



Resident Sentiment Survey – Spring 2025

Table of Contents

	<u>Page</u>
Research Objectives	3
Sample Plan and Methodology	4
Key Takeaways	5
Executive Summary	7
Detailed Findings	22
Impact of the Visitor Industry	23
Destination Management Action Plans	109
Economic Diversification	116
Impact of Tourism's Slow Recovery	124
Use of Tax Revenues to Manage/Encourage Tourism	135
Tourism Worth the Issues	146
General Perceptions of the Visitor Industry	152
Appendix A: Island Supplement	205
Appendix B: Respondent Profile	220

Research Objectives

- Positive resident sentiment toward Hawai‘i’s visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state’s economy overall.
- The Resident Sentiment Survey (RSS) has been conducted since 1988, and the current survey was conducted by Omnitrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai‘i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.
- **Statistical Analysis** – Within the reports’ graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. islands or attributes) in the same year at the 95% level of confidence.
An arrow  or  indicates a statistically significant difference when ratings are compared across years at the 95% confidence level.

Sample Plan and Methodology

Sample Plan

Omnitrak used a region-based stratified sampling for the study, consistent with earlier Resident Sentiment Survey efforts conducted by Omnitrak since 2009. The sampling plan divided the State into 12 sub-regions with consideration to population proportion and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionately to population distribution per the latest State Census from the State Department of Business, Economic Development and Tourism.

Statewide sampling produced a total of $n = 1918$ respondents as follows:

- O‘ahu: 810
- Hawai‘i Island: 453
- Maui Island: 324, Moloka‘i: 36, Lāna‘i: 15
- Kaua‘i: 280

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interviews (CATI, 25%) and online surveys (75%).
- All calls were placed from Omnitrak’s continuously quality-controlled calling center in Downtown Honolulu.
- Field Dates: March 3 through June 1, 2025

Key Takeaways



Key Takeaways – State Overall

- 1 **Hawai‘i’s slow pace of tourism’s pandemic recovery is a concern this year, but residents see efforts to manage tourism gaining ground:** Nearly two-thirds (63%) of residents worry that tourism’s slow rebound is hurting the state’s overall economy. With this concern, support for using tax dollars to encourage tourism has increased significantly. However, concerns about tourism growth remain, and support for using tax dollars to support Managed Tourism efforts has also grown.

% Agree (ratings of 6-10)	Spring 2022	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Tax dollars should be spent to ENCOURAGE tourism in my community	42%	40%	41%	42%	47% ↑
Tax dollars should be spent to MANAGE the impacts of tourism in my community	66%	67%	66%	65%	68%

More residents now acknowledge efforts to better manage tourism and balance tourism’s benefits with everyday quality-of-life aspects. Further, perceptions of having a voice in tourism decisions have inched up but remain weak, signaling the need for stronger community engagement.

Mean Scores	Spring 2022	Fall 2022	Spring 2023	Spring 2024	Spring 2025
More effort is made to balance economic benefits of tourism and quality of life for residents	5.6	5.7	5.6	5.6	6.0 ↑
Tourism is being better managed on my island	5.3	5.4	5.3	5.6 ↑	5.9 ↑
I have a voice in my island's tourism development decisions	4.0	4.0	3.8	4.2 ↑	4.4

- 2 **High-level key sentiment measures improved in 2025:** Residents now view tourism more favorably, believe it delivers greater statewide benefits, and feel a modestly stronger positive impact on their own households. Collectively, these gains build on the view that the industry creates “more benefits than problems.”

Mean Scores	Spring 2022	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Perception of tourism industry in Hawai‘i - Favorability	6.62	6.65	6.66	6.80	7.03 ↑
Perceived impact of tourism on the state	6.55	6.69	6.65	6.78	6.98 ↑
Perceived impact of tourism on you and your family	6.02	6.21	6.10	6.33	6.46
Tourism has brought more benefits than problems	5.94	6.05	5.92	6.07	6.22
My island is run for tourists at expense of local people*	6.93	6.92	6.87	6.93	6.81

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

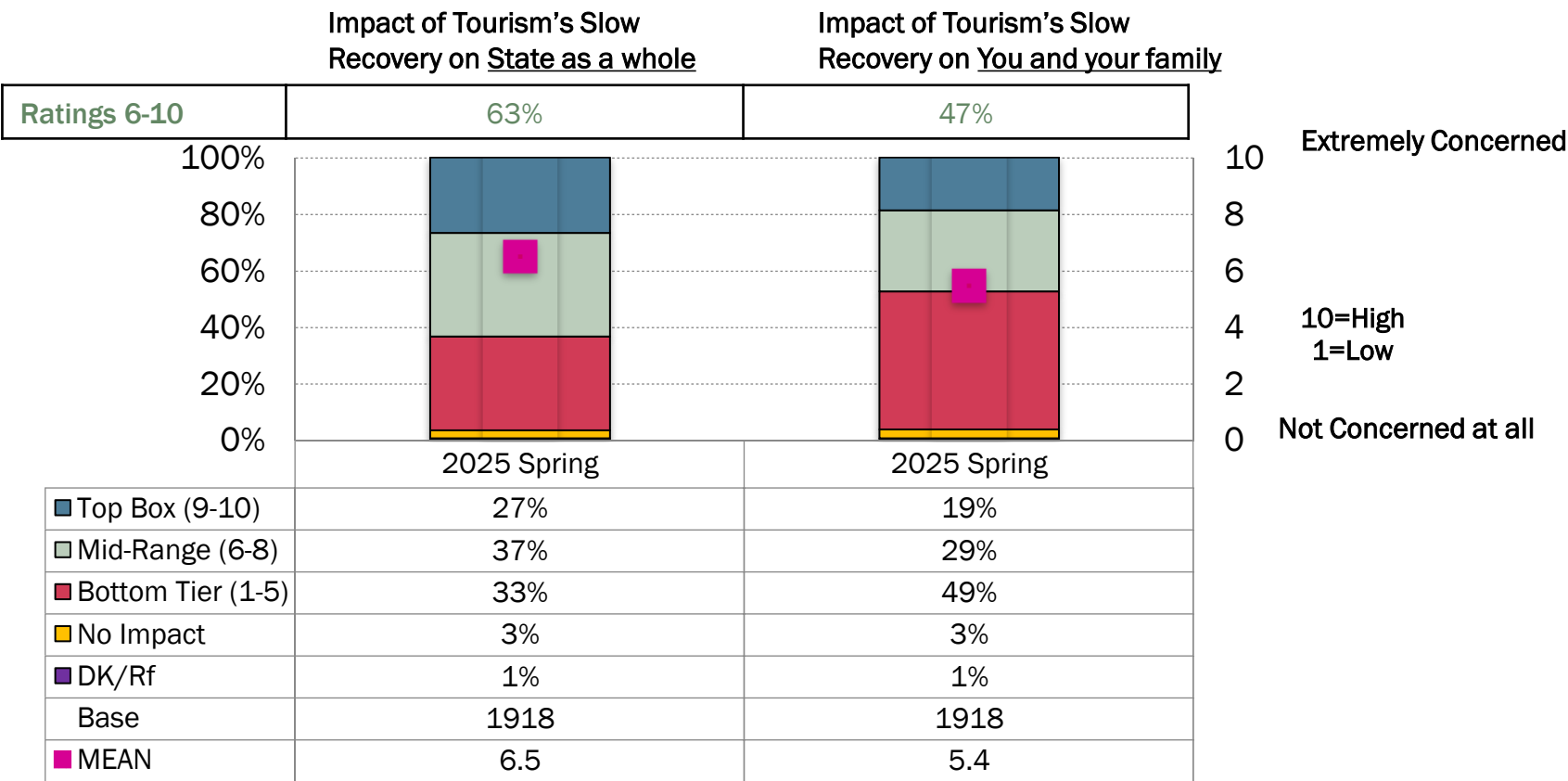
- 3 **While key sentiment indicators have improved, recovery remains fragile:** The “My island is run for tourists” metric refuses to budge, an indication that tackling the industry’s problems and including the community’s voice are pivotal to turning the current tentative optimism into long-term support for the industry. Further, while the gains in key sentiment indicators in 2025 are notable, the recovery remains fragile and continued improvement is dependent on the industry’s economic/quality of life benefits and efforts to better manage tourism.

Executive Summary



Executive Summary – Impact of Tourism’s Slow Recovery

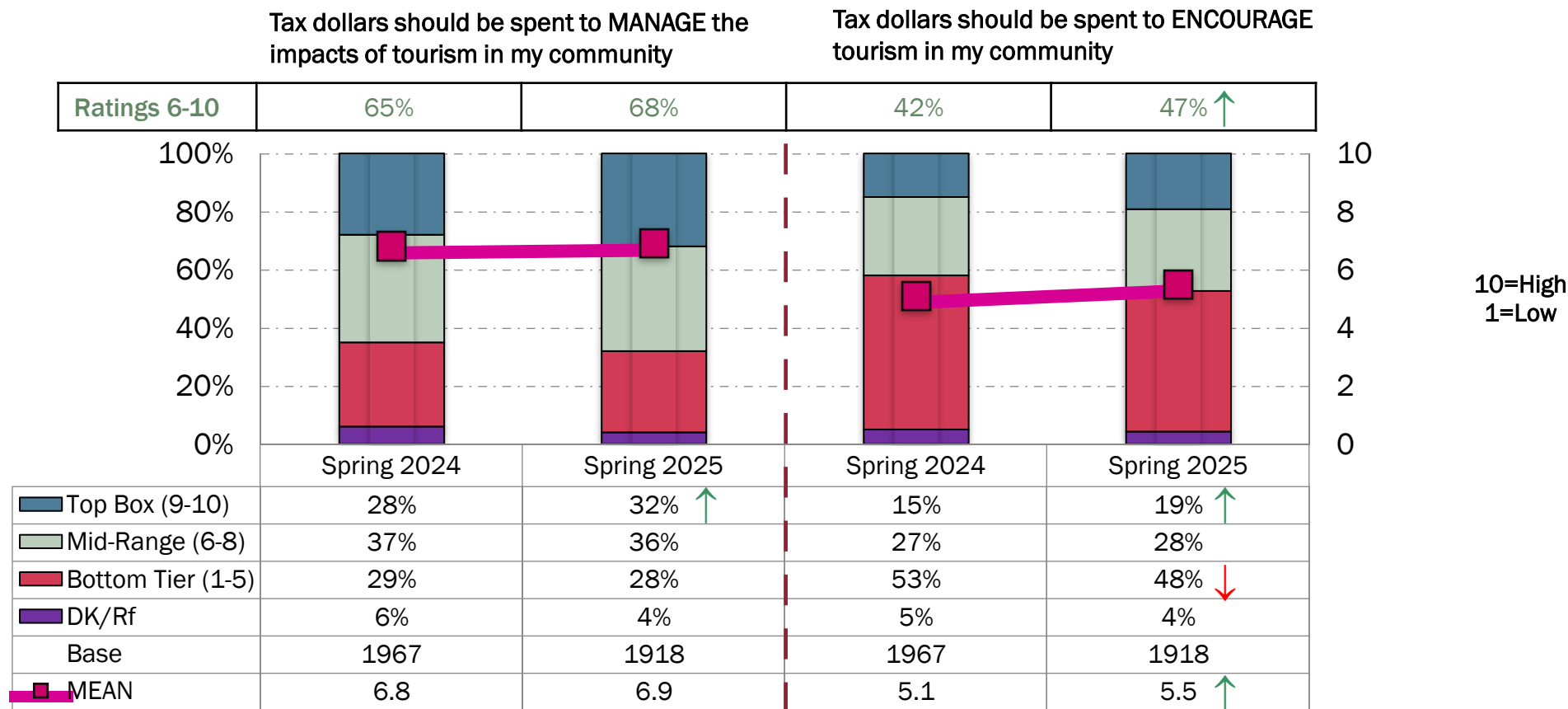
Nearly two-thirds of residents worry that tourism’s slow rebound is hurting the state’s overall economy, though fewer than half feel the downturn is hurting their own household, highlighting a gap between the impact on the State as a whole and on individual households.



Q13. Hawai’i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

Executive Summary – Tax Dollars Should be Spent to Manage Tourism

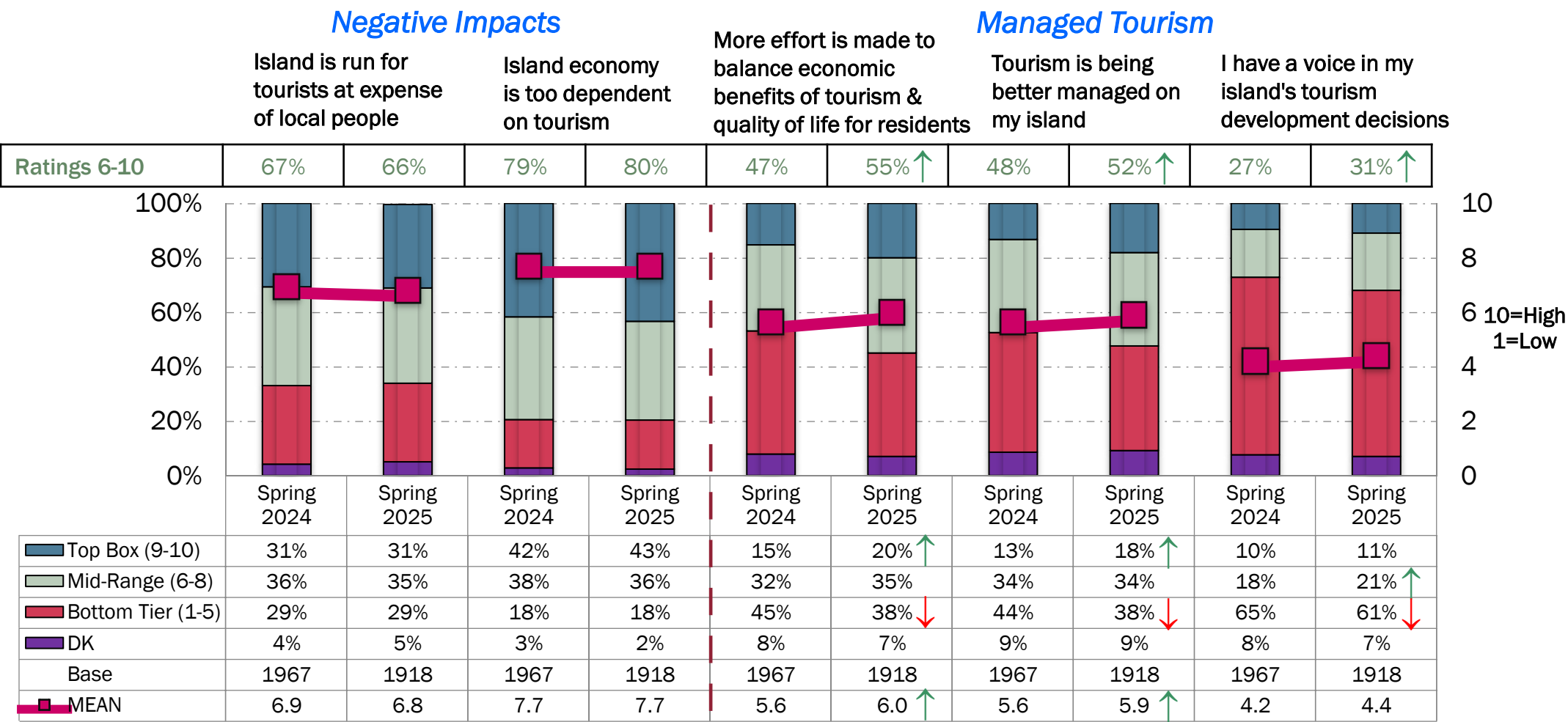
Within a marketplace concerned with tourism’s slow recovery, support for using tax dollars to encourage tourism has increased significantly in 2025 (i.e., the first notable rise in this measure since it was benchmarked in Spring 2022). However, concerns regarding tourism’s growth remain, and support for using tax dollars to address tourism’s impacts via Managed Tourism efforts has also grown.



Q13.1 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 – Balance: Negative Impacts/Managed Tourism

While perceptions of the negative impacts of tourism are holding relatively steady, perceptions of managed tourism have strengthened. Significant gains are seen in the number of residents who believe more effort is being made to balance tourism’s economic benefits with its impact on residents’ quality of life, who see tourism as being better managed on their island, and who have a voice in tourism decisions.



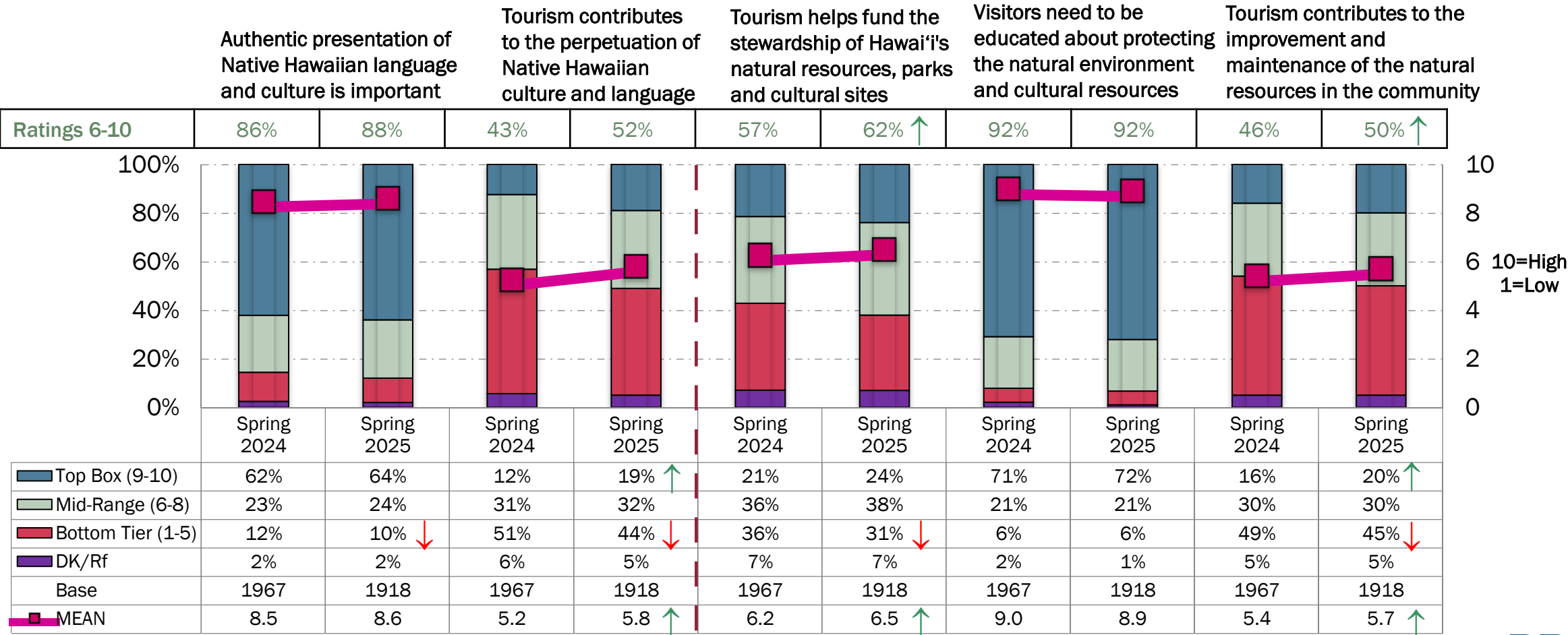
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary – Native Hawaiian Culture and Sustainability

With tourism management programs setting in, significant increases are seen in resident attitudes towards tourism’s contributions to perpetuating the Native Hawaiian language/culture, and helping fund stewardship, improvement and maintenance of natural resources and cultural sites. While these gains are positive first steps, much room for further improvement remains in these areas.

Native Hawaiian Cultural Indicators

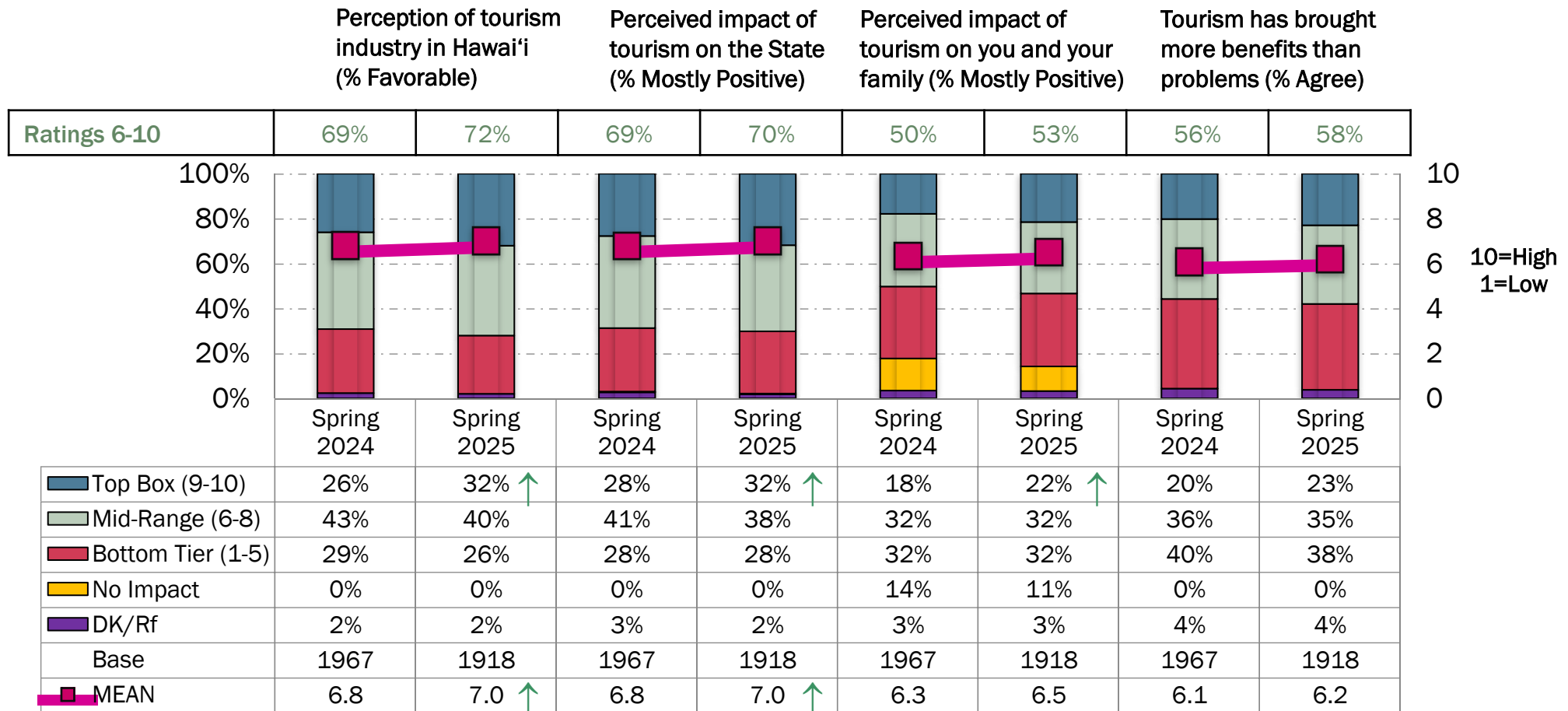
Sustainability and Natural Resources



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

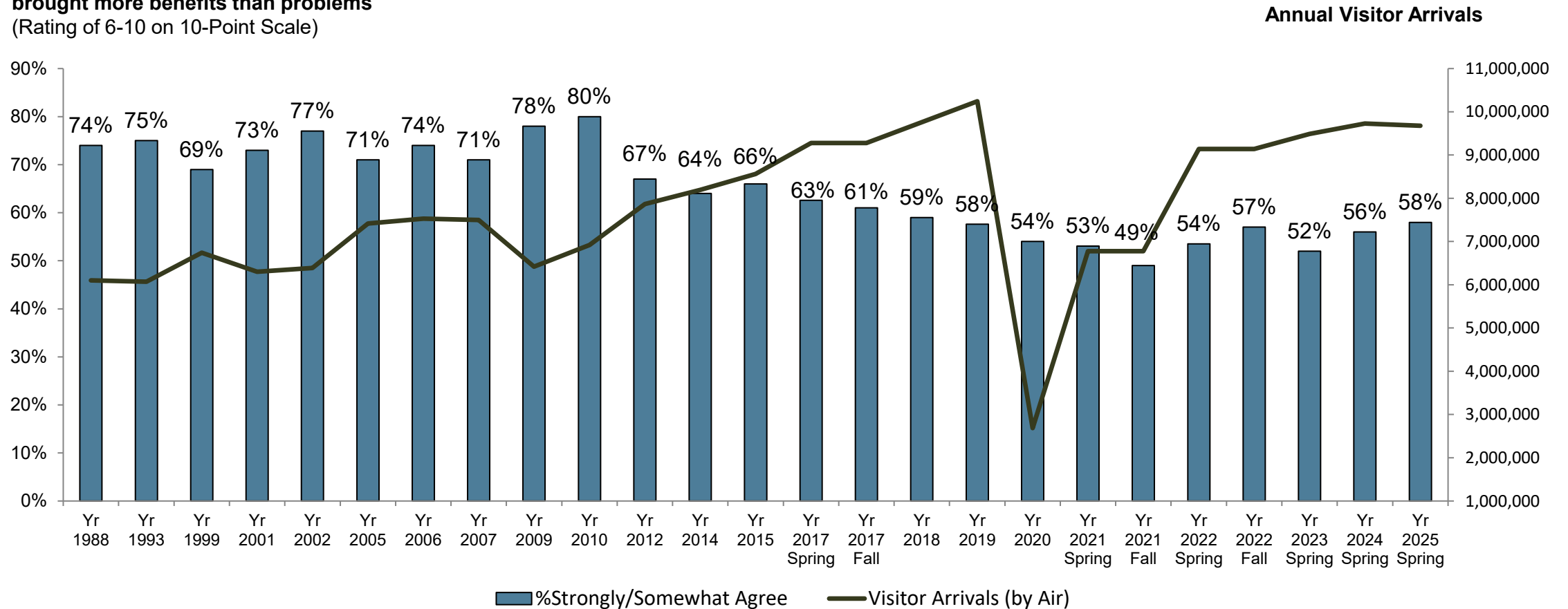
Executive Summary – Key Resident Sentiment Indicators

Impacted by the confluence of concerns over tourism’s slow recovery and improvements in destination stewardship areas, all four high-level key sentiment measures improved in 2025: Residents view tourism more favorably, believe it delivers greater statewide benefits, and feel a stronger positive impact on their own households. Collectively, this builds on the view that tourism creates “more benefits than problems.”



Executive Summary – Historic Data “Tourism has brought more benefits than problems”

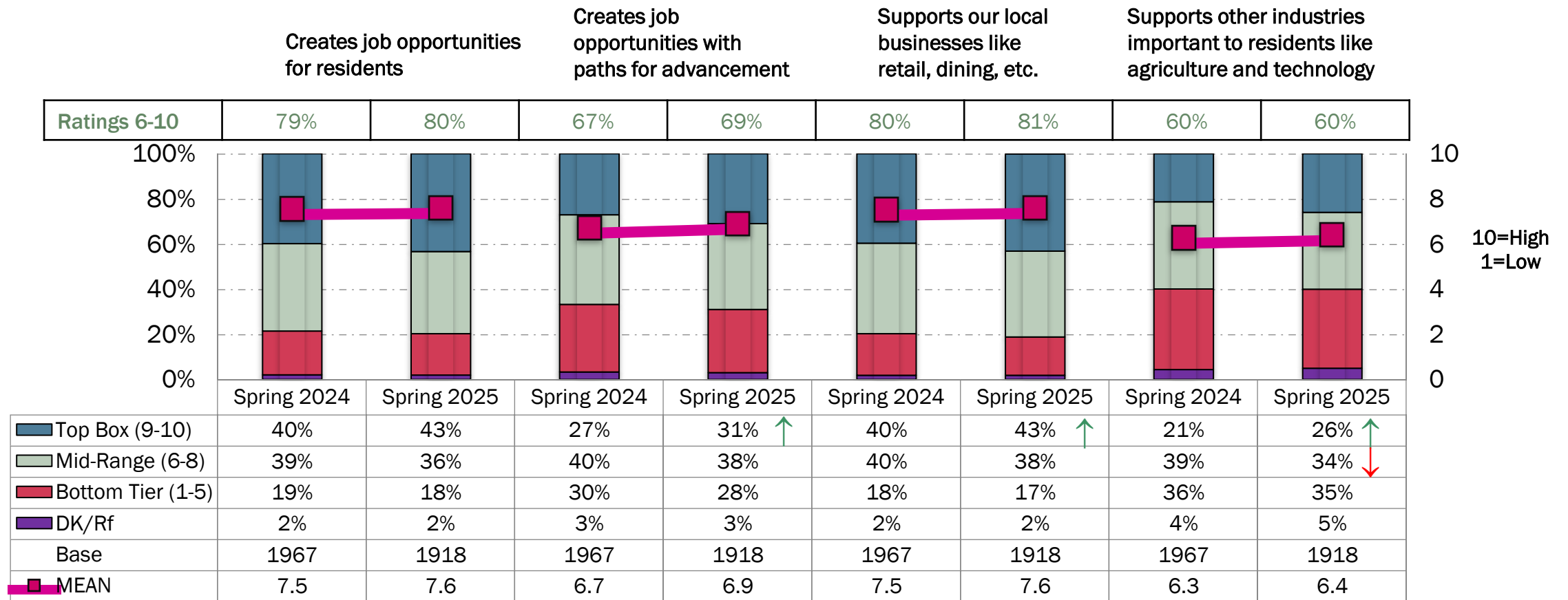
% strongly/somewhat agree tourism has brought more benefits than problems
(Rating of 6-10 on 10-Point Scale)



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

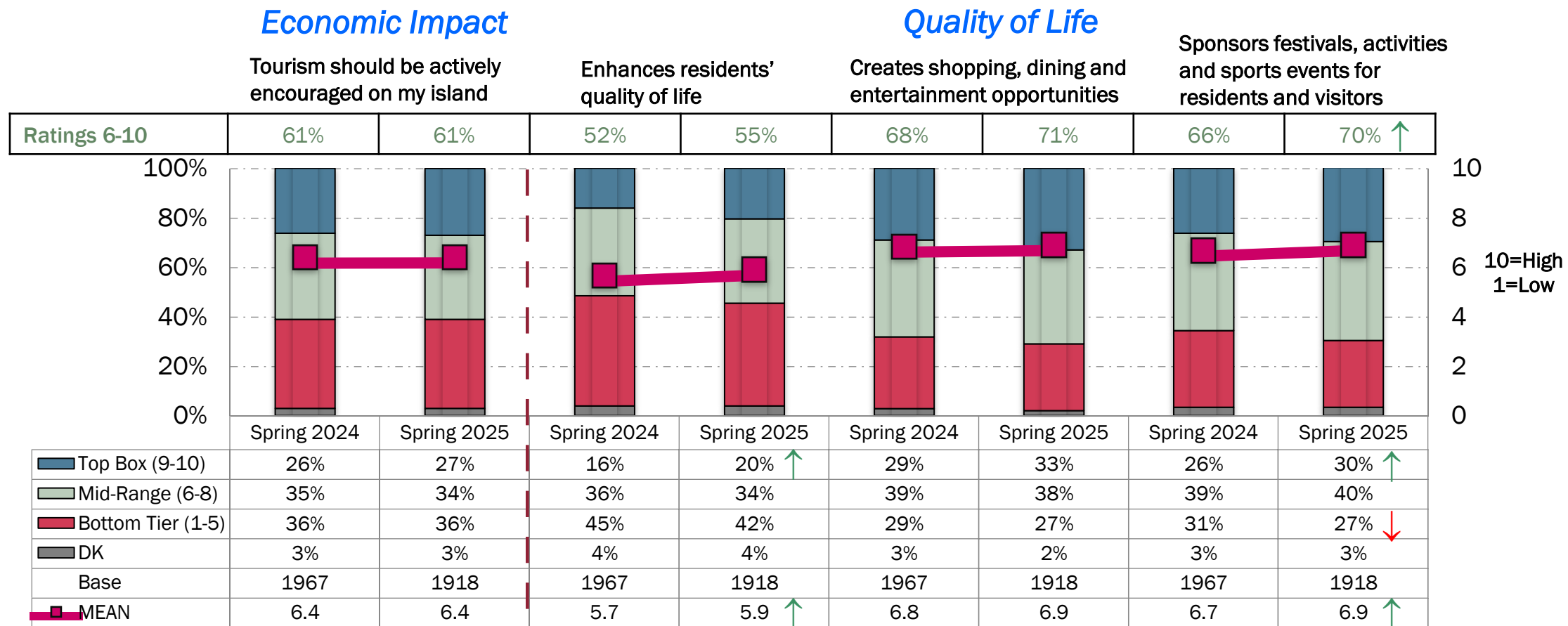
Perceptions of tourism as a strong economic driver continues to boost resident sentiment toward the industry, with more people in 2025 recognizing its role in creating jobs, advancing careers, and supporting local businesses like shops and restaurants. Confidence is also growing, though at a slower pace, that tourism can boost other sectors such as agriculture and technology.



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

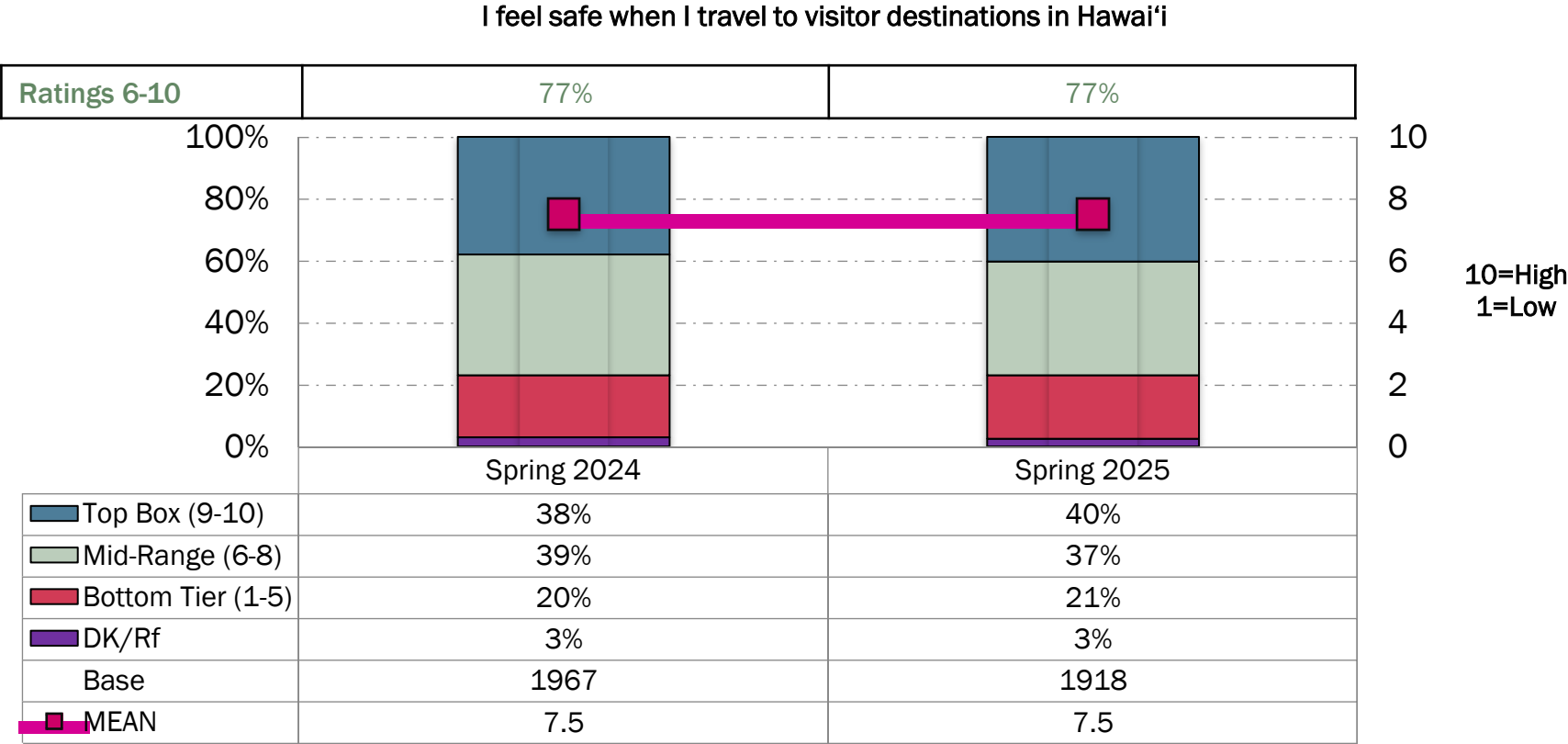
Public support for actively encouraging tourism held steady, while perceptions of quality-of-life benefits are rising: More residents now say tourism broadens shopping and dining choices, and sponsors community festivals, events, and sports. These visible lifestyle perks are boosting sentiment even as enthusiasm for further growth holds steady.



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

Executive Summary – Safety and Security

Perceptions of safety and security also impact residents’ quality of life, and most residents continue to feel safe at Hawai‘i visitor destinations. Confidence remains high with slightly more people now describing these areas as “extremely safe,” indicating that overall comfort levels have stabilized at a strong level.

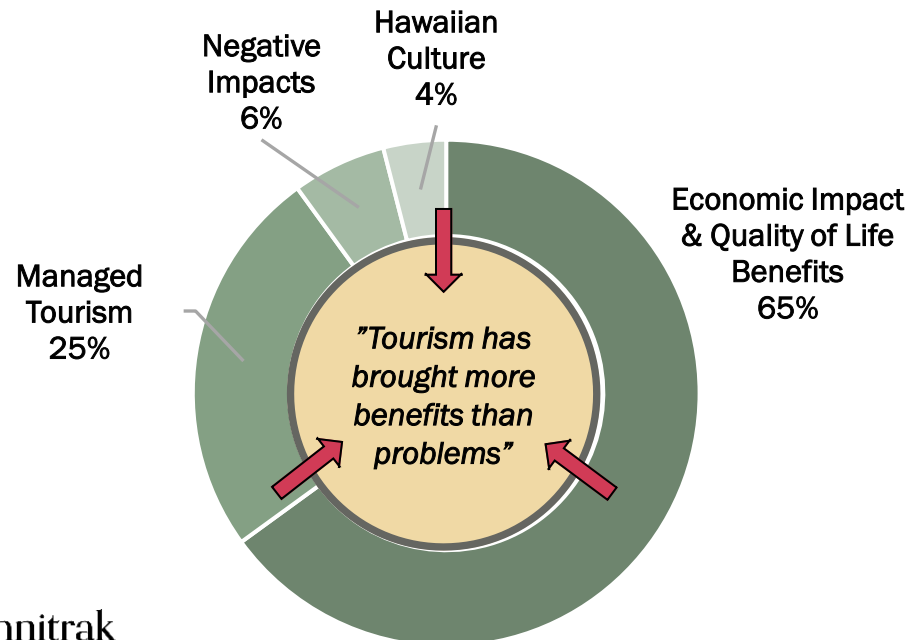


Q.4. I’m going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Executive Summary: Drivers of Resident Sentiment

To strengthen resident sentiment, destination development should focus on the *Economic and Quality of Life Benefits of tourism* and *Managed Tourism* efforts, which are the primary “drivers” influencing resident attitudes. Within the overall drivers, the individual attributes with the most weight are:

- Creates job opportunities for residents: 18%
- I have a voice in my island’s tourism development decisions: 17%
- Supports local businesses: 10%
- Creates shopping, restaurants and entertainment opportunities for residents: 9%

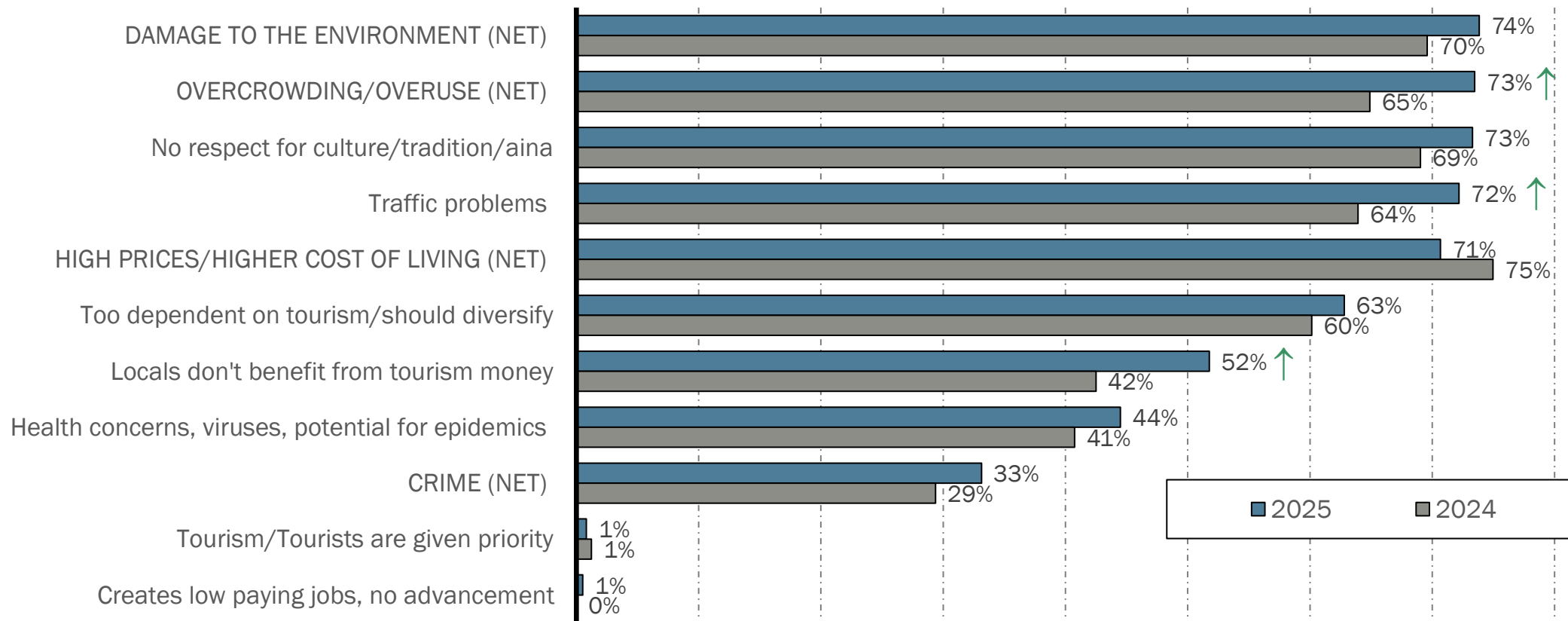


Drivers (Driver Weight)	Attribute	Attribute Weights
Economic and Quality of Life Benefits (65%)	Creates job opportunities for residents	18%
	Supports local businesses	10%
	Creates shopping, restaurants and entertainment opportunities for residents	9%
	Supports festivals, activities and sports events for residents and visitors	6%
	Tourism is being better managed on my island	6%
	Creates jobs opportunities with paths for advancement	5%
	Should be actively encouraged on my island	4%
	More effort is being made to balance economic benefits of tourism and quality of life for residents	3%
	I feel safe when I travel to visitor destinations in Hawai'i	2%
	Helps fund the stewardship of Hawai'i's natural resources, parks and cultural sites	1%
	Is an industry that enhances residents' quality of life	1%
	Supports other industries like agriculture and technology	0%
Managed Tourism (25%)	I have a voice in my island's tourism development decisions	17%
	Contributes to the perpetuation of Native Hawaiian culture and language	6%
Negative Impacts (6%)	Contributes to improvement and maintenance of natural resources in my community	2%
	My island's economy is too dependent on tourism	4%
Hawaiian Culture (4%)	This island is being run for tourists at the expense of local people	2%
	Authentic presentation of Native Hawaiian language and culture	2%
	Educate visitors about protecting Hawai'i's natural environment and cultural resources	2%

Executive Summary - Problems Created by Tourism in Hawai'i (2024-2025)

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

Destination development efforts and improving resident sentiment also involve addressing perceived problems created by tourism. Among residents who say that the benefits of tourism do not outweigh the problems, the top perceived problems are *Damage to the environment* (74%), *Overcrowding/Overuse* (73%), *No respect for culture/tradition/‘āina* (73%) and *Traffic problems* (72%) – with each surpassing *High Prices* which previously topped the list in 2024.



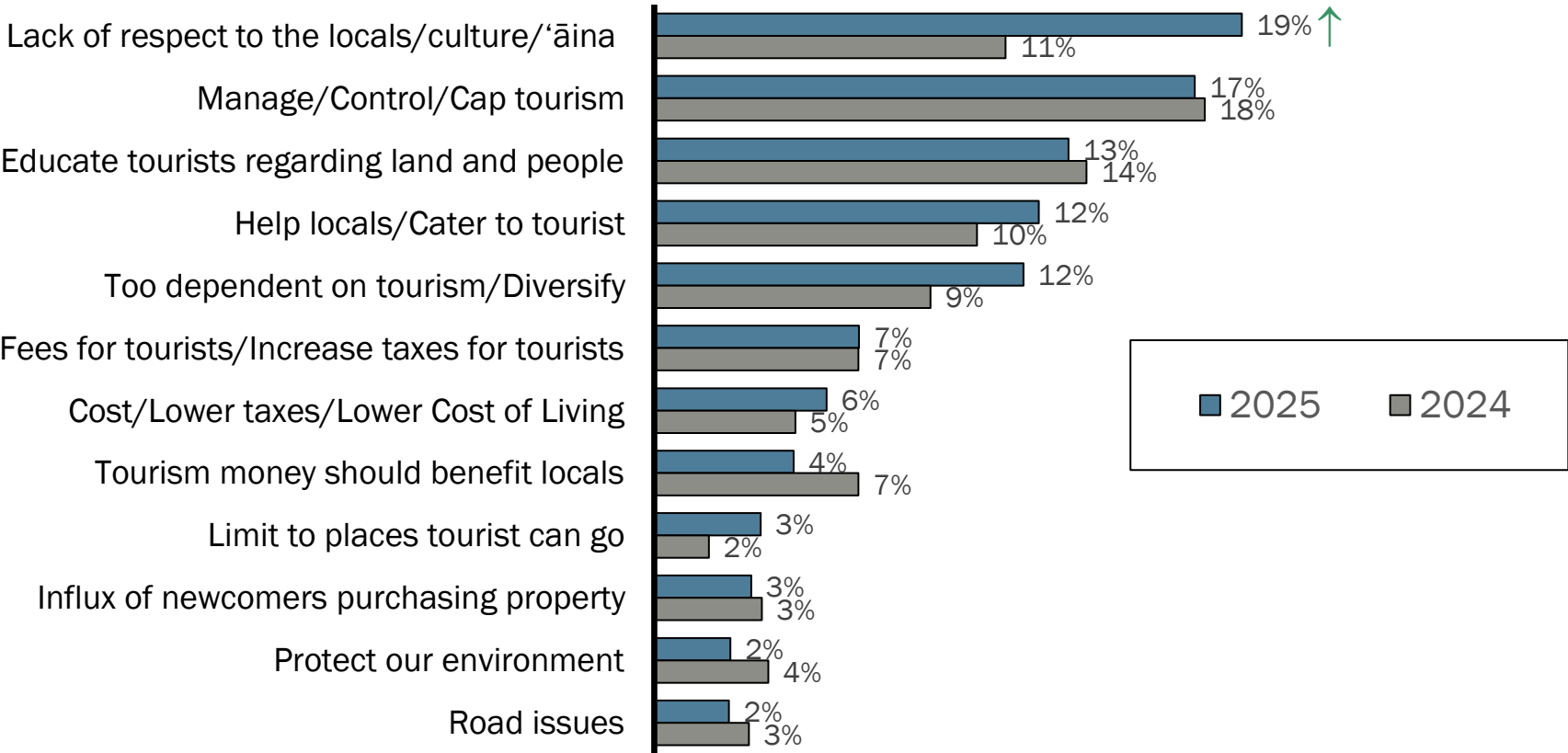
Base: Spring 2024 (821), Spring 2025 (776)

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

Executive Summary - Opportunities for Improving Opinion of Tourism (2024-2025)

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

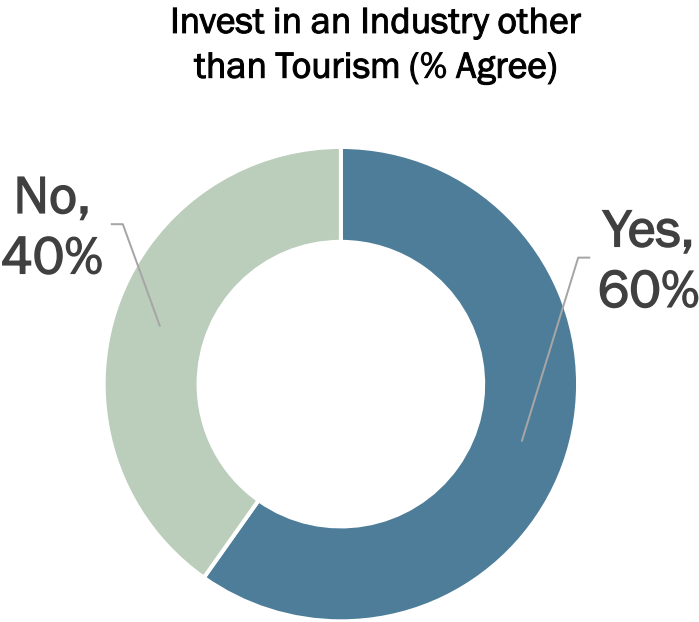
Among residents who did not express a favorable opinion of tourism in Hawai‘i, *Respect for the locals/culture/‘āina* (19%) surged upwards in 2025 to become the top recommended action cited for improving their opinions. *Managing/controlling/capping tourism* (17%) and *Educating tourists regarding the state’s land and its people* (13%) also remained among the top recommendations. A need for economic diversification (12%) continued to surface.



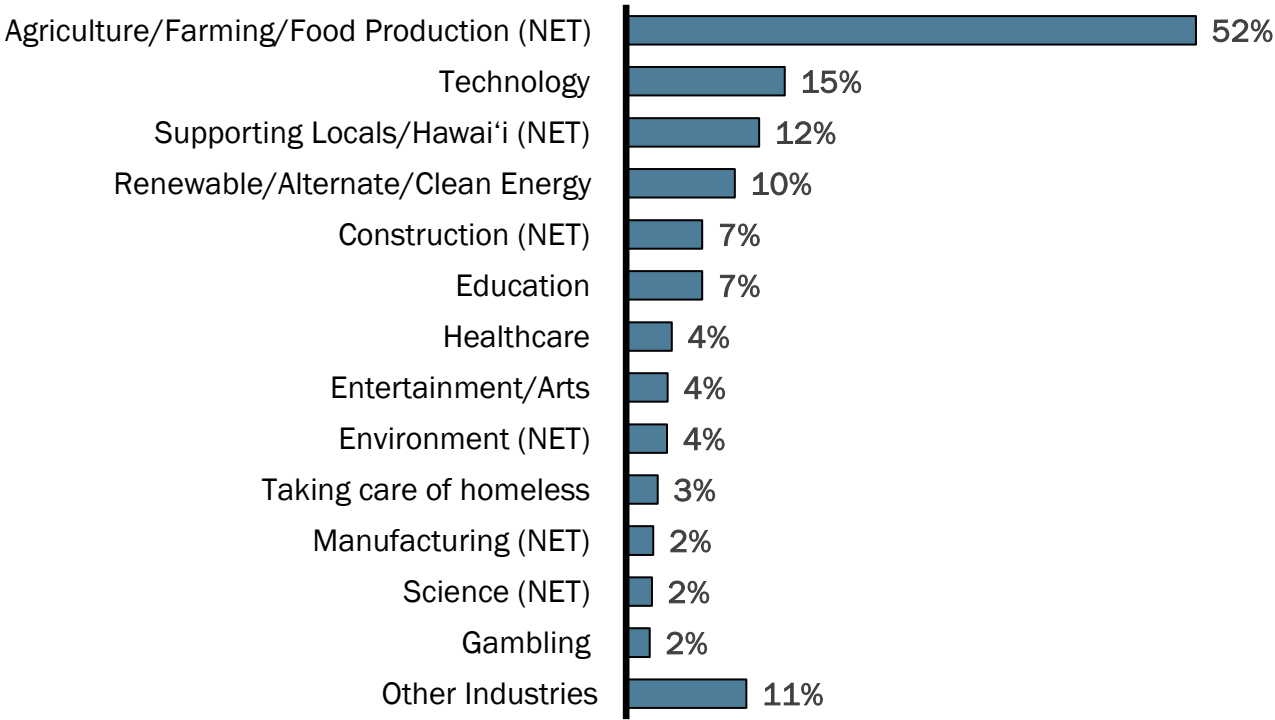
Base: Spring 2024 (579), Spring 2025 (532)
Q6a. You said that you do not have a favorable opinion of tourism. What would it take to improve your opinion? Anything else?

Executive Summary – Investing in other Industries for Hawai‘i

A desire for economic diversification was echoed among residents overall, whereby a solid 60 percent want Hawai‘i to channel resources into industries beyond tourism. Among those favoring new investments, most point to *Agriculture* (52%), followed distantly by *Technology* (15%), *General support for locals/Hawai‘i* (12%), and *Renewable/Alternate/Clean Energy* (10%).



What other Industries should Hawai‘i Invest in?



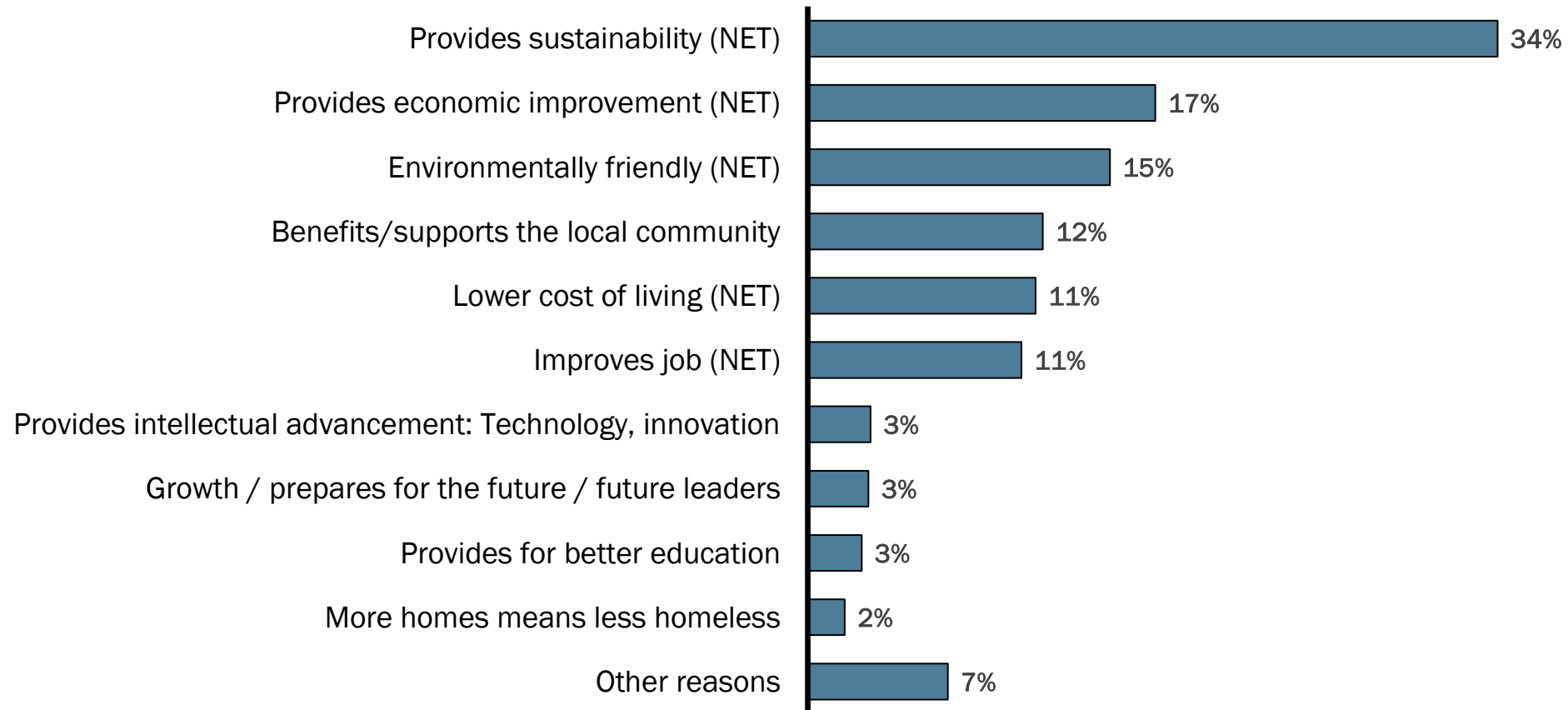
Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

Base: Spring 2025 (1194)

Q12A. In your opinion, you feel that there is another industry which Hawai‘i should be investing resources in. What would that other industry be? Any others?

Executive Summary – Factors for Investing in other Industries

When asked what draws them to an alternative industry, residents most often highlight its potential to support long-term sustainability and environmental stewardship. Many also see it as a new economic engine that can strengthen local communities, lower living costs, and create quality jobs.



Base: Spring 2025 (1191)
Q12B. What do you find most appealing about this industry?

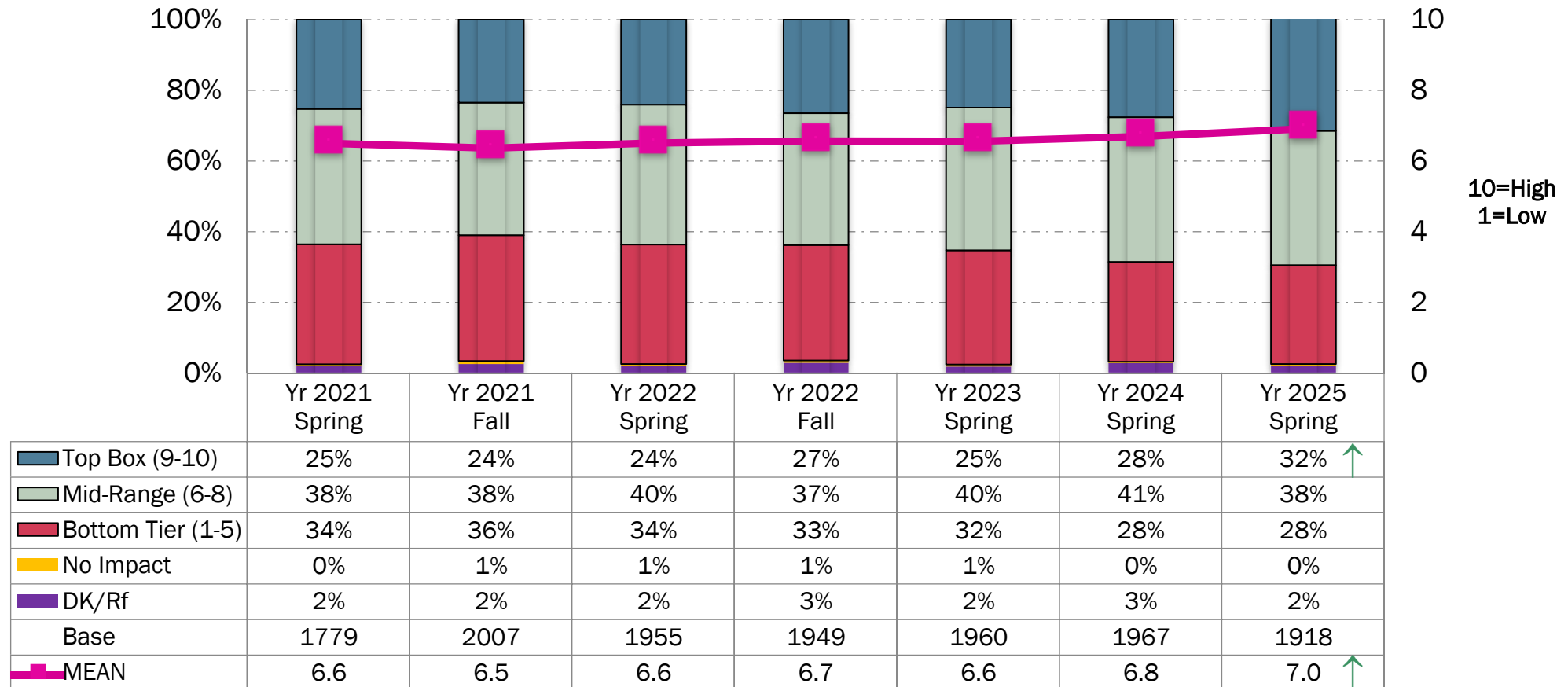
Detailed Findings



Impact of the Visitor Industry

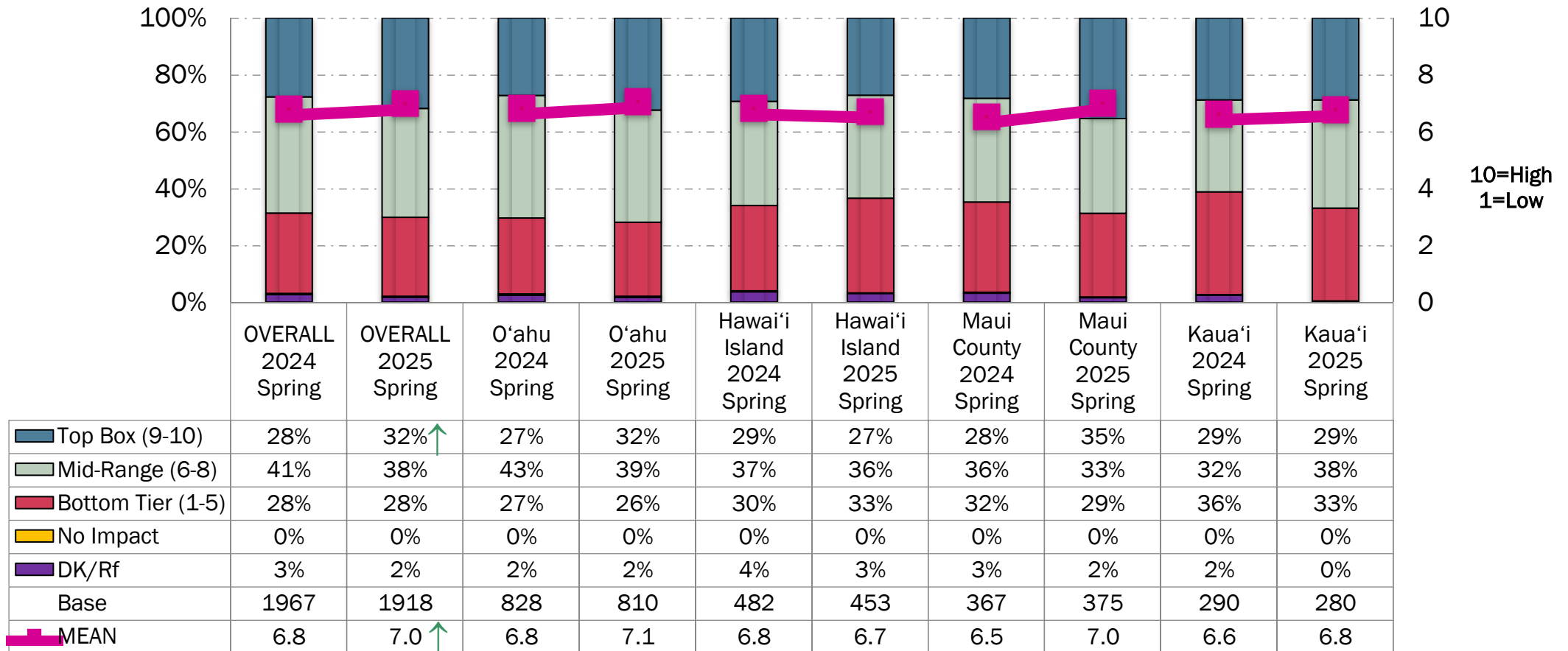


Impact of Tourism on the State – Overall



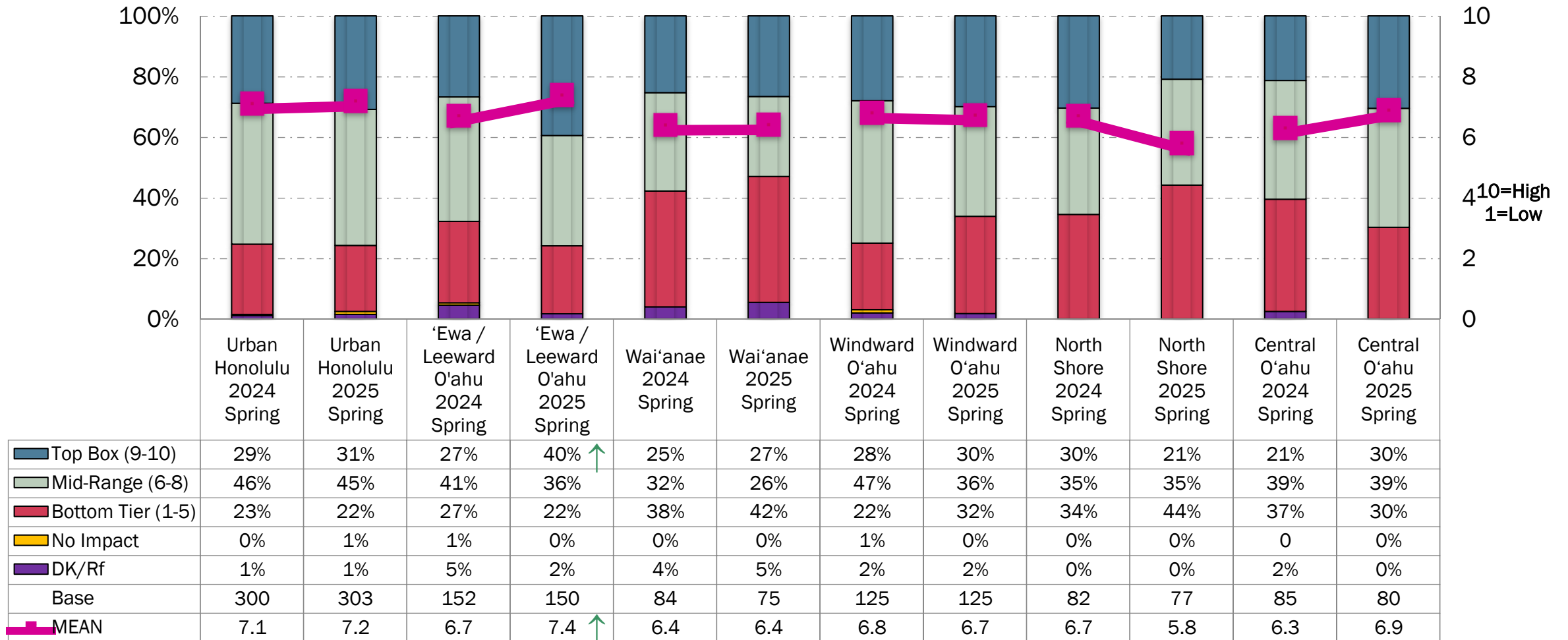
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By County*



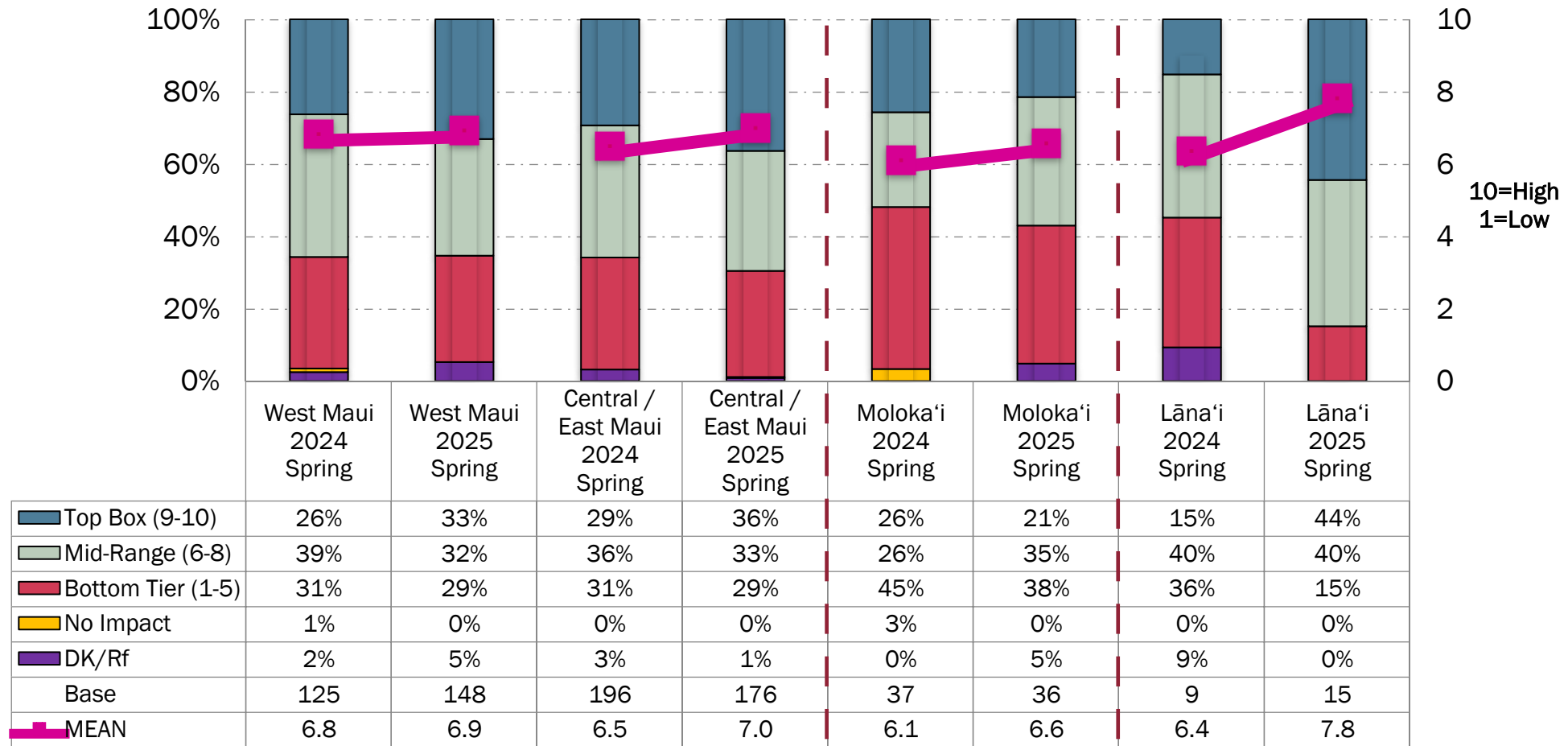
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



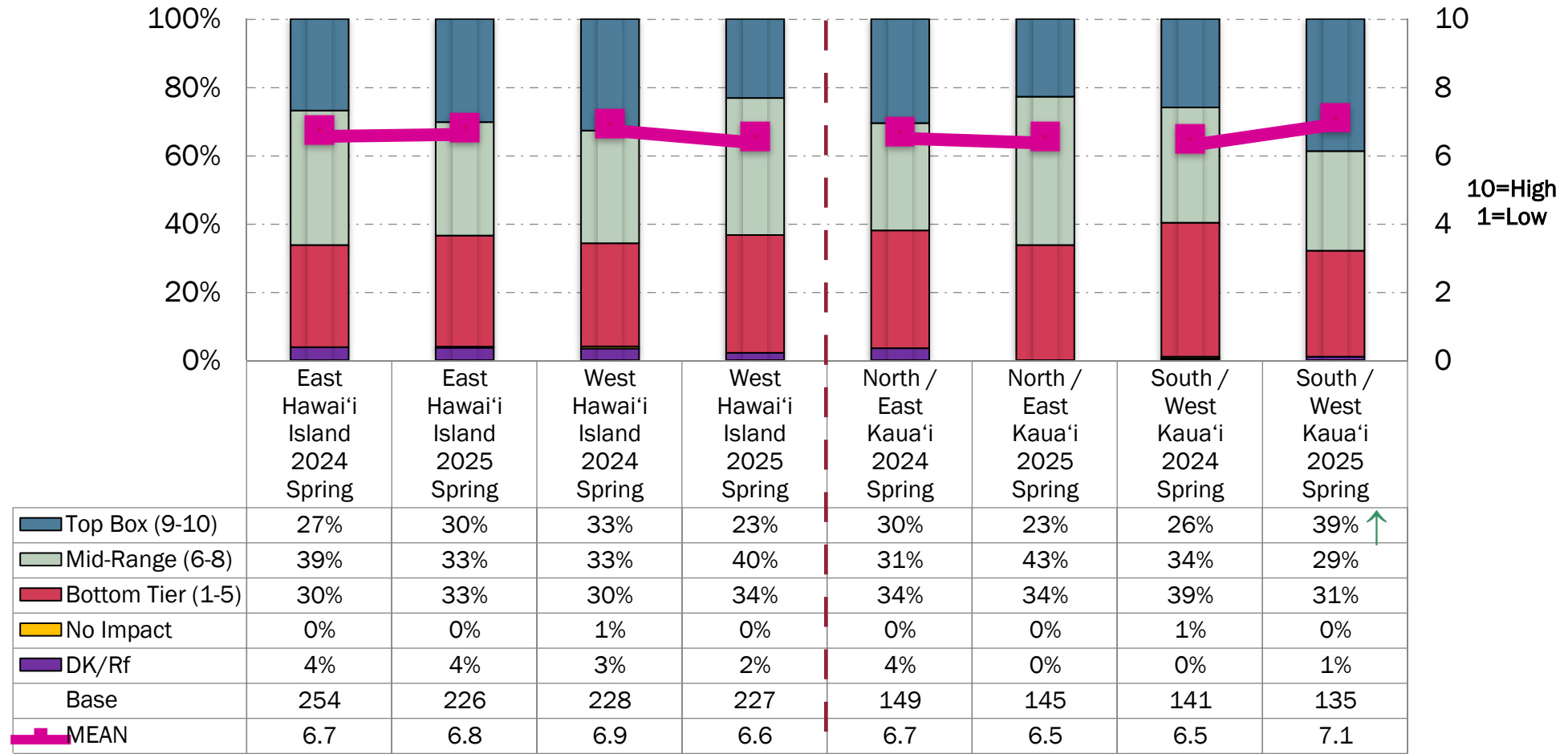
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



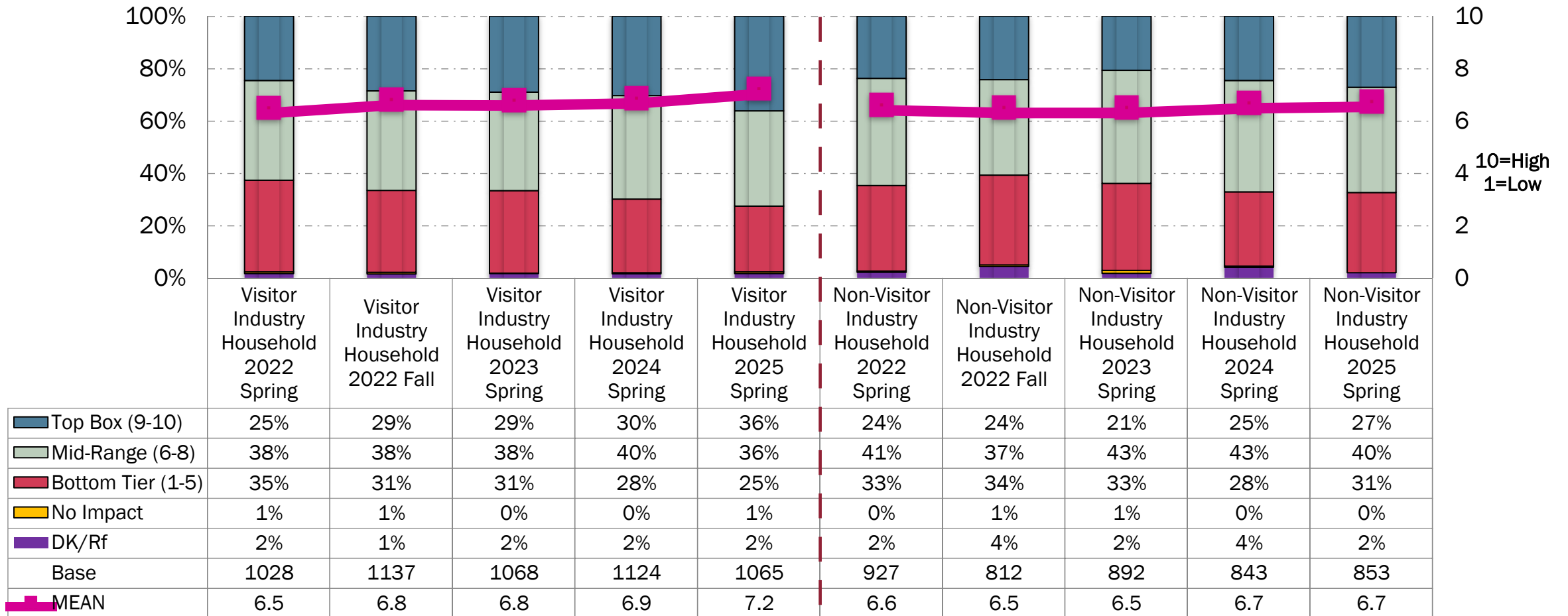
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



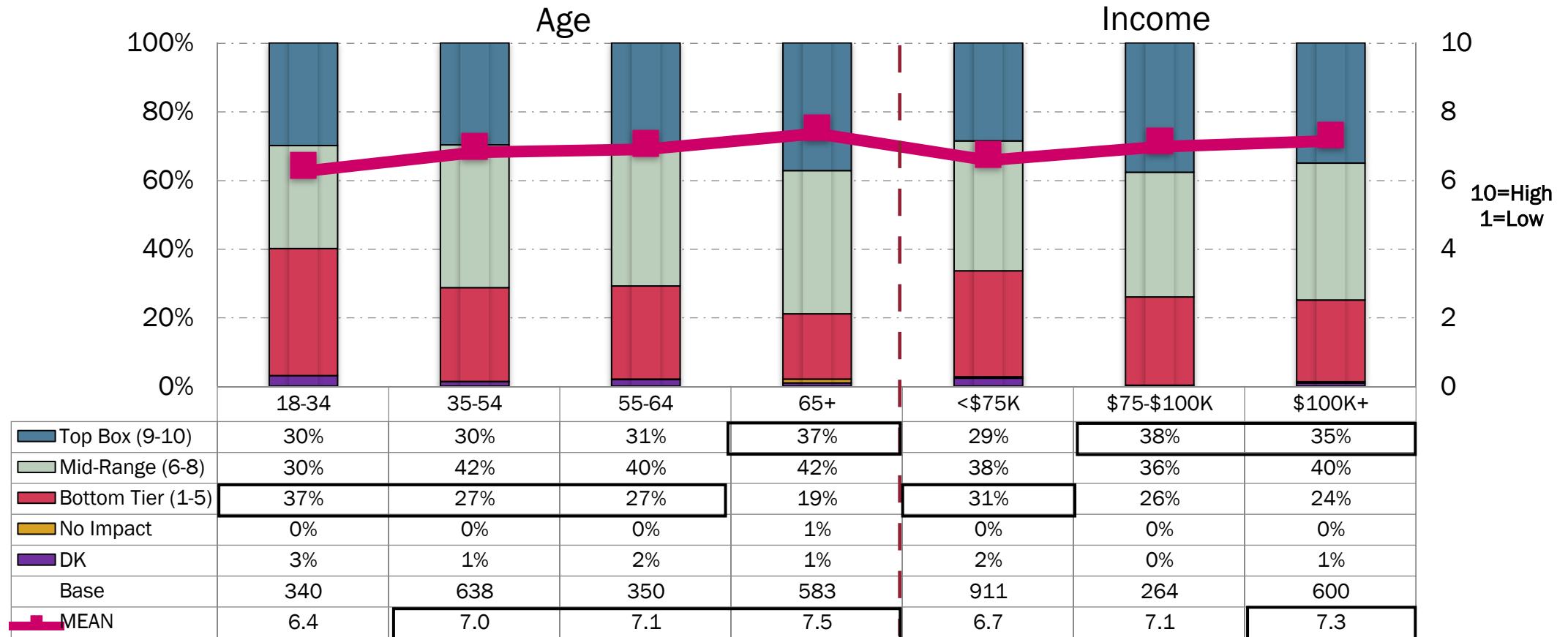
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

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



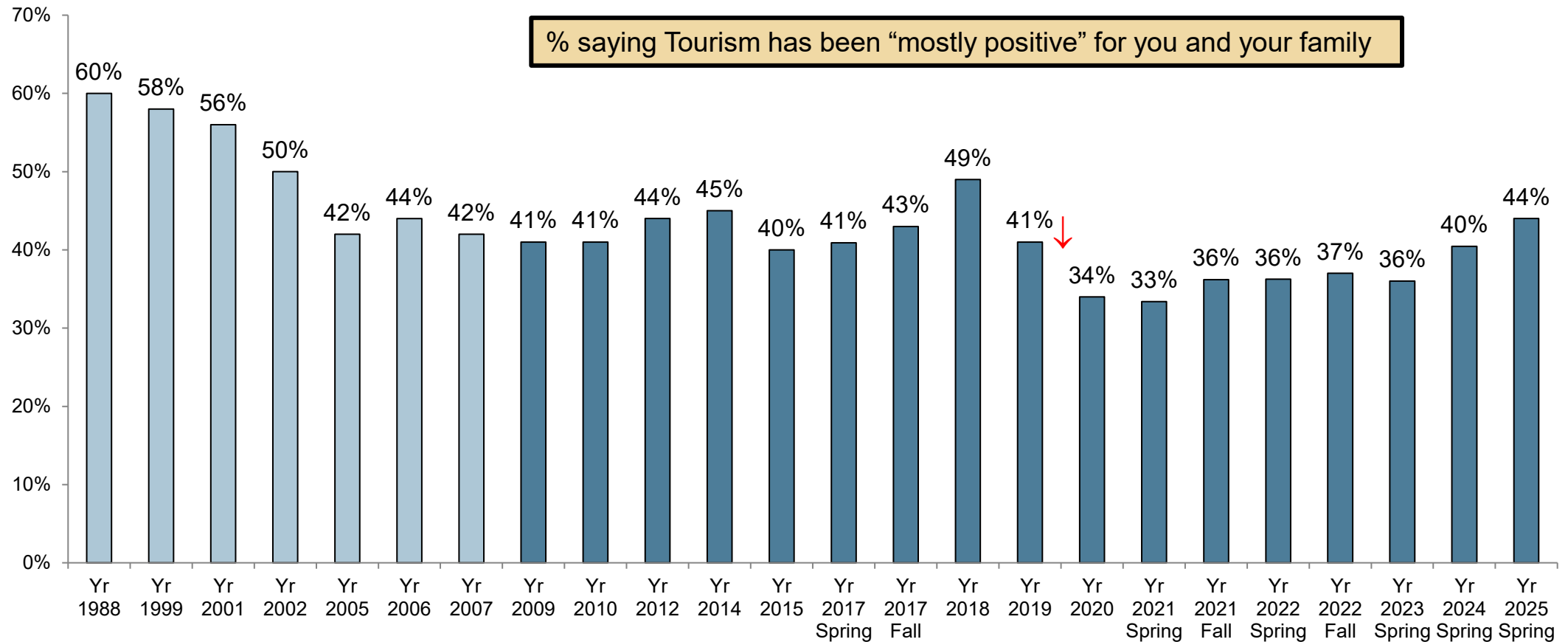
Q2a. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Demographics*



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

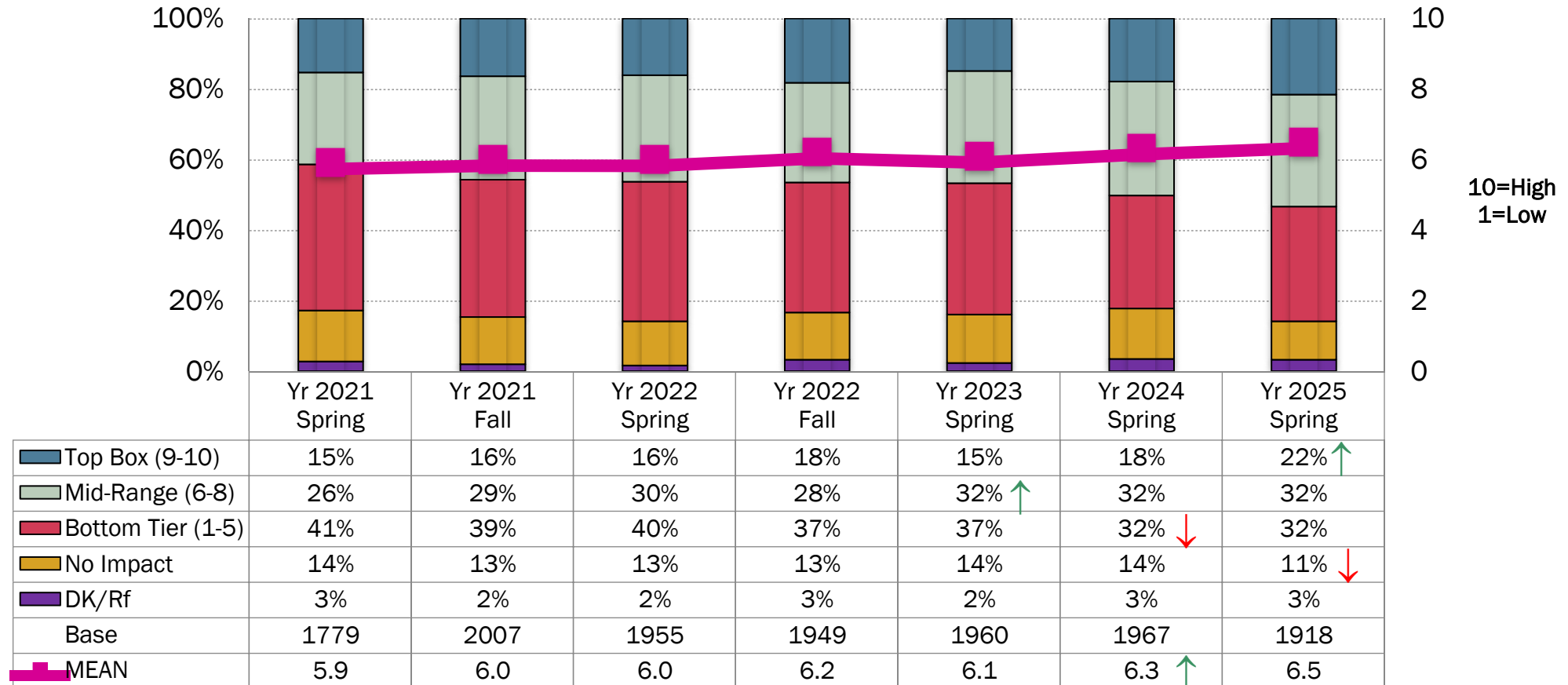
Impact of Tourism on You and Your Family – *Overall Trend*



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.

