

Resident Sentiment Survey - Spring 2022



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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 19 times since 1999, and the current survey was conducted by Omnitrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai'i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.

Statistical Analysis – Within the reports' graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. islands or attributes) in the same year at the 95% level of confidence.

An arrow ↑ or ↓ indicates a statistically significant difference when ratings are compared across years at the 95% confidence level.

Sample Plan and Methodology

Sample Plan

Omnitrak used a region-based stratified sampling for the study, the same approach used in earlier Resident Sentiment survey efforts conducted by Omnitrak. The sampling plan divided the State into 12 sub-regions with consideration to population proportion, and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionate to population distribution per the latest State Census from the state Department of Business, Economic Development and Tourism.

Statewide sampling produced a total of $n = 1955$ respondents as follows:

- O'ahu: 839
- Hawai'i Island: 458
- Maui County: 403
- Kaua'i: 255

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 33%) and online surveys (67%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: May 7 through July 30, 2022



Key Recommendations & Takeaways

Key Recommendations & Takeaways – State Overall

1 *Resident Sentiment towards tourism is taking its first steps in a positive direction:* In Spring '22, sentiment has started to recover from the wave-on-wave declines that began before the Covid-19 pandemic. Public perception that tourism offers more benefits than problems and that the industry is better managed is improving significantly. In turn, the belief that tourism should be actively encouraged on one's island is strengthening. These gains however, were not distributed across the state, with larger advances from O'ahu and Hawai'i Island coupled with declines in Maui and Kaua'i counties.

Furthermore, these recoveries have yet to improve beyond levels seen pre-pandemic and have yet to translate to significant gains in the perception that tourism benefits residents and their families, indicating that much remains to be done.

Key Resident Sentiment Tracking Statements					
Mean Score	2019	2020	Spring 2021	Fall 2021	Spring 2022
<i>Tourism has brought more benefits than problems</i>	6.25	6.02 ↓	5.87	5.67	5.94 ↑
<i>Perceived impact of tourism on you and your family</i>	6.54	6.11	5.91	6.01	6.02
<i>Tourism is being better managed on my island</i>	NA	NA	5.06	5.06	5.33 ↑
<i>Tourism should be actively encouraged on my Island</i>	6.35	6.13	6.07	5.87	6.10
<i>My island is run for tourists at expense of local people</i>	6.80	6.94	6.78	6.98	6.93

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

2 *Support for Managed Tourism Strategies is most pronounced in areas that perceive the most problems generated by the industry:* These strategies are in higher demand on Maui/Kaua'i, areas with lower tourism sentiment compared to O'ahu/Hawai'i Island. This indicates the need for solutions from areas where tourism's perceived problems are troubling residents the most.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
<i>Eliminate illegal vacation rentals</i>	7.85	7.88	8.70	8.84
<i>No additional hotel/ condo units</i>	6.93	6.85	8.42	8.27
<i>Charge access fees to state parks/trails</i>	7.20	7.43	7.96	7.92
<i>Encourage visitors to volunteer/give back</i>	7.10	7.48	7.85	7.90

3 *Sentiment Drivers:* Economic and Quality of Life benefits of tourism (53%) continue to be the most important driver in moving resident sentiment, responsible for influencing half of the public's perception of the industry. This area includes quality of life, job creation, support for local businesses, and festivals/shopping/entertainment. Sustainability & Managed Tourism (25%) was the next major factor influencing sentiment.

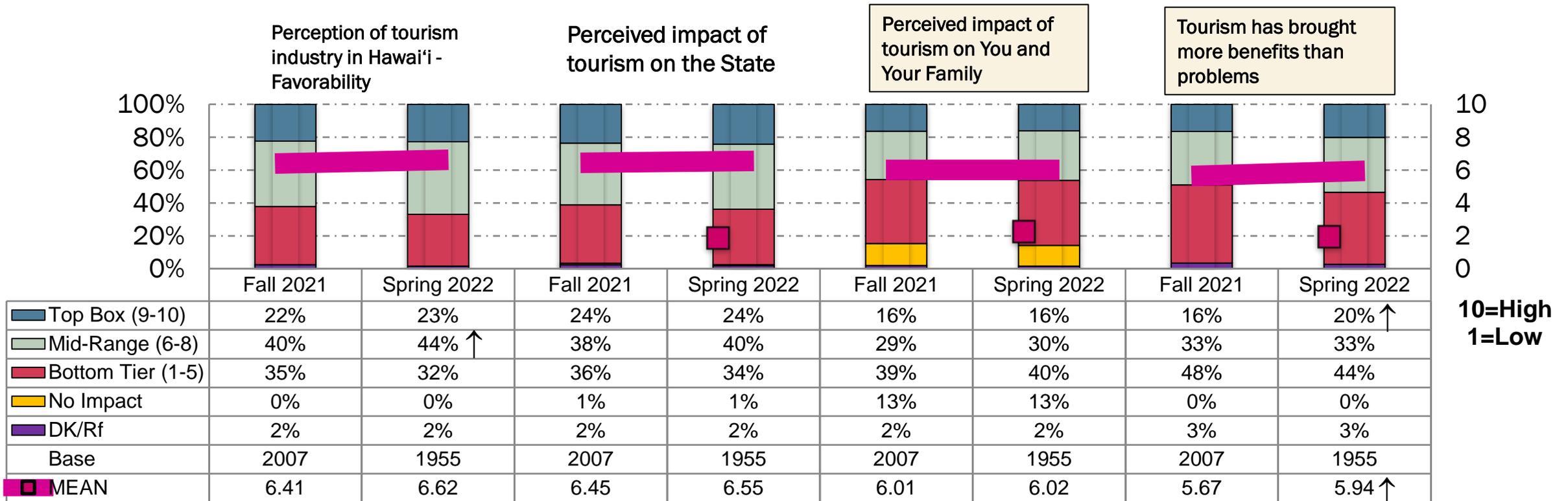
4 *Perception of Hawai'i Tourism Authority's focus areas improved:* Marketing, vision for sustainable tourism, leading the industry, educating visitors, supporting Native Hawaiian culture, and balancing residents' needs; all improved significantly and are a positive indicator that the public recognizes HTA's involvement in these areas.



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

High level key indicators of resident sentiment experienced a gentle recovery in Spring 2022, from lower levels in the period earlier. Notably, perceptions that the industry has brought more benefits compared to problems rose in Top Box (9-10) support, raising the mean rating, and is an encouraging sign that the declines are reversing.



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

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

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

Executive Summary – Economic Impact Indicators

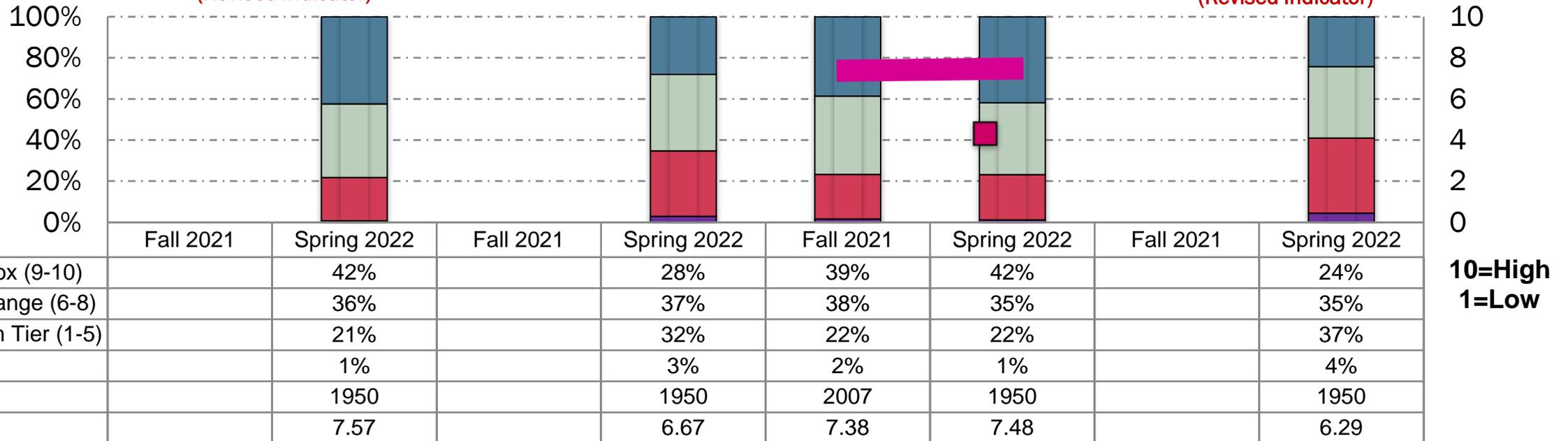
Economic Impact Indicators (i.e., a number of which were revised from previous Resident Sentiment Survey fieldings), pointed to strong resident agreement with tourism’s impact on job creation, supporting local businesses and other industries like agriculture.

Creates job opportunities for residents
(Revised Indicator)

Creates job opportunities with paths for advancement
(Revised Indicator)

Supports our local businesses like retail, dining, etc.

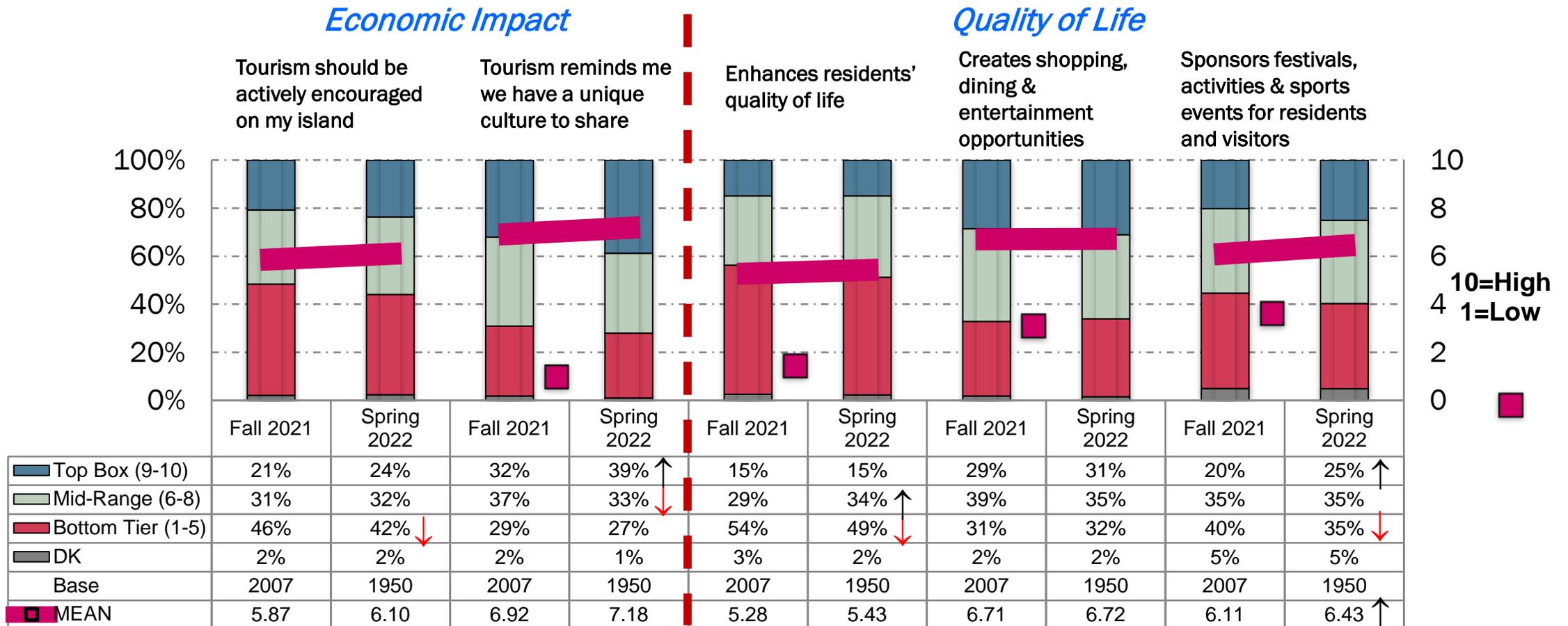
Supports other industries important to residents like agriculture
(Revised Indicator)



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

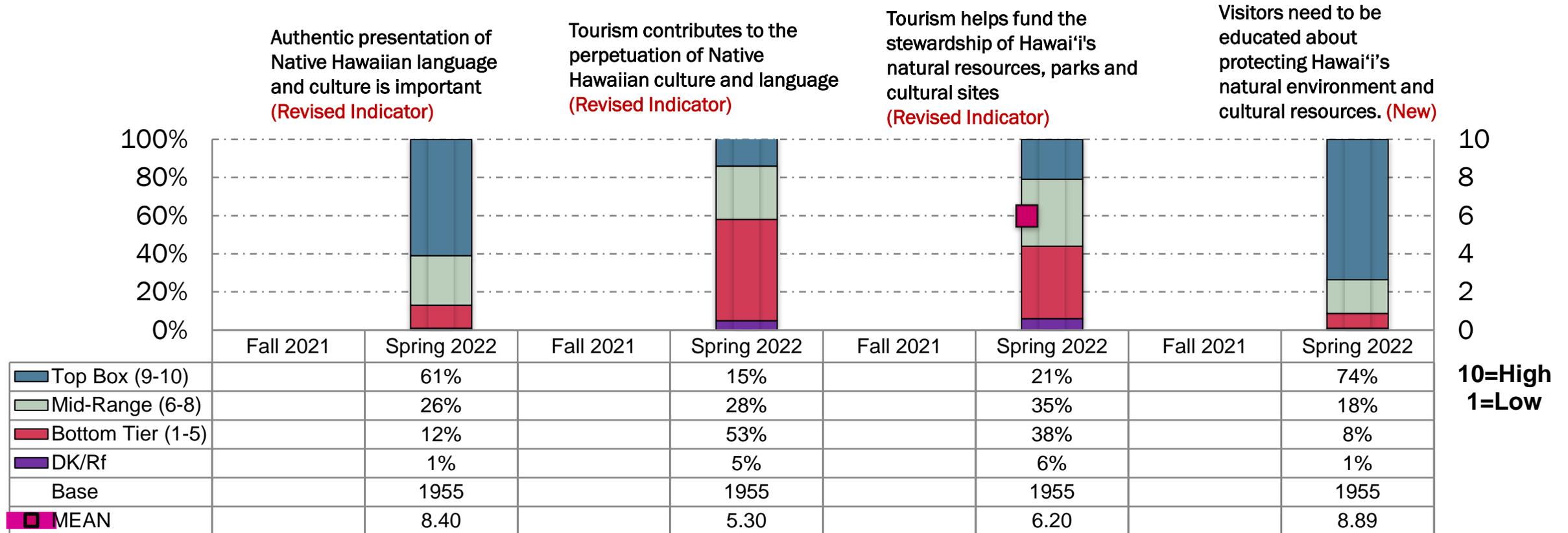
Progress in Economic Impact areas also extended to overall improvements in Quality of life measures, reminding residents that Tourism helps to enhance their quality of life, creates shopping/restaurant/entertainment, and sponsors festivals/events. Advancements in these quality of life areas resulted in stronger support among residents that Tourism should be actively encouraged on their island and that it reminds them they have a unique culture to share.



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

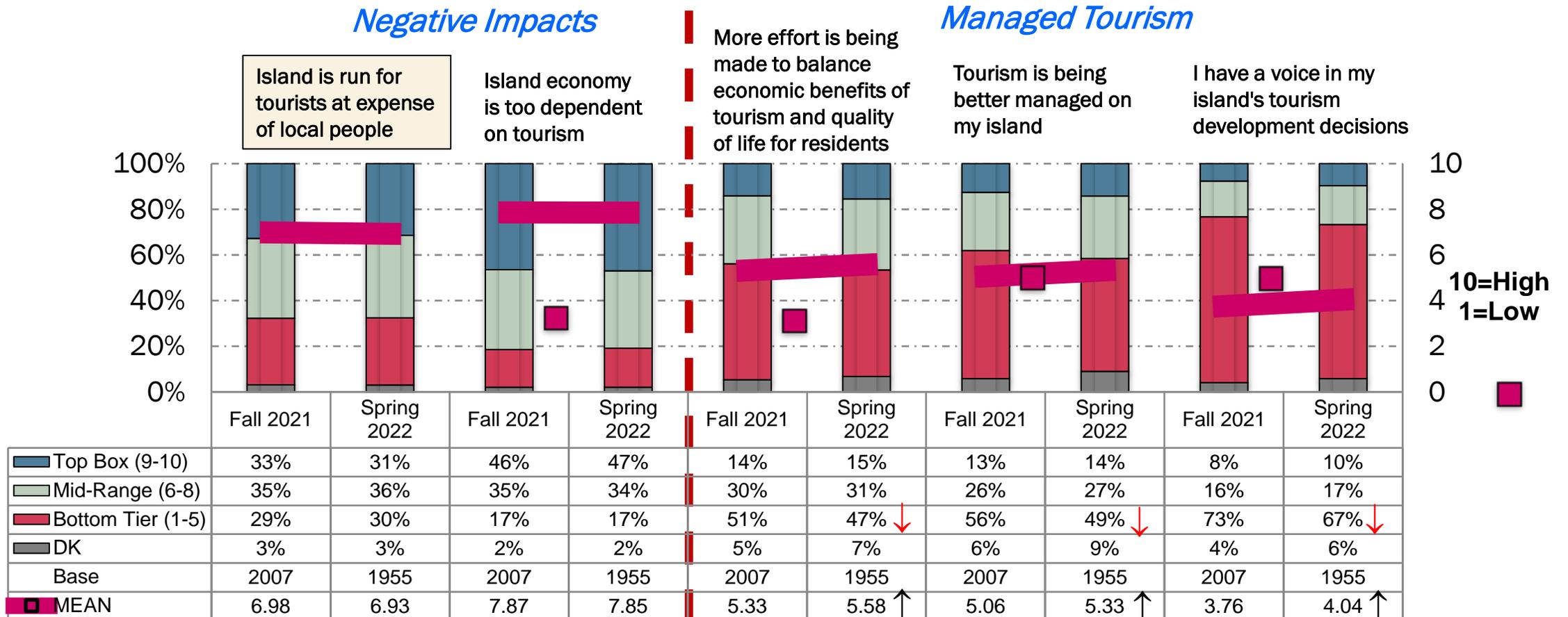
Residents strongly agree that the Authentic presentation of the Native Hawaiian language and culture is important (Top Box (9-10) score, 61%) and that Visitors need to be educated about protecting Hawai'i's natural environment and cultural resources (74%). Residents are less likely to agree that tourism helps fund the stewardship of these resources (21%).



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

Executive Summary – Balance: Negative Impacts/Managed Tourism

Although residents were upbeat on Economic indicators, this did not translate into mitigating some of the negative impacts of the industry – sentiment was largely unchanged in opinions that their island is being run for tourists or that they are too dependent on the industry. On a positive note, resident perceptions regarding managed tourism continued to improve with stronger agreement that more effort is being made to balance the economic benefits with quality of life impact, that the industry is being better managed, and that more residents feel they have a voice in the matter.



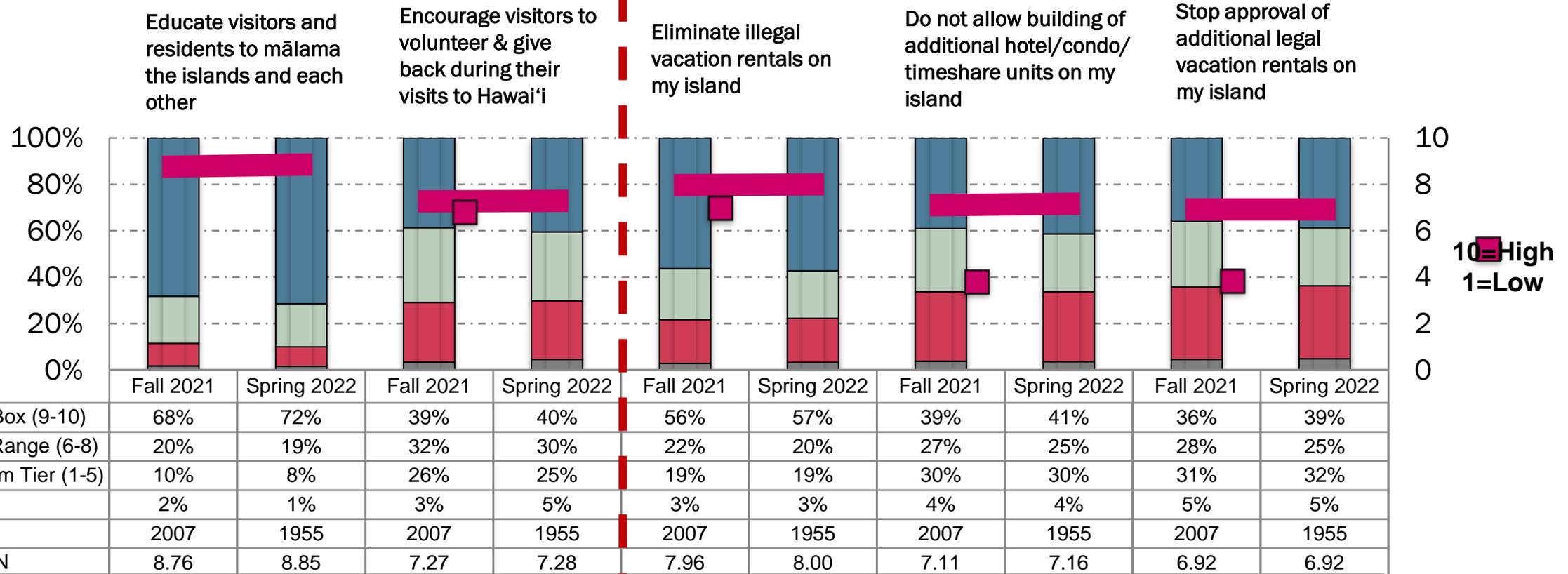
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary - Importance of Select Managed Tourism Strategies

Managed tourism strategies offer a solution to some of the perceived negative effects of the industry. Public support for areas in Regeneration (educating/encouraging visitors) and improving Accommodation strategies (better management of rentals, accommodations) strengthened slightly during this period with directional increases.

Regenerative

Accommodations

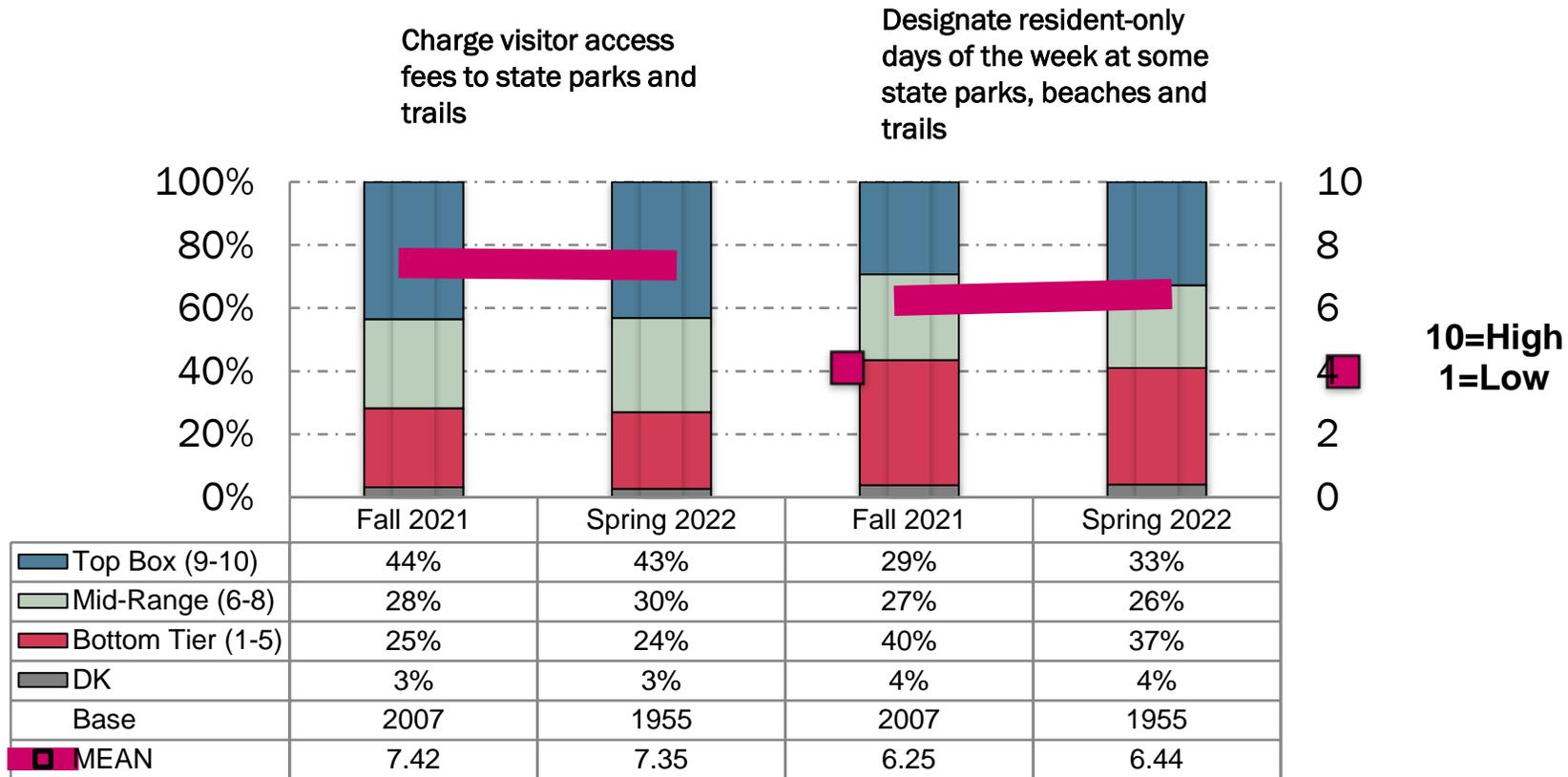


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

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

Charging visitors fees to access State parks and trails dipped slightly on a directional basis, but remained a favored option among residents, along with designating resident only days to access sites.

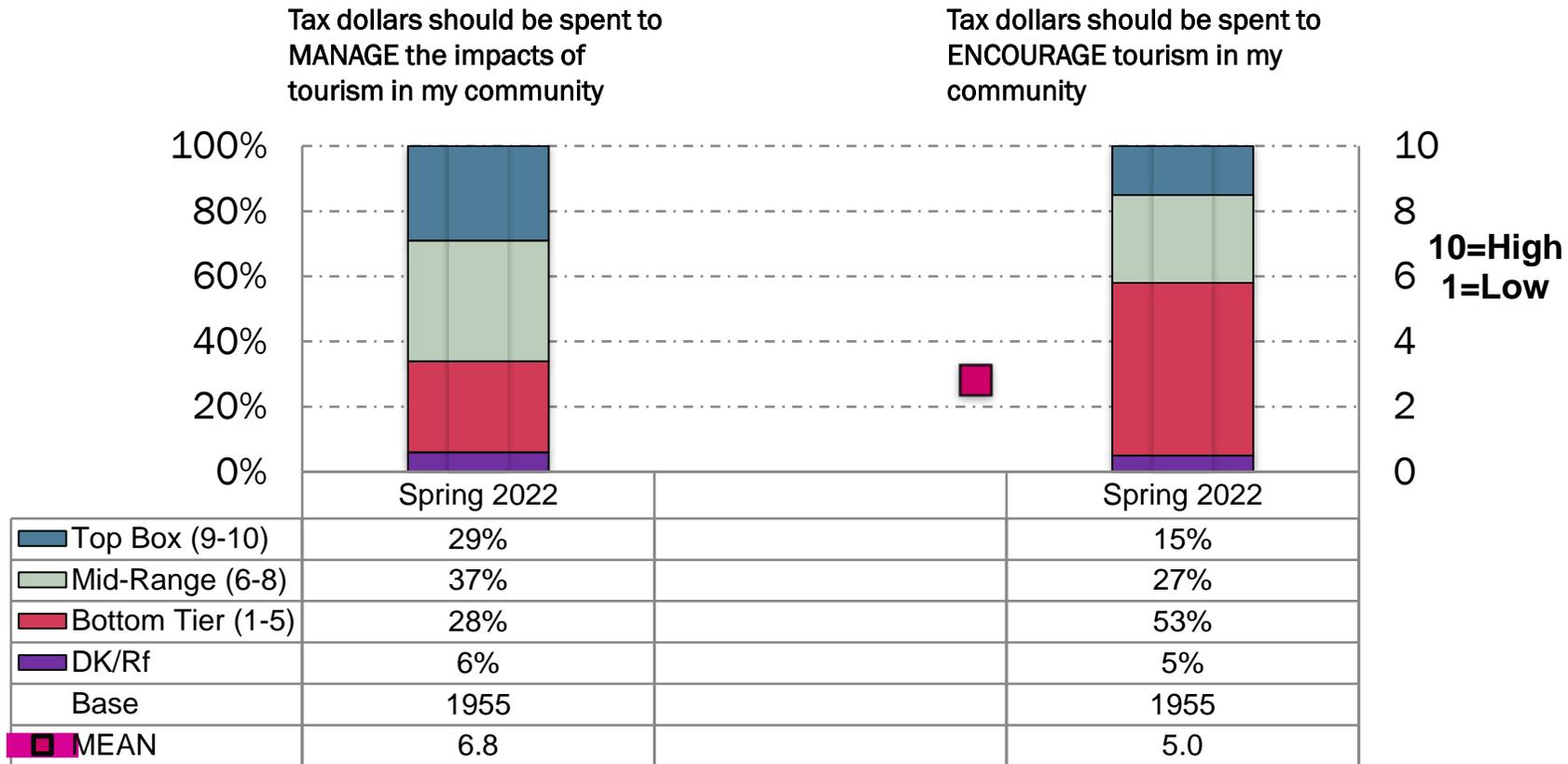
Access



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

Executive Summary – Taxes should be spent to Manage/Encourage Tourism

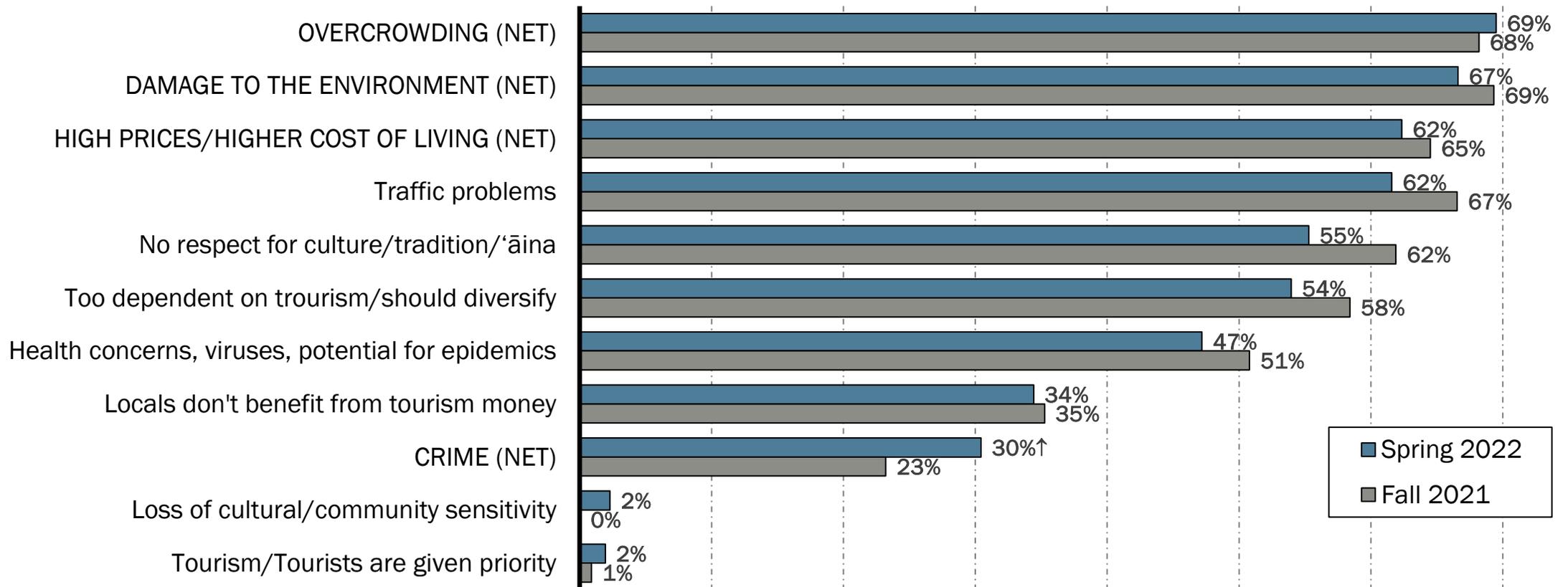
Public support for using tax revenues to fund Tourism management, specifically to manage the impacts of tourism in residents' communities, was favorable with a 6.8/10 mean rating and 29 percent expressing Top Box (9-10) or strong support. A plurality of residents (37%) tilted favorably but did not provide strong support. On the matter of using taxes to encourage tourism, residents were neutral, providing a 5/10 and did not express a strong preference in either direction.



Executive Summary – Problems Created by Tourism in Hawai‘i

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

Overcrowding and **Damage to the environment** remained the top concerns in Spring 2022, followed closely by **Higher prices** and **Traffic**. There was little change from Fall 2021 on the top concerns created by the industry. Although this was not a top concern, **Crime** mentions rose significantly and was noted by 30 percent of residents who said the industry created more problems than benefits.

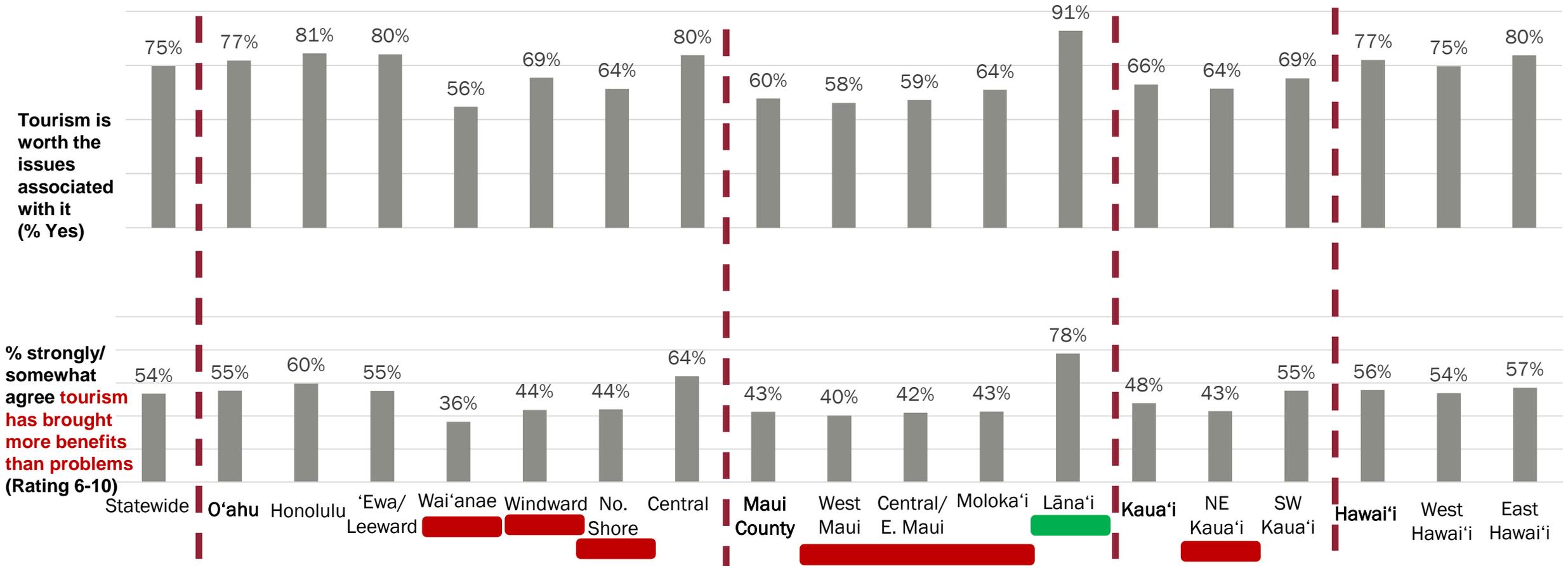


Base: Spring 2022 (856), Fall 2021 (973)

Q5a. In your opinion, what problems do you think tourism has created in Hawai‘i?

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

On the community level, residents were particularly critical of tourism and its impact on the island of O’ahu – Wai’anae Windward, and North Shore; as well as Maui and Moloka’i. Sentiment was stronger on Lāna’i.

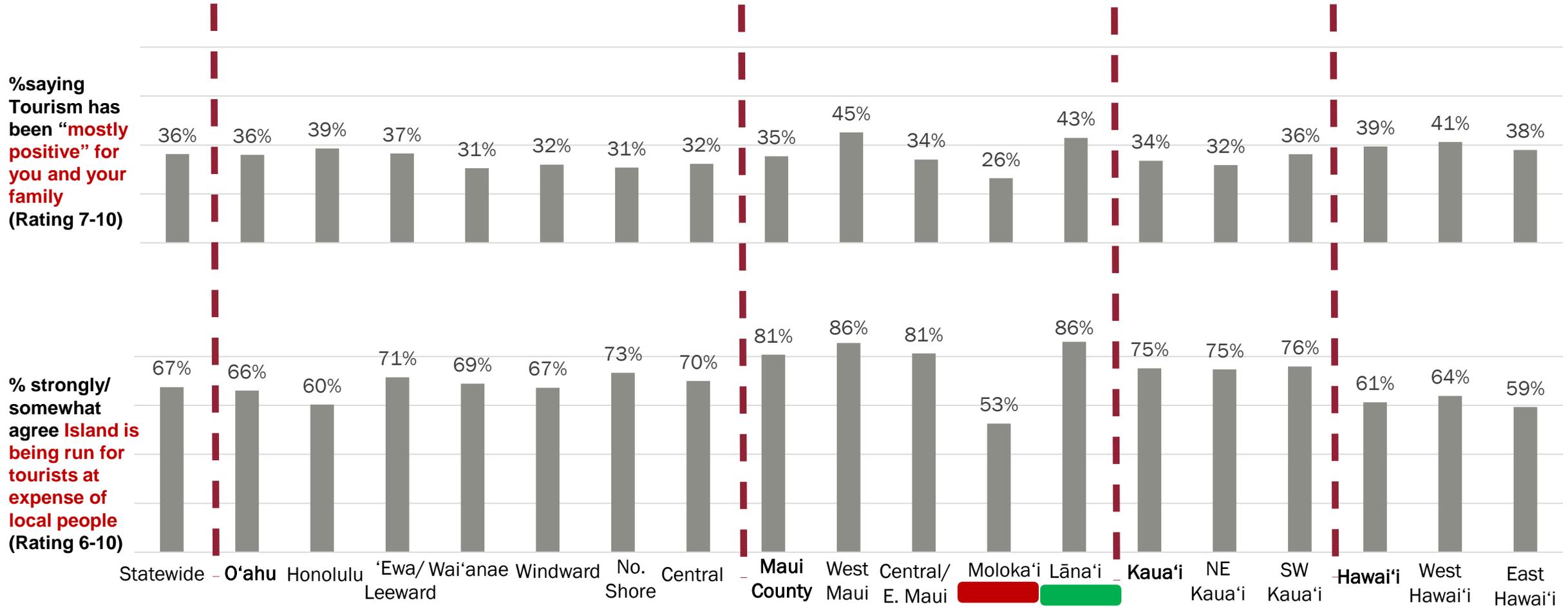


Q3. In 2019, visitors spent nearly \$18 billion in Hawai’i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

Q4. I’m going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary – Resident Sentiment by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on **Moloka'i** and notably less so on **Lāna'i**. Only 26 percent of Moloka'i residents say the industry is 'mostly positive' for themselves and their family.



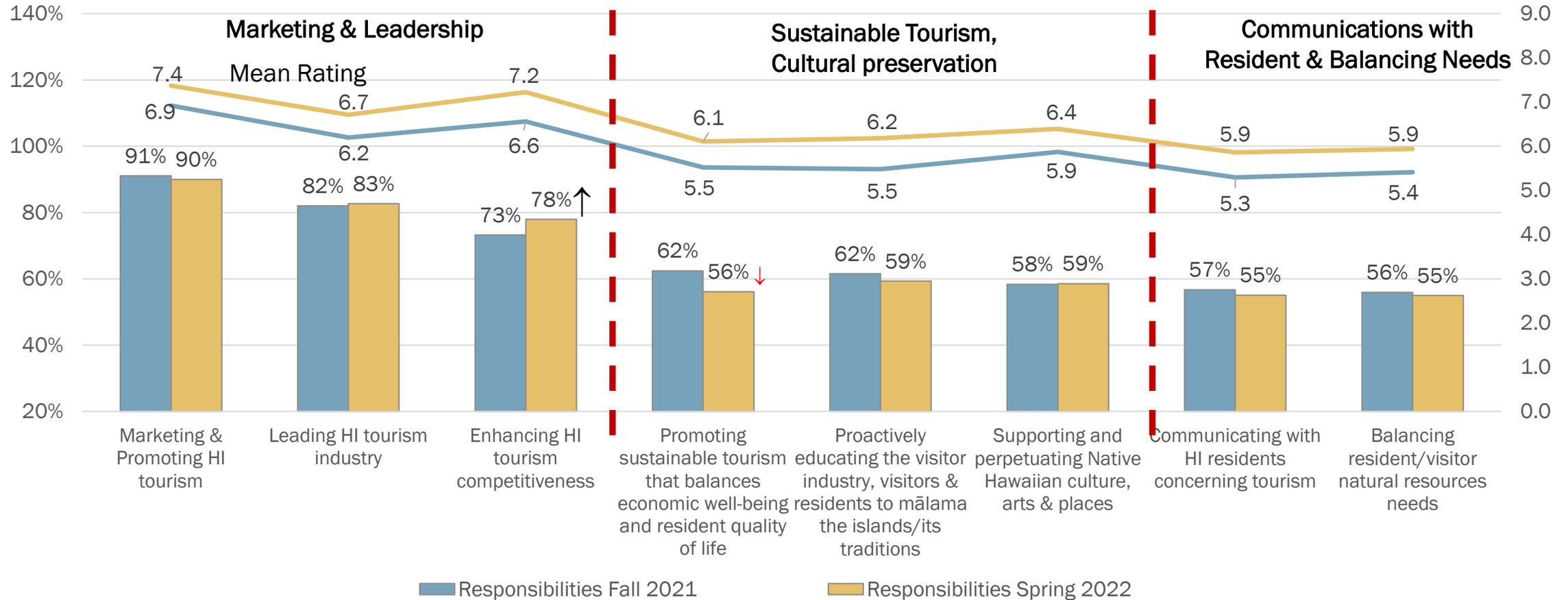
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

Executive Summary – Hawai‘i Tourism Authority Roles & Ratings (1)

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

While the Hawai‘i Tourism Authority first and foremost is known for its Marketing and tourism Leadership roles, residents have been made increasingly aware of its role in enhancing Hawai‘i’s competitiveness. Moreover, mean ratings on HTA’s performance have improved across all areas by half a mean point or more, a significant improvement from the previous period.

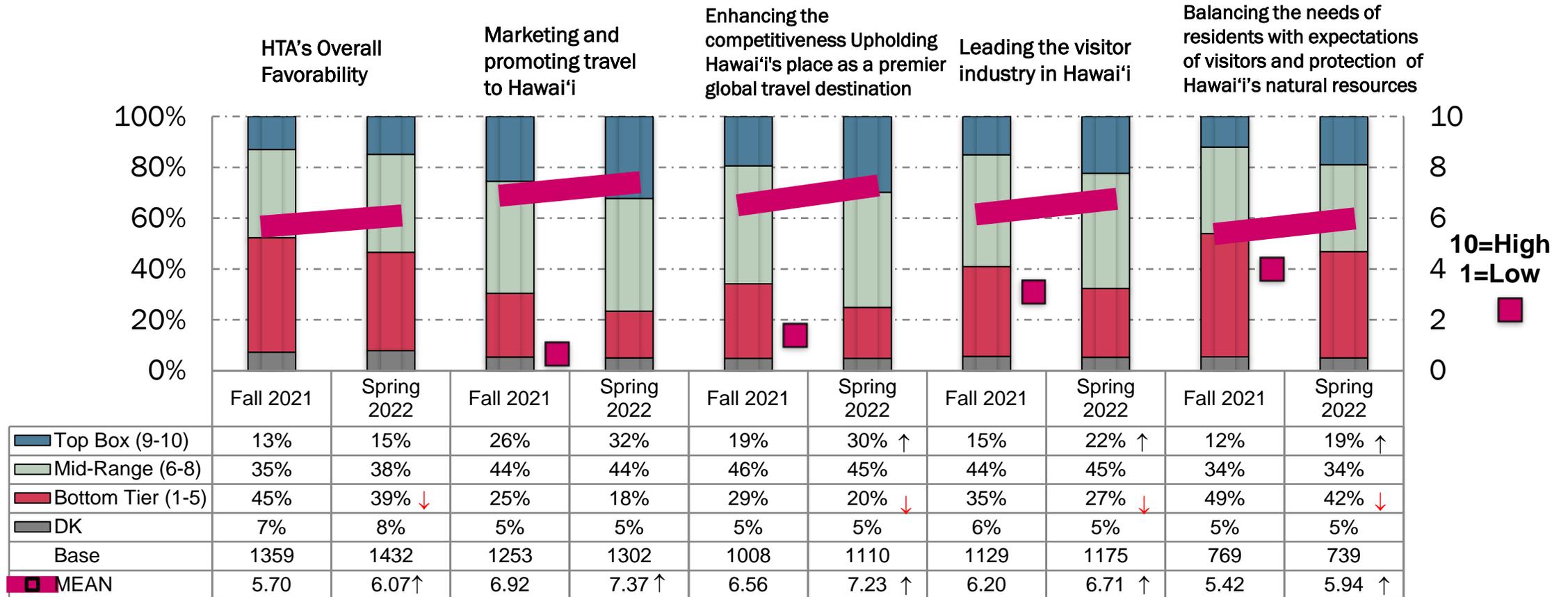


Q12a. Prior to doing this survey, were you aware that the Hawai‘i Tourism Authority is responsible for?

Q12b. Using a scale of 1 to 10 where 10 means you think the Hawai‘i Tourism Authority is doing an Excellent job and 1 means you think the Hawai‘i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?

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

Among those familiar with HTA’s role in the industry, perceptions recovered from dips in Fall ’21 and now exceed levels seen in Spring ’21 across all responsibility areas. These improvements were due to higher Top Box (9-10) scores, or strong support of HTA in these areas.

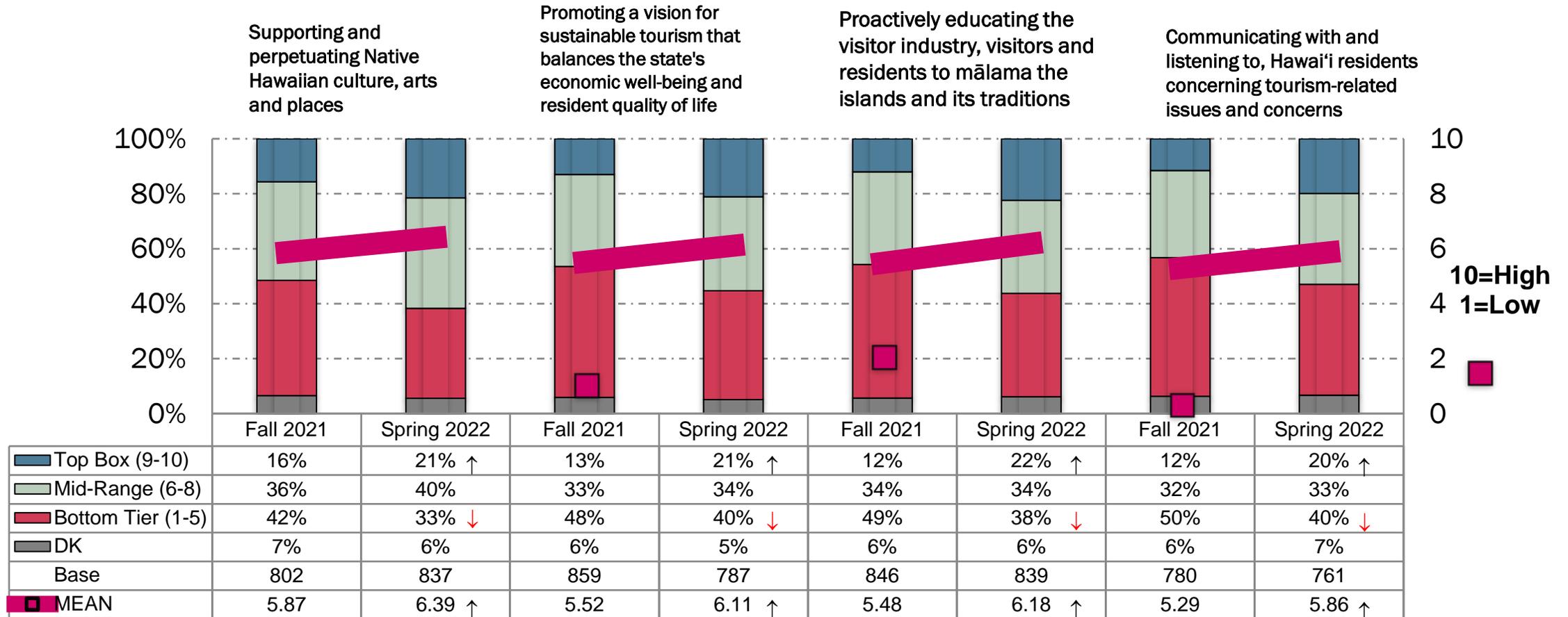


Q12. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai‘i Tourism Authority (HTA) overall

Q12b. In your opinion, how well has the Hawai‘i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai‘i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai‘i Tourism Authority (HTA) is doing in ...

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

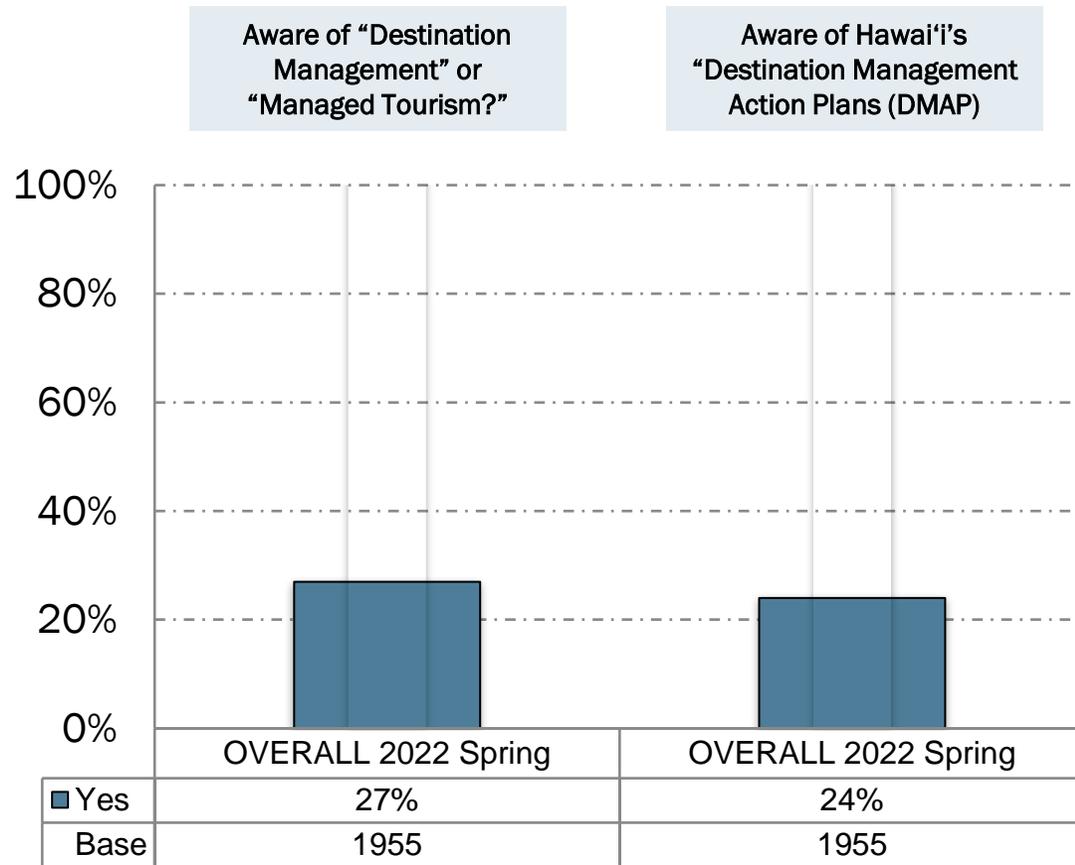
Public ratings of HTA’s work in cultural preservation, sustainability, education and resident communications also recovered in Spring’22, and residents are tilting positively towards the organization (6 out of 10 rating) instead of being neutral, a 5/10.



Q12b. In your opinion, how well has the Hawai‘i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai‘i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the Hawai‘i Tourism Authority (HTA) is doing in ...

Executive Summary – Awareness of Managed Tourism Plans

Approximately one-in-four residents are aware of Hawai‘i’s Destination Management Action Plans (DMAP), and this is similar to the 27 percent aware of the concept of destination management/managed tourism in general.



Awareness of DMAP, does impact tourism sentiment with those aware reporting higher sentiment, specifically that tourism is better managed and that more effort was being made to balance the industry’s economic benefits with quality of life.

Mean Score	Aware of DMAP	Unaware of DMAP
<i>Tourism has brought more benefits than problems</i>	6.1	5.9
<i>Perceived impact of tourism on you and your family</i>	6.5	6.6
<i>Tourism is being better managed on my island</i>	5.8	5.2
<i>Tourism should be actively encouraged on my Island</i>	6.0	6.1
<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.0	5.4
<i>My island is run for tourists at expense of local people</i>	6.9	6.9

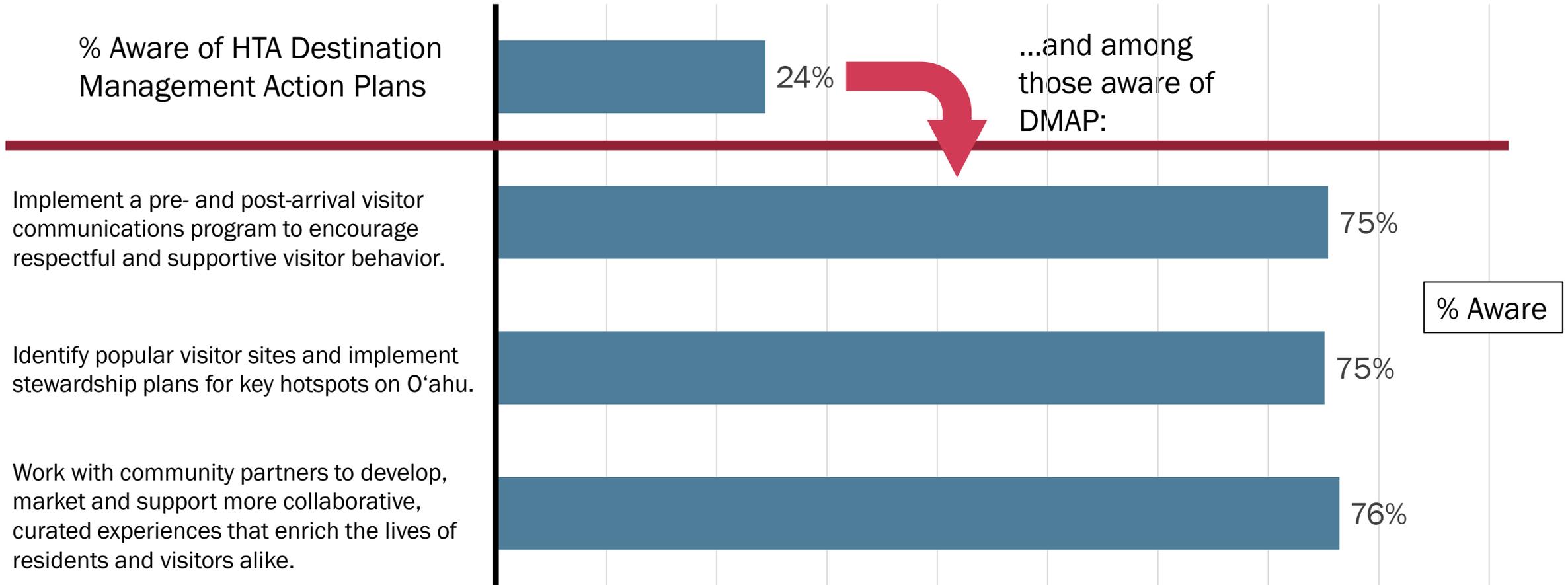
*Red font indicates questions where higher ratings are worse for Tourism sentiment.

Q9. Have you ever heard of “Destination Management” or “Managed Tourism?”

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

Destination Management Action Plans Awareness: O‘ahu

O‘ahu residents’ awareness of HTA Destination Management Action Plans is relatively low (24% aware), but those who are aware of the plans are largely aware of actions being undertaken as part of the plan.

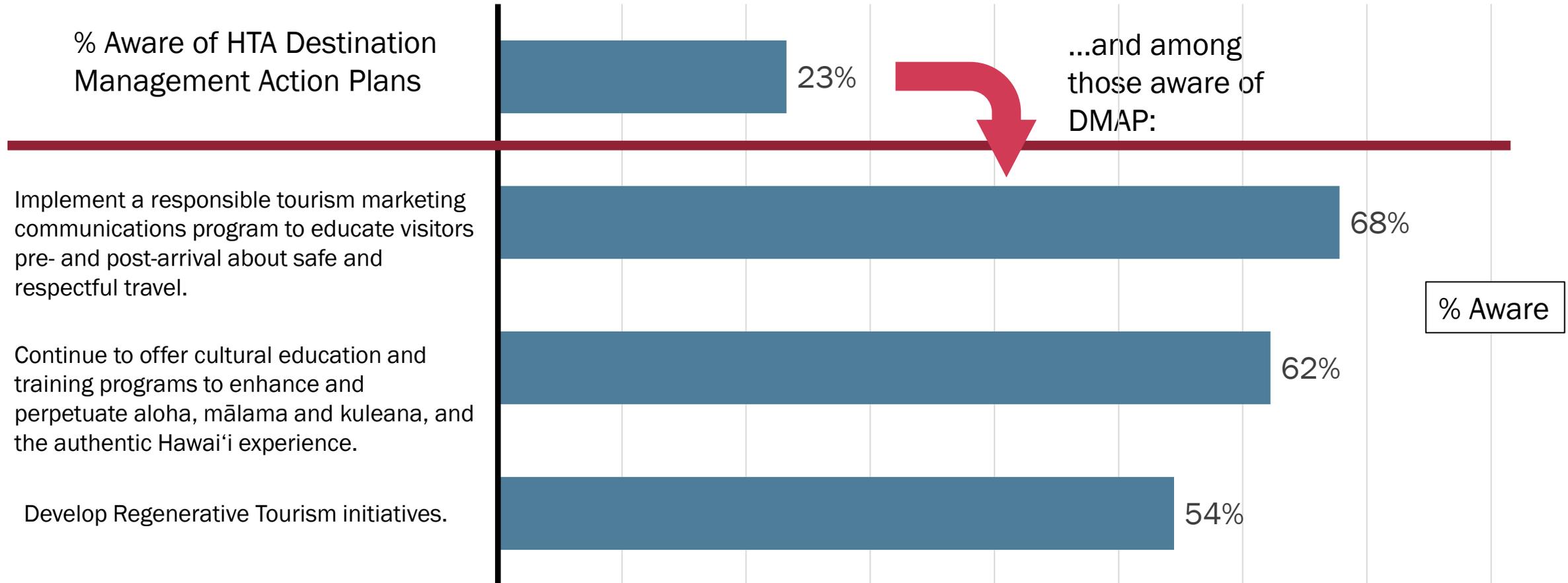


Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state? (Base: 838)

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

Destination Management Action Plans Awareness: Maui

Maui residents' awareness of HTA Destination Management Action Plans is relatively low (23% aware), but those who are aware of the plans are largely aware of actions being undertaken as part of the plan.

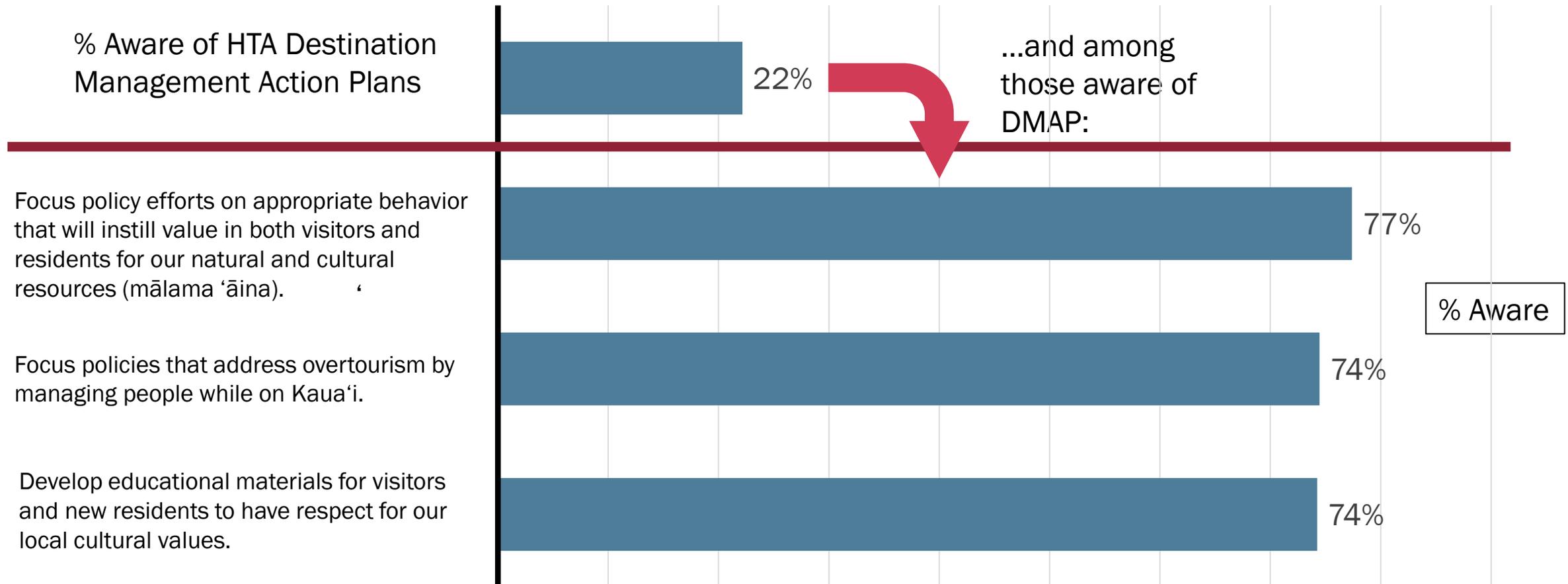


Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 403)

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

Destination Management Action Plans Awareness: Kaua'i

Kaua'i residents' awareness of HTA Destination Management Action Plans is relatively low (22% aware), but those who are aware of the plans are largely aware of actions being undertaken as part of the plan.

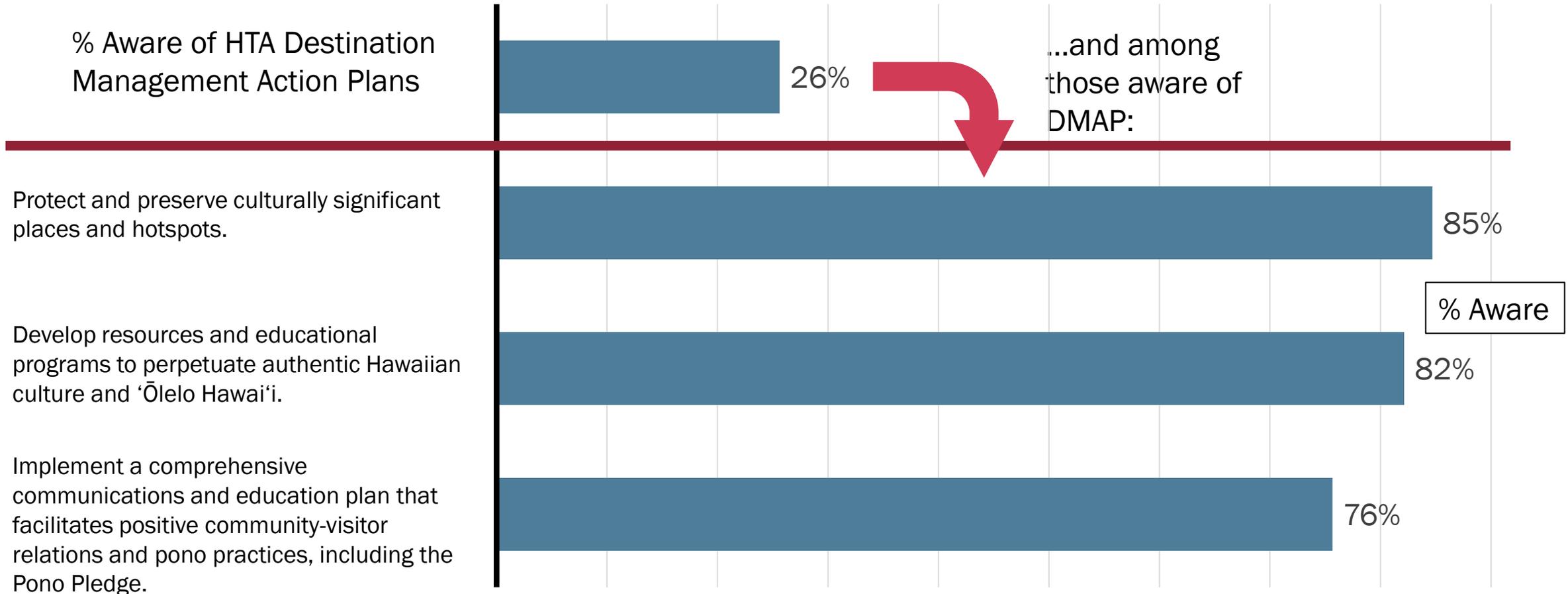


Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state? (Base: 255)

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: 48)

Destination Management Action Plans Awareness: Hawai'i Island

Hawai'i residents' awareness of HTA Destination Management Action Plans is relatively low (26% aware), but those who are aware of the plans are largely aware of actions being undertaken as part of the plan.



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: 458)

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: 105)

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:

- Improving Quality of Life (8%)
- Creating job opportunities (7%)
- Supporting other local industries (7%)
- Supporting local businesses (7%)
- Contributing to the perpetuation of Native Hawaiian language/culture (7%)

Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits (53%) Fall'21 47% Spring'21 56% Fall '20 35%	Is an industry that enhances residents' quality of life	8%
	Creates job opportunities for residents	7%
	Supports other industries like agriculture	7%
	Supports local businesses like retail, dining, etc.	7%
	Contributes to the perpetuation of Native Hawaiian culture and language	7%
	Sponsors festivals, activities & sports events for residents & visitors	5%
	Creates shopping, restaurants and entertainment opportunities for residents	5%
	Creates job opportunities with paths for advancement	5%
	Tourism in Hawai'i reminds me that we have a unique culture to share with visitors	2%
	Sustainability & Managed Tourism (25%) Fall'21 30%	More effort is being made to balance economic benefits of tourism and quality of life
Tourism should be actively encouraged on my island		5%
I have a voice in my island's tourism development decisions		5%
Tourism is being better managed on my island		5%
Helps fund the stewardship of Hawai'i's natural resources, parks and cultural sites		4%
Negative Impacts (9%) Fall'21 8% Spring'21 11% Fall'20 15%	My island's economy is too dependent on tourism	5%
	This island is being run for tourists at the expense of local people	4%
Accommodation & Access Fees (8%) Fall'21 10% Spring '21 2%	Stop approval of additional legal vacation rentals on my island	3%
	Eliminate illegal vacation rentals on my island	3%
	Do not allow building of additional hotel/condo/timeshare units on my island	1%
	Charge visitors fees to access public parks and trails	1%
Visitor Education (3%) Fall'21 1%	Educate visitors and residents to mālama the islands and each other	1%
	Visitors need to be educated about protecting Hawaii's natural environment and cultural resources	1%
	Authentic presentation of Native Hawaiian language and culture is important	1%
Giving Back & Resident only access (2%) Fall'21 <1% Spring'21 <1%	Encourage visitors to volunteer and give back during their visits to Hawaii	1%
	Designate resident-only days of the week at some state parks, beaches and trails	1%

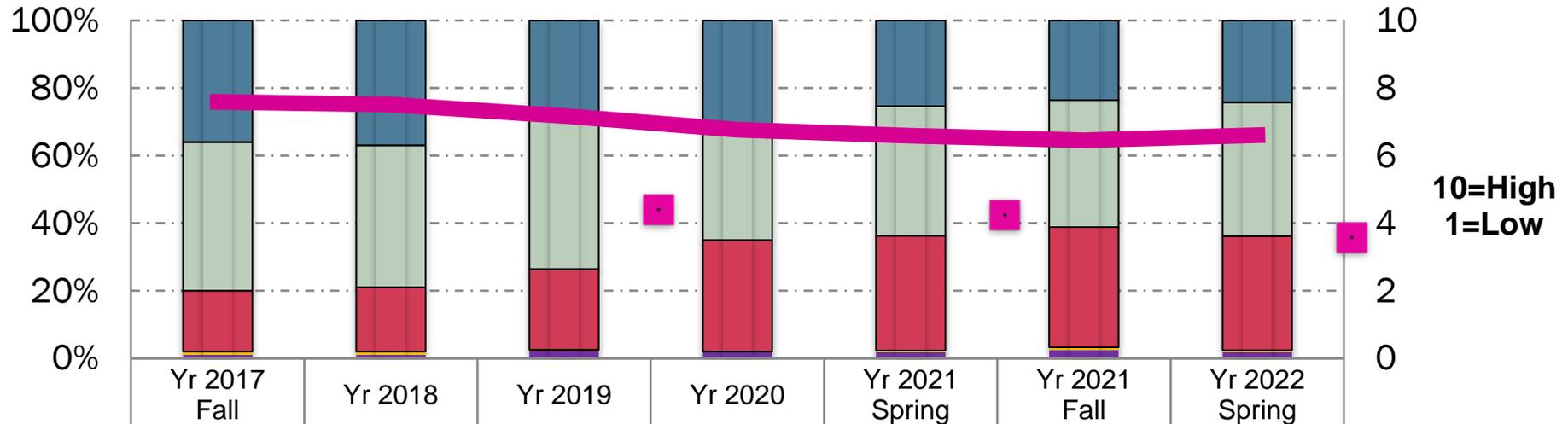


Detailed Findings



Impact of the Visitor Industry

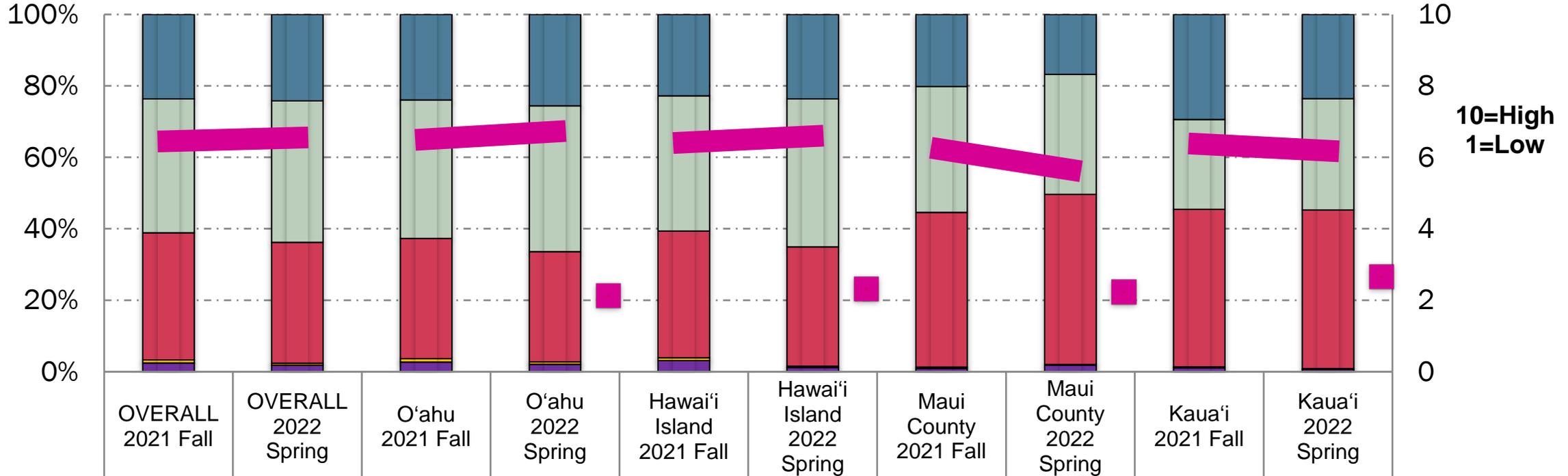
Impact of Tourism on the State - *Overall*



	Yr 2017 Fall	Yr 2018	Yr 2019	Yr 2020	Yr 2021 Spring	Yr 2021 Fall	Yr 2022 Spring
Top Box (9-10)	36%	37%	29% ↓	31%	25% ↓	24%	24%
Mid-Range (6-8)	44%	42%	45%	34% ↓	38%	38%	40%
Bottom Tier (1-5)	18%	19%	24% ↑	33% ↑	34%	36%	34%
No Impact	1%	1%	0%	0%	0%	1%	1%
DK/Rf	1%	1%	2%	2%	2%	2%	2%
Base	1,614	1,635	1,707	1,709	1,779	2007	1955
MEAN	7.59	7.51	7.17 ↓	6.76 ↓	6.59	6.45	6.60

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

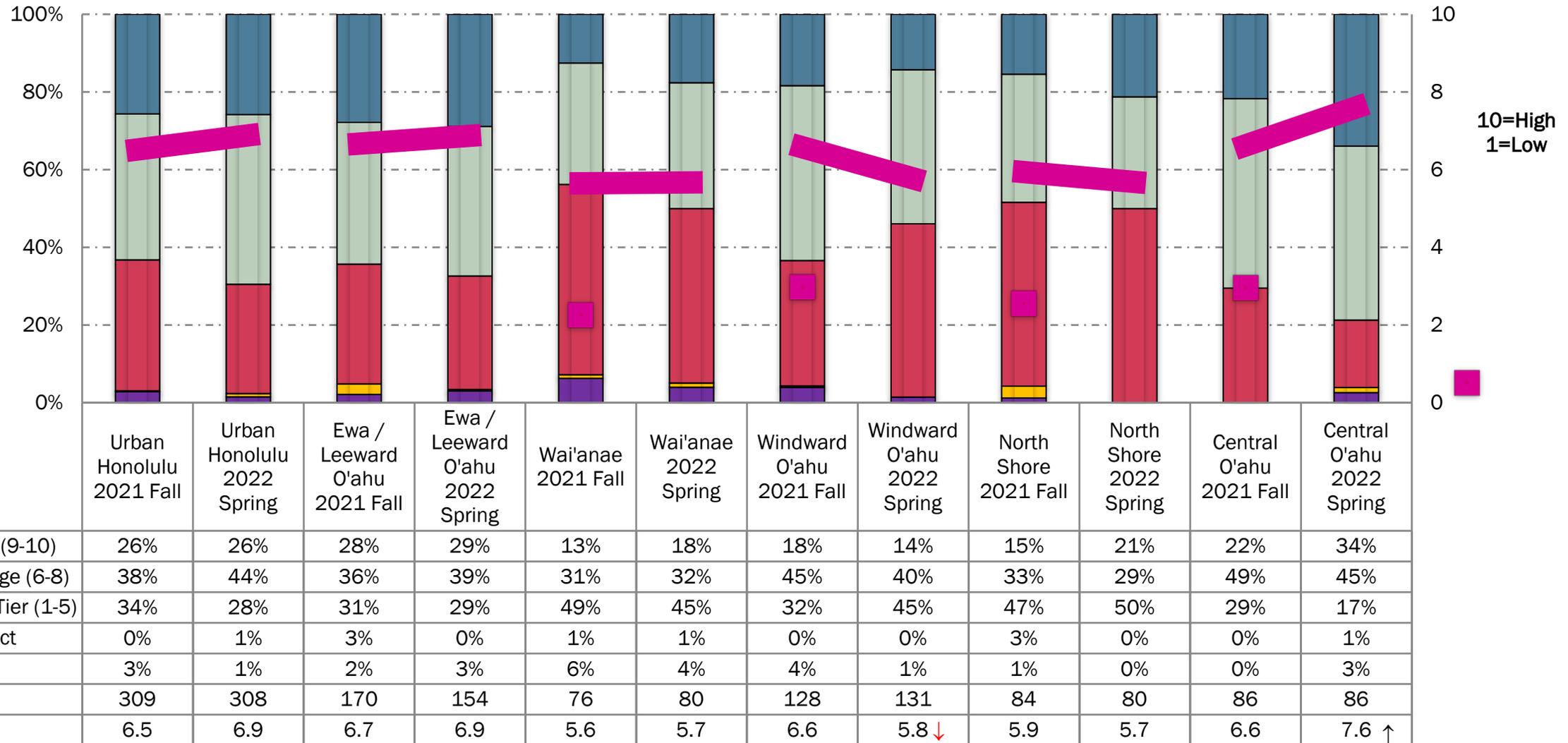
Impact of Tourism on the State – *By Island*



Top Box (9-10)	24%	24%	24%	26%	23%	24%	20%	17%	29%	24%
Mid-Range (6-8)	38%	40%	39%	41%	38%	41%	35%	34%	25%	31%
Bottom Tier (1-5)	36%	34%	34%	31%	35%	33%	43%	48%	44%	44%
No Impact	1%	1%	1%	1%	1%	0%	0%	0%	0%	0%
DK/Rf	2%	2%	3%	2%	3%	1%	1%	2%	1%	1%
Base	2007	1955	853	839	458	458	419	403	277	255
MEAN	6.45	6.55	6.51	6.72	6.42	6.59	6.22	5.66	6.37	6.18

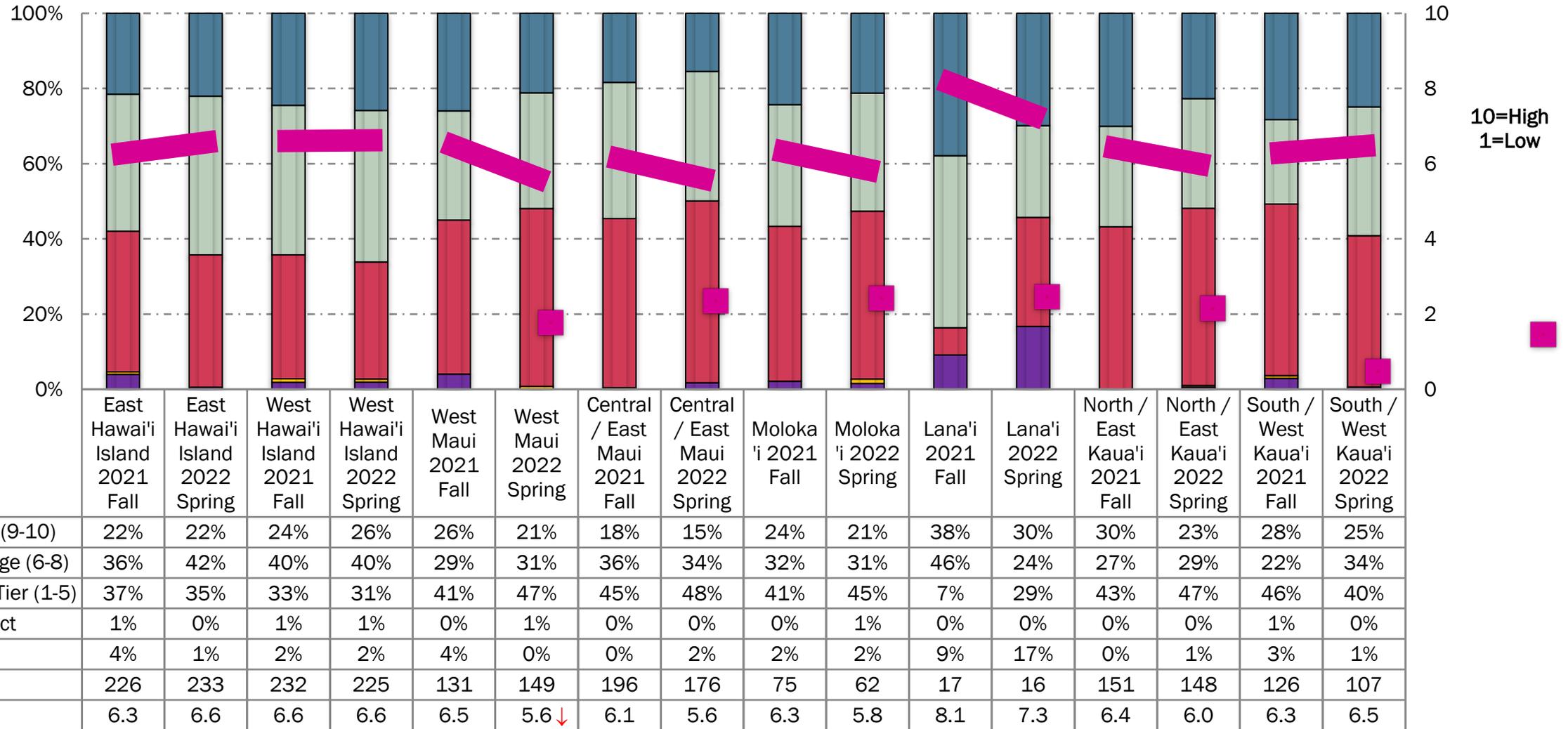
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



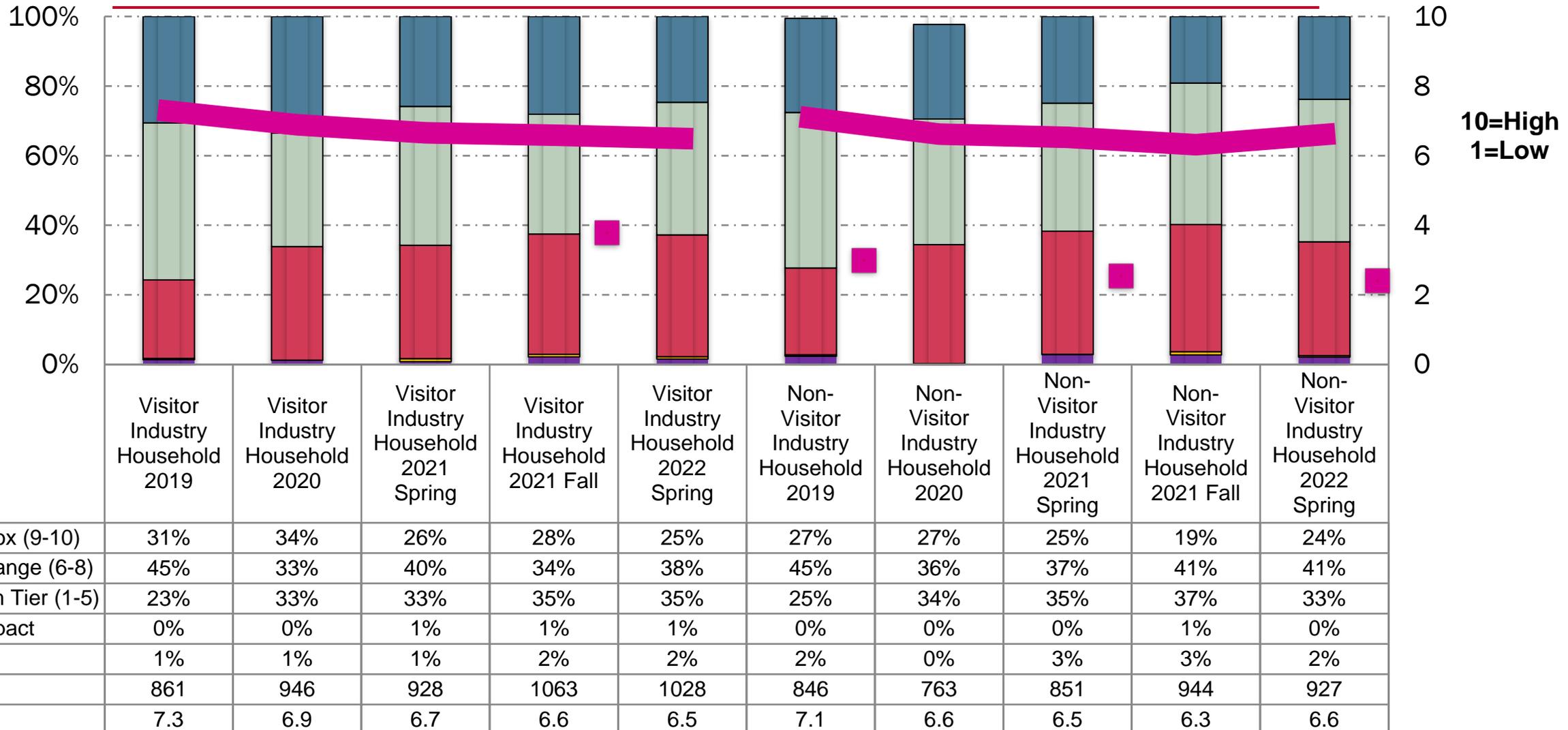
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



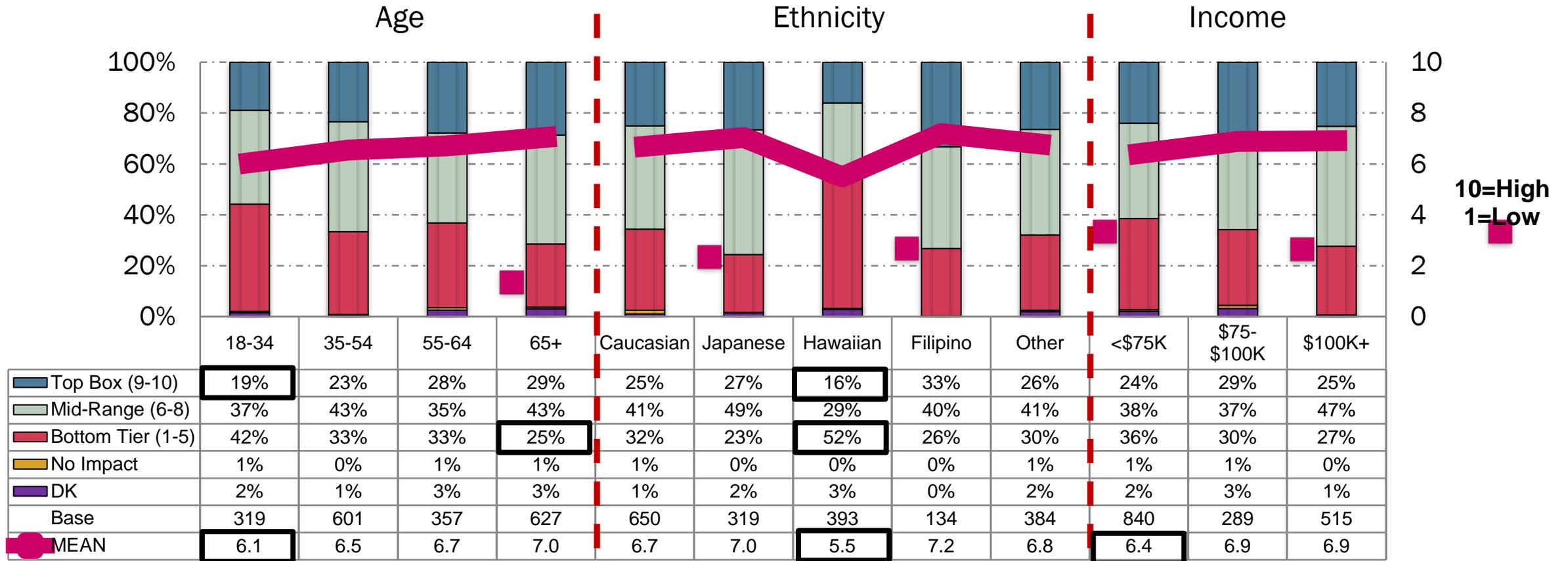
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

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



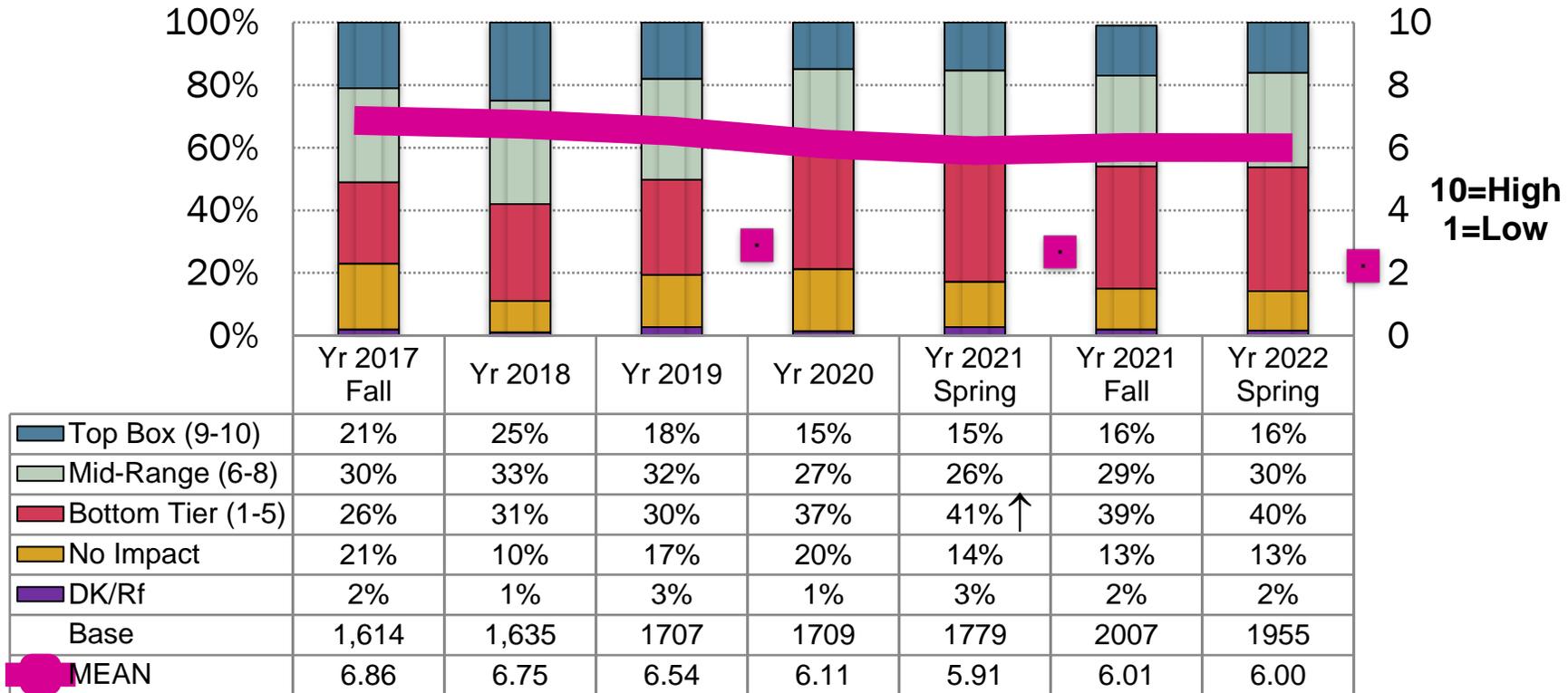
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



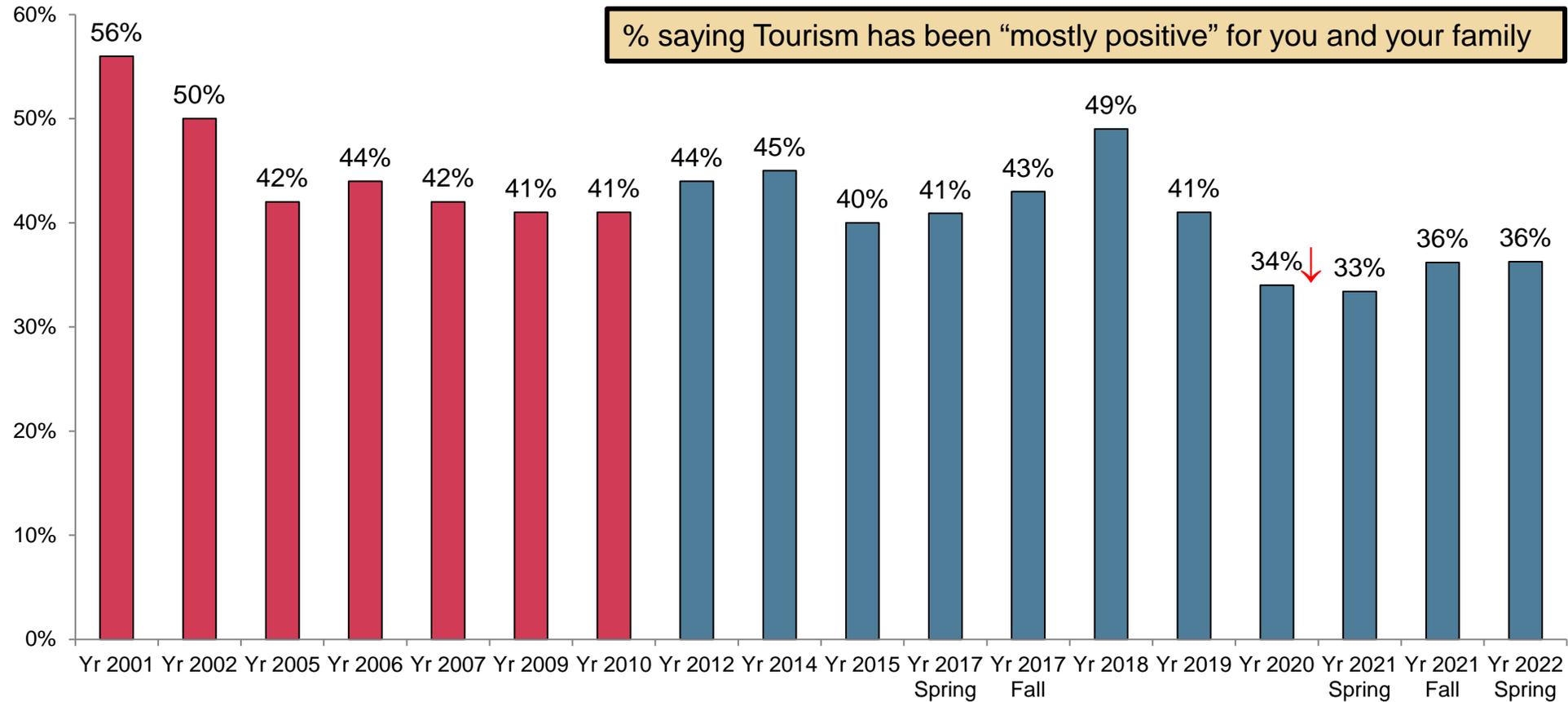
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...the state as a whole? If tourism has no impact, please just tell me.

Impact of Tourism on You & Your Family – *Overall (1)*



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?

