

Resident Sentiment Survey - Spring 2023



Prepared for the:
State of Hawai'i
Department of Business, Economic Development & Tourism
July 2023
Fielded: May 5 through June 22, 2023



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Table of Contents

	<u>Page</u>
Sample Plan and Methodology	3
Key Recommendations & Takeaways	4
Executive Summary	6
Detailed Findings	22
Impact of the Visitor Industry	23
Destination Management Action Plans (Fall 2022-Spring 2023)	105
Tax Revenues for Managed Tourism (Fall 2022-Spring 2023)	127
Tourism Worth the Issues (Fall 2022-Spring 2023)	138
Tourism Management Strategies (Fall 2022-Spring 2023)	144
General Perceptions of the Visitor Industry	180
Appendix A: Island Supplement	233
Appendix B: Respondent Profile	246
Appendix C: Resident Sentiment Drivers Analysis	297

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 & Tourism.

Statewide sampling produced a total of $n = 1960$ respondents as follows:

- O'ahu: 816
- Hawai'i Island: 453
- Maui Island: 326, Moloka'i: 50, Lāna'i: 25
- Kaua'i: 290

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 24%) and online surveys (76%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: May 5 through June 22, 2023



Key Recommendations & Takeaways

Key Recommendations & Takeaways – State Overall

1 *Measures of Hawai'i Resident Sentiment have stabilized, though below historic levels:* After an extended period of weakening, which started in the early 2010's, Hawai'i Resident Sentiment towards tourism has leveled off since Spring 2022. As of Spring 2023, most key high-level indicators show minimal movement, relative to indicators from the prior 6-months/12-months.

Key Resident Sentiment Tracking Statements

Mean Scores	Spring 2021	Fall 2021	Spring 2022	Fall 2022	Spring 2023
Tourism has brought more benefits than problems	5.87	5.67	5.94 ↑	6.05	5.92
Perceived impact of tourism on you and your family	5.91	6.01	6.02	6.21	6.10
Tourism is being better managed on my island	5.06	5.06	5.33	5.44	5.34
Tourism should be actively encouraged on my Island	6.07	5.87	6.10 ↑	6.07	6.07
My island is run for tourists at expense of local people	6.78	6.98	6.93	6.92	6.87

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

2 *Awareness of destination stewardship initiatives strengthens Resident Sentiment.* Nearly six-out-of-ten (59%) Hawai'i residents are aware that the Hawai'i Tourism Authority is working on destination stewardship initiatives. Residents who are aware of these initiatives are significantly more apt to feel that such efforts are working, and that the balance between tourism's positives and negatives weigh more toward the positive side.

3 *However, the perceived balance of tourism's benefits vs. challenges is shifting:* Perceptions that *Tourism has brought more benefits than problems* declined as the perceived challenges of tourism increased and perceived benefits of tourism held steady. As of Spring 2023, just more than half (52%) believe that tourism has brought more benefits than problems, a decrease from 57 percent in Fall 2022. While measures related to tourism's economic and quality of life benefits remain unchanged, perceptions of the industry as one that contributes to damage to the environment, overcrowding and higher cost of living have grown.

		Spring 2022	Fall 2022	Spring 2023
Tourism Benefits	Creates jobs for residents	7.6	7.4	7.4
(Mean Scores)	Enhances residents' quality of life	5.4	5.5	5.4
Tourism Challenges	Damage to the environment	67%	71%	75% ↑
(% reporting)	Overcrowding	69%	73%	74%
	Higher cost of living	62%	70%	73% ↑

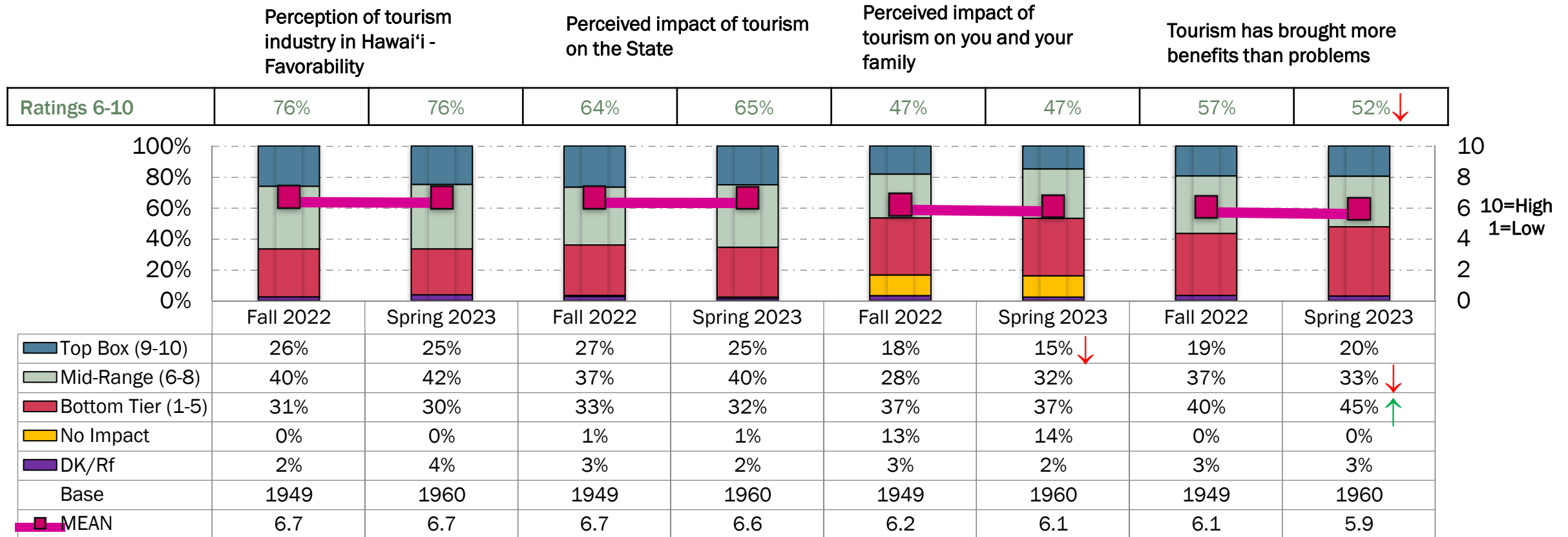
4 *Perceived challenges of tourism extend beyond HTA's direct areas of authority.* As the perceived challenges of tourism extend beyond HTA's direct area of authority, addressing these areas will require an integrated effort between multiple public and private sector organizations. Moving forward, the integrated effort should align with the top drivers of Resident Sentiment, including: Economic/quality of life benefits of tourism and destination stewardship efforts (74%), negative impacts of tourism (10%), and providing residents a voice in tourism development (6%).



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

High-level key indicators of Hawai'i resident sentiment towards tourism have largely stabilized in Spring 2023, though at a level below historic levels. Across all major indicators, resident sentiment displayed only minor fluctuations during this period. However, perceptions of *Tourism bringing more benefits than problems* declined as perceived problems of tourism increased and perceived benefits of tourism held steady.



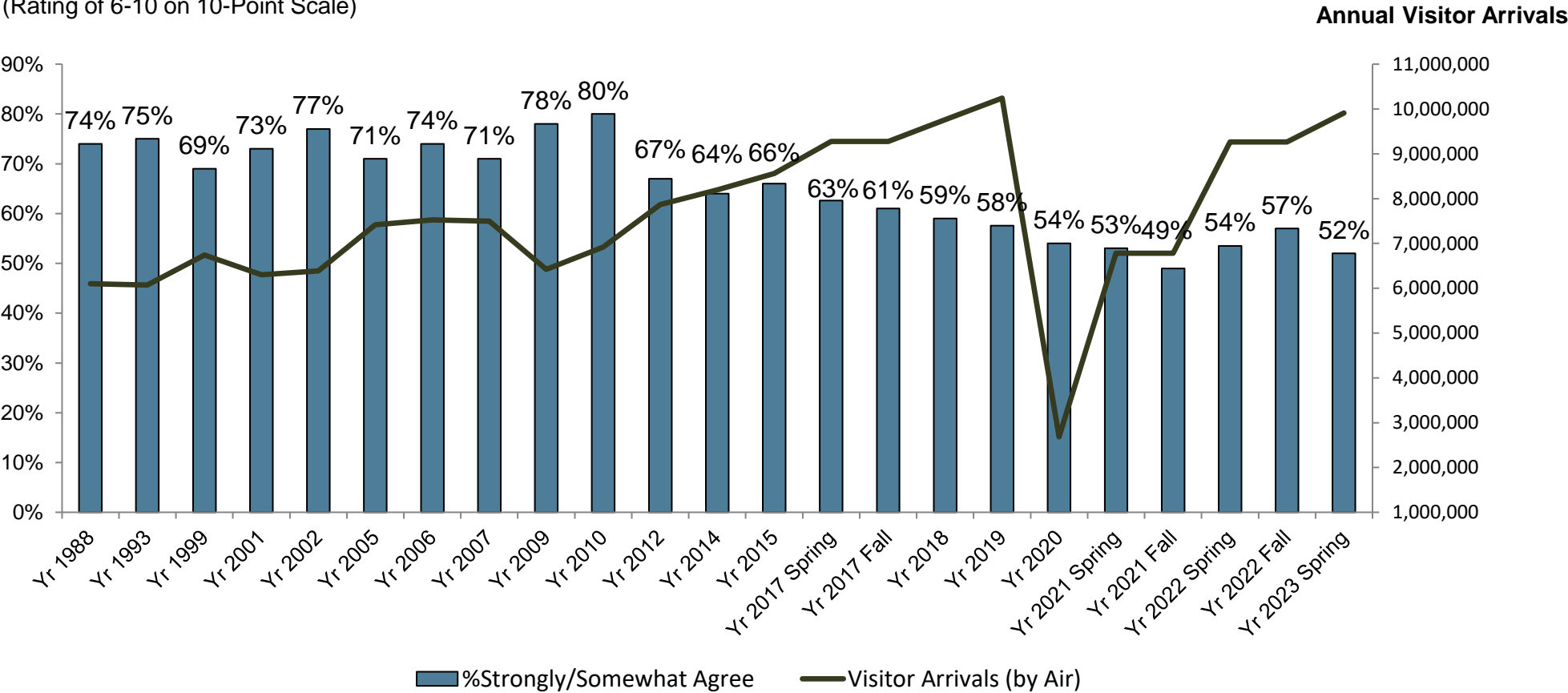
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

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

“Tourism has brought more benefits than problems” dipped in Spring 2023

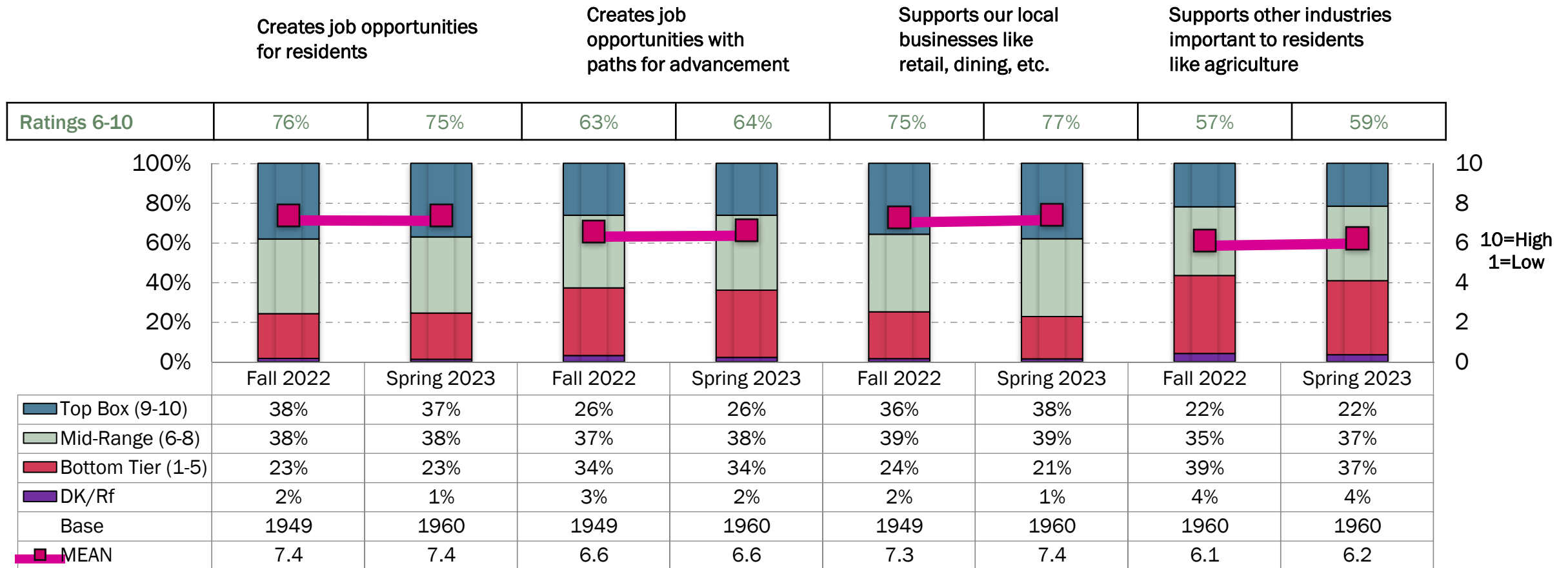
% strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-10 on 10-Point Scale)



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

Executive Summary – Economic Impact Indicators

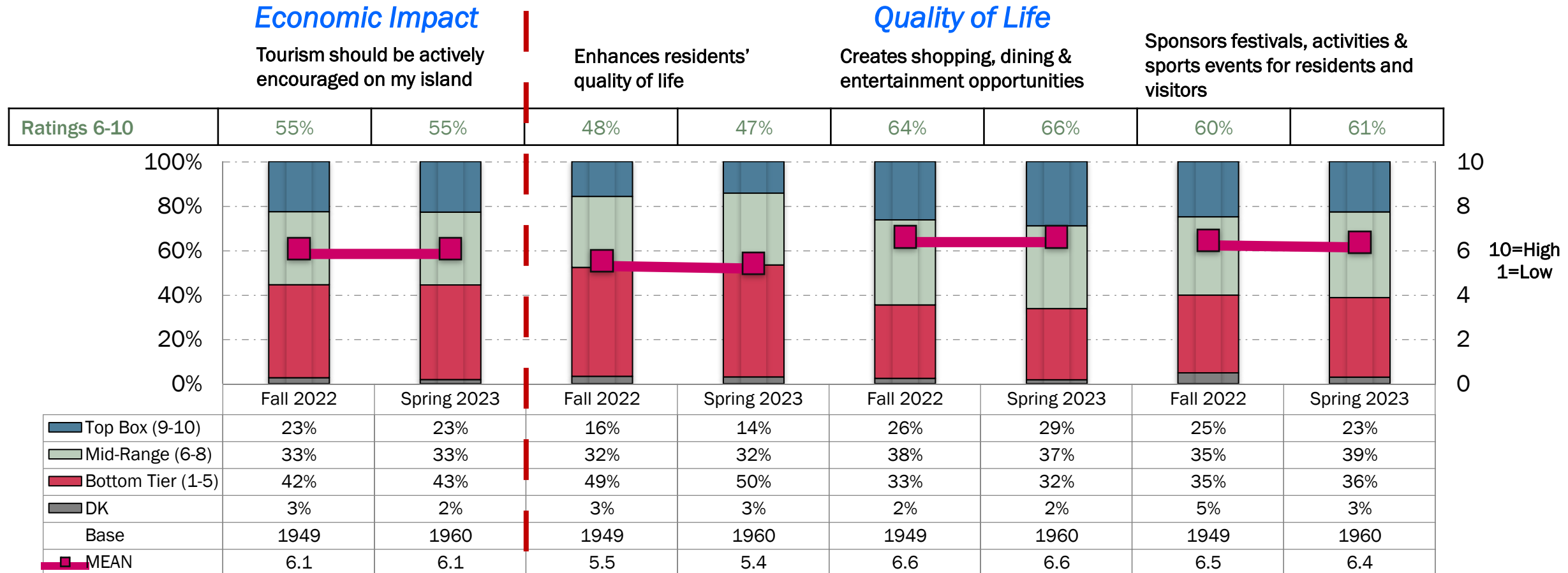
Economic impact indicators are holding steady with prior ratings, reporting positive perceptions regarding the contribution of tourism to job creation for residents and opportunities for advancement. Additionally, the industry's beneficial spillover effects into local businesses and other sectors like agriculture continue to be acknowledged.



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

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

Tourism's impact on Quality of life also remains stable. Residents remain divided on the issue that *Tourism enhances resident quality of life* and remain more upbeat that it *Creates shopping/dining/entertainment opportunities* and *Sponsors festivals/activities/sports events*.



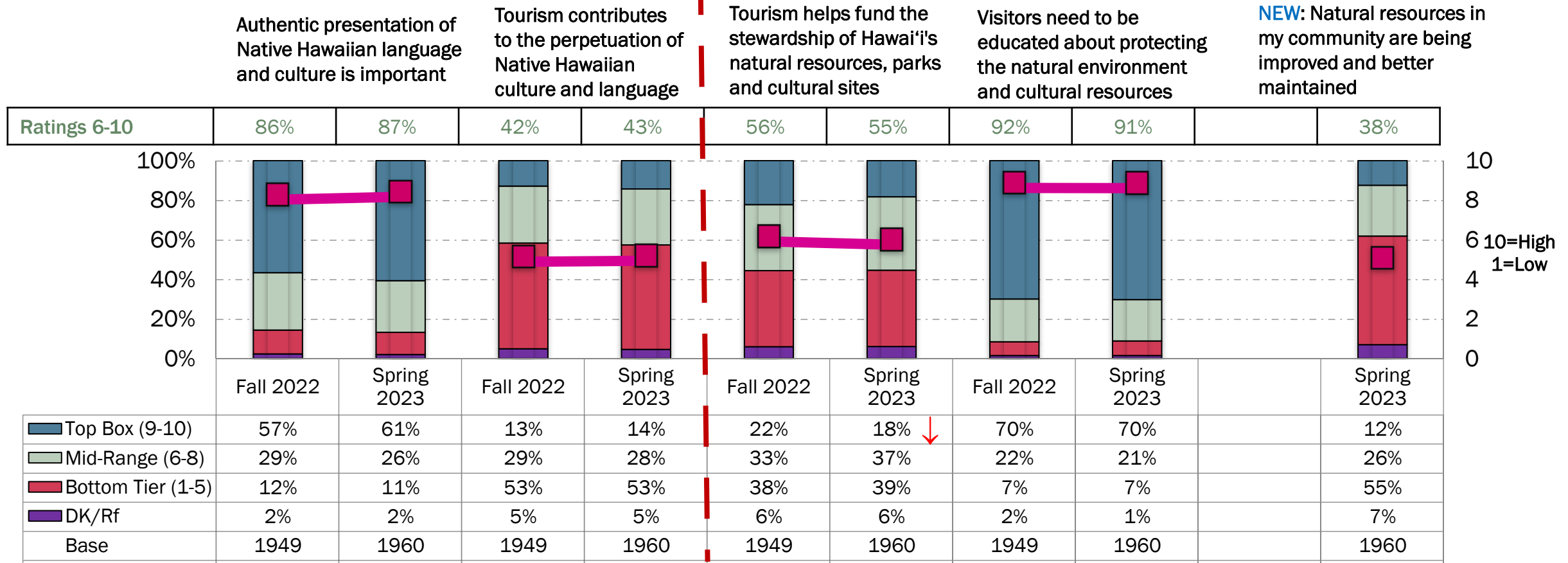
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Executive Summary – Native Hawaiian Cultural & Sustainability Indicators

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

Native Hawaiian Cultural Indicators

Sustainability and Natural Resources

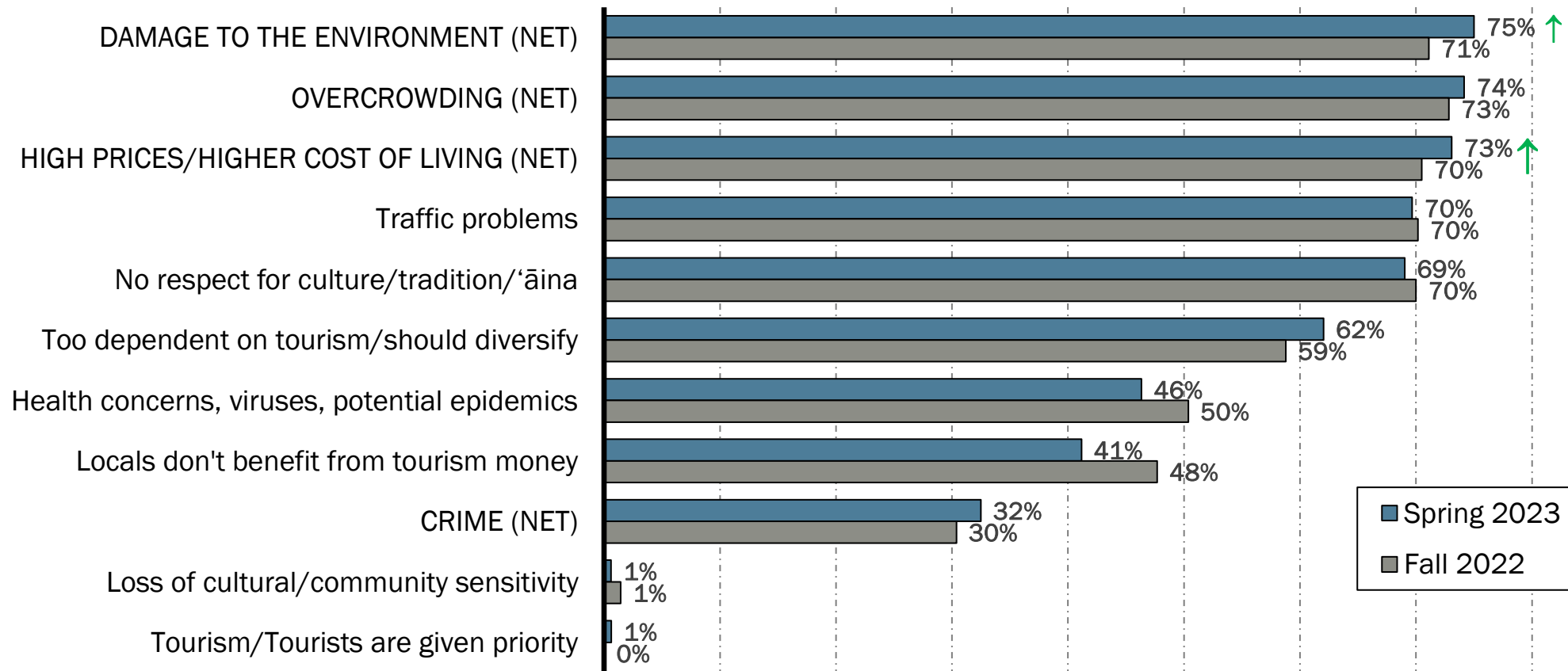


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Problems Created by Tourism in Hawai'i (Trends Fall 2022 – Spring 2023)

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

Among residents who say that the benefits of tourism do not outweigh the problems, the top perceived problems created by tourism are *Damage to the environment* (75%), *Overcrowding* (74%) and *High prices/higher cost of living* (73%), each of which increased from Fall 2022 levels.



Opportunities for Improving Opinion of Tourism (Spring 2023)

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

Among residents who did not express a favorable opinion of tourism in Hawai'i, the top actions cited for improving their opinions are *Managing/controlling/capping tourism* (22%), *Addressing visitors' lack of respect for locals/culture/āina* (14%) and *Educating tourists regarding the state's land and people* (10%).



Base: Spring 2023 (623)

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

Executive Summary – Balance: Negative Impacts/Managed Tourism

Apart from specific perceived problems created by tourism, the number of residents who thought their *Island is run for tourists at the expense of local people* (67%) and that their *Island economy is too dependent on tourism* (82%) held relatively steady with Fall 2022 levels. Residents' assessment of managed tourism measures, such as efforts to balance economic benefits with quality of life, tourism being better managed on their island, and their ability to have a voice in tourism matters, held relatively steady as well.

Negative Impacts

Island is run for tourists at expense of local people

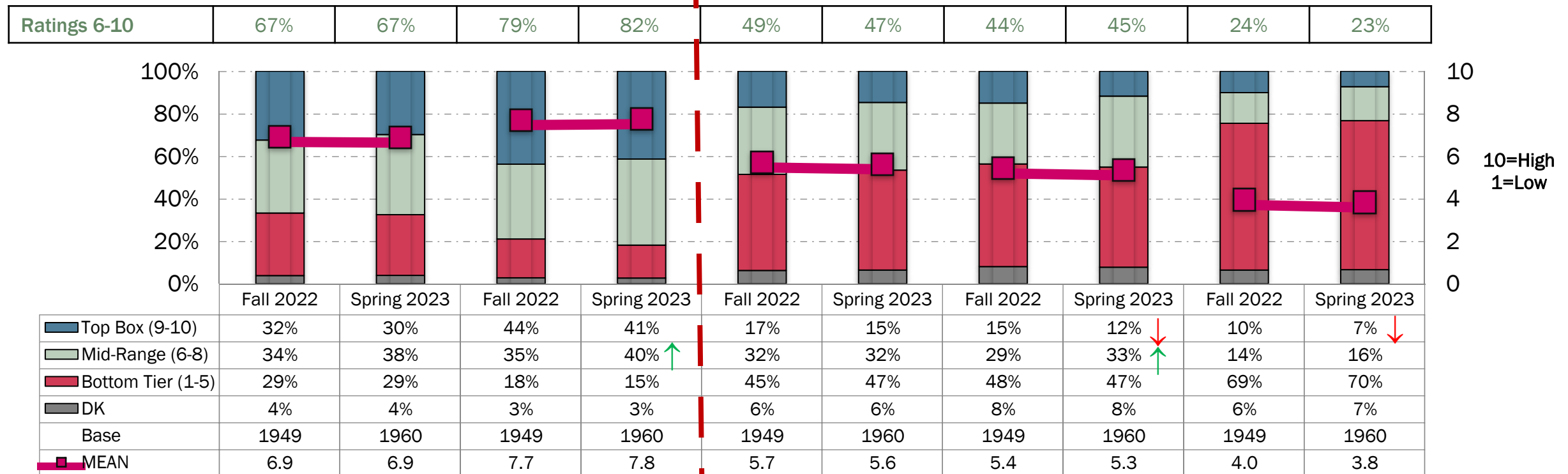
Island economy is too dependent on tourism

Managed Tourism

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

Tourism is being better managed on my island

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



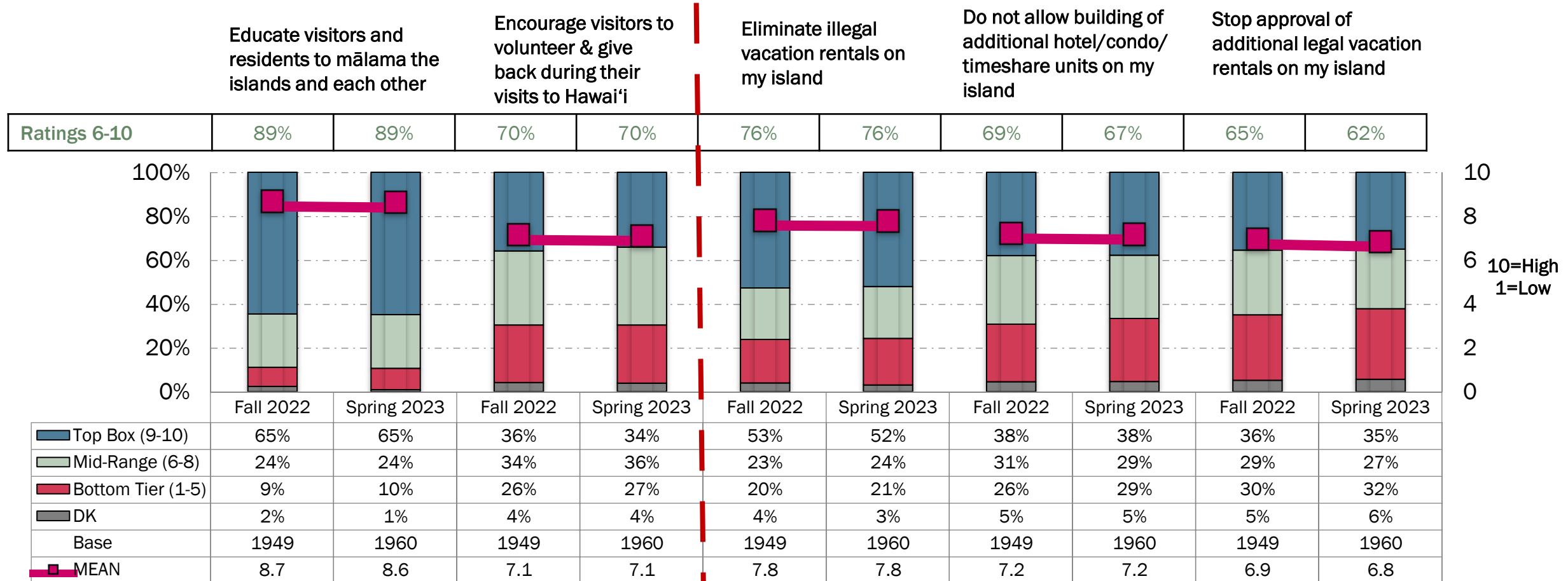
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary - Importance of Select Managed Tourism Strategies

Consistent with residents' concerns about overcrowding and respect for locals/culture/‘āina, perceptions of the importance of specific Regenerative- and Accommodations-related strategies to manage tourism continued relatively unchanged from Fall 2022 ratings.

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?

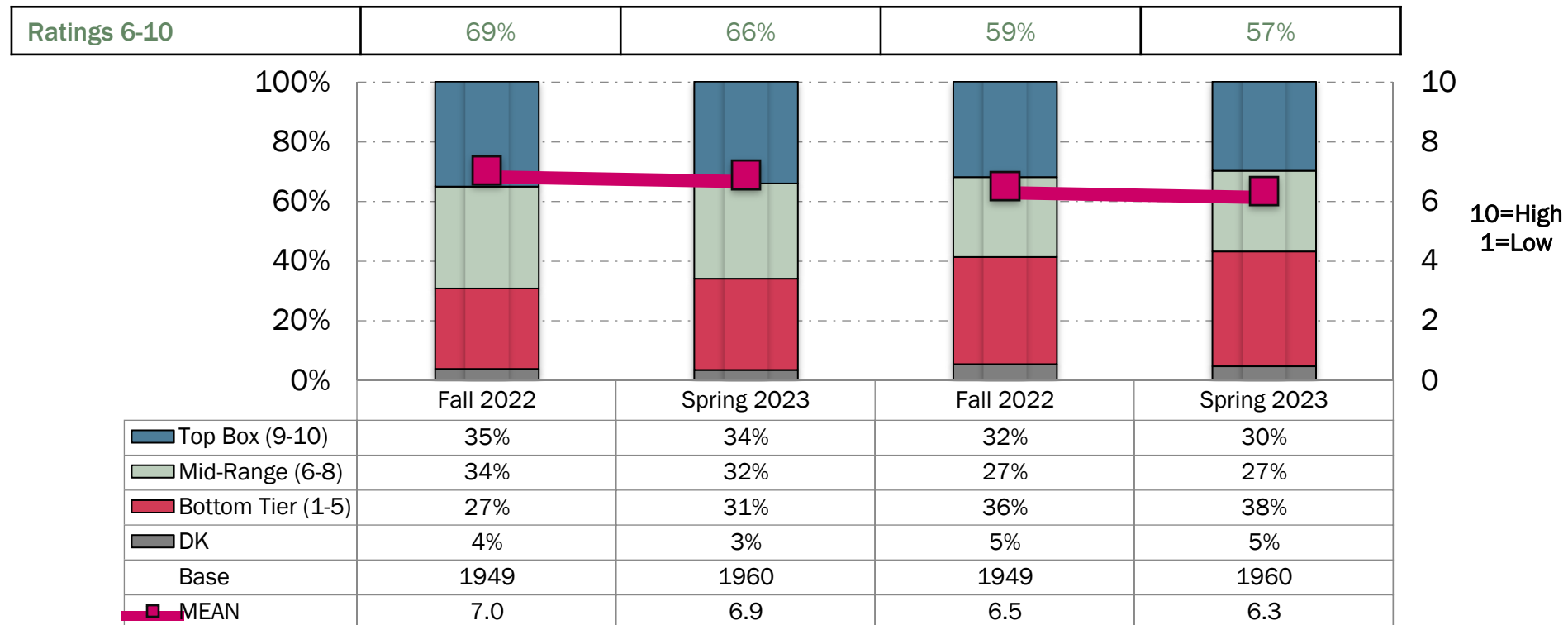
Executive Summary - Importance of Select Managed Tourism Strategies (continued)

Consistent with residents' concerns about overcrowding and islands prioritizing visitors over locals, perceptions of the importance of specific Access-related strategies to manage tourism continued relatively unchanged from Fall 2022 ratings.

Access

Charge visitor access fees to state parks and trails

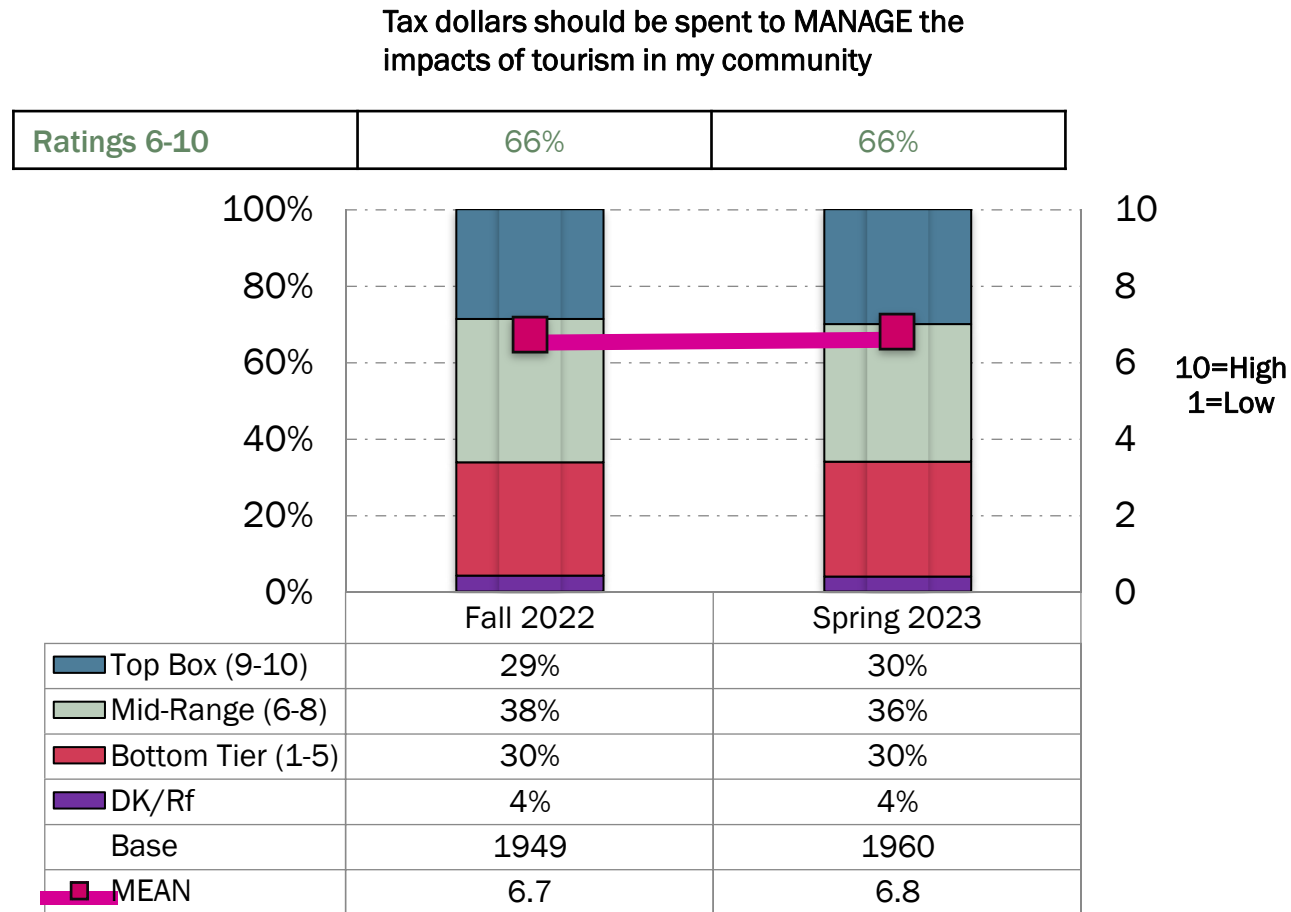
Designate resident-only days of the week at some state parks, beaches and trails



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 – Tax Dollars Should be Spent to Manage Tourism

Similarly, public support for utilizing tax revenues to manage the impacts of tourism on communities continued to lean favorably. Approximately 66 percent of respondents expressed strong or somewhat agreeable opinions on this idea, while only 30 percent opposed it.

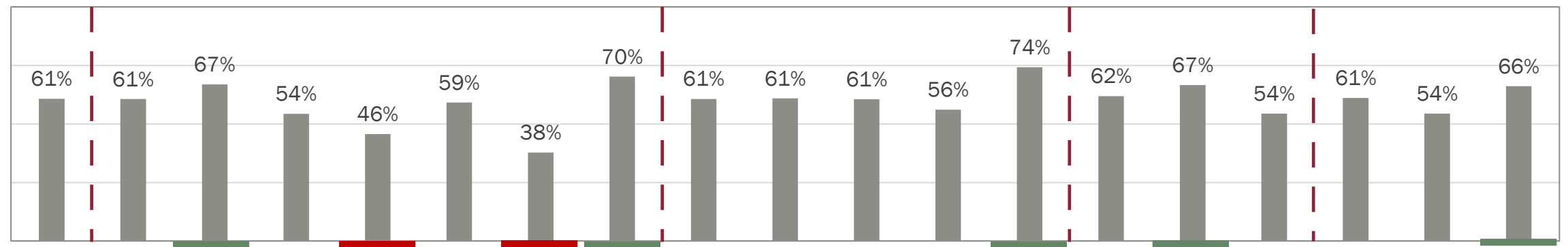


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

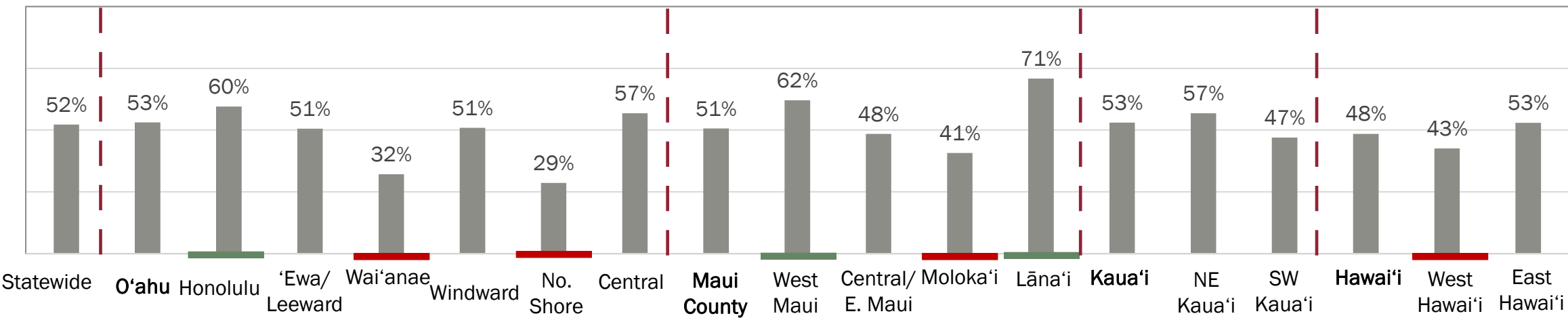
Executive Summary –Tourism is Worth the Issues, Benefits Outweigh Problems by Island/Area

At the community level, residents who were particularly critical of the perceived benefits vs. problems of tourism resided in Wai‘anae, the North Shore of O‘ahu, West Hawai‘i Island and on Moloka‘i. Sentiment was strongest among residents of Lāna‘i.

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



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



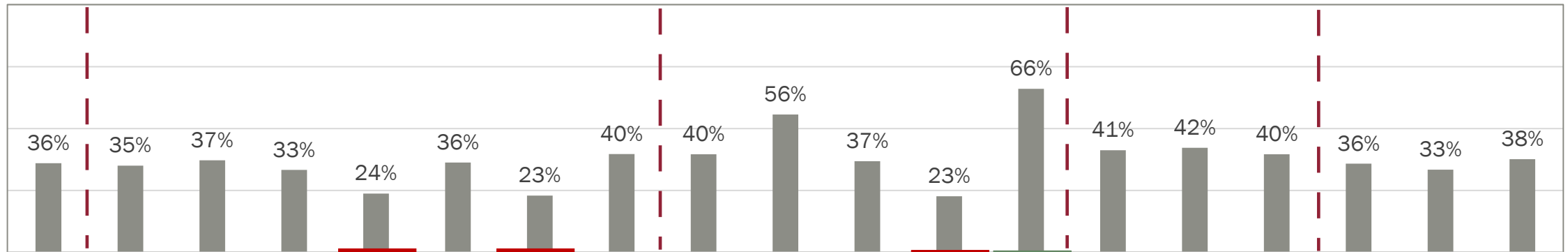
Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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.

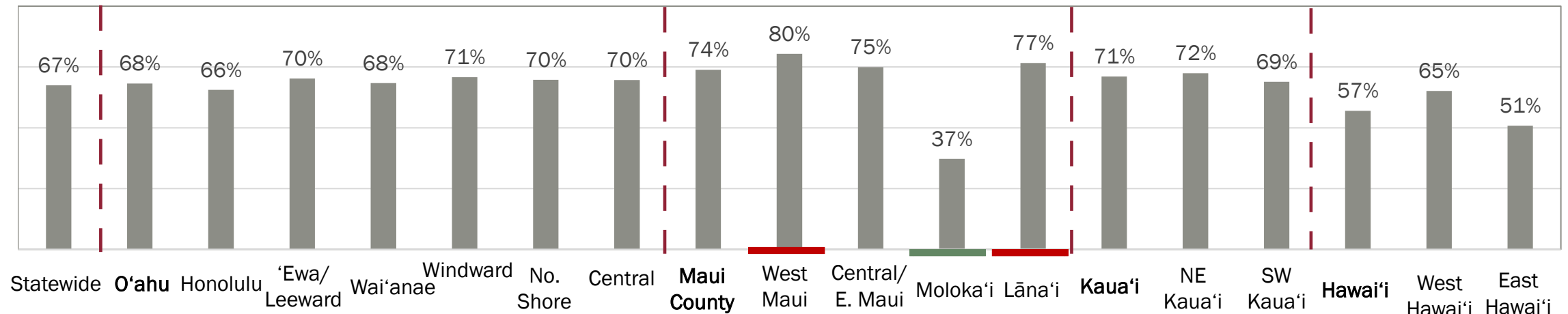
Key Indicators by Island/Area (continued)

At the community level, residents who felt most strongly about tourism being “mostly positive” on their family impact resided in West Maui and on Lānaʻi; those least likely to agree on such impact resided in Waiʻanae, the North Shore of Oʻahu and on Molokaʻi.

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



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



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

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

Awareness of HTA Destination Stewardship Initiatives

Nearly six-out-of-ten (59%) Hawai'i residents are aware that the Hawai'i Tourism Authority is working on destination stewardship initiatives. Awareness among Maui residents was the highest in the State, with 63 percent of residents aware of at least one of the HTA destination stewardship initiatives referenced in the research.

	Percent of residents aware of at least one specific HTA destination stewardship initiative	Are you aware that the HTA is working on.....? [Examples of HTA destination stewardship programs by island]		
State Overall	59%			
O'ahu	60%	Pre- and post-arrival visitor communications program	Stewardship plans for key hotspots on O'ahu	Curated experiences for residents and visitors
Hawai'i Island	54%	Preservation of culturally significant hotspots	Resources to perpetuate authentic Hawaiian culture	Plan to facilitate positive community-visitor relations
Maui Island	63%	Responsible tourism communications program	Cultural education and training programs	Regenerative tourism strategies
Moloka'i	30%	Responsible visitor behaviors communications program	Product development focused on Regenerative tourism	Enhance interisland transportation options
Lāna'i	63%	Lāna'i City promotions	Encourage meaningful day trips or stays on Lāna'i	Implement the Mālama Maui County Pledge
Kaua'i	52%	Focus policy efforts on visitor and resident behavior	Address overtourism by managing Kaua'i visitors	Local culture educational materials for visitors

Awareness of HTA Destination Stewardship Initiatives (Continued)

Nearly six-out-of-ten (59%) Hawai'i residents are aware that the Hawai'i Tourism Authority is working on destination stewardship initiatives. Residents who are aware of these destination stewardship initiatives are significantly more apt to feel that such efforts are working and that the balance between tourism's positives and negatives weigh more toward the positive side.

Awareness of
Destination
Stewardship initiatives
positively impacts
Resident Sentiment

	Mean Scores	Aware*	Unaware
Destination Stewardship	<i>Tax dollars should be spent to manage the impacts of tourism in my community</i>	7.0	6.6
	<i>Tourism is being better managed on my island</i>	5.7	4.8
	<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.0	5.1
Destination Balance	<i>Tourism has brought more benefits than problems</i>	6.2	5.5
	<i>Tourism is worth the issues associated with the industry</i>	6.8	6.3

*Note: Aware of at least one Hawai'i Tourism Authority destination stewardship initiative.
Q10A. Are you aware that the HTA is working on.....? Base: 400

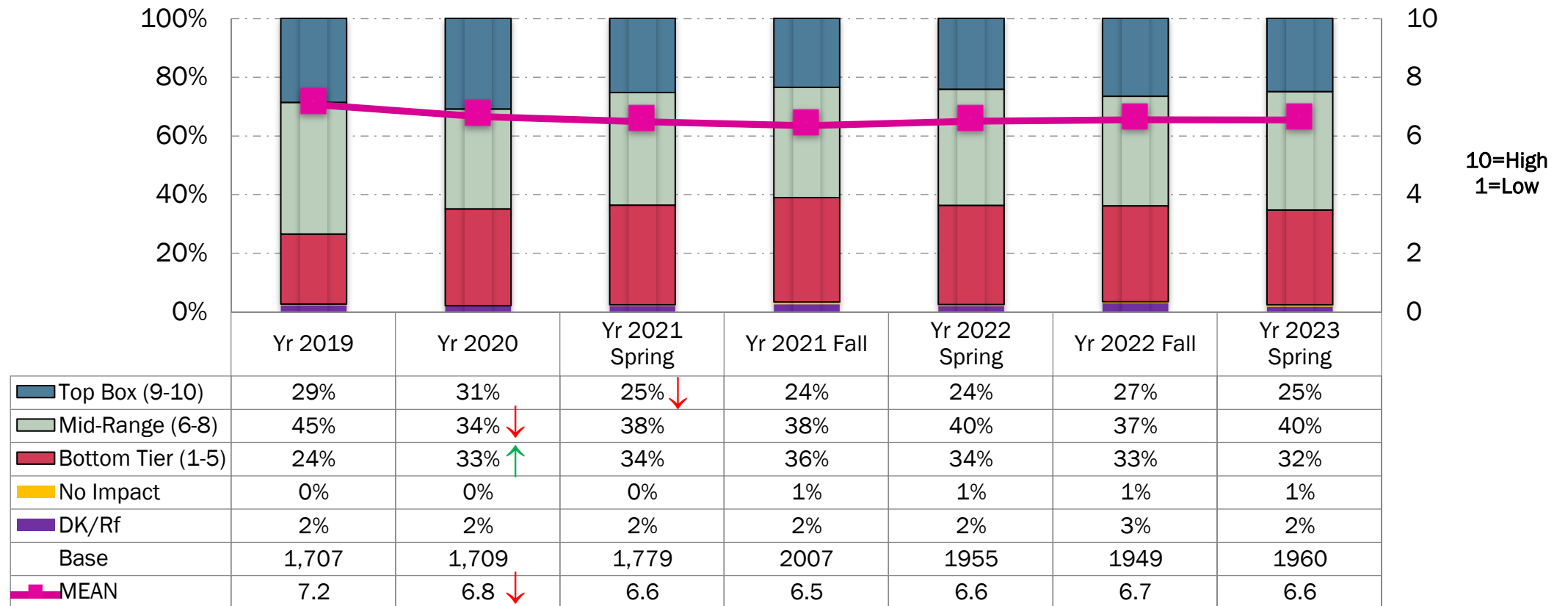


DETAILED FINDINGS



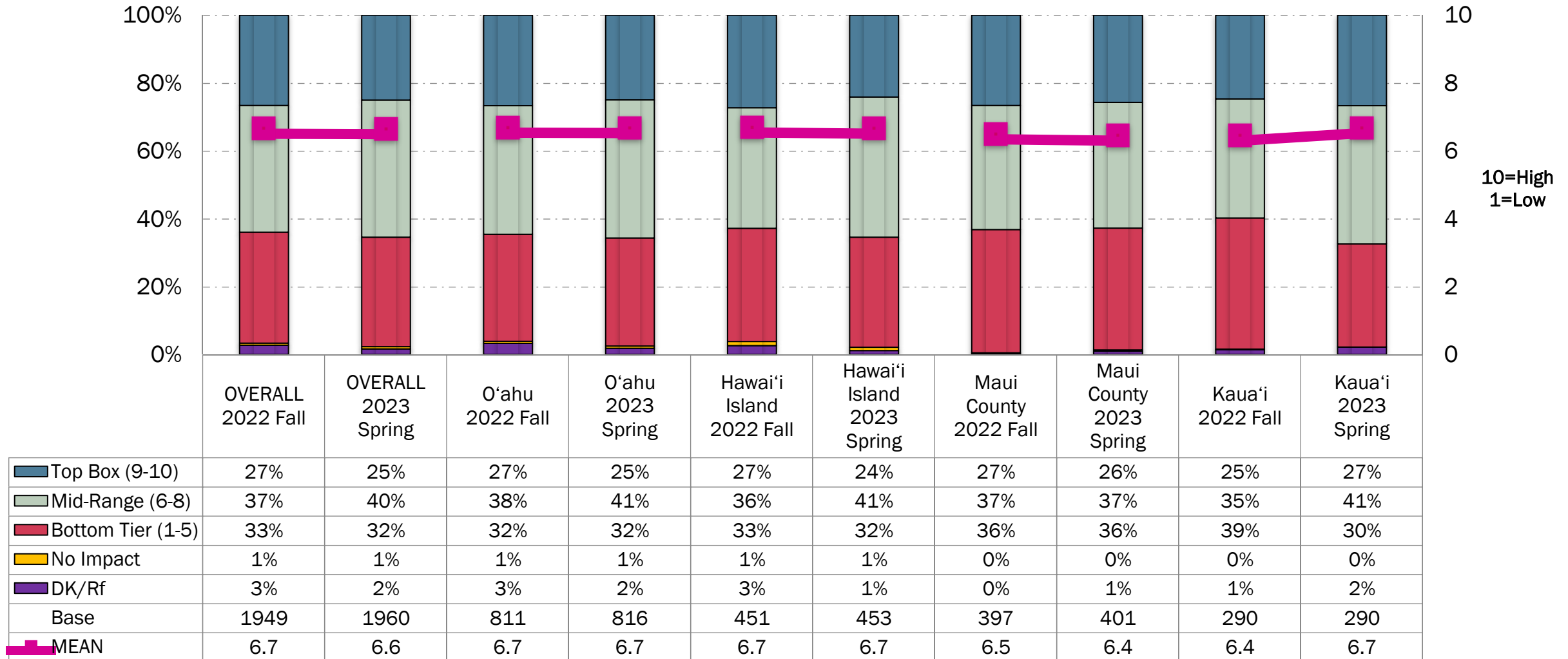
Impact of the Visitor Industry

Impact of Tourism on the State - *Overall*



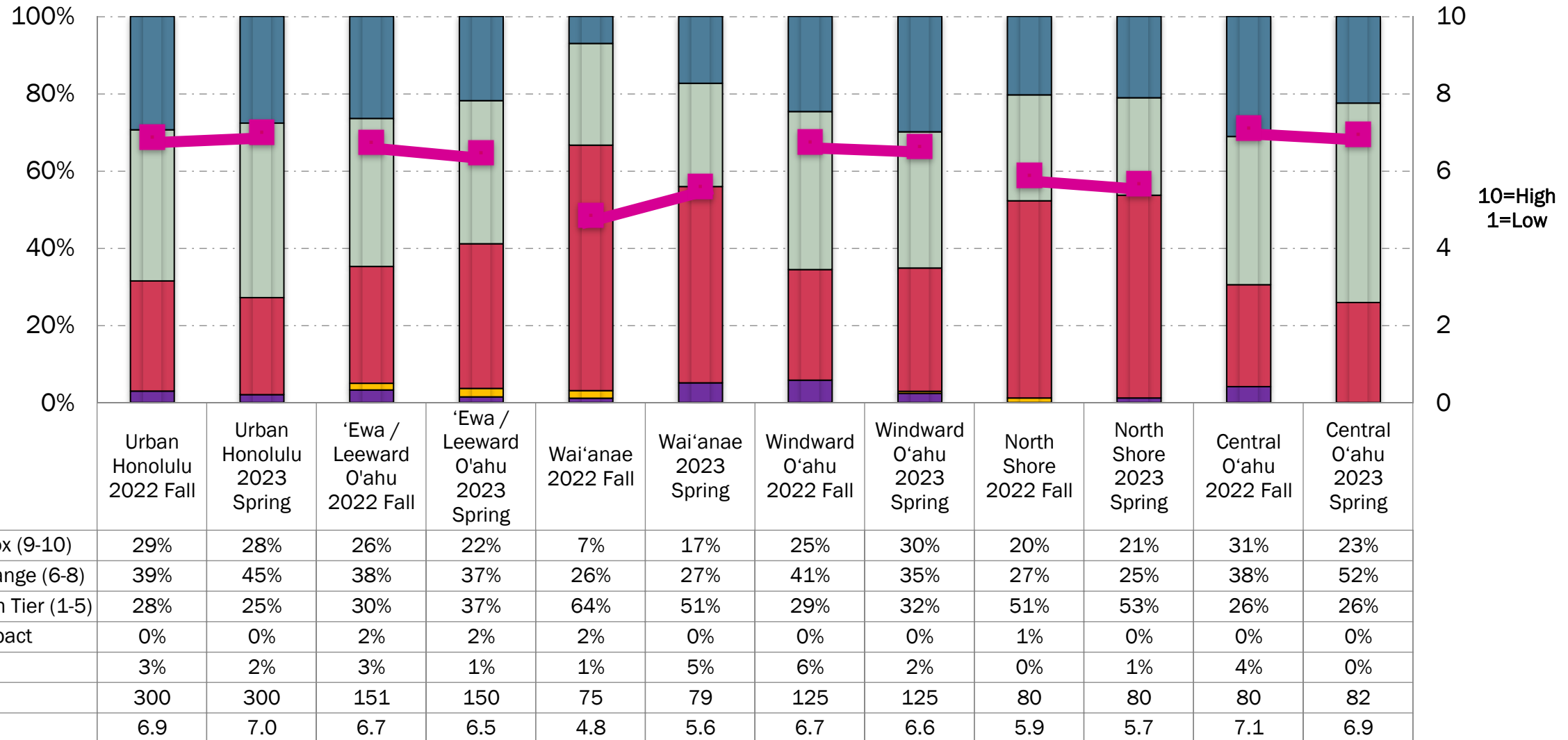
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By County*



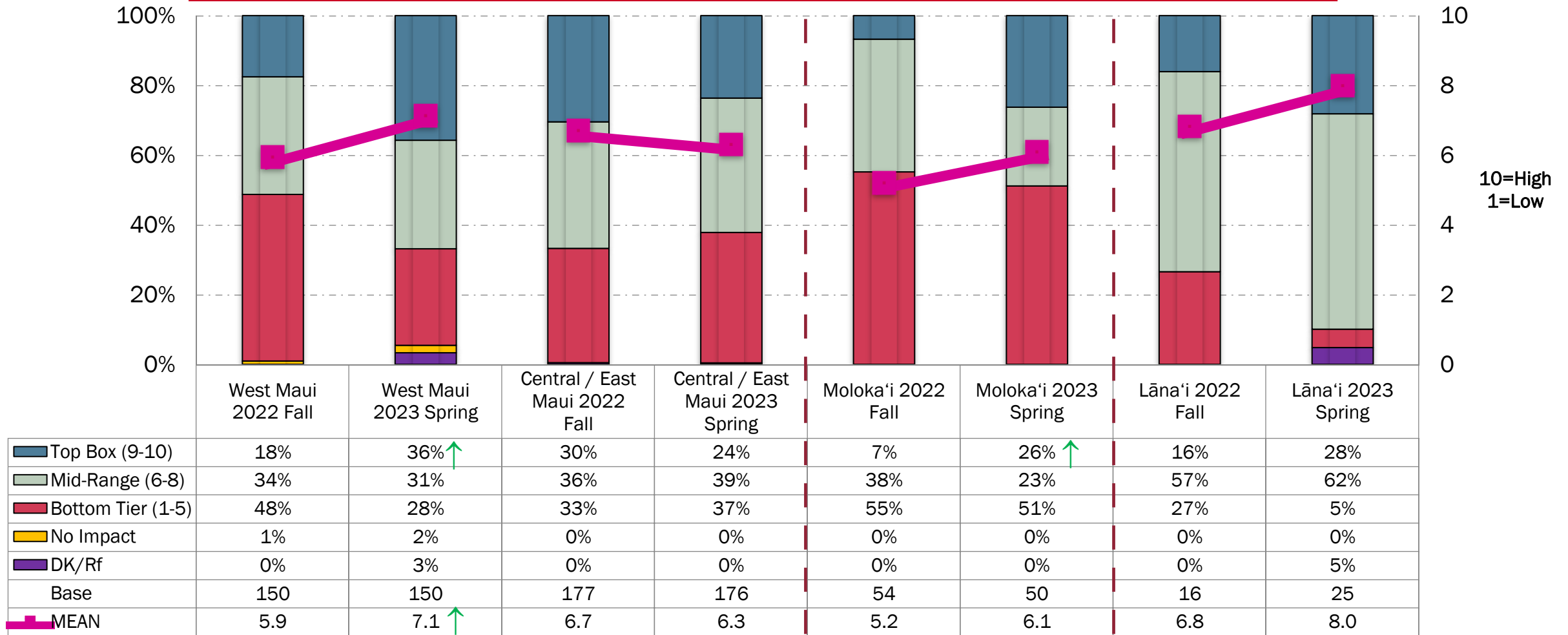
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



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

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



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



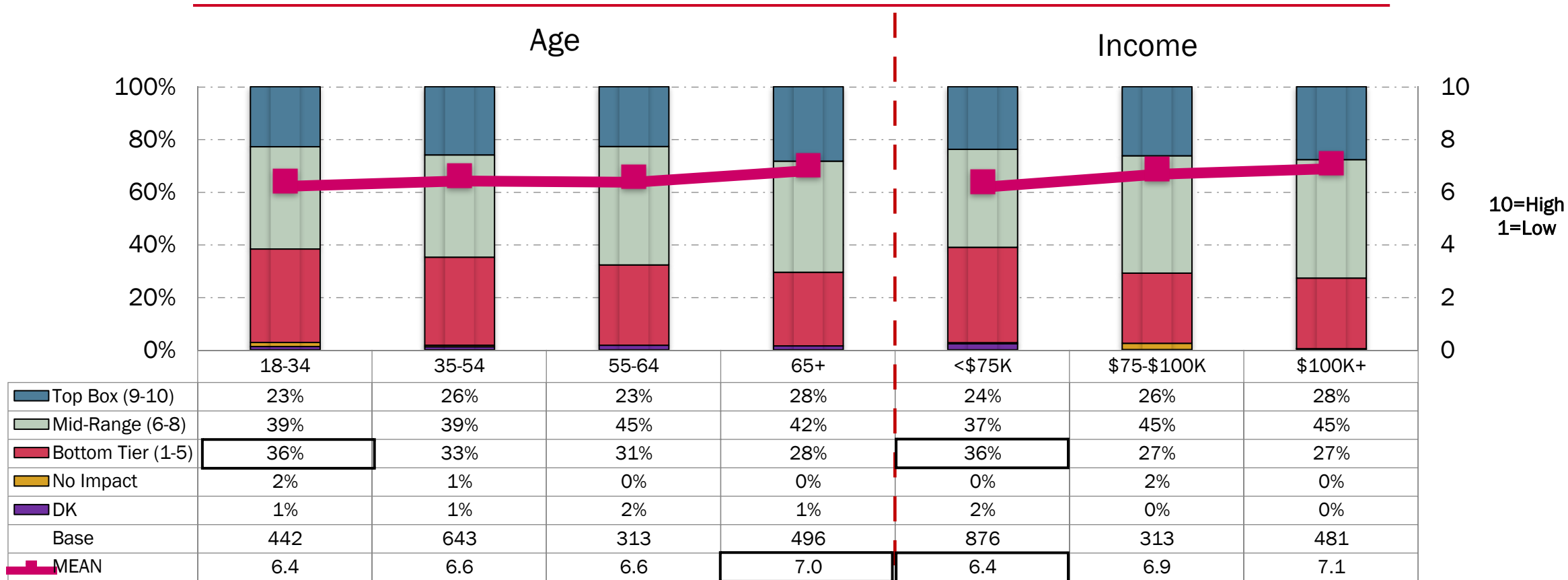
Impact of Tourism on the State –

Visitor Industry Household vs Non-Visitor Industry Household

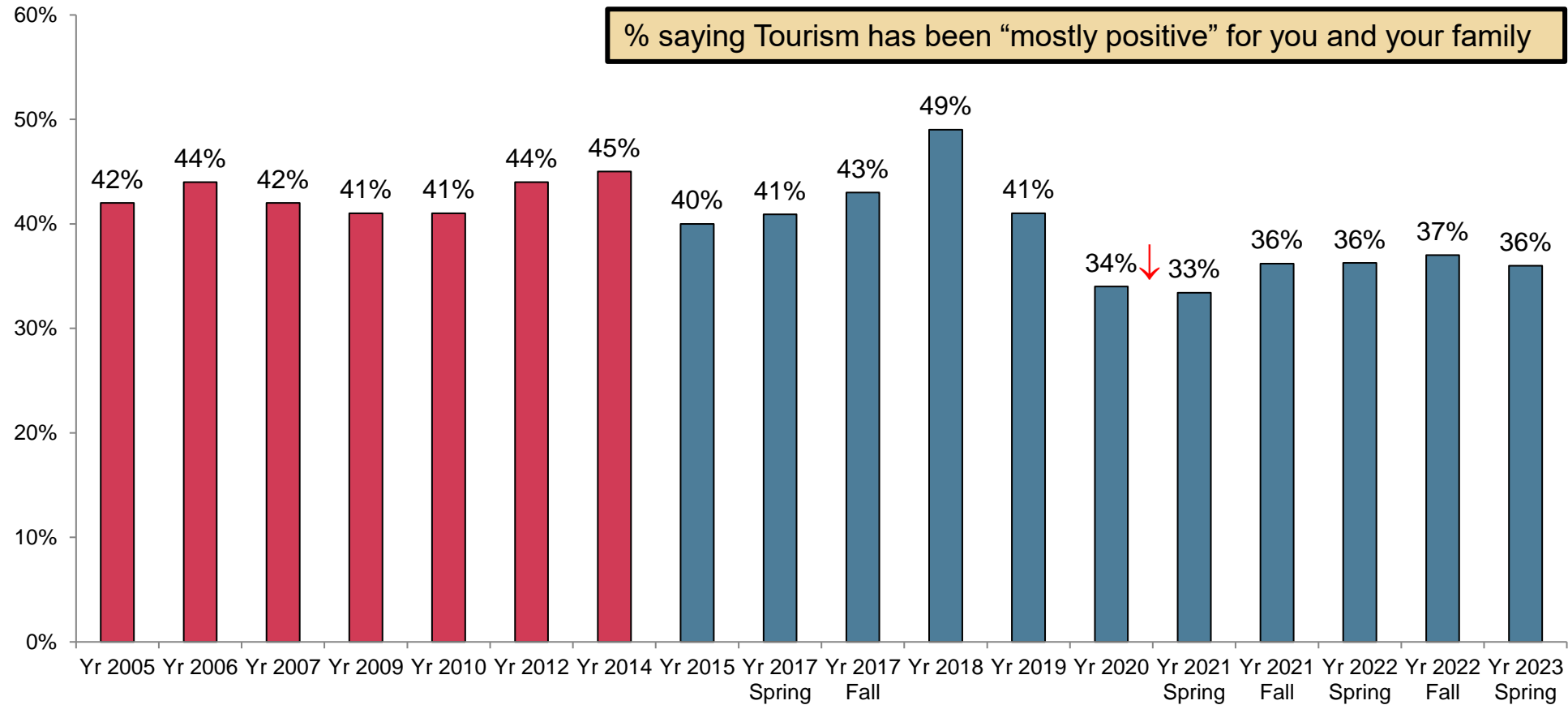


Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



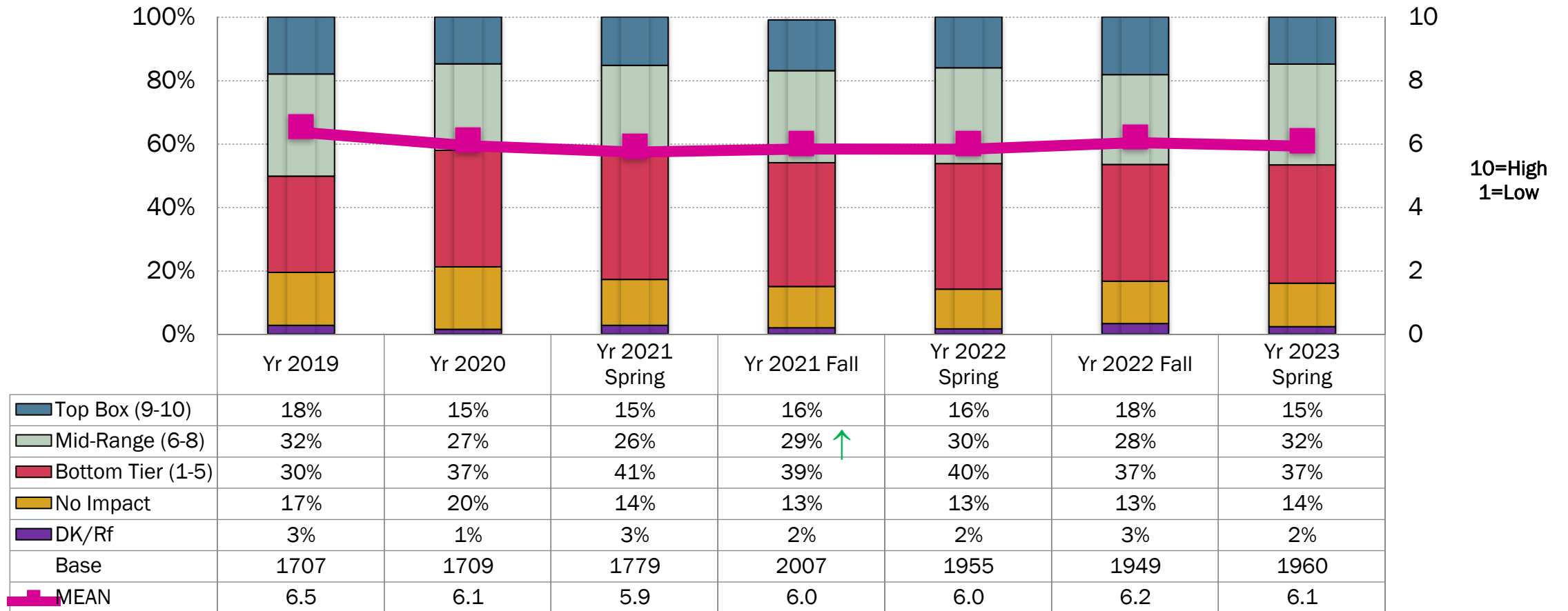
Impact of Tourism on You & Your Family – *Overall Trend*



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.

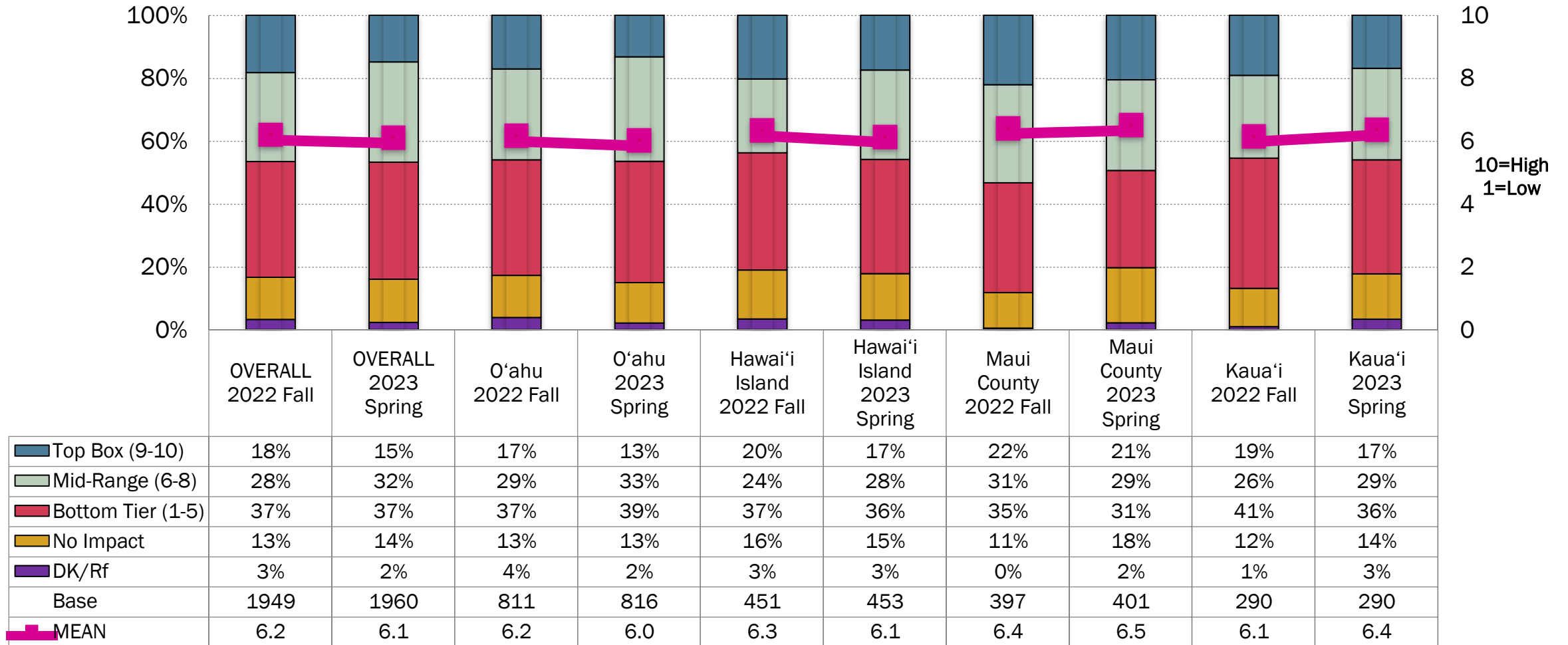
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – Overall



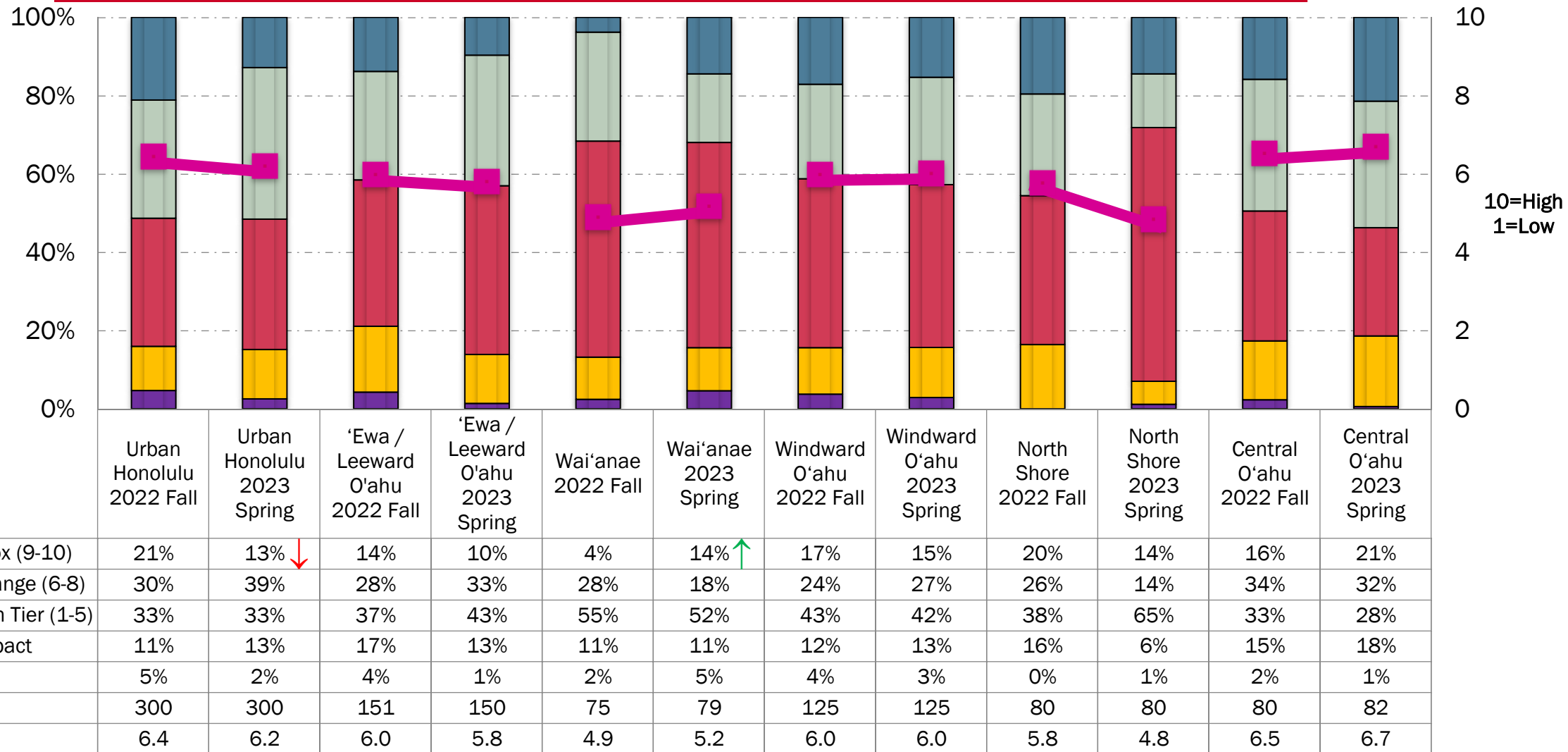
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



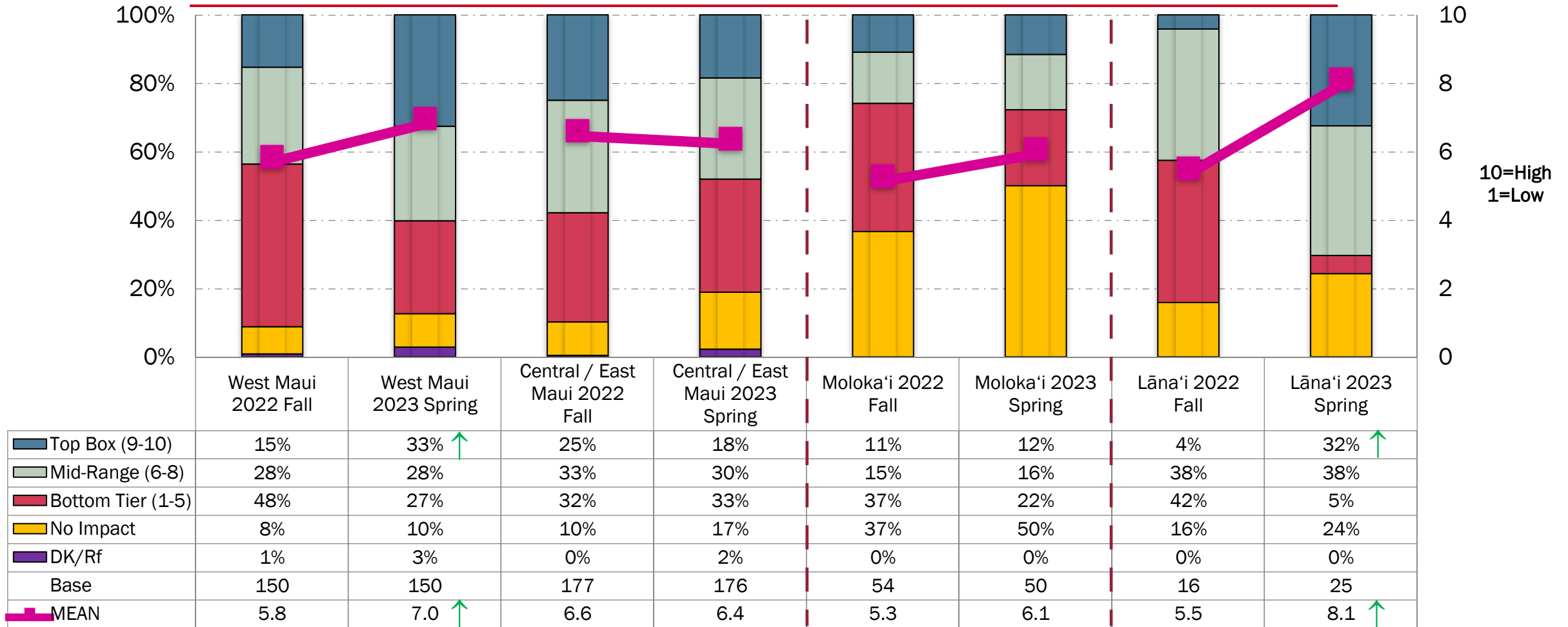
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



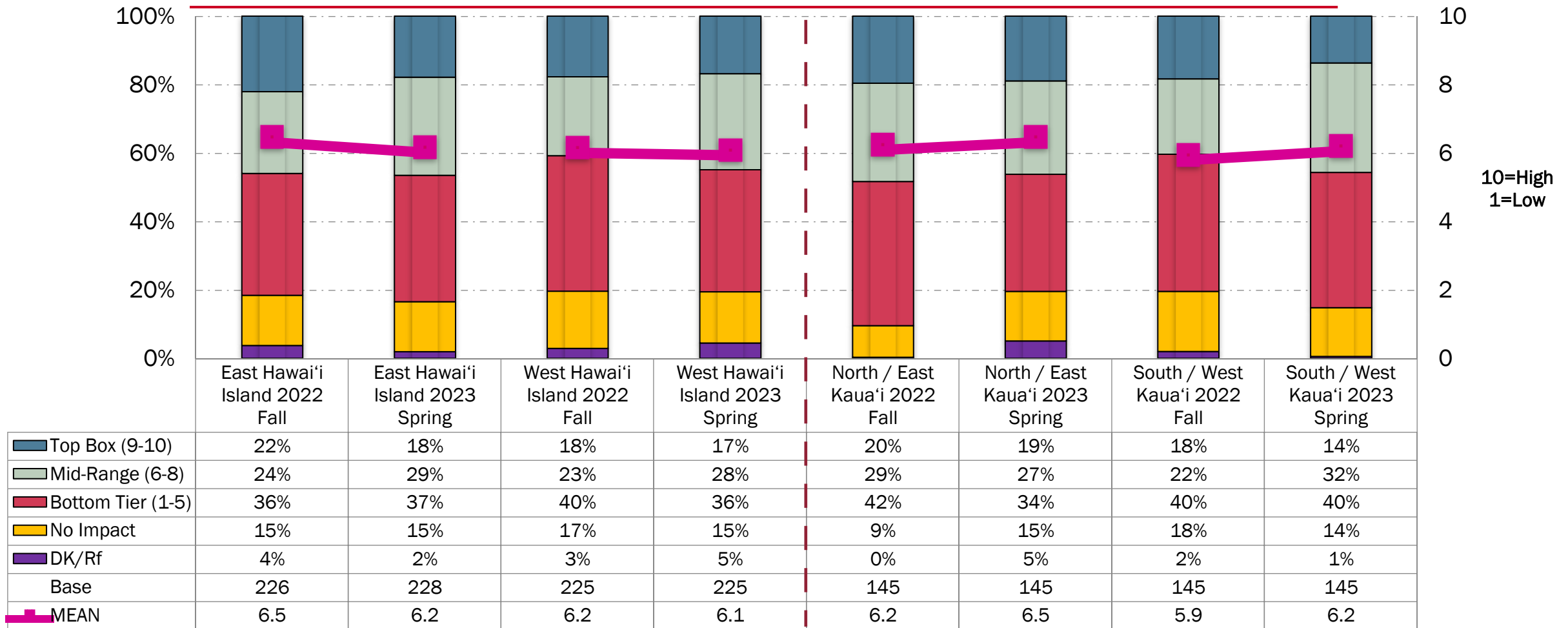
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



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

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



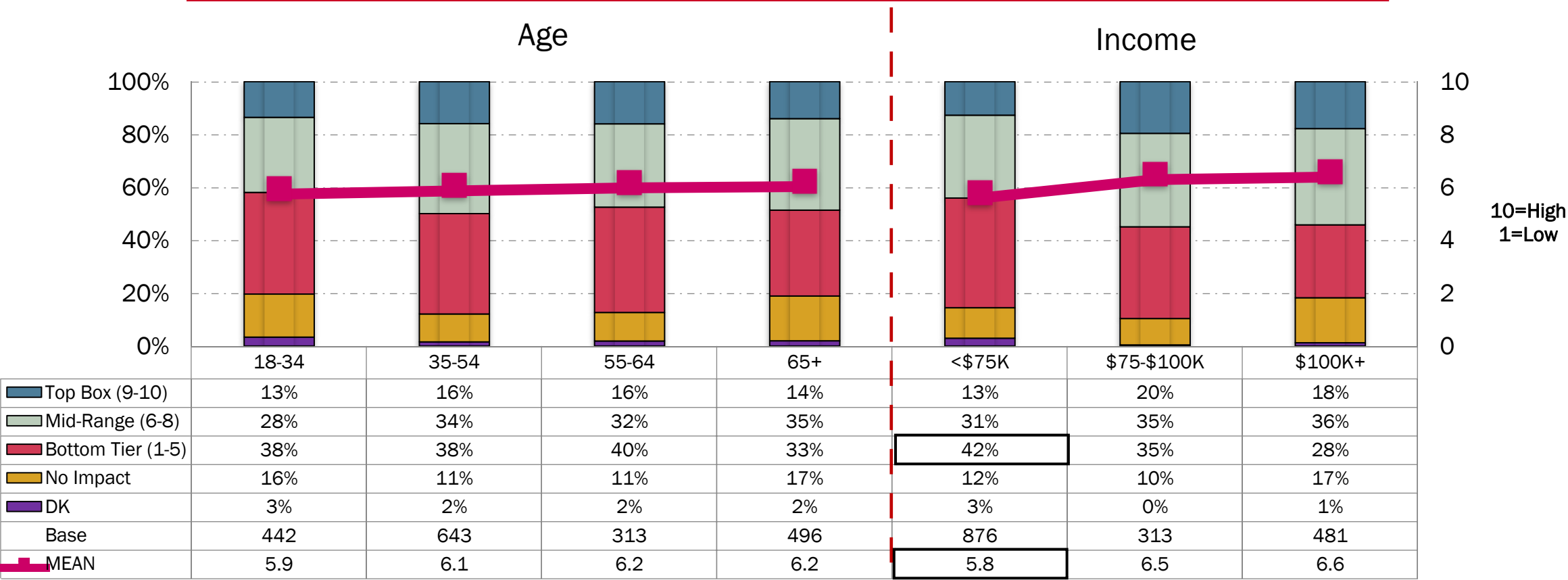
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