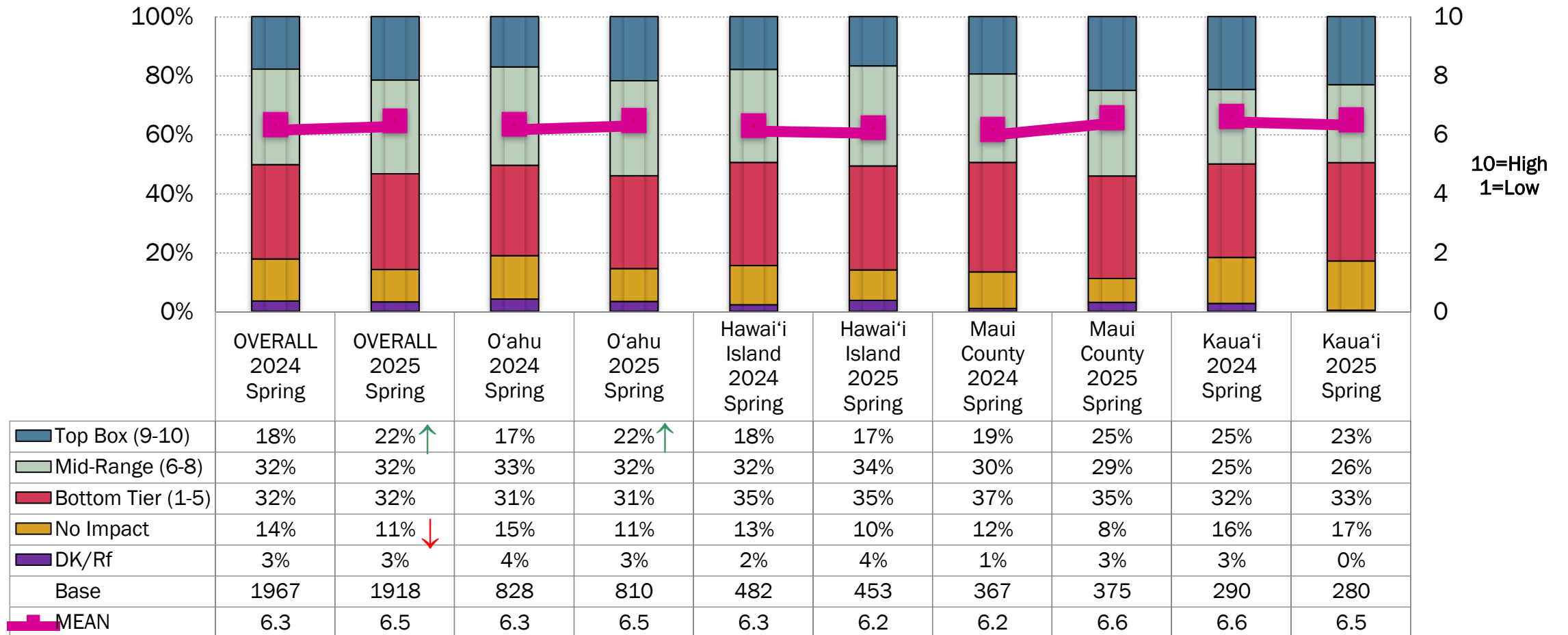
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You and Your Family – Overall



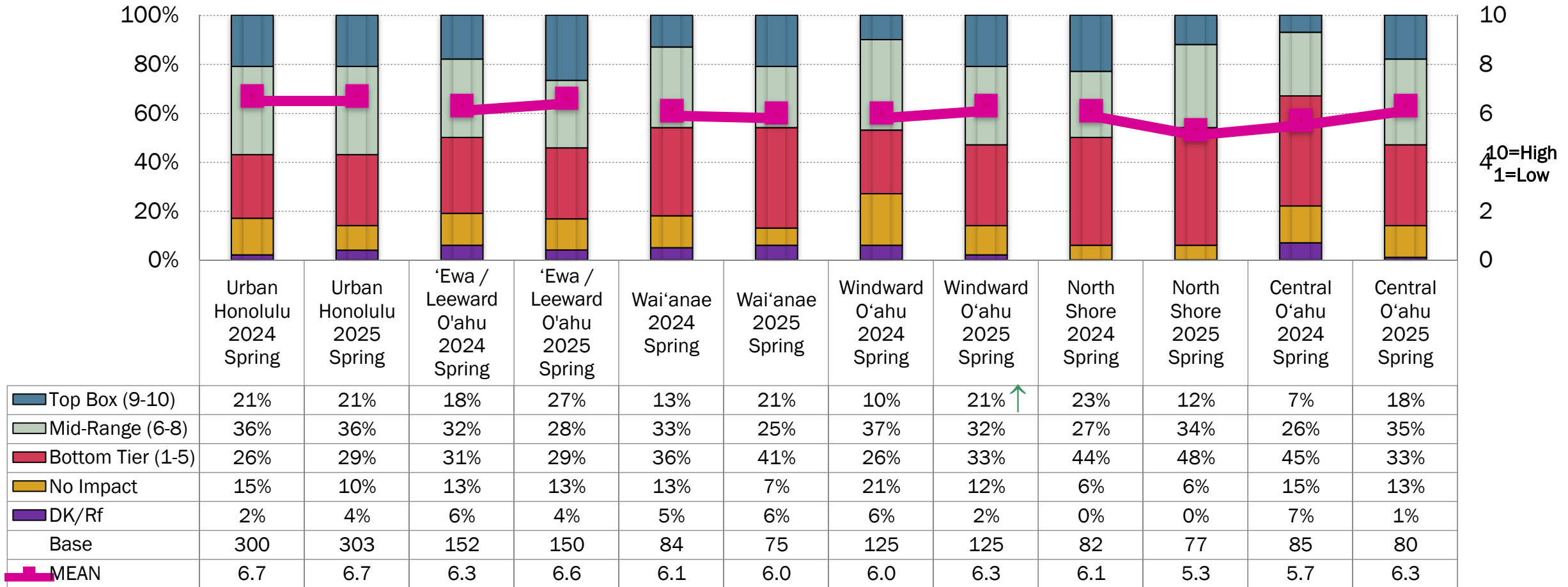
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



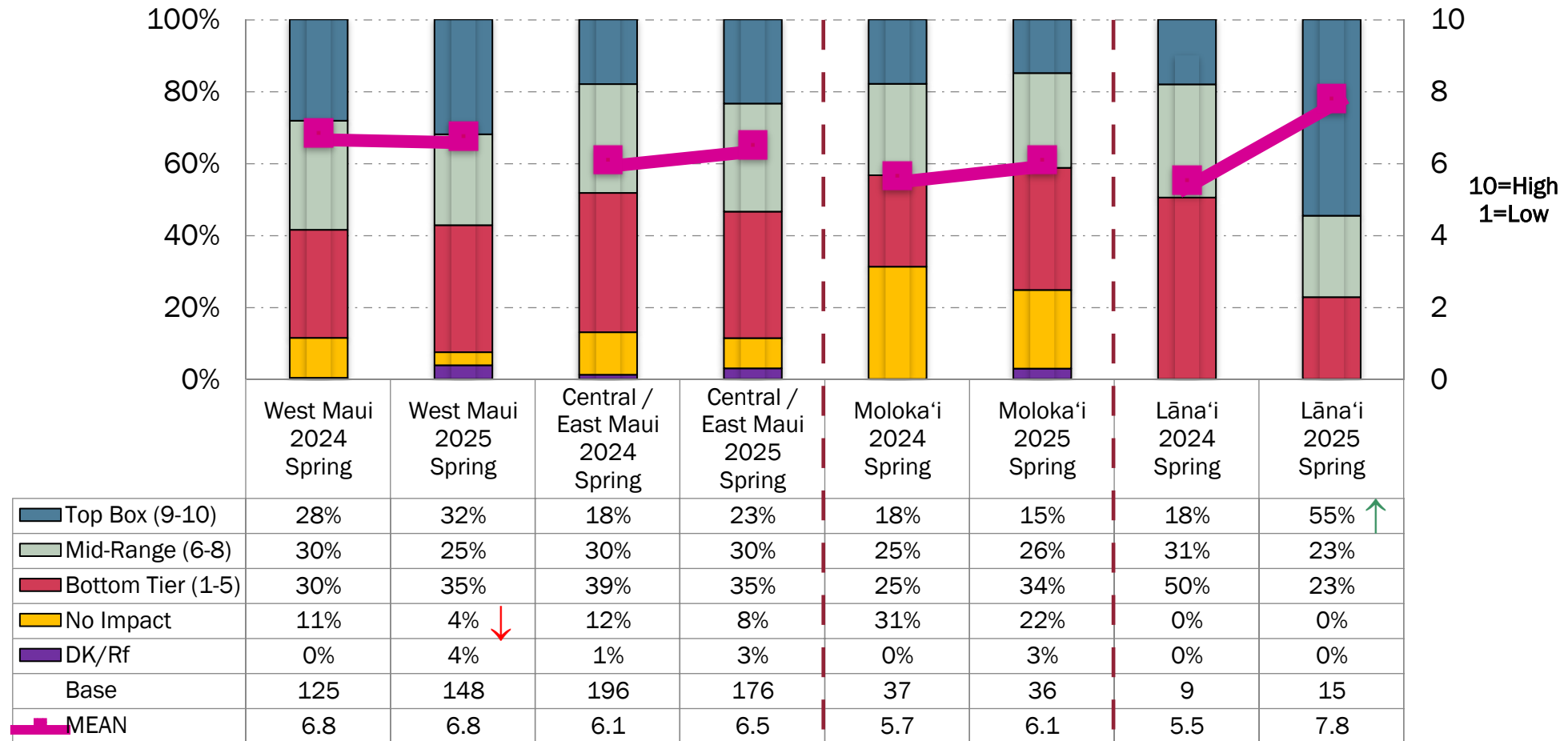
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



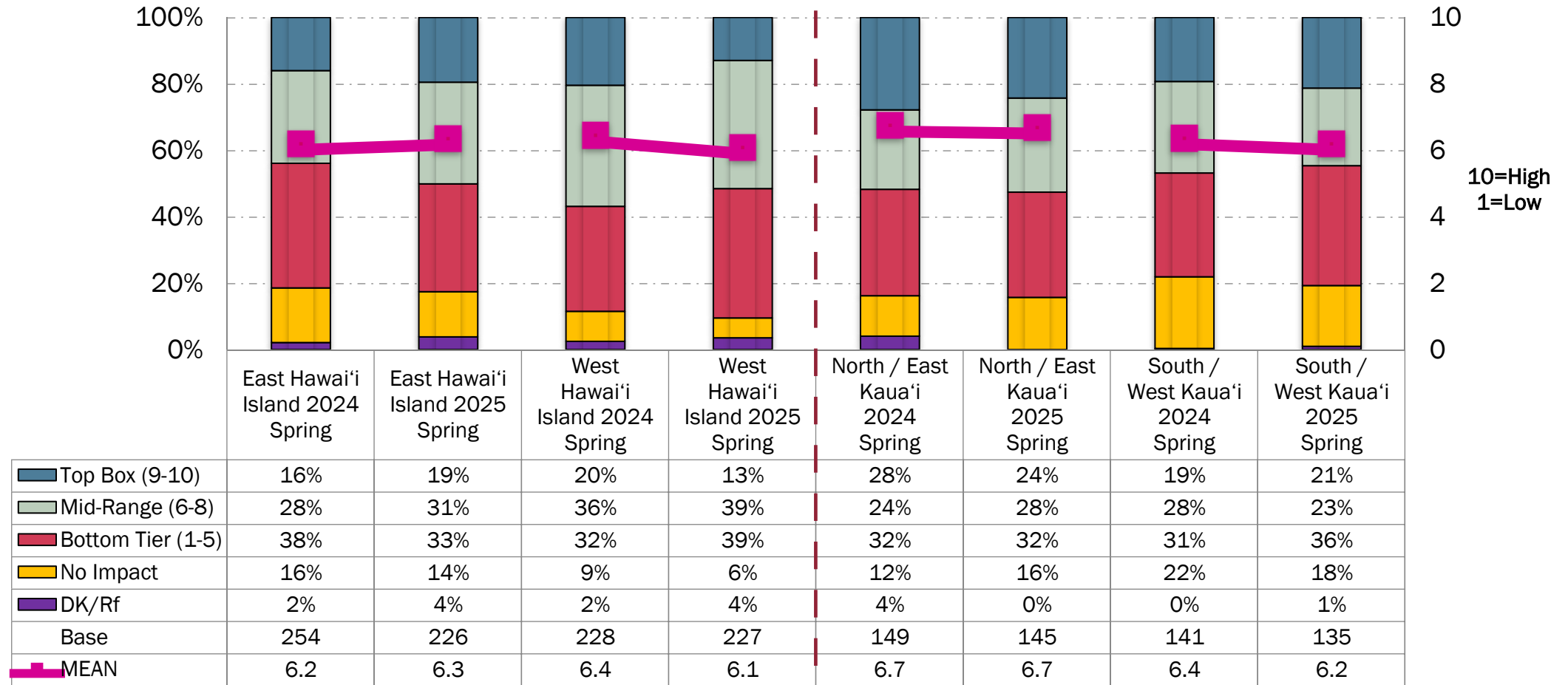
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



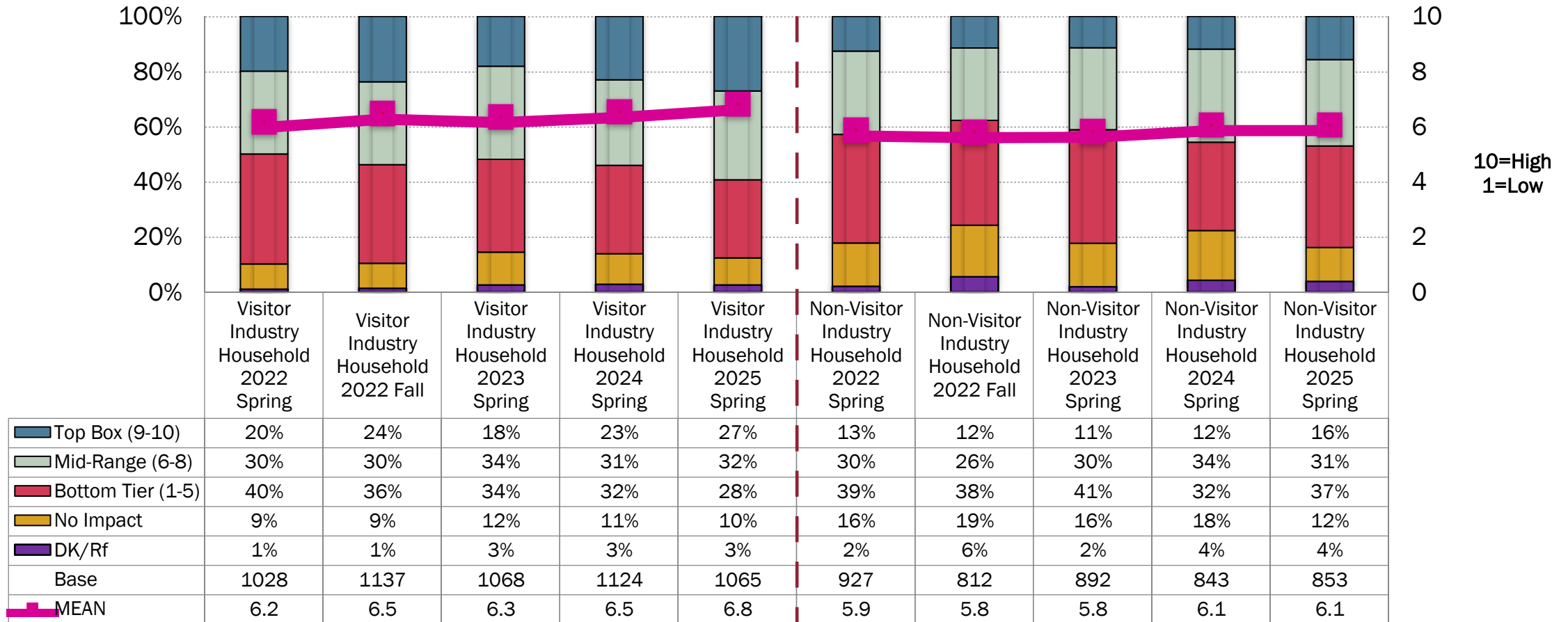
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



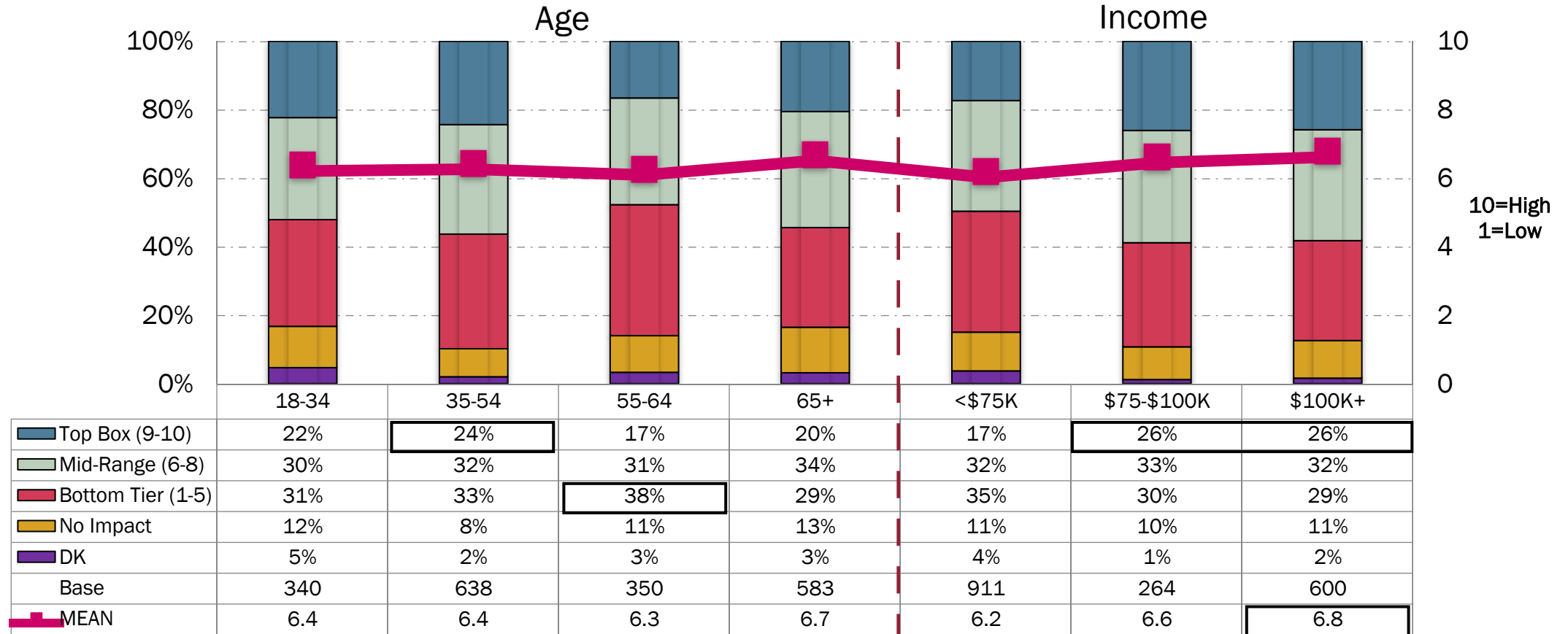
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You and 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?

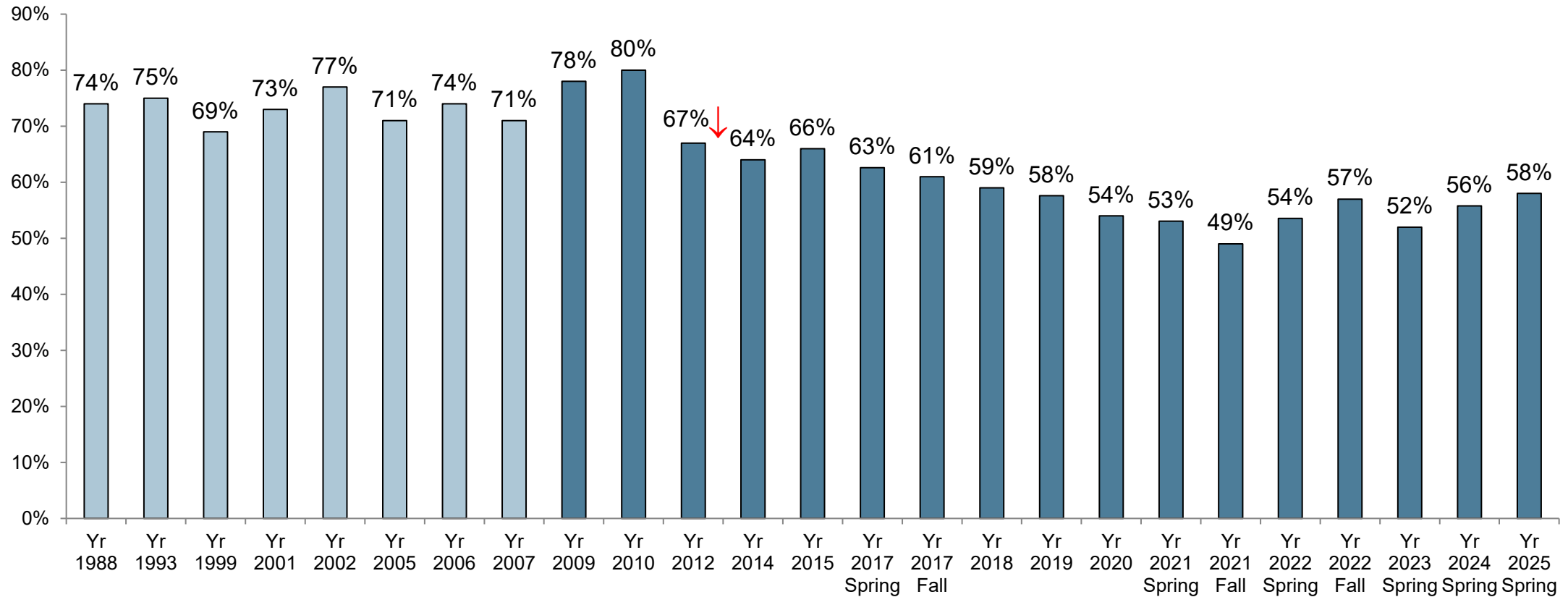
Impact of Tourism on You and Your Family - *By Demographics*



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*

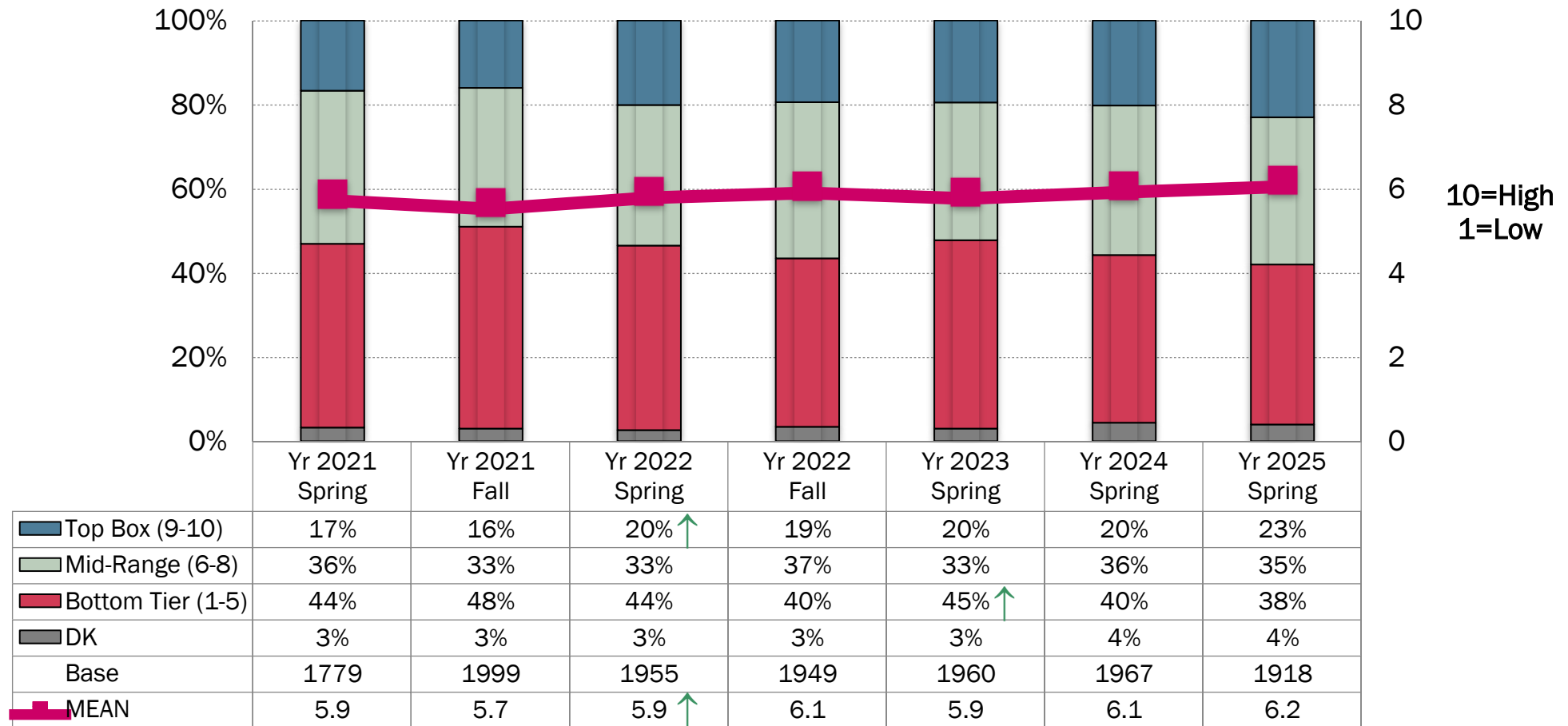
% strongly/ somewhat agree tourism has brought more benefits than problems



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.

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

“Tourism has brought more benefits than problems” – Overall



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

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



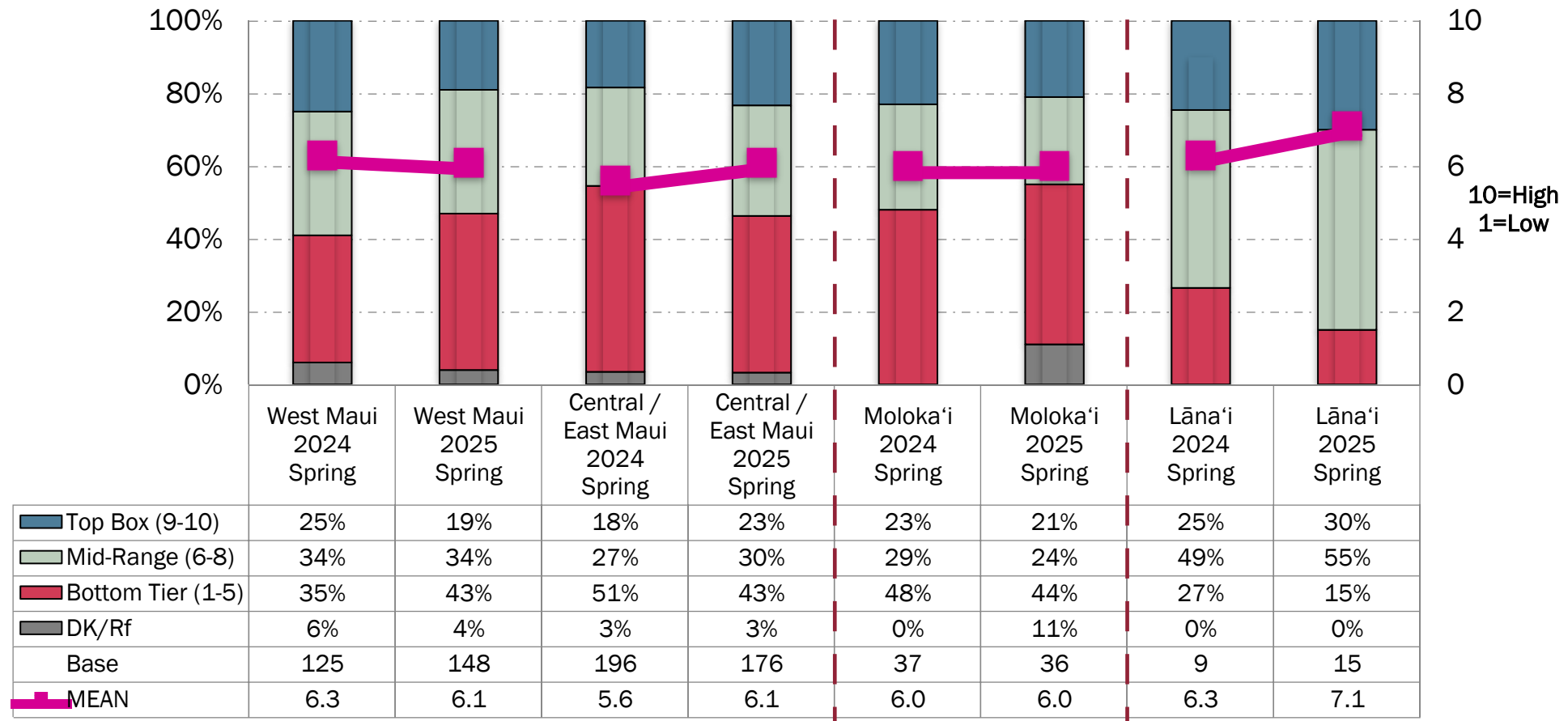
Q4.10. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



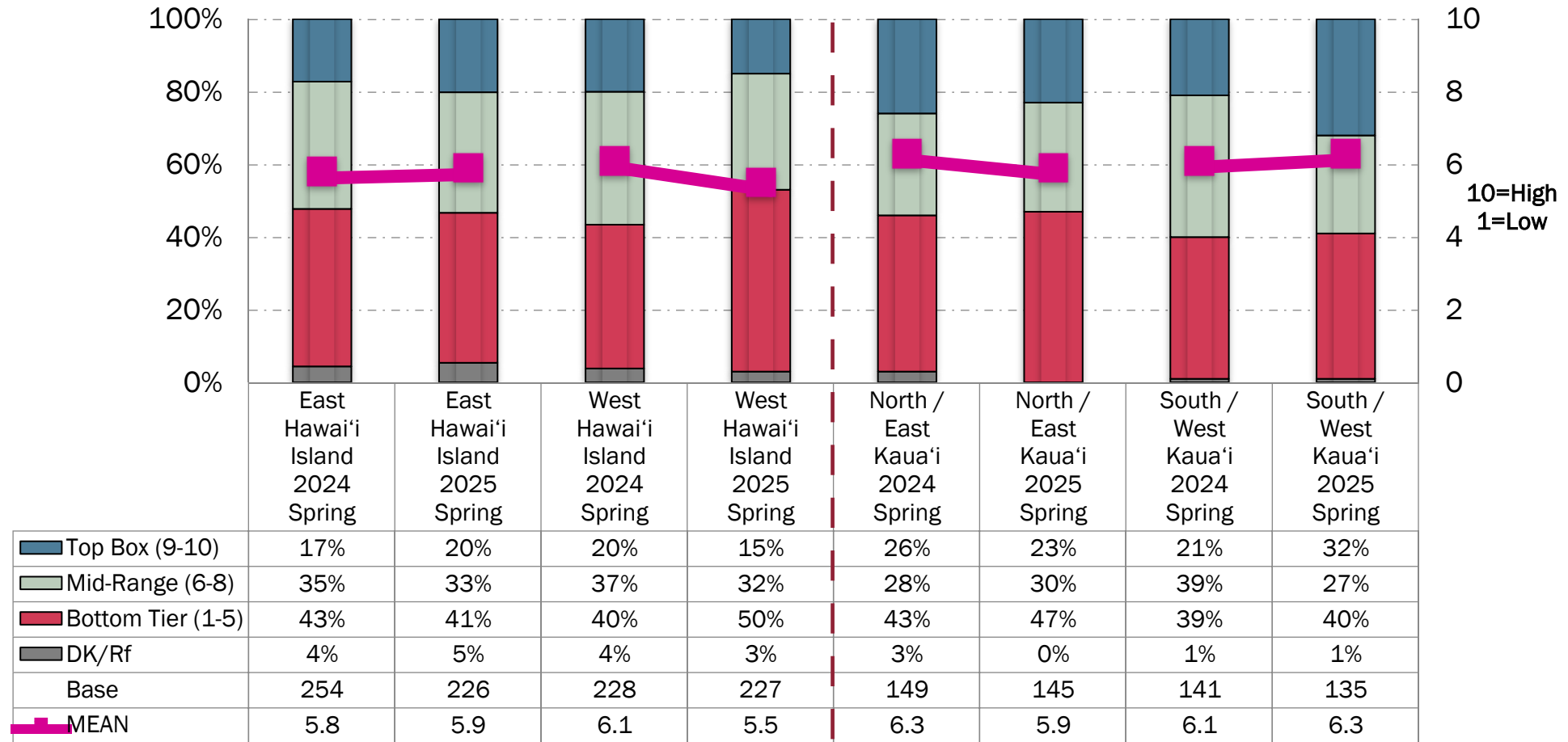
Q4.10. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



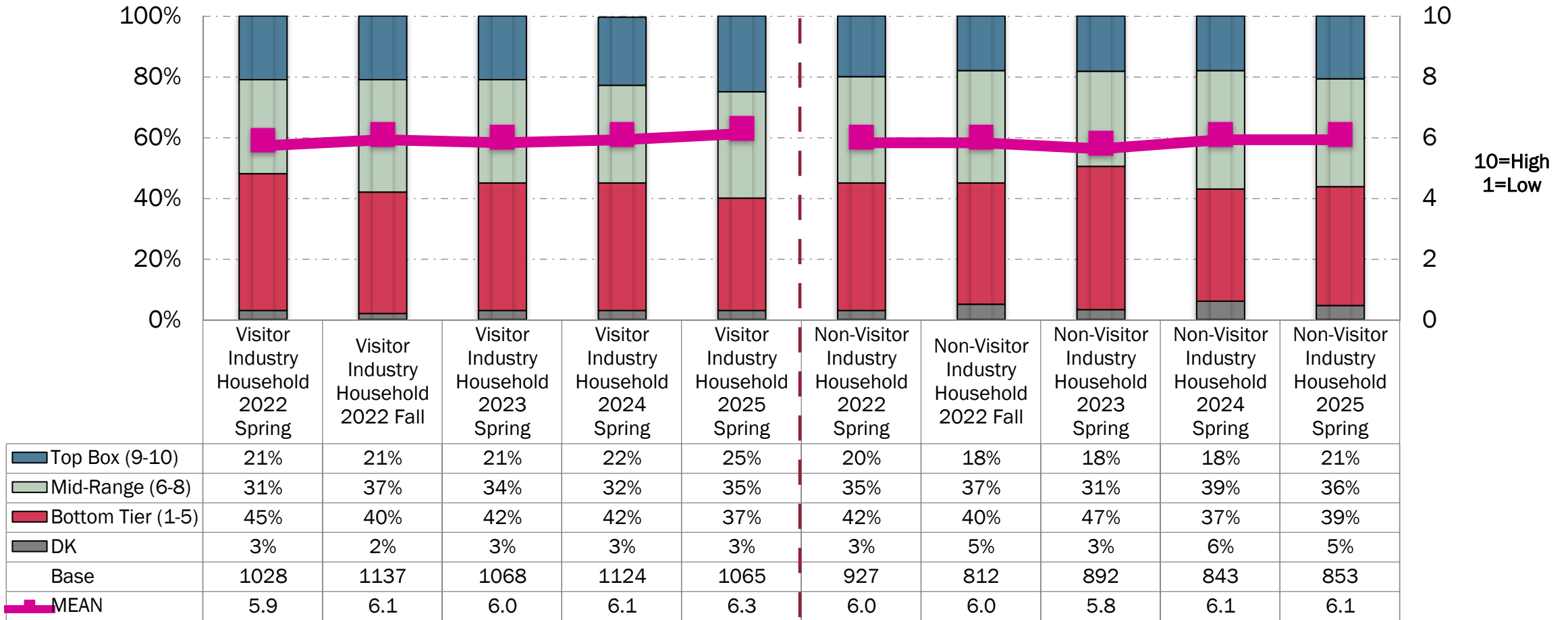
Q4.10. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



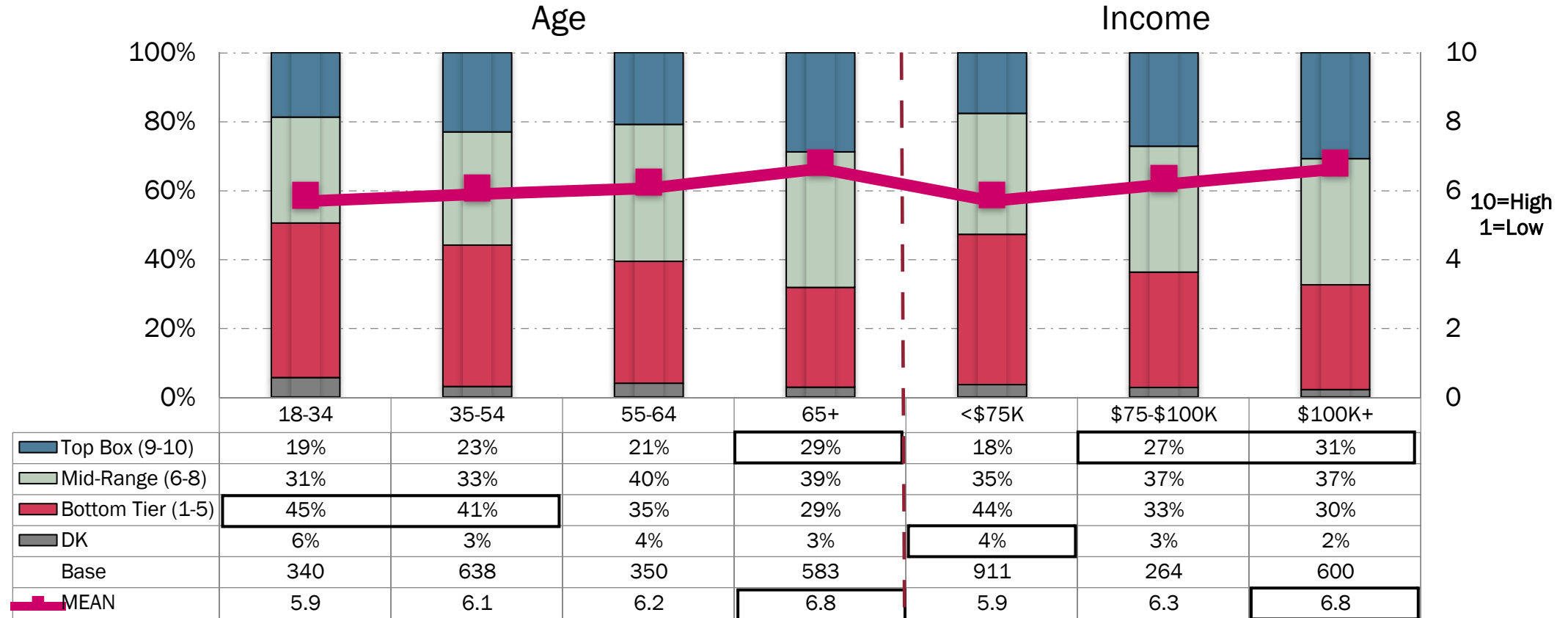
Q4.10. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.10. 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...?

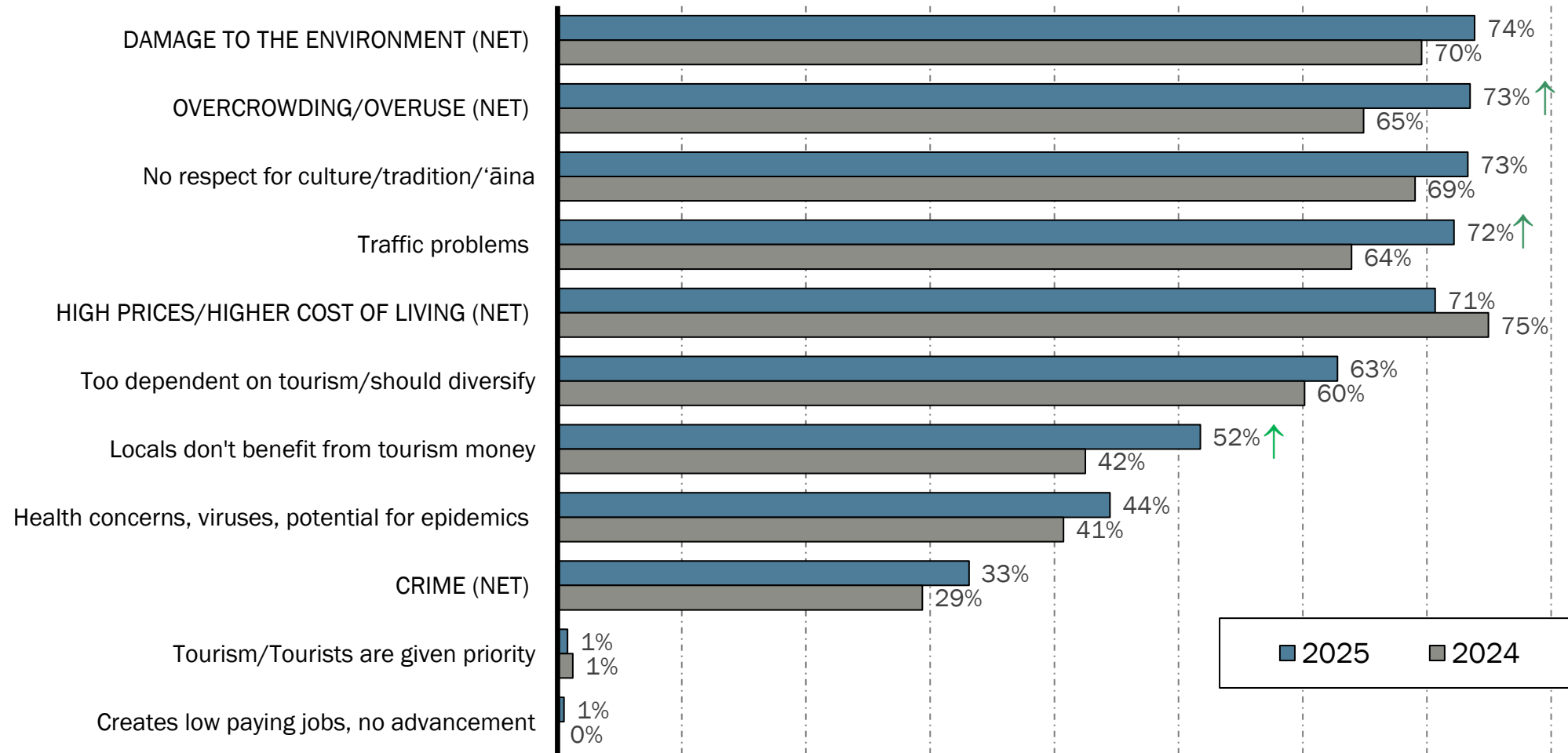
“Tourism has brought more benefits than problems” – *By Demographics*



Q4.10. 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...?

Problems Created by Tourism in Hawai'i (Trends 2024-2025)

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

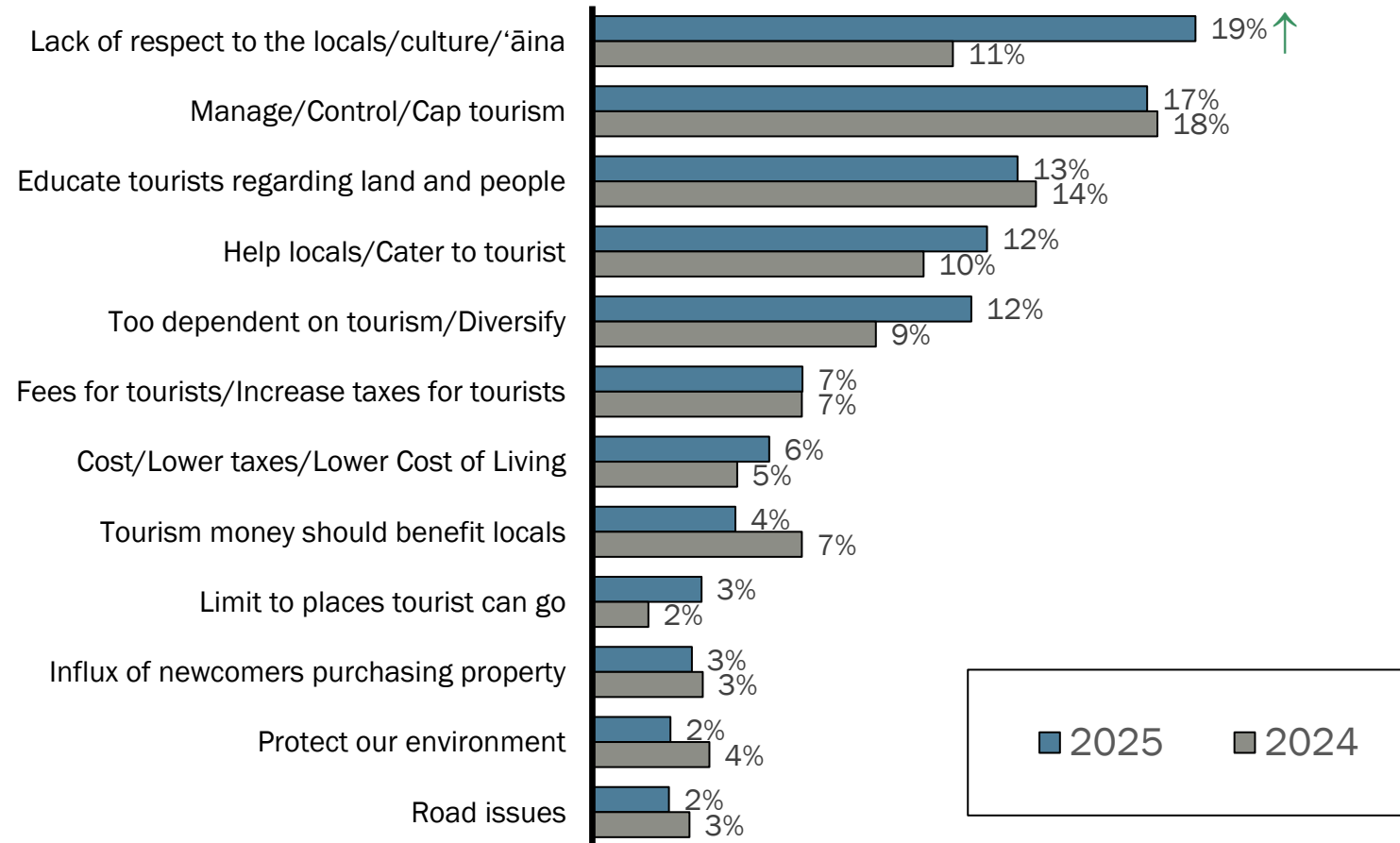


Base: Spring 2024 (821), Spring 2025 (776)

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

Opportunities for Improving Opinion of Tourism (Spring 2024-2025)

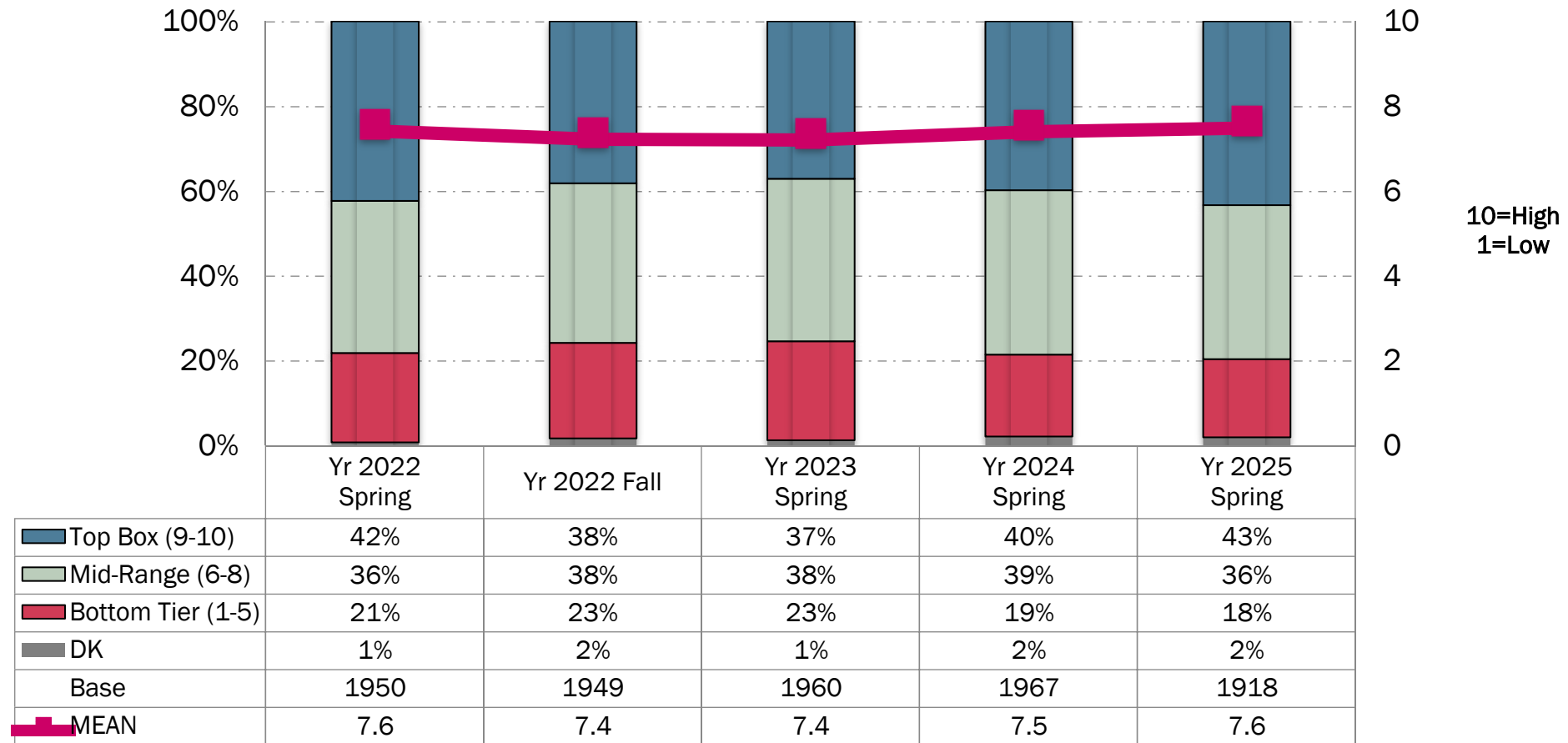
(According to residents **not** favorable toward tourism in Hawai'i)



Base: Spring 2024 (579), Spring 2025 (532)

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

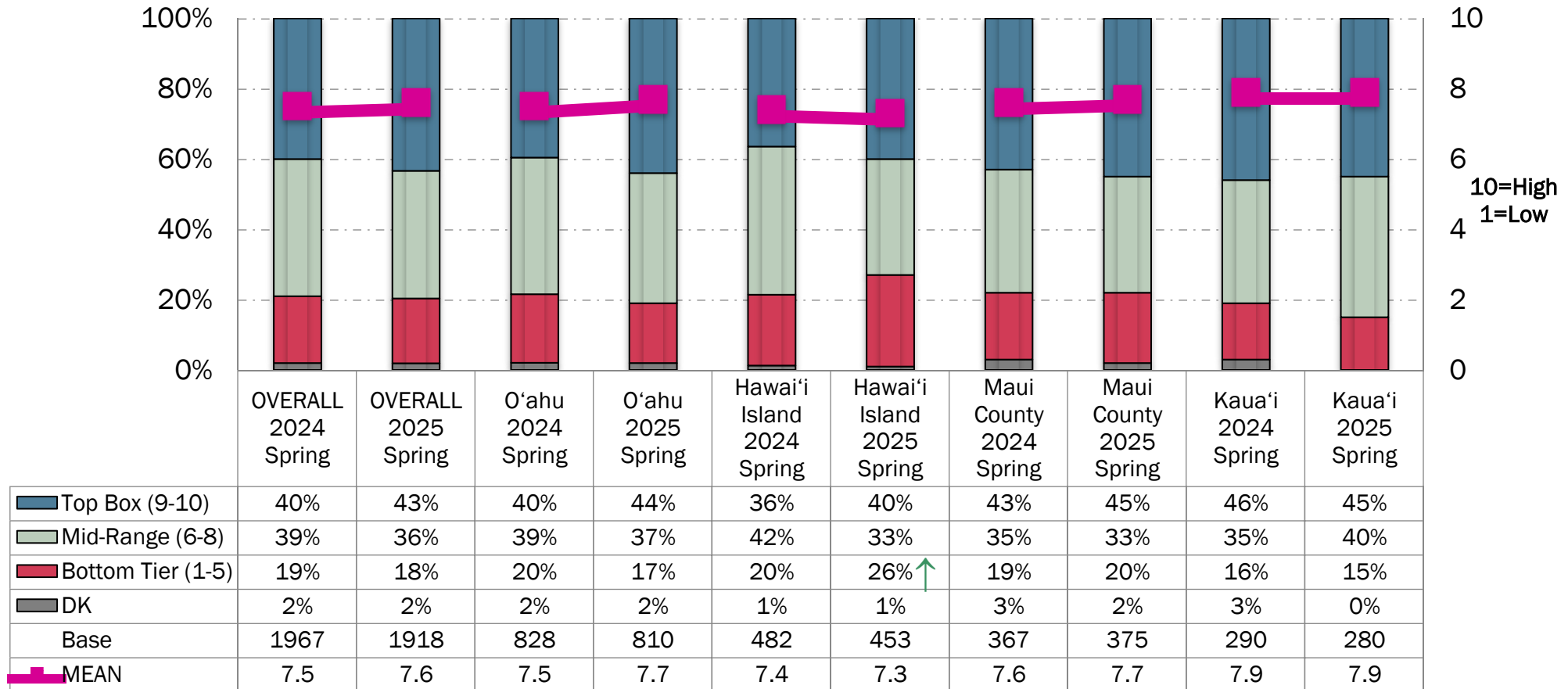
“Creates job opportunities for residents”* – Overall



Q4.1 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*



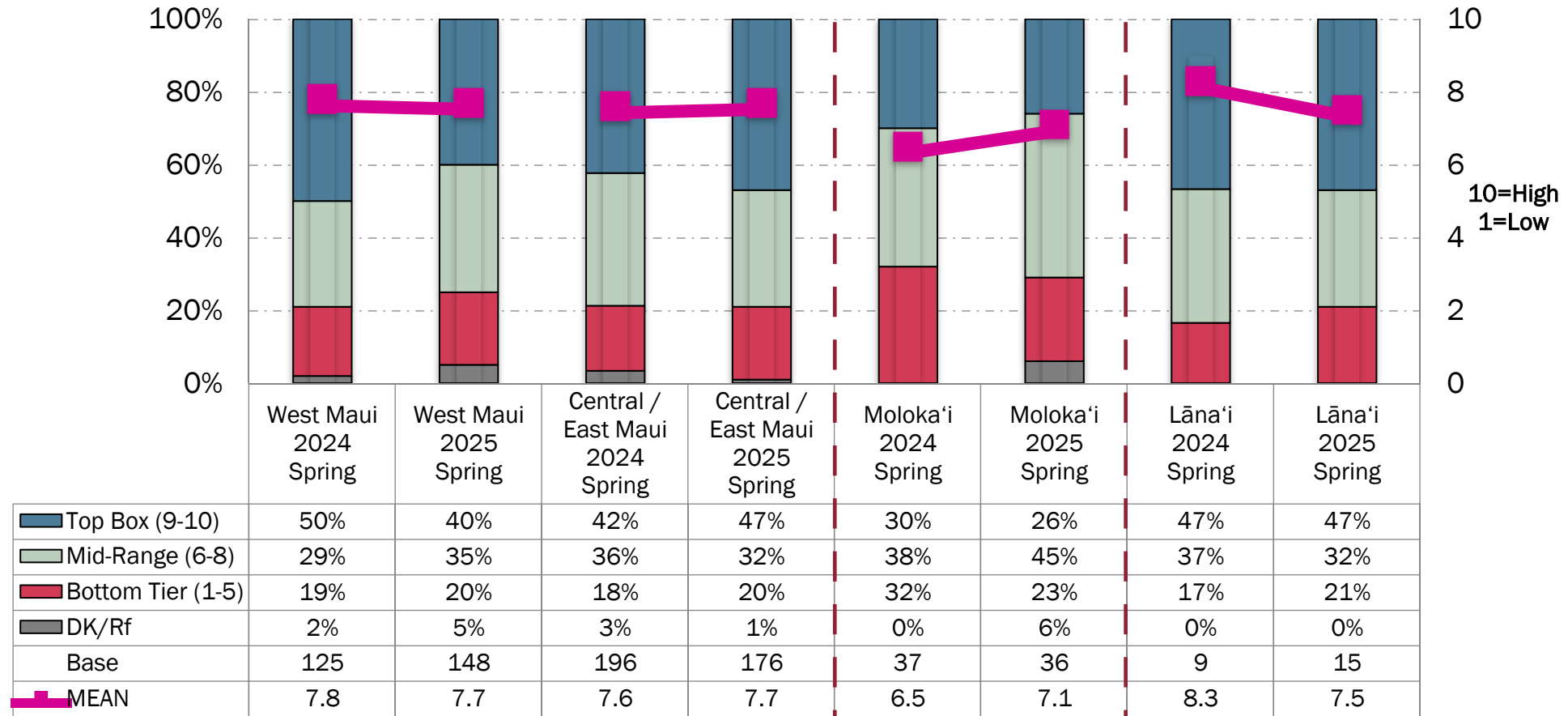
Q4.1 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



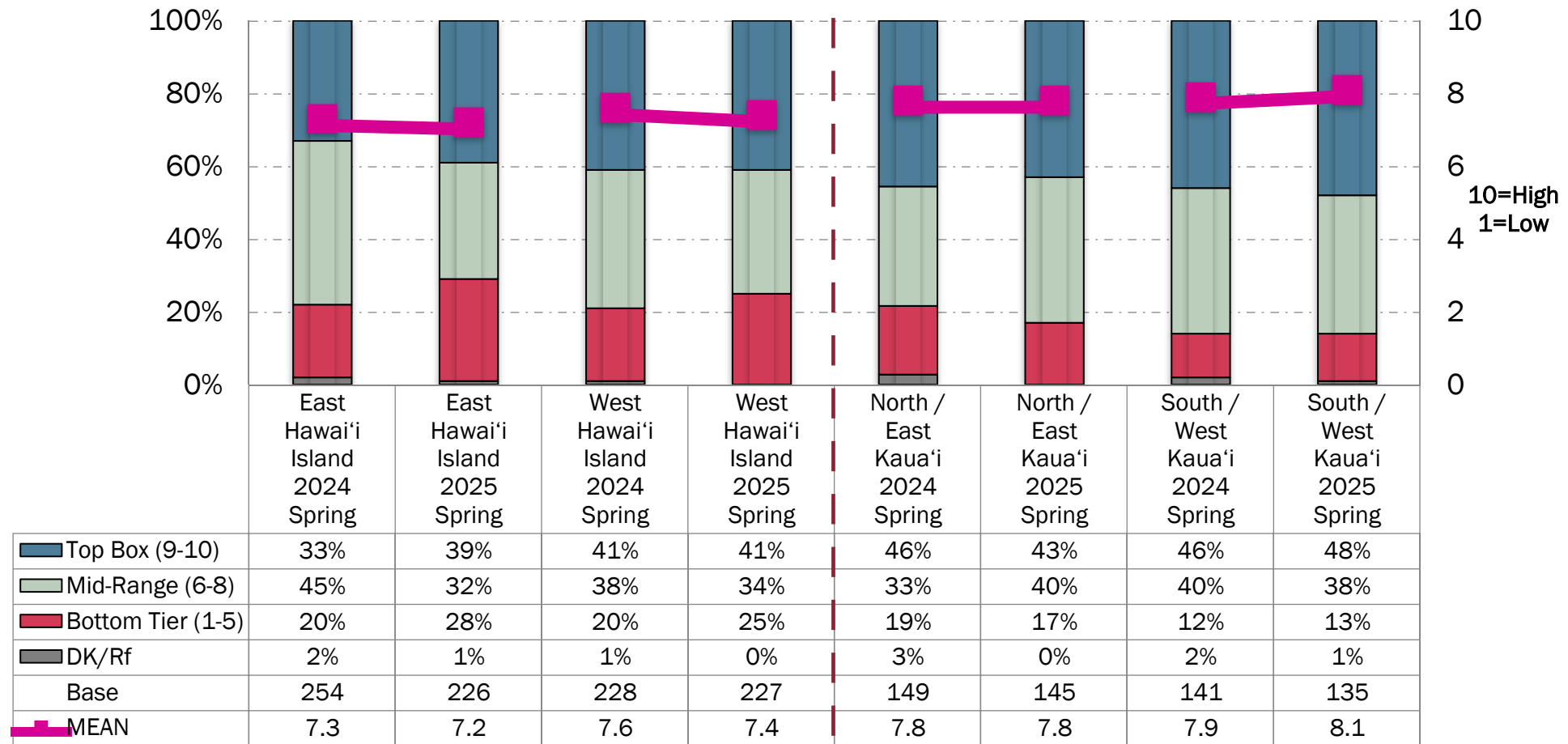
Q4.1 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



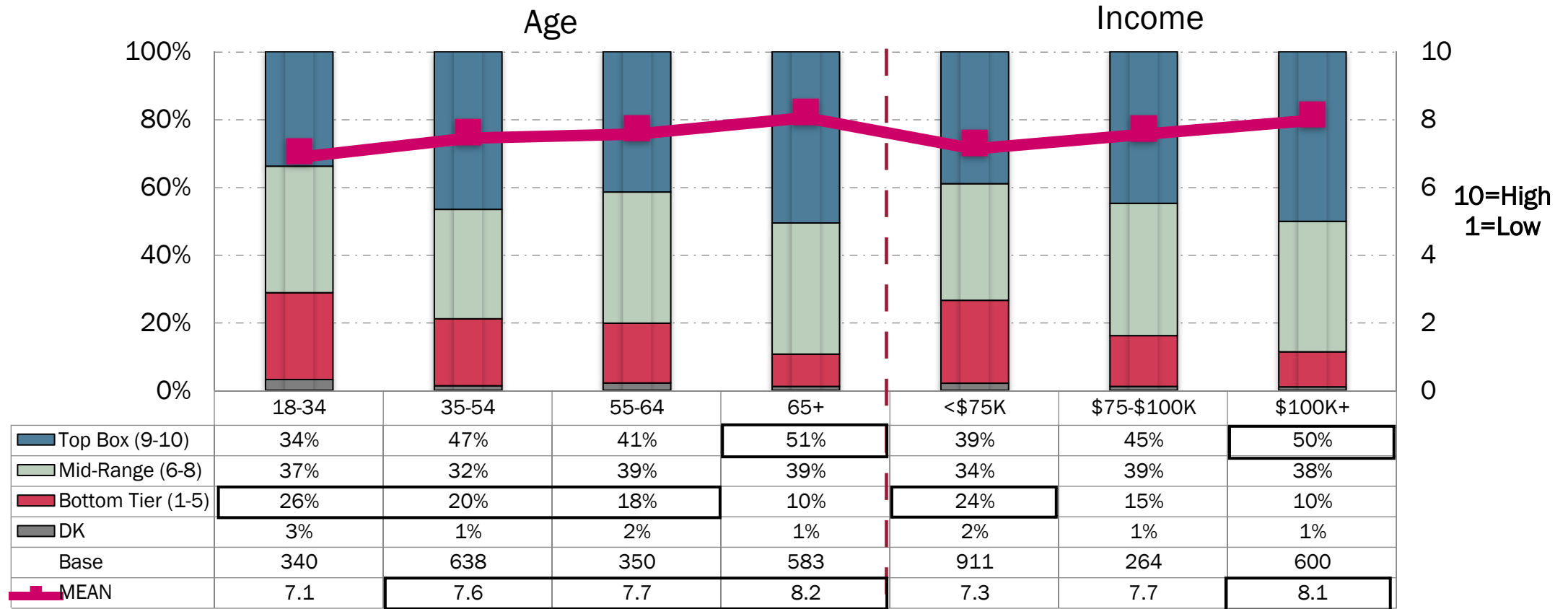
Q4.1 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



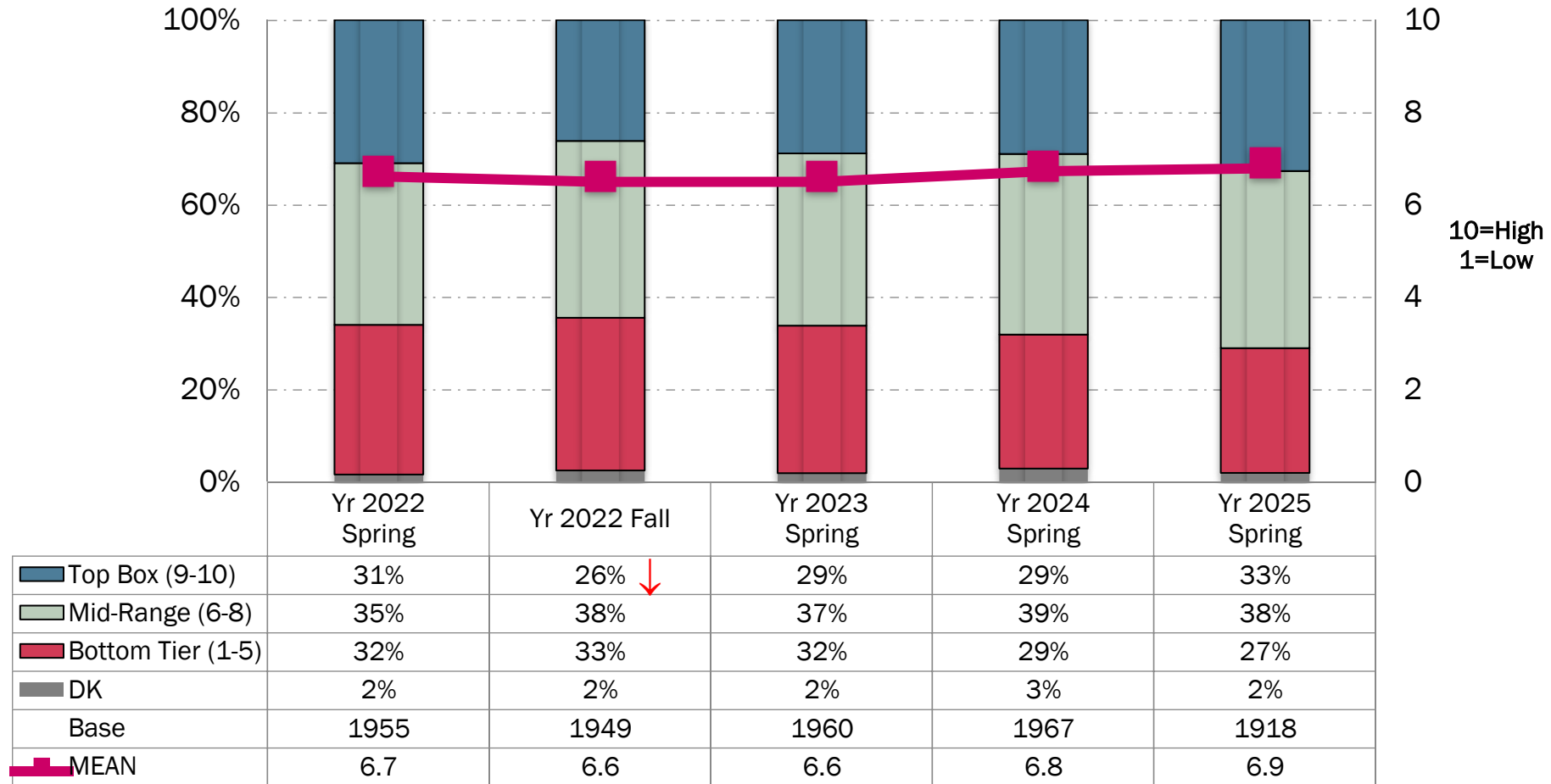
Q4.1 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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...?

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



Q4.2 I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



Q4.2 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...?

