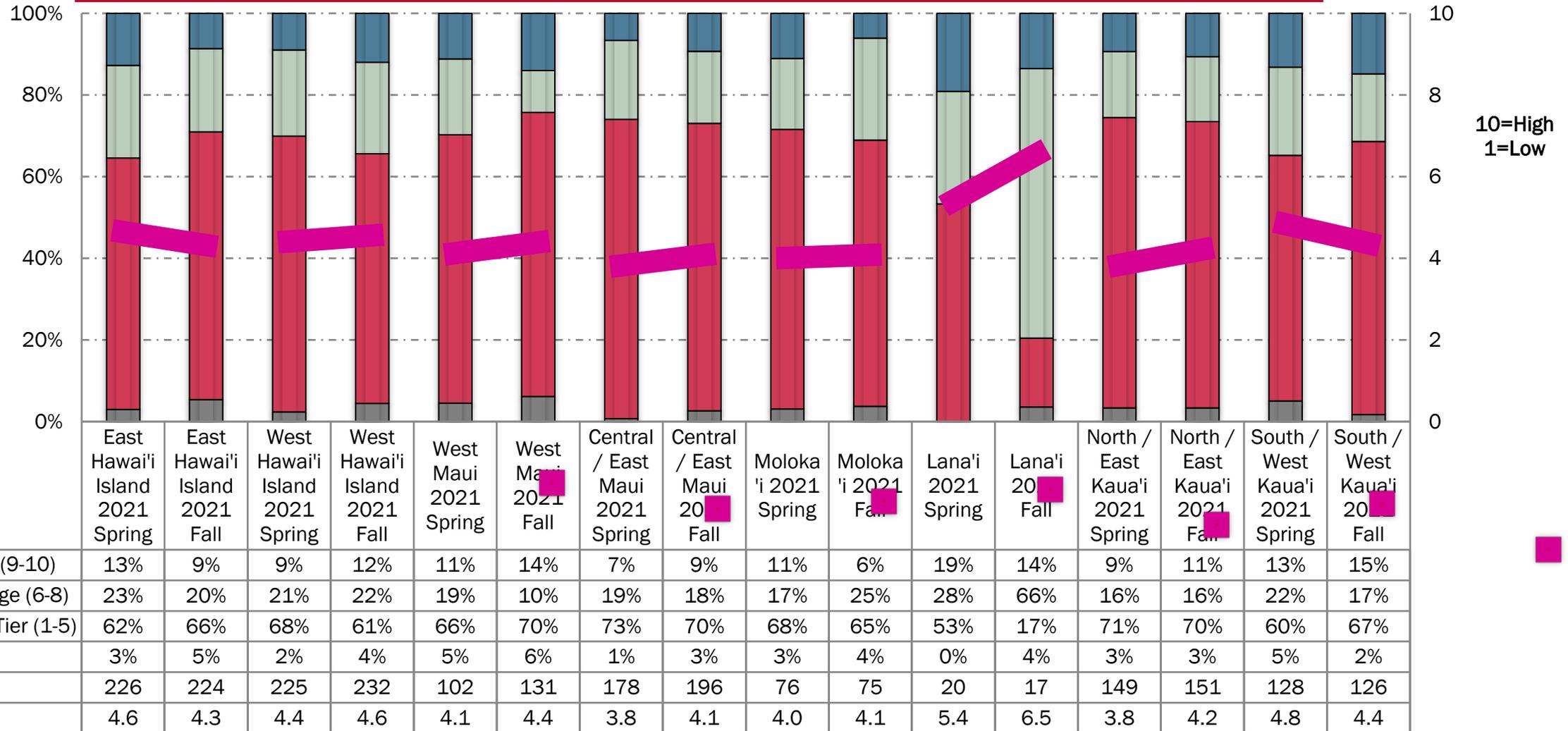
Q3.4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Helps preserve Native Hawaiian culture and language” – By Area (O‘ahu)



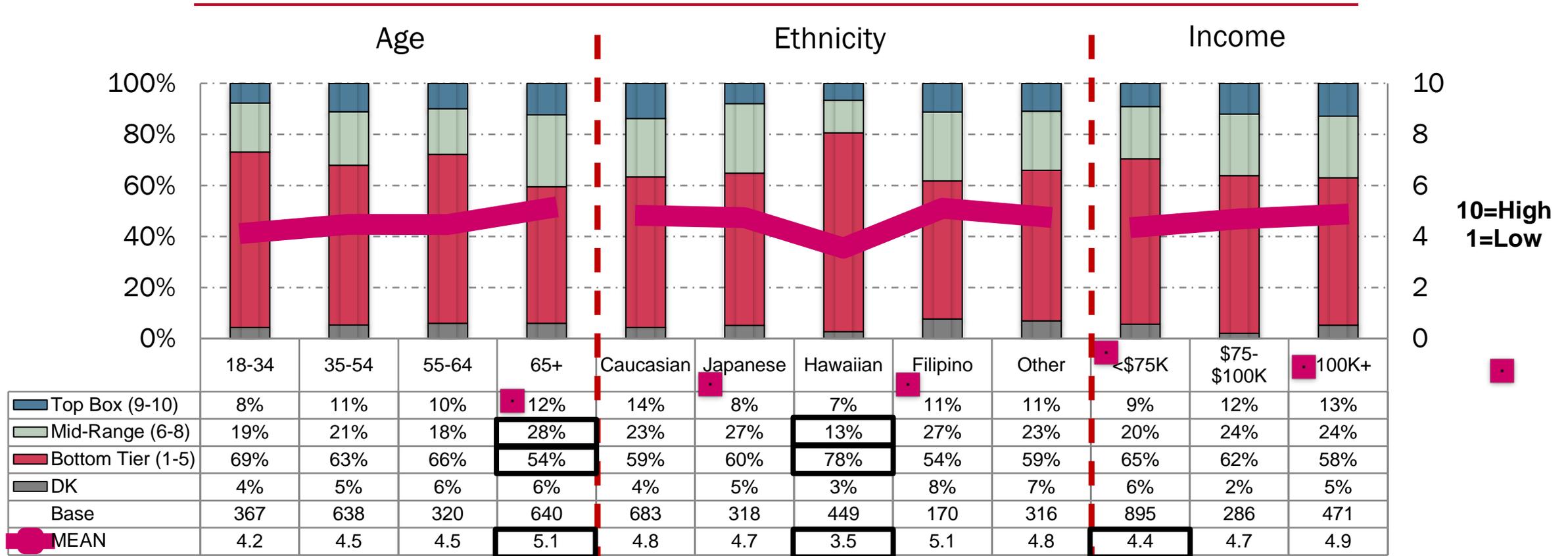
Q3.4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Helps preserve Native Hawaiian culture and language” – By Area (Hawai'i Island, Maui, & Kaua'i)



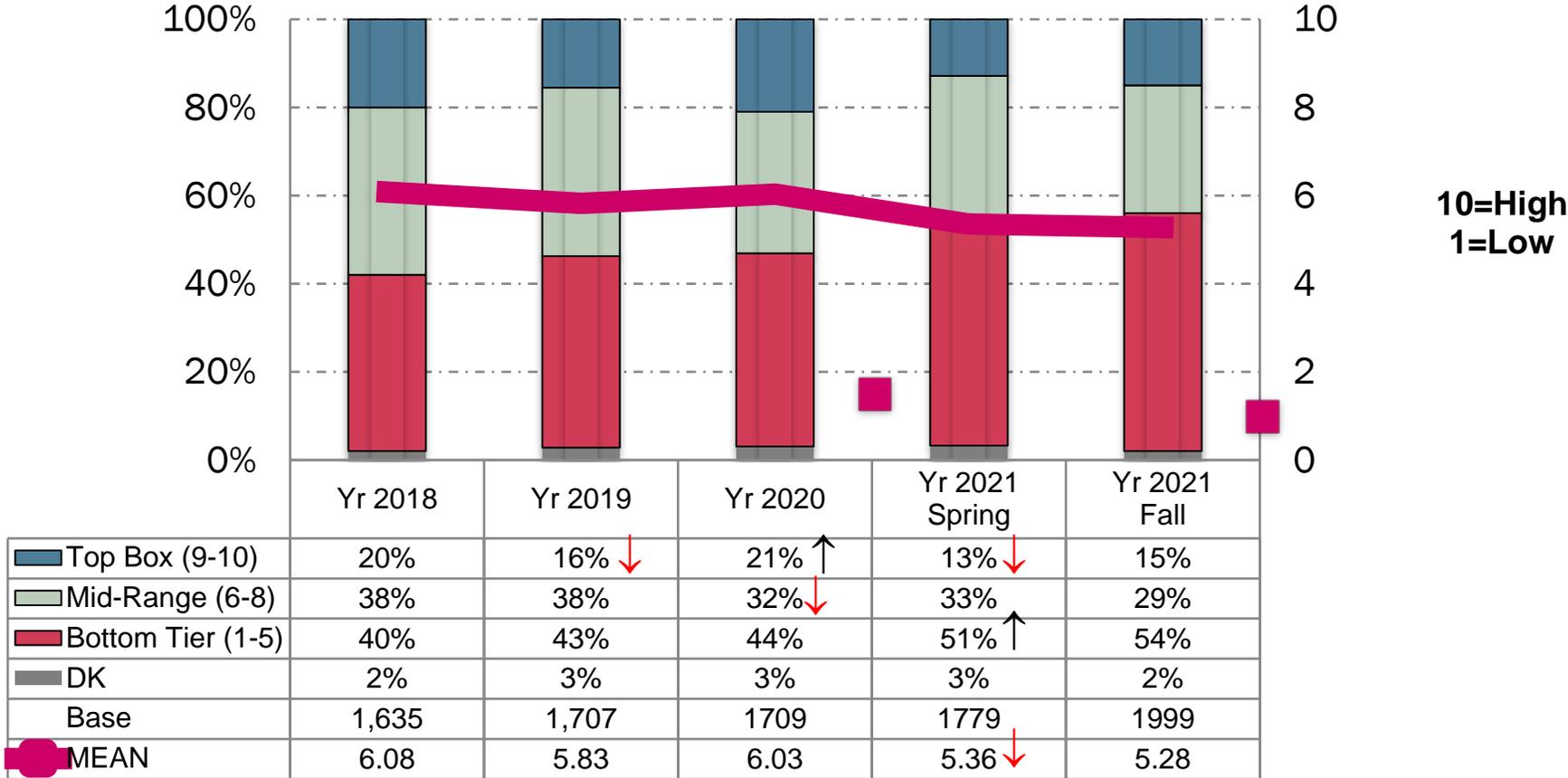
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“Helps preserve Native Hawaiian culture and language” – *By Demographics*



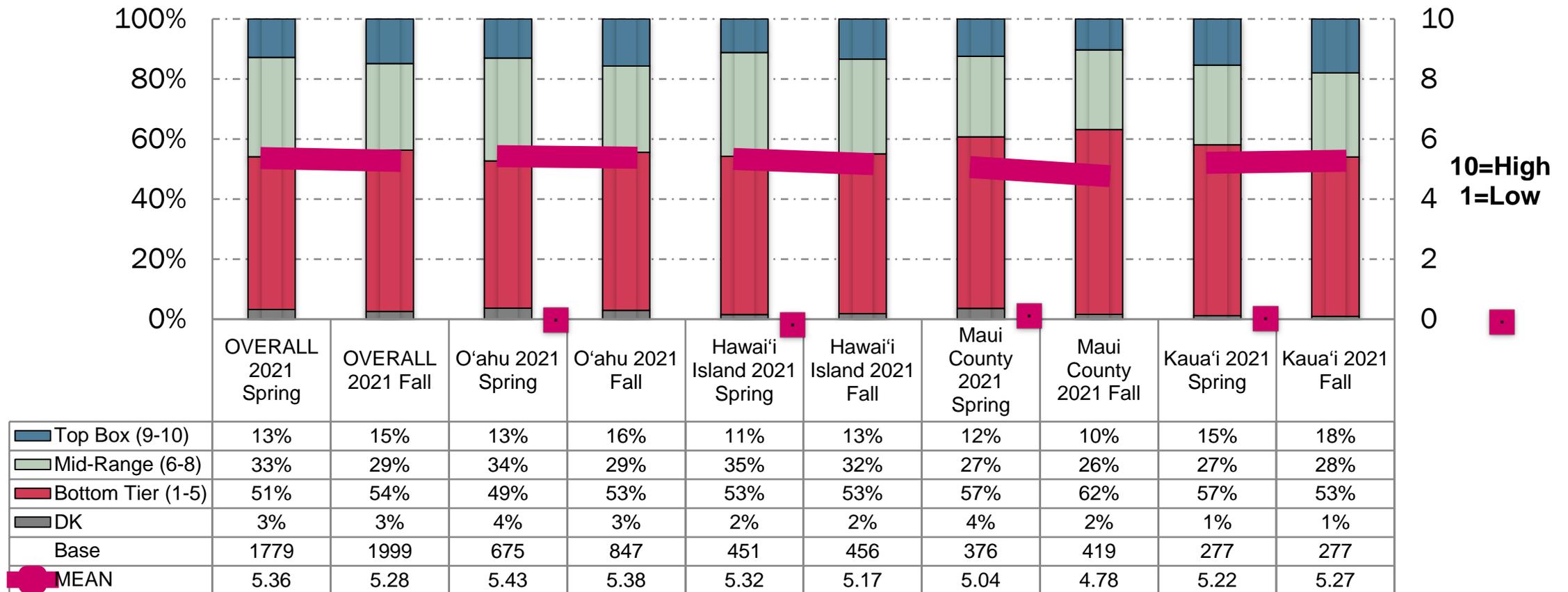
Q3.4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



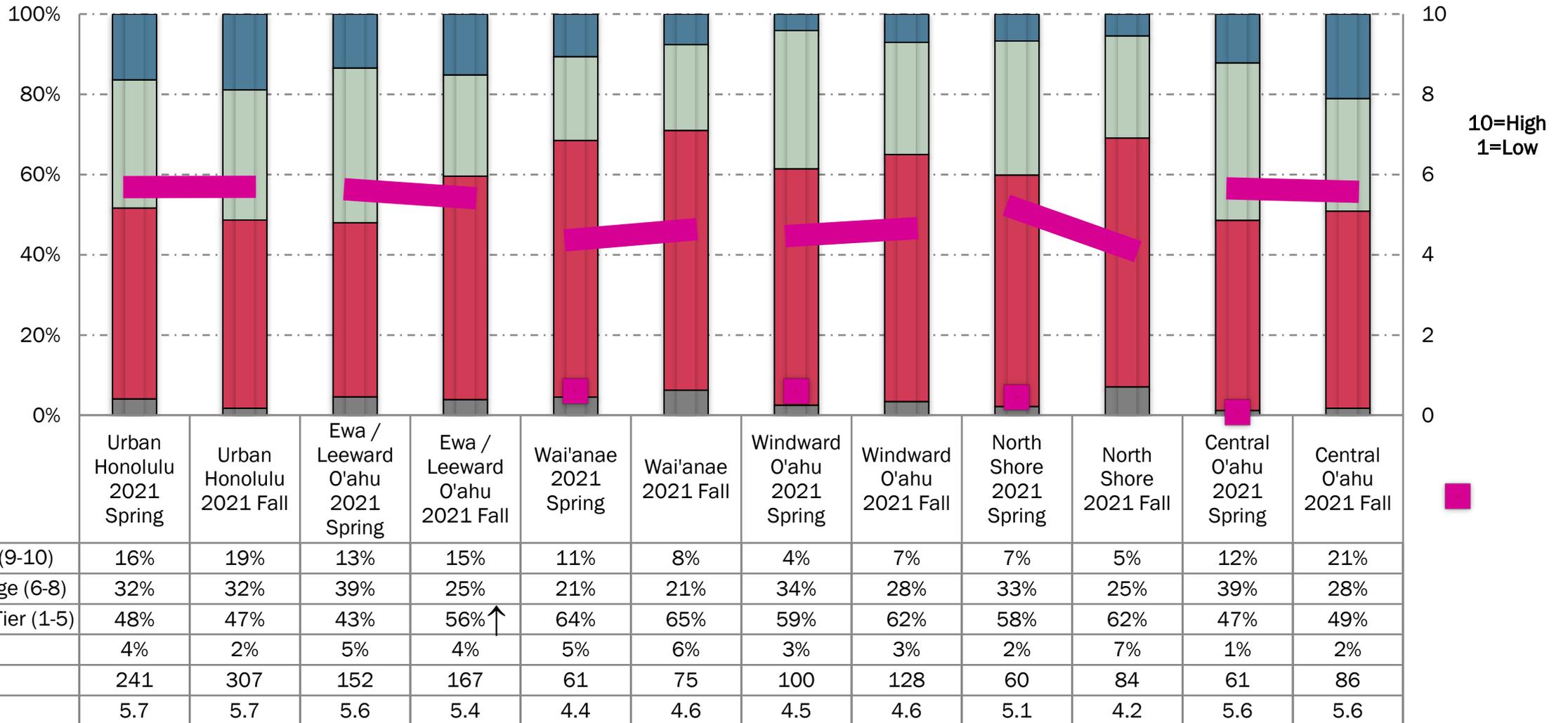
Q3.6. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



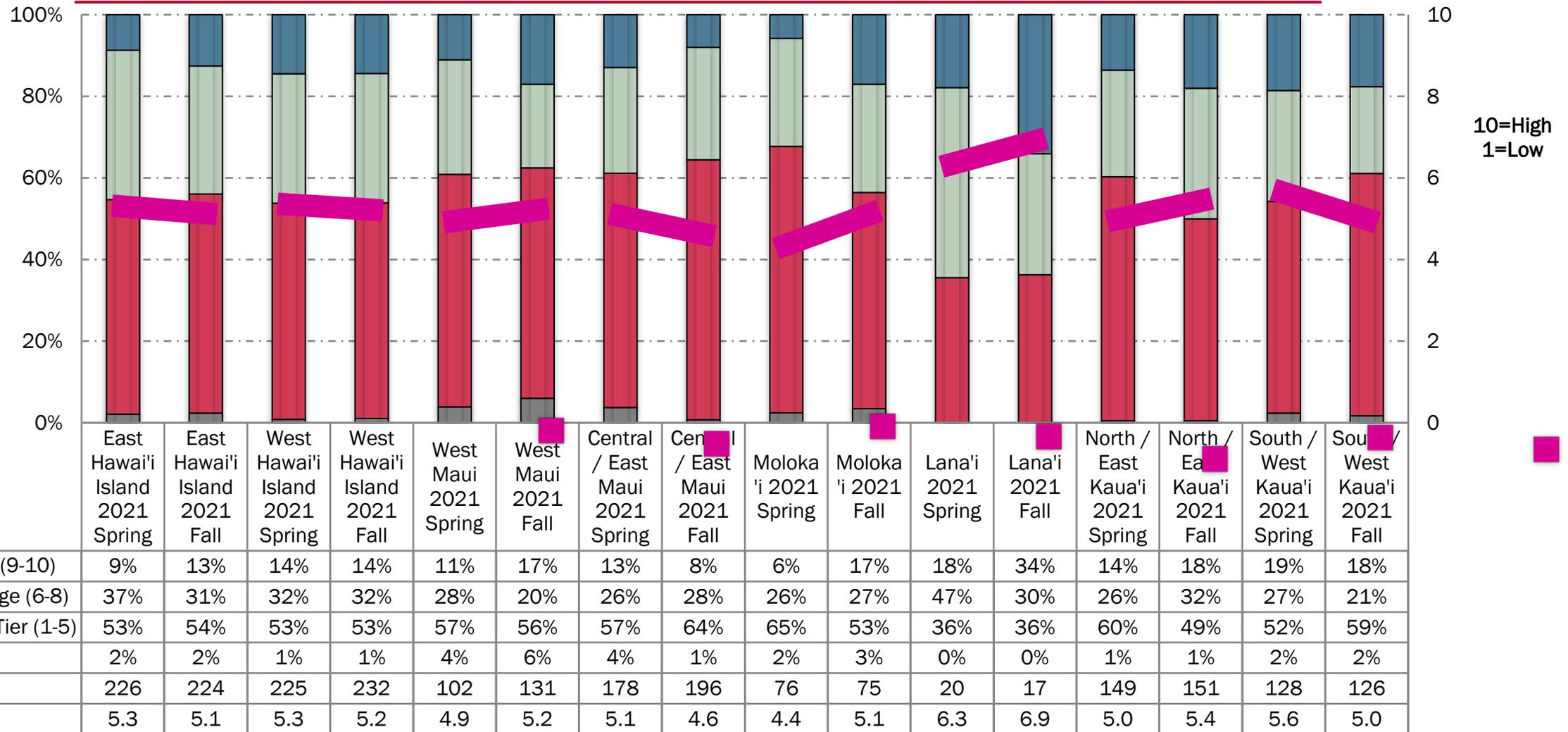
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“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...?

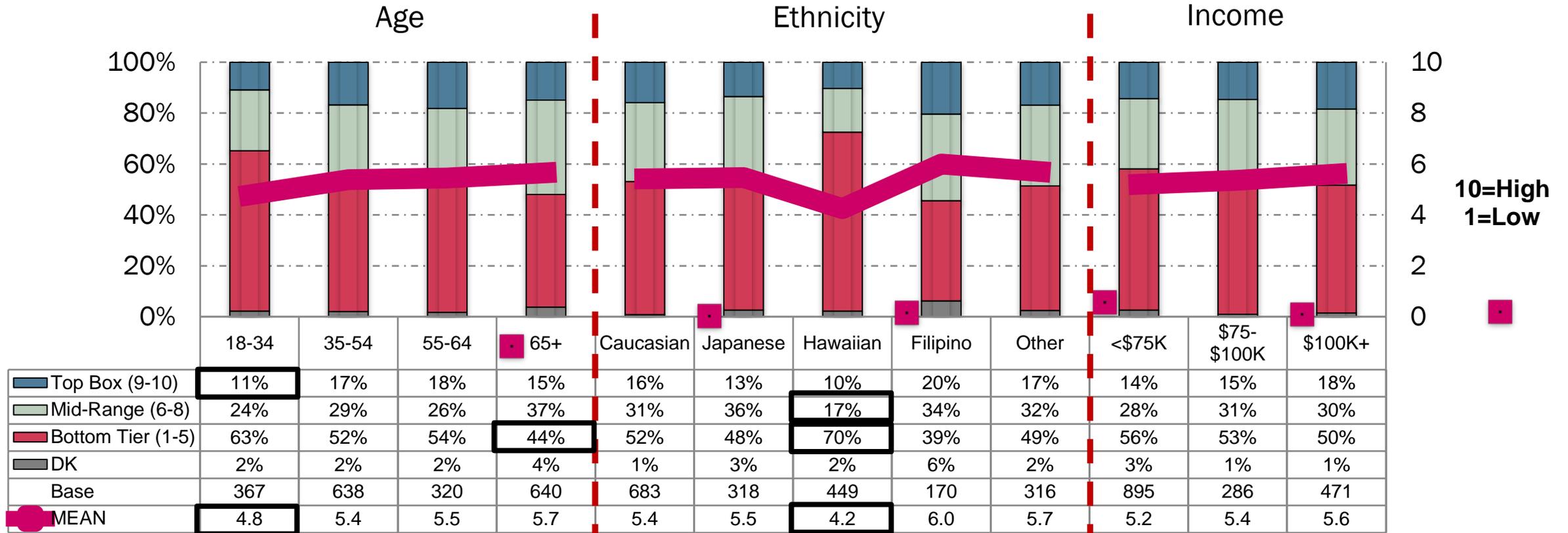
“Is an industry that enhances residents’ quality of life” – By Area (Hawai‘i Island, Maui, & Kaua‘i)



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.

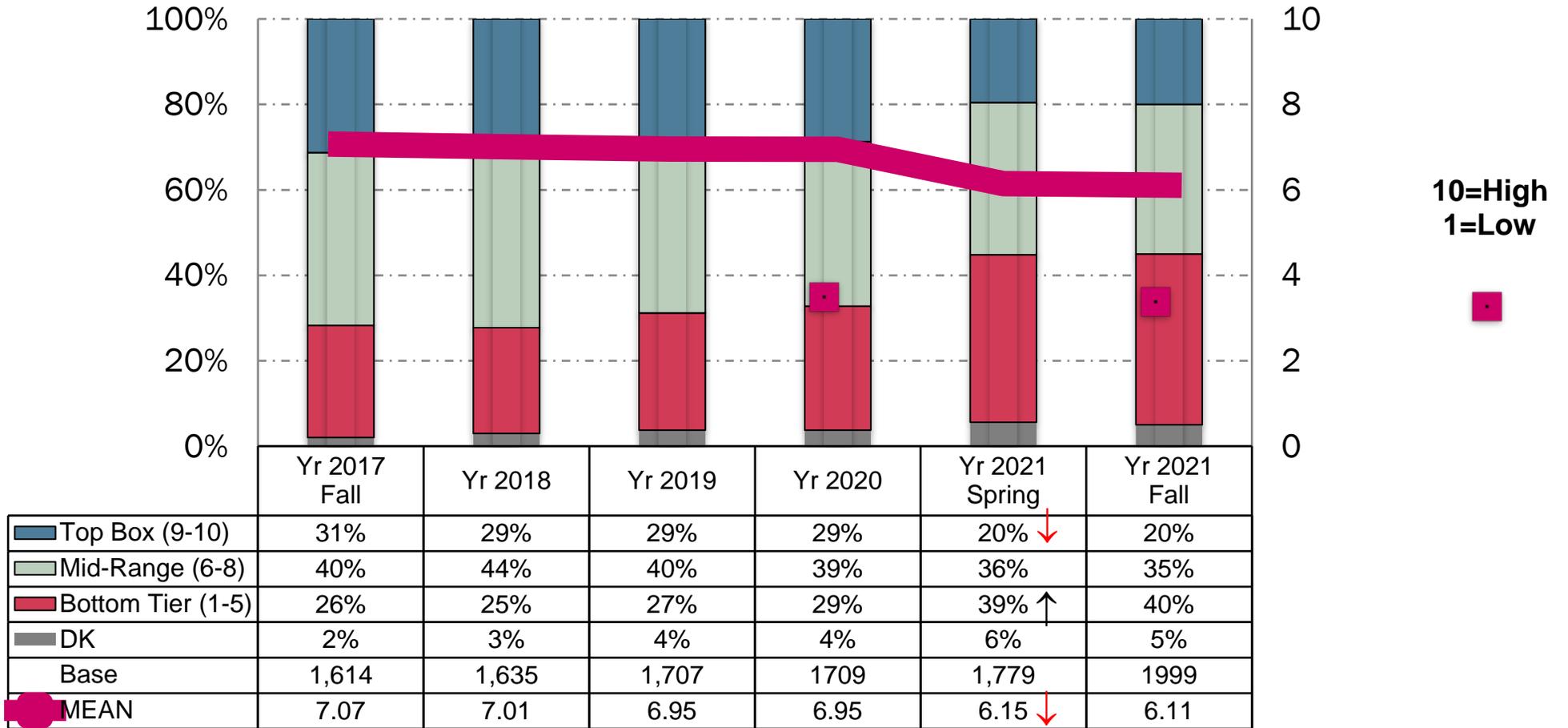
“Is an industry that enhances residents’ quality of life”

– *By Demographics*



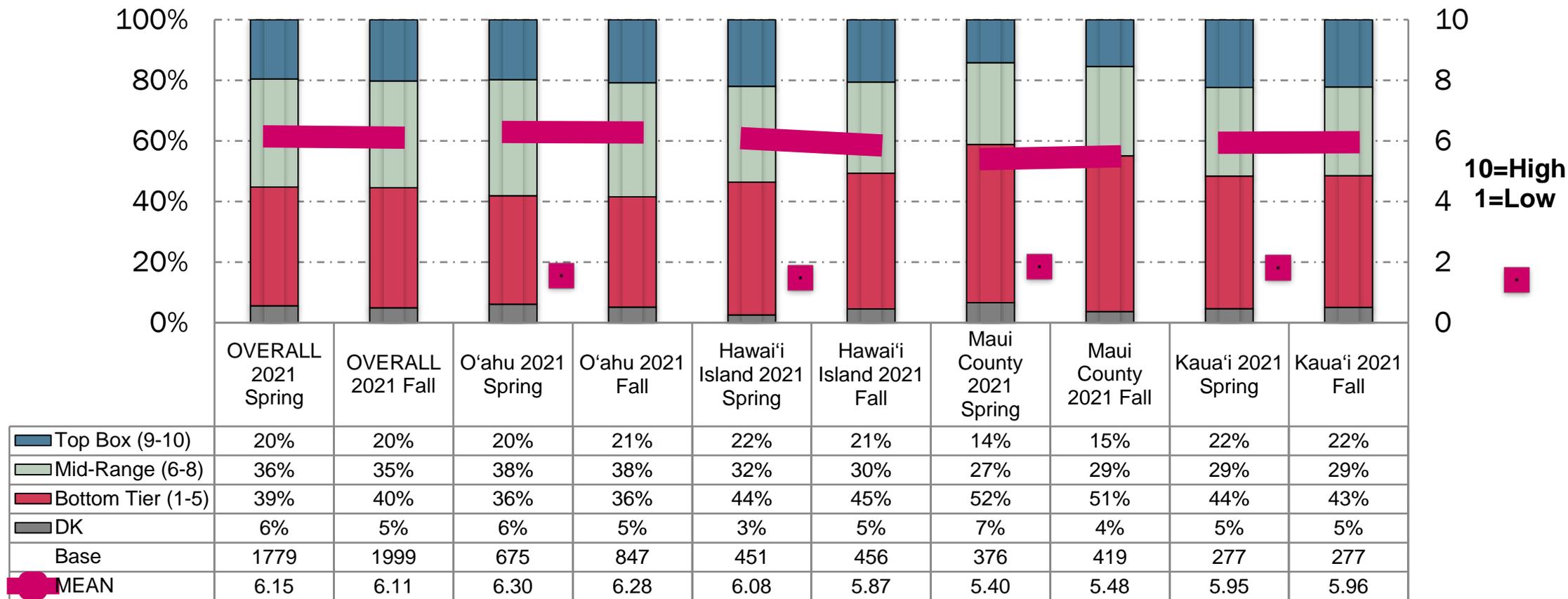
Q3.6. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



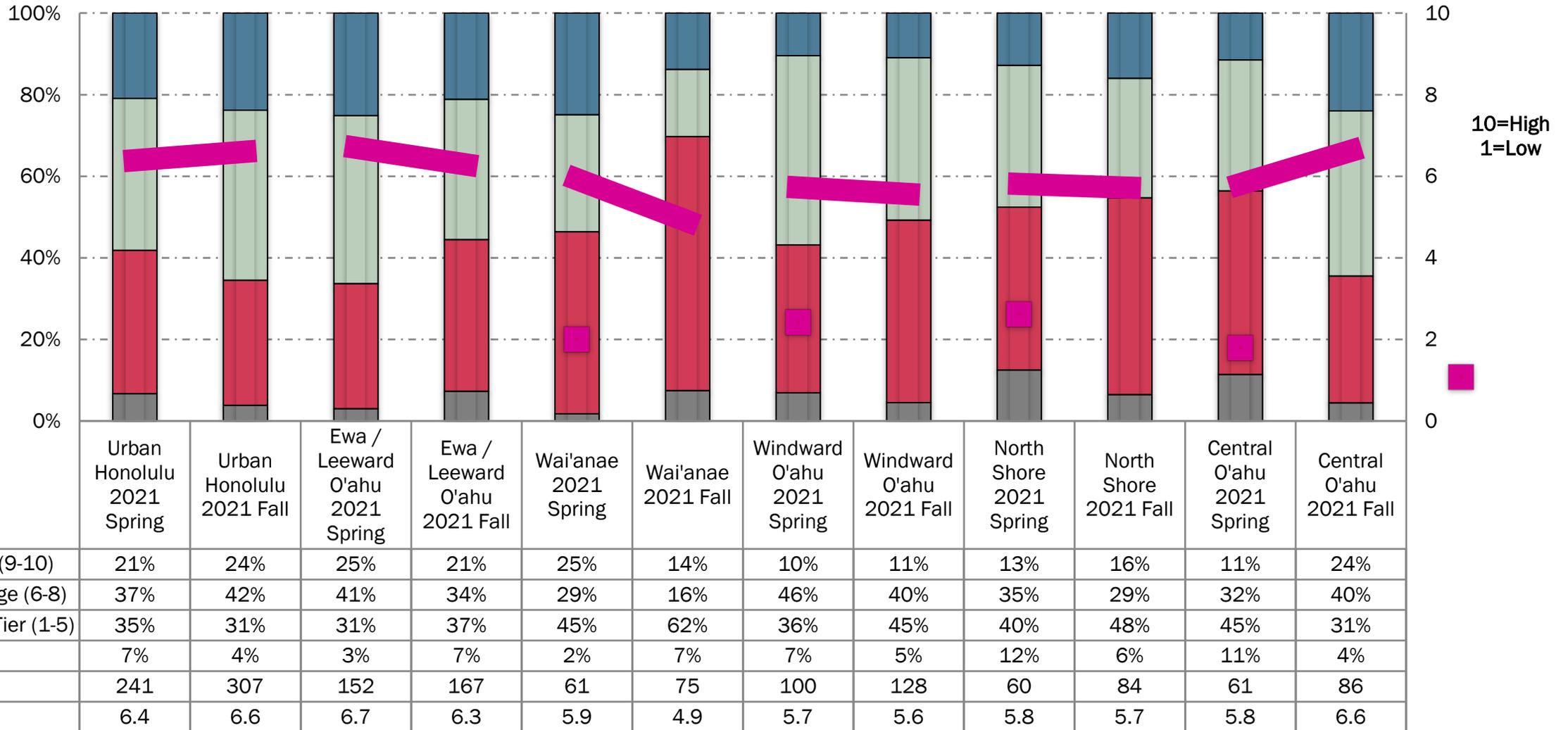
Q3.7. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



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...?

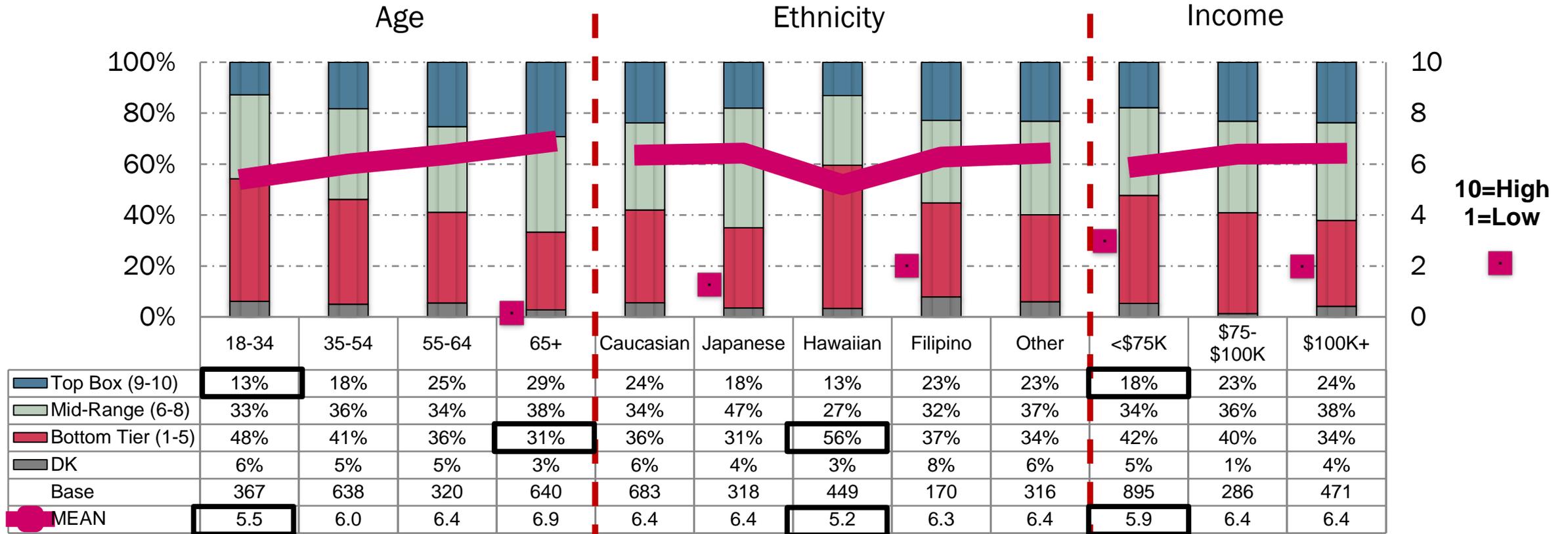
“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



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.

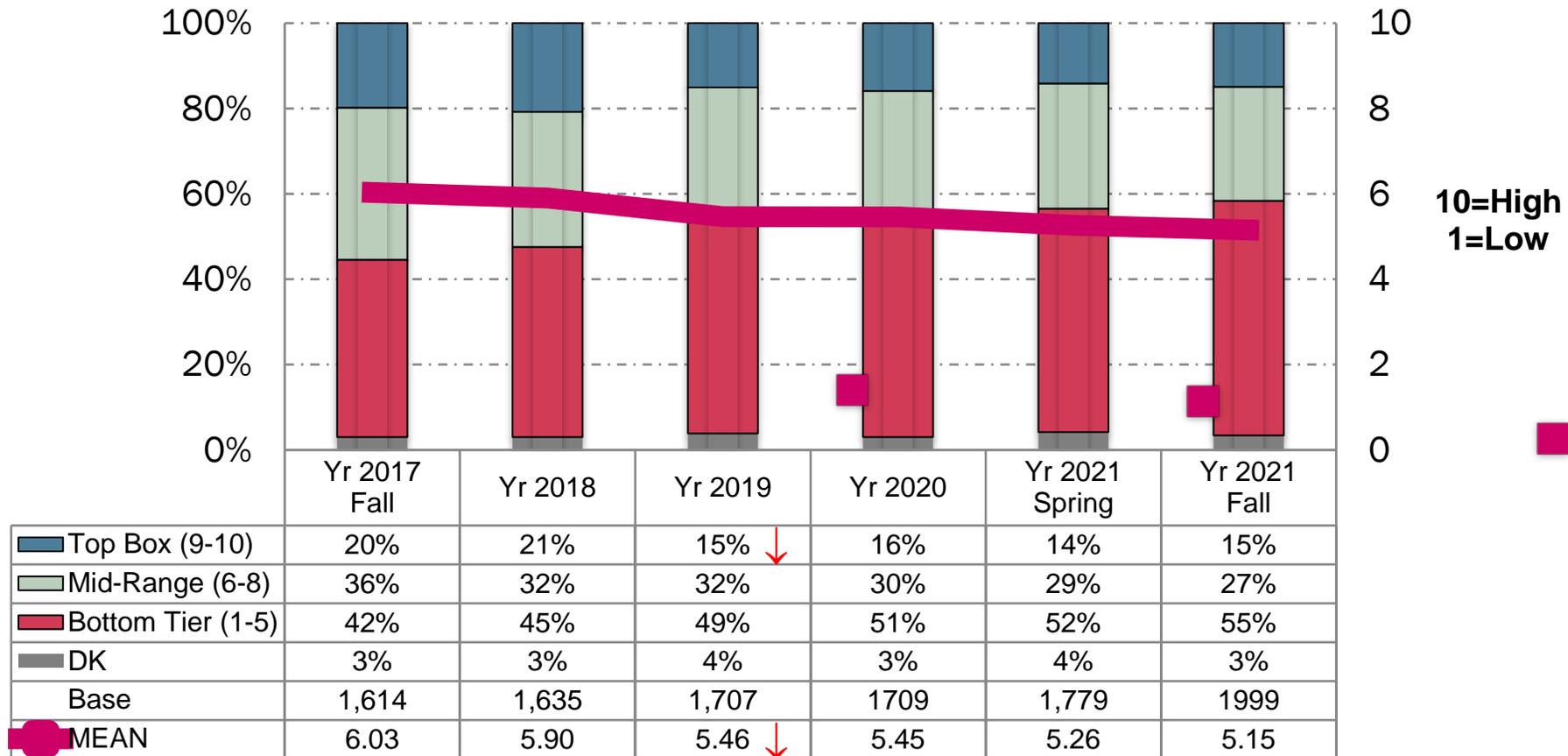
“Sponsors festivals, activities & sports events for residents & visitors”

– *By Demographics*



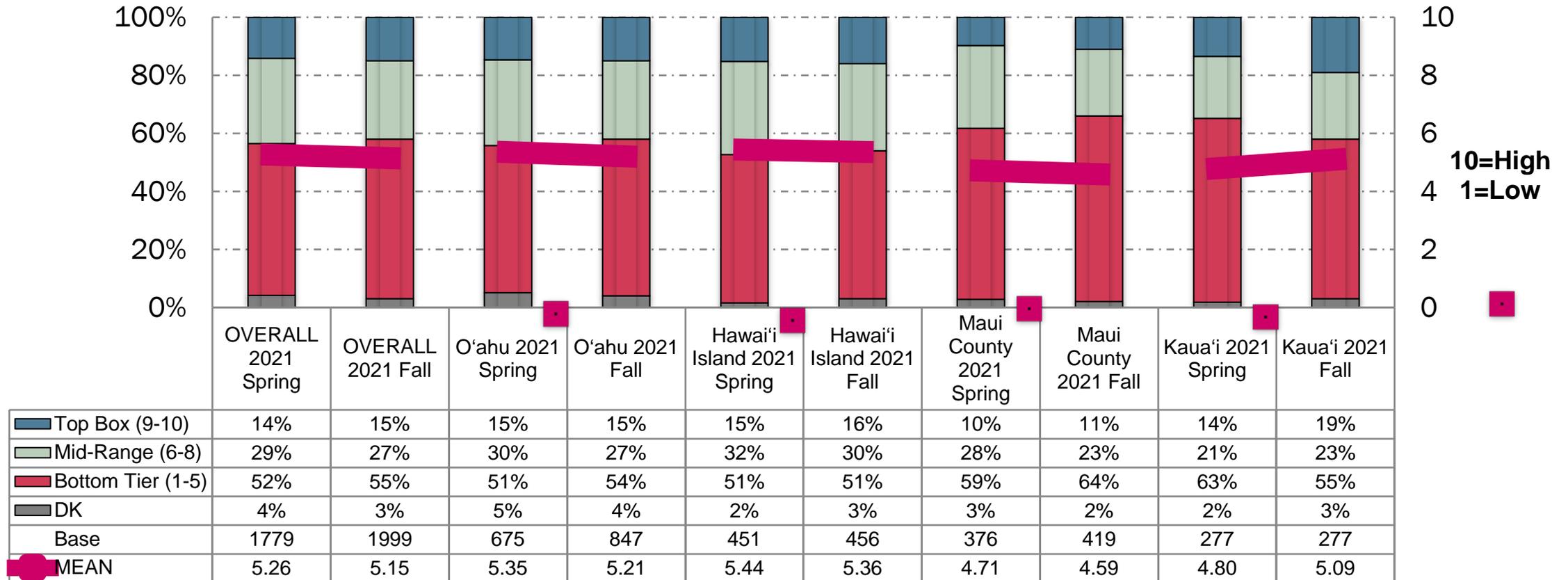
Q3.7. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Helps sustain Hawai'i’s natural resources, parks, and cultural sites” - Overall



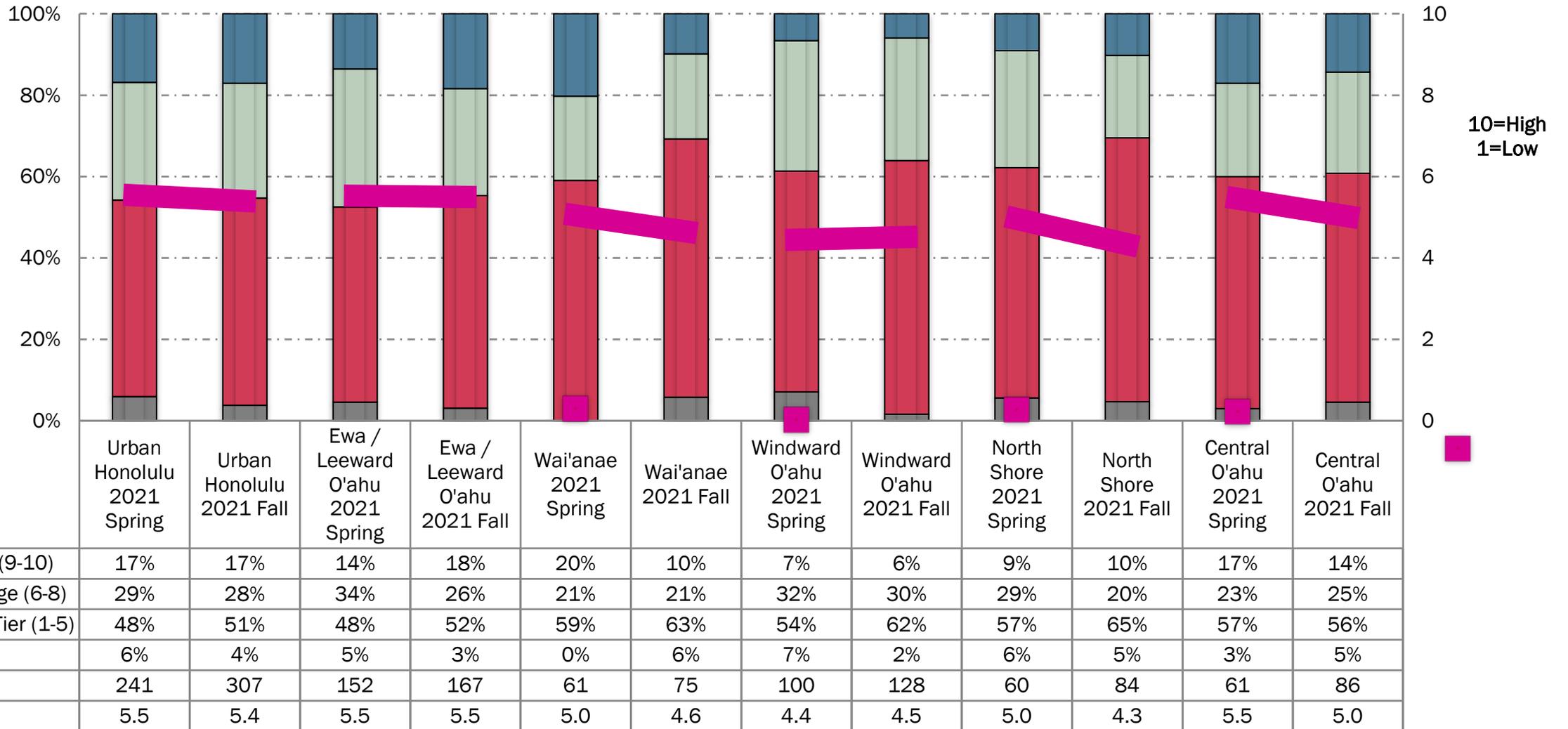
Q3.5. I’m going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Helps sustain Hawai'i’s natural resources, parks, and cultural sites” – *By Island*



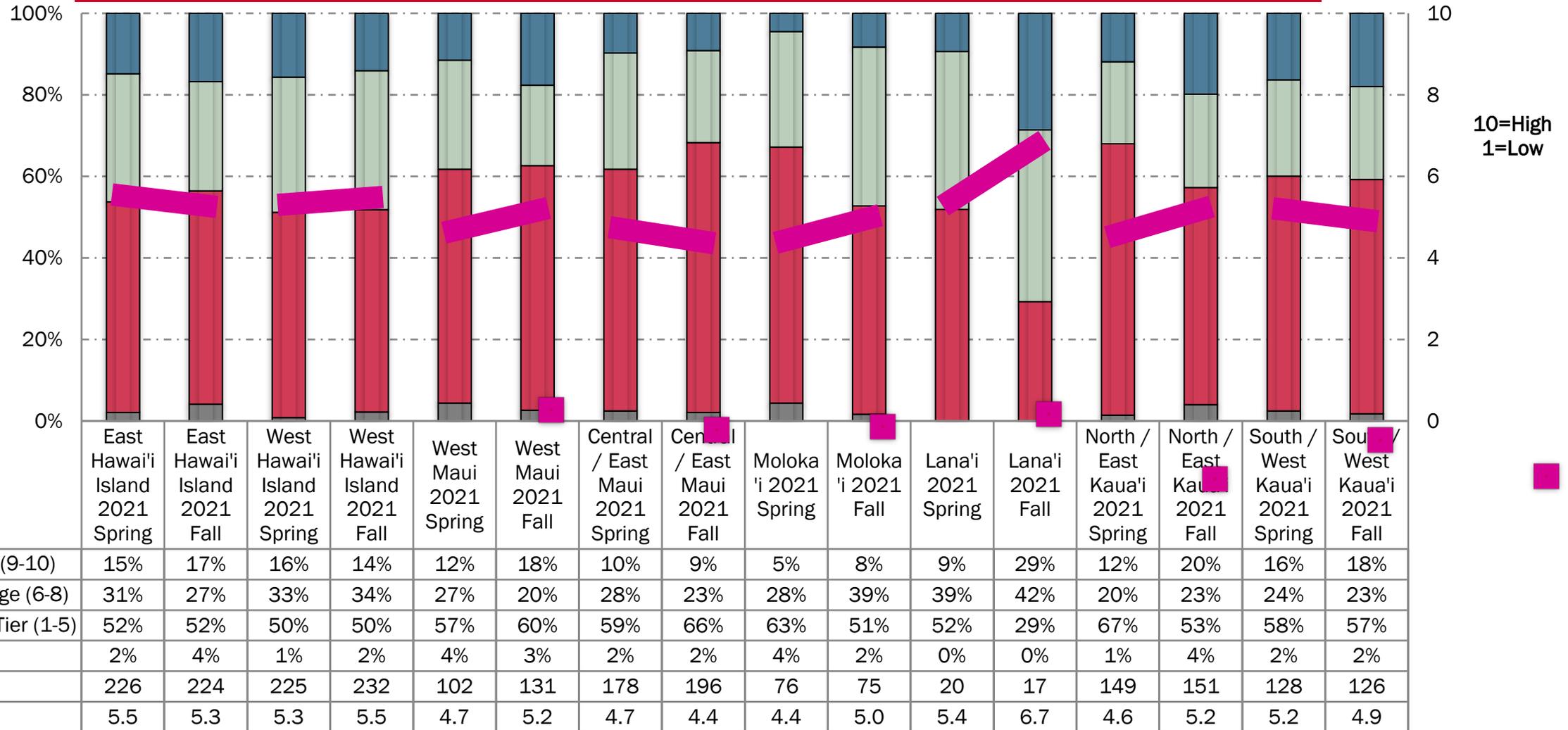
Q3.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Helps sustain Hawai'i’s natural resources, parks, and cultural sites” – *By Area (O’ahu)*



Q3.5. 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...?

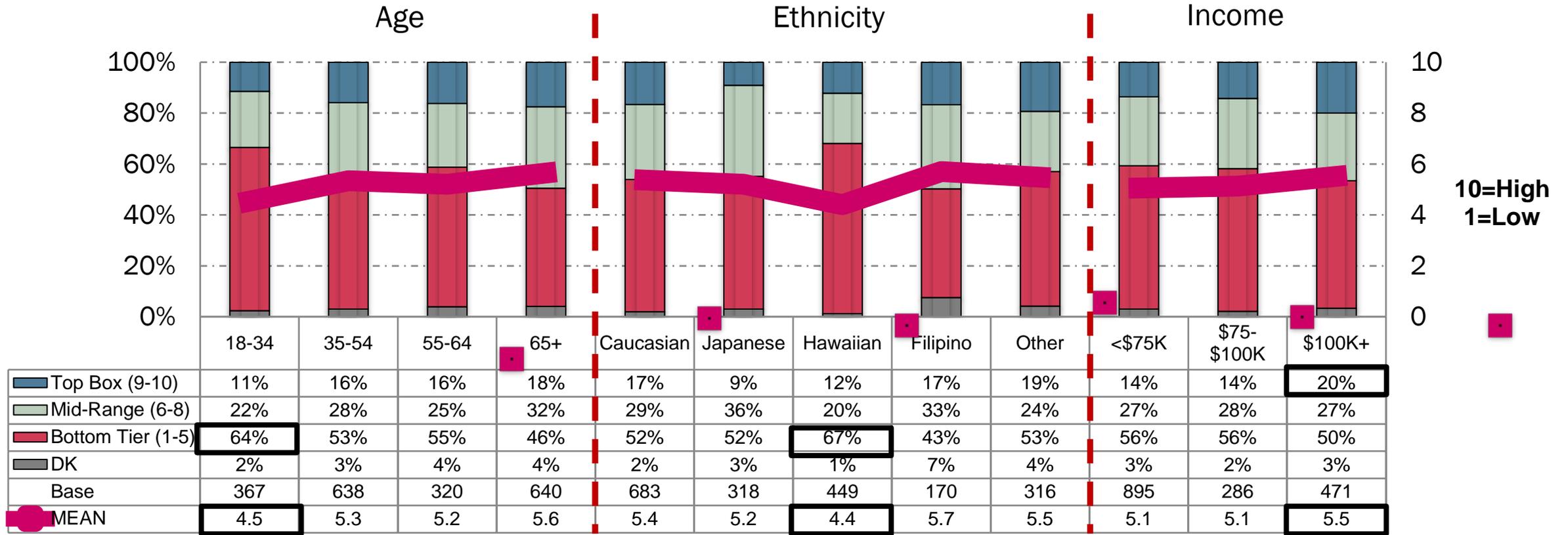
“Helps sustain Hawai‘i’s natural resources, parks, and cultural sites” – By Area (Hawai‘i Island, Maui, & Kaua‘i)



Q3.5. 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...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

“Helps sustain Hawai‘i’s natural resources, parks & cultural sites”

– *By Demographics*

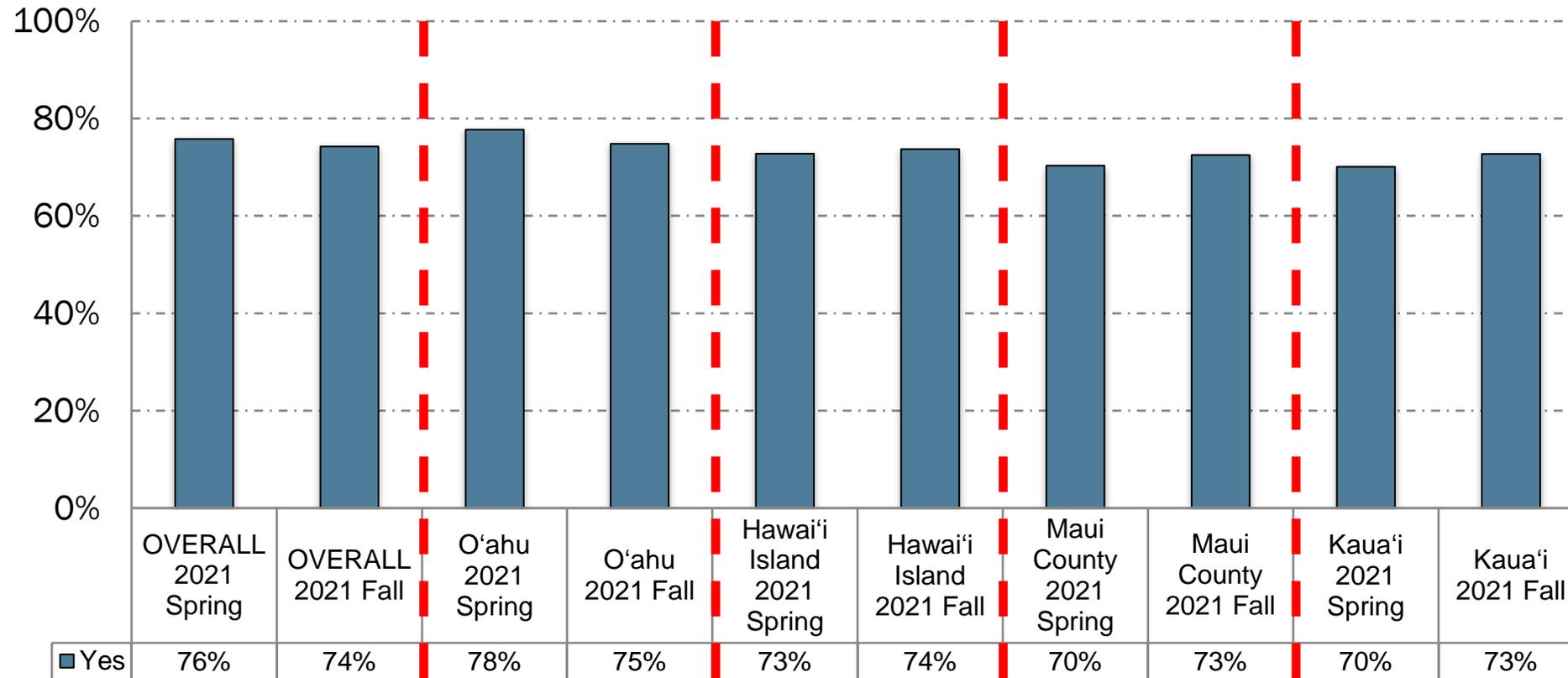


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



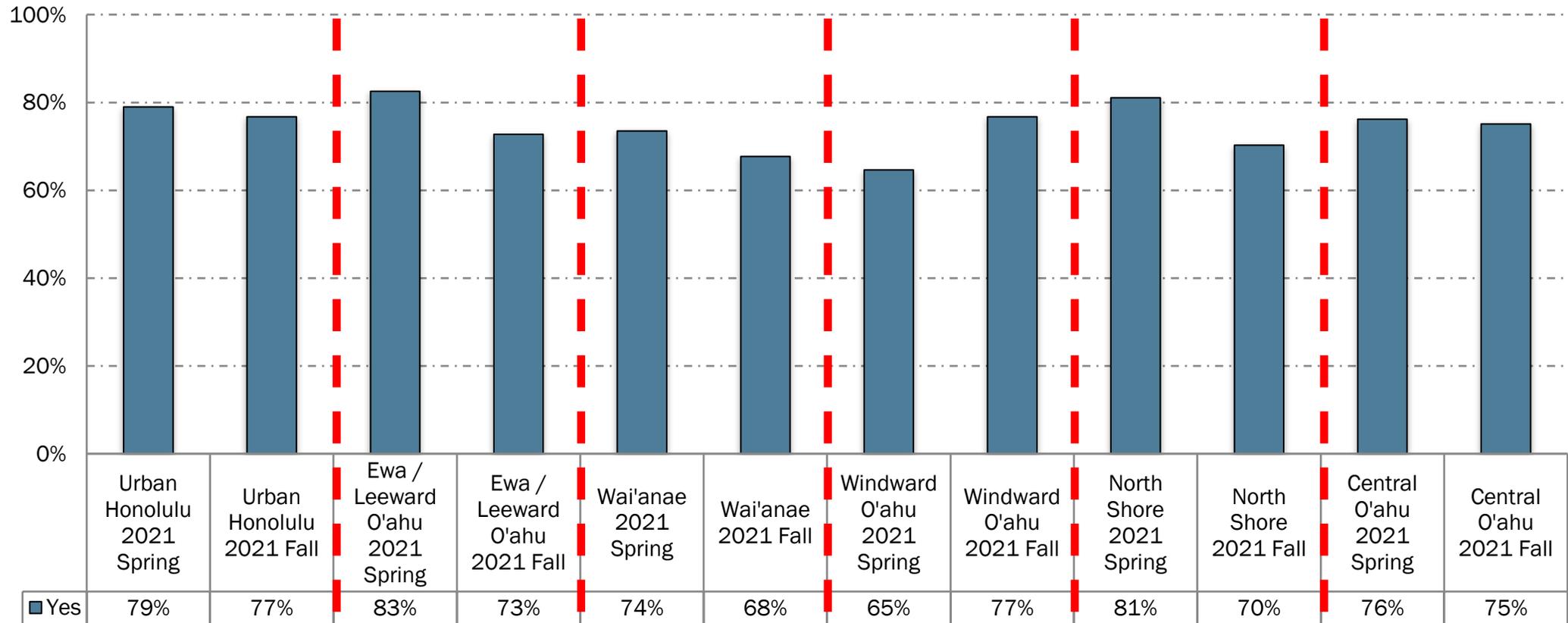
Tourism Worth the Issues (Spring and Fall 2021)

“Do you think tourism is worth the issues associated with the industry?” – *By Island*



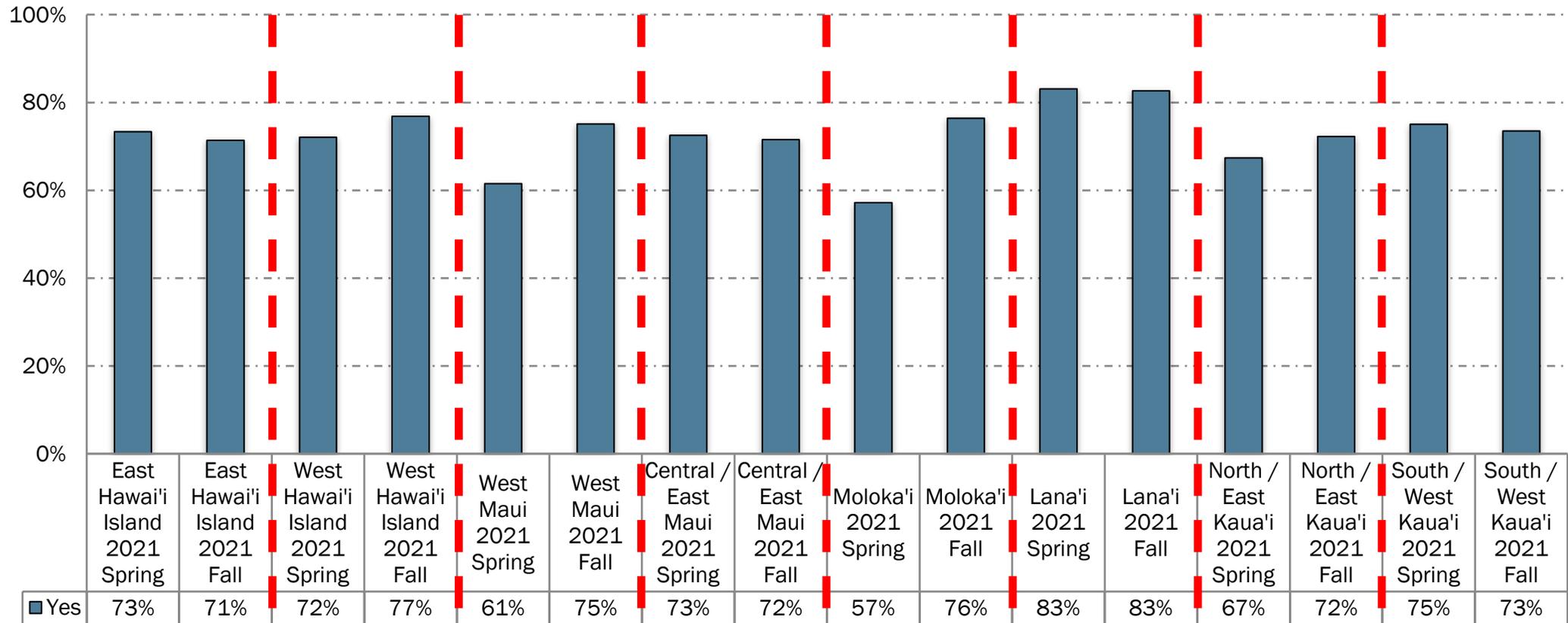
Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“Do you think tourism is worth the issues associated with the industry?” - *By Area (O‘ahu)*



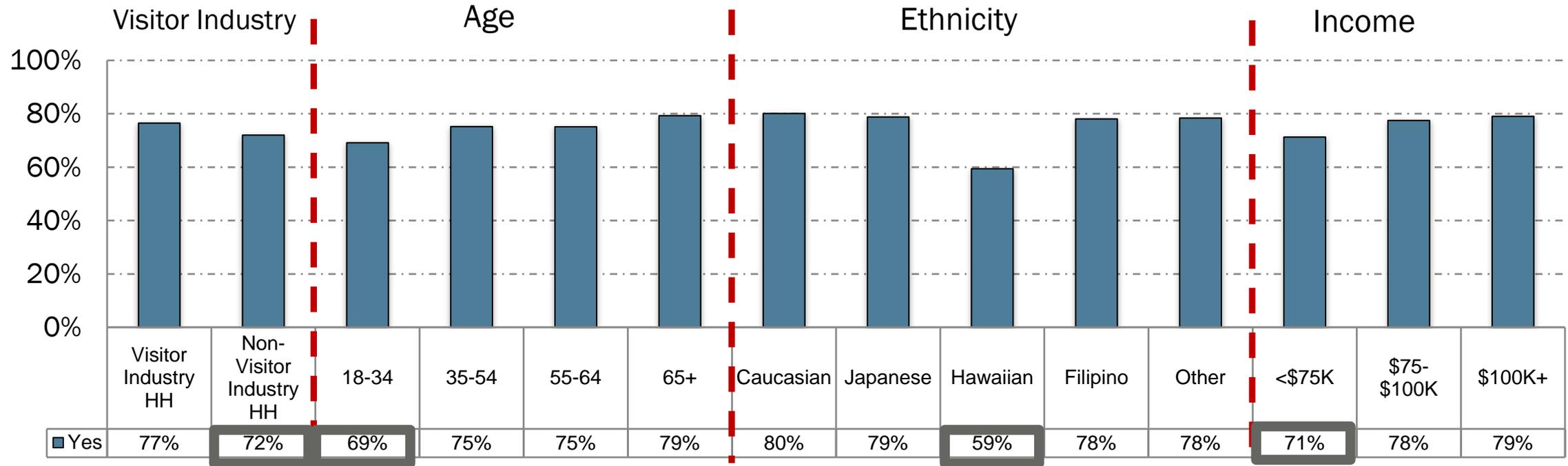
Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“Do you think tourism is worth the issues associated with the industry?” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, 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?

