HTA Resident Sentiment Survey 2021 Highlights
What’s the **Big** Idea?

While many are concerned with visitor industry growth, the majority of Hawai‘i residents believe that tourism is worth the issues associated with the industry.

1. Resident’s benchmark ratings of current efforts to better manage tourism are mixed, but such initiatives play an important role in influencing resident sentiment.

2. Moving forward, initiatives that grow the Economic and Quality of Life benefits of tourism, integrated with Managed Tourism efforts, hold the most influence for improving resident sentiment.
Is Tourism in Hawai‘i Worth it?
“Do you think tourism is worth the issues associated with the industry?” – *By Island*

Q3. In 2019, visitors spent nearly $18 billion in Hawai’i, which produced $2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?
Q3. In 2019, visitors spent nearly $18 billion in Hawai‘i, which produced $2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?
“Do you think tourism is worth the issues associated with the industry?” – *By Number of Years of Living in Hawai‘i*

Q3. In 2019, visitors spent nearly $18 billion in Hawai‘i, which produced $2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?
Resident Ratings of Overall Tourism Management Efforts - Benchmark
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – By Island

Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” –  By Demographics

Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.
"I feel like tourism is being better managed on my island" – By Island

<table>
<thead>
<tr>
<th></th>
<th>OVERALL 2021</th>
<th>O'ahu 2021</th>
<th>Hawai'i Island 2021</th>
<th>Maui County 2021</th>
<th>Kaua'i 2021</th>
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<tr>
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<tr>
<td>Mid-Range (6-8)</td>
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<tr>
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<td>DK/Rf</td>
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<td>1779</td>
<td>675</td>
<td>451</td>
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<tr>
<td>MEAN</td>
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<td>5.13</td>
<td>5.08</td>
<td>4.54</td>
<td>5.23</td>
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</table>

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

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

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?

**Regenerative**
- Educate visitors and residents to malama the islands and each other
- Encourage visitors to volunteer & give back during their visits to Hawai’i

**Accommodations**
- Eliminate illegal vacation rentals on my island
- Stop approval of additional legal vacation rentals on my island
- Do not allow building of additional hotel/condo/timeshare units on my island

**Access**
- Charge visitor access fees to state parks and trails
- Designate resident-only days of the week at some state parks, beaches and trails

Top Box (9-10)
- 67%
- 56%
- 56%
- 38%
- 67%

Mid-Range (6-8)
- 21%
- 20%
- 21%
- 25%
- 23%

Bottom Tier (1-5)
- 9%
- 3%
- 3%
- 5%
- 3%

DK
- 3%
- 5%
- 6%
- 5%
- 5%

Base
- 1,779
- 1,779
- 1,779
- 1,779
- 1,779

MEAN
- 8.75
- 7.08
- 7.92
- 6.83
- 7.12

10=High
1=Low

Educate visitors and residents to malama the islands and each other
Do not allow building of additional hotel/condo/timeshare units on my island
Eliminate illegal vacation rentals on my island
Stop approval of additional legal vacation rentals on my island
Charge visitor access fees to state parks and trails
Designate resident-only days of the week at some state parks, beaches and trails
“Educate visitors and residents to malama 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?
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?
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“Stop approval of additional legal vacation rentals on my island” – By Island

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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 Island**

<table>
<thead>
<tr>
<th>Island</th>
<th>Top Box (9-10)</th>
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<th>Bottom Tier (1-5)</th>
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<th>MEAN</th>
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<td>OVERALL 2021</td>
<td>39%</td>
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<td>31%</td>
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<td>1779</td>
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<td>O’ahu 2021</td>
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<td>Kaua’i 2021</td>
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<td>18%</td>
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<td>0%</td>
<td>277</td>
<td>7.68</td>
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</table>

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?
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Drivers of Resident Sentiment
Drivers of Resident Sentiment

- Economic Impact: 42%
- Quality of Life: 14%
- Managed Tourism: 12%
- Sustainability: 11%
- Negative impacts: 11%
- Manage Access & Accommodations: 10%

**Economic + Quality of Life + Managed Tourism: 68%**

- Supports local businesses
  - Creates well-paying jobs
  - Supports other industries
- Manage Access & Accommodations: 10%
- Economic Impact: 42%
- Quality of Life: 14%

- Island is run for tourists at the expense of locals
- Helps preserve Native Hawaiian culture, natural resources
- Feel like more effort is being made to balance economic benefits and quality of life for residents
- Charge visitor access fees
- Eliminate illegal vacation rentals

"Tourism has brought more benefits than problems"
Overview of Spring 2021
Resident Sentiment Indicators
High Level Indicators of Resident Sentiment

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?

Q4. 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.
Economic Impact

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.
Economic Impact (…continued)/Quality of Life

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### 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.