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



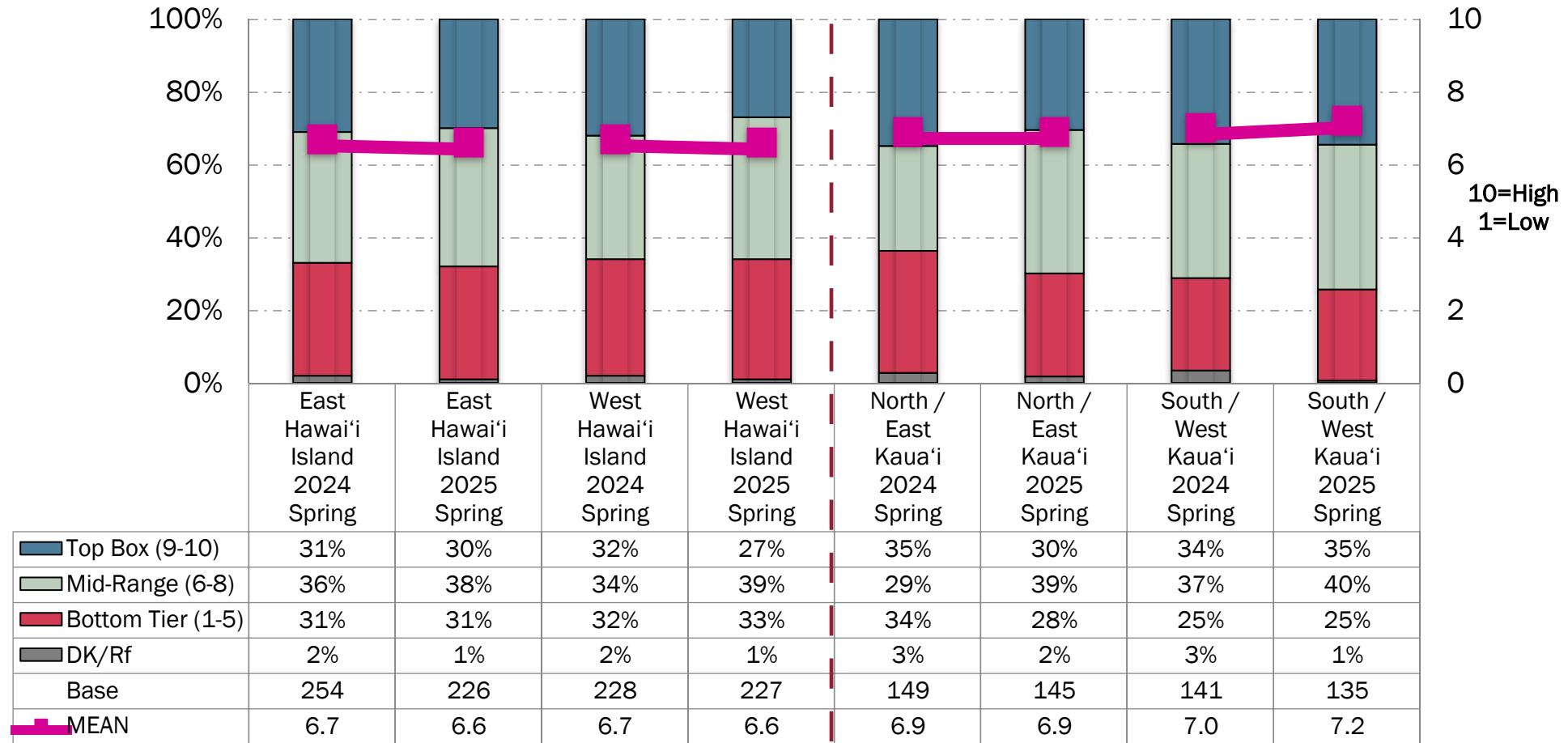
Q4.2 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



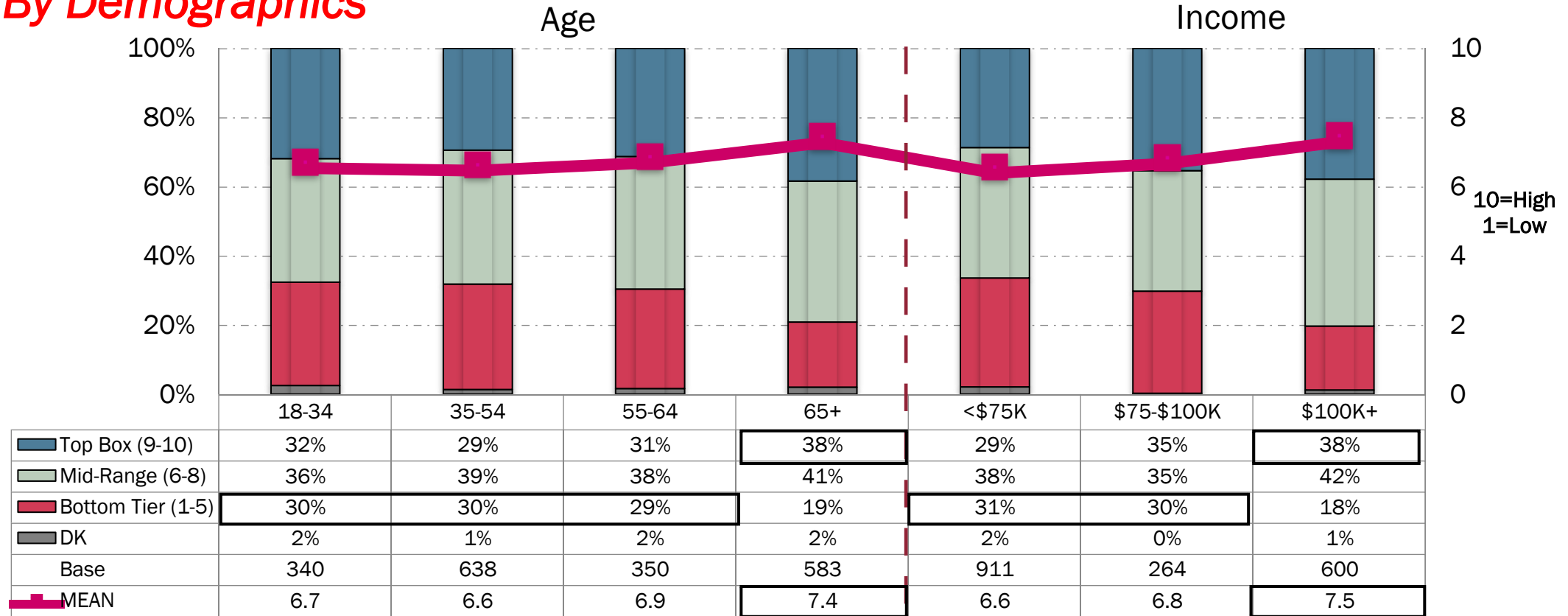
Q4.2 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



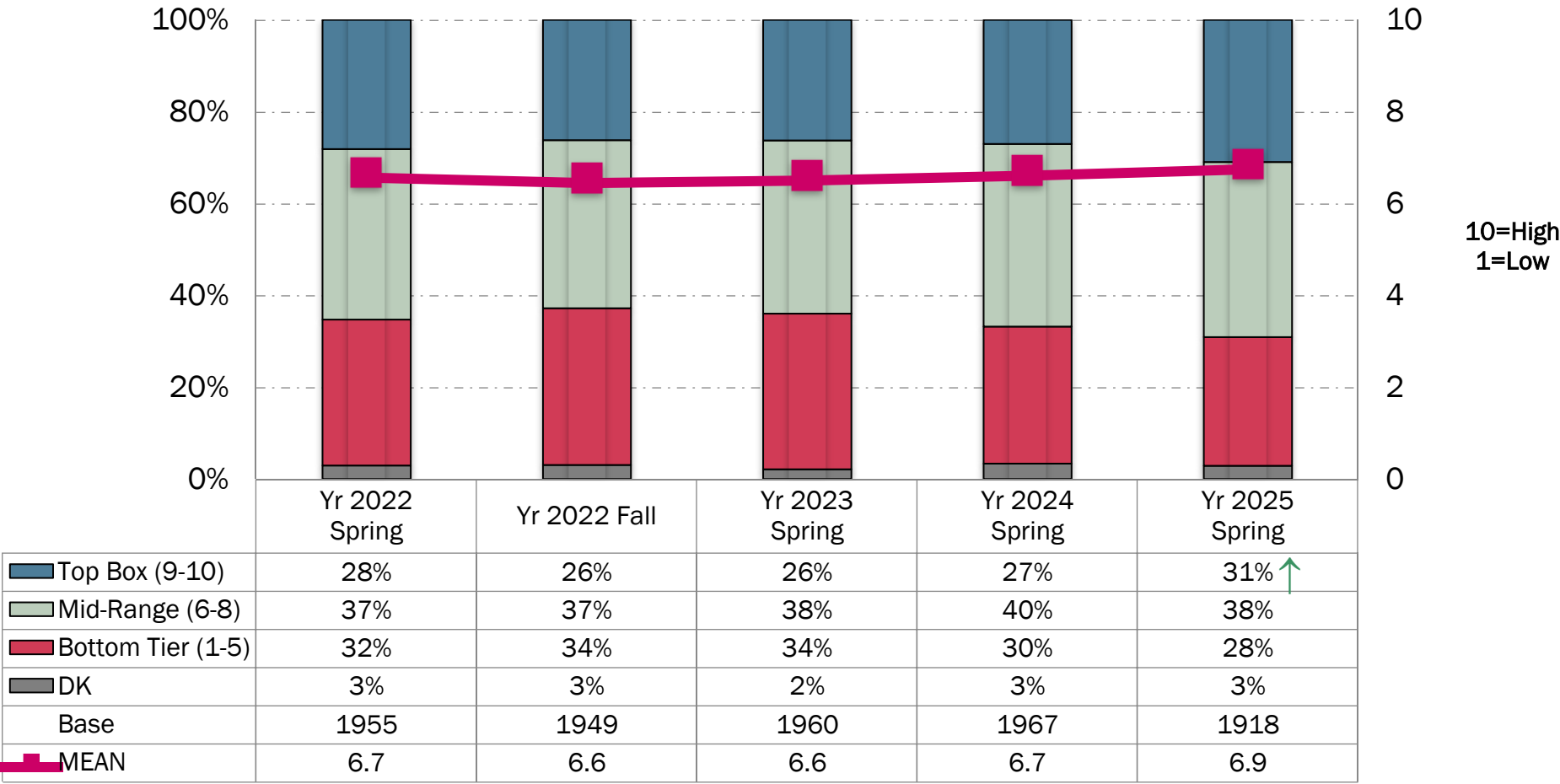
Q4.2 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



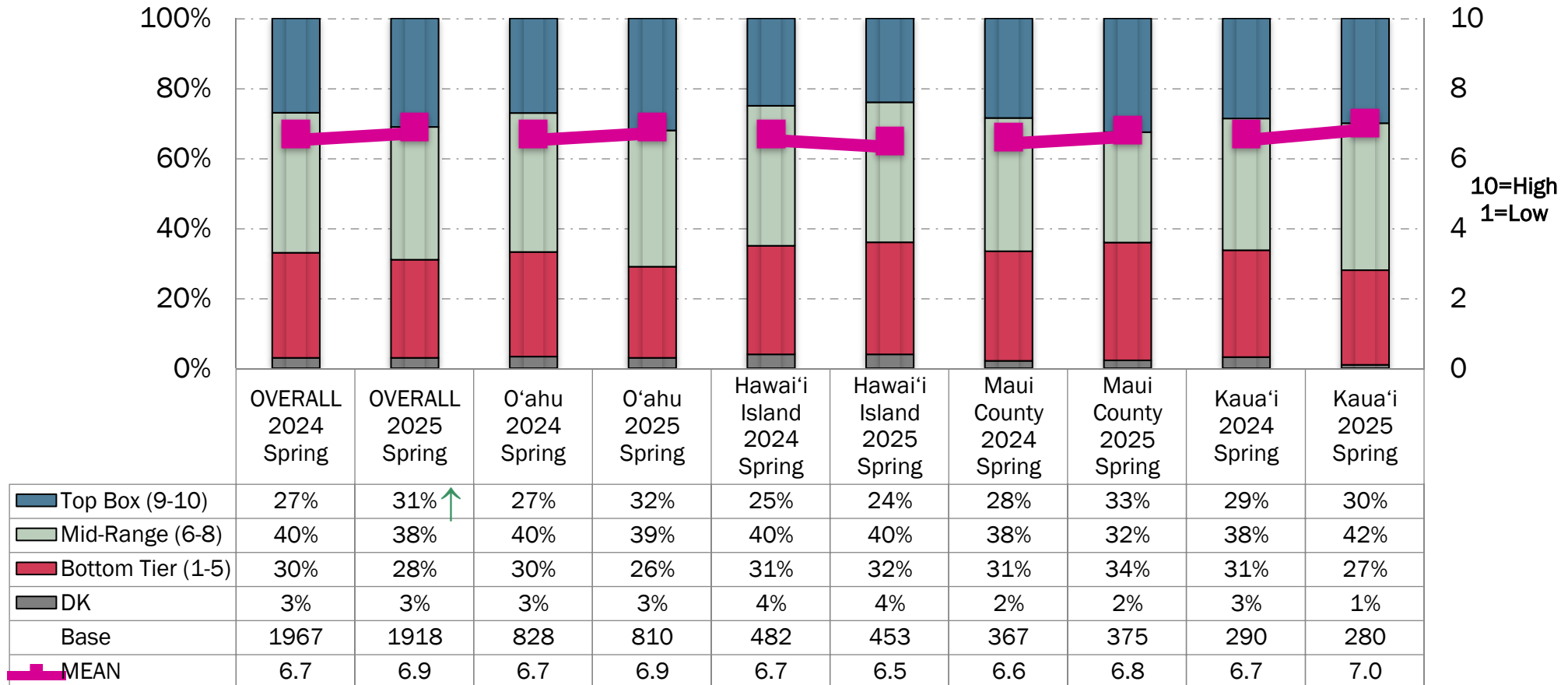
Q4.2 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.3 I’m going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

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



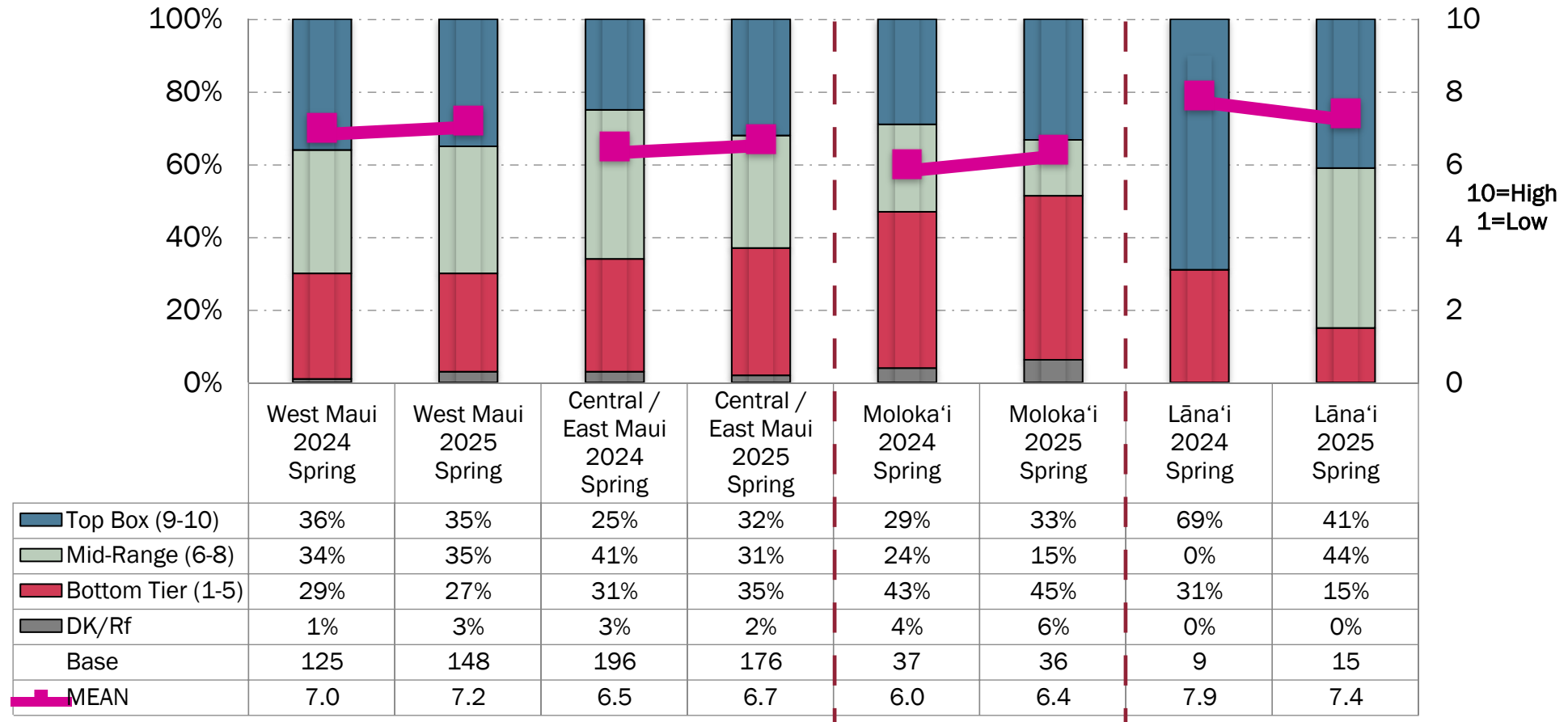
Q4.3 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



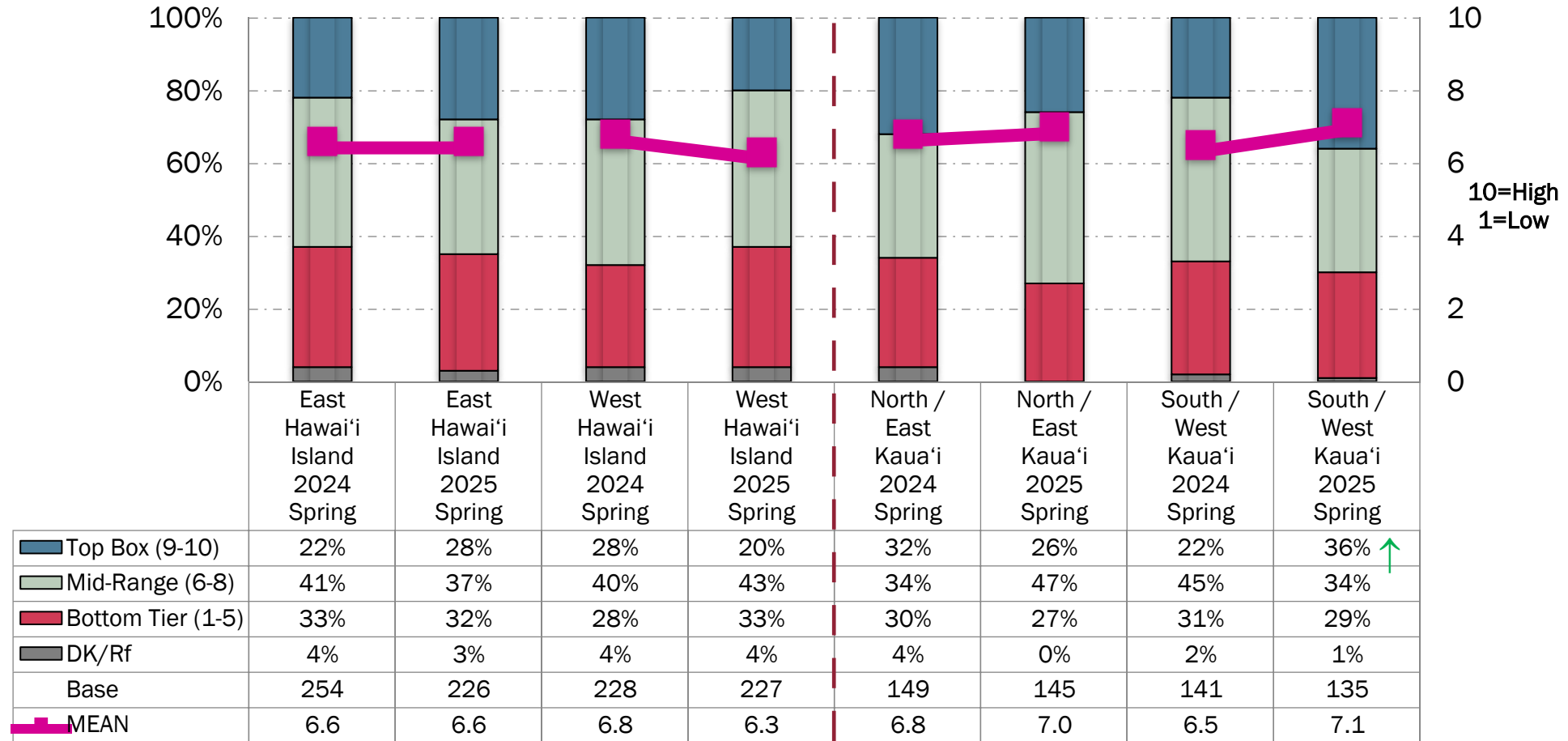
Q4.3 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



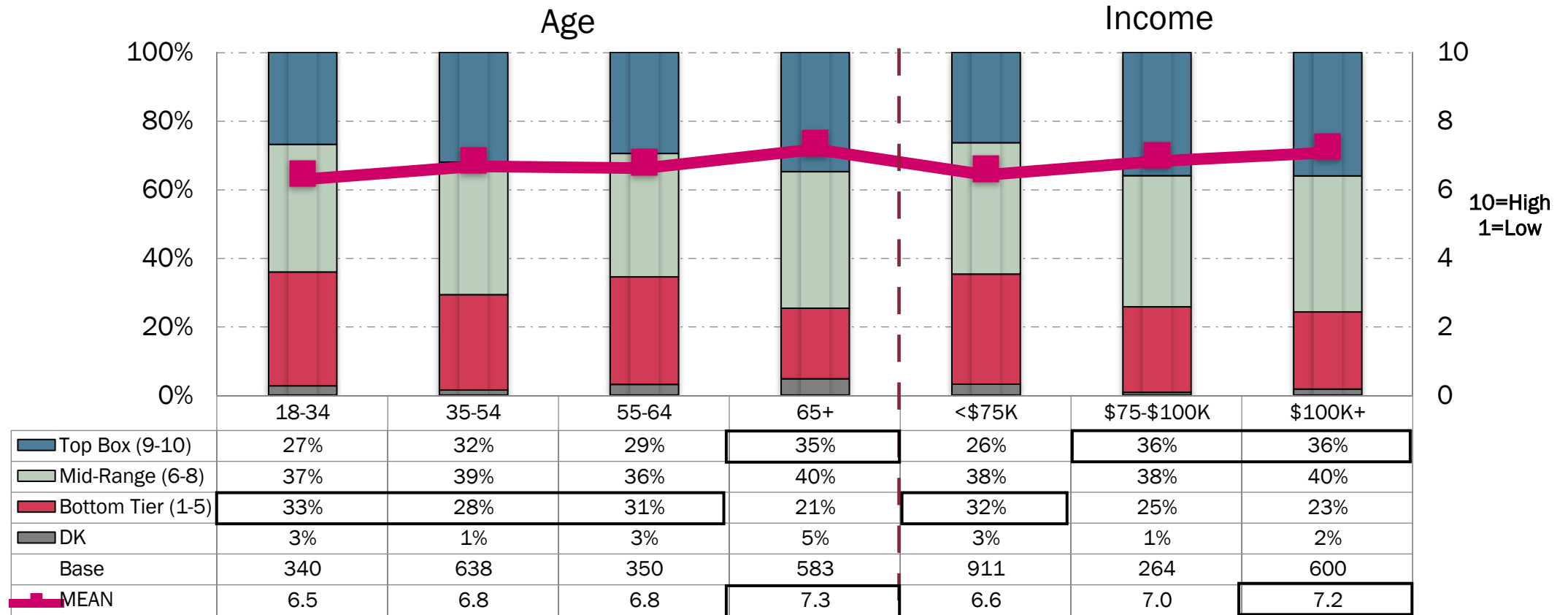
Q4.3 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



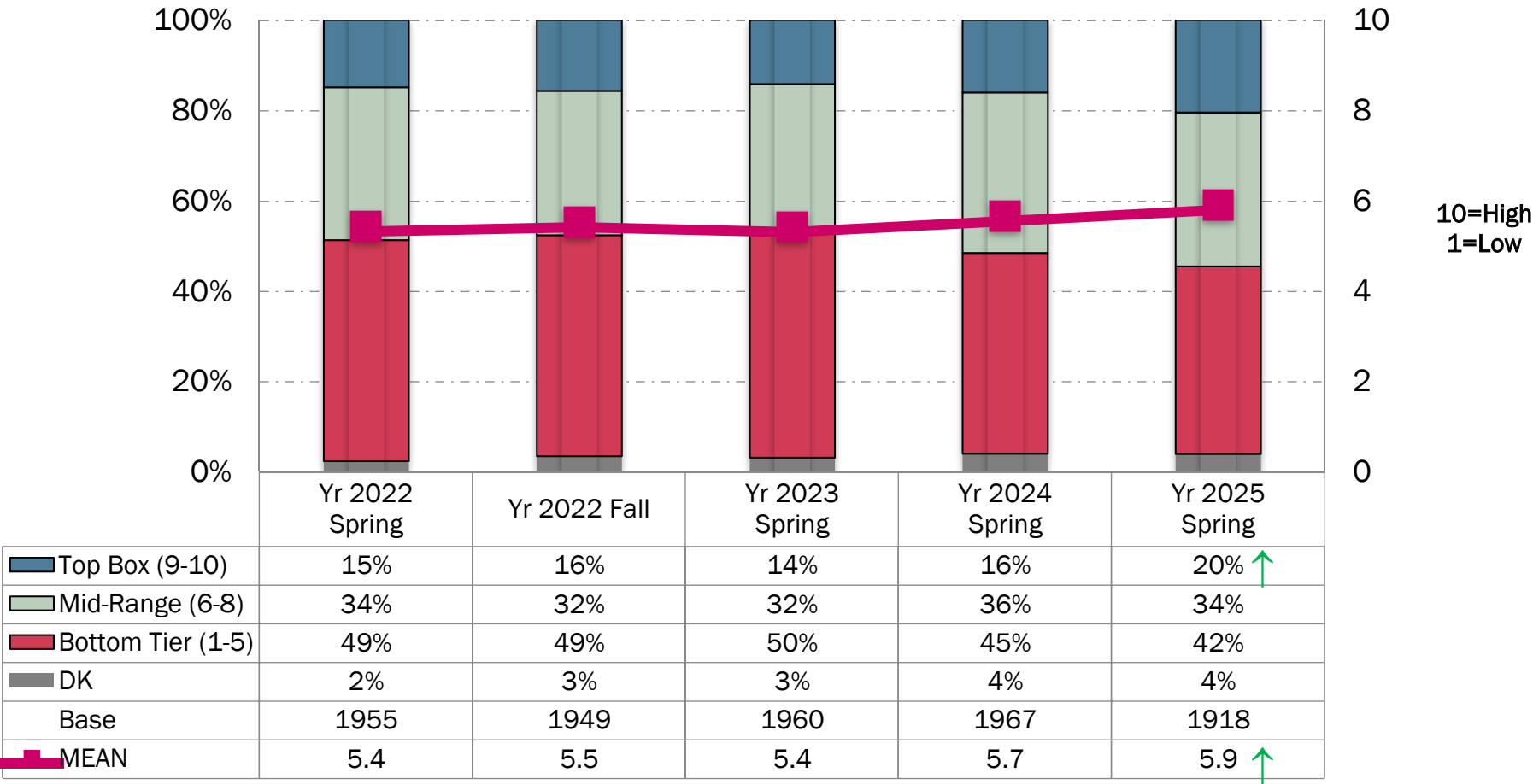
Q4.3 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



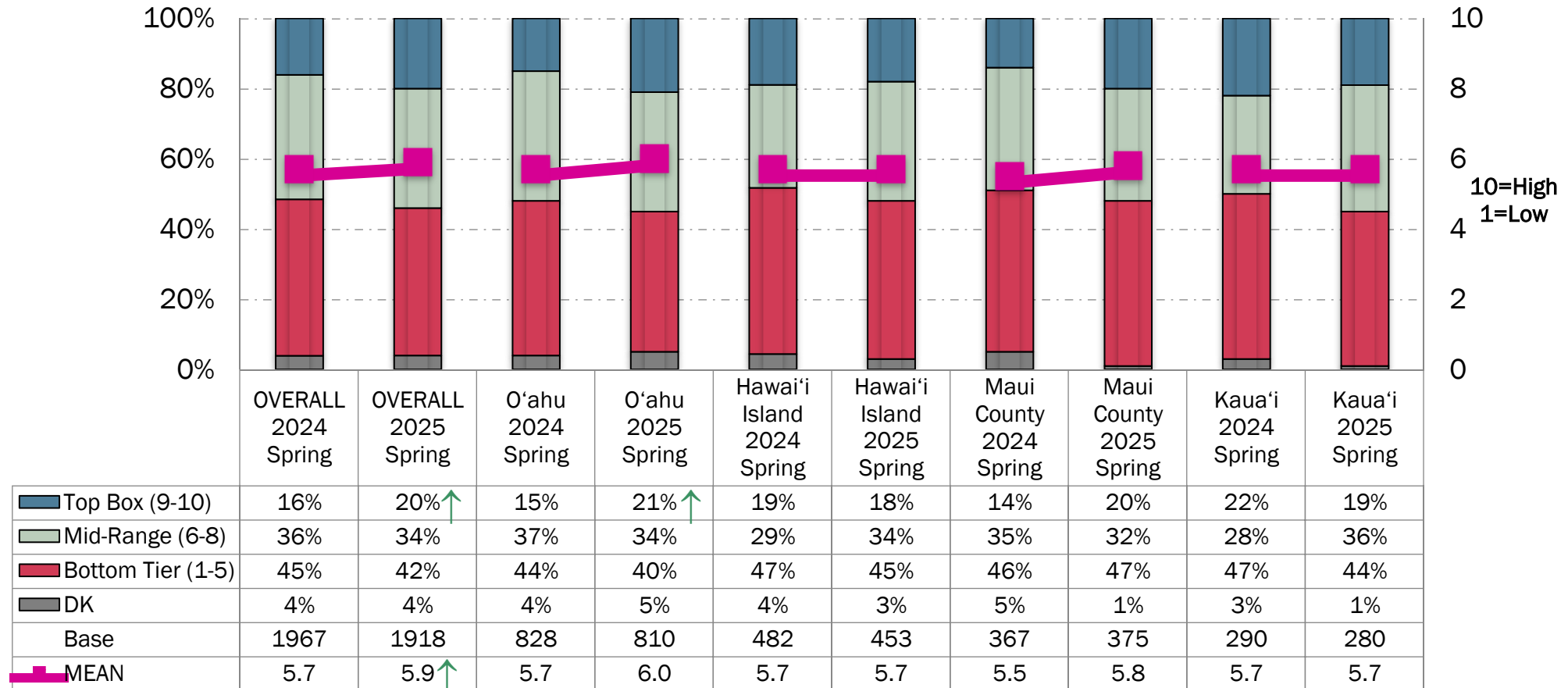
Q4.3 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



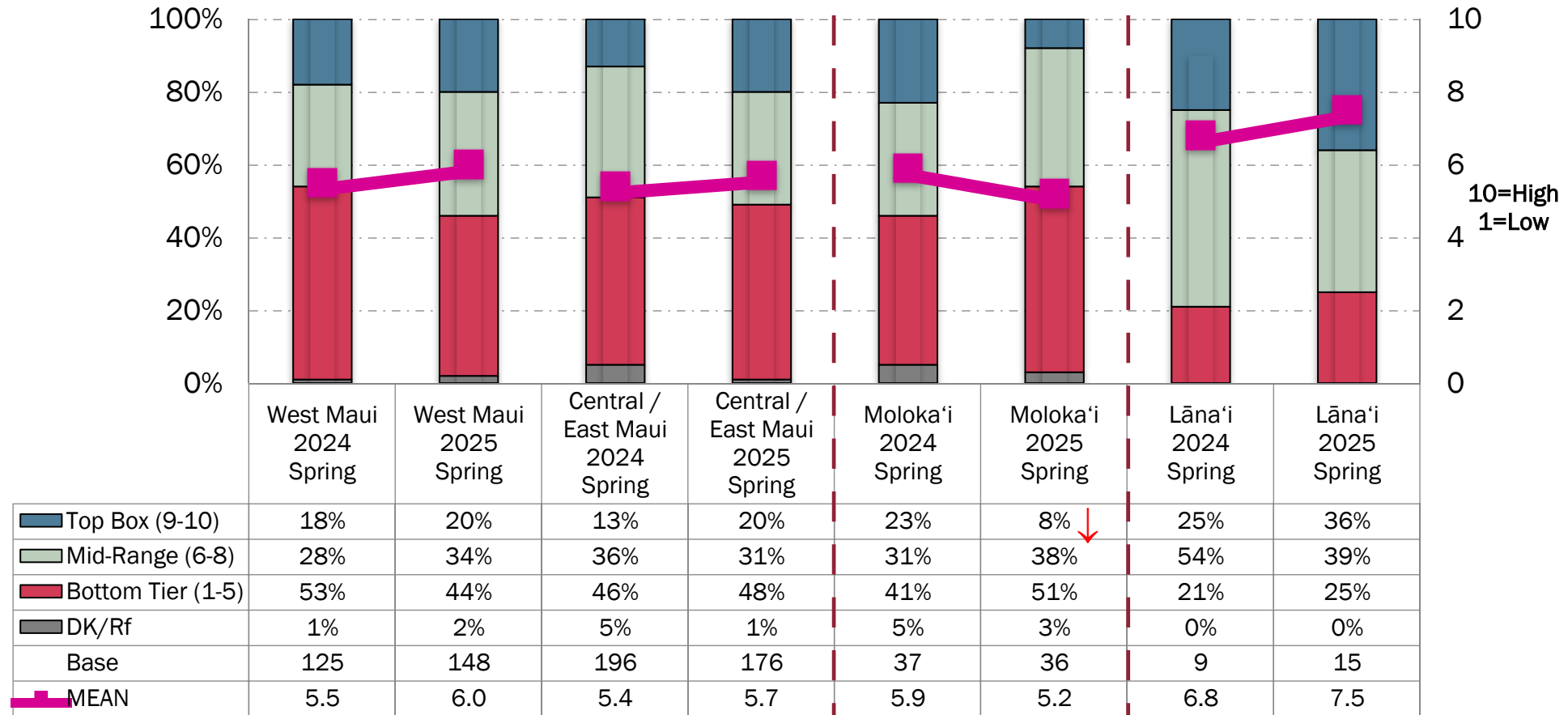
Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



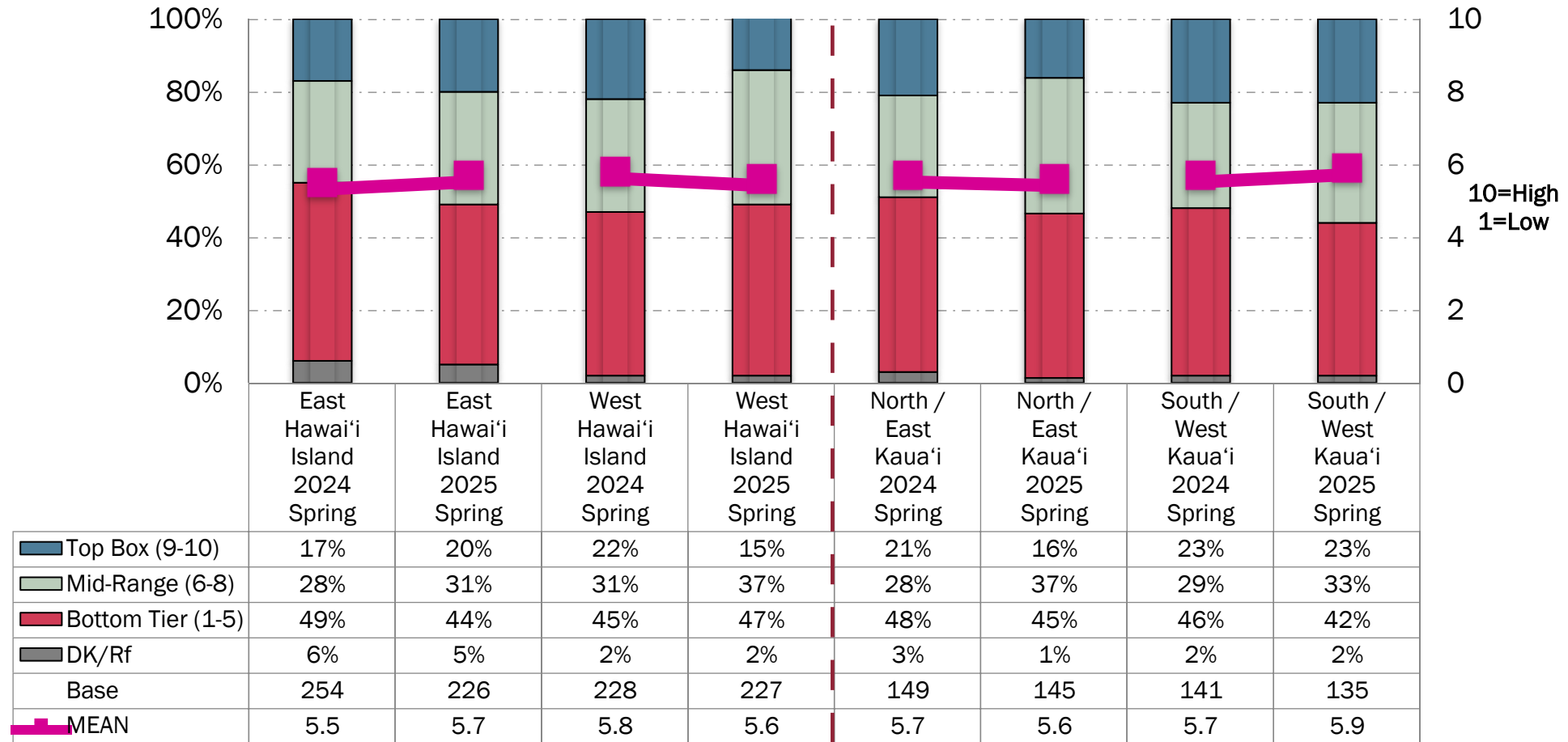
Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



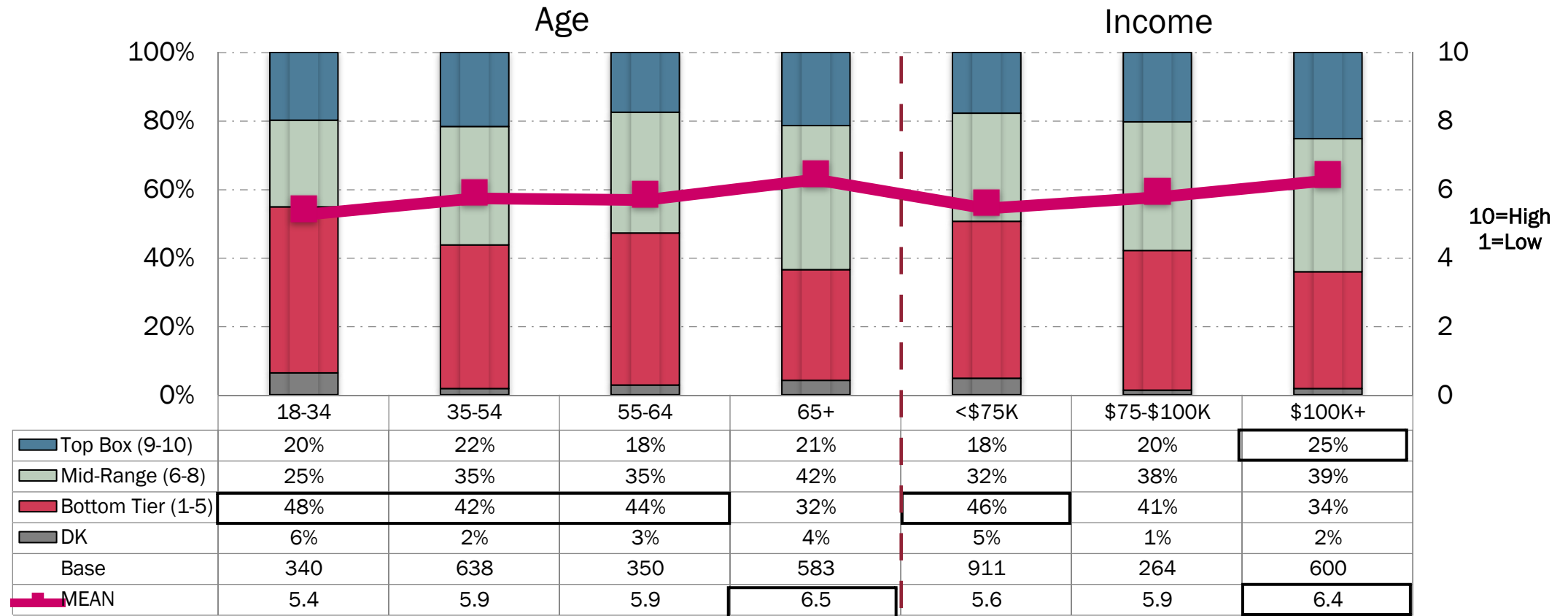
Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



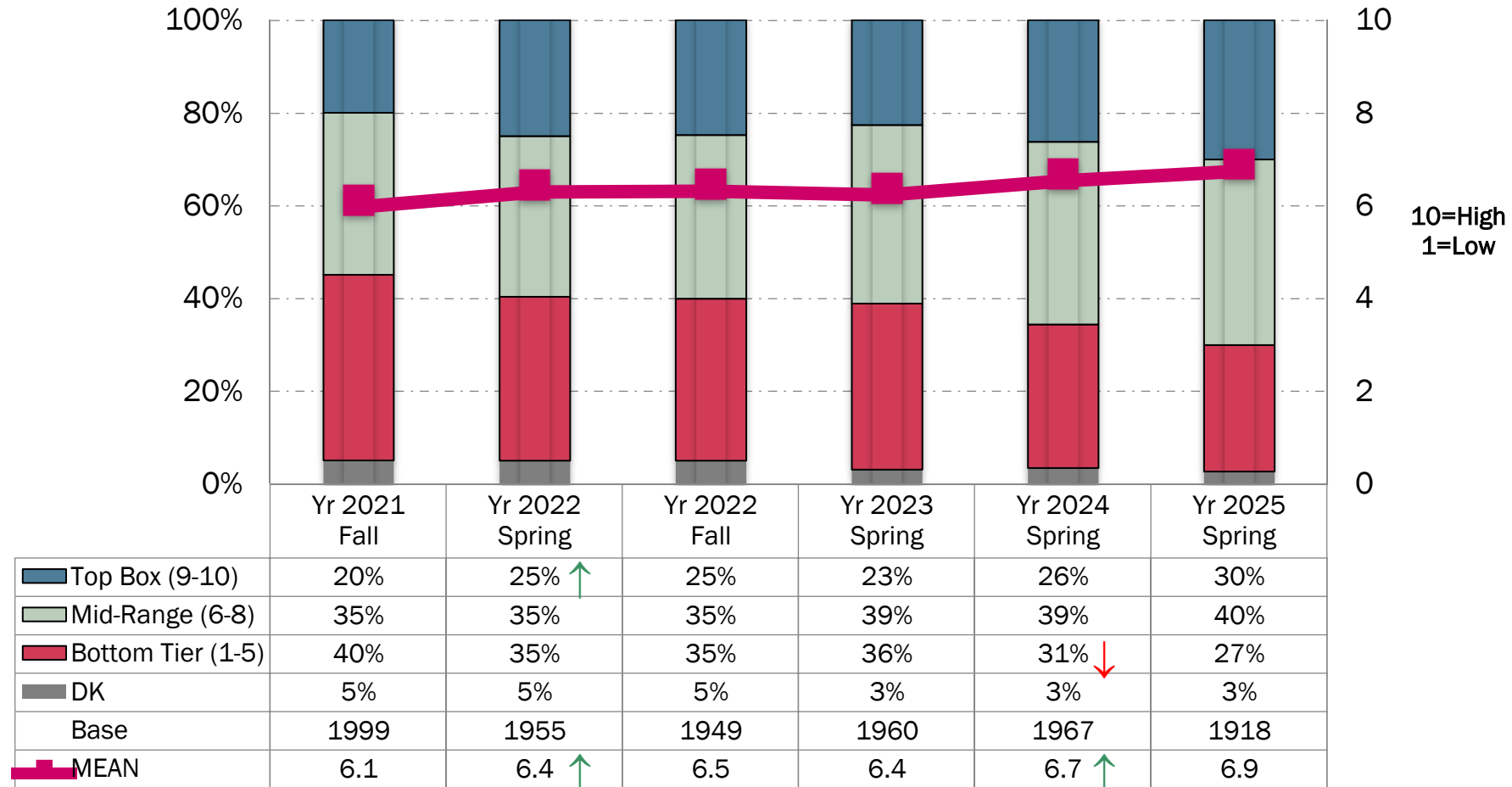
Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



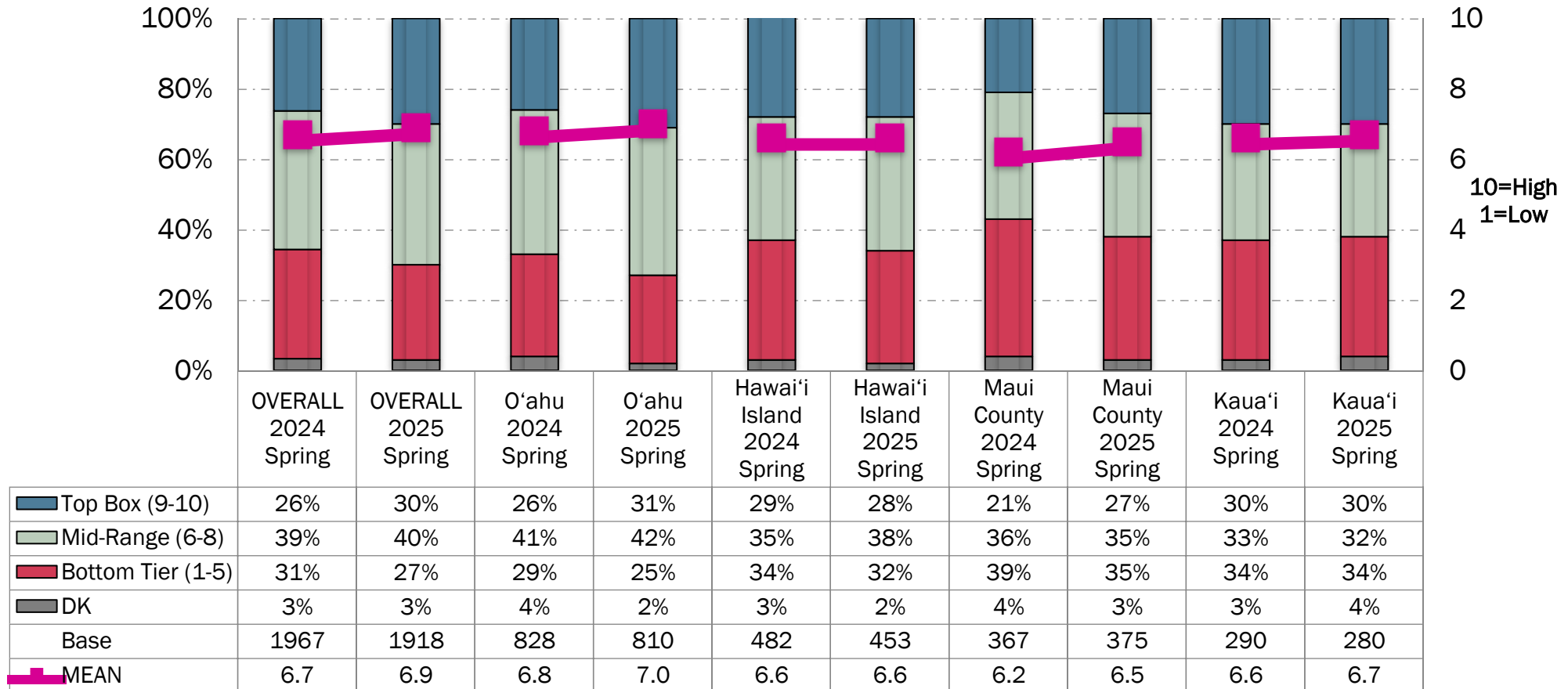
Q4.6 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.7 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



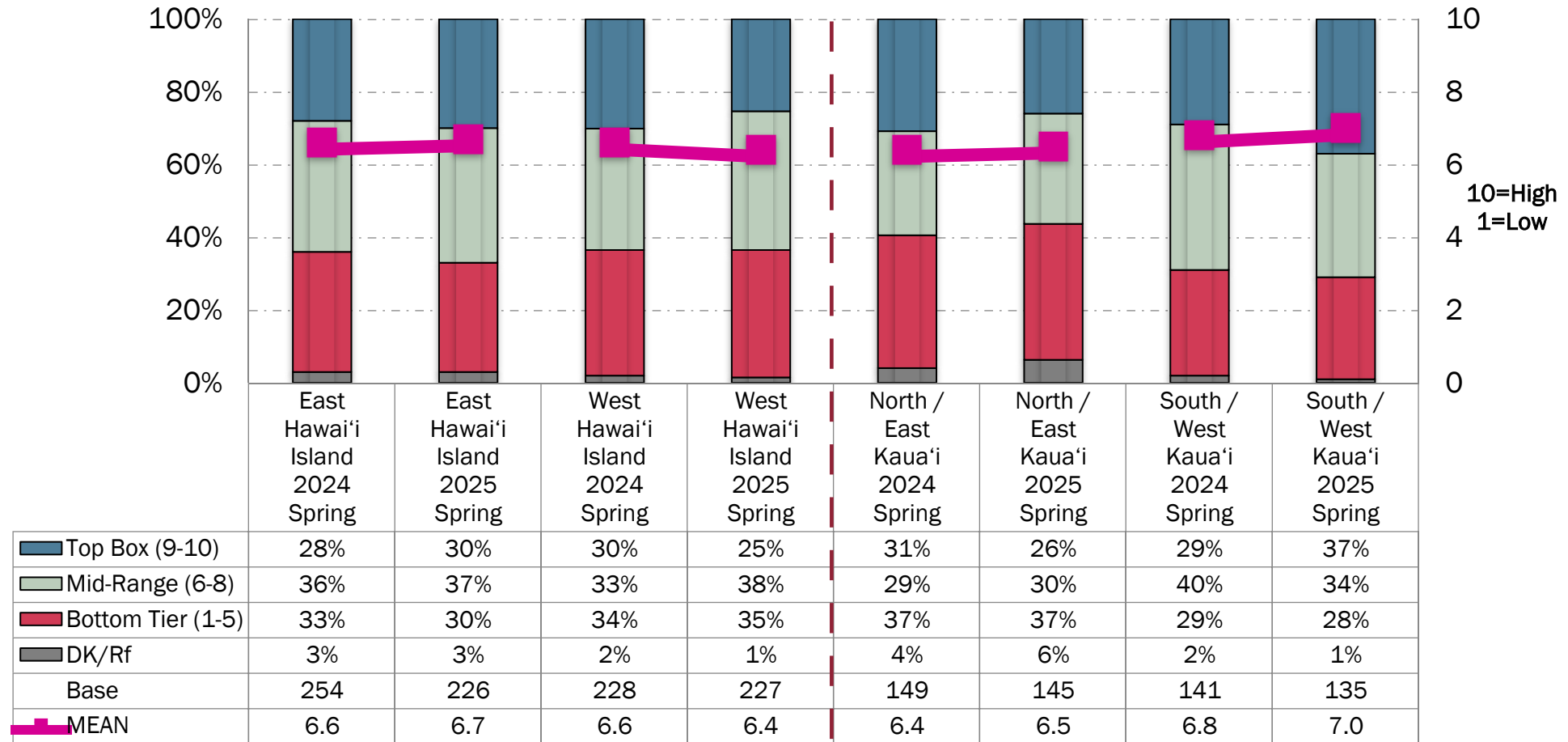
Q4.7. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



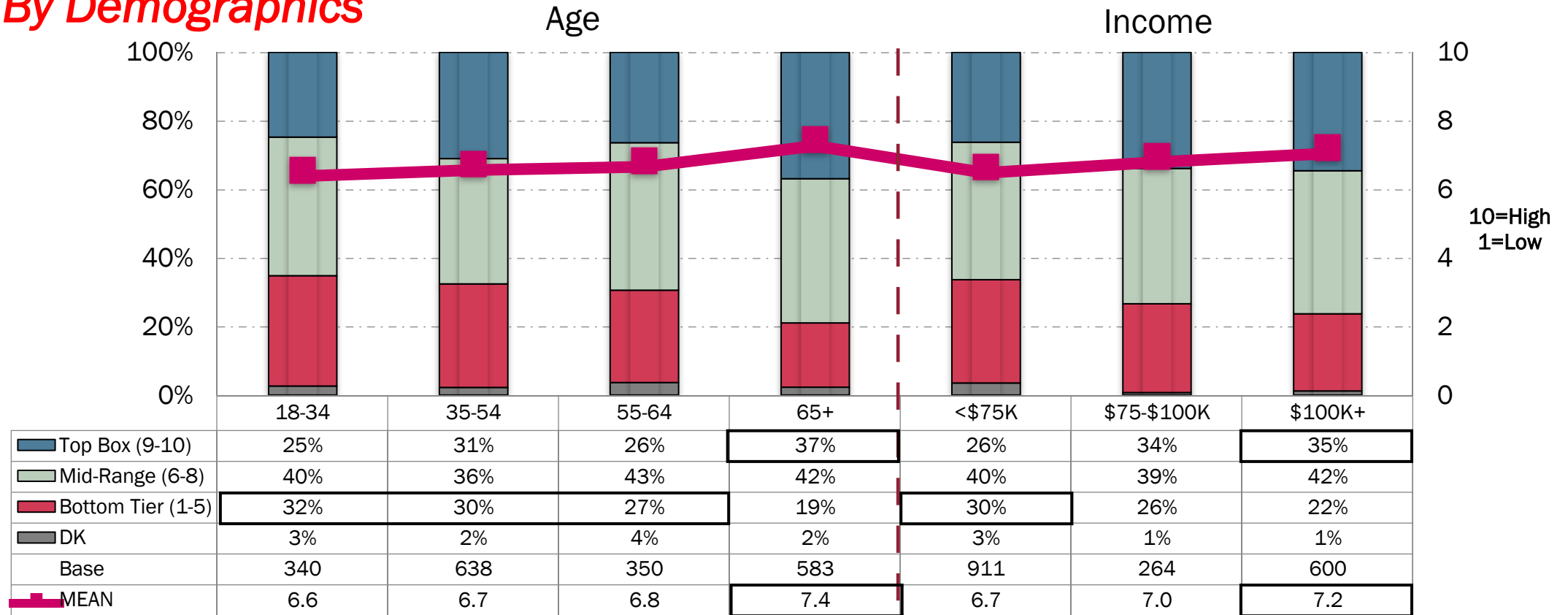
Q4.7 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



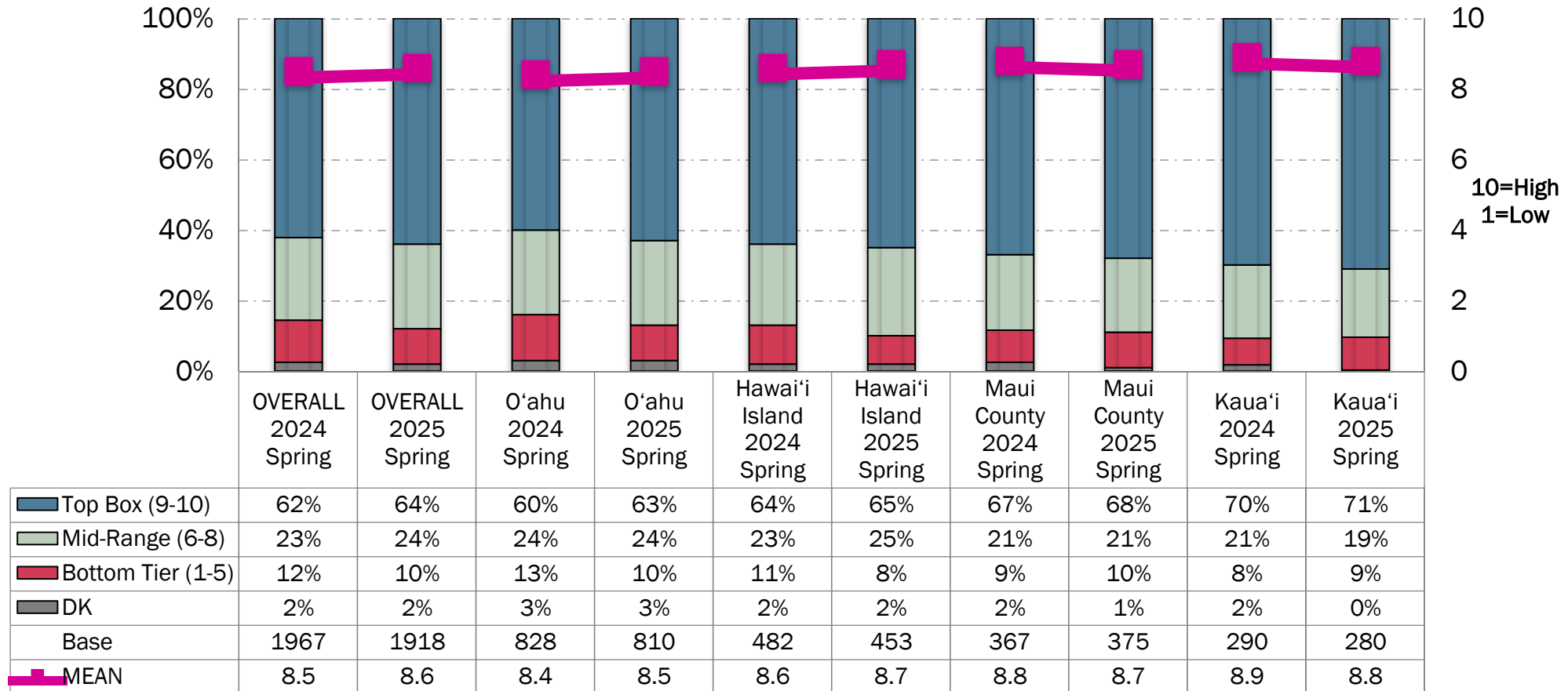
Q4.7 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



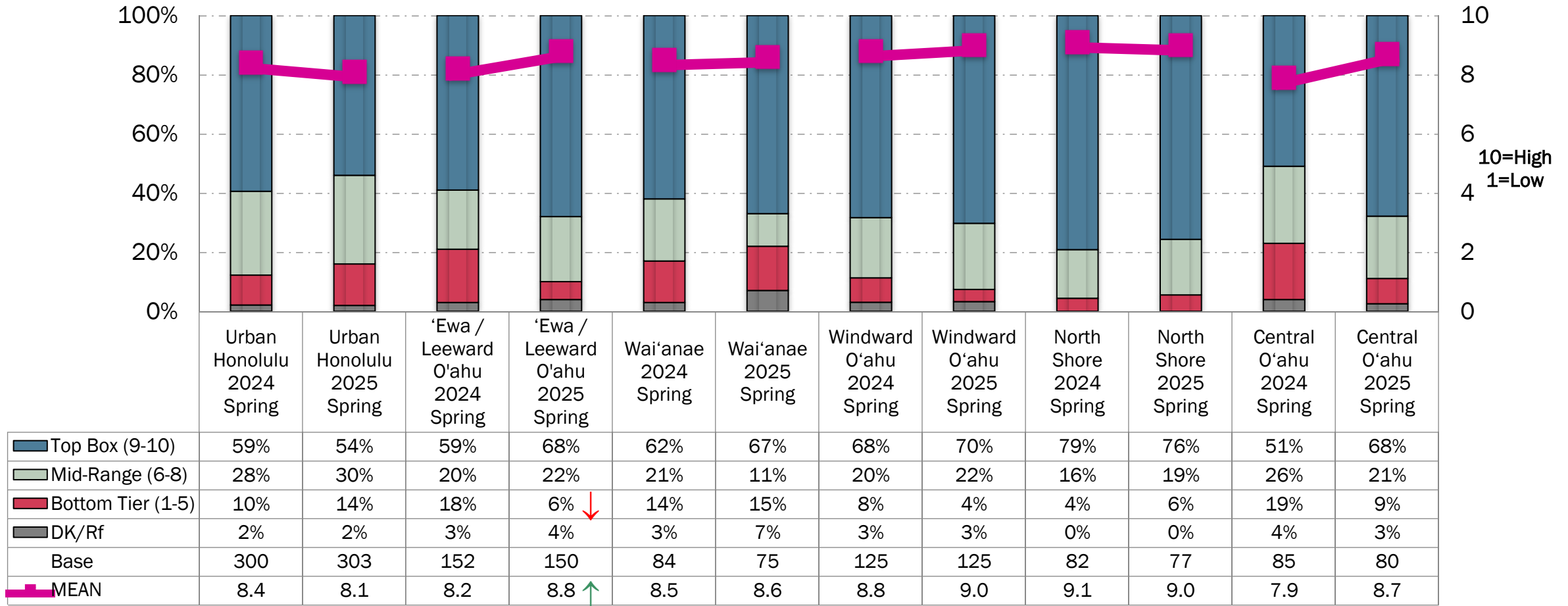
Q4.7 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



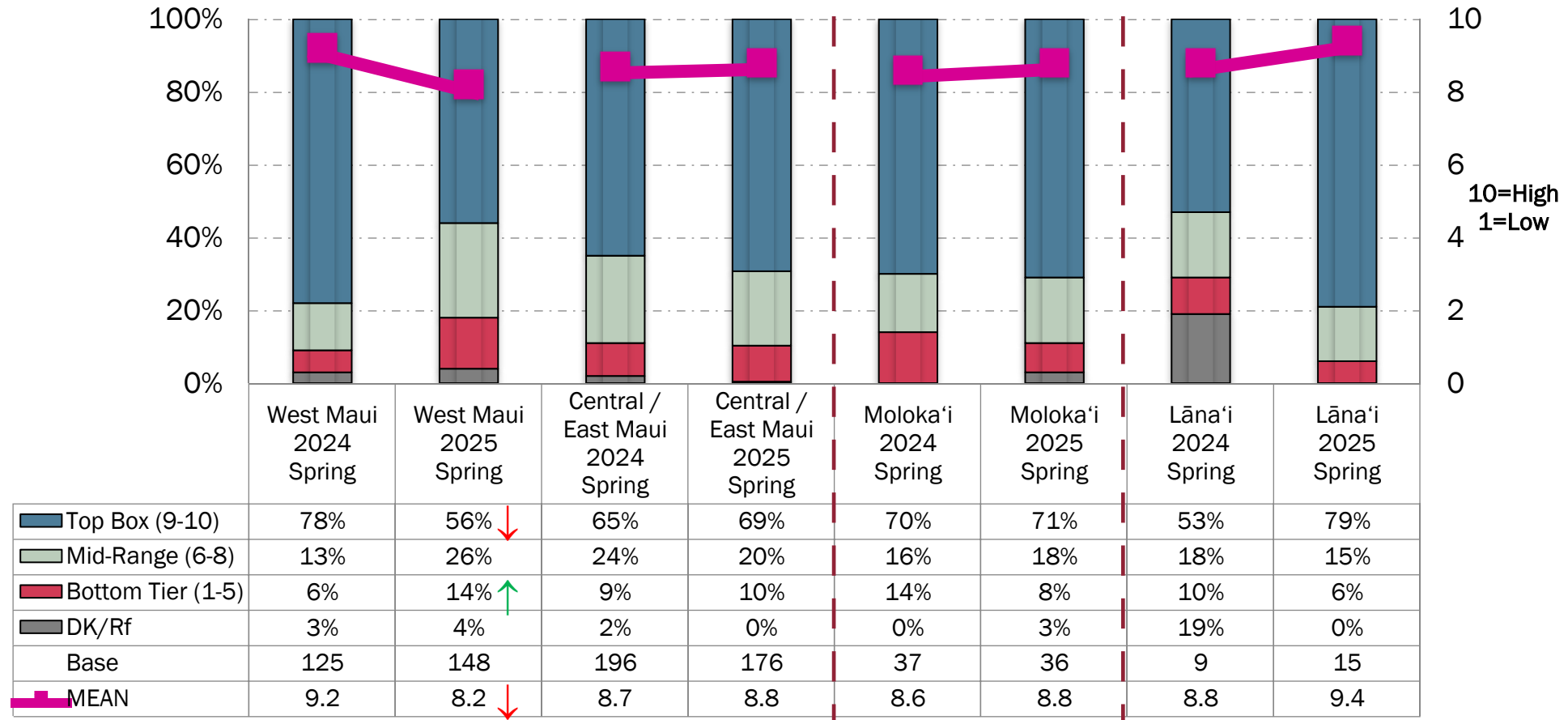
Q4.13 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



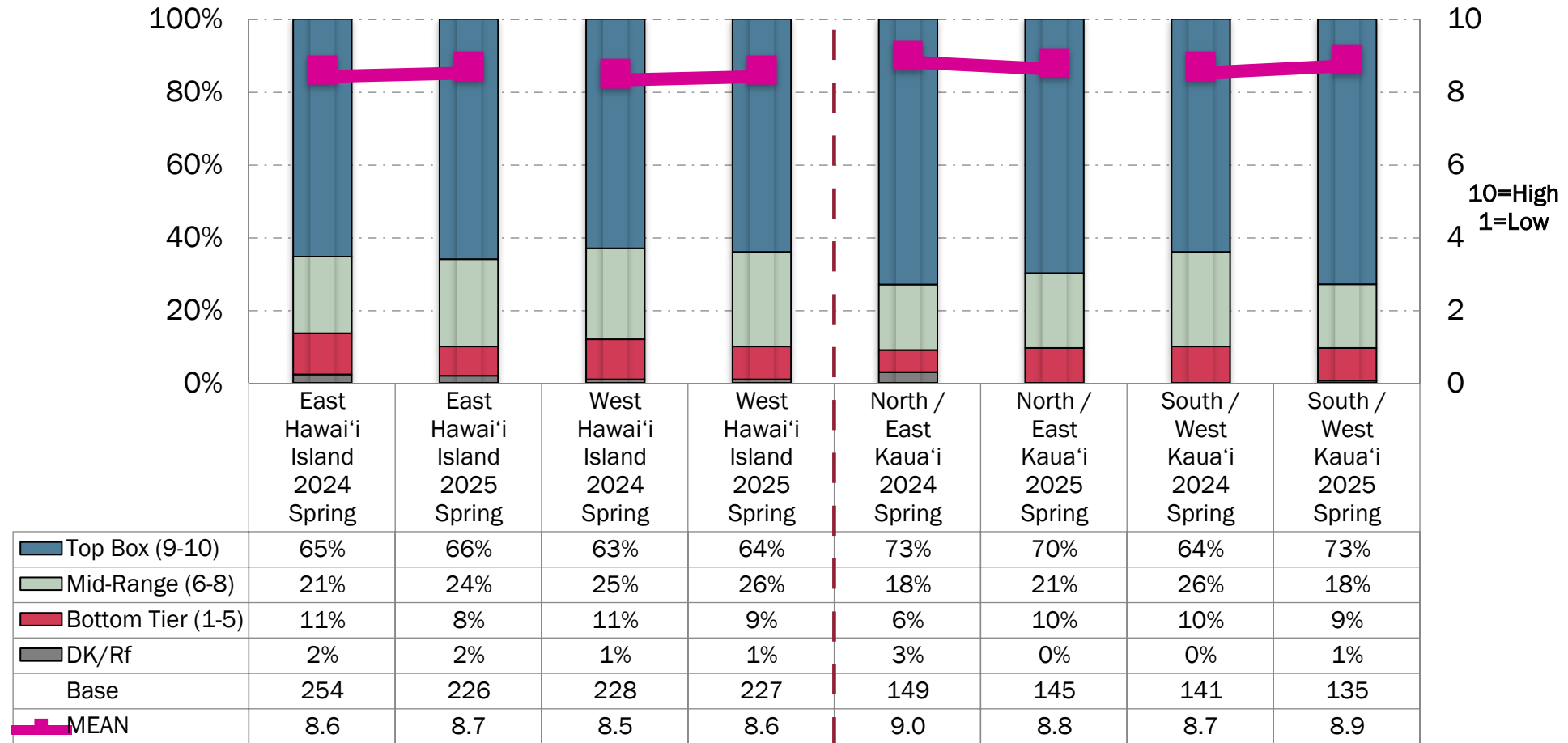
Q4.13 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



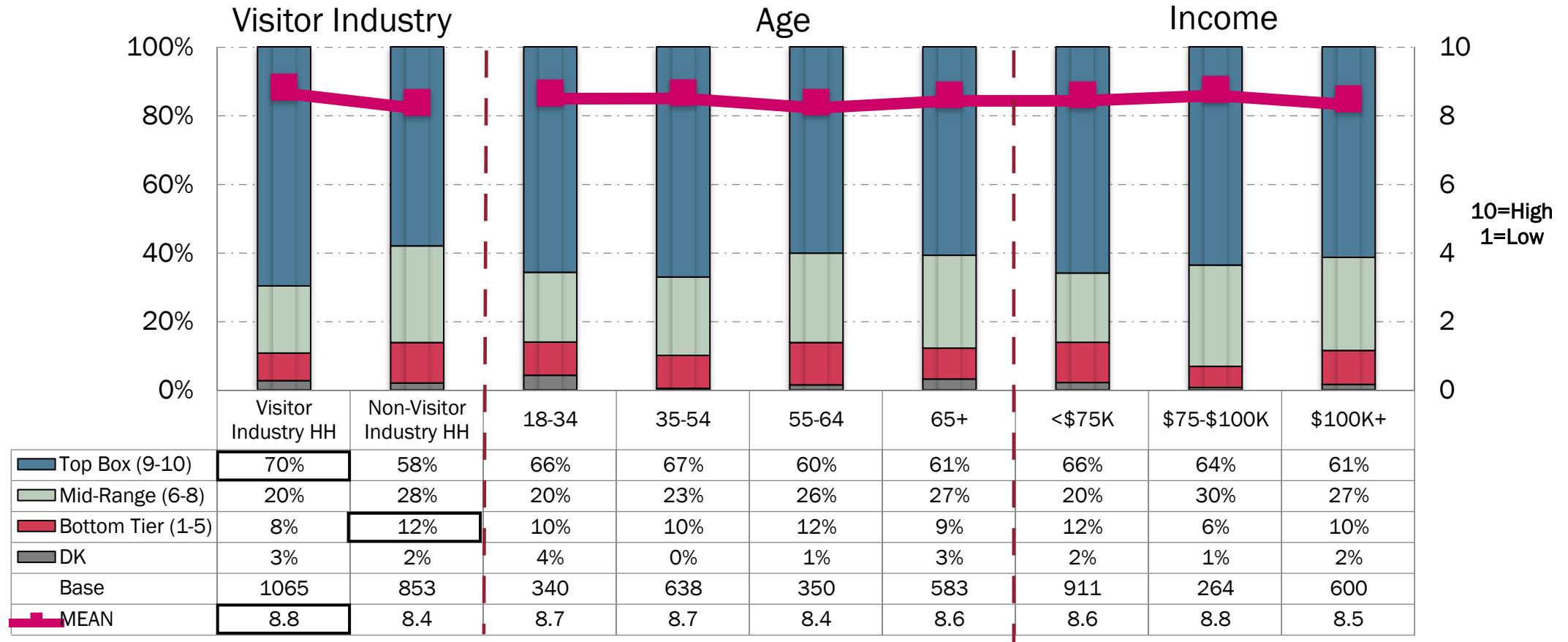
Q4.13 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



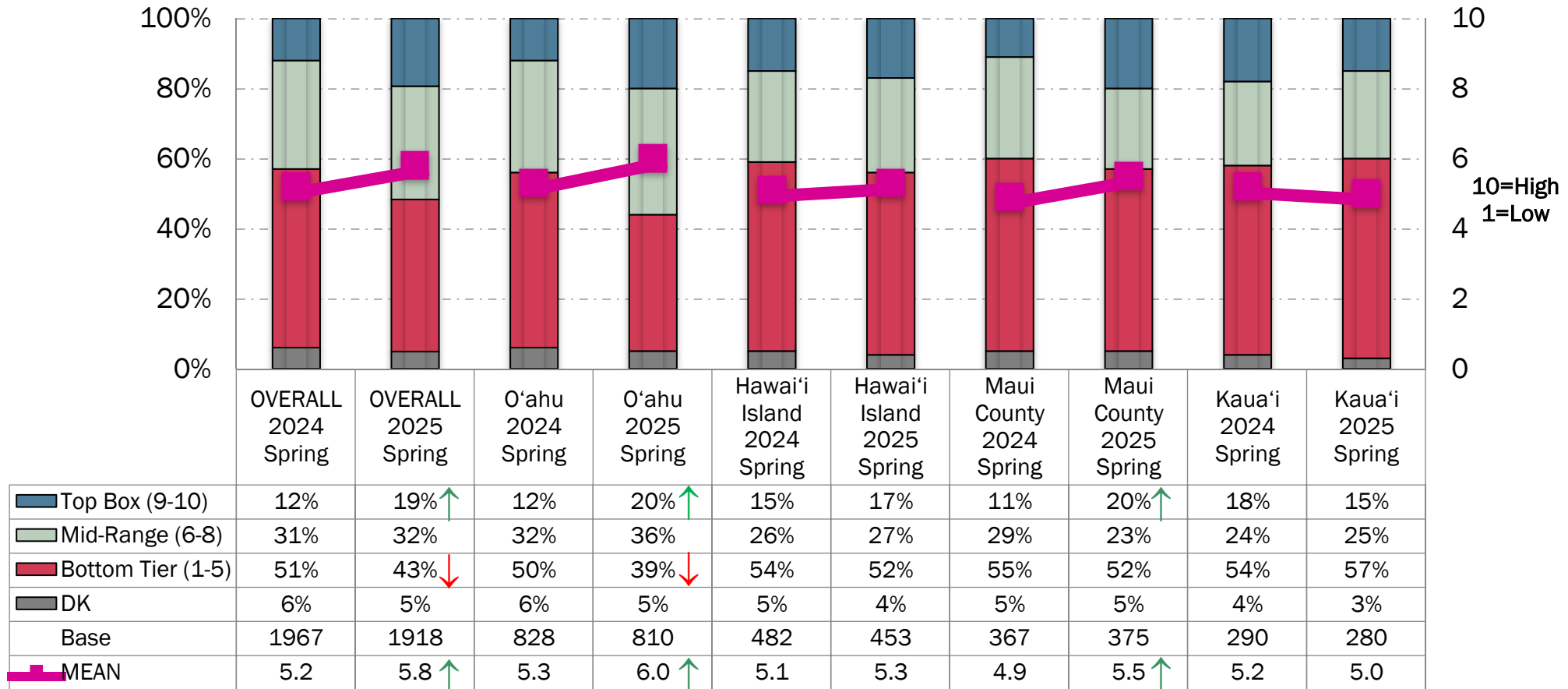
Q4.13 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



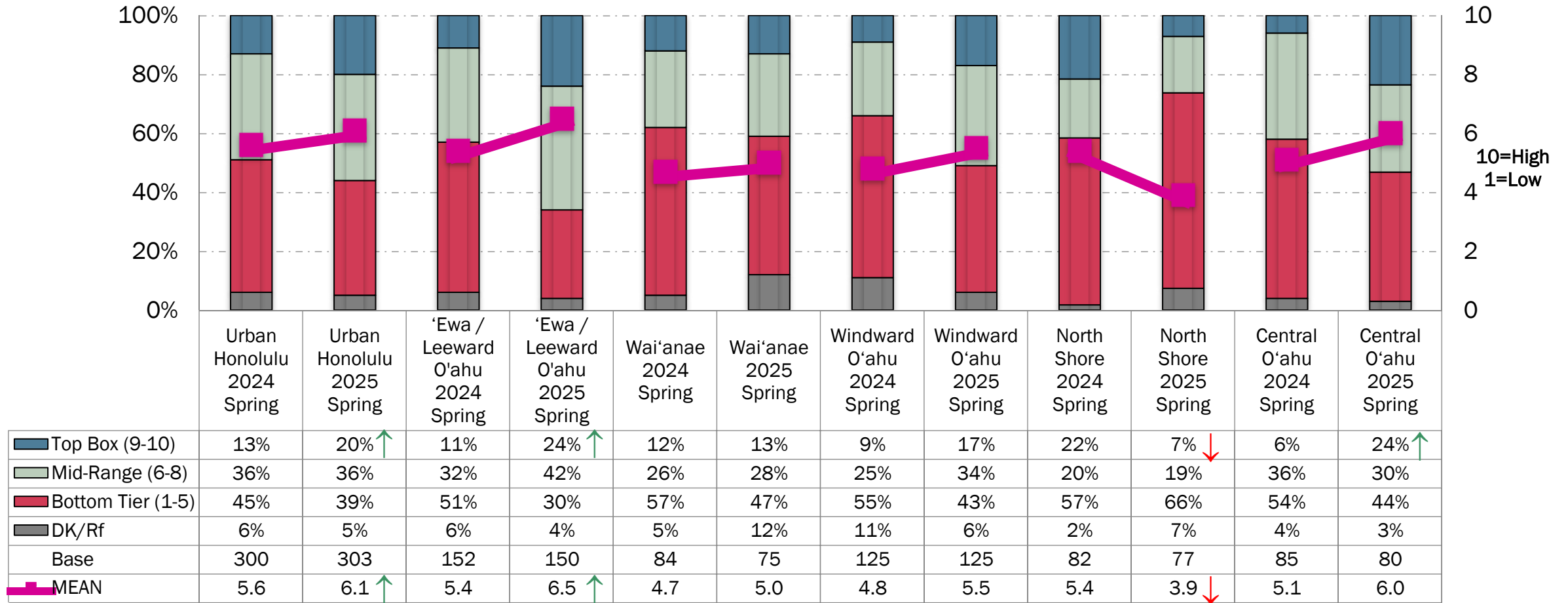
Q4.13 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



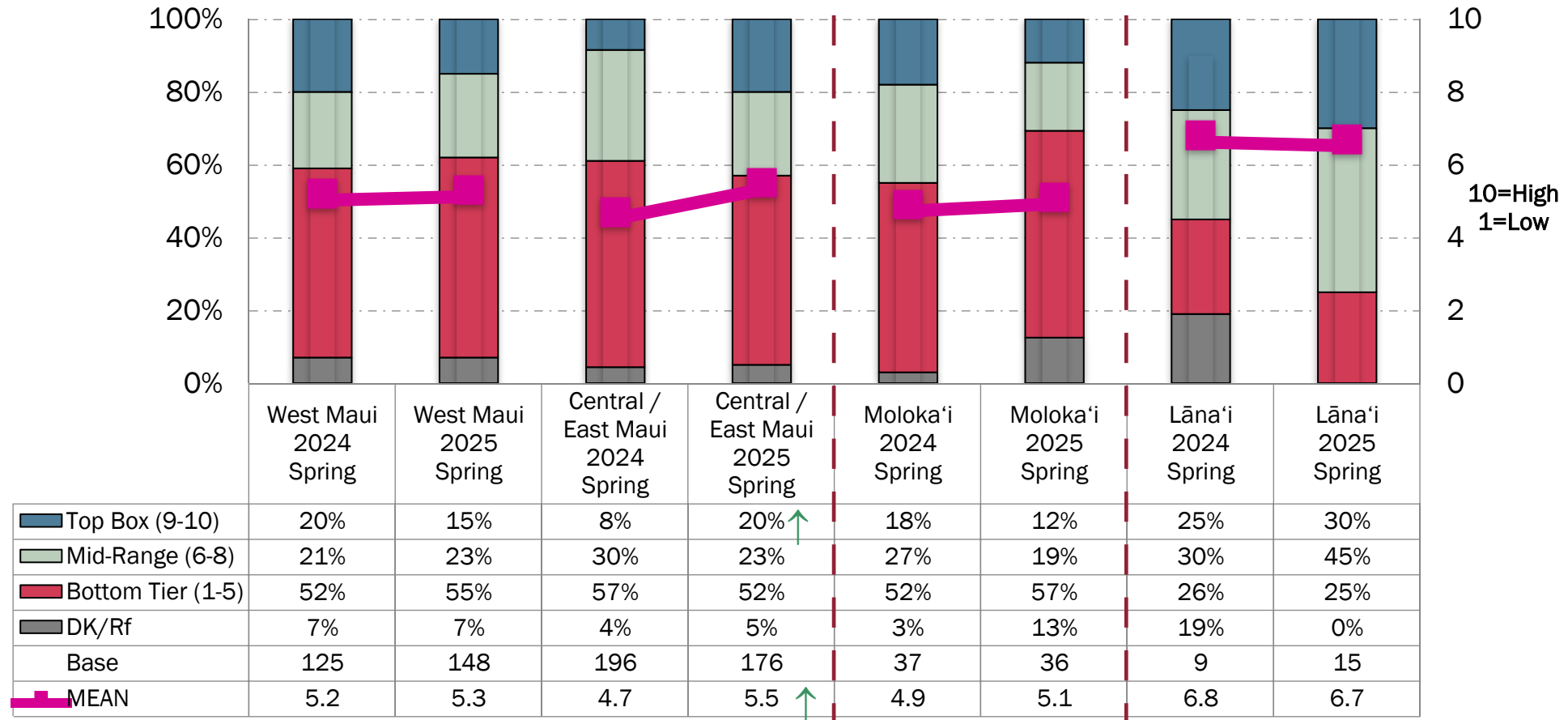
Q4.4 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



