Resident Sentiment Survey Spring 2022 Highlights

Prepared for the:
State Department of Business, Economic Development & Tourism: Project #5808
August 2022

Fielded: May 7 through July 30, 2022
**What’s the Big Idea?**

Fall 2021 Resident Sentiment Recap

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

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

**The Next Chapter:** As awareness of tourism management efforts rises, they are gaining support and influence in improving resident sentiment.
What’s the **Big Idea?**

1. **The Great Reset Begins:** Early signs of strengthening resident sentiment are appearing.

2. **The Current Setting:** Residents who are aware of tourism management efforts are generally more positive towards Hawai‘i tourism, though awareness of such efforts is relatively low.

3. **The Next Chapter:** To fuel further improvement in resident sentiment, continue to implement/build awareness of tourism management efforts, along with the economic/quality of life benefits of tourism.
The Great Reset: Early signs of strengthening resident sentiment are appearing
High-level Resident Sentiment indicators show improvement on Hawaii's tourism industry, perception of tourism's impact on the State, and perceived impact of tourism on residents and their families. The data shows an overall positive trend from Fall 2021 to Spring 2022, with a slight increase in favorability and perceived positive impact.

**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 Hawaii.

**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.
Tourism has brought more benefits than problems” strengthens
U.S. Nationwide Community Sentiment

83% Possess a favorable view of tourism in their community, though...

61% Say tourism contributes to increased cost of living in their community, yet...

75% Say the benefits of tourism outweigh the negatives.

Source: Omnitrac Community Sentiment Survey of 13,143 U.S. adults (ages 18+) nationwide, Spring 2022.
Top opportunities for destination management in Hawai‘i hold steady
(According to residents saying Hawai‘i tourism creates more problems than benefits)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overcrowding</td>
<td>69%</td>
<td>68%</td>
</tr>
<tr>
<td>Damage to the environment</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>High prices/higher cost of living</td>
<td>65%</td>
<td>67%</td>
</tr>
<tr>
<td>Traffic problems</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>No respect for culture/tradition/‘āina</td>
<td>62%</td>
<td>67%</td>
</tr>
<tr>
<td>Too dependent on tourism/should diversify</td>
<td>54%</td>
<td>58%</td>
</tr>
<tr>
<td>Health concerns, viruses, potential for epidemics</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Locals don't benefit from tourism money</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Crime</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Loss of cultural/community sensitivity</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Tourism/Tourists are given priority</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: Spring 2022 (856), Fall 2021 (973)

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
“Impact of Tourism on You & Your Family” holds steady

% saying Tourism has been “mostly positive” for 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.

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?

58% in Yr 1999
56% in Yr 2001
50% in Yr 2002
42% in Yr 2005
44% in Yr 2006
42% in Yr 2007
41% in Yr 2009
41% in Yr 2010
44% in Yr 2012
45% in Yr 2014
40% in Yr 2015
41% in Yr 2017
43% in Yr 2018
49% in Yr 2019
41% in Yr 2020
34% in Yr 2021
33% in Yr 2021
36% in Yr 2022
36% in Yr 2022

Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring  Fall  Spring
“This island is being run for tourists at the expense of local people” holds 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. 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...?
Balance: Negative Impacts/Tourism Management Indicators

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

**Tourism Management**
- More effort is being made to balance economic benefits of tourism and quality of life for residents
- Tourism is being better managed on my island
- I have a voice in my island’s tourism development decisions

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.
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.
Tourism Mostly Positive for Family/Island Run for Tourists by Island/Area

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

- Statewide: 36%
- O‘ahu: 36%
- Honolulu: 39%
- ‘Ewa/ Wai‘anae: 37%
- Windward: 31%
- No. Shore: 32%
- Central: 31%
- West O‘ahu: 32%
- Leeward: 32%

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

- Statewide: 67%
- O‘ahu: 66%
- Honolulu: 60%
- ‘Ewa/ Wai‘anae: 71%
- Windward: 69%
- No. Shore: 67%
- Central: 73%
- West O‘ahu: 70%