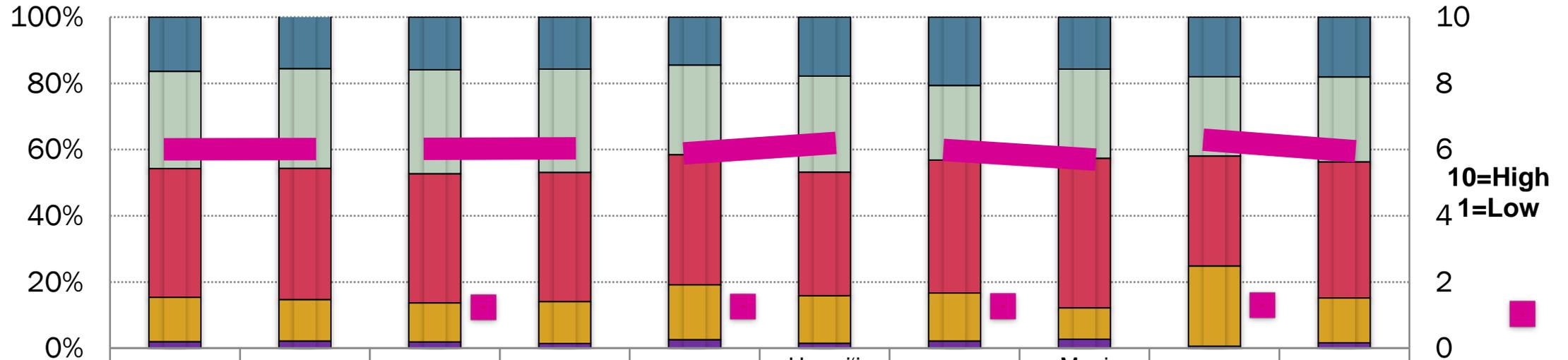
Impact of Tourism on You & Your Family – *Overall (2)*



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

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

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



	OVERALL 2021 Fall	OVERALL 2022 Spring	O'ahu 2021 Fall	O'ahu 2022 Spring	Hawai'i Island 2021 Fall	Hawai'i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua'i 2021 Fall	Kaua'i 2022 Spring
Top Box (9-10)	16%	16%	16%	16%	14%	18%	21%	16%	18%	18%
Mid-Range (6-8)	29%	30%	31%	31%	27%	29%	22%	27%	24%	26%
Bottom Tier (1-5)	39%	40%	39%	39%	39%	37%	40%	45%	33%	41%
No Impact	13%	13%	12%	13%	17%	14%	15%	9%	24%	14%
DK/Rf	2%	2%	2%	1%	3%	1%	2%	3%	1%	2%
Base	2007	1955	853	839	458	458	419	403	277	255
MEAN	6.01	6.02	6.02	6.04	5.91	6.18	5.97	5.72	6.27	5.97

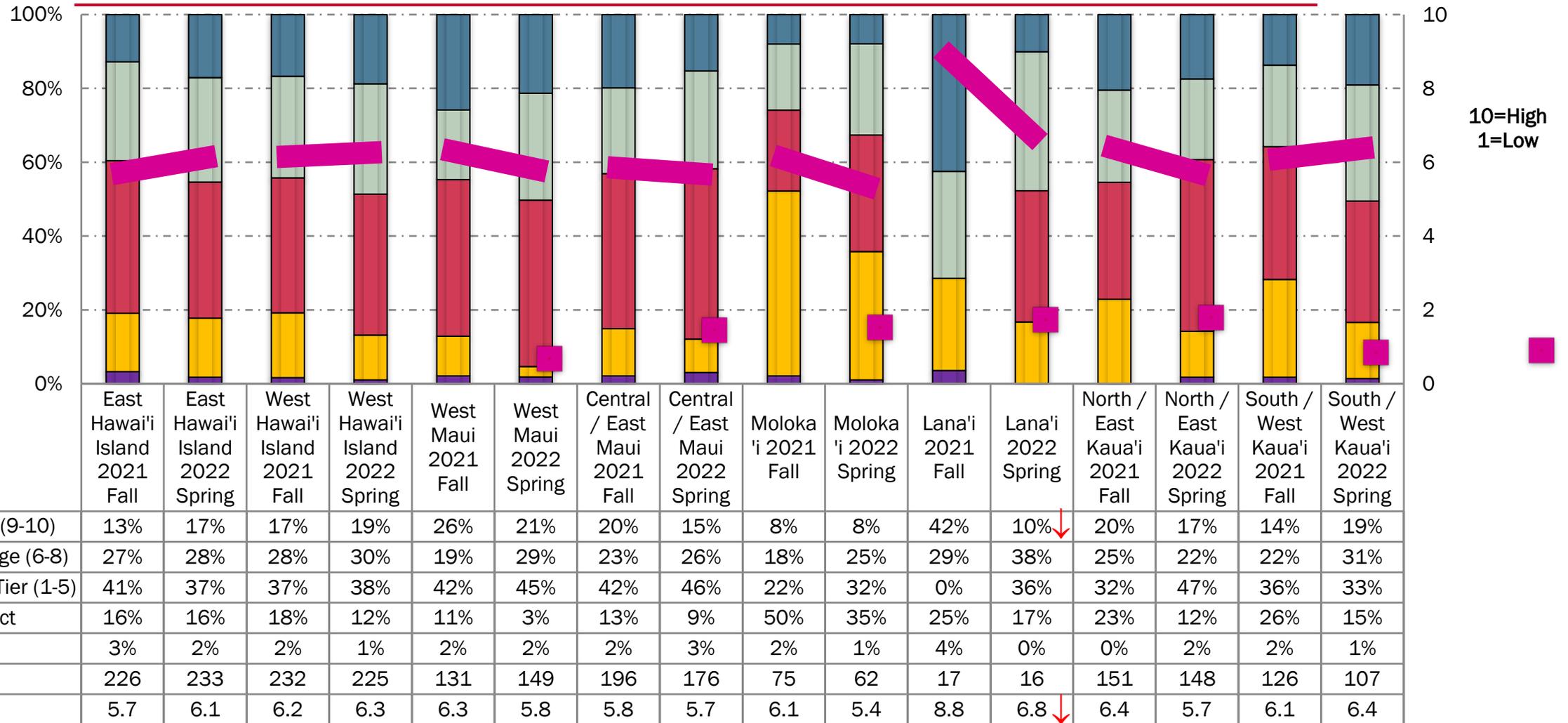
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



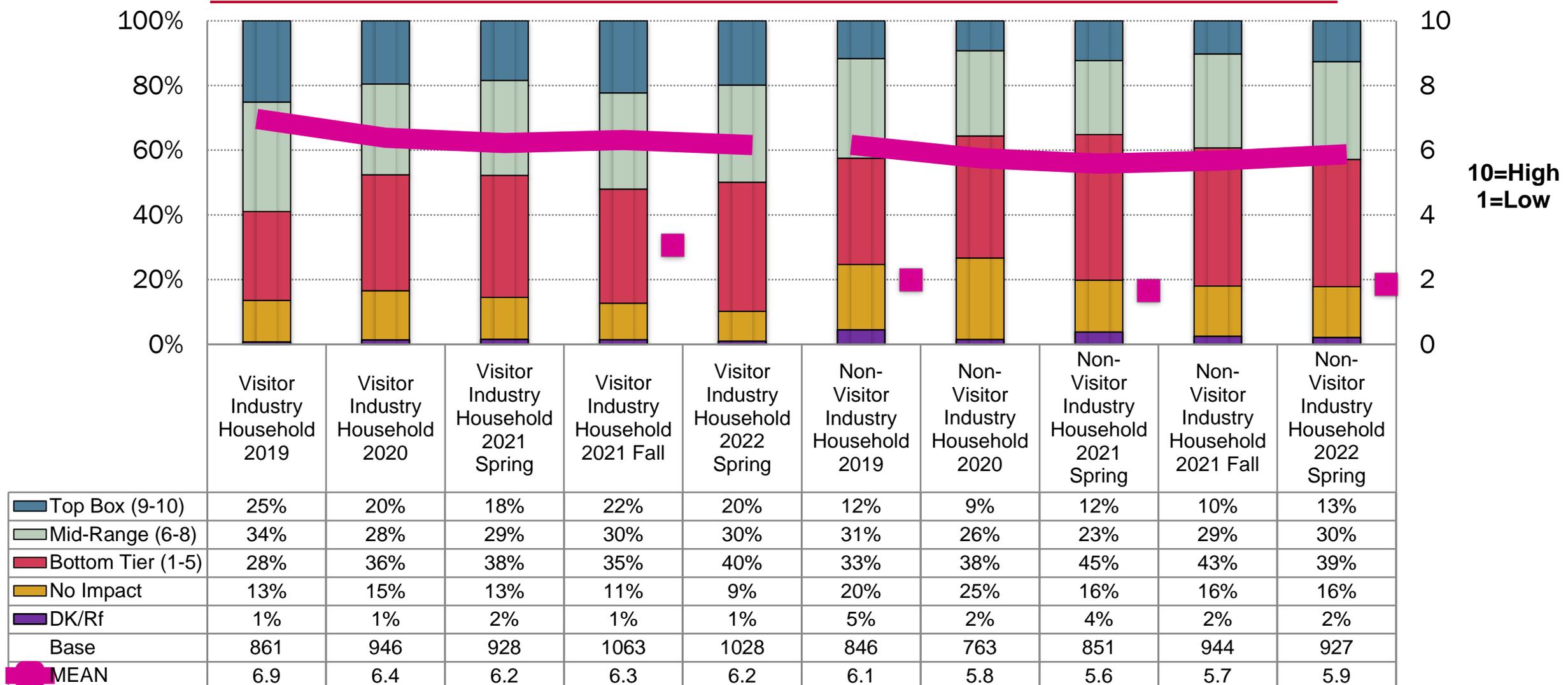
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



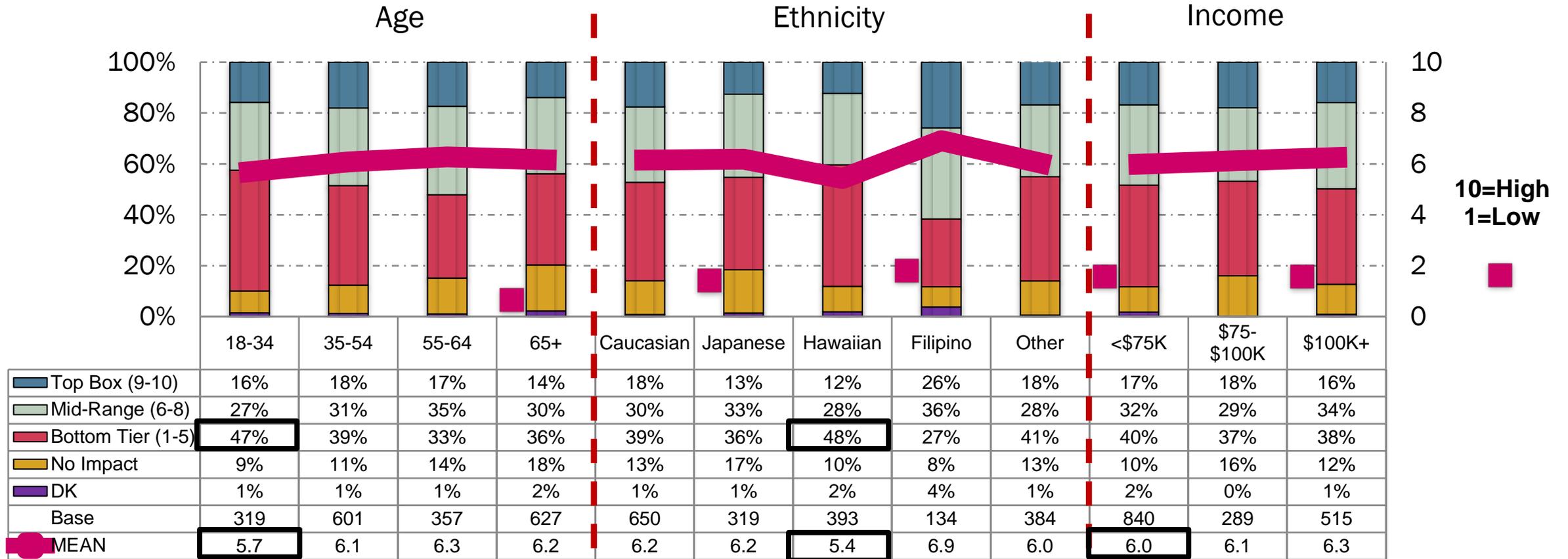
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

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



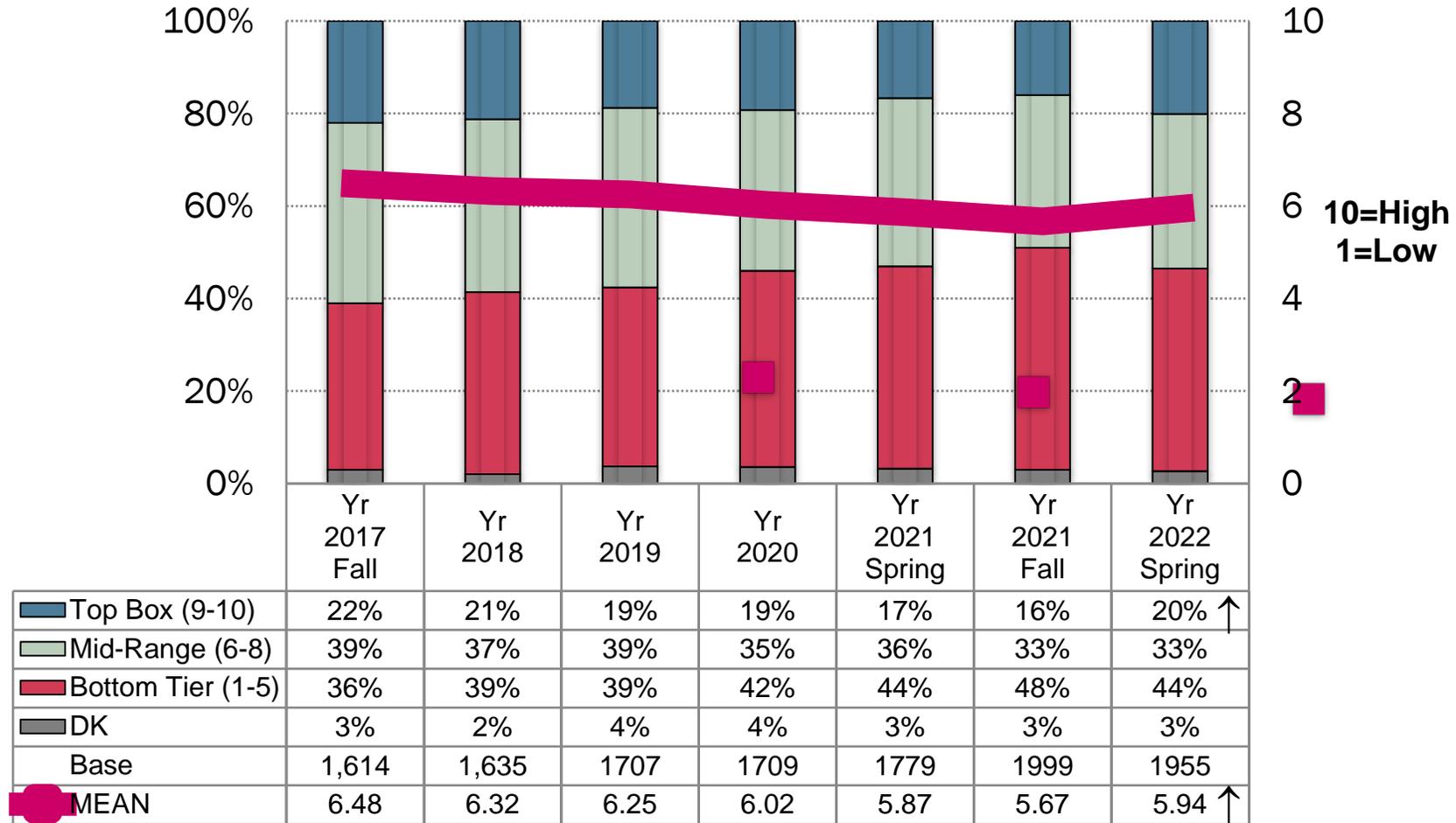
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



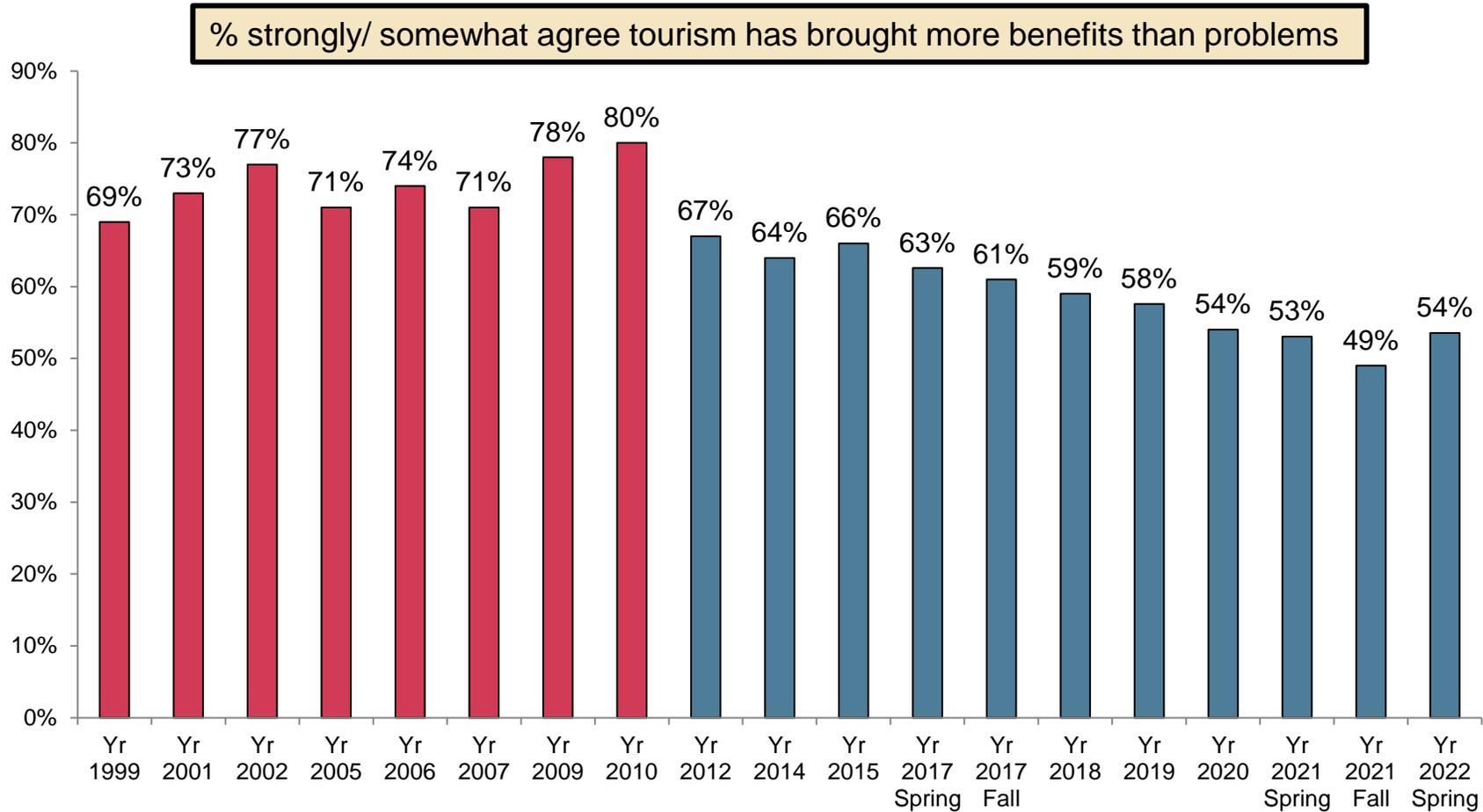
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative how would you rate the overall impact tourism has on...you and your family? If tourism has no impact, please just tell me.

“Tourism has brought more benefits than problems” – *Overall (1)*



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...?

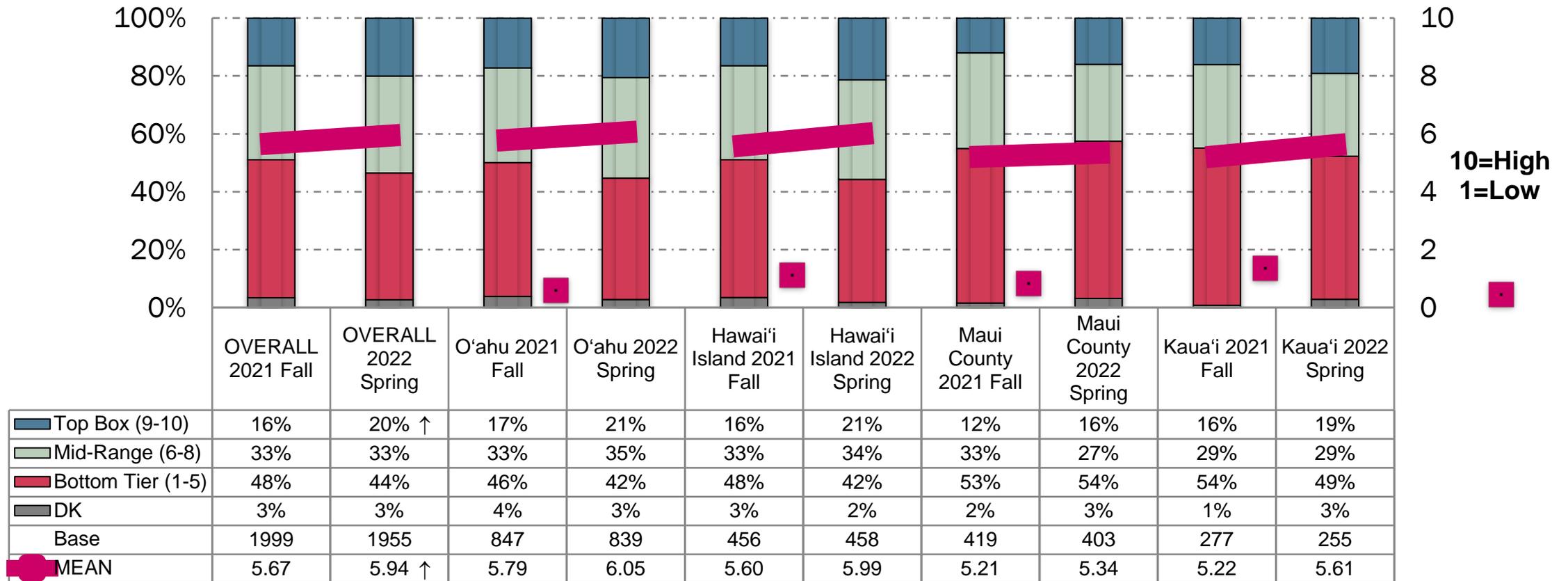
“Tourism has brought more benefits than problems” – *Overall (2)*



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

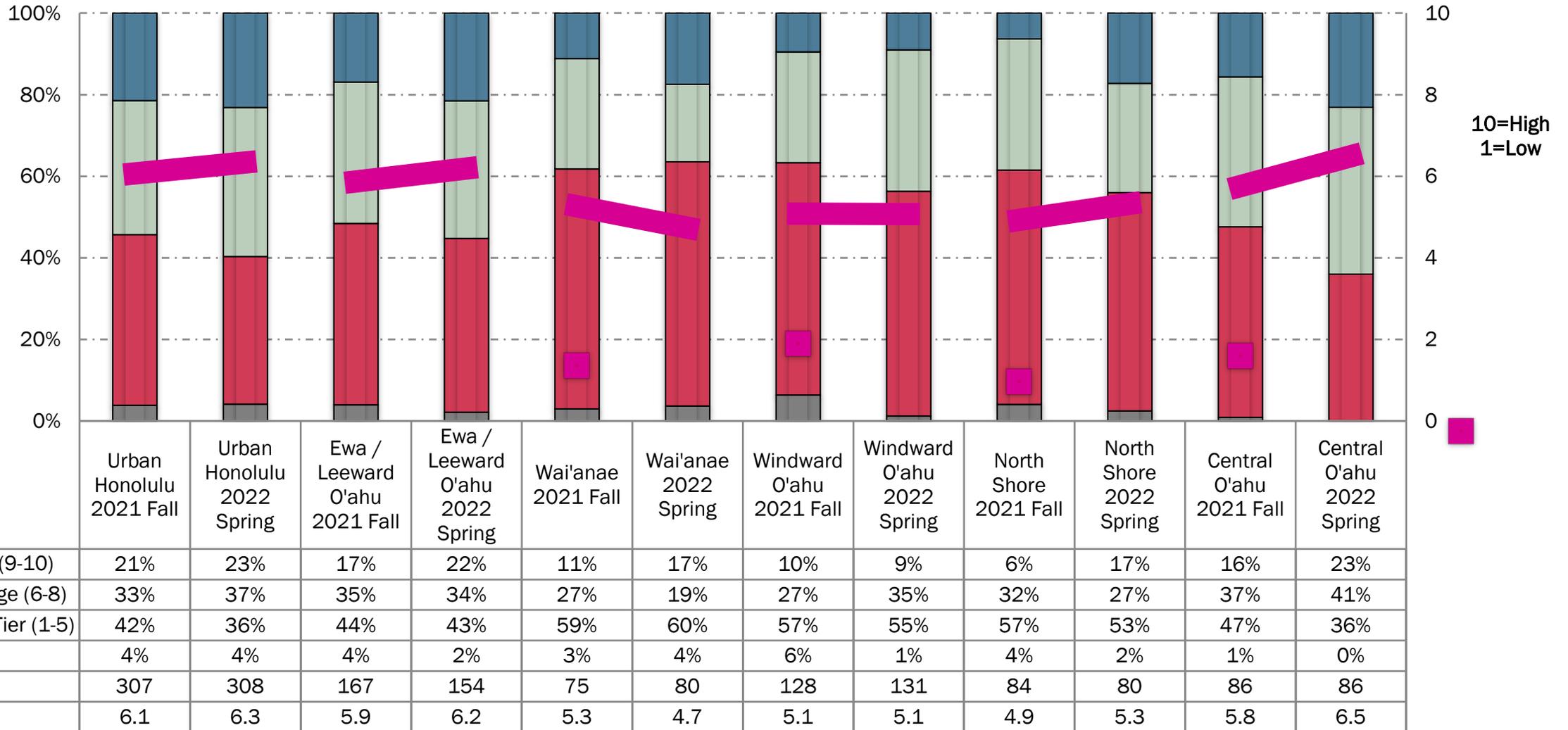
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



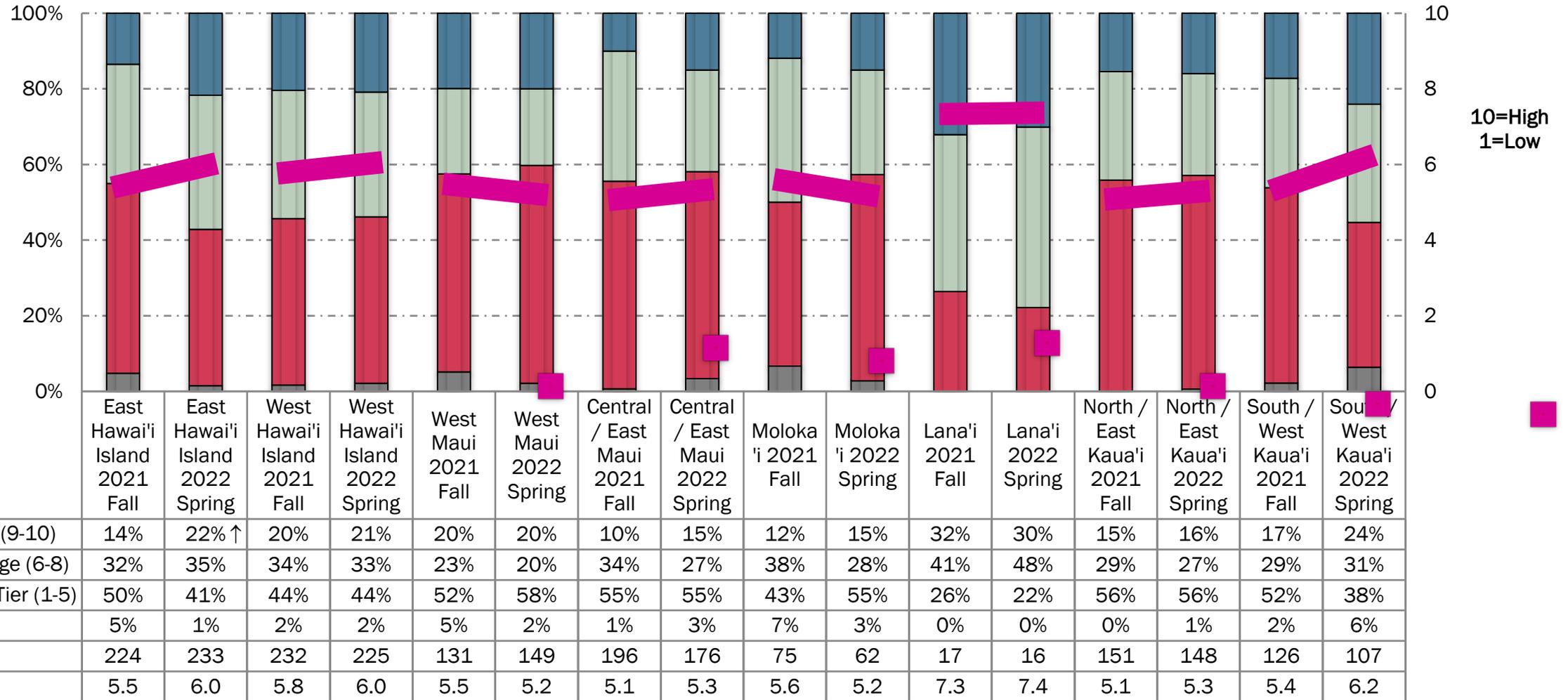
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



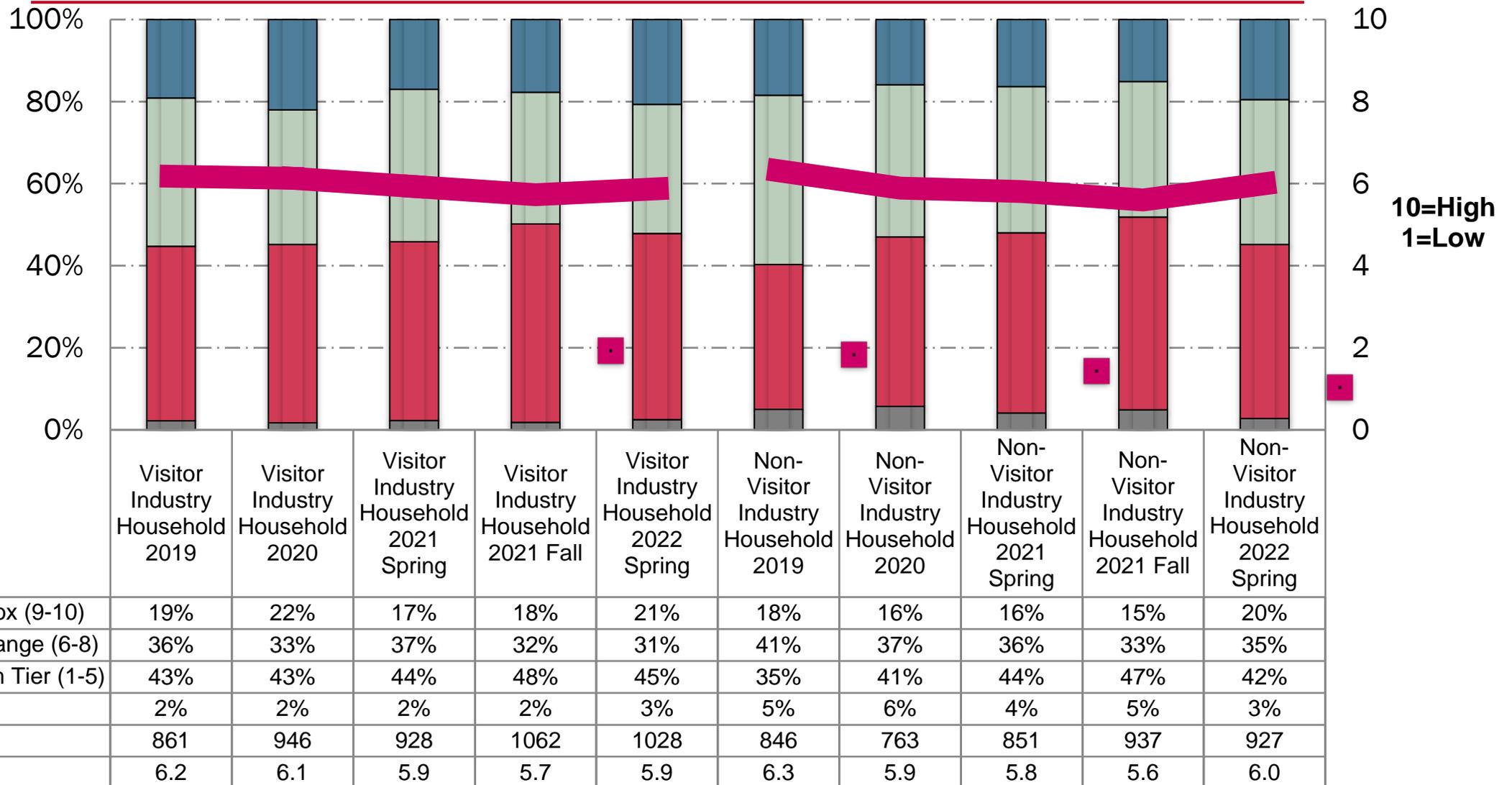
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



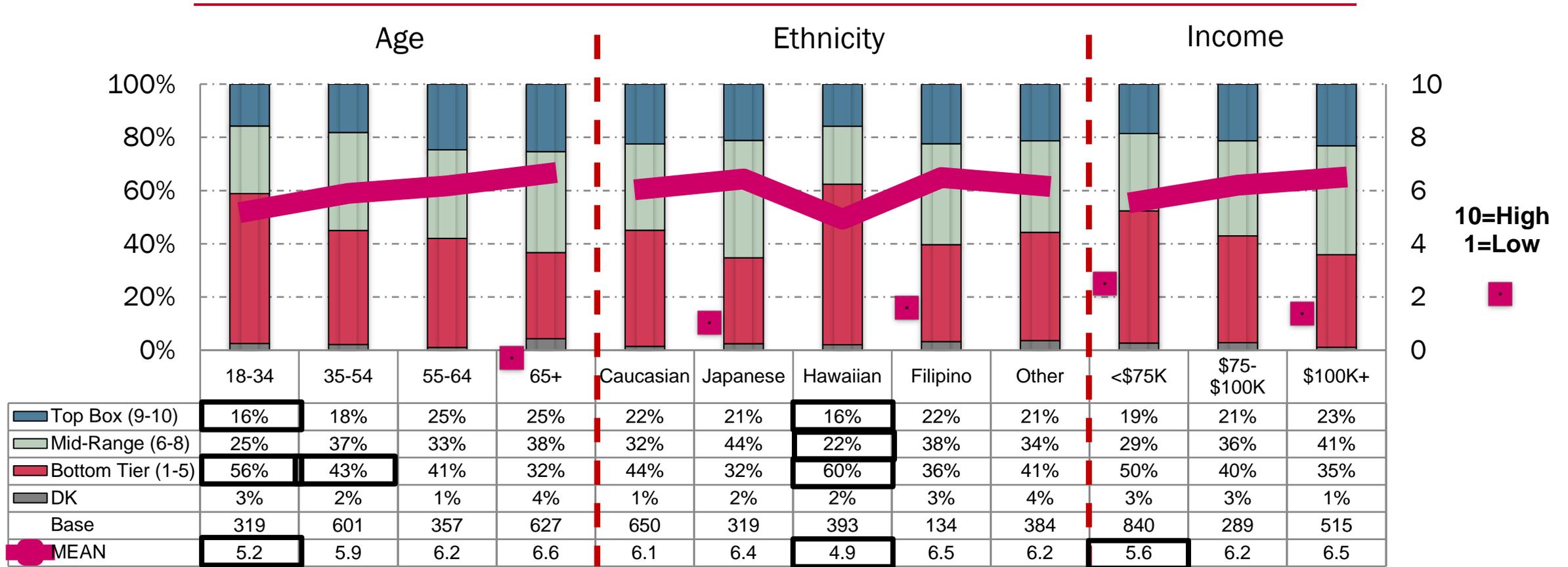
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

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



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

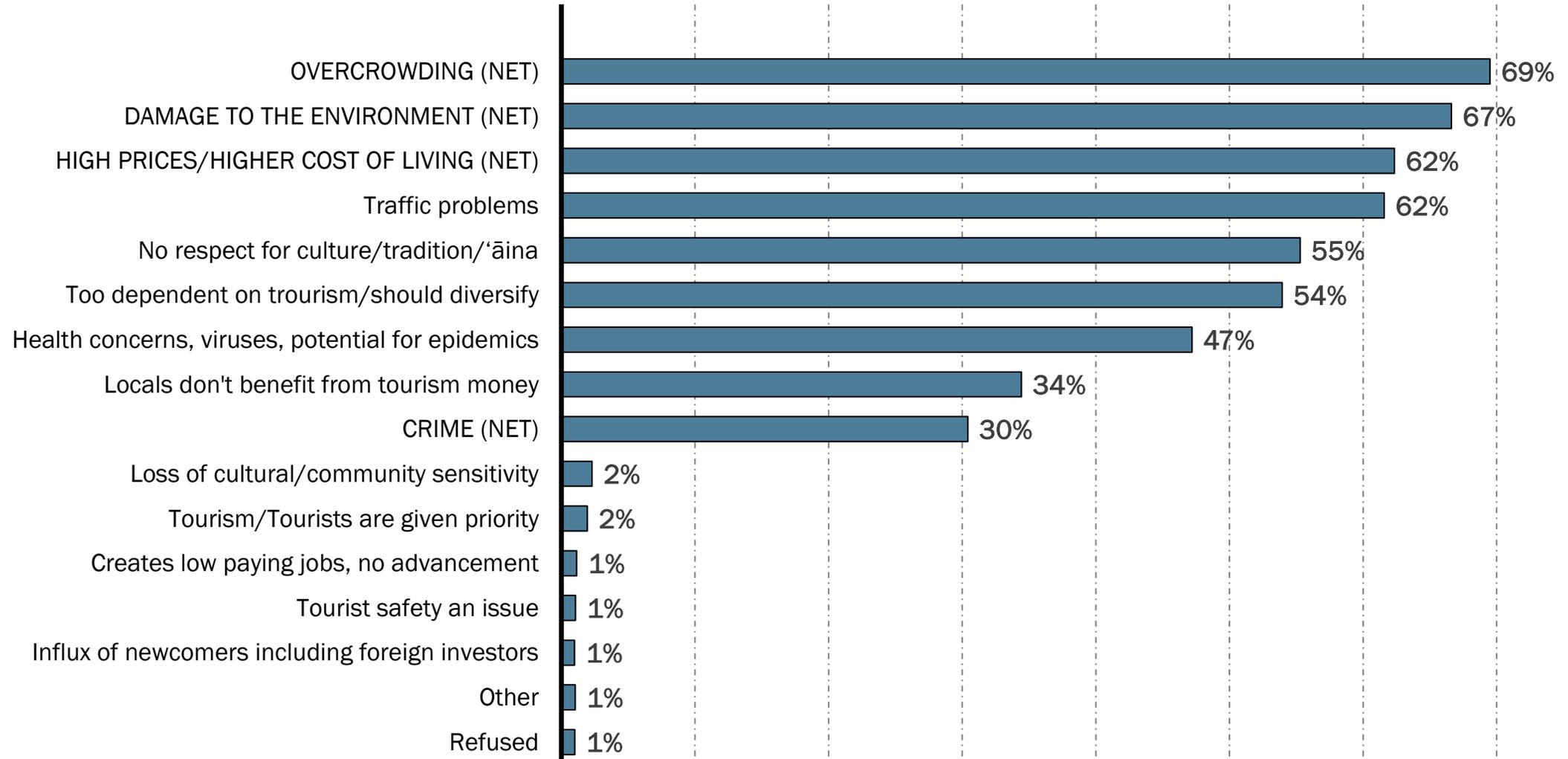
“Tourism has brought more benefits than problems” – *By Demographics*



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

Problems Created by Tourism in Hawai'i (Spring 2022 only)

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

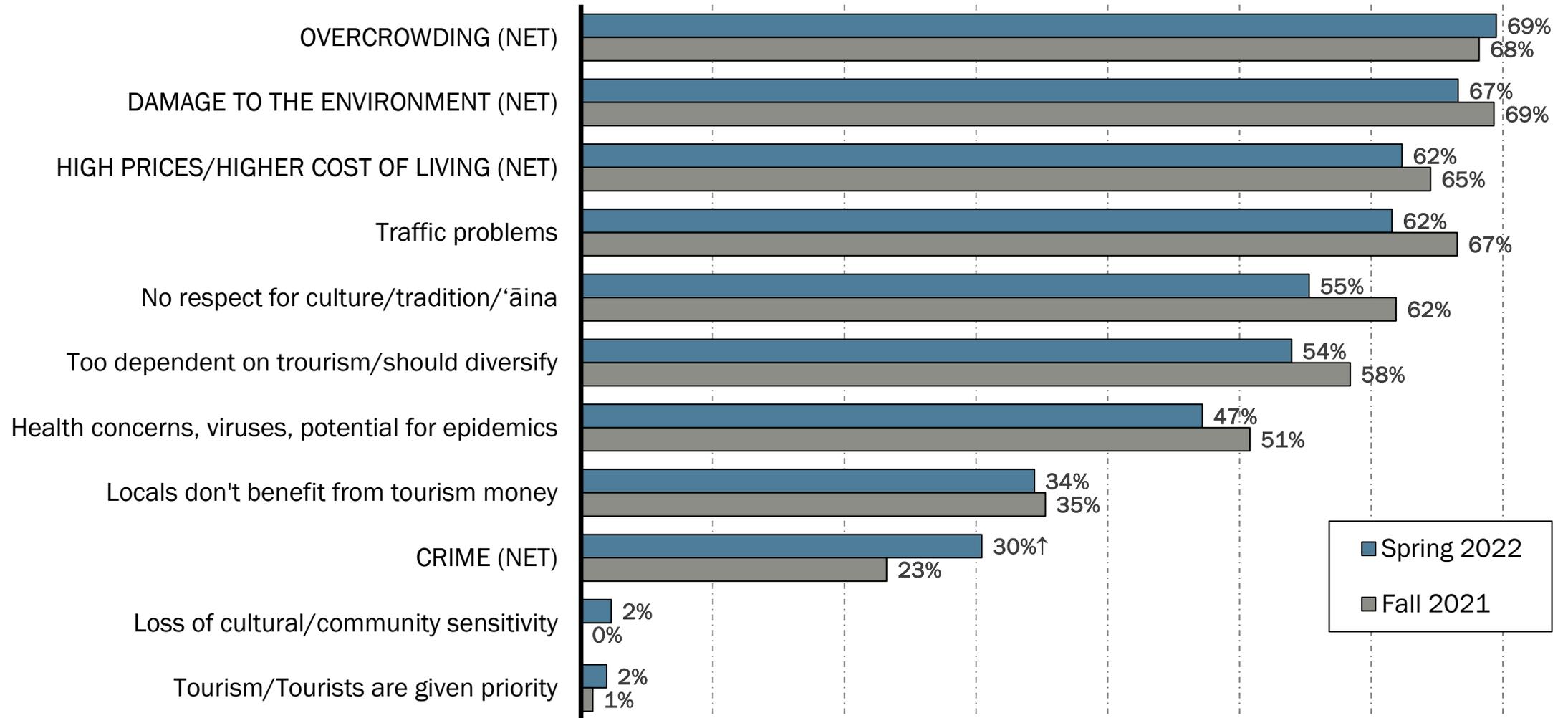


Base: 856

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

Problems Created by Tourism in Hawai'i (Trends Fall 2021 & Spring 2022)

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

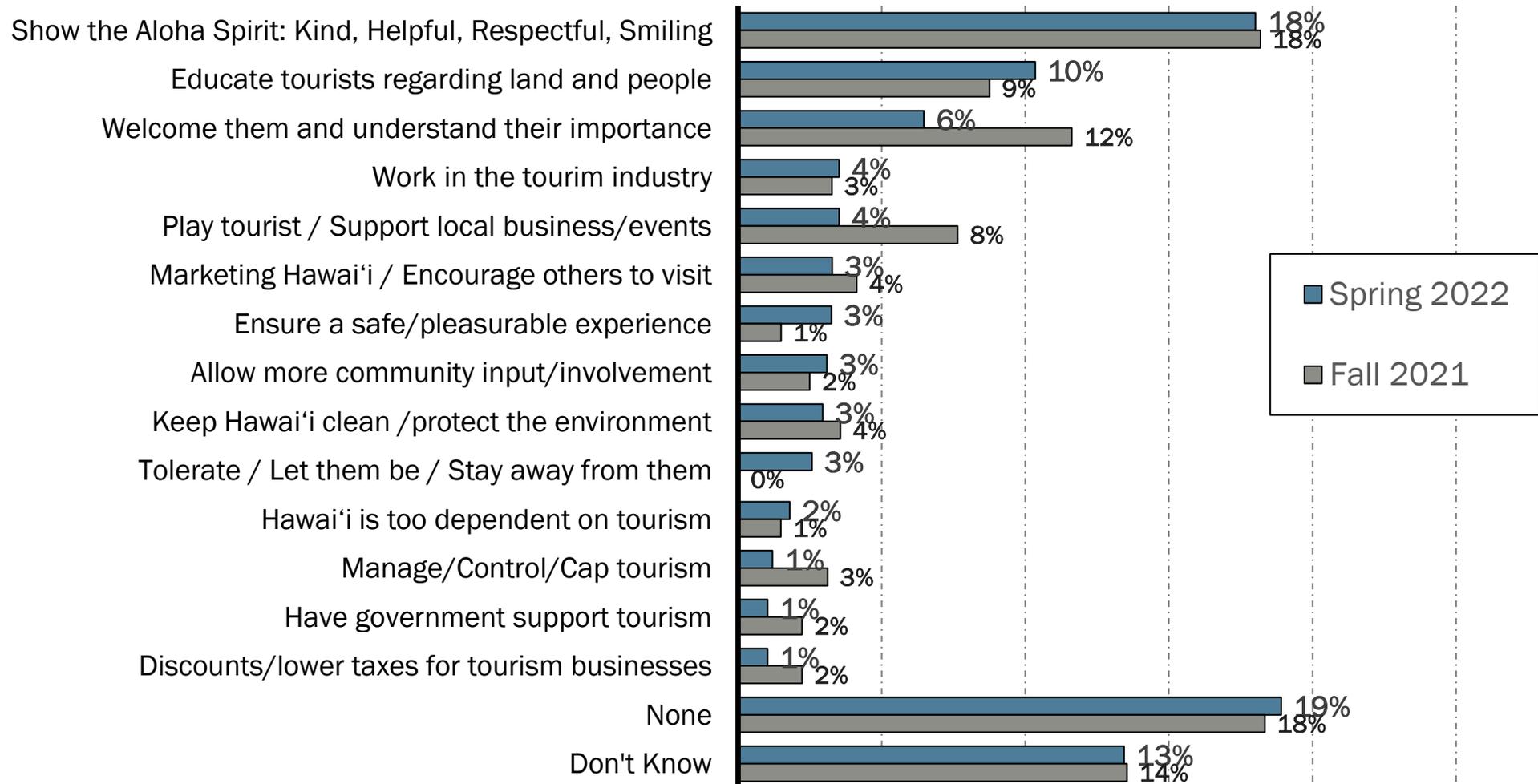


Base: Spring 2022 (856), Fall 2021 (973)

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

Ways Residents can Support Tourism in Hawai'i (Fall 2021 & Spring 2022)

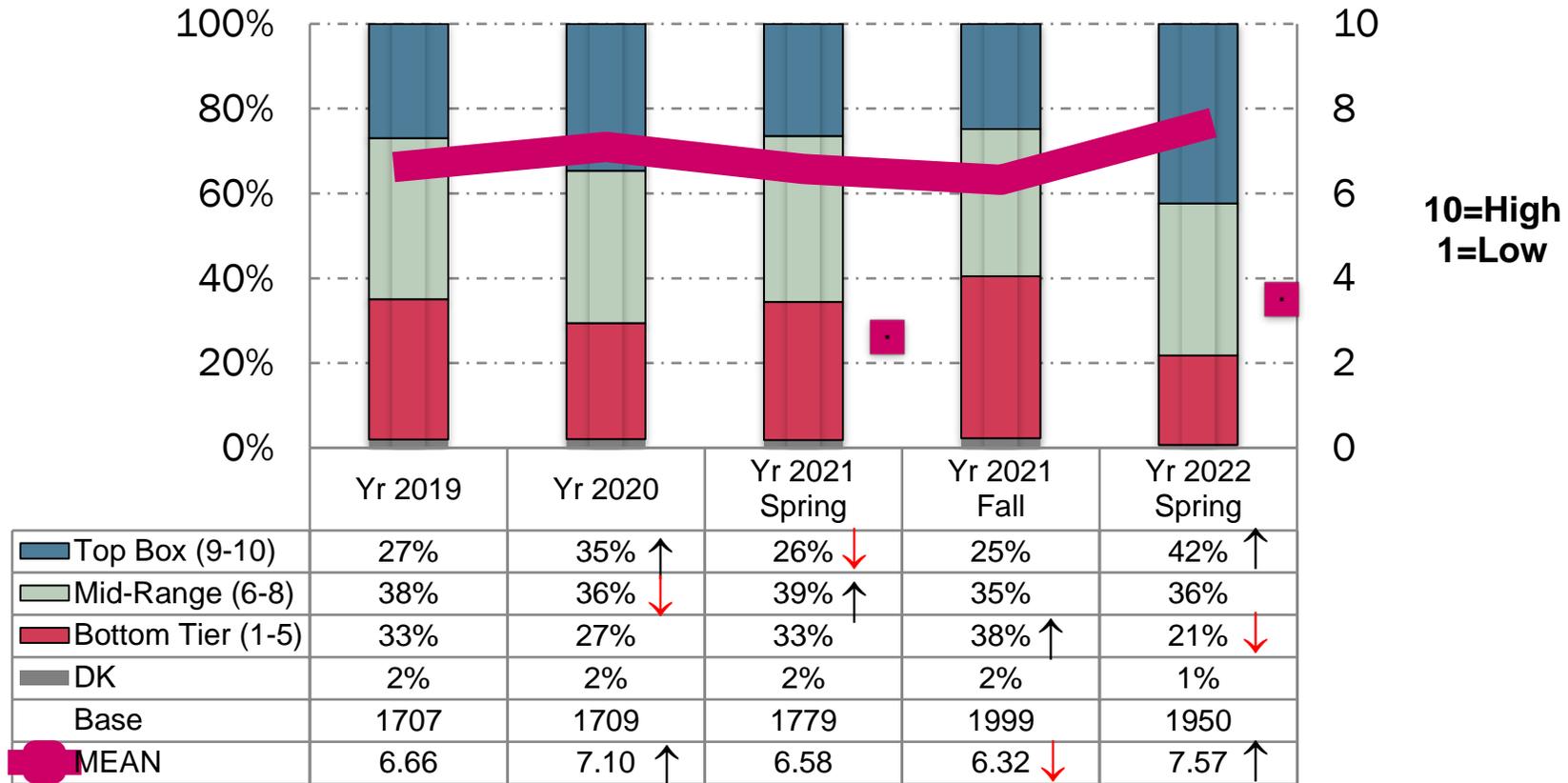
(According to residents saying Hawai'i tourism creates more **benefits** than problems)



Base: 1265 (Spring 2022), 1248 (Fall 2021)

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

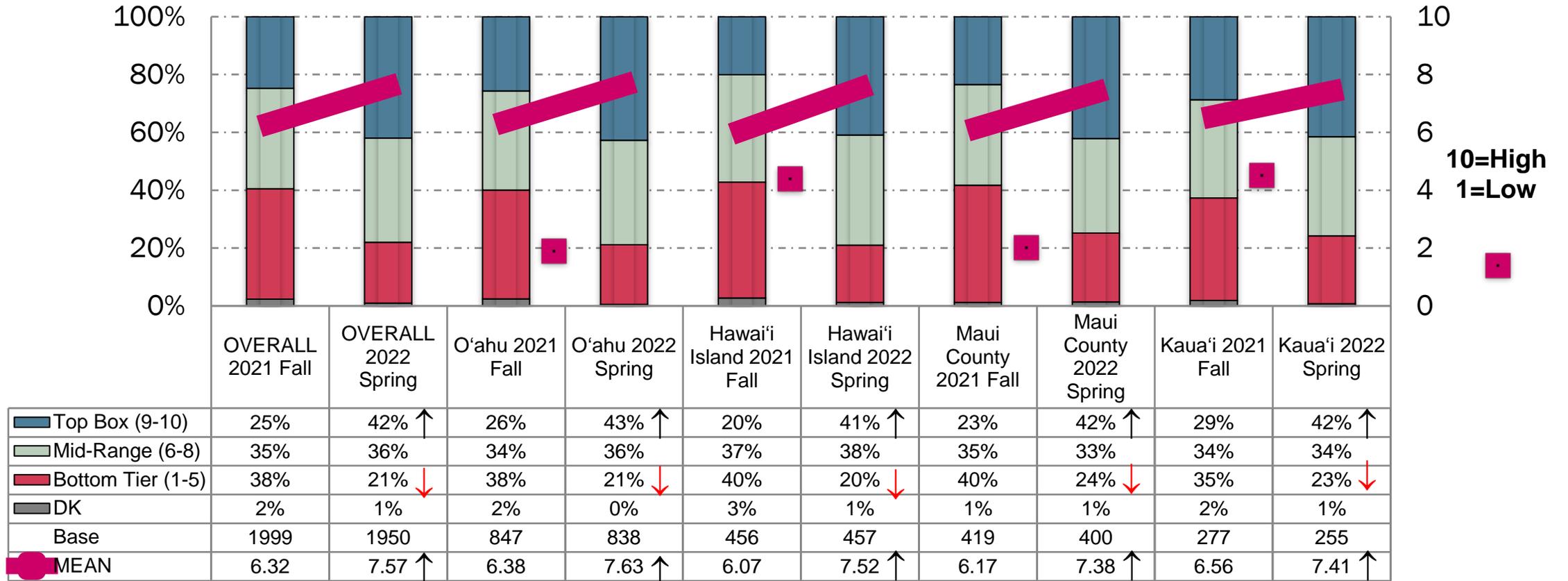
“Creates job opportunities for residents”* - *Overall*



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.”

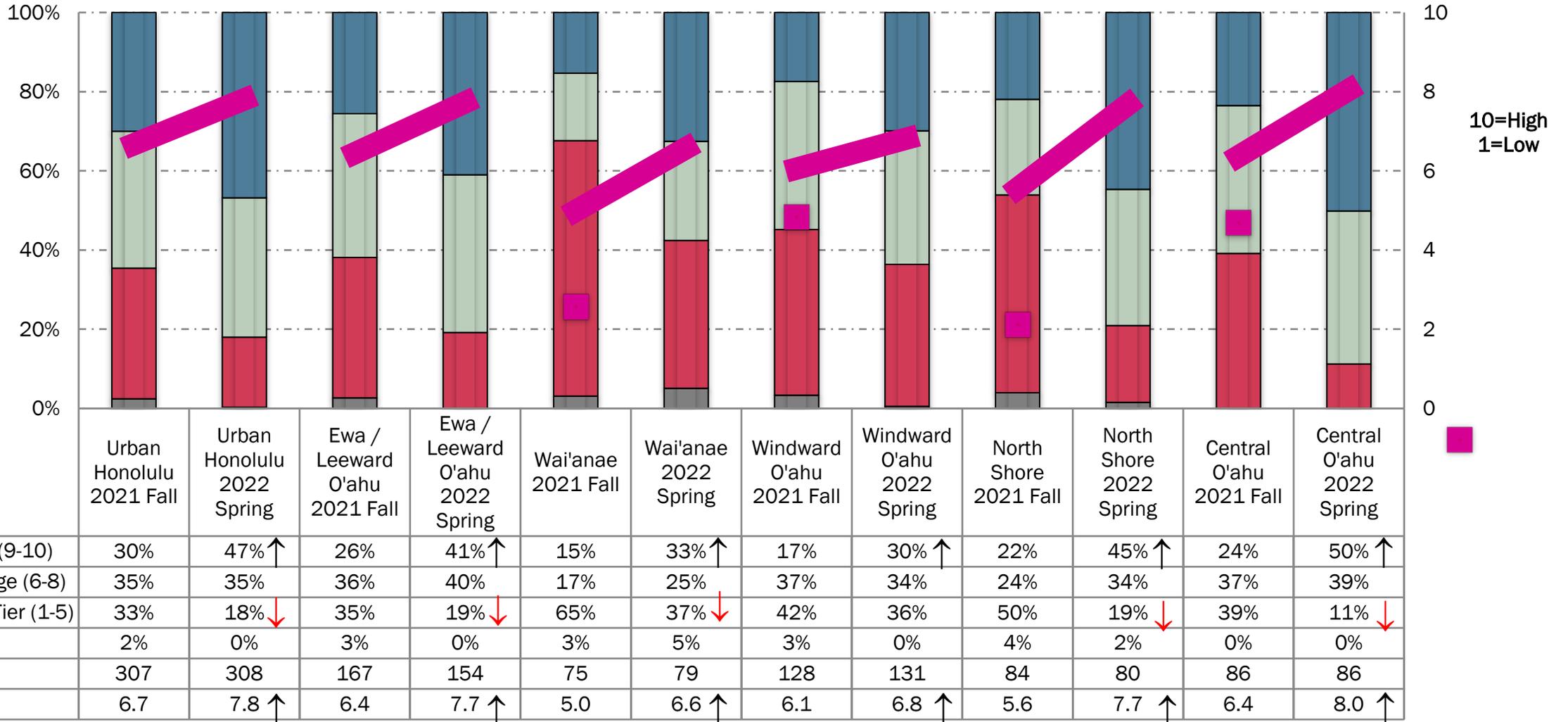
“Creates job opportunities for residents”* – *By Island*



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...?

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

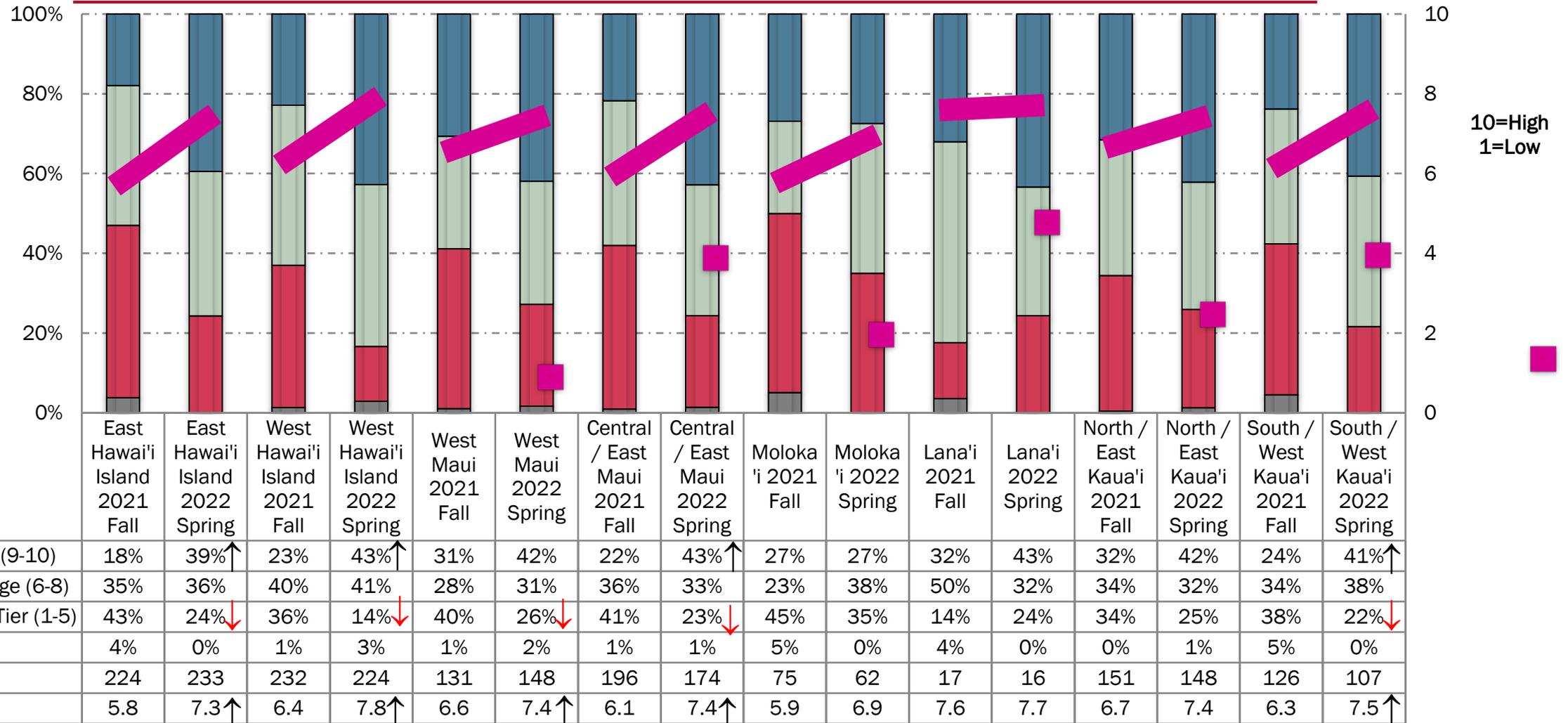
“Creates job opportunities for residents”* – By Area (O’ahu)



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...?

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

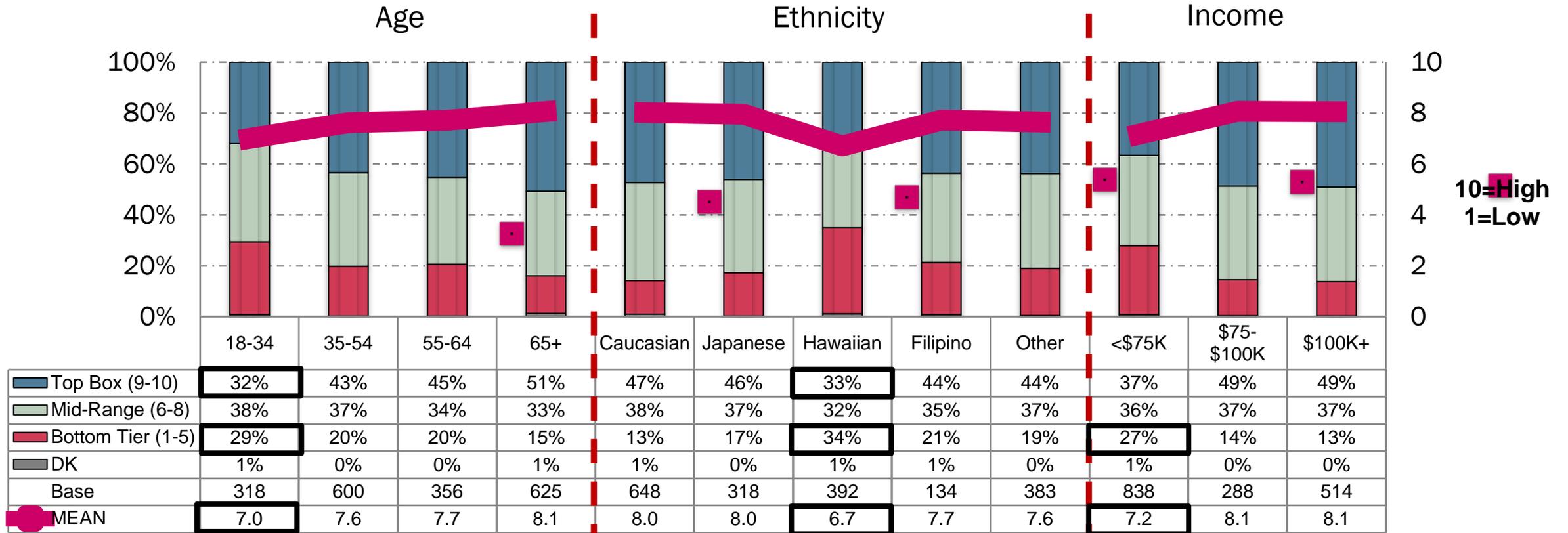
“Creates job opportunities for residents”* – By Area (Hawai‘i Island, Maui, & Kaua‘i)



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

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

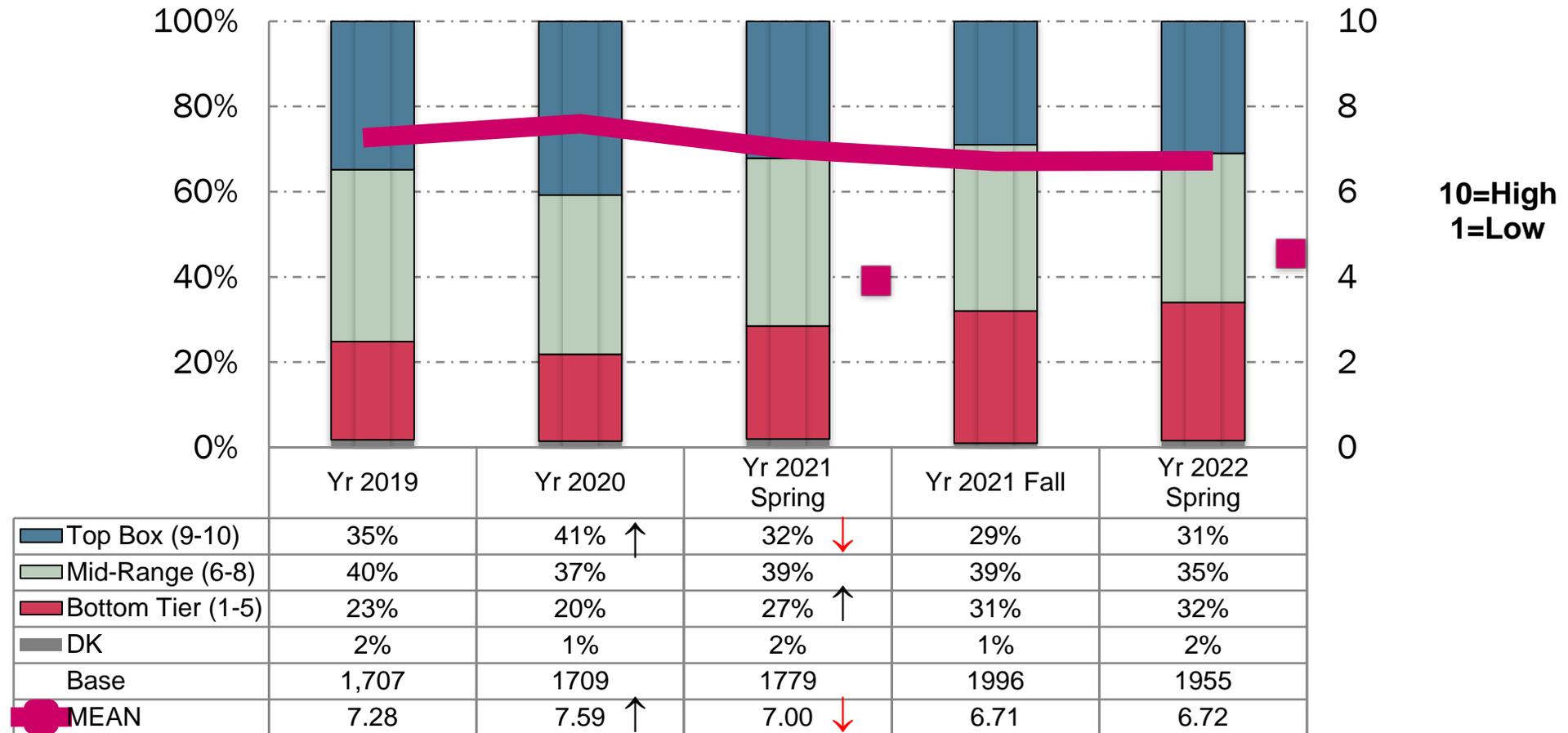
“Creates job opportunities for residents”* – *By Demographics*



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.

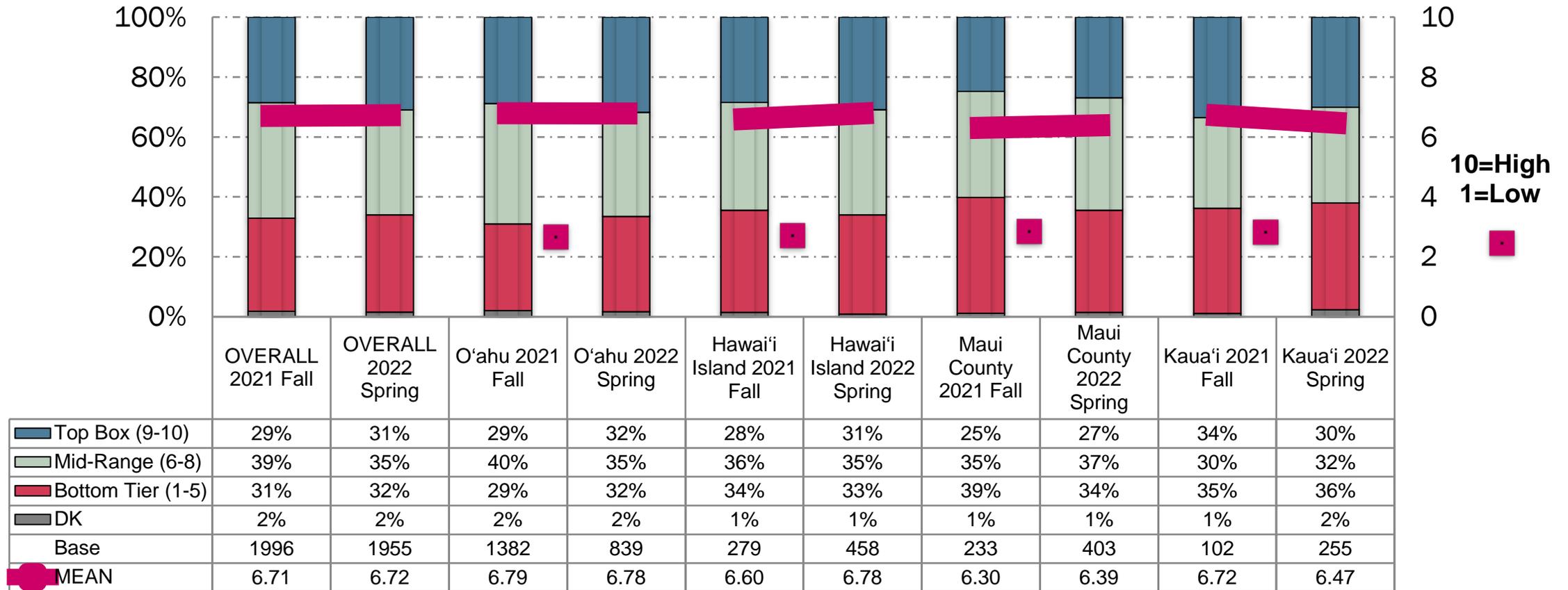
*Note: Changed in Spring 2022 fielding from “Tourism creates many well-paying jobs for residents.”

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



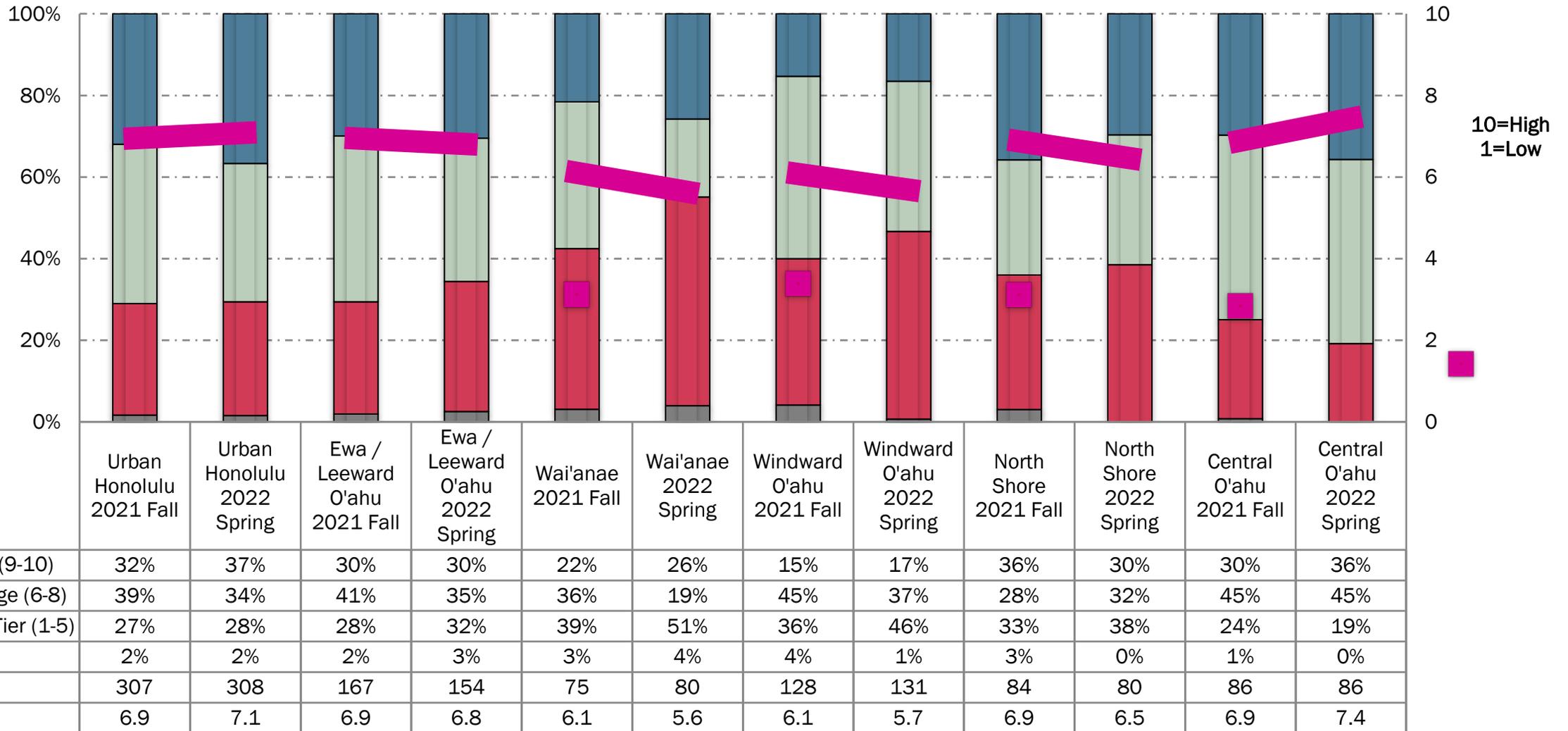
Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



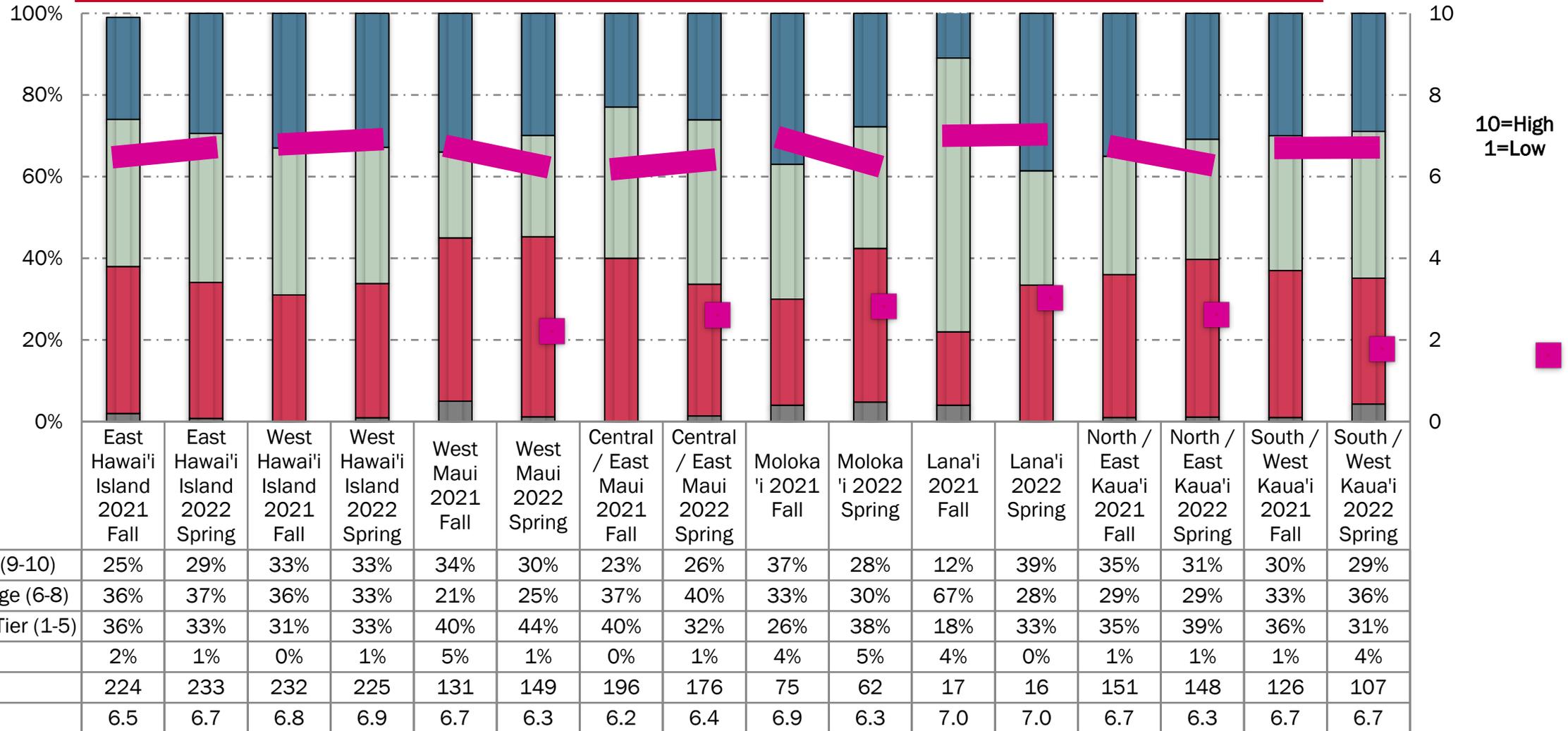
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



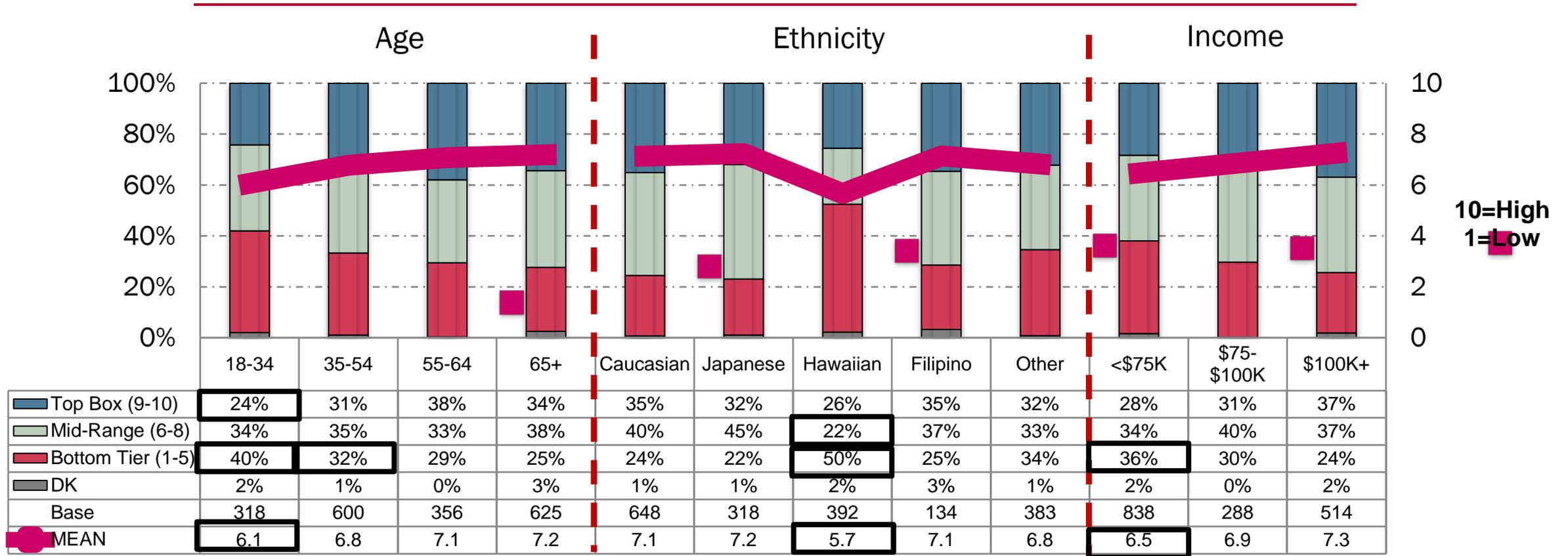
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



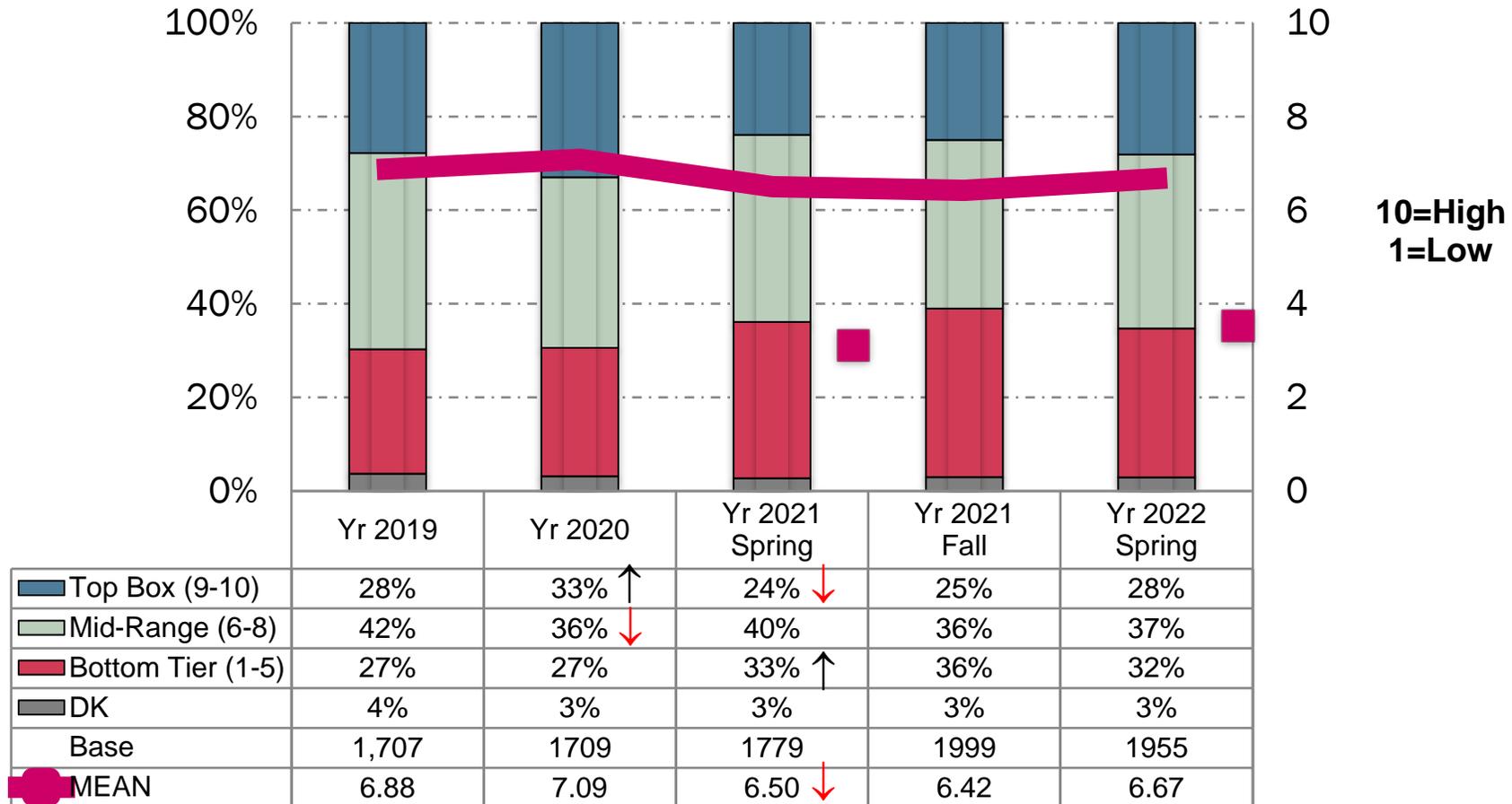
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

“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.

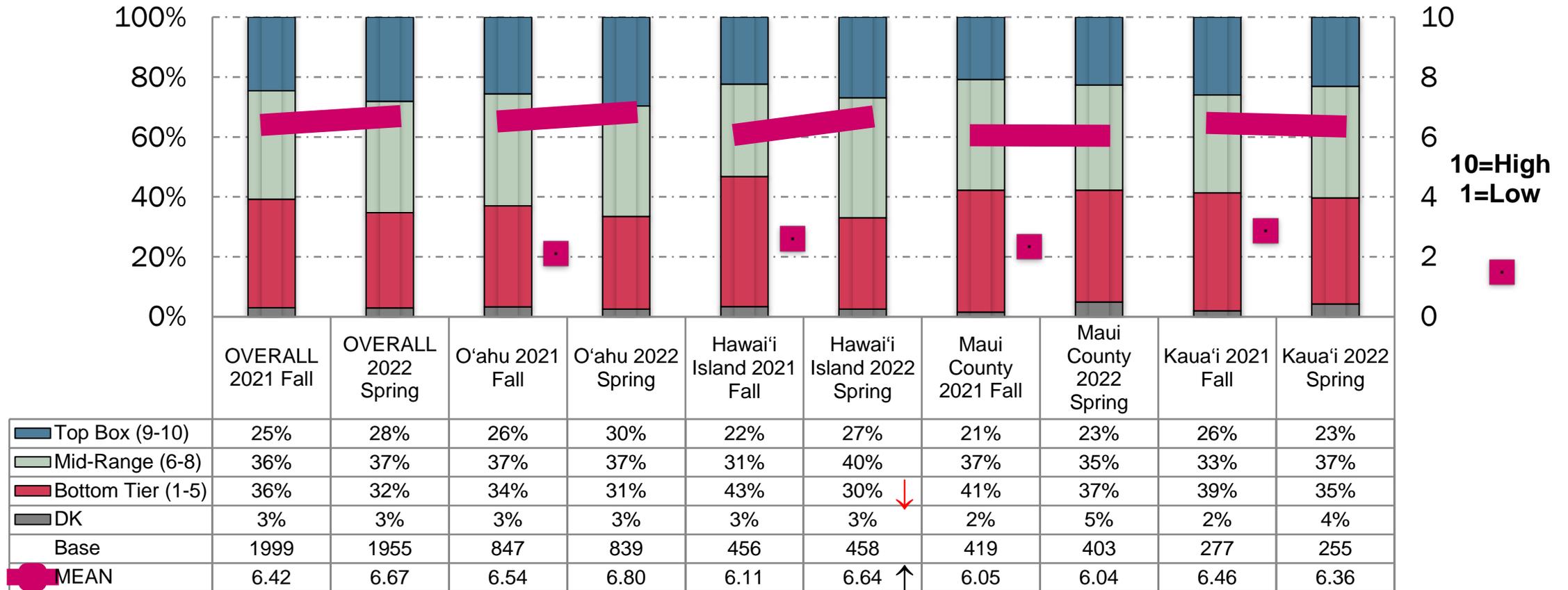
“Creates job opportunities with paths for advancement”* - Overall



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 jobs that have opportunities for advancement.”

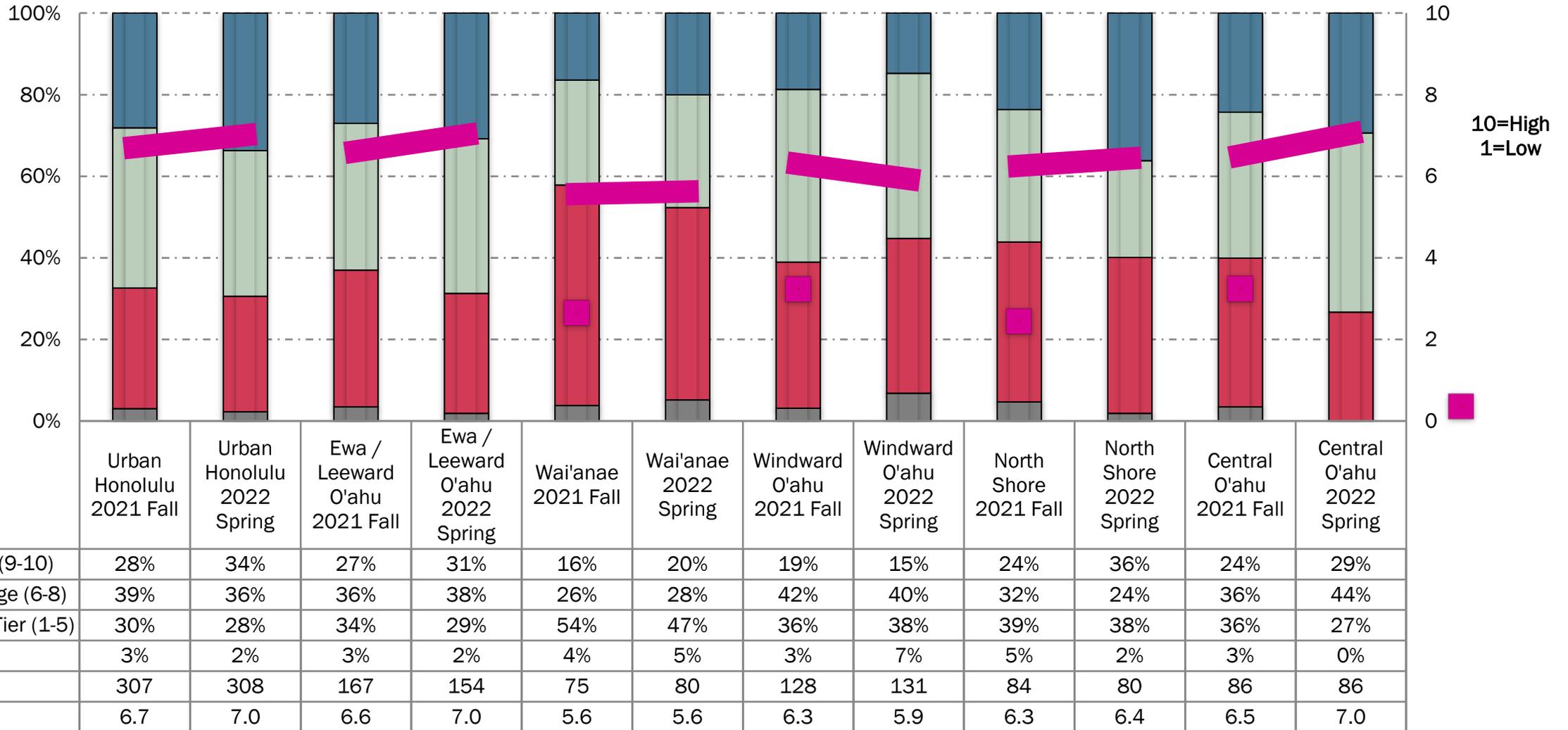
“Creates job opportunities with paths for advancement”* – *By Island*



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...?

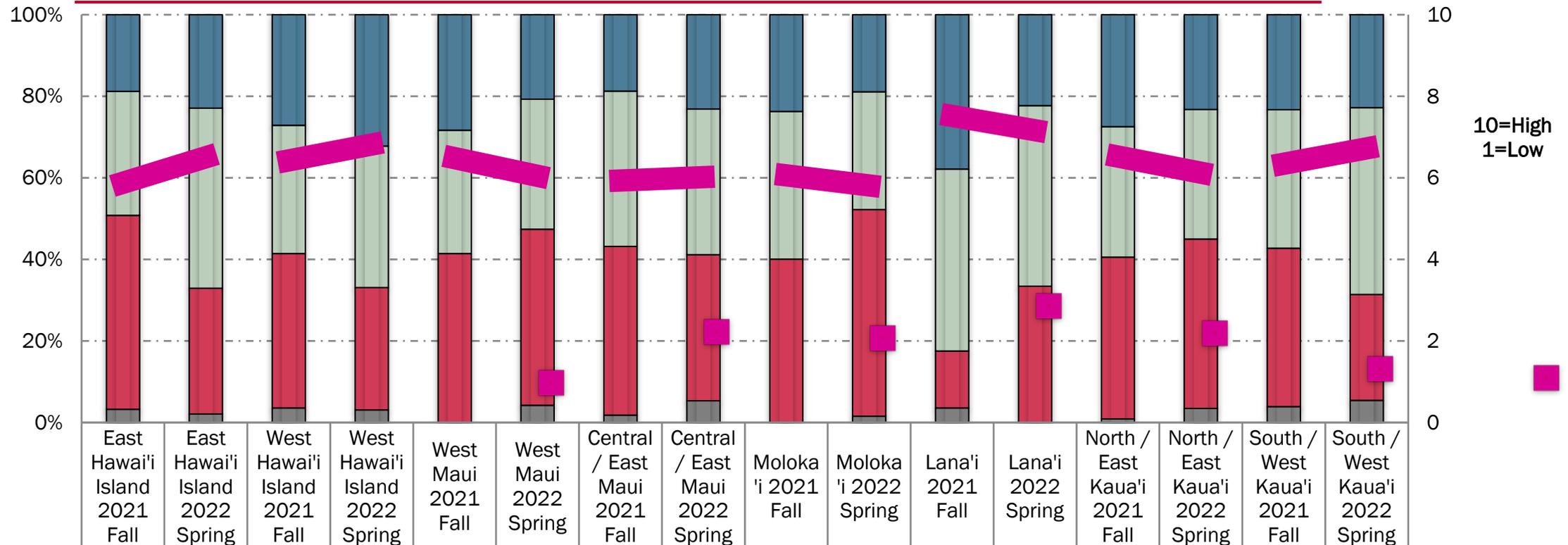
*Note: CHANGED in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

“Creates job opportunities with paths for advancement”* – 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...?
*Note: Changed in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

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

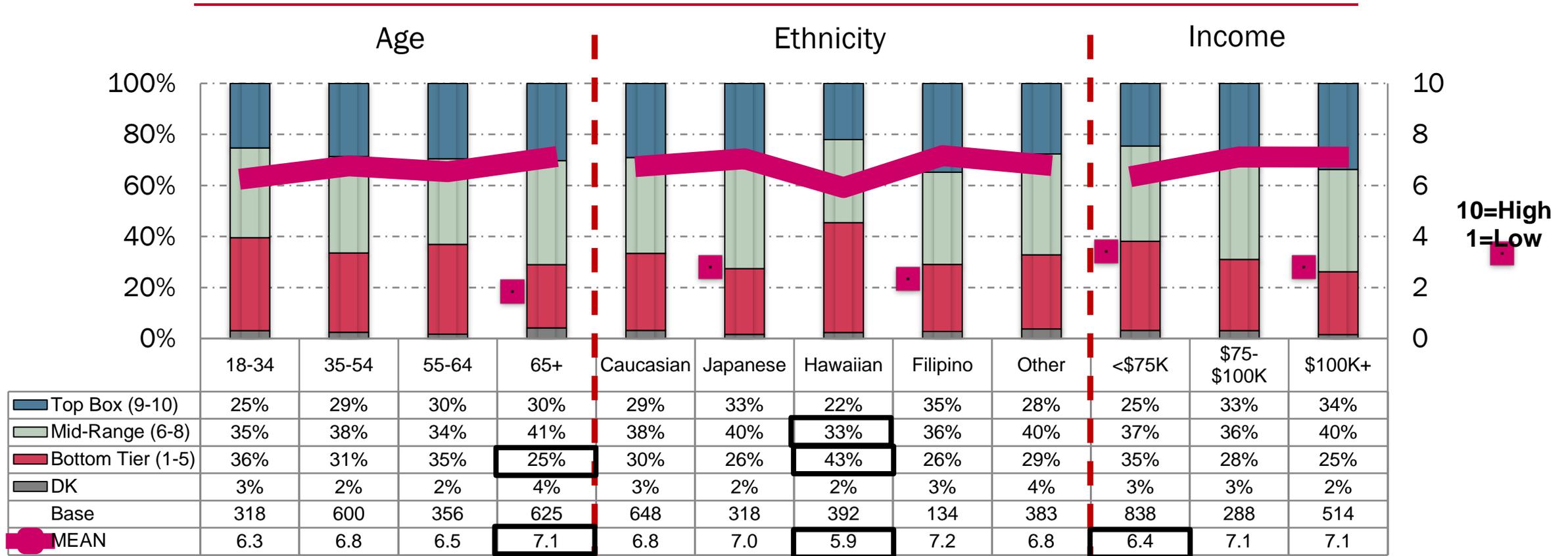


	East Hawai'i Island 2021 Fall	East Hawai'i Island 2022 Spring	West Hawai'i Island 2021 Fall	West Hawai'i Island 2022 Spring	West Maui 2021 Fall	West Maui 2022 Spring	Central / East Maui 2021 Fall	Central / East Maui 2022 Spring	Moloka'i 2021 Fall	Moloka'i 2022 Spring	Lana'i 2021 Fall	Lana'i 2022 Spring	North / East Kaua'i 2021 Fall	North / East Kaua'i 2022 Spring	South / West Kaua'i 2021 Fall	South / West Kaua'i 2022 Spring
Top Box (9-10)	19%	23%	27%	32%	28%	21%	19%	23%	24%	19%	38%	22%	27%	23%	23%	23%
Mid-Range (6-8)	30%	44%↑	31%	35%	30%	32%	38%	36%	36%	29%	45%	44%	32%	32%	34%	46%
Bottom Tier (1-5)	48%	31%	38%	30%	41%	43%	41%	36%	40%	51%	14%	33%	40%	42%	39%	26%
DK/Rf	3%	2%	4%	3%	0%	4%	2%	5%	0%	2%	4%	0%	1%	3%	4%	5%
Base	224	233	232	225	131	149	196	176	75	62	17	16	151	148	126	107
MEAN	5.9	6.5↑	6.4	6.8	6.5	6.0	5.9	6.0	6.1	5.8	7.5	7.2	6.5	6.1	6.3	6.7

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

*Note: Changed in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

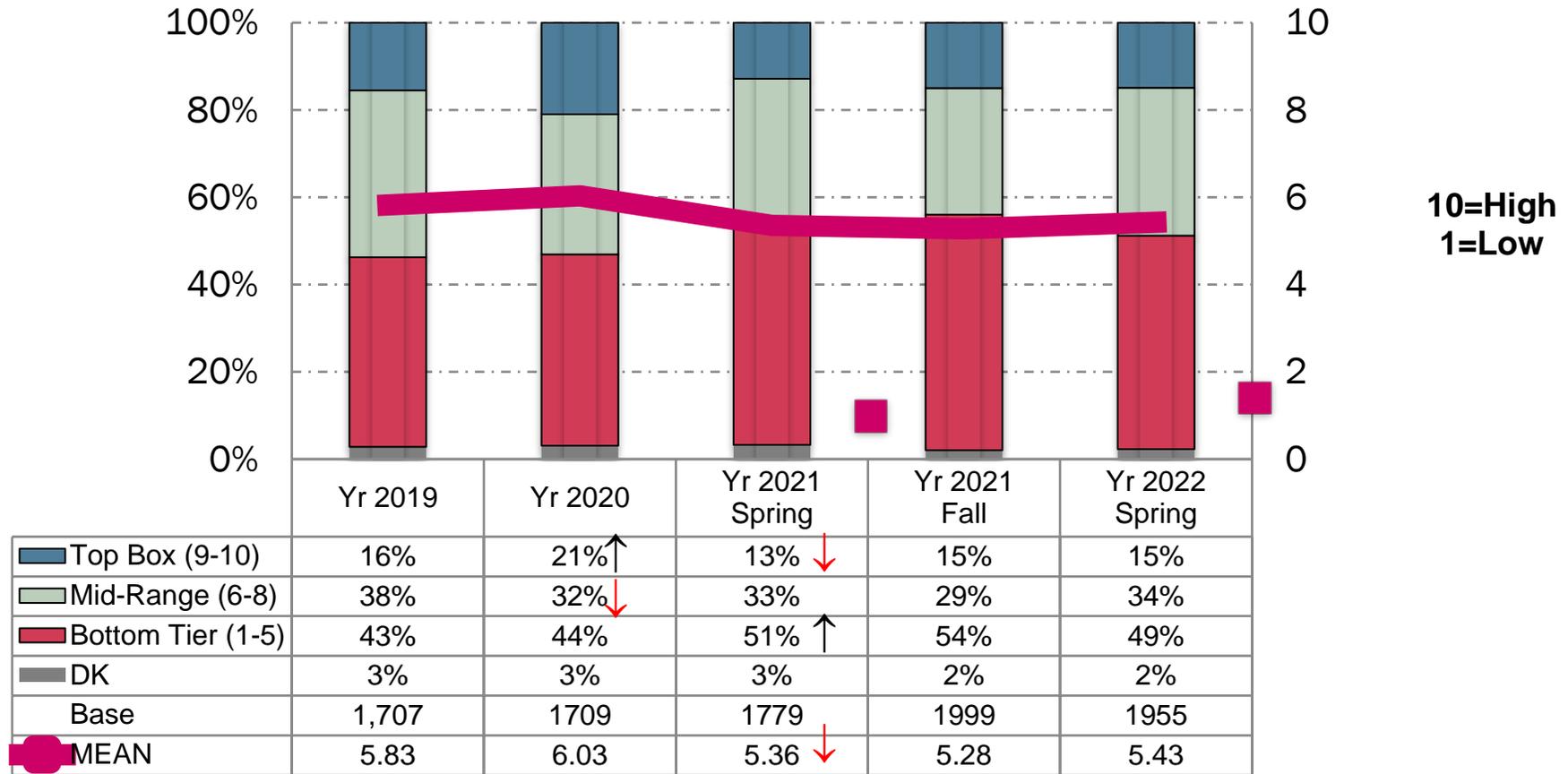
“Creates job opportunities with paths for advancement”* – *By Demographics*



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.