**Sustainability**

- Helps sustain Hawai‘i’s natural resources, parks and cultural sites
- Helps preserve Native Hawaiian culture and language
- Tourism presents Native Hawaiian culture in authentic manner

**Negative Impacts**

- Island is run for tourists at expense of local people
- Island economy is too dependent on tourism

#### Scores

<table>
<thead>
<tr>
<th>Top Box (9-10)</th>
<th>Mid-Range (6-8)</th>
<th>Bottom Tier (1-5)</th>
<th>DK/Rf Base</th>
<th>MEAN</th>
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<td>34%</td>
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<td>2%</td>
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0=Low 10=High
Mahalo from the Omnitrak Group
Appendix
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 17 times since 1999, and the current survey was conducted by Omnitrac 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 Omniktrak. 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. The sample includes both landline (31%) and cellular (15%) phones; and an online component (54%)

Statewide sampling produced a total of \( n = 1,779 \) respondents as follows:
- O'ahu: 675
- Hawai'i Island: 451
- Maui County: 376
- Kaua'i: 277

Methodology
- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI) and online surveys. Just under half (46%) respondents completed the survey via telephone, and the remainder (54%) completed the survey online.
- All calls were placed from Omniktrak’s continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates:
  - April 27 through June 3, 2021
“Do you think tourism is worth the issues associated with the industry?” - **By Area**

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?
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - By Area

<table>
<thead>
<tr>
<th>Area</th>
<th>Base</th>
<th>MEAN</th>
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<tbody>
<tr>
<td>Urban Honolulu 2021</td>
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<tr>
<td>Ewa / Leeward O‘ahu 2021</td>
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<tr>
<td>Wa‘ianae 2021</td>
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<td>Windward O‘ahu 2021</td>
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<tr>
<td>South / West Kaua‘i 2021</td>
<td>128</td>
<td>5.8</td>
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“I feel like tourism is being better managed on my island” - By Area

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

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.
Problems Created by Tourism in Hawai‘i (2021 only)
(According to residents saying Hawai‘i tourism creates more problems than benefits)

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

- **OVERCROWDING (NET)**
  - Overcrowding: 66%
  - No supporting infrastructure: 1%
  - Less access for “locals”: 1%

- **TRAFFIC PROBLEMS**
  - Damage to the environment: 63%
  - Mismanagement of natural resources: 1%
  - Overdevelopment: 1%
  - Higher prices/higher cost of living: 1%
  - No affordable housing, housing for “locals”: 1%
  - Less access for “locals”: 1%

- **DAMAGE TO THE ENVIRONMENT (NET)**
  - Overdevelopment: 60%
  - Higher prices/higher cost of living: 58%

- **HIGH PRICES/HIGHER COST OF LIVING (NET)**
  - Higher prices/higher cost of living: 55%
  - No affordable housing, housing for “locals”: 55%

- **TOO DEPENDENT ON TOURISM**
  - Increased crime: 51%

- **NO RESPECT FOR CULTURE/TRADITION/‘AINA**
  - Health concerns, viruses, potential for epidemics: 49%
  - Locals don’t benefit from tourism money: 49%

- **HIGH PRICES/HIGHER COST OF LIVING (NET)**
  - Higher prices/higher cost of living: 49%

- **LOCALS DON’T BENEFIT FROM TOURISM MONEY**
  - Increased crime: 29%

- **CRIME (NET)**
  - Increased crime: 20%

- **LOSS OF CULTURAL/COMMUNITY SENSITIVITY**
  - Tourism/tourists are given priority: 2%
  - Vacations rental issues: <1%
  - Other: <1%
  - None/don’t know: 1%

- **REFUSED**
  - 4%

**Base:** 808
Problems Created by Tourism in Hawai‘i (2021 vs. 2020)
(According to residents saying Hawai‘i tourism creates more problems than benefits)

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Problems Created by Tourism in Hawai‘i: O‘ahu Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

- Overcrowding: 68% (2021), 66% (2020)
- Traffic problems: 59% (2021), 66% (2020)
- Damage to the environment: 58% (2021), 63% (2020)
- Too dependent on tourism: 59% (2021), 63% (2020)
- High prices/higher cost of living: 50% (2021), 55% (2020)
- No respect for culture/tradition/‘aina: 39% (2021), 53% (2020)
- Health concerns, potential for epidemics: 45% (2021), 52% (2020)
- Locals don’t benefit from tourism money: 23% (2021), 33% (2020)
- Crime: 24% (2021), 27% (2020)
- Loss of cultural/community sensitivity: 1% (2021), 3% (2020)
- Tourism/tourists are given priority: 1% (2021), 2% (2020)
- Vacation rental issues: 1% (2021), 1% (2020)
- Influx of newcomers: <1% (2021), 3% (2020)
- Tourist safety an issue: <1% (2021), 1% (2020)
- Creates low paying jobs, no advancement: <1% (2021), 2% (2020)

