Resident Sentiment Survey Fall 2021 Highlights

Prepared for the:
State Department of Business, Economic Development & Tourism: Project #5792
January 2022

Fielded: November 8, 2021 through January 3, 2022
What’s the Big Idea?

1. **The Great Reset:** Awareness of HTA Tourism Management efforts is rising, setting the stage for results.

2. **The Current Setting:** Resident sentiment weakens slightly in Fall 2021, though residents say tourism is worth the issues associated with it.

3. **The Next Chapter:** As awareness of Managed Tourism efforts rise, they are gaining support and influence in improving resident sentiment.
The Great Reset: Awareness of HTA Tourism Management efforts is rising, setting the stage for results.
Hawai‘i Tourism Authority Aided Name Awareness holds steady

Q8. Prior to doing this survey, were you aware of the existence of the Hawai‘i Tourism Authority?
Resident awareness of HTA Tourism Management roles rise (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.......?
The Current Setting: Resident sentiment weakens slightly in Fall 2021, though residents say tourism is worth the issues associated with it.
“Tourism has brought more benefits than problems” continues downward

- Tourism recovery concerns?
- Longer-term issues beyond visitor volume?

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.
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?

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.
“This island is being run for tourists at the expense of local people” holds relatively steady

% 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...?
Tourism in Hawai‘i creates...
(According to residents saying Hawai‘i tourism creates more problems than benefits)

- Damage to the environment: 69%
- Overcrowding: 68%
- Traffic problems: 66%
- High prices/higher cost of living: 65%
- No respect for culture/tradition/‘āina: 49%
- Too dependent on tourism: 51%
- Health concerns, viruses: 49%
- Locals don’t benefit from tourism money: 35%
- Crime: 29%
- Influx of newcomers: 20%
- Tourism/tourists are given priority: 1%
- Vacation rental issues: 1%
- Loss of cultural/community sensitivity: 0%

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
However, residents still believe tourism is worth the issues associated with the industry ...

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Fall 2021 Resident Sentiment Survey Research Findings

Tourism is worth the issues associated with the industry

74%

Fall 2021 Resident Sentiment Focus Group Findings

“I think tourism is a necessary evil, but I wish that it was controlled more, especially at this time.” (Kaua‘i Resident)

“I’d prefer if we could have less of it, but without any kind of replacement for our economy, it kind of is what it is. (O‘ahu Resident)

“I think … tourism is the primary thing that’s required for people to financially stay viable, to stay alive.” (Kaua‘i Resident)

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?
The Next Chapter: As awareness of Managed Tourism efforts rise, they are gaining support and influence in improving resident sentiment.
Resident support for “volun-tourism” & halting additional legal vacation rentals inches upwards. Support for other strategies remain strong.

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?

<table>
<thead>
<tr>
<th>Regenerative</th>
<th>Accommodations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educate visitors and residents to malama the islands and each other</td>
<td>Eliminate illegal vacation rentals on my island</td>
</tr>
<tr>
<td>Encourage visitors to volunteer &amp; give back during their visits to Hawai‘i</td>
<td>Do not allow building of additional hotel/condo/timeshare units on my island</td>
</tr>
<tr>
<td>Stop approval of additional legal vacation rentals on my island</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Spring 2021</th>
<th>Fall 2021</th>
<th>Spring 2021</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educate visitors and residents</td>
<td>67%</td>
<td>68%</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Encourage visitors to volunteer &amp; give back during their visits to Hawai‘i</td>
<td>56%</td>
<td>56%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Eliminate illegal vacation rentals on my island</td>
<td>56%</td>
<td>39%</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Do not allow building of additional hotel/condo/timeshare units on my island</td>
<td>39%</td>
<td>39%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Stop approval of additional legal vacation rentals on my island</td>
<td>35%</td>
<td>36%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Mid-Range (6-8)**
- Educate visitors and residents: 21%
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 20%
- Eliminate illegal vacation rentals on my island: 20%
- Do not allow building of additional hotel/condo/timeshare units on my island: 20%
- Stop approval of additional legal vacation rentals on my island: 20%

**Bottom Tier (1-5)**
- Educate visitors and residents: 9%
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 10%
- Eliminate illegal vacation rentals on my island: 21%
- Do not allow building of additional hotel/condo/timeshare units on my island: 21%
- Stop approval of additional legal vacation rentals on my island: 21%