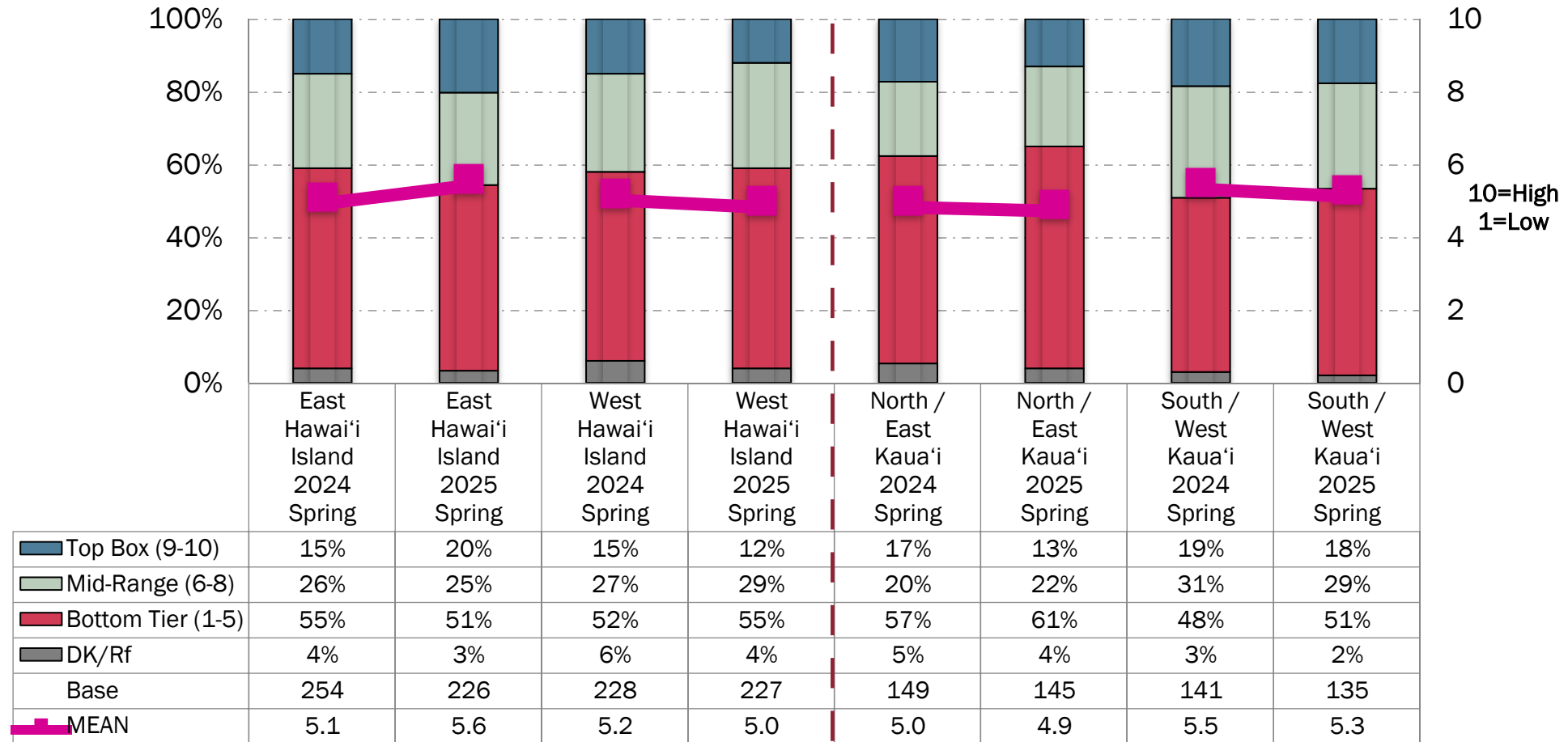
Q4.4 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



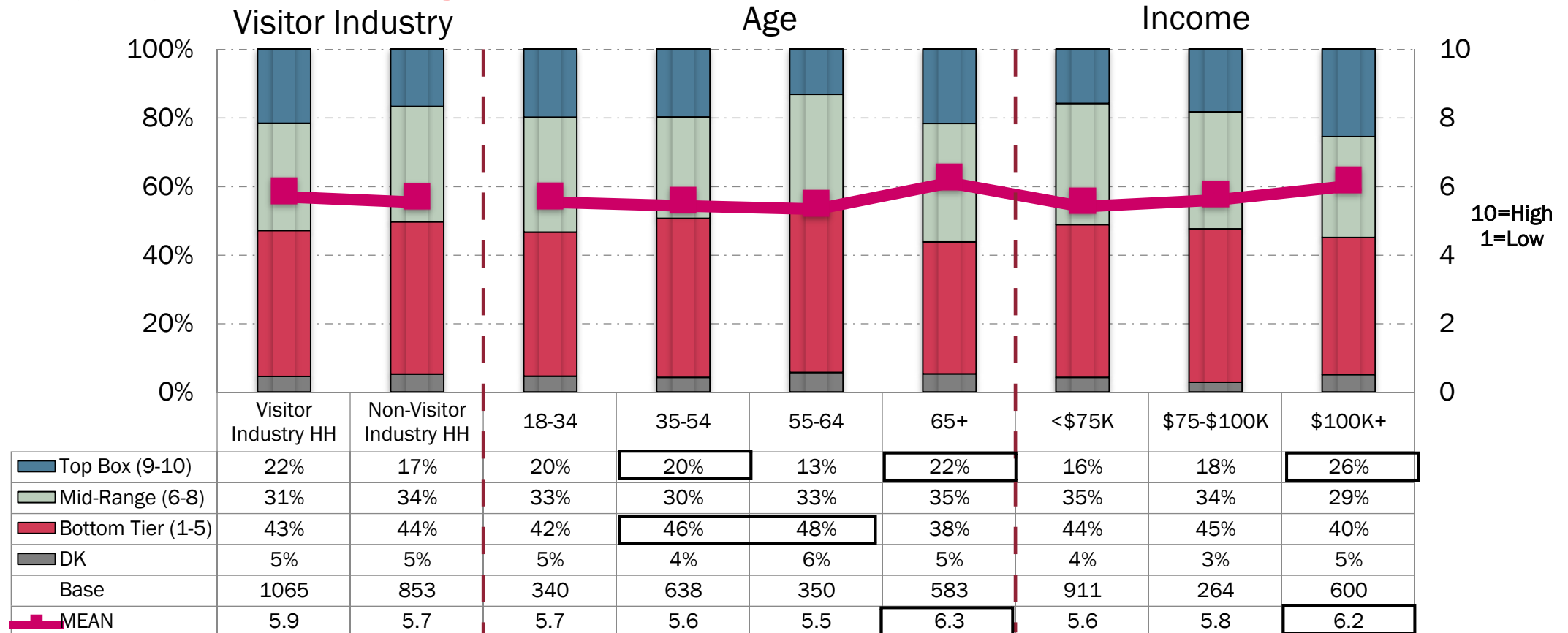
Q4.4 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



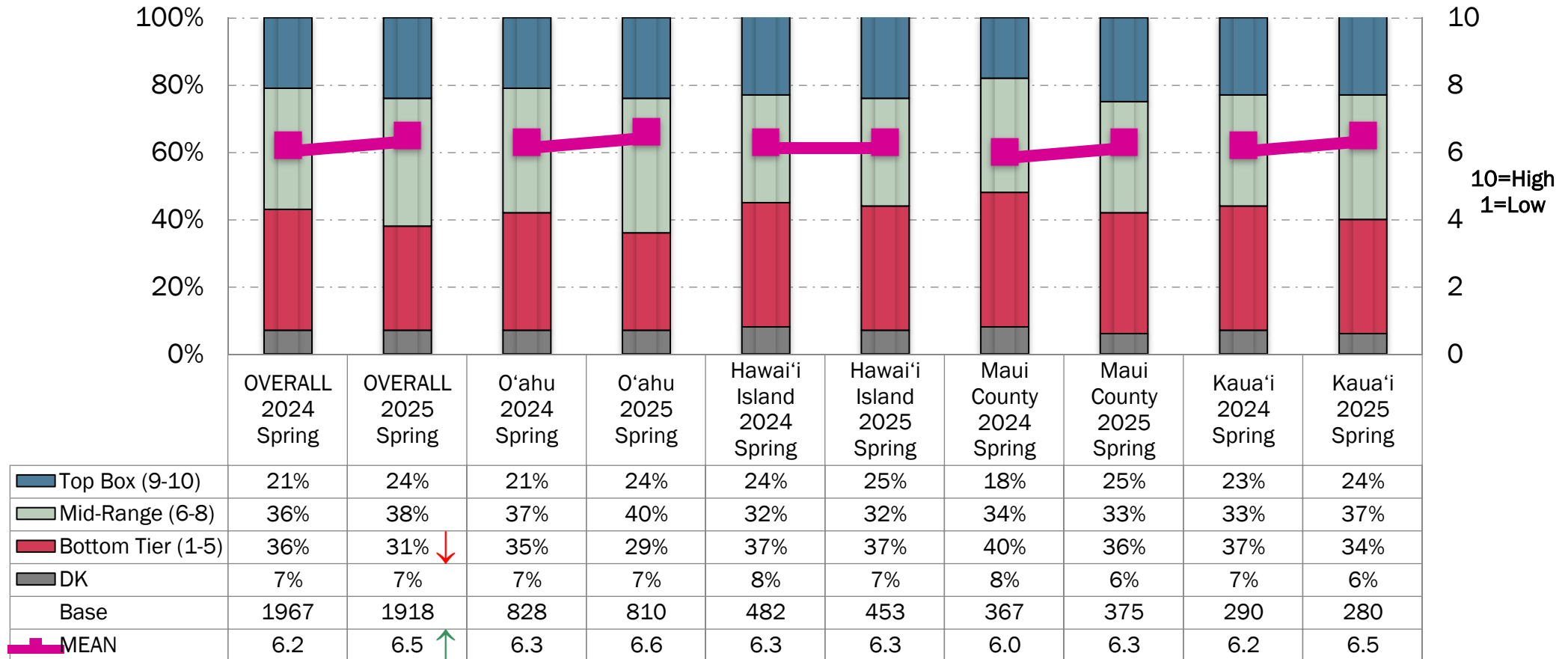
Q4.4 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



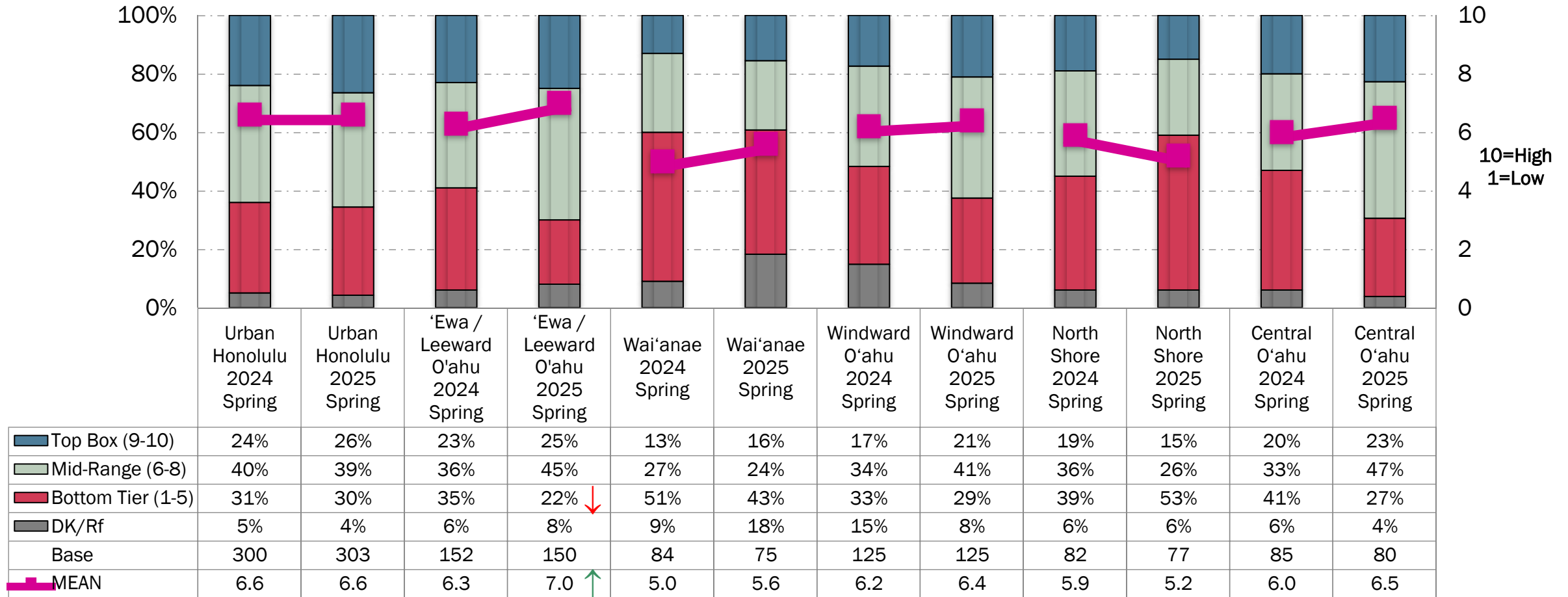
Q4.4 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



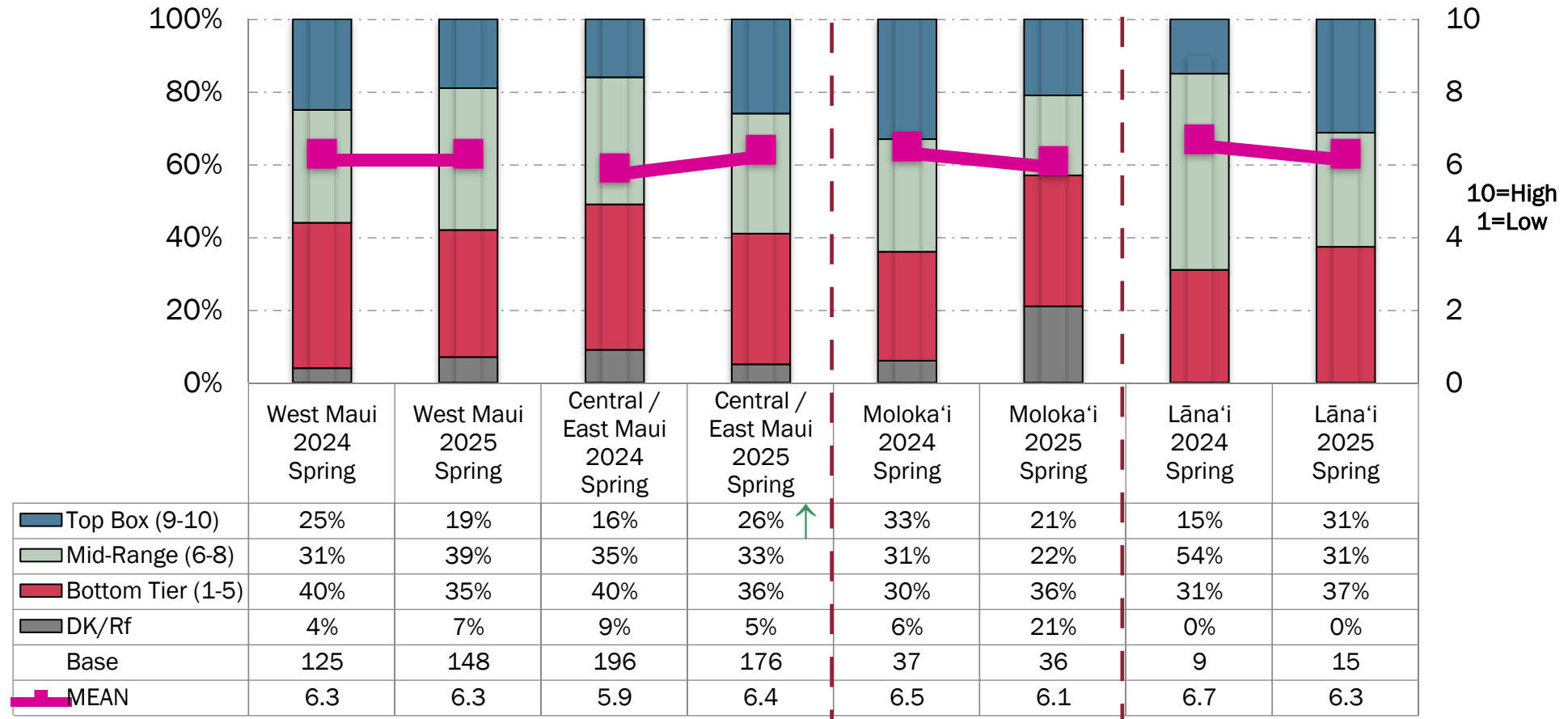
Q4.5 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



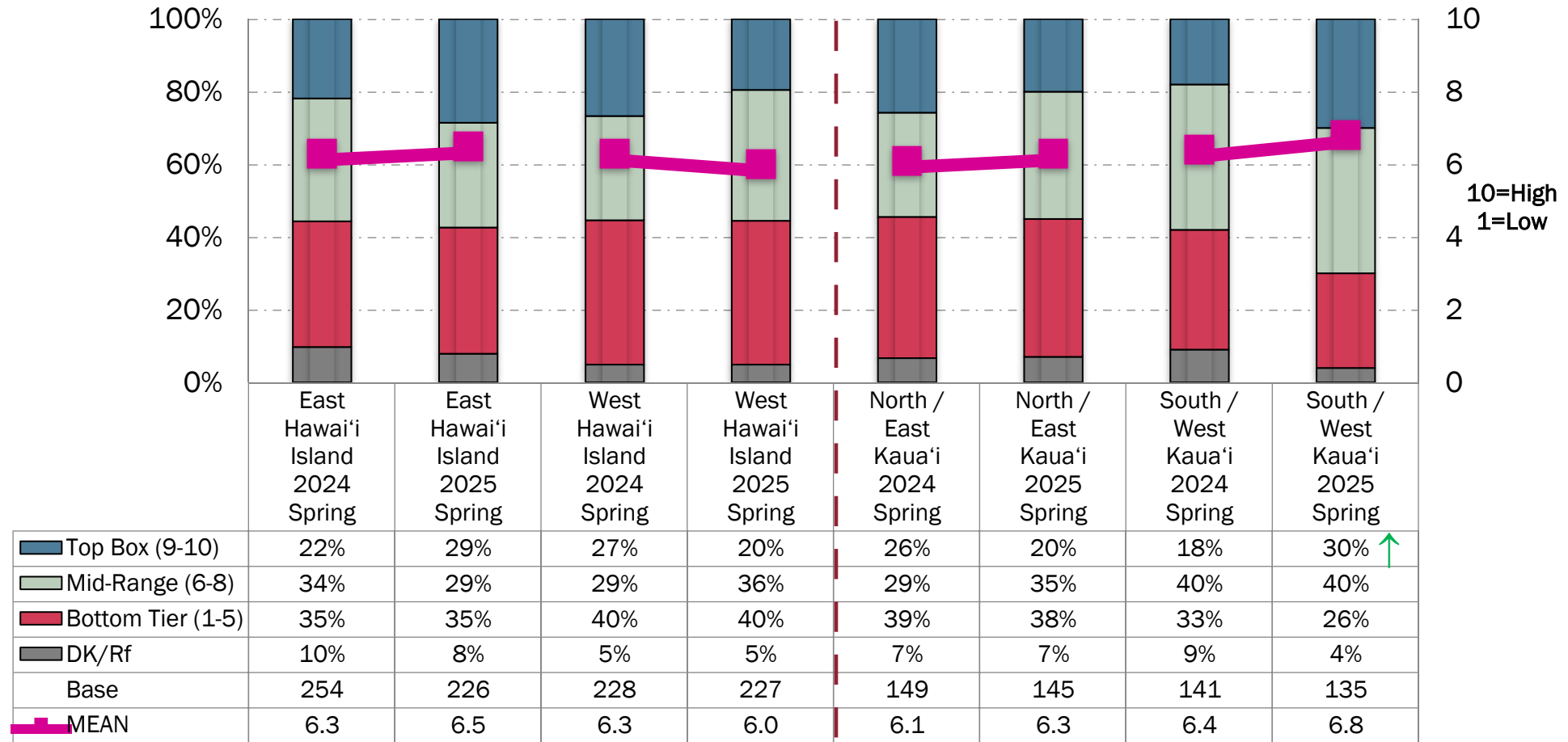
Q4.5 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



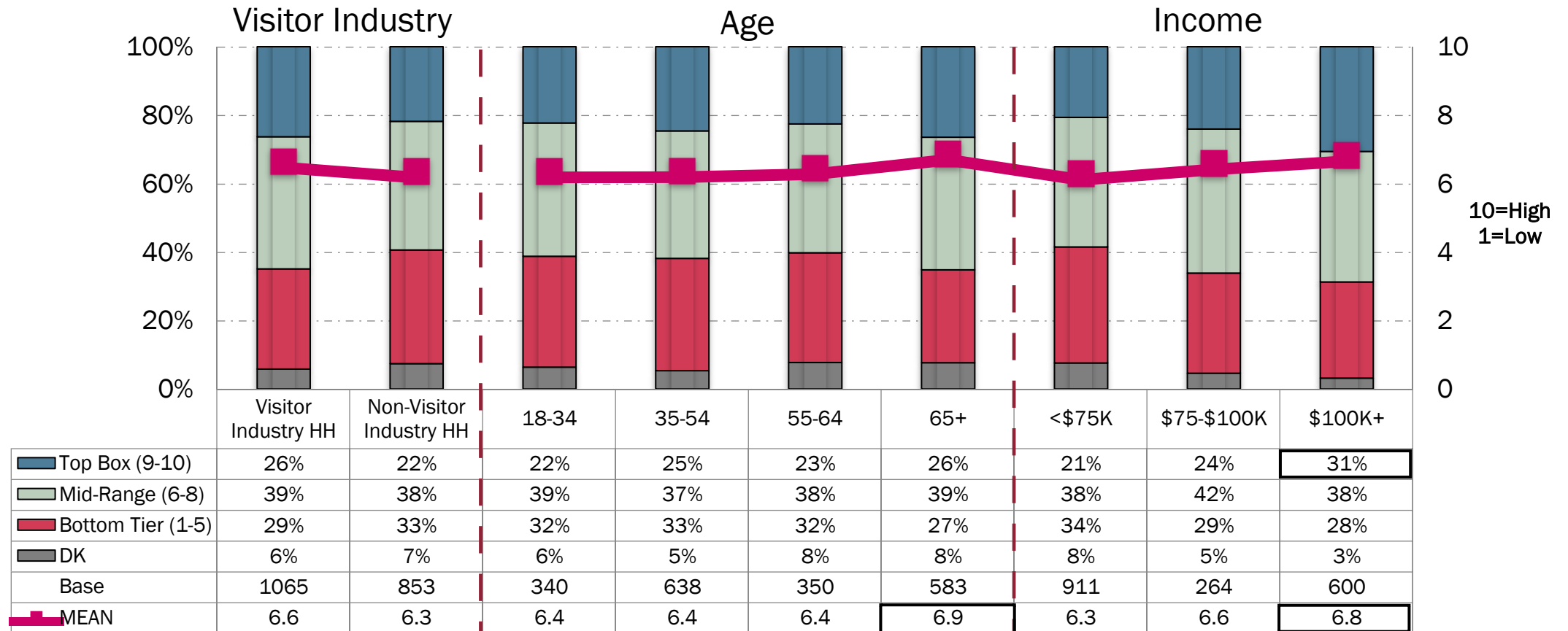
Q4.5 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



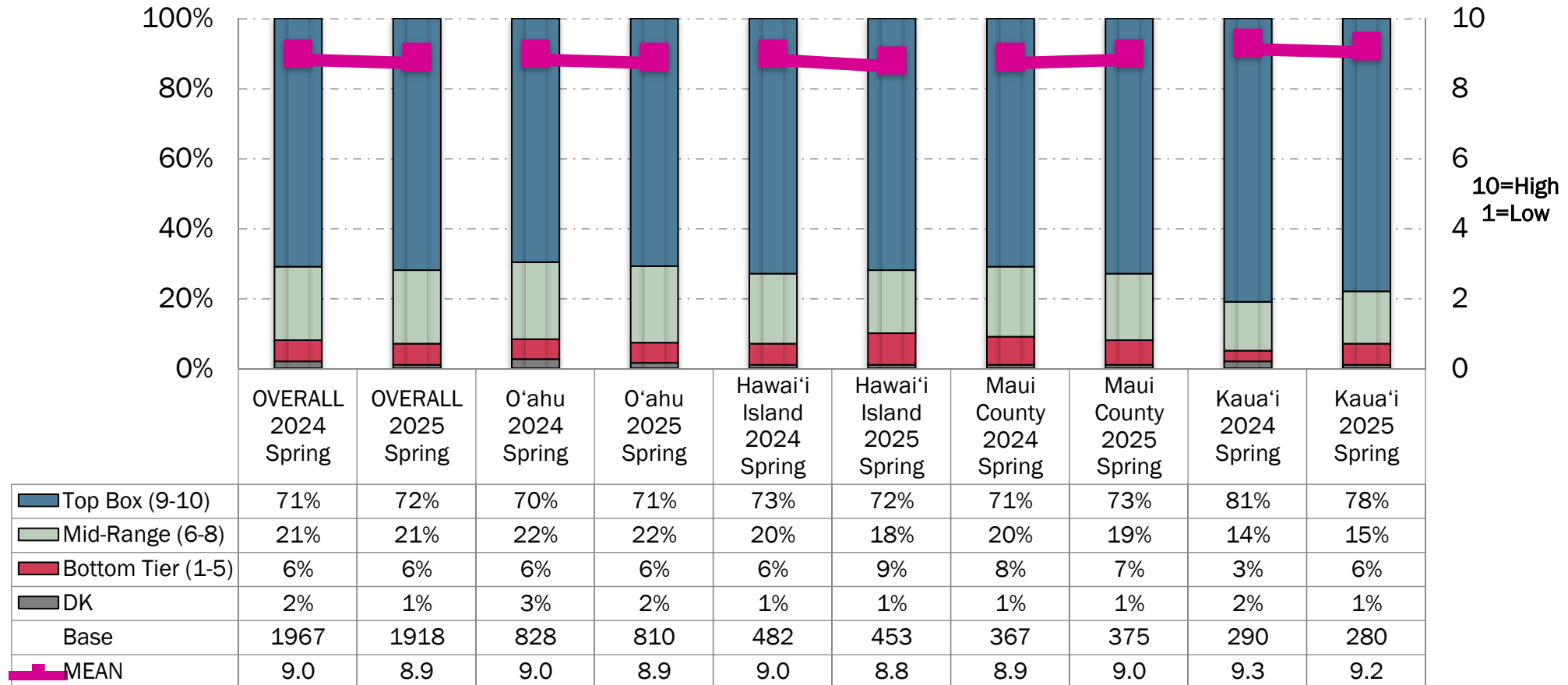
Q4.5 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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...?

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



Q4.19 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...?

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



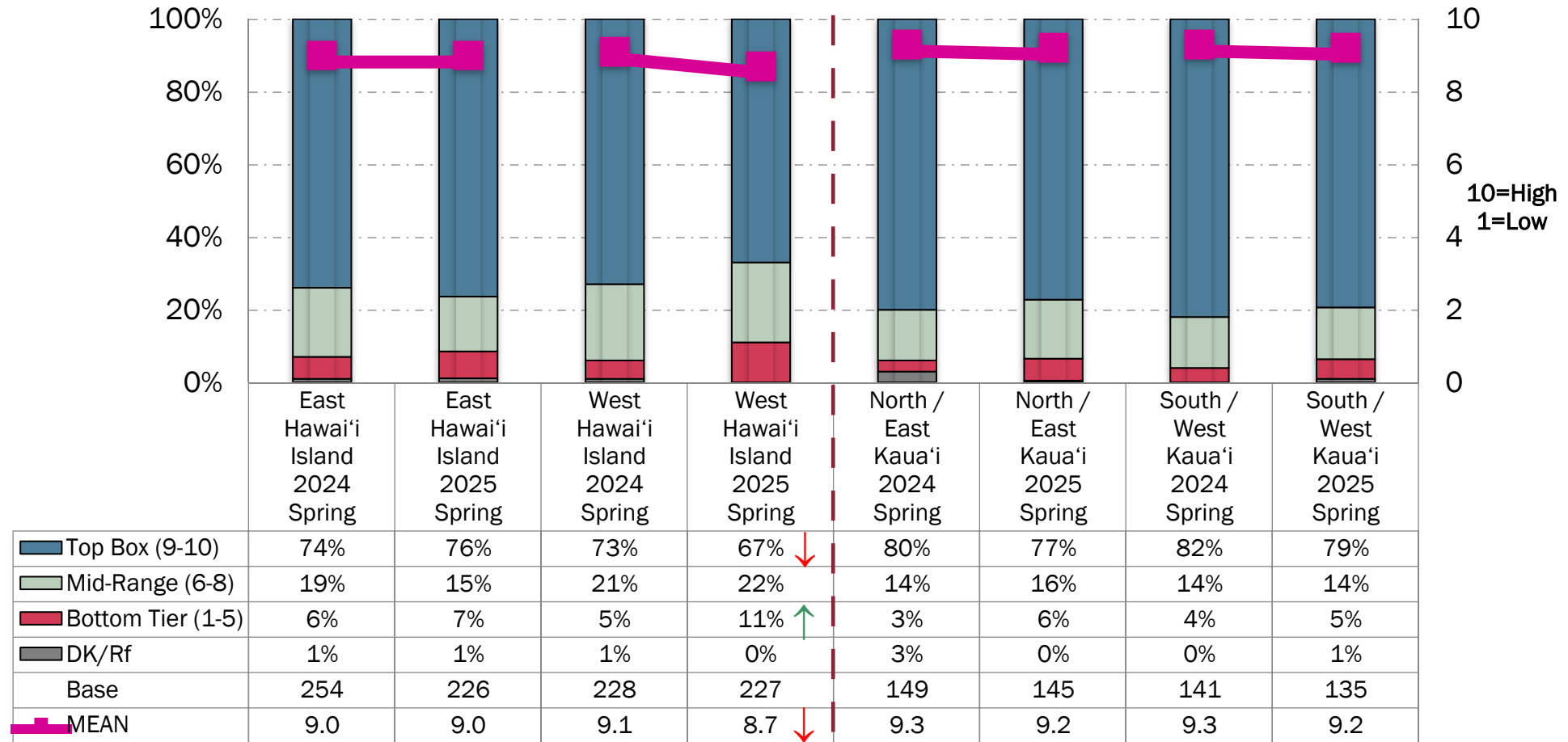
Q4.19 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



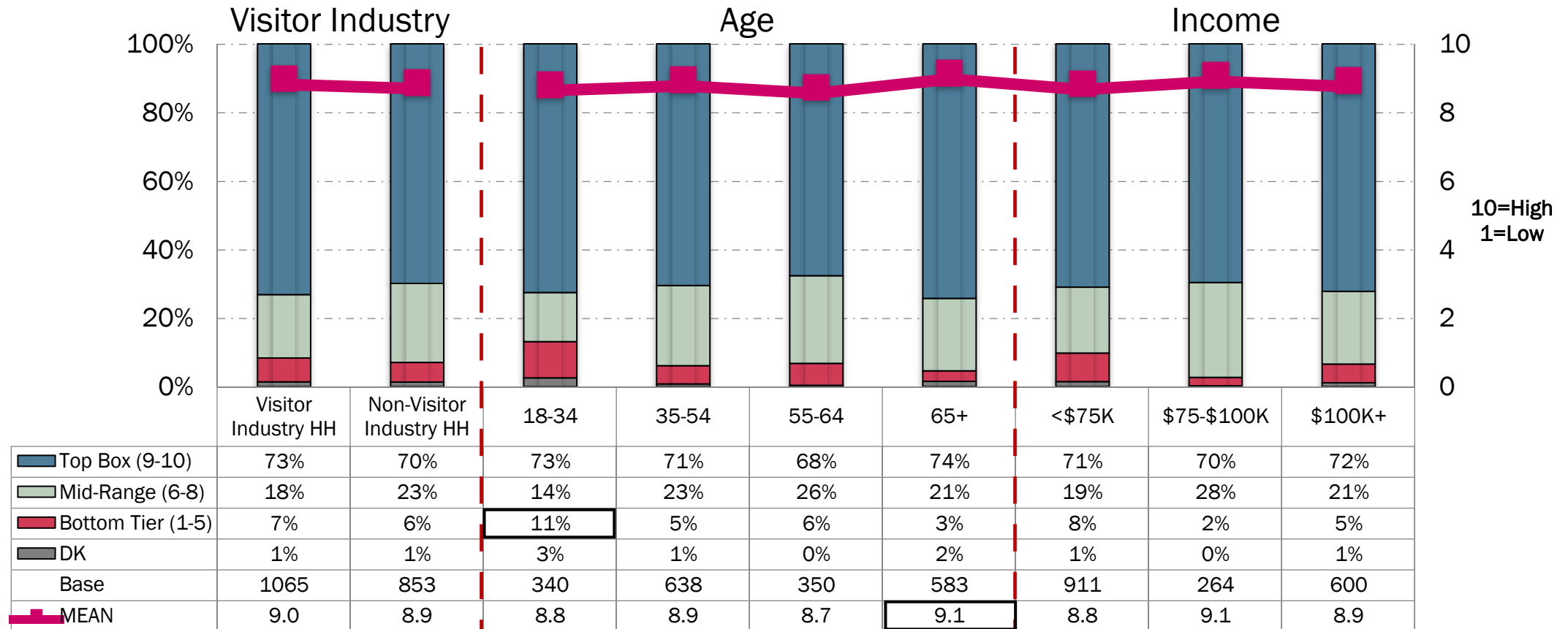
Q4.19 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



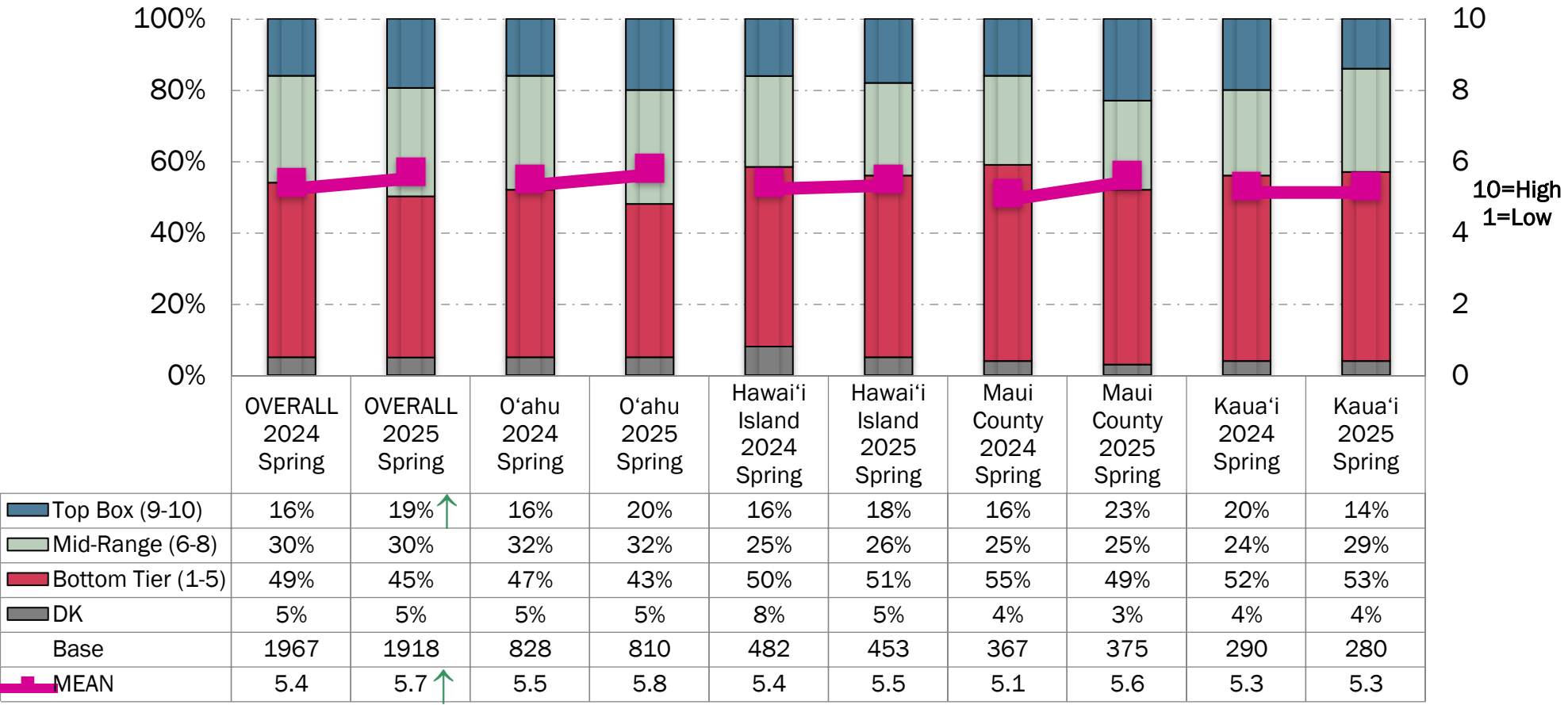
Q4.19 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.19 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 contributes to the improvement and maintenance of the natural resources in my community” – *By County*



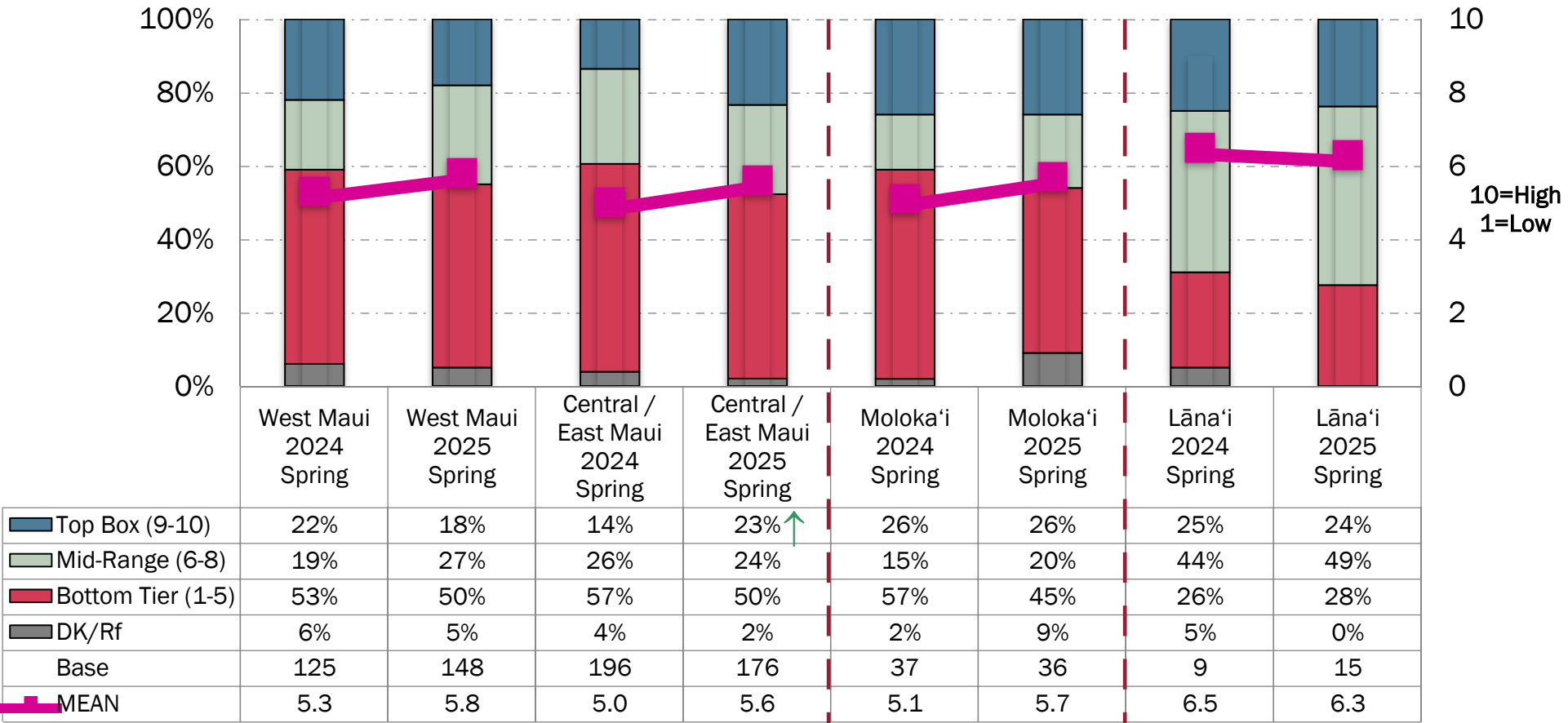
Q4.21 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



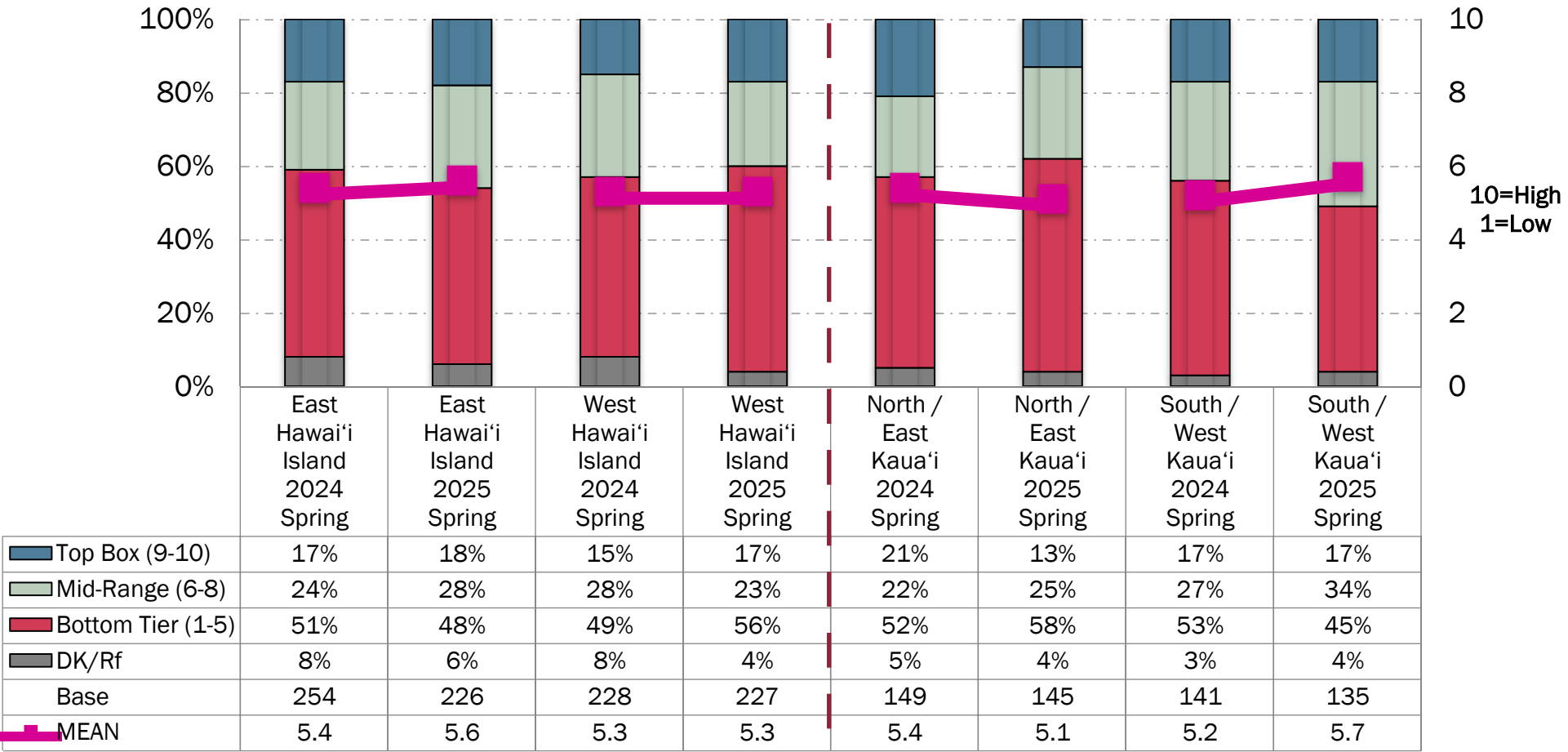
Q4.21 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



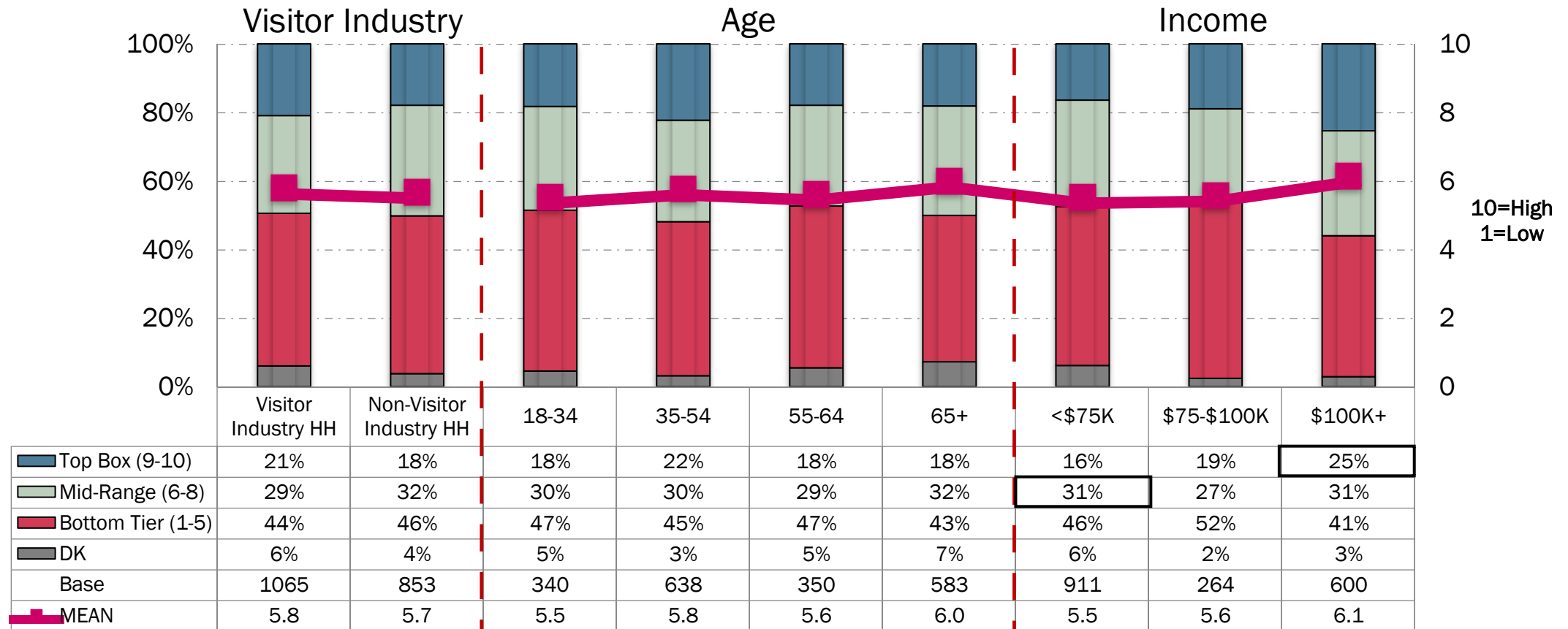
Q4.21 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.21 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 contributes to the improvement and maintenance of the natural resources in my community” – *By Demographics*



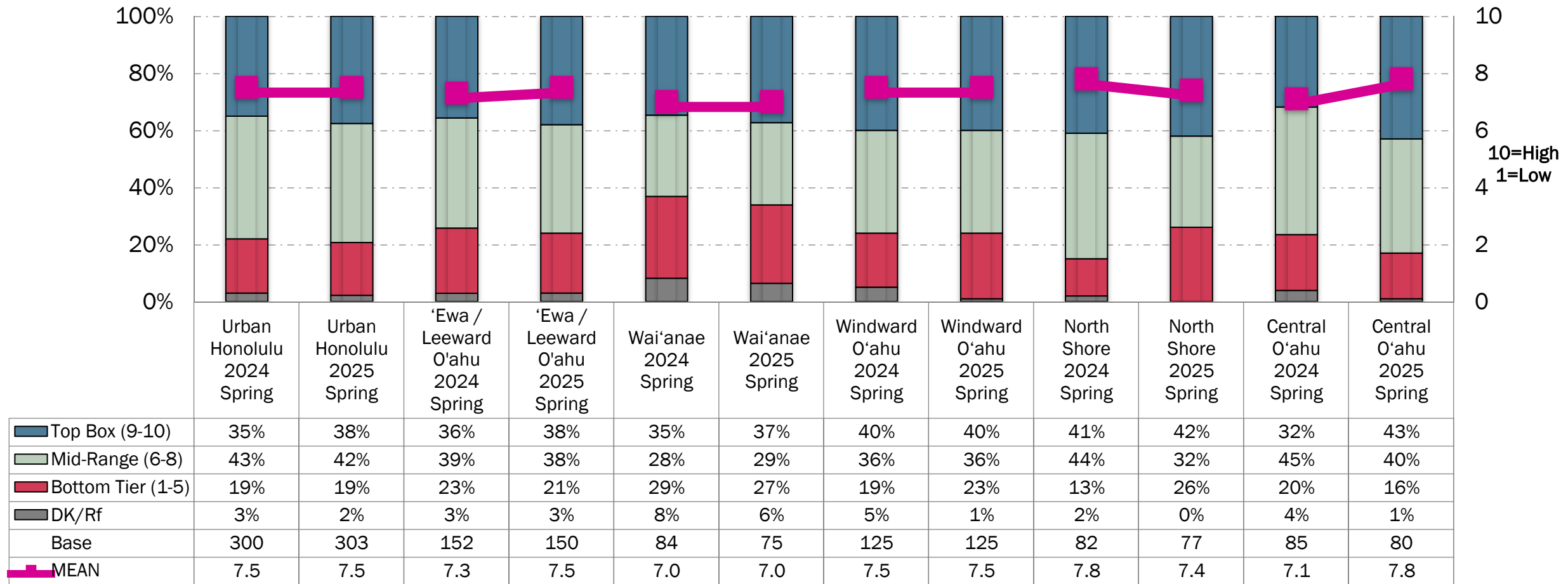
Q4.21 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.22 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 safe when I travel to visitor destinations in Hawai‘i” – *By Area (O‘ahu)*



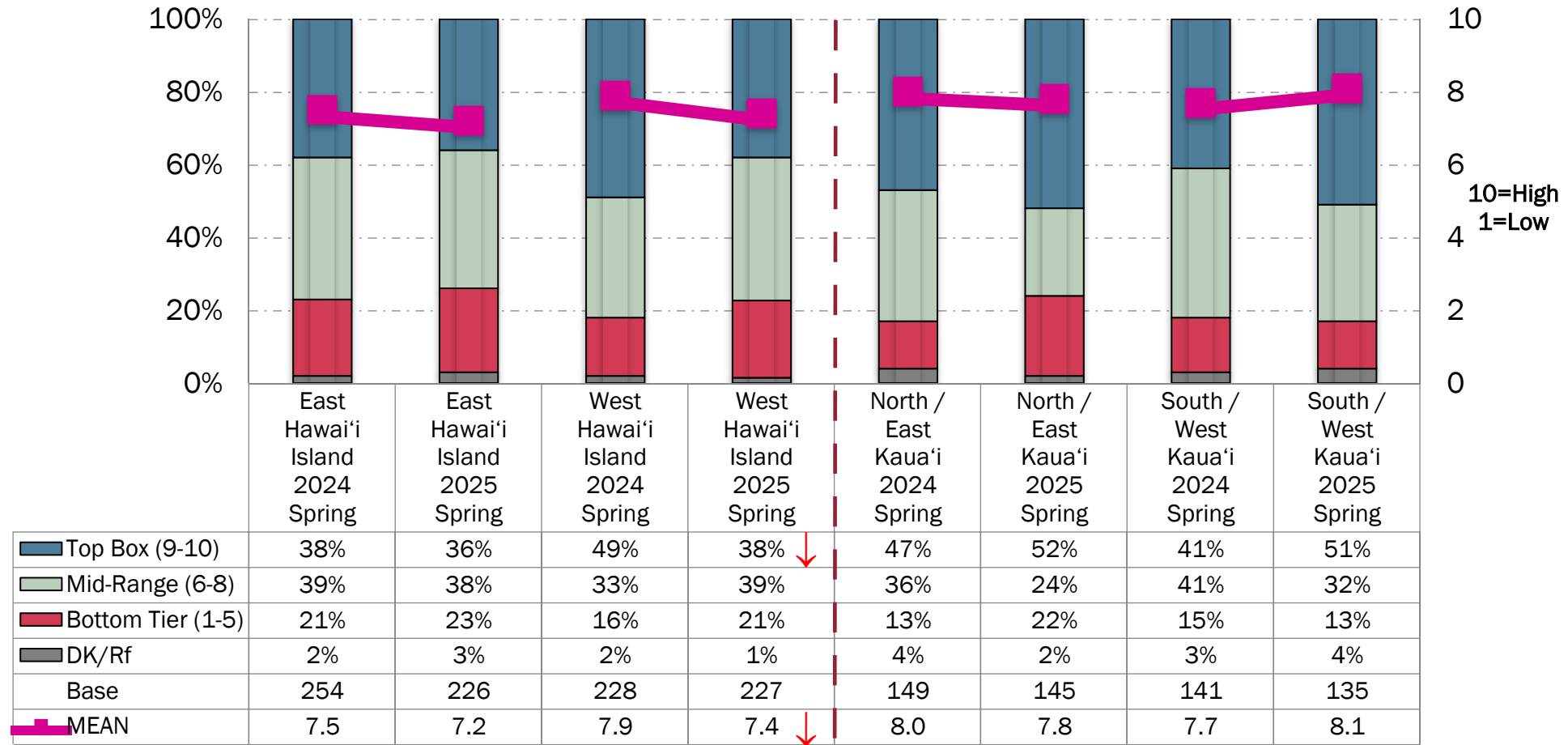
Q4.22 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



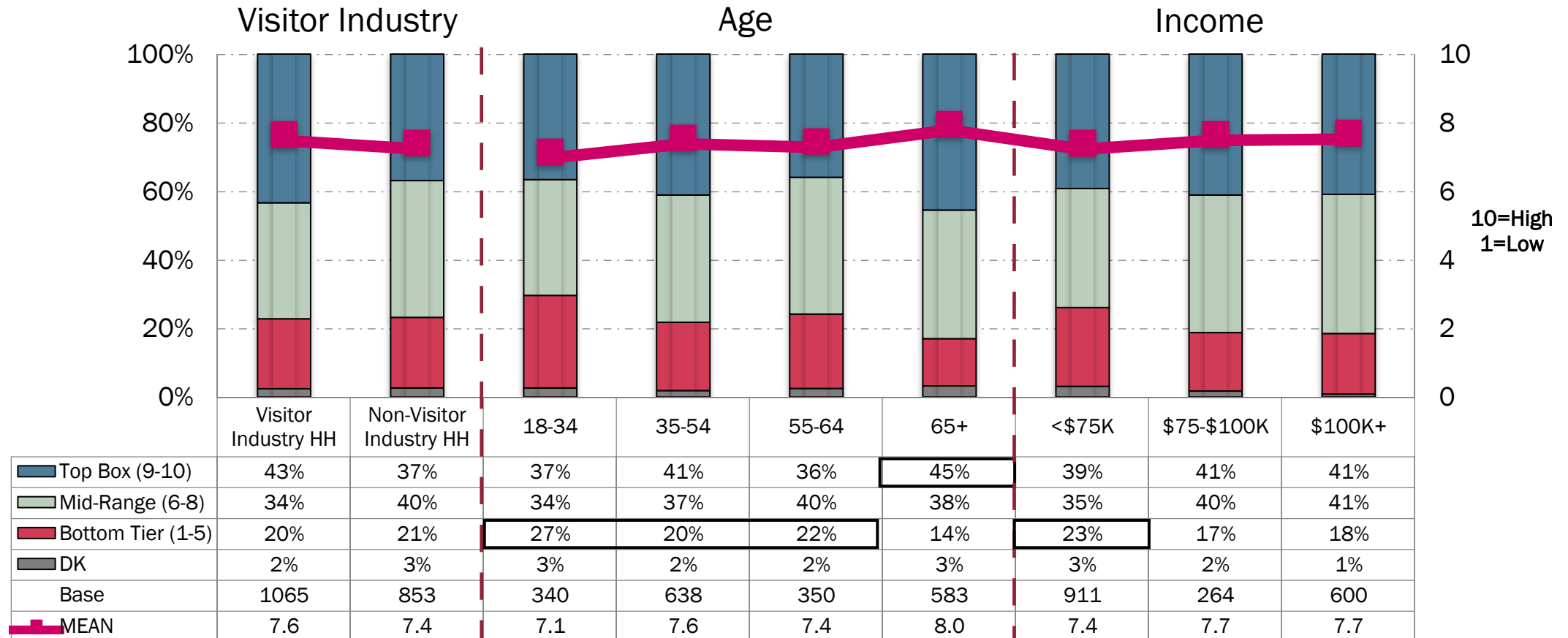
Q4.22 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.22 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 safe when I travel to visitor destinations in Hawai‘i” – *By Demographics*



Q4.22 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...?

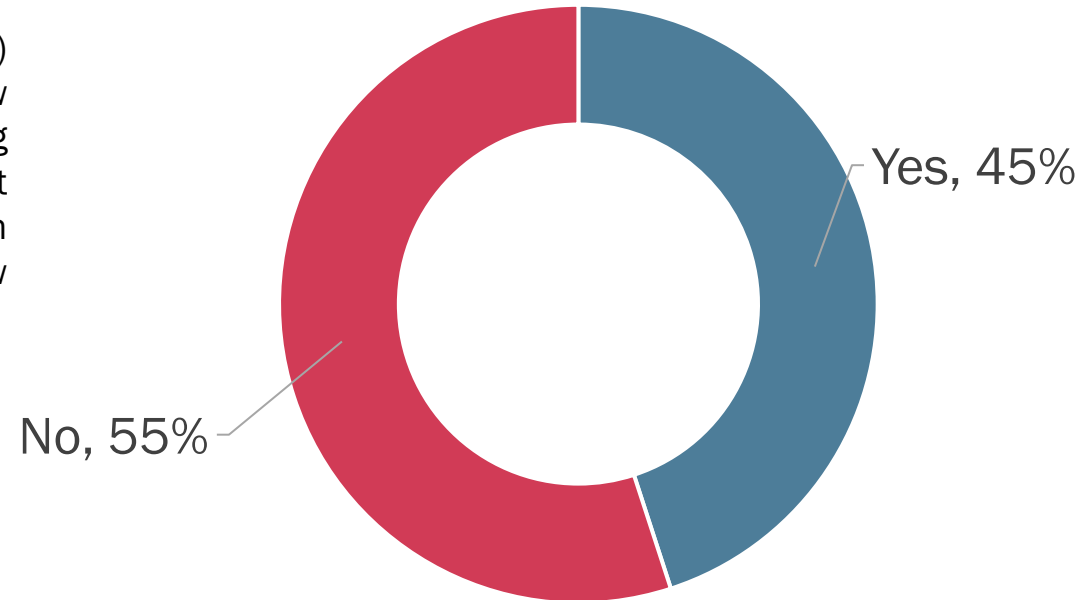
Destination Management Action Plans



Aware of Destination Management Action Plans

Aware of Destination Management Action Plans?

Slightly less than half (45%) of Hawai'i residents know that HTA is pursuing destination management action plans, showing room for broader outreach on how tourism is being managed.

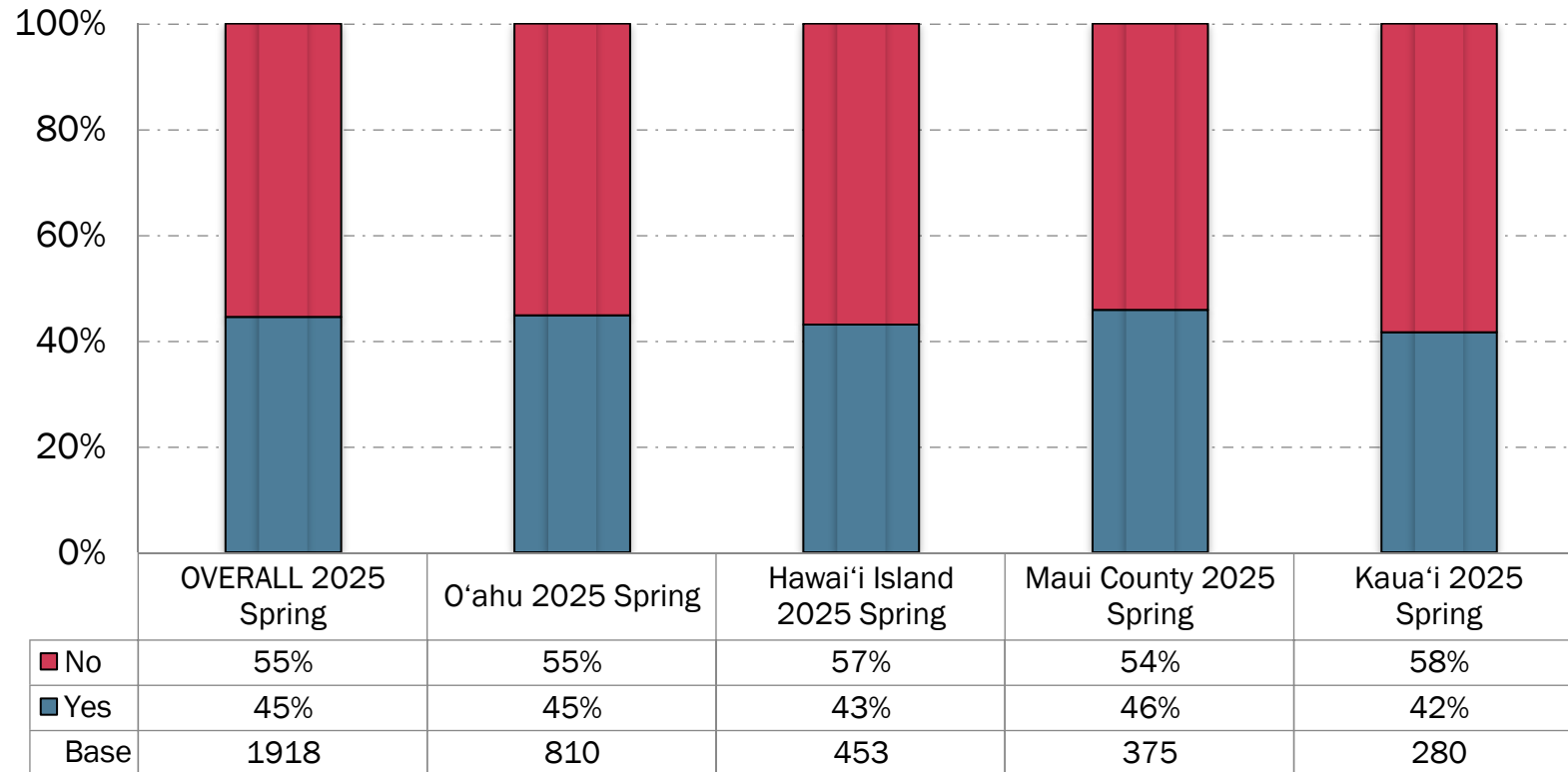


REVISED SPRING 2025: Q10. Destination Management is an approach to developing tourism in a way that produces economic benefits for the community, while minimizing the negative impacts.

Some examples of the Hawai'i Tourism Authority's (HTA) work include implementing pre- and post-arrival marketing/education messaging to our visitors, implementing stewardship programs to protect and conserve natural and cultural resources statewide, and working with community partners to develop, market and support more collaborative, curated experiences that enrich the lives of residents and visitors alike.

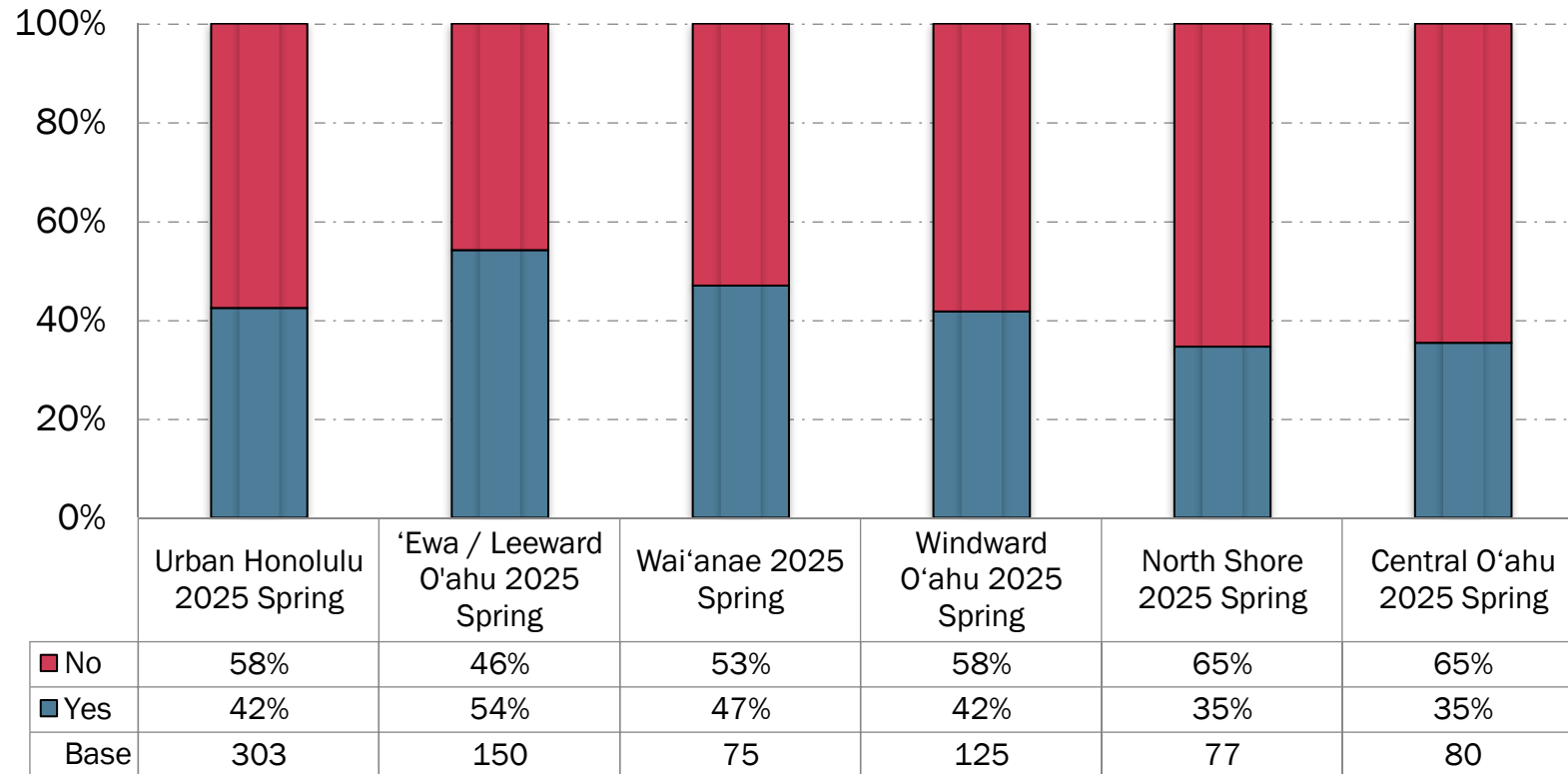
Are you aware that one way the Hawai'i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans? (Base: 1918)

“Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state through its Destination Management Action Plans” – *By County*



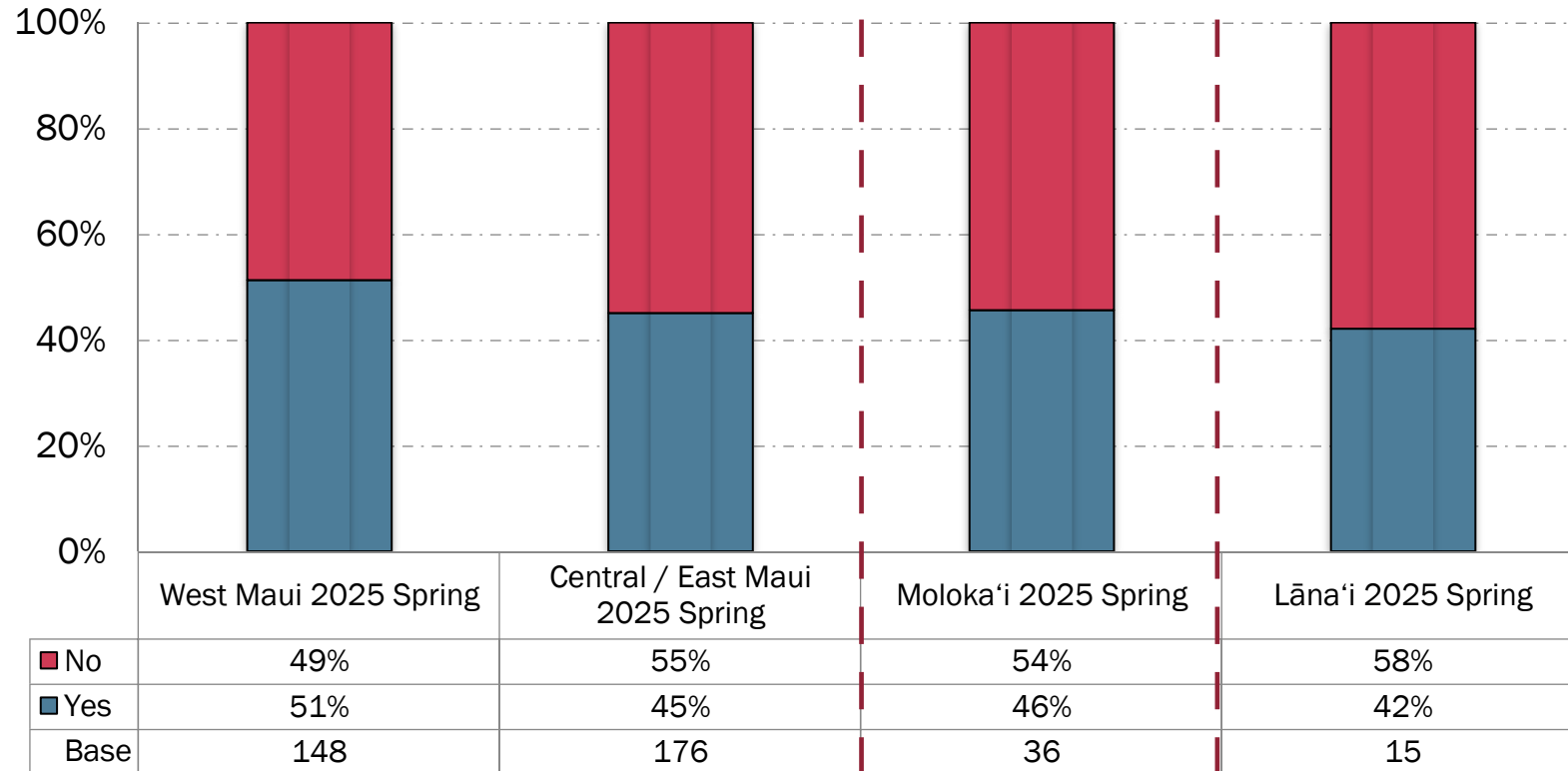
REVISED SPRING 2025: Q10. Are you aware that one way the Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans?

“Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans” – *By O‘ahu Area*



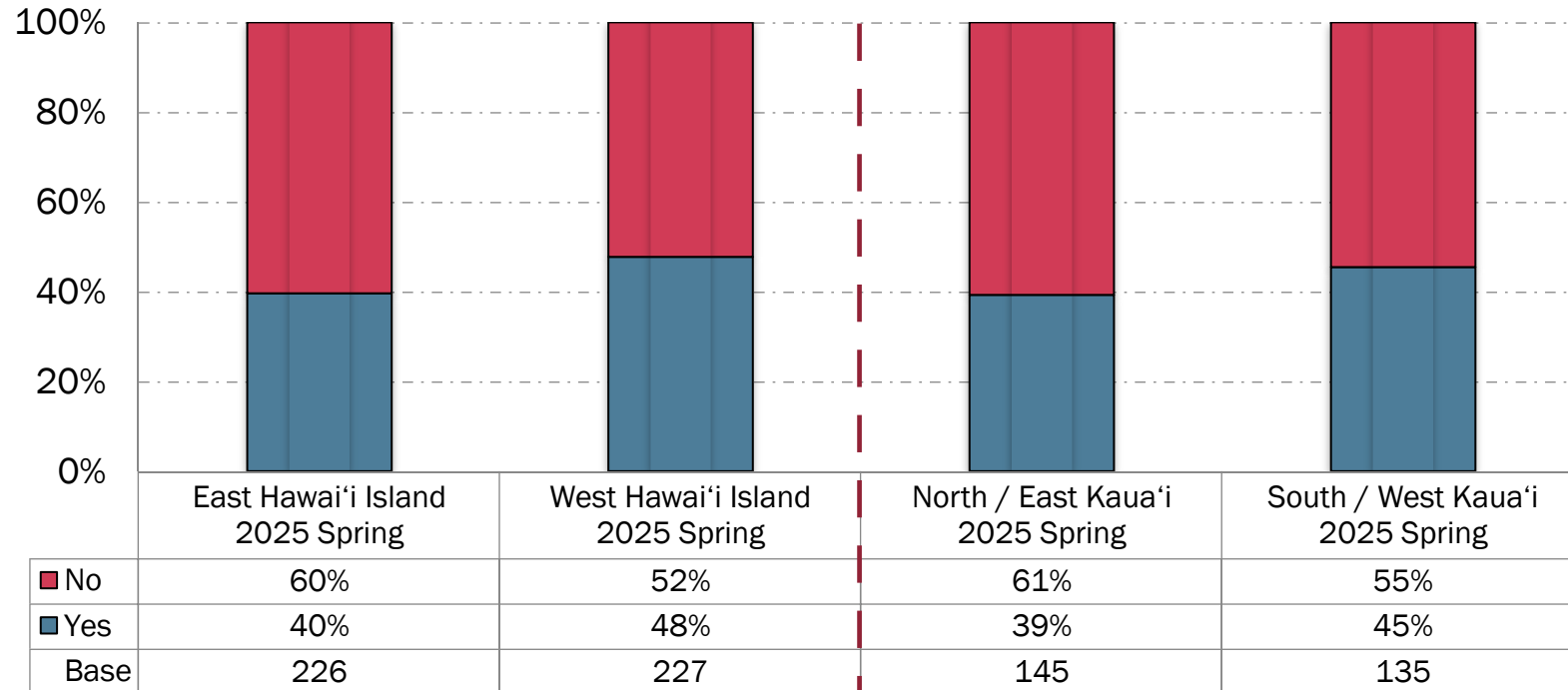
REVISED SPRING 2025: Q10. Are you aware that one way the Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans?

“Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans” – *By Area (Maui County)*



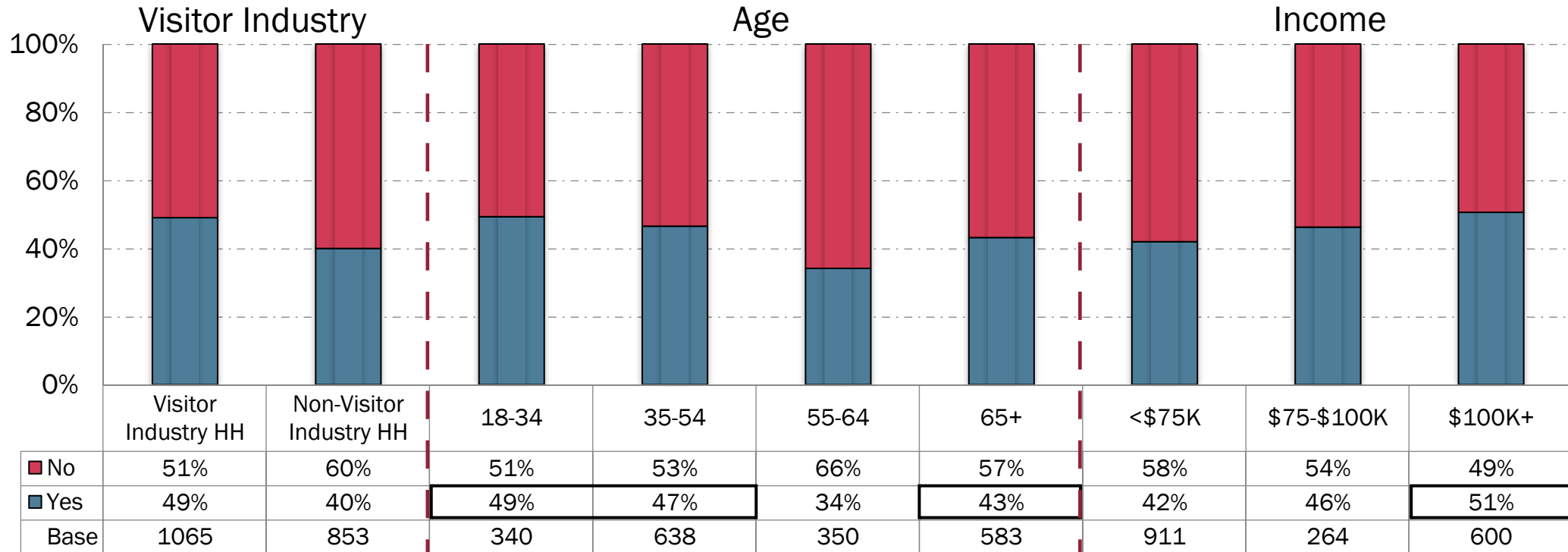
REVISED SPRING 2025: Q10. Are you aware that one way the Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans?

“Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans” –
By Area (Hawai‘i Island and Kaua‘i)



REVISED SPRING 2025: Q10. Are you aware that one way the Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans?

“Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans” – *By Demographics*

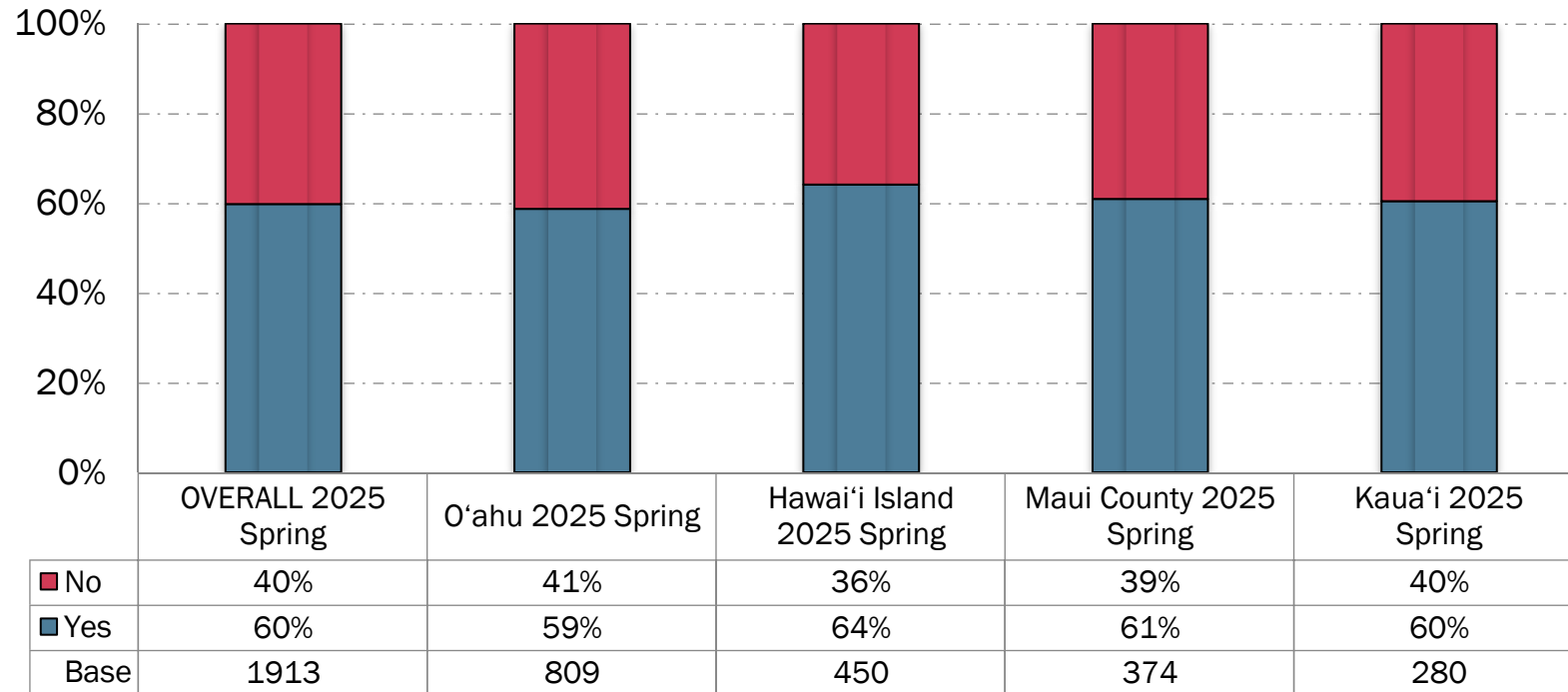


REVISED SPRING 2025: Q10. Are you aware that one way the Hawai‘i Tourism Authority (HTA) actively works to manage tourism in our state is through its Destination Management Action Plans?

