

HTA Resident Sentiment Survey 2017 Highlights

Prepared for Hawai'i Tourism Authority
July 2018
Field Dates: October 13, 2017 to January 16, 2018



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Research Objectives

- Resident sentiment toward Hawai'i's tourism industry is vital to maintaining sustainable growth in the industry and in the state's economy overall.
- The primary objectives of the Resident Sentiment Survey research are:
 - To track **key resident attitudes** toward tourism in Hawai'i over time.
 - To identify perceived **positive and negative impacts** of the tourism industry on local residents.
 - To identify for the tourism industry and HTA, **issues or concerns** regarding tourism expressed by residents.



Impact of Hawai'i
Tourism

General
Perceptions of
Hawai'i Tourism

What's the Big Idea?



With the visitor industry well on its way to its sixth consecutive year of record visitor arrivals (i.e., during the time this survey was fielded), **some indicators of Hawai'i Resident Sentiment had weakened, but none too deeply.**



*Having a **Voice in Tourism Development**, **Presenting Native Hawaiian Culture Authentically** and **Preserving Native Hawaiian Culture** are the keys to improving Resident Sentiment*



Overall, to improve Resident Sentiment, place increased focus on **Destination *Management, beyond Destination Marketing***

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 of Hawai'i Department of Business, Economic Development and Tourism. The telephone sample includes both landline (52%) and cellular (48%) phones.

Statewide sampling produced a total of $n = 1,614$ respondents as follows:

- O'ahu: 614
- Hawai'i Island: 480
- Maui County: 320
- Kaua'i: 200

Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interviews (CATI) and online surveys. Just under two-thirds (62%) of the respondents completed the survey via telephone and the remainder (38%) completed the survey online.
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: October 13, 2017 to January 16, 2018

Impact of Hawai'i Tourism – Mixed Results

Relatively steady

Perception of tourism industry in Hawai'i - Favorability

Slight decrease

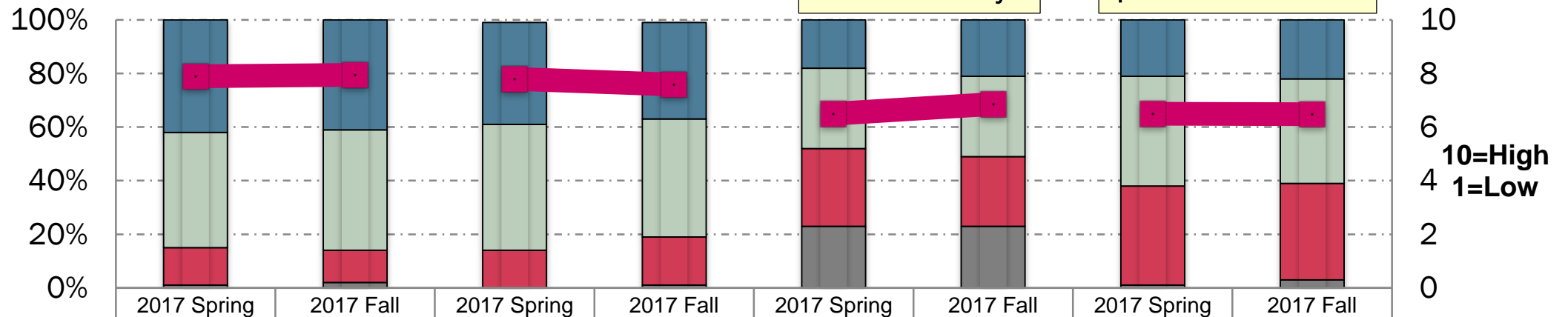
Perceived impact of tourism on the State

Notable increase

Perceived impact of tourism on You and Your Family*

Slight decrease

Tourism has brought more benefits than problems



	2017 Spring	2017 Fall	2017 Spring	2017 Fall	2017 Spring	2017 Fall	2017 Spring	2017 Fall
Top Box (9-10)	42%	41%	38%	36%	18%	21%	21%	22%
Mid-Range (6-8)	43%	45%	47%	44%	30%	30%	41%	39%
Bottom Tier (1-5)	14%	12%	14%	18%	29%	26%	37%	36%
DK	1%	2%	0%	1%	23%	23%	1%	3%
Base	1,650	1,614	1,650	1,614	1,650	1,614	1,650	1,614
MEAN	7.90	7.95	7.80	7.59	6.50	6.86	6.50	6.48