“Do you think tourism is worth the issues associated with the industry?” – *By Demographics*

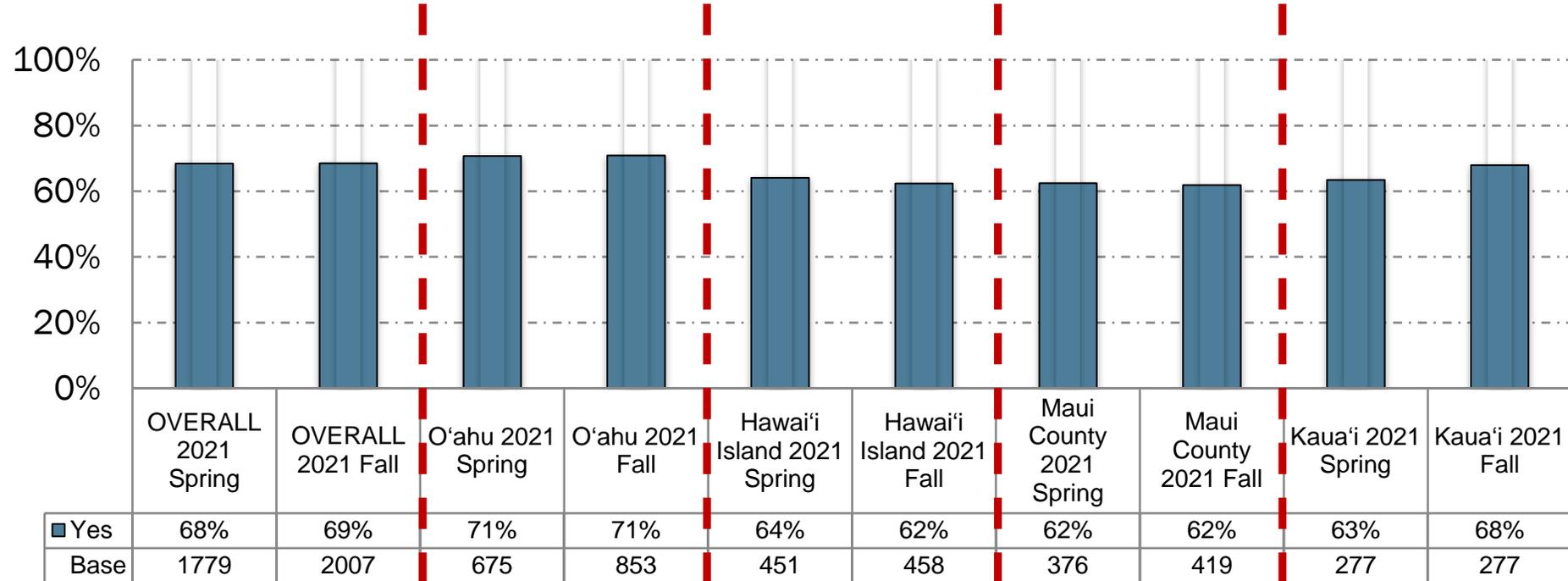


Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?



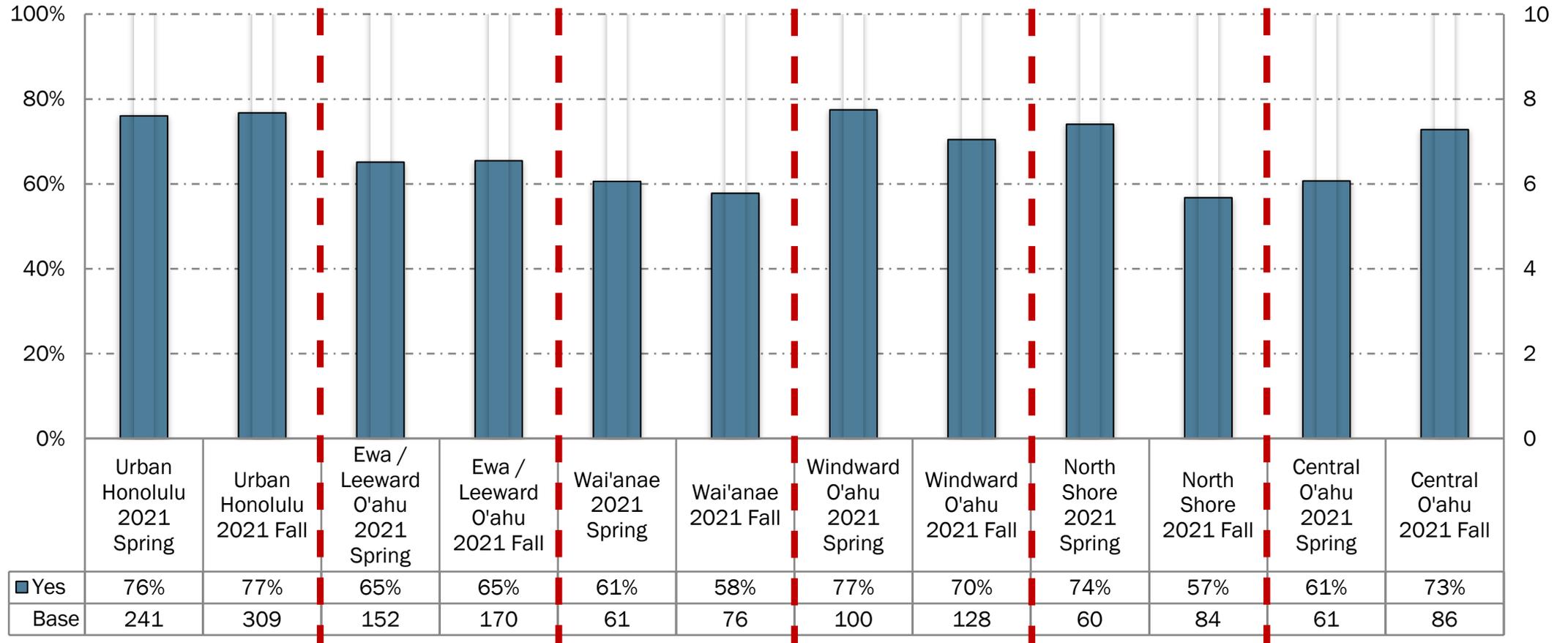
Hawai'i Tourism Authority Perceptions (Spring and Fall 2021)

“Were you aware of the existence of the Hawai'i Tourism Authority [HTA]?” – *By Island*



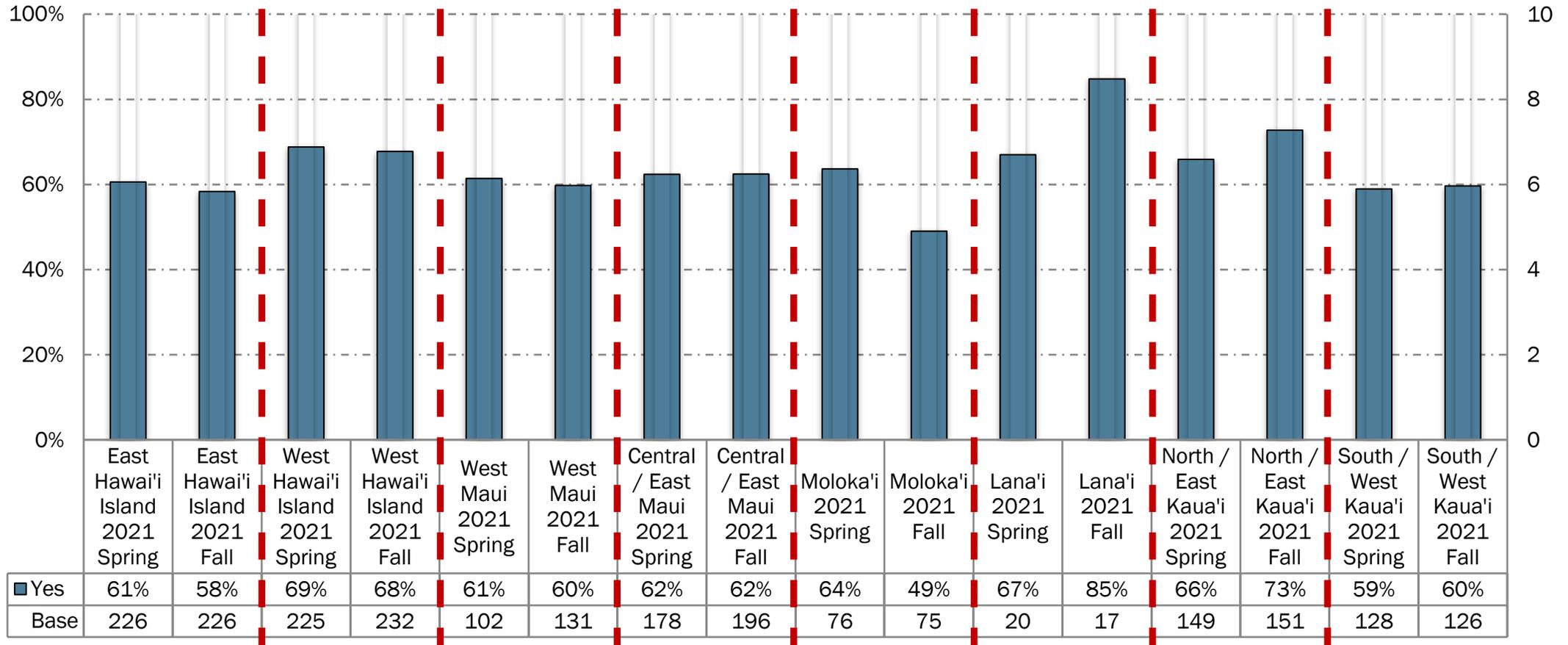
Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority [HTA]?

“Were you aware of the existence of the Hawai'i Tourism Authority [HTA]?” - *By Area (O'ahu)*



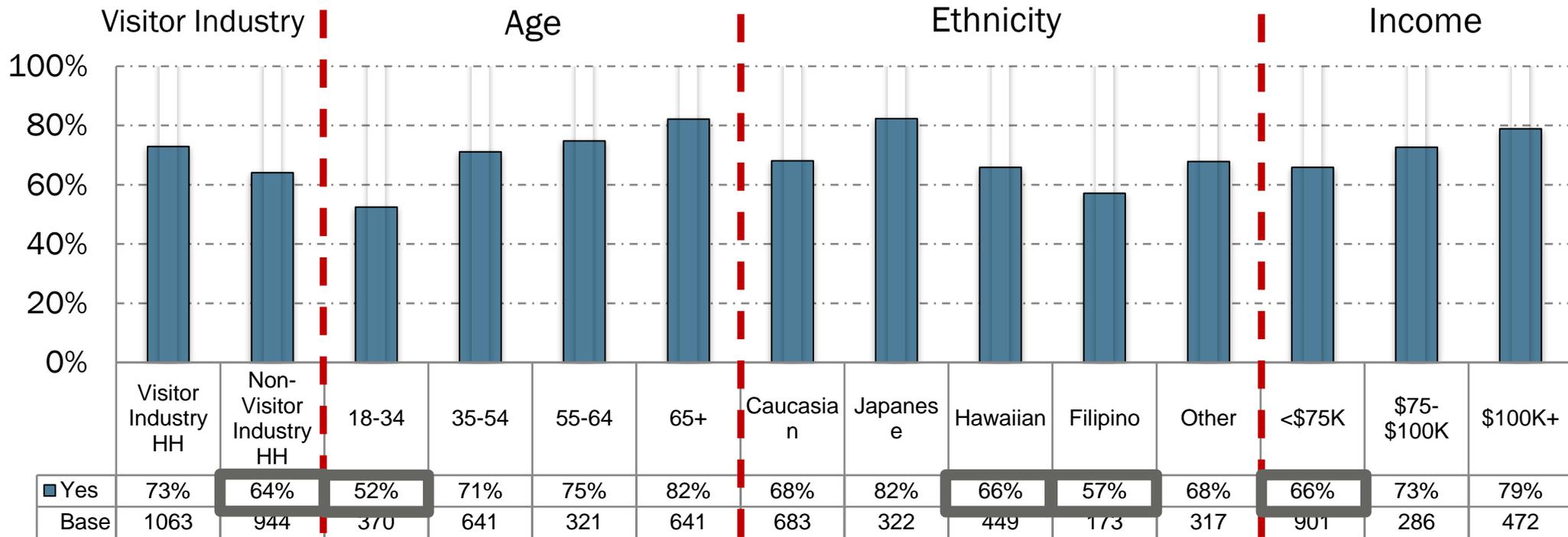
Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority [HTA]?

“Were you aware of the existence of the Hawai'i Tourism Authority [HTA]?” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



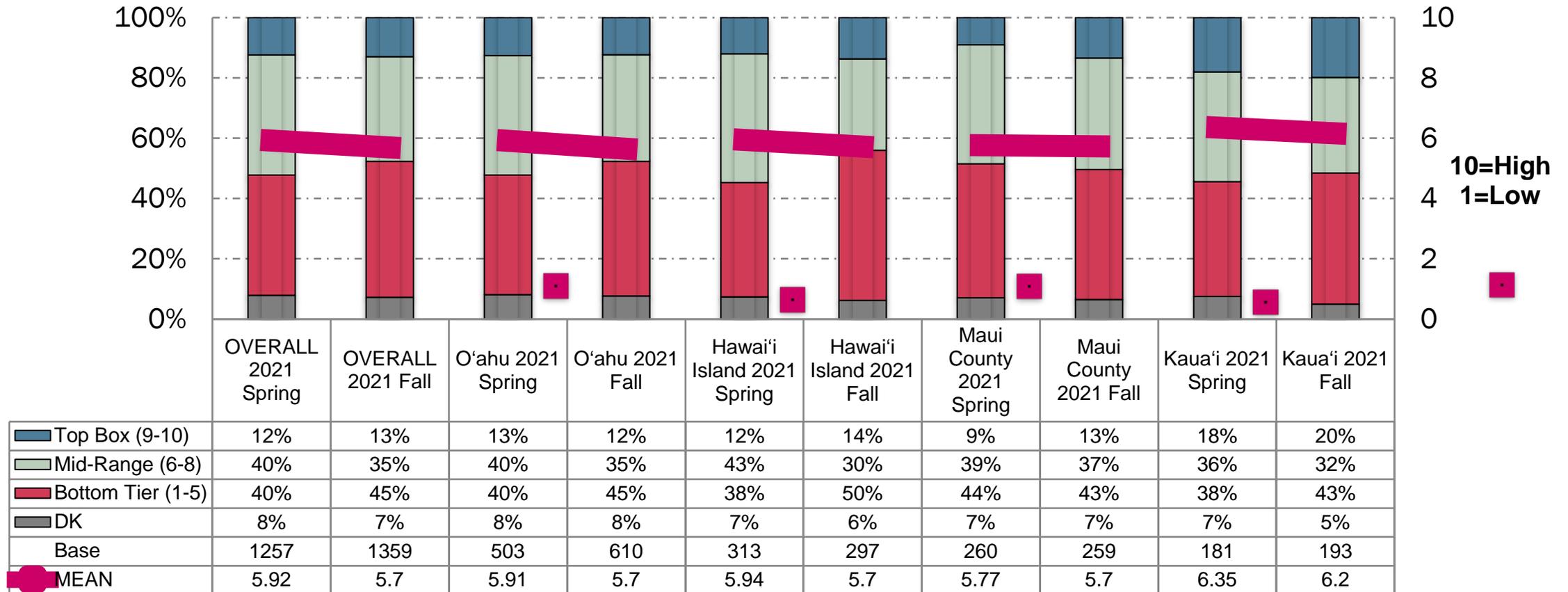
Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority [HTA]?

“Were you aware of the existence of the Hawai'i Tourism Authority [HTA]?” *By Demographics*



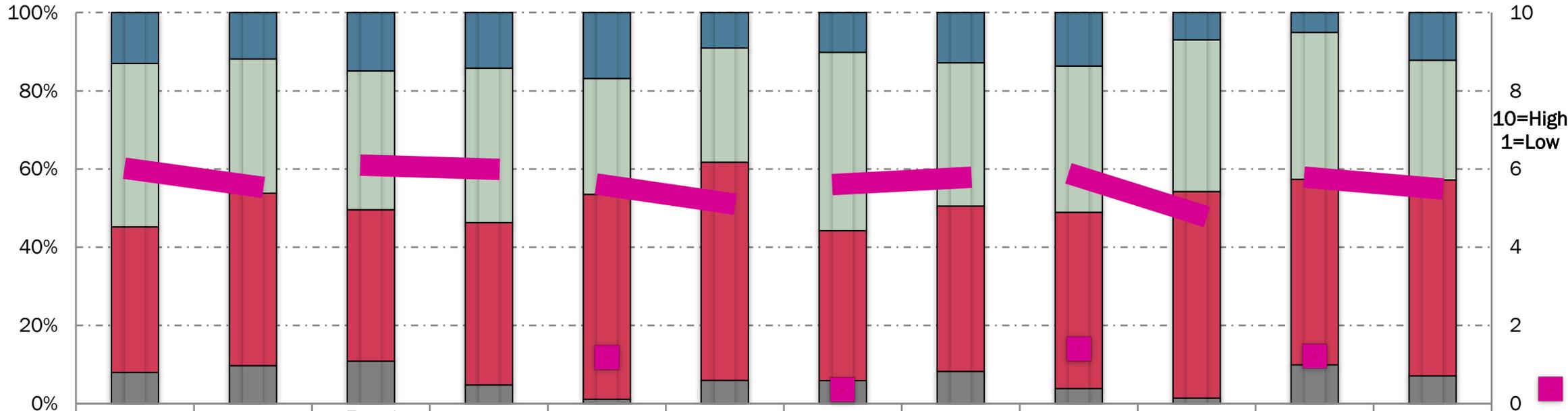
Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority [HTA]?

HTA Overall Favorability - *By Island*



Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

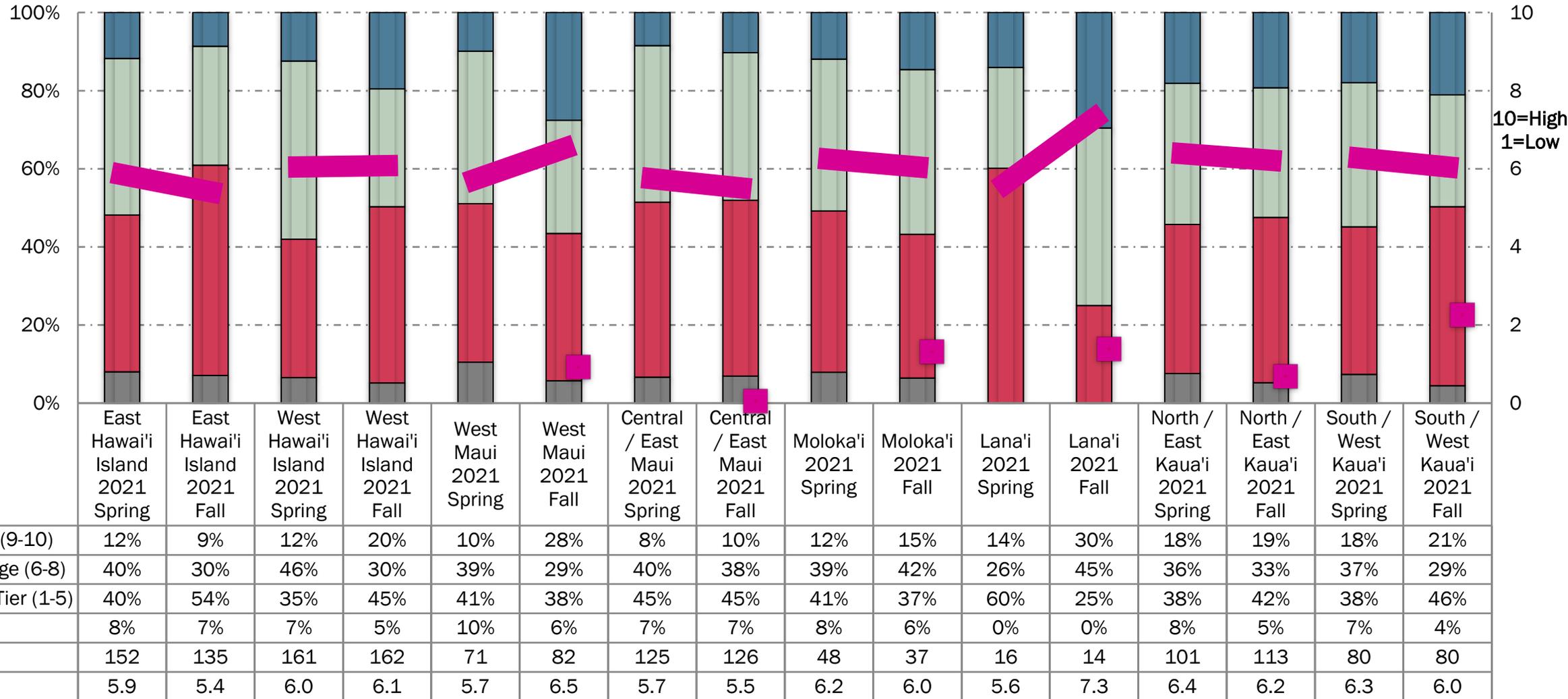
HTA Overall Favorability - *By Area (O'ahu)*



	Urban Honolulu 2021 Spring	Urban Honolulu 2021 Fall	Ewa / Leeward O'ahu 2021 Spring	Ewa / Leeward O'ahu 2021 Fall	Wai'anae 2021 Spring	Wai'anae 2021 Fall	Windward O'ahu 2021 Spring	Windward O'ahu 2021 Fall	North Shore 2021 Spring	North Shore 2021 Fall	Central O'ahu 2021 Spring	Central O'ahu 2021 Fall
■ Top Box (9-10)	13%	12%	15%	14%	17%	9%	10%	13%	14%	7%	5%	12%
■ Mid-Range (6-8)	42%	34%	36%	39%	30%	29%	46%	37%	37%	39%	38%	31%
■ Bottom Tier (1-5)	37%	44%	39%	42%	52%	56%	38%	42%	45%	53%	47%	50%
■ DK/Rf	8%	10%	11%	5%	1%	6%	6%	8%	4%	1%	10%	7%
Base	190	241	107	115	40	48	82	95	45	48	39	63
MEAN	6.0	5.6	6.1	6.0	5.6	5.1	5.6	5.8	5.8	4.9	5.8	5.5

Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

HTA Overall Favorability - *By Area (Hawai'i Island, Maui, & Kaua'i)*



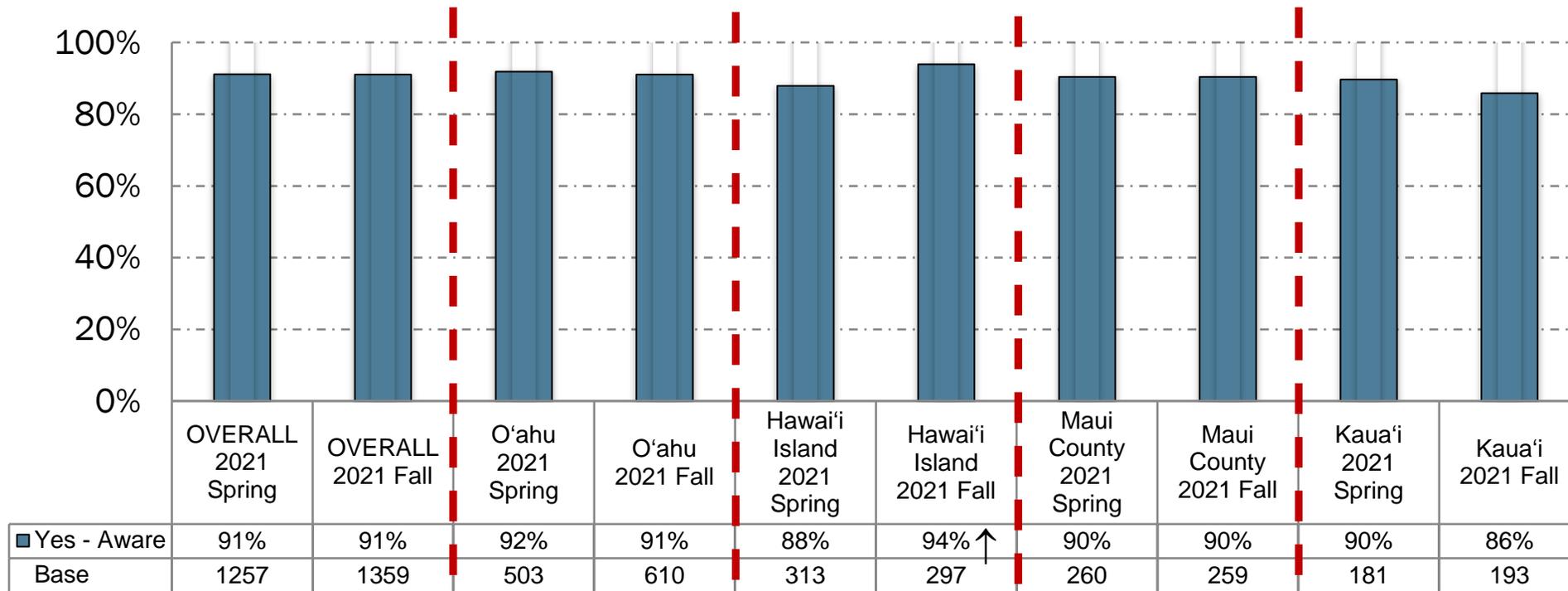
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HTA Overall Favorability - *By Demographics*



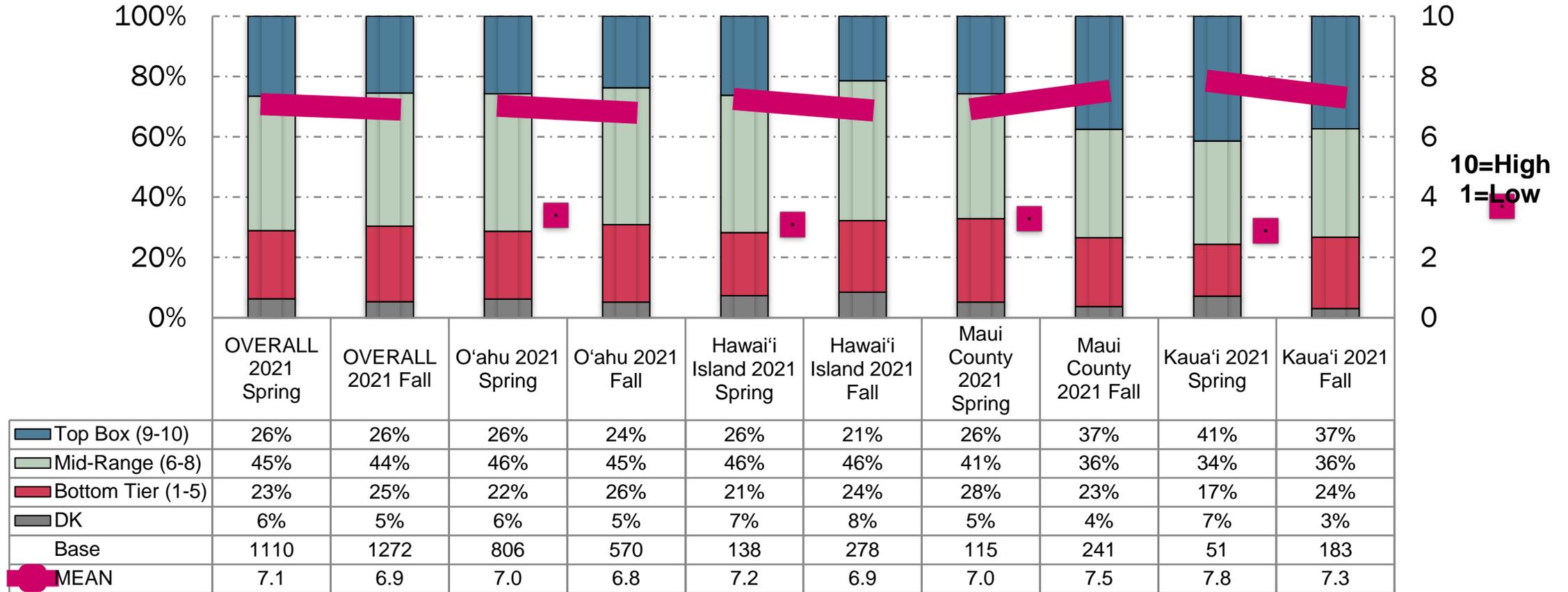
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

HTA: Aware of Marketing and promoting travel to Hawai'i- *By Island*



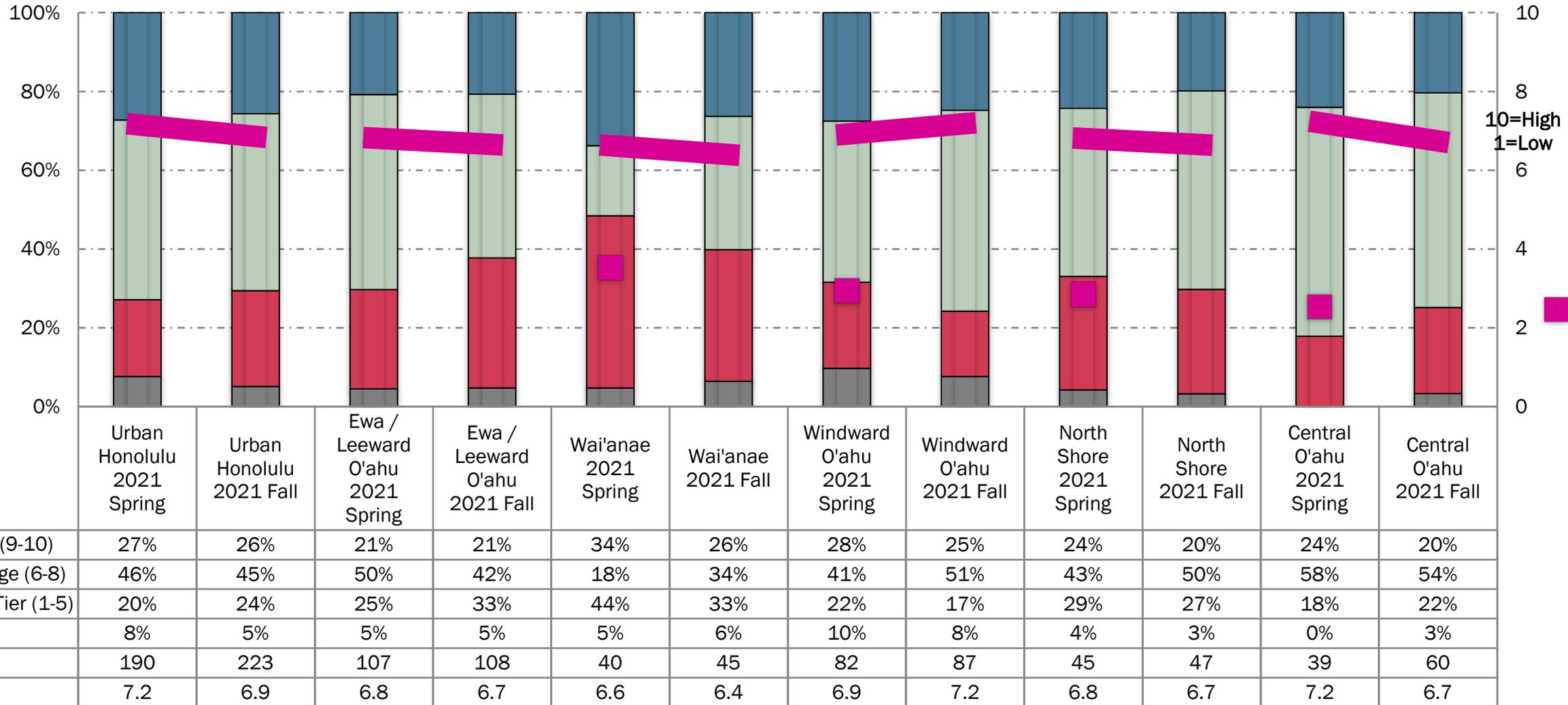
Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

HTA: Perception Marketing and promoting travel to Hawai'i- *By Island*



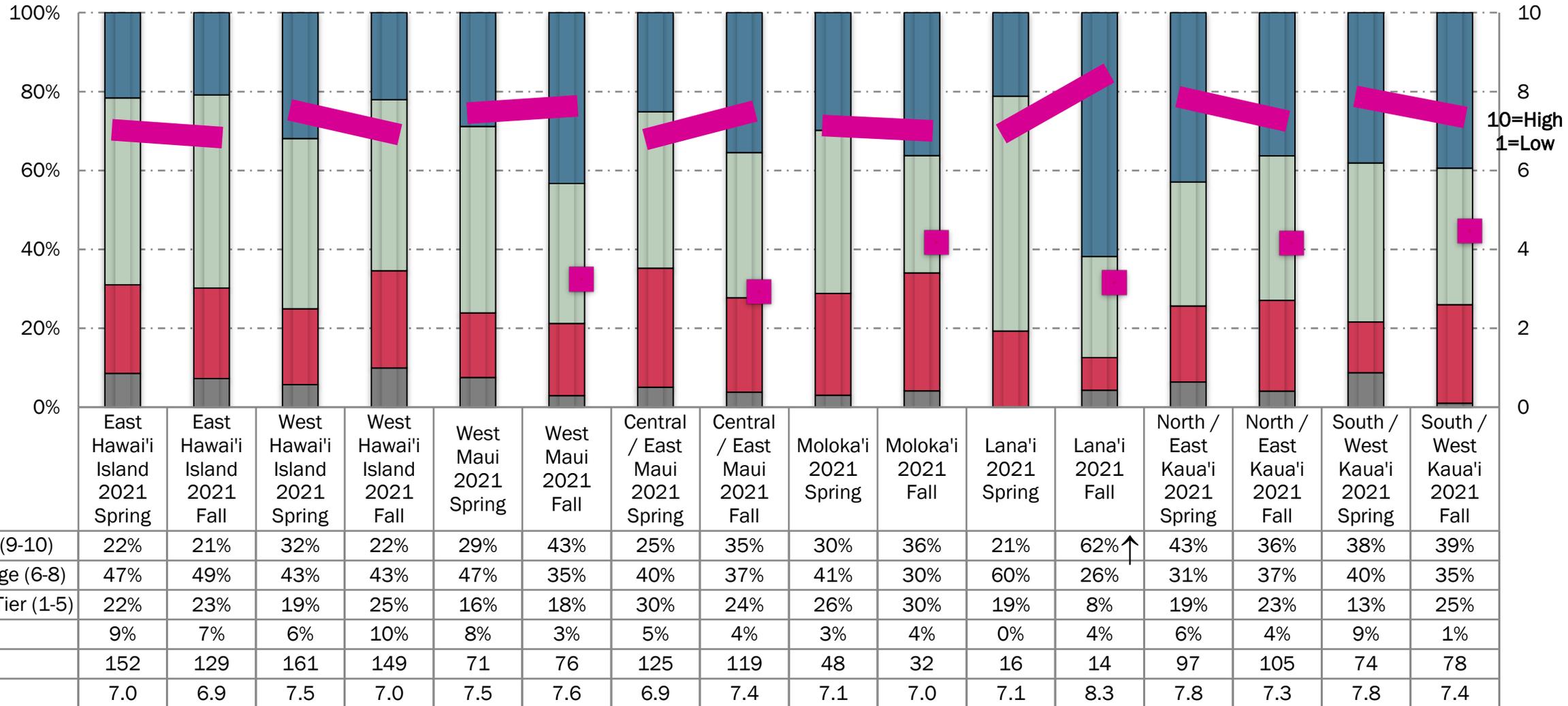
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

Marketing and promoting travel to Hawai'i - *By Area (O'ahu)*



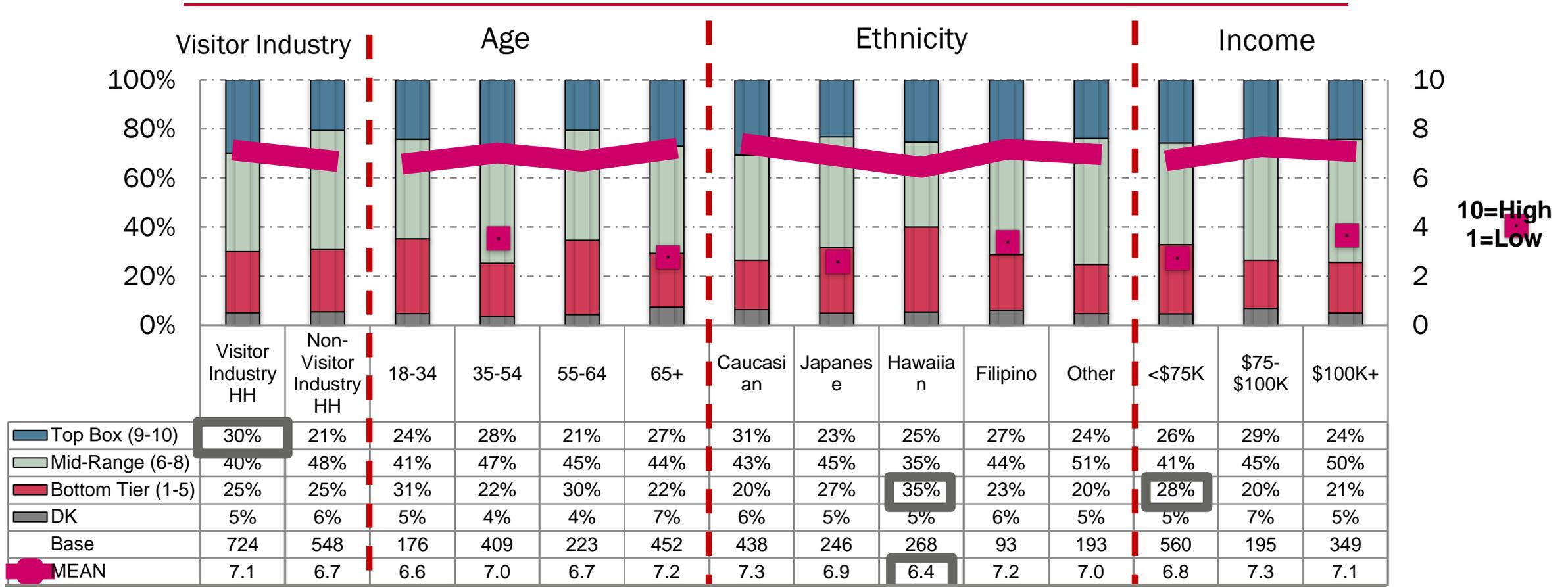
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Marketing and promoting travel to Hawai'i - *By Area (Hawai'i Island, Maui, & Kaua'i)*



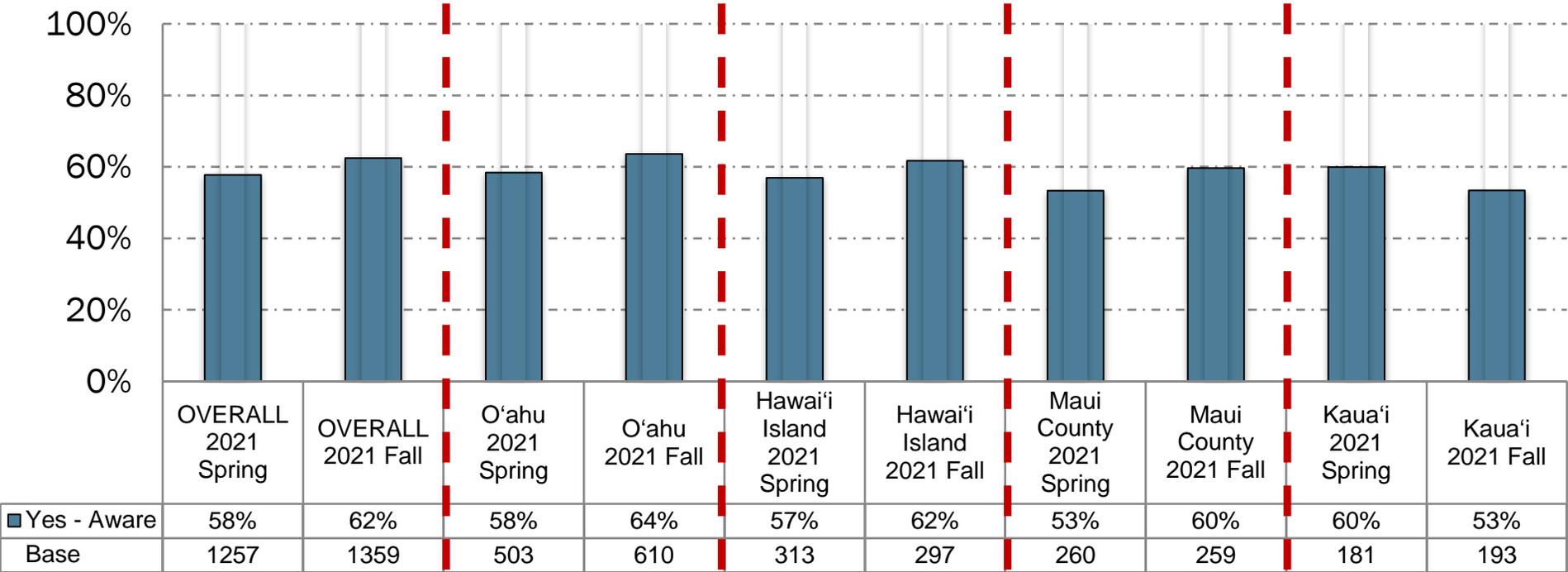
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“Marketing and promoting travel to Hawai'i” – *By Demographics*



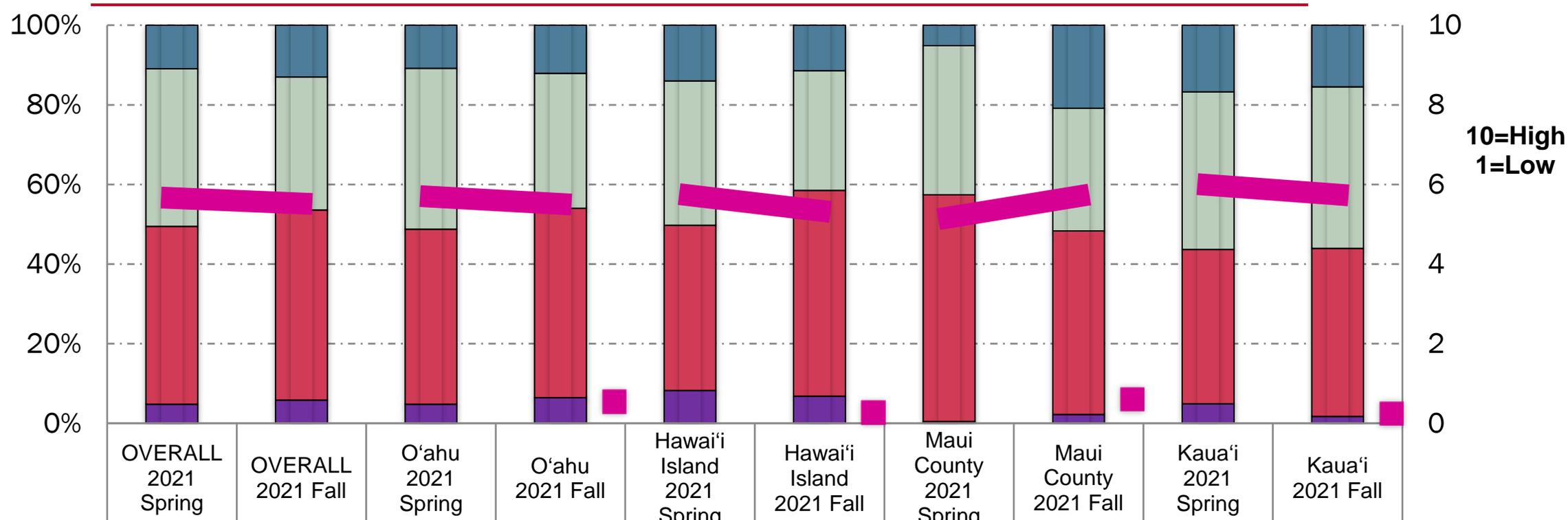
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HTA: Aware Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

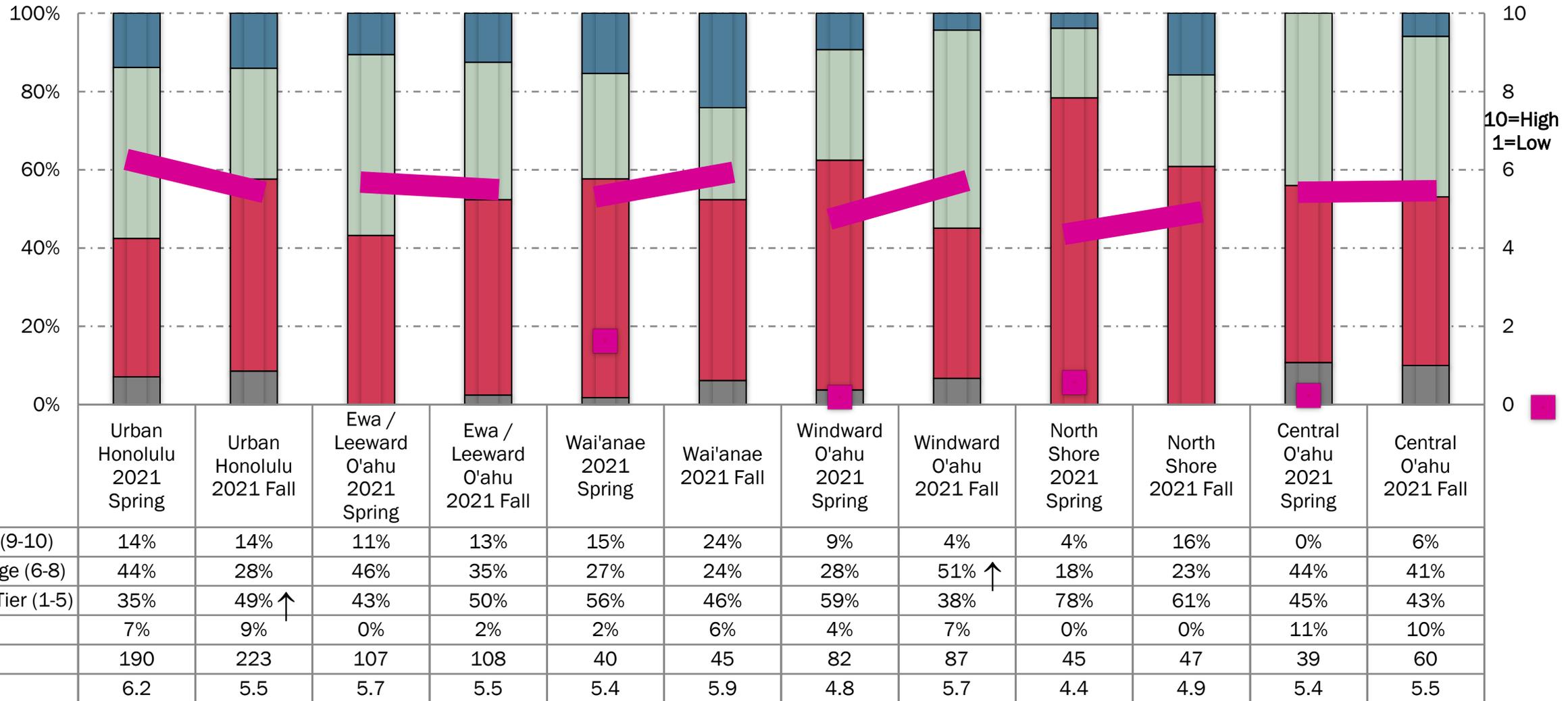
“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” – *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
■ Top Box (9-10)	11%	13%	11%	12%	14%	11%	5%	21% ↑	17%	15%
■ Mid-Range (6-8)	40%	33%	40%	34%	36%	30%	37%	31%	40%	41%
■ Bottom Tier (1-5)	45%	48%	44%	48%	42%	52%	57%	46%	39%	42%
■ DK/Rf	5%	6%	5%	6%	8%	7%	0%	2%	5%	2%
Base	704	1272	512	570	89	278	68	241	34	183
■ MEAN	5.7	5.5	5.7	5.5	5.7	5.3	5.2	5.7	6.0	5.7

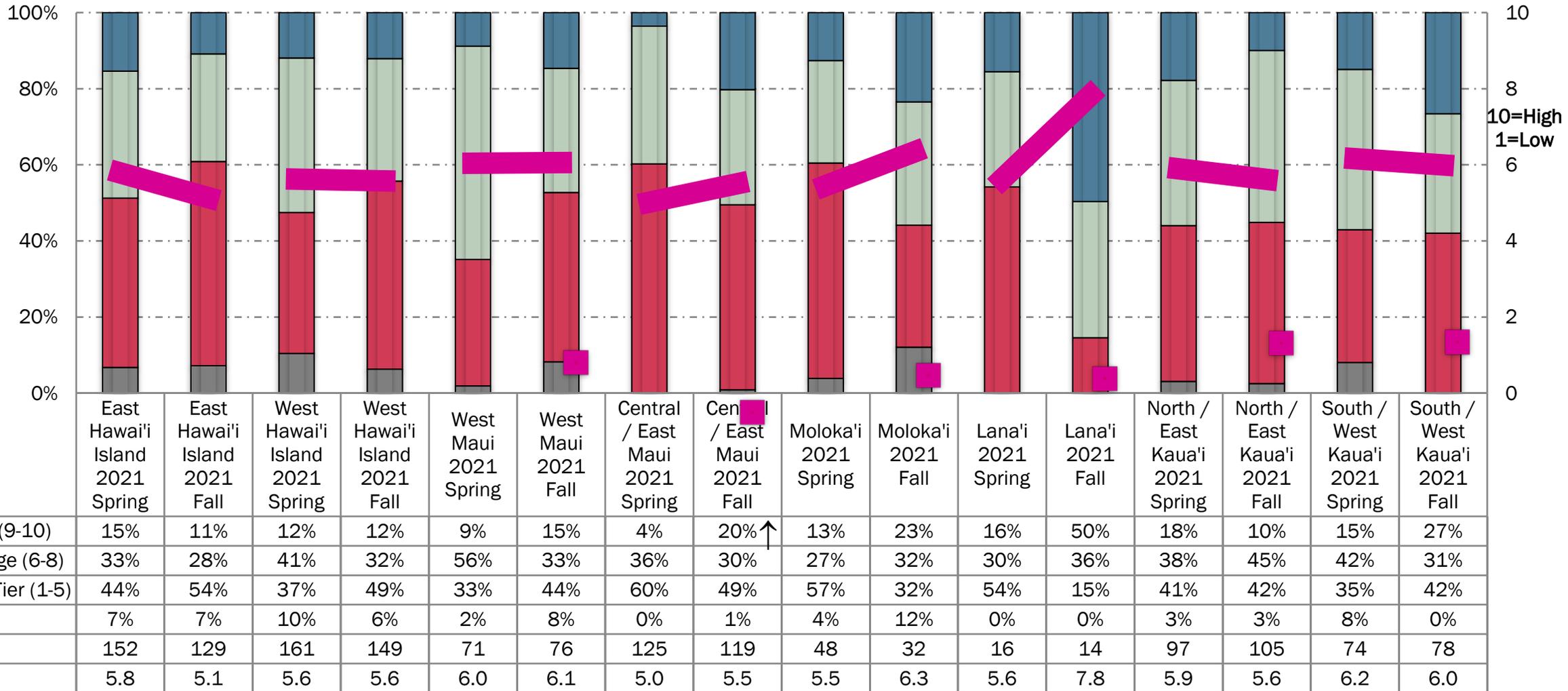
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” - *By Area (O‘ahu)*



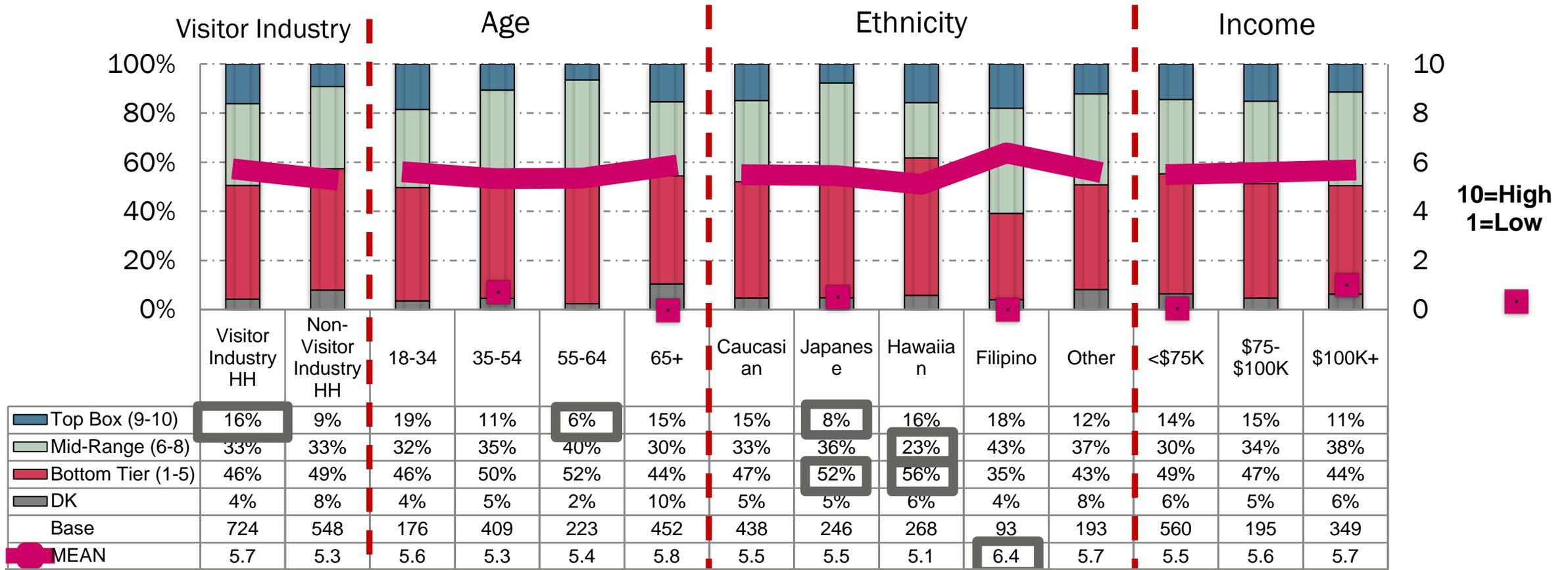
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“Promoting a vision for sustainable tourism that balances the state’s economic well-being and resident quality of life.” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



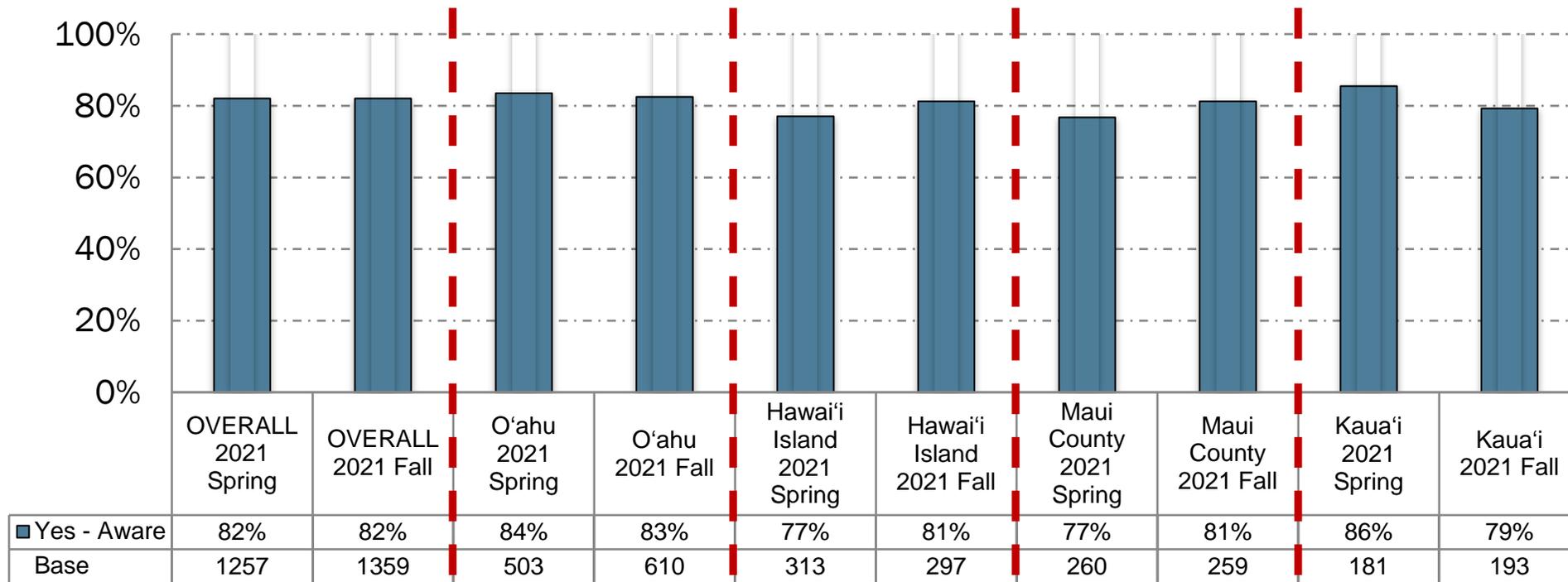
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“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” – *By Demographics*