**DK**
- Educate visitors and residents: 3%
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 2%
- Eliminate illegal vacation rentals on my island: 3%
- Do not allow building of additional hotel/condo/timeshare units on my island: 3%
- Stop approval of additional legal vacation rentals on my island: 3%

**Base**
- Educate visitors and residents: 1,779
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 2007
- Eliminate illegal vacation rentals on my island: 1,779
- Do not allow building of additional hotel/condo/timeshare units on my island: 1,779
- Stop approval of additional legal vacation rentals on my island: 1,779

**MEAN**
- Educate visitors and residents: 8.75
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 8.76
- Eliminate illegal vacation rentals on my island: 7.08
- Do not allow building of additional hotel/condo/timeshare units on my island: 7.27
- Stop approval of additional legal vacation rentals on my island: 7.92

**Spring 2021**
- Educate visitors and residents: 67%
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 56%
- Eliminate illegal vacation rentals on my island: 56%
- Do not allow building of additional hotel/condo/timeshare units on my island: 39%
- Stop approval of additional legal vacation rentals on my island: 35%

**Fall 2021**
- Educate visitors and residents: 68%
- Encourage visitors to volunteer & give back during their visits to Hawai‘i: 56%
- Eliminate illegal vacation rentals on my island: 39%
- Do not allow building of additional hotel/condo/timeshare units on my island: 39%
- Stop approval of additional legal vacation rentals on my island: 36%
Resident support for visitor access fees inches upwards.

Access

<table>
<thead>
<tr>
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<th>Spring 2021</th>
<th>Fall 2021</th>
<th>Spring 2021</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge visitor access fees to state parks and trails</td>
<td>38%</td>
<td>44%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Designate resident-only days of the week at some state parks, beaches and trails</td>
<td>33%</td>
<td>28%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Mid-Range (6-8)</td>
<td>25%</td>
<td>25%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Bottom Tier (1-5)</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>DK</td>
<td>1,779</td>
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<td>1,779</td>
<td>2,007</td>
</tr>
<tr>
<td>Base</td>
<td>7.27</td>
<td>7.42</td>
<td>6.33</td>
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</tr>
<tr>
<td>MEAN</td>
<td></td>
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</table>

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?
Economic/Quality of Life Benefits + Managed Tourism = Resident Sentiment

Drivers of Resident Sentiment – Fall 2021

- Economic Impact & Quality of Life: 47%
- Managed Tourism & Sustainability: 30%
- Accommodations: 10%
- Negative Impacts: 8%
- Access: 4%
- Education: 1%

Supports local businesses
Creates shopping, restaurants
Creates well-paying jobs

Feel I have a voice in tourism development decisions
Helps preserve Native Hawaiian culture, language

Economy is too dependent on tourism
Stop adding legal vacation rentals
Eliminate illegal rentals

"Tourism has brought more benefits than problems"
Managed Tourism & Sustainability Rise in Importance

Drivers of Resident Sentiment: Spring vs. Fall 2021

<table>
<thead>
<tr>
<th>Category</th>
<th>Spring 2021</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Benefits &amp; Quality of Life</td>
<td>56%</td>
<td>47%</td>
</tr>
<tr>
<td>Managed Tourism &amp; Sustainability</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Accommodations</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Negative Impacts</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Access</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Education, 1%</td>
<td></td>
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</tr>
</tbody>
</table>
Mahalo from the Omnitrak Group
Appendices

Background Information
Tourism Management Ratings
Overview of Fall 2021 Indicators
Is Tourism Worth the Issues?
Problems Created by Tourism
Appendix A: Background Information: Research Objectives, Sample Plan & Methodology
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 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 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
Appendix B: Resident Ratings of Tourism Management Efforts & Strategies
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – By Island

<table>
<thead>
<tr>
<th></th>
<th>10=High</th>
<th>1=Low</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>2</td>
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<tr>
<td></td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>8</td>
<td>10</td>
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</table>

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

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

<table>
<thead>
<tr>
<th>Visitor Industry</th>
<th>Age</th>
<th>Income</th>
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</thead>
<tbody>
<tr>
<td>Visitor Industry HH</td>
<td>18-34</td>
<td>35-54</td>
</tr>
<tr>
<td>Top Box (9-10)</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Mid-Range (6-8)</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Bottom Tier (1-5)</td>
<td>48%</td>
<td>53%</td>
</tr>
<tr>
<td>DK</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Base</td>
<td>1062</td>
<td>937</td>
</tr>
<tr>
<td>MEAN</td>
<td>5.4</td>
<td>5.3</td>
</tr>
</tbody>
</table>