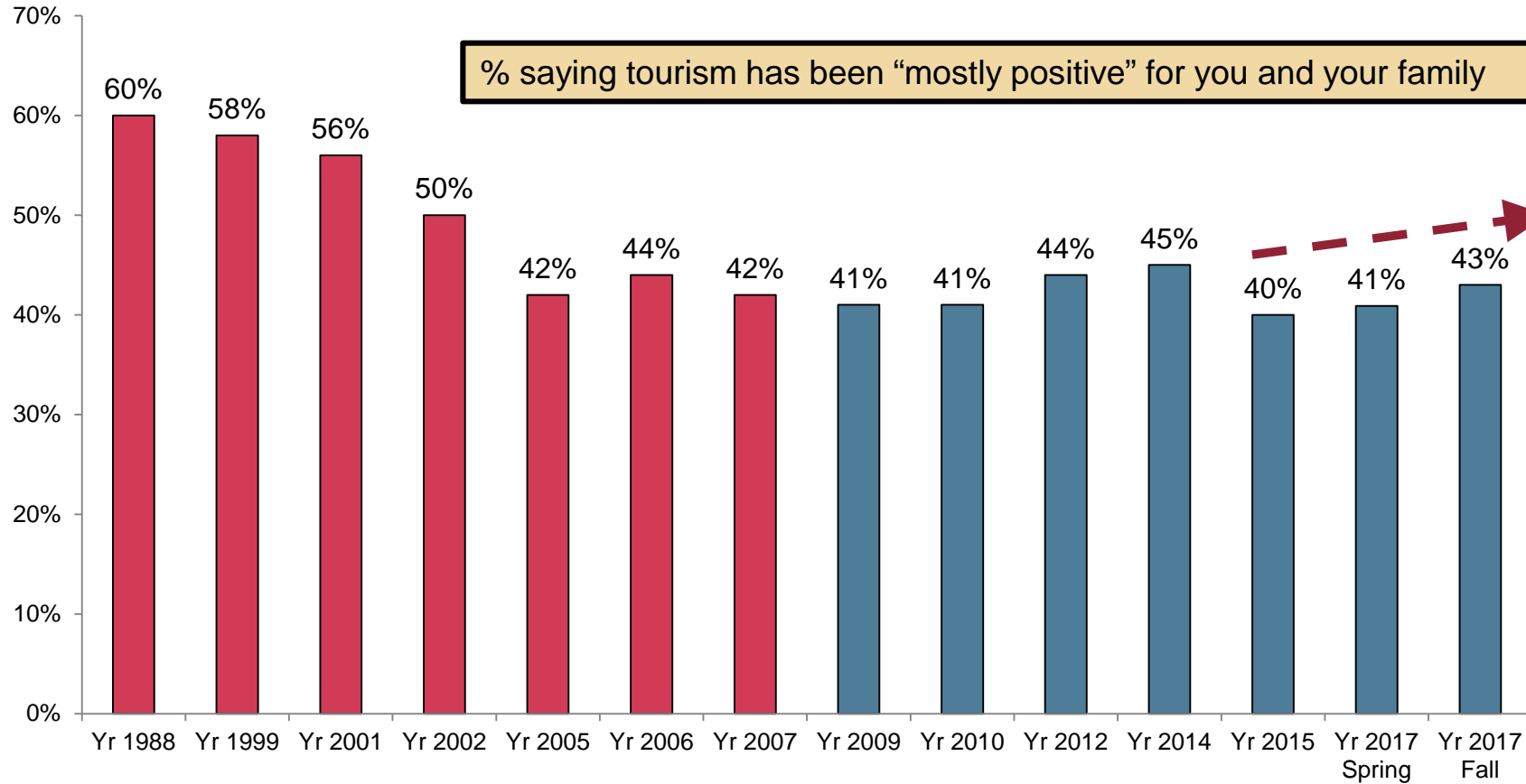
Q. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Q. 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?

*Note: Don't Know (DK) category for this question includes for "Don't know" and "No impact".

Q. 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.....?

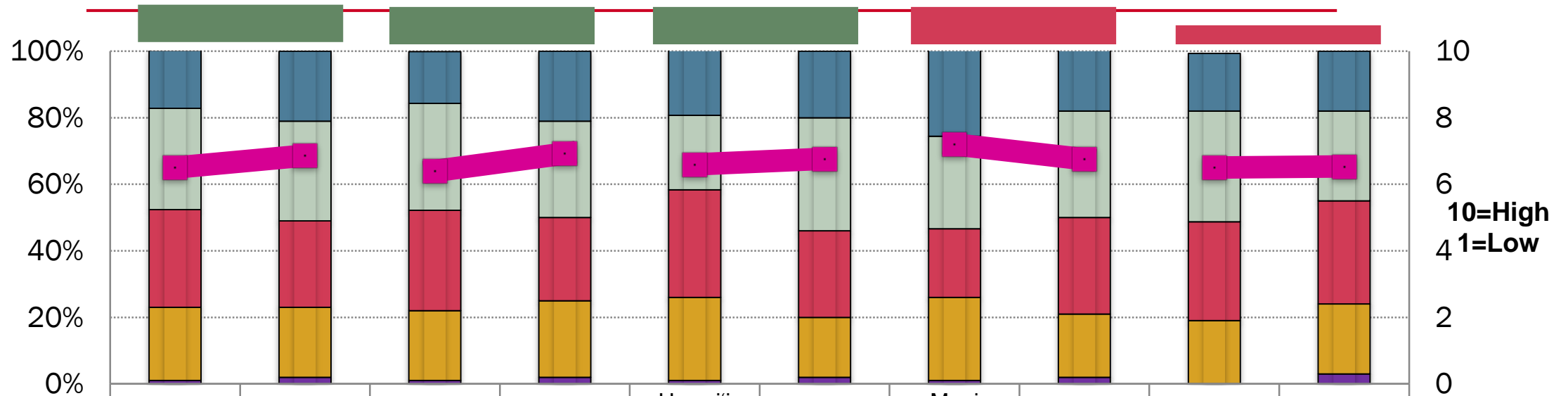
Impact of Tourism on You and Your Family - *Overall*



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?

