



Resident Sentiment Survey - Spring 2024



Prepared for the:
State of Hawai'i
Department of Business, Economic Development & Tourism
July 2024
Fielded: March 5 through April 30, 2024



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Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state's economy overall.
- The Resident Sentiment Survey (RSS) has been conducted 22 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 proportionately to population distribution per the latest State Census from the State Department of Business, Economic Development & Tourism.

Statewide sampling produced a total of $n = 1967$ respondents as follows:

- O'ahu: 828
- Hawai'i Island: 482
- Maui Island: 321, Moloka'i: 37, Lāna'i: 9
- Kaua'i: 290

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 25%) and online surveys (75%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: March 5 through April 30, 2024



Key Recommendations & Takeaways

Key Recommendations & Takeaways – State Overall

1 *Key measures of resident sentiment ticked upwards and are gaining on historic levels:* After an extended period of weakening, which started in the early 2010's, Hawai'i resident sentiment towards tourism is slowly gaining momentum with improvement in areas that tourism should be actively encouraged and that the industry is being better managed.

Key Resident Sentiment Tracking Statements

Mean Scores	Fall 2021	Spring 2022	Fall 2022	Spring 2023	Spring 2024
Tourism has brought more benefits than problems	5.67	5.94↑	6.05	5.92	6.07
Perceived impact of tourism on you and your family	6.01	6.02	6.21	6.10	6.33
Tourism is being better managed on my island	5.06	5.33	5.44	5.34	5.65↑
Tourism should be actively encouraged on my Island	5.87	6.10↑	6.07	6.07	6.39↑
<i>My island is run for tourists at expense of local people</i>	6.98	6.93	6.92	6.87	6.93

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

2 *Having a voice in development decisions is now a main driver of resident sentiment.* While numerous factors impact perceptions of the industry, having a Voice in development decisions has re-emerged as the single, top individual driver of sentiment, responsible for 15% of driver importance. Other key drivers relate to economic benefits such as Supporting local businesses (11%) and Creating jobs for residents (11%). As these areas extend beyond HTA's direct areas of authority, they will require an integrated effort between multiple public and private sector organizations.

3 *The perceived balance of tourism's benefits vs. challenges edged upwards:* Perceptions that Tourism has brought more benefits than problems have regained ground to 56%, a similar level reported in 2022. The positive news is that overcrowding is less top of mind for residents. However, in its place, residents now worry about the industry's impact on cost of living, shifting a focus on the industry's economic benefits and challenges.

		Fall 2022	Spring 2023	Spring 2024
Tourism Benefits (Mean Scores)	Creates jobs for residents	7.4	7.4	7.5
	Enhances residents' quality of life	5.5	5.4	5.7
Tourism Challenges (% reporting)	Higher cost of living	70%	73%↑	75%
	Damage to the environment	71%	75%↑	70%
	No respect for culture/'āina	70%	69%	69%
	Overcrowding	73%	74%	65%↓

Improved perceptions on the economic impacts of the industry is the result of a reduction in negative sentiment in these areas. Fewer residents are naysayers in these economic areas and are responsible for lifting overall sentiment.

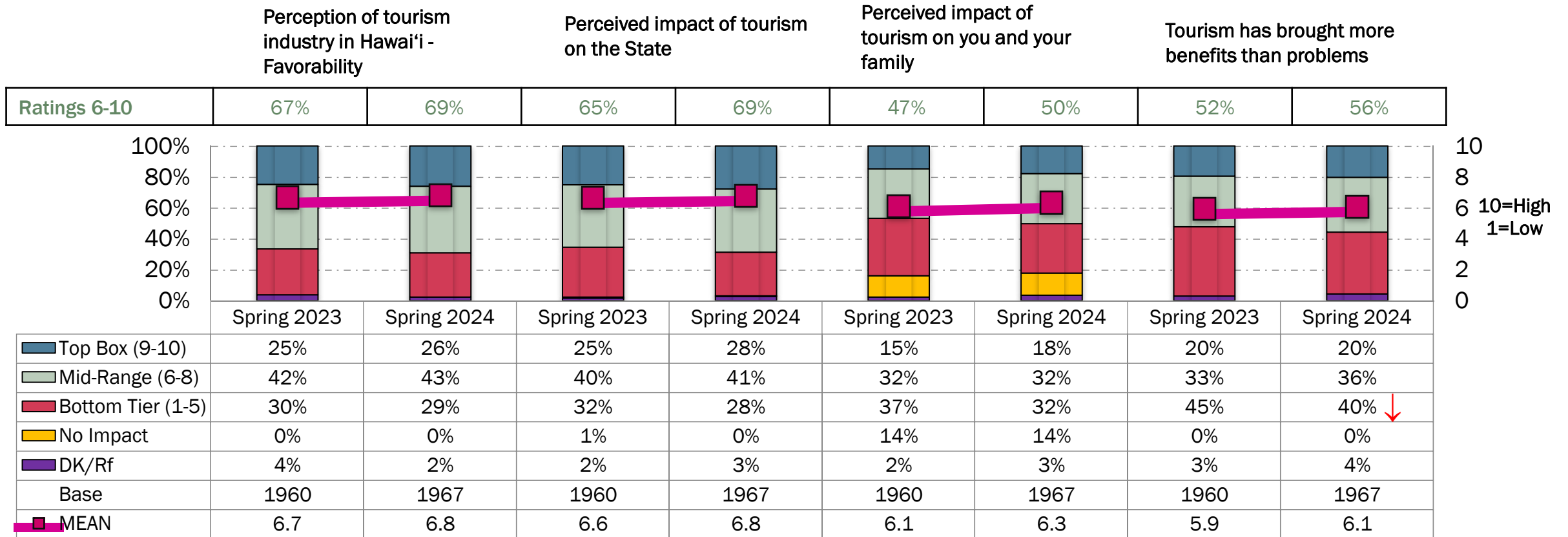
Naysayers or Negative perceptions of the industry 1-5 ratings (lower scores are better)	Spring 2023	Spring 2024
Tourism has more benefits than problems	45%	40%↓
Creates job opportunities for residents	23%	19%↓
Creates job opportunities for advancement	34%	30%↓
Tourism should be encouraged	43%	36%↓



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

High-level key indicators of Hawai'i resident sentiment towards tourism have improved slightly in Spring 2024, although remaining below historic levels. Across all major indicators, resident sentiment ticked upwards during this period, especially in the important area of *Tourism bringing more benefits than problems*.



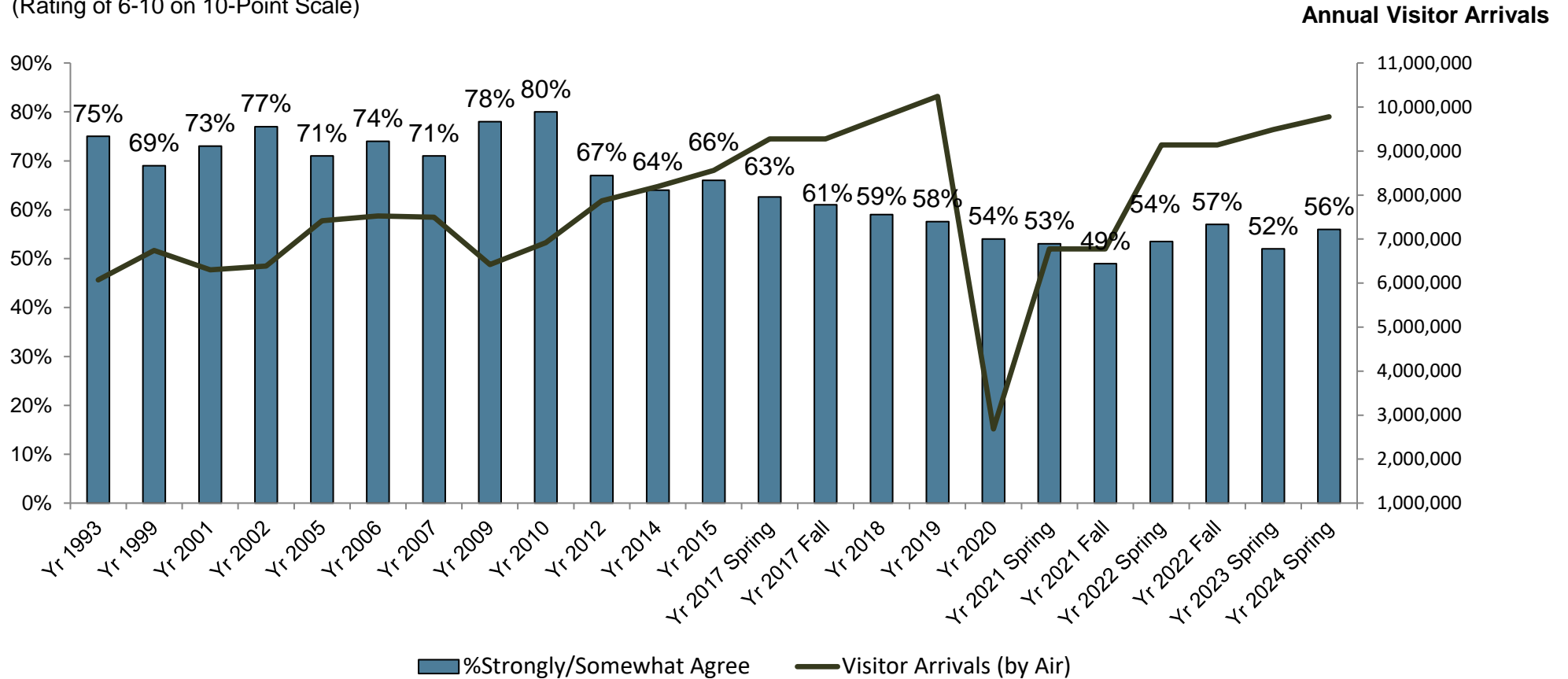
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

“Tourism has brought more benefits than problems” ticked upwards in 2024

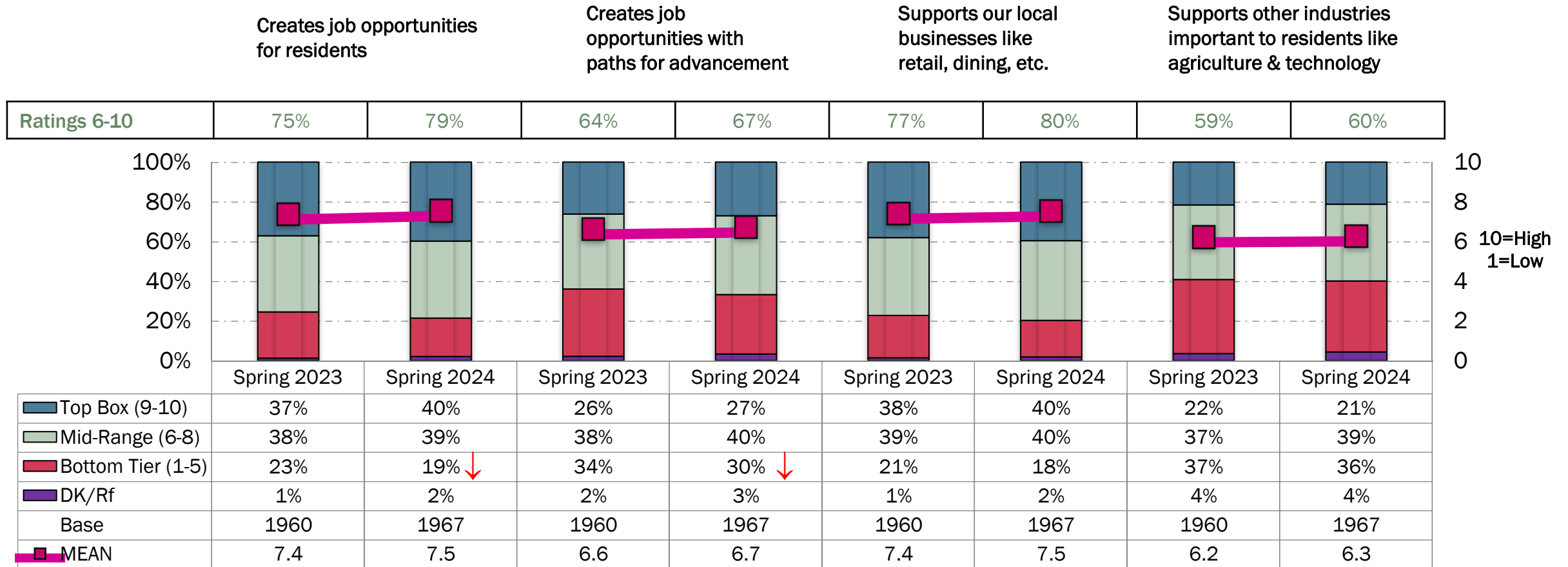
% strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-10 on 10-Point Scale)



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

Executive Summary – Economic Impact Indicators

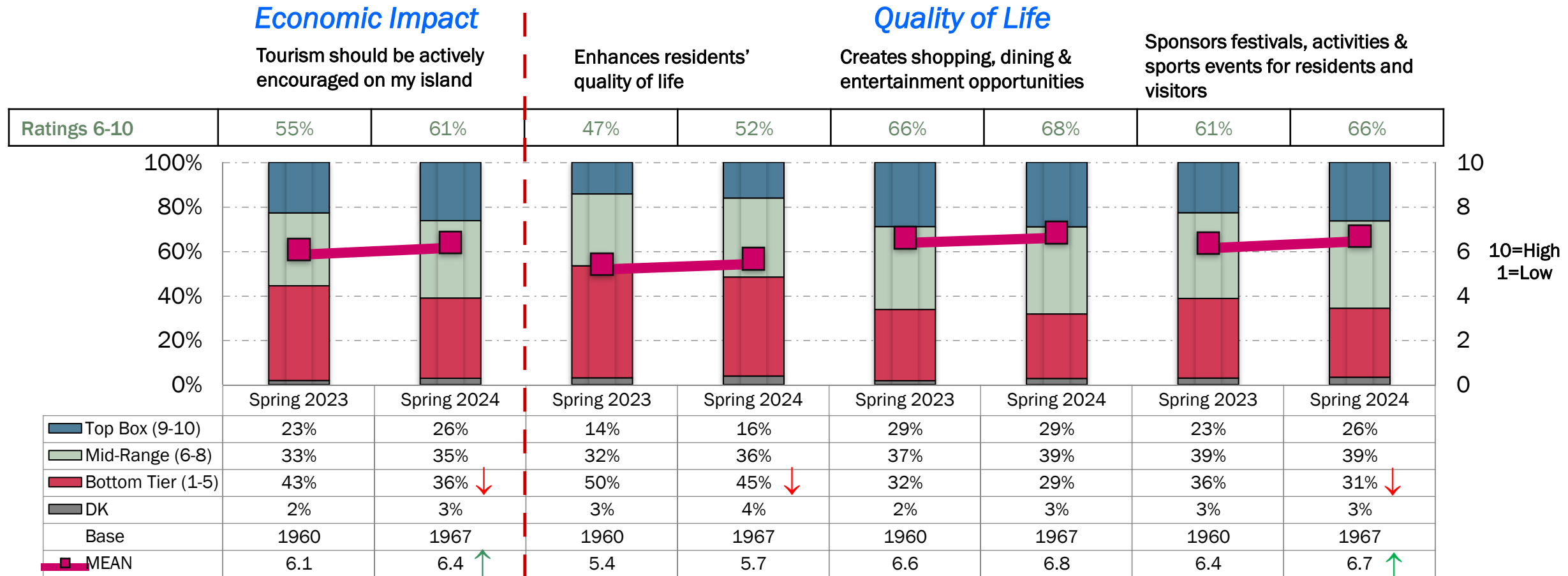
Economic impact indicators also improved slightly, reporting positive perceptions regarding the contribution of tourism to job creation for residents and opportunities for advancement. Slight gains are apparent across these indicators, as negative sentiment in these areas has lessened from the prior year.



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

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

Tourism’s impact on quality of life also improves slightly with modest gains in all indicators. Here too, reductions in negative sentiment help to lift the overall mood in these areas. All of these slight improvements have lifted the mood such that an improvement is noted in those who say tourism should be actively encouraged on their island, albeit below historic levels.



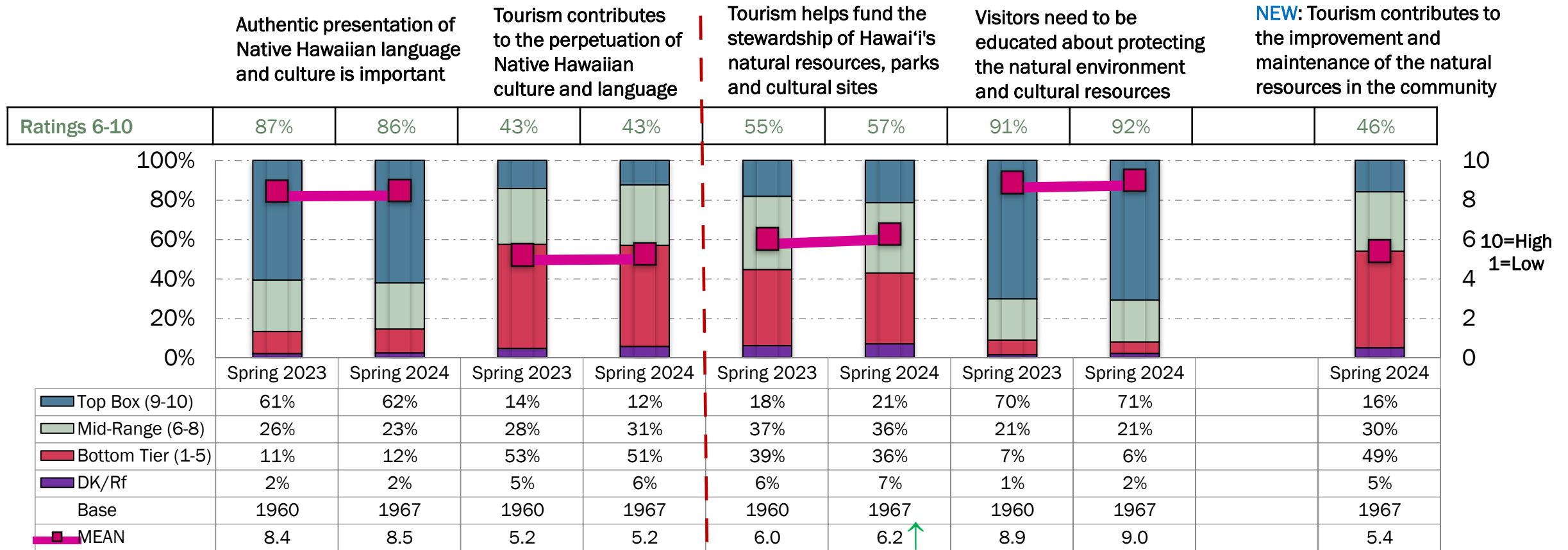
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary – Native Hawaiian Cultural & Sustainability Indicators

Residents strongly agree on the importance of *Authentic presentation of the Native Hawaiian culture/language* and that *Visitors need to be educated on protecting Hawai'i's natural environment and cultural resources*. On the other hand, residents remain neutral in their assessment that *Tourism contributes to the perpetuation of the Native Hawaiian culture* and are only slightly positive that *Tourism helps to fund stewardship of Hawai'i's resources*. Similarly, residents are neutral on the newly added indicator that *Tourism contributes to natural resources in the community*.

Native Hawaiian Cultural Indicators

Sustainability and Natural Resources

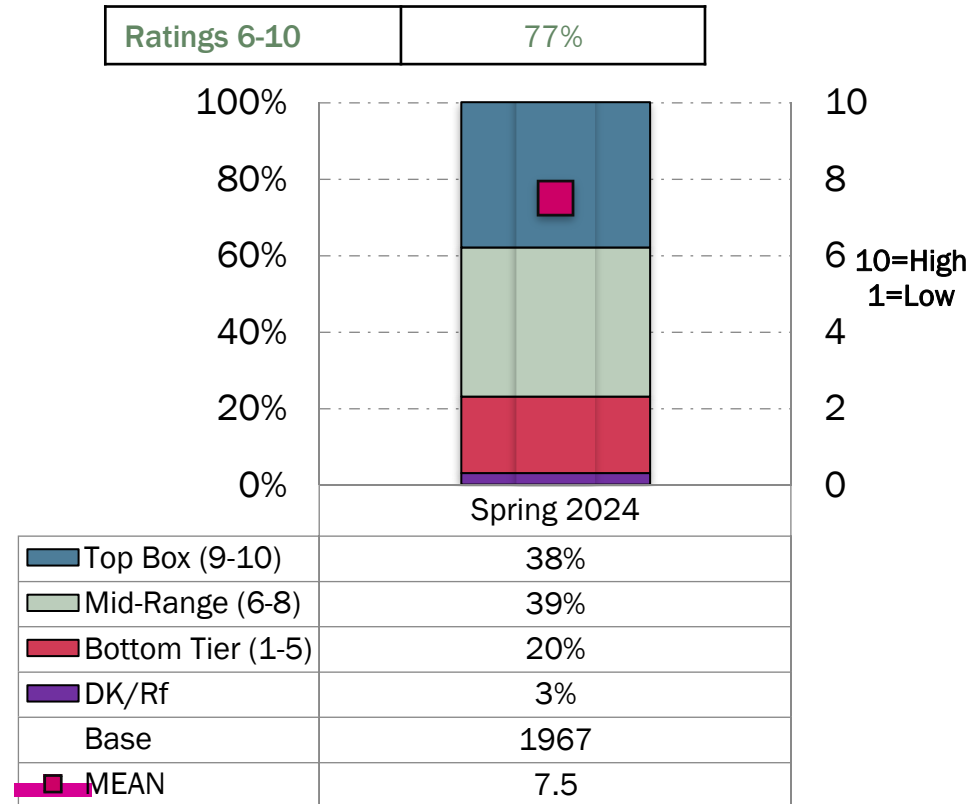


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary – Safety and Security

Newly added in Spring 2024, residents are asked if they feel safe in visitor destinations in Hawai'i – here there was moderately strong agreement that most destinations in the state are safe, with only 20 percent in disagreement.

NEW: I feel safe when I travel to visitor destinations in Hawai'i

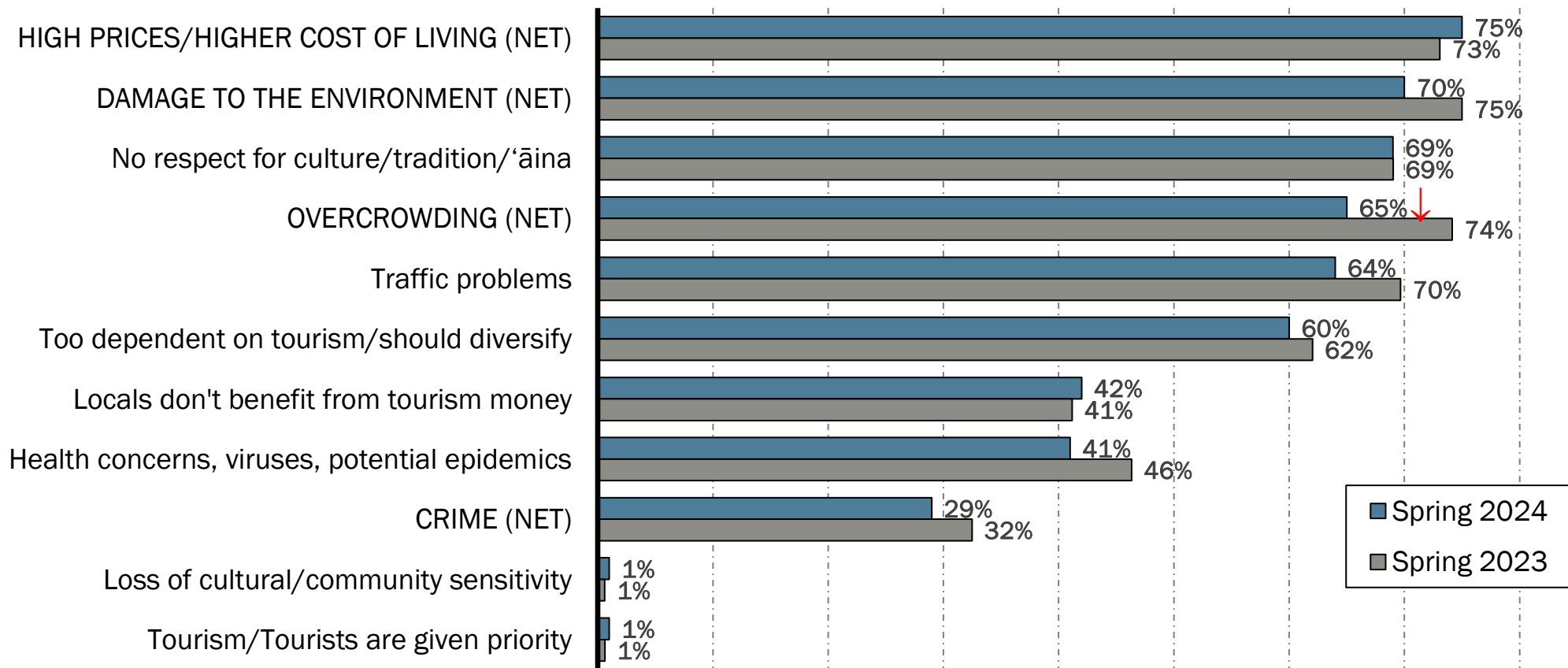


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Problems Created by Tourism in Hawai'i (Trends Spring 2023-2024)

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

Among residents who say that the benefits of tourism do not outweigh the problems, the top perceived problems created by tourism are *High prices/higher cost of living* (75%), *Damage to the environment* (70%), and a *Lack of respect* (69%). Noteworthy, *Overcrowding* dipped sharply this year – a reason for slightly higher sentiment and a positive sign that tourism management efforts are paying off.

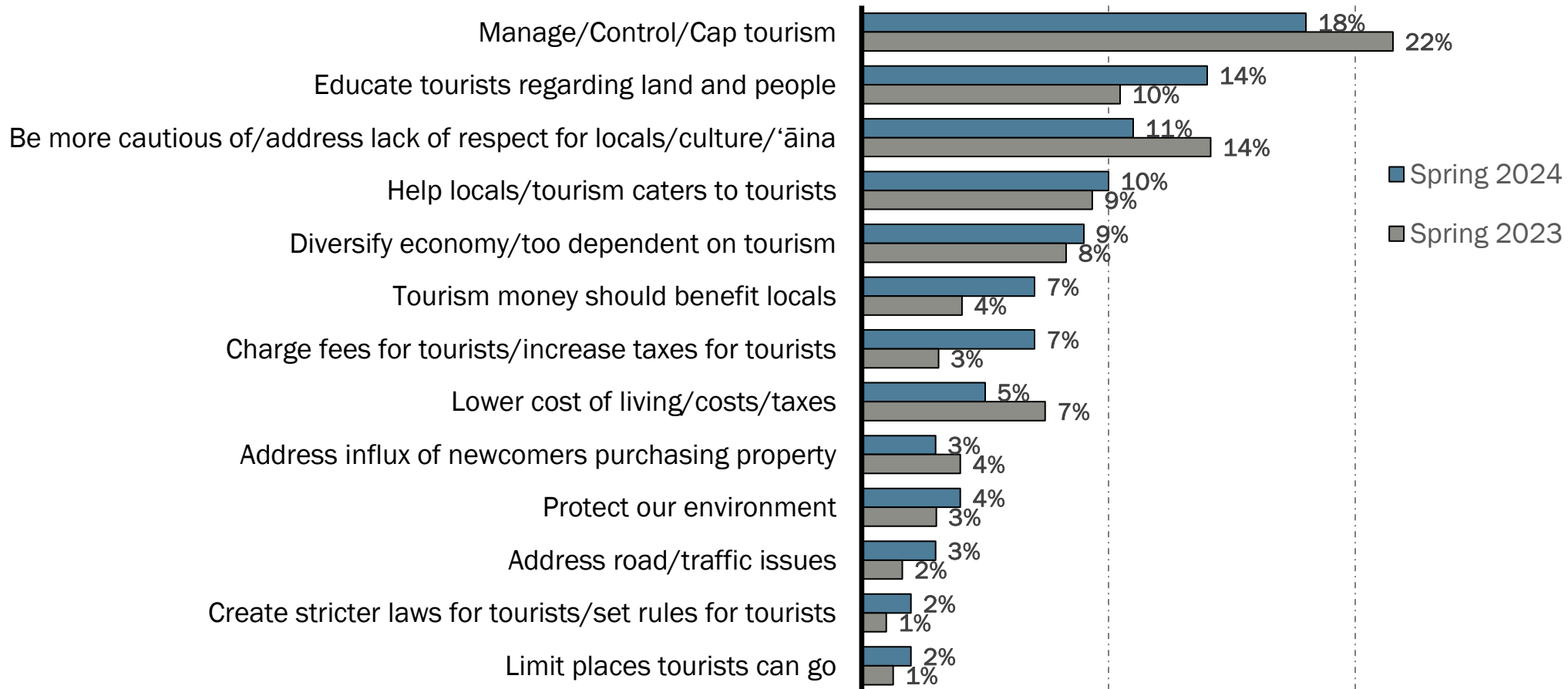


Base: Spring 2023 (902), Spring 2024 (821).
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Opportunities for Improving Opinion of Tourism (Spring 2023-2024)

(According to residents **not** favorable toward tourism in Hawai'i)

Among residents who did not express a favorable opinion of tourism in Hawai'i, the top actions cited for improving their opinions are *Managing/controlling/capping tourism (18%), Educating tourists regarding the state's land and people (14%) and Addressing visitors' lack of respect for locals/culture/'āina (11%)*.



Base: Spring 2023 (623), Spring 2024 (579)

Q6a. You said that you do not have a favorable opinion of tourism. What would it take to improve your opinion? Anything else?

Executive Summary – Balance: Negative Impacts/Managed Tourism

Apart from specific perceived problems created by tourism, the number of residents who thought their *Island is run for tourists at the expense of local people* (67%) and that their *Island's economy is too dependent on tourism* (80%) held steady since 2022. Residents' assessment of managed tourism measures, such as *Tourism being better managed* and having a *Voice in tourism development decisions* rose sharply this year due to a reduction in negative sentiment.

Negative Impacts

Island is run for tourists at expense of local people

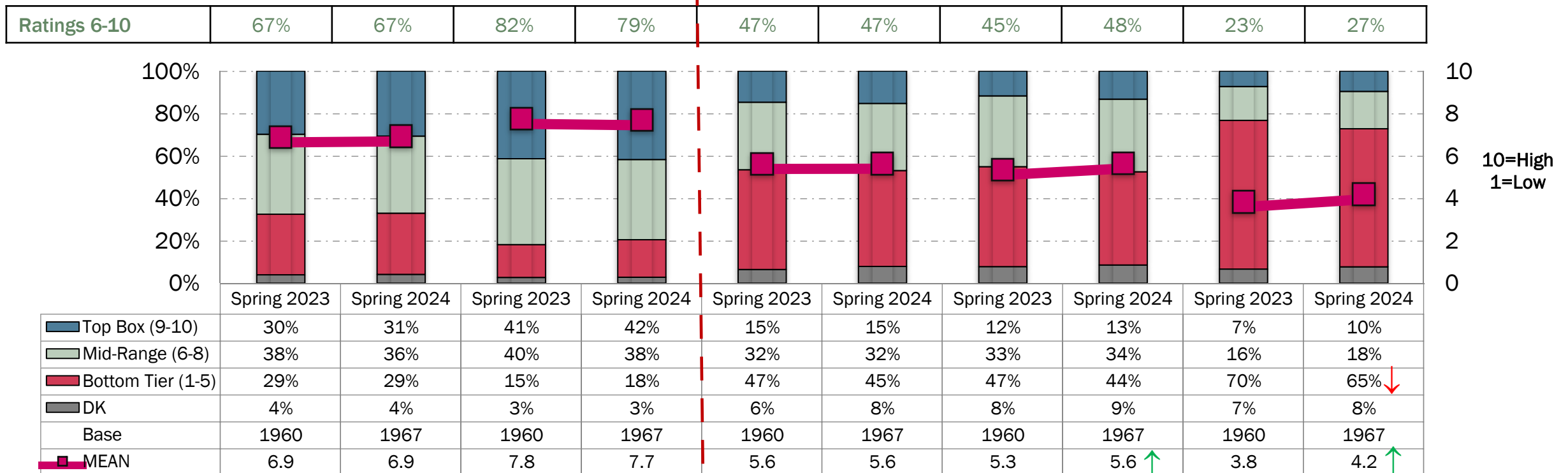
Island economy is too dependent on tourism

Managed Tourism

More effort is made to balance economic benefits of tourism and quality of life for residents

Tourism is being better managed on my island

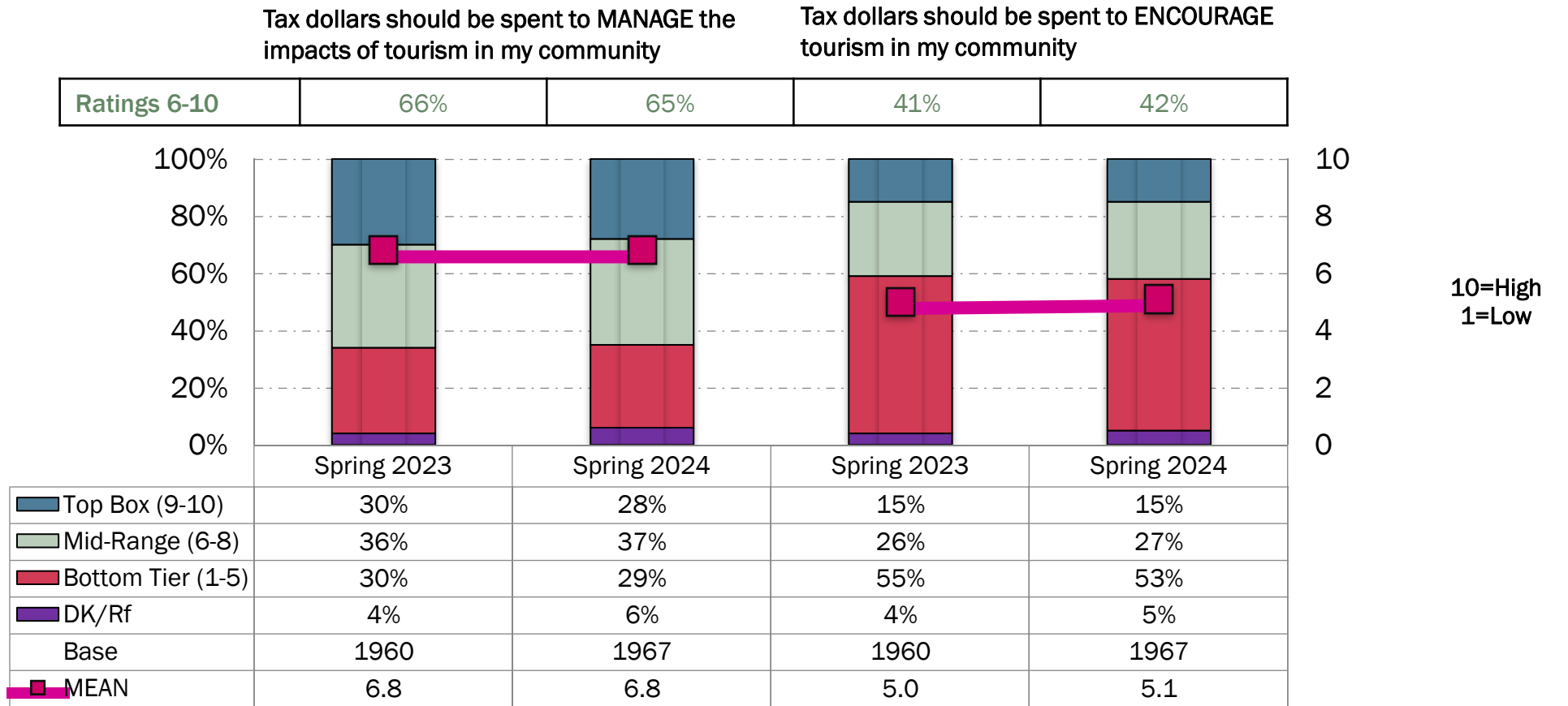
I have a voice in my island's tourism development decisions



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.

Executive Summary – Tax Dollars Should be Spent to Manage Tourism

Similarly, public support for utilizing tax revenues to manage the impacts of tourism on communities continued to lean favorably. Approximately two-thirds (65%) of respondents continued to express strong or somewhat agreeable opinions on this idea. Perceptions, however, remain divided among those who say tax revenue should be used to encourage tourism, with about half expressing positive and negative support.

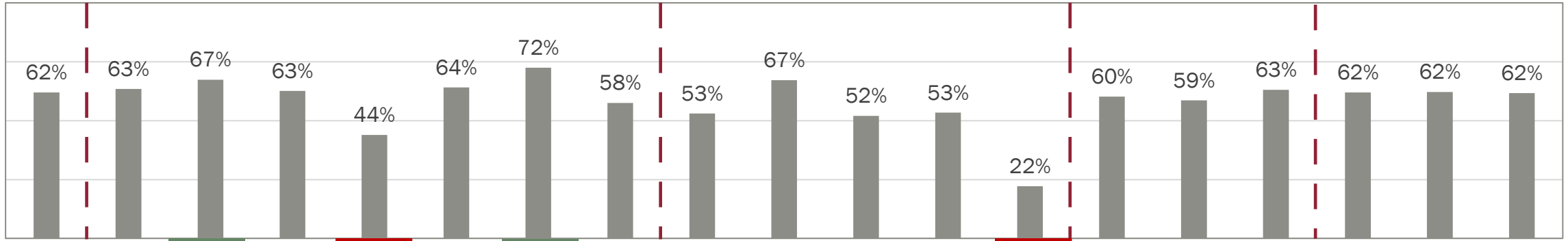


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

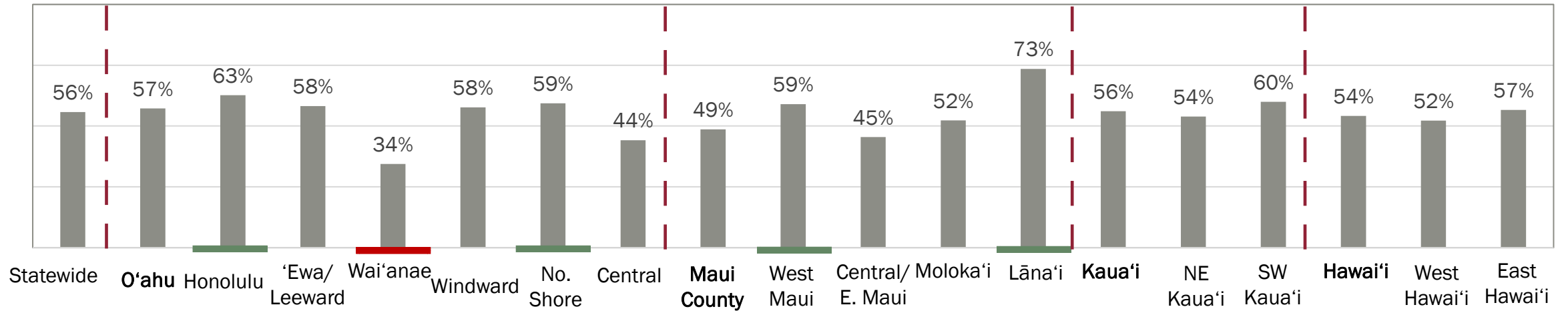
Executive Summary –Tourism is Worth the Issues, Benefits Outweigh Problems by Island/Area

At the community level, residents most critical of *Tourism being worth the issues associated with it* resided in Wai‘anae, while the North Shore of O‘ahu reversed and now shows positive support. On the other hand, Lāna‘i residents now show the weakest support on this particular measure.

“Tourism is worth the issues associated with it” (Rating 6-10)



“Tourism has brought more benefits than problems” (Rating 6-10)



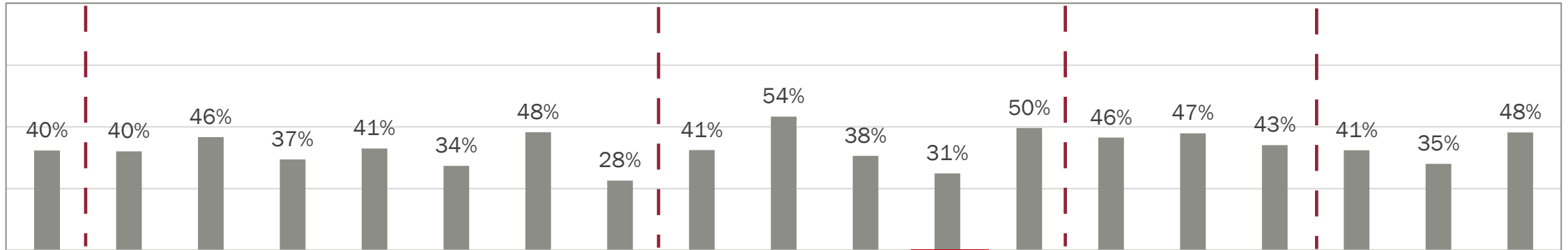
Q3. In 2023, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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.

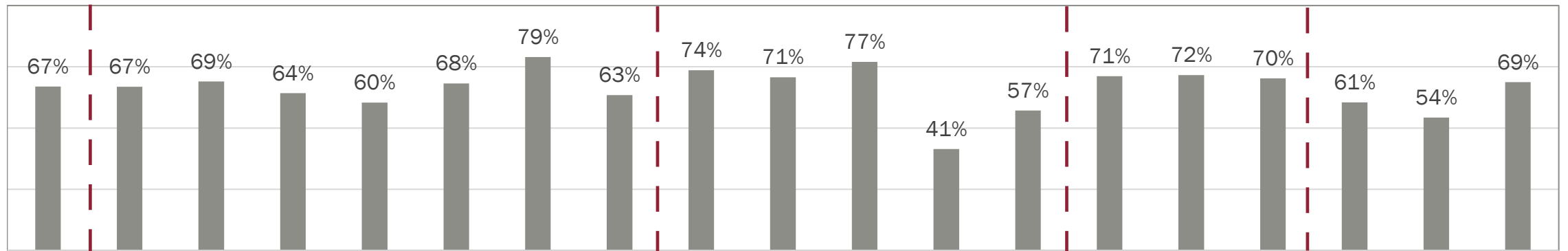
Key Indicators by Island/Area (continued)

At the community level, residents least likely to feel that *Tourism is mostly positive for their family* reside in the Central, Windward, and 'Ewa/Leeward areas of O'ahu and on Moloka'i.

"Tourism has been 'mostly positive' for you and your family" (Rating 7-10)



"This island is being run for tourists at the expense of local people" (Rating 6-10)



Statewide O'ahu Honolulu 'Ewa/Leeward Wai'anae Windward No. Shore Central Maui County West Maui Central/E. Maui Moloka'i Lāna'i Kaua'i NE Kaua'i SW Kaua'i Hawai'i West Hawai'i East 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...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.

Awareness of HTA Destination Stewardship Initiatives

Nearly six-out-of-ten (58%) Hawai'i residents are aware that the Hawai'i Tourism Authority is working on destination stewardship initiatives. Awareness among Lāna'i residents was the highest in the State, with 64 percent of residents aware of at least one of the HTA Destination Stewardship initiatives referenced in the research.

	Percent of residents aware of at least one specific HTA destination stewardship initiative	Are you aware that the HTA is working on.....? [Examples of HTA destination stewardship programs by island]		
State Overall	58%			
O'ahu	59%	Pre- and post-arrival visitor communications program	Stewardship plans for key hotspots on O'ahu	Curated experiences for residents and visitors
Hawai'i Island	57%	Preservation of culturally significant hotspots	Resources to perpetuate authentic Hawaiian culture	Plan to facilitate positive community-visitor relations
Maui Island	58%	Responsible tourism communications program	Cultural education and training programs	Regenerative tourism strategies
Moloka'i	48%	Responsible visitor behaviors communications program	Product development focused on Regenerative tourism	Enhance interisland transportation options
Lāna'i	64%	Lāna'i City promotions	Encourage meaningful day trips or stays on Lāna'i	Implement the Mālama Maui County Pledge
Kaua'i	56%	Focus policy efforts on visitor and resident behavior	Address overtourism by managing Kaua'i visitors	Local culture educational materials for visitors

Awareness of HTA Destination Stewardship Initiatives (continued)

Residents aware of Destination Stewardship initiatives are significantly more apt to feel that such efforts are working, and that the balance between tourism’s positive and negative impacts, weigh more toward the positive.

Awareness of Destination Stewardship initiatives positively impacts resident sentiment

	Mean Scores	Aware*	Unaware
Destination Stewardship	<i>Tax dollars should be spent to manage the impacts of tourism in my community</i>	7.0	6.4
	<i>Tourism is being better managed on my island</i>	6.2	4.8
Destination Balance	<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.1	4.9
	<i>Tourism has brought more benefits than problems</i>	6.5	5.5
	<i>Tourism is worth the issues associated with the industry</i>	7.0	6.2

*Note: Aware of at least one Hawai'i Tourism Authority destination stewardship initiative.
Q10A. Are you aware that the HTA is working on.....?

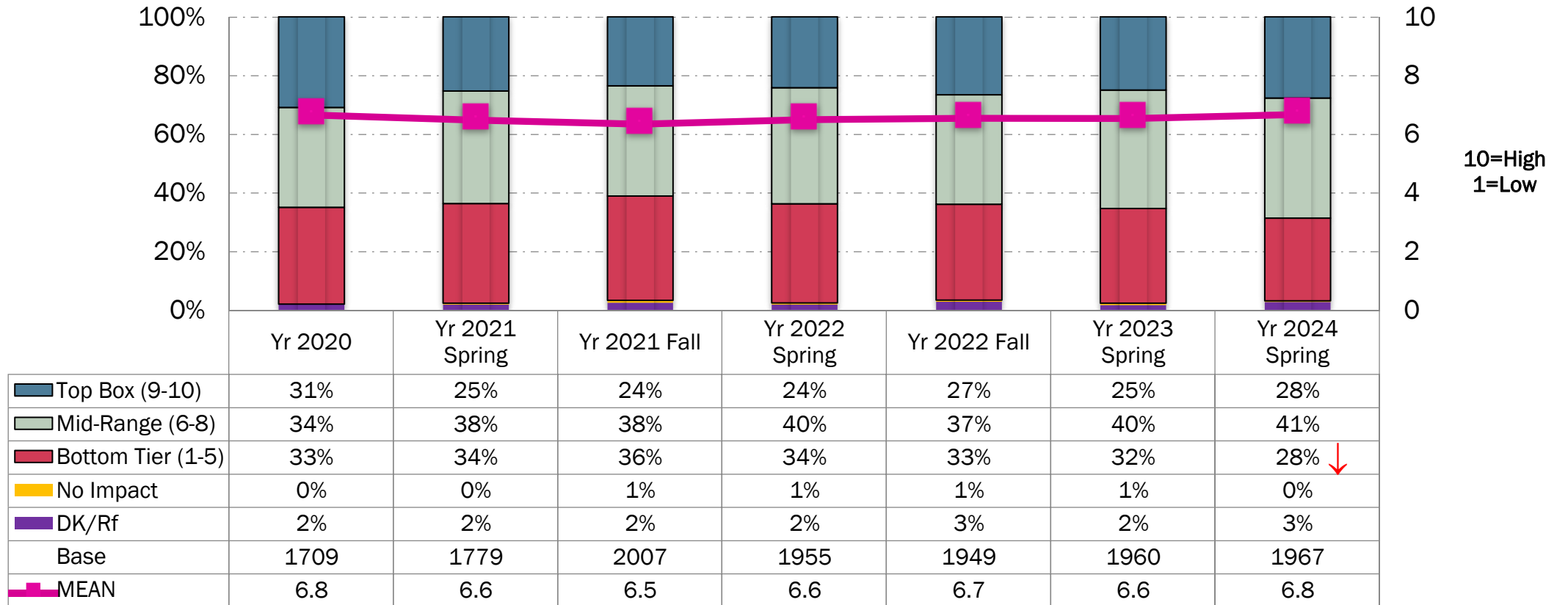


DETAILED FINDINGS



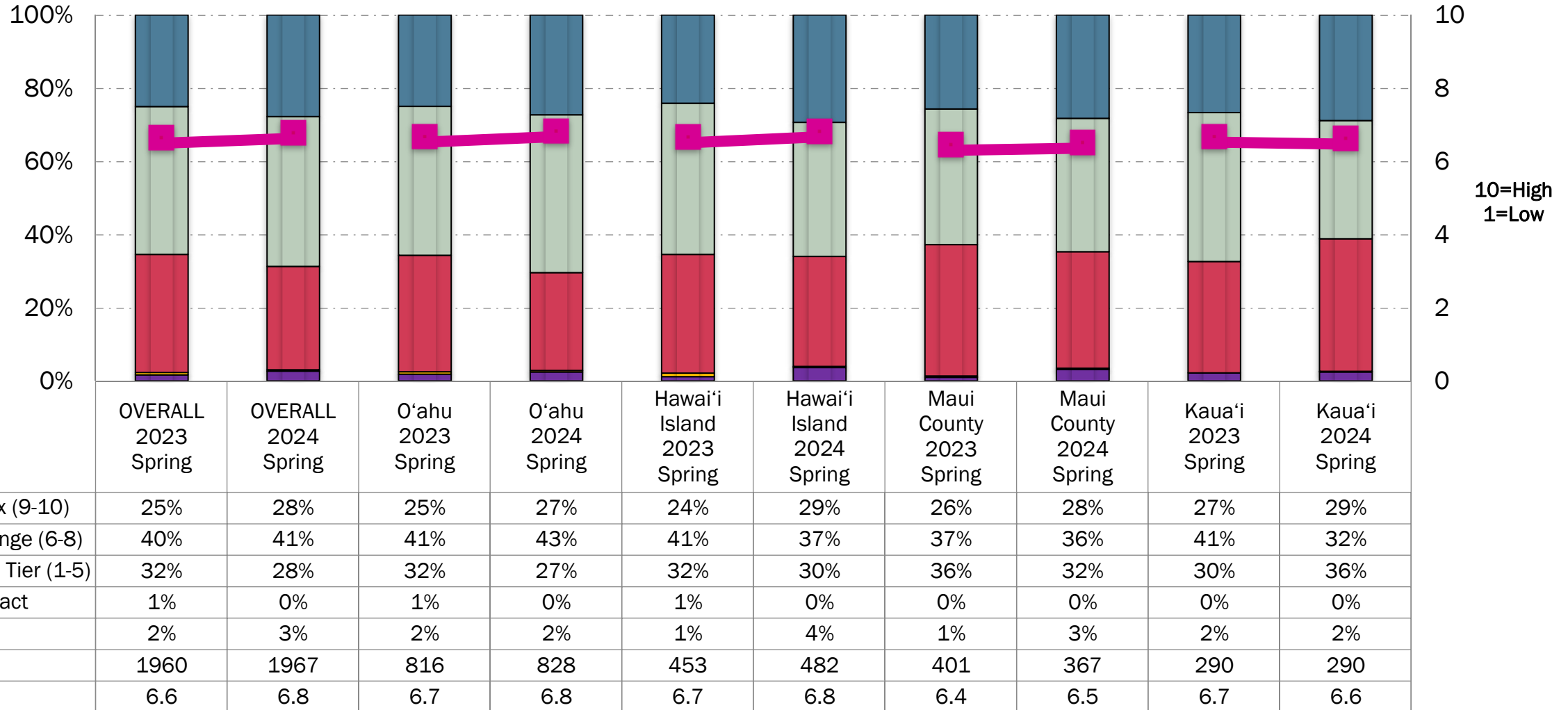
Impact of the Visitor Industry

Impact of Tourism on the State - *Overall*



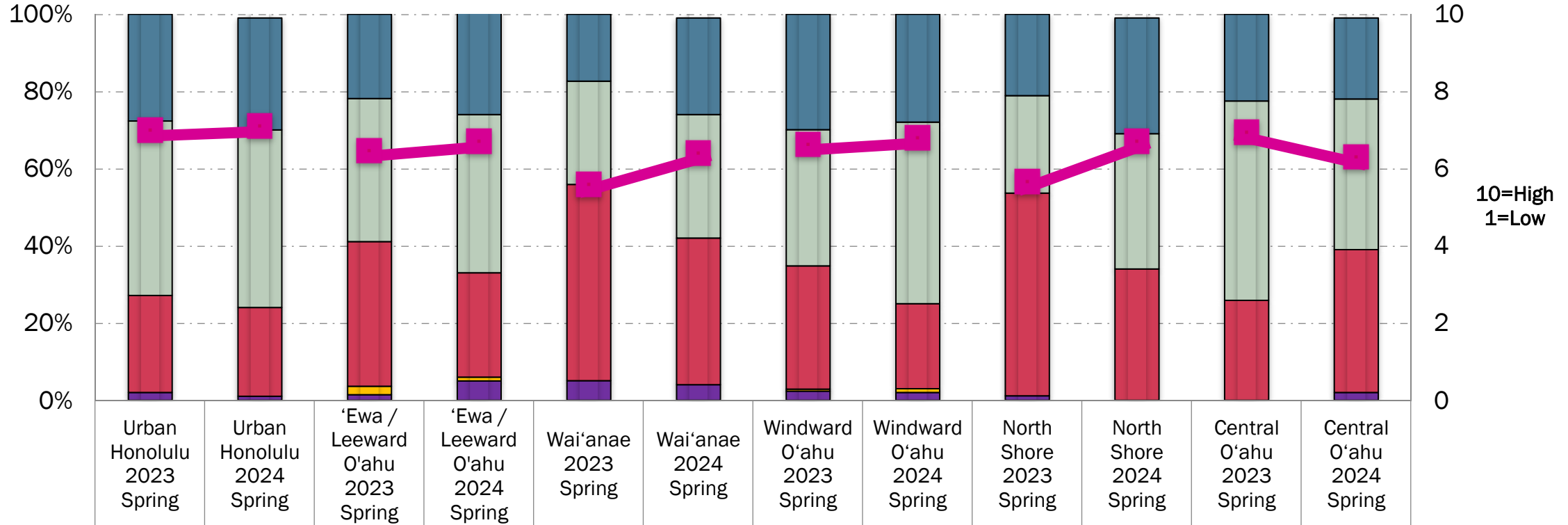
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By County*



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

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



	Urban Honolulu 2023 Spring	Urban Honolulu 2024 Spring	'Ewa / Leeward O'ahu 2023 Spring	'Ewa / Leeward O'ahu 2024 Spring	Wai'anae 2023 Spring	Wai'anae 2024 Spring	Windward O'ahu 2023 Spring	Windward O'ahu 2024 Spring	North Shore 2023 Spring	North Shore 2024 Spring	Central O'ahu 2023 Spring	Central O'ahu 2024 Spring
Top Box (9-10)	28%	29%	22%	27%	17%	25%	30%	28%	21%	30%	23%	21%
Mid-Range (6-8)	45%	46%	37%	41%	27%	32%	35%	47%	25%	35%	52%	39%
Bottom Tier (1-5)	25%	23%	37%	27%	51%	38%	32%	22%	53%	34%	26%	37%
No Impact	0%	0%	2%	1%	0%	0%	0%	1%	0%	0%	0%	0
DK/Rf	2%	1%	1%	5%	5%	4%	2%	2%	1%	0%	0%	2%
Base	300	300	150	152	79	84	125	125	80	82	82	85
MEAN	7.0	7.1	6.5	6.7	5.6	6.4	6.6	6.8	5.7	6.7	6.9	6.3

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

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



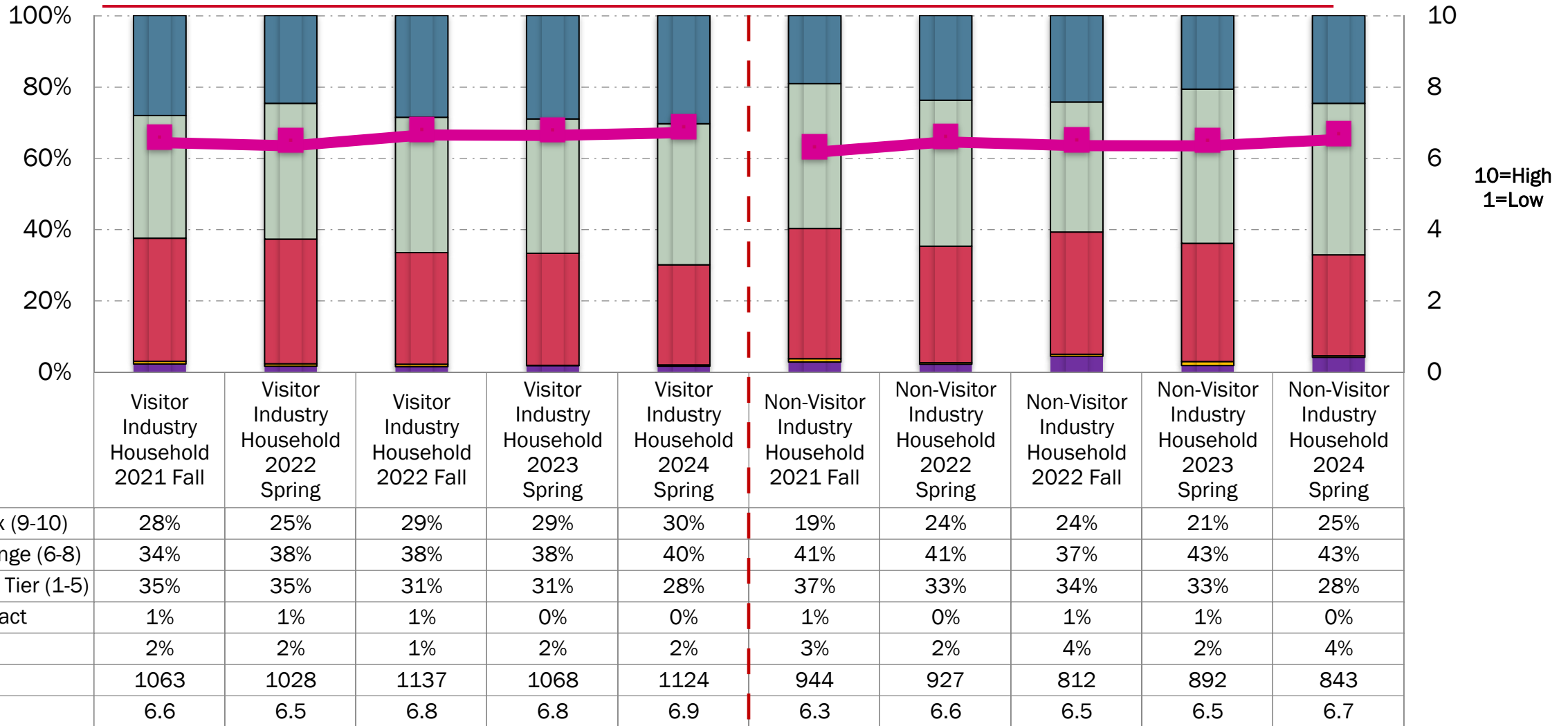
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



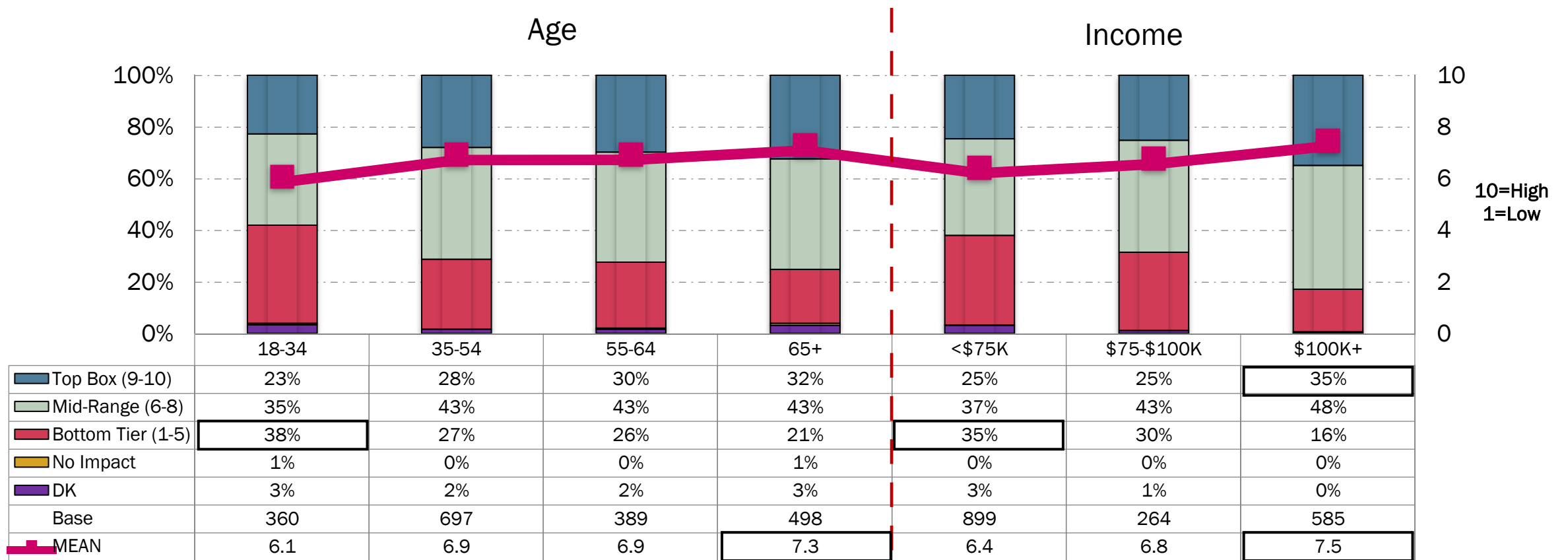
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



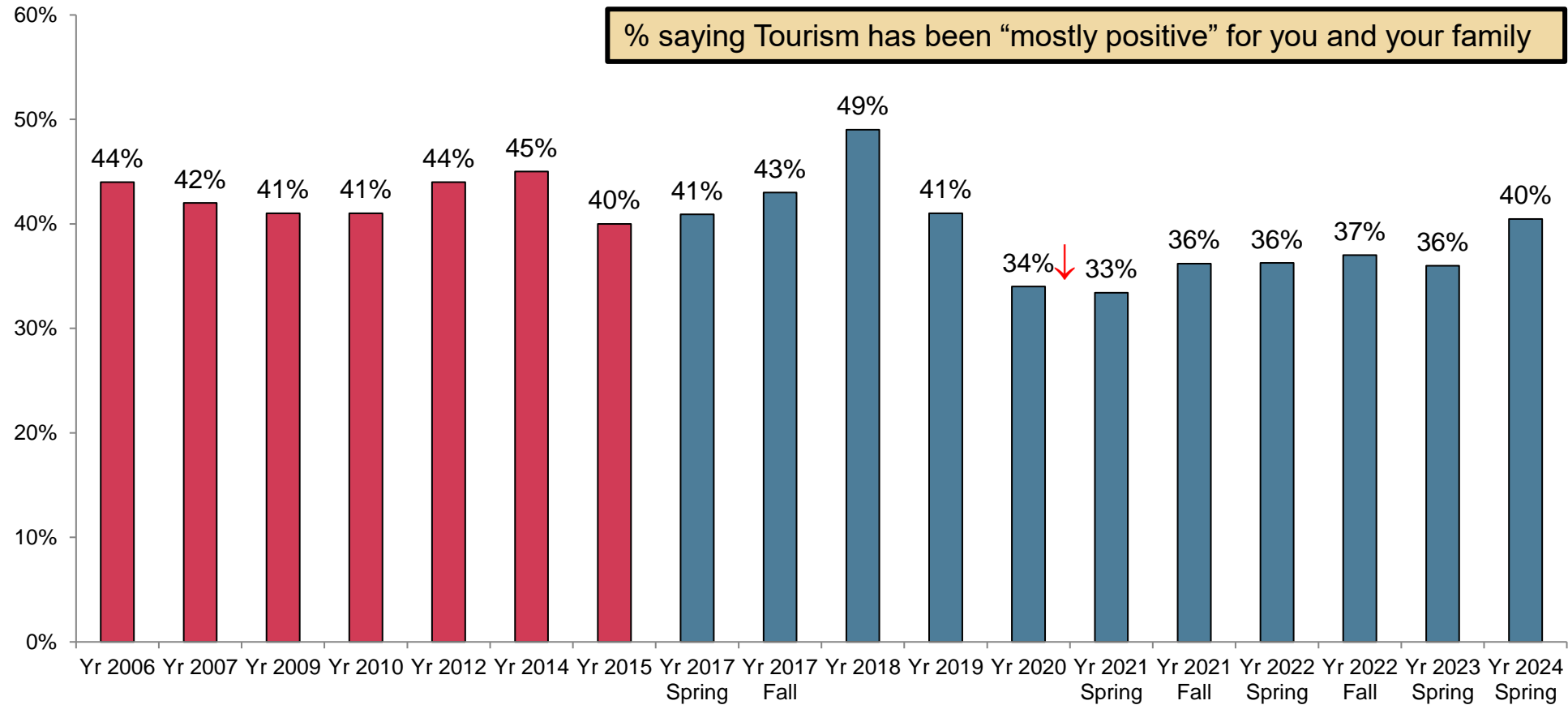
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



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

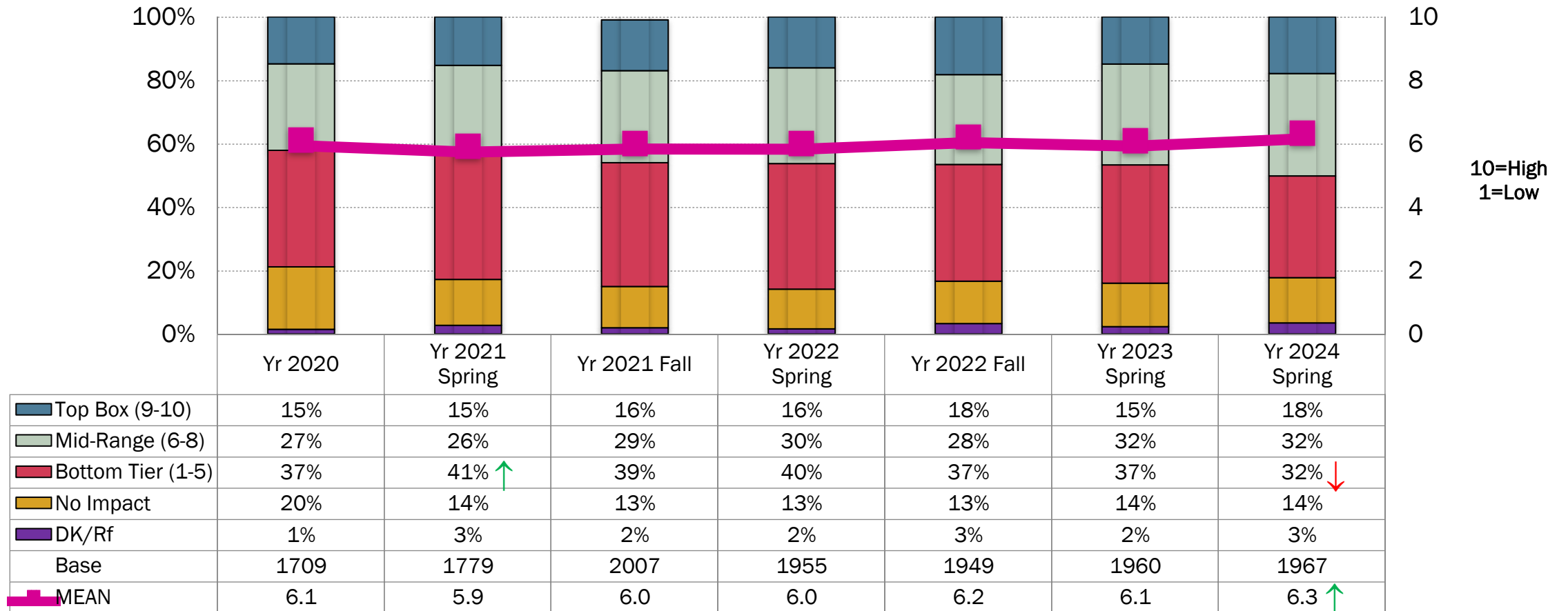
Impact of Tourism on You & Your Family – *Overall Trend*



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

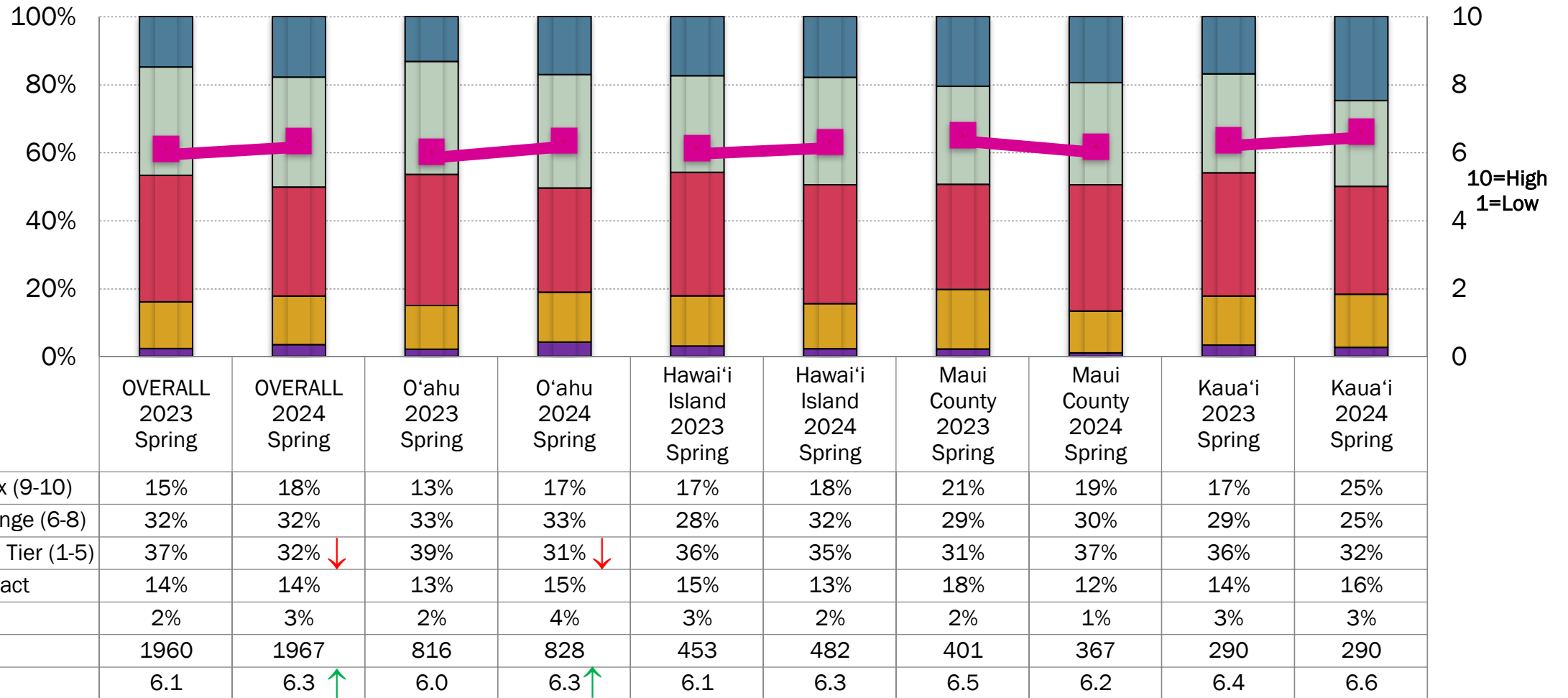
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – Overall