Base: 2021 (283), 2020 (266)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Problems Created by Tourism in Hawai‘i: Maui County Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

1. OVERCROWDING
2. HIGH PRICES/HIGHER COST OF LIVING
3. TRAFFIC PROBLEMS
4. DAMAGE TO THE ENVIRONMENT
5. HEALTH CONCERNS, POTENTIAL FOR EPIDEMICS
6. TOO DEPENDENT ON TOURISM
7. NO RESPECT FOR CULTURE/TRADITION/‘AINA
8. LOCALS DON’T BENEFIT FROM TOURISM MONEY
9. CRIME
10. CREATES LOW PAYING JOBS, NO ADVANCEMENT
11. LOSS OF CULTURAL/COMMUNITY SENSITIVITY
12. TOURIST SAFETY AN ISSUE
13. INFLUX OF NEWCOMERS
14. TOURISM/TOURISTS ARE GIVEN PRIORITY
15. VACATION RENTAL ISSUES

Base: 2021 (195), 2020 (189)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Problems Created by Tourism in Hawai‘i: Kaua‘i Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

TRAFFIC PROBLEMS: 65%
OVERCROWDING: 70%
DAMAGE TO THE ENVIRONMENT: 57%
HIGH PRICES/HIGHER COST OF LIVING: 48%
NO RESPECT FOR CULTURE/TRADITION/‘AINA: 51%
HEALTH CONCERNS, POTENTIAL FOR EPIDEMICS: 36%
TOO DEPENDENT ON TOURISM: 33%
LOCALS DON’T BENEFIT FROM TOURISM MONEY: 20%
CRIME: 15%
CREATES LOW PAYING JOBS, NO ADVANCEMENT: 13%
LOSS OF CULTURAL/COMMUNITY SENSITIVITY: 11%
VACATION RENTAL ISSUES: 7%
TOURISM/TOURISTS ARE GIVEN PRIORITY: 2%
TOURIST SAFETY AN ISSUE: 1%
INFLUX OF NEWCOMERS: <1%

Base: 2021 (139), 2020 (95)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Problems Created by Tourism in Hawai‘i: Hawai‘i Island Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

- Overcrowding: 55% (2021), 53% (2020)
- High prices/higher cost of living: 48% (2021), 52% (2020)
- Damage to the environment: 50% (2021), 50% (2020)
- Traffic problems: 49% (2021), 49% (2020)
- Health concerns, potential for epidemics: 46% (2021), 46% (2020)
- No respect for culture/tradition/‘aina: 46% (2021), 46% (2020)
- Too dependent on tourism: 38% (2021), 38% (2020)
- Locals don’t benefit from tourism money: 24% (2021), 15% (2020)
- Crime: 26% (2021), 15% (2020)
- Loss of cultural/community sensitivity: 25% (2021), 15% (2020)
- Influx of newcomers: 1% (2021), 1% (2020)
- Tourist safety an issue: 1% (2021), 1% (2020)
- Creates low paying jobs, no advancement: 1% (2021), 1% (2020)
- Tourism/tourists are given priority: 1% (2021), 1% (2020)
- Vacation rental issues: 0% (2021), 0% (2020)

Base: 2021 (191), 2020 (184)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Ways Residents can Support Tourism in Hawai‘i (2021 only)
(According to residents saying Hawai‘i tourism creates more benefits than problems)

Show the Aloha Spirit: Kind, Helpful, Respectful, Smiling 21%
Welcome them and understand their importance 13%
Educate tourists regarding land and people 9%
Play tourist / Support local business/events 7%
Work in the tourism industry 6%
Keep Hawaii clean / protect the environment 4%
Marketing Hawaii / Encourage others to visit 3%
Hawaii too dependent on tourism 2%
Allow more community input/involvement 2%
Set an example for tourists 1%
Support/Offer legal vacation rentals 1%
Ensure a safe/pleasurable experience 1%
Provide opportunities for tourism to give back to community 1%
Loosen COVID restrictions 1%
Tolerate / Let them be / Stay away from them 1%
Improve infrastructure 1%
No Favorable 1%
None 12%
Don’t Know 22%

Base: 1144
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?
Impact on You & Your Family

% saying Tourism has been “mostly positive” for you and your family
(Rating of 7-to-10 on 10 Point Scale)

Annual Visitor Arrivals

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?
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?
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?
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?