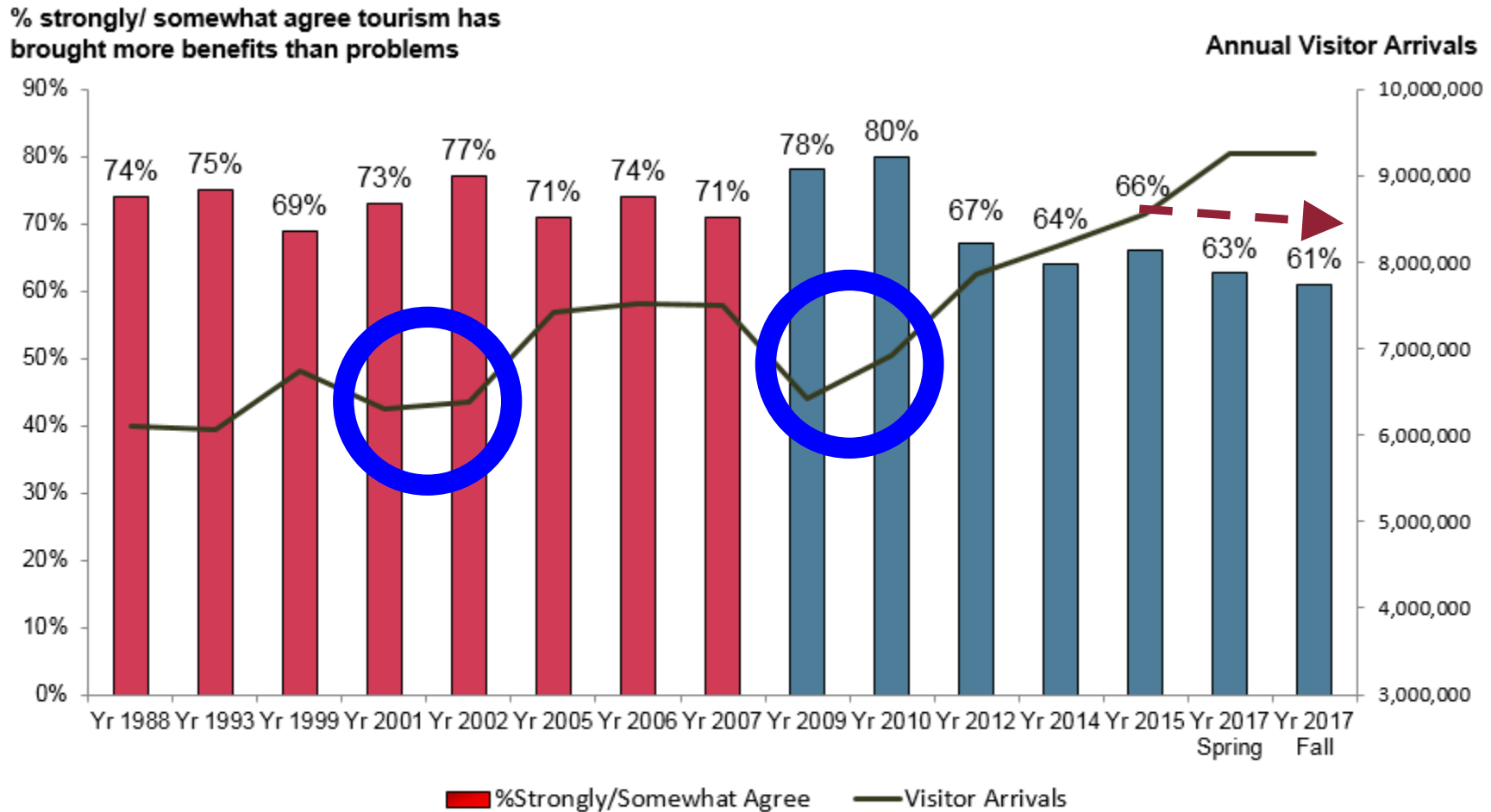
Impact of Tourism on You and Your Family - *By Island*



	OVERALL 2017 Spring	OVERALL 2017 Fall	O'ahu 2017 Spring	O'ahu 2017 Fall	Hawai'i Island 2017 Spring	Hawai'i Island 2017 Fall	Maui County 2017 Spring	Maui County 2017 Fall	Kaua'i 2017 Spring	Kaua'i 2017 Fall
Top Box (9-10)	18%	21%	16%	21%	20%	20%	27%	19%	17%	18%
Mid-Range (6-8)	30%	30%	32%	29%	22%	34%	28%	32%	33%	27%
Bottom Tier (1-5)	29%	26%	30%	25%	32%	26%	21%	29%	30%	31%
No Impact	22%	21%	21%	23%	25%	18%	25%	19%	19%	21%
DK/Rf	1%	2%	1%	2%	1%	2%	1%	2%	0%	3%
Base	1,650	1,614	600	614	450	480	400	320	200	200
MEAN	6.50	6.86	6.40	6.92	6.60	6.77	7.20	6.75	6.50	6.54

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?