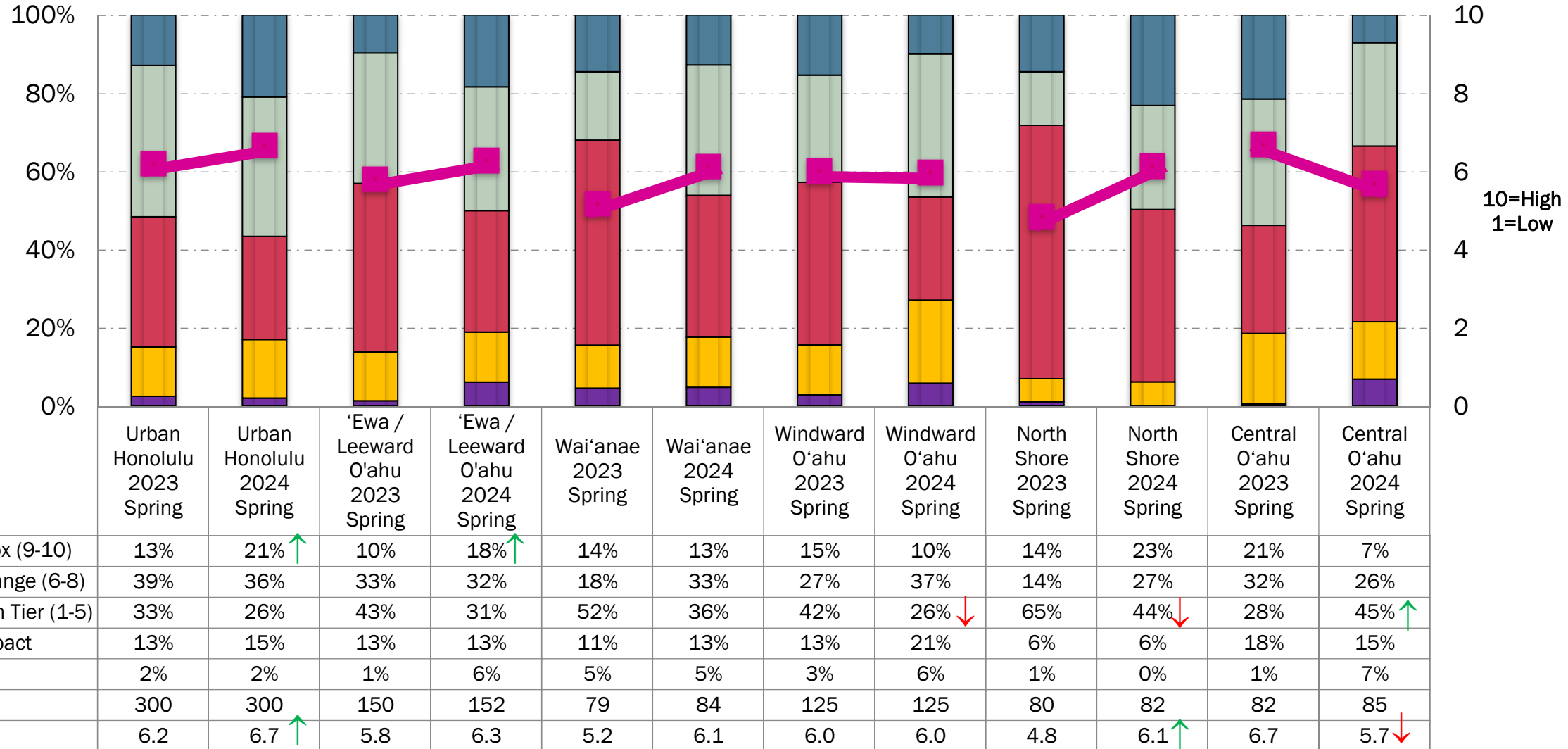
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



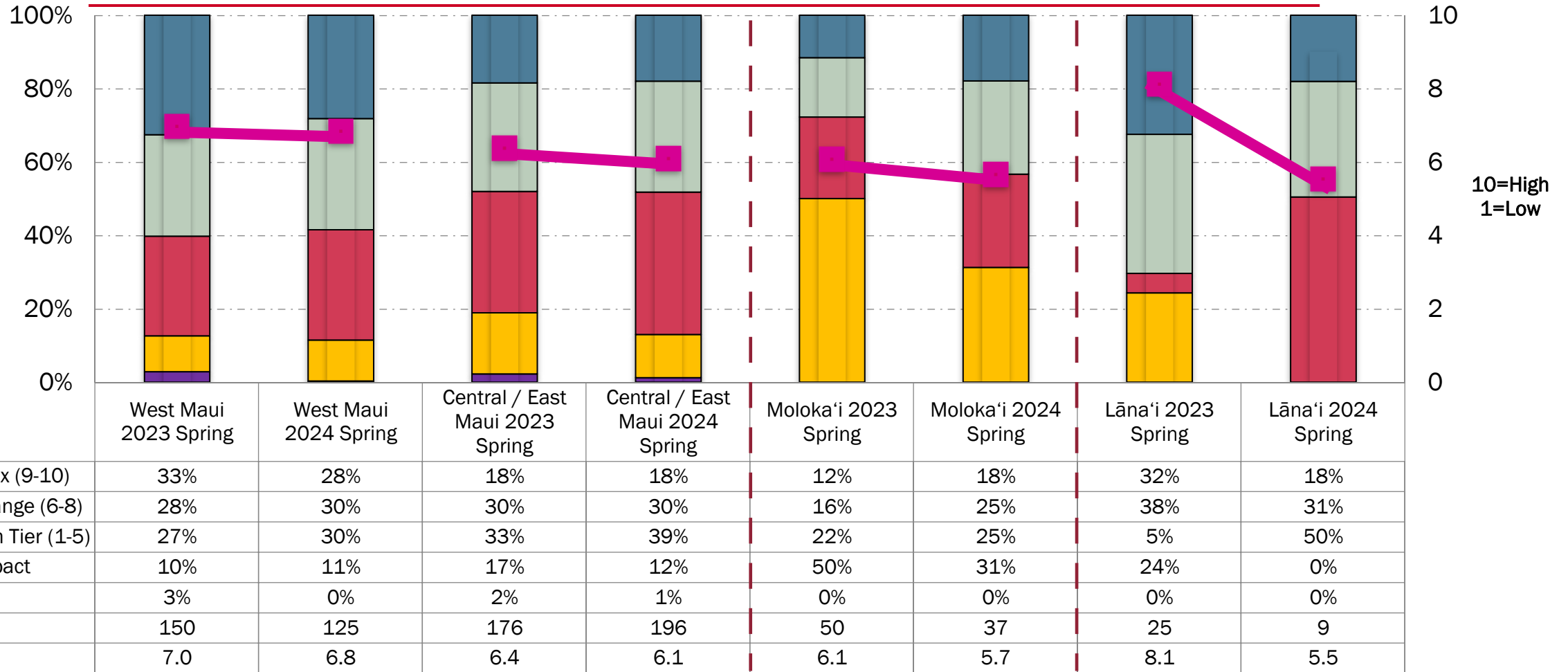
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



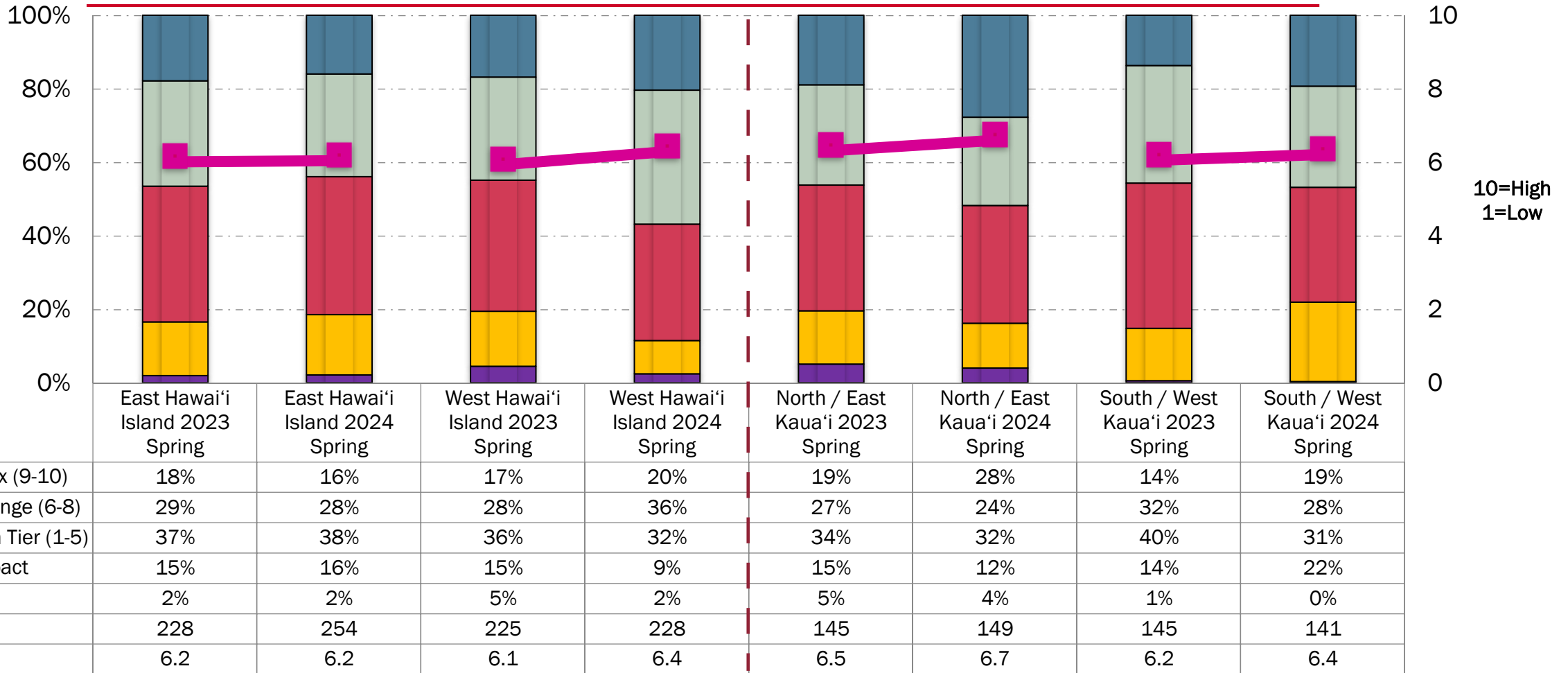
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



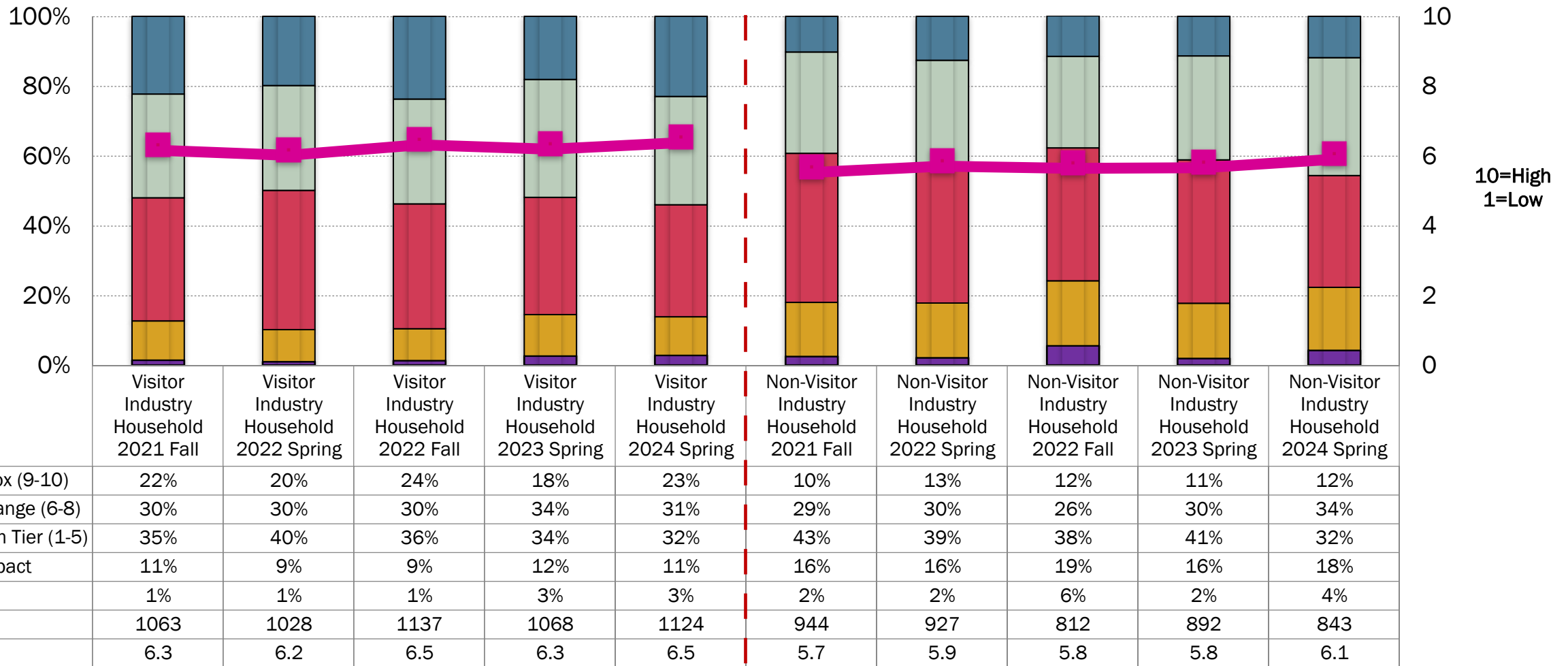
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



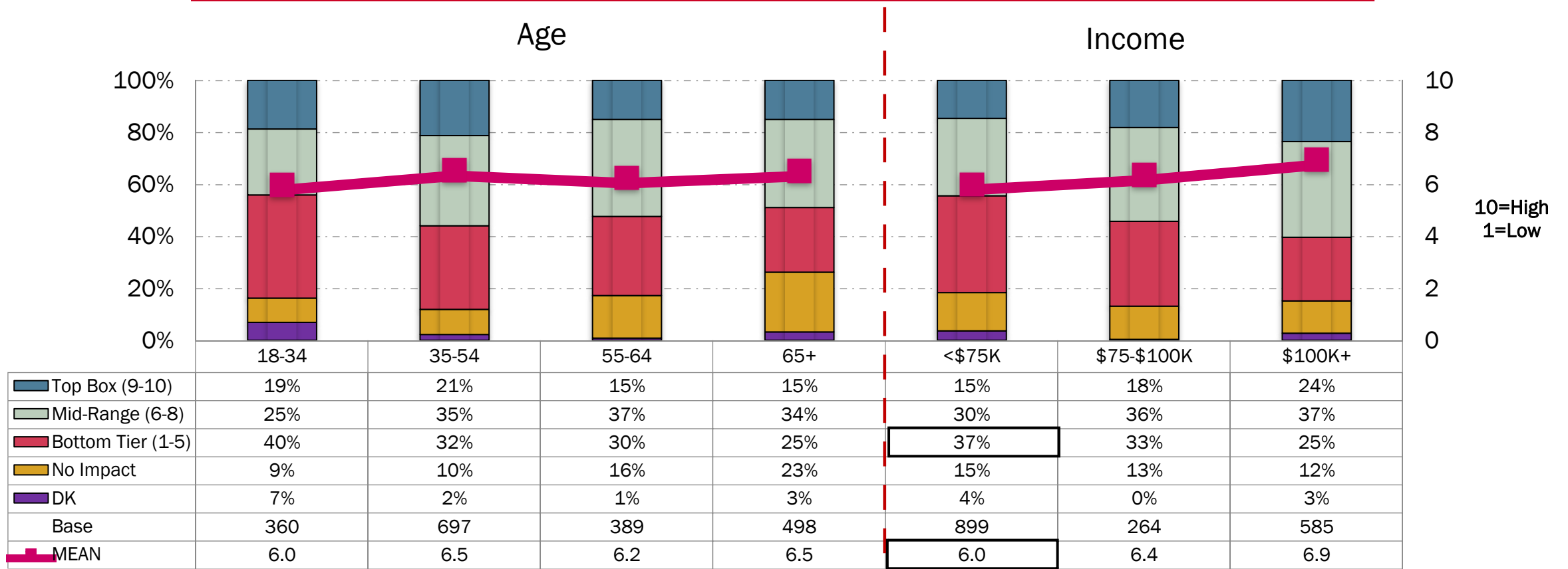
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



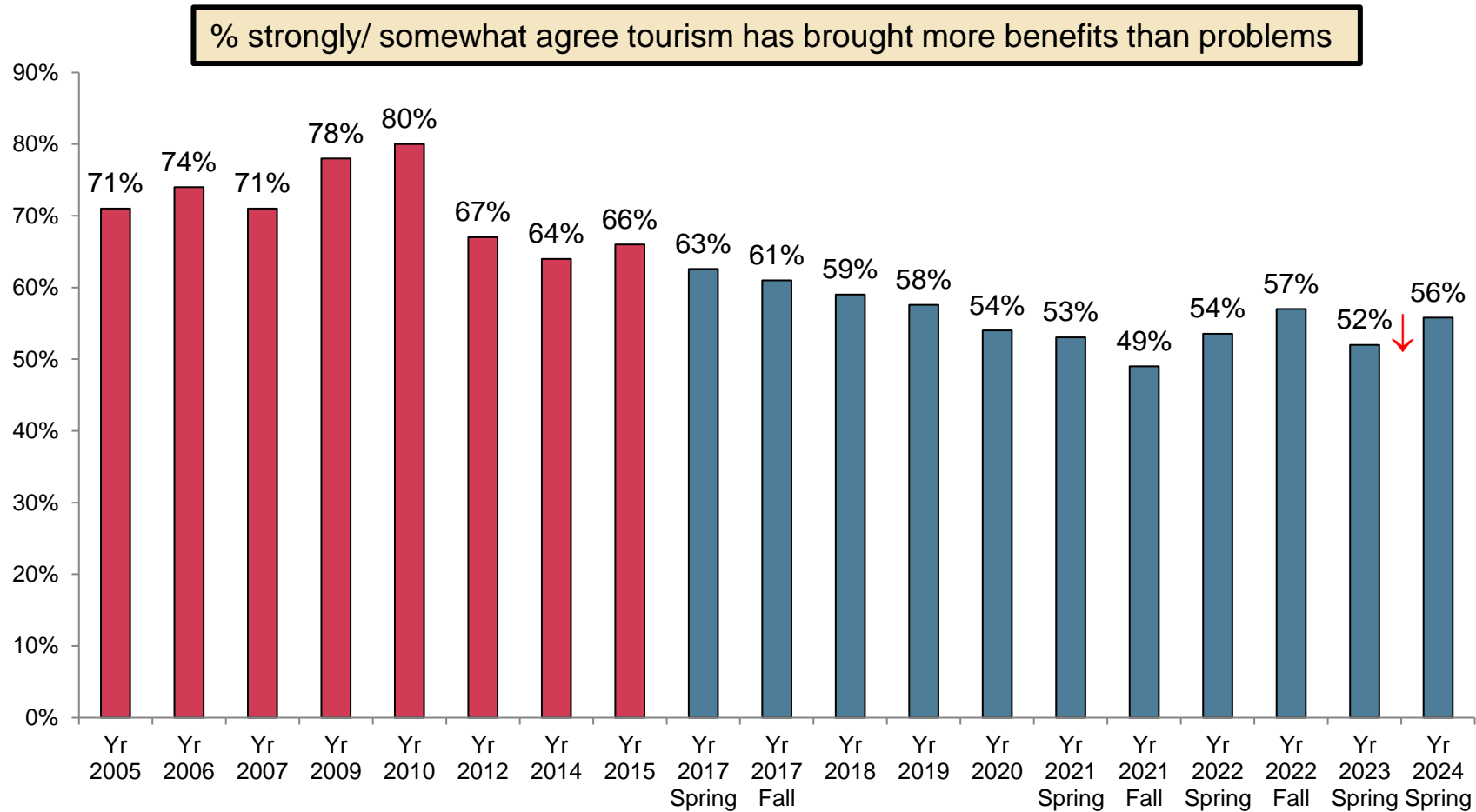
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



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

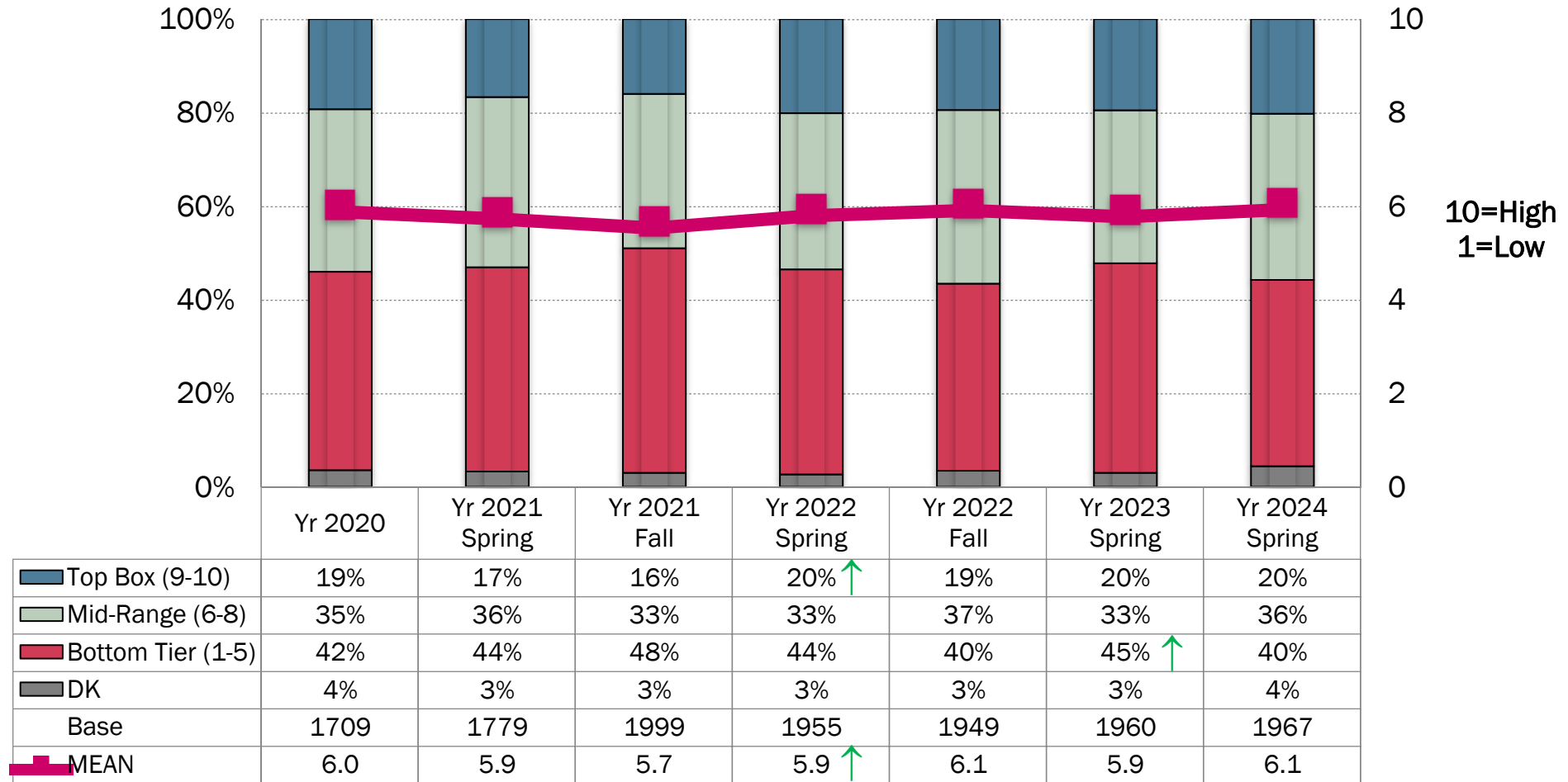
“Tourism has brought more benefits than problems” – *Overall Trend*



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

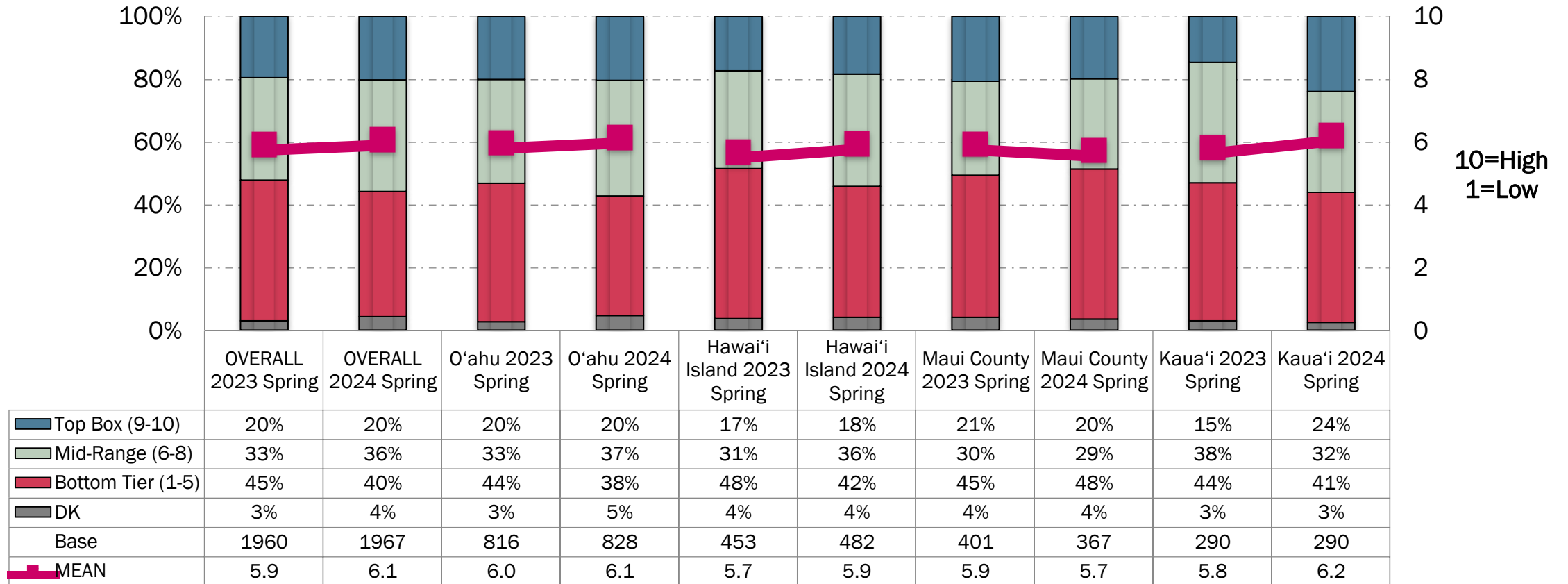
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – Overall



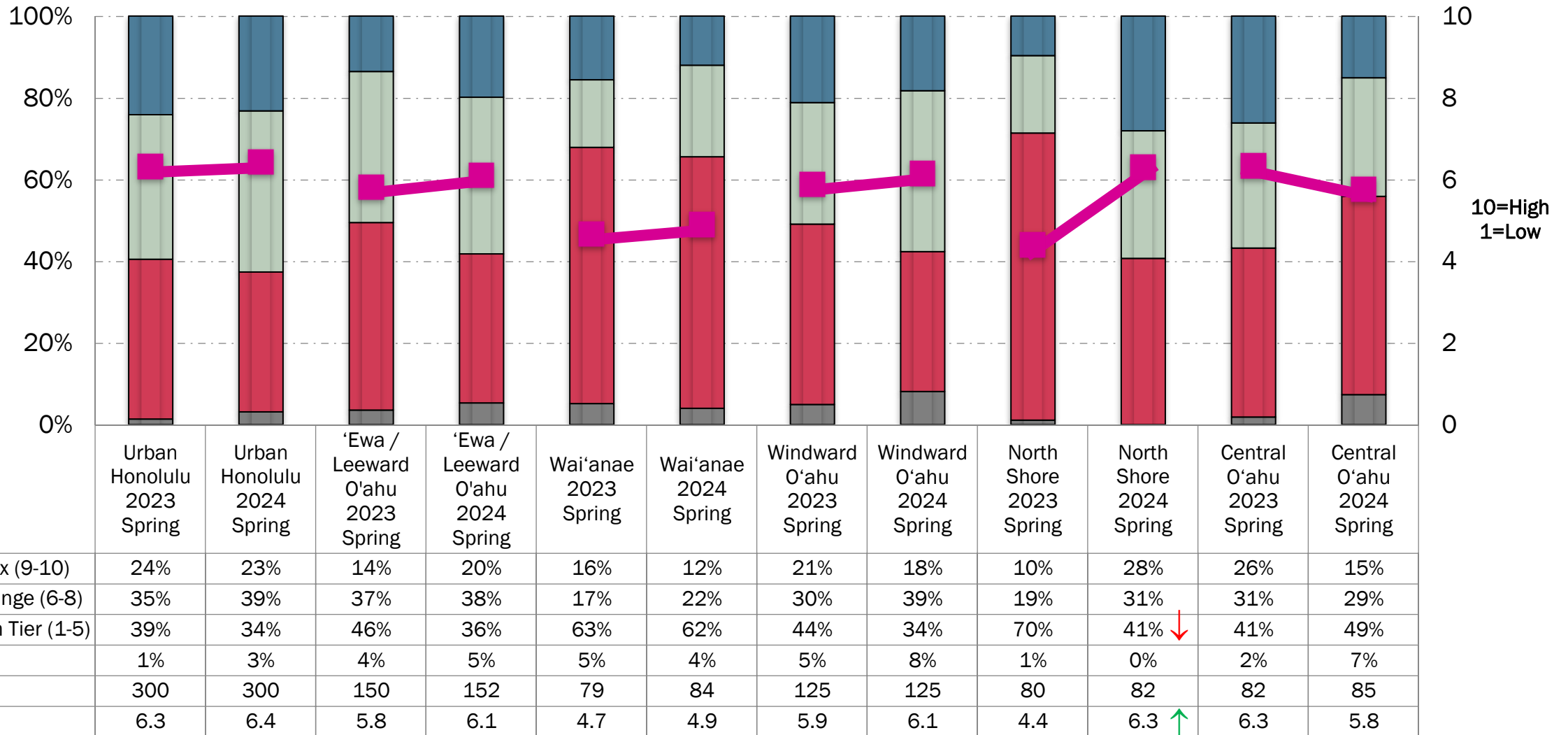
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

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



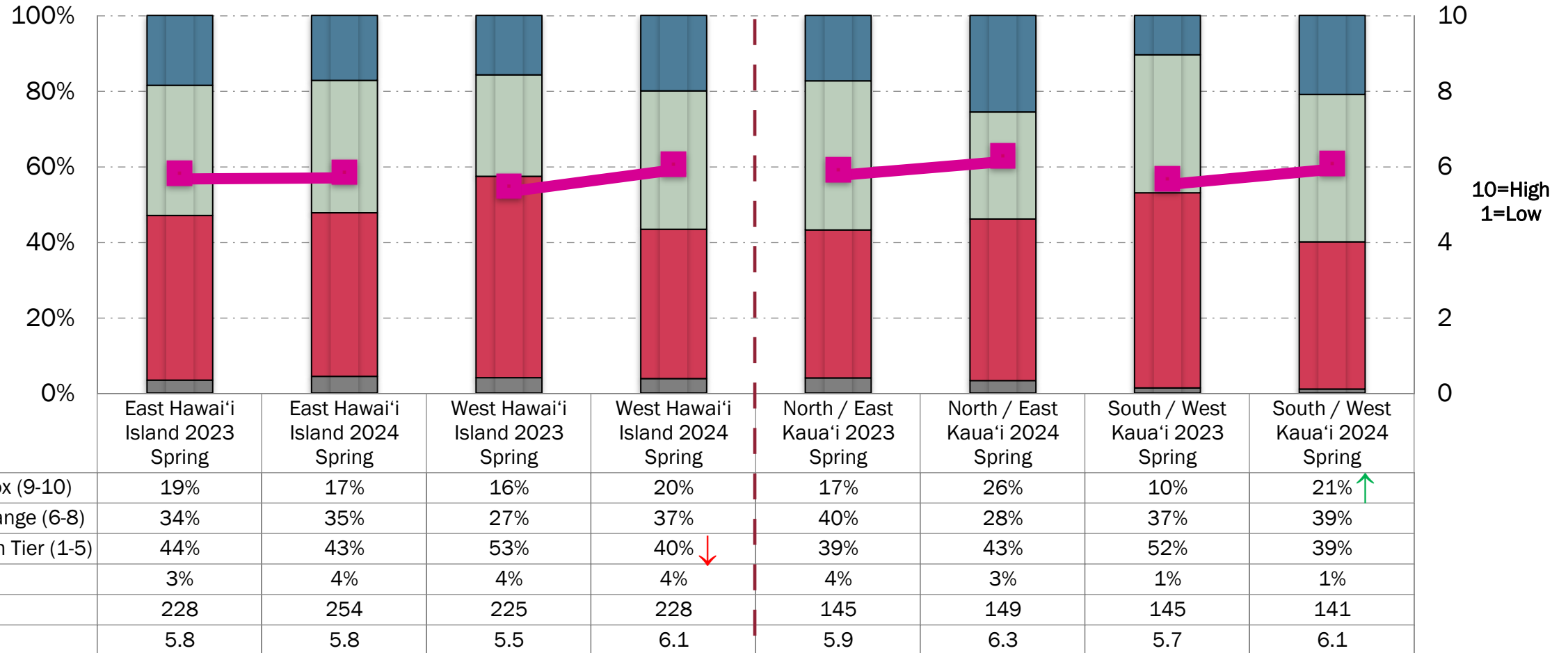
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – By Area (Maui County)



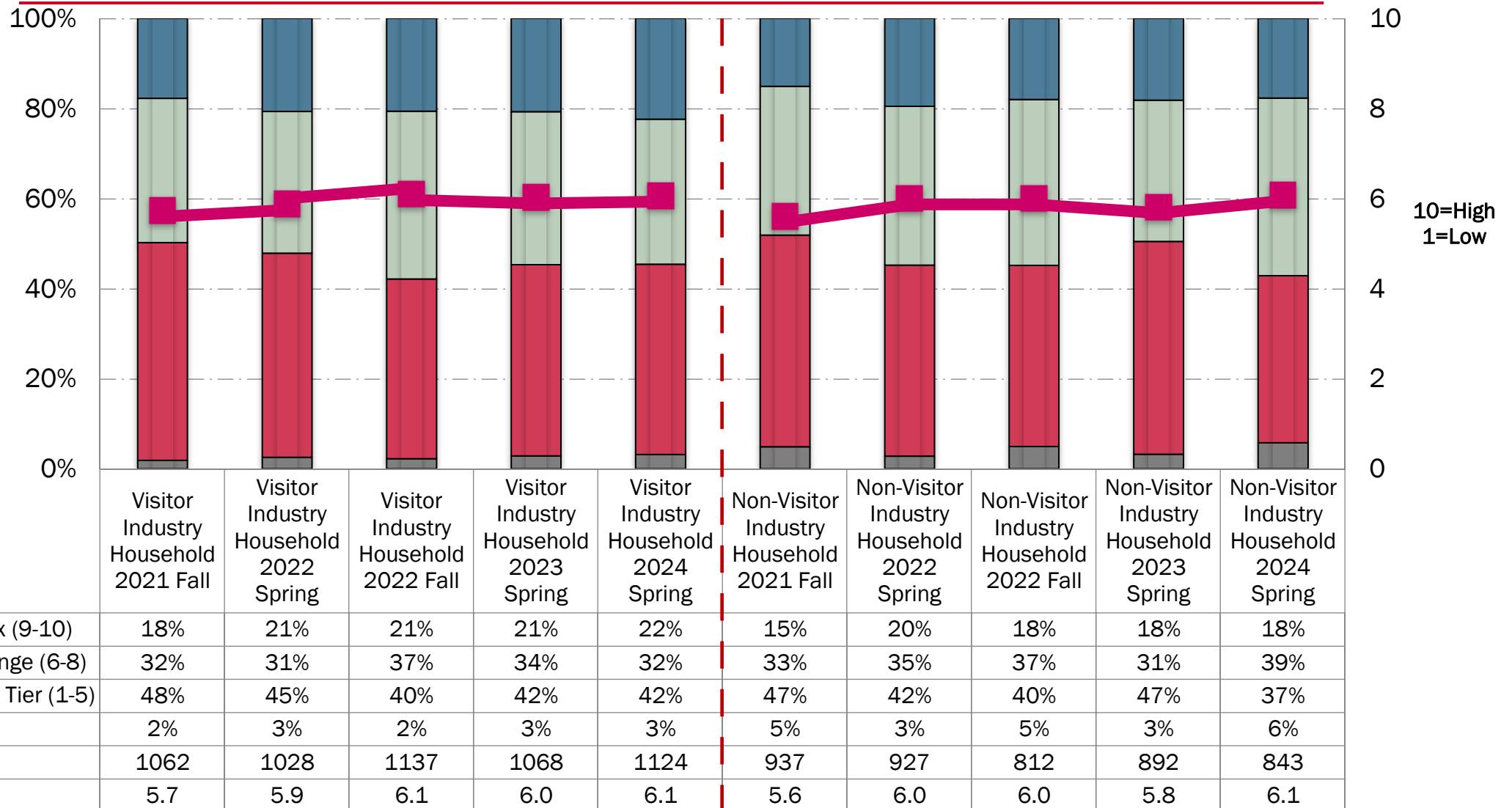
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



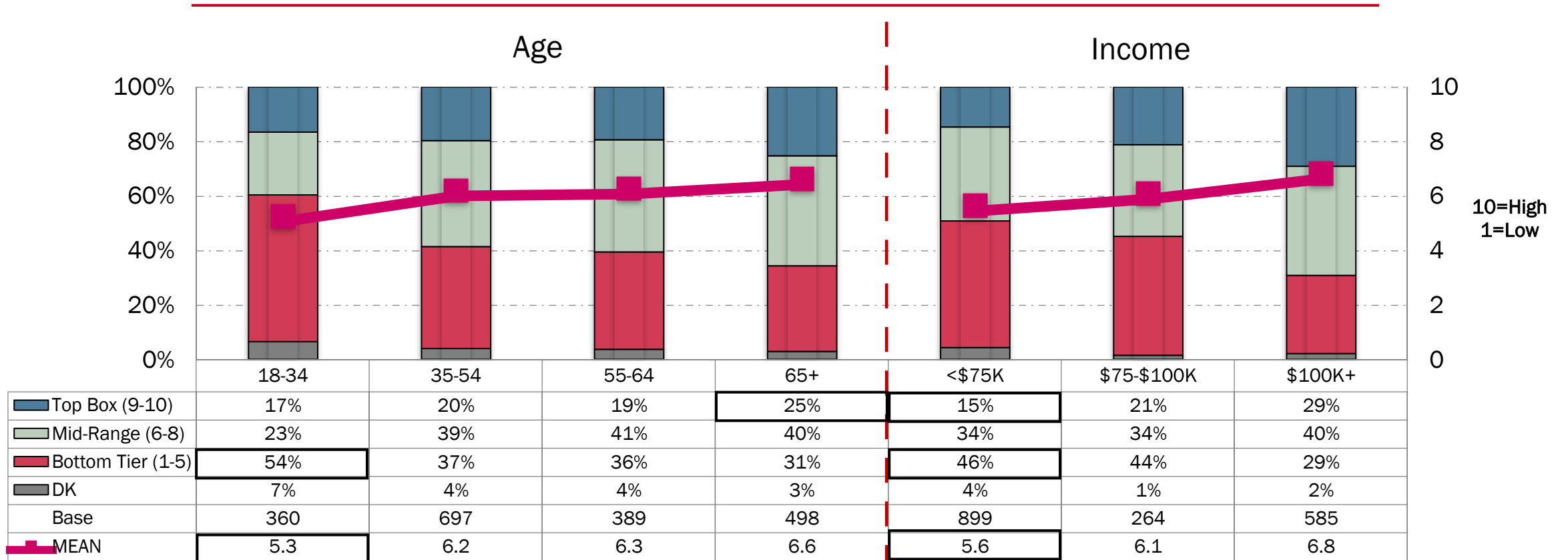
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

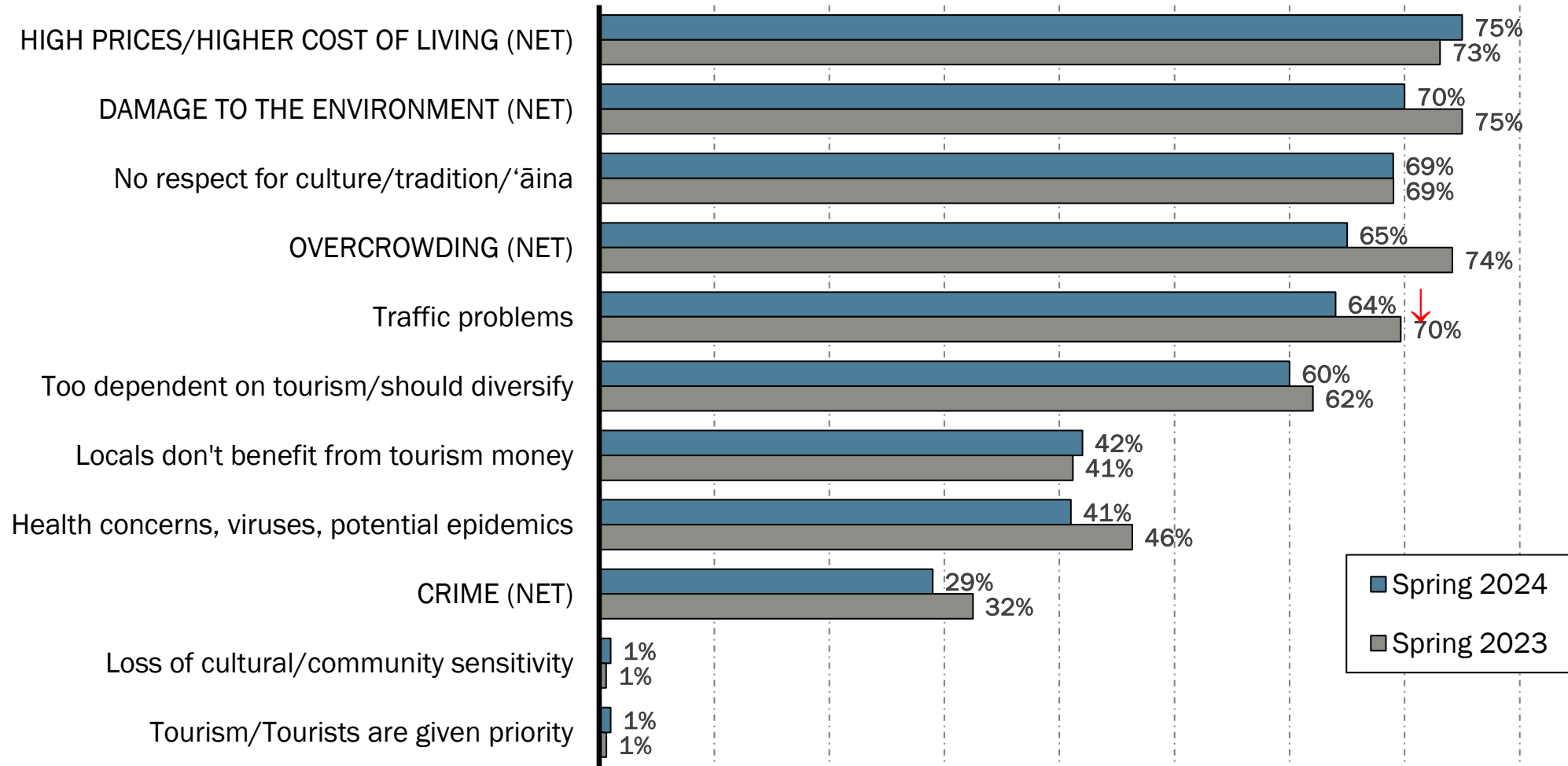
“Tourism has brought more benefits than problems” – *By Demographics*



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

Problems Created by Tourism in Hawai'i (Trends Spring 2023-2024)

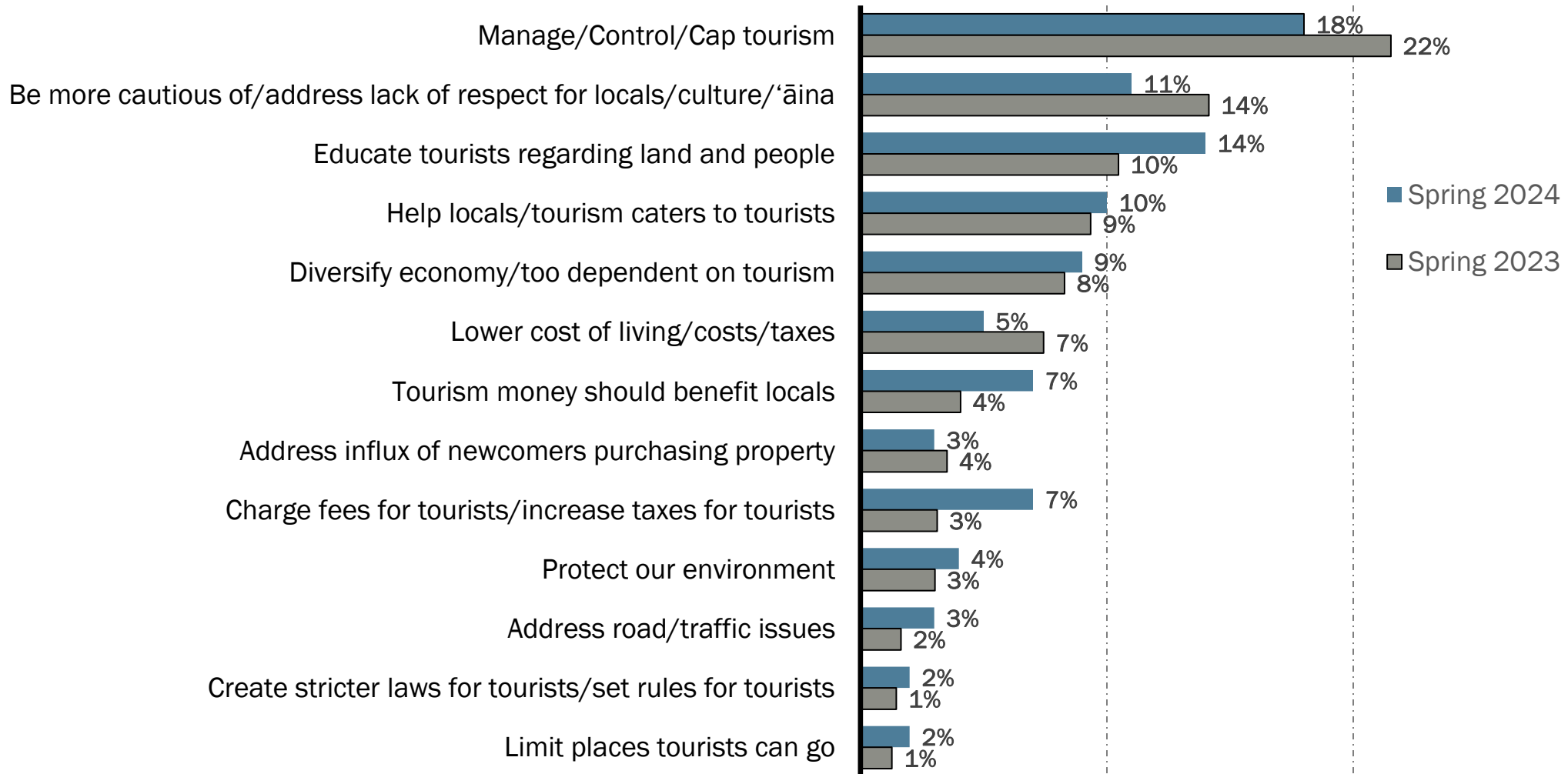
(According to residents saying Hawai'i tourism creates more **problems** than benefits)



Base: Spring 2023 (902), Spring 2024 (821).
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Opportunities for Improving Opinion of Tourism (Spring 2023-2024)

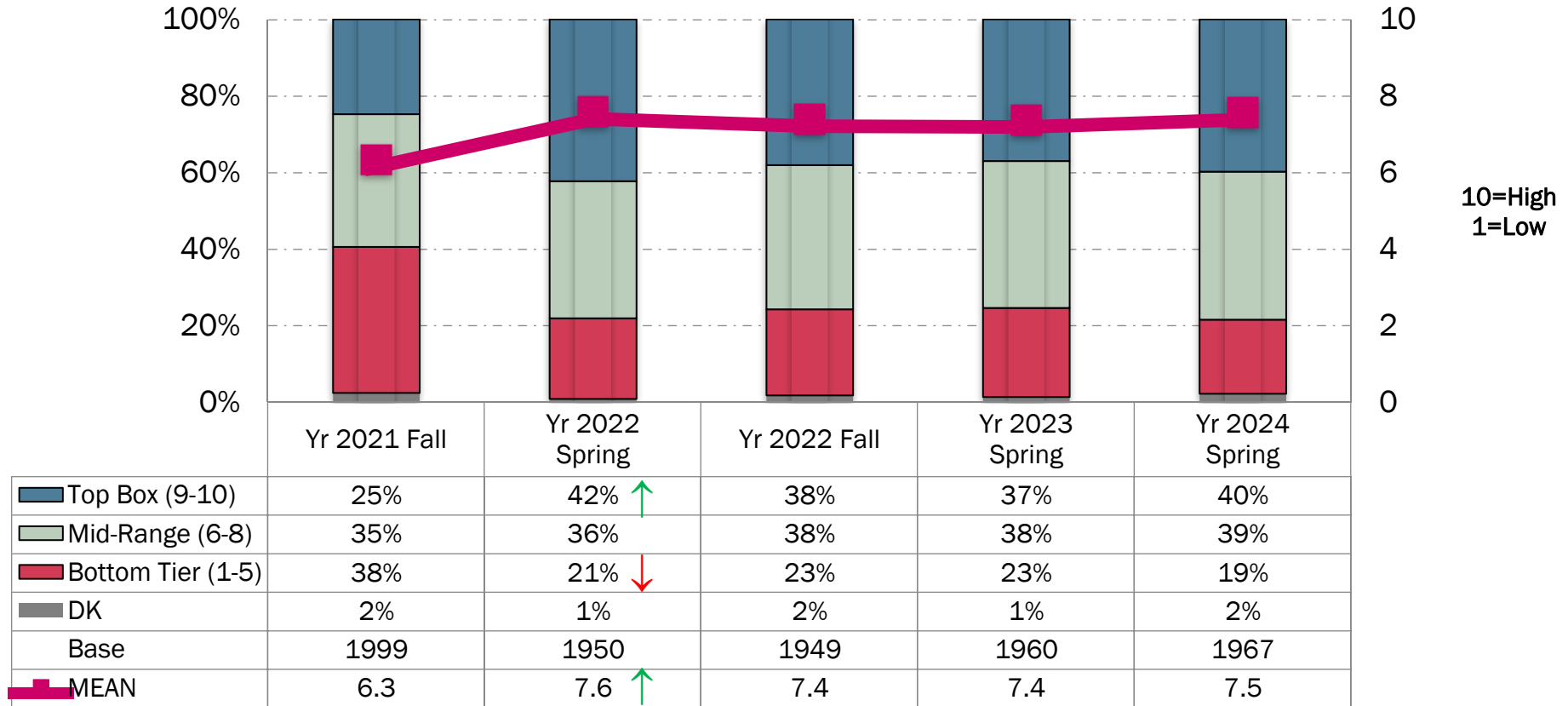
(According to residents **not** favorable toward tourism in Hawai'i)



Base: Spring 2023 (623), Spring 2024 (579)

Q6a. You said that you do not have a favorable opinion of tourism. What would it take to improve your opinion? Anything else?

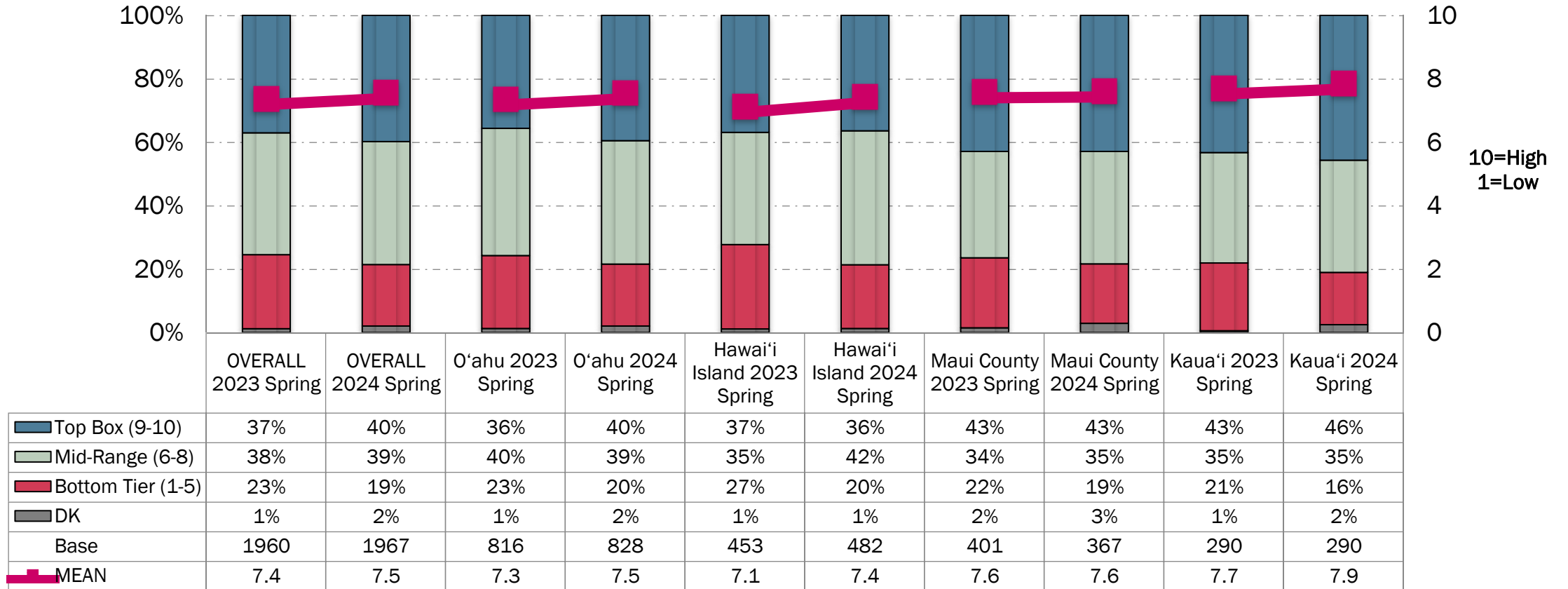
“Creates job opportunities for residents”* - Overall



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

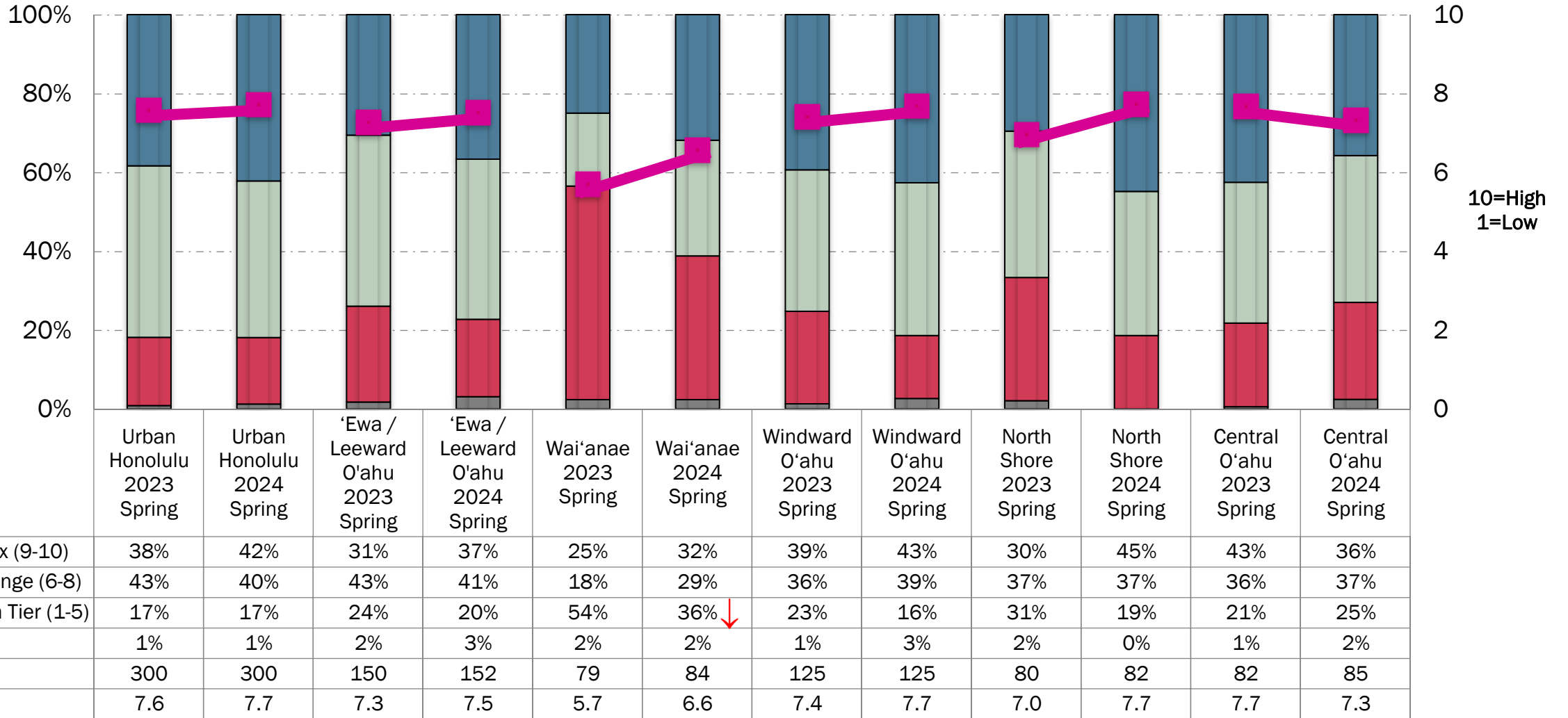
*Note: Changed in Spring 2022 fielding from “Tourism creates many well-paying jobs for residents.”