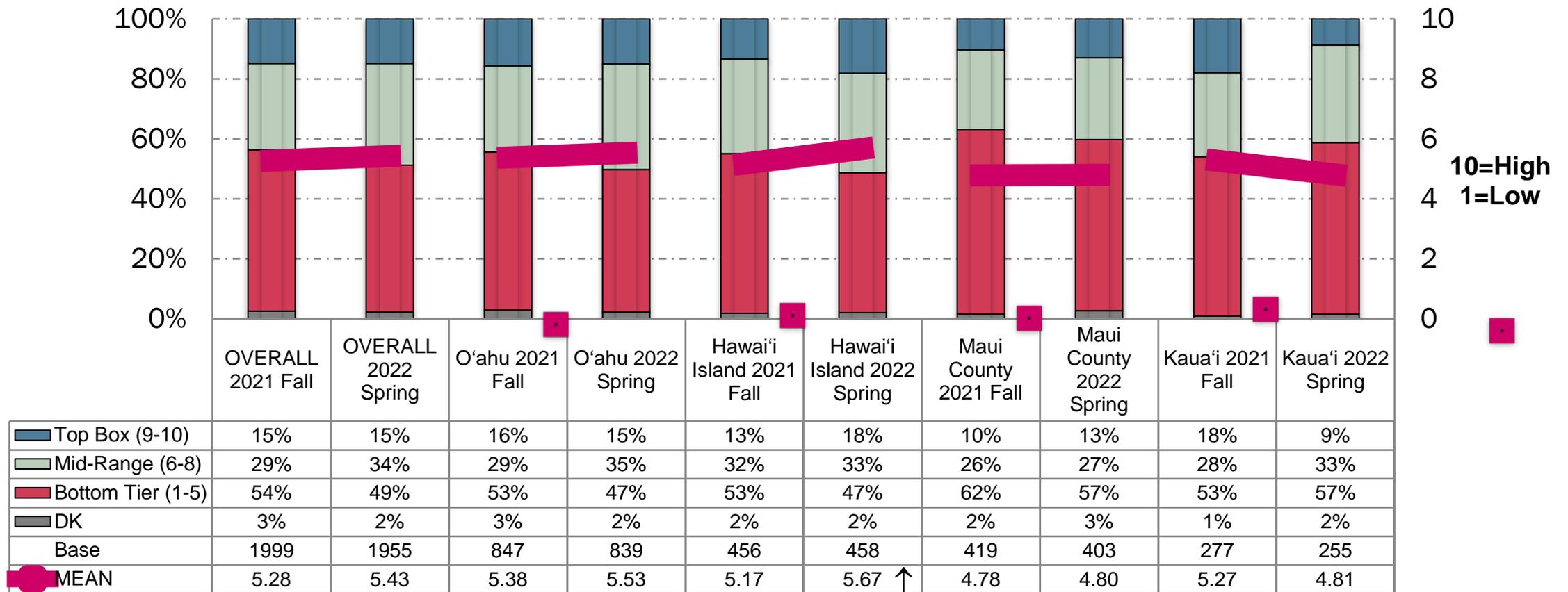
*Note: Changed in Spring 2022 fielding from “Tourism creates jobs that have opportunities for advancement.”

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



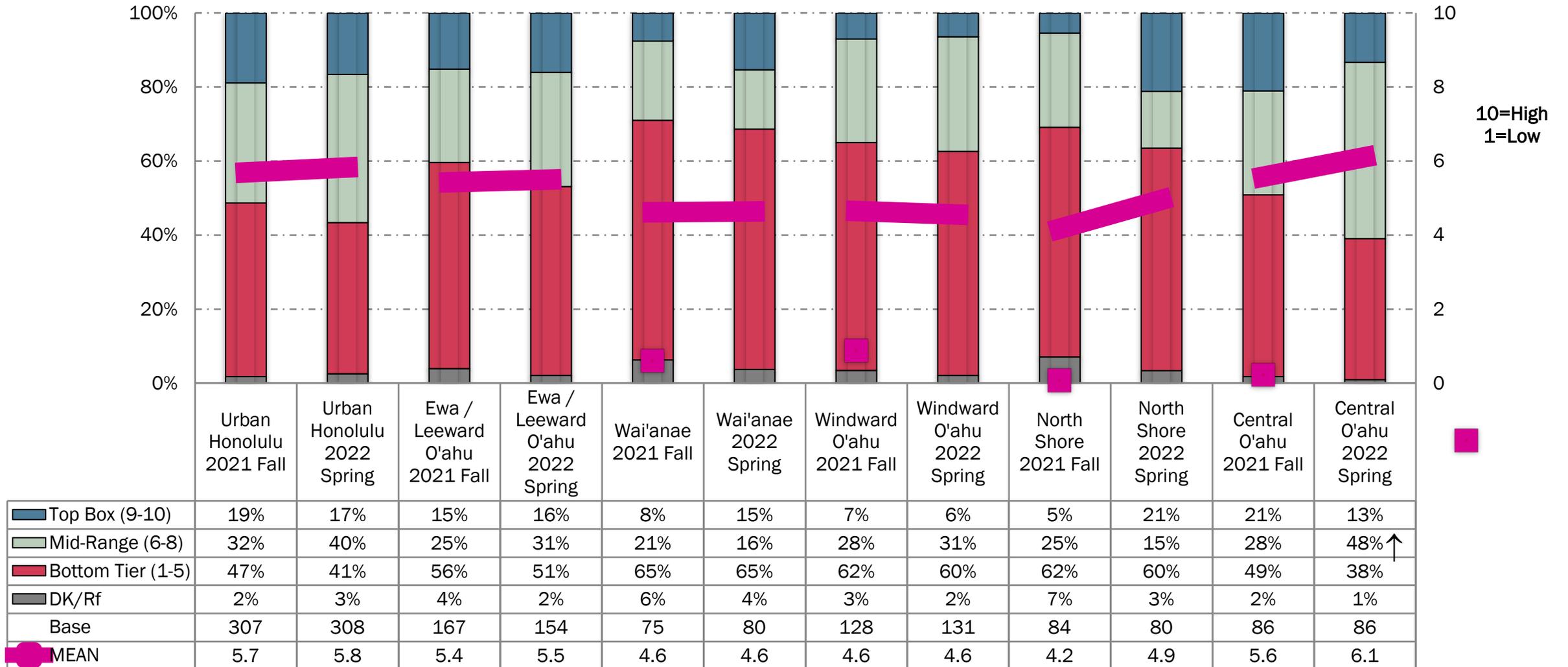
Q3.6. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



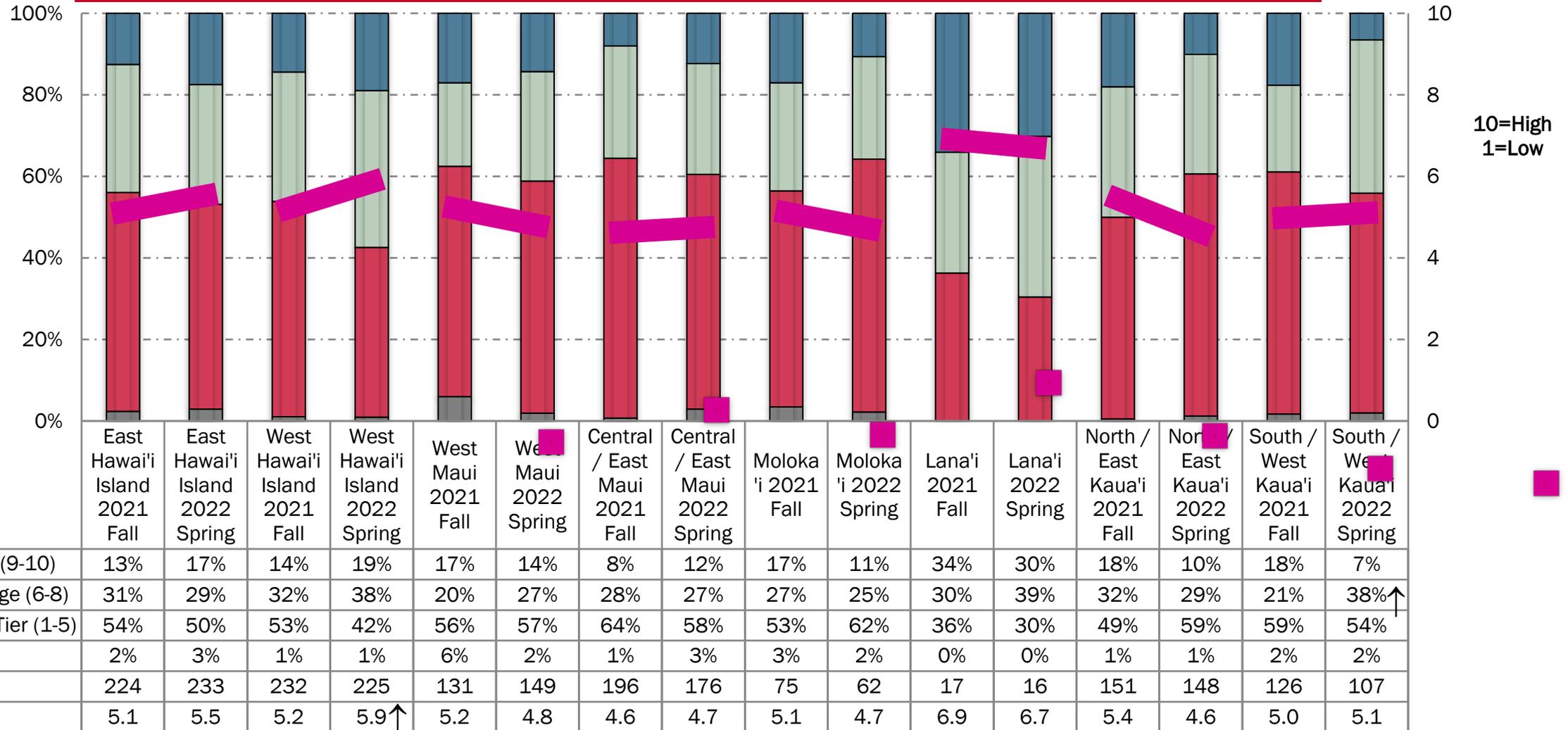
Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

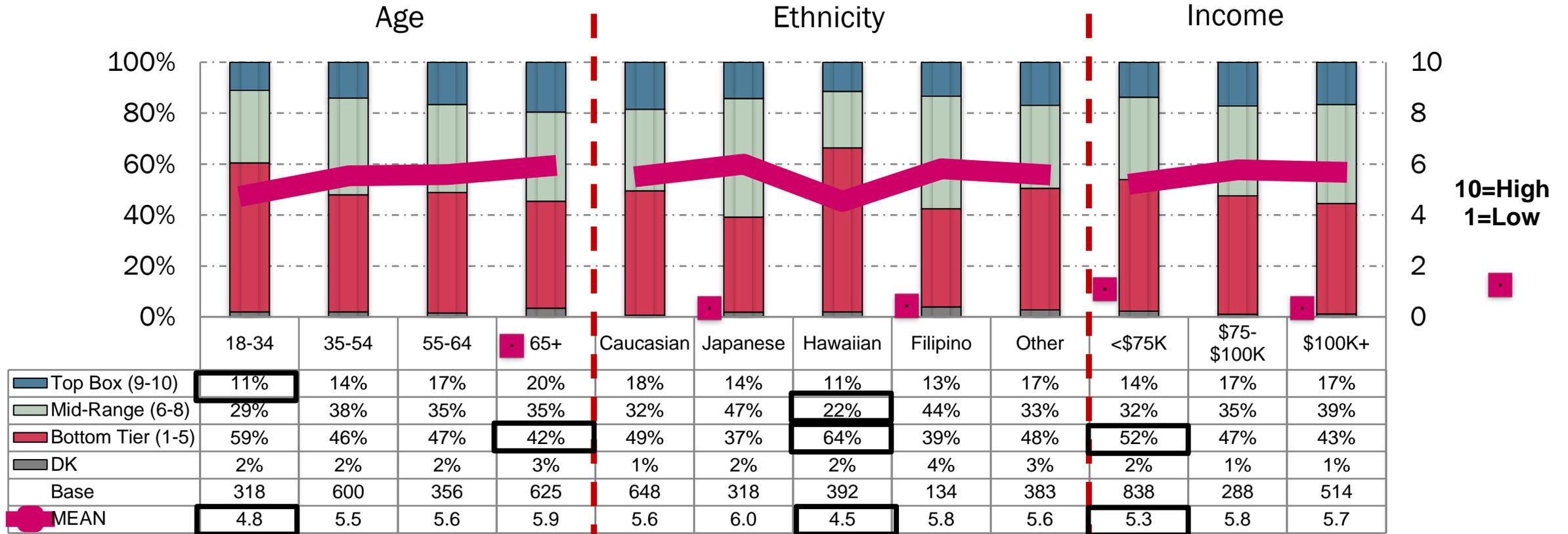
“Is an industry that enhances residents’ quality of life” – By Area (Hawai‘i Island, Maui, & Kaua‘i)



Q3.6. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

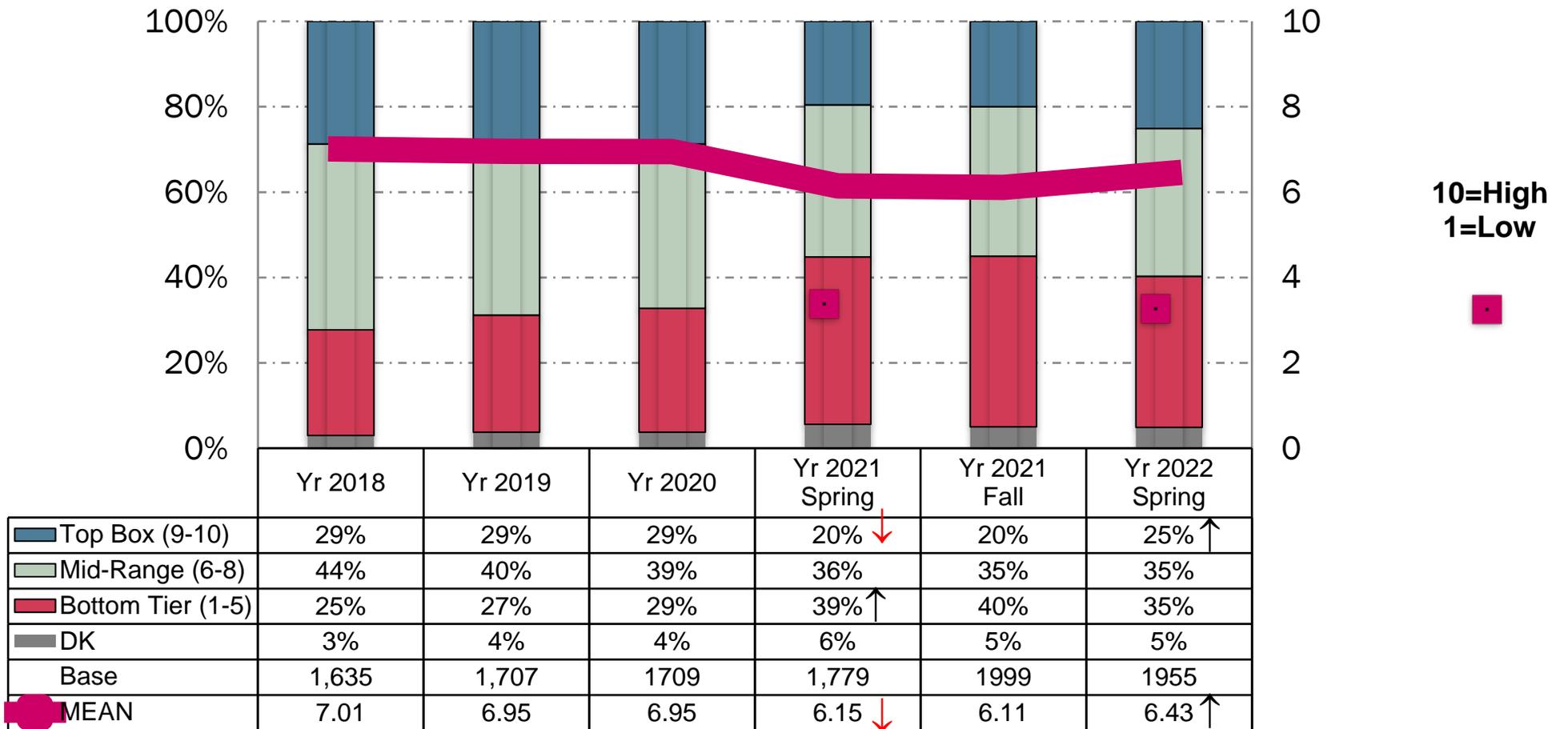
“Is an industry that enhances residents’ quality of life”

– *By Demographics*



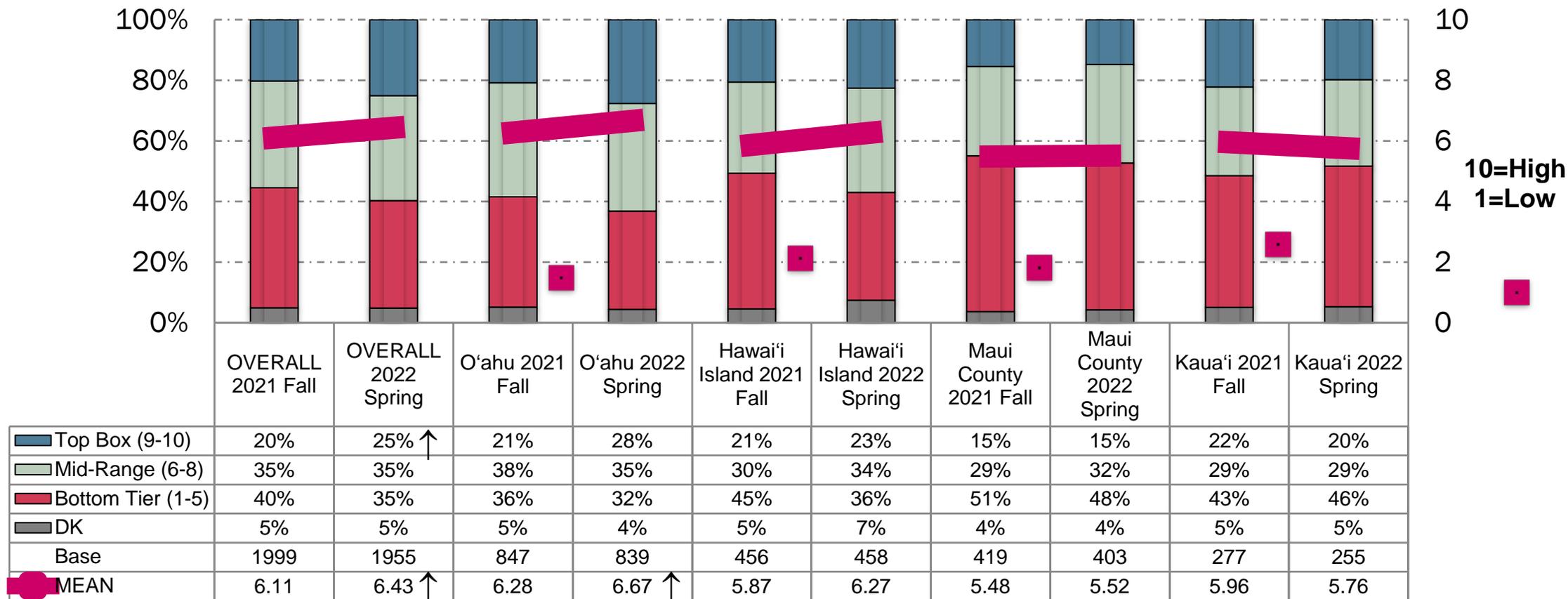
Q3.6. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



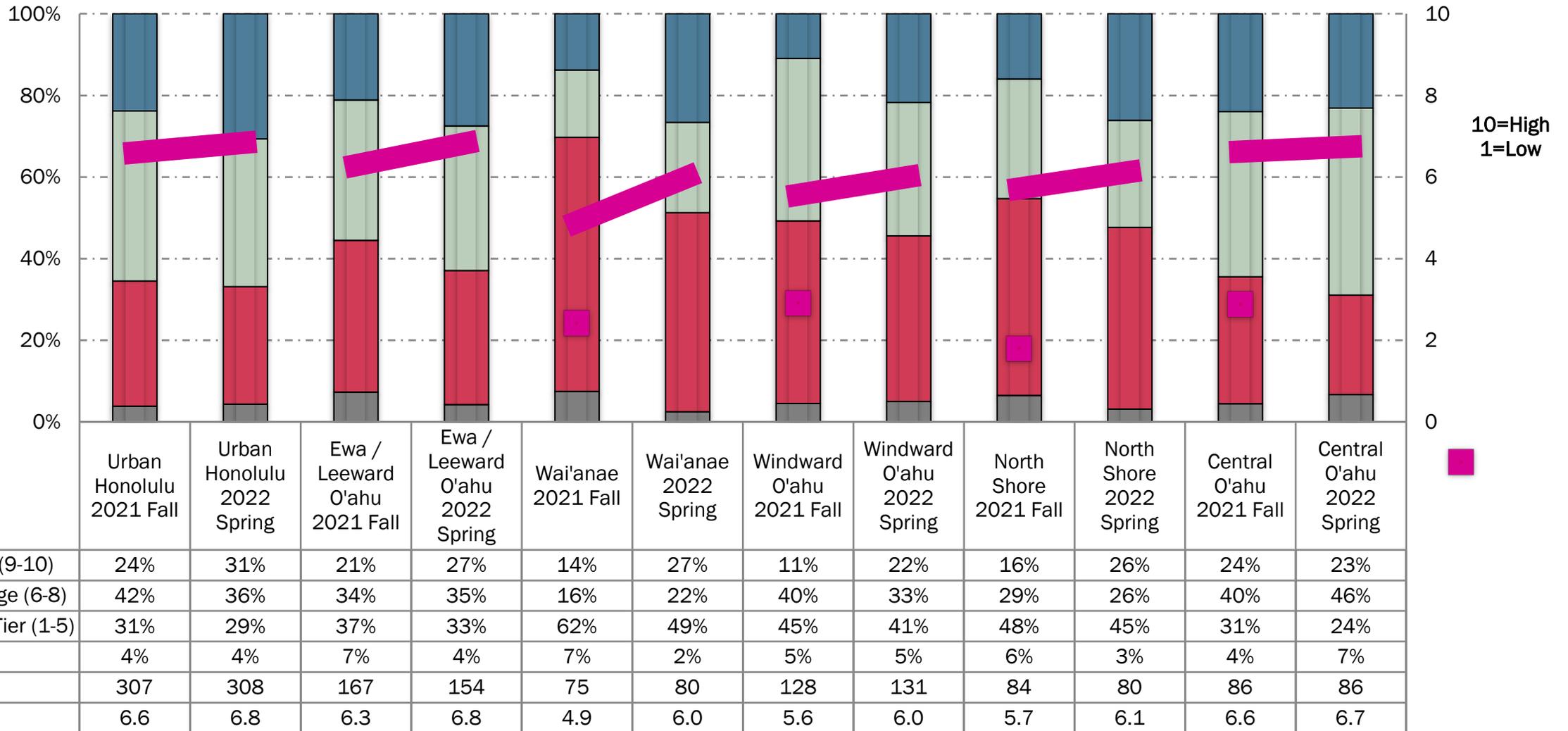
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“Sponsors festivals, activities, & sports events for residents & visitors” – *By Island*



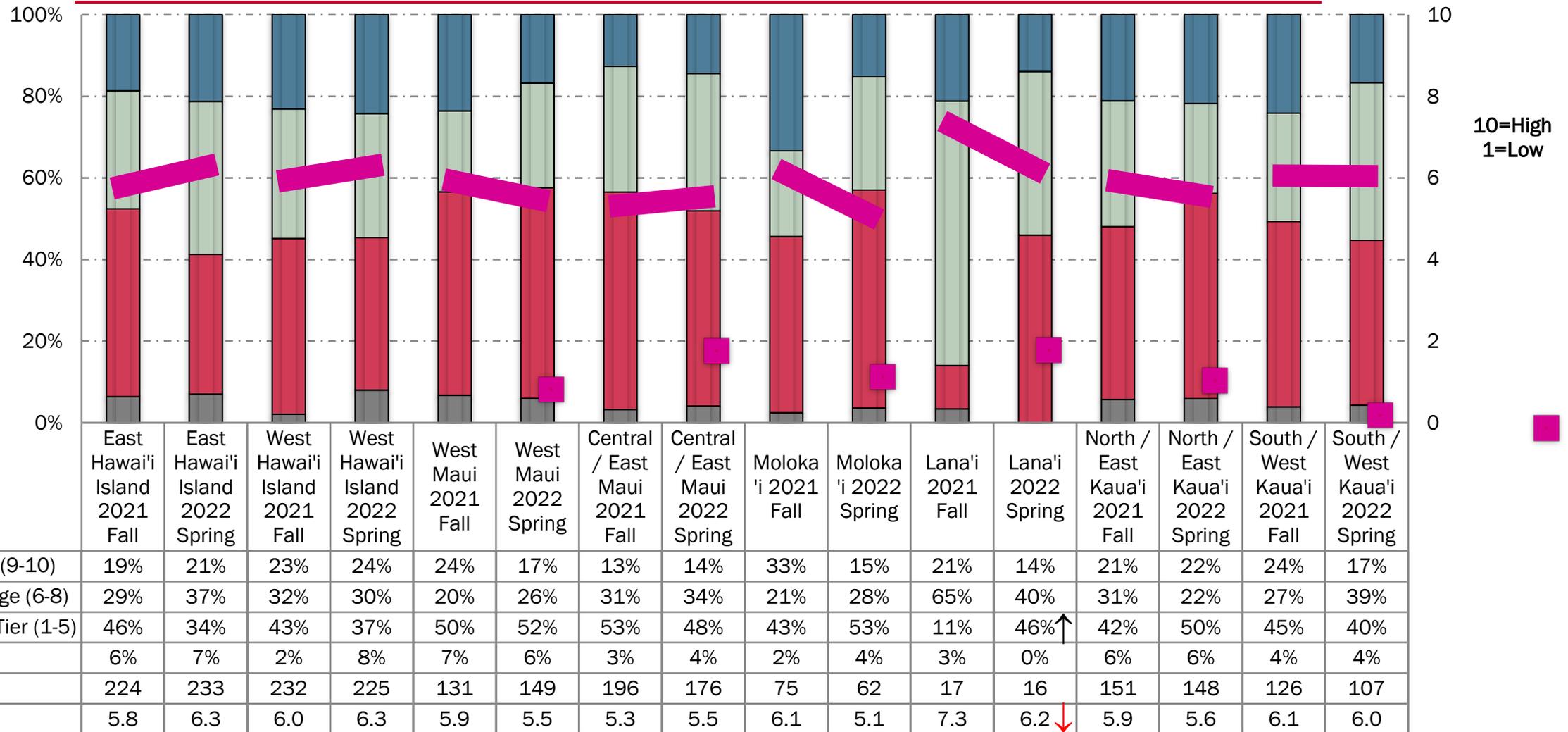
Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

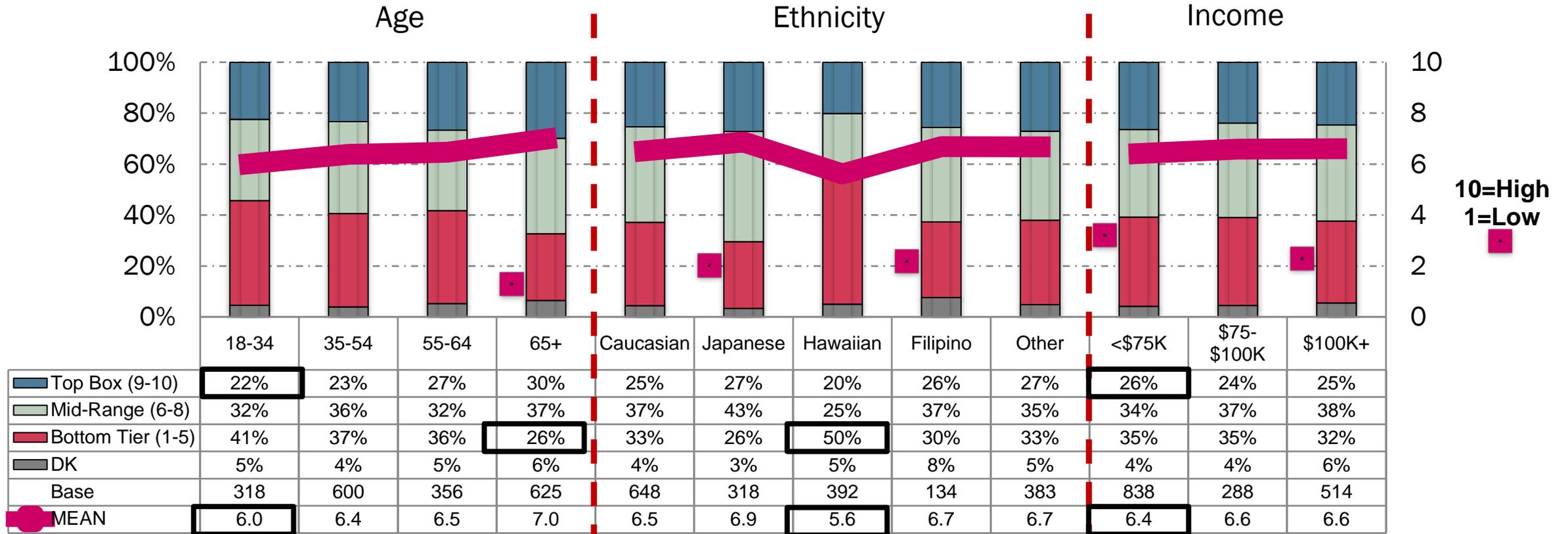
“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



Q3.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

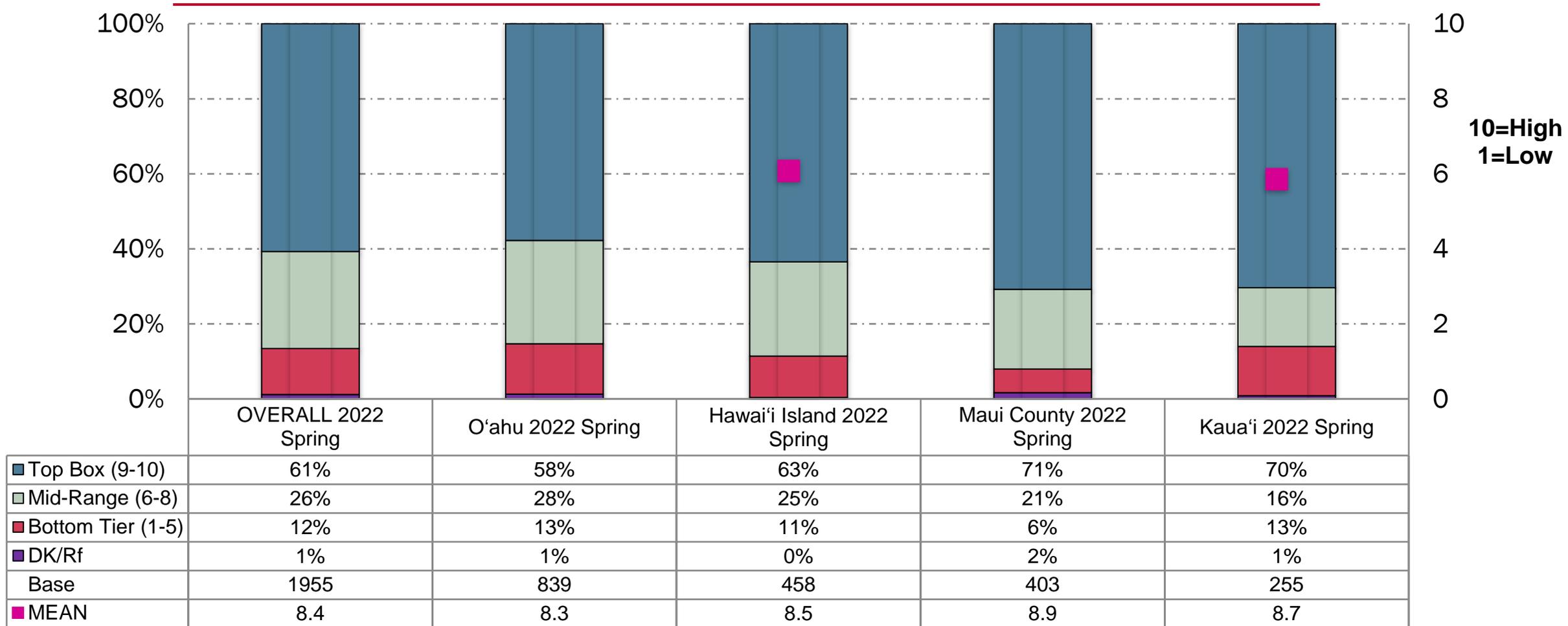
“Sponsors festivals, activities & sports events for residents & visitors”

– *By Demographics*



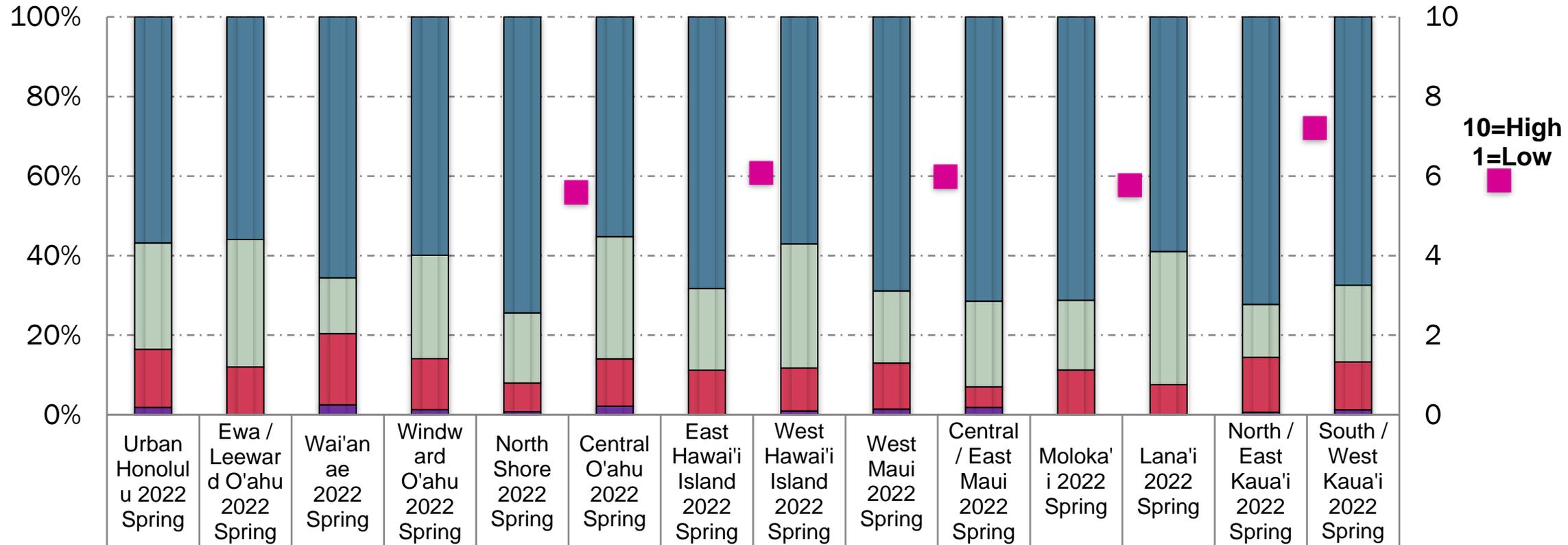
Q3.7. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



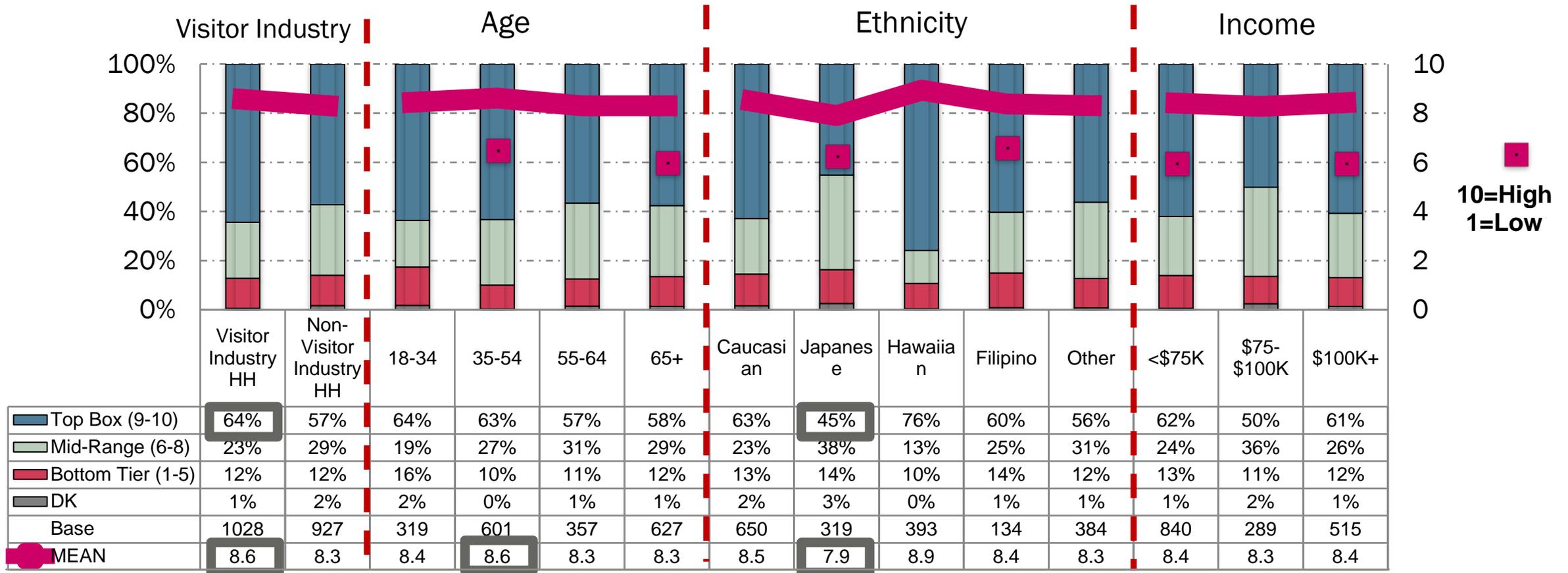
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



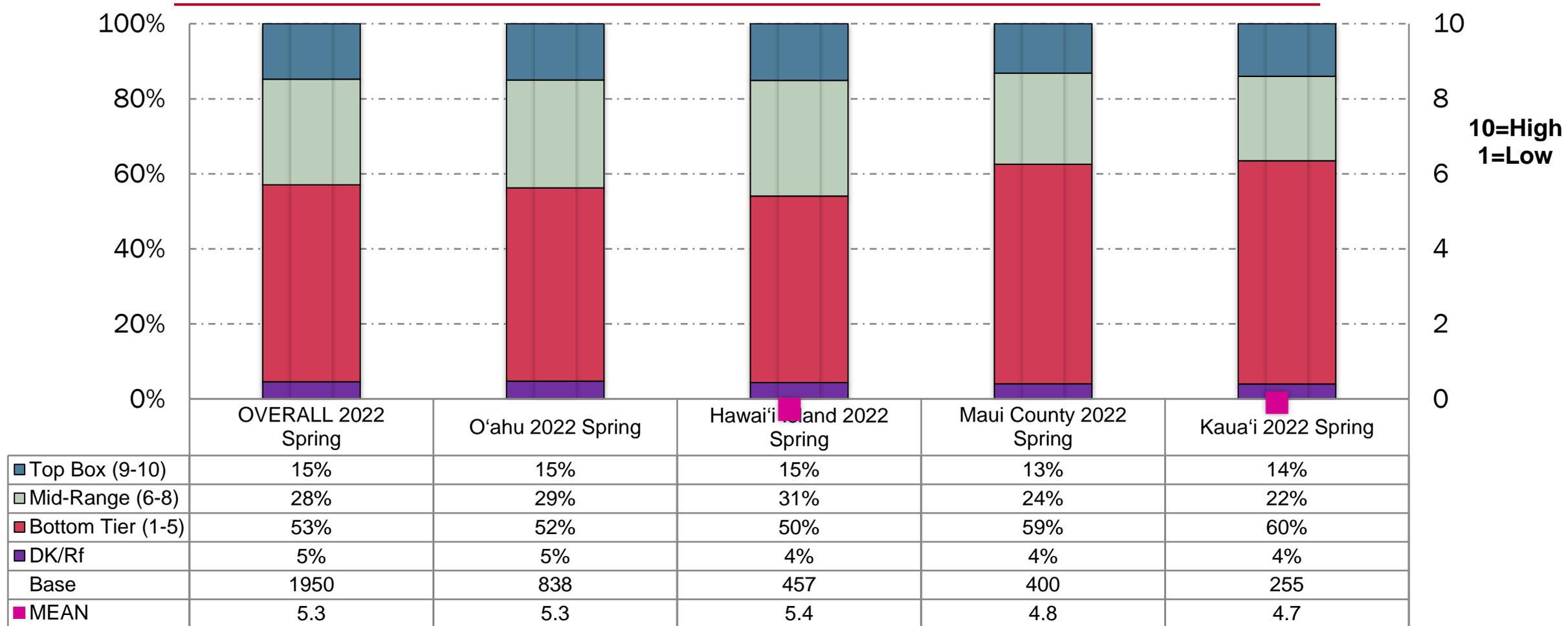
■ Top Box (9-10)	57%	56%	66%	60%	74%	55%	68%	57%	69%	71%	71%	59%	72%	67%
■ Mid-Range (6-8)	27%	32%	14%	26%	18%	31%	21%	31%	18%	22%	18%	33%	13%	19%
■ Bottom Tier (1-5)	15%	12%	18%	13%	7%	12%	11%	11%	12%	5%	11%	8%	14%	12%
■ DK/Rf	2%	0%	2%	1%	1%	2%	0%	1%	1%	2%	0%	0%	1%	1%
Base	308	154	80	131	80	86	233	225	149	176	62	16	148	107
■ MEAN	8.2	8.4	8.4	8.3	9.0	8.3	8.6	8.5	8.7	9.0	8.7	8.4	8.8	8.7

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



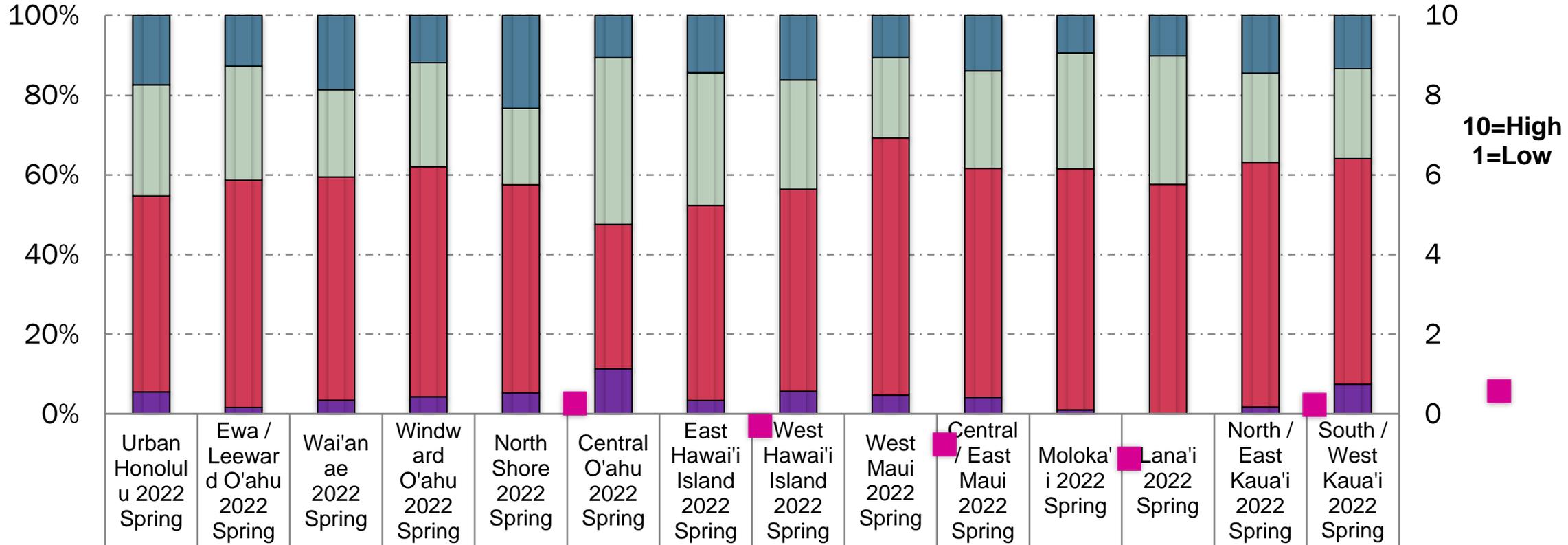
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



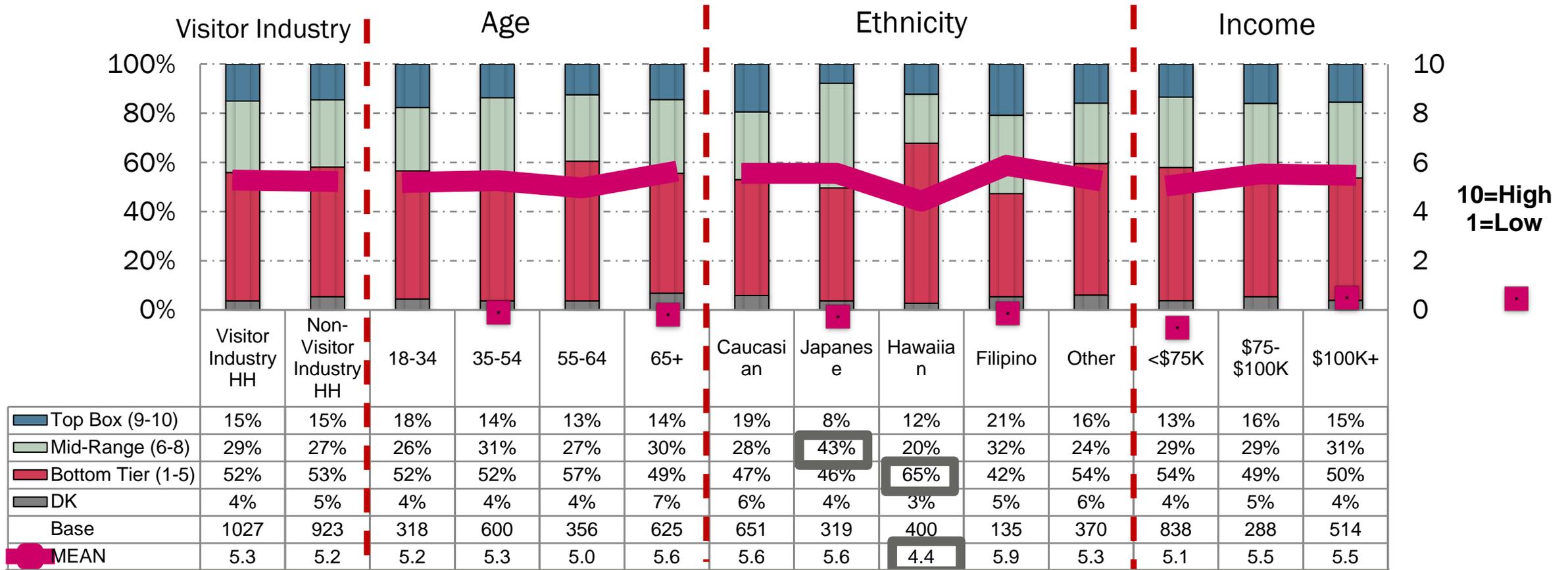
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



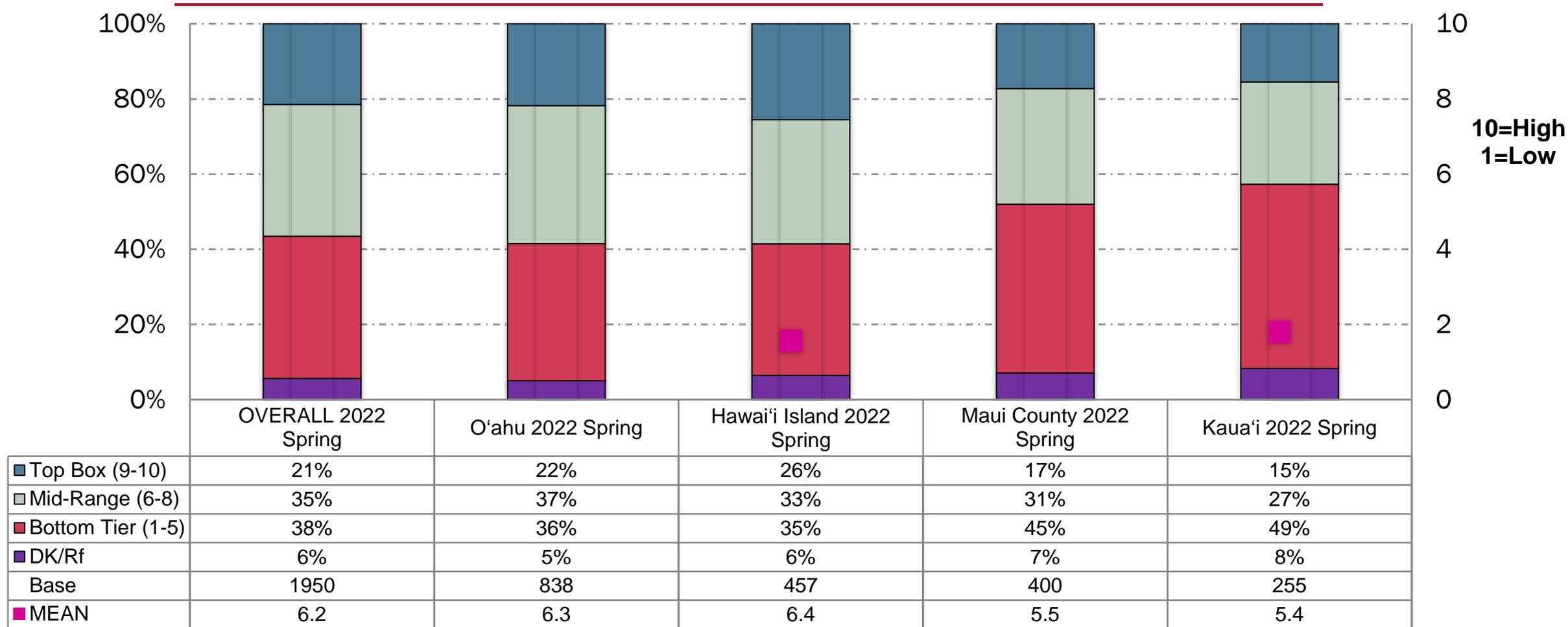
■ Top Box (9-10)	17%	13%	19%	12%	23%	11%	14%	16%	11%	14%	9%	10%	14%	13%
■ Mid-Range (6-8)	28%	29%	22%	26%	19%	42%	33%	27%	20%	24%	29%	32%	22%	23%
■ Bottom Tier (1-5)	49%	57%	56%	58%	52%	36%	49%	51%	65%	57%	61%	58%	61%	57%
■ DK/Rf	6%	2%	3%	4%	5%	11%	3%	6%	5%	4%	1%	0%	2%	7%
Base	308	154	79	131	80	86	233	224	148	174	62	16	148	107
■ MEAN	5.5	5.2	5.0	4.8	5.5	5.7	5.4	5.4	4.4	4.8	4.4	5.4	4.6	4.8

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



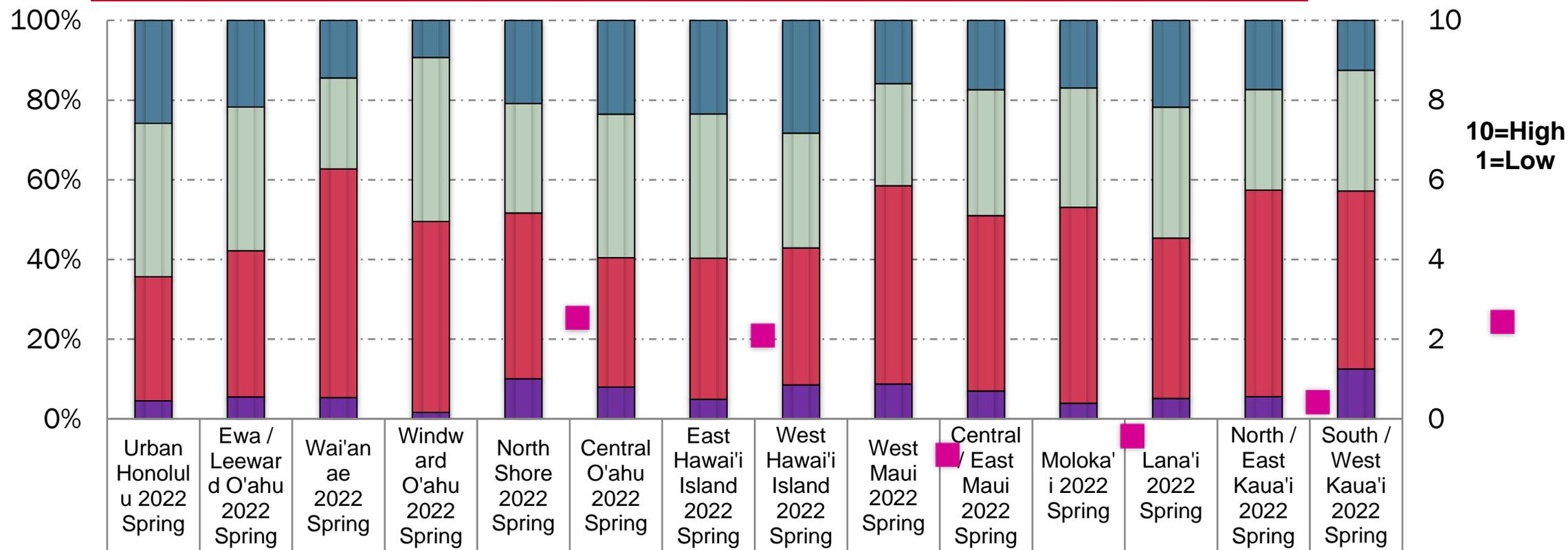
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



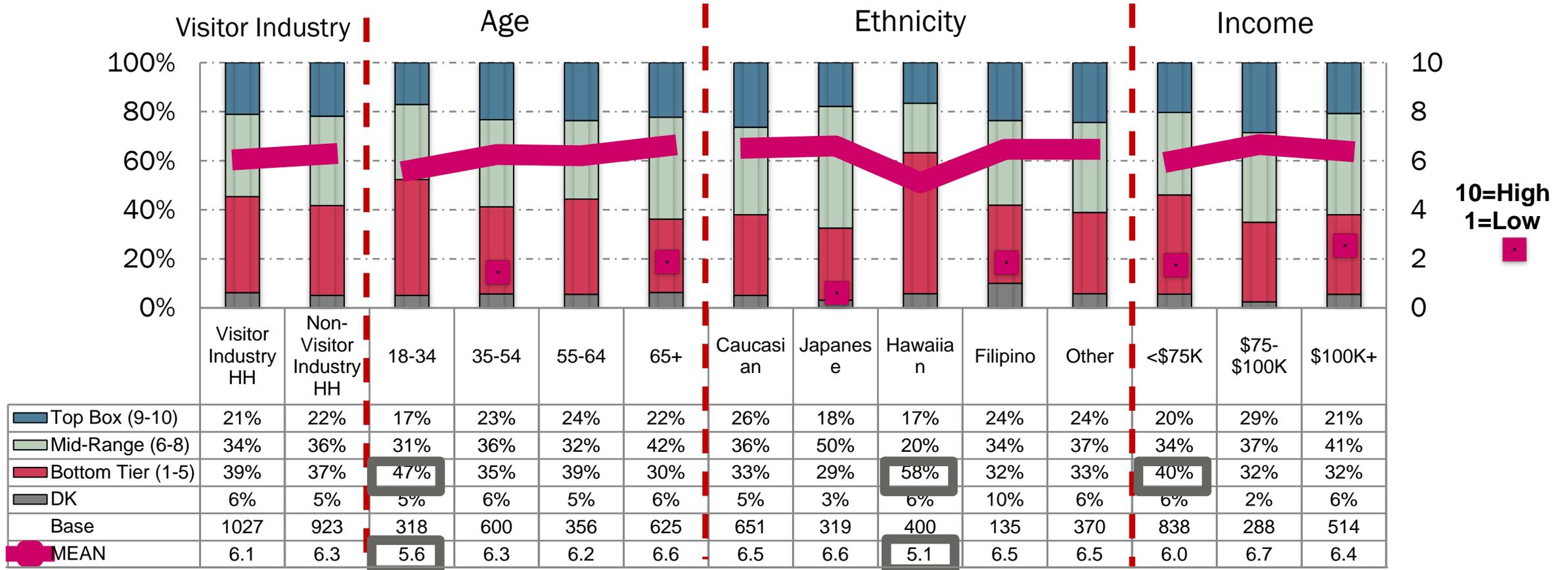
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism helps fund the stewardship of Hawai’i’s natural resources, parks and cultural sites.” – *By Area*



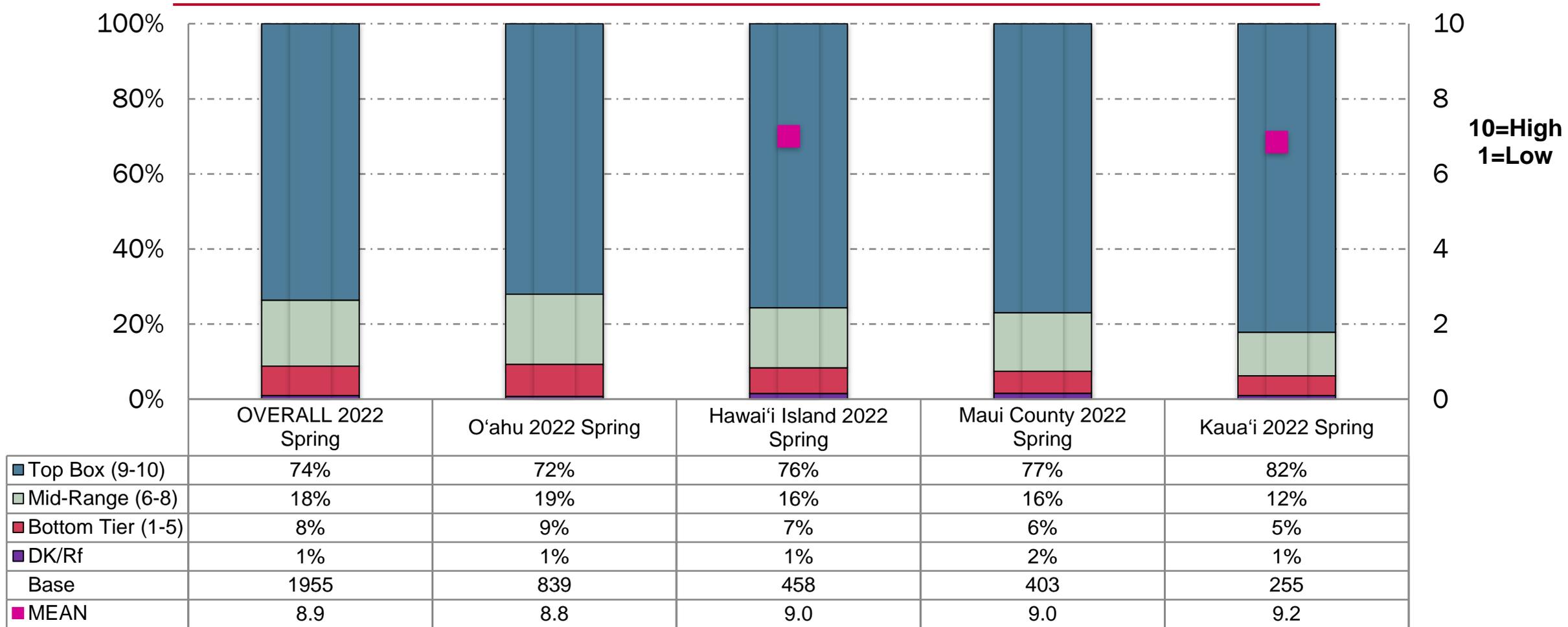
■ Top Box (9-10)	26%	22%	14%	9%	21%	24%	23%	28%	16%	17%	17%	22%	17%	13%
■ Mid-Range (6-8)	39%	36%	23%	41%	28%	36%	36%	29%	26%	32%	30%	33%	25%	30%
■ Bottom Tier (1-5)	31%	37%	57%	48%	42%	32%	35%	34%	50%	44%	49%	40%	52%	45%
■ DK/Rf	5%	5%	5%	2%	10%	8%	5%	9%	9%	7%	4%	5%	6%	13%
Base	308	154	79	131	80	86	233	224	148	174	62	16	148	107
■ MEAN	6.7	6.4	4.9	5.2	5.6	6.6	6.3	6.5	5.2	5.6	5.8	6.3	5.3	5.4

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



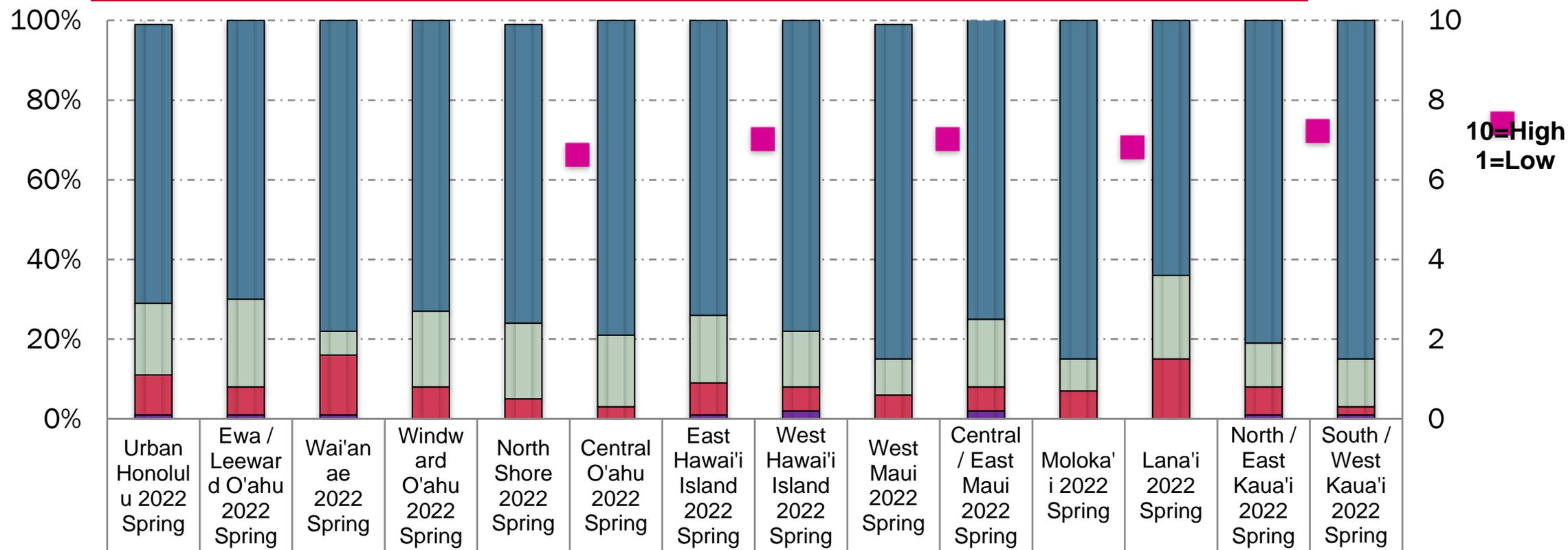
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



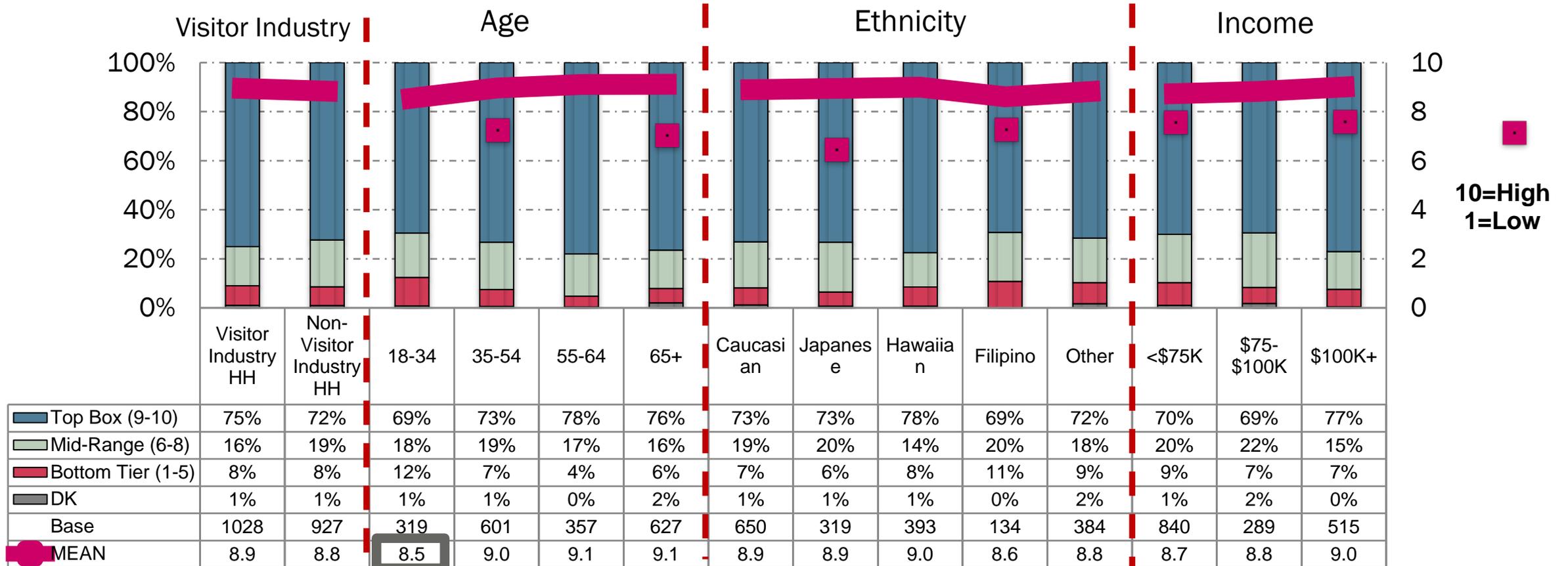
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



	Urban Honolulu 2022 Spring	Ewa / Leeward O'ahu 2022 Spring	Wai'an ae 2022 Spring	Windward O'ahu 2022 Spring	North Shore 2022 Spring	Central O'ahu 2022 Spring	East Hawai'i Island 2022 Spring	West Hawai'i Island 2022 Spring	West Maui 2022 Spring	Central / East Maui 2022 Spring	Moloka'i 2022 Spring	Lana'i 2022 Spring	North / East Kaua'i 2022 Spring	South / West Kaua'i 2022 Spring
■ Top Box (9-10)	70%	70%	78%	73%	75%	79%	74%	78%	84%	76%	85%	64%	81%	85%
■ Mid-Range (6-8)	18%	22%	6%	19%	19%	18%	17%	14%	9%	17%	8%	21%	11%	12%
■ Bottom Tier (1-5)	10%	7%	15%	8%	5%	3%	8%	6%	6%	6%	7%	15%	7%	2%
■ DK/Rf	1%	1%	1%	0%	0	0	1%	2%	0%	2%	0	0	1%	1%
Base	308	154	80	131	80	86	233	225	149	176	62	16	148	107
■ MEAN	8.7	8.9	8.9	8.8	9.0	9.1	8.9	9.1	9.3	9.0	9.3	8.5	9.2	9.4

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



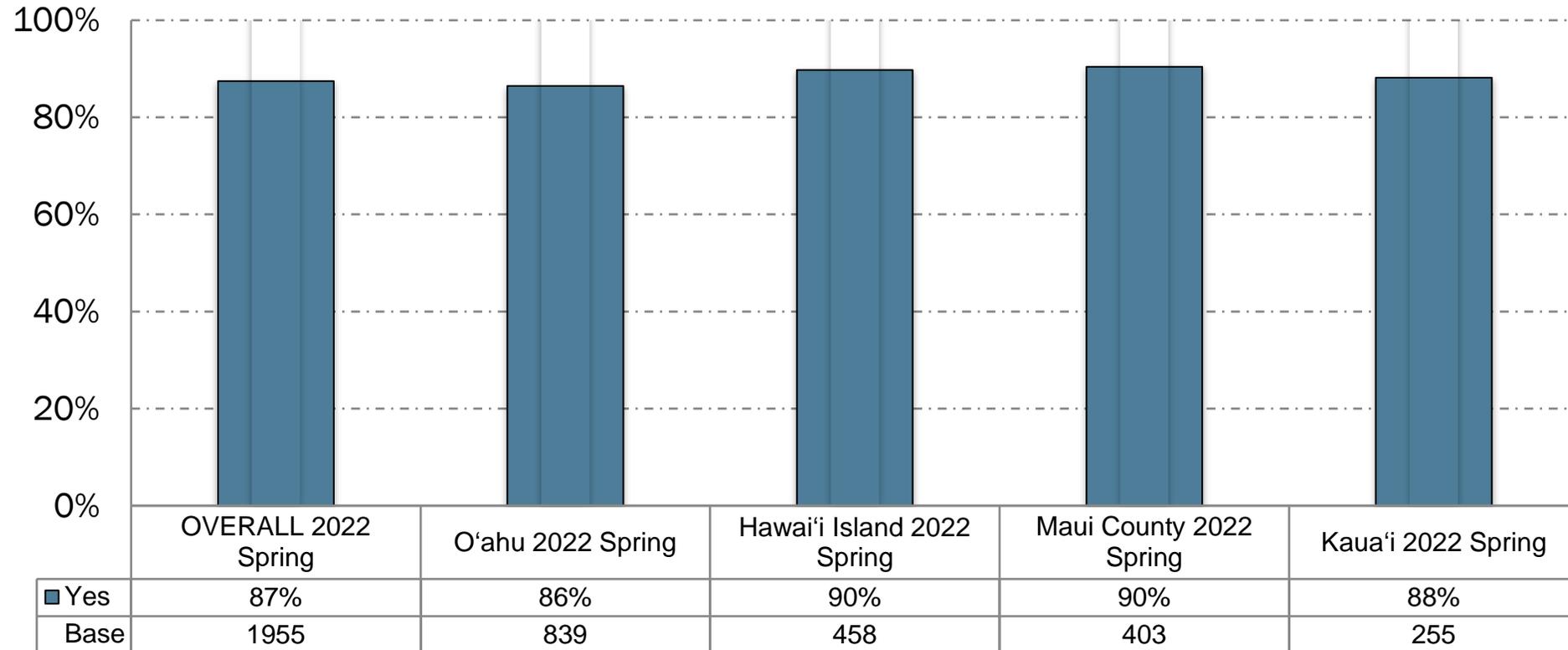
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



Mālama Hawai‘i program (Spring 2022)

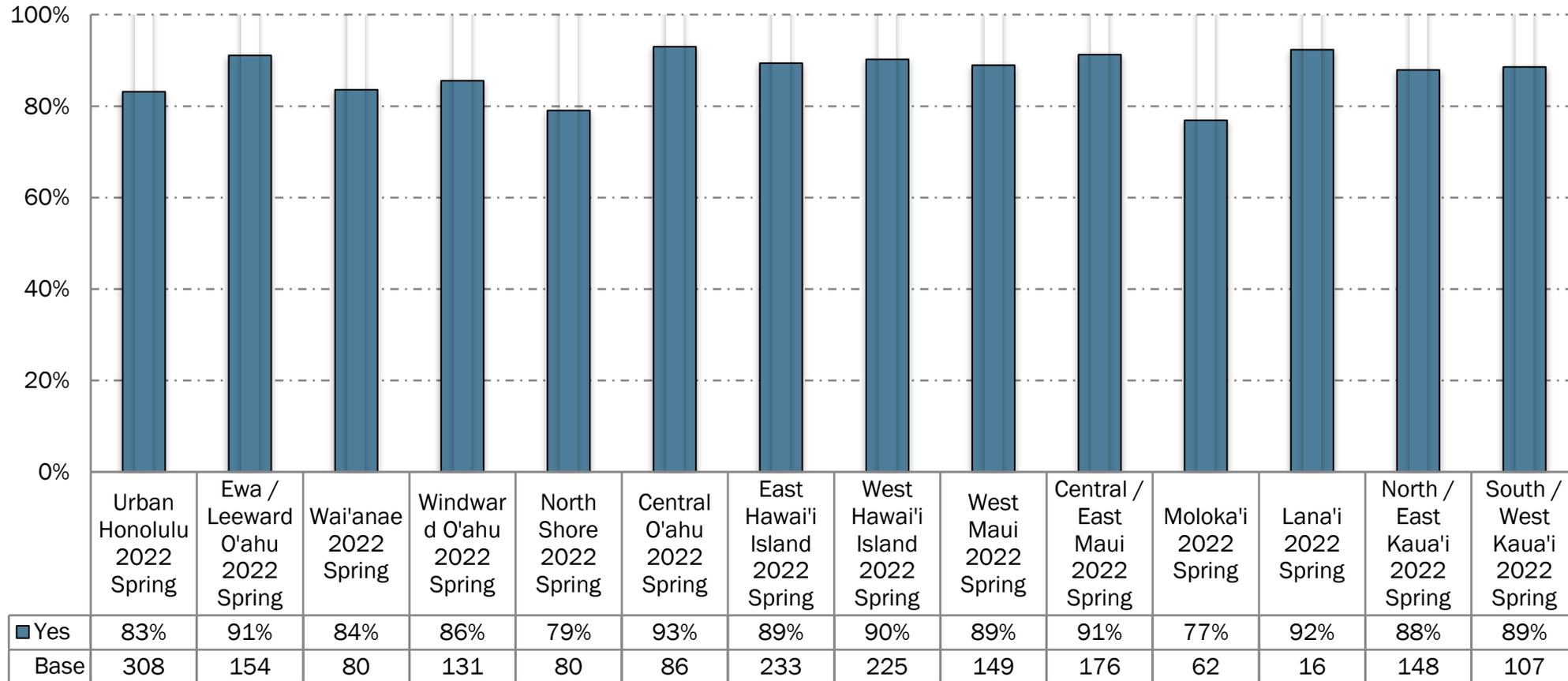
Mālama Hawai‘i: Support for visitors engaging in volunteer projects

– *By Island*



Q8. As the Hawai‘i Tourism Authority implements its “Mālama Hawai‘i” program, which allows visitors to give back during their Hawai‘i visit, do you support visitors engaging in volunteer projects on your island?

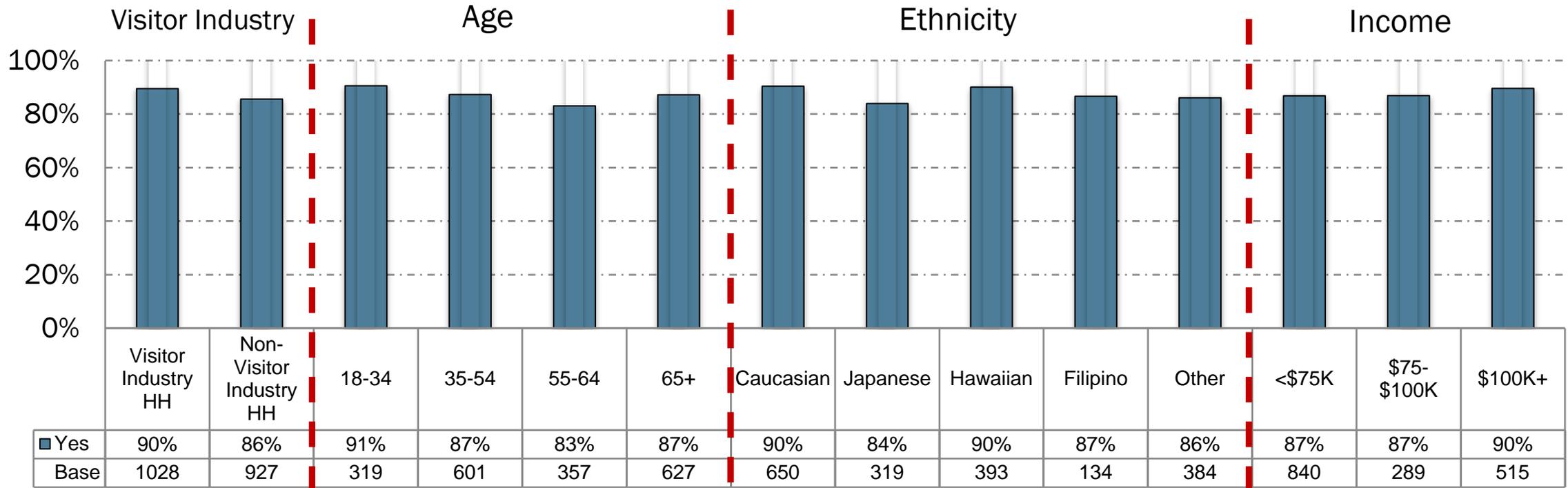
Mālama Hawai‘i: Support for visitors engaging in volunteer projects - *By Area*



Q8. As the Hawai‘i Tourism Authority implements its “Mālama Hawai‘i” program, which allows visitors to give back during their Hawai‘i visit, do you support visitors engaging in volunteer projects on your island?

Mālama Hawai‘i: Support for visitors engaging in volunteer projects

– *By Demographics*

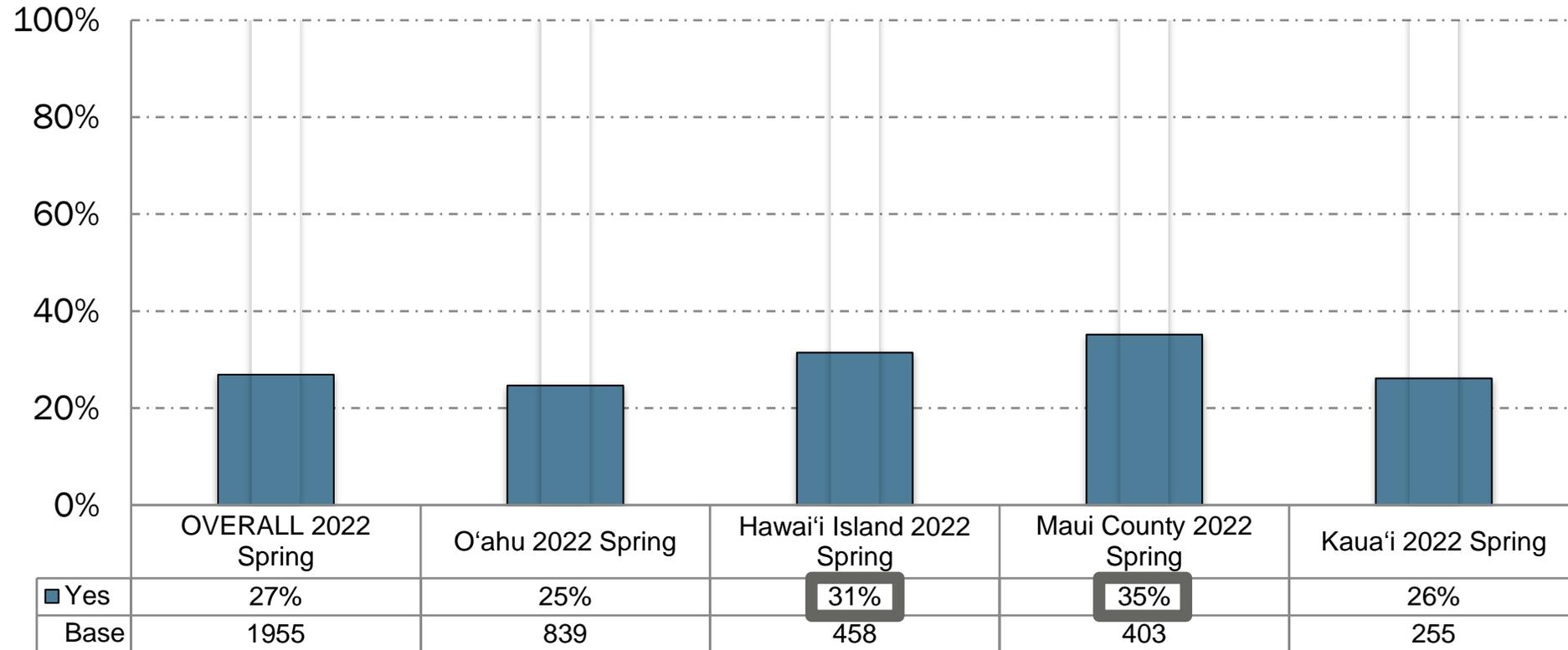


Q8. As the Hawai‘i Tourism Authority implements its “Mālama Hawai‘i” program, which allows visitors to give back during their Hawai‘i visit, do you support visitors engaging in volunteer projects on your island?



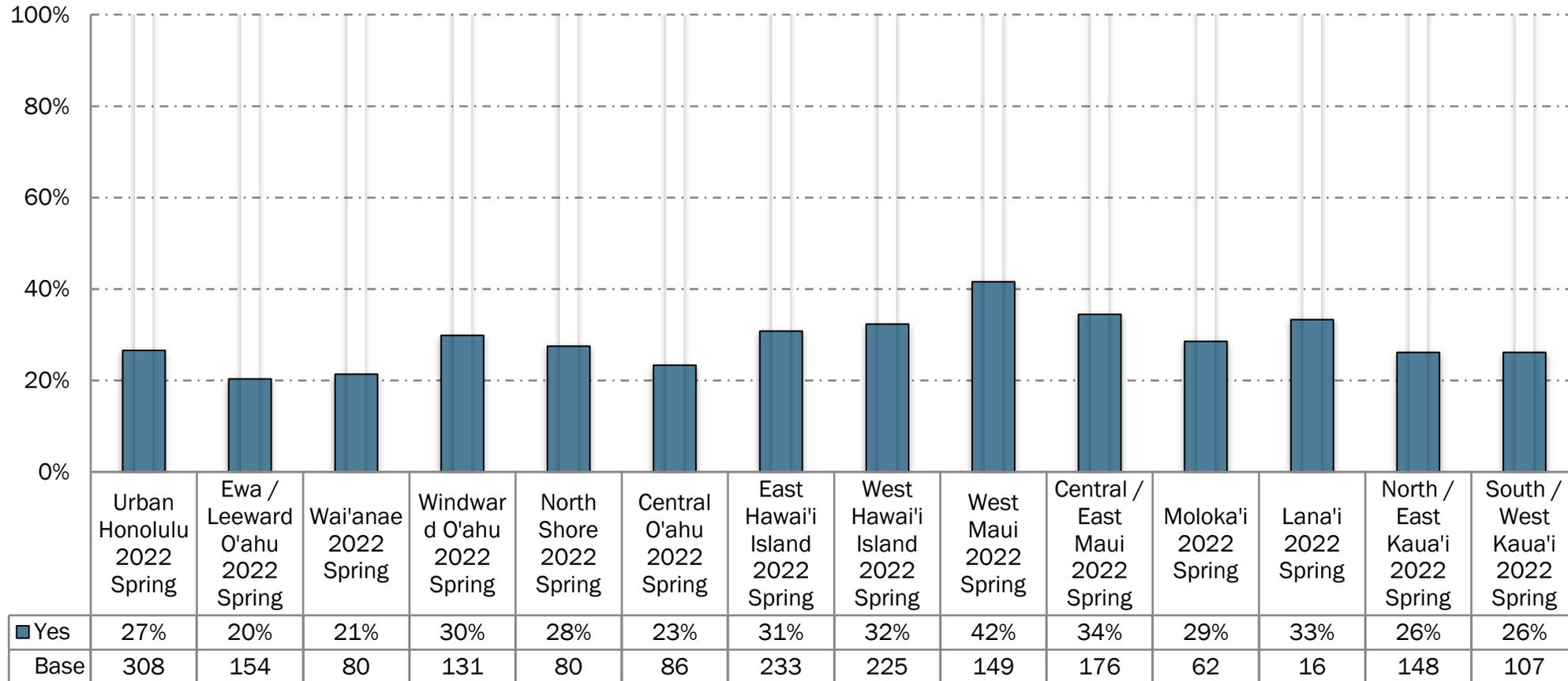
Destination Management / Managed Tourism (Spring 2022)

“Destination Management” or “Managed Tourism?” – *By Island*



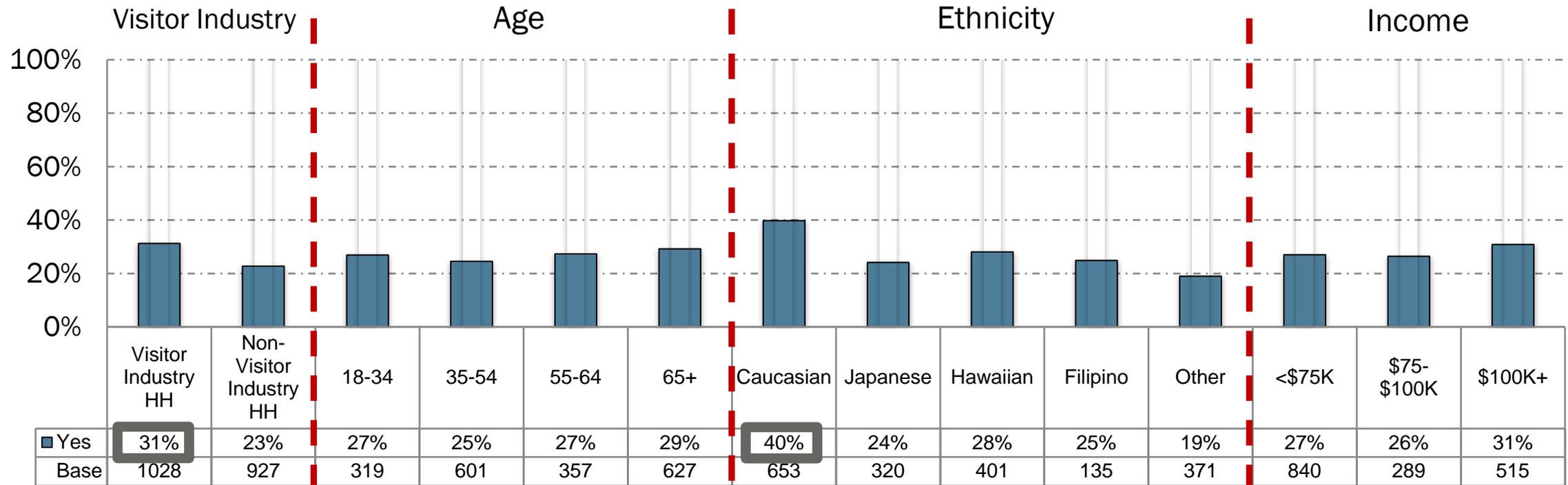
Q9. Have you ever heard of “Destination Management” or “Managed Tourism?”

“Destination Management” or “Managed Tourism?” - *By Area*



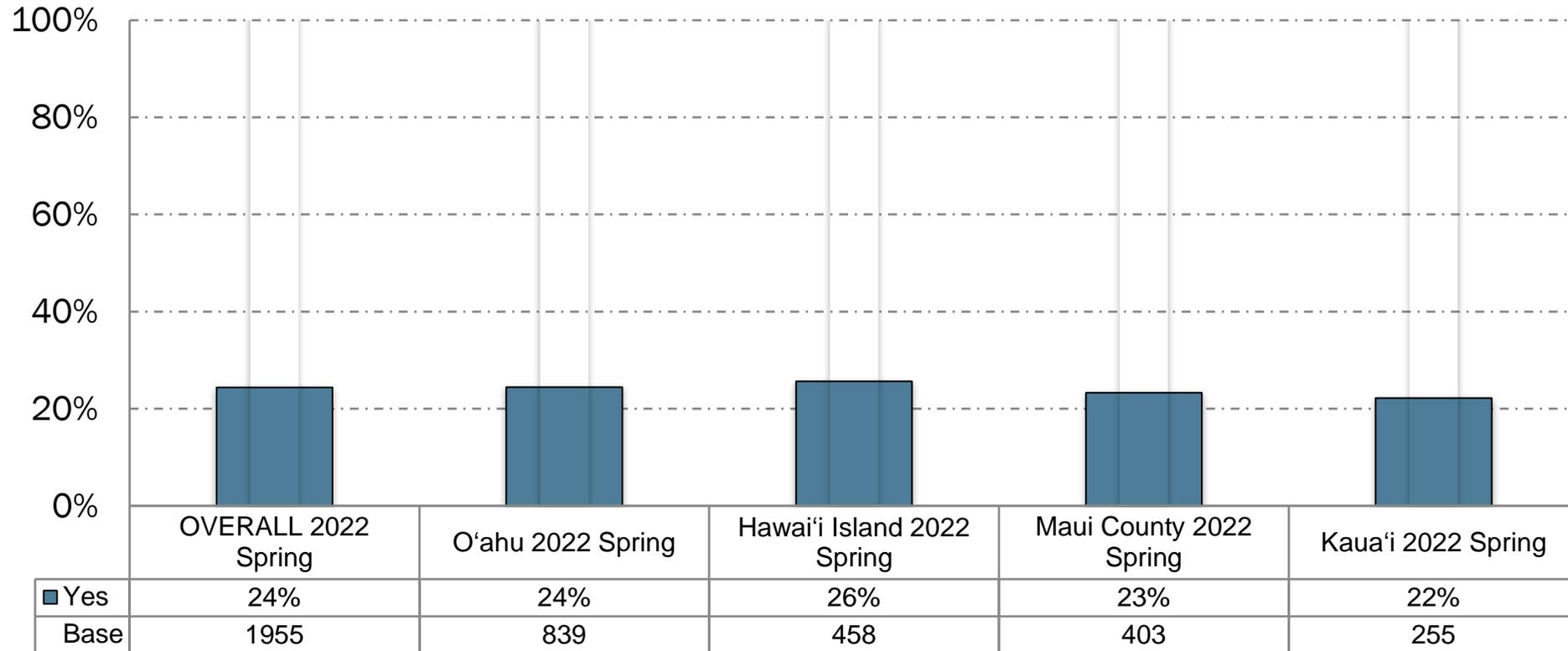
Q9. Have you ever heard of “Destination Management” or “Managed Tourism?”

“Destination Management” or “Managed Tourism?” – *By Demographics*



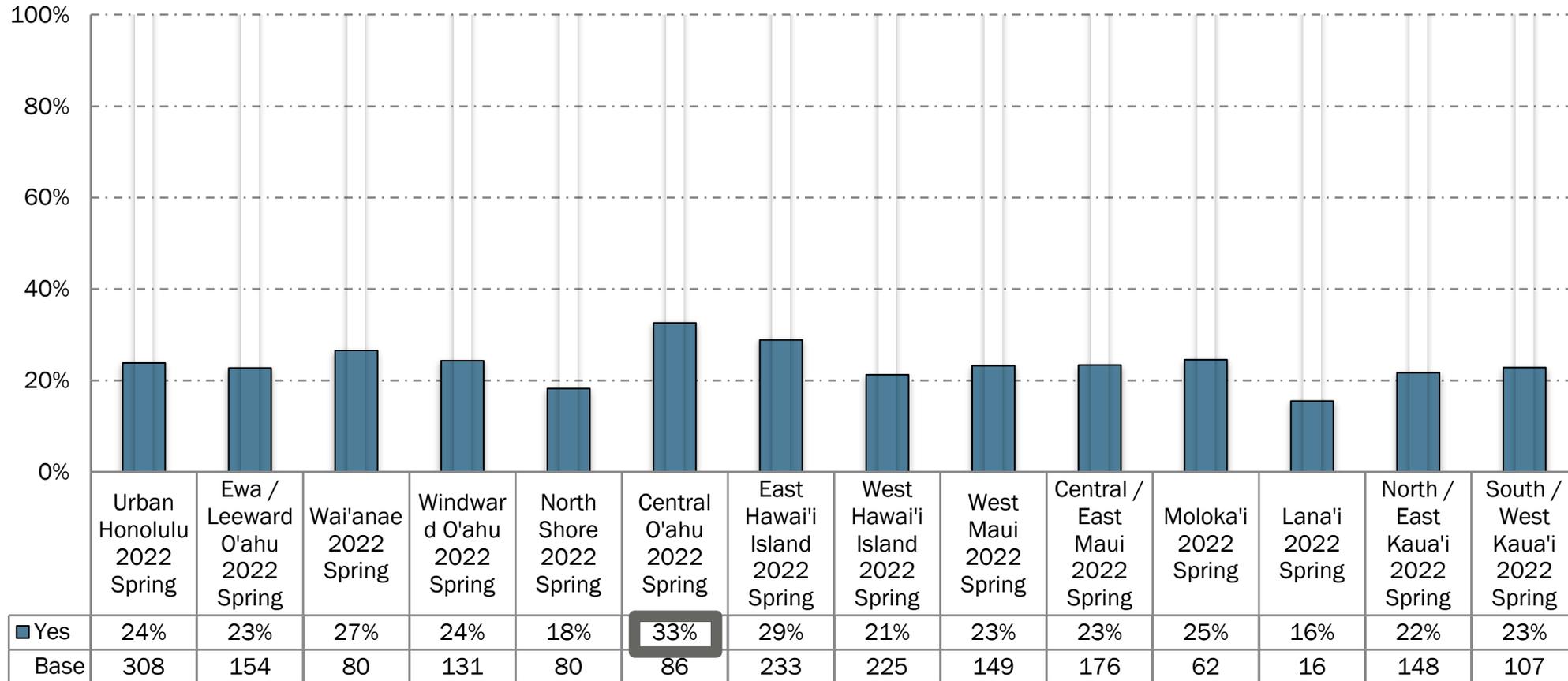
Q9. Have you ever heard of “Destination Management” or “Managed Tourism?”

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



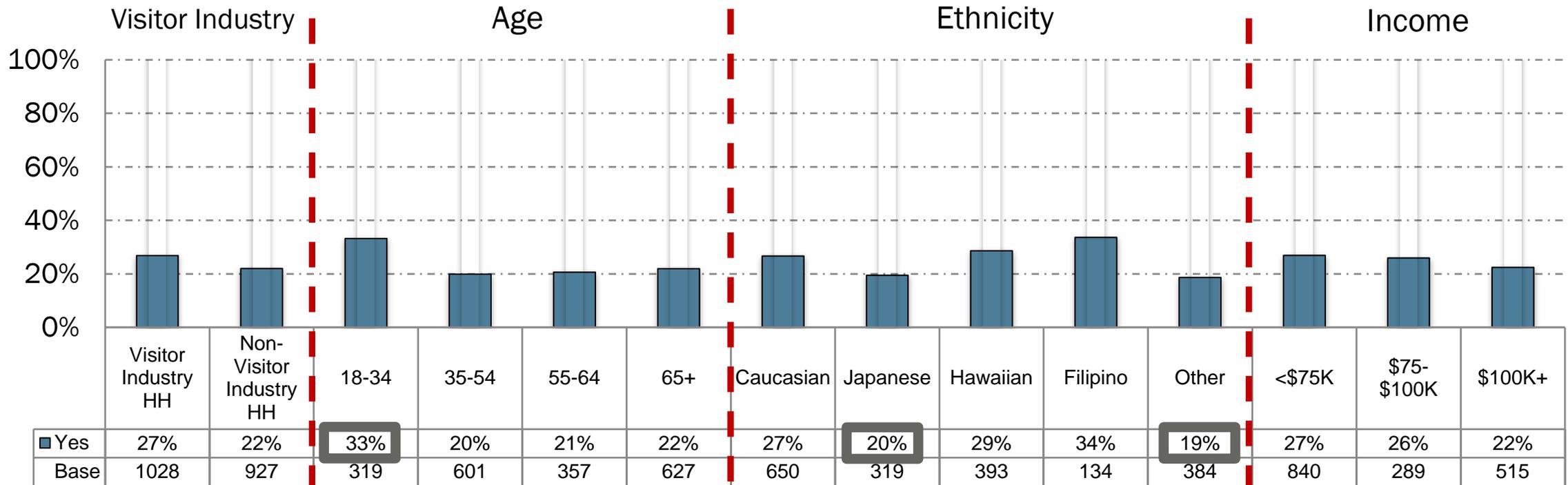
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

“Aware of Hawai‘i’s “Destination Management Action Plans (DMAP)” - *By Area*



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*

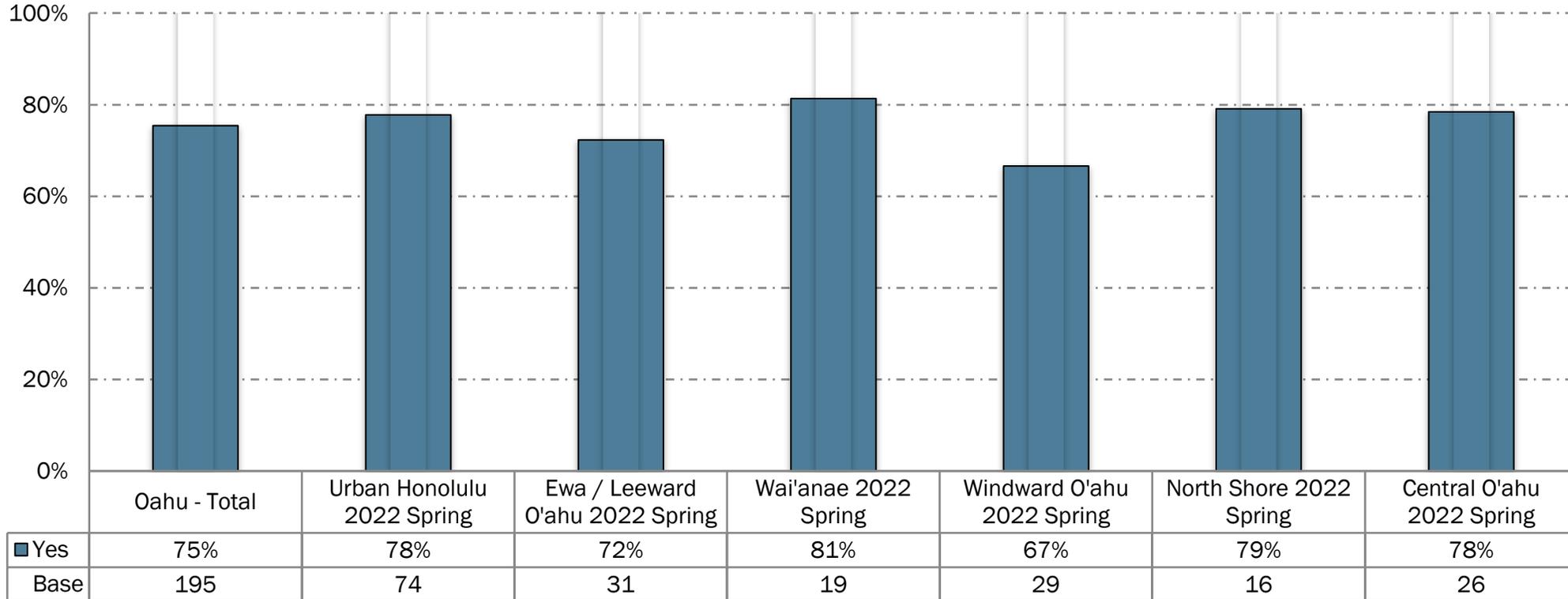


Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?