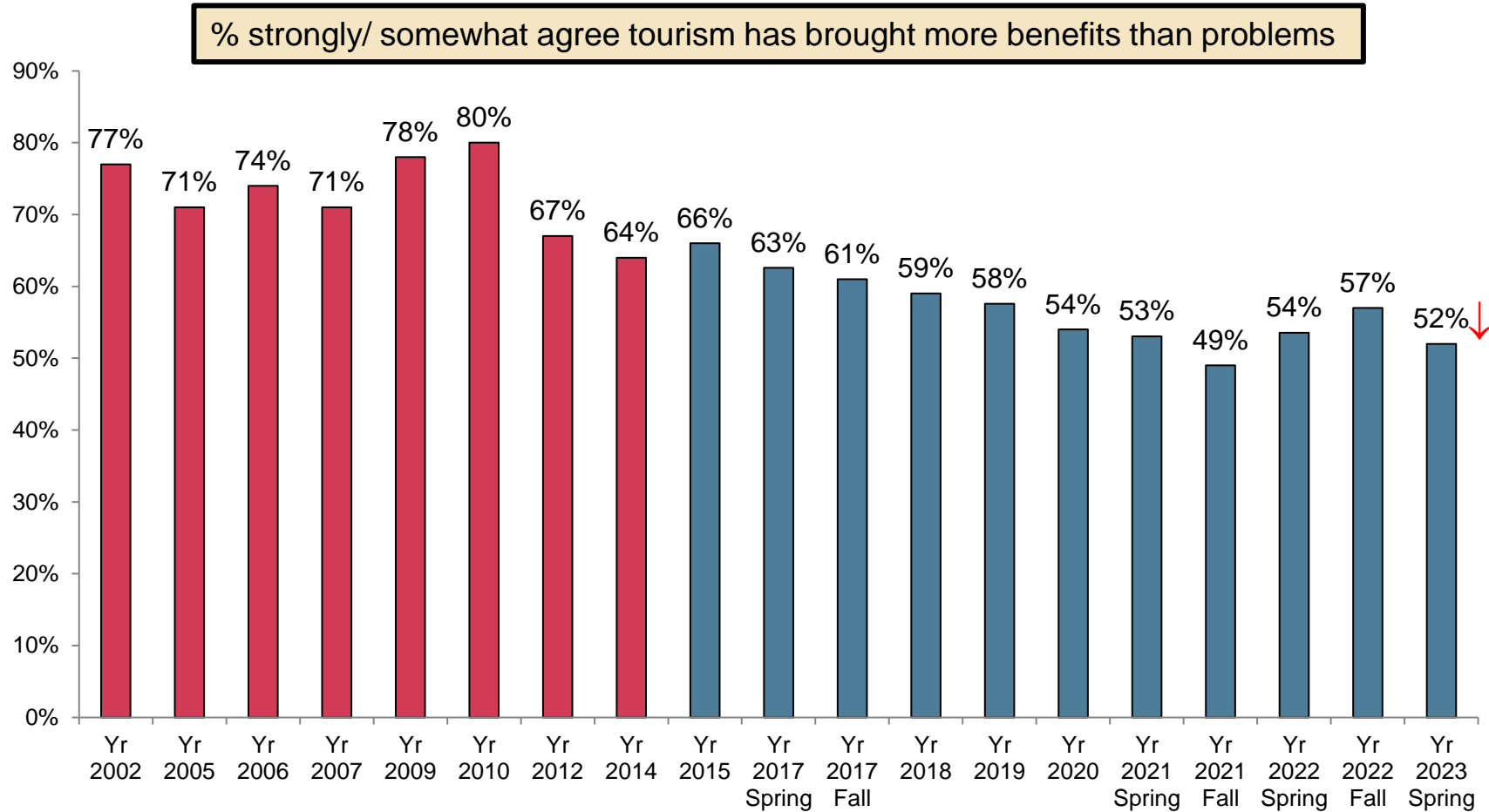
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



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

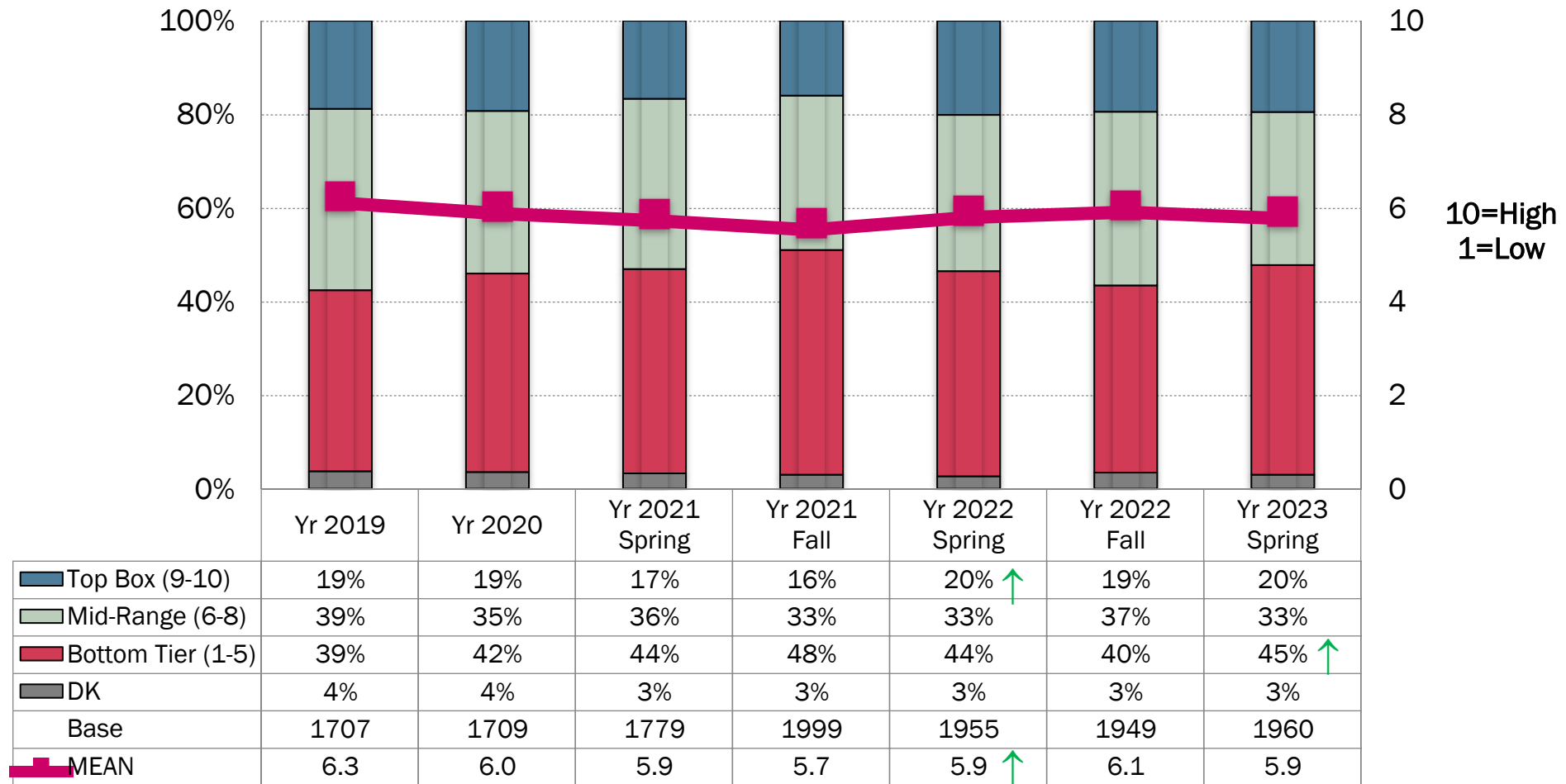
“Tourism has brought more benefits than problems” – *Overall Trend*



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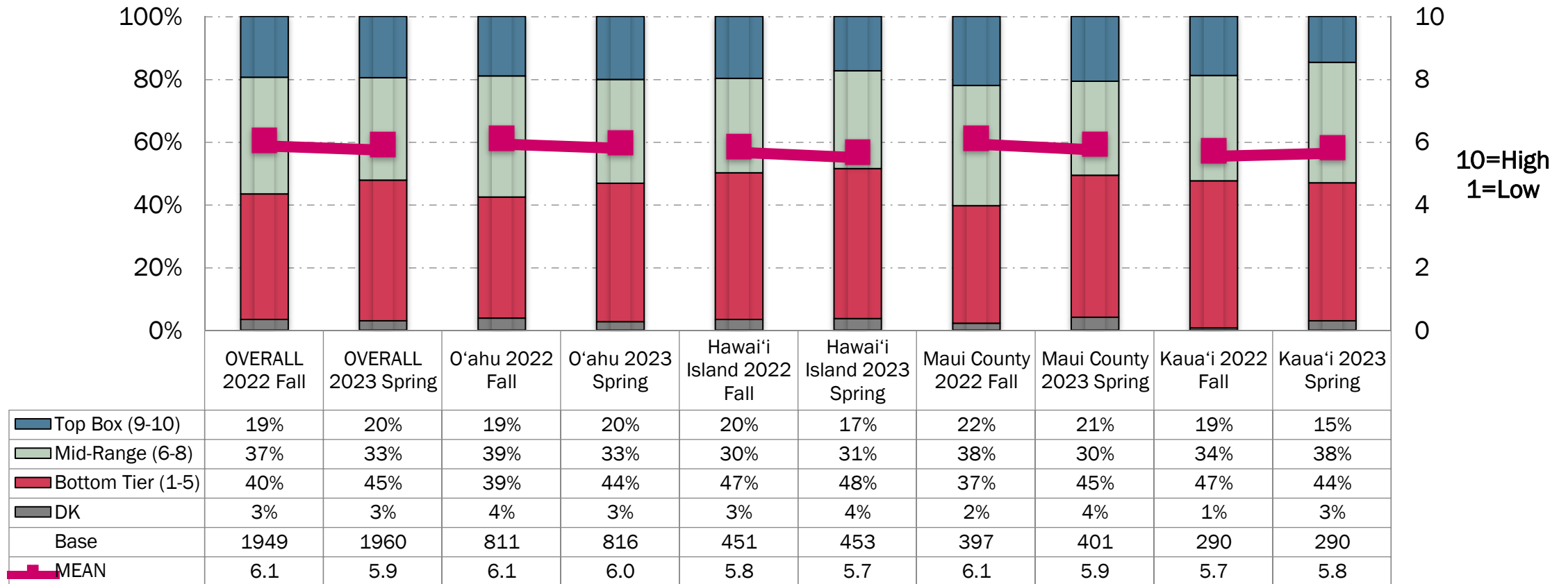
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” – Overall



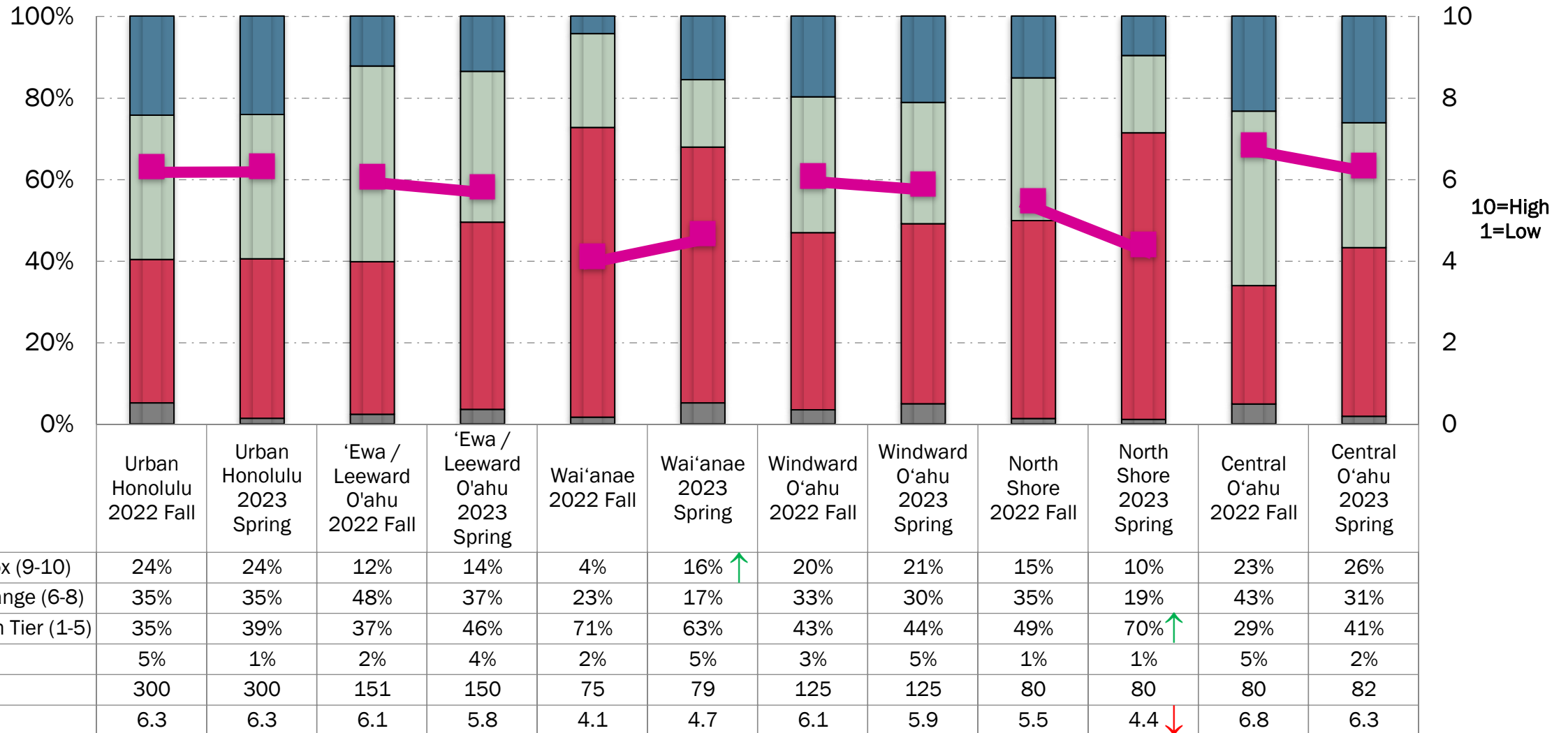
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“Tourism has brought more benefits than problems” – *By County*



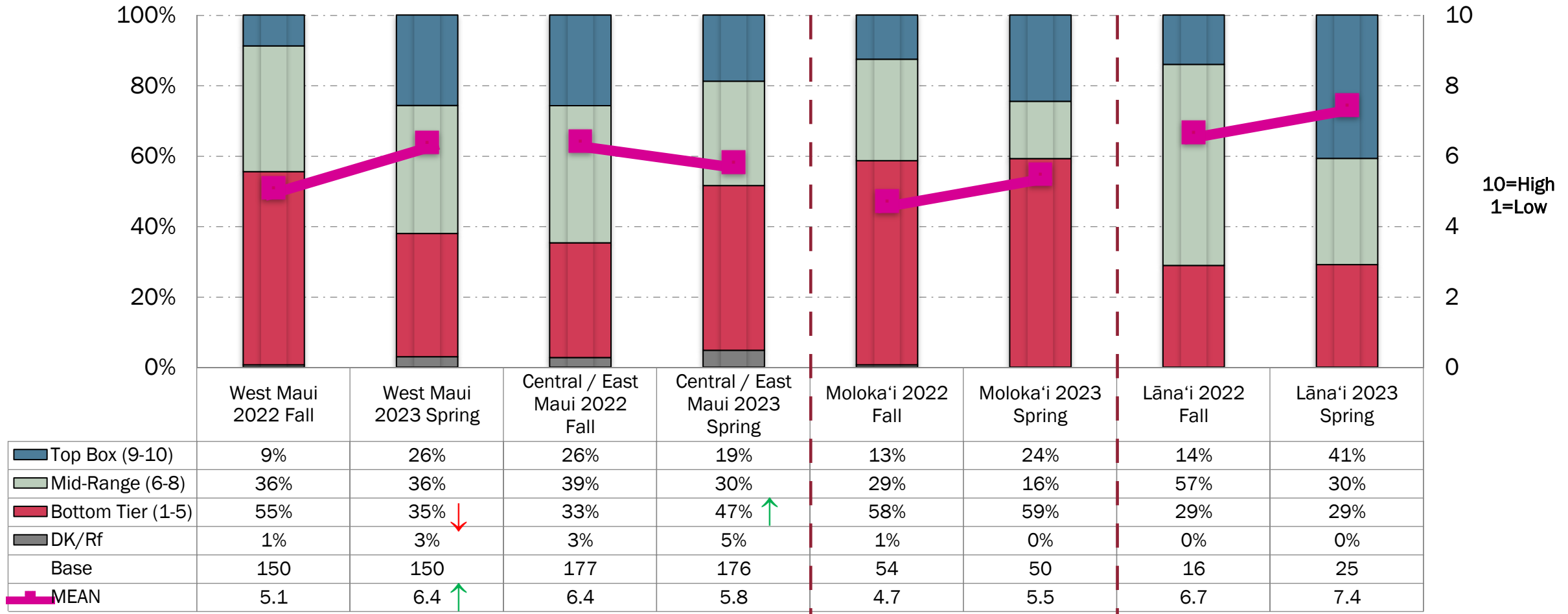
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“Tourism has brought more benefits than problems” – By Area (O‘ahu)



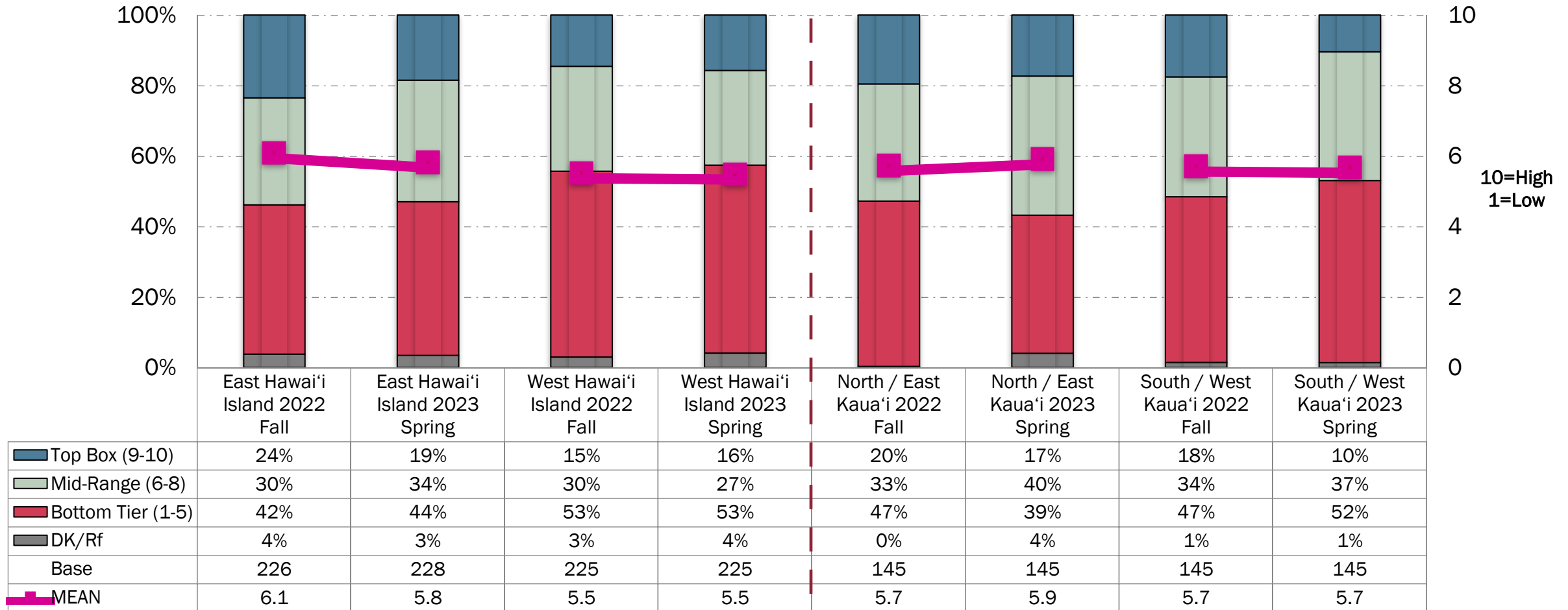
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



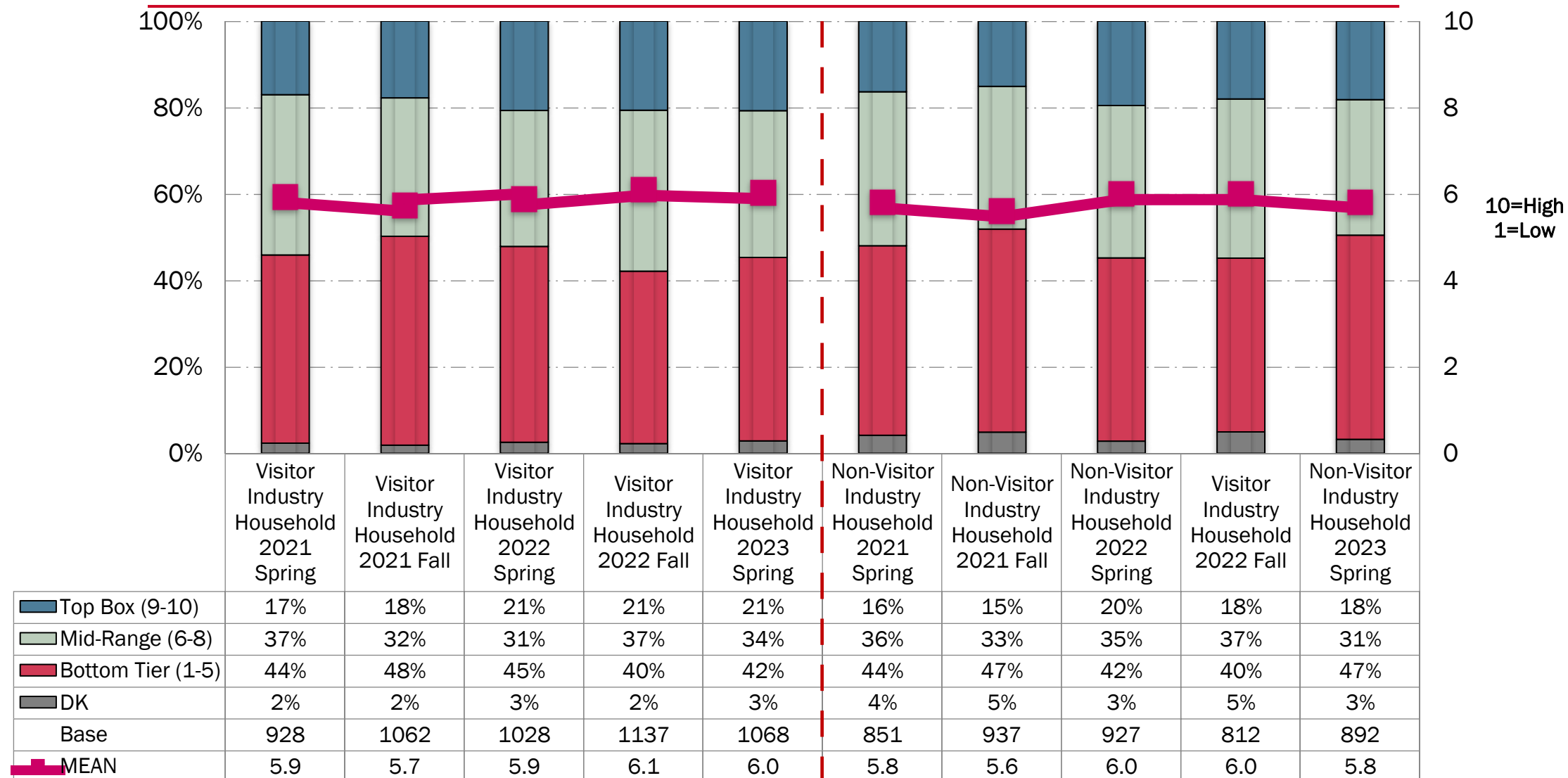
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



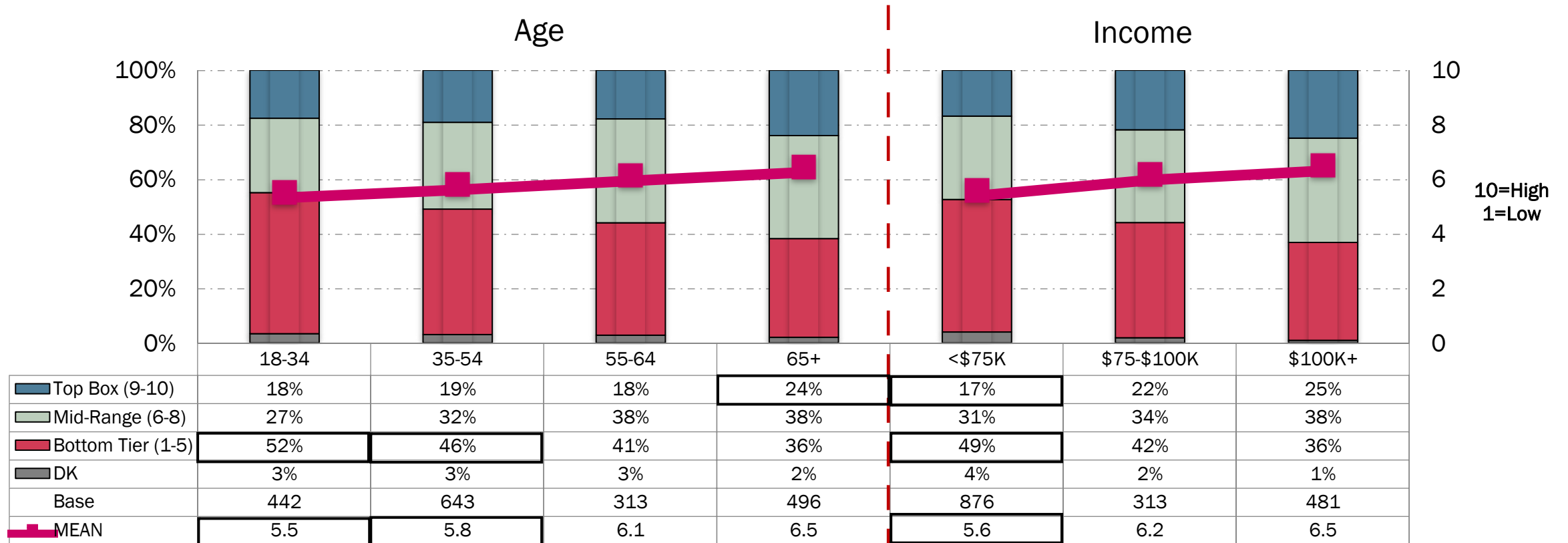
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

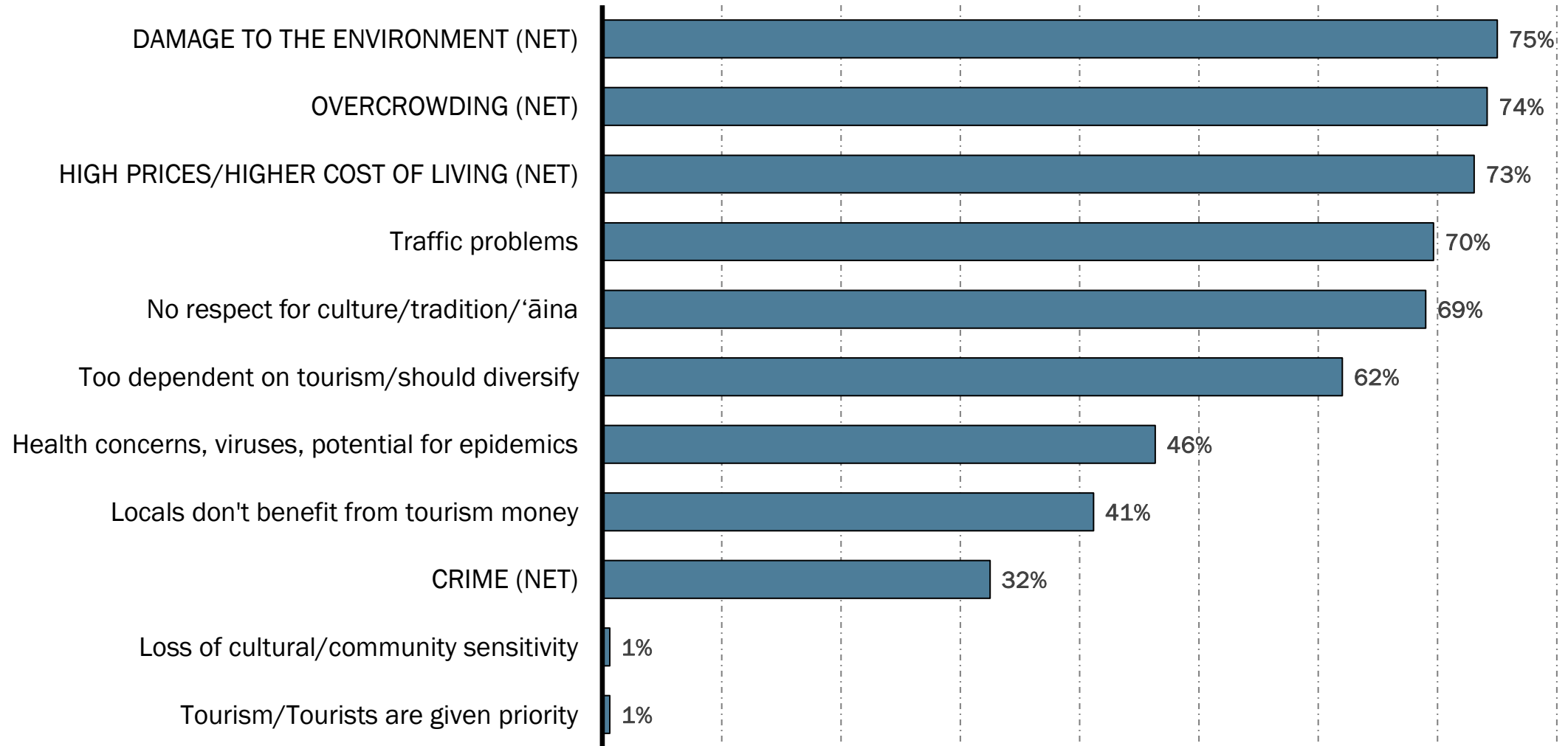
“Tourism has brought more benefits than problems” – *By Demographics*



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

Problems Created by Tourism in Hawai'i: Spring 2023 only

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

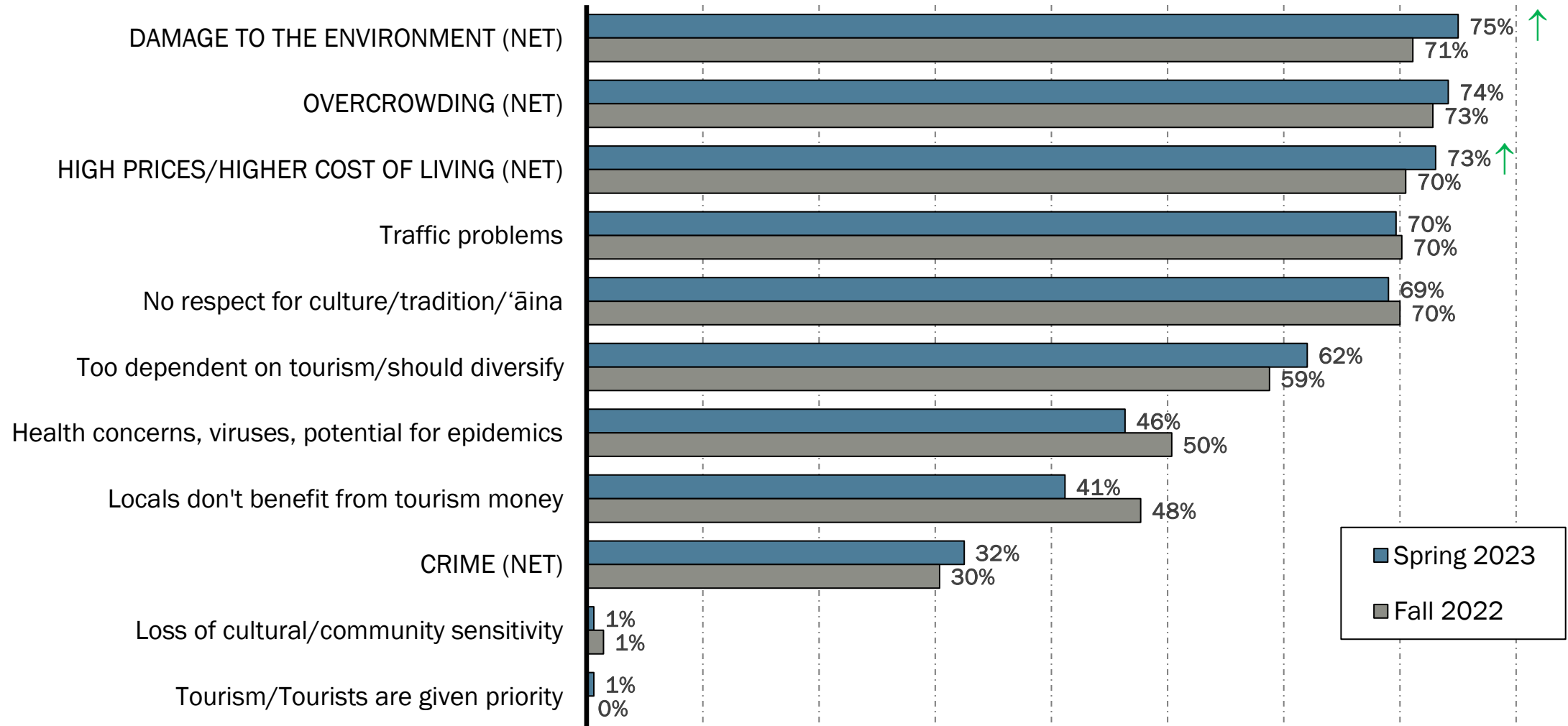


Base: 902

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

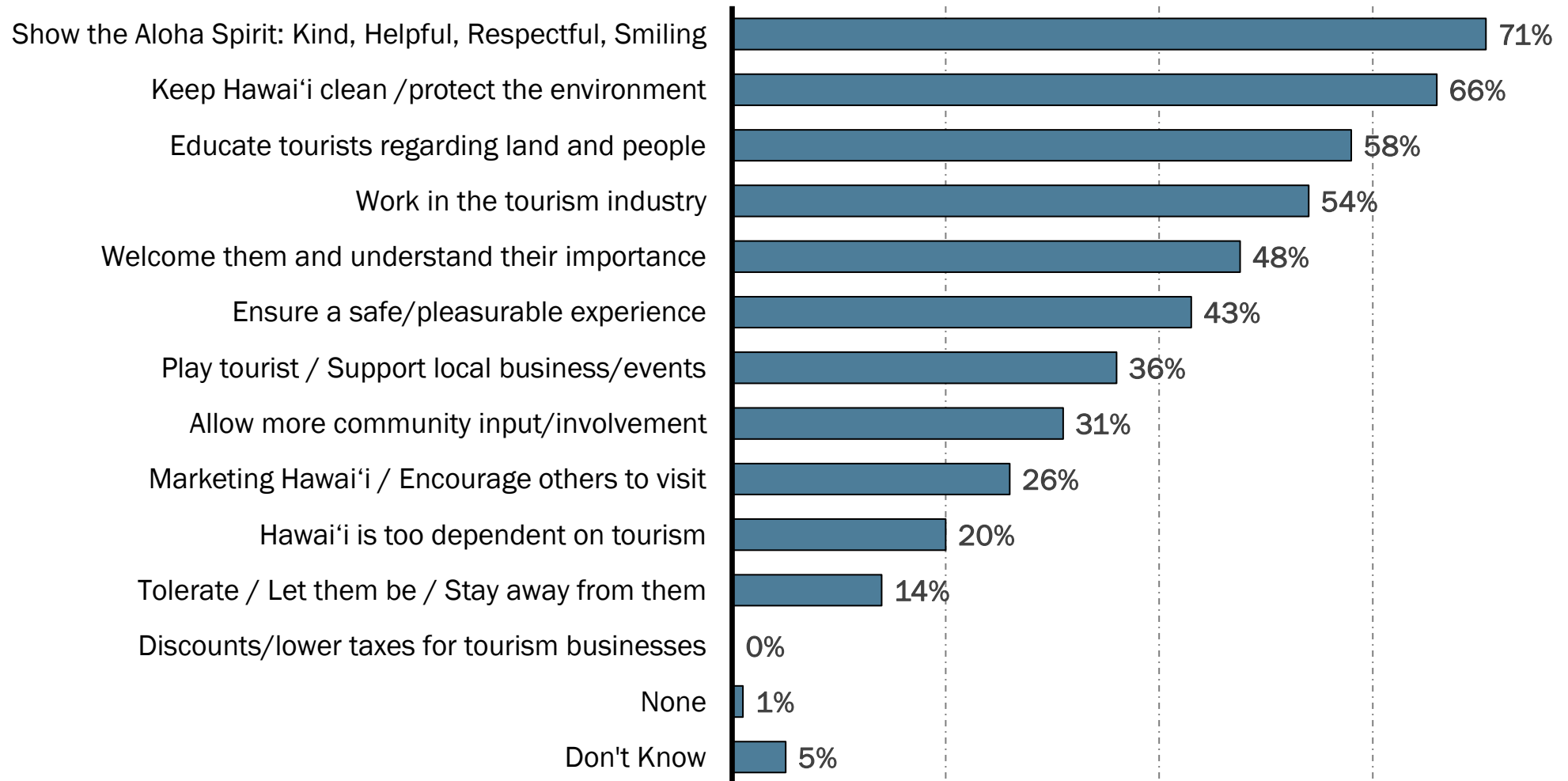
Problems Created by Tourism in Hawai'i: Fall 2022 – Spring 2023

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



Ways Residents can Support Tourism in Hawai'i: Spring 2023

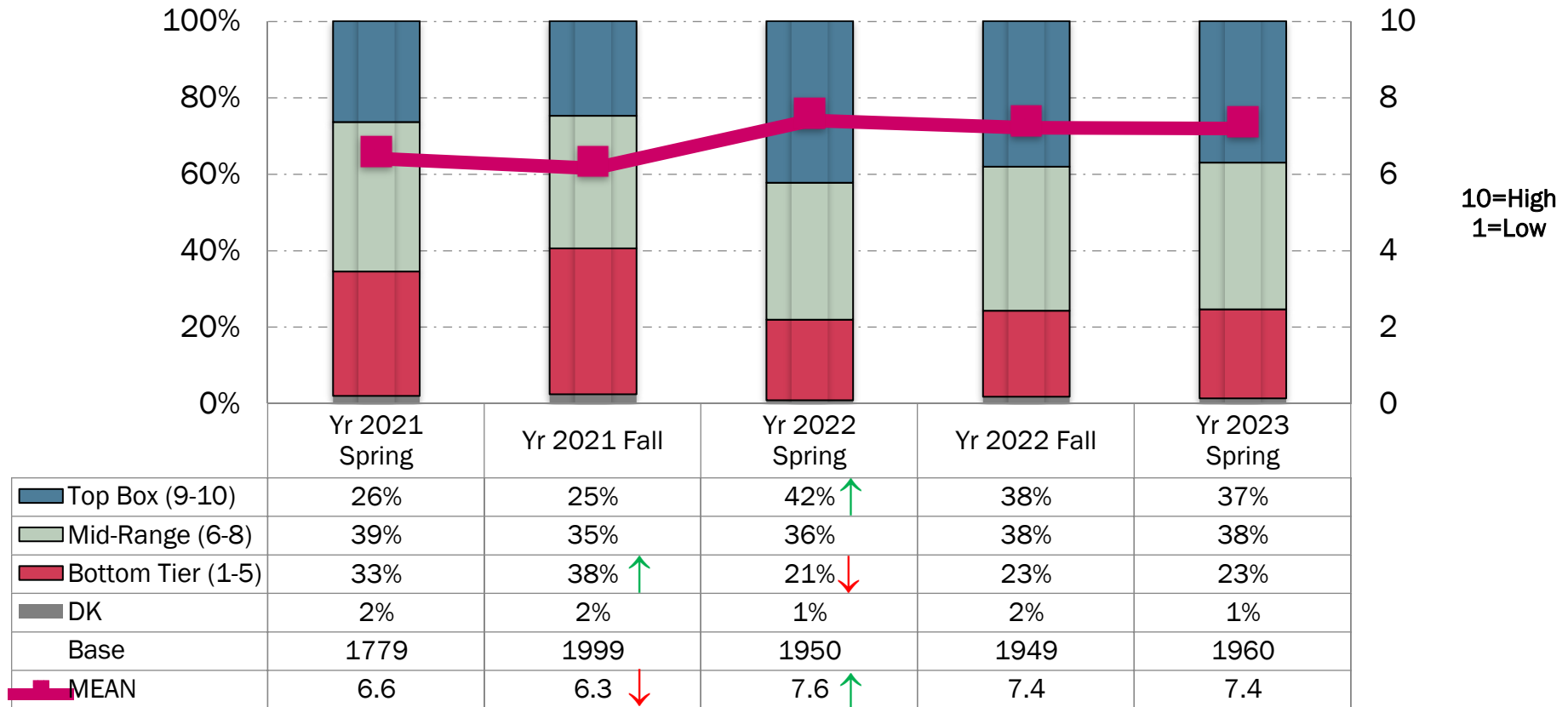
(According to residents saying Hawai'i tourism creates more **benefits** than problems)



Base: 1303

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?

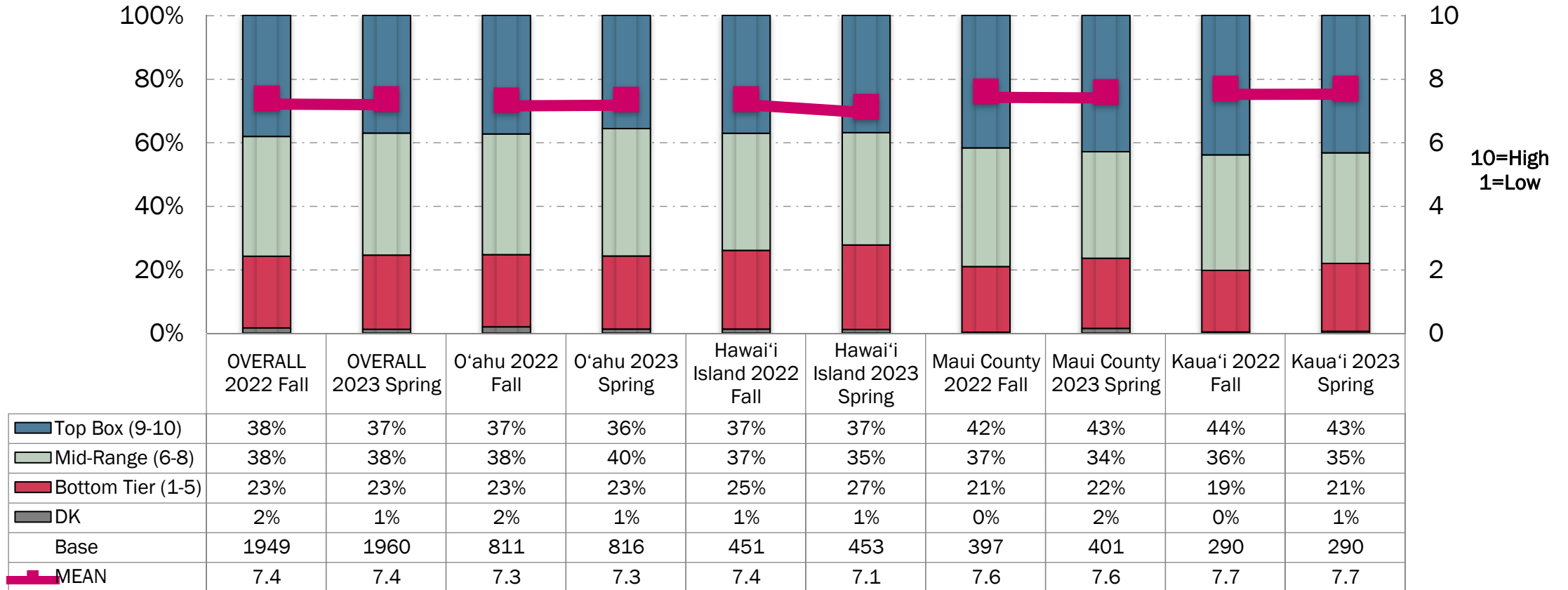
“Creates job opportunities for residents”* - Overall



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?

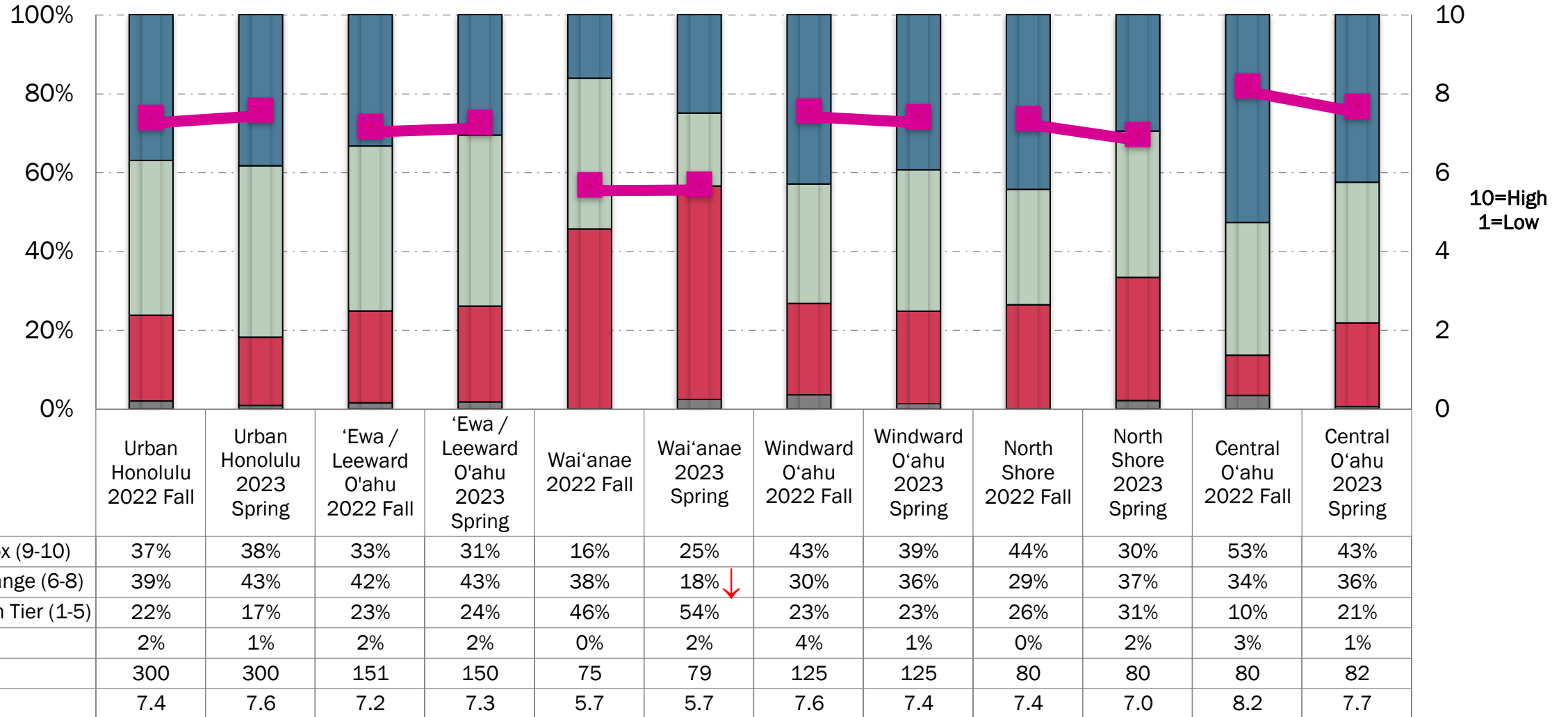
*Note: Changed in Spring 2022 fielding from “Tourism creates many well-paying jobs for residents.”

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



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

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



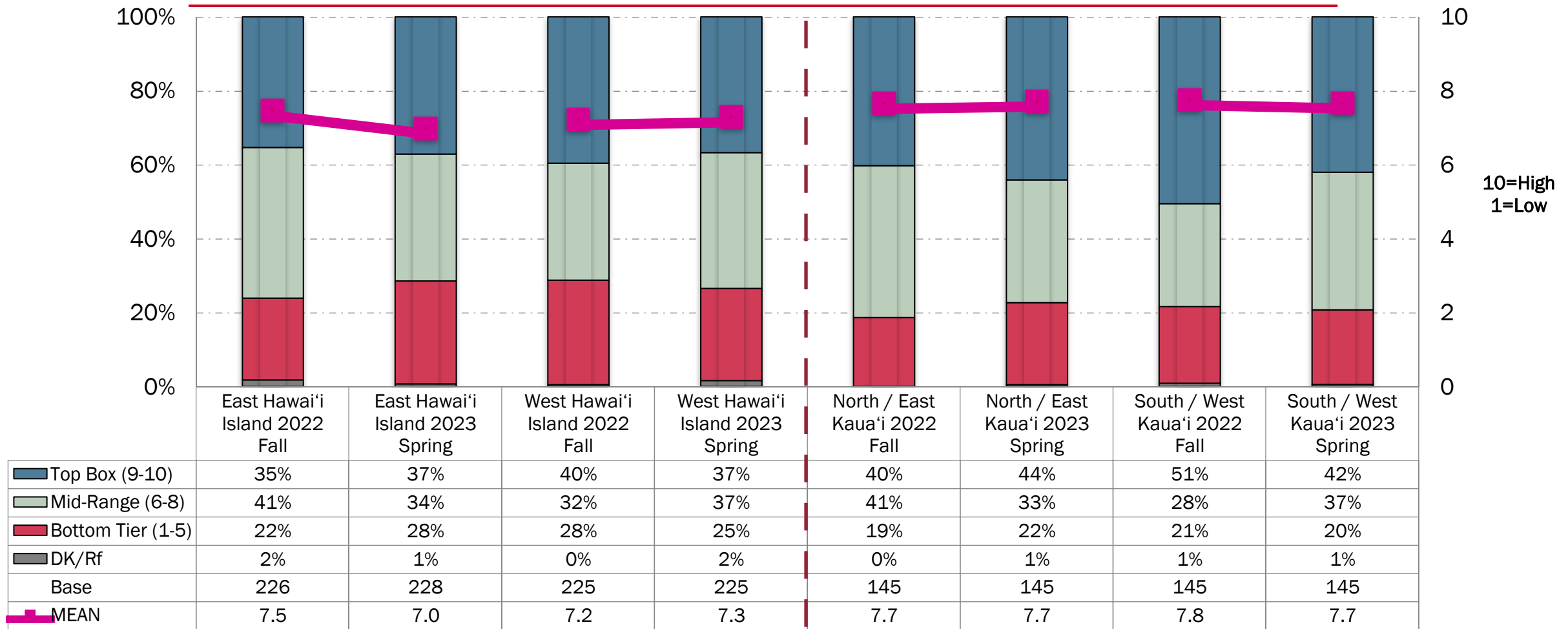
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



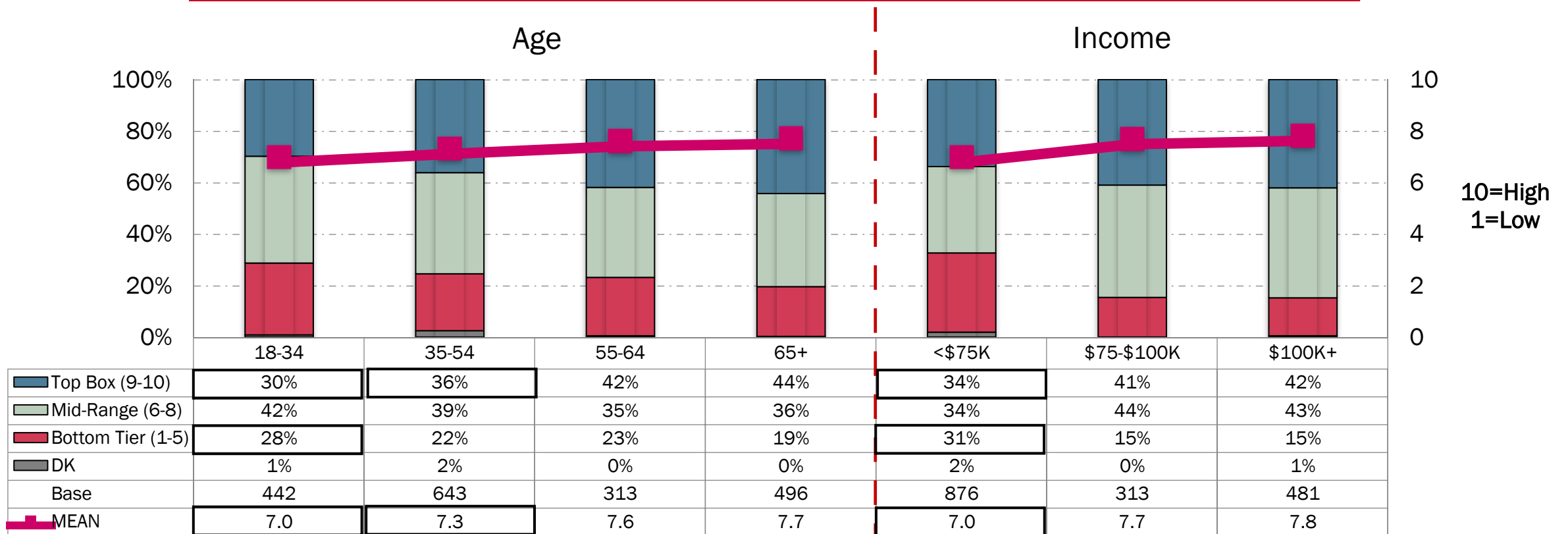
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



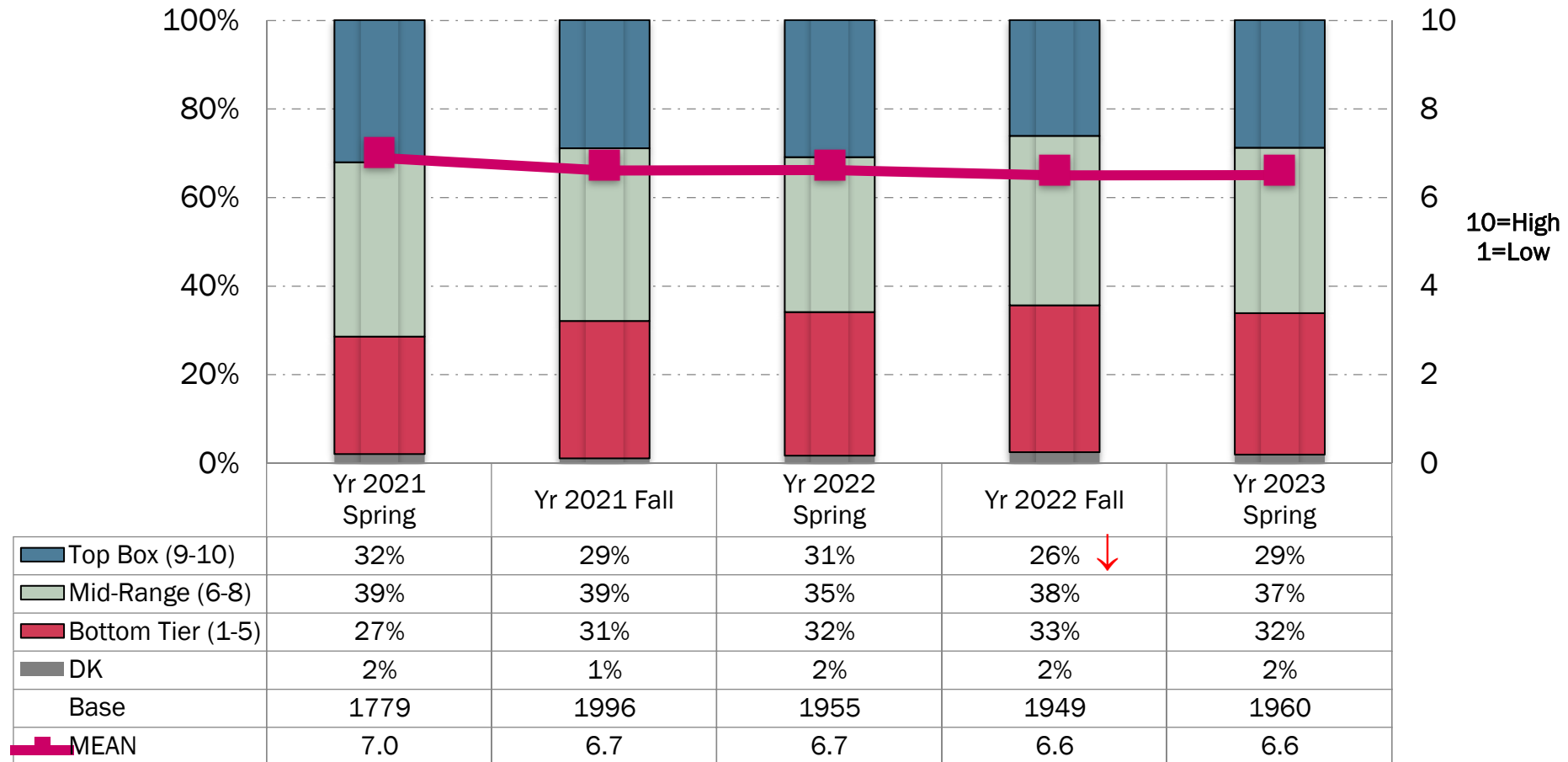
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



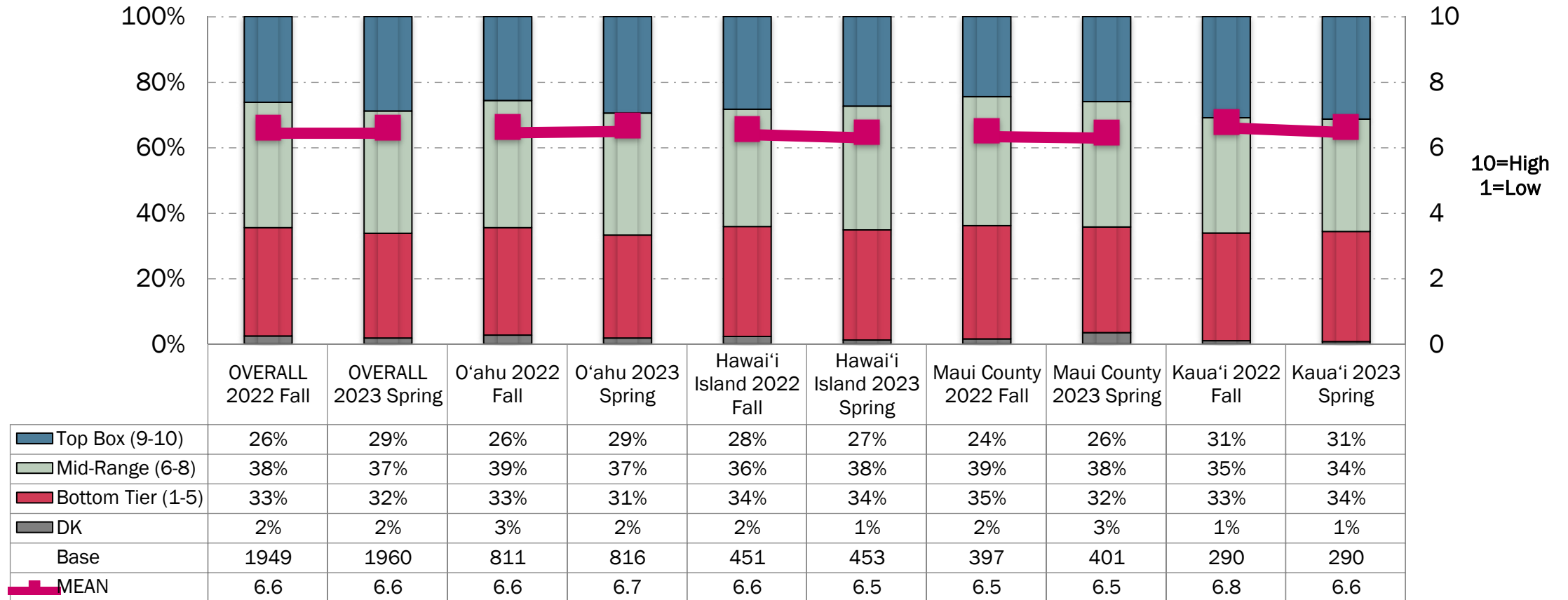
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



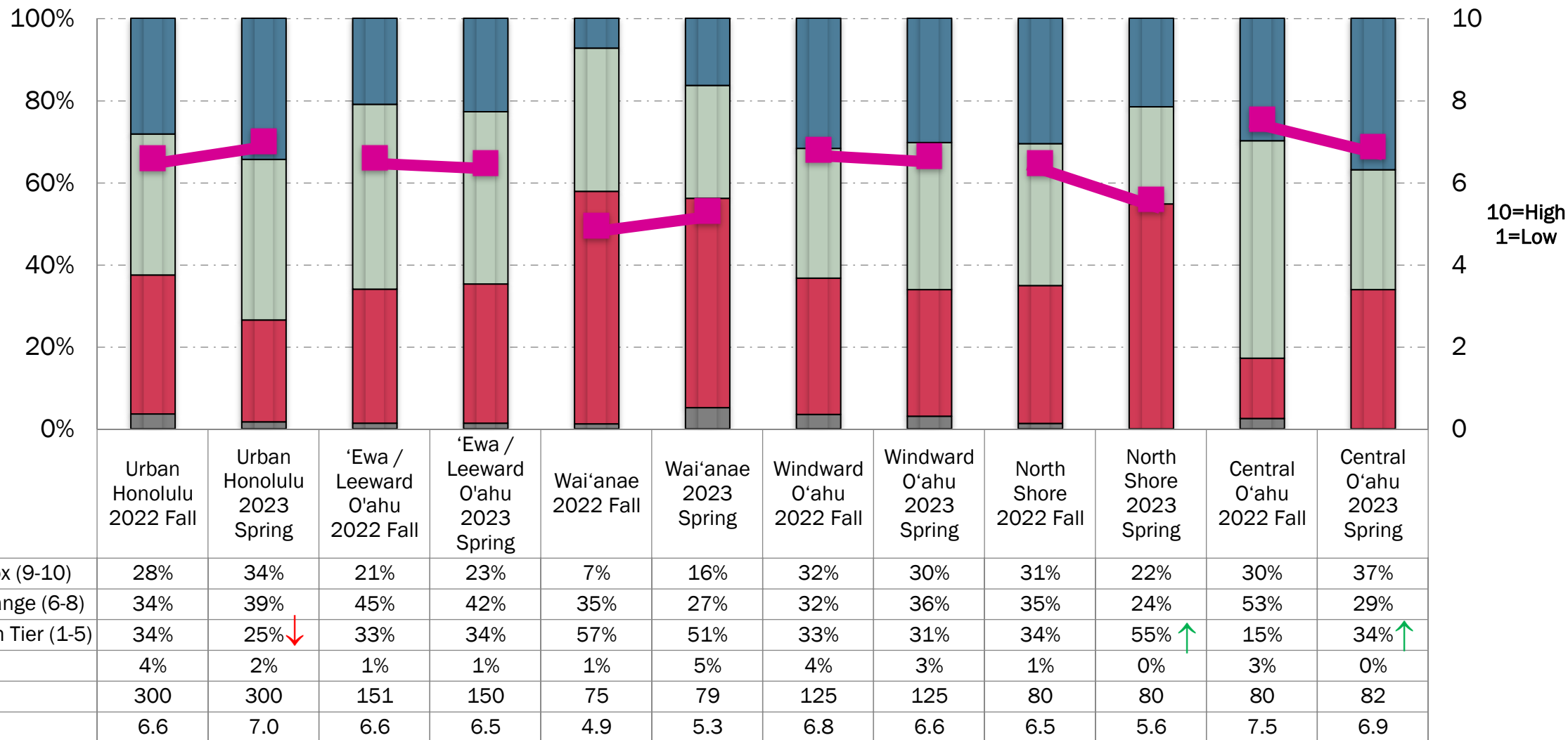
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“Creates shopping, dining, and entertainment opportunities for residents” – *By County*



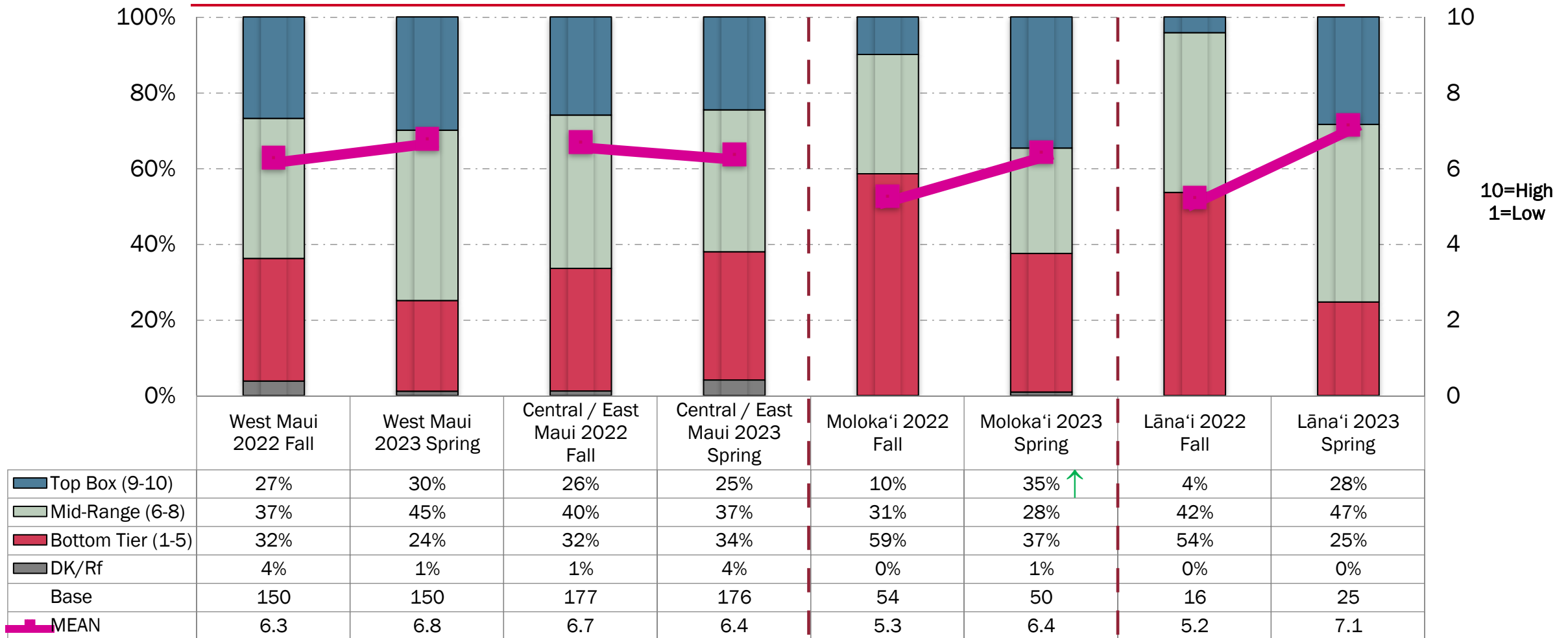
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



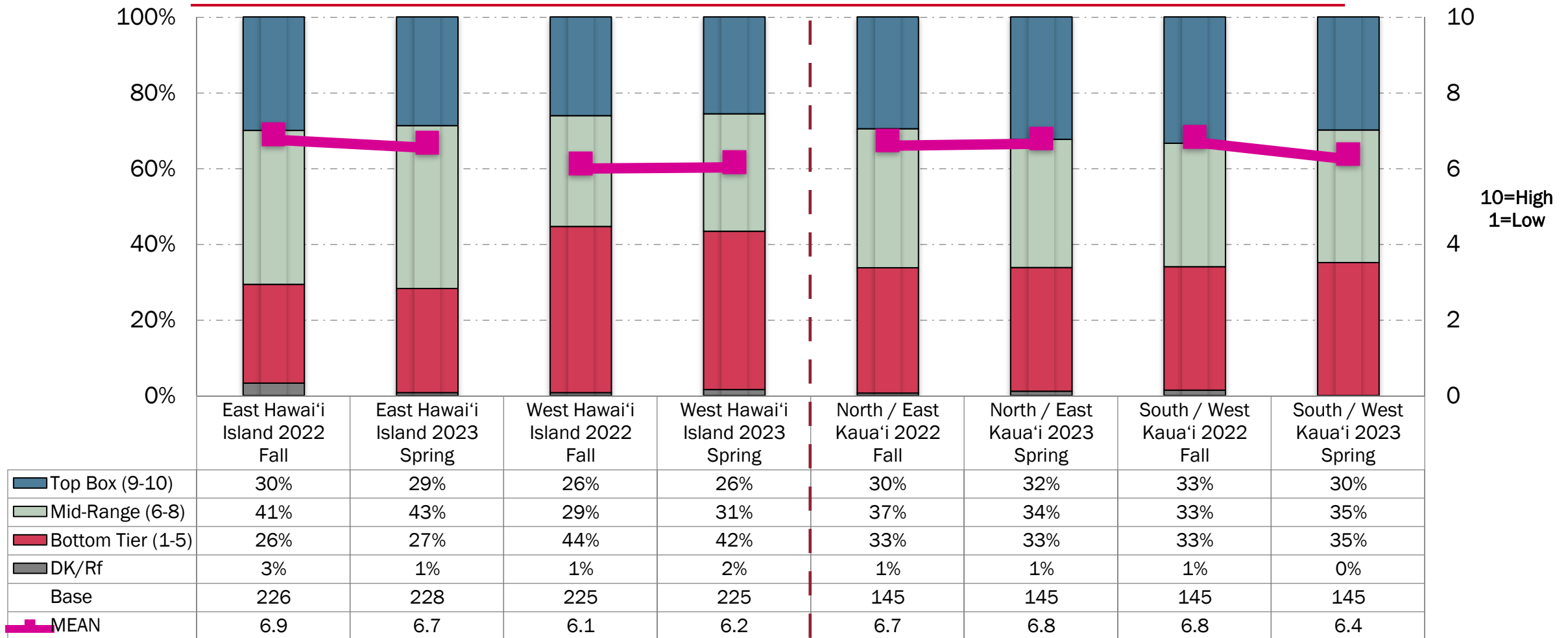
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



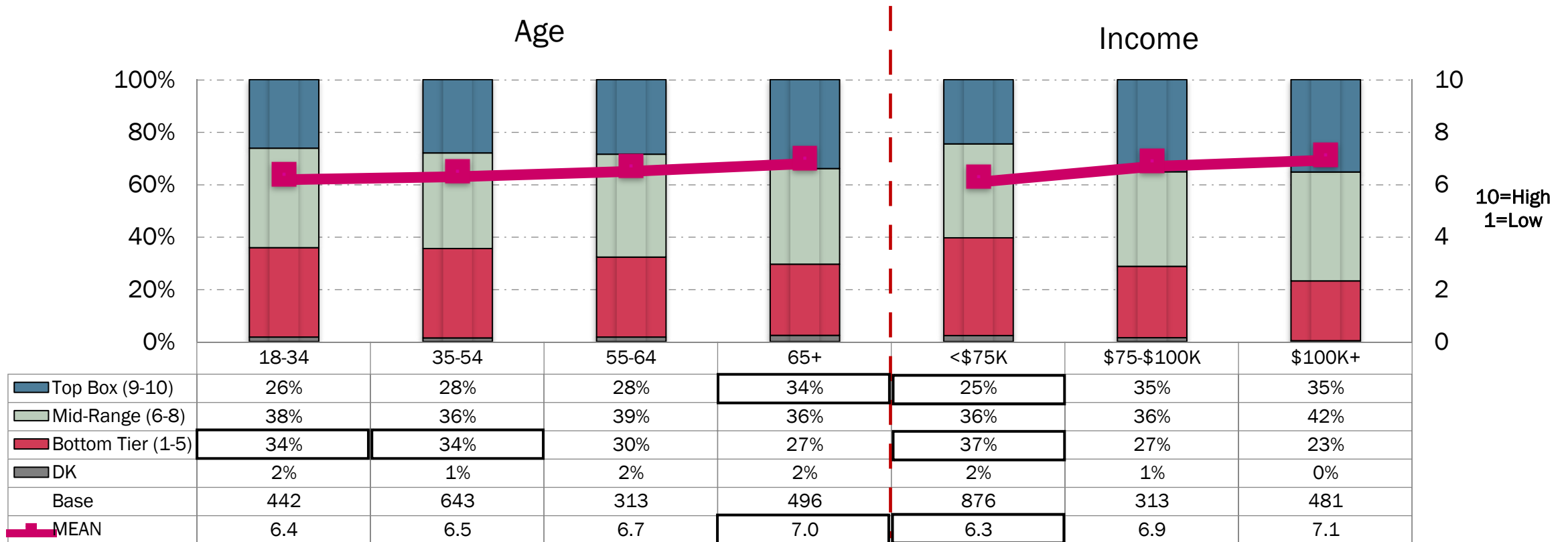
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



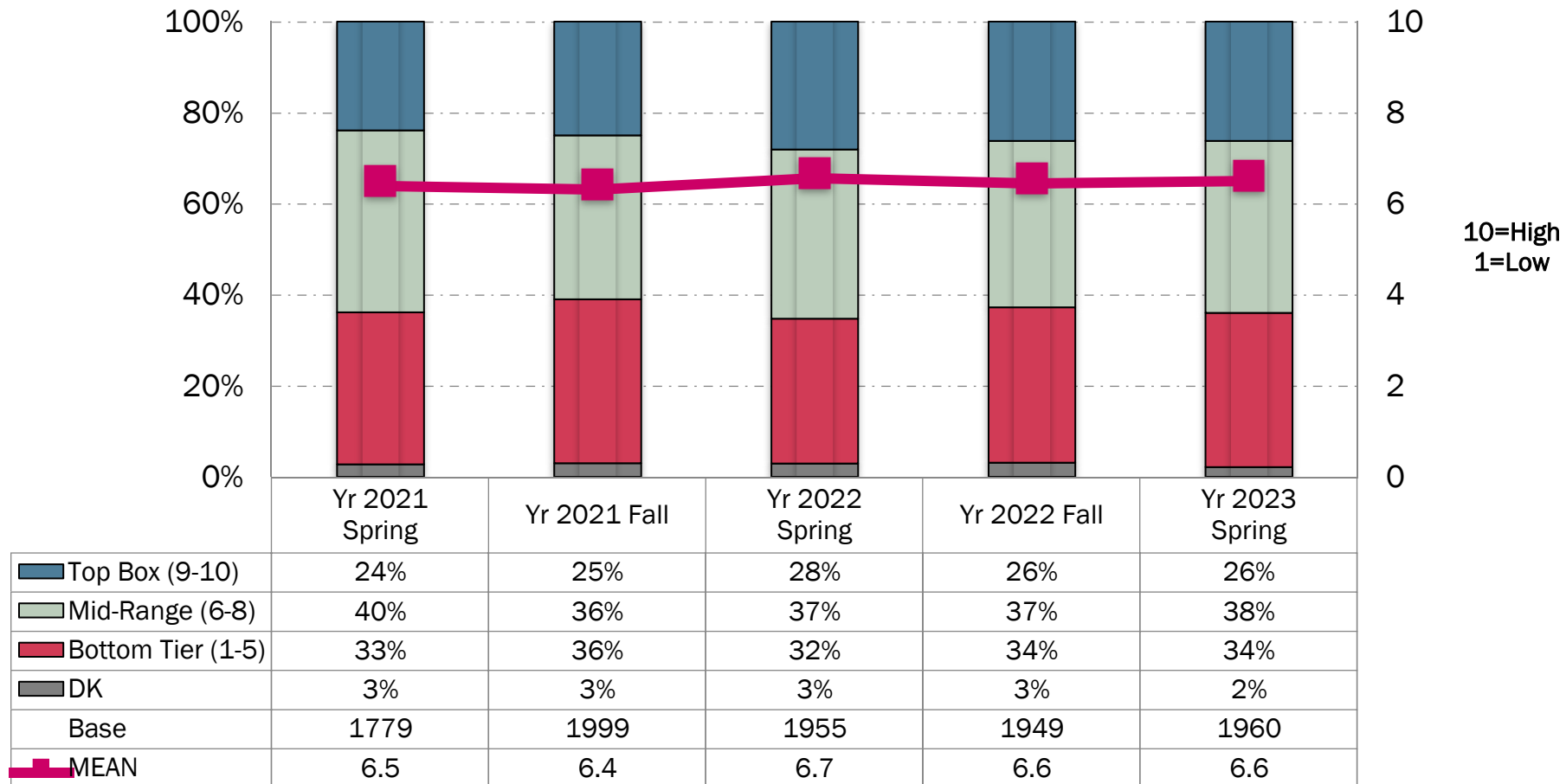
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



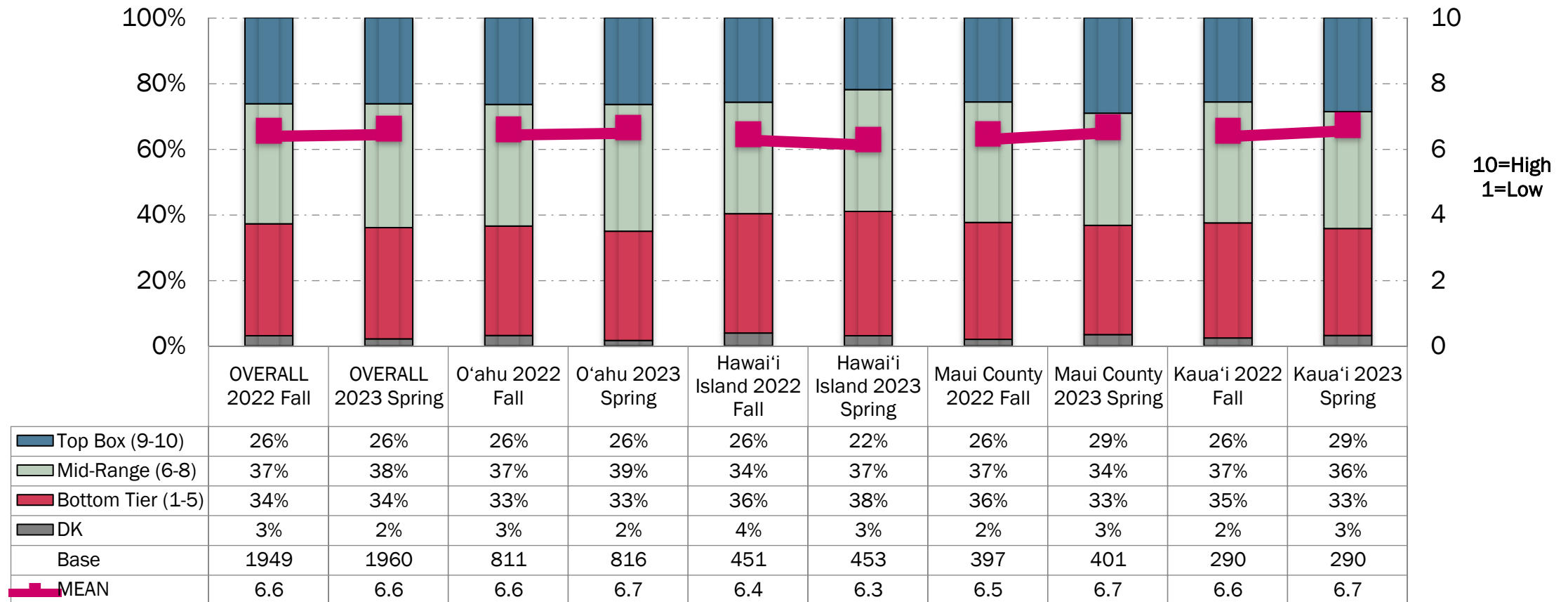
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



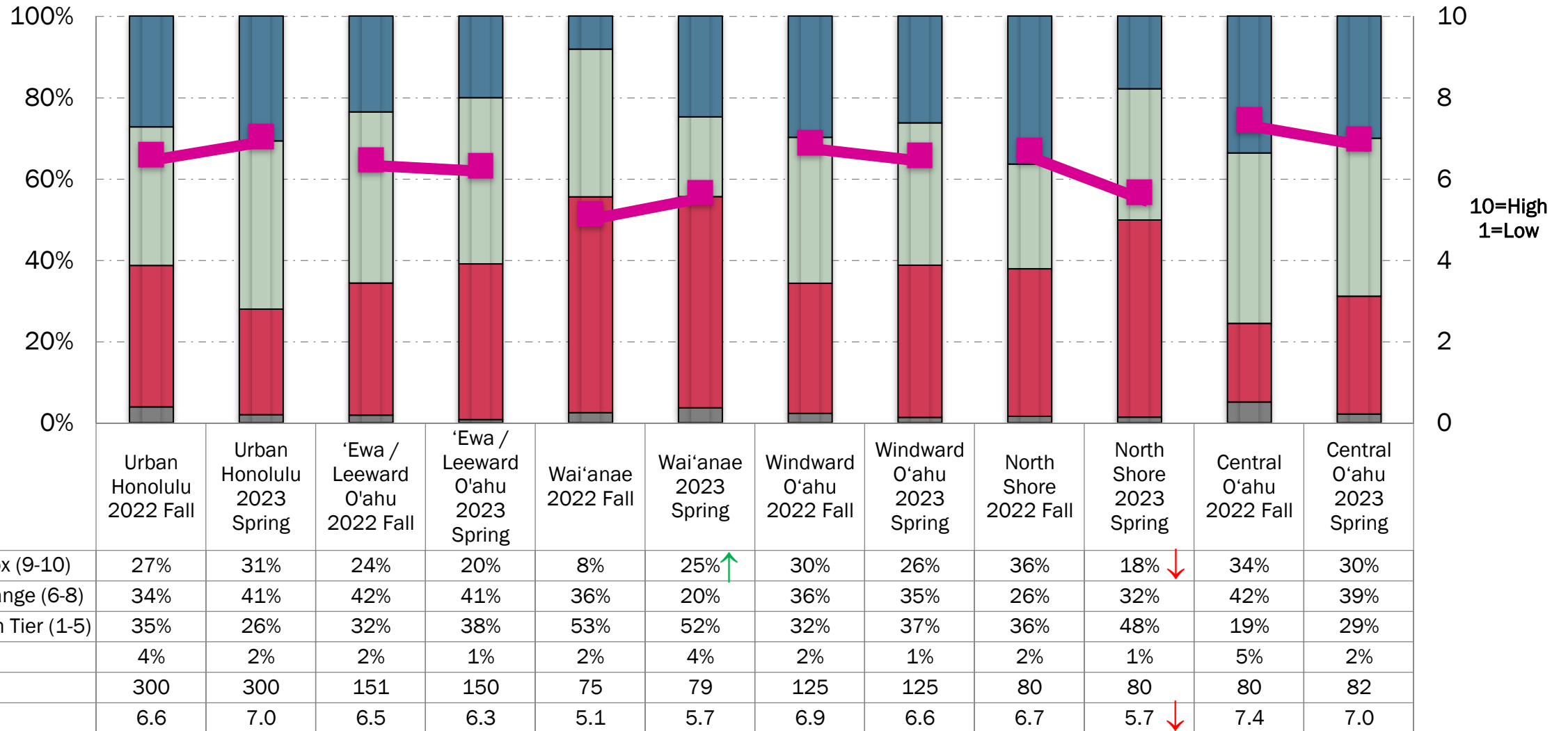
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“Creates job opportunities with paths for advancement” – *By County*

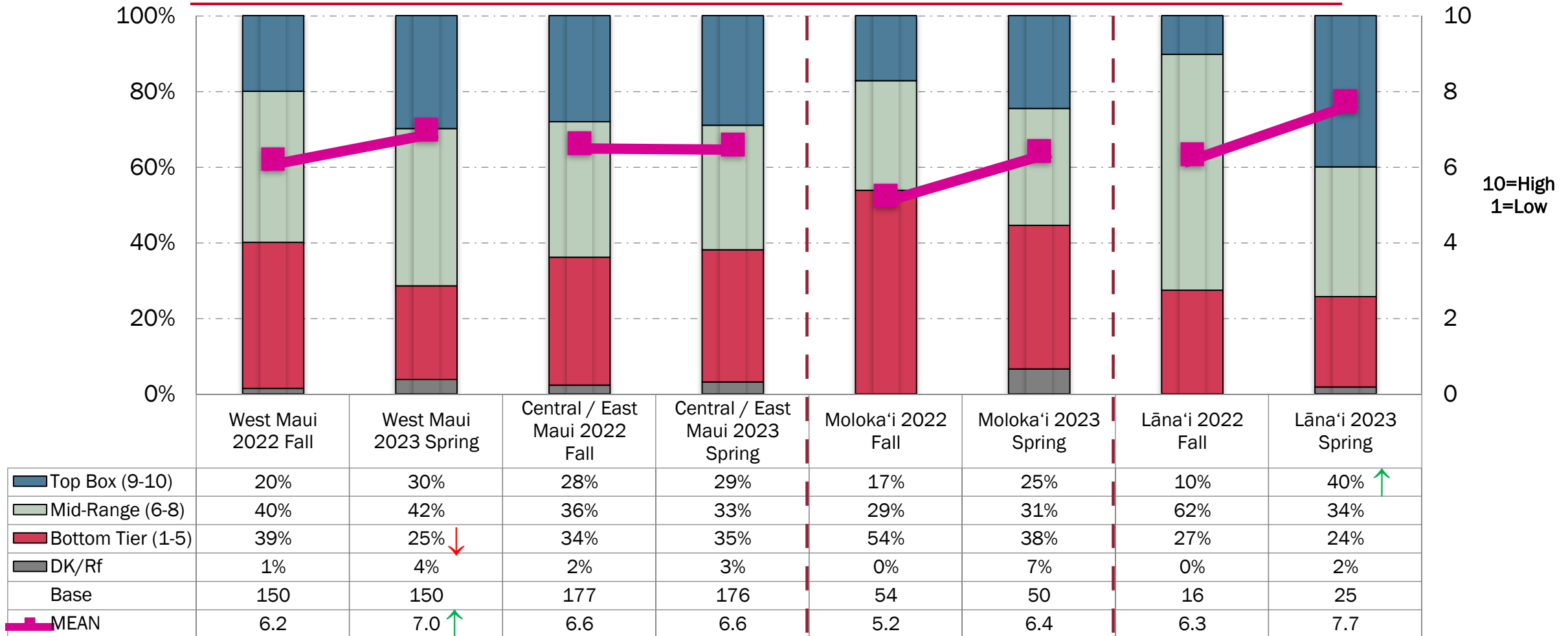


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“Creates job opportunities with paths for advancement” – By Area (O‘ahu)