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



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

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



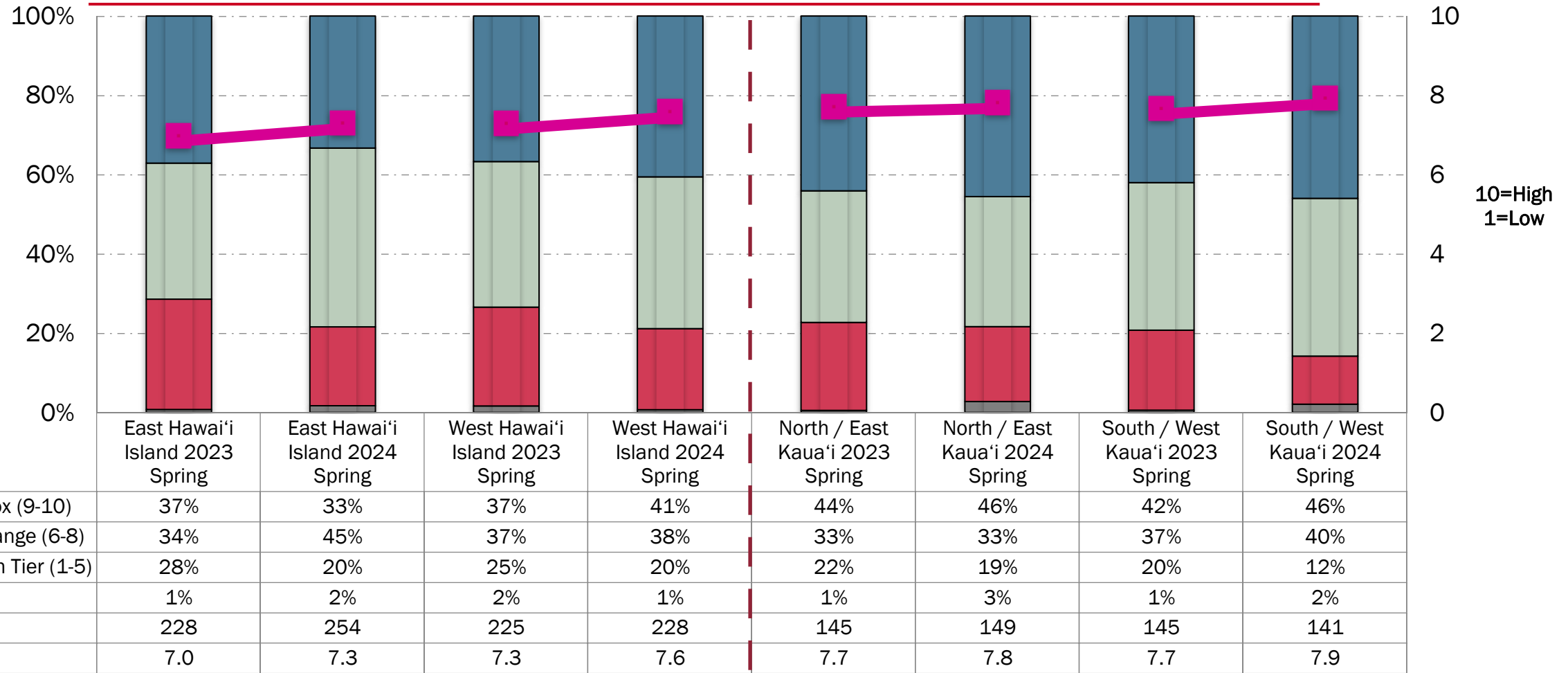
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



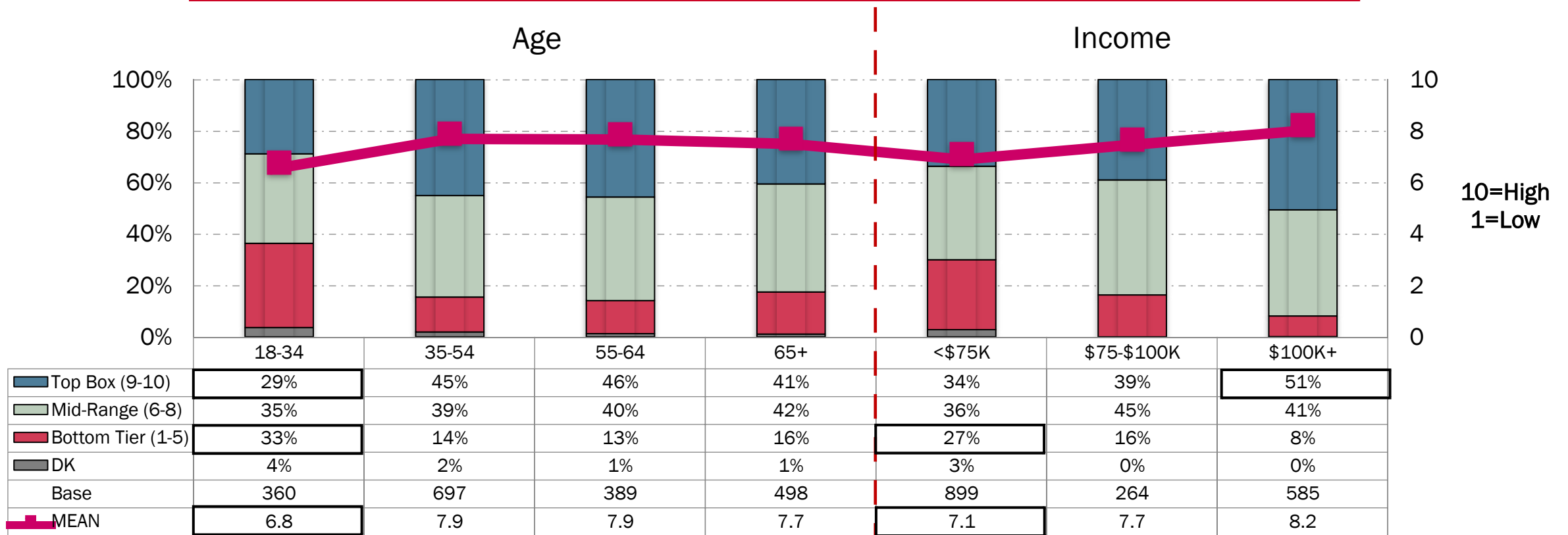
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



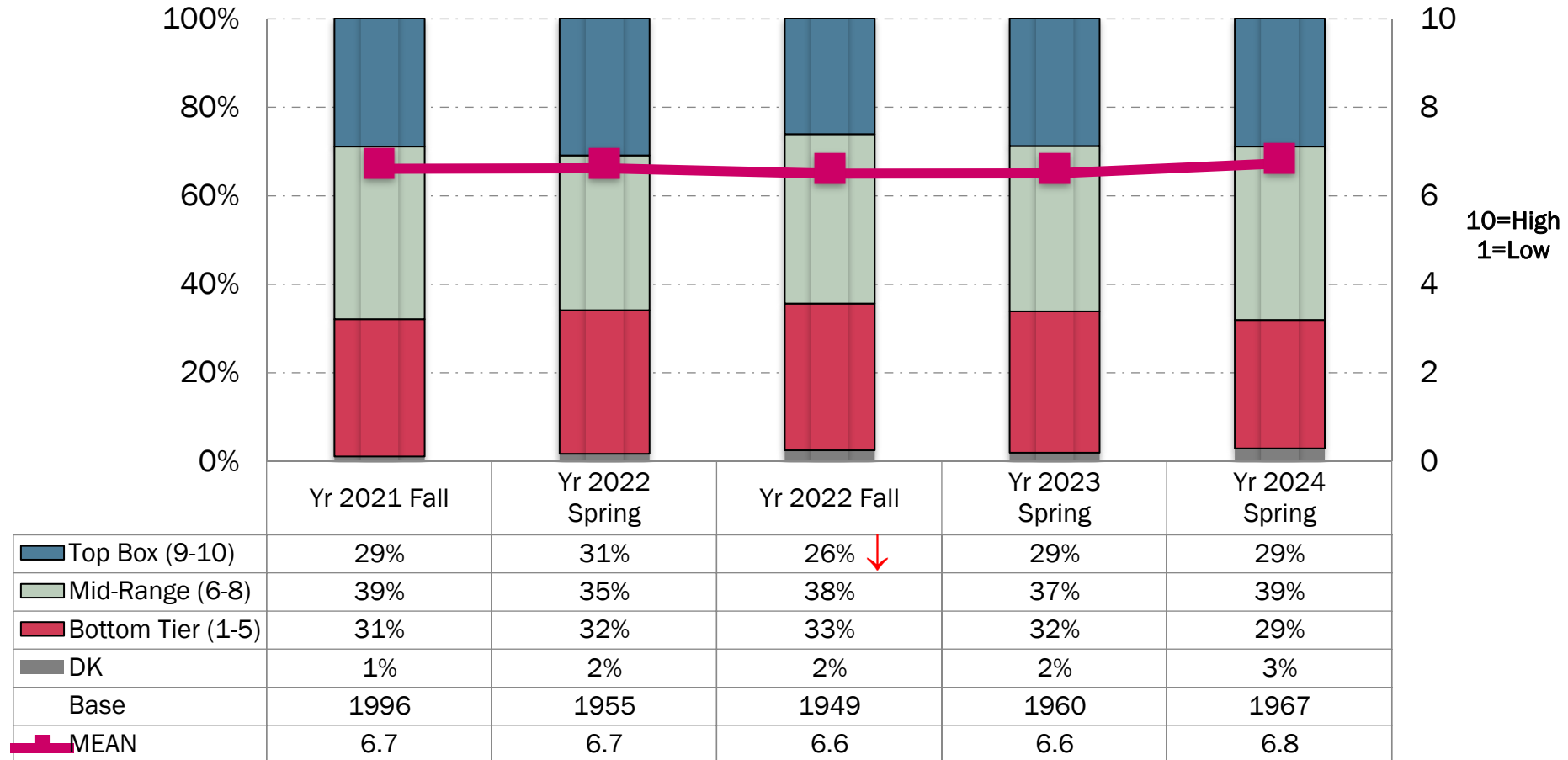
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



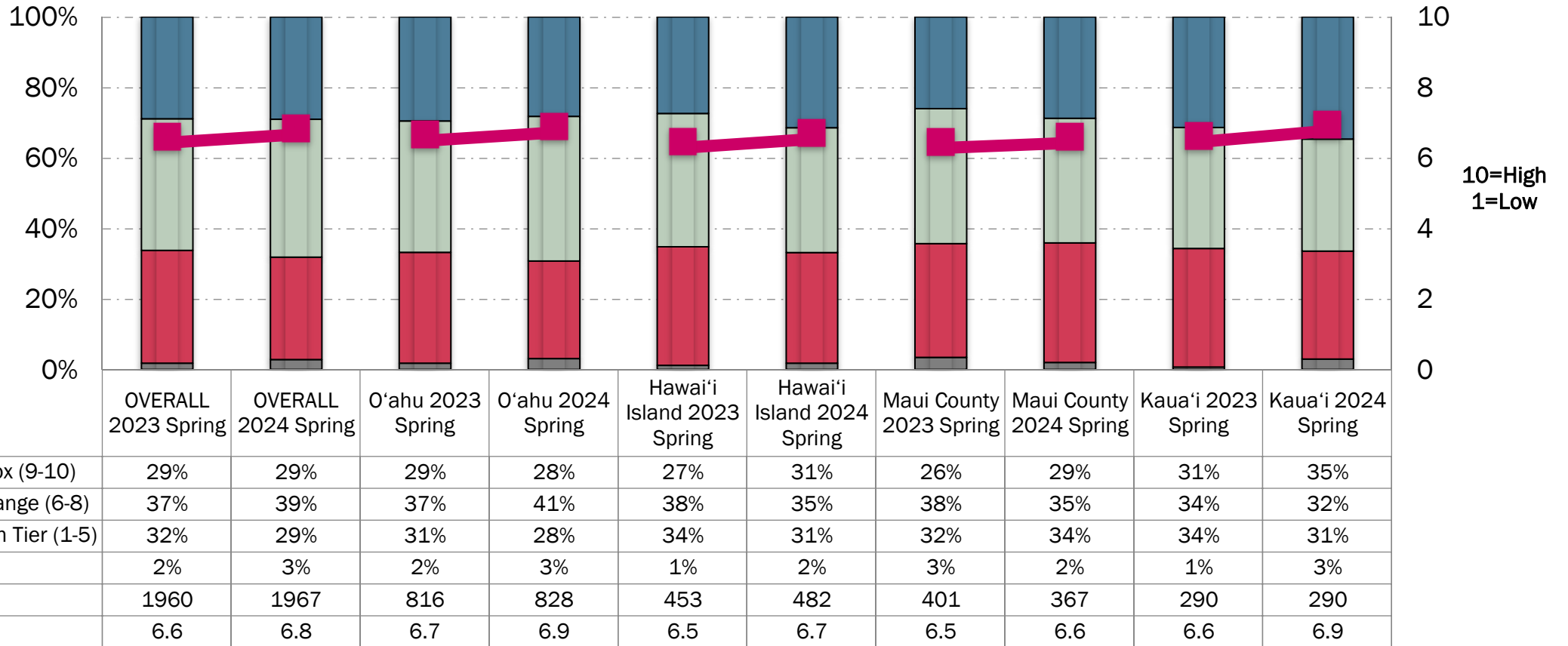
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



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

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



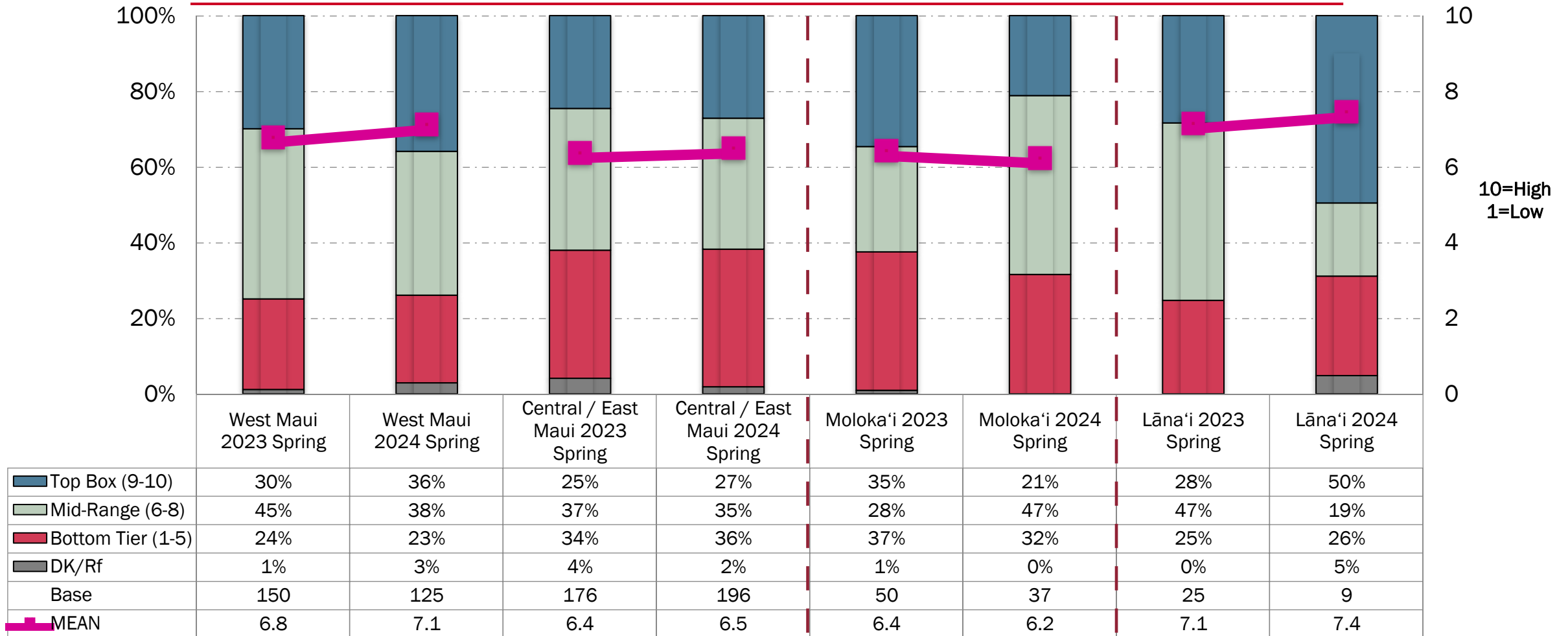
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



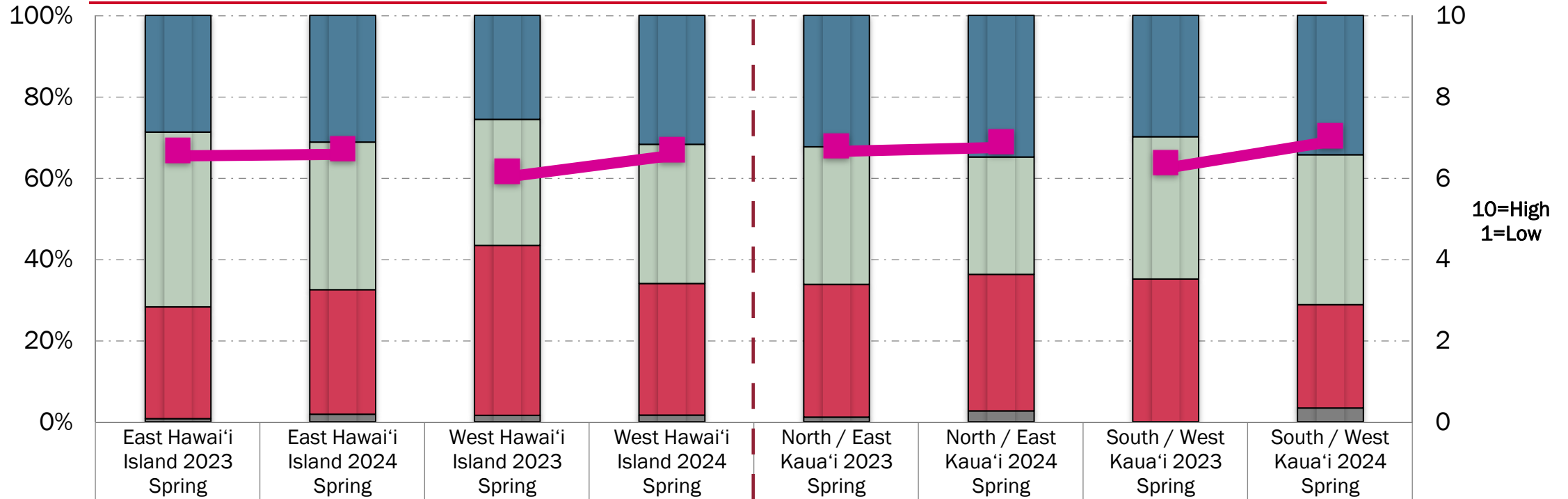
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

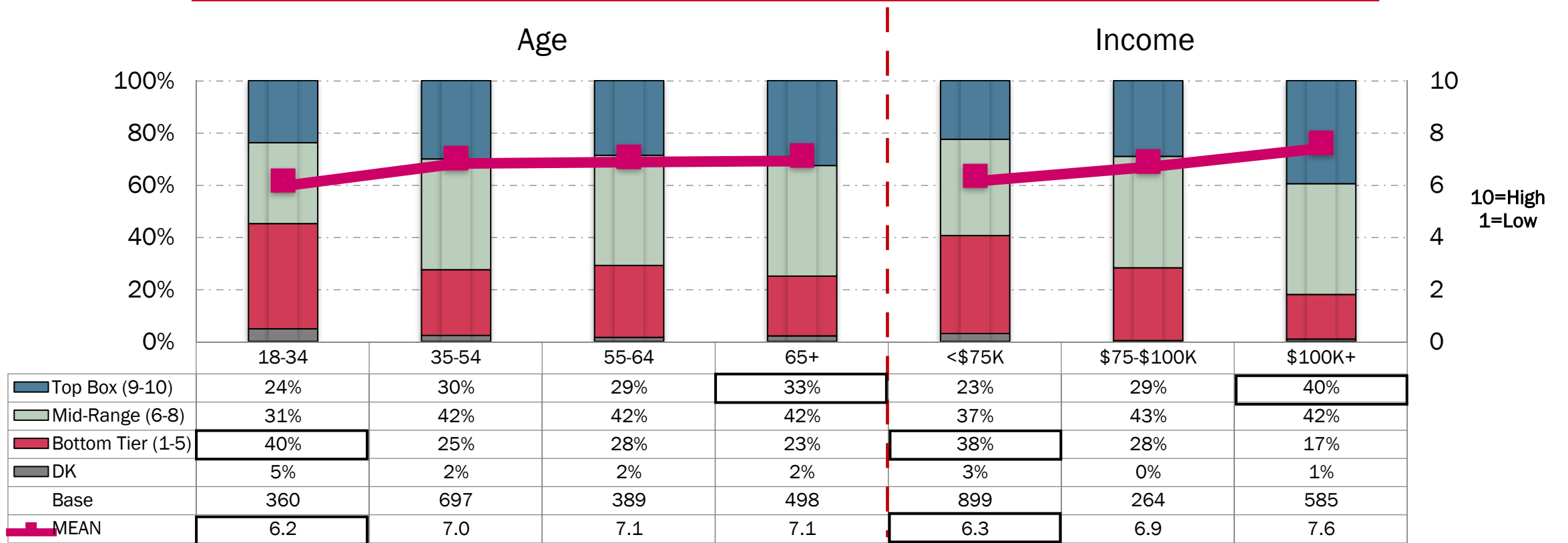
“Creates shopping, dining, and entertainment opportunities for residents” – *By Area (Hawai'i Island & Kaua'i)*



	East Hawai'i Island 2023 Spring	East Hawai'i Island 2024 Spring	West Hawai'i Island 2023 Spring	West Hawai'i Island 2024 Spring	North / East Kaua'i 2023 Spring	North / East Kaua'i 2024 Spring	South / West Kaua'i 2023 Spring	South / West Kaua'i 2024 Spring
Top Box (9-10)	29%	31%	26%	32%	32%	35%	30%	34%
Mid-Range (6-8)	43%	36%	31%	34%	34%	29%	35%	37%
Bottom Tier (1-5)	27%	31%	42%	32%	33%	34%	35%	25%
DK/Rf	1%	2%	2%	2%	1%	3%	0%	3%
Base	228	254	225	228	145	149	145	141
MEAN	6.7	6.7	6.2	6.7	6.8	6.9	6.4	7.0

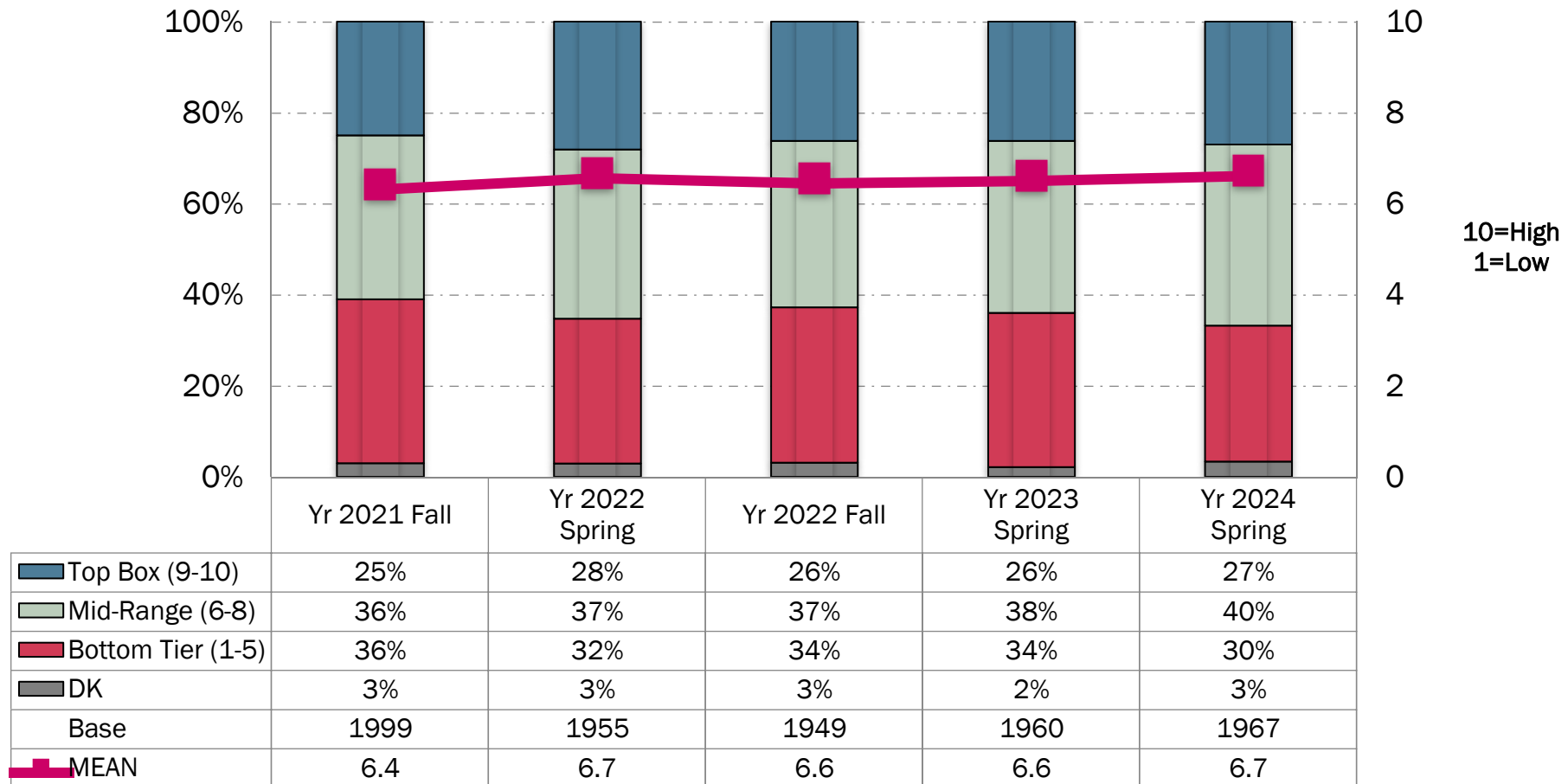
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



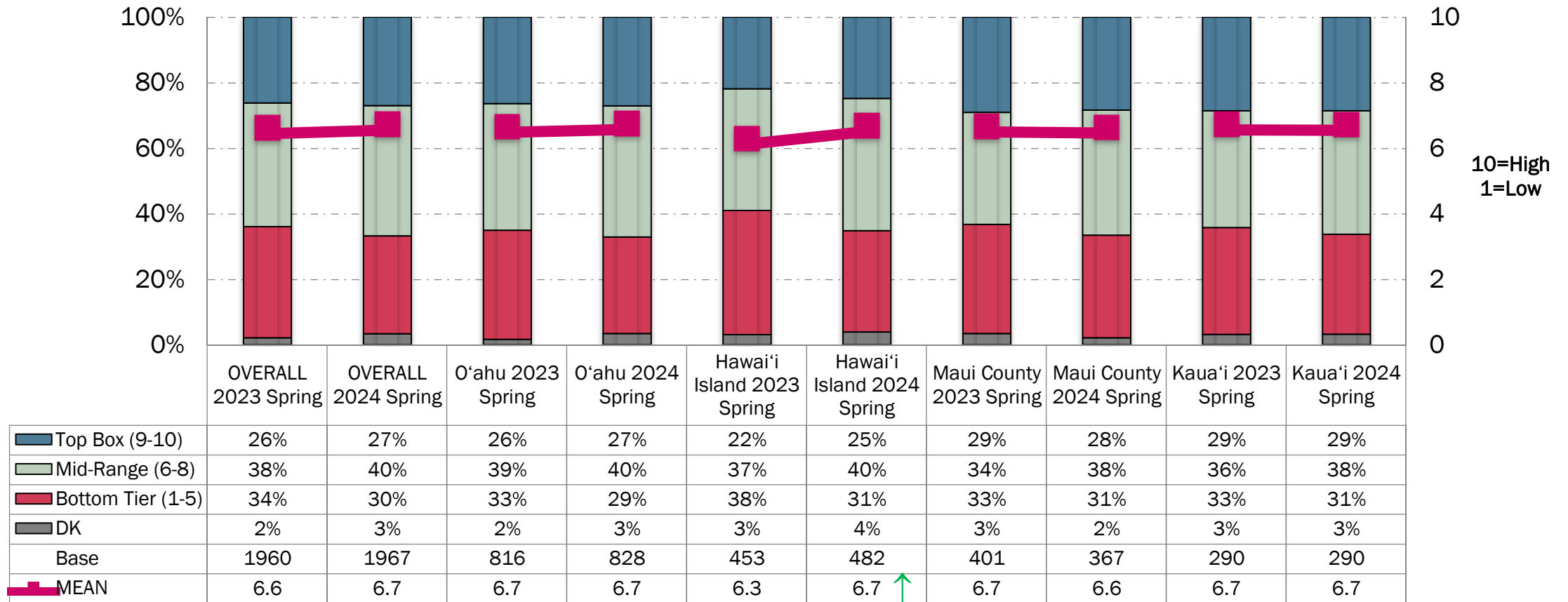
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Creates job opportunities with paths for advancement” - Overall



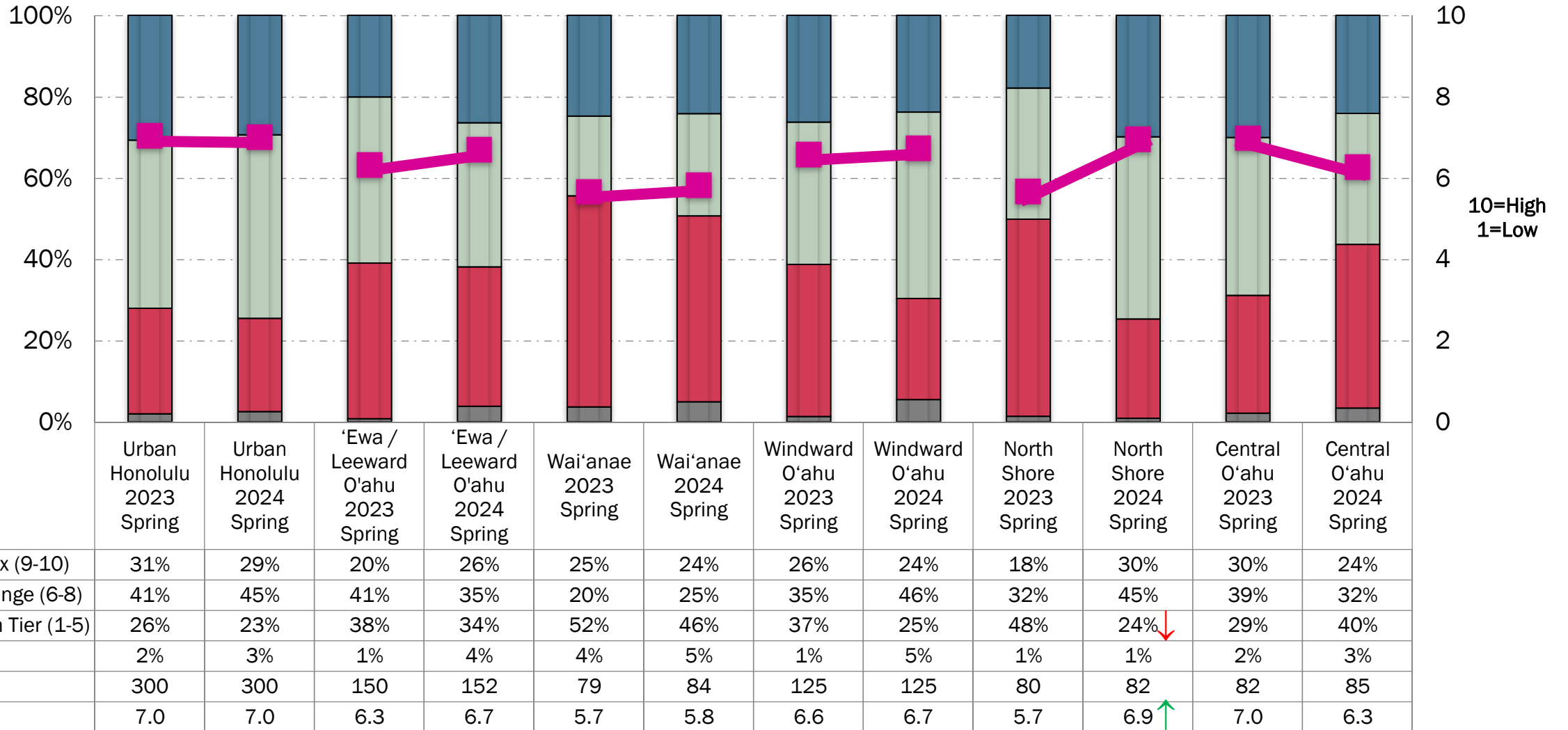
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“Creates job opportunities with paths for advancement” – *By County*

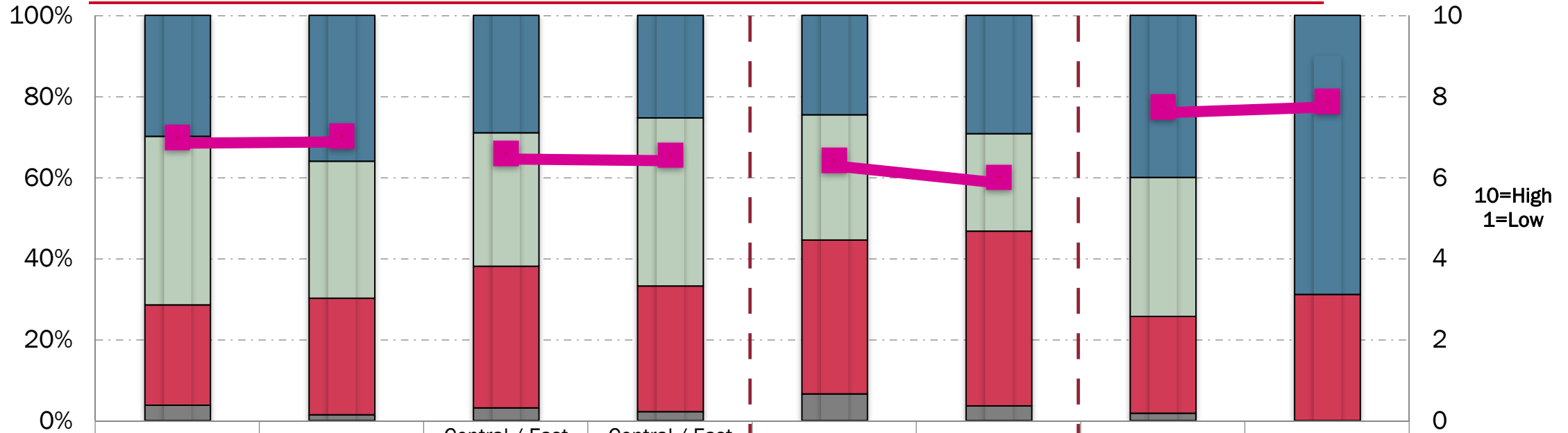


Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



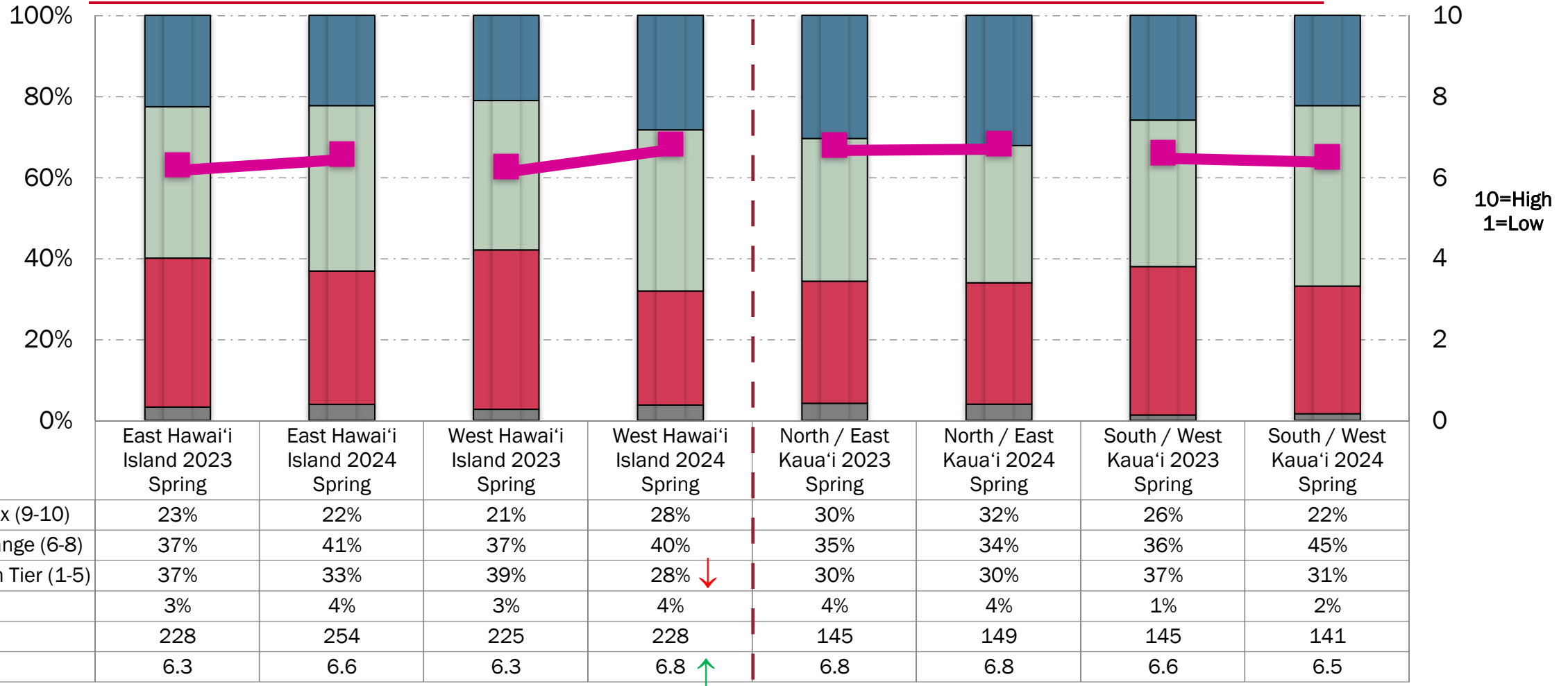
“Creates job opportunities with paths for advancement” – By Area (Maui County)



	West Maui 2023 Spring	West Maui 2024 Spring	Central / East Maui 2023 Spring	Central / East Maui 2024 Spring	Moloka'i 2023 Spring	Moloka'i 2024 Spring	Lāna'i 2023 Spring	Lāna'i 2024 Spring
Top Box (9-10)	30%	36%	29%	25%	25%	29%	40%	69%
Mid-Range (6-8)	42%	34%	33%	41%	31%	24%	34%	0%
Bottom Tier (1-5)	25%	29%	35%	31%	38%	43%	24%	31%
DK/Rf	4%	1%	3%	2%	7%	4%	2%	0%
Base	150	125	176	196	50	37	25	9
MEAN	7.0	7.0	6.6	6.5	6.4	6.0	7.7	7.9

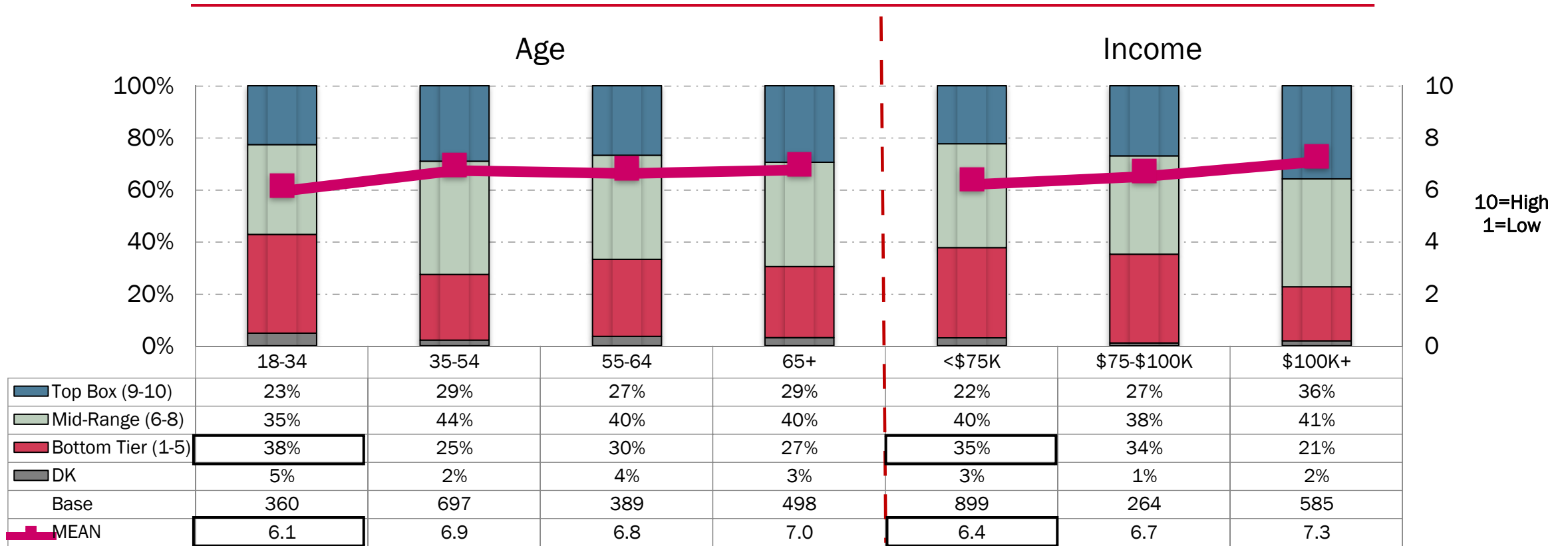
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



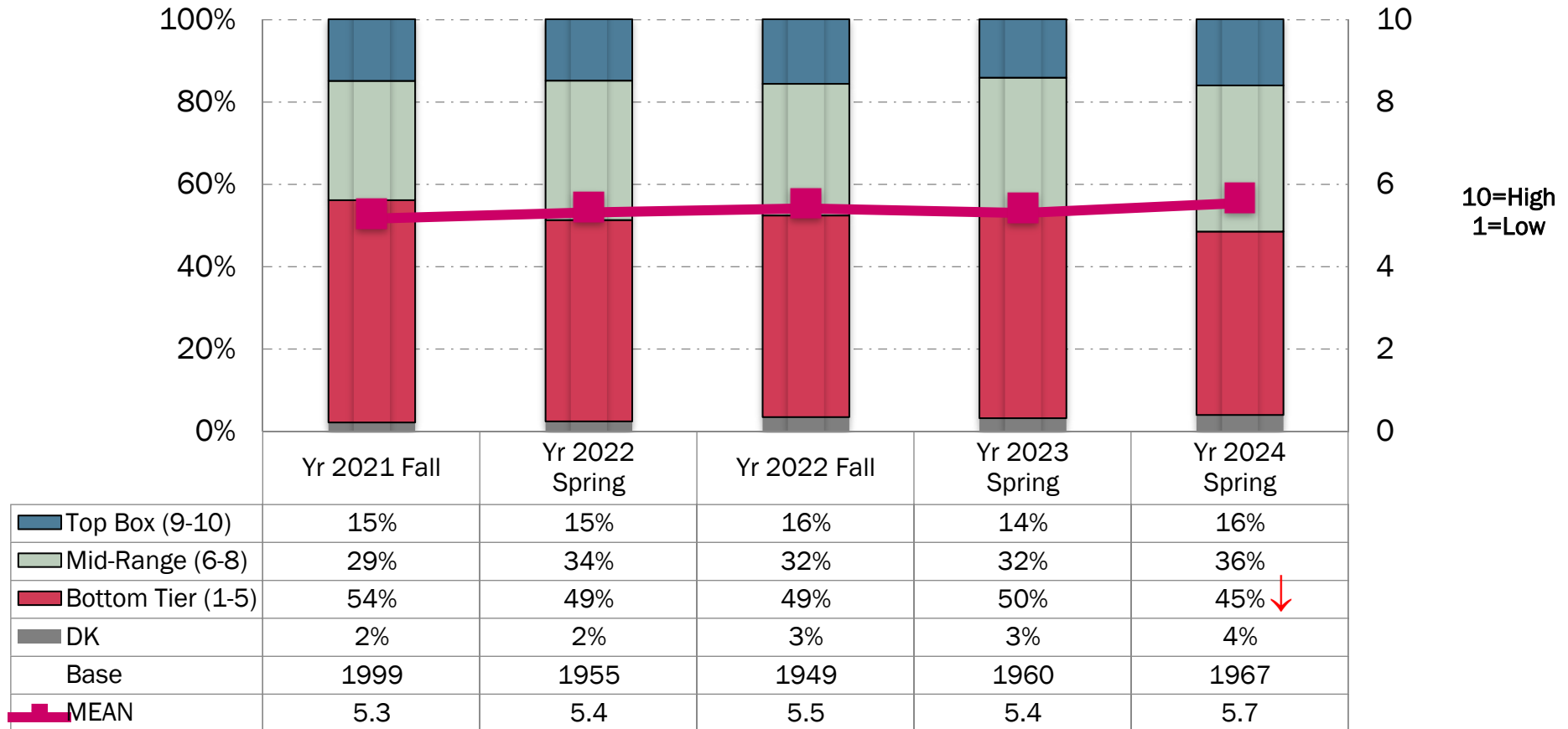
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



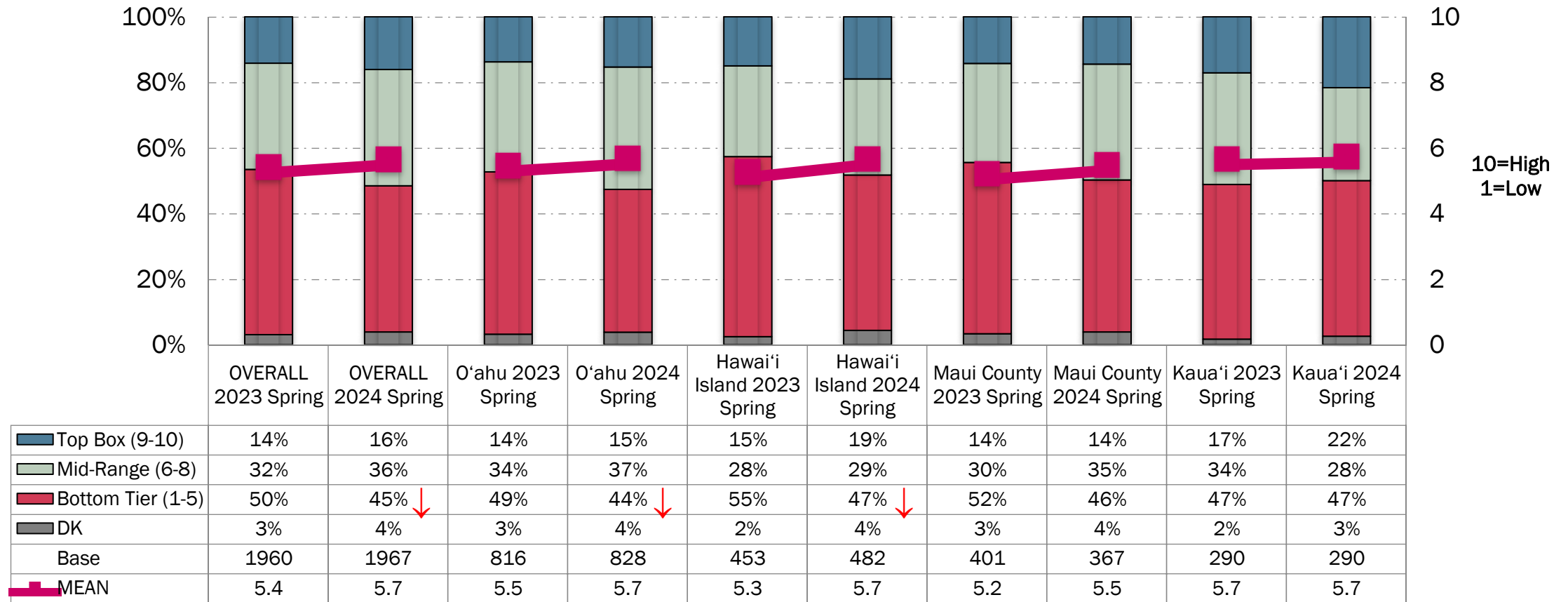
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



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

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



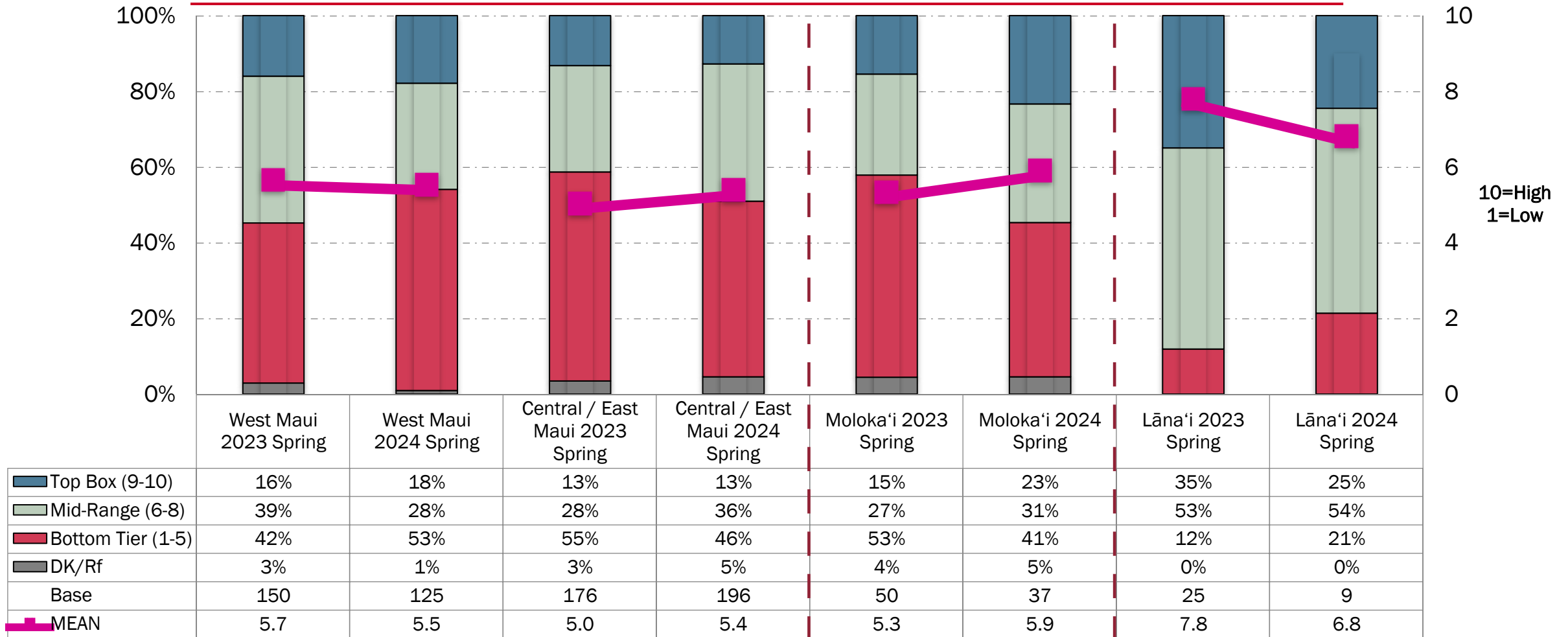
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

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



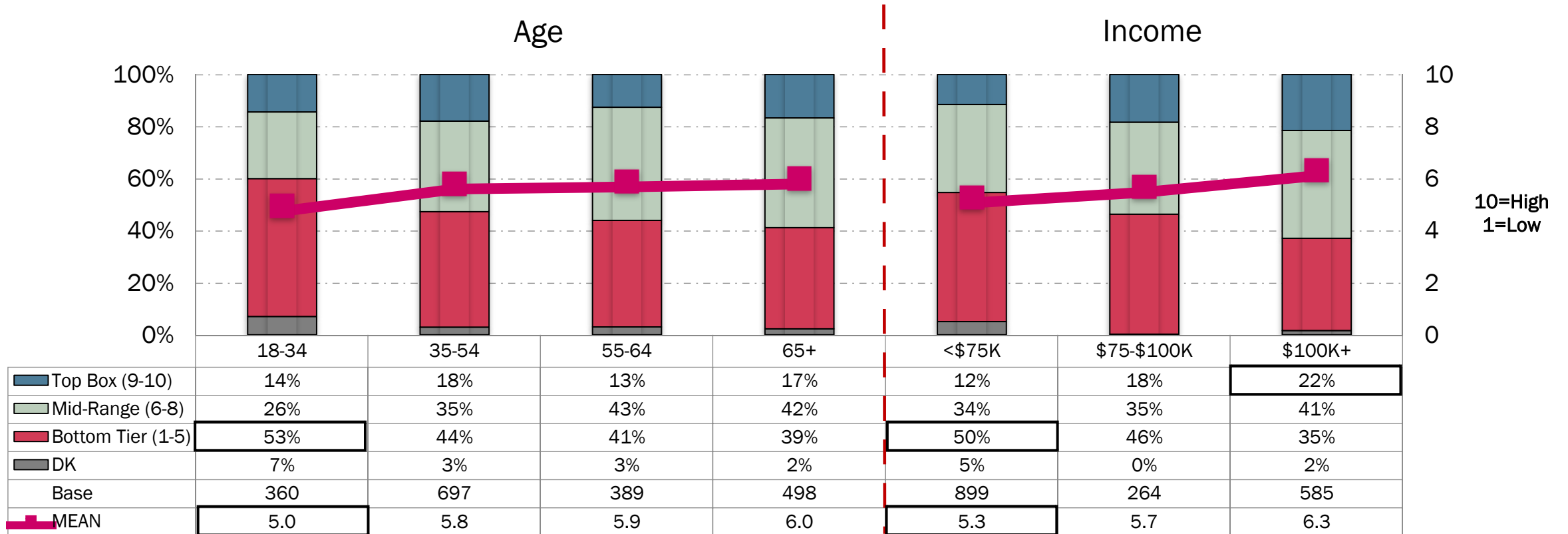
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



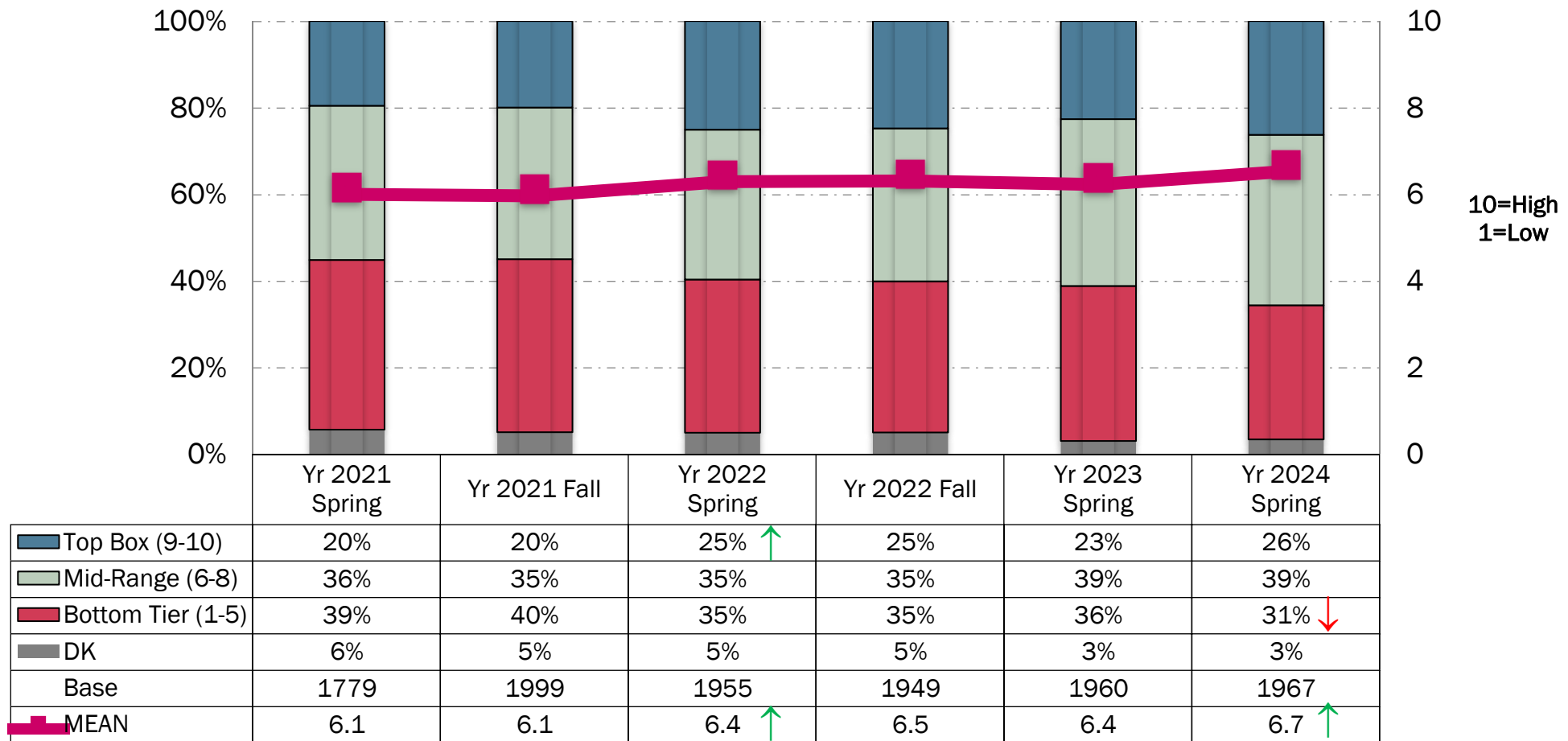
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



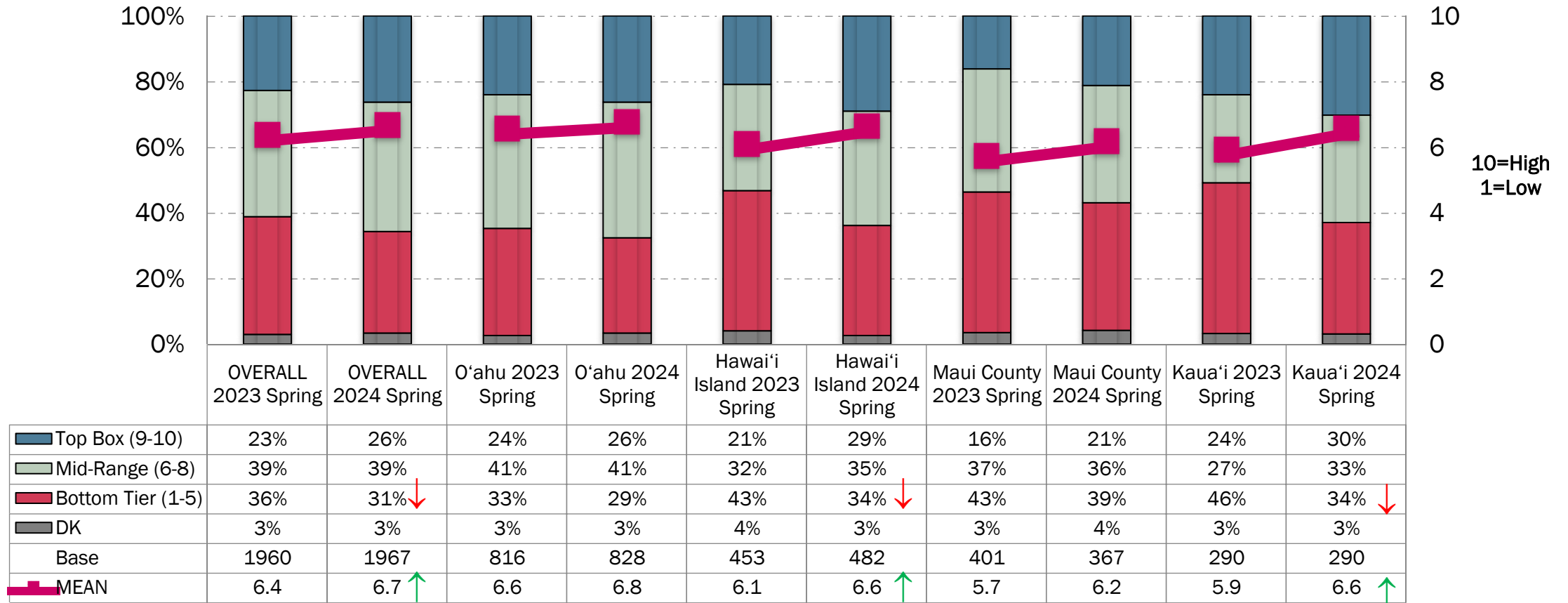
Q3.6. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



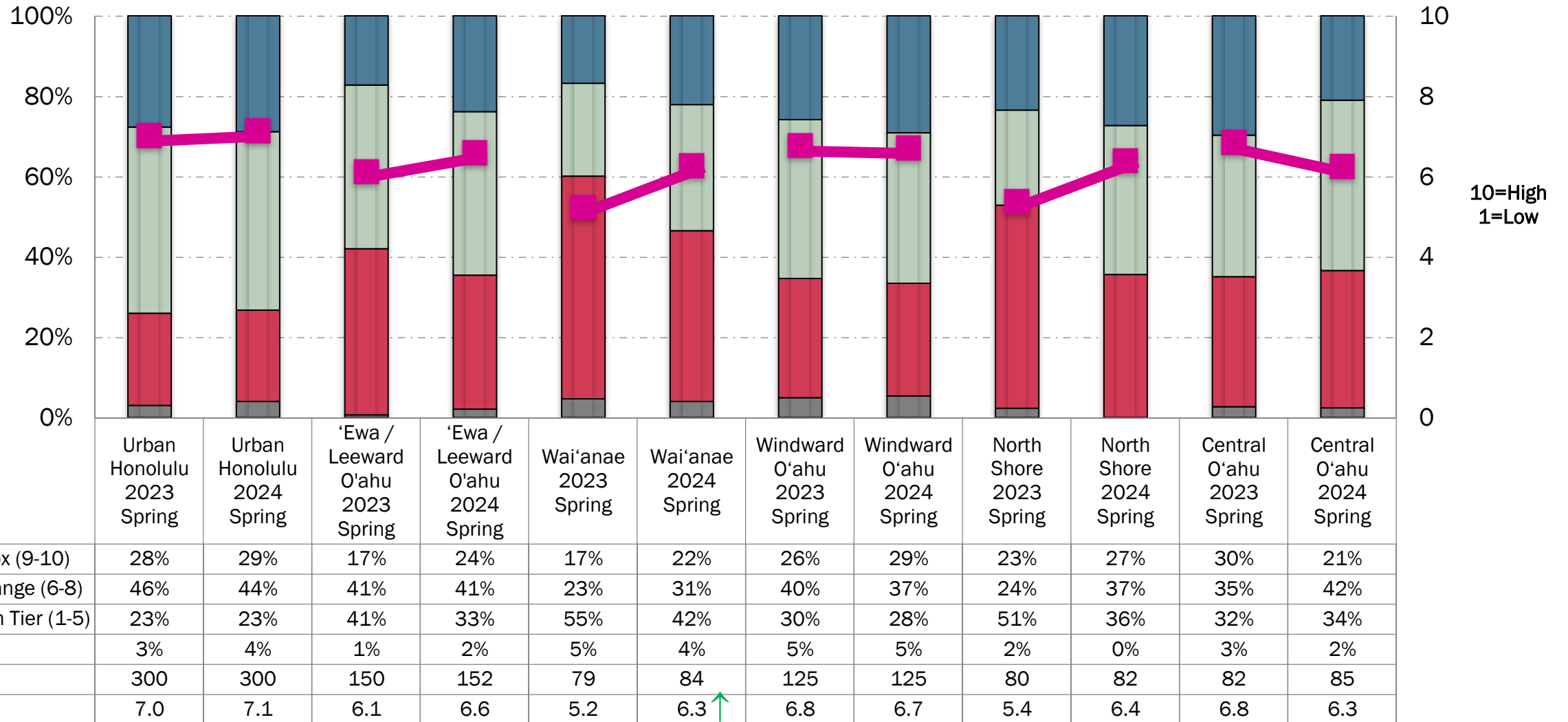
Q3.7. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



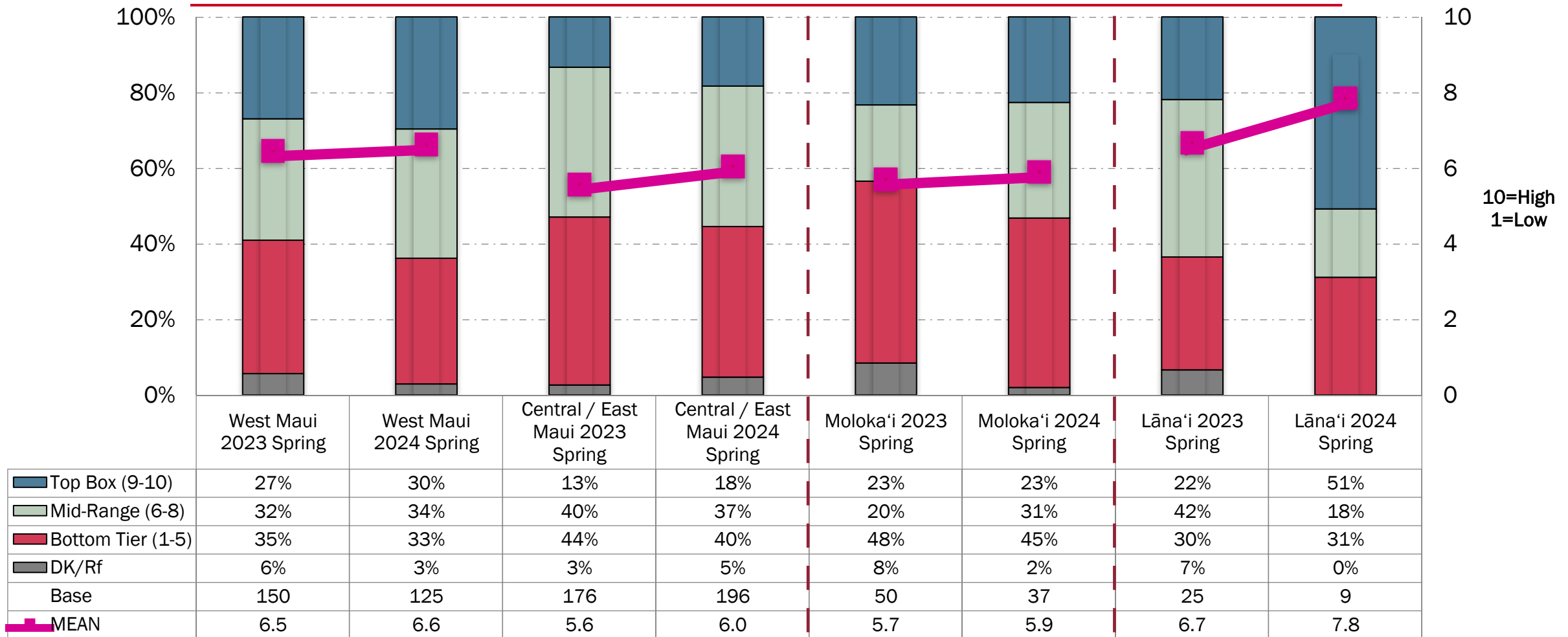
Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

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



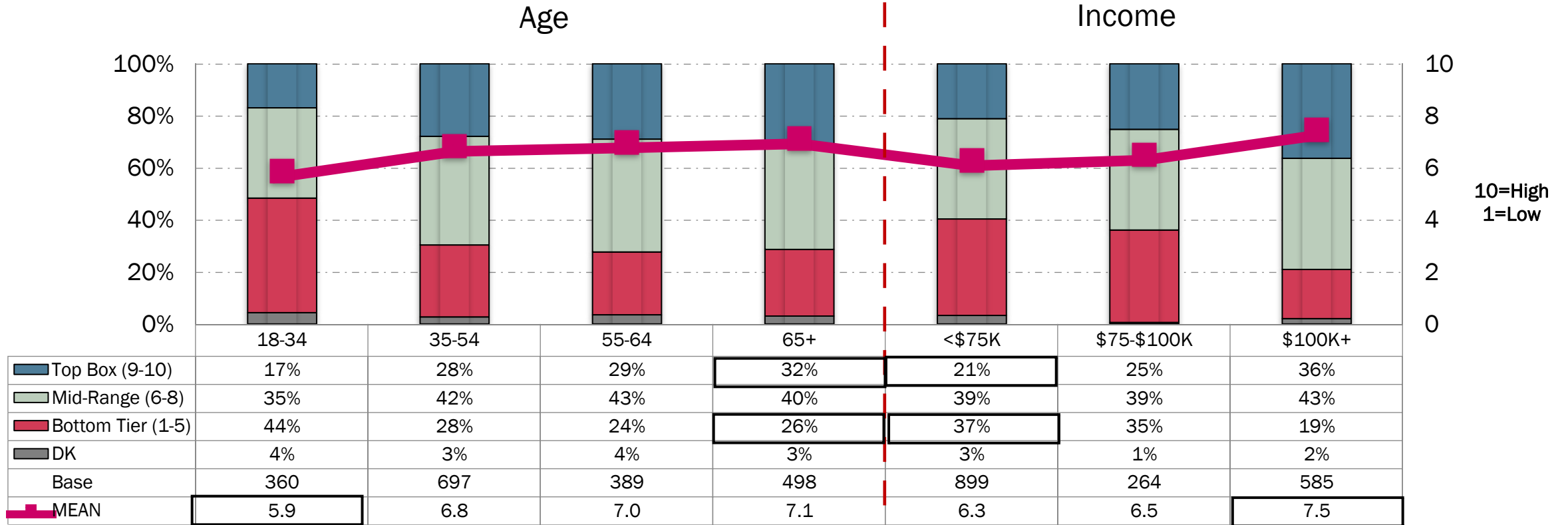
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“Sponsors festivals, activities, & sports events for residents & visitors” – By Area (Hawai'i Island & Kaua'i)



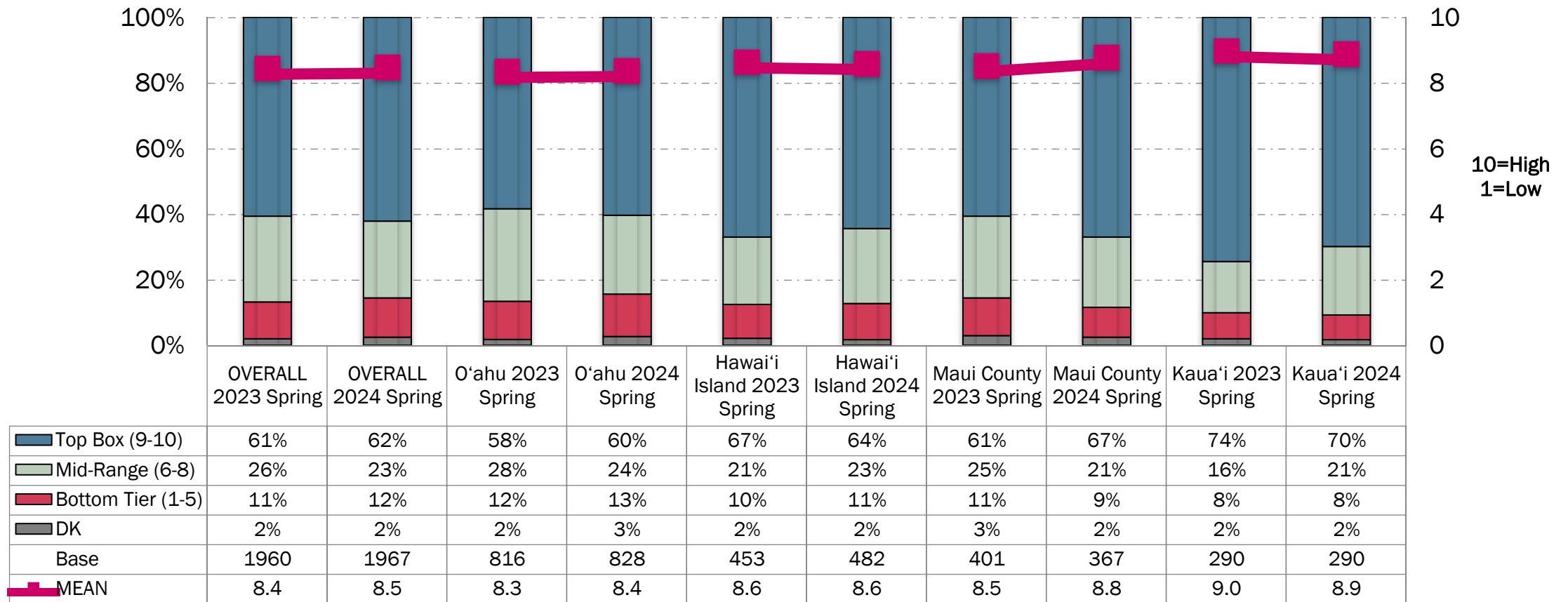
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“Sponsors festivals, activities, & sports events for residents & visitors” – By Demographics



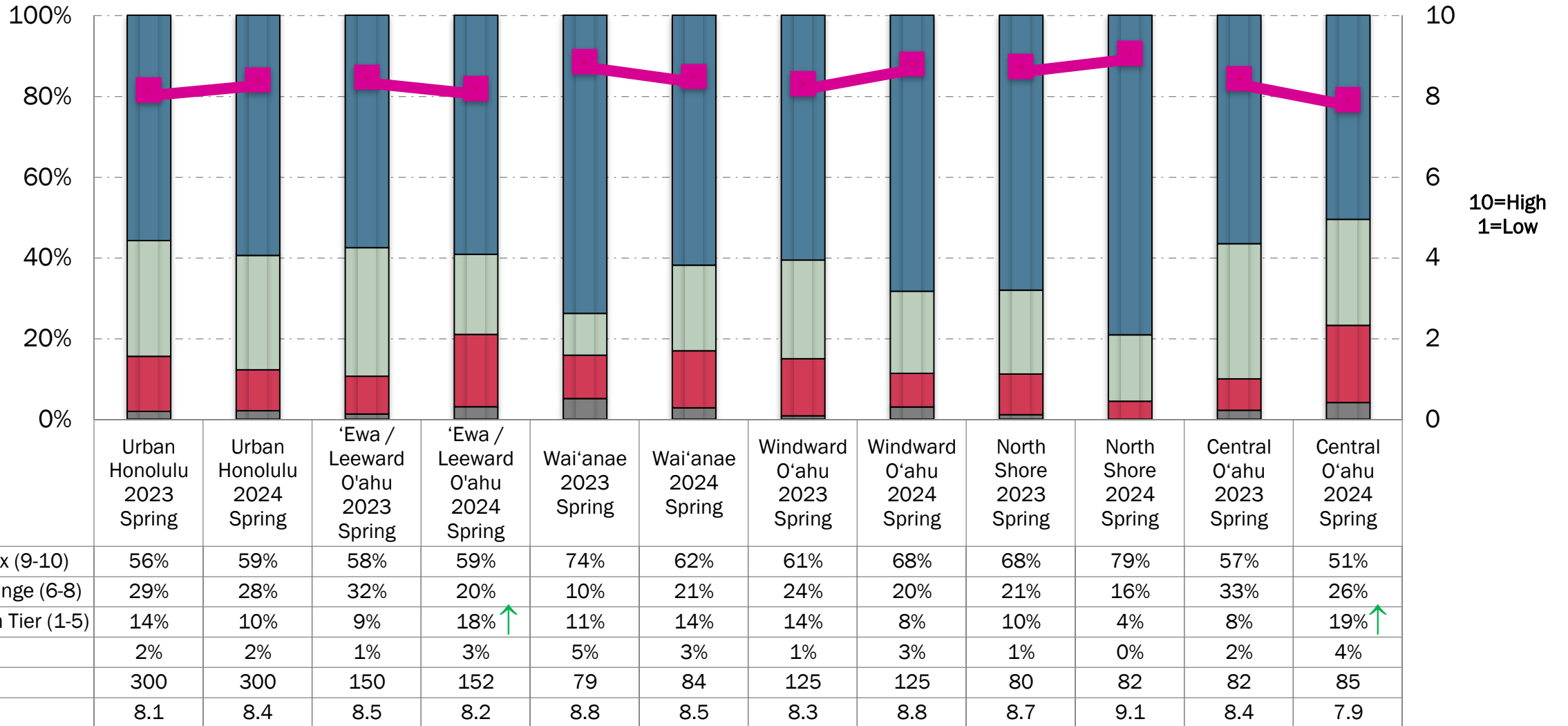
Q3.7. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