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
“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.
“I feel like tourism is being better managed on my island” - By Area

(Continued)
"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.
Regenerative: “Educate visitors and residents to mālama the islands and each other” – By Island

Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not important at All, how important is it that the state [INSERT] to help better manage tourism?
Regenerative: “Encourage visitors to volunteer and give back during their visits to Hawai‘i” – By Island

<table>
<thead>
<tr>
<th></th>
<th>OVERALL 2021 Spring</th>
<th>OVERALL 2021 Fall</th>
<th>O‘ahu 2021 Spring</th>
<th>O‘ahu 2021 Fall</th>
<th>Hawai‘i Island 2021 Spring</th>
<th>Hawai‘i Island 2021 Fall</th>
<th>Maui County 2021 Spring</th>
<th>Maui County 2021 Fall</th>
<th>Kaua‘i 2021 Spring</th>
<th>Kaua‘i 2021 Fall</th>
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<tbody>
<tr>
<td>Top Box (9-10)</td>
<td>37%</td>
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<td>35%</td>
<td>36%</td>
<td>38%</td>
<td>41%</td>
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<td>Mid-Range (6-8)</td>
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<td>Bottom Tier (1-5)</td>
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<tr>
<td>DK/Rf</td>
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<tr>
<td>Base</td>
<td>1779</td>
<td>2007</td>
<td>675</td>
<td>853</td>
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<td>458</td>
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Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?
Accommodations: “Eliminate illegal vacation rentals on my island” – By Island

Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?
Accommodations: “Stop approval of additional legal vacation rentals on my island” – By Island

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

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<th>Maui County 2021 Fall</th>
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<th>Kaua‘i 2021 Fall</th>
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<tbody>
<tr>
<td>Top Box (9-10)</td>
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<td>36%</td>
<td>35%</td>
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<td>31%</td>
<td>36%</td>
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<td>42%</td>
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<td>55%</td>
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<td>Mid-Range (6-8)</td>
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<td>Bottom Tier (1-5)</td>
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<td>DK/Rf</td>
<td>6%</td>
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<tr>
<td>MEAN</td>
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<td>6.9</td>
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<td>7.2</td>
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</table>
Accommodations: “Do not allow building of additional hotel/condo/timeshare units on my island” – *By Island*

<table>
<thead>
<tr>
<th></th>
<th>OVERALL 2021 Spring</th>
<th>OVERALL 2021 Fall</th>
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<th>O'ahu 2021 Fall</th>
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<td>60%</td>
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<td>Bottom Tier (1-5)</td>
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<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>DK/Rf</td>
<td>3%</td>
<td>4%</td>
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<td>1%</td>
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<td>0%</td>
<td>2%</td>
</tr>
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<td>Base</td>
<td>1779</td>
<td>2007</td>
<td>675</td>
<td>853</td>
<td>451</td>
<td>458</td>
<td>376</td>
<td>419</td>
<td>277</td>
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<tr>
<td>MEAN</td>
<td>7.1</td>
<td>7.1</td>
<td>7.0</td>
<td>7.0</td>
<td>6.7</td>
<td>6.9</td>
<td>7.9</td>
<td>7.8</td>
<td>7.7</td>
<td>8.1</td>
</tr>
</tbody>
</table>