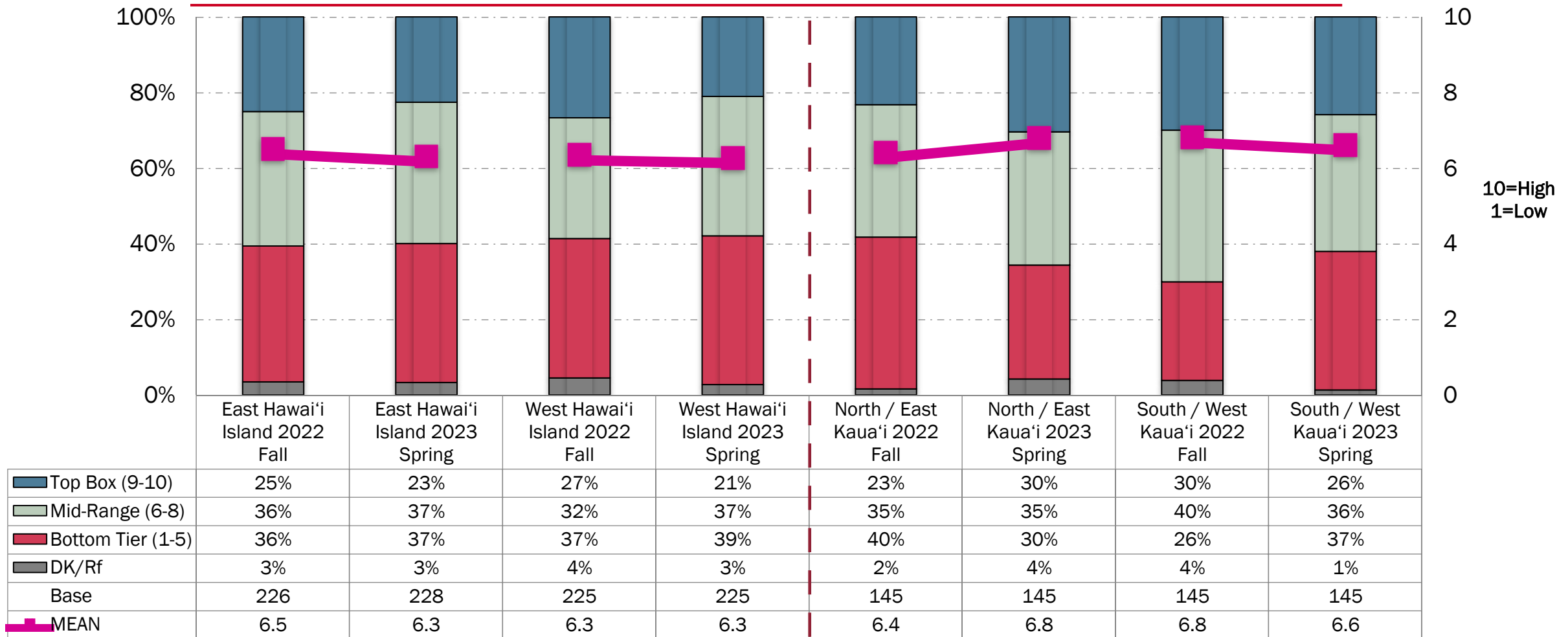


“Creates job opportunities with paths for advancement” – By Area (Maui County)



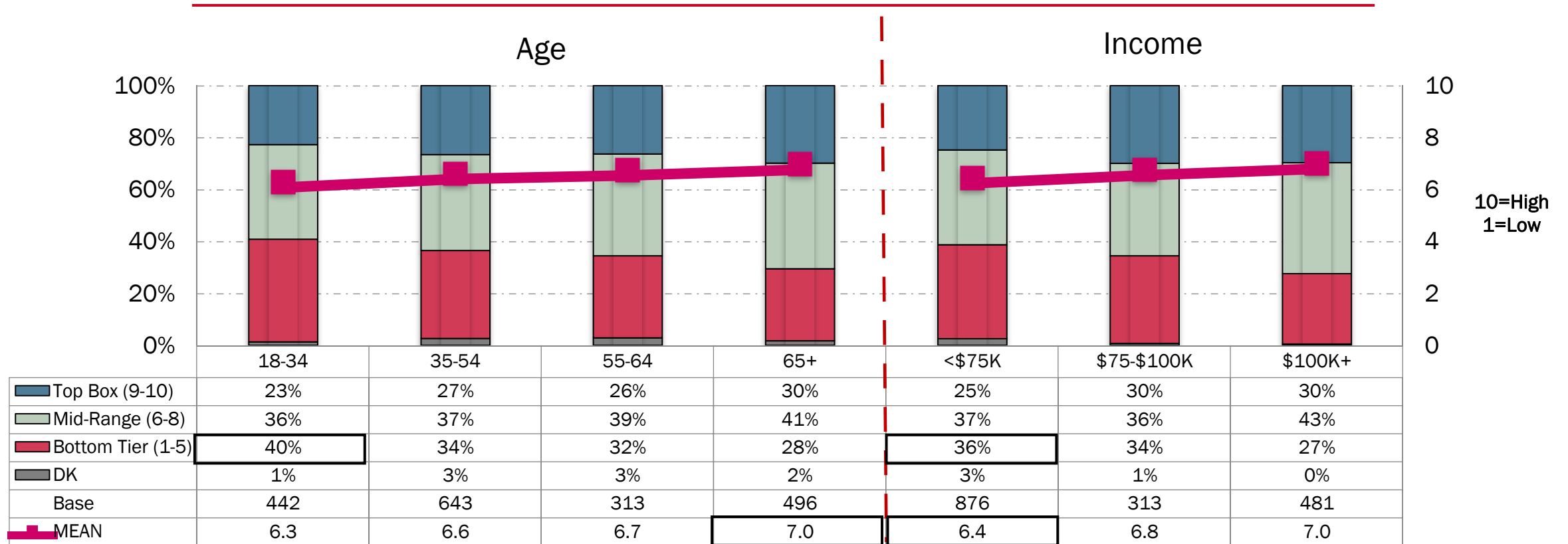
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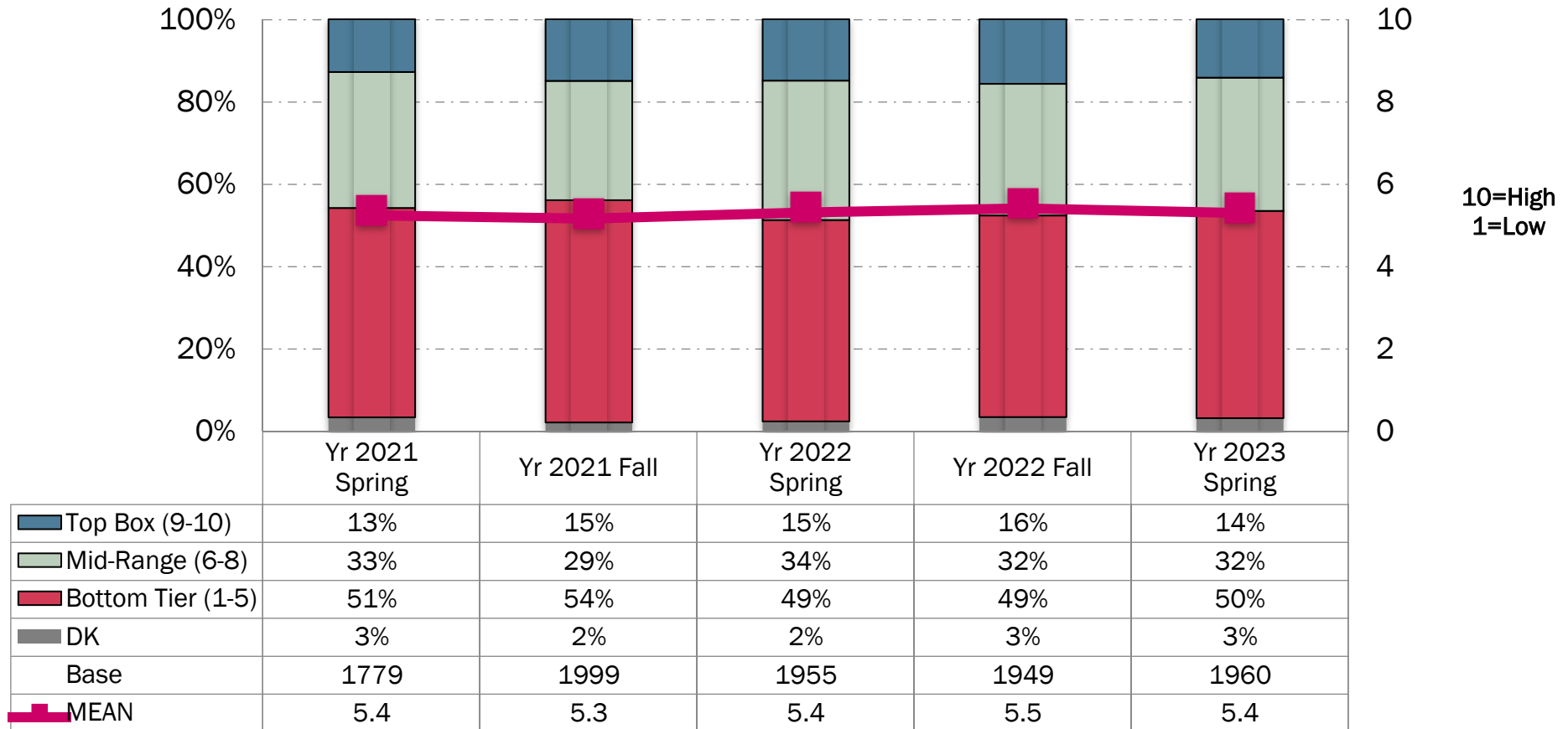
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“Creates job opportunities with paths for advancement” – *By Demographics*



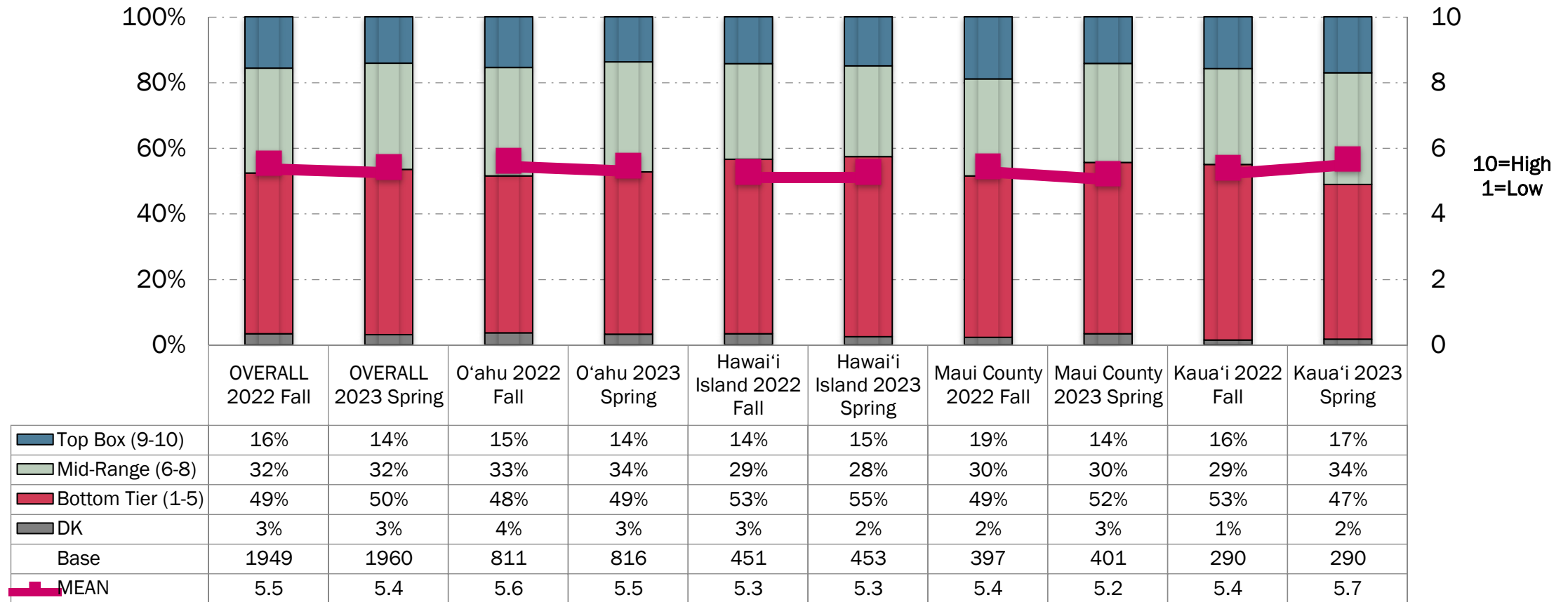
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“Is an industry that enhances residents’ quality of life” - Overall



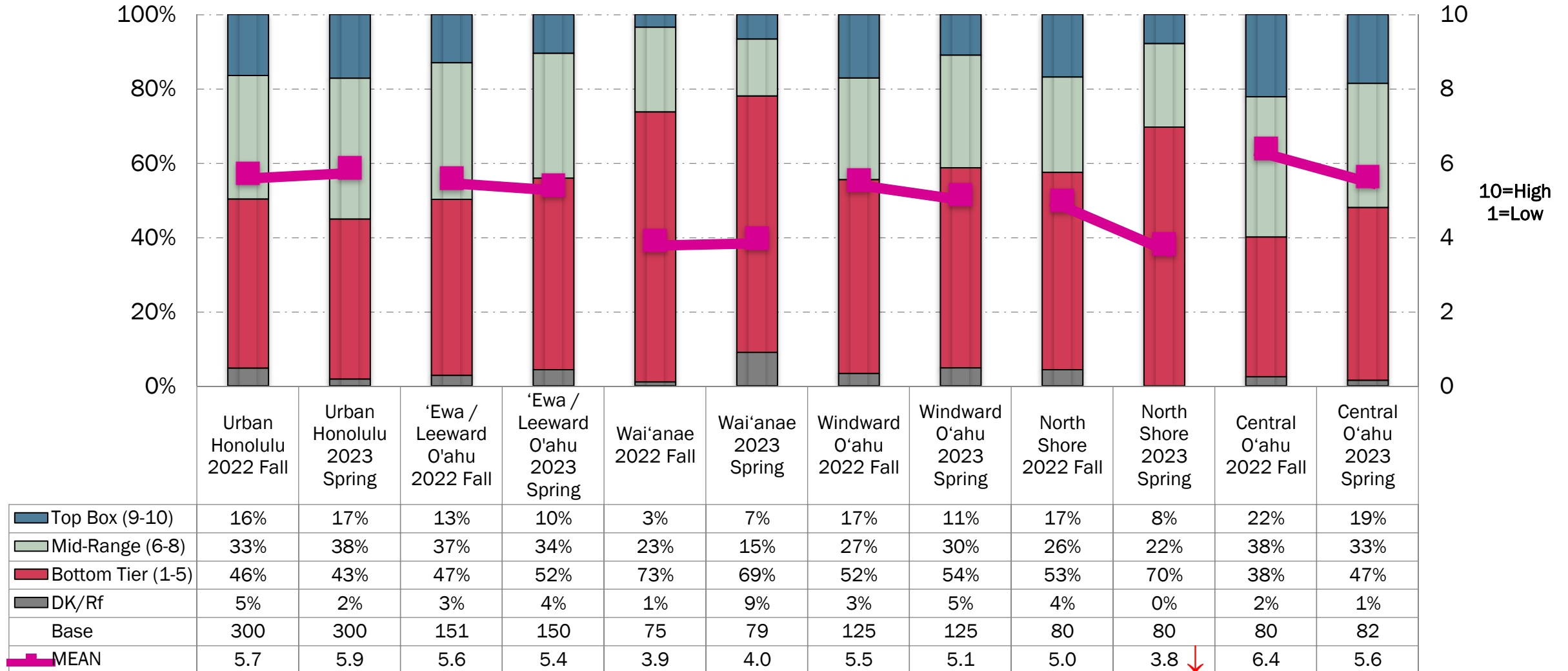
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“Is an industry that enhances residents’ quality of life” – *By County*



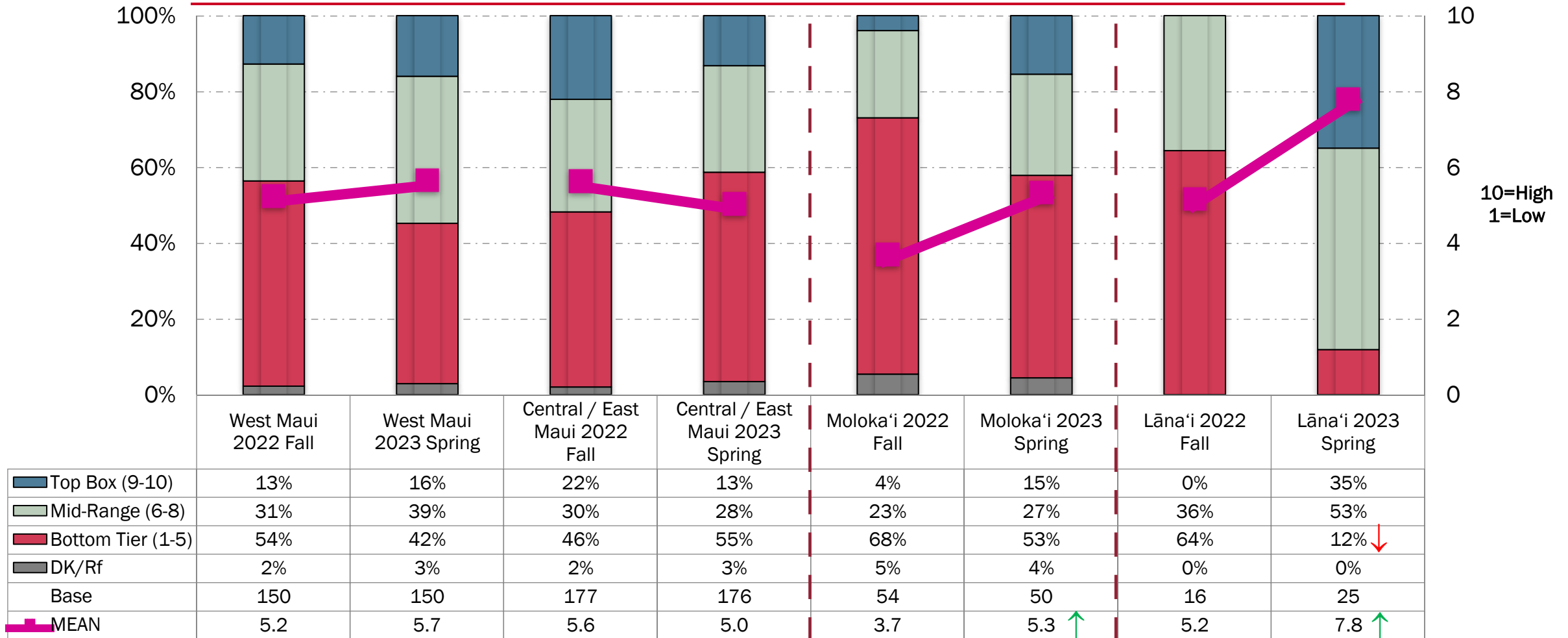
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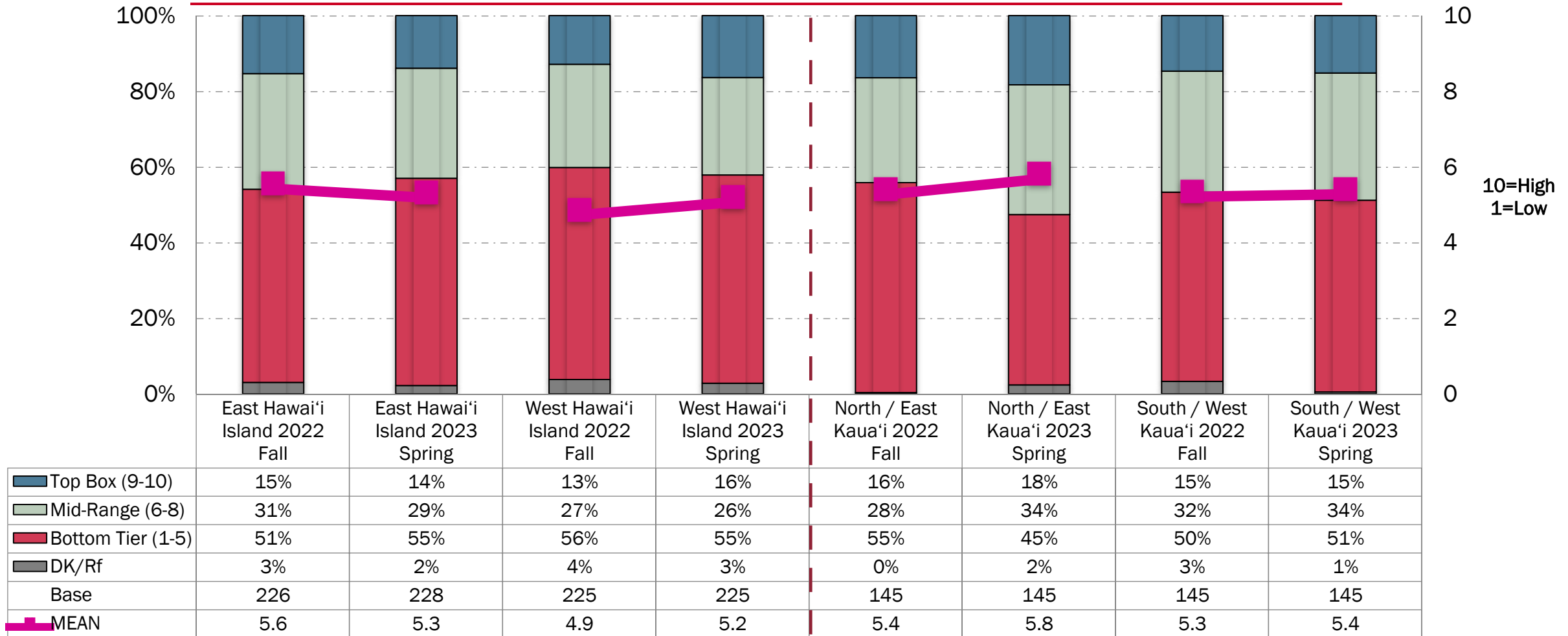
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“Is an industry that enhances residents’ quality of life” – By Area (Maui County)



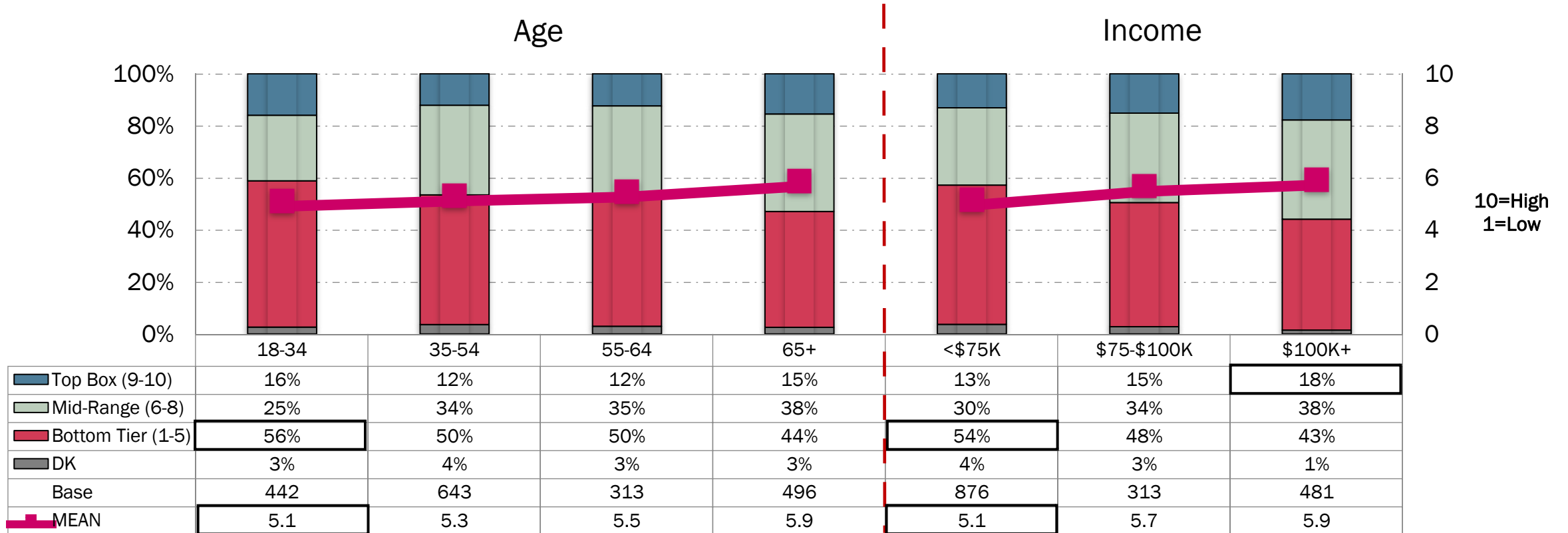
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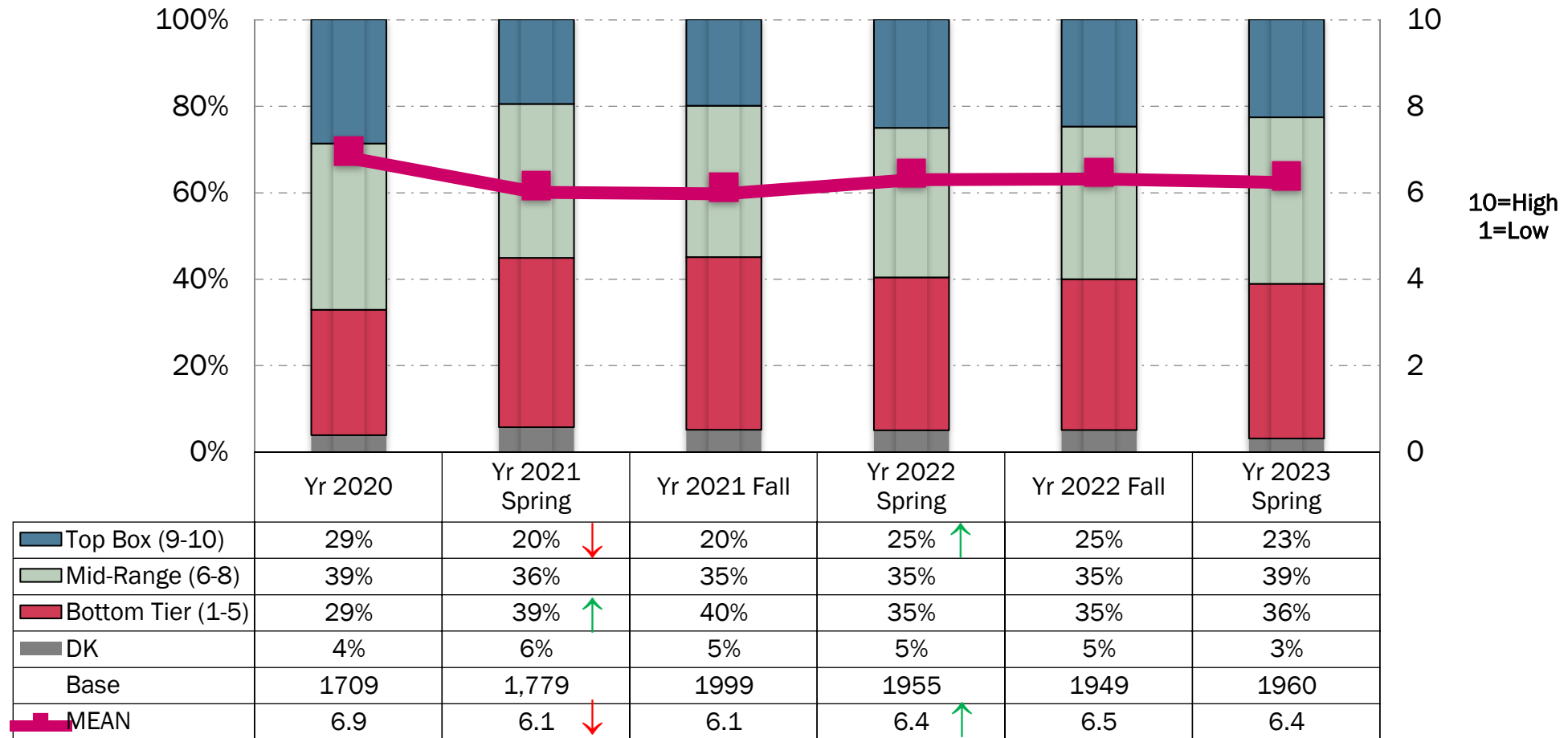
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“Is an industry that enhances residents’ quality of life” – By Demographics



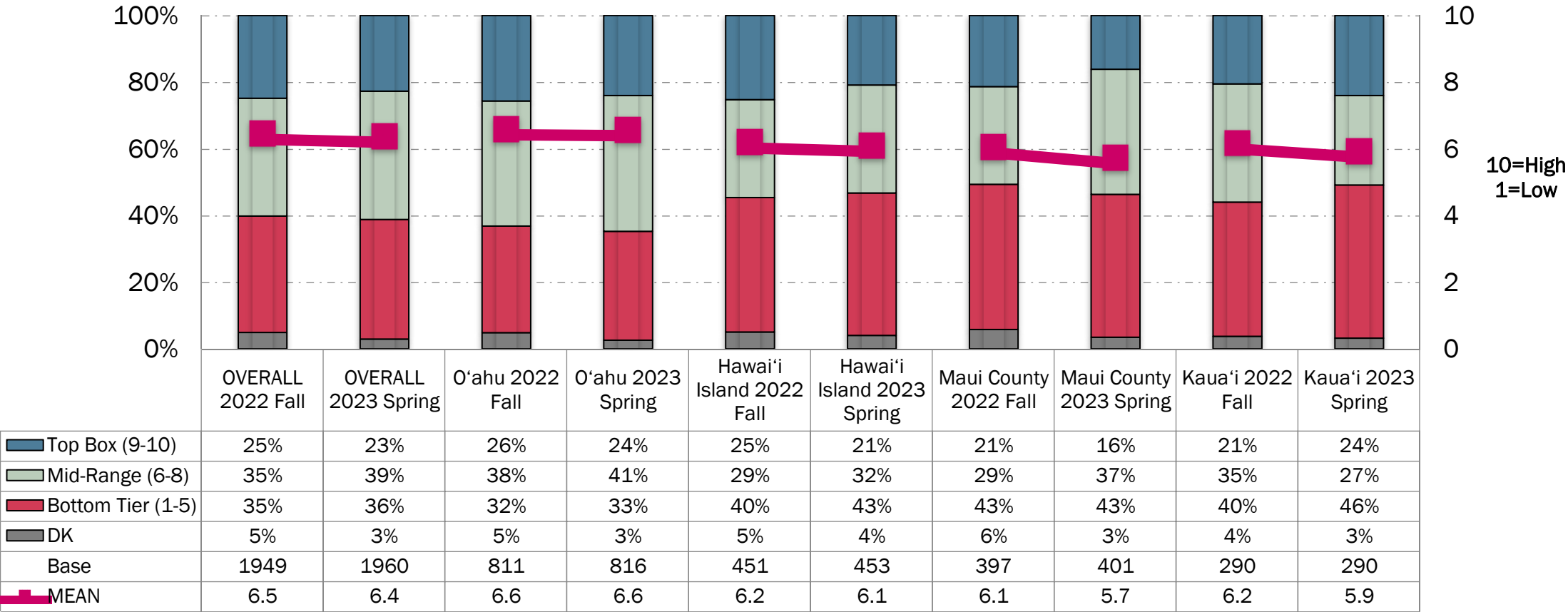
Q3.6. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



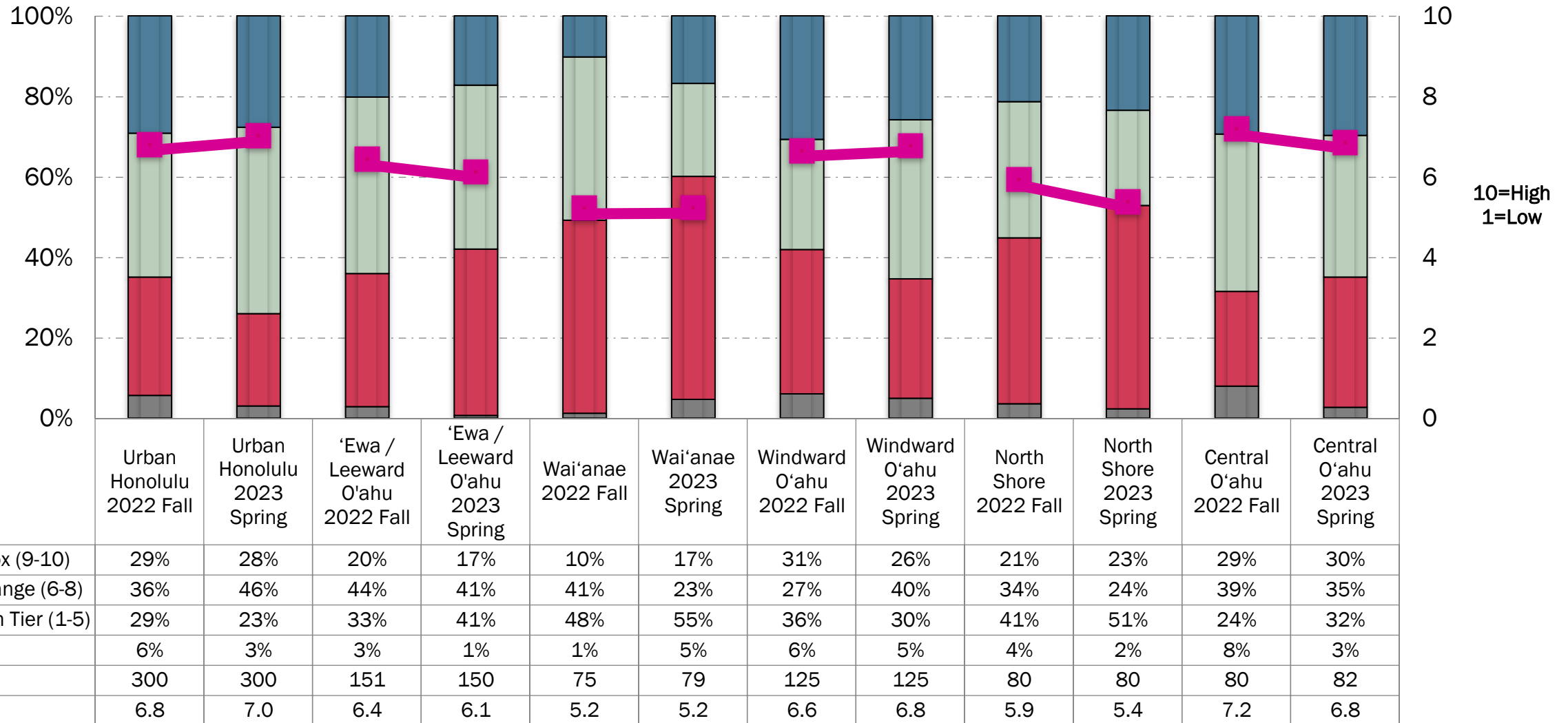
Q3.7. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



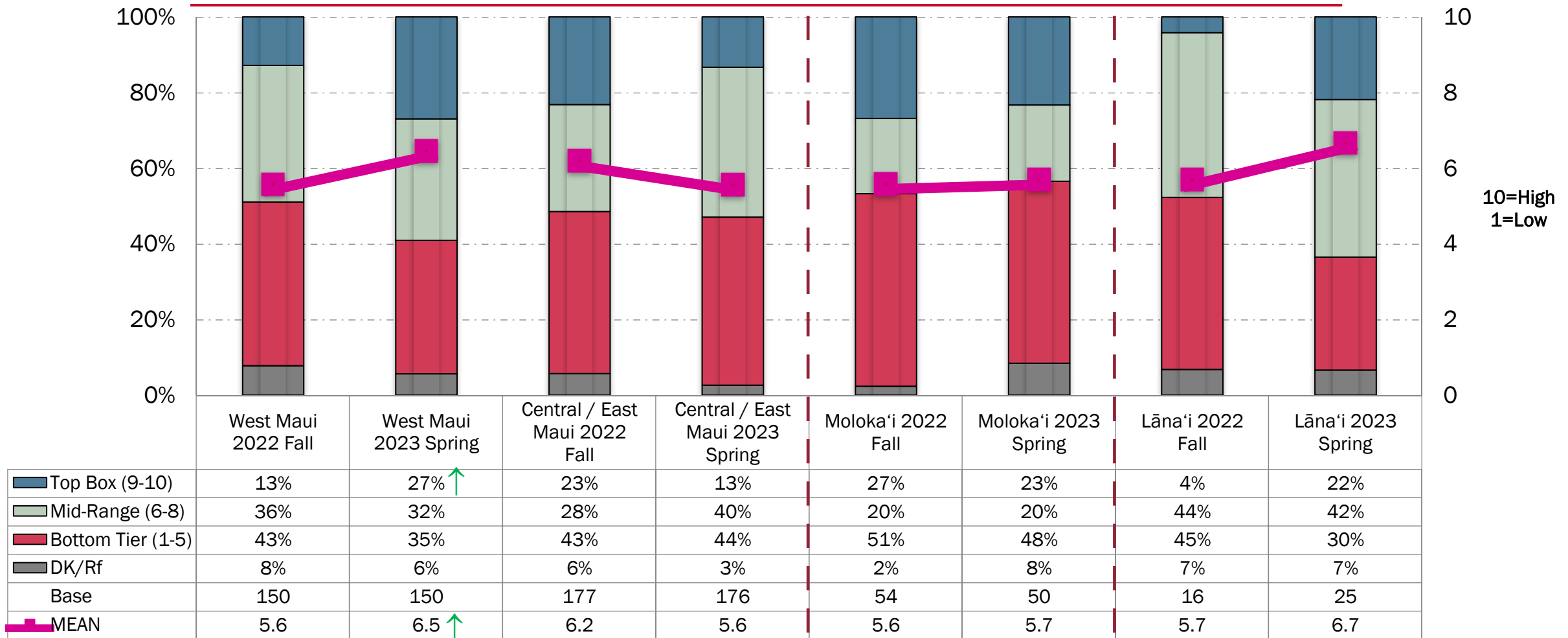
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“Sponsors festivals, activities, & sports events for residents & visitors” – *By Area (O‘ahu)*



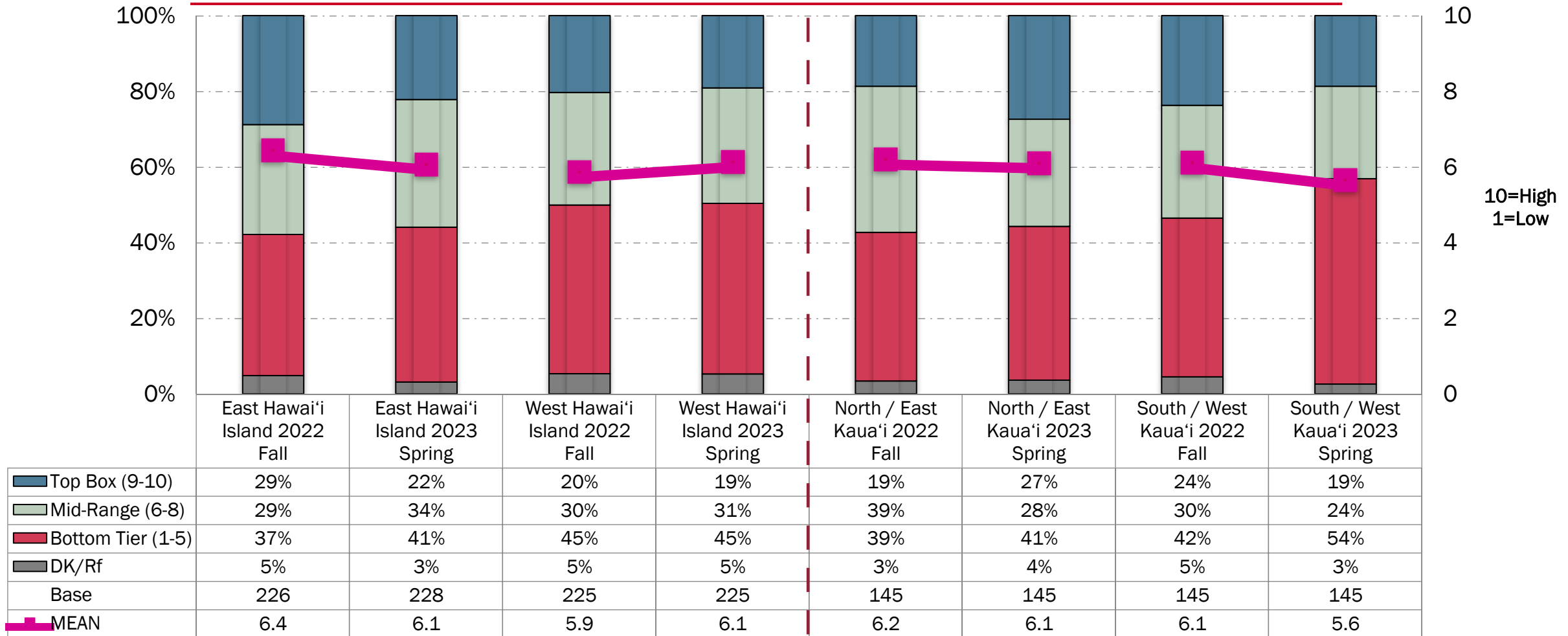
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“Sponsors festivals, activities, & sports events for residents & visitors” – By Area (Maui County)



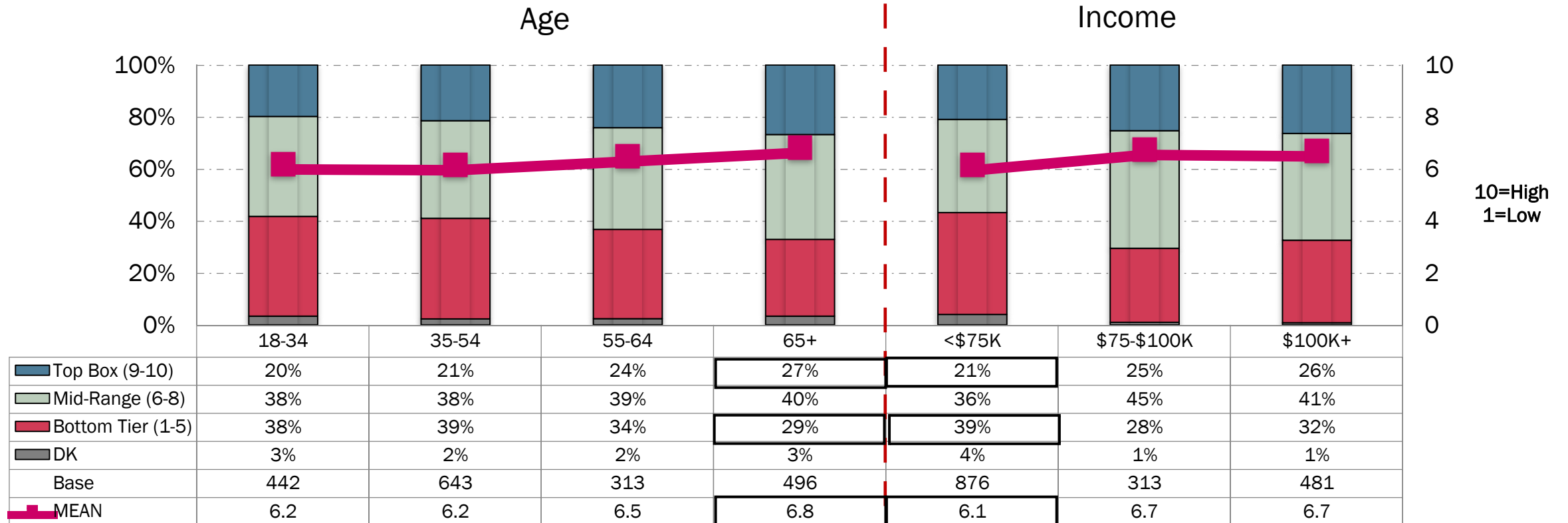
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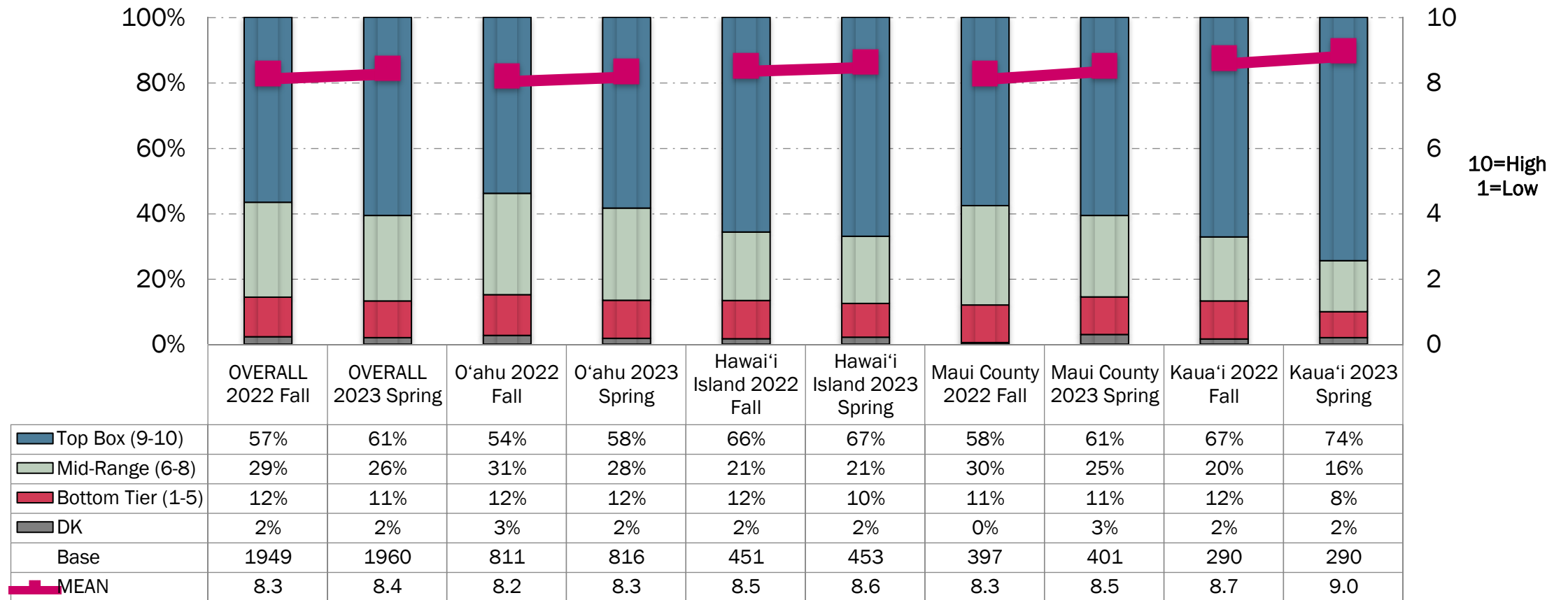
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“Sponsors festivals, activities, & sports events for residents & visitors” – By Demographics



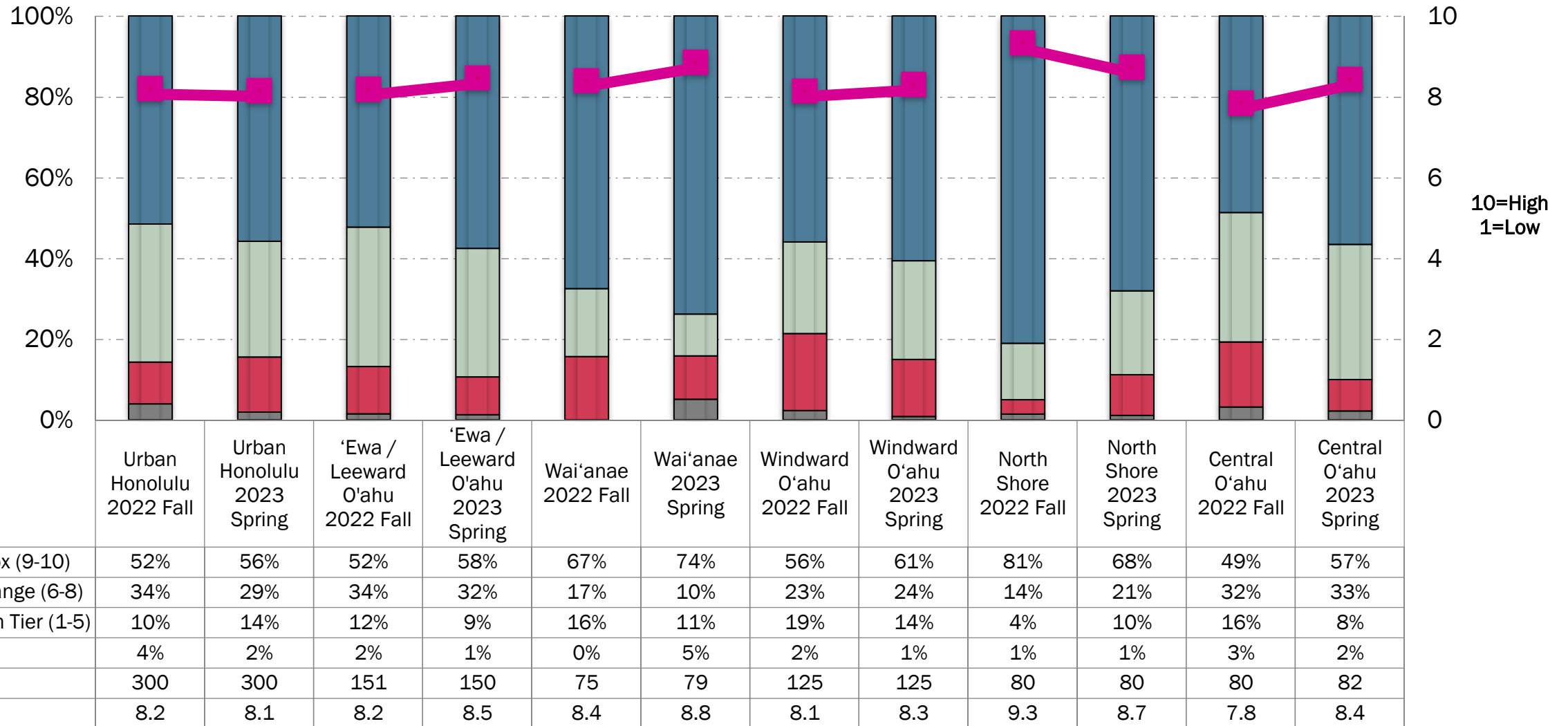
Q3.7. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

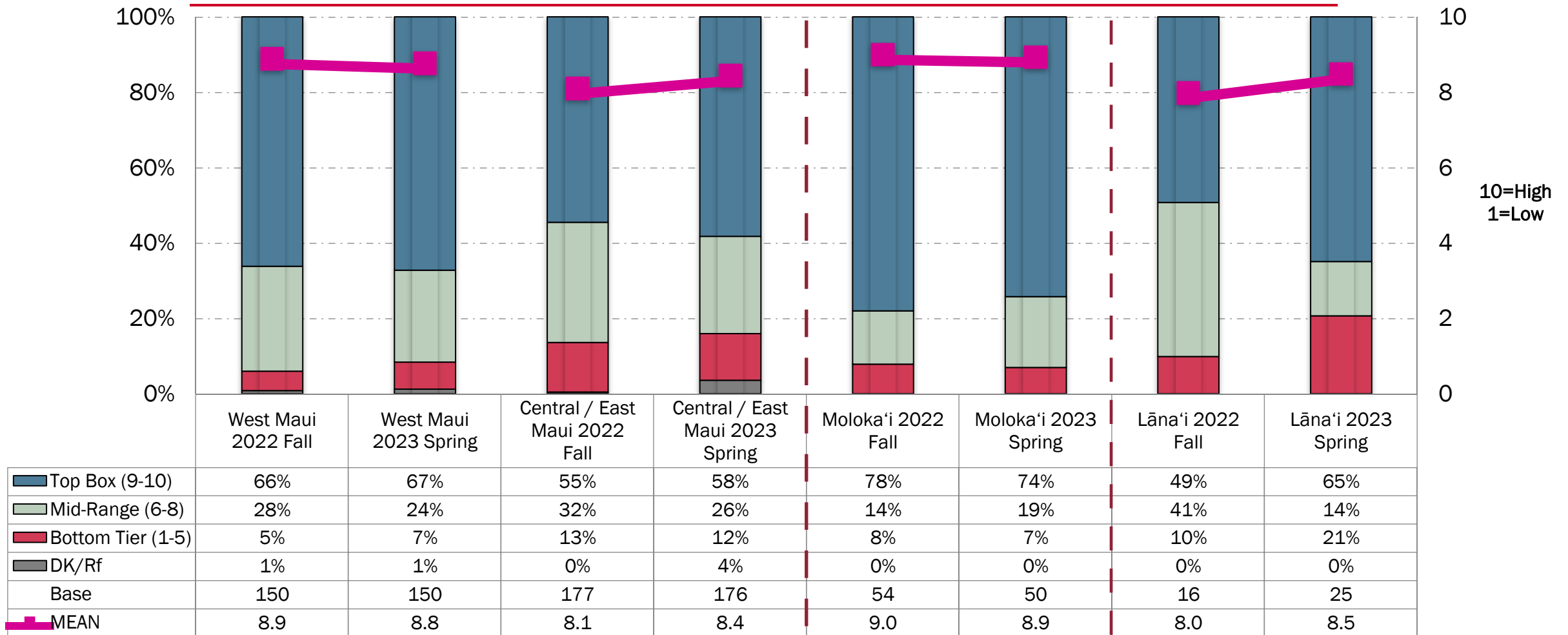


Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

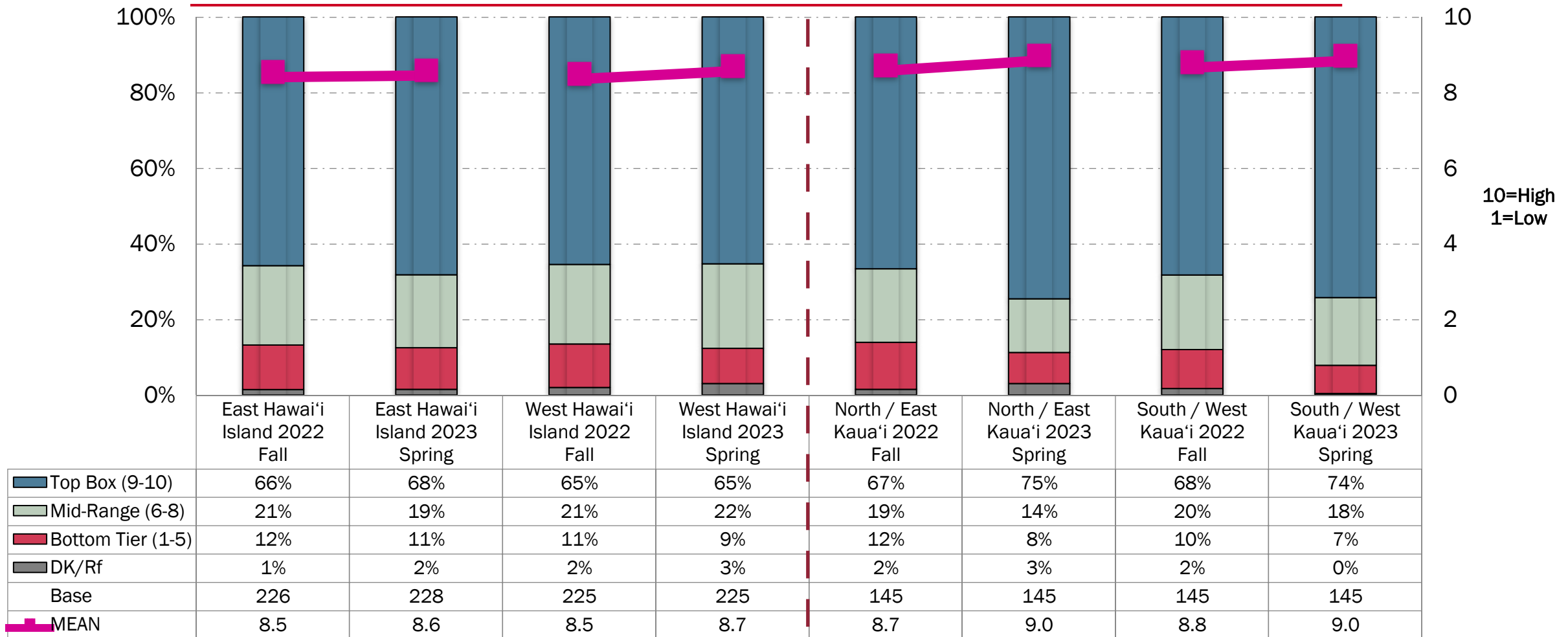
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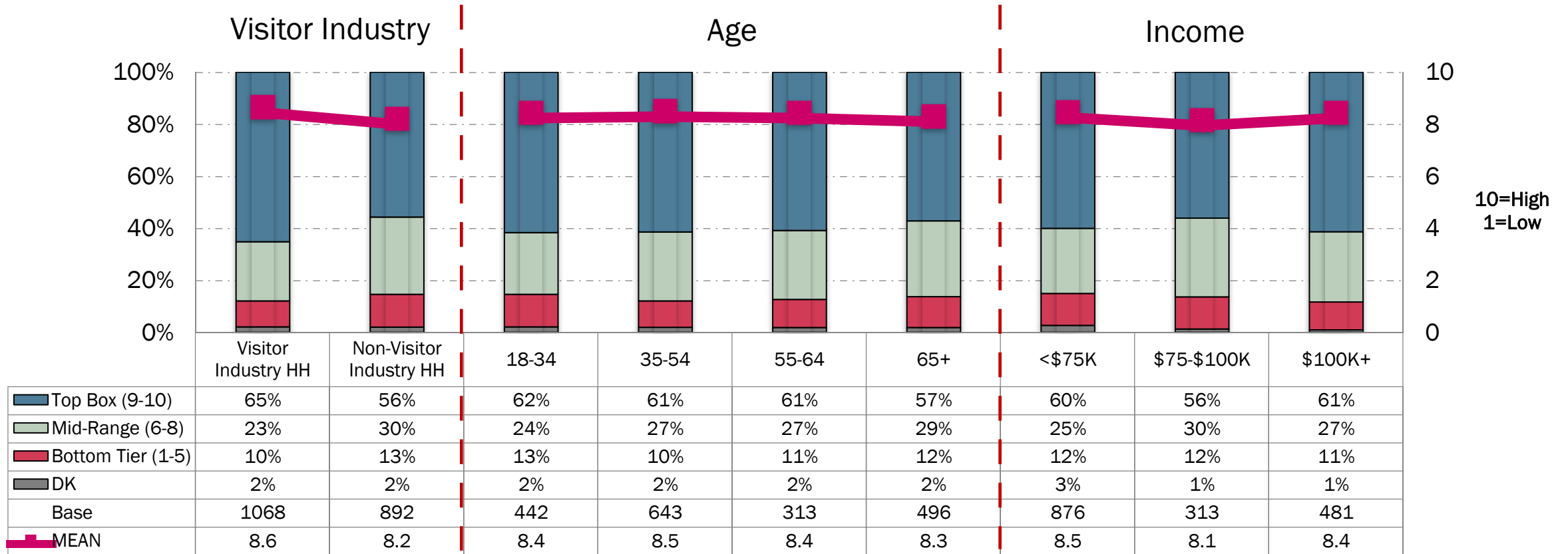
“Authentic presentation of Native Hawaiian language and culture is important” – *By Area (Maui County)*



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

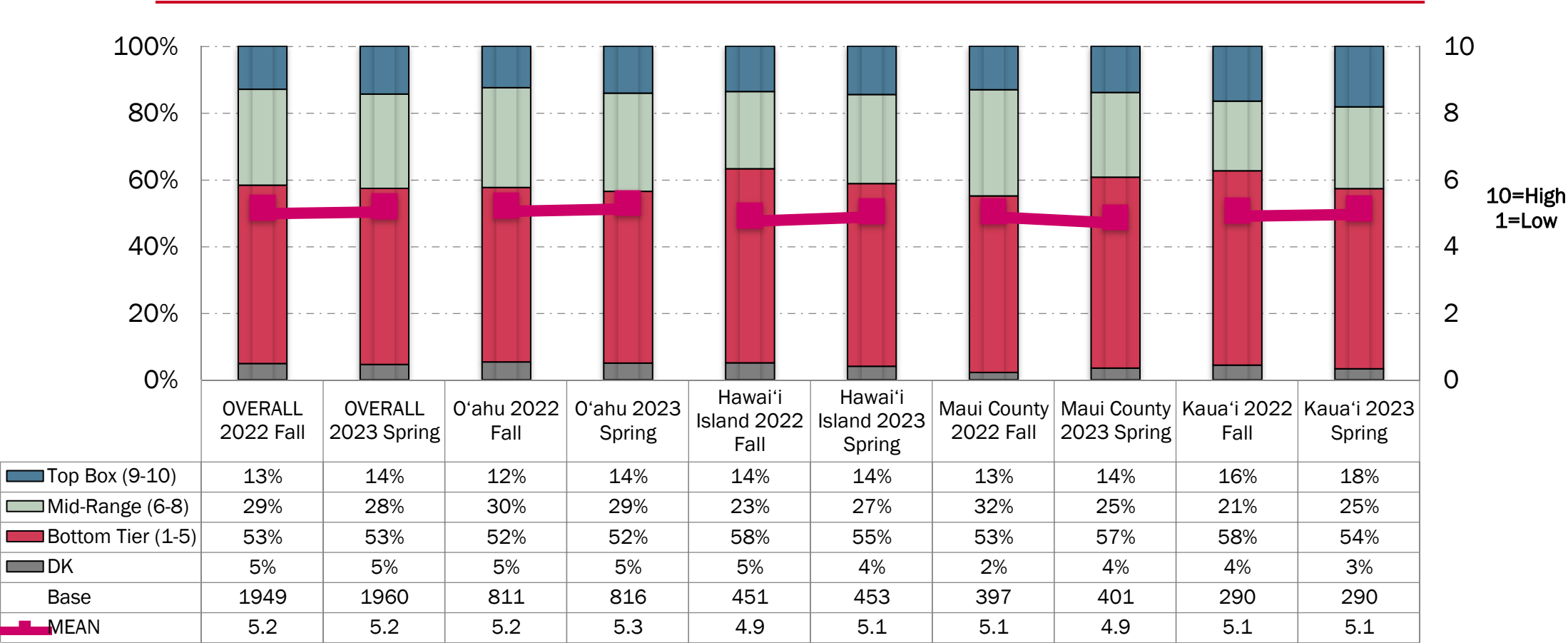


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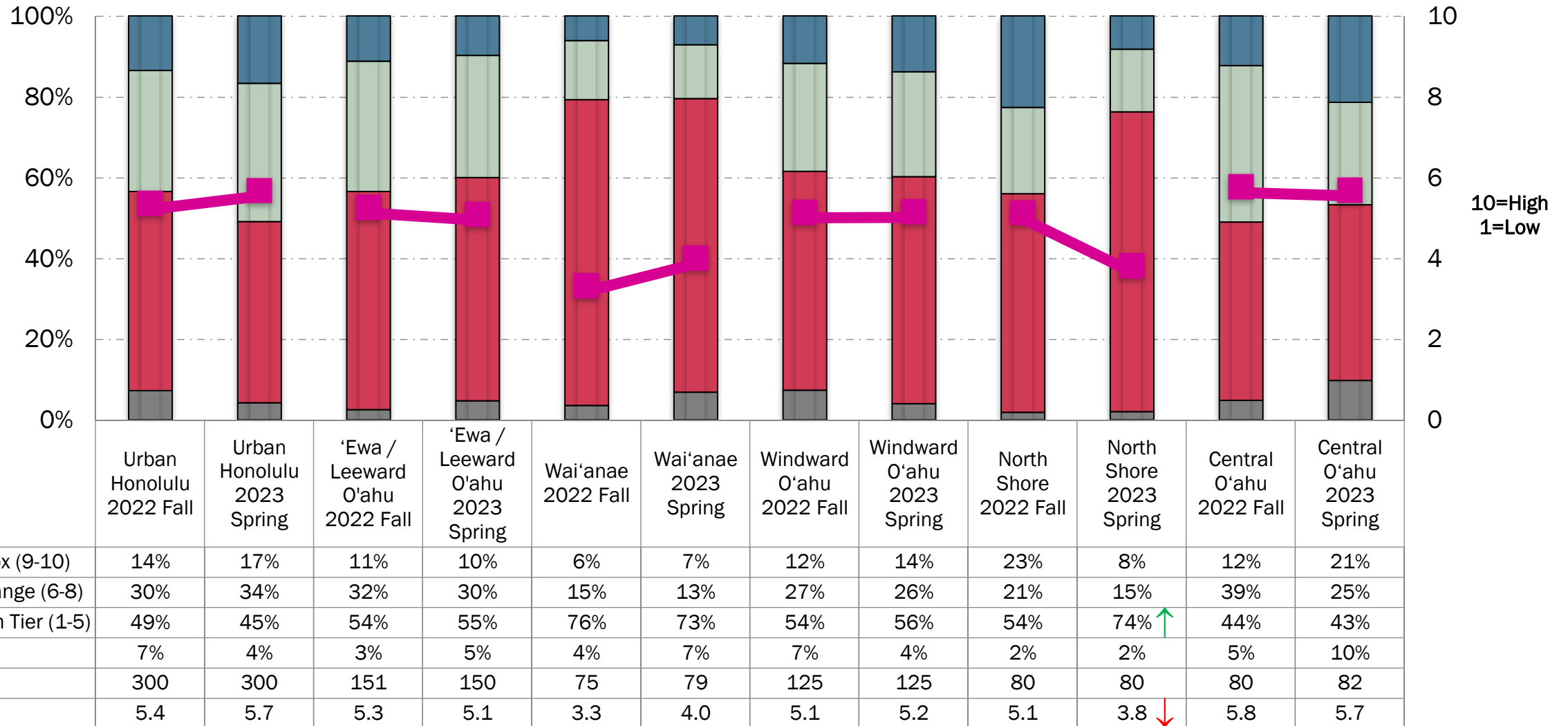
Q3.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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

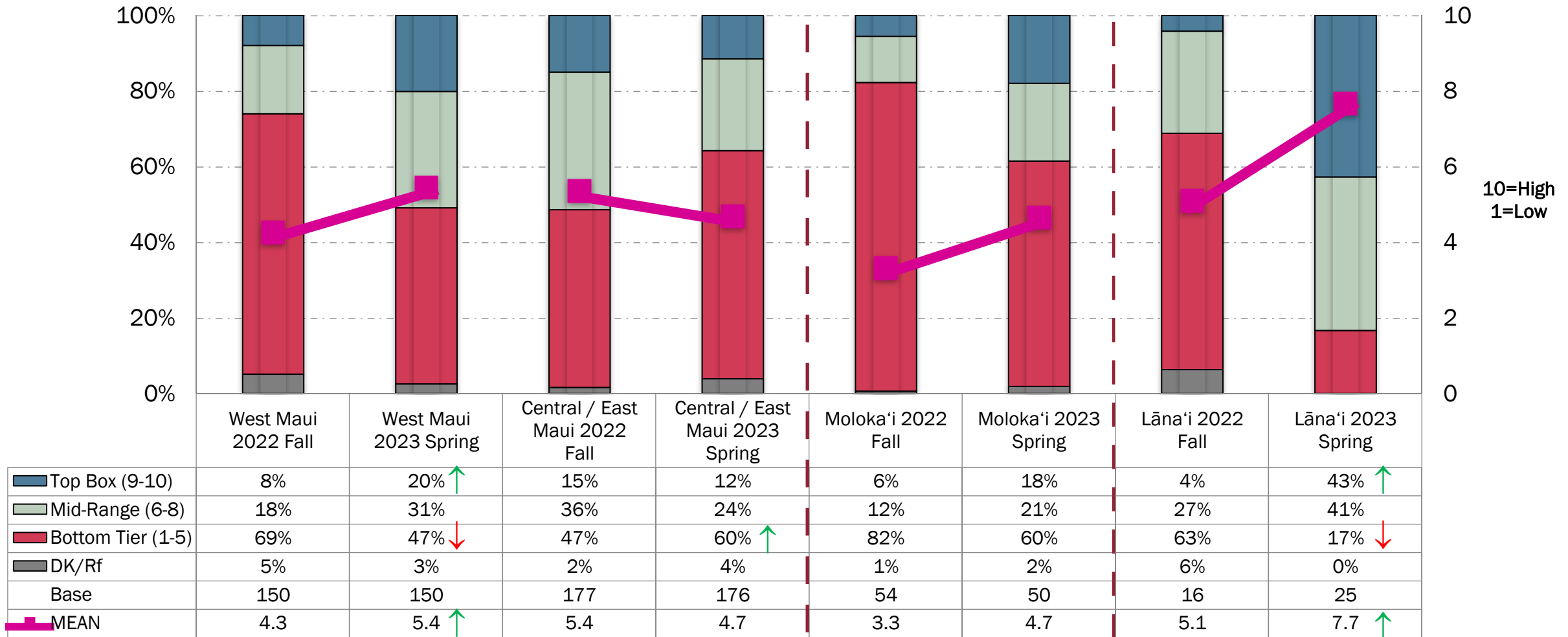


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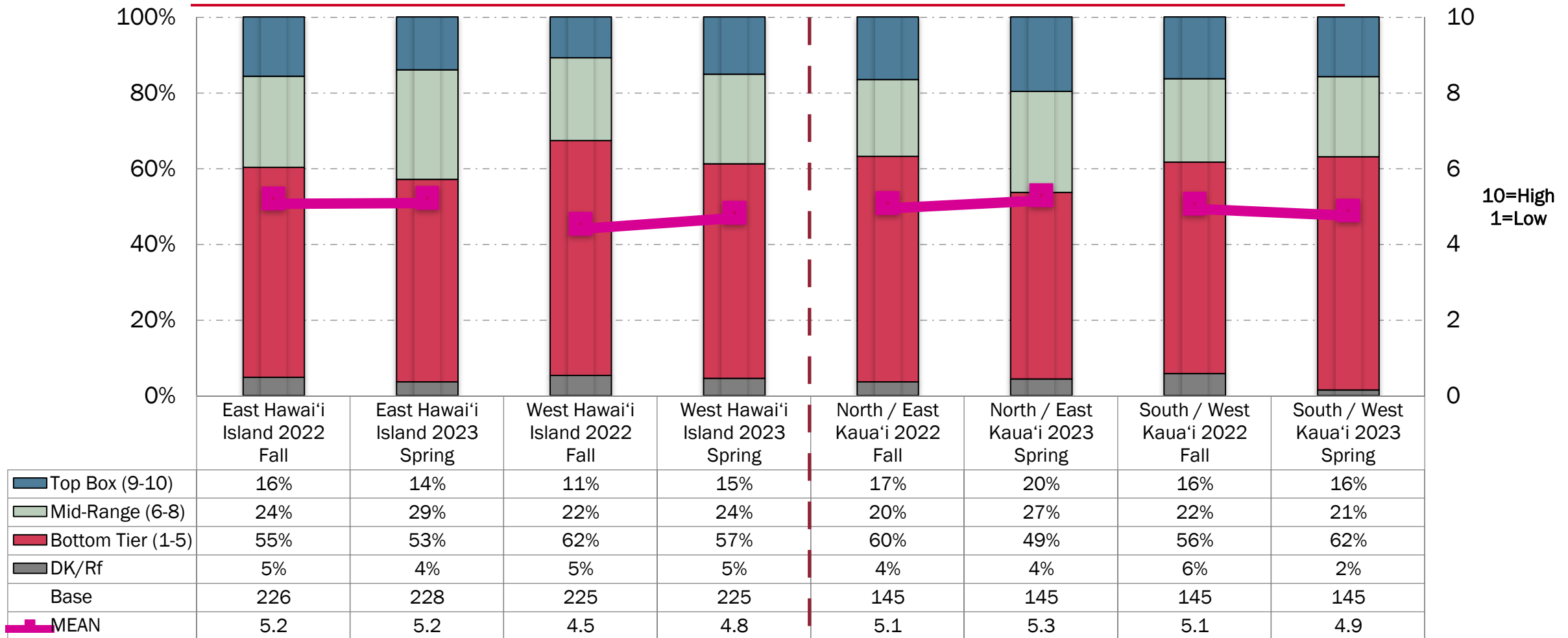
“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By Area (O‘ahu)*



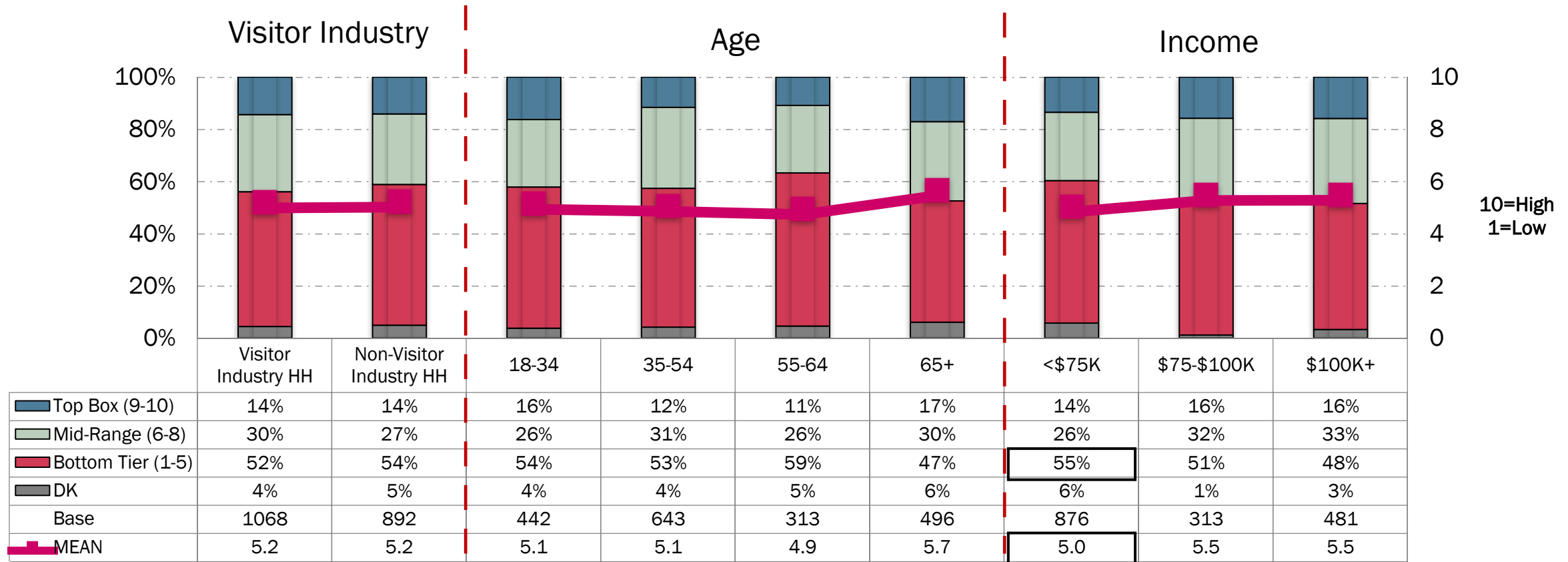
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“Tourism contributes to the perpetuation of Native Hawaiian culture and language” – *By Area (Hawai‘i Island & Kaua‘i)*

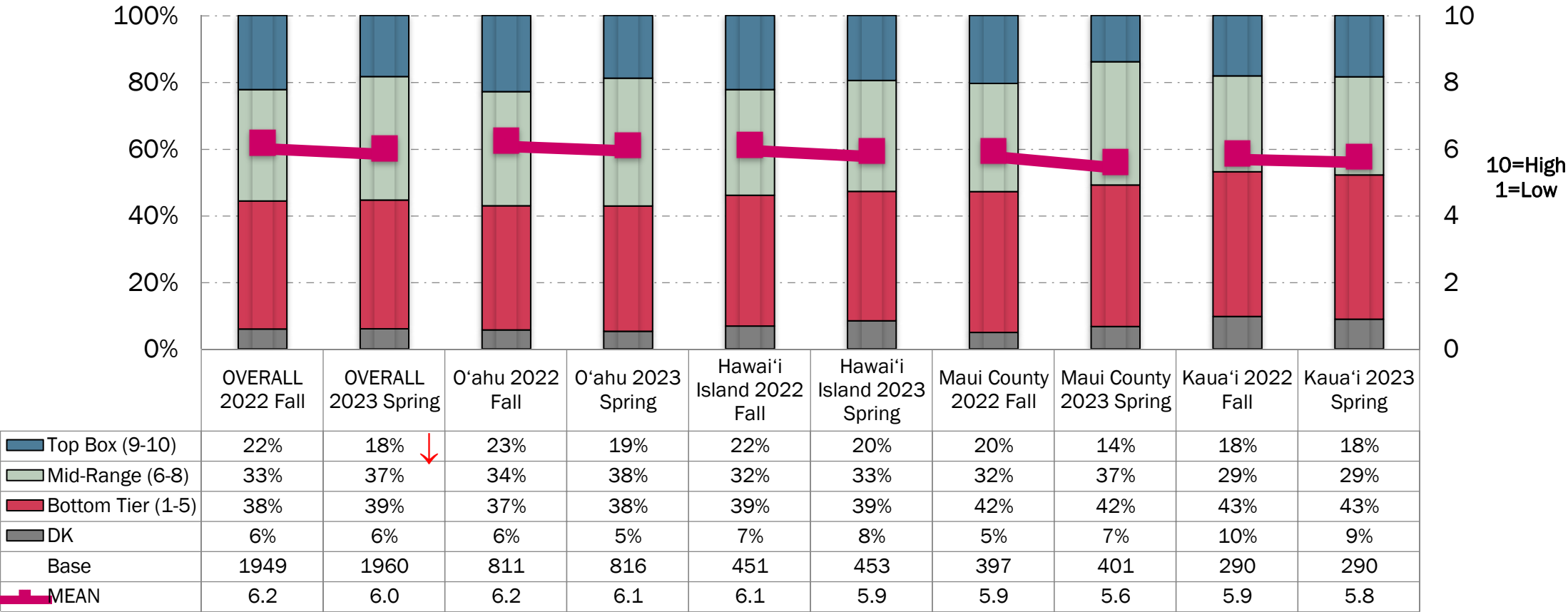


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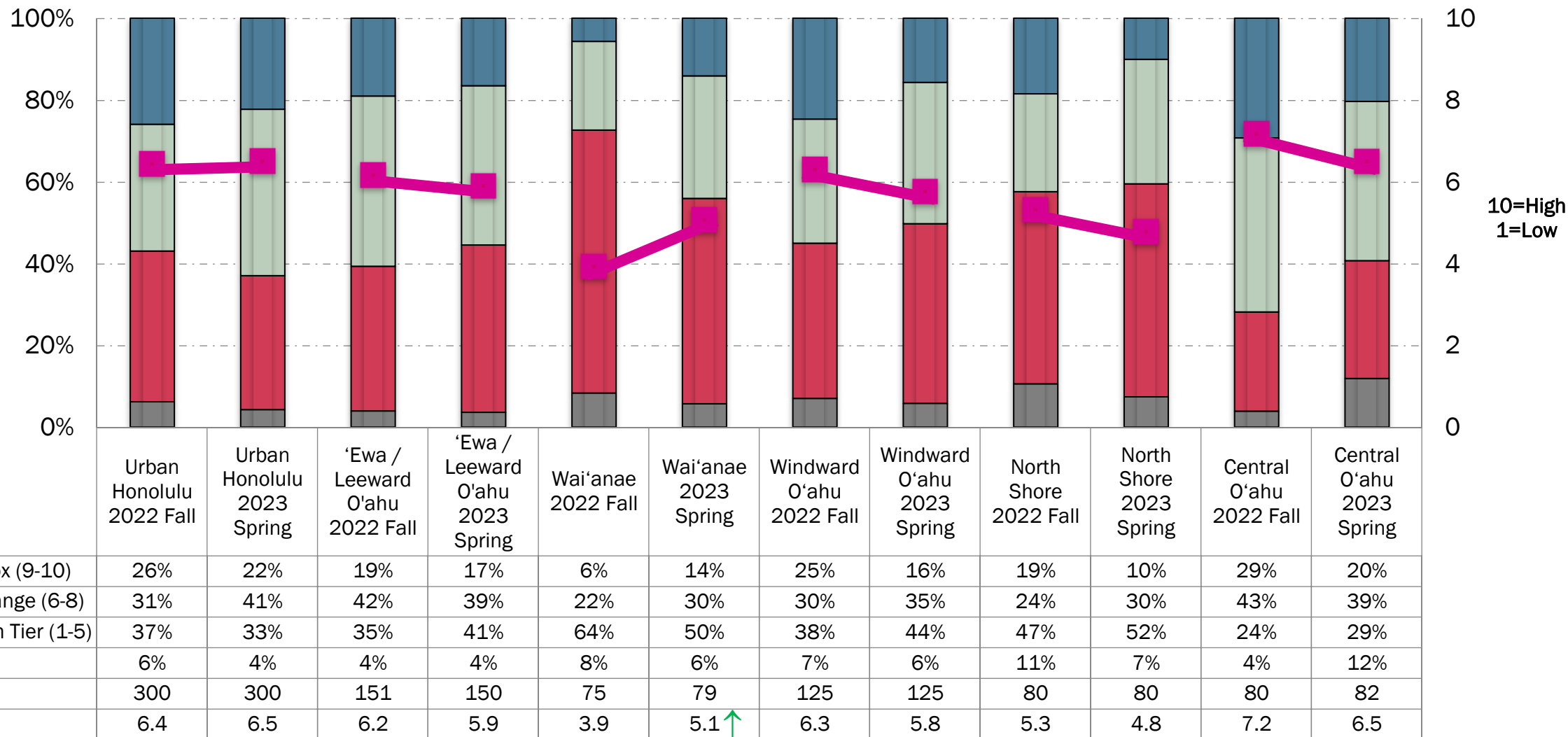
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“Tourism helps fund the stewardship of Hawai‘i’s natural resources, parks and cultural sites” – *By County*

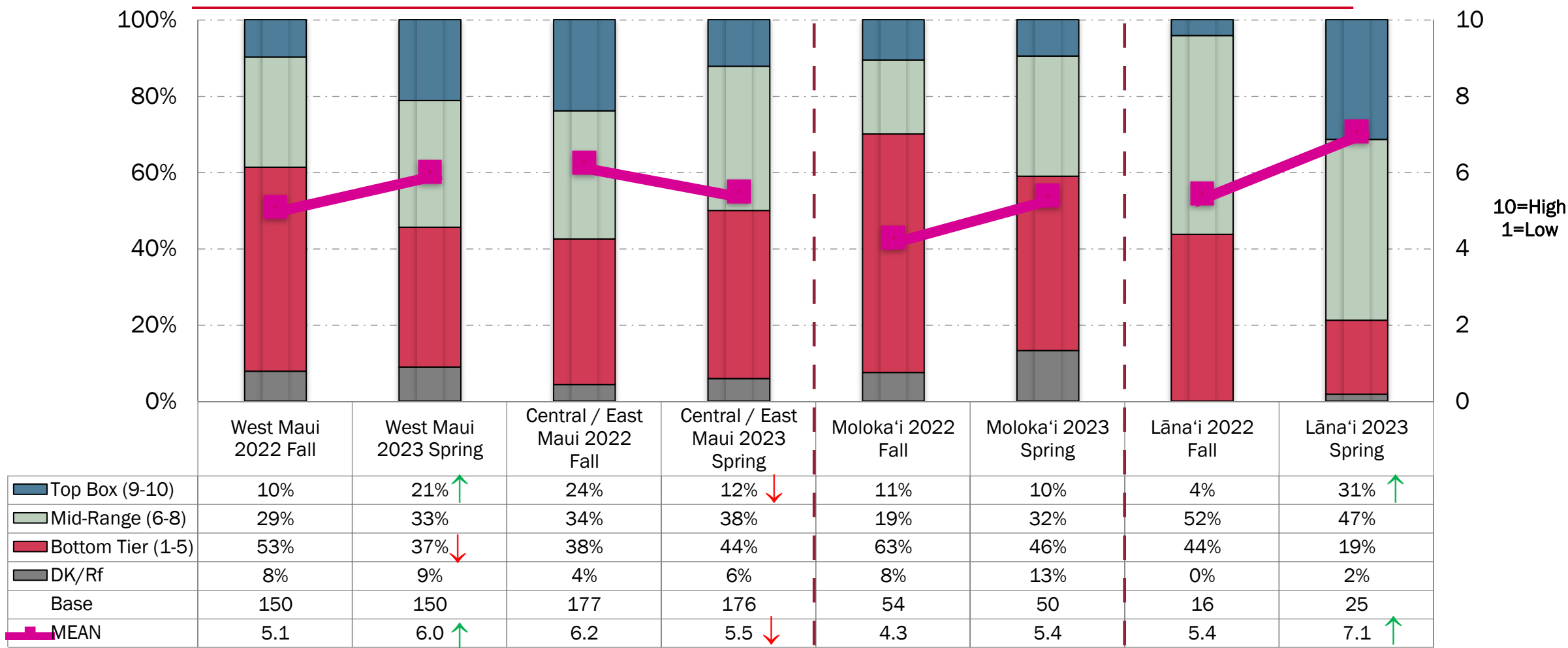


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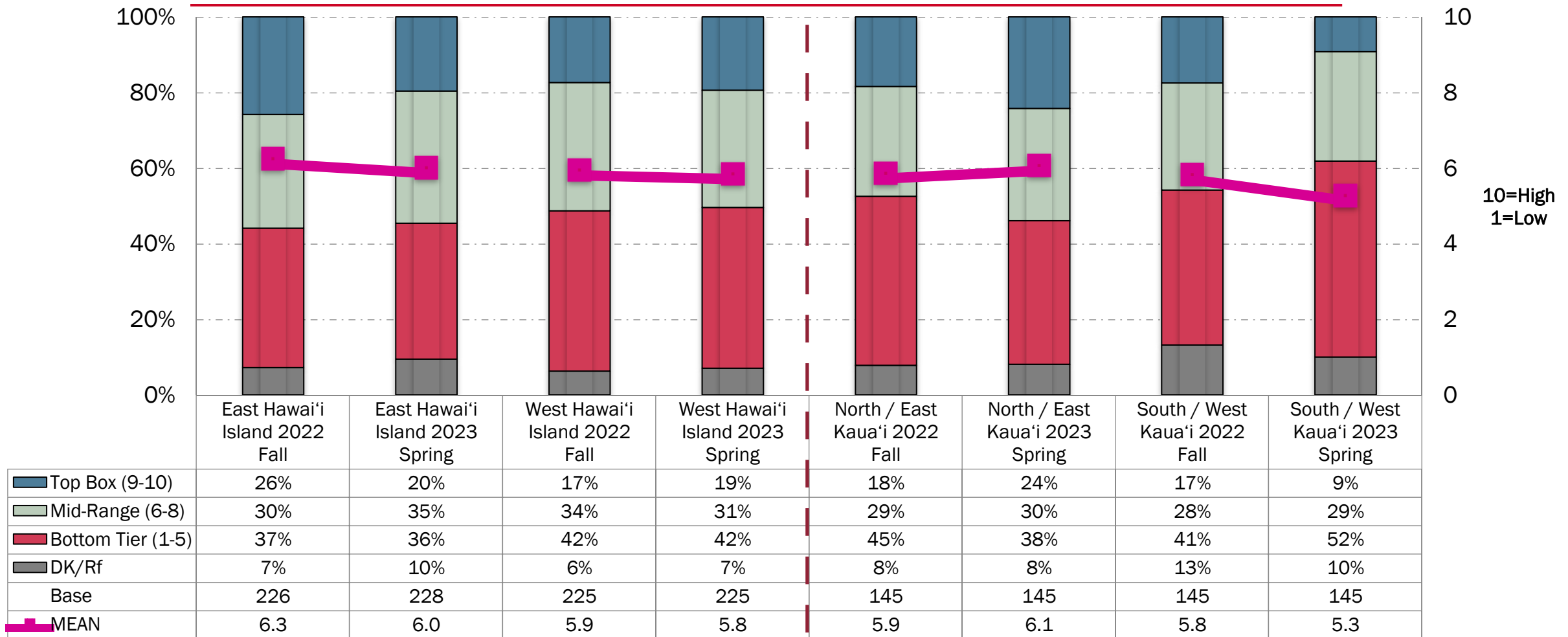
“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Area (O‘ahu)*