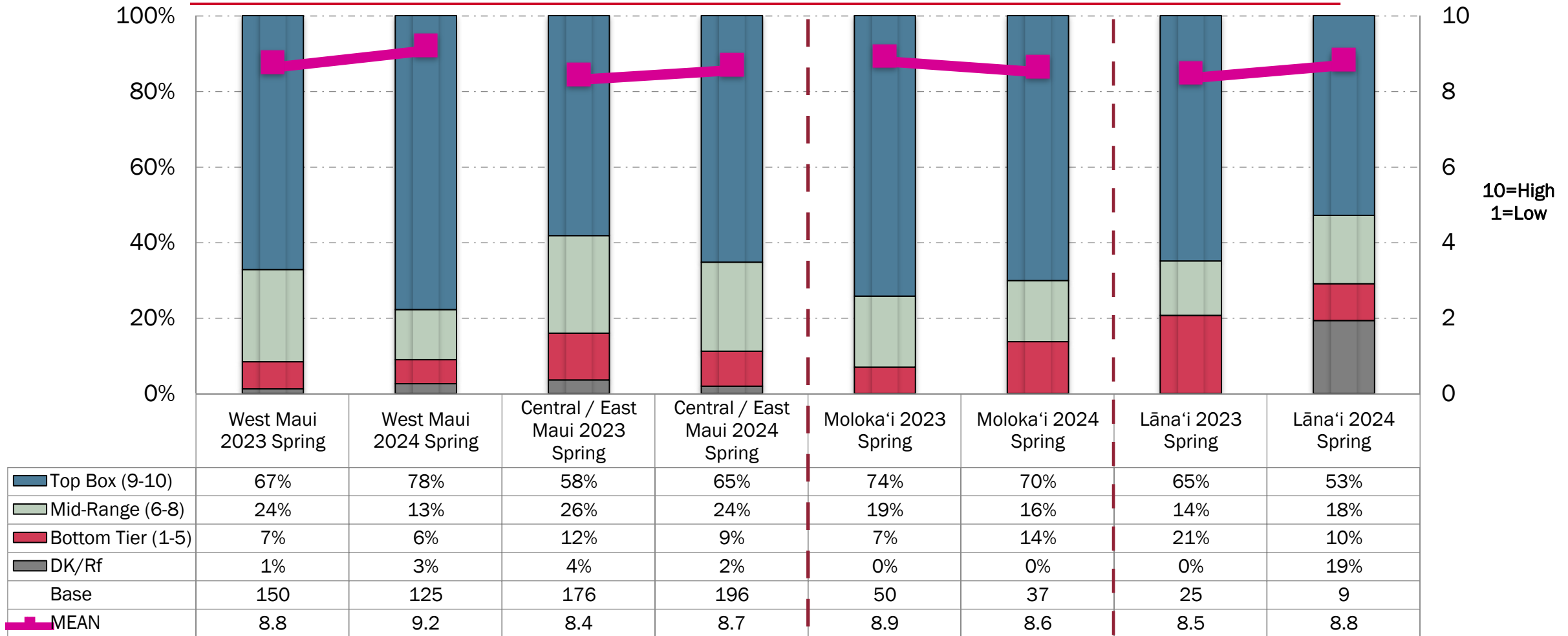


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

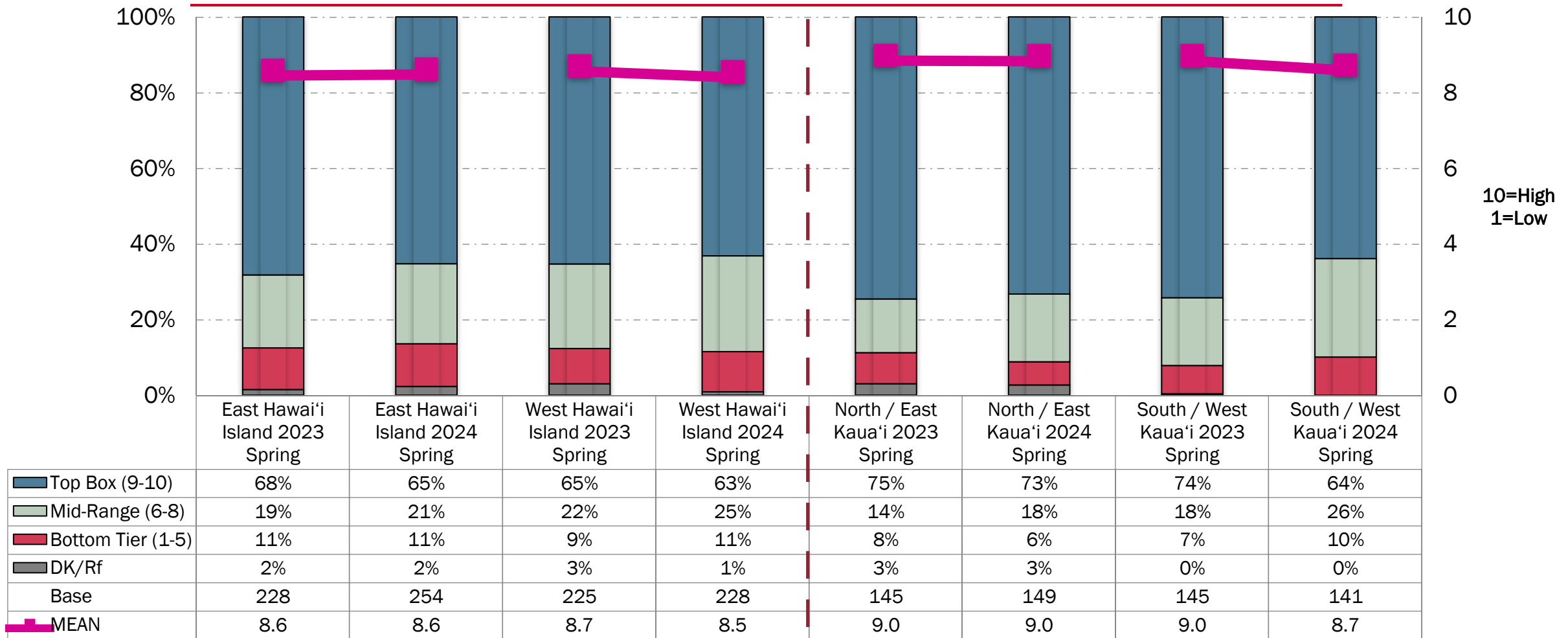
“Authentic presentation of Native Hawaiian language and culture is important” – *By Area (O‘ahu)*



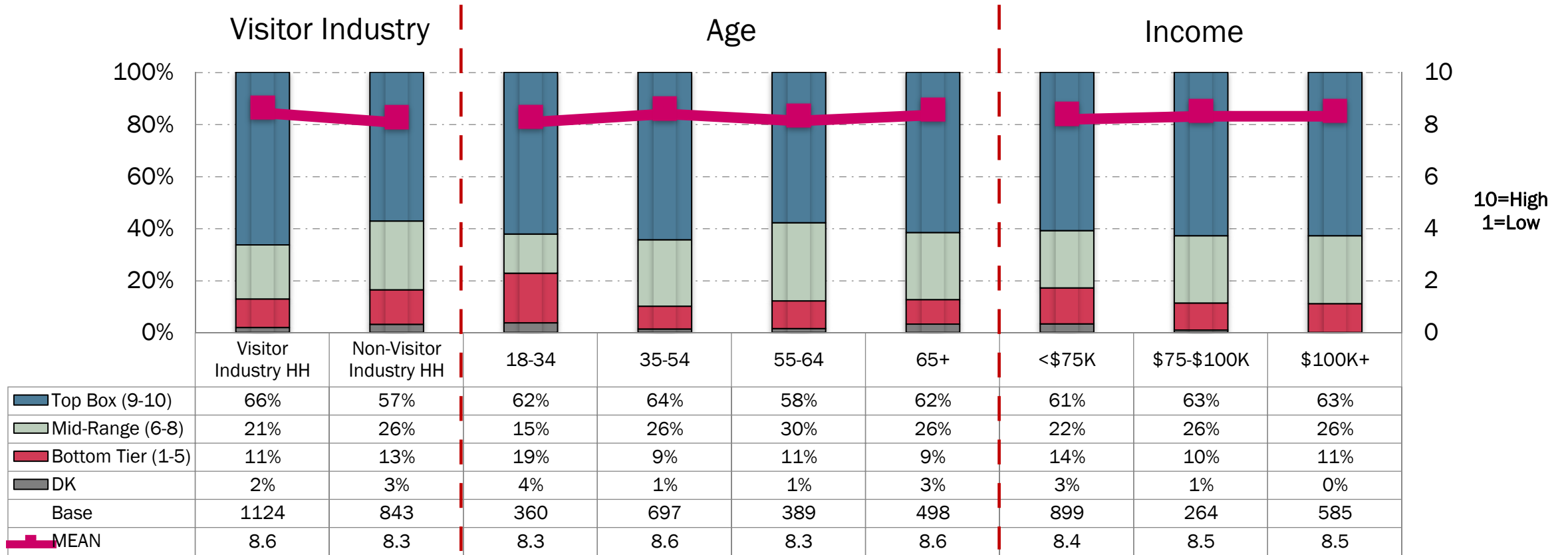
“Authentic presentation of Native Hawaiian language and culture is important” – *By Area (Maui County)*



“Authentic presentation of Native Hawaiian language and culture is important” – *By Area (Hawai‘i Island & Kaua‘i)*

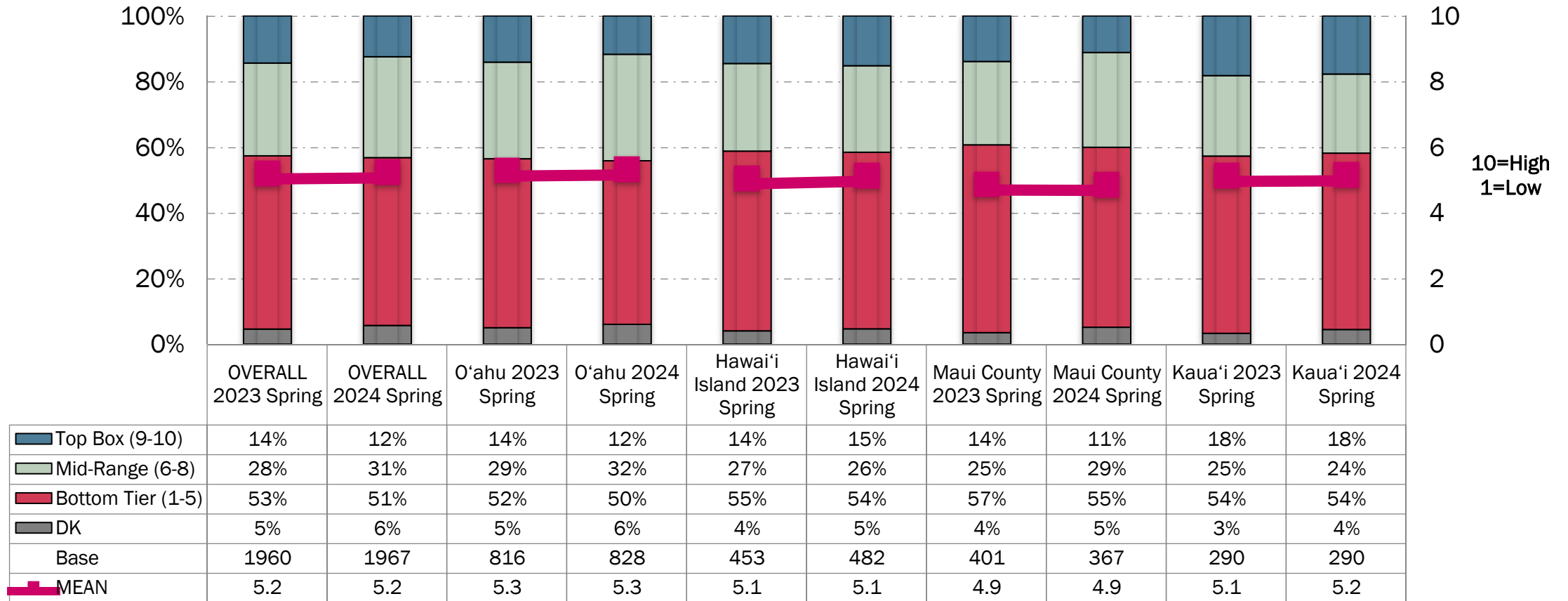


“Authentic presentation of Native Hawaiian language and culture is important” – *By Demographics*



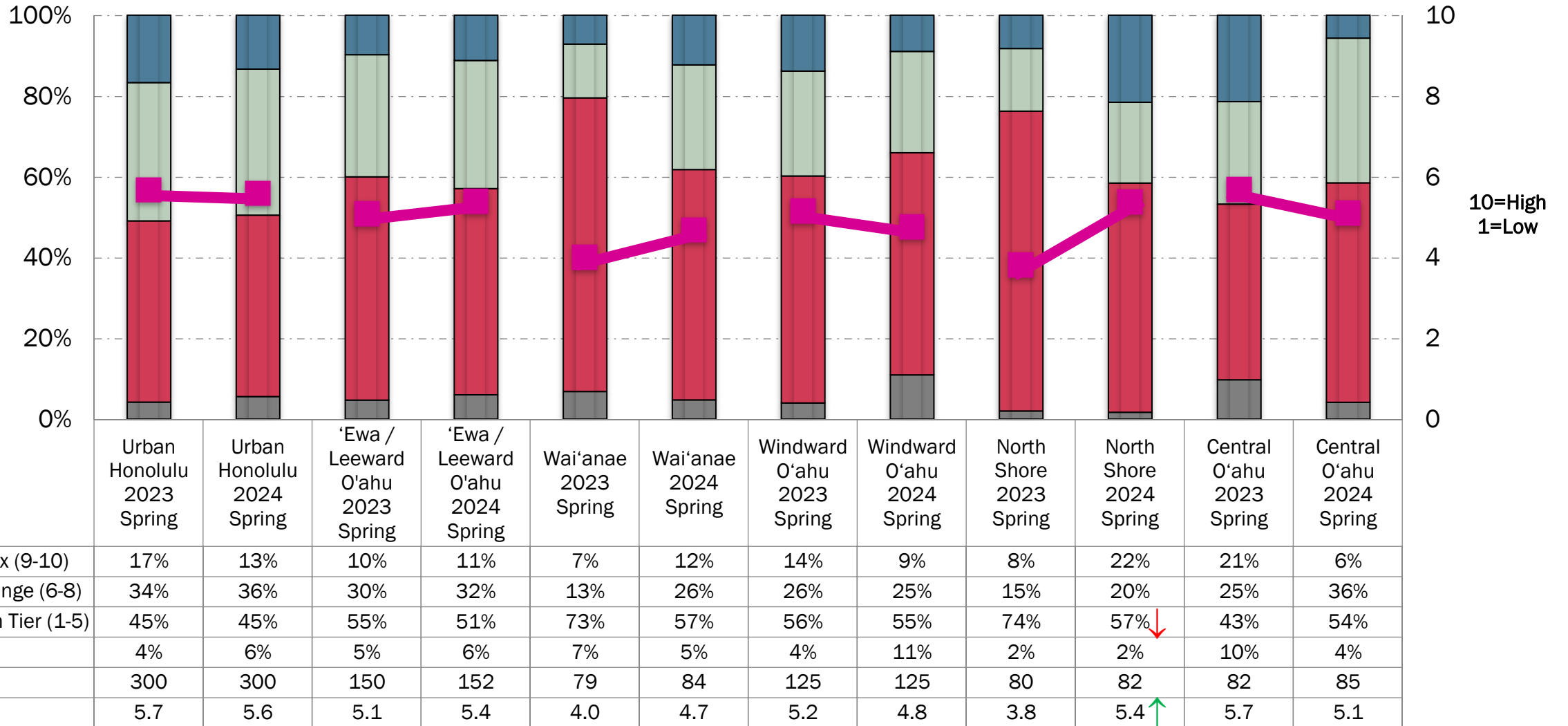
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

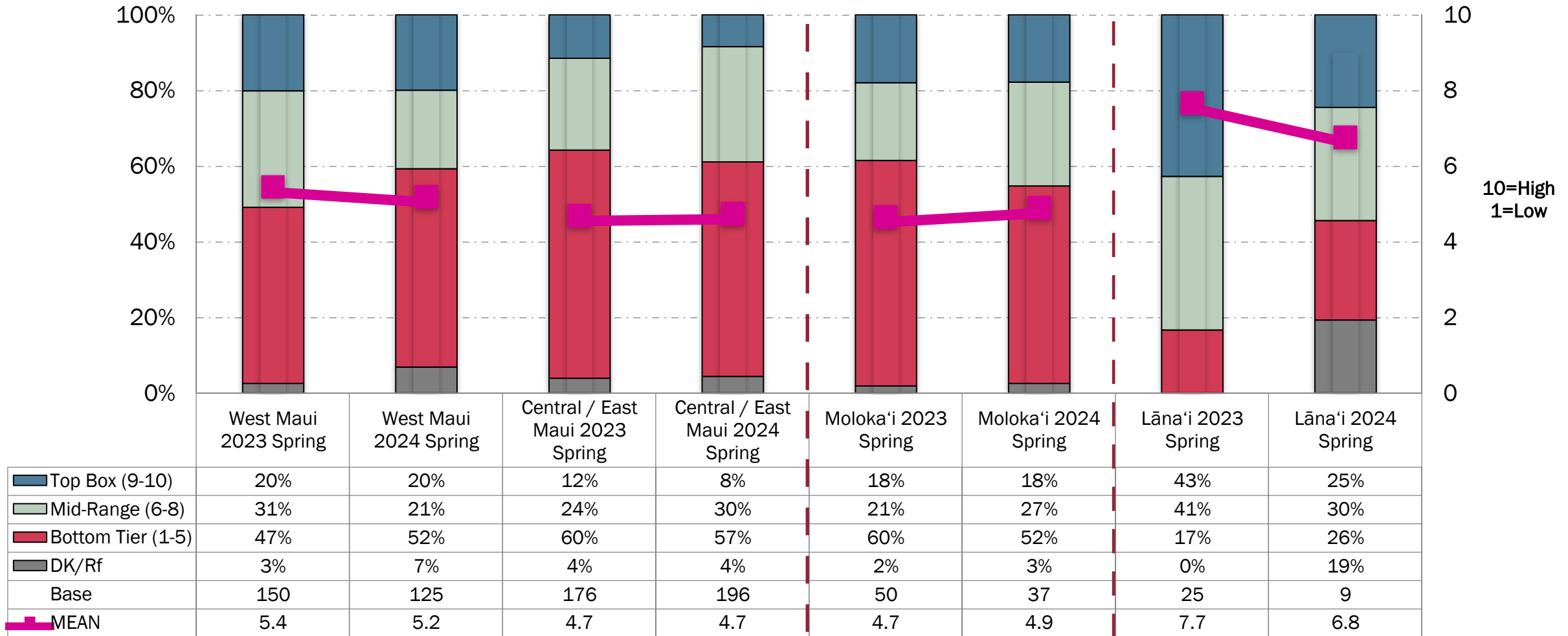


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“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By Area (O’ahu)*



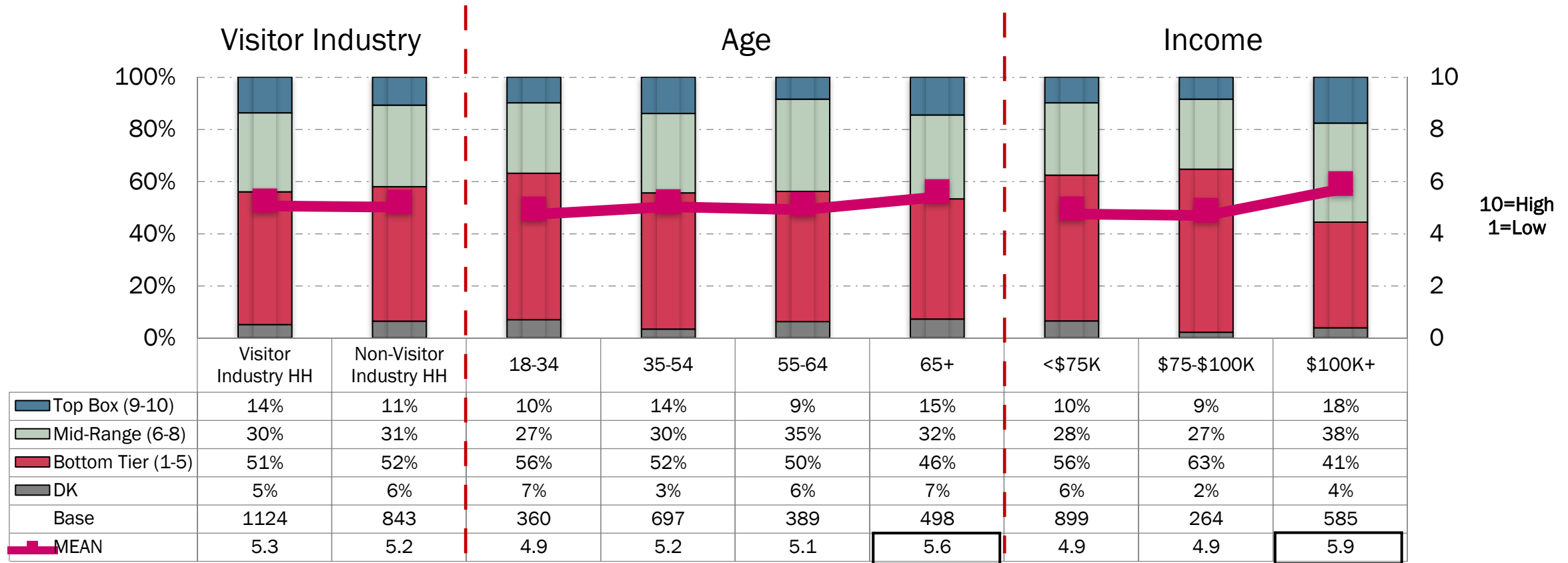
“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By Area (Maui County)*



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

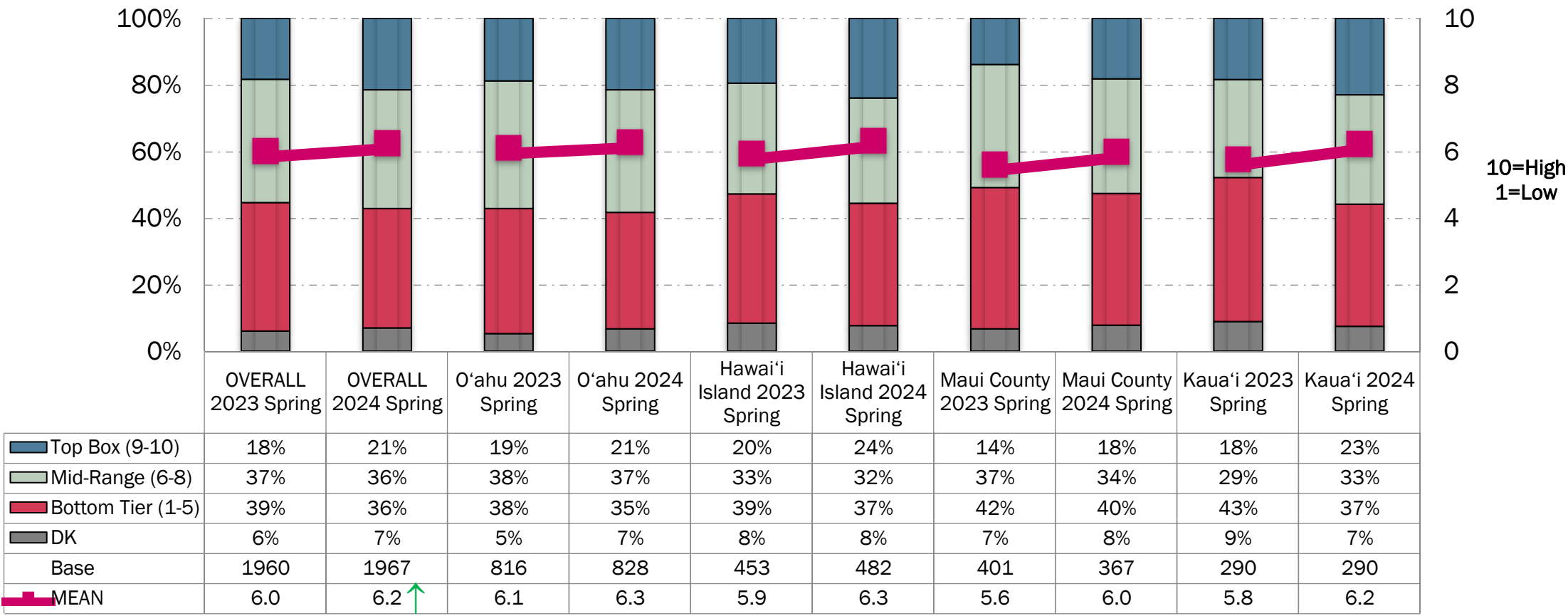


“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By Demographics*



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

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



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

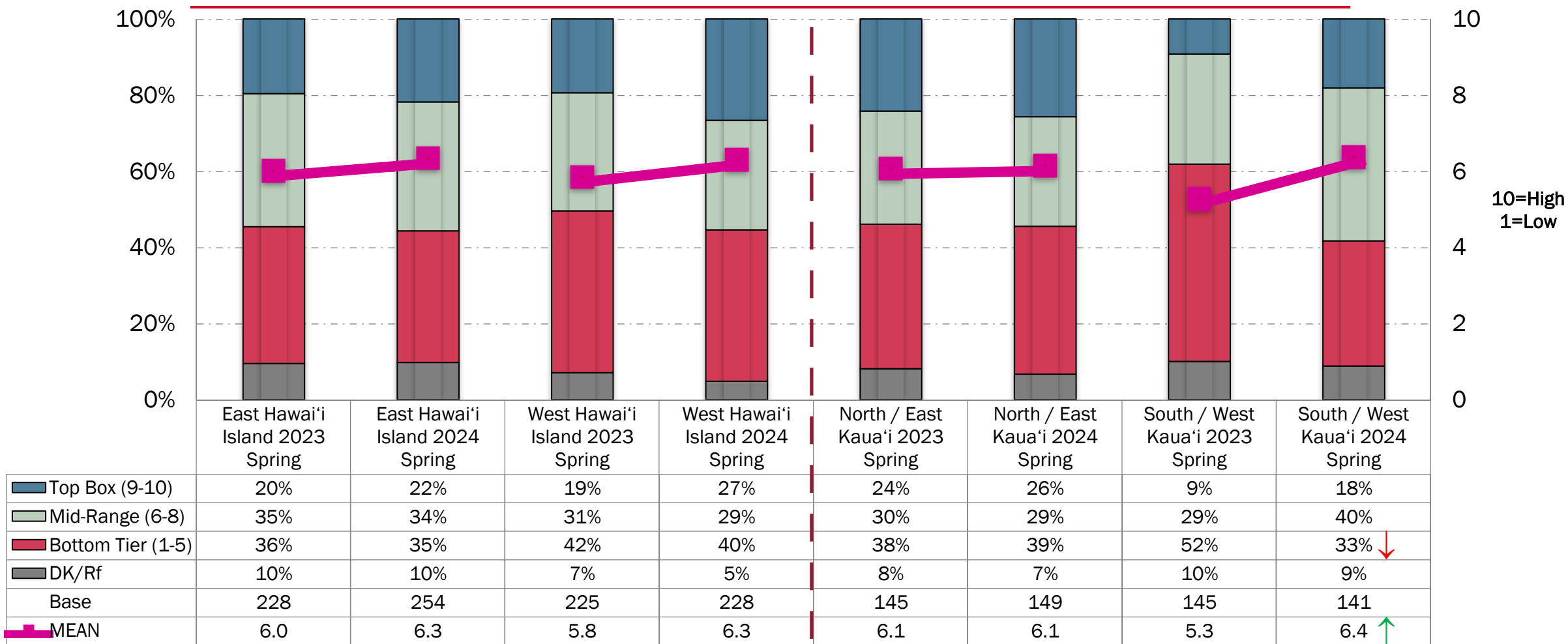
“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Area (O‘ahu)*



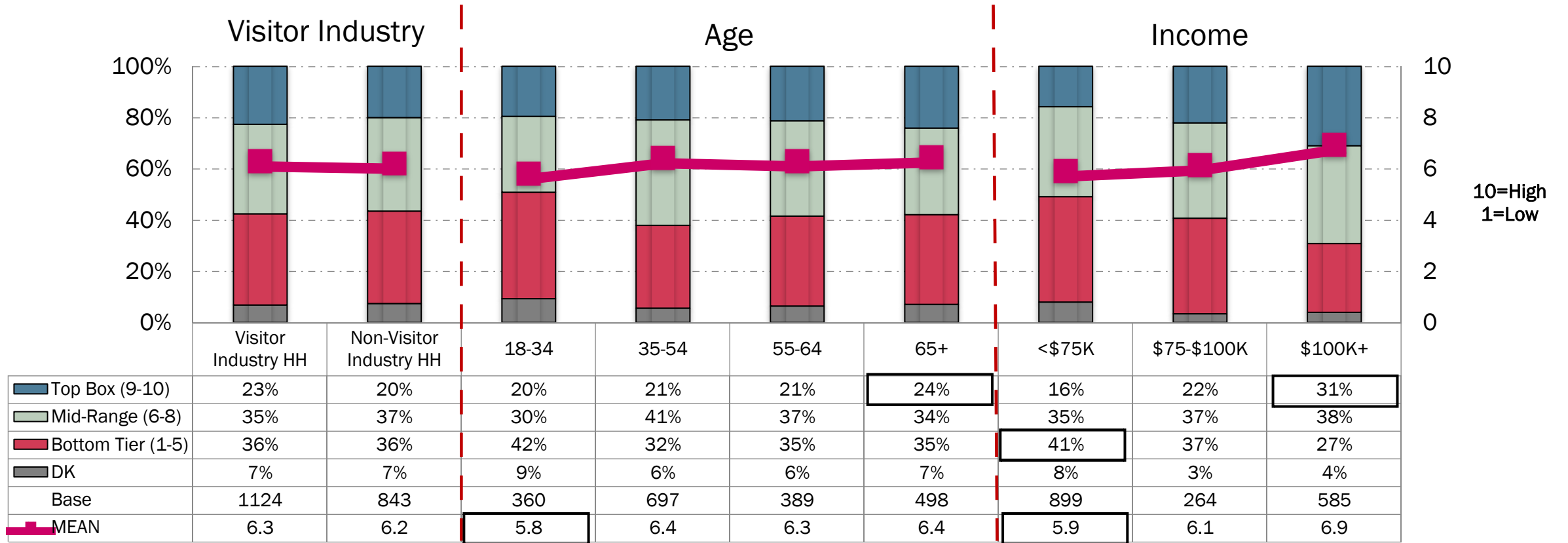
“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Area (Maui County)*



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

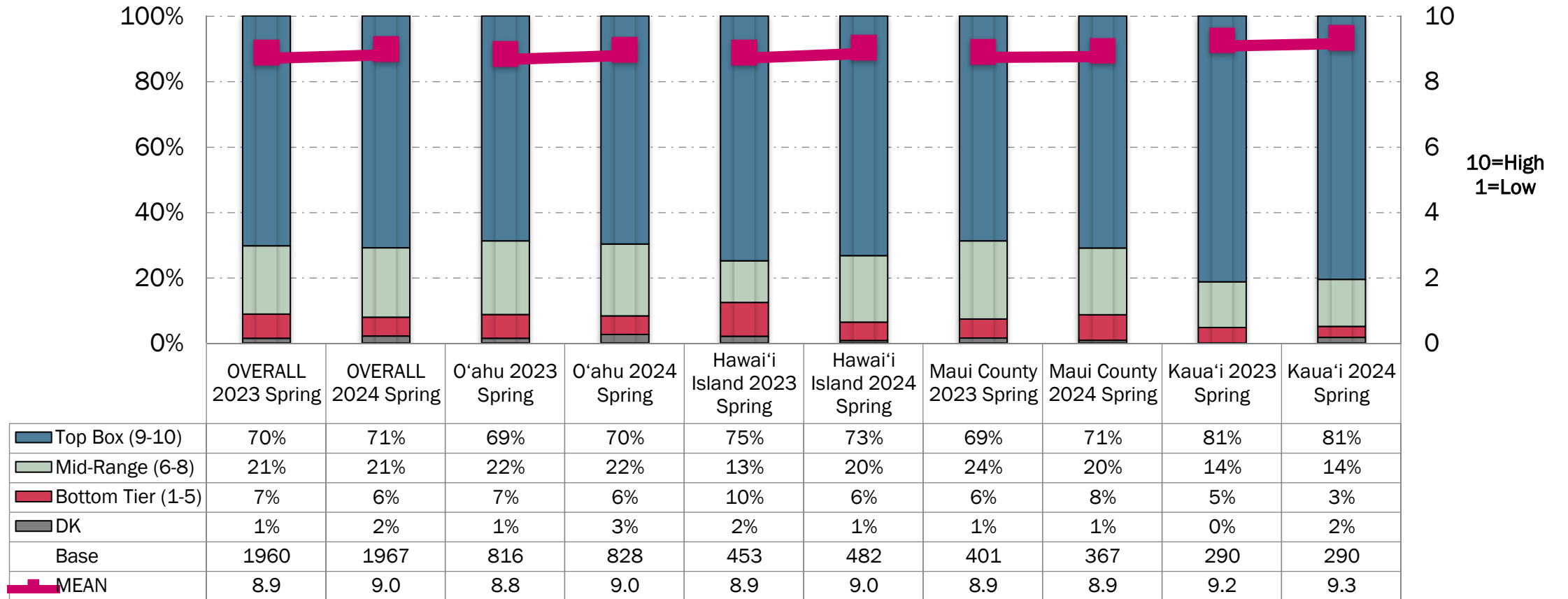


“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Demographics*



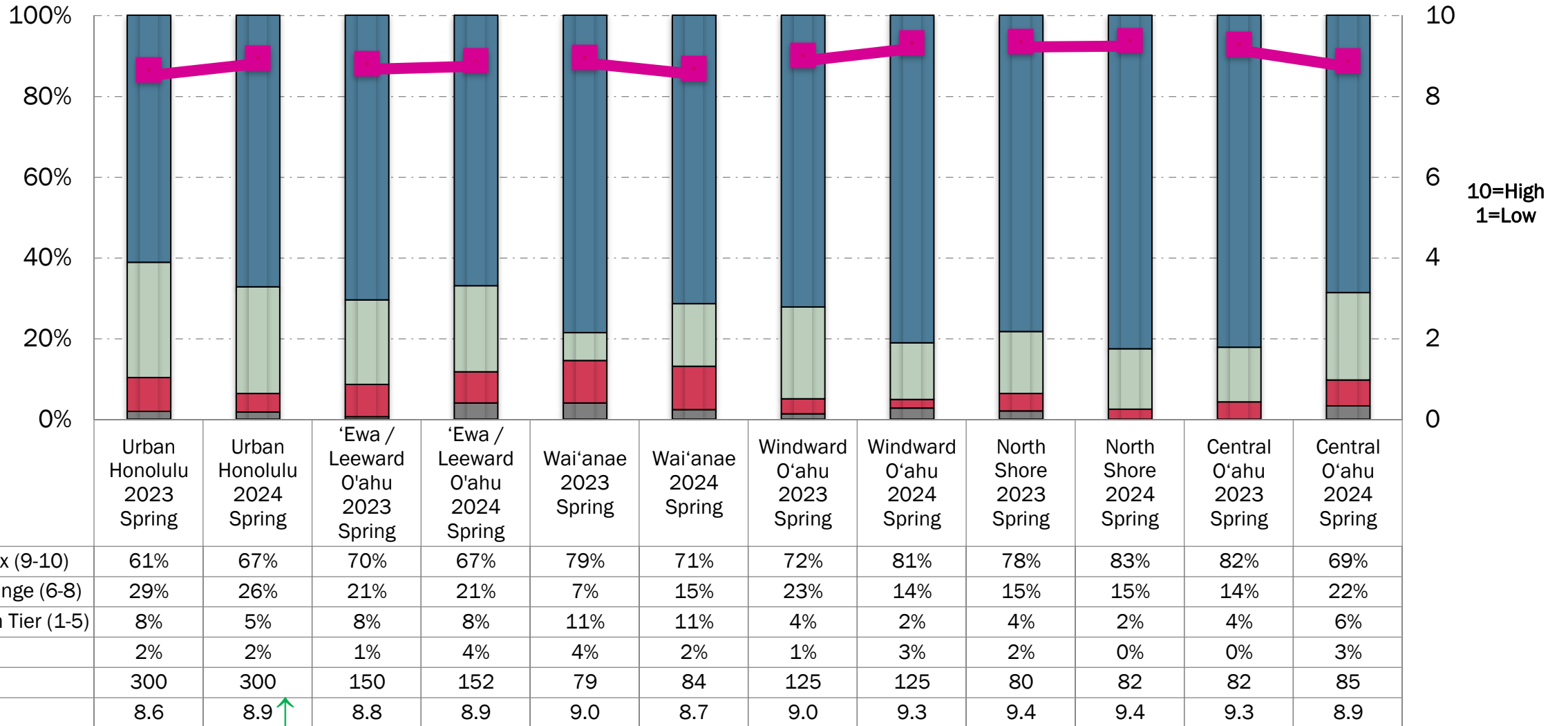
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

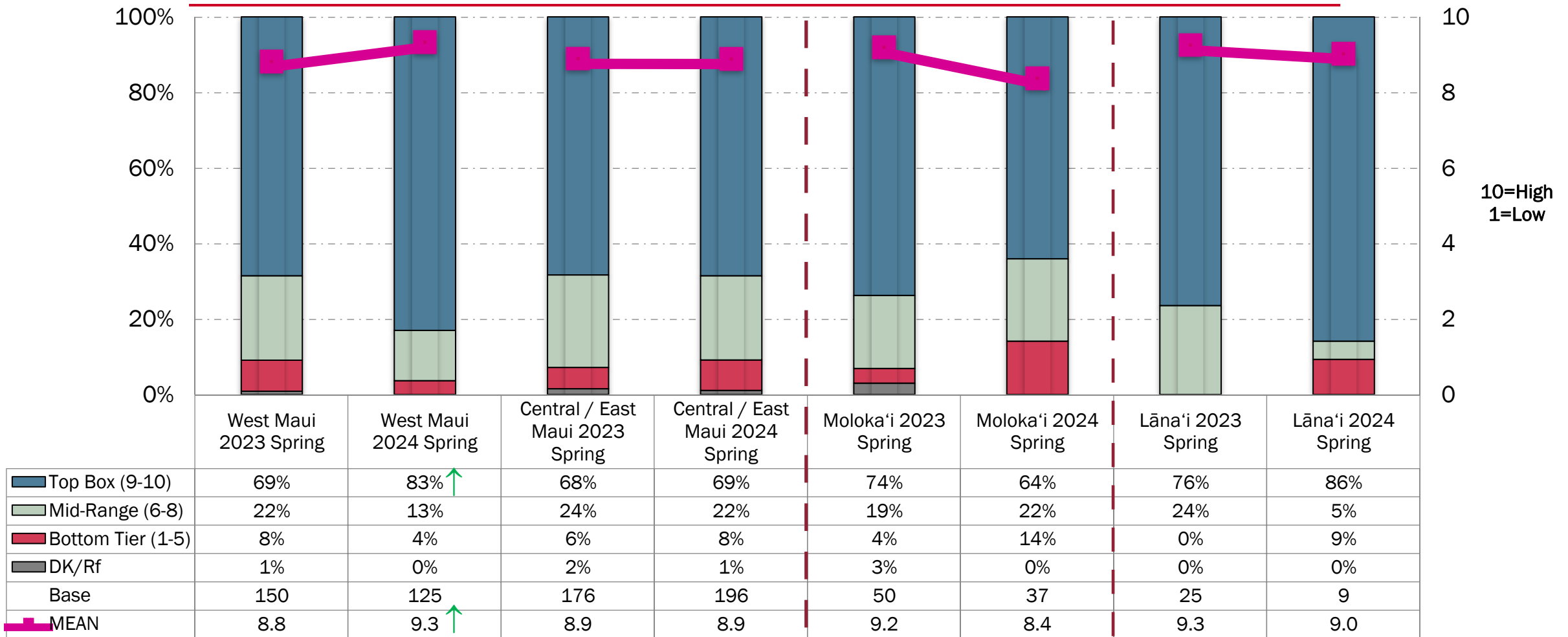


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

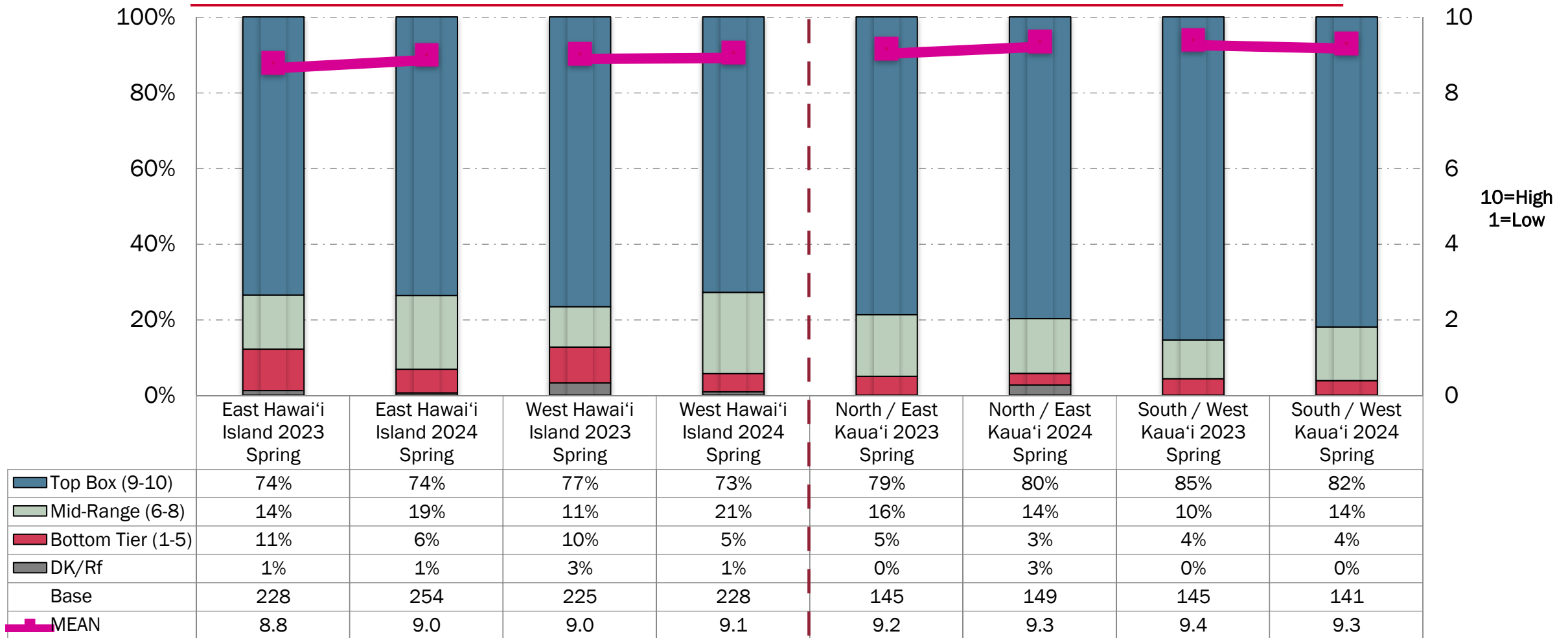
“Visitors need to be educated about protecting Hawai‘i’s natural environment and cultural resources” – *By Area (O‘ahu)*



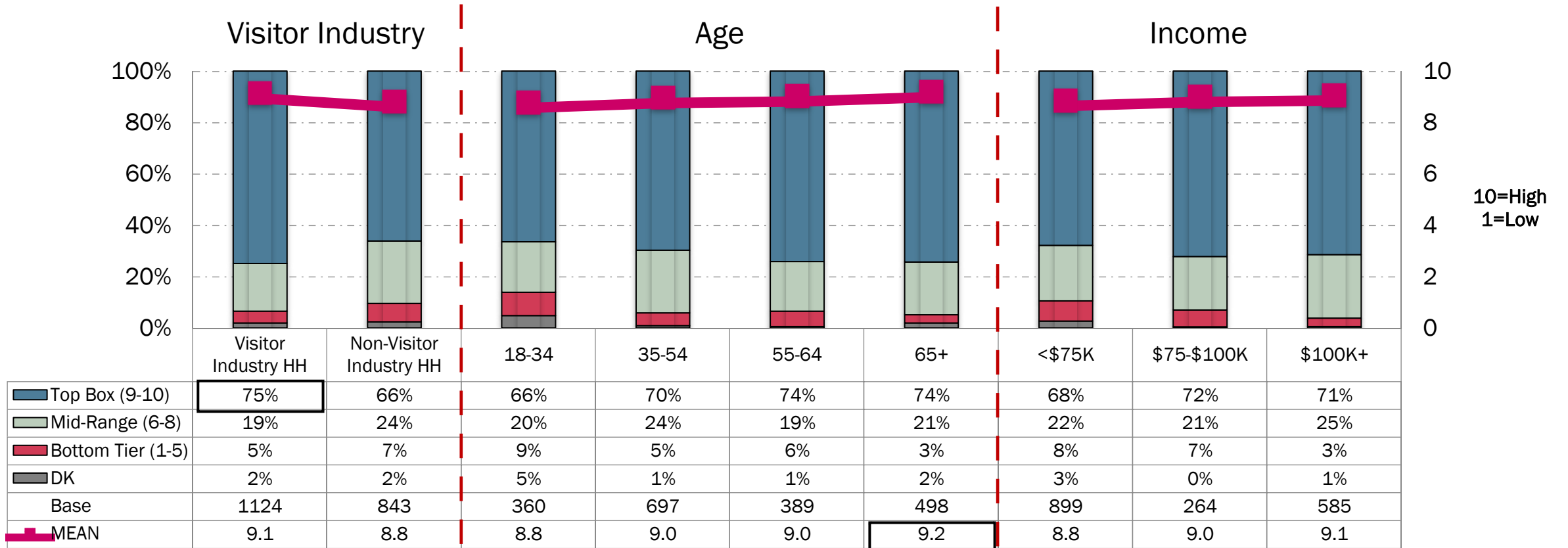
“Visitors need to be educated about protecting Hawai‘i’s natural environment and cultural resources” – *By Area (Maui County)*



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

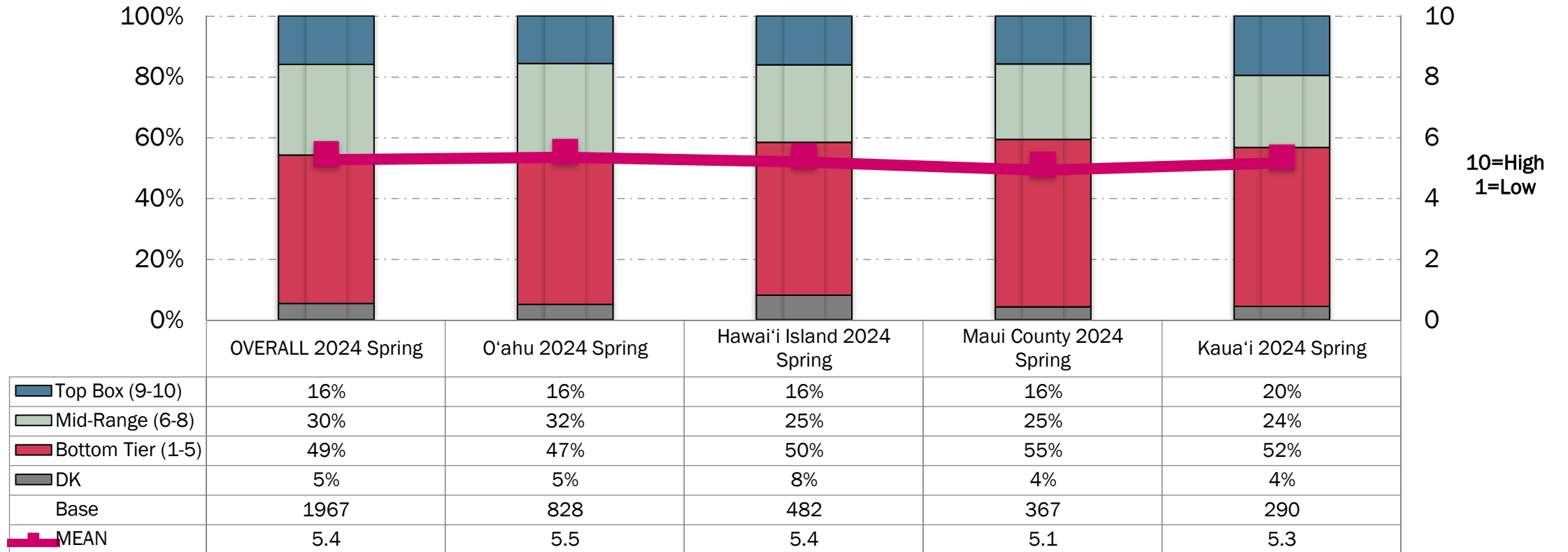


“Visitors need to be educated about protecting Hawai‘i's natural environment and cultural resources” – *By Demographics*



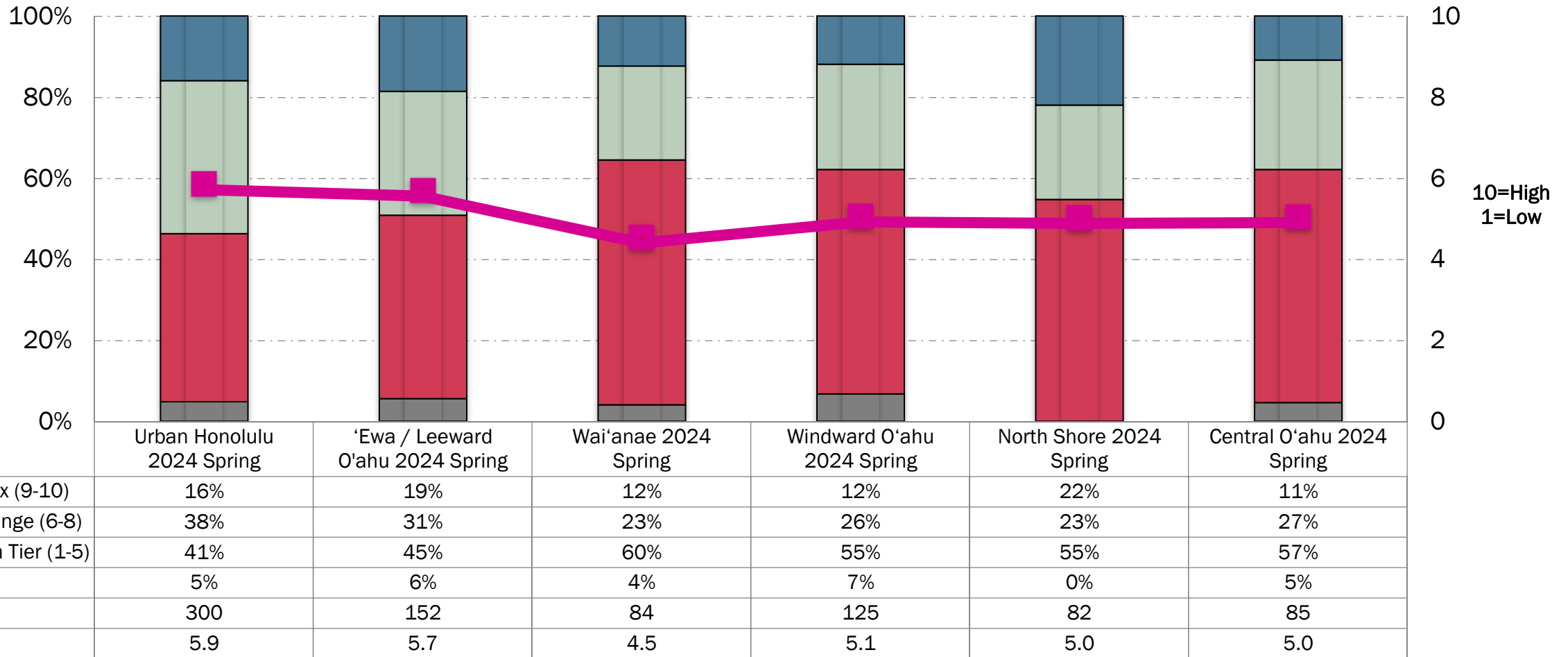
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

NEW “Tourism contributes to the improvement and maintenance of the natural resources in my community” – *By County*



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

NEW “Tourism contributes to the improvement and maintenance of the natural resources in my community” – *By Area (O’ahu)*



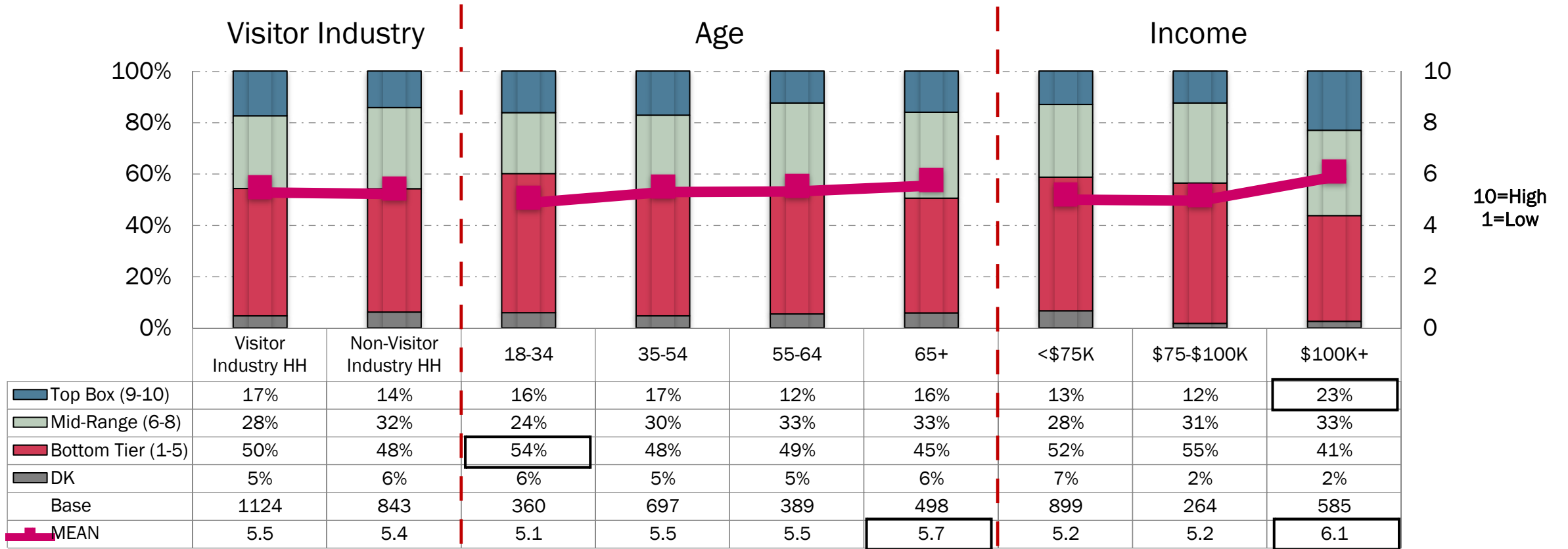
NEW “Tourism contributes to the improvement and maintenance of the natural resources in my community” – *By Area (Maui County)*



NEW “Tourism contributes to the improvement and maintenance of the natural resources in my community” – *By Area (Hawai‘i Island & Kaua‘i)*

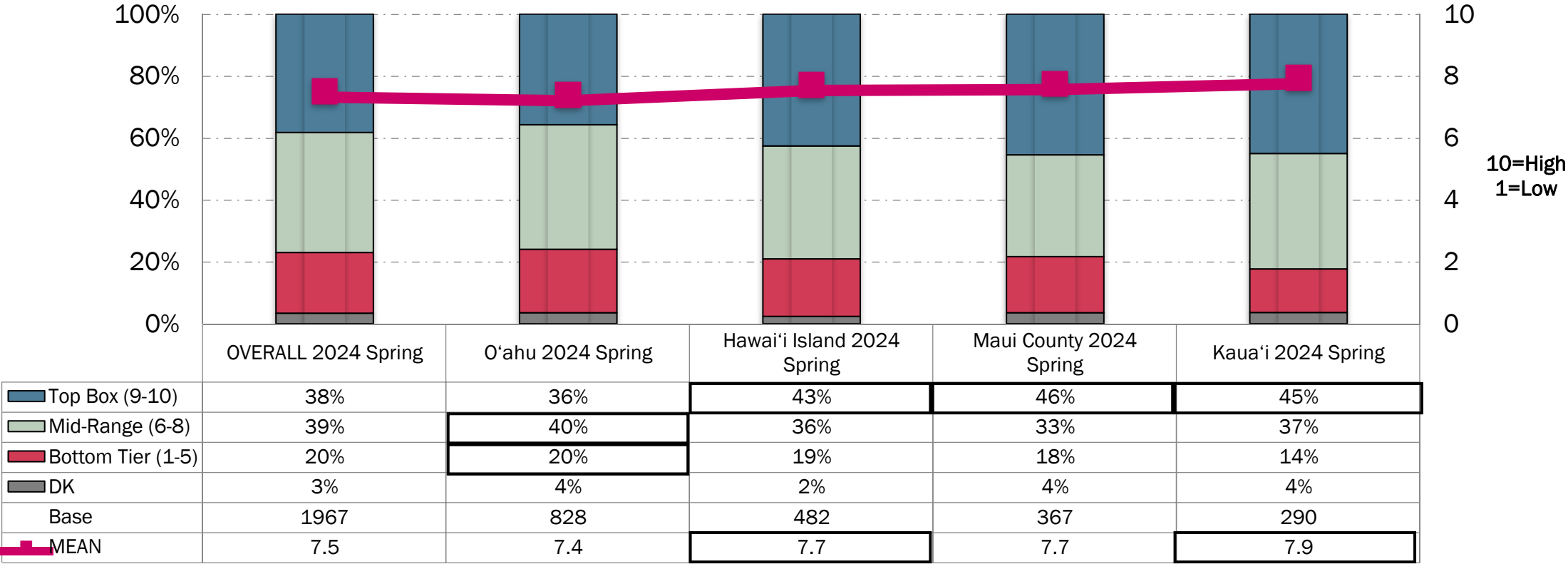


NEW “Tourism contributes to the improvement and maintenance of the natural resources in my community” – *By Demographics*



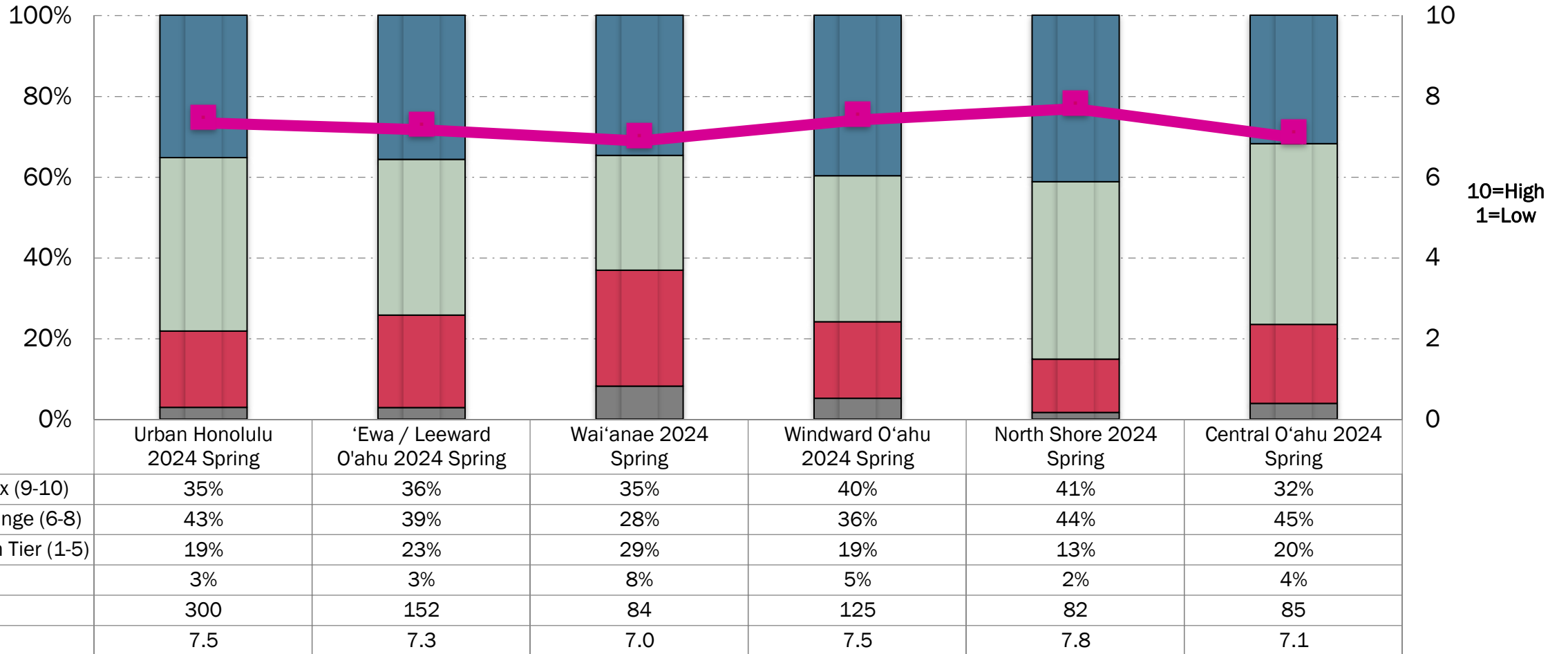
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – *By County*



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

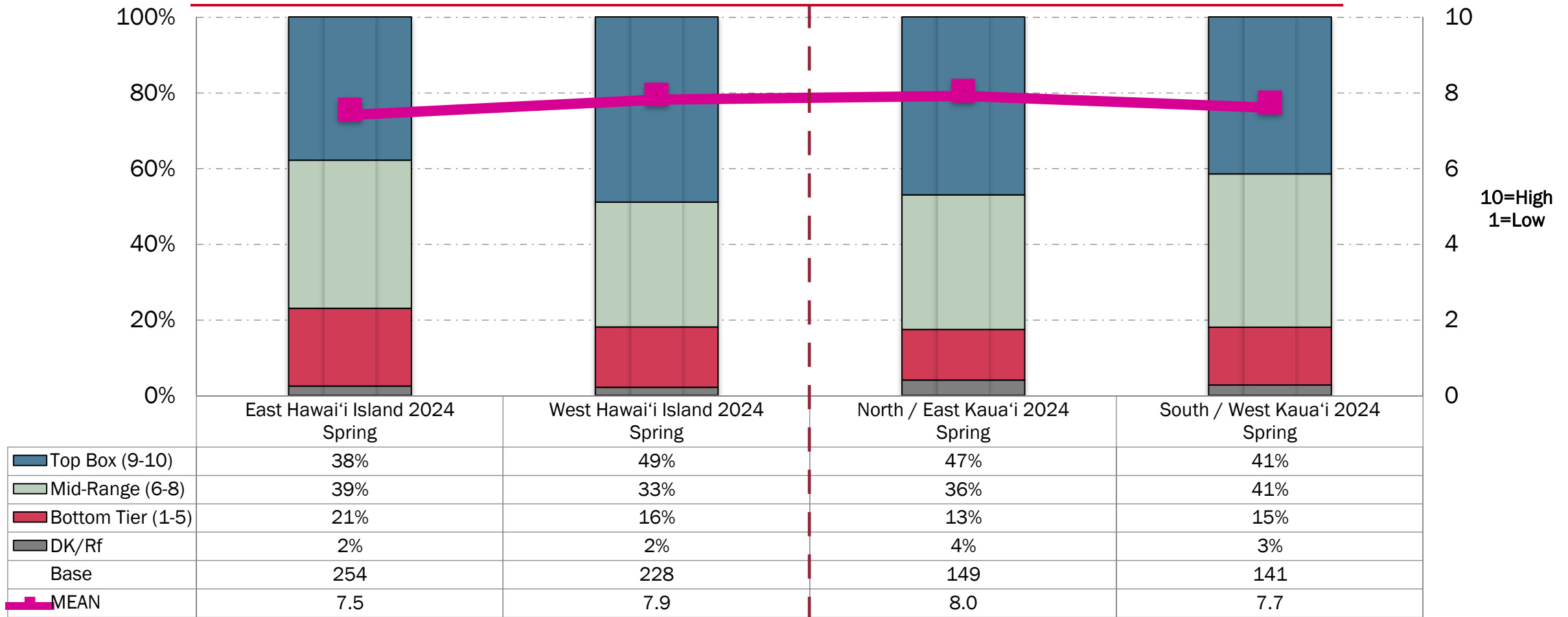
NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – By Area (O‘ahu)



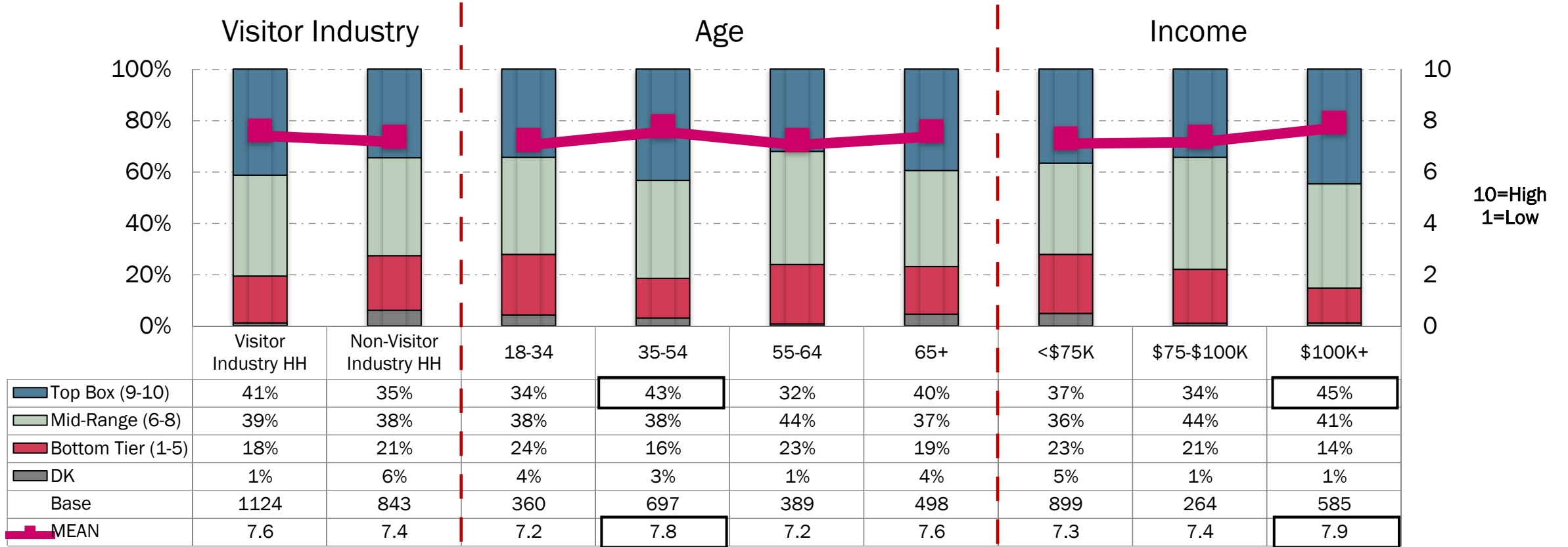
NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – By Area (Maui County)



NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – By Area (Hawai‘i Island & Kaua‘i)



NEW “I feel safe when I travel to visitor destinations in Hawai‘i” – By Demographics

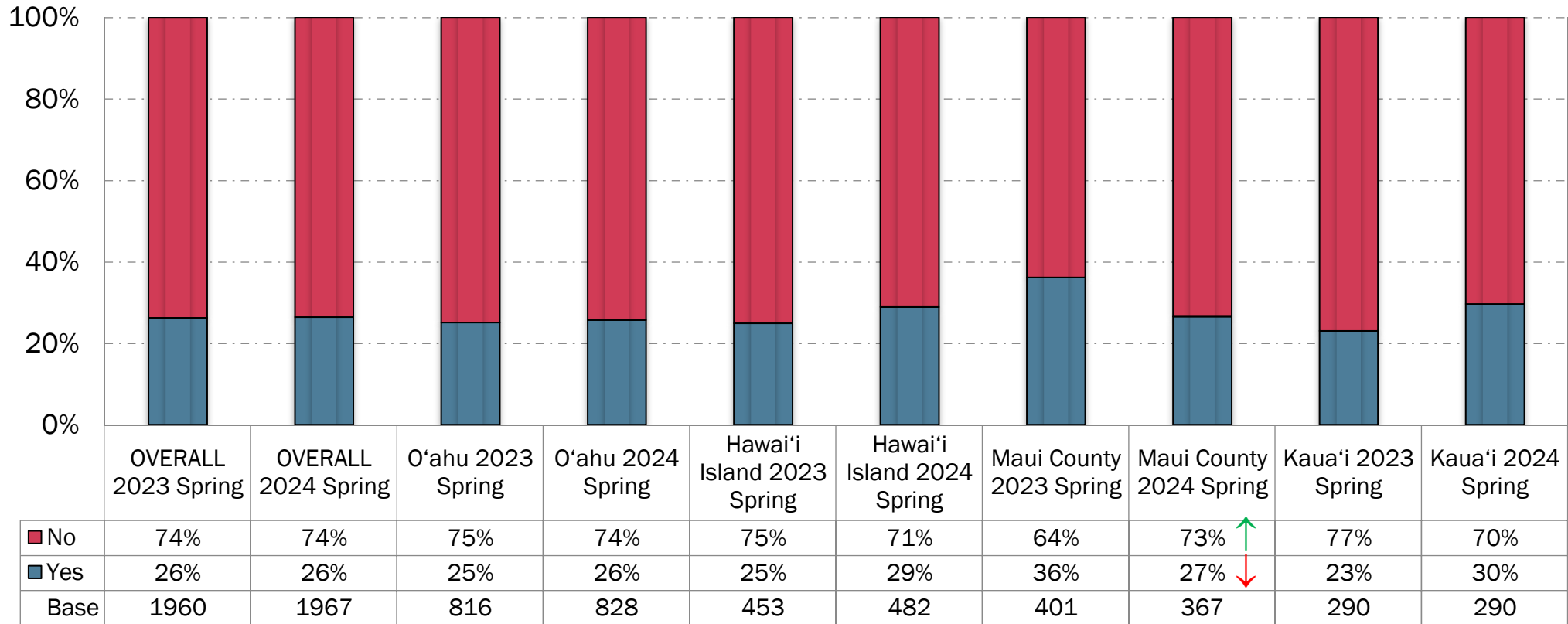


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



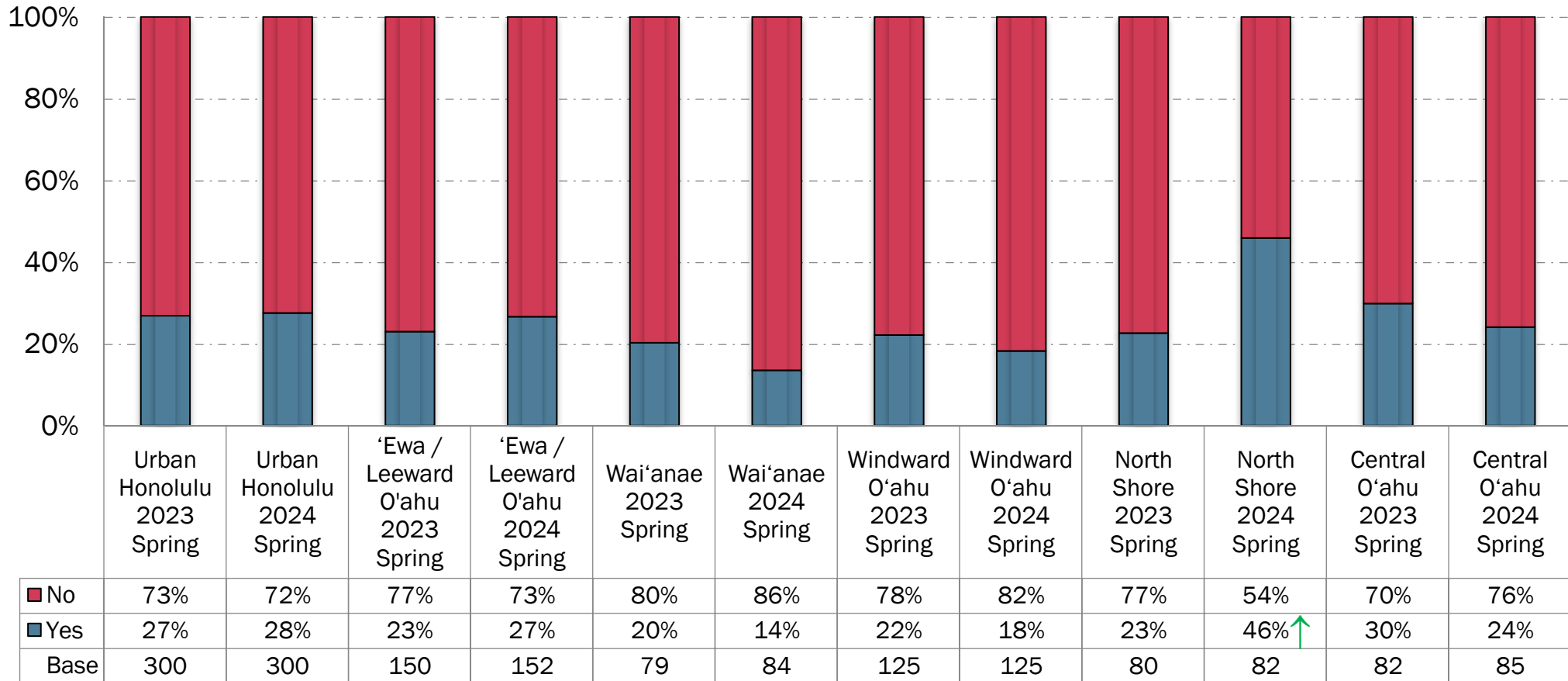
Destination Management Action Plans (Spring 2023 - 2024)