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?
The Current Setting: Residents who are aware of tourism management efforts are generally more positive towards tourism, but awareness is low.
Awareness of Tourism Management and DMAPs runs low, but improves Resident Sentiment

Q9. Have you ever heard of “Destination Management” or “Managed Tourism?”
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?
Destination Management Action Plans Awareness: O‘ahu

Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state? (Base: 838)

Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 195)
Destination Management Action Plans Awareness: Maui

% Aware of HTA Destination Management Action Plans

Implement a responsible tourism marketing communications program to educate visitors pre- and post-arrival about safe and respectful travel. 68%

Continue to offer cultural education and training programs to enhance and perpetuate aloha, mālama and kuleana, and the authentic Hawai‘i experience. 62%

Develop Regenerative Tourism initiatives. 54%

Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawaii Tourism Authority’s efforts to better manage tourism in our state? (Base: 403)

Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for INSERT ISLAND. Are you aware that the HTA is working to: (Base: 95)
Q10. Have you heard of Hawai'i’s “Destination Management Action Plans (DMAP),” which are the Hawaii Tourism Authority’s efforts to better manage tourism in our state? (Base: 403)

Q10a. I’m going to read you a brief list of actions included in the Hawai'i Tourism Authority’s Destination Management Action Plan for INSERT ISLAND. Are you aware that the HTA is working to: (Base: 95)
Destination Management Action Plans Awareness: Hawai‘i Island

% Aware of HTA Destination Management Action Plans

- Protect and preserve culturally significant places and hotspots. 85%
- Develop resources and educational programs to perpetuate authentic Hawaiian culture and ‘Ōlelo Hawai‘i. 82%
- Implement a comprehensive communications and education plan that facilitates positive community-visitor relations and pono practices, including the Pono Pledge. 76%

...and among those aware of DMAP:

Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawaii Tourism Authority’s efforts to better manage tourism in our state? (Base: 403)

Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 95)
Support for Regenerative & Accommodations tourism management strategies remains strong

![Bar Chart]

**Regenerative**
- Educate visitors and residents to mālama the islands and each other
- Encourage visitors to volunteer & give back during their visits to Hawai‘i
- Eliminate illegal vacation rentals on my island

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

<table>
<thead>
<tr>
<th></th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
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<tbody>
<tr>
<td>Top Box (9-10)</td>
<td>68%</td>
<td>72%</td>
<td>39%</td>
<td>40%</td>
<td>56%</td>
<td>57%</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>Mid-Range (6-8)</td>
<td>20%</td>
<td>19%</td>
<td>32%</td>
<td>30%</td>
<td>22%</td>
<td>20%</td>
<td>27%</td>
<td>25%</td>
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<tr>
<td>Bottom Tier (1-5)</td>
<td>10%</td>
<td>8%</td>
<td>26%</td>
<td>25%</td>
<td>19%</td>
<td>19%</td>
<td>30%</td>
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<tr>
<td>DK</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>MEAN</td>
<td>8.76</td>
<td>8.85</td>
<td>7.27</td>
<td>7.28</td>
<td>7.96</td>
<td>8.00</td>
<td>7.11</td>
<td>7.16</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 _______ to help better manage tourism?
....as does support for visitor/resident access tourism management 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?
Native Hawaiian Cultural & Sustainability Indicators

<table>
<thead>
<tr>
<th>Statement</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentic presentation of Native Hawaiian language and culture is important (Revised Indicator)</td>
<td>61%</td>
<td>15%</td>
<td>15%</td>
<td>21%</td>
<td>21%</td>
<td>74%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism contributes to the perpetuation of Native Hawaiian culture and language (Revised Indicator)</td>
<td>26%</td>
<td>28%</td>
<td>35%</td>
<td>38%</td>
<td>35%</td>
<td>18%</td>
<td></td>
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</tr>
<tr>
<td>Tourism helps fund the stewardship of Hawai'i's natural resources, parks and cultural sites (Revised Indicator)</td>
<td>12%</td>
<td>53%</td>
<td>38%</td>
<td>8%</td>
<td></td>
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<tr>
<td>Visitors need to be educated about protecting Hawai'i’s natural environment and cultural resources. (New)</td>
<td>61%</td>
<td>15%</td>
<td>21%</td>
<td>74%</td>
<td>21%</td>
<td>74%</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.
Residents express strong support for using tax dollars to *Manage* tourism, less so to *Encourage* Tourism.

