

Resident Sentiment Survey Spring 2022 Highlights



Prepared for the:
State Department of Business, Economic Development & Tourism: Project #5808
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Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813
Telephone: 1-808-528-4050
omnitrak@omnitrakgroup.com

What's the Big Idea?

Fall 2021 Resident Sentiment Recap



B I G I D E A

1

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

2

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

3

The Next Chapter: As awareness of tourism management efforts rises, they are gaining support and influence in improving resident sentiment.

What's the Big Idea?



B I G I D E A

1

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

2

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

3

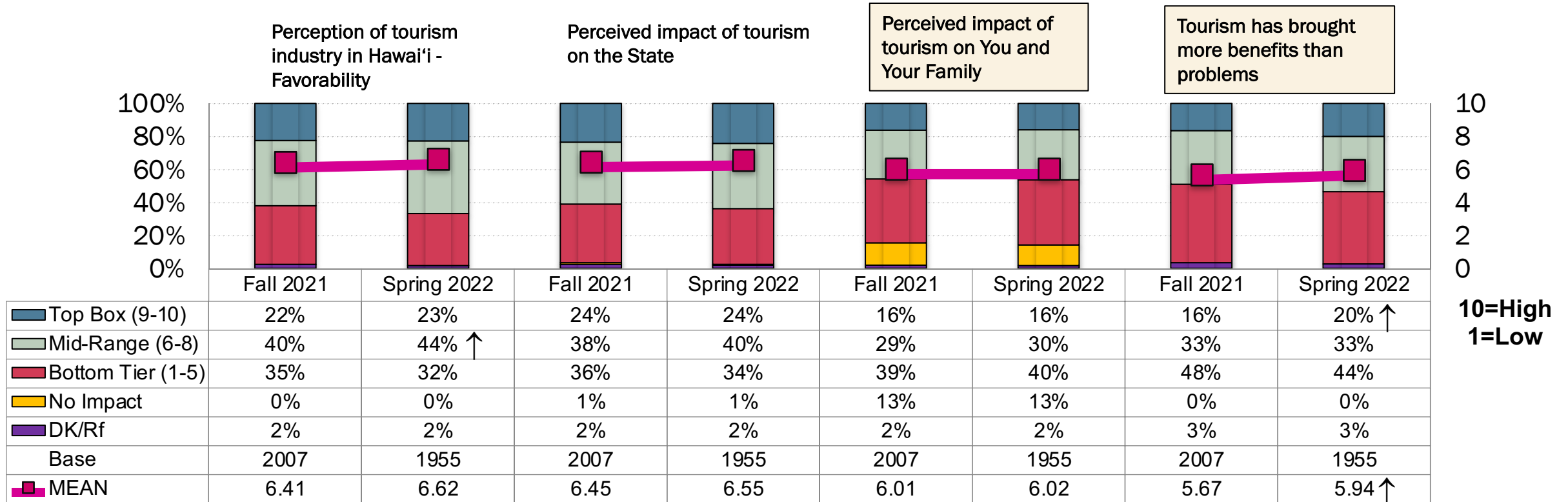
The Next Chapter: To fuel further improvement in resident sentiment, continue to implement/build awareness of tourism management efforts, along with the economic/quality of life benefits of tourism.



1

The Great Reset: Early signs of strengthening resident sentiment are appearing

High-level Resident Sentiment indicators show improvement



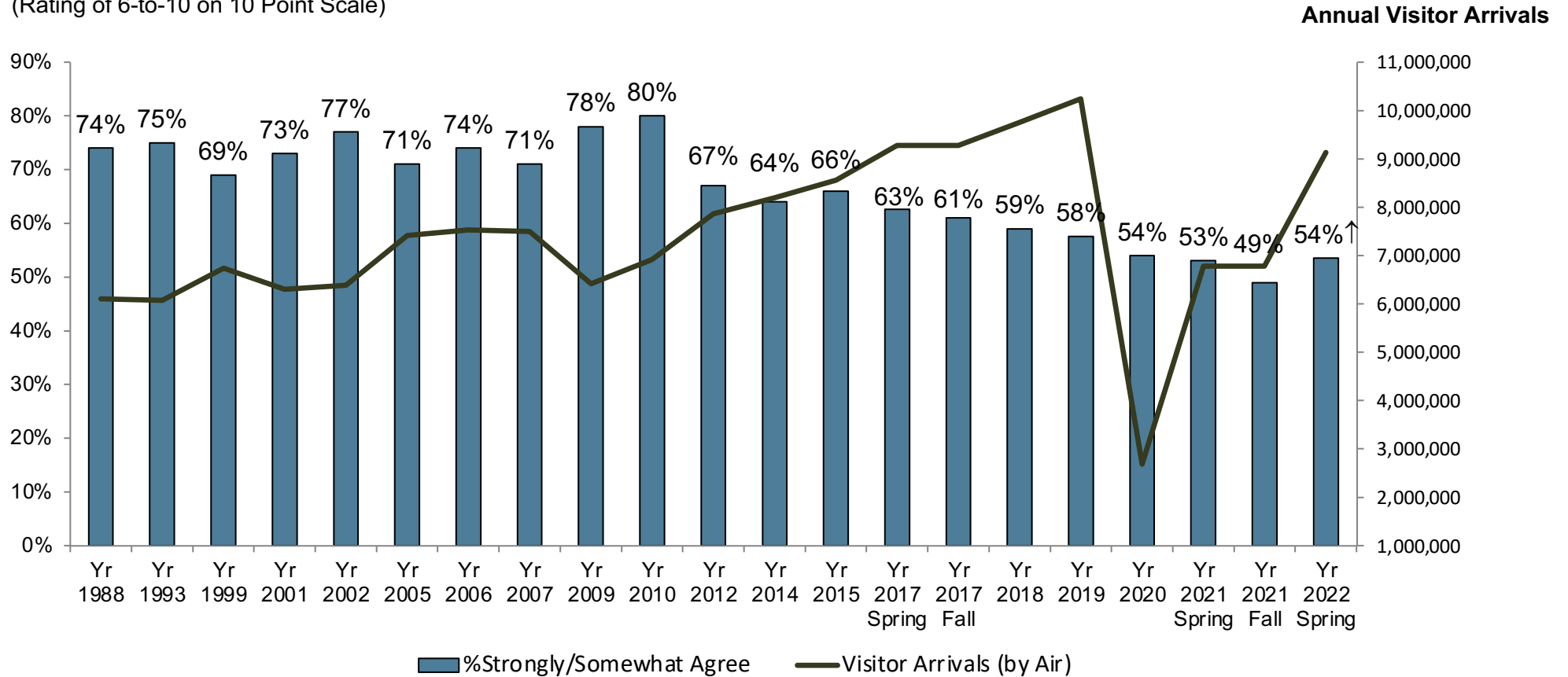
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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.

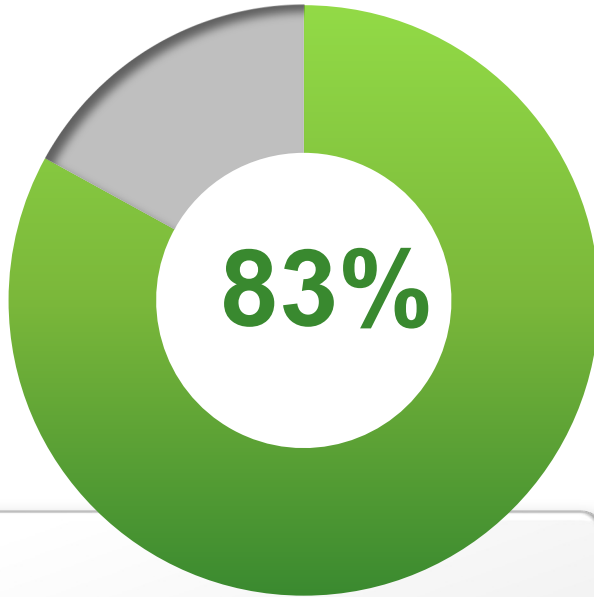
“Tourism has brought more benefits than problems” strengthens

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

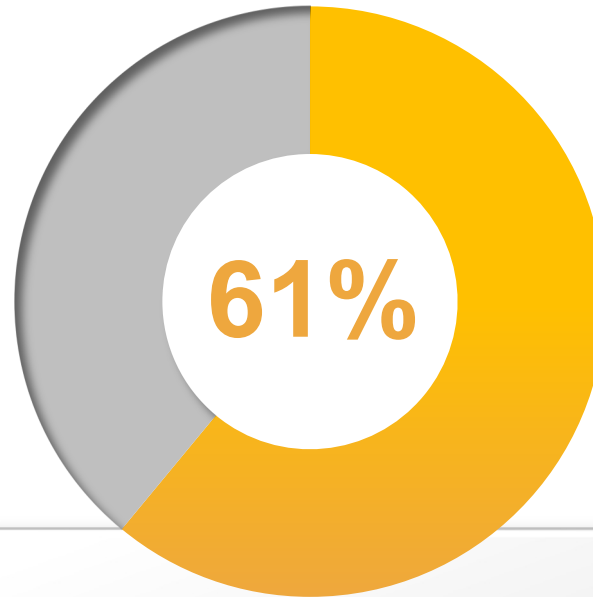


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

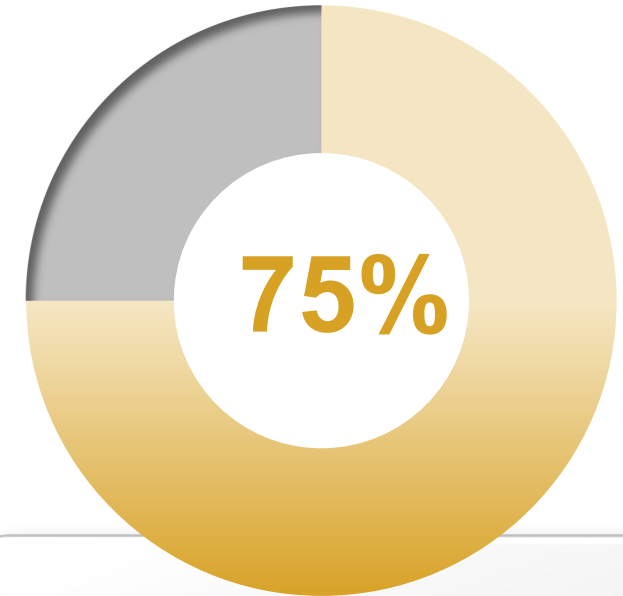
U.S. Nationwide Community Sentiment



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



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

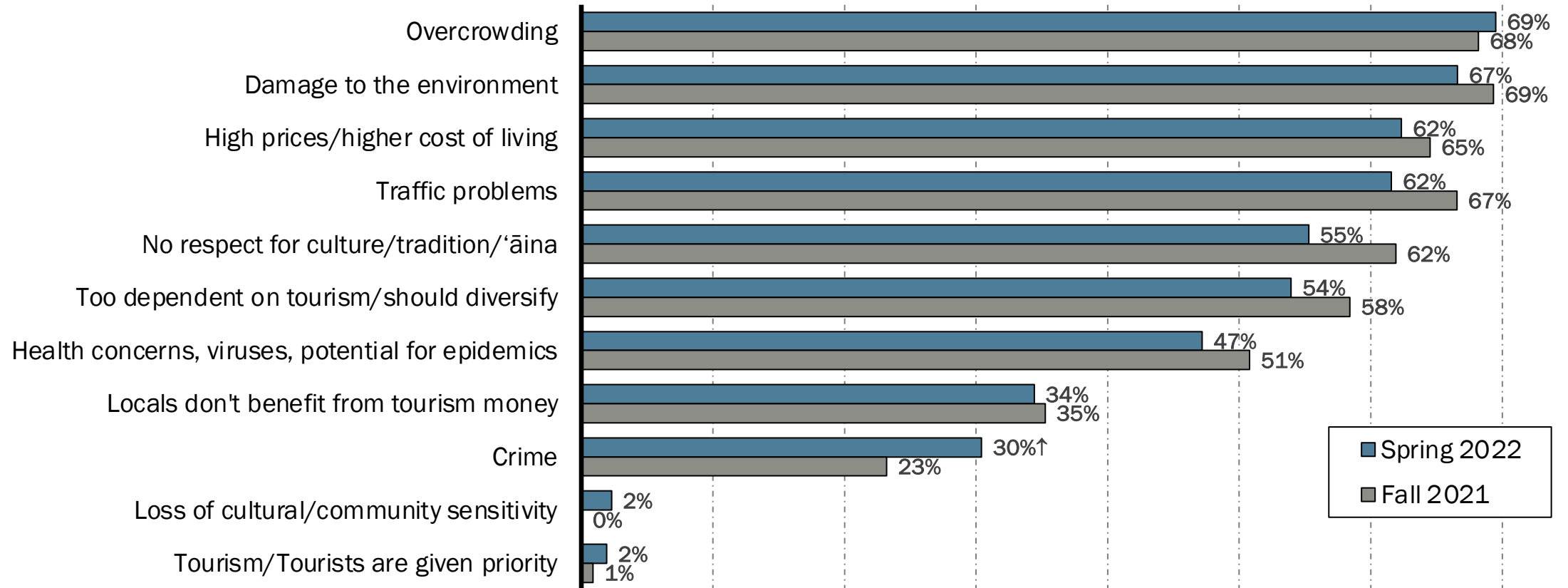


Say the benefits of tourism outweigh the negatives.

Source: Omnitrak Community Sentiment Survey of 13,143 U.S. adults (ages 18+) nationwide, Spring 2022.

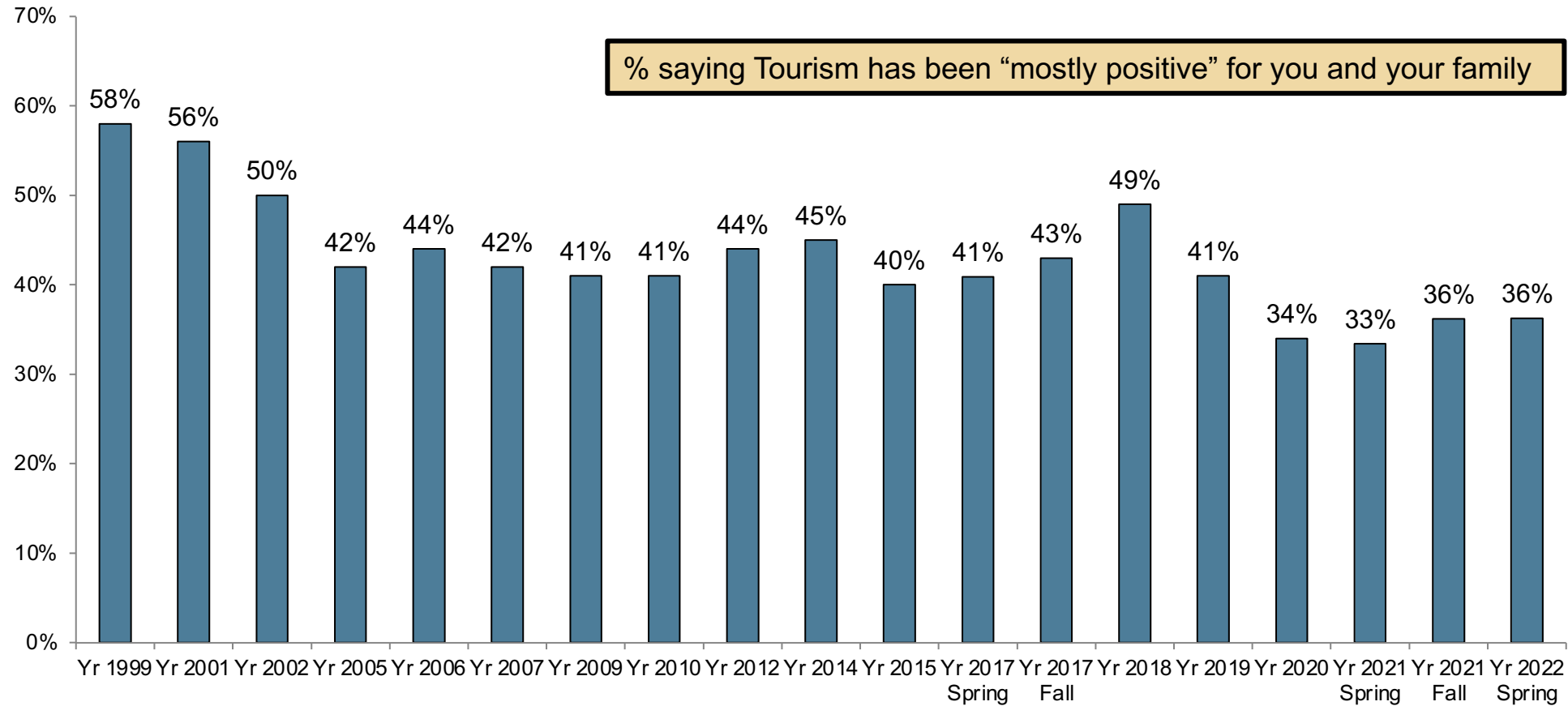
Top opportunities for destination management in Hawai'i hold steady

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



Base: Spring 2022 (856), Fall 2021 (973)
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

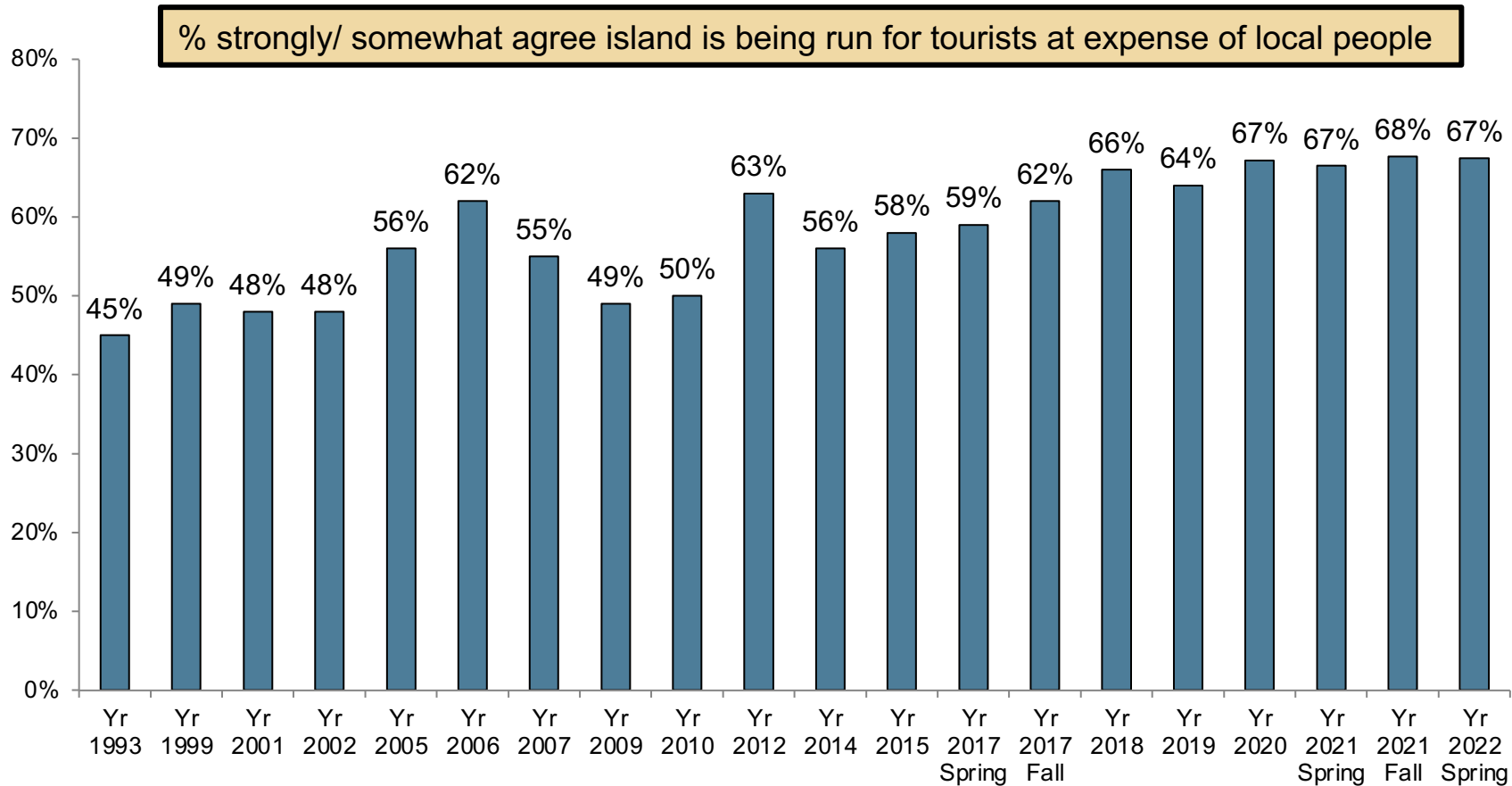
“Impact of Tourism on You & Your Family” holds steady



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?