Economic Diversification

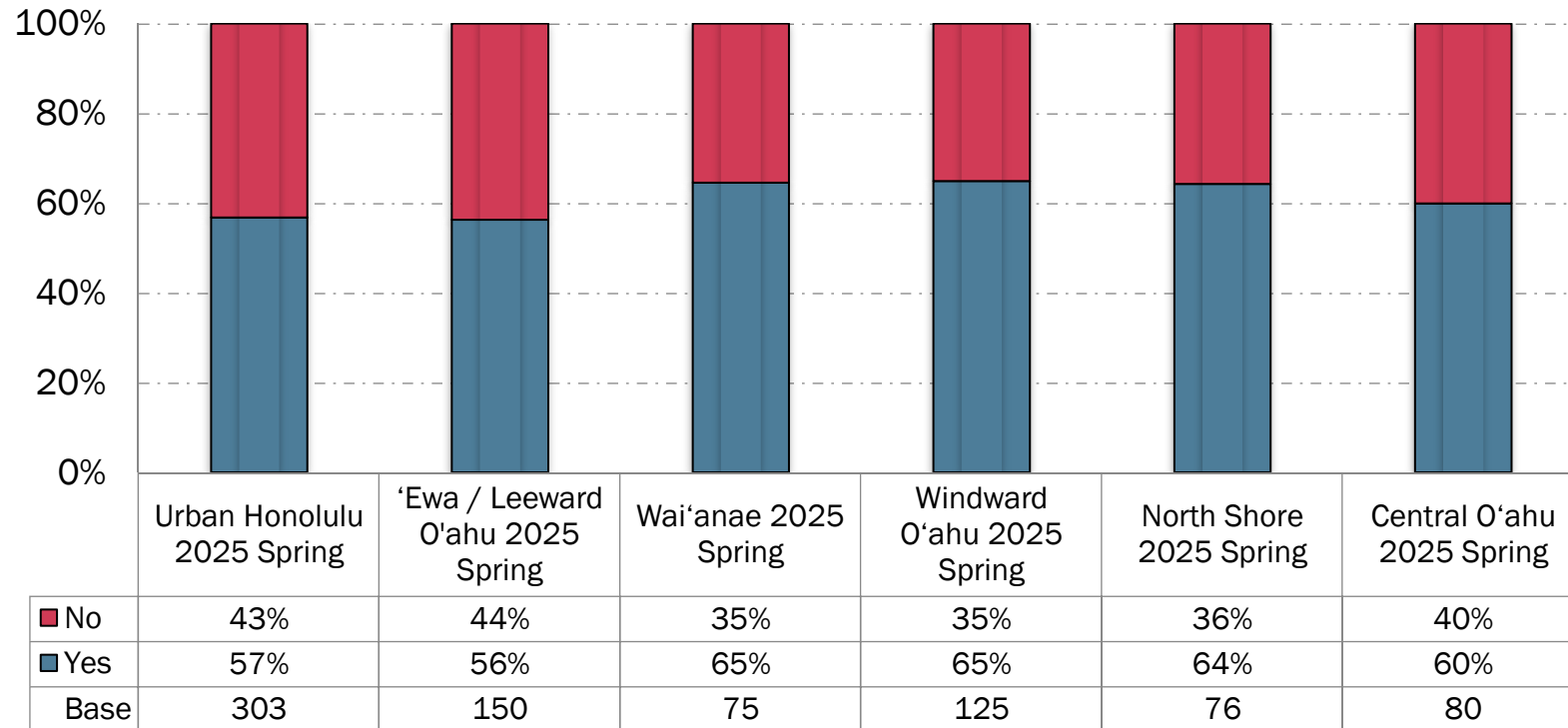


“Other Than Tourism Should Hawai‘i Invest in Other Industries” – *By County*



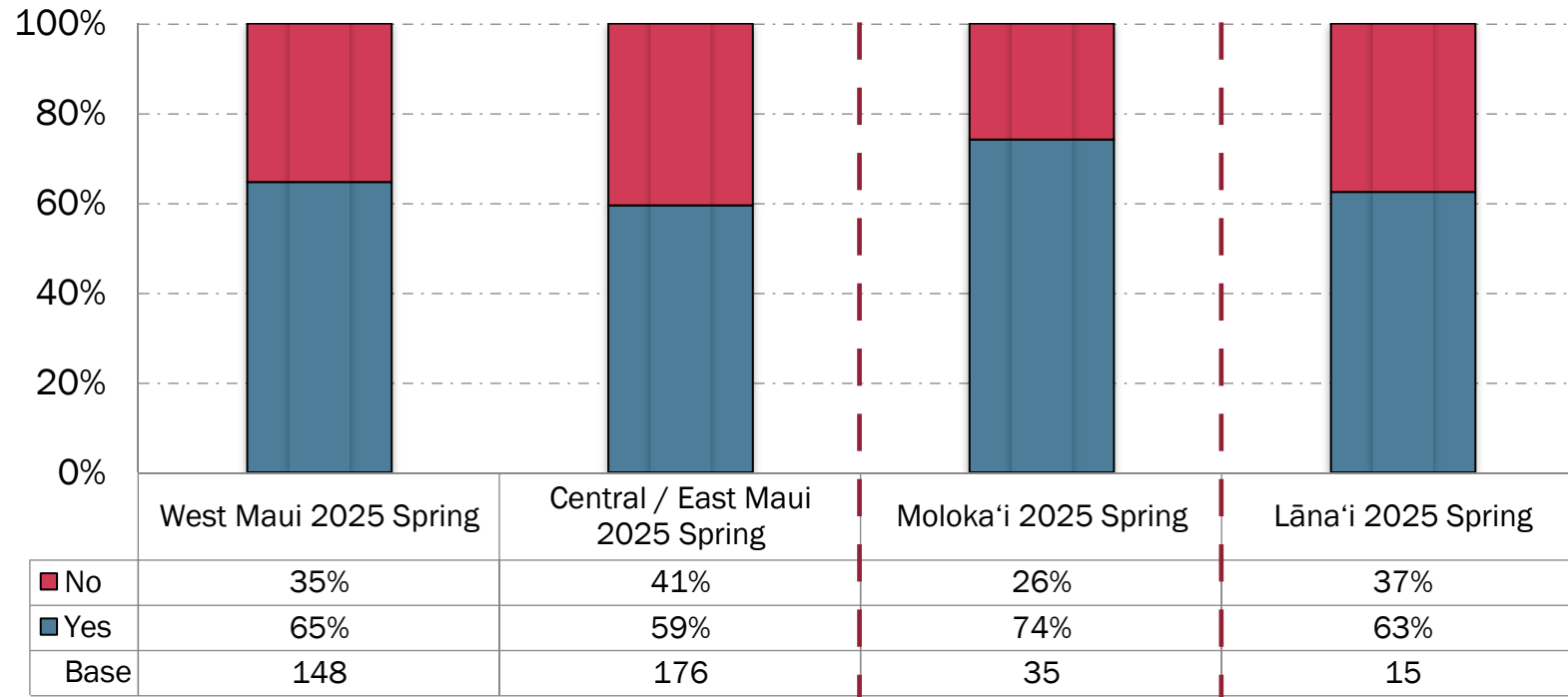
NEW SPRING 2025: Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

“Other Than Tourism Should Hawai‘i Invest in Other Industries” – *By O‘ahu Area*



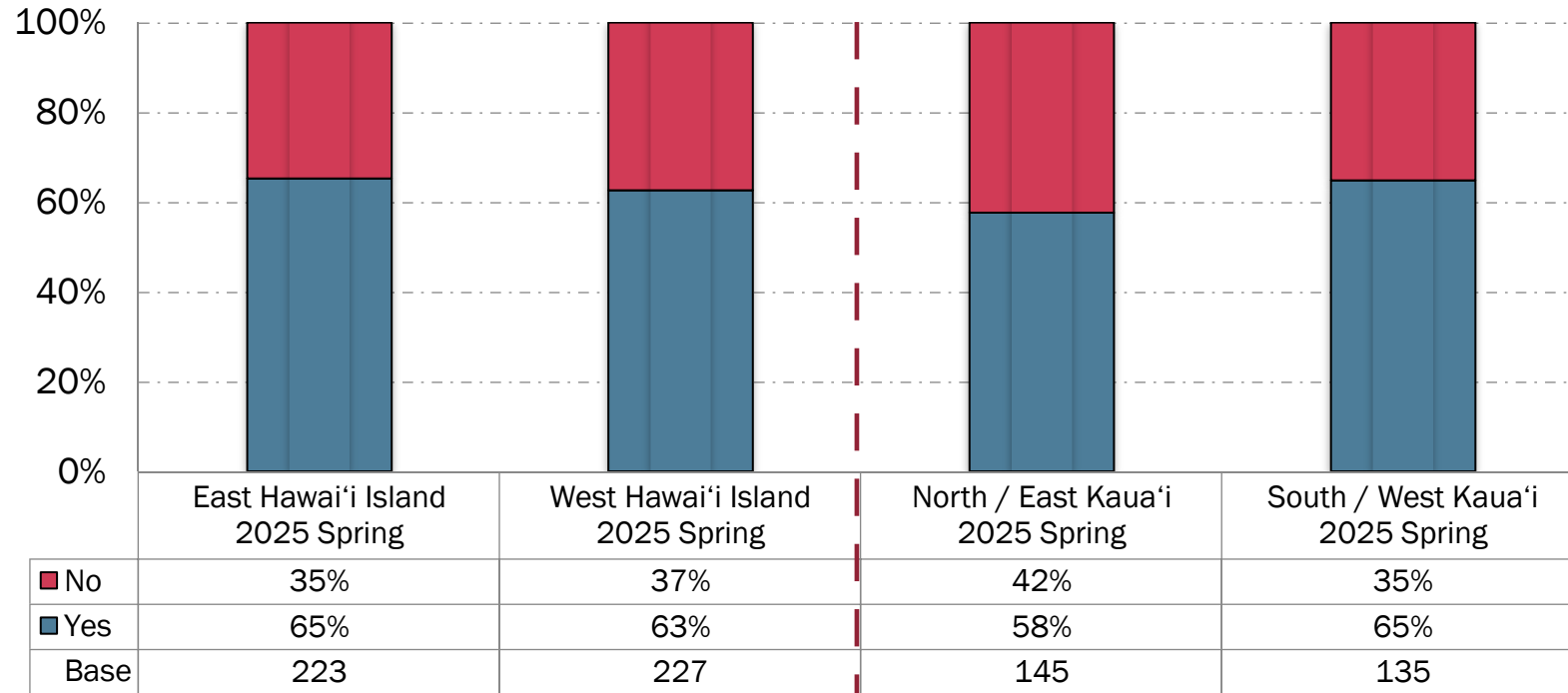
NEW SPRING 2025: Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

“Other Than Tourism Should Hawai‘i Invest in Other Industries” – *By Area (Maui County)*



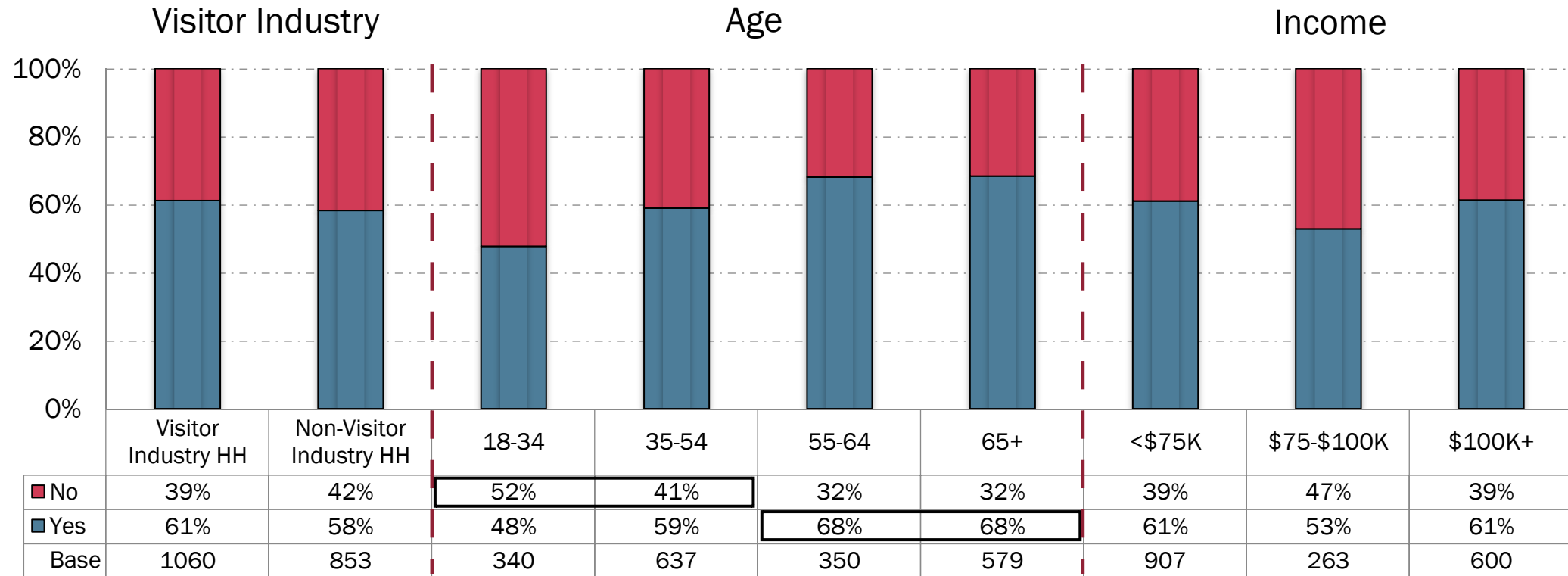
NEW SPRING 2025: Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

“Other Than Tourism Should Hawai‘i Invest in Other Industries” – *By Area (Hawai‘i Island and Kaua‘i)*



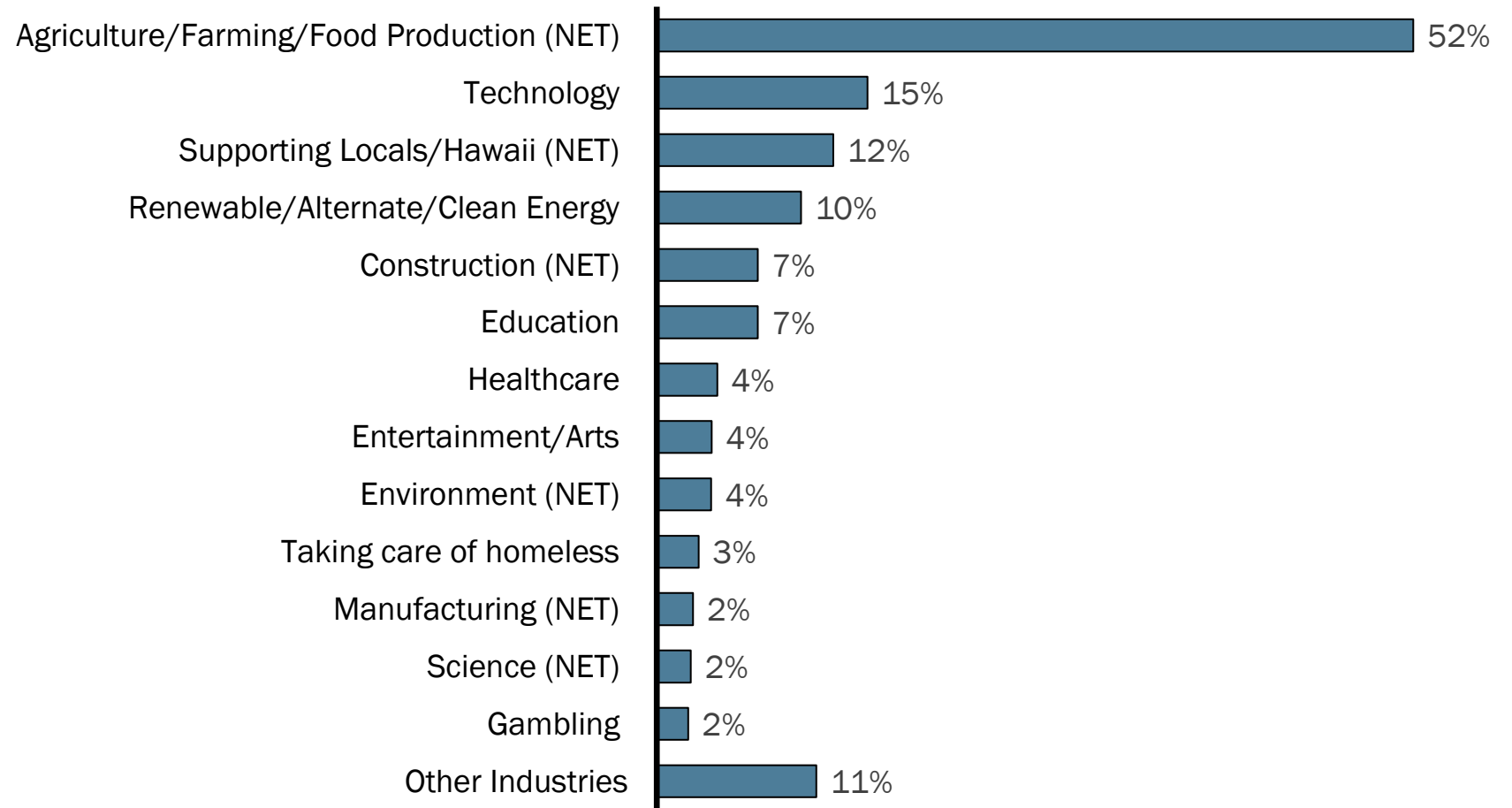
NEW SPRING 2025: Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

“Other Than Tourism Should Hawai‘i Invest in Other Industries” – *By Demographics*



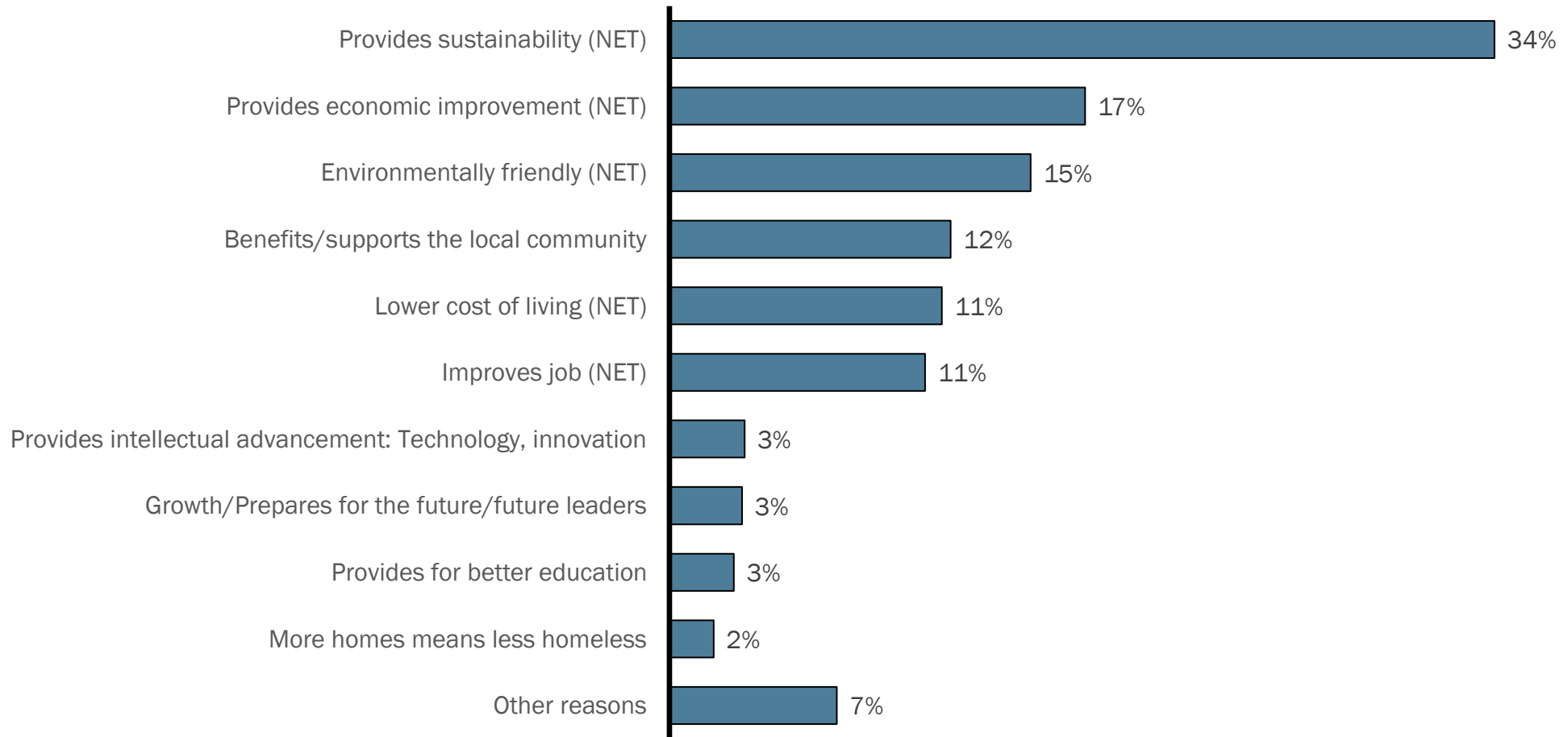
NEW SPRING 2025: Q12. Hawai‘i’s Department of Business, Economic Development and Tourism (DBEDT) works to make the state’s economy more diverse and sustainable. In your opinion, is there another industry other than tourism which Hawai‘i should be investing resources in?

What other Industries should Hawai'i Invest in?



NEW SPRING 2025: Q12A. In your opinion, you feel that there is another industry which Hawai'i should be investing resources in. What would that other industry be? Any others? (Base: 1194)

Factors for Investing in other Industries

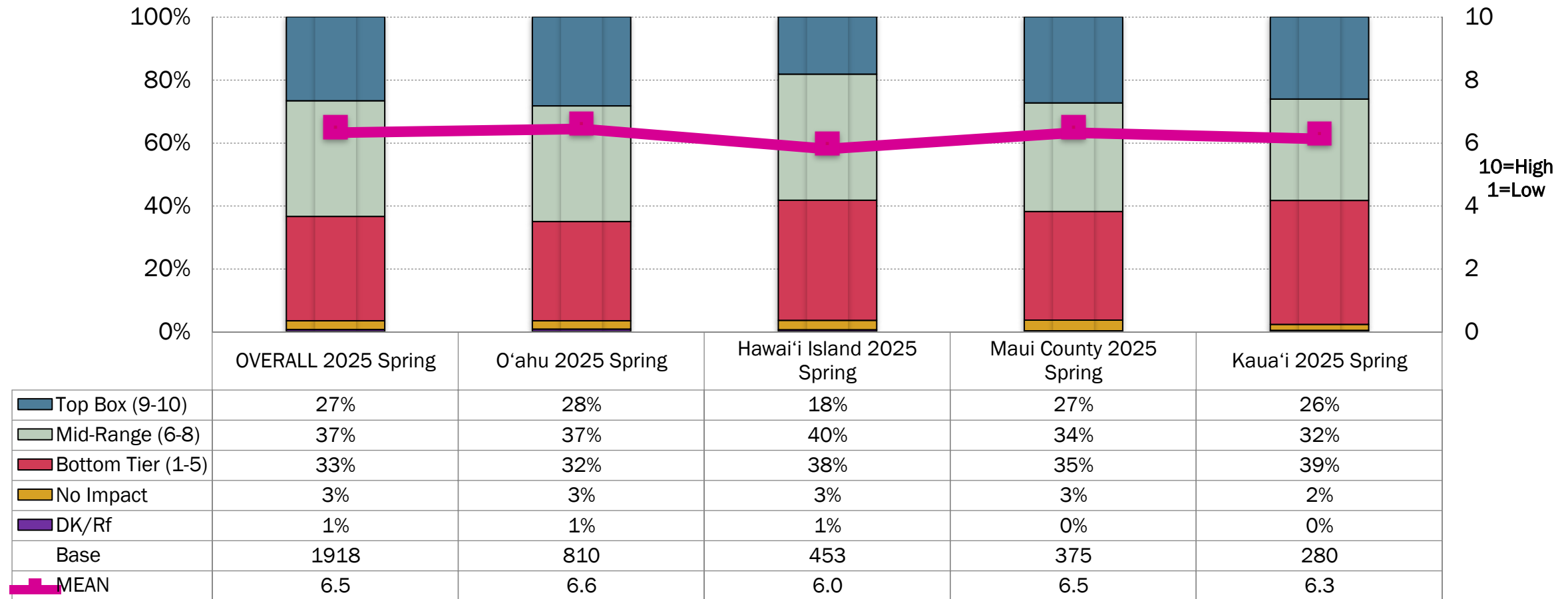


NEW SPRING 2025: Q12B. What do you find most appealing about this industry? (Base: 1191)

Impact of Tourism's Slow Recovery

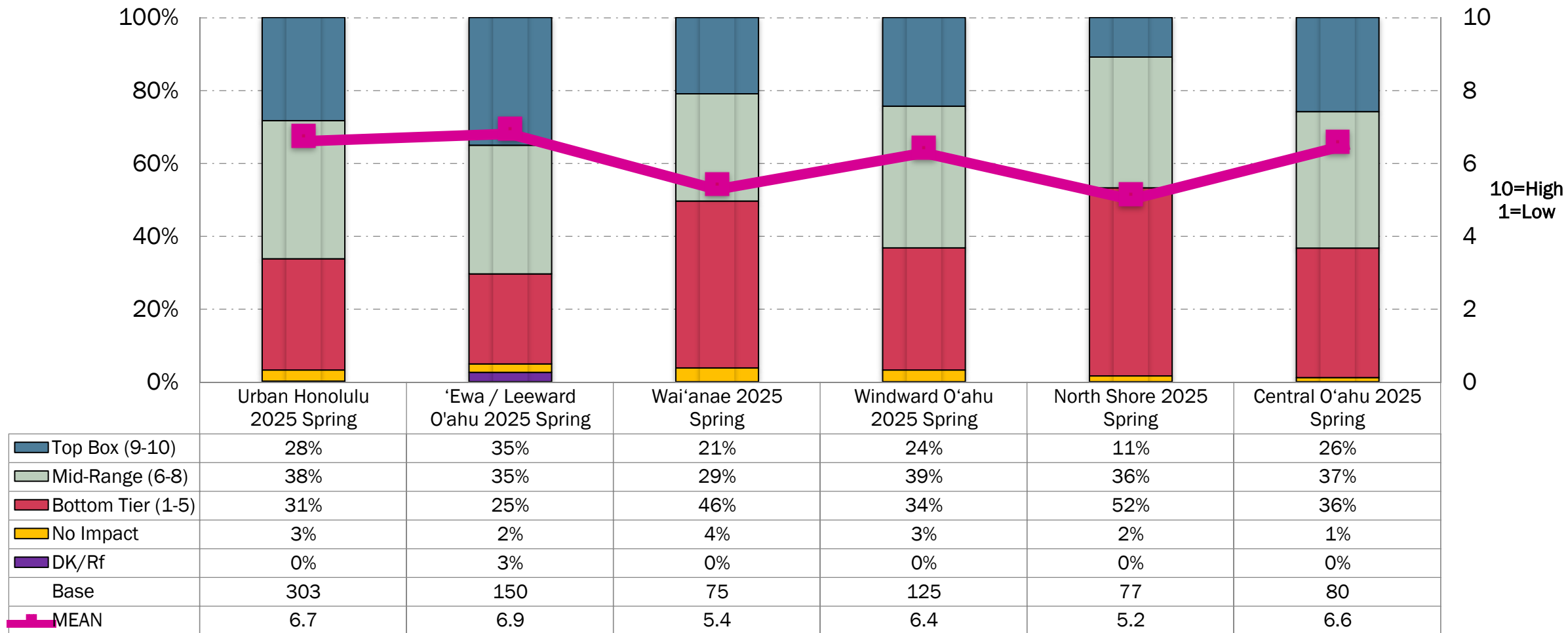


“Impact of Tourism’s Slow Recovery on State as a Whole” – *By County*



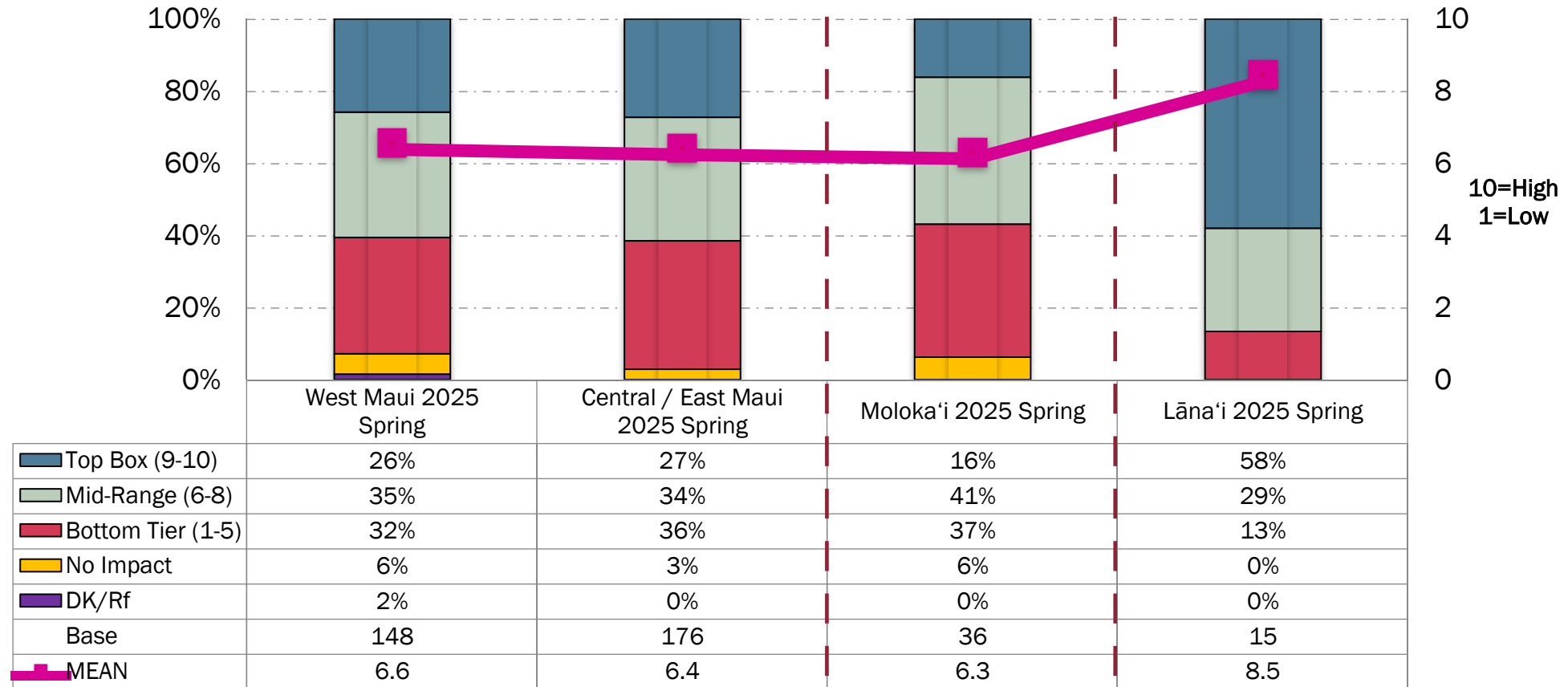
Q13. Hawai'i's tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism's slow recovery on?

“Impact of Tourism’s Slow Recovery on State as a Whole” – *By Area (O’ahu)*



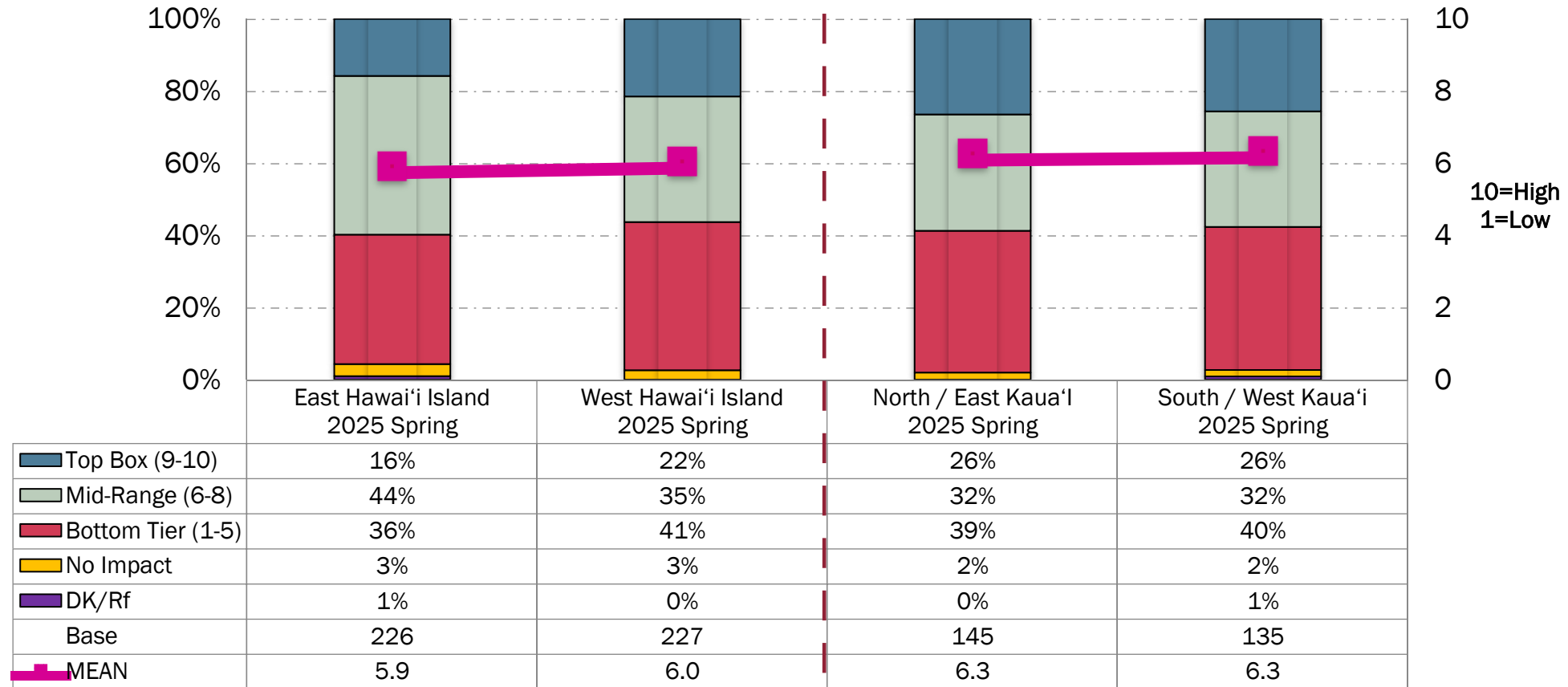
Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

“Impact of Tourism’s Slow Recovery on State as a Whole” – *By Area (Maui County)*



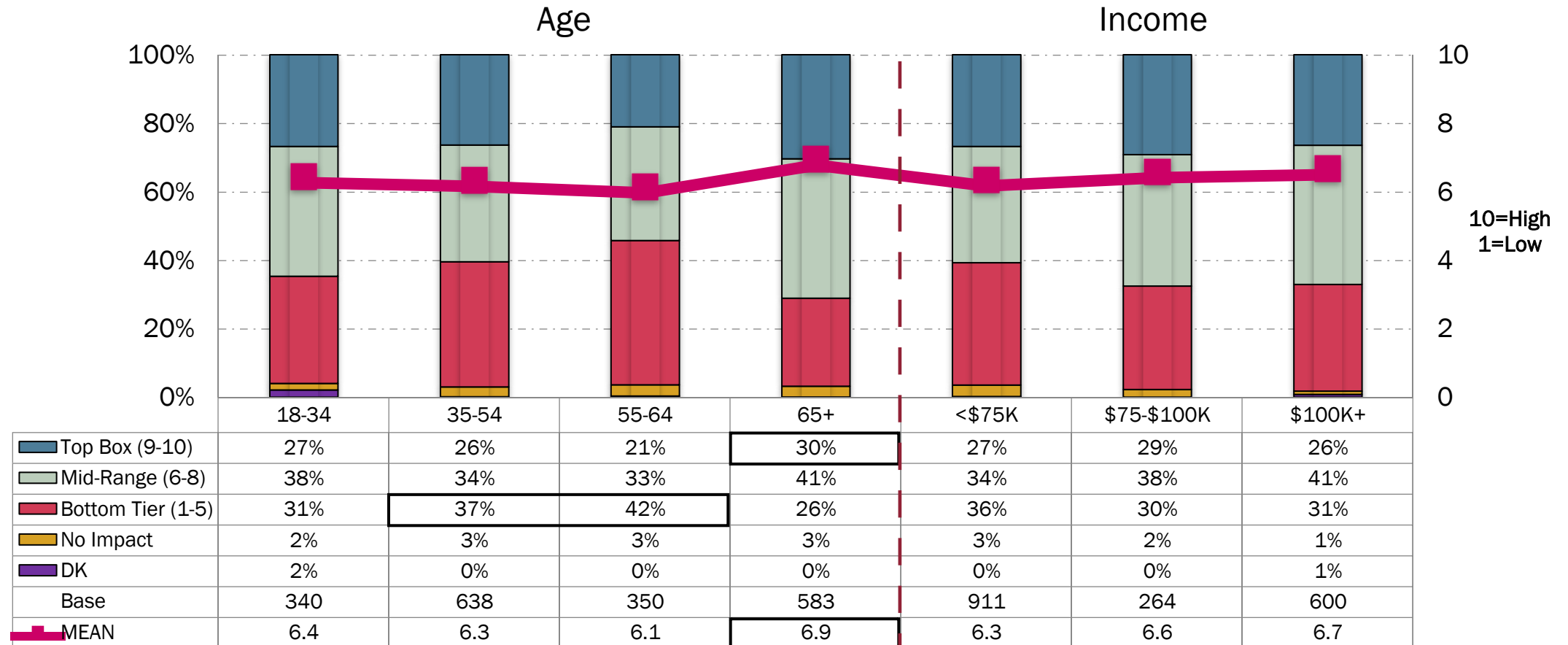
Q13. Hawai'i's tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism's slow recovery on?

“Impact of Tourism’s Slow Recovery on State as a Whole” – *By Area (Hawai‘i Island and Kaua‘i)*



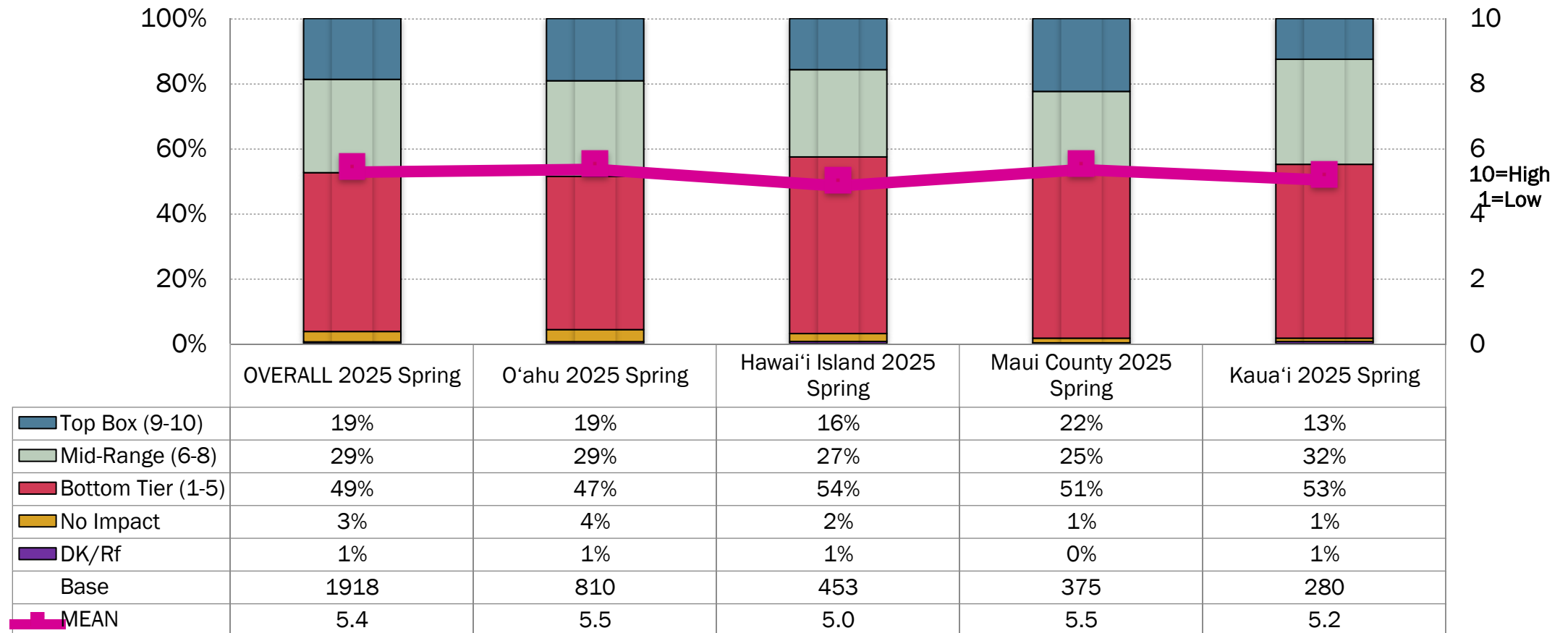
Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

“Impact of Tourism’s Slow Recovery on State as a Whole” – *By Demographics*



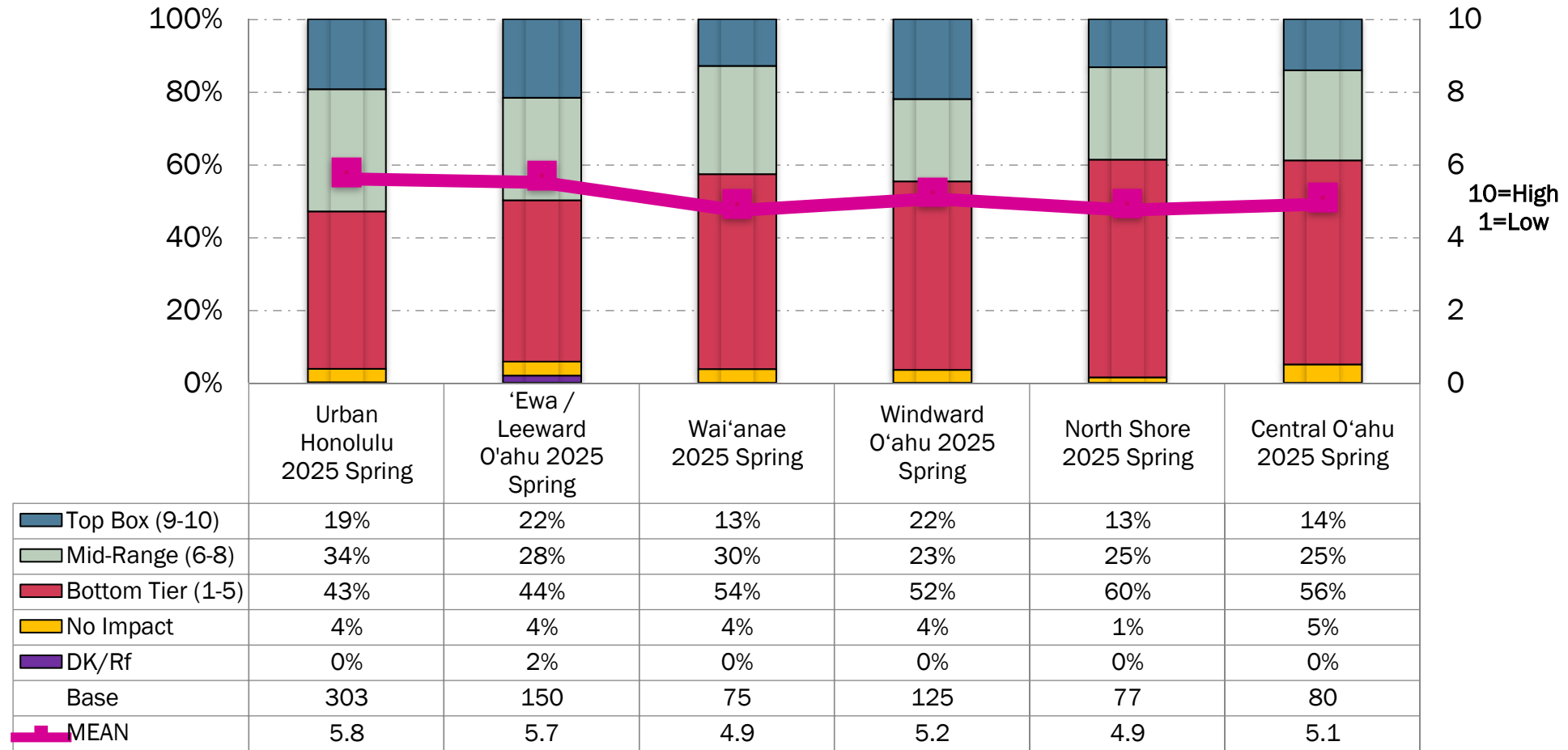
Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

“Impact of Tourism’s Slow Recovery on You and your family” – *By County*



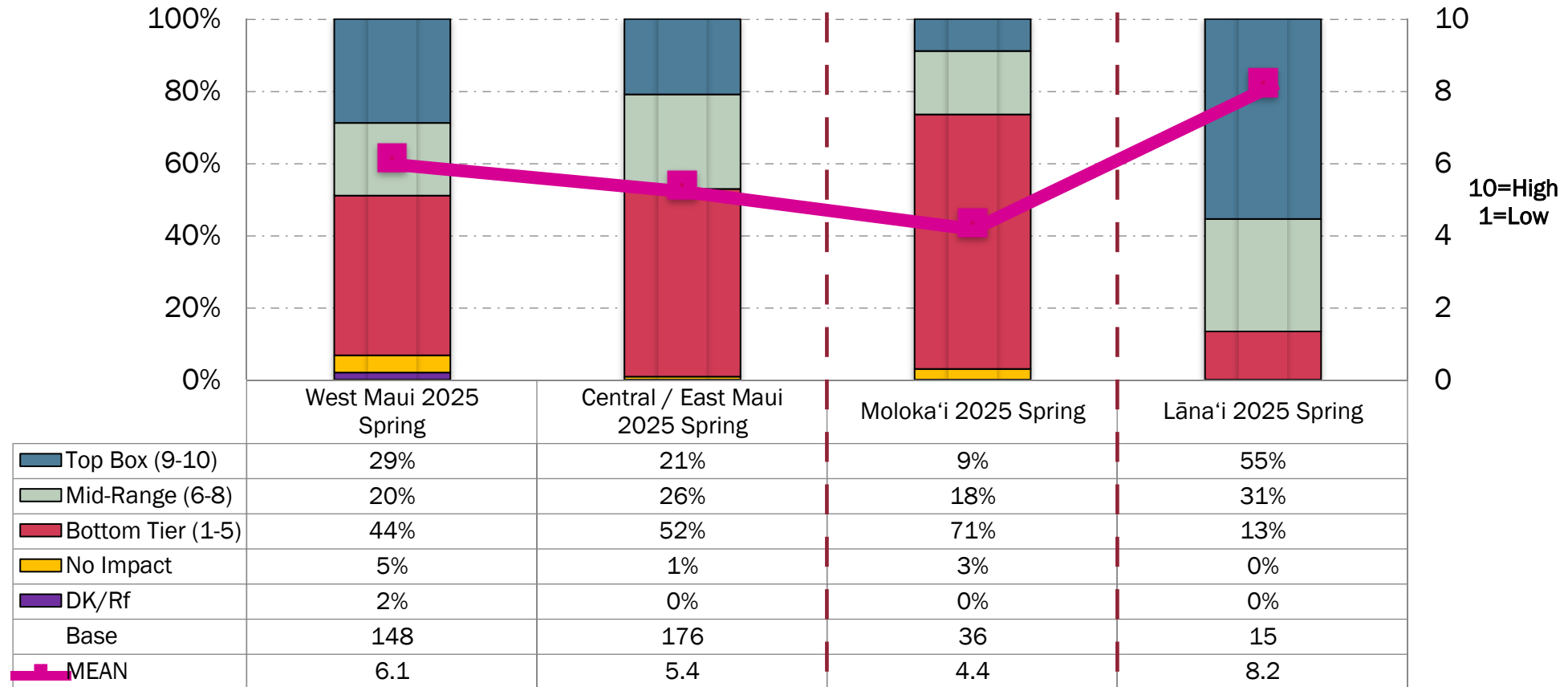
Q13. Hawai'i's tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism's slow recovery on?

“Impact of Tourism’s Slow Recovery on You and your family” – *By Area (O‘ahu)*



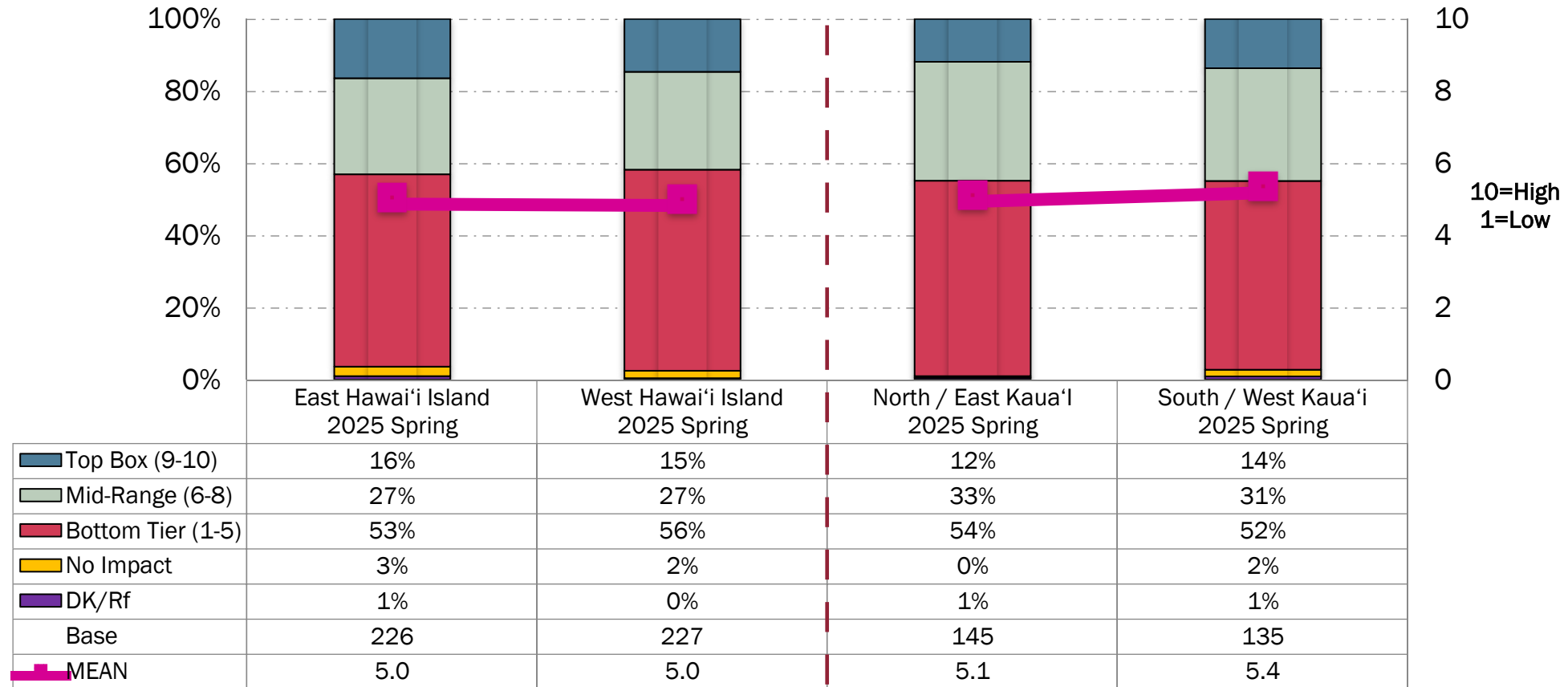
Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

“Impact of Tourism’s Slow Recovery on You and your family” – *By Area (Maui County)*



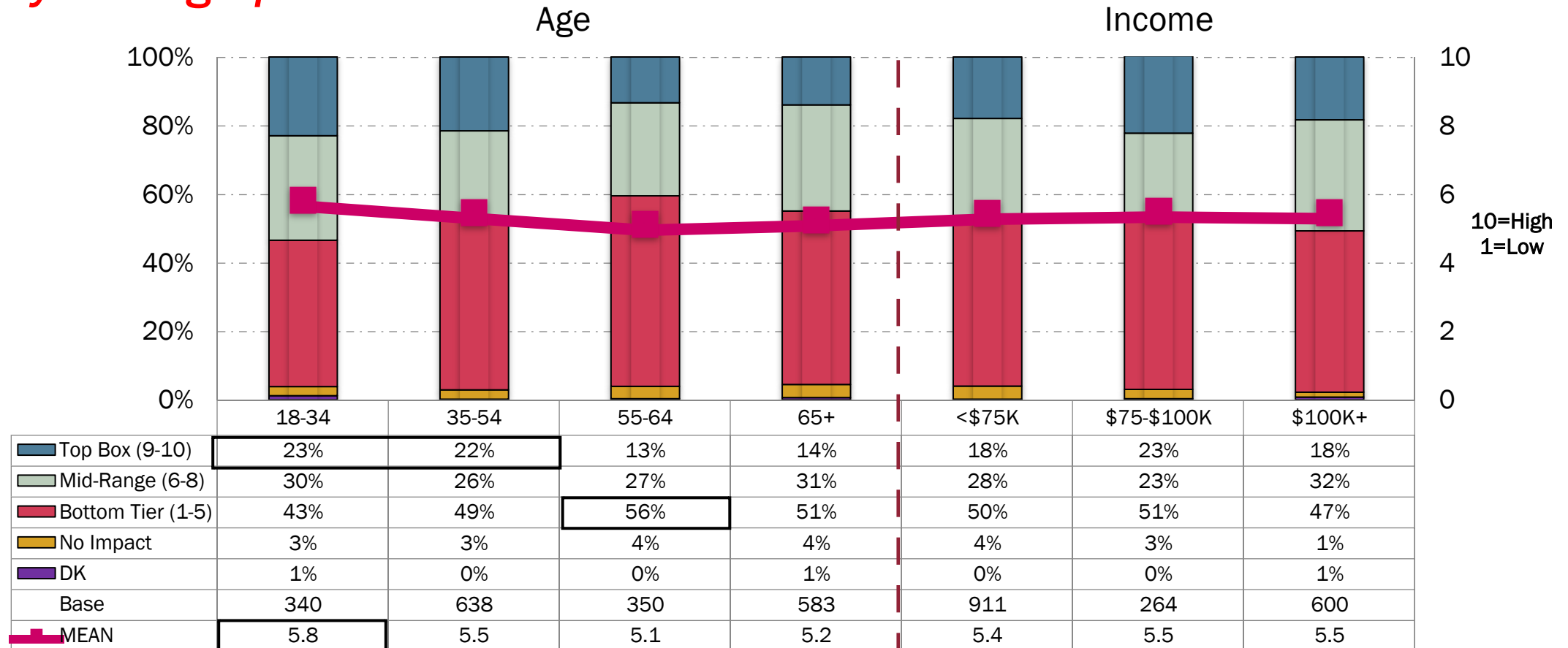
Q13. Hawai'i's tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism's slow recovery on?

“Impact of Tourism’s Slow Recovery on You and your family” – *By Area (Hawai‘i Island and Kaua‘i)*



Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

“Impact of Tourism’s Slow Recovery on You and your family” – *By Demographics*

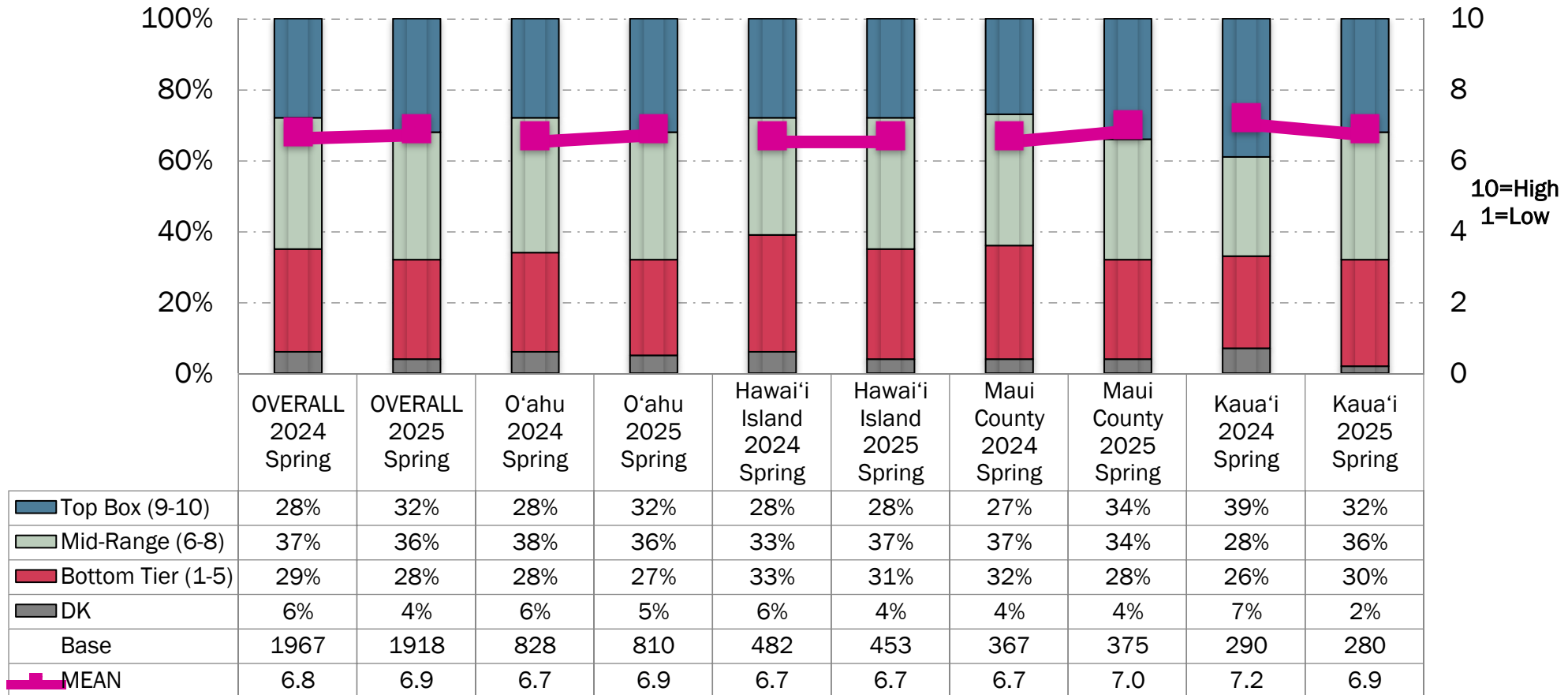


Q13. Hawai‘i’s tourism industry continues to be challenged by the impacts of the Lahaina Wildfires, a slow recovery in visitors from Japan, South Korea, Australia and New Zealand, and by worldwide economic and political problems. For the year ahead, how concerned are you with the impact of tourism’s slow recovery on?

Use of Tax Revenues to Manage/Encourage Tourism



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



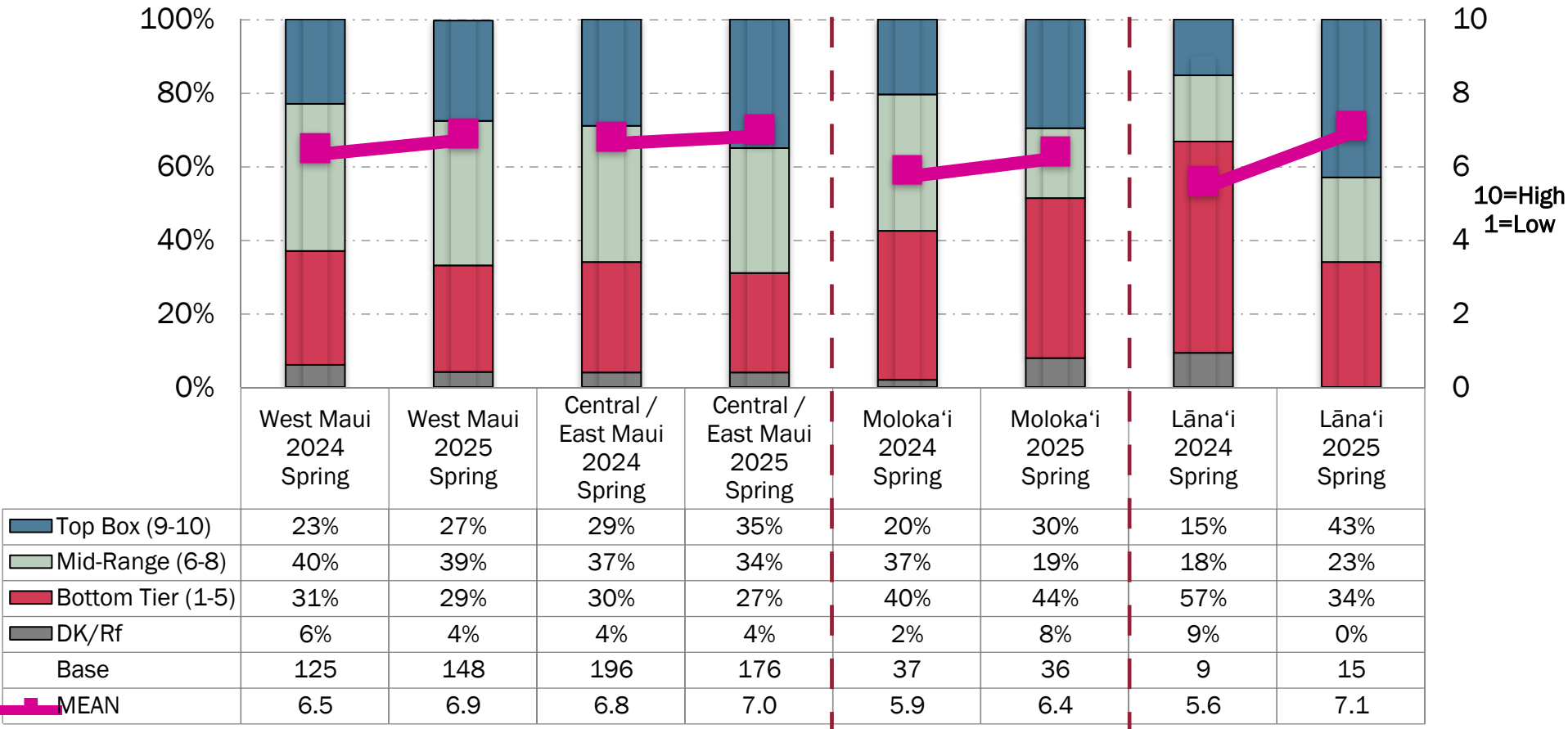
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



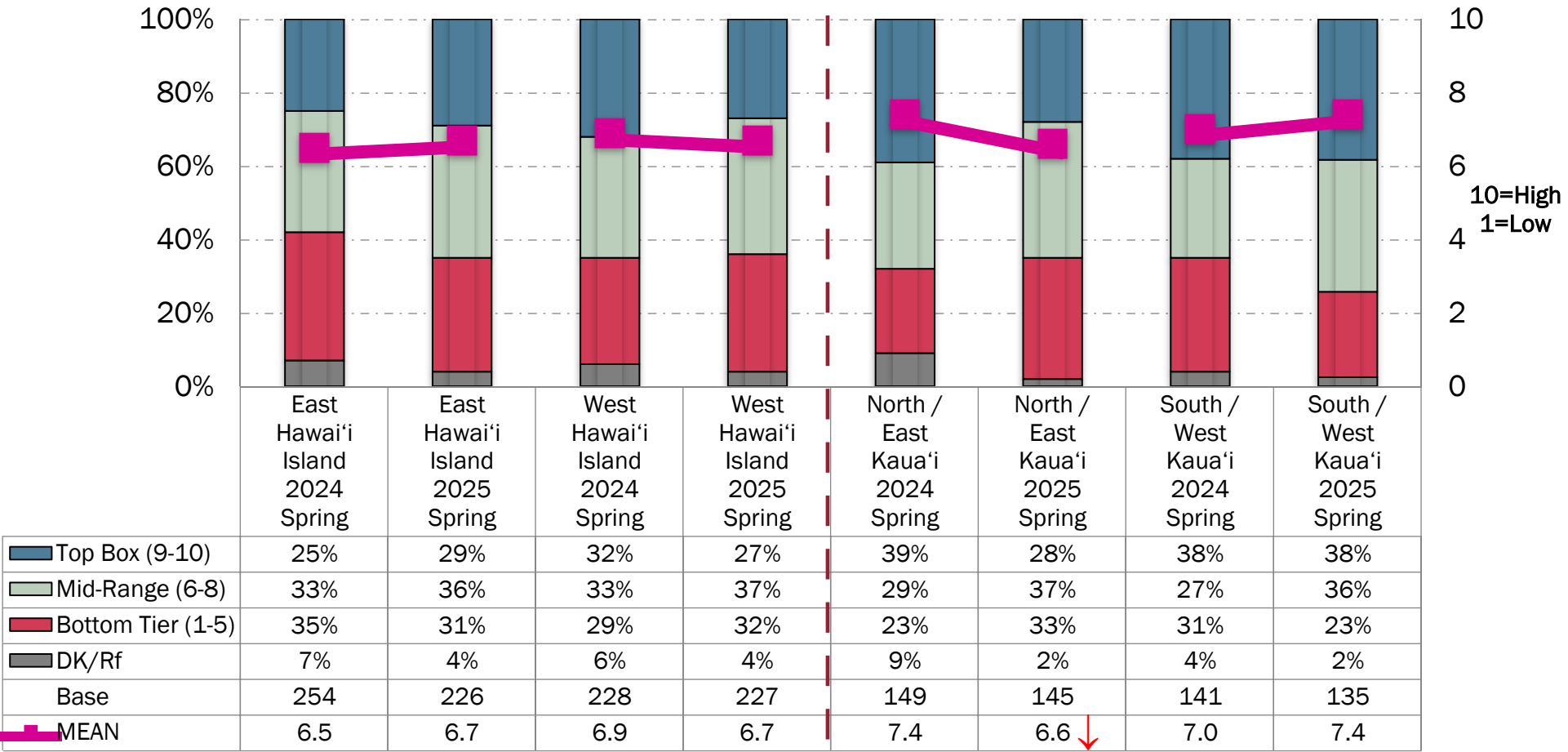
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



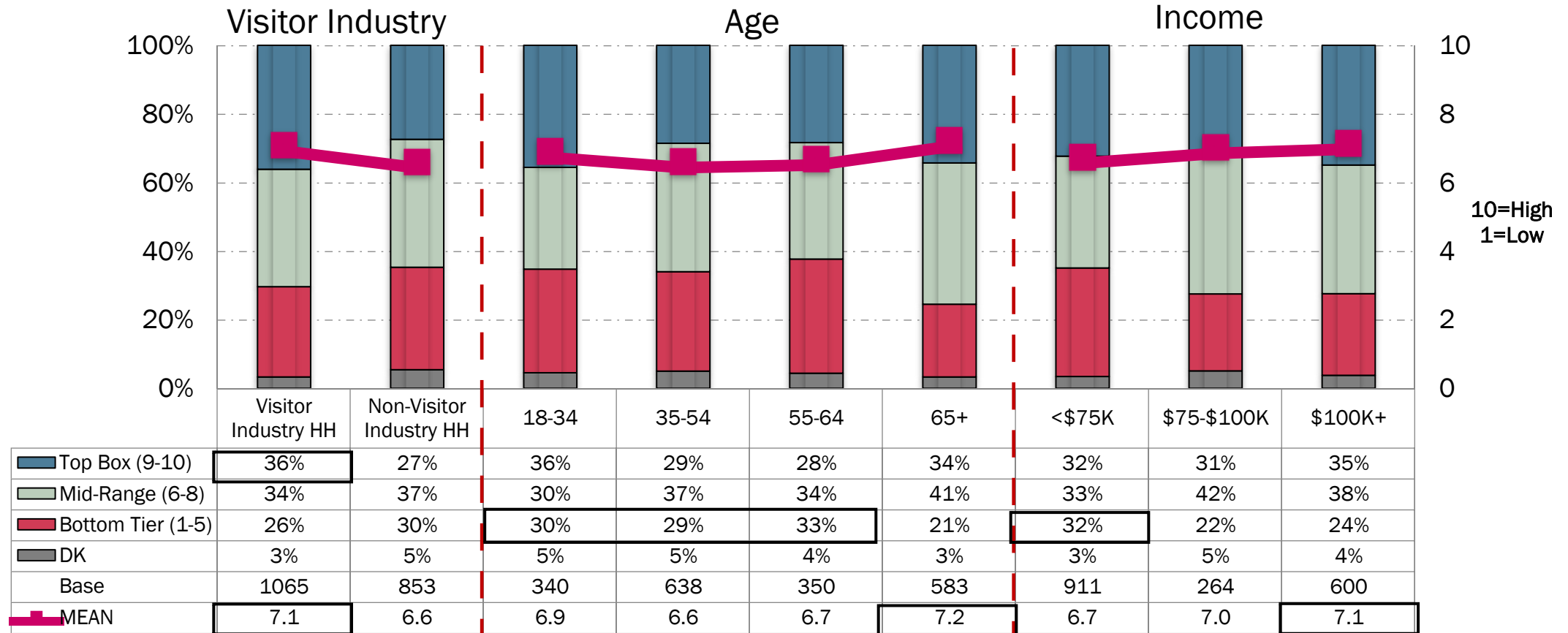
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



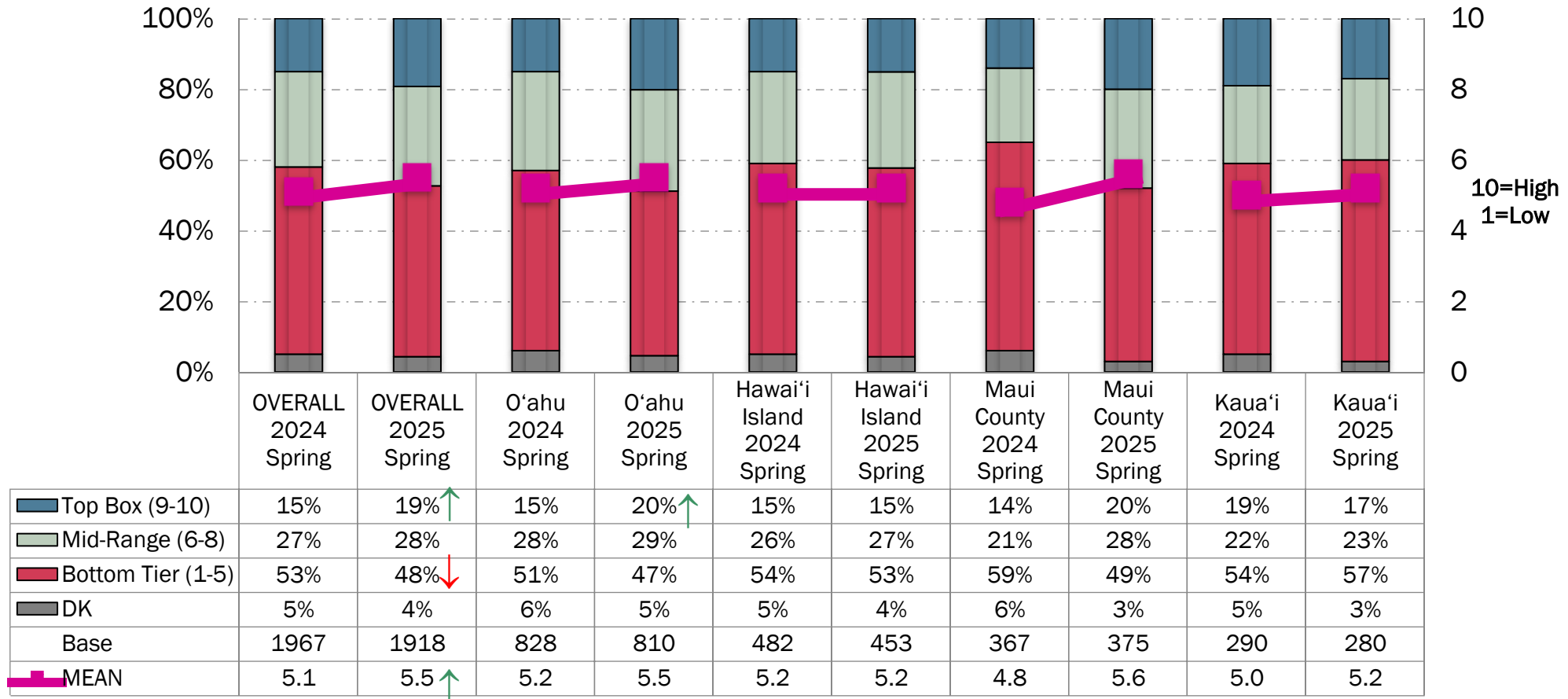
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

“Tax dollars should be spent to 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



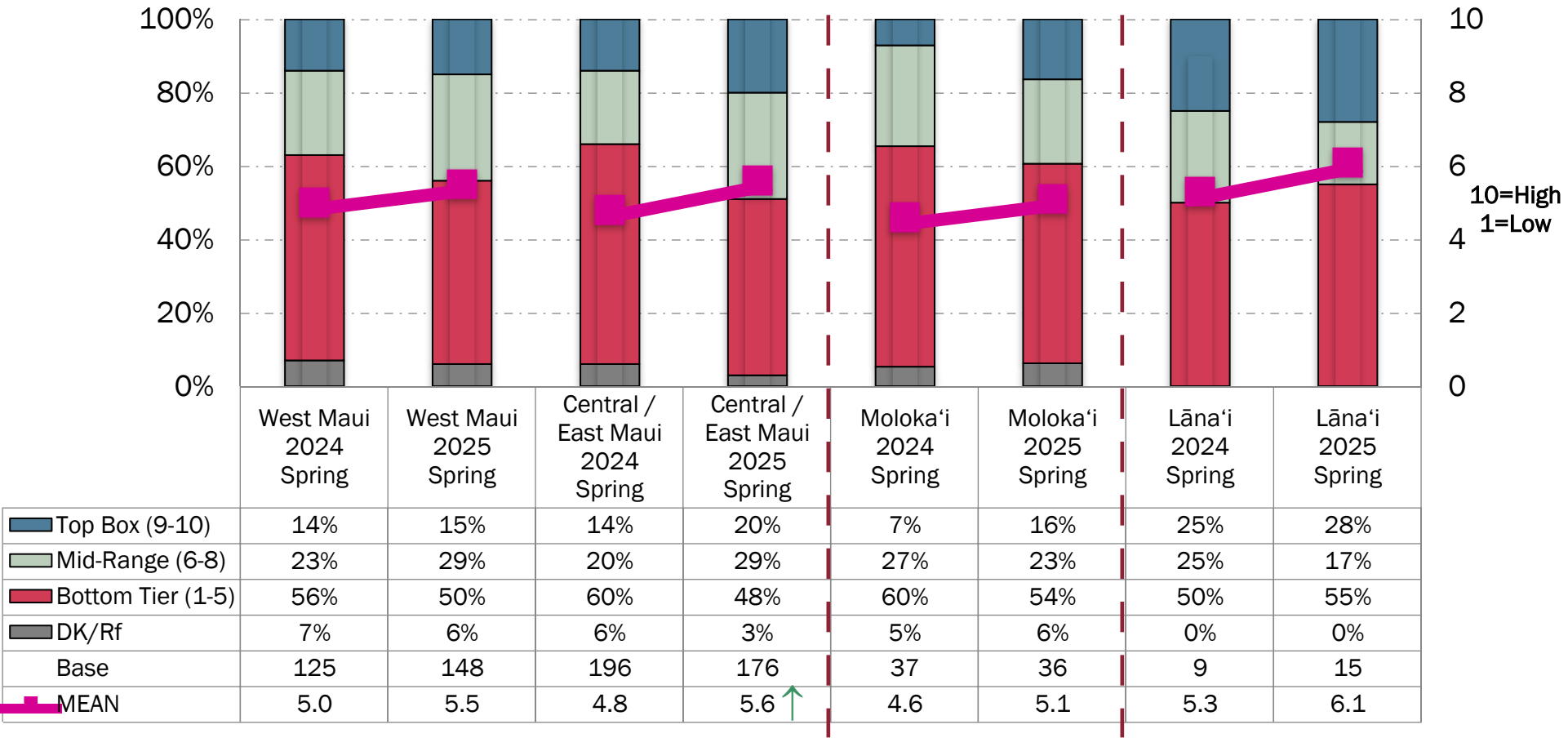
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



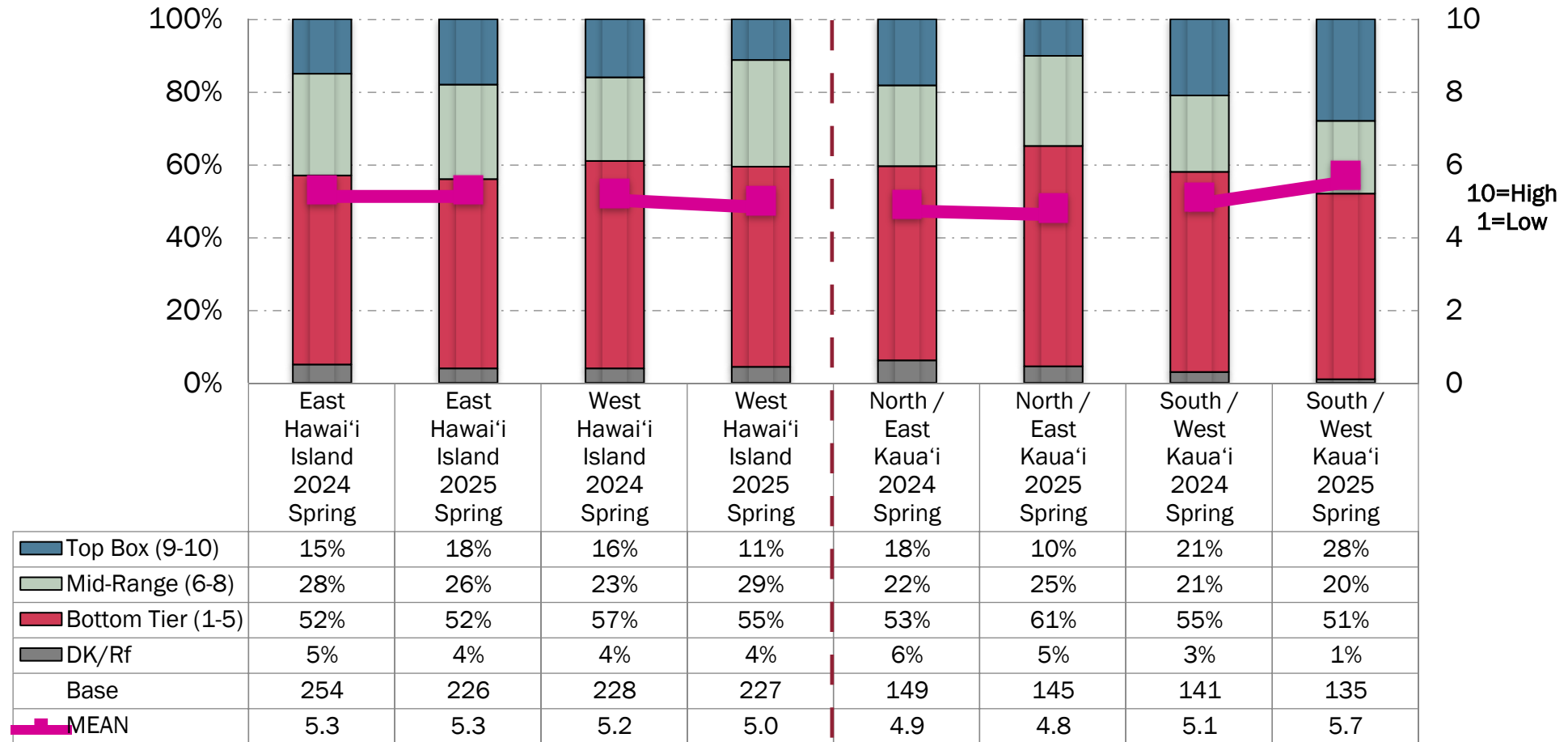
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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



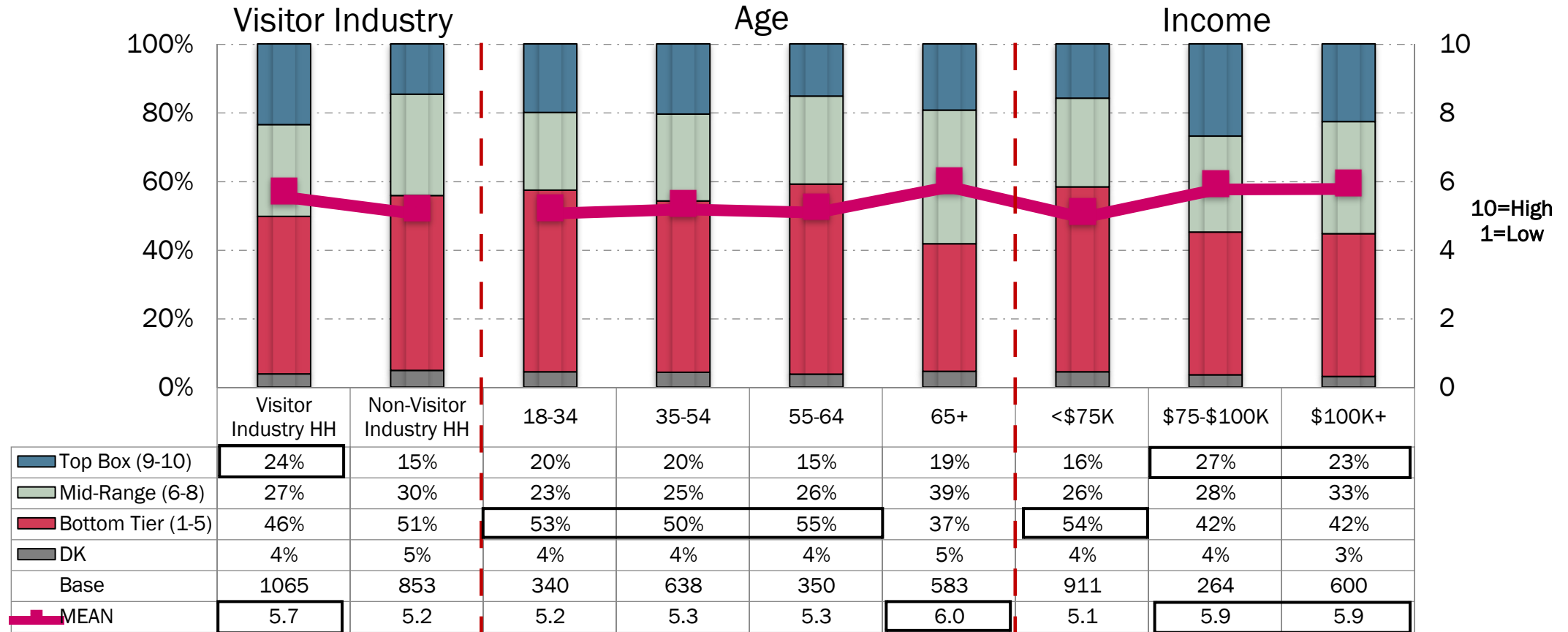
Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

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

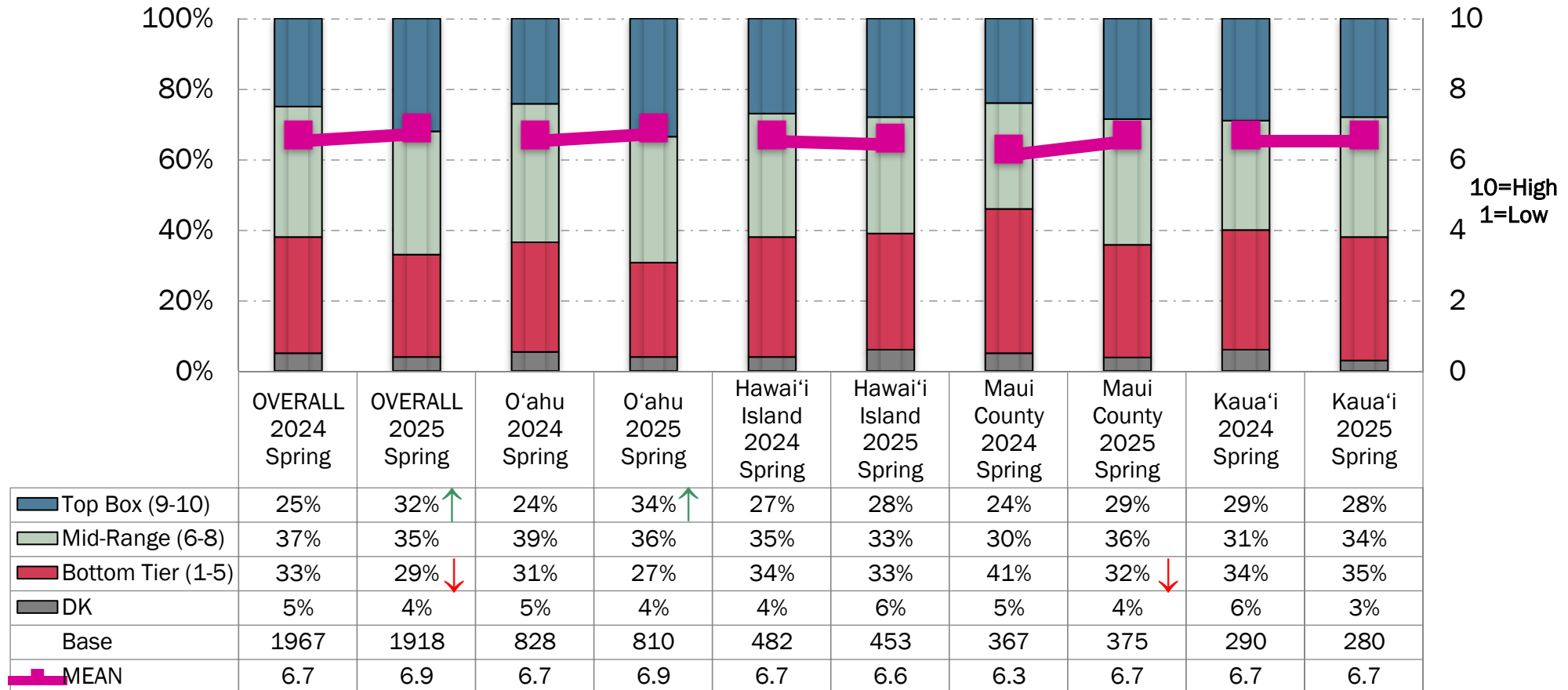


Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

Tourism Worth the Issues



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



Q11(q3rev). In 2024, visitors spent nearly \$21 billion in Hawai'i, which produced more than \$2.4 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, is tourism worth the issues associated with the industry?