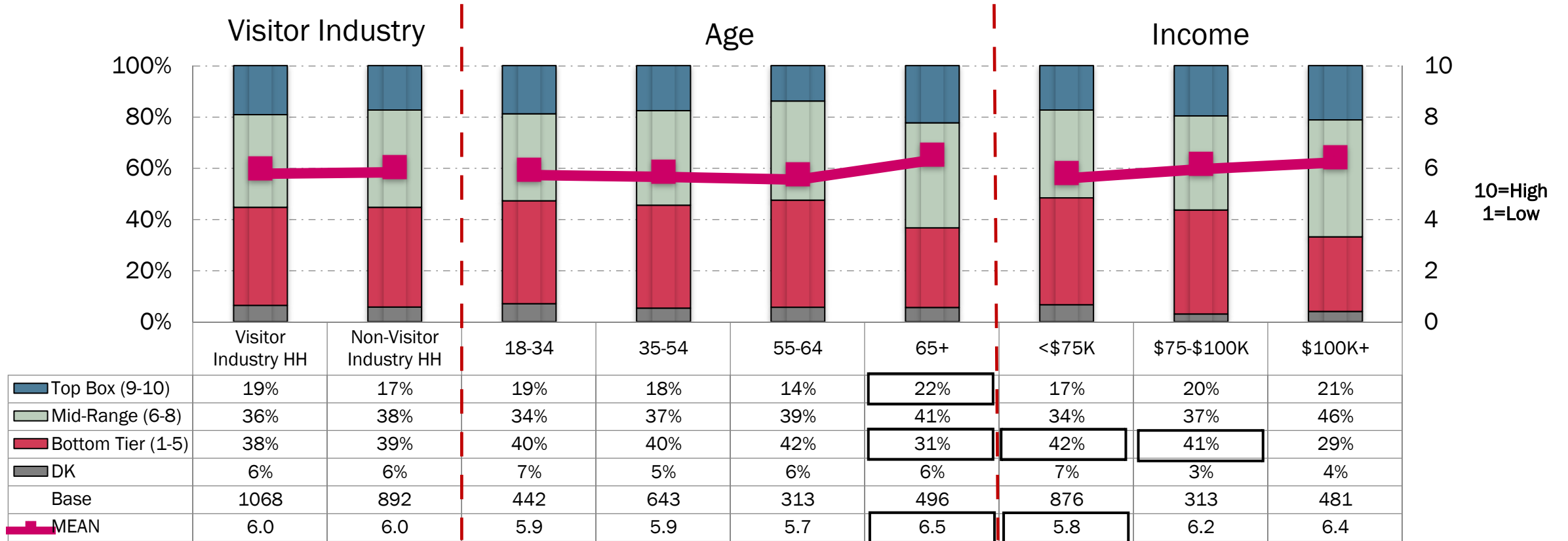
“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Area (Maui County)*



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

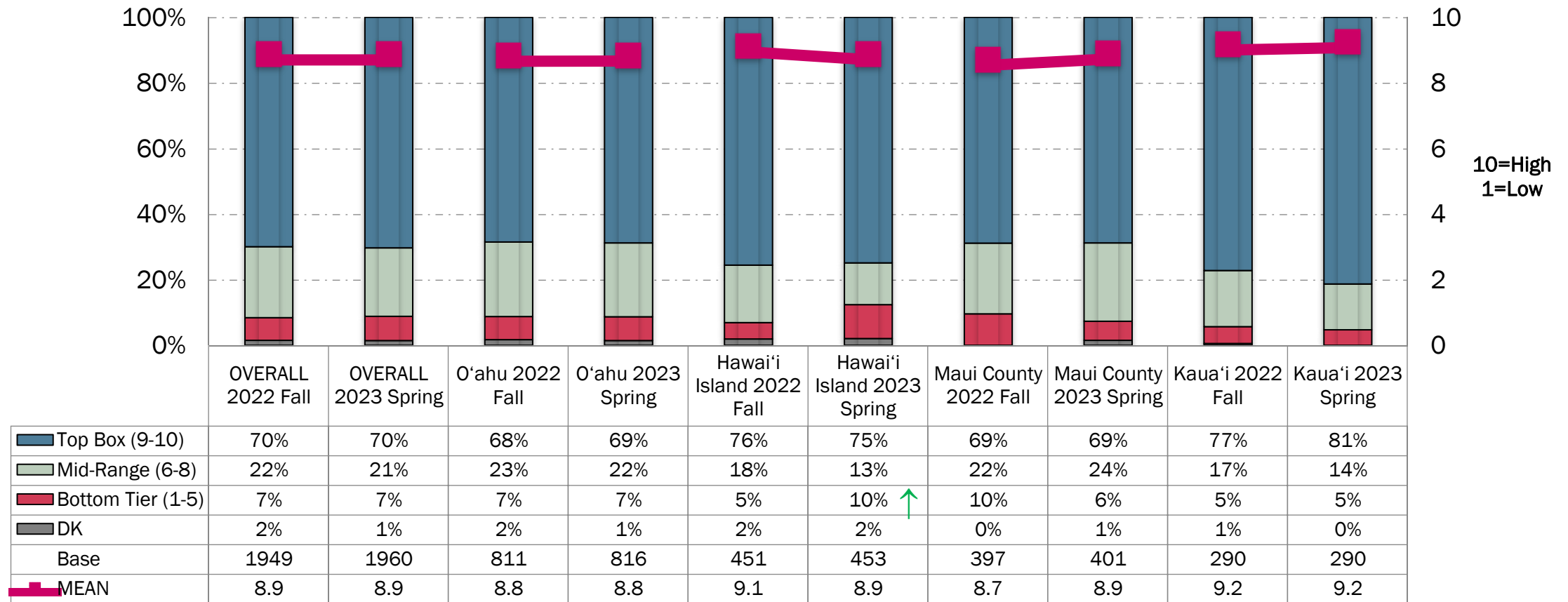


“Tourism helps fund the stewardship of Hawai‘i's natural resources, parks and cultural sites” – *By Demographics*



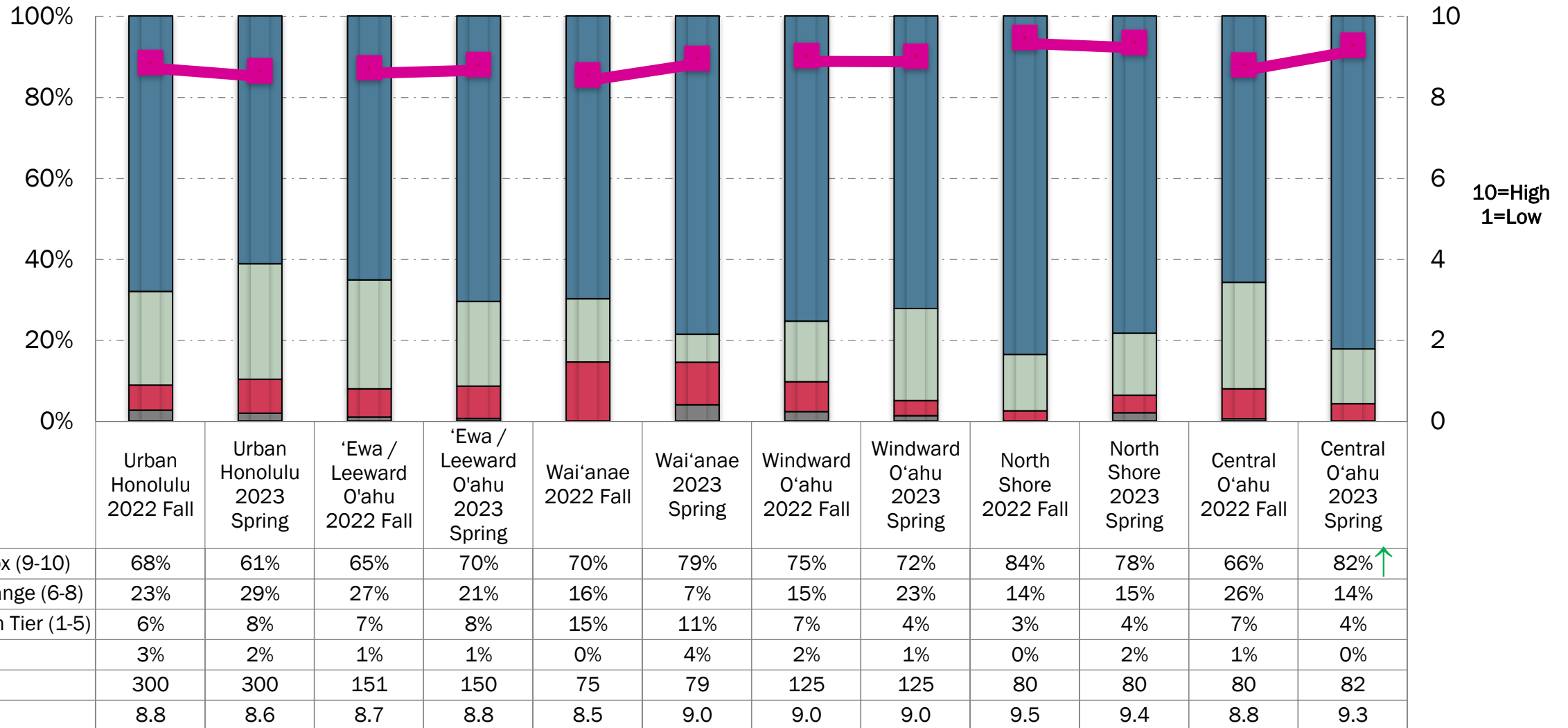
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“Visitors need to be educated about protecting Hawai‘i's natural environment and cultural resources” – *By County*

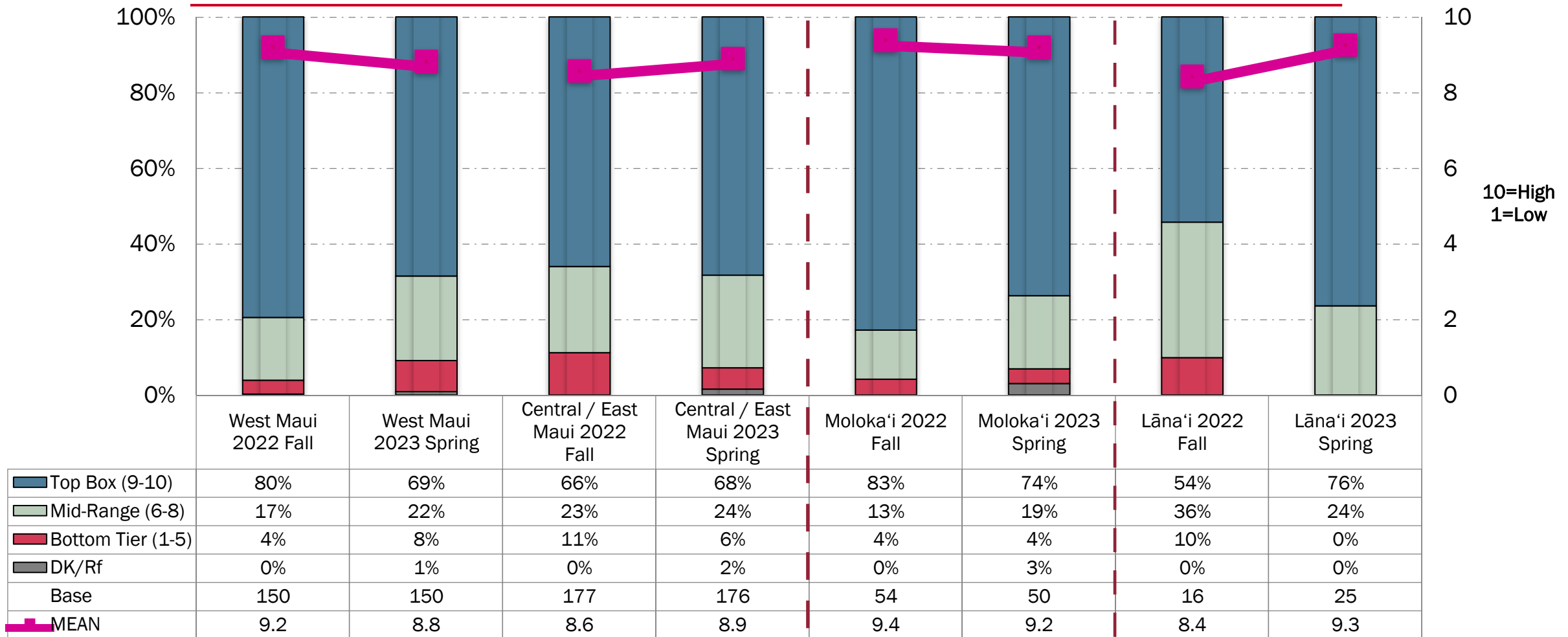


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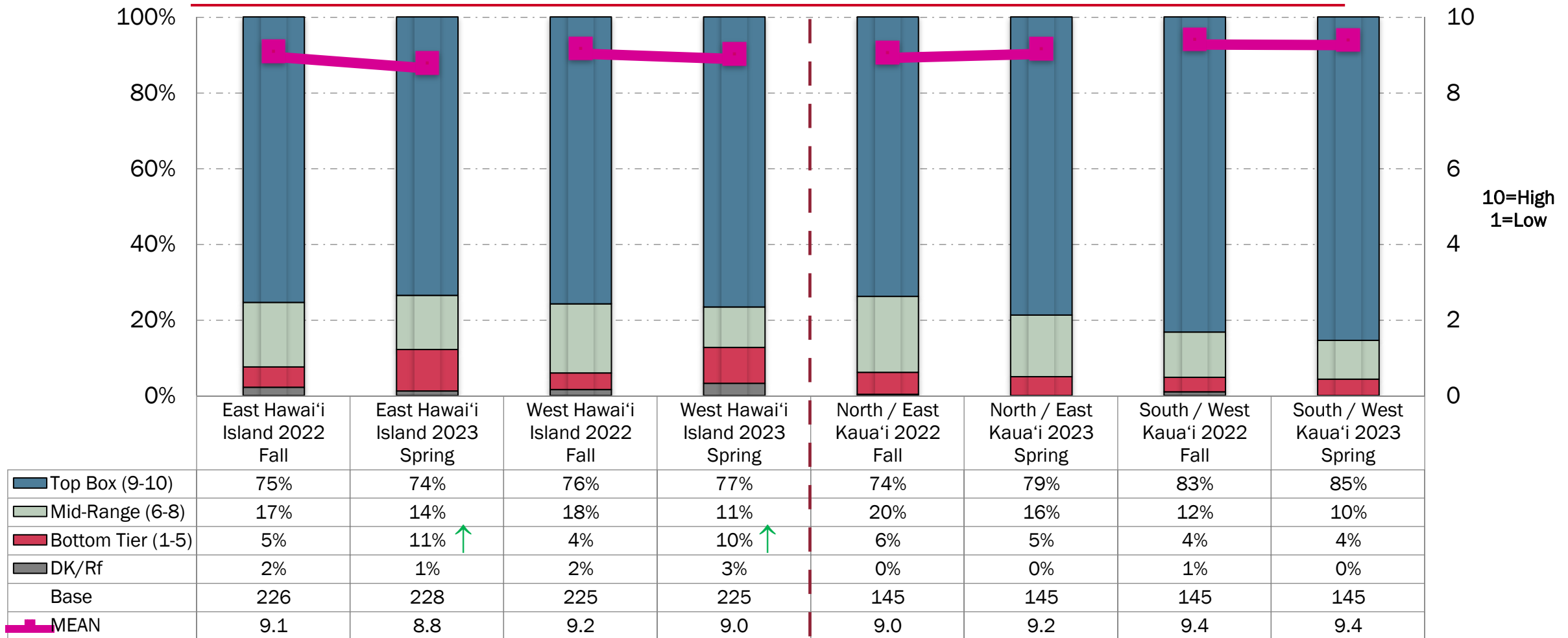
“Visitors need to be educated about protecting Hawai‘i's natural environment and cultural resources” – *By Area (O‘ahu)*



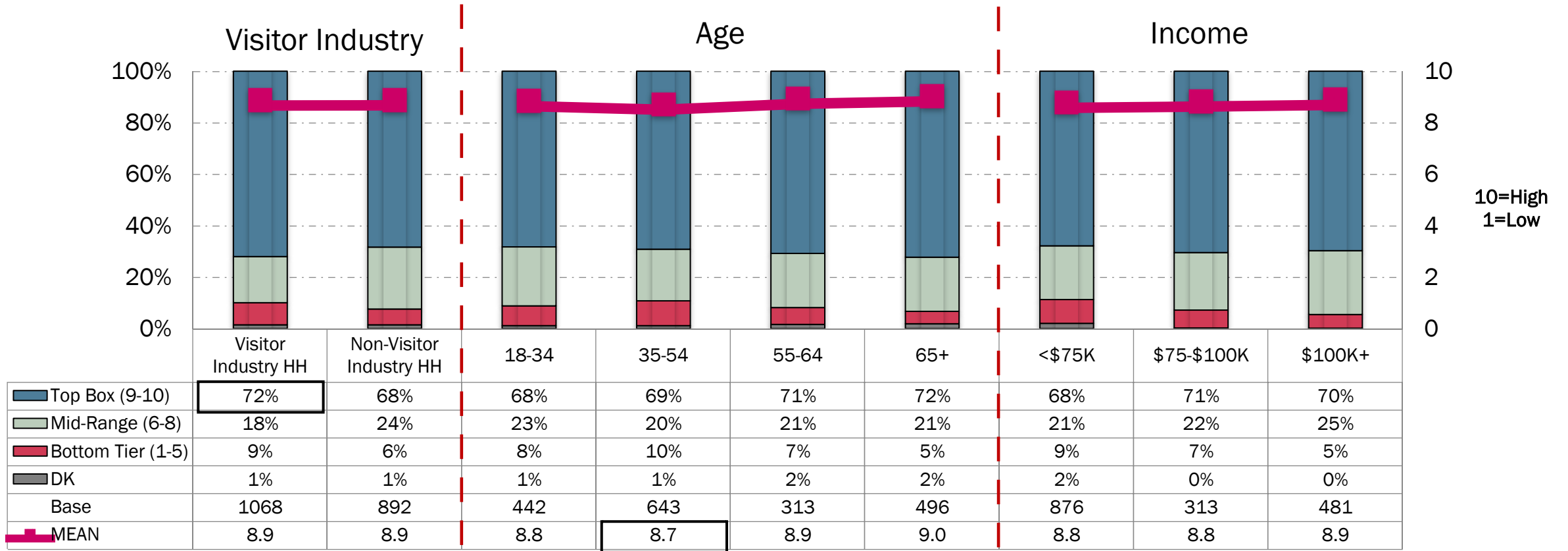
“Visitors need to be educated about protecting Hawai‘i's natural environment and cultural resources” – *By Area (Maui County)*



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

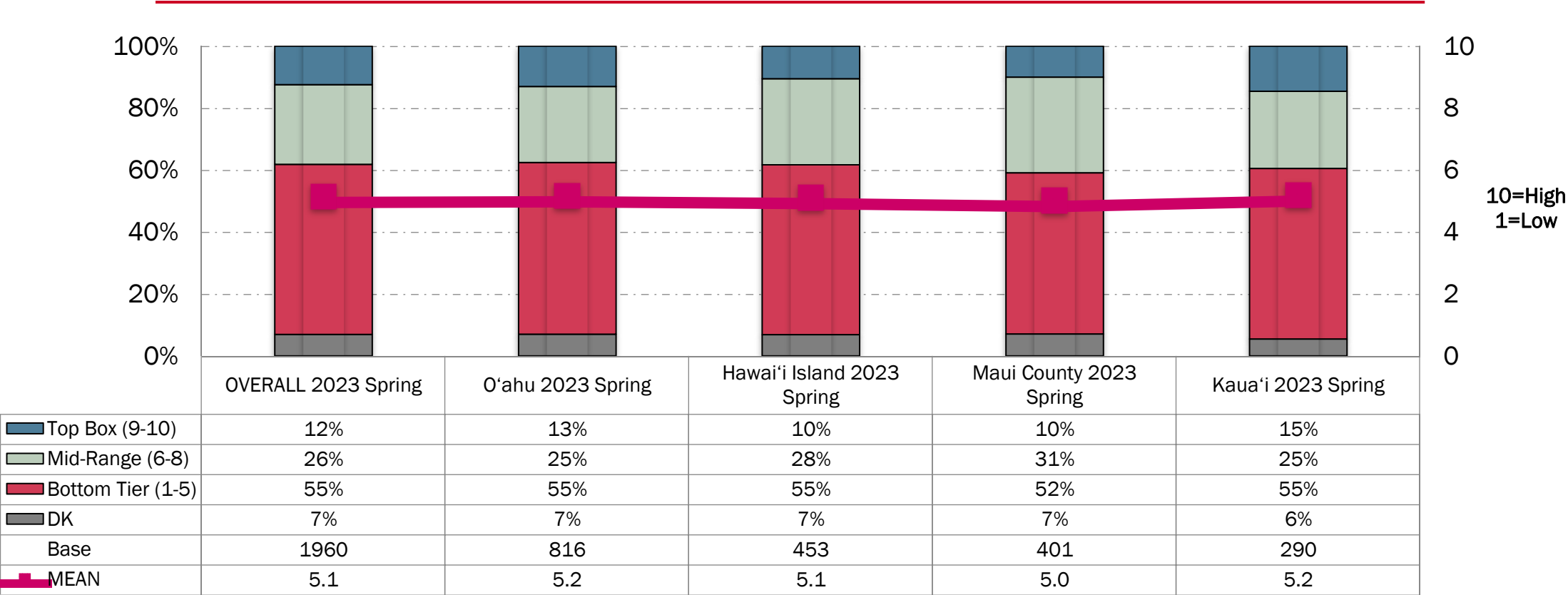


“Visitors need to be educated about protecting Hawai‘i's natural environment and cultural resources” – *By Demographics*



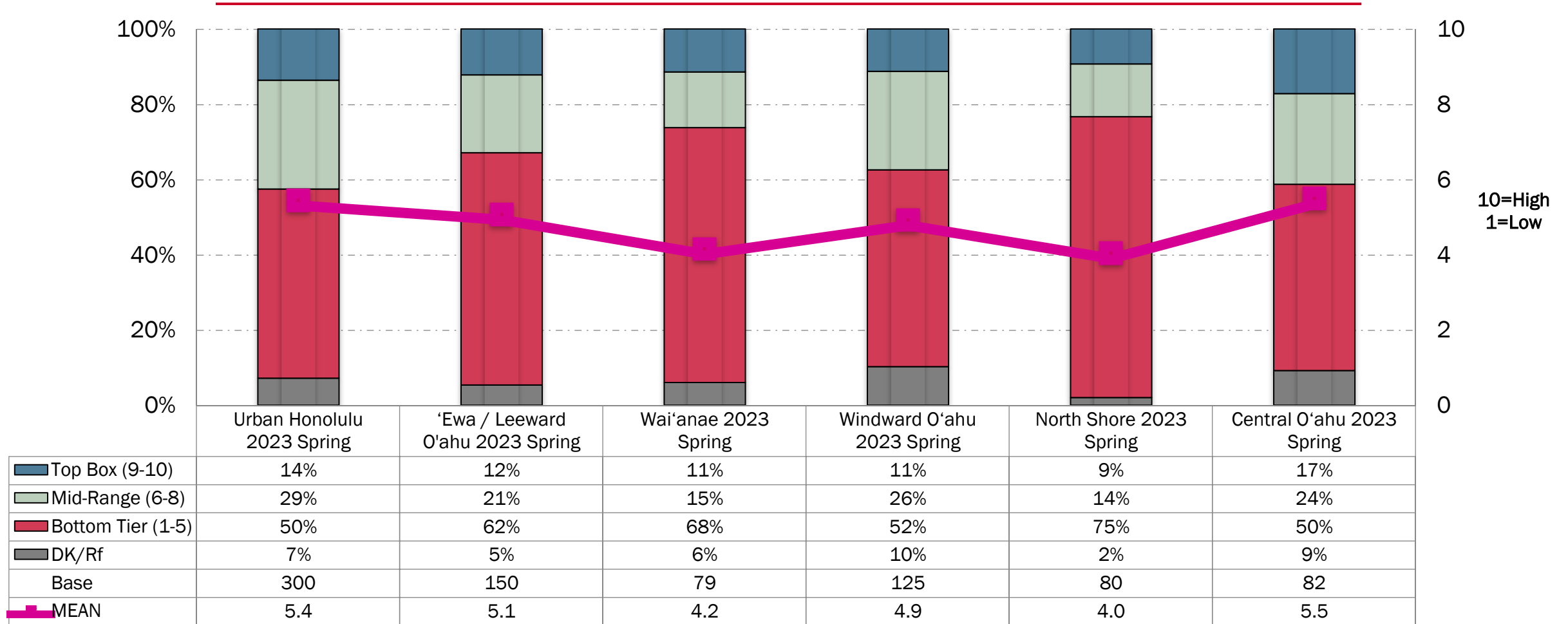
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“Natural resources in my community are being improved and better maintained” (Added Spring 2023) – *By County*



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.

“Natural resources in my community are being improved and better maintained” (Added Spring 2023) – *By Area (O‘ahu)*



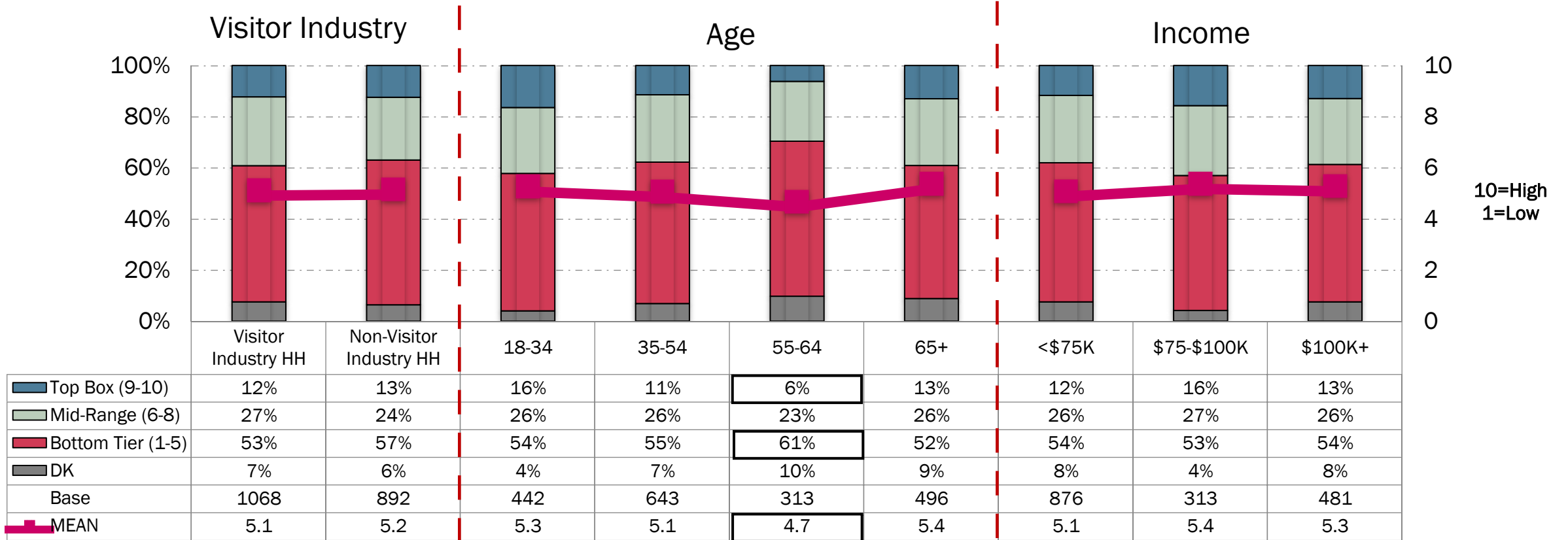
“Natural resources in my community are being improved and better maintained” (Added Spring 2023) – *By Area (Maui County)*



“Natural resources in my community are being improved and better maintained” (Added Spring 2023) – *By Area (Hawai‘i Island & Kaua‘i)*



“Natural resources in my community are being improved and better maintained” (Added Spring 2023) – *By Demographics*

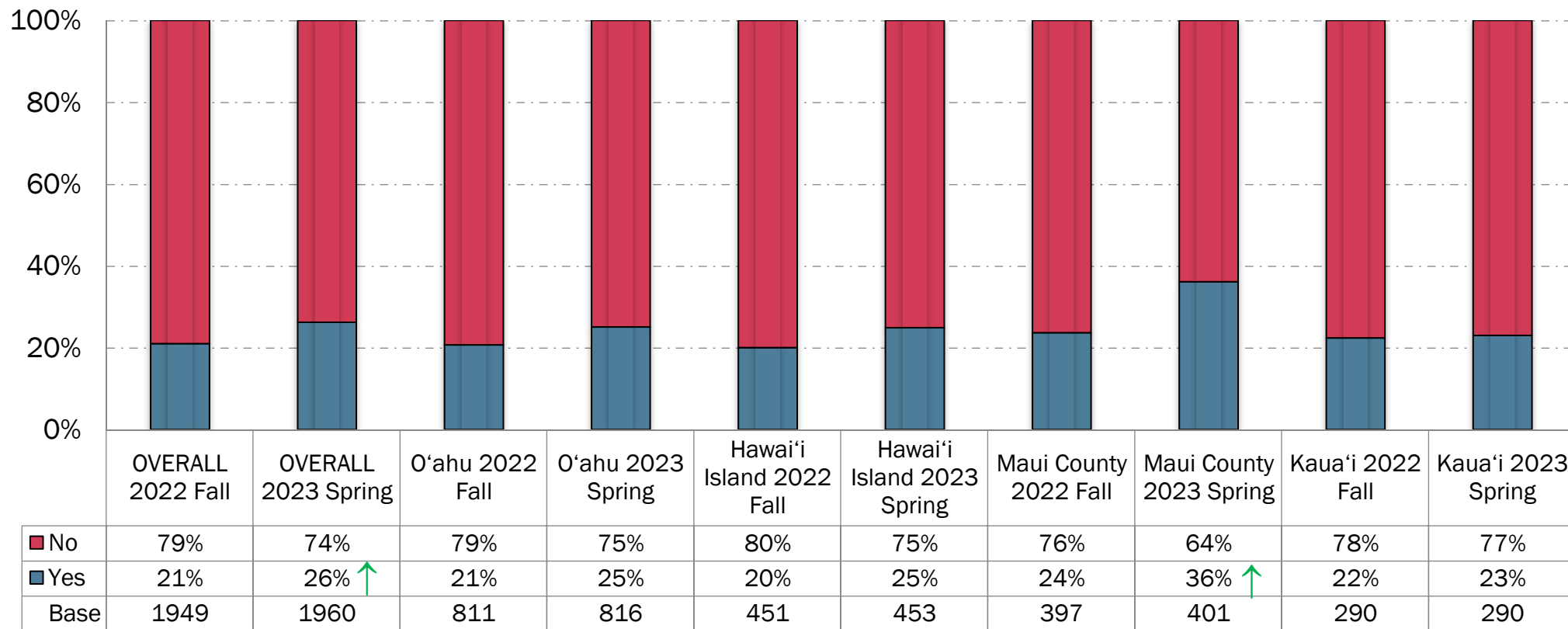


Q4.11 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



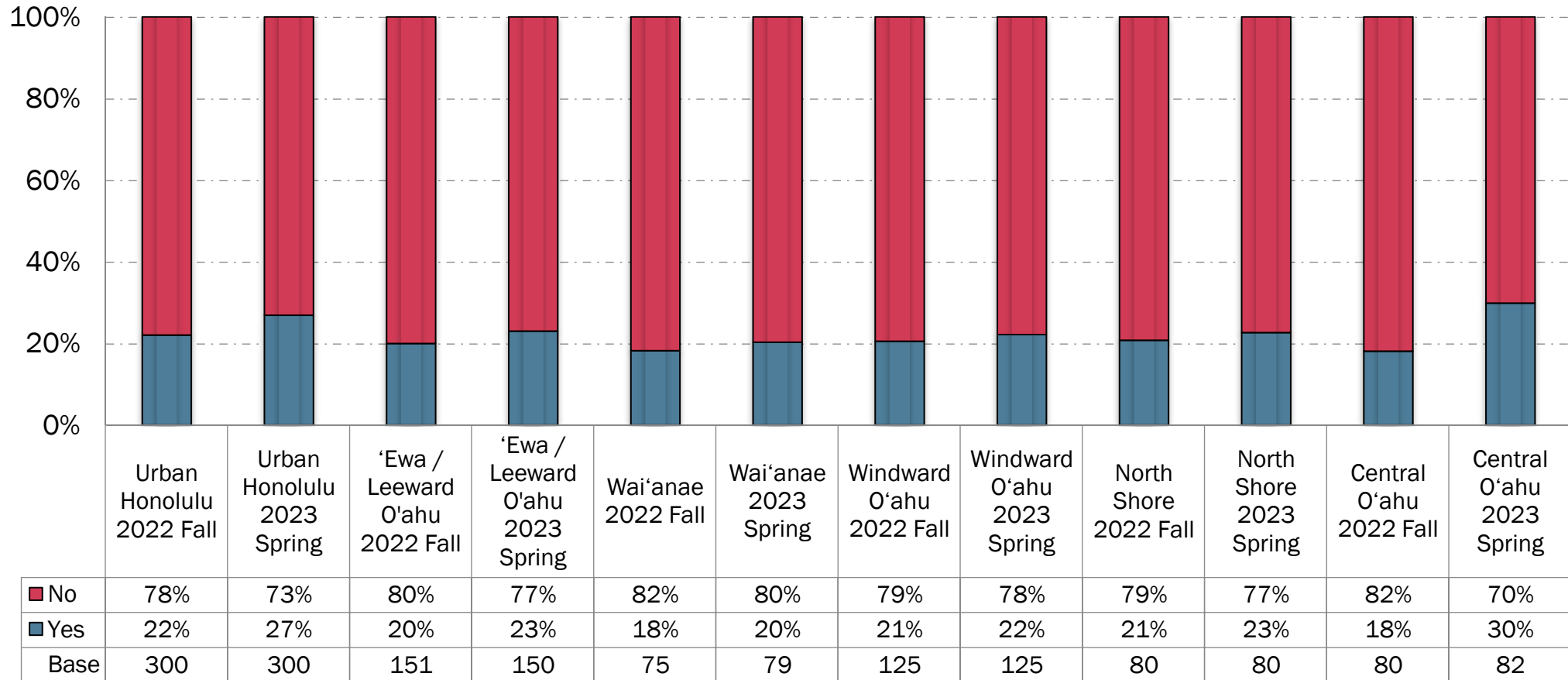
Destination Management Action Plans (Fall 2022 - Spring 2023)

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



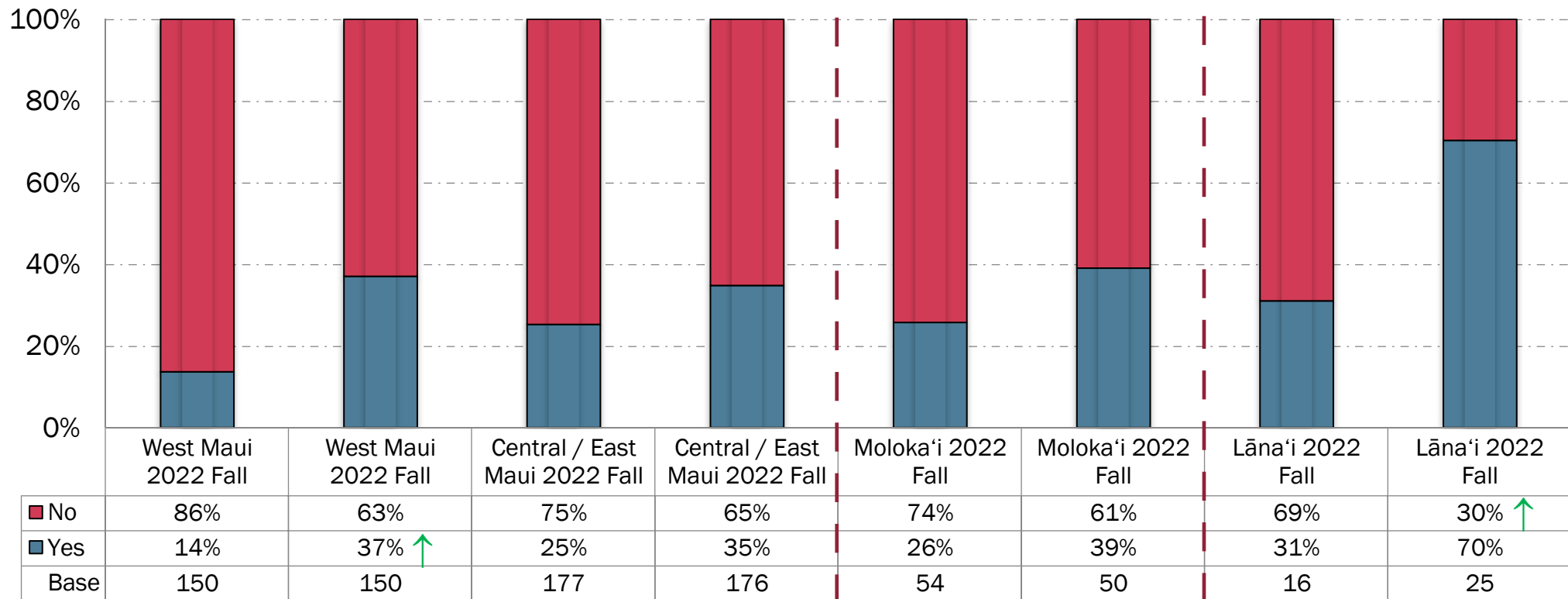
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

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



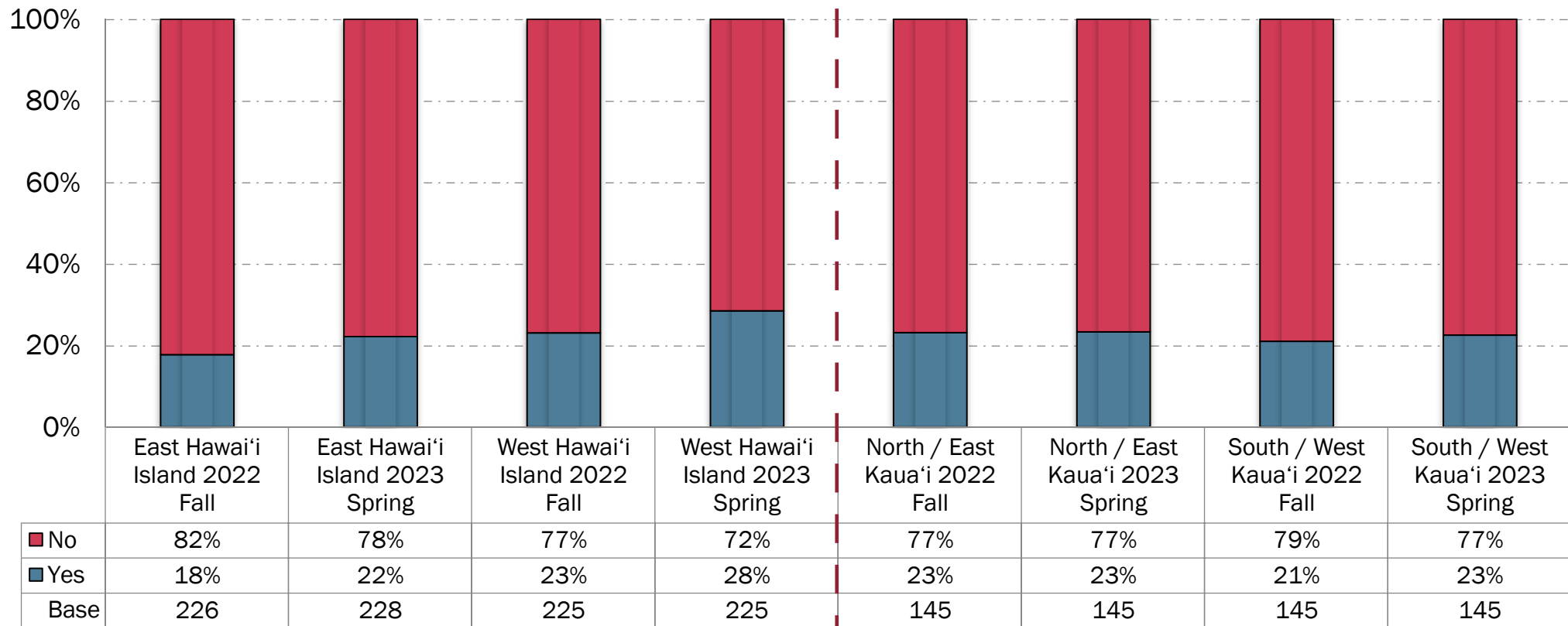
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

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



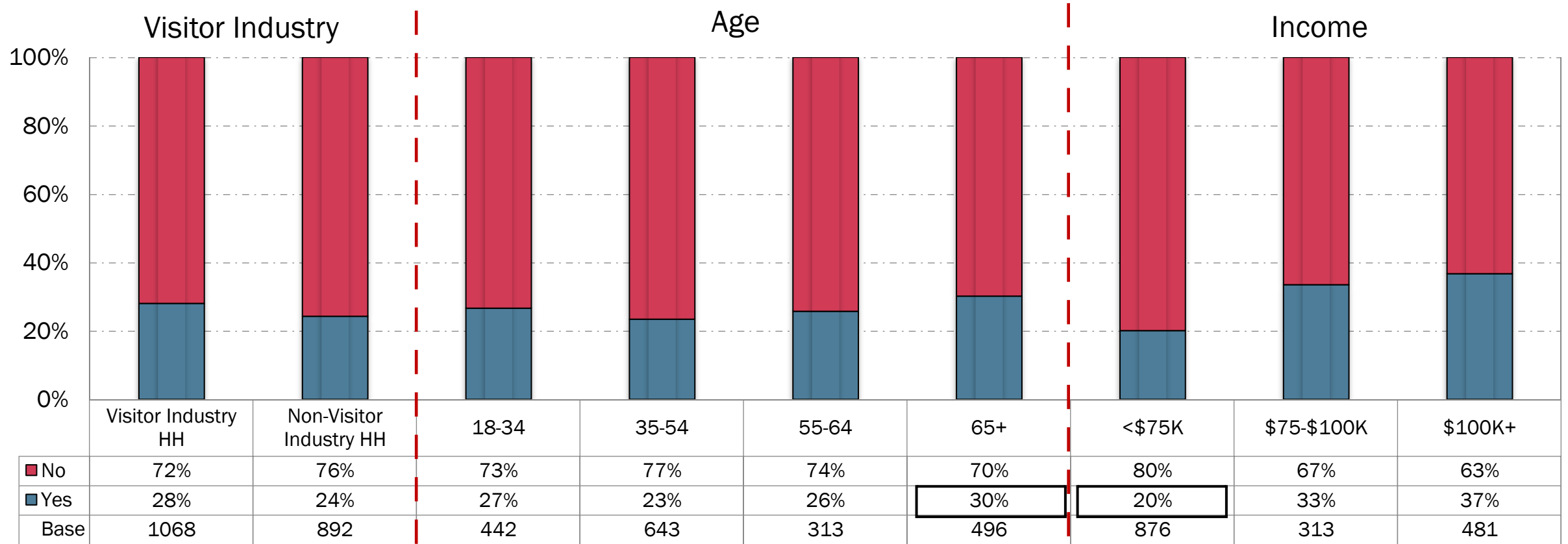
Q10. Have you heard of Hawai‘i’s “Destination Management Action Plans (DMAP),” which are the Hawai‘i Tourism Authority’s efforts to better manage tourism in our state?

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



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

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



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



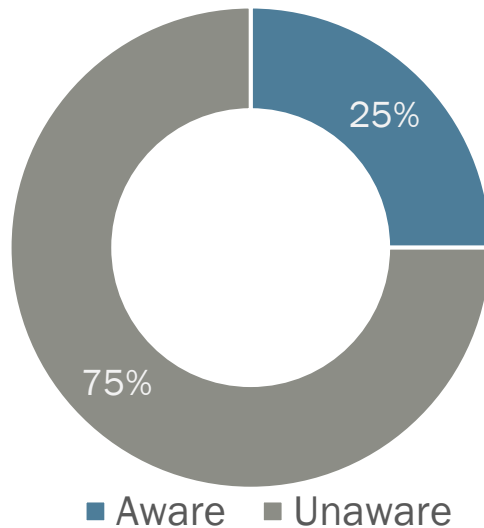
Hawai'i Tourism Authority's Destination Management Action Plan: O'ahu (Fall 2022 - Spring 2023)

Destination Management Action Plans Awareness: O‘ahu

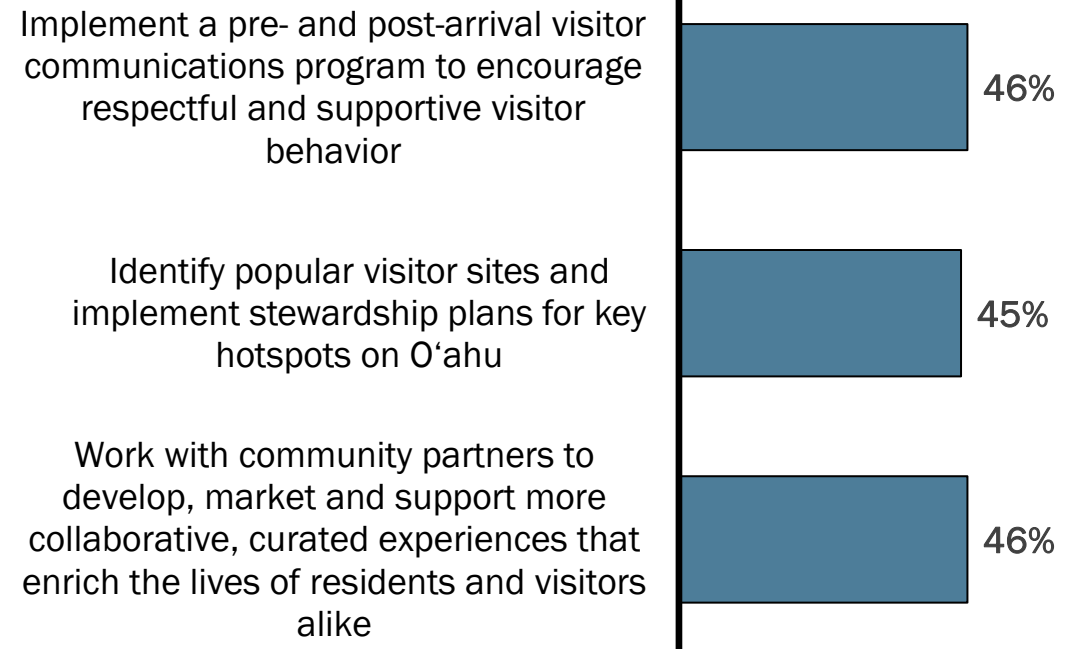
In Spring 2023, awareness of HTA’s Destination Management Action Plans rose to 25 percent, a 4-point improvement from the previous period. Recognition of individual plan initiatives such as pre-/post-arrival communications, identifying sites for stewardship, and collaborating with community partners garnered higher recognition with 60 percent aware of at least one plan.

% Aware of HTA Destination Management Action Plans

▲ 4-point improvement from Fall 2022



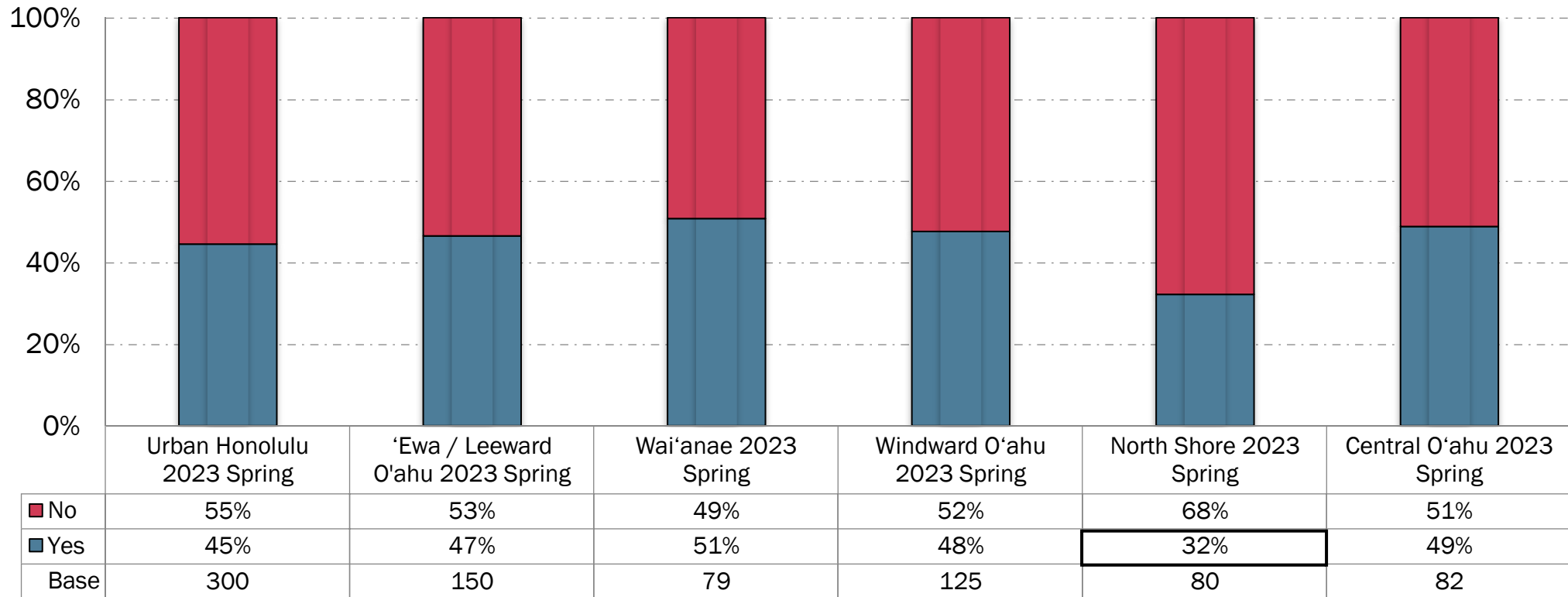
ALL O‘ahu residents: 60% are aware of at least one plan



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: 816)

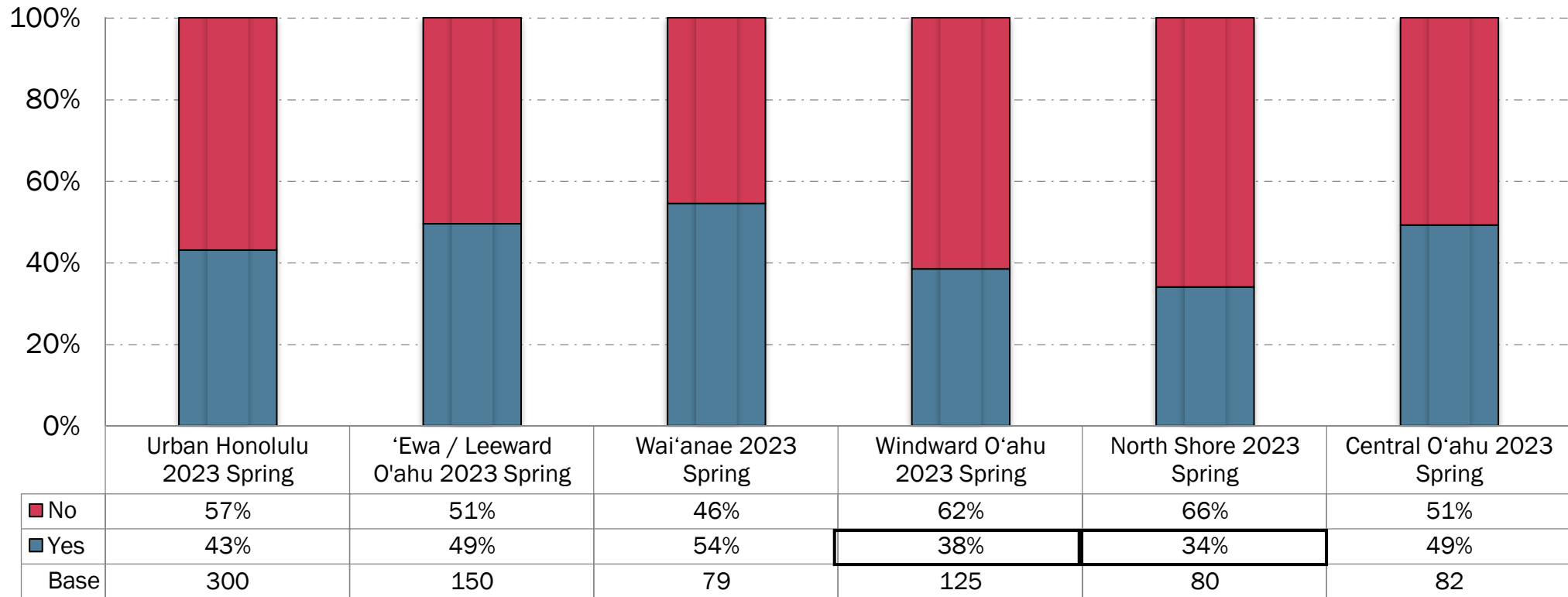
Q10a. I’m going to read you a brief list of actions included in the Hawai‘i Tourism Authority’s Destination Management Action Plan for INSERT ISLAND]. Are you aware that the HTA is working to: (Base: 816)

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



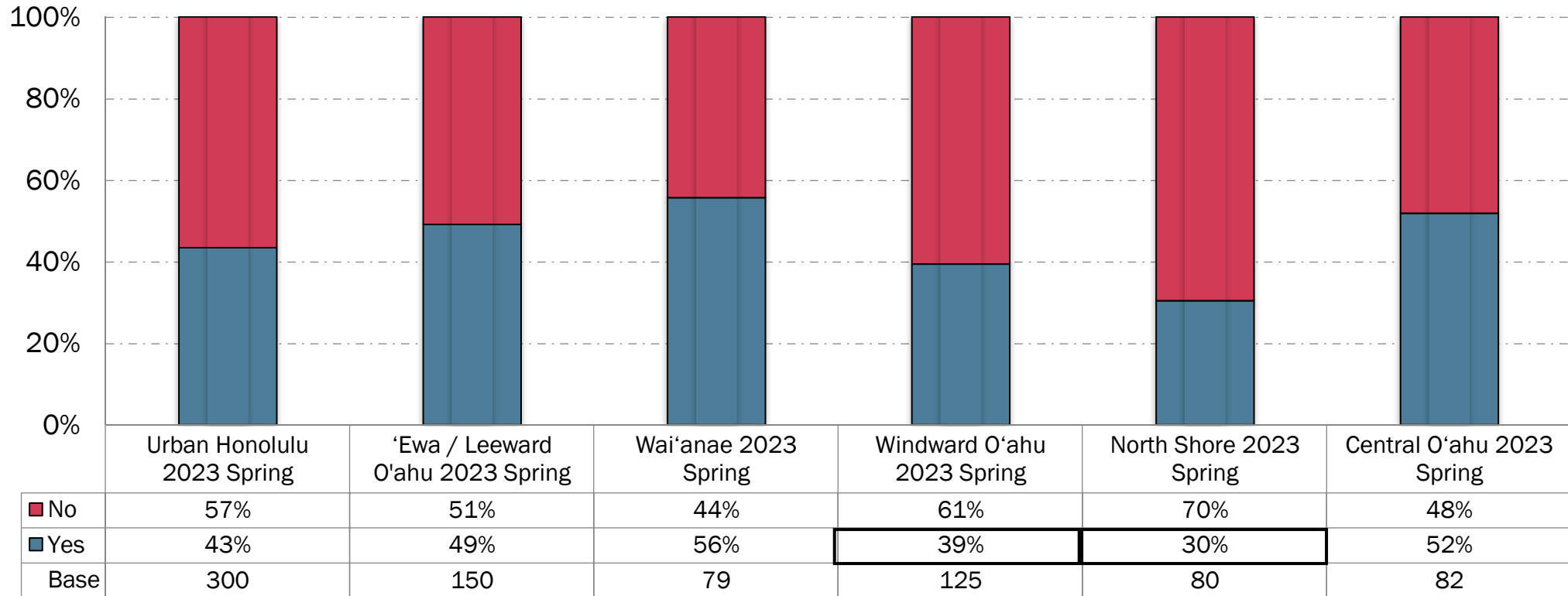
Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



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

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



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

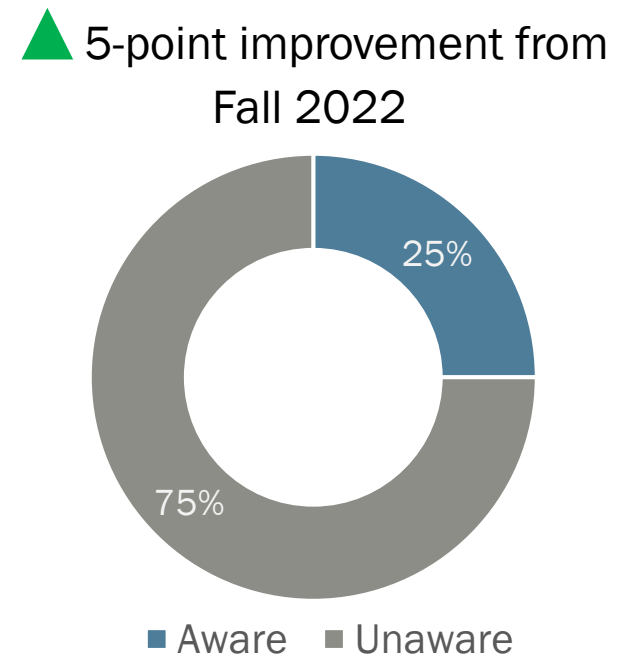


Hawai‘i Tourism Authority’s Destination Management Action Plan: Hawai‘i Island (Fall 2022 - Spring 2023)

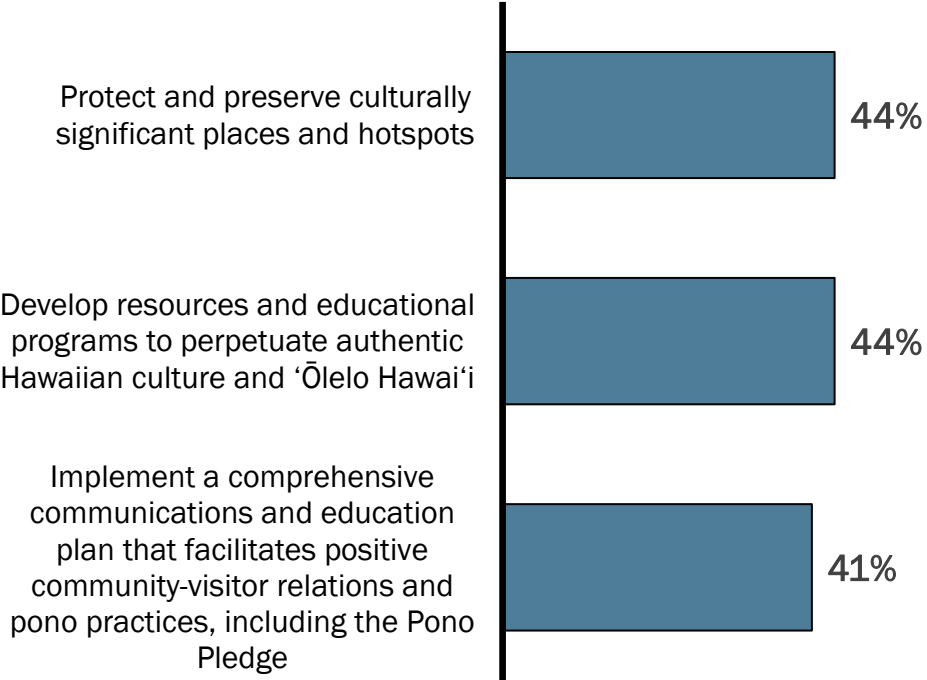
Destination Management Action Plans Awareness: Hawai'i Island

Among Hawai'i Island residents, awareness of HTA's Destination Management Action Plans rose to 25 percent, a 5-point improvement from the previous period. Around half (55%) were aware of at least one plan such as protecting culturally significant places, perpetuating authentic Hawaiian culture, or implementing communications that facilitates positive community-visitor relations.

% Aware of HTA Destination Management Action Plans



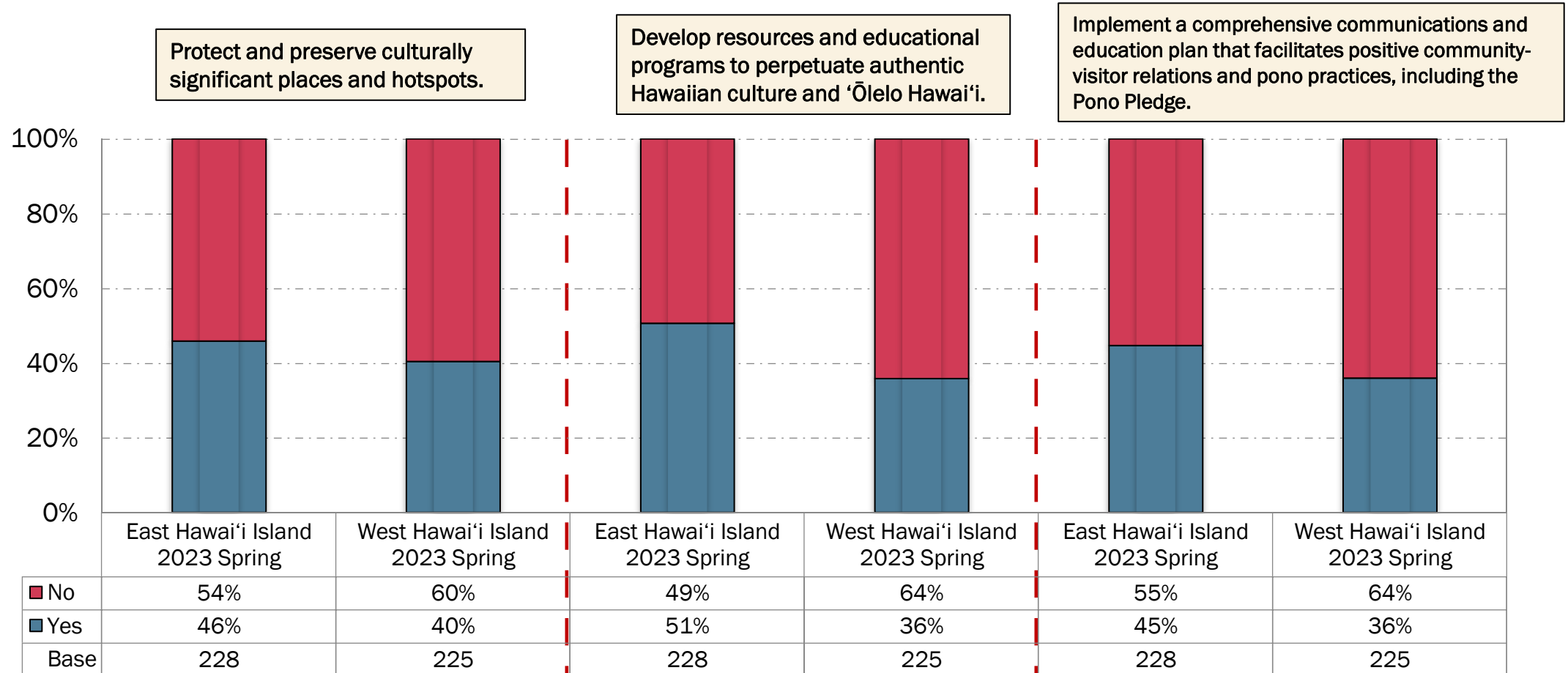
ALL Hawai'i Island residents: 55% aware of at least one plan



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: 453)

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: 453)

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

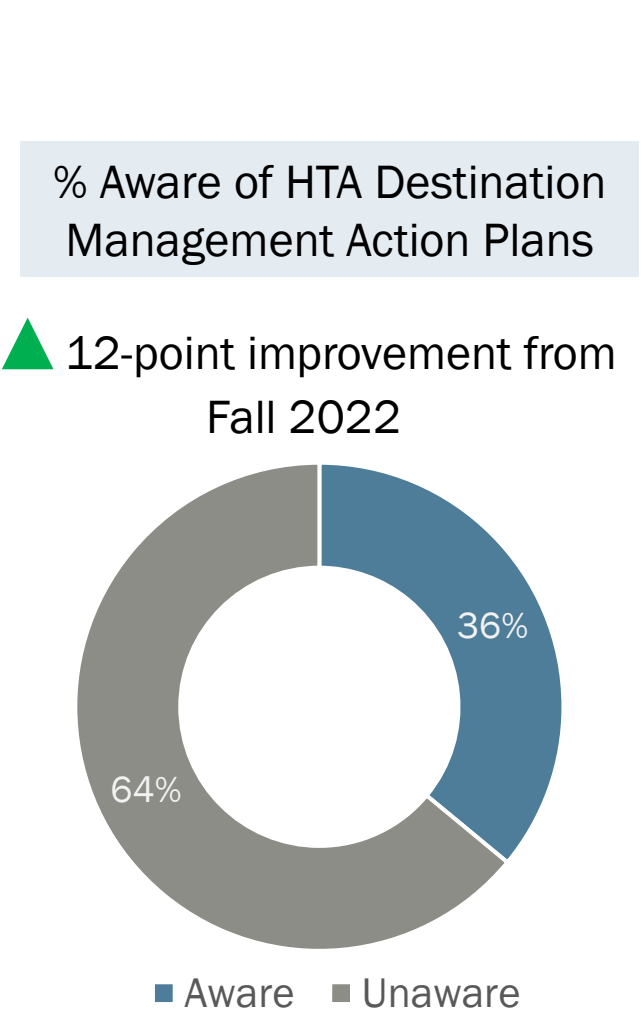


Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

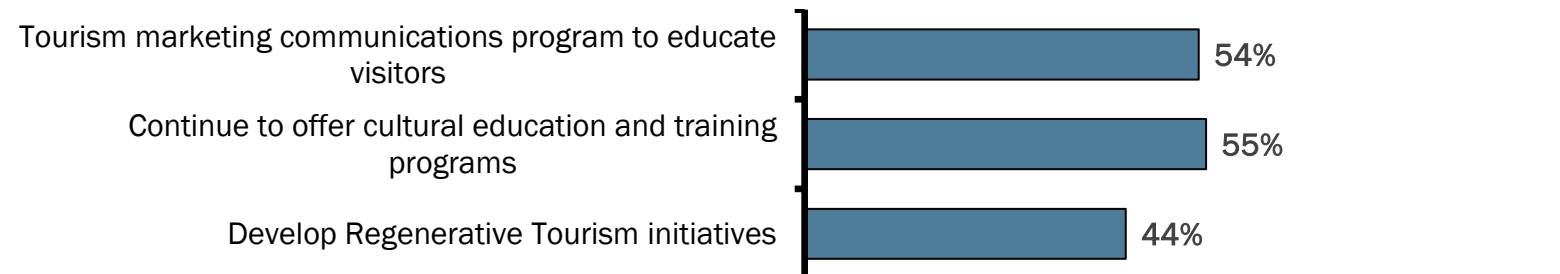


Hawai'i Tourism Authority's Destination Management Action Plan: Maui County (Fall 2022 - Spring 2023)

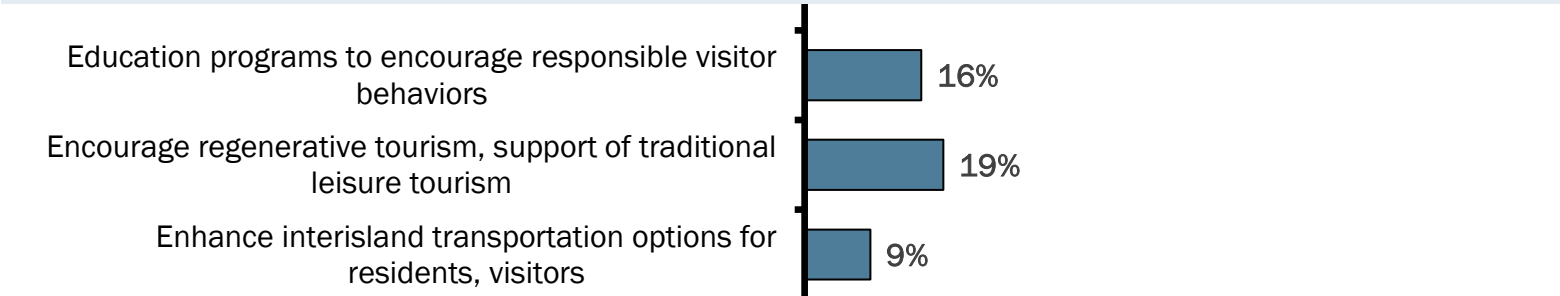
Destination Management Action Plans Awareness: Maui County



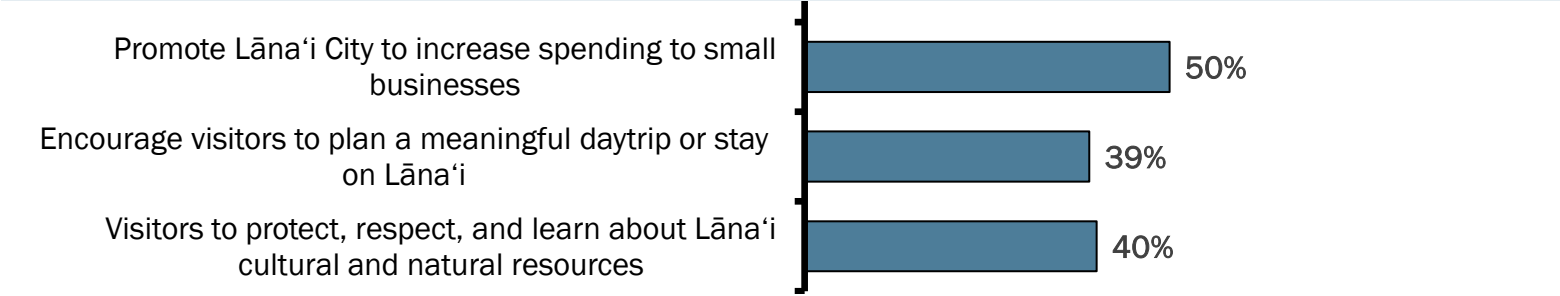
ALL Maui residents: 63% aware of at least one plan



ALL Moloka'i residents: 30% aware of at least one plan



ALL Lāna'i residents: 63% aware of at least one plan

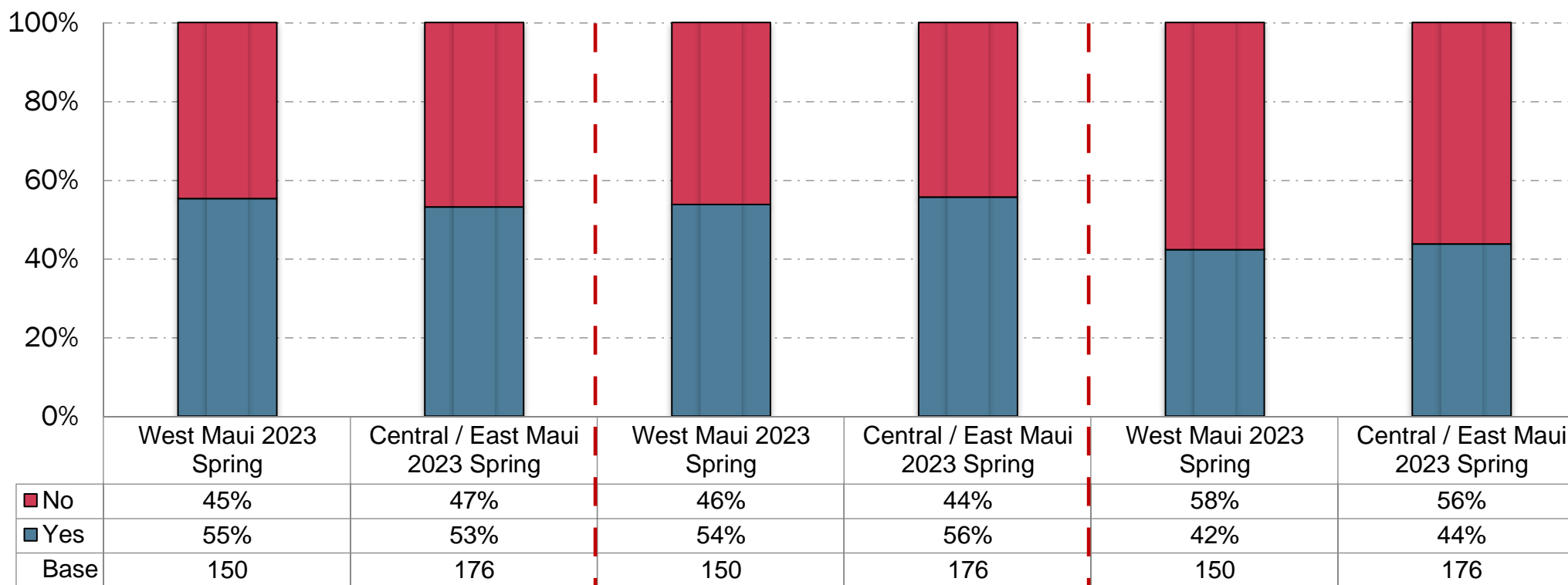


Awareness of Specific DMAP Action Plans – *By Island of Maui*

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

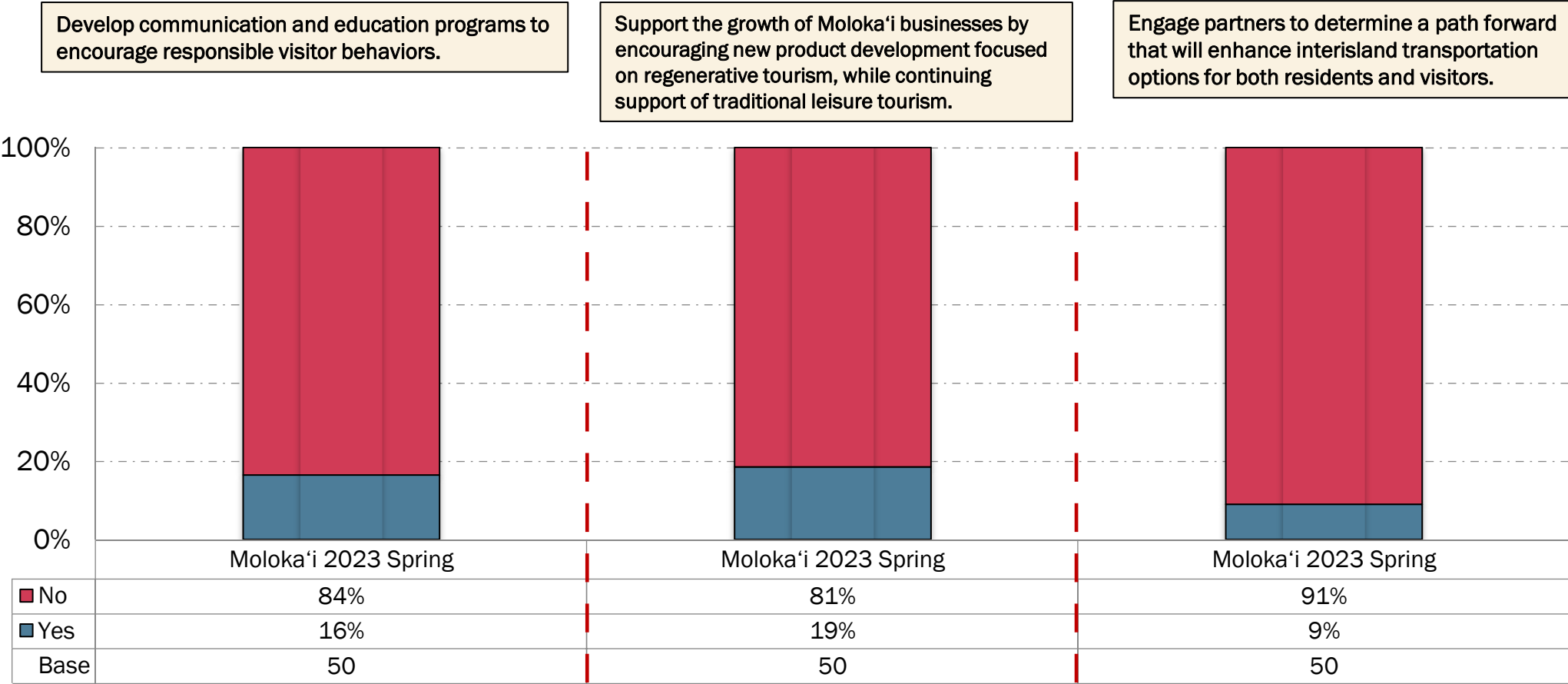
Continue to offer cultural education and training programs to enhance and perpetuate aloha, mālama and kuleana, and the authentic Hawai'i experience.

Develop Regenerative Tourism initiatives.

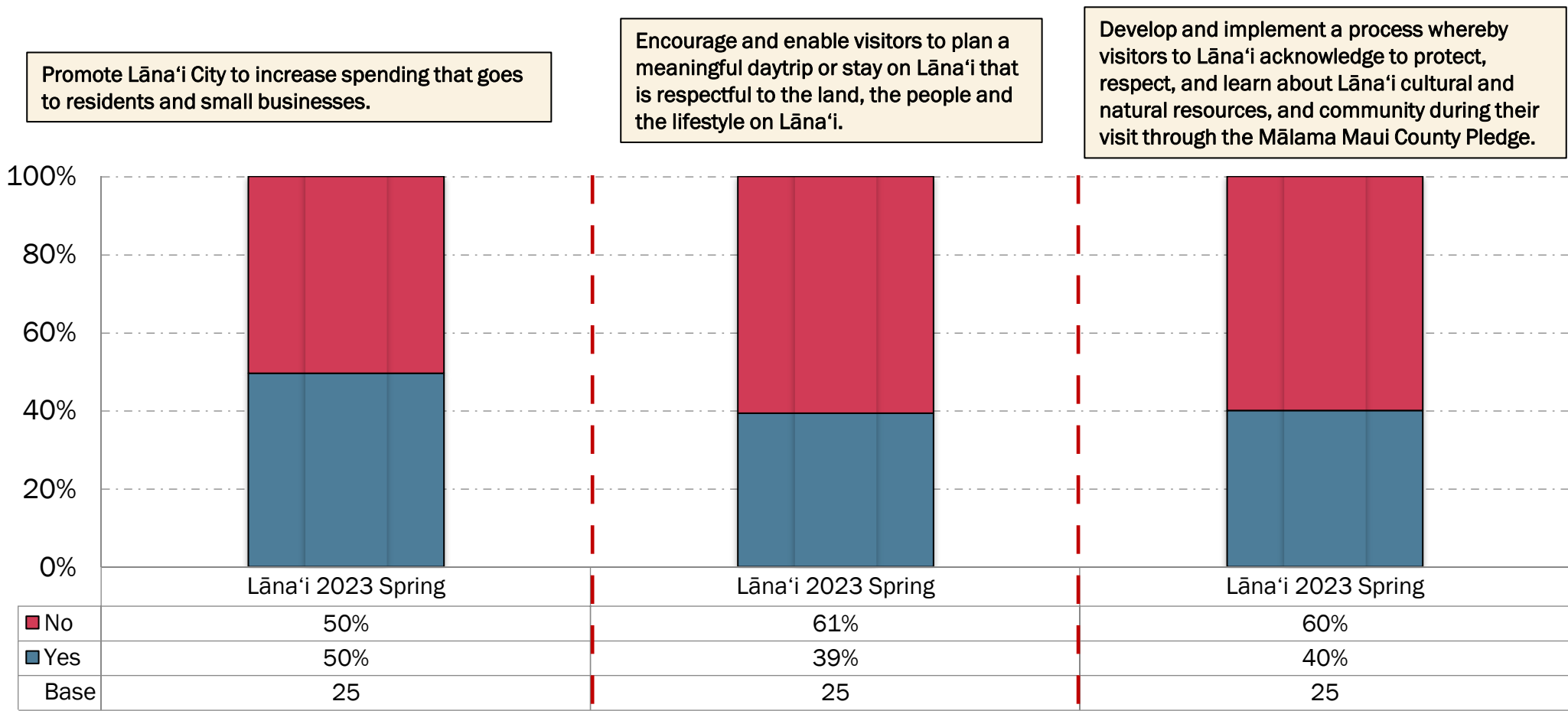


Q10a. I'm going to read you a brief list of actions included in the Hawai'i Tourism Authority's Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:

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



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



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



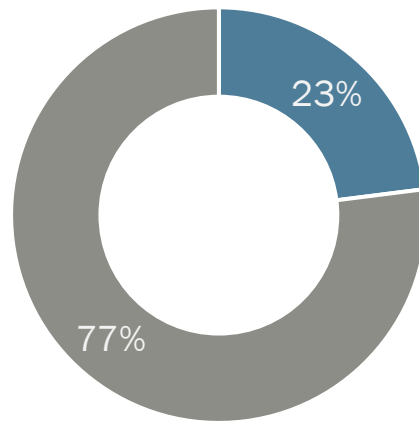
Hawai'i Tourism Authority's Destination Management Action Plan: Kaua'i (Fall 2022 - Spring 2023)

Destination Management Action Plans Awareness: Kaua'i

Approximately one-in-four (23%) are aware of HTA's Destination Management Action Plans, a 1-point improvement from the previous period. Around half (52%) were aware of at least one plan such as policy efforts to instill appropriate behavior for visitors/residents, policies that address overtourism, or educational materials for visitors/new residents to have respect for local cultural values.