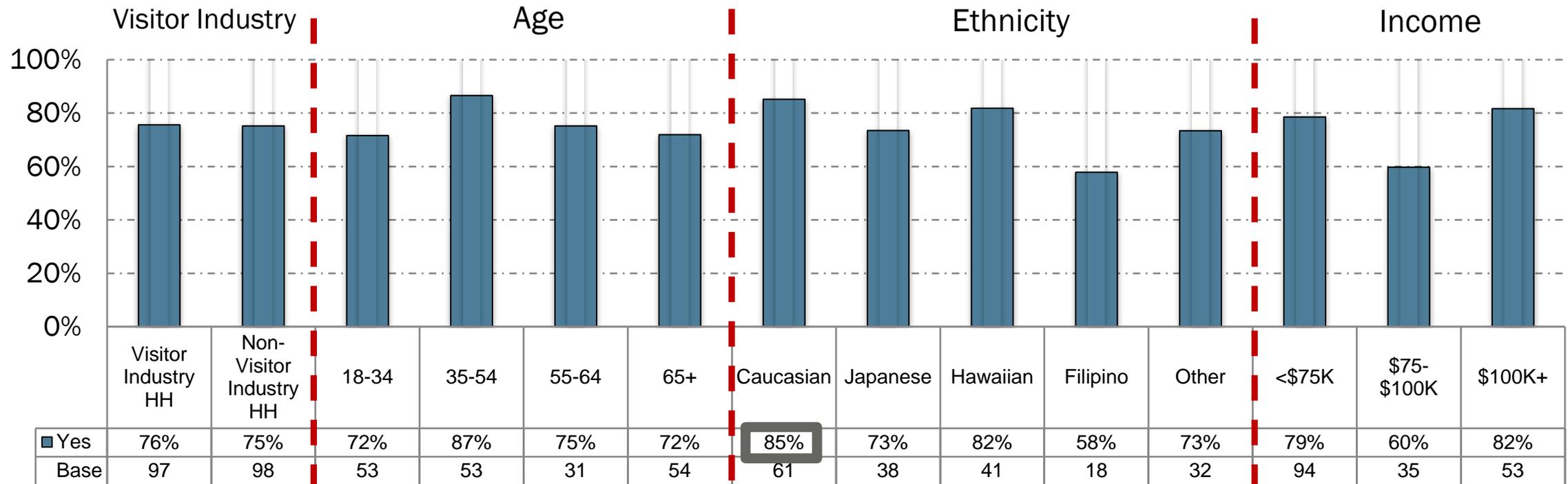
Hawai‘i Tourism Authority’s Destination Management Action Plan: O‘ahu (Spring 2022)

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



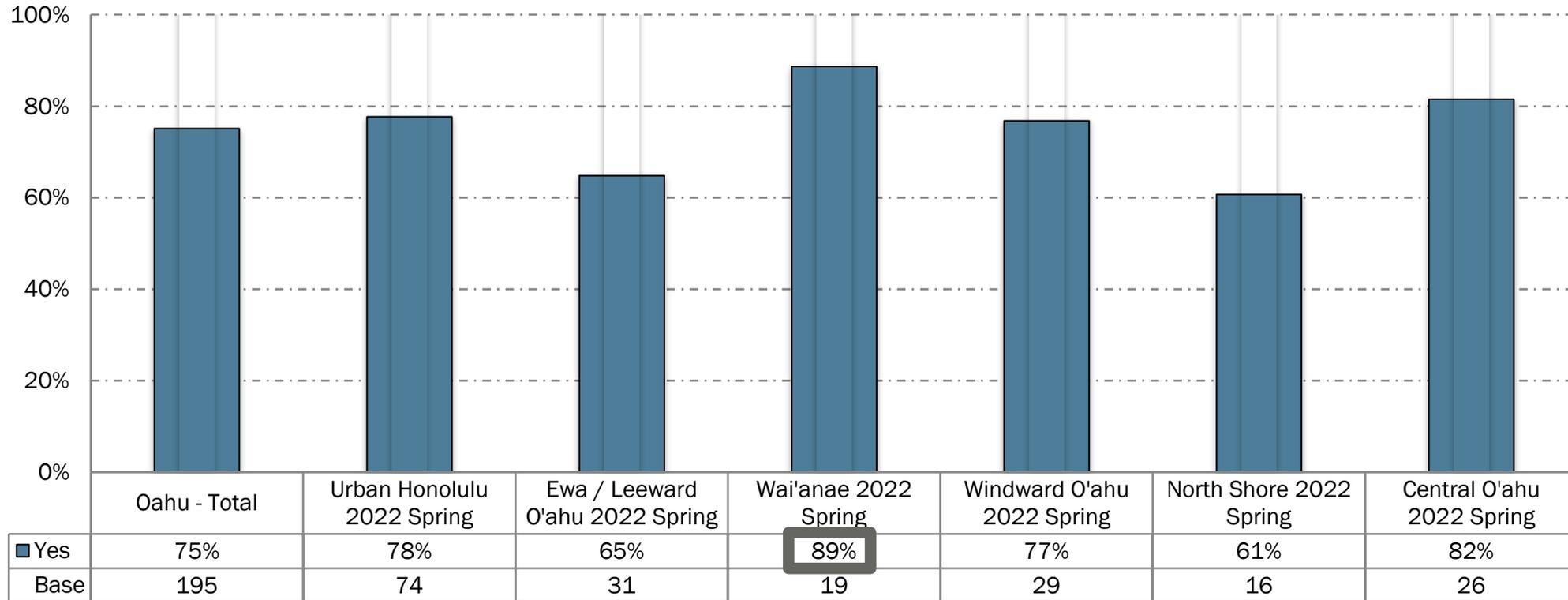
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Implement a pre- and post-arrival visitor communications program to encourage respectful and supportive visitor behavior.” – *By Demographics*



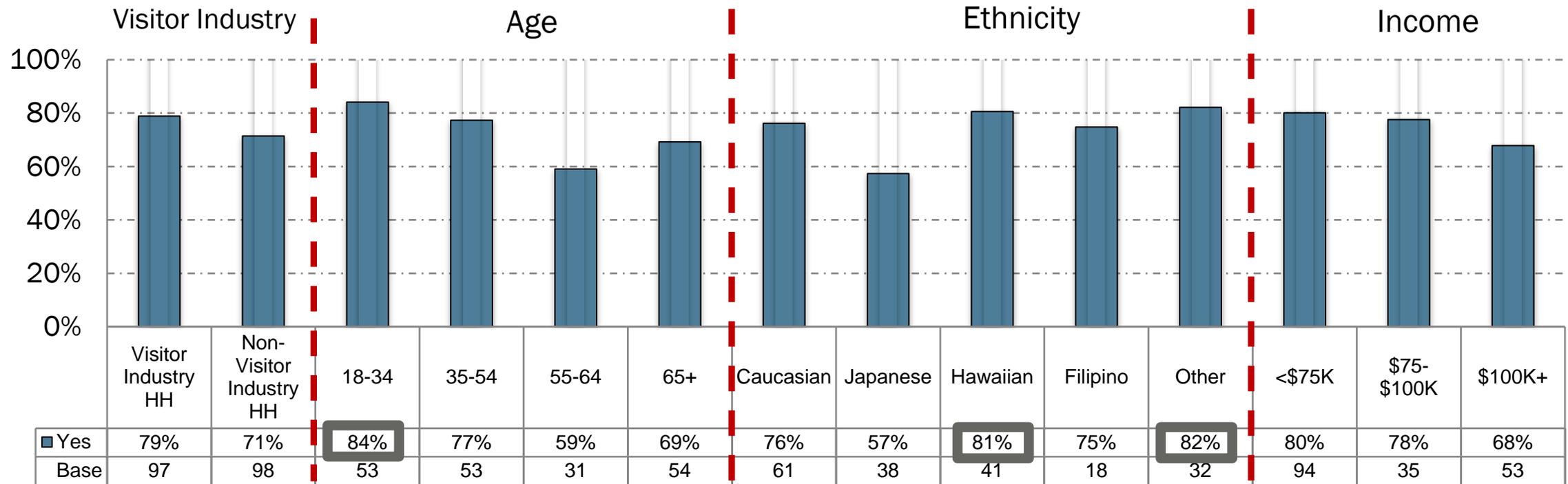
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



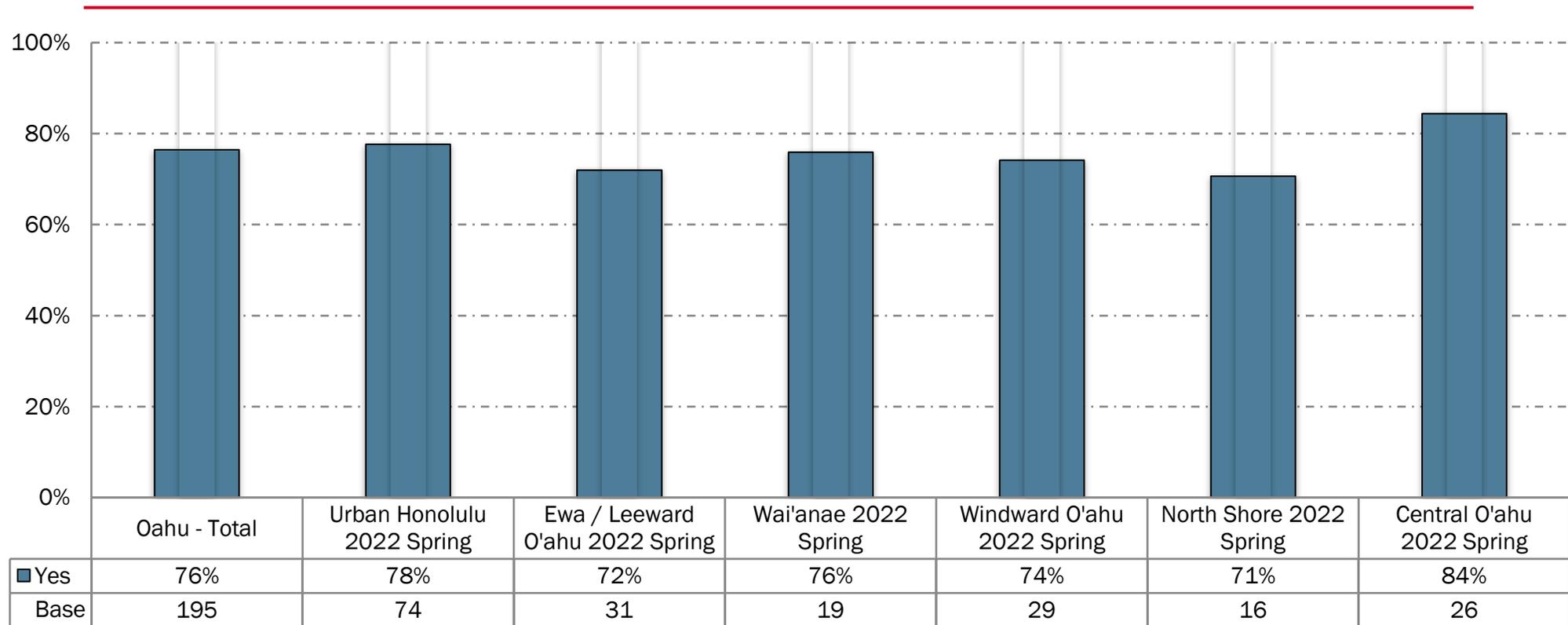
Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



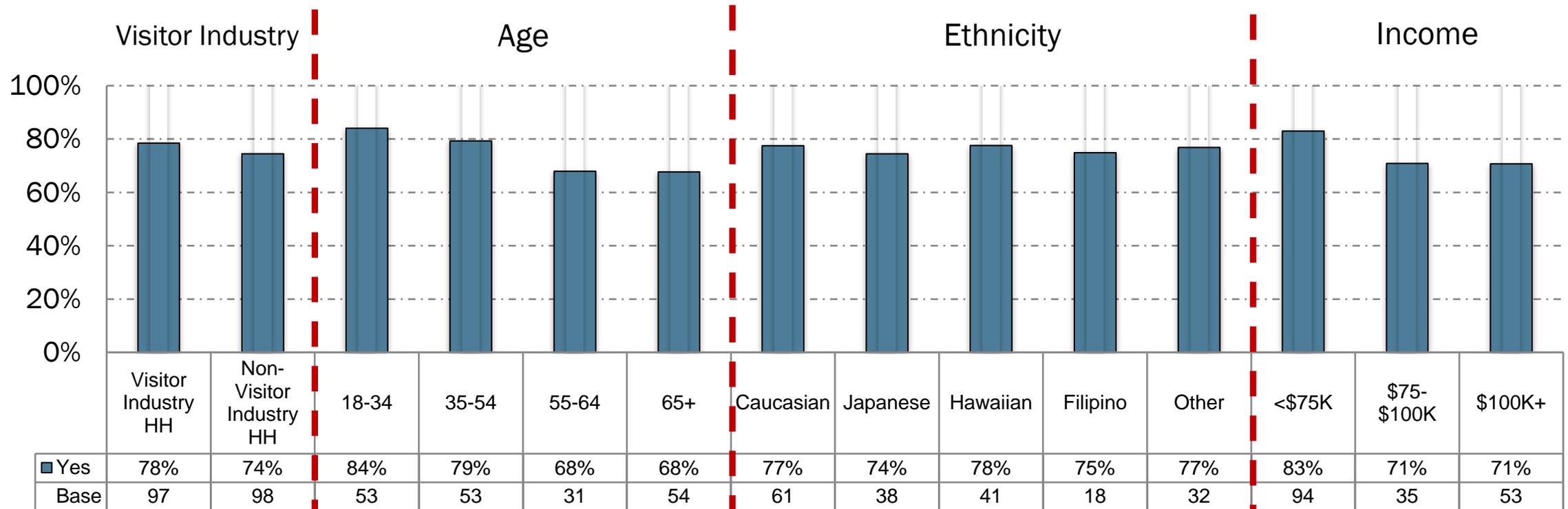
Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“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:

“Work with community partners to develop, market and support more collaborative, curated experiences that enrich the lives of residents and visitors alike.” – *By Demographics*



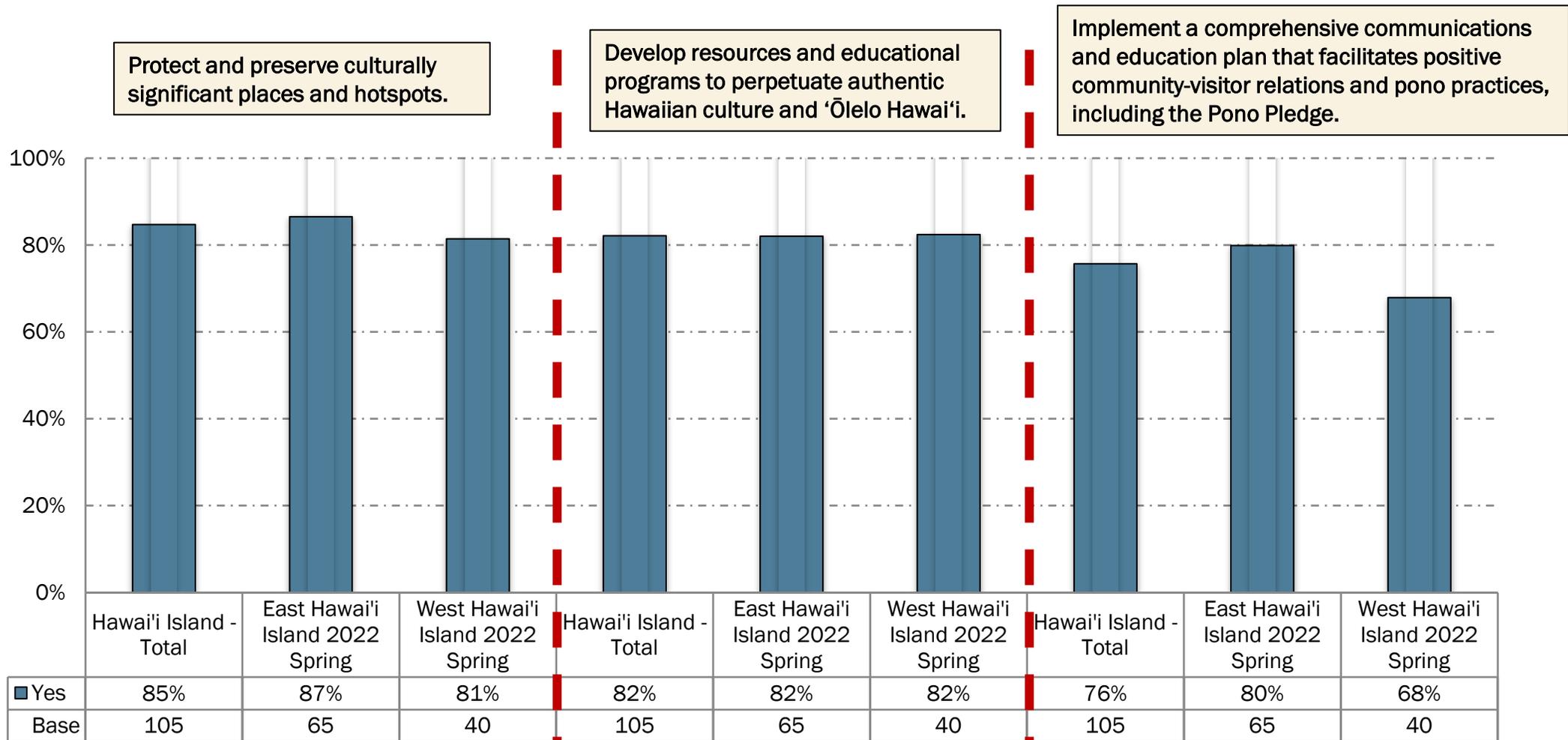
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



Hawai‘i Tourism Authority’s Destination Management Action Plan: Hawai‘i Island (Spring 2022)

Hawaii Tourism Authority's Destination Management Action Plan

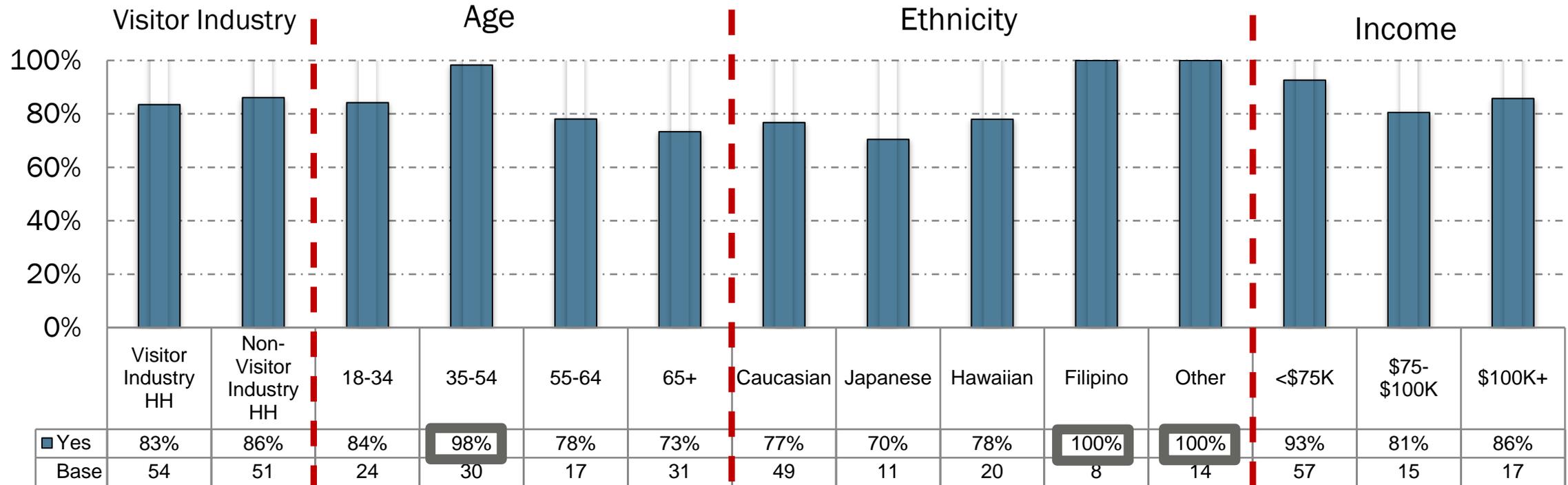
- *By Hawai'i Island Area*



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:

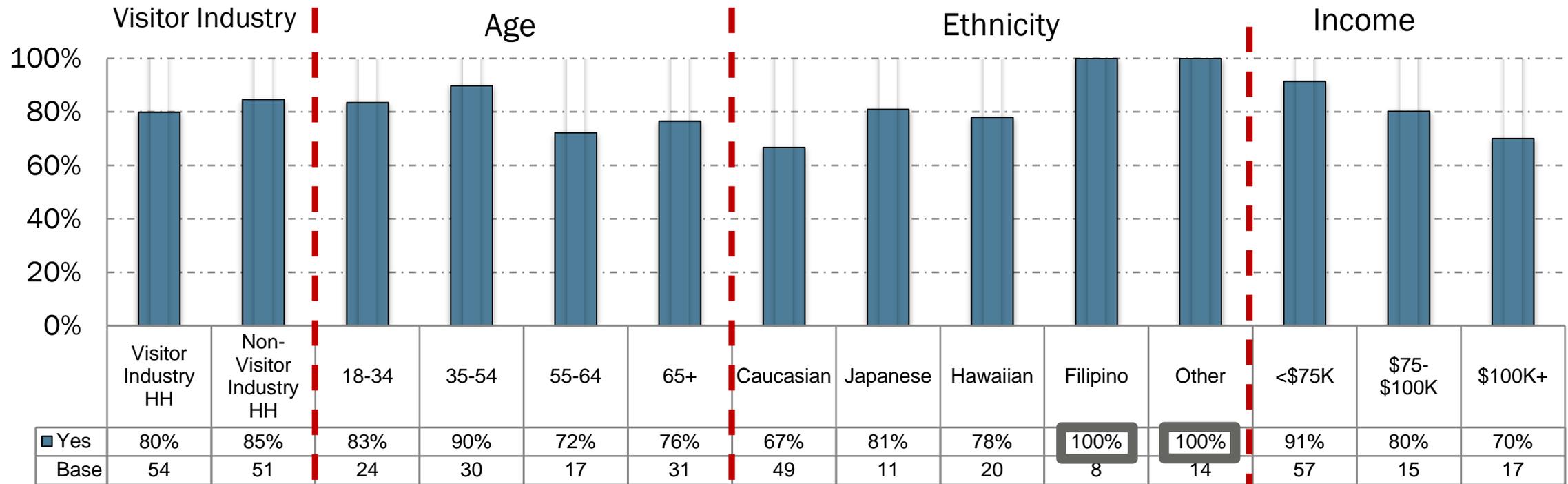
“Protect and preserve culturally significant places and hotspots.”

– *By Demographics*



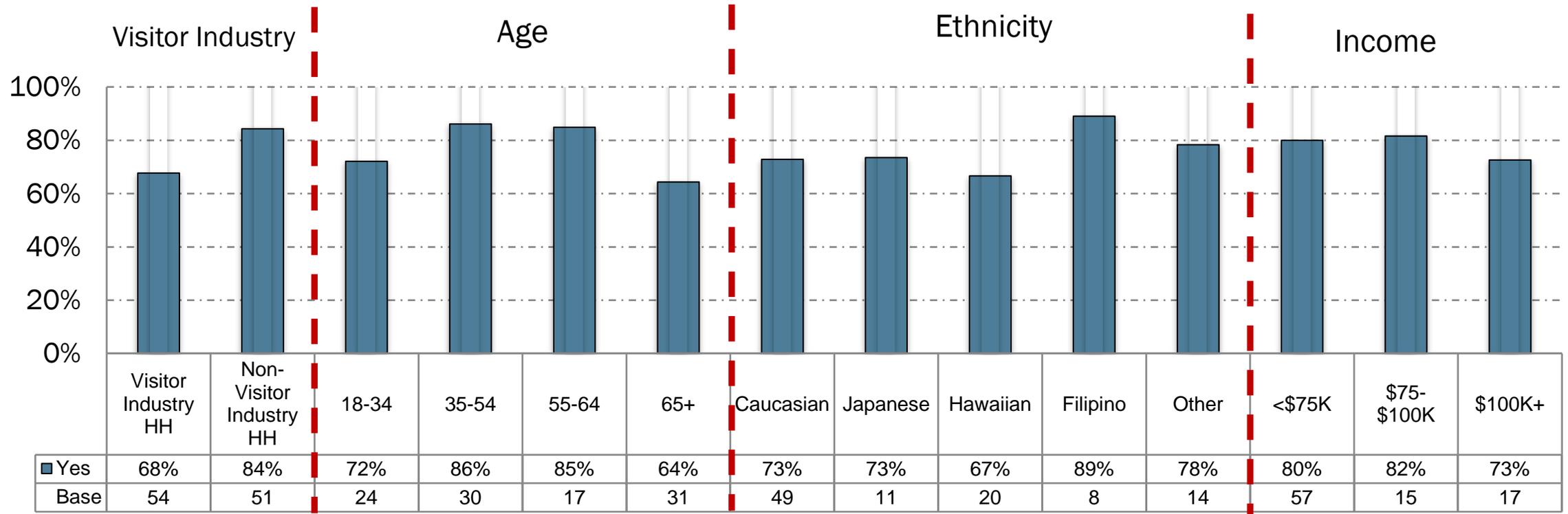
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Develop resources and educational programs to perpetuate authentic Hawaiian culture and ‘Ōlelo Hawai‘i.” – *By Demographics*



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:

“Implement a comprehensive communications and education plan that facilitates positive community-visitor relations and pono practices, including the Pono Pledge.” – *By Demographics*



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 (Spring 2022)

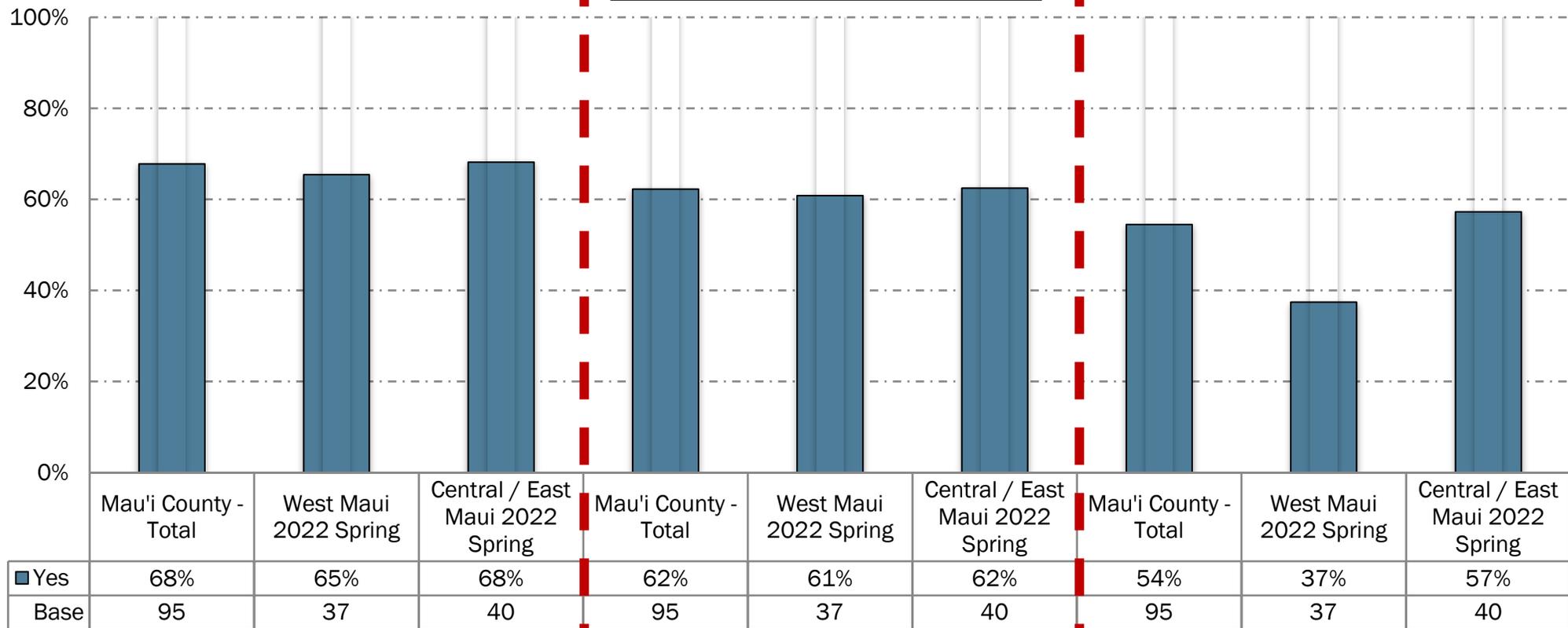
Hawaii Tourism Authority's Destination Management Action Plan

- *By Maui Island Area*

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

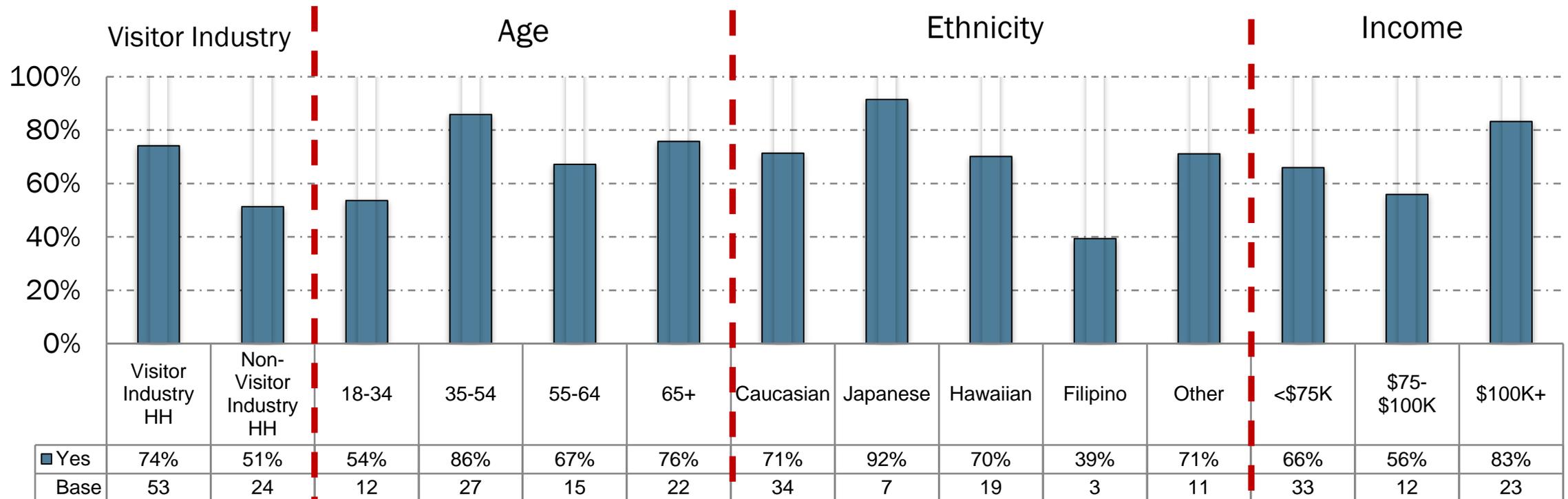
Continue to offer cultural education and training programs to enhance and perpetuate aloha, mālama and kuleana, and the authentic Hawai'i experience.

Develop Regenerative Tourism initiatives.



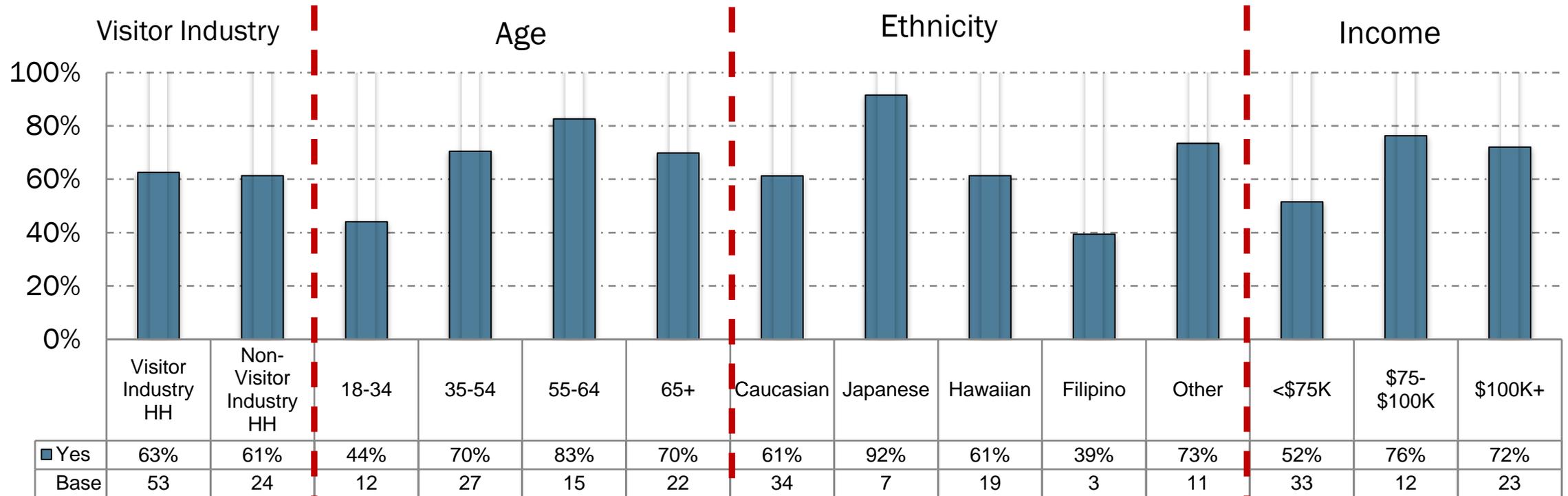
“Implement a responsible tourism marketing communications program to educate visitors pre- and post-arrival about safe and respectful travel.”

– *By Demographics*



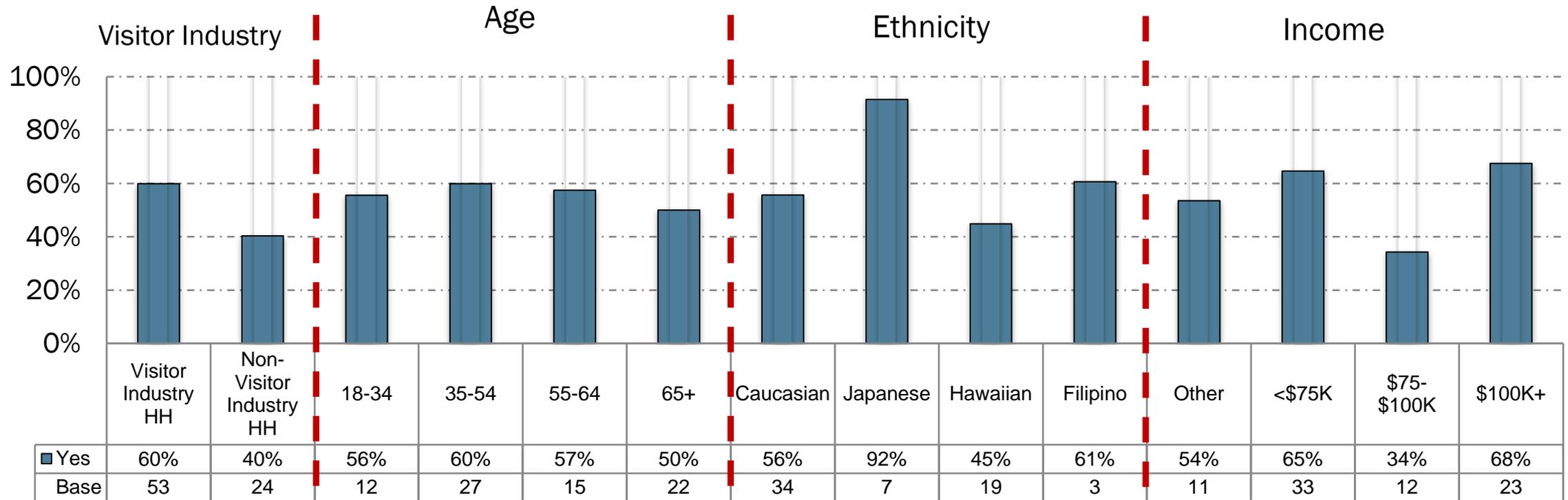
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Continue to offer cultural education and training programs to enhance and perpetuate aloha, mālama and kuleana, and the authentic Hawai‘i experience.” – *By Demographics*



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:

“Develop Regenerative Tourism initiatives.” – *By Demographics*



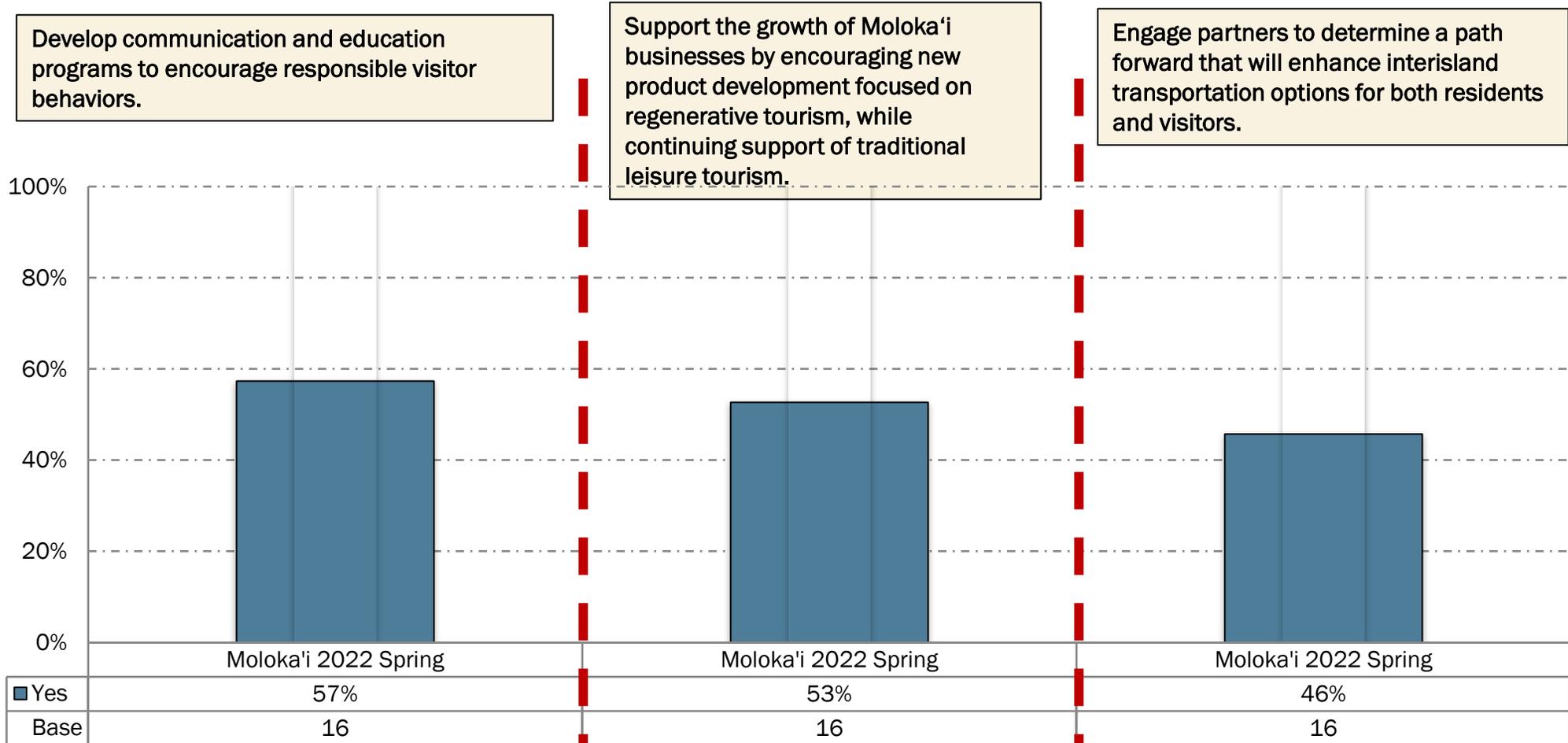
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



Hawai‘i Tourism Authority’s Destination Management Action Plan: Moloka‘i (Spring 2022)

Hawaii Tourism Authority's Destination Management Action Plan

- *By Moloka'i Island Area*



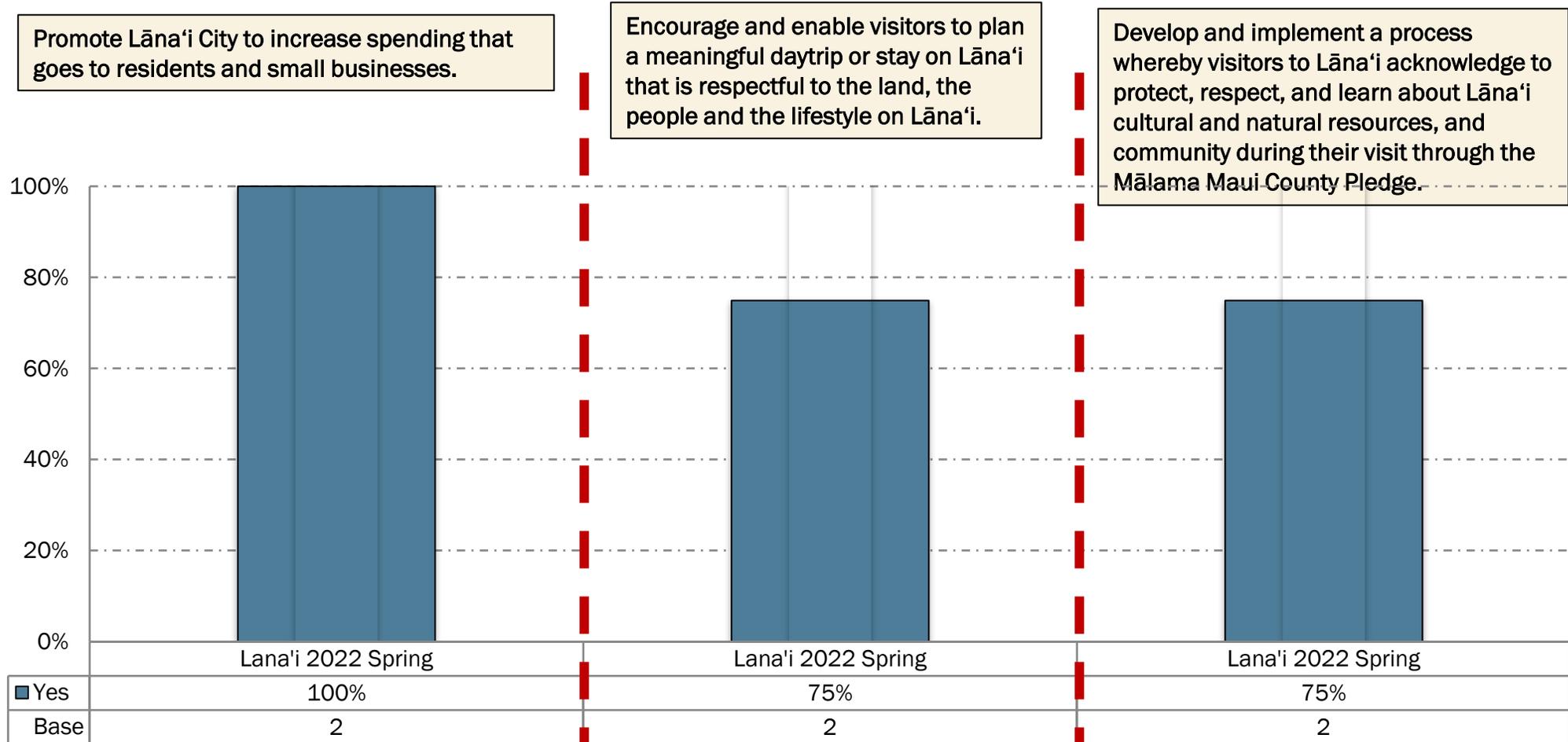
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



Hawai‘i Tourism Authority’s Destination Management Action Plan: Lāna‘i (Spring 2022)

Hawaii Tourism Authority's Destination Management Action Plan

- *By Lānaʻi Island Area*



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.

Base Counts are weighted by Age and Ethnicity

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: Kaua‘i (Spring 2022)

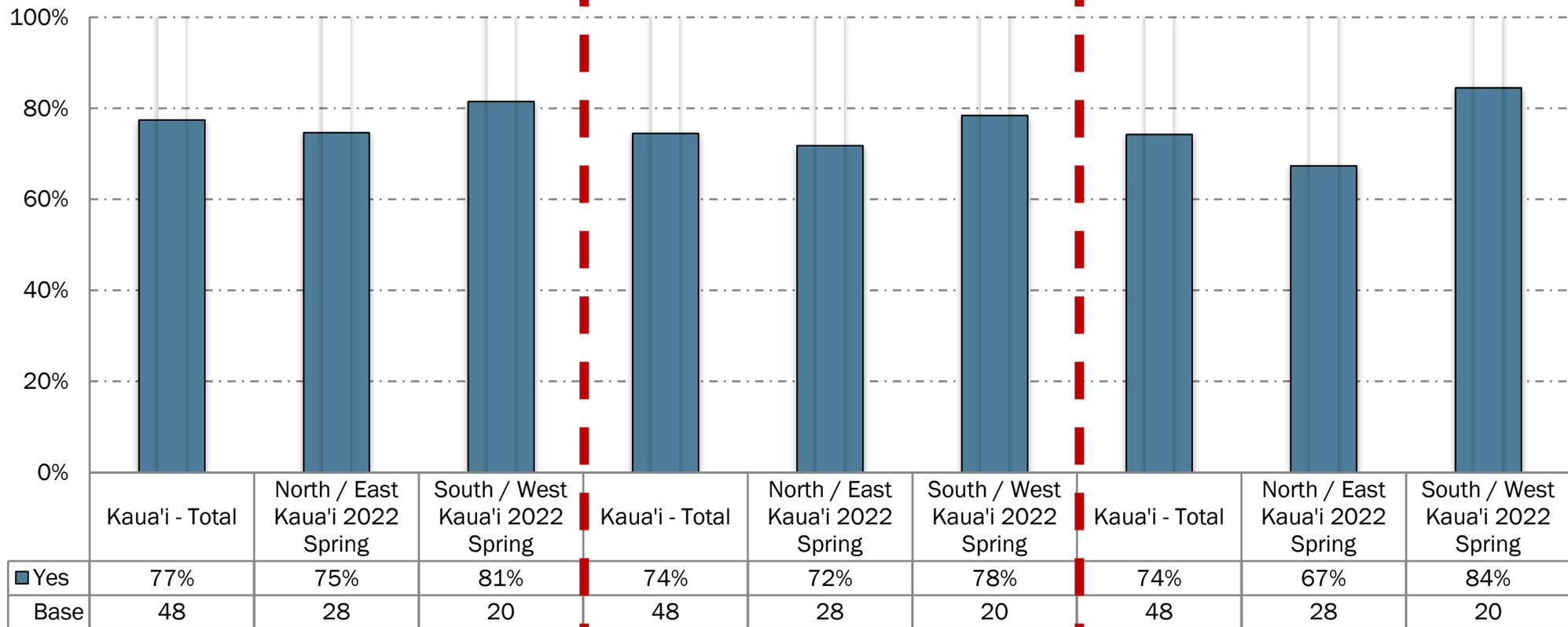
Hawaii Tourism Authority's Destination Management Action Plan

- *By 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).

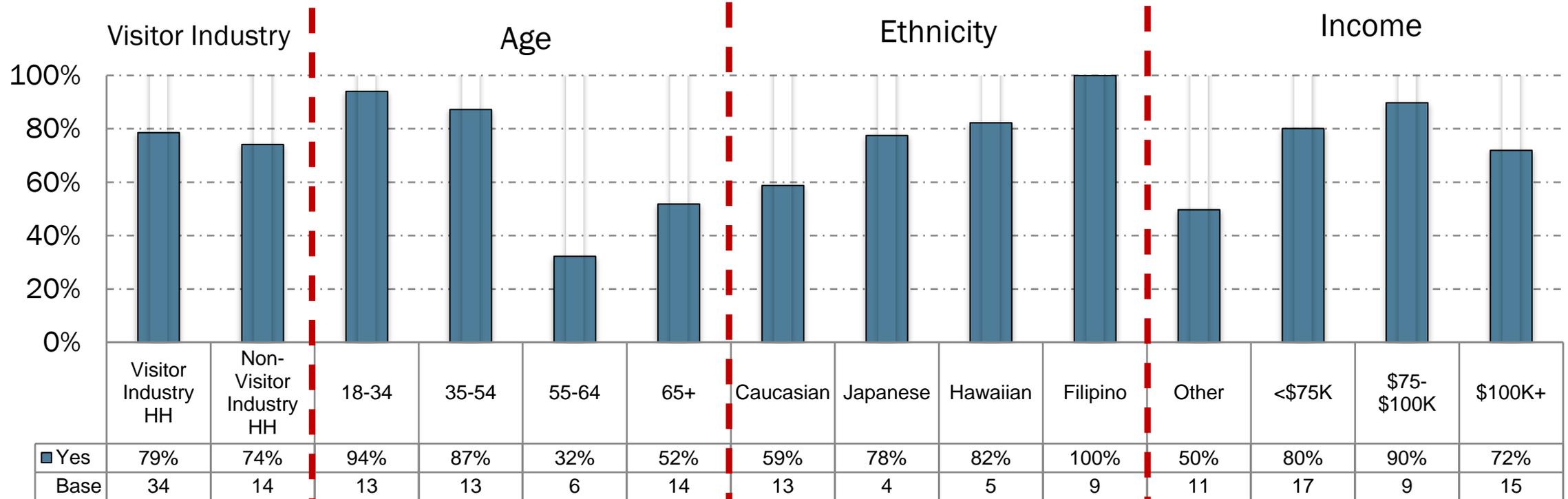
Focus policies that address overtourism by managing people while on Kaua'i.

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



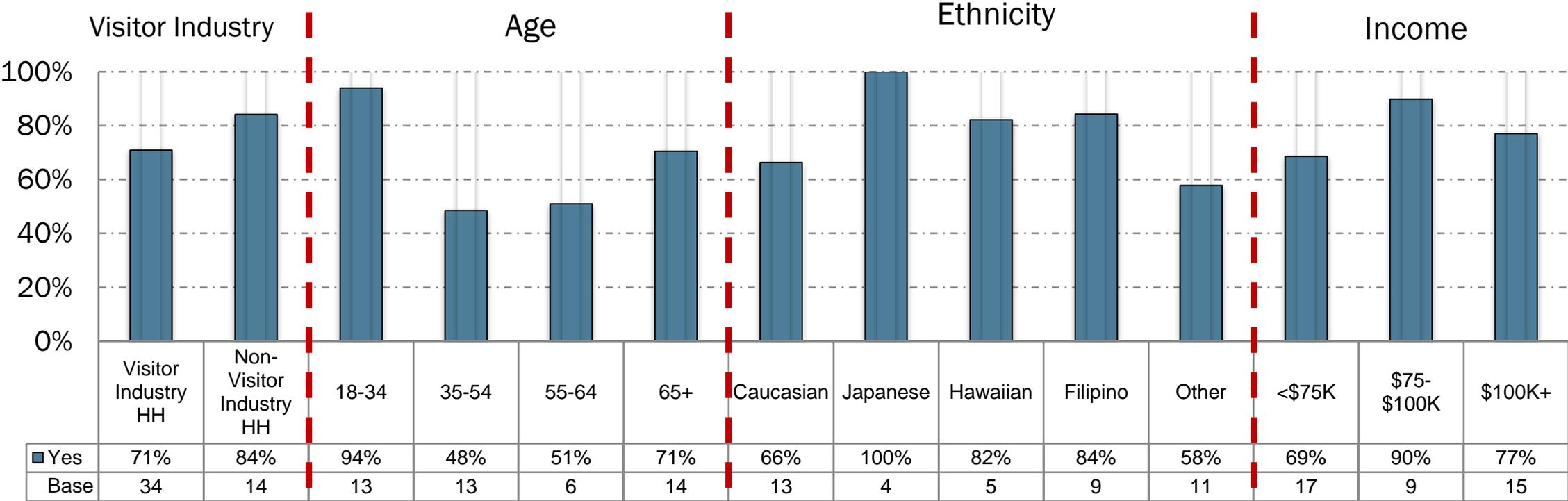
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



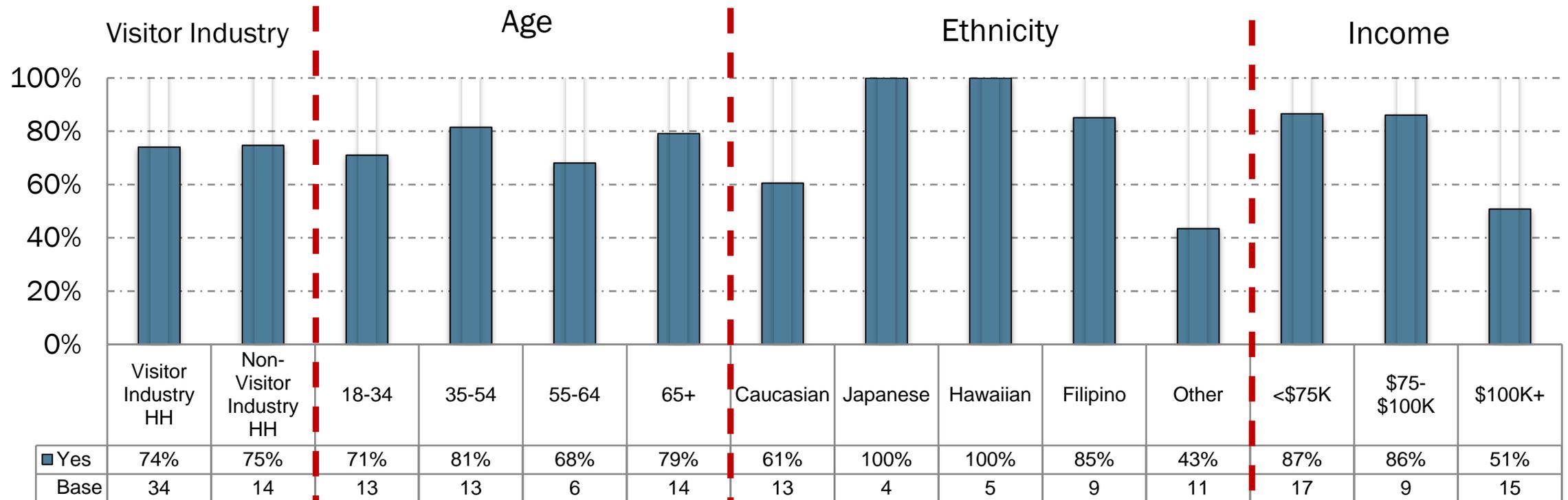
Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

“Focus policies that address overtourism by managing people while on Kaua‘i.” – *By Demographics*



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:

“Develop educational materials for visitors and new residents to have respect for our local cultural values.” – *By Demographics*

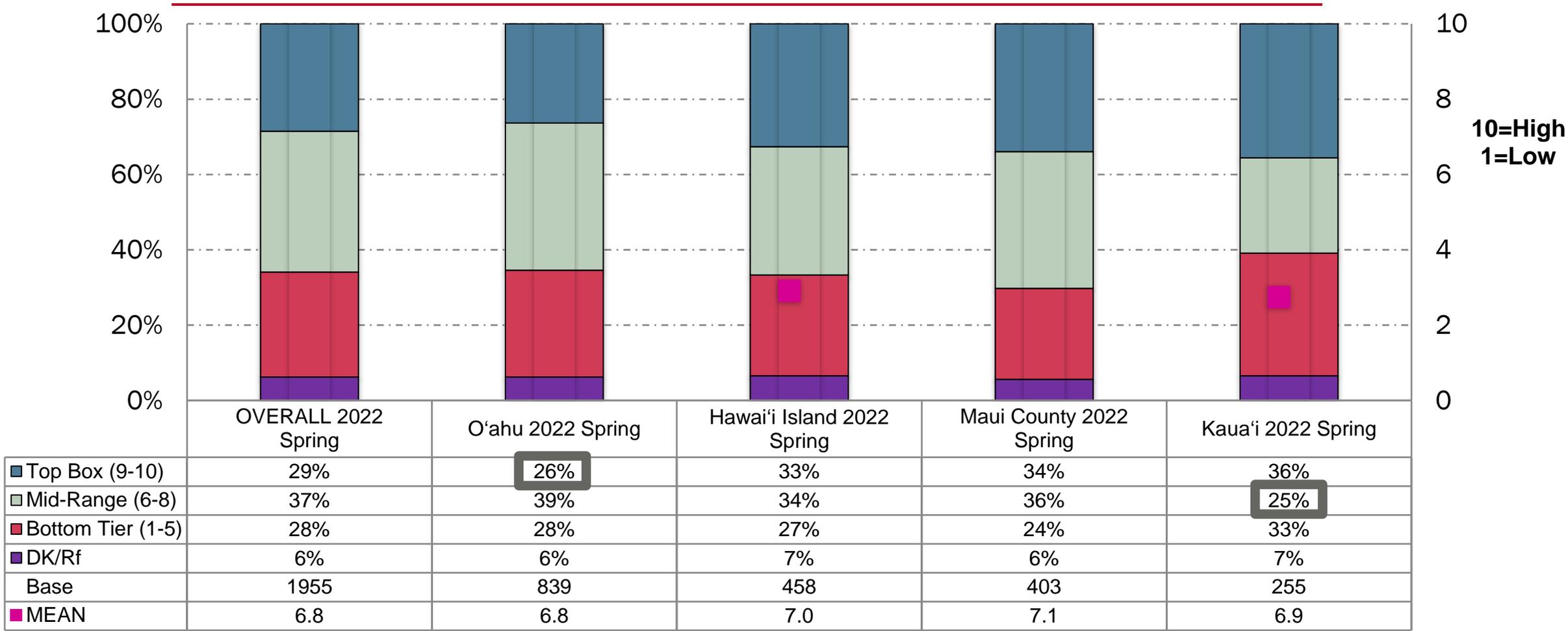


Q10a. I’m going to read you a brief list of actions included in the Hawai’i Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



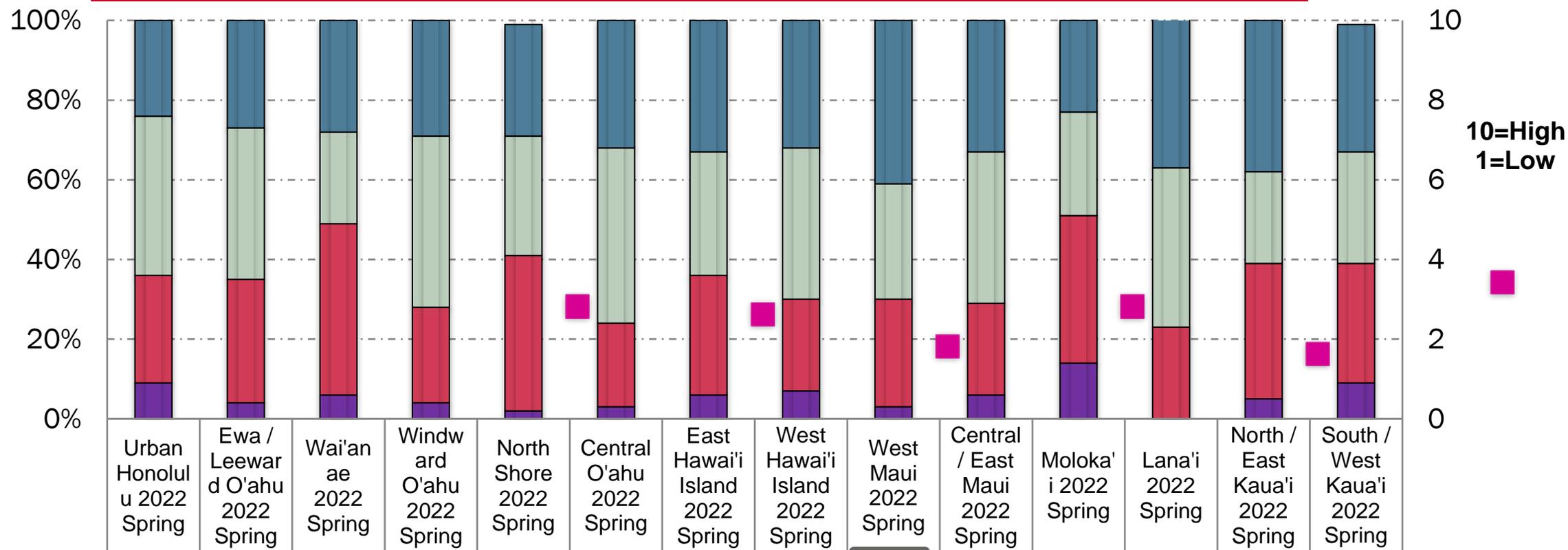
Tax Revenues for Managed Tourism (Spring 2022)

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



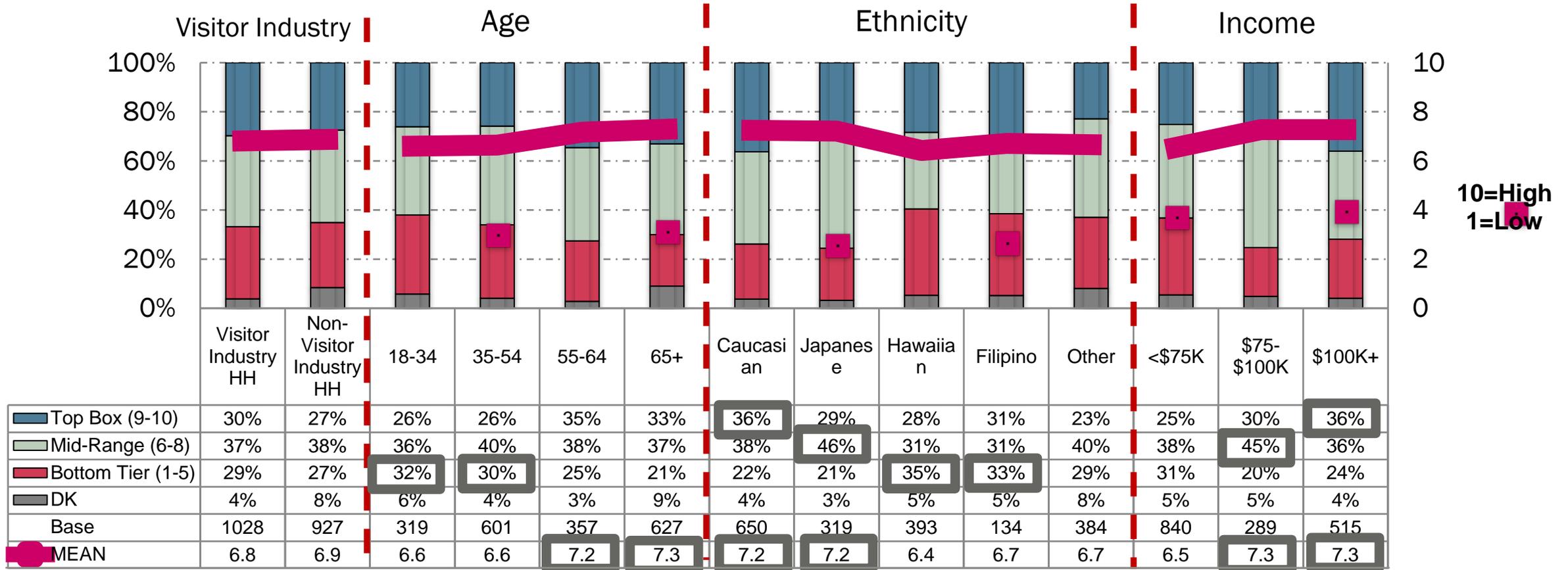
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

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



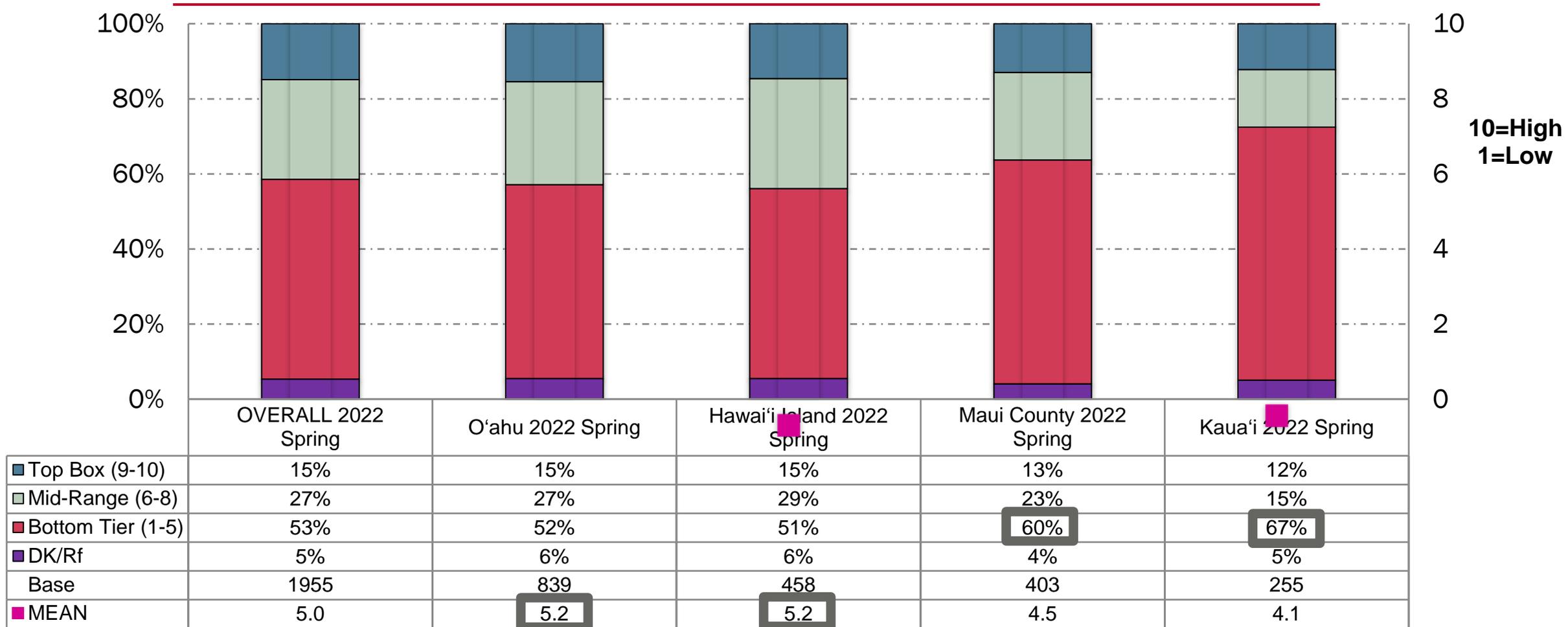
	Urban Honolulu 2022 Spring	Ewa / Leeward O'ahu 2022 Spring	Wai'an ae 2022 Spring	Windward O'ahu 2022 Spring	North Shore 2022 Spring	Central O'ahu 2022 Spring	East Hawai'i Island 2022 Spring	West Hawai'i Island 2022 Spring	West Maui 2022 Spring	Central / East Maui 2022 Spring	Moloka'i 2022 Spring	Lana'i 2022 Spring	North / East Kaua'i 2022 Spring	South / West Kaua'i 2022 Spring
■ Top Box (9-10)	24%	27%	28%	29%	28%	32%	33%	32%	41%	33%	23%	38%	38%	32%
■ Mid-Range (6-8)	40%	38%	23%	43%	30%	44%	31%	38%	29%	38%	26%	40%	23%	28%
■ Bottom Tier (1-5)	27%	31%	43%	24%	39%	21%	30%	23%	27%	23%	37%	23%	34%	30%
■ DK/Rf	9%	4%	6%	4%	2%	3%	6%	7%	3%	6%	14%	0	5%	9%
Base	308	154	80	131	80	86	233	225	149	176	62	16	148	107
■ MEAN	6.8	6.7	6.3	6.8	6.2	7.1	6.9	7.2	7.1	7.1	5.9	7.4	6.9	6.9

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



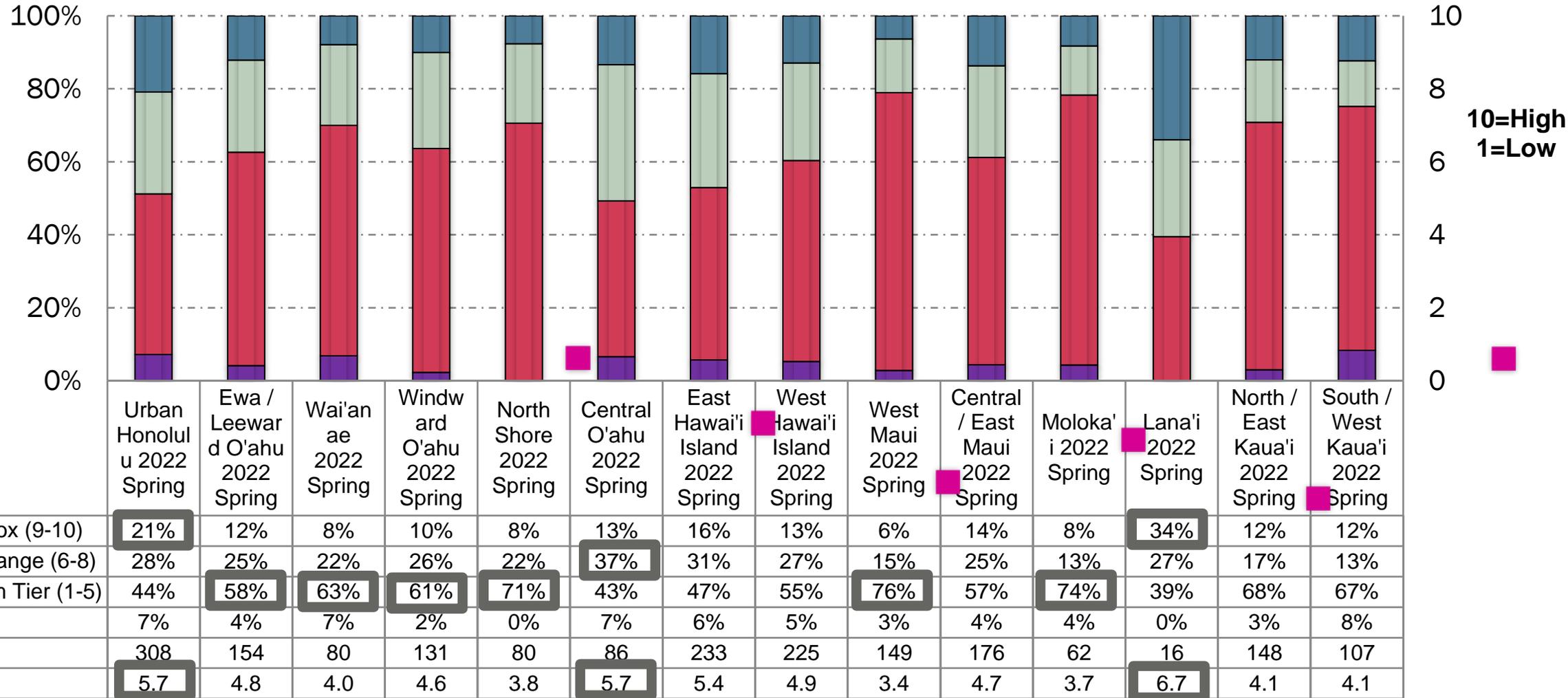
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

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

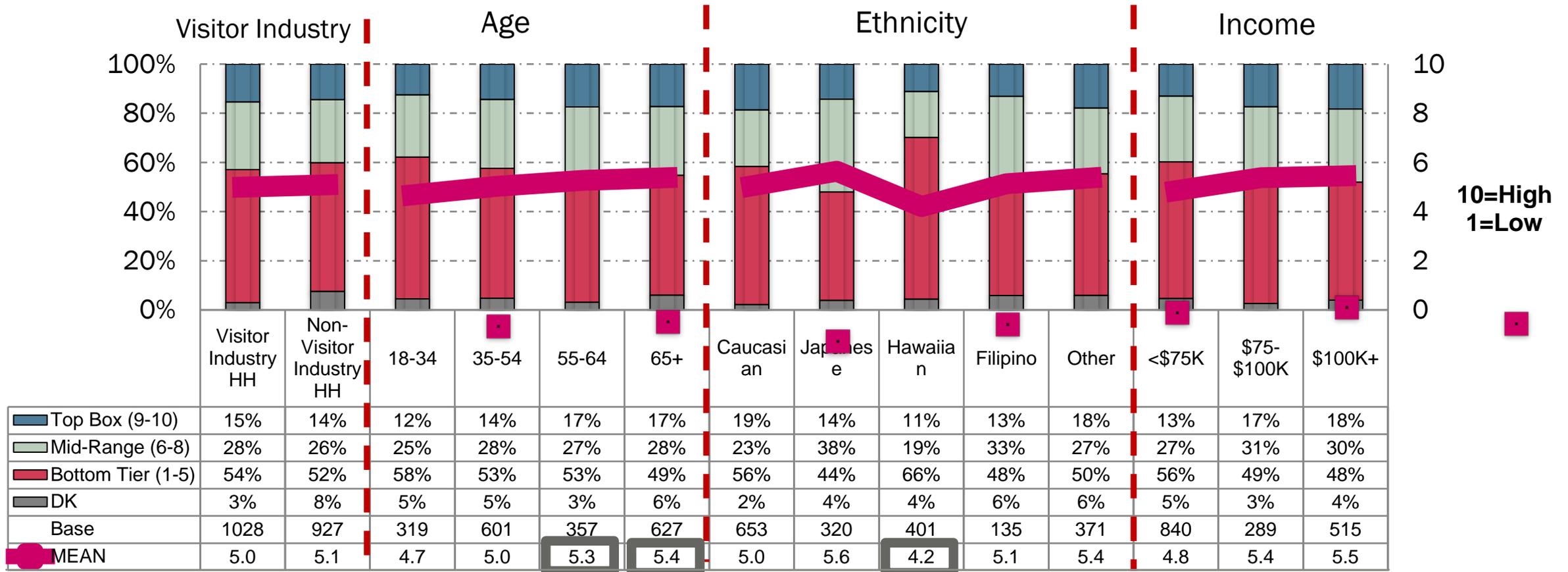


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]

“Tax dollars should be spent to ENCOURAGE tourism in my community.” - *By Area*



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

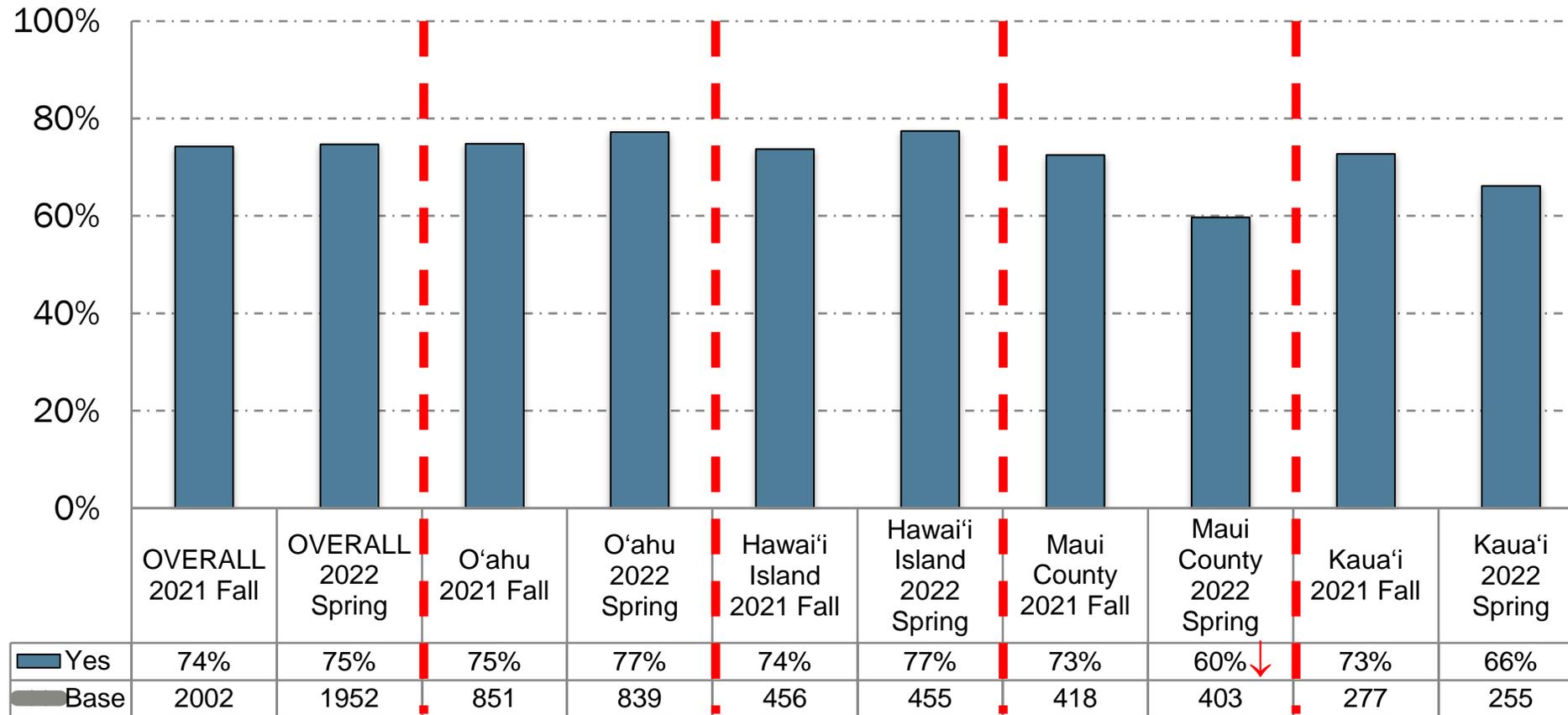


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that...[INSERT]



Tourism Worth the Issues (Fall 2021 and Spring 2022)

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



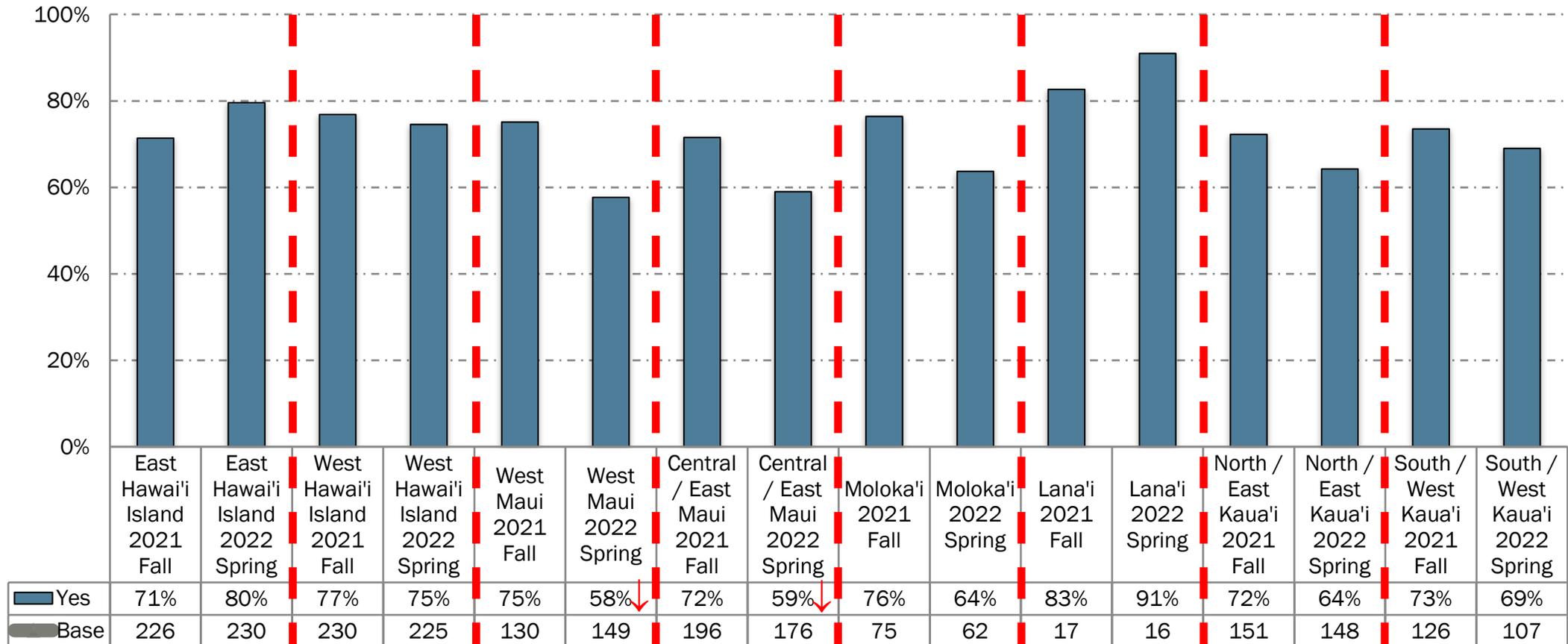
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



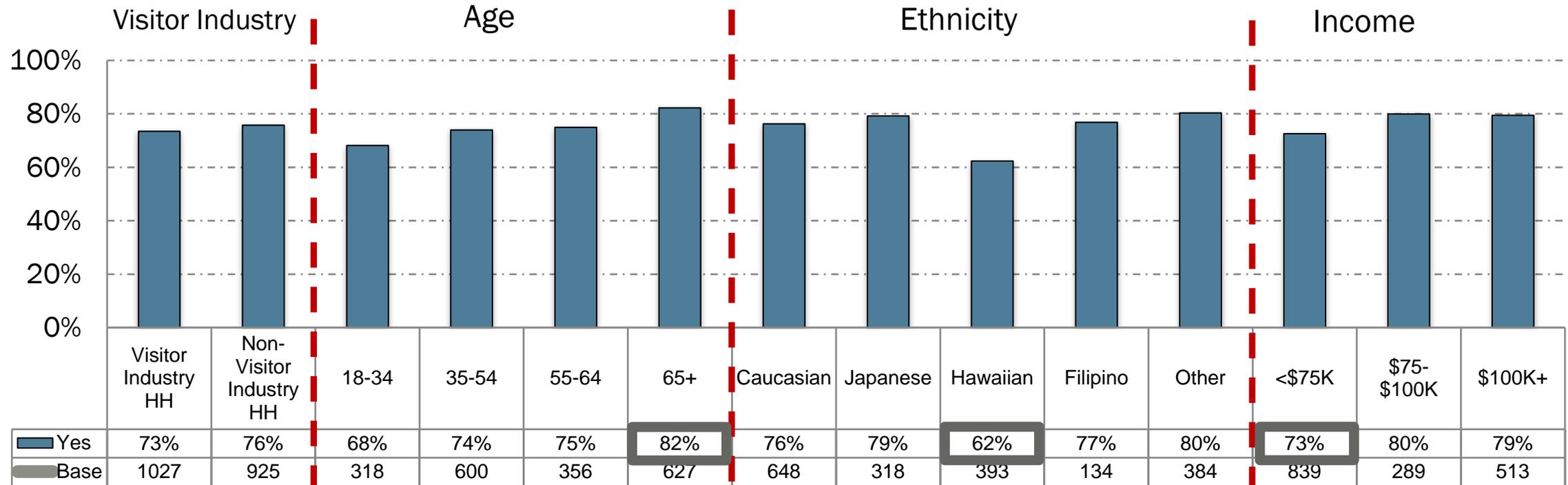
Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



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

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

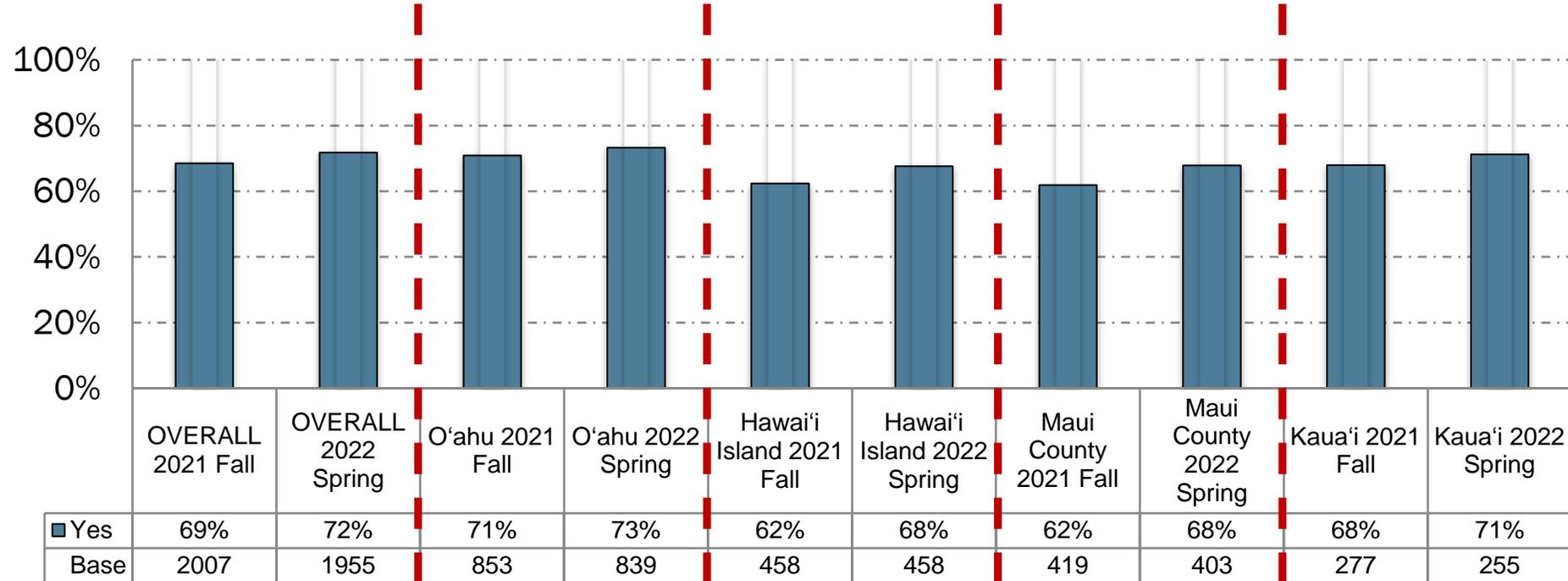


Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?



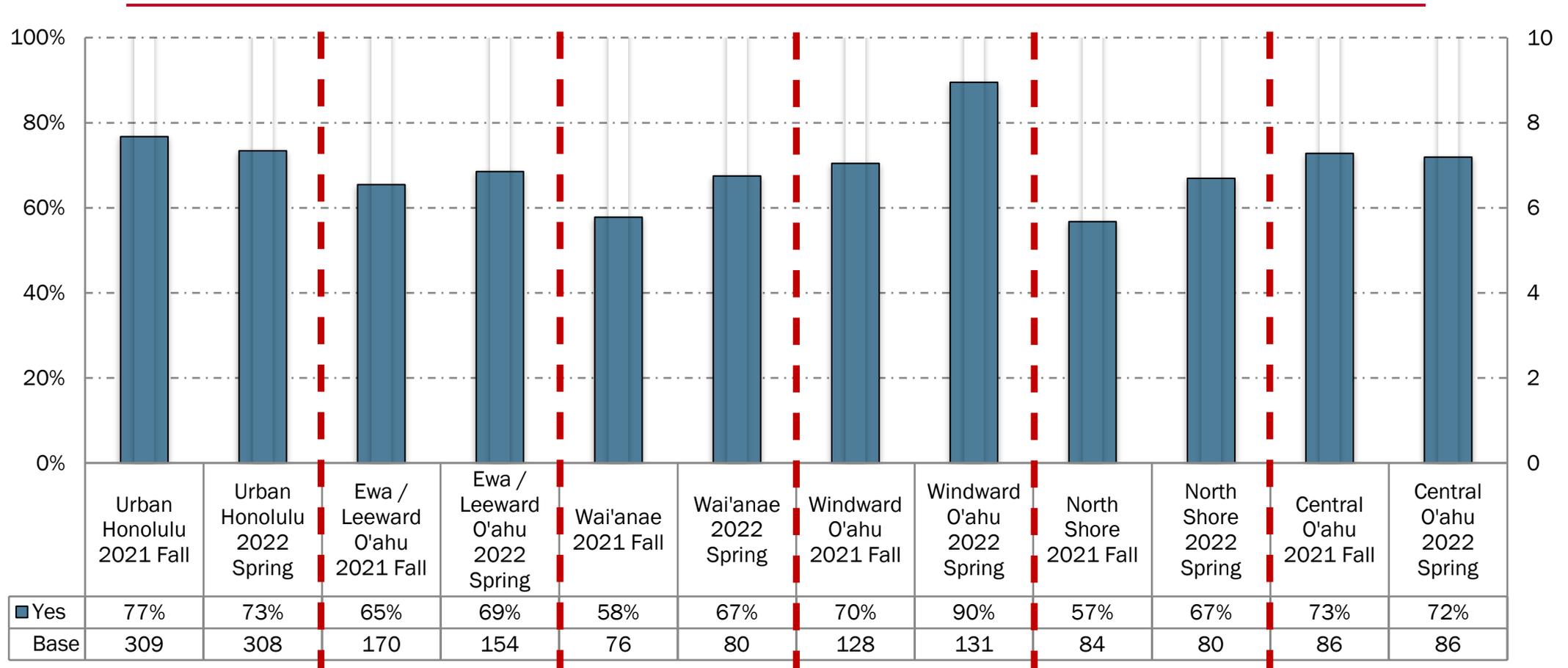
Hawai'i Tourism Authority Perceptions (Fall 2021 and Spring 2022)

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



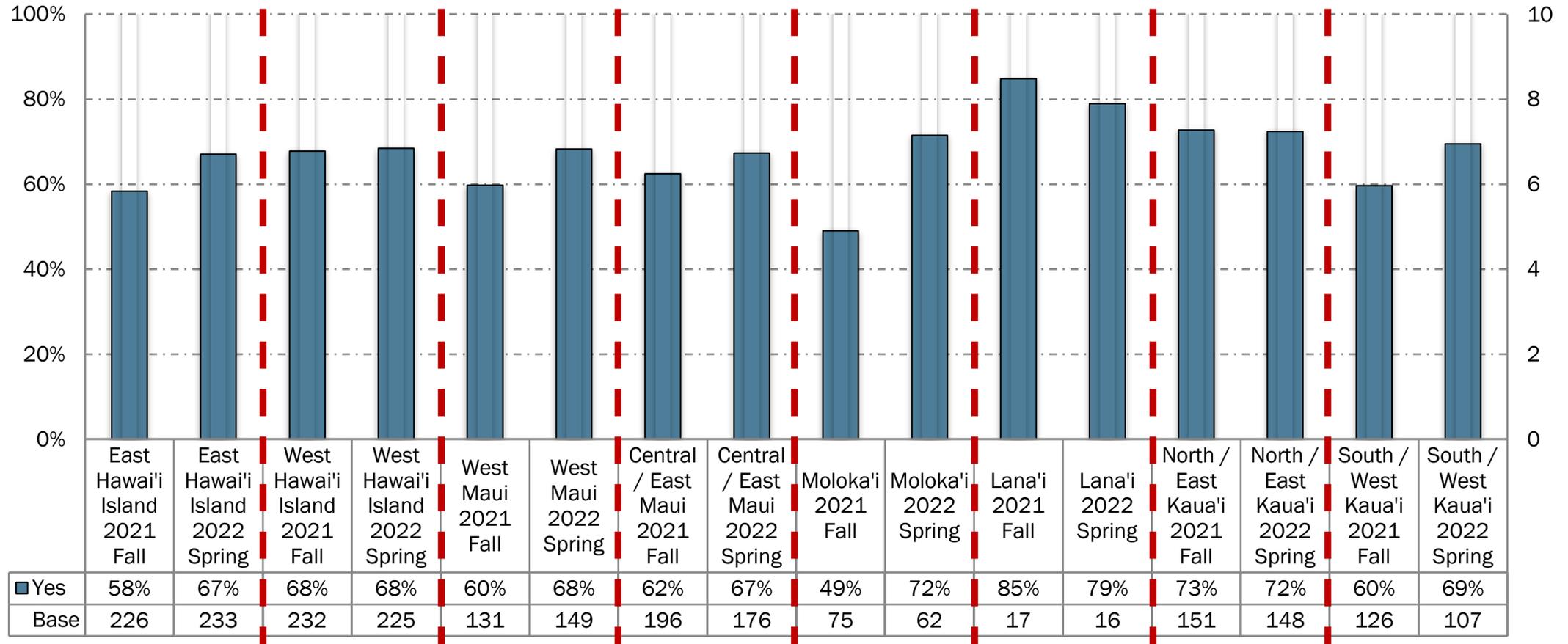
Q11. Prior to doing this survey, were you aware of the existence of the Hawai‘i Tourism Authority [HTA]?

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



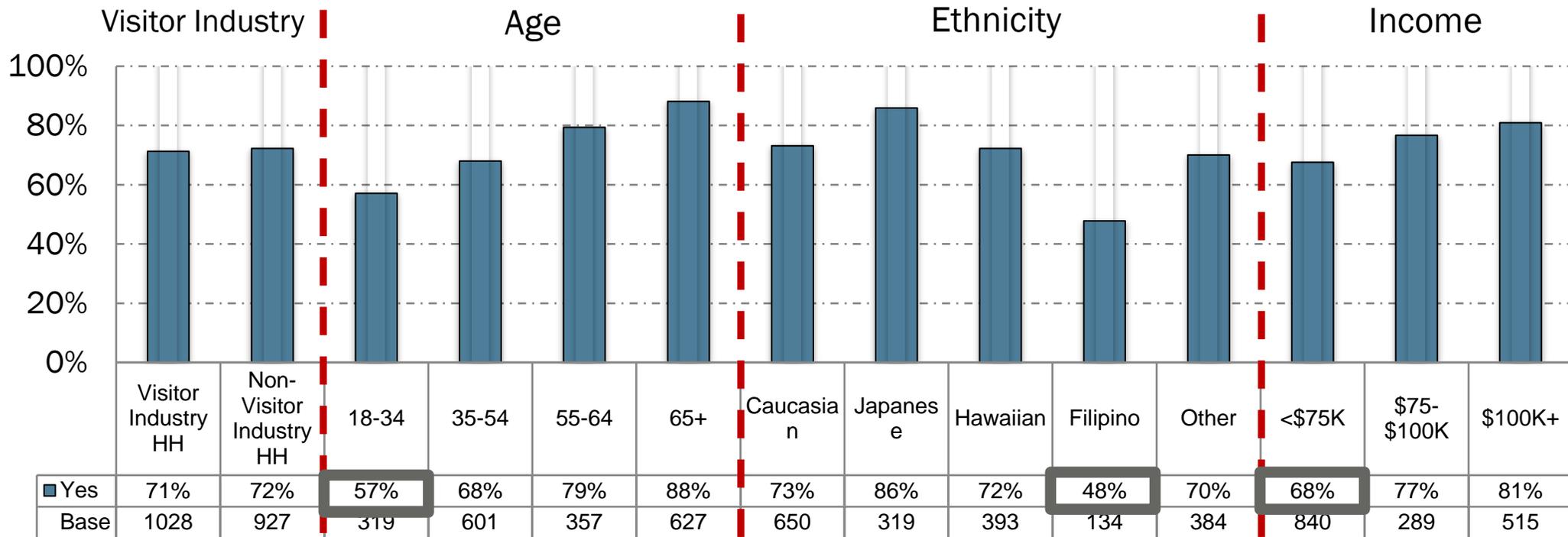
Q11. Prior to doing this survey, were you aware of the existence of the Hawai‘i Tourism Authority [HTA]?