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



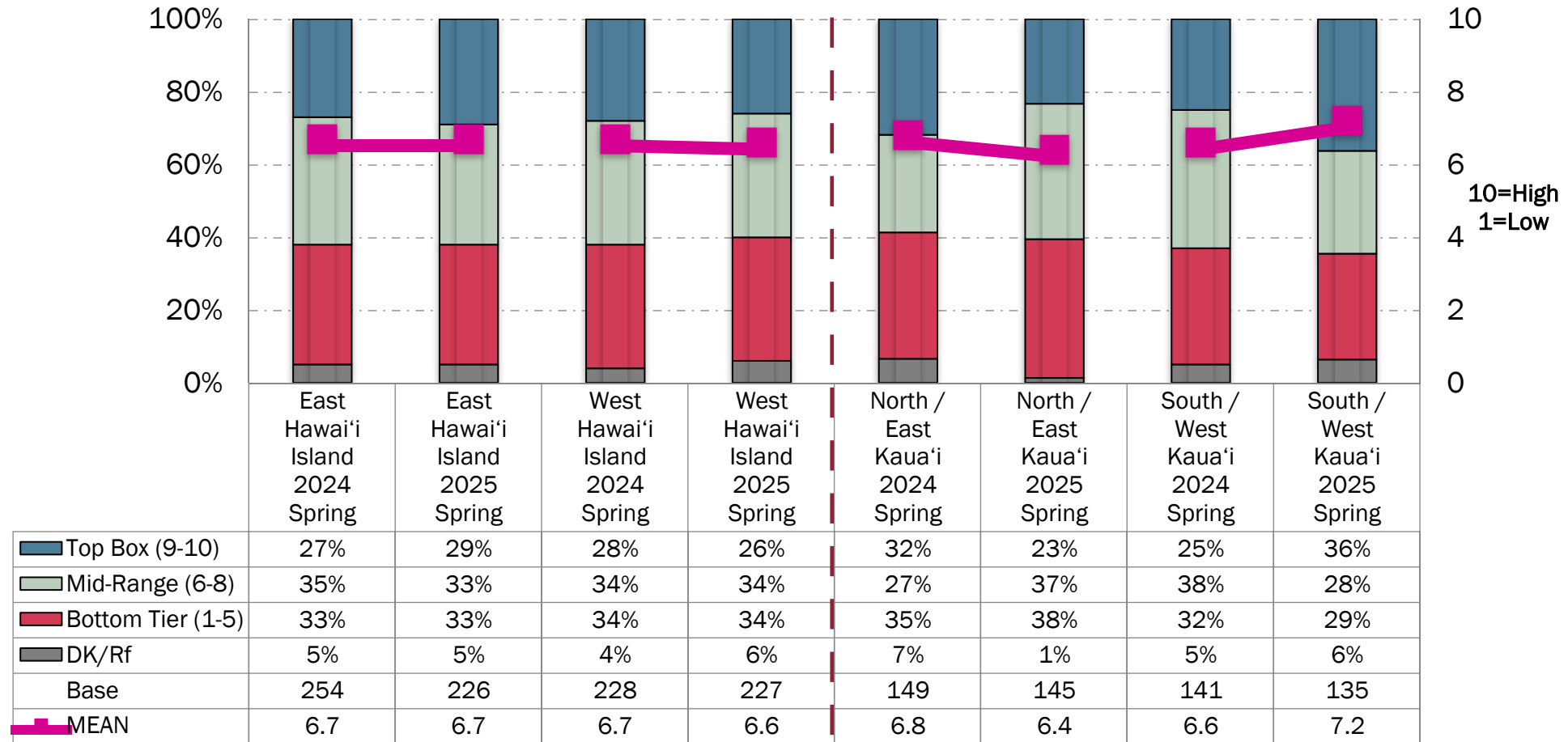
Q11(q3rev). In 2024, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2.4 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, is tourism worth the issues associated with the industry?

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



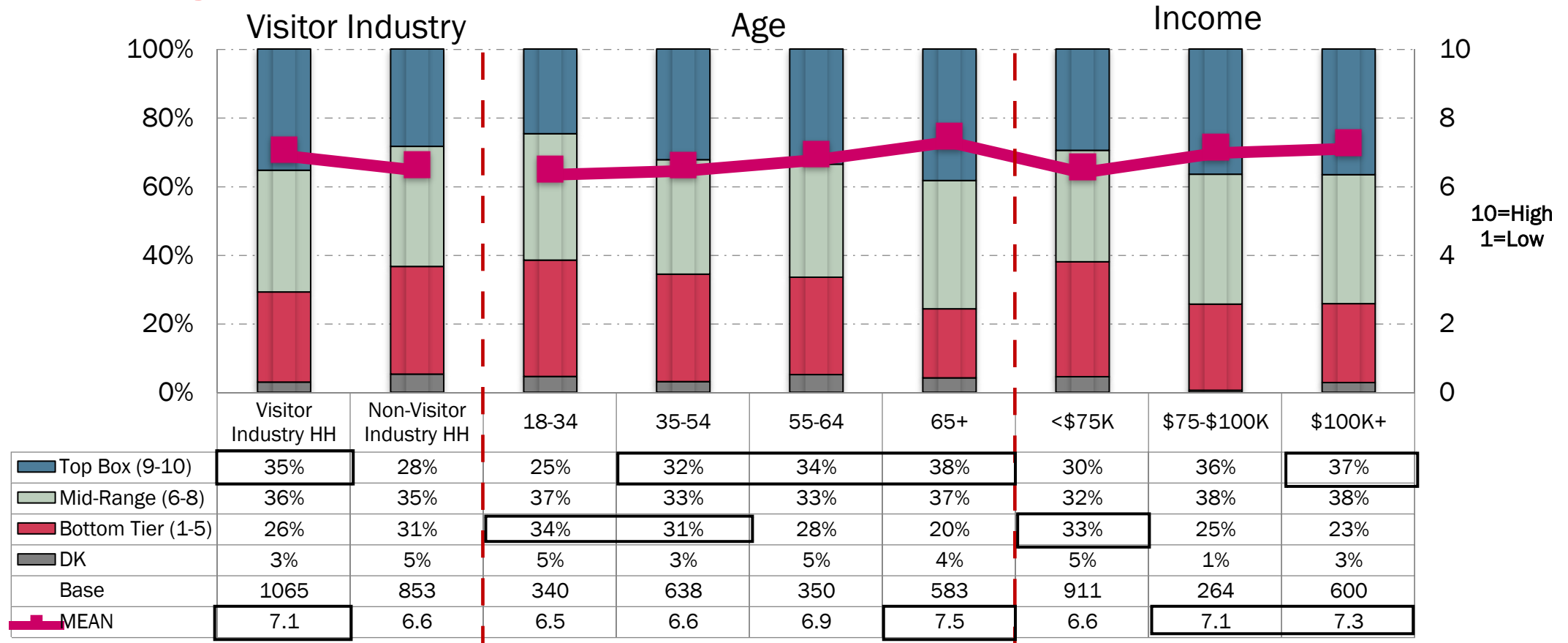
Q11(q3rev). In 2024, visitors spent nearly \$21 billion in Hawai'i, which produced more than \$2.4 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, is tourism worth the issues associated with the industry?

“I feel like tourism is worth the issues associated with the industry” - By Area (Hawai‘i Island and Kaua‘i)



Q11(q3rev). In 2024, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2.4 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, is tourism worth the issues associated with the industry?

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

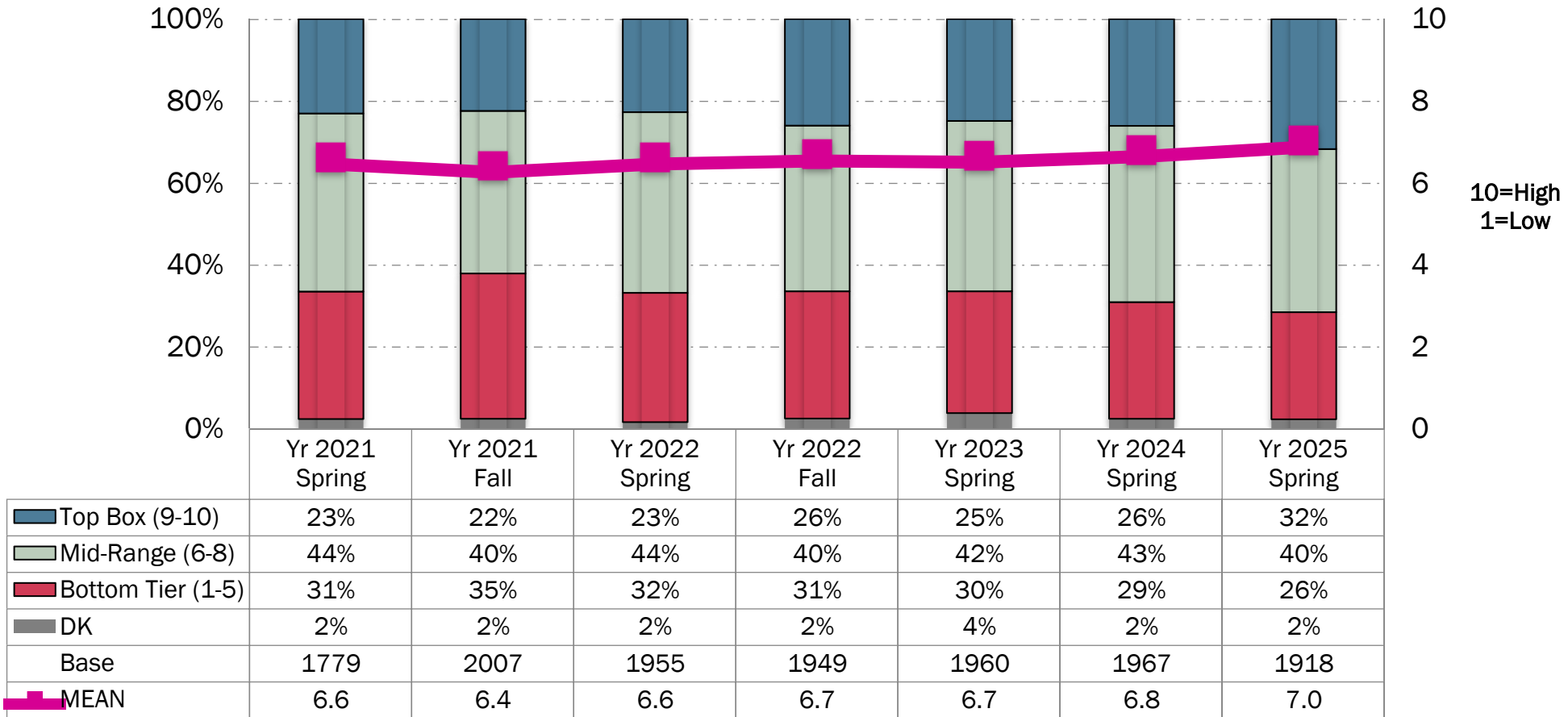


Q11(q3rev). In 2024, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2.4 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, is tourism worth the issues associated with the industry?

General Perceptions of the Visitor Industry

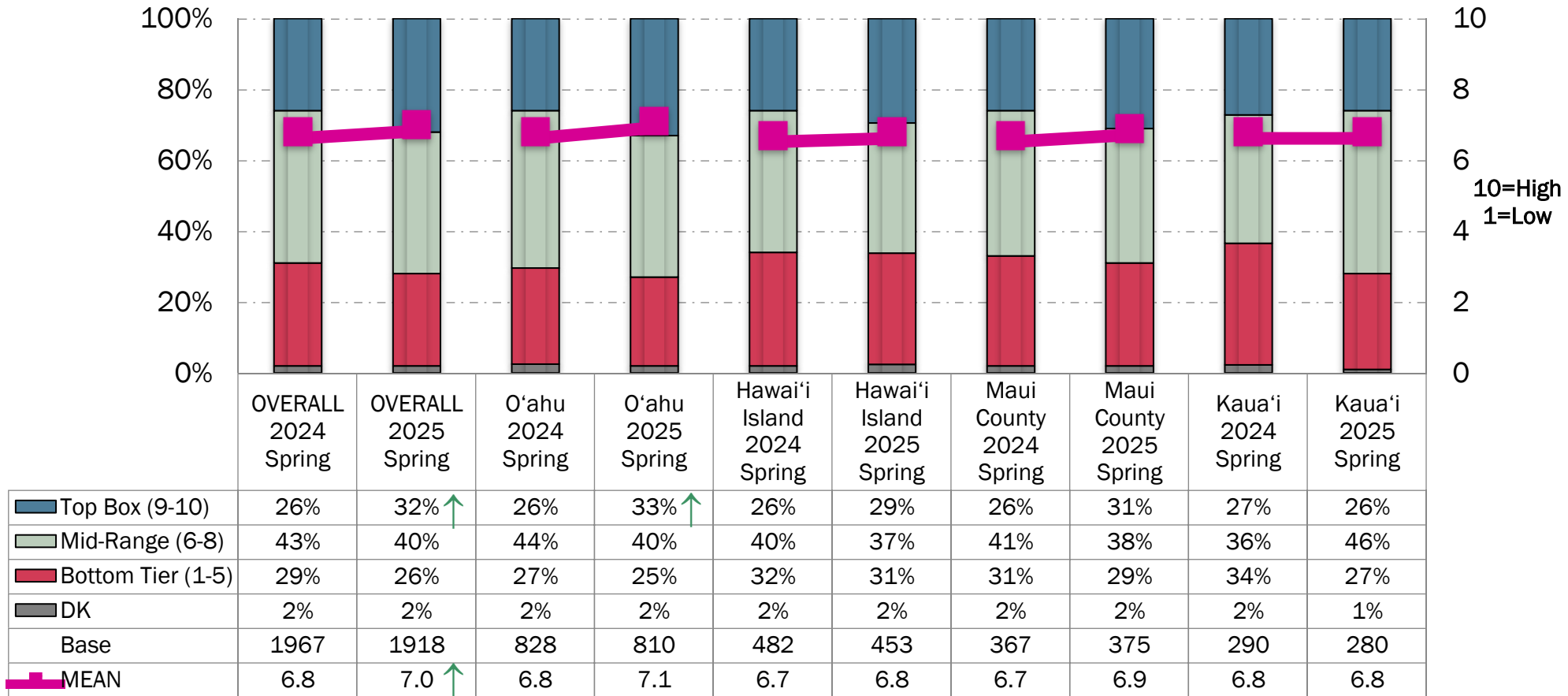


Perception of Tourism Industry in Hawai'i – Overall



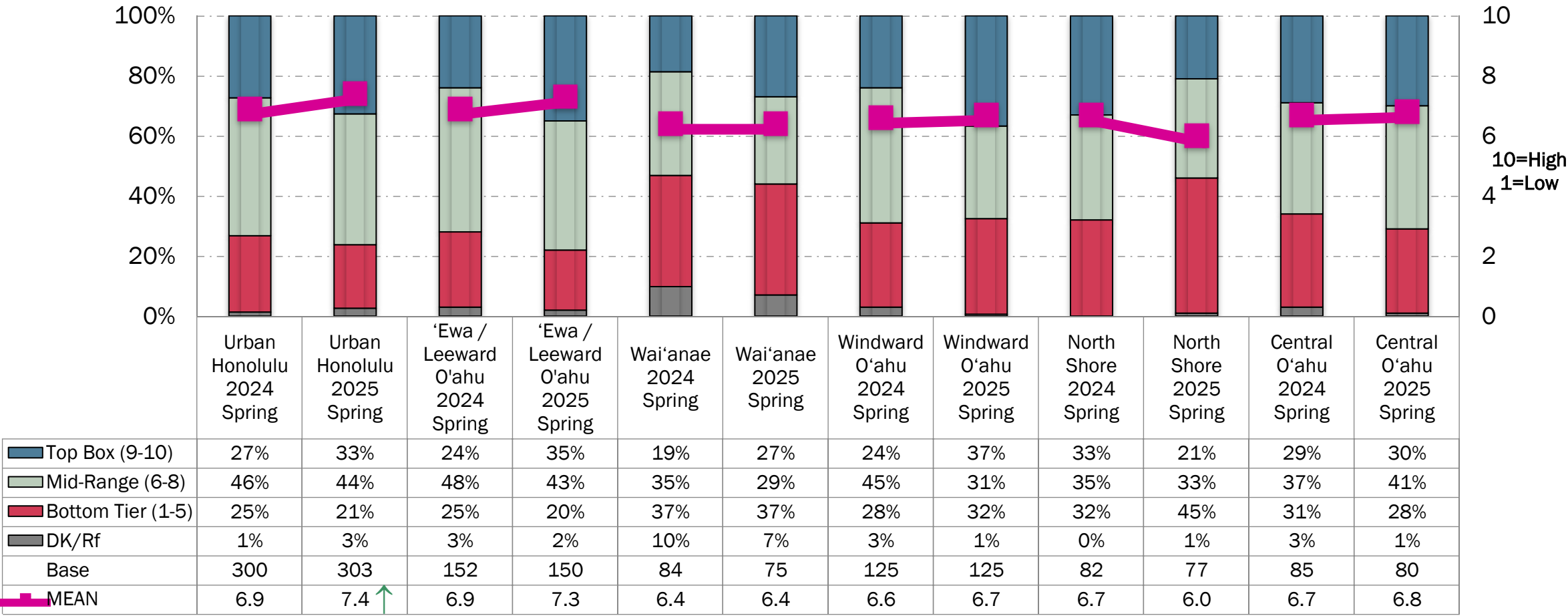
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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)*



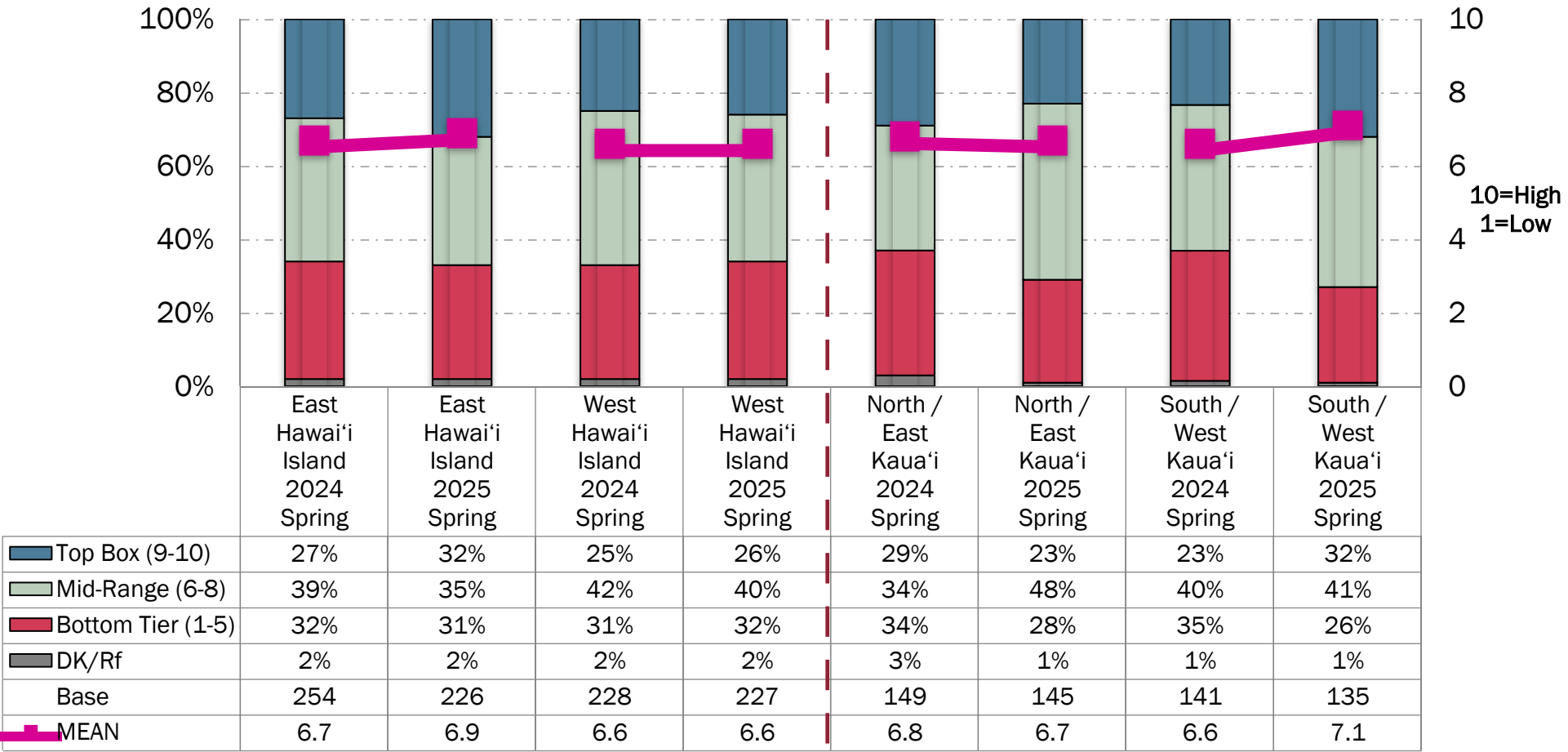
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



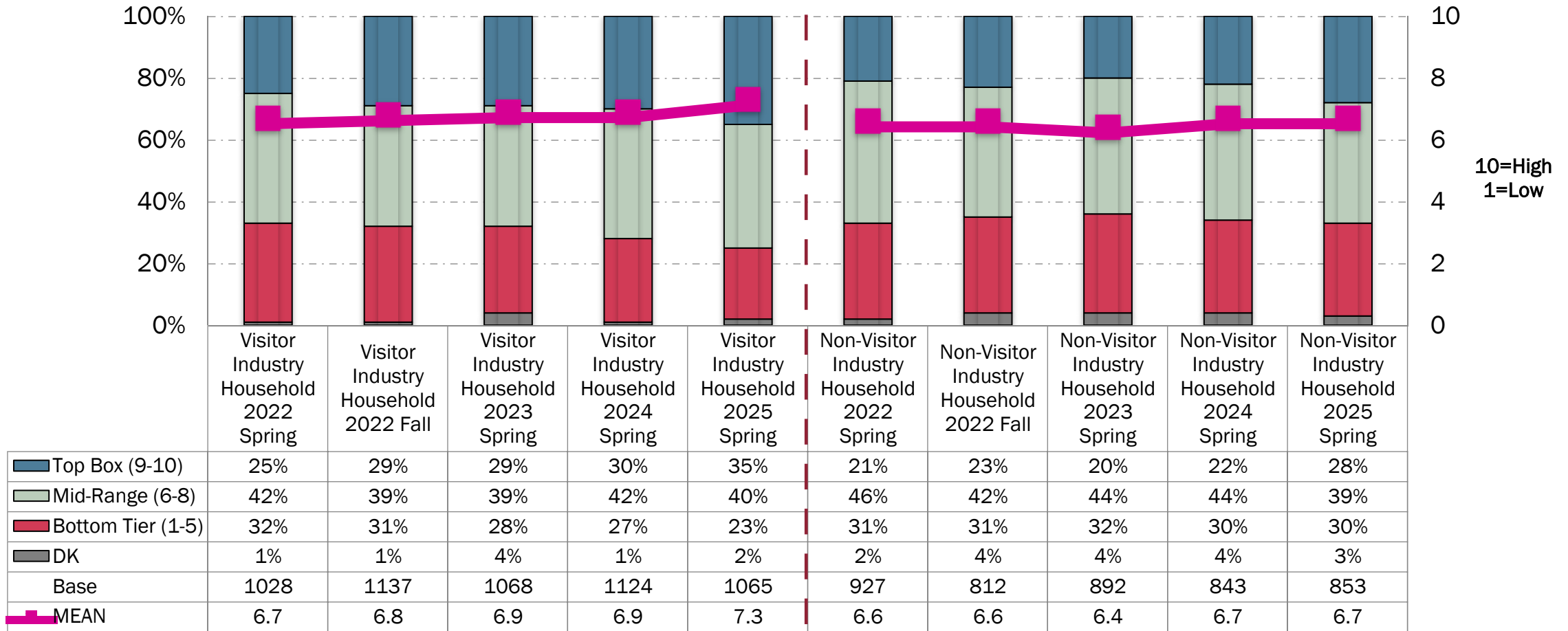
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai‘i?

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



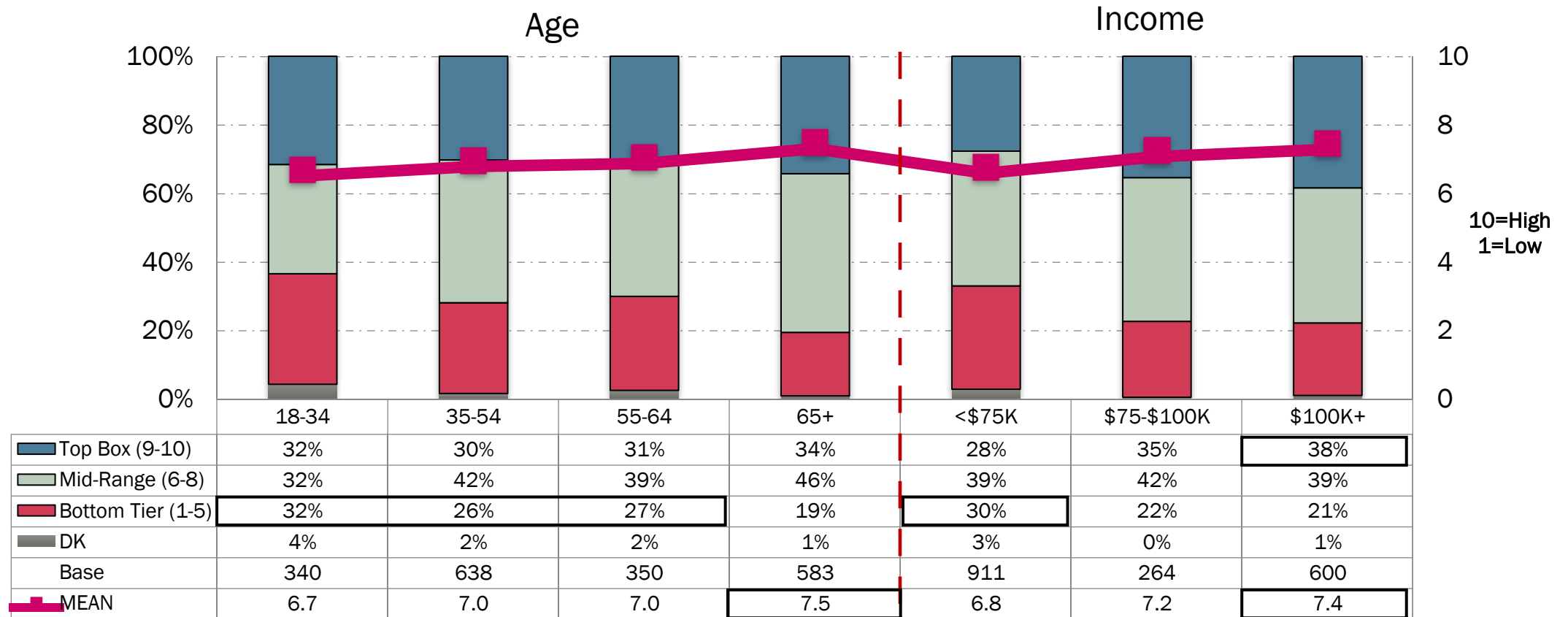
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



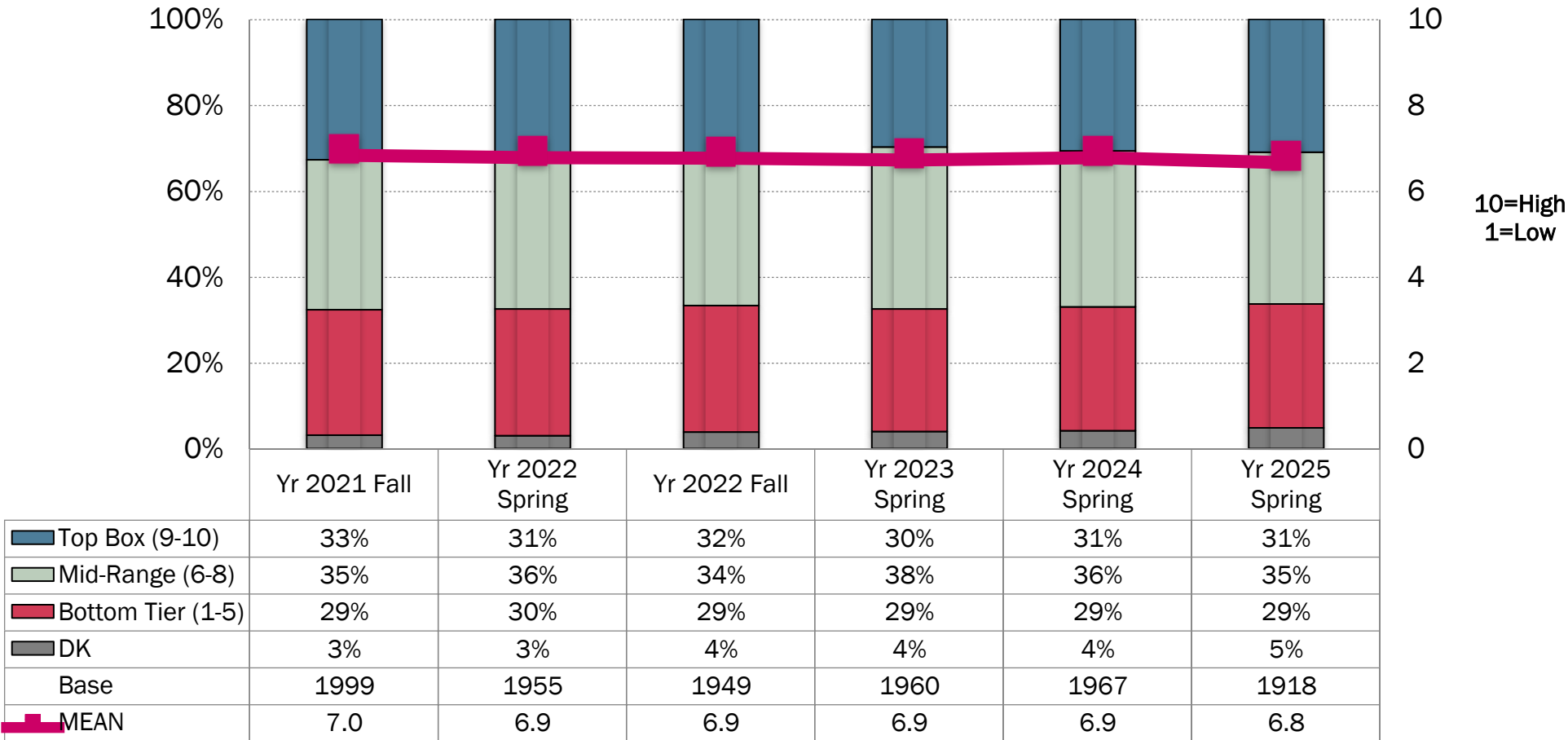
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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?

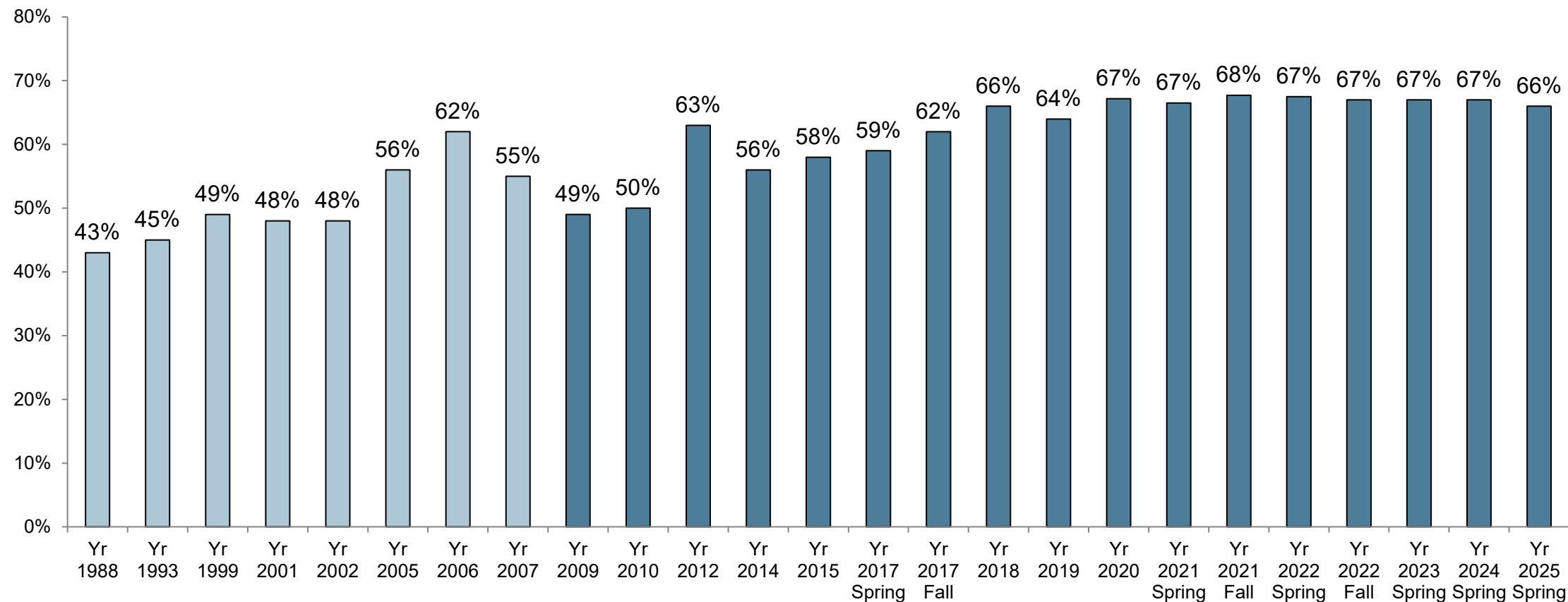
“This island is being run for tourists at the expense of local people” – Overall



Q4.11 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...?

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

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



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

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...?

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

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



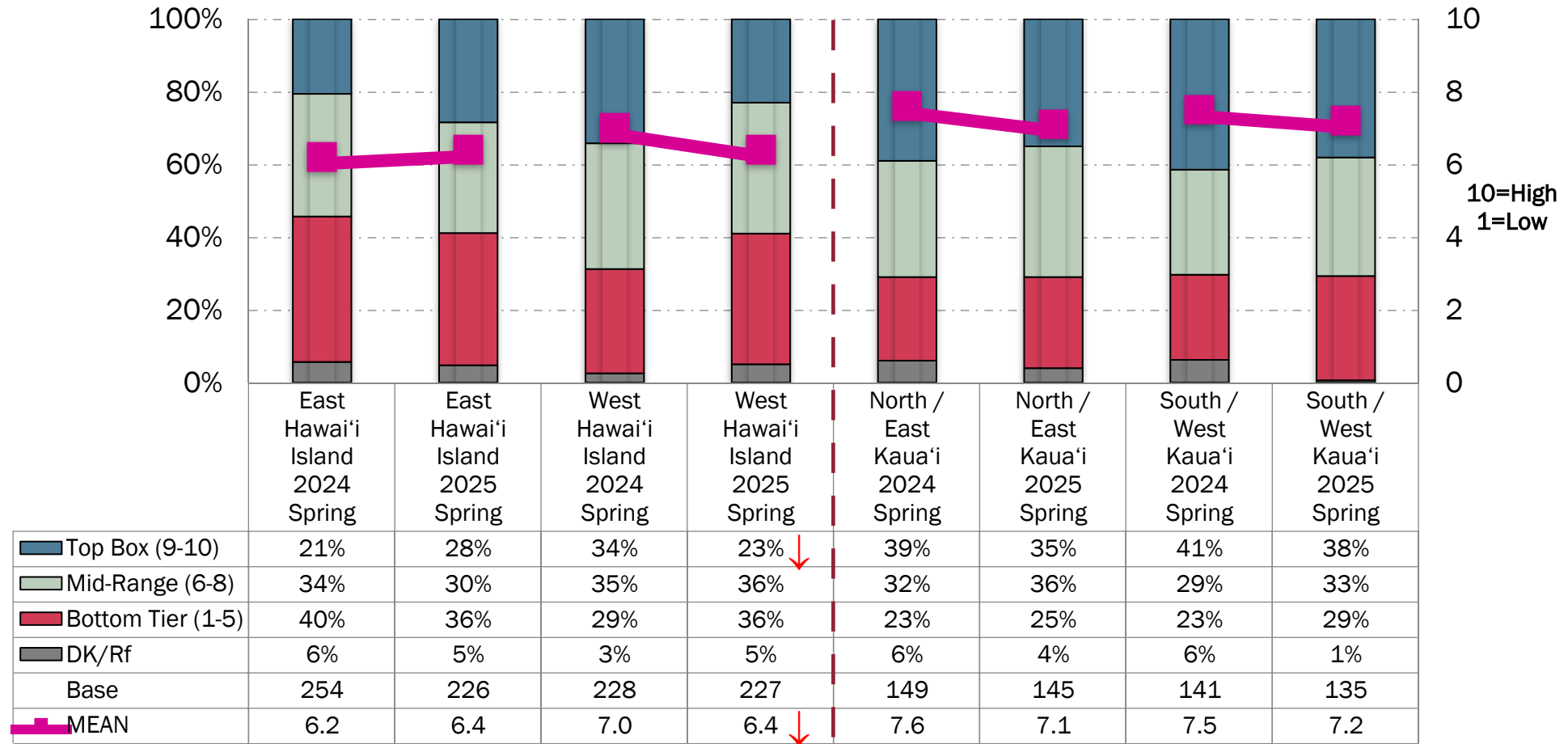
Q4.11 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” – By Area (Maui County)



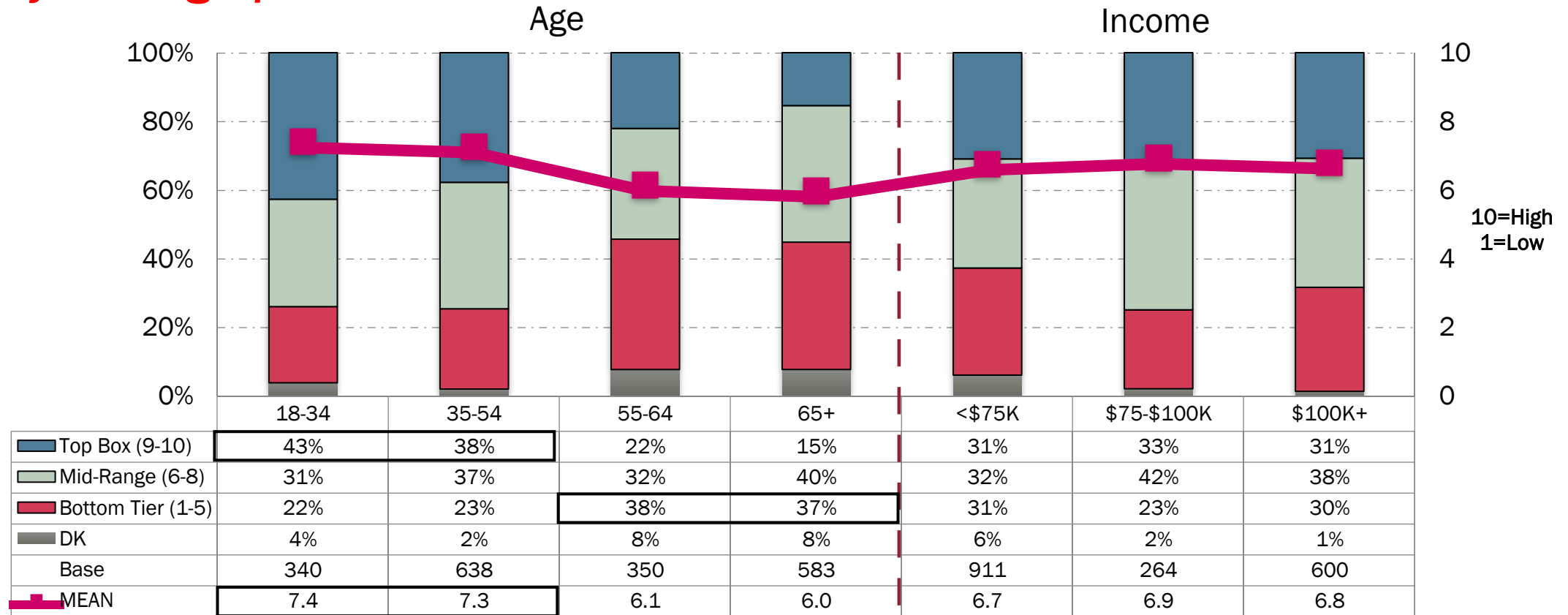
Q4.11 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



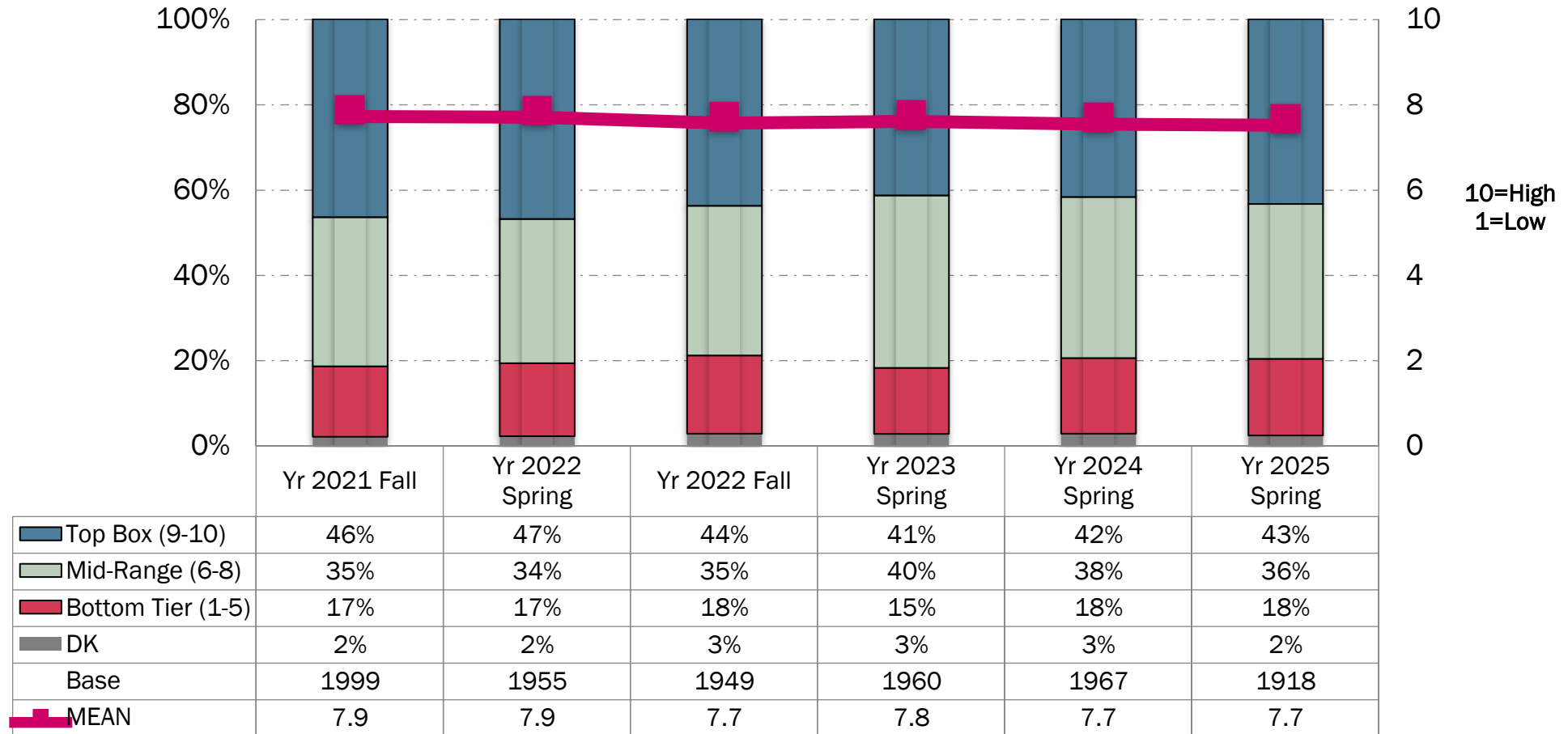
Q4.11 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



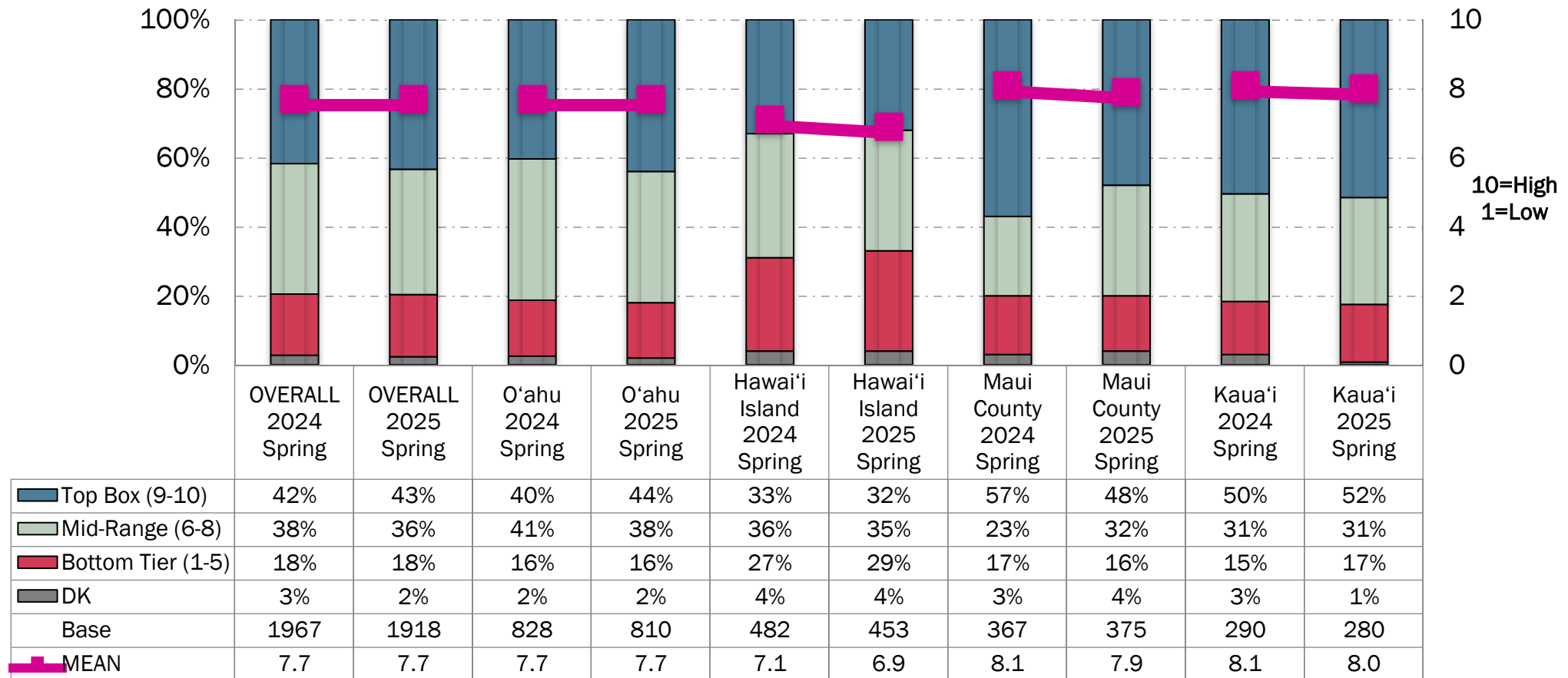
Q4.11 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



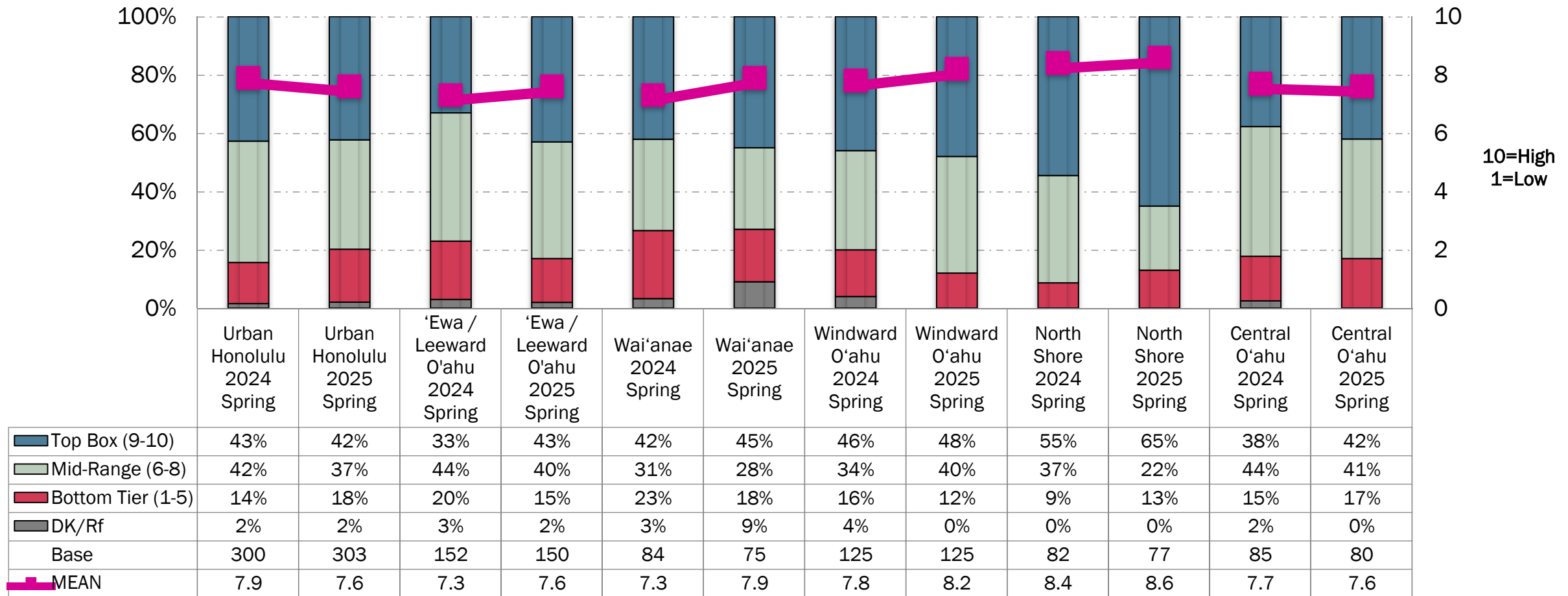
Q4.12 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

My island's economy is too dependent on tourism" – *By County*



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

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



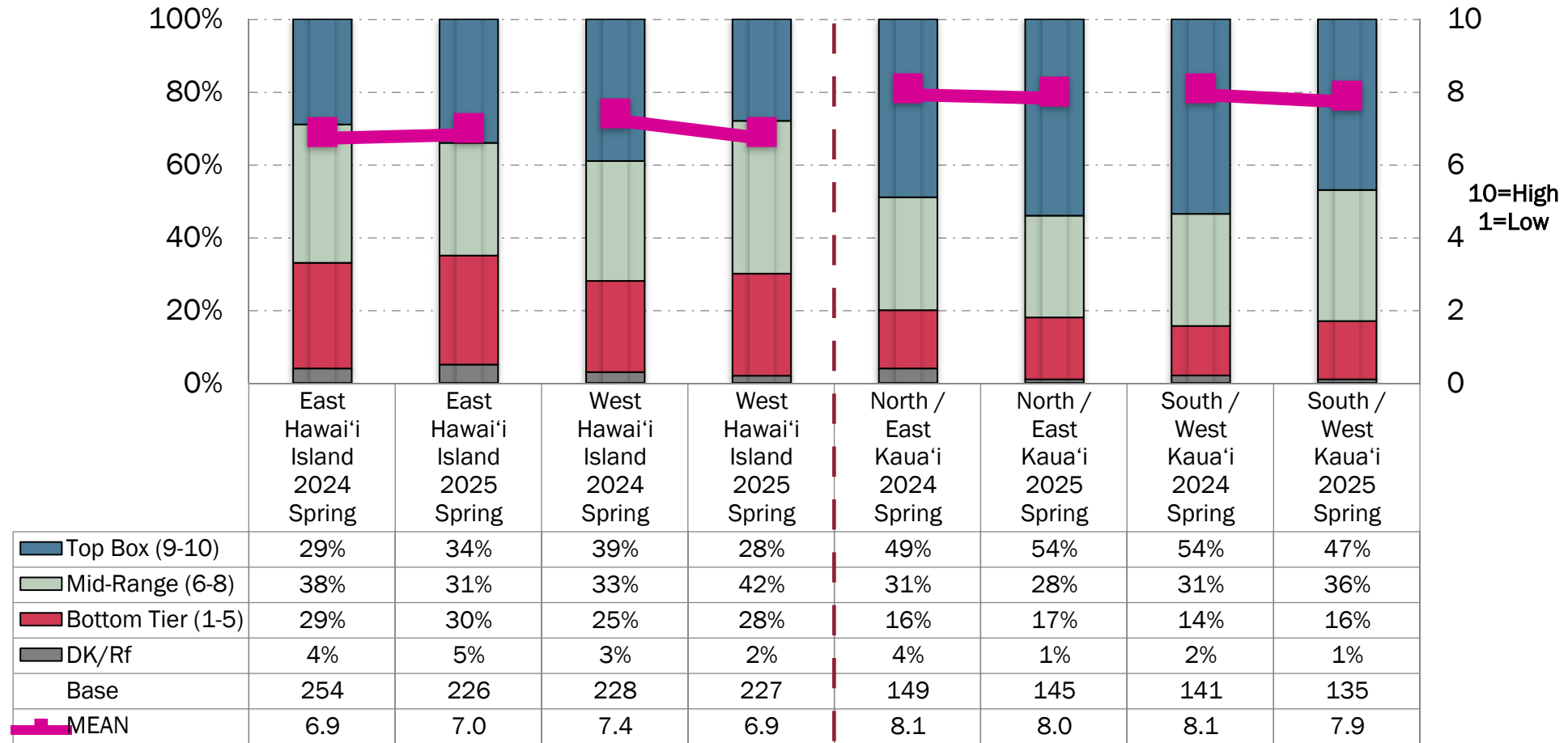
Q4.12 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



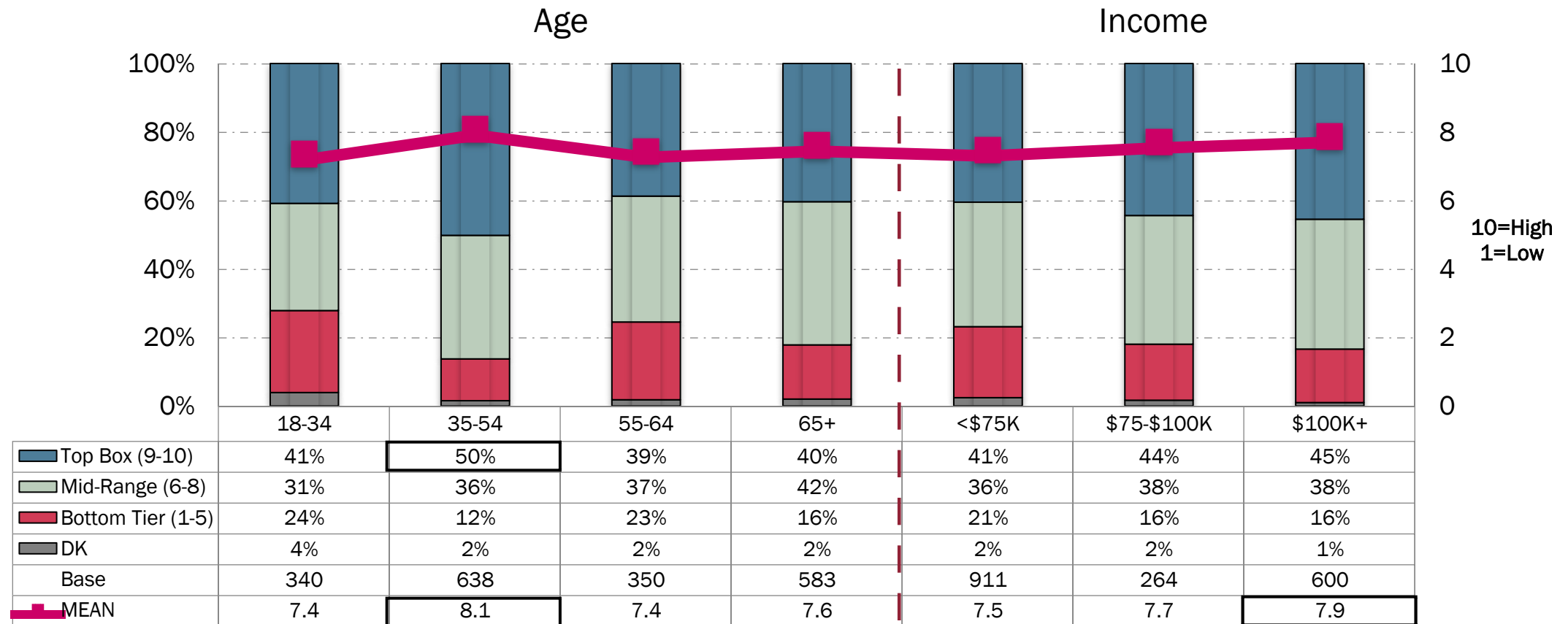
Q4.12 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



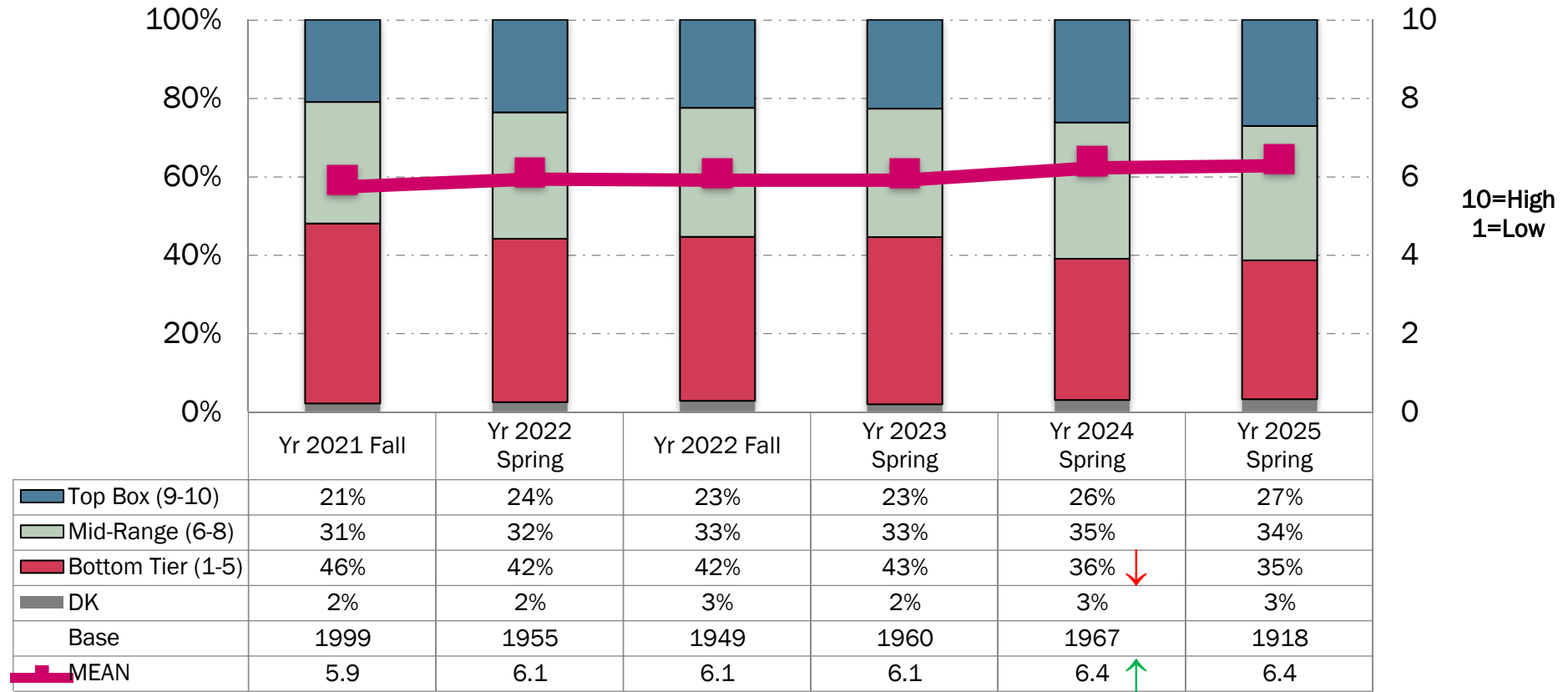
Q4.12 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



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

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



Q4.14 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*



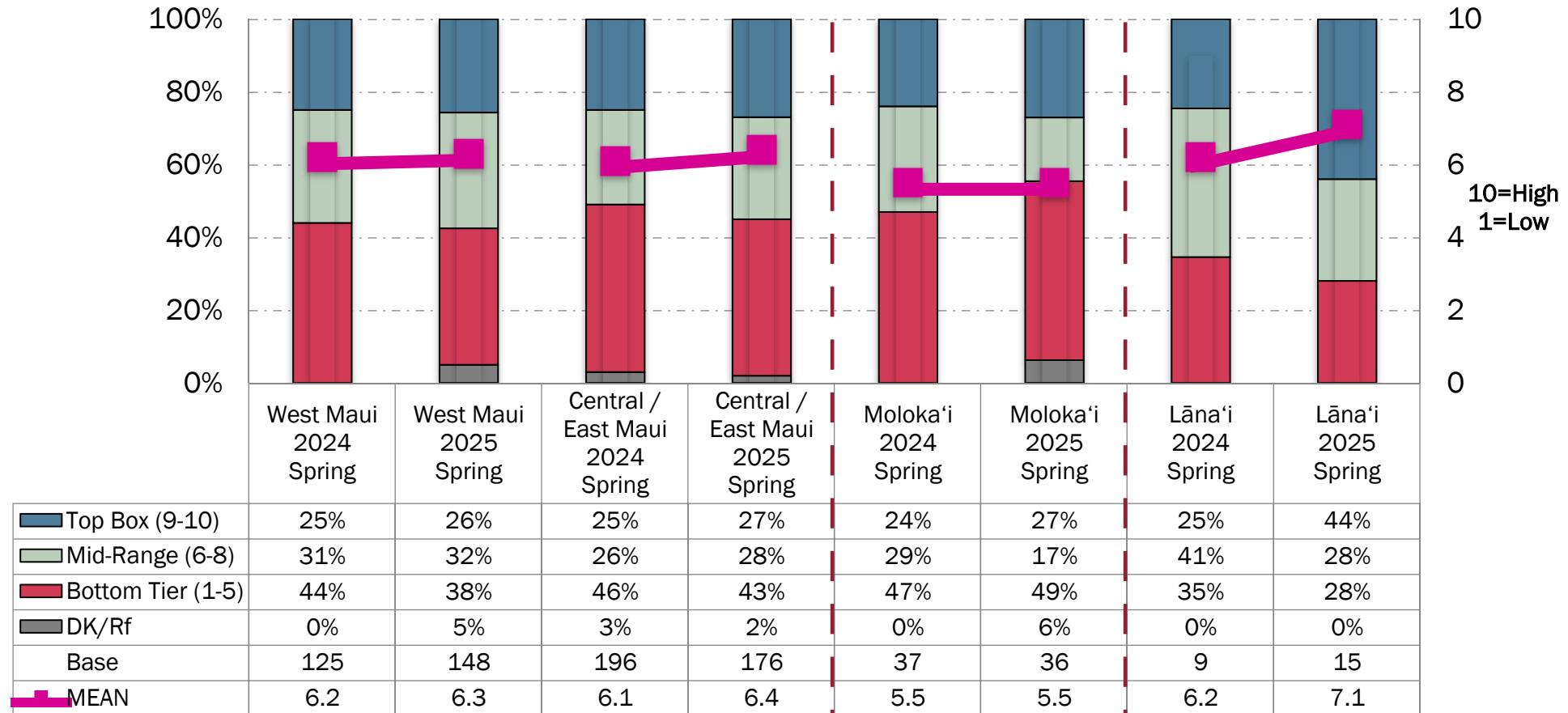
Q4.14 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



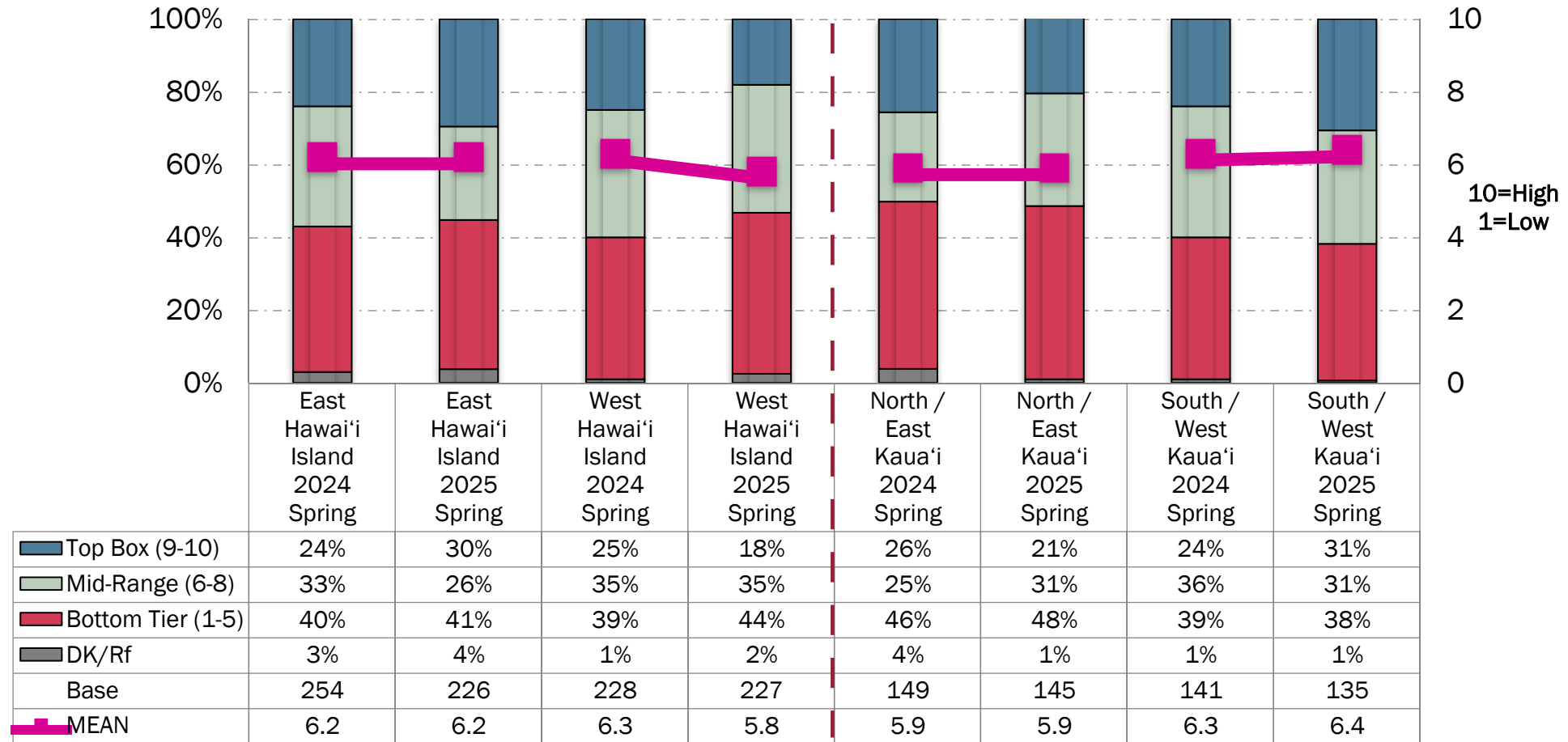
Q4.14 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



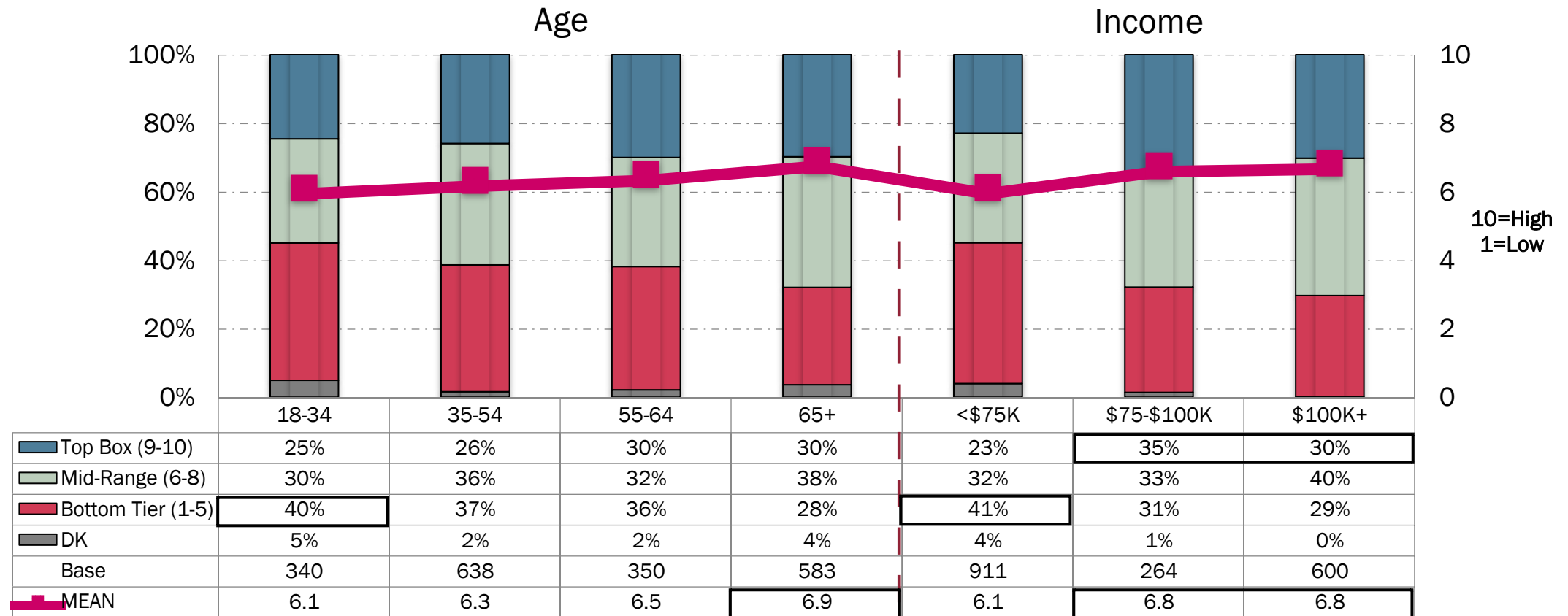
Q4.14 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