% Aware of HTA Destination Management Action Plans

▲ 1-point improvement from Fall 2022



■ Aware ■ Unaware

ALL Kaua'i residents: 52% aware of at least one plan

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

34%

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

29%

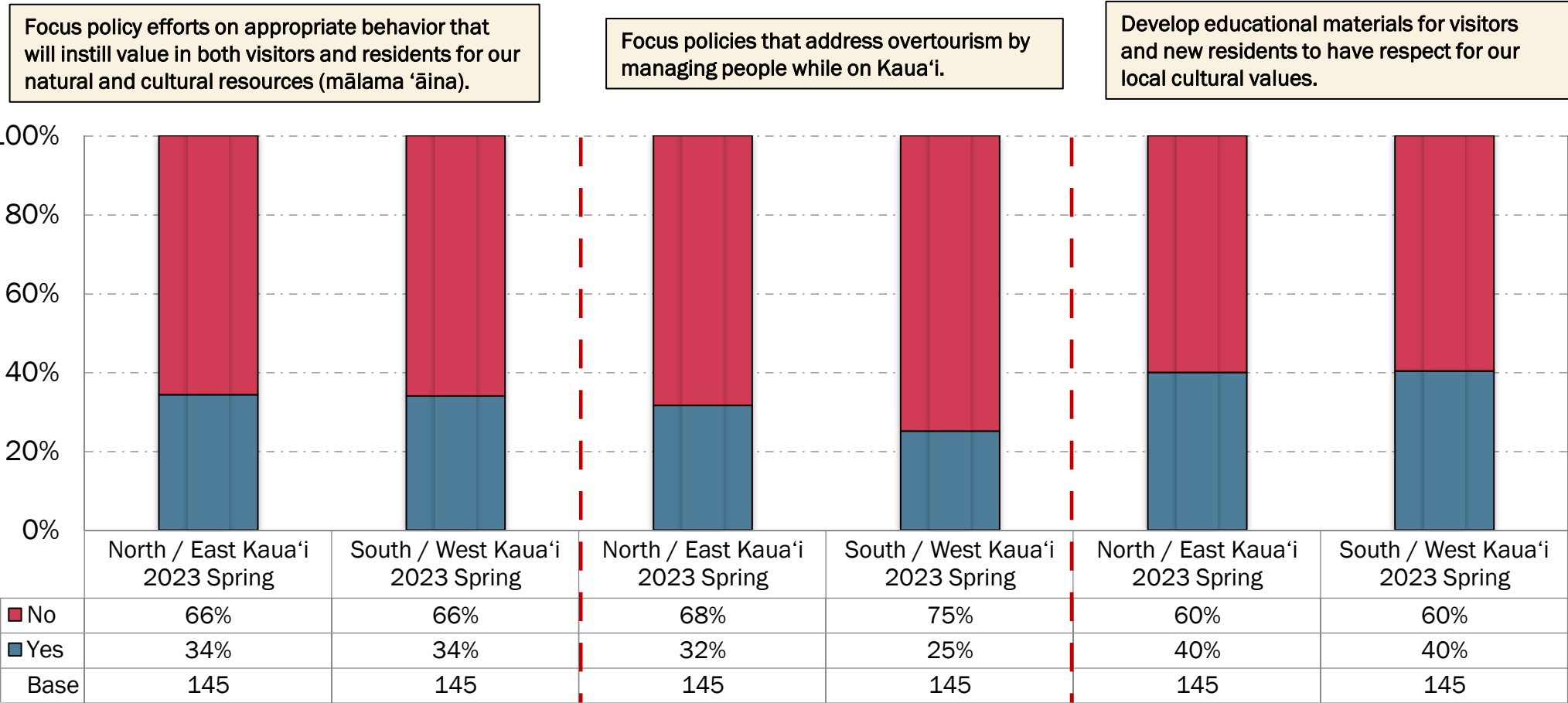
Develop educational materials for visitors and new residents to have respect for our local cultural values

40%

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

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

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

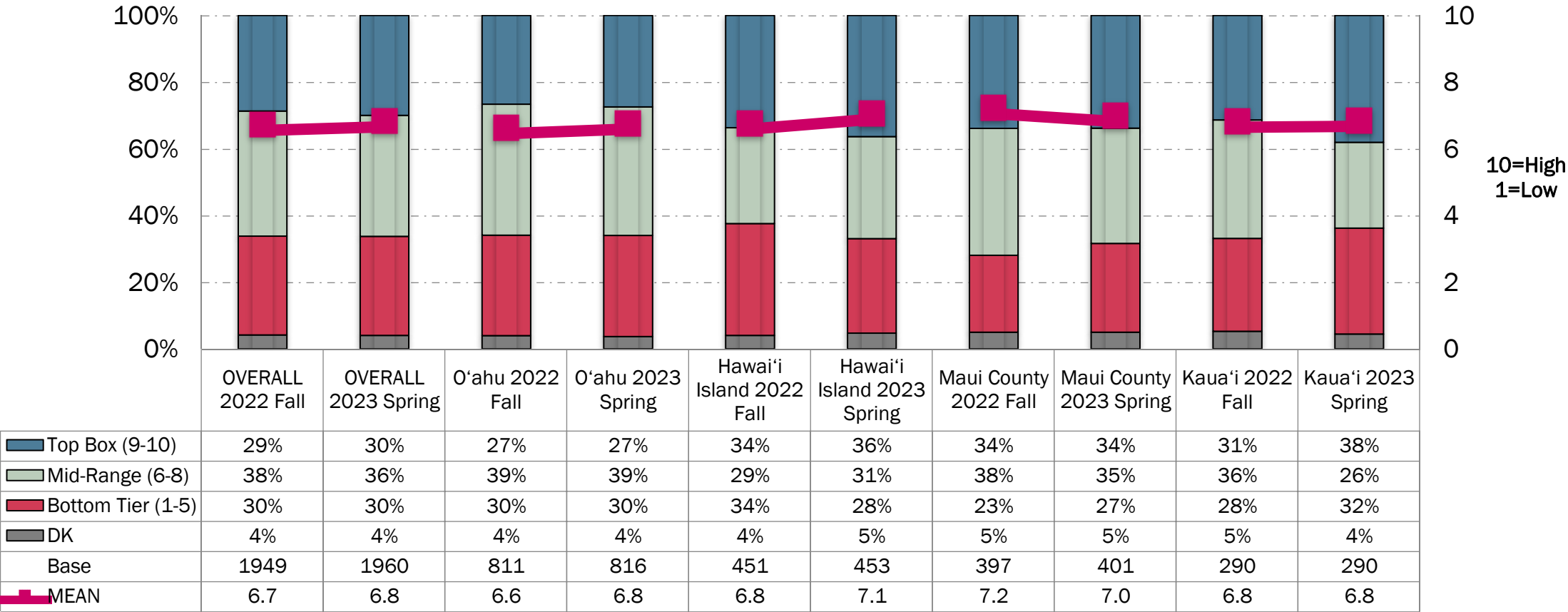


Q10a. I’m going to read you a brief list of actions included in the Hawaiʻi Tourism Authority’s Destination Management Action Plan for [INSERT ISLAND]. Are you aware that the HTA is working to:



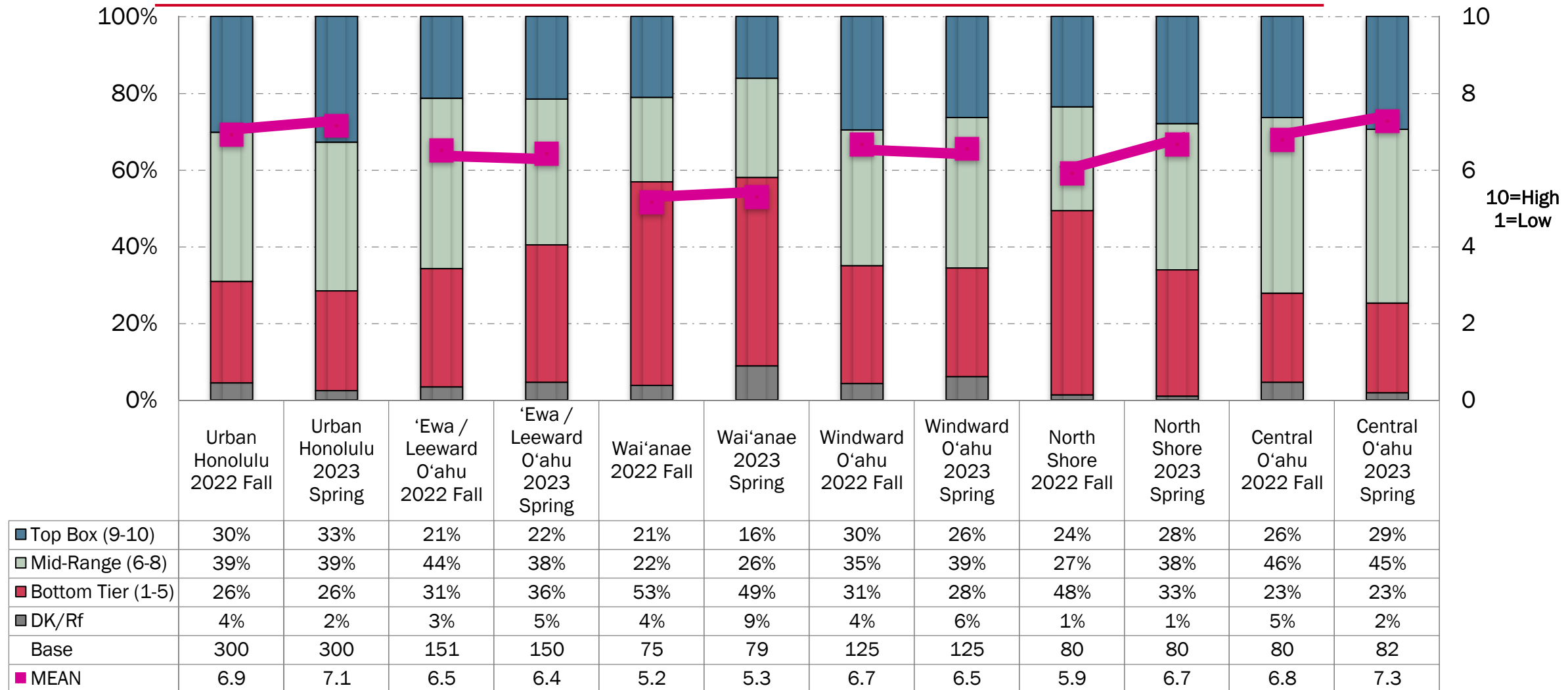
Tax Revenues for Managed Tourism (Fall 2022 - Spring 2023)

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

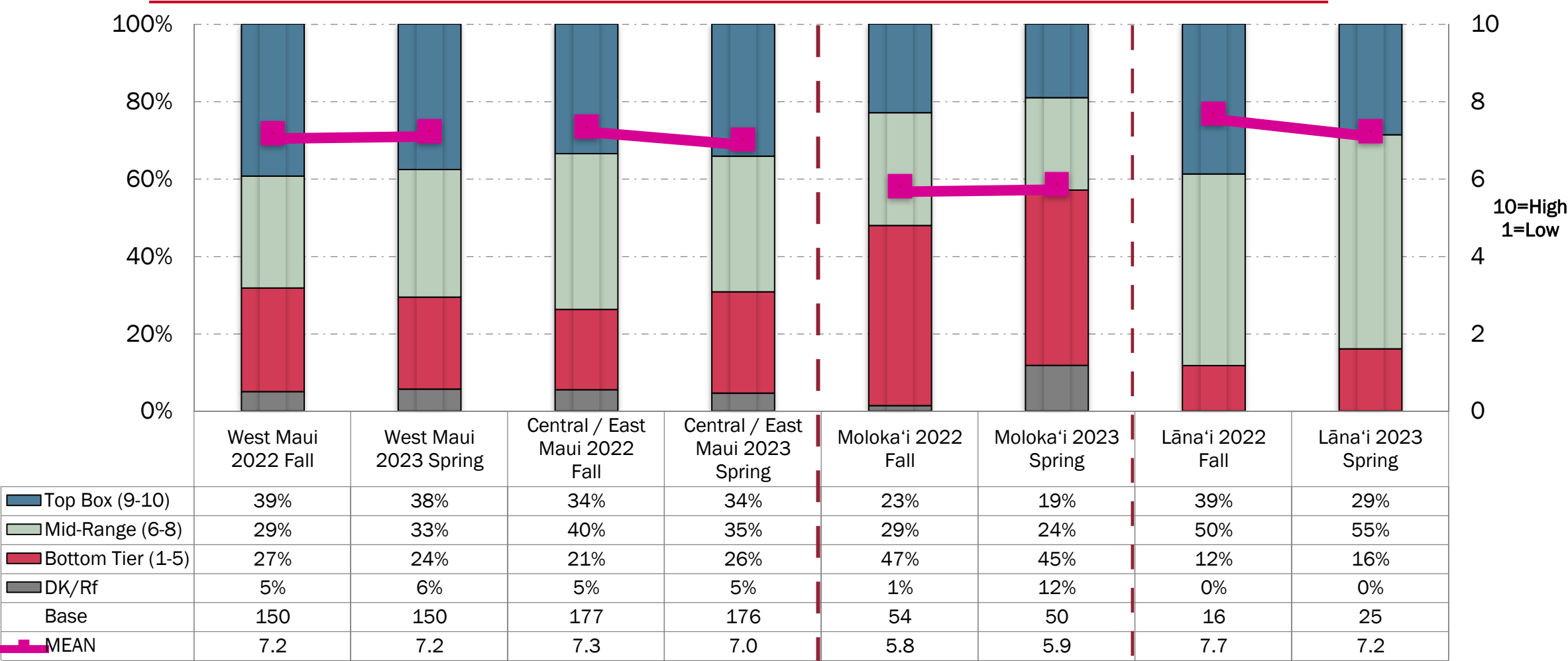


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

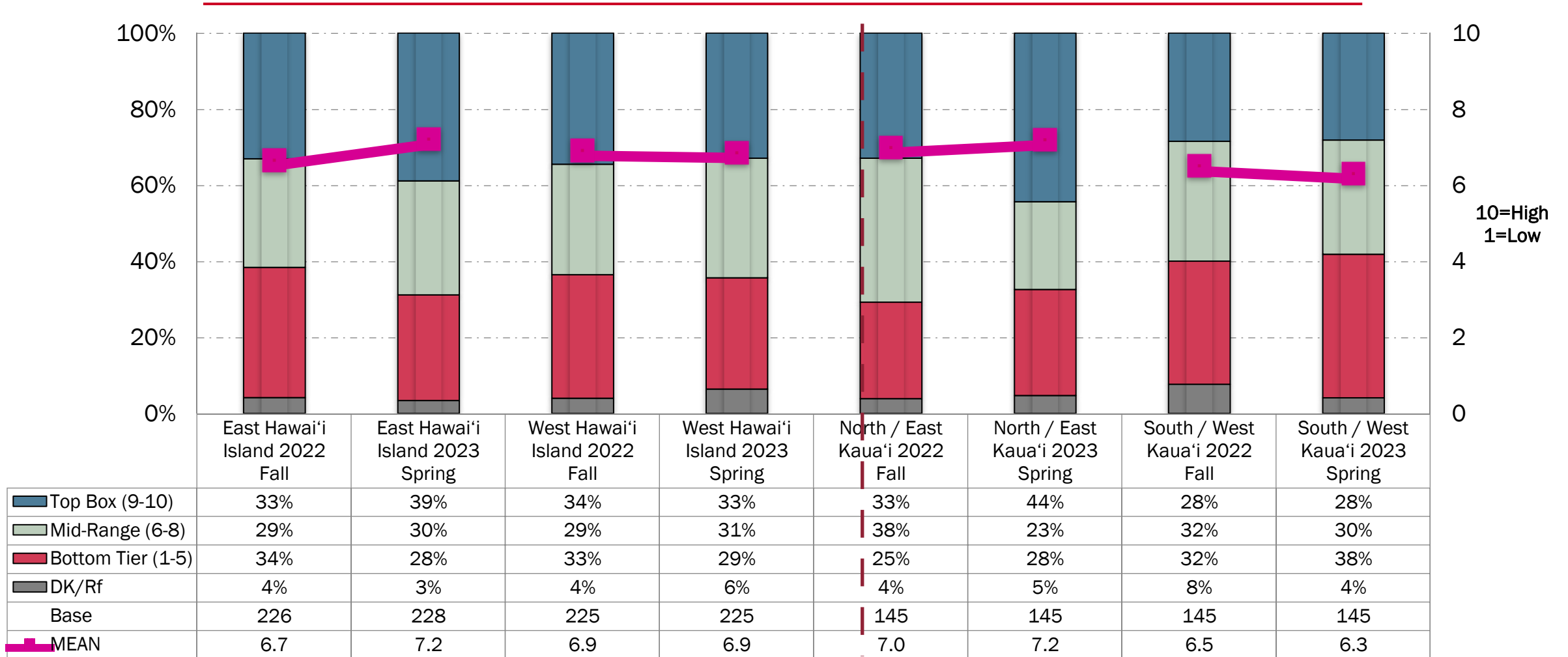
“Tax dollars should be spent to MANAGE the impacts of tourism in my community” - *By Area (O‘ahu)*



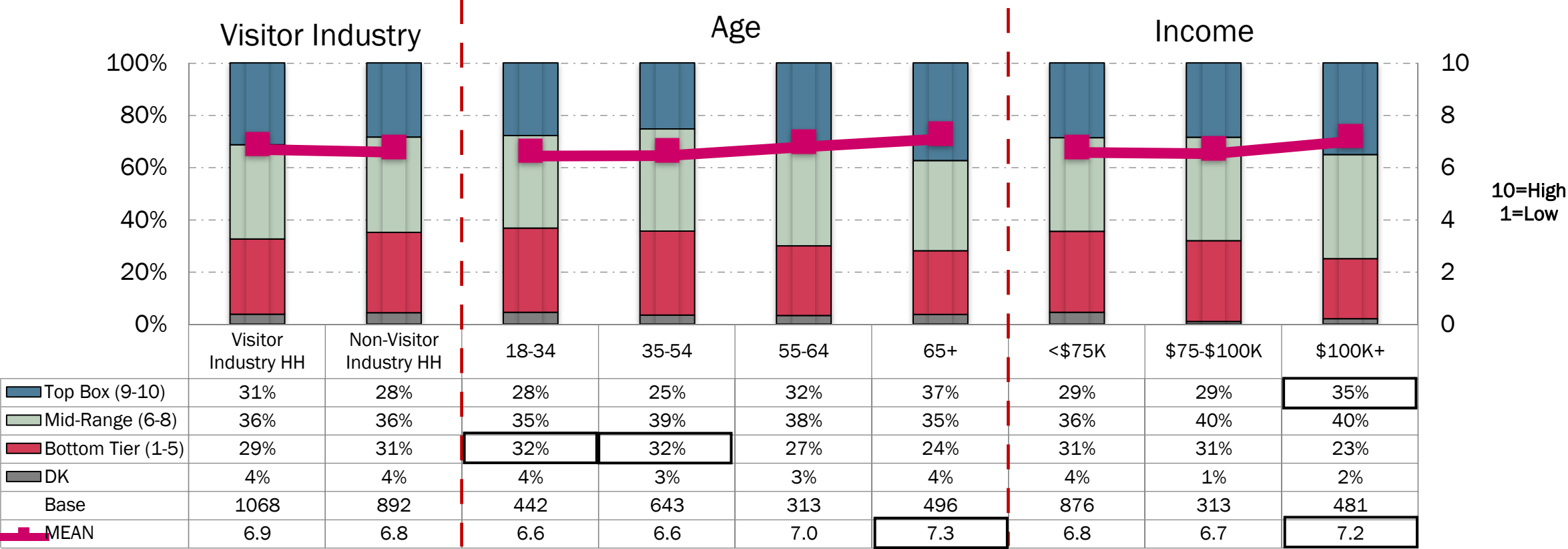
“Tax dollars should be spent to MANAGE the impacts of tourism in my community” - *By Area (Maui County)*



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

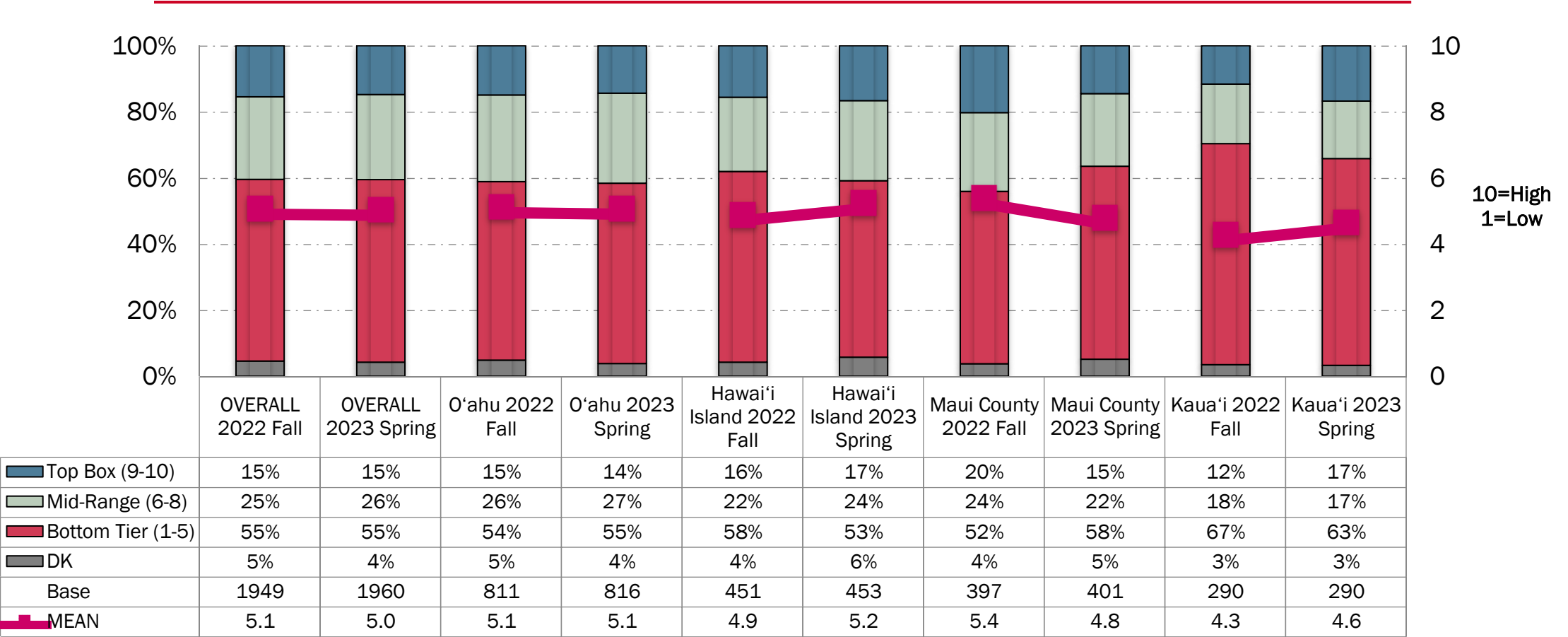


“Tax dollars should be spent to MANAGE the impacts of tourism in my community” – *By Demographics*



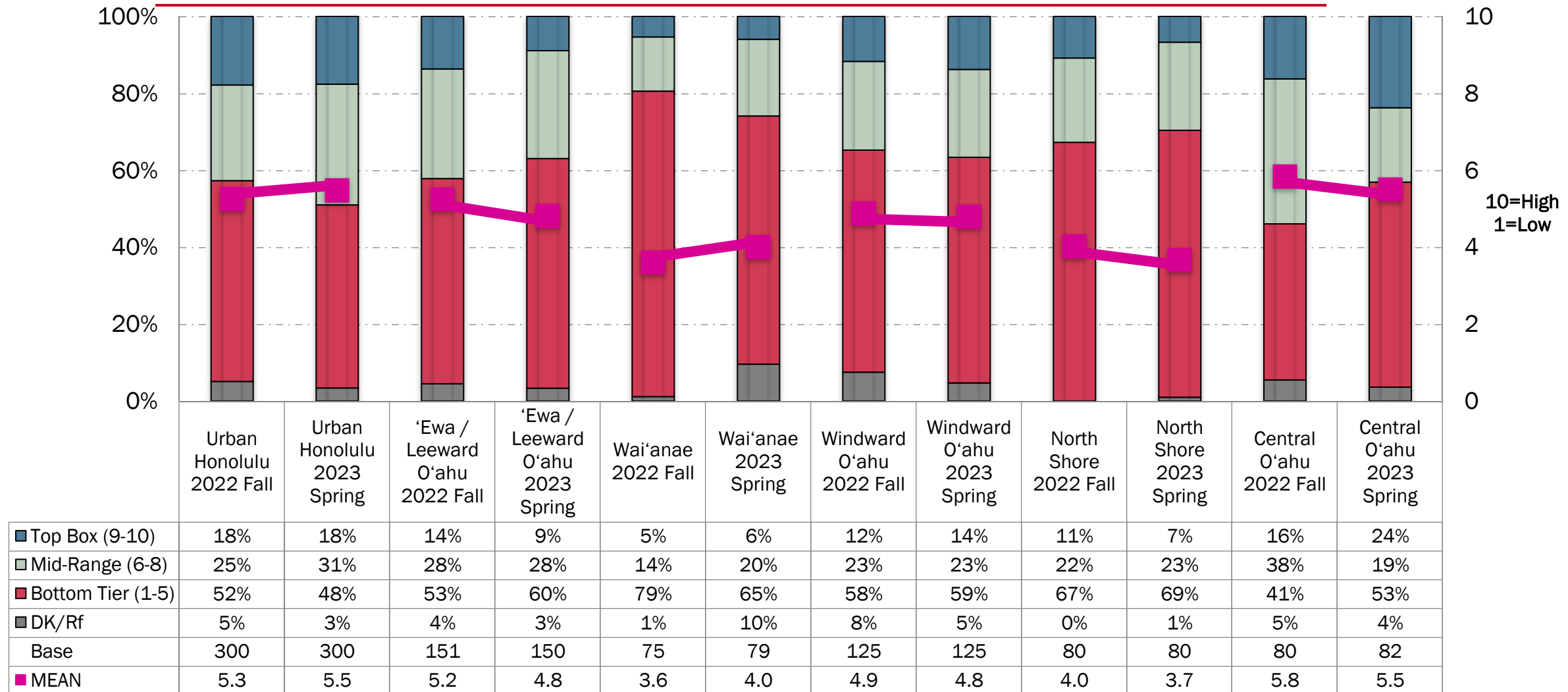
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



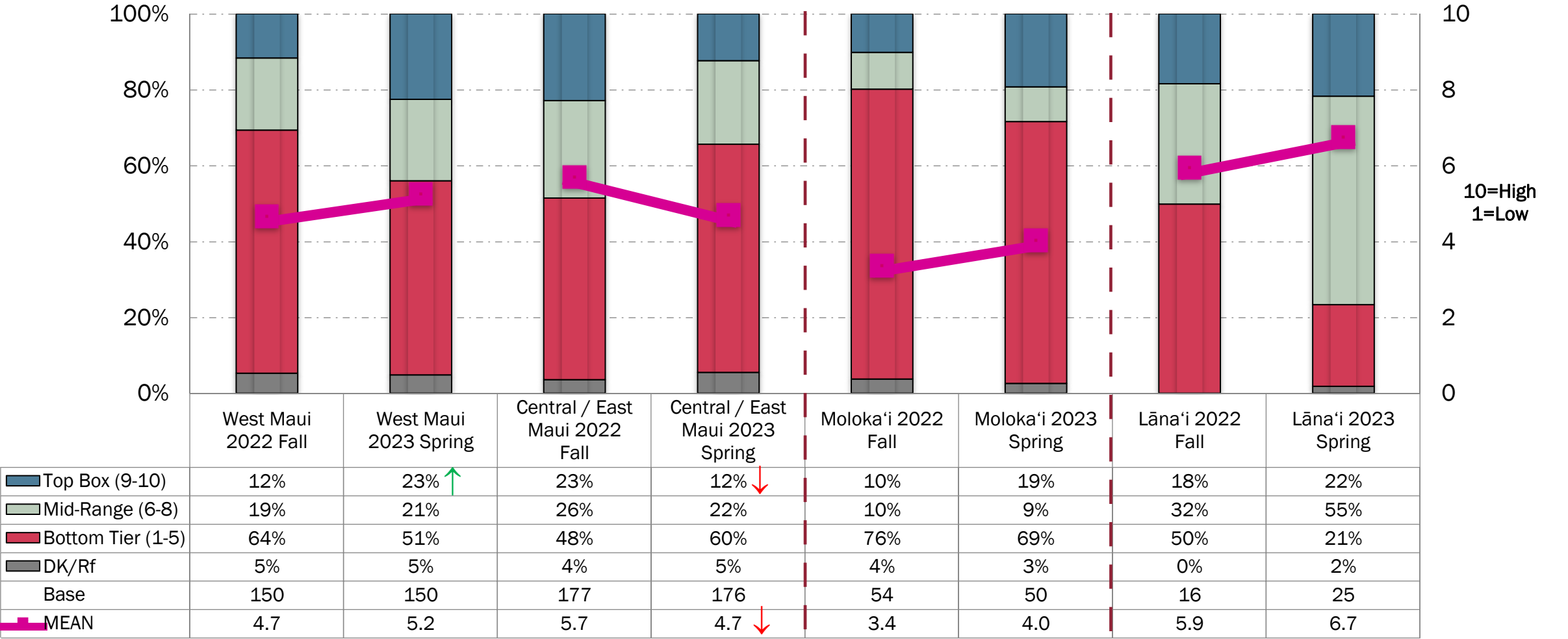
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



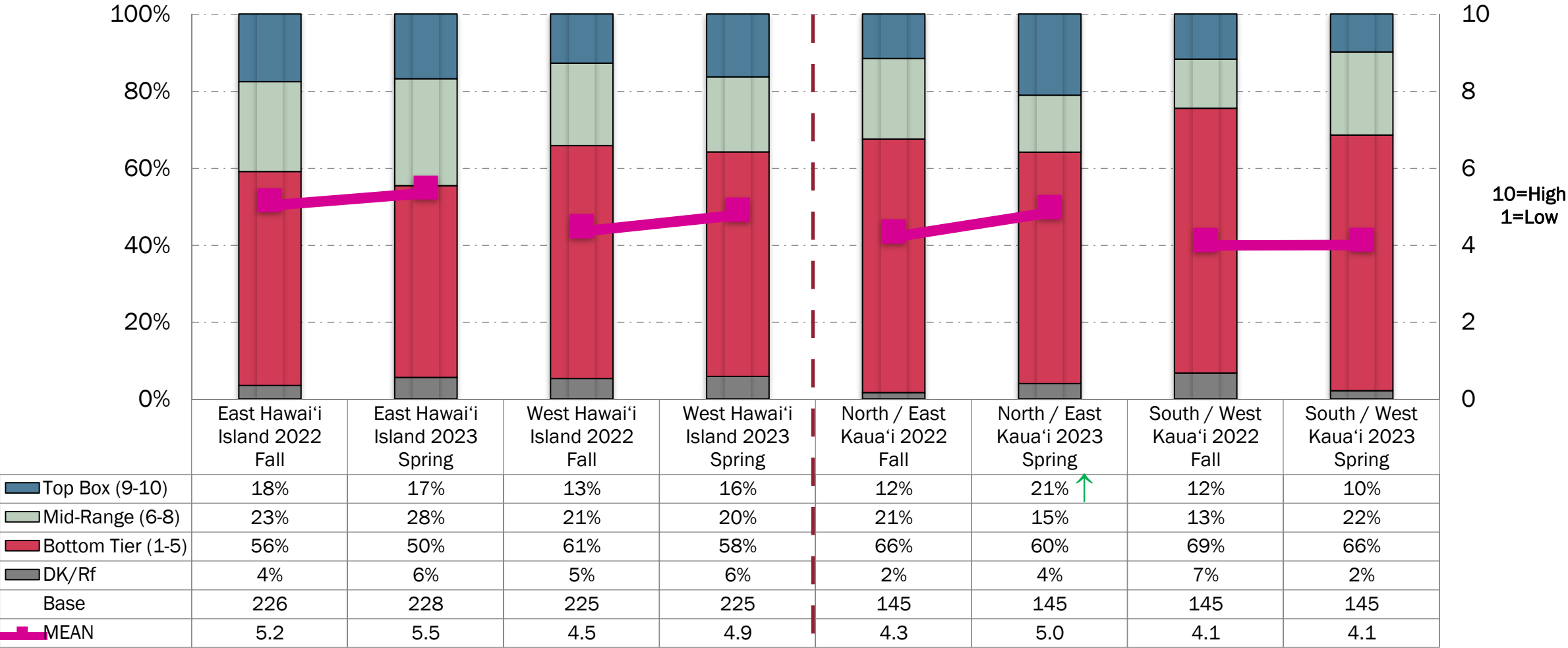
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



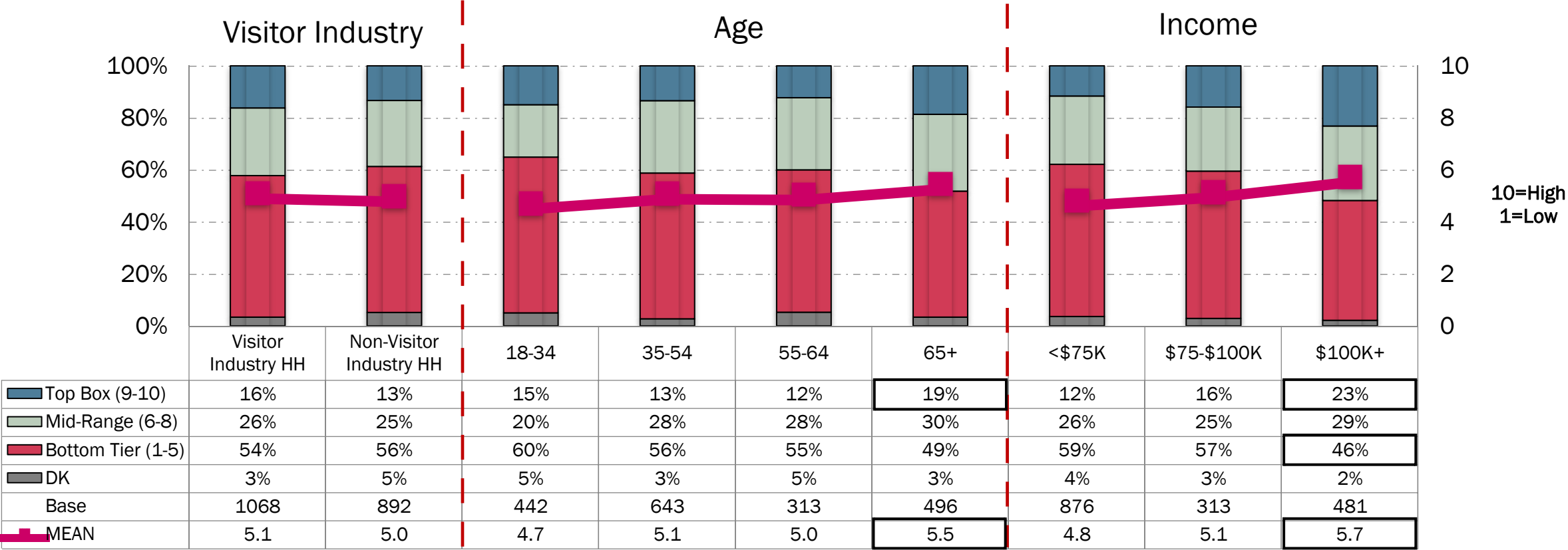
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



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

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

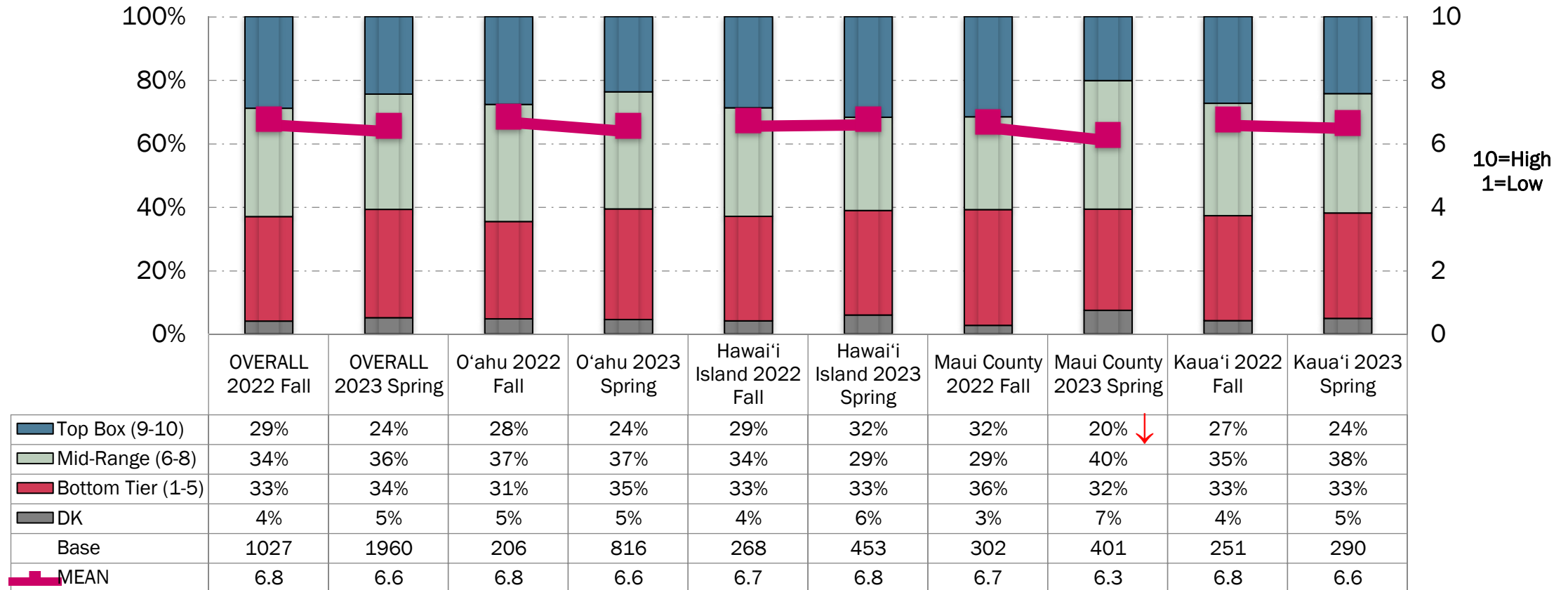


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]



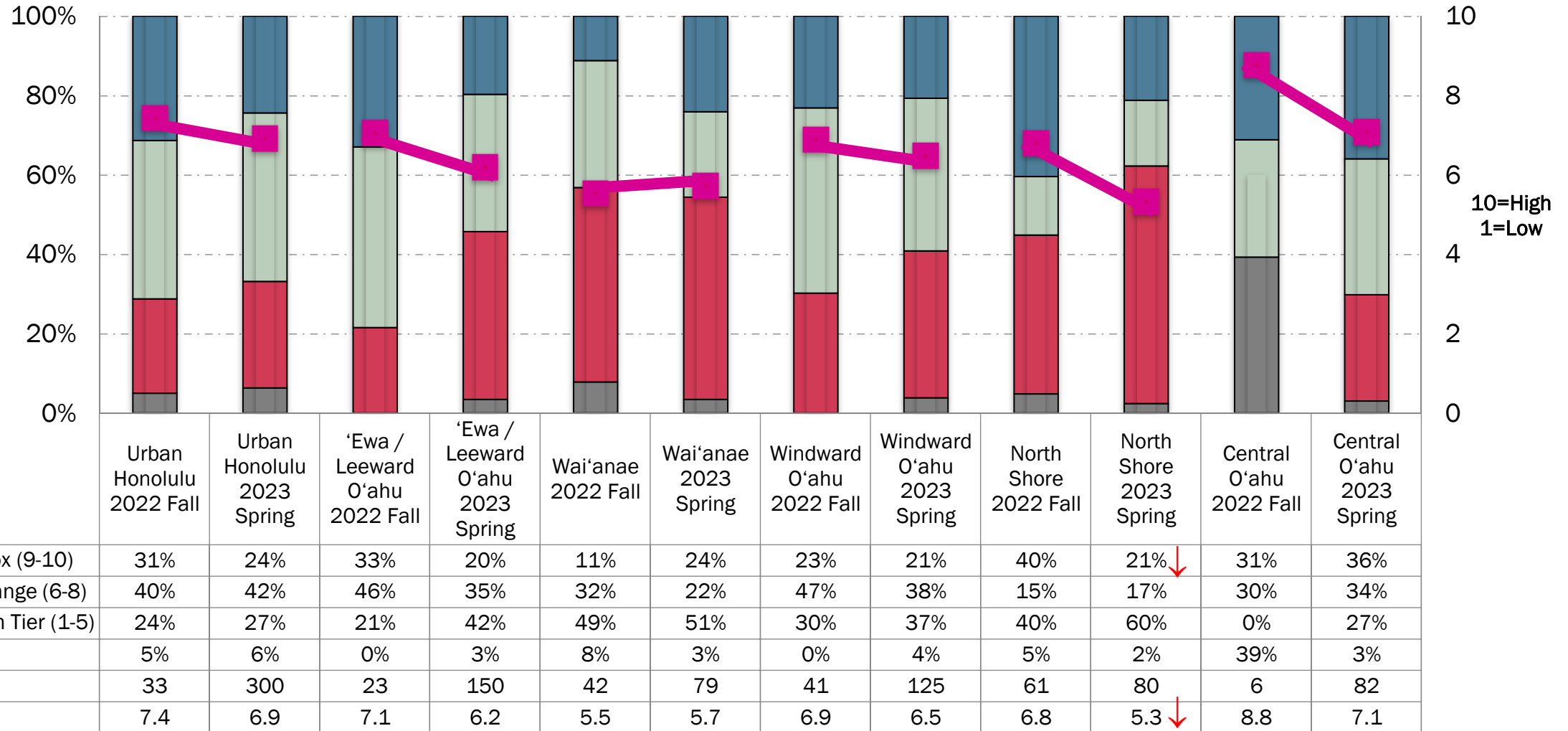
Tourism Worth the Issues (Fall 2022 - Spring 2023)

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

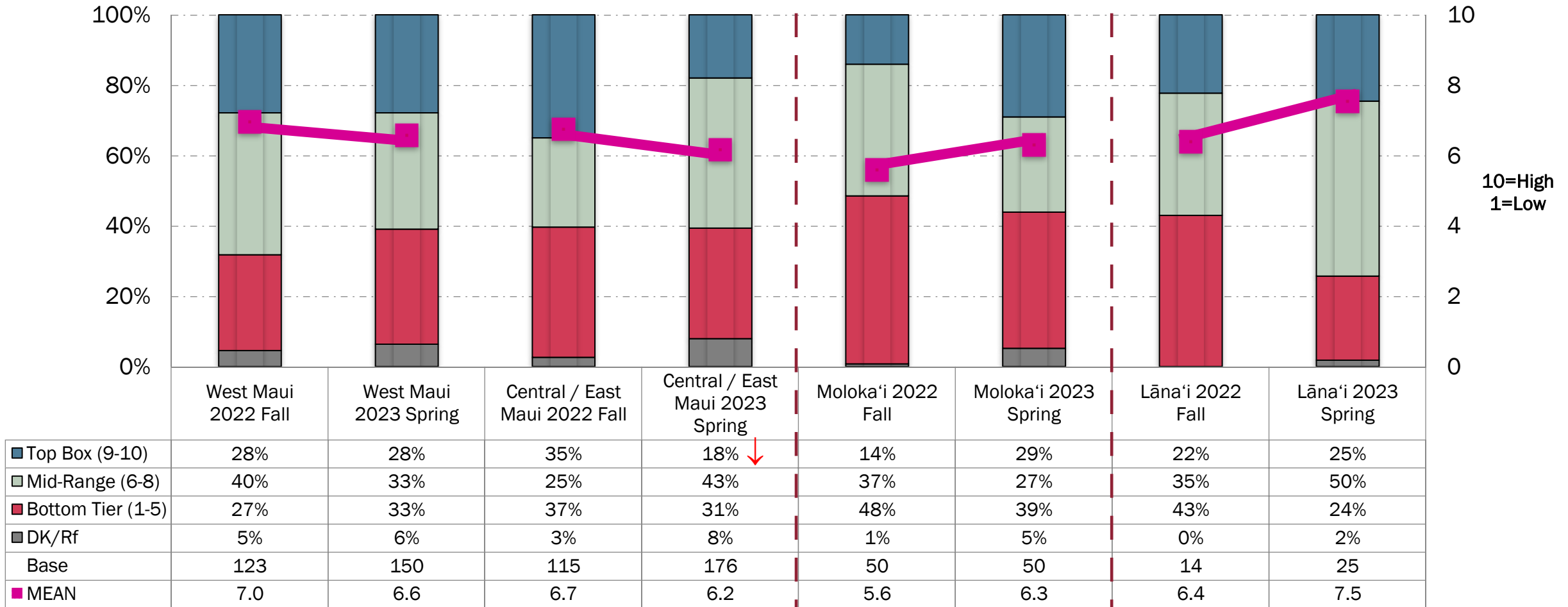


Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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

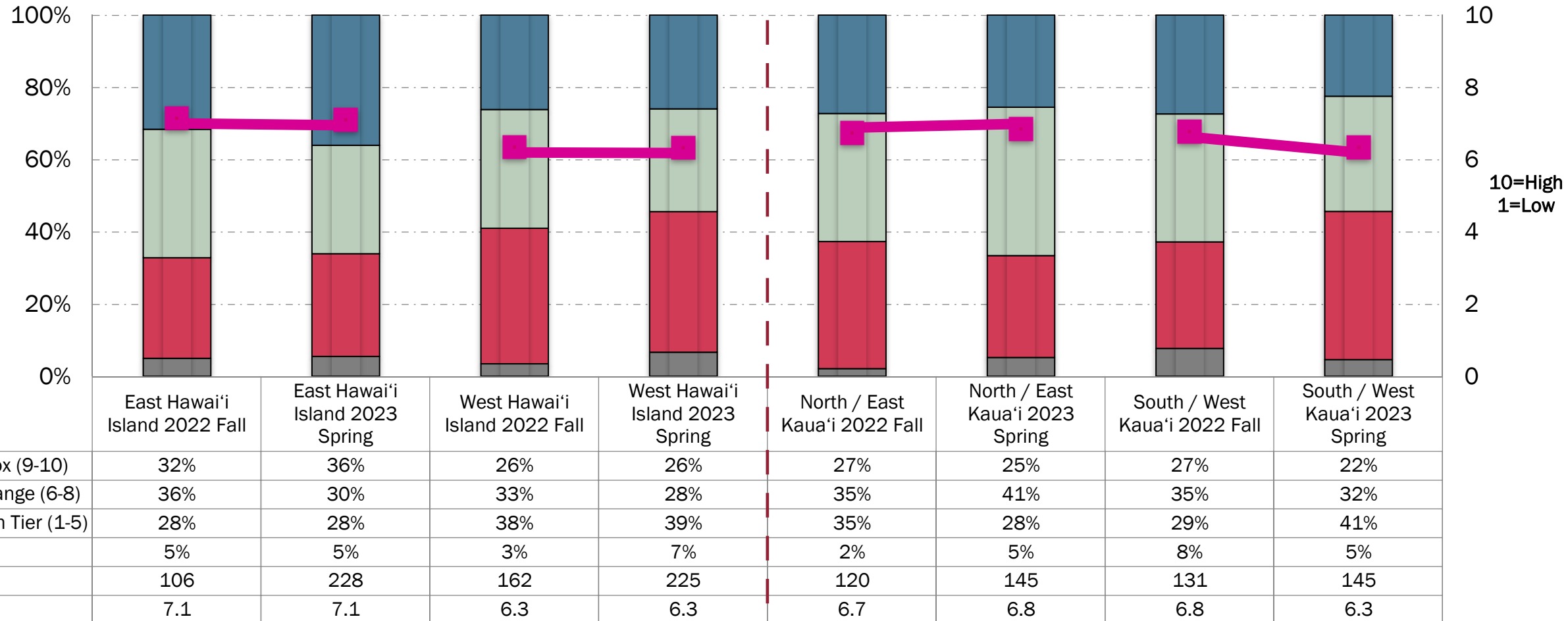


“I feel like tourism is worth the issues associated with the industry” - By Area (Maui County)



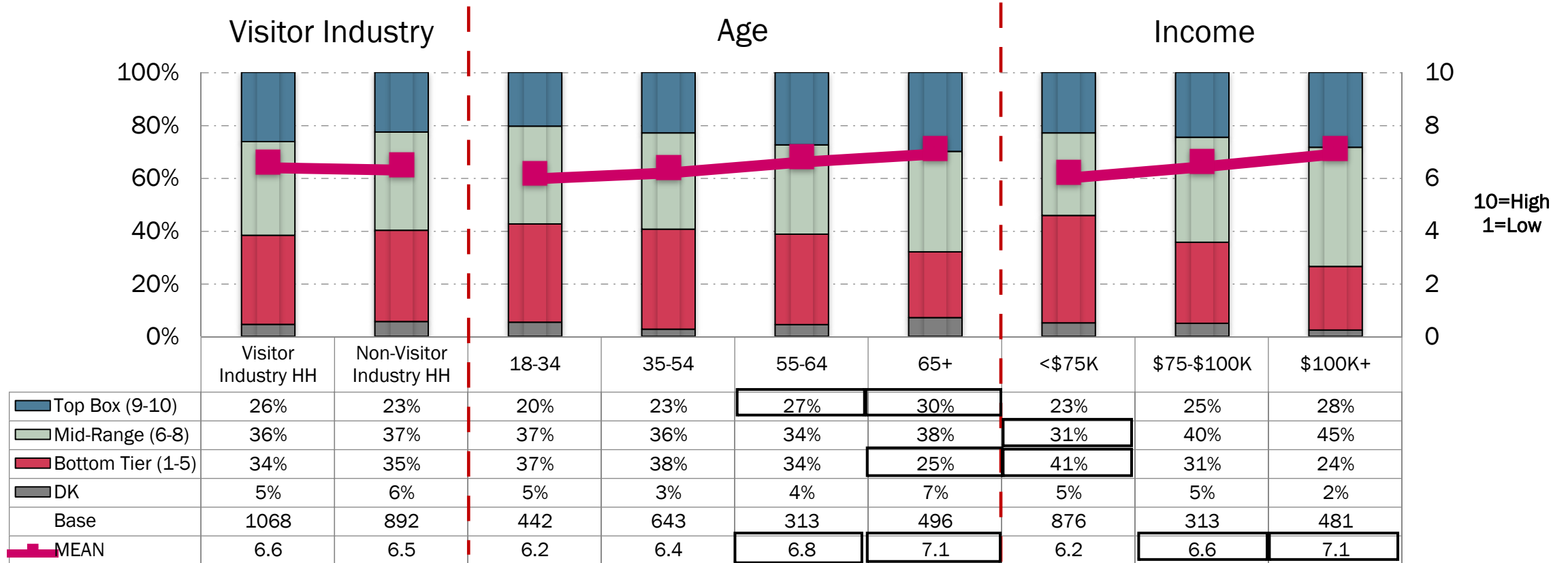
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“I feel like tourism is worth the issues associated with the industry” - By Area (Hawai'i Island & 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?

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

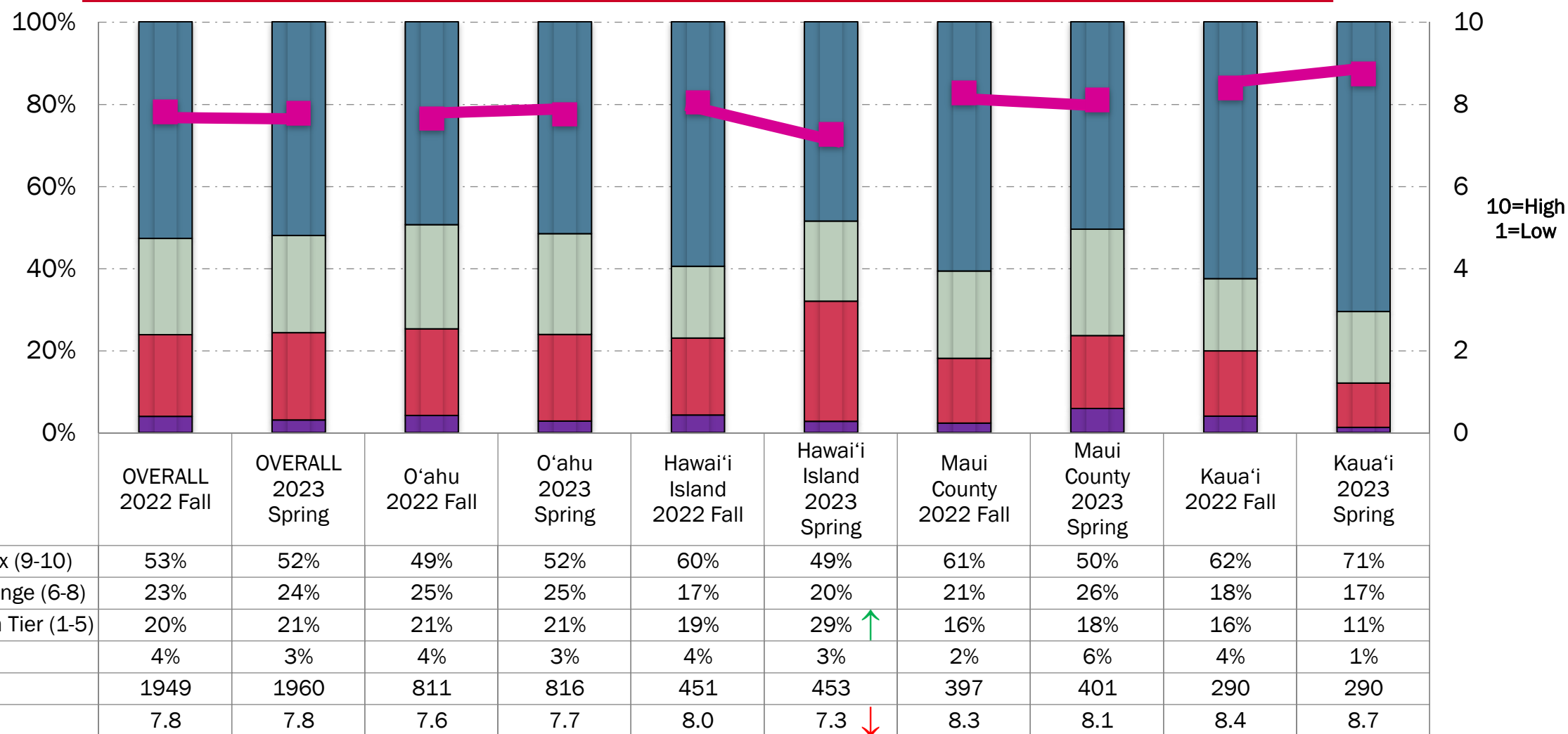


Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?



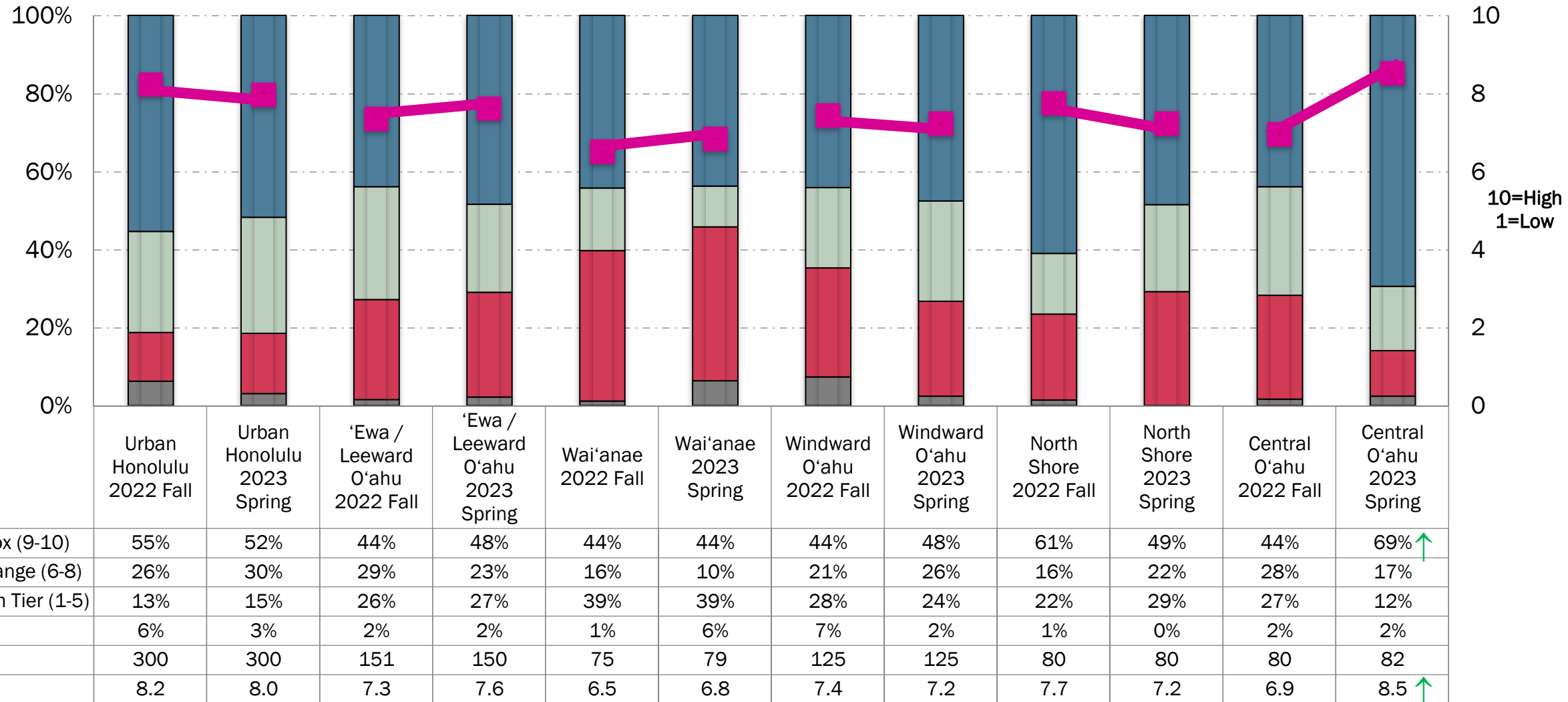
Tourism Management Strategies (Fall 2022 - Spring 2023)

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



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?

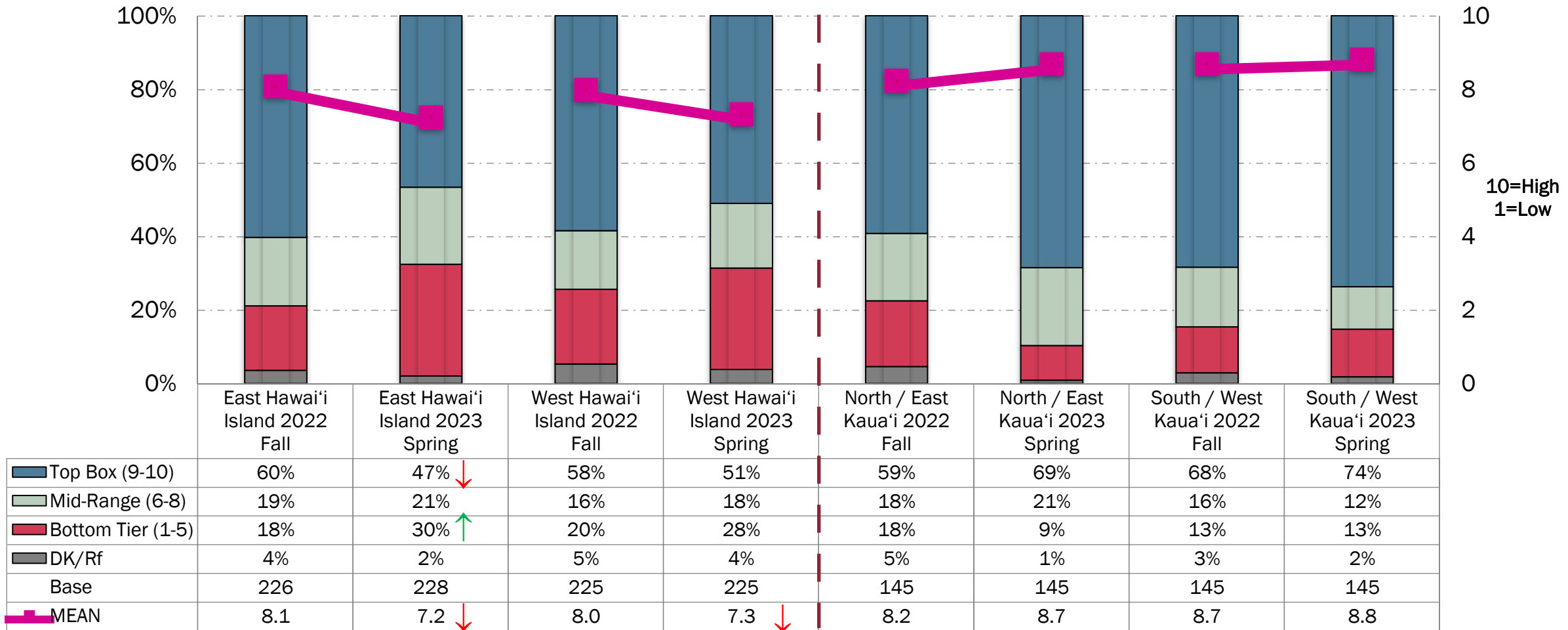
“Eliminate illegal vacation rentals on my island” - *By Area (O‘ahu)*



“Eliminate illegal vacation rentals on my island” - *By Area (Maui County)*

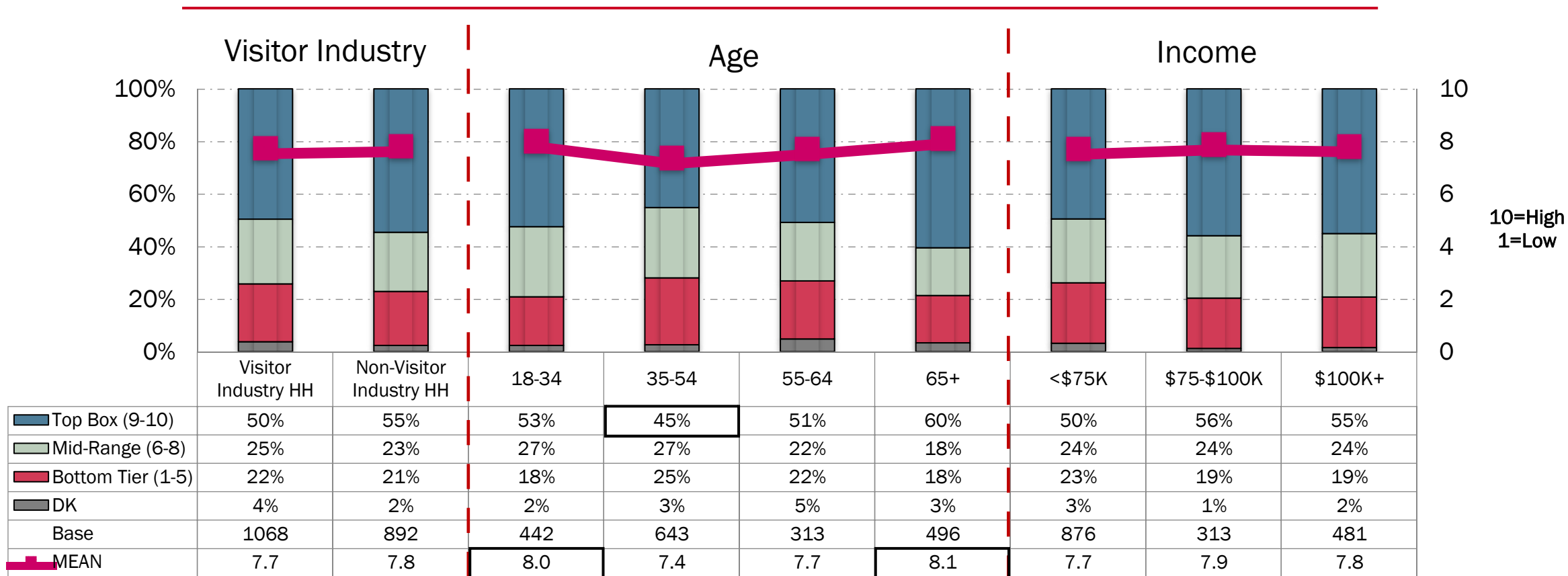


“Eliminate illegal vacation rentals on my island” – By Area (Hawai‘i Island & Kaua‘i)



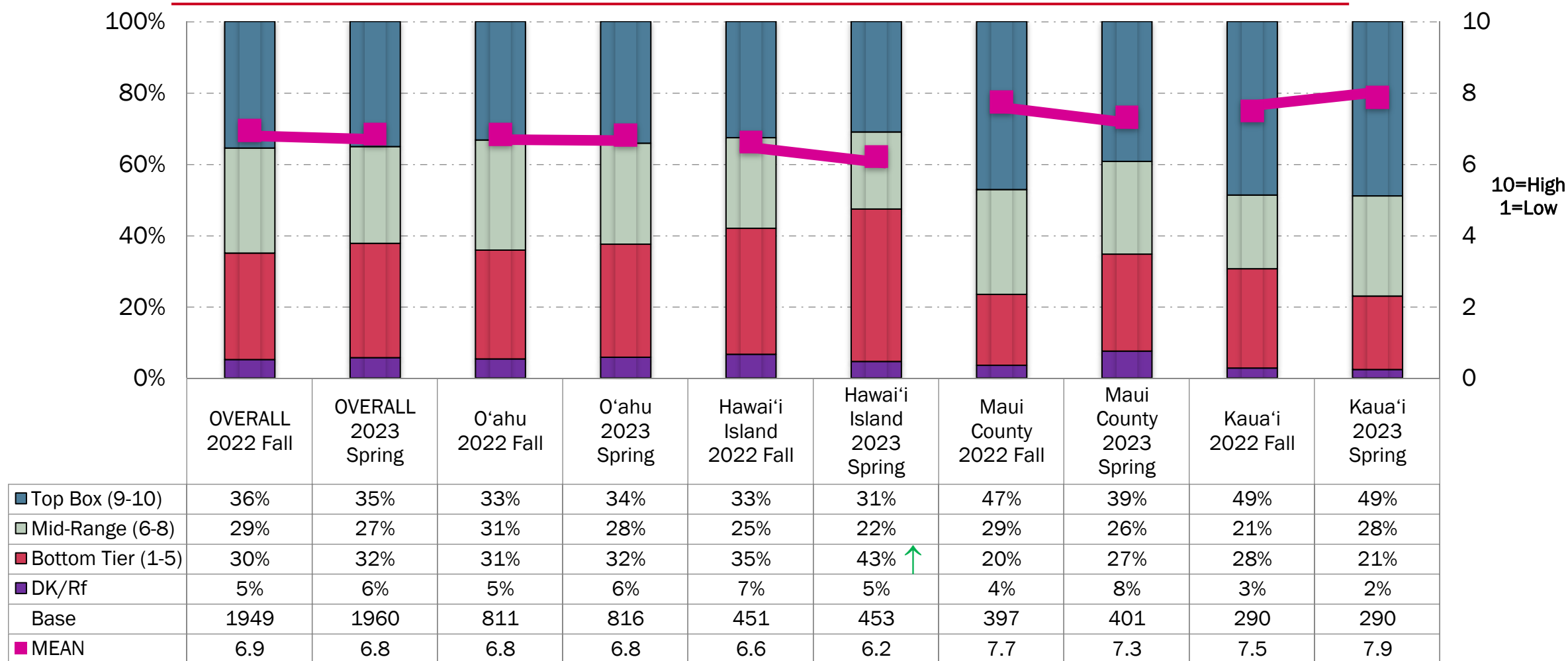
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



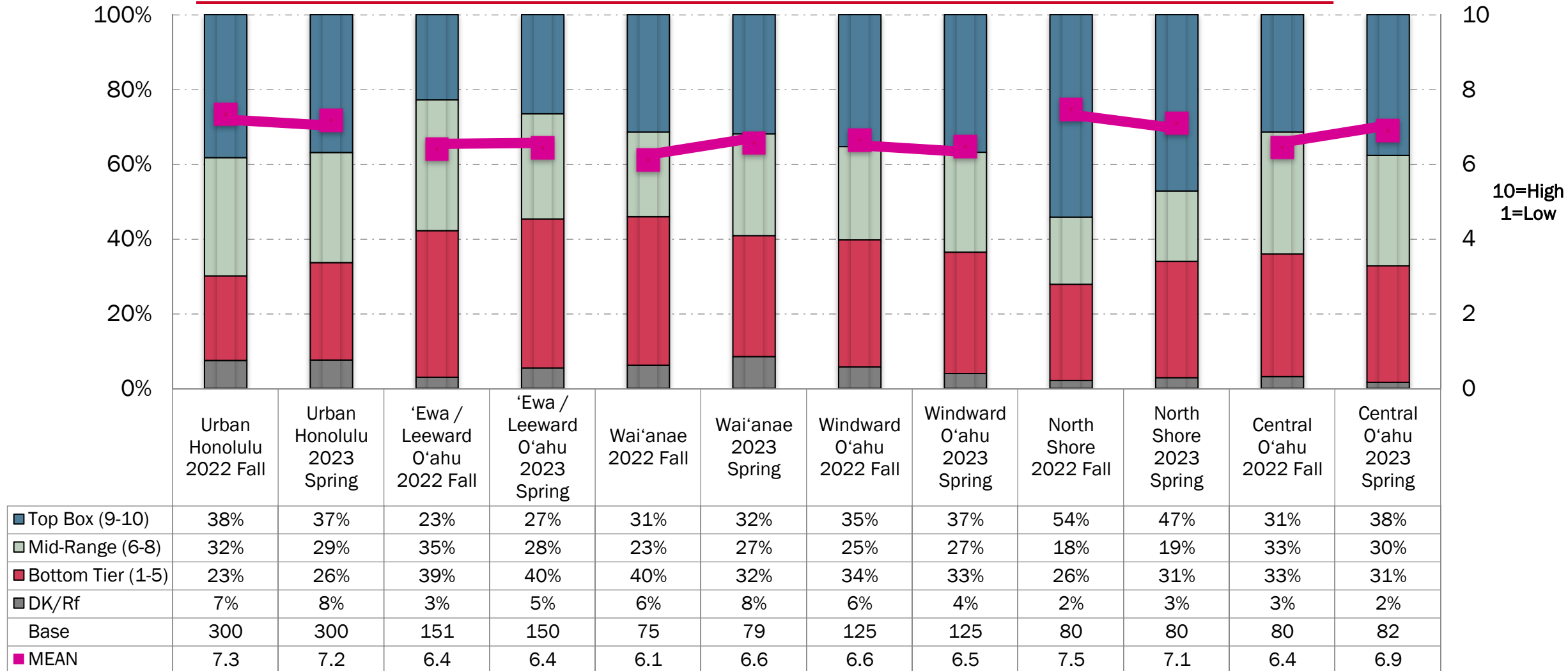
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



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 (Maui County)



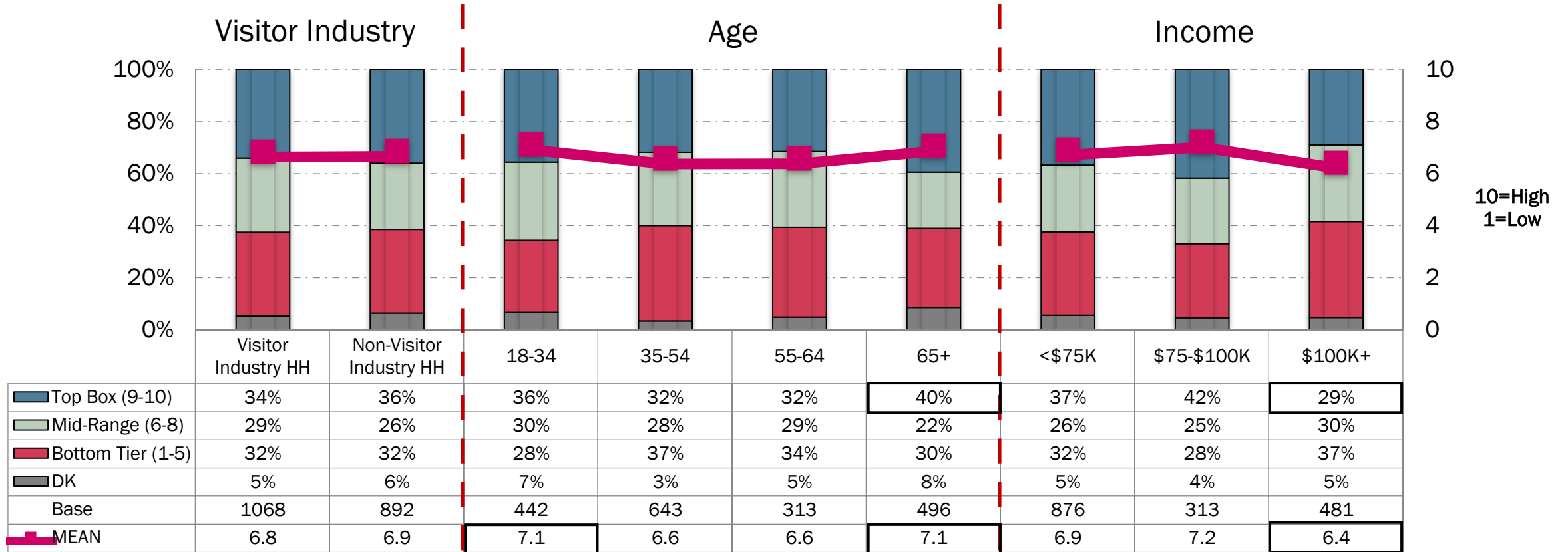
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



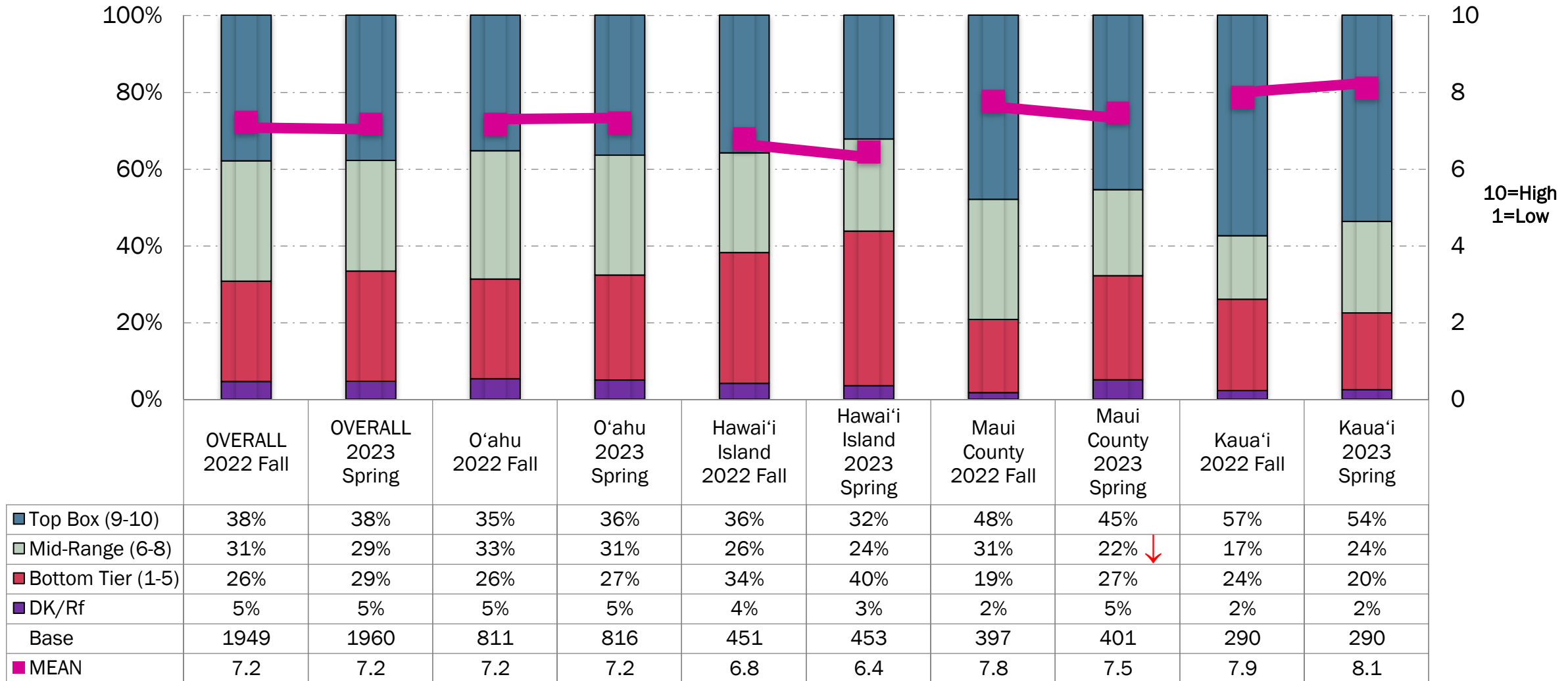
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



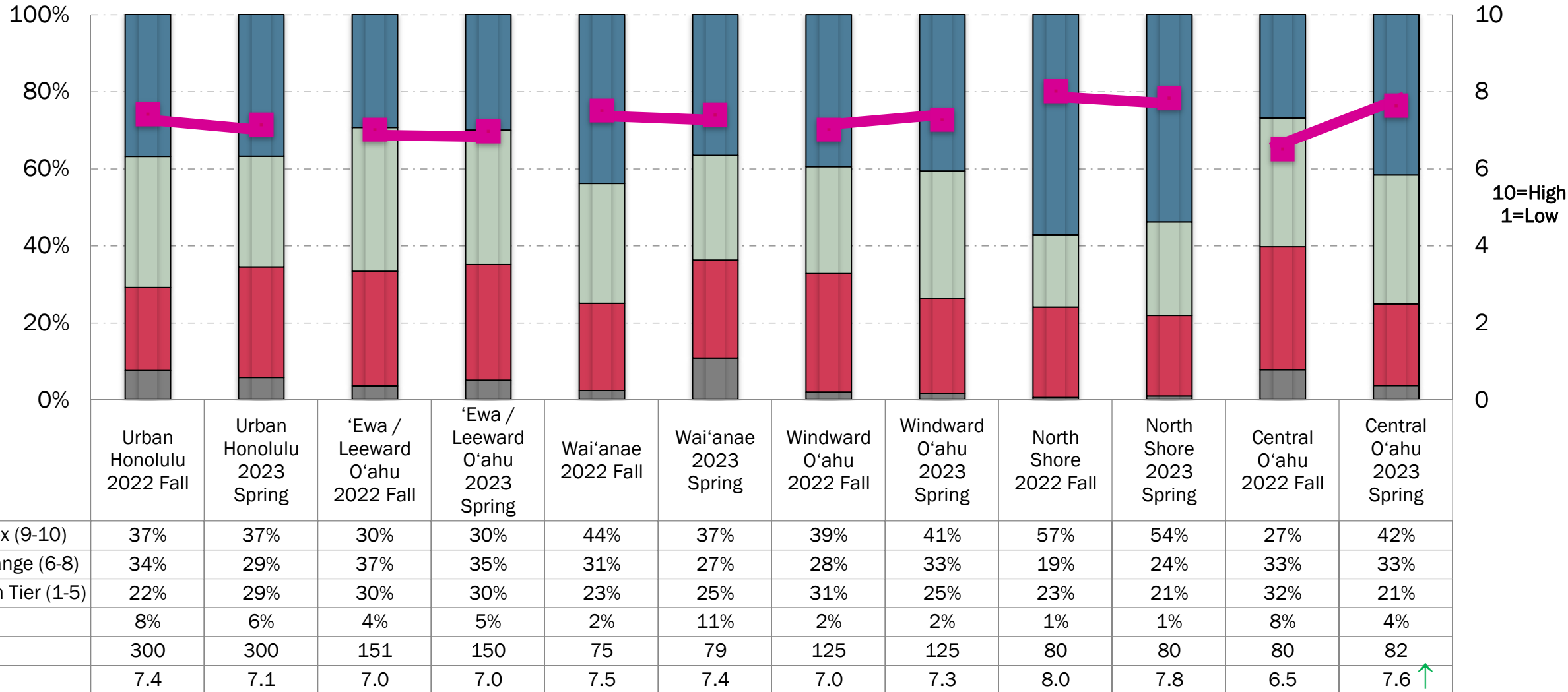
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

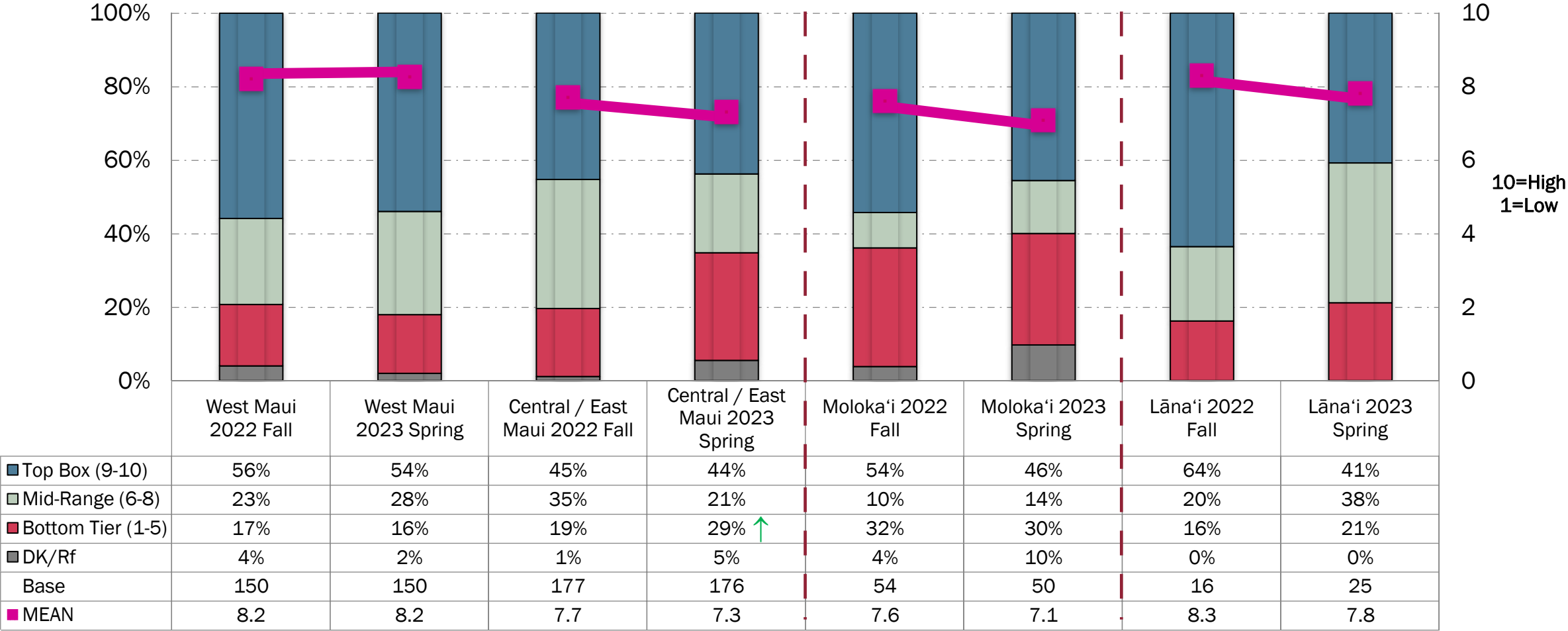


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

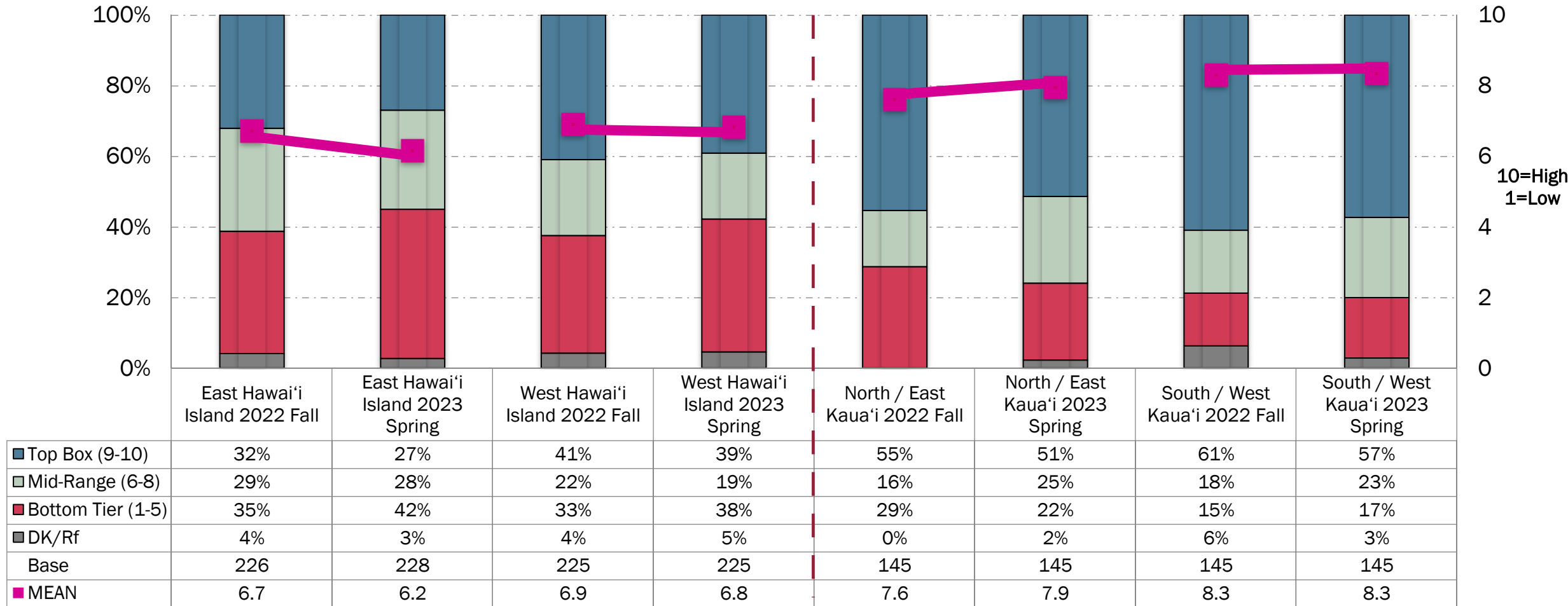


“Do not allow building of additional hotel/condo/timeshare units on my island” - *By Area (Maui County)*