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



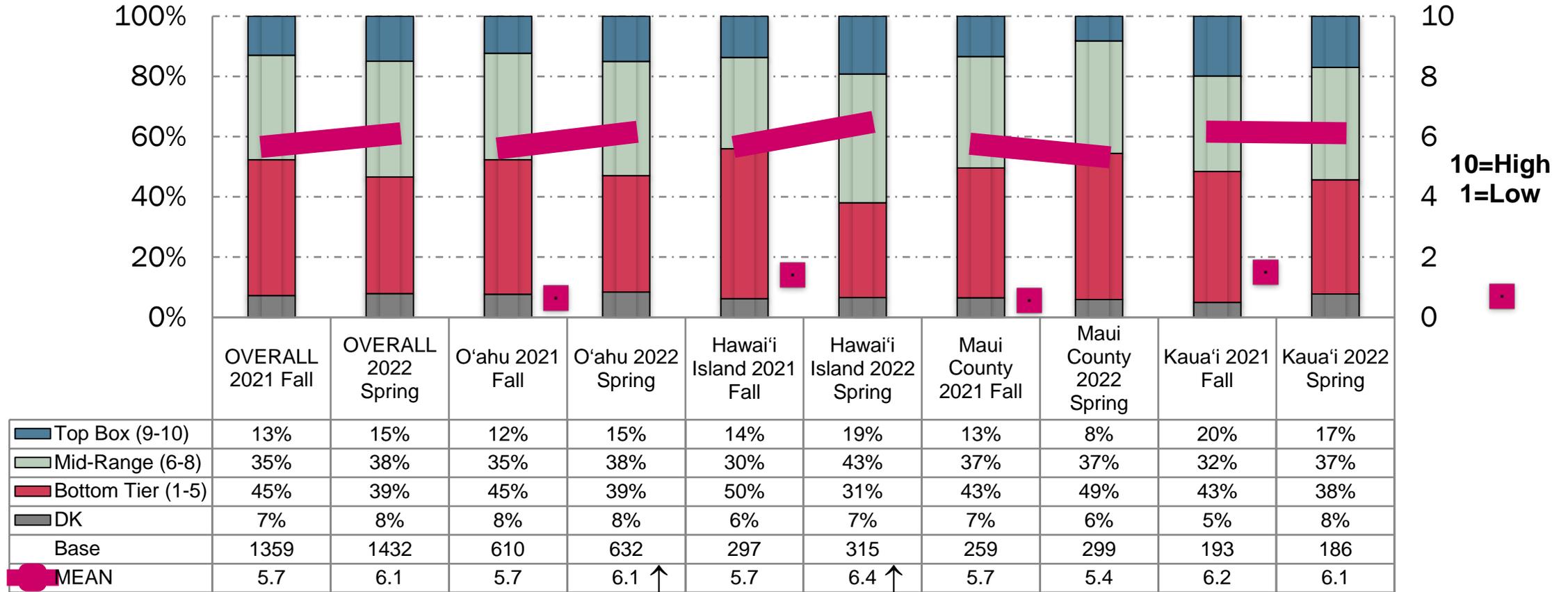
Q11. Prior to doing this survey, were you aware of the existence of the Hawai‘i Tourism Authority [HTA]?

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



Q11. Prior to doing this survey, were you aware of the existence of the Hawai‘i Tourism Authority [HTA]?

HTA Overall Favorability - *By Island*



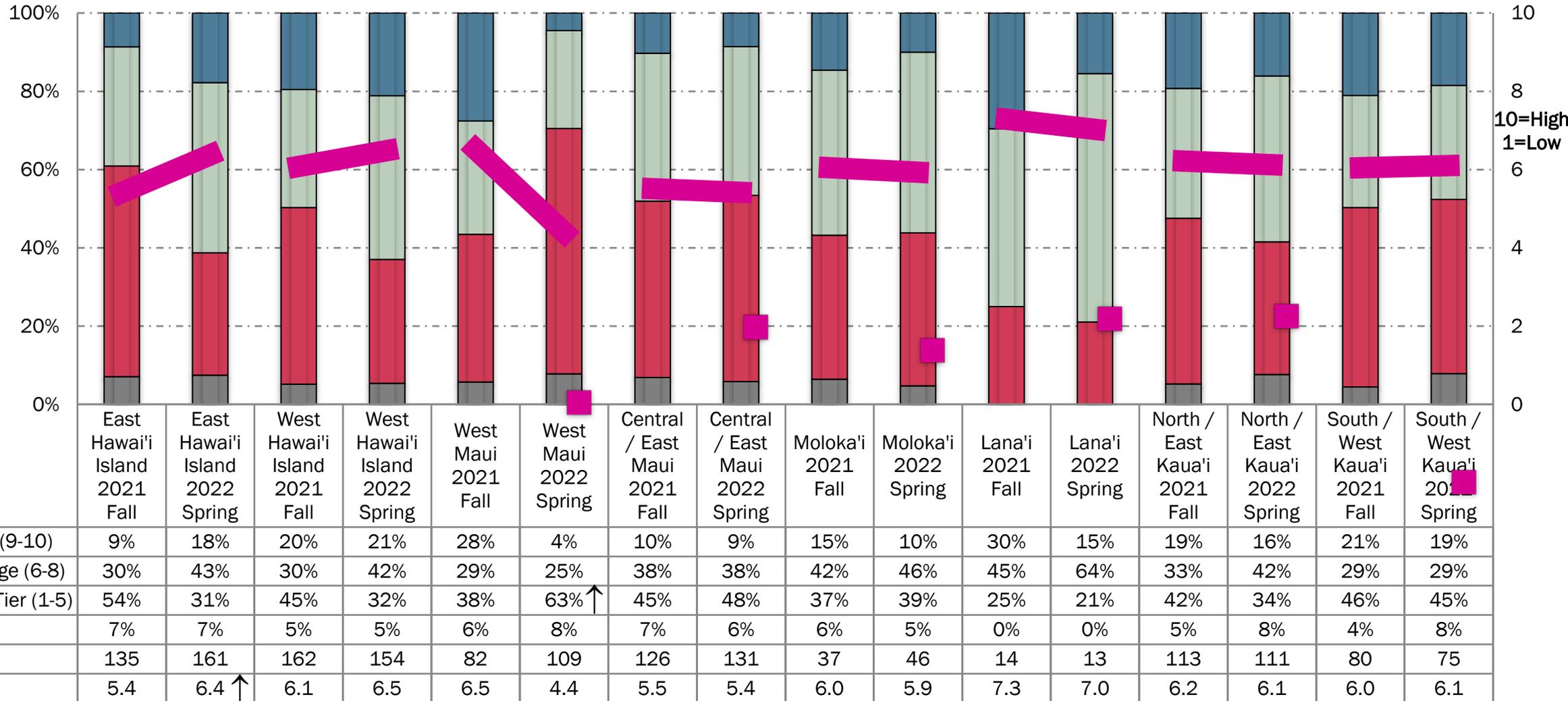
Q12. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



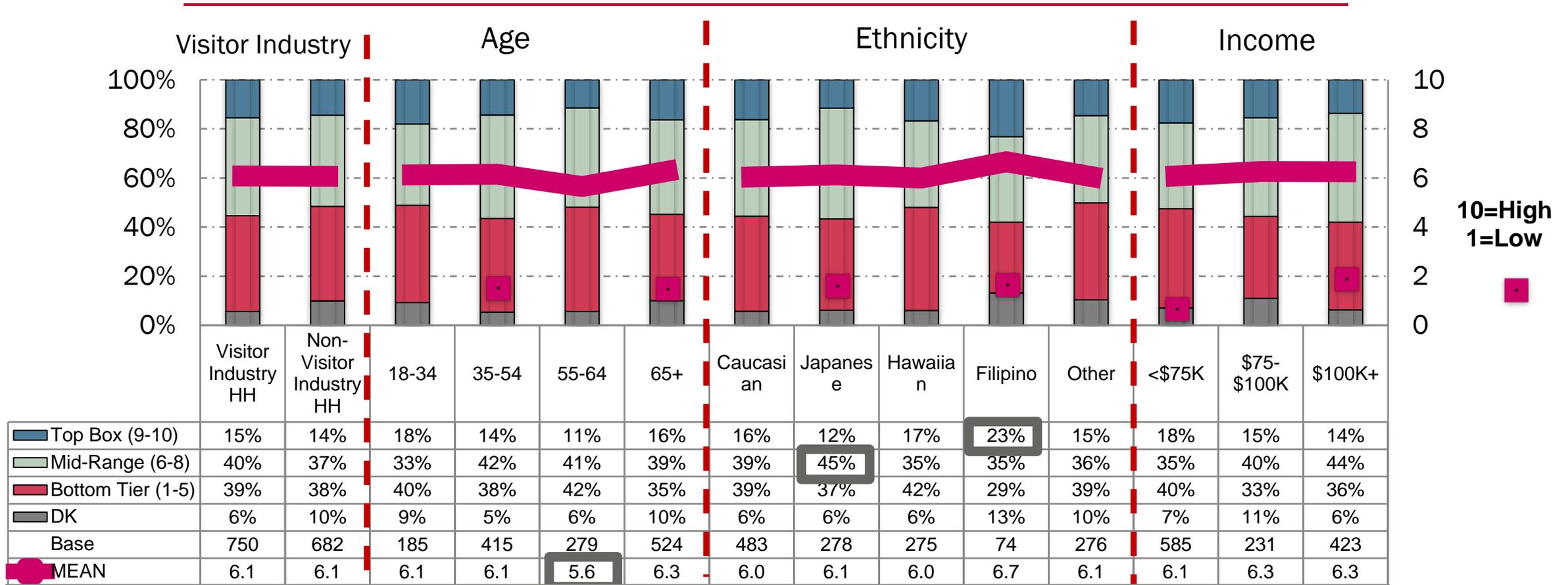
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HTA Overall Favorability - *By Area (Hawai'i Island, Maui, & Kaua'i)*



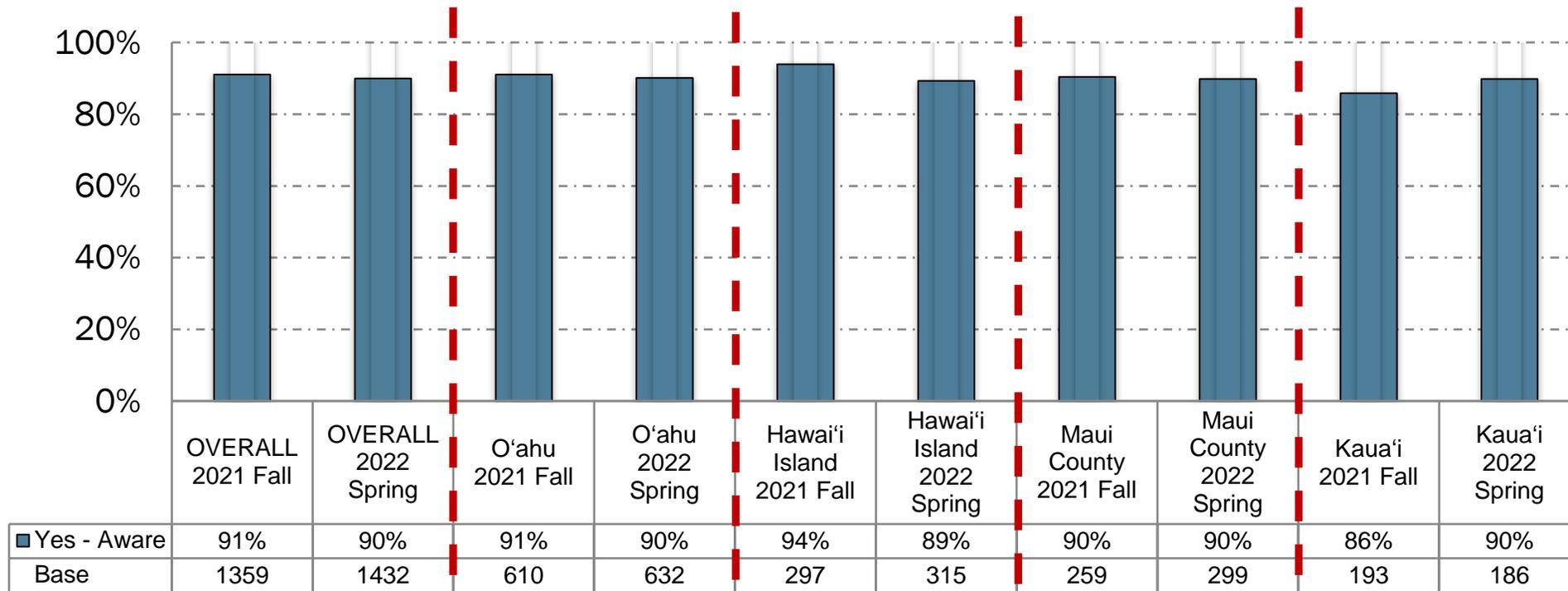
Q12. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

HTA Overall Favorability - *By Demographics*



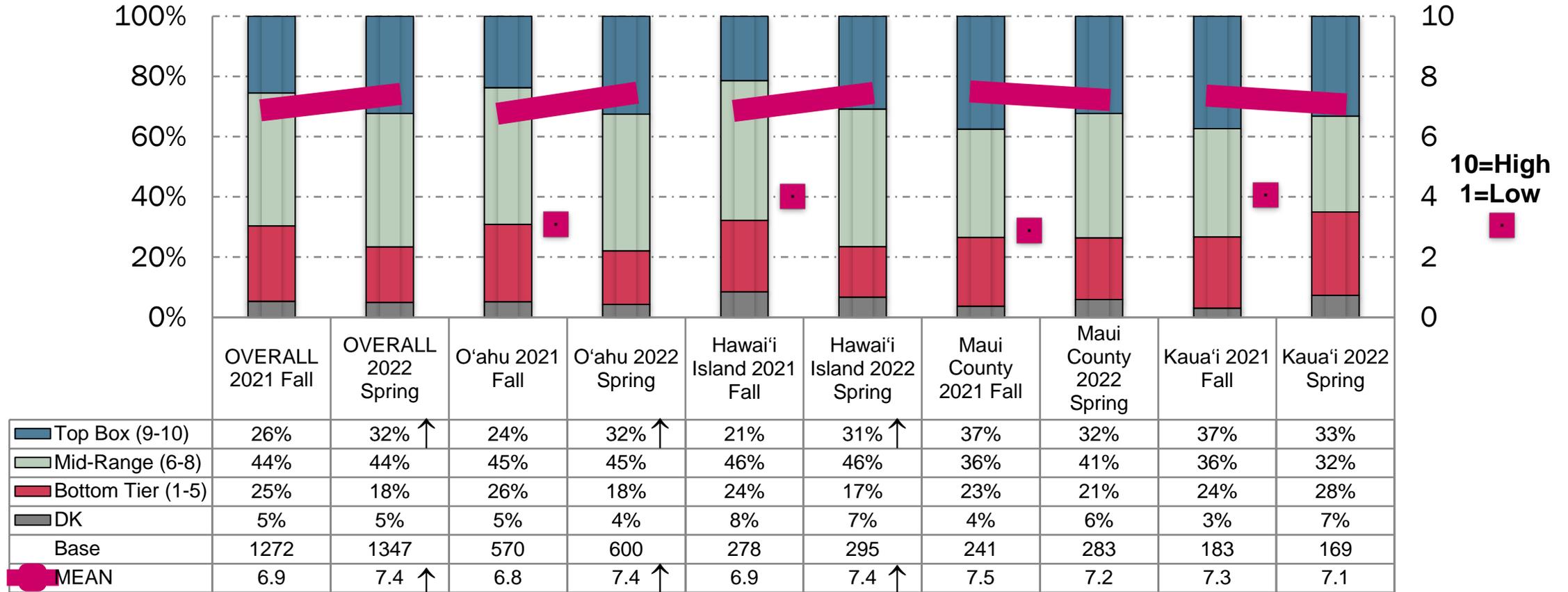
Q12. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

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



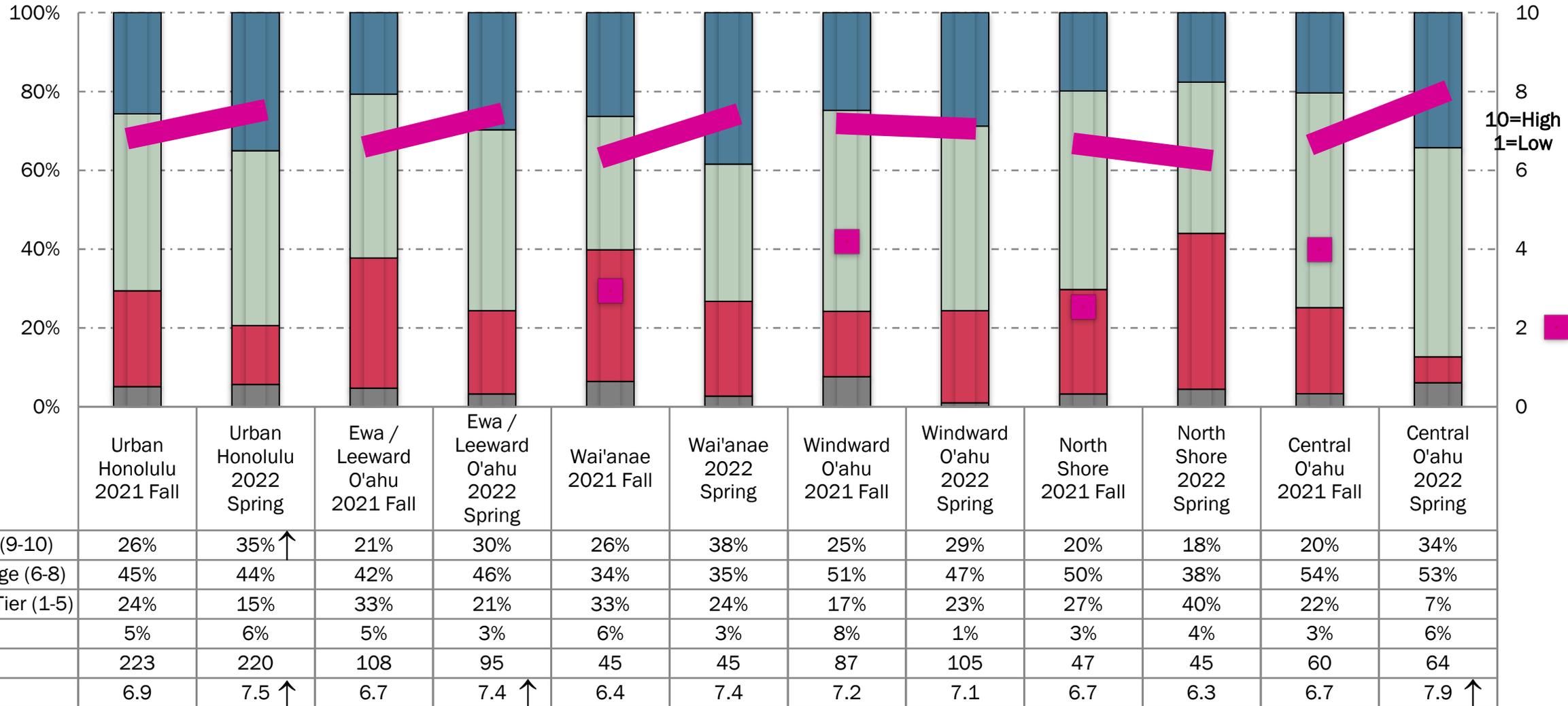
Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ...

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



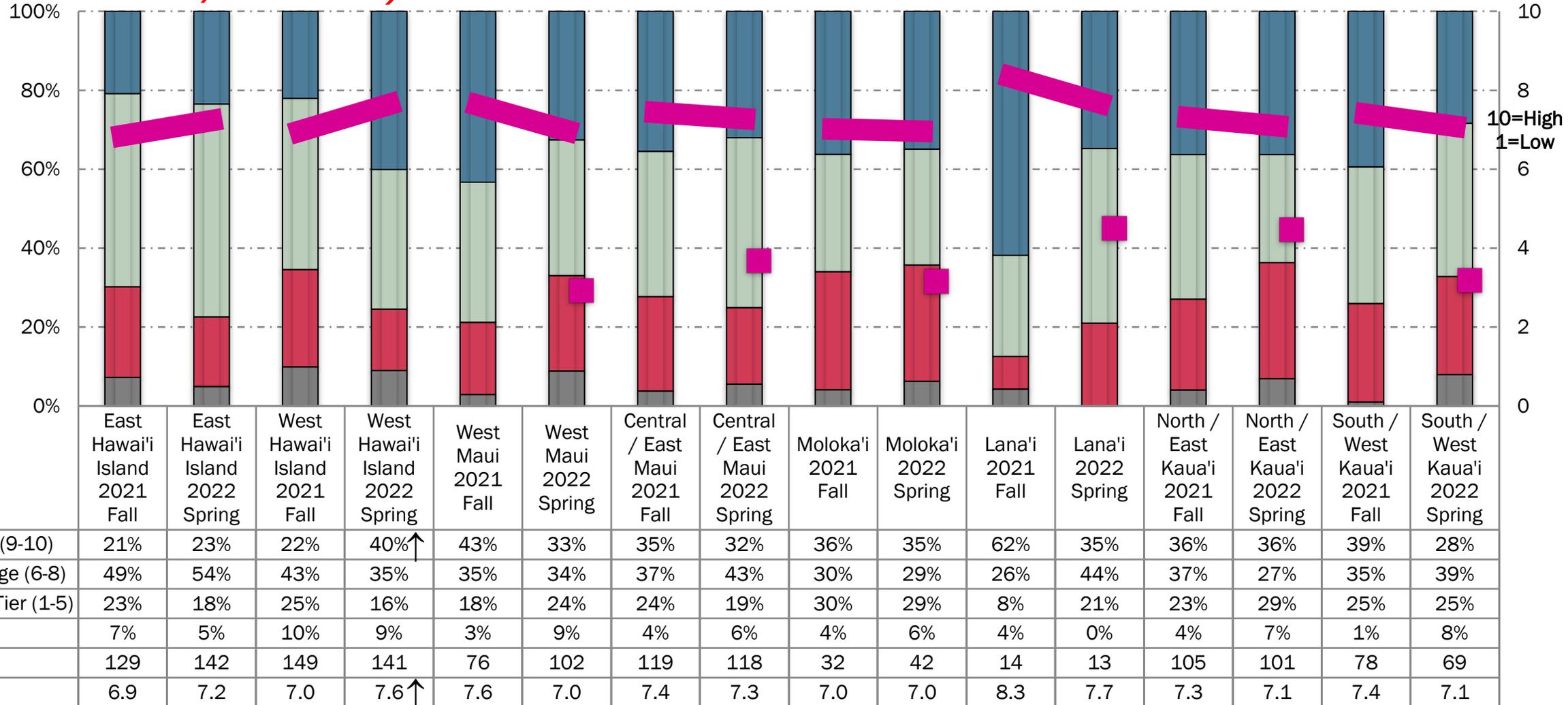
Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the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

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



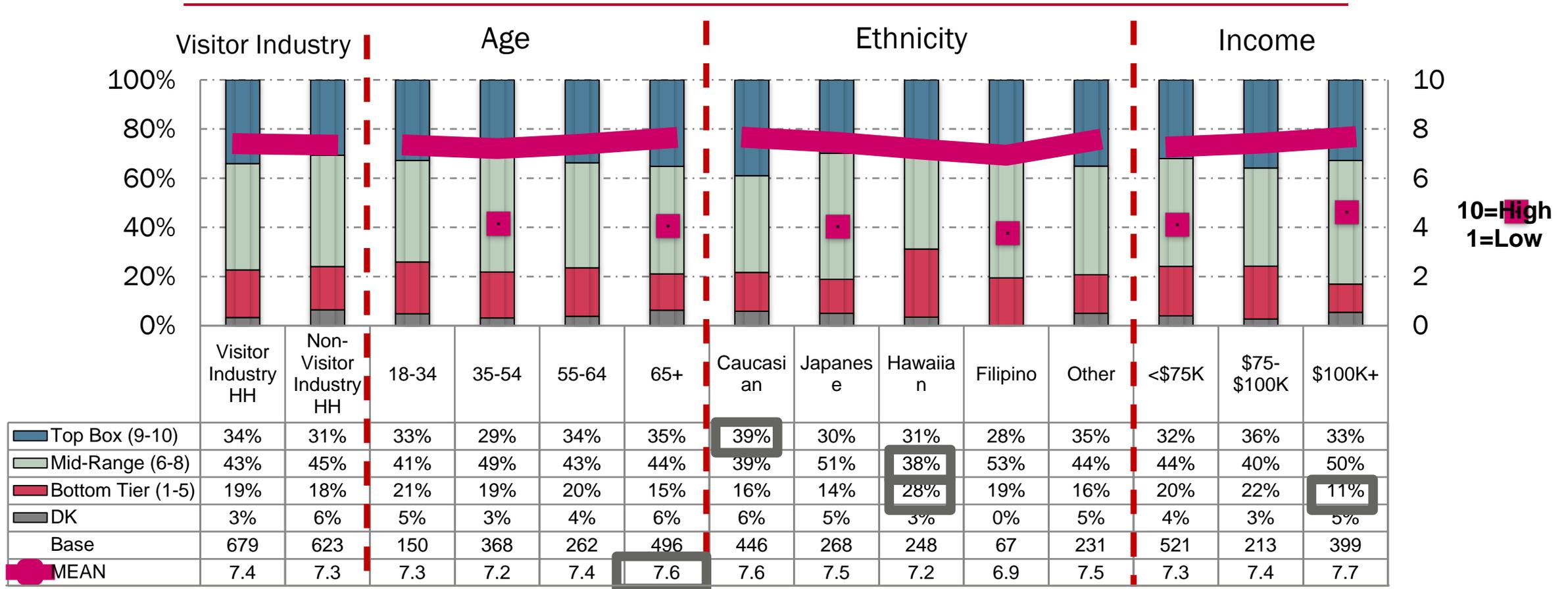
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Marketing and promoting travel to Hawai'i - *By Area (Hawai'i Island, Maui, & Kaua'i)*



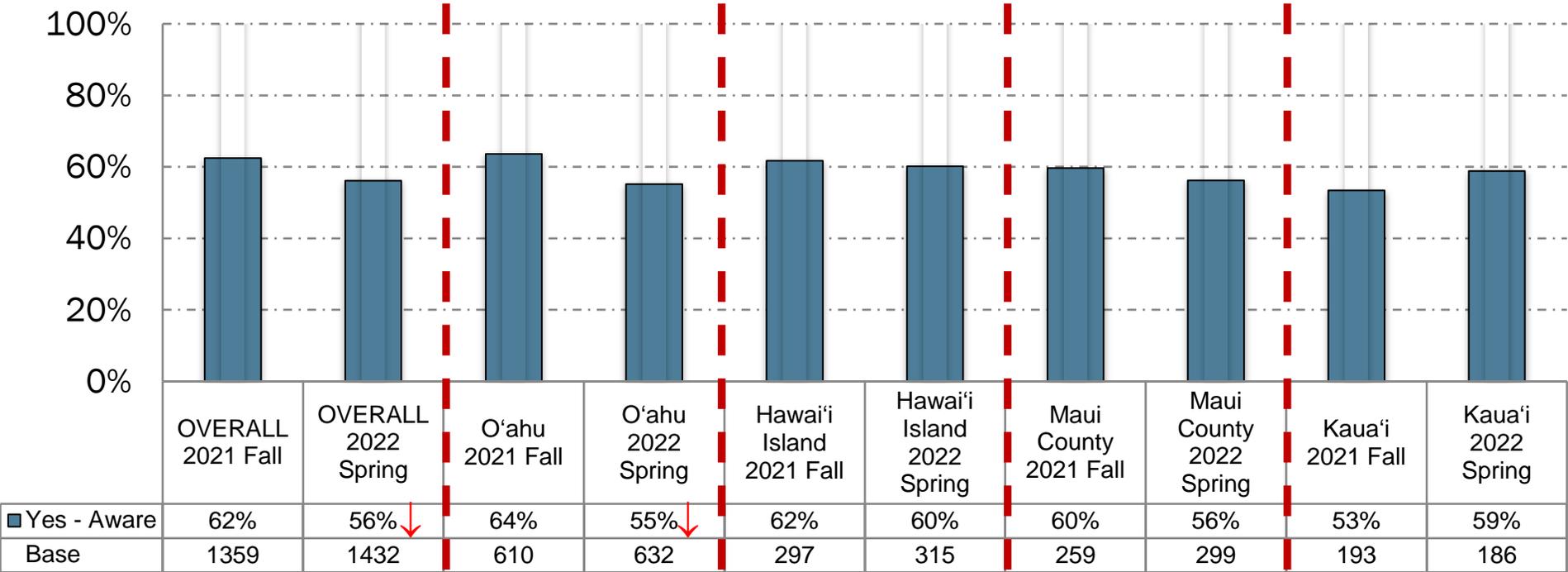
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“Marketing and promoting travel to Hawai‘i” – *By Demographics*



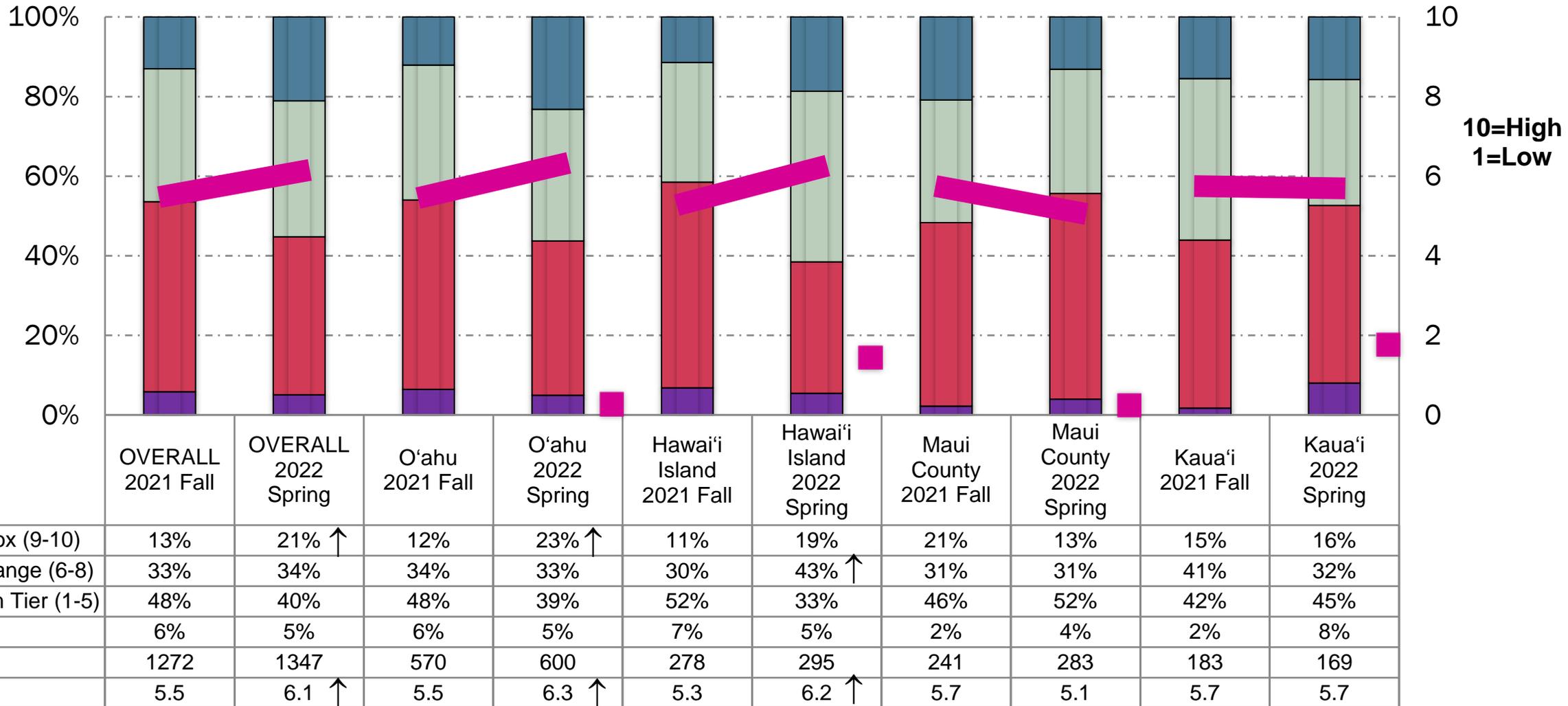
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HTA: Aware Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life - *By Island*



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

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



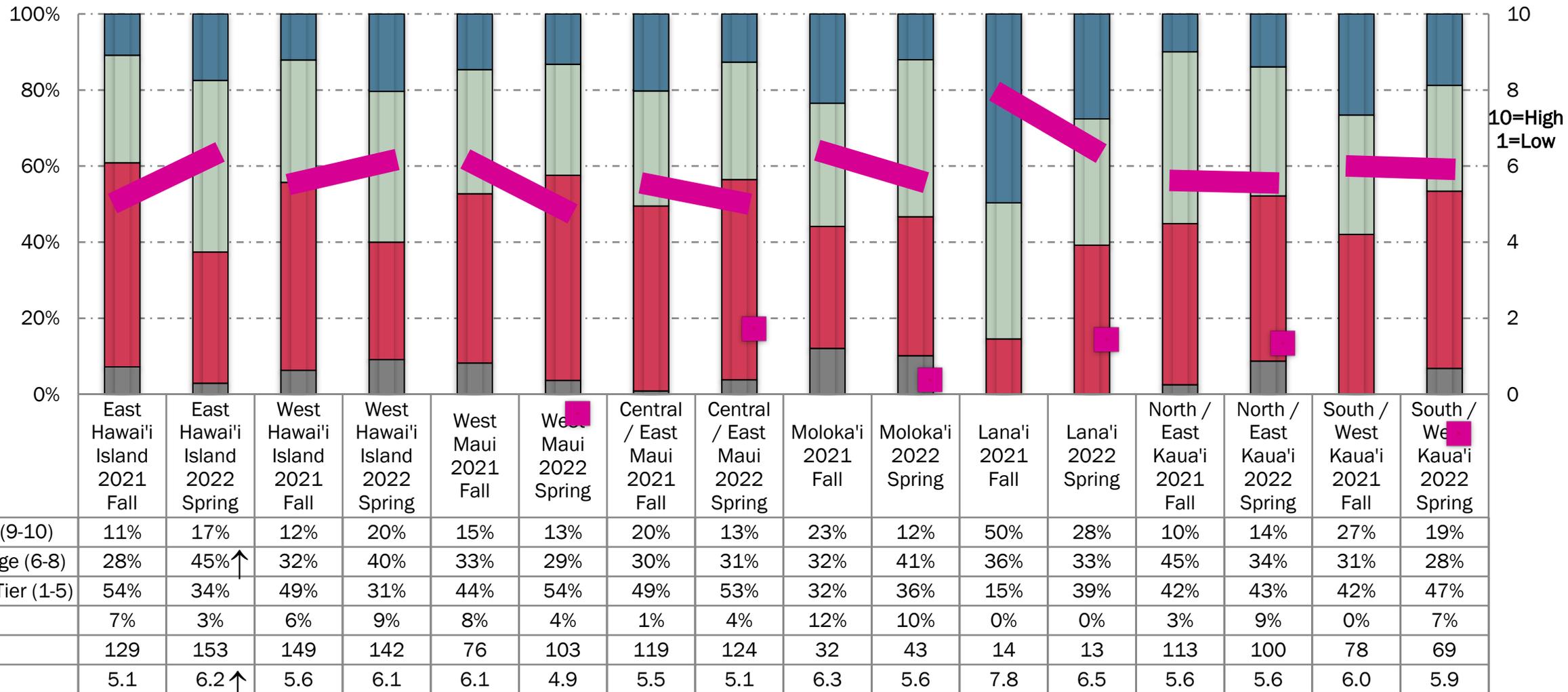
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“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” - *By Area (O'ahu)*



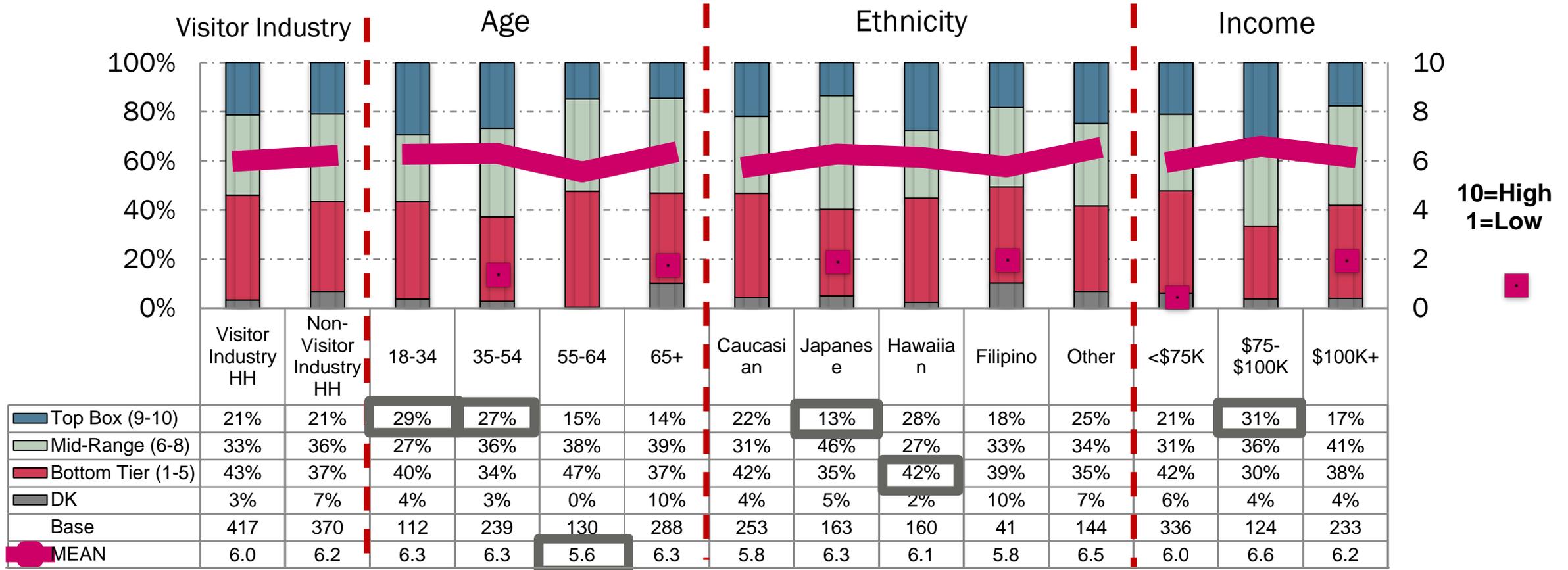
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“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



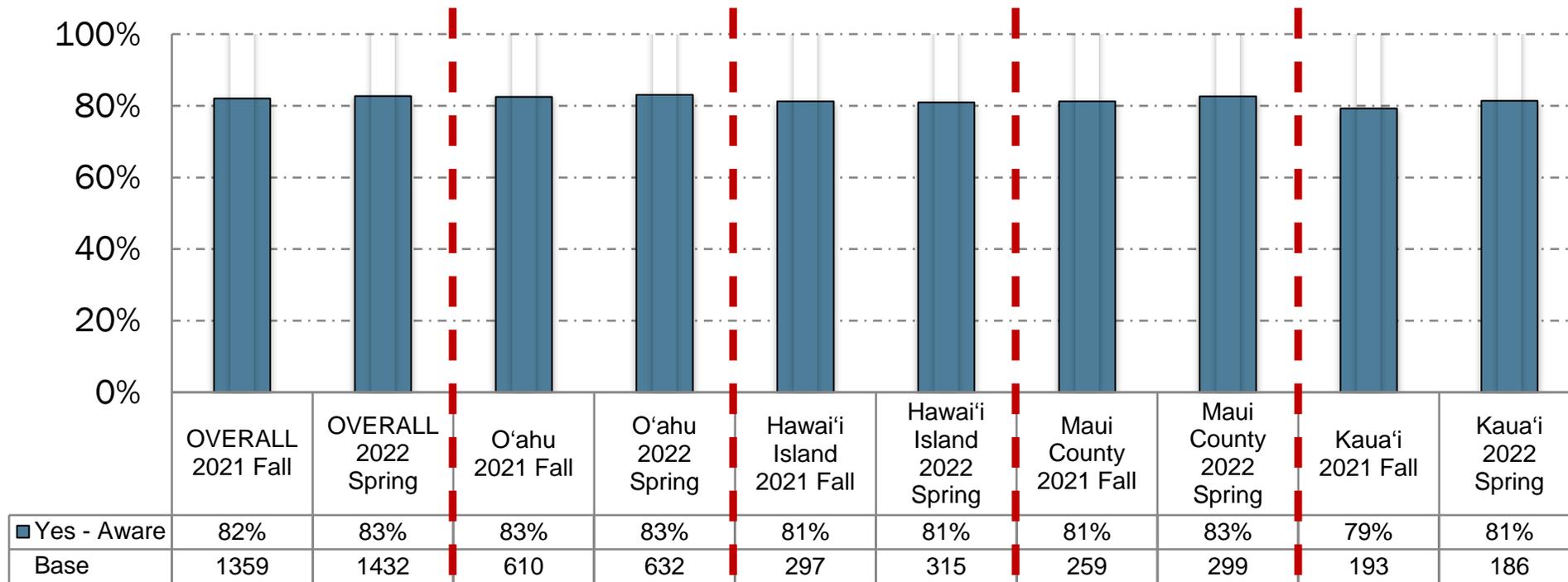
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“Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.” – *By Demographics*



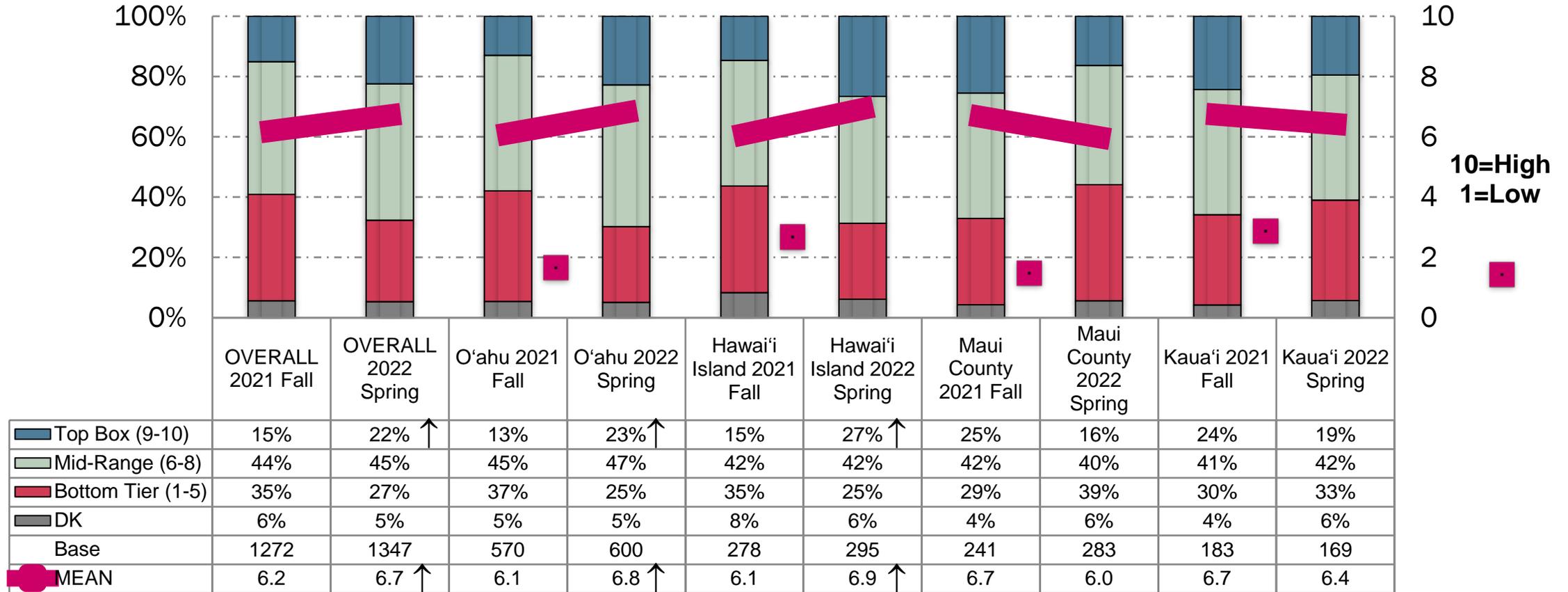
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HTA: Aware of Leading the visitor industry in Hawai'i - *By Island*



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

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



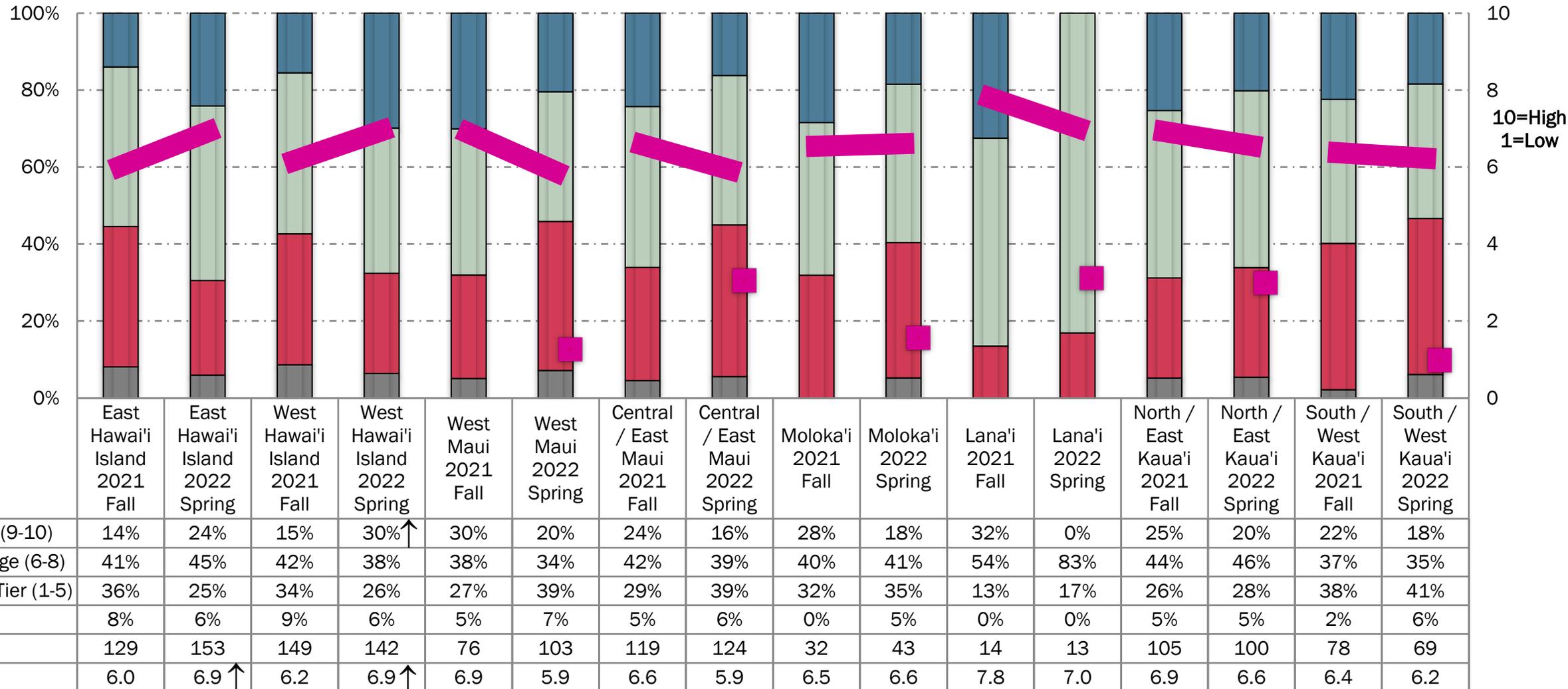
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“Leading the visitor industry in Hawai‘i” - *By Area (O‘ahu)*



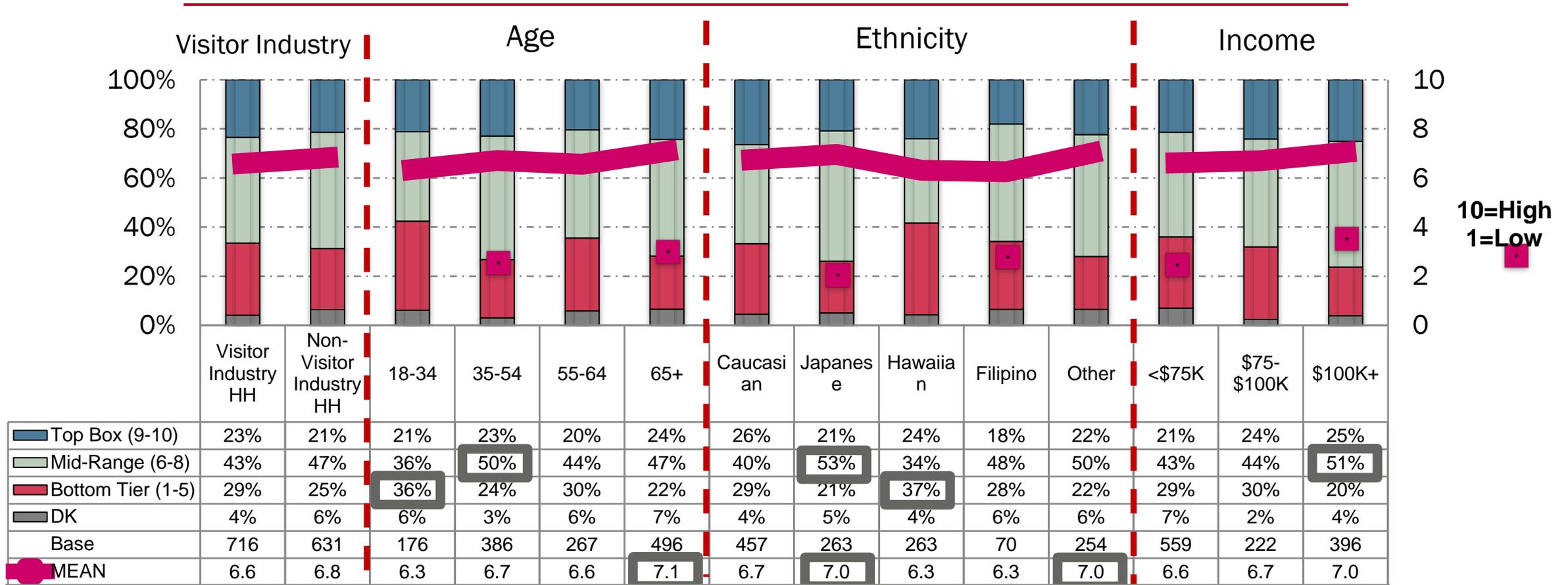
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“Leading the visitor industry in Hawai‘i” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



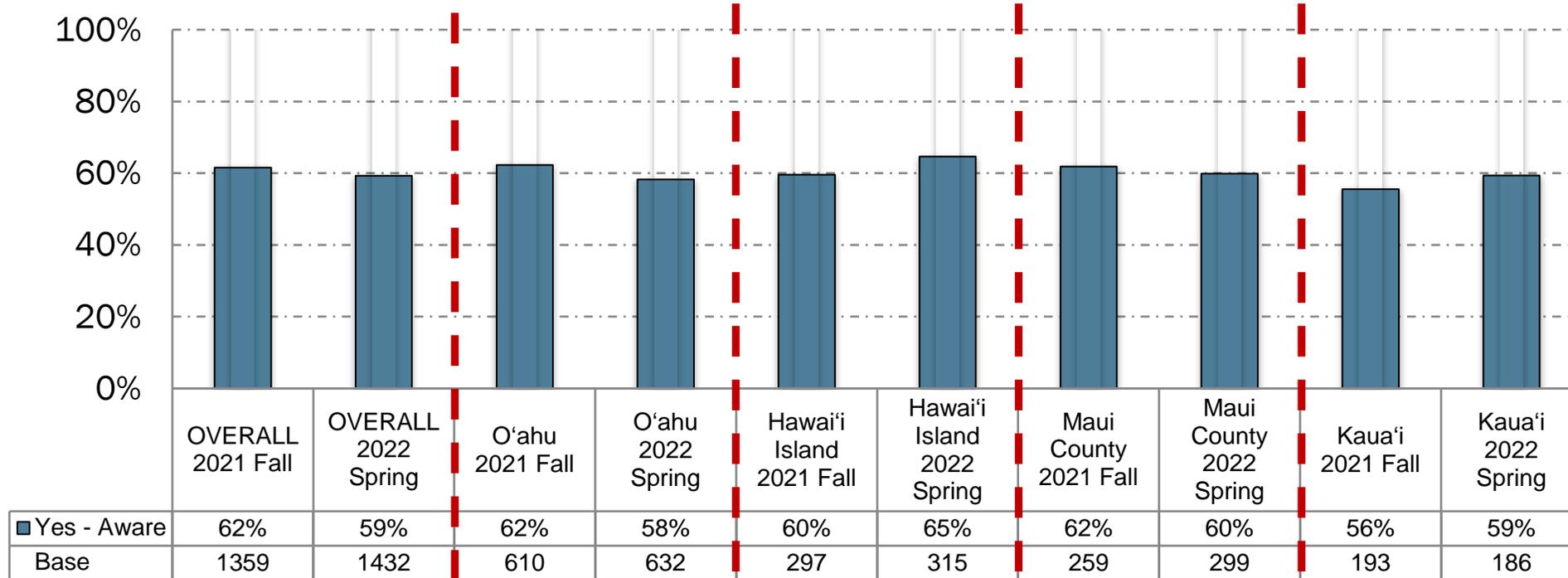
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“Leading the visitor industry in Hawai‘i” – *By Demographics*



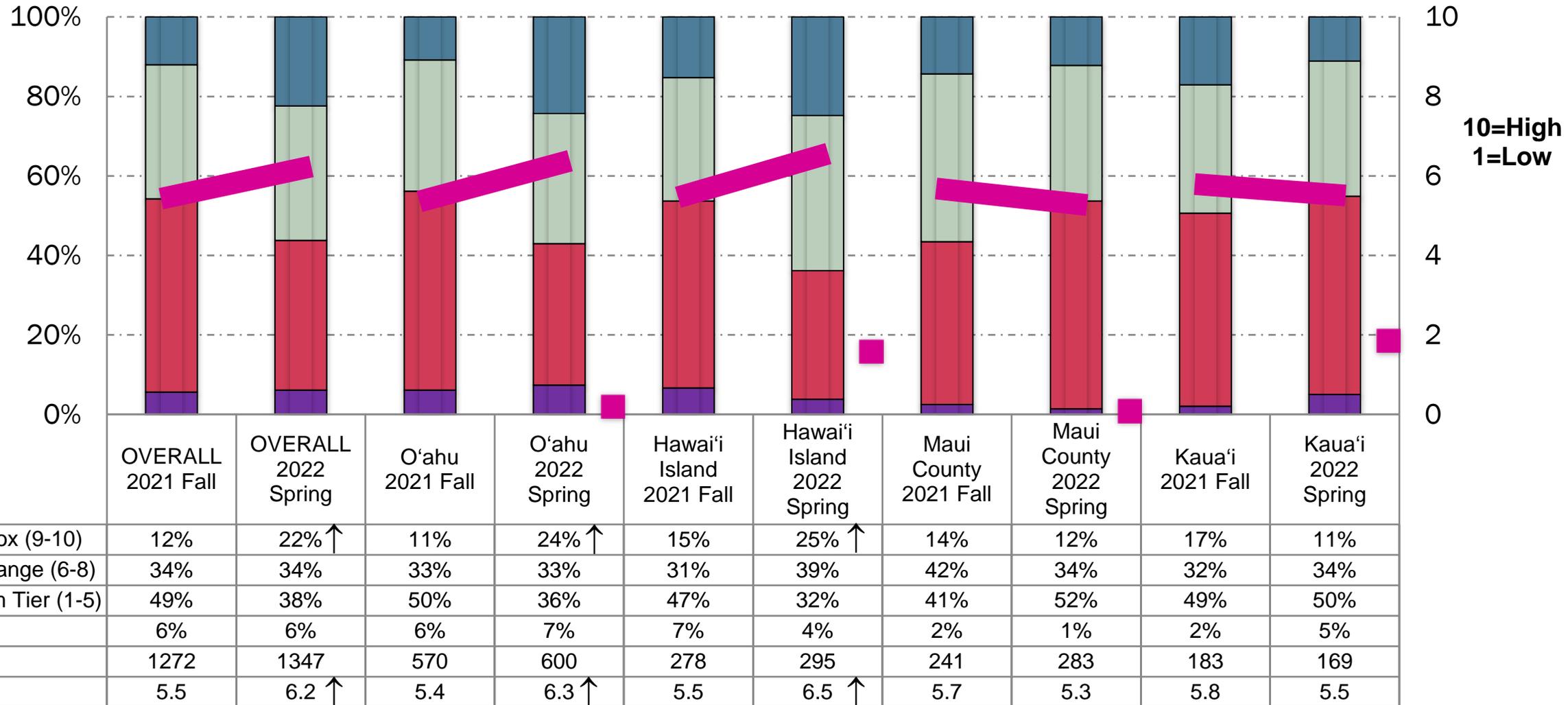
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HTA: Aware of Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions - *By Island*



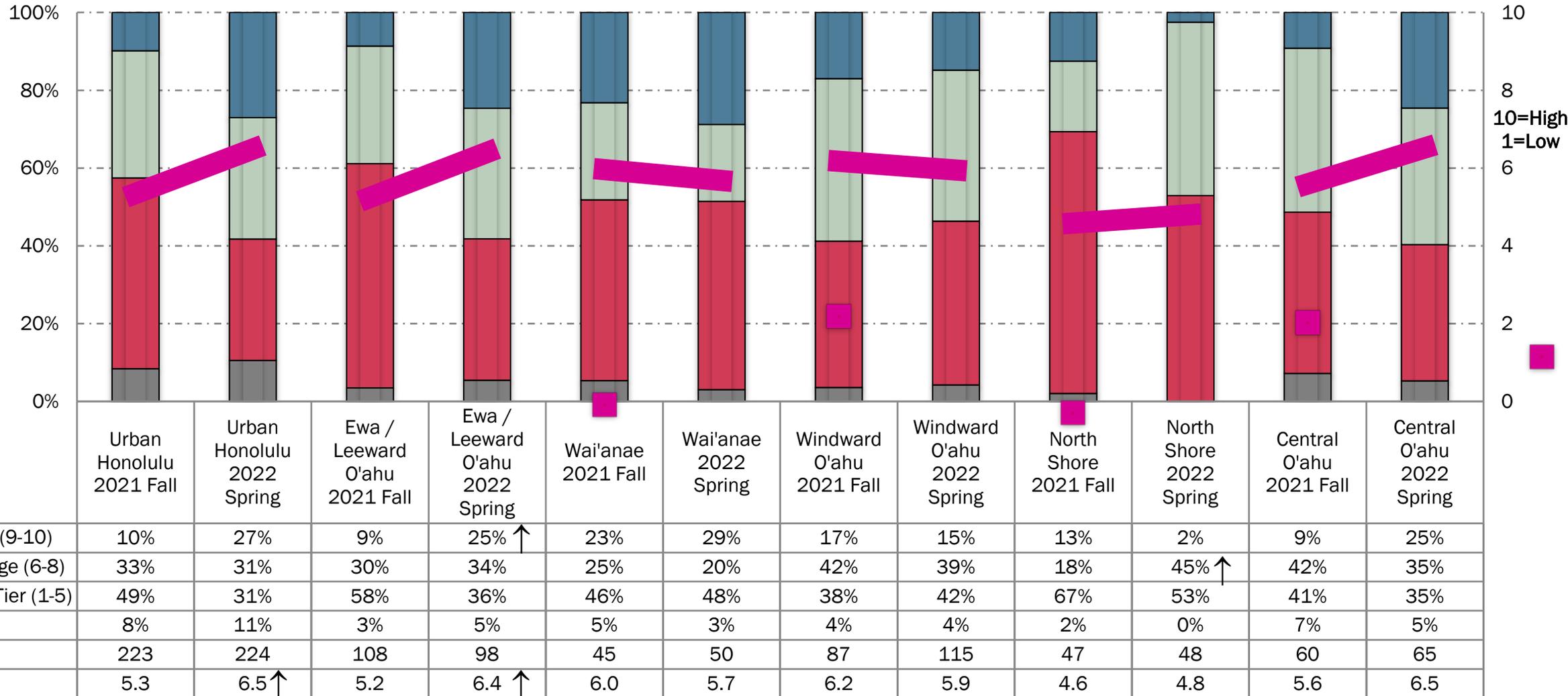
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” – *By Island*



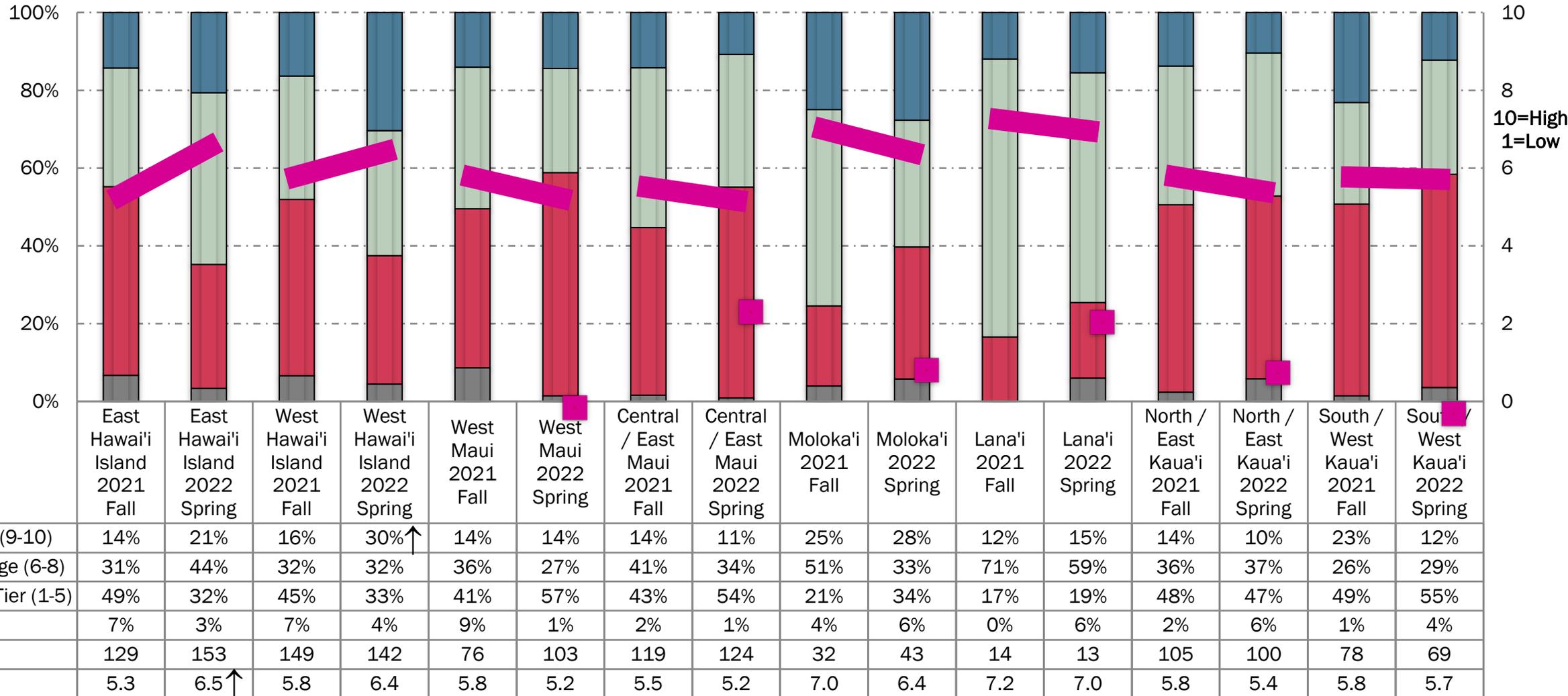
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” - *By Area (O‘ahu)*



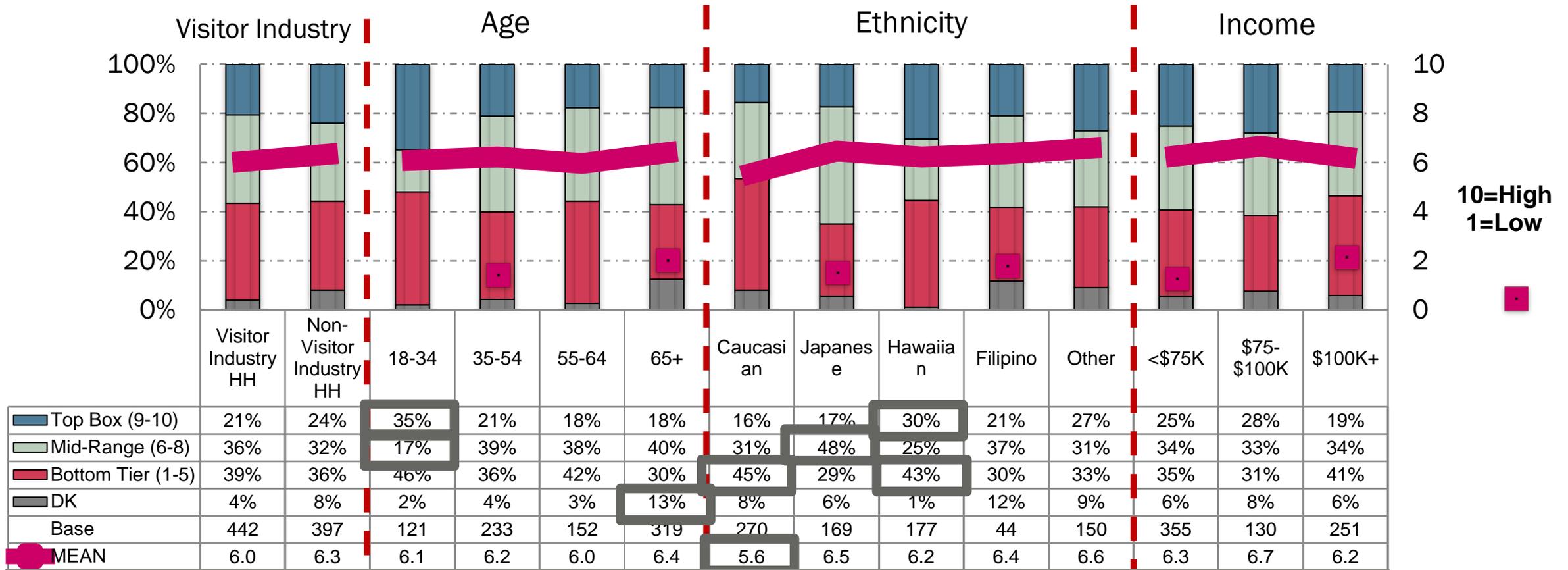
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



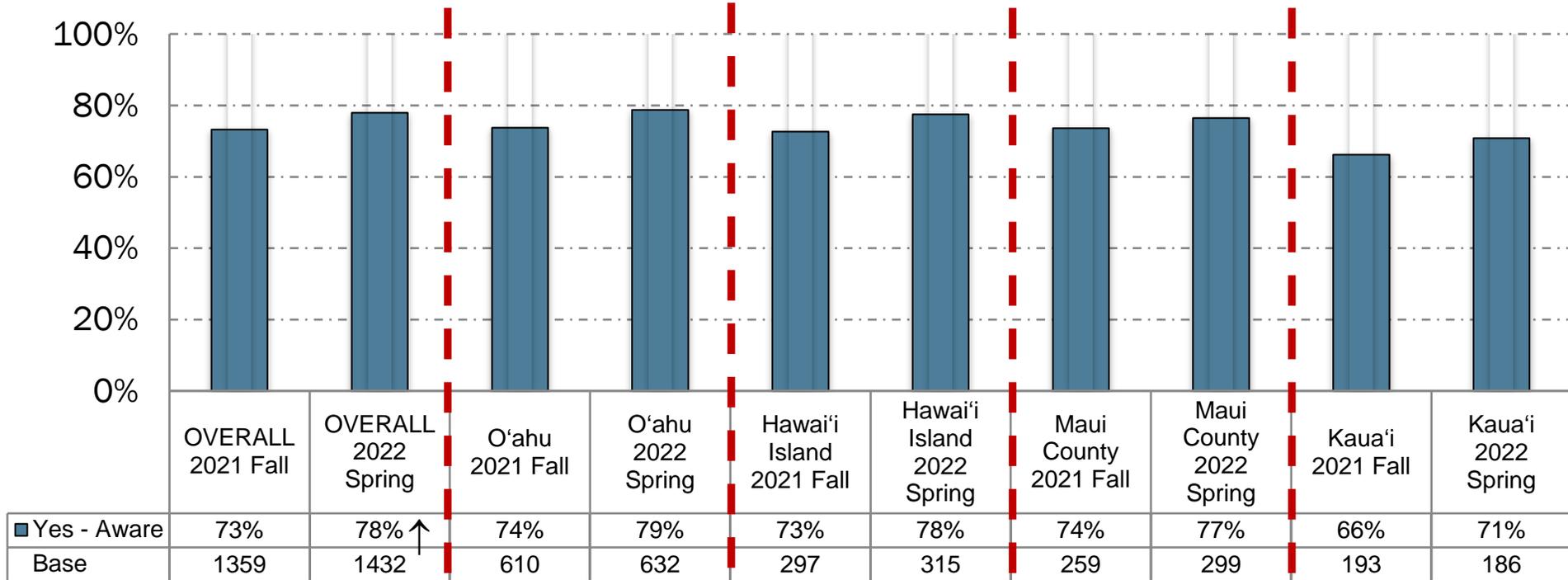
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“Proactively educating the visitor industry, visitors and residents to mālama the islands and its traditions” – *By Demographics*



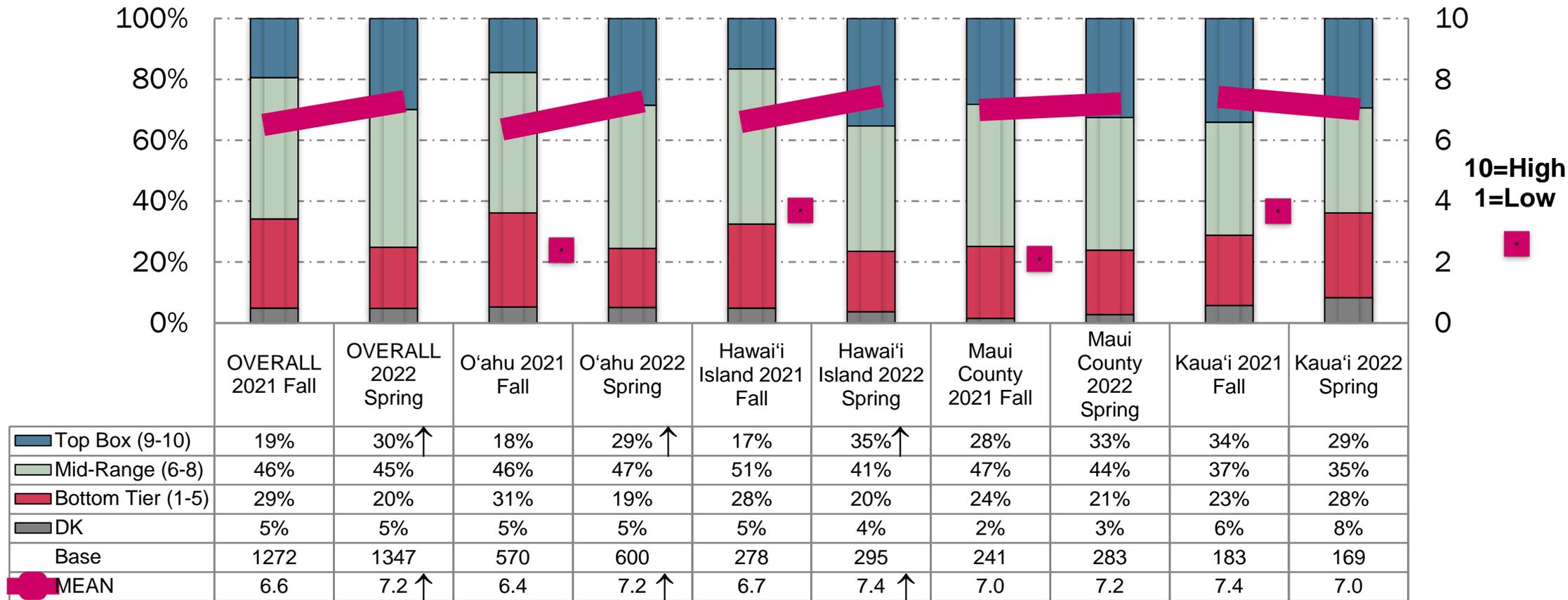
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HTA: Aware of Upholding Hawai'i's place as a premier global travel destination - *By Island*



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

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



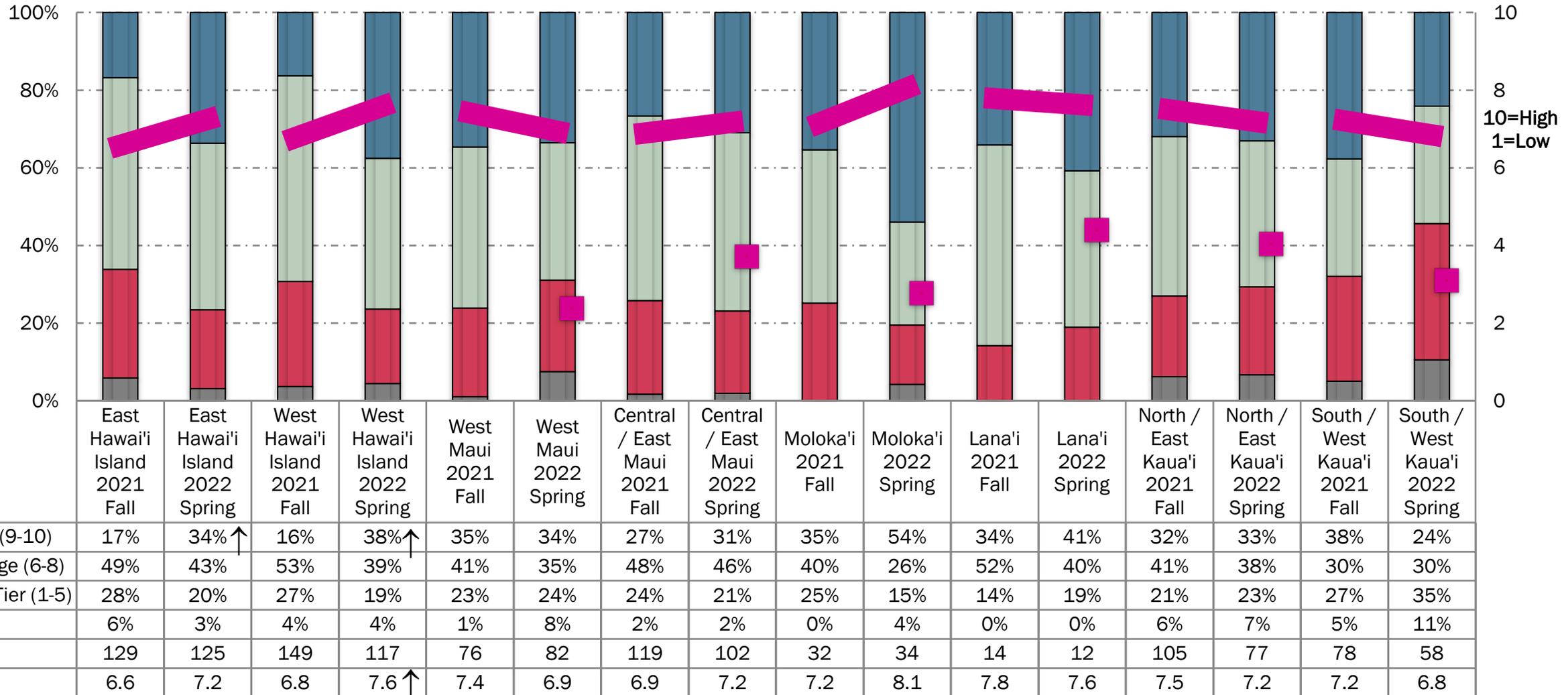
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“Upholding Hawai‘i's place as a premier global travel destination” - By Area (O‘ahu)



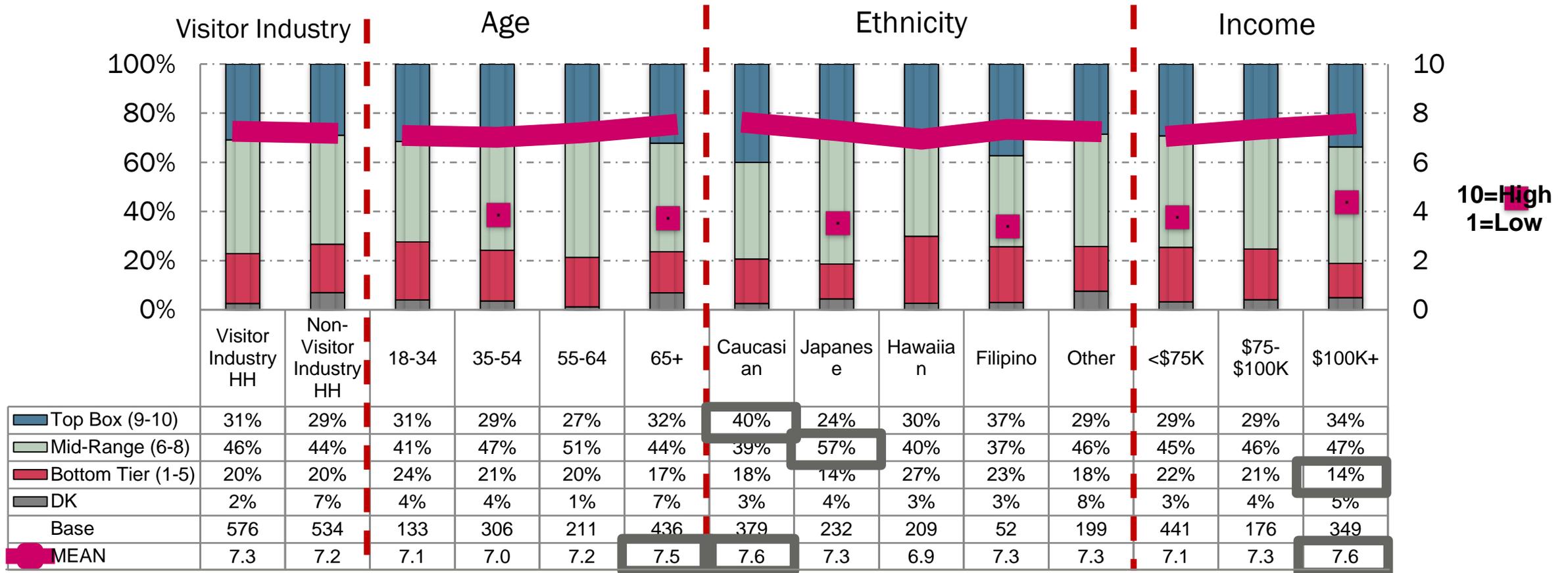
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“Upholding Hawai‘i's place as a premier global travel destination” - By Area (Hawai‘i Island, Maui, & Kaua‘i)



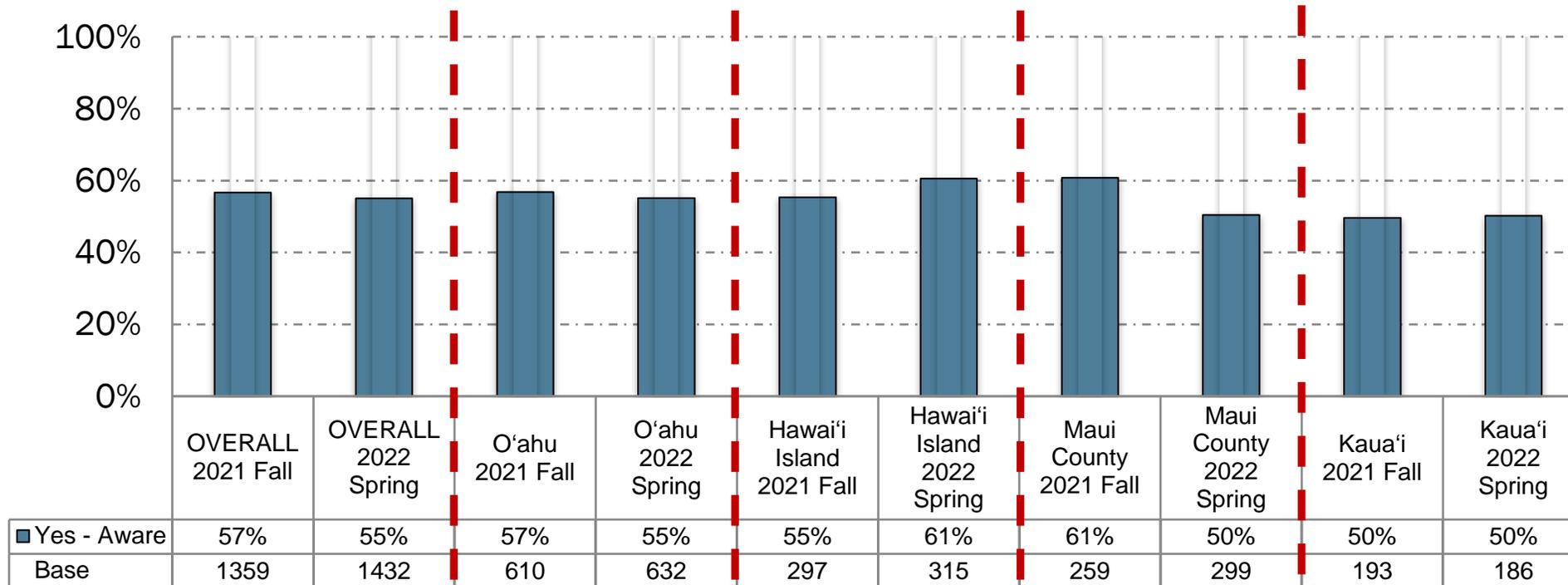
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“Upholding Hawai‘i's place as a premier global travel destination” – *By Demographics*



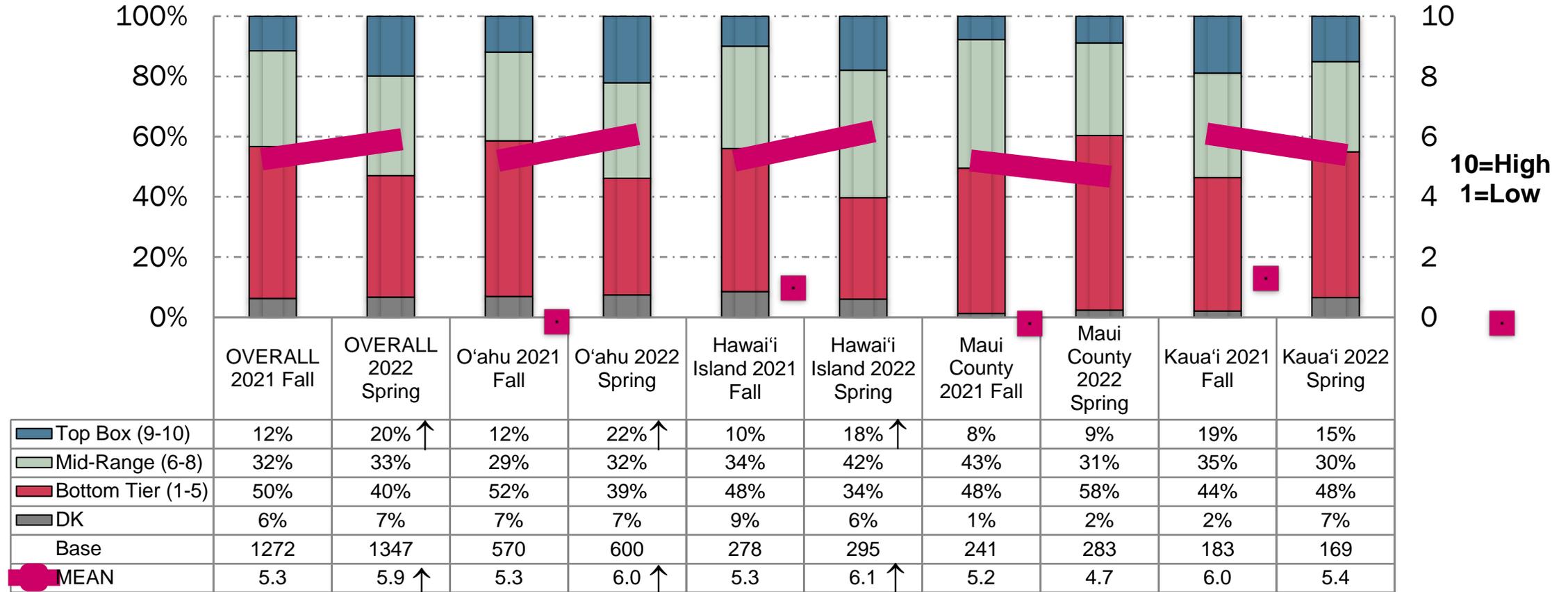
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HTA: Aware of Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns - *By Island*



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

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



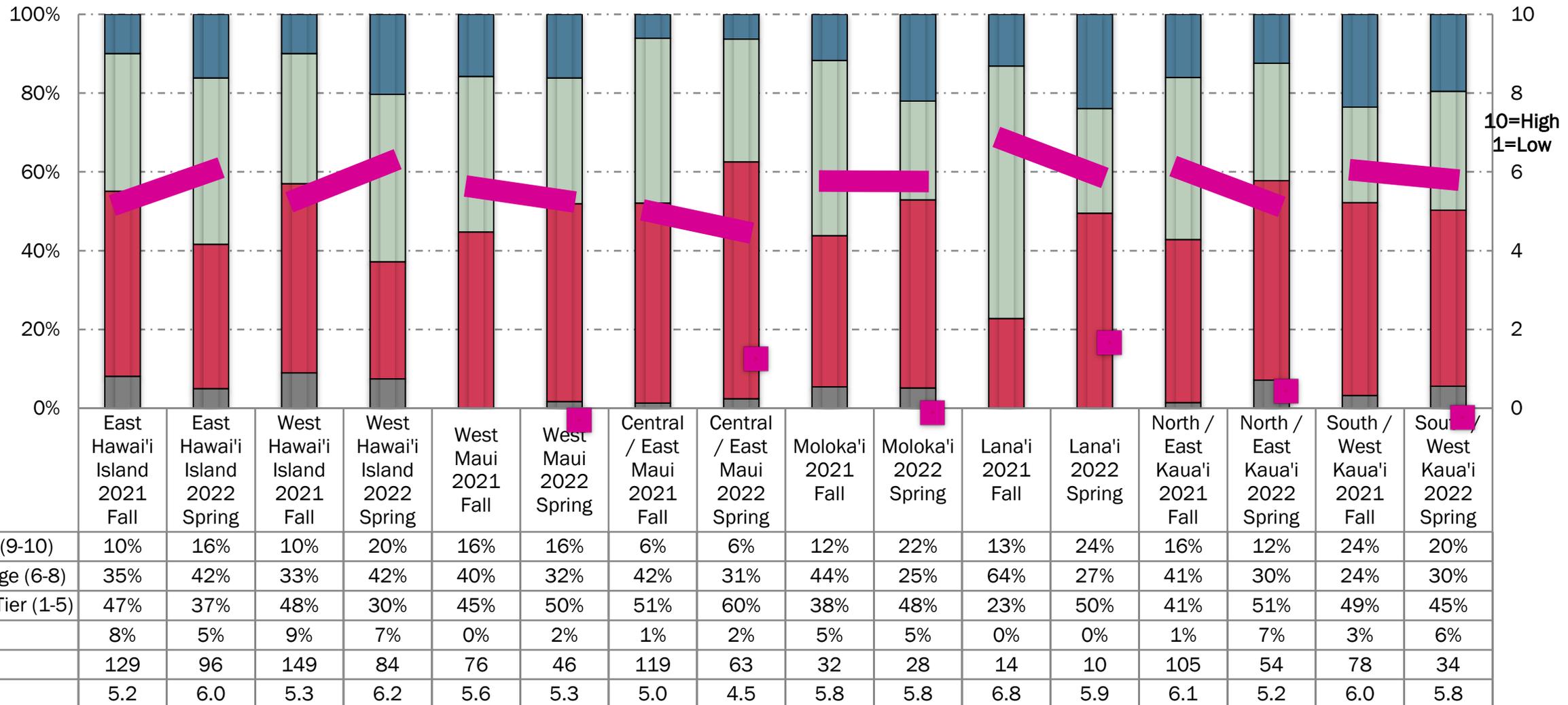
Q9b. In your opinion, how well has the Hawai‘i Tourism Authority (HTA) carried out these responsibilities. Using a scale of 1 to 10 where 10 means you think the Hawai‘i Tourism Authority (HTA) is doing an Excellent job and 1 means you think that HTA is doing a Poor job, how would you rate the job the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

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



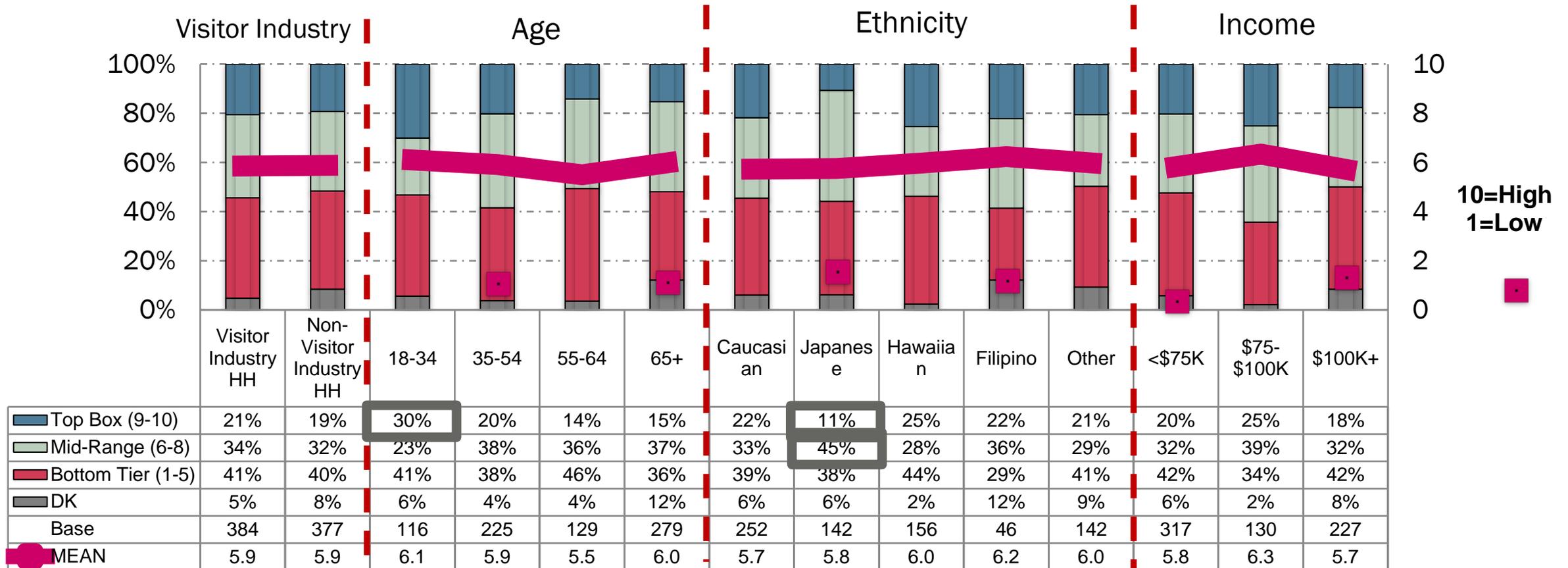
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“Communicating with and listening to, Hawai‘i residents concerning tourism-related issues and concerns” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



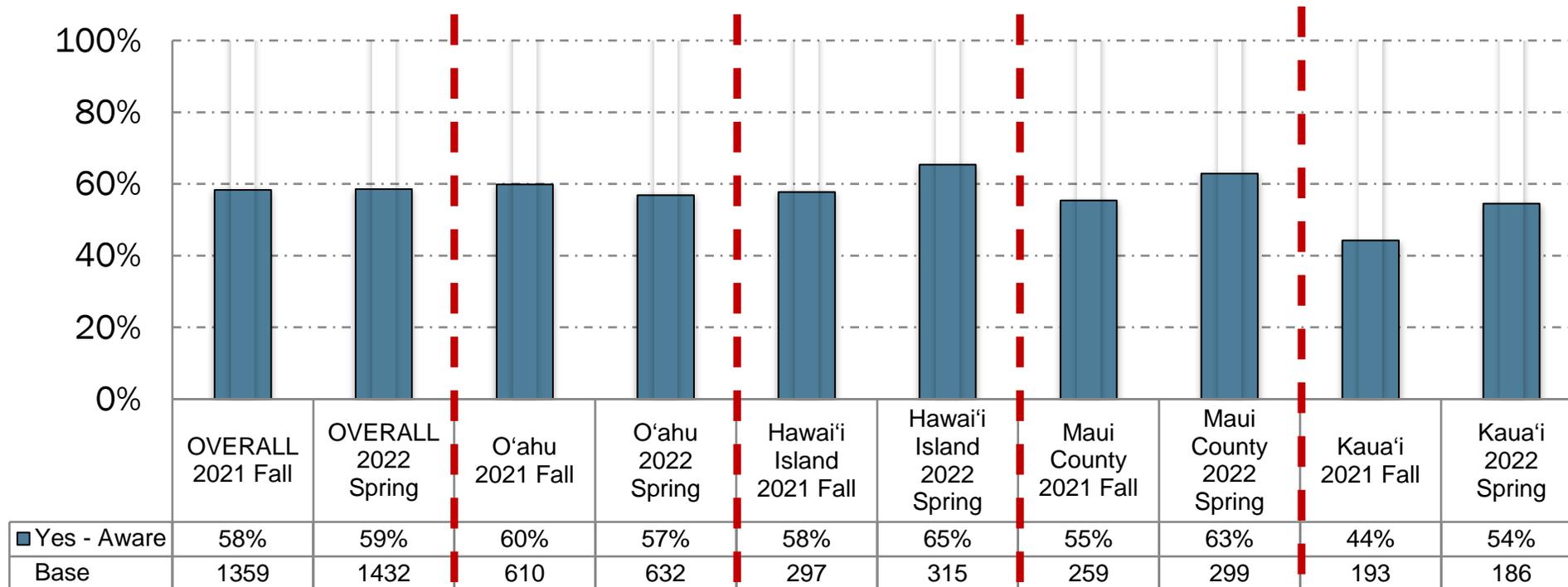
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“Communicating with and listening to, Hawai‘i residents concerning tourism-related issues and concerns” – *By Demographics*



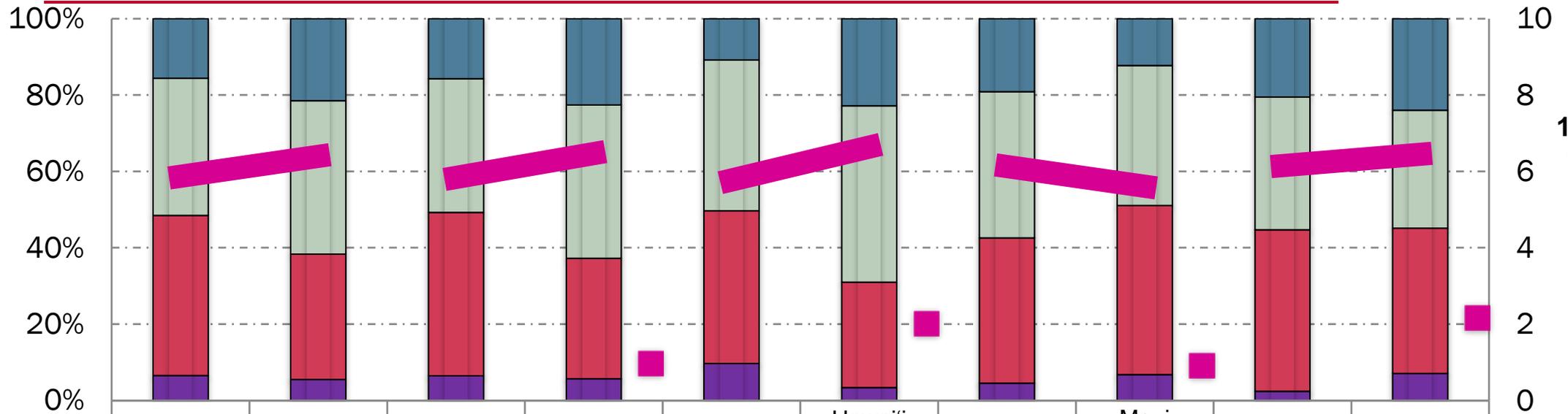
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HTA: Aware of Supporting and perpetuating Native Hawaiian culture, arts and places - *By Island*



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

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



	OVERALL 2021 Fall	OVERALL 2022 Spring	O‘ahu 2021 Fall	O‘ahu 2022 Spring	Hawai‘i Island 2021 Fall	Hawai‘i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua‘i 2021 Fall	Kaua‘i 2022 Spring
■ Top Box (9-10)	16%	21% ↑	16%	23% ↑	11%	23% ↑	19%	12%	21%	24%
■ Mid-Range (6-8)	36%	40%	35%	40%	40%	46%	38%	37%	35%	31%
■ Bottom Tier (1-5)	42%	33%	43%	32%	40%	28%	38%	44%	42%	38%
■ DK/Rf	7%	6%	6%	6%	10%	3%	5%	7%	2%	7%
Base	1272	1347	570	600	278	295	241	283	183	169
■ MEAN	5.9	6.4 ↑	5.8	6.5 ↑	5.8	6.6 ↑	6.1	5.6	6.1	6.5