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

### Access: “Charge visitor access fees to state parks and trails” – By Island

<table>
<thead>
<tr>
<th></th>
<th>OVERALL 2021 Spring</th>
<th>OVERALL 2021 Fall</th>
<th>O‘ahu 2021 Spring</th>
<th>O‘ahu 2021 Fall</th>
<th>Hawai‘i Island 2021 Spring</th>
<th>Hawai‘i Island 2021 Fall</th>
<th>Maui County 2021 Spring</th>
<th>Maui County 2021 Fall</th>
<th>Kaua‘i 2021 Spring</th>
<th>Kaua‘i 2021 Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Box (9-10)</td>
<td>38%</td>
<td>44%</td>
<td>36%</td>
<td>41%</td>
<td>40%</td>
<td>45%</td>
<td>48%</td>
<td>52%</td>
<td>47%</td>
<td>54%</td>
</tr>
<tr>
<td>Mid-Range (6-8)</td>
<td>33%</td>
<td>28%</td>
<td>35%</td>
<td>29%</td>
<td>31%</td>
<td>27%</td>
<td>26%</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Bottom Tier (1-5)</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
<td>24%</td>
<td>20%</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>DK/Rf</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Base</td>
<td>1779</td>
<td>2007</td>
<td>675</td>
<td>853</td>
<td>451</td>
<td>458</td>
<td>376</td>
<td>419</td>
<td>277</td>
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</tr>
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<td>7.4</td>
<td>7.2</td>
<td>7.3</td>
<td>7.3</td>
<td>7.4</td>
<td>7.6</td>
<td>8.0</td>
<td>7.6</td>
<td>8.0</td>
</tr>
</tbody>
</table>

10=High
1=Low
Access: “Designate resident-only days of the week at some state parks, beaches and trails” – By Island

Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?
Appendix C:
Overview of Fall 2021
Resident Sentiment Indicators
High Level Indicators of Resident Sentiment

Perception of tourism industry in Hawai‘i - Favorability

- Top Box (9-10): Spring 2021 23%, Fall 2021 22%
- Mid-Range (6-8): Spring 2021 44%, Fall 2021 40%
- Bottom Tier (1-5): Spring 2021 31%, Fall 2021 35%
- No Impact: Spring 2021 0%, Fall 2021 0%
- DK/Rf: Spring 2021 2%, Fall 2021 2%
- Base: 1,779
- MEAN: 6.6

Perceived impact of tourism on the State

- Top Box (9-10): Spring 2021 25%, Fall 2021 24%
- Mid-Range (6-8): Spring 2021 38%, Fall 2021 38%
- Bottom Tier (1-5): Spring 2021 34%, Fall 2021 36%
- No Impact: Spring 2021 1%, Fall 2021 1%
- DK/Rf: Spring 2021 2%, Fall 2021 2%
- Base: 1,779
- MEAN: 6.0

Perceived Impact of tourism on You and Your Family

- Top Box (9-10): Spring 2021 15%, Fall 2021 16%
- Mid-Range (6-8): Spring 2021 26%, Fall 2021 29%
- Bottom Tier (1-5): Spring 2021 41%, Fall 2021 39%
- No Impact: Spring 2021 14%, Fall 2021 13%
- DK/Rf: Spring 2021 3%, Fall 2021 2%
- Base: 1,779
- MEAN: 5.9

Tourism has brought more benefits than problems

- Top Box (9-10): Spring 2021 17%, Fall 2021 16%
- Mid-Range (6-8): Spring 2021 36%, Fall 2021 33%
- Bottom Tier (1-5): Spring 2021 44%, Fall 2021 48%
- No Impact: Spring 2021 0%, Fall 2021 0%
- DK/Rf: Spring 2021 3%, Fall 2021 3%
- Base: 1,779
- MEAN: 5.7

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.
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?
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?
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 Indicators

Economic Impact

Tourism should be actively encouraged on my island
Tourism reminds me we have a unique culture to share
Enhances residents’ quality of life

Quality of Life

Creates shopping, restaurants & entertainment opportunities
Sponsors festivals, activities & sports events for residents and visitors

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 – Natural Resources and Cultural Sustainability Indicators

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.
Negative Impact Indicators

Island is run for tourists at expense of local people

Island economy is too dependent on tourism

<table>
<thead>
<tr>
<th></th>
<th>Spring 2021</th>
<th>Fall 2021</th>
<th>Spring 2021</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top Box (9-10)</strong></td>
<td>29%</td>
<td>33%</td>
<td>49%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>Mid-Range (6-8)</strong></td>
<td>37%</td>
<td>35%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Bottom Tier (1-5)</strong></td>
<td>30%</td>
<td>29%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>DK</strong></td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Base</strong></td>
<td>1,779</td>
<td>2,007</td>
<td>1,779</td>
<td>2,007</td>
</tr>
<tr>
<td><strong>MEAN</strong></td>
<td>6.8</td>
<td>7.0</td>
<td>8.0</td>
<td>7.9</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.
“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...?
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.