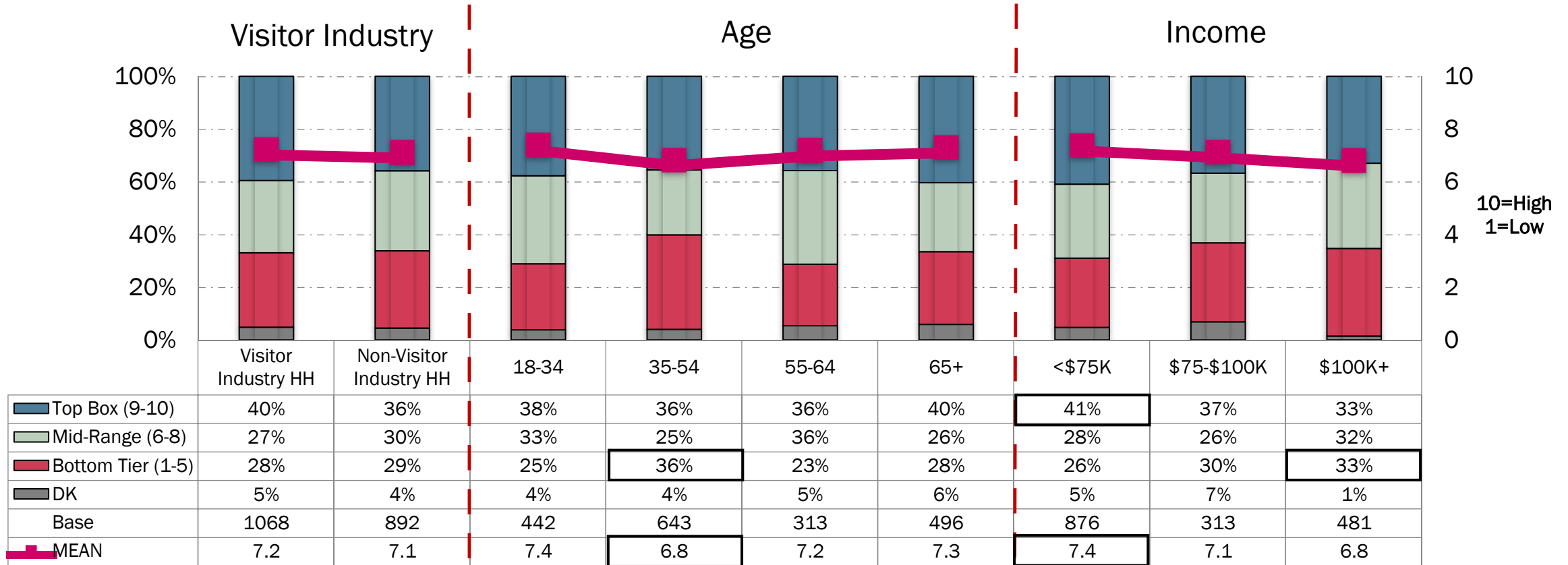
Q7. Legally, the state of Hawaiʻi is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



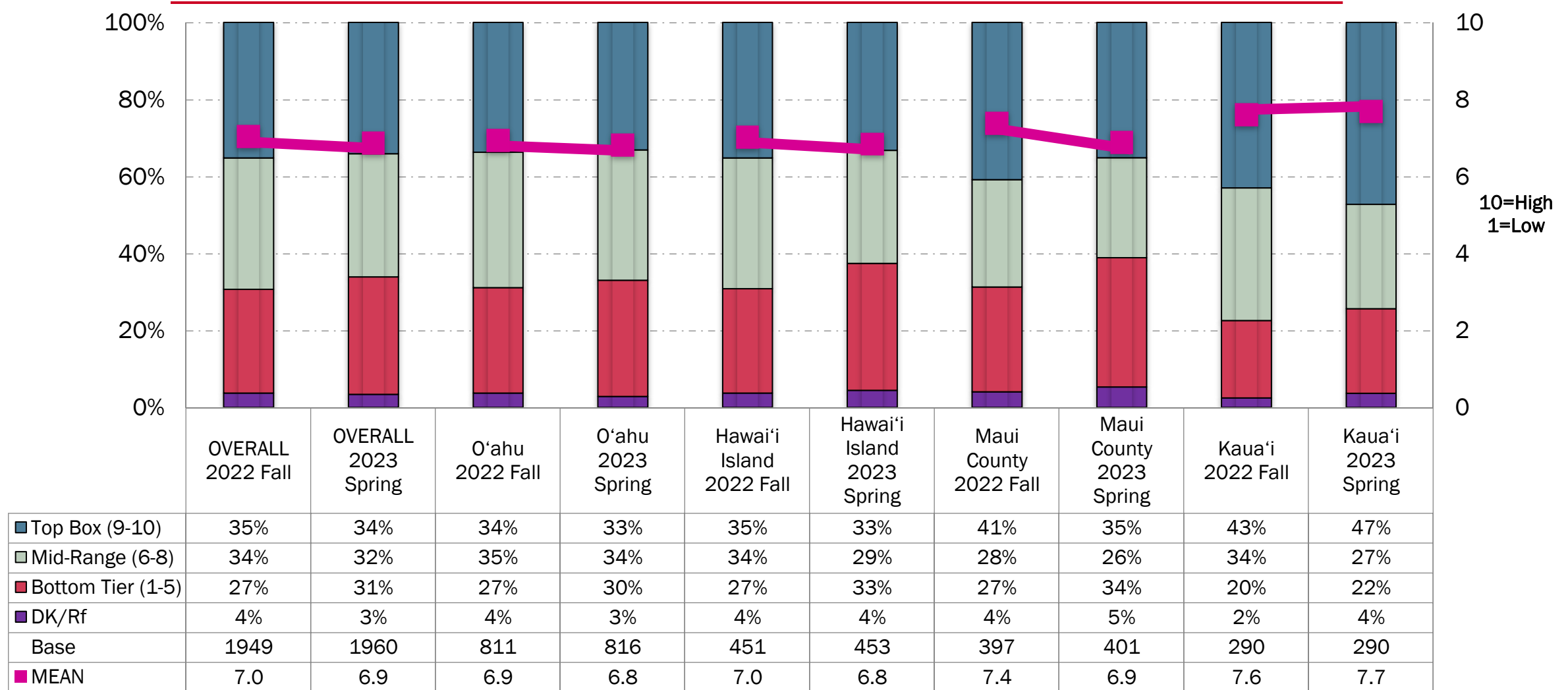
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



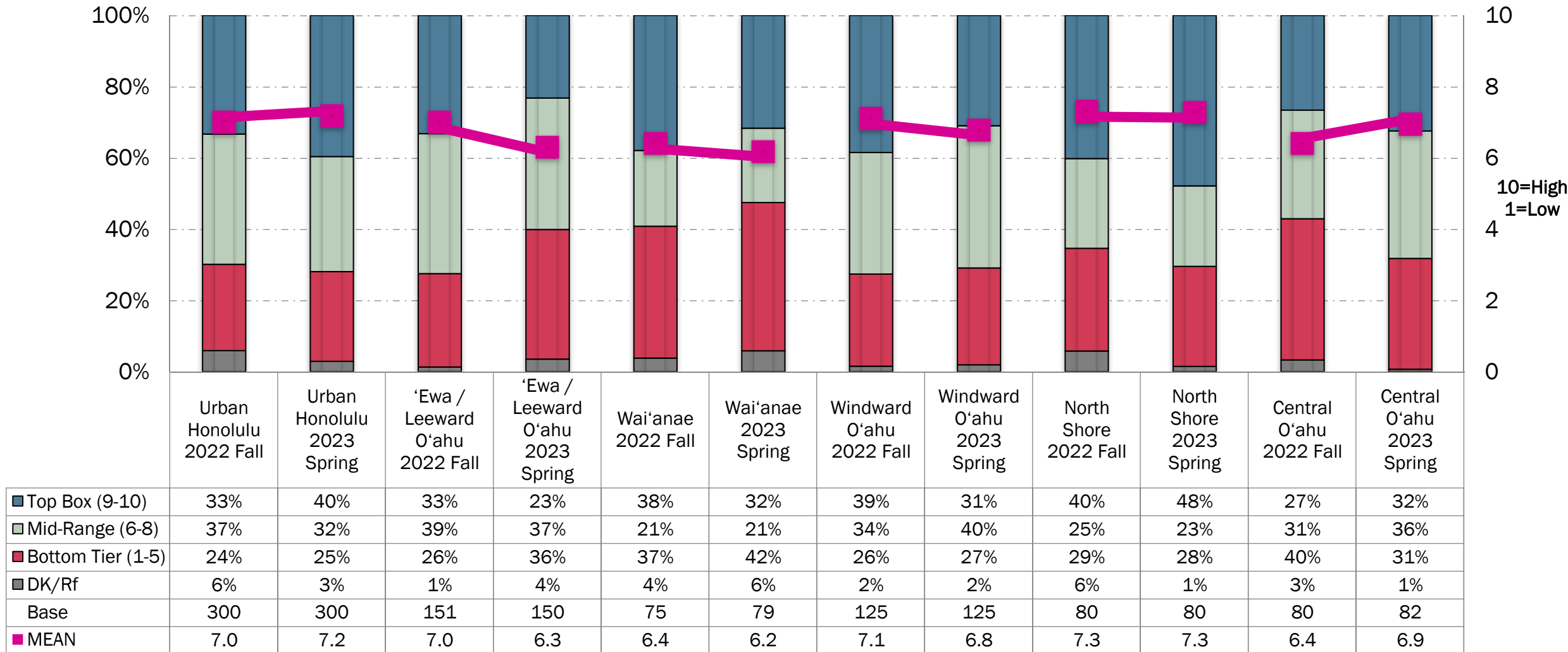
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



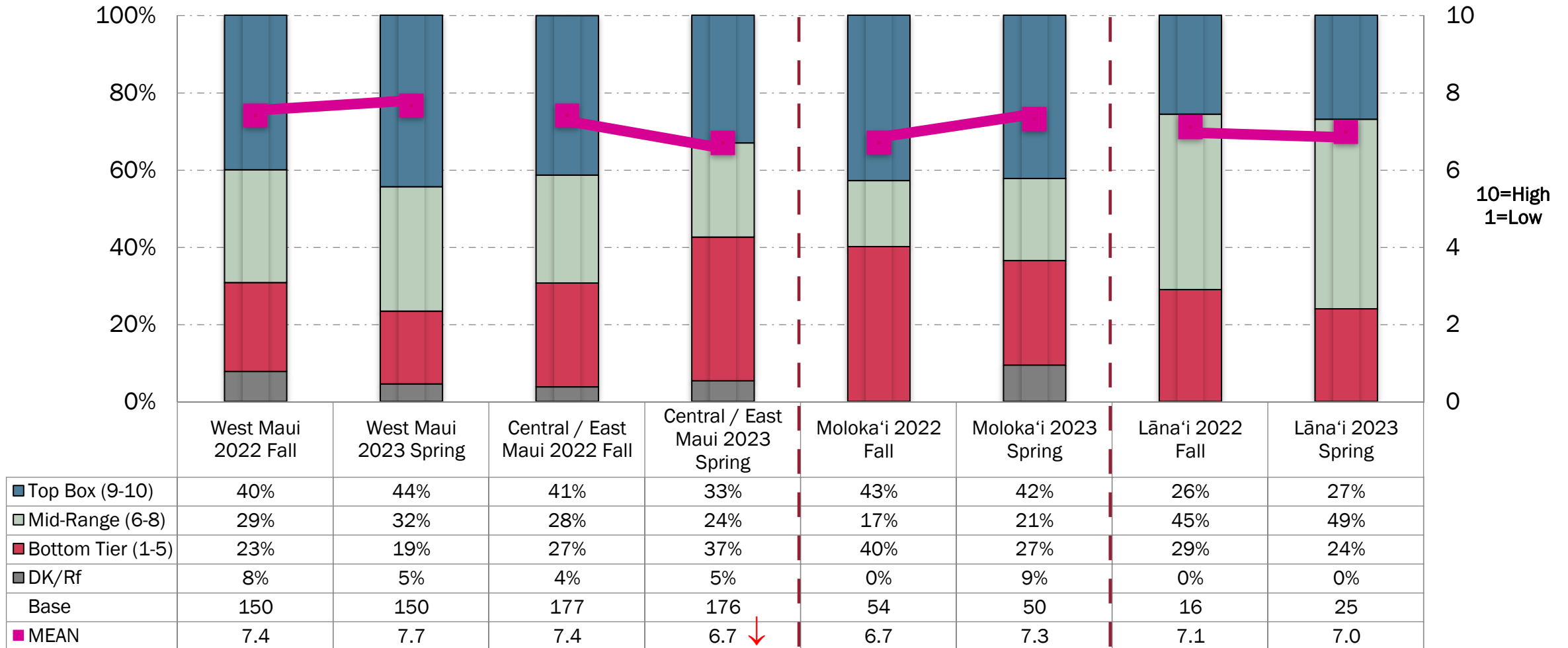
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

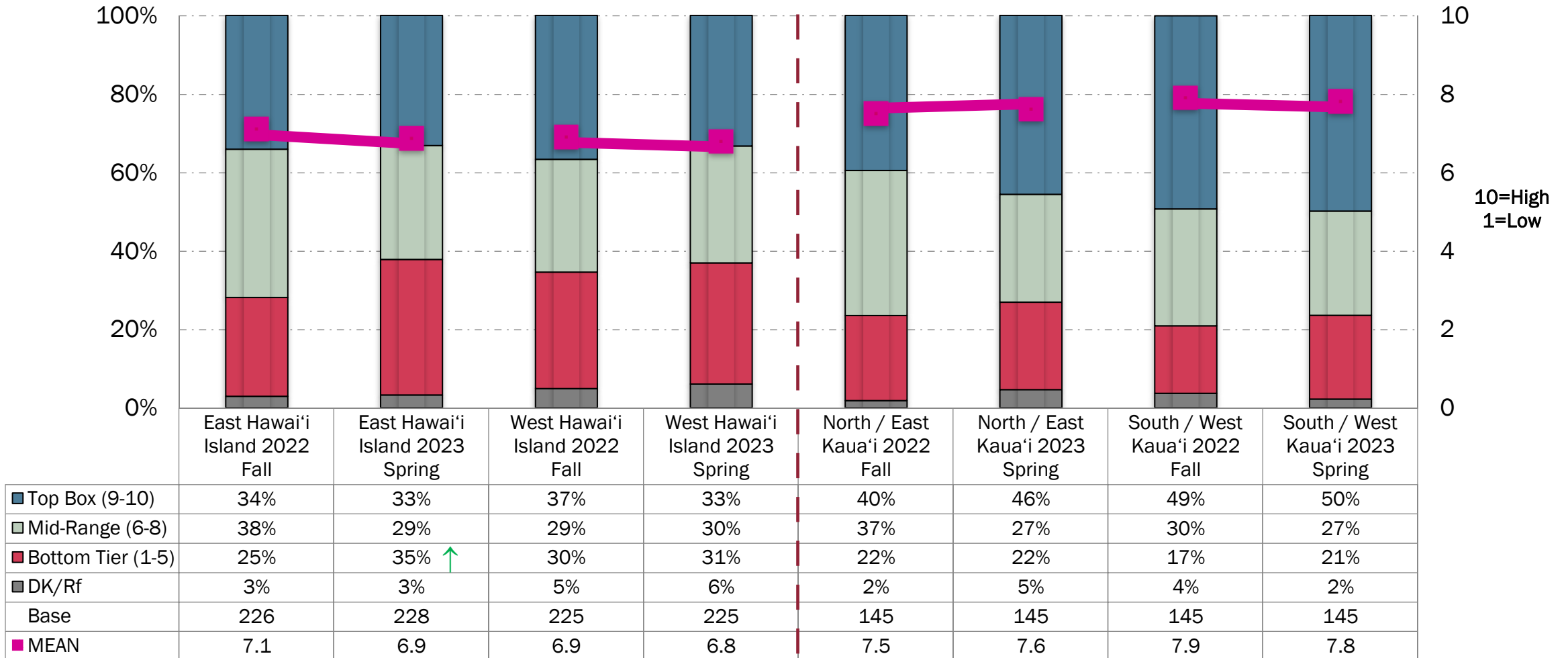


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Charge visitor access fees to state parks and trails” – By Area (Maui County)

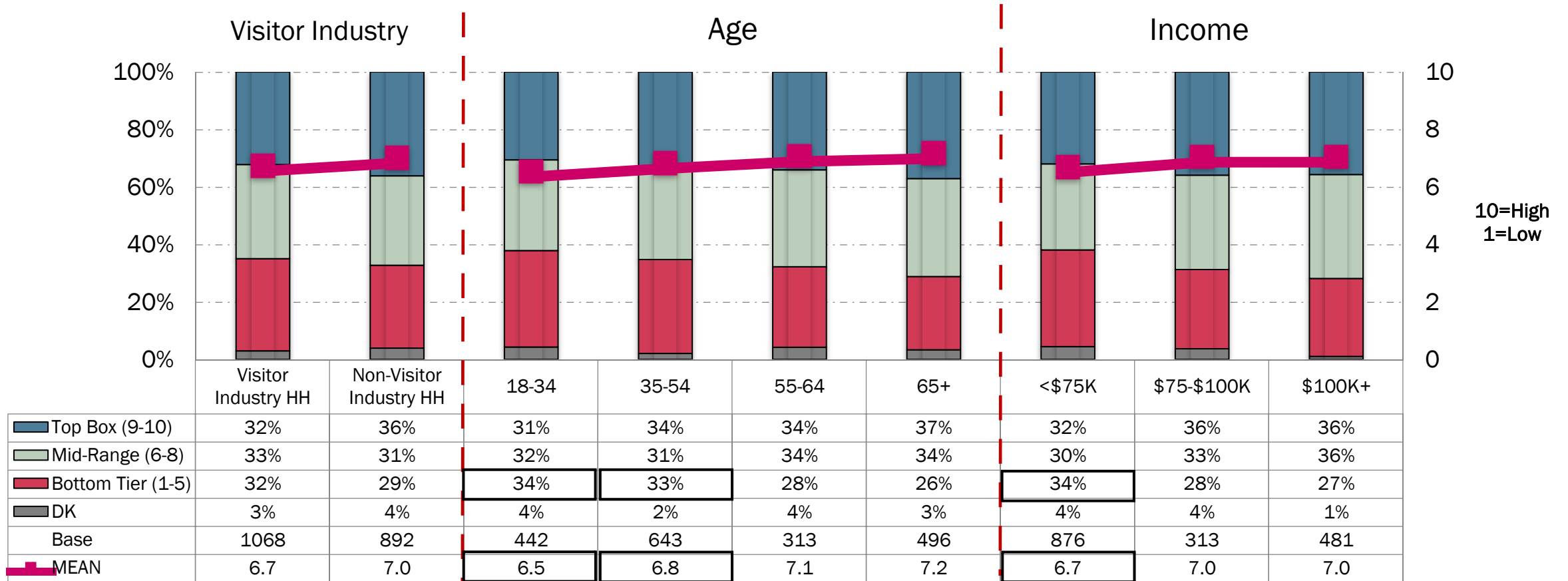


“Charge visitor access fees to state parks and trails” – *By Area (Hawai‘i Island & Kaua‘i)*



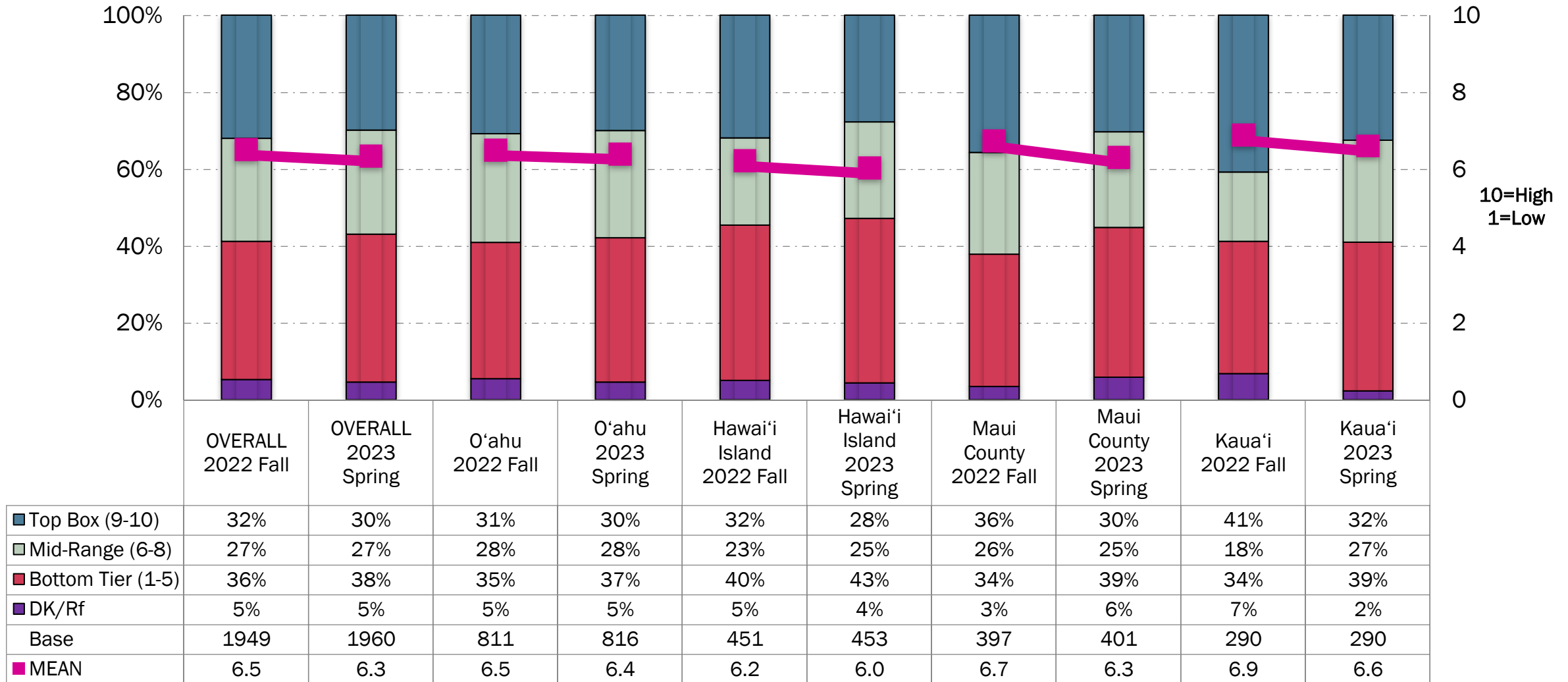
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



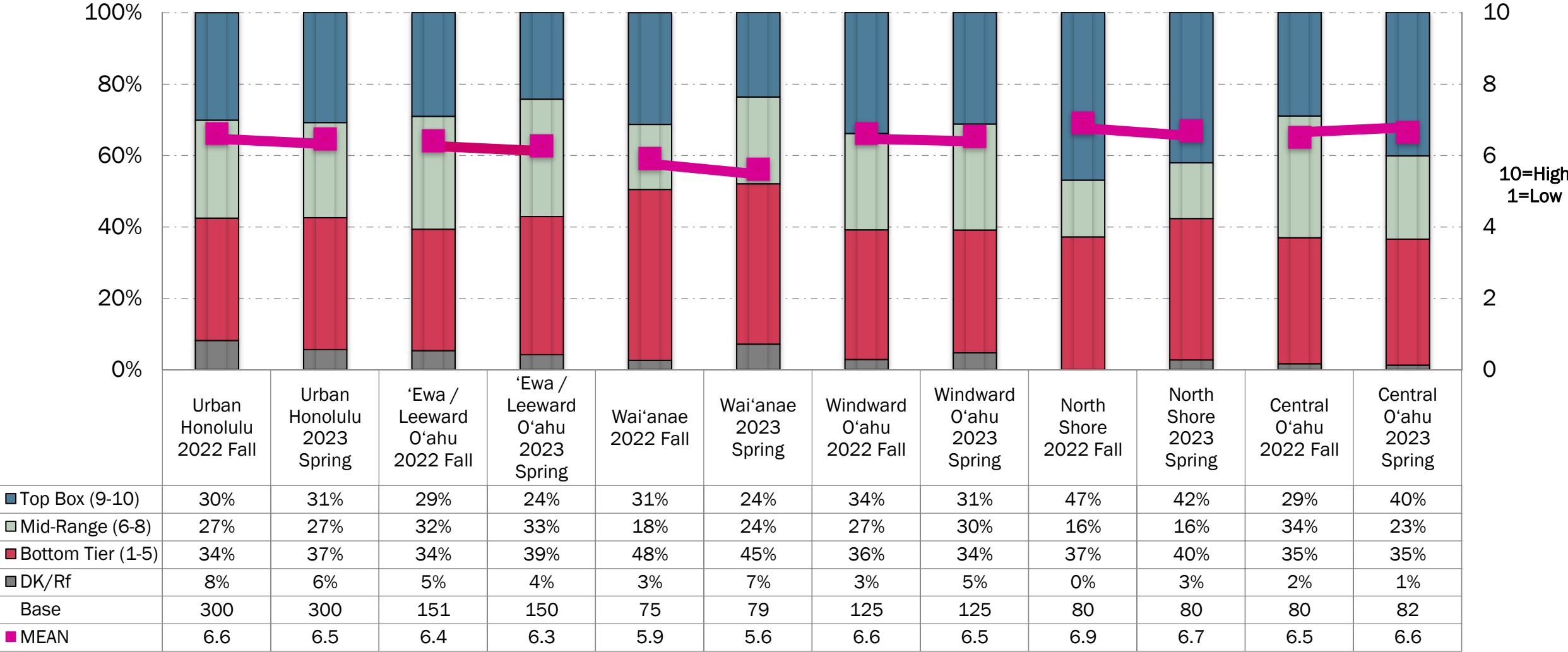
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



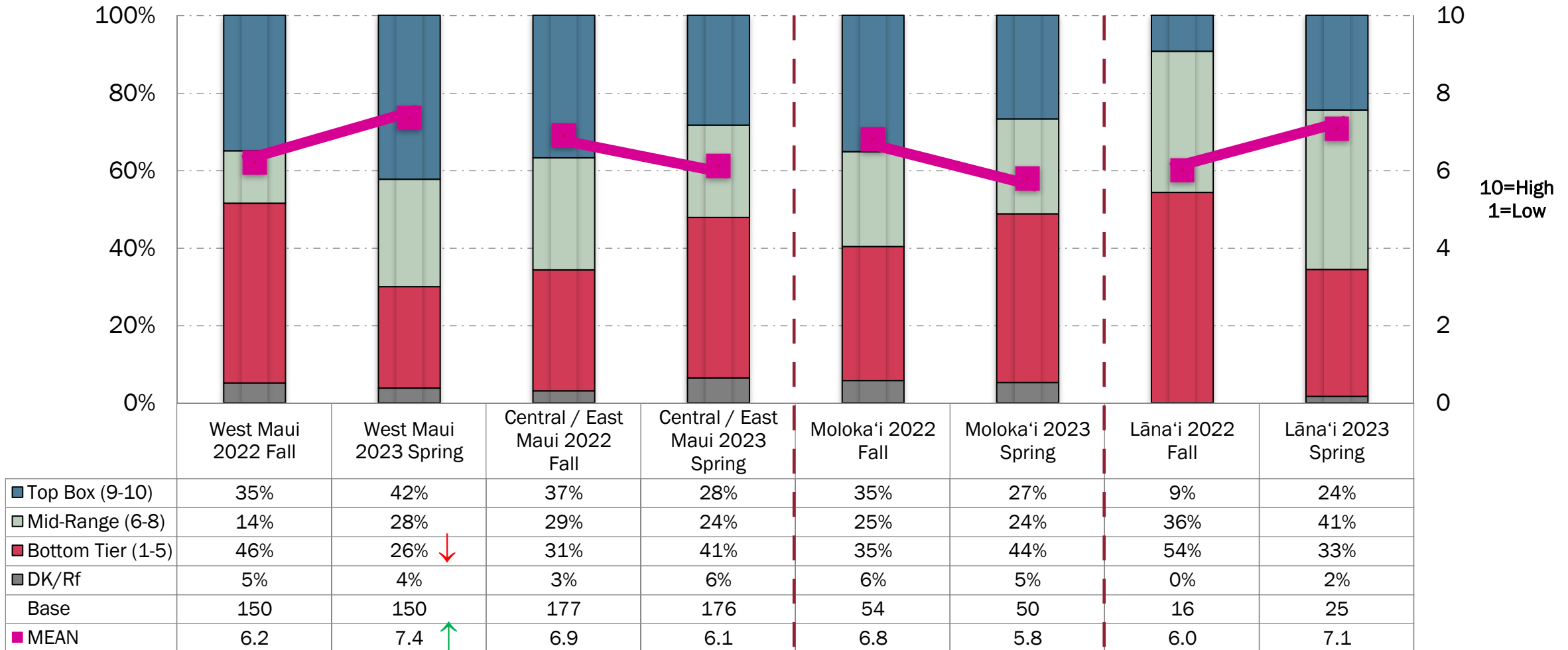
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

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



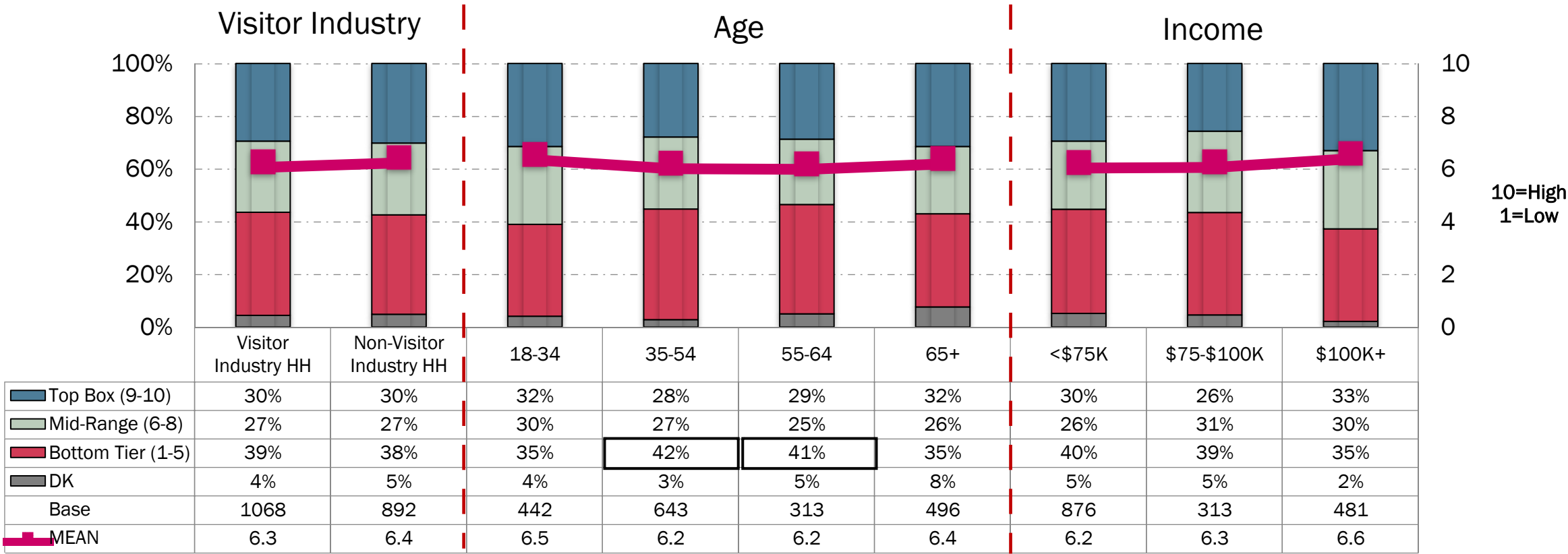
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



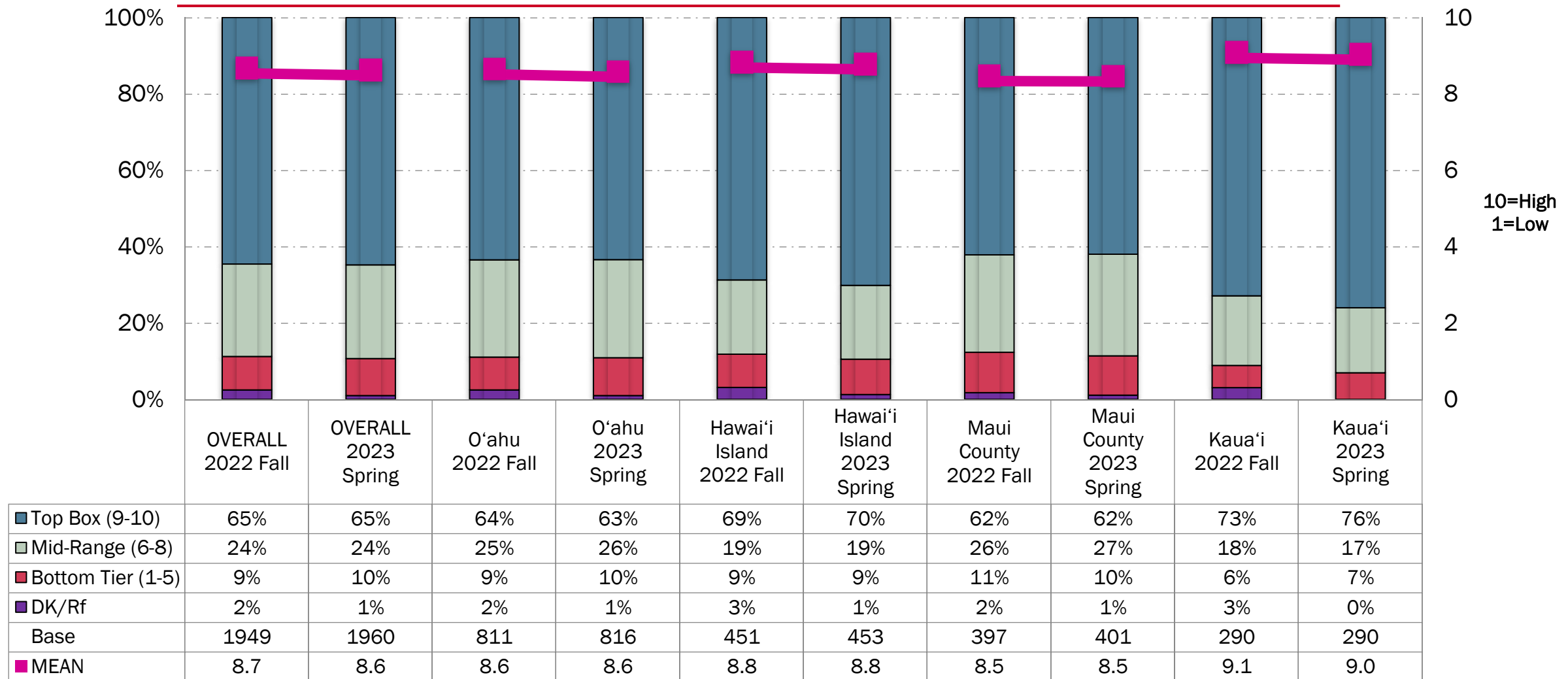
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



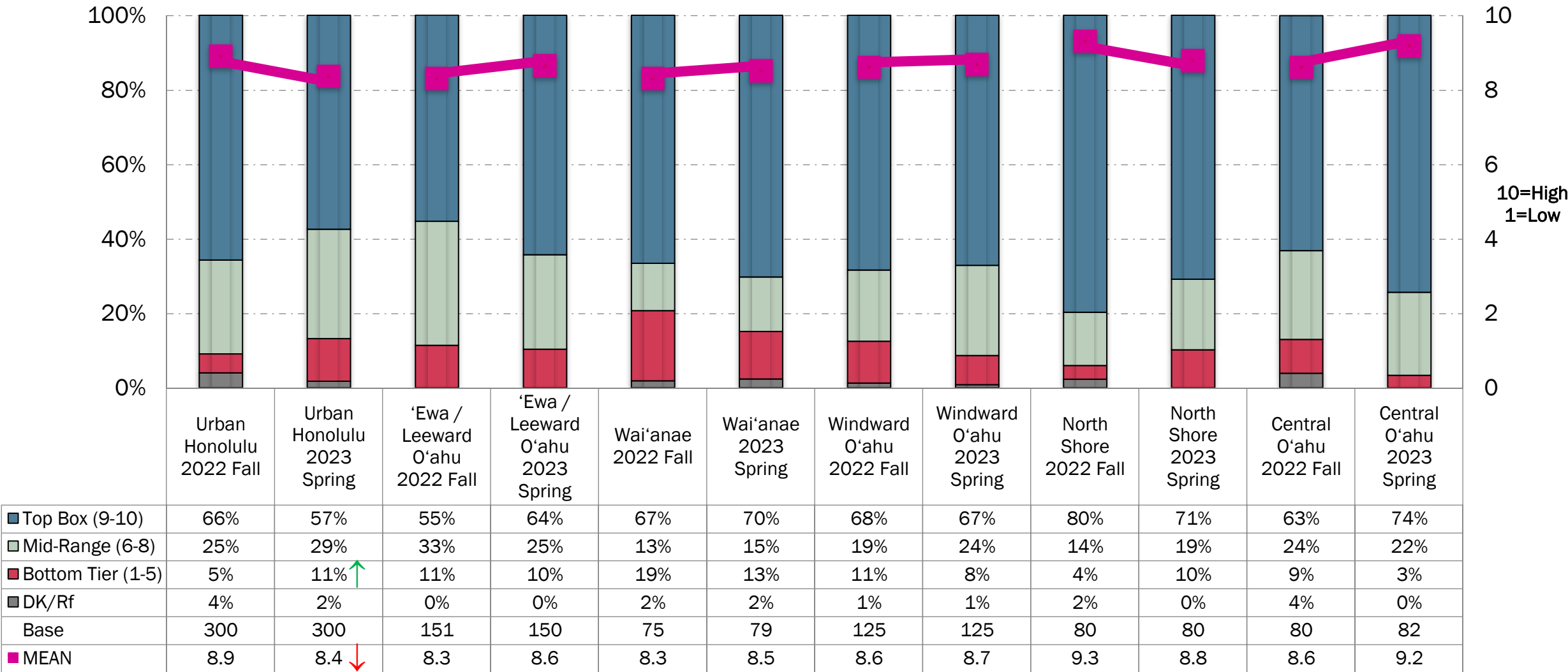
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



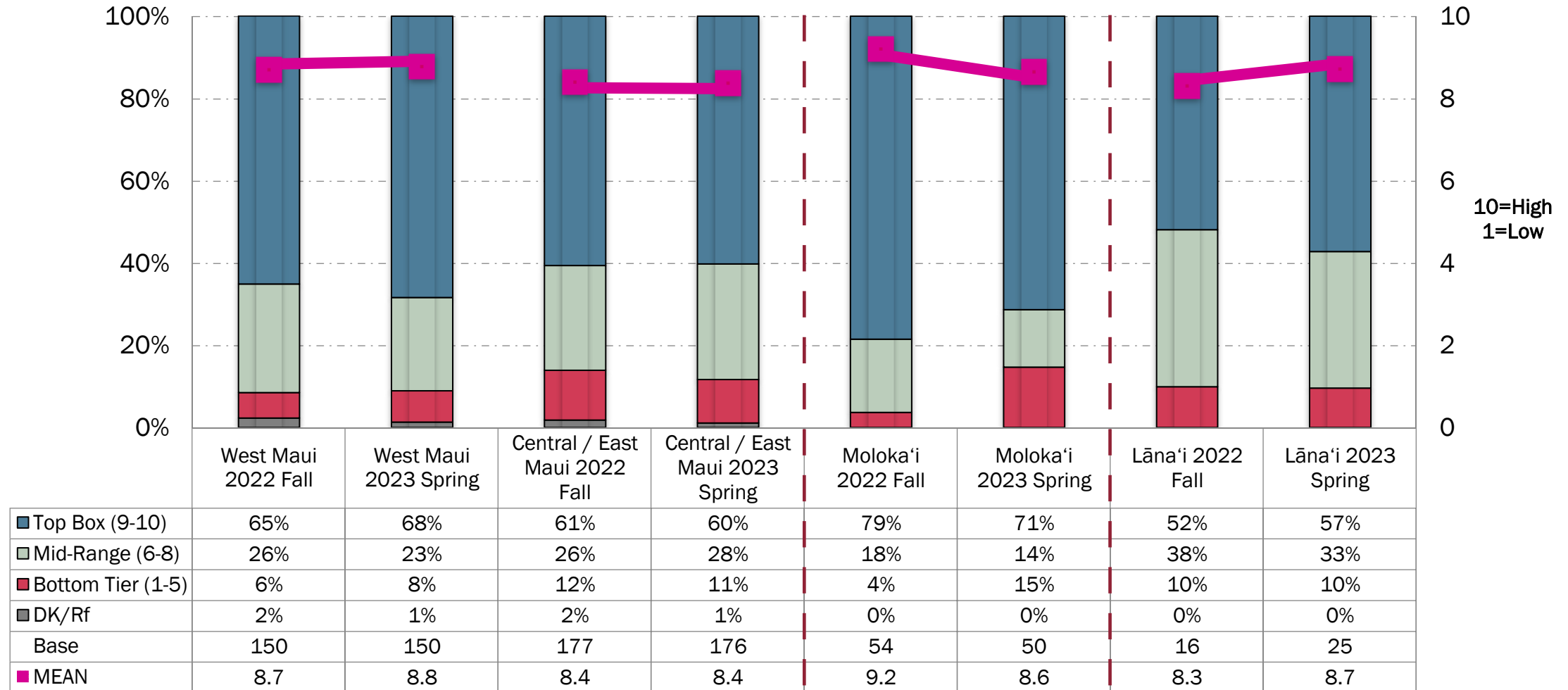
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



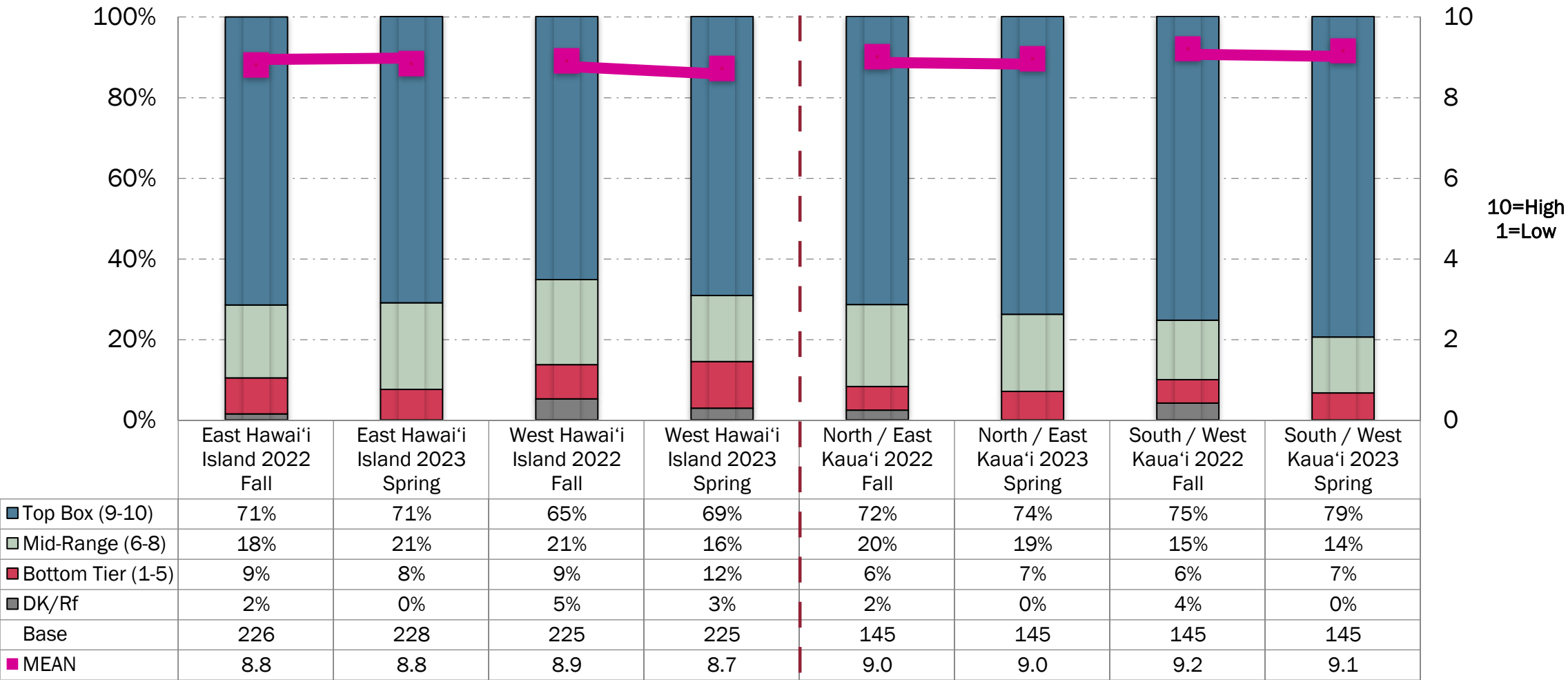
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“Educate visitors and residents to mālama the islands and each other” - *By Area (Maui County)*



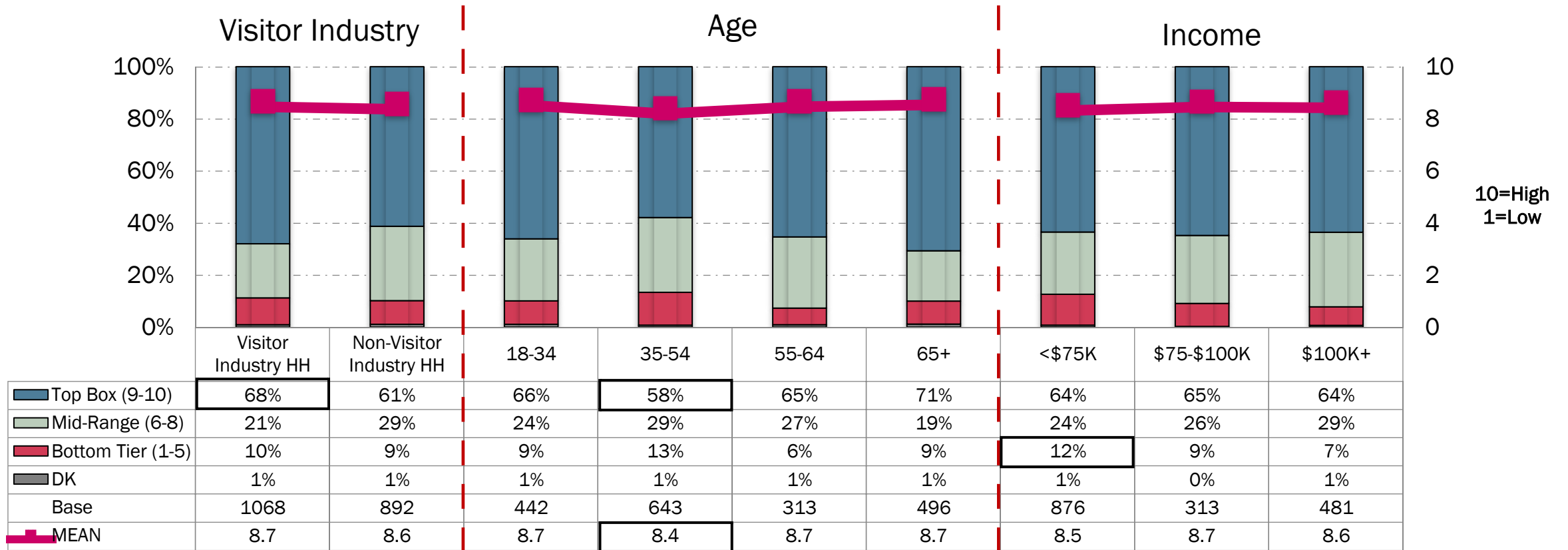
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“Educate visitors and residents to mālama the islands and each other” - *By Area (Hawai‘i Island & Kaua‘i)*



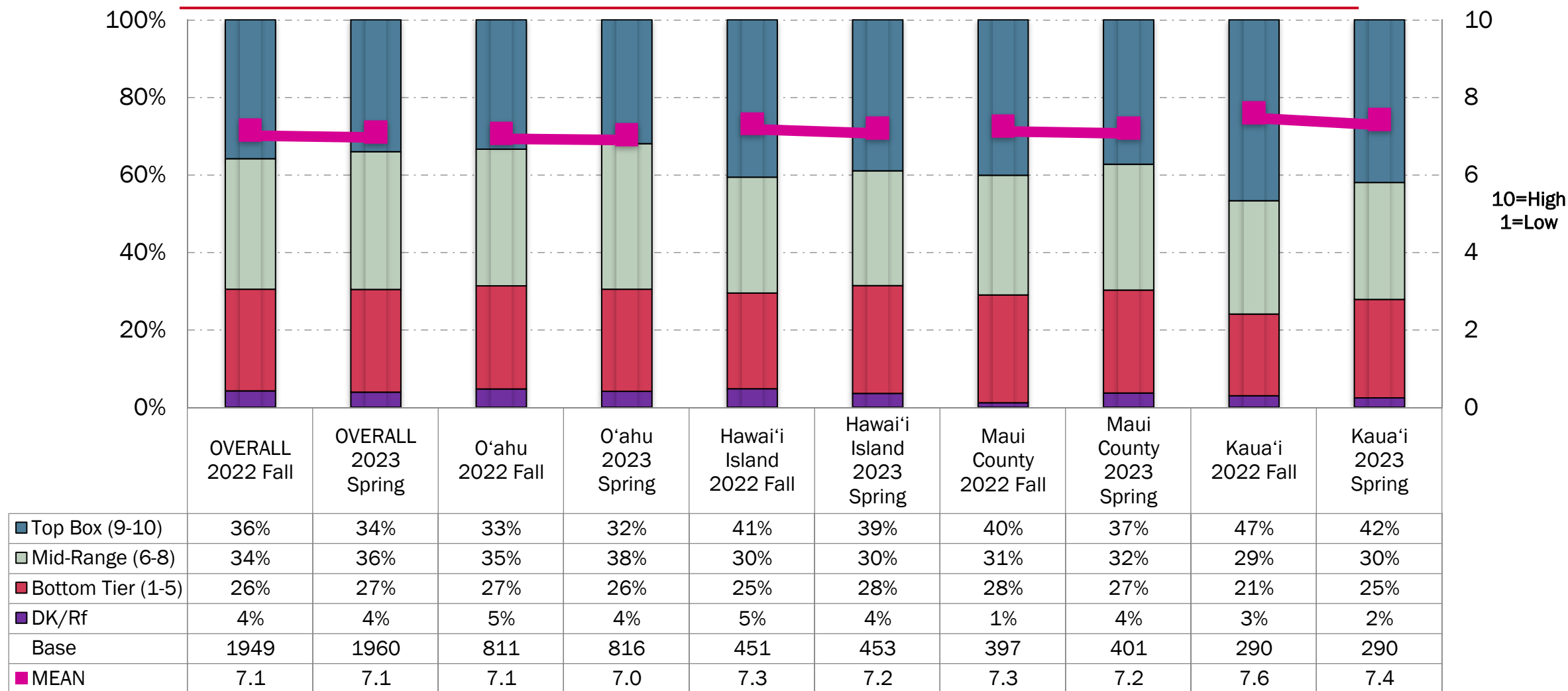
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



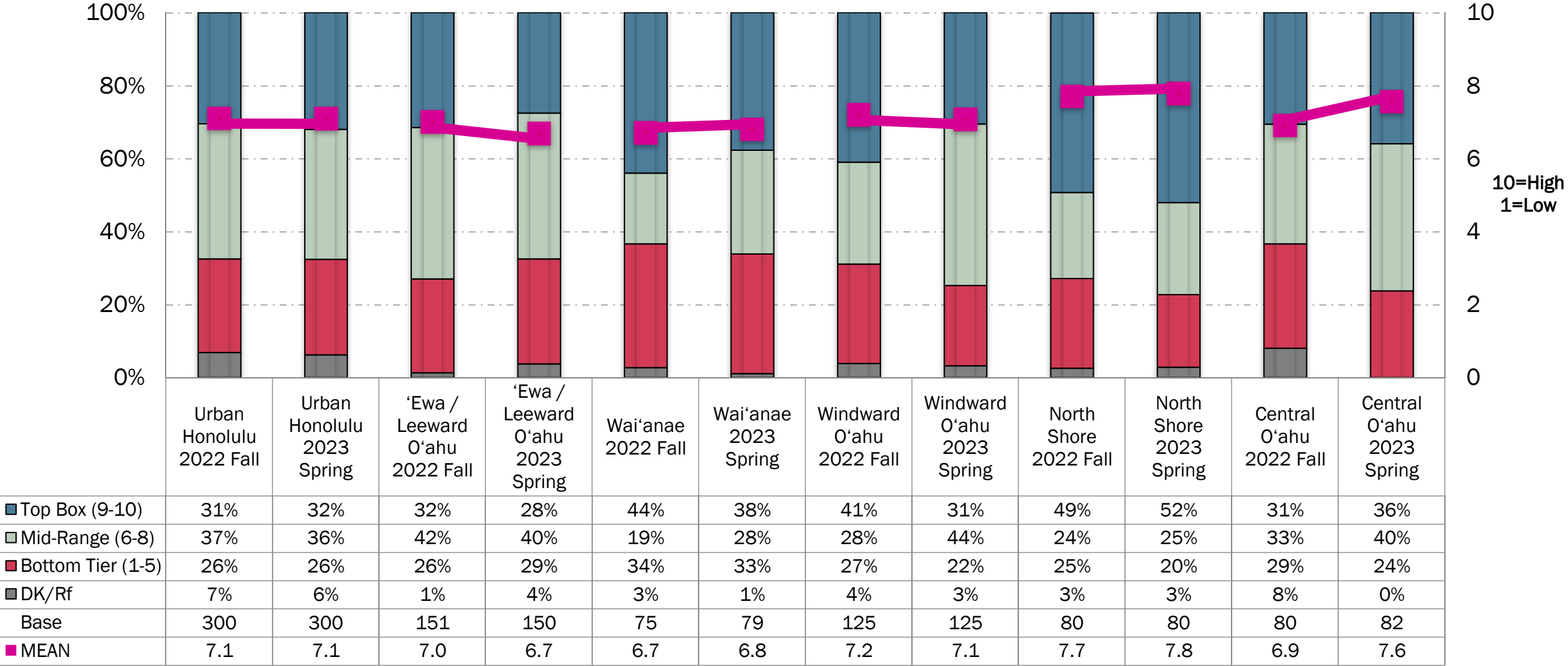
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



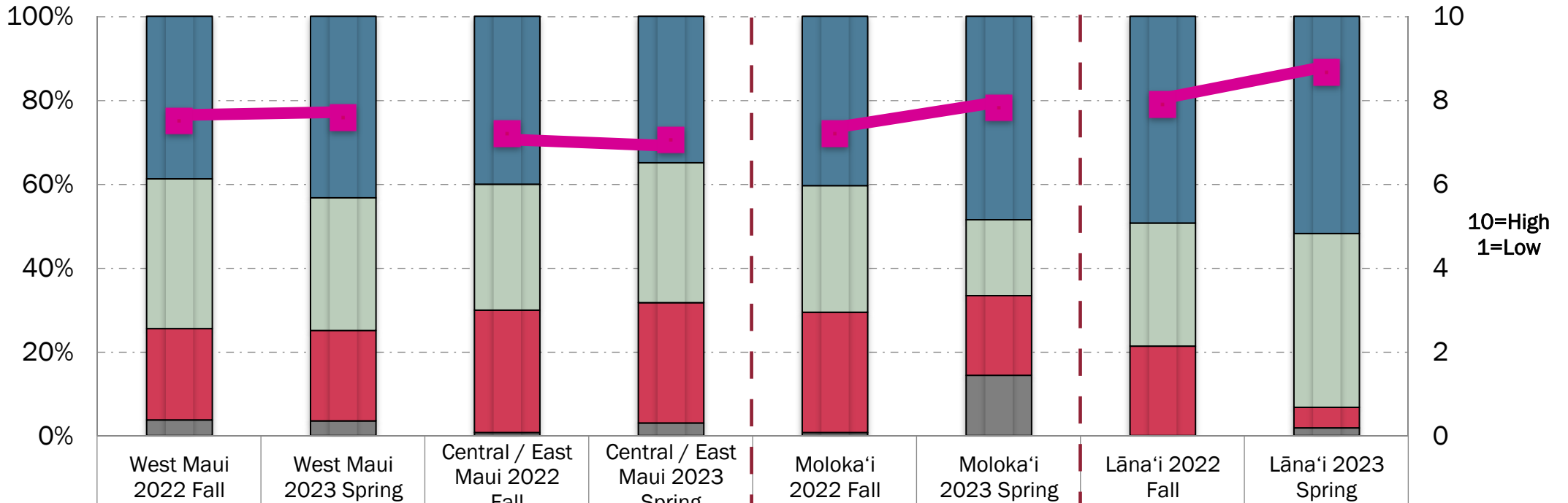
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“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 (Maui County)*



■ Top Box (9-10)	39%	43%	40%	35%	40%	49%	49%	52%
■ Mid-Range (6-8)	36%	32%	30%	33%	30%	18%	29%	41%
■ Bottom Tier (1-5)	22%	22%	29%	29%	29%	19%	21%	5%
■ DK/Rf	4%	4%	1%	3%	1%	14%	0%	2%
Base	150	150	177	176	54	50	16	25
■ MEAN	7.5	7.6	7.2	7.0	7.2	7.8	7.9	8.7

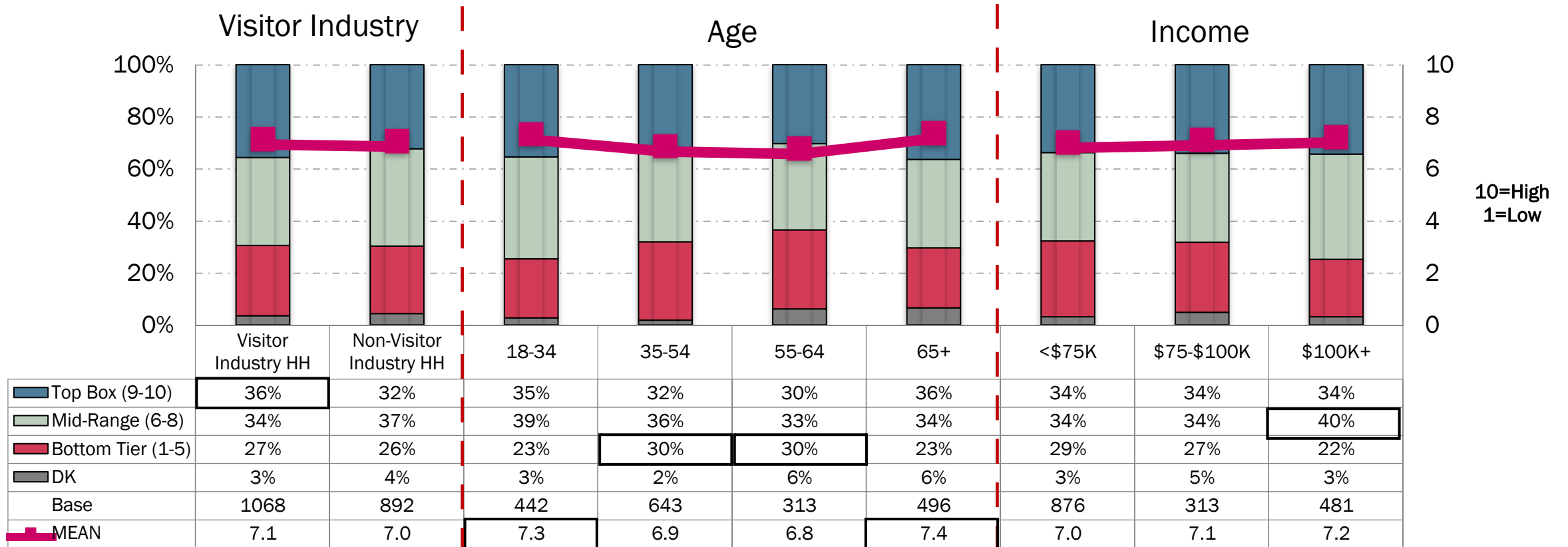
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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

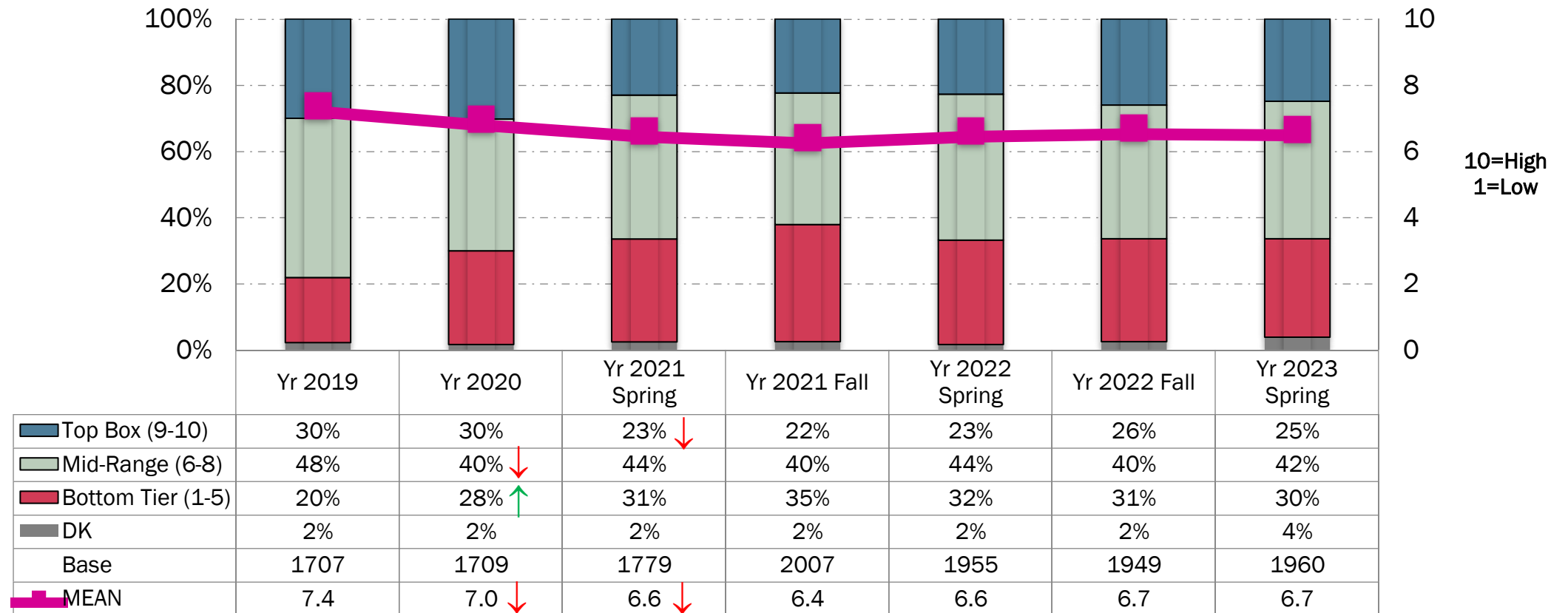


Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



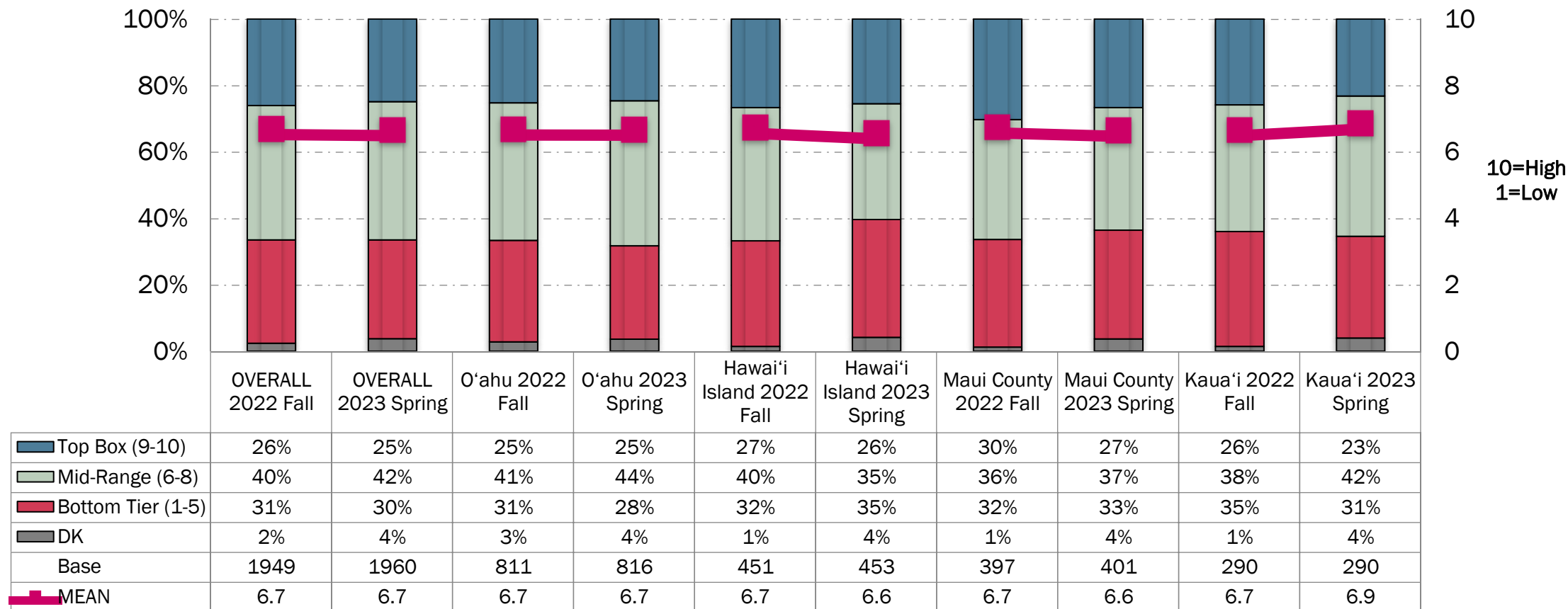
General Perceptions of the Visitor Industry

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



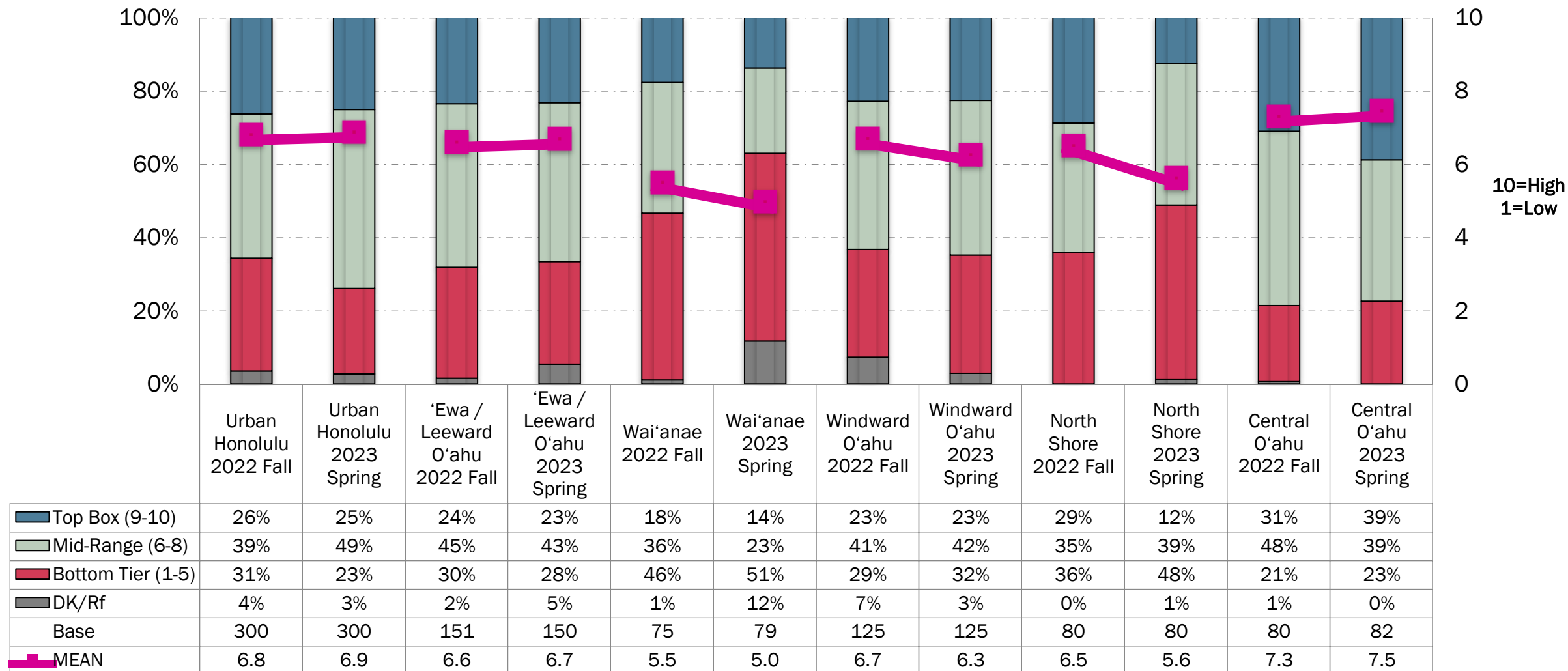
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



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

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



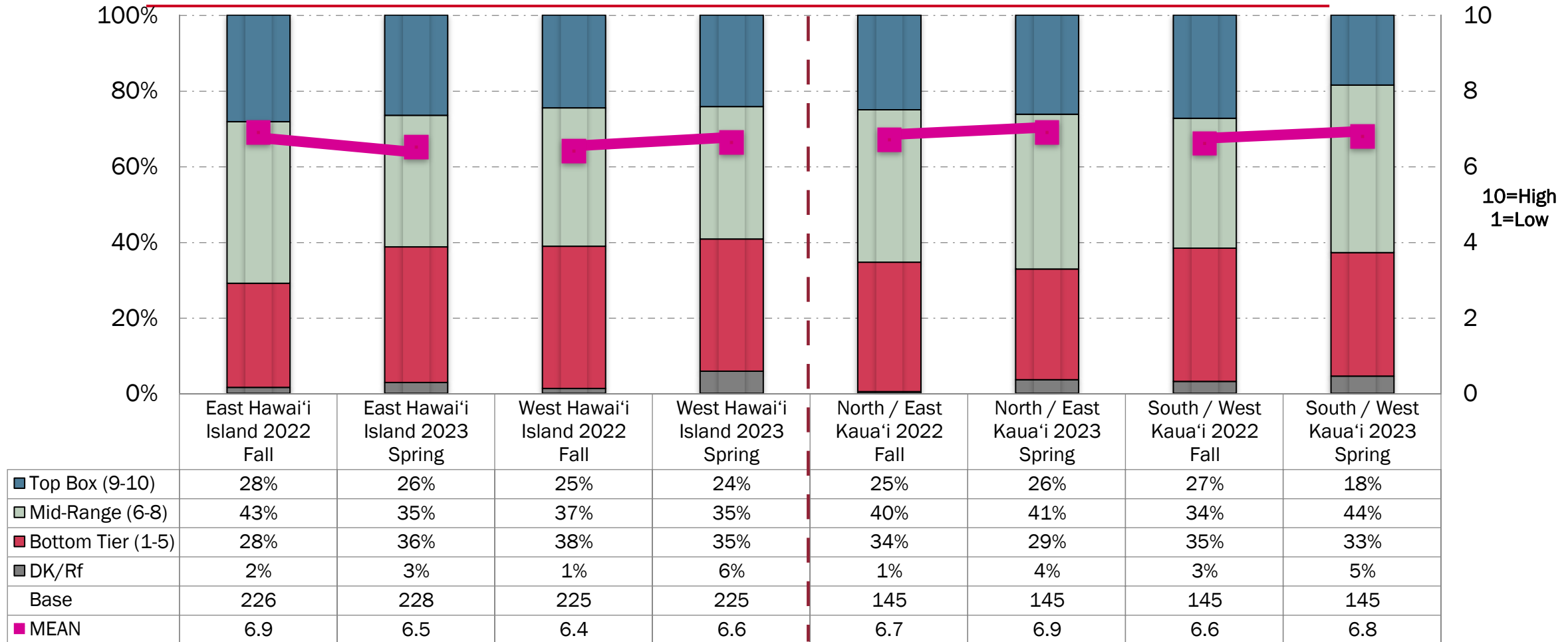
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



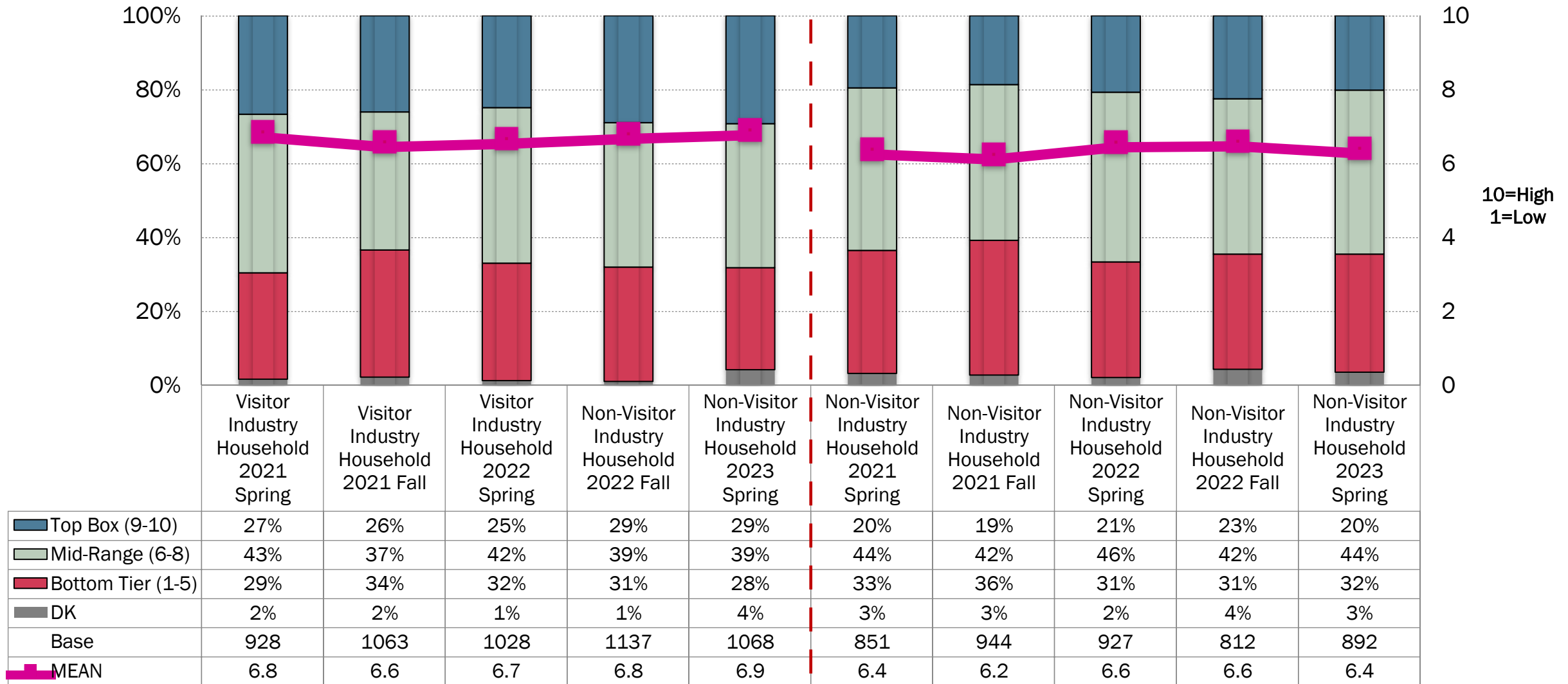
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



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

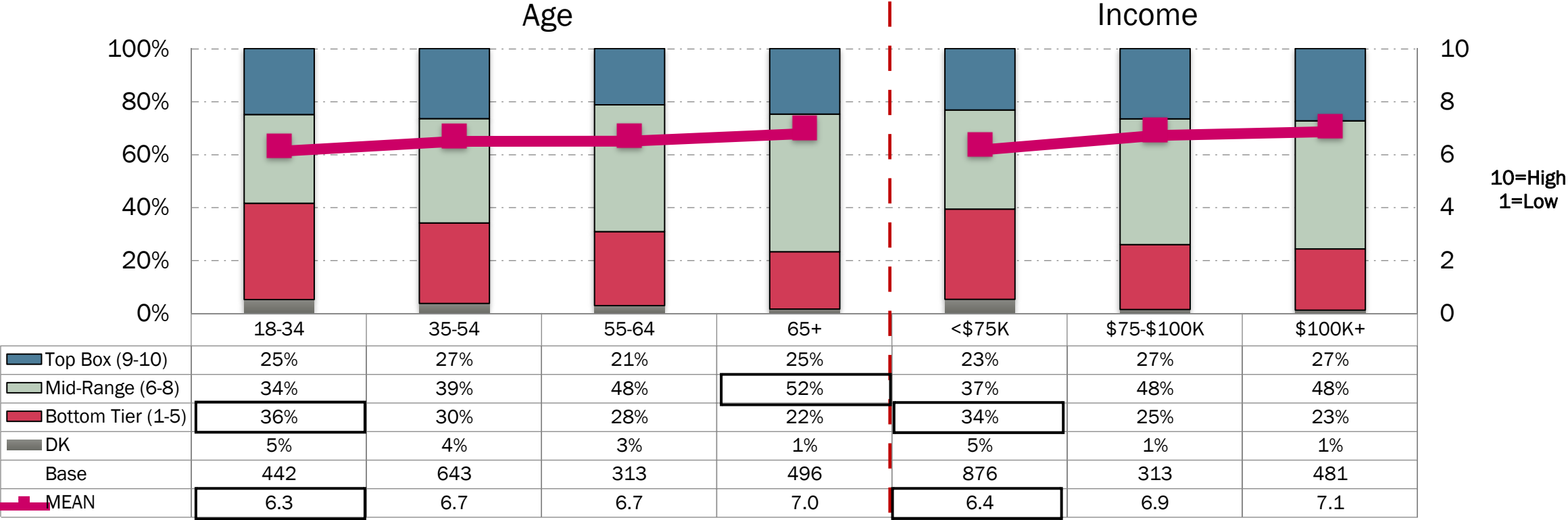
Perception of Tourism Industry in Hawai'i - *Visitor Industry Household vs Non-Visitor Industry Household*



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

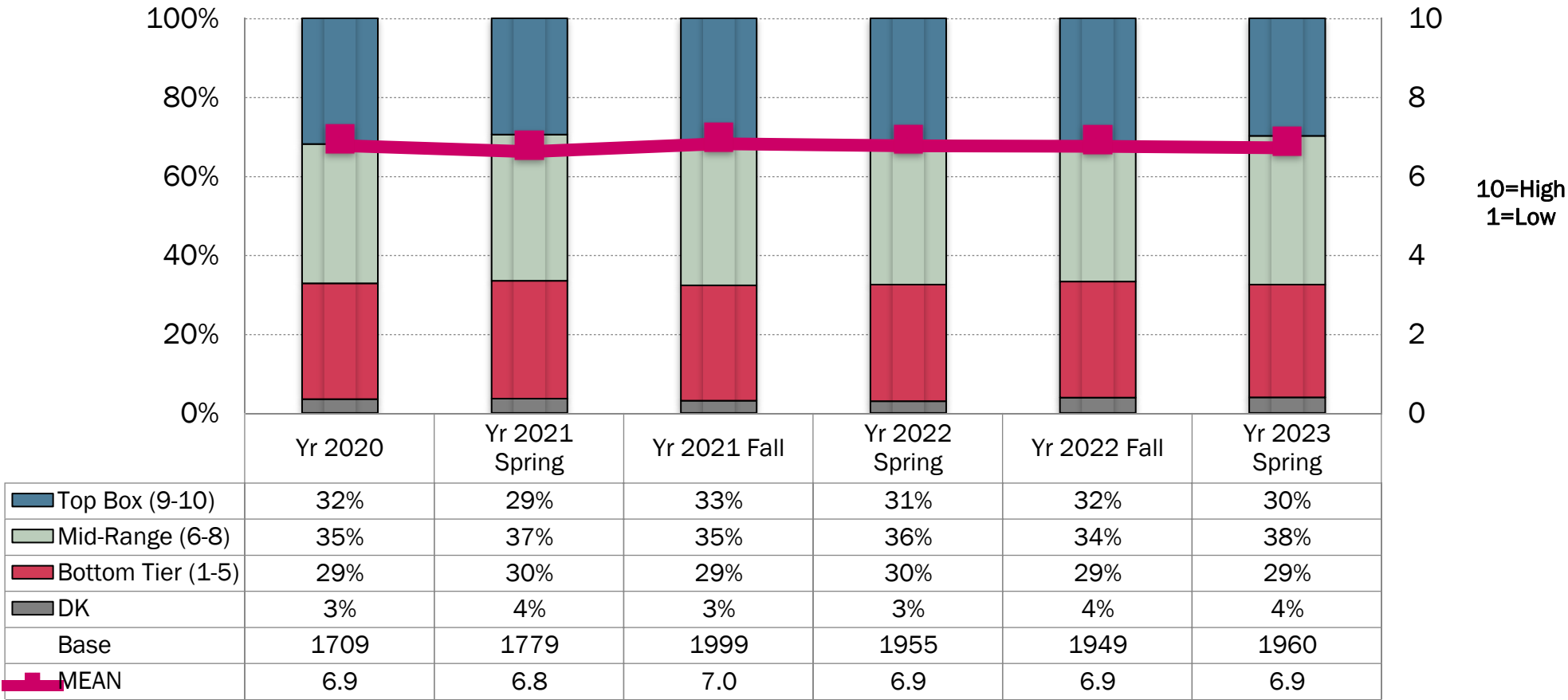
Perception of Tourism Industry in Hawai'i

– *By Demographics*



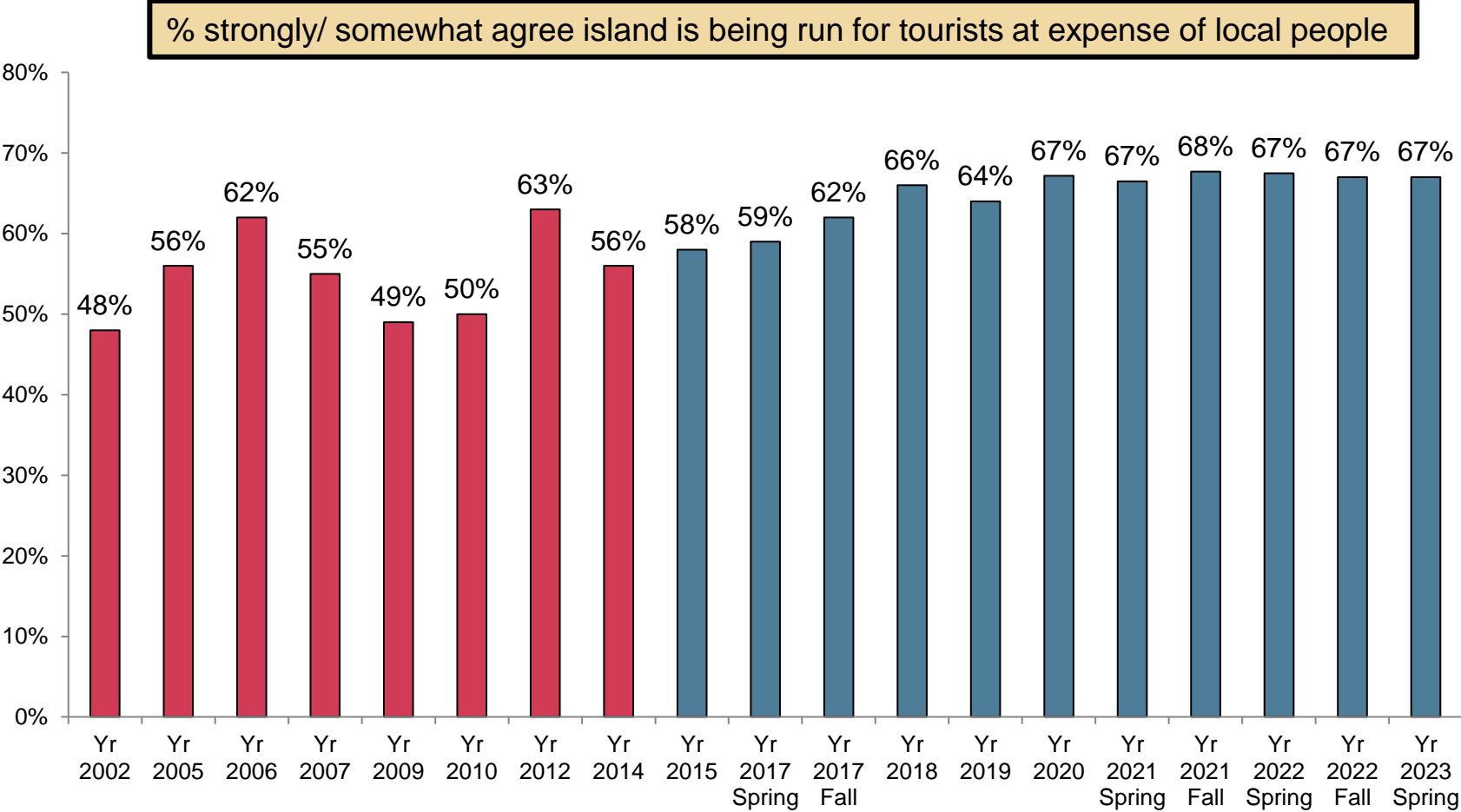
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable At All, please give me your opinion of Tourism as an industry in Hawai'i.