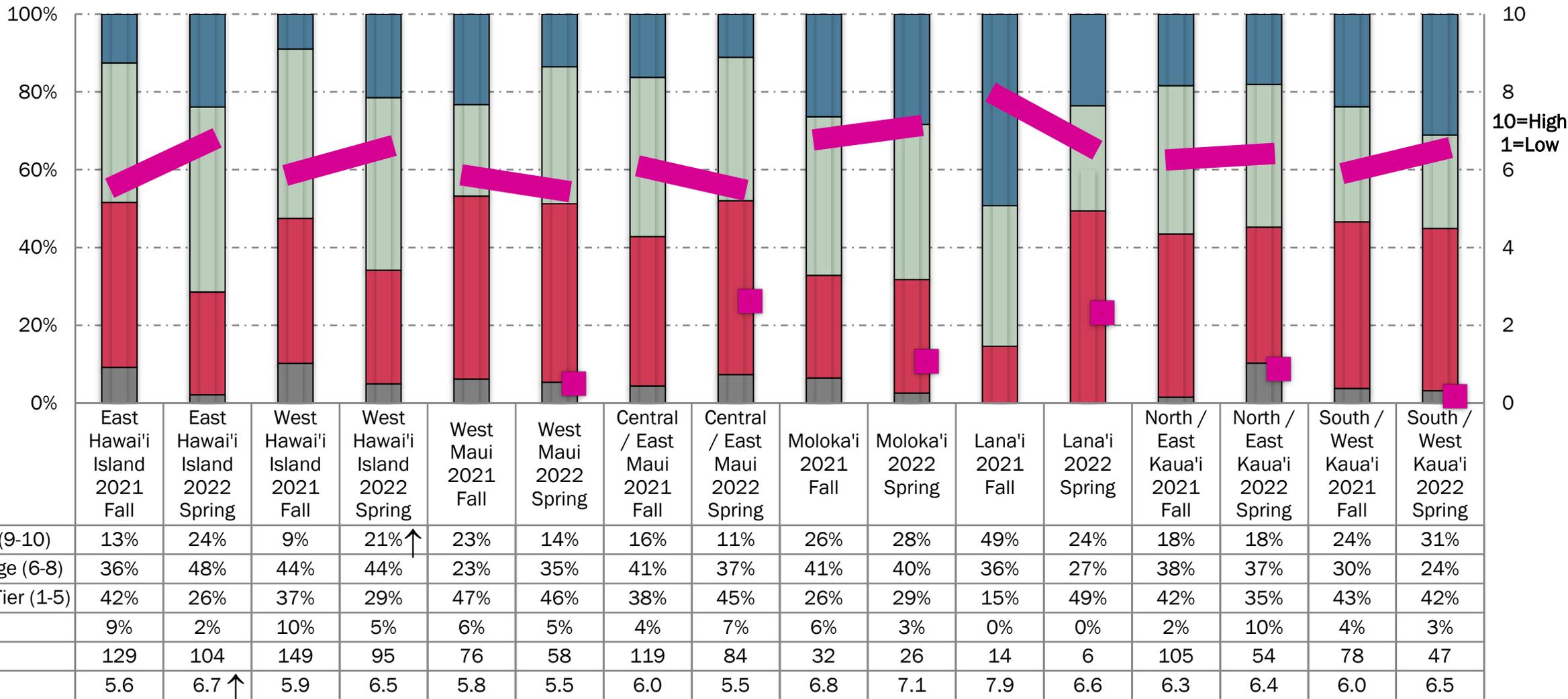
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“Supporting and perpetuating Native Hawaiian culture, arts and places” - *By Area (O’ahu)*



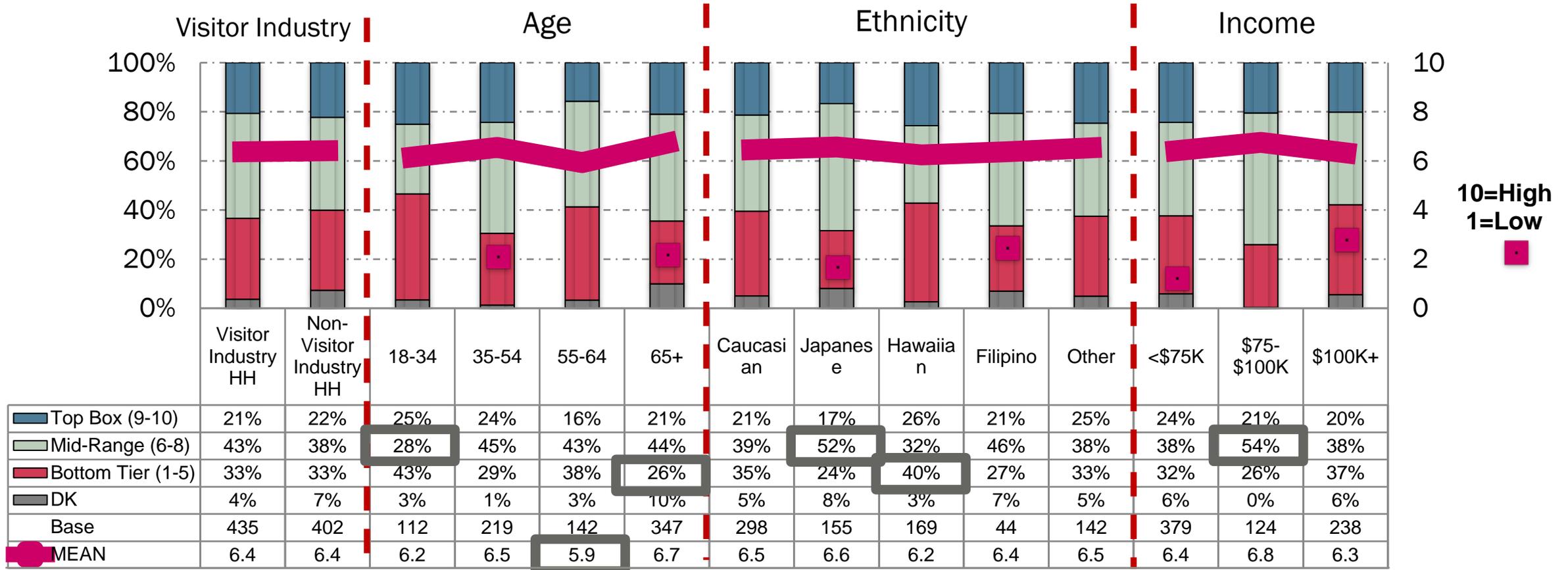
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“Supporting and perpetuating Native Hawaiian culture, arts and places” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



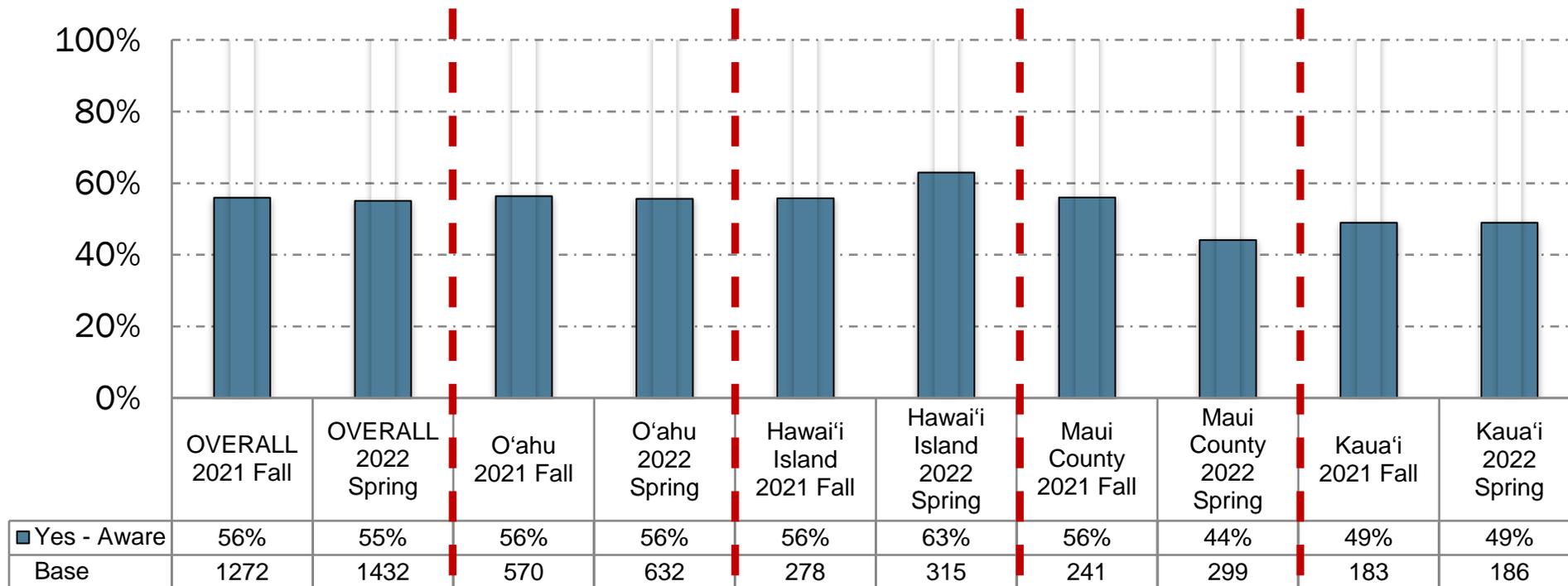
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“Supporting and perpetuating Native Hawaiian culture, arts and places” – *By Demographics*



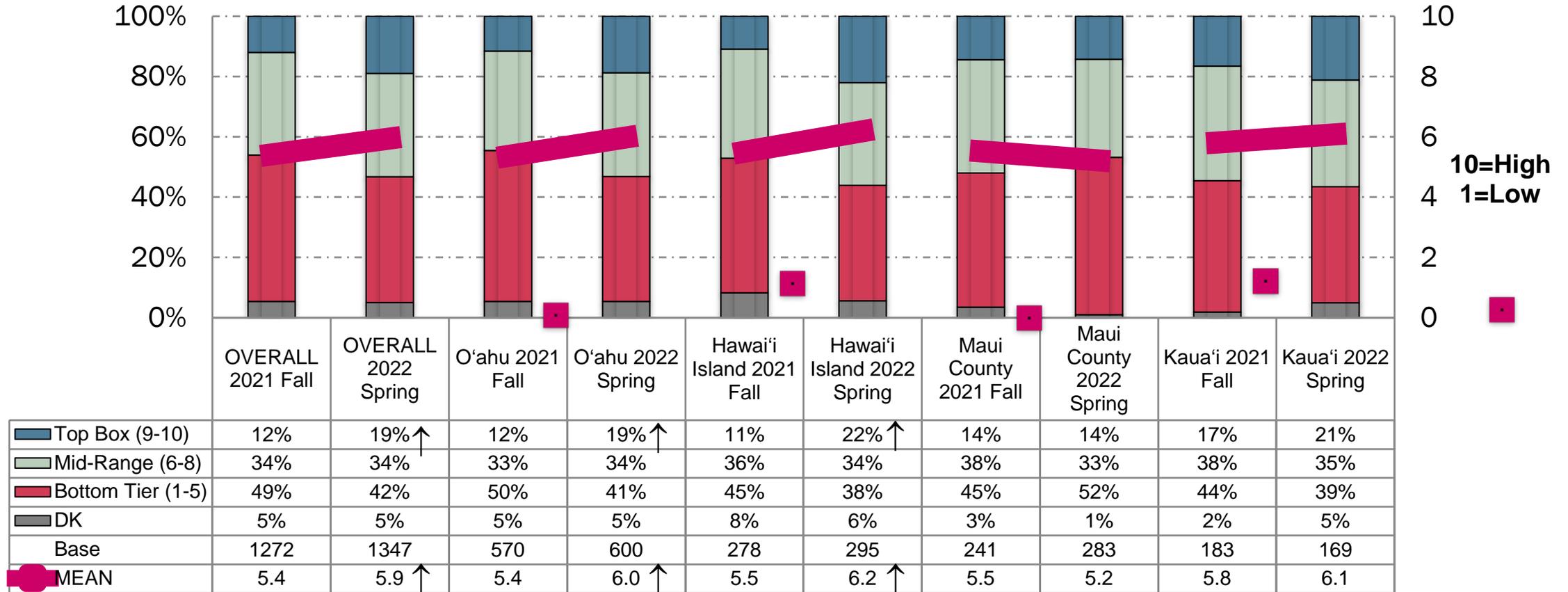
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HTA: Aware of Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources - *By Island*



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

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



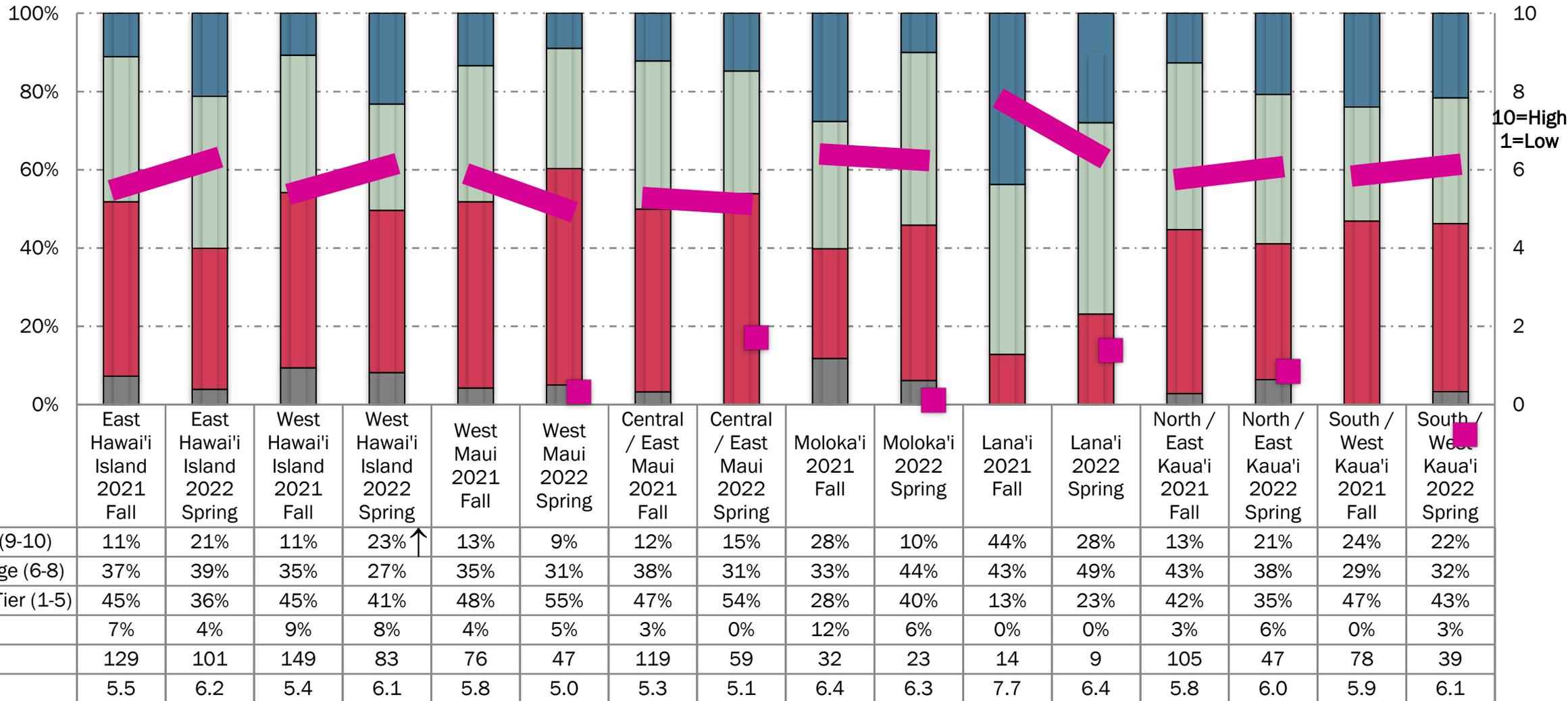
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“Balancing the needs of residents with expectations of visitors and protection of Hawai‘i's natural resources” - *By Area (O‘ahu)*



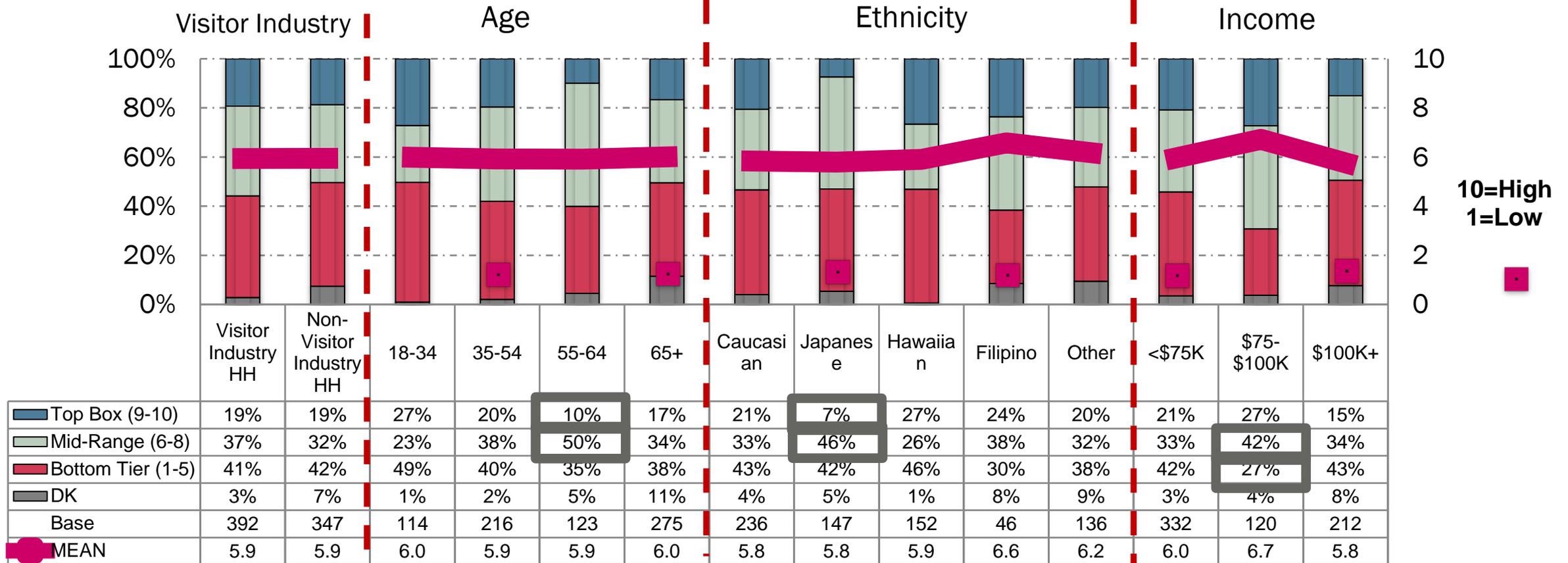
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“Balancing the needs of residents with expectations of visitors and protection of Hawai‘i's natural resources” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



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

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

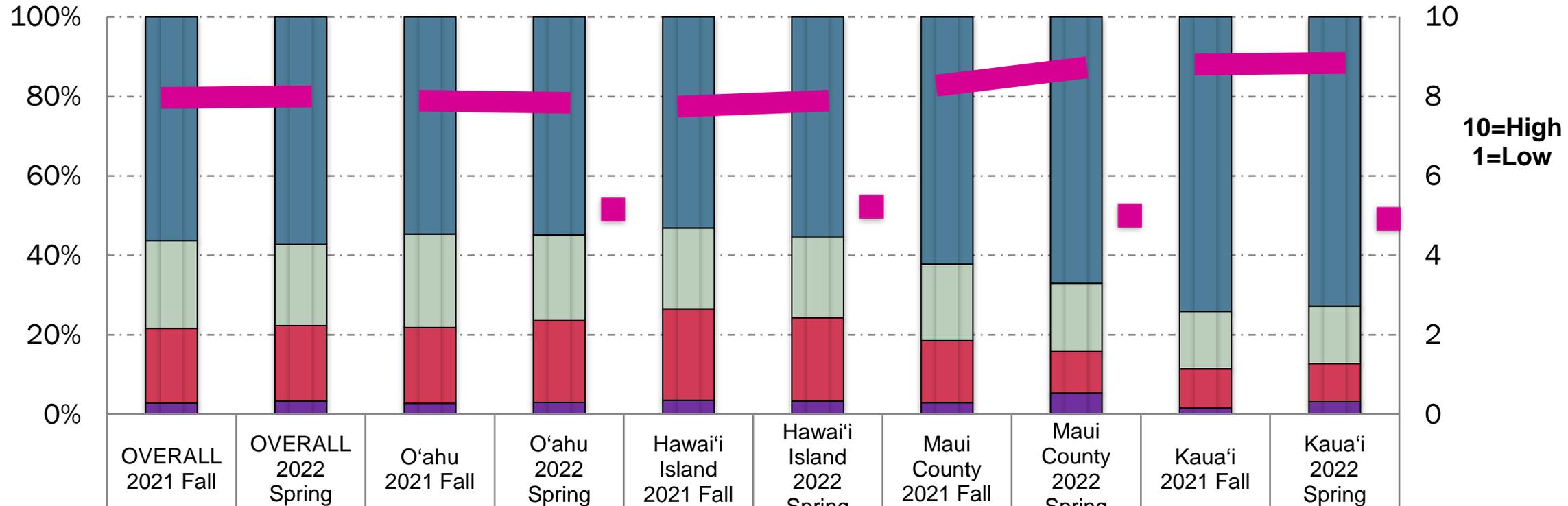


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Managed Tourism Strategies (Fall 2021 and Spring 2022)

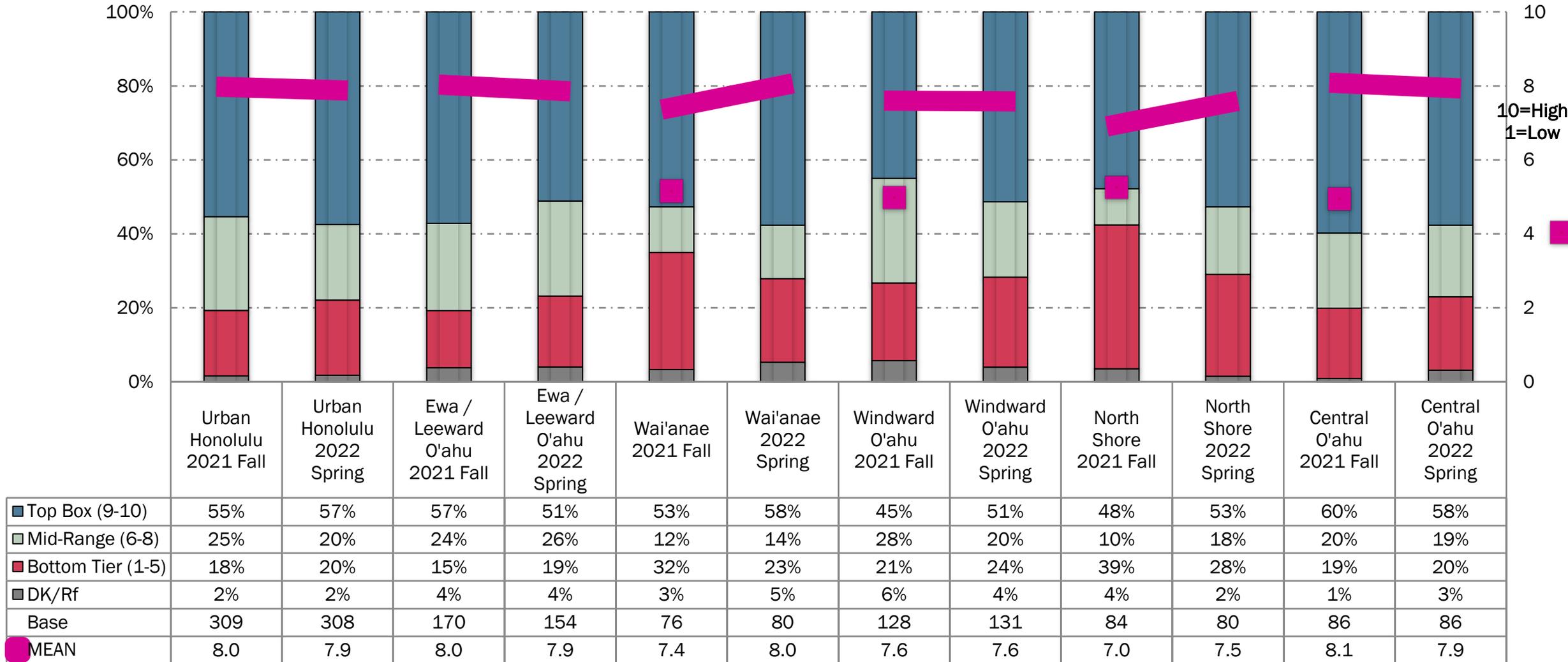
“Eliminate illegal vacation rentals on my island” – *By Island*



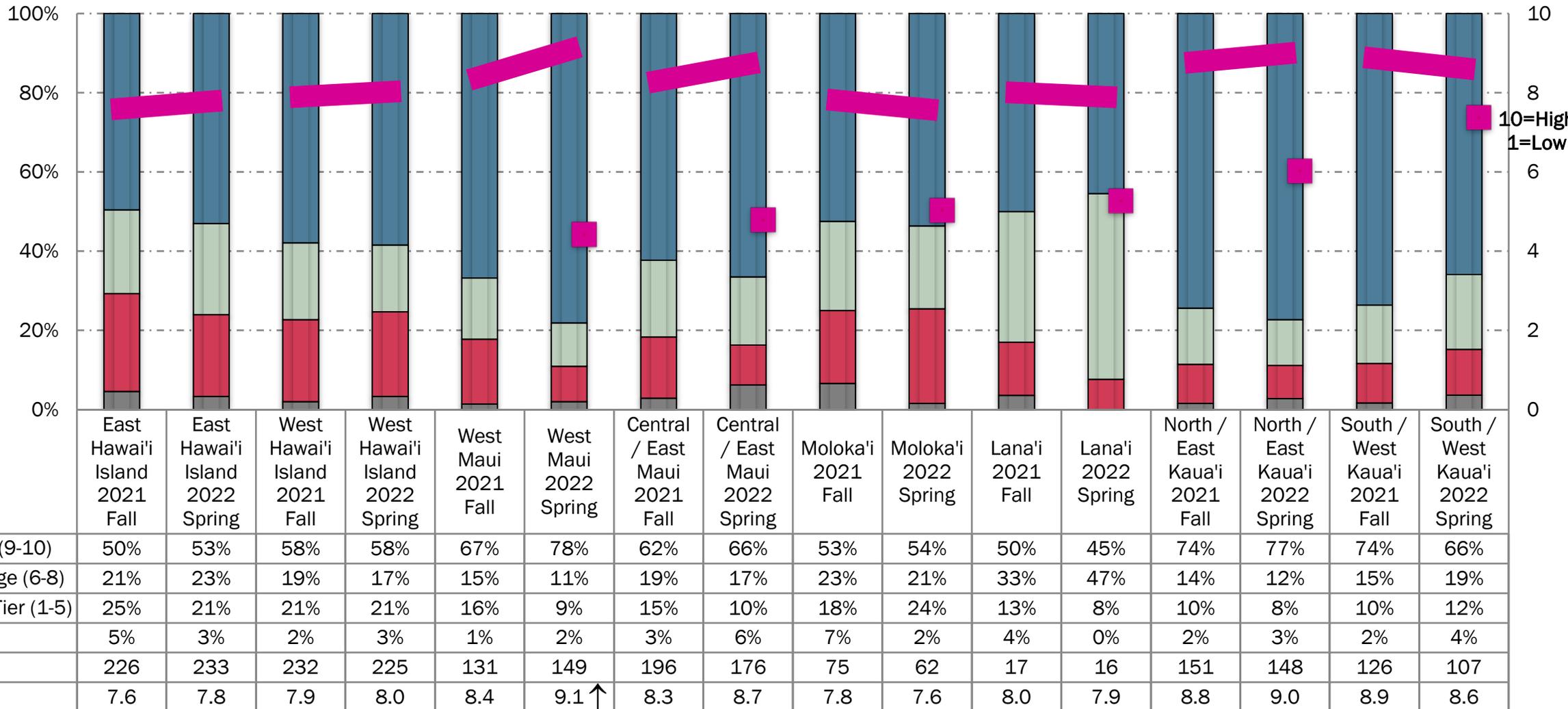
	OVERALL 2021 Fall	OVERALL 2022 Spring	O‘ahu 2021 Fall	O‘ahu 2022 Spring	Hawai‘i Island 2021 Fall	Hawai‘i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua‘i 2021 Fall	Kaua‘i 2022 Spring
■ Top Box (9-10)	56%	57%	55%	55%	53%	55%	62%	67%	74%	73%
■ Mid-Range (6-8)	22%	20%	23%	21%	20%	20%	19%	17%	14%	14%
■ Bottom Tier (1-5)	19%	19%	19%	21%	23%	21%	16%	10%	10%	10%
■ DK/Rf	3%	3%	3%	3%	4%	3%	3%	5%	2%	3%
Base	2007	1955	853	839	458	458	419	403	277	255
■ MEAN	8.0	8.0	7.9	7.8	7.8	7.9	8.3	8.7	8.8	8.8

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

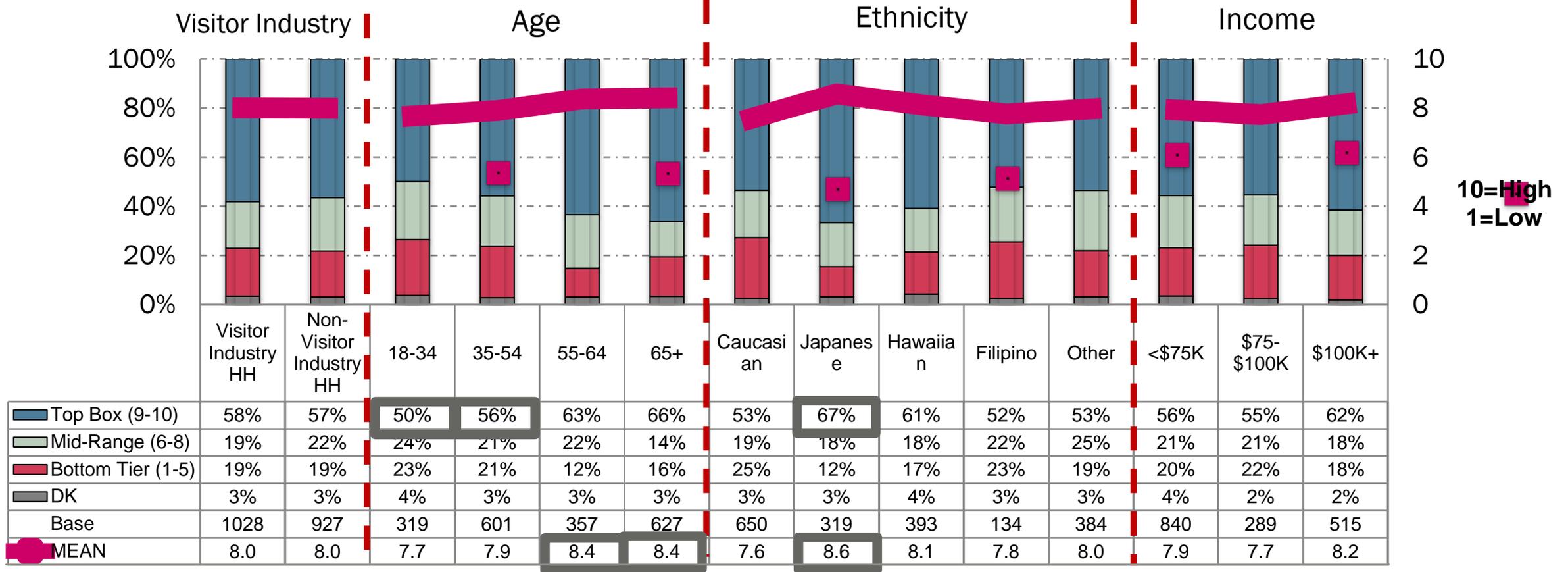
“Eliminate illegal vacation rentals on my island” - *By Area (O’ahu)*



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

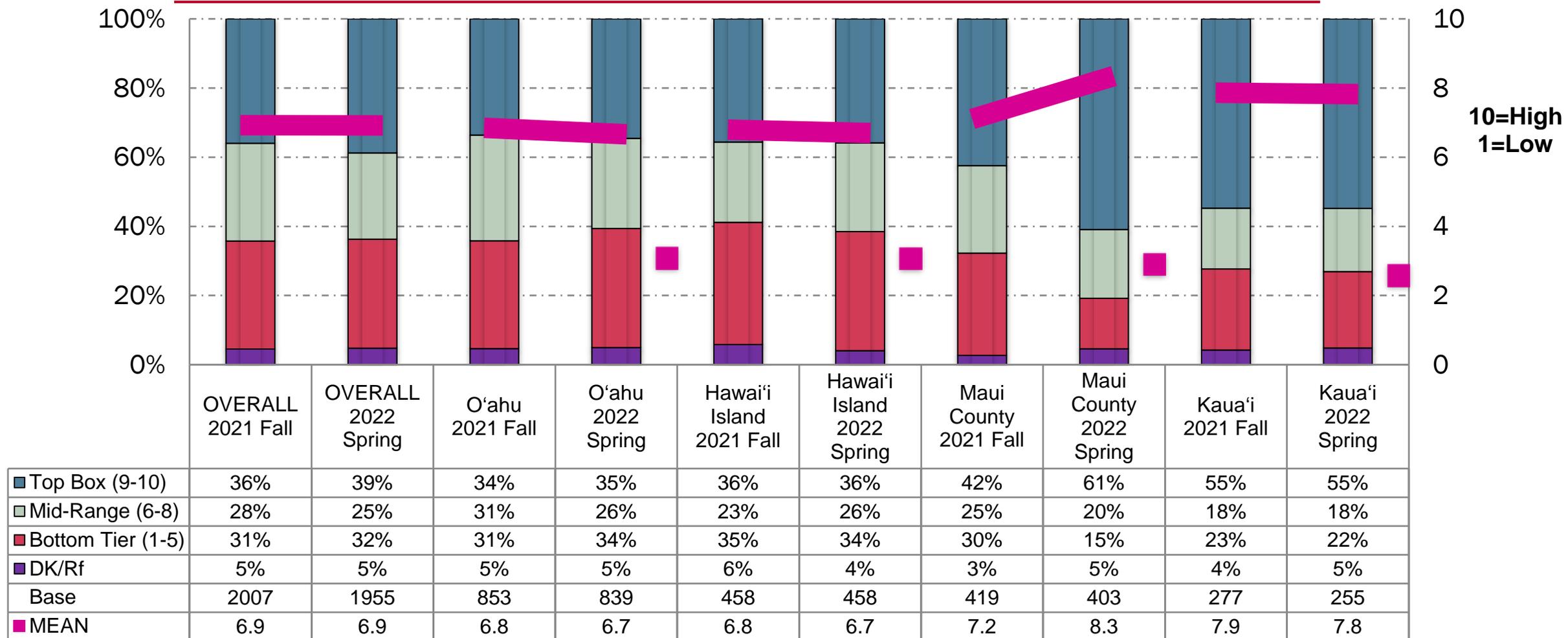


“Eliminate illegal vacation rentals on my island” – *By Demographics*



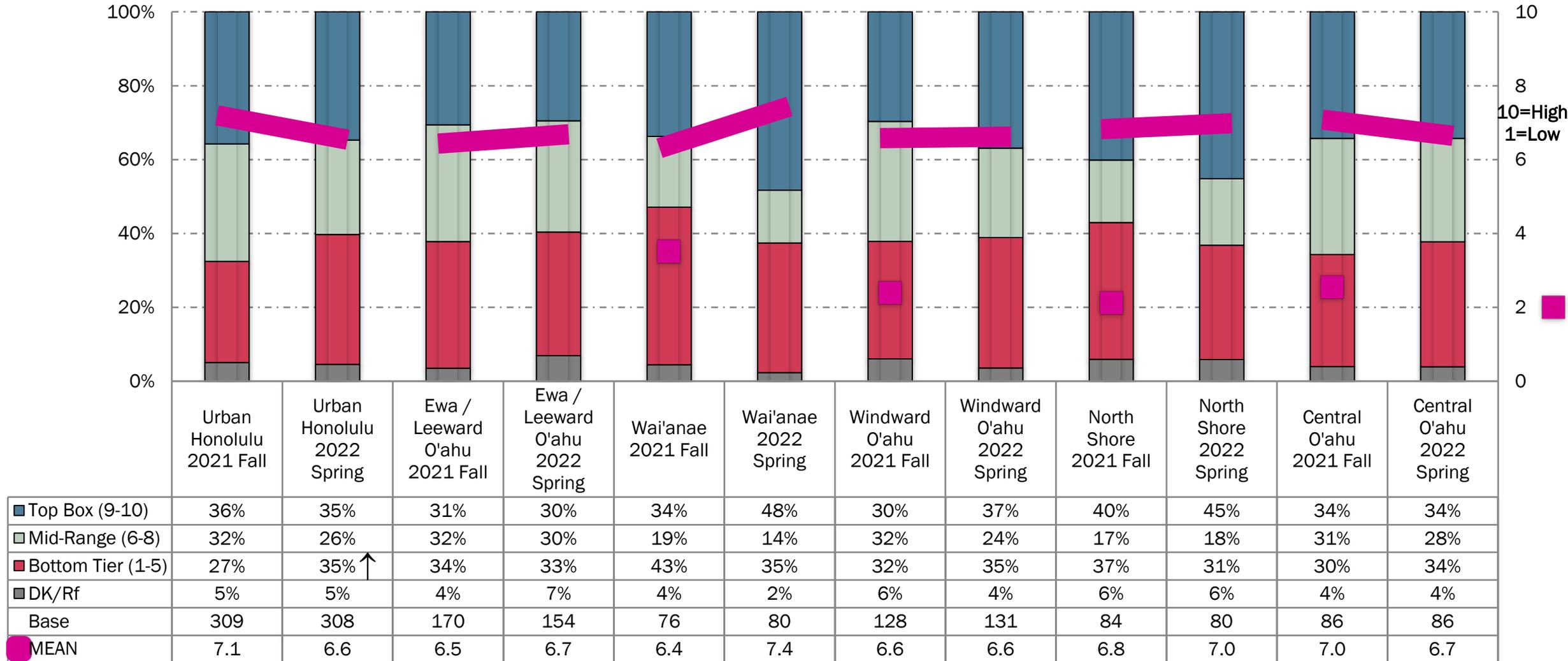
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



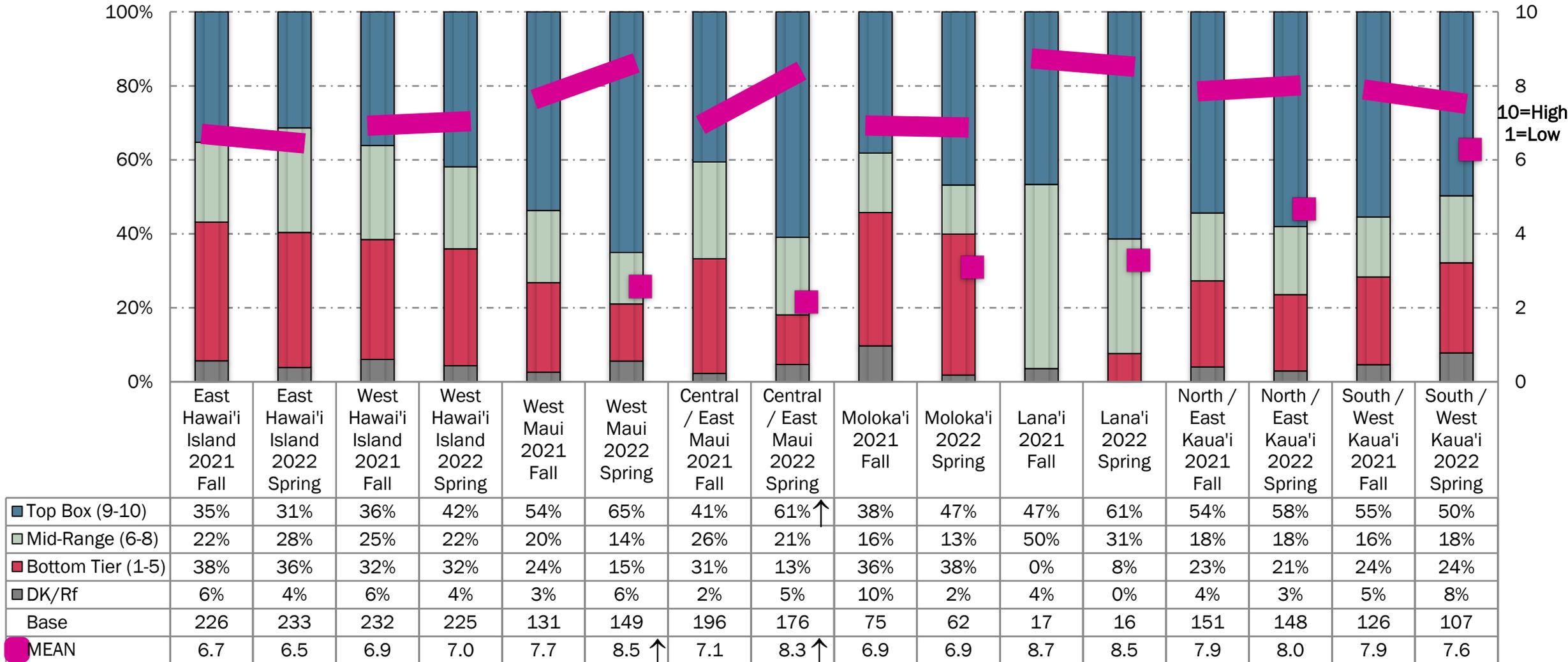
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



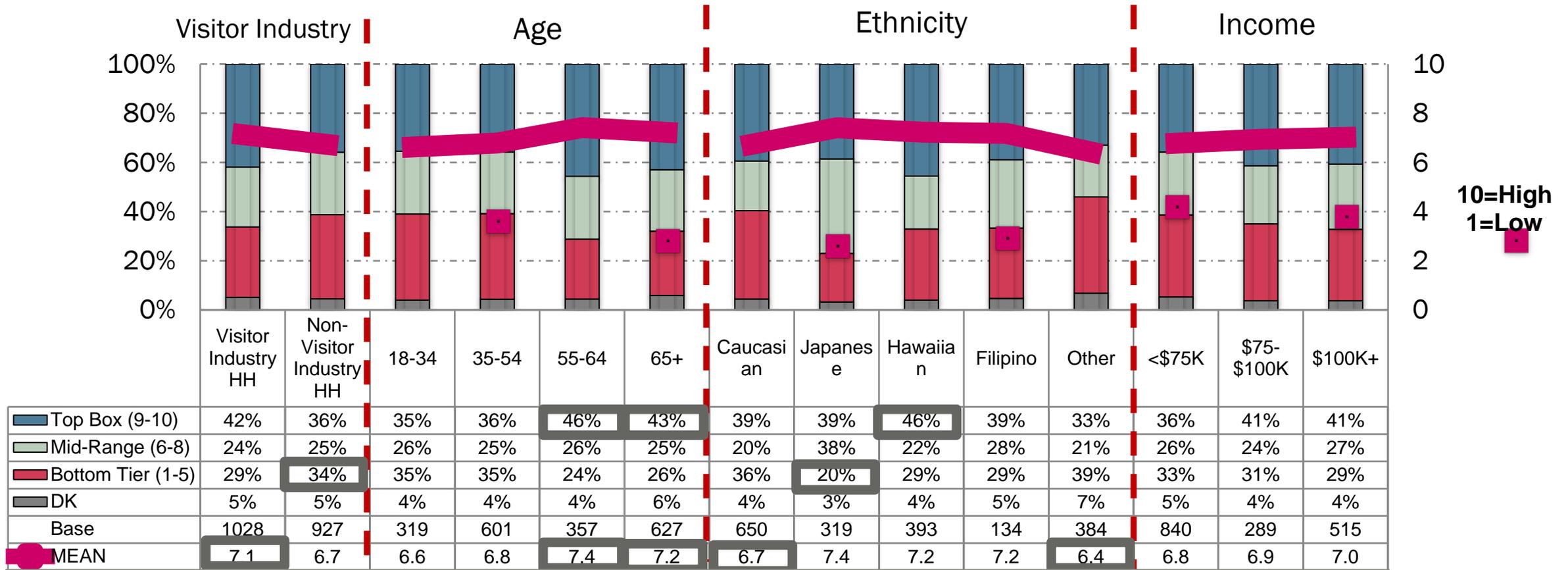
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



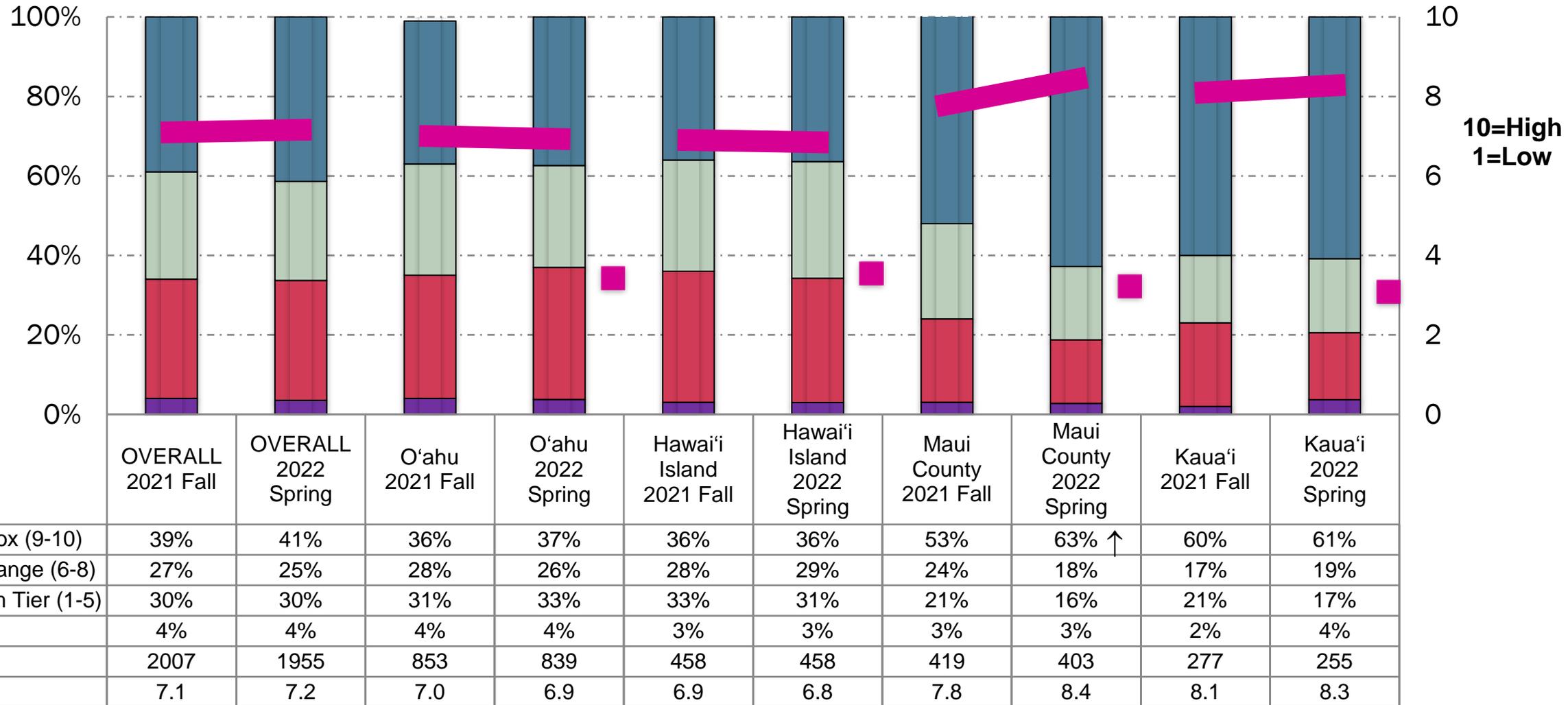
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“Stop approval of additional legal vacation rentals on my island” – By Demographics



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

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

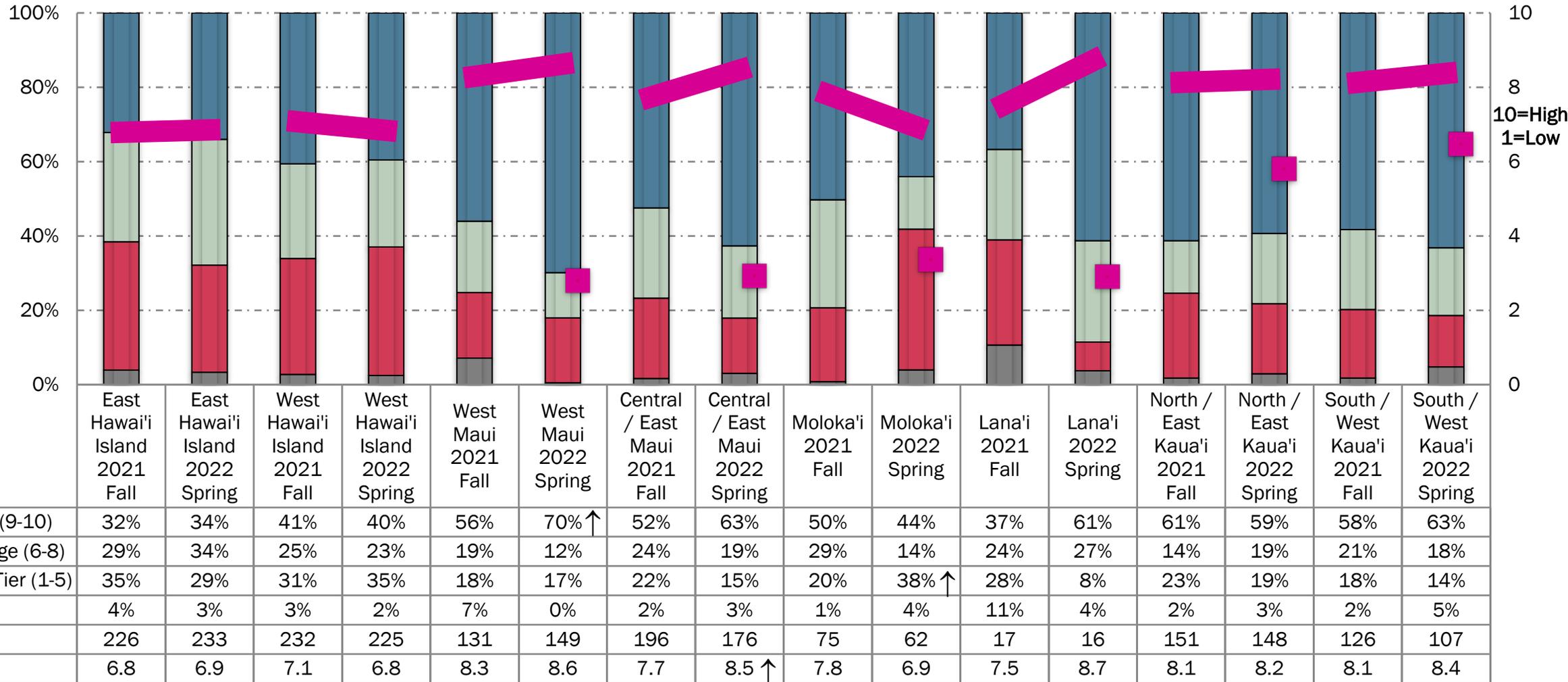


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

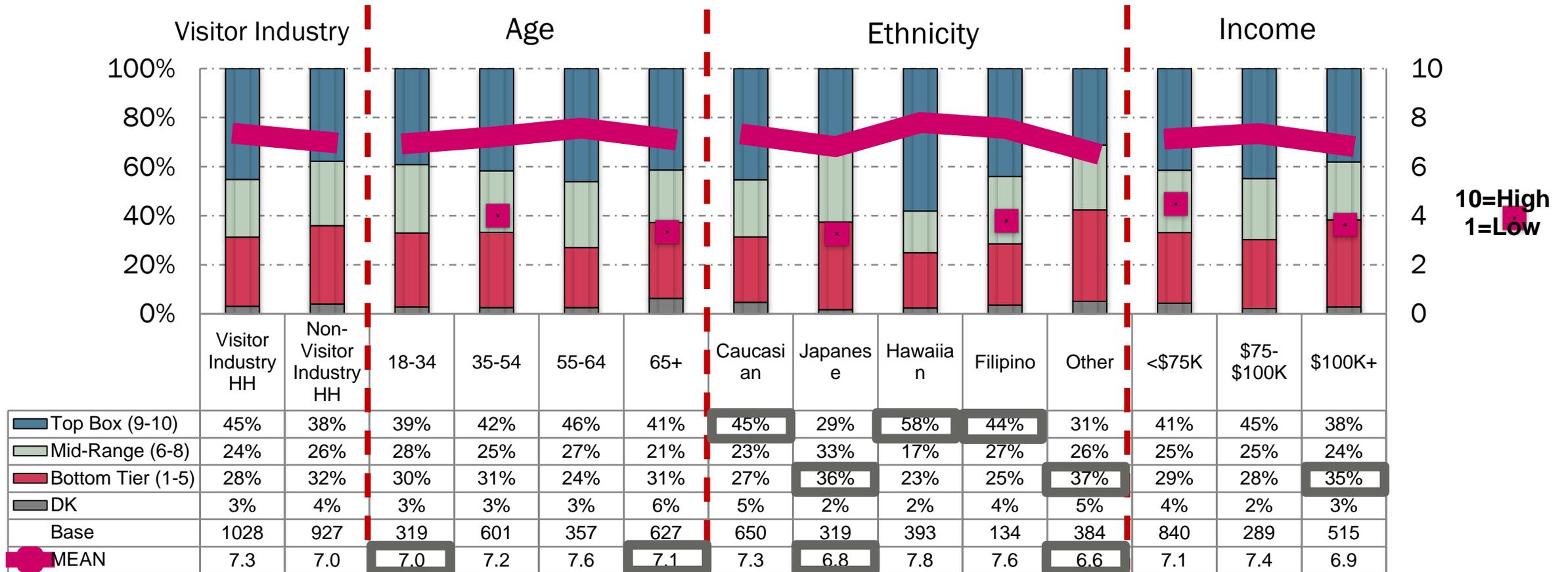


“Do not allow building of additional hotel/condo/timeshare units on my island” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



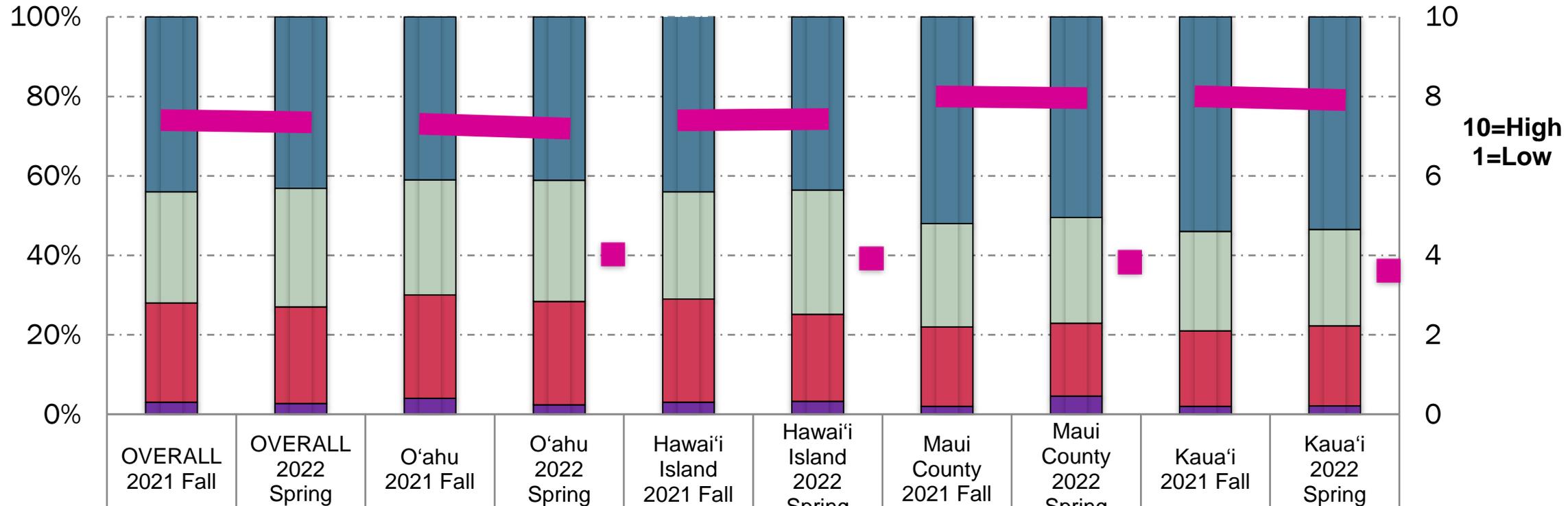
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“Do not allow building of additional hotel/condo/timeshare units on my island” – *By Demographics*



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

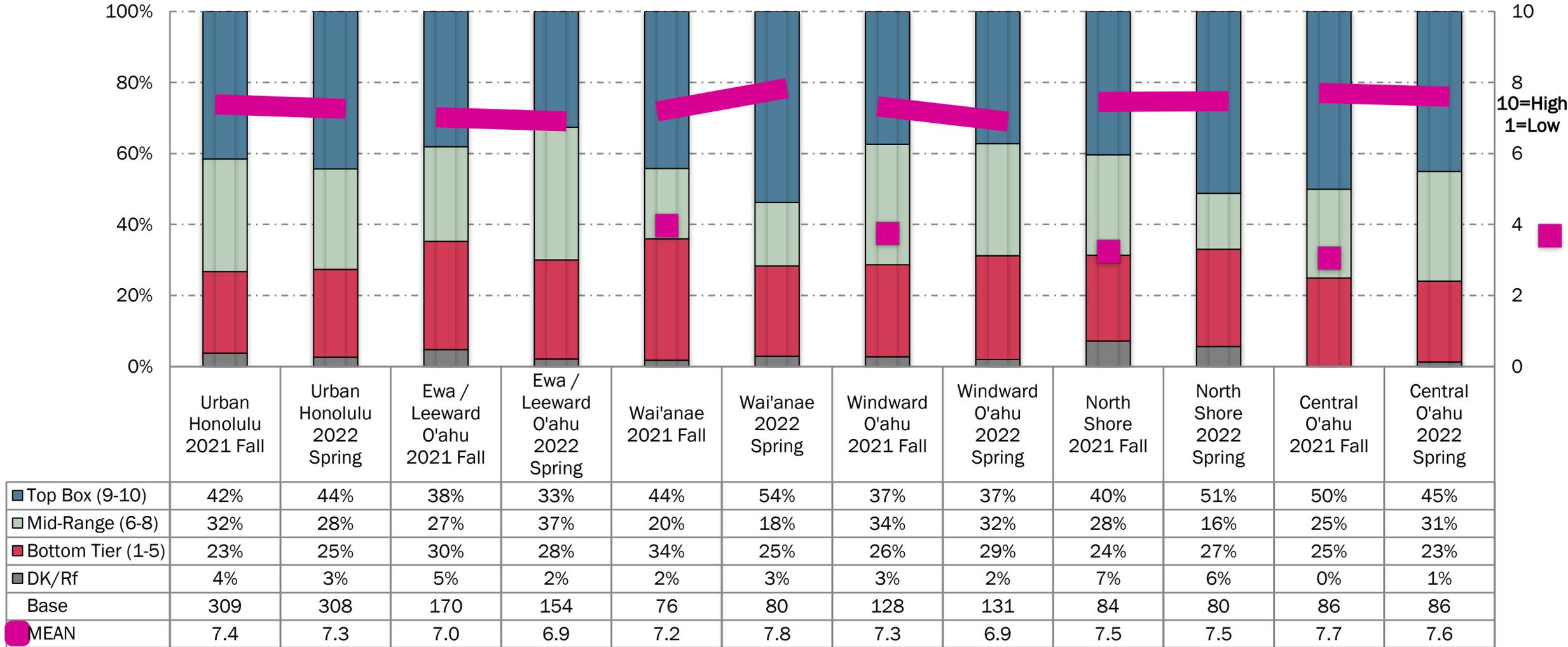
“Charge visitor access fees to state parks and trails” – *By Island*



	OVERALL 2021 Fall	OVERALL 2022 Spring	O'ahu 2021 Fall	O'ahu 2022 Spring	Hawai'i Island 2021 Fall	Hawai'i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua'i 2021 Fall	Kaua'i 2022 Spring
■ Top Box (9-10)	44%	43%	41%	41%	45%	44%	52%	50%	54%	54%
■ Mid-Range (6-8)	28%	30%	29%	30%	27%	31%	26%	27%	25%	24%
■ Bottom Tier (1-5)	25%	24%	26%	26%	26%	22%	20%	18%	19%	20%
■ DK/Rf	3%	3%	4%	2%	3%	3%	2%	5%	2%	2%
Base	2007	1955	853	839	458	458	419	403	277	255
■ MEAN	7.4	7.4	7.3	7.2	7.4	7.4	8.0	8.0	8.0	7.9

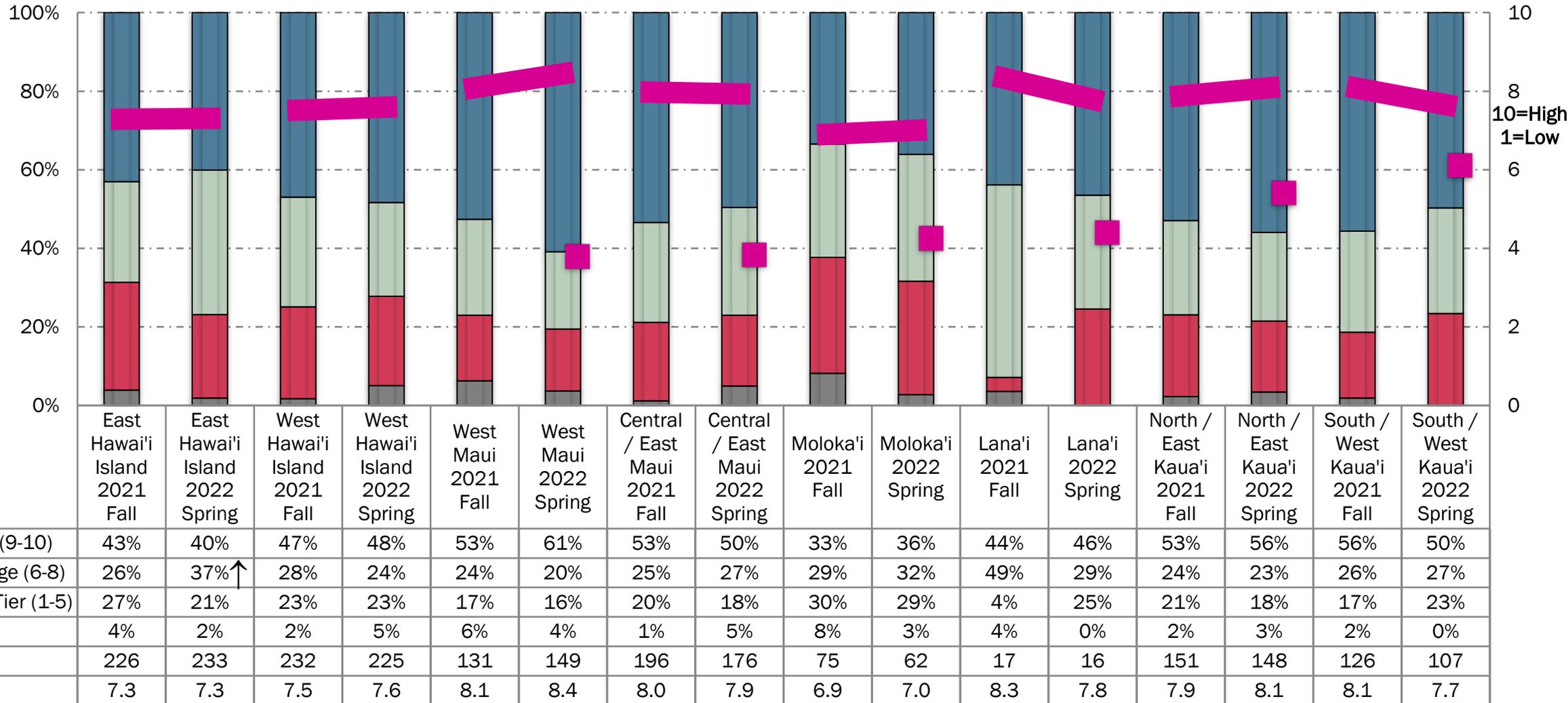
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

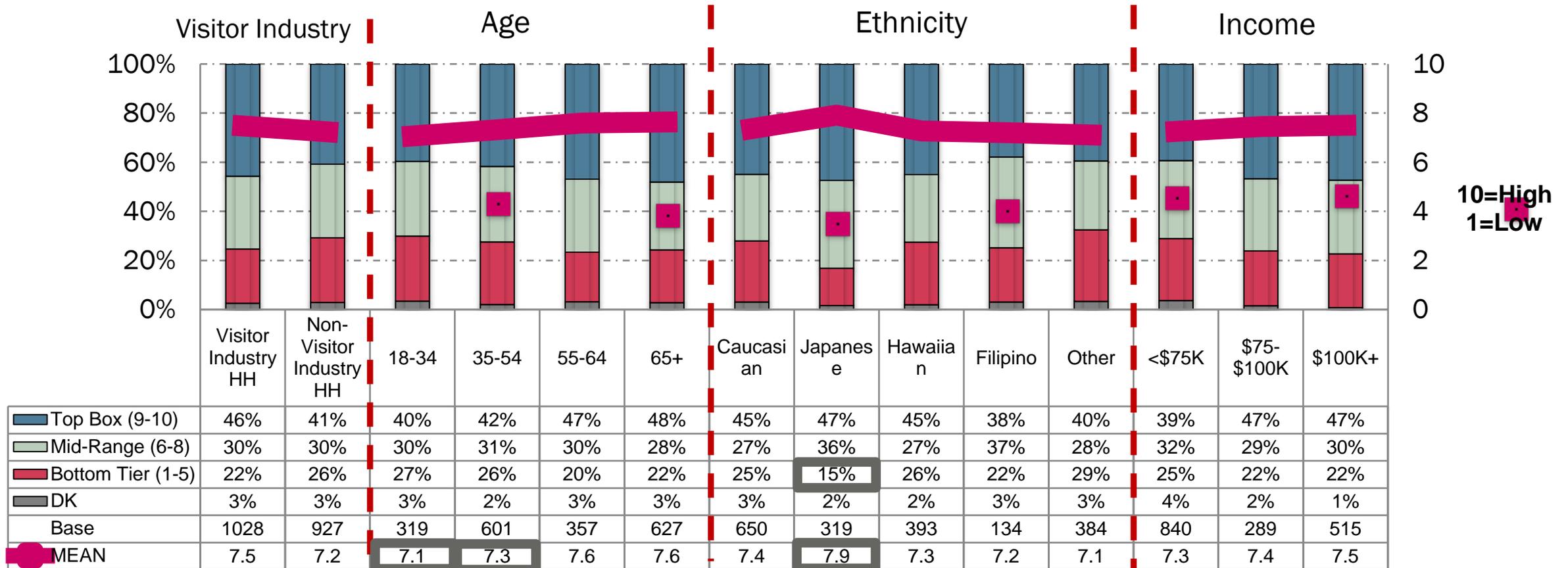


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

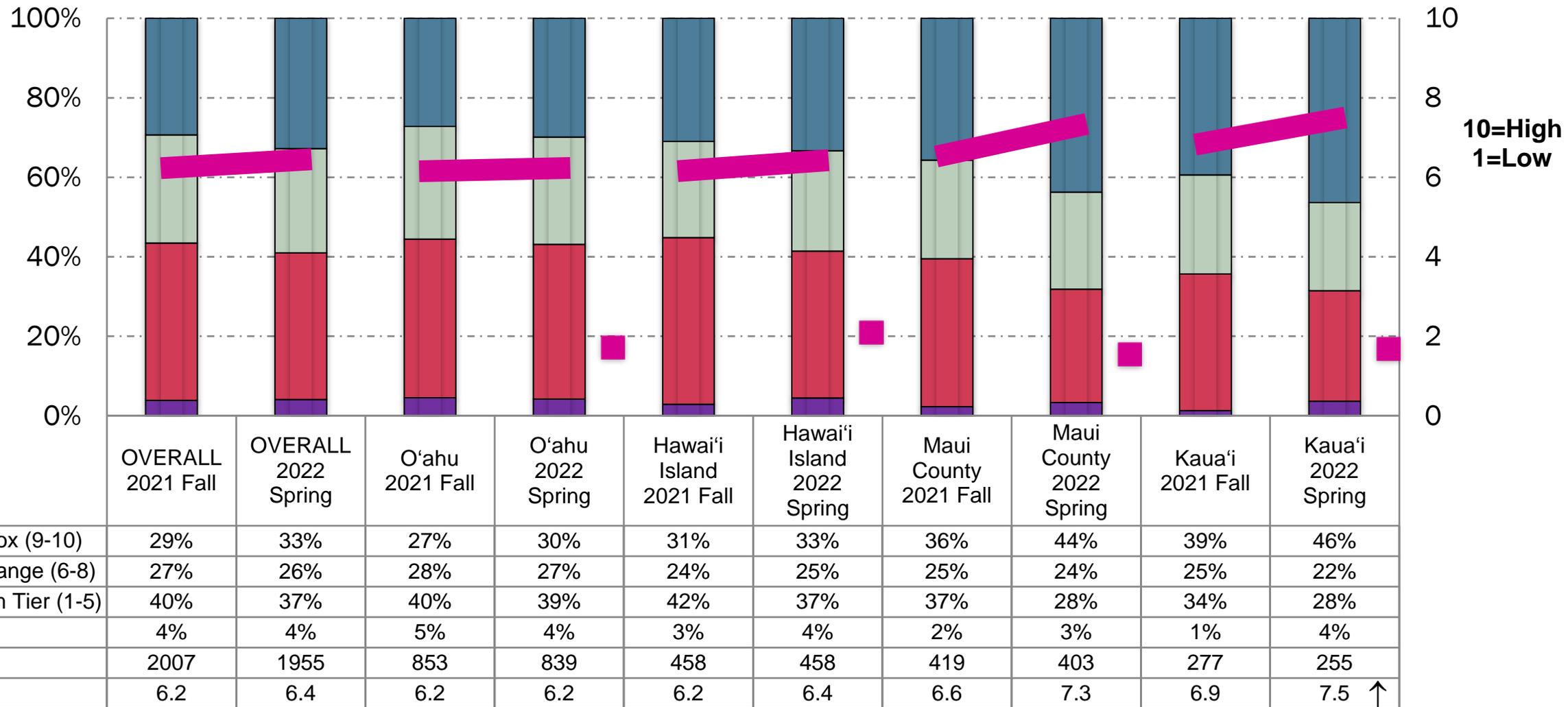


“Charge visitor access fees to state parks and trails” – *By Demographics*



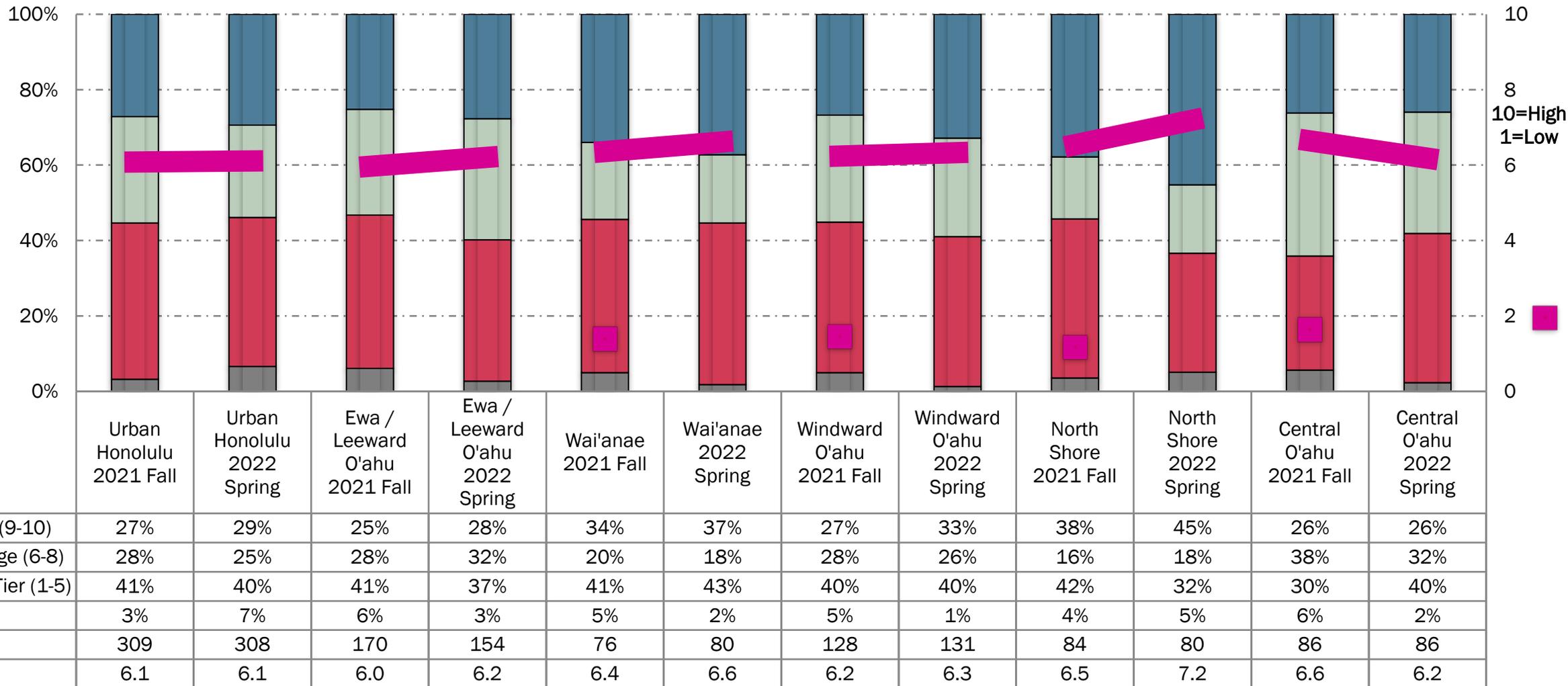
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



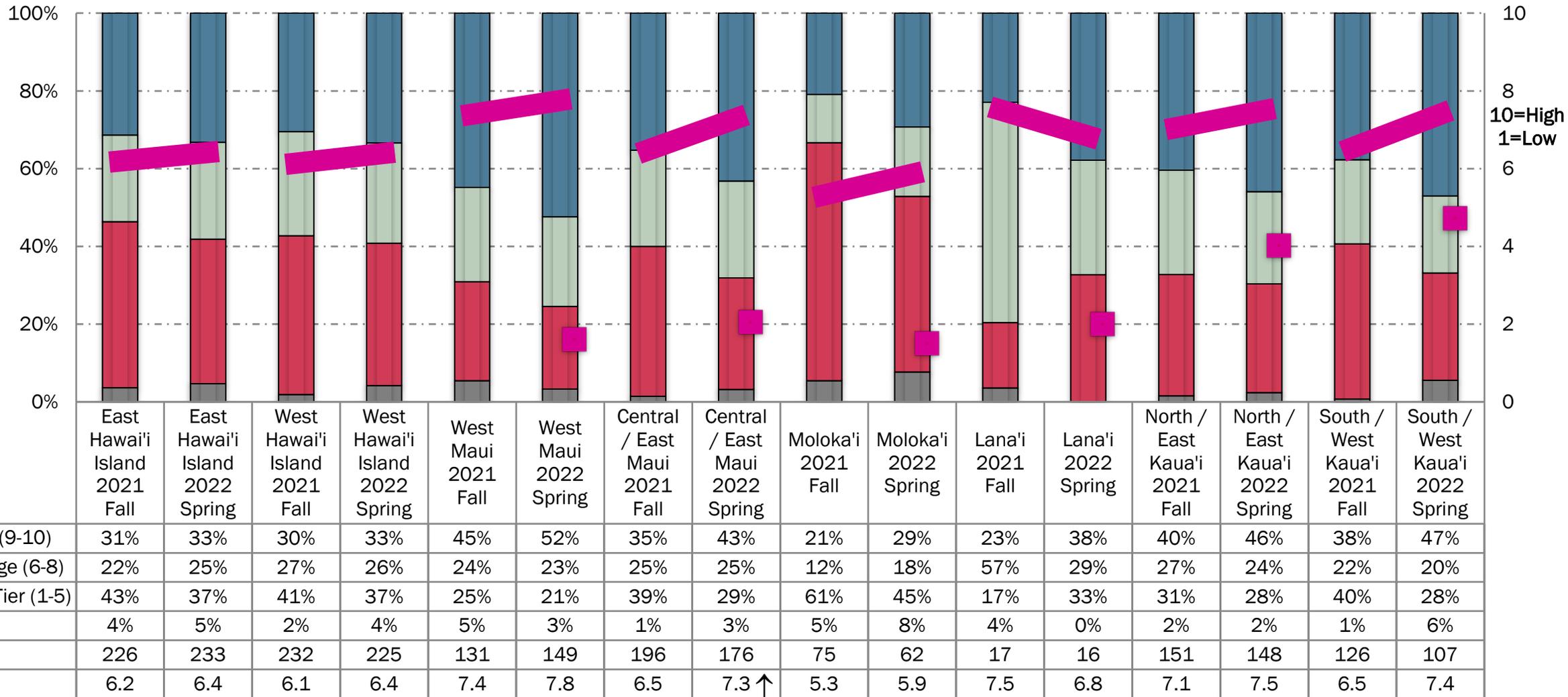
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“Designate resident-only days of the week at some state parks, beaches and trails” - *By Area (O‘ahu)*

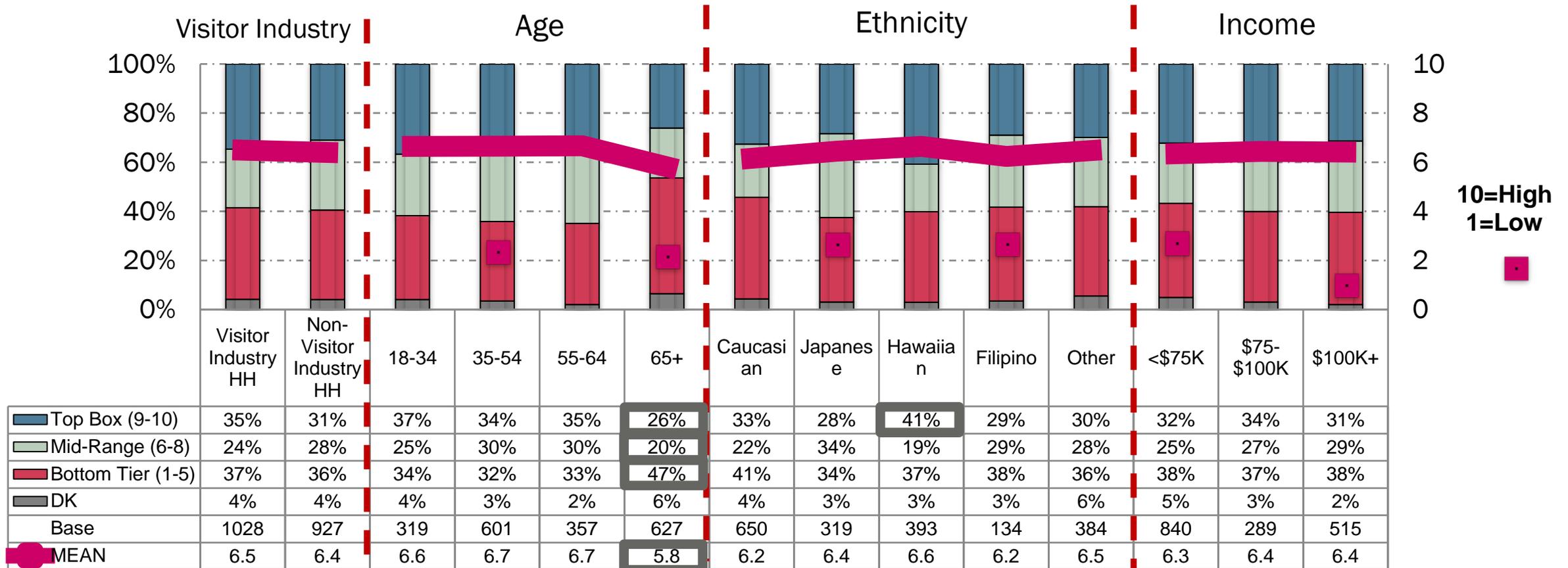


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“Designate resident-only days of the week at some state parks, beaches and trails” - *By Area (Hawai'i Island, Maui, & Kaua'i)*

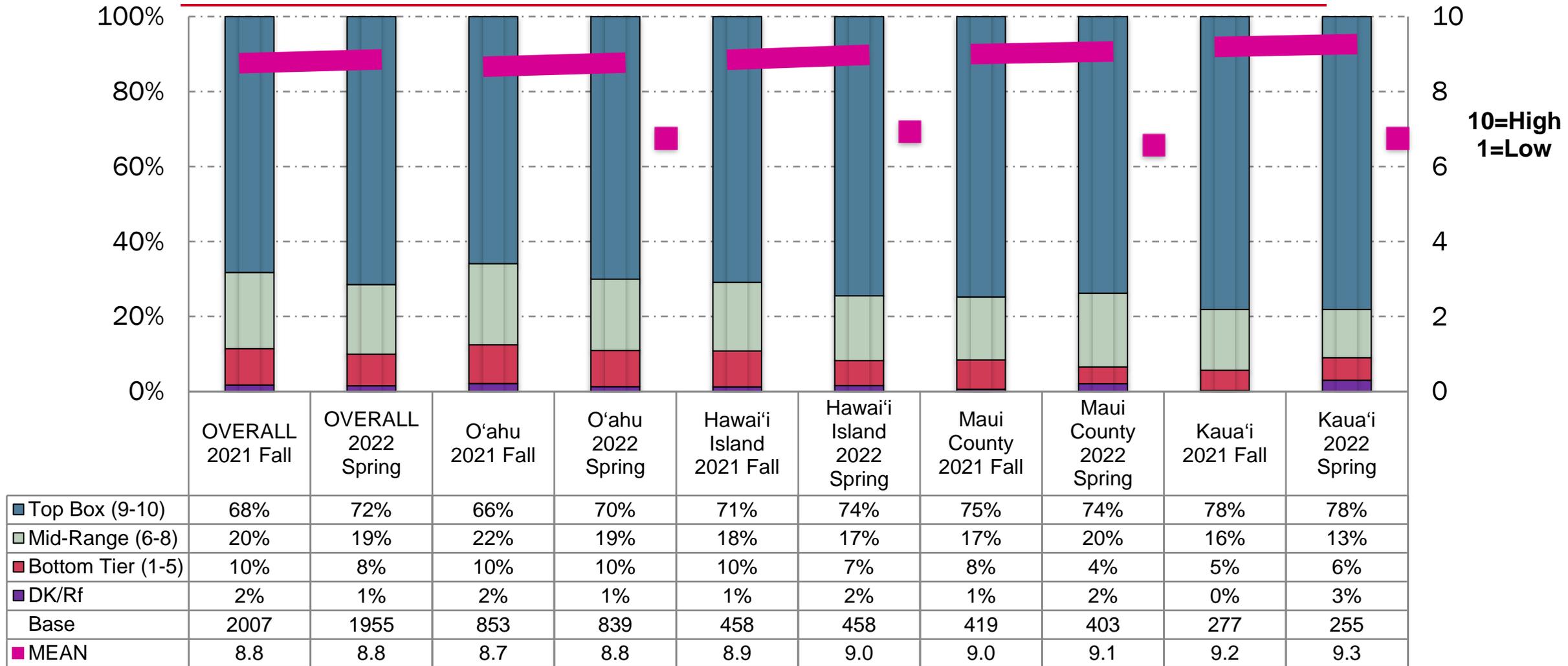


“Designate resident-only days of the week at some state parks, beaches and trails” – *By Demographics*



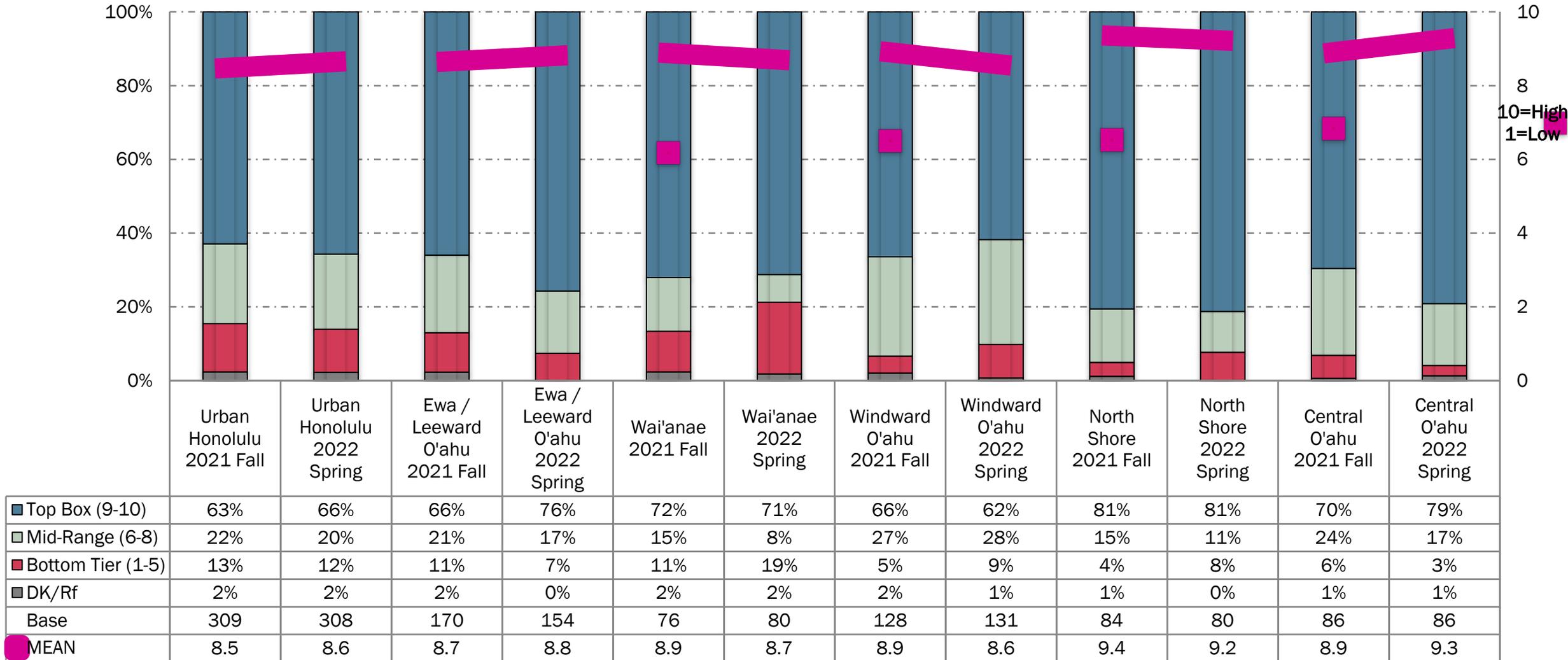
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“Educate visitors and residents to mālama the islands and each other” – *By Island*



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

“Educate visitors and residents to mālama the islands and each other” - *By Area (O’ahu)*



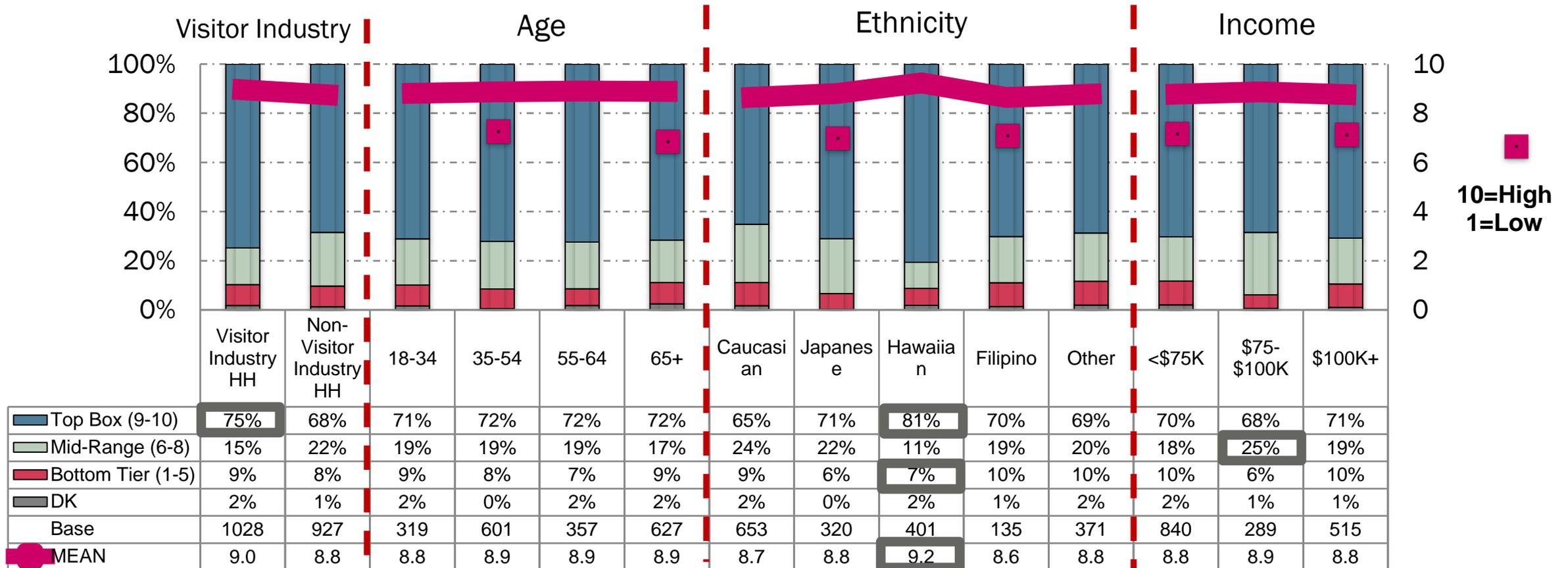
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“Educate visitors and residents to mālama the islands and each other” - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



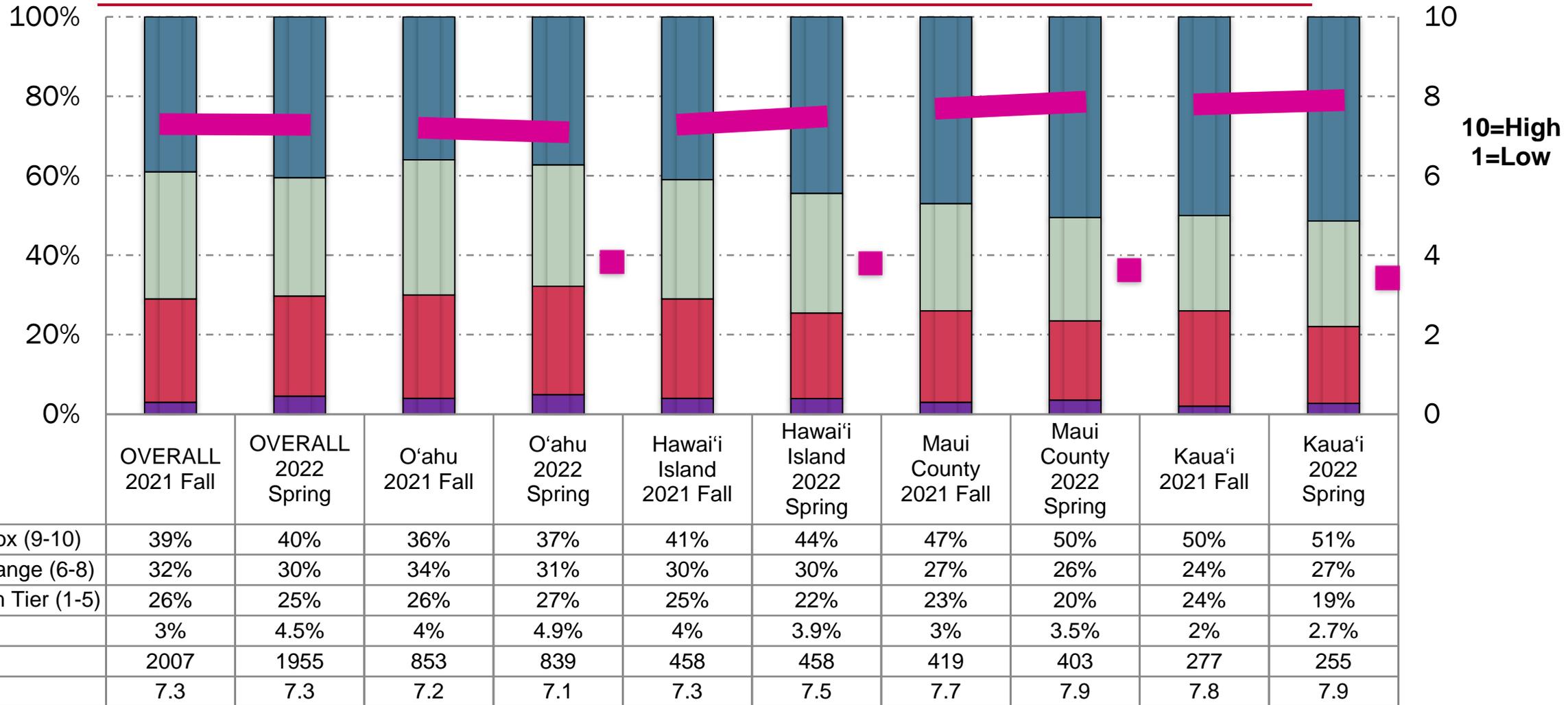
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“Educate visitors and residents to mālama the islands and each other” – *By Demographics*



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

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



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

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



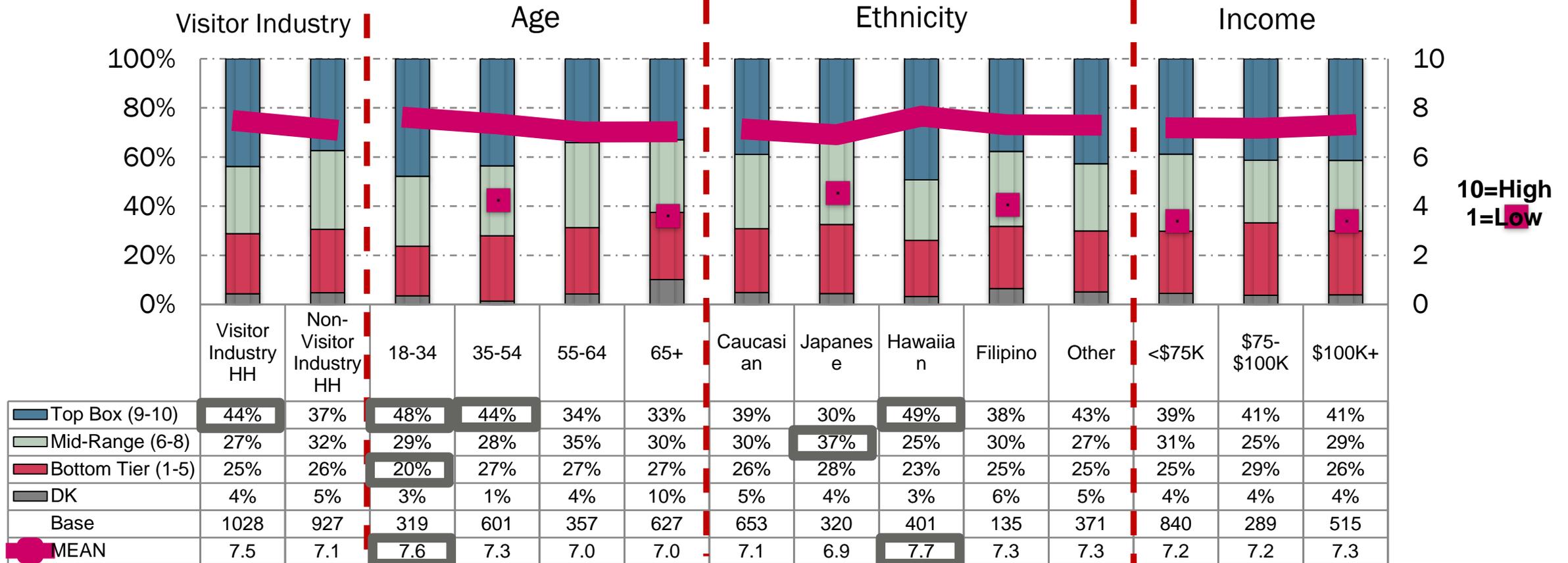
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



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

“Encourage visitors to volunteer and give back during their visits to Hawai‘i” – *By Demographics*