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



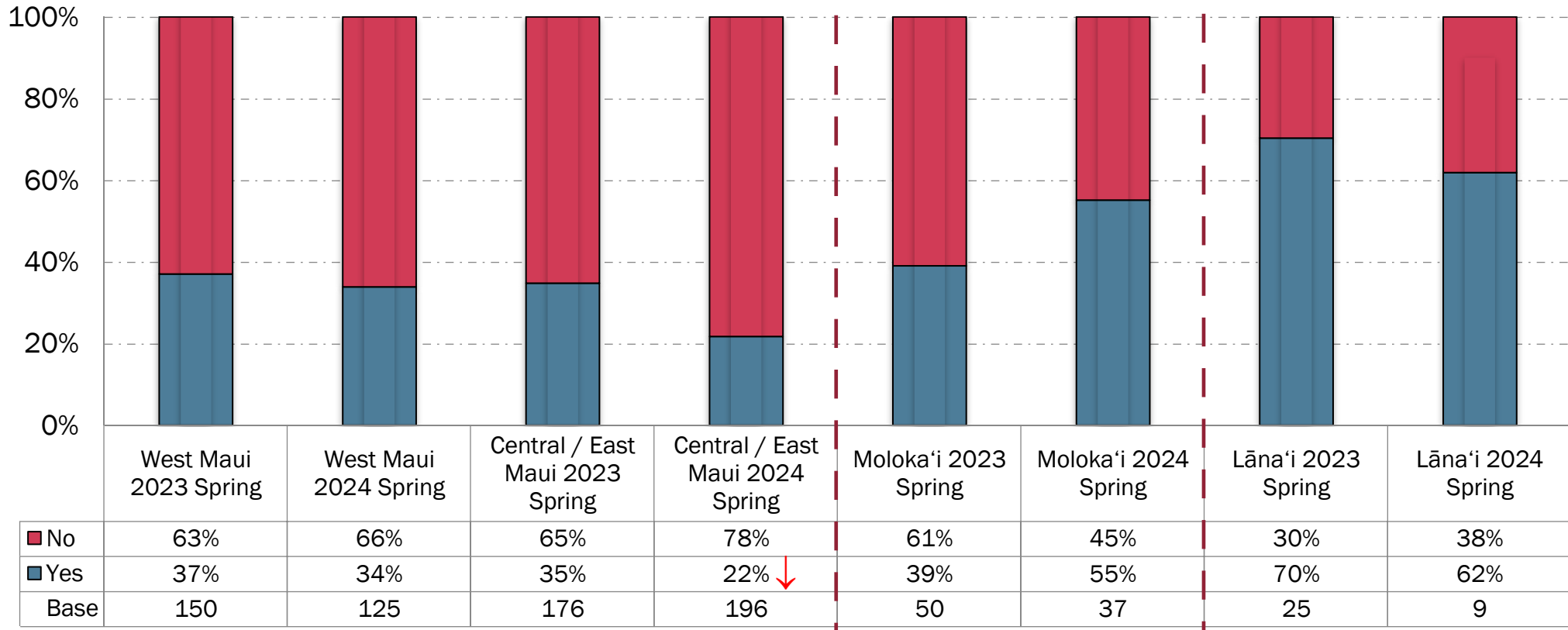
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s ‘Destination Management Action Plans (DMAP)’” – By Area (O‘ahu)



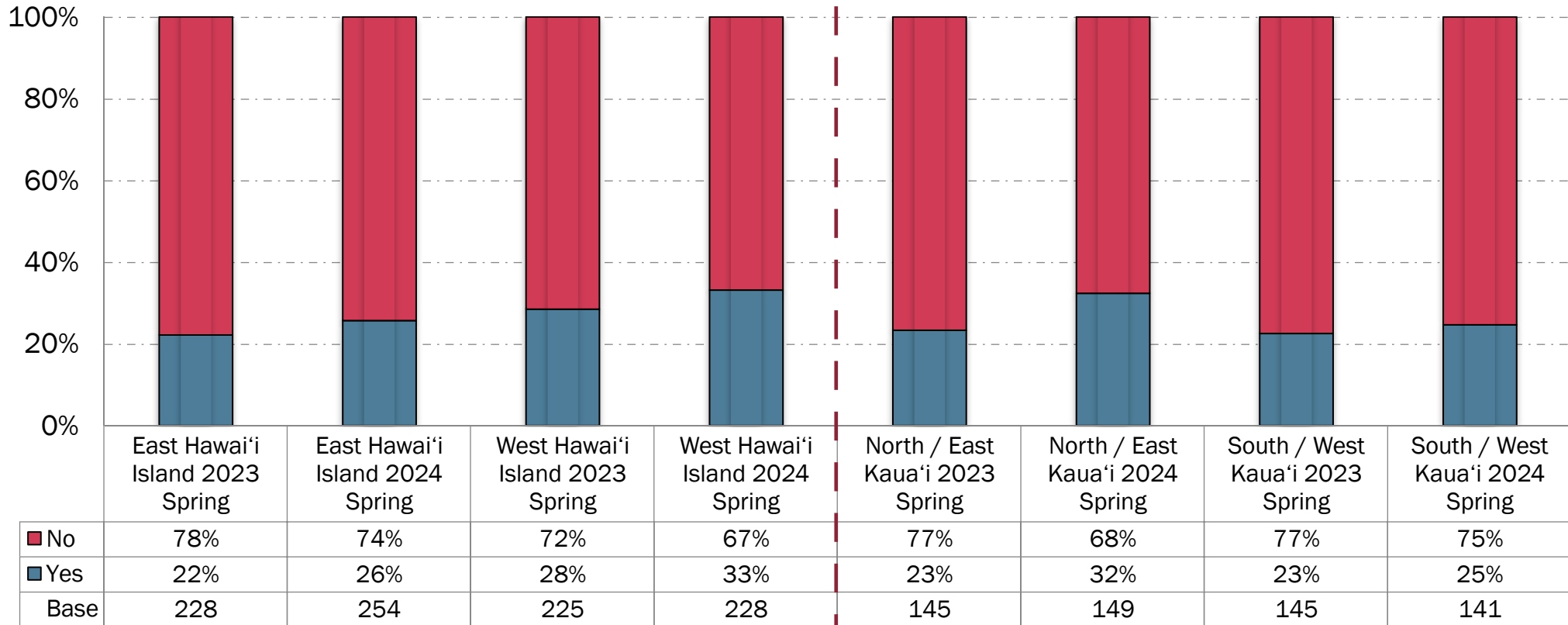
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s ‘Destination Management Action Plans (DMAP)’” – By Area (Maui County)



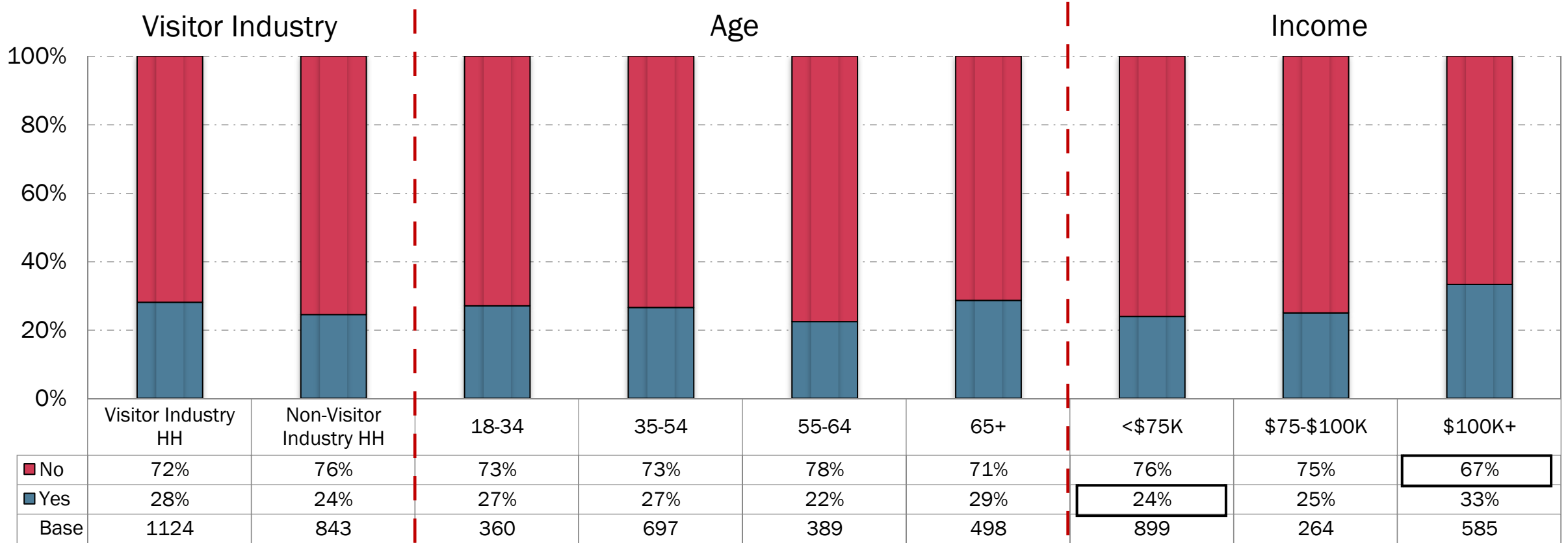
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

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



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

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



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



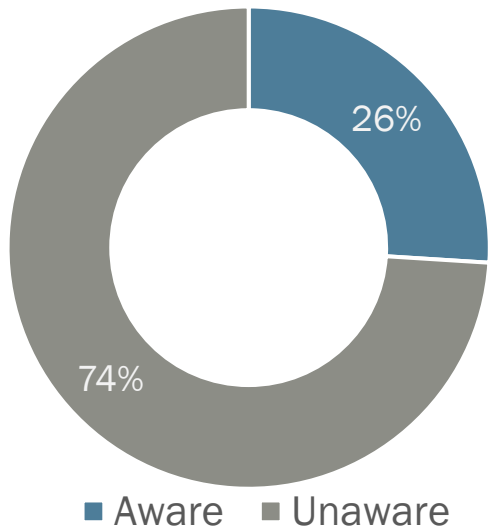
Hawai‘i Tourism Authority’s Destination Management Action Plan: O‘ahu (Spring 2023 - 2024)

Destination Management Action Plans Awareness: O‘ahu

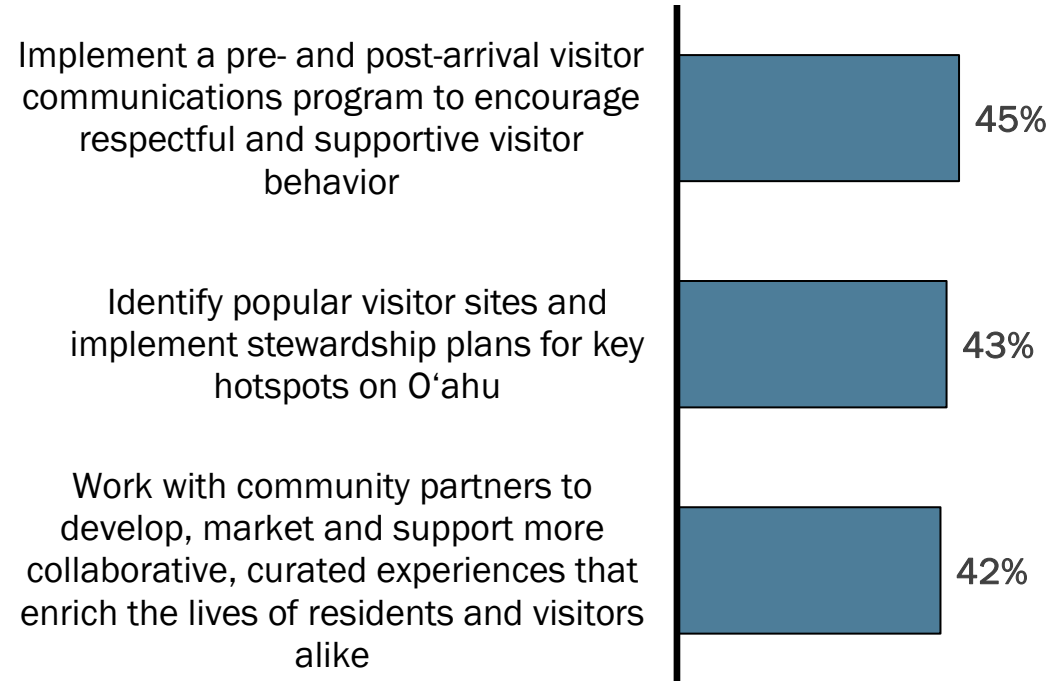
In Spring 2024, awareness of HTA’s Destination Management Action Plans rose to 26 percent, a 1-point improvement from the previous period. Recognition of individual plan initiatives such as pre-/post-arrival communications, identifying sites for stewardship, and collaborating with community partners garnered higher recognition with 59 percent aware of at least one Destination Stewardship Initiative.

% Aware of HTA Destination Management Action Plans

▲ 1-point improvement from Spring 2023



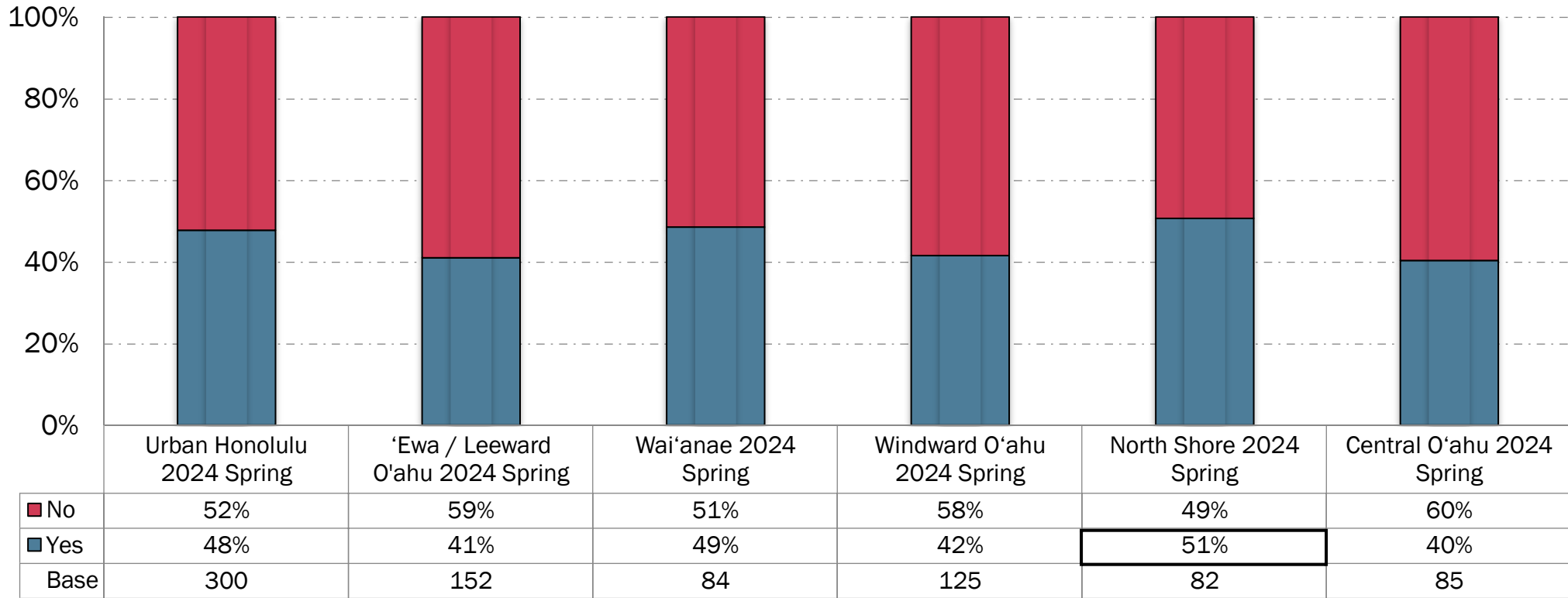
ALL O‘ahu residents: 59% are aware of at least one initiative



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: 828)

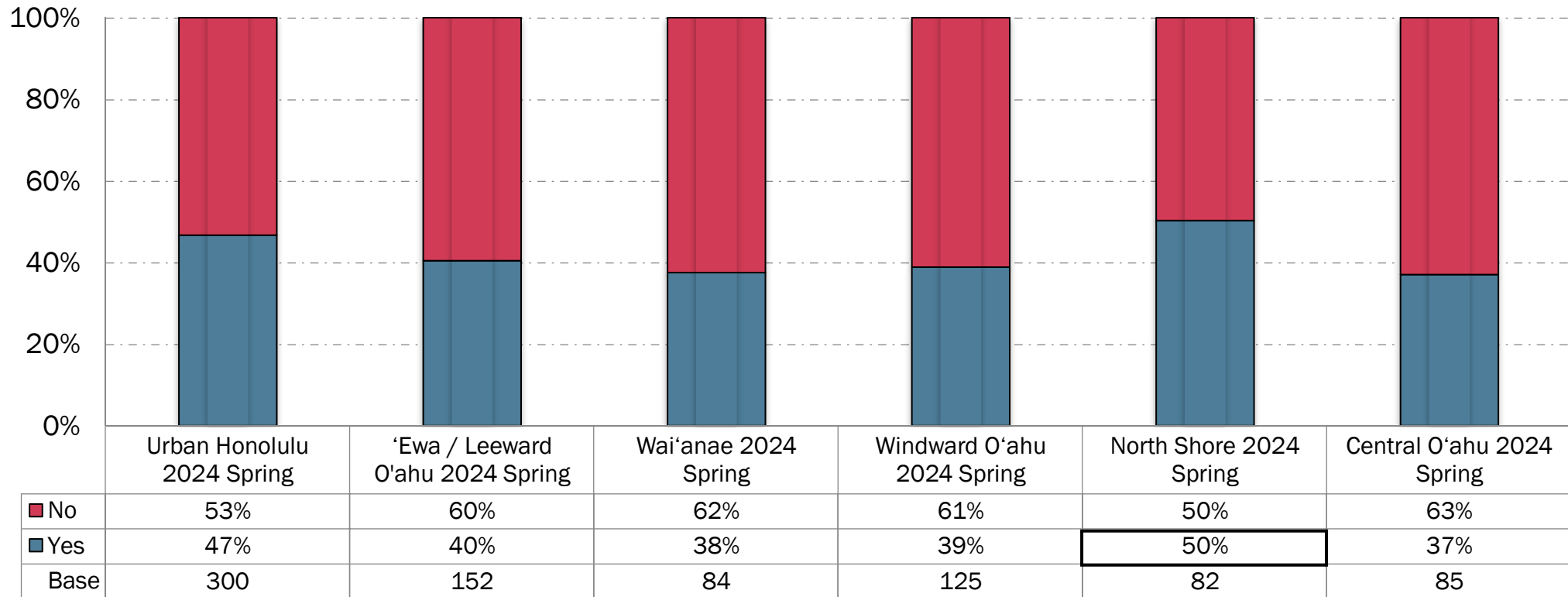
Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 828)

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



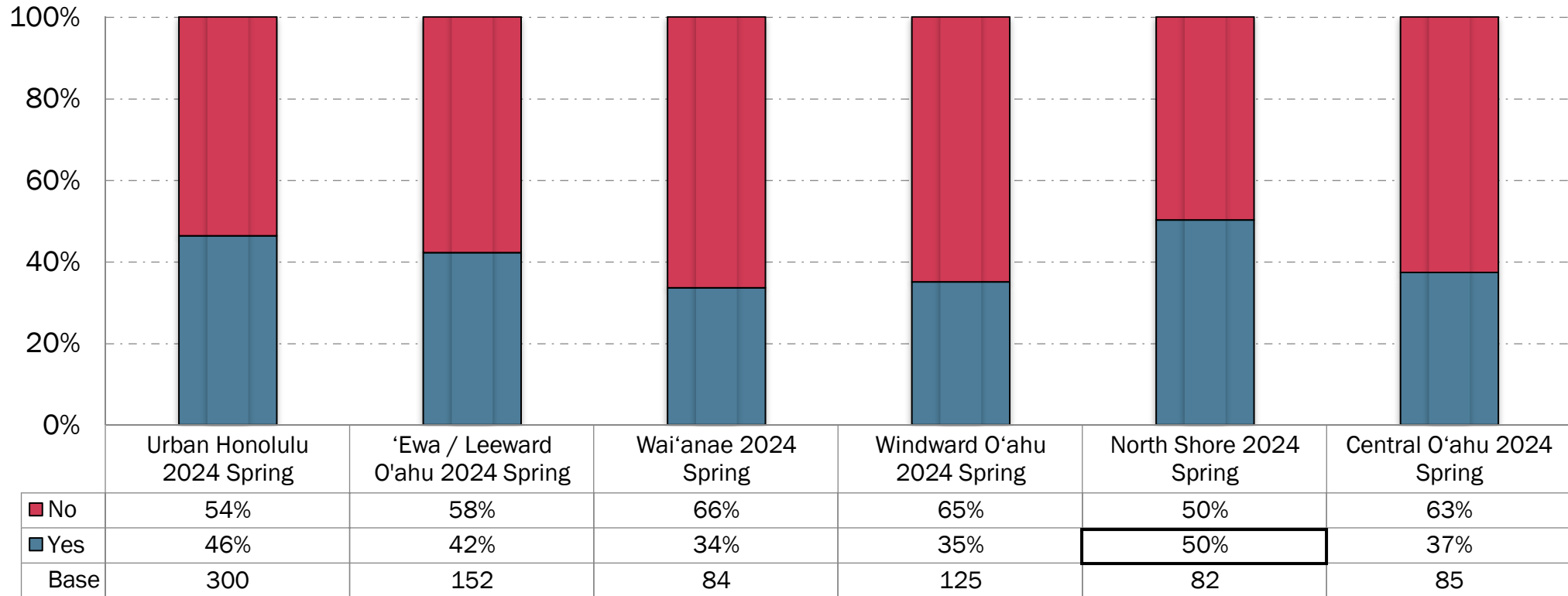
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



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

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



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



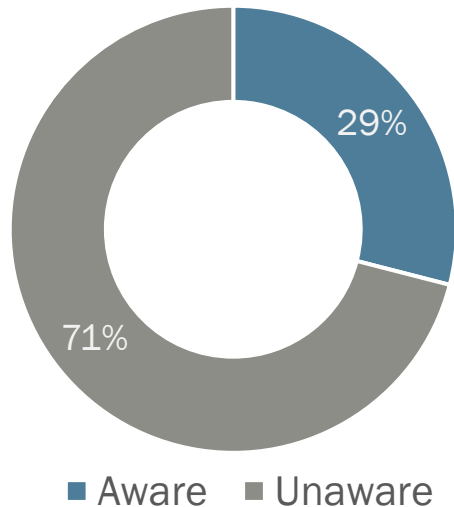
Hawai‘i Tourism Authority’s Destination Management Action Plan: Hawai‘i Island (Spring 2023 - 2024)

Destination Management Action Plans Awareness: Hawai'i Island

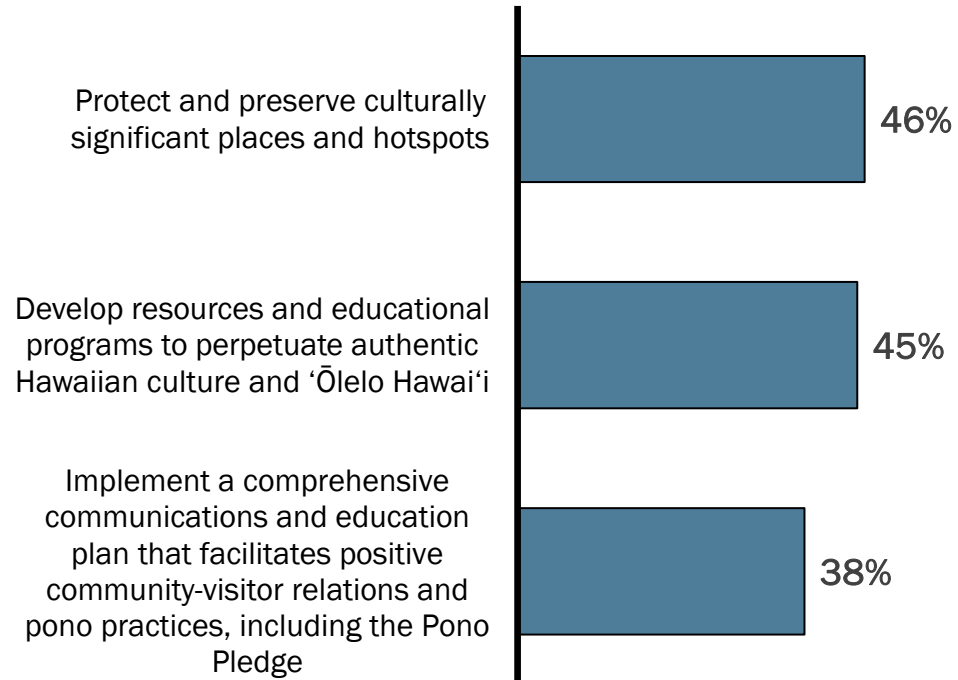
Among Hawai'i Island residents, awareness of HTA's Destination Management Action Plans rose to 29 percent, a 4-point improvement from the previous period. More than half (57%) were aware of at least one Destination Stewardship initiative, such as protecting culturally significant places, perpetuating authentic Hawaiian culture, or implementing communications that facilitate positive community-visitor relations.

% Aware of HTA Destination Management Action Plans

▲ 4-point improvement from Spring 2023



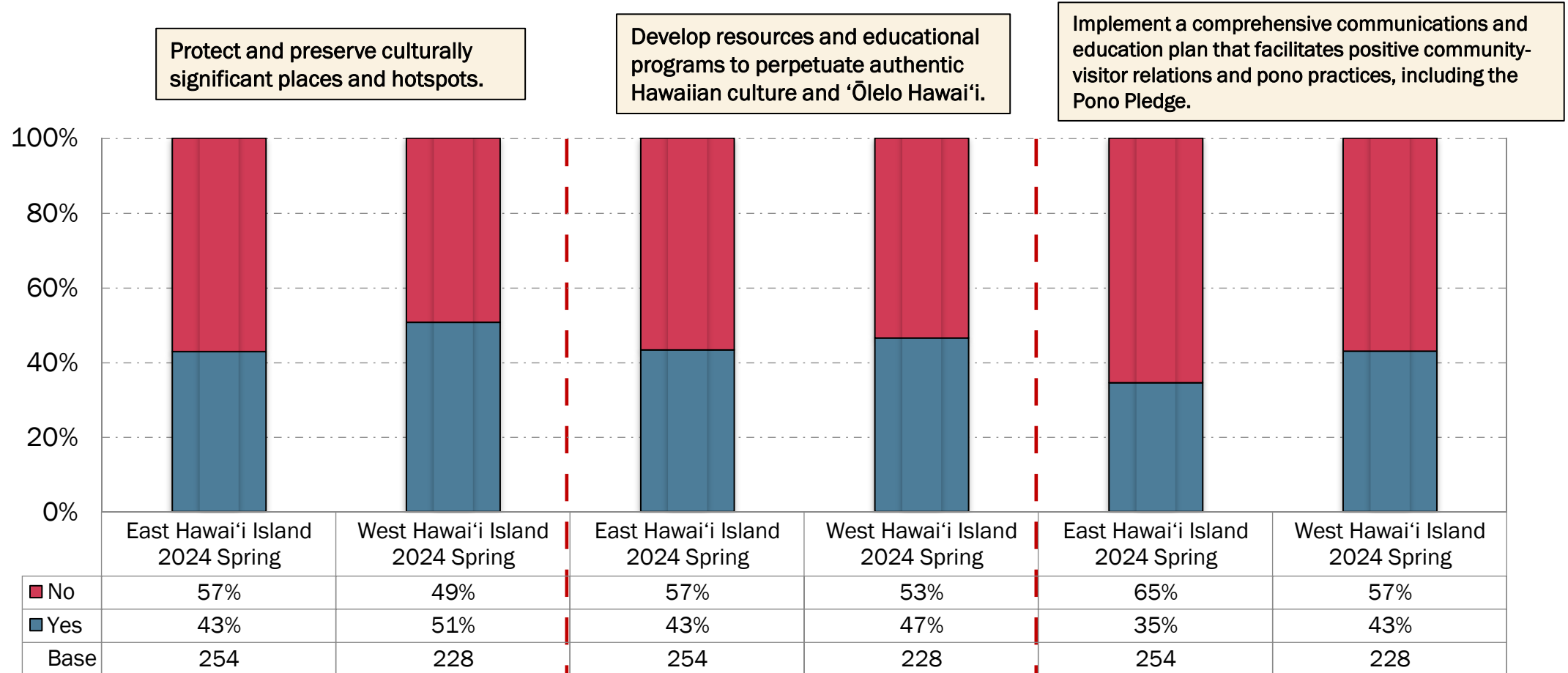
ALL Hawai'i Island residents: 57% aware of at least one initiative



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: 482)

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: 482)

Awareness of Specific DMAP Action Plans – *By Hawai'i Island Area*



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

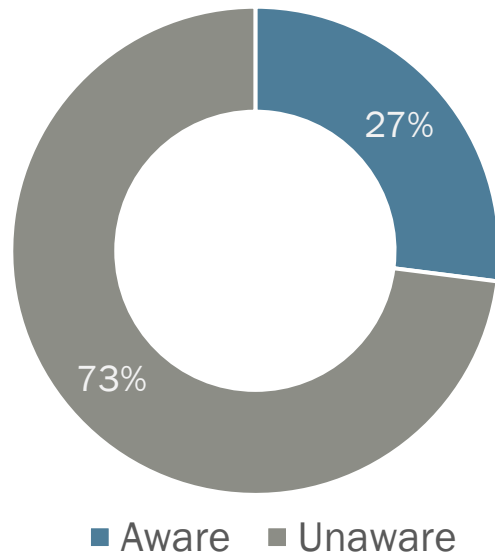


Hawai‘i Tourism Authority’s Destination Management Action Plan: Maui County (Spring 2023 - 2024)

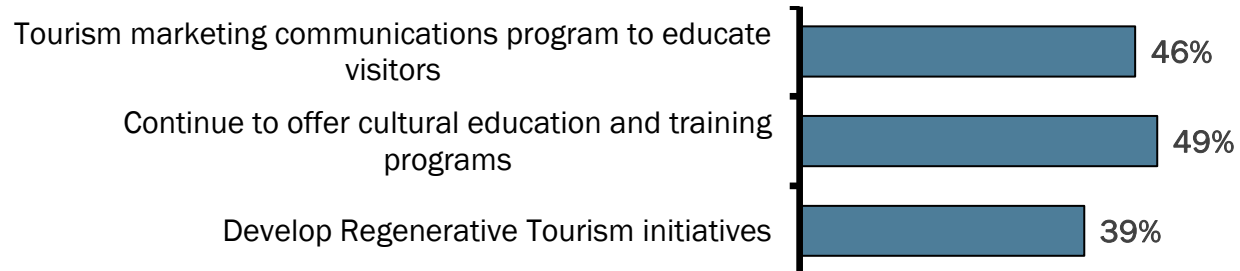
Destination Management Action Plans Awareness: Maui County

% Aware of HTA Destination Management Action Plans

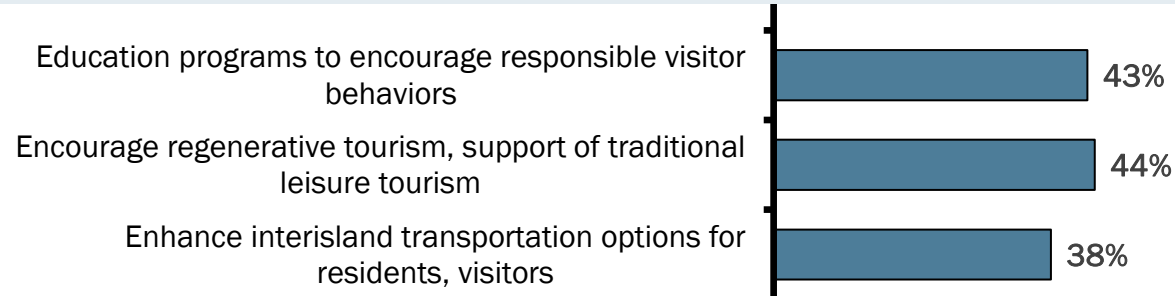
▼ 9-point decline from Spring 2023



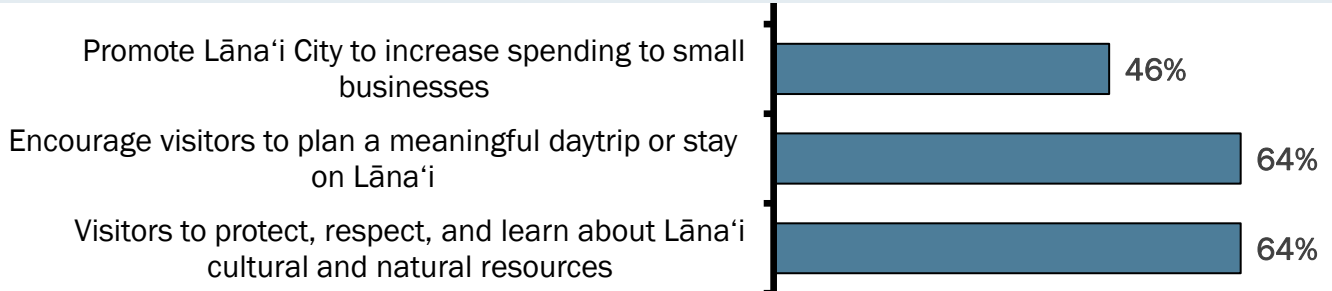
ALL Maui residents: 58% aware of at least one initiative



ALL Moloka'i residents: 48% aware of at least one initiative



ALL Lāna'i residents: 64% aware of at least one initiative

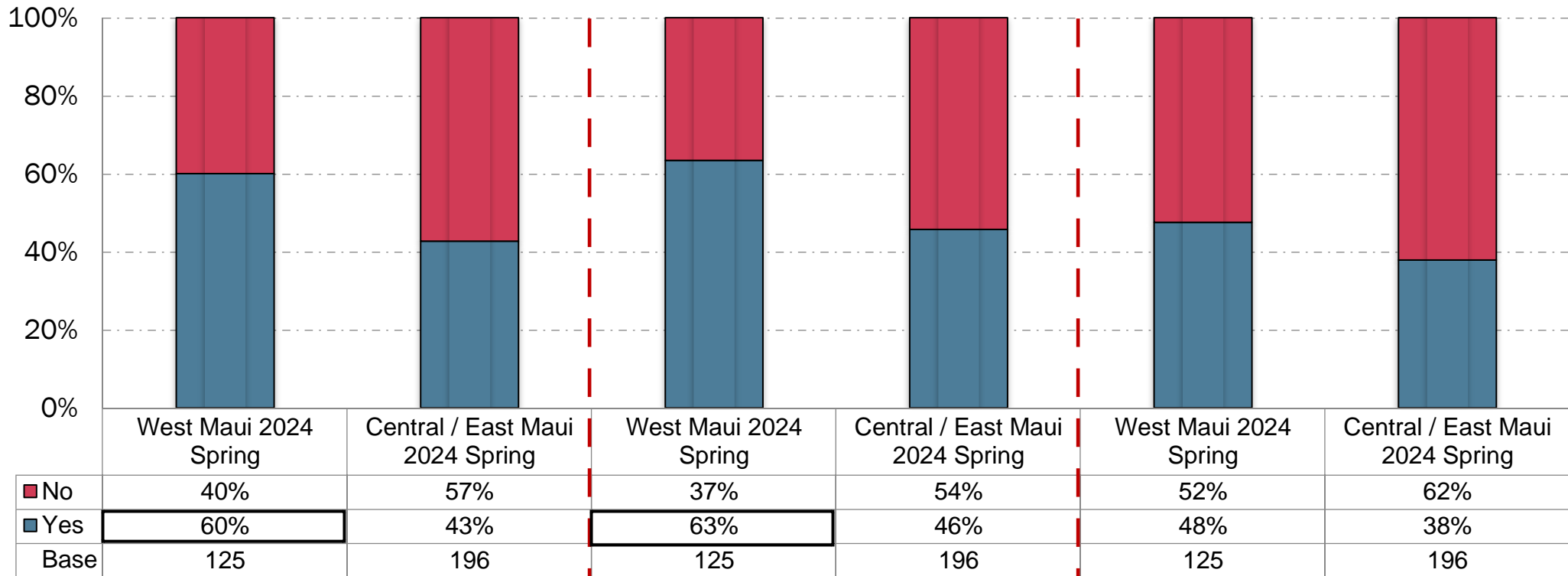


Awareness of Specific DMAP Action Plans – *By Island of Maui Area*

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

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

Develop Regenerative Tourism initiatives.



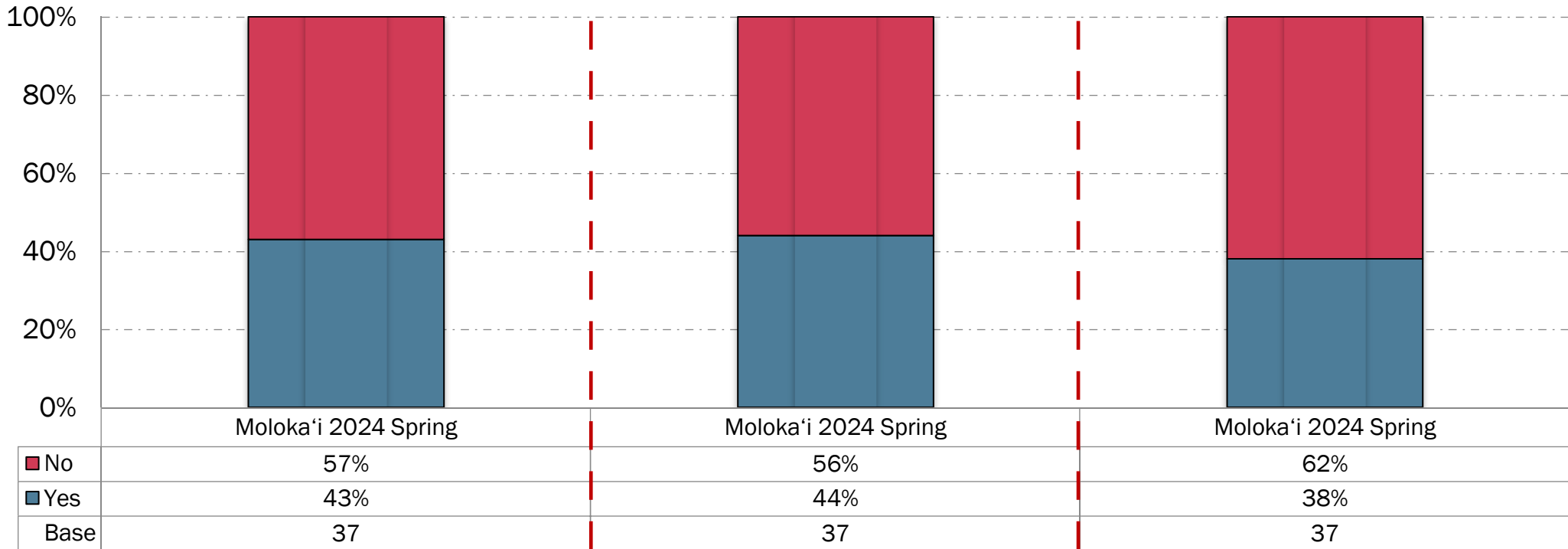
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

Awareness of Specific DMAP Action Plans – *By Island of Moloka‘i*

Develop communication and education programs to encourage responsible visitor behaviors.

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

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



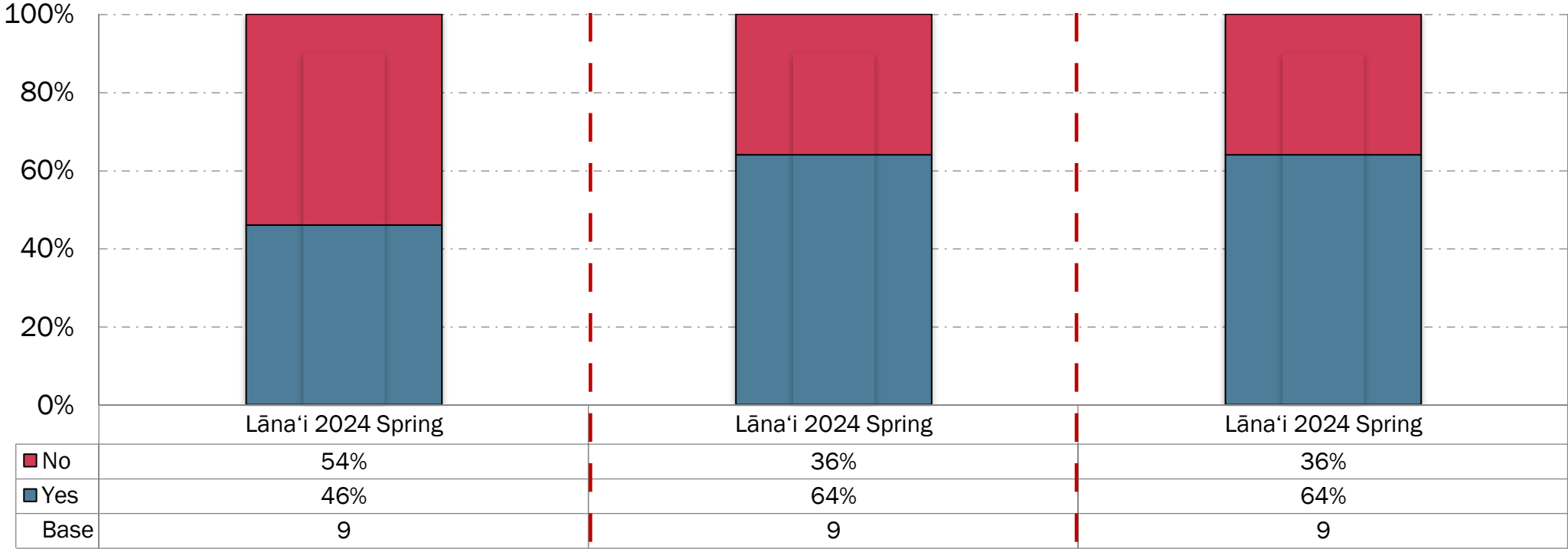
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

Awareness of Specific DMAP Action Plans – *By Island of Lānaʻi*

Promote Lānaʻi City to increase spending that goes to residents and small businesses.

Encourage and enable visitors to plan a meaningful daytrip or stay on Lānaʻi that is respectful to the land, the people and the lifestyle on Lānaʻi.

Develop and implement a process whereby visitors to Lānaʻi acknowledge to protect, respect, and learn about Lānaʻi cultural and natural resources, and community during their visit through the Mālama Maui County Pledge.



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



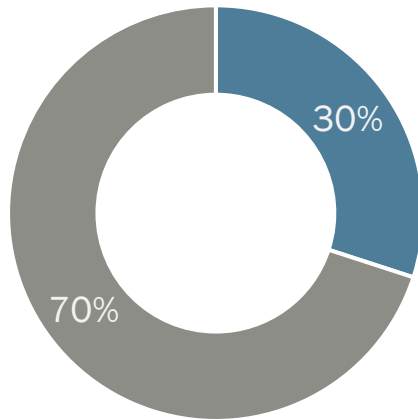
Hawai‘i Tourism Authority’s Destination Management Action Plan: Kaua‘i (Spring 2023 - 2024)

Destination Management Action Plans Awareness: Kaua'i

Nearly one-in-three (30%) are aware of HTA's Destination Management Action Plans, a 7-point improvement from the previous period. More than half (56%) were aware of at least one Destination Stewardship initiative, such as policy efforts to instill appropriate behavior for visitors/residents, policies that address overtourism, or educational materials for visitors/new residents to have respect for local cultural values.

% Aware of HTA Destination Management Action Plans

▲ 7-point improvement from Fall 2022



■ Aware ■ Unaware

ALL Kaua'i residents: 56% aware of at least one plan

Focus policy efforts on appropriate behavior that will instill value in both visitors and residents for our natural and cultural resources

44%

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

34%

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

46%

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

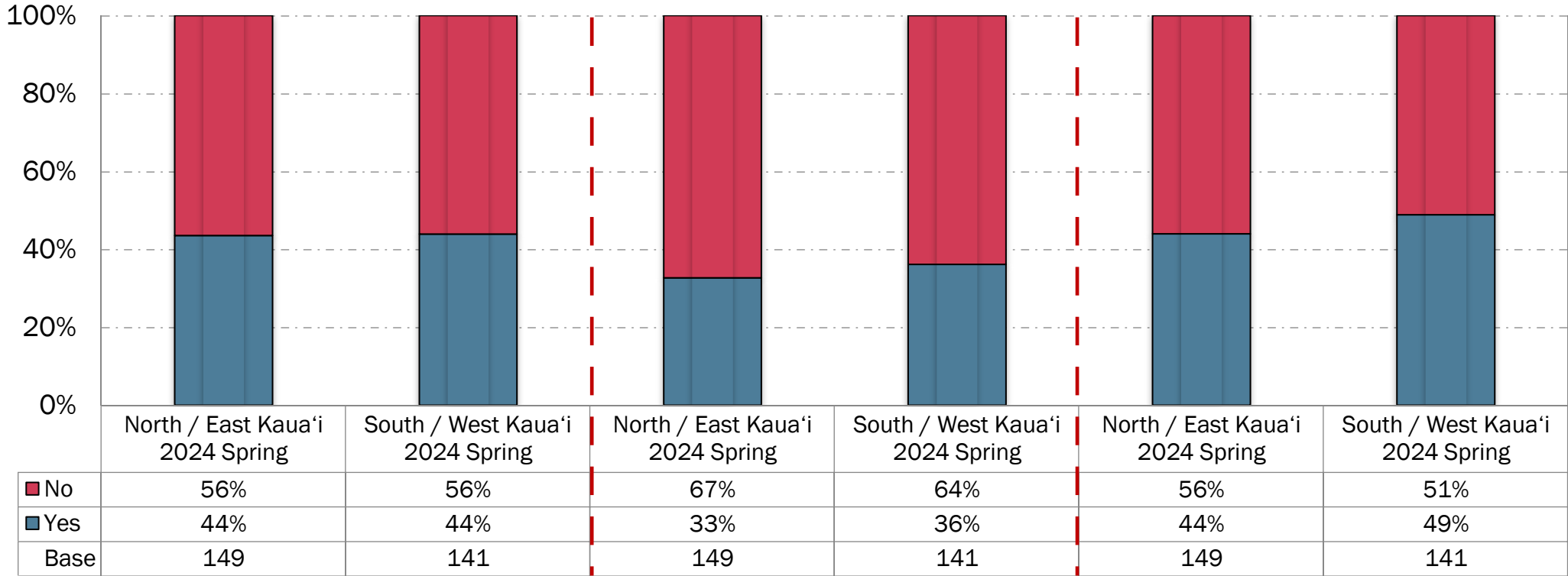
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 290)

Awareness of Specific DMAP Action Plans – *By Island of Kaua‘i Area*

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

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

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

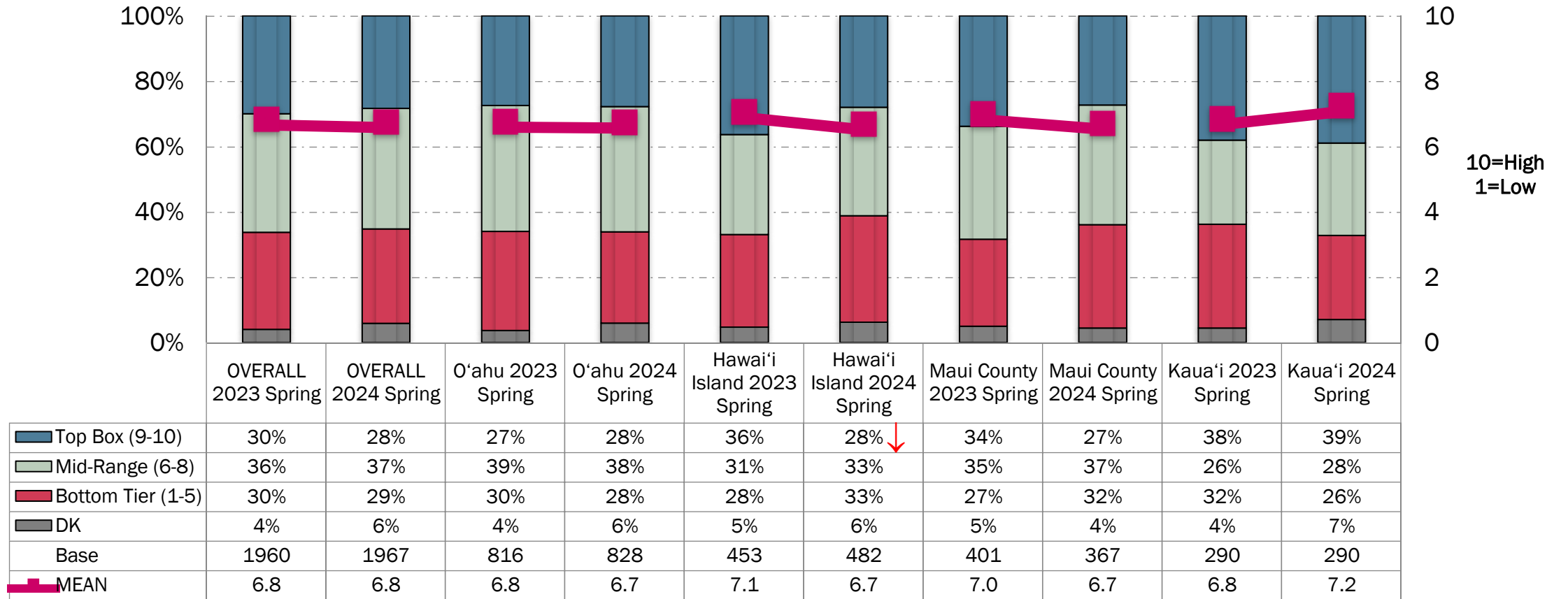


Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



Tax Revenues to Manage/Encourage Tourism (Spring 2023 - 2024)

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

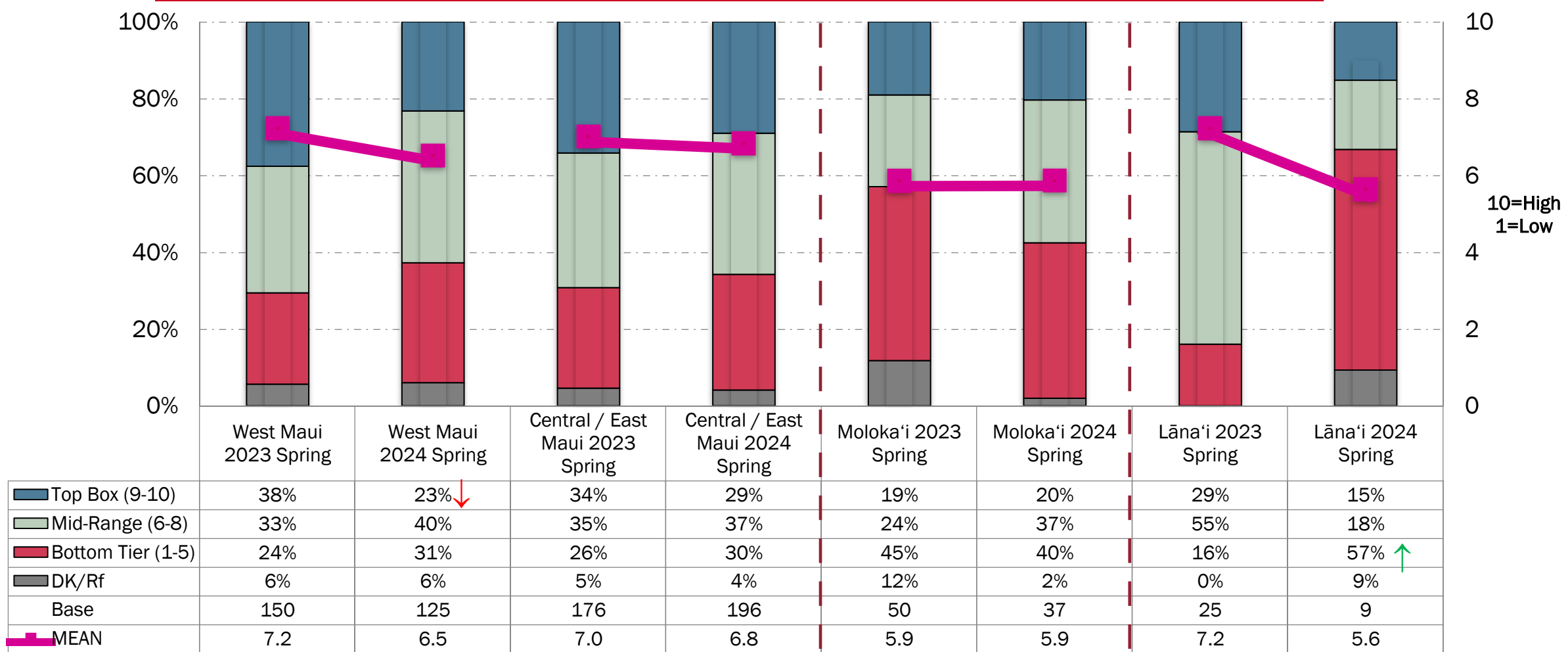


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

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



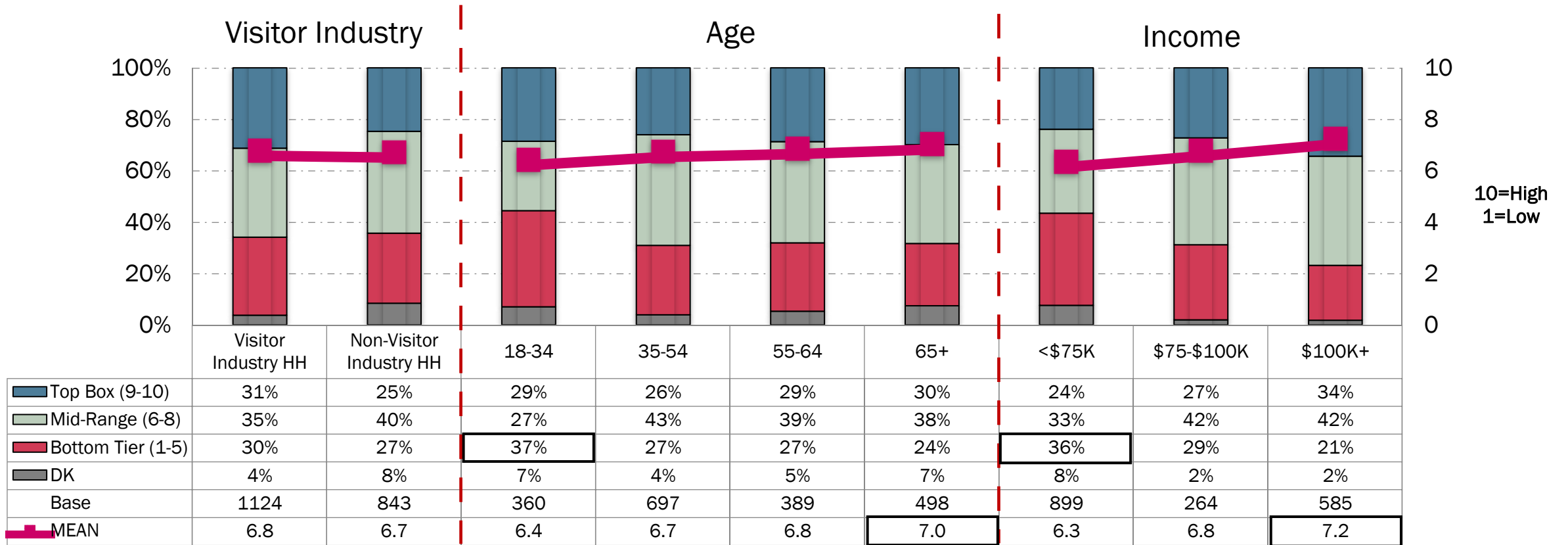
“Tax dollars should be spent to MANAGE the impacts of tourism in my community” - *By Area (Maui County)*



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

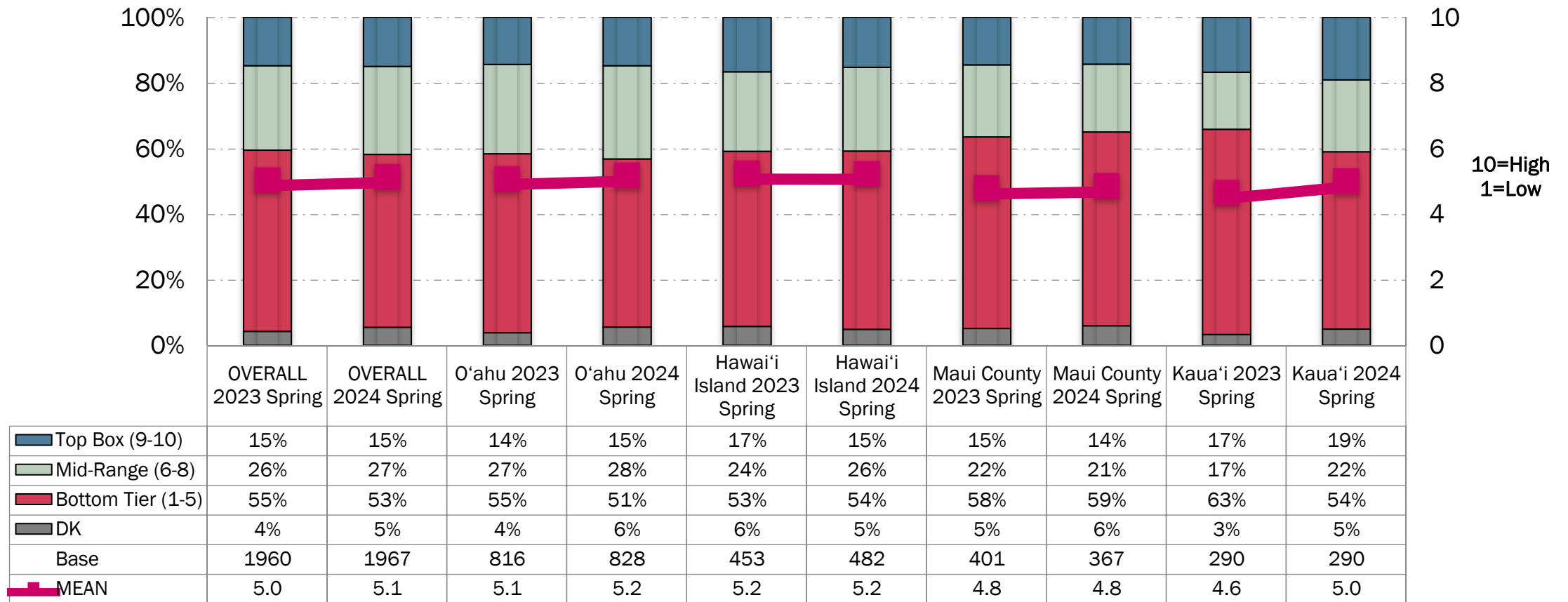


“Tax dollars should be spent to MANAGE the impacts of tourism in my community” – *By Demographics*



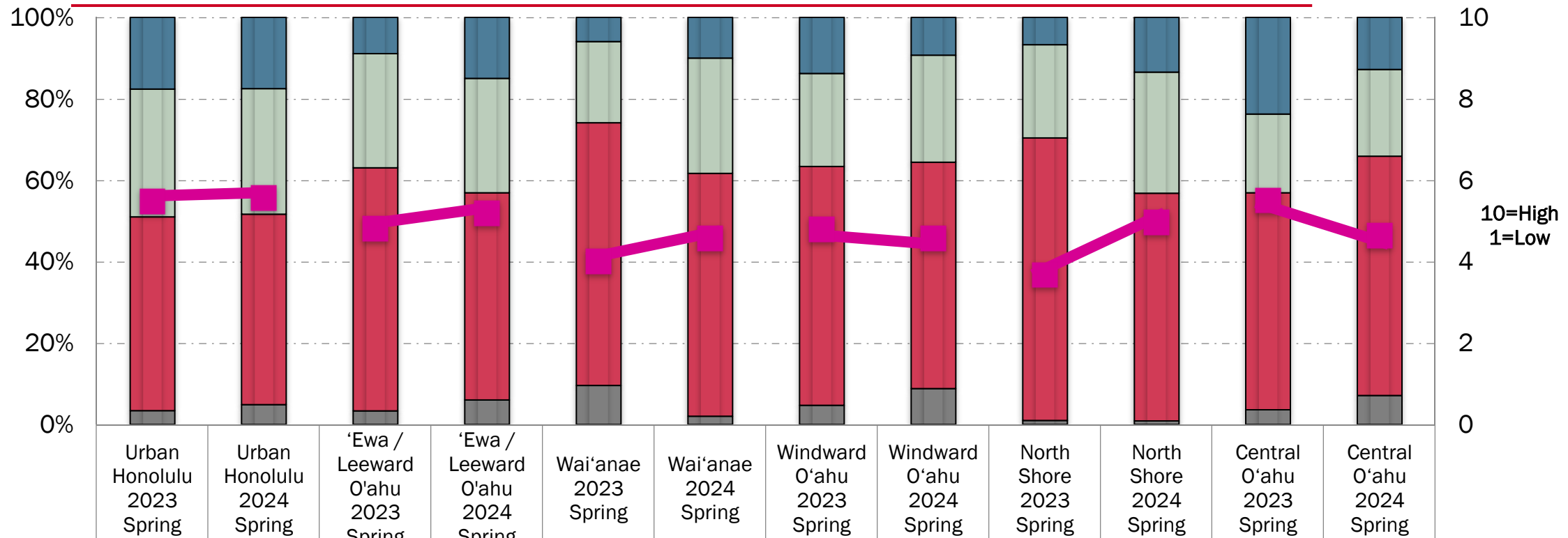
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

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



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

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



	Urban Honolulu 2023 Spring	Urban Honolulu 2024 Spring	'Ewa / Leeward O'ahu 2023 Spring	'Ewa / Leeward O'ahu 2024 Spring	Wai'anae 2023 Spring	Wai'anae 2024 Spring	Windward O'ahu 2023 Spring	Windward O'ahu 2024 Spring	North Shore 2023 Spring	North Shore 2024 Spring	Central O'ahu 2023 Spring	Central O'ahu 2024 Spring
■ Top Box (9-10)	18%	18%	9%	15%	6%	10%	14%	9%	7%	13%	24%	13%
■ Mid-Range (6-8)	31%	31%	28%	28%	20%	28%	23%	26%	23%	30%	19%	21%
■ Bottom Tier (1-5)	48%	47%	60%	51%	65%	60%	59%	56%	69%	56%	53%	59%
■ DK/Rf	3%	5%	3%	6%	10%	2%	5%	9%	1%	1%	4%	7%
Base	300	300	150	152	79	84	125	125	80	82	82	85
■ MEAN	5.5	5.6	4.8	5.2	4.0	4.6	4.8	4.6	3.7	5.0	5.5	4.6

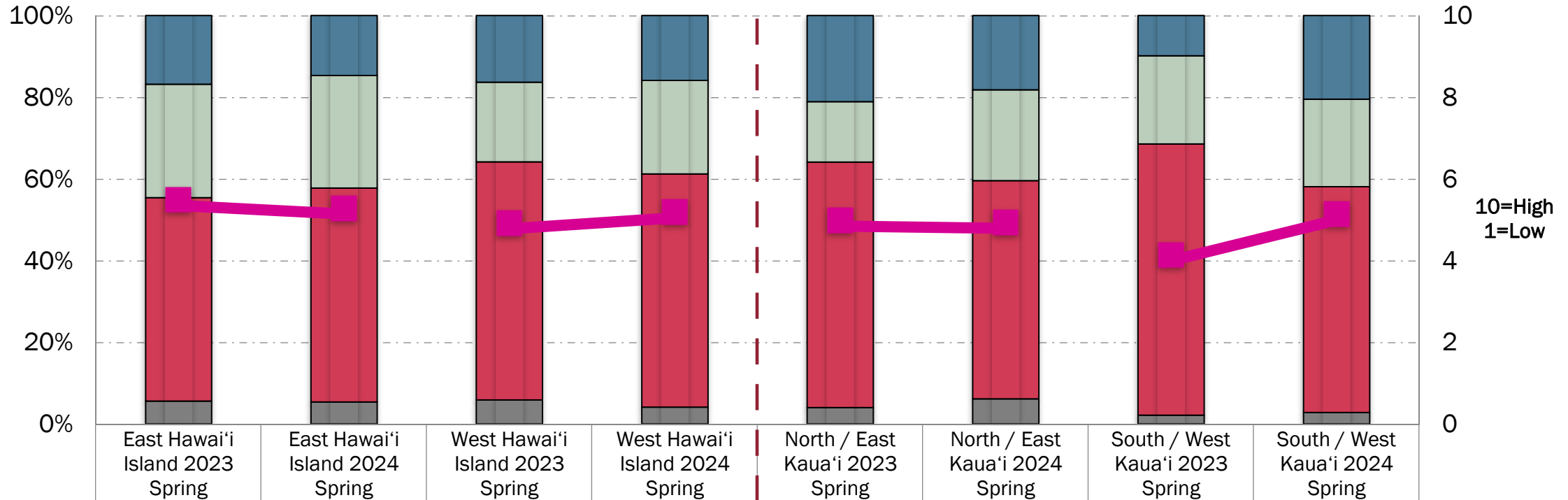
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



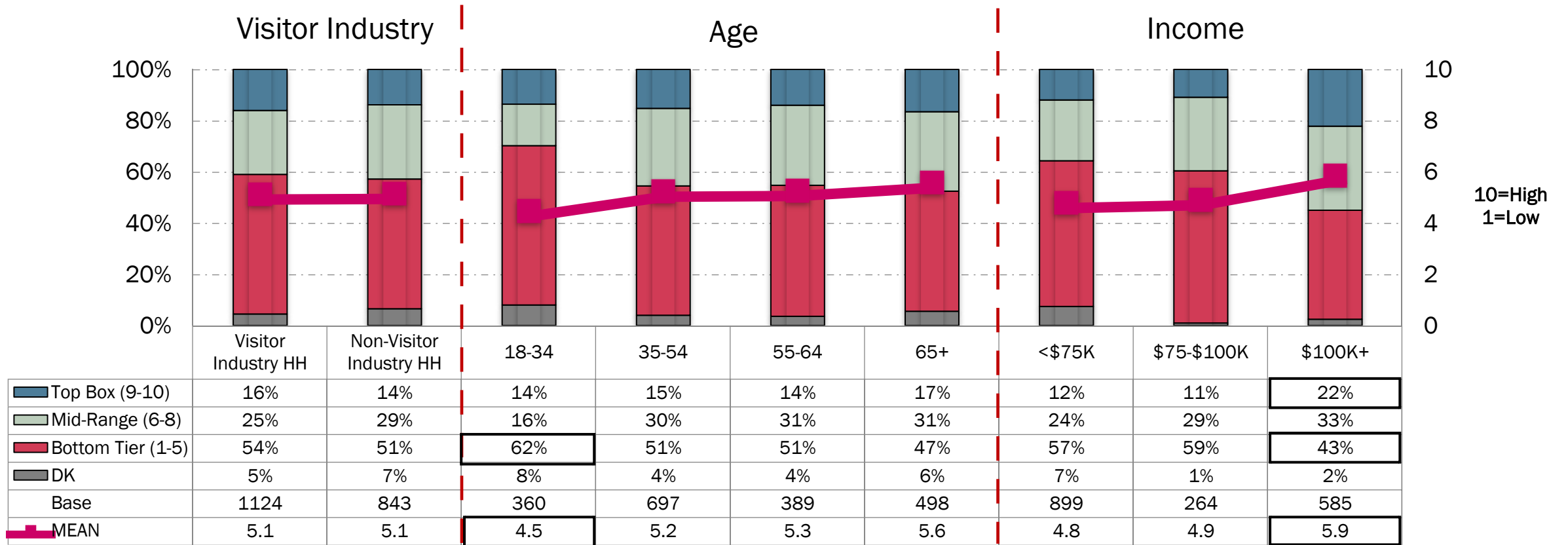
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