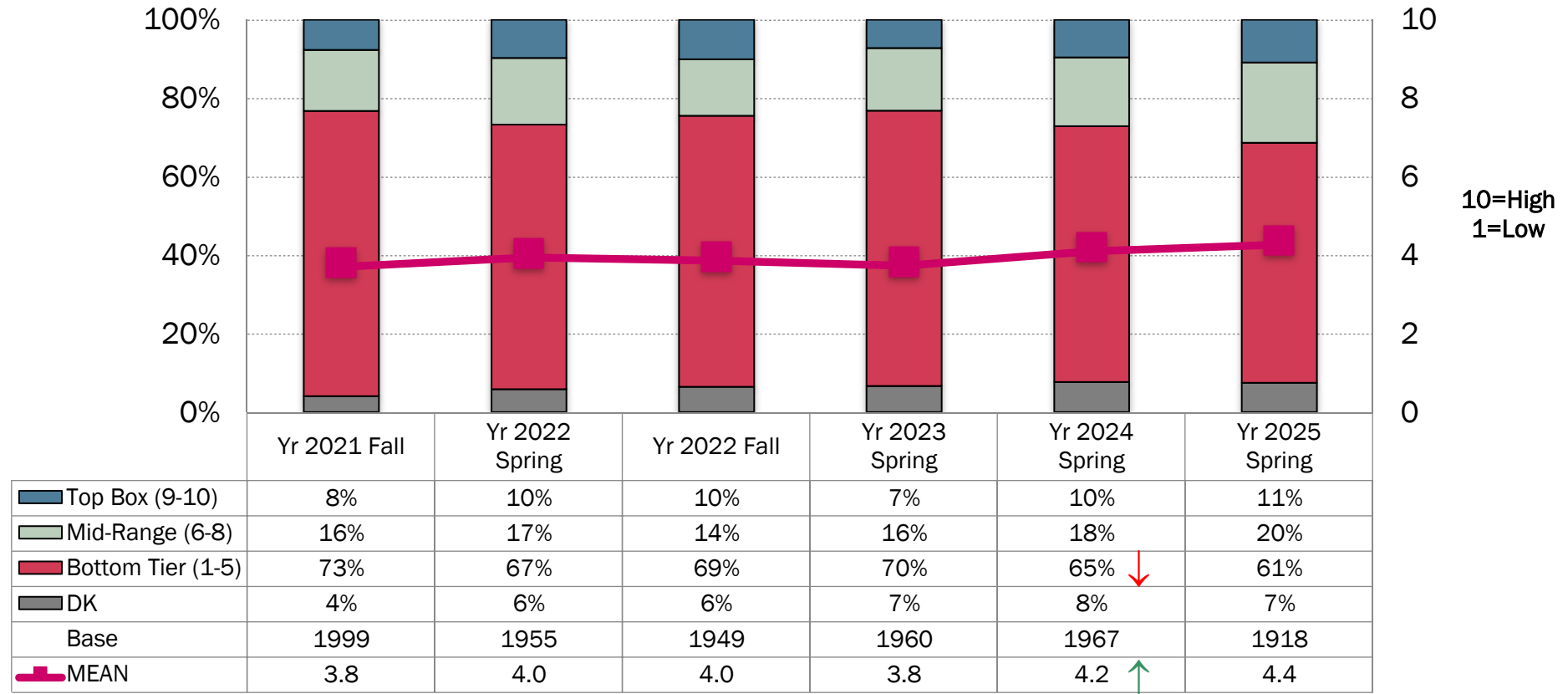
Q4.14 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



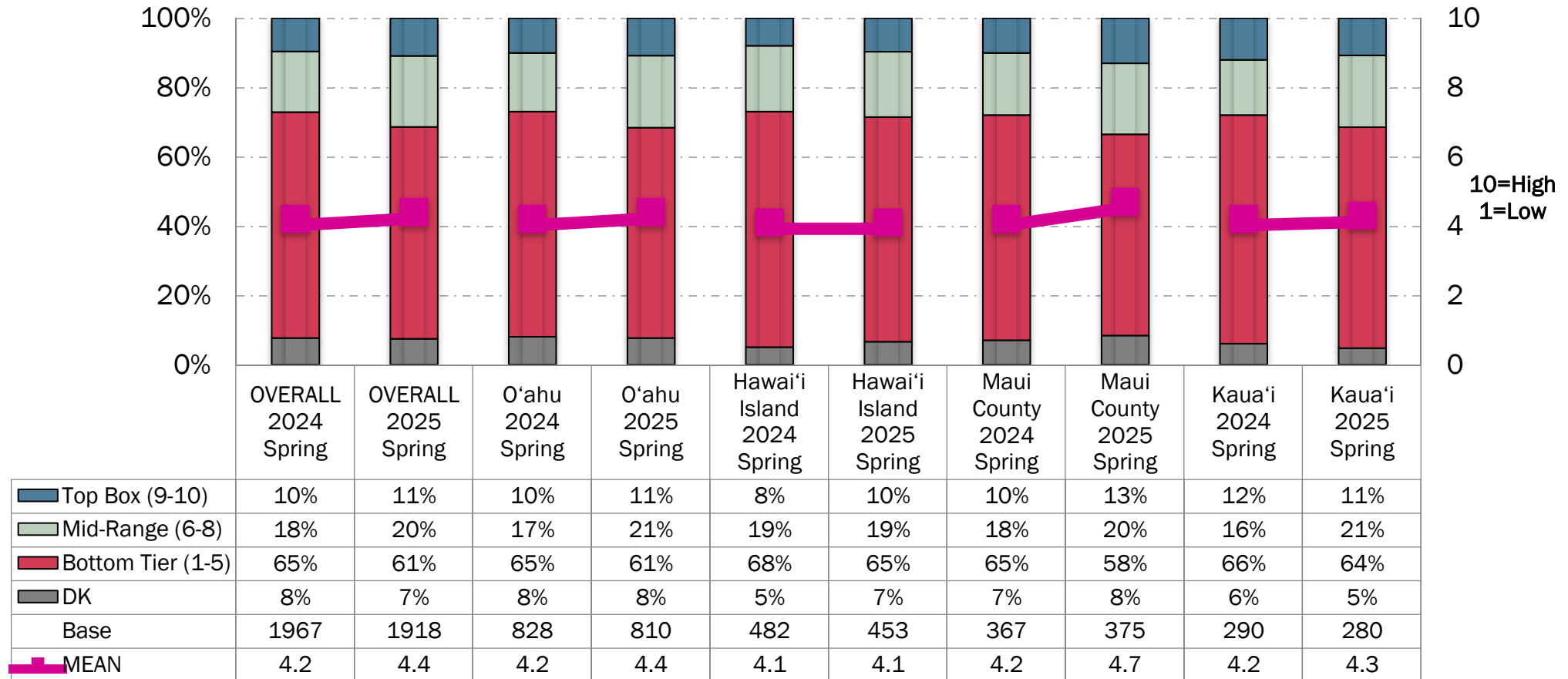
Q4.14 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.15 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



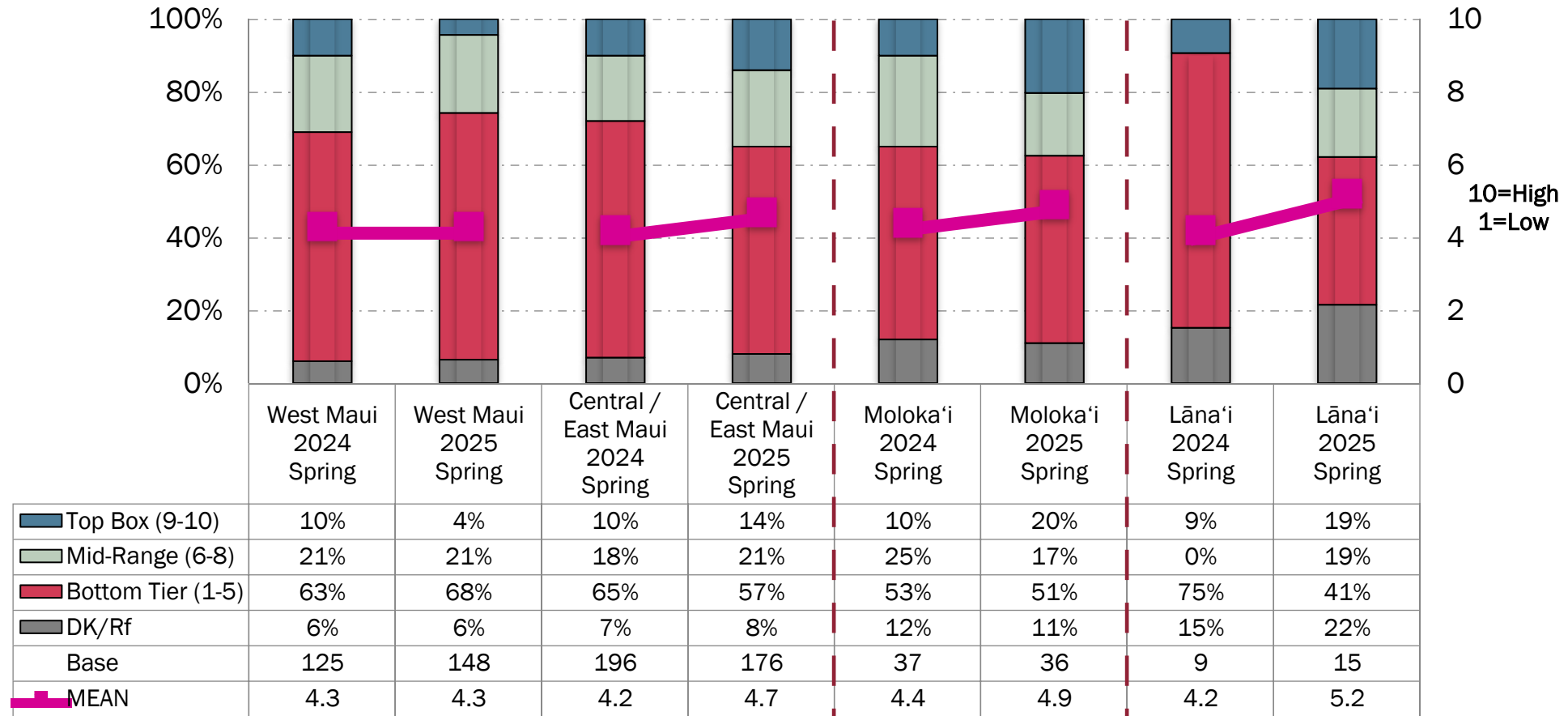
Q4.15 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



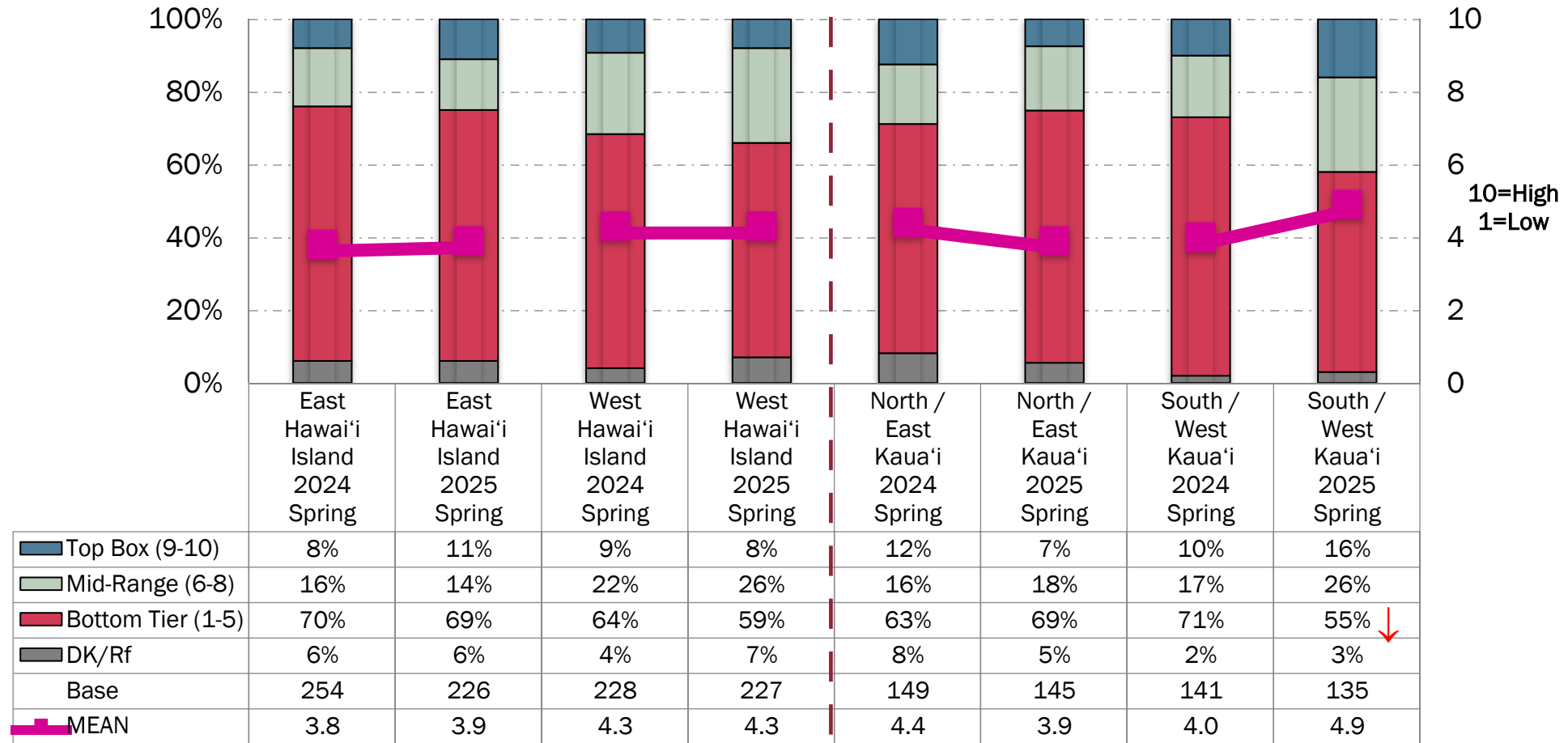
Q4.15 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



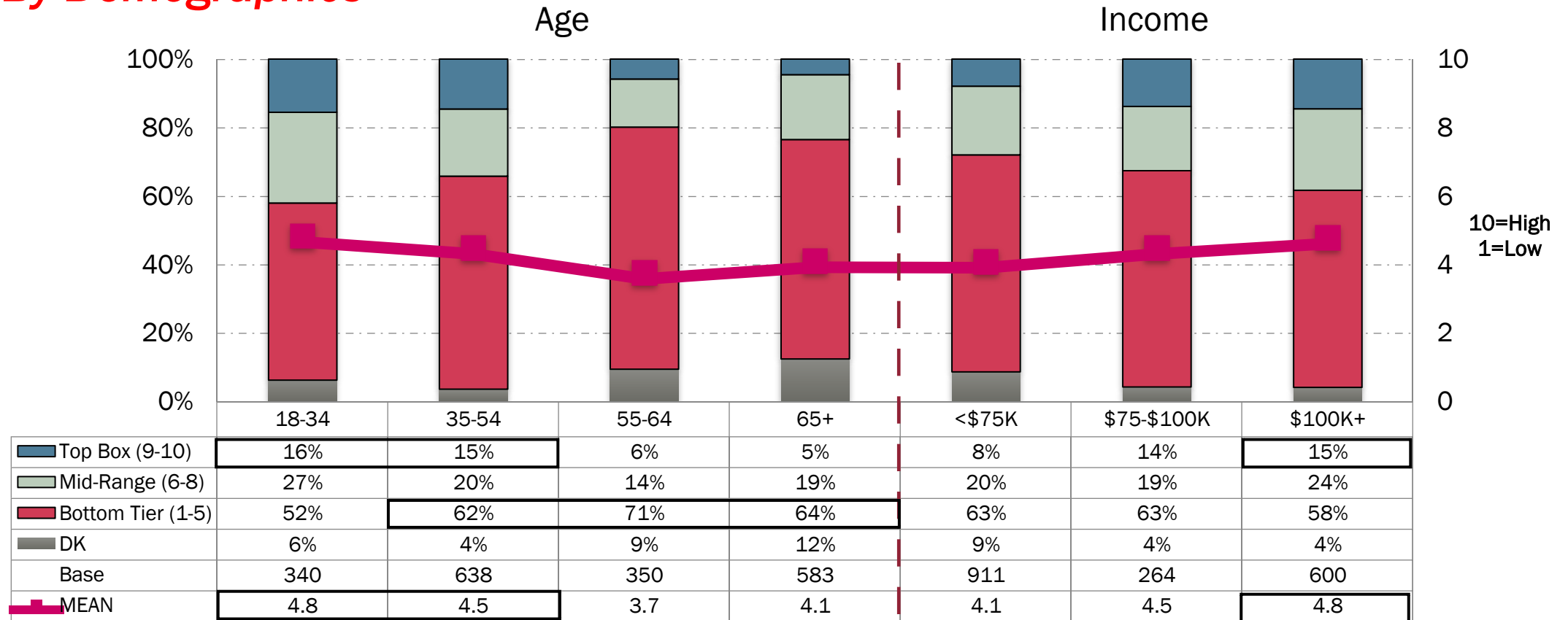
Q4.15 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



Q4.15 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*



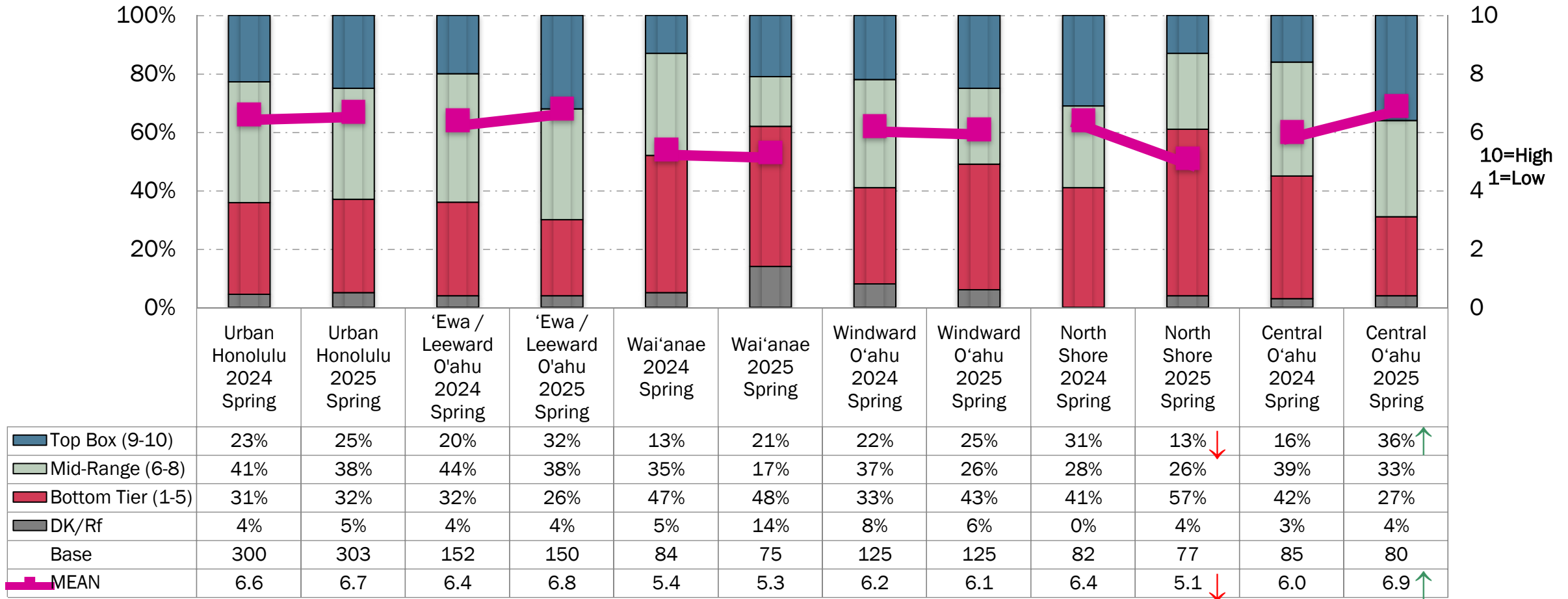
Q4.15 Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



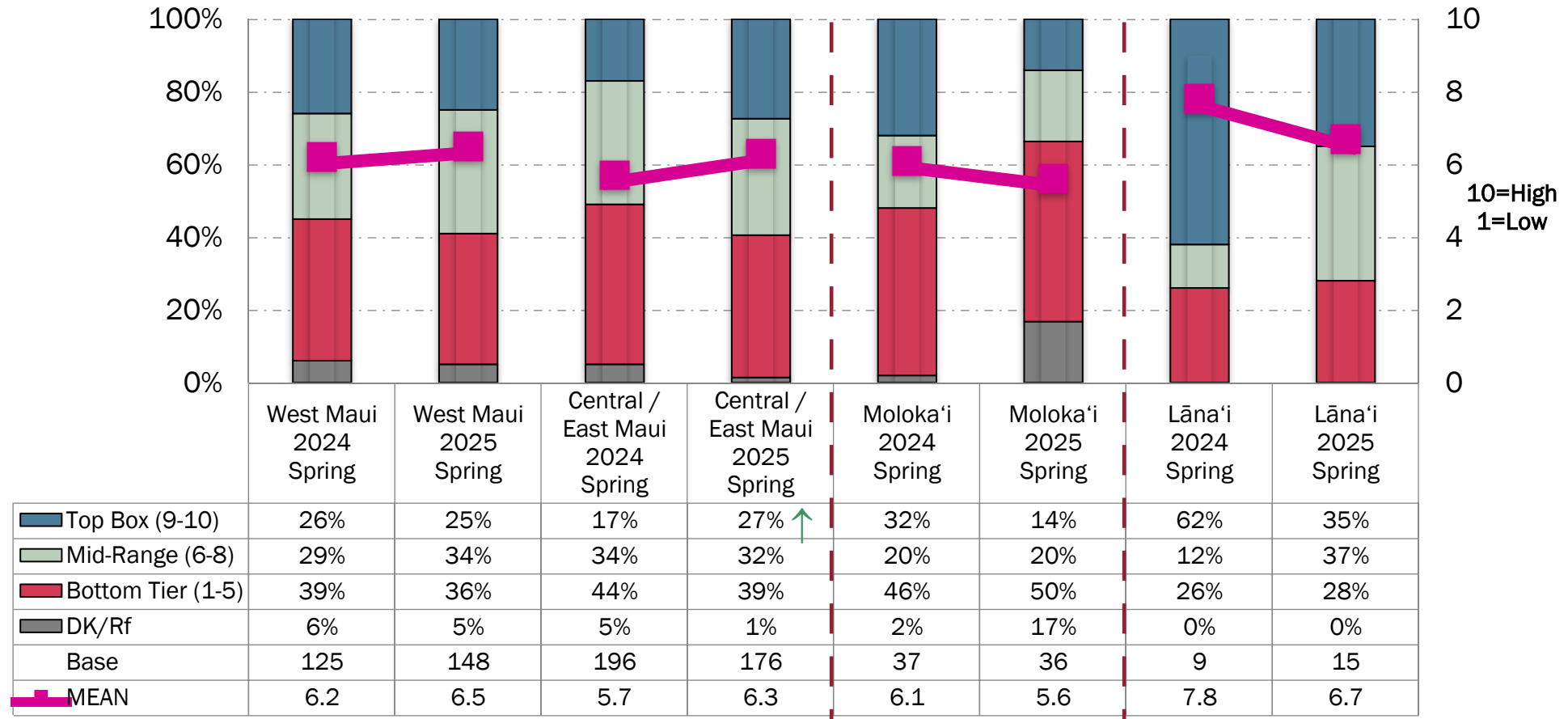
Q4.8 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



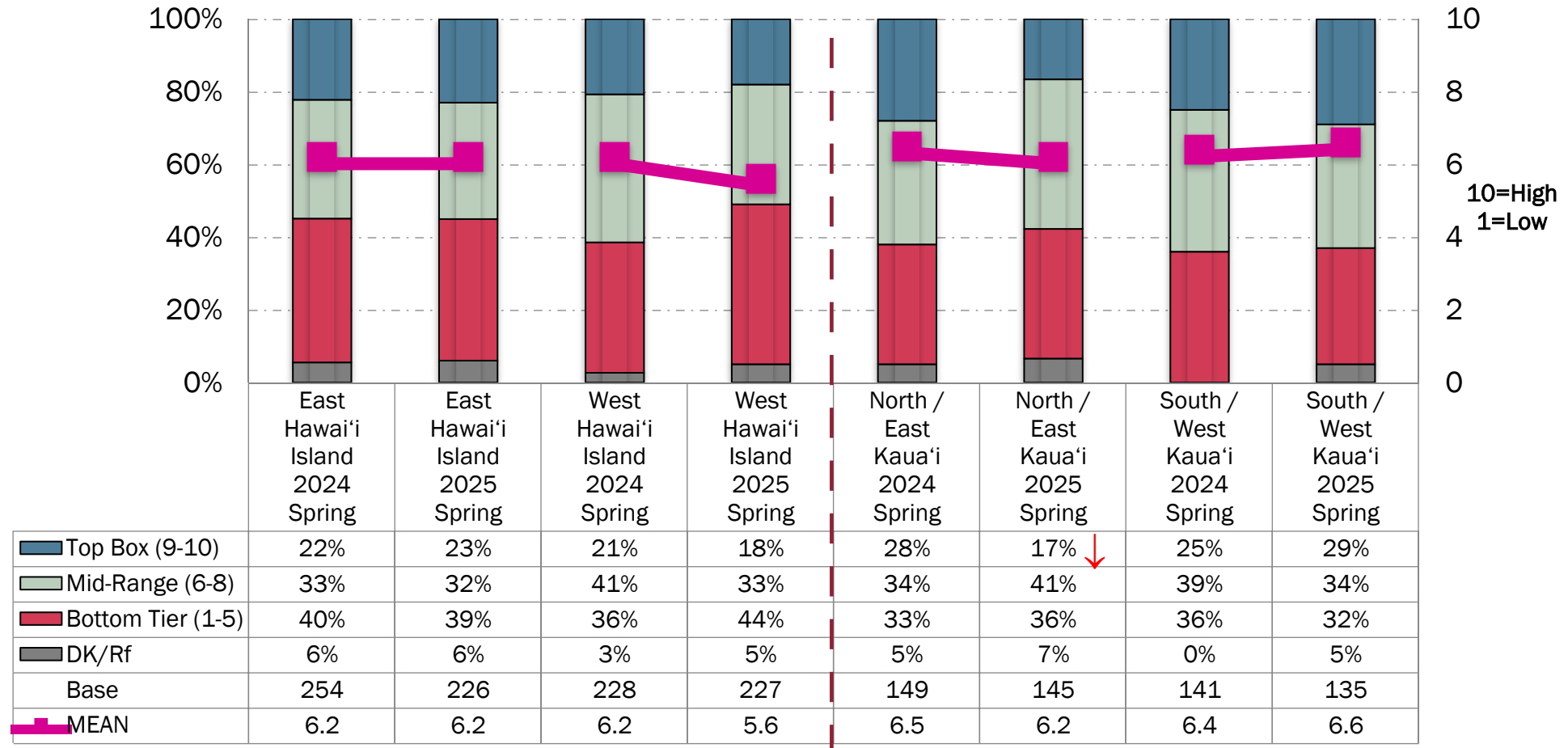
Q4.8 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



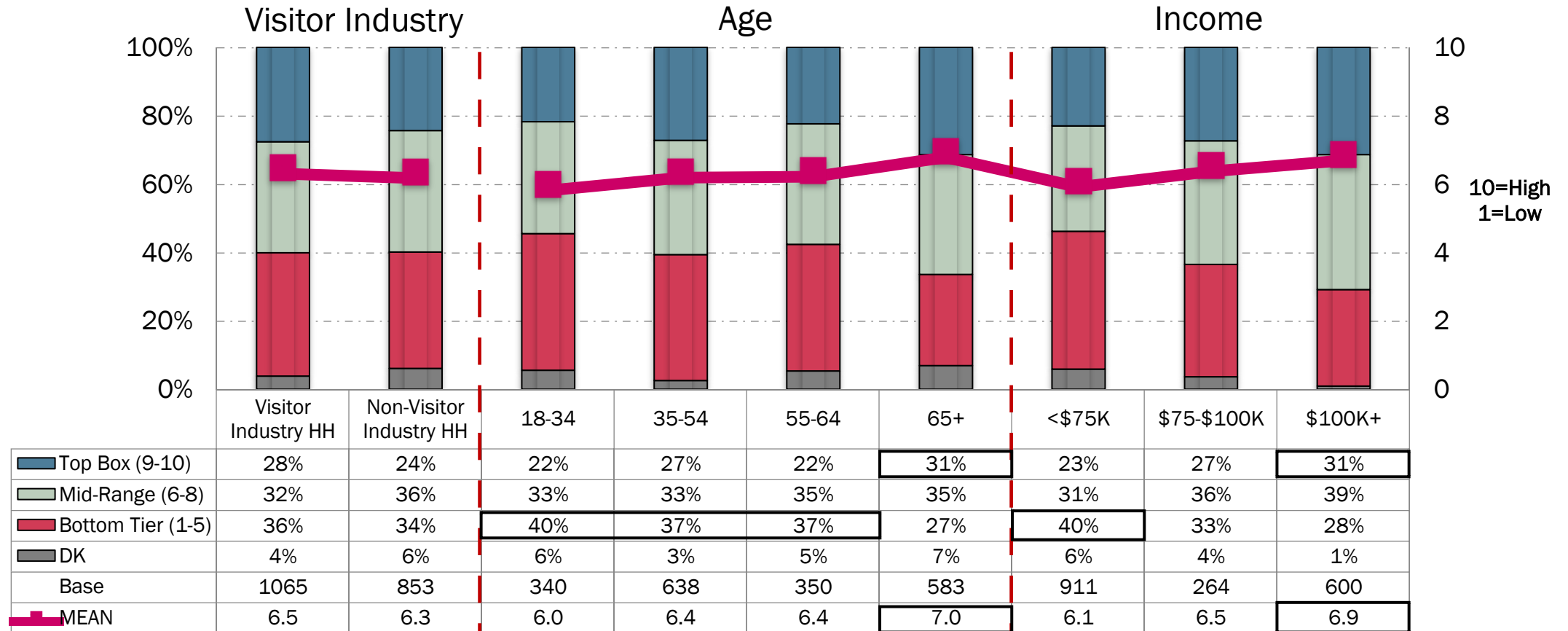
Q4.8 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



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.

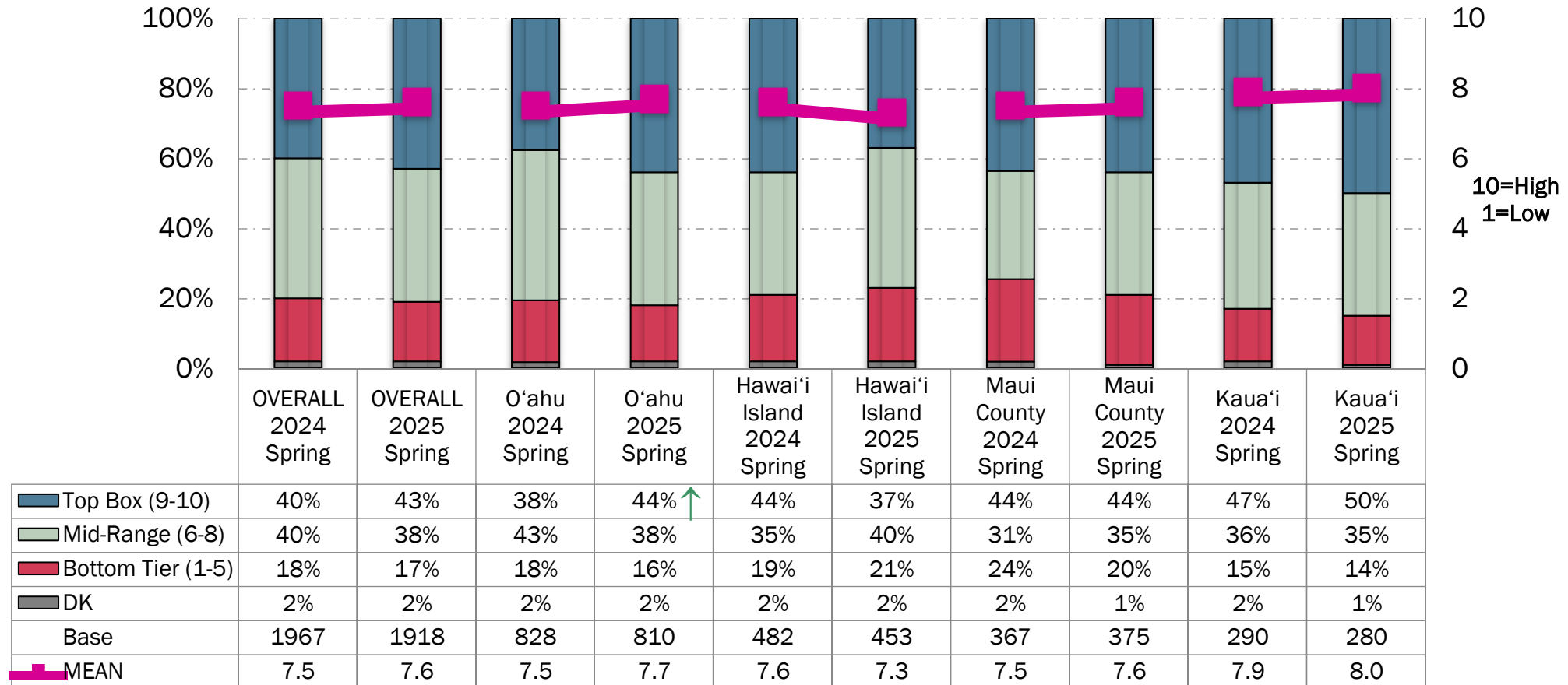
“Tourism supports other industries important to residents like agriculture and technology” - *By Demographics*



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.

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

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



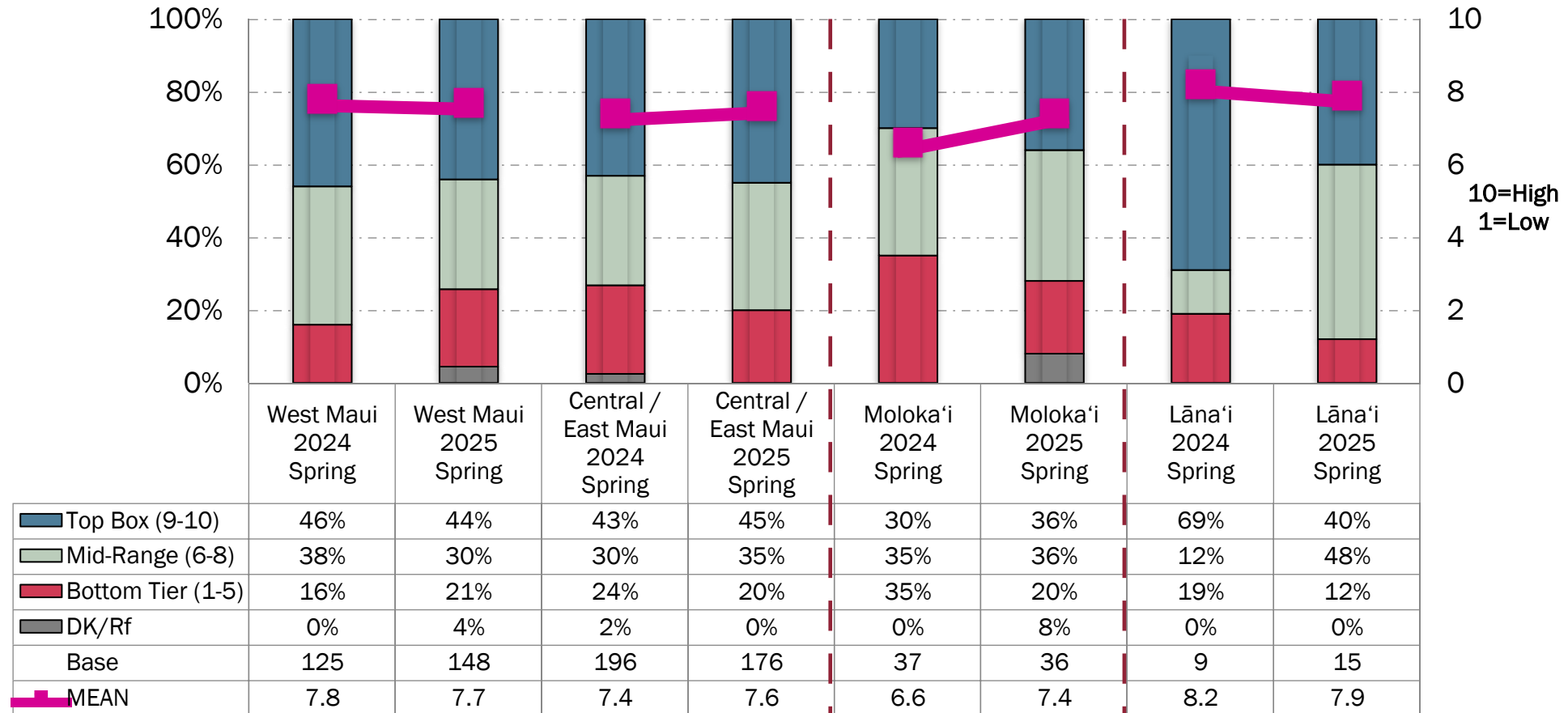
Q4.9 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



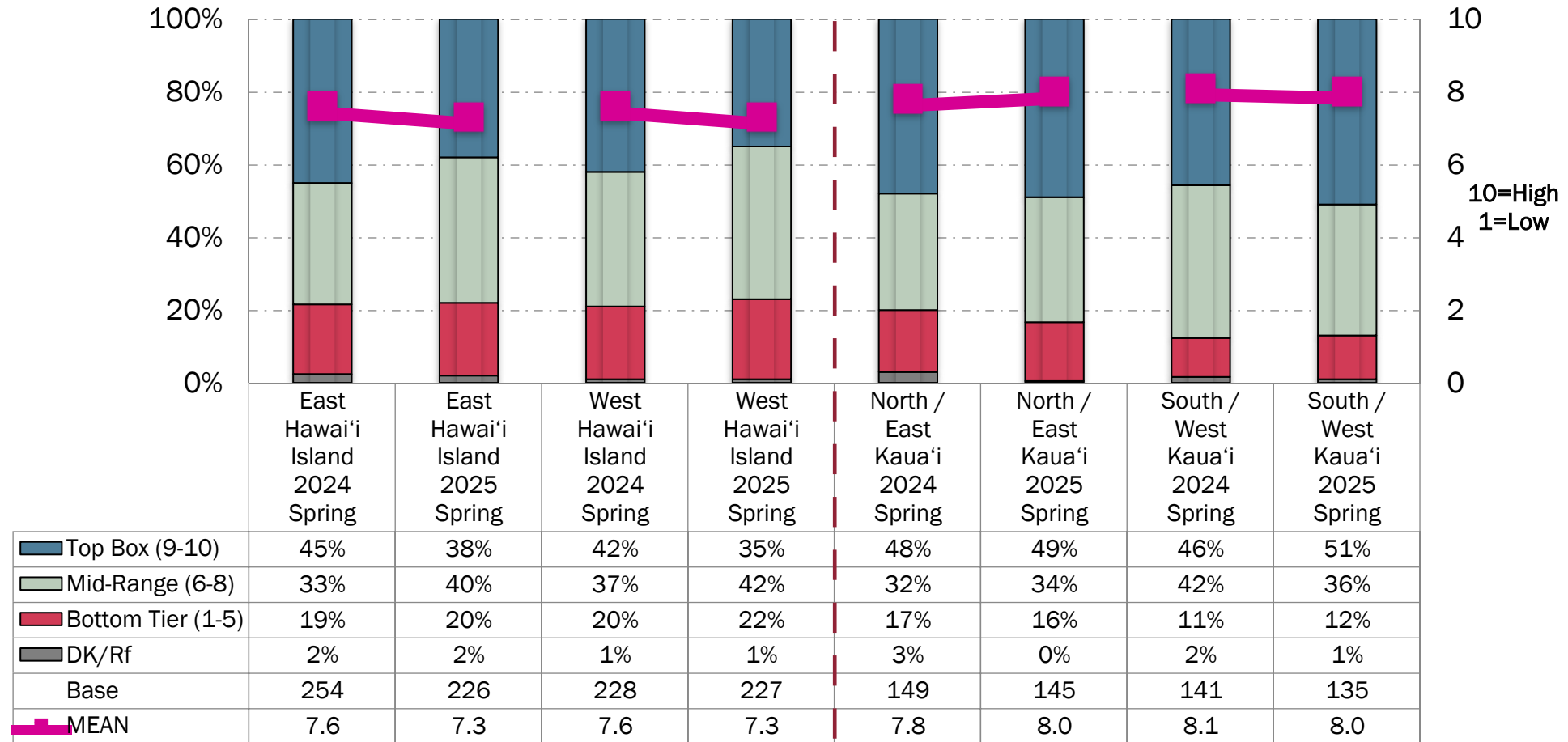
Q4.9 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



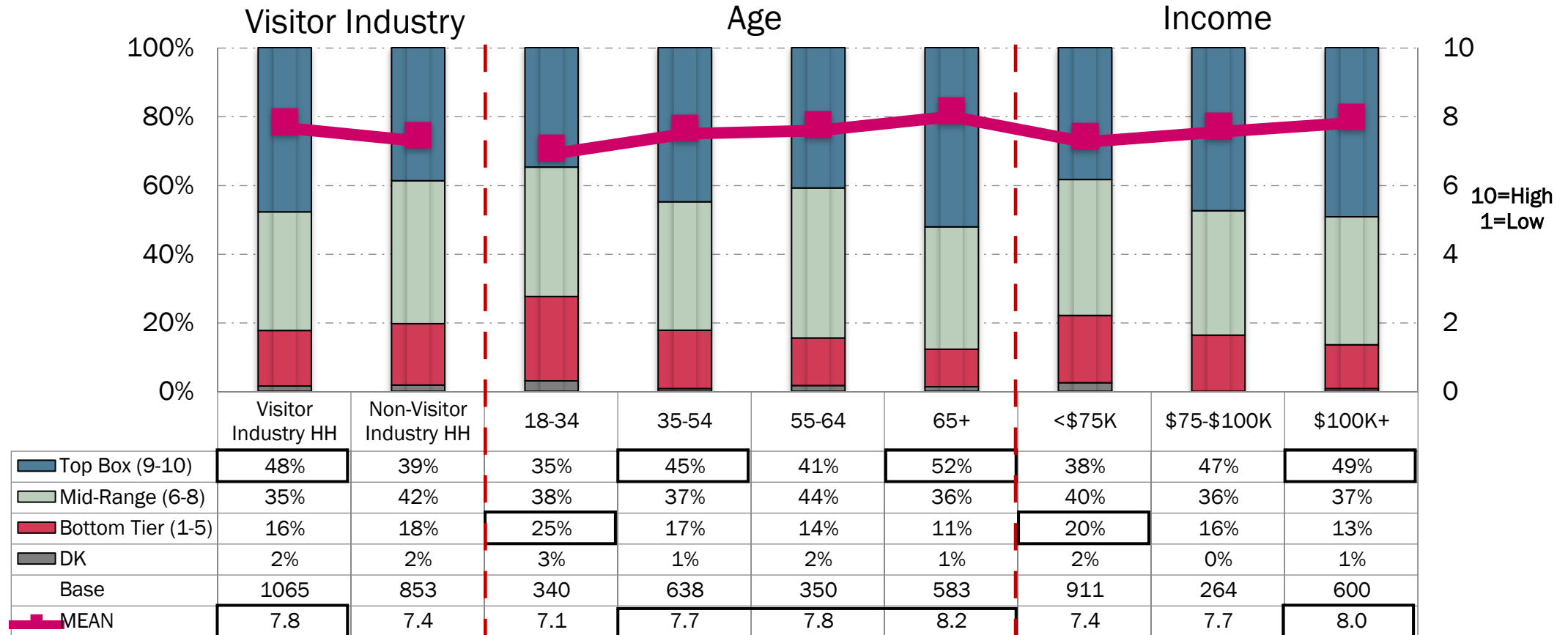
Q4.9 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



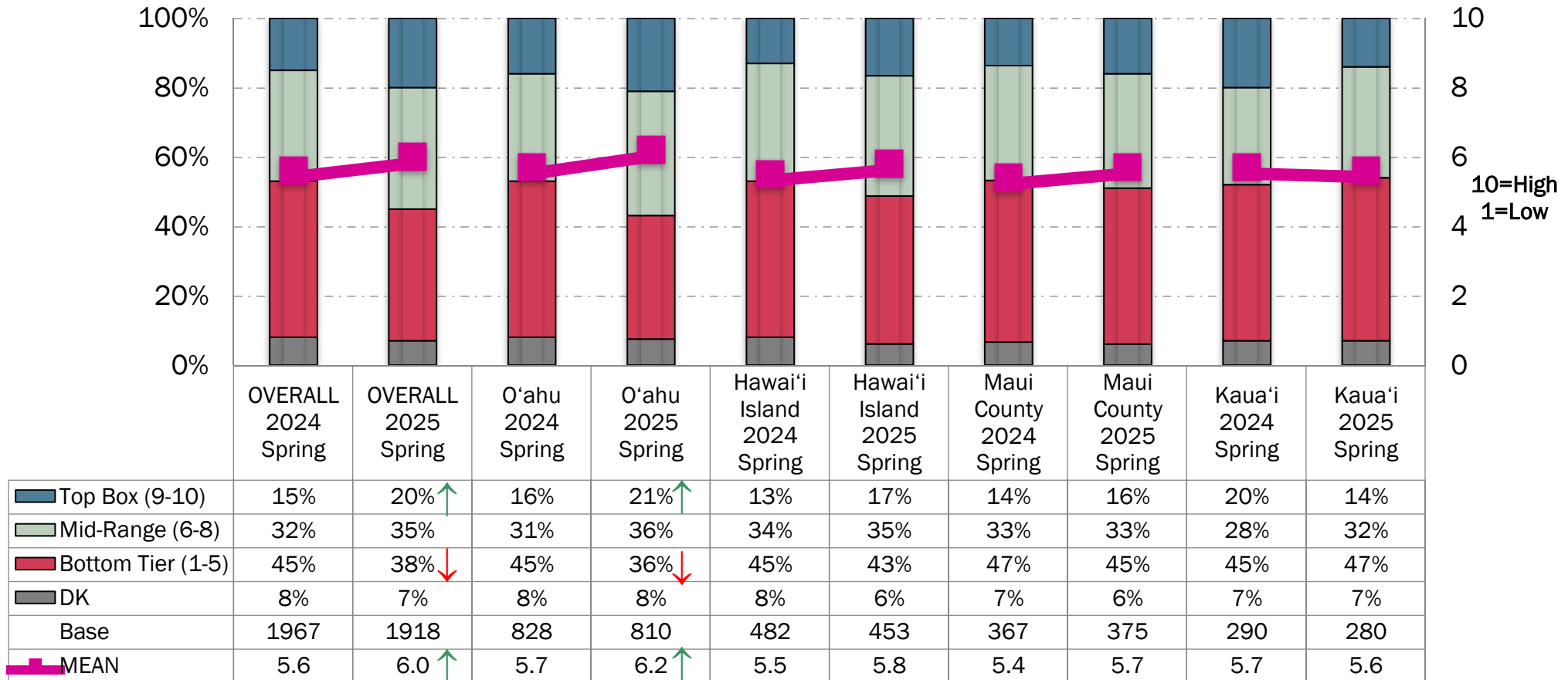
Q4.9 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



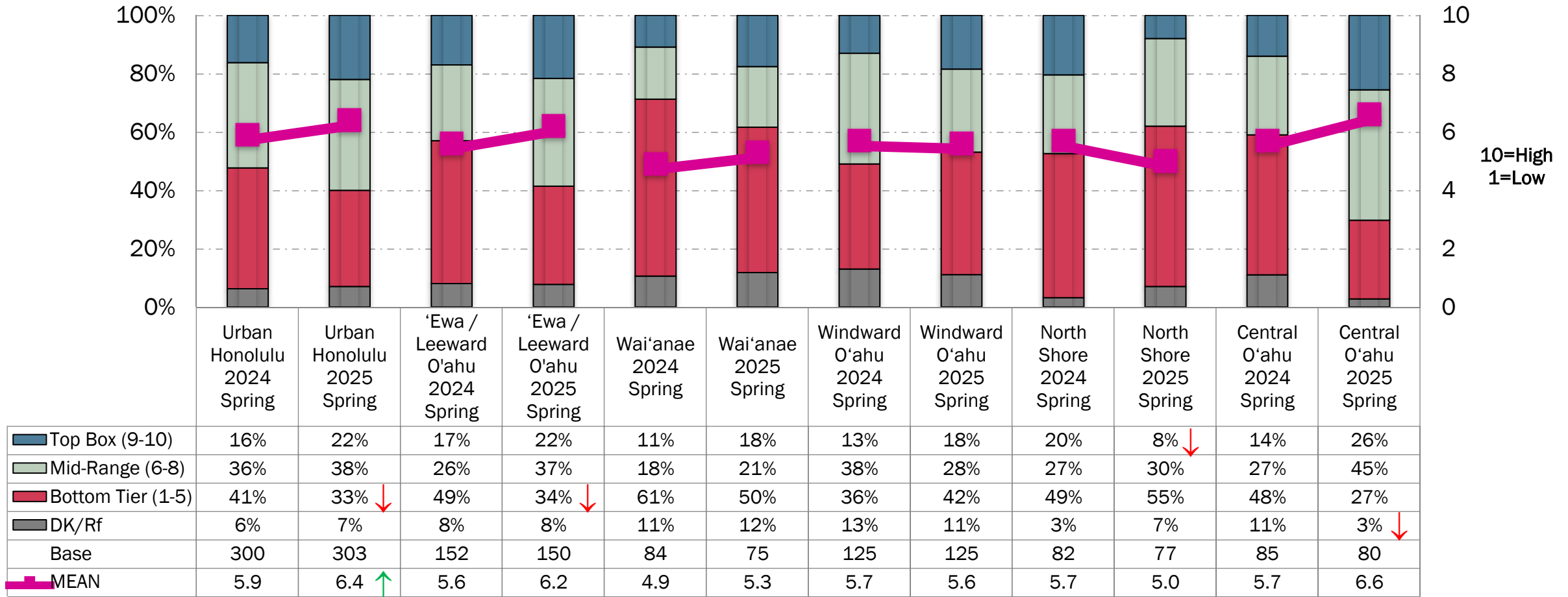
Q4.9 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



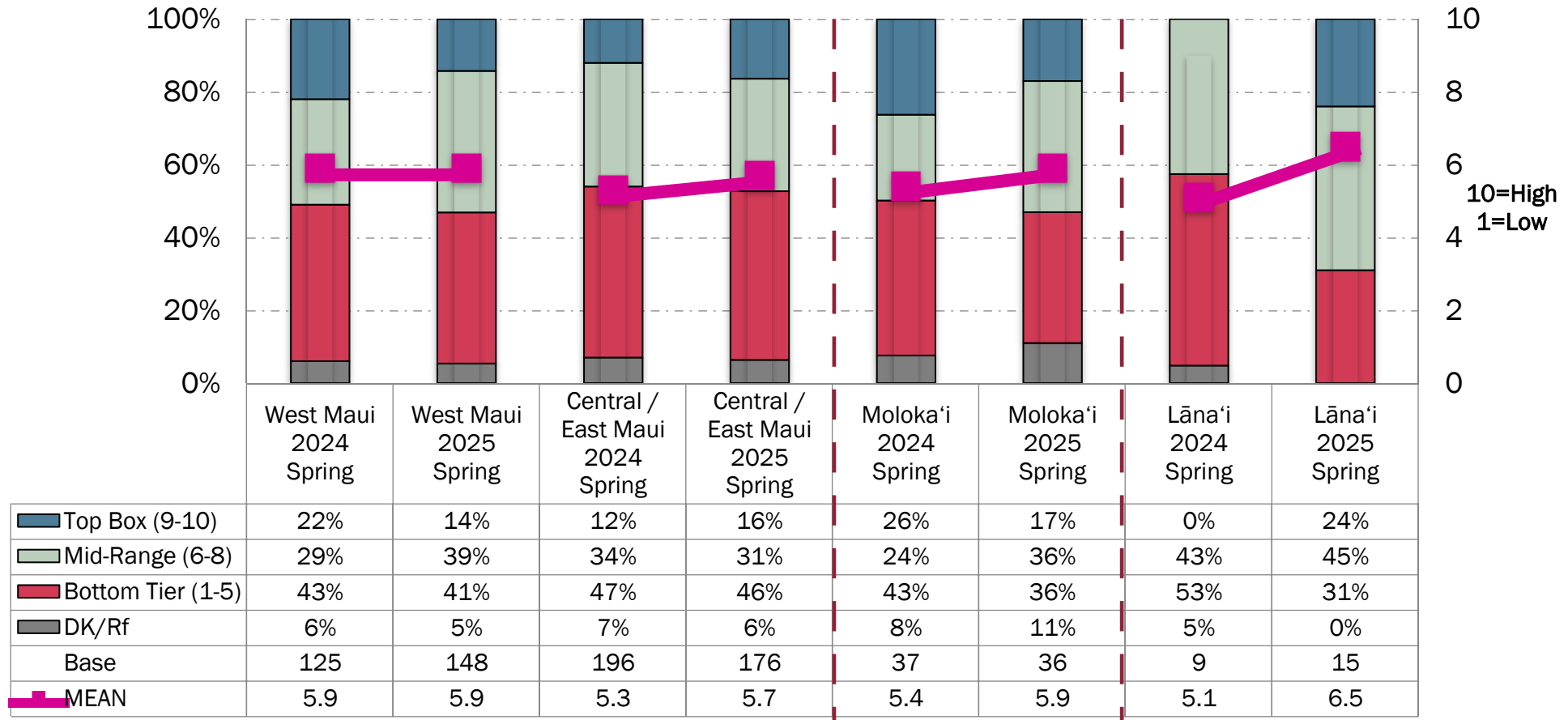
Q4.17 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



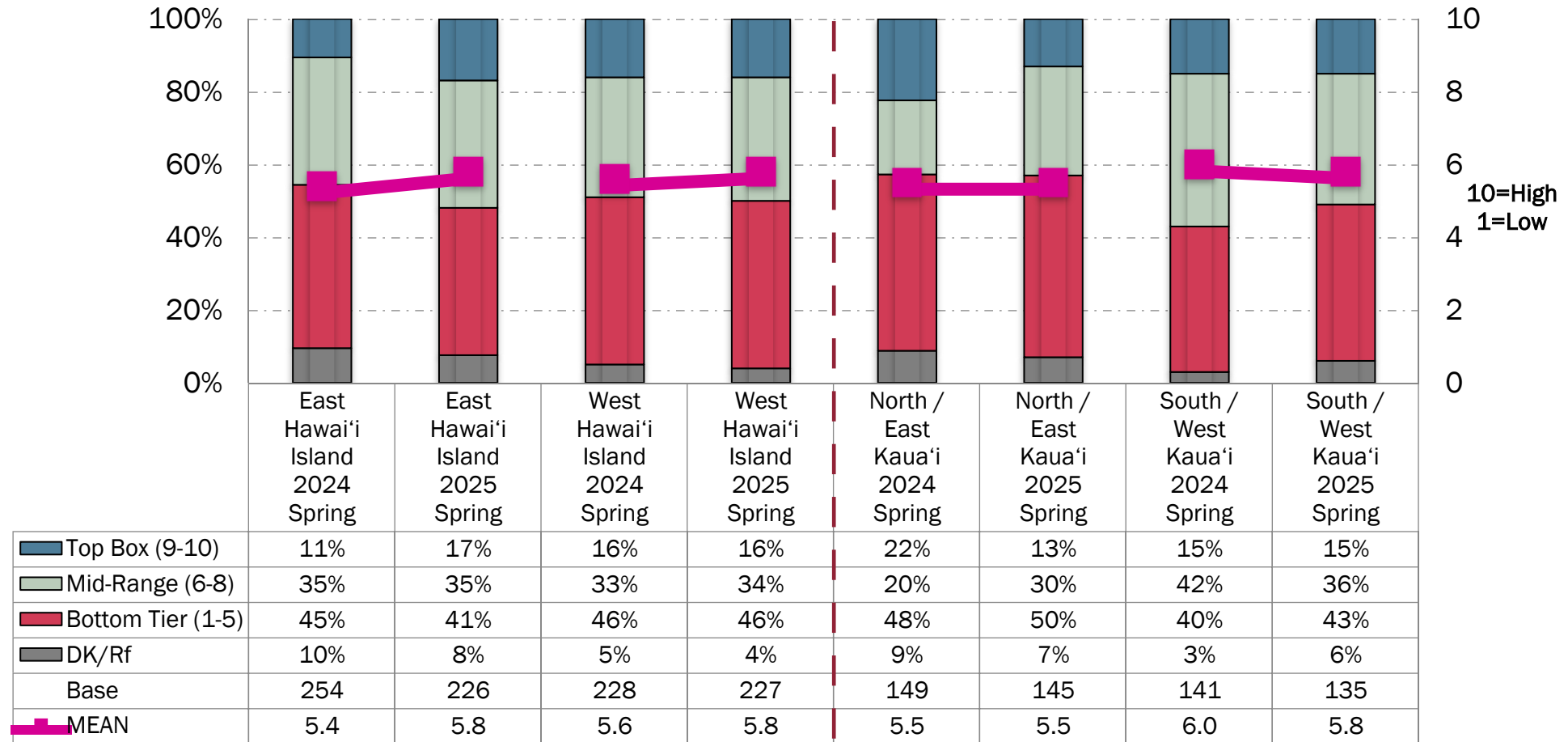
Q4.17 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



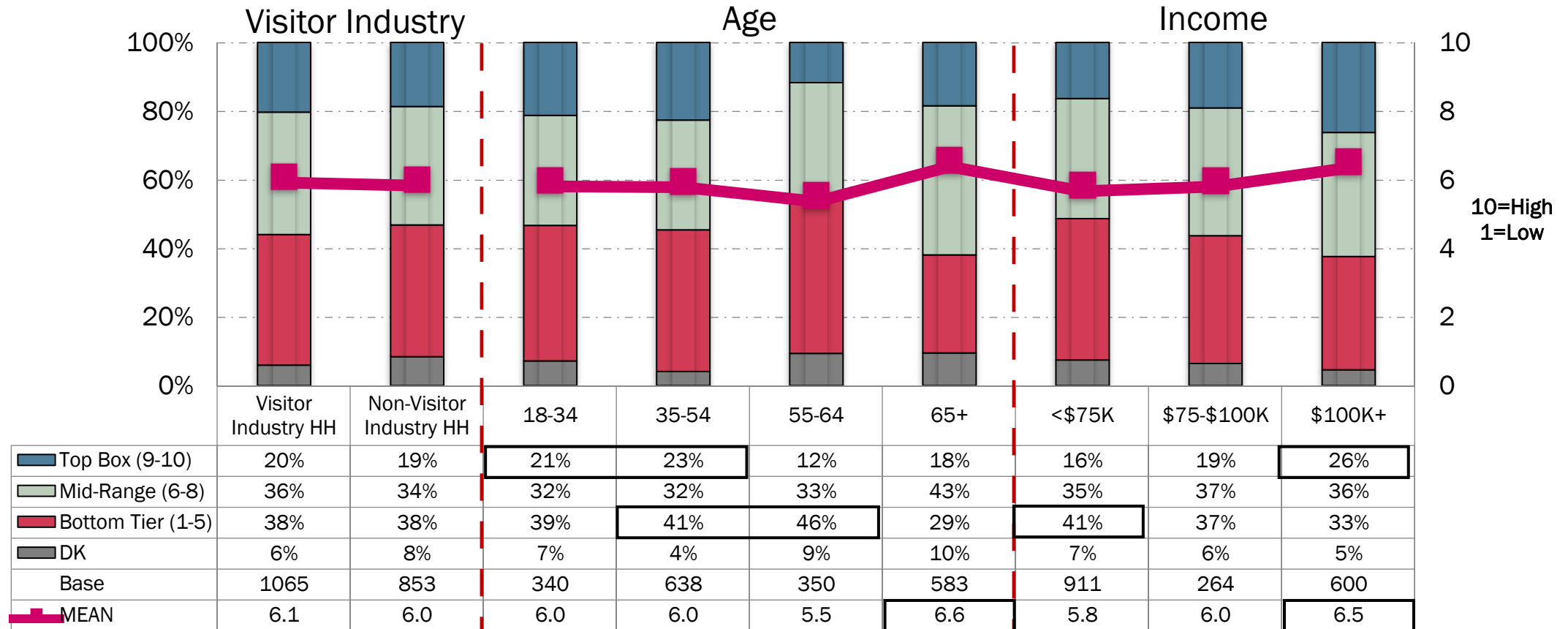
Q4.17 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



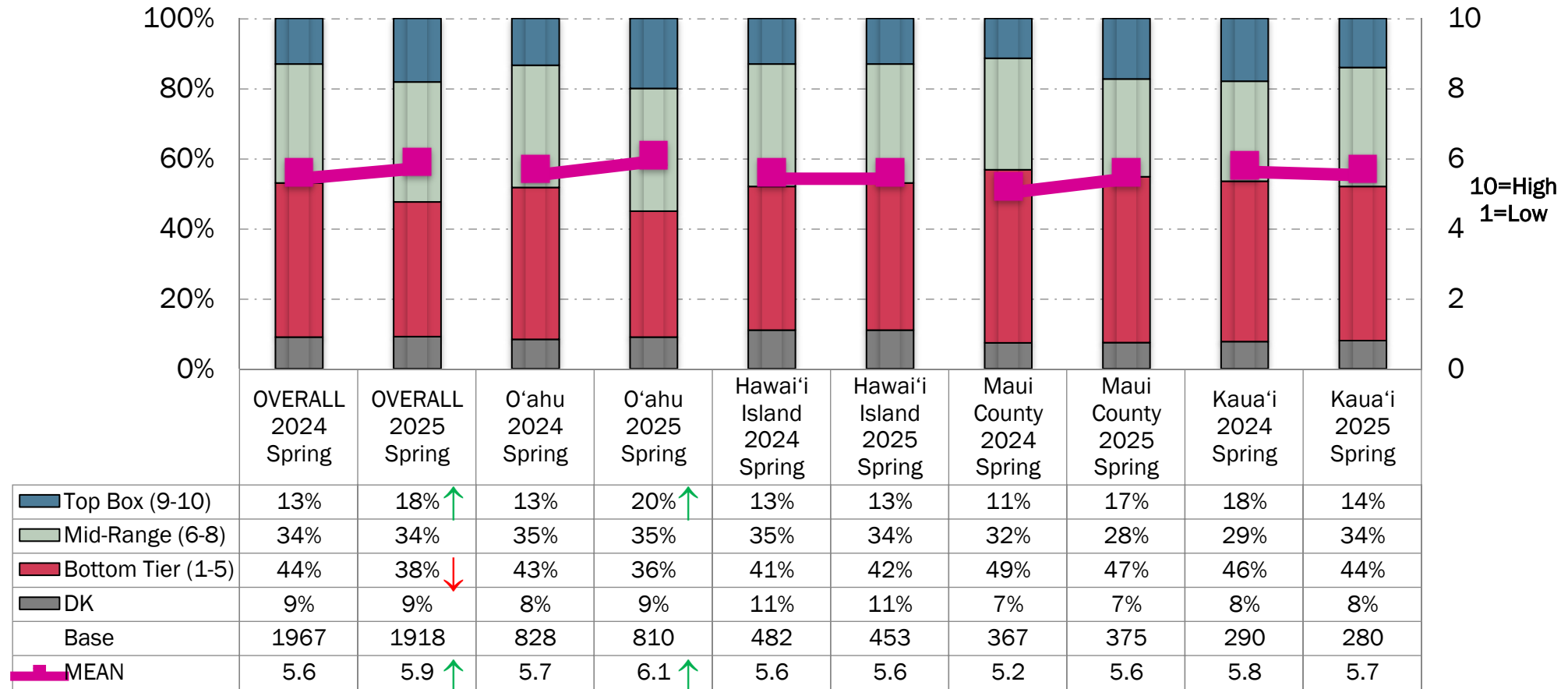
Q4.17 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



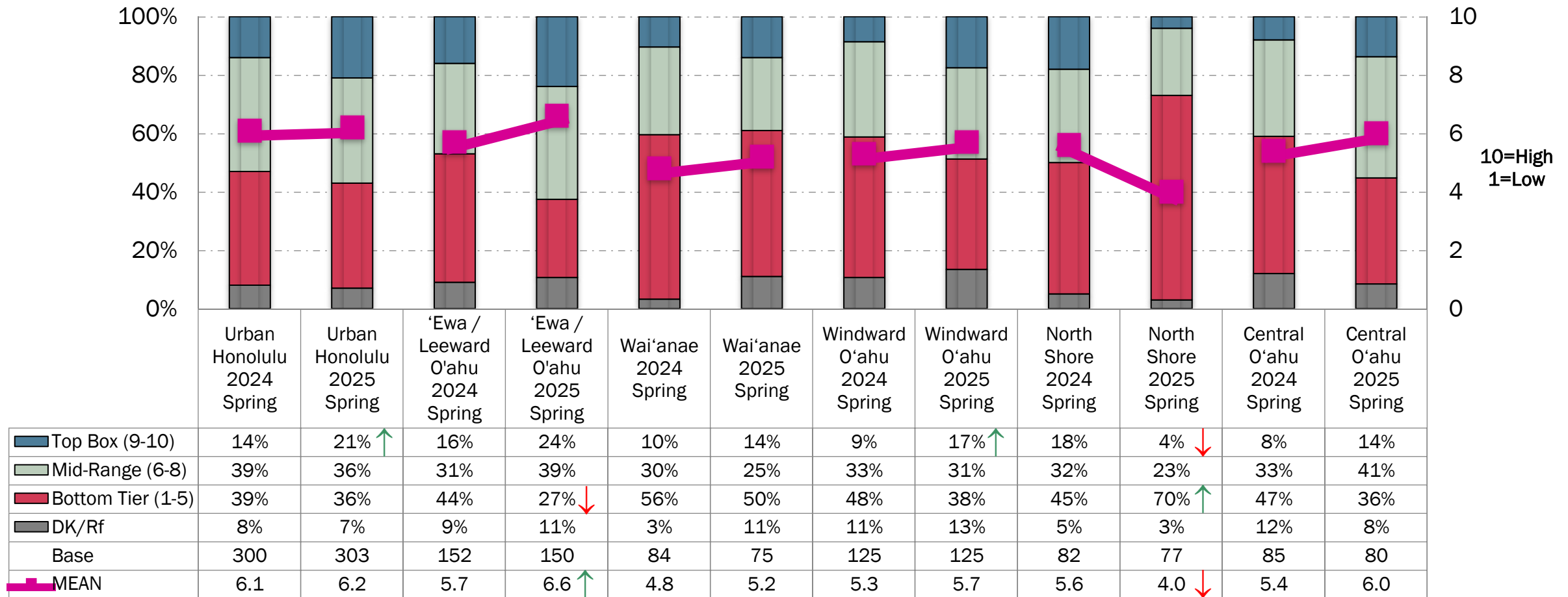
Q4.17 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



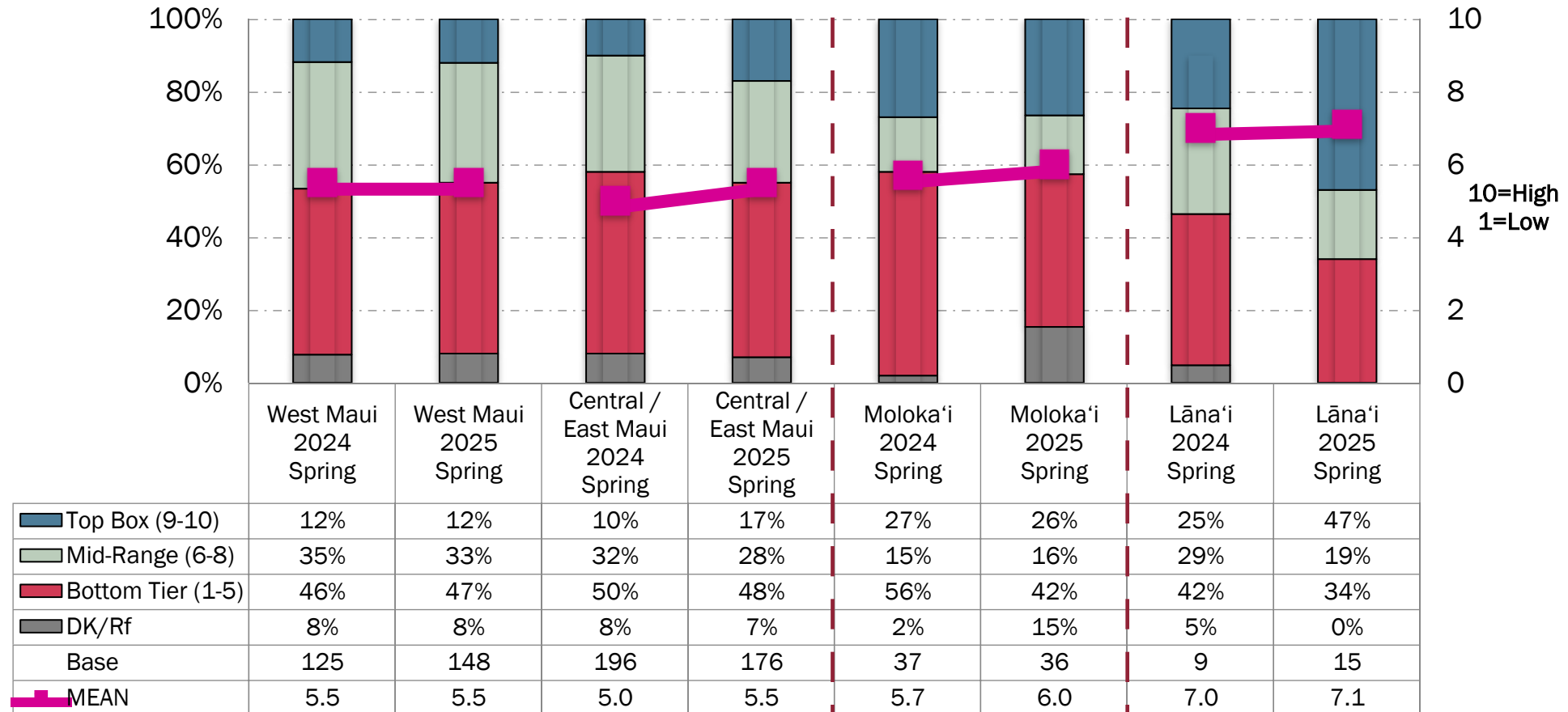
Q4.18 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like tourism is being better managed on my island” – *By Area (O‘ahu)*



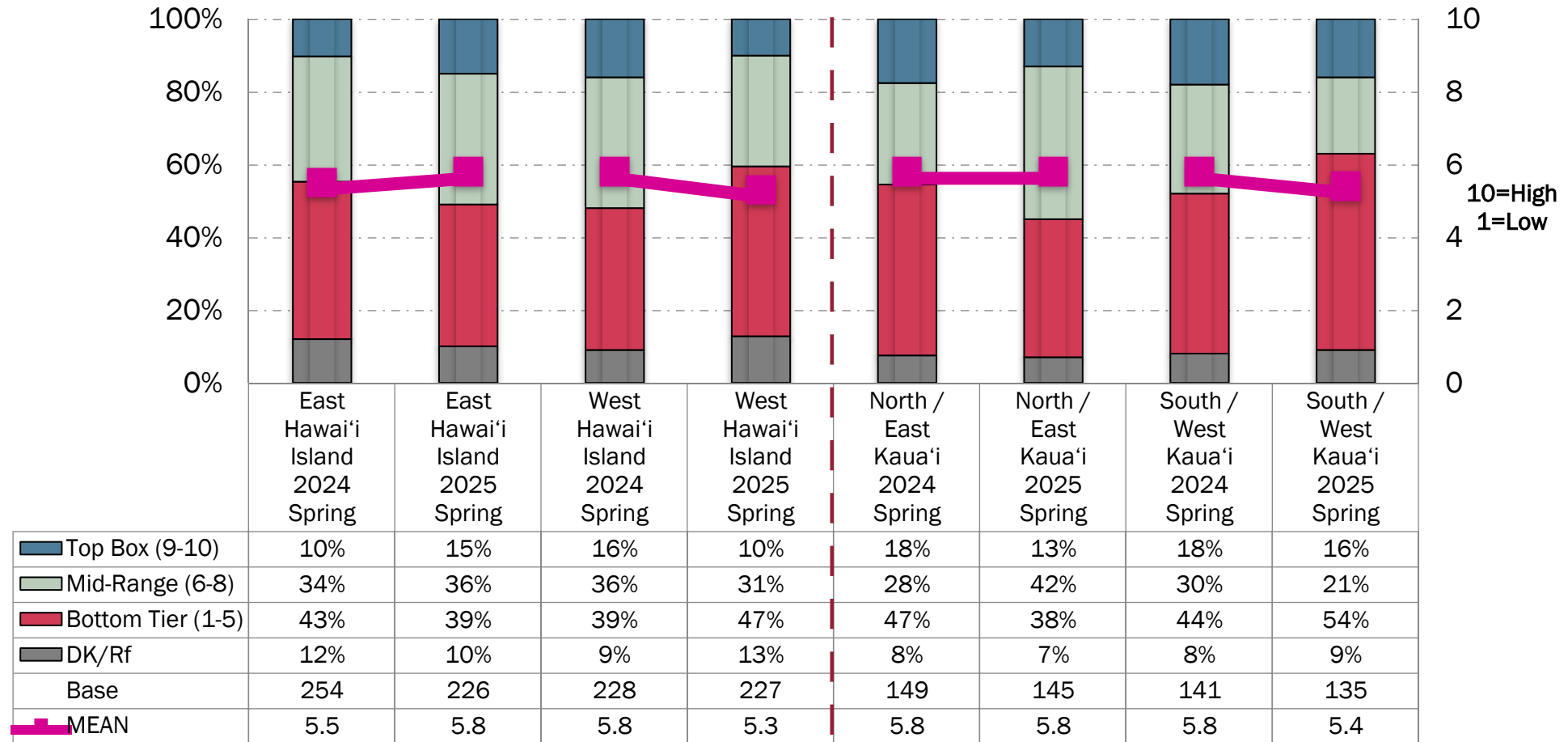
Q4.18 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



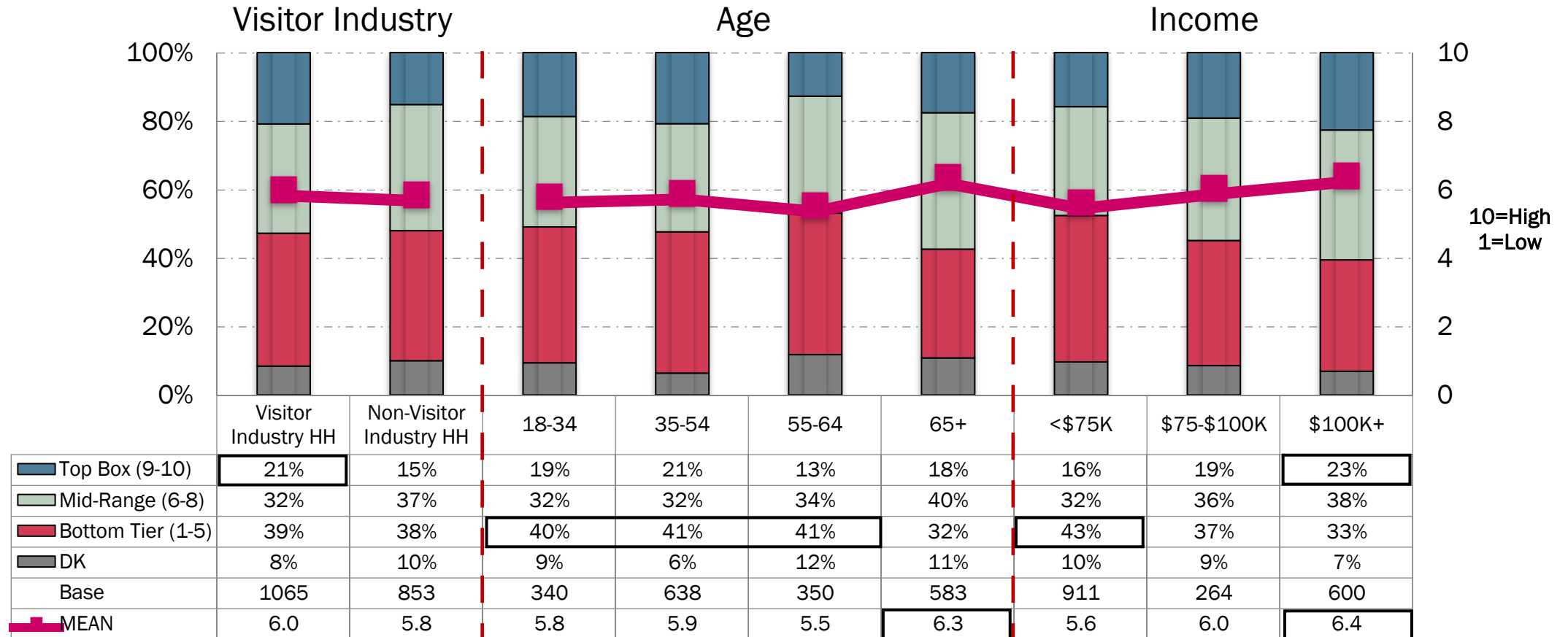
Q4.18 Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



Q4.18 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*



Q4.18 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.