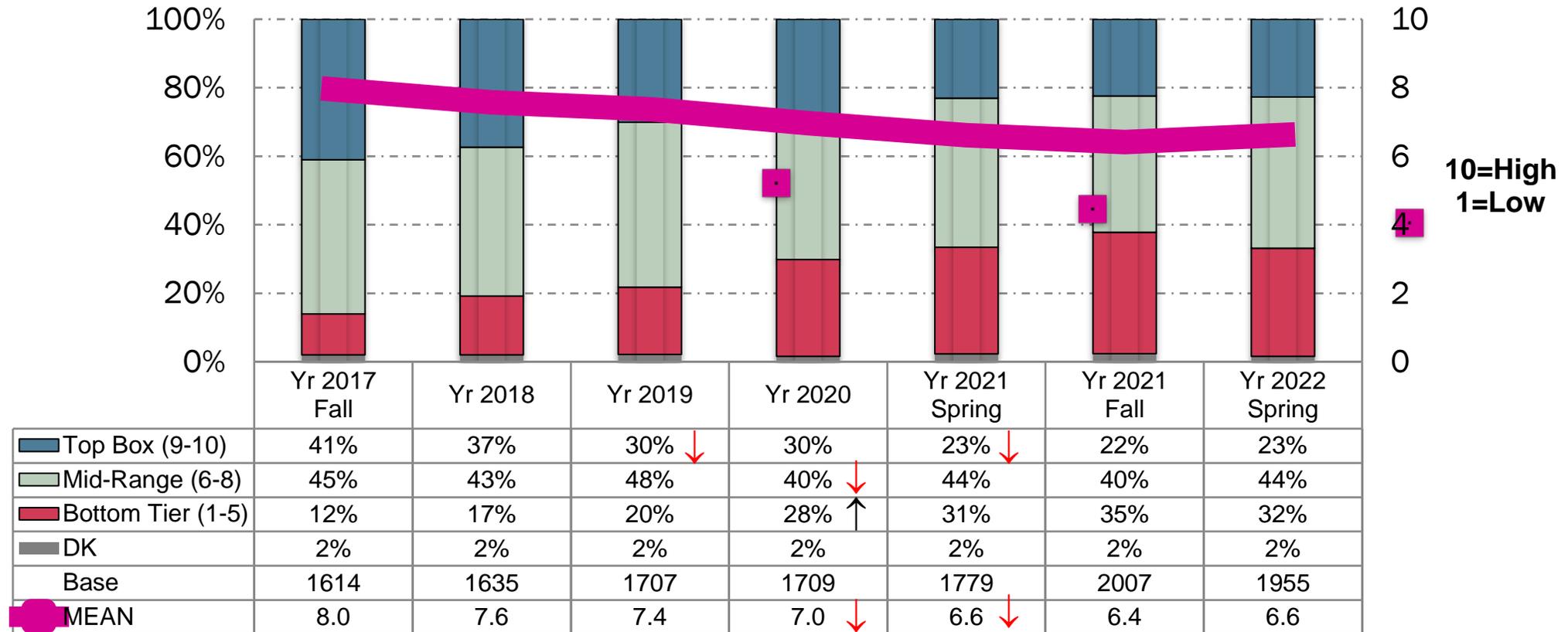


Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



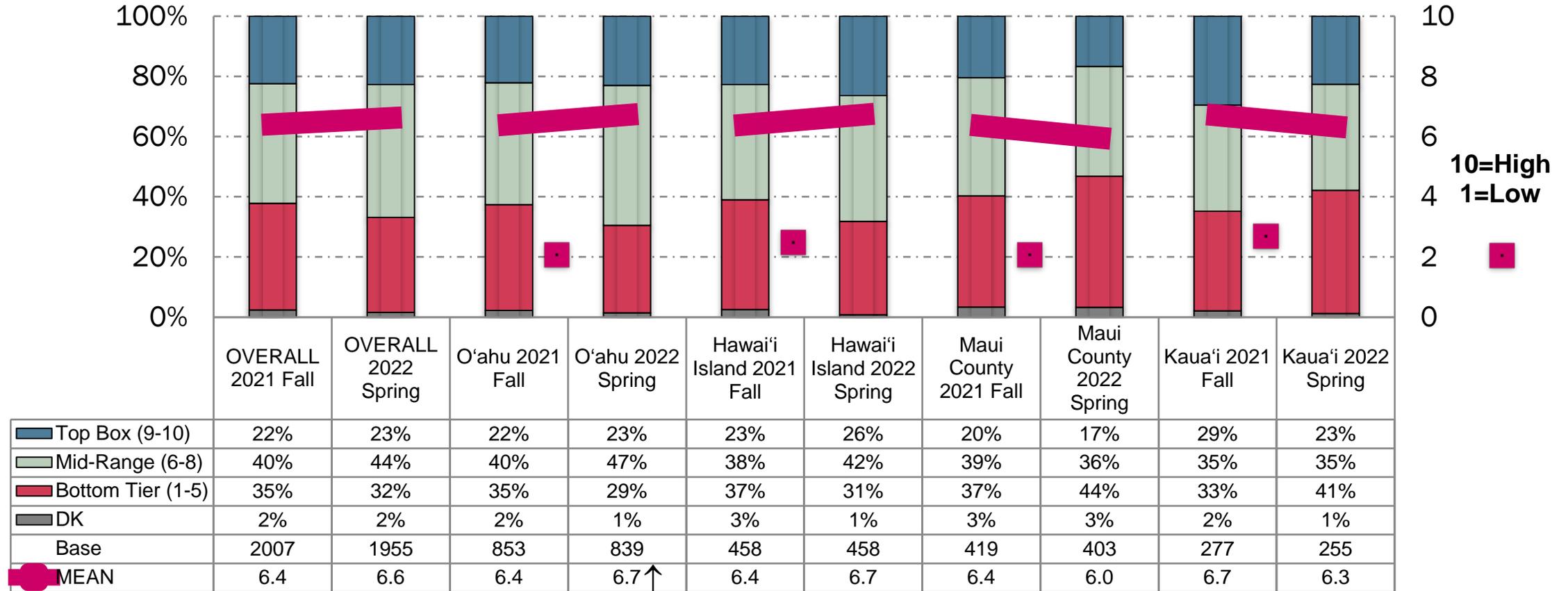
General Perceptions of the Visitor Industry

Perception of Tourism Industry in Hawai'i - *Overall*



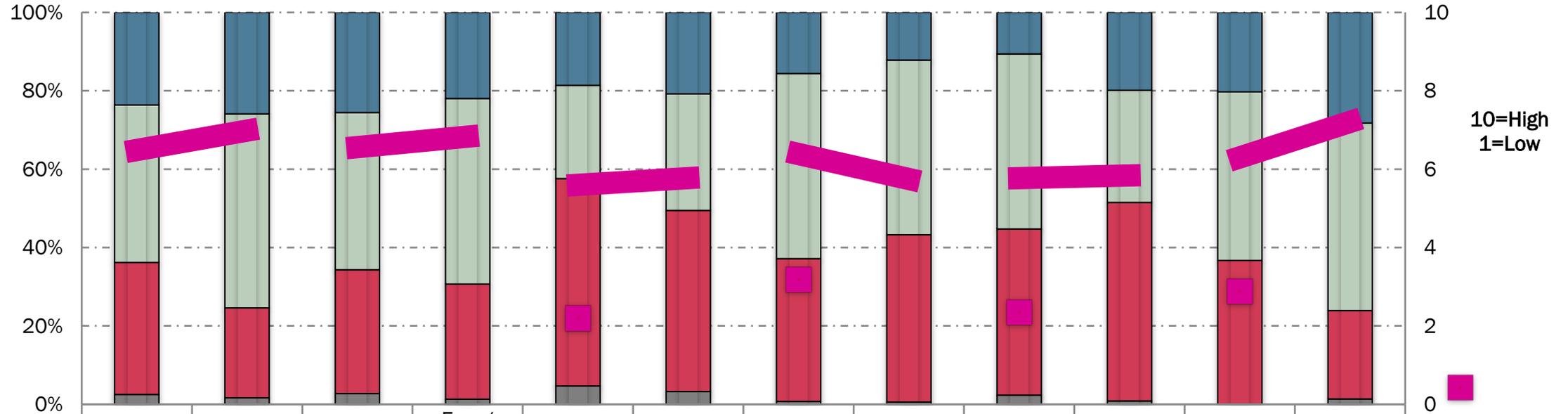
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



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

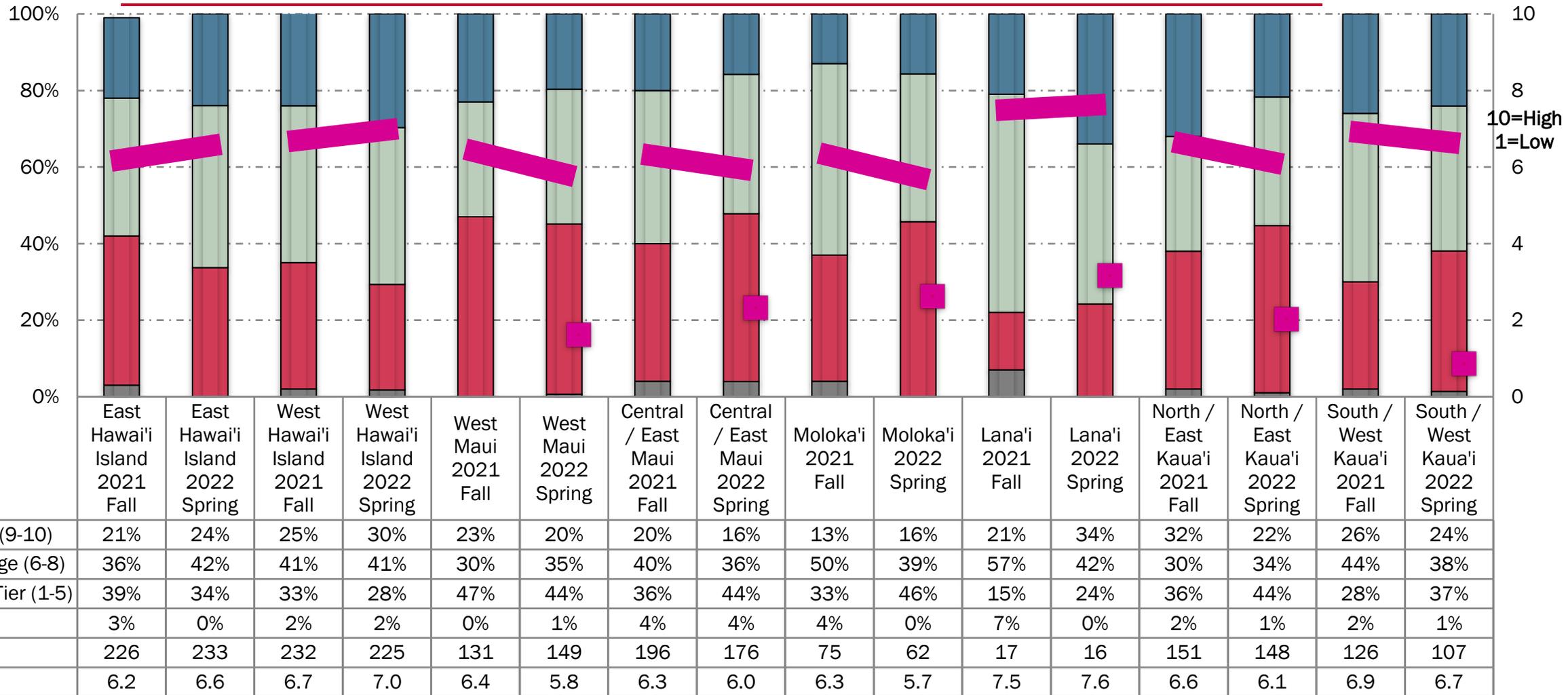
Perception of Tourism Industry in Hawai'i - *By Area (O'ahu)*



	Urban Honolulu 2021 Fall	Urban Honolulu 2022 Spring	Ewa / Leeward O'ahu 2021 Fall	Ewa / Leeward O'ahu 2022 Spring	Wai'anae 2021 Fall	Wai'anae 2022 Spring	Windward O'ahu 2021 Fall	Windward O'ahu 2022 Spring	North Shore 2021 Fall	North Shore 2022 Spring	Central O'ahu 2021 Fall	Central O'ahu 2022 Spring
Top Box (9-10)	24%	26%	26%	22%	19%	21%	16%	12%	11%	20%	20%	28%
Mid-Range (6-8)	40%	50% ↑	40%	47%	24%	30%	47%	45%	45%	29%	43%	48%
Bottom Tier (1-5)	34%	23%	32%	29%	53%	46%	36%	43%	42%	51%	37%	23%
DK/Rf	2%	2%	3%	1%	5%	3%	1%	1%	2%	1%	0%	1%
Base	309	308	170	154	76	80	128	131	84	80	86	86
MEAN	6.5	7.0 ↑	6.6	6.8	5.6	5.8	6.4	5.7	5.8	5.8	6.3	7.2 ↑

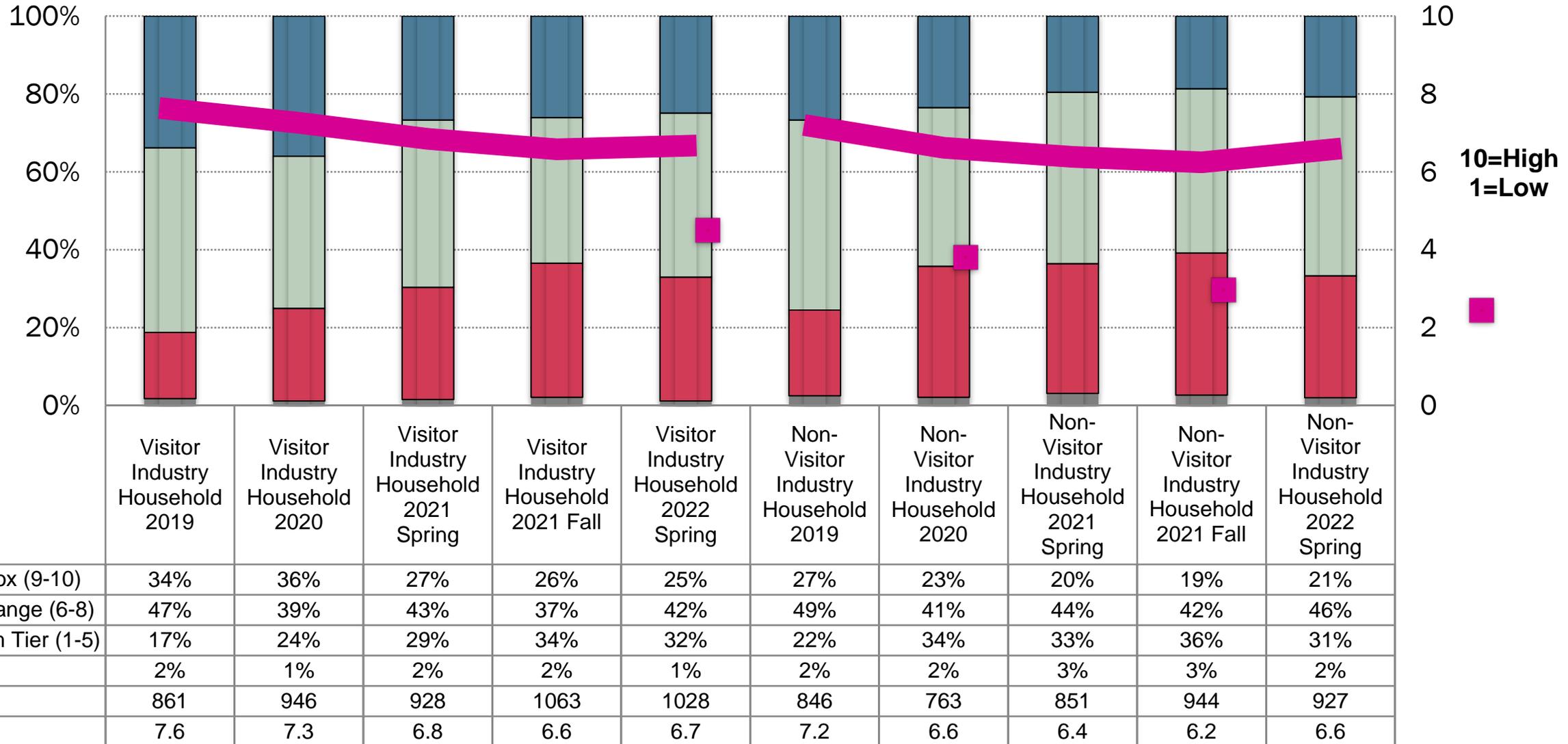
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

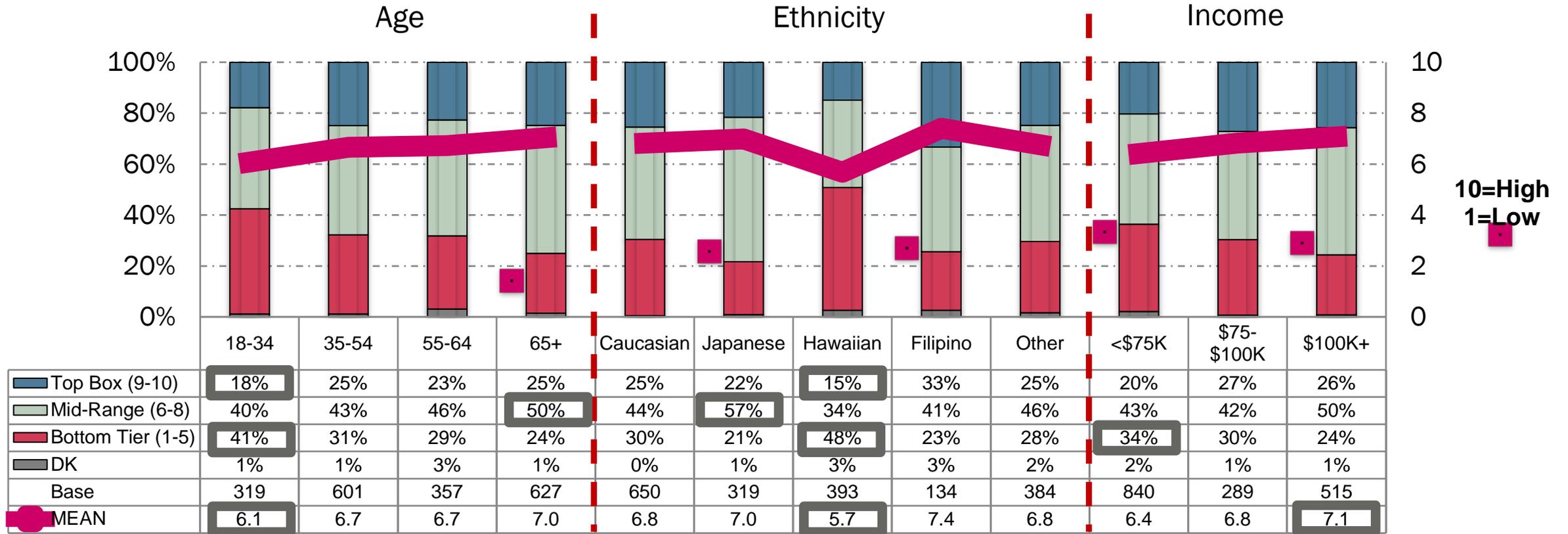
Perception of Tourism Industry in Hawai'i - *Visitor Industry Household vs Non-Visitor Industry Household*



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

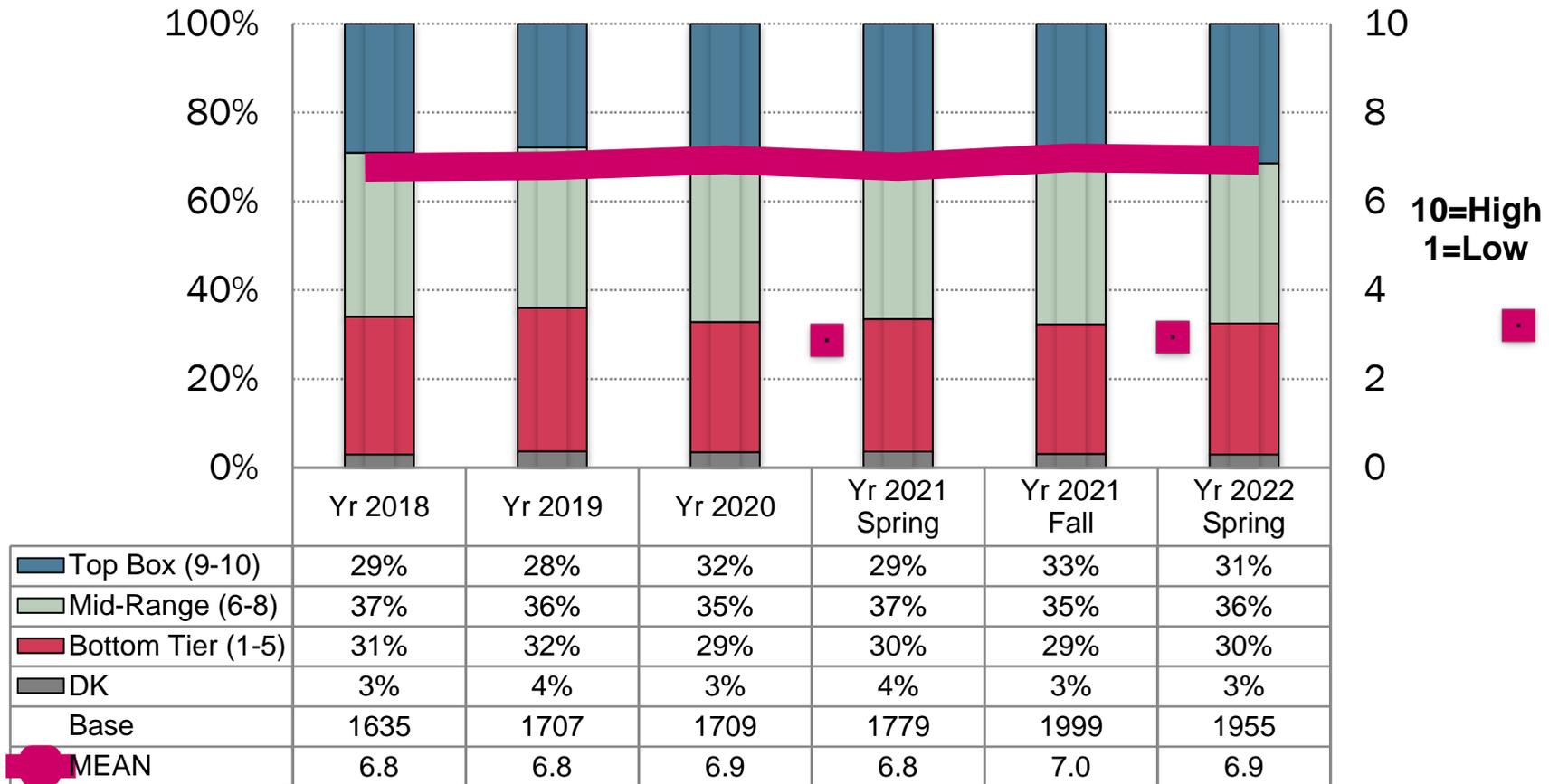
Perception of Tourism Industry in Hawai'i

- *By Demographics*



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

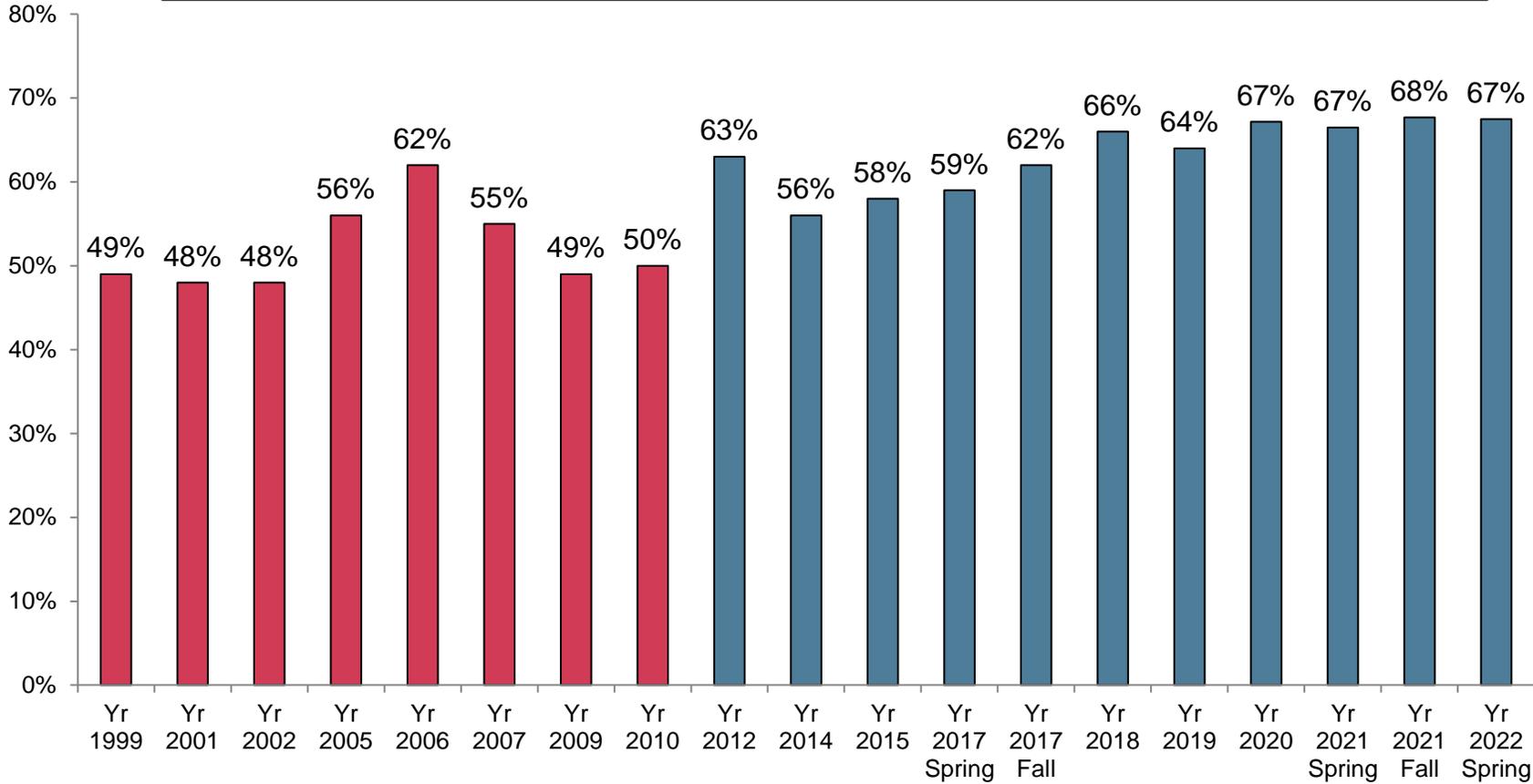
“This island is being run for tourists at the expense of local people” – *Overall*



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

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

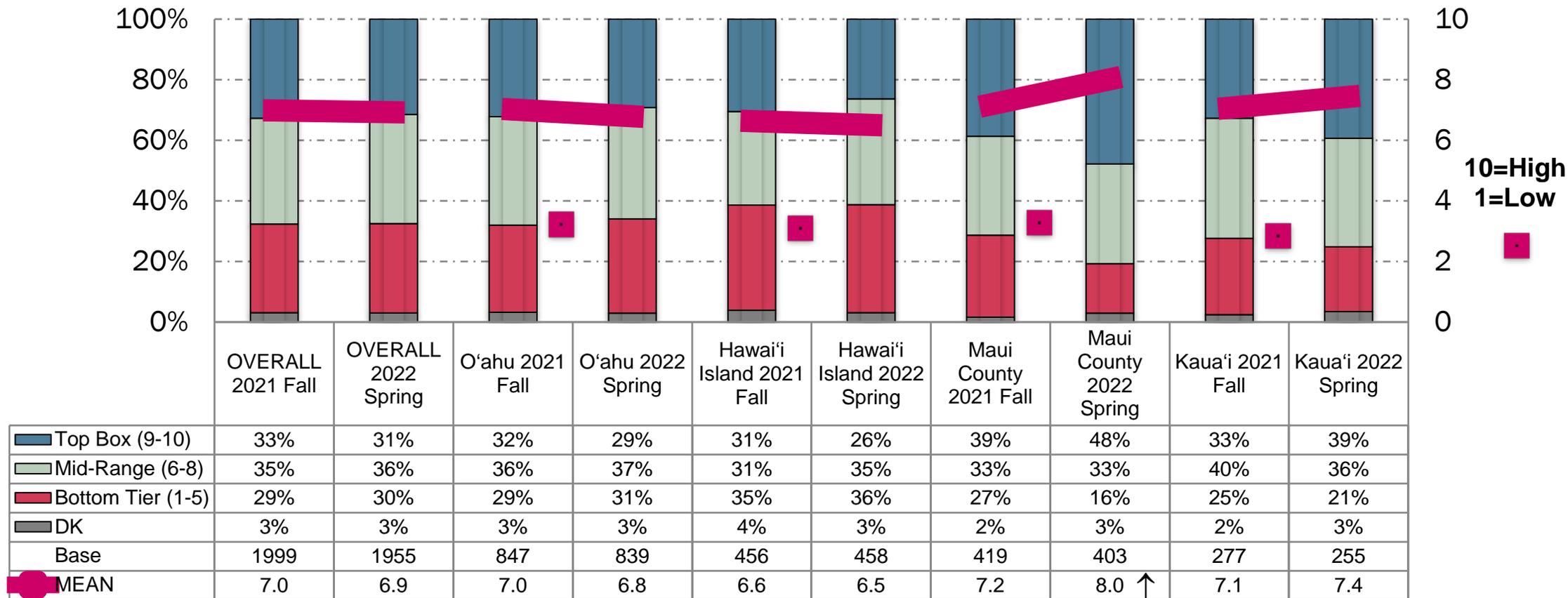
% strongly/ somewhat agree island is being run for tourists at expense of local people



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

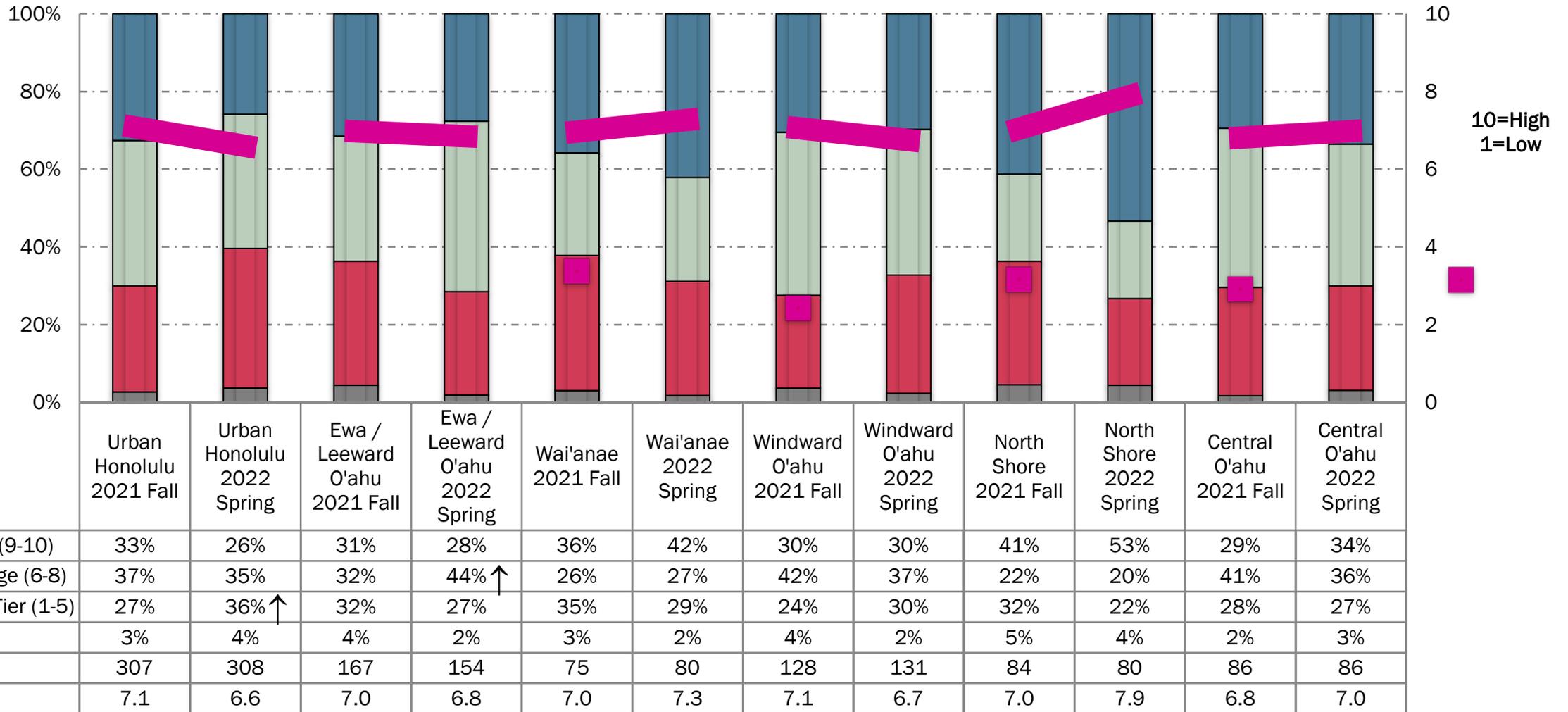
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



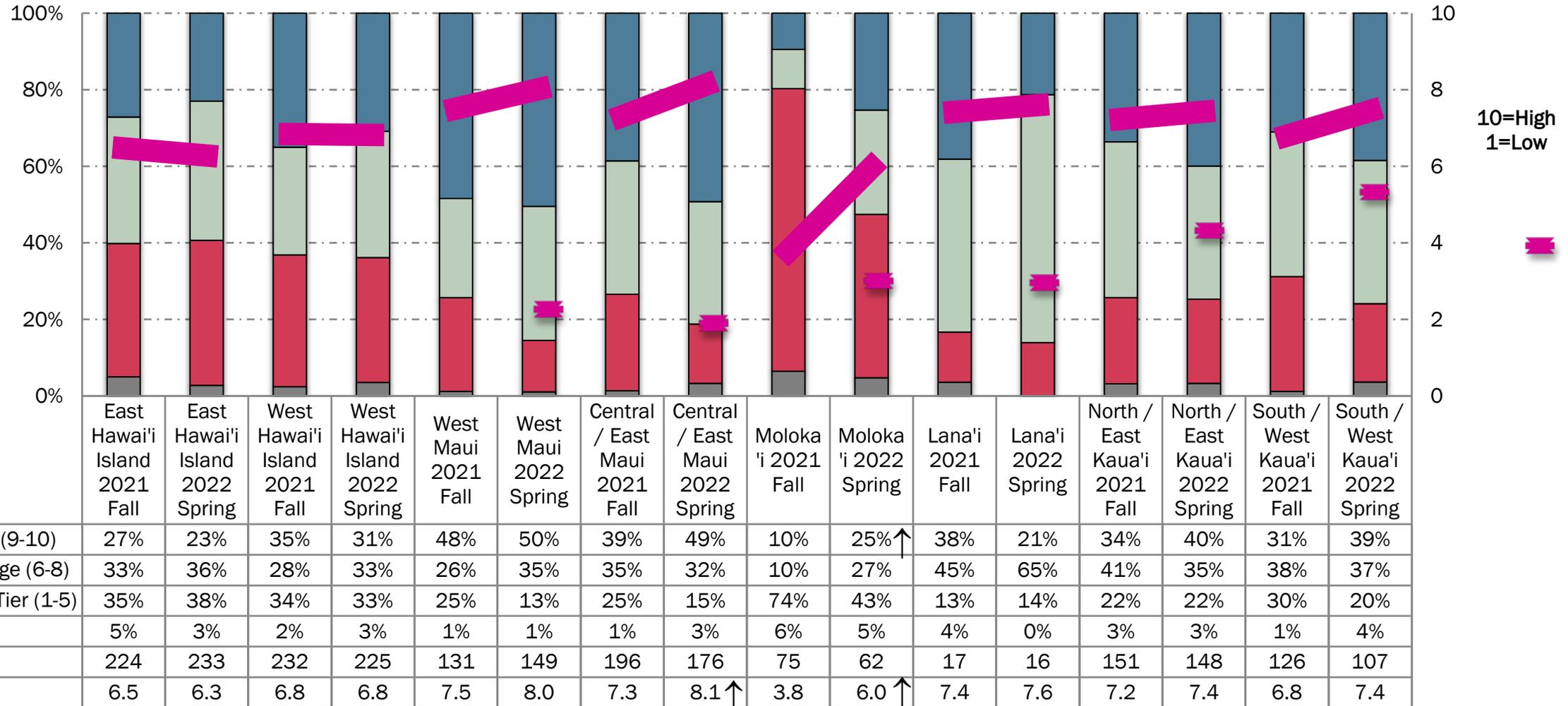
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” - *By Area (O’ahu)*



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

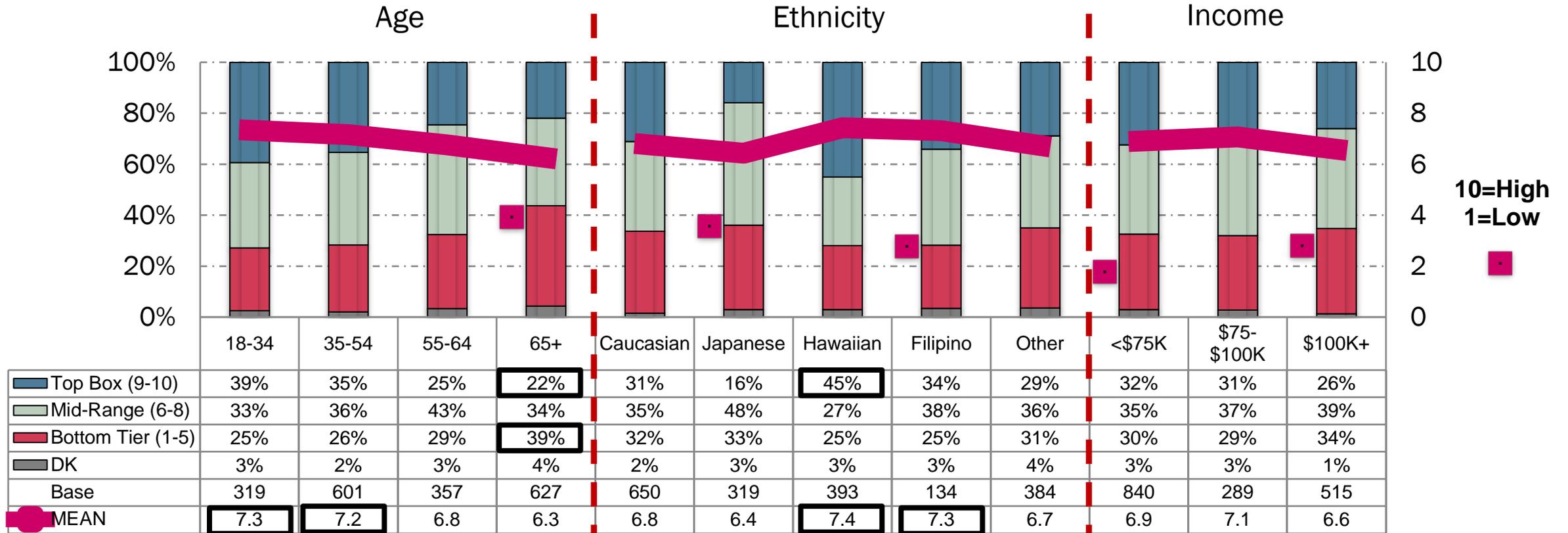
“This island is being run for tourists at the expense of local people” – By Area (Hawai'i Island, Maui, & Kaua'i)



Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

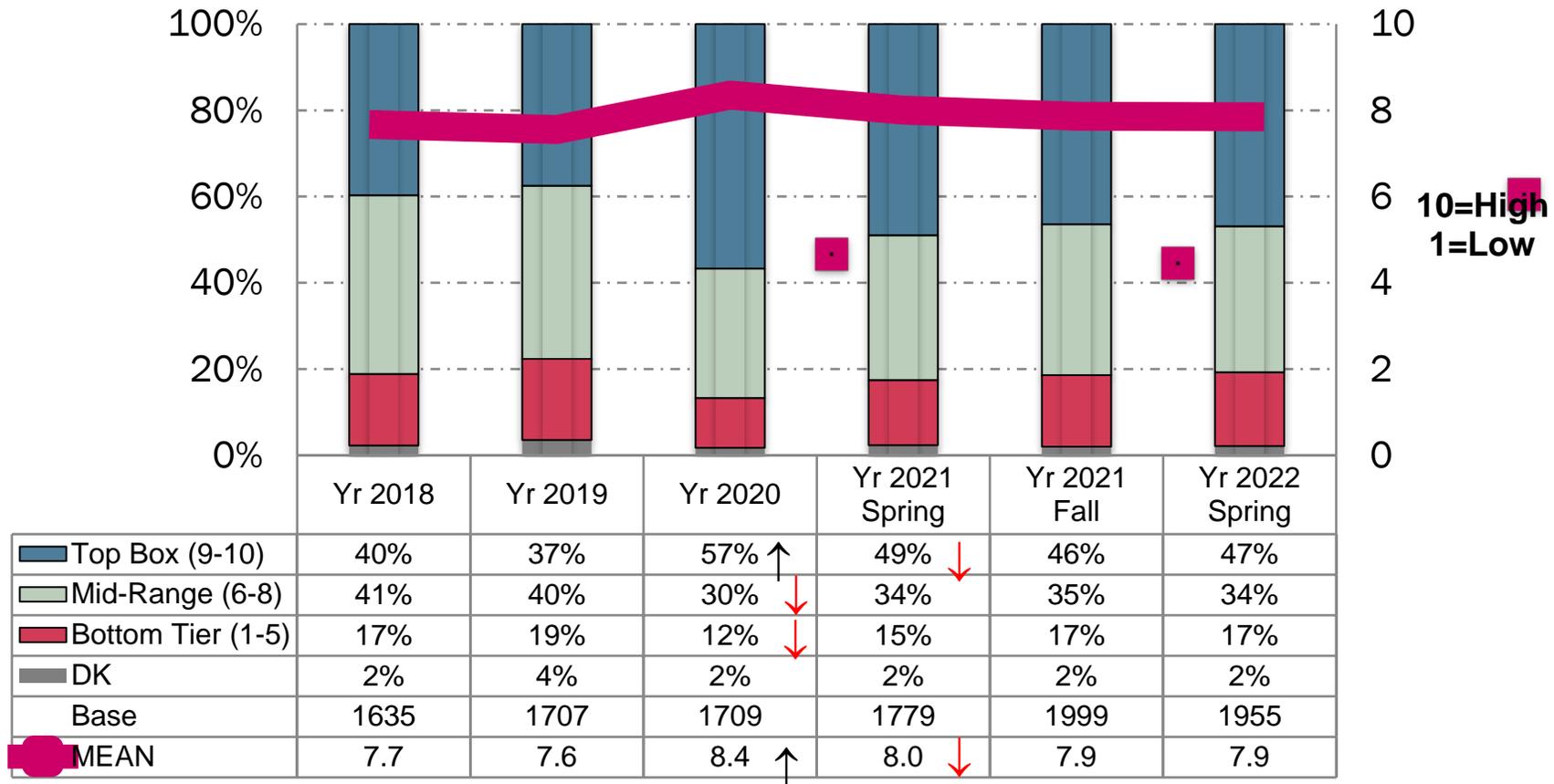
“This island is being run for tourists at the expense of local people”

– *By Demographics*



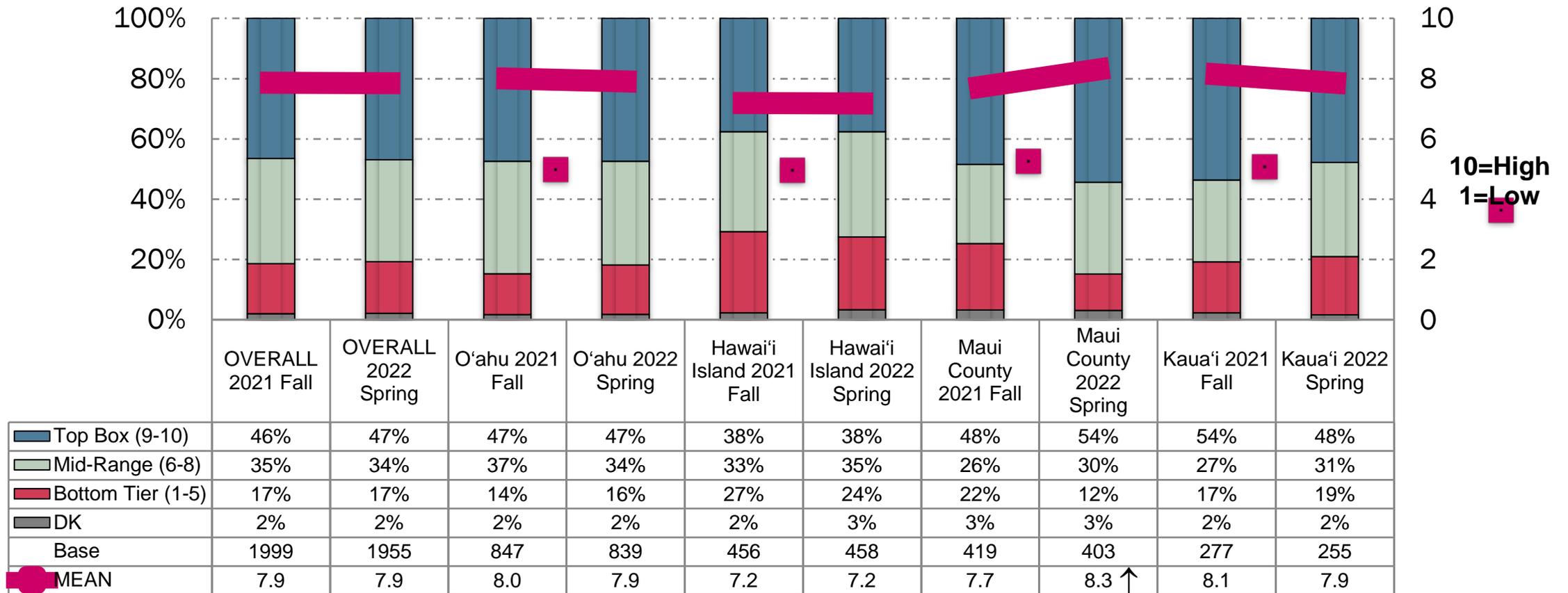
Q4.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



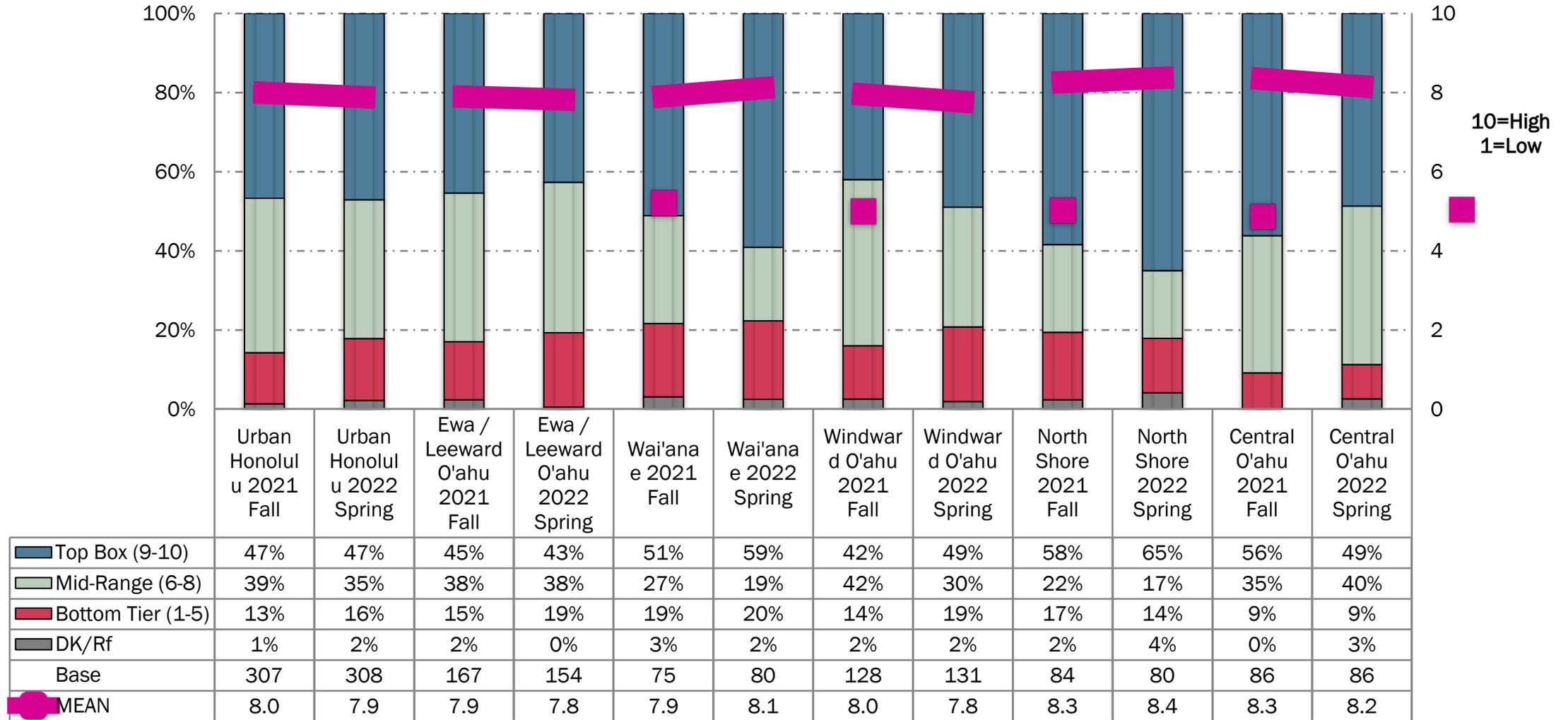
Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism” – *By Island*



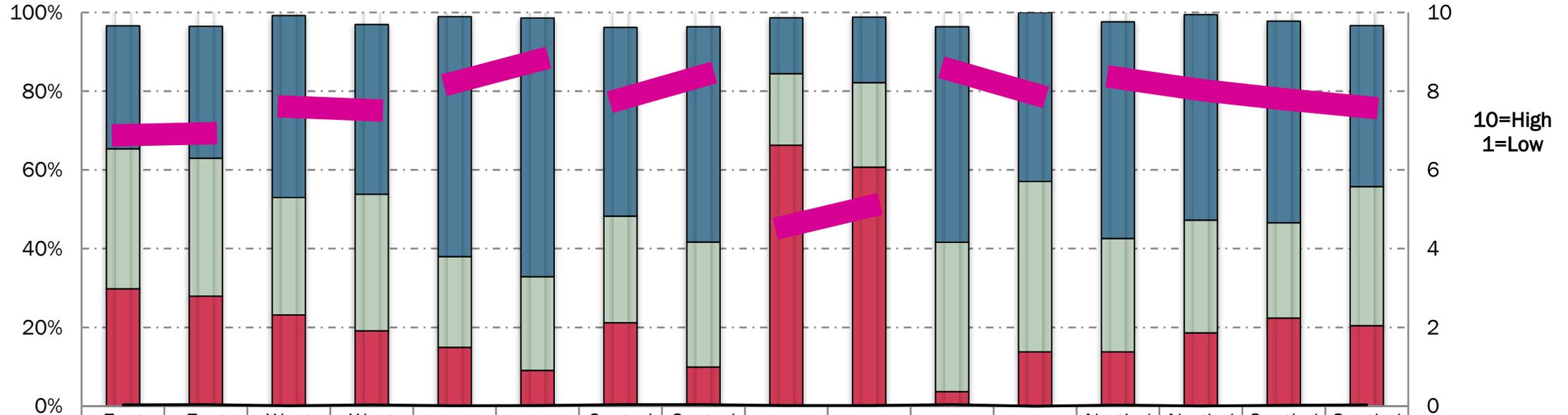
Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism” - *By Area* (O’ahu)



Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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

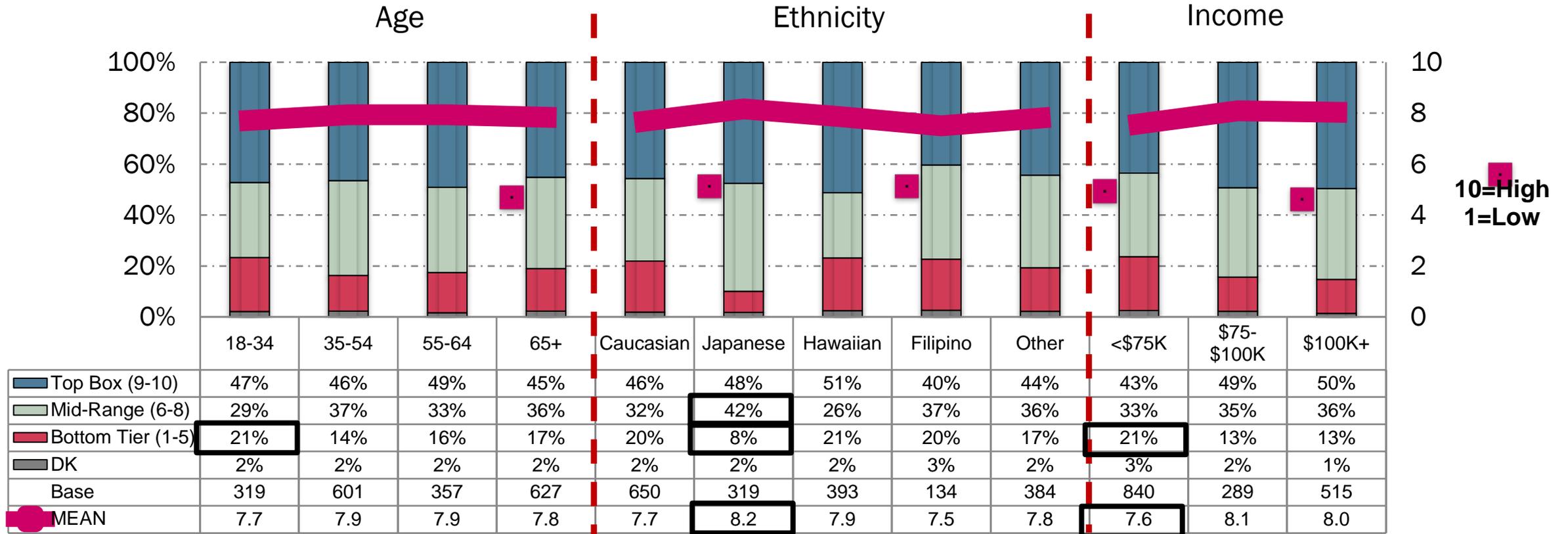


	East Hawai'i Island 2021 Fall	East Hawai'i Island 2022 Spring	West Hawai'i Island 2021 Fall	West Hawai'i Island 2022 Spring	West Maui 2021 Fall	West Maui 2022 Spring	Central / East Maui 2021 Fall	Central / East Maui 2022 Spring	Moloka 'i 2021 Fall	Moloka 'i 2022 Spring	Lana'i 2021 Fall	Lana'i 2022 Spring	North / East Kaua'i 2021 Fall	North / East Kaua'i 2022 Spring	South / West Kaua'i 2021 Fall	South / West Kaua'i 2022 Spring
Top Box (9-10)	31%	34%	46%	43%	61%	66%	48%	55%	14%	17%	55%	43%	55%	52%	51%	41%
Mid-Range (6-8)	36%	35%	30%	35%	23%	24%	27%	32%	18%	21%	38%	43%	29%	29%	24%	35%
Bottom Tier (1-5)	30%	28%	23%	19%	15%	9%	21%	10%	66%	61%	4%	14%	14%	19%	22%	20%
Base	226	233	232	225	131	149	196	176	75	62	17	16	151	148	126	107
DK/Rf	3%	4%	1%	3%	1%	1%	4%	4%	1%	1%	4%	0%	2%	1%	2%	3%
MEAN	6.9	6.9	7.6	7.5	8.2	8.8	7.8	8.4	4.6	5.1	8.5	7.9	8.3	8.0	7.8	7.6

Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua'i was broken into two areas due to larger sample sizes.

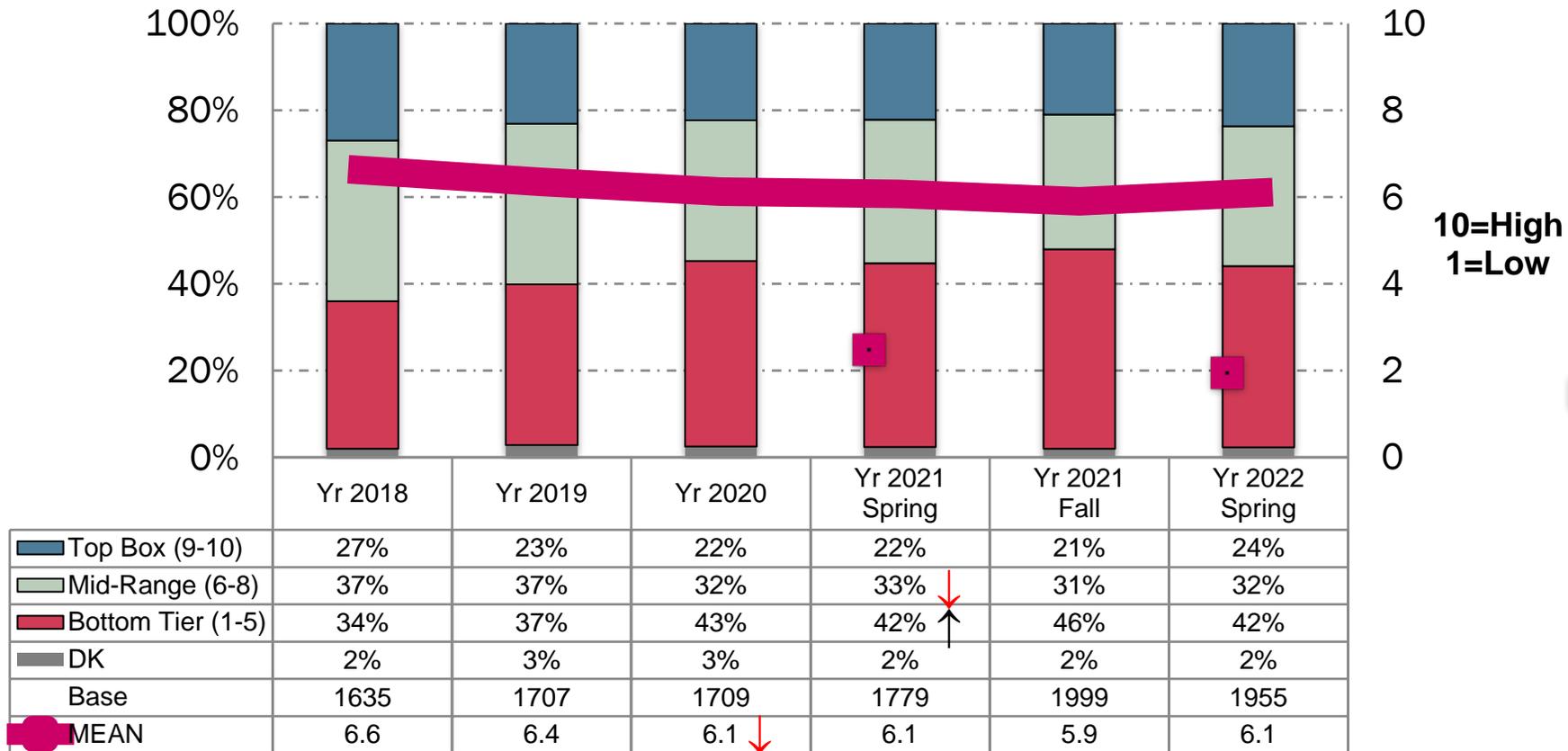
“My Island’s economy is too dependent on tourism”

– *By Demographics*



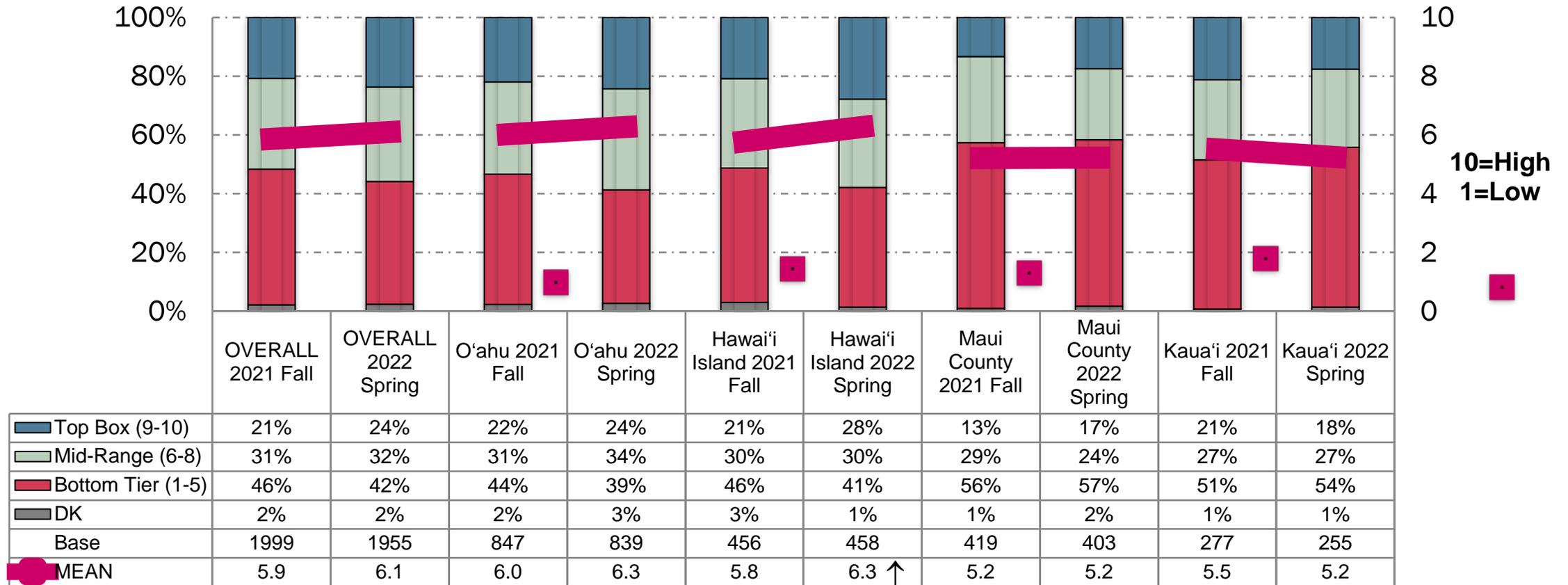
Q4.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism 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 Island*



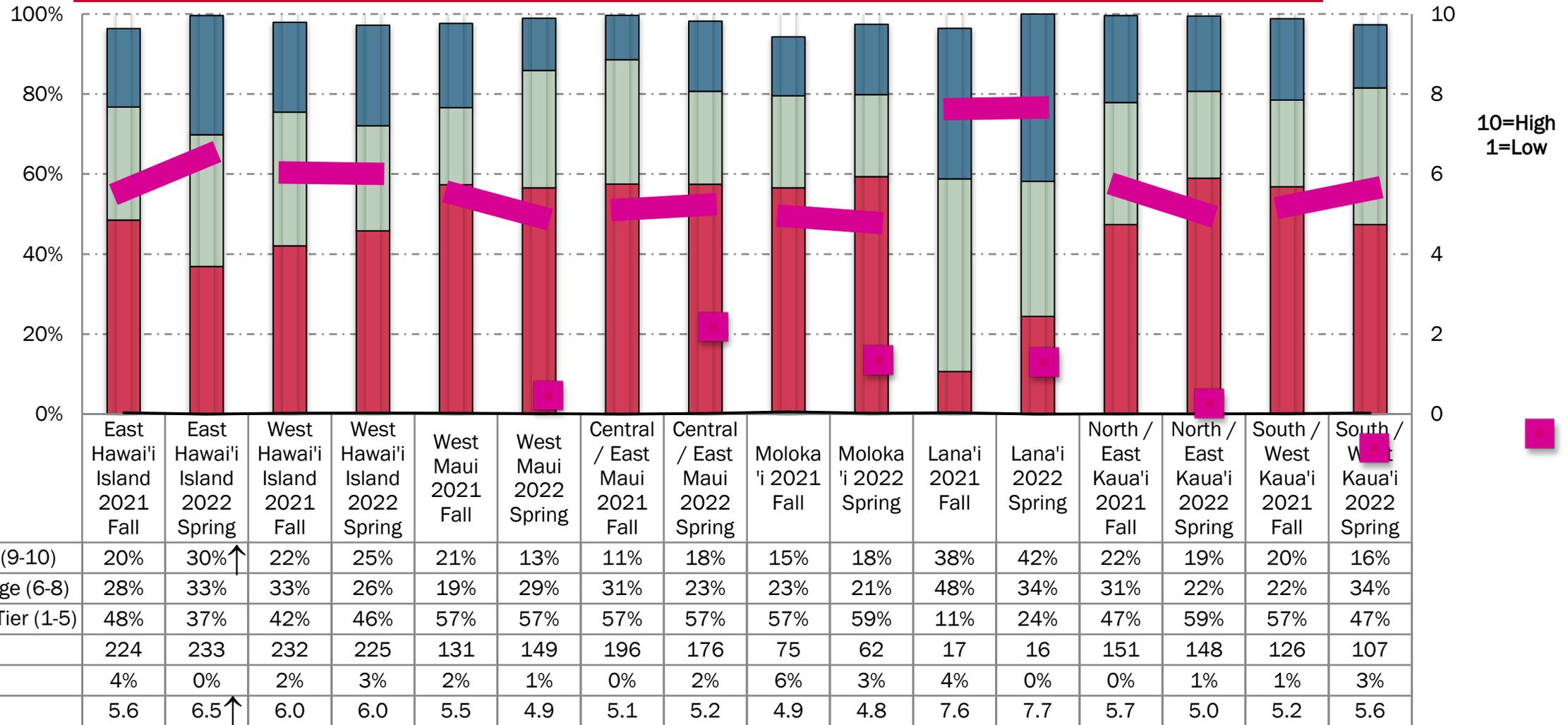
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism should be actively encouraged on my island” – By Area (O’ahu)



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...?

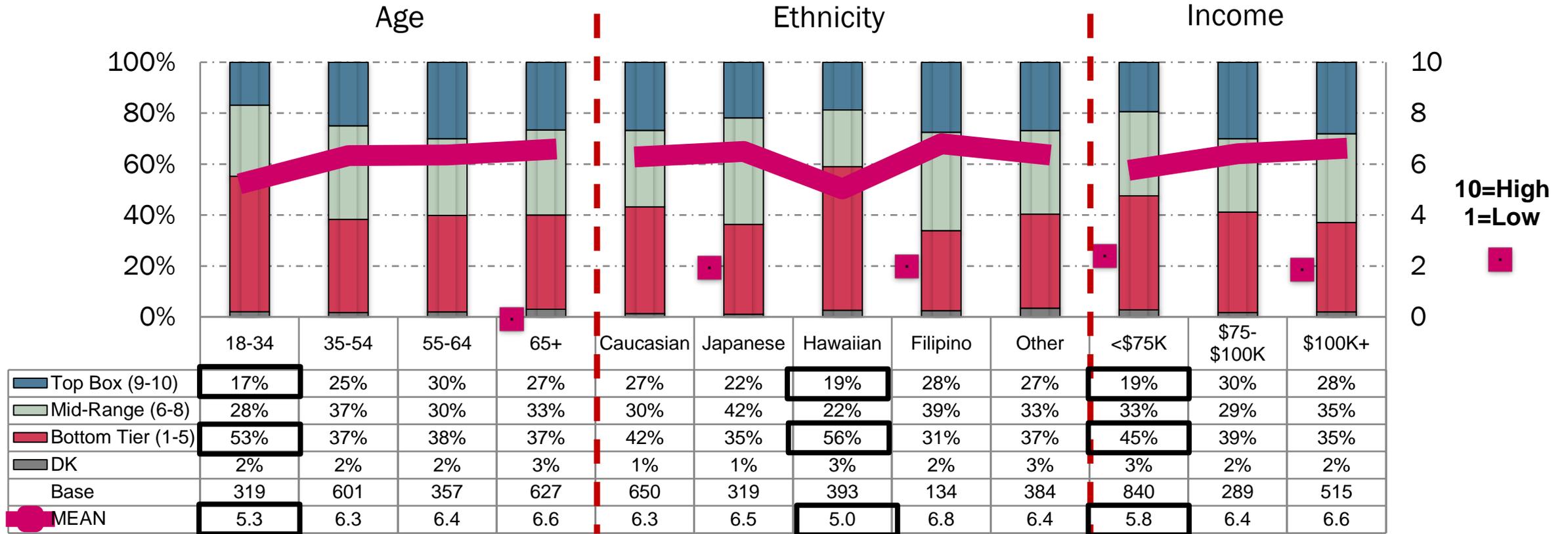
“Tourism should be actively encouraged on my island” – *By Area* (Hawai‘i Island, Maui, & Kaua‘i)



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

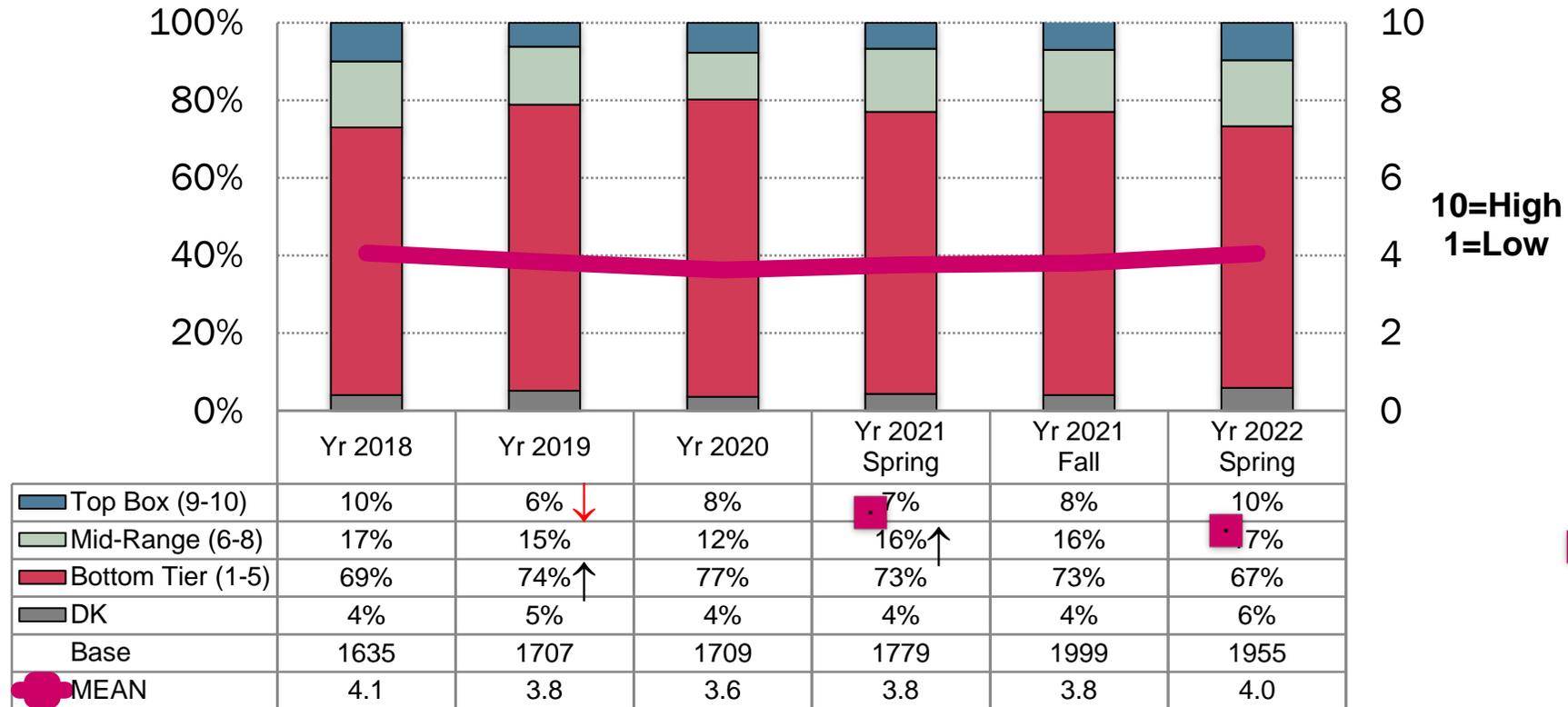
“Tourism should be actively encouraged on my island”

– *By Demographics*



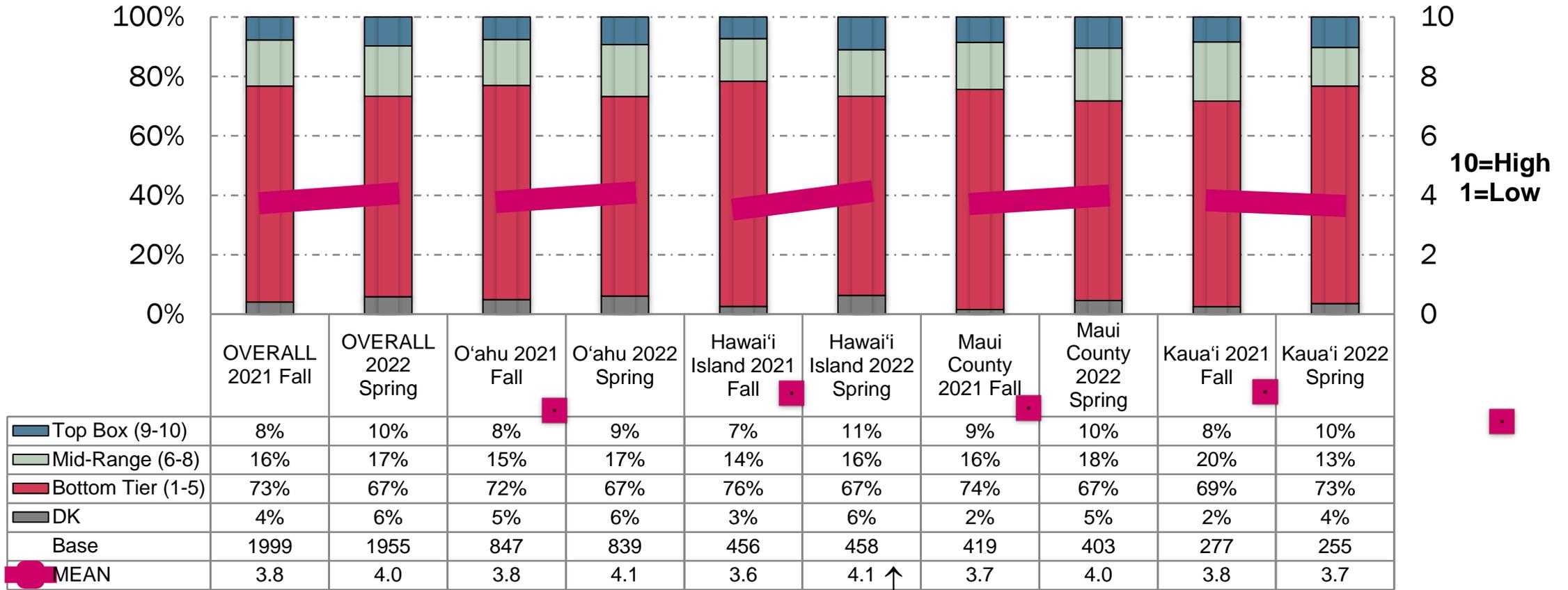
Q4.8. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



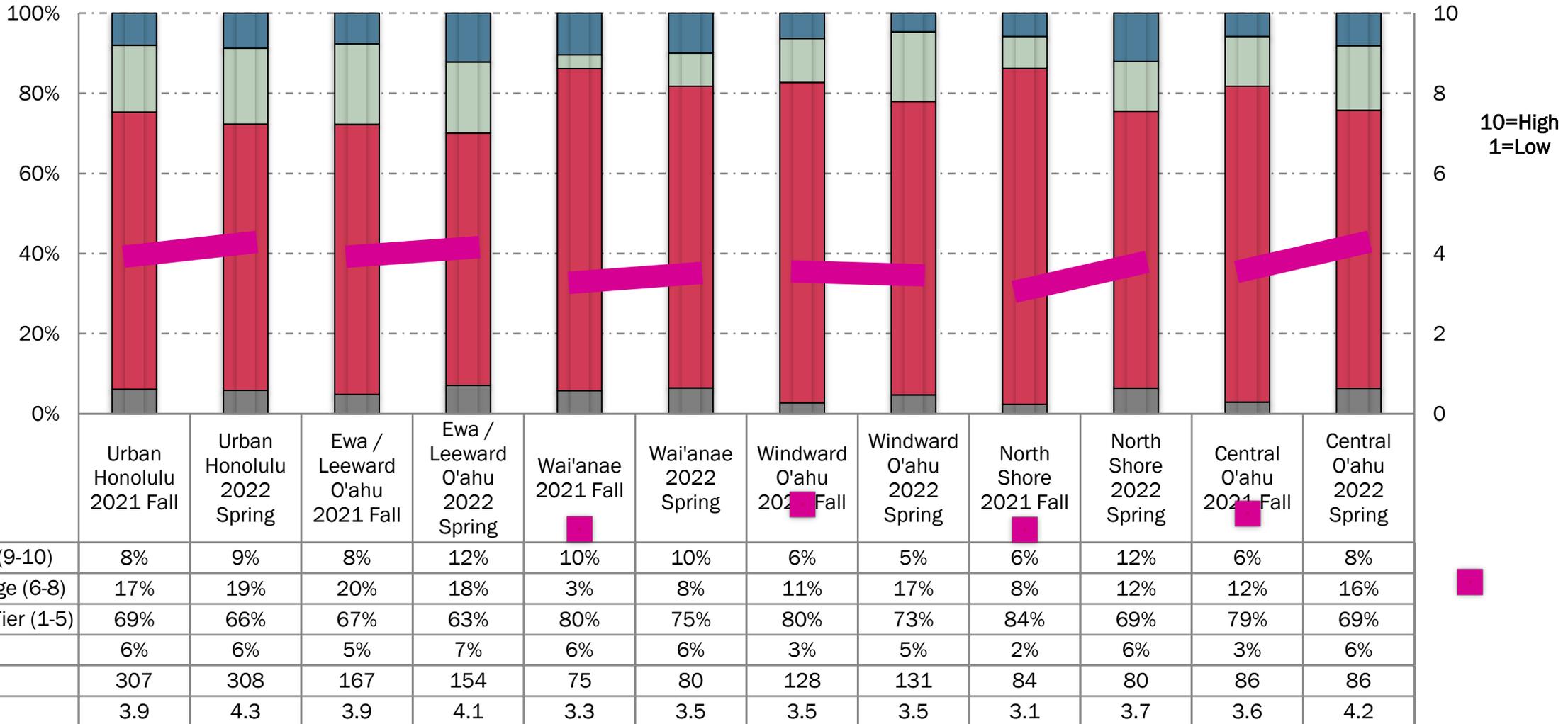
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



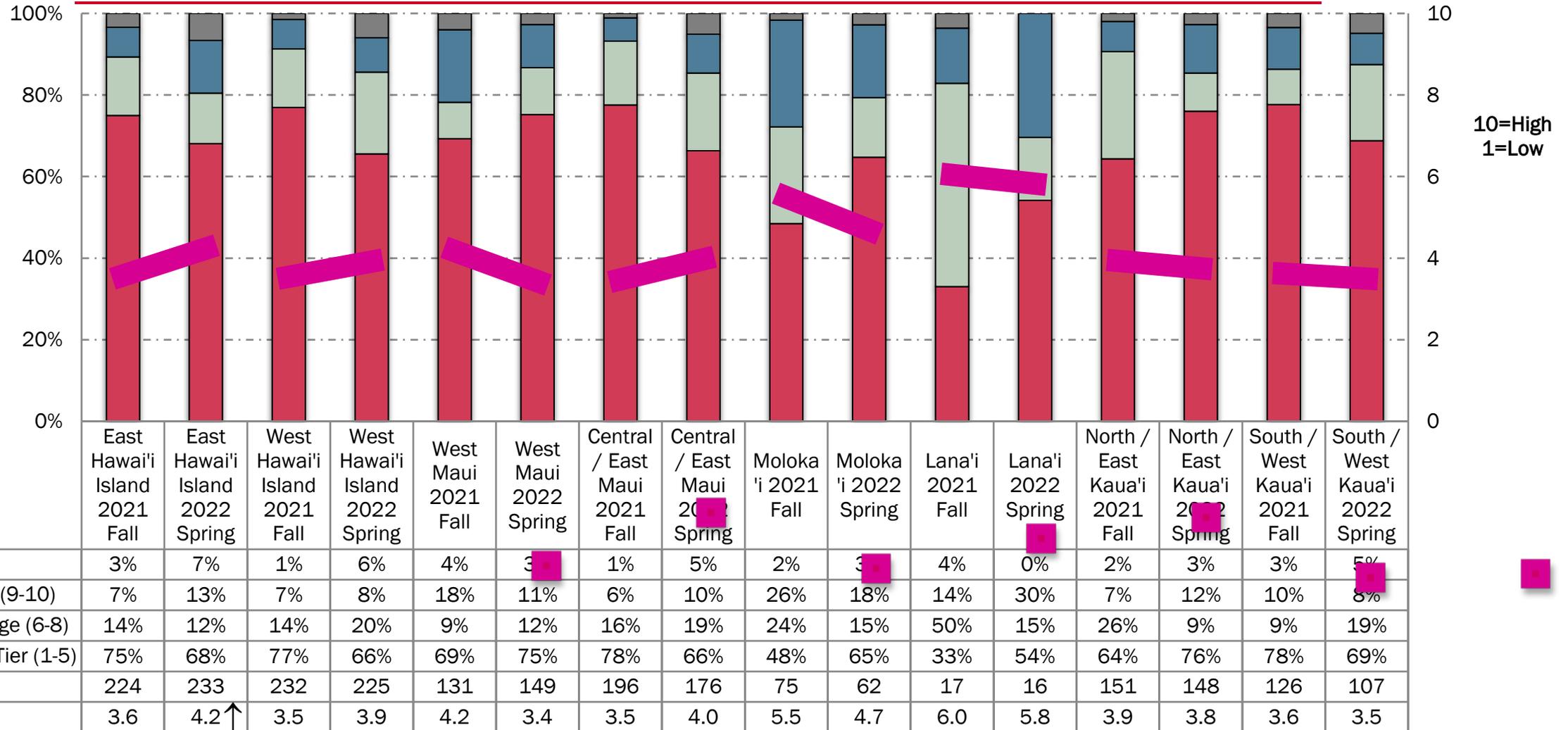
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” – *By Area (O’ahu)*



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...?

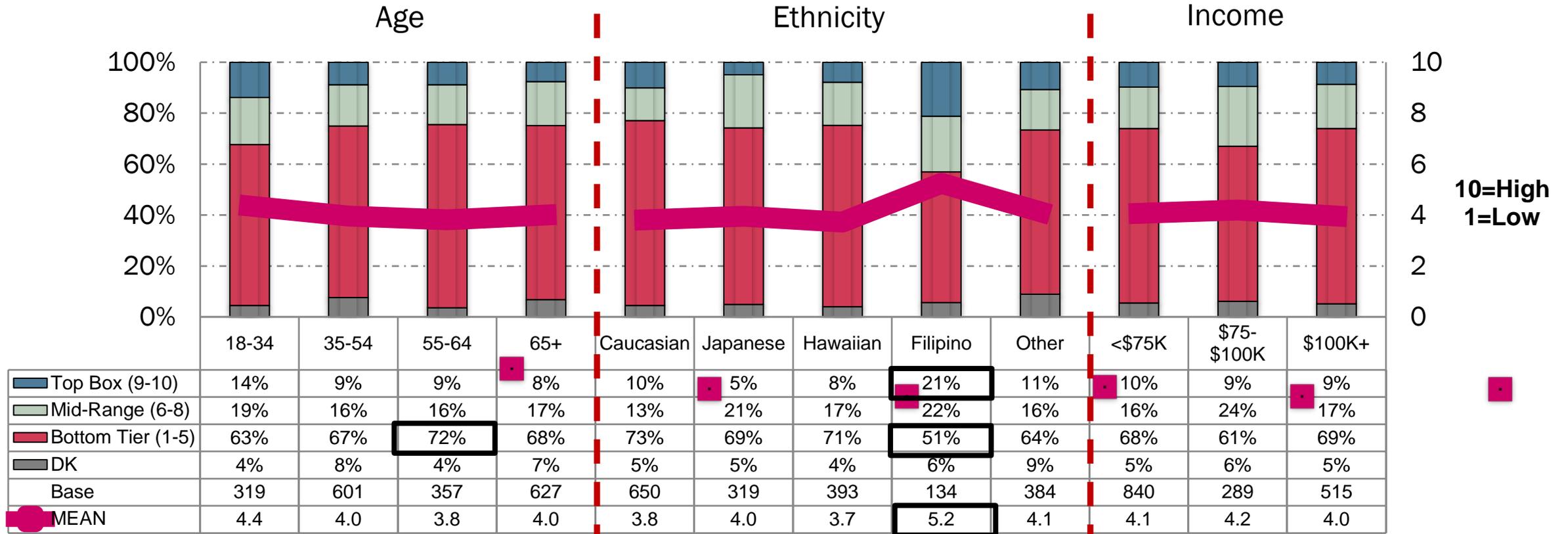
“I feel like I have a voice in my island’s tourism development decisions” – *By Area (Hawai’i Island, Maui, & Kaua’i)*



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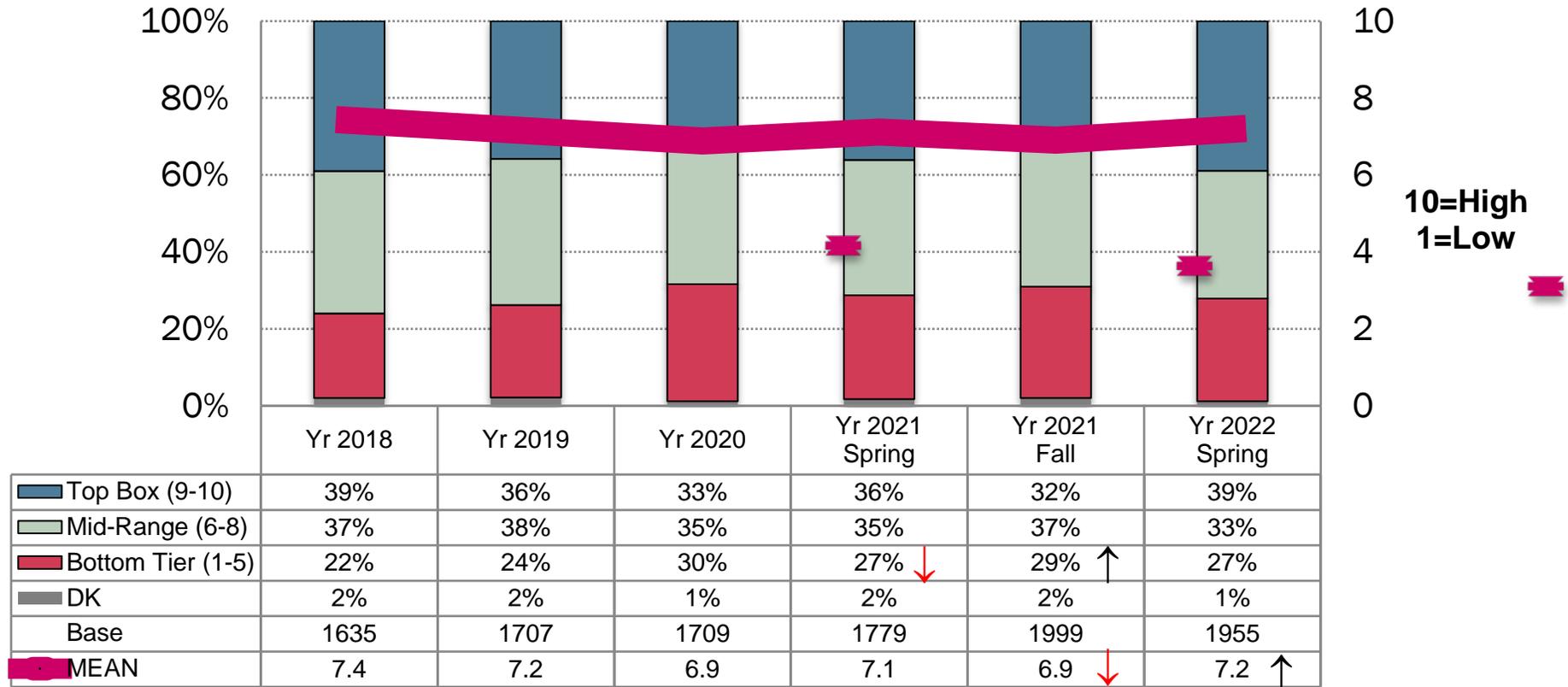
“I feel like I have a voice in my island’s tourism development decisions”

– *By Demographics*



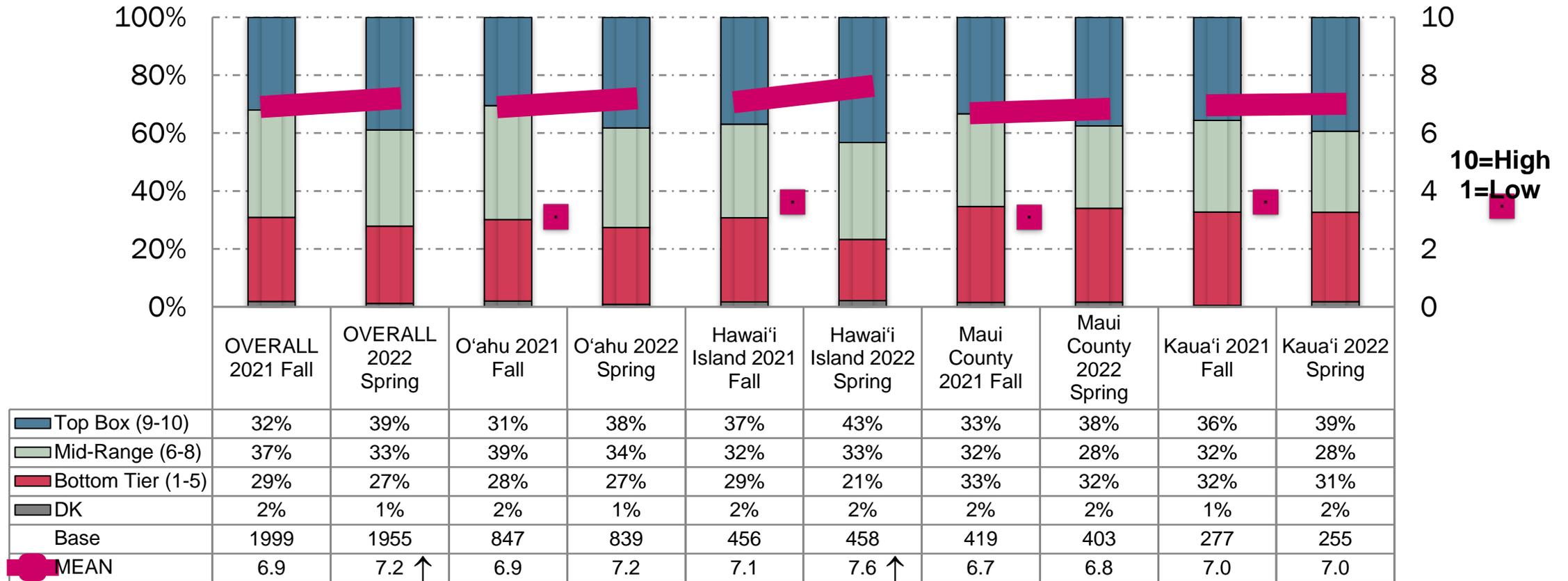
Q4.11. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism in Hawai‘i reminds me that we have a unique culture to share with visitors” - *Overall*



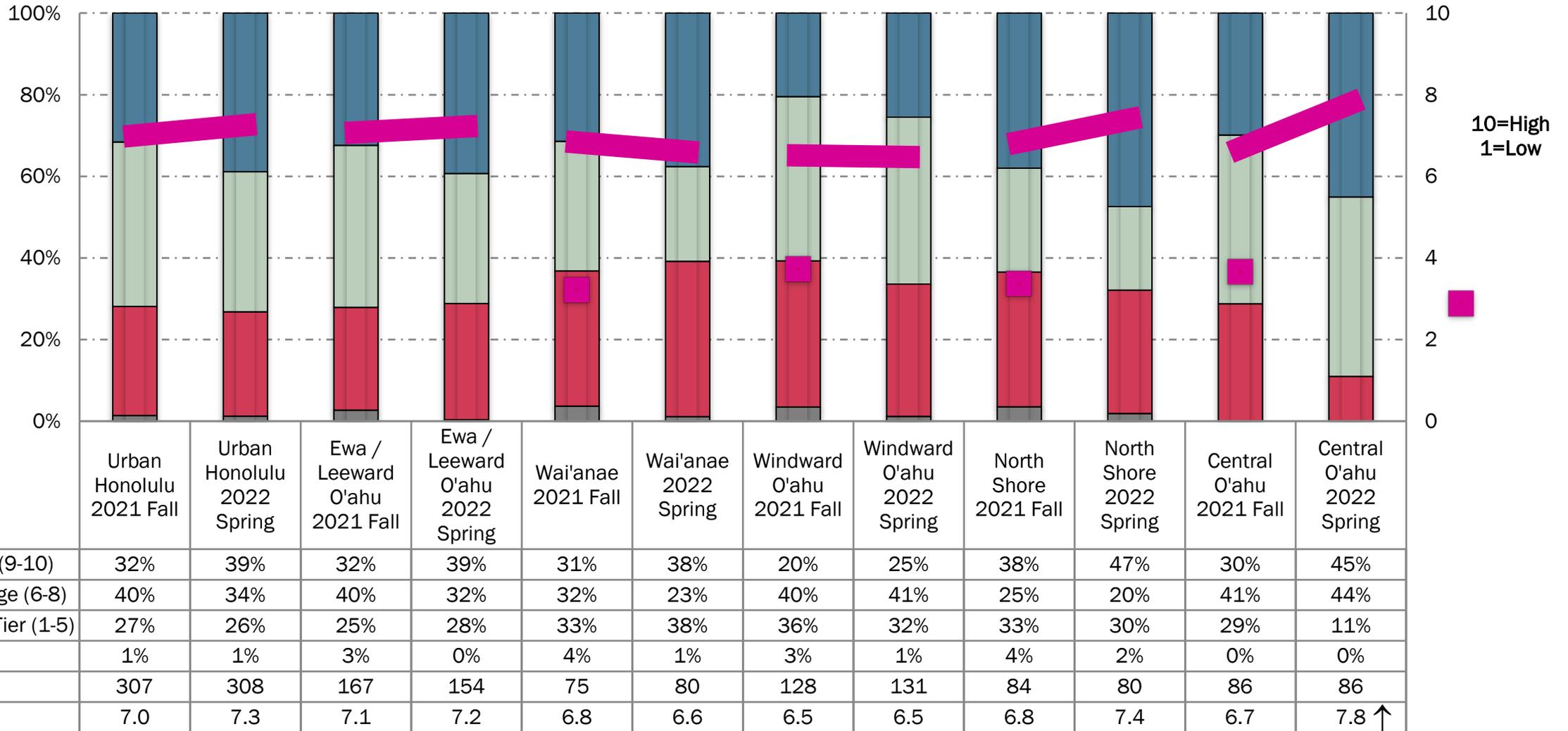
Q4.12: Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism in Hawai‘i reminds me that we have a unique culture to share with visitors” – *By Island*



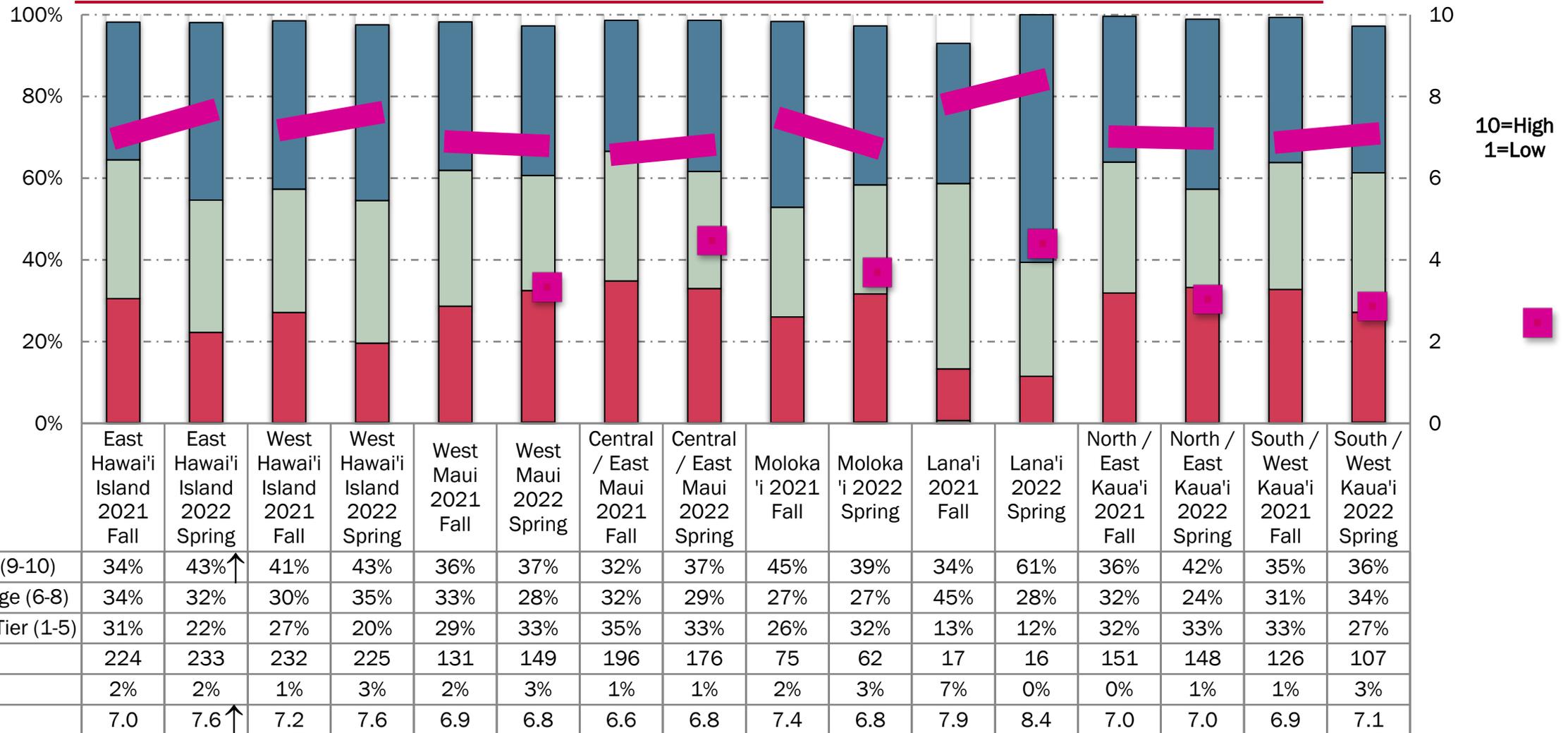
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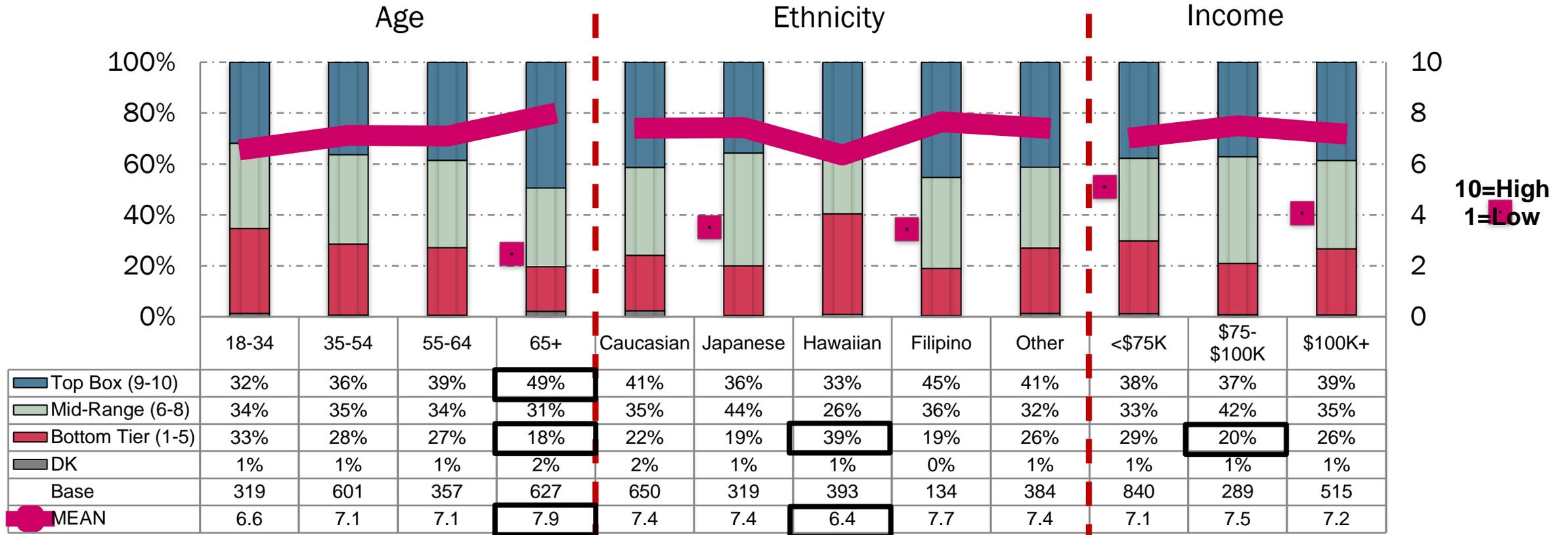
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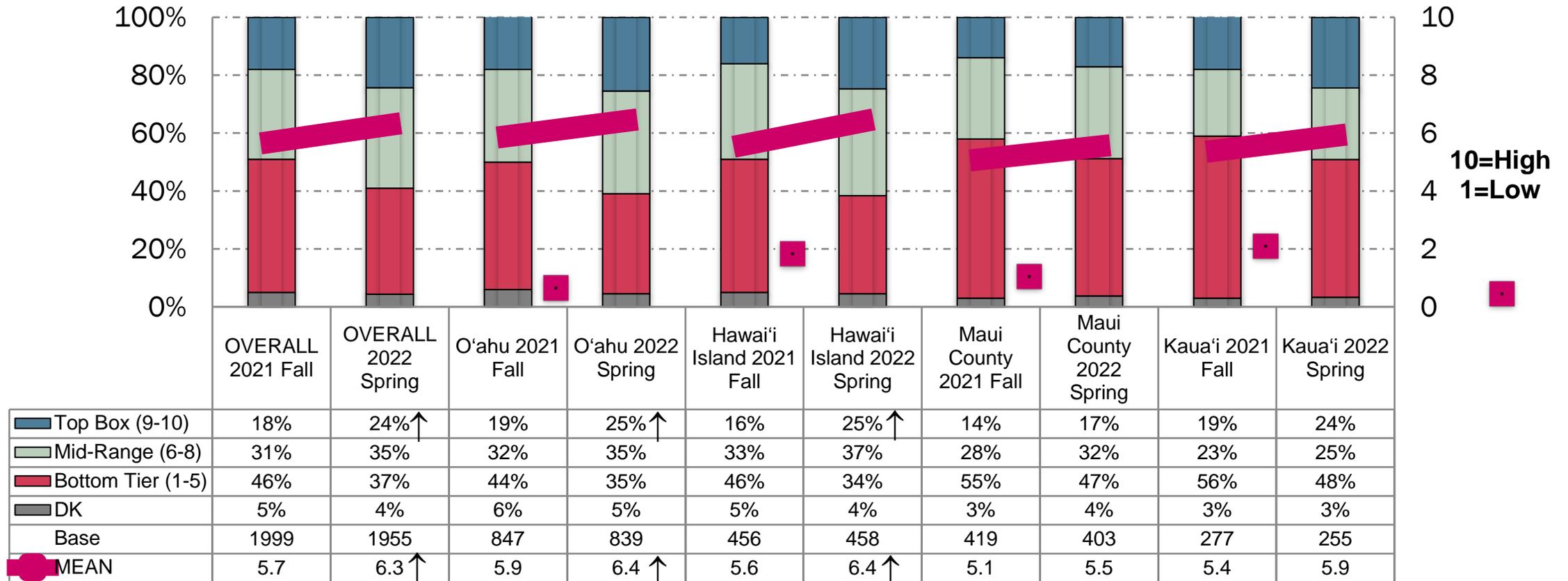
Q4.12. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...? Note: 2021 was the first year Kaua‘i was broken into two areas due to larger sample sizes.