Tax dollars should be spent to **MANAGE** the impacts of tourism in my community

Tax dollars should be spent to **ENCOURAGE** tourism in my community

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Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]
The Next Chapter: To fuel further improvement in resident sentiment, continue to build tourism management efforts, and economic/quality of life benefits of tourism.
Drivers of Resident Sentiment – Spring 2022

- Economic Impact & Quality of Life: 53%
- Tourism Management & Sustainability: 25%
- Negative Impacts: 9%
- Accommodations & Access Fees: 8%
- Education: 3%
- Giving back & resident access: 2%

"Tourism has brought more benefits than problems"

Economic, Quality of Life + Tourism Management: 78%
Resident sentiment drivers holding steady

Drivers of Resident Sentiment: Spring 2021 to Fall 2022

- Economic Benefits & Quality of Life
- Tourism Management & Sustainability
- Accommodations
- Negative Impacts
- Access
- Education

- Fall 2021:
  - Economic Benefits & Quality of Life: 47%
  - Tourism Management & Sustainability: 30%
  - Accommodations: 10%
  - Negative Impacts: 8%
  - Access: 8%
  - Education: 4%

- Spring 2022:
  - Economic Benefits & Quality of Life: 53%
  - Tourism Management & Sustainability: 25%
  - Accommodations: 8%
  - Negative Impacts: 9%
  - Access: 3%
  - Education: 2%

- Fall 2019:
  - Economic Benefits & Quality of Life: 42%
  - Tourism Management & Sustainability: 16%
  - Accommodations: 10%
  - Negative Impacts: 78%
  - Access: 26
  - Education: 0
Mahalo from the Omnitrak Group
Appendices

Background Information
Tourism Management Ratings
Overview of Spring 2022 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 19 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 = 1955 respondents as follows:
- O‘ahu: 839
- Hawai‘i Island: 458
- Maui County: 403
- Kaua‘i: 255

Methodology
- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 33%) and online surveys (67%).
- All calls were placed from Omnitrak’s continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: May 7 through July 30, 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

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

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

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

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

- By O‘ahu Area

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

- By Neighbor Island Area

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

Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.
**Regenerative: “Educate visitors and residents to mālama the islands and each other” – By Island**

<table>
<thead>
<tr>
<th></th>
<th>OVERALL 2021 Fall</th>
<th>OVERALL 2022 Spring</th>
<th>O'ahu 2021 Fall</th>
<th>O'ahu 2022 Spring</th>
<th>Hawai'i Island 2021 Fall</th>
<th>Hawai'i Island 2022 Spring</th>
<th>Maui County 2021 Fall</th>
<th>Maui County 2022 Spring</th>
<th>Kaua'i 2021 Fall</th>
<th>Kaua'i 2022 Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Box (9-10)</td>
<td>68%</td>
<td>72%</td>
<td>66%</td>
<td>70%</td>
<td>71%</td>
<td>74%</td>
<td>75%</td>
<td>74%</td>
<td>78%</td>
<td>78%</td>
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<tr>
<td>Mid-Range (6-8)</td>
<td>20%</td>
<td>19%</td>
<td>22%</td>
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<td>16%</td>
<td>13%</td>
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<td>Bottom Tier (1-5)</td>
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<td>10%</td>
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<td>7%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
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<tr>
<td>DK/Rf</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
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<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Base</td>
<td>2007</td>
<td>1955</td>
<td>853</td>
<td>839</td>
<td>458</td>
<td>458</td>
<td>419</td>
<td>403</td>
<td>277</td>
<td>255</td>
</tr>
<tr>
<td><strong>MEAN</strong></td>
<td><strong>8.8</strong></td>
<td><strong>8.8</strong></td>
<td><strong>8.7</strong></td>
<td><strong>8.8</strong></td>
<td><strong>8.9</strong></td>
<td><strong>9.0</strong></td>
<td><strong>9.0</strong></td>
<td><strong>9.1</strong></td>
<td><strong>9.2</strong></td>
<td><strong>9.3</strong></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?
Regenerative: “Encourage visitors to volunteer and give back during their visits to Hawai‘i” – *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: “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?
Accommodations: “Do not allow building of additional hotel/condo/timeshare units 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?
Access: “Charge visitor access fees to state parks and trails” – By Island