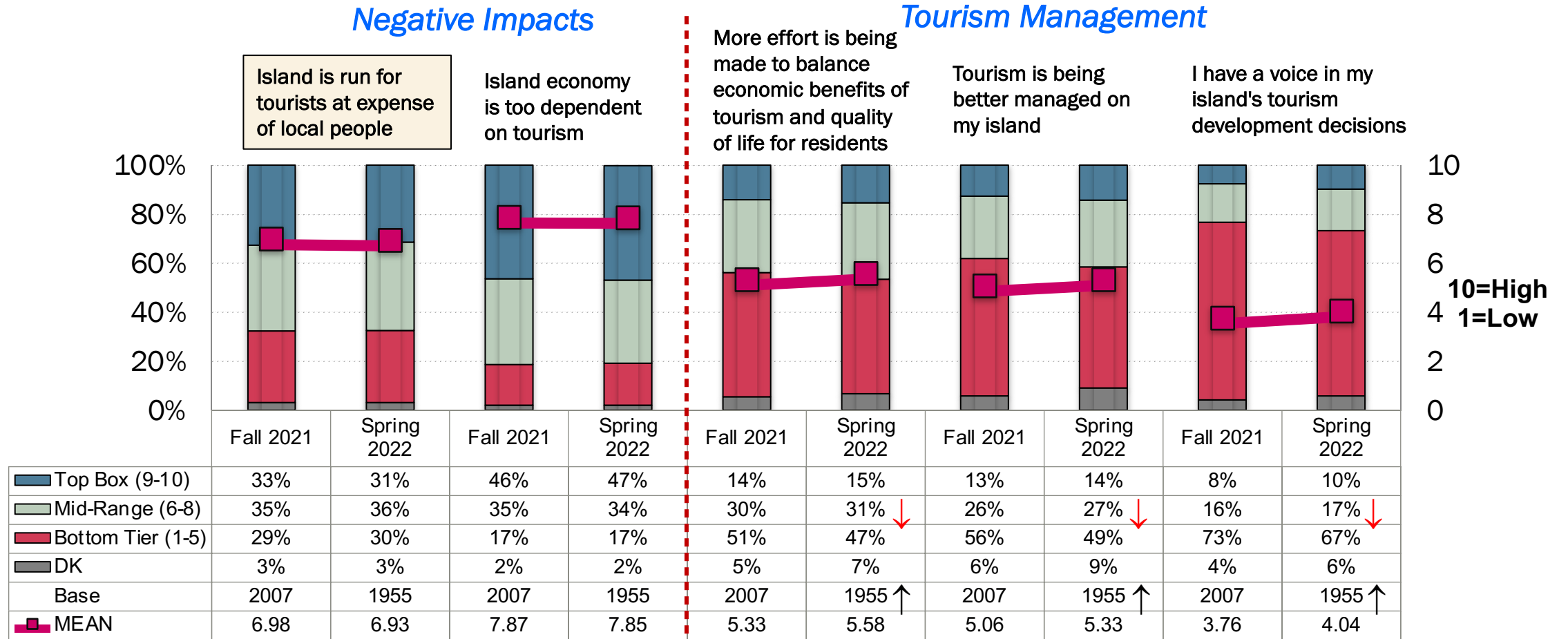
“This island is being run for tourists at the expense of local people” holds steady



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

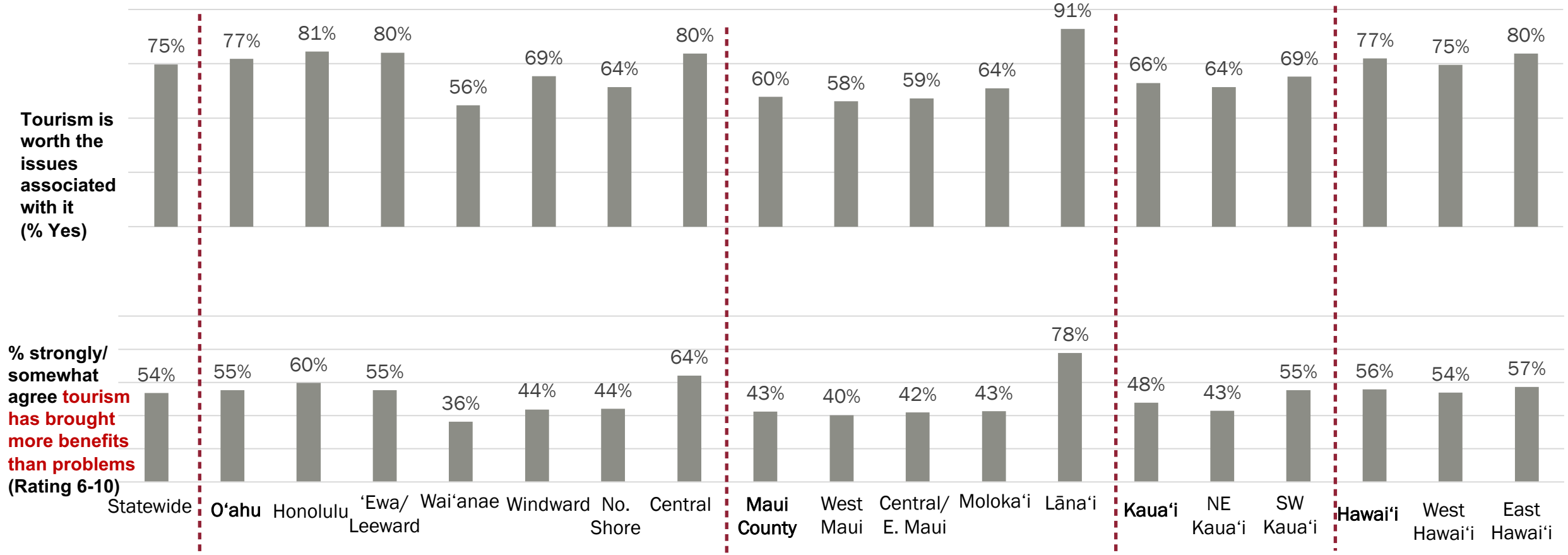
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Balance: Negative Impacts/Tourism Management Indicators



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

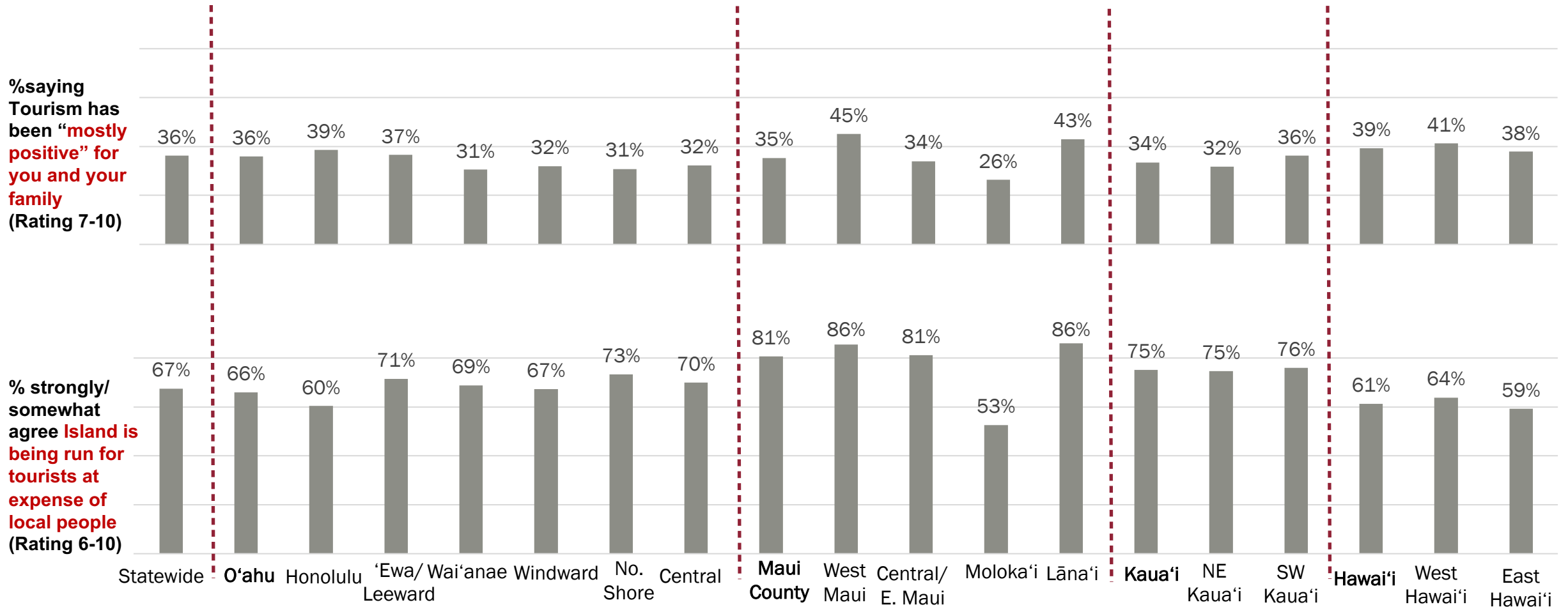
Tourism worth the issues/Benefits outweigh Problems by Island/Area



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

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

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



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

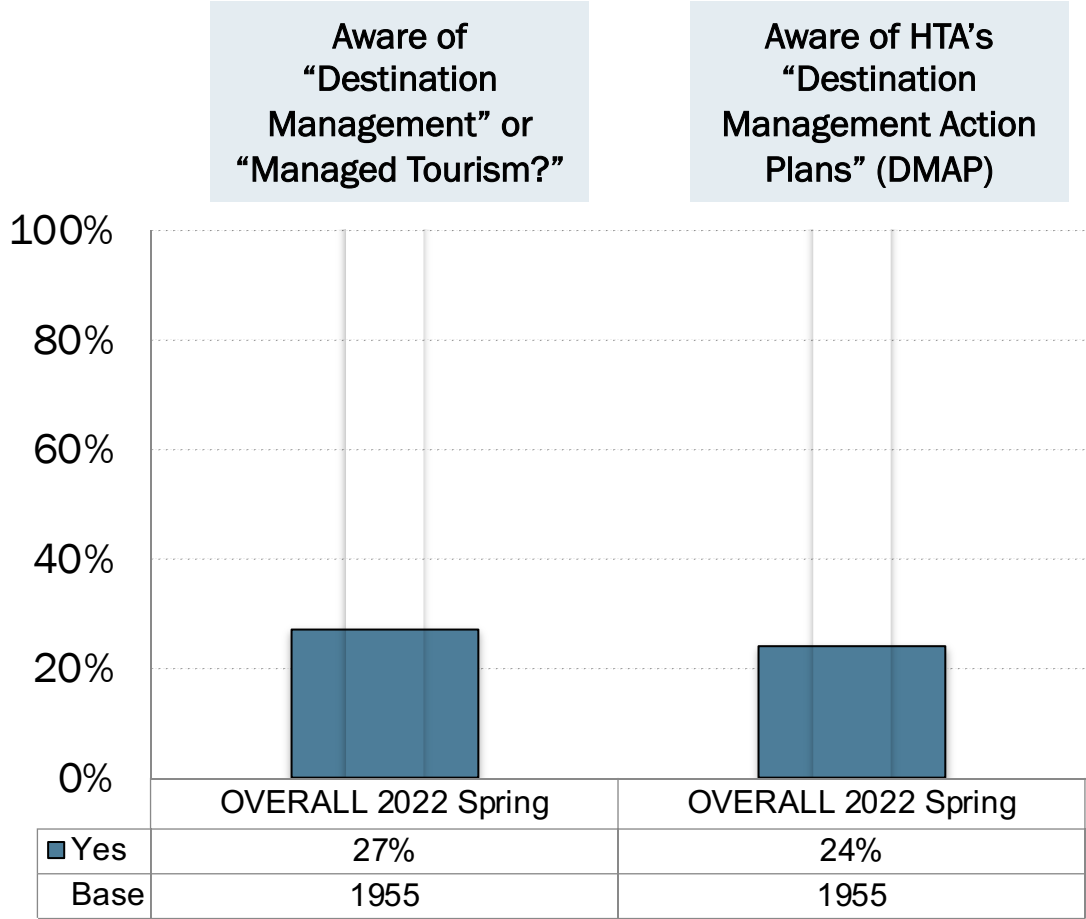
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?



2

The Current Setting: Residents who are aware of tourism management efforts are generally more positive towards tourism, but awareness is low.

Awareness of Tourism Management and DMAPs runs low, but improves Resident Sentiment

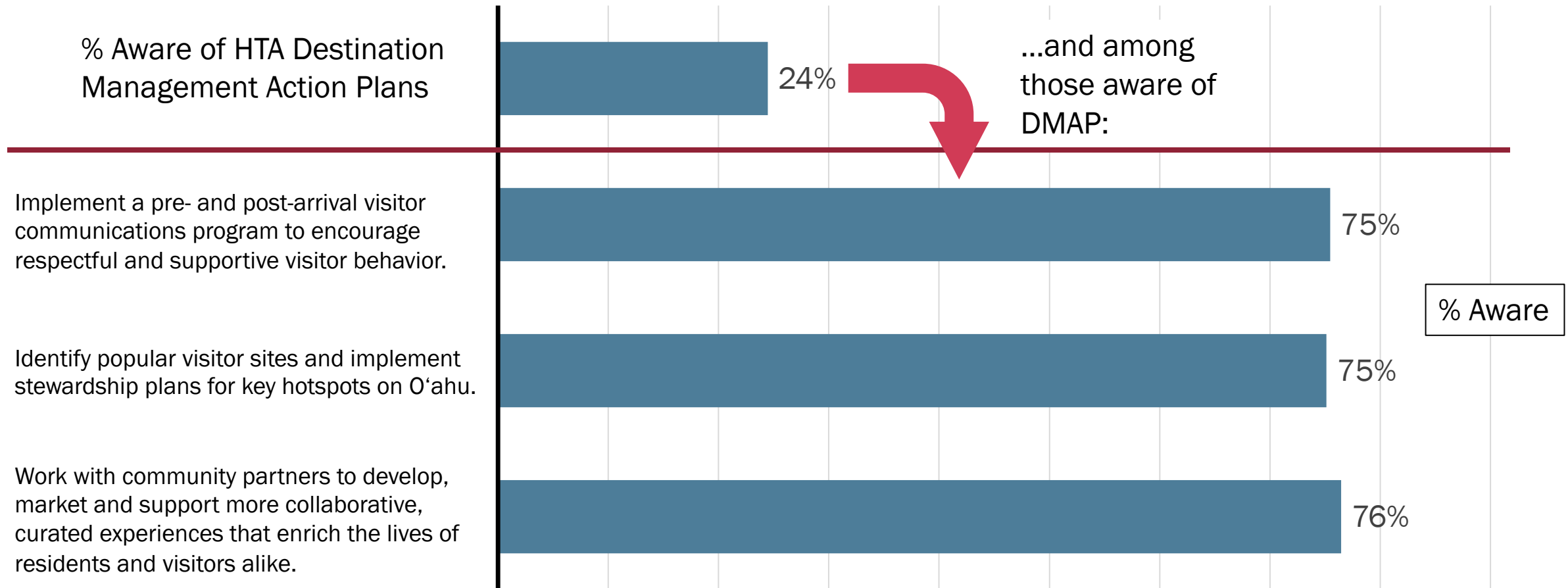


Mean Score	Aware of DMAP	Unaware of DMAP
Tourism has brought more benefits than problems	6.1	5.9
Perceived impact of tourism on you and your family	6.5	6.6
Tourism is being better managed on my island	5.8	5.2
Tourism should be actively encouraged on my island	6.0	6.1
More effort is being made to balance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

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

- Q9. Have you ever heard of "Destination Management" or "Managed Tourism?"
- Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state?

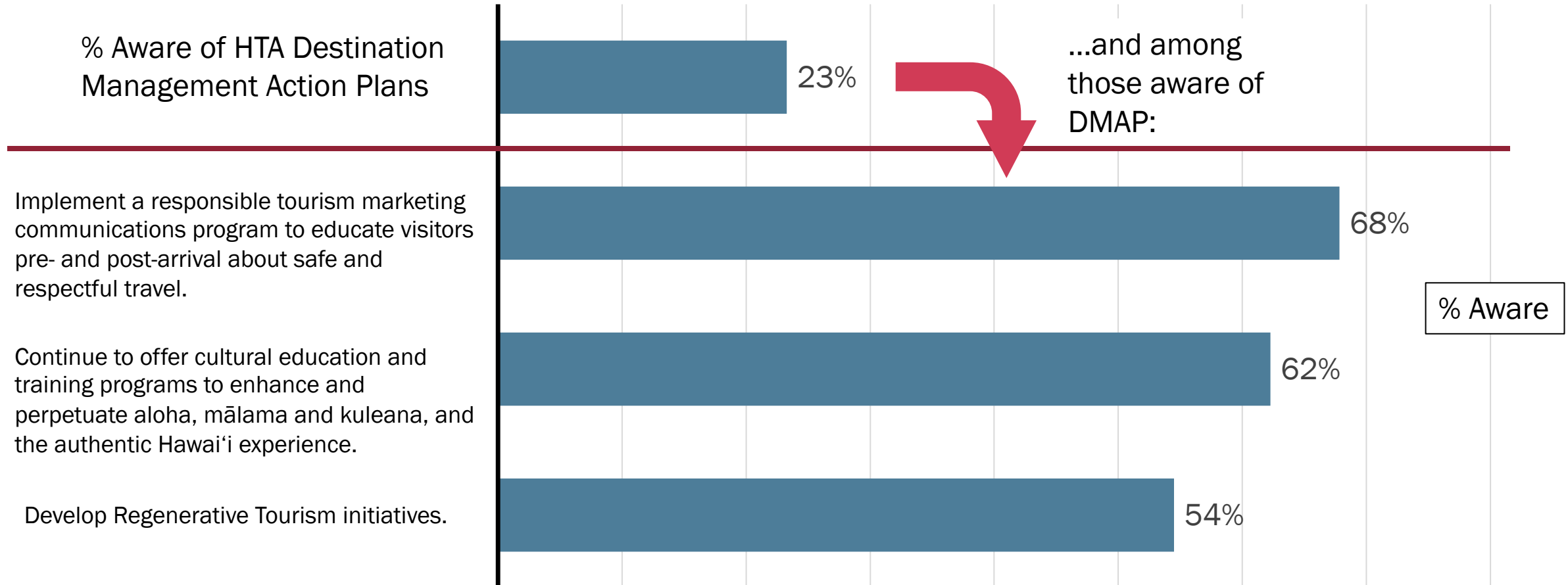
Destination Management Action Plans Awareness: O‘ahu



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

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

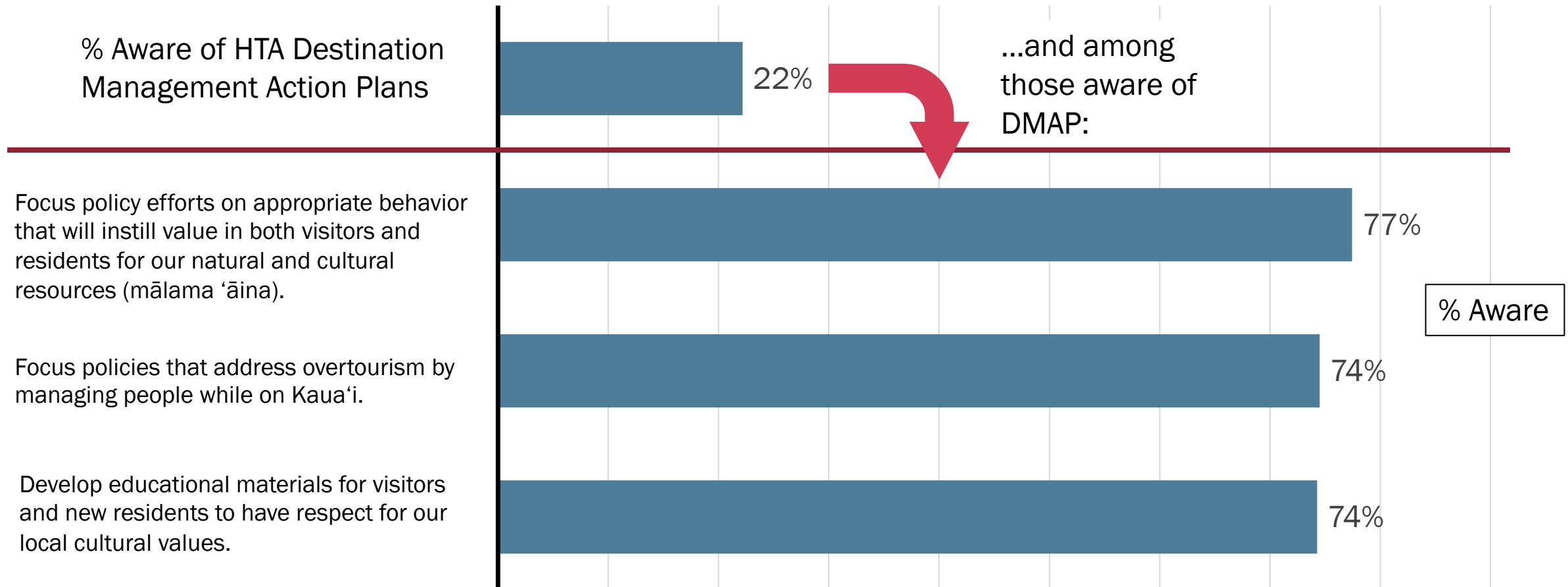
Destination Management Action Plans Awareness: Maui



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

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

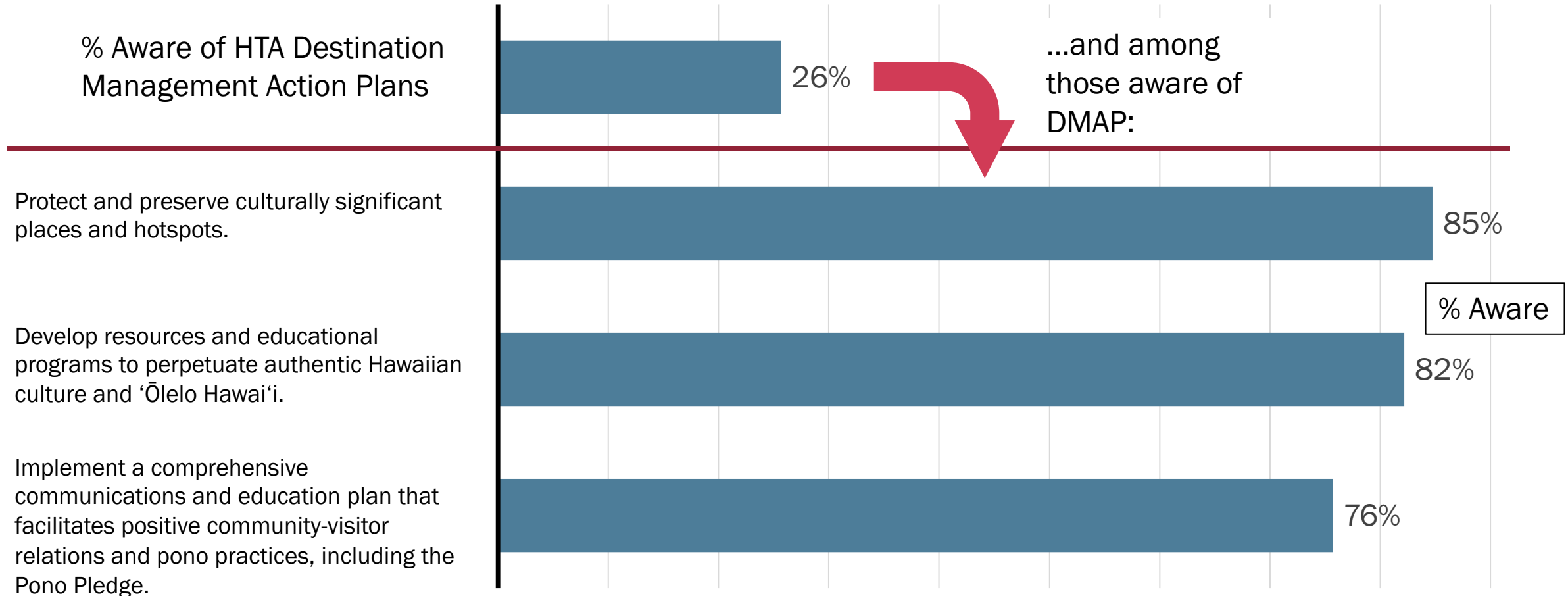
Destination Management Action Plans Awareness: Kaua'i