“Tourism in Hawai‘i reminds me that we have a unique culture to share with visitors” – *By Demographics*



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

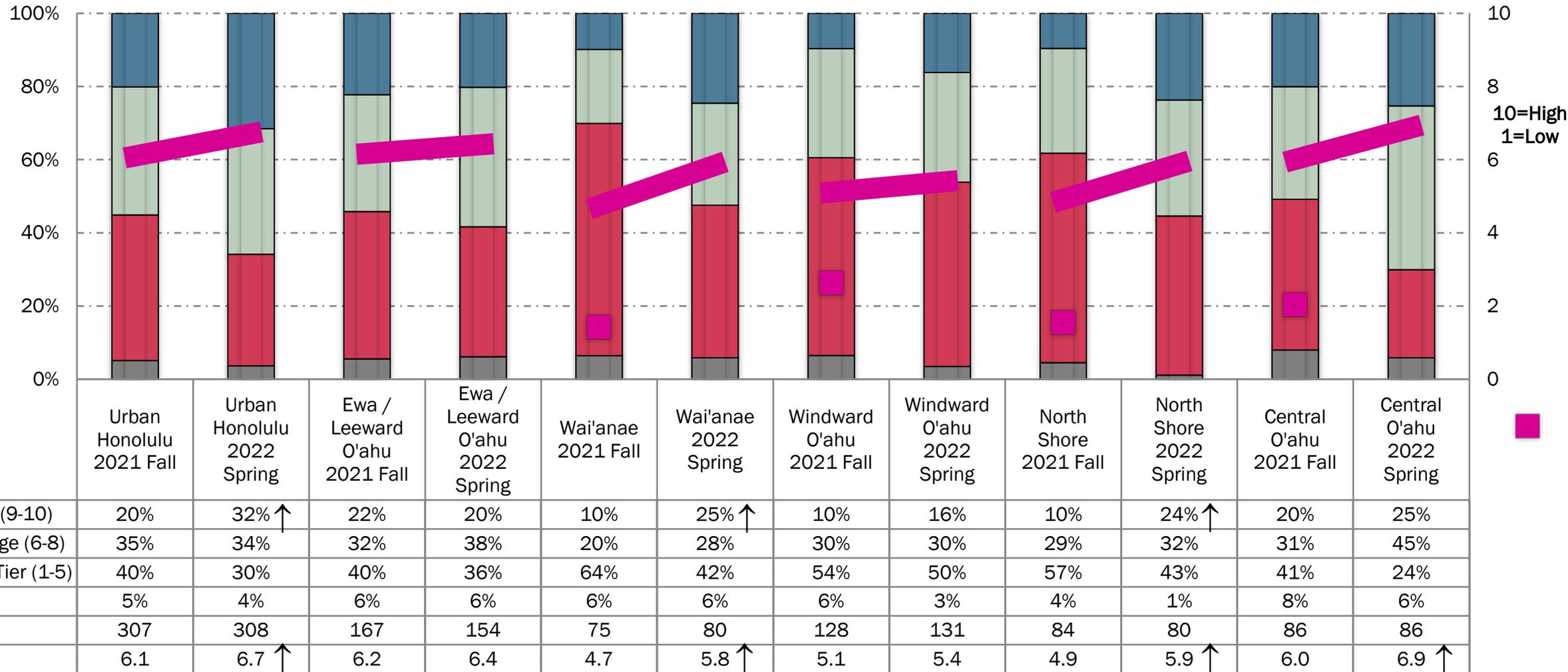
“Tourism supports other industries important to residents like agriculture”* – *By Island*



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

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

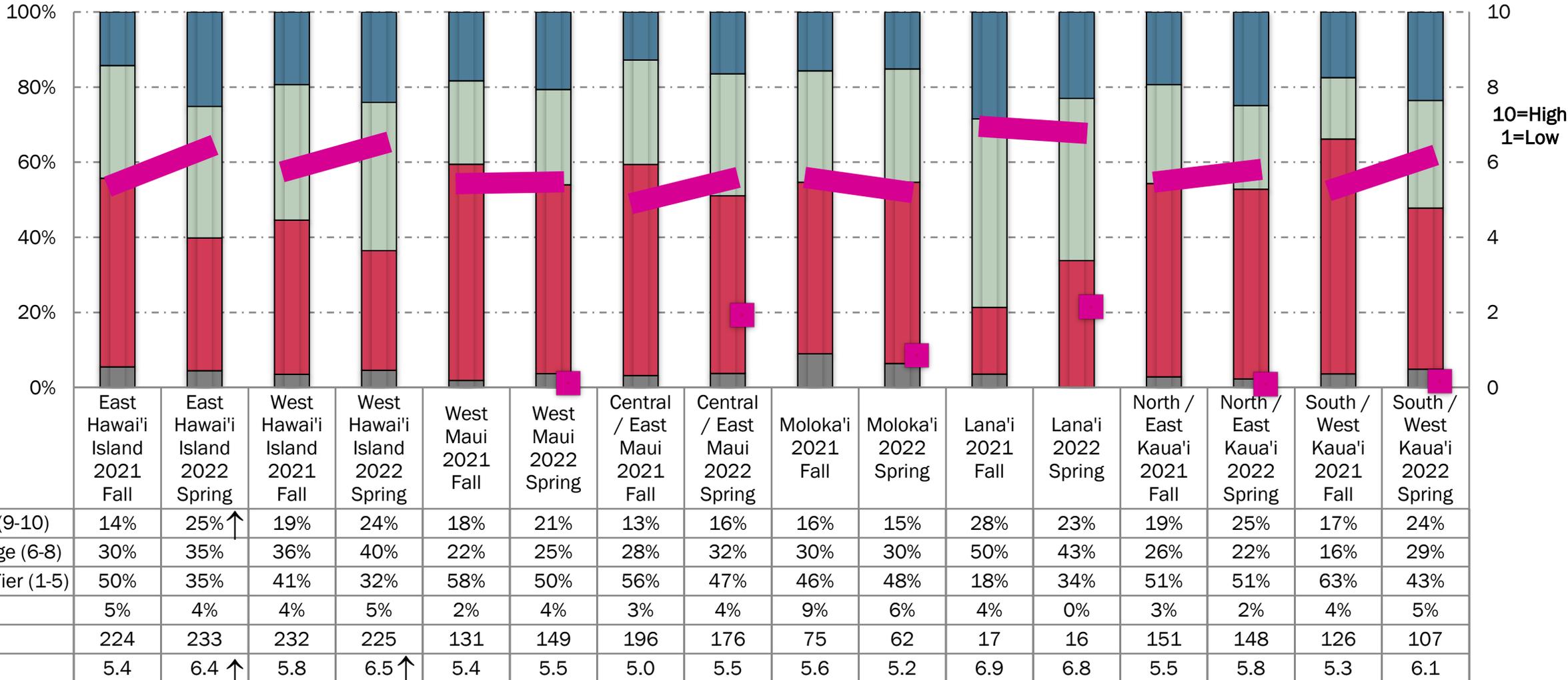
“Tourism supports other industries important to residents like agriculture”* - *By Area (O’ahu)*



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.

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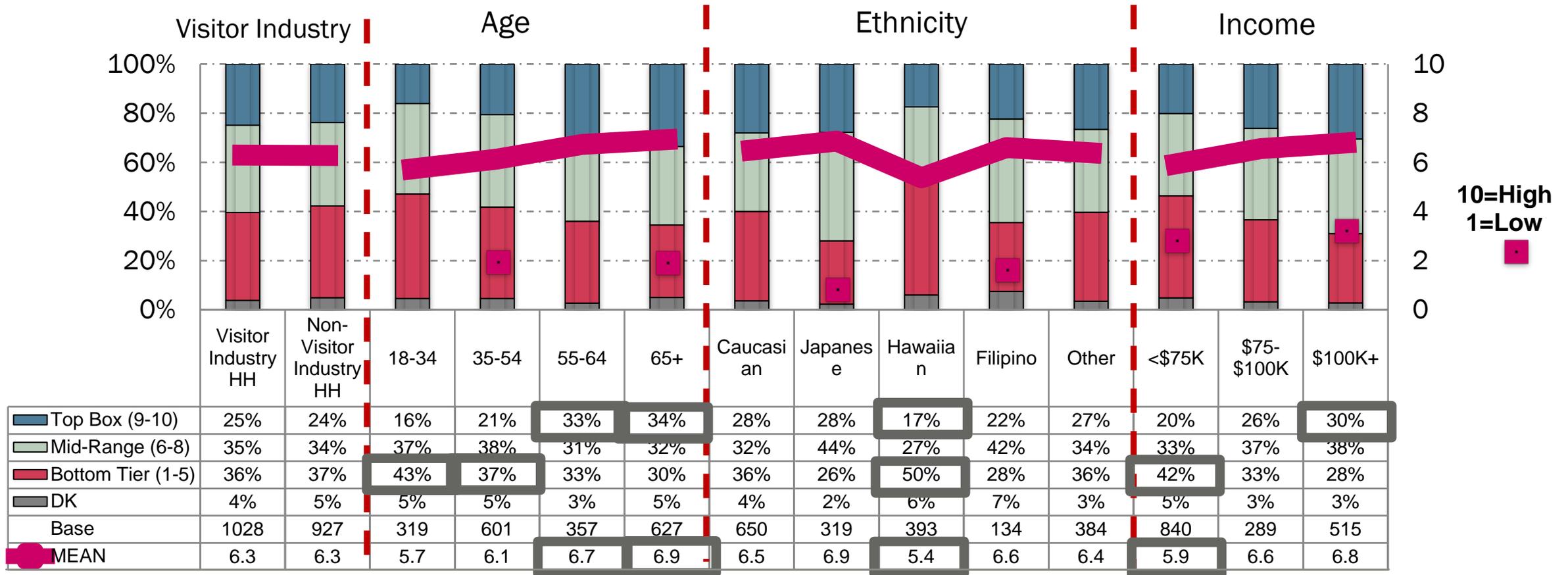
“Tourism supports other industries important to residents like agriculture”* - *By Area (Hawai‘i Island, Maui, & Kaua‘i)*



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.

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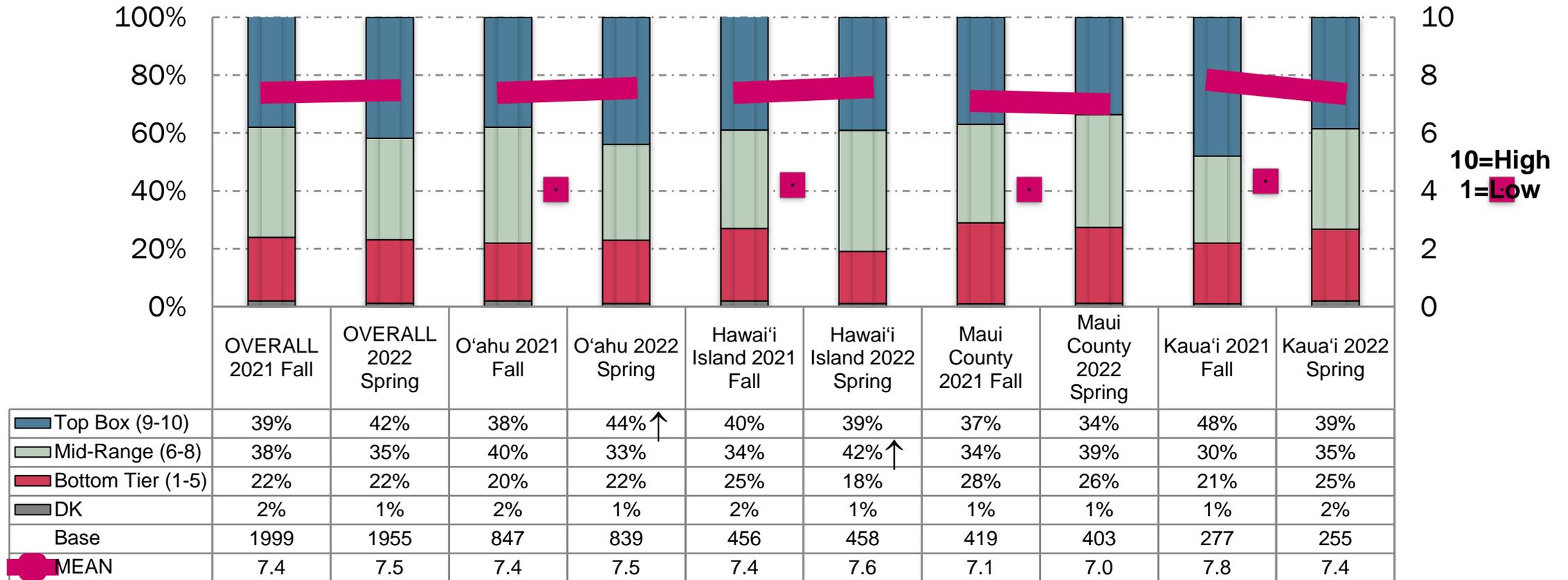
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*Note: Changed in Spring 2022 fielding from “Tourism supports other industries like agriculture.”

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



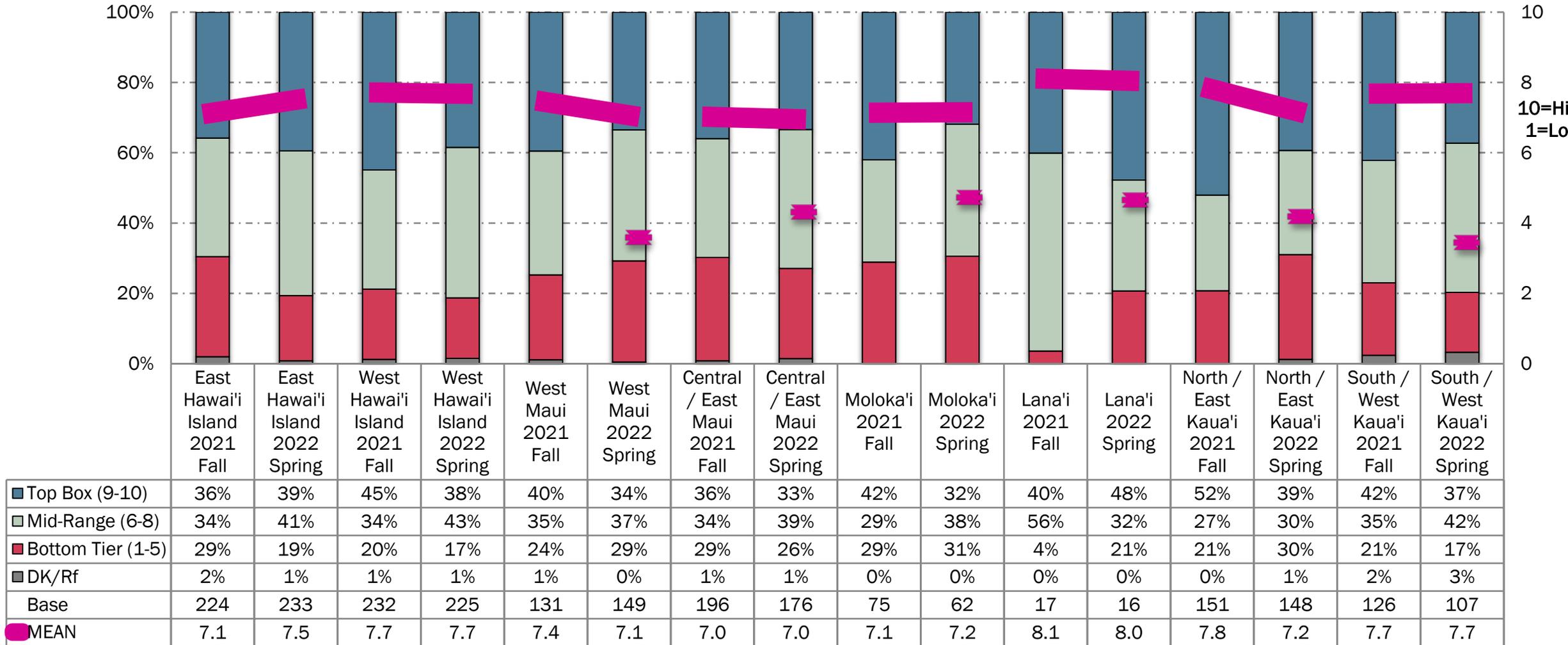
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“Tourism supports our local businesses like retail, dining, etc.” - *By Area (O'ahu)*



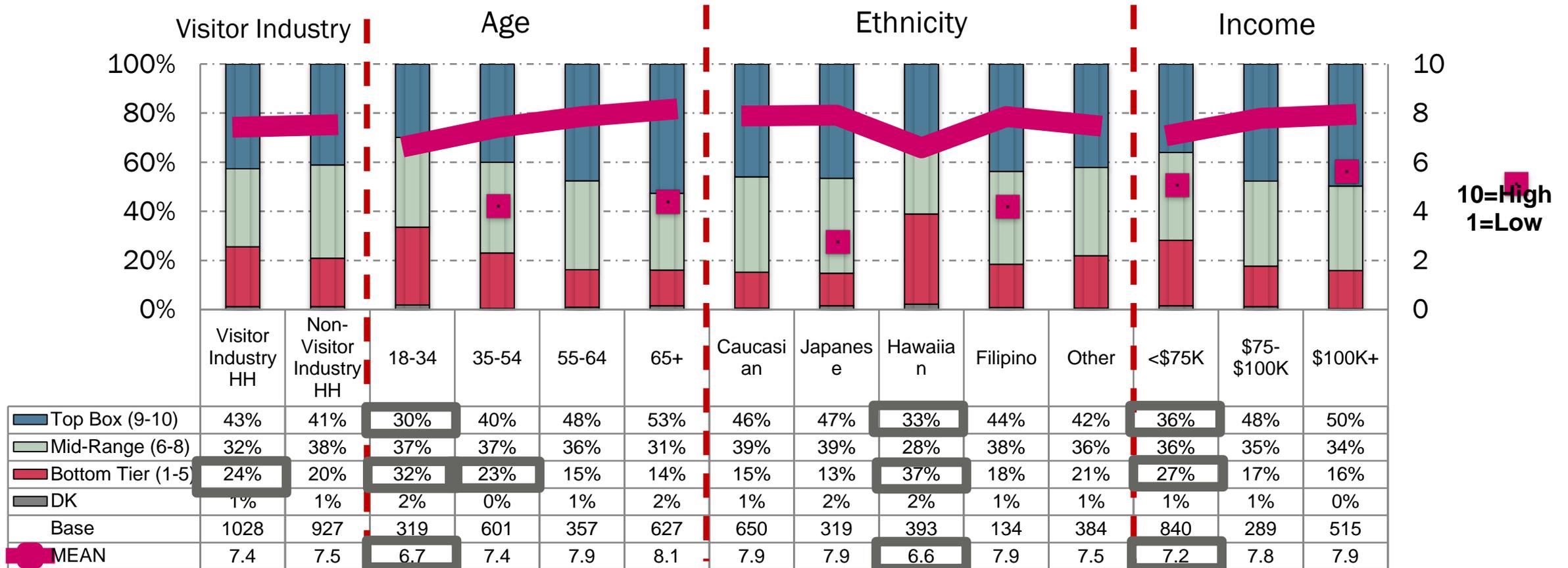
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“Tourism supports our local businesses like retail, dining, etc.” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



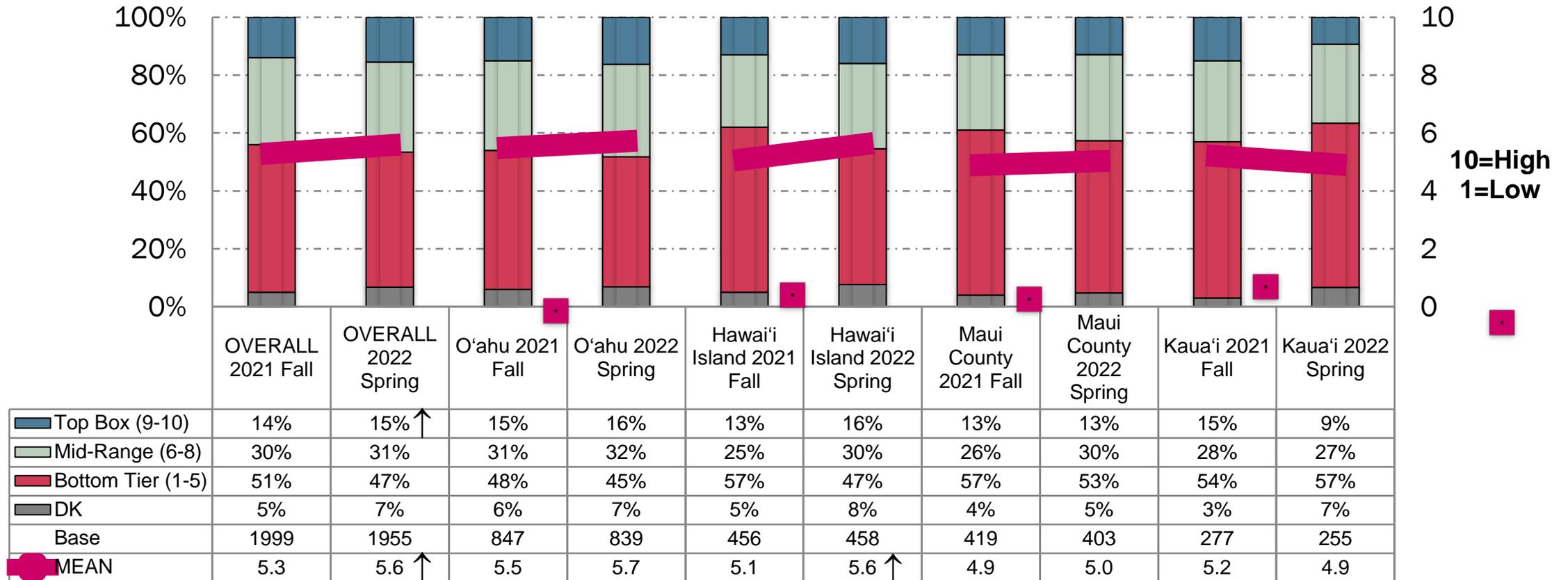
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“Tourism supports our local businesses like retail, dining, etc.” – *By Demographics*



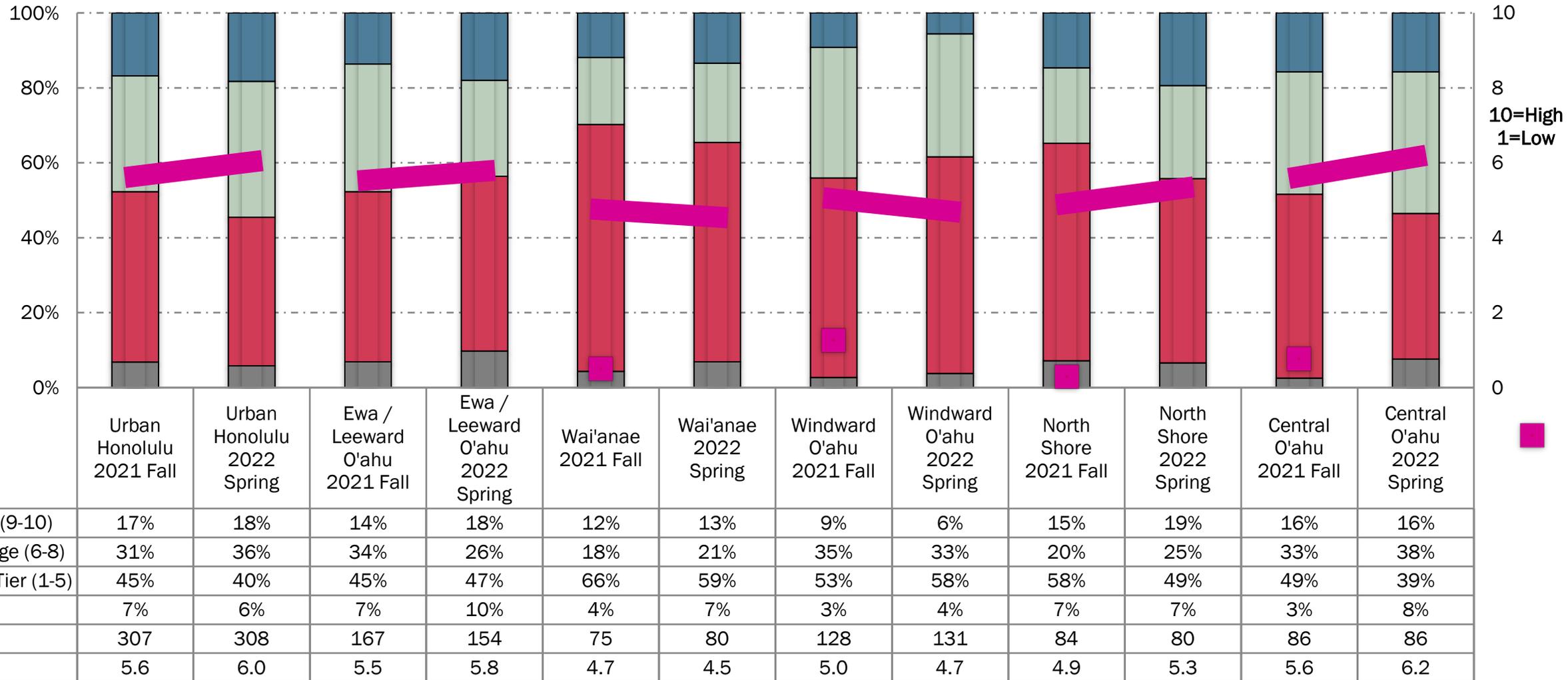
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



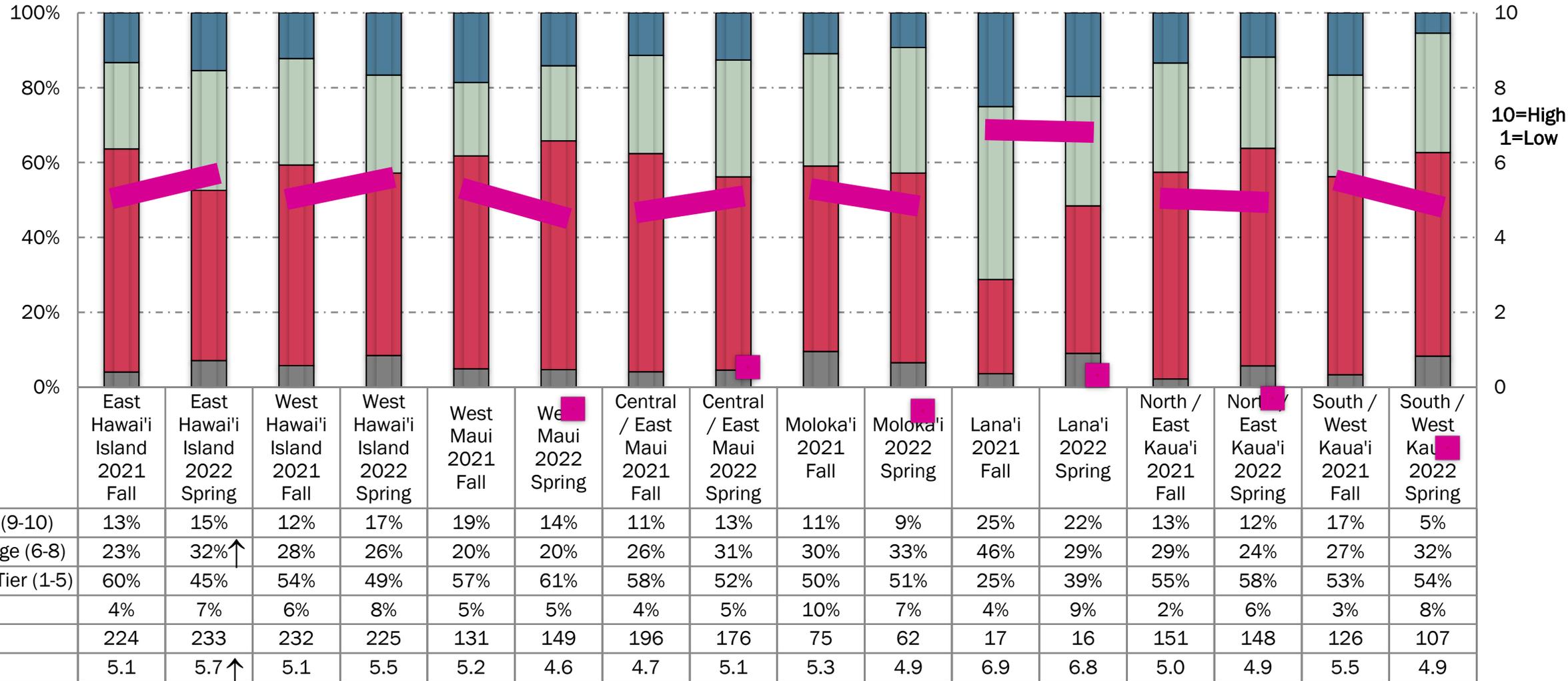
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - *By Area (O'ahu)*



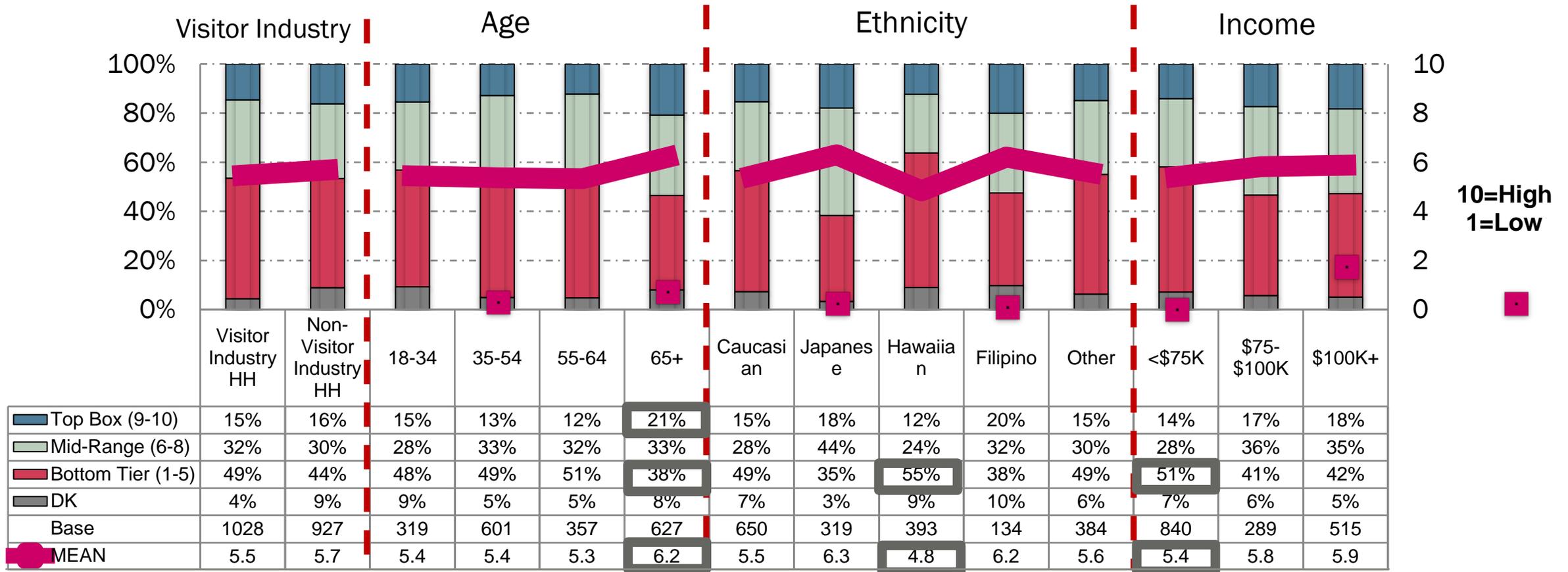
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - *By Area (Hawai'i Island, Maui, & Kaua'i)*



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

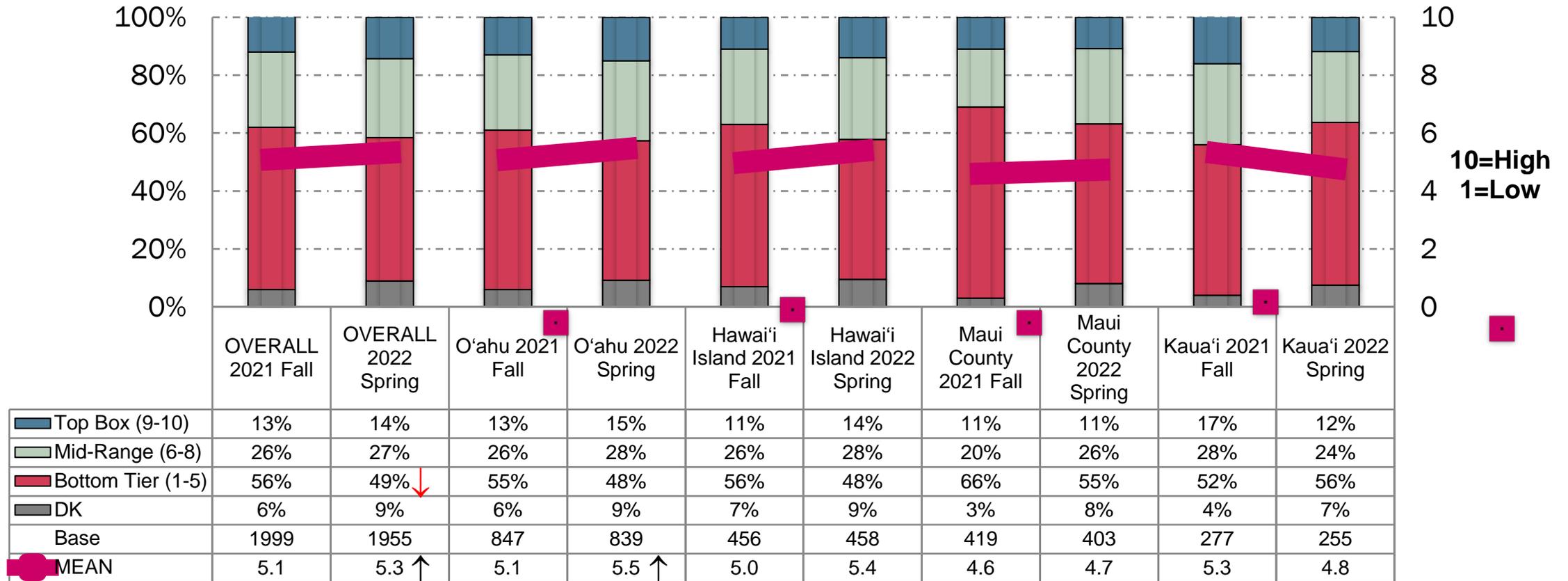
“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By Demographics*



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

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

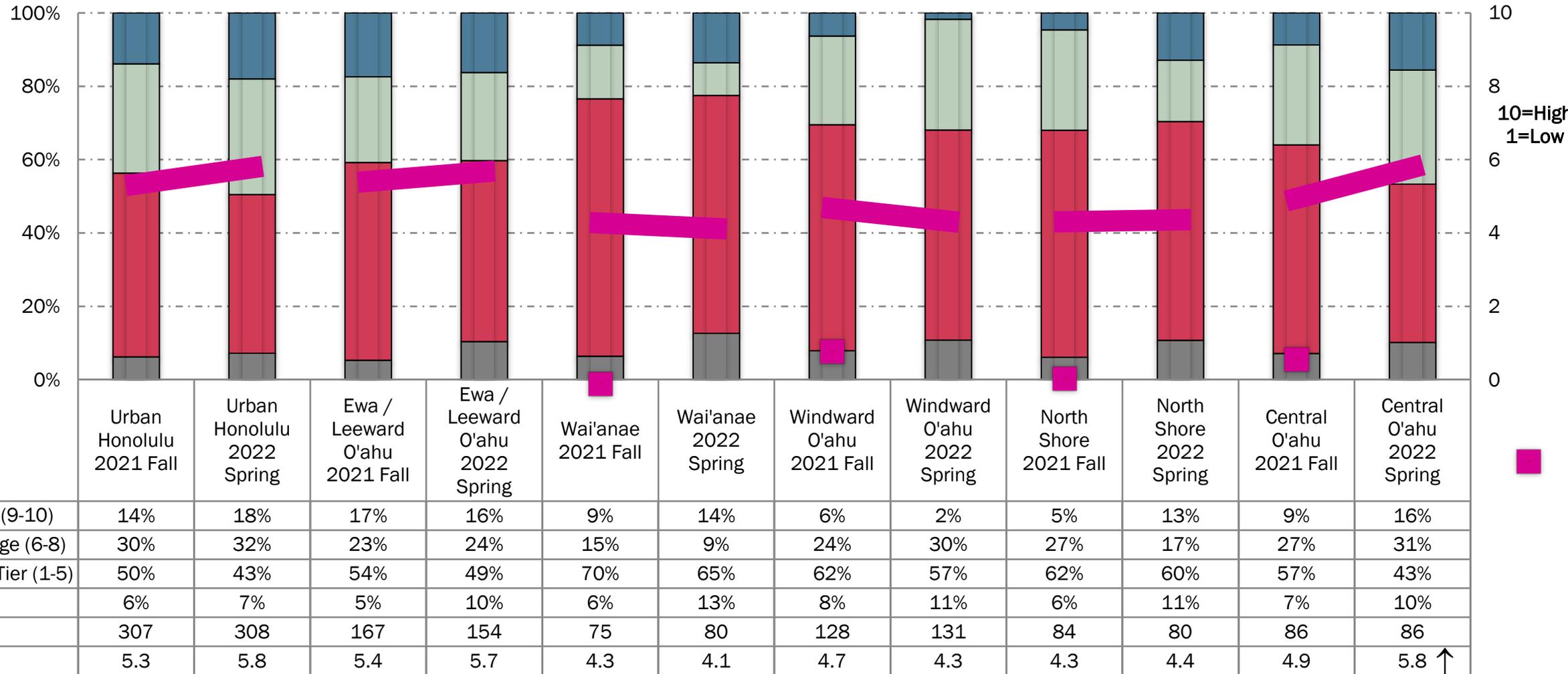
– *By Island*



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.

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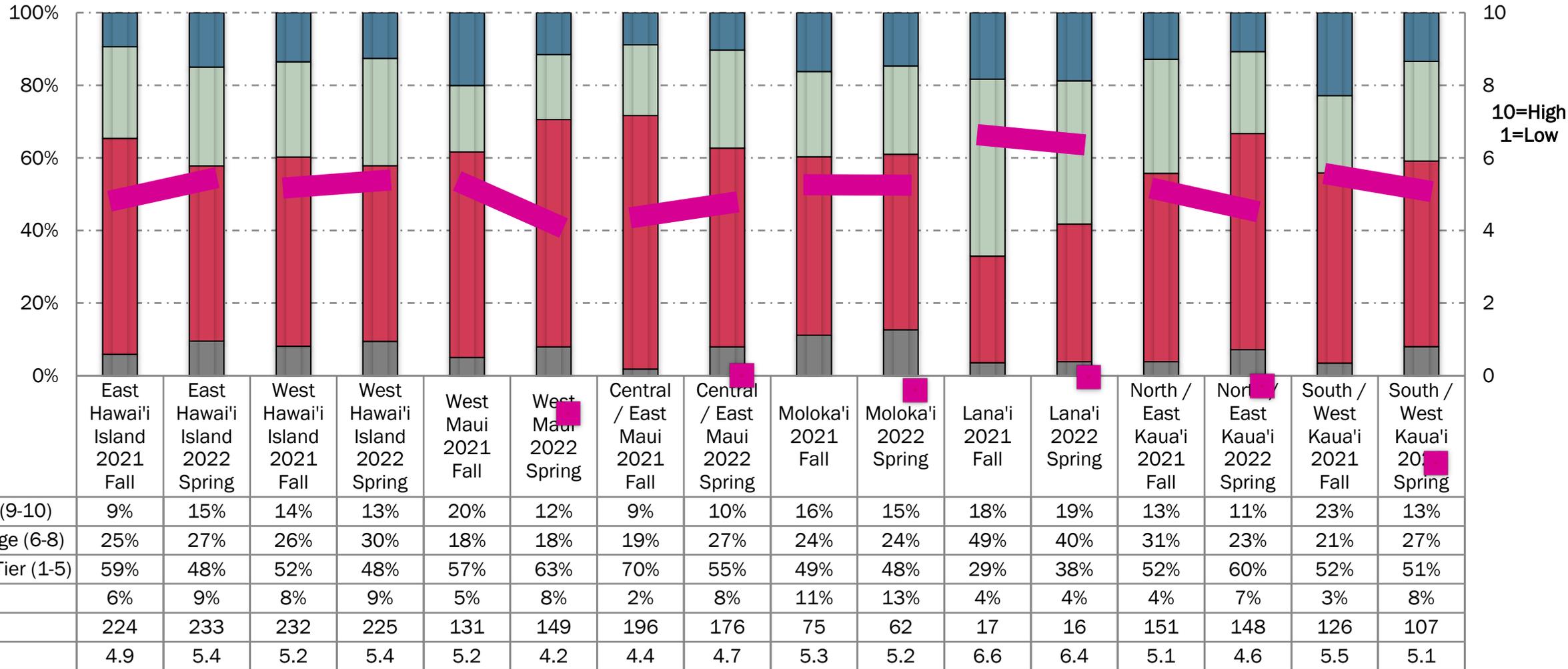
- *By Area (O'ahu)*



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

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

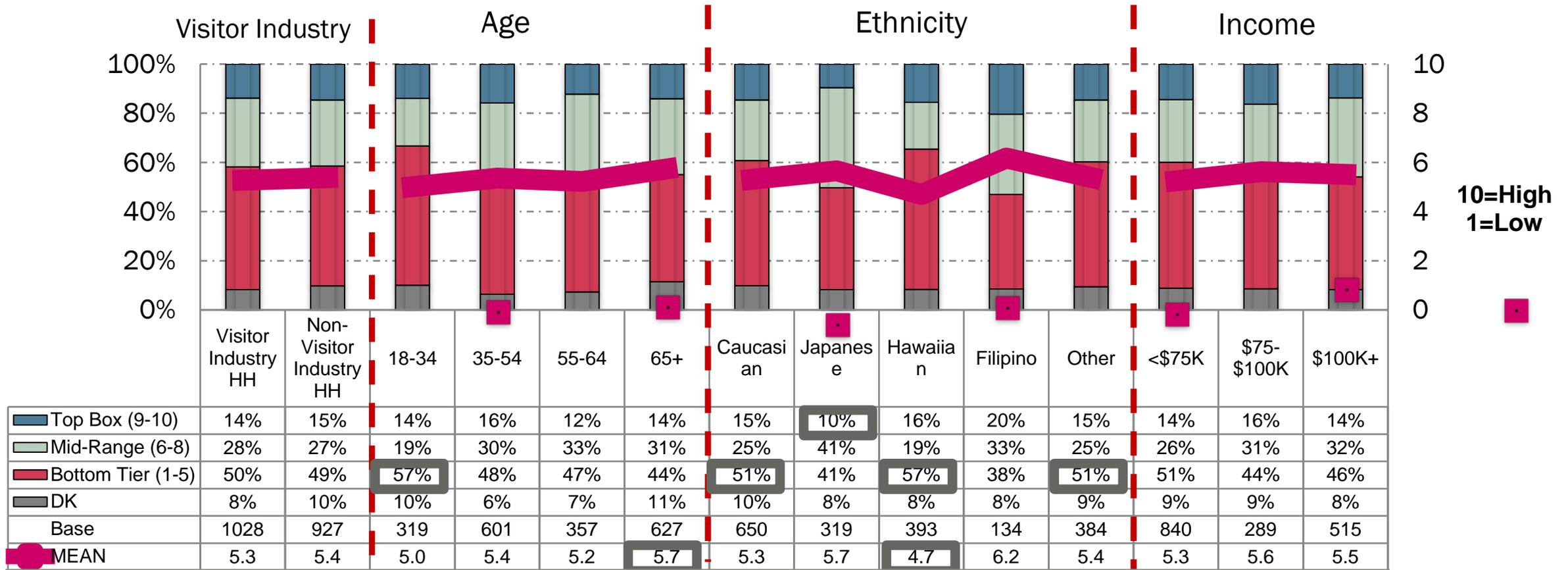
- *By Area (Hawai'i Island, Maui, & Kaua'i)*



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

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

– *By Demographics*



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Appendix A: Island Supplement

Key Recommendations & Takeaways – O‘ahu

1 *Perception of the industry is headed in a positive direction:* Overall sentiment among O‘ahu residents recovered in Spring ‘22, reversing a downward trend that began before the Covid-19 pandemic. This rebound was sufficient to lift the State as a whole on a directional basis although current perceptions are still below historic levels.

Key Resident Sentiment Tracking Statements (O‘ahu)				
Mean Score	2020	Spring 2021	Fall 2021	Spring 2022
<i>Tourism has brought more benefits than problems</i>	6.14	6.00	5.79	6.05
<i>Perceived impact of tourism on you and your family</i>	6.12	5.96	6.02	6.04
<i>Tourism is being better managed on my island</i>	NA	5.13	5.14	5.33 ↑
<i>My island is run for tourists at expense of local people</i>	6.99	6.77	7.01	6.80

Taking into account all the benefits and problems created by tourism, residents on O‘ahu and Hawai‘i Island were more likely to say that the industry should be actively encouraged on their island compared to Maui or Kaua‘i.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>Tourism should be actively encouraged on my island</i>	6.27	6.27	5.22	5.25

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

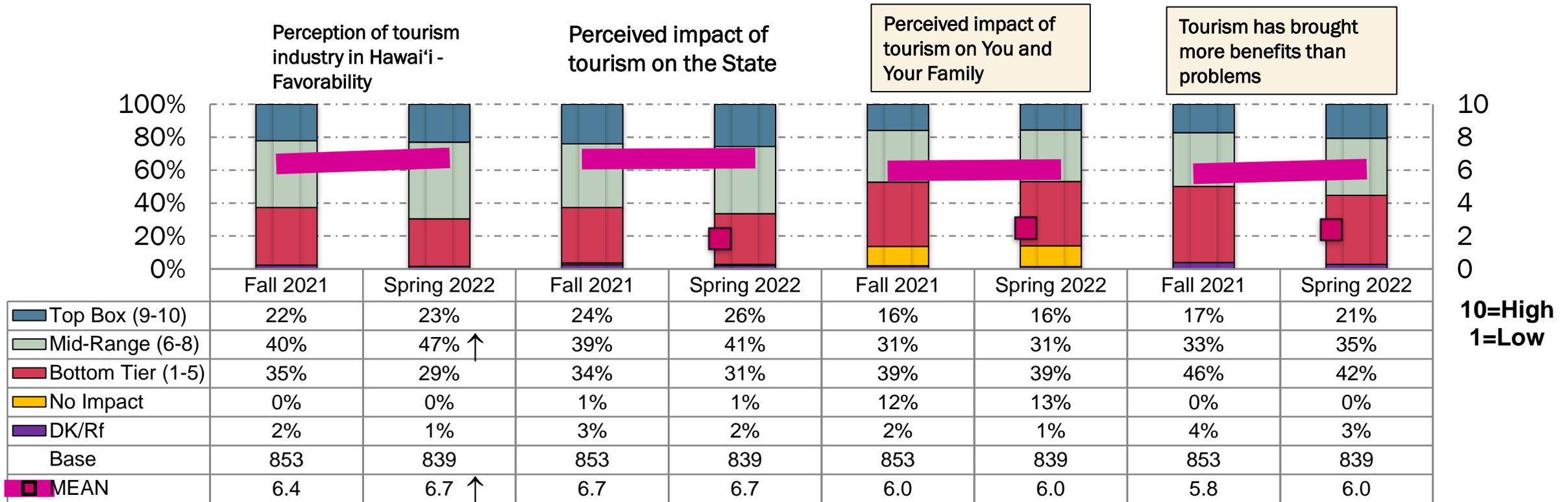
2 *Resident Sentiment did not recover across all communities:* Recovery in sentiment however was not distributed evenly throughout the island with the urban core of Honolulu, ‘Ewa/Leeward, and Central O‘ahu residents reporting improvements while those on the Windward side, North Shore, and Wai‘anae coast remaining lower.

3 *Support for Managed Tourism Strategies remain strong although differences remain in the community:* Although O‘ahu residents generally supported these initiatives, strategies resonated differently across specific island communities. Compared to Fall ‘22, support tended to grow in communities such as Windward, Wai‘anae, and the North Shore, areas with weaker sentiment of the industry.

Mean Score	Honolulu	‘Ewa Leeward	Wai‘anae	Windward	North Shore	Central
<i>No additional hotel/condo units</i>	6.5	7.0	7.6	7.3	7.1	7.4
<i>Charge Fees for parks/trails</i>	7.3	6.9	7.8	6.9	7.5	7.6
<i>Resident only days</i>	6.1	6.2	6.6	6.3	7.2	6.2
<i>Educate visitors to mālama the islands</i>	8.6	8.8	8.7	8.6	9.2	9.3
<i>Encourage visitors to give back</i>	7.2	7.0	7.5	6.6	7.3	7.4

4 Perceptions of the Hawai‘i Tourism Authority were comparable to the State overall, with O‘ahu residents reporting increases across all the organization’s areas of responsibilities.

O'ahu – Key High Level Resident Sentiment Indicators

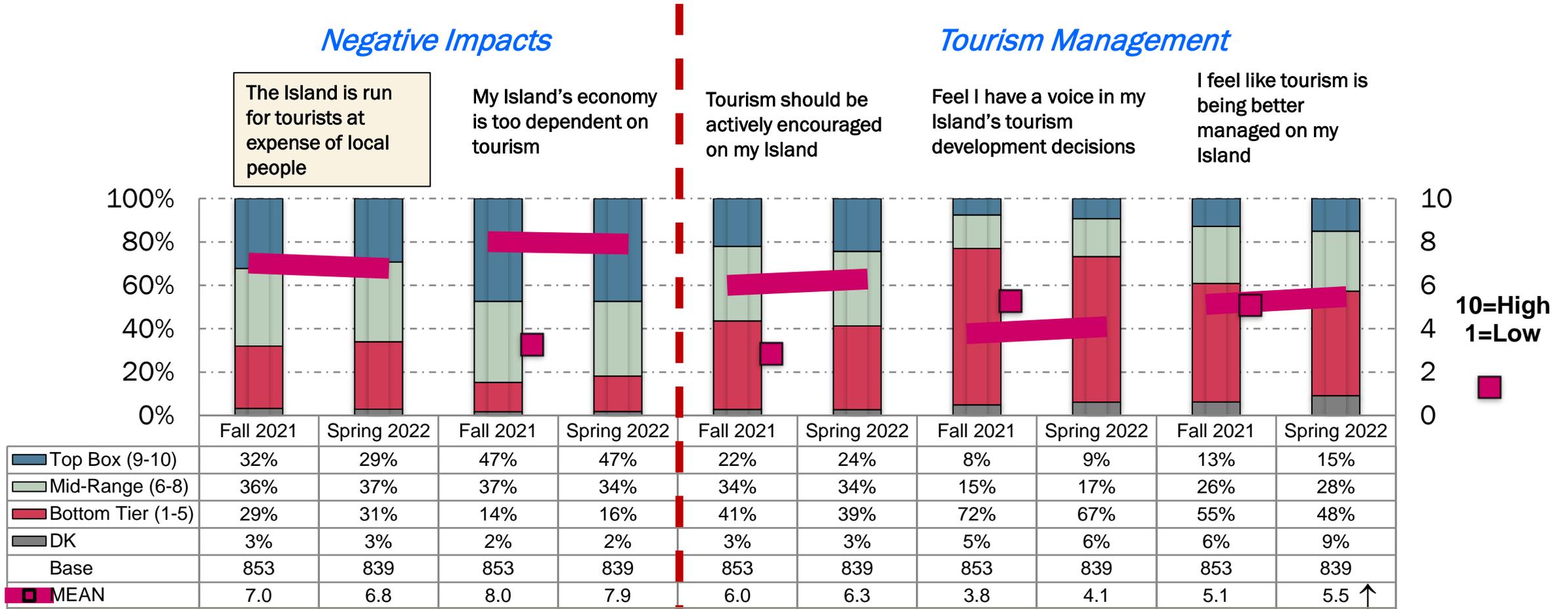


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

O'ahu – Key Island-Specific Resident Sentiment Indicators



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

Key Recommendations & Takeaways – Maui County

- 1** *Maui residents are still feeling the negative impacts of the industry.* Although sentiment improved in other counties, Maui residents continue to perceive the industry in an unfavorable light. Negative impacts (Island run for tourists, Economy too dependent) are fueling this lower sentiment and resulting in the view that Tourism is worse for residents and their families.

Key Resident Sentiment Tracking Statements (Maui County)				
Mean Score	2020	Spring 2021	Fall 2021	Spring 2022
<i>Tourism has brought more benefits than problems</i>	5.51	5.41	5.21	5.34
<i>Perceived impact of tourism on you and your family</i>	6.33	5.81	5.97	5.72
<i>My island is run for tourists at expense of local people</i>	7.08	6.93	7.18	8.01 ↑
<i>My Island's economy is too dependent on tourism</i>	8.47 ↓	7.85	7.72	8.30 ↑

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

Mean Score	Maui County	Gap to the State
<i>Creates jobs that have opportunities for advancement</i>	6.04	- 0.63
<i>Supports our local businesses</i>	7.00	- 0.48
<i>Helps sustain Hawai'i's natural resources</i>	5.53	- 0.64

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

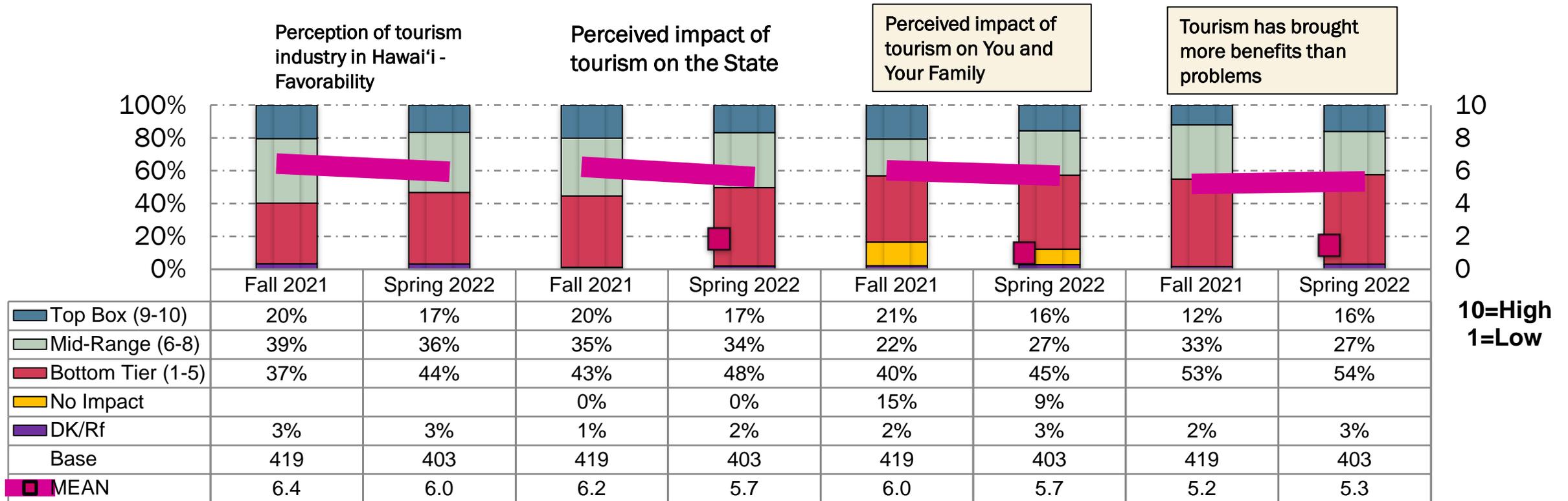
- 2** *Community trends.* Historically, the West Maui community reported strong sentiment for tourism however, in Spring '22, perceptions of the industry declined sharply, making them in line with Central/East Maui and Moloka'i perceptions. Residents of Lāna'i continue to be receptive to tourism and its benefits compared to other areas in the county.

- 3** *Residents are receptive to Managed Tourism Strategies.* Maui County is particularly amenable to better management of Accommodations and Access as potential solutions to the problems caused by the industry. Support among county residents was higher than the State overall by half a mean point or more.

Mean Score	Maui County	Gap to the State
<i>Eliminate illegal vacation rentals</i>	8.70	+ 0.70
<i>No additional hotel/condo/timeshare units</i>	8.42	+ 1.27
<i>Charge visitor access fees to state parks and trails</i>	7.96	+ 0.61
<i>Encourage visitors to volunteer and give back</i>	7.85	+ 0.57

- 4** Perception of the Hawai'i Tourism Authority slipped among Maui residents, in contrast to O'ahu and Hawai'i Island, where perceptions have improved.

Maui County – Key High Level Resident Sentiment Indicators

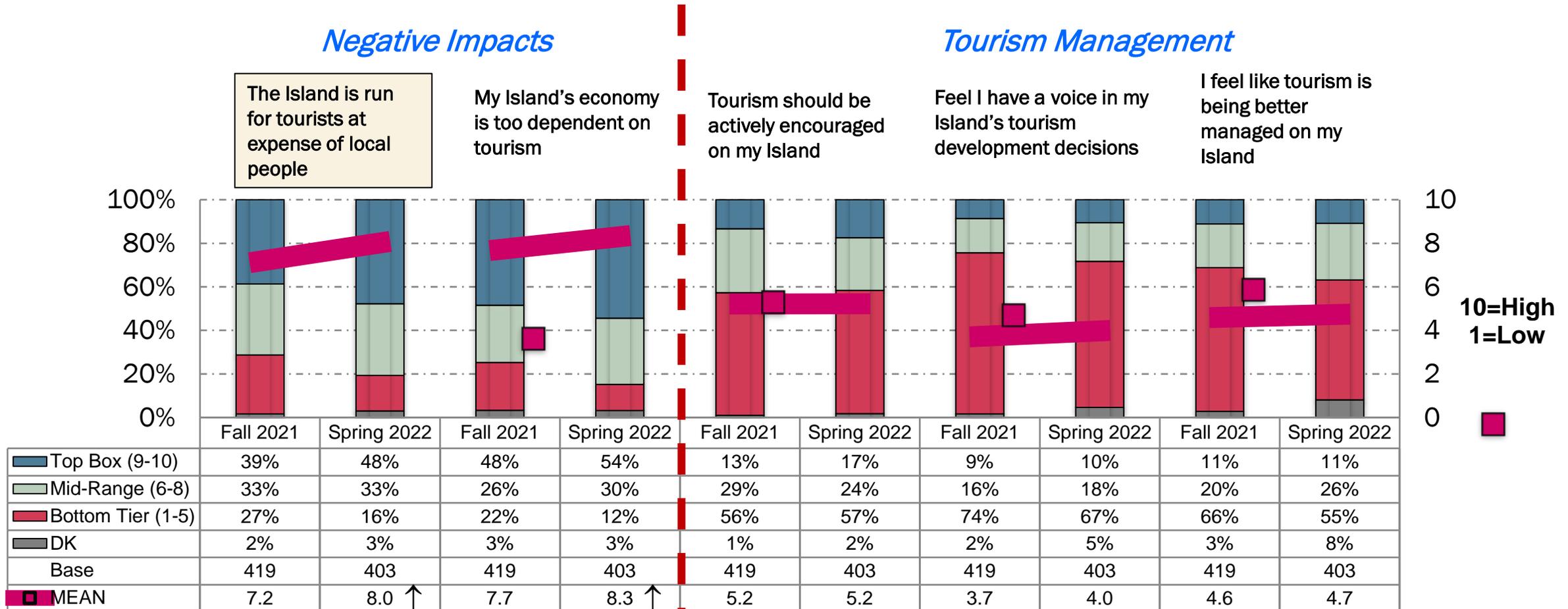


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

Maui County – Key Island-Specific Resident Sentiment Indicators



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

Key Recommendations & Takeaways – Hawai‘i Island

1 *Sentiment has rebounded to 2020 levels:* Overall indicators of resident sentiment improved in Spring '22 in the vital measures of the industry providing more benefits than problems and being better managed overall. Taken together this has resulted in better perceptions that the industry should be encouraged on Hawai‘i and is positive towards residents and their families.

Key Resident Sentiment Tracking Statements (Hawai‘i Island)				
Mean Score	2020	Spring 2021	Fall 2021	Spring 2022
<i>Tourism has brought more benefits than problems</i>	5.86	5.70	5.60	5.99
<i>Tourism is being better managed on my island</i>	NA	4.54	4.60	4.73
<i>Perceived impact of tourism on you and your family</i>	6.02	5.81	5.91	6.18 ↑
<i>Tourism should be actively encouraged on my Island</i>	6.12	6.15	5.78	6.27
<i>My island is run for tourists at expense of local people</i>	6.51	6.59	6.63	6.51

Opinions that Hawai‘i island’s economy is too dependent on tourism was significantly lower compared to the other counties and further evidence that residents want to encourage more visitors.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>My island’s economy is too dependent on tourism</i>	7.91	7.18	8.30	7.86

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

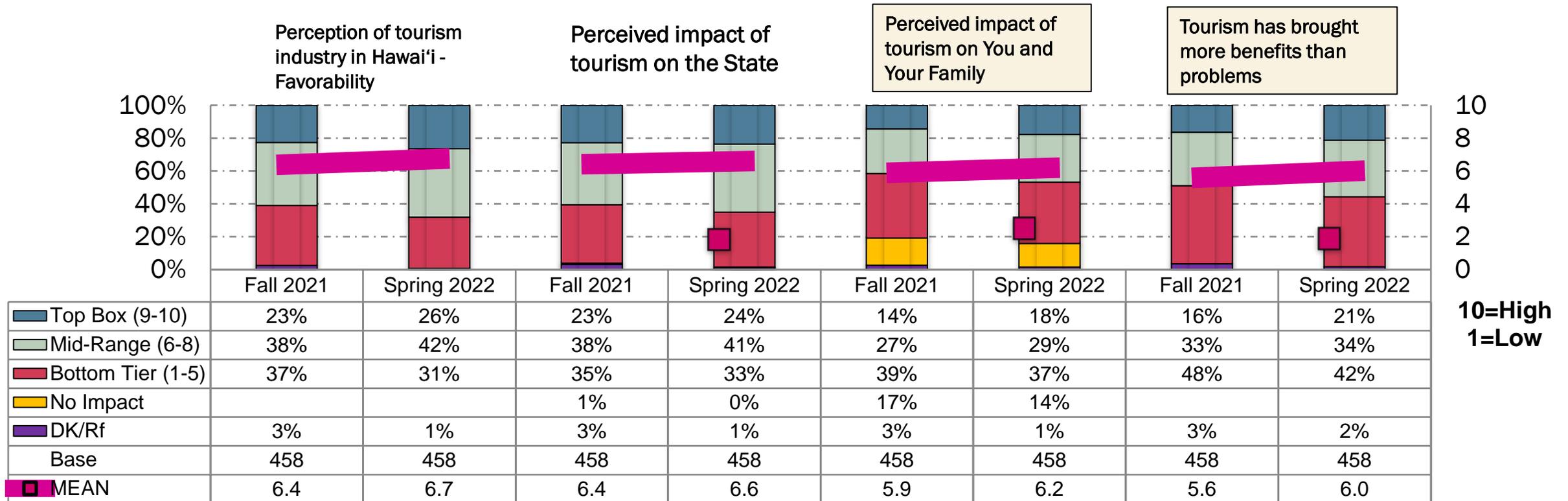
2 *Community Differences:* Support for the industry rose in Eastern Hawai‘i communities, lifting the island as a whole while West Hawai‘i continued to report strong sentiment. This is noteworthy as Eastern Hawai‘i historically has been skeptical of the industry and the benefits provided.

3 *Support for Managed Tourism Strategies aligns with the problems generated by the industry:* Hawai‘i Island residents were in-line with O‘ahu on their reception to management strategies. While those on Hawai‘i island were generally supportive of measures to manage Accommodations, Access, and Education – residents of Maui and Kaua‘i reported greater support for these measures.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>Eliminate illegal vacation rentals</i>	7.85	7.88	8.70	8.84
<i>No additional hotel/ condo/timeshare units</i>	6.93	6.85	8.42	8.27
<i>Charge visitor access fees to state parks and trails</i>	7.20	7.43	7.96	7.92
<i>Encourage visitors to volunteer and give back</i>	7.10	7.48	7.85	7.90

4 Perceptions of the Hawai‘i Tourism Authority climbed favorably among residents across all areas of responsibilities: Marketing, Promoting a vision of sustainability, Educating visitors, Communicating and Listening, and Balancing the needs of residents.

Hawai'i Island – Key High Level Resident Sentiment Indicators

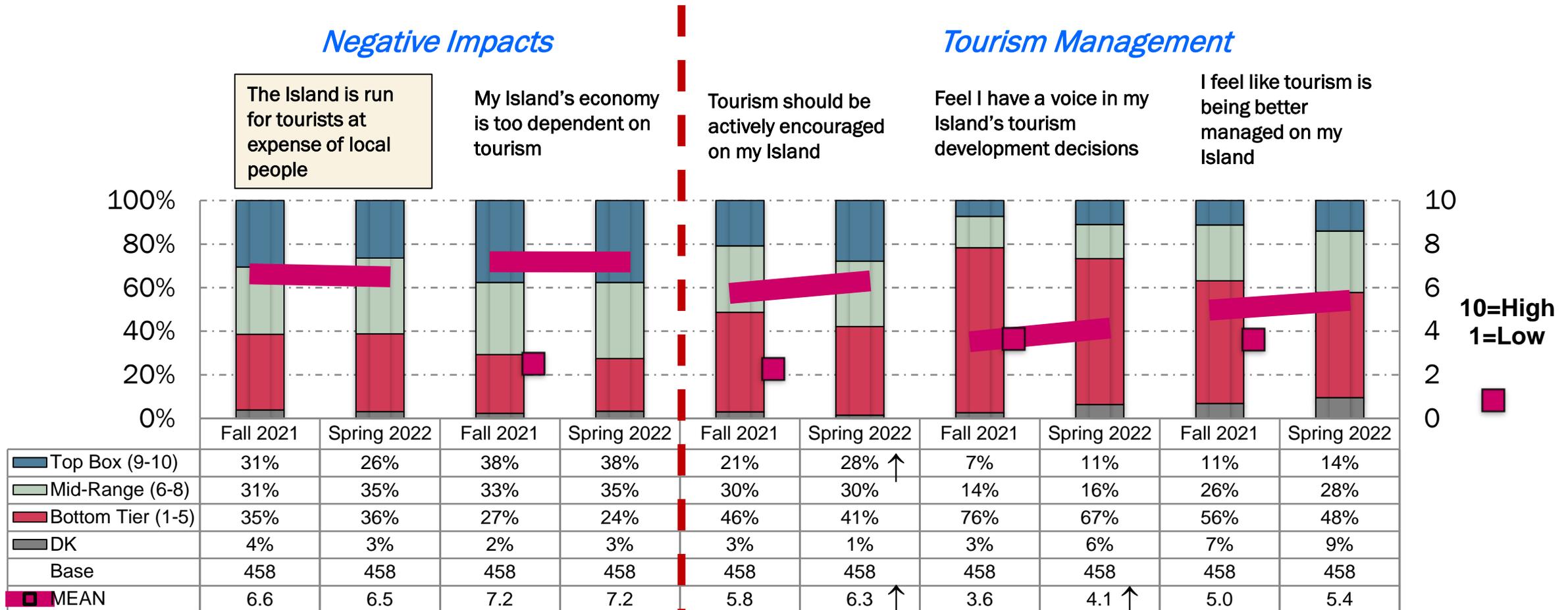


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

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



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

Key Recommendations & Takeaways – Kaua‘i

1 *Key Sentiment Indicators are mixed among residents:* While some progress was made in that tourism’s benefits outweigh the problems, management of the industry is perceived to be slipping. Moreover, many felt the negative impacts of the industry and that their island is being run for tourists. To sum things up, overall sentiment of the industry continues to decline among Kaua‘i residents leading them to say tourism continues to have an unfavorable impact on them and their families.

Key Resident Sentiment Tracking Statements (Kaua‘i)				
Mean Score	2020	Spring 2021	Fall 2021	Spring 2022
<i>Tourism has brought more benefits than problems</i>	6.00	5.48	5.22	5.61
<i>Perceived impact of tourism on you and your family</i>	5.83	5.74	6.27	5.97
<i>Tourism is being better managed on my island</i>	NA	5.23	5.26	4.79
<i>My island is run for tourists at expense of local people</i>	6.95	7.04	7.07	7.43

Attitudes on the industry were lower compared to the State of Hawai‘i overall, with residents emphasizing that they do not perceive that management of the industry is benefiting them.

Mean Score	Kaua‘i	Gap to the State
<i>Tourism helps fund stewardship of Hawai‘i’s natural resources, parks and cultural sites</i>	5.35	- 0.82
<i>Tourism should be actively encouraged on my island</i>	5.25	- 0.85
<i>My island is run for tourists at expense of local people</i>	7.43	+ 0.50

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

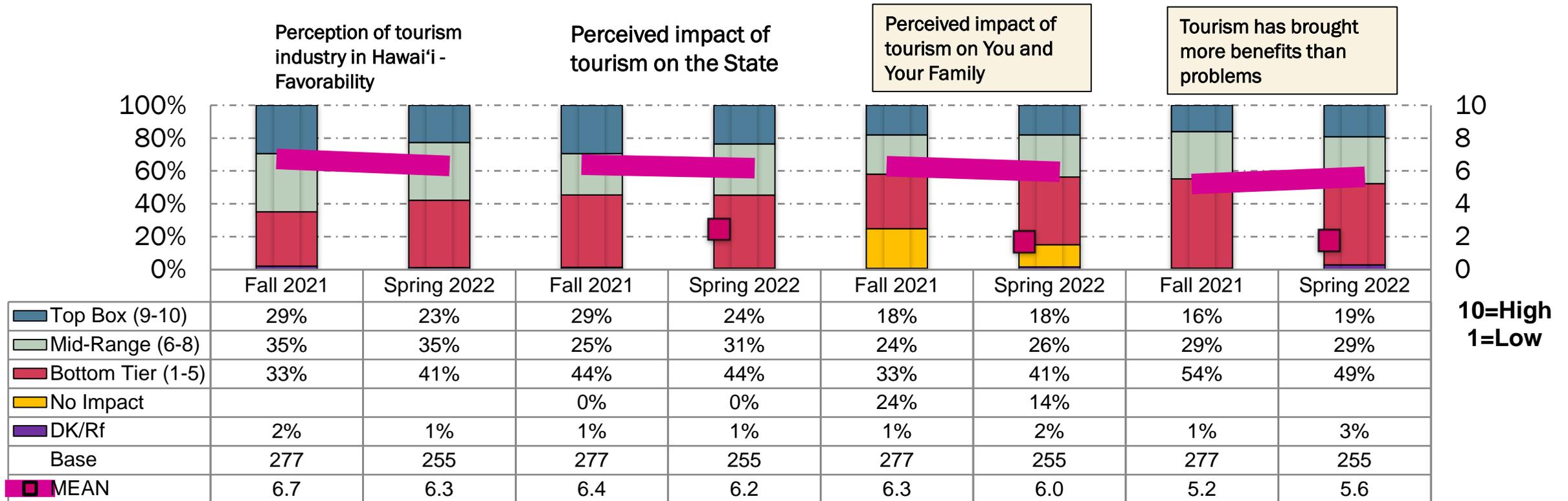
2 *Resident Sentiment did not recover across all communities:* While perceptions of the industry held or improved in the South/Western communities, attitudes in the North/East weakened, resulting in the lower sentiment for the island as a whole.

3 *Kaua‘i reports stronger support for Managed Tourism Strategies:* Residents are supportive of strategies to better manage the industry compared to the State overall related to Accommodations, Access, and Educating visitors in order to mitigate the negative impacts.

Mean Score	Kaua‘i	Gap to the State
<i>Eliminate illegal vacation rentals</i>	8.84	+ 0.84
<i>No additional hotel/condo/timeshare units</i>	8.27	+ 1.12
<i>Stop approval of additional legal vacation rentals</i>	7.83	+ 0.91
<i>Designate resident-only days at parks, beaches, etc.</i>	7.46	+ 1.02

4 Perception of the Hawai‘i Tourism Authority although strong, remained stable among Kaua‘i residents, in contrast to other counties which reported improvements in leadership, educating visitors, and supporting Native Hawaiian culture.

Kaua'i – Key High Level Resident Sentiment Indicators

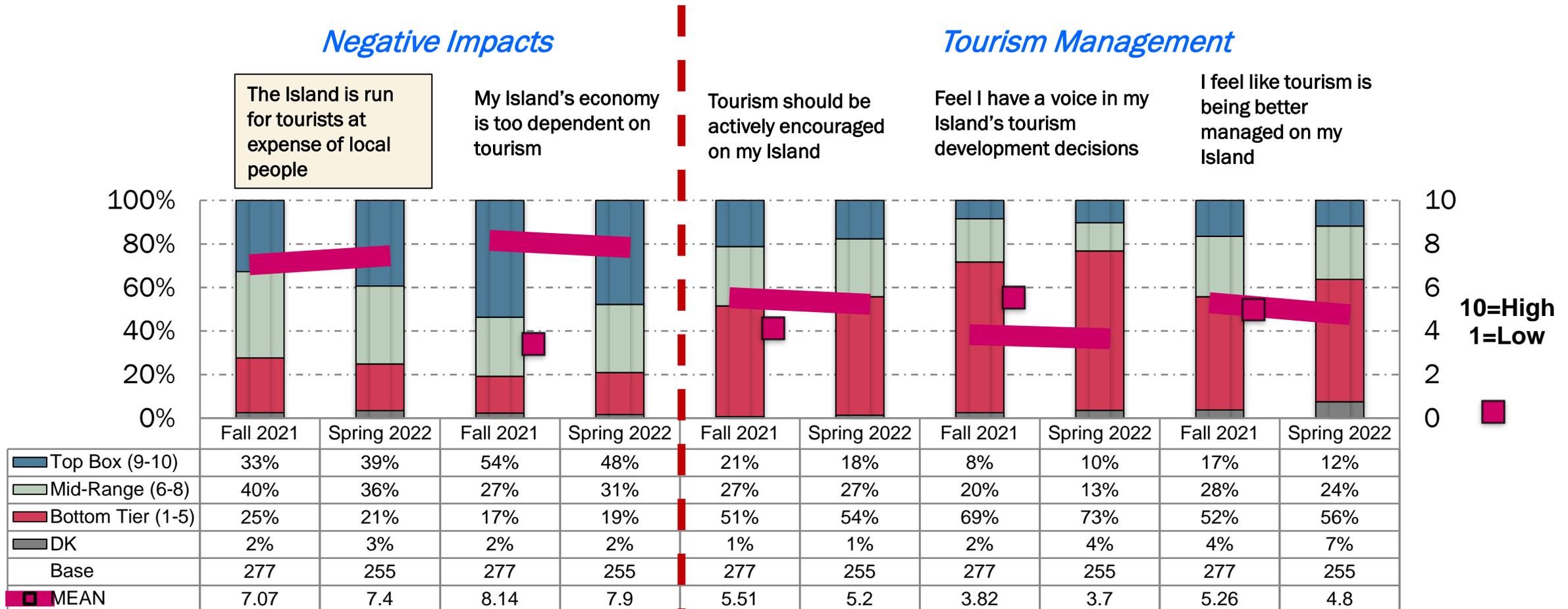


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

Kaua'i – Key Island-Specific Resident Sentiment Indicators



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



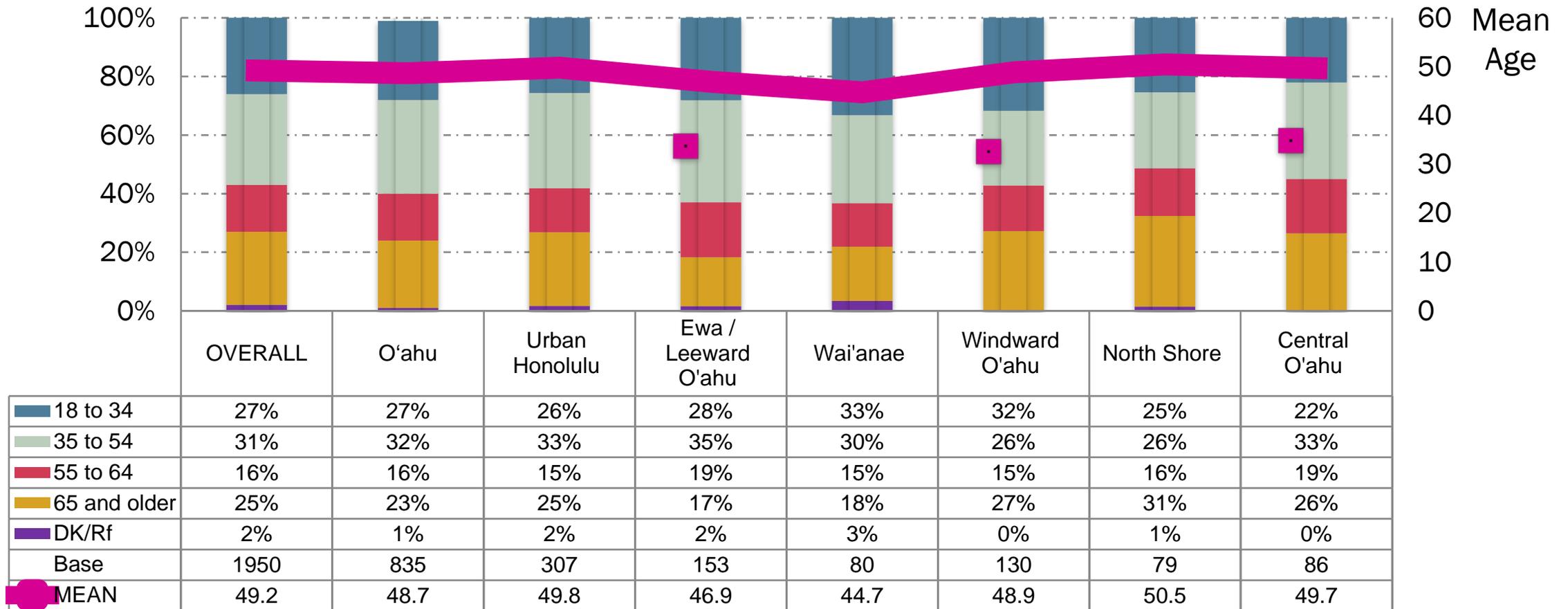
Appendix B: Respondent Profile

Respondent Age



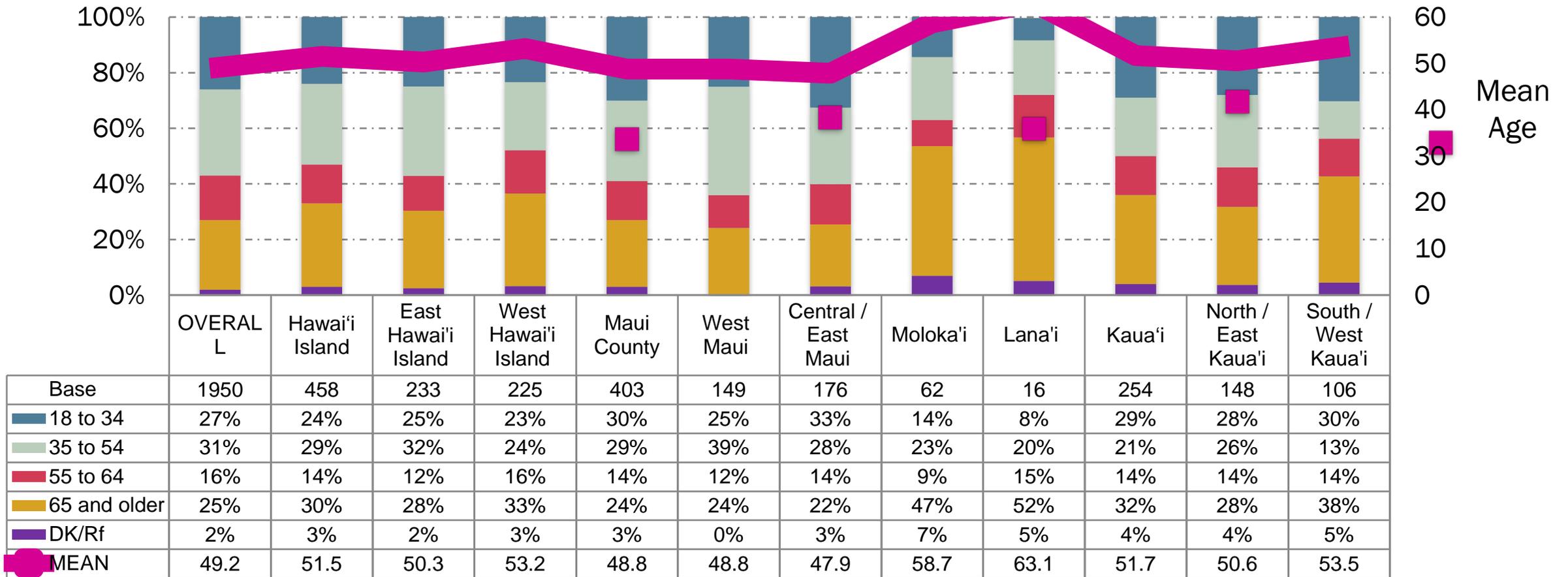
D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

Respondent Age (*By Area - Hawai'i Island, Maui, & Kaua'i*)



D1: What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	20%	15%	30%	29%	28%
Japanese	18%	23%	9%	8%	9%
Hawaiian	23%	21%	26%	28%	23%
Filipino	10%	9%	9%	14%	17%
Other	29%	32%	26%	22%	22%

D2: What is your ethnic background?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Caucasian	20%	15%	15%	11%	14%	25%	32%	16%
Japanese	18%	23%	26%	23%	2%	13%	2%	38%
Hawaiian	23%	21%	17%	21%	47%	30%	21%	14%
Filipino	10%	9%	6%	17%	10%	3%	13%	6%
Other	29%	32%	37%	28%	27%	30%	31%	26%

D2: What is your ethnic background?

Respondent Ethnicity

(By Area - Hawai'i Island, Maui, & Kaua'i)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Caucasian	20%	30%	25%	38%	29%	30%	29%	23%	15%	28%	30%	24%
Japanese	18%	9%	13%	5%	8%	10%	8%	4%	12%	9%	12%	5%
Hawaiian	23%	26%	26%	26%	28%	27%	27%	55%	5%	23%	20%	28%
Filipino	10%	9%	10%	7%	14%	13%	13%	4%	45%	17%	11%	27%
Other	29%	26%	27%	24%	22%	21%	23%	13%	23%	22%	26%	16%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	51%	50%	55%	52%	46%
3-4	31%	33%	27%	30%	31%
5-6	10%	10%	11%	10%	14%
7+	6%	5%	7%	7%	8%
REFUSED	4%	3%	4%	5%	6%
MEAN	2.9	2.9	2.9	2.8	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	51%	50%	61%	40%	32%	49%	34%	43%
3-4	31%	33%	27%	39%	29%	35%	40%	40%
5-6	10%	10%	6%	11%	24%	9%	14%	15%
7+	6%	5%	3%	8%	12%	7%	9%	3%
REFUSED	4%	3%	3%	4%	3%	2%	4%	-
MEAN	2.9	2.9	2.4	3.1	3.9	3.1	3.6	3.0

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

Household Size

(By Area - Hawai'i Island, Maui, & Kaua'i)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	51%	55%	57%	52%	52%	41%	53%	56%	70%	46%	51%	37%
3-4	31%	27%	24%	31%	30%	30%	31%	25%	5%	31%	28%	35%
5-6	10%	11%	12%	9%	10%	18%	9%	8%	8%	14%	13%	16%
7+	6%	7%	7%	7%	7%	7%	6%	11%	17%	8%	6%	12%
REFUSED	4%	4%	4%	4%	5%	4%	5%	6%	5%	6%	6%	5%
MEAN	2.9	2.9	2.8	2.9	2.8	3.5	2.7	2.7	3.0	3.1	2.9	3.4

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	30%	31%	27%	31%	31%
Married	43%	44%	44%	42%	38%
Divorced, separated, widowed	18%	17%	18%	18%	21%
Domestic Partnership	5%	6%	6%	4%	2%
Other	1%	0%	1%	1%	1%
Refused	3%	3%	4%	4%	7%

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	30%	31%	32%	33%	38%	29%	17%	20%
Married	43%	44%	37%	42%	33%	52%	55%	68%
Divorced, separated, widowed	18%	17%	20%	18%	12%	16%	21%	6%
Domestic Partnership	5%	6%	7%	4%	16%	2%	3%	2%
Other	1%	0%	1%	-	-	-	-	-
Refused	3%	3%	2%	3%	1%	1%	4%	4%

D4: What is your marital status?

Marital Status (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Single, never married	30%	27%	31%	22%	31%	26%	33%	11%	20%	31%	27%	36%
Married	43%	44%	39%	50%	42%	48%	41%	56%	28%	38%	40%	35%
Divorced, separated, widowed	18%	18%	18%	17%	18%	16%	18%	23%	42%	21%	19%	23%
Domestic Partnership	5%	6%	7%	3%	4%	4%	3%	6%	5%	2%	4%	-
Other	1%	1%	1%	2%	1%	2%	1%	-	-	1%	1%	-
Refused	3%	4%	4%	4%	4%	5%	4%	5%	5%	7%	8%	6%

D4: What is your marital status?

Education

	OVERALL	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
H.S. or less	21%	19%	24%	27%	25%
Bus/ Trade School/Some college	30%	31%	30%	28%	25%
College Graduate	47%	49%	42%	42%	45%
DK/Refused	2%	1%	3%	3%	5%

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

Education (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
H.S. or less	21%	19%	16%	22%	39%	15%	24%	16%
Bus/ Trade School/Some college	30%	31%	27%	32%	37%	33%	26%	35%
College Graduate	47%	49%	56%	44%	24%	49%	49%	49%
DK/Refused	2%	1%	1%	1%	0%	3%	1%	0%

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

Education (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
H.S. or less	21%	24%	25%	23%	27%	31%	26%	26%	32%	25%	28%	21%
Bus/ Trade School/Some college	30%	30%	31%	30%	28%	27%	29%	19%	17%	25%	22%	29%
College Graduate	47%	42%	41%	44%	42%	39%	42%	50%	46%	45%	45%	45%
DK/Refused	2%	3%	3%	3%	3%	3%	2%	5%	5%	5%	5%	4%

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

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	59%	59%	55%	63%	59%
Not Employed	41%	41%	45%	37%	41%

D6: Are you currently employed?

Employment Status (*By Area*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Currently Employed	59%	59%	60%	65%	48%	53%	54%	56%
Not Employed	41%	41%	40%	35%	52%	47%	46%	44%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	59%	55%	54%	58%	63%	71%	62%	48%	50%	59%	64%	51%
Not Employed	41%	45%	46%	42%	37%	29%	38%	52%	50%	41%	36%	49%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	43%	45%	38%	33%	39%
FEMALE	57%	55%	62%	67%	61%

D7: What is your gender?

Gender (*By Area*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
MALE	43%	45%	50%	41%	36%	43%	41%	44%
FEMALE	57%	55%	50%	59%	64%	57%	59%	56%

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
MALE	43%	38%	36%	42%	33%	45%	31%	32%	35%	39%	39%	39%
FEMALE	57%	62%	64%	58%	67%	55%	69%	68%	65%	61%	61%	61%

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	11%	11%	9%	15%	8%
Management	7%	7%	6%	5%	5%
Admin/clerical	7%	9%	4%	2%	5%
Service	5%	4%	4%	9%	8%
Sales	7%	7%	6%	6%	5%
Retired	24%	22%	28%	24%	28%
Other	36%	35%	42%	37%	39%
Unemployed	7%	8%	6%	6%	4%

D8: What is your occupation?

Occupation (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Professional	11%	11%	14%	10%	4%	6%	14%	3%
Management	7%	7%	5%	8%	9%	12%	1%	12%
Admin/clerical	7%	9%	9%	9%	3%	14%	5%	7%
Service	5%	4%	5%	3%	4%	2%	5%	2%
Sales	7%	7%	7%	10%	4%	2%	4%	8%
Retired	24%	22%	22%	19%	22%	24%	30%	26%
Other	36%	35%	29%	33%	41%	33%	40%	34%
Unemployed	7%	8%	9%	7%	13%	8%	2%	8%

Occupation (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Professional	11%	9%	7%	11%	15%	13%	15%	16%	13%	8%	11%	4%
Management	7%	6%	6%	6%	5%	7%	5%	3%	-	5%	4%	6%
Admin/clerical	7%	4%	4%	5%	2%	4%	2%	2%	-	5%	7%	1%
Service	5%	4%	2%	6%	9%	8%	10%	-	17%	8%	8%	6%
Sales	7%	6%	7%	4%	6%	8%	7%	5%	-	5%	5%	4%
Retired	24%	28%	26%	31%	24%	20%	23%	49%	40%	28%	21%	38%
Other	36%	42%	41%	33%	37%	35%	32%	25%	30%	39%	41%	34%
Unemployed	7%	6%	8%	3%	6%	4%	7%	0%	0%	4%	3%	5%

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	14%	15%	17%	13%	6%
\$25K-\$35K	9%	9%	10%	6%	4%
\$35K-\$50K	11%	12%	11%	8%	10%
\$50K-\$75K	11%	9%	14%	17%	18%
\$75K-\$100K	15%	15%	13%	17%	15%
\$100K-\$150K	16%	17%	11%	14%	13%
\$150K-\$200K	7%	7%	3%	5%	8%
\$200K+	5%	5%	3%	3%	5%
DK/ Rf	13%	10%	18%	19%	20%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
<\$25K	14%	15%	13%	19%	28%	12%	13%	8%
\$25K-\$35K	9%	9%	11%	8%	11%	9%	6%	4%
\$35K-\$50K	11%	12%	13%	8%	11%	7%	10%	21%
\$50K-\$75K	11%	9%	9%	10%	9%	11%	14%	5%
\$75K-\$100K	15%	15%	15%	16%	14%	12%	10%	24%
\$100K-\$150K	16%	17%	15%	21%	10%	22%	8%	15%
\$150K-\$200K	7%	7%	7%	7%	2%	8%	9%	12%
\$200K+	5%	5%	9%	3%	1%	3%	2%	2%
DK/ Rf	13%	10%	9%	8%	14%	16%	29%	8%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

Household Income (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
<\$25K	14%	17%	21%	12%	13%	18%	12%	9%	17%	6%	5%	9%
\$25K-\$35K	9%	10%	13%	5%	6%	3%	6%	11%	9%	4%	2%	8%
\$35K-\$50K	11%	11%	9%	13%	8%	10%	7%	6%	21%	10%	13%	6%
\$50K-\$75K	11%	14%	15%	11%	17%	12%	17%	19%	9%	18%	14%	25%
\$75K-\$100K	15%	13%	11%	16%	17%	12%	18%	9%	4%	15%	16%	14%
\$100K-\$150K	16%	11%	10%	12%	14%	16%	14%	11%	-	13%	15%	10%
\$150K-\$200K	7%	3%	3%	4%	5%	5%	5%	4%	8%	8%	12%	2%
\$200K+	5%	3%	2%	5%	3%	7%	2%	5%	4%	5%	5%	5%
DK/ Rf	13%	18%	16%	22%	19%	15%	18%	28%	28%	20%	18%	22%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?

Years in Hawai'i

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Less than 10 years	14%	14%	16%	12%	11%
10 to 19 years	9%	8%	12%	12%	8%
20 years or more	20%	20%	20%	25%	21%
Born in Hawai'i	54%	56%	48%	49%	56%
DK/ Rf	2%	2%	4%	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	14%	14%	14%	16%	9%	15%	13%	15%
10 to 19 years	9%	8%	7%	9%	6%	11%	8%	5%
20 years or more	20%	20%	21%	15%	14%	20%	35%	25%
Born in Hawai'i	54%	56%	57%	57%	68%	52%	41%	55%
DK/ Rf	2%	2%	1%	3%	2%	1%	2%	-

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

Years in Hawai'i (*By Area - Hawai'i Island, Maui, & Kaua'i*)

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i	Kaua'i	North / East Kaua'i	South / West Kaua'i
Less than 10 years	14%	16%	13%	20%	12%	11%	13%	9%	0%	11%	13%	7%
10 to 19 years	9%	12%	12%	13%	12%	14%	12%	4%	8%	8%	10%	5%
20 years or more	20%	20%	19%	22%	25%	27%	24%	28%	29%	21%	20%	23%
Born in Hawai'i	54%	48%	53%	41%	49%	47%	49%	54%	58%	56%	53%	61%
DK/ Rf	2%	4%	4%	4%	2%	1%	2%	5%	5%	4%	4%	4%

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



Mahalo from the Omnitrak Group