<table>
<thead>
<tr>
<th>Island</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>O'ahu</td>
<td>43%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>45%</td>
<td>44%</td>
<td>52%</td>
<td>50%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Hawai'i Island</td>
<td>29%</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
<td>27%</td>
<td>31%</td>
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<td>22%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Kaua'i</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
<td>27%</td>
<td>25%</td>
<td>26%</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Percentage Distribution</th>
<th>Top Box (9-10)</th>
<th>Mid-Range (6-8)</th>
<th>Bottom Tier (1-5)</th>
<th>DK/Rf</th>
<th>Base</th>
<th>MEAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021 Fall</td>
<td>44%</td>
<td>28%</td>
<td>25%</td>
<td>3%</td>
<td>2007</td>
<td>7.4</td>
</tr>
<tr>
<td>2022 Spring</td>
<td>43%</td>
<td>30%</td>
<td>24%</td>
<td>3%</td>
<td>1955</td>
<td>7.4</td>
</tr>
<tr>
<td>OVERALL</td>
<td>43%</td>
<td>29%</td>
<td>26%</td>
<td>3%</td>
<td>853</td>
<td>7.3</td>
</tr>
<tr>
<td>O'ahu 2021 Fall</td>
<td>41%</td>
<td>30%</td>
<td>26%</td>
<td>2%</td>
<td>839</td>
<td>7.2</td>
</tr>
<tr>
<td>2021 Fall</td>
<td>41%</td>
<td>29%</td>
<td>26%</td>
<td>2%</td>
<td>458</td>
<td>7.4</td>
</tr>
<tr>
<td>O'ahu 2022 Spring</td>
<td>45%</td>
<td>44%</td>
<td>23%</td>
<td>3%</td>
<td>458</td>
<td>8.0</td>
</tr>
<tr>
<td>Hawai'i Island 2021 Fall</td>
<td>44%</td>
<td>41%</td>
<td>23%</td>
<td>3%</td>
<td>441</td>
<td>7.4</td>
</tr>
<tr>
<td>2021 Fall</td>
<td>52%</td>
<td>50%</td>
<td>22%</td>
<td>3%</td>
<td>408</td>
<td>8.0</td>
</tr>
<tr>
<td>Hawai'i Island 2022 Spring</td>
<td>26%</td>
<td>27%</td>
<td>23%</td>
<td>3%</td>
<td>403</td>
<td>8.0</td>
</tr>
<tr>
<td>Maui County 2021 Fall</td>
<td>54%</td>
<td>50%</td>
<td>19%</td>
<td>3%</td>
<td>277</td>
<td>7.9</td>
</tr>
<tr>
<td>2022 Spring</td>
<td>54%</td>
<td>25%</td>
<td>19%</td>
<td>3%</td>
<td>255</td>
<td>7.9</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?
Appendix C: Overview of Spring 2022 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?

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

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

**Quality of Life**
- Enhances residents' quality of life
- Creates shopping, dining & entertainment opportunities
- Sponsors festivals, activities & sports events for residents and visitors

---

<table>
<thead>
<tr>
<th></th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Box (9-10)</td>
<td>21%</td>
<td>24%</td>
<td>32%</td>
<td>39%</td>
<td>15%</td>
<td>15%</td>
<td>29%</td>
<td>31%</td>
</tr>
<tr>
<td>Mid-Range (6-8)</td>
<td>31%</td>
<td>32%</td>
<td>37%</td>
<td>33%</td>
<td>29%</td>
<td>34%</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>Bottom Tier (1-5)</td>
<td>46%</td>
<td>42%</td>
<td>29%</td>
<td>27%</td>
<td>54%</td>
<td>49%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>DK</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>MEAN</td>
<td>5.87</td>
<td>6.10</td>
<td>6.92</td>
<td>7.18</td>
<td>5.28</td>
<td>5.43</td>
<td>6.71</td>
<td>6.72</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.
Native Hawaiian Cultural and 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.
Balance: Negative Impacts and Tourism Management Indicators