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

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

Destination Management Action Plans Awareness: Hawai'i Island



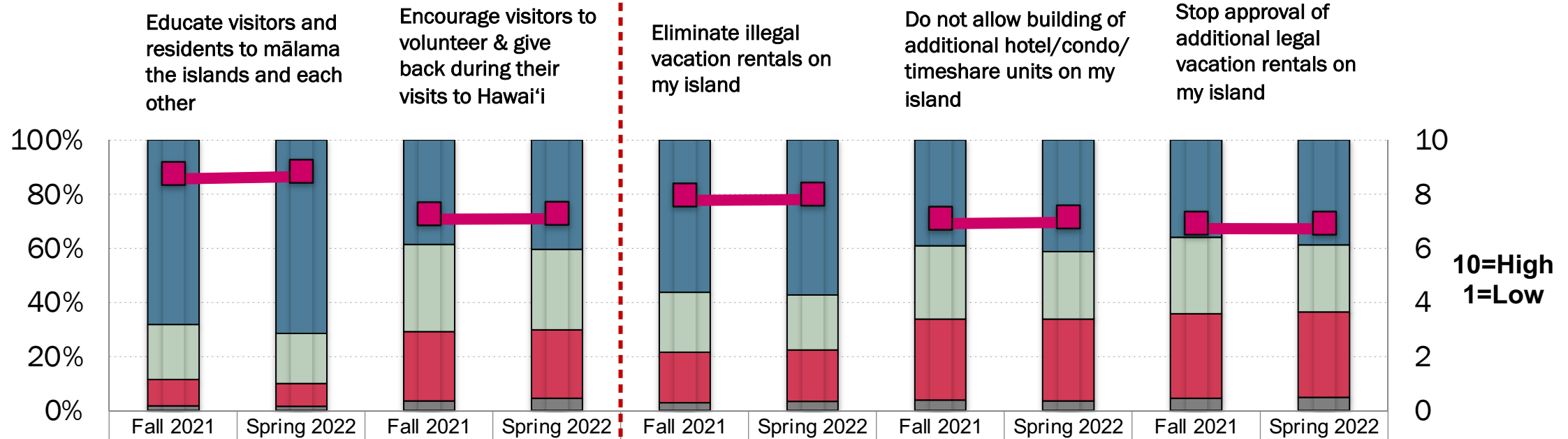
Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawaii Tourism Authority's efforts to better manage tourism in our state? (Base: 403)

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

Support for Regenerative & Accommodations tourism management strategies remains strong

Regenerative

Accommodations



	Fall 2021	Spring 2022	Fall 2021	Spring 2022	Fall 2021	Spring 2022	Fall 2021	Spring 2022	Fall 2021	Spring 2022
Top Box (9-10)	68%	72%	39%	40%	56%	57%	39%	41%	36%	39%
Mid-Range (6-8)	20%	19%	32%	30%	22%	20%	27%	25%	28%	25%
Bottom Tier (1-5)	10%	8%	26%	25%	19%	19%	30%	30%	31%	32%
DK	2%	1%	3%	5%	3%	3%	4%	4%	5%	5%
Base	2007	1955	2007	1955	2007	1955	2007	1955	2007	1955
MEAN	8.76	8.85	7.27	7.28	7.96	8.00	7.11	7.16	6.92	6.92

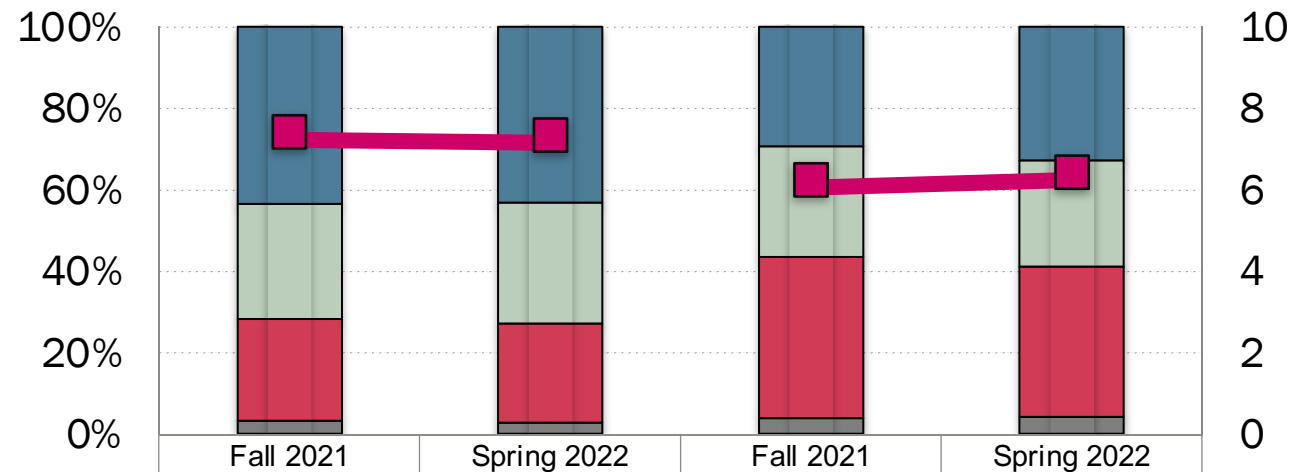
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

....as does support for visitor/resident access tourism management strategies

Access

Charge visitor access fees to state parks and trails

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

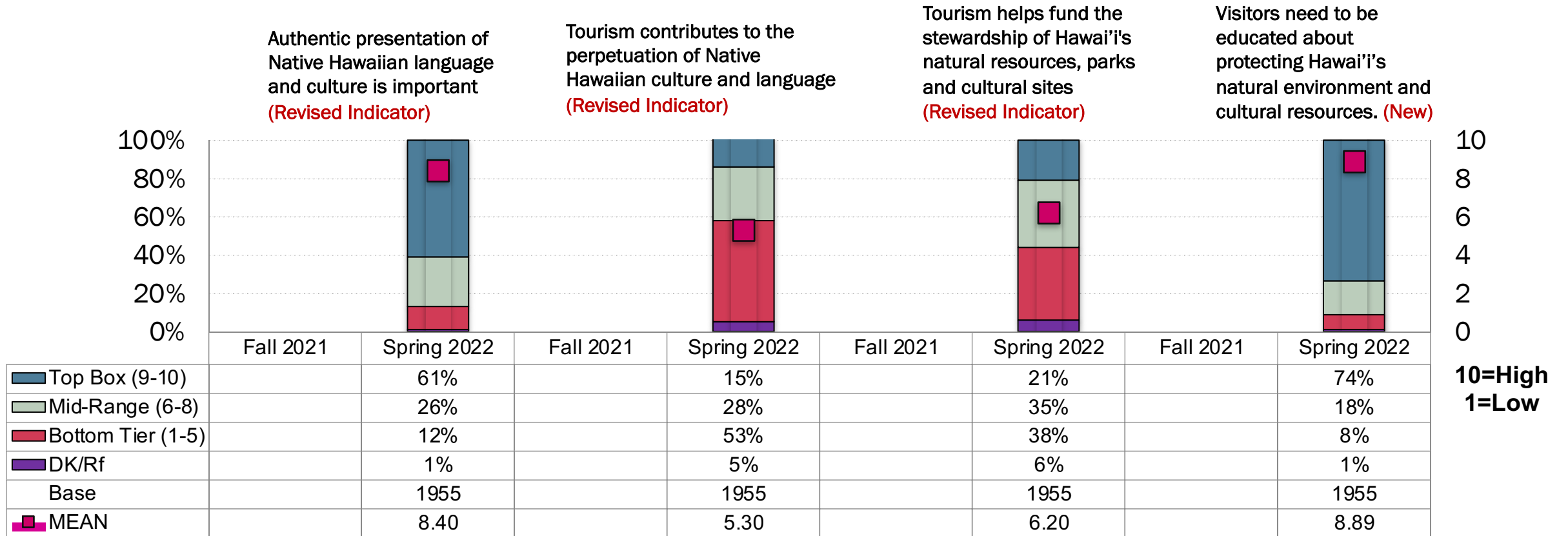


	Fall 2021	Spring 2022	Fall 2021	Spring 2022
Top Box (9-10)	44%	43%	29%	33%
Mid-Range (6-8)	28%	30%	27%	26%
Bottom Tier (1-5)	25%	24%	40%	37%
DK	3%	3%	4%	4%
Base	2007	1955	2007	1955
MEAN	7.42	7.35	6.25	6.44

10=High
1=Low

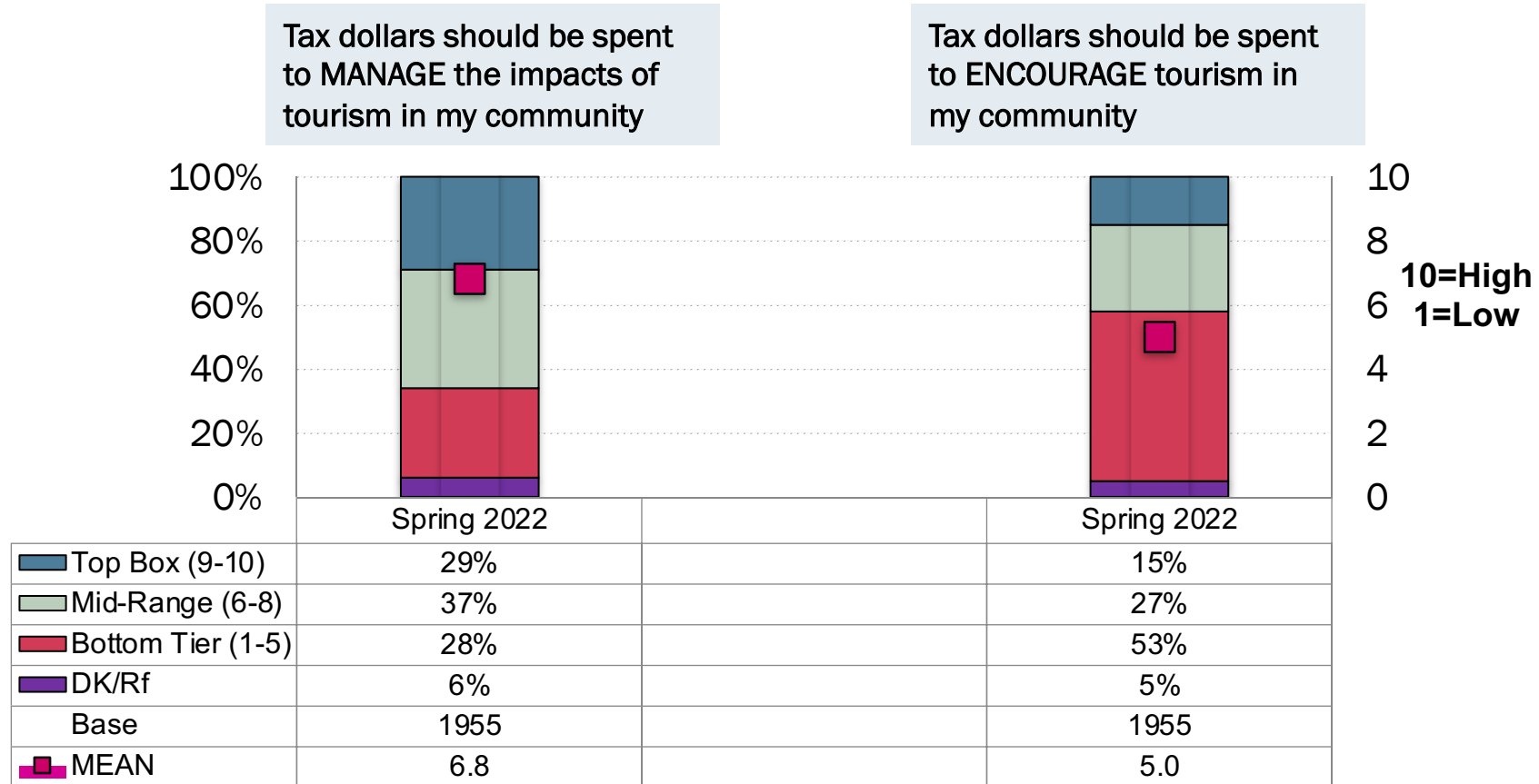
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Native Hawaiian Cultural & Sustainability Indicators



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

Residents express strong support for using tax dollars to *Manage* tourism, less so to *Encourage* Tourism



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]

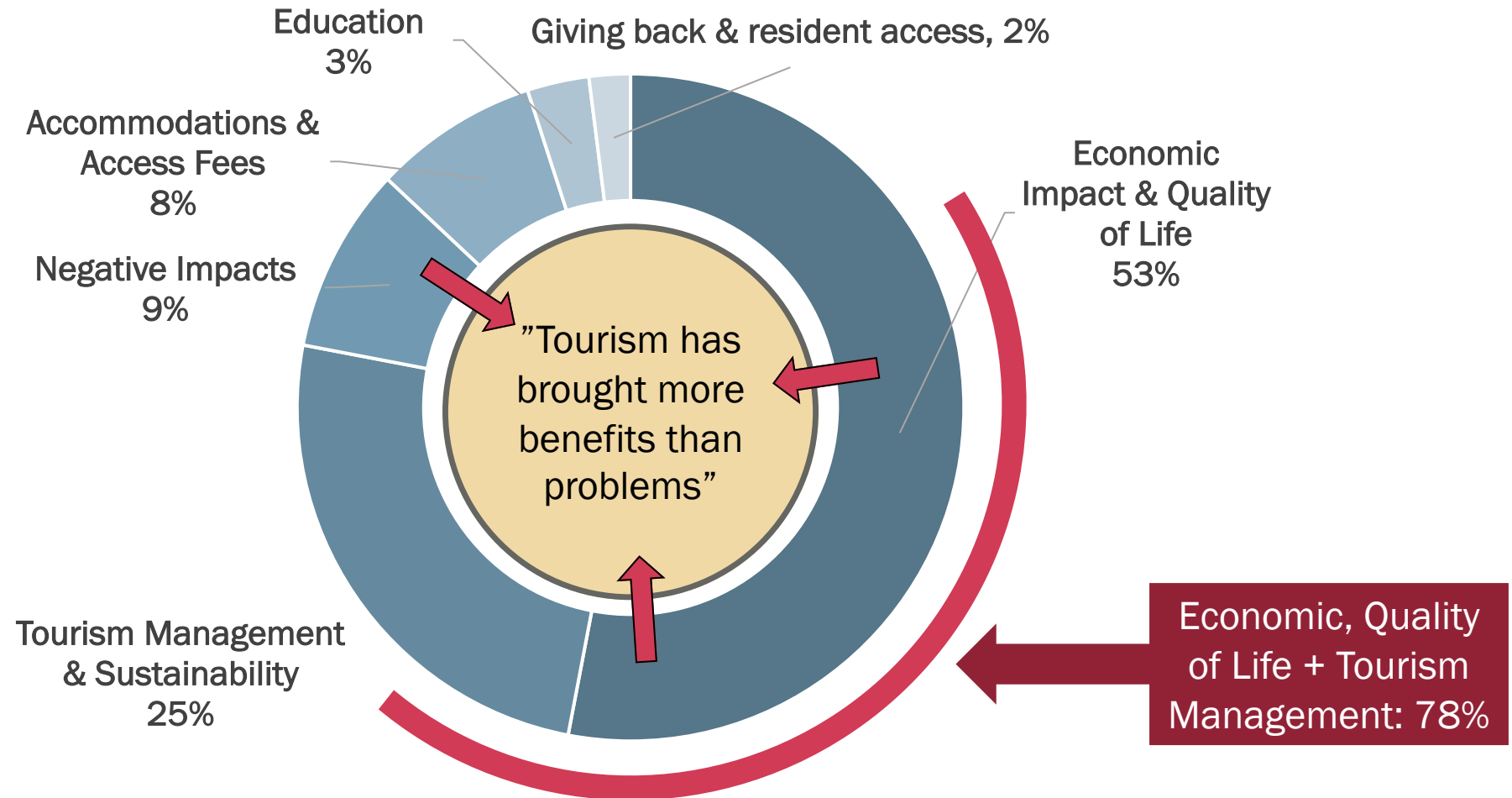


3

The Next Chapter: To fuel further improvement in resident sentiment, continue to build tourism management efforts, and economic/quality of life benefits of tourism.

Economic/Quality of Life Benefits + Tourism Management = Resident Sentiment

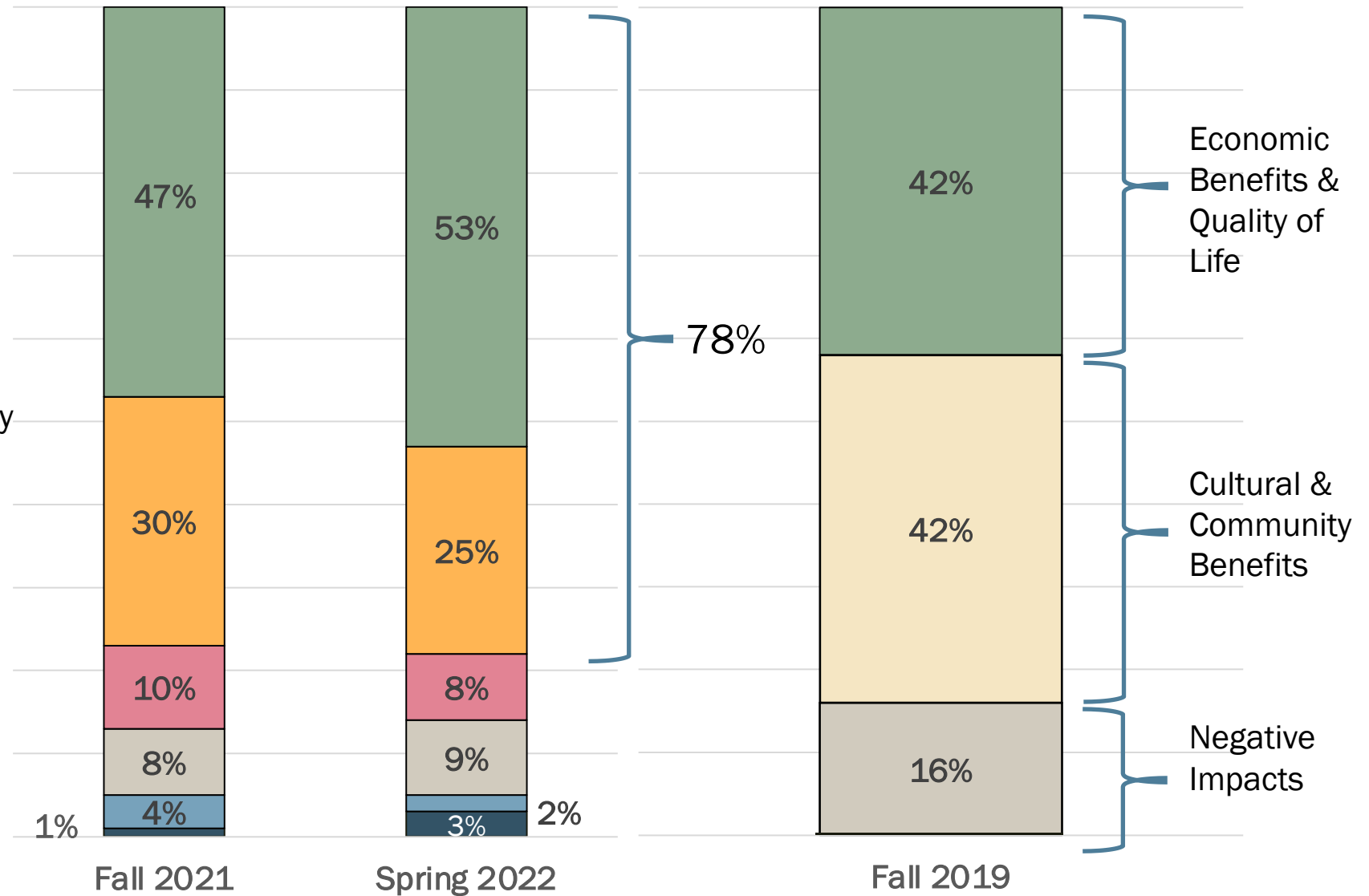
Drivers of Resident Sentiment – Spring 2022



Resident sentiment drivers holding steady

Drivers of Resident Sentiment: Spring 2021 to Fall 2022

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





Mahalo from the Omnitrak Group



Appendices

Background Information

Tourism Management Ratings

Overview of Spring 2022 Indicators

Is Tourism Worth the Issues?

Problems Created by Tourism



Appendix A: Background Information: Research Objectives, Sample Plan & Methodology

Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state's economy overall.
- The Resident Sentiment Survey (RSS) has been conducted 19 times since 1999, and the current survey was conducted by Omnitrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai'i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.