Tourism has Brought more Benefits than Problems

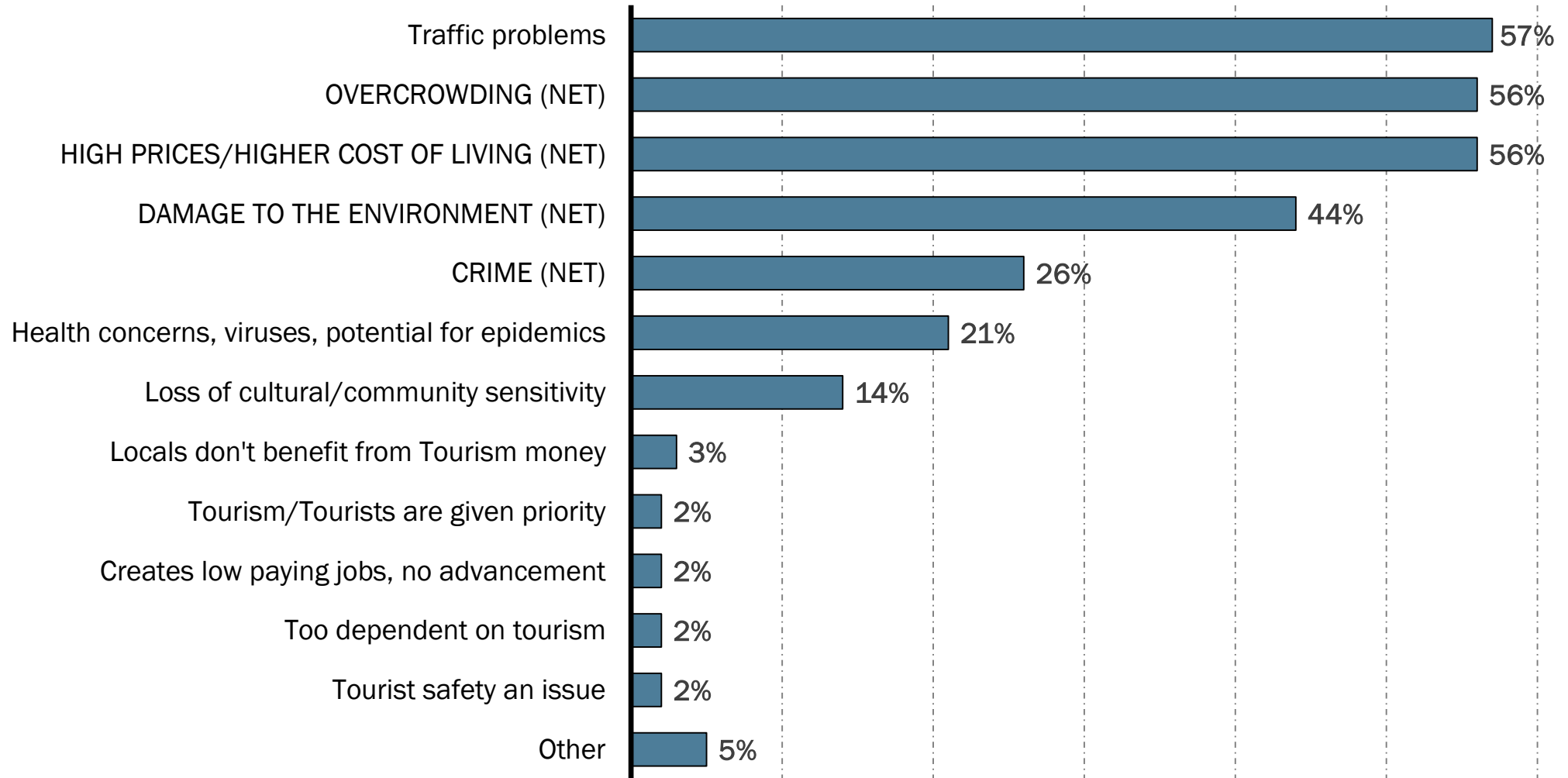


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q. 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

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



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

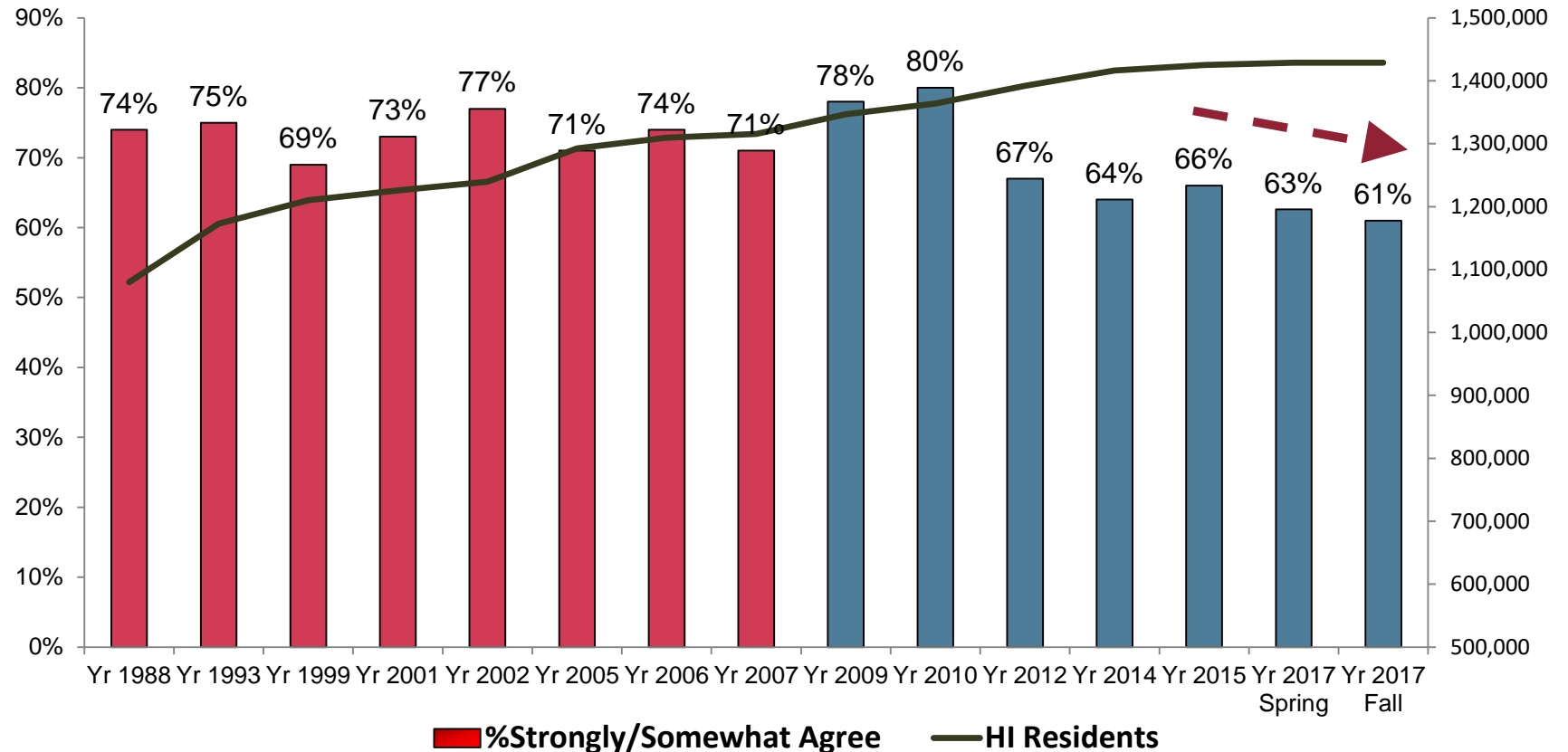
“Tourism has brought more benefits than problems” - *Overall*

Other Marketplace Considerations

- Hawai'i resident count has also been on the rise.
- Fueled by the Sharing Economy and Social Media, visitors are appearing in places they have not been in in the past