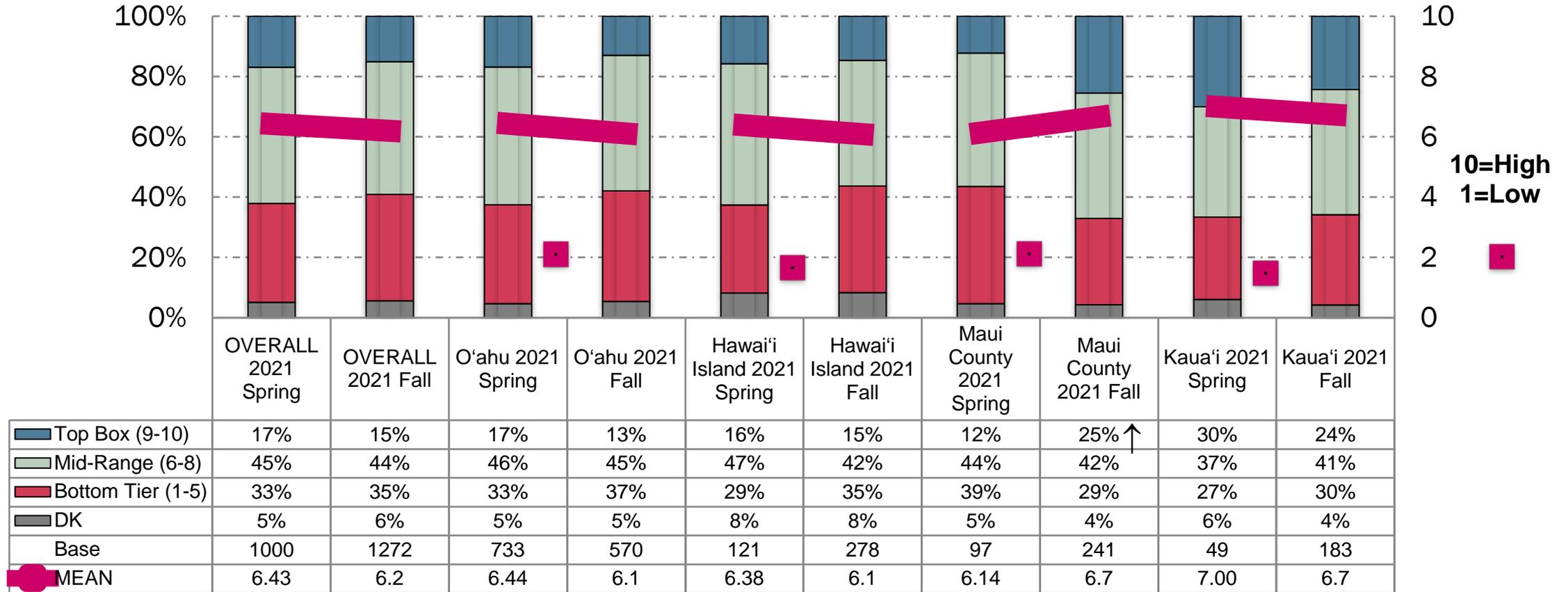
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HTA: Aware of Leading the visitor industry in Hawai'i - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

“Leading the visitor industry in Hawai’i “- *By Island*



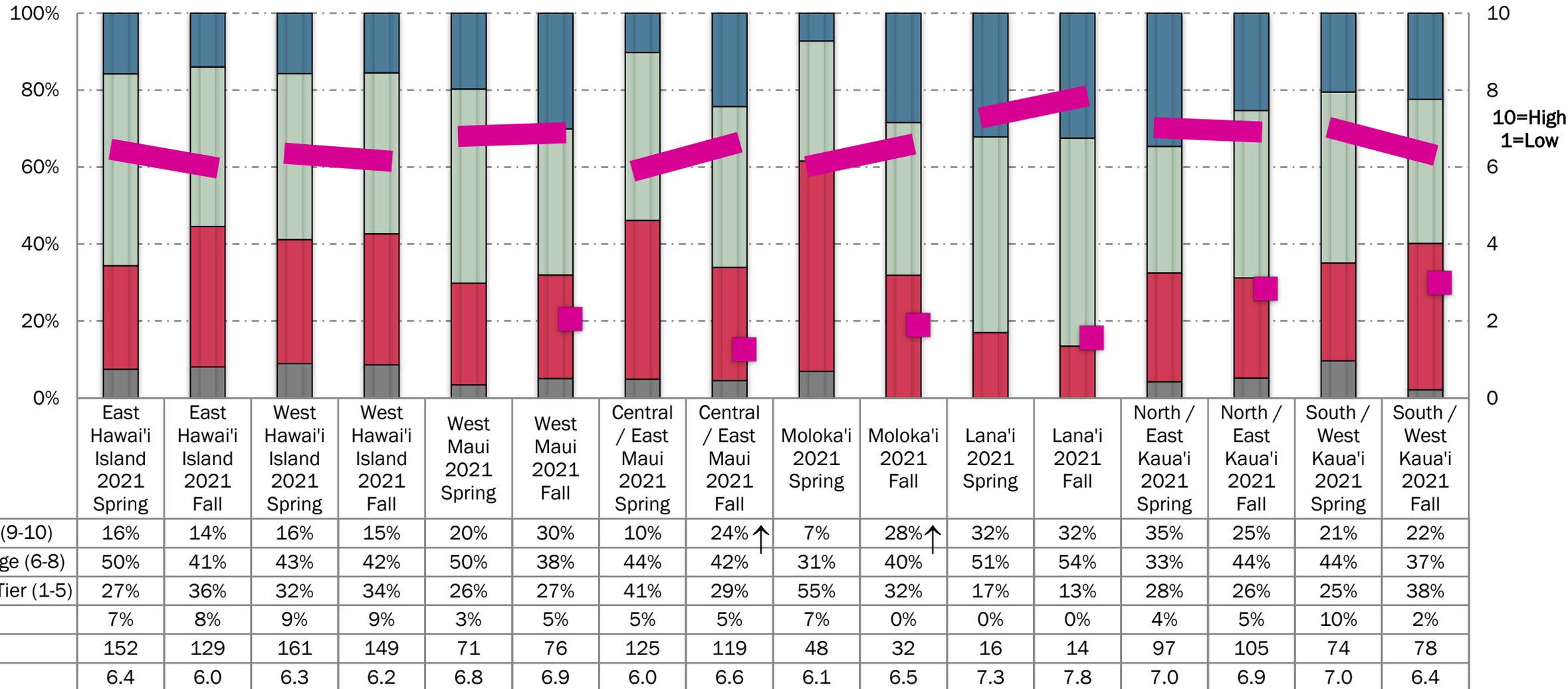
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“Leading the visitor industry in Hawai'i" - *By Area (O'ahu)*



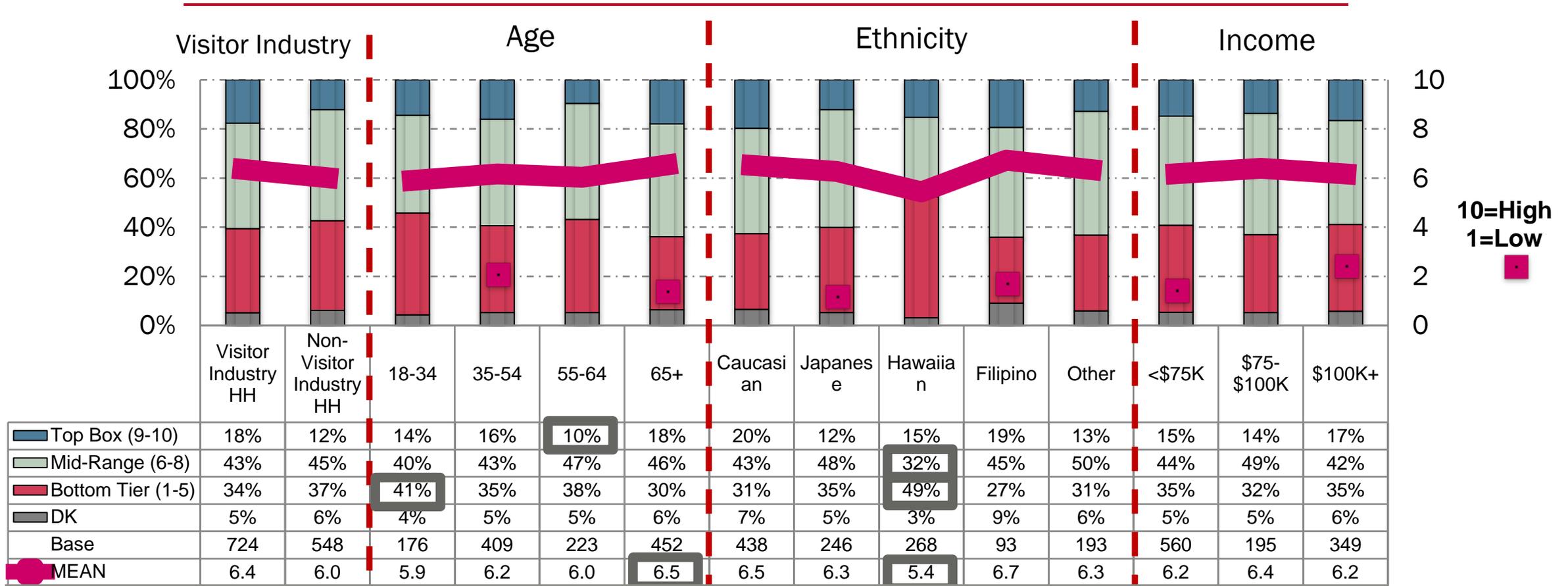
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“Leading the visitor industry in Hawai‘i” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



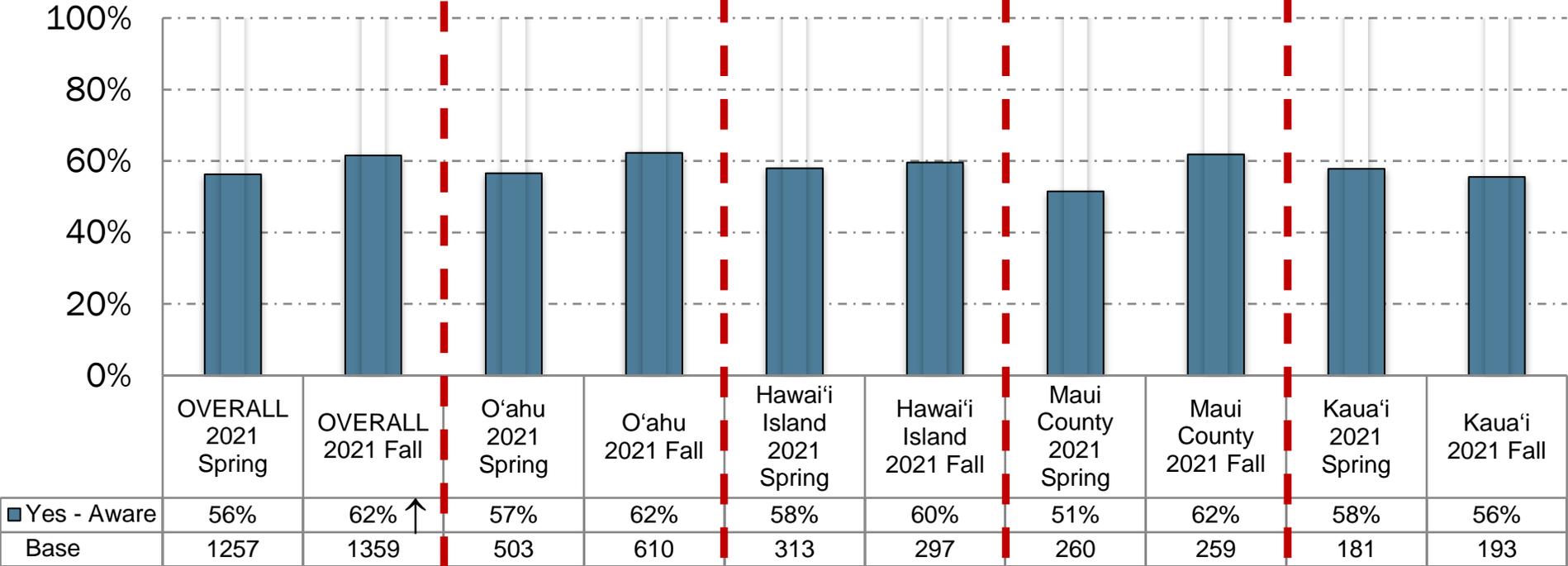
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“Leading the visitor industry in Hawai'i” – *By Demographics*



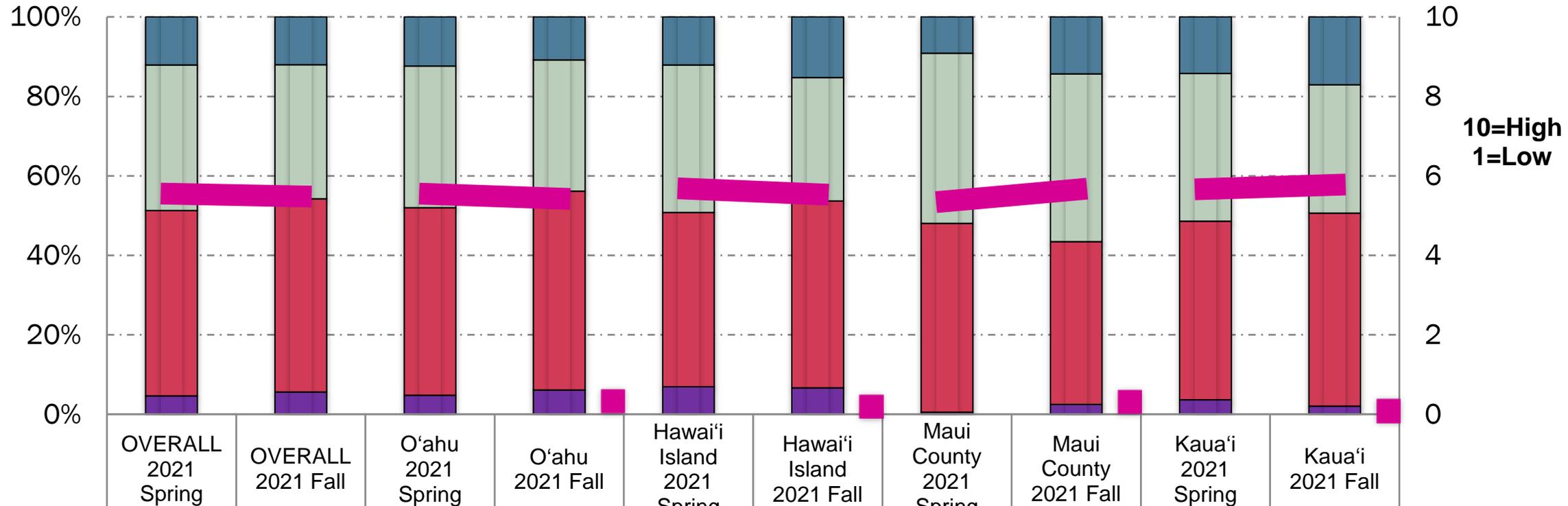
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HTA: Aware of Proactively educating the visitor industry, visitors and residents to mālama ma the islands and its traditions - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” – *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
■ Top Box (9-10)	12%	12%	12%	11%	12%	15%	9%	14%	14%	17%
■ Mid-Range (6-8)	37%	34%	36%	33%	37%	31%	43%	42%	37%	32%
■ Bottom Tier (1-5)	47%	49%	47%	50%	44%	47%	48%	41%	45%	49%
■ DK/Rf	5%	6%	5%	6%	7%	7%	1%	2%	4%	2%
Base	686	1272	496	570	91	278	65	241	33	183
■ MEAN	5.5	5.5	5.5	5.4	5.7	5.5	5.4	5.7	5.7	5.8

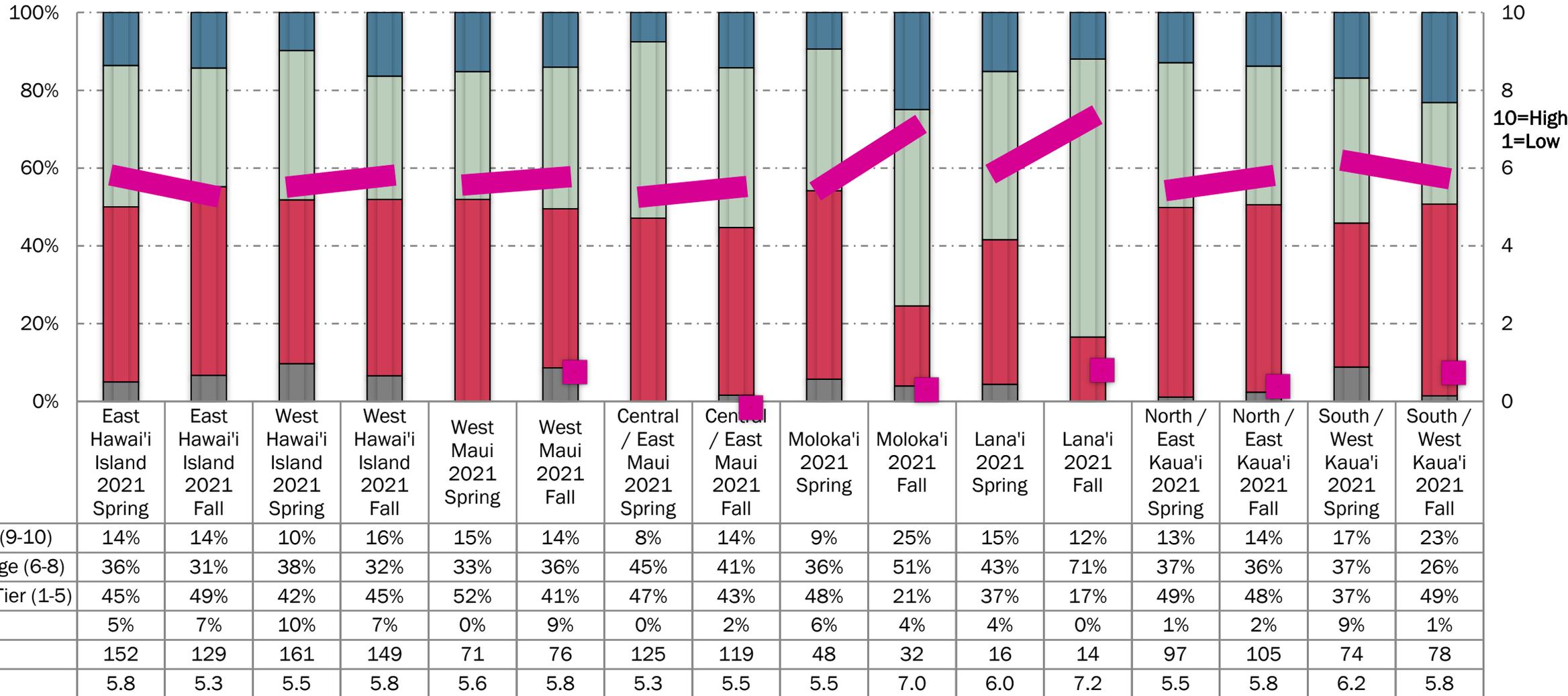
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” - *By Area (O‘ahu)*



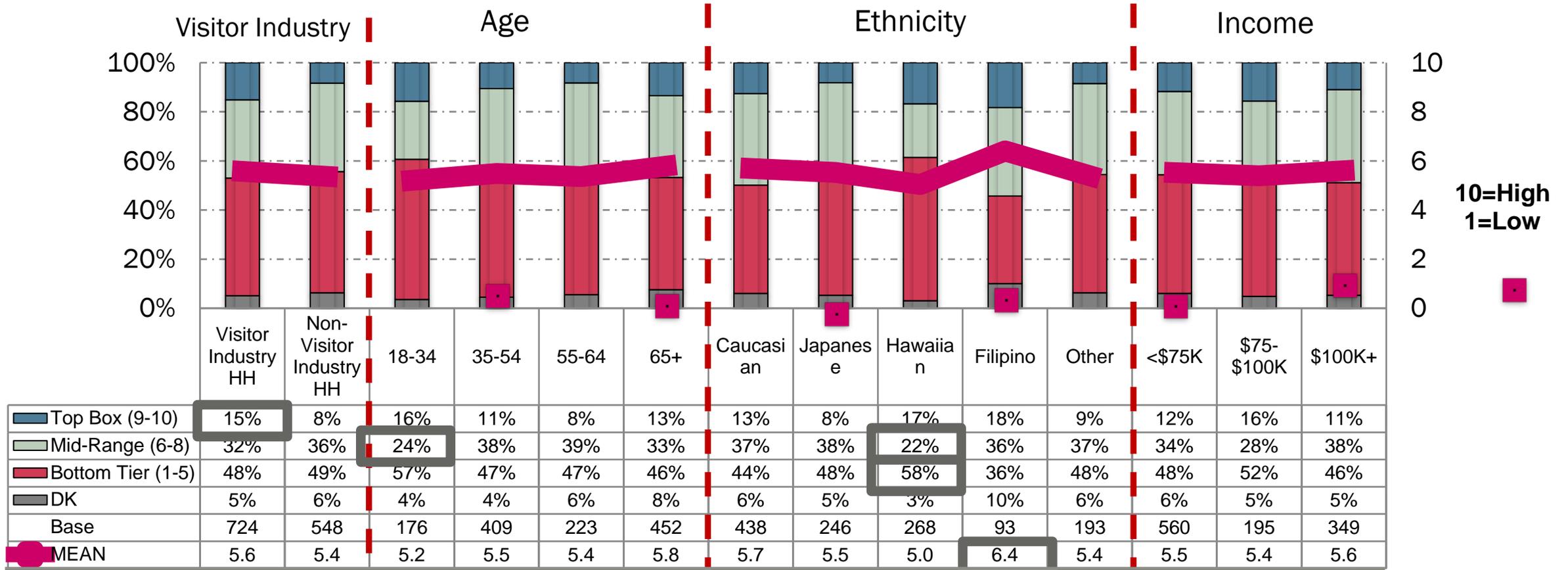
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



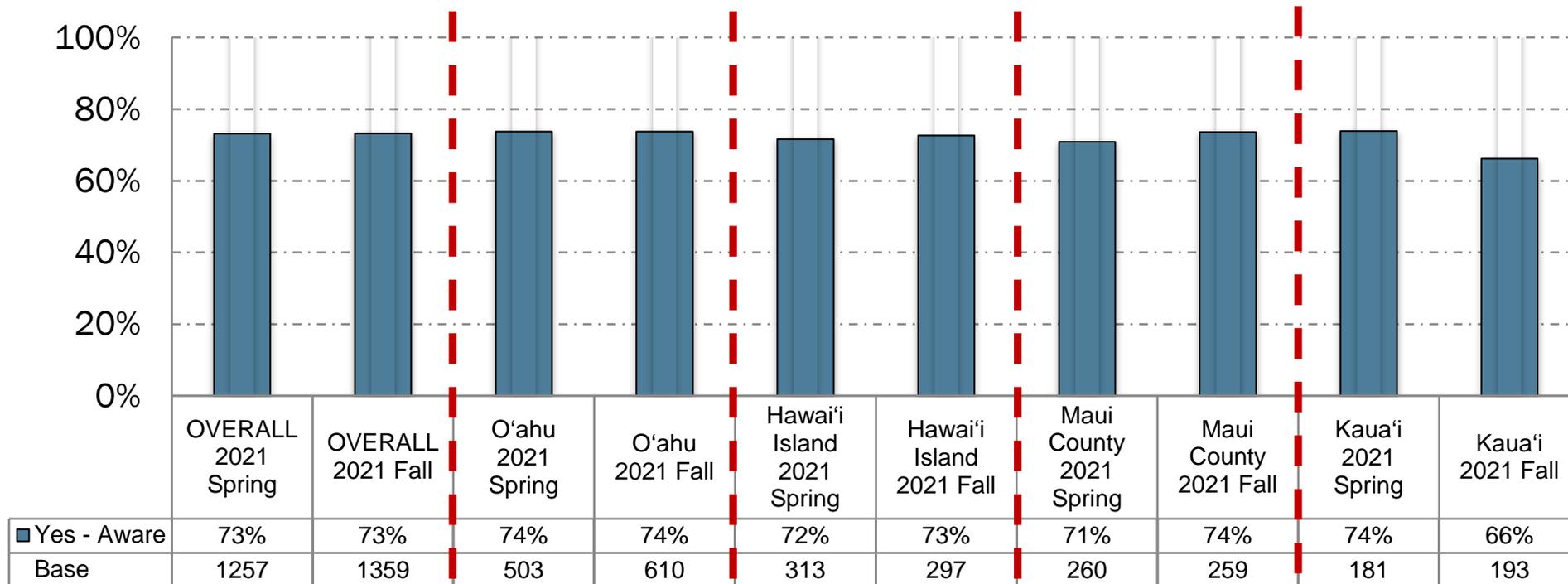
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” – *By Demographics*



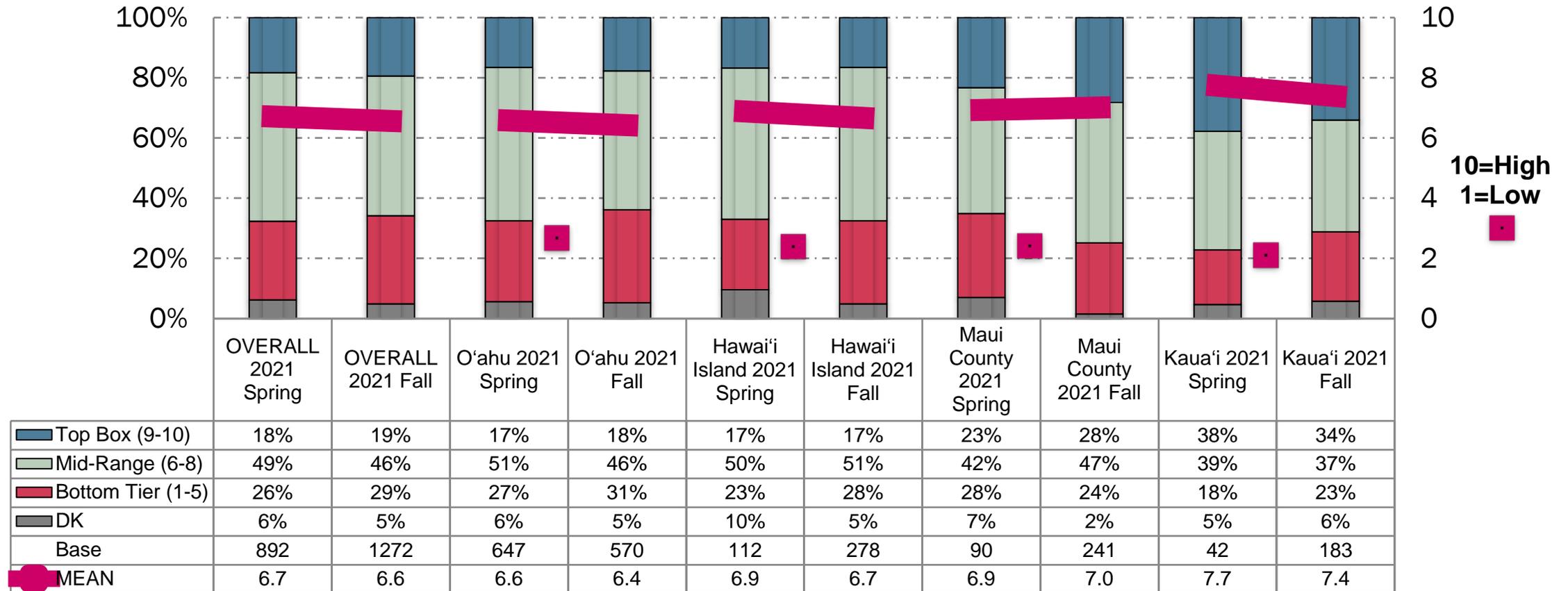
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HTA: Aware of Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

“Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination“- *By Island*



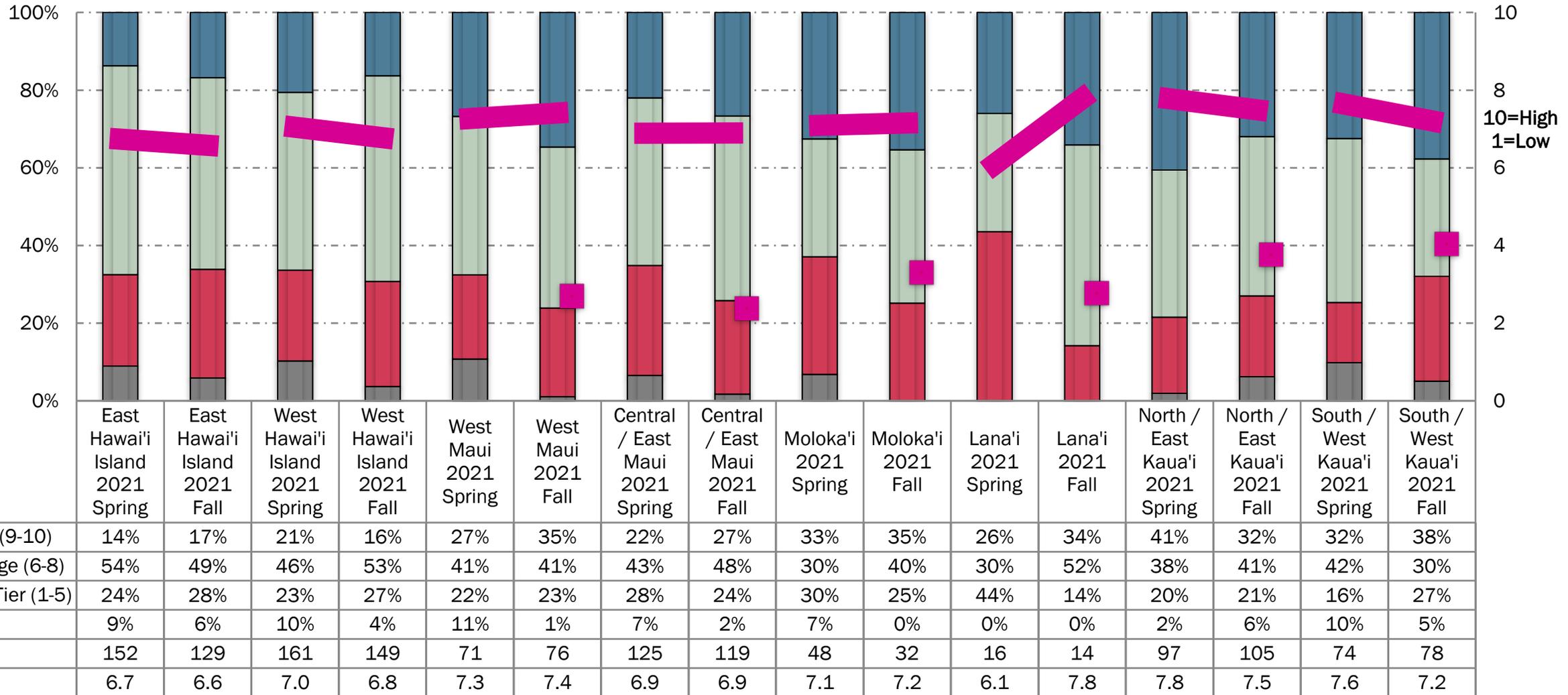
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“Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination” - *By Area (O'ahu)*



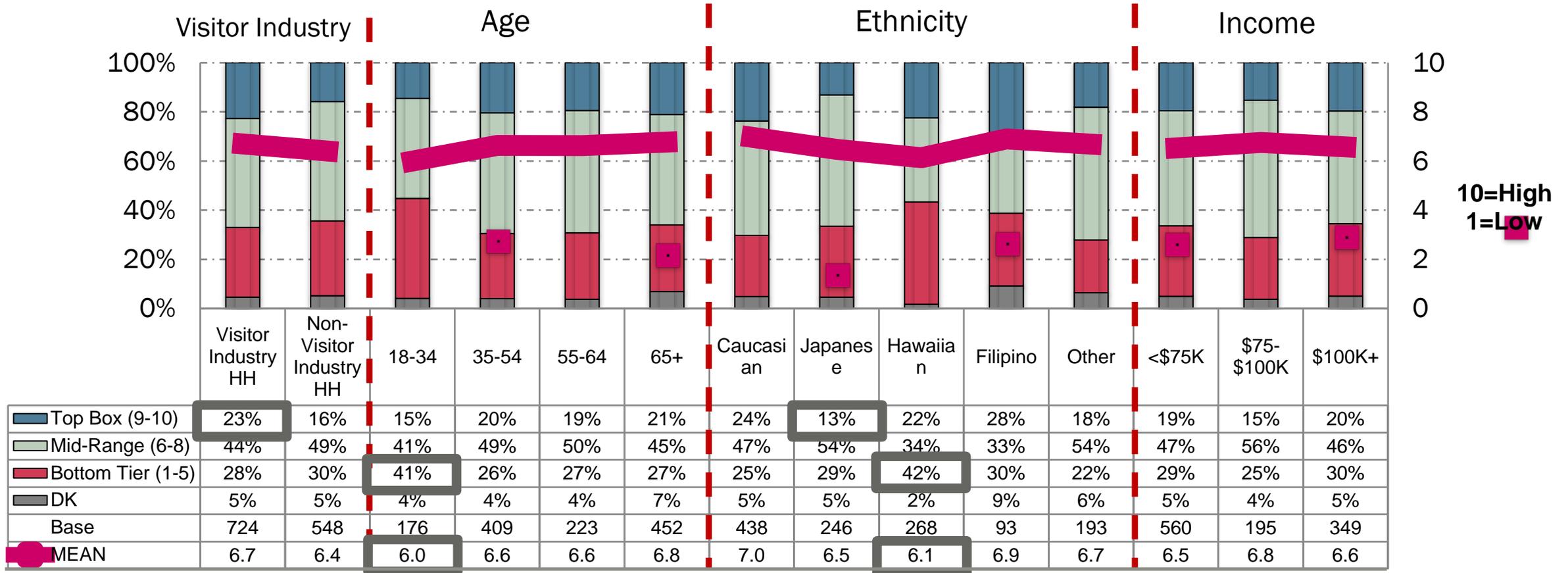
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“Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination” – *By Area (Hawai'i Island, Maui, & Kaua'i)*



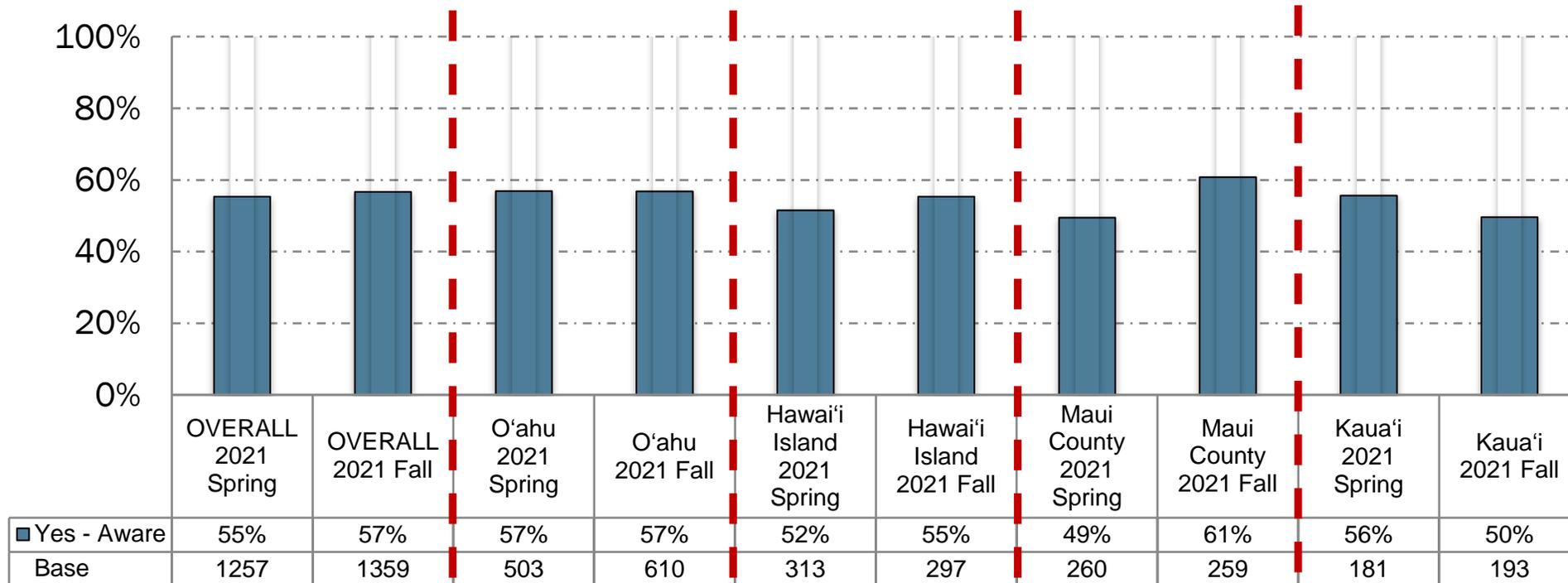
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“Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination” – *By Demographics*



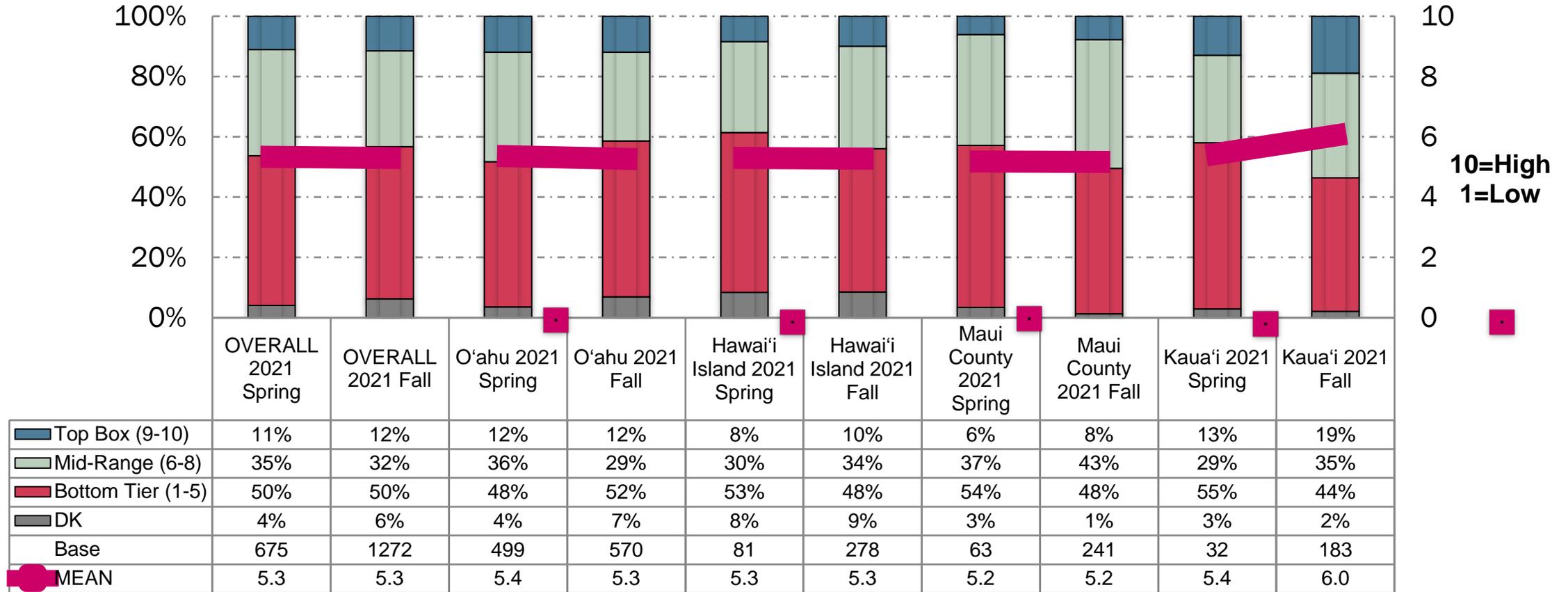
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HTA: Aware of Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns - *By Island*



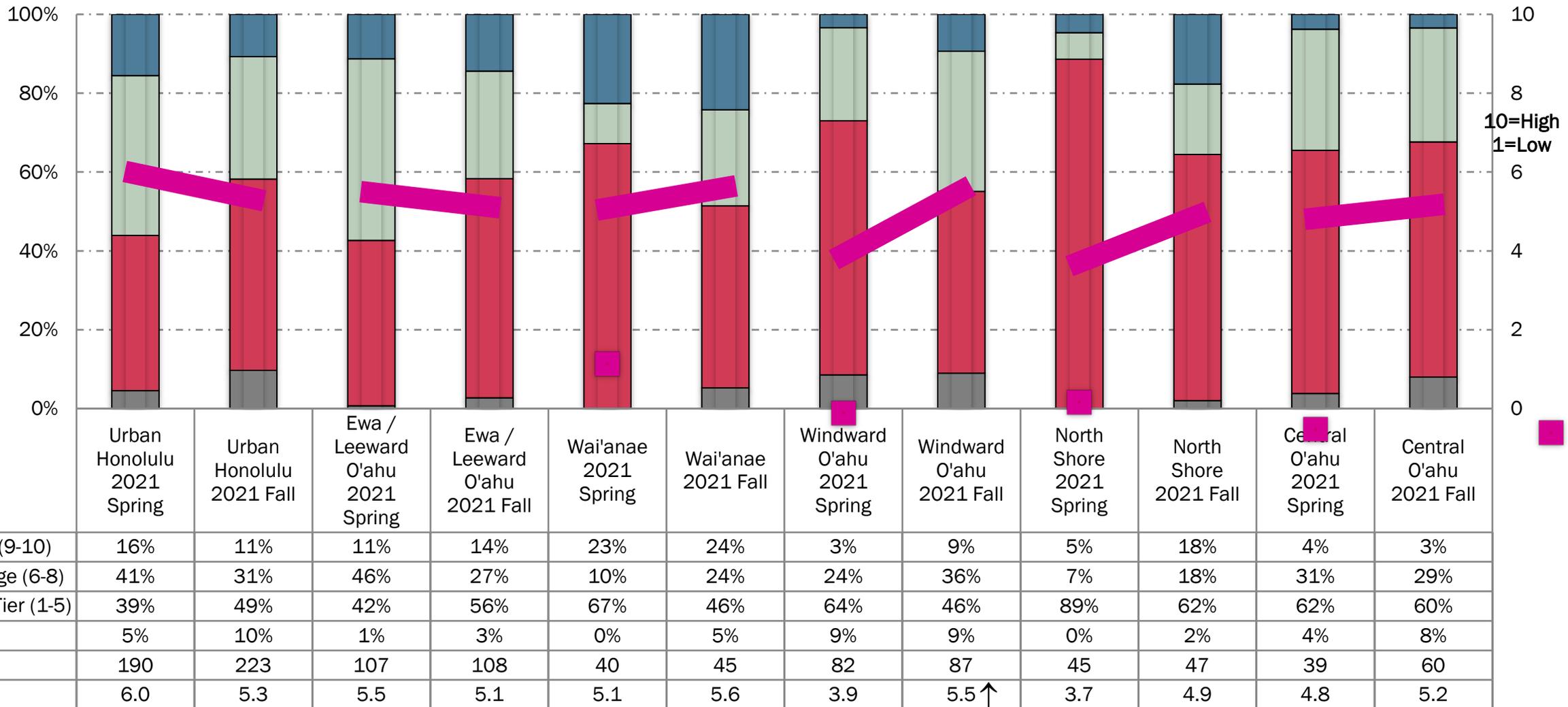
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“Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns“- *By Island*



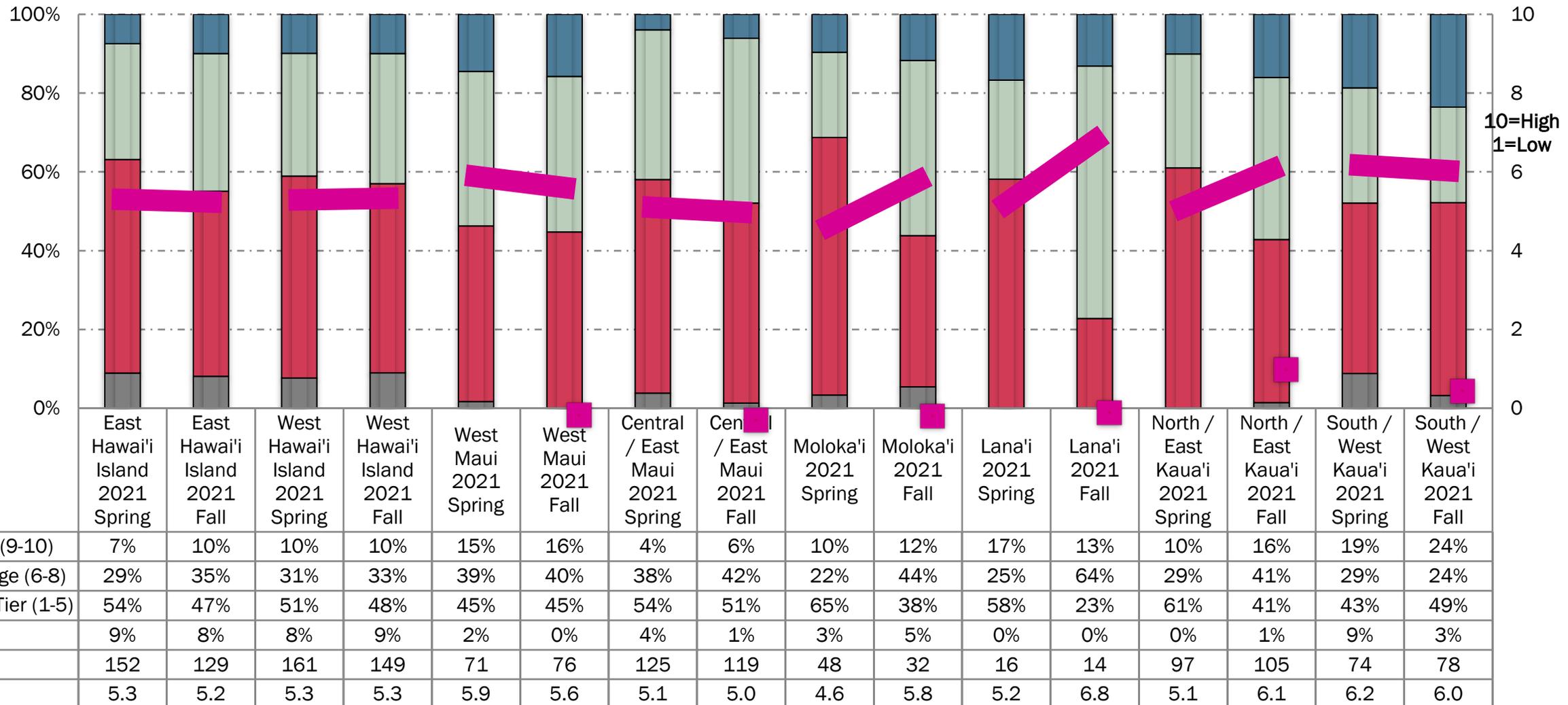
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“Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns” - *By Area (O'ahu)*



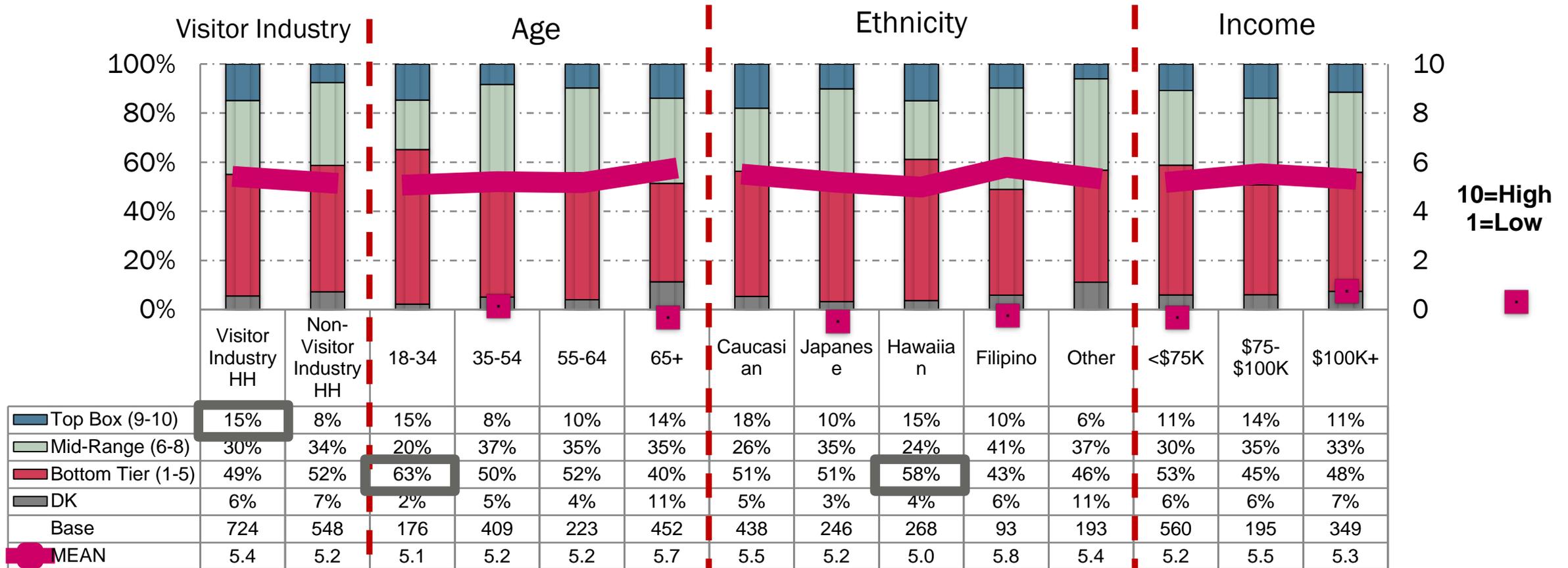
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“Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



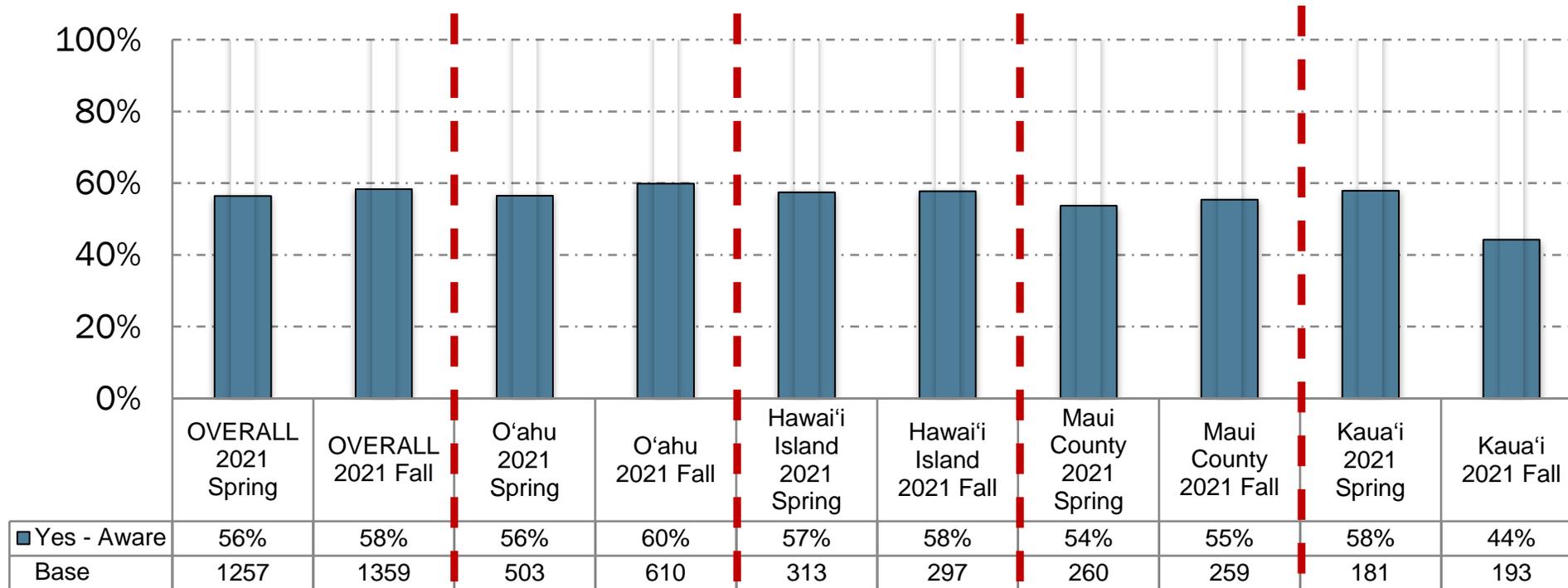
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“Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns” – *By Demographics*



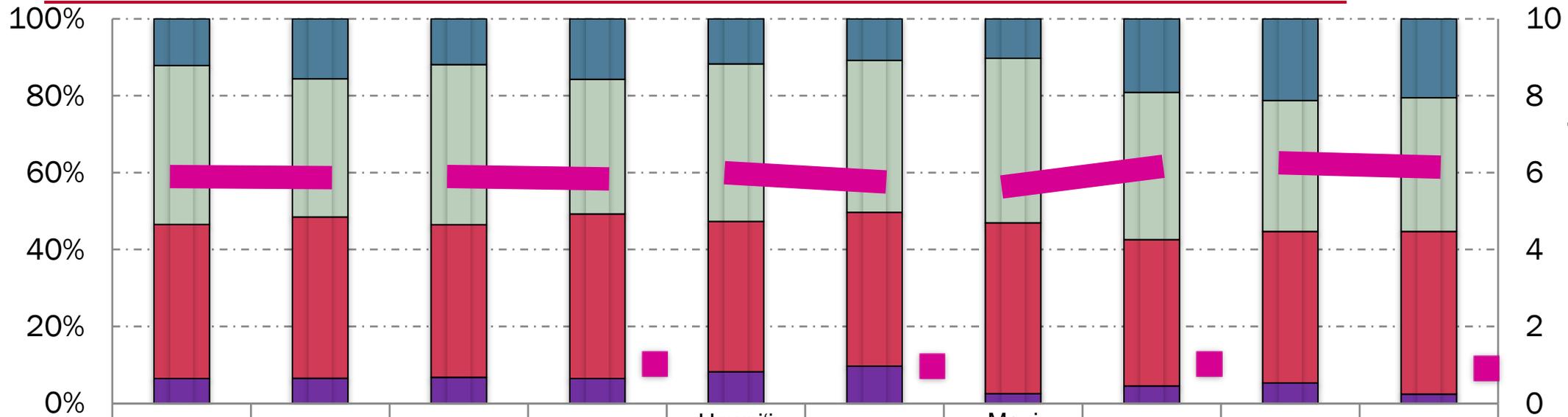
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HTA: Aware of Supporting and perpetuating Native Hawaiian culture, arts and places - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

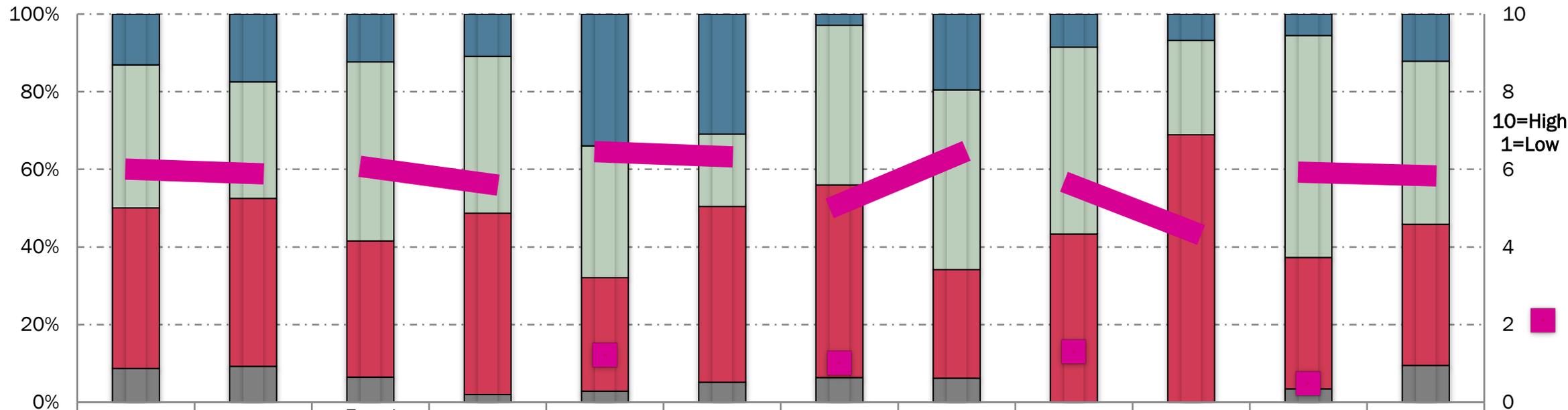
“Supporting and perpetuating Native Hawaiian culture, arts and places” – *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
■ Top Box (9-10)	12%	16%	12%	16%	12%	11%	10%	19%	21%	21%
■ Mid-Range (6-8)	41%	36%	42%	35%	41%	40%	43%	38%	34%	35%
■ Bottom Tier (1-5)	40%	42%	40%	43%	39%	40%	44%	38%	39%	42%
■ DK/Rf	6%	7%	7%	6%	8%	10%	2%	5%	5%	2%
Base	687	1272	495	570	90	278	68	241	33	183
■ MEAN	5.90	5.87	5.89	5.84	5.98	5.77	5.66	6.13	6.25	6.15

Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

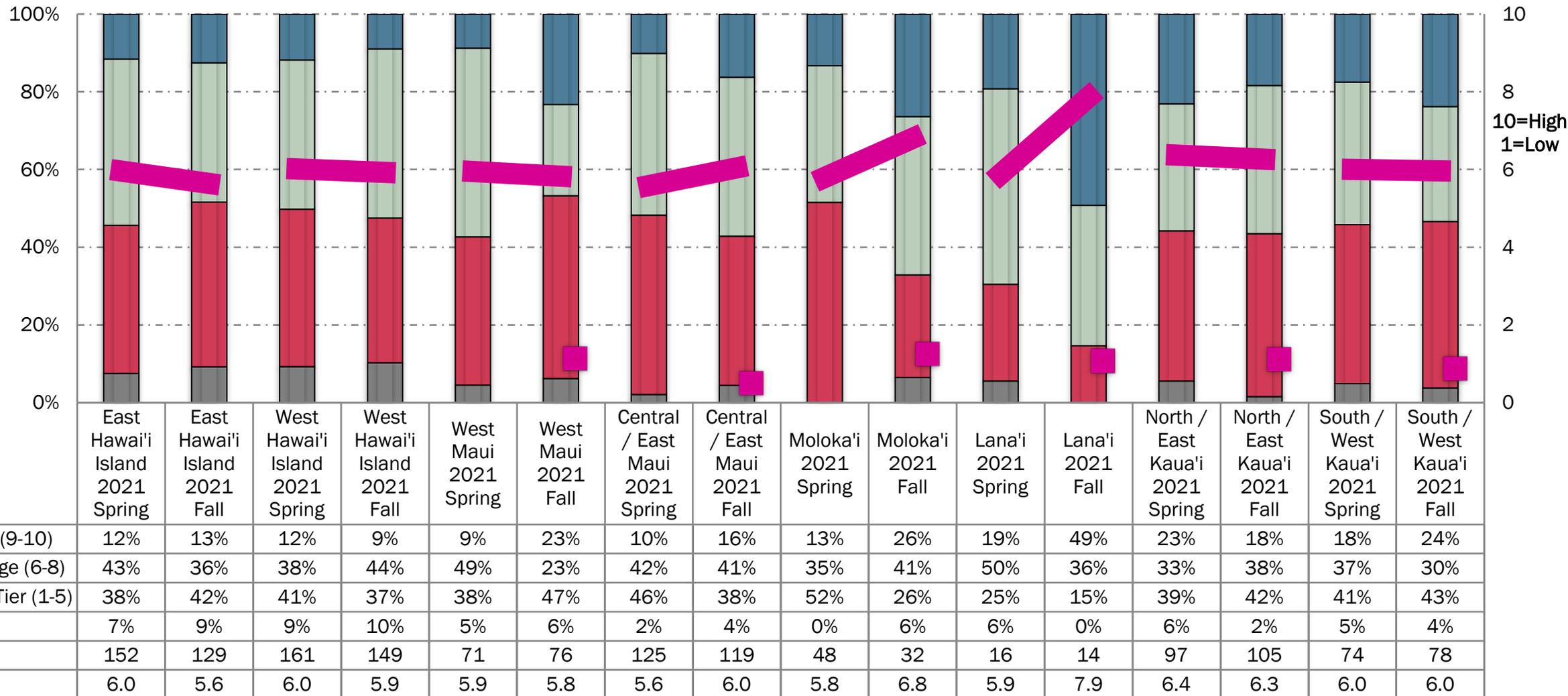
“Supporting and perpetuating Native Hawaiian culture, arts and places” - *By Area (O’ahu)*



	Urban Honolulu 2021 Spring	Urban Honolulu 2021 Fall	Ewa / Leeward O'ahu 2021 Spring	Ewa / Leeward O'ahu 2021 Fall	Wai'anae 2021 Spring	Wai'anae 2021 Fall	Windward O'ahu 2021 Spring	Windward O'ahu 2021 Fall	North Shore 2021 Spring	North Shore 2021 Fall	Central O'ahu 2021 Spring	Central O'ahu 2021 Fall
■ Top Box (9-10)	13%	17%	12%	11%	34%	31%	3%	20%↑	9%	7%	6%	12%
■ Mid-Range (6-8)	37%	30%	46%	40%	34%	19%	41%	46%	48%	24%	57%	42%
■ Bottom Tier (1-5)	41%	43%	35%	47%	29%	45%	50%	28%	43%	69%	34%	36%
■ DK/Rf	9%	9%	6%	2%	3%	5%	6%	6%	0%	0%	3%	9%
Base	190	223	107	108	40	45	82	87	45	47	39	60
MEAN	6.0	5.9	6.0	5.6	6.4	6.3	5.1	6.4↑	5.6	4.4	5.9	5.8

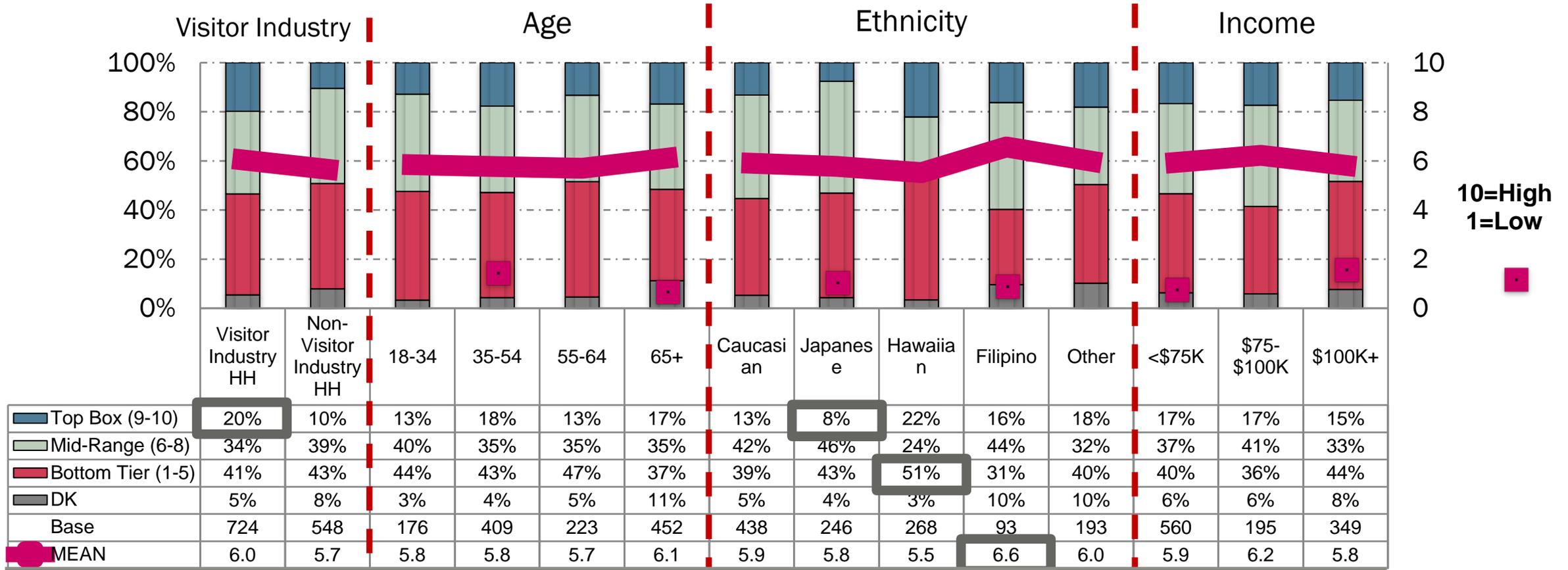
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Supporting and perpetuating Native Hawaiian culture, arts and places” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