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



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

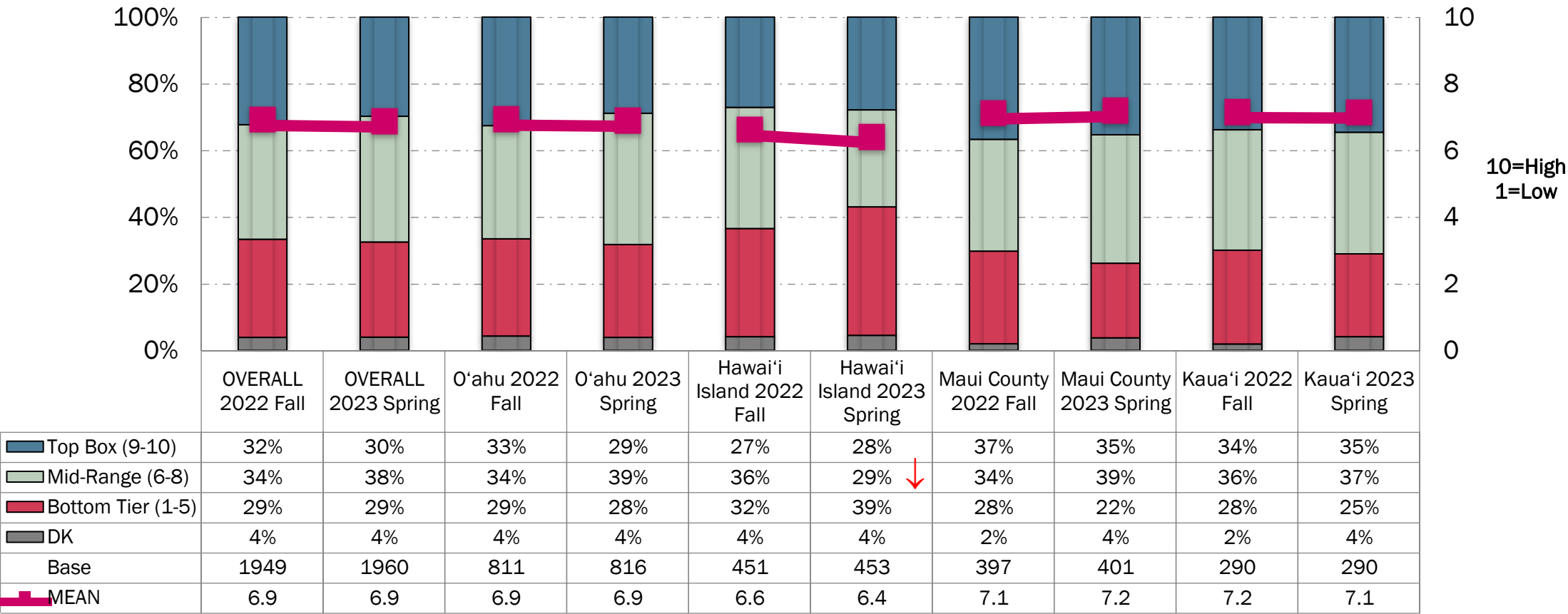
“This island is being run for tourists at the expense of local people” - Overall



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

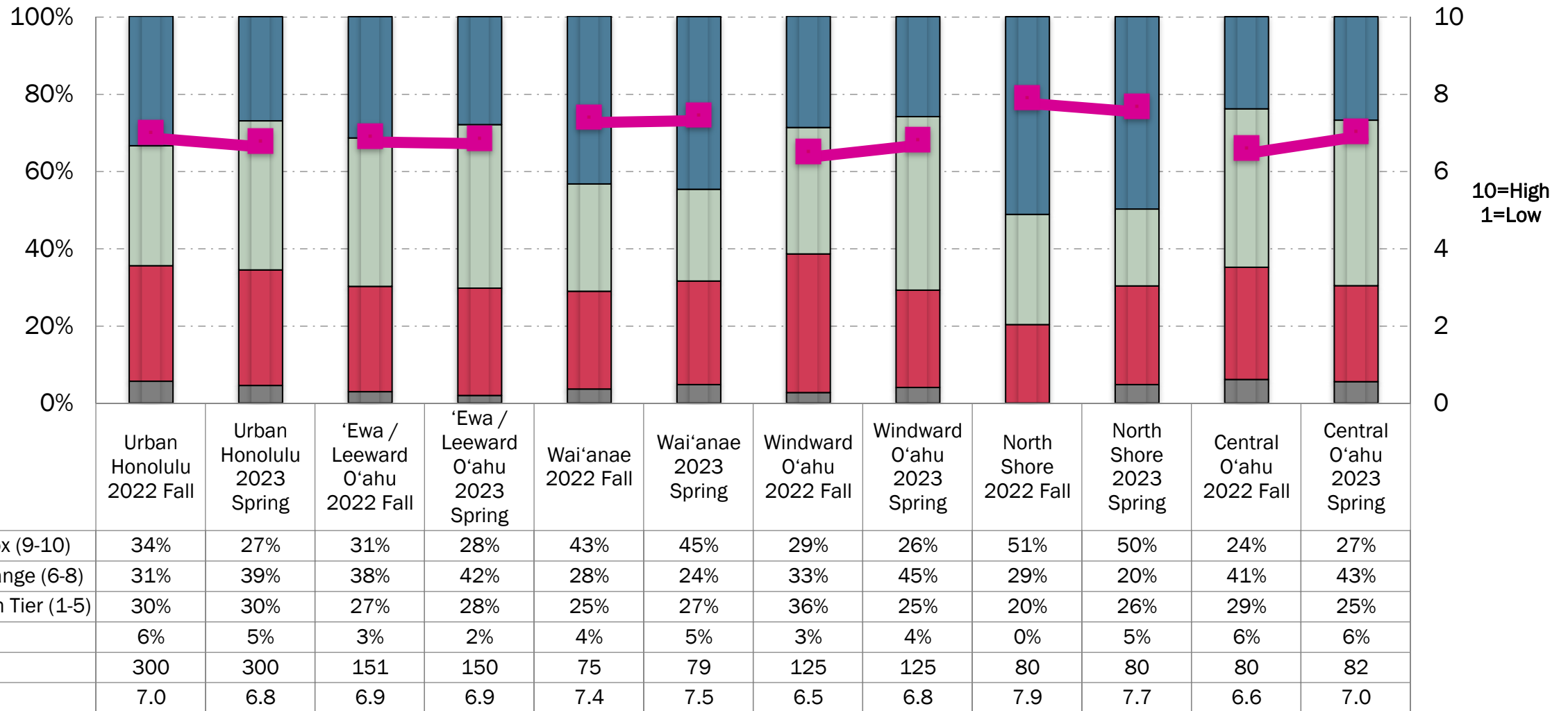
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



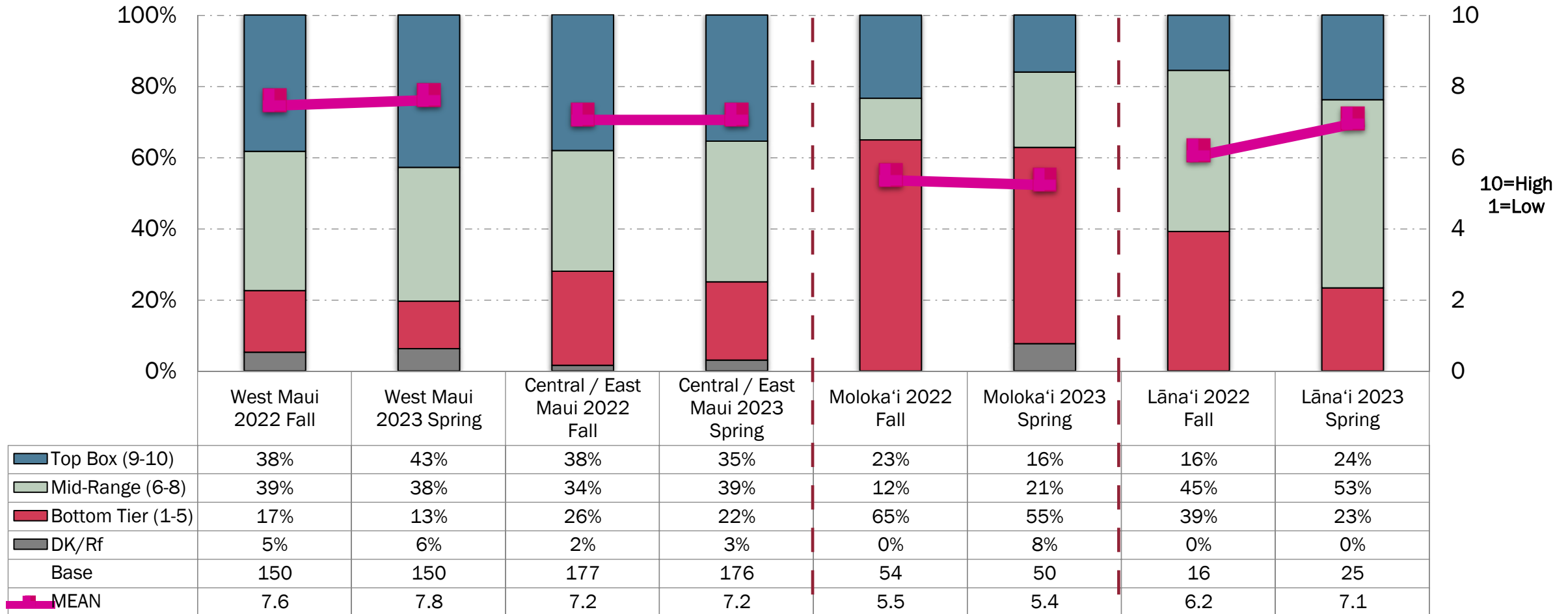
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“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 (Maui County)*



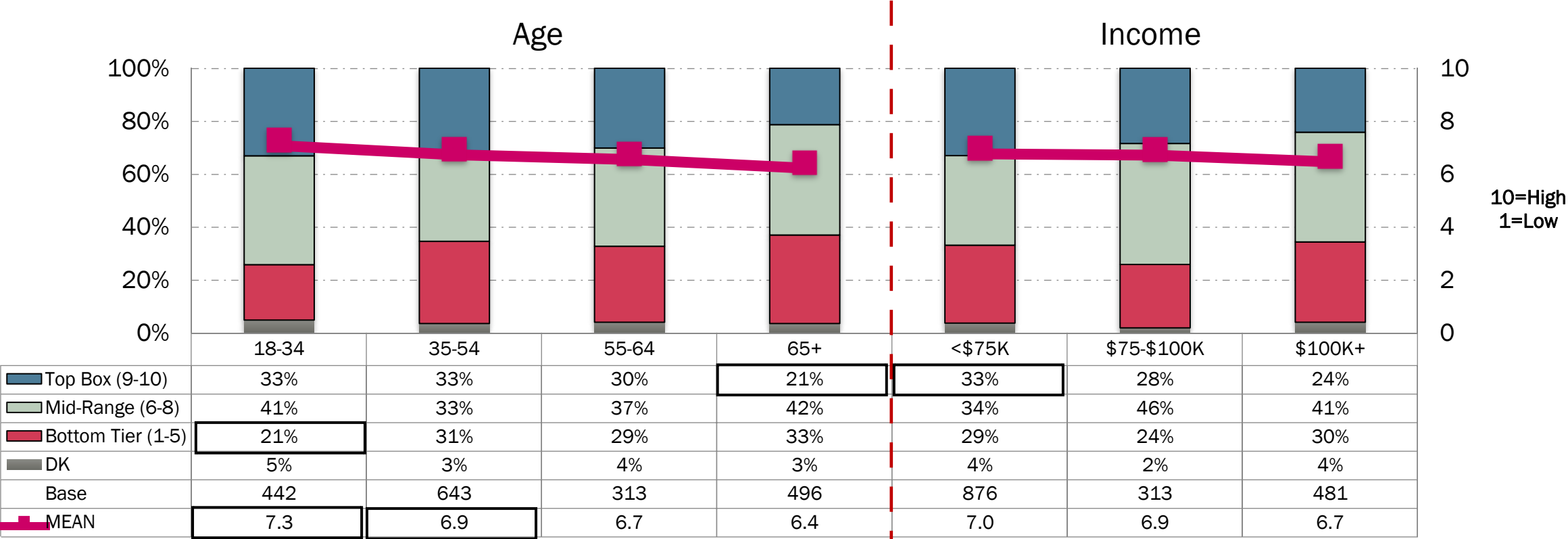
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



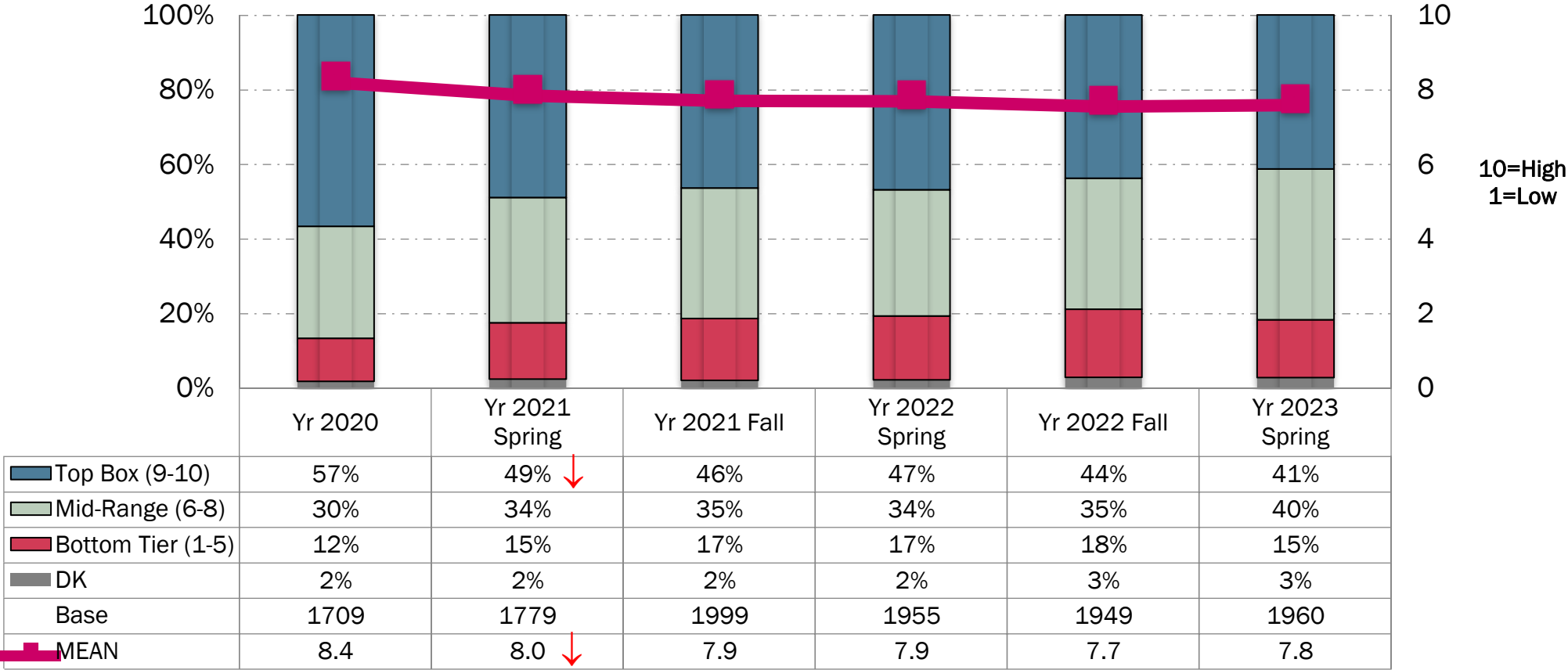
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



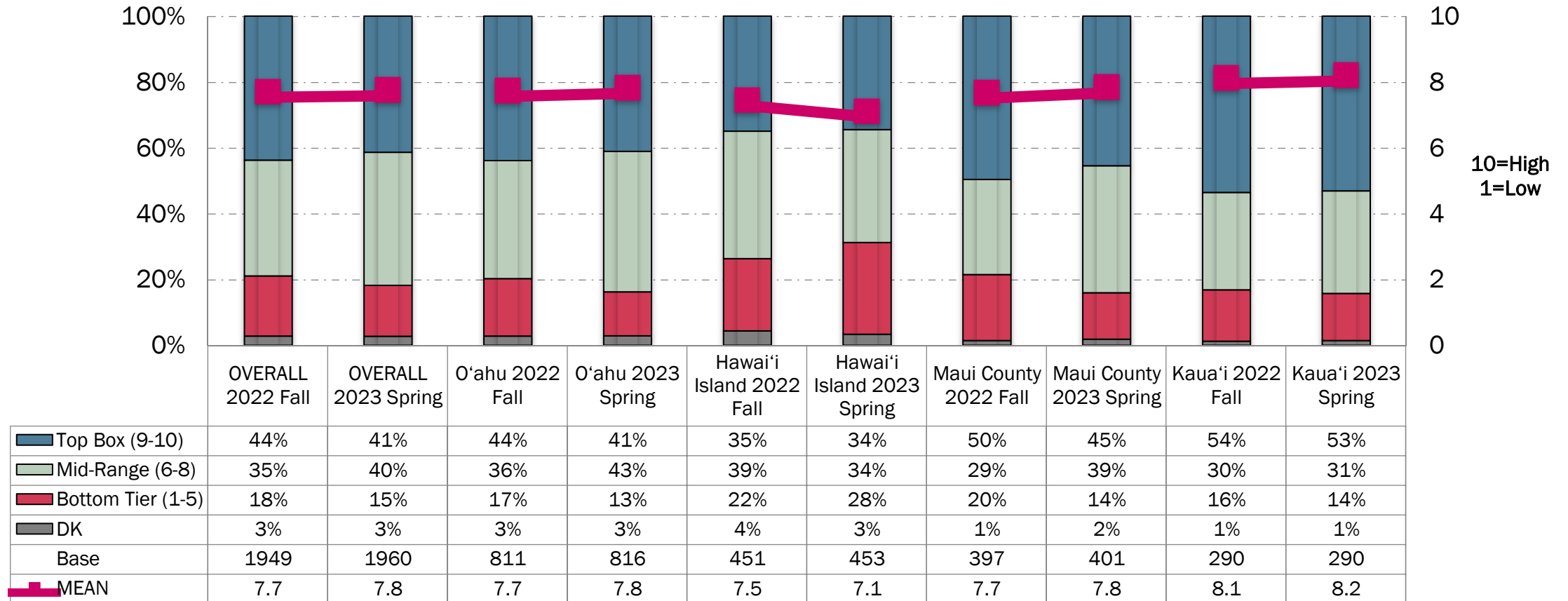
Q4.2. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



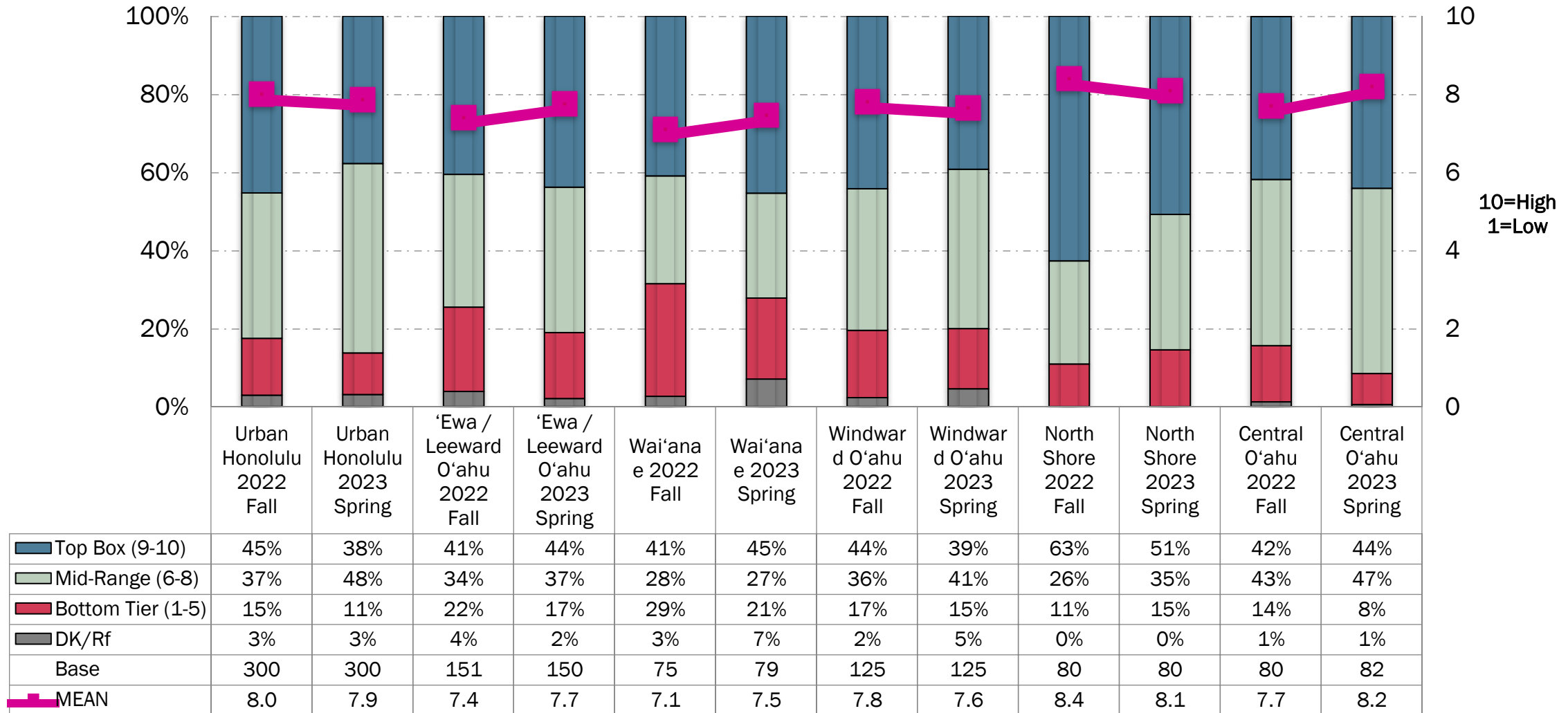
Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



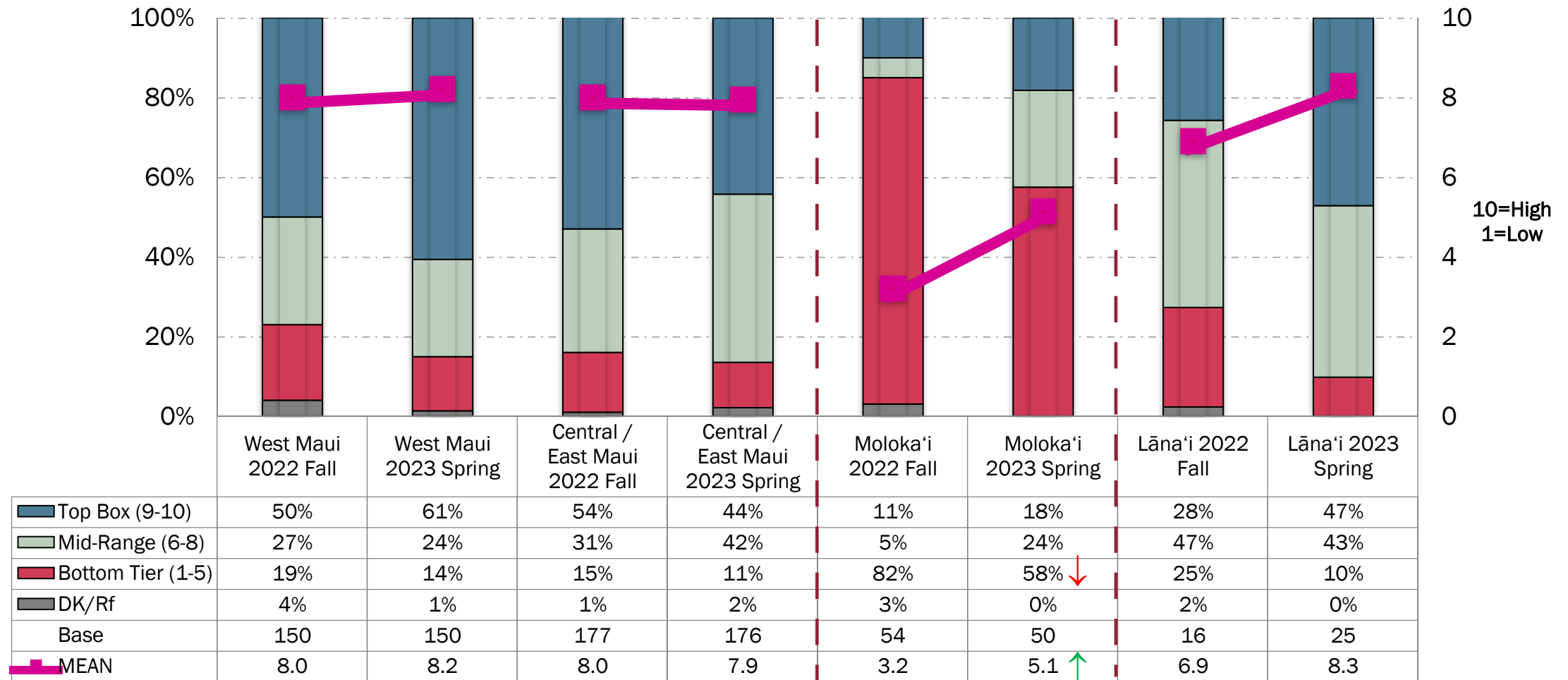
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“My island’s economy is too dependent on tourism” – By Area (O‘ahu)



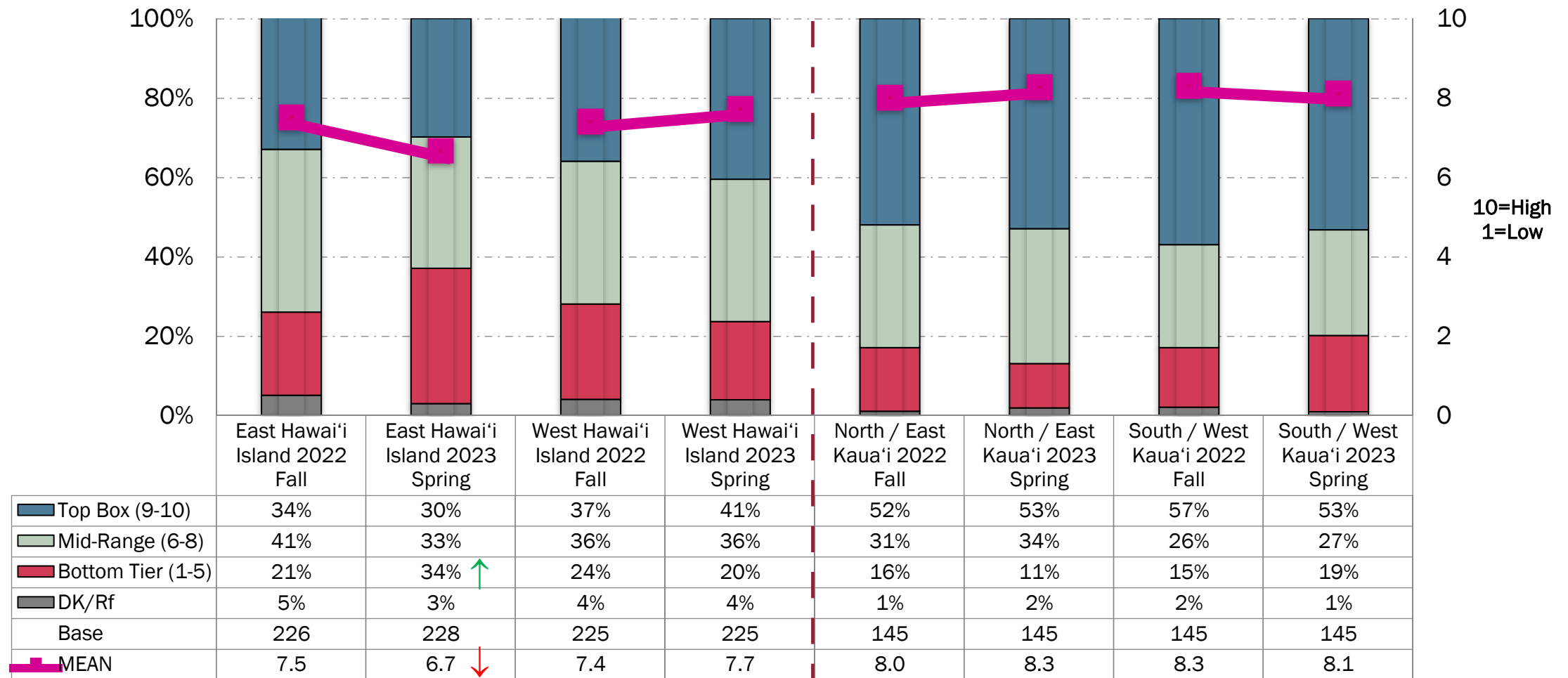
Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My island’s economy is too dependent on tourism” – *By Area (Maui County)*



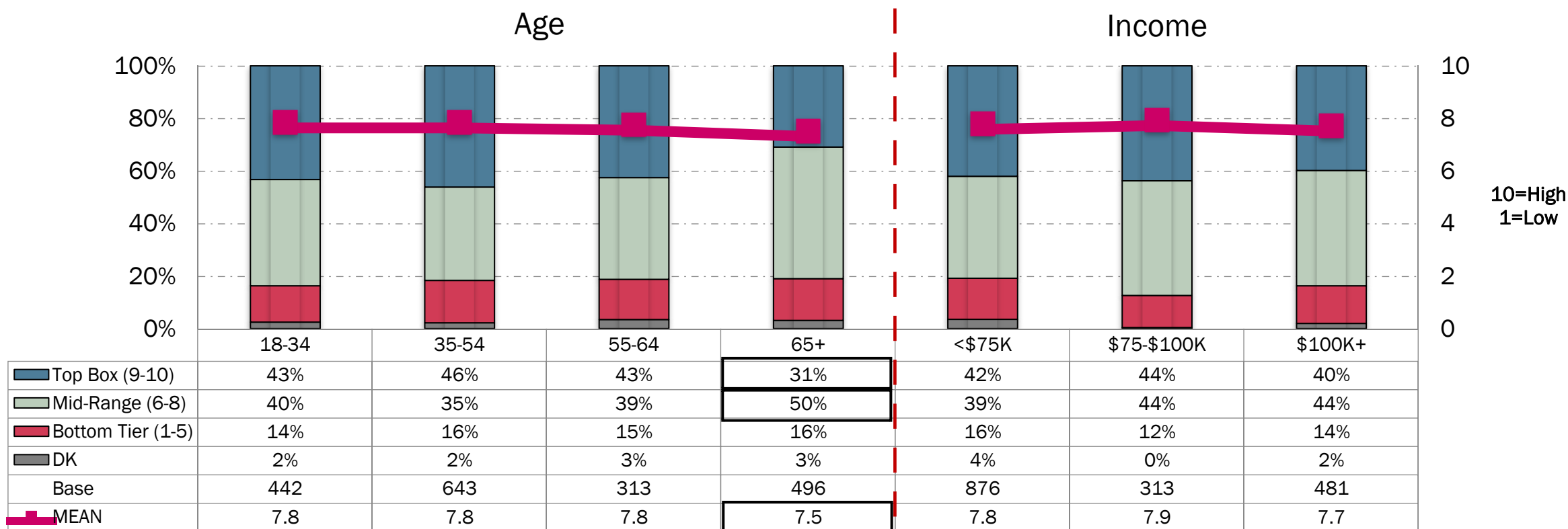
Q4.5. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



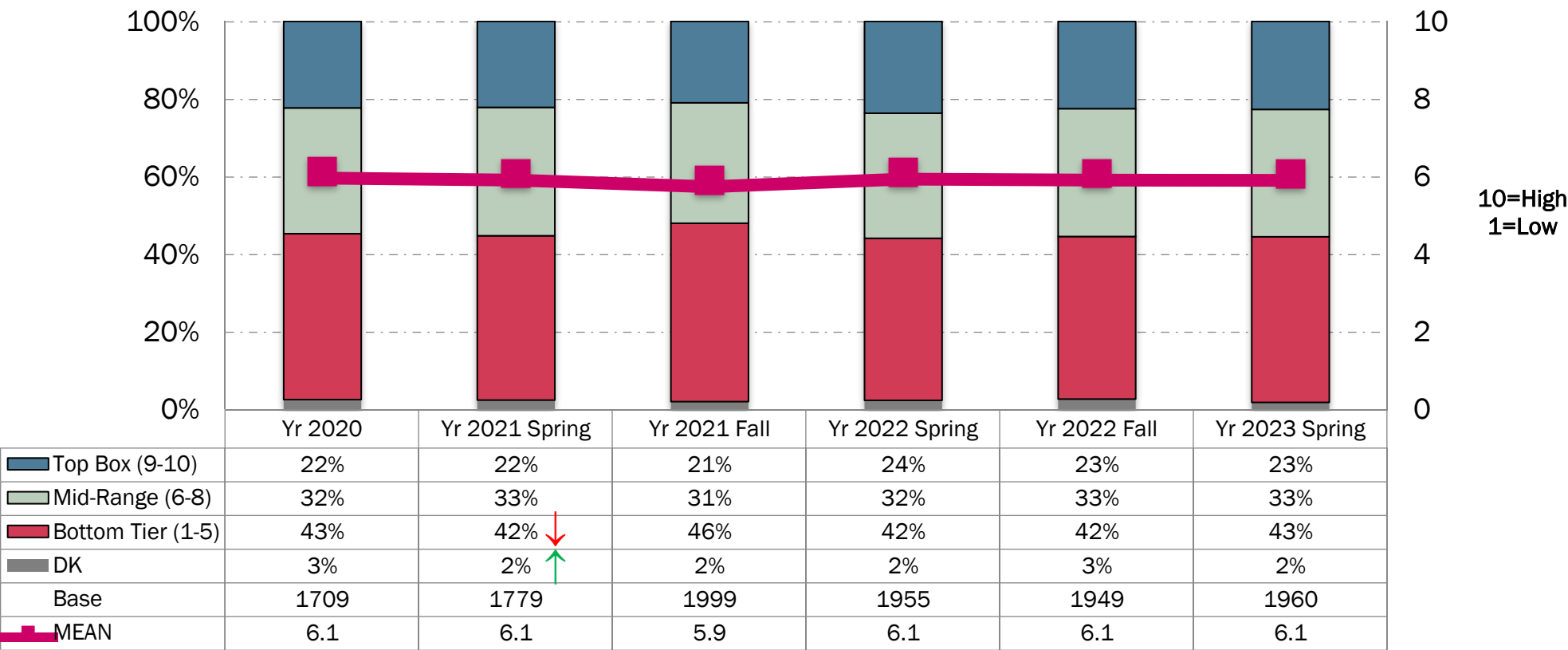
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“My island’s economy is too dependent on tourism” – By Demographics



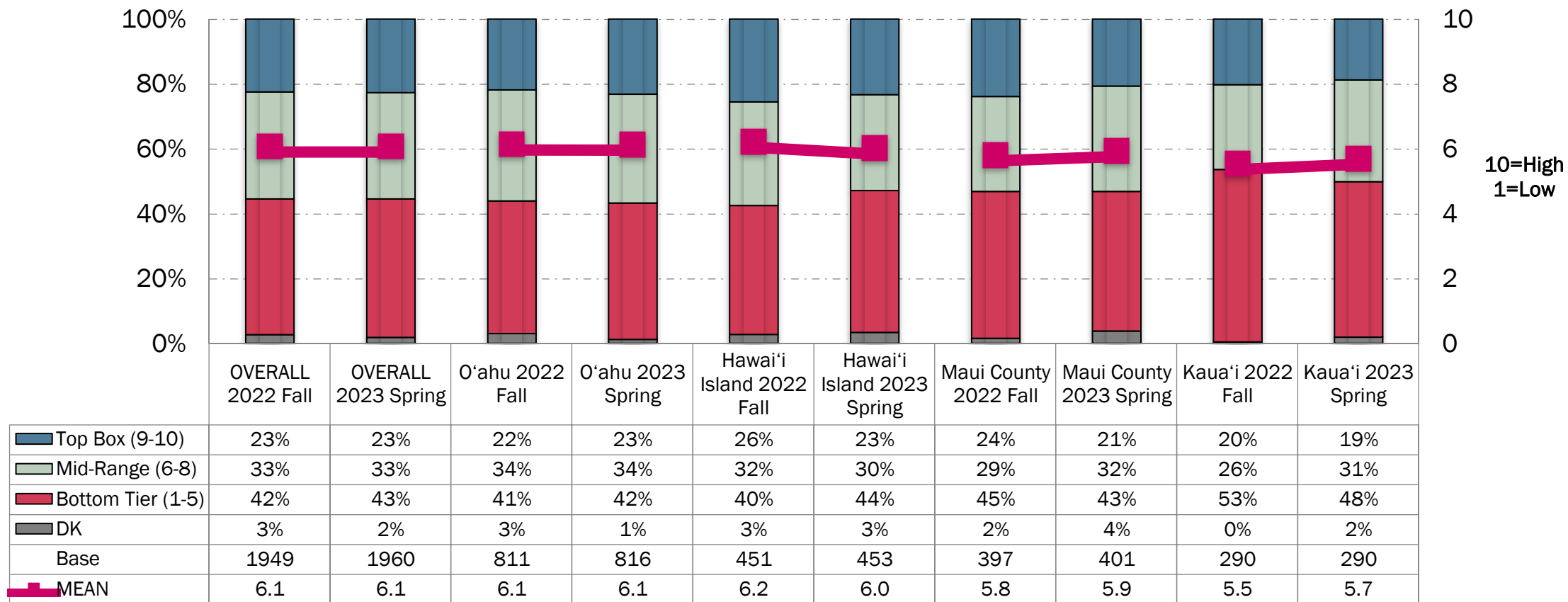
Q4.5. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism should be actively encouraged on my island - Overall



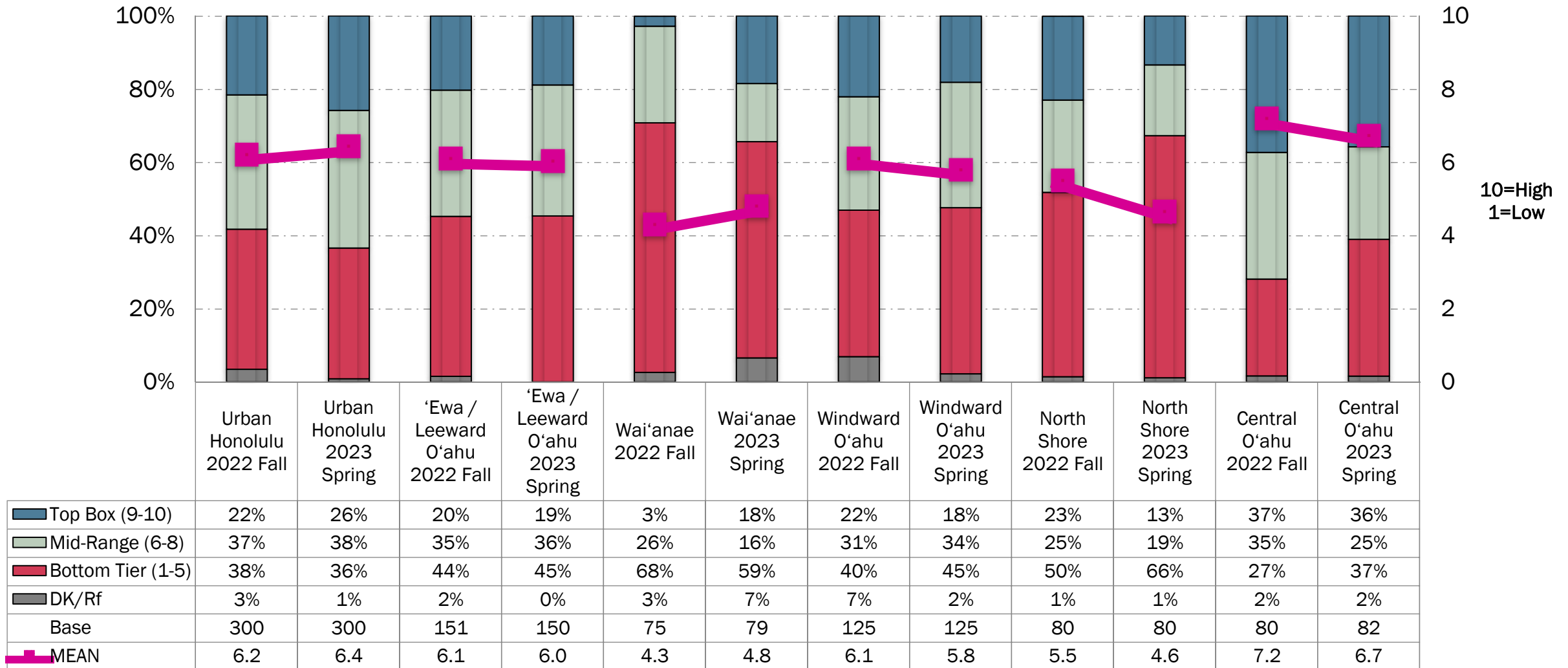
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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)*



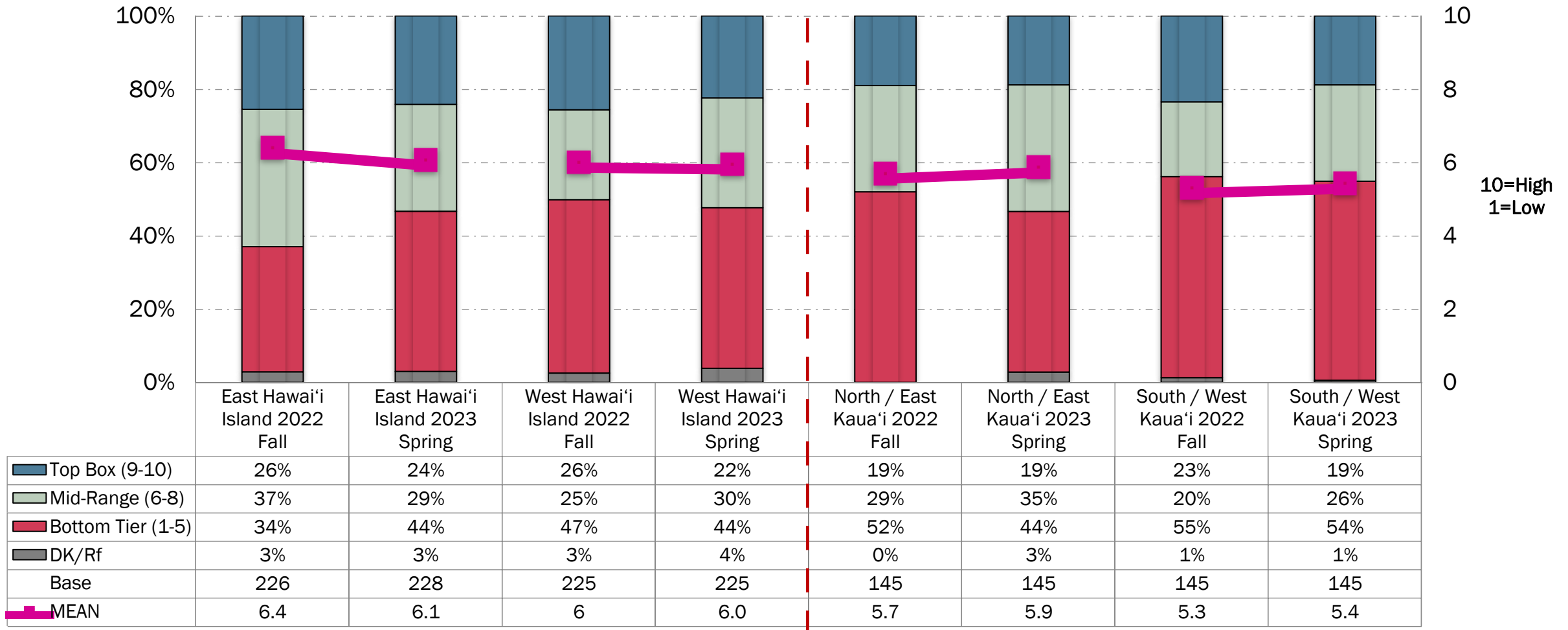
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism should be actively encouraged on my island” – *By Area (Maui County)*



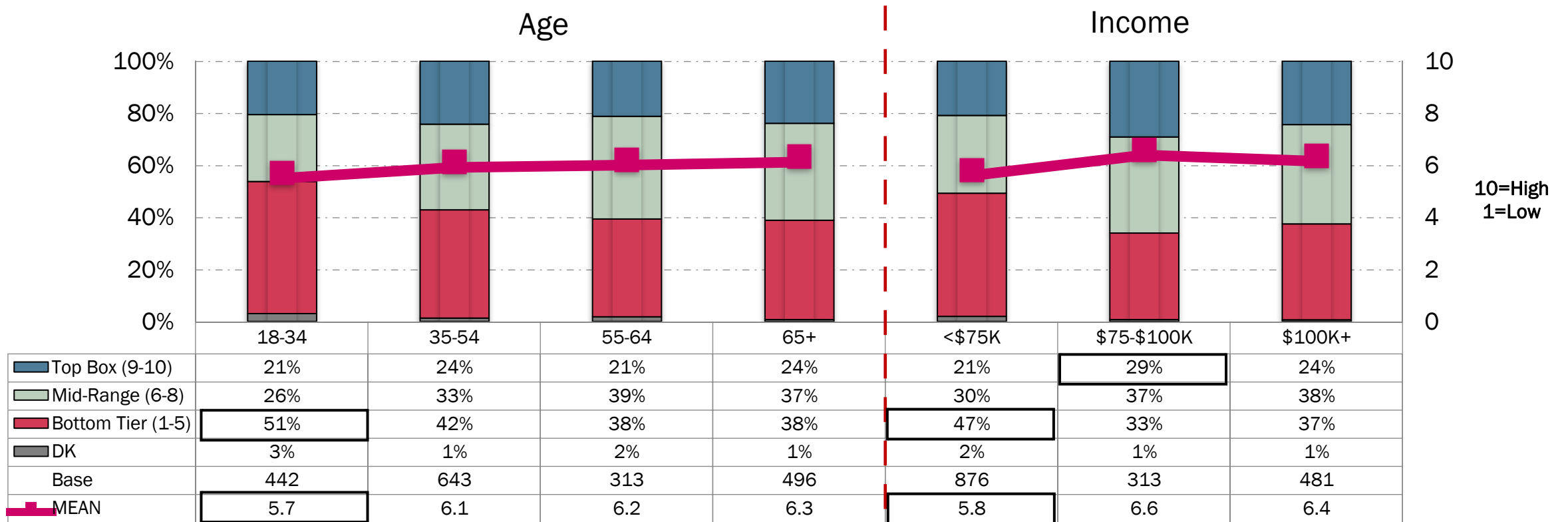
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



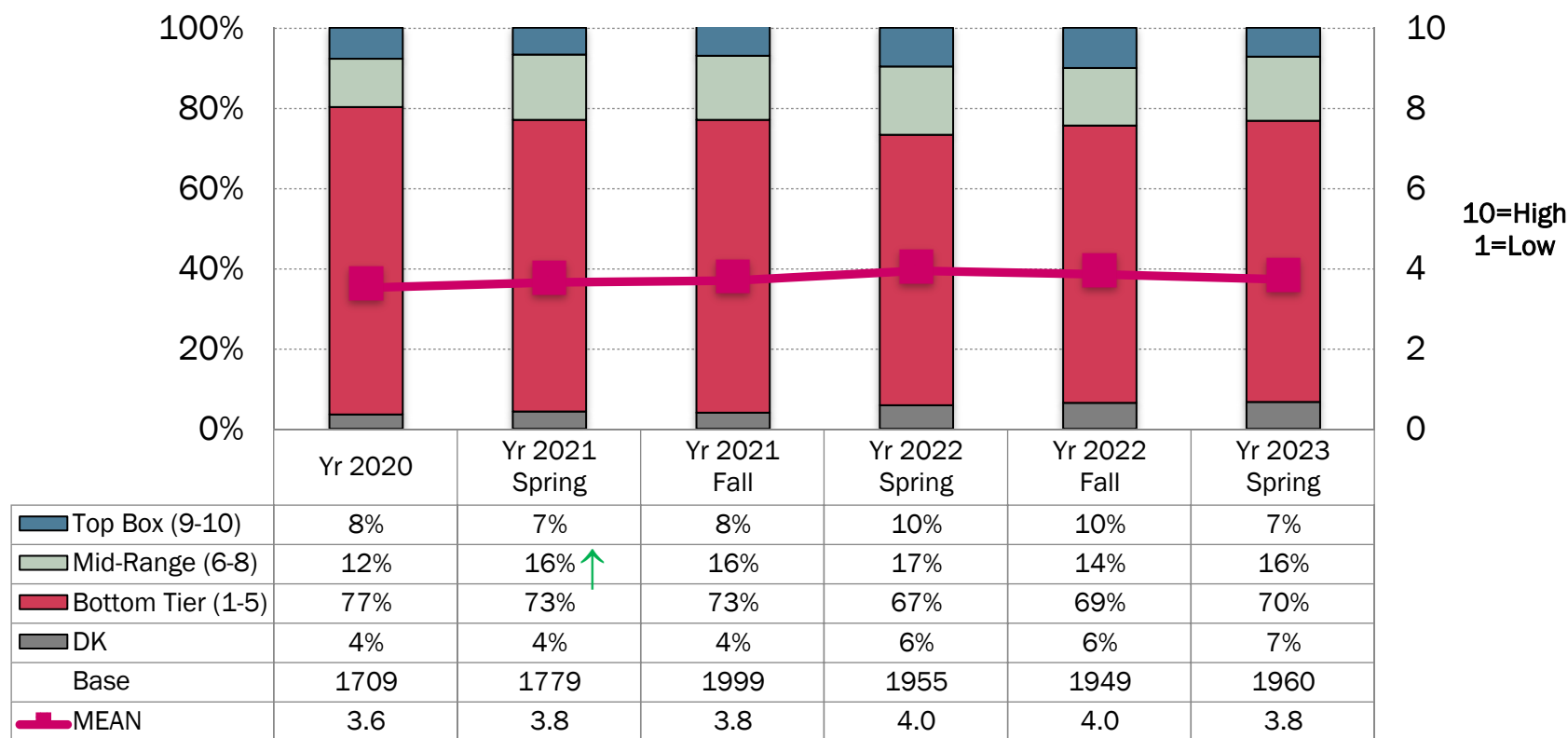
Q4.8. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



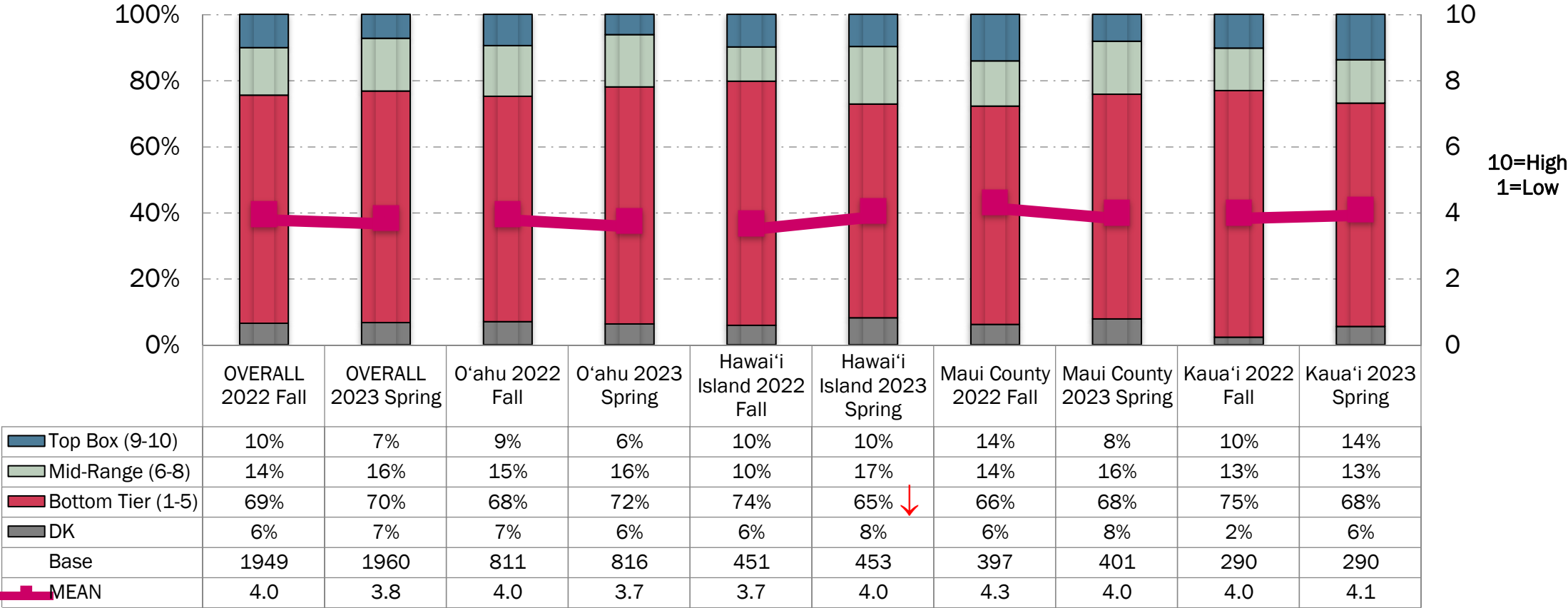
Q4.8. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“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 County*



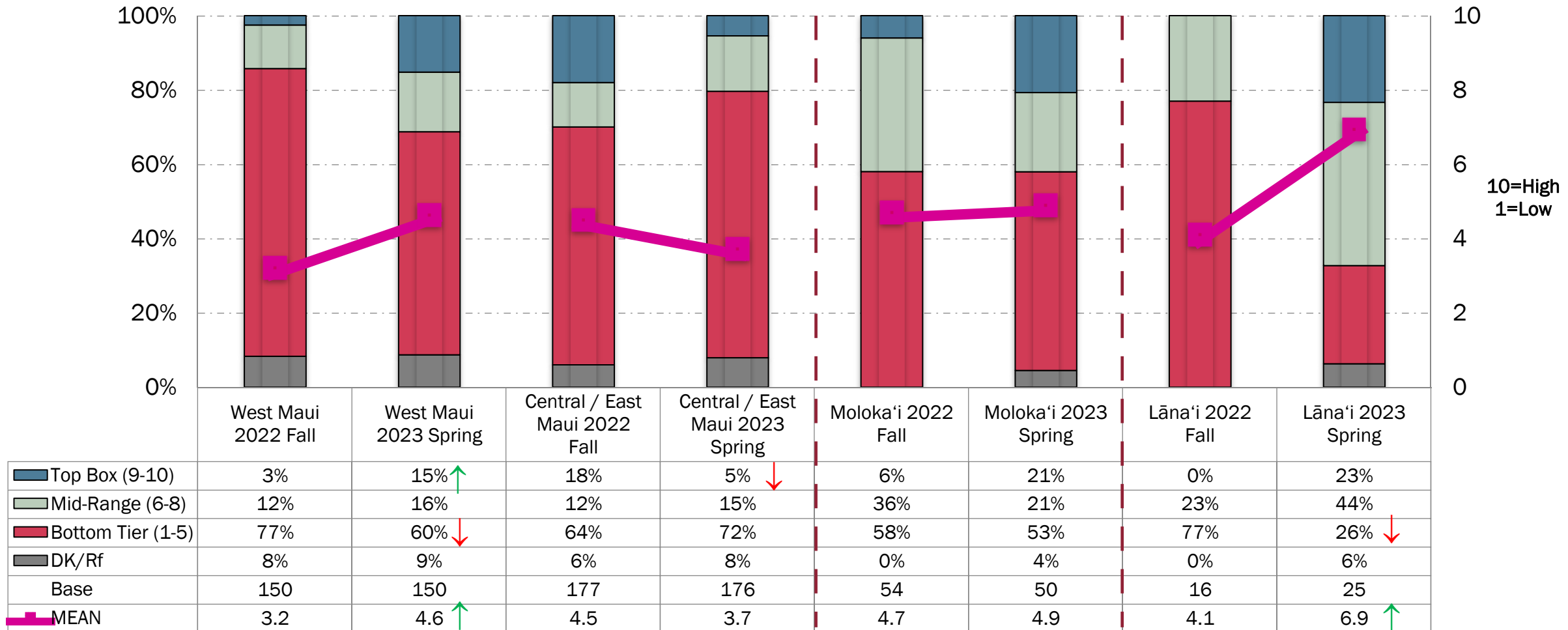
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“I feel like I have a voice in my island’s tourism development decisions” – *By Area (O’ahu)*



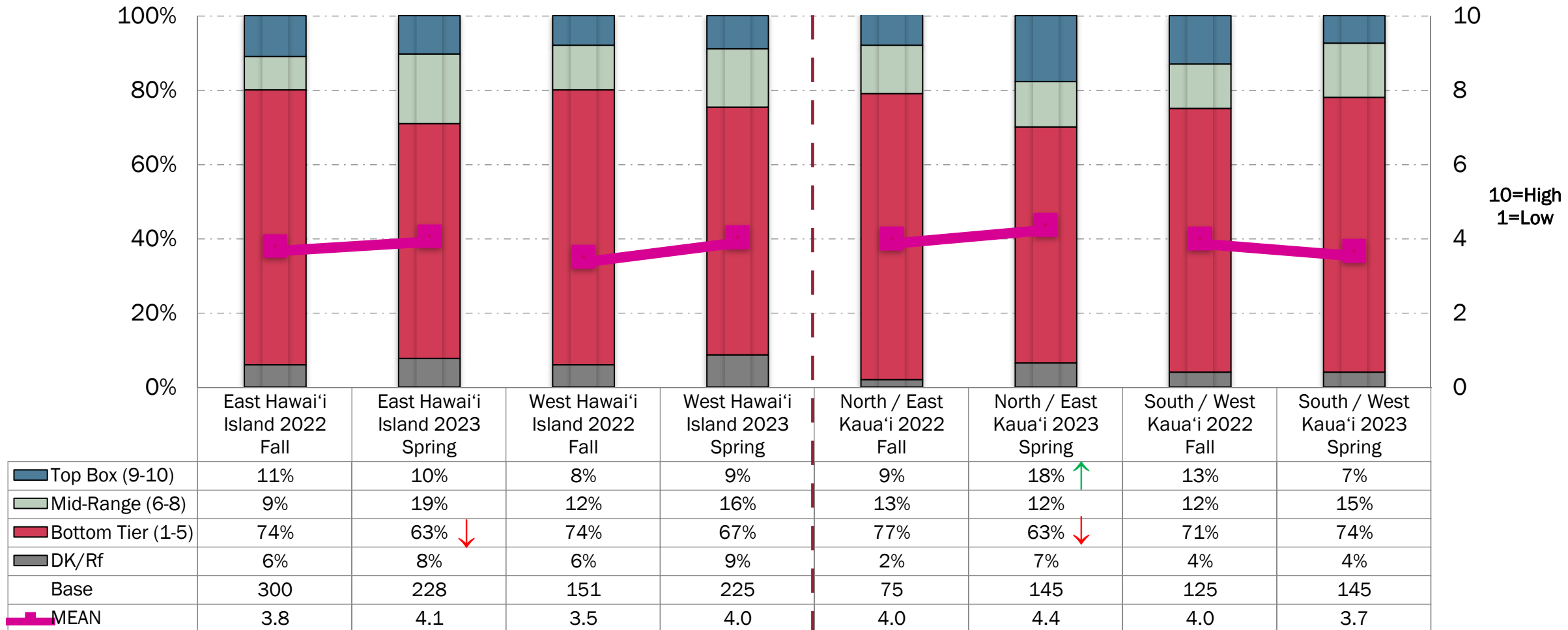
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



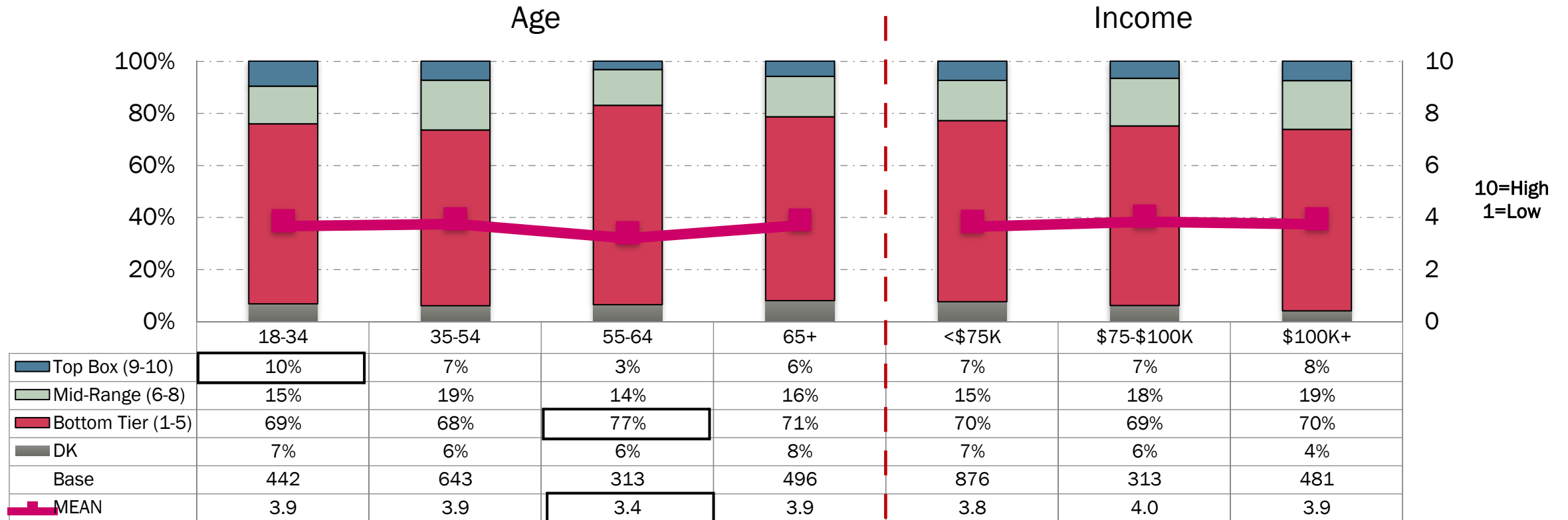
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



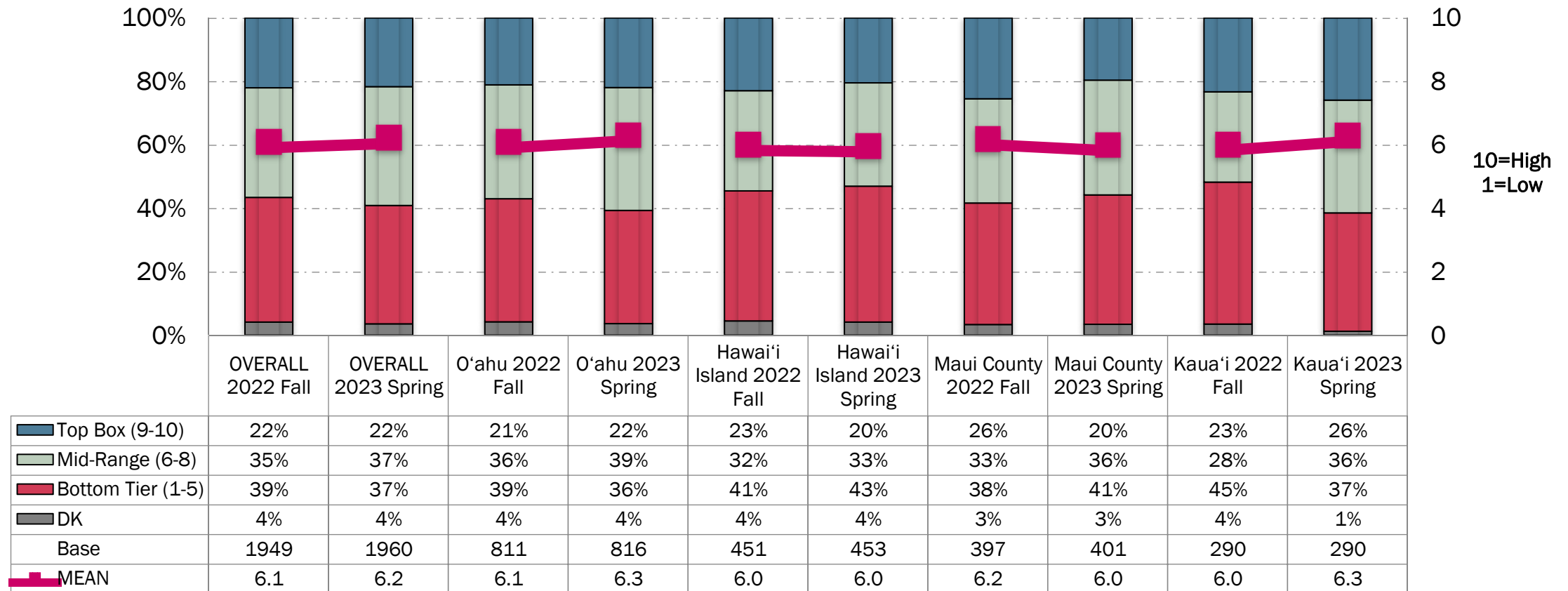
Q4.11. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” – *By 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 supports other industries important to residents like agriculture” – *By County*



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 Area (O‘ahu)*



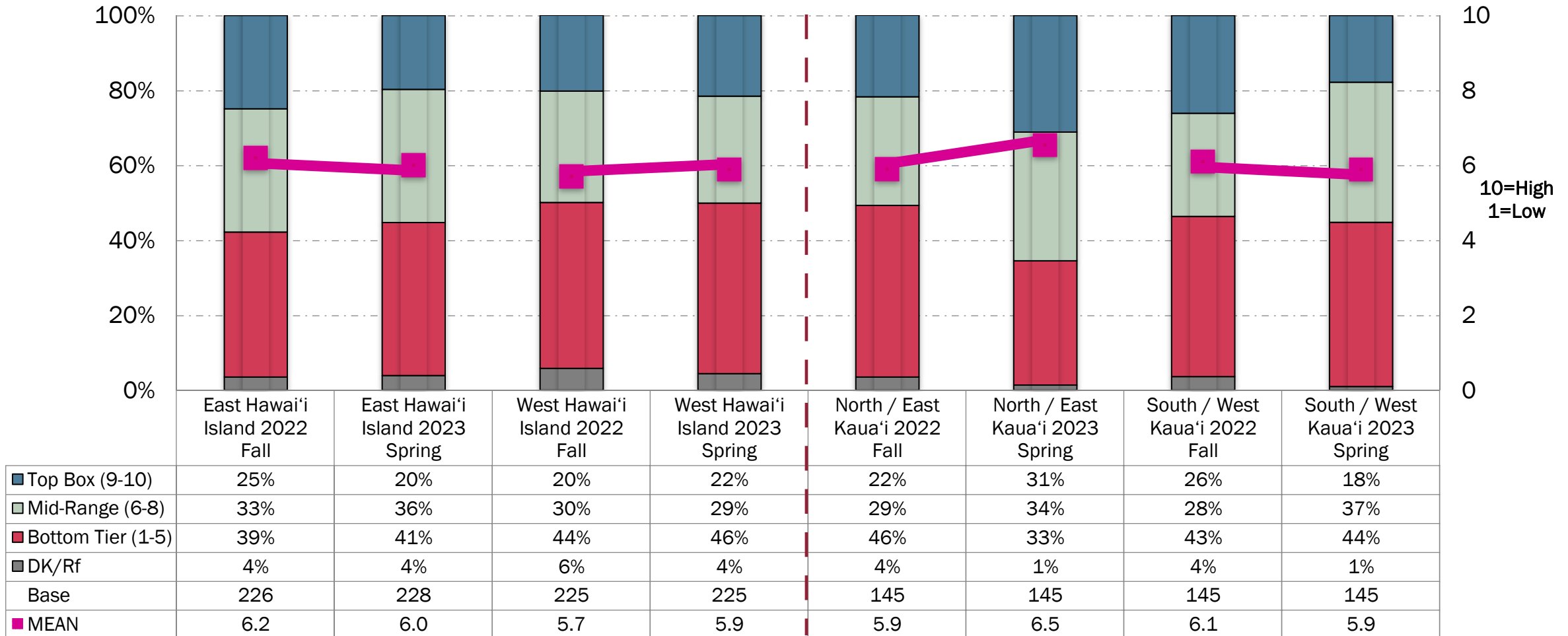
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“Tourism supports other industries important to residents like agriculture” - *By Area (Maui County)*

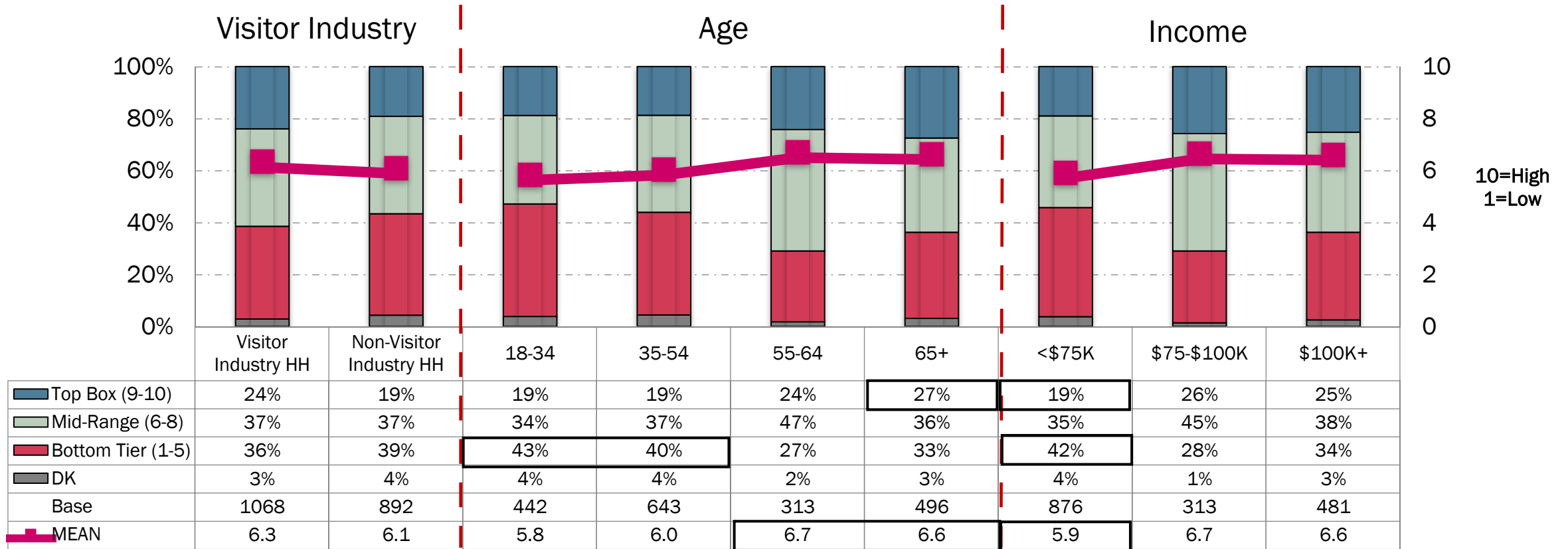


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“Tourism supports other industries important to residents like agriculture” - *By Area (Hawai‘i Island & Kaua‘i)*



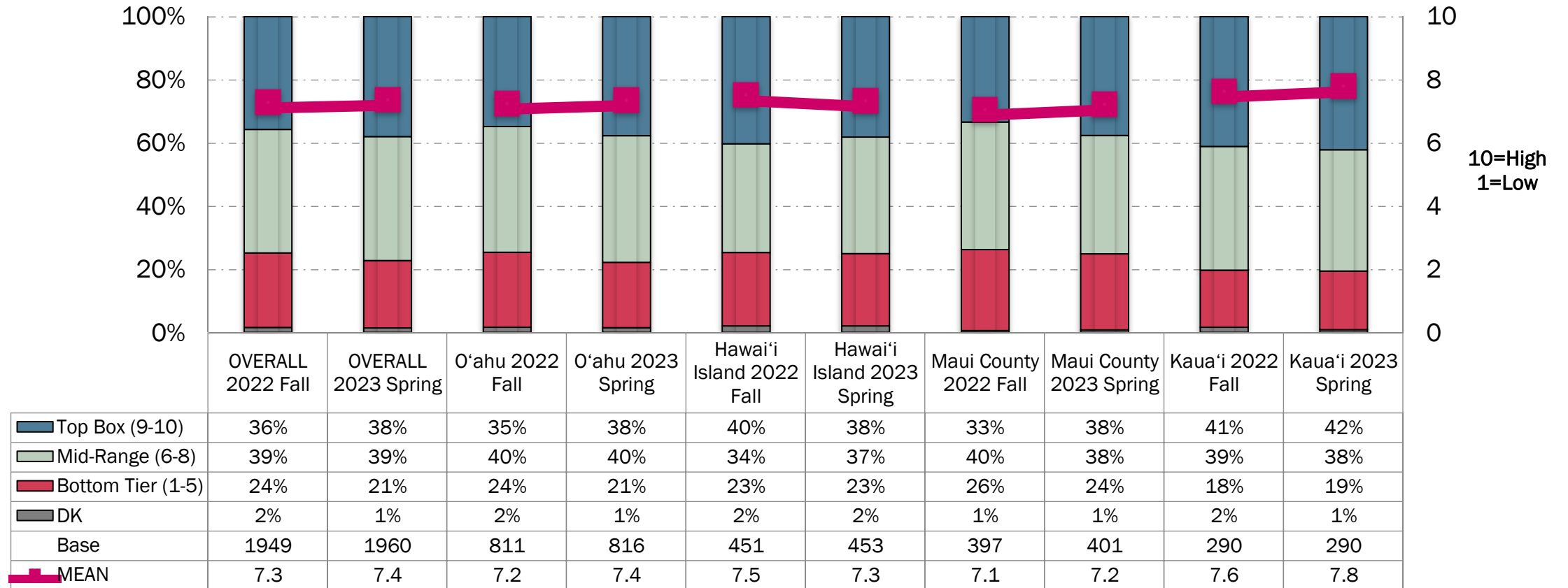
“Tourism supports other industries important to residents like agriculture” - *By Demographics*



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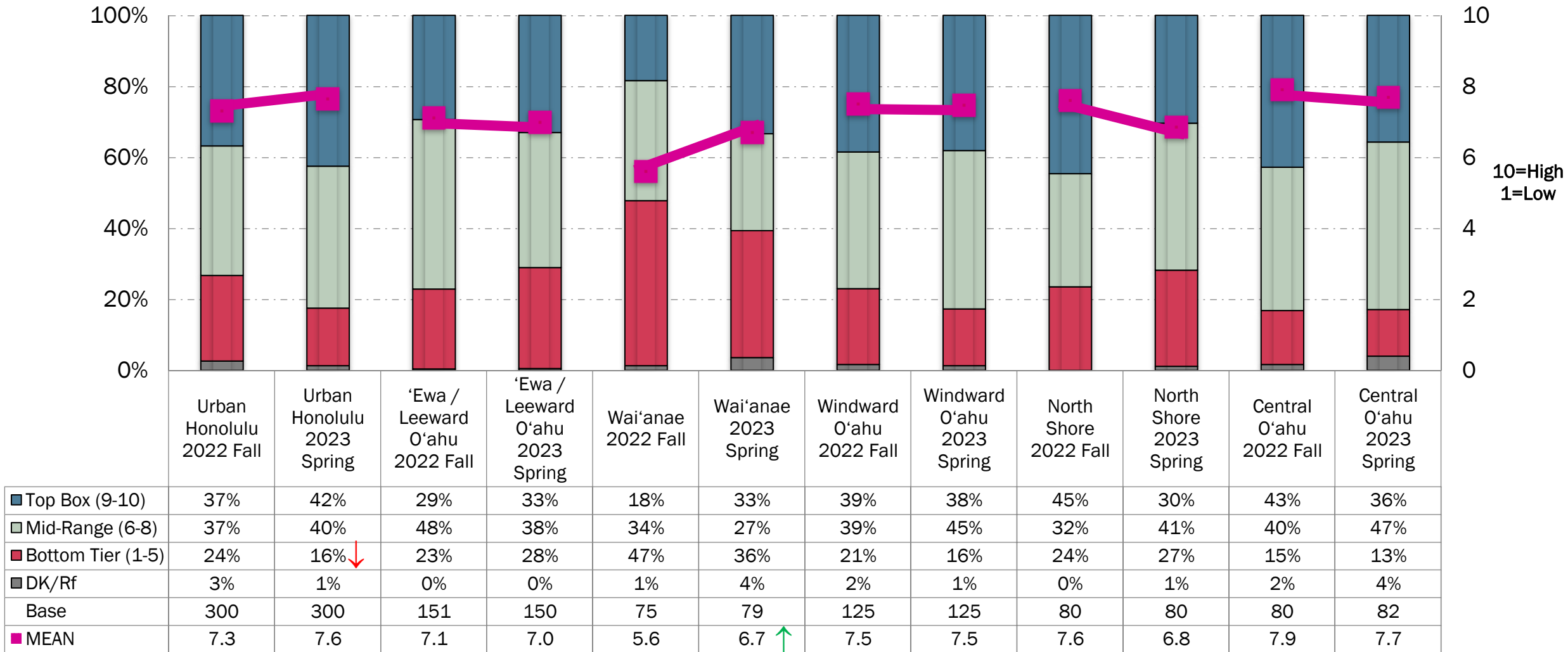
*Note: Changed in Spring 2022 fielding from “Tourism supports other industries like agriculture.”