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

**Tourism Management**
- More effort is being made to balance economic benefits of tourism and quality of life for residents
- Tourism is being better managed on my island
- I have a voice in my island’s tourism development decisions

---

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...?
Appendix D:
Is Tourism Worth the Issues Associated with it?
"Do you think tourism is worth the issues associated with the industry?" – *By Island*

<table>
<thead>
<tr>
<th>Island</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
<th>2021 Fall</th>
<th>2022 Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL</td>
<td>74%</td>
<td>75%</td>
<td>75%</td>
<td>77%</td>
<td>77%</td>
<td>73%</td>
<td>60%</td>
<td>73%</td>
<td>66%</td>
<td></td>
</tr>
<tr>
<td>O'ahu</td>
<td>851</td>
<td>839</td>
<td>456</td>
<td>455</td>
<td>418</td>
<td>403</td>
<td>277</td>
<td>255</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hawai'i Island</td>
<td>77%</td>
<td>74%</td>
<td>455</td>
<td>455</td>
<td>418</td>
<td>403</td>
<td>277</td>
<td>255</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maui County</td>
<td>60%</td>
<td>73%</td>
<td>403</td>
<td>277</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maui County</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kaua'i</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Visitor Industry</th>
<th>Age</th>
<th>Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor Industry HH</td>
<td>18-34</td>
<td>68%</td>
</tr>
<tr>
<td>Non-Visitor Industry HH</td>
<td>35-54</td>
<td>74%</td>
</tr>
<tr>
<td>55-64</td>
<td>75%</td>
<td>$100K+</td>
</tr>
<tr>
<td>65+</td>
<td>82%</td>
<td>&lt;$75K</td>
</tr>
<tr>
<td>Base</td>
<td>1027</td>
<td>925</td>
</tr>
</tbody>
</table>

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 Neighbor Island Area*

<table>
<thead>
<tr>
<th>Region</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Hawai‘i Island</td>
<td>71%</td>
<td>80%</td>
</tr>
<tr>
<td>West Hawai‘i Island</td>
<td>75%</td>
<td>77%</td>
</tr>
<tr>
<td>West Maui</td>
<td>58%</td>
<td>72%</td>
</tr>
<tr>
<td>Central / East Maui</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Molokai</td>
<td>83%</td>
<td>91%</td>
</tr>
<tr>
<td>Lana‘i</td>
<td>72%</td>
<td>64%</td>
</tr>
<tr>
<td>North / East Kaua‘i</td>
<td>72%</td>
<td>64%</td>
</tr>
<tr>
<td>South / West Kaua‘i</td>
<td>73%</td>
<td>69%</td>
</tr>
</tbody>
</table>

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: Opportunities for Destination Management
Opportunities for destination management in Hawai’i (Spring 2022 only)
(According to residents saying Hawai’i tourism creates more problems than benefits)

- Overcrowding: 69%
- Damage to the environment: 67%
- High prices/higher cost of living: 62%
- Traffic problems: 62%
- No respect for culture/tradition/āina: 55%
- Too dependent on tourism/should diversify: 54%
- Health concerns, viruses, potential for epidemics: 47%
- Locals don't benefit from tourism money: 34%
- Crime: 30%
- Loss of cultural/community sensitivity: 2%
- Tourism/Tourists are given priority: 2%
- Creates low paying jobs, no advancement: 1%
- Tourist safety an issue: 1%
- Influx of newcomers including foreign investors: 1%
- Other: 1%
- Refused: 1%