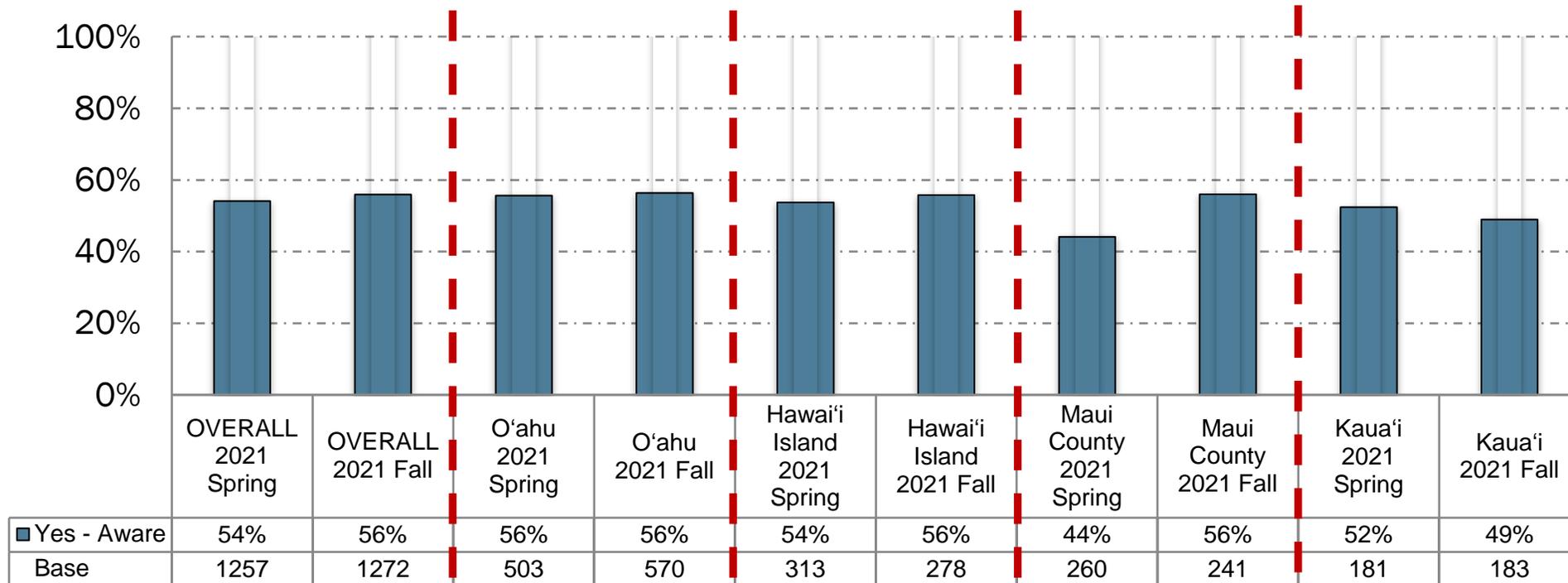
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Supporting and perpetuating Native Hawaiian culture, arts and places” – *By Demographics*



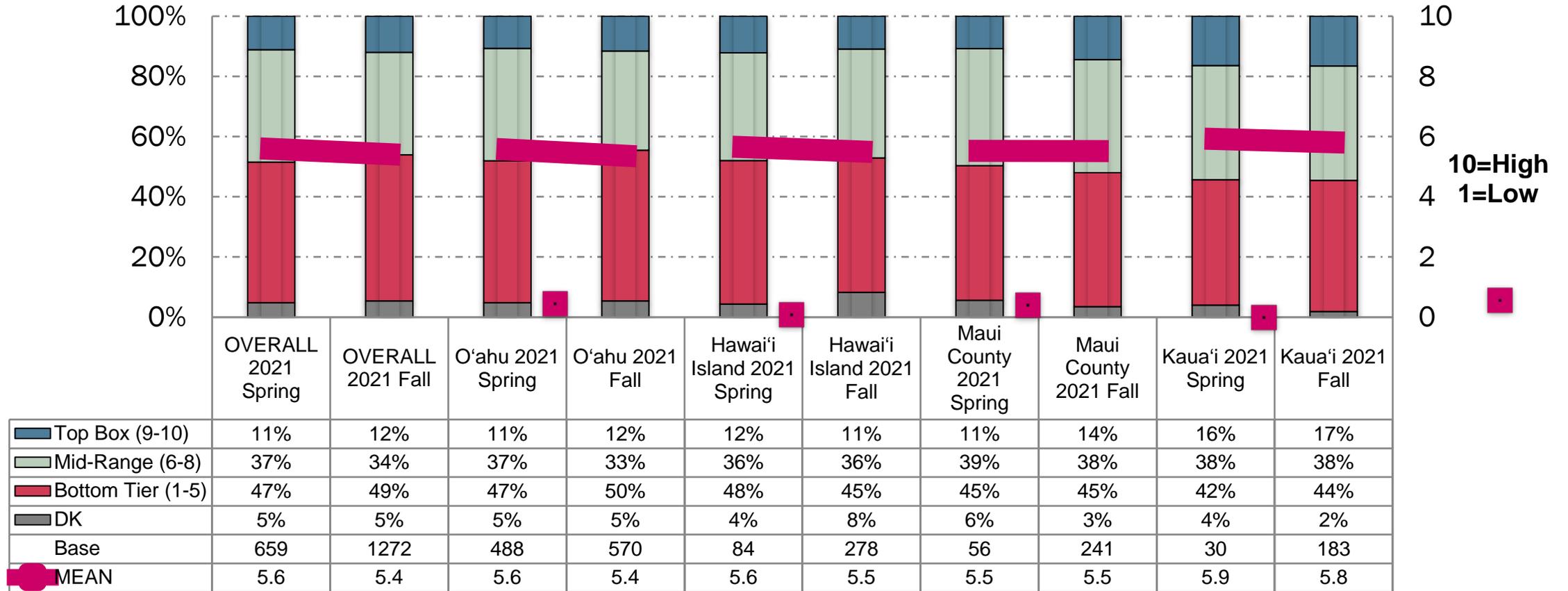
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

HTA: Aware of Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources - *By Island*



Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

“Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources“- *By Island*



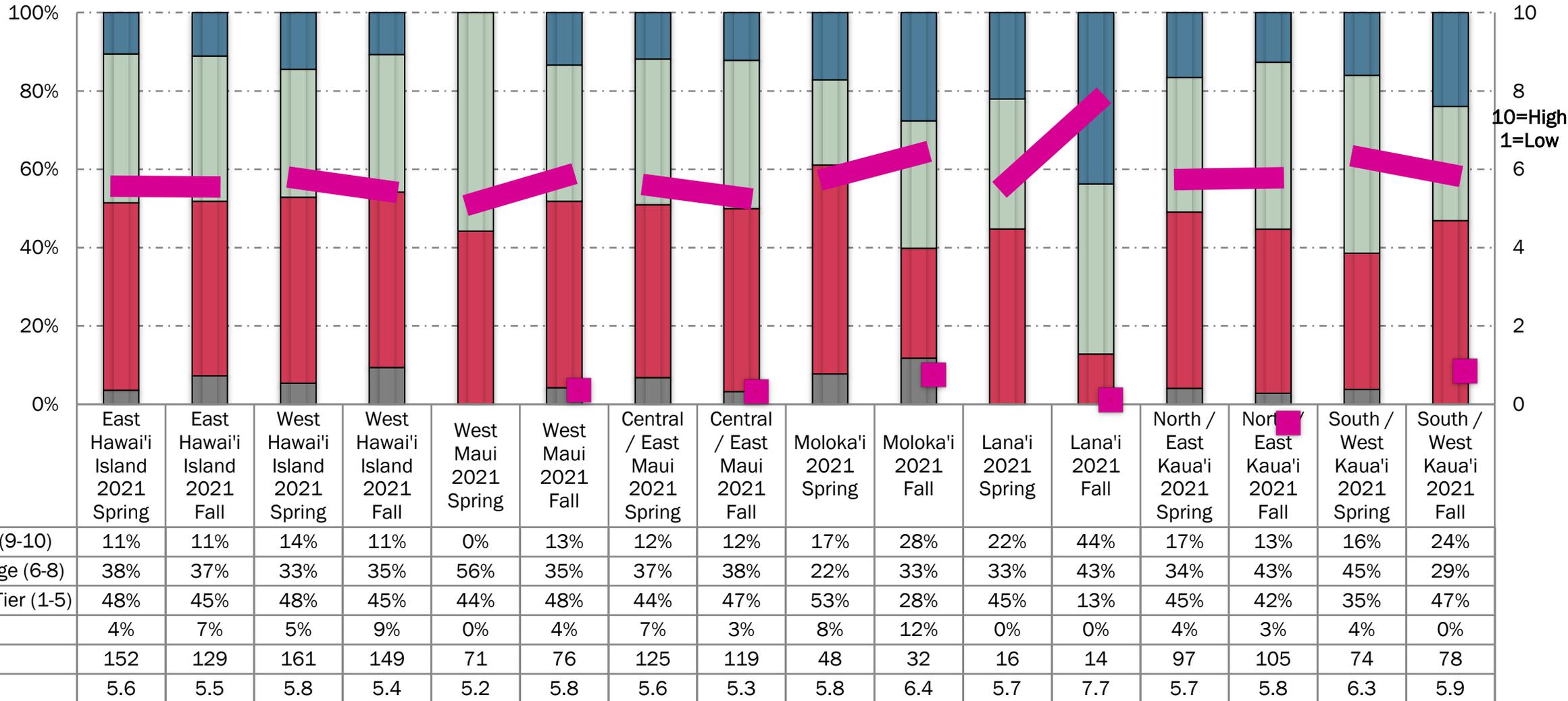
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources” - *By Area (O'ahu)*



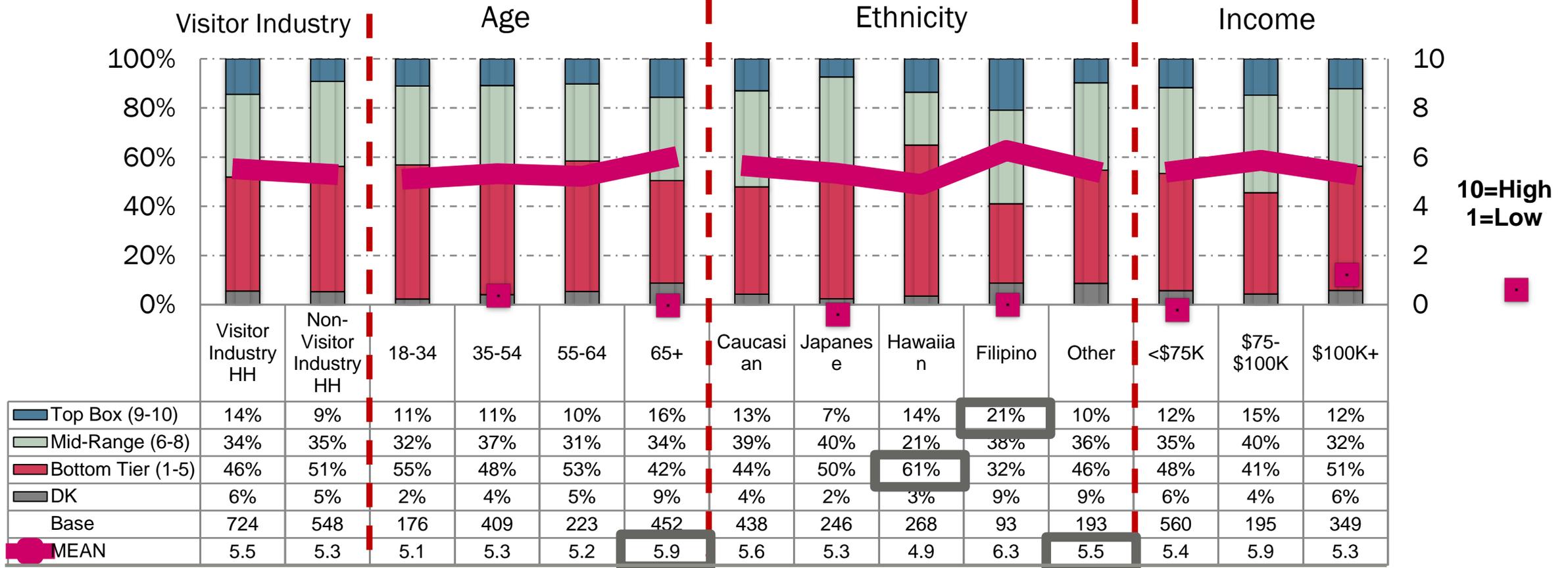
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...

“Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources” – *By Demographics*

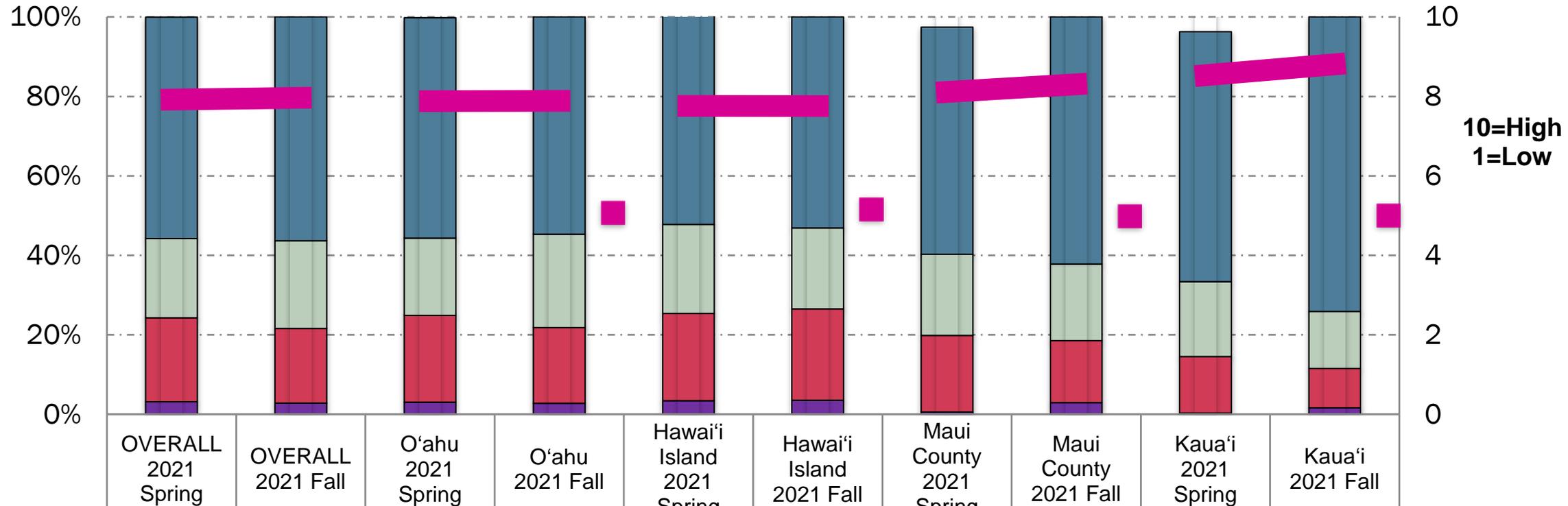


Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...



Managed Tourism Strategies (Spring and Fall 2021)

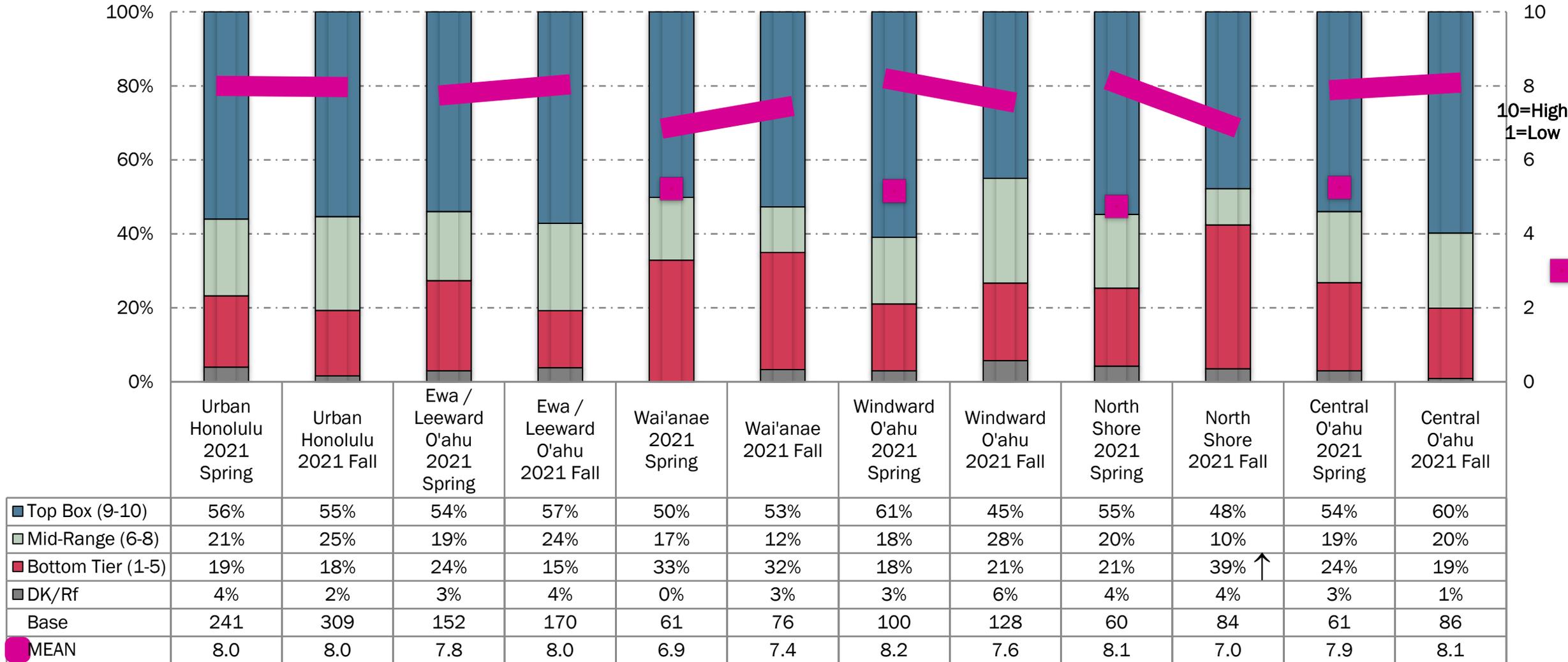
“Eliminate illegal vacation rentals on my island” – *By Island*



	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
■ Top Box (9-10)	56%	56%	55%	55%	53%	53%	57%	62%	63%	74% ↑
■ Mid-Range (6-8)	20%	22%	19%	23%	22%	20%	20%	19%	19%	14%
■ Bottom Tier (1-5)	21%	19%	22%	19%	22%	23%	19%	16%	14%	10%
■ DK/Rf	3%	3%	3%	3%	3%	4%	1%	3%	0%	2%
Base	1779	2007	675	853	451	458	376	419	277	277
■ MEAN	7.92	7.96	7.88	7.89	7.76	7.76	8.11	8.31	8.53	8.81

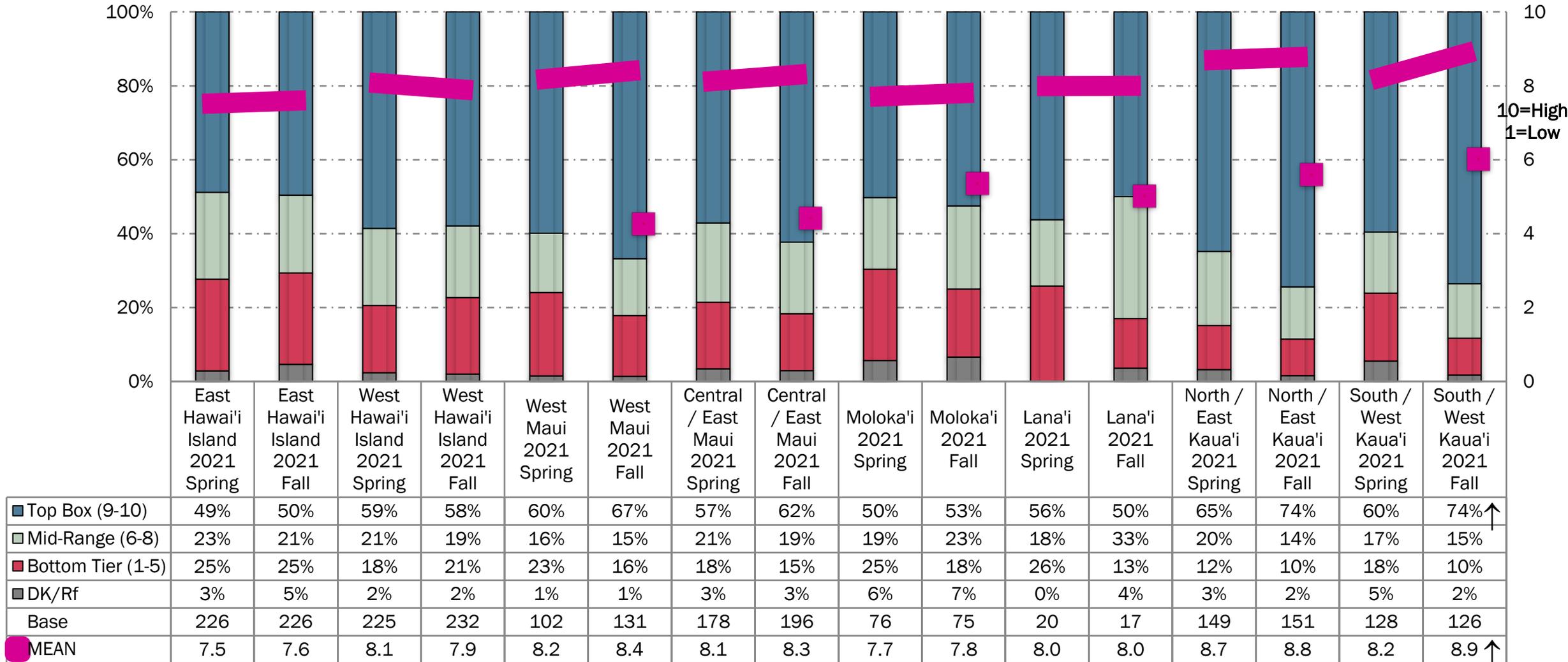
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



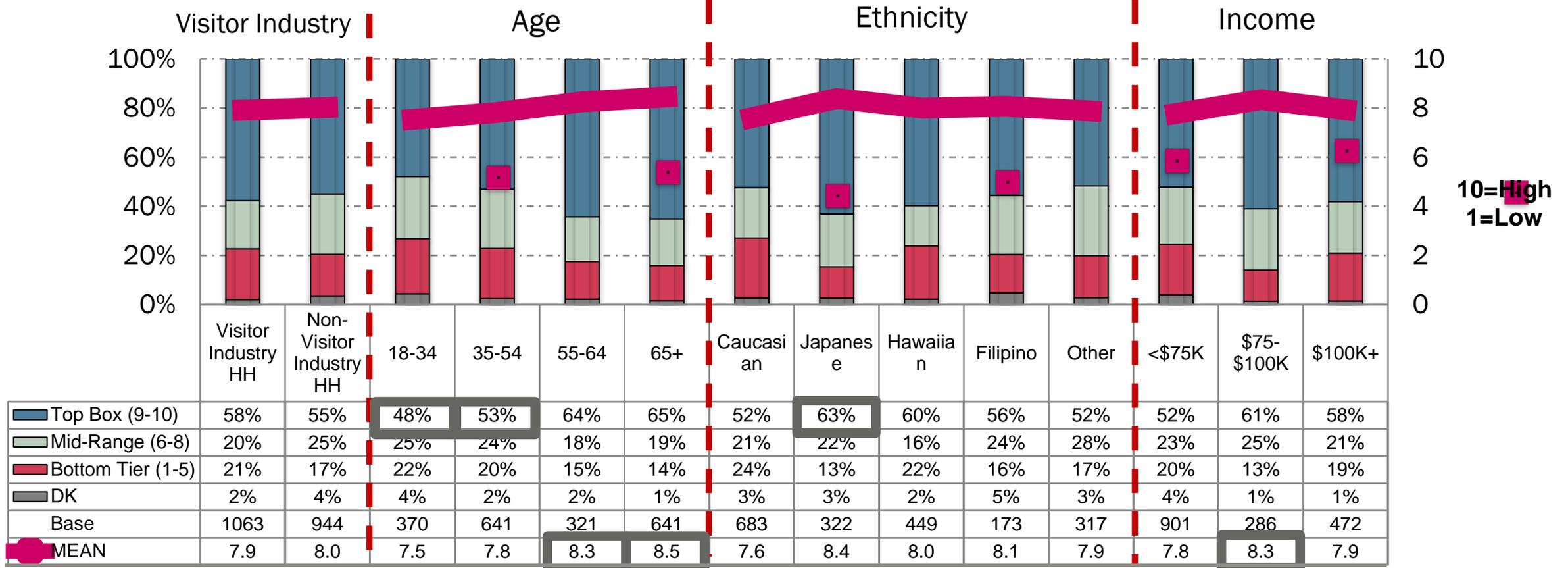
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Eliminate illegal vacation rentals on my island” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



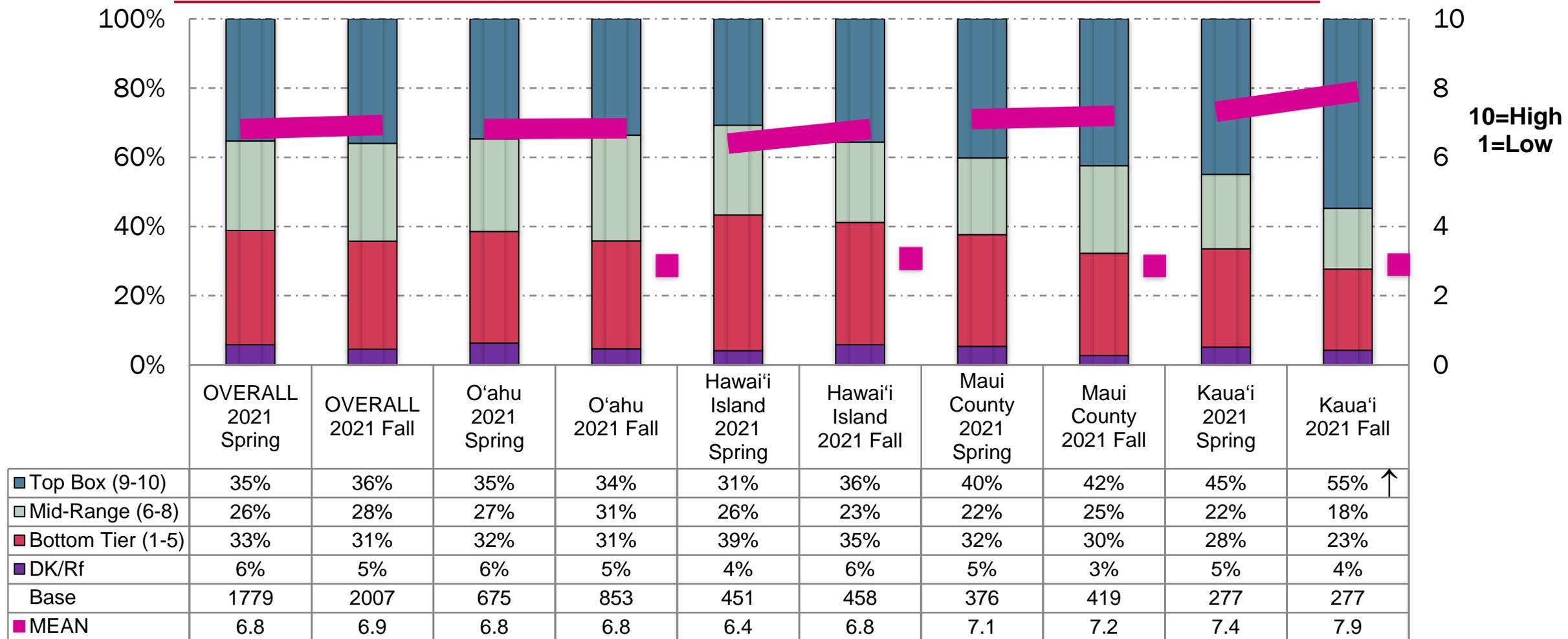
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



Q7. Legally, the state of Hawaii 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 Island*



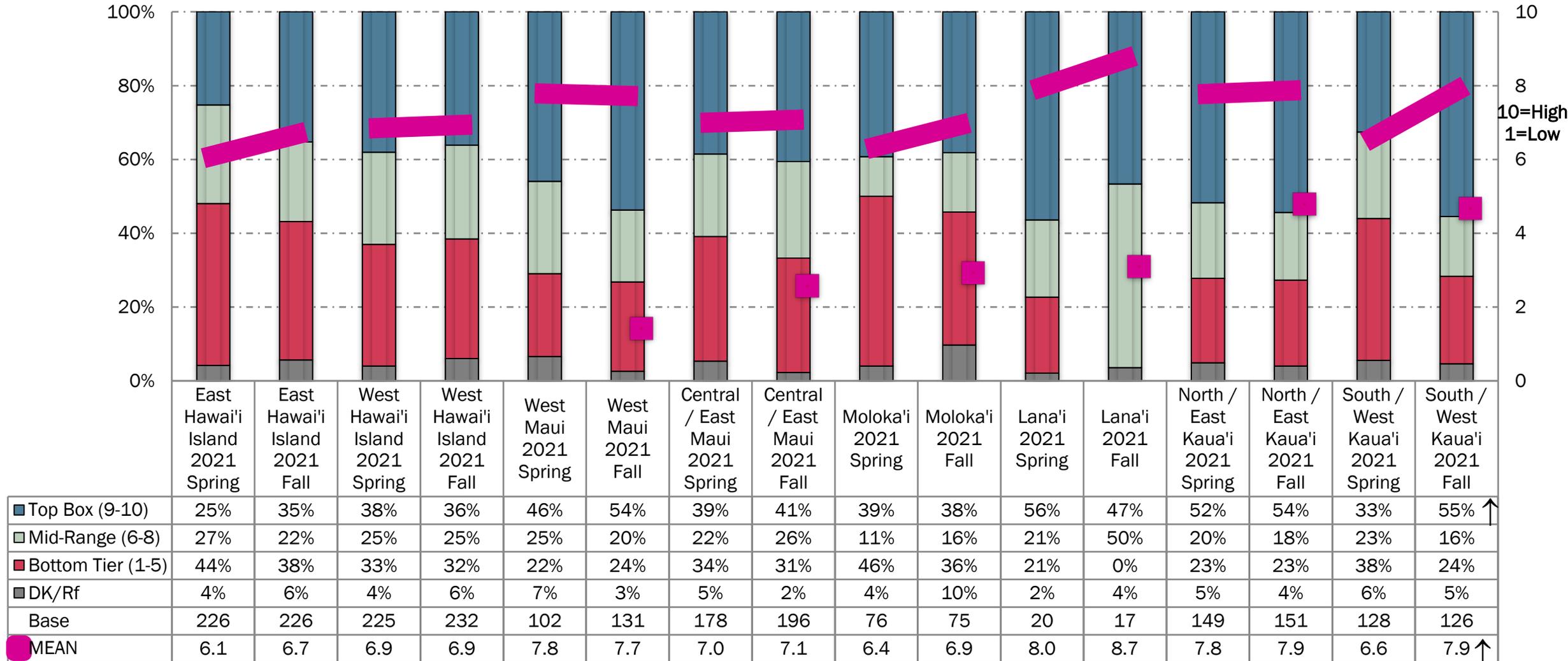
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



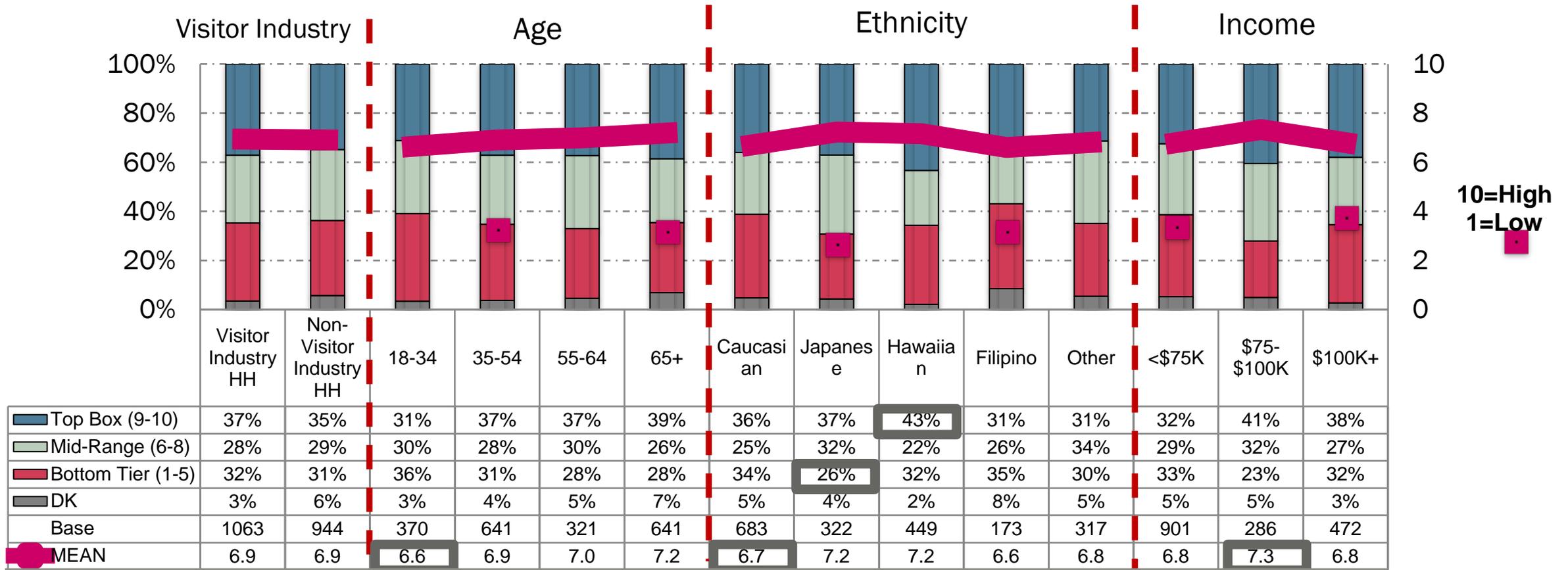
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



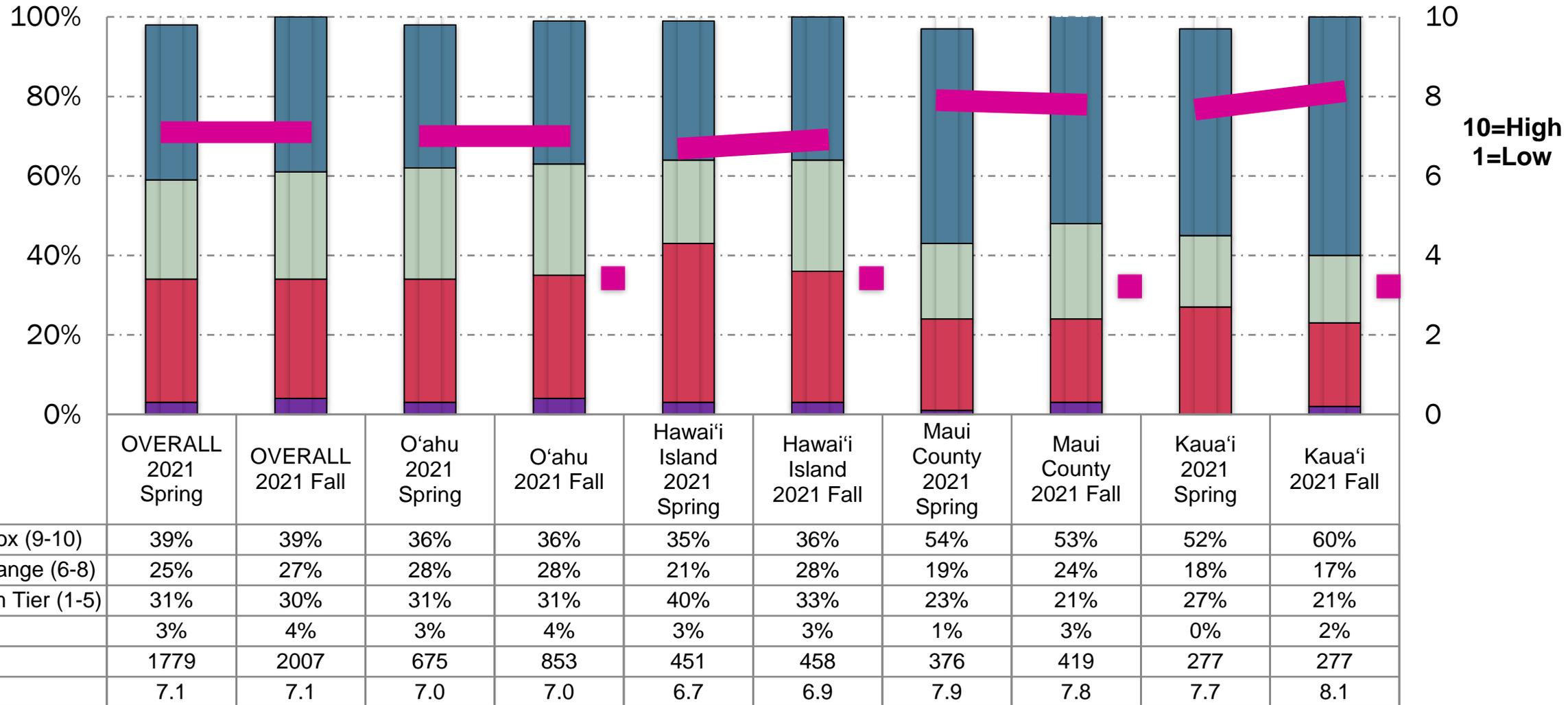
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



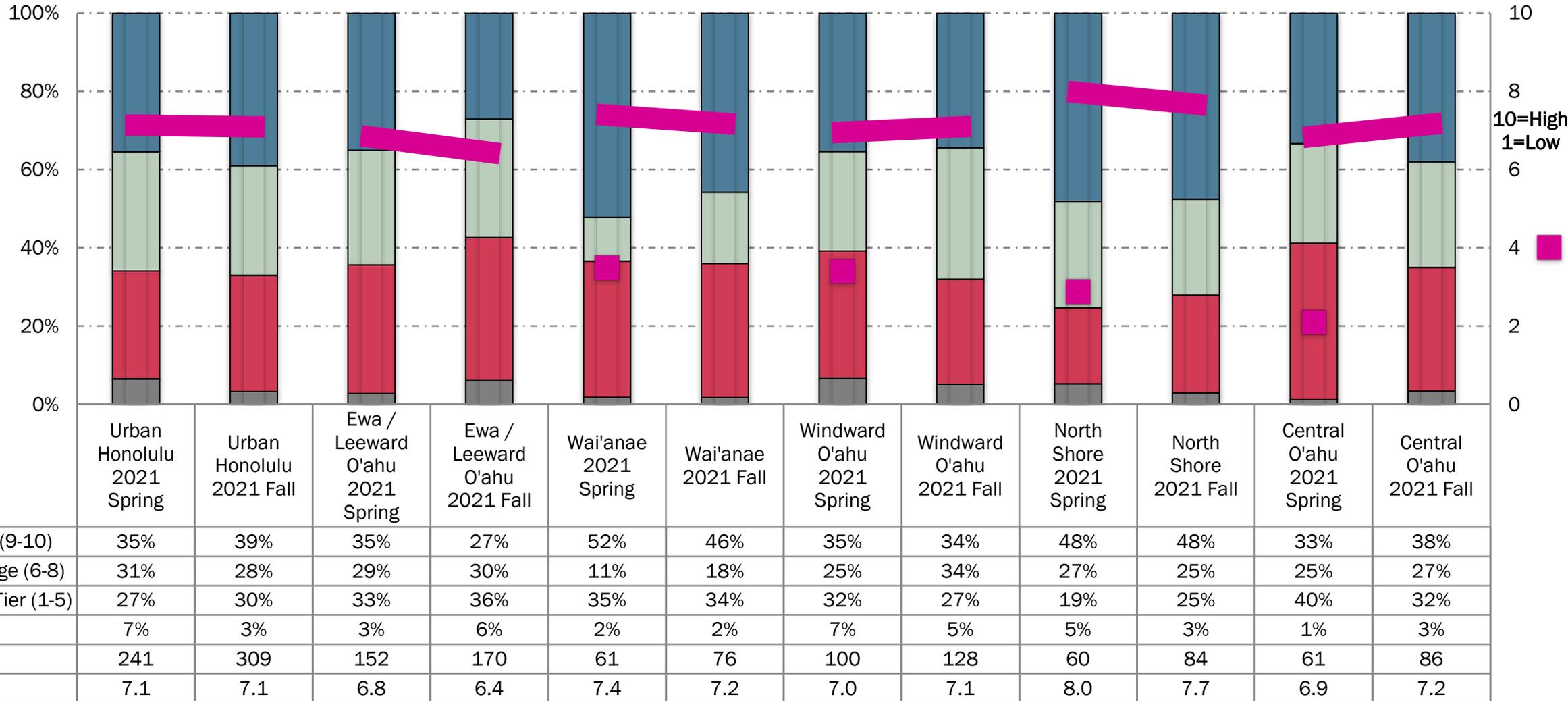
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



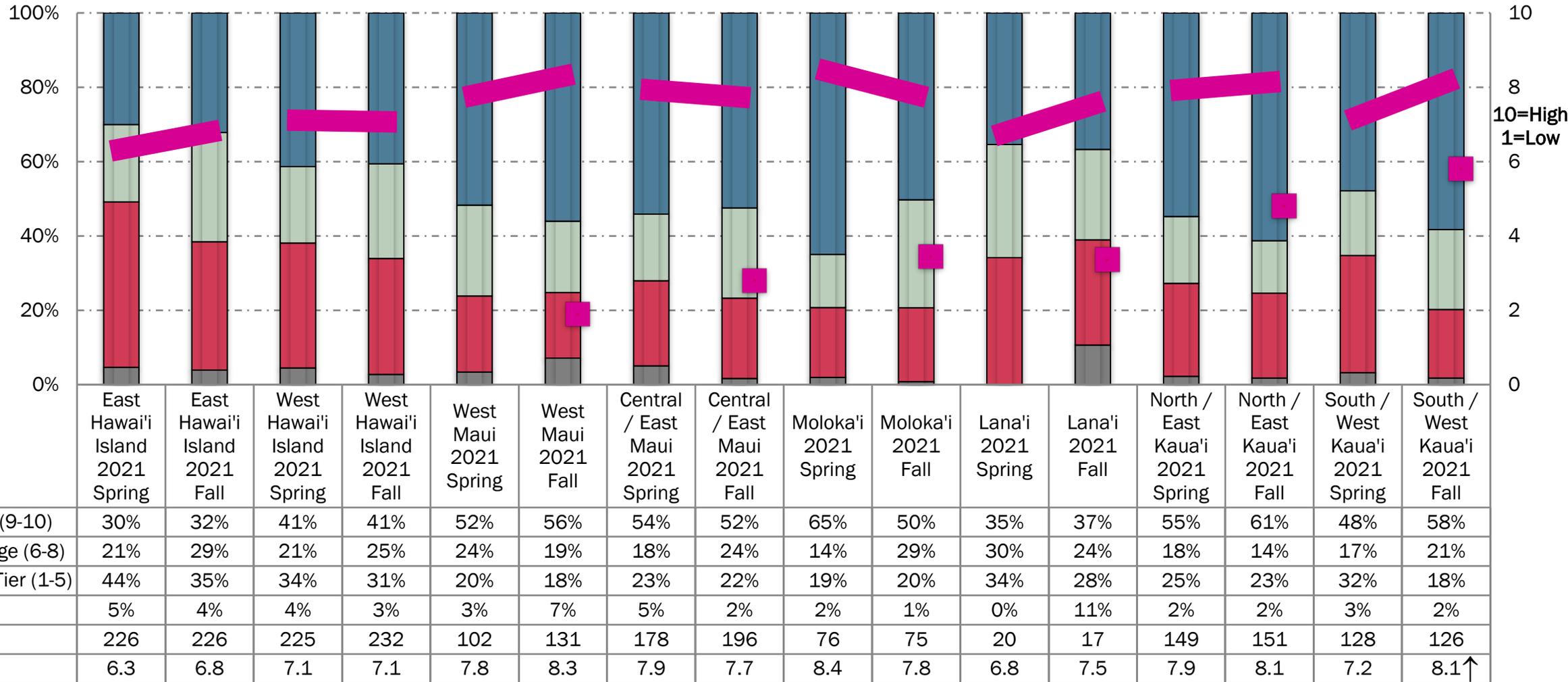
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



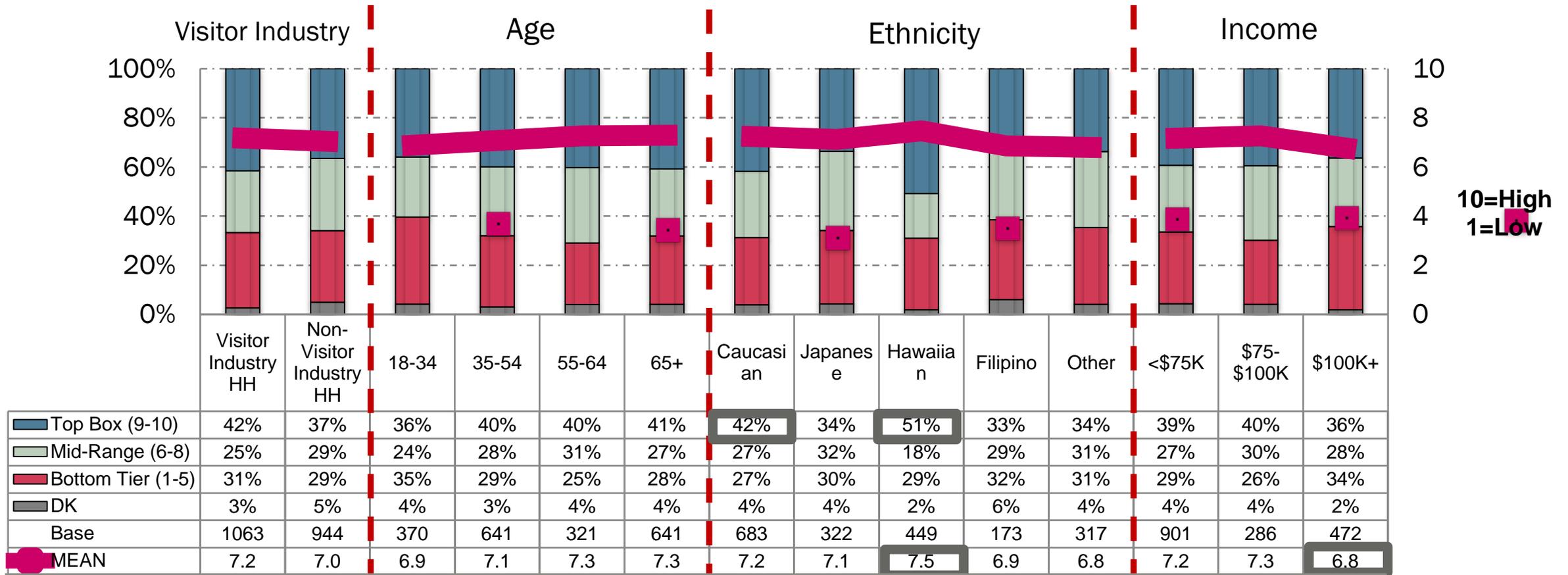
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



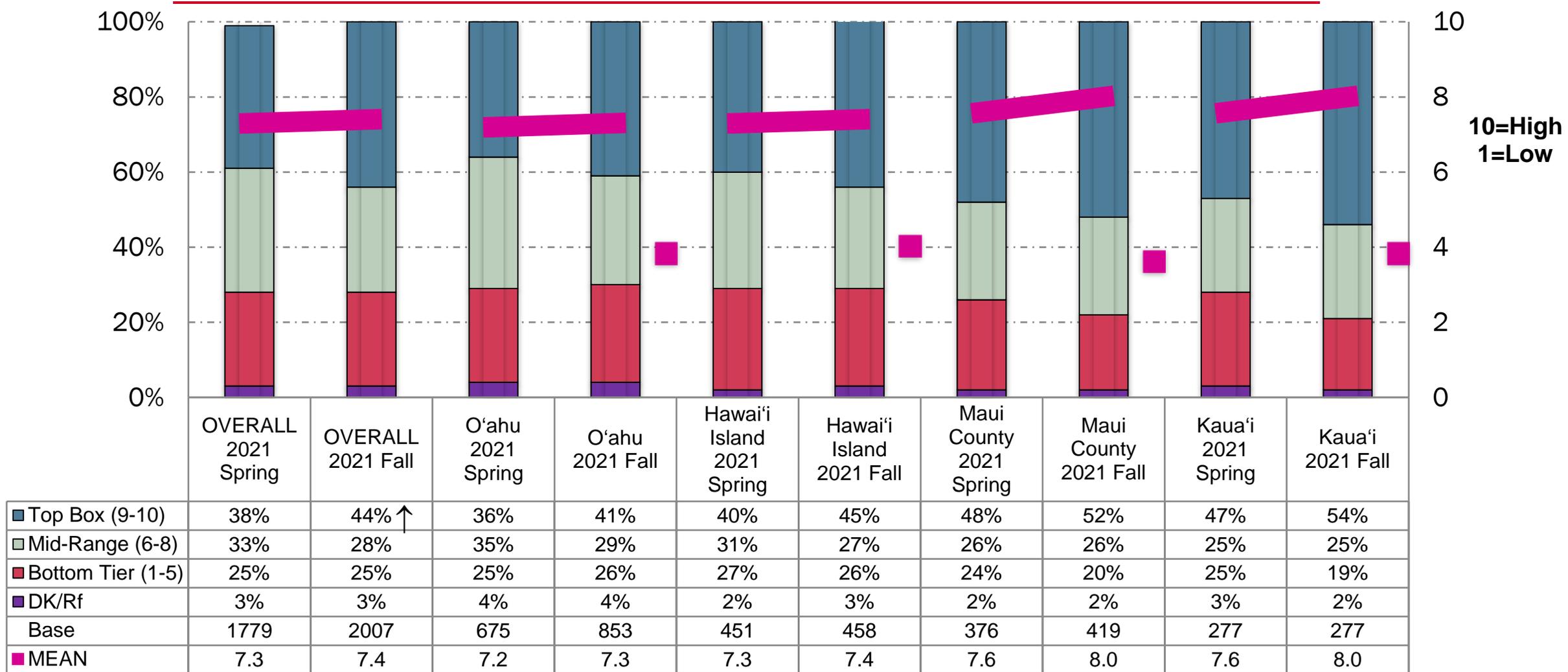
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



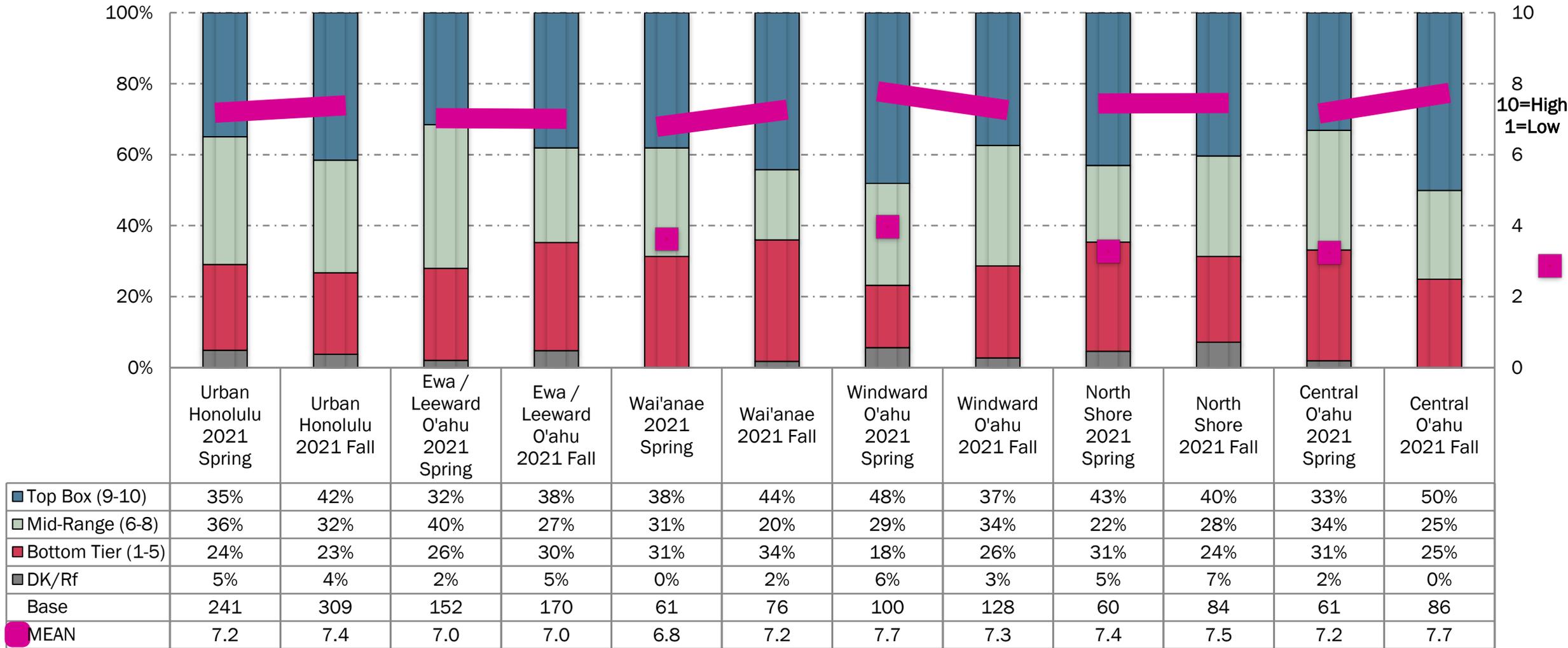
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



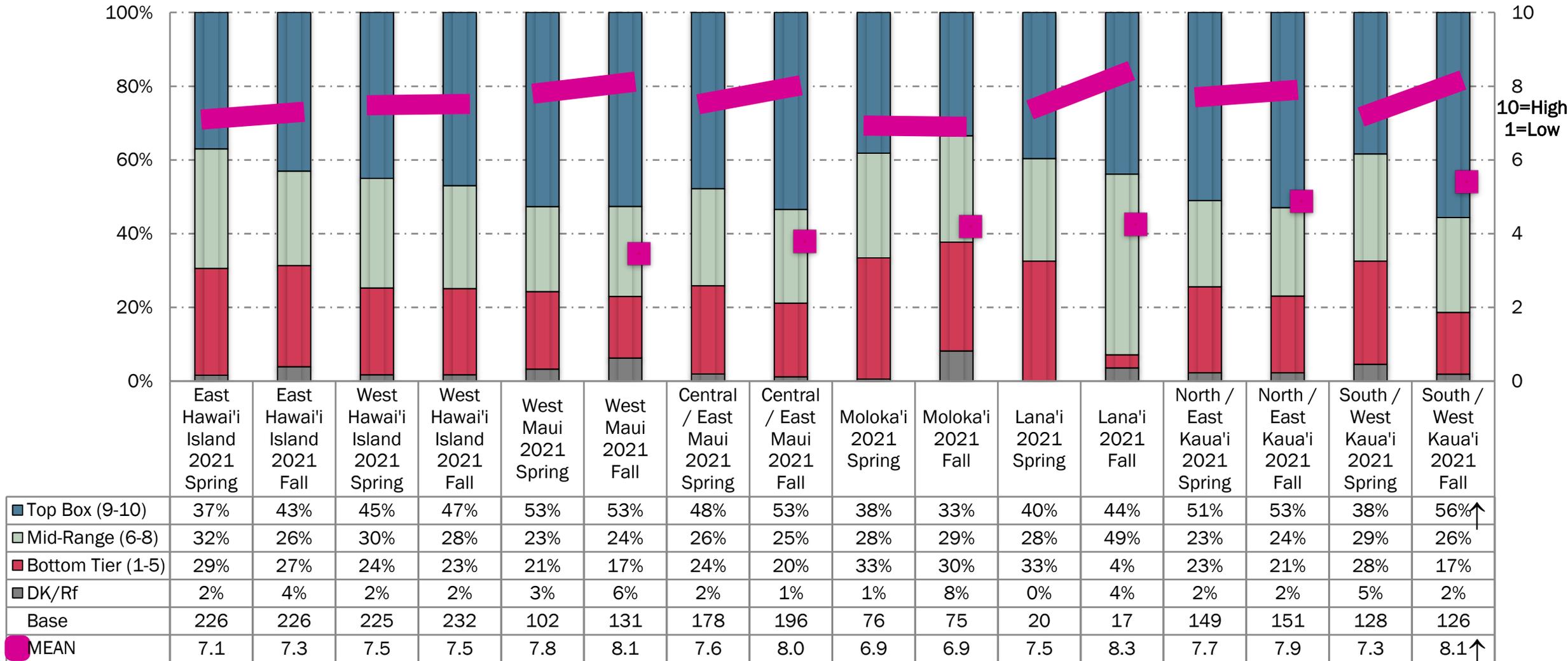
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



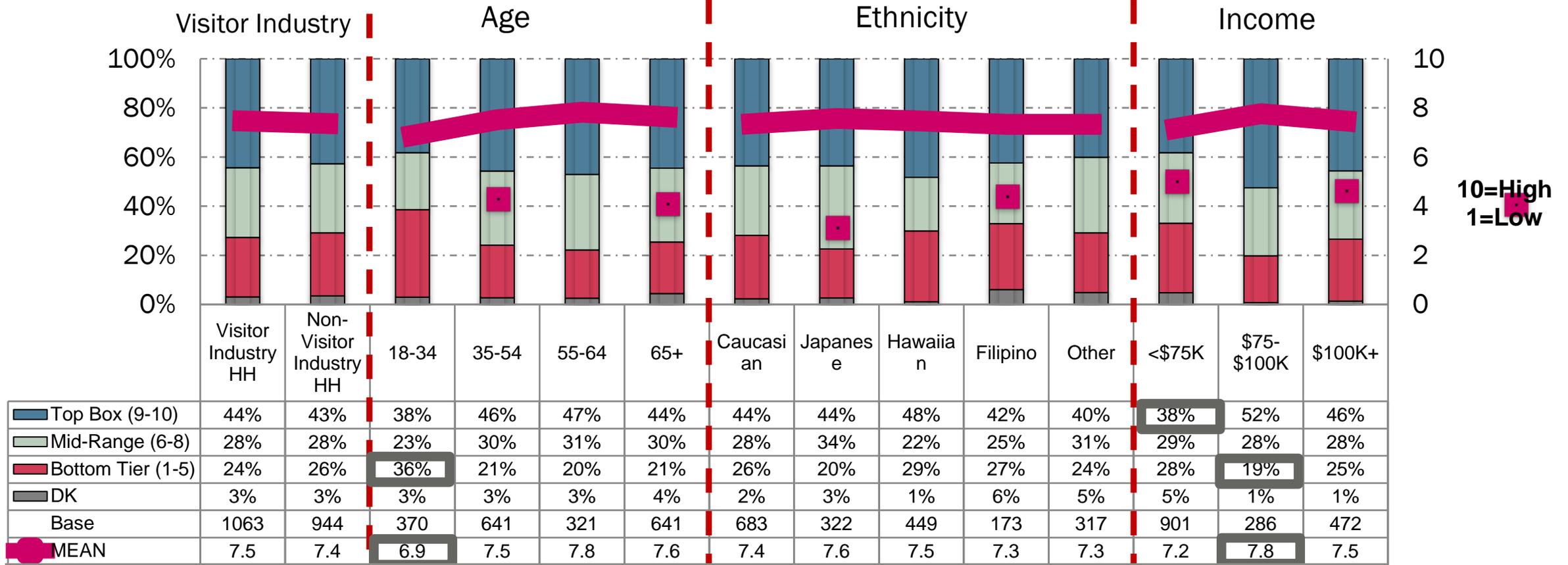
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Charge visitor access fees to state parks and trails” - *By Area* (*Hawai'i Island, Maui, & Kaua'i*)