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

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

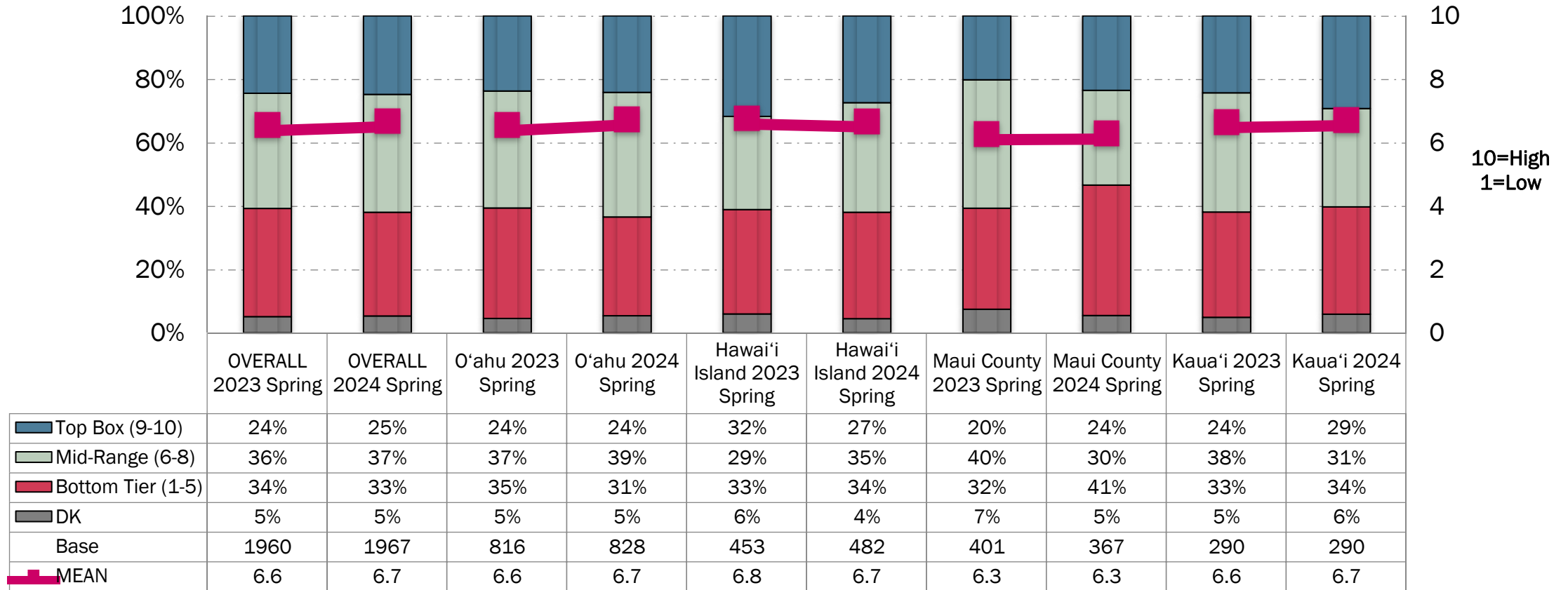


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]



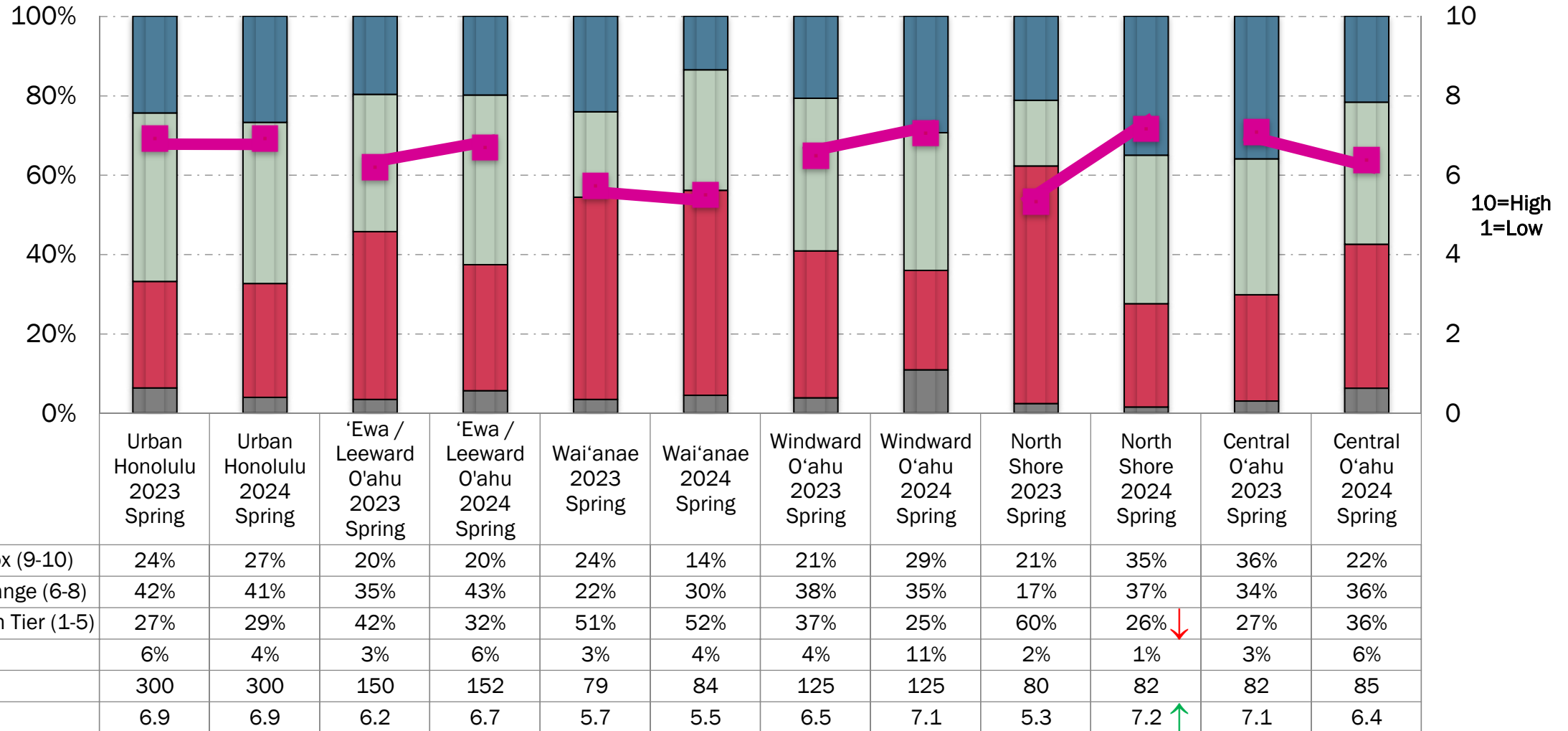
Tourism Worth the Issues (Spring 2023 - 2024)

“I feel like tourism is worth the issues associated with the industry” – *By County*



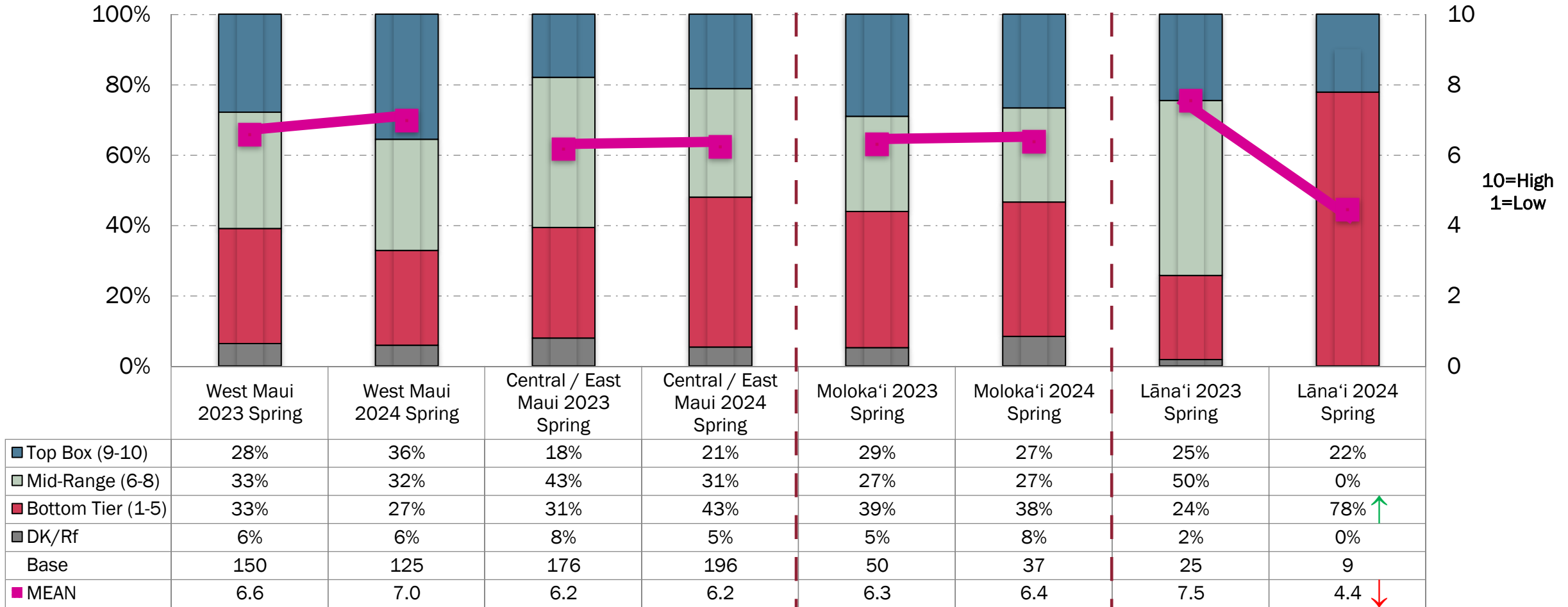
Q3. In 2023, visitors spent nearly \$21 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



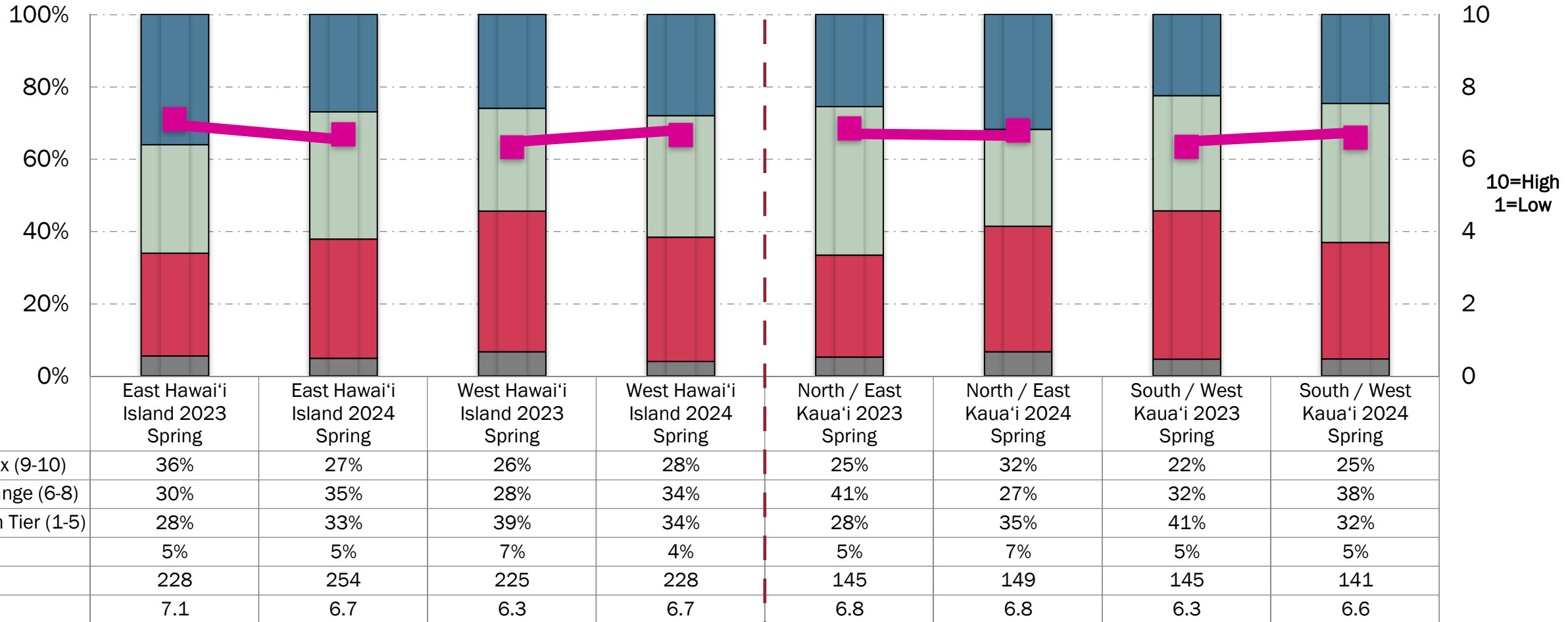
Q3. In 2023, visitors spent nearly \$21 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



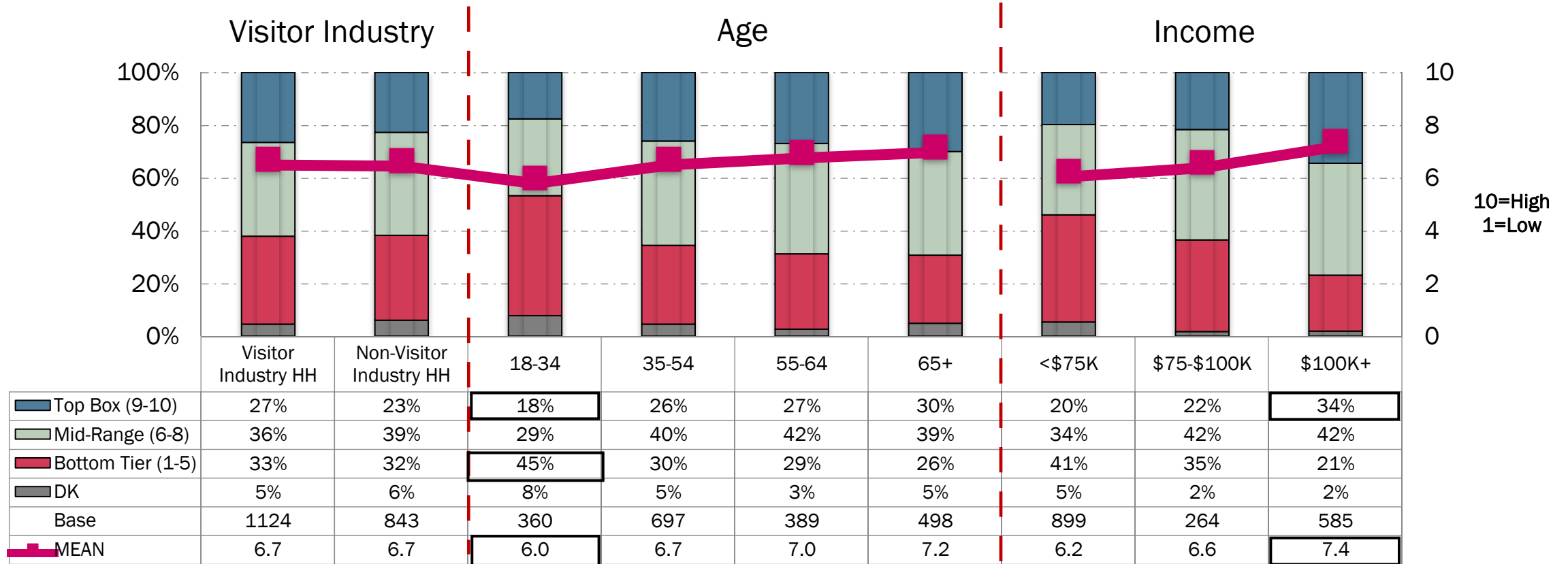
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“I feel like tourism is worth the issues associated with the industry” – By Demographics

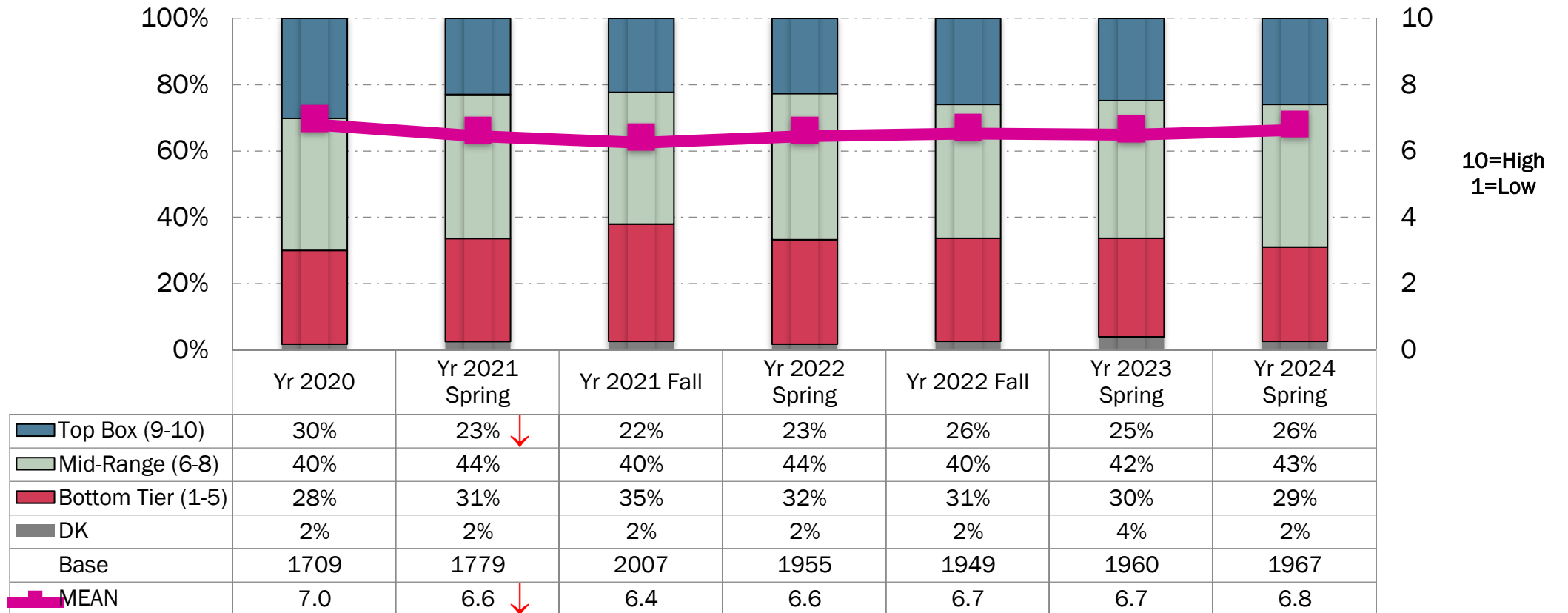


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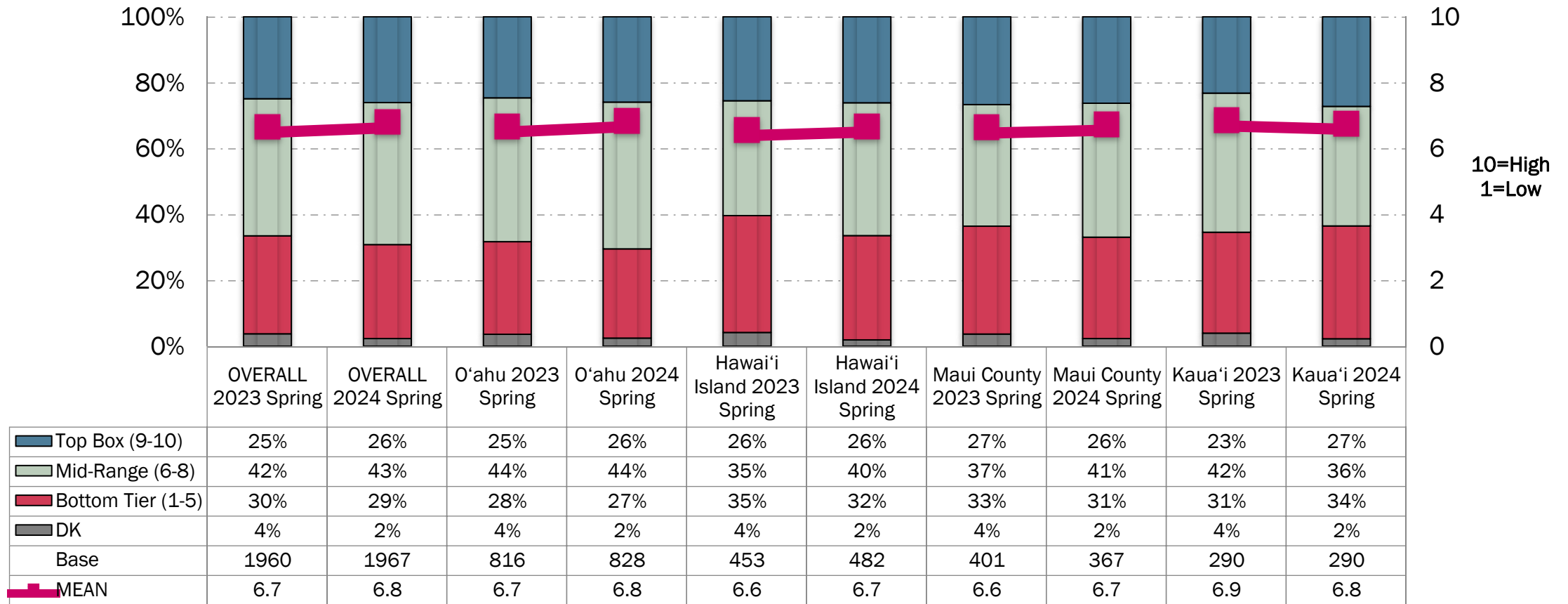
General Perceptions of the Visitor Industry

Perception of Tourism Industry in Hawai'i - Overall



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

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



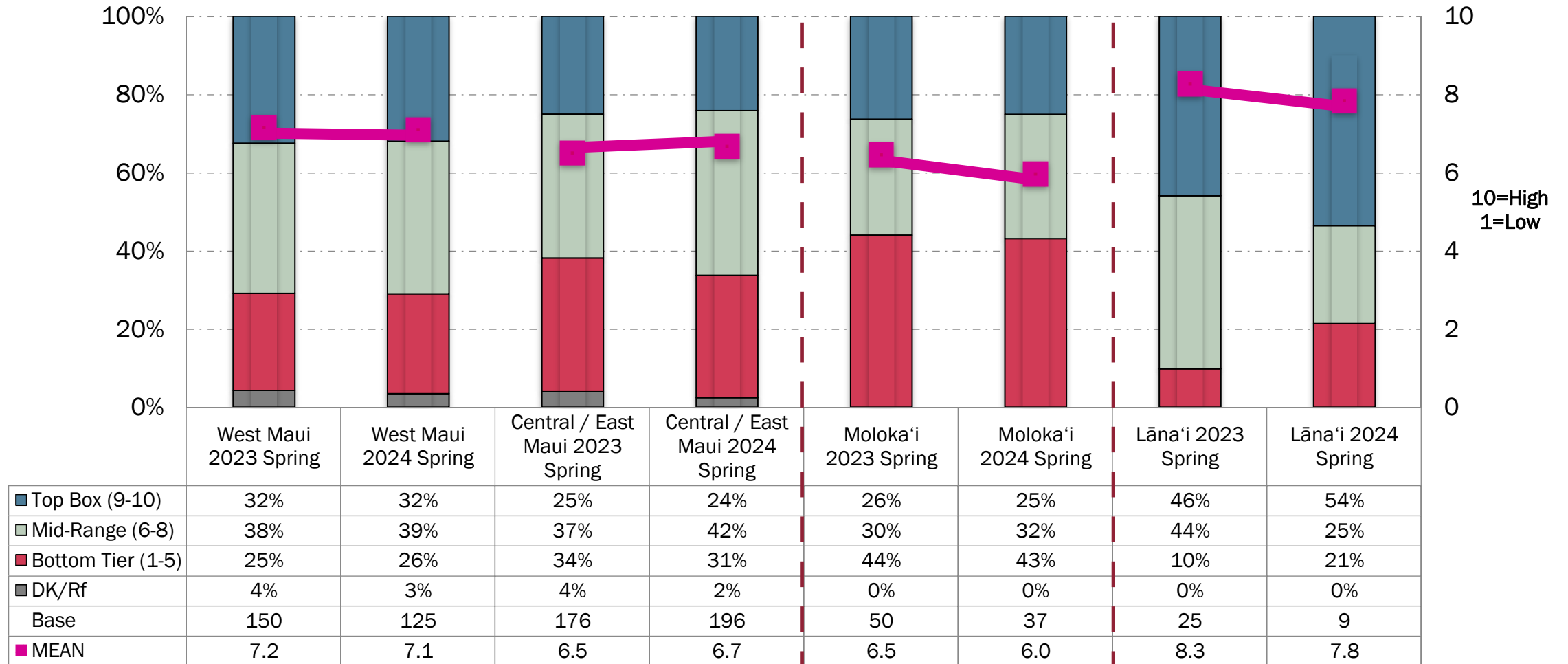
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Perception of Tourism Industry in Hawai'i - *By Area (O'ahu)*



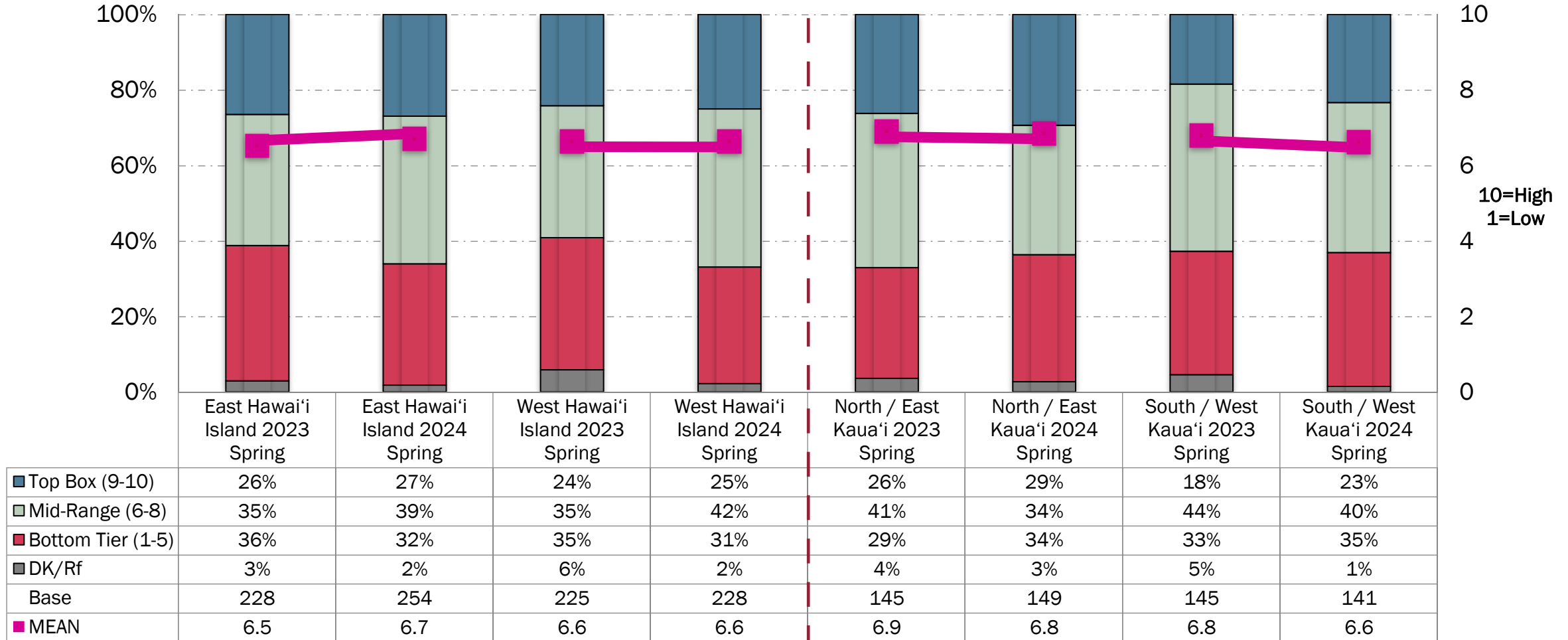
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Perception of Tourism Industry in Hawai'i – By Area (Maui County)



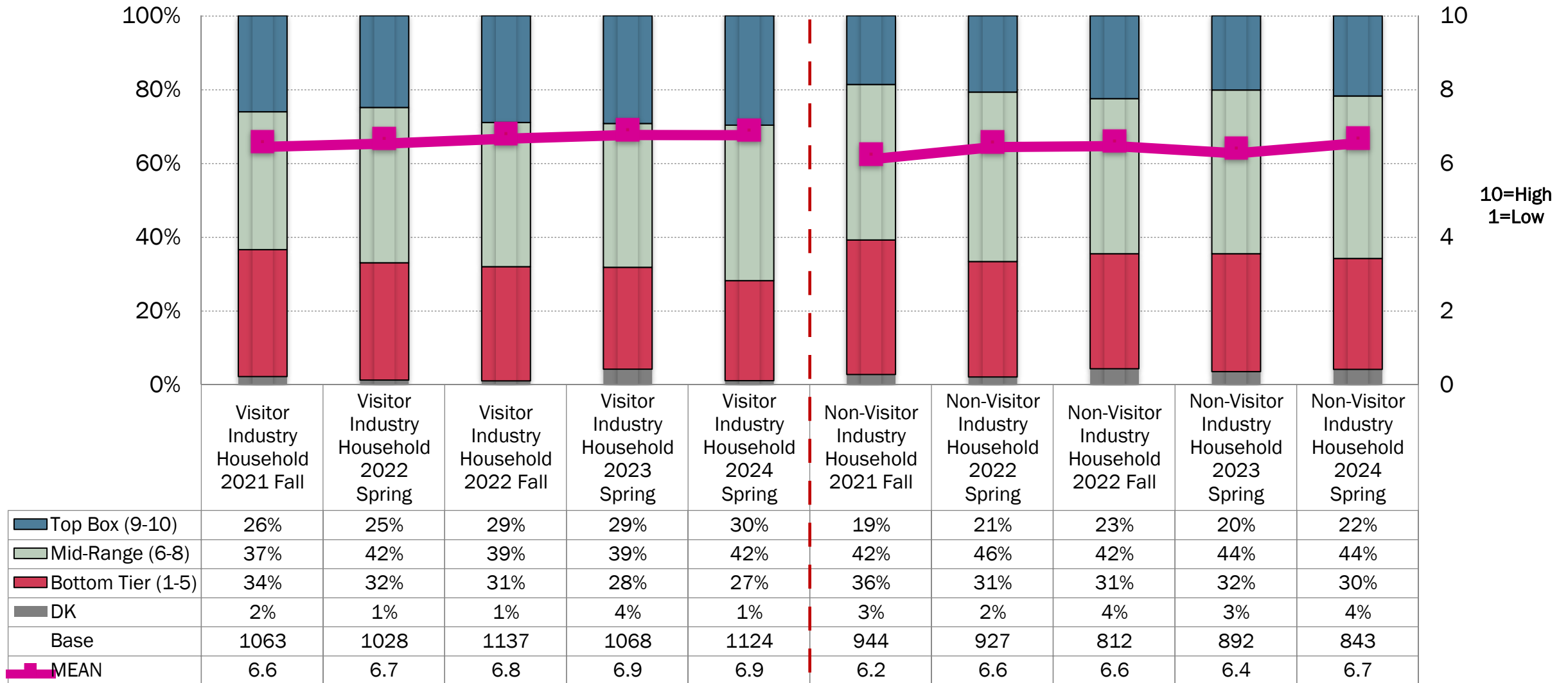
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



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

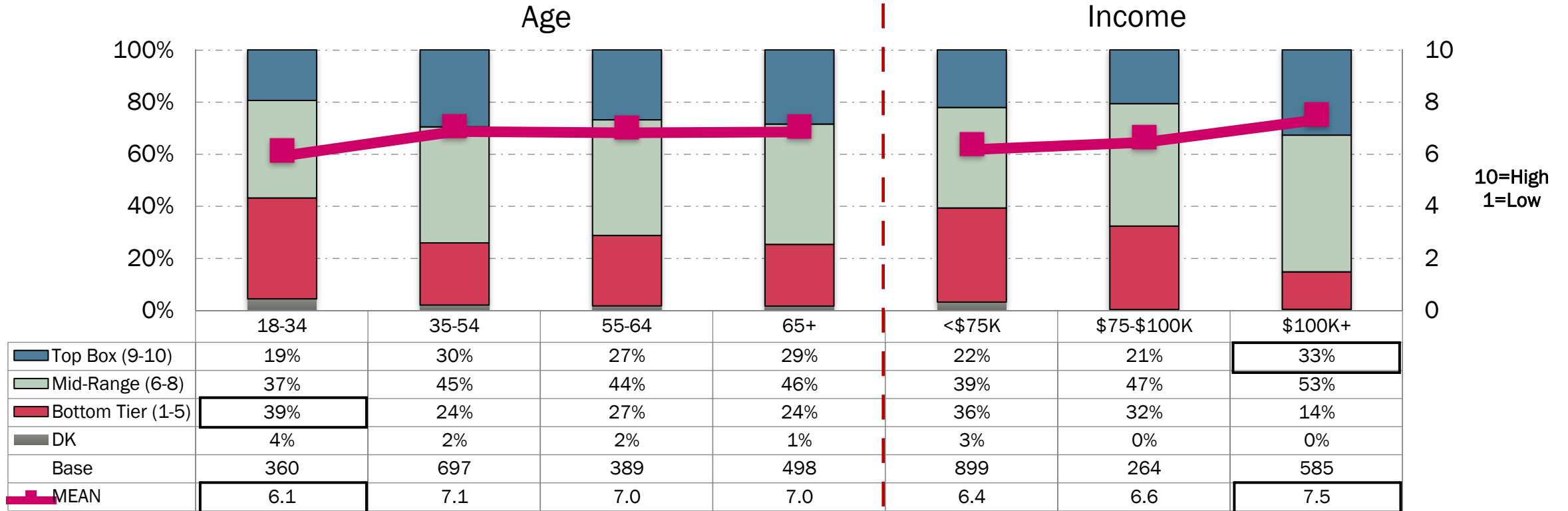
Perception of Tourism Industry in Hawai'i - Visitor Industry Household vs Non-Visitor Industry Household



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

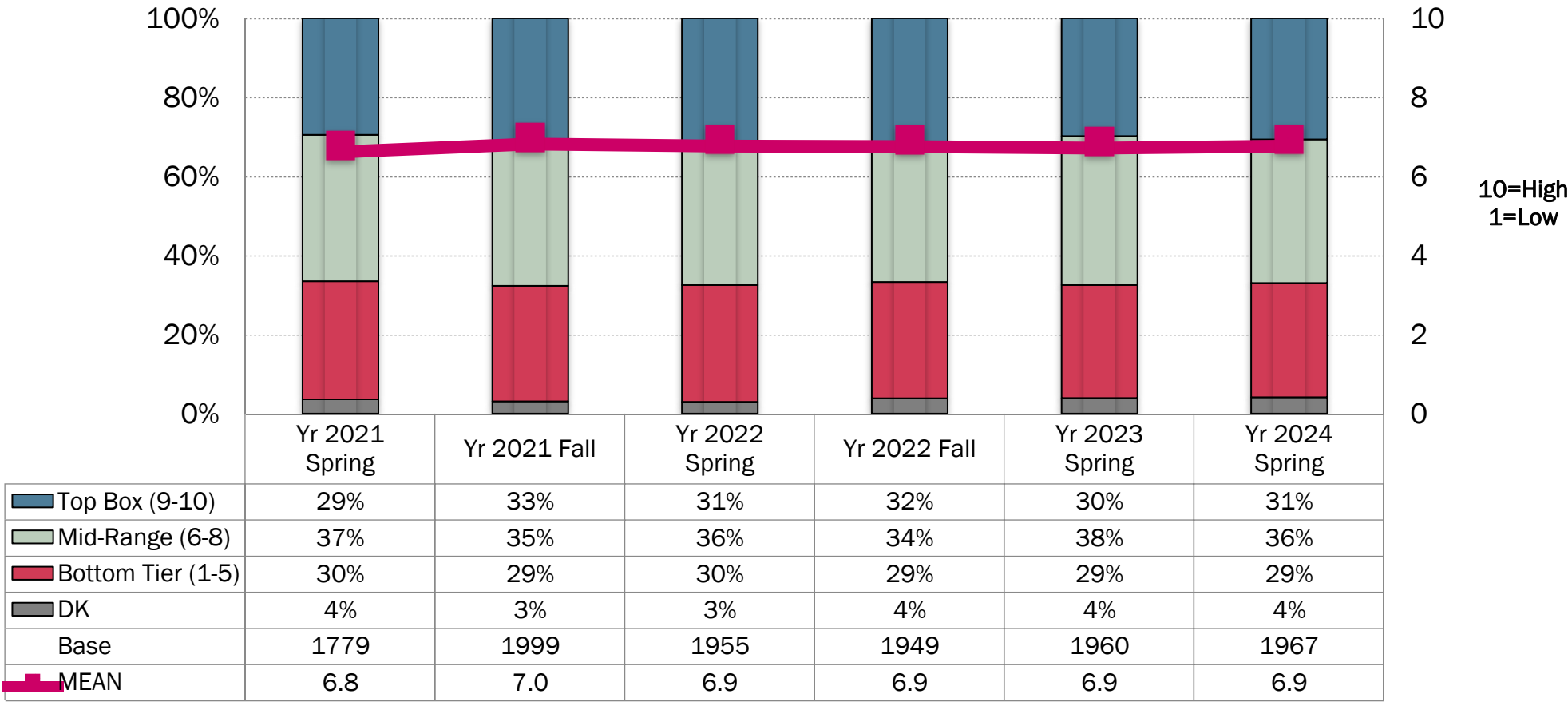
Perception of Tourism Industry in Hawai'i

- *By Demographics*



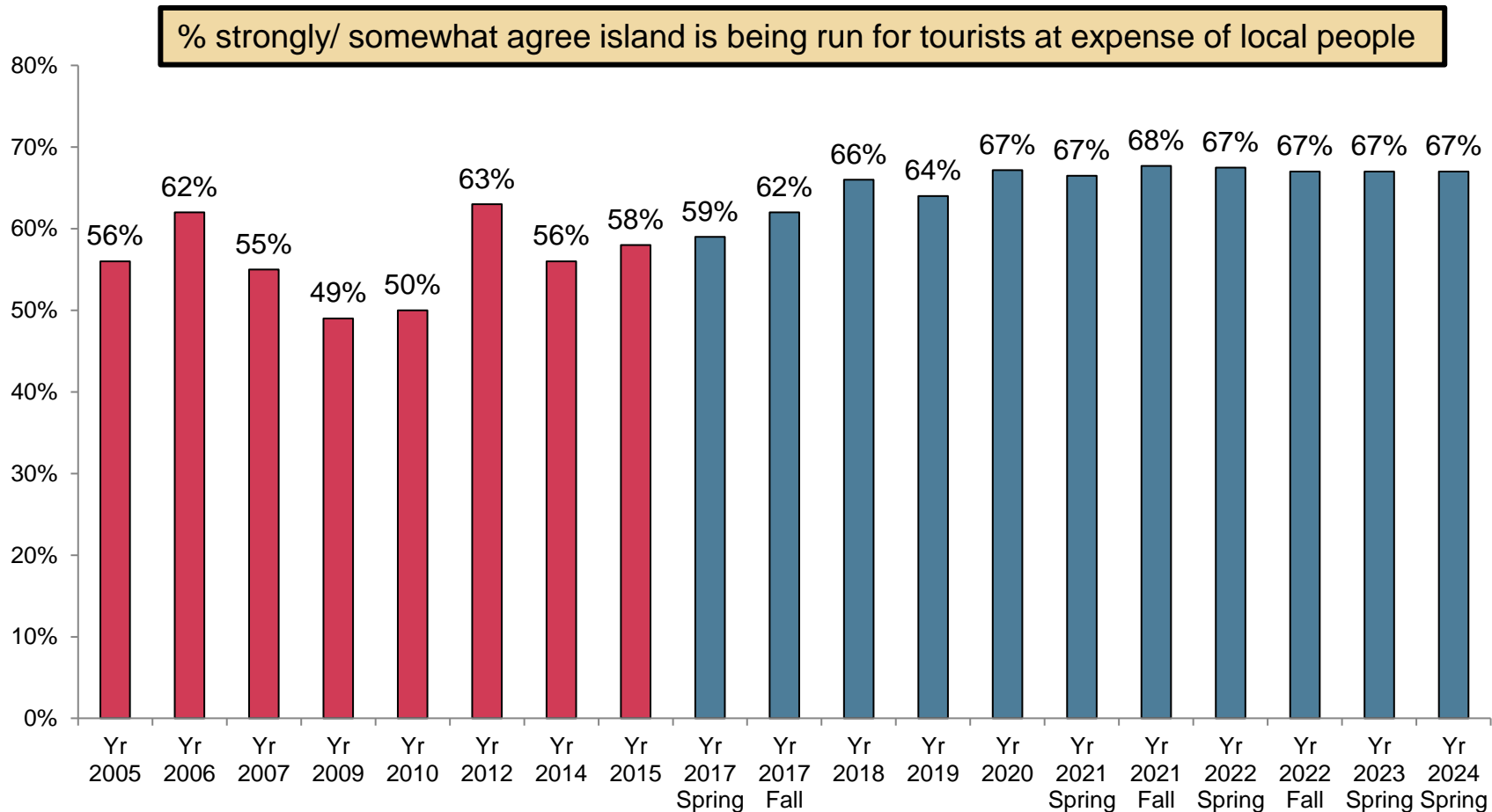
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of Tourism as an industry in Hawai'i.

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



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

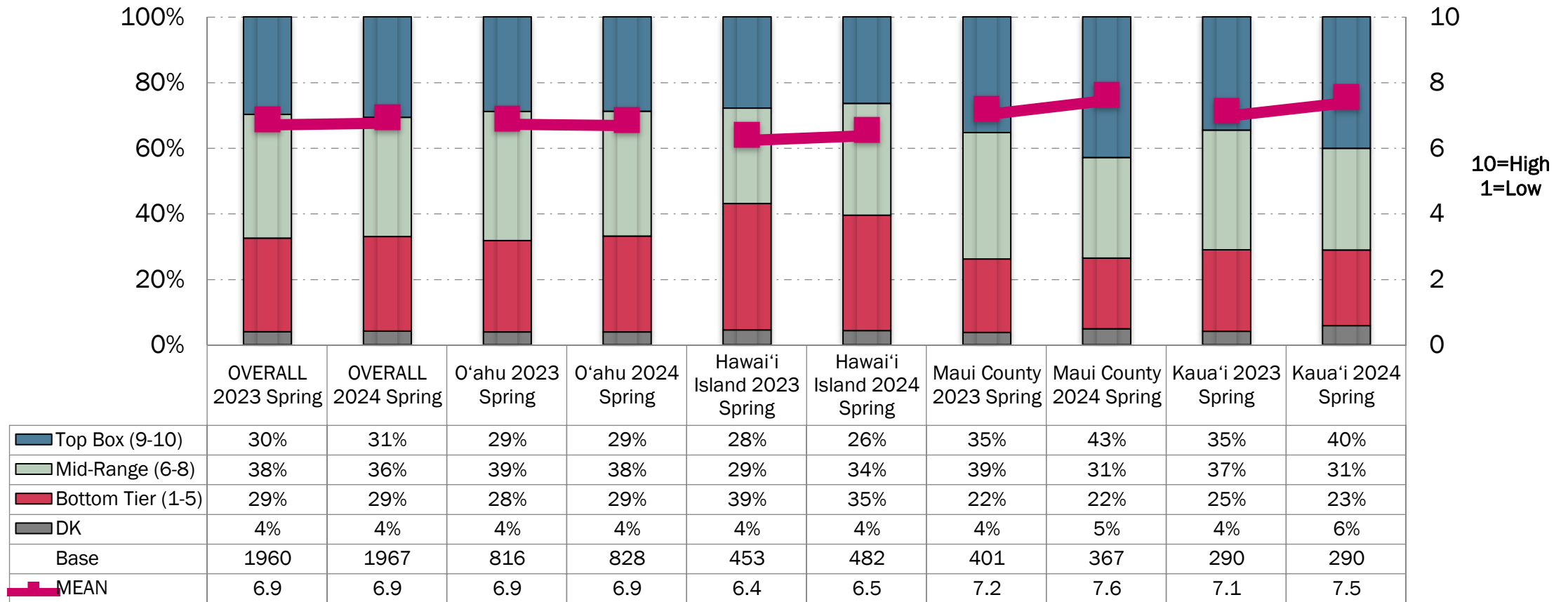
“This island is being run for tourists at the expense of local people” - Overall



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

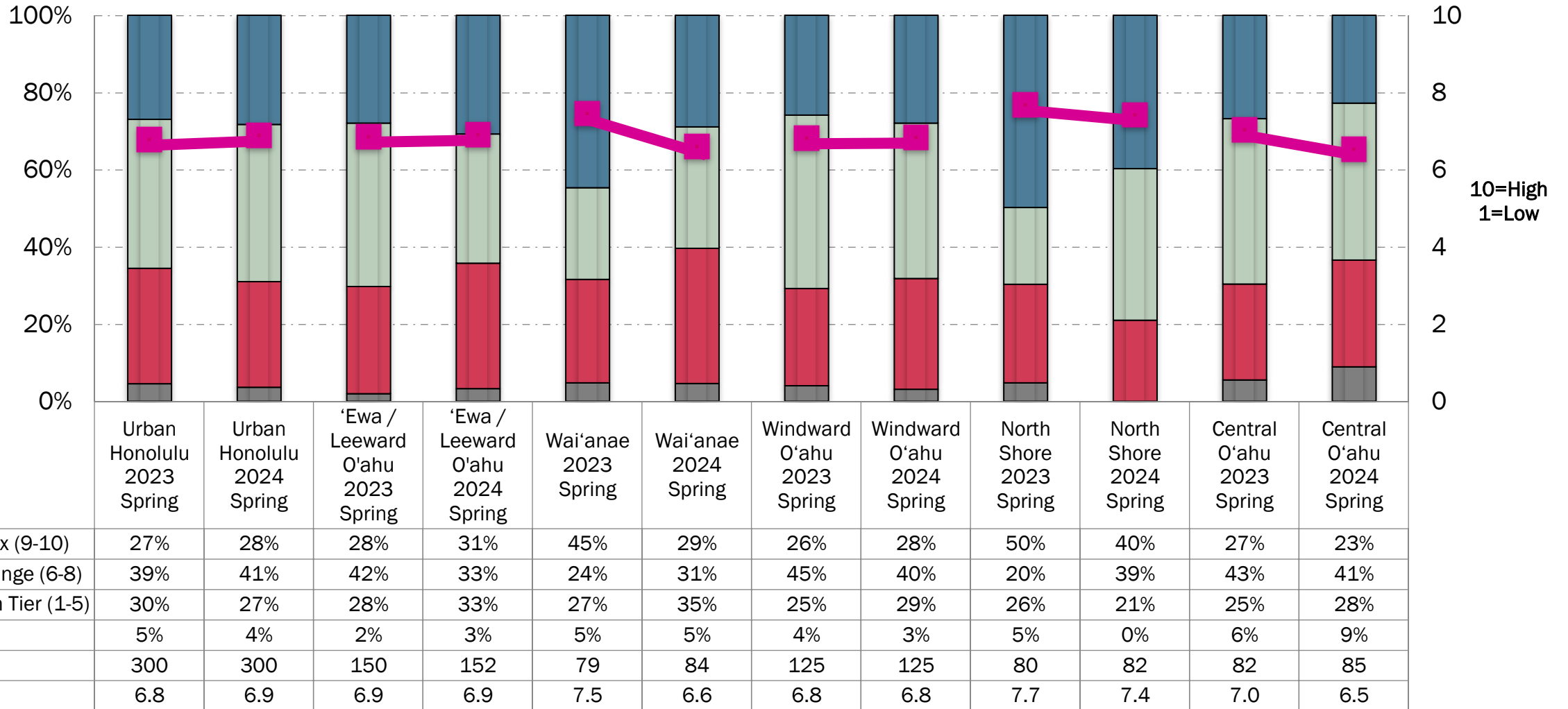
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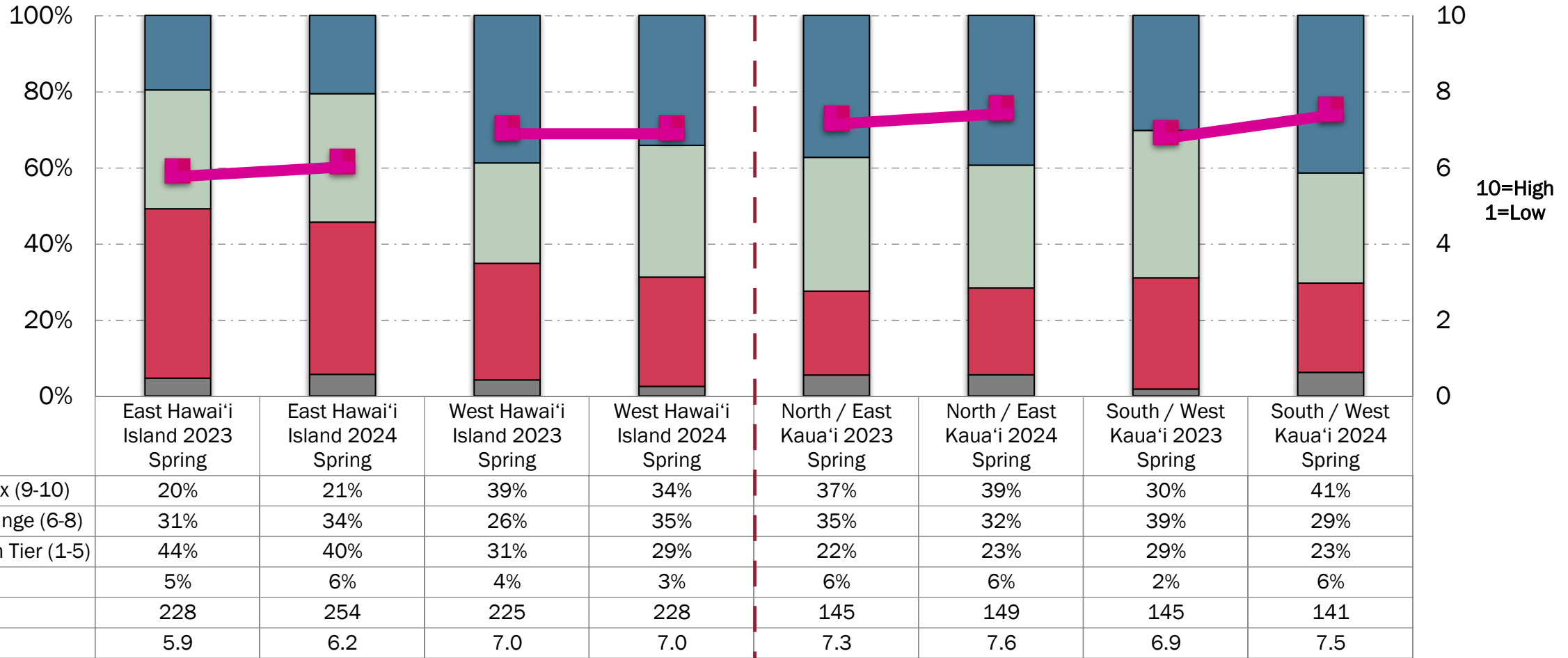
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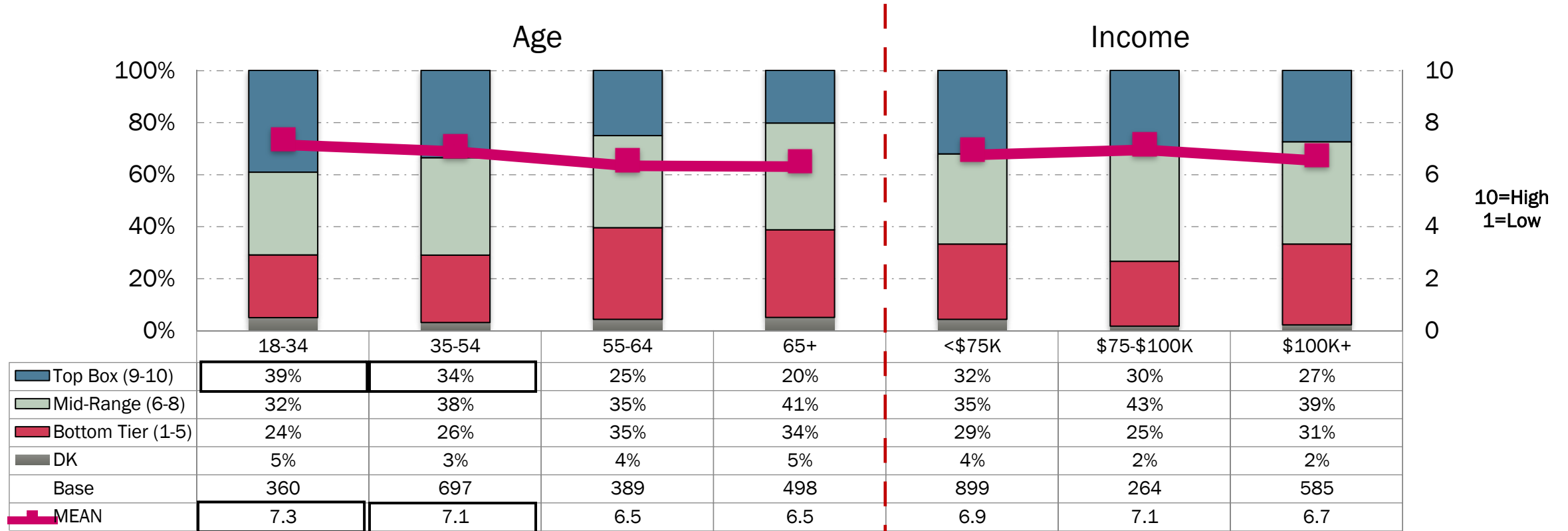
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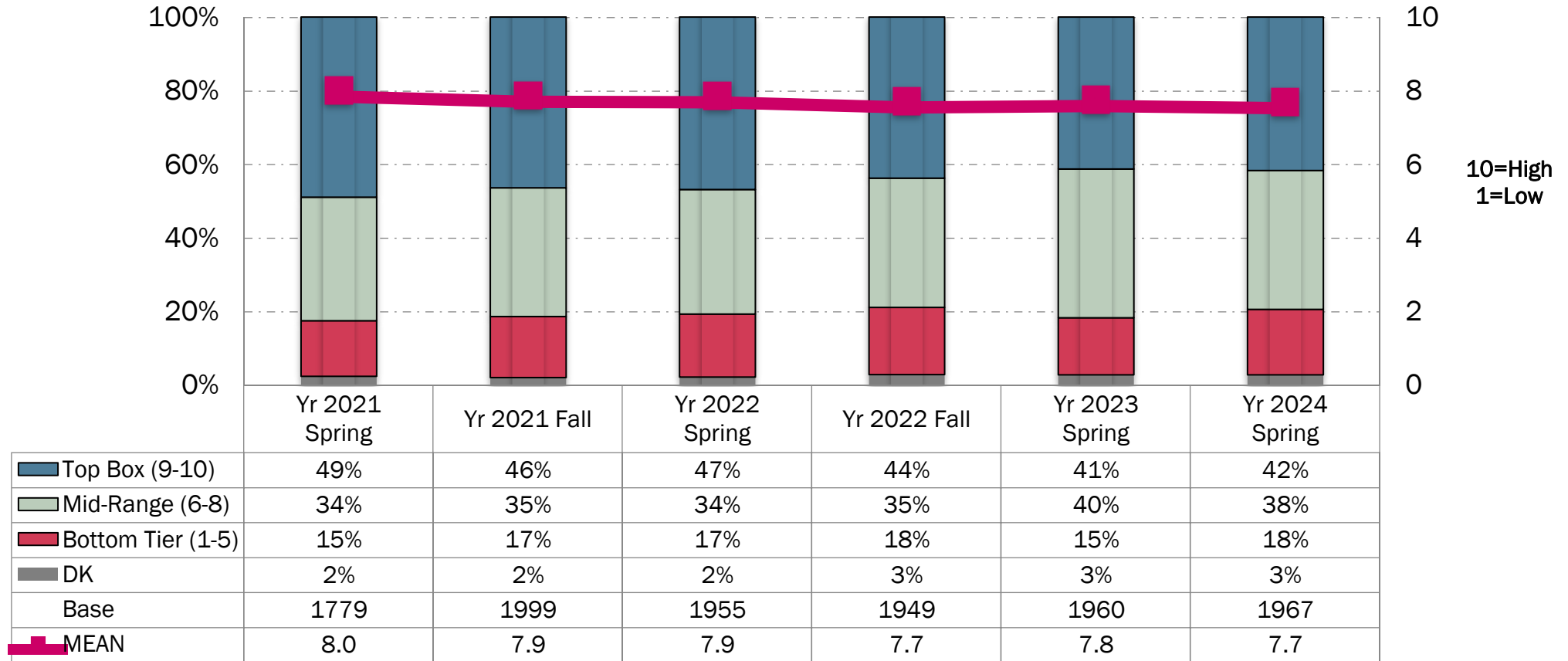
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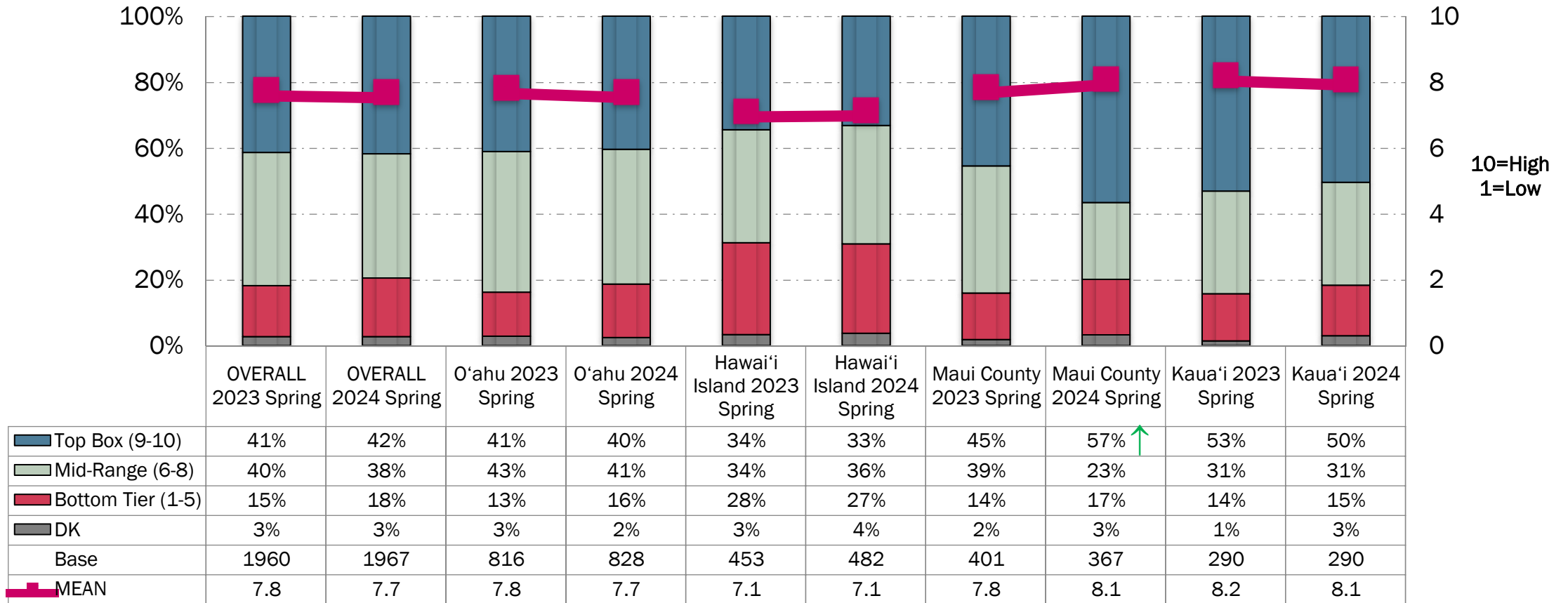
Q4.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“My island’s economy is too dependent on tourism” – Overall



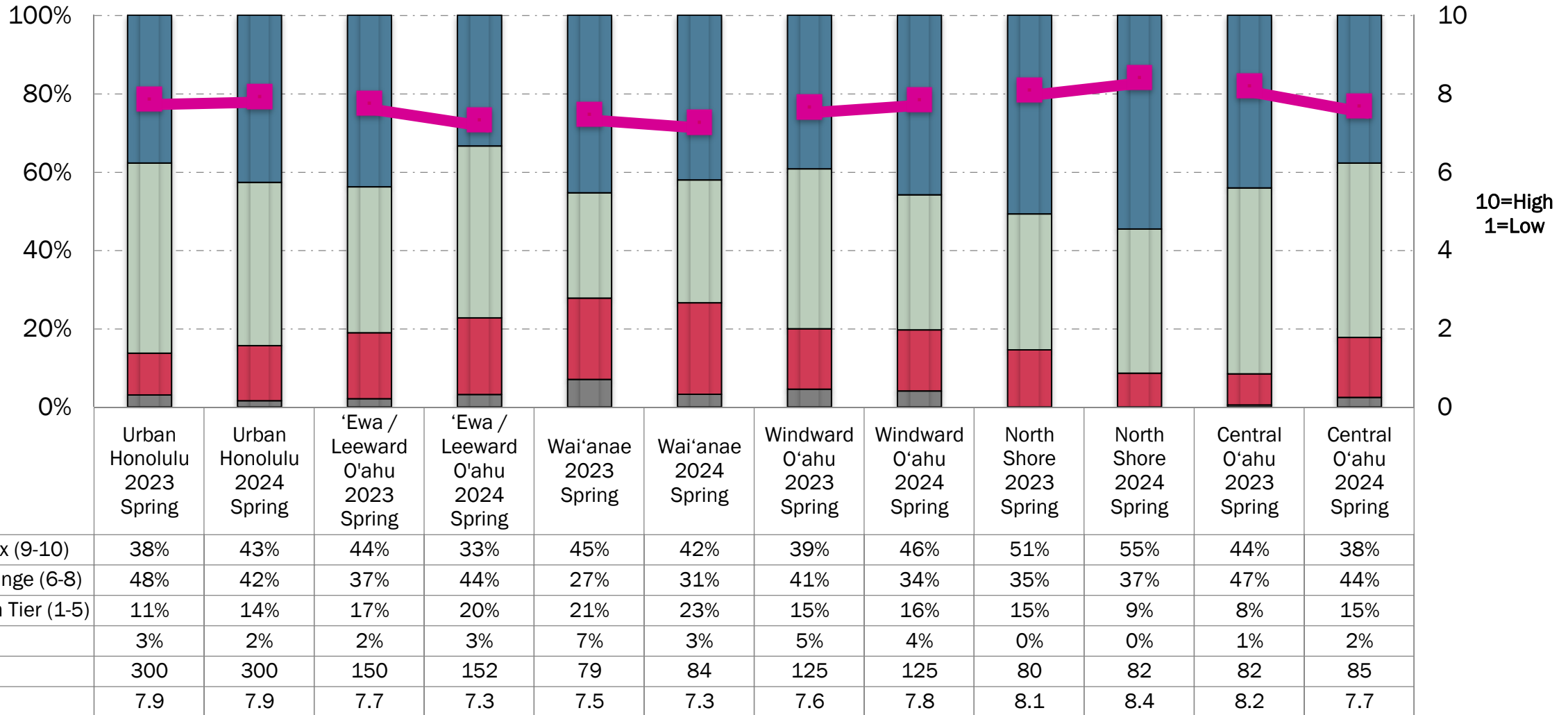
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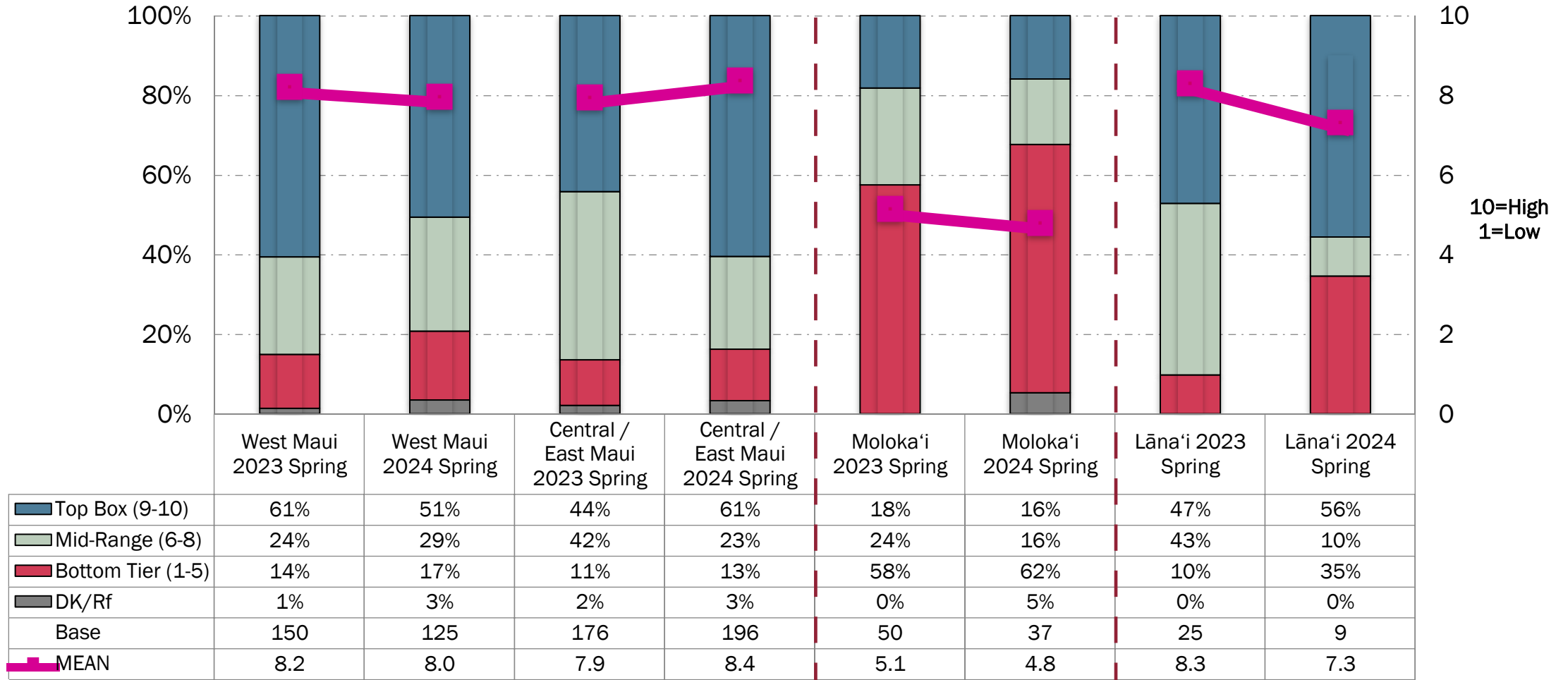
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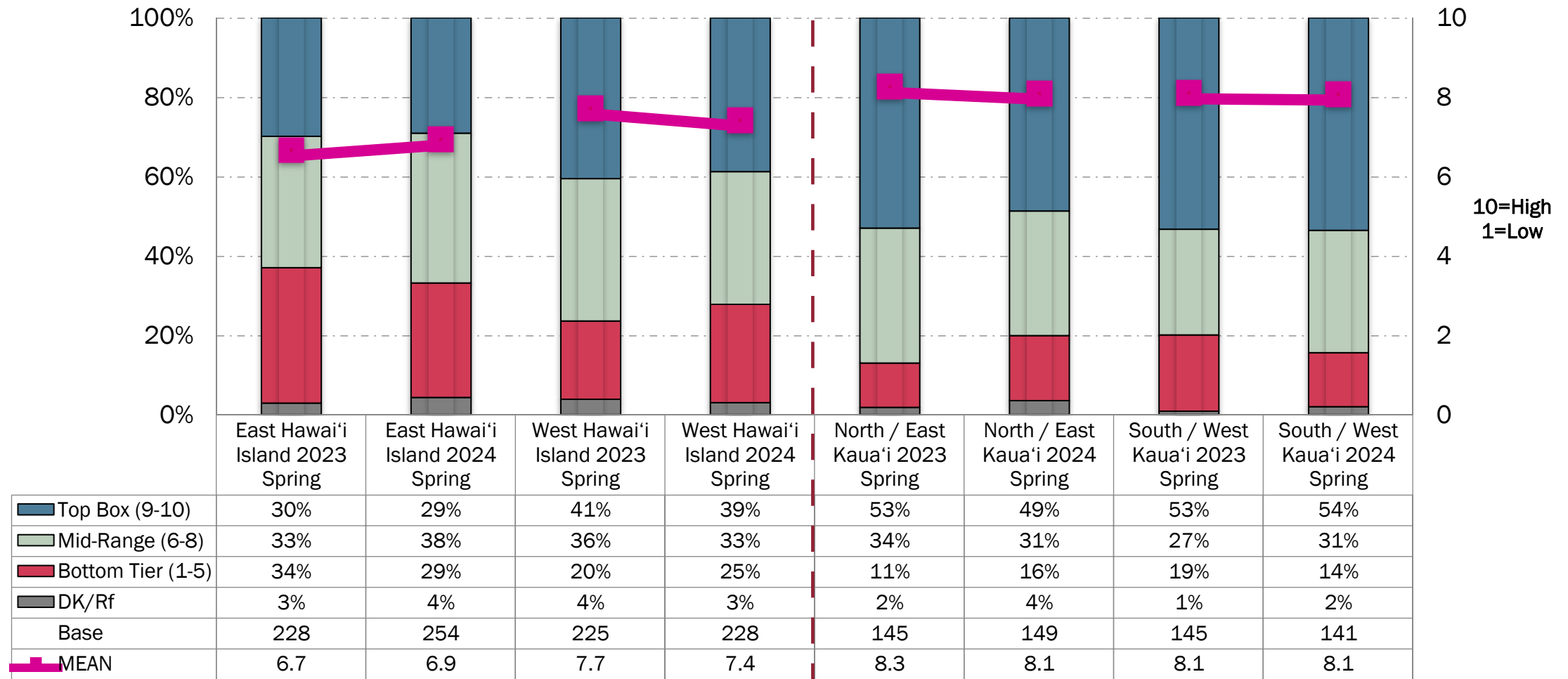
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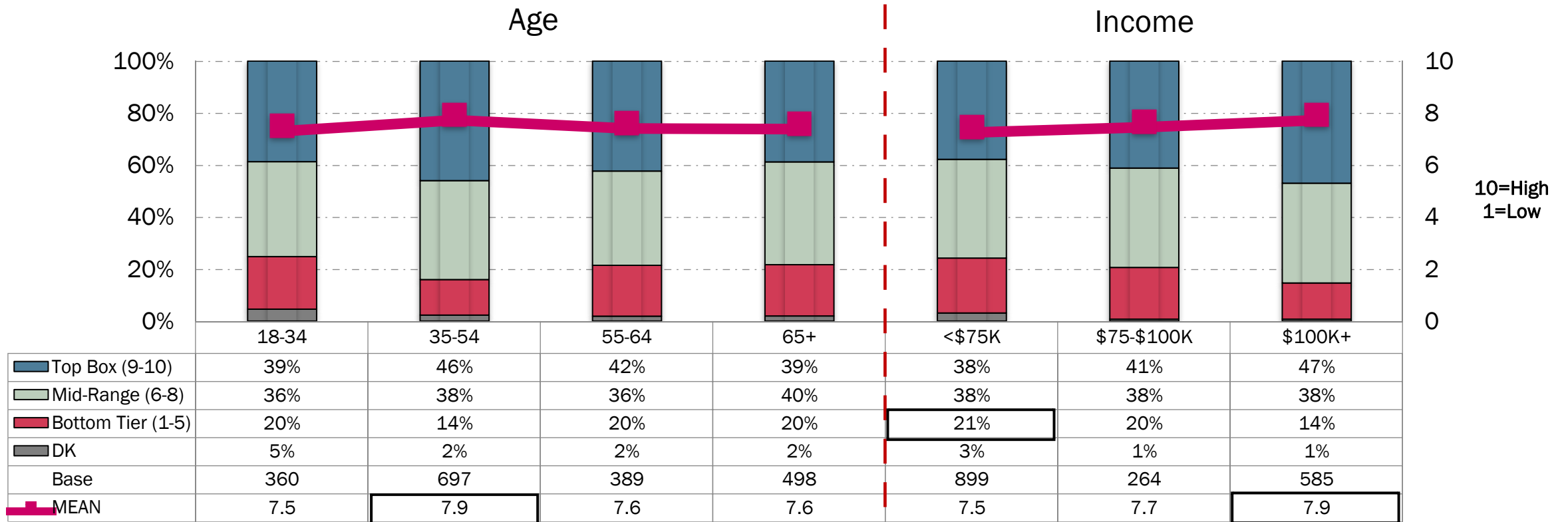
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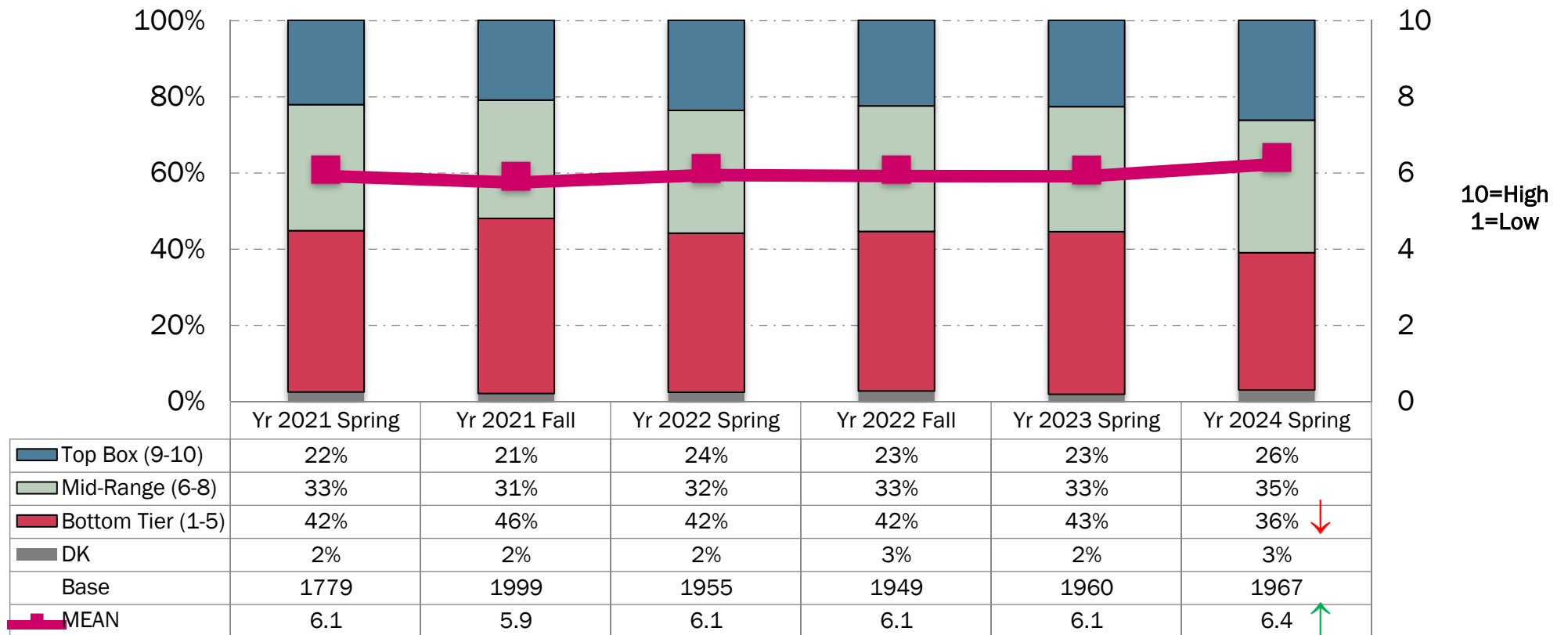
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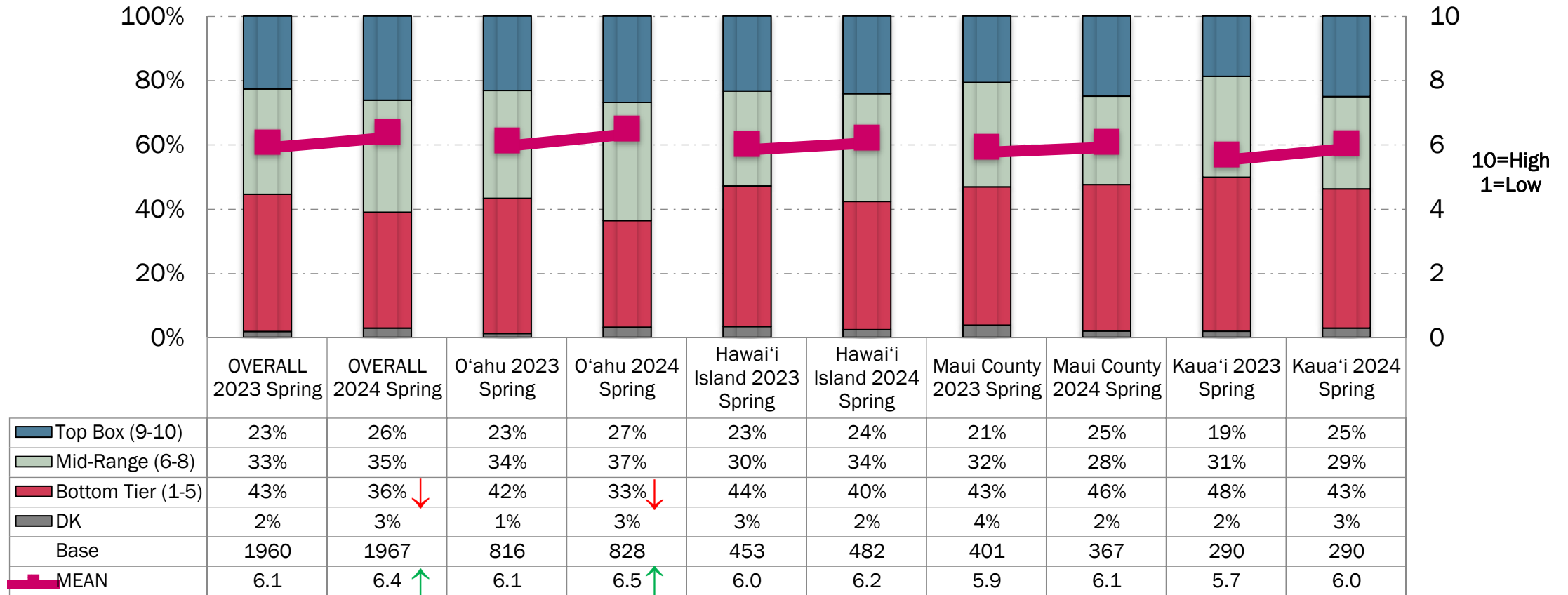
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“Tourism should be actively encouraged on my island” - Overall