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



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 our local businesses like retail, dining, etc.” – *By Area (O‘ahu)*



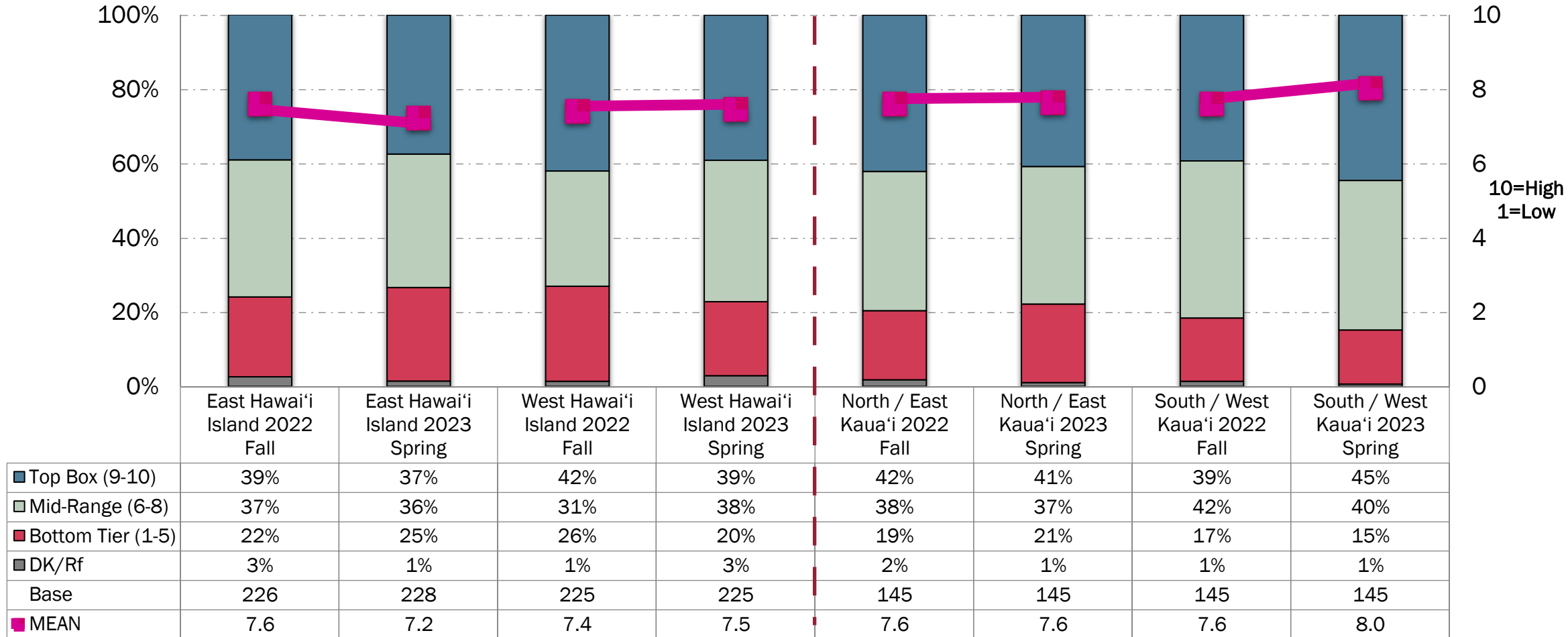
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“Tourism supports our local businesses like retail, dining, etc.” – By Area (Maui County)



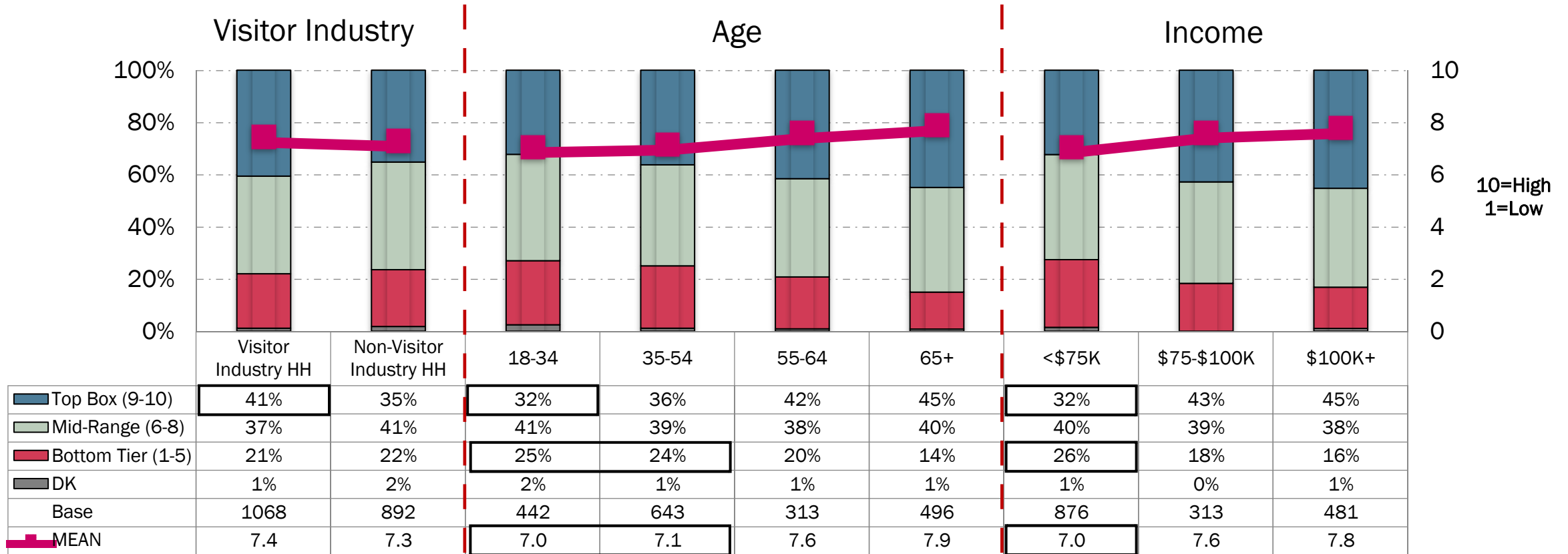
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“Tourism supports our local businesses like retail, dining, etc.”- By Area (Hawai‘i Island & Kaua‘i)



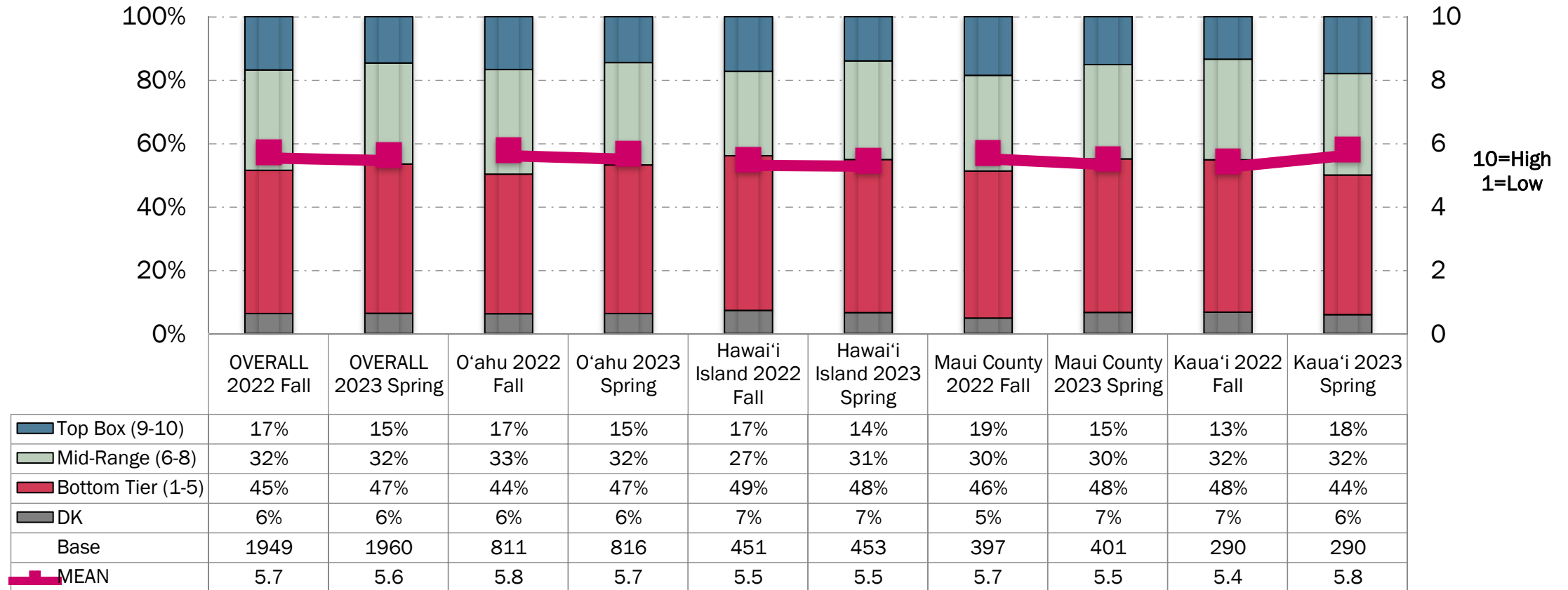
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“Tourism supports our local businesses like retail, dining, etc.” – *By Demographics*



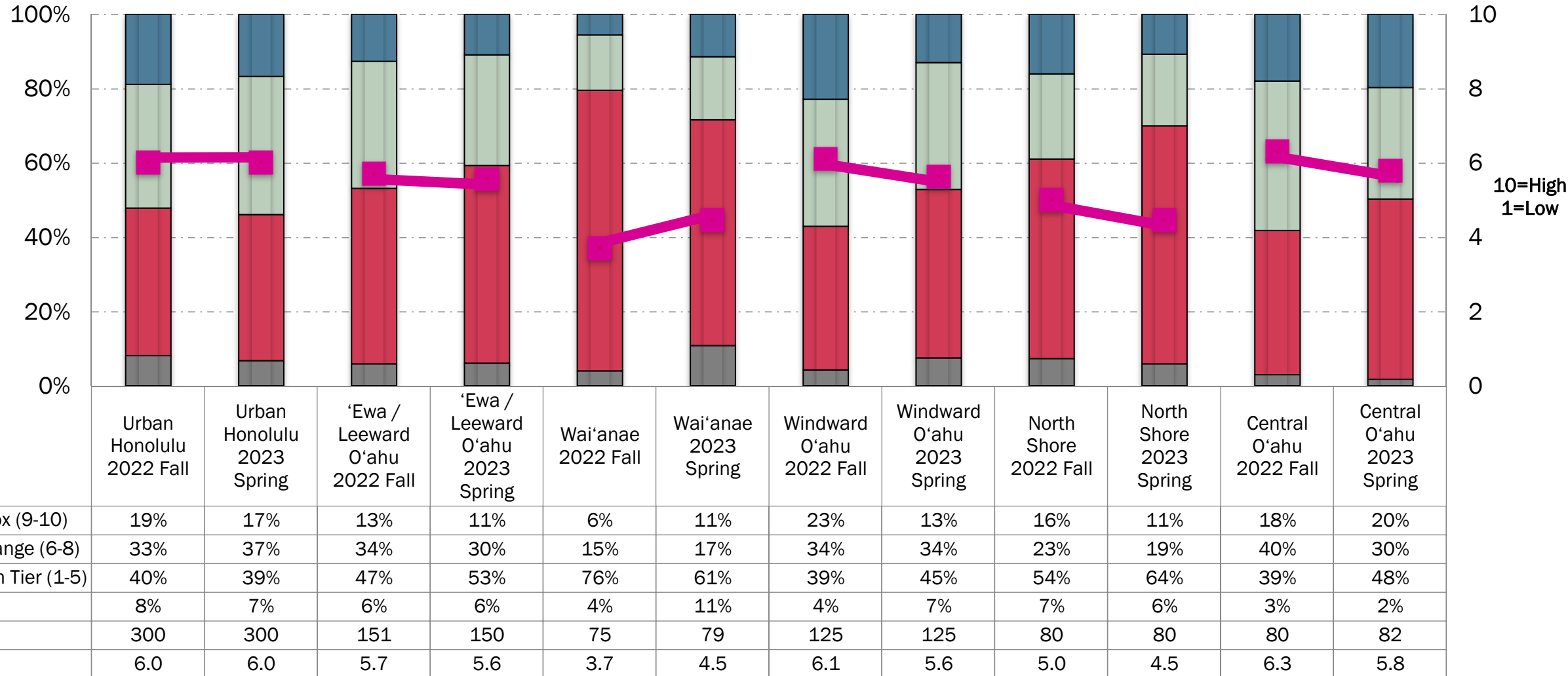
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



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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)*



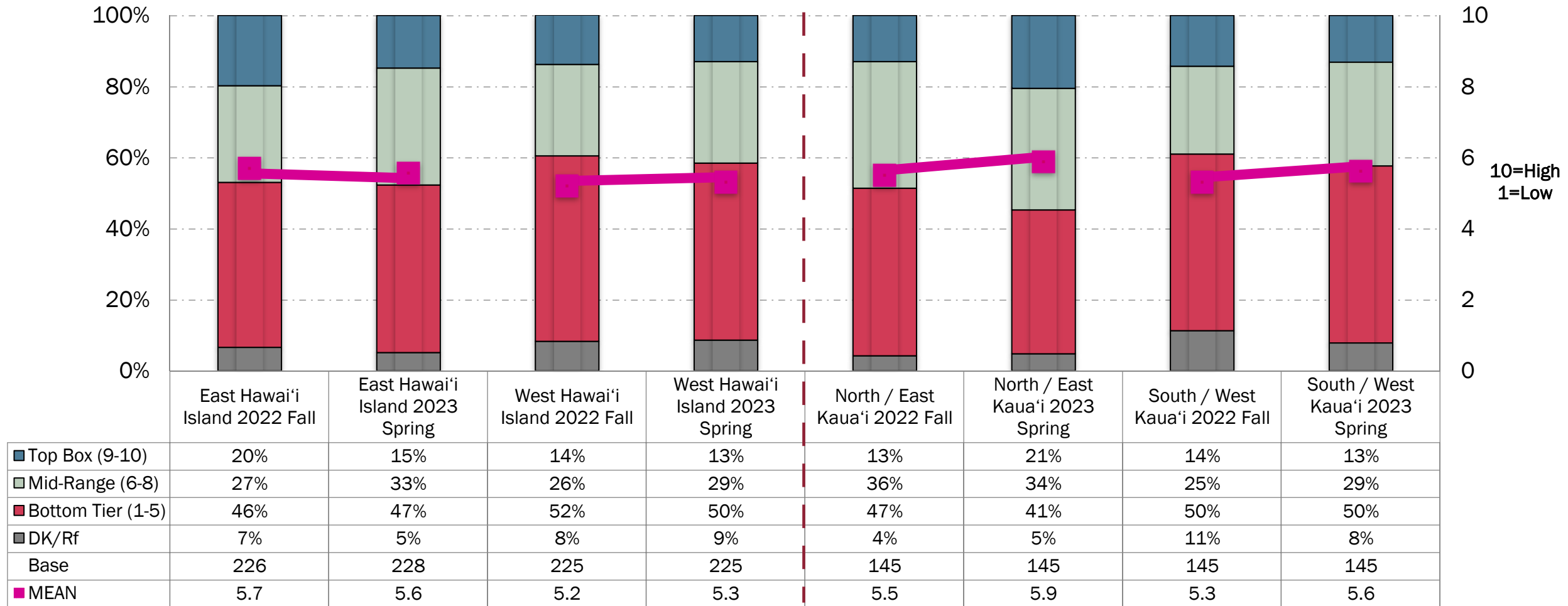
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - *By Area (Maui County)*



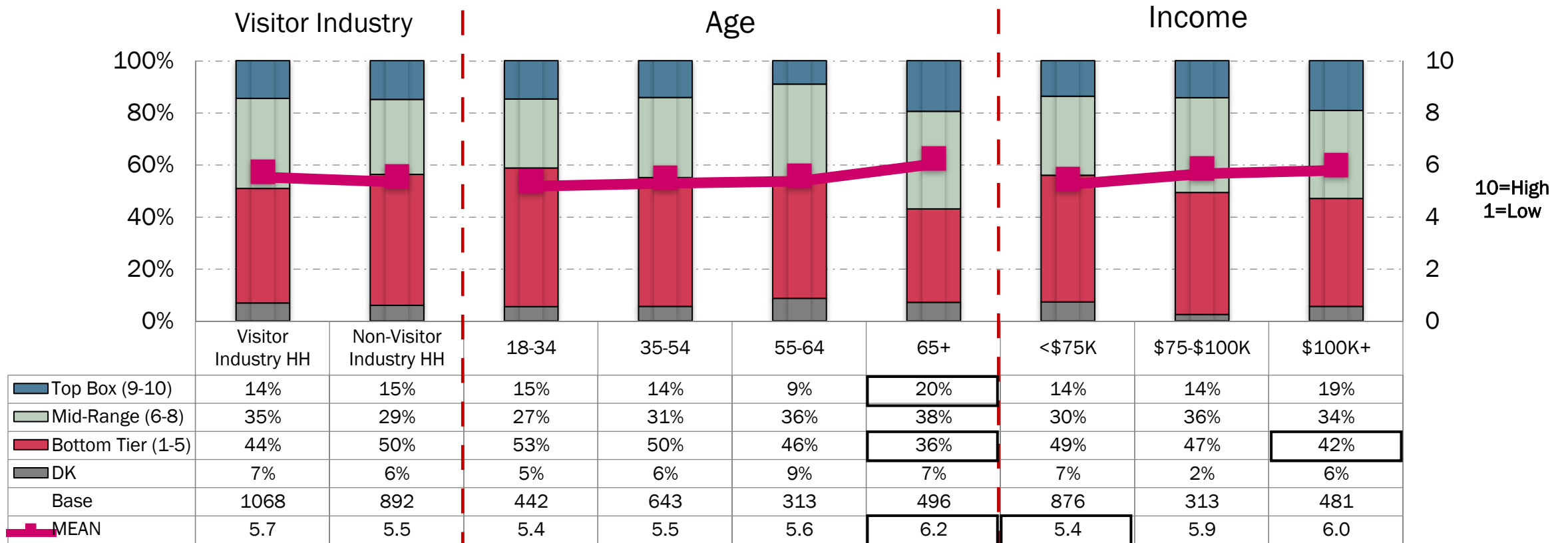
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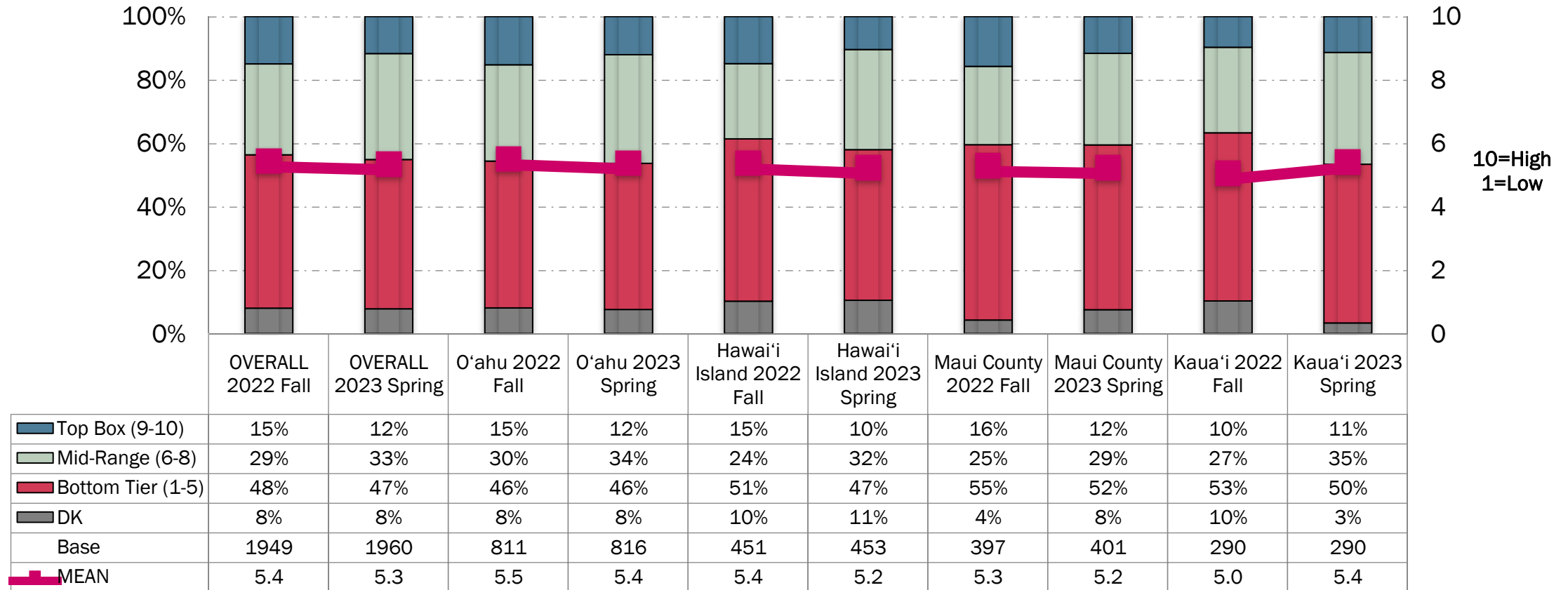
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By Demographics*



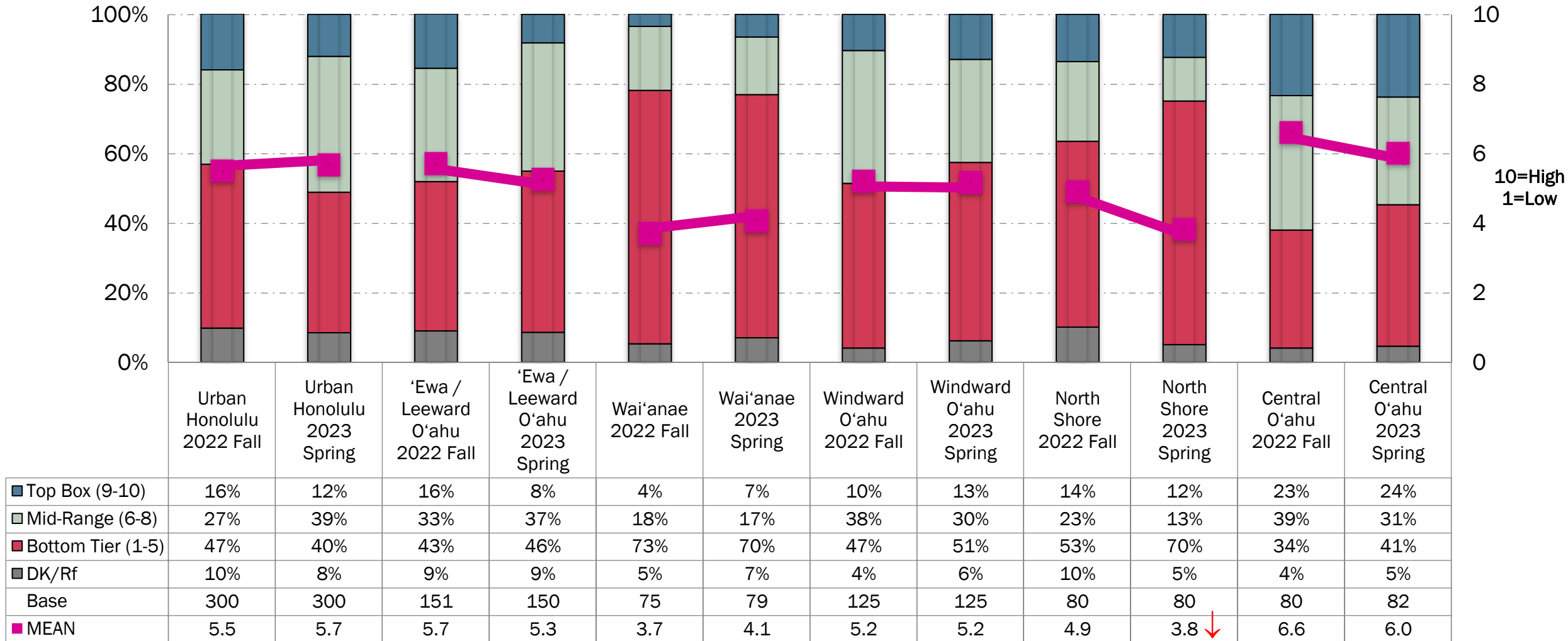
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



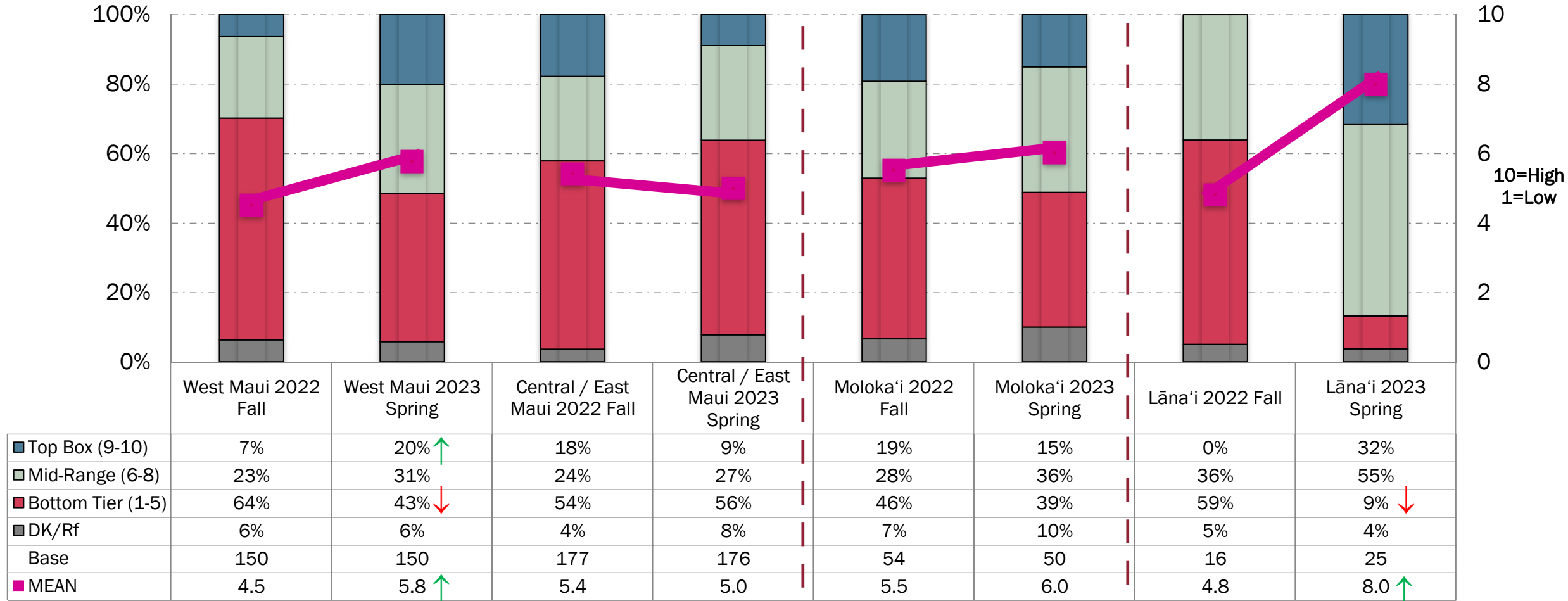
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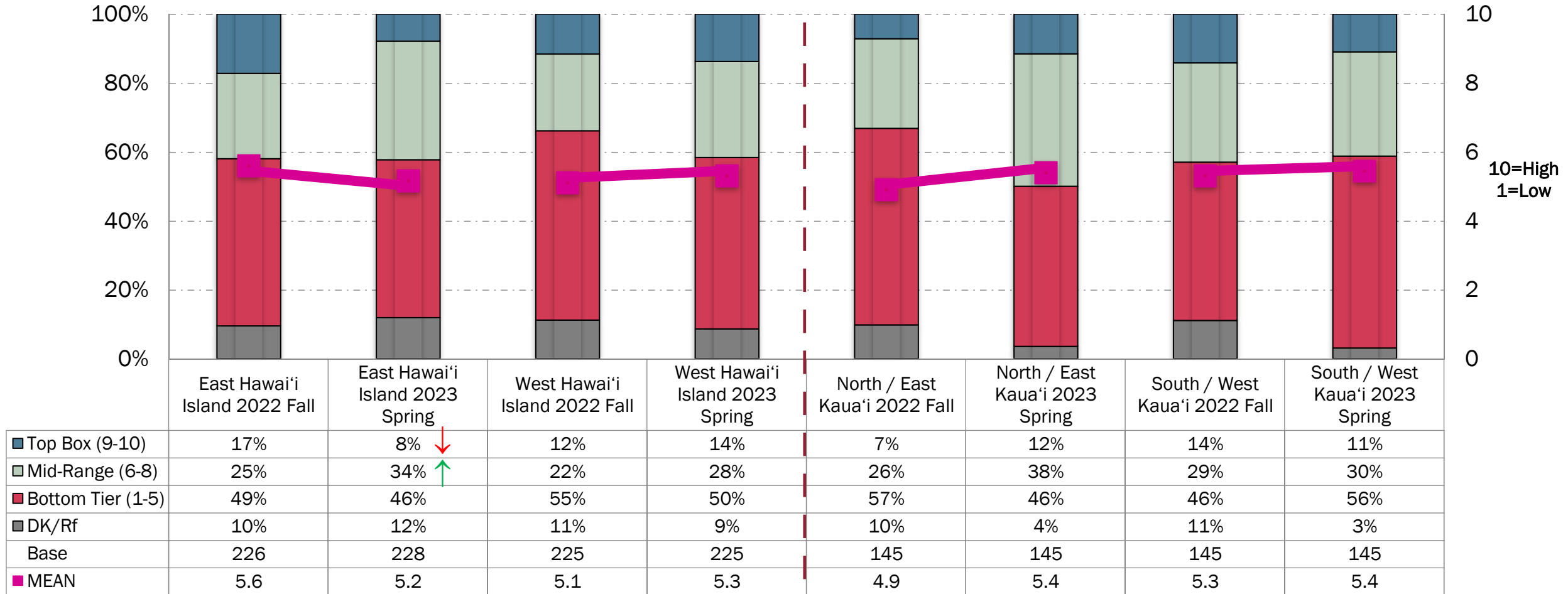
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“I feel like tourism is being better managed on my island” – By Area (Maui County)



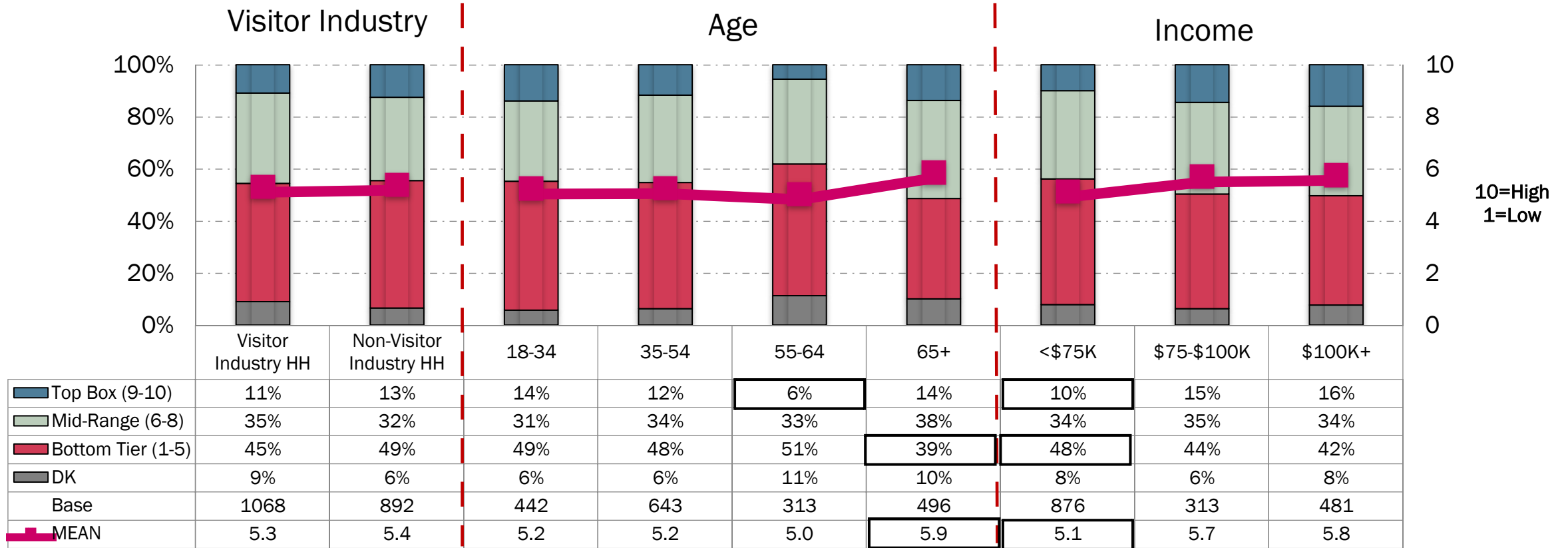
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“I feel like tourism is being better managed on my island” – *By Area (Hawai‘i Island & Kaua‘i)*



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



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.



Appendix A: Island Supplement

Key Recommendations & Takeaways – O‘ahu

- 1 **Reflecting Statewide trends, perception of tourism flattens:** Overall sentiment among O‘ahu residents stabilized with scores remaining stable between Fall 2022 and Spring 2023.

Key Resident Sentiment Tracking Statements (O‘ahu)

Mean Score	Fall 2021	Spring 2022	Fall 2022	Spring
<i>Tourism has brought more benefits than problems</i>	5.79	6.05	6.11	5.97
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	--	--	6.85	6.55
<i>Perceived impact of tourism on you and your family</i>	6.02	6.04	6.16	6.01
<i>Tourism is being better managed on my island</i>	5.14	5.33	5.50	5.37
<i>My island is run for tourists at expense of local people</i>	7.01	6.80	6.93	6.90

One bright area remains that O‘ahu residents appreciate tourism’s sponsorship of festivals and activities compared to other areas.

Mean Score	O‘ahu	Hawai‘i Island	Maui County	Kaua‘i
<i>Tourism sponsors festivals/activities for residents and visitors</i>	6.6	6.1	5.7	5.9

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

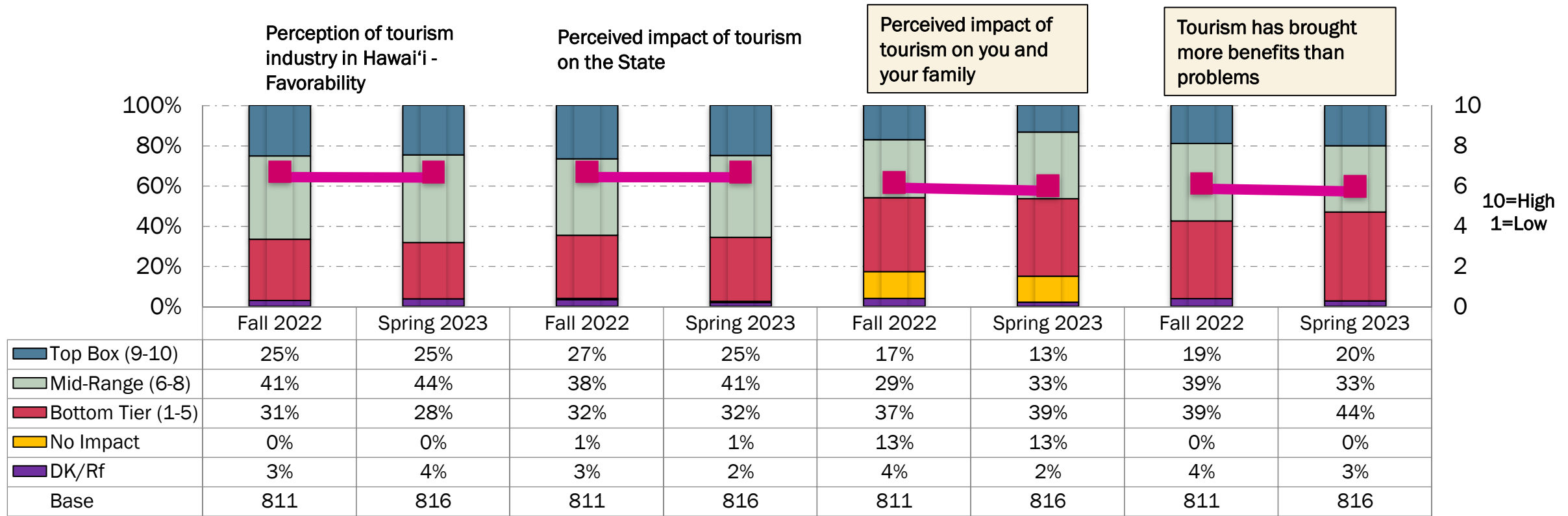
- 2 **Resident Sentiment remains lower on the North Shore and the Wai‘anae coast:** Sentiment towards the industry is not distributed evenly throughout the island with these two areas reporting the least favorable perceptions.

- 3 **Support for Managed Tourism Strategies remains robust, particularly among Honolulu and North Shore communities:** Although O‘ahu residents generally supported these initiatives, strategies resonate differently across communities. Specifically, strategies to limit vacation units and charging fees to reduce visitor access is especially popular among those in Honolulu and the North Shore.

Mean Score	Honolulu	‘Ewa Leeward	Wai‘anae	Windward	North Shore	Central
<i>No additional hotel/condo units</i>	7.1	7.0	7.4	7.3	7.8	7.6
<i>Eliminate illegal rentals</i>	8.0	7.6	6.8	7.2	7.2	8.5
<i>Stop approval of vacation rentals</i>	7.2	6.4	6.6	6.5	7.1	6.9
<i>Charge visitor fees</i>	7.2	6.3	6.2	6.8	7.3	6.9

- 4 Public awareness of Destination Management Action Plans rose to 26 percent meaning that around 1-in-4 residents had heard of these plans. Specific initiatives fared much better with around 45 percent aware of work in pre-/post-arrival communication, implementing stewardship plans, and collaborating with community partners to enrich the lives of visitors/residents.

O'ahu – Key High Level Resident Sentiment Indicators

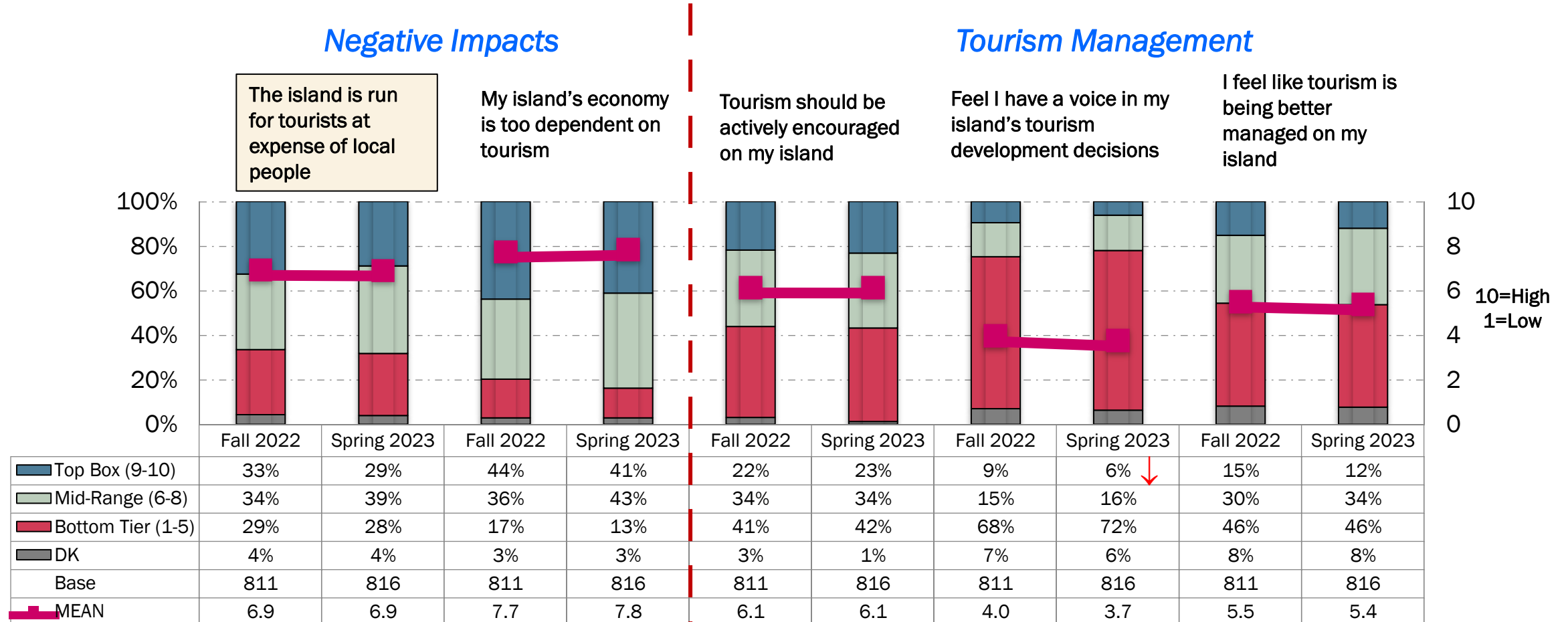


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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 **After peaking in 2022, sentiment among Maui residents has stabilized:** In Spring 2023, perceptions of the tourism industry have flattened compared to the surge observed in the previous year. While many residents still believe that tourism brings benefits, negative perceptions are rising.

Key Resident Sentiment Tracking Statements (Maui County)

Mean Score	Fall 2021	Spring 2022	Fall 2022	Spring 2023
Tourism has brought more benefits than problems	5.21	5.34	6.11 ↑	5.92
Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.	--	--	6.67	6.26
Perceived impact of tourism on you and your family	5.97	5.72	6.40 ↑	6.50
My island is run for tourists at expense of local people	7.18	8.01 ↑	7.11 ↓	7.19
My Island's economy is too dependent on tourism	7.72	8.30 ↑	7.68 ↓	7.84

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

In comparing the tax revenues brought in versus the issues associated with the industry, Maui residents were less optimistic that the industry is worth it.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.6	6.8	6.3	6.6

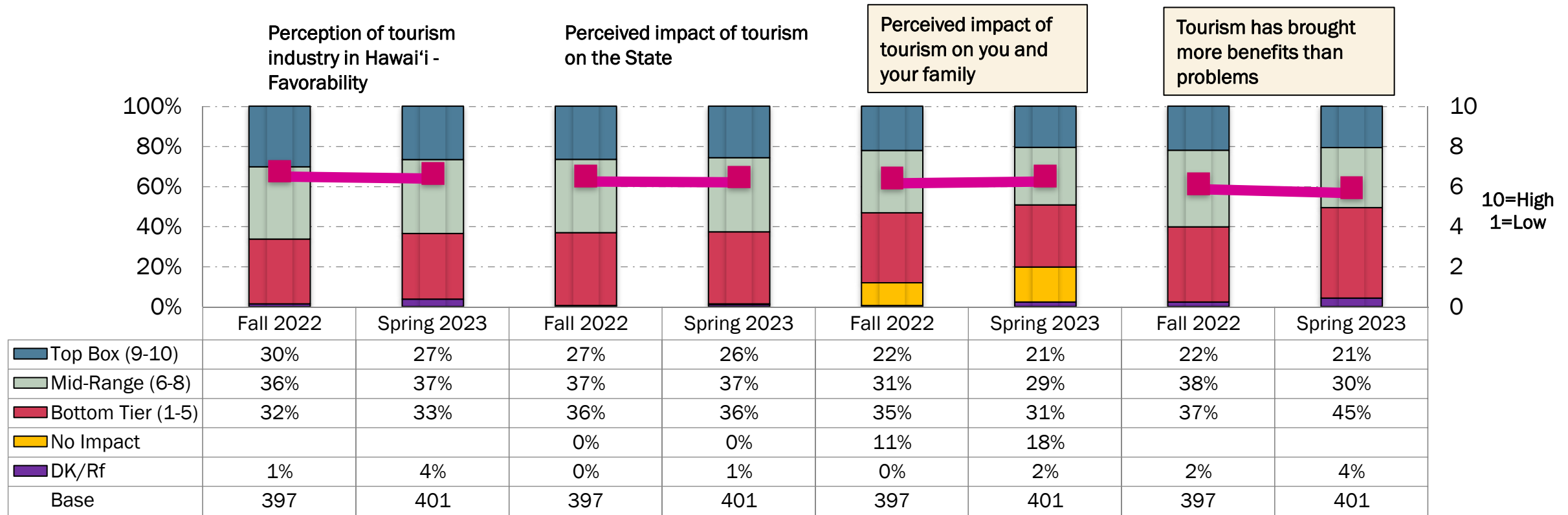
- 2 **Community trends:** Although favorability towards tourism rose strongly in West Maui and Lāna'i, weaker perceptions in Central and Eastern Maui balanced out the overall scores, resulting in a level outcome. Moreover, Moloka'i continues to exhibit lower tourism sentiment compared to other areas.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

- 3 **Residents are receptive to Managed Tourism Strategies:** Maui County is amenable to better tourism management strategies specifically regarding visitor accommodations. Support on Maui County is much higher compared to those on O'ahu or Hawai'i Island.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
Eliminate illegal vacation rentals on my island	7.7	7.3	8.1	8.7
Stop approval of additional legal vacation rentals	6.8	6.2	7.3	7.9
Do not allow additional hotel/condo/timeshare	7.2	6.4	7.5	8.1

- 4 Awareness of Destination Management Action Plans rose to 1-in-3 county residents (36%) while familiarity with the specific initiatives is higher still with between 40-50 percent aware. Residents of Moloka'i are less aware with only 9-19 percent aware of these specific plans.

Maui County – Key High Level Resident Sentiment Indicators

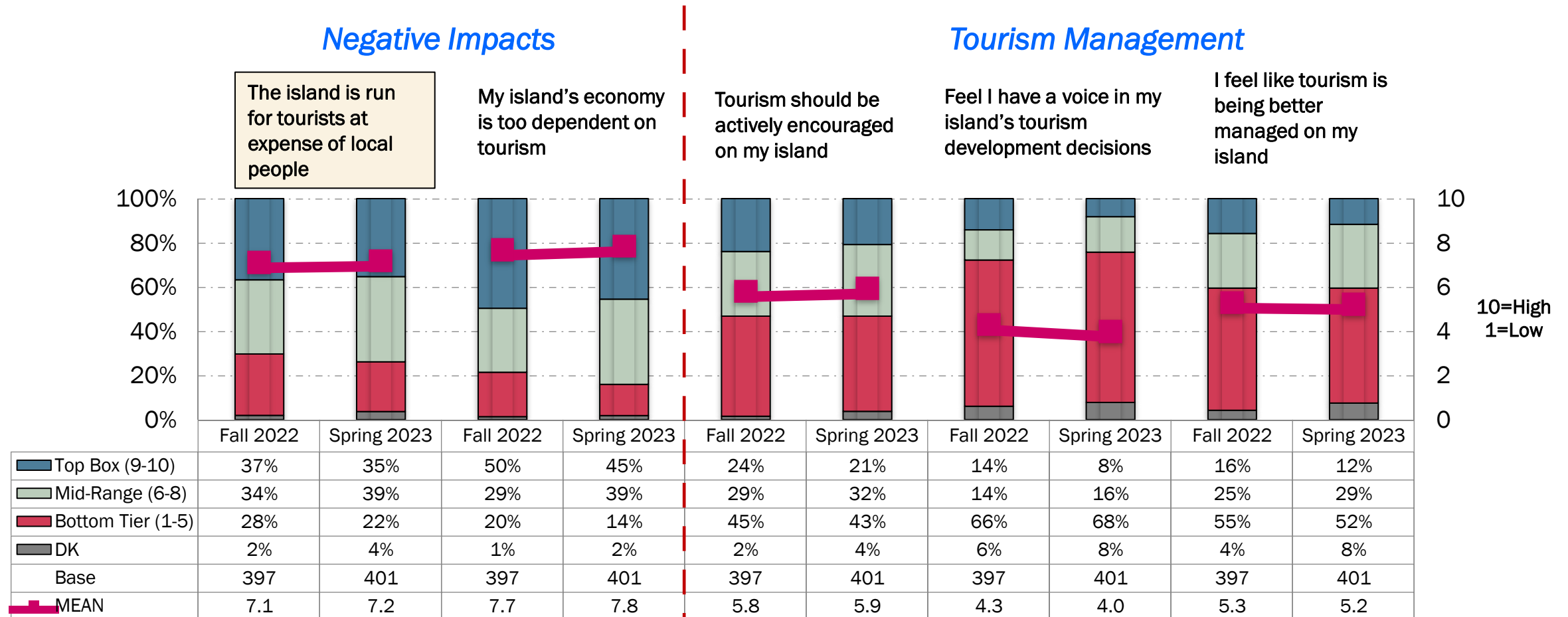


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

Resident sentiment has stabilized following a boost in 2022: Key indicators of resident sentiment leveled off since Fall'22 in the vital measures of the industry providing more benefits than problems and being better managed overall.

Key Resident Sentiment Tracking Statements (Hawai'i Island)

Mean Score	Fall 2021	Spring 2022	Fall 2022	Spring 2023
<i>Tourism has brought more benefits than problems</i>	5.60	5.99	5.84	5.67
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	--	--	6.72	6.76
<i>Perceived impact of tourism on you and your family</i>	5.91	6.18	6.34	6.13
<i>My island is run for tourists at expense of local people</i>	6.63	6.51	6.62	6.40

Overall, Hawai'i island residents are less likely to perceive the negative effects compared to other areas (*My island is run for tourists, too dependent on tourism*). These residents also acknowledge that the tax revenues brought in by the industry do help mitigate some of the issues.

Mean Score	O'ahu	Hawai'i Island	Maui County	Kaua'i
<i>My island is run for tourists at expense of local people</i>	6.9	6.4	7.2	7.1
<i>My island's economy is too dependent on tourism</i>	7.8	7.1	7.8	8.2
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	6.6	6.8	6.3	6.6

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

2

Community Differences: Residents of West Hawai'i Island, on the other hand, are experiencing the negative effects of the tourism industry more prominently. They are more likely to express the sentiment that their island is being run primarily for the benefit of tourists and that the island is too dependent on tourism. The concerns raised by residents in this area are driving up the overall negative perceptions for the island as a whole.

3

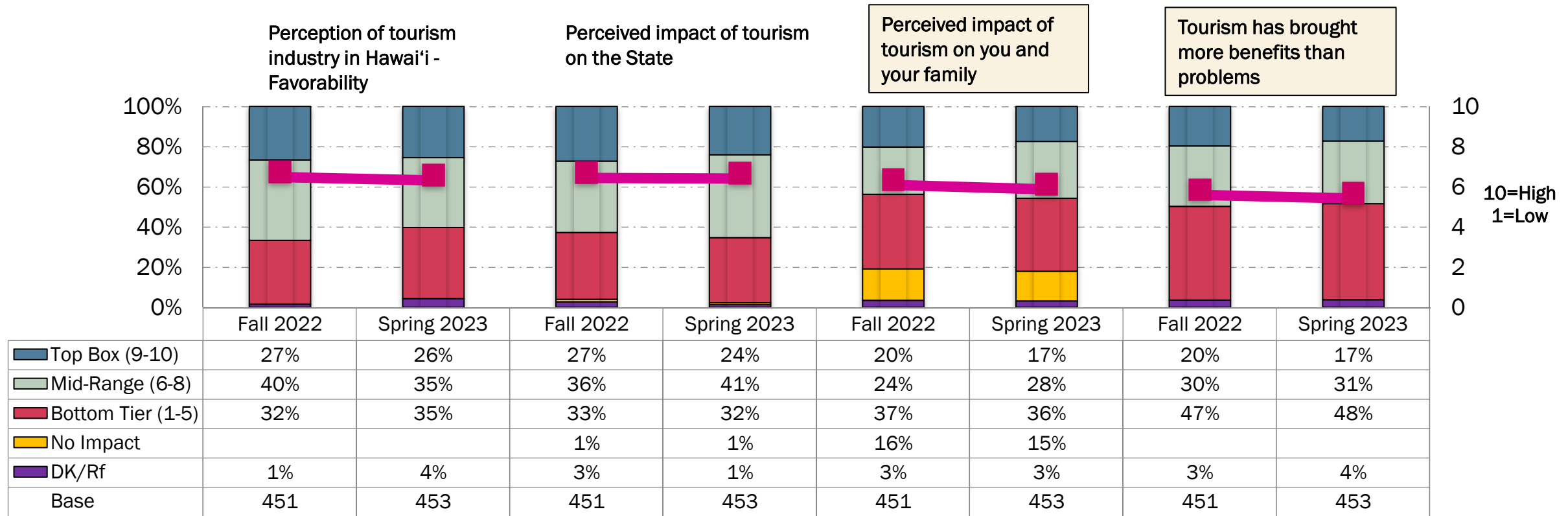
Support for Managed Tourism Strategies aligns with the problems generated by the industry: In addition to having weaker sentiment towards the tourism industry, residents of West Hawai'i Island are significantly more supportive of managed strategies, such as restricting the construction of additional visitor accommodations and implementing designated resident-only days. Furthermore, despite the additional tax revenue generated by the industry, residents in this area do not perceive it as worth the associated issues.

Mean Score	West Hawai'i	East Hawai'i
<i>Tourism worth the issues with \$2 billion in taxes for schools, hospitals, etc.</i>	6.3	7.1
<i>Do not allow additional hotel/condo/ timeshare</i>	6.8	6.2
<i>Designate resident-only days at some state parks, beaches and trails</i>	6.3	5.8

4

Awareness of Destination Management Action Plans rose to 25 percent during this time while familiarity with specific initiatives fared better at 40-44 percent aware.

Hawai'i Island – Key High Level Resident Sentiment Indicators

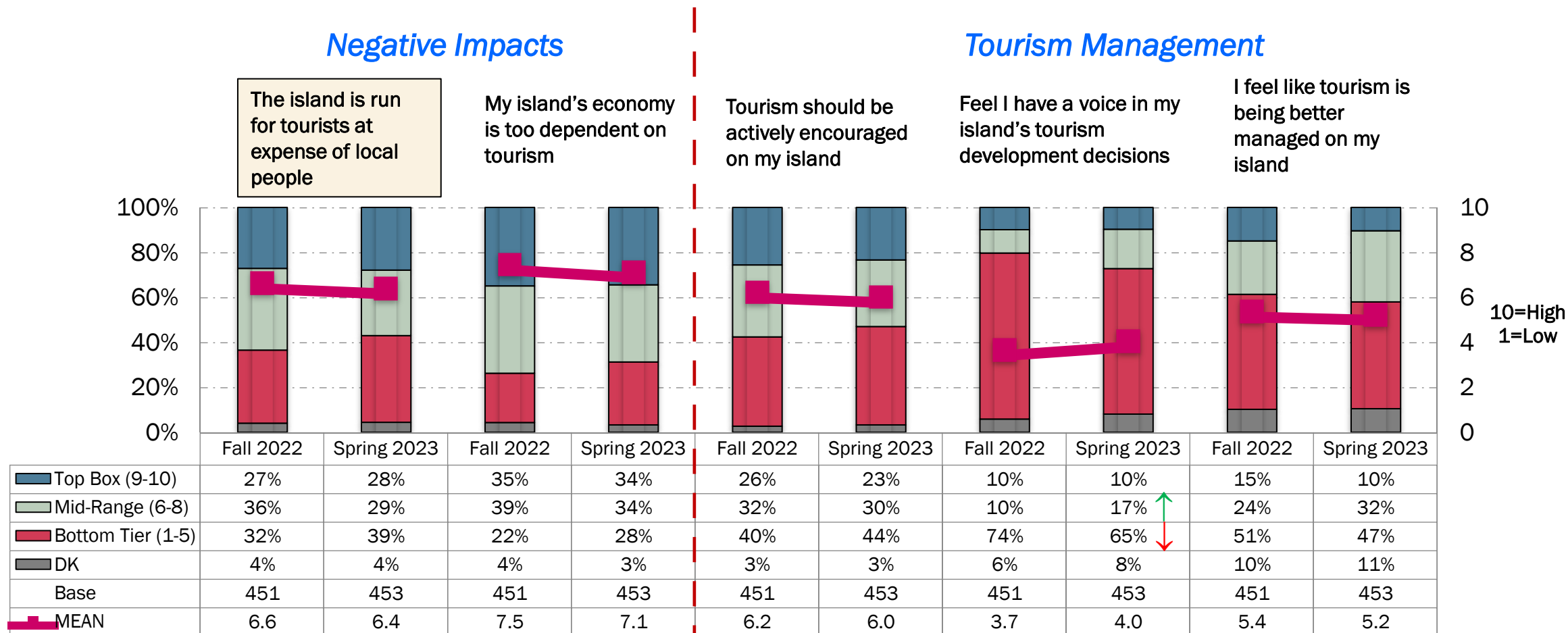


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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 – Kauaʻi

- 1 **Although key indicators made slight gains, sentiment was largely stable in Spring 2023:** Improvements that tourism’s benefits outweigh the risks and that the industry is better for families, while positive, did not result in a statistically significant increase.

Key Resident Sentiment Tracking Statements (Kauaʻi)

Mean Score	Fall 2021	Spring 2022	Fall 2022	Spring 2023
Tourism has brought more benefits than problems	5.22	5.61	5.72	5.81
Perceived impact of tourism on you and your family	6.27	5.97	6.14	6.36
Tourism is being better managed on my island	5.26	4.79	5.04	5.41
My island is run for tourists at expense of local people	7.07	7.43	7.15	7.14

The idea that tourism improves quality of life and provides support for other industries are two bright spots where Kauaʻi residents are more optimistic compared to other parts of the State.

Mean Score	Oʻahu	Hawaiʻi Island	Maui County	Kauaʻi
Tourism enhances residents’ quality of life	5.5	5.3	5.2	5.7
Supports our local businesses like retail, dining etc.	7.4	7.3	7.2	7.8

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

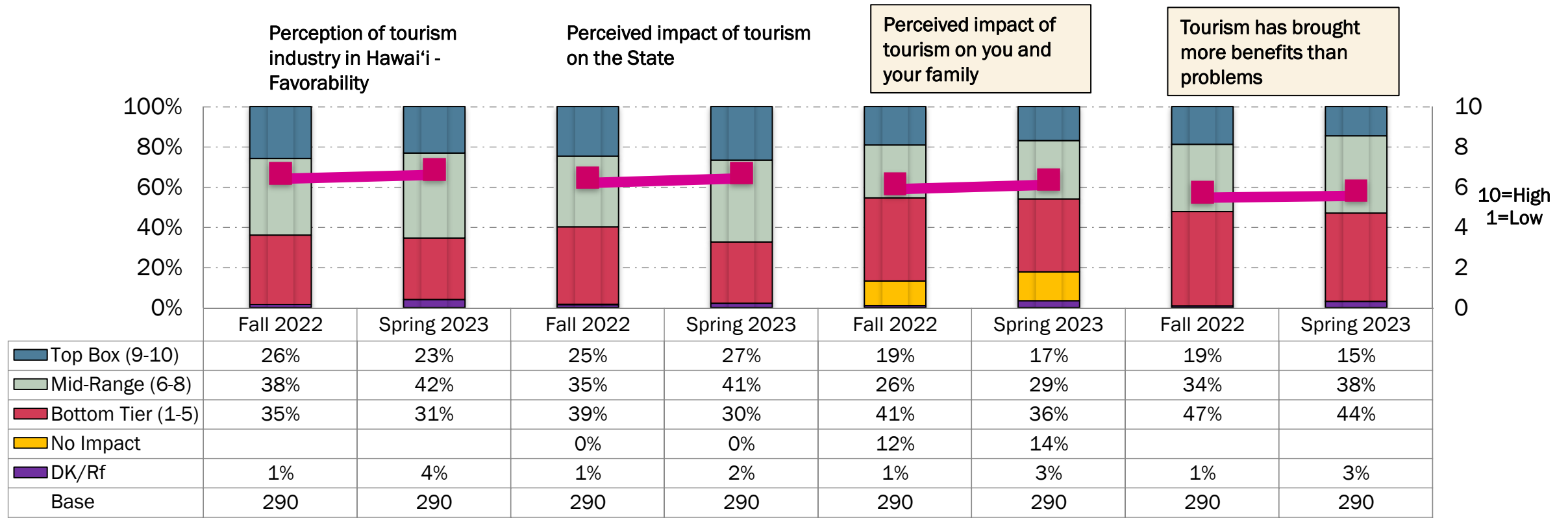
- 2 **Resident Sentiment is similar across Kauaʻi communities:** There were no significant differences between key tracking statements across the island, indicating that each area of the island shares similar sentiment towards the benefits and problems of tourism on the island.

- 3 **Kauaʻi reports the strongest support for Managed Tourism Strategies in the State:** Residents are more supportive of strategies aimed at better managing the tourism industry compared to the State overall. These strategies including measures related to accommodations, access, and educating visitors, are seen as effective ways to mitigate the negative impacts of tourism.

Mean Score	Kauaʻi	Gap to the State
Eliminate illegal vacation rentals	8.7	+1.0
No additional hotel/condo/timeshare units	8.1	+0.9
Stop approval of additional legal vacation rentals	7.9	+1.0
Charge access fees to state parks/trails	7.7	+0.8

- 4 Destination Management Action Plans awareness was inline with other parts of the State at 24 percent. Familiarity with specific programs such as policy efforts on appropriate behavior for visitors/residents, managing overtourism, and developing educational materials is much higher at 29-40 percent.

Kaua'i – Key High Level Resident Sentiment Indicators

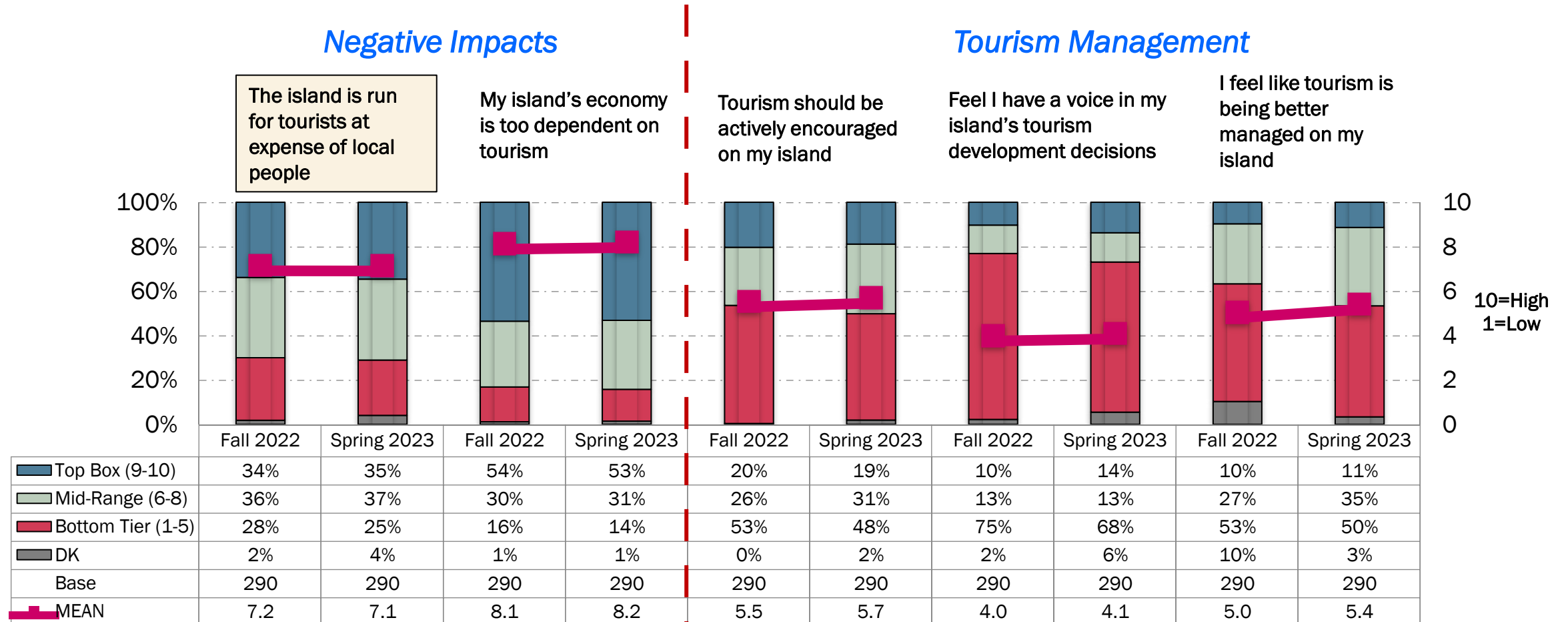


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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

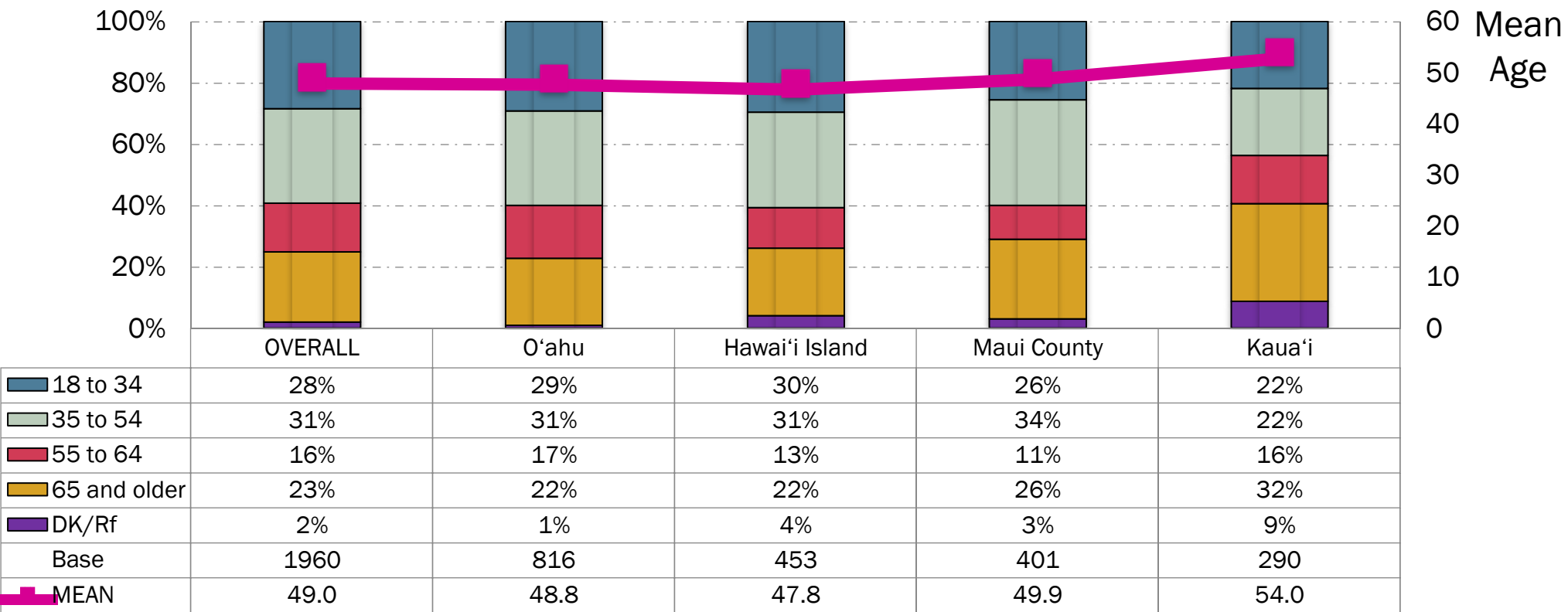


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?



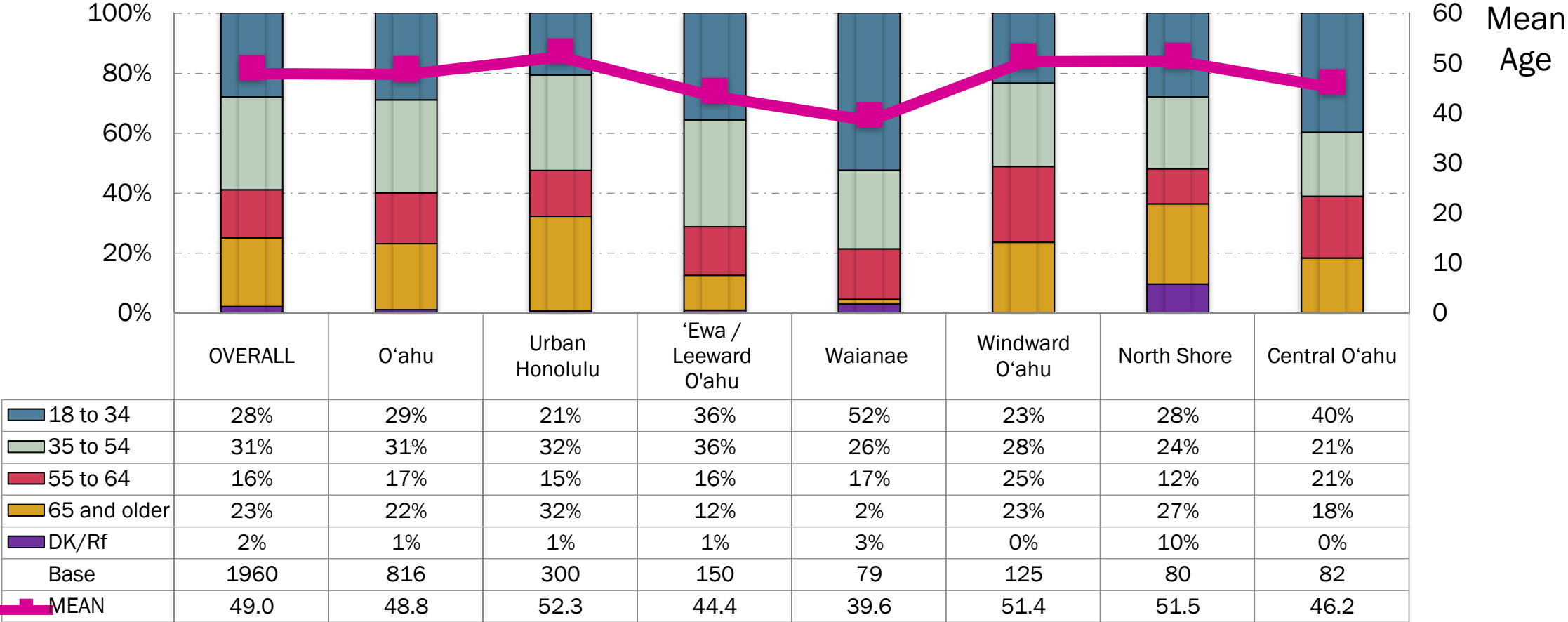
Appendix B: Respondent Profile

Respondent Age



D1: What was your age on your last birthday?

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



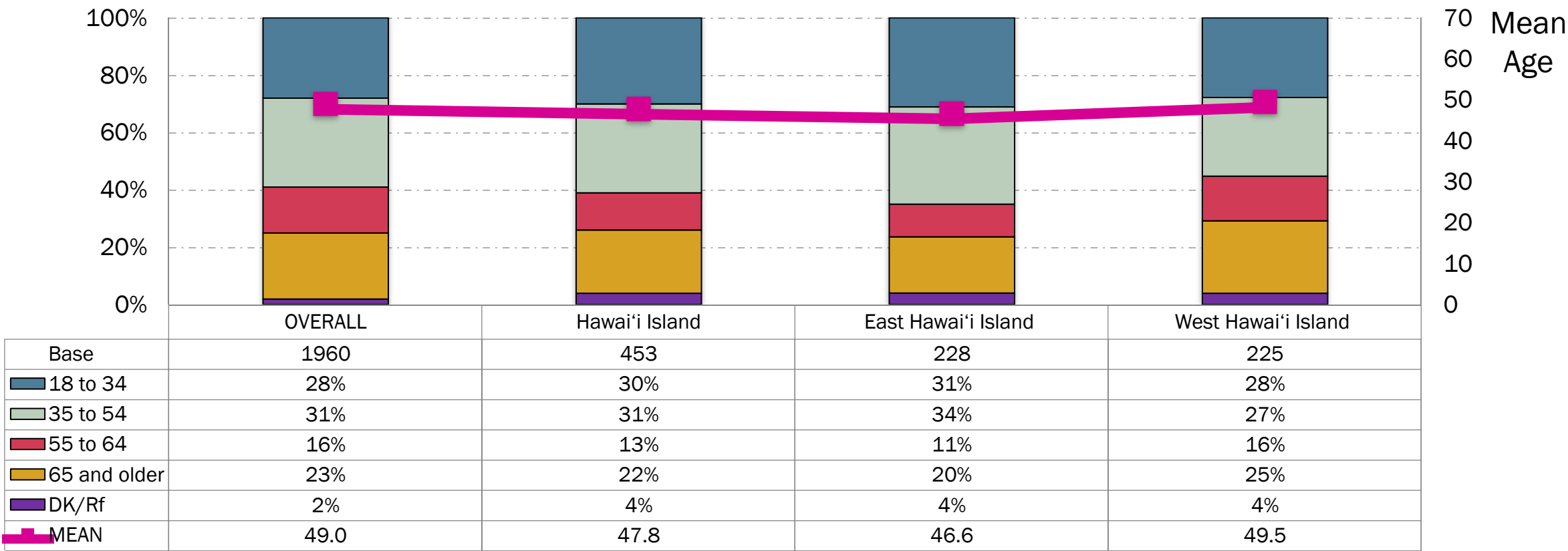
D1: What was your age on your last birthday?

Respondent Age (*By Area - Maui County*)



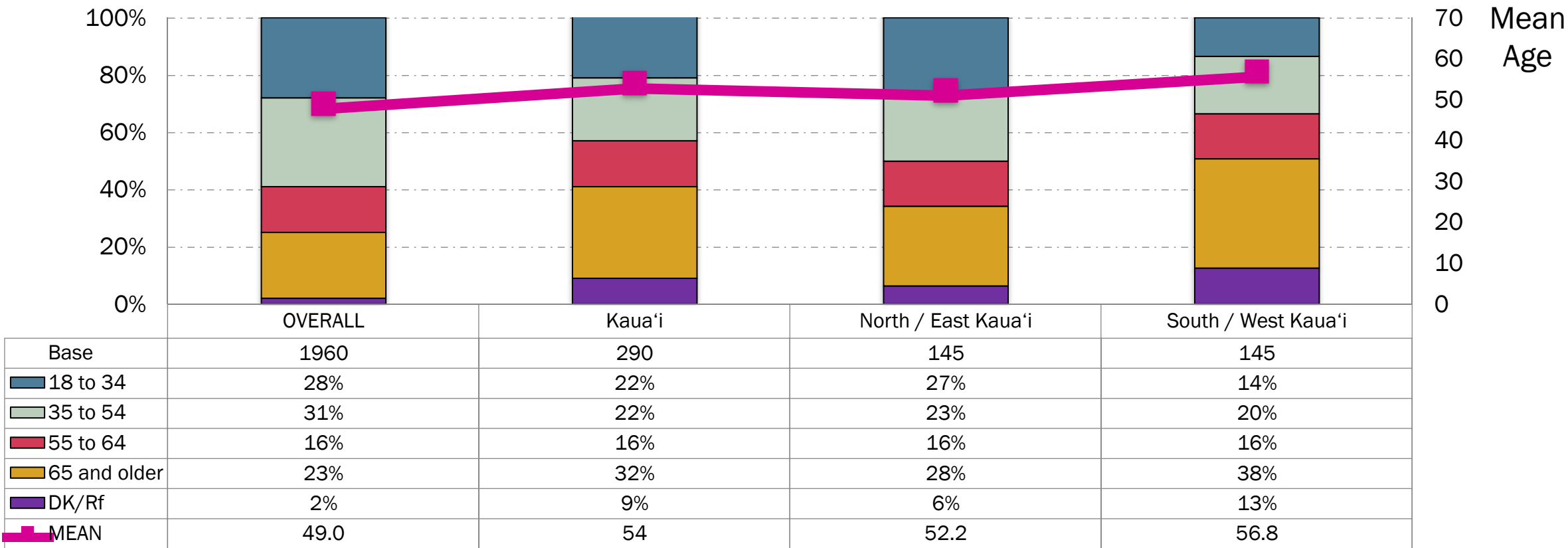
D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	20%	15%	32%	28%	28%
Japanese	18%	22%	9%	8%	9%
Hawaiian	24%	22%	27%	28%	24%
Filipino	10%	9%	9%	14%	18%
Other	28%	31%	23%	21%	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%	19%	11%	5%	18%	24%	12%
Japanese	18%	22%	27%	20%	2%	15%	2%	36%
Hawaiian	24%	22%	11%	29%	57%	27%	33%	23%
Filipino	10%	9%	7%	15%	9%	5%	11%	7%
Other	28%	31%	37%	26%	28%	35%	30%	22%

D2: What is your ethnic background?

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Caucasian	20%	32%	26%	40%
Japanese	18%	9%	12%	5%
Hawaiian	24%	27%	28%	26%
Filipino	10%	9%	10%	7%
Other	28%	23%	24%	22%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Caucasian	20%	28%	22%	30%	22%	27%
Japanese	18%	8%	7%	8%	4%	11%
Hawaiian	24%	28%	35%	26%	42%	15%
Filipino	10%	14%	16%	13%	17%	47%
Other	28%	21%	19%	23%	14%	--

D2: What is your ethnic background?

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Caucasian	20%	28%	28%	29%
Japanese	18%	9%	11%	5%
Hawaiian	24%	24%	24%	23%
Filipino	10%	18%	14%	24%
Other	28%	22%	24%	19%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	45%	46%	46%	40%	40%
3-4	32%	32%	31%	37%	29%
5-6	14%	15%	11%	10%	13%
7+	6%	4%	9%	10%	14%
REFUSED	5%	4%	7%	6%	13%
MEAN	3.0	2.9	3.0	3.3	3.2

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	45%	46%	60%	33%	16%	51%	41%	39%
3-4	32%	32%	28%	35%	26%	35%	21%	41%
5-6	14%	15%	9%	23%	24%	10%	21%	17%
7+	6%	4%	2%	5%	21%	1%	10%	2%
REFUSED	5%	4%	1%	5%	14%	4%	10%	1%
MEAN	3.0	2.9	2.5	3.3	4.8	2.7	3.5	3.1

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

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
1-2	45%	46%	47%	45%
3-4	32%	31%	34%	26%
5-6	14%	11%	10%	12%
7+	6%	9%	7%	12%
REFUSED	5%	7%	6%	8%
MEAN	3.0	3.0	2.9	3.2

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

Household Size (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
1-2	45%	40%	39%	38%	56%	74%
3-4	32%	37%	34%	38%	31%	22%
5-6	14%	10%	10%	10%	6%	3%
7+	6%	10%	9%	10%	6%	2%
REFUSED	5%	6%	11%	6%	3%	2%
MEAN	3.0	3.3	3.2	3.4	2.7	2.1

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

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	45%	40%	40%	40%
3-4	32%	29%	27%	32%
5-6	14%	13%	16%	8%
7+	6%	14%	11%	19%
REFUSED	5%	13%	12%	13%
MEAN	3.0	3.2	3.1	3.2

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	33%	34%	30%	30%	24%
Married	42%	41%	39%	46%	43%
Divorced, separated, widowed	15%	14%	15%	13%	22%
Domestic Partnership	7%	7%	9%	5%	2%
Other	1%	1%	1%	0%	0%
Refused	4%	3%	6%	5%	8%

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	33%	34%	36%	35%	44%	33%	21%	24%
Married	42%	41%	39%	42%	26%	42%	49%	54%
Divorced, separated, widowed	15%	14%	16%	12%	9%	17%	20%	7%
Domestic Partnership	7%	7%	6%	7%	8%	4%	5%	10%
Other	1%	1%	0%	1%	3%	1%	--	--
Refused	4%	3%	2%	2%	10%	4%	4%	4%

D4: What is your marital status?

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

	OVERALL	Hawai‘i Island	East Hawai‘i Island	West Hawai‘i Island
Single, never married	33%	30%	32%	28%
Married	42%	39%	37%	40%
Divorced, separated, widowed	15%	15%	14%	17%
Domestic Partnership	7%	9%	11%	7%
Other	1%	1%	1%	1%
Refused	4%	6%	5%	6%

D4: What is your marital status?

Marital Status (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
Single, never married	33%	30%	24%	33%	11%	16%
Married	42%	46%	49%	45%	60%	47%
Divorced, separated, widowed	15%	13%	15%	11%	27%	35%
Domestic Partnership	7%	5%	2%	6%	--	--
Other	1%	0%	0%	--	--	--
Refused	4%	5%	10%	5%	2%	2%

D4: What is your marital status?

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Single, never married	33%	24%	25%	22%
Married	42%	43%	43%	43%
Divorced, separated, widowed	15%	22%	24%	20%
Domestic Partnership	7%	2%	3%	1%
Other	1%	0%	--	1%
Refused	4%	8%	5%	12%

D4: What is your marital status?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	21%	20%	26%	25%	26%
Bus/Trade School/ Some college	27%	26%	30%	28%	28%
College Graduate	49%	52%	39%	44%	38%
DK/Refused	3%	2%	5%	4%	8%

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%	20%	15%	28%	45%	15%	8%	9%
Bus/Trade School/ Some college	27%	26%	23%	27%	36%	31%	32%	27%
College Graduate	49%	52%	61%	44%	14%	53%	52%	63%
DK/Refused	3%	2%	1%	1%	4%	1%	7%	1%

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

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
H.S. or less	21%	26%	26%	25%
Bus/Trade School/ Some college	27%	30%	29%	25%
College Graduate	49%	39%	39%	37%
DK/Refused	3%	5%	6%	12%

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

Education (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
H.S. or less	21%	25%	12%	28%	17%	24%
Bus/ Trade School/ Some college	27%	28%	40%	26%	22%	33%
College Graduate	49%	44%	39%	44%	59%	42%
DK/Refused	3%	4%	9%	2%	3%	2%

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

Education (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
H.S. or less	21%	26%	26%	25%
Bus/ Trade School/ Some college	27%	28%	29%	25%
College Graduate	49%	38%	39%	37%
DK/Refused	3%	8%	6%	12%

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

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	63%	64%	58%	61%	56%
Not Employed	37%	36%	42%	39%	44%

D6: Are you currently employed?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Currently Employed	63%	64%	66%	69%	47%	68%	62%	56%
Not Employed	37%	36%	34%	31%	53%	32%	38%	44%

D6: Are you currently employed?

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Currently Employed	63%	58%	57%	59%
Not Employed	37%	42%	43%	41%

D6: Are you currently employed?

Employment Status (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Currently Employed	63%	61%	64%	62%	41%	42%
Not Employed	37%	39%	36%	38%	59%	58%

D6: Are you currently employed?

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	63%	56%	60%	49%
Not Employed	37%	44%	40%	51%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	49%	51%	45%	46%	45%
FEMALE	50%	48%	55%	52%	55%
OTHER	1%	1%	1%	2%	1%

D7: What is your gender?

Gender (*By Area - O'ahu*)

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
MALE	49%	51%	54%	51%	42%	47%	44%	47%
FEMALE	50%	48%	45%	48%	55%	50%	55%	53%
OTHER	1%	1%	1%	1%	3%	3%	1%	0%

D7: What is your gender?

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
MALE	49%	45%	45%	43%
FEMALE	50%	55%	54%	57%
OTHER	1%	1%	1%	0%

D7: What is your gender?

Gender (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
MALE	49%	46%	50%	46%	40%	37%
FEMALE	50%	52%	45%	52%	60%	61%
OTHER	1%	2%	5%	2%	0%	2%

D7: What is your gender?

Gender (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
MALE	49%	45%	48%	39%
FEMALE	50%	55%	51%	61%
OTHER	1%	1%	1%	1%

D7: What is your gender?

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	12%	12%	9%	11%	11%
Management	5%	6%	5%	5%	6%
Admin/clerical	6%	7%	4%	4%	5%
Service (Hotel/Restaurant)	5%	4%	7%	6%	6%
Sales	5%	4%	5%	7%	5%
Retired/ Unemployed	37%	36%	42%	39%	44%
Other	27%	28%	25%	25%	21%
Refused	3%	3%	3%	4%	2%

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	12%	12%	16%	10%	7%	7%	13%	12%
Management	5%	6%	6%	7%	--	7%	5%	2%
Admin/clerical	6%	7%	8%	8%	6%	6%	3%	6%
Service (Hotel/ Restaurant)	5%	4%	4%	5%	6%	5%	2%	3%
Sales	5%	4%	2%	6%	5%	7%	7%	4%
Retired/ Unemployed	37%	36%	35%	31%	53%	32%	38%	44%
Other	27%	28%	27%	28%	24%	35%	22%	29%
Refused	3%	3%	3%	4%	1%	1%	10%	1%

D8: What is your occupation?

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Professional	12%	9%	10%	8%
Management	5%	5%	4%	7%
Admin/clerical	6%	4%	5%	3%
Service (Hotel/ Restaurant)	5%	7%	8%	5%
Sales	5%	5%	6%	3%
Retired/ Unemployed	37%	42%	43%	41%
Other	27%	25%	23%	27%
Refused	3%	3%	1%	5%

D8: What is your occupation?

Occupation (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Professional	12%	11%	11%	11%	7%	7%
Management	5%	5%	3%	5%	10%	7%
Admin/ clerical	6%	4%	4%	4%	3%	3%
Service (Hotel/ Restaurant)	5%	6%	9%	6%	--	9%
Sales	5%	7%	6%	7%	3%	5%
Retired/ Unemployed	37%	39%	36%	38%	61%	58%
Other	27%	25%	29%	26%	13%	9%
Refused	3%	4%	2%	4%	3%	2%

D8: What is your occupation?

Occupation (*By Area - Kaua'i*)

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Professional	12%	11%	11%	9%
Management	5%	6%	6%	6%
Admin/clerical	6%	5%	7%	3%
Service (Hotel/ Restaurant)	5%	6%	5%	6%
Sales	5%	5%	6%	4%
Retired/ Unemployed	37%	44%	40%	51%
Other	27%	21%	23%	17%
Refused	3%	2%	1%	3%

D8: What is your occupation?

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	11%	10%	17%	7%	8%
\$25K-\$35K	10%	11%	11%	9%	6%
\$35K-\$50K	12%	13%	14%	9%	10%
\$50K-\$75K	13%	12%	16%	15%	10%
\$75K-\$100K	16%	17%	13%	15%	15%
\$100K-\$150K	16%	17%	9%	16%	14%
\$150K-\$200K	7%	8%	4%	6%	6%
\$200K+	4%	4%	2%	4%	4%
DK/ Rf	11%	8%	14%	17%	26%

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

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
<\$25K	11%	10%	10%	10%	38%	8%	3%	4%
\$25K-\$35K	10%	11%	10%	12%	27%	7%	9%	5%
\$35K-\$50K	12%	13%	11%	17%	8%	6%	9%	17%
\$50K-\$75K	13%	12%	13%	11%	3%	15%	14%	13%
\$75K-\$100K	16%	17%	17%	18%	6%	17%	9%	24%
\$100K-\$150K	16%	17%	17%	17%	2%	20%	13%	24%
\$150K-\$200K	7%	8%	9%	8%	--	11%	10%	7%
\$200K+	4%	4%	6%	2%	4%	3%	5%	2%
DK/ Rf	11%	8%	7%	6%	12%	14%	29%	4%

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

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
<\$25K	11%	17%	22%	10%
\$25K-\$35K	10%	11%	12%	9%
\$35K-\$50K	12%	14%	17%	10%
\$50K-\$75K	13%	16%	18%	14%
\$75K-\$100K	16%	13%	10%	18%
\$100K-\$150K	16%	9%	7%	11%
\$150K-\$200K	7%	4%	3%	5%
\$200K+	4%	2%	1%	4%
DK/ Rf	11%	14%	11%	19%

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

Household Income (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
<\$25K	11%	7%	8%	7%	4%	7%
\$25K-\$35K	10%	9%	5%	11%	3%	9%
\$35K-\$50K	12%	9%	9%	10%	4%	13%
\$50K-\$75K	13%	15%	14%	15%	17%	9%
\$75K-\$100K	16%	15%	15%	16%	13%	9%
\$100K-\$150K	16%	16%	19%	16%	11%	15%
\$150K-\$200K	7%	6%	7%	6%	--	7%
\$200K+	4%	4%	4%	4%	1%	3%
DK/ Rf	11%	17%	19%	15%	46%	27%

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

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
<\$25K	11%	8%	12%	2%
\$25K-\$35K	10%	6%	5%	9%
\$35K-\$50K	12%	10%	13%	5%
\$50K-\$75K	13%	10%	10%	12%
\$75K-\$100K	16%	15%	16%	13%
\$100K-\$150K	16%	14%	18%	8%
\$150K-\$200K	7%	6%	5%	8%
\$200K+	4%	4%	4%	5%
DK/ Rf	11%	26%	19%	38%

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

Years in Hawai'i

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Less than 10 years	13%	12%	19%	12%	7%
10 to 19 years	8%	7%	10%	11%	7%
20 years or more	20%	21%	17%	21%	22%
Born in Hawai'i	57%	59%	50%	53%	56%
DK/ Rf	2%	1%	5%	3%	8%

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

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Less than 10 years	13%	12%	12%	13%	7%	10%	11%	15%
10 to 19 years	8%	7%	7%	4%	8%	6%	9%	8%
20 years or more	20%	21%	24%	18%	7%	26%	24%	16%
Born in Hawai'i	57%	59%	56%	62%	76%	57%	50%	60%
DK/ Rf	2%	1%	1%	2%	1%	1%	5%	--

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

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Less than 10 years	13%	19%	18%	20%
10 to 19 years	8%	10%	9%	11%
20 years or more	20%	17%	18%	16%
Born in Hawai'i	57%	50%	52%	46%
DK/ Rf	2%	5%	3%	7%

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

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

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Less than 10 years	13%	12%	14%	12%	7%	3%
10 to 19 years	8%	11%	4%	13%	3%	3%
20 years or more	20%	21%	18%	20%	37%	45%
Born in Hawai'i	57%	53%	59%	52%	51%	49%
DK/ Rf	2%	3%	5%	2%	3%	2%

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

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Less than 10 years	13%	7%	6%	7%
10 to 19 years	8%	7%	10%	4%
20 years or more	20%	22%	20%	24%
Born in Hawai'i	57%	56%	57%	55%
DK/ Rf	2%	8%	6%	11%

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

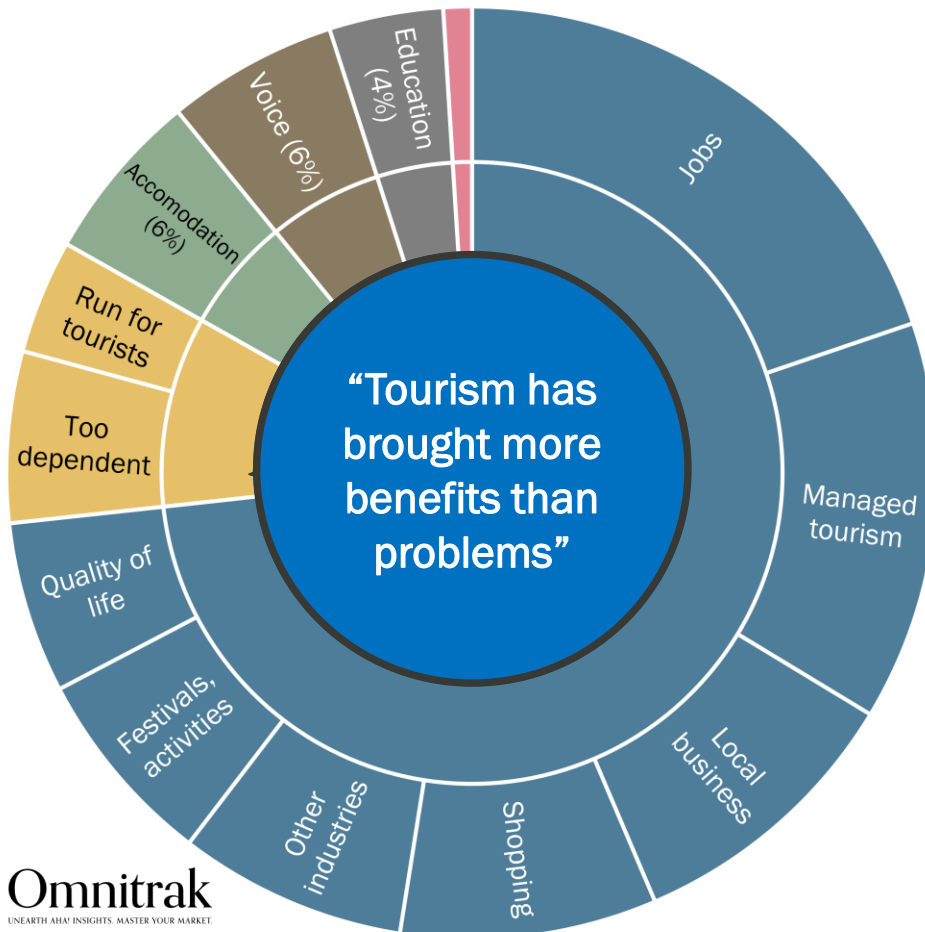


Appendix C: Resident Sentiment Drivers Analysis

Drivers of Resident Sentiment

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

- Creates job opportunities for residents: 11%
- Supports local businesses: 10%
- Create job opportunities with paths for advancement: 9%
- Creates shopping, restaurants and entertainment opportunities for residents: 9%



Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Quality of Life Benefits, Managed Tourism (74%) Fall '22 82% Spring '22 78%	Creates job opportunities for residents	11%
	Supports local businesses	10%
	Creates jobs opportunities with paths for advancement	9%
	Creates shopping, restaurants and entertainment opportunities for residents	9%
	Supports other industries like agriculture	8%
	Sponsors festivals, activities & sports events for residents & visitors	7%
	Is an industry that enhances residents' quality of life	6%
	Helps fund the stewardship of Hawai'i's natural resources, parks and cultural sites	5%
	Should be actively encouraged on my island	3%
	Contributes to the perpetuation of Native Hawaiian culture and language	3%
	Tourism is being better managed on my island	2%
	More effort is being made to balance economic benefits of tourism and quality of life for residents	1%
	Natural resources in my community are being improved and better maintained	0%
Negative Impacts (10%) Fall '22 6% Spring '22 9%	My island's economy is too dependent on tourism	6%
	This island is being run for tourists at the expense of local people	4%
Voice (6%) Fall '22 4%	I have a voice in my island's tourism development decisions	6%
Accommodation (6%) Fall '22 0% Spring '22 8%	Eliminate illegal vacation rentals	3%
	Stop approval of additional legal vacation rentals	2%
	Do not allow building of additional hotel/condo/timeshare units	1%
Education (4%) Fall '22 4% Spring '22 3%	Authentic presentation of Native Hawaiian language and culture	2%
	Educate visitors and residents to mālama the islands and each other	1%
	Educate visitors about protecting Hawai'i's natural environment & cultural resources	1%
Access (0%) Fall '22 4% Spring '22 8% Fall '21 4%	Designate resident-only days of the week at some state parks, beaches and trails	0%
	Charge visitors fees to access public parks and trails	0%
	Encourage visitors to volunteer and give back during their visits to Hawai'i	0%



Mahalo from the Omnitrak Group