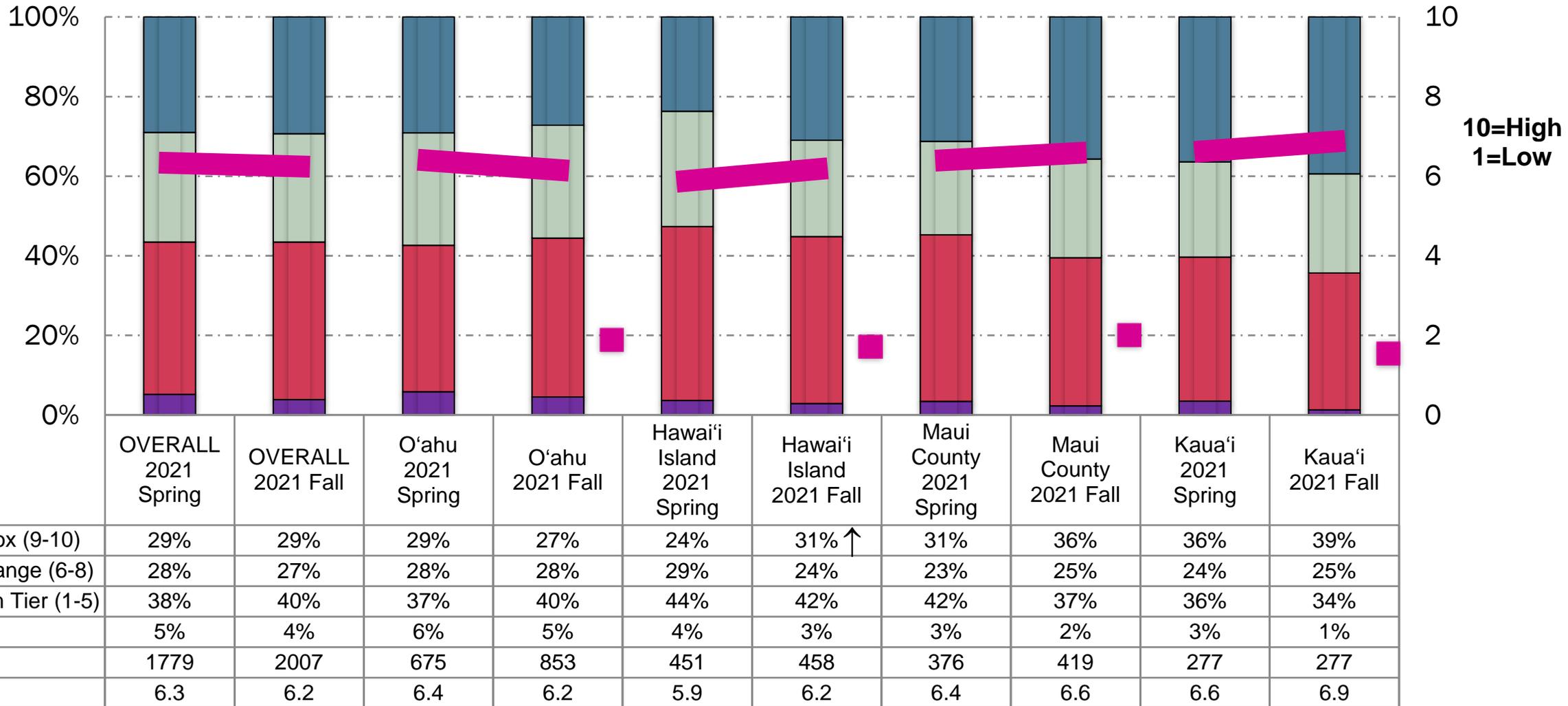
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



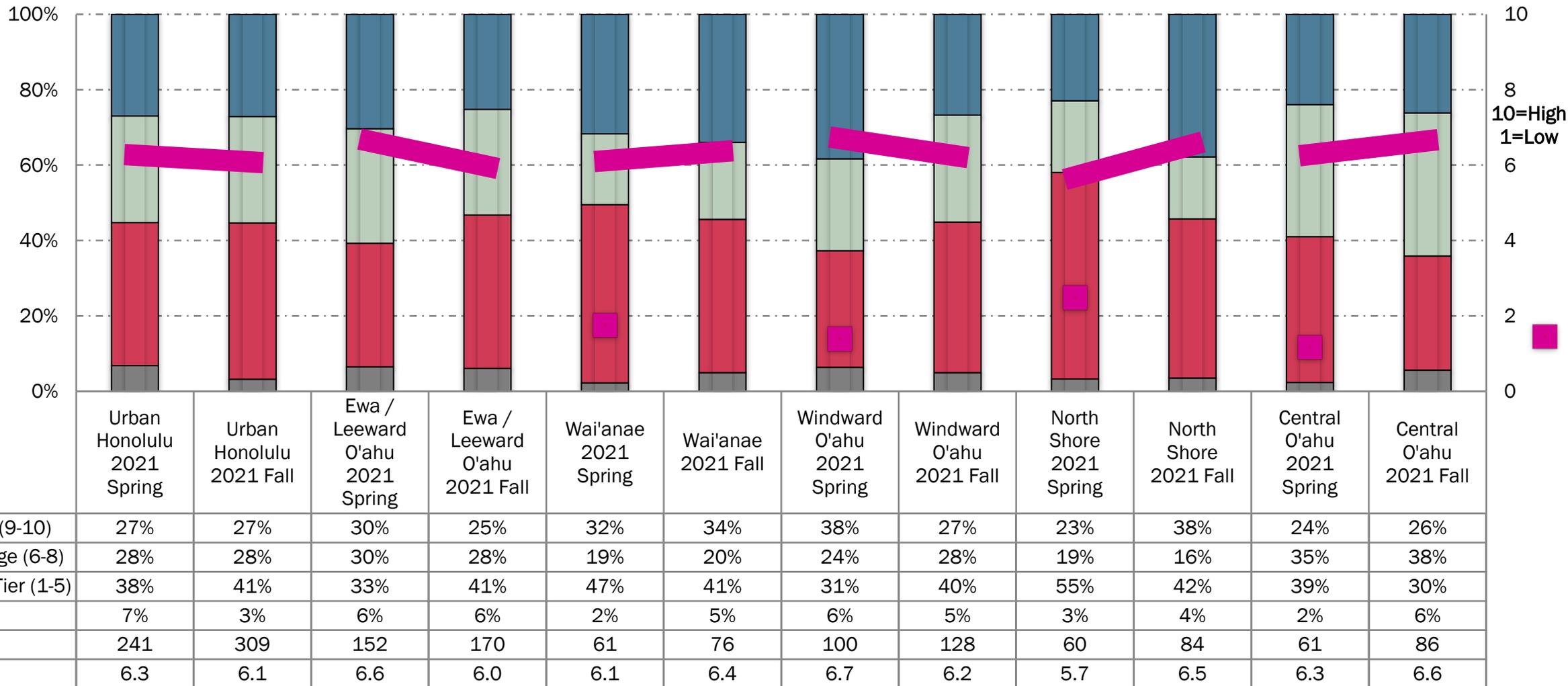
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



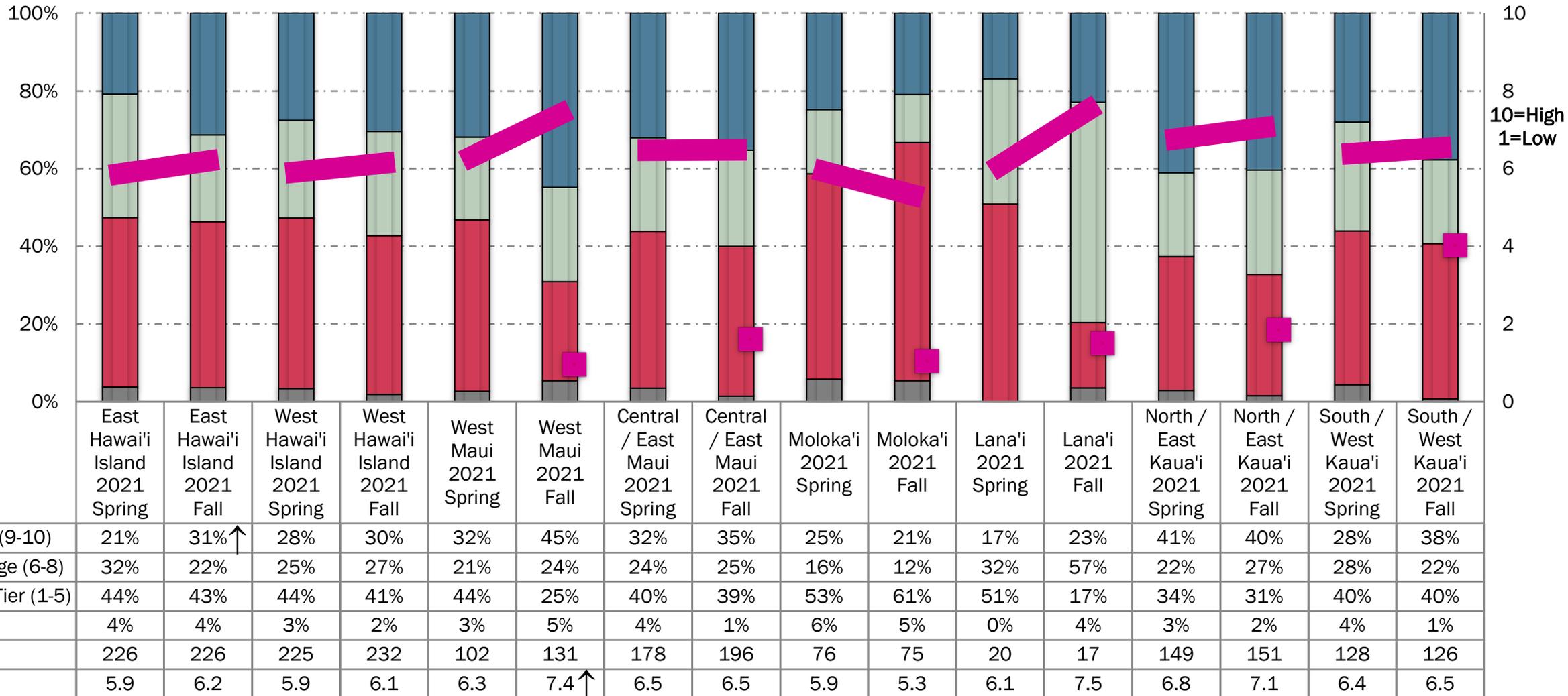
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



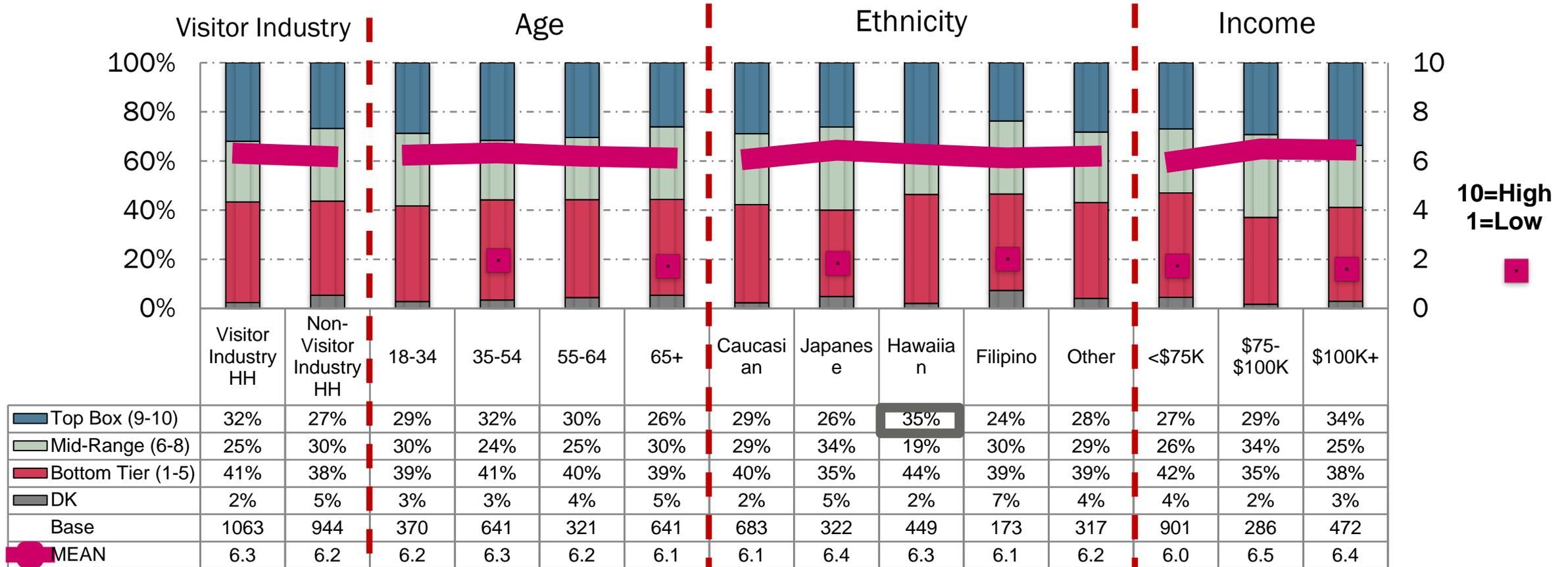
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



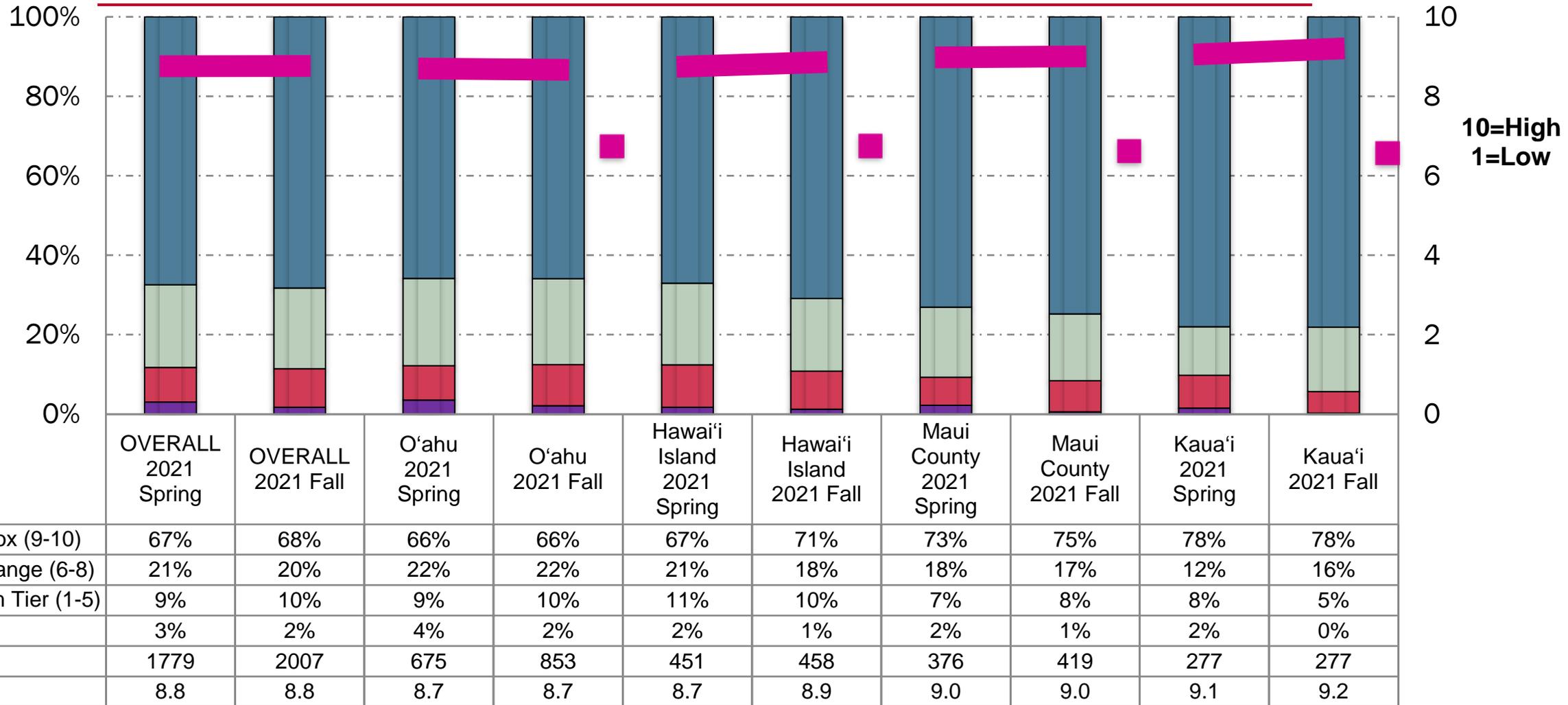
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



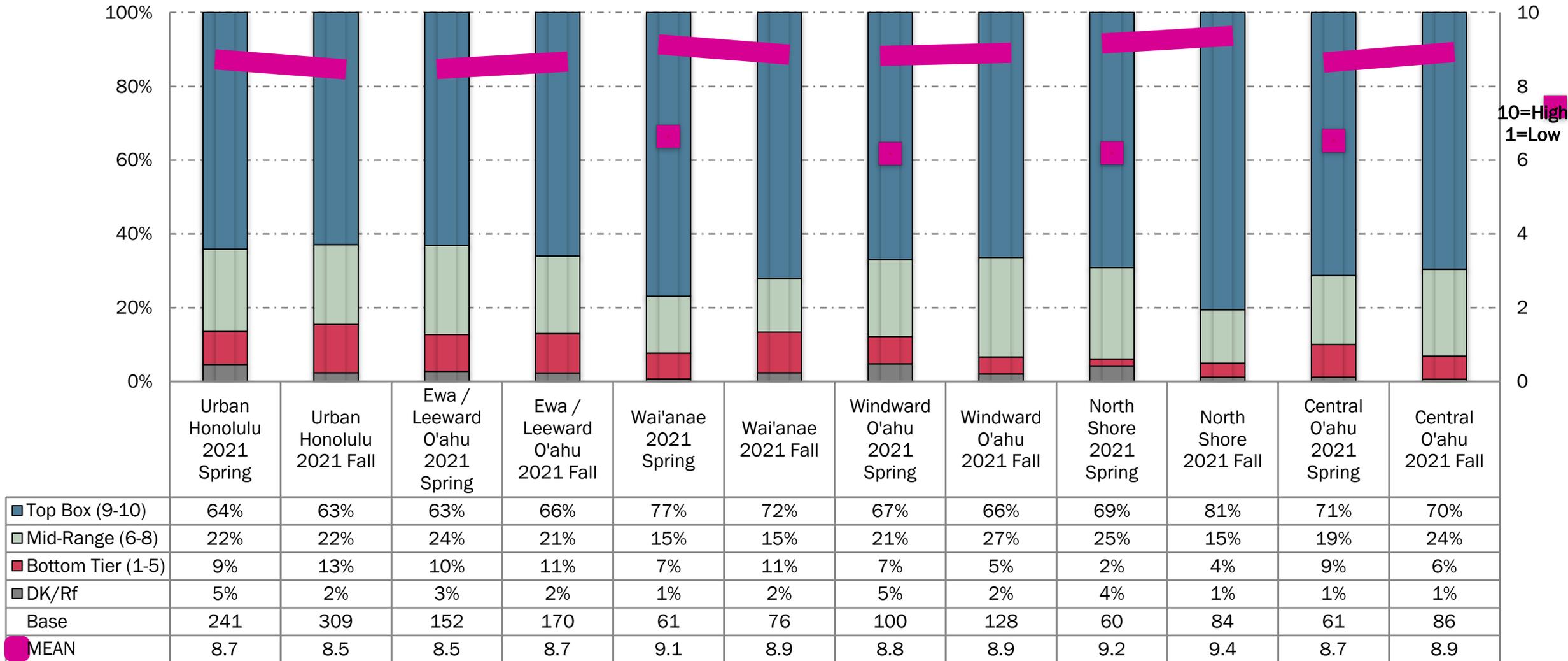
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



Q7. Legally, the state of Hawaii 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)*



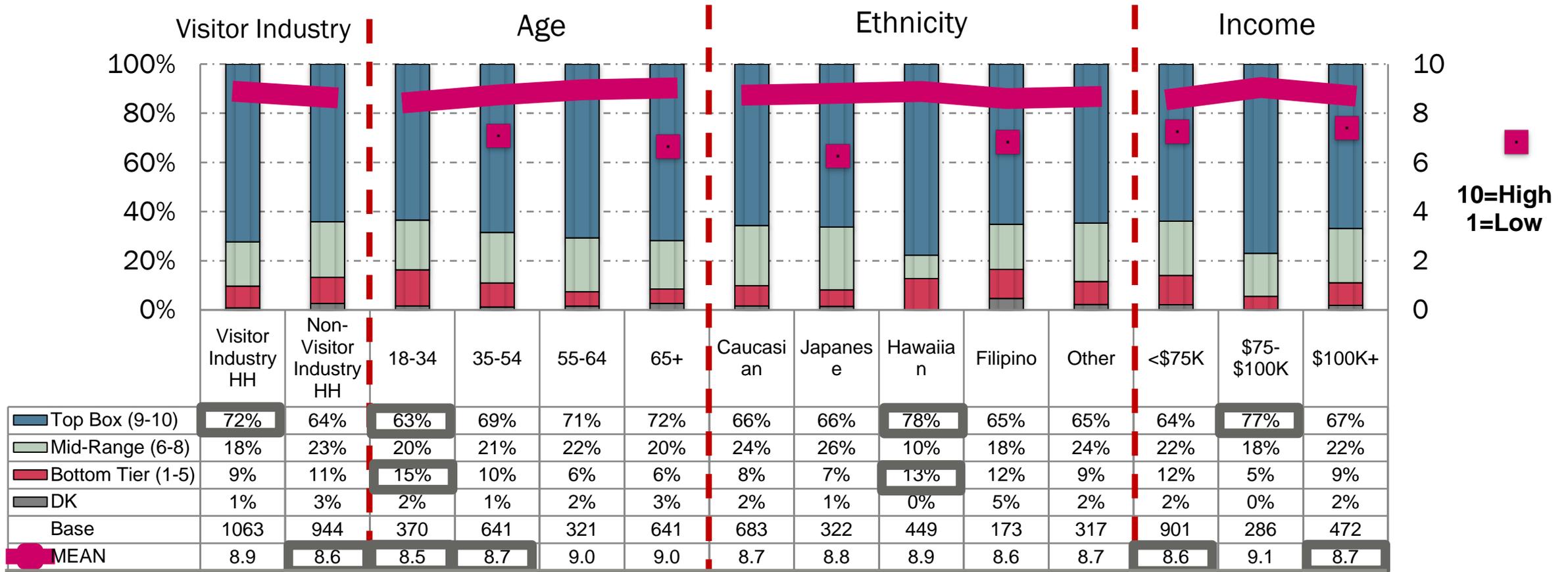
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



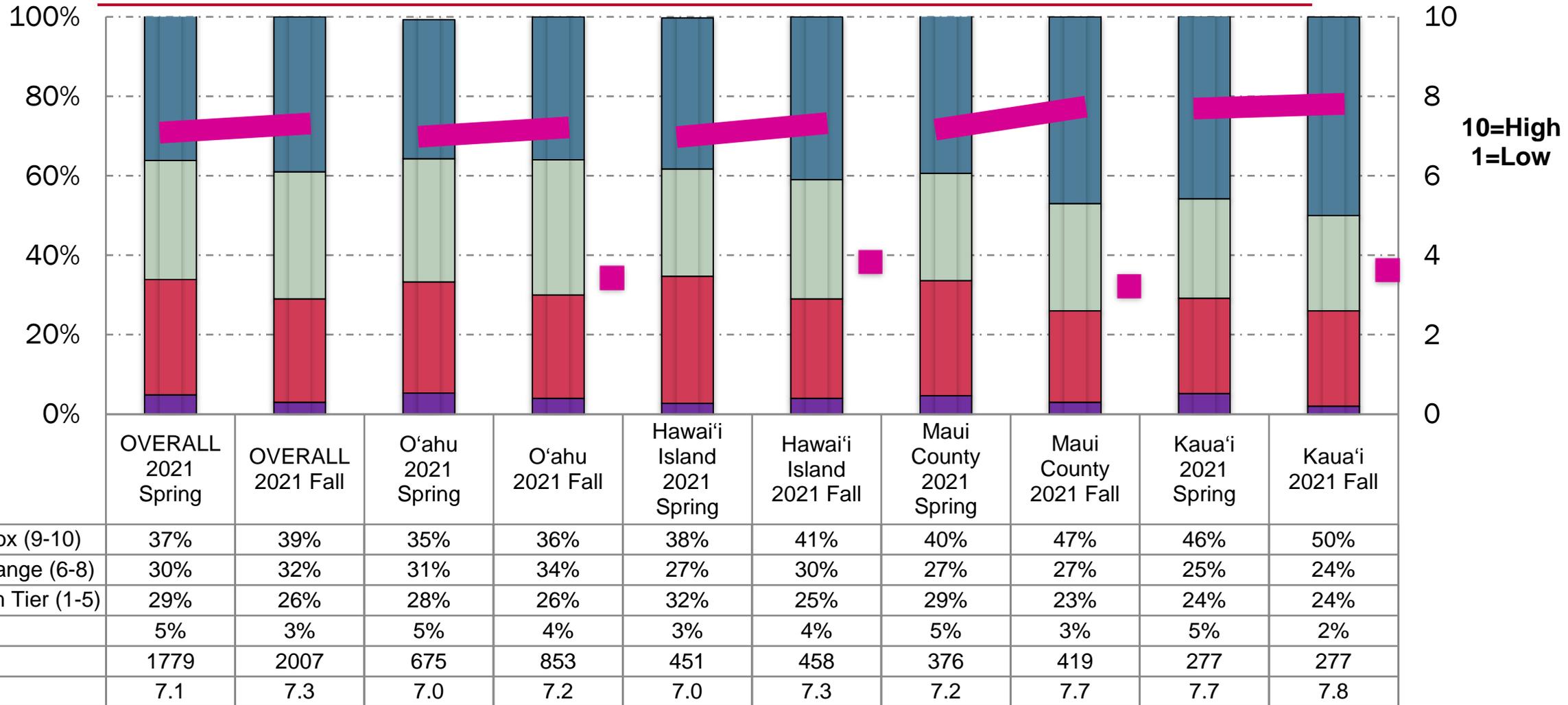
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



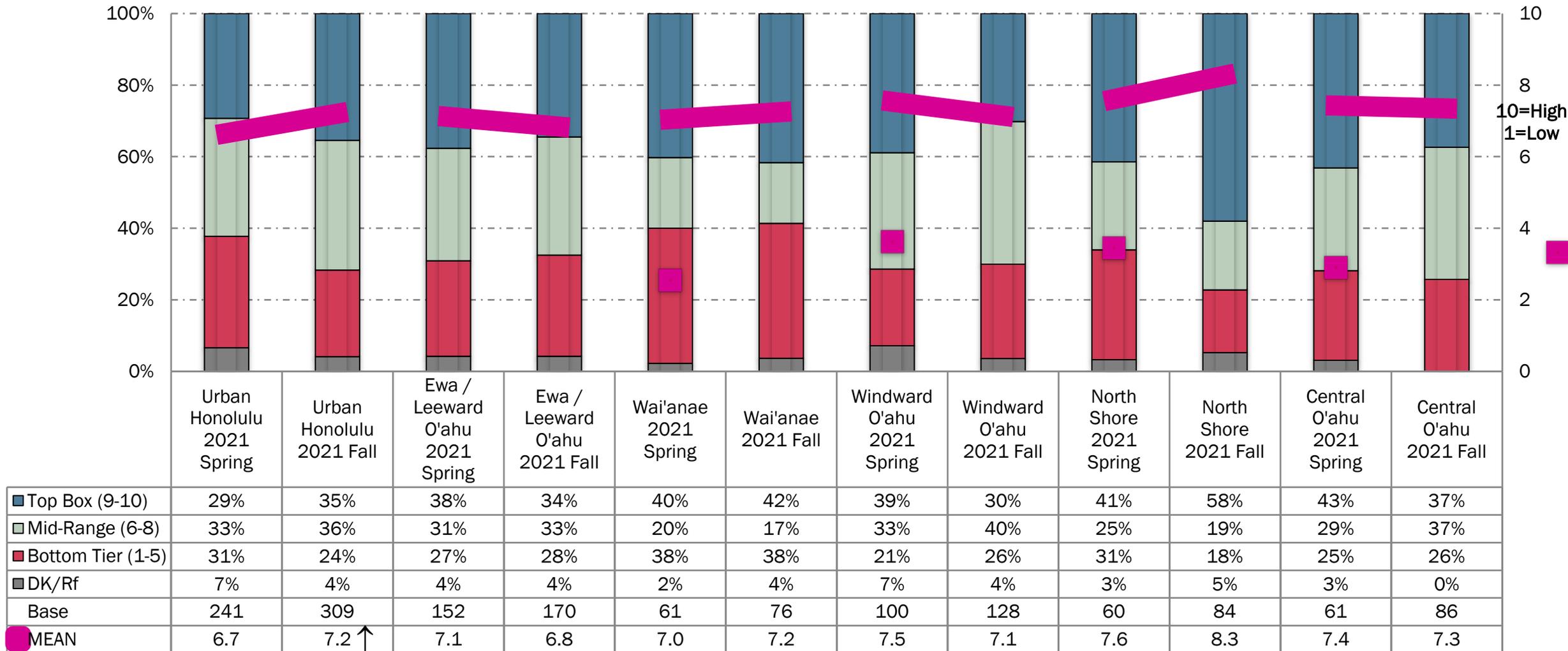
Q9. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

“Encourage visitors to volunteer and give back during their visits to Hawaii” – *By Island*



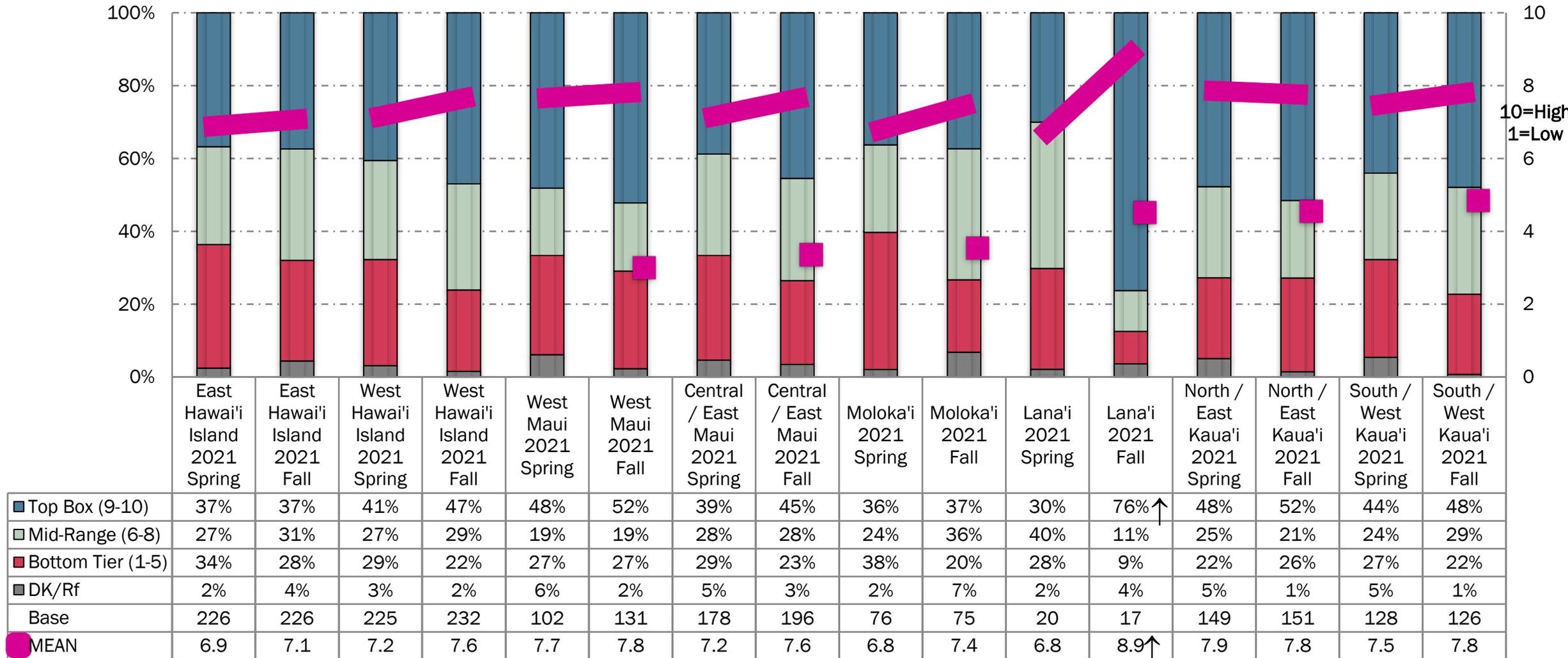
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



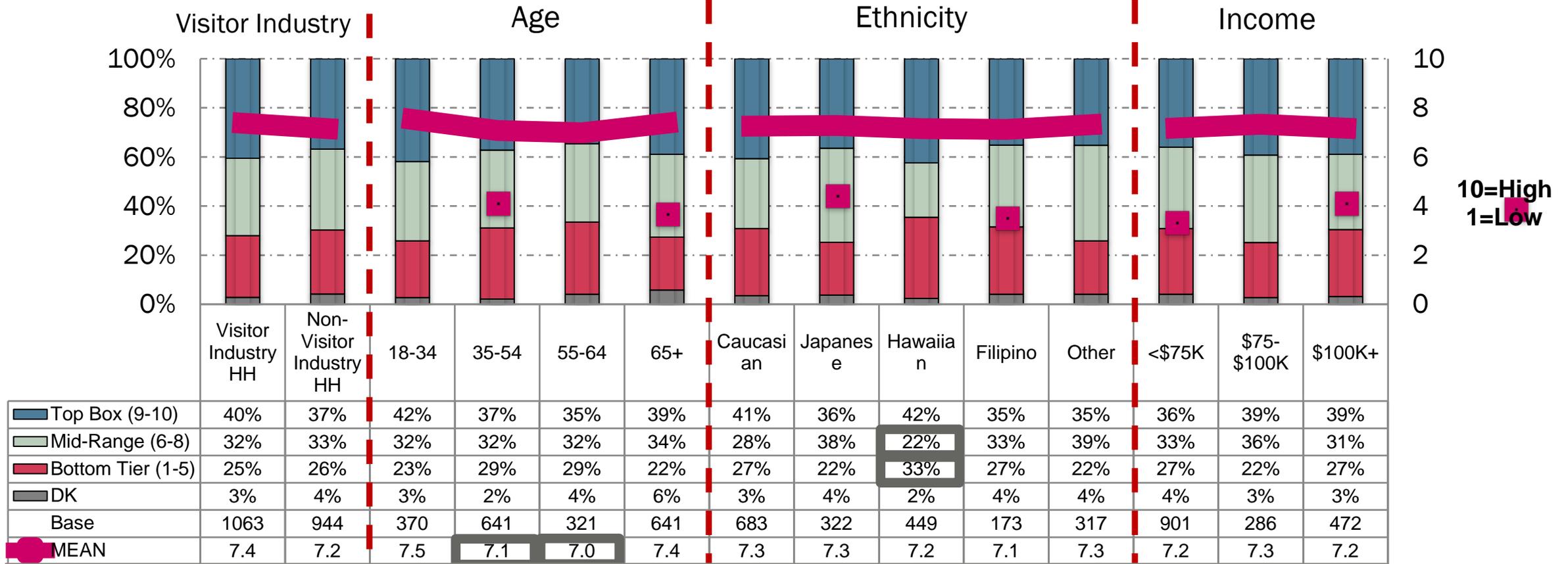
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



Q7. Legally, the state of Hawaii 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 Hawaii” – *By Demographics*

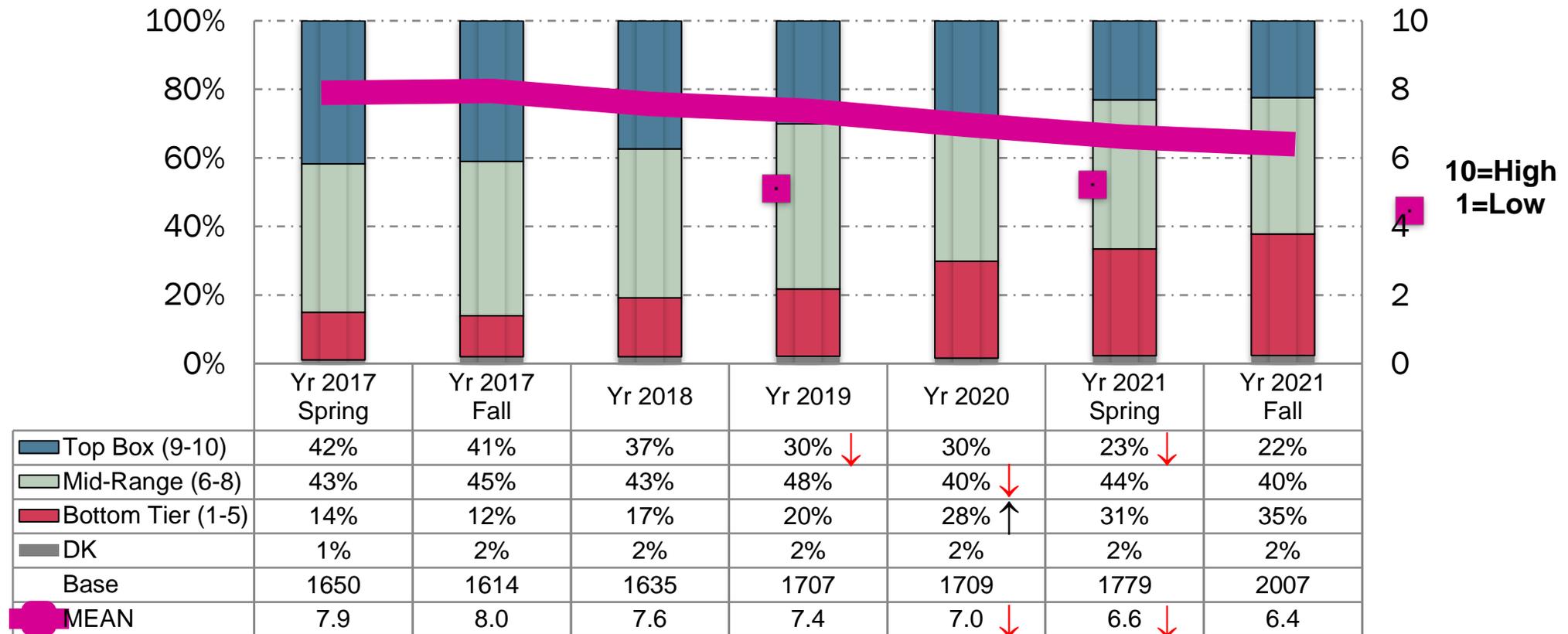


Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



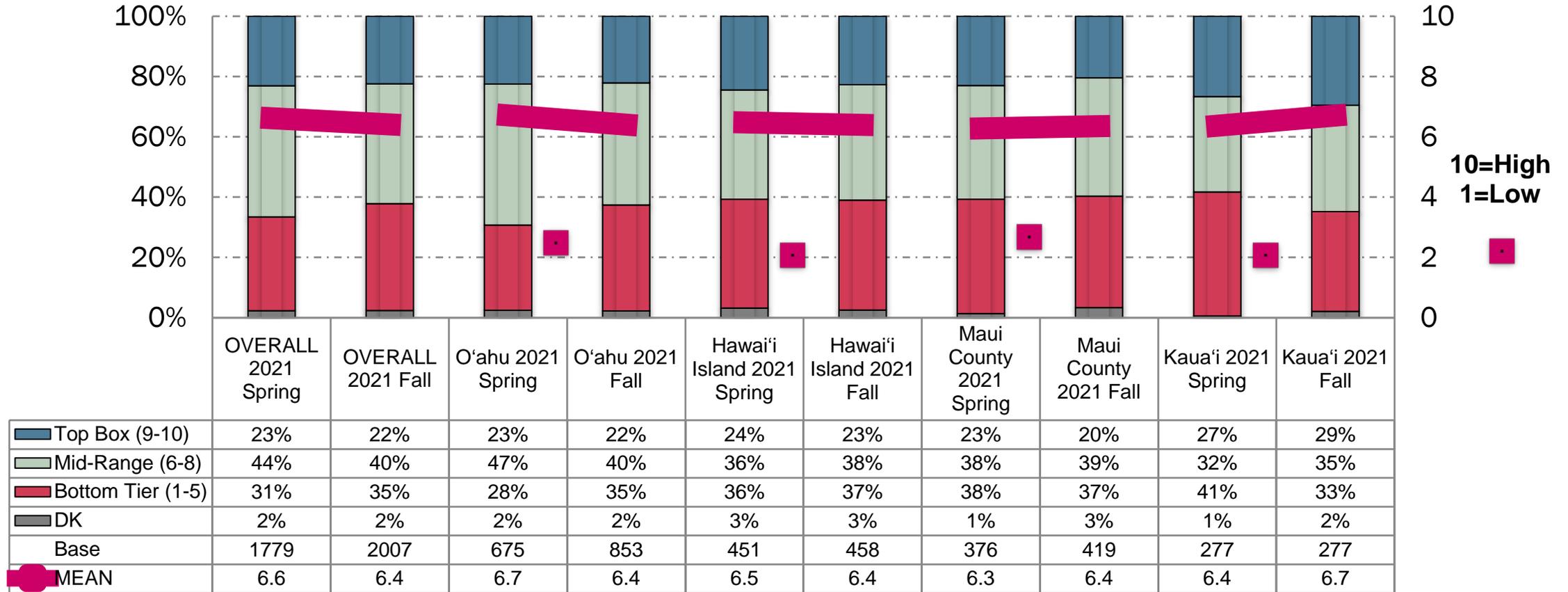
General Perceptions of the Visitor Industry

Perception of Tourism Industry in Hawai'i - Overall



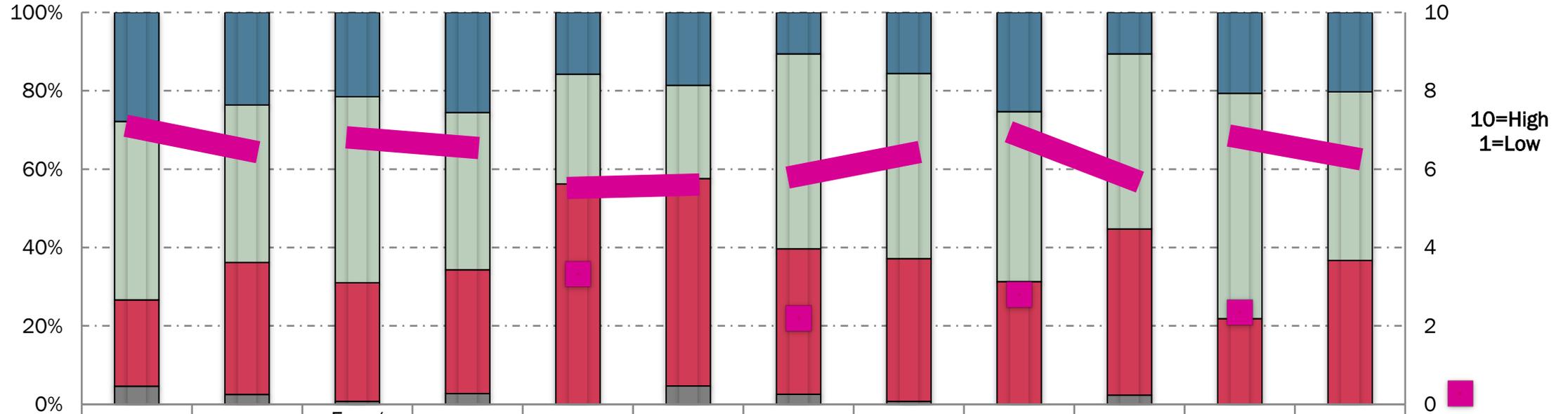
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



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?

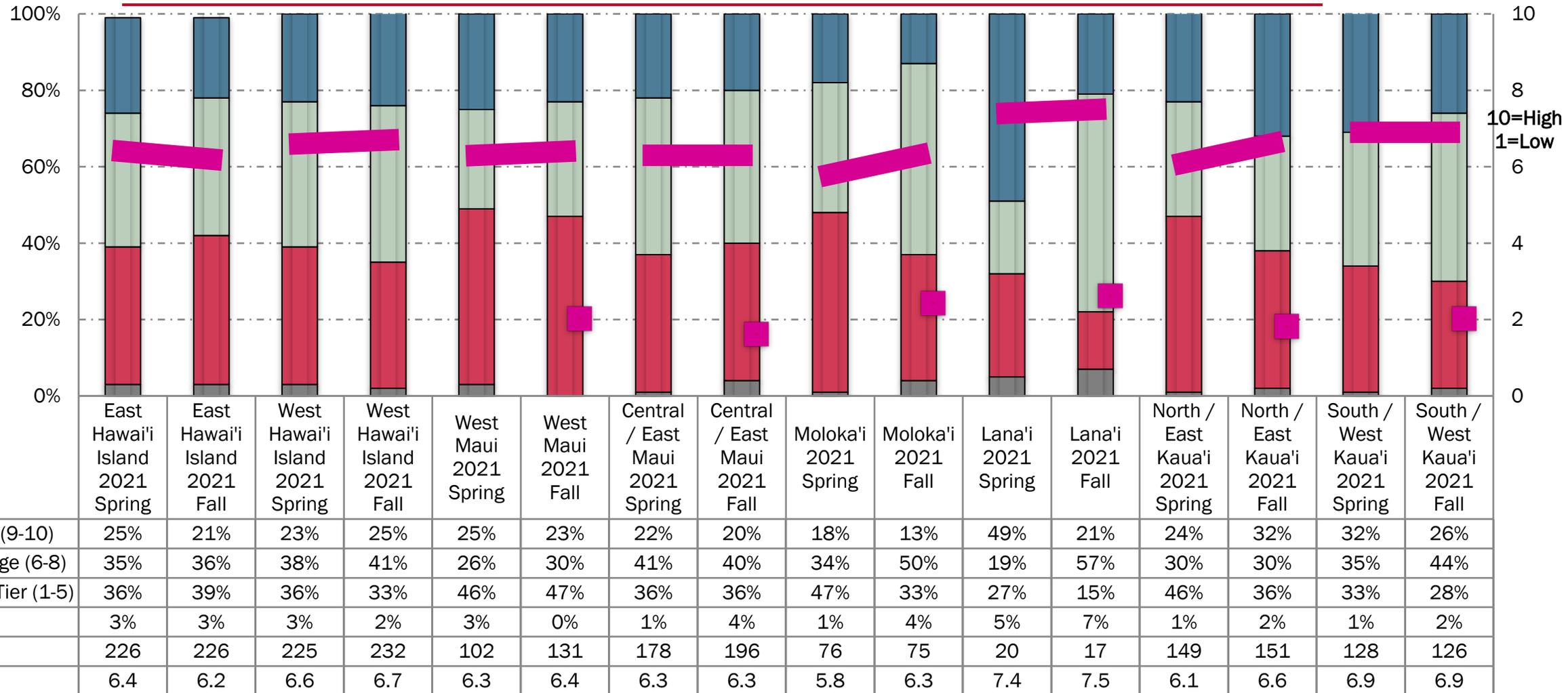
Perception of Tourism Industry in Hawai'i - *By Area (O'ahu)*



	Urban Honolulu 2021 Spring	Urban Honolulu 2021 Fall	Ewa / Leeward O'ahu 2021 Spring	Ewa / Leeward O'ahu 2021 Fall	Wai'anae 2021 Spring	Wai'anae 2021 Fall	Windward O'ahu 2021 Spring	Windward O'ahu 2021 Fall	North Shore 2021 Spring	North Shore 2021 Fall	Central O'ahu 2021 Spring	Central O'ahu 2021 Fall
Top Box (9-10)	28%	24%	22%	26%	16%	19%	11%	16%	25%	11%	21%	20%
Mid-Range (6-8)	46%	40%	47%	40%	28%	24%	50%	47%	43%	45%	58%	43%
Bottom Tier (1-5)	22%	34% ↑	30%	32%	56%	53%	37%	36%	31%	42%	22%	37%
DK/Rf	5%	2%	1%	3%	0%	5%	3%	1%	0%	2%	0%	0%
Base	241	309	152	170	61	76	100	128	60	84	61	86
MEAN	7.1	6.5	6.8	6.6	5.5	5.6	5.8	6.4	6.9	5.8	6.8	6.3

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?

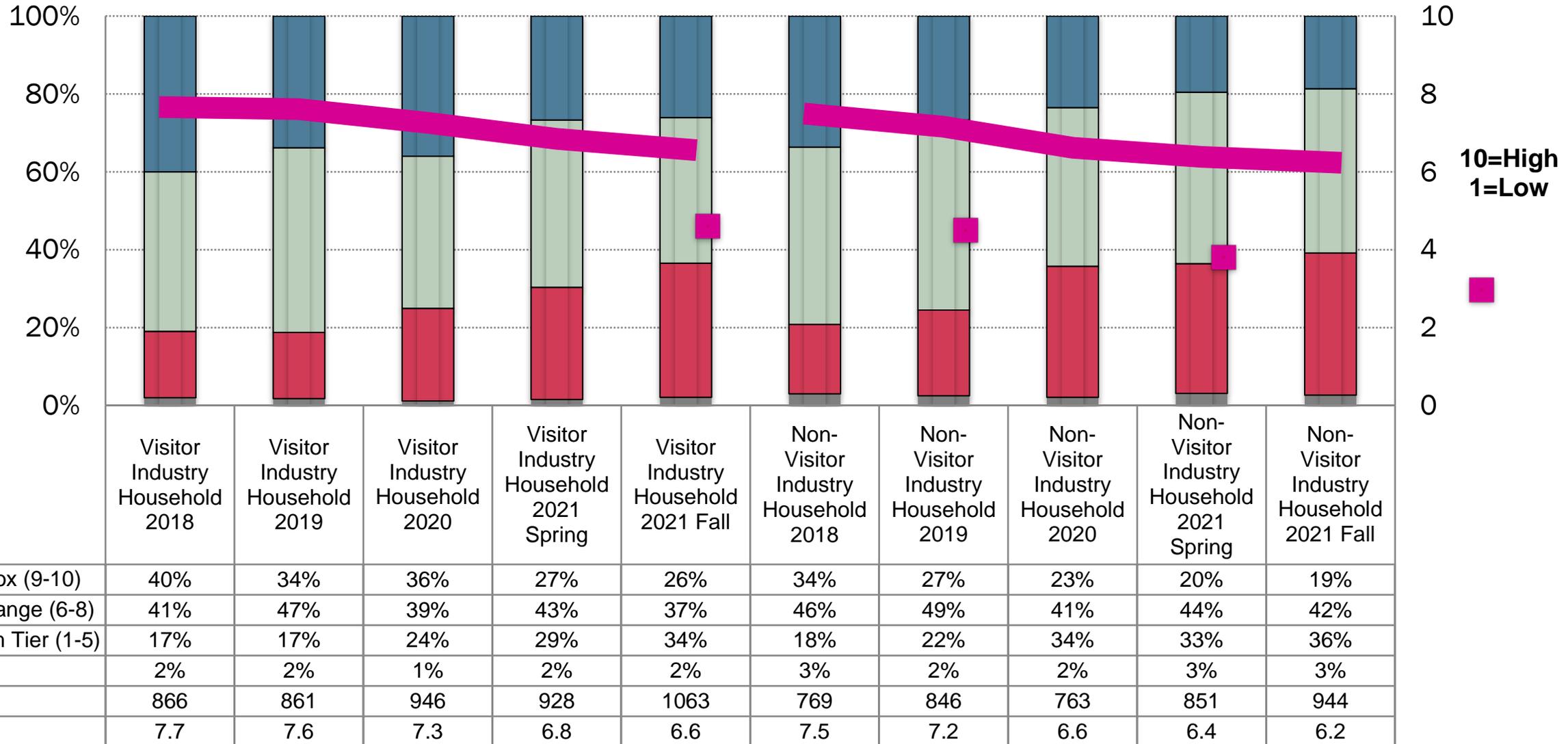
Perception of Tourism Industry in Hawai'i – *By Area (Hawai'i Island, Maui, & Kaua'i)*



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-

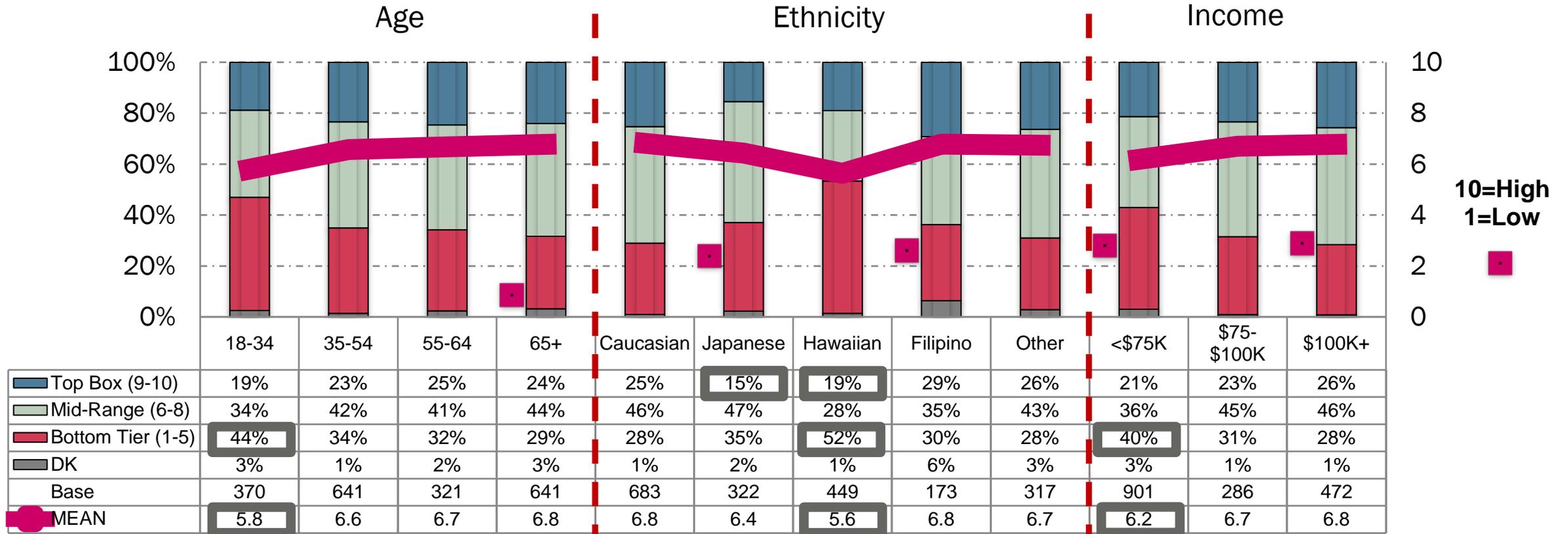
Visitor Industry Household vs Non-Visitor Industry Household



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?

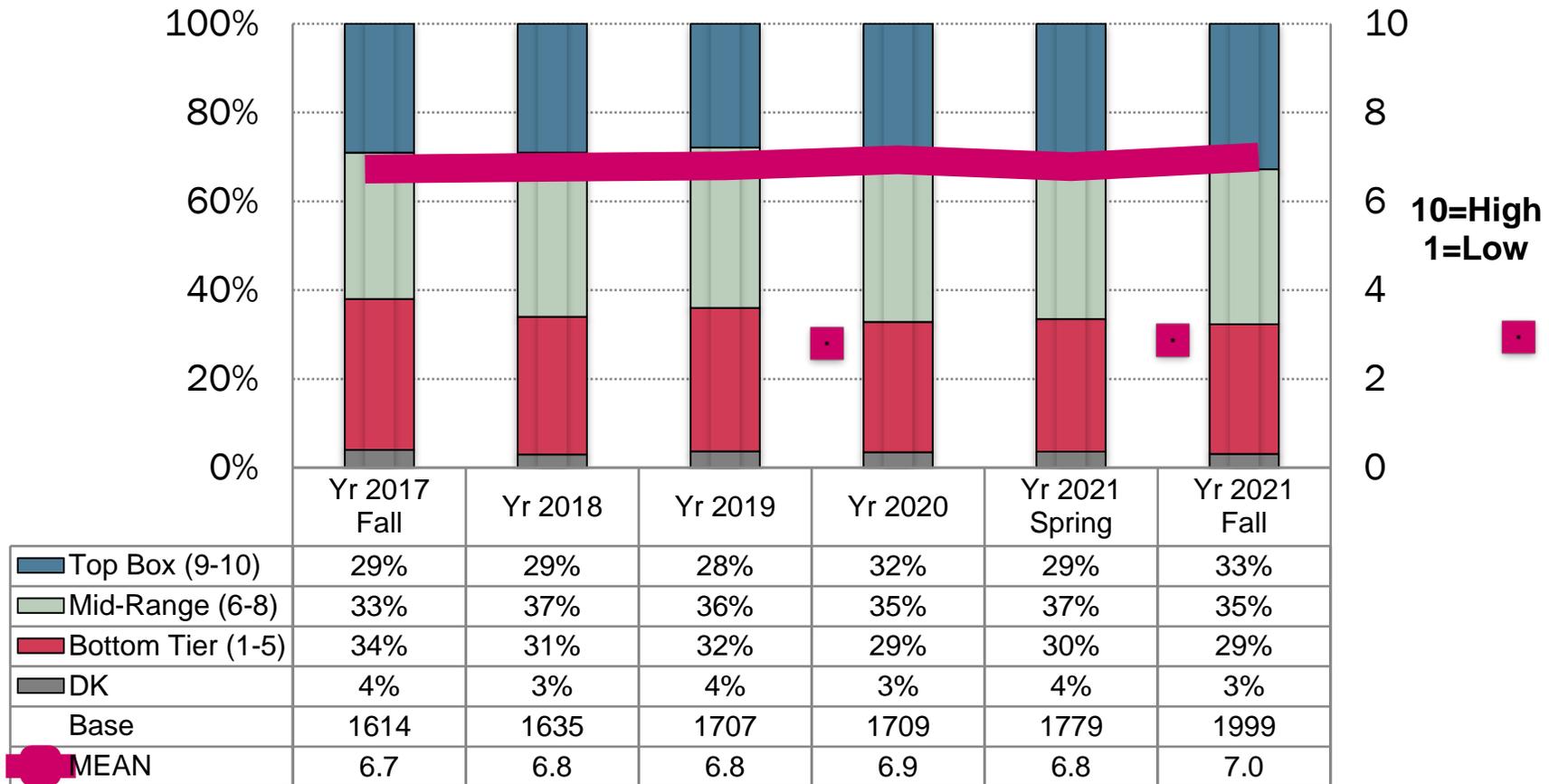
Perception of Tourism Industry in Hawai'i

- *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.

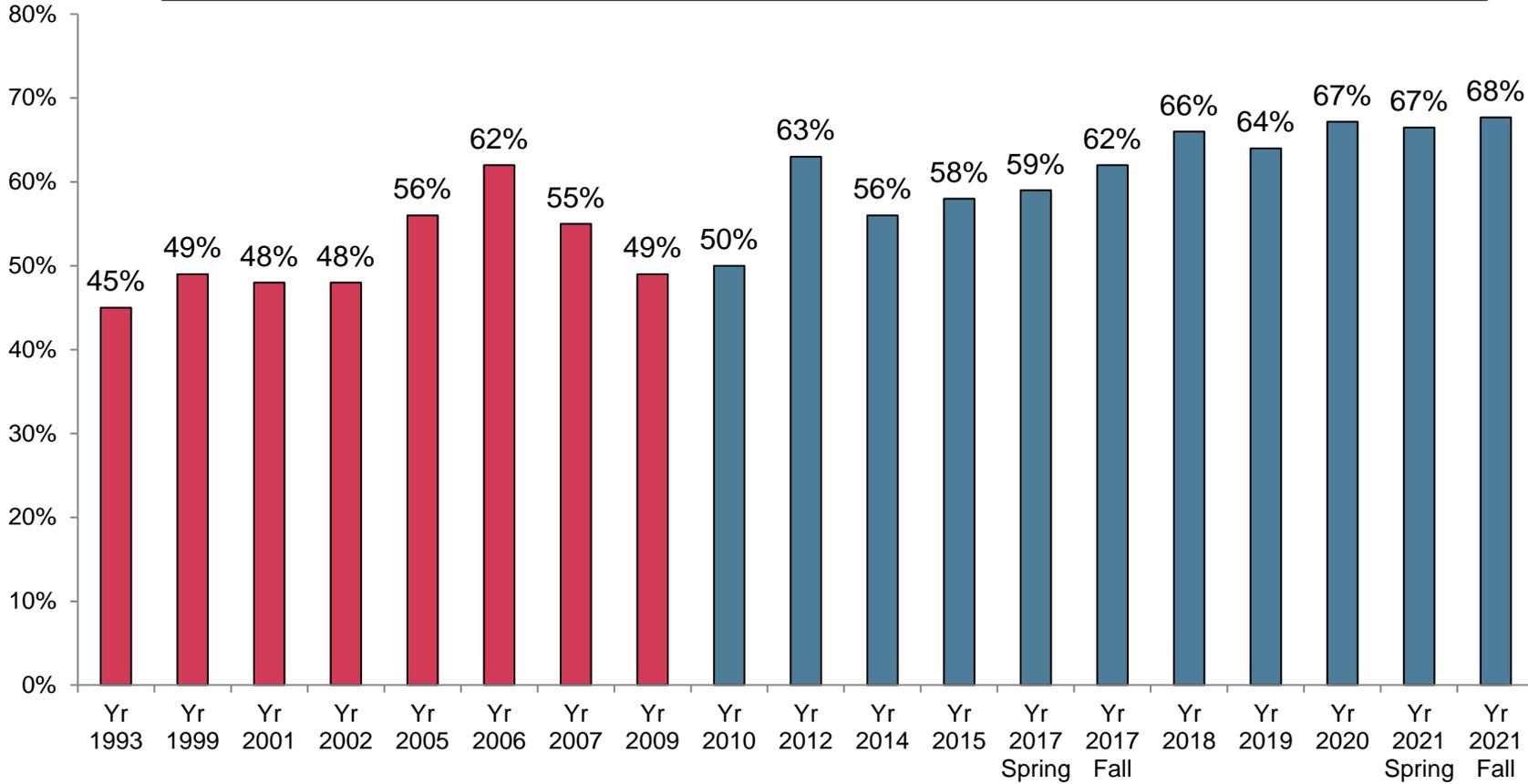
“This island is being run for tourists at the expense of local people” – Overall”



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*

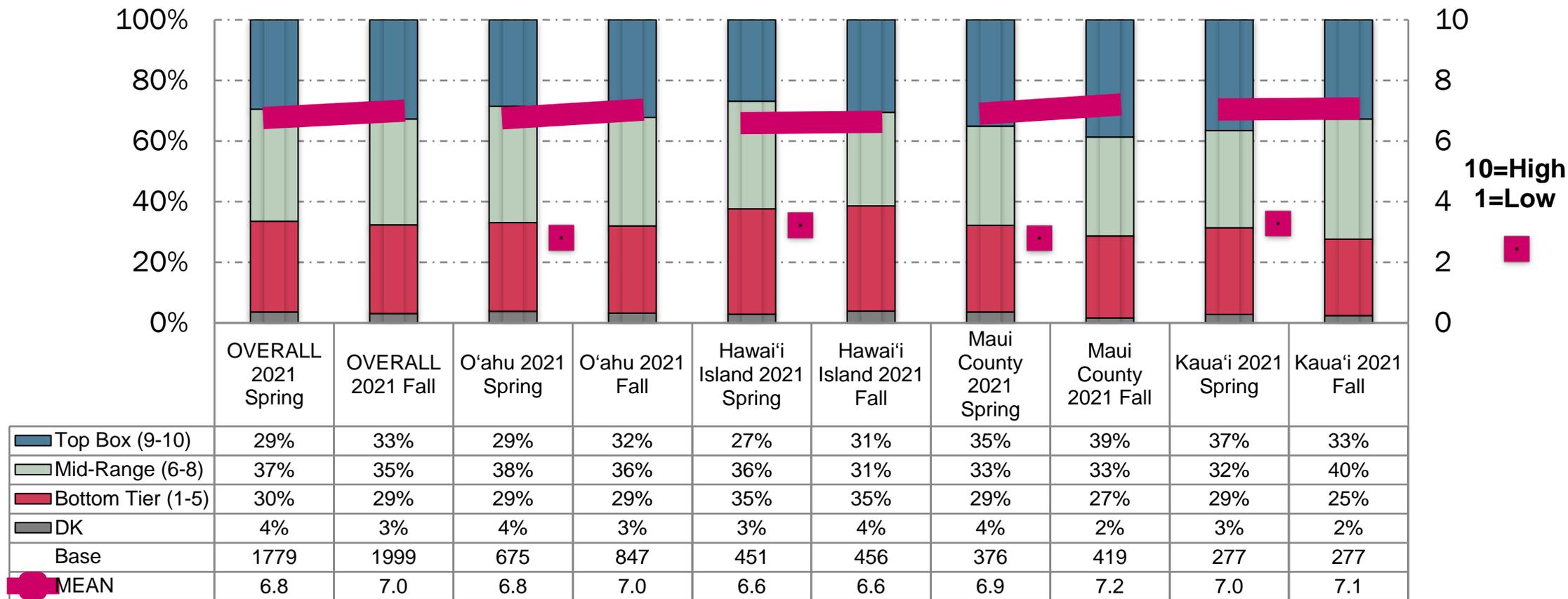
% strongly/ somewhat agree island is being run for tourists at expense of local people



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.