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

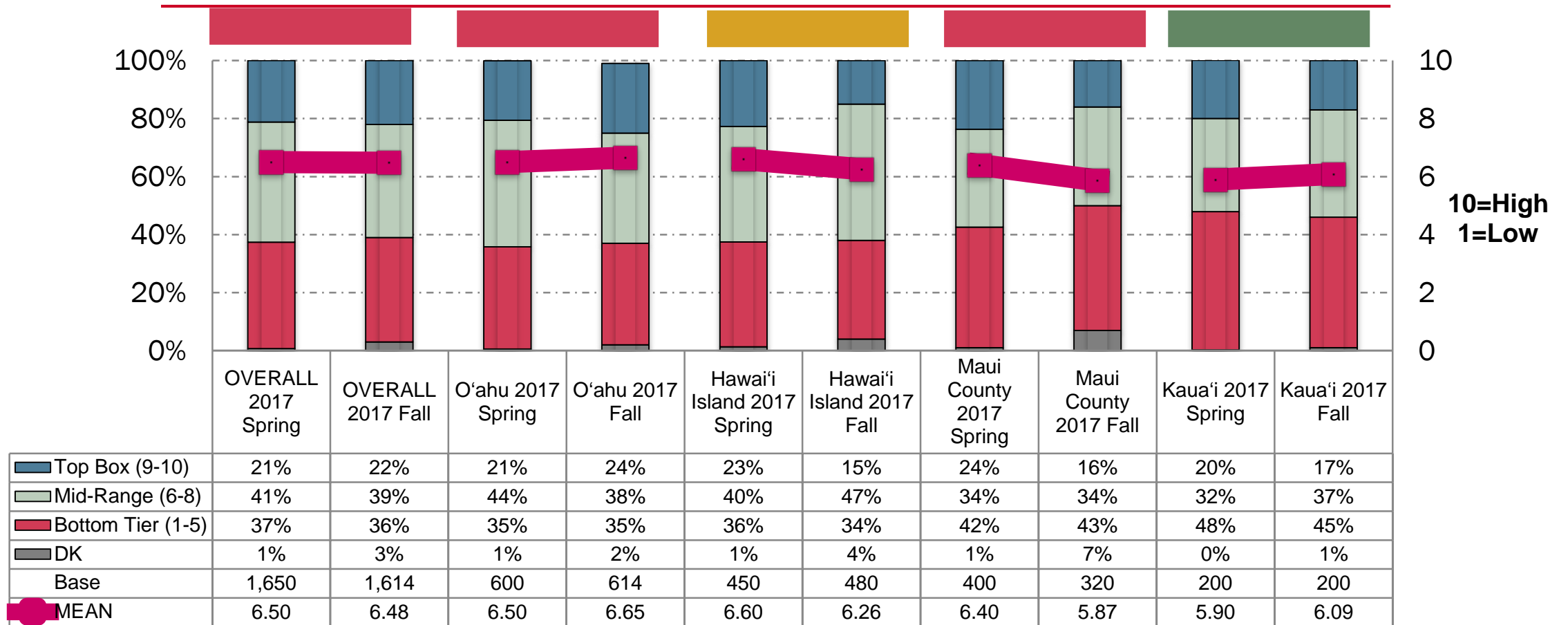
Hawai'i Resident Population



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

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

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



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

Impact of Hawai'i Tourism – Mixed Results

Relatively steady

Slight decrease

Notable rise

Notable decrease

Relatively steady

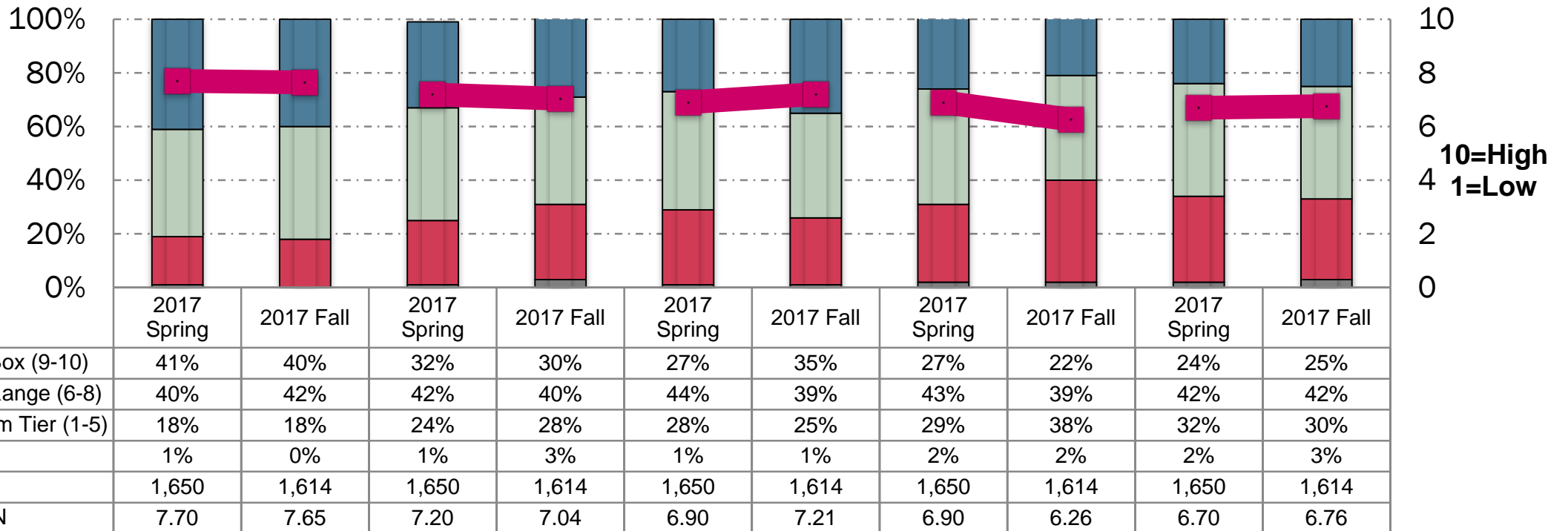
Creates shopping, restaurants & entertainment opportunities