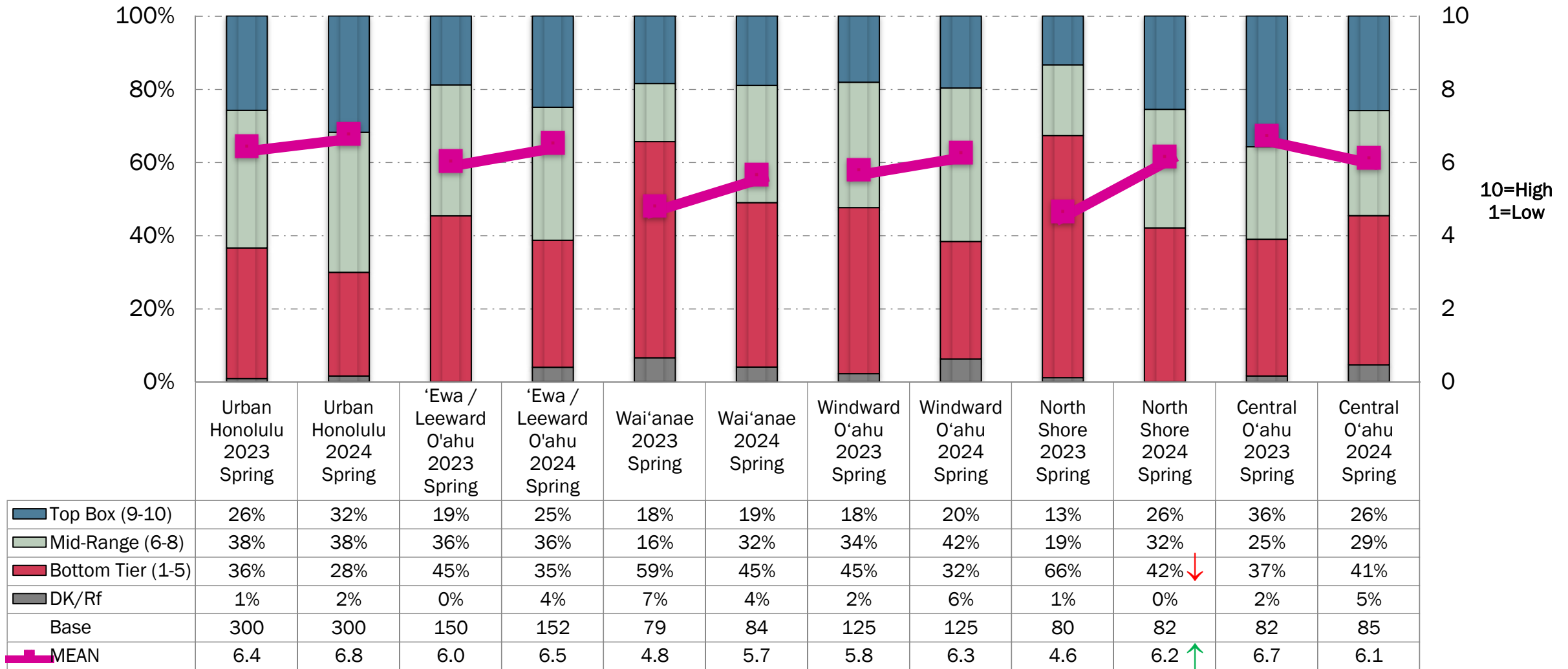
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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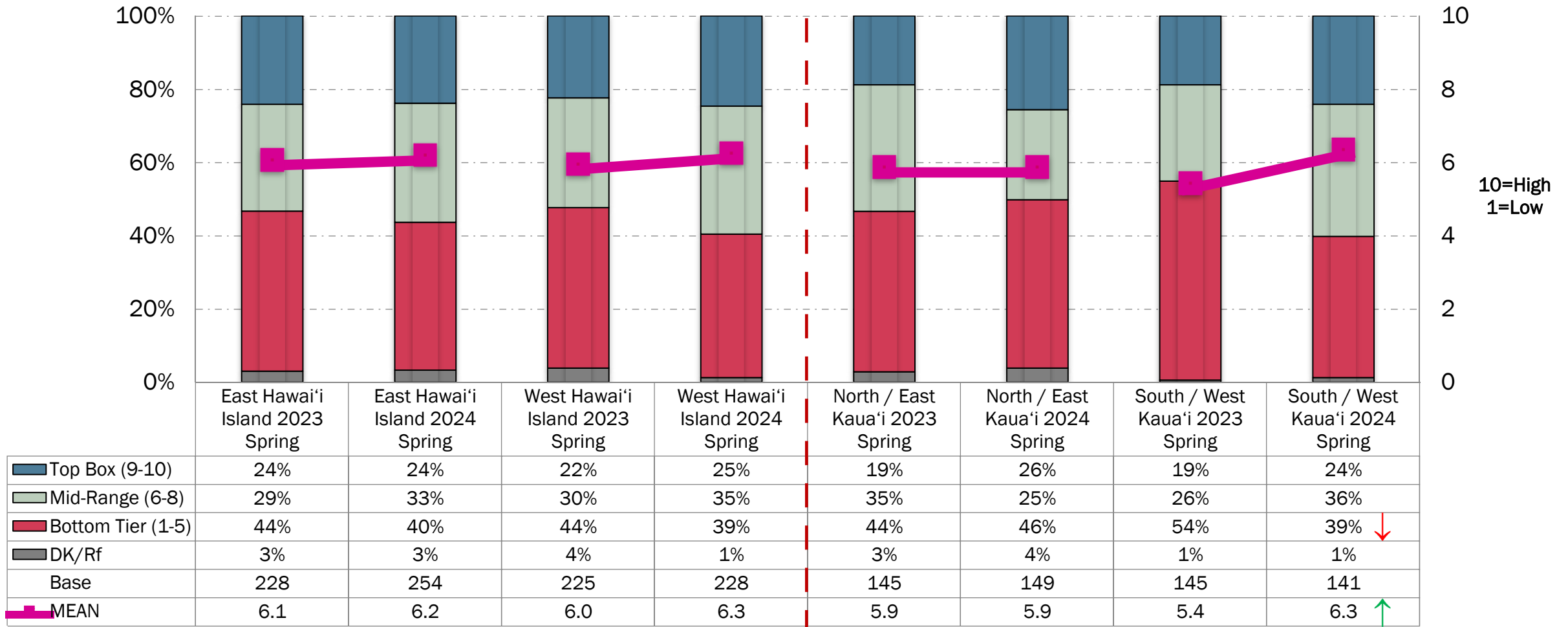
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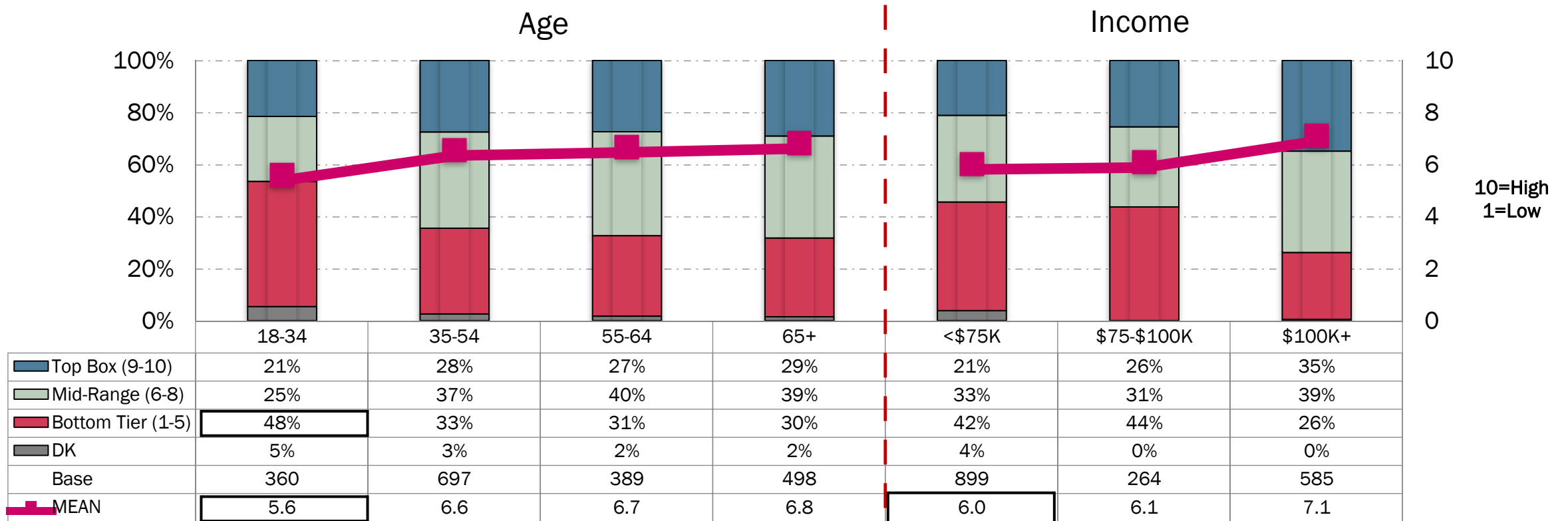
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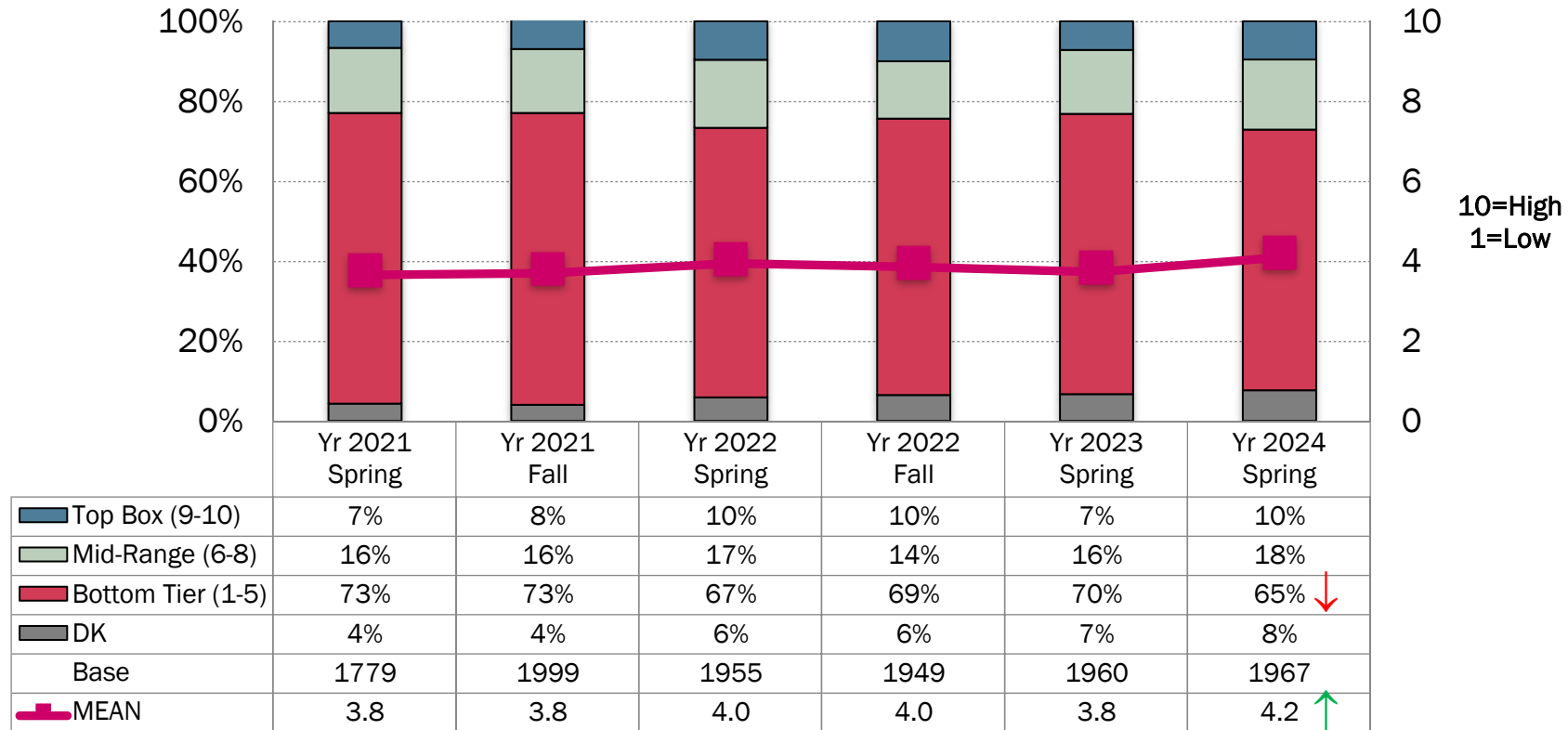
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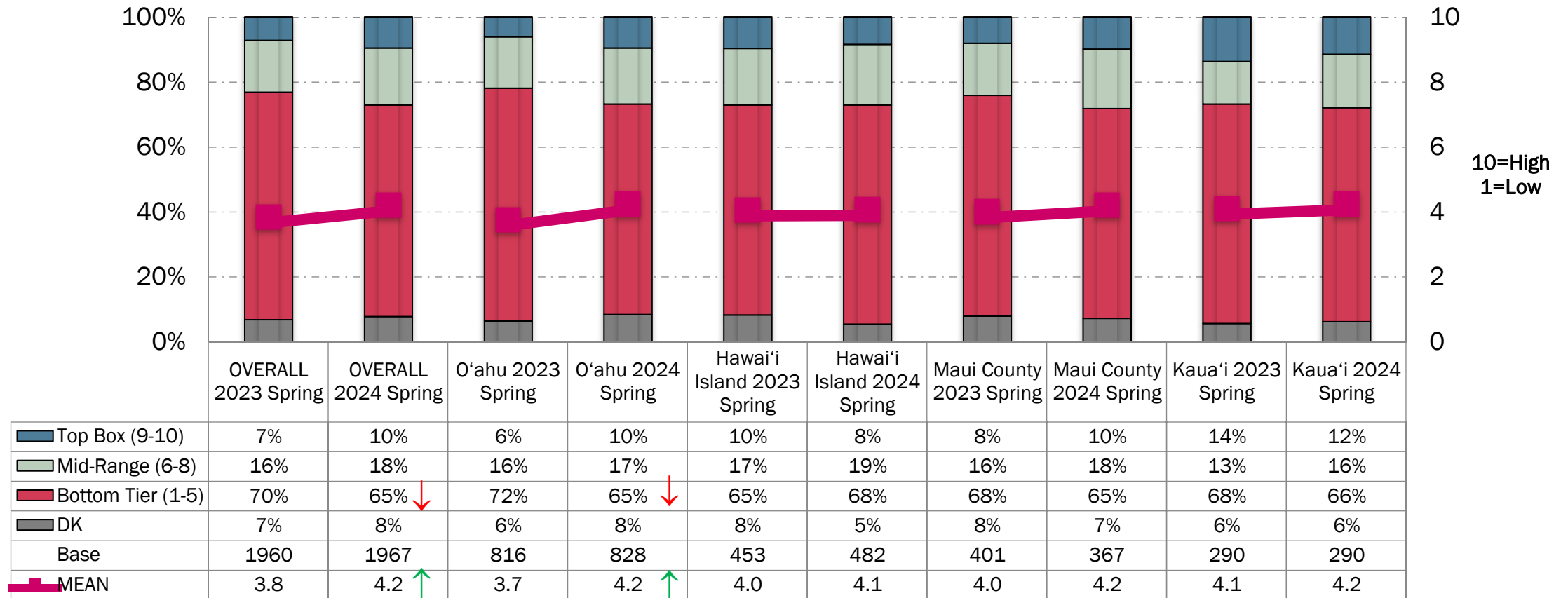
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“I feel like I have a voice in my island’s tourism development decisions” - *Overall*



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

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



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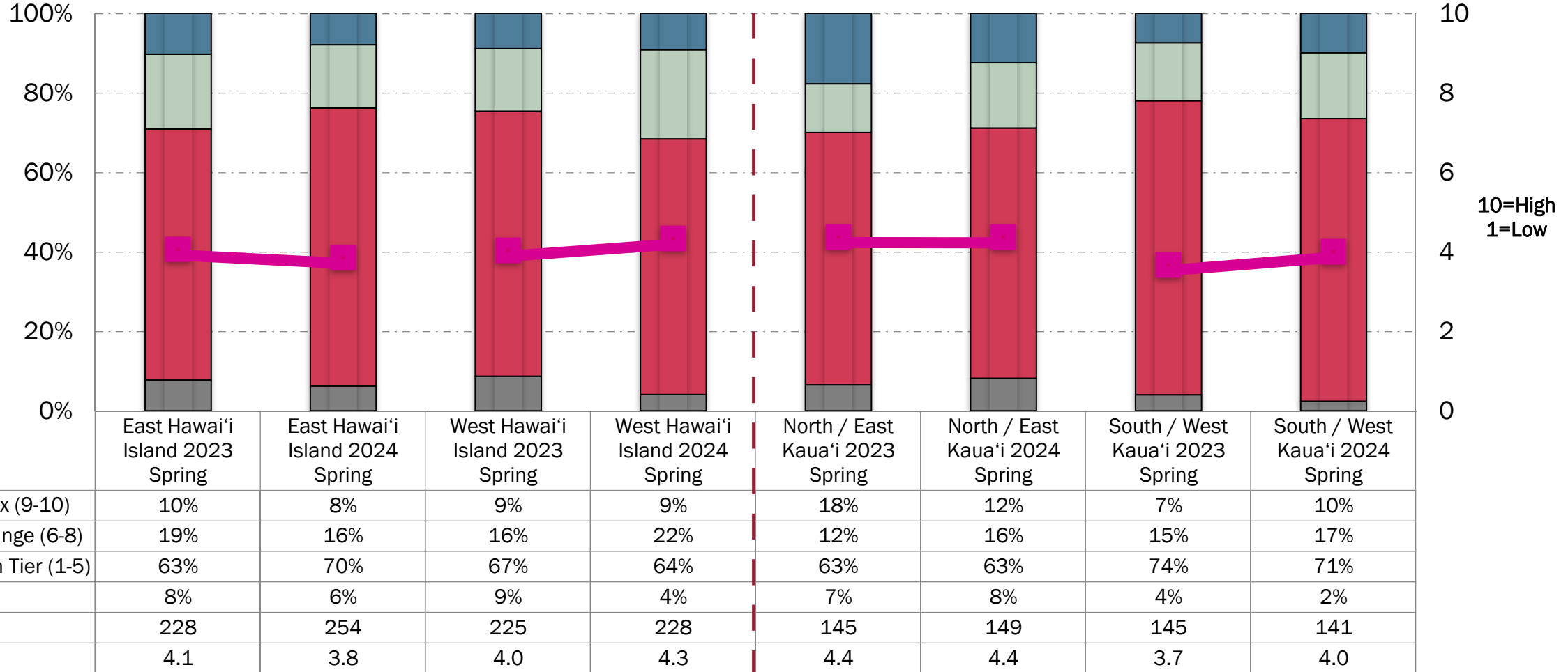
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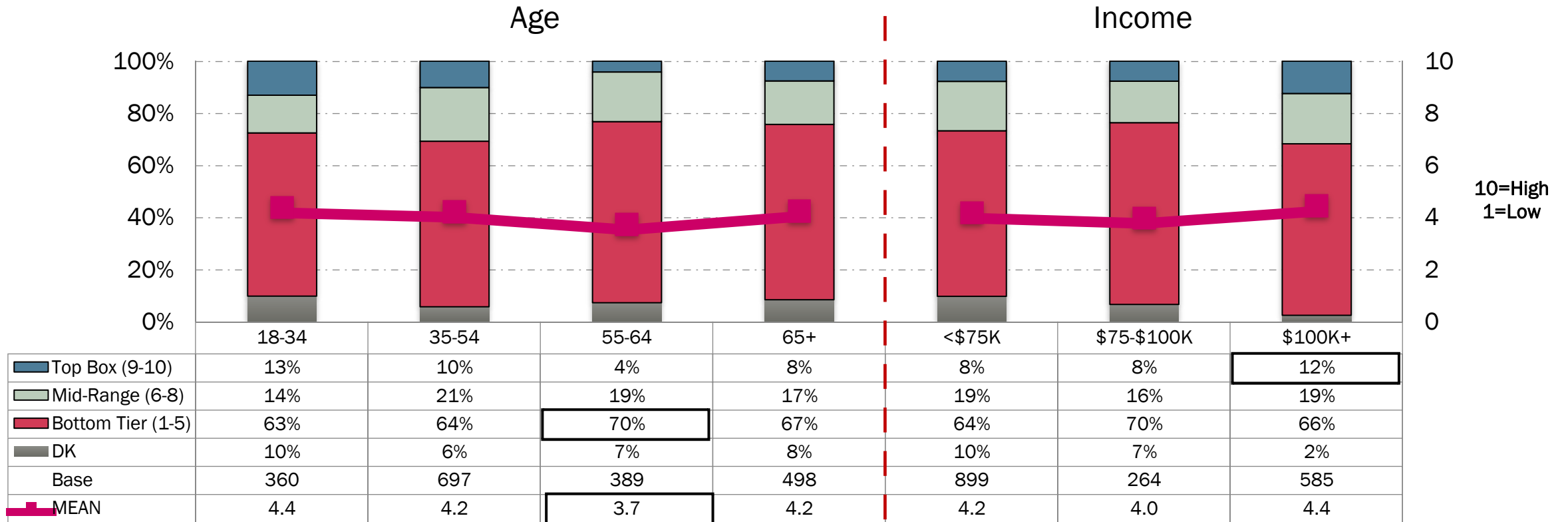
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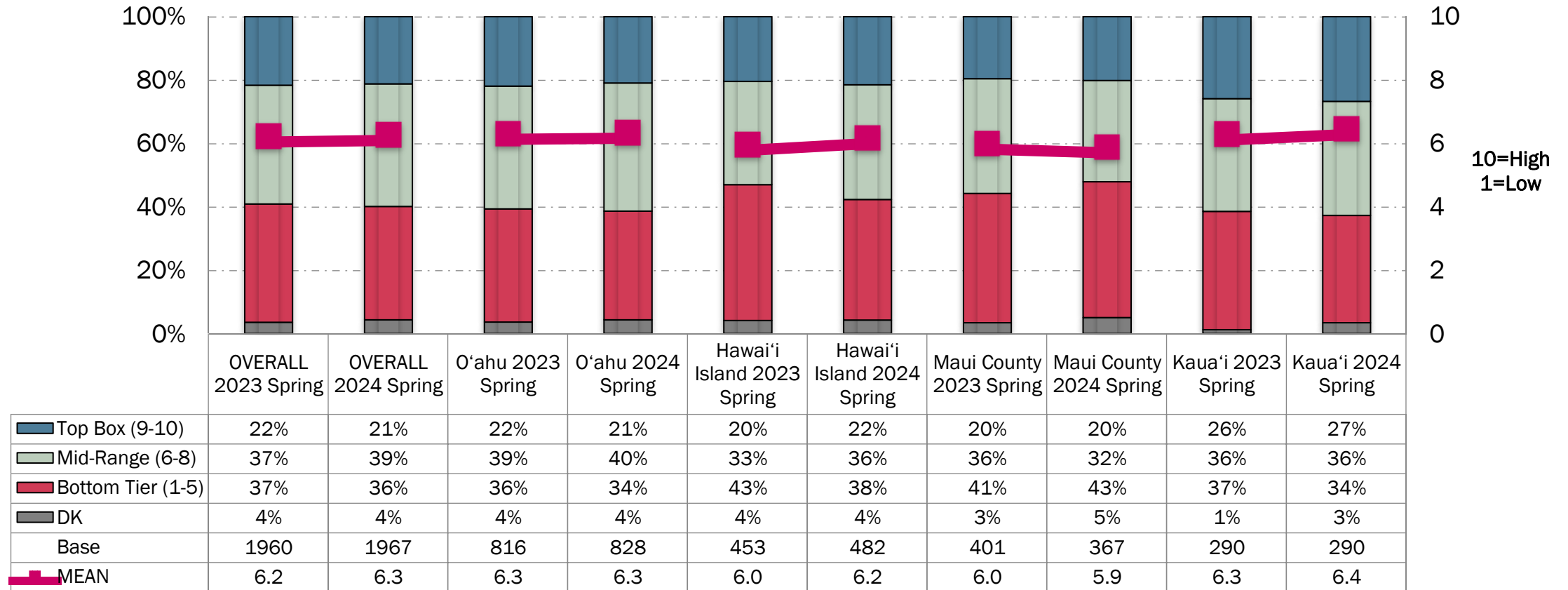
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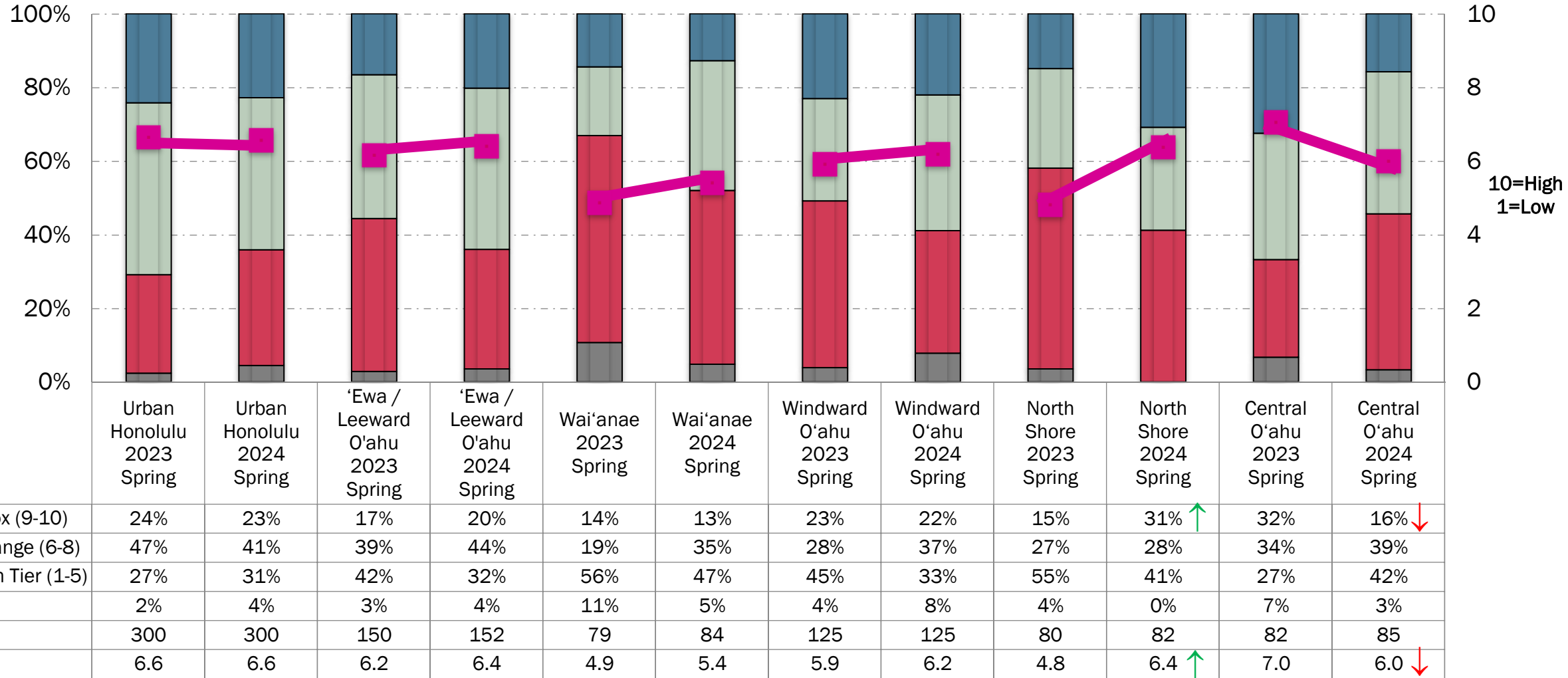
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“Tourism supports other industries important to residents like agriculture and technology” – *By County*



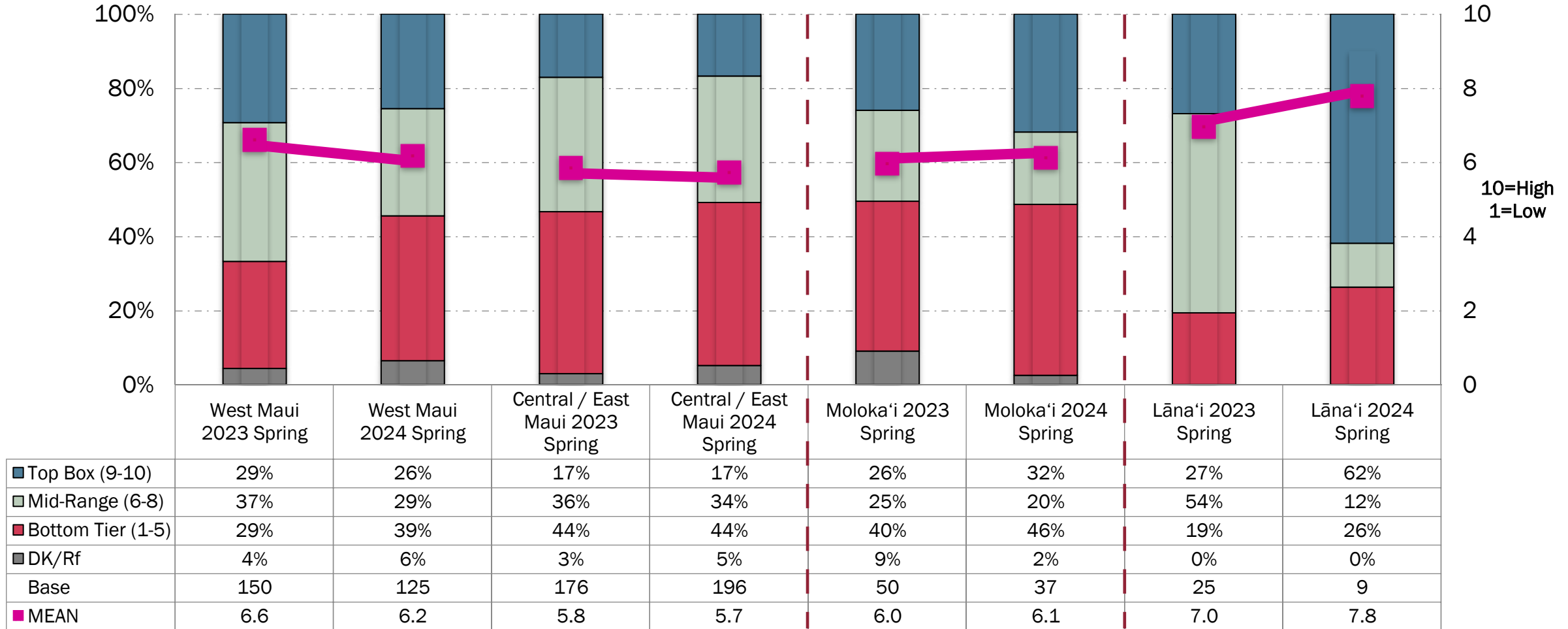
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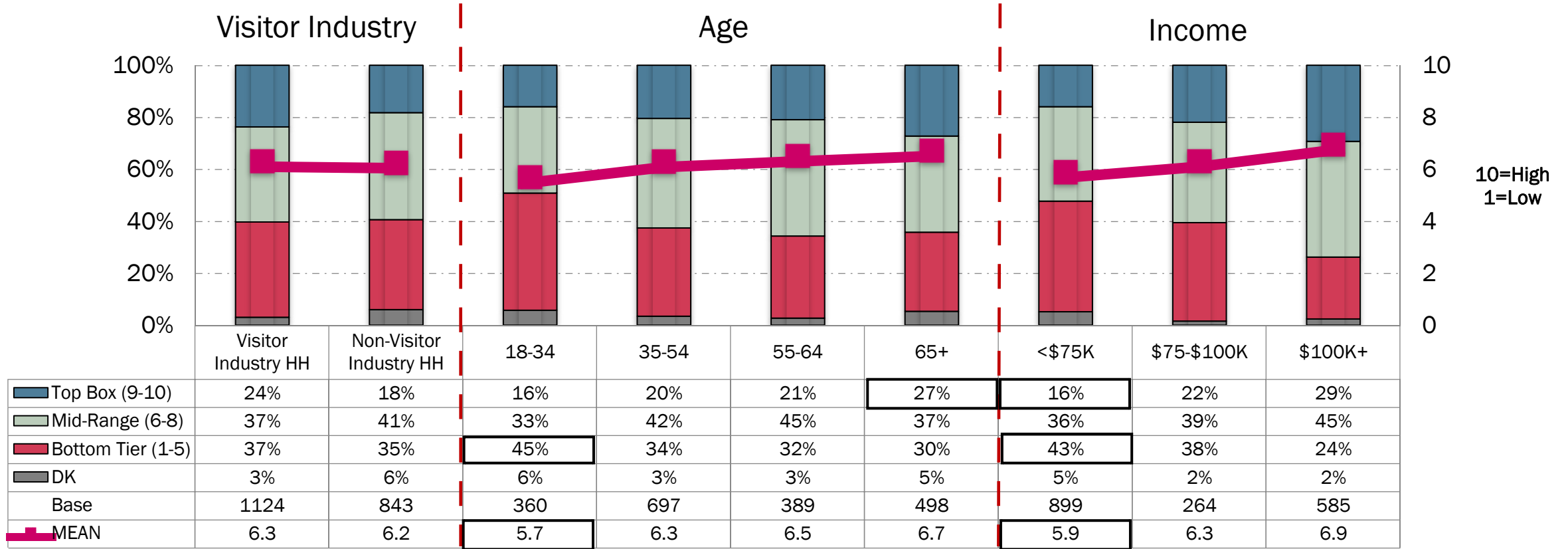


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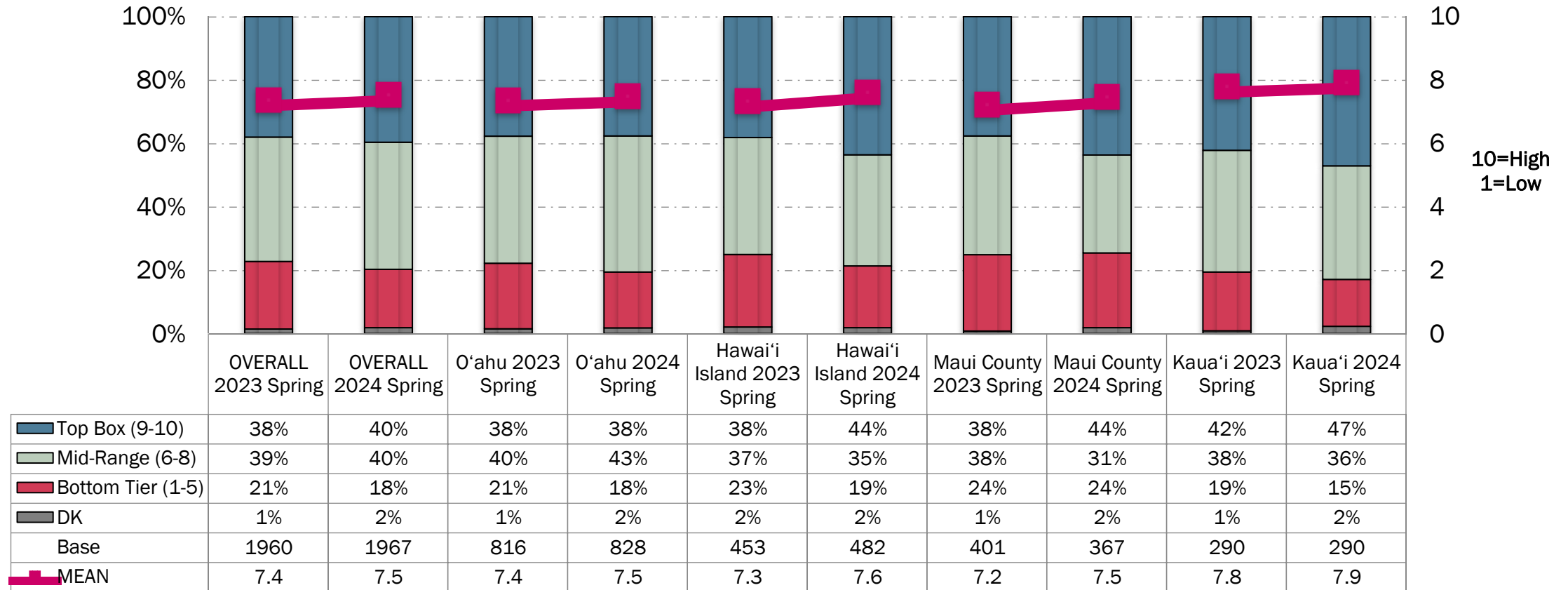
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Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

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



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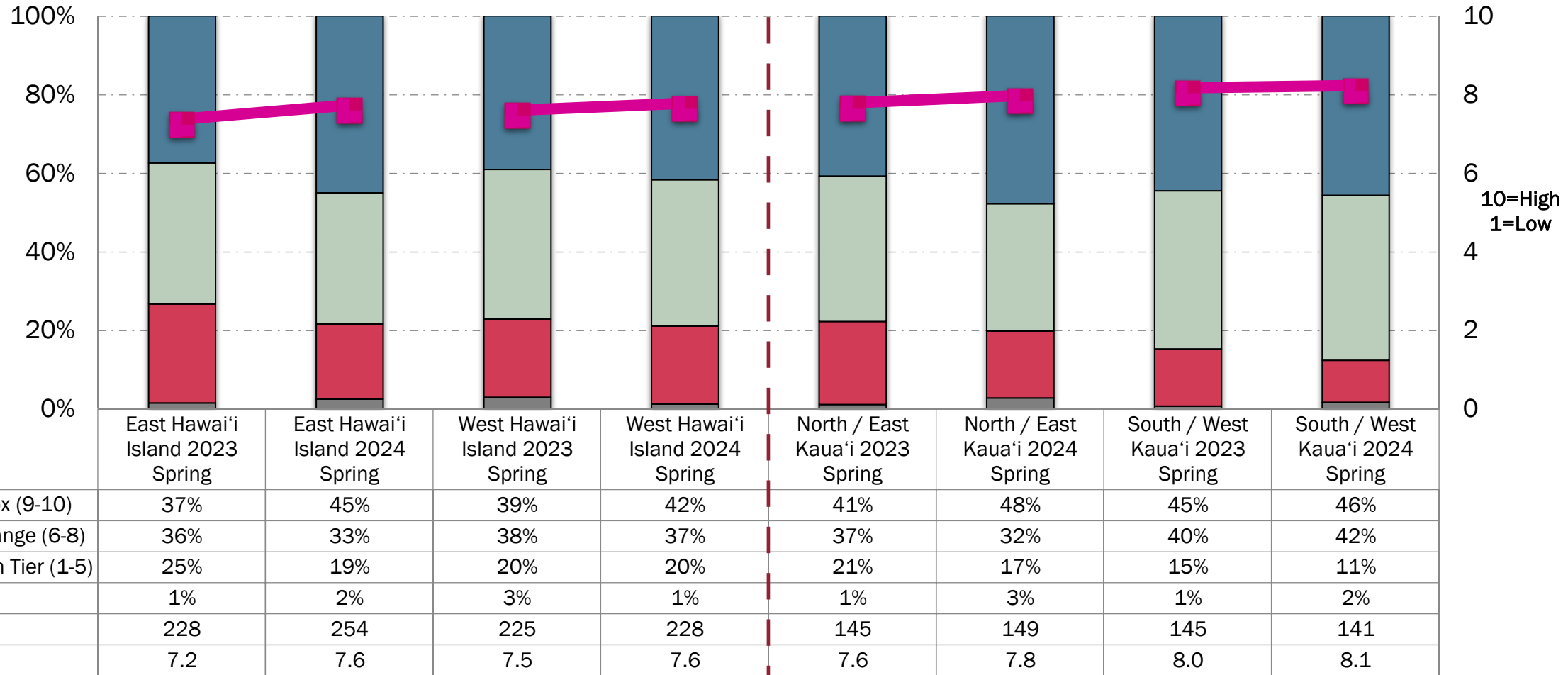
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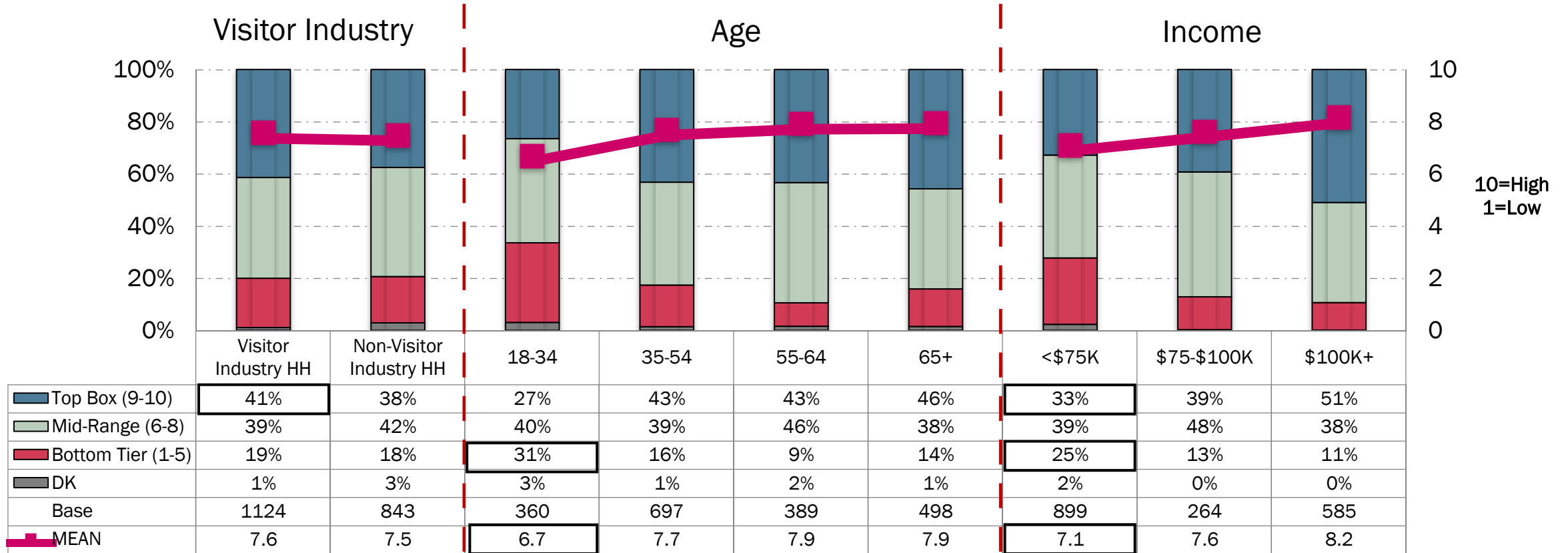
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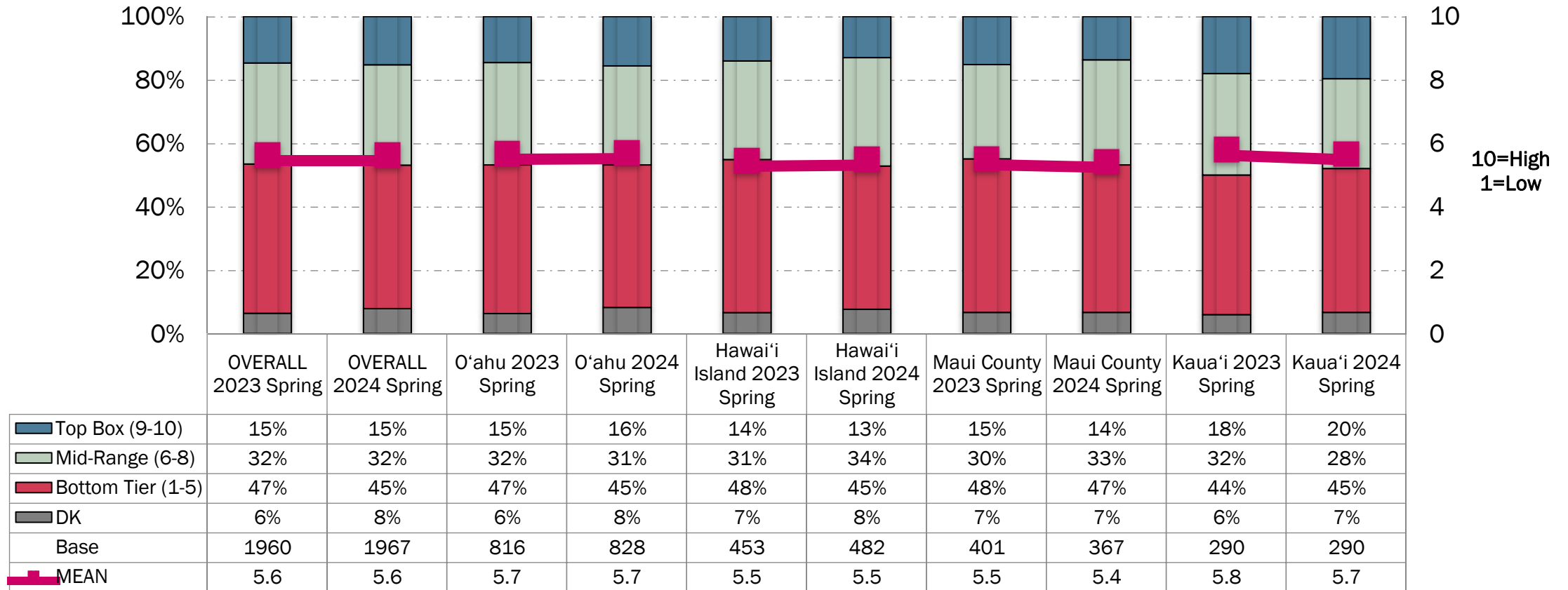
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“Tourism supports our local businesses like retail, dining, etc.” – By Demographics



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



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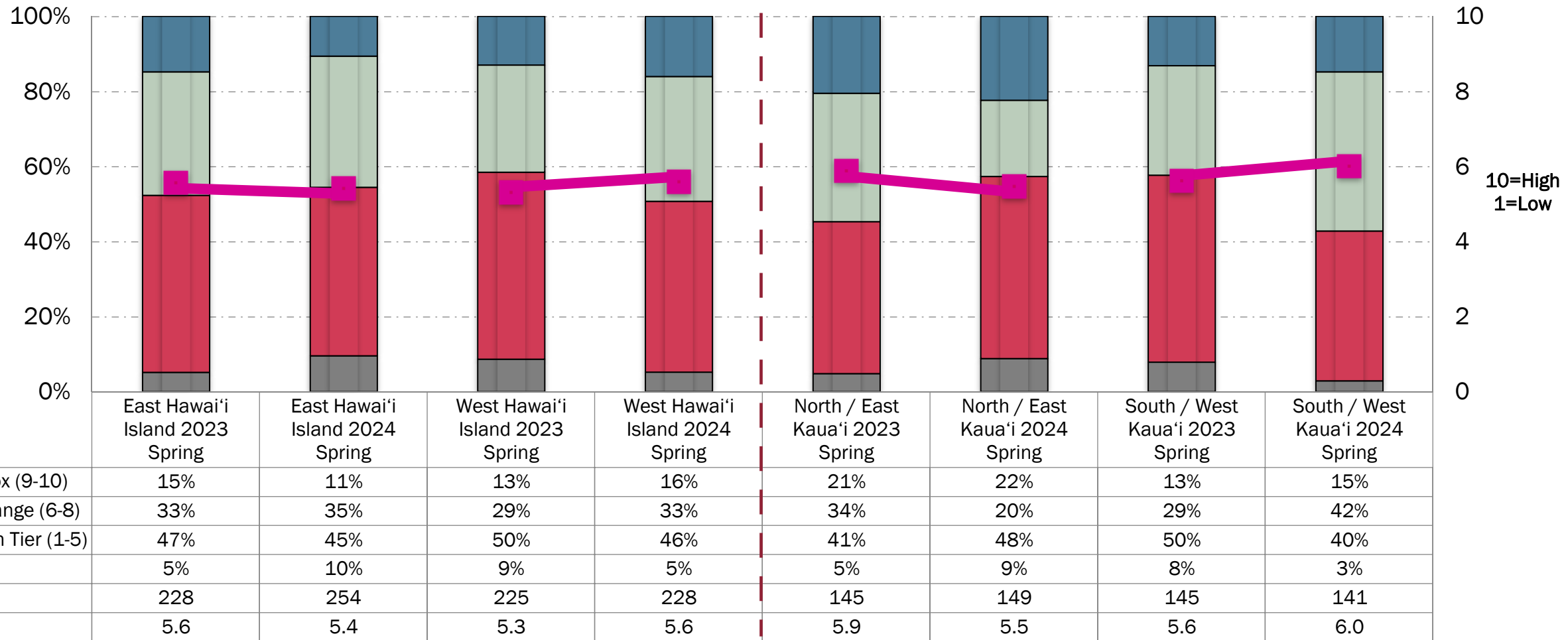
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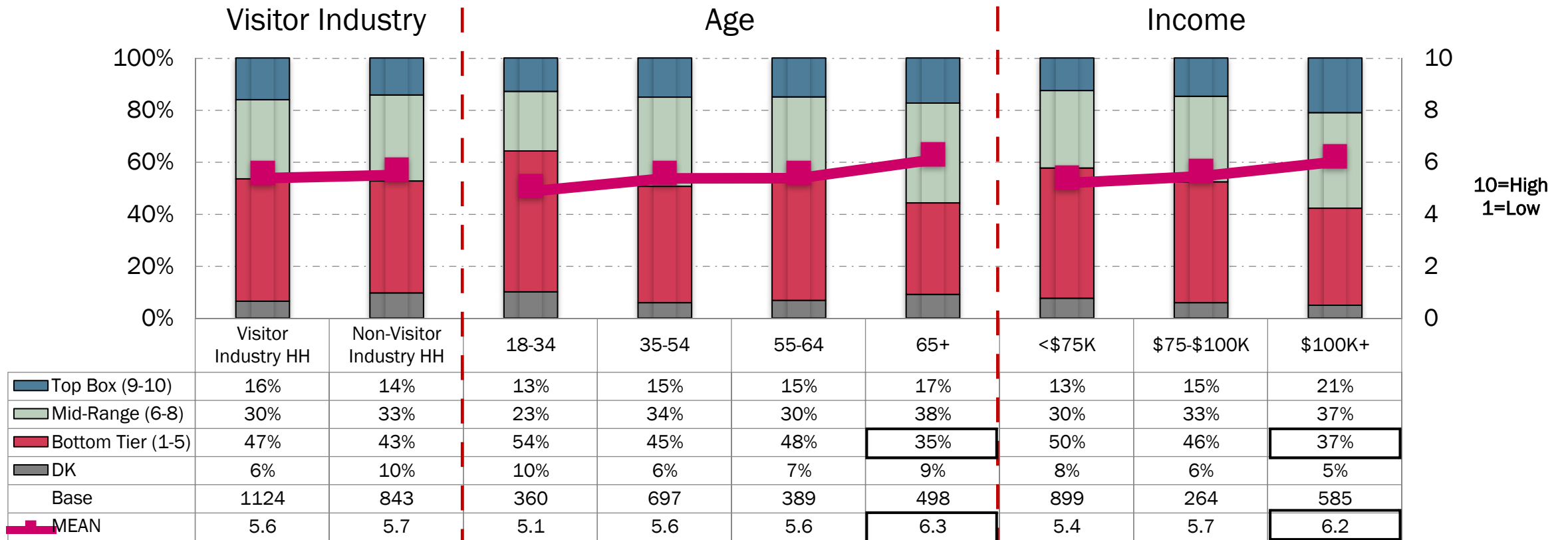
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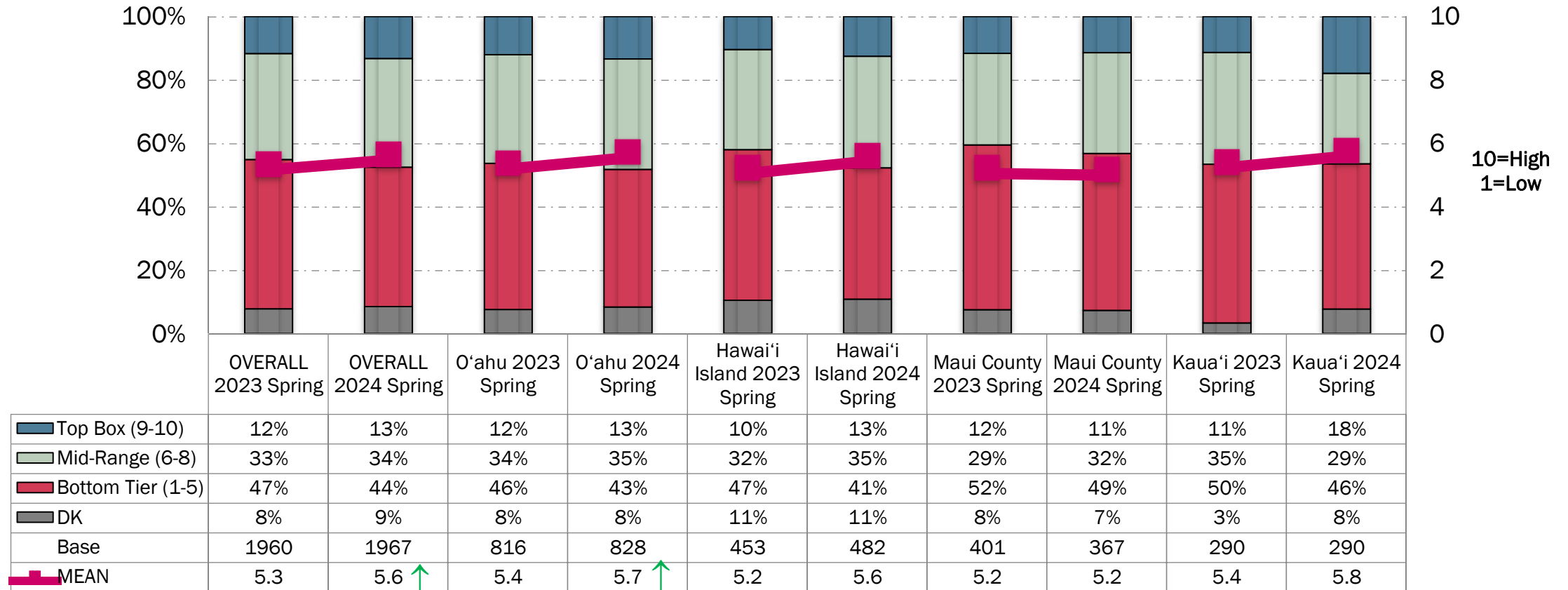
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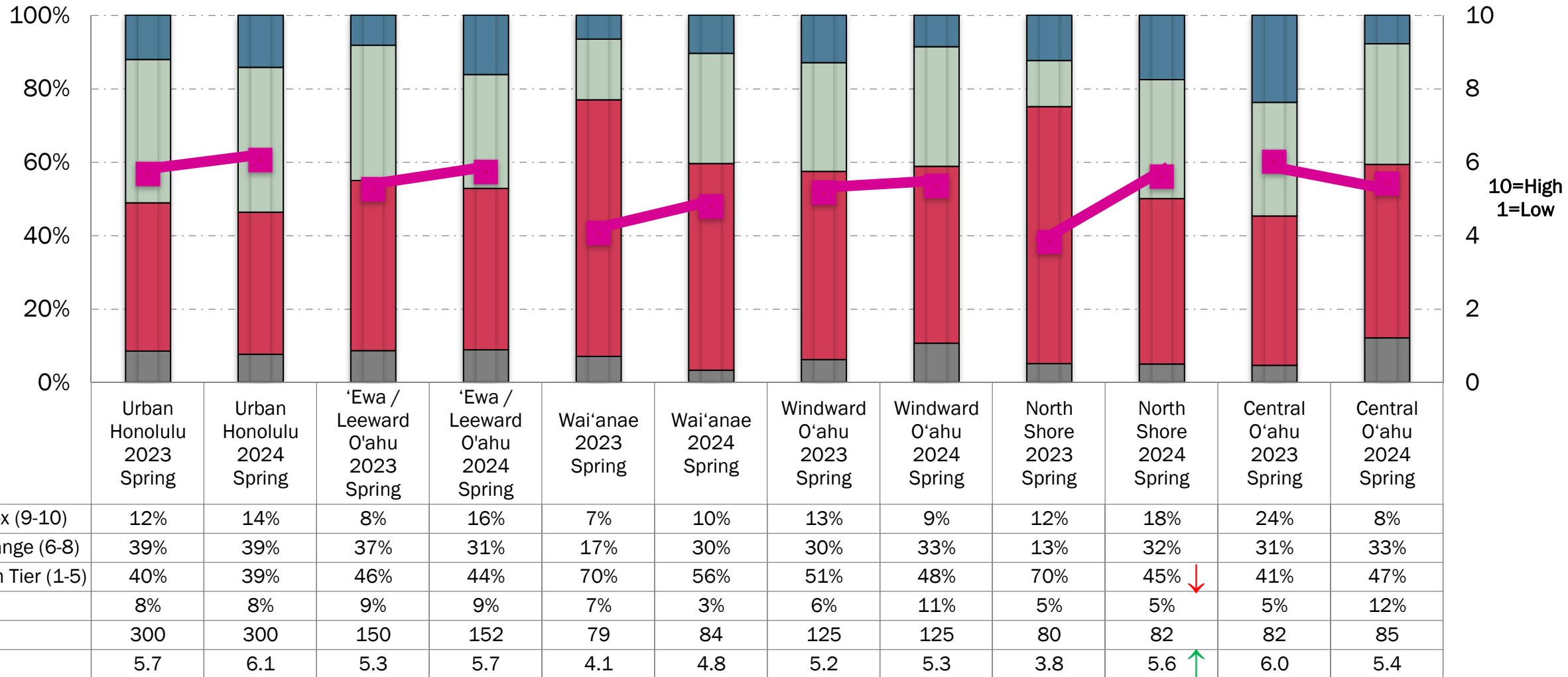
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“I feel like tourism is being better managed on my island” – By County



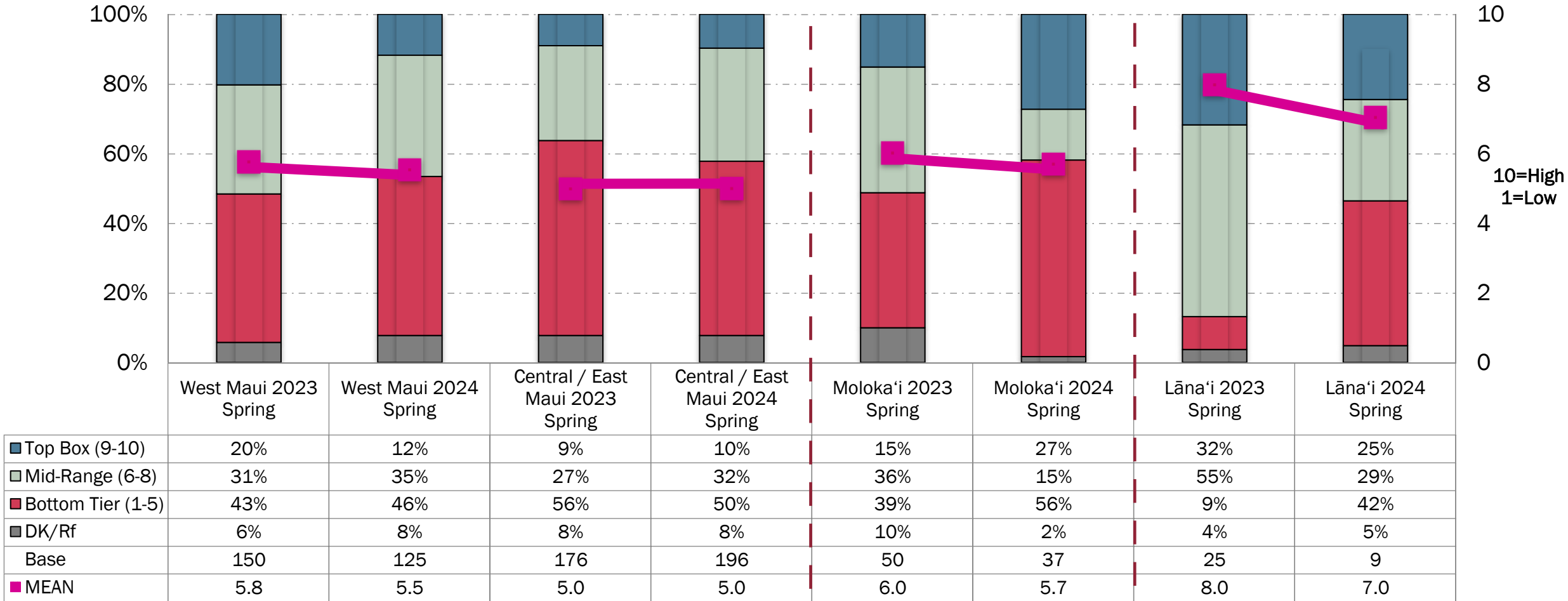
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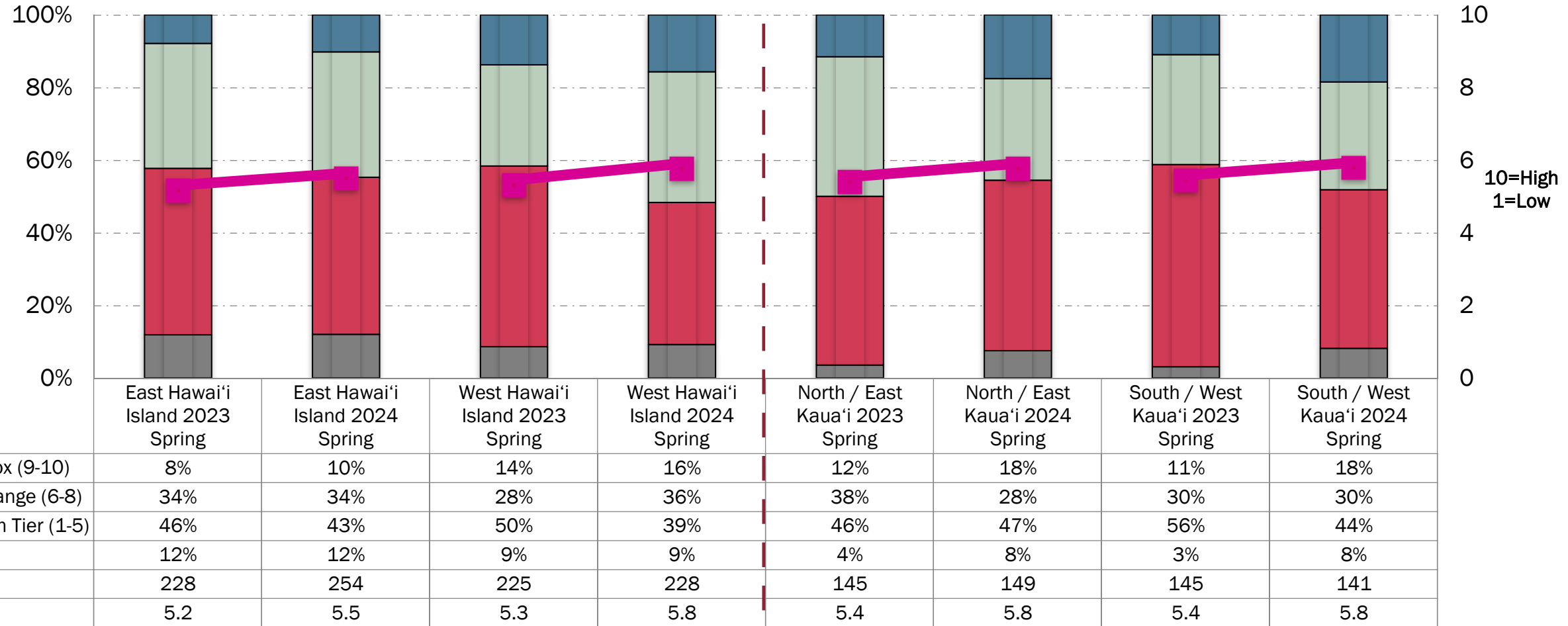
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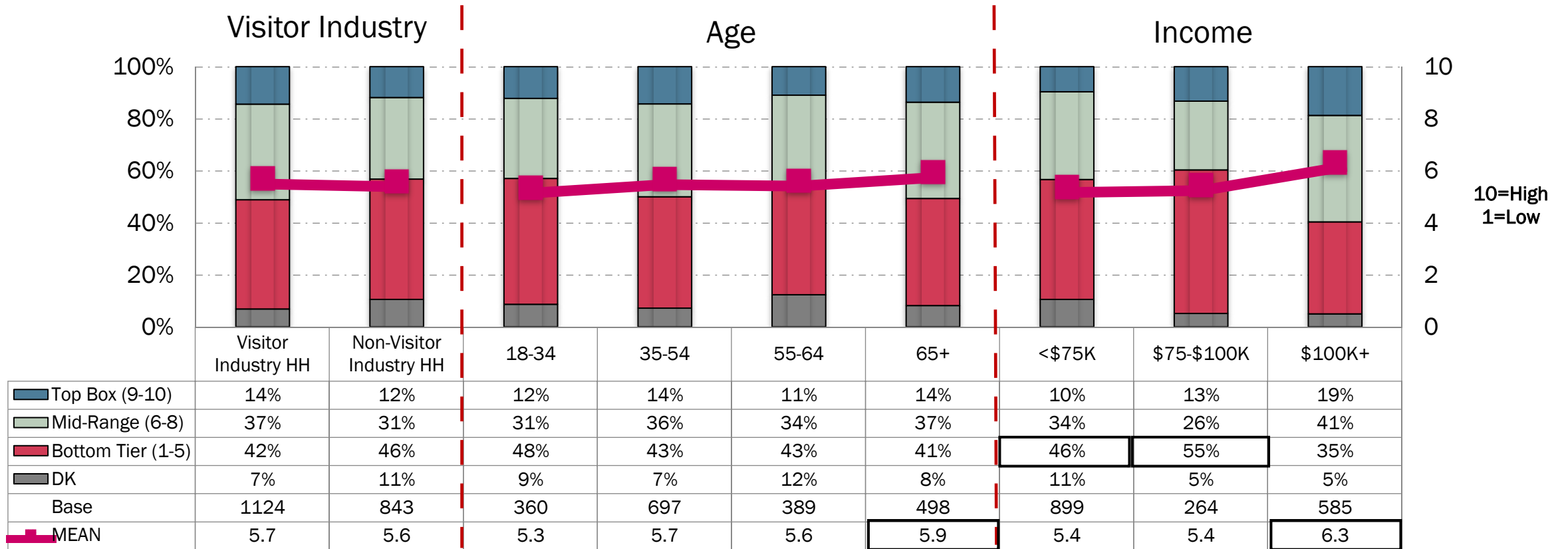
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Appendix A: Island Supplement

Key Recommendations & Takeaways – O‘ahu

- 1** *Reflecting the State as a whole, perception of tourism trends upward:* Overall sentiment among O‘ahu residents improved slightly between 2023 – 2024, notably in being better managed.