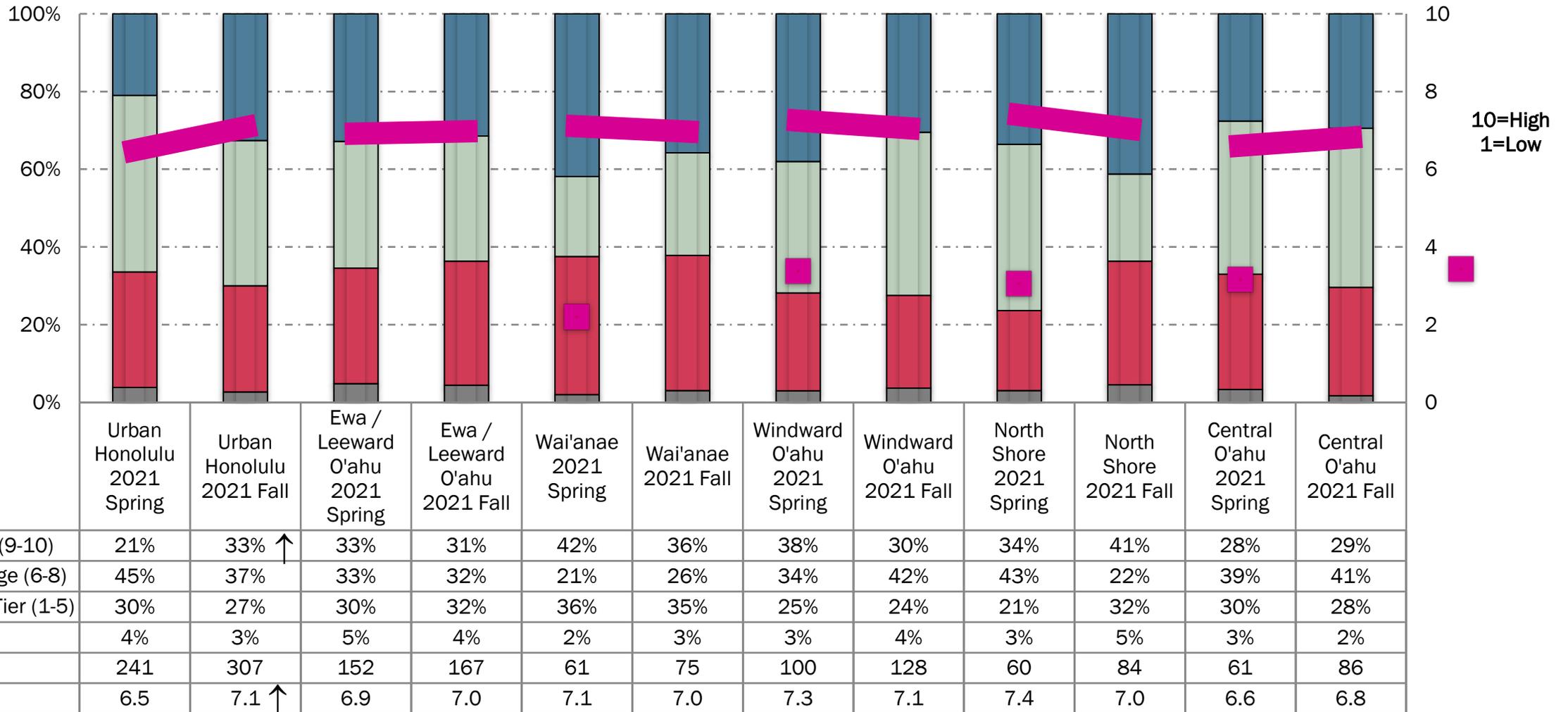
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



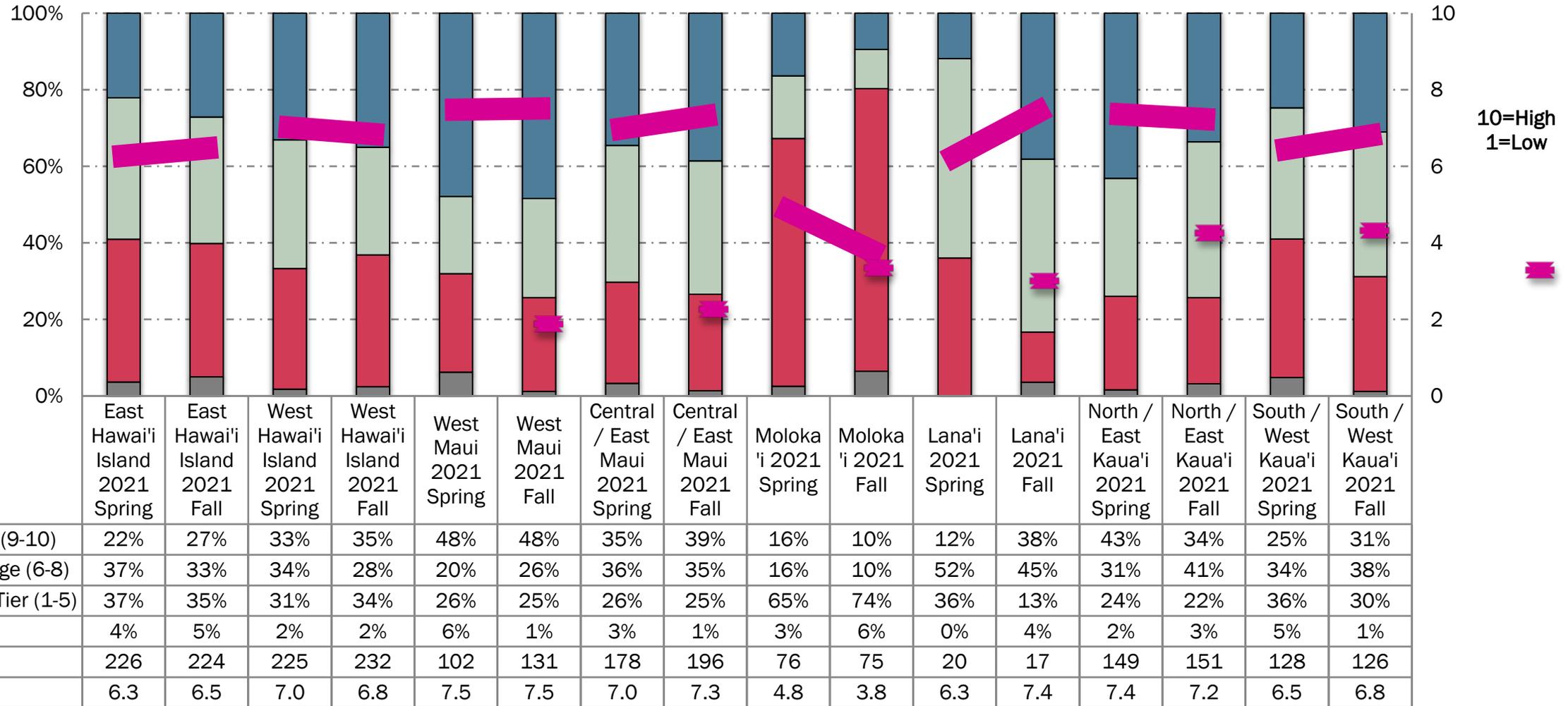
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“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...?

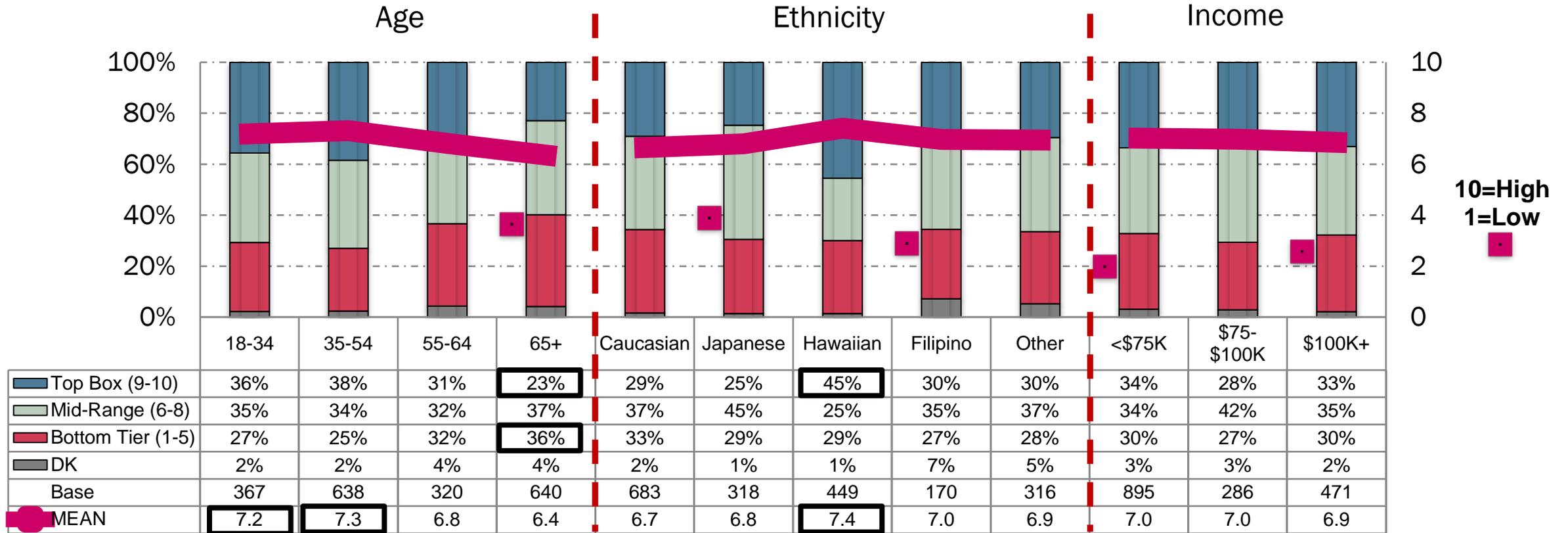
“This island is being run for tourists at the expense of local people” – By Area (Hawai'i Island, Maui, & Kaua'i)



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.

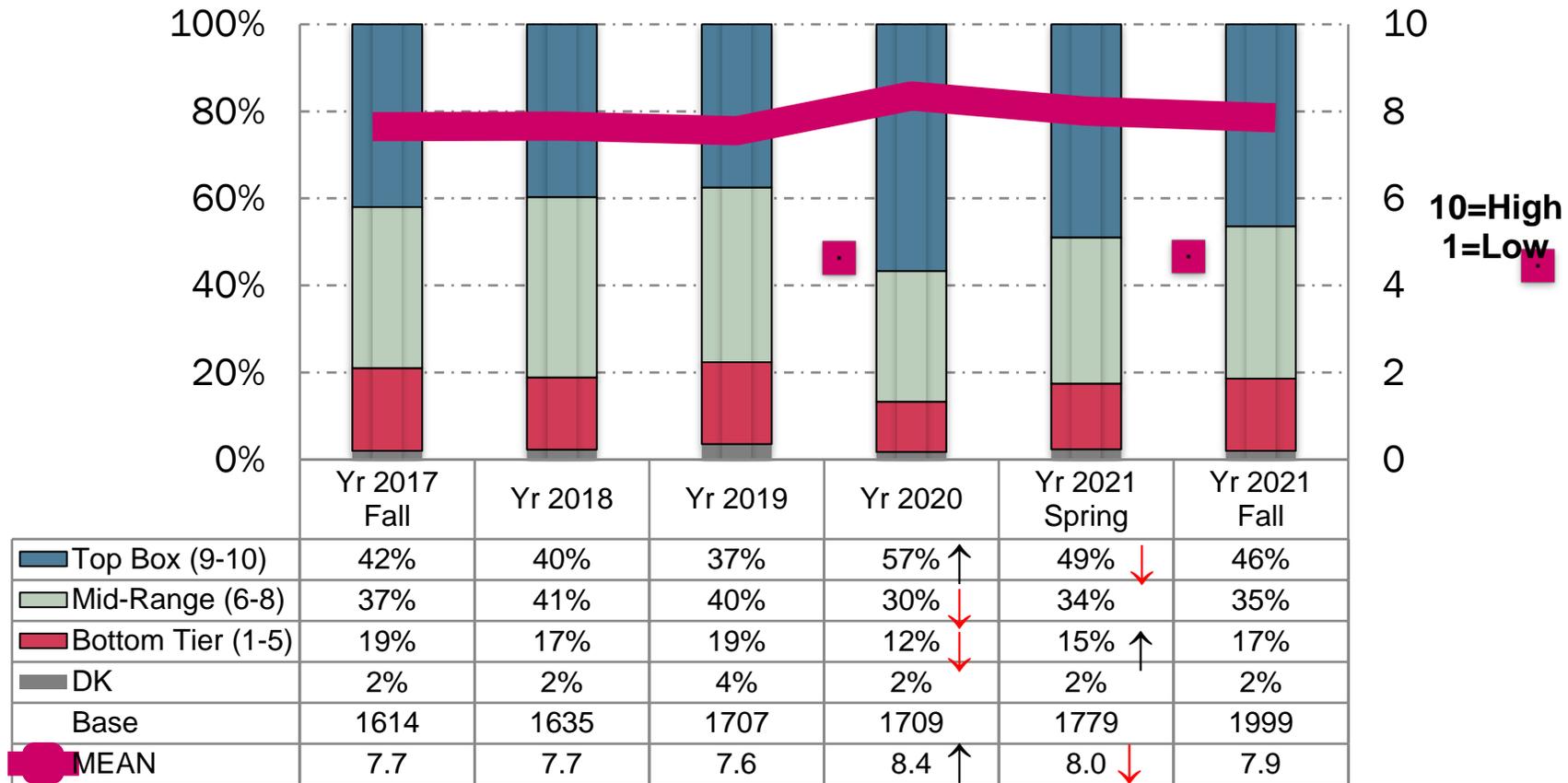
“This island is being run for tourists at the expense of local people”

– *By Demographics*



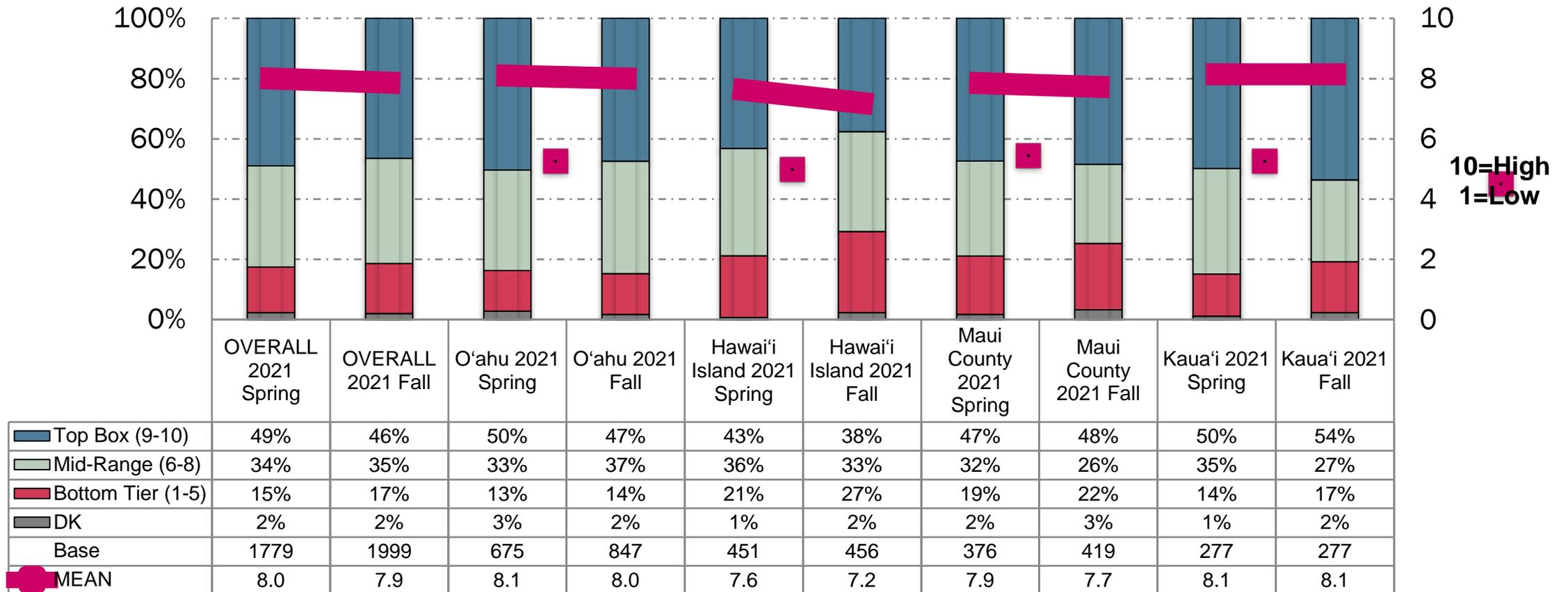
Q4.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“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 Island*



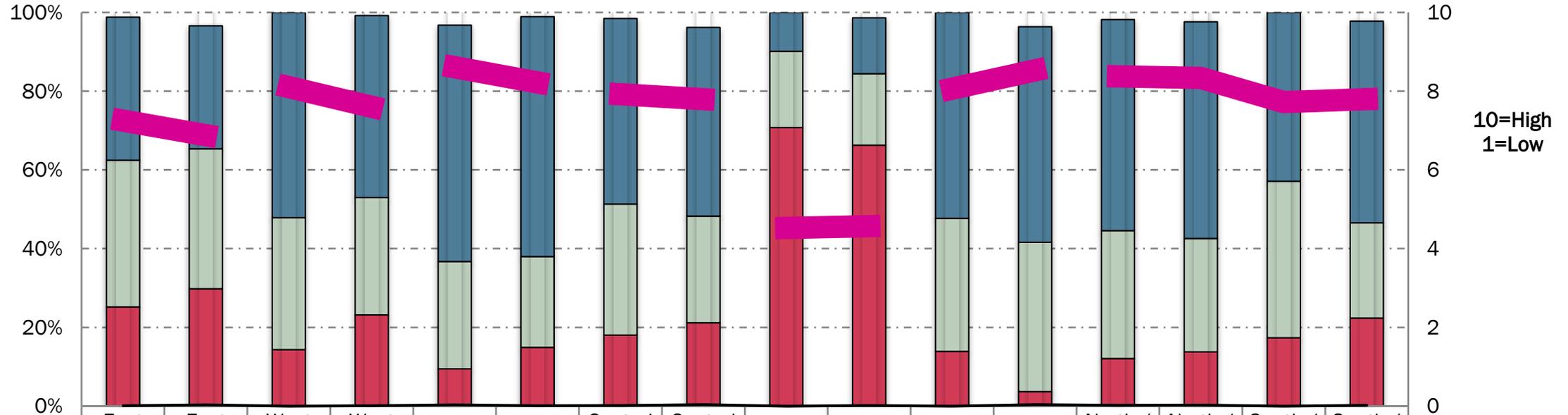
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“My Island’s economy is too dependent on tourism” – *By Area* (Hawai’i Island, Maui, & Kaua’i)

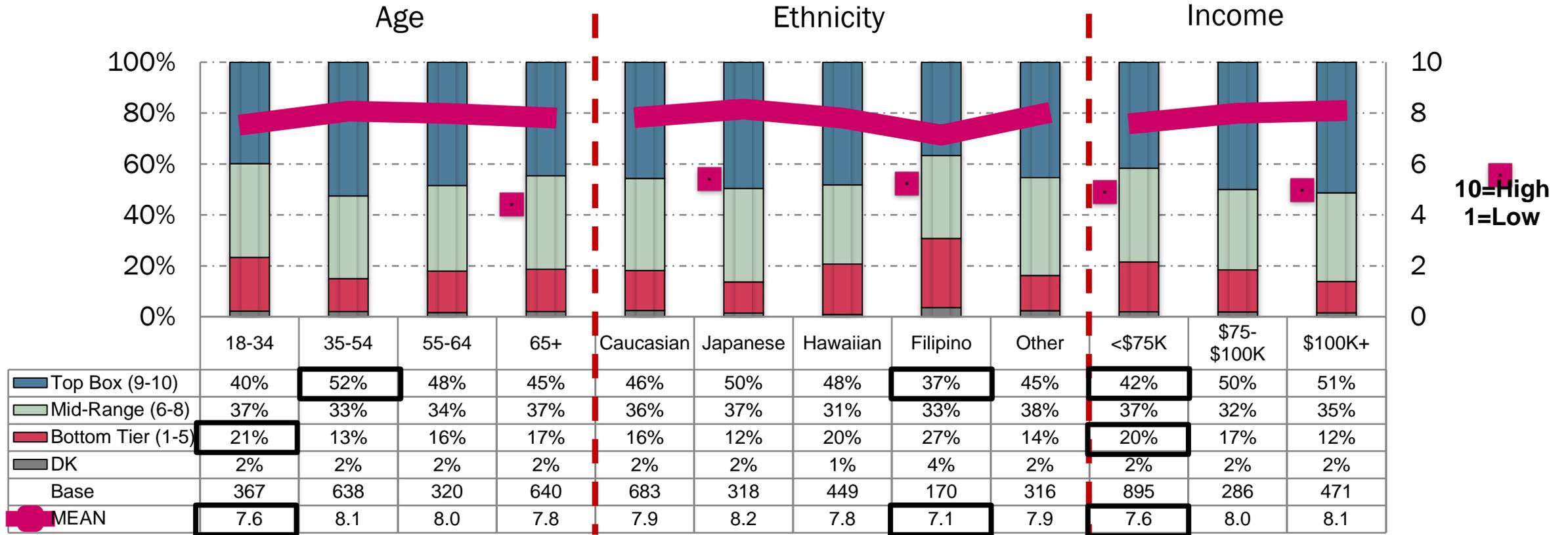


	East Hawai'i Island 2021 Spring	East Hawai'i Island 2021 Fall	West Hawai'i Island 2021 Spring	West Hawai'i Island 2021 Fall	West Maui 2021 Spring	West Maui 2021 Fall	Central / East Maui 2021 Spring	Central / East Maui 2021 Fall	Moloka'i 2021 Spring	Moloka'i 2021 Fall	Lana'i 2021 Spring	Lana'i 2021 Fall	North / East Kaua'i 2021 Spring	North / East Kaua'i 2021 Fall	South / West Kaua'i 2021 Spring	South / West Kaua'i 2021 Fall
Top Box (9-10)	36%	31%	52%	46%	60%	61%	47%	48%	10%	14%	52%	55%	54%	55%	43%	51%
Mid-Range (6-8)	37%	36%	34%	30%	27%	23%	33%	27%	19%	18%	34%	38%	32%	29%	40%	24%
Bottom Tier (1-5)	25%	30%	14%	23%	9%	15%	18%	21%	71%	66%	14%	4%	12%	14%	17%	22%
Base	226	226	225	232	102	131	178	196	76	75	20	17	149	151	128	126
DK/Rf	1%	3%	0%	1%	3%	1%	2%	4%	0%	1%	0%	4%	2%	2%	0%	2%
MEAN	7.3	6.9	8.1	7.6	8.6	8.2	7.9	7.8	4.5	4.6	8.1	8.5	8.4	8.3	7.7	7.8

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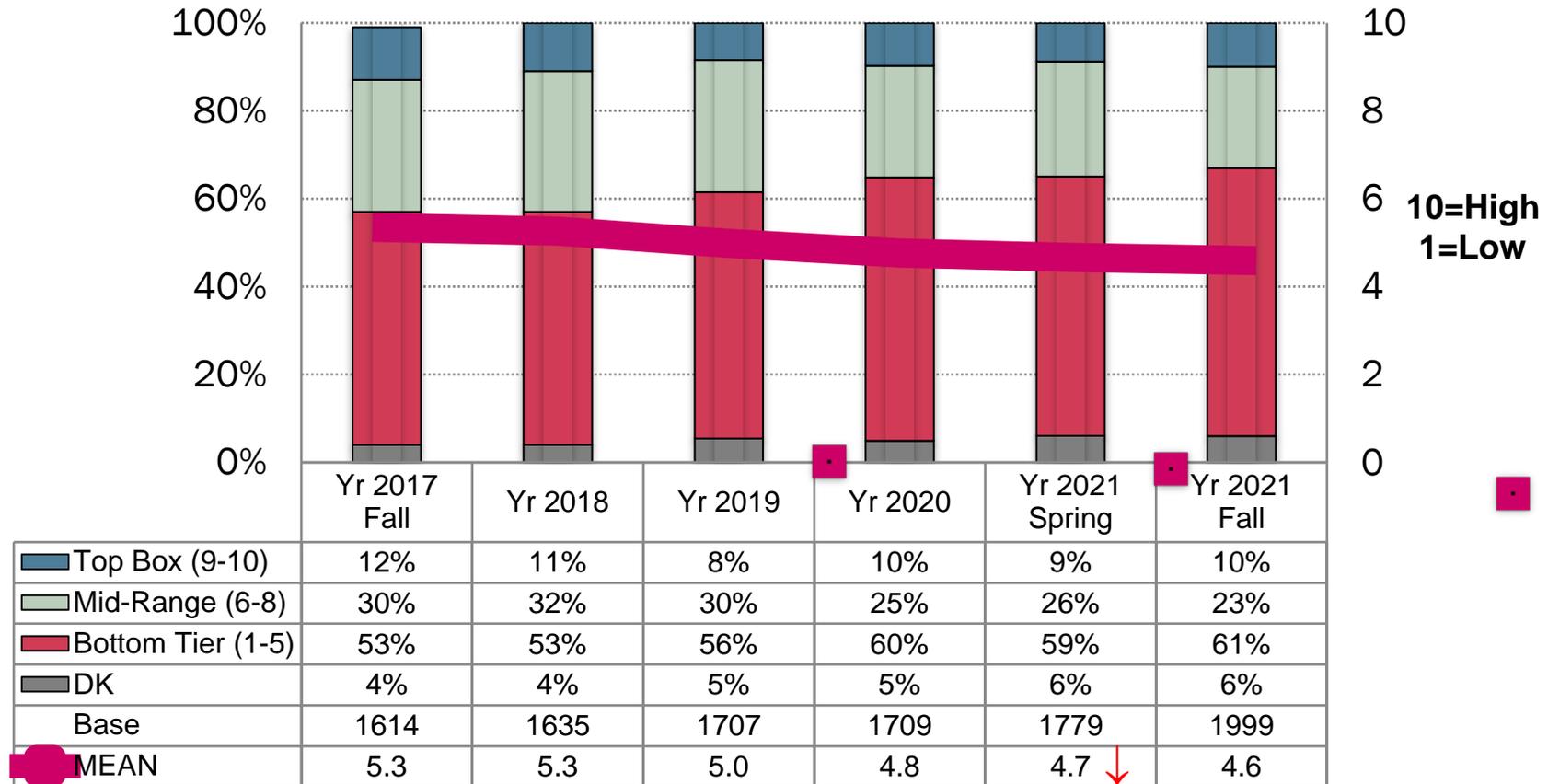
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– *By Demographics*



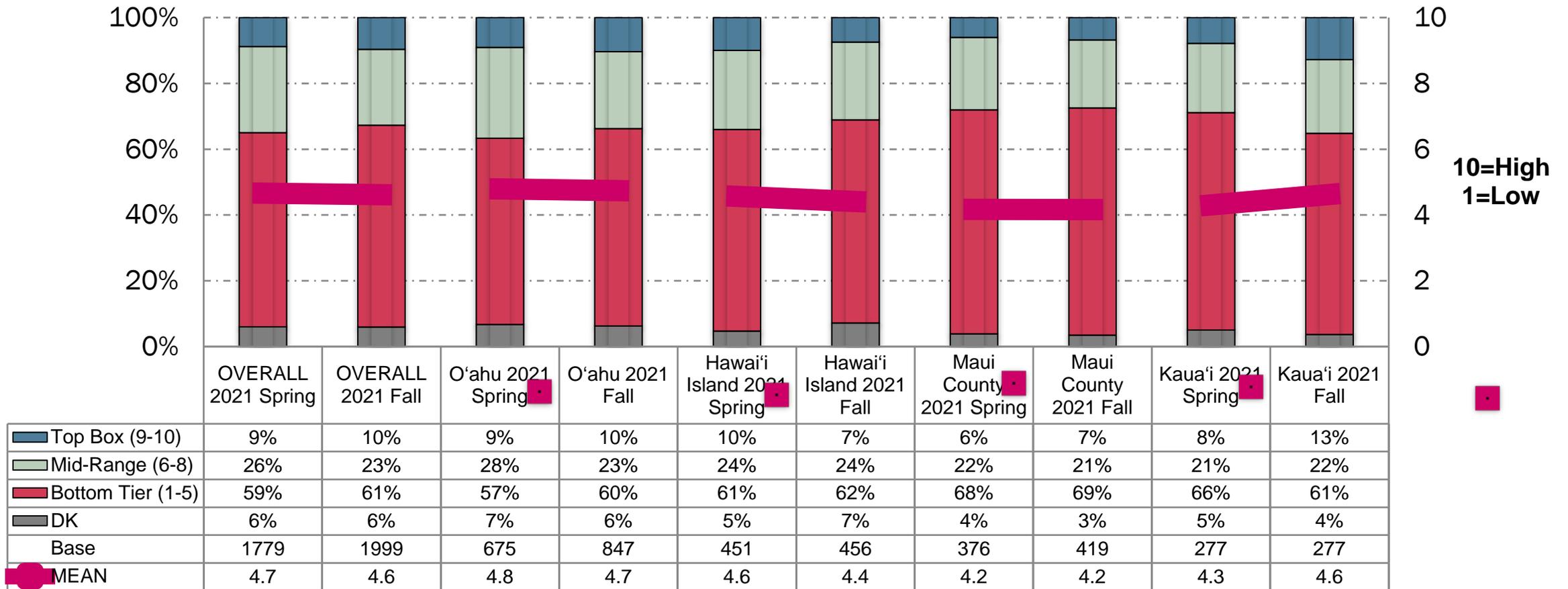
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“Tourism currently presents Native Hawaiian culture in an authentic manner” – Overall



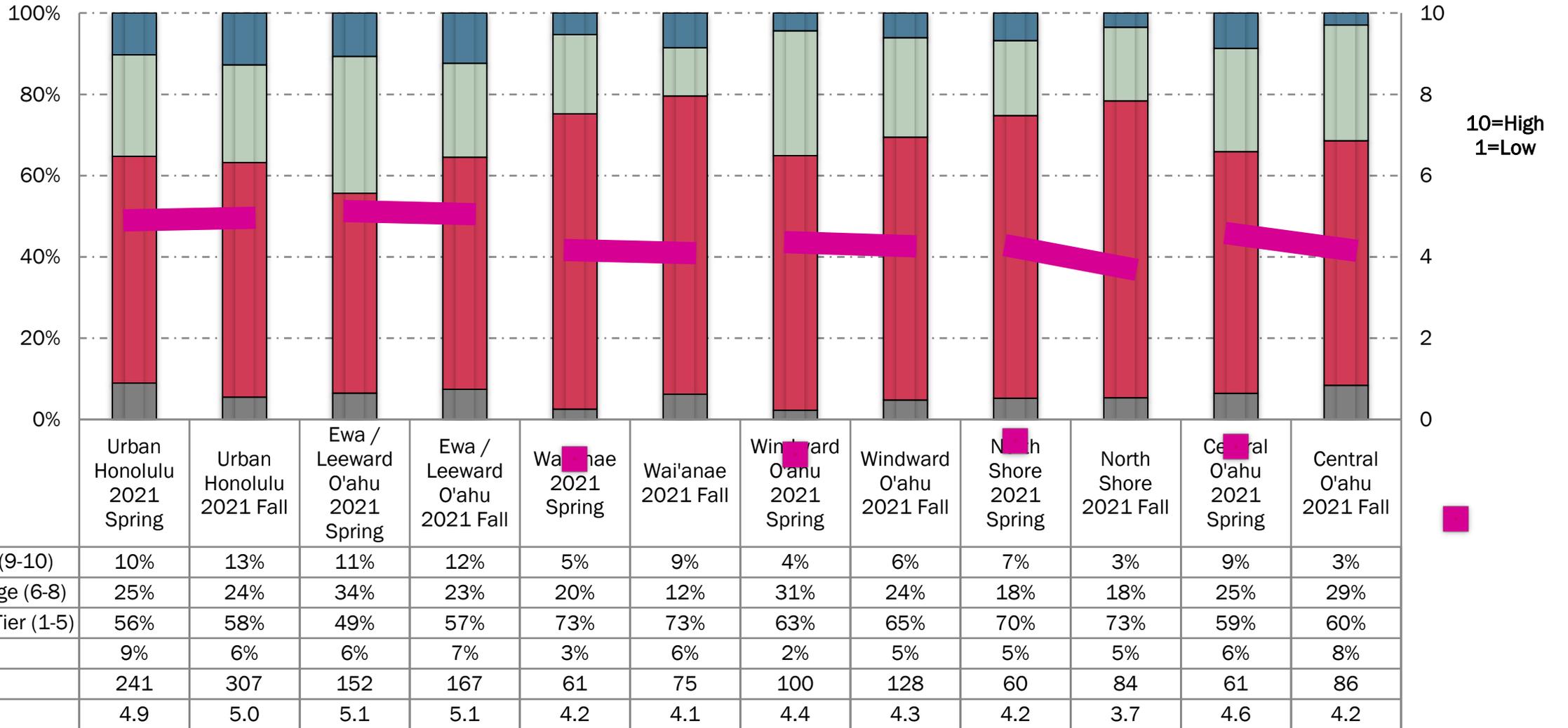
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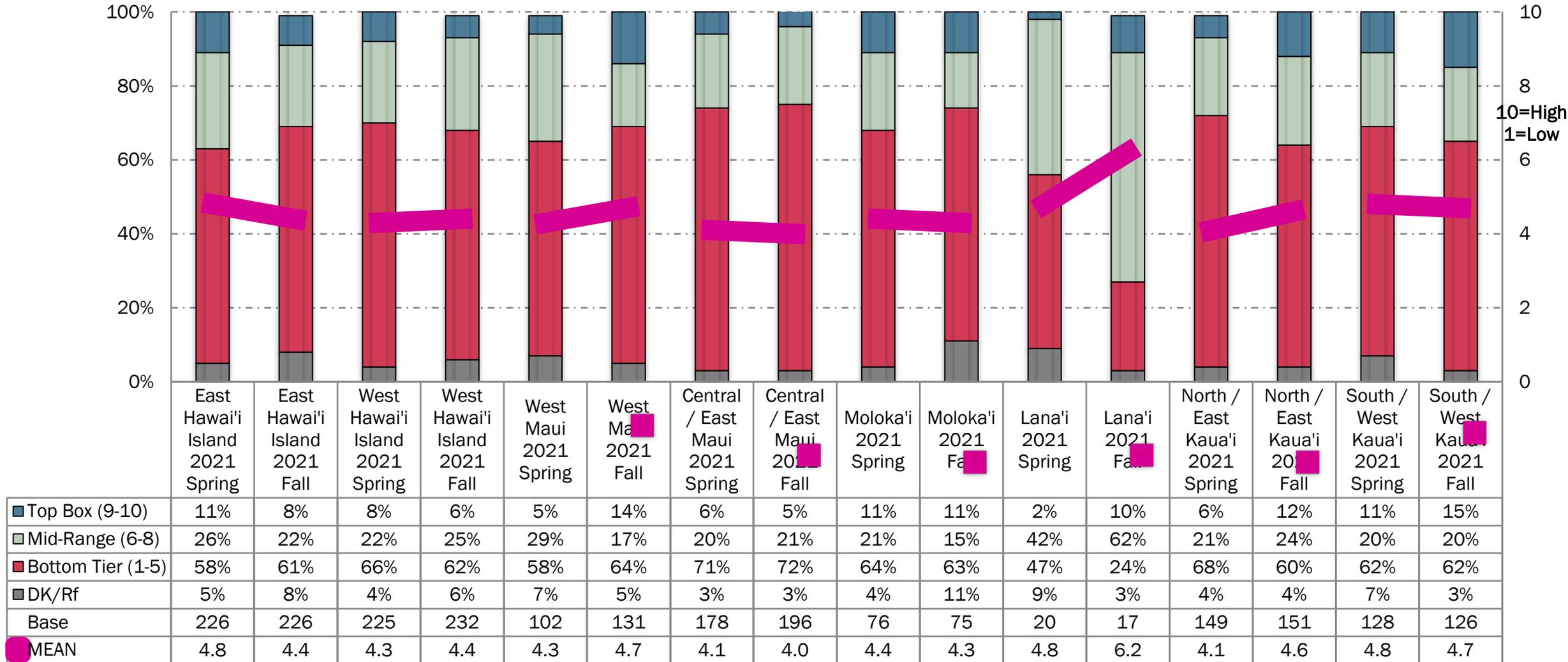
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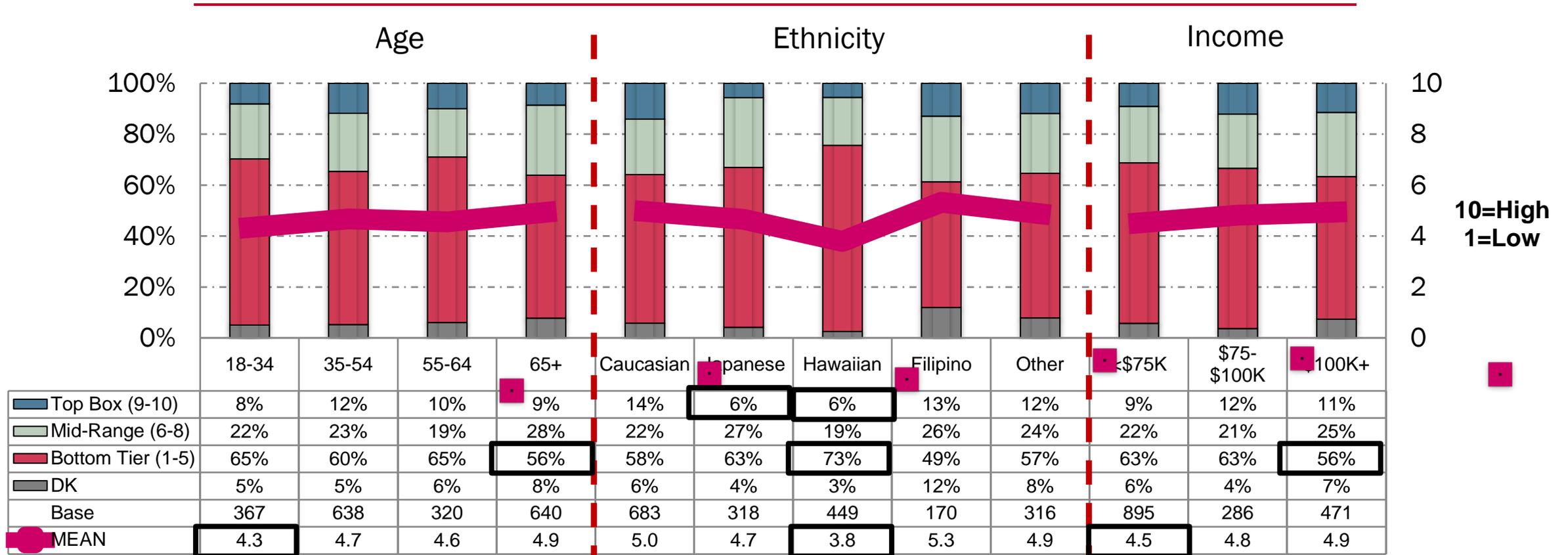
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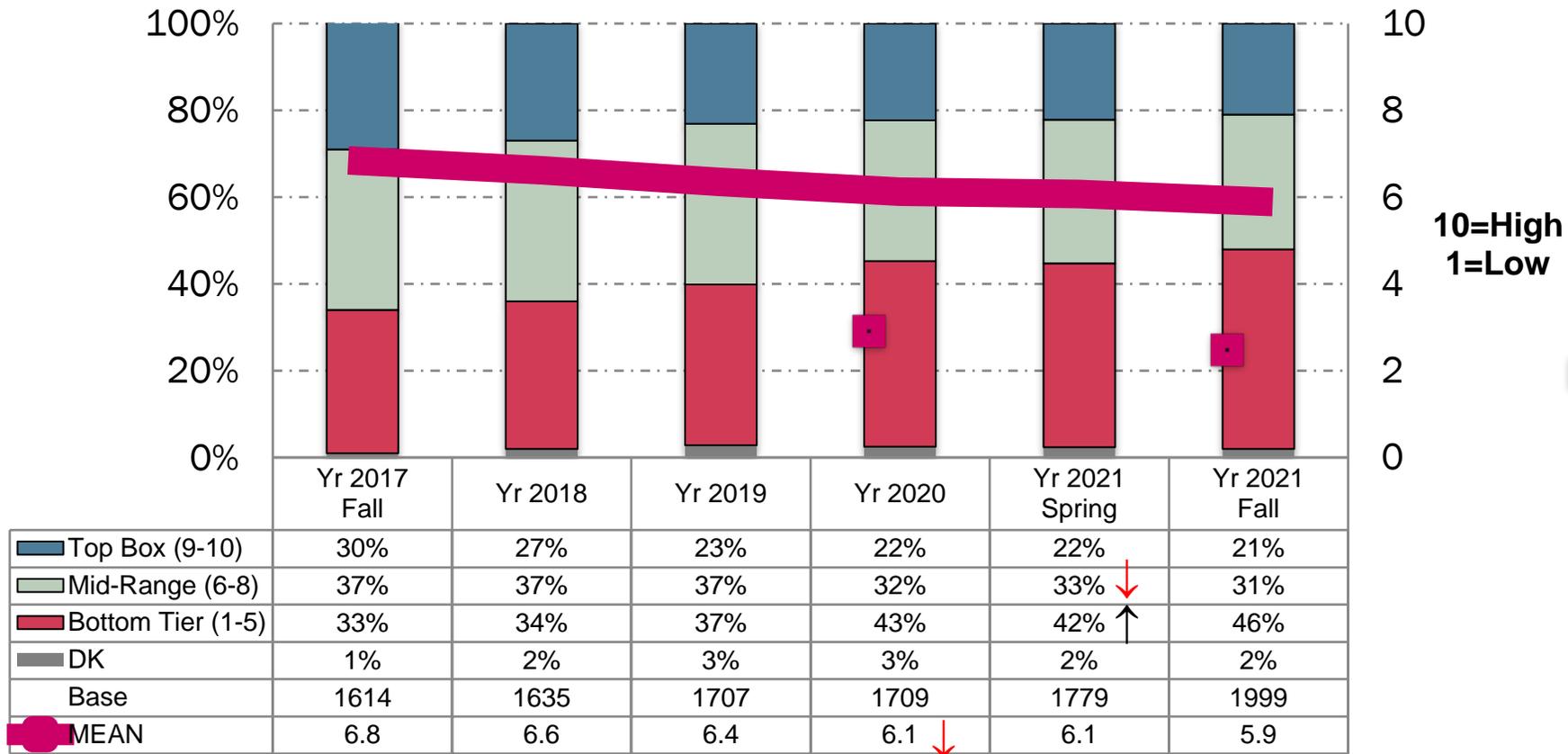
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– *By Demographics*



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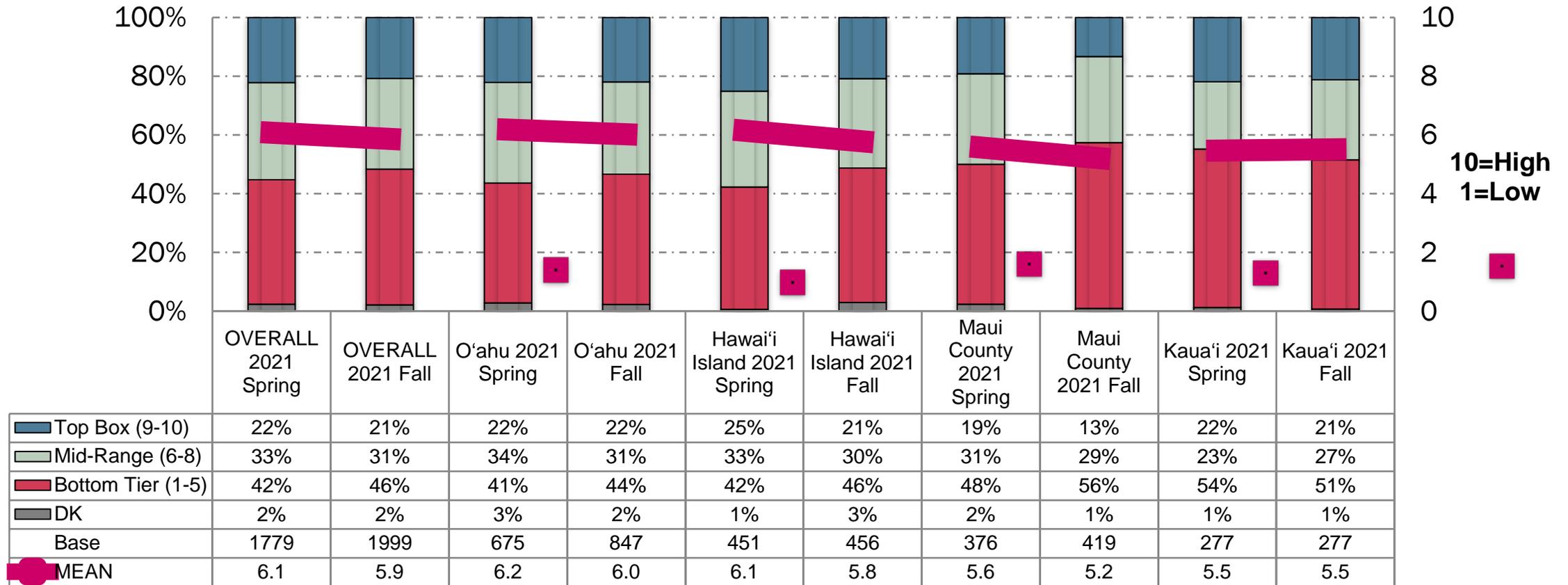
“Tourism should be actively encouraged on my island - Overall



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...?

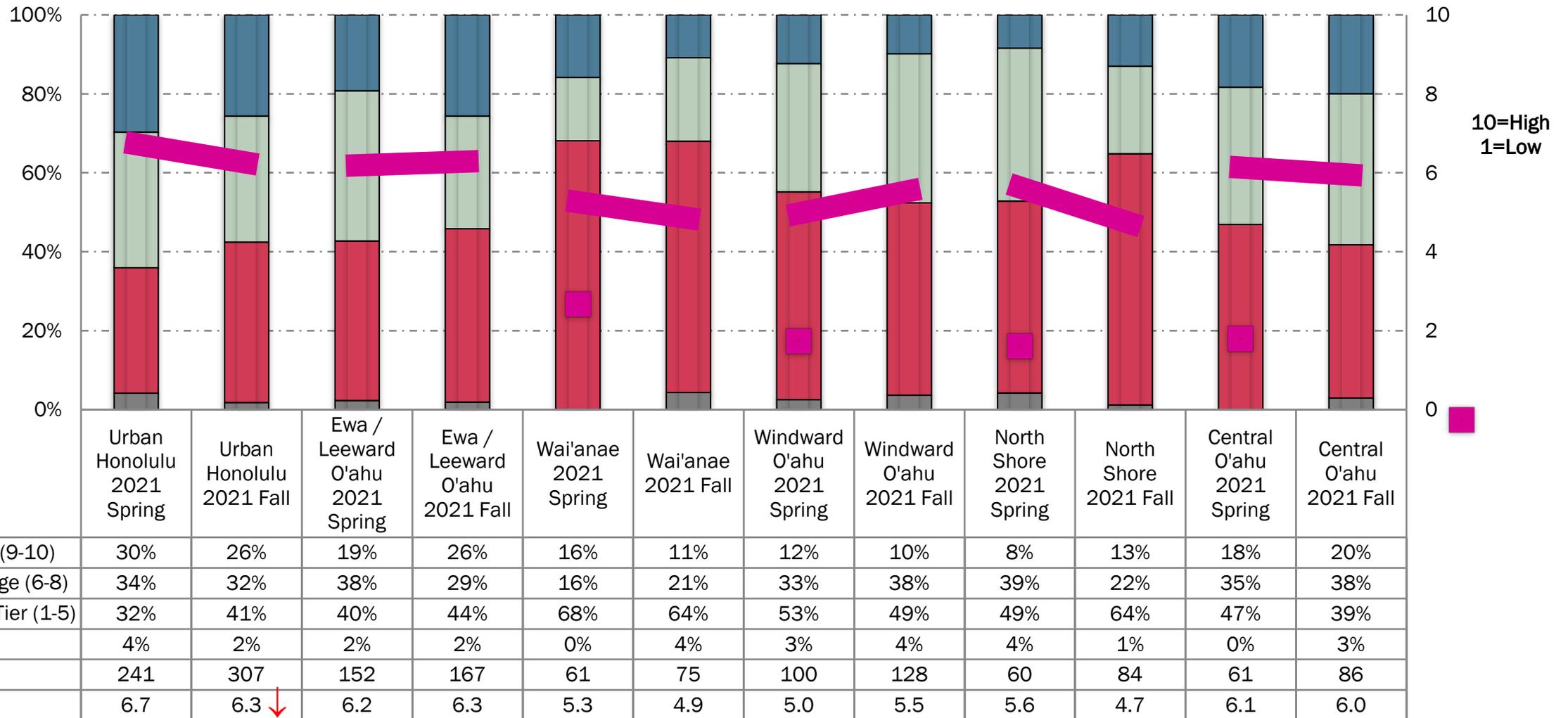
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– *By Island*



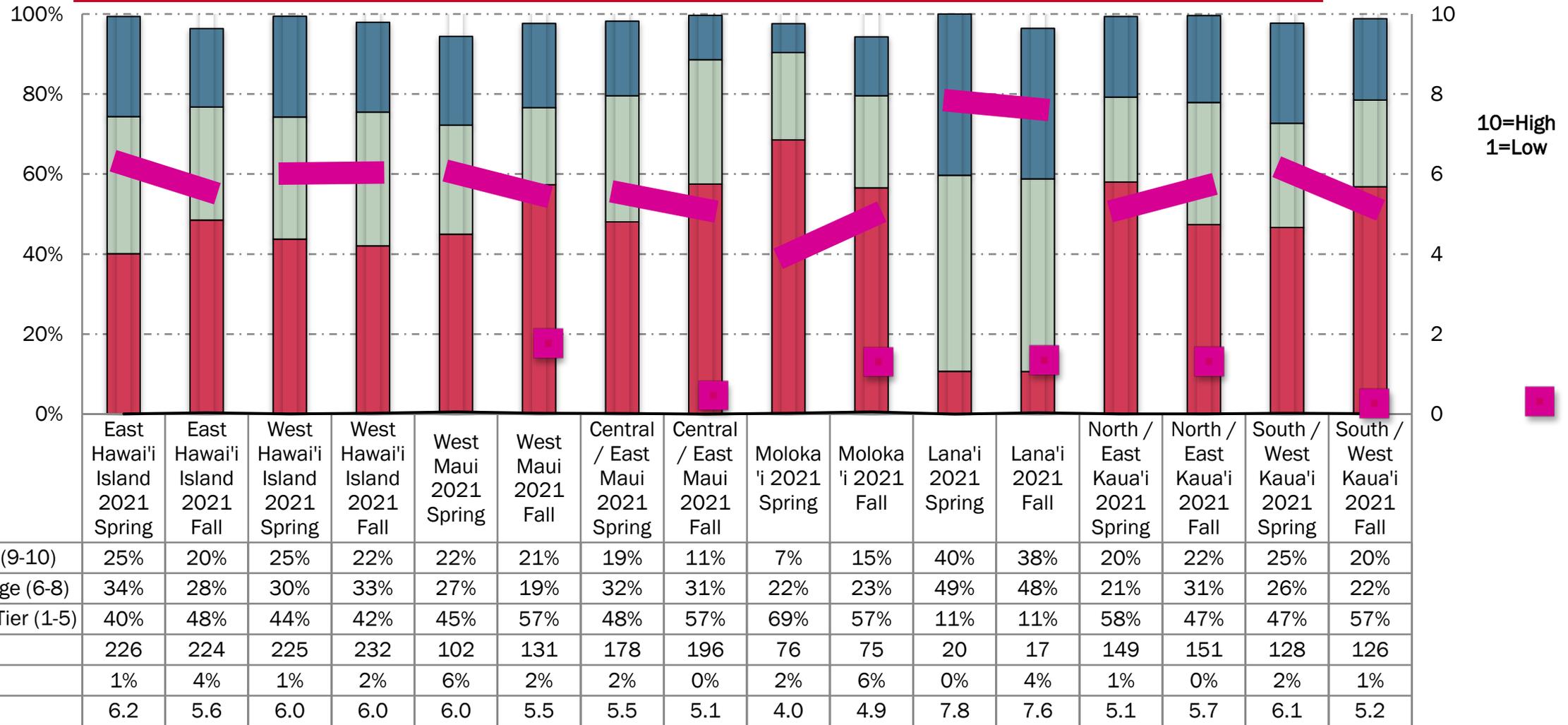
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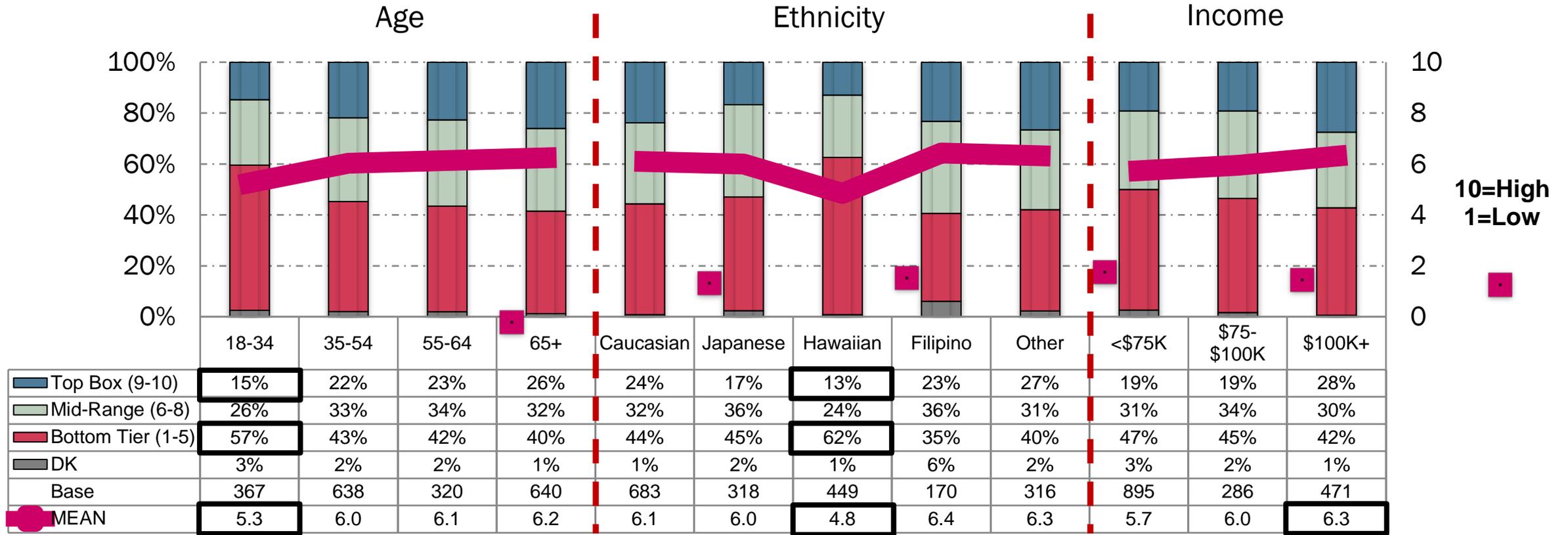
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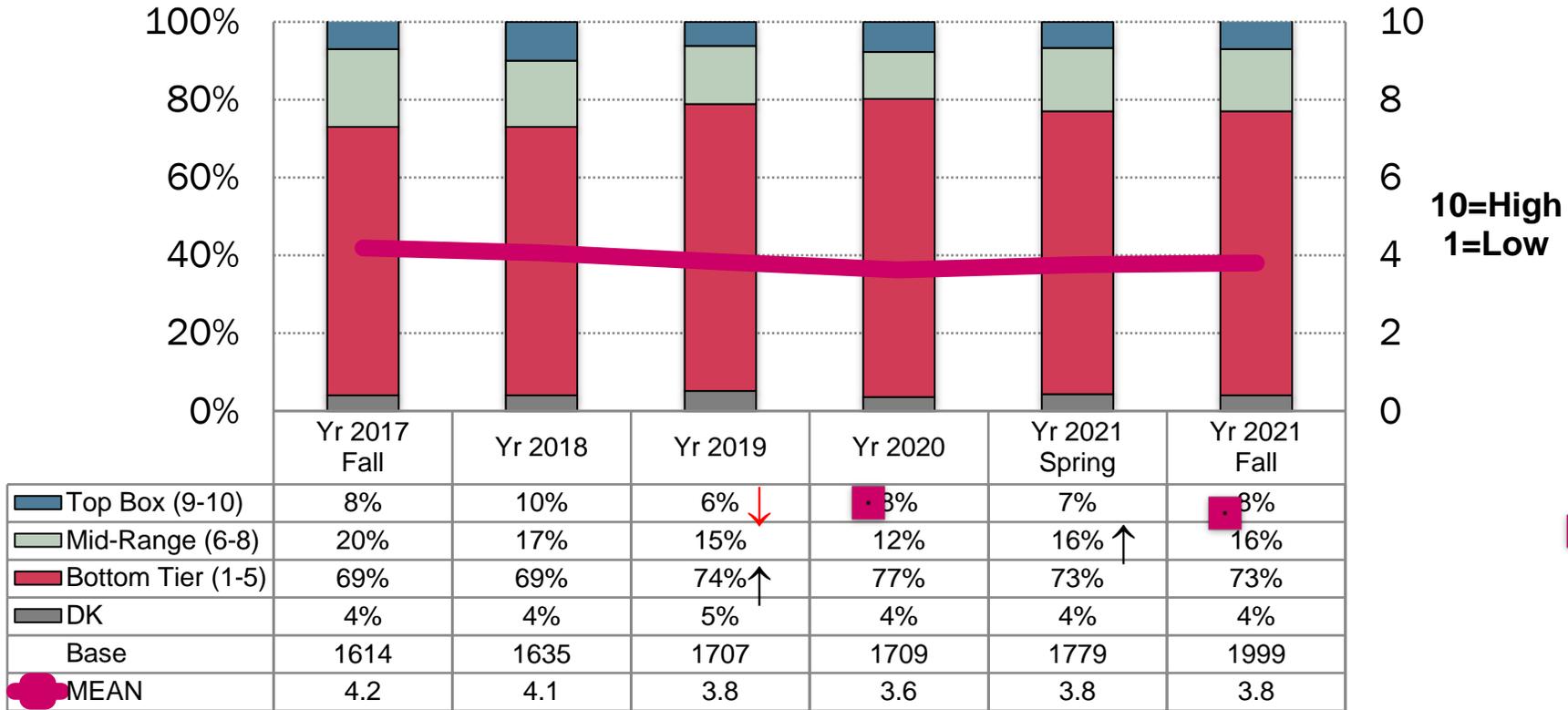
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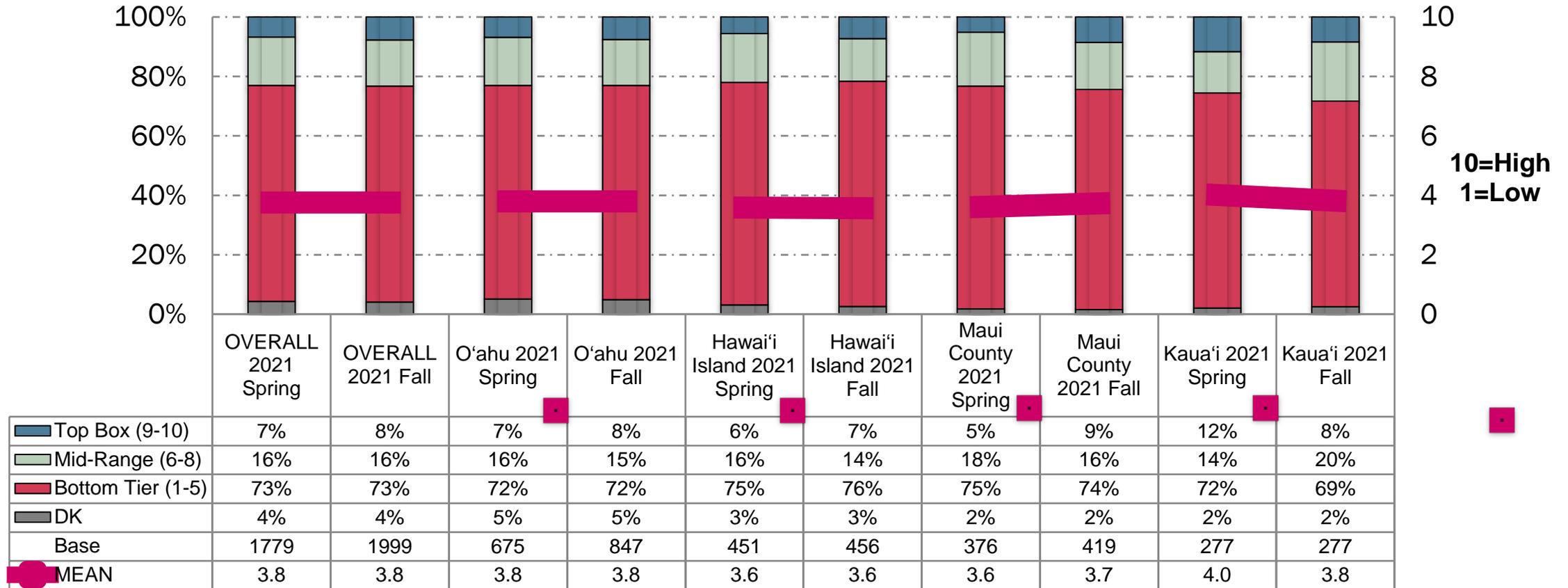
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“I feel like I have a voice in my island’s tourism development decisions” - *Overall*