Creates jobs that have opportunities for advancement

Creates many well-paying jobs for residents

Sponsors festivals, activities & sports events for residents and visitors

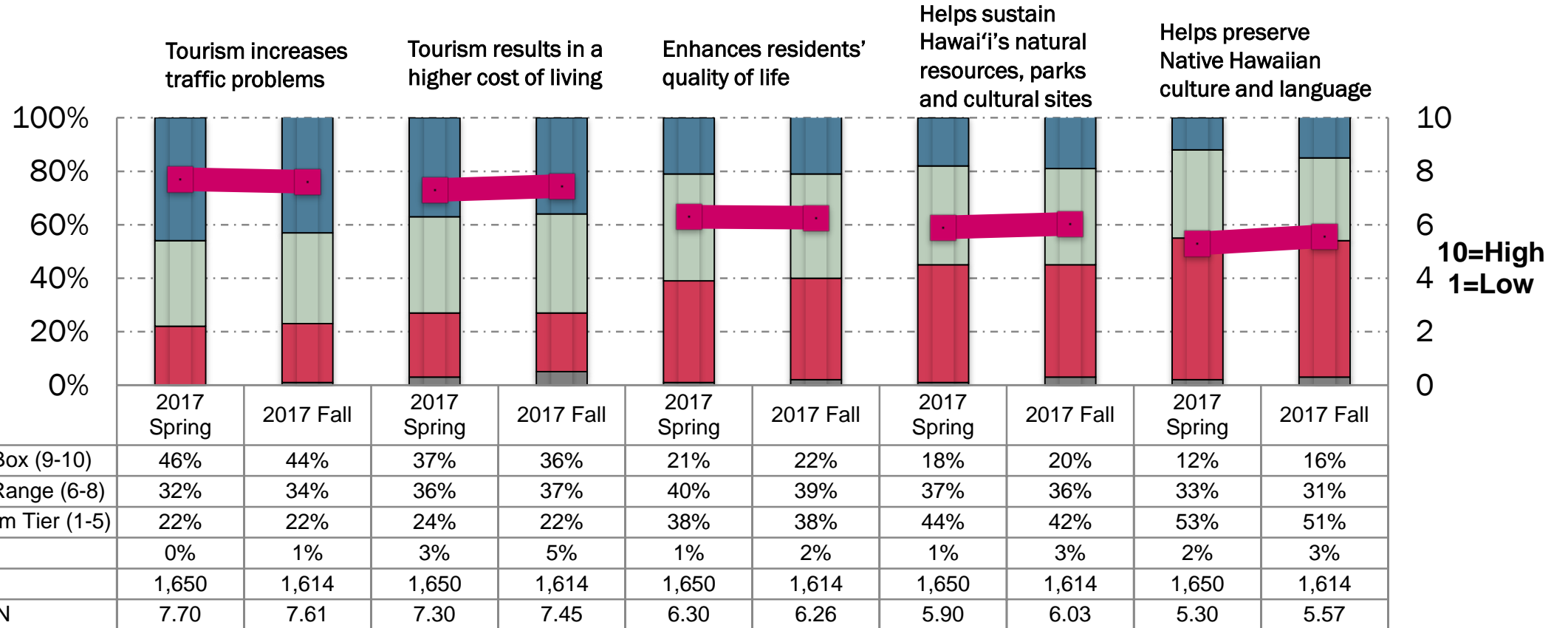
Provides opportunities for resident involvement



Q. 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?

Impact of Hawai'i Tourism – Mixed Results

Relatively steady Relatively steady Holding steady Relatively steady Notable increase