Base: 856
Q5. In your opinion, what problems do you think tourism has created in Hawai’i?
Opportunities for destination management in Hawai‘i (Fall 2021 & Spring 2022)
(According to residents saying Hawai‘i tourism creates more problems than benefits)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overcrowding</td>
<td>69%</td>
<td>68%</td>
</tr>
<tr>
<td>Damage to the environment</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>High prices/higher cost of living</td>
<td>62%</td>
<td>65%</td>
</tr>
<tr>
<td>Traffic problems</td>
<td>62%</td>
<td>67%</td>
</tr>
<tr>
<td>No respect for culture/tradition/‘āina</td>
<td>55%</td>
<td>62%</td>
</tr>
<tr>
<td>Too dependent on tourism/should diversify</td>
<td></td>
<td>54%</td>
</tr>
<tr>
<td>Health concerns, viruses, potential for epidemics</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Locals don’t benefit from tourism money</td>
<td></td>
<td>34%</td>
</tr>
<tr>
<td>Crime</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Loss of cultural/community sensitivity</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Tourism/Tourists are given priority</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base: Spring 2022 (856), Fall 2021 (973)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Opportunities for destination management in Hawai’i: O’ahu Residents
(According to residents saying Hawai’i tourism creates more problems than benefits)

- Overcrowding: 72% Spring 2022, 72% Fall 2021
- Damage to the environment: 71% Spring 2022, 68% Fall 2021
- High prices/higher cost of living: 69% Spring 2022, 64% Fall 2021
- Too dependent on tourism: 69% Spring 2022, 62% Fall 2021
- No respect for culture/tradition/‘āina: 69% Spring 2022, 61% Fall 2021
- Traffic problems: 69% Spring 2022, 61% Fall 2021
- Health concerns, potential for epidemics: 66% Spring 2022, 52% Fall 2021
- Locals don’t benefit from tourism money: 55% Spring 2022, 38% Fall 2021
- Crime: 39% Spring 2022, 36% Fall 2021
- Tourism/tourists are given priority: 5% Spring 2022, 2% Fall 2021
- Loss of cultural/community sensitivity: 2% Spring 2022, 2% Fall 2021
- Creates low paying jobs, no advancement: 1% Spring 2022, 1% Fall 2021
- Tourist safety an issue: <1% Spring 2022, <1% Fall 2021
- Influx of newcomers: <1% Spring 2022, <1% Fall 2021
- Vacation rental issues: <1% Spring 2022, <1% Fall 2021

Base: Spring 2022 (354), Fall 2021 (400)
Q5. In your opinion, what problems do you think tourism has created in Hawai’i?
Opportunities for destination management in Hawai‘i: Maui County Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

Base: Spring 2022 (222), Fall 2021 (216)
Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?

- Overcrowding: Spring 2022 (75%), Fall 2021 (70%)
- Damage to the environment: Spring 2022 (69%), Fall 2021 (70%)
- Traffic problems: Spring 2022 (70%), Fall 2021 (67%)
- High prices/higher cost of living: Spring 2022 (58%), Fall 2021 (62%)
- No respect for culture/tradition/‘āina: Spring 2022 (44%), Fall 2021 (47%)
- Too dependent on tourism: Spring 2022 (39%), Fall 2021 (37%)
- Health concerns, potential for epidemics: Spring 2022 (36%), Fall 2021 (38%)
- Locals don't benefit from tourism money: Spring 2022 (24%), Fall 2021 (33%)
- Crime: Spring 2022 (22%), Fall 2021 (15%)
- Loss of cultural/community sensitivity: Spring 2022 (3%), Fall 2021 (2%)
- Tourism/tourists are given priority: Spring 2022 (3%), Fall 2021 (2%)
- Influx of newcomers: Spring 2022 (2%), Fall 2021 (4%)
- Tourist safety an issue: Spring 2022 (<1%), Fall 2021 (<1%)
- Vacation rental issues: Spring 2022 (1%), Fall 2021 (1%)
- Creates low paying jobs, no advancement: Spring 2022 (1%), Fall 2021 (1%)