<table>
<thead>
<tr>
<th>Island</th>
<th>Top Box (9-10)</th>
<th>Mid-Range (6-8)</th>
<th>Bottom Tier (1-5)</th>
<th>No Impact</th>
<th>DK/Rf</th>
<th>Base</th>
<th>MEAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL 2020</td>
<td>15%</td>
<td>27%</td>
<td>37%</td>
<td>20%</td>
<td>1%</td>
<td>1709</td>
<td>6.11</td>
</tr>
<tr>
<td>OVERALL 2021</td>
<td>15%</td>
<td>26%</td>
<td>41%</td>
<td>14%</td>
<td>3%</td>
<td>1779</td>
<td>5.91</td>
</tr>
<tr>
<td>O'ahu 2020</td>
<td>14%</td>
<td>28%</td>
<td>37%</td>
<td>21%</td>
<td>2%</td>
<td>670</td>
<td>6.12</td>
</tr>
<tr>
<td>O'ahu 2021</td>
<td>15%</td>
<td>27%</td>
<td>41%</td>
<td>14%</td>
<td>3%</td>
<td>675</td>
<td>5.96</td>
</tr>
<tr>
<td>Hawai'i Island 2020</td>
<td>16%</td>
<td>27%</td>
<td>37%</td>
<td>18%</td>
<td>2%</td>
<td>460</td>
<td>6.02</td>
</tr>
<tr>
<td>Hawai'i Island 2021</td>
<td>16%</td>
<td>22%</td>
<td>43%</td>
<td>16%</td>
<td>3%</td>
<td>451</td>
<td>5.81</td>
</tr>
<tr>
<td>Maui County 2020</td>
<td>20%</td>
<td>26%</td>
<td>36%</td>
<td>17%</td>
<td>1%</td>
<td>378</td>
<td>6.33</td>
</tr>
<tr>
<td>Maui County 2021</td>
<td>16%</td>
<td>23%</td>
<td>41%</td>
<td>16%</td>
<td>3%</td>
<td>376</td>
<td>5.81</td>
</tr>
<tr>
<td>Kaua'i 2020</td>
<td>14%</td>
<td>26%</td>
<td>38%</td>
<td>16%</td>
<td>0%</td>
<td>201</td>
<td>5.83</td>
</tr>
<tr>
<td>Kaua'i 2021</td>
<td>15%</td>
<td>26%</td>
<td>45%</td>
<td>14%</td>
<td>1%</td>
<td>277</td>
<td>5.74</td>
</tr>
</tbody>
</table>

10=High
1=Low
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?
“Island is being run for tourists at the expense of local people”

% strongly/ somewhat agree island is being run for tourists at expense of local people (Rating of 6 to 10)

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

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.
On the geographic level, residents were particularly critical of tourism and its impact on the islands of O‘ahu – Wai‘anae and Windward - and Moloka‘i, and 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?

Q4. 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 the islands of Oʻahu – Waiʻanae and Windward - and Molokaʻi, and less so on Lānaʻi.

<table>
<thead>
<tr>
<th>Island/Area</th>
<th>% saying Tourism has been “mostly positive” for you and your family (Rating 7-10)</th>
<th>% strongly/somewhat agree Island is being run for tourists at expense of local people (Rating 6-10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</td>
<td>33% 34% 40% 34% 18% 24% 28% 41%</td>
<td>67% 67% 66% 65% 62% 72% 76% 67%</td>
</tr>
<tr>
<td>Oʻahu</td>
<td>30% 40% 29% 16%</td>
<td>68% 68% 70% 67%</td>
</tr>
<tr>
<td>Honolulu</td>
<td></td>
<td>69% 74% 64%</td>
</tr>
<tr>
<td>‘Ewa/Waiʻanae</td>
<td></td>
<td>69% 74% 59%</td>
</tr>
<tr>
<td>Windward</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>No. Shore</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Central</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Maui County</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>West Maui</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Central/ E. Maui</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Molokaʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Lānaʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Kauaʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>NE Kauaʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>SW Kauaʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>Hawaiʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>West Hawaiʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
<tr>
<td>East Hawaiʻi</td>
<td></td>
<td>62% 59% 67%</td>
</tr>
</tbody>
</table>

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?
Q8. Prior to doing this survey, were you aware of the existence of the Hawaiʻi Tourism Authority?
Awareness of Hawai‘i Tourism Authority Roles & Satisfaction with Roles
(i.e., satisfaction measured among residents aware that HTA is responsible for each area)

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………?

Responsibilities 2018 | Responsibilities 2021 | Rating 2018 | Rating 2021

Marketing & Leadership
- Promoting & Promoting HI tourism: 95% to 91%
- Leading HI tourism industry: 86% to 82%
- Enhancing HI tourism competitiveness: 81% to 73%

Sustainable Tourism, Cultural preservation
- Promoting sustainable tourism that balances economic well-being and resident quality of life: 58%
- Supporting and perpetuating Native Hawaiian culture, arts & places: 56%
- Proactively educating the visitor industry, visitors & residents to malama the islands/its traditions: 56%

Communications with Resident & Balancing Needs
- Communicating with HI residents concerning tourism: 48% to 55%
- Balancing resident/visitor natural resources needs: 48% to 54%