Q. 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?

General Perceptions of Hawai'i Tourism – Pivot from Promotion

Notable decrease

Holding steady

Slight decrease

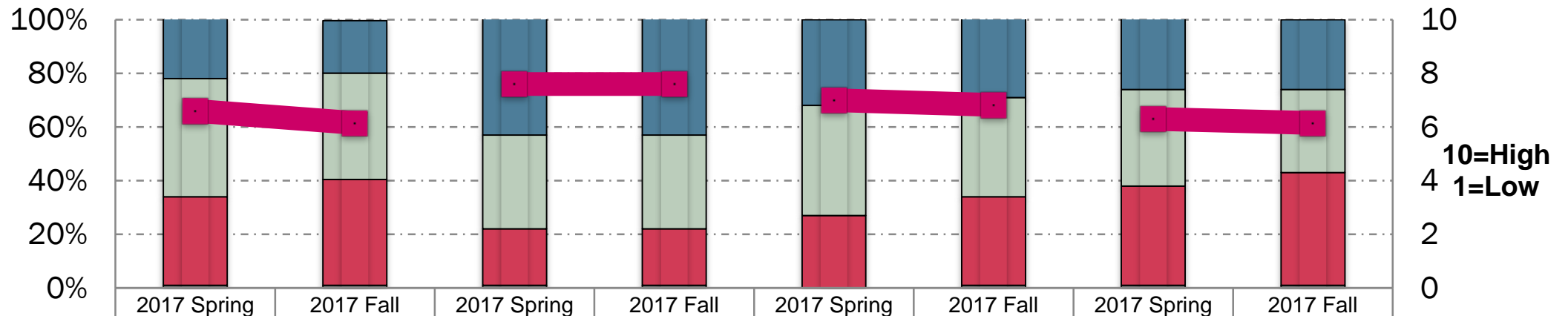
Slight decrease

Funds should be spent to promote tourism in Hawai'i

Tourism reminds me we have a unique culture to share

Tourism should be actively encouraged on my island

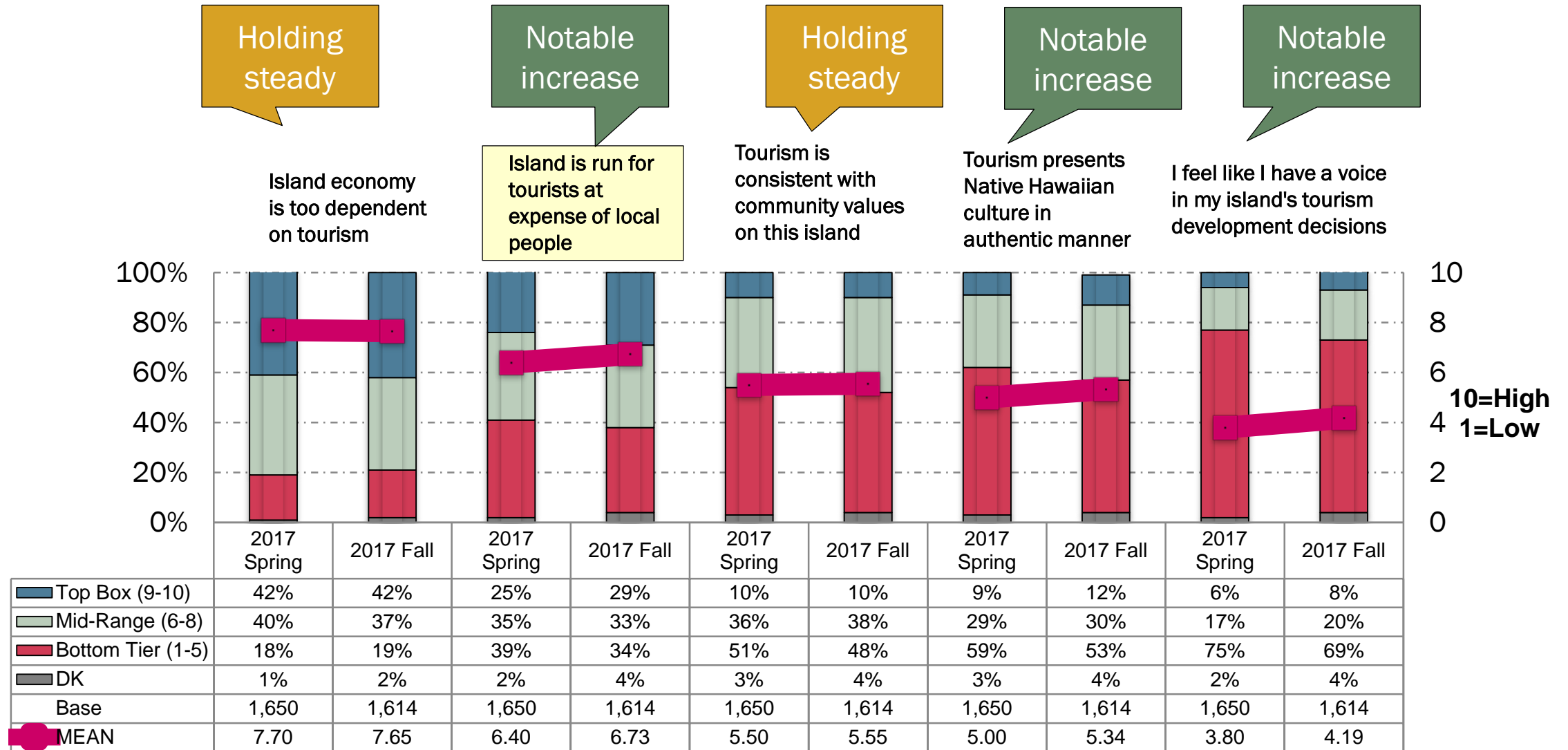
Tourism makes me feel special because people travel to see my island's unique features



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Bottom Tier (1-5)	33%	39%	21%	21%	27%	33%	37%	42%
DK	1%	1%	1%	1%	0%	1%	1%	1%
Base	1,650	1,614	1,650	1,614	1,650	1,614	1,650	1,614
MEAN	6.60	6.15	7.60	7.60	7.00	6.82	6.30	6.15

Q. 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 ...

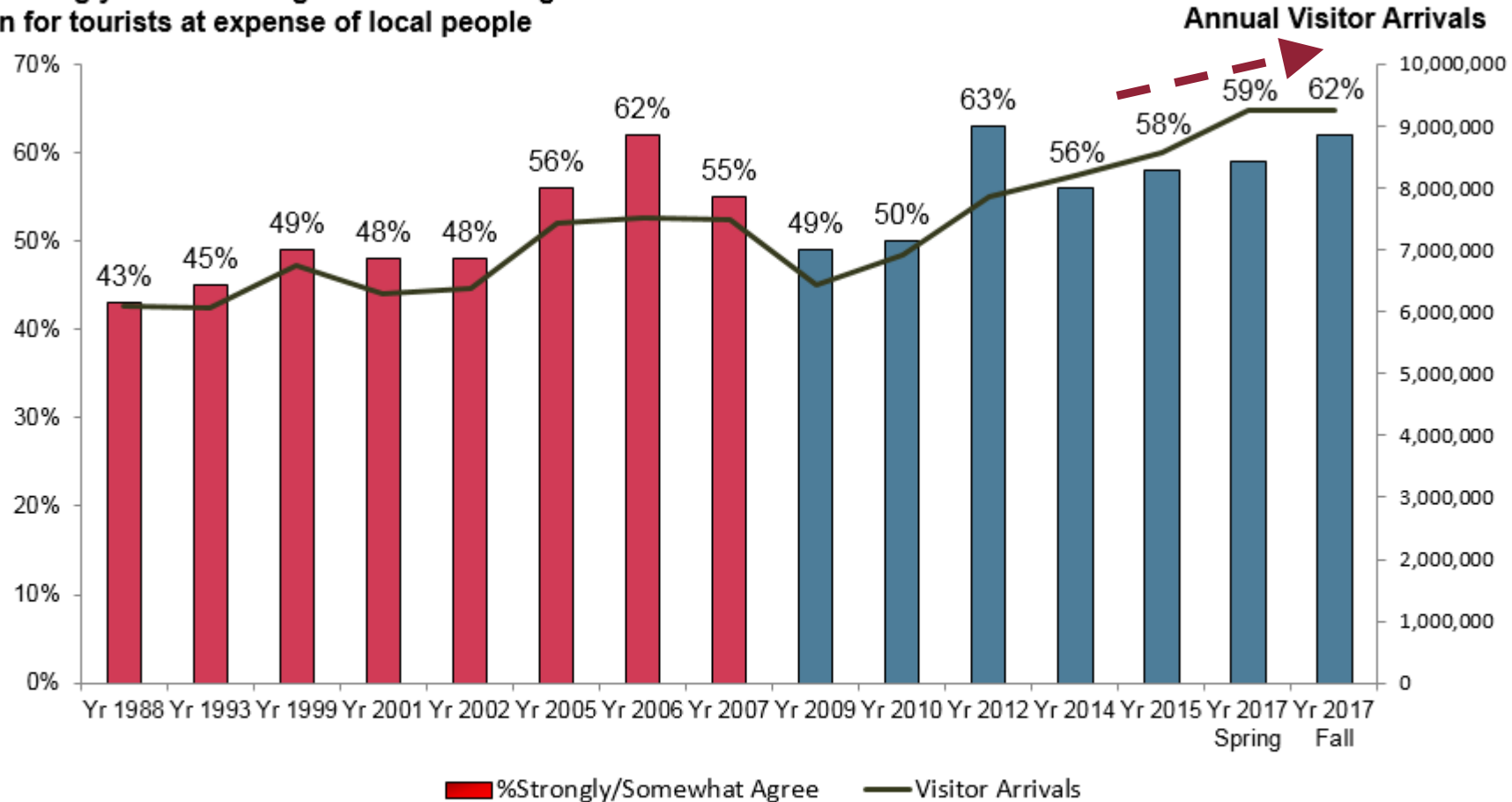
General Perceptions of Hawai'i Tourism – Mixed Results