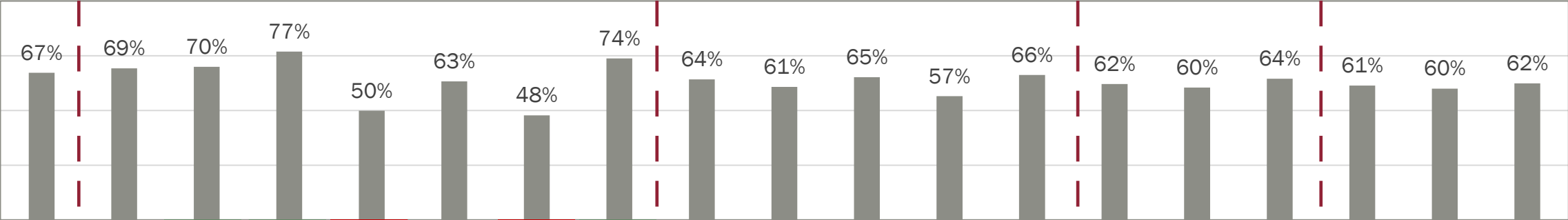
Appendix A: Island Supplement



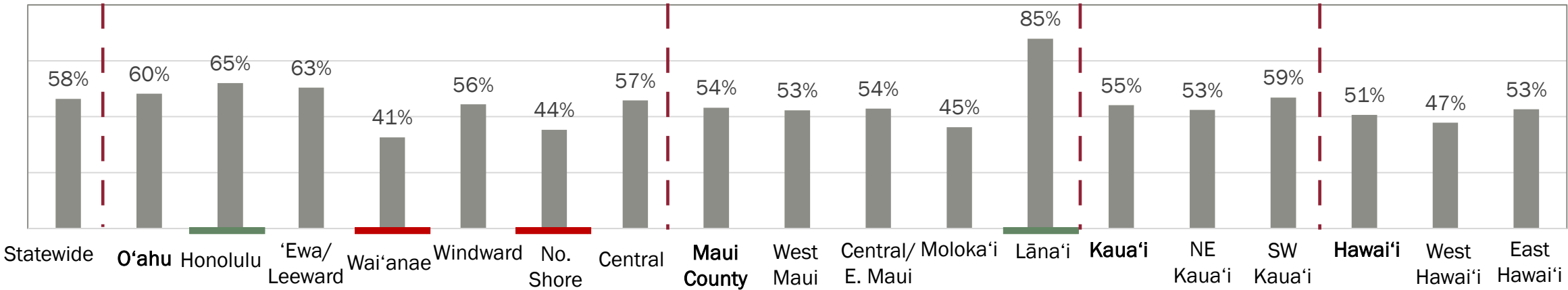
Island Supplement: Tourism is Worth the Issues; Benefits Outweigh Problems by Island/Area

On the community level, Urban Honolulu, ‘Ewa/Leeward, and Central O‘ahu, report the highest sentiment in the key area that Tourism is worth the issues. Areas with the worst sentiment include: the Wai‘anae coast and the North Shore of O‘ahu.

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



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



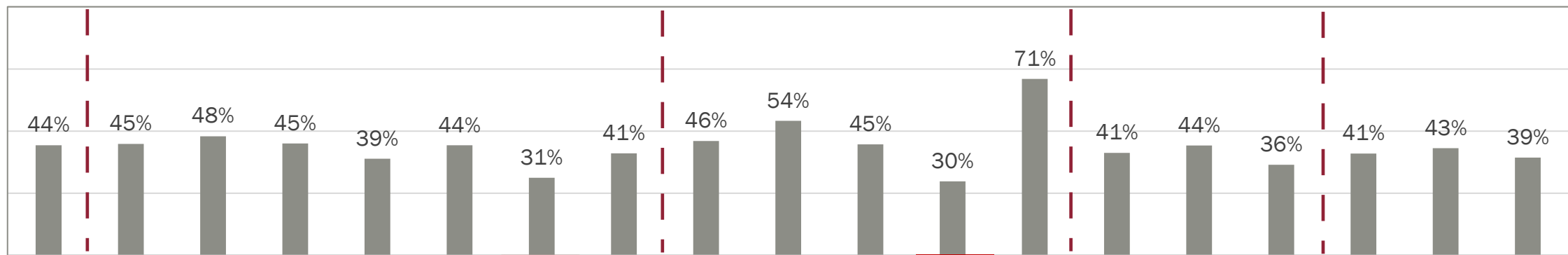
Q3. In 2024, visitors spent nearly \$21 billion in Hawai‘i, which produced more than \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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.

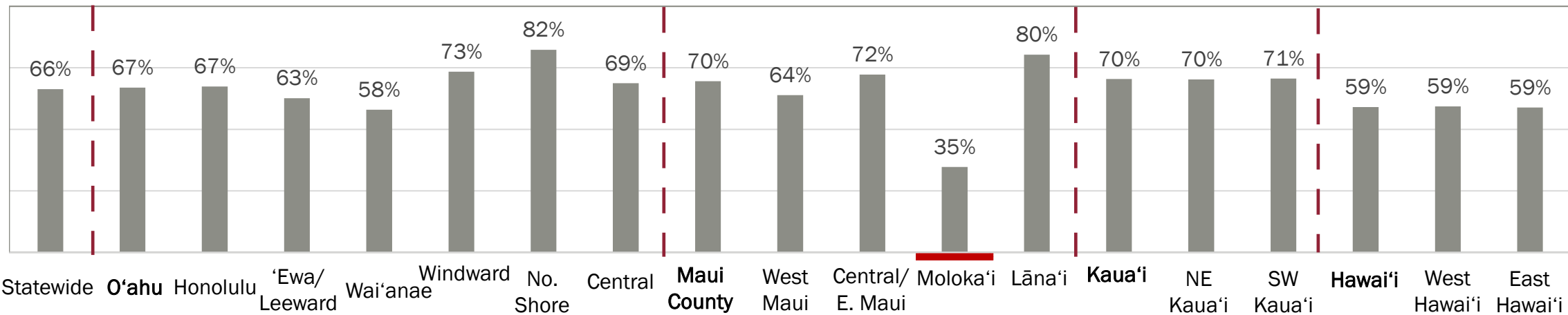
Island Supplement: Key Indicators by Island/Area (continued)

Wai‘anae, O‘ahu’s North Shore, and Moloka‘i report the weakest sentiment on viewing tourism as positive for their families, aligning with their doubts that the industry’s benefits outweigh its problems. The overlap underscores how personal and community skepticism toward the industry reinforce one another in these areas.

“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.

Key Recommendations and Takeaways – O‘ahu

- 1 **Reflective of the State as a whole, perception of tourism trends upward on O‘ahu:** Positive sentiment indicators continue to climb, albeit modestly. Perceptions that tourism is now better managed have pushed past the 6-point threshold, suggesting stewardship efforts are registering. Still, many residents feel the island is run mainly for visitors, a concern that though easing, remains noticeable.

Key Resident Sentiment Tracking Statements (O‘ahu)

Mean Score	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Tourism has brought more benefits than problems	6.11	5.97	6.14	6.35
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.85	6.55	6.73	6.94
Perceived impact of tourism on you and your family	6.16	6.01	6.34	6.48
Tourism is being better managed on my island	5.50	5.37	5.72 ↑	6.06 ↑
My island is run for tourists at expense of local people	6.93	6.90	6.85	6.83

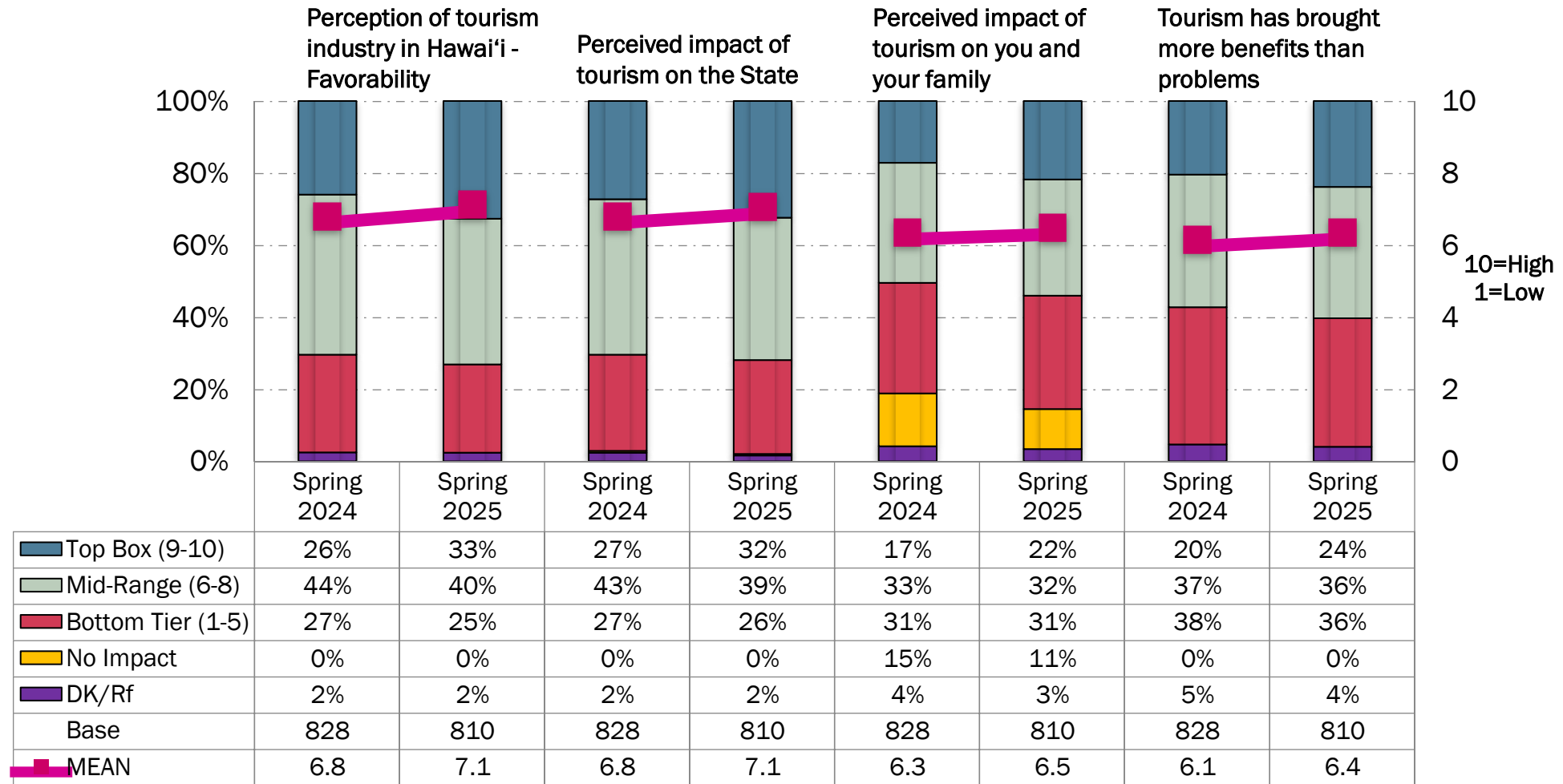
*Red font indicates questions where higher ratings are worse for Tourism sentiment.

O‘ahu sentiment is recovering but remains fragile – progress hinges on wins in managing the industry, resident attitudes on having an authentic community voice, and cost-of-living sensitivities.

- 2 **Community trends:** Sentiment is split: Urban Honolulu, ‘Ewa/Leeward, and Central O‘ahu have the strongest belief that tourism is “worth the issues,” see more household benefit, and show rising confidence the industry is managed. By contrast, the Wai‘anae Coast and North Shore remain the most skeptical.
- 3 **Invest in Industries other than Tourism:** Support for diversification in other industries was lowest on O‘ahu at 59 percent. This lower level of support was particularly pronounced in Urban Honolulu and ‘Ewa/Leeward.
- 4 **Concern that the Slow Recovery is impacting the State** was highest in ‘Ewa/Leeward and Urban Honolulu while those on the North Shore and Wai‘anae coast are relatively neutral and were less concerned than other areas.
- 5 **Slow Recovery Impacting you and your family:** Concerns of a slow recovery on you and your family align with those of the State although to a lower extent. While most communities are nearly neutral on this topic, those in Urban Honolulu and ‘Ewa/Leeward report more concern compared to other communities.

	Honolulu	‘Ewa Leeward	Wai‘anae	Windward	North Shore	Central
Other Than Tourism Should Hawai‘i Invest in Other Industries (%Yes)	57%	56%	65%	65%	64%	60%
Slow Recovery Impacts State as a Whole	6.7	6.9	5.4	6.4	5.2	6.6
Slow Recovery Impacts You and Your Family	5.8	5.7	4.9	5.2	4.9	5.1

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.

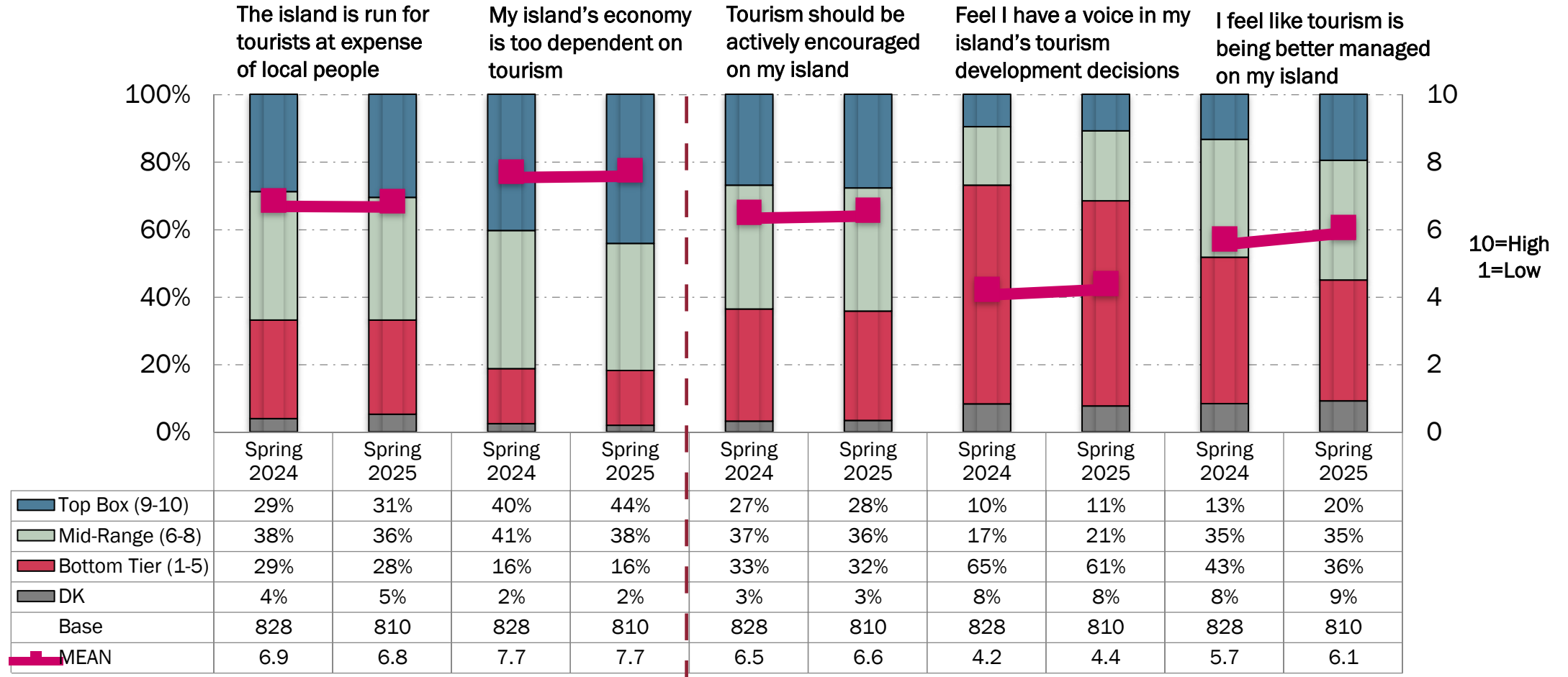
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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

O'ahu – Key Island-Specific Resident Sentiment Indicators

Negative Impacts

Tourism Management



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

Key Recommendations and Takeaways – Maui County

1 **After peaking in 2022, sentiment among Maui County residents rose again this year.** In 2025, Maui County sentiment bounced back. More residents now say tourism’s benefits outweigh its problems, feel greater household gains, and notice modest management improvements. Even so, many still feel their island caters primarily to visitors and relies too heavily on tourism, underscoring ongoing worries about balance and diversification.

Mean Score	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Tourism has brought more benefits than problems	6.11	5.92	5.72	6.10
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.67	6.26	6.28	6.67
Perceived impact of tourism on you and your family	6.40	6.50	6.17	6.57
Tourism is being better managed on my island	5.29	5.23	5.17	5.60
My island is run for tourists at expense of local people	7.11	7.19	7.62	7.03 ↓
My Island’s economy is too dependent on tourism	7.68	7.84	8.09	7.89

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

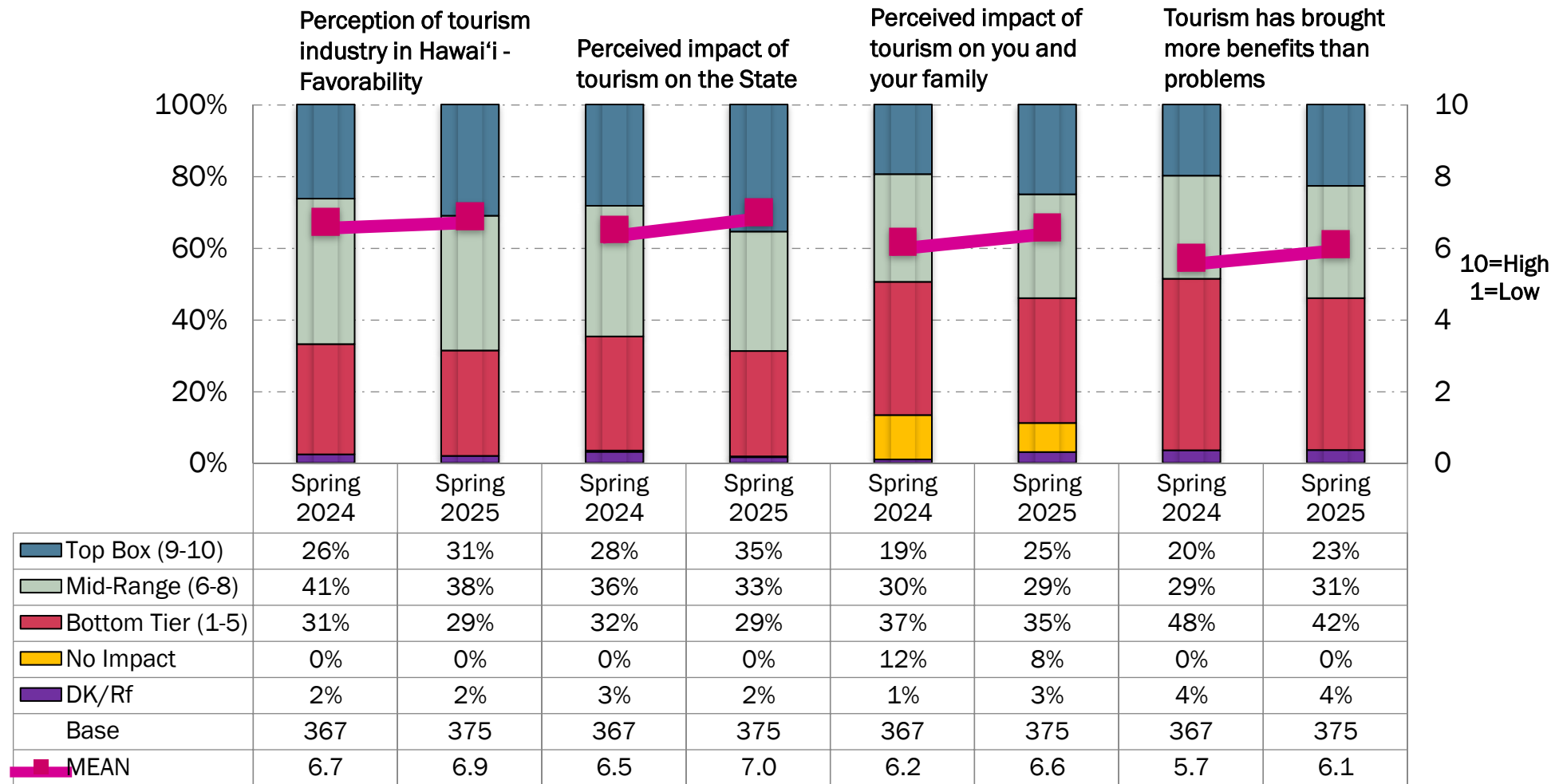
2 **Community trends:** West Maui is still the County’s most upbeat area, where residents still view tourism as a net plus for their families; however, those ratings slipped this year. Central and East Maui show rising frustration with the industry’s problems, while those on Moloka’i continue to view that their island is run for tourists. On Lāna’i, confidence in tourism management remains fairly strong, but general goodwill toward the industry is starting to wane.

3 **Agreement that the Slow Recovery is impacting the State:** Maui County, along with Honolulu residents, feel the slow visitor-market recovery is a real headwind - especially for the broader State economy.

4 **Slow Recovery Impacting you and your family:** While residents of Maui are only mildly worried about how a sluggish tourism rebound might affect their own households, those on Lāna’i stand out: residents there express a markedly higher level of concern about any downturn in the industry.

	Maui County	Island of Maui	Moloka’i	Lāna’i
Other Than Tourism Should Hawai’i Invest in Other Industries (%Yes)	61%	60%	74%	63%
Slow Recovery Impacts State as a Whole	6.5	6.4	6.3	8.5
Slow Recovery Impacts You and your Family	5.5	5.5	4.4	8.2

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.

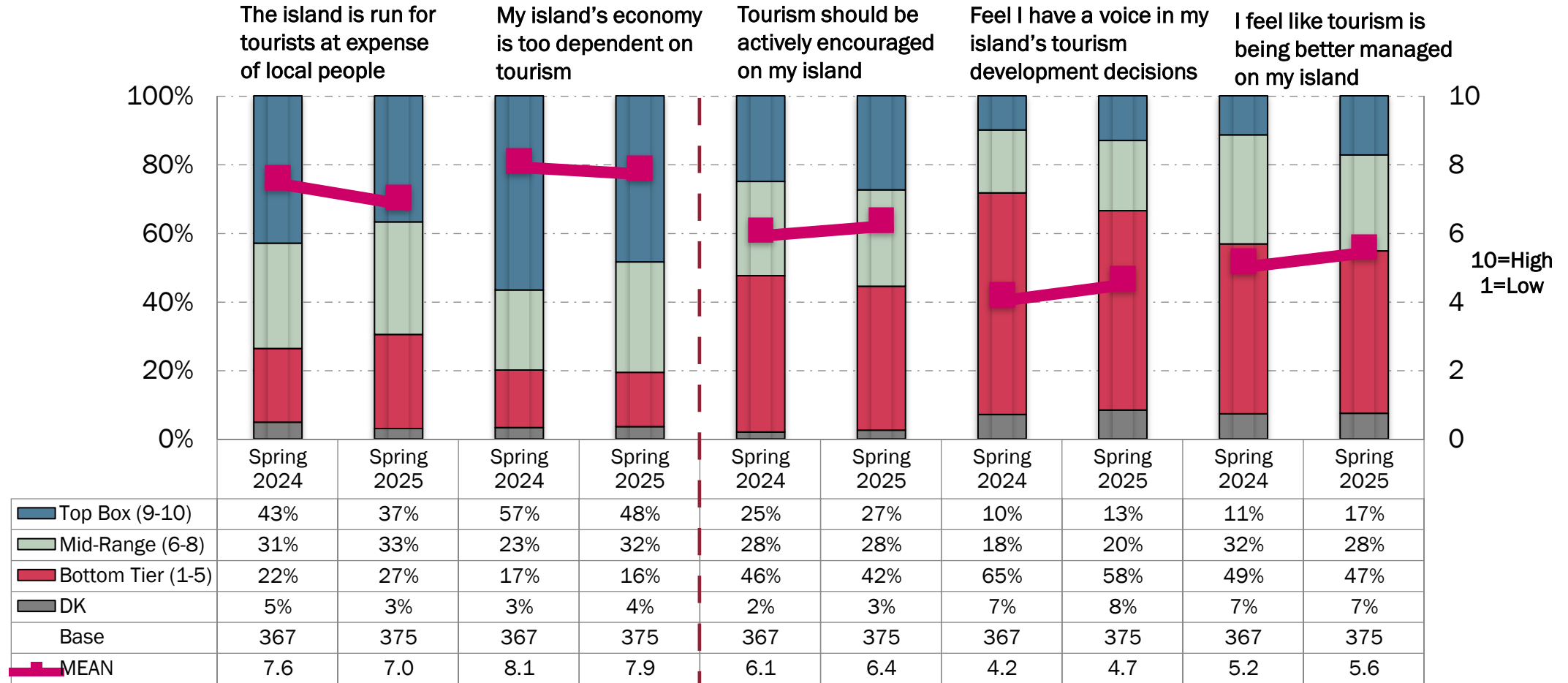
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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

Negative Impacts

Tourism Management



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

Key Recommendations and Takeaways – Hawai‘i Island

- 1 **Resident sentiment trends dipped in 2025:** After climbing in 2024, Hawai‘i Island’s positive sentiment has leveled off: Residents still see tourism’s benefits and personal impact favorably; however, scores slipped this year.

Key Resident Sentiment Tracking Statements (Hawai‘i Island)

Mean Score	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Tourism has brought more benefits than problems	5.84	5.67	5.94	5.73
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.72	6.76	6.67	6.63
Perceived impact of tourism on you and your family	6.34	6.13	6.30	6.23
Tourism is being better managed on my island	5.37	5.23	5.61	5.58
My island is run for tourists at expense of local people	6.62	6.40	6.54	6.40

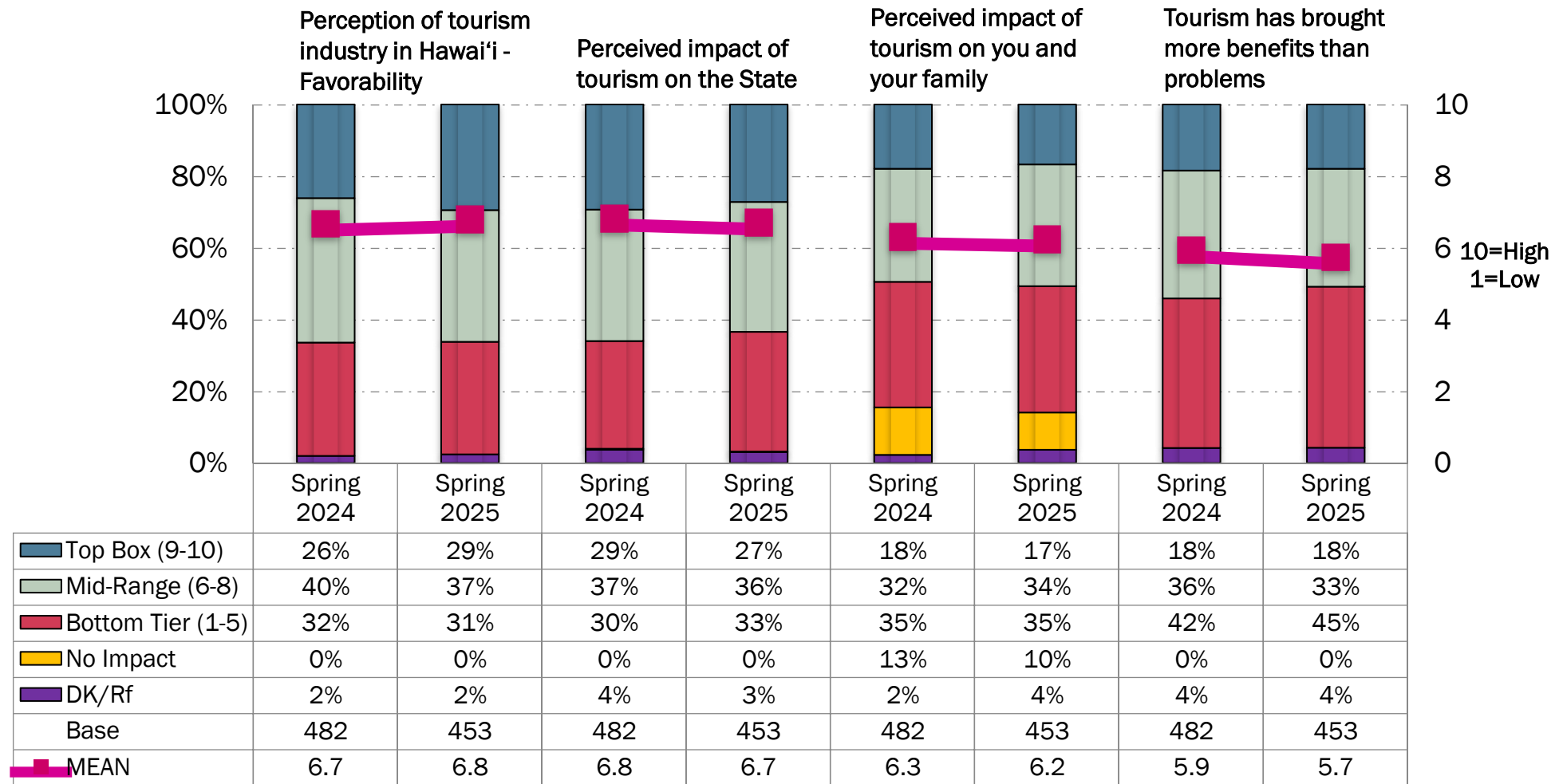
*Red font indicates questions where higher ratings are worse for Tourism sentiment.

Regarding other KPIs, views on the industry being managed held steady, while the sense that the island is run mainly for tourists eased back to 2023 levels, hinting at slightly less tension over the industry’s problems. This suggests that while the county is largely insulated from many of tourism’s problems, it is also missing out on its advantages.

- 2 **Community Differences:** Hawai‘i Island shows a clear divide: West Hawai‘i reports the greatest upsides - from job creation to household benefit - but also the strongest sense that the island is “run for tourists,” and the greatest worry about a prolonged visitor slowdown. East Hawai‘i residents, whose economy is more diversified, are less bullish on tourism’s personal value and feel less exposed to a sluggish recovery.
- 3 **Invest in Industries other than Tourism:** Hawai‘i Island residents are signaling that diversification is not merely desirable, it has become an expectation (60%+).
- 4 **Agreement that the Slow Recovery is impacting the State:** Hawai‘i Island residents are concerned with the sluggish recovery and its impact on the State. However, this was muted compared to Maui or O‘ahu residents.
- 5 **Slow Recovery Impacting you and your family:** While Hawai‘i Island residents do see the visitor slowdown as a headwind for the State, communities here are less likely to feel the impacts on their family compared to the State overall.

	West Hawai‘i	East Hawai‘i
Other Than Tourism Should Hawai‘i Invest in Other Industries (%Yes)	63%	65%
Slow Recovery Impacts State as a Whole	6.0	5.9
Slow Recovery Impacts You and your Family	5.0	5.0

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.

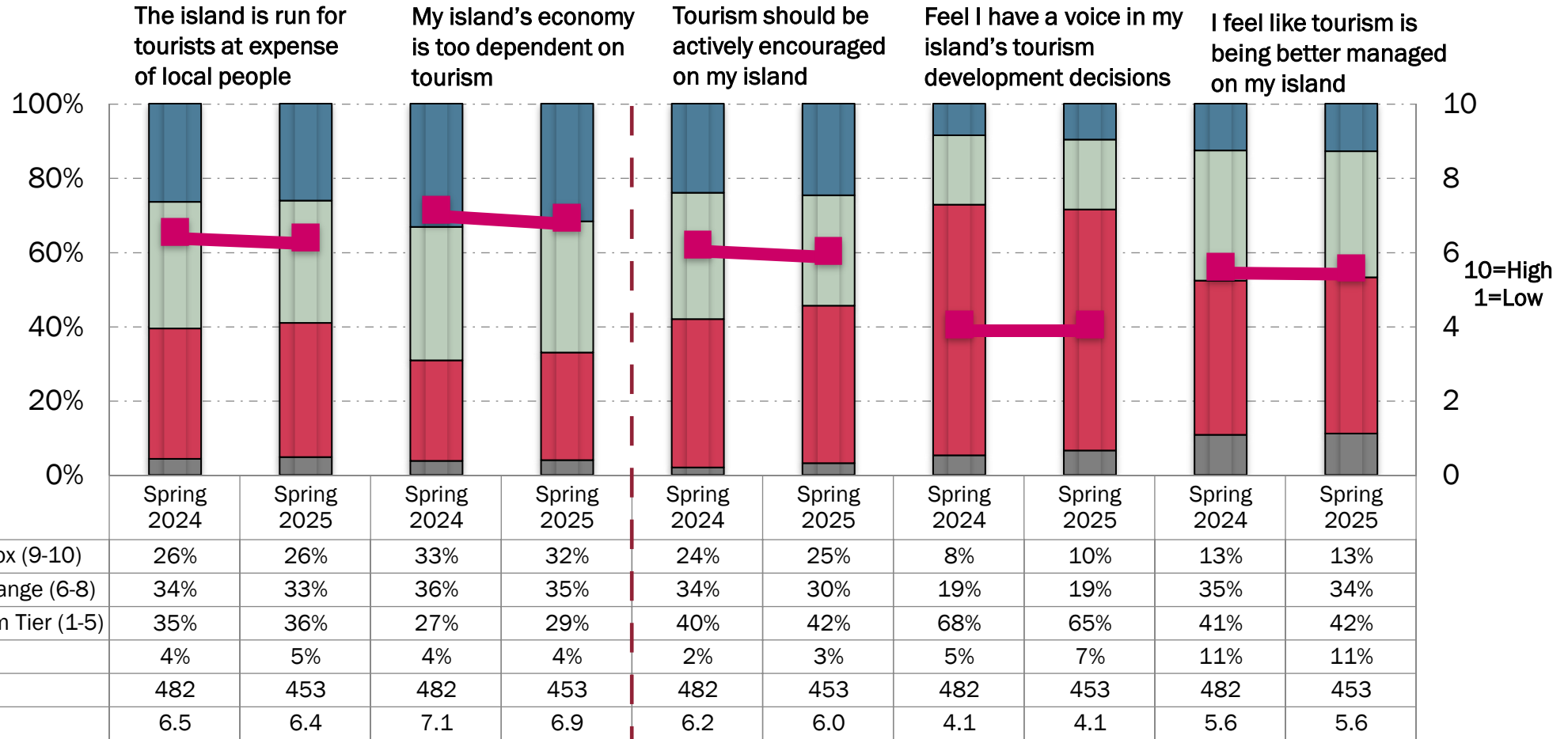
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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

Negative Impacts

Tourism Management



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

Key Recommendations and Takeaways – Kaua‘i

- 1 **Kaua‘i saw some slippage in 2025 in key resident sentiment areas:** The county’s sentiment gains peaked last year and are now settling: Residents still believe tourism’s benefits outweigh its problems and say it is “worth the issues,” but both scores slipped slightly in 2025. Perceived household benefit and confidence in management show the same pattern, well above 2022 levels yet easing from their 2024 highs, which suggests early enthusiasm is fading in these key areas.

Key Resident Sentiment Tracking Statements (Kaua‘i)

Mean Score	Fall 2022	Spring 2023	Spring 2024	Spring 2025
Tourism has brought more benefits than problems	5.72	5.81	6.20	6.06
Tourism is worth the issues with \$2 billion in taxes for schools, hospitals, etc.	6.75	6.65	6.71	6.68
Perceived impact of tourism on you and your family	6.14	6.36	6.61	6.50
Tourism is being better managed on my island	5.04	5.41	5.77	5.67
My island is run for tourists at expense of local people	7.15	7.14	7.55	7.13

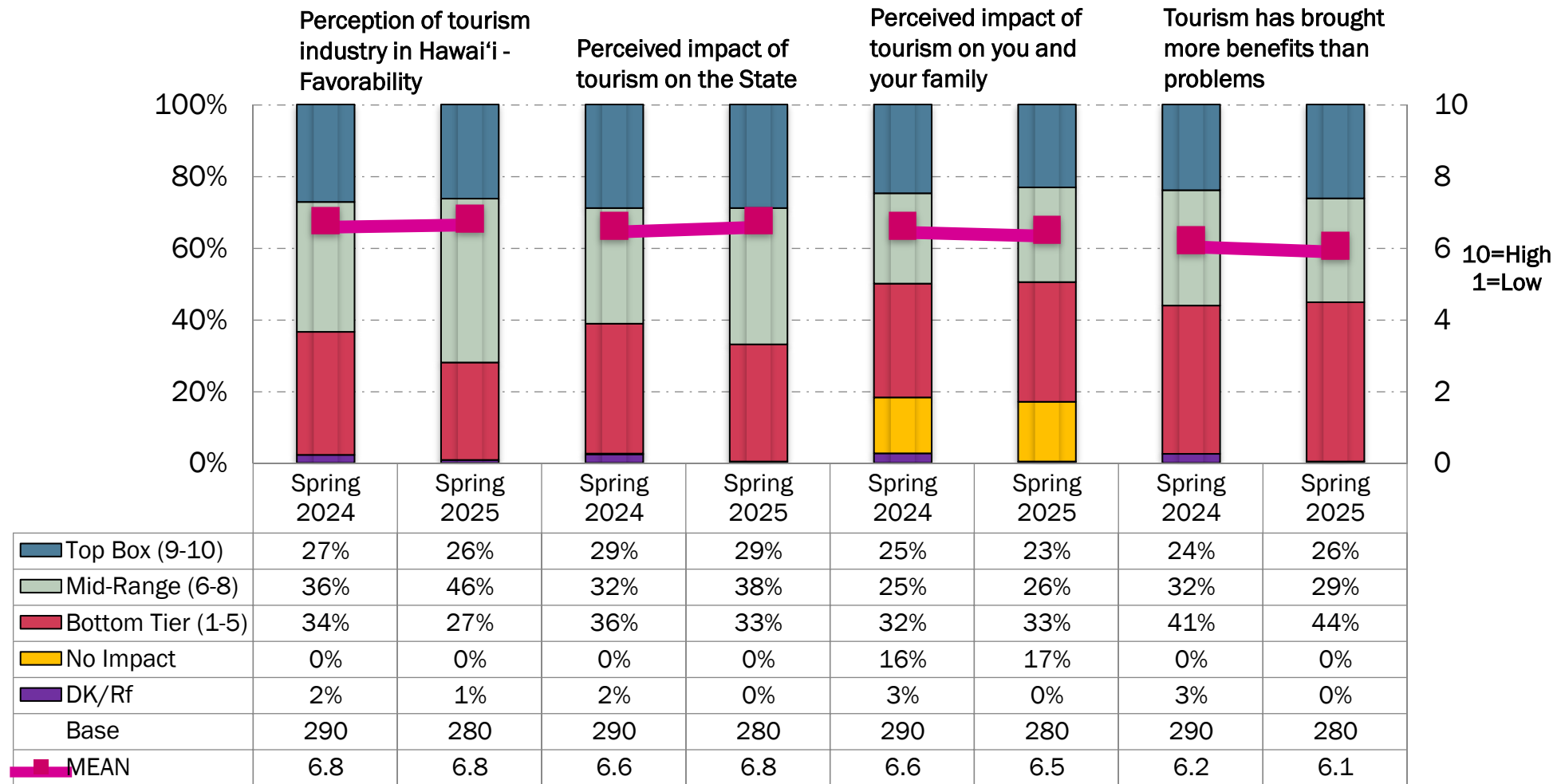
*Red font indicates questions where higher ratings are worse for Tourism sentiment.

Encouragingly, the feeling that the island is run for tourists has retreated to its 2022 level, hinting that recent efforts are starting to ease tourism’s concerns even as overall sentiment plateaus.

- 2 **Resident sentiment is similar across Kaua‘i communities:** There are no significant differences between key 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 **Invest in Industries other than Tourism:** South/West Kaua‘i residents are among the strongest advocates in the state for diversifying Hawai‘i’s economy beyond tourism.
- 4 **Agreement that the Slow Recovery is impacting the State:** Concern is remarkably uniform: residents on both North/East and South/West Kaua‘i report similar sentiment on this topic, signaling shared awareness that a sluggish visitor rebound could strain statewide revenues.
- 5 **Slow Recovery Impacting you and your family:** The gap between state-level concern and household impact is clear: Residents rate the threat to their own finances lower than the threat to Hawai‘i overall, with South/West Kaua‘i feeling slightly more vulnerable than the North/East.

	North/East Kaua‘i	South/West Kaua‘i
Other Than Tourism Should Hawai‘i Invest in Other Industries (%Yes)	58%	65%
Slow Recovery Impacts State as a Whole	6.3	6.3
Slow Recovery Impacts You and your Family	5.1	5.4

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.

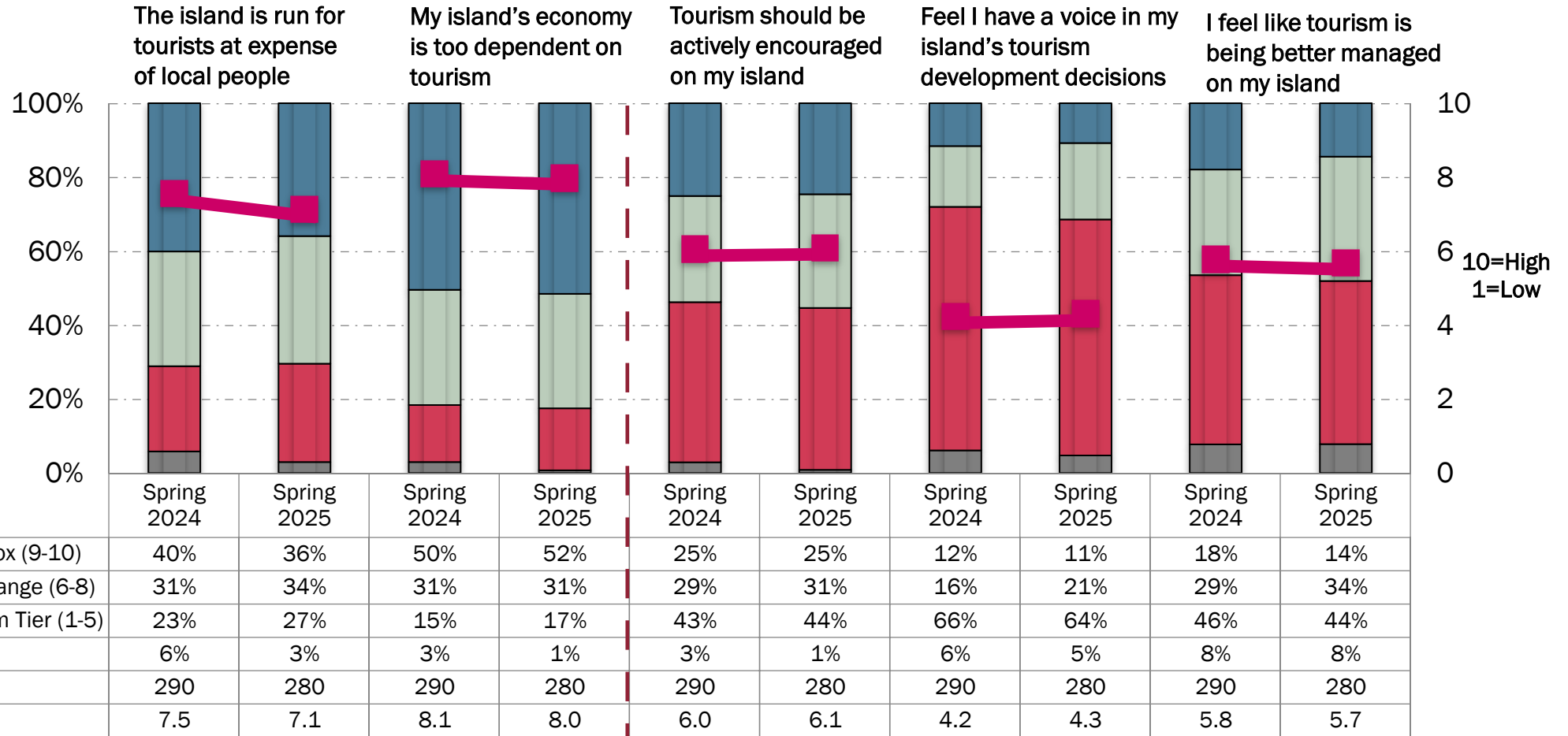
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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

Kaua'i – Key Island-Specific Resident Sentiment Indicators

Negative Impacts

Tourism Management

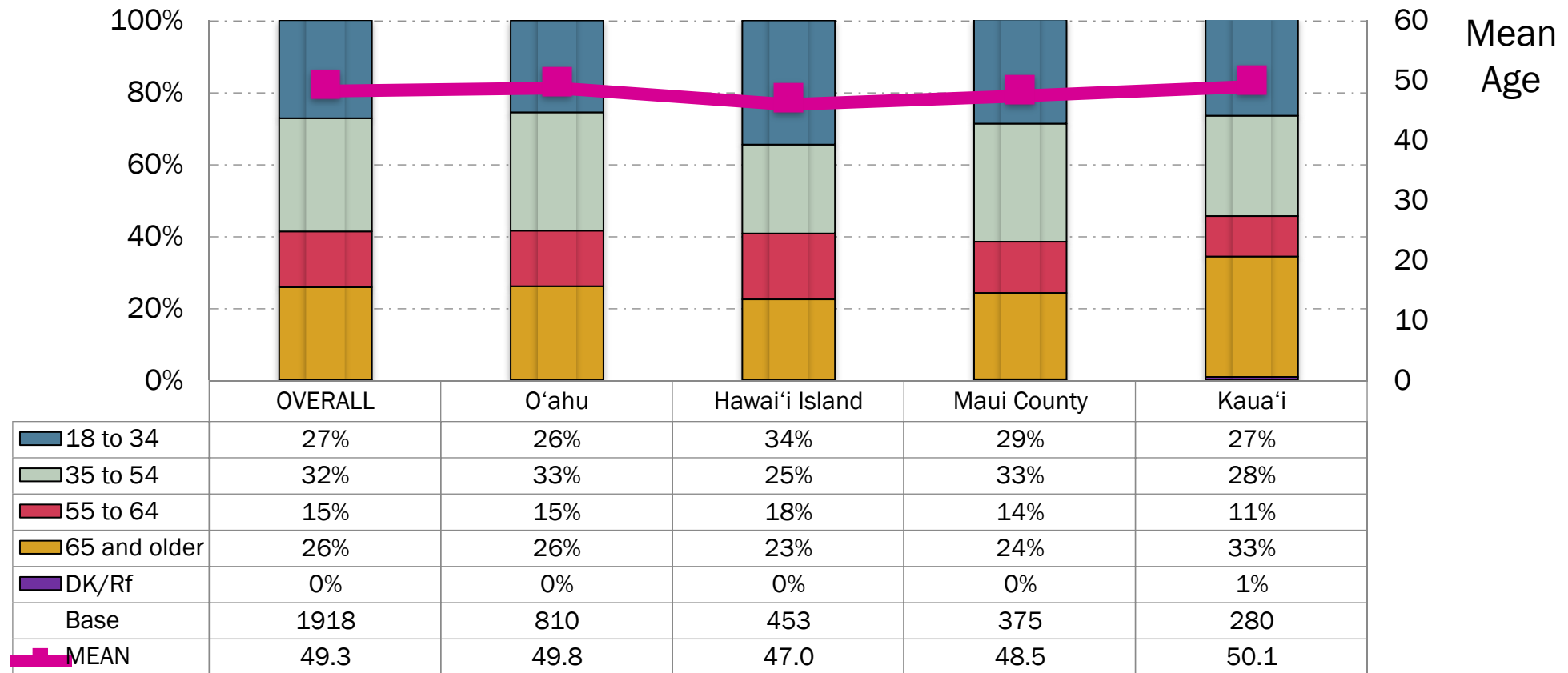


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Appendix B: Respondent Profile

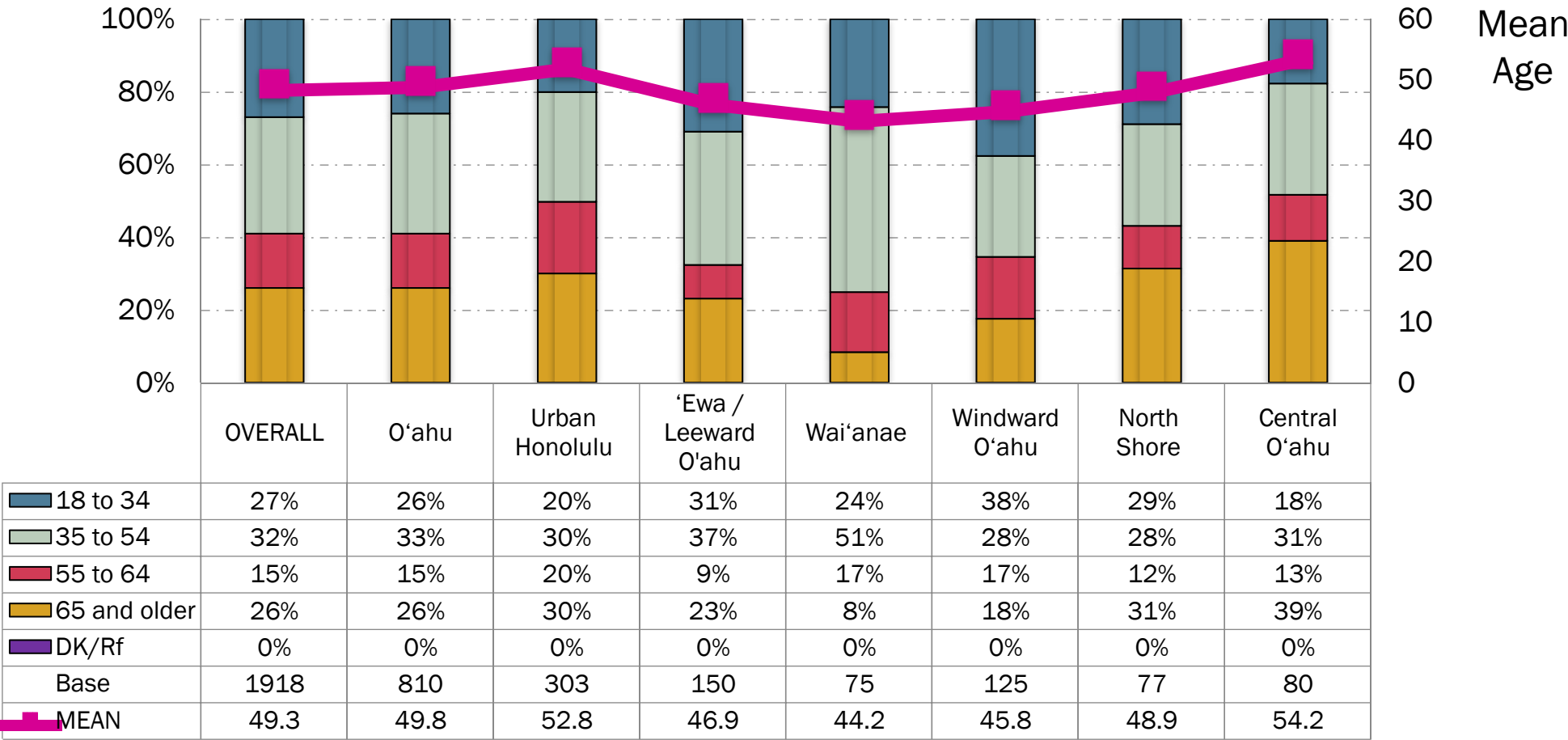


Respondent Age



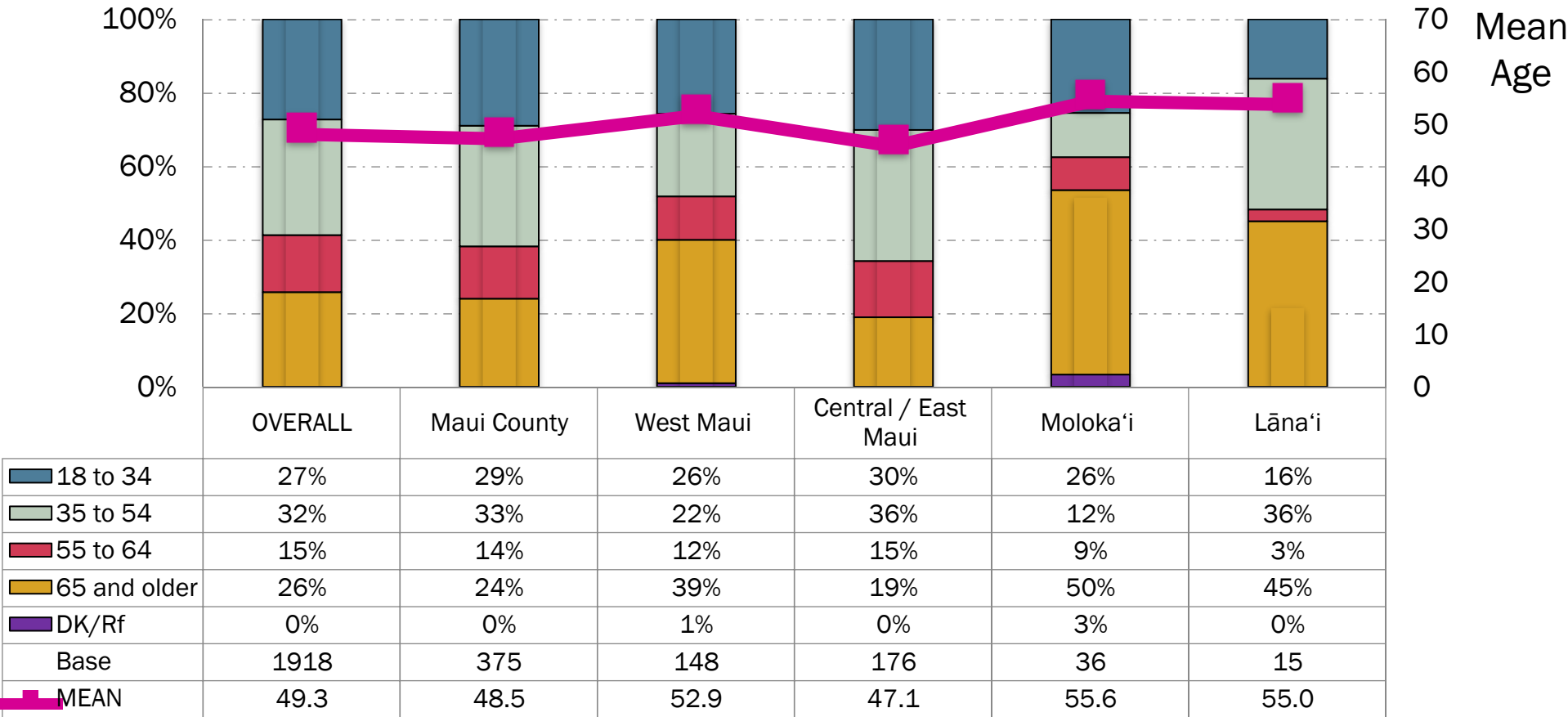
D1: What was your age on your last birthday?

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



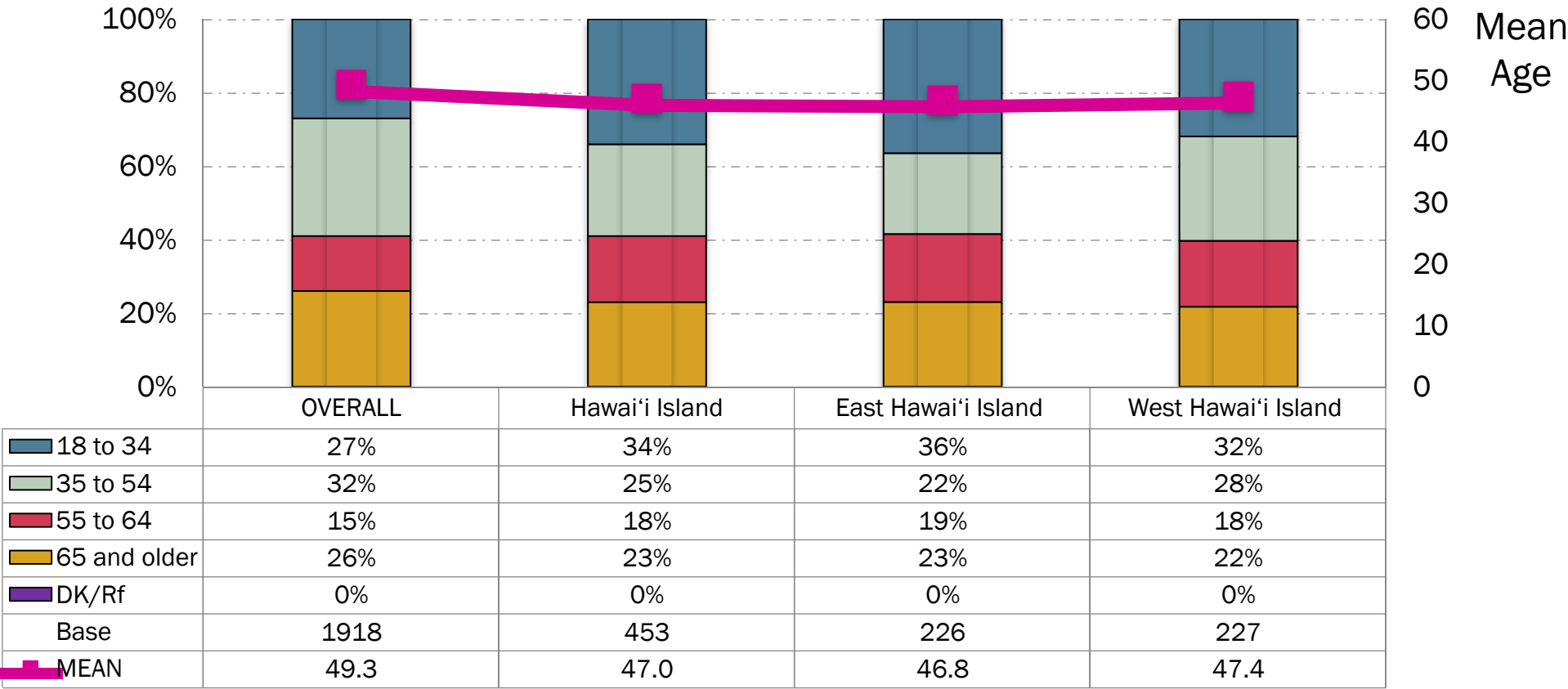
D1: What was your age on your last birthday?

Respondent Age (*By Area - Maui County*)



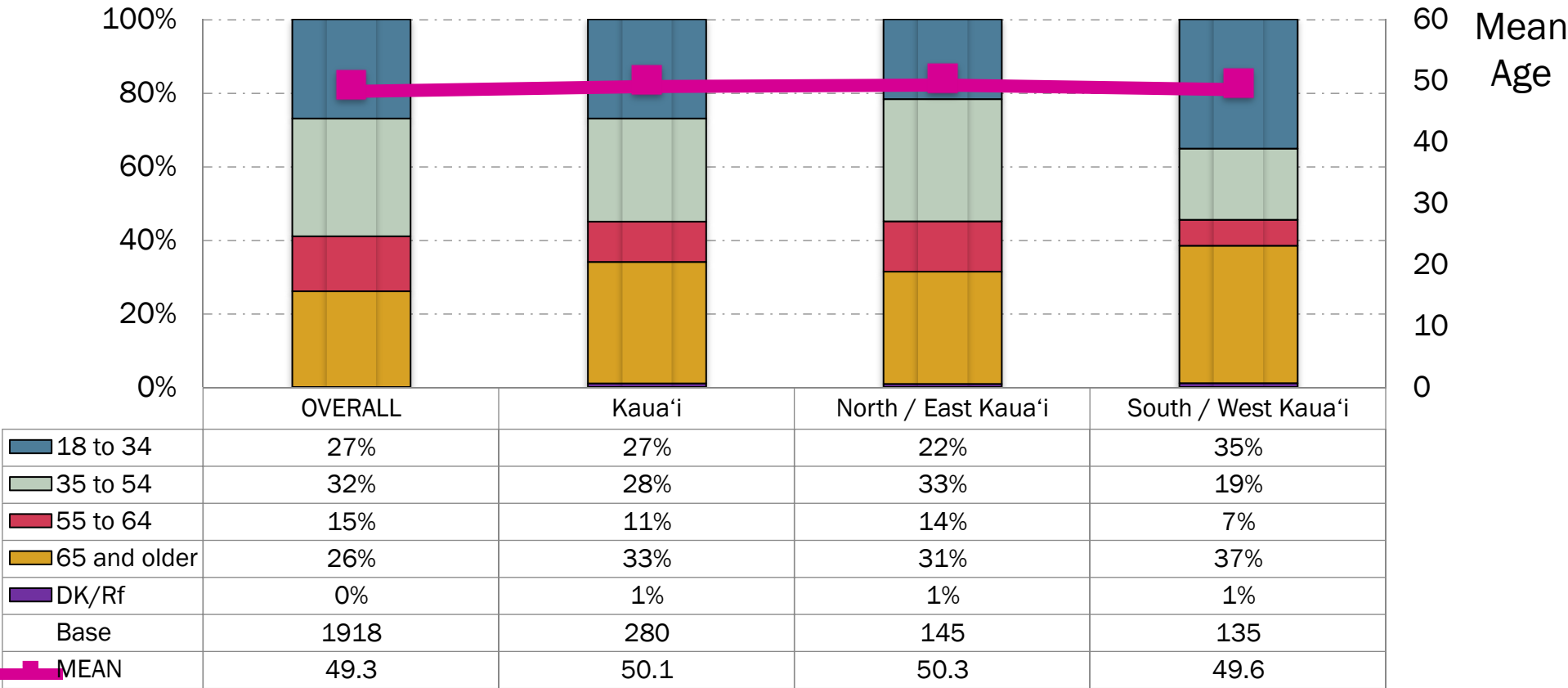
D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

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



D1: What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	20%	16%	31%	29%	27%
Japanese	18%	23%	9%	8%	10%
Hawaiian	22%	21%	26%	27%	24%
Filipino	10%	9%	9%	15%	17%
Other	30%	32%	26%	22%	23%

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%	16%	15%	17%	7%	14%	23%	19%
Japanese	18%	23%	27%	25%	1%	15%	2%	31%
Hawaiian	22%	21%	12%	17%	56%	34%	52%	16%
Filipino	10%	9%	6%	17%	8%	6%	5%	5%
Other	30%	32%	40%	25%	29%	30%	19%	29%

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%	31%	25%	38%
Japanese	18%	9%	12%	4%
Hawaiian	22%	26%	26%	26%
Filipino	10%	9%	10%	8%
Other	30%	26%	27%	24%

D2: What is your ethnic background?

Respondent Ethnicity (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
Caucasian	20%	29%	39%	28%	28%	7%
Japanese	18%	8%	9%	7%	5%	8%
Hawaiian	22%	27%	17%	28%	47%	25%
Filipino	10%	15%	16%	13%	6%	60%
Other	30%	22%	19%	23%	15%	0%

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%	27%	30%	22%
Japanese	18%	10%	12%	7%
Hawaiian	22%	24%	20%	29%
Filipino	10%	17%	13%	24%
Other	30%	23%	25%	19%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	47%	46%	44%	53%	46%
3-4	33%	35%	33%	26%	32%
5-6	11%	11%	12%	10%	12%
7+	4%	4%	5%	5%	7%
REFUSED	4%	4%	6%	6%	3%
MEAN	2.9	2.9	2.9	3.0	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	47%	46%	58%	36%	34%	30%	37%	52%
3-4	33%	35%	30%	39%	25%	47%	30%	32%
5-6	11%	11%	7%	15%	26%	12%	13%	8%
7+	4%	4%	1%	4%	6%	6%	19%	5%
REFUSED	4%	4%	3%	5%	9%	5%	0%	3%
MEAN	2.9	2.9	2.4	3.2	3.8	3.4	4.2	2.6

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

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
1-2	47%	44%	45%	43%
3-4	33%	33%	33%	31%
5-6	11%	12%	13%	11%
7+	4%	5%	2%	9%
REFUSED	4%	6%	7%	5%
MEAN	2.9	2.9	2.9	3.0

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

Household Size (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
1-2	47%	53%	54%	53%	49%	60%
3-4	33%	26%	25%	26%	22%	19%
5-6	11%	10%	13%	11%	0%	11%
7+	4%	5%	1%	4%	16%	10%
REFUSED	4%	6%	8%	6%	13%	0%
MEAN	2.9	3.0	2.7	2.9	4.9	2.8

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

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
1-2	47%	46%	49%	43%
3-4	33%	32%	32%	32%
5-6	11%	12%	10%	14%
7+	4%	7%	5%	9%
REFUSED	4%	3%	5%	2%
MEAN	2.9	3.2	3.0	3.4

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

Marital Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Single, never married	30%	29%	32%	32%	29%
Married	46%	48%	40%	42%	46%
Divorced, separated, widowed	15%	15%	16%	13%	18%
Domestic Partnership	6%	6%	7%	9%	4%
Other	1%	1%	1%	1%	0%
Refused	3%	2%	4%	3%	2%

D4: What is your marital status?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
Single, never married	30%	29%	28%	31%	27%	37%	30%	18%
Married	46%	48%	46%	48%	40%	54%	44%	54%
Divorced, separated, widowed	15%	15%	20%	11%	14%	7%	22%	9%
Domestic Partnership	6%	6%	6%	6%	12%	1%	5%	9%
Other	1%	1%	0%	2%	3%	0%	0%	0%
Refused	3%	2%	1%	2%	6%	1%	0%	10%

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	30%	32%	37%	25%
Married	46%	40%	34%	47%
Divorced, separated, widowed	15%	16%	18%	15%
Domestic Partnership	6%	7%	6%	8%
Other	1%	1%	1%	0%
Refused	3%	4%	3%	5%

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	30%	32%	33%	32%	20%	36%
Married	46%	42%	48%	42%	34%	41%
Divorced, separated, widowed	15%	13%	8%	13%	38%	24%
Domestic Partnership	6%	9%	7%	10%	2%	0%
Other	1%	1%	1%	1%	0%	0%
Refused	3%	3%	4%	3%	6%	0%

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	30%	29%	33%	24%
Married	46%	46%	42%	53%
Divorced, separated, widowed	15%	18%	17%	19%
Domestic Partnership	6%	4%	5%	3%
Other	1%	0%	0%	0%
Refused	3%	2%	3%	2%

D4: What is your marital status?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	19%	16%	31%	25%	20%
Bus/Trade School/ Some college	28%	27%	31%	27%	37%
College Graduate	51%	56%	36%	47%	41%
DK/Refused	1%	1%	2%	1%	1%

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	19%	16%	9%	20%	35%	18%	21%	20%
Bus/Trade School/ Some college	28%	27%	21%	26%	38%	35%	42%	31%
College Graduate	51%	56%	69%	53%	21%	45%	37%	49%
DK/Refused	1%	1%	1%	1%	6%	2%	0%	0%

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	19%	31%	30%	31%
Bus/Trade School/ Some college	28%	31%	34%	26%
College Graduate	51%	36%	33%	41%
DK/Refused	1%	2%	2%	2%

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

Education (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
H.S. or less	19%	25%	20%	25%	34%	39%
Bus/ Trade School/ Some college	28%	27%	35%	26%	24%	25%
College Graduate	51%	47%	42%	49%	35%	36%
DK/Refused	1%	1%	3%	1%	6%	0%

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

Education (*By Area - Kauaʻi*)

	OVERALL	Kauaʻi	North / East Kauaʻi	South / West Kauaʻi
H.S. or less	19%	20%	20%	22%
Bus/ Trade School/ Some college	28%	37%	41%	32%
College Graduate	51%	41%	39%	45%
DK/Refused	1%	1%	1%	2%

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

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Currently Employed	59%	59%	55%	60%	62%
Not Employed	41%	41%	45%	40%	38%

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	59%	59%	61%	58%	53%	66%	59%	52%
Not Employed	41%	41%	39%	42%	47%	34%	41%	48%

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	59%	55%	55%	55%
Not Employed	41%	45%	45%	45%

D6: Are you currently employed?

Employment Status (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
Currently Employed	59%	60%	47%	62%	51%	65%
Not Employed	41%	40%	53%	38%	49%	35%

D6: Are you currently employed?

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

	OVERALL	Kaua'i	North / East Kaua'i	South / West Kaua'i
Currently Employed	59%	62%	65%	55%
Not Employed	41%	38%	35%	45%

D6: Are you currently employed?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	49%	51%	48%	46%	39%
FEMALE	50%	48%	50%	52%	61%
OTHER	1%	0%	3%	2%	0%

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%	57%	52%	26%	55%	25%	45%
FEMALE	50%	48%	42%	48%	70%	45%	75%	55%
OTHER	1%	0%	1%	0%	1%	0%	0%	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%	48%	51%	42%
FEMALE	50%	50%	46%	54%
OTHER	1%	3%	0%	0%

D7: What is your gender?

Gender (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
MALE	49%	46%	46%	46%	43%	49%
FEMALE	50%	52%	53%	52%	54%	51%
OTHER	1%	2%	0%	0%	0%	0%

D7: What is your gender?

Gender (*By Area - Kauaʻi*)

	OVERALL	Kauaʻi	North / East Kauaʻi	South / West Kauaʻi
MALE	49%	39%	34%	46%
FEMALE	50%	61%	66%	53%
OTHER	1%	0%	0%	0%

D7: What is your gender?

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	9%	10%	5%	7%	9%
Sales	7%	6%	8%	7%	6%
Management	6%	6%	4%	7%	7%
Administrative/clerical	6%	6%	5%	5%	6%
Self-employed	5%	4%	5%	5%	5%
Blue Collar (laborer/farmer/ construction, etc.)	4%	3%	6%	5%	7%
White Collar	4%	4%	3%	3%	4%
Chairman/President/CEO/ Executive	4%	4%	3%	4%	1%
Technical	3%	4%	2%	2%	4%
Service for hotel/restaurant, etc.	3%	2%	4%	4%	7%
Partner/owner/proprietor	3%	2%	3%	4%	1%
Military	1%	2%	0%	0%	0%
Education/Teacher	1%	2%	2%	0%	1%
Homemaker/Caregiver	1%	1%	2%	0%	1%
Student	0%	0%	0%	1%	0%
Other	3%	3%	4%	3%	2%
Not employed/Retired	41%	41%	45%	40%	38%

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	9%	10%	11%	11%	7%	10%	2%	5%
Sales	7%	6%	5%	8%	4%	6%	8%	8%
Management	6%	6%	5%	6%	14%	7%	11%	6%
Administrative/clerical	6%	6%	7%	5%	2%	8%	3%	7%
Self-employed	5%	4%	5%	5%	3%	3%	7%	1%
Blue Collar (laborer/ farmer/construction, etc.)	4%	3%	2%	2%	7%	6%	6%	6%
White Collar	4%	4%	5%	4%	0%	5%	0%	1%
Chairman/President/CEO/Executive	4%	4%	6%	5%	1%	3%	0%	0%
Technical	3%	4%	4%	3%	2%	5%	1%	5%
Service for hotel/ restaurant, etc.	3%	2%	1%	0%	5%	2%	7%	2%
Partner/owner/proprietor	3%	2%	3%	1%	1%	3%	3%	0%
Military	1%	2%	1%	4%	3%	1%	0%	4%
Education/Teacher	1%	2%	1%	3%	0%	2%	4%	1%
Homemaker/Caregiver	1%	1%	1%	0%	2%	0%	0%	0%
Student	0%	0%	1%	0%	0%	0%	4%	0%
Other	3%	3%	2%	2%	2%	5%	5%	5%
Not employed/Retired	41%	41%	39%	42%	47%	34%	41%	48%

D8: What is your occupation?

257

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
Professional	9%	5%	5%	6%
Sales	7%	8%	7%	11%
Management	6%	4%	5%	3%
Administrative/clerical	6%	5%	6%	2%
Self-employed	5%	5%	4%	7%
Blue Collar (laborer/farmer/ construction, etc.)	4%	6%	7%	4%
White Collar	4%	3%	2%	4%
Chairman/President/CEO/ Executive	4%	3%	4%	1%
Technical	3%	2%	2%	2%
Service for hotel/restaurant, etc.	3%	4%	3%	5%
Partner/owner/proprietor	3%	3%	3%	4%
Military	1%	0%	0%	0%
Education/Teacher	1%	2%	2%	1%
Homemaker/Caregiver	1%	2%	2%	1%
Student	0%	0%	0%	0%
Other	3%	4%	4%	3%
Not employed/Retired	41%	45%	45%	45%

Occupation (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Moloka'i	Lāna'i
Professional	9%	7%	3%	7%	6%	4%
Sales	7%	7%	5%	8%	0%	12%
Management	6%	7%	10%	6%	9%	0%
Administrative/clerical	6%	5%	1%	6%	5%	4%
Self-employed	5%	5%	4%	6%	8%	0%
Blue Collar (laborer/farmer/ construction, etc.)	4%	5%	4%	6%	0%	0%
White Collar	4%	3%	5%	2%	6%	15%
Chairman/President/ CEO/Executive	4%	4%	4%	4%	0%	0%
Technical	3%	2%	3%	1%	6%	0%
Service for hotel/restaurant, etc.	3%	4%	4%	4%	0%	31%
Partner/owner/proprietor	3%	4%	1%	5%	0%	0%
Military	1%	0%	0%	0%	6%	0%
Education/Teacher	1%	0%	2%	0%	0%	0%
Homemaker/Caregiver	1%	0%	0%	0%	2%	0%
Student	0%	1%	0%	1%	0%	0%
Other	3%	3%	0%	4%	2%	0%
Not employed/Retired	41%	40%	53%	38%	49%	35%

Occupation (*By Area - Kauaʻi*)

	OVERALL	Kauaʻi	North / East Kauaʻi	South / West Kauaʻi
Professional	9%	9%	10%	9%
Sales	7%	6%	6%	5%
Management	6%	7%	6%	8%
Administrative/clerical	6%	6%	9%	2%
Self-employed	5%	5%	7%	2%
Blue Collar (laborer/farmer/ construction, etc.)	4%	7%	6%	9%
White Collar	4%	4%	6%	1%
Chairman/President/CEO/Executive	4%	1%	1%	1%
Technical	3%	4%	4%	2%
Service for hotel/restaurant, etc.	3%	7%	7%	8%
Partner/owner/proprietor	3%	1%	1%	2%
Military	1%	0%	0%	0%
Education/Teacher	1%	1%	0%	2%
Homemaker/Caregiver	1%	1%	1%	0%
Student	0%	0%	0%	0%
Other	3%	2%	1%	4%
Not employed/Retired	41%	38%	35%	45%

D8: What is your occupation?

260

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	13%	12%	20%	13%	11%
\$25K-\$35K	9%	8%	13%	10%	7%
\$35K-\$50K	11%	11%	14%	6%	8%
\$50K-\$75K	13%	12%	15%	18%	15%
\$75K-\$100K	16%	17%	11%	12%	14%
\$100K-\$150K	18%	19%	13%	21%	26%
\$150K-\$200K	8%	9%	5%	7%	6%
\$200K+	5%	5%	3%	4%	5%
DK/ Rf	7%	6%	7%	8%	9%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2024?
Just stop me when I come to the correct category?

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

	OVERALL	O'ahu	Urban Honolulu	'Ewa / Leeward O'ahu	Wai'anae	Windward O'ahu	North Shore	Central O'ahu
<\$25K	13%	12%	12%	11%	25%	9%	16%	5%
\$25K-\$35K	9%	8%	10%	7%	3%	9%	8%	5%
\$35K-\$50K	11%	11%	11%	10%	18%	9%	14%	17%
\$50K-\$75K	13%	12%	9%	10%	19%	17%	11%	17%
\$75K-\$100K	16%	17%	17%	25%	7%	11%	7%	18%
\$100K-\$150K	18%	19%	20%	19%	9%	23%	14%	17%
\$150K-\$200K	8%	9%	10%	8%	5%	10%	8%	11%
\$200K+	5%	5%	5%	6%	1%	5%	11%	5%
DK/ Rf	7%	6%	5%	5%	14%	8%	10%	5%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2024?
Just stop me when I come to the correct category?

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

	OVERALL	Hawai'i Island	East Hawai'i Island	West Hawai'i Island
<\$25K	13%	20%	20%	18%
\$25K-\$35K	9%	13%	15%	10%
\$35K-\$50K	11%	14%	11%	17%
\$50K-\$75K	13%	15%	19%	11%
\$75K-\$100K	16%	11%	12%	9%
\$100K-\$150K	18%	13%	11%	15%
\$150K-\$200K	8%	5%	4%	7%
\$200K+	5%	3%	1%	5%
DK/ Rf	7%	7%	6%	9%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2024?
Just stop me when I come to the correct category?

Household Income (*By Area – Maui County*)

	OVERALL	Maui County	West Maui	Central / East Maui	Molokaʻi	Lānaʻi
<\$25K	13%	13%	12%	13%	20%	16%
\$25K-\$35K	9%	10%	8%	10%	5%	14%
\$35K-\$50K	11%	6%	13%	4%	14%	14%
\$50K-\$75K	13%	18%	20%	17%	23%	42%
\$75K-\$100K	16%	12%	10%	13%	11%	4%
\$100K-\$150K	18%	21%	14%	24%	2%	0%
\$150K-\$200K	8%	7%	8%	8%	5%	0%
\$200K+	5%	4%	6%	4%	0%	4%
DK/ Rf	7%	8%	9%	7%	21%	6%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2024?
Just stop me when I come to the correct category?

Household Income (*By Area - Kauaʻi*)

	OVERALL	Kauaʻi	North / East Kauaʻi	South / West Kauaʻi
<\$25K	13%	11%	13%	9%
\$25K-\$35K	9%	7%	5%	10%
\$35K-\$50K	11%	8%	9%	6%
\$50K-\$75K	13%	15%	12%	20%
\$75K-\$100K	16%	14%	17%	10%
\$100K-\$150K	18%	26%	26%	25%
\$150K-\$200K	8%	6%	6%	7%
\$200K+	5%	5%	6%	4%
DK/ Rf	7%	9%	7%	11%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2024?
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	15%	14%	18%	14%	14%
10 to 19 years	9%	8%	14%	9%	9%
20 years or more	21%	21%	18%	23%	18%
Born in Hawai'i	54%	55%	47%	51%	57%
DK/ Rf	1%	1%	2%	2%	2%

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	15%	14%	16%	15%	11%	9%	13%	17%
10 to 19 years	9%	8%	9%	11%	2%	6%	5%	9%
20 years or more	21%	21%	25%	18%	16%	15%	25%	20%
Born in Hawai'i	54%	55%	49%	55%	65%	68%	57%	55%
DK/ Rf	1%	1%	1%	1%	6%	1%	0%	0%

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	15%	18%	17%	19%
10 to 19 years	9%	14%	11%	18%
20 years or more	21%	18%	17%	20%
Born in Hawai'i	54%	47%	53%	40%
DK/ Rf	1%	2%	2%	3%

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	15%	14%	12%	15%	13%	6%
10 to 19 years	9%	9%	10%	10%	4%	4%
20 years or more	21%	23%	29%	21%	23%	46%
Born in Hawai'i	54%	51%	49%	52%	48%	44%
DK/ Rf	1%	2%	1%	2%	13%	0%

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	15%	14%	13%	16%
10 to 19 years	9%	9%	9%	9%
20 years or more	21%	18%	19%	16%
Born in Hawai'i	54%	57%	57%	56%
DK/ Rf	1%	2%	2%	2%

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

Mahalo from the Omnitrak Group