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

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

Sample Plan and Methodology

Sample Plan

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

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

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

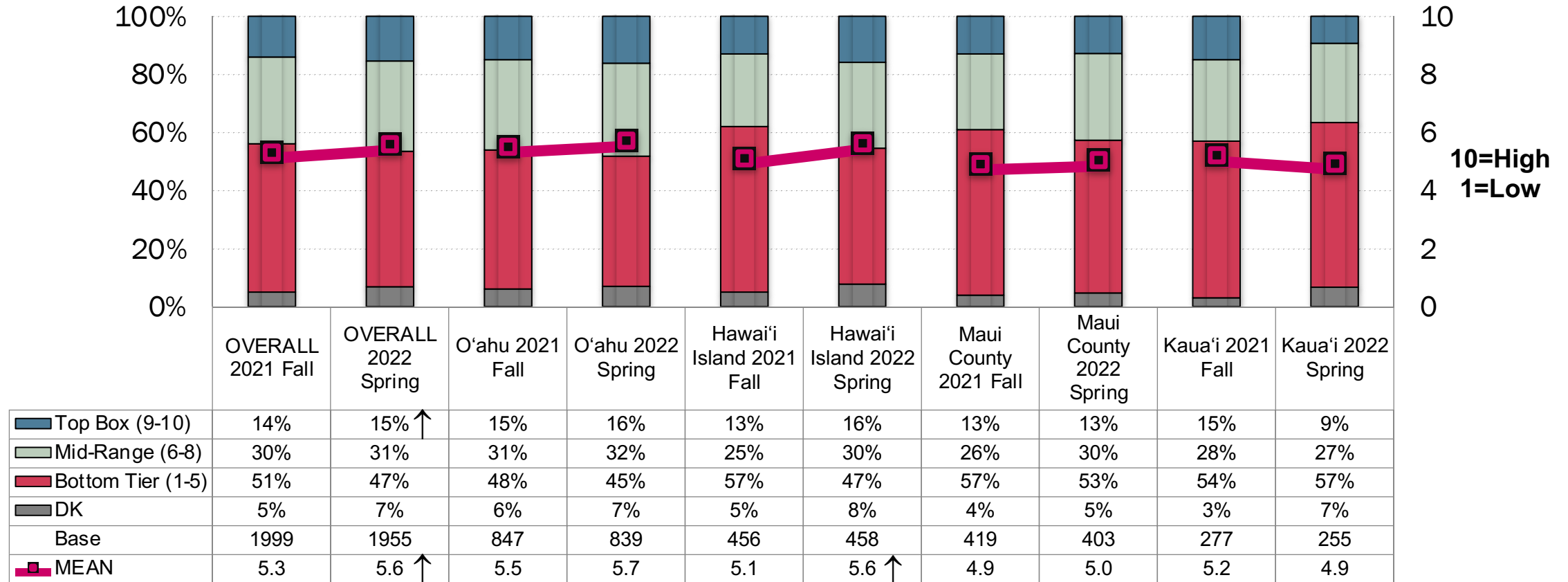
Methodology

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



Appendix B: Resident Ratings of Tourism Management Efforts & Strategies

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



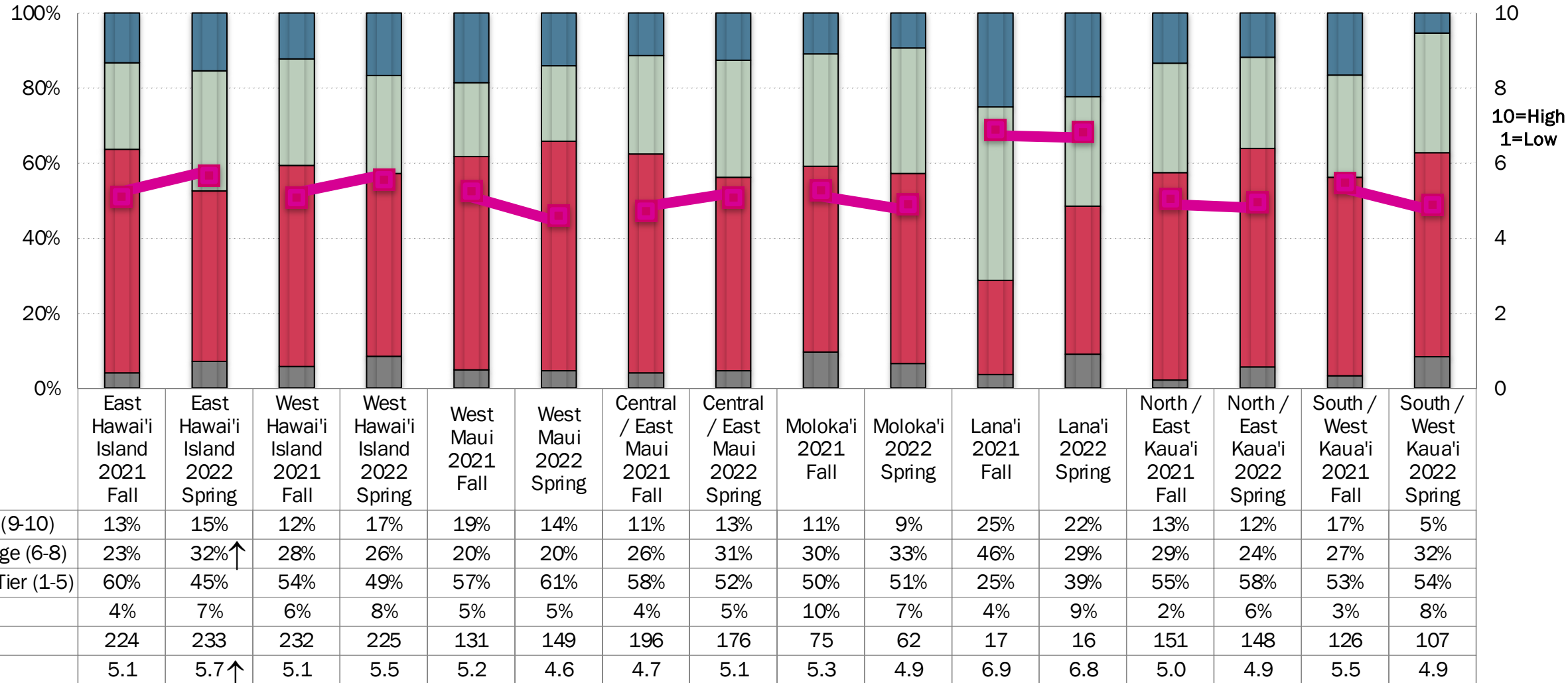
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



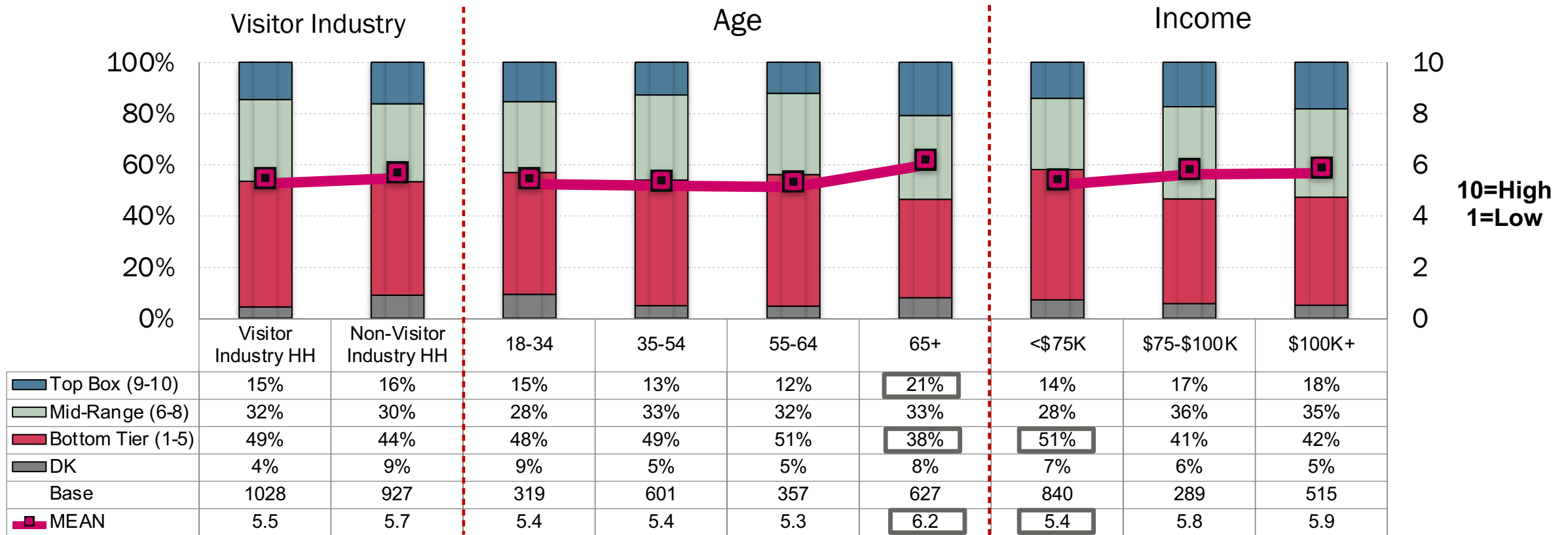
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



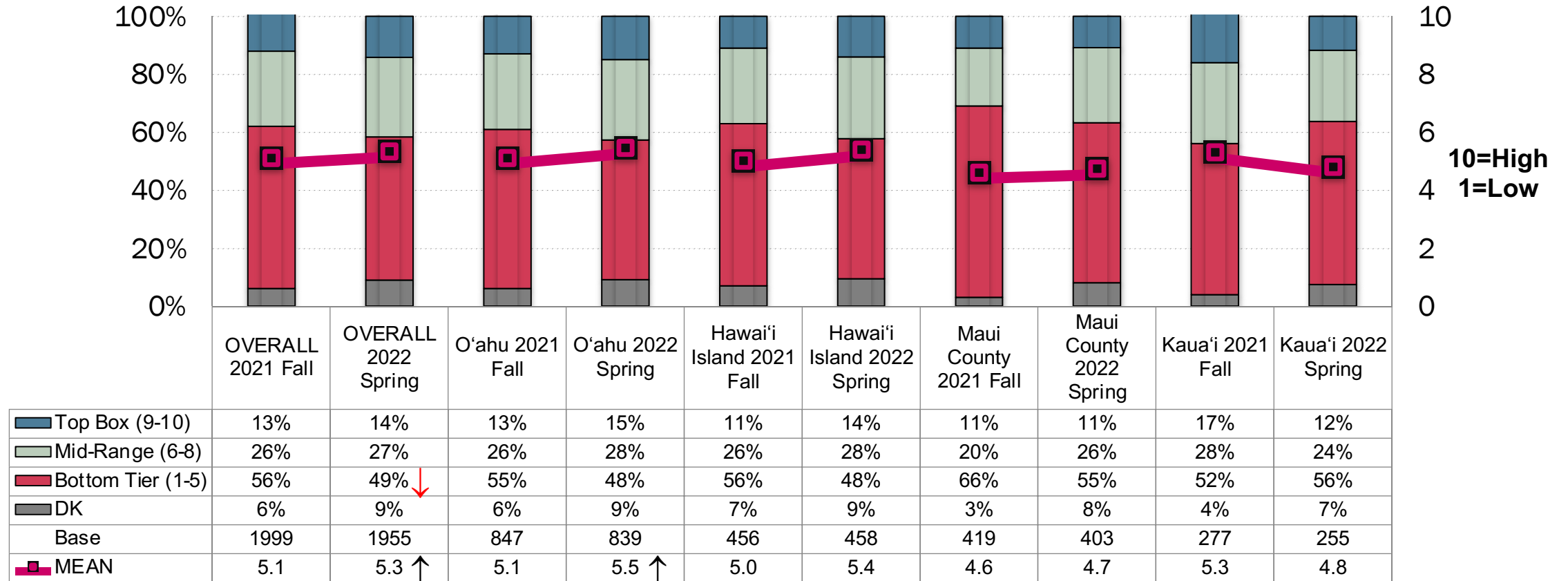
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



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

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



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

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

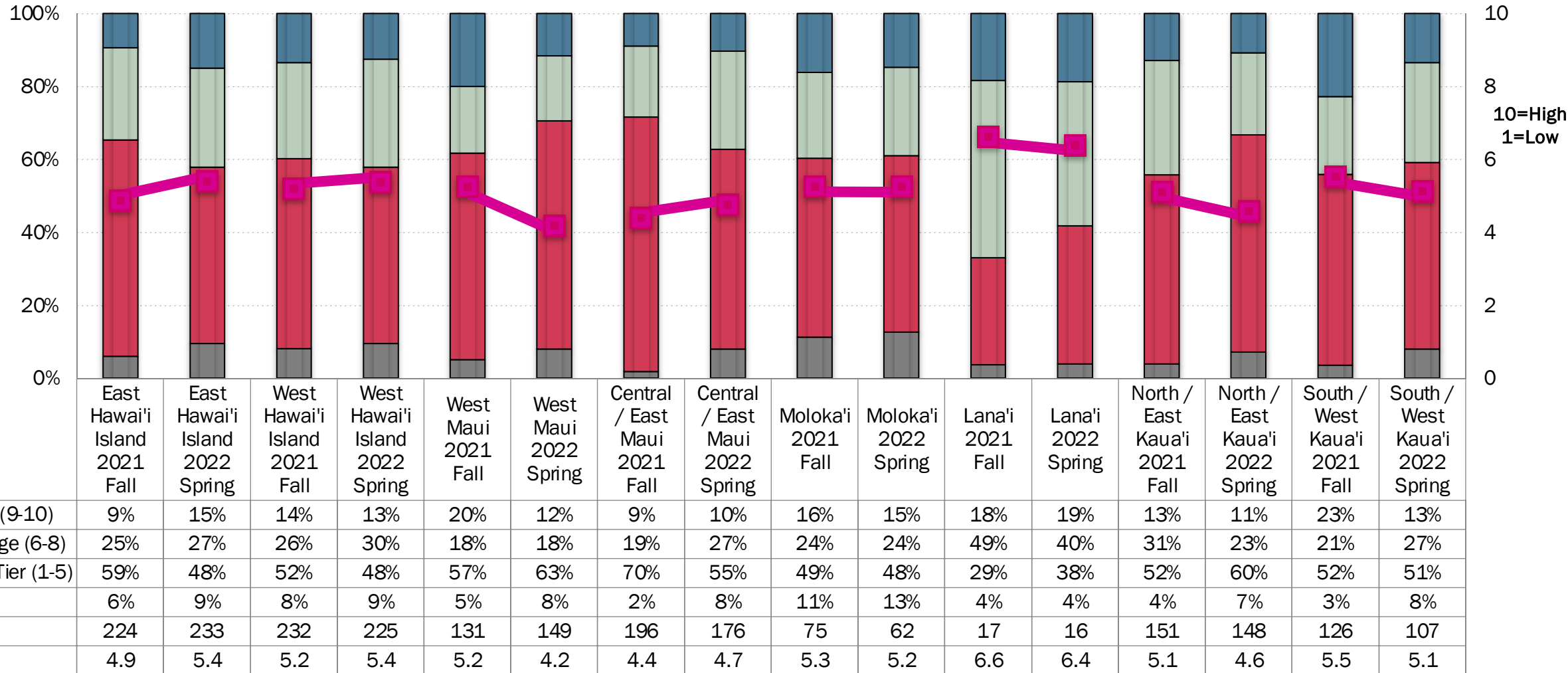
- *By O’ahu Area*



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

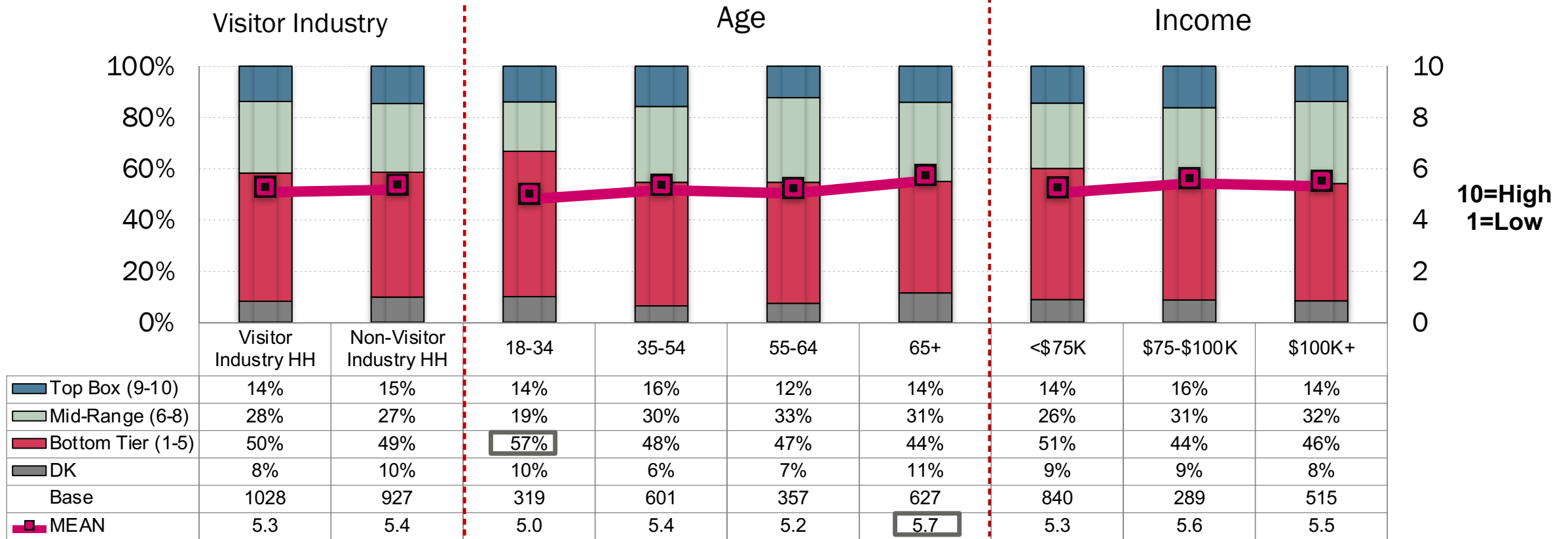
“I feel like tourism is being better managed on my island”

– *By Neighbor Island Area*



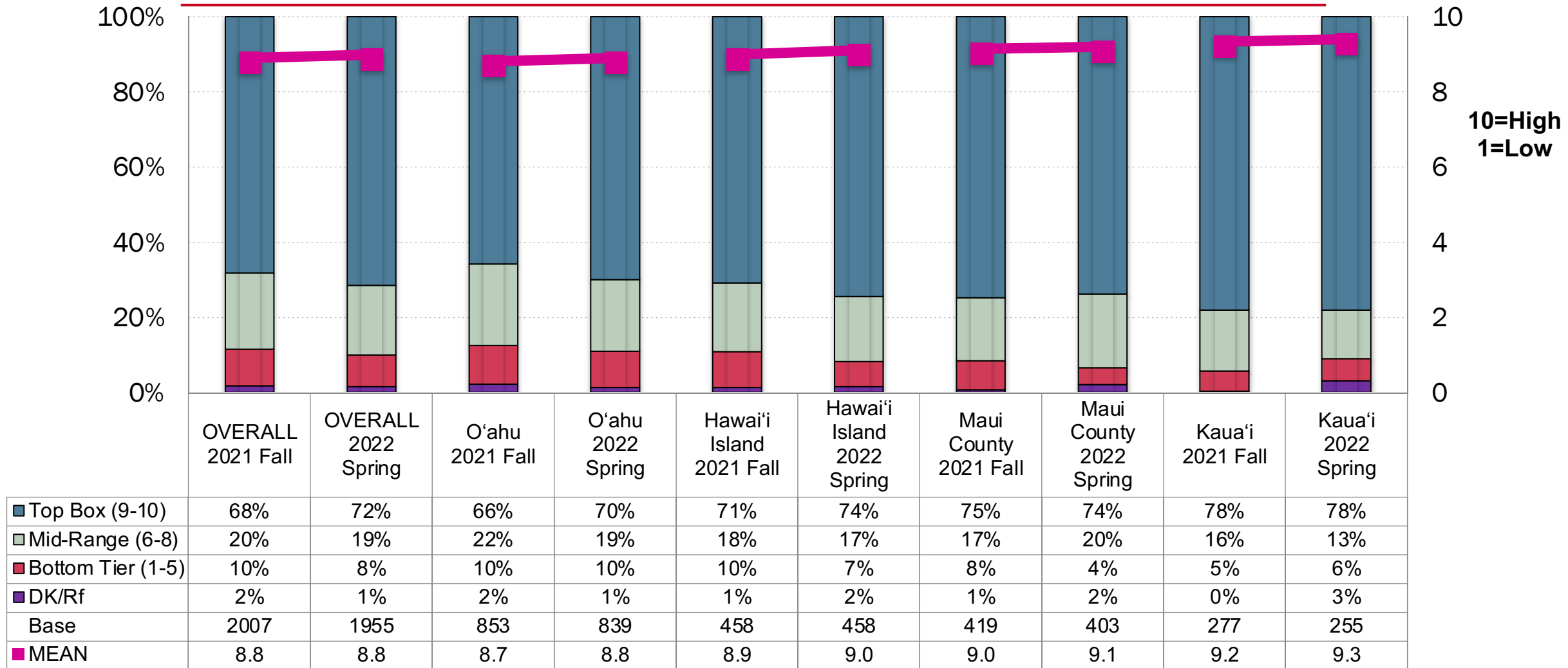
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