<table>
<thead>
<tr>
<th>Local Area</th>
<th>Tourism is worth the issues associated with it (% Yes)</th>
<th>% strongly/ somewhat agree tourism has brought more benefits than problems (Rating 6-10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83% 73% 72% 73% 74% 77% 71%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74% 45% 44% 46% 49% 54% 45%</td>
</tr>
<tr>
<td>O’ahu</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Honolulu</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>‘Ewa/Leeward</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Windward</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>No. Shore</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Central</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Maui County</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>West Maui</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Central/ E. Maui</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Moloka’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Lāna’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Kaua’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>NE Kaua’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>SW Kaua’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>Hawai’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>West Hawai’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
<tr>
<td>East Hawai’i</td>
<td>74% 75% 77% 73% 68% 77% 70% 75% 73% 75% 72% 76% 83%</td>
<td>49% 50% 54% 52% 38% 37% 39% 52% 45% 42% 44% 50% 74%</td>
</tr>
</tbody>
</table>

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 Moloka‘i and less so on Lāna‘i. Only 25 percent of Moloka‘i residents say the industry is ‘mostly positive’ for themselves and their family.

### Tourism Impact

<table>
<thead>
<tr>
<th>Island/Area</th>
<th>% saying “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></td>
<td></td>
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<tr>
<td>O‘ahu</td>
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<td>Honolulu</td>
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</tr>
<tr>
<td>‘Ewa/Wai‘anae</td>
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<td>Leeward</td>
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<td>Windward</td>
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<td>No. Shore</td>
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</tr>
<tr>
<td>Central</td>
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<td>Maui County</td>
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<tr>
<td>West Maui</td>
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<td></td>
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<tr>
<td>Central/E. Maui</td>
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</tr>
<tr>
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<td>Hawai‘i</td>
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<td></td>
</tr>
<tr>
<td>West Hawai‘i</td>
<td></td>
<td></td>
</tr>
<tr>
<td>East Hawai‘i</td>
<td></td>
<td></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/Your and Your Family?
Appendix D:
Is Tourism Worth the Issues Associated with 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?
“Do you think tourism is worth the issues associated with the industry?” – By Demographics

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

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 Area (Continued)

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?
Appendix E:
Problems Created by Tourism
Problems Created by Tourism in Hawai‘i (Fall 2021 only)
(According to residents saying Hawai‘i tourism creates more problems than benefits)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damage to the Environment (Net)</td>
<td>69%</td>
</tr>
<tr>
<td>Overcrowding (Net)</td>
<td>68%</td>
</tr>
<tr>
<td>Traffic Problems</td>
<td>67%</td>
</tr>
<tr>
<td>High Prices/Higher Cost of Living (Net)</td>
<td>65%</td>
</tr>
<tr>
<td>No Respect for Culture/Tradition/Āina</td>
<td>62%</td>
</tr>
<tr>
<td>Too Dependent on Tourism</td>
<td>58%</td>
</tr>
<tr>
<td>Health Concerns, Viruses, Potential for Epidemics</td>
<td>51%</td>
</tr>
<tr>
<td>Locals Don’t Benefit from Tourism Money</td>
<td>35%</td>
</tr>
<tr>
<td>Crime (Net)</td>
<td>23%</td>
</tr>
<tr>
<td>Influx of Newcomers Including Foreign Investors</td>
<td>1%</td>
</tr>
<tr>
<td>Tourism/Tourists Are Given Priority</td>
<td>1%</td>
</tr>
<tr>
<td>Vacation Rental Issues</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Refused</td>
<td>1%</td>
</tr>
</tbody>
</table>

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)

- Damage to the Environment: Fall 2021 (69%), Spring 2021 (60%)
- Overcrowding: Fall 2021 (68%), Spring 2021 (66%)
- Traffic Problems: Fall 2021 (67%), Spring 2021 (63%)
- High Prices/Higher Cost of Living: Fall 2021 (65%), Spring 2021 (65%)
- No Respect for Culture/Tradition/‘Āina: Fall 2021 (62%), Spring 2021 (49%)
- Too Dependent on Tourism: Fall 2021 (58%), Spring 2021 (51%)
- Health Concerns, Viruses: Fall 2021 (51%), Spring 2021 (51%)
- Locals Don’t Benefit from Tourism Money: Fall 2021 (35%), Spring 2021 (29%)
- Crime: Fall 2021 (23%), Spring 2021 (20%)
- Influx of Newcomers: Fall 2021 (1%), Spring 2021 (1%)
- Tourism/Tourists are Given Priority: Fall 2021 (1%), Spring 2021 (1%)
- Vacation Rental Issues: Fall 2021 (0%), Spring 2021 (0%)
- Loss of Cultural/Community Sensitivity: Fall 2021 (2%), Spring 2021 (0%)