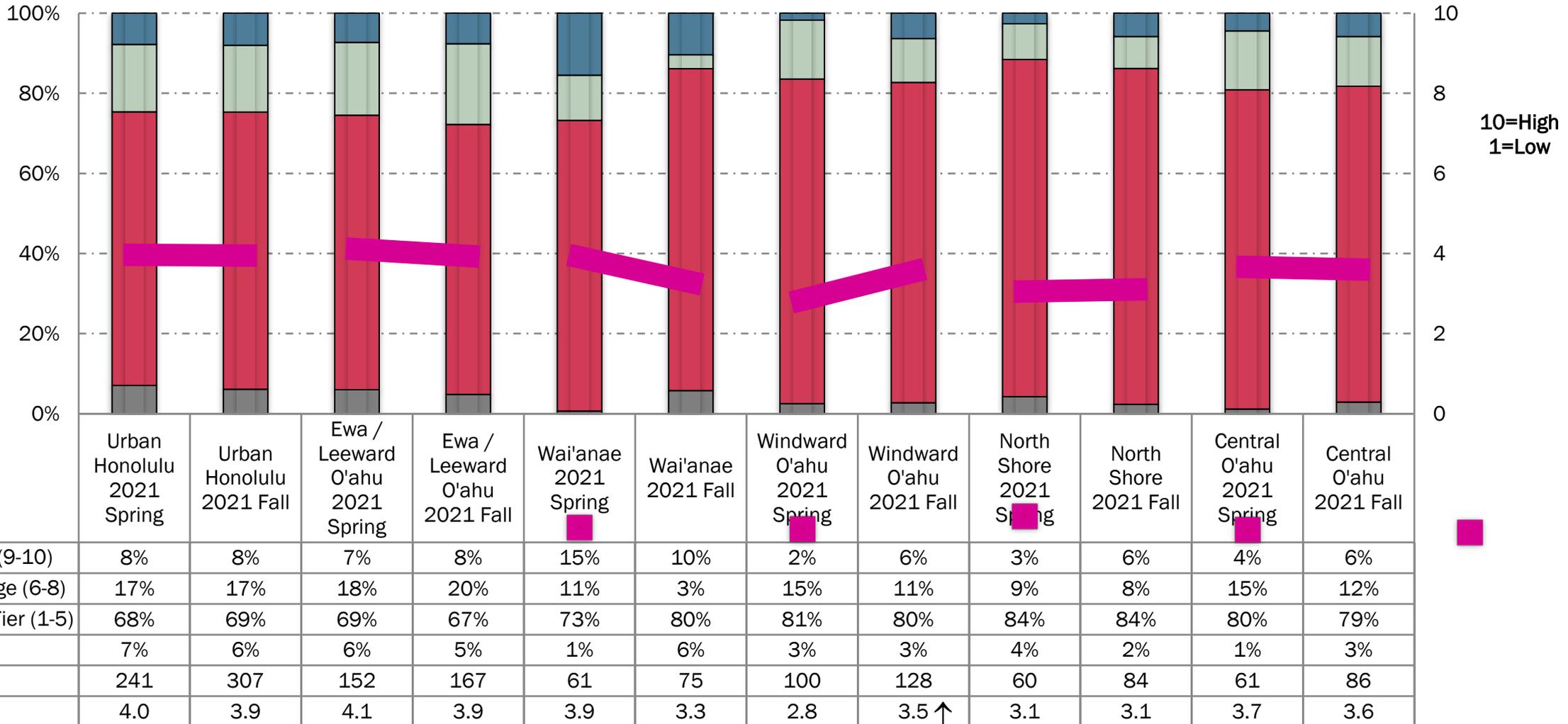
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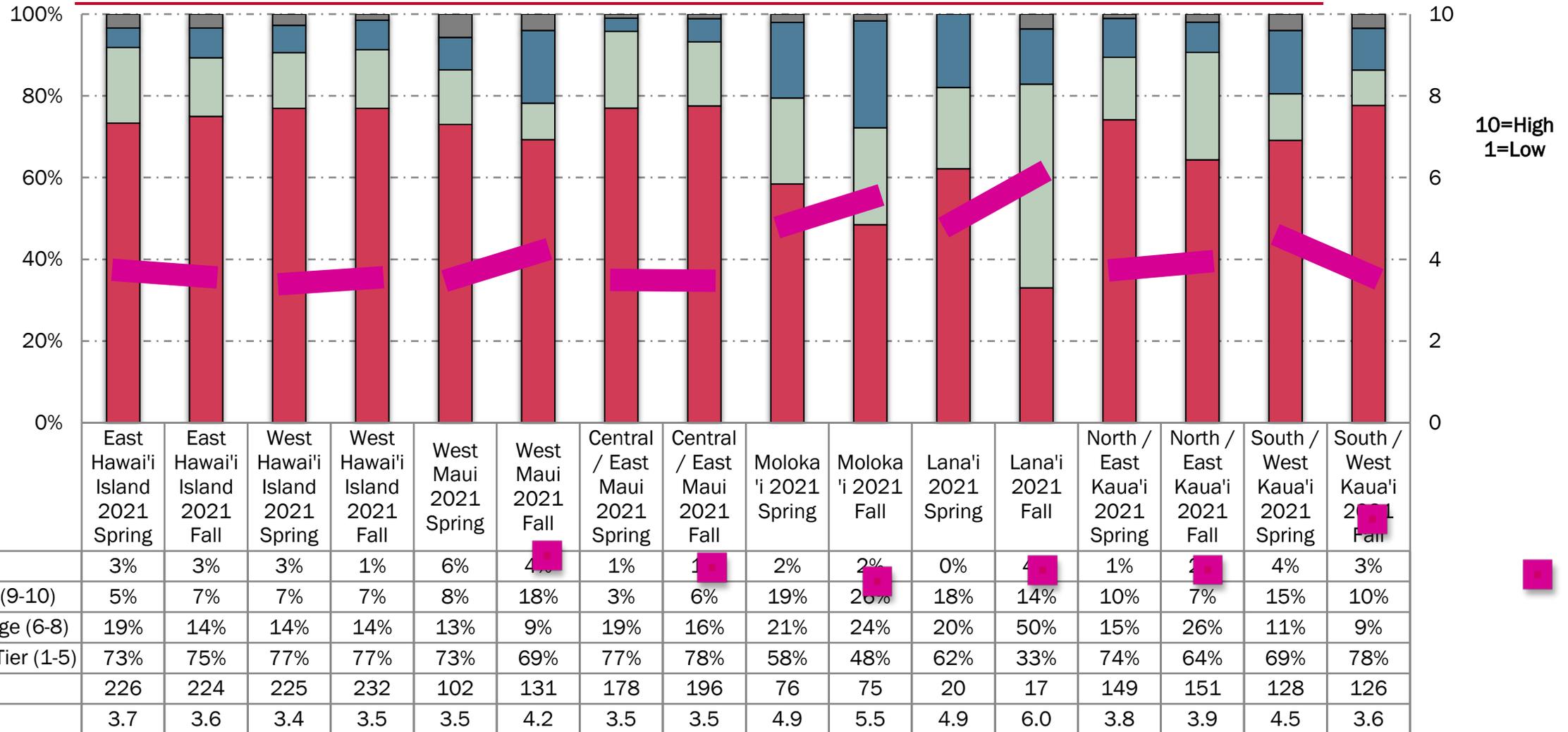
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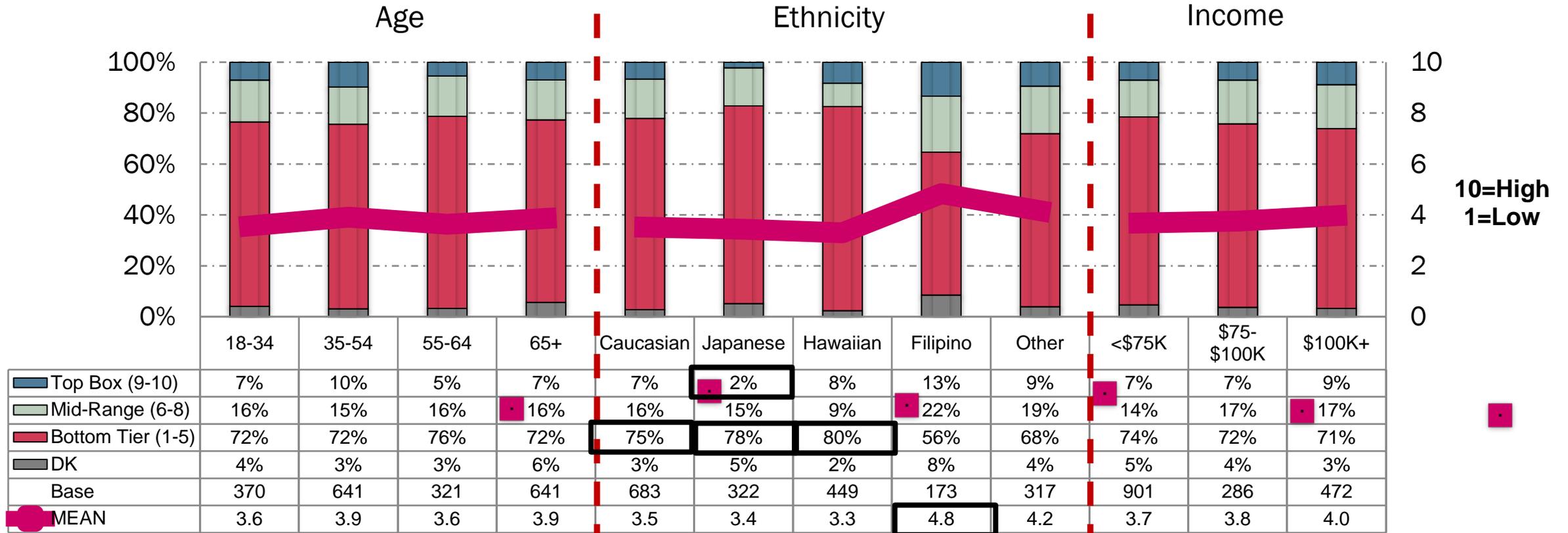
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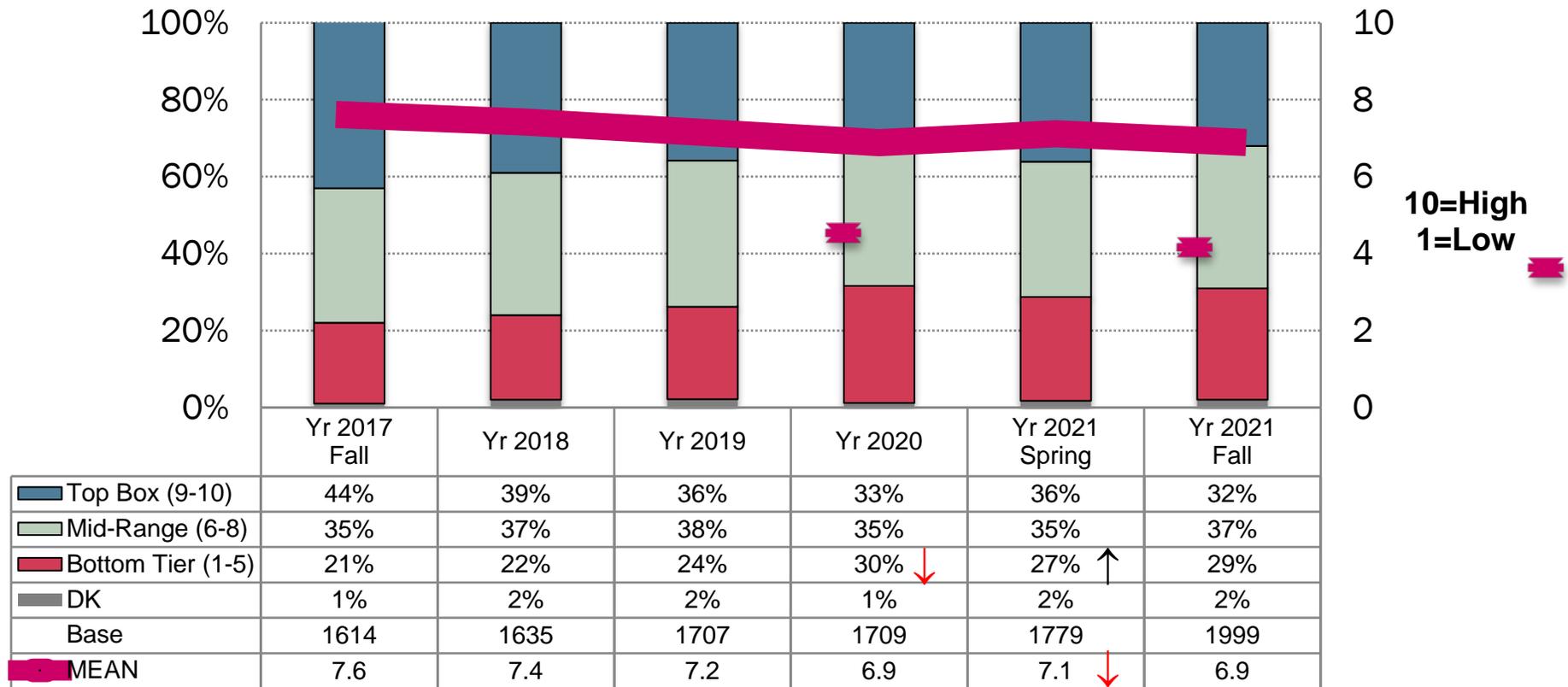
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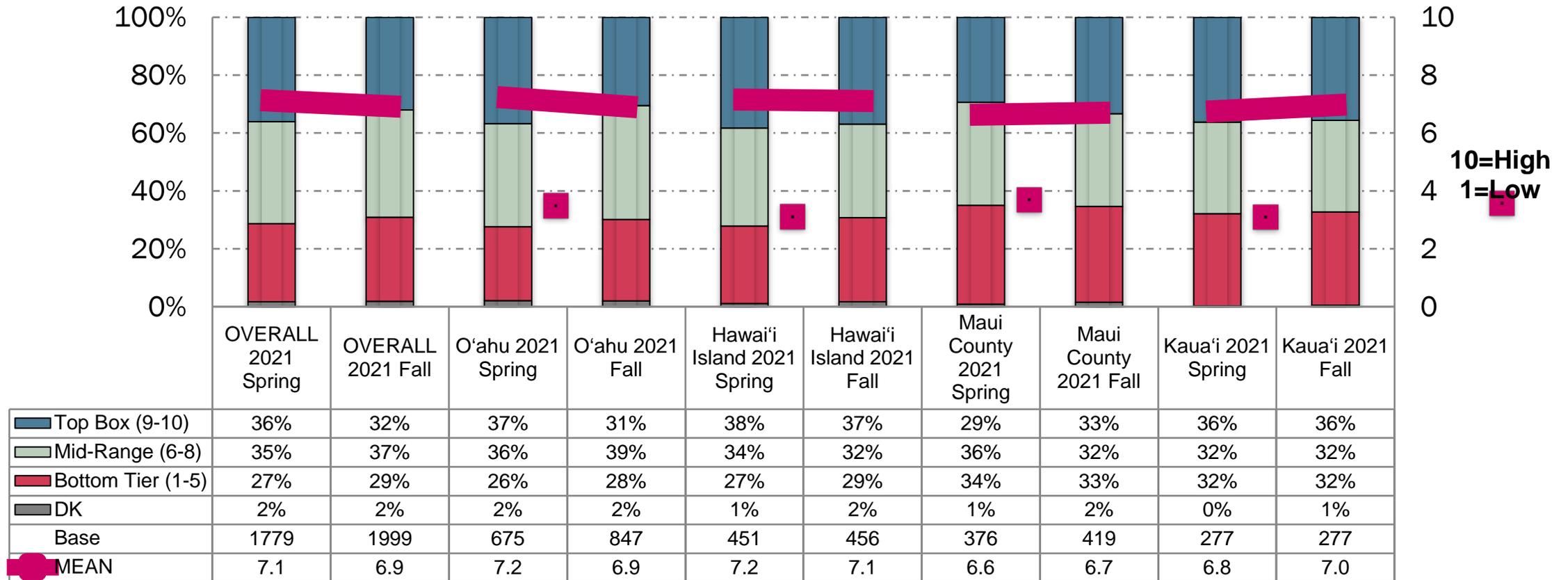
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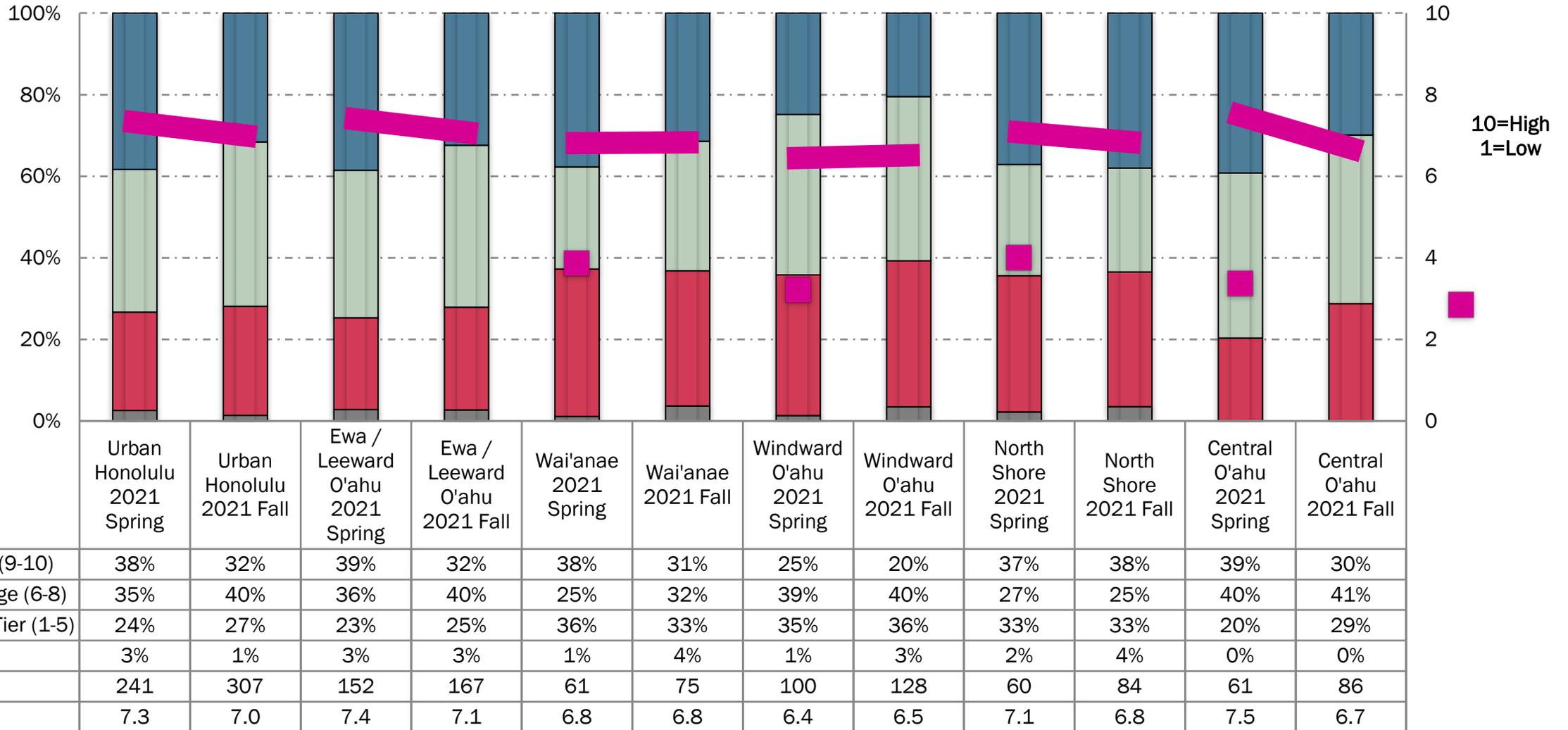
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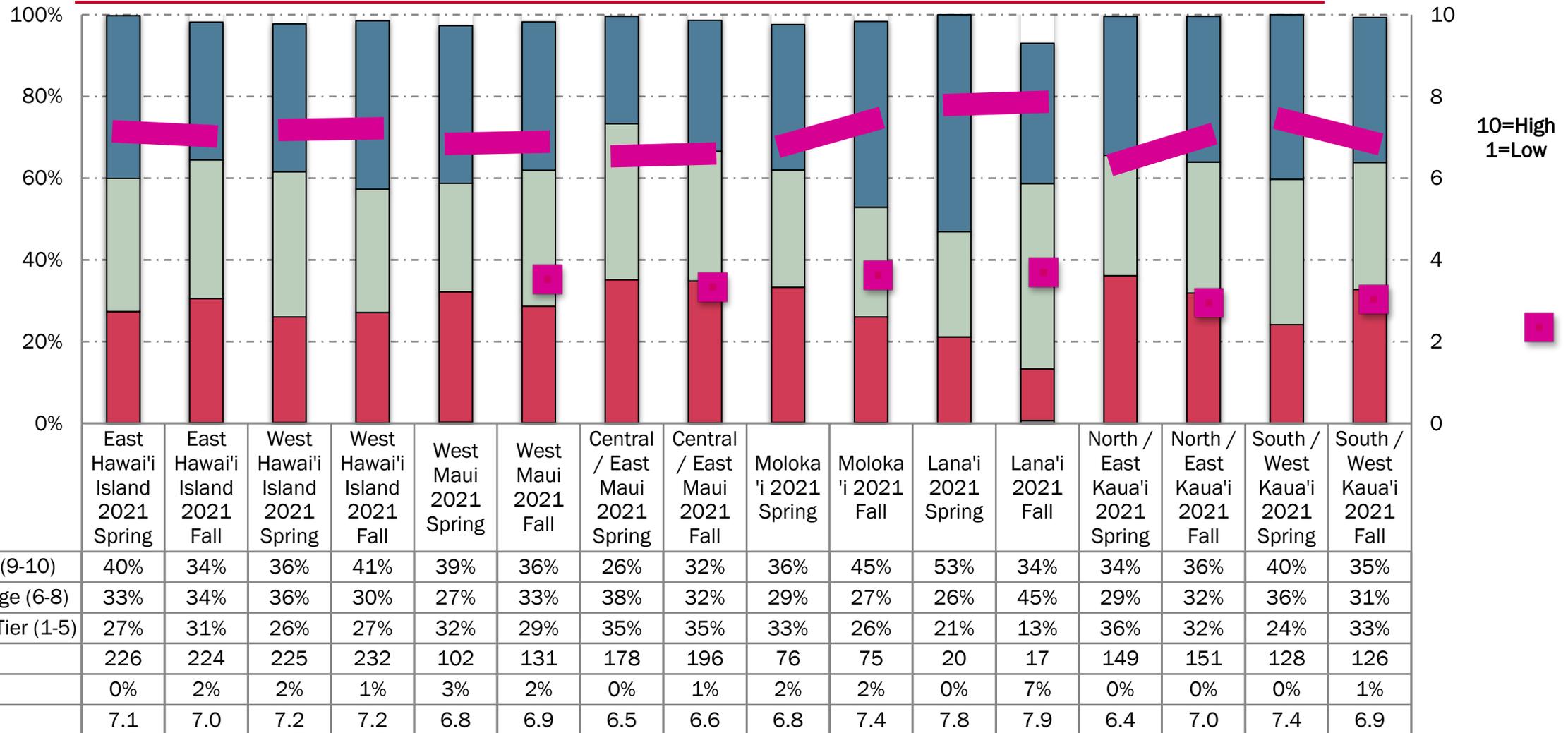
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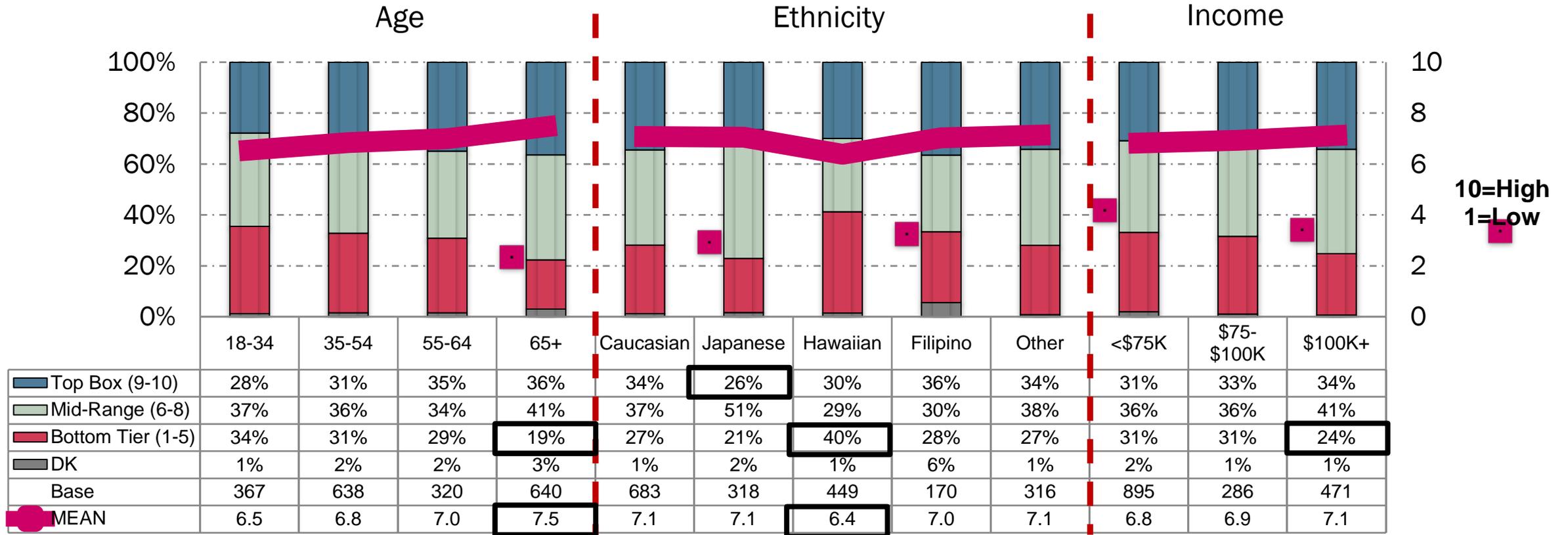
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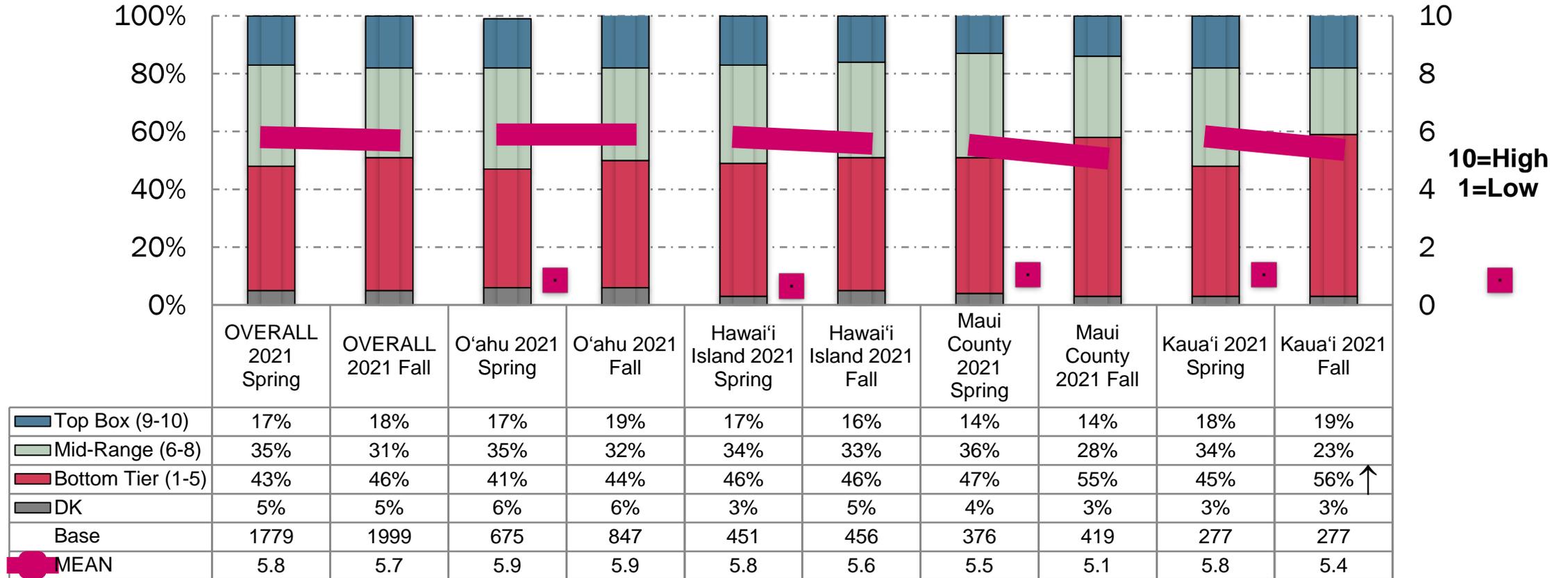
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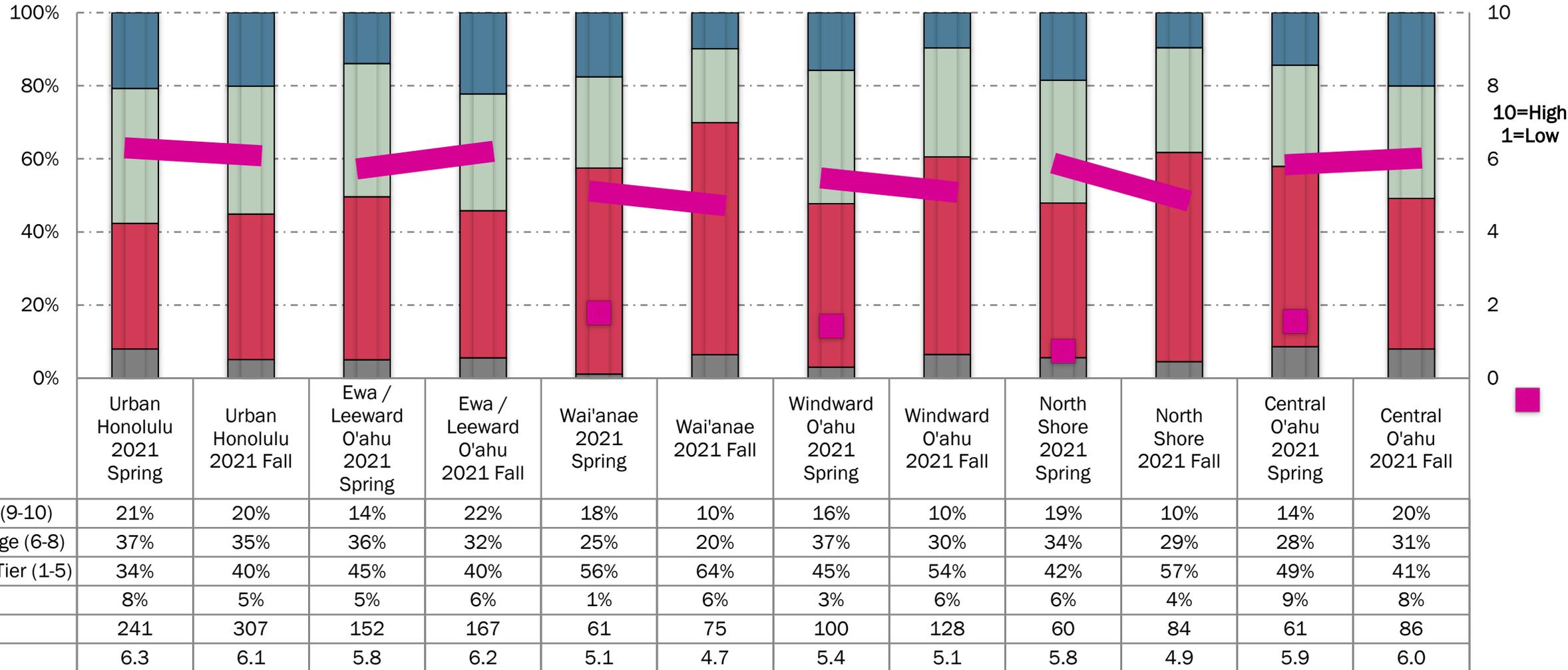
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“Tourism supports other industries like agriculture” – *By Island*



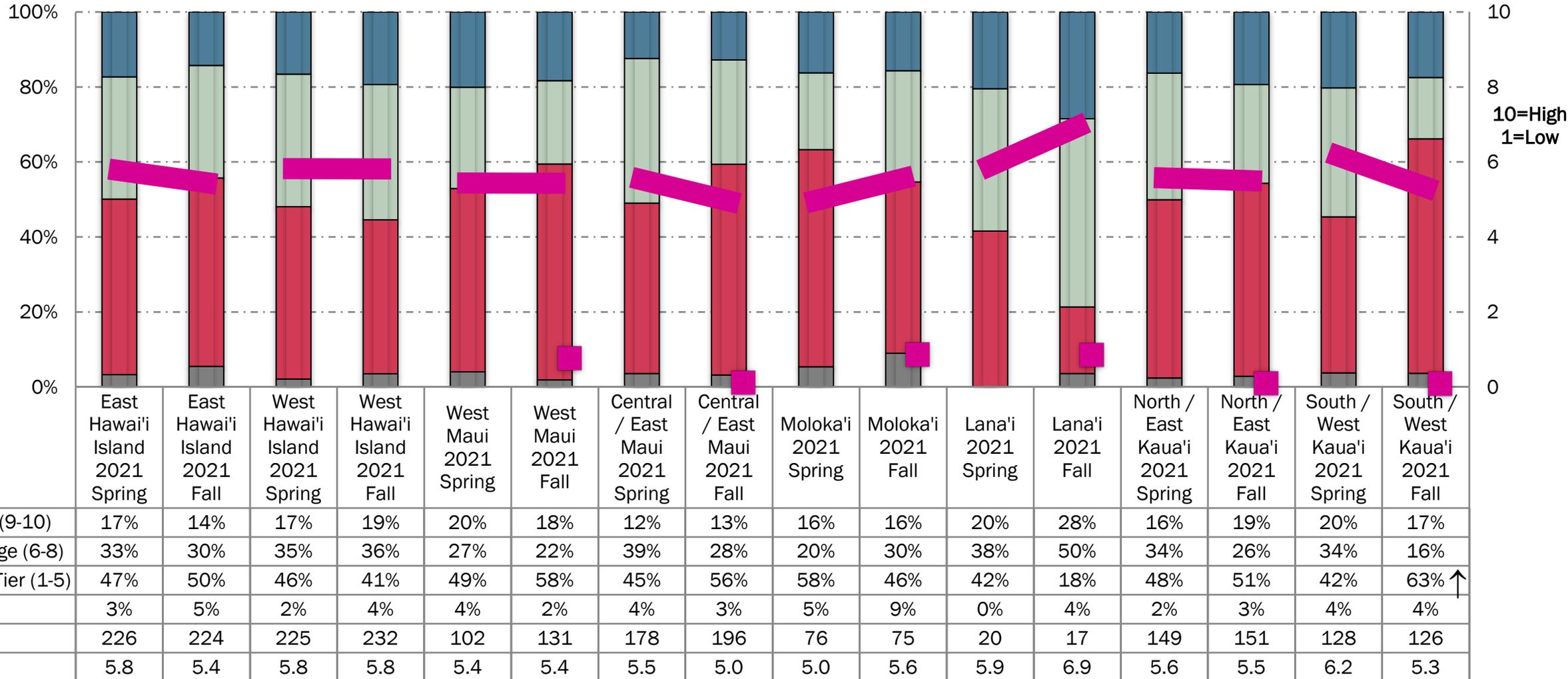
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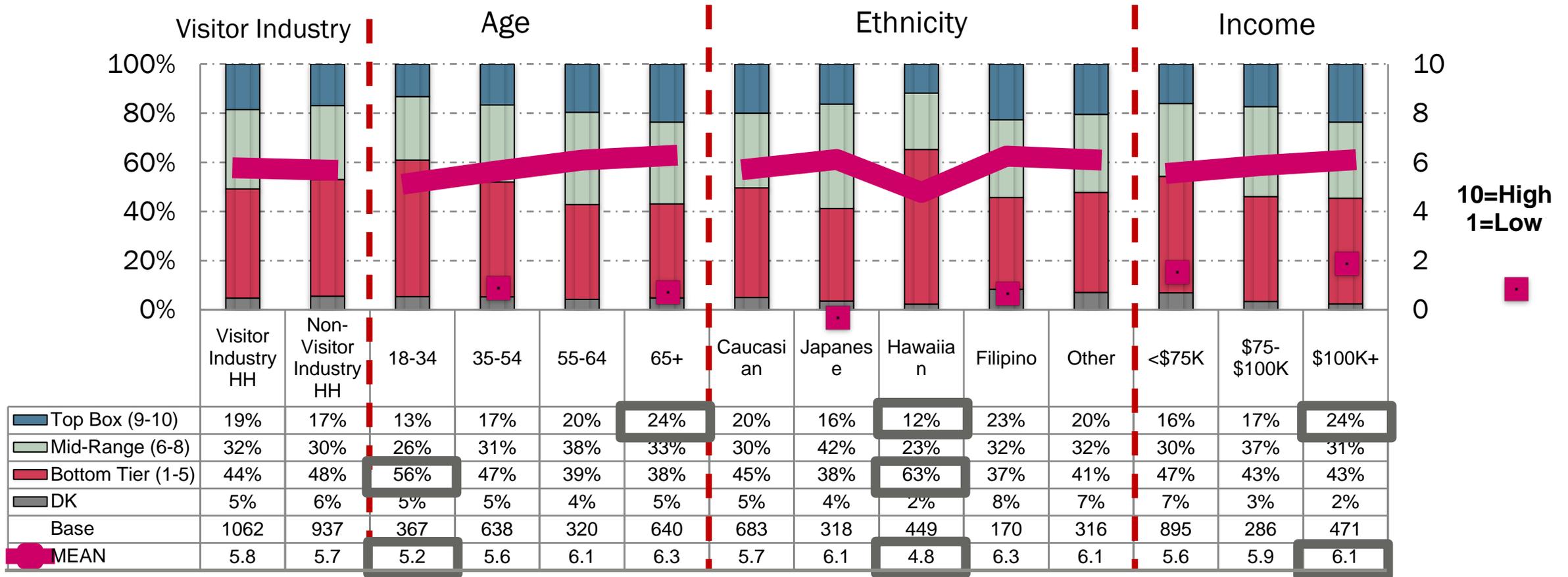
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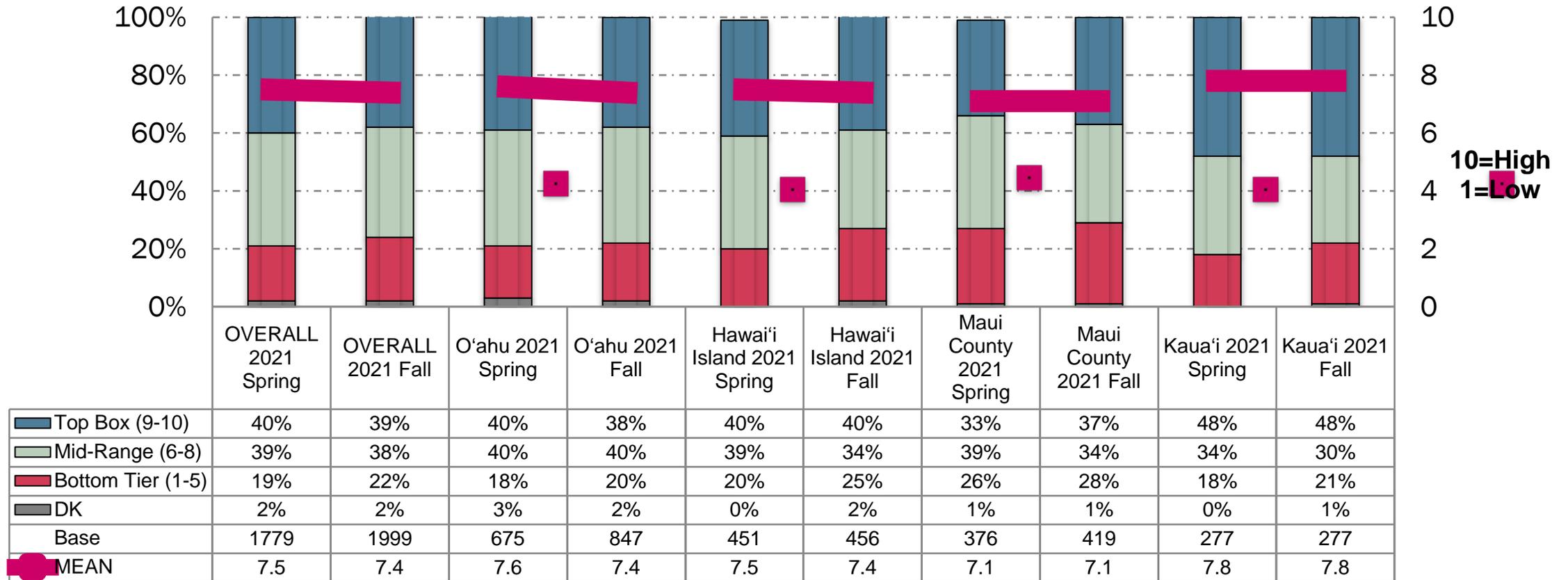
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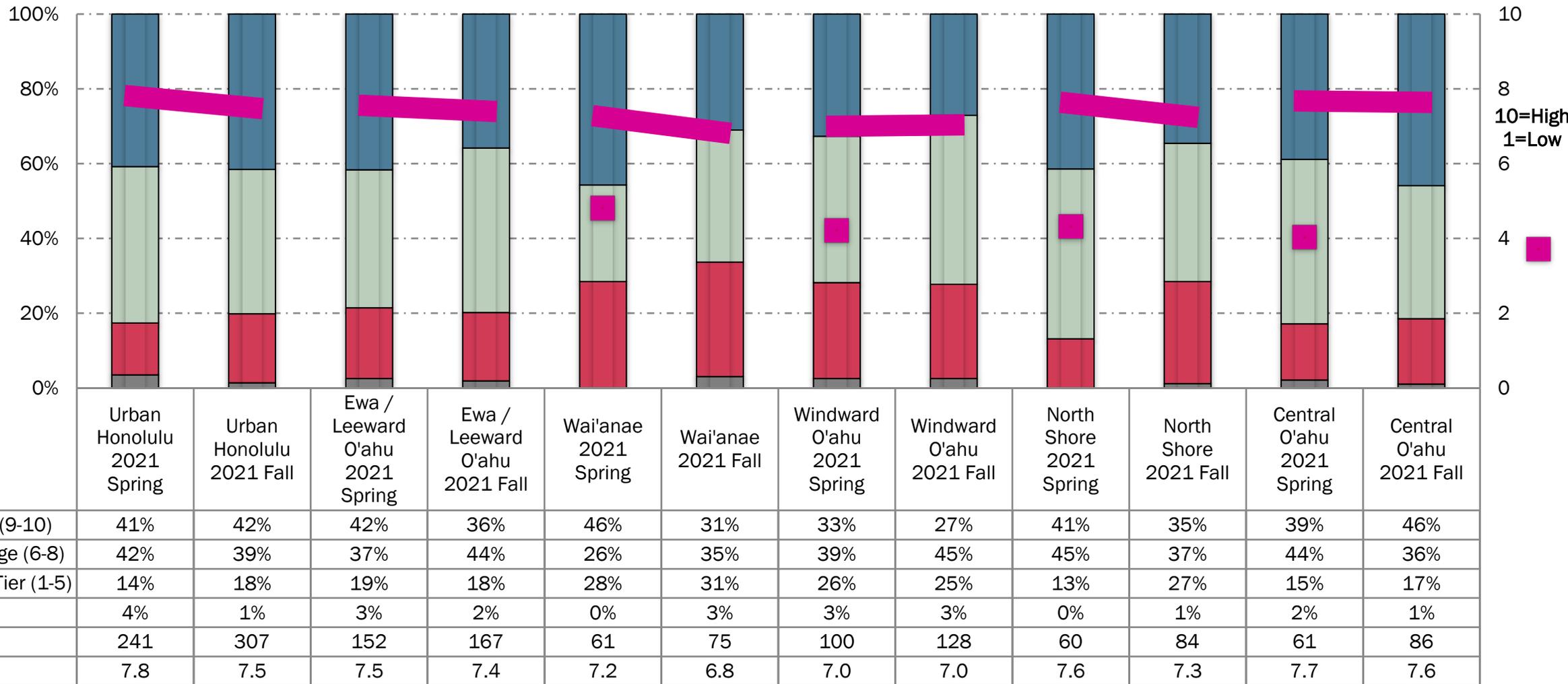
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“Tourism supports our local businesses like retail, dining, etc.” – *By Island*



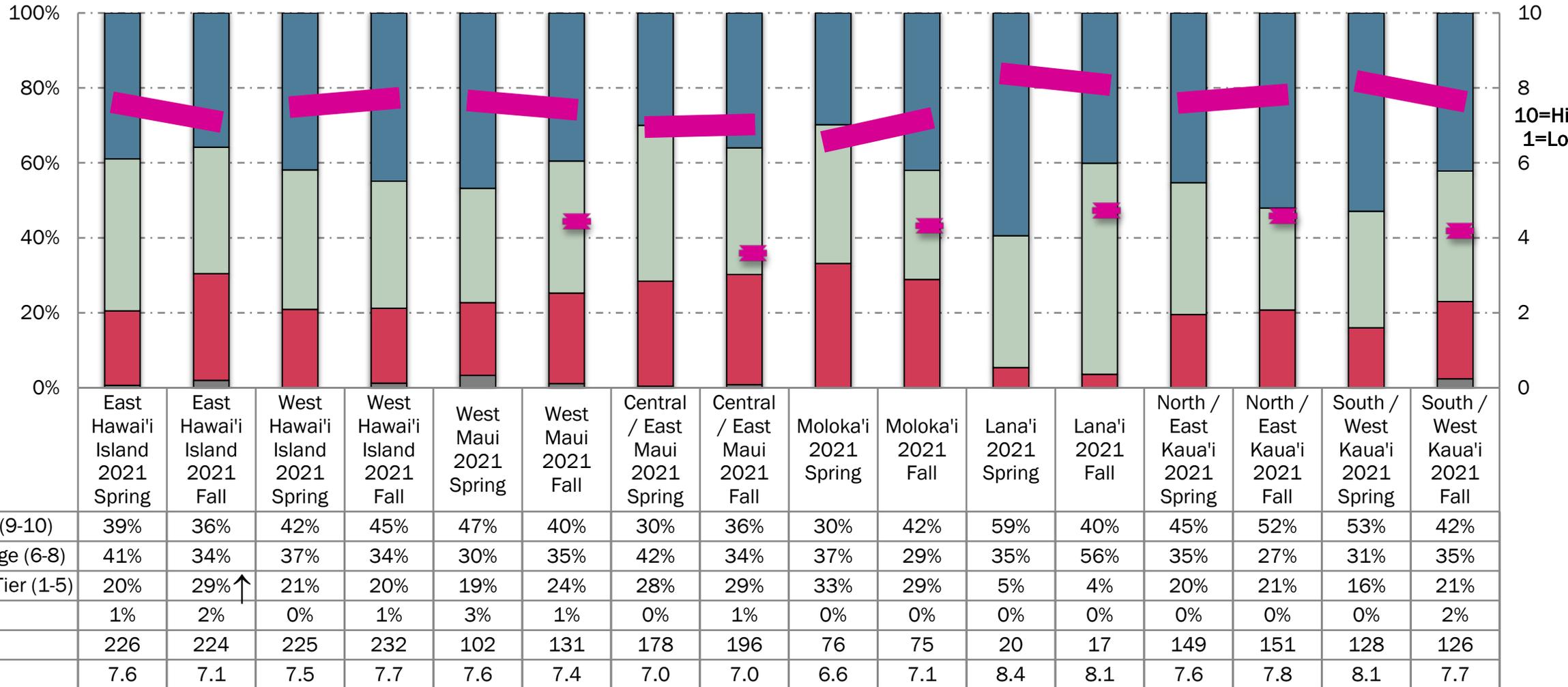
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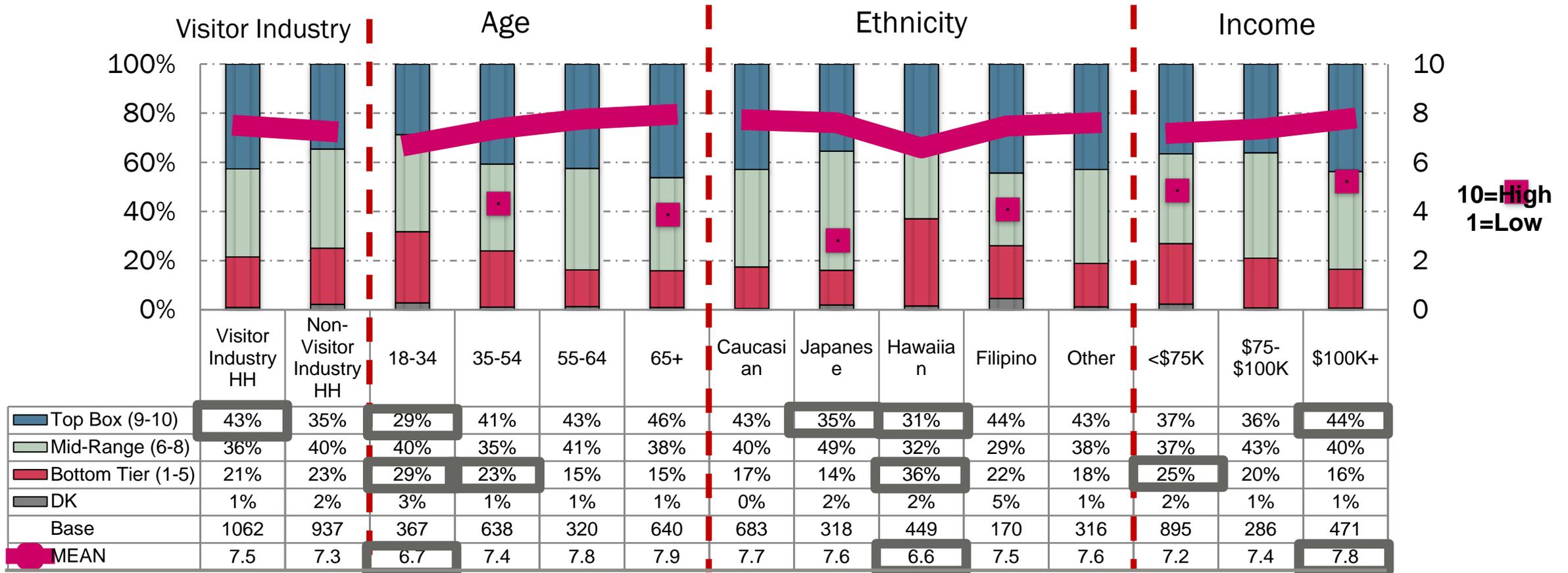
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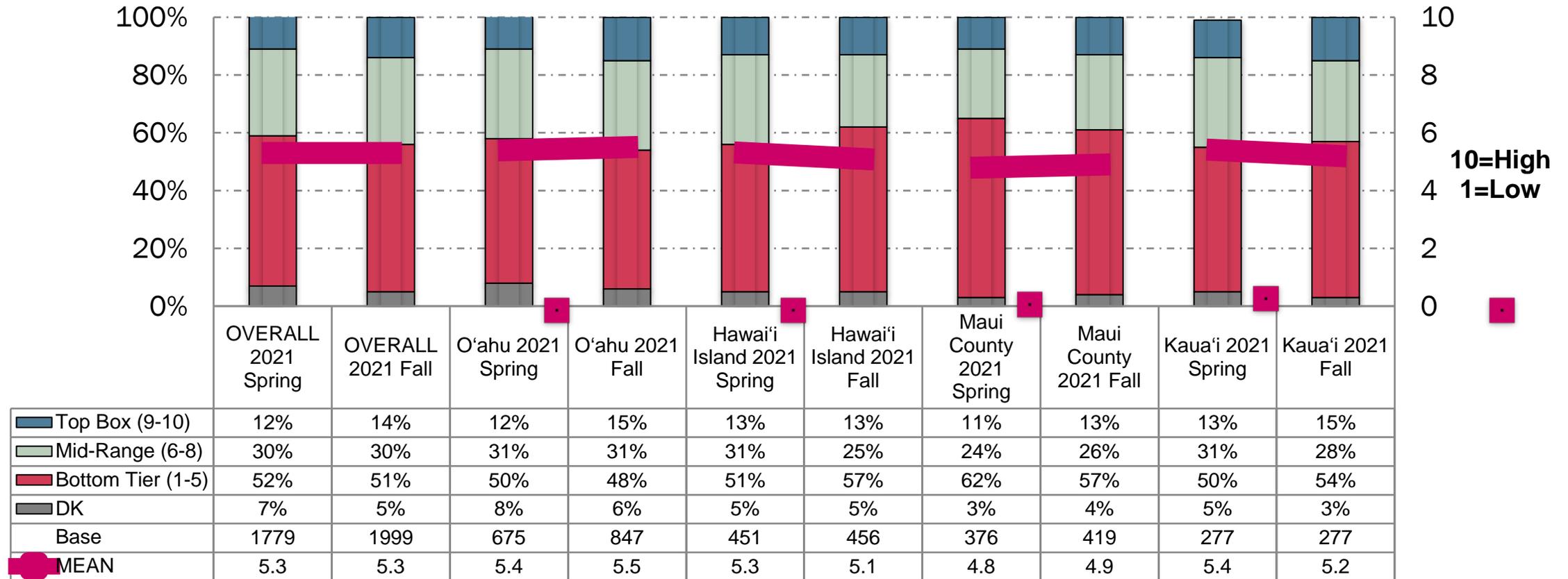
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By Island*