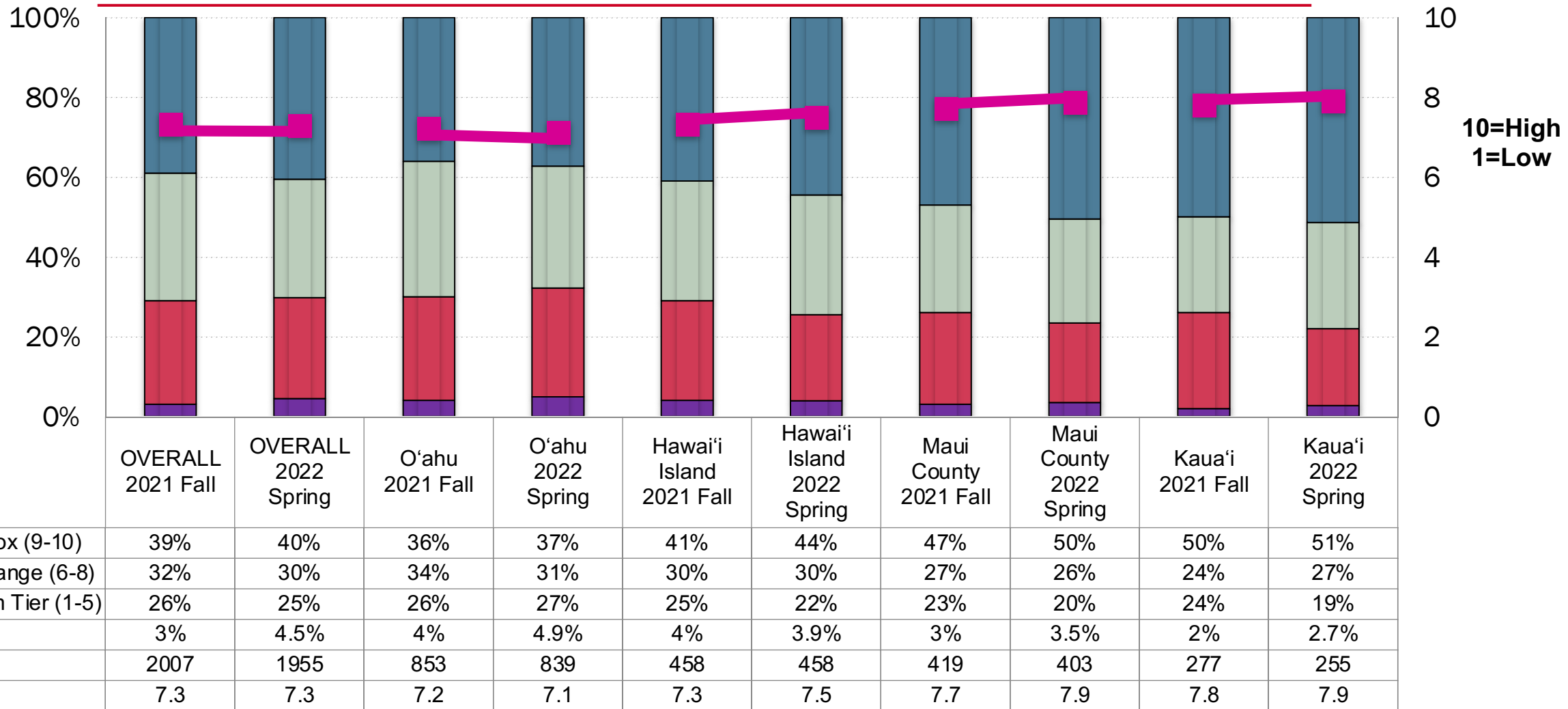
Q4. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



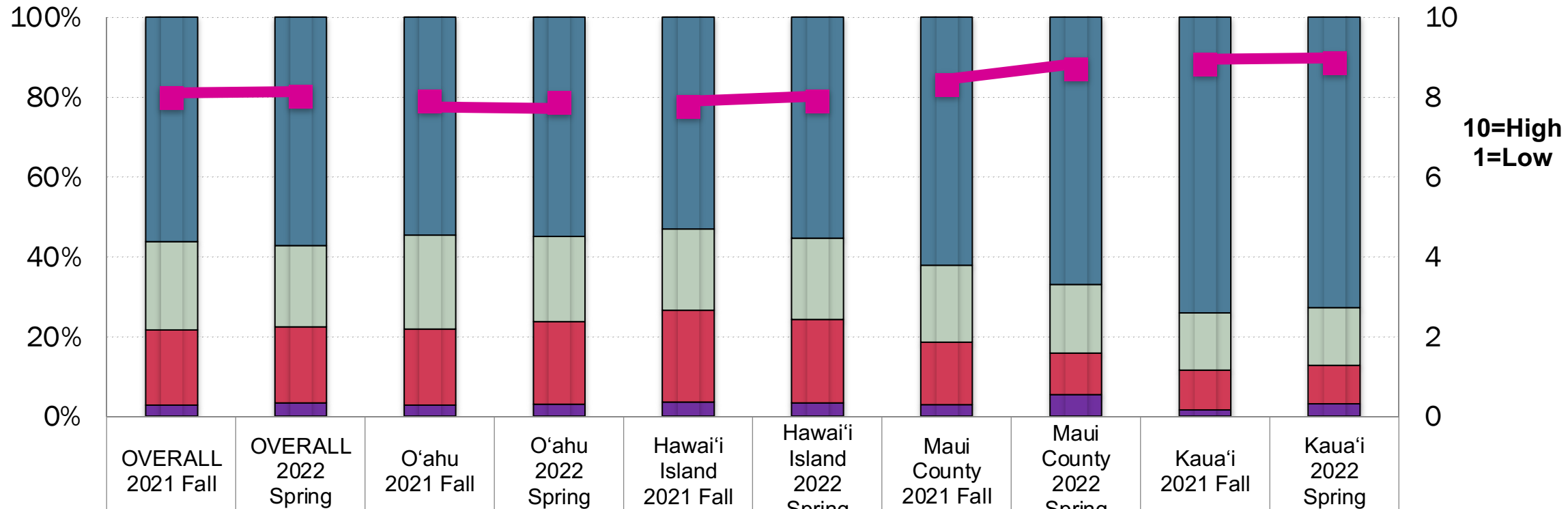
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



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

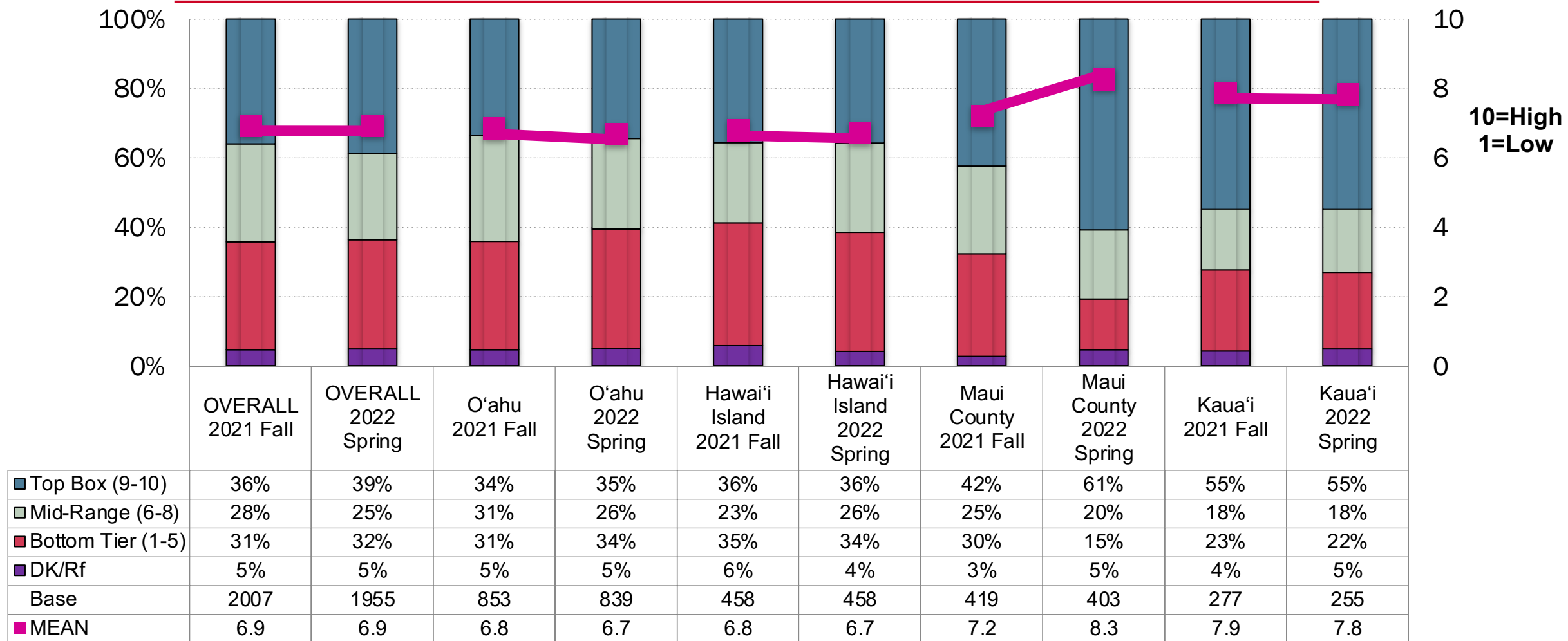
Accommodations: “Eliminate illegal vacation rentals on my island” – *By Island*



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

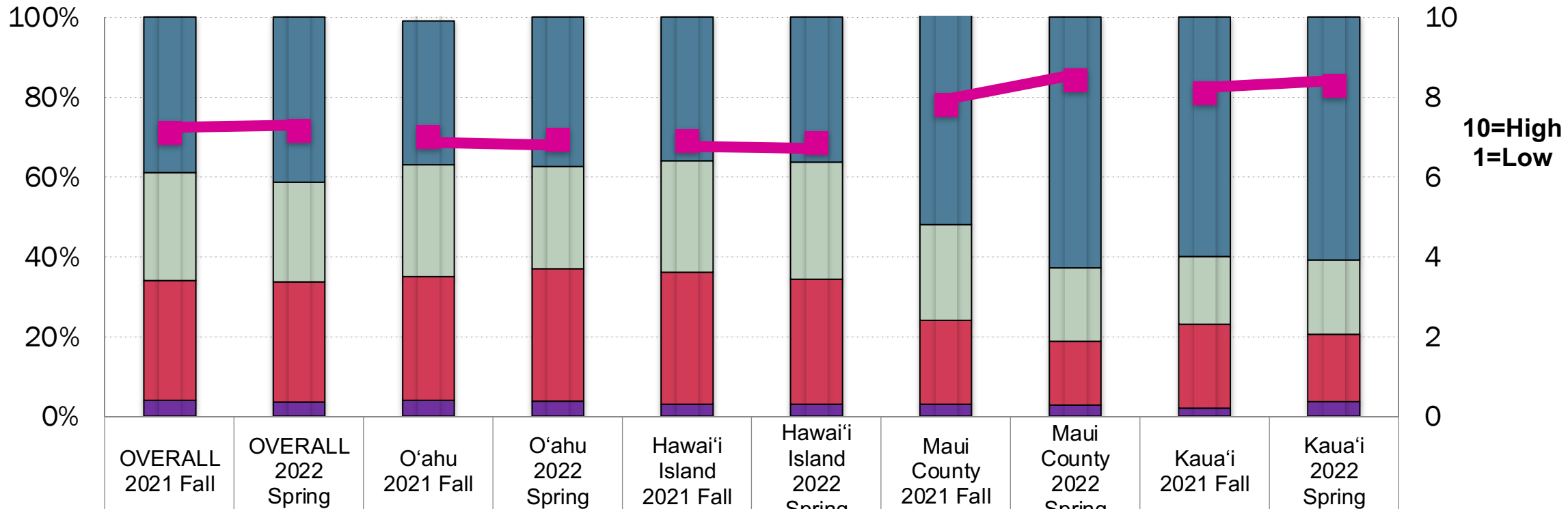
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



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

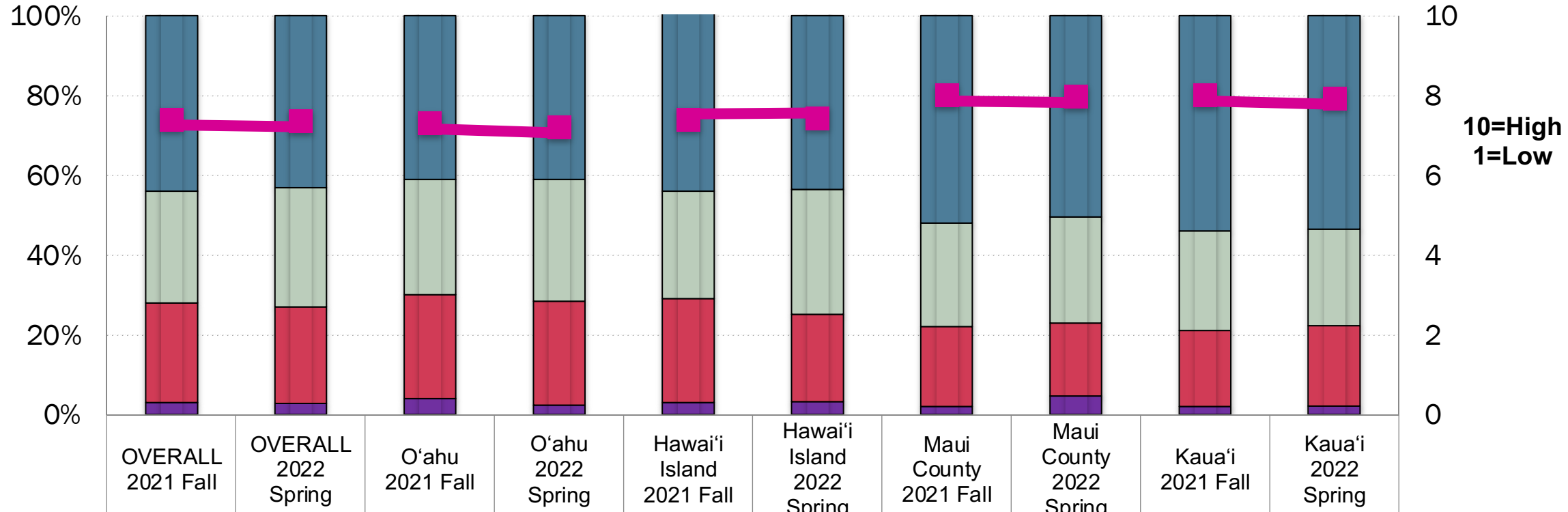
Accommodations: “Do not allow building of additional hotel/condo/timeshare units on my island” – *By Island*



	OVERALL 2021 Fall	OVERALL 2022 Spring	O‘ahu 2021 Fall	O‘ahu 2022 Spring	Hawai‘i Island 2021 Fall	Hawai‘i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua‘i 2021 Fall	Kaua‘i 2022 Spring
■ Top Box (9-10)	39%	41%	36%	37%	36%	36%	53%	63% ↑	60%	61%
■ Mid-Range (6-8)	27%	25%	28%	26%	28%	29%	24%	18%	17%	19%
■ Bottom Tier (1-5)	30%	30%	31%	33%	33%	31%	21%	16%	21%	17%
■ DK/Rf	4%	4%	4%	4%	3%	3%	3%	3%	2%	4%
Base	2007	1955	853	839	458	458	419	403	277	255
■ MEAN	7.1	7.2	7.0	6.9	6.9	6.8	7.8	8.4	8.1	8.3

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

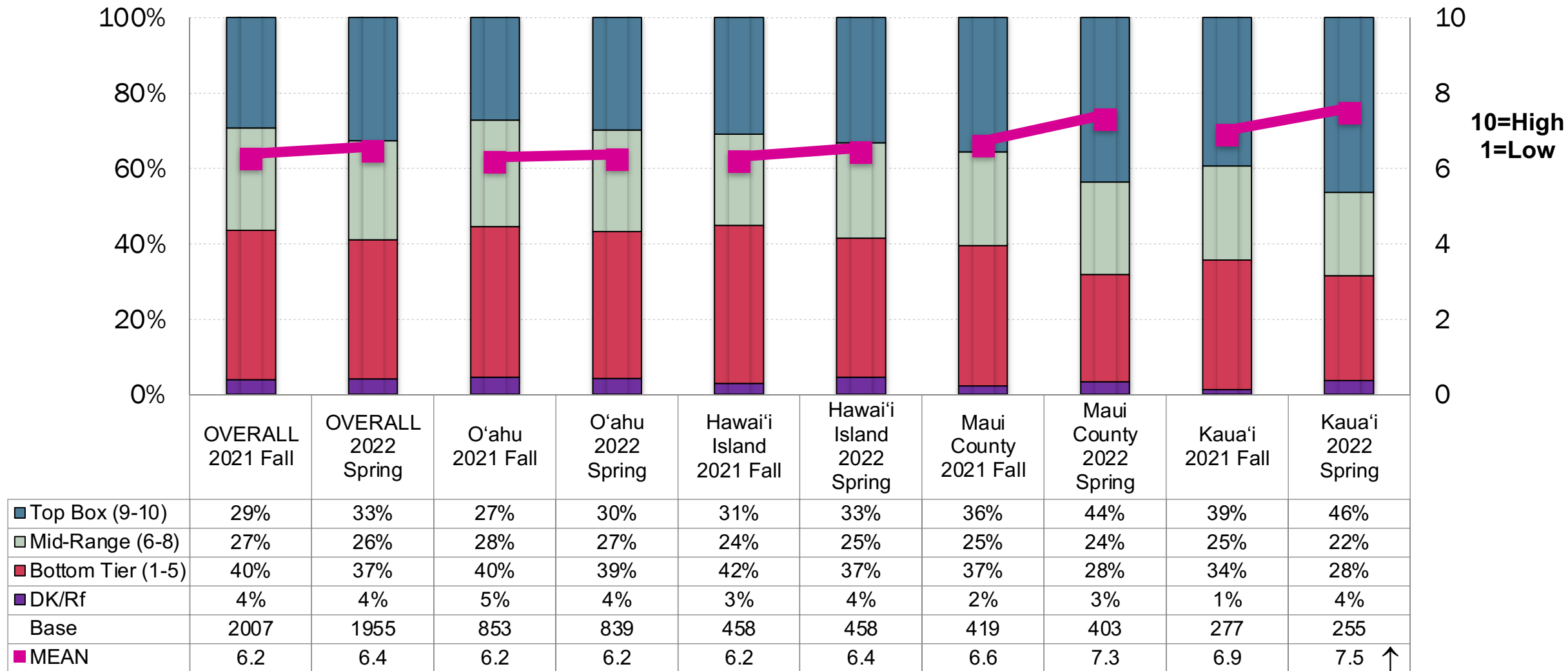
Access: “Charge visitor access fees to state parks and trails” – By Island



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

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

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

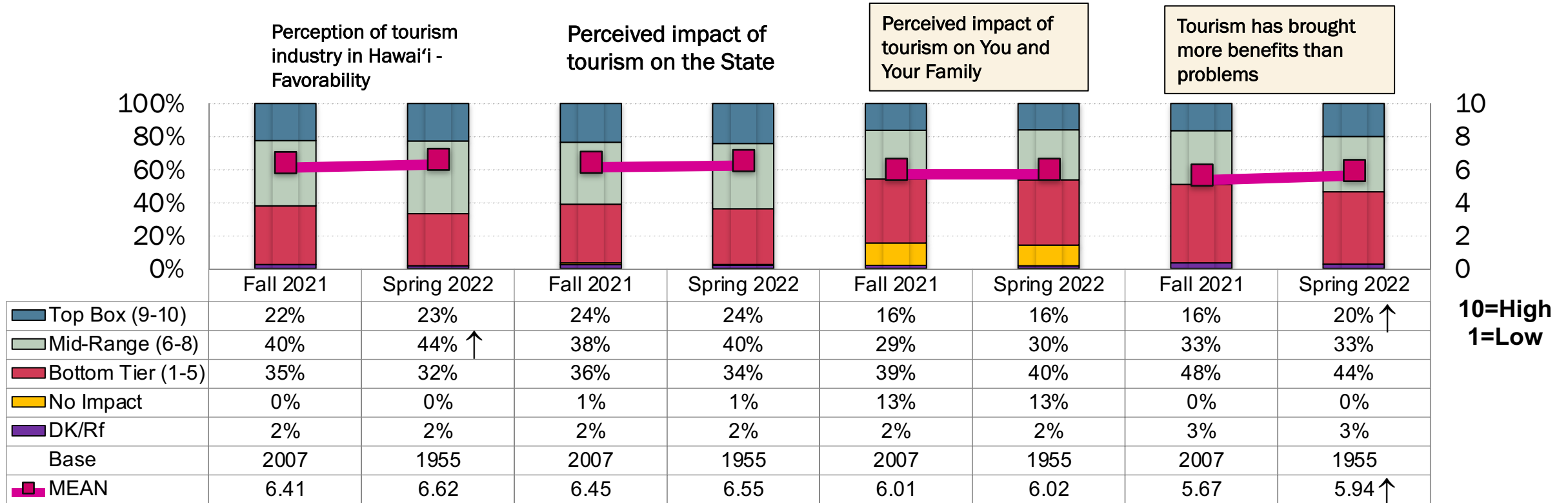


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



Appendix C: Overview of Spring 2022 Resident Sentiment Indicators

High Level Indicators of Resident Sentiment



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.