Omnitrak
DBEDT
Opportunities for destination management in Hawai‘i: Kaua‘i Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Spring 2022</th>
<th>Fall 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overcrowding</td>
<td>61%</td>
<td>69%</td>
</tr>
<tr>
<td>Traffic problems</td>
<td>63%</td>
<td>69%</td>
</tr>
<tr>
<td>Damage to the environment</td>
<td>52%</td>
<td>61%</td>
</tr>
<tr>
<td>High prices/higher cost of living</td>
<td>46%</td>
<td>61%</td>
</tr>
<tr>
<td>No respect for culture/tradition/‘āina</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>Too dependent on tourism</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Health concerns, potential for epidemics</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Locals don't benefit from tourism money</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>Crime</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Loss of cultural/community sensitivity</td>
<td>14%</td>
<td>32%</td>
</tr>
<tr>
<td>Tourist safety an issue</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>Influx of newcomers</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Tourism/tourists are given priority</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Vacation rental issues</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Creates low paying jobs, no advancement</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Opportunities for destination management in Hawai‘i: Hawai‘i Island Residents
(According to residents saying Hawai‘i tourism creates more problems than benefits)

- High prices/higher cost of living: Spring 2022 (62%), Fall 2021 (59%)
- Damage to the environment: Spring 2022 (60%), Fall 2021 (60%)
- Traffic problems: Spring 2022 (53%), Fall 2021 (52%)
- Overcrowding: Spring 2022 (59%), Fall 2021 (52%)
- No respect for culture/tradition/‘āina: Spring 2022 (45%), Fall 2021 (45%)
- Health concerns, potential for epidemics: Spring 2022 (41%), Fall 2021 (44%)
- Too dependent on tourism: Spring 2022 (39%), Fall 2021 (51%)
- Locals don’t benefit from tourism money: Spring 2022 (26%), Fall 2021 (34%)
- Crime: Spring 2022 (19%), Fall 2021 (17%)
- Loss of cultural/community sensitivity: Spring 2022 (3%), Fall 2021 (1%)
- Influx of newcomers: Spring 2022 (2%), Fall 2021 (1%)
- Tourist safety an issue: Spring 2022 (1%), Fall 2021 (1%)
- Tourism/tourists are given priority: Spring 2022 (1%), Fall 2021 (2%)
- Vacation rental issues: Spring 2022 (1%), Fall 2021 (1%)
- Creates low paying jobs, no advancement: Spring 2022 (1%), Fall 2021 (1%)

Base: Spring 2022 (190), Fall 2021 (209)

Q5. In your opinion, what problems do you think tourism has created in Hawai‘i?
Ways Residents can Support Tourism in Hawai‘i (Fall 2021 & Spring 2022)
(According to residents saying Hawai‘i tourism creates more benefits than problems)

Show the Aloha Spirit: Kind, Helpful, Respectful, Smiling
18% (Spring 2022) 18% (Fall 2021)

Educate tourists regarding land and people
10% (Spring 2022) 6% (Fall 2021)

Welcome them and understand their importance
12% (Spring 2022) 4% (Fall 2021)

Work in the tourism industry
4% (Spring 2022) 3% (Fall 2021)

Play tourist / Support local business/events
8% (Spring 2022) 4% (Fall 2021)

Marketing Hawai‘i / Encourage others to visit
3% (Spring 2022) 4% (Fall 2021)

Ensure a safe/pleasurable experience
3% (Spring 2022) 1% (Fall 2021)

Allow more community input/involvement
3% (Spring 2022) 2% (Fall 2021)

Keep Hawai‘i clean / protect the environment
4% (Spring 2022) 4% (Fall 2021)

Tolerate / Let them be / Stay away from them
3% (Spring 2022) 0% (Fall 2021)

Hawai‘i is too dependent on tourism
2% (Spring 2022) 1% (Fall 2021)

Manage/Control/Cap tourism
1% (Spring 2022) 3% (Fall 2021)

Have government support tourism
3% (Spring 2022) 2% (Fall 2021)

Discounts/lower taxes for tourism businesses
0% (Spring 2022) 1% (Fall 2021)

None
19% (Spring 2022) 13% (Fall 2021)

Don't Know
13% (Spring 2022) 14% (Fall 2021)

Base: 1265 (Spring 2022), 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?
Mahalo from the Omnitrak Group!