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

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% (Fall 2021), 71% (Spring 2021)
- Damage to the Environment: 63% (Fall 2021), 69% (Spring 2021)
- High Prices/Higher Cost of Living: 69% (Fall 2021), 69% (Spring 2021)
- No Respect for Culture/Tradition/Āina: 67% (Fall 2021), 69% (Spring 2021)
- Too Dependent on Tourism: 58% (Fall 2021), 72% (Spring 2021)
- Traffic Problems: 66% (Fall 2021), 66% (Spring 2021)
- Health Concerns, Potential for Epidemics: 52% (Fall 2021), 55% (Spring 2021)
- Locals Don’t Benefit from Tourism Money: 39% (Fall 2021), 33% (Spring 2021)
- Crime: 28% (Fall 2021), 24% (Spring 2021)
- Vacation Rental Issues: 1% (Fall 2021), 1% (Spring 2021)
- Tourist Safety an Issue: <1% (Fall 2021), 0% (Spring 2021)
- Creates Low Paying Jobs, No Advancement: <1% (Fall 2021), 0% (Spring 2021)
- Influx of Newcomers: <1% (Fall 2021), 0% (Spring 2021)
- Tourism/Tourists Are Given Priority: <1% (Fall 2021), <1% (Spring 2021)
- Loss of Cultural/Community Sensitivity: 1% (Fall 2021), 1% (Spring 2021)

Base: Fall 2021 (400), Spring 2021 (283)
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)

Base: Fall 2021 (216), Spring 2021 (195)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?

- Damage to the Environment: 69%
- Traffic Problems: 67%
- Overcrowding: 67%
- High Prices/Higher Cost of Living: 70%
- No Respect for Culture/Tradition/Āina: 62%
- Health Concerns, Potential for Epidemics: 47%
- Too Dependent on Tourism: 43%
- Locals Don’t Benefit from Tourism Money: 42%
- Crime: 24%
- Influx of Newcomers: 15%
- Tourism/Tourists Are Given Priority: <1%
- Vacation Rental Issues: <1%
- Creates Low Paying Jobs, No Advancement: 2%
- Loss of Cultural/Community Sensitivity: 2%
- Tourist Safety an Issue: 1%
Problems Created by Tourism in Hawai’i: Kaua’i Residents
(According to residents saying Hawai’i tourism creates more problems than benefits)

- Traffic Problems: 72%
- Overcrowding: 70%
- Damage to the Environment: 53%
- High Prices/Higher Cost of Living: 52%
- Health Concerns, Potential for Epidemics: 43%
- No Respect for Culture/Tradition/Āina: 37%
- Too Dependent on Tourism: 37%
- Locals Don’t Benefit from Tourism Money: 33%
- Crime: 20%
- Tourism/Tourists Are Given Priority: 13%
- Influx of Newcomers: 13%
- Vacation Rental Issues: 13%
- Tourist Safety an Issue: 13%
- Creates Low Paying Jobs, No Advancement: 13%
- Loss of Cultural/Community Sensitivity: 13%

Base: Fall 2021 (148), Spring 2021 (139)
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)

**Base: Fall 2021 (209), Spring 2021 (191)**

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)

- Show the Aloha Spirit: Kind, Helpful, Respectful, Smiling
- Welcome them and understand their importance
- Educate tourists regarding land and people
- Play tourist / Support local business/events
- Marketing Hawaii / Encourage others to visit
- Keep Hawaii clean / protect the environment
- Work in the tourism industry
- Manage/Control/Cap tourism
- Allow more community input/involvement
- Have government support tourism
- Discounts/lower taxes for tourism businesses
- Ensure a safe/pleasurable experience
- Hawaii too dependent on tourism
- Improve infrastructure
- Loosen COVID restrictions
- Provide opportunities to give back to community
- Support/Offer legal vacation rentals
- Set an example for tourists
- Tolerate / Let them be / Stay away from them
- No Favorable
- None
- Don't Know

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?