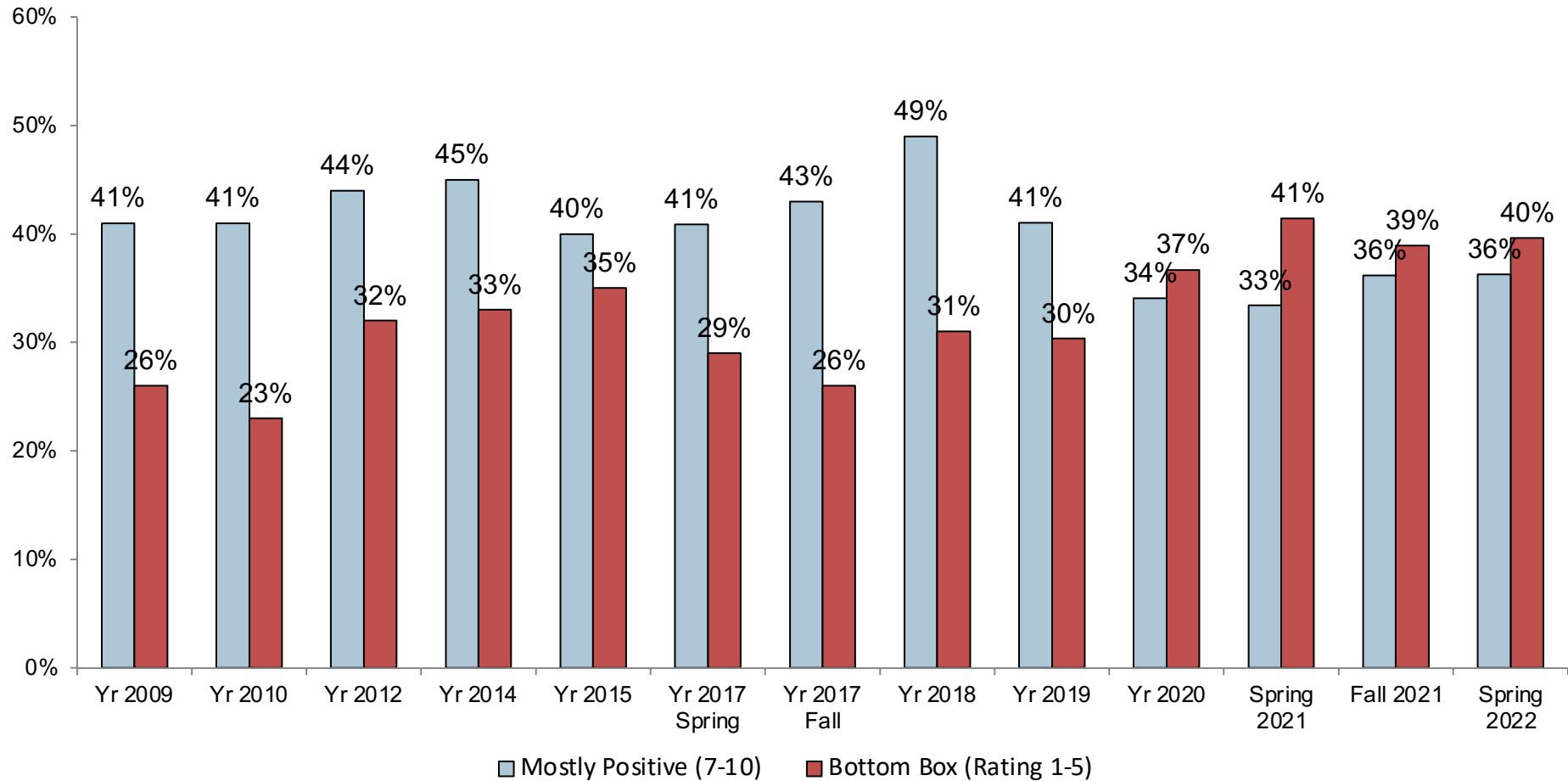
Q2a/b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

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.

10
8
6
4
2
0

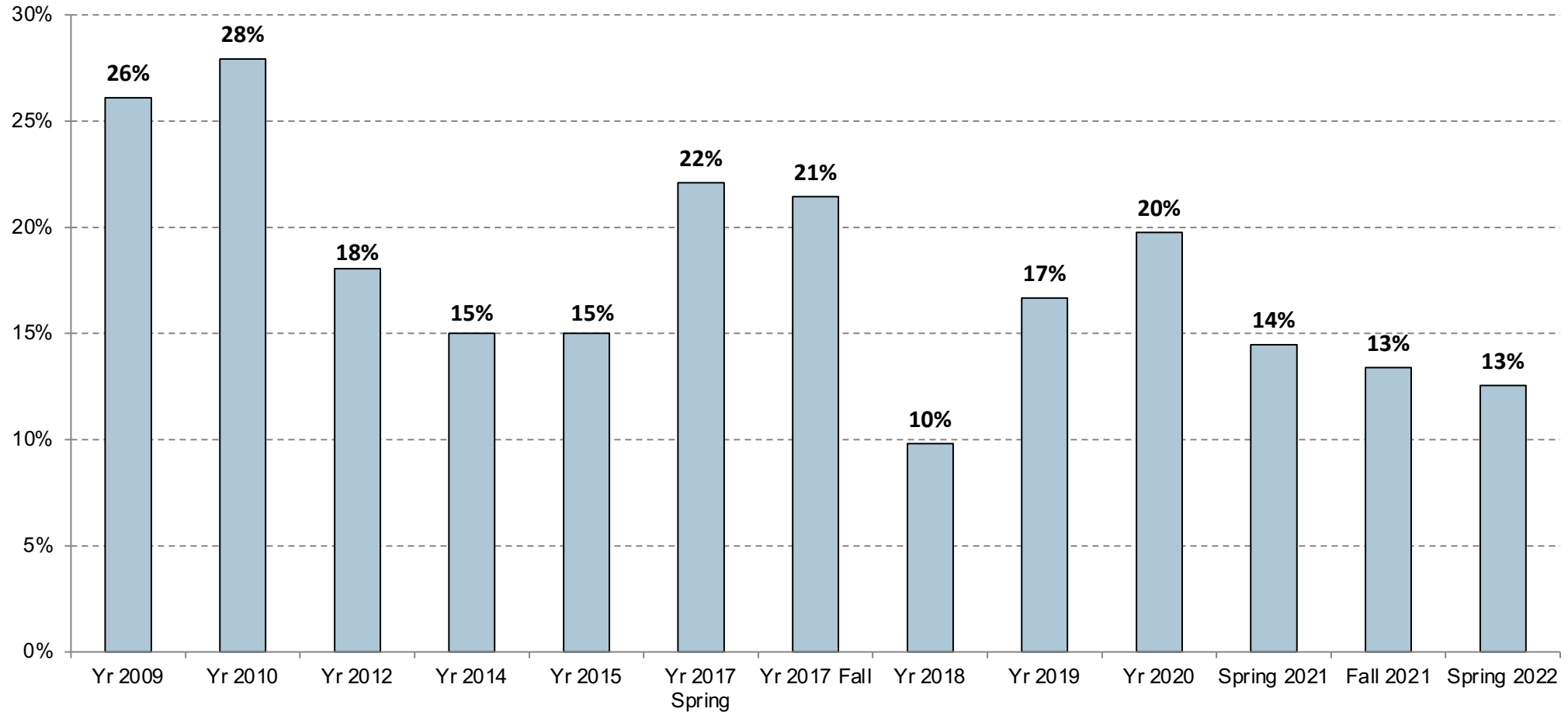
10=High
1=Low

Impact of Tourism on You & Your Family



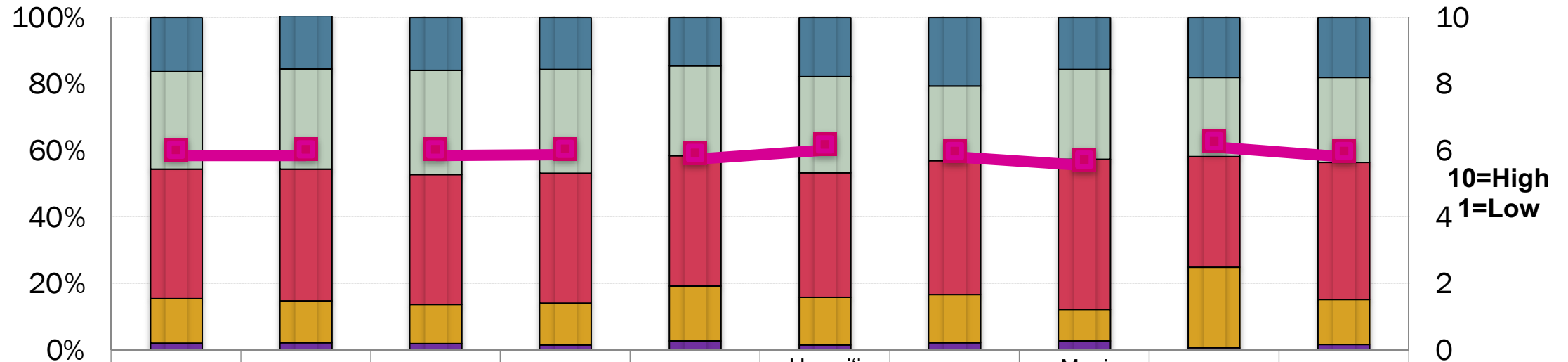
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – No Impact



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

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

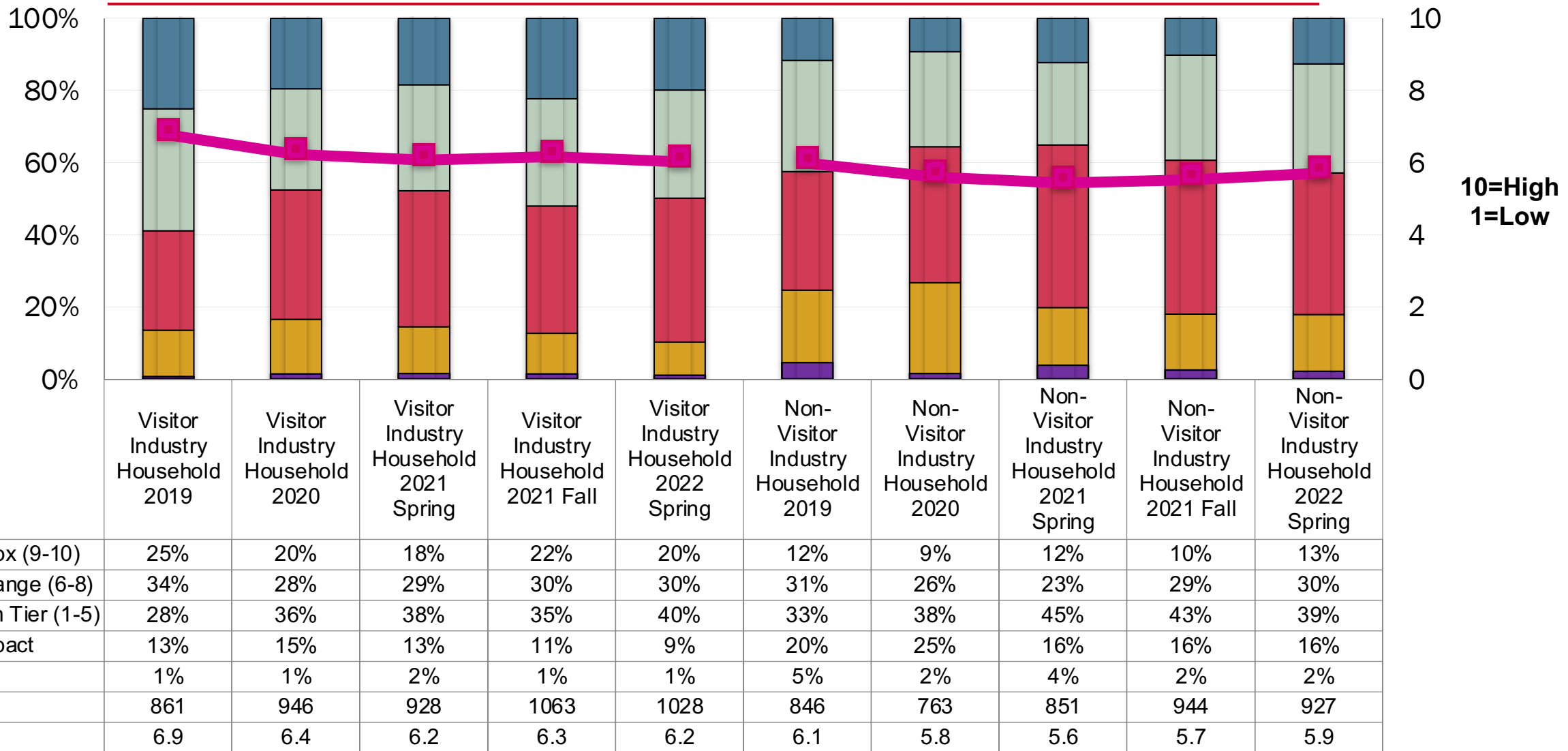


	OVERALL 2021 Fall	OVERALL 2022 Spring	O'ahu 2021 Fall	O'ahu 2022 Spring	Hawai'i Island 2021 Fall	Hawai'i Island 2022 Spring	Maui County 2021 Fall	Maui County 2022 Spring	Kaua'i 2021 Fall	Kaua'i 2022 Spring
Top Box (9-10)	16%	16%	16%	16%	14%	18%	21%	16%	18%	18%
Mid-Range (6-8)	29%	30%	31%	31%	27%	29%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

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

Impact of Tourism on You & Your Family-

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?

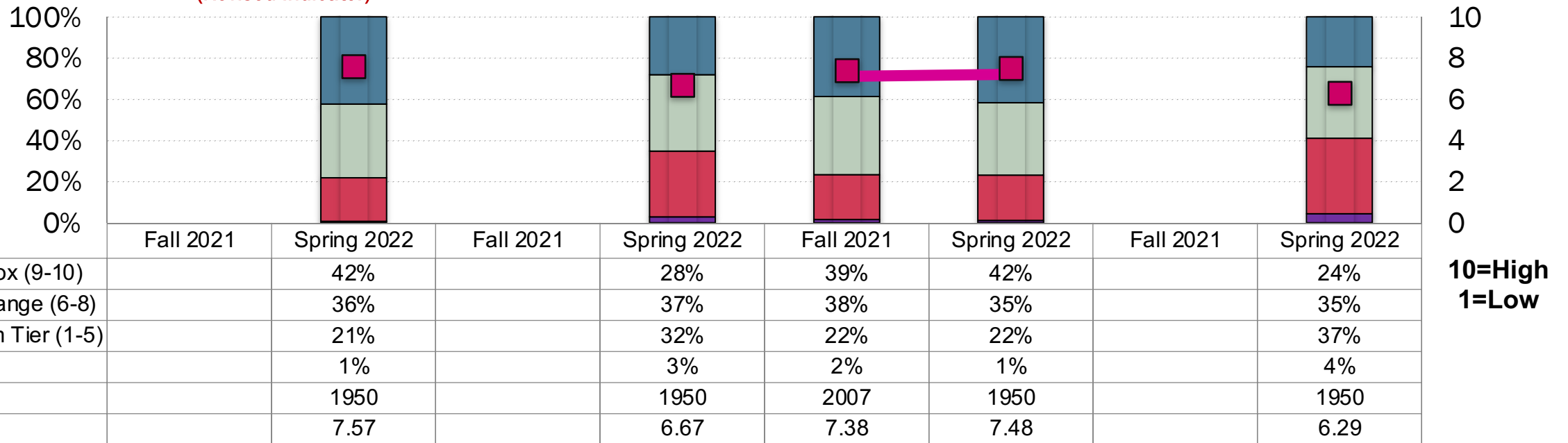
Economic Impact Indicators

Creates job opportunities for residents
(Revised Indicator)

Creates job opportunities with paths for advancement
(Revised Indicator)

Supports our local businesses like retail, dining, etc.

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

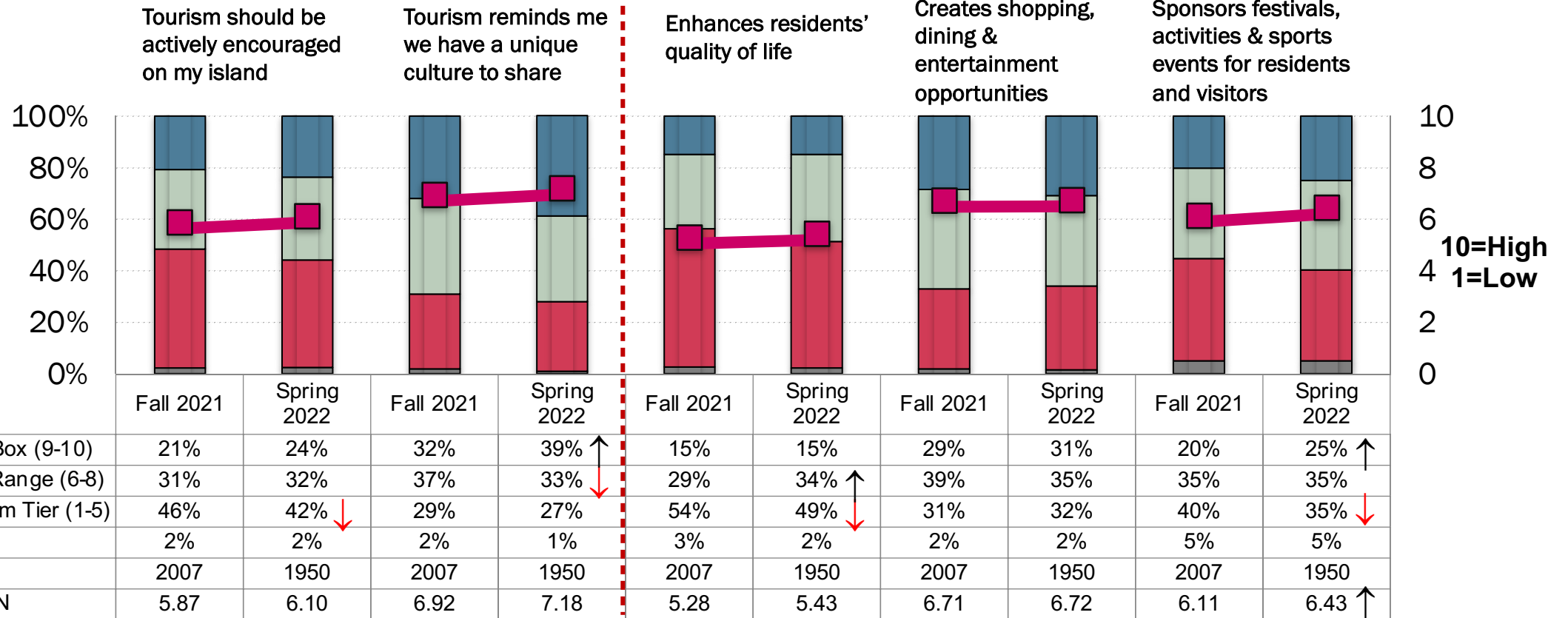


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Economic Impact (continued)/Quality of Life Indicators

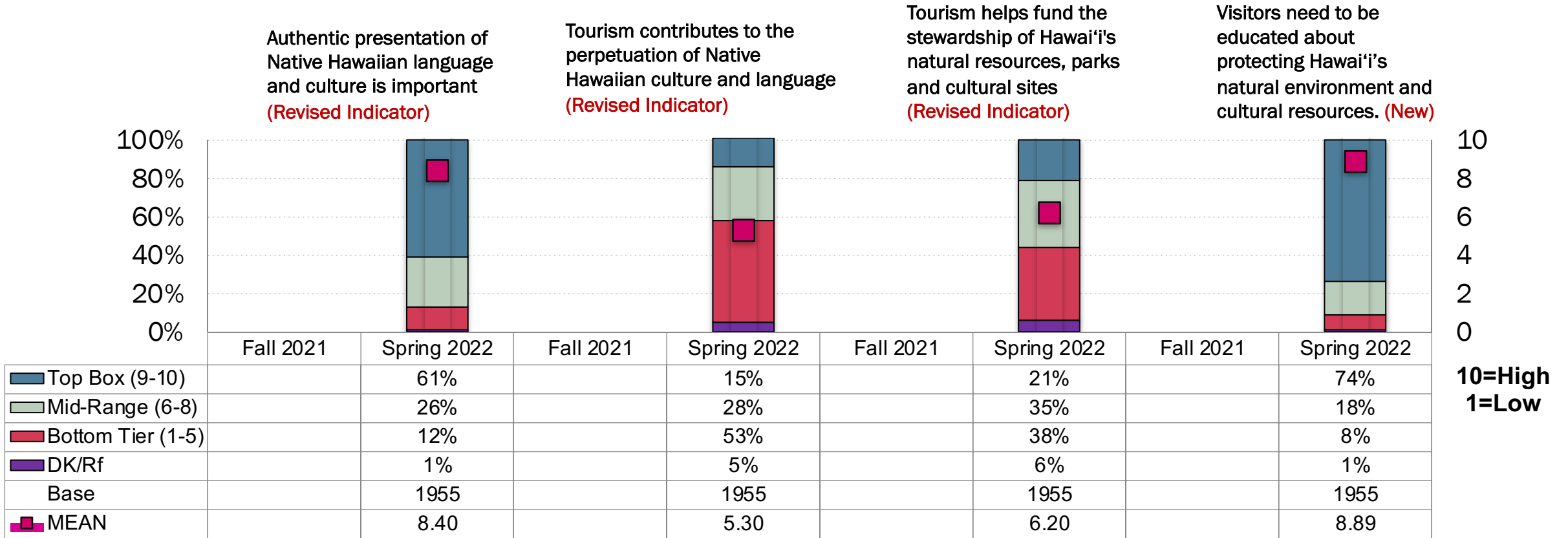
Economic Impact

Quality of Life



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

Native Hawaiian Cultural and Sustainability Indicators

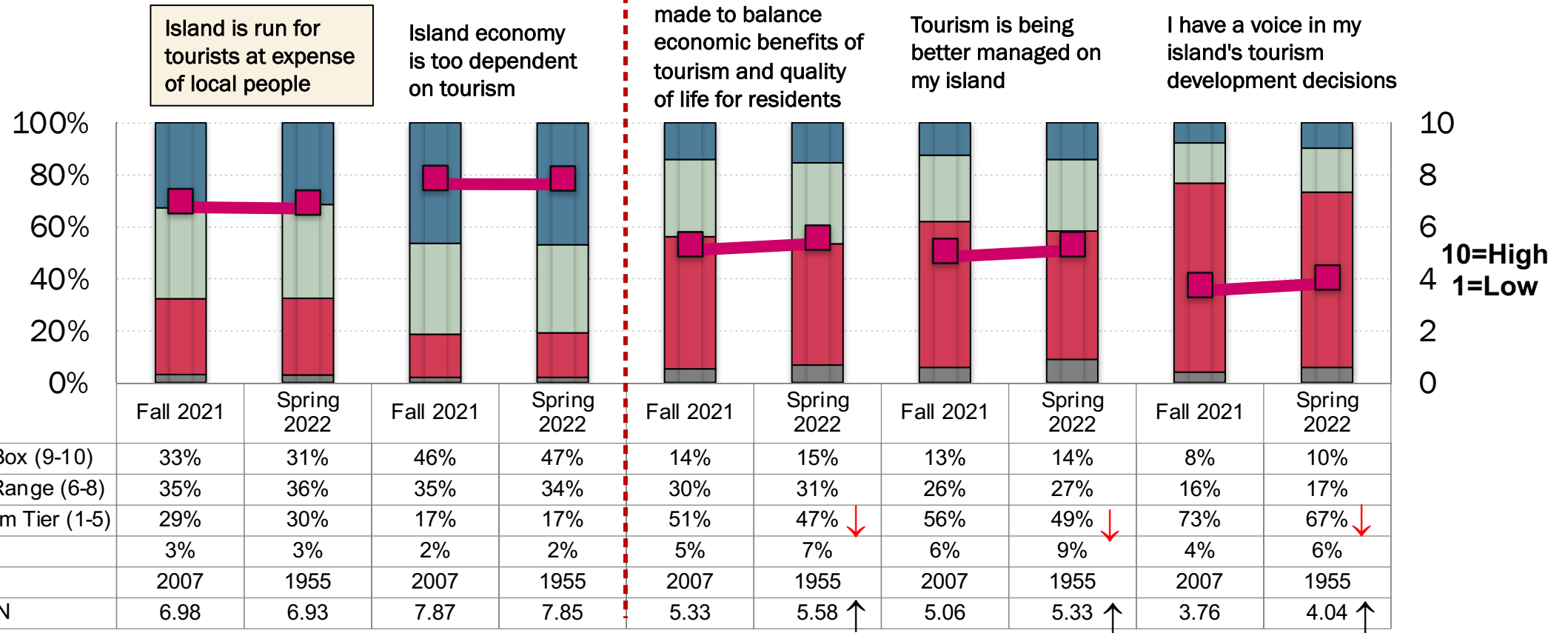


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Negative Impacts and Tourism Management Indicators