Key Resident Sentiment Tracking Statements (O‘ahu)

Mean Score	Spring 2022	Fall 2022	Spring 2023	Spring 2024
<i>Tourism has brought more benefits than problems</i>	6.05	6.11	5.97	6.14
<i>Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	--	6.85	6.55	6.73
<i>Perceived impact of tourism on you and your family</i>	6.04	6.16	6.01	6.34
<i>Tourism is being better managed on my island</i>	5.45	5.50	5.37	5.72 ↑
<i>My island is run for tourists at expense of local people</i>	6.80	6.93	6.90	6.85

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

- 2** *Sentiment is lifted by higher perceptions on the North Shore:* Sentiment towards the industry rose significantly in this community and now exceeds previous levels.

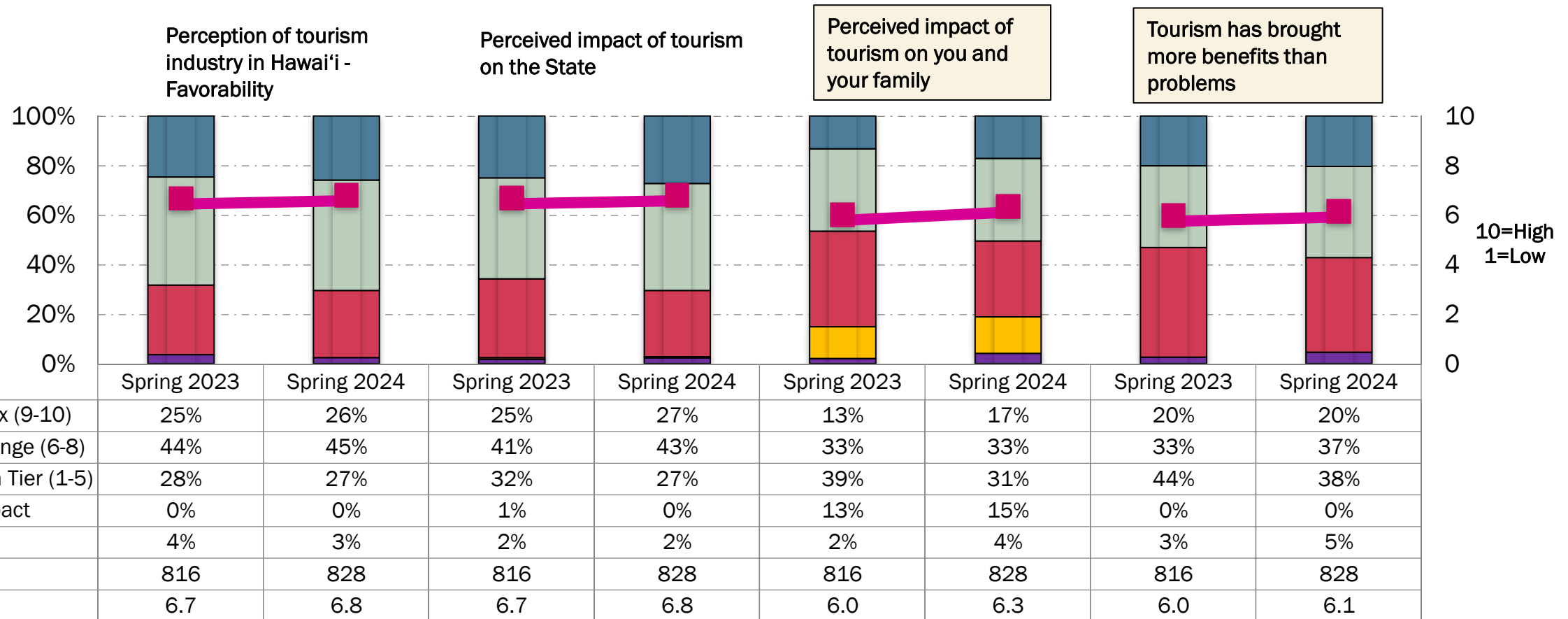
North Shore Mean Score	Fall 2022	Spring 2023	Spring 2024
<i>Tourism has brought more benefits than problems</i>	5.5	4.4 ↓	6.3 ↑
<i>Tourism enhances quality of life</i>	5.0	3.8 ↓	5.8 ↑
<i>I have a voice in tourism development decisions</i>	3.5	2.9 ↓	5.0 ↑

- 3** *Destination Stewardship Awareness:* Among O‘ahu residents, 59 percent are aware of at least one Destination Stewardship initiative being implemented by the Hawai‘i Tourism Authority. Among the specific initiatives, around 42-to-45 percent are aware of work in pre-/post- arrival communications, implementing stewardship plans, and collaborating with community partners to enrich the lives of visitors/residents.

Percent Aware	Honolulu	‘Ewa Leeward	Wai‘anae	Windward	North Shore	Central
<i>Implement a pre- and post-arrival visitor communications program</i>	48%	41%	49%	42%	51%	40%
<i>Identify popular visitor sites and implement stewardship</i>	47%	40%	38%	39%	50%	37%
<i>Work with community partners to develop, market and support more collaborative, curated experiences</i>	46%	42%	34%	35%	50%	37%

Although O‘ahu residents are generally aware of these initiatives, awareness levels varied differently across communities. North Shore residents have the highest awareness on the island.

O‘ahu – Key High Level Resident Sentiment Indicators

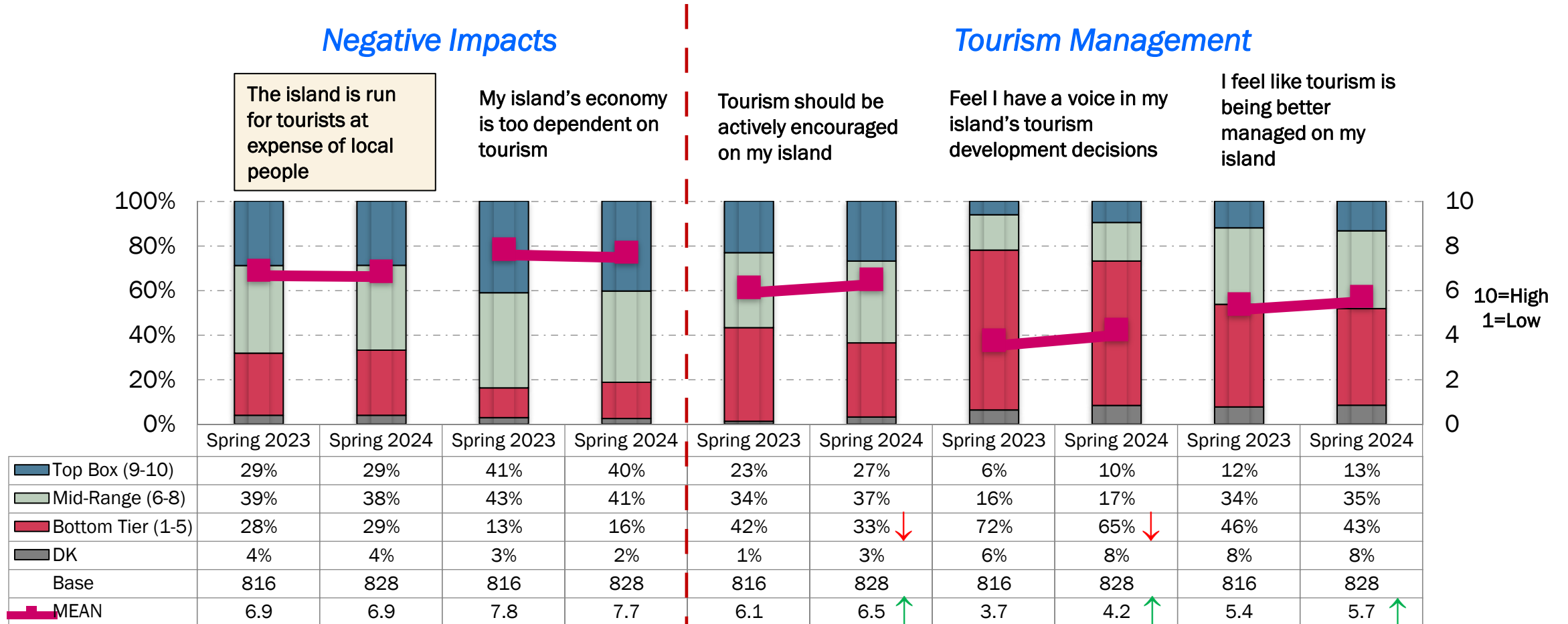


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai‘i.

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

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

O‘ahu – Key Island-Specific Resident Sentiment Indicators



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.

Key Recommendations & Takeaways – Maui County

1 After peaking in 2022, sentiment among Maui County residents has stabilized:

In Spring 2024, perceptions of the tourism industry trended lower compared to the surge observed in the previous year. While many residents still believe that tourism brings benefits, negative perceptions are rising.

Mean Score	Spring 2022	Fall 2022	Spring 2023	Spring 2024
Tourism has brought more benefits than problems	5.34	6.11 ↑	5.92	5.72
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	--	6.67	6.26	6.28
Perceived impact of tourism on you and your family	5.72	6.40 ↑	6.50	6.17
My island is run for tourists at expense of local people	8.01	7.11 ↓	7.19	7.62
My Island's economy is too dependent on tourism	8.30	7.68 ↓	7.84	8.09

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

In comparing the tax revenues brought in versus the issues associated with the industry, Maui County residents were less optimistic (i.e., than the other counties) that the industry is worth the revenues generated.

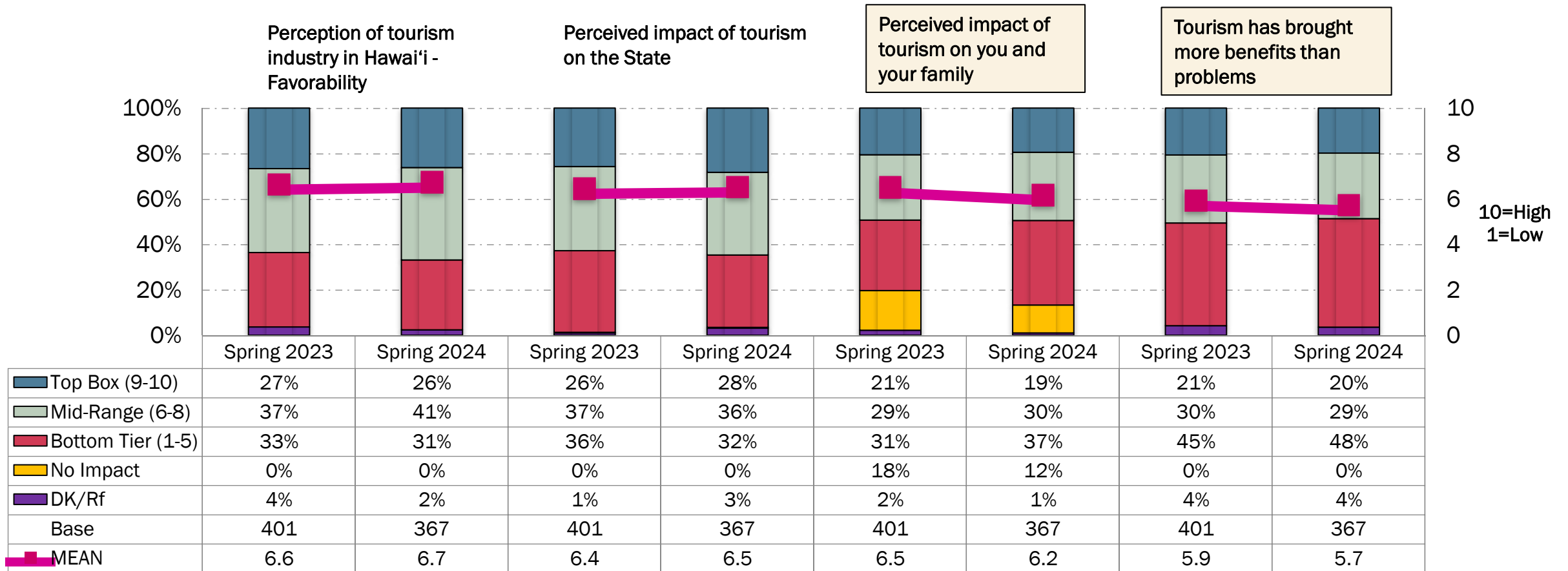
Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.7	6.7	6.3	6.7

2 Community trends: Although favorability towards tourism remains strong in West Maui, weaker perceptions in Central/Eastern Maui and Lāna'i balanced out the overall scores, resulting in a level outcome. Moreover, Moloka'i and Lāna'i report lower sentiment compared to other areas. These findings further highlight the uneven distribution of both the problems and benefits associated with tourism.

3 Destination Stewardship Awareness: More than half (58%) of Maui County residents are aware of at least one Hawai'i Tourism Authority Destination Stewardship initiative being undertaken within the county. Awareness levels on each island ranged from 48 percent of Moloka'i residents, to 58 percent on Maui and 64 percent on Lāna'i. However, in this particular case, high levels of awareness of Destination Stewardship initiatives on Moloka'i and Lāna'i did not correlate with stronger perceptions of tourism on these islands, where lower sentiment has been observed.

Percent Aware	Maui County	Island of Maui	Moloka'i	Lāna'i
Awareness of at least one Destination Stewardship initiative being implemented by the Hawai'i Tourism Authority	58%	58%	48%	64%

Maui County – Key High Level Resident Sentiment Indicators

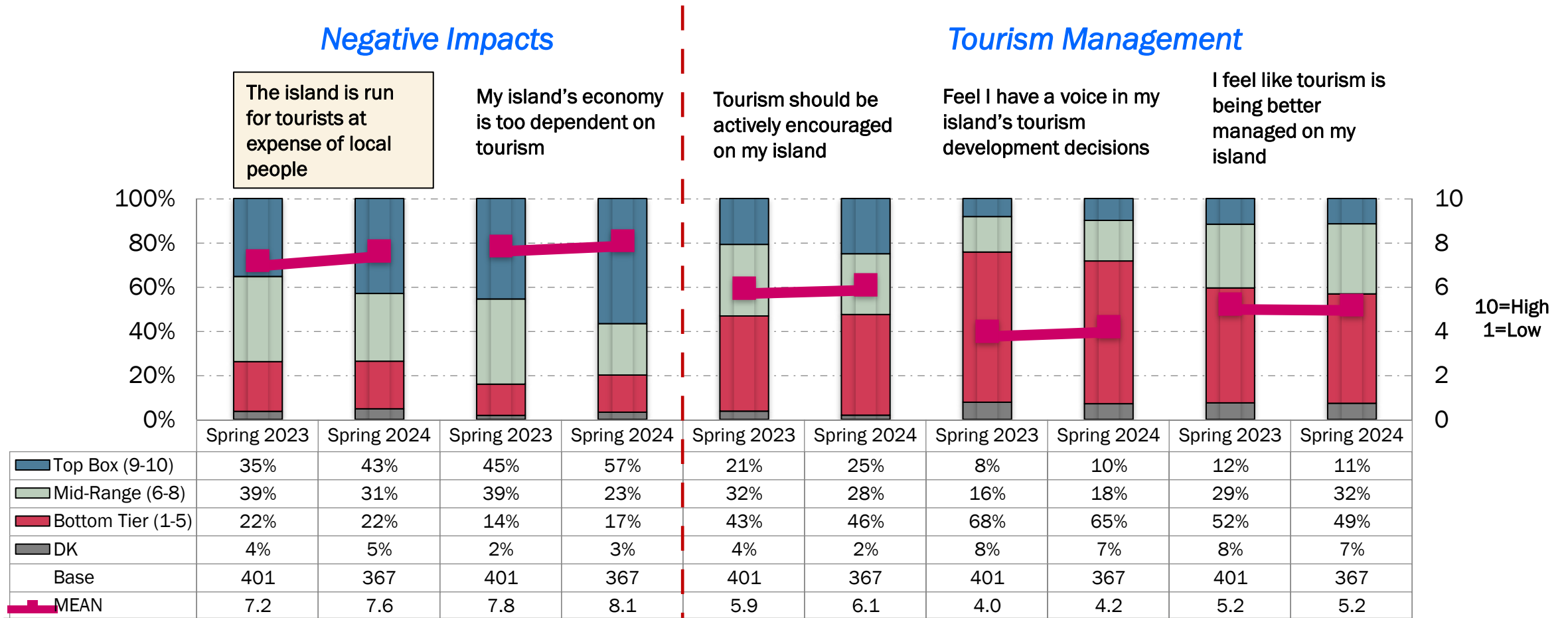


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

Maui County – Key Island-Specific Resident Sentiment Indicators



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.

Key Recommendations & Takeaways – Hawai‘i Island

1 Resident sentiment trends are mixed in 2024: While key indicators of sentiment such as tourism providing more benefits than problems and positively impacting you or your family have improved, more also believe that the industry is being run at the expense of locals.

Key Resident Sentiment Tracking Statements (Hawai‘i Island)

Mean Score	Spring 2022	Fall 2022	Spring 2023	Spring 2024
Tourism has brought more benefits than problems	5.99	5.84	5.67	5.94
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	--	6.72	6.76	6.67
Perceived impact of tourism on you and your family	6.18	6.34	6.13	6.30
<i>My island is run for tourists at expense of local people</i>	6.51	6.62	6.40	6.54

Compared to other counties, however, Hawai‘i Island residents are less likely to perceive the negative effects compared to other counties (i.e., *My island is run for tourists, my island is too dependent on tourism*).

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>My island is run for tourists at expense of local people</i>	6.9	6.5	7.6	7.5
<i>My island’s economy is too dependent on tourism</i>	7.7	7.1	8.1	8.1

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

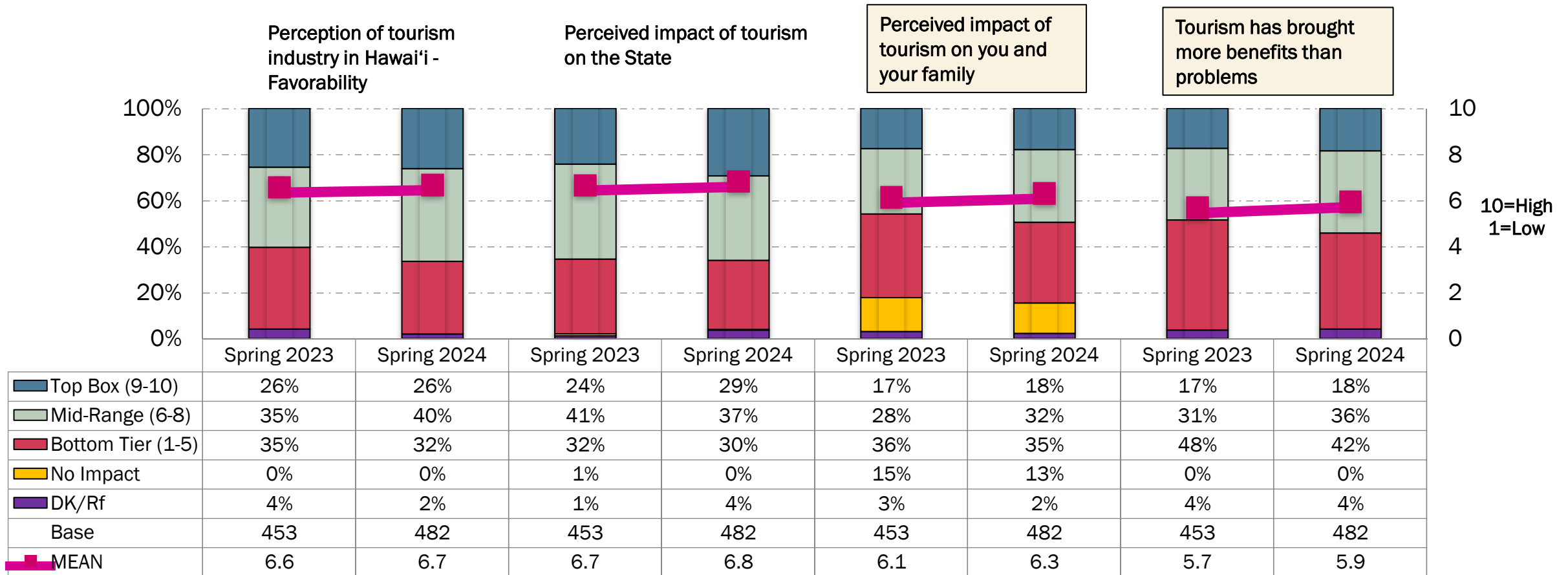
2 Community Differences: Residents of West Hawai‘i Island rebounded in their perceptions of the industry – improving from lows reported in 2023. Residents of this community expressed positive support for tourism in bringing more benefits than problems, positively impacting their families, providing jobs, and generating tax revenues that benefit public services.

West Hawai‘i Mean Score	Spring 2023	Spring 2024
Tourism has brought more benefits than problems	5.5	6.1
Perceived impact of tourism on you and your family	6.1	6.4
Job opportunities for advancement	6.3	6.8 ↑
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.3	6.7

3 Destination Stewardship Awareness: More than half (57%) of Hawai‘i Island residents are aware of at least one Destination Stewardship initiative being undertaken on the island, with awareness in the West (59%) slightly outpacing the East (55%). Awareness of specific initiatives varies between the communities.

Percent Aware	West Hawai‘i	East Hawai‘i
Protect and preserve culturally significant places and hotspots	51%	43%
Develop resources and educational programs to perpetuate authentic Hawaiian culture and ‘Ōlelo Hawai‘i	47%	43%
Implement a comprehensive communications and education plan that facilitates positive community-visitor relations and pono practices, including the Pono Pledge	43%	35%

Hawai'i Island – Key High Level Resident Sentiment Indicators

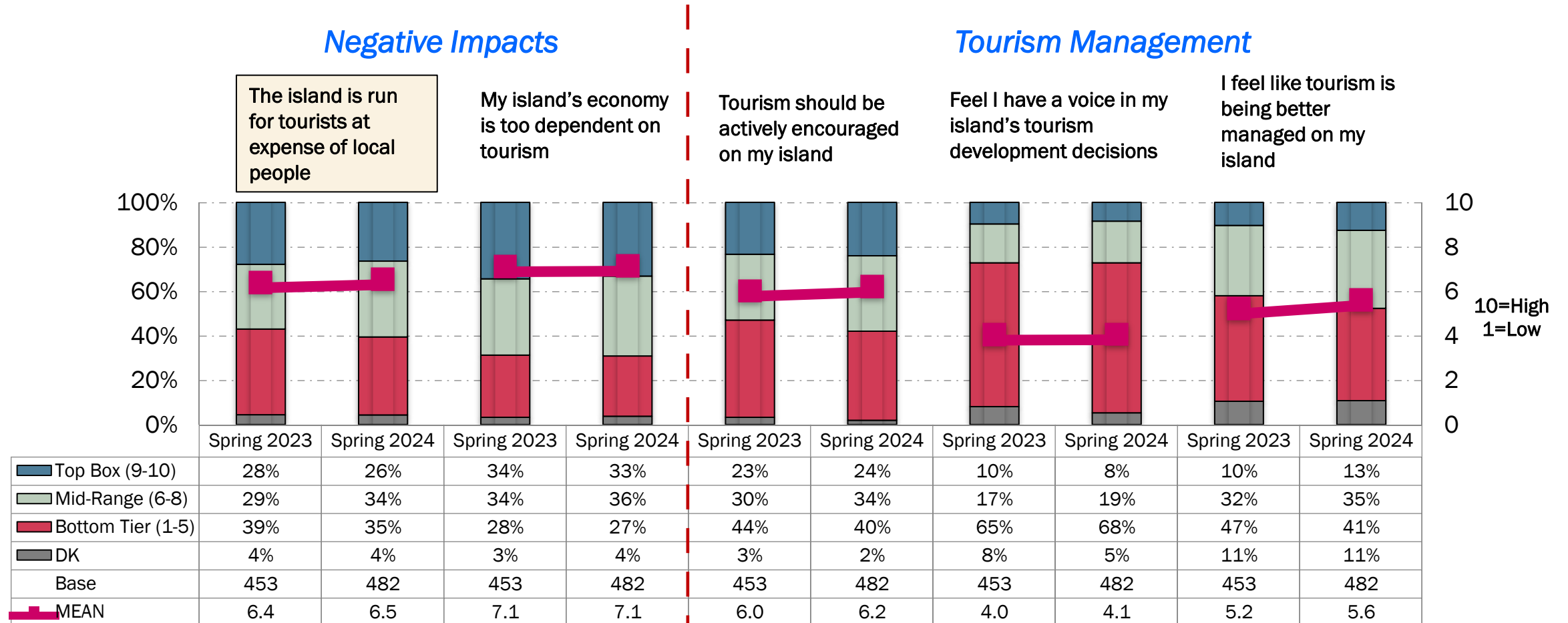


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Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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.

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

Key Recommendations & Takeaways – Kaua‘i

- 1 **Key indicators are gaining however, negative sentiment remains an issue in 2024:** Improvements in perceptions that tourism’s benefits outweigh the problems and that the industry is better for families rose. However, more also believe Kaua‘i is being run for tourists at the expense of locals.

Key Resident Sentiment Tracking Statements (Kaua‘i)

Mean Score	Spring 2022	Fall 2022	Spring 2023	Spring 2024
Tourism has brought more benefits than problems	5.61	5.72	5.81	6.20
Perceived impact of tourism on you and your family	5.97	6.14	6.36	6.61
Tourism is being better managed on my island	4.79	5.04	5.41	5.77
My island is run for tourists at expense of local people	7.43	7.15	7.14	7.55

The idea that tourism creates job opportunities and supports other industries such as agriculture and technology are two bright spots where Kaua‘i residents are more optimistic compared to other parts of the State.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
Creates job opportunities	7.5	7.4	7.6	7.9
Tourism supports other industries important to residents like agriculture and technology	6.3	6.2	5.9	6.4

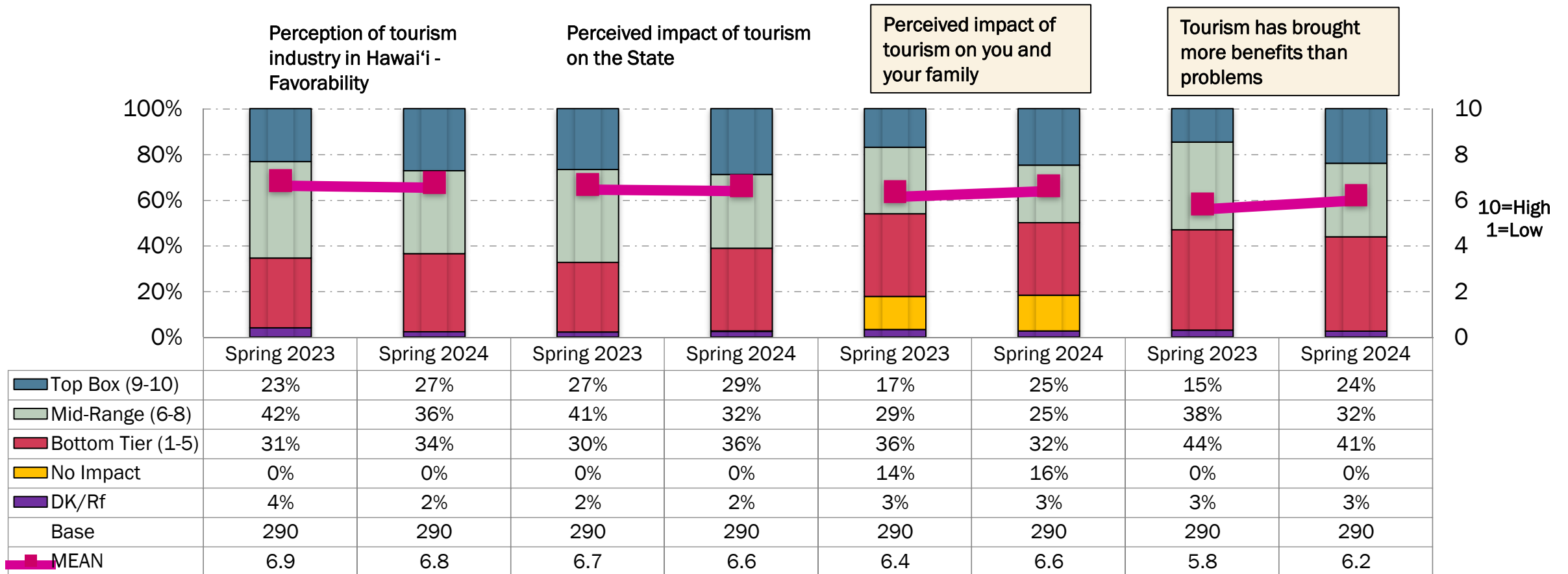
*Red font indicates questions where higher ratings are worse for tourism sentiment.

- 2 **Resident sentiment is similar across Kaua‘i communities:** There are no significant differences between key tracking statements across the island, indicating that each area of the island shares similar sentiment towards the benefits and problems of tourism on the island.

- 3 **Destination Stewardship Awareness:** With more than half (56%) of Kaua‘i residents aware of at least one Hawai‘i Tourism Authority Destination Stewardship initiative being undertaken on the island, awareness levels on Kaua‘i are comparable with the rest of the state. Familiarity with specific initiatives such as policy efforts on appropriate behavior for visitors/residents, managing overtourism, and developing educational materials is much higher and varies by program. There are also few differences in perceptions of these initiatives across communities.

Percent Aware	North/East Kaua‘i	South/West Kaua‘i
Focus policy efforts on appropriate behavior that will instill value in both visitors and residents for our natural and cultural resources (Mālama ‘Āina)	44%	44%
Focus policies that address overtourism by managing people while on Kaua‘i	33%	36%
Develop educational materials for visitors and new residents to have respect for our local cultural values	44%	49%

Kaua'i – Key High Level Resident Sentiment Indicators

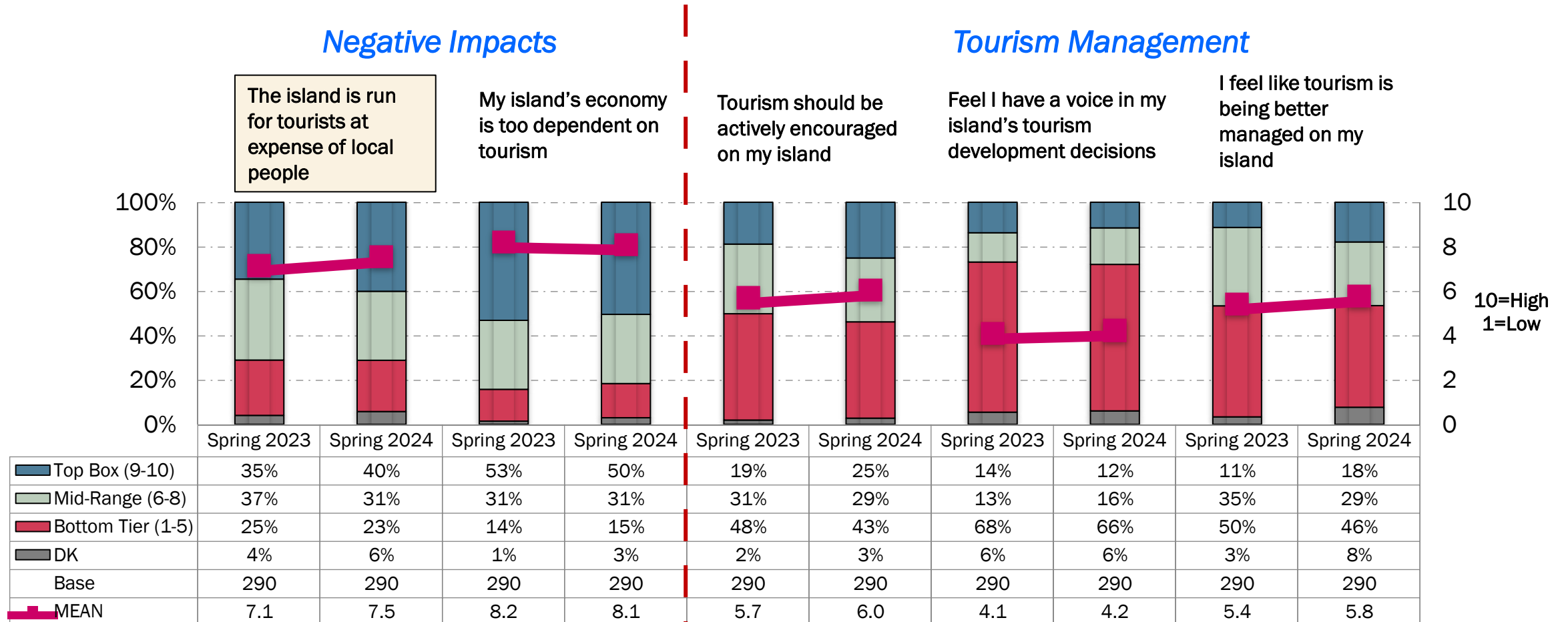


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

Kaua'i – Key Island-Specific Resident Sentiment Indicators

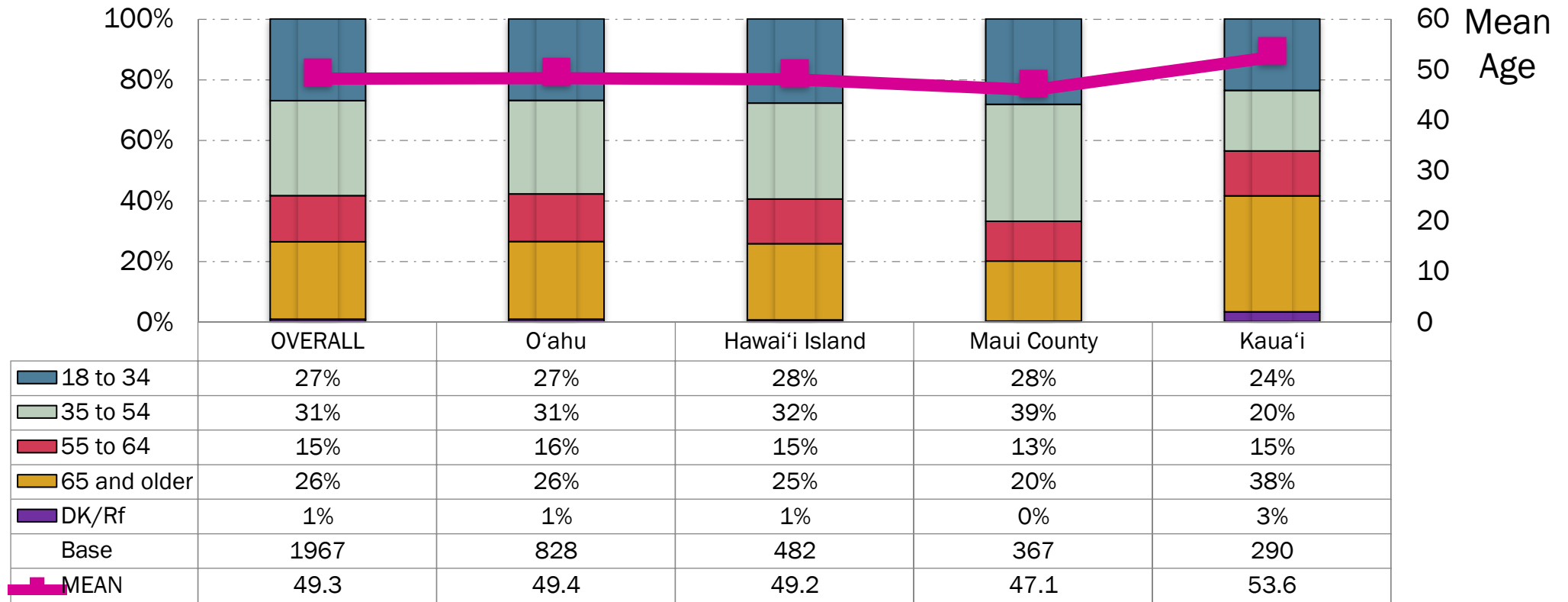


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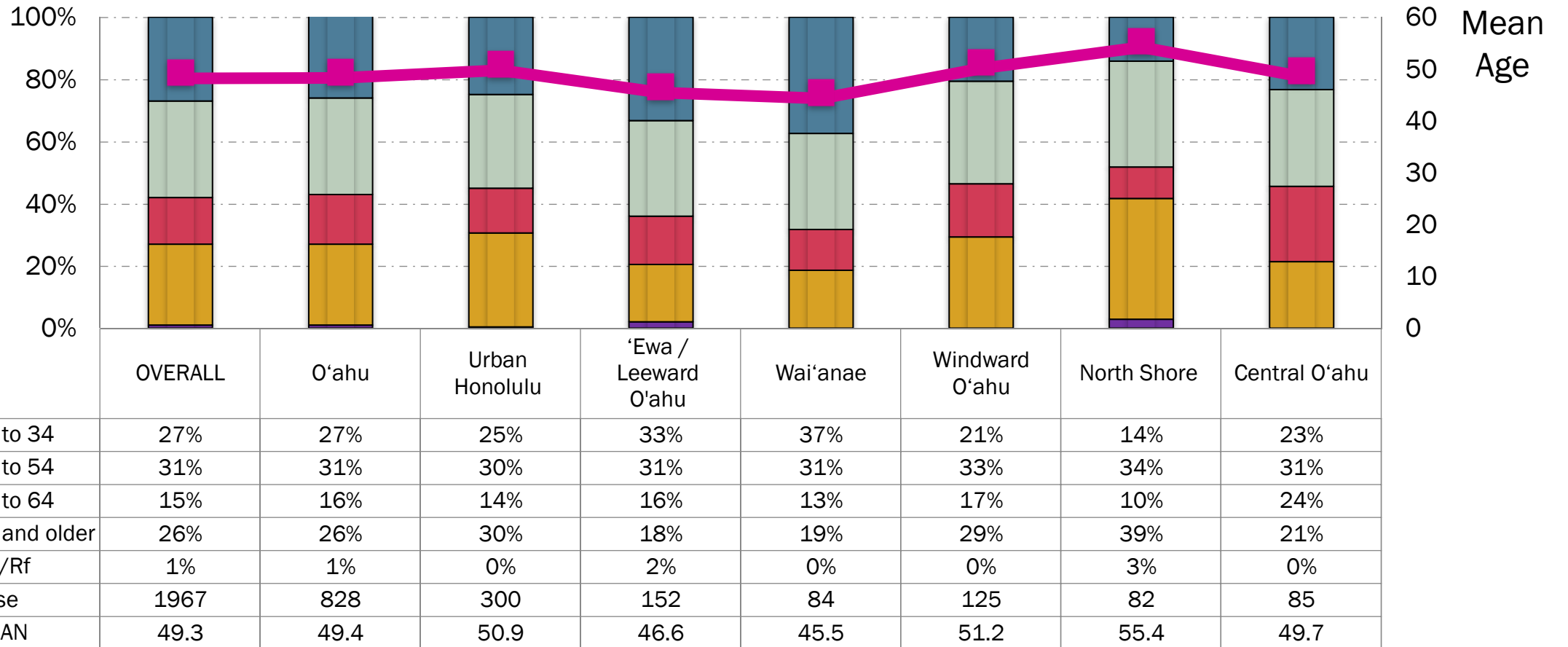
Appendix B: Respondent Profile

Respondent Age



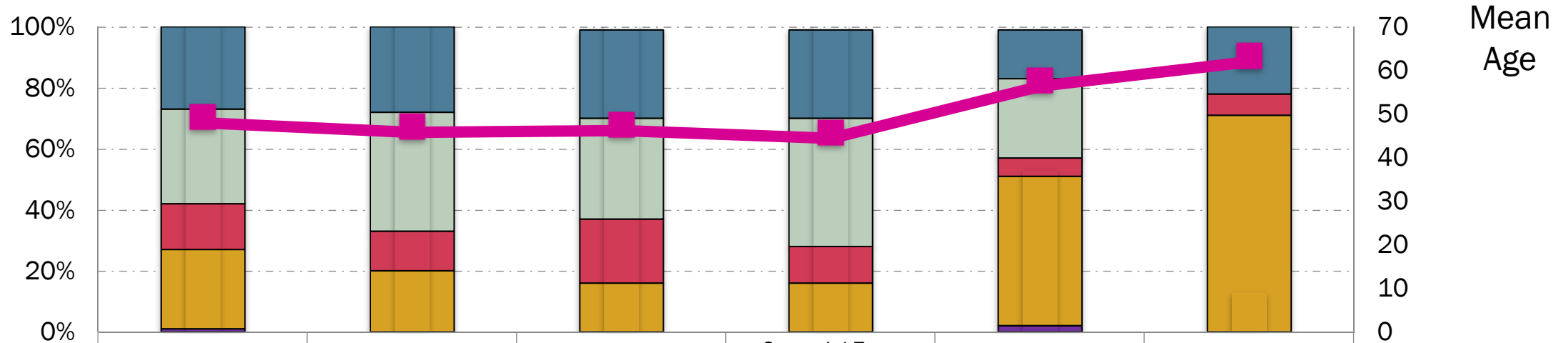
D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

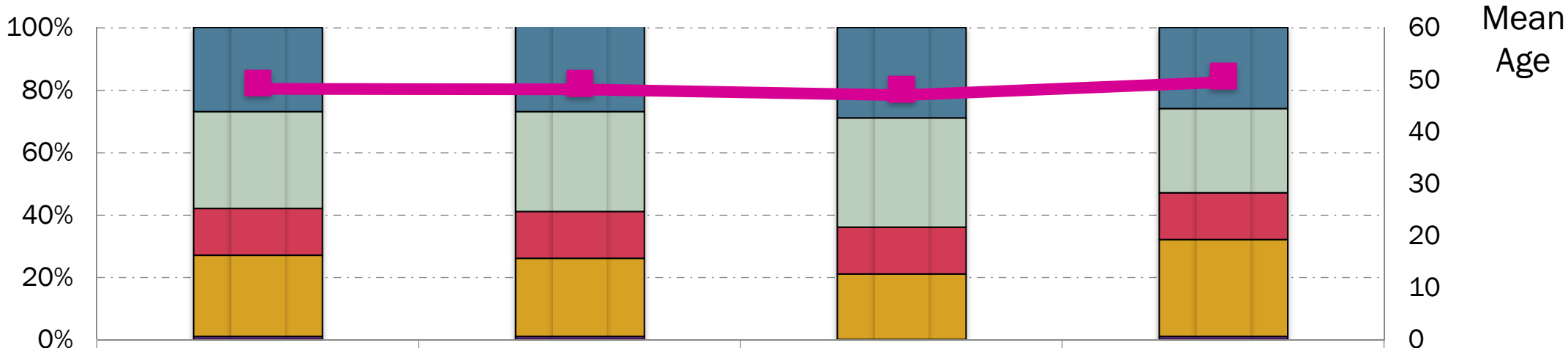
Respondent Age (*By Area - Maui County*)



	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
18 to 34	27%	28%	29%	29%	16%	22%
35 to 54	31%	39%	33%	42%	26%	0%
55 to 64	15%	13%	21%	12%	6%	7%
65 and older	26%	20%	16%	16%	49%	71%
DK/Rf	1%	0%	0%	0	2%	0
Base	1967	367	125	196	37	9
MEAN	49.3	47.1	47.5	45.7	57.7	63.3

D1: What was your age on your last birthday?

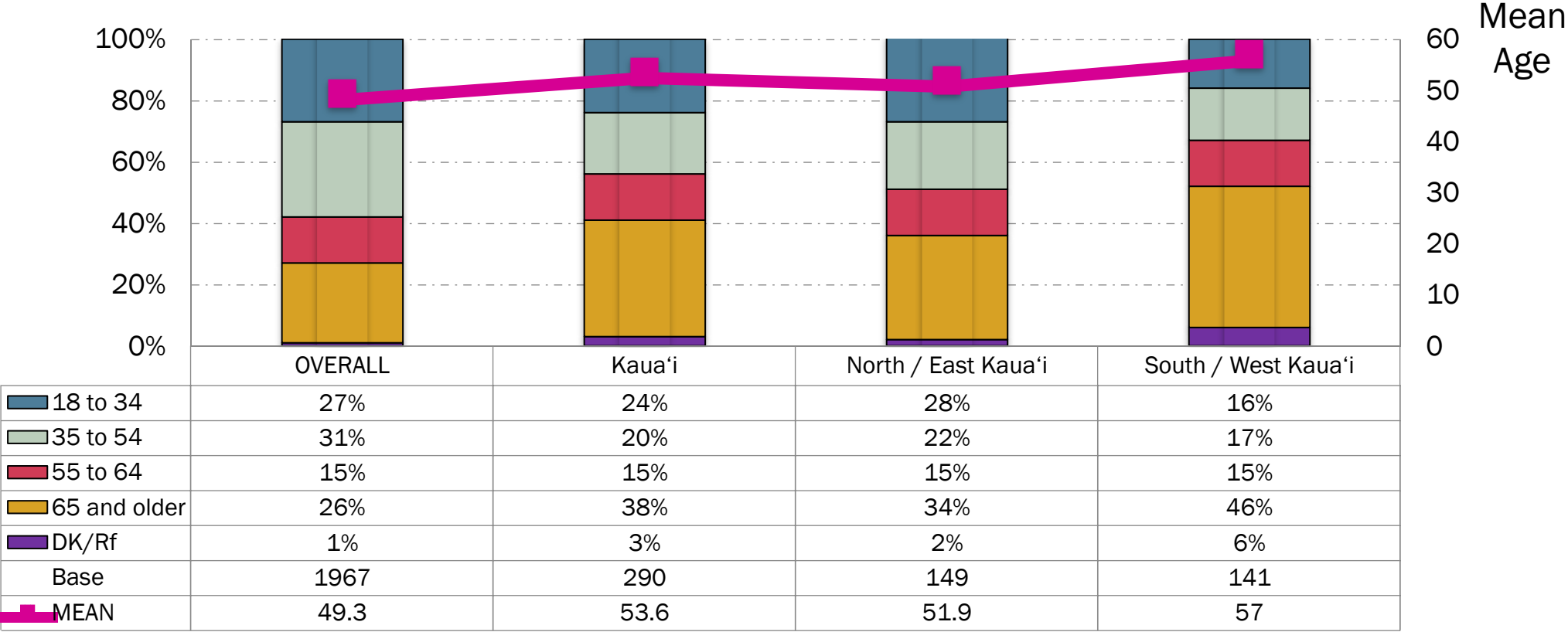
Respondent Age (*By Area - Hawai'i Island*)



	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
18 to 34	27%	28%	29%	26%
35 to 54	31%	32%	35%	27%
55 to 64	15%	15%	15%	15%
65 and older	26%	25%	21%	31%
DK/Rf	1%	1%	0%	1%
Base	1967	482	254	228
MEAN	49.3	49.2	48.1	50.6

D1: What was your age on your last birthday?

Respondent Age (*By Area - Kaua'i*)



D1: What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
Caucasian	19%	15%	30%	28%	28%
Japanese	18%	22%	9%	7%	10%
Hawaiian	23%	22%	26%	28%	23%
Filipino	10%	9%	9%	14%	18%
Other	30%	33%	26%	22%	21%

D2: What is your ethnic background?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Caucasian	19%	15%	15%	12%	9%	21%	24%	17%
Japanese	18%	22%	26%	23%	3%	19%	4%	22%
Hawaiian	23%	22%	13%	20%	57%	33%	45%	19%
Filipino	10%	9%	5%	17%	4%	7%	14%	9%
Other	30%	33%	41%	29%	26%	20%	13%	32%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Caucasian	19%	30%	24%	37%
Japanese	18%	9%	12%	4%
Hawaiian	23%	26%	26%	26%
Filipino	10%	9%	10%	8%
Other	30%	26%	27%	25%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Caucasian	19%	28%	26%	31%	15%	5%
Japanese	18%	7%	6%	8%	2%	-
Hawaiian	23%	28%	34%	23%	64%	48%
Filipino	10%	14%	21%	12%	11%	37%
Other	30%	22%	14%	26%	8%	10%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Caucasian	19%	28%	29%	27%
Japanese	18%	10%	8%	13%
Hawaiian	23%	23%	24%	22%
Filipino	10%	18%	17%	20%
Other	30%	21%	22%	18%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	47%	48%	48%	43%	51%
3-4	31%	30%	34%	33%	23%
5-6	13%	13%	11%	12%	14%
7+	6%	5%	4%	9%	10%
REFUSED	5%	5%	4%	4%	6%
MEAN	3.1	3.0	2.9	3.3	3.1

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

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
1-2	47%	48%	58%	43%	30%	38%	36%	45%
3-4	31%	30%	28%	28%	30%	39%	31%	35%
5-6	13%	13%	10%	18%	21%	14%	12%	5%
7+	6%	5%	1%	7%	13%	6%	18%	4%
REFUSED	5%	5%	3%	6%	5%	5%	8%	10%
MEAN	3.1	3.0	2.6	3.3	3.8	3.2	4.0	3.0

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

Household Size (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
1-2	47%	48%	50%	46%
3-4	31%	34%	36%	30%
5-6	13%	11%	9%	14%
7+	6%	4%	3%	6%
REFUSED	5%	4%	2%	6%
MEAN	3.1	2.9	2.8	3.0

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

Household Size (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
1-2	47%	43%	50%	39%	53%	71%
3-4	31%	33%	28%	35%	15%	29%
5-6	13%	12%	7%	13%	24%	-
7+	6%	9%	7%	9%	8%	-
REFUSED	5%	4%	7%	4%	2%	-
MEAN	3.1	3.3	3.0	3.5	3.1	2.1

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

Household Size (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	47%	51%	52%	50%
3-4	31%	23%	22%	24%
5-6	13%	14%	15%	12%
7+	6%	10%	8%	14%
REFUSED	5%	6%	6%	7%
MEAN	3.1	3.1	3.0	3.1

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

Marital Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Single, never married	31%	32%	28%	29%	29%
Married	42%	42%	41%	42%	46%
Divorced, separated, widowed	16%	15%	20%	14%	16%
Domestic Partnership	7%	7%	8%	10%	2%
Other	0%	0%	0%	0%	1%
Refused	3%	3%	2%	4%	5%

D4: What is your marital status?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Single, never married	31%	32%	36%	31%	32%	30%	22%	22%
Married	42%	42%	40%	40%	34%	47%	58%	51%
Divorced, separated, widowed	16%	15%	17%	12%	19%	15%	15%	16%
Domestic Partnership	7%	7%	6%	11%	12%	5%	-	2%
Other	0%	0%	-	1%	1%	-	-	-
Refused	3%	3%	1%	5%	2%	2%	4%	9%

D4: What is your marital status?

Marital Status (*By Area – Hawai‘i Island*)

	OVERALL	Hawai‘i Island	East Hawai‘i Island	West Hawai‘i Island
Single, never married	31%	28%	35%	19%
Married	42%	41%	35%	49%
Divorced, separated, widowed	16%	20%	20%	21%
Domestic Partnership	7%	8%	8%	7%
Other	0%	0%	0%	0%
Refused	3%	2%	1%	4%

D4: What is your marital status?

Marital Status (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Single, never married	31%	29%	30%	31%	14%	5%
Married	42%	42%	46%	39%	56%	69%
Divorced, separated, widowed	16%	14%	14%	14%	21%	19%
Domestic Partnership	7%	10%	8%	11%	4%	-
Other	0%	0%	-	0%	-	7%
Refused	3%	4%	1%	5%	5%	-

D4: What is your marital status?

Marital Status (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Single, never married	31%	29%	32%	23%
Married	42%	46%	43%	52%
Divorced, separated, widowed	16%	16%	17%	15%
Domestic Partnership	7%	2%	2%	3%
Other	0%	1%	2%	-
Refused	3%	5%	3%	7%

D4: What is your marital status?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	23%	21%	28%	32%	26%
Bus/Trade School/ Some college	27%	25%	35%	30%	30%
College Graduate	48%	52%	35%	37%	39%
DK/Refused	2%	2%	2%	1%	6%

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

Education (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
H.S. or less	23%	21%	14%	21%	46%	26%	24%	24%
Bus/Trade School/ Some college	27%	25%	23%	29%	34%	22%	24%	22%
College Graduate	48%	52%	63%	47%	18%	51%	48%	49%
DK/Refused	2%	2%	1%	3%	2%	1%	4%	5%

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

Education (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
H.S. or less	23%	28%	30%	24%
Bus/Trade School/ Some college	27%	35%	35%	35%
College Graduate	48%	35%	34%	37%
DK/Refused	2%	2%	1%	4%

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

Education (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
H.S. or less	23%	32%	35%	32%	20%	61%
Bus/Trade School/ Some college	27%	30%	27%	31%	31%	10%
College Graduate	48%	37%	36%	36%	47%	22%
DK/Refused	2%	1%	2%	0%	2%	7%

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

Education (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
H.S. or less	23%	26%	24%	29%
Bus/Trade School/ Some college	27%	30%	34%	23%
College Graduate	48%	39%	37%	41%
DK/Refused	2%	6%	5%	7%

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

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	60%	60%	56%	64%	52%
Not Employed	40%	40%	44%	36%	48%

D6: Are you currently employed?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Currently Employed	60%	60%	62%	61%	43%	55%	57%	69%
Not Employed	40%	40%	38%	39%	57%	45%	43%	31%

D6: Are you currently employed?

Employment Status (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Currently Employed	60%	56%	57%	56%
Not Employed	40%	44%	43%	44%

D6: Are you currently employed?

Employment Status (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Currently Employed	60%	64%	58%	68%	31%	40%
Not Employed	40%	36%	42%	32%	69%	60%

D6: Are you currently employed?

Employment Status (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	60%	52%	53%	50%
Not Employed	40%	48%	47%	50%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	49%	50%	49%	41%	44%
FEMALE	49%	48%	49%	58%	55%
OTHER	2%	2%	2%	2%	1%

D7: What is your gender?

Gender (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
MALE	49%	50%	51%	51%	36%	56%	51%	48%
FEMALE	49%	48%	47%	46%	61%	44%	49%	49%
OTHER	2%	2%	2%	3%	3%	-	-	3%

D7: What is your gender?

Gender (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
MALE	49%	49%	52%	45%
FEMALE	49%	49%	47%	52%
OTHER	2%	2%	1%	3%

D7: What is your gender?

Gender (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
MALE	49%	41%	36%	42%	32%	50%
FEMALE	49%	58%	63%	56%	68%	43%
OTHER	2%	2%	1%	2%	-	7%

D7: What is your gender?

Gender (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
MALE	49%	44%	42%	48%
FEMALE	49%	55%	57%	52%
OTHER	2%	1%	1%	1%

D7: What is your gender?

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Chairman/President/ CEO/Executive	2%	2%	3%	1%	1%
Management	7%	8%	5%	7%	6%
Partner/owner/ Proprietor	2%	2%	2%	2%	4%
Professional	13%	14%	10%	8%	6%
Technical	3%	3%	5%	2%	3%
Sales	7%	6%	7%	13%	8%
Service for hotel/restaurant, etc.	5%	4%	5%	10%	6%
Administrative/ clerical	6%	7%	3%	6%	6%
Other	10%	9%	12%	10%	6%
Not employed/ Retired	45%	45%	48%	40%	55%

D8: What is your occupation?

Occupation (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Chairman/CEO/ Executive	2%	2%	2%	3%	-	-	1%	-
Management	7%	8%	9%	6%	3%	11%	1%	11%
Partner/owner/ Proprietor	2%	2%	2%	-	-	2%	3%	3%
Professional	13%	14%	15%	17%	6%	15%	11%	11%
Technical	3%	3%	6%	2%	5%	2%	2%	-
Sales	7%	6%	7%	6%	3%	4%	4%	10%
Service for hotel/restaurant, etc.	5%	4%	2%	5%	14%	-	8%	3%
Administrative/ clerical	6%	7%	8%	7%	2%	8%	4%	11%
Other	10%	9%	6%	11%	4%	8%	17%	17%
Not employed/ Retired	45%	45%	44%	42%	63%	50%	48%	35%

D8: What is your occupation?

Occupation (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Chairman/CEO/ Executive	2%	3%	2%	3%
Management	7%	5%	4%	7%
Partner/owner/ Proprietor	2%	2%	2%	2%
Professional	13%	10%	12%	8%
Technical	3%	5%	4%	5%
Sales	7%	7%	4%	10%
Service for hotel/restaurant, etc.	5%	5%	7%	3%
Administrative/ clerical	6%	3%	4%	2%
Other	10%	12%	14%	9%
Not employed/ Retired	45%	48%	46%	51%

D8: What is your occupation?

Occupation (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Chairman/CEO/ Executive	2%	1%	2%	0%	-	-
Management	7%	7%	3%	8%	-	-
Partner/owner/ Proprietor	2%	2%	-	3%	-	-
Professional	13%	8%	10%	8%	9%	-
Technical	3%	2%	3%	2%	3%	-
Sales	7%	13%	11%	14%	4%	16%
Service for hotel/restaurant, etc.	5%	10%	14%	10%	-	19%
Administrative/ clerical	6%	6%	6%	7%	7%	-
Other	10%	10%	7%	12%	5%	-
Not employed/ Retired	45%	40%	44%	36%	72%	64%

D8: What is your occupation?

Occupation (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Chairman/CEO/ Executive	2%	1%	-	2%
Management	7%	6%	6%	6%
Partner/owner/ Proprietor	2%	4%	5%	4%
Professional	13%	6%	5%	6%
Technical	3%	3%	2%	4%
Sales	7%	8%	10%	4%
Service for hotel/restaurant, etc.	5%	6%	5%	8%
Administrative/ clerical	6%	6%	7%	4%
Other	10%	6%	5%	6%
Not employed/ Retired	45%	55%	55%	56%

D8: What is your occupation?

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	13%	11%	20%	14%	12%
\$25K-\$35K	9%	8%	12%	13%	7%
\$35K-\$50K	9%	9%	12%	9%	8%
\$50K-\$75K	12%	12%	14%	15%	11%
\$75K-\$100K	14%	14%	13%	14%	13%
\$100K-\$150K	17%	17%	13%	16%	21%
\$150K-\$200K	9%	10%	5%	7%	7%
\$200K+	7%	8%	4%	3%	3%
DK/ Rf	12%	13%	7%	7%	18%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2022?
Just stop me when I come to the correct category?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
<\$25K	13%	11%	8%	15%	25%	7%	10%	6%
\$25K-\$35K	9%	8%	7%	8%	12%	8%	9%	5%
\$35K-\$50K	9%	9%	9%	8%	6%	11%	10%	7%
\$50K-\$75K	12%	12%	10%	10%	18%	6%	16%	24%
\$75K-\$100K	14%	14%	19%	8%	4%	10%	14%	21%
\$100K-\$150K	17%	17%	18%	19%	16%	18%	16%	8%
\$150K-\$200K	9%	10%	9%	10%	5%	14%	5%	12%
\$200K+	7%	8%	10%	7%	1%	10%	6%	5%
DK/ Rf	12%	13%	11%	14%	13%	16%	14%	11%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2022?
Just stop me when I come to the correct category?

Household Income (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
<\$25K	13%	20%	25%	14%
\$25K-\$35K	9%	12%	12%	12%
\$35K-\$50K	9%	12%	13%	9%
\$50K-\$75K	12%	14%	16%	10%
\$75K-\$100K	14%	13%	11%	16%
\$100K-\$150K	17%	13%	10%	17%
\$150K-\$200K	9%	5%	3%	7%
\$200K+	7%	4%	4%	4%
DK/ Rf	12%	7%	6%	9%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2022?
Just stop me when I come to the correct category?

Household Income (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
<\$25K	13%	14%	11%	14%	29%	10%
\$25K-\$35K	9%	13%	12%	13%	2%	56%
\$35K-\$50K	9%	9%	11%	10%	1%	-
\$50K-\$75K	12%	15%	21%	13%	32%	15%
\$75K-\$100K	14%	14%	7%	16%	9%	-
\$100K-\$150K	17%	16%	14%	18%	5%	7%
\$150K-\$200K	9%	7%	11%	7%	2%	-
\$200K+	7%	3%	3%	4%	-	-
DK/ Rf	12%	7%	10%	5%	20%	12%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2022?
Just stop me when I come to the correct category?

Household Income (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
<\$25K	13%	12%	14%	10%
\$25K-\$35K	9%	7%	6%	8%
\$35K-\$50K	9%	8%	11%	3%
\$50K-\$75K	12%	11%	12%	9%
\$75K-\$100K	14%	13%	16%	8%
\$100K-\$150K	17%	21%	22%	18%
\$150K-\$200K	9%	7%	6%	9%
\$200K+	7%	3%	1%	6%
DK/ Rf	12%	18%	12%	29%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2022?
Just stop me when I come to the correct category?

Years in Hawai'i

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Less than 10 years	13%	12%	20%	14%	12%
10 to 19 years	9%	8%	8%	15%	6%
20 years or more	22%	22%	22%	22%	25%
Born in Hawai'i	54%	56%	48%	47%	53%
DK/ Rf	2%	2%	2%	2%	4%

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

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Less than 10 years	13%	12%	14%	11%	13%	5%	13%	11%
10 to 19 years	9%	8%	9%	9%	1%	5%	5%	11%
20 years or more	22%	22%	20%	27%	16%	20%	24%	23%
Born in Hawai'i	54%	56%	57%	49%	66%	69%	56%	53%
DK/ Rf	2%	2%	1%	5%	5%	1%	2%	2%

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

Years in Hawai'i (*By Area - Hawai'i Island*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Less than 10 years	13%	20%	16%	25%
10 to 19 years	9%	8%	8%	9%
20 years or more	22%	22%	22%	22%
Born in Hawai'i	54%	48%	54%	40%
DK/ Rf	2%	2%	0%	4%

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

Years in Hawai'i (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Less than 10 years	13%	14%	12%	16%	7%	0%
10 to 19 years	9%	15%	9%	18%	-	-
20 years or more	22%	22%	26%	20%	24%	42%
Born in Hawai'i	54%	47%	51%	45%	66%	51%
DK/ Rf	2%	2%	3%	1%	3%	7%

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

Years in Hawai'i (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Less than 10 years	13%	12%	16%	5%
10 to 19 years	9%	6%	8%	2%
20 years or more	22%	25%	25%	25%
Born in Hawai'i	54%	53%	49%	60%
DK/ Rf	2%	4%	2%	8%

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



Appendix C: Resident Sentiment Drivers Analysis

Executive Summary: Drivers of Resident Sentiment

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

- I have a voice in my island's tourism development decisions: 15%
- Supports local businesses: 11%
- Creates job opportunities for residents: 11%
- Supports festivals, activities, & sport events: 10%
- Safety: 9%

Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits (50%)	Supports local businesses	11%
	Creates job opportunities for residents	11%
	Supports festivals, activities & sports events for residents & visitors	10%
	Creates shopping, restaurants and entertainment opportunities for residents	8%
	Should be actively encouraged on my island	4%
	Is an industry that enhances residents' quality of life	3%
	Creates jobs opportunities with paths for advancement	2%
	Supports other industries like agriculture and technology	1%
	Helps fund the stewardship of Hawai'i's natural resources, parks and cultural sites	0%
	<i>Note: Previous years' driver included "Managed Tourism"</i>	
<i>Spring '23 74%</i>		
<i>Fall '22 82%</i>		
<i>Fall '21 77%</i>		
<i>Spring '21 79%</i>		
Managed Tourism (27%)	I have a voice in my island's tourism development decisions	15%
	Contributes to the perpetuation of Native Hawaiian culture and language	7%
	More effort is being made to balance economic benefits of tourism and quality of life for residents	5%
	Tourism is being better managed on my island	0%
	Contributes to improvement and maintenance of natural resources in my community	0%
Negative Impacts (12%)	My island's economy is too dependent on tourism	7%
	This island is being run for tourists at the expense of local people	5%
	<i>Spring '23 10%</i>	
	<i>Fall '22 6%</i>	
<i>Fall '21 8%</i>		
<i>Spring '21 11%</i>		
<i>Fall '20 15%</i>		
<i>Spring '20 16%</i>		
Safety (9%)	I feel safe when I travel to visitor destinations in Hawaii	9%
	Authentic presentation of Native Hawaiian language and culture	1%
Hawai'i Culture (2%)	Educate visitors about protecting Hawai'i's natural environment & cultural resources	1%



Mahalo from the Omnitrak Group