Q. 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”

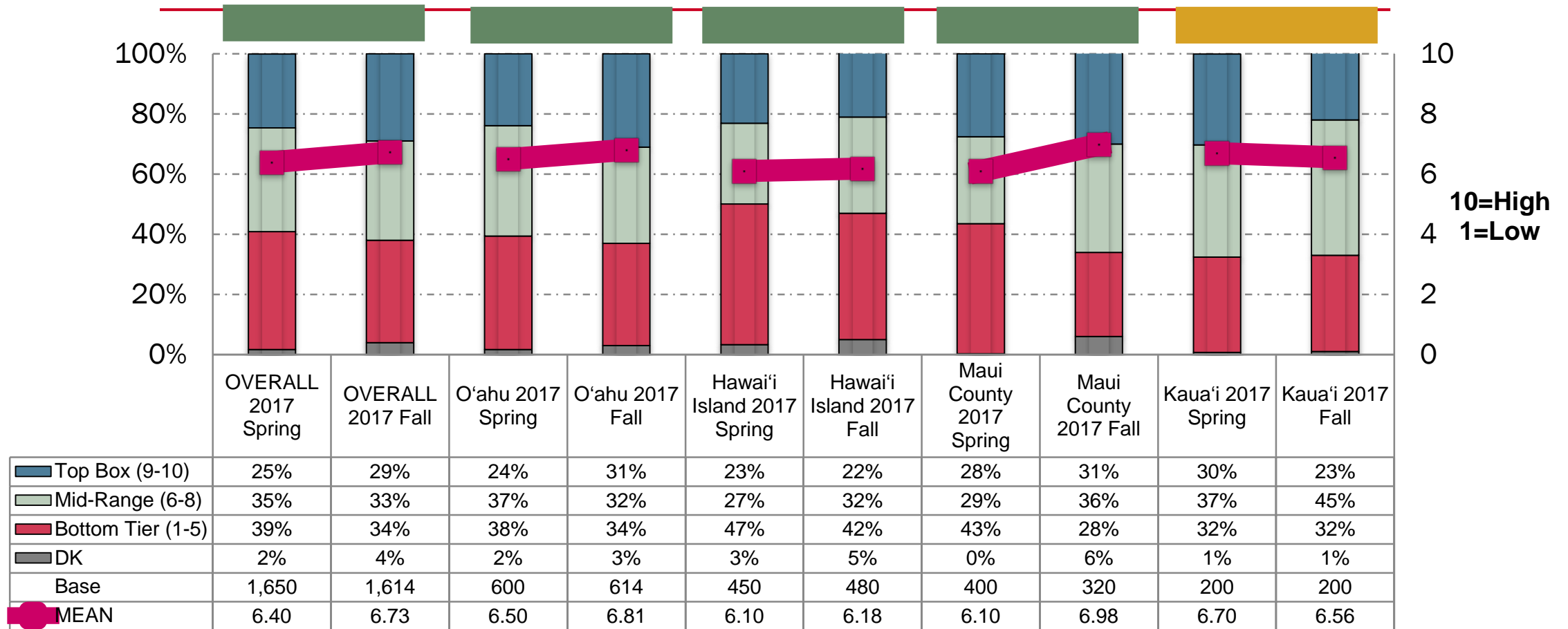
% strongly/ somewhat agree island is being run for tourists at expense of local people



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

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

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



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

Drivers of Resident Sentiment – Shift Towards Cultural/Community Benefits

Drivers (Driver Weight)	Attribute	Attribute Weights
Cultural & Community Benefits Fall: 40% (Spring: 29%)	Tourism presents Native Hawaiian language and culture in an authentic manner	10%
	I feel like I have a voice in my island’s tourism development decisions	10%
	Helps to preserves Native Hawaiian culture and language	8%
	Tourism makes me feel special because people travel to see my island’s unique features.	5%
	Tourism is consistent with community values on this island	4%
	Helps sustain Hawai‘i’s natural resources, parks and cultural sites	3%
	Tourism in Hawai‘i reminds me that we have a unique culture to share with visitors.	<1%
Economic & Social Benefits Fall: 40% (Spring: 47%)	Creates many well-paying jobs for residents	14%
	Creates shopping, restaurants and entertainment opportunities for residents	13%
	Creates jobs that have opportunities for advancement	7%
	Provides opportunities for residents to be involved	3%
	Sponsors festivals, activities & sports events for residents & visitors	3%
	Is an industry that enhances residents’ quality of life	<1%
Negative Impacts Fall: 20% (Spring: 24%)	Tourism results in a higher cost of living	6%
	Tourism in Hawai‘i increases traffic problems	5%
	My island’s economy is too dependent on tourism	5%
	This island is being run for tourists at the expense of local people	4%



Mahalo from the OmniTrak Group