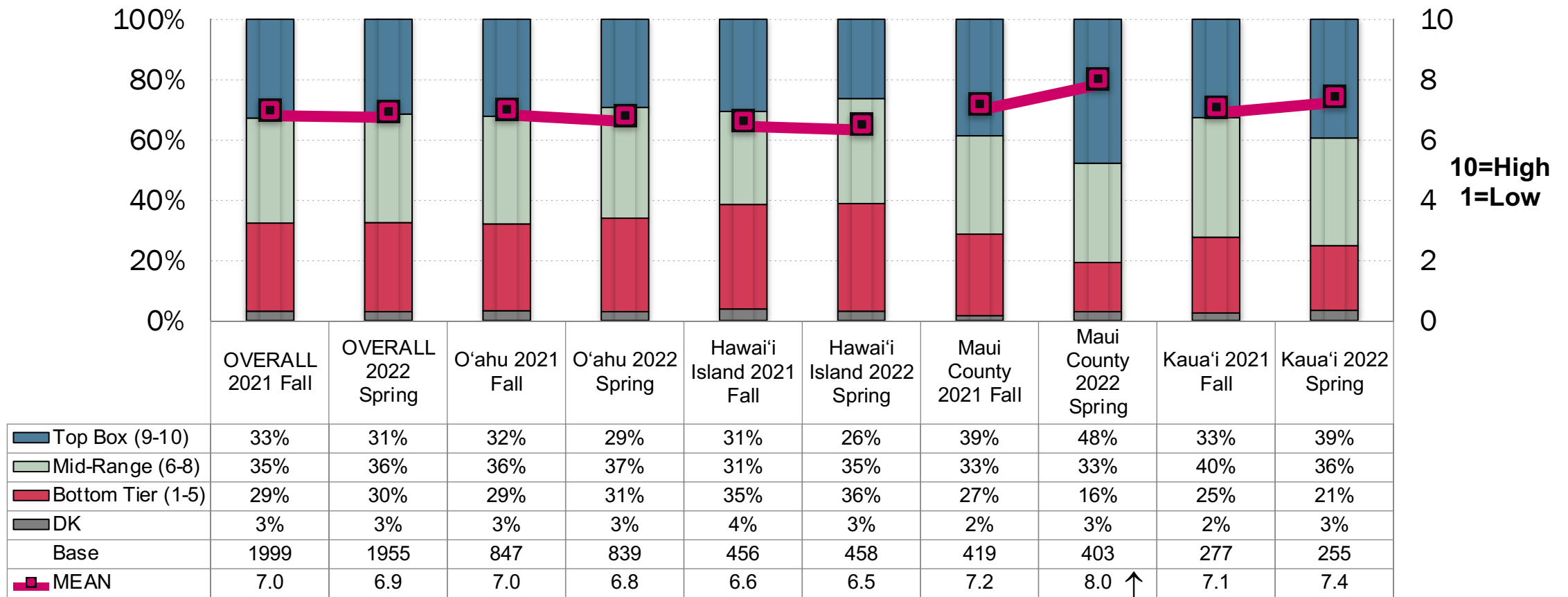
Negative Impacts

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.

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

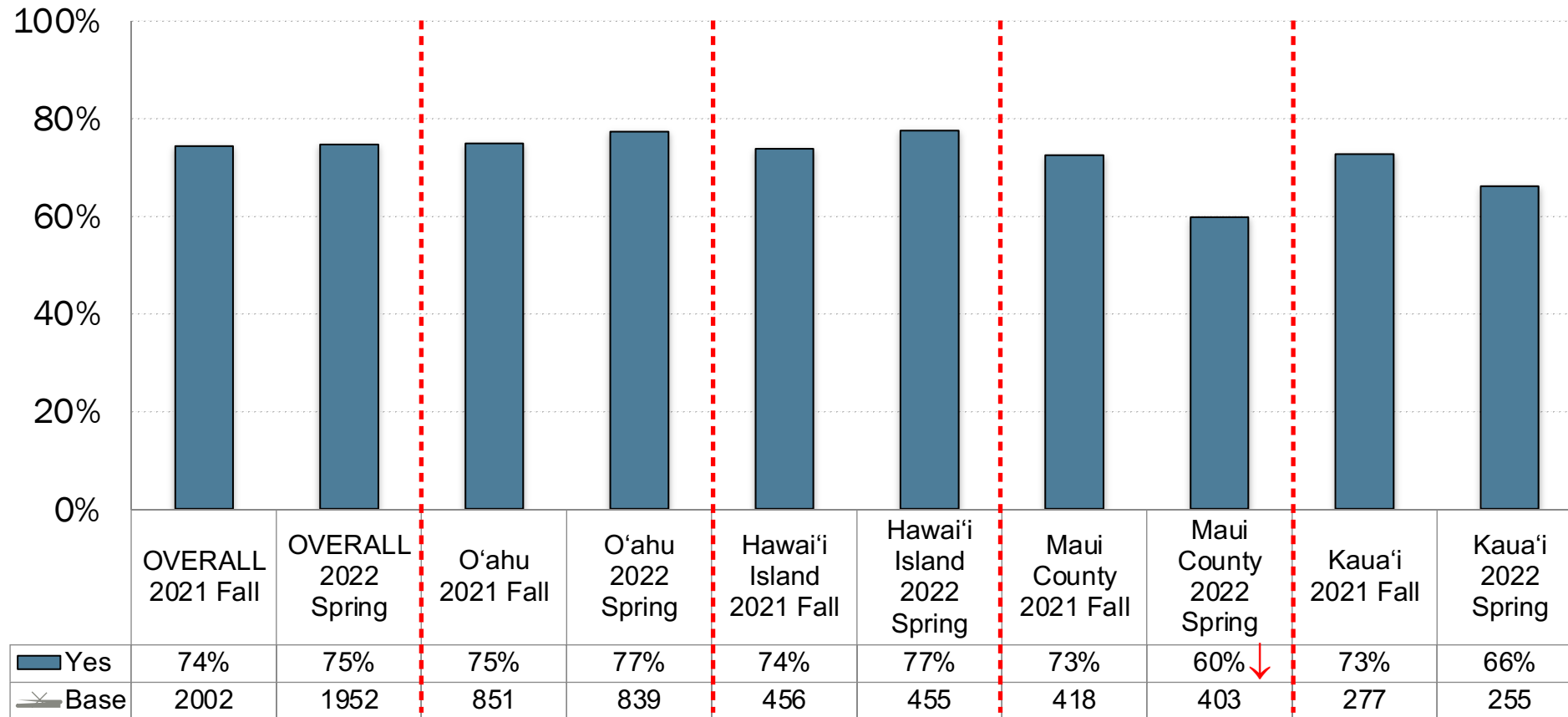


Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?



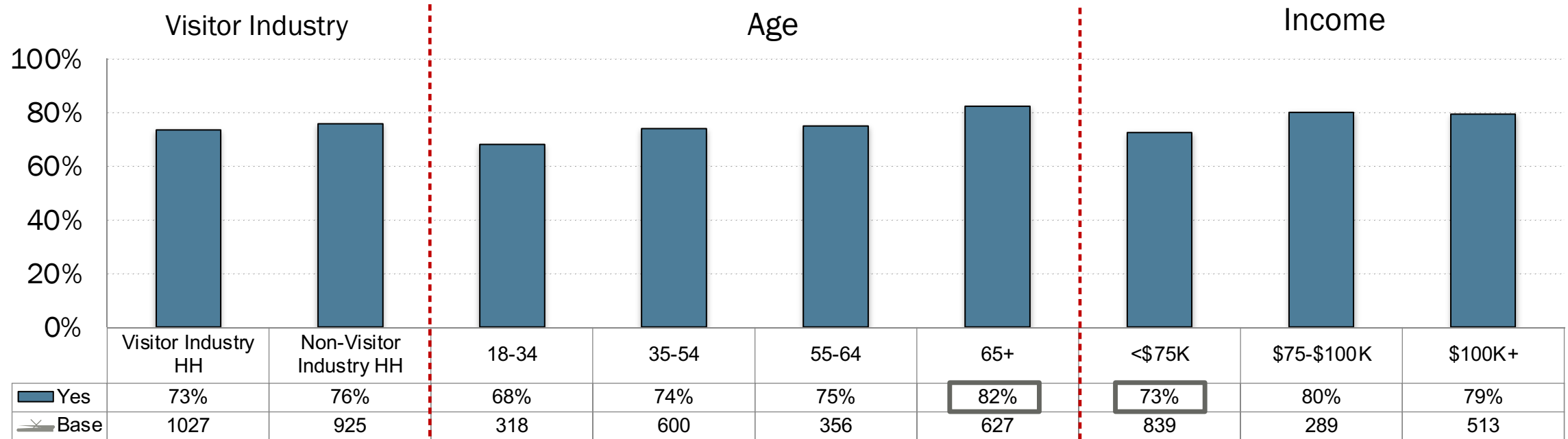
Appendix D: Is Tourism Worth the Issues Associated with it?

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



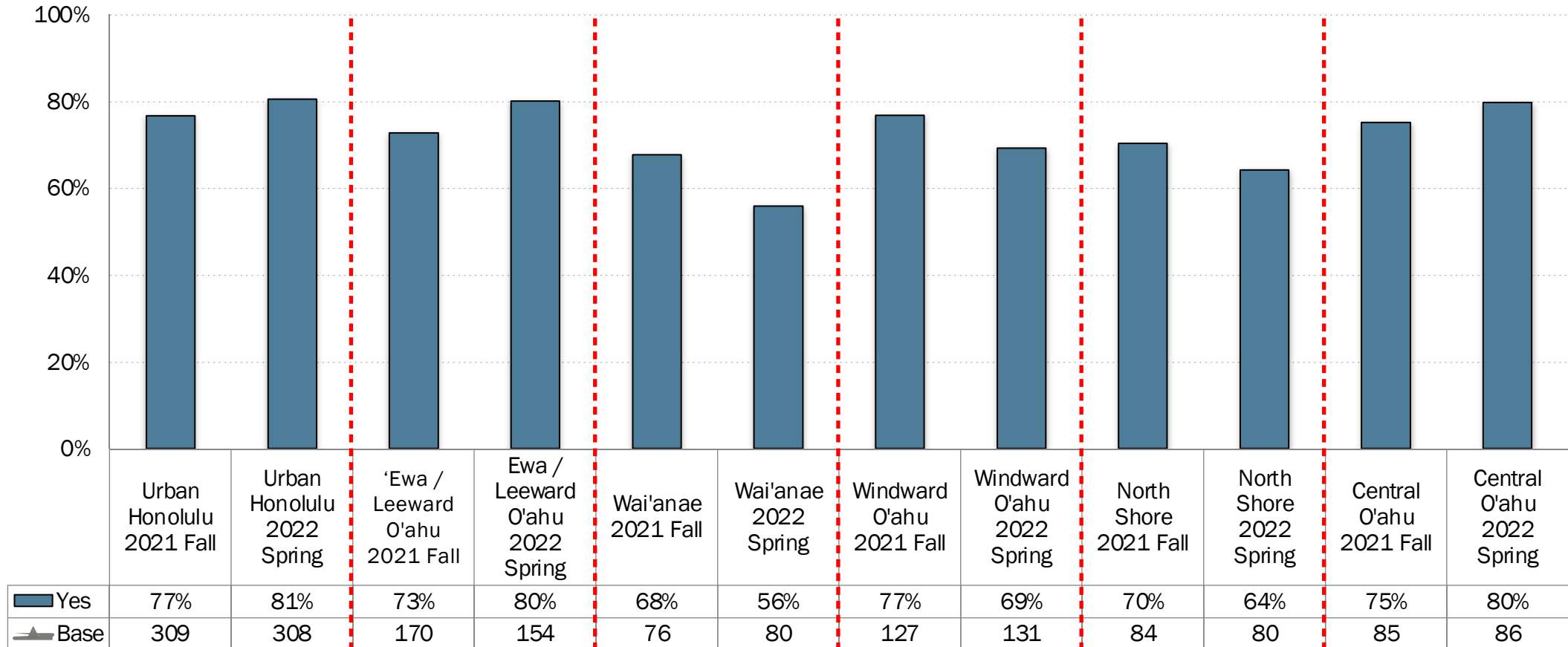
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



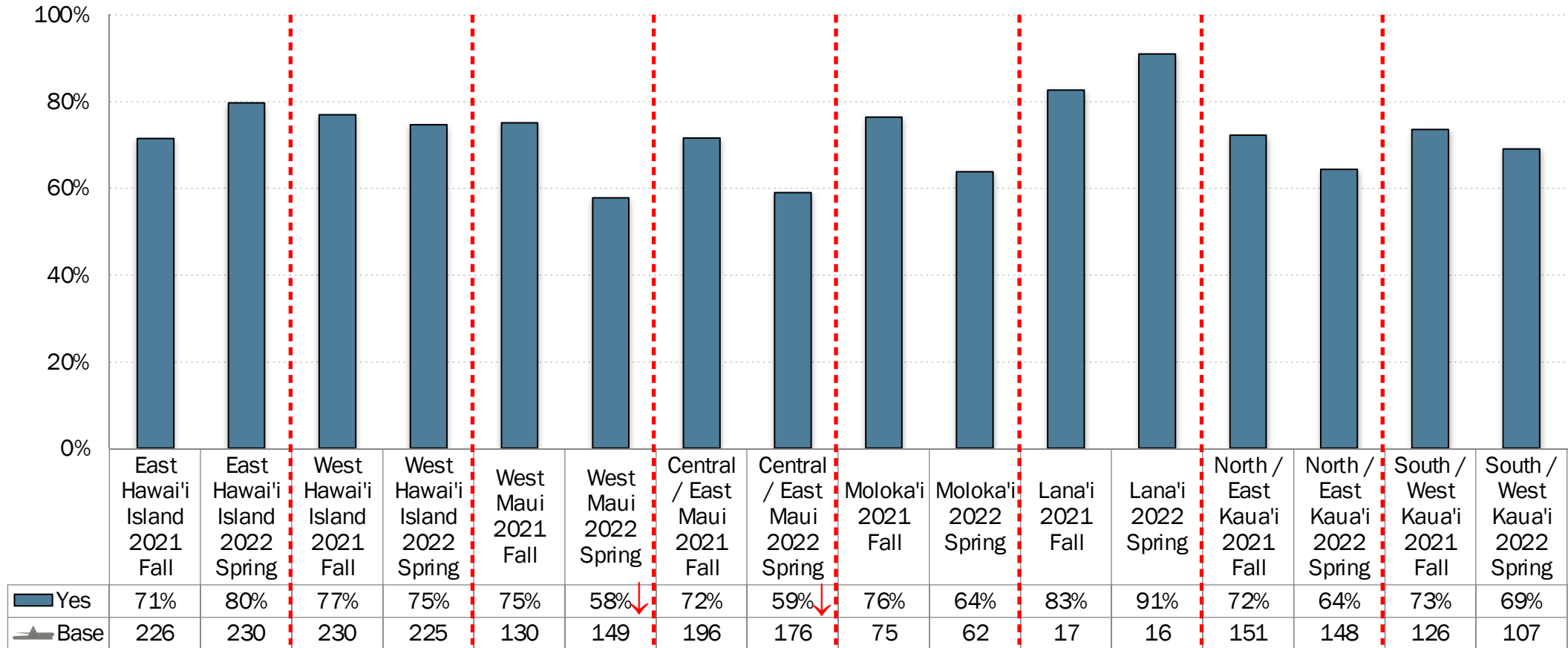
Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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



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

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



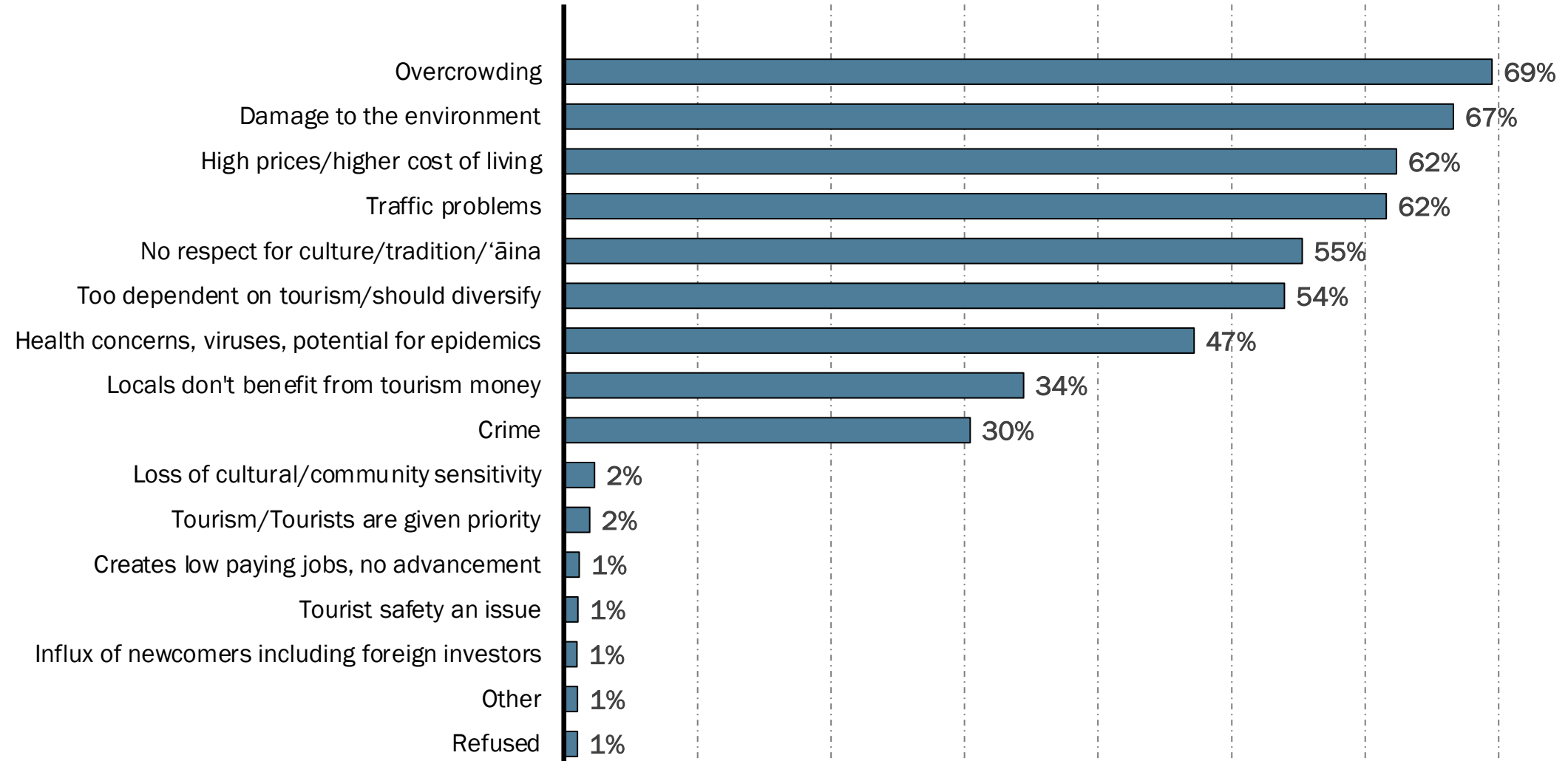
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?