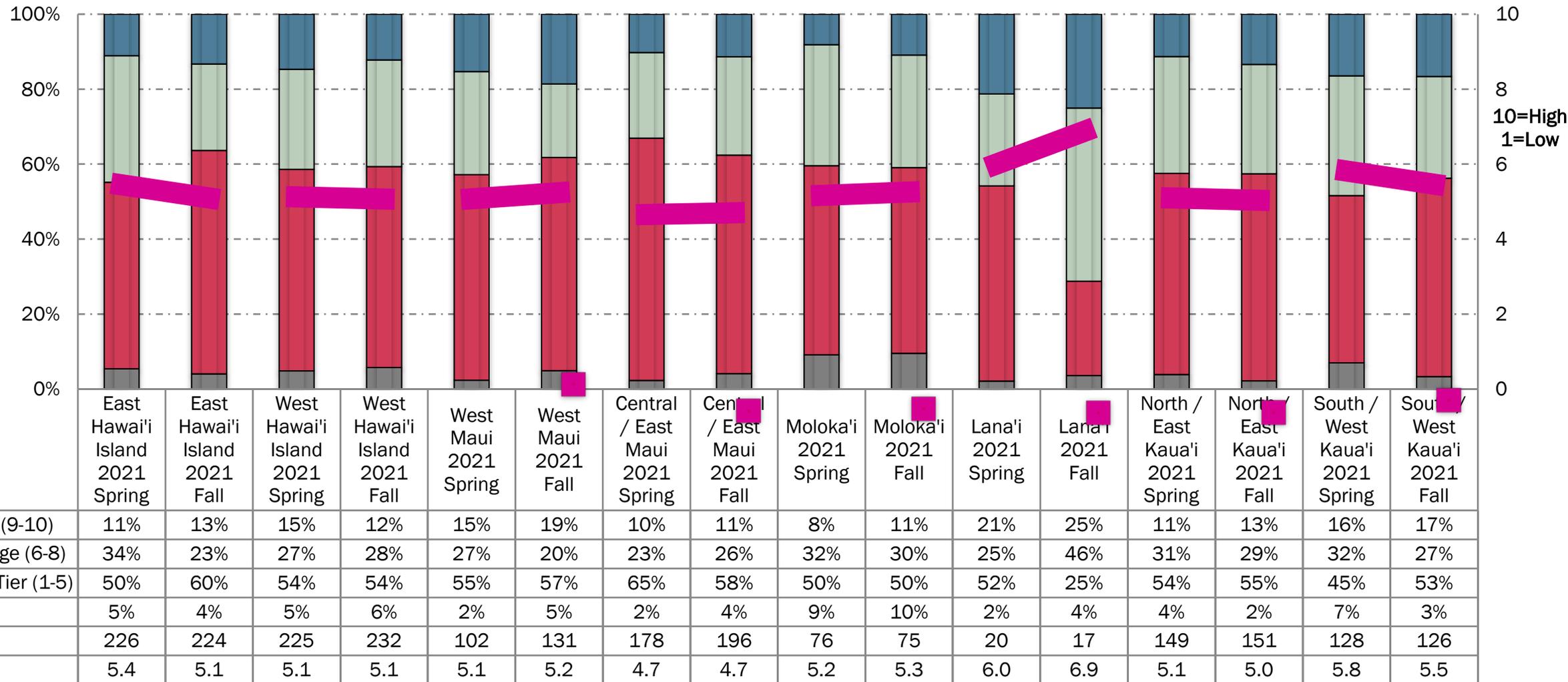
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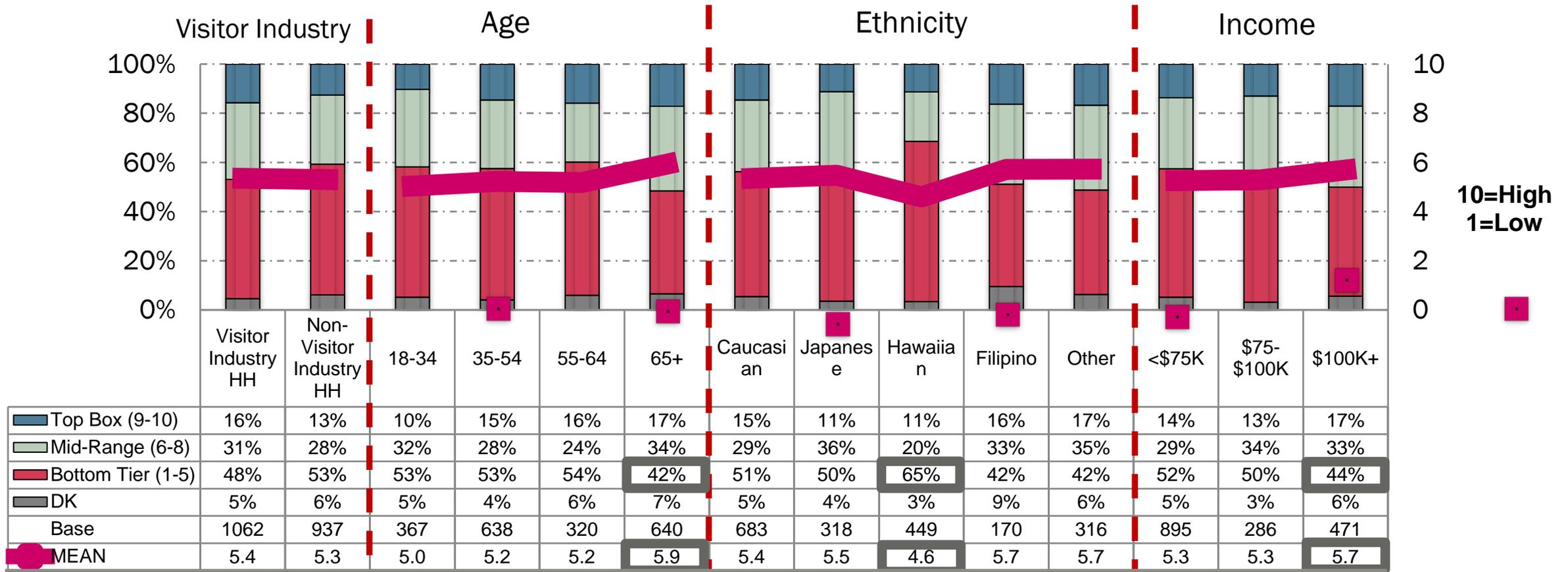
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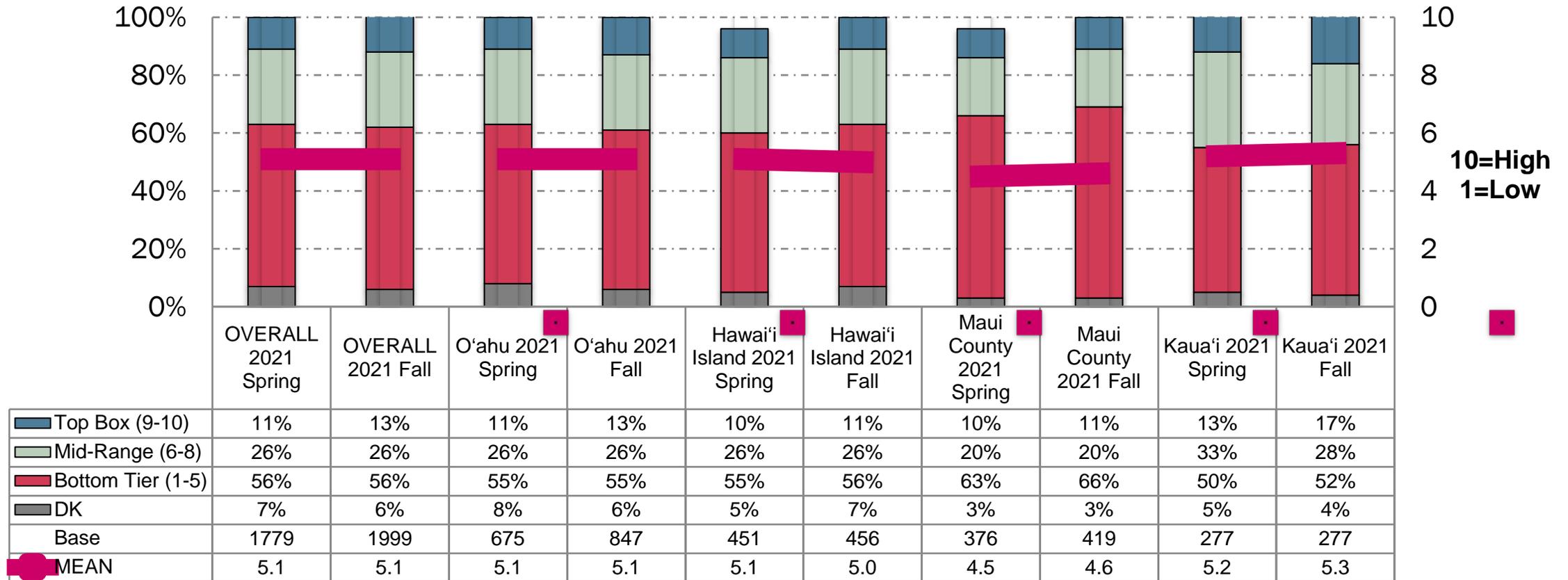
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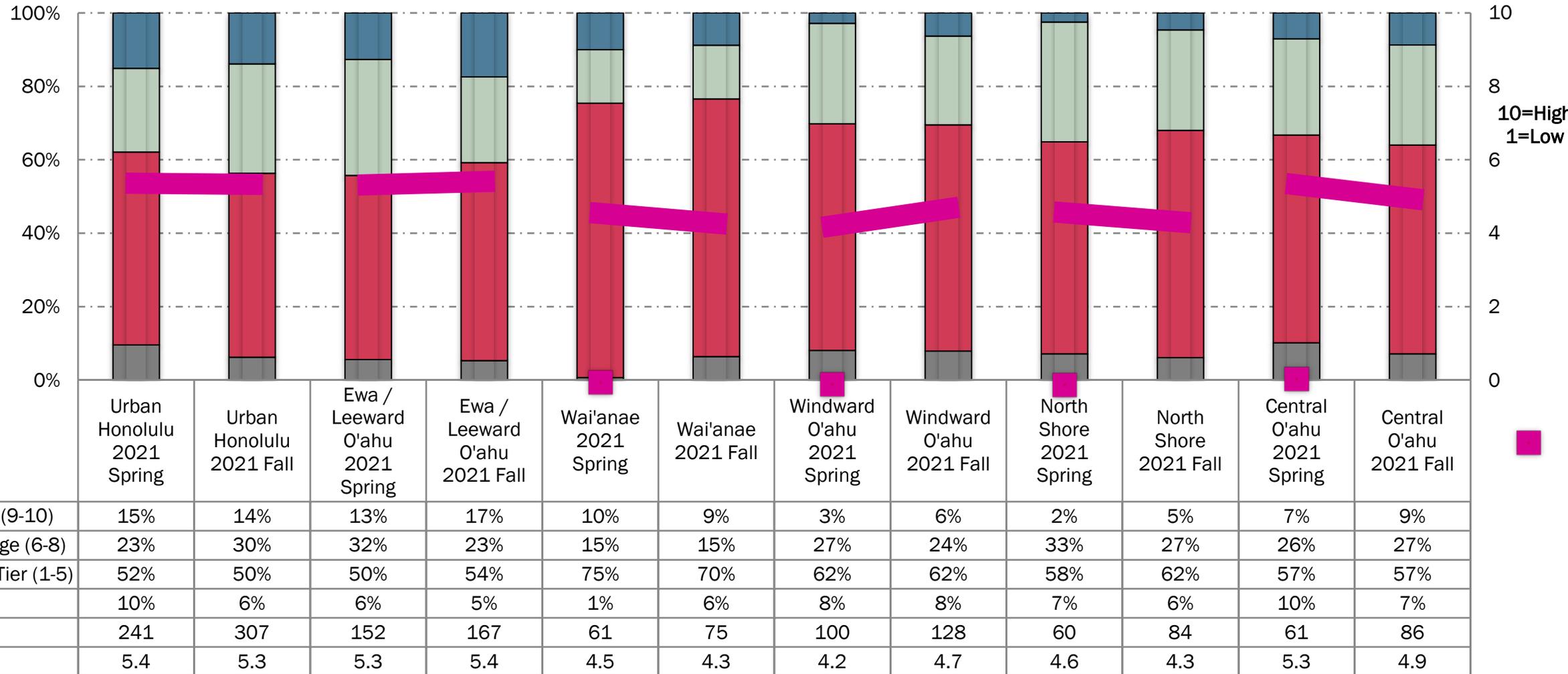


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“I feel like tourism is being better managed on my island” – *By Island*

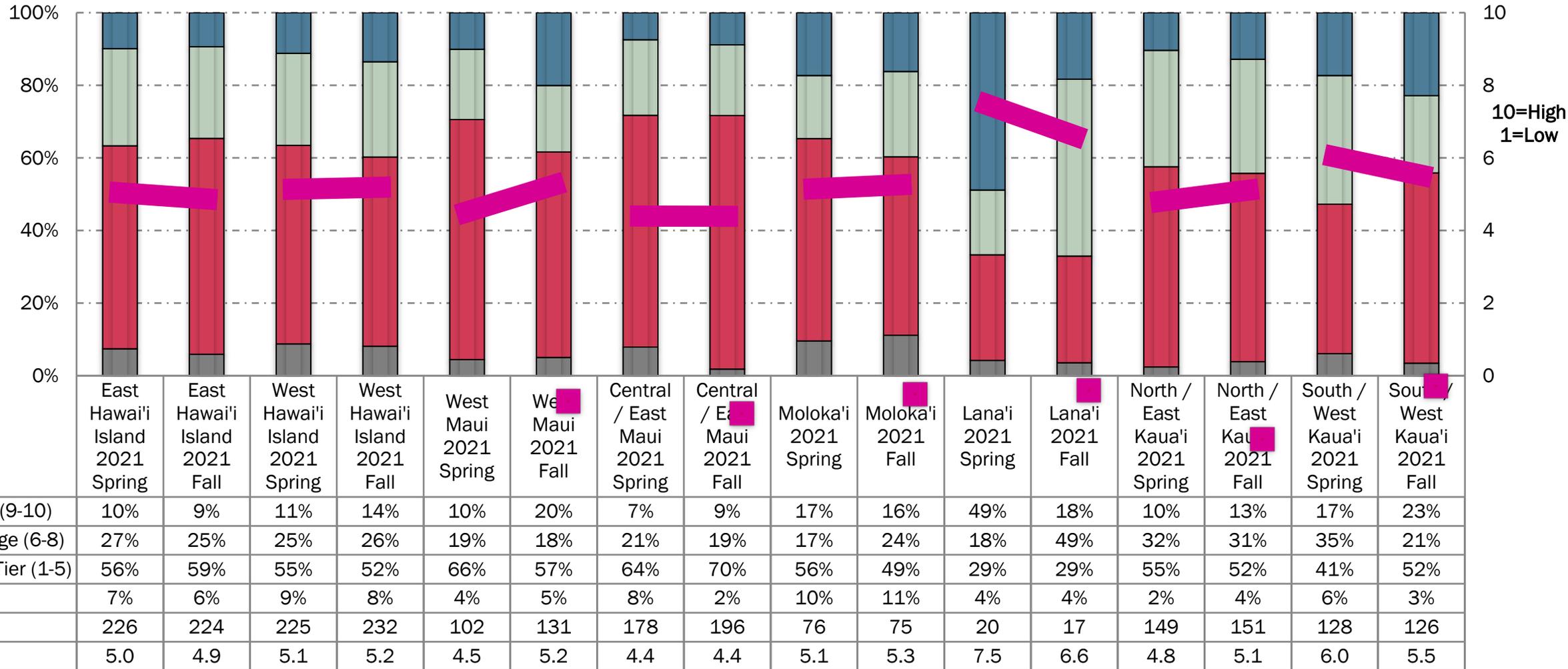


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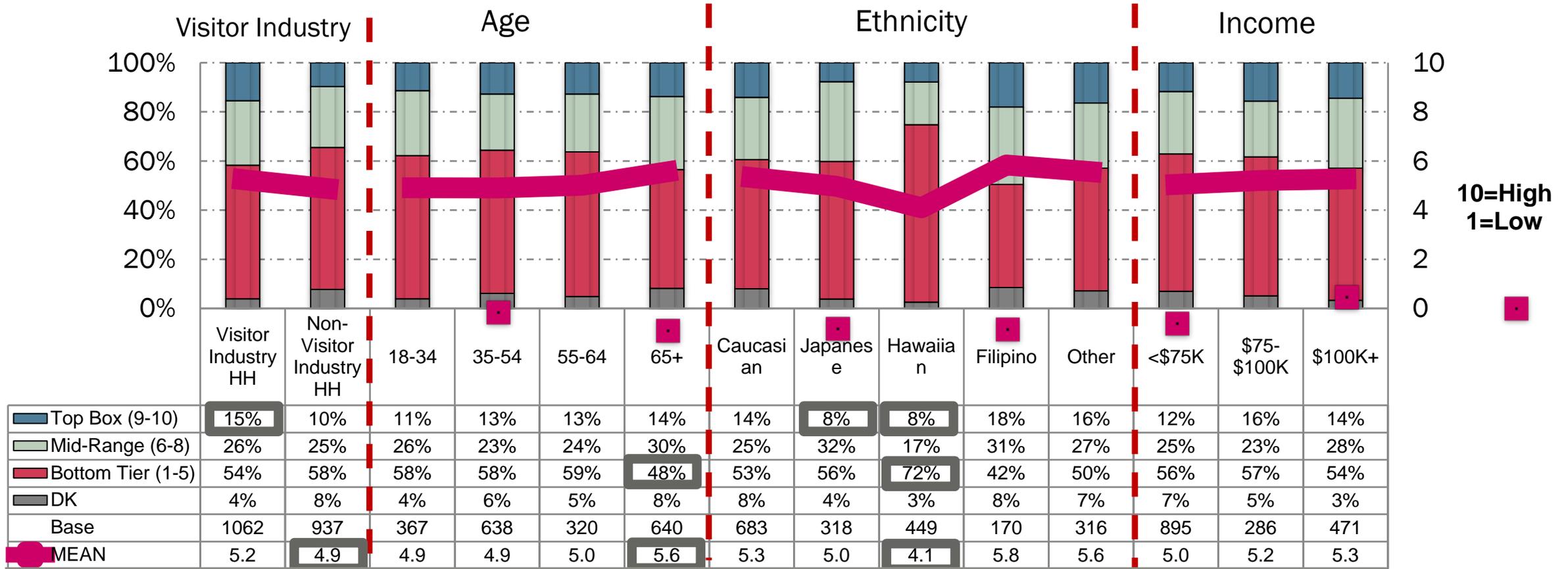
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“I feel like tourism is being better managed on my island” - *By Area* (Hawai'i Island, Maui, & Kaua'i)



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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.



Appendix A: Island Supplement

Key Recommendations & Takeaways – O’ahu

1 *Key Indicators:* Overall indicators of resident sentiment among O’ahu residents continued to weaken in Fall 2021, though the decreases were largely not significant, compared to Spring 2021. An increasing number of residents feel that their island is run for visitors, and that the problems outweigh the benefits. However, more O’ahu residents also say the industry has a positive impact on their families.

Key Resident Sentiment Tracking Statements (O’ahu)				
Mean Score	2019	2020	Spring 2021	Fall 2021
My island is run for tourists at expense of local people	6.91	6.99	6.77	7.01
Tourism has brought more benefits than problems	6.41	6.14	6.00	5.79
Perceived impact of tourism on you and your family	6.52	6.12	5.96	6.02

Although opinions on tourism are weakening, O’ahu tends to be significantly above other areas within the state in agreeing that the industry on the island should be encouraged.

Mean Score	O’ahu	Hawai’i Island	Maui County	Kaua’i
Tourism should be actively encouraged on my island	6.02	5.78	5.21	5.51

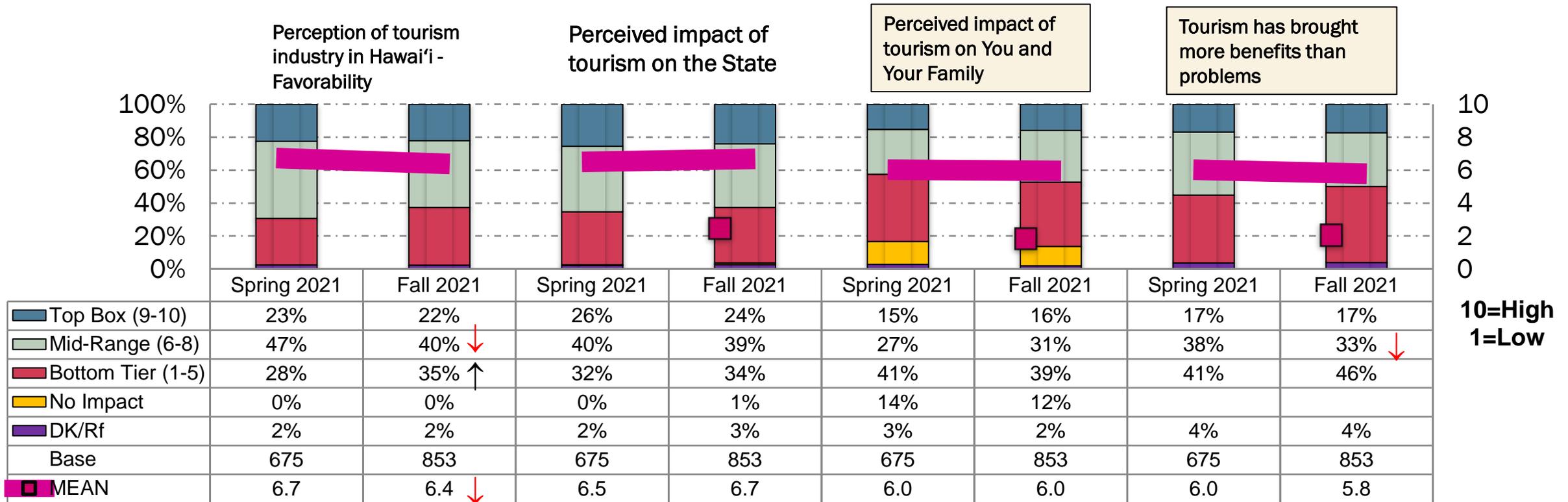
2 *Geographic Differences:* The urban core of Honolulu, ‘Ewa/Leeward, and Central O’ahu residents tended to report positive sentiment on the industry. Those on the Windward, North Shore, and Wai’anae coast were more likely to report negative views on tourism’s benefits and emphasize the resulting problems.

3 *Managed Tourism Strategies:* Residents were in-line with the State overall in their reception to management strategies. While those on O’ahu were generally supportive of measures to manage Accommodations, Access, and Education – residents on other islands, namely 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	7.89	7.76	8.31	8.81
No additional hotel/condo/timeshare units	6.84	6.79	7.20	7.87
Charge visitor access fees to state parks and trails	7.30	7.38	7.95	7.95
Encourage visitors to volunteer and give back	7.15	7.32	7.68	7.77

4 *Perceptions of the Hawai’i Tourism Authority were similar to the State overall, with O’ahu residents reporting a shift in the Authority’s role from Marketing toward better Managing Tourism.*

O'ahu – Key High Level Resident Sentiment Indicators

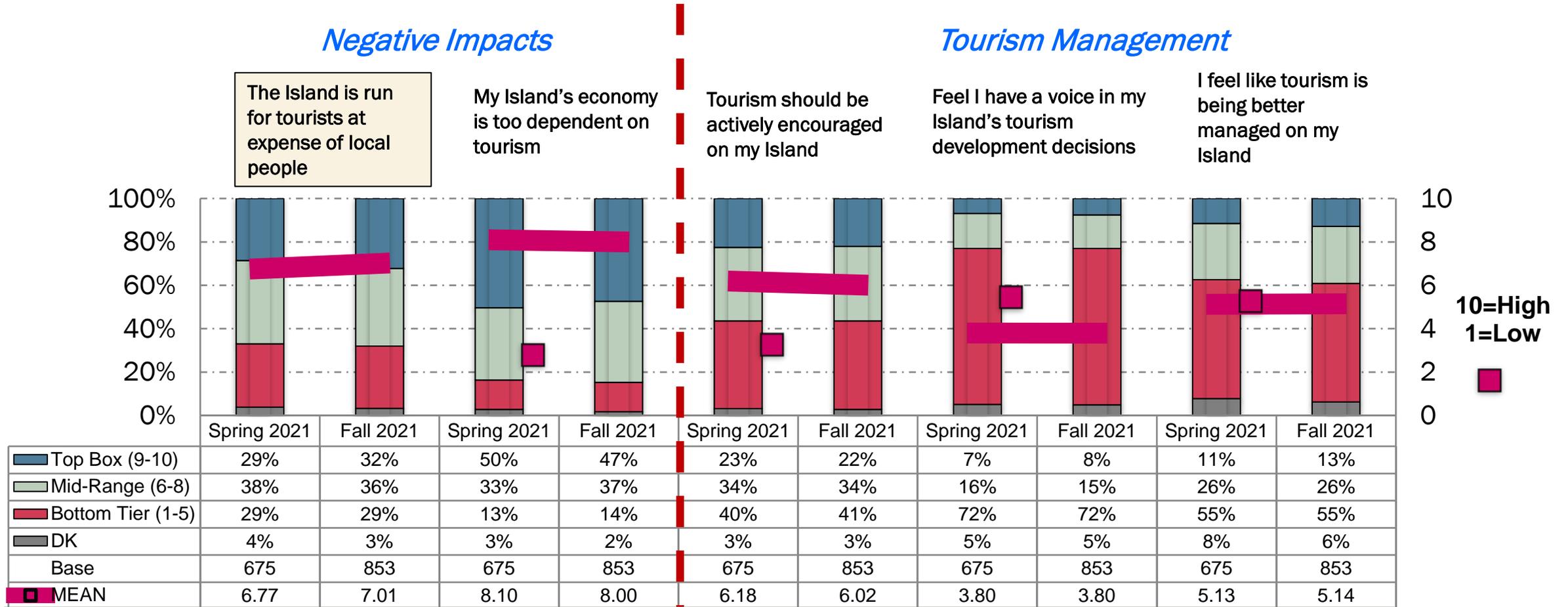


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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



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 *Key Indicators:* Overall indicators of resident sentiment among Maui County residents continued to weaken in Fall 2021, though the decreases were largely not significant, compared to Spring 2021. An increasing number of residents feel that their island is run for visitors, and that the problems outweigh the benefits. However, more Maui County residents also say the industry has a positive impact on their families.

2 *Geographic Differences:* Residents of Lana'i and West Maui are generally more receptive to tourism and its benefits compared to other areas in the county. Residents in these areas perceive a more positive impact of tourism on their families as well as greater economic benefits (well-paying jobs, opportunities for advancement) and preservation of natural resources and Native Hawaiian culture.

Key Resident Sentiment Tracking Statements (Maui County)				
Mean Score	2019	2020	Spring 2021	Fall 2021
My island is run for tourists at expense of local people	7.42	7.08	6.93	7.18
Tourism has brought more benefits than problems	5.47	5.51	5.41	5.21
Perceived impact of tourism on you and your family	6.60	6.33	5.81	5.97

3 *Managed Tourism Strategies:* Residents are more receptive to strategies that aid in reducing the negative impacts of the industry compared to the State overall. Maui County is particularly amenable to better management of **Accommodations and Access** as potential solutions to the problems caused by the industry.

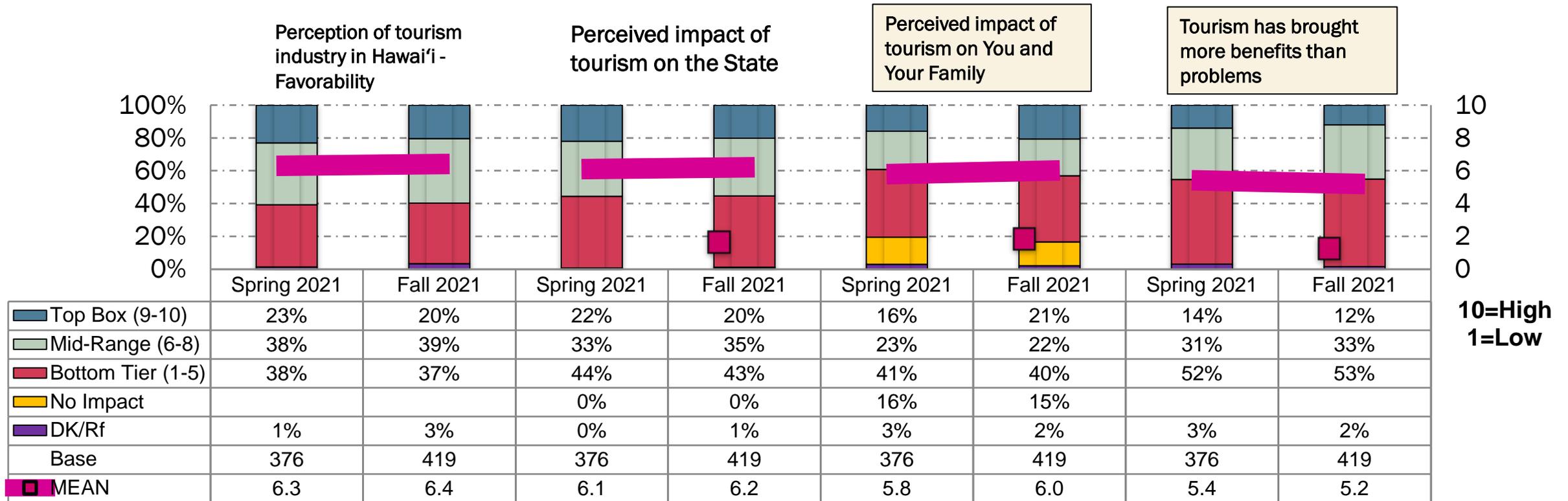
Maui County residents generally reported weaker sentiment on the perceived impacts of tourism on economic and natural/cultural resources.

Mean Score	Maui County	Gap to the State
Eliminate illegal vacation rentals	8.31	0.34
No additional hotel/condo/timeshare units	7.81	0.71
Charge visitor access fees to state parks and trails	7.95	0.53
Encourage visitors to volunteer and give back	7.68	0.41

Mean Score	Maui County	Gap to the State
Creates jobs that have opportunities for advancement	6.05	-0.37
Supports our local businesses	7.11	-0.27
Helps sustain Hawai'i's natural resources	4.59	-0.56
Preserves Native Hawaiian culture	4.18	-0.34

4 *Perception of the Hawai'i Tourism Authority* are particularly positive with Maui County residents reporting higher levels of advocates and mean ratings in agency favorability, leadership, educating visitors, and supporting Native Hawaiian culture.

Maui County – Key High Level Resident Sentiment Indicators

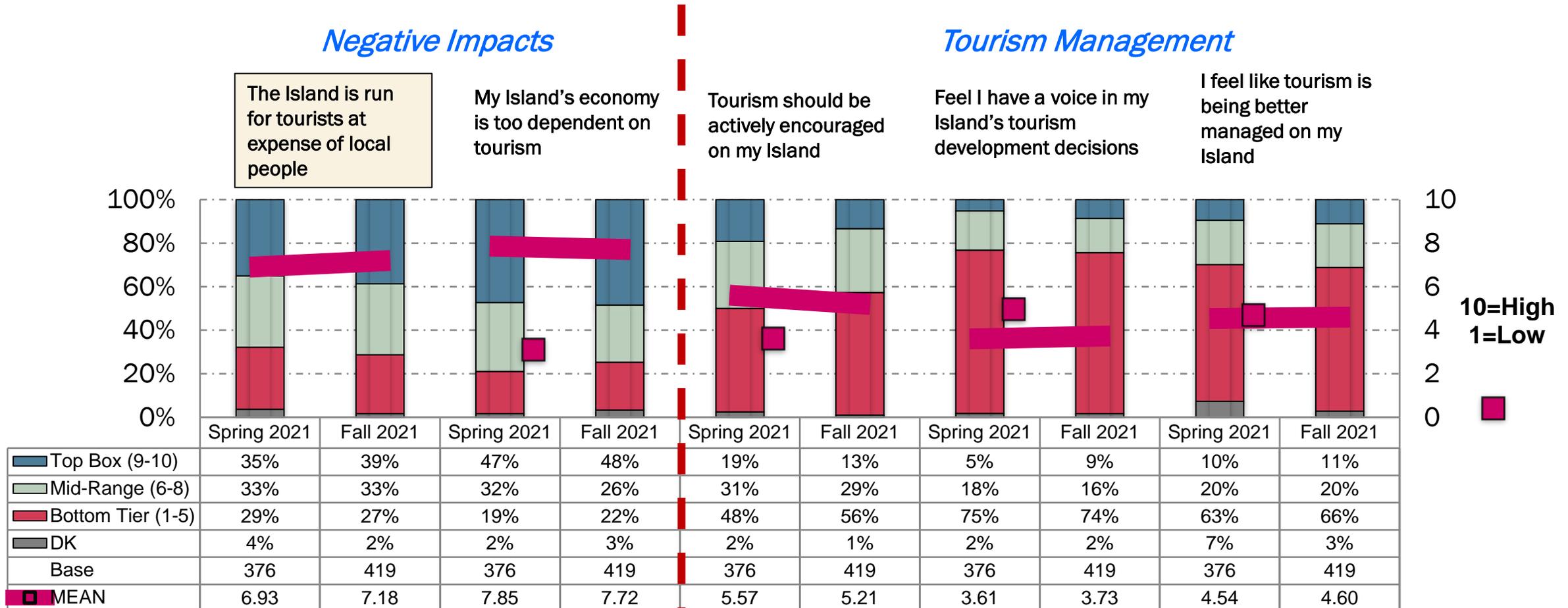


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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 *Key Indicators:* Overall indicators of resident sentiment among Hawai'i Island residents continued to weaken in Fall 2021, though the decreases were largely not significant, compared to Spring 2021. An increasing number of residents feel that their island is run for visitors, and that the problems outweigh the benefits. However, more Hawai'i Island residents also say the industry has a positive impact on their families.

Key Resident Sentiment Tracking Statements (Hawai'i Island)				
Mean Score	2019	2020	Spring 2021	Fall 2021
My island is run for tourists at expense of local people	5.77	6.51	6.59	6.63
Tourism has brought more benefits than problems	6.12	5.86	5.70	5.60
Perceived impact of tourism on you and your family	6.58	6.02	5.81	5.91

Opinions on other tourism indicators for Hawai'i island were similar to the State overall, with the exception that county residents report significant less agreement in feeling that their island is run for tourists and less dependence on the industry compared to the other counties.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
This island is being run for tourists at the expense of local people	7.01	6.63	7.18	7.07
My island's economy is too dependent on tourism	8.00	7.19	7.72	8.14

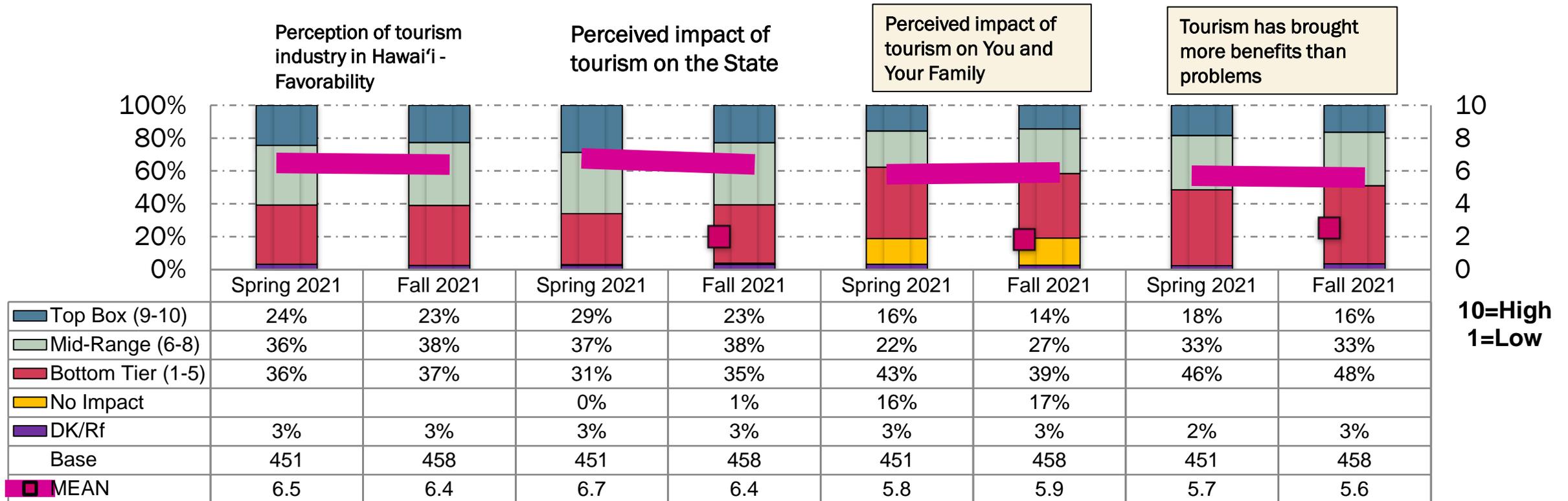
2 *Geographic Differences:* Kailua Kona and the west side of Hawai'i island reported both greater support for the economic benefits of tourism but also larger dependence on the industry. These opinions are an acknowledgement that while residents feel the industry is vital, they also feel beholden to its problems. By contrast, those in Eastern Hawai'i felt fewer of the benefits and less of a dependence.

3 *Managed Tourism Strategies:* Residents were in-line with the State overall in their reception to management strategies. While those on Hawai'i island were generally supportive of measures to manage Accommodations, Access, 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	7.89	7.76	8.31	8.81
No additional hotel/condo/timeshare units	6.84	6.79	7.20	7.87
Charge visitor access fees to state parks and trails	7.30	7.38	7.95	7.95
Encourage visitors to volunteer and give back	7.15	7.32	7.68	7.77

4 *Perceptions of the Hawai'i Tourism Authority were similar to the State overall, with Hawai'i Island residents reporting a shift in the Authority's role from Marketing toward better Managing Tourism.*

Hawai'i Island – Key High Level Resident Sentiment Indicators

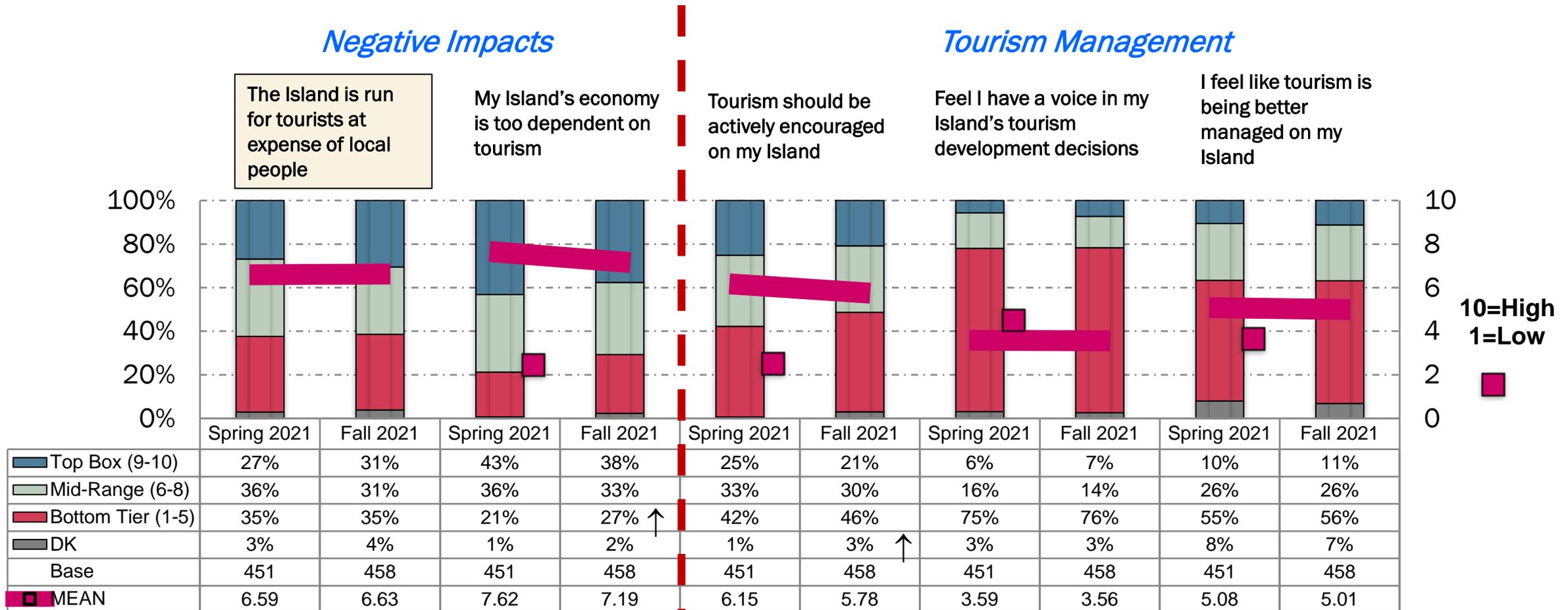


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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 Indicators: Overall indicators of resident sentiment among Kaua'i residents continued to weaken in Fall 2021, though the decreases were largely not significant, compared to Spring 2021. An increasing number of residents feel that their island is run for visitors, and that the problems outweigh the benefits. However, more Kaua'i residents also say the industry has a positive impact on their families.

Key Resident Sentiment Tracking Statements (Kaua'i)				
Mean Score	2019	2020	Spring 2021	Fall 2021
My island is run for tourists at expense of local people	6.73	6.95	7.04	7.07
Tourism has brought more benefits than problems	6.12	6.00	5.48	5.22
Perceived impact of tourism on you and your family	6.44	5.83	5.74	6.27

Kaua'i resident attitudes reflect an appreciation for the economic benefits of tourism (i.e., much more supportive than the State overall), while noting concerns of the potential negative impacts caused to Native Hawaiian culture (i.e., lower than the State overall).

Mean Score	Kaua'i	Gap to the State
Creates many well-paying jobs for residents	6.6	0.24
Supports our local businesses	7.8	0.39
Helps to preserves Native Hawaiian culture	4.3	-0.25
Supports other industries like agriculture	5.4	-0.29

2

Geographic Differences: Residents expressed few differences in sentiment when comparing communities within the island. There were no statistically significant regional differences in their perceptions of the industry.

3

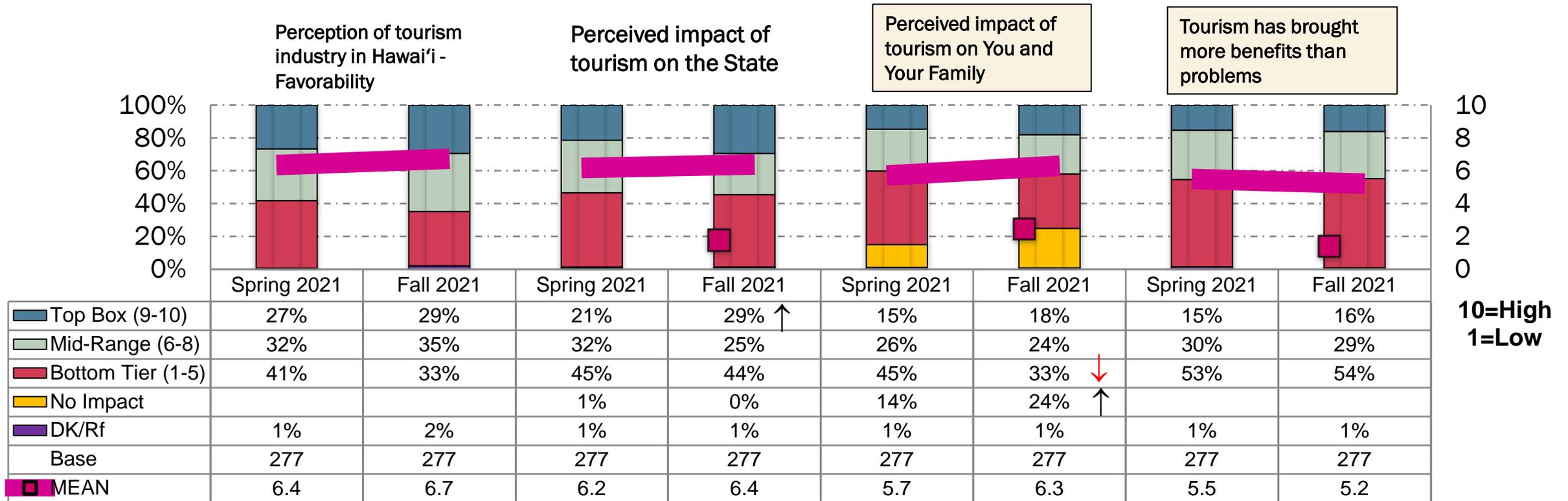
Managed Tourism Strategies: Those on Kaua'i were supportive of strategies to better manage the industry compared to the State overall related to Accommodations, Access, and Educating visitors in order to mitigate the negative impacts.

Mean Score	Kaua'i	Gap to the State
Eliminate illegal vacation rentals	8.81	0.84
No additional hotel/condo/timeshare units	8.13	1.02
Charge visitor access fees to state parks and trails	7.95	0.53
Encourage visitors to volunteer and give back	7.77	0.50

4

Perception of the Hawai'i Tourism Authority are particularly positive with Kauai residents reporting higher levels of advocates and mean ratings in agency favorability, leadership, educating visitors, and supporting Native Hawaiian culture.

Kaua'i – Key High Level Resident Sentiment Indicators

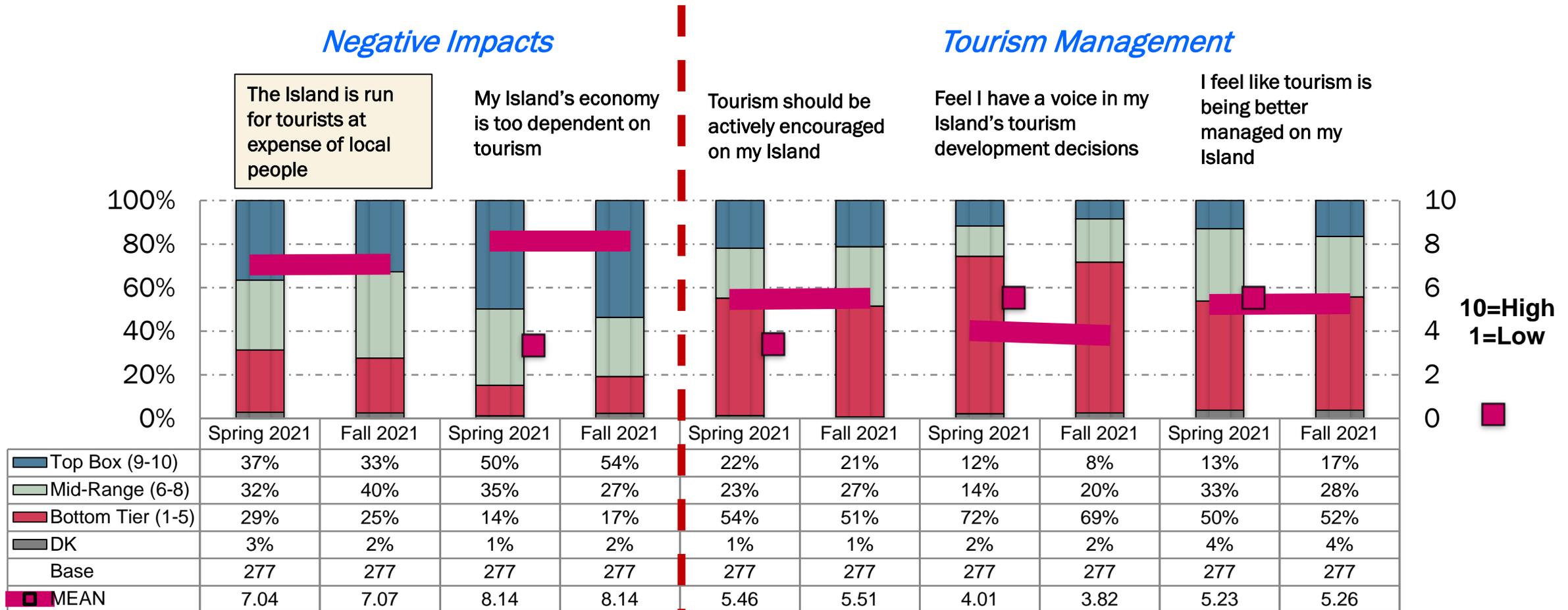


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

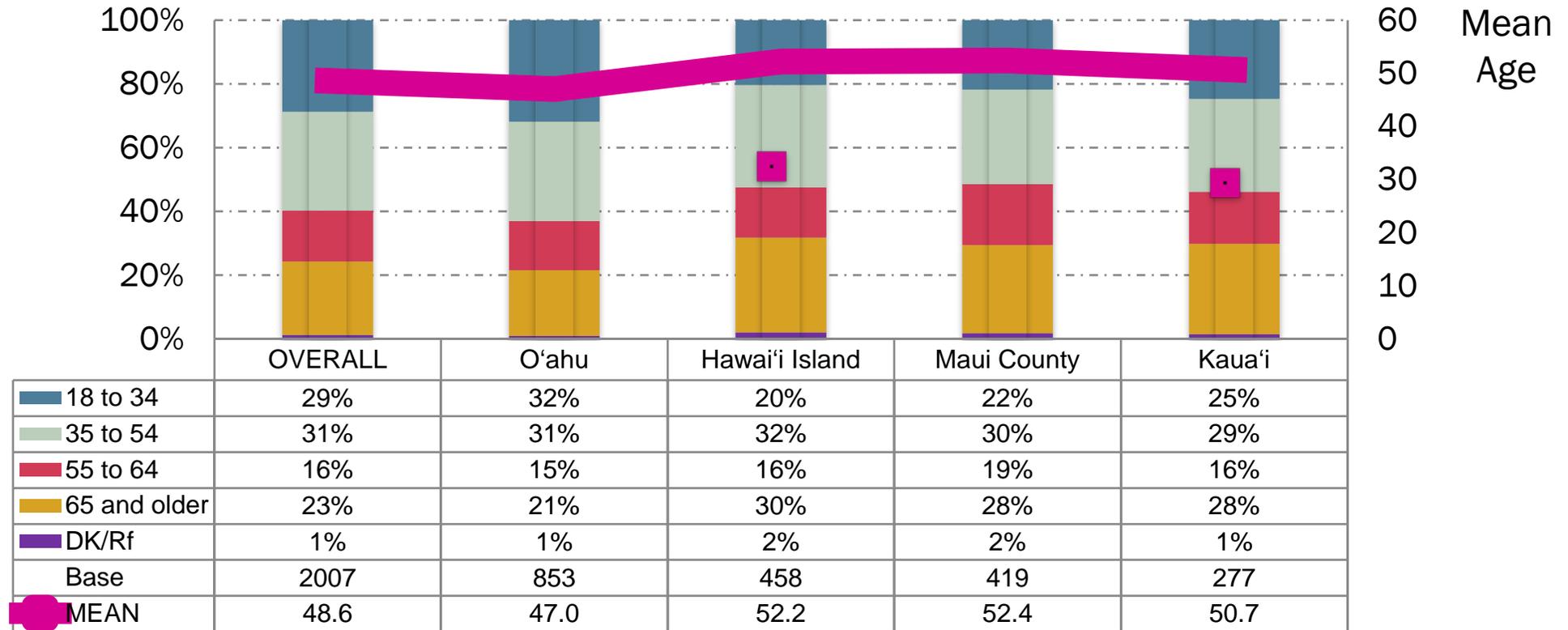


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?



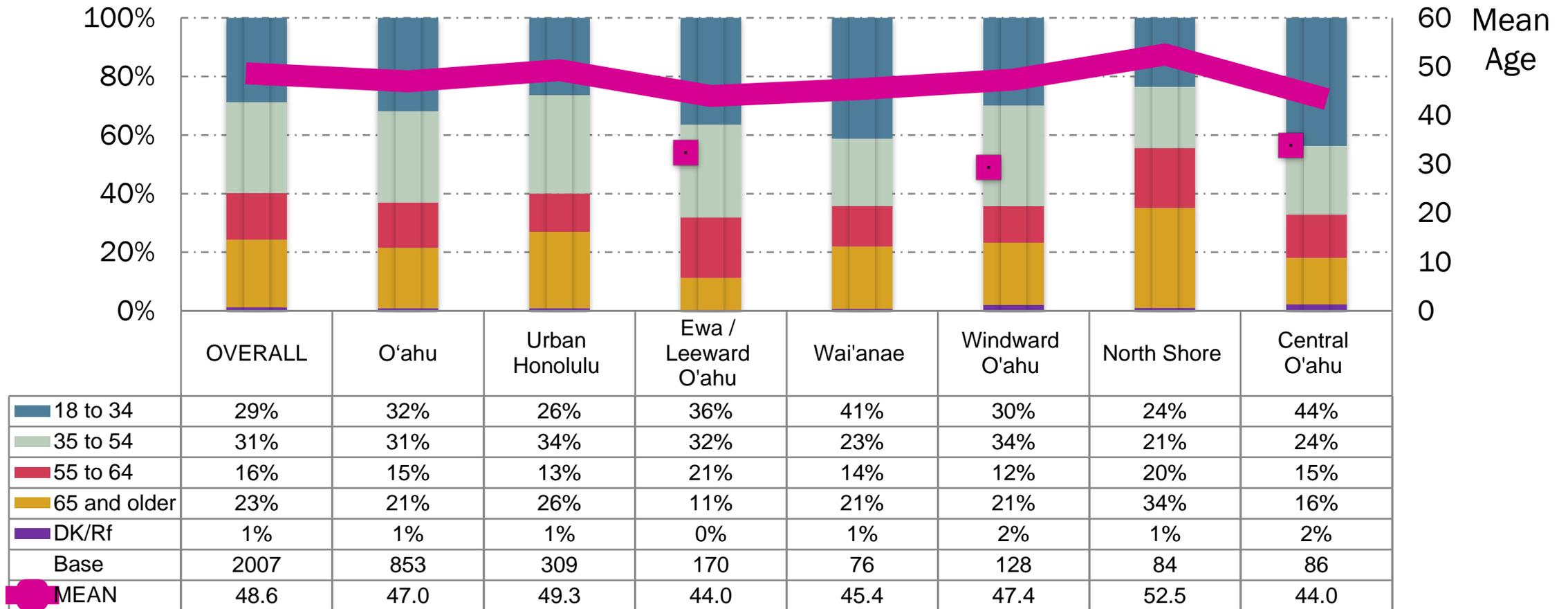
Appendix B: Respondent Profile

Respondent Age



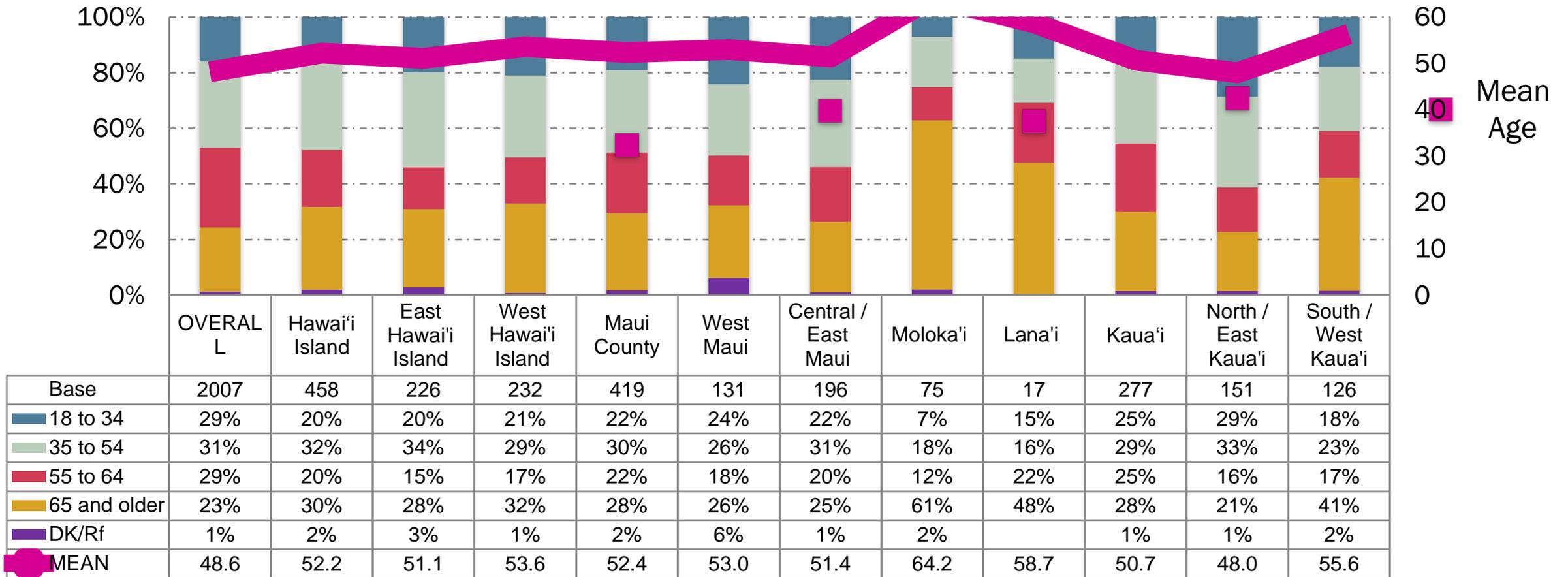
D1: What was your age on your last birthday?

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	19%	15%	31%	29%	26%
Japanese	18%	22%	9%	7%	10%
Hawaiian	23%	21%	25%	28%	25%
Filipino	10%	9%	9%	14%	18%
Other	30%	33%	26%	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	19%	15%	14%	13%	10%	25%	30%	14%
Japanese	18%	22%	30%	21%	4%	11%	2%	27%
Hawaiian	23%	21%	14%	19%	71%	29%	35%	12%
Filipino	10%	9%	6%	17%	3%	4%	4%	10%
Other	30%	33%	37%	30%	12%	31%	29%	37%

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Caucasian	19%	31%	25%	39%	29%	31%	29%	23%	20%	26%	27%	24%
Japanese	18%	9%	13%	5%	7%	8%	7%	4%	16%	10%	9%	11%
Hawaiian	23%	25%	25%	26%	28%	24%	29%	44%	12%	25%	22%	28%
Filipino	10%	9%	10%	8%	14%	10%	14%	10%	40%	18%	18%	19%
Other	30%	26%	28%	24%	21%	27%	21%	18%	12%	22%	24%	18%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	45%	43%	53%	45%	45%
3-4	34%	36%	27%	30%	32%
5-6	11%	10%	12%	15%	12%
7+	10%	10%	9%	10%	11%
REFUSED	5%	5%	4%	4%	5%
MEAN	3.0	3.0	2.9	3.1	3.2

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	45%	43%	54%	35%	28%	39%	38%	38%
3-4	34%	36%	33%	39%	44%	36%	35%	41%
5-6	11%	10%	7%	14%	13%	11%	14%	12%
7+	10%	10%	6%	12%	15%	14%	13%	9%
REFUSED	5%	5%	4%	4%	7%	8%	6%	8%
MEAN	3.0	3.0	2.6	3.5	3.5	3.2	3.5	3.0

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	45%	53%	53%	53%	45%	39%	45%	55%	48%	45%	43%	49%
3-4	34%	27%	26%	28%	30%	23%	32%	22%	23%	32%	36%	26%
5-6	11%	12%	12%	10%	15%	20%	14%	16%	10%	12%	11%	12%
7+	10%	9%	8%	9%	10%	18%	8%	7%	19%	11%	10%	12%
REFUSED	5%	4%	4%	4%	4%	12%	3%	5%	4%	5%	5%	3%
MEAN	3.0	2.9	2.9	3.0	3.1	3.5	3.1	2.8	3.9	3.2	3.3	3.2

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	29%	30%	26%	27%	31%
Married	48%	49%	43%	50%	44%
Divorced, separated, widowed	16%	14%	21%	17%	19%
Domestic Partnership	4%	4%	5%	2%	1%
Other	0%	1%	0%	0%	--
Refused	3%	3%	4%	4%	5%

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	29%	30%	32%	28%	33%	30%	30%	20%
Married	48%	49%	46%	51%	28%	49%	57%	66%
Divorced, separated, widowed	16%	14%	15%	13%	23%	16%	10%	7%
Domestic Partnership	4%	4%	5%	4%	10%	3%	2%	4%
Other	0%	1%	0%	1%	--	1%	--	--
Refused	3%	3%	3%	3%	7%	2%	2%	3%

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Single, never married	29%	26%	26%	26%	27%	31%	27%	14%	22%	31%	35%	24%
Married	48%	43%	42%	45%	50%	44%	50%	60%	57%	44%	40%	50%
Divorced, separated, widowed	16%	21%	22%	20%	17%	14%	17%	21%	22%	19%	18%	22%
Domestic Partnership	4%	5%	5%	6%	2%	1%	3%	--	--	1%	0%	2%
Other	0%	0%	0%	1%	0%	--	--	1%	--	--	--	--
Refused	3%	4%	5%	2%	4%	9%	3%	3%	--	5%	6%	3%

D4: What is your marital status?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	21%	19%	24%	23%	31%
Bus/ Trade School/Some college	29%	29%	27%	35%	22%
College Graduate	48%	50%	45%	38%	45%
DK/Refused	2%	2%	4%	5%	2%

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%	19%	14%	20%	45%	22%	28%	20%
Bus/ Trade School/Some college	29%	29%	28%	32%	31%	28%	14%	30%
College Graduate	48%	50%	57%	45%	20%	49%	56%	49%
DK/Refused	2%	2%	1%	3%	3%	1%	2%	1%

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
H.S. or less	21%	24%	20%	29%	23%	28%	22%	26%	28%	31%	35%	23%
Bus/ Trade School/Some college	29%	27%	33%	19%	35%	26%	37%	32%	30%	22%	21%	24%
College Graduate	48%	45%	42%	50%	38%	39%	37%	38%	39%	45%	42%	50%
DK/Refused	2%	4%	4%	2%	5%	7%	5%	4%	4%	2%	2%	3%

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

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	61%	63%	57%	59%	64%
Not Employed	39%	37%	43%	41%	36%

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	61%	63%	61%	65%	58%	60%	52%	70%
Not Employed	39%	37%	39%	35%	42%	40%	48%	30%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	61%	57%	52%	64%	59%	61%	60%	39%	48%	64%	71%	52%
Not Employed	39%	43%	48%	36%	41%	39%	40%	61%	52%	36%	29%	48%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	38%	37%	39%	37%	39%
FEMALE	62%	63%	61%	63%	61%

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	38%	37%	42%	36%	32%	30%	31%	35%
FEMALE	62%	63%	58%	64%	68%	70%	69%	65%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
MALE	38%	39%	36%	43%	37%	48%	36%	23%	37%	39%	42%	34%
FEMALE	62%	61%	64%	57%	63%	52%	64%	77%	63%	61%	58%	66%

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	13%	14%	9%	12%	13%
Management	6%	7%	4%	4%	4%
Admin/clerical	9%	9%	8%	6%	7%
Service	6%	5%	5%	8%	6%
Sales	7%	8%	6%	5%	5%
Retired	19%	17%	25%	24%	26%
Other	25%	24%	30%	28%	27%
Unemployed	26%	24%	32%	29%	30%

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	13%	14%	14%	14%	6%	16%	14%	16%
Management	6%	7%	7%	7%	4%	8%	5%	6%
Admin/clerical	9%	9%	7%	12%	12%	4%	18%	15%
Service	6%	5%	6%	5%	8%	3%	7%	4%
Sales	7%	8%	10%	8%	8%	3%	--	6%
Retired	19%	17%	20%	12%	19%	16%	31%	12%
Other	25%	24%	22%	26%	18%	31%	12%	24%
Unemployed	26%	24%	26%	20%	30%	29%	38%	15%

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Professional	13%	9%	7%	11%	12%	12%	12%	9%	7%	13%	12%	15%
Management	6%	4%	4%	4%	4%	10%	3%	3%	6%	4%	4%	4%
Admin/clerical	9%	8%	9%	6%	6%	4%	6%	3%	5%	7%	9%	2%
Service	6%	5%	2%	10%	8%	6%	8%	3%	10%	6%	7%	5%
Sales	7%	6%	6%	6%	5%	9%	4%	1%	10%	5%	5%	4%
Retired	19%	25%	26%	24%	24%	26%	22%	55%	37%	26%	20%	36%
Other	25%	30%	31%	30%	28%	18%	31%	19%	24%	27%	29%	23%
Unemployed	26%	32%	35%	27%	29%	28%	28%	57%	37%	30%	24%	39%

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	13%	12%	18%	12%	9%
\$25K-\$35K	9%	9%	10%	9%	7%
\$35K-\$50K	12%	13%	11%	8%	8%
\$50K-\$75K	15%	14%	17%	16%	11%
\$75K-\$100K	15%	15%	14%	15%	13%
\$100K-\$150K	15%	16%	11%	12%	19%
\$150K-\$200K	6%	8%	3%	5%	4%
\$200K+	3%	4%	2%	2%	4%
DK/ Rf	13%	10%	15%	21%	24%

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	13%	12%	13%	10%	24%	13%	9%	3%
\$25K-\$35K	9%	9%	10%	9%	10%	9%	6%	11%
\$35K-\$50K	12%	13%	14%	8%	16%	13%	4%	21%
\$50K-\$75K	15%	14%	16%	17%	11%	13%	9%	4%
\$75K-\$100K	15%	15%	12%	19%	11%	17%	11%	19%
\$100K-\$150K	15%	16%	17%	18%	5%	9%	14%	18%
\$150K-\$200K	6%	8%	5%	12%	2%	5%	4%	16%
\$200K+	3%	4%	4%	4%	3%	5%	7%	--
DK/ Rf	13%	10%	8%	5%	18%	17%	35%	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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
<\$25K	13%	18%	20%	14%	12%	12%	13%	9%	--	9%	10%	9%
\$25K-\$35K	9%	10%	11%	9%	9%	5%	10%	13%	11%	7%	8%	7%
\$35K-\$50K	12%	11%	12%	9%	8%	4%	8%	13%	4%	8%	9%	5%
\$50K-\$75K	15%	17%	18%	15%	16%	12%	16%	22%	14%	11%	8%	17%
\$75K-\$100K	15%	14%	14%	13%	15%	8%	16%	11%	20%	13%	11%	17%
\$100K-\$150K	15%	11%	9%	13%	12%	14%	11%	6%	18%	19%	19%	18%
\$150K-\$200K	6%	3%	2%	4%	5%	12%	4%	3%	--	4%	6%	1%
\$200K+	3%	2%	1%	4%	2%	6%	2%	1%	4%	4%	5%	1%
DK/ Rf	13%	15%	13%	18%	21%	29%	20%	23%	30%	24%	24%	25%

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	17%	18%	17%	12%	9%
10 to 19 years	8%	7%	10%	10%	6%
20 years or more	22%	21%	24%	29%	21%
Born in Hawai'i	52%	53%	46%	45%	60%
DK/ Rf	2%	1%	2%	4%	4%

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	17%	18%	19%	17%	8%	18%	7%	25%
10 to 19 years	8%	7%	7%	9%	3%	11%	4%	3%
20 years or more	22%	21%	18%	24%	13%	19%	44%	21%
Born in Hawai'i	52%	53%	55%	49%	76%	51%	43%	50%
DK/ Rf	2%	1%	1%	1%	1%	1%	1%	1%

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	Lana'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Less than 10 years	17%	17%	16%	19%	12%	15%	12%	8%	4%	9%	9%	8%
10 to 19 years	8%	10%	7%	13%	10%	15%	9%	6%	18%	6%	6%	6%
20 years or more	22%	24%	24%	25%	29%	37%	27%	31%	45%	21%	21%	22%
Born in Hawai'i	52%	46%	50%	41%	45%	29%	47%	52%	29%	60%	59%	61%
DK/ Rf	2%	2%	3%	1%	4%	3%	4%	3%	4%	4%	5%	3%

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



Mahalo from the OmniTrak Group