Appendix E: Opportunities for Destination Management

Opportunities for destination management in Hawai'i (Spring 2022 only)

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

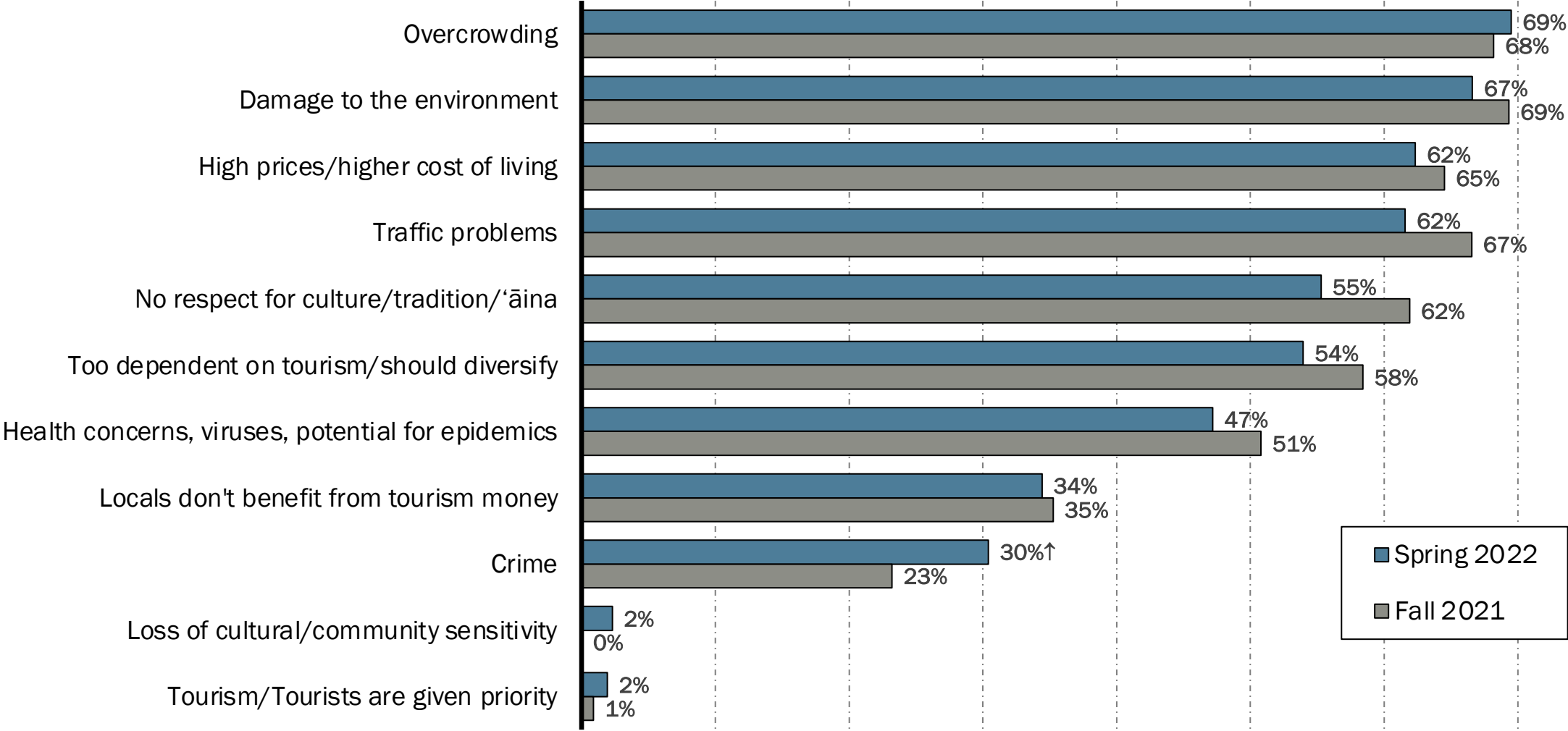


Base: 856

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

Opportunities for destination management in Hawai'i (Fall 2021 & Spring 2022)

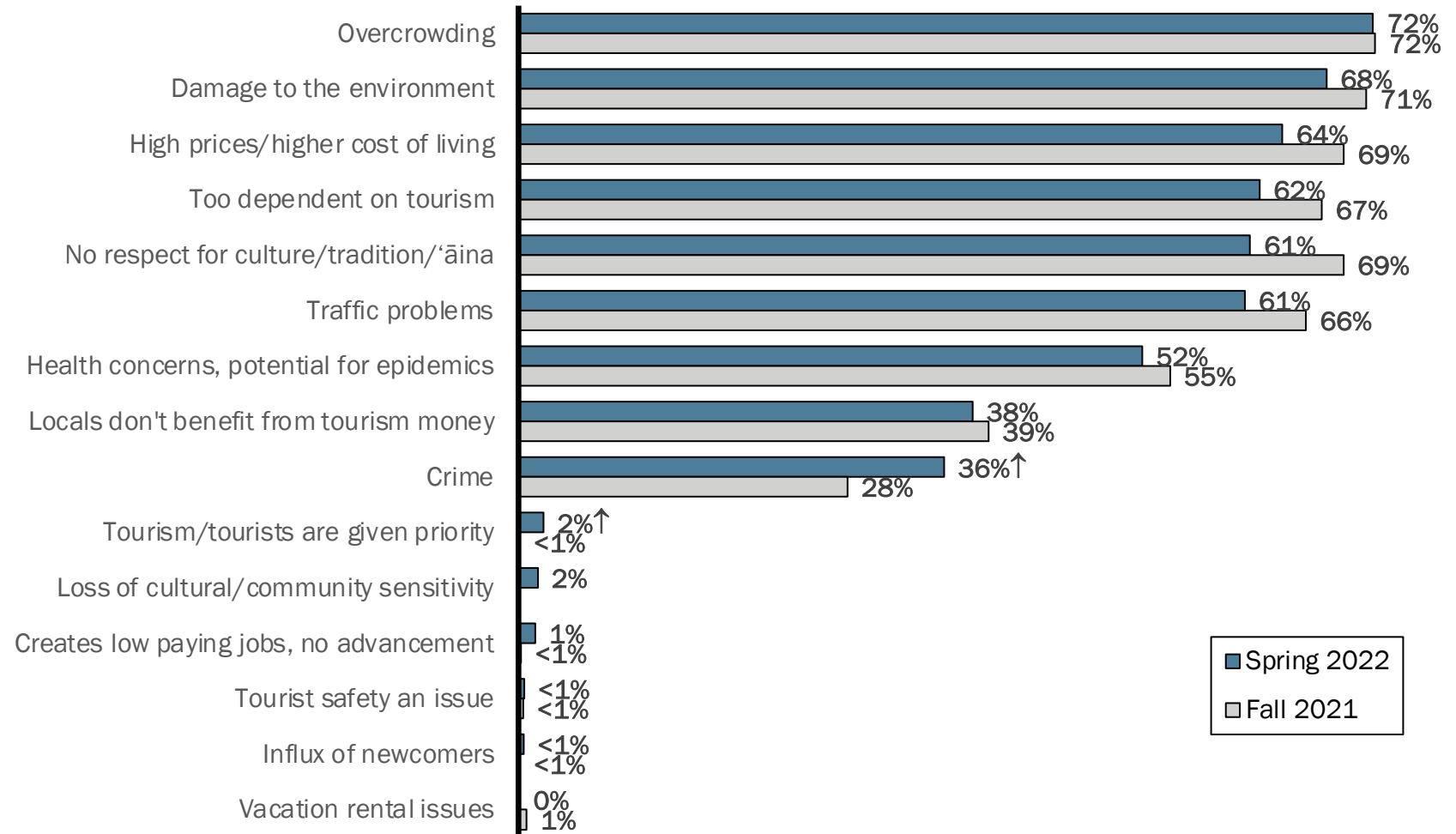
(According to residents saying Hawai'i tourism creates more **problems** than benefits)



Base: Spring 2022 (856), Fall 2021 (973)
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Opportunities for destination management in Hawai'i: O'ahu Residents

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

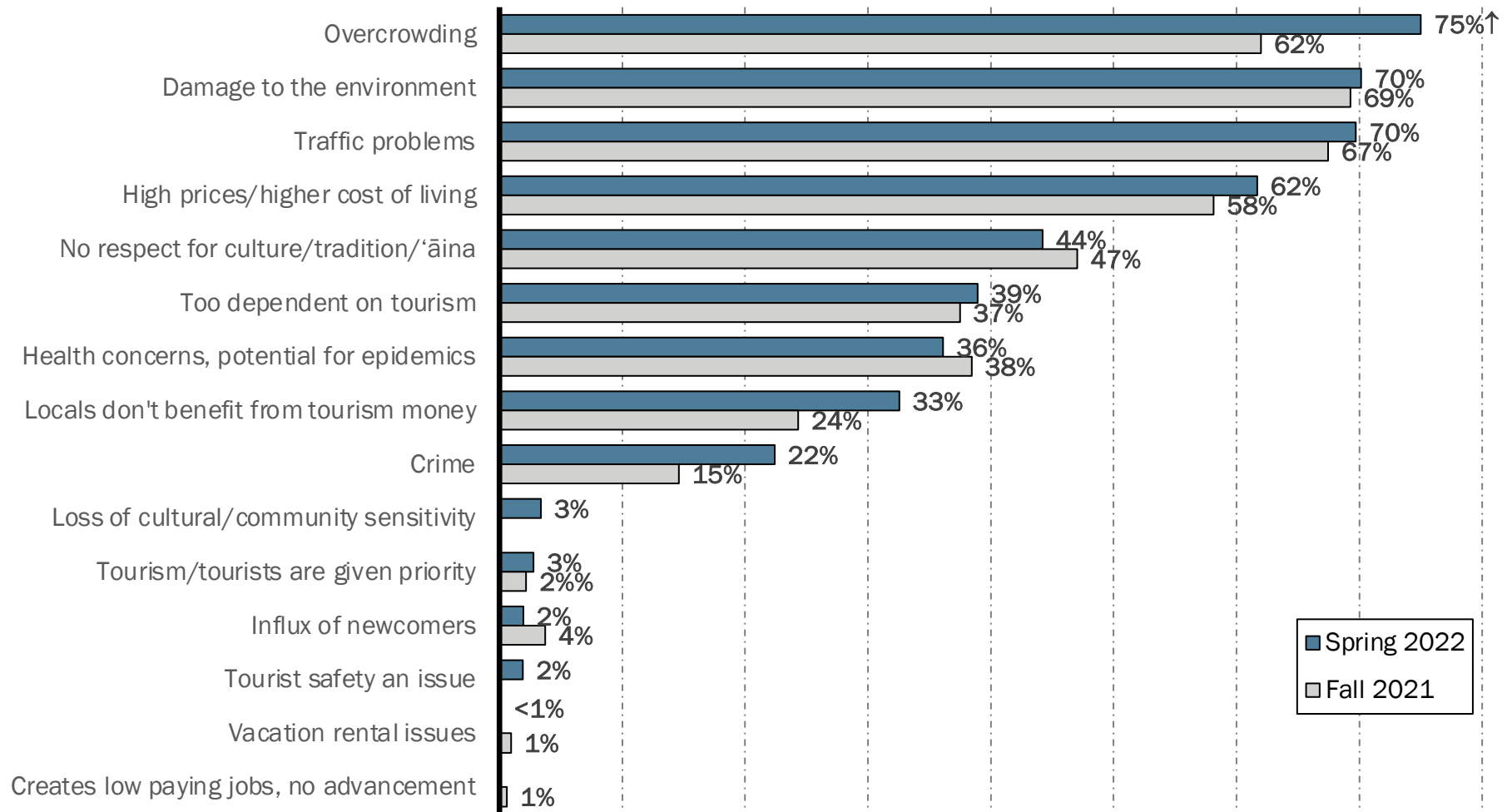


Base: Spring 2022 (354), Fall 2021 (400)

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

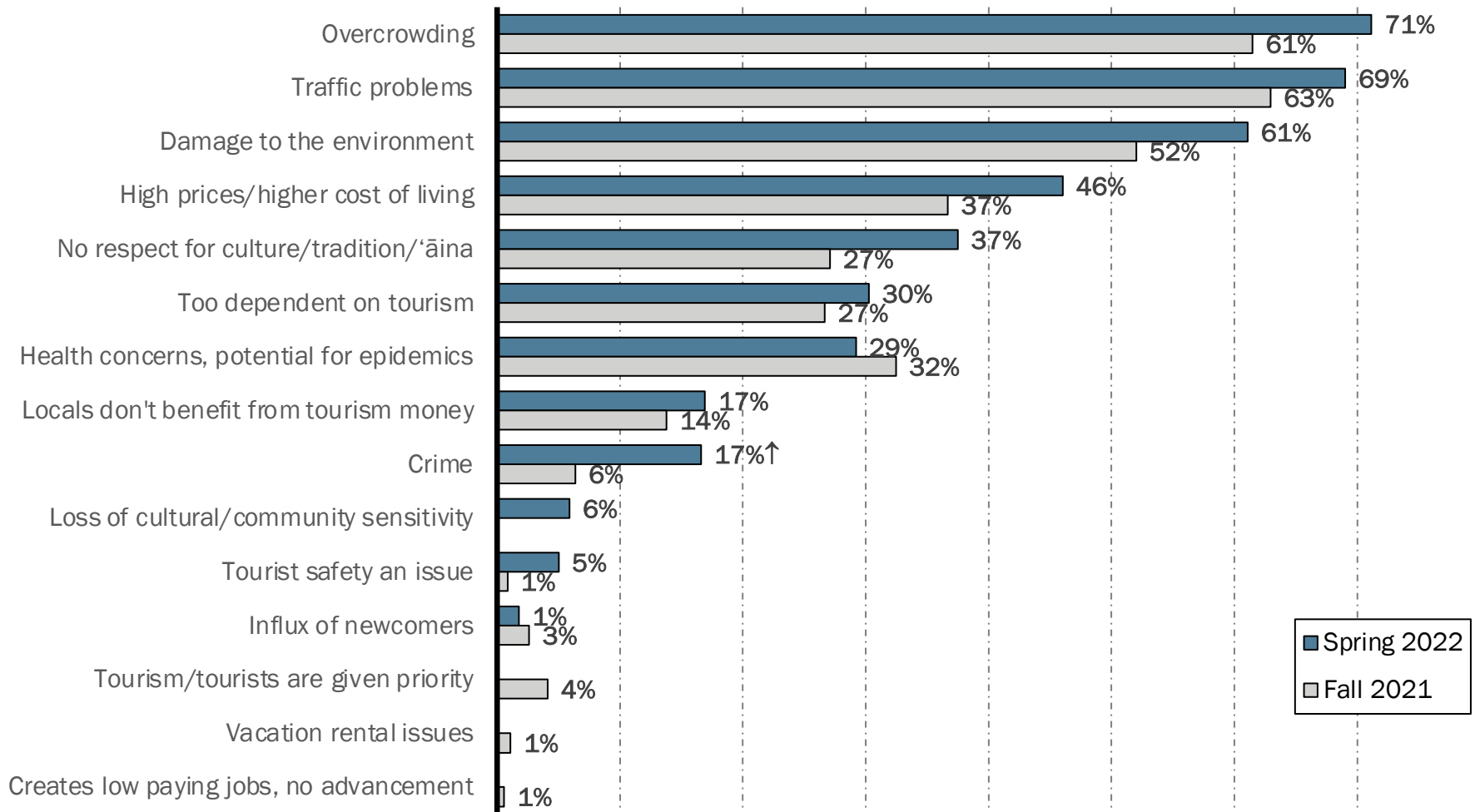
Opportunities for destination management in Hawai'i: Maui County Residents

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



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

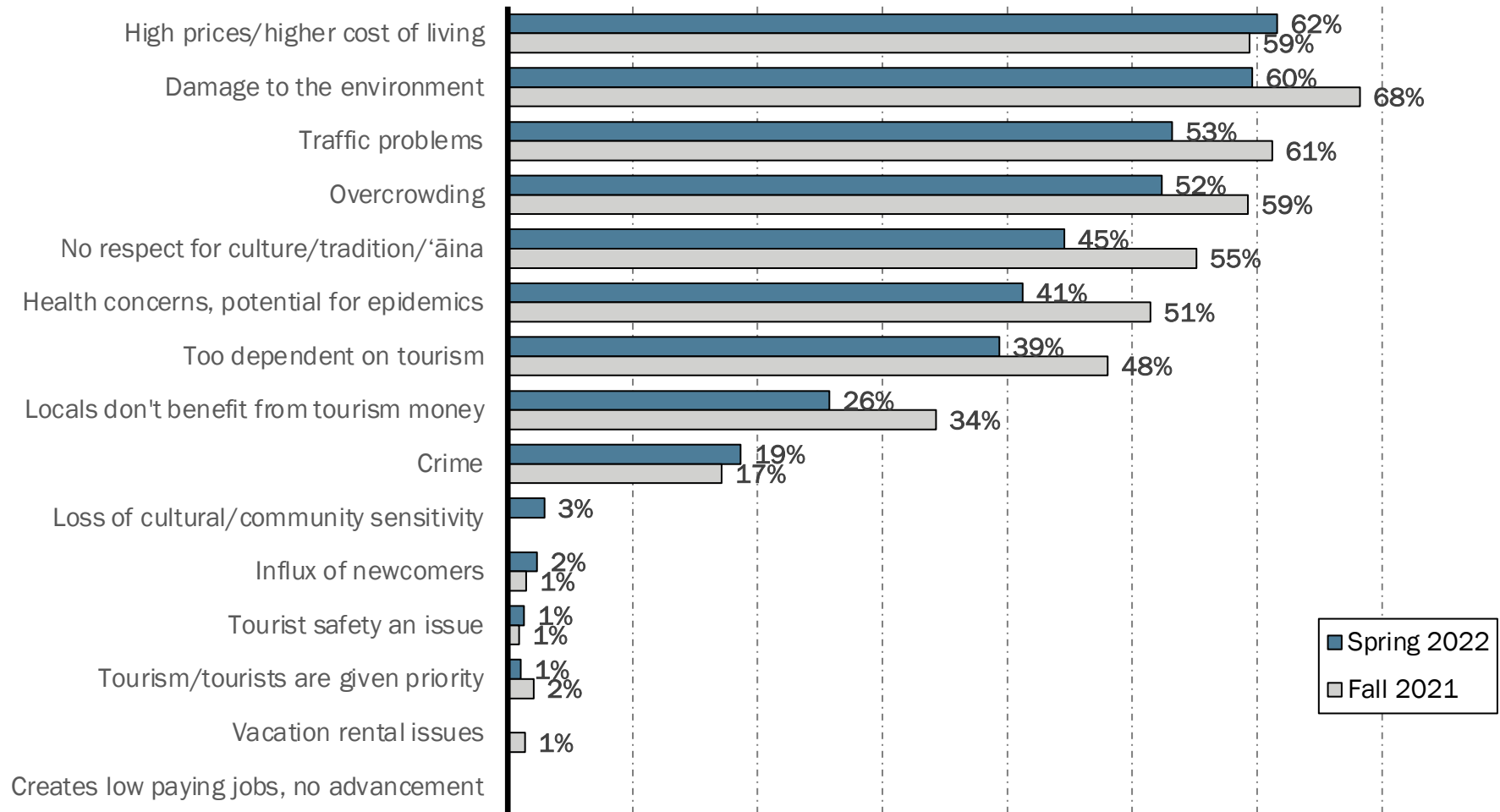
Opportunities for destination management in Hawai'i: **Kaua'i Residents** (According to residents saying Hawai'i tourism creates more problems than benefits)



Base: Spring 2022 (125), Fall 2021 (148)
Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Opportunities for destination management in Hawai'i: **Hawai'i Island Residents**

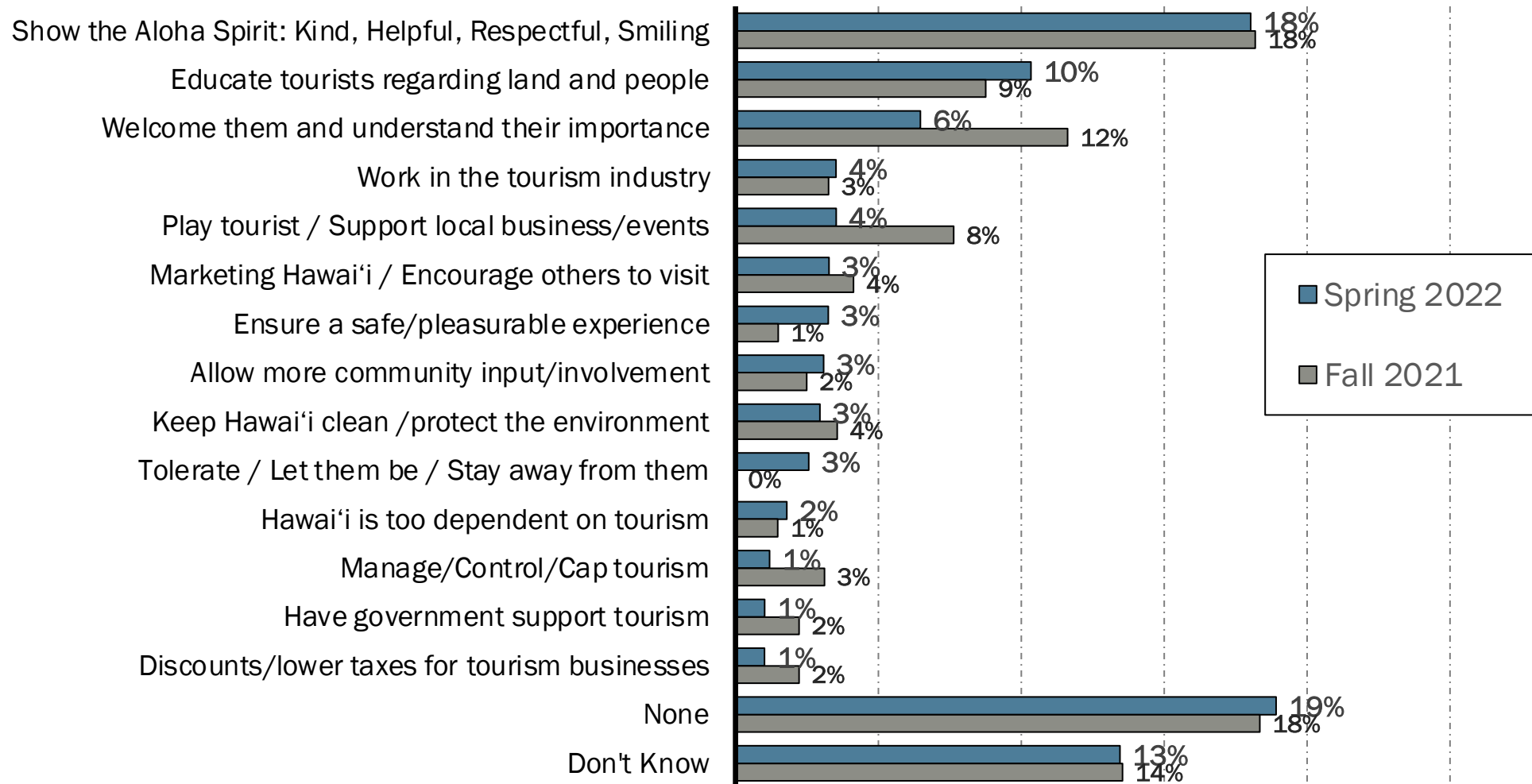
(According to residents saying Hawai'i tourism creates more problems than benefits)



Base: Spring 2022 (190), Fall 2021 (209)
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

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

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



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

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



Mahalo from the Omnitrak Group!