

HTA Resident Sentiment Survey 2018 Highlights

Prepared for Hawai'i Tourism Authority
January 2019
Field Dates: August 27 to October 14, 2018

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 seventh consecutive year of record arrivals (i.e., during the time this survey was fielded), residents largely continued to view the industry favorably, but some indicators of Hawai'i Resident Sentiment had weakened.



Overall, residents understand the economic benefits of tourism. However, with arrivals approaching the 10 million mark, they seek benefits beyond the economic, a greater return on their “investment”.



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

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 (82%) and cellular (18%) phones.

Statewide sampling produced a total of $n = 1,635$ respondents as follows:

- O'ahu: 609
- Hawai'i Island: 451
- Maui County: 375
- 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 over four-in-ten (41%) respondents completed the survey via telephone and the remainder (59%) 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: August 27 to October 14, 2018

Key Resident Sentiment Indicators – Impact of Hawai‘i Tourism

Notable decrease

Perception of tourism industry in Hawai‘i - Favorability

Holding steady

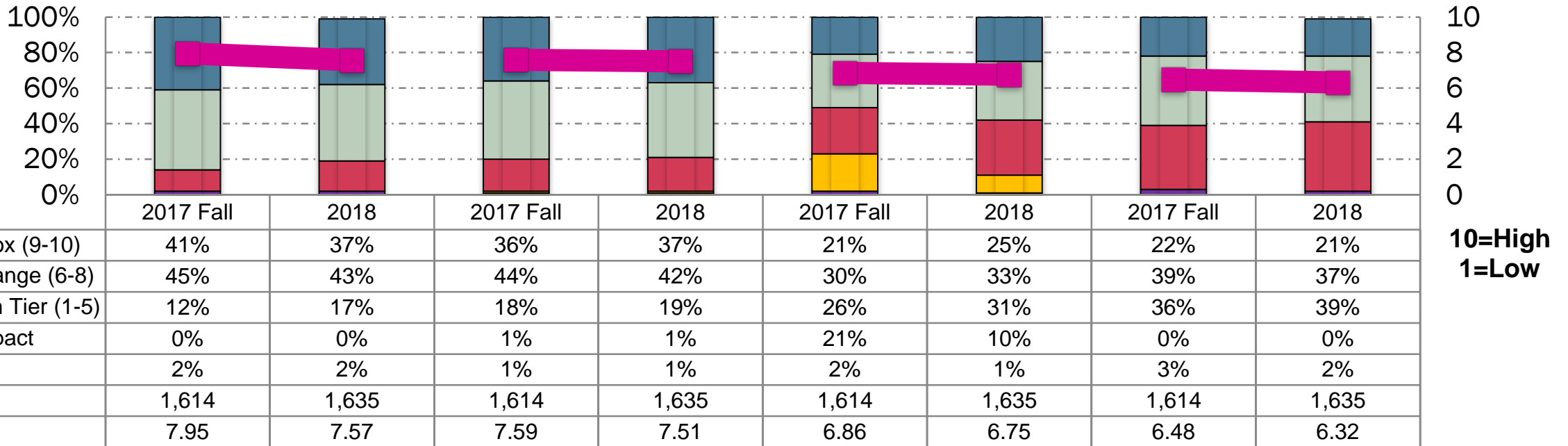
Perceived impact of tourism on the State

Decrease

Perceived impact of tourism on You and Your Family

Decrease

Tourism has brought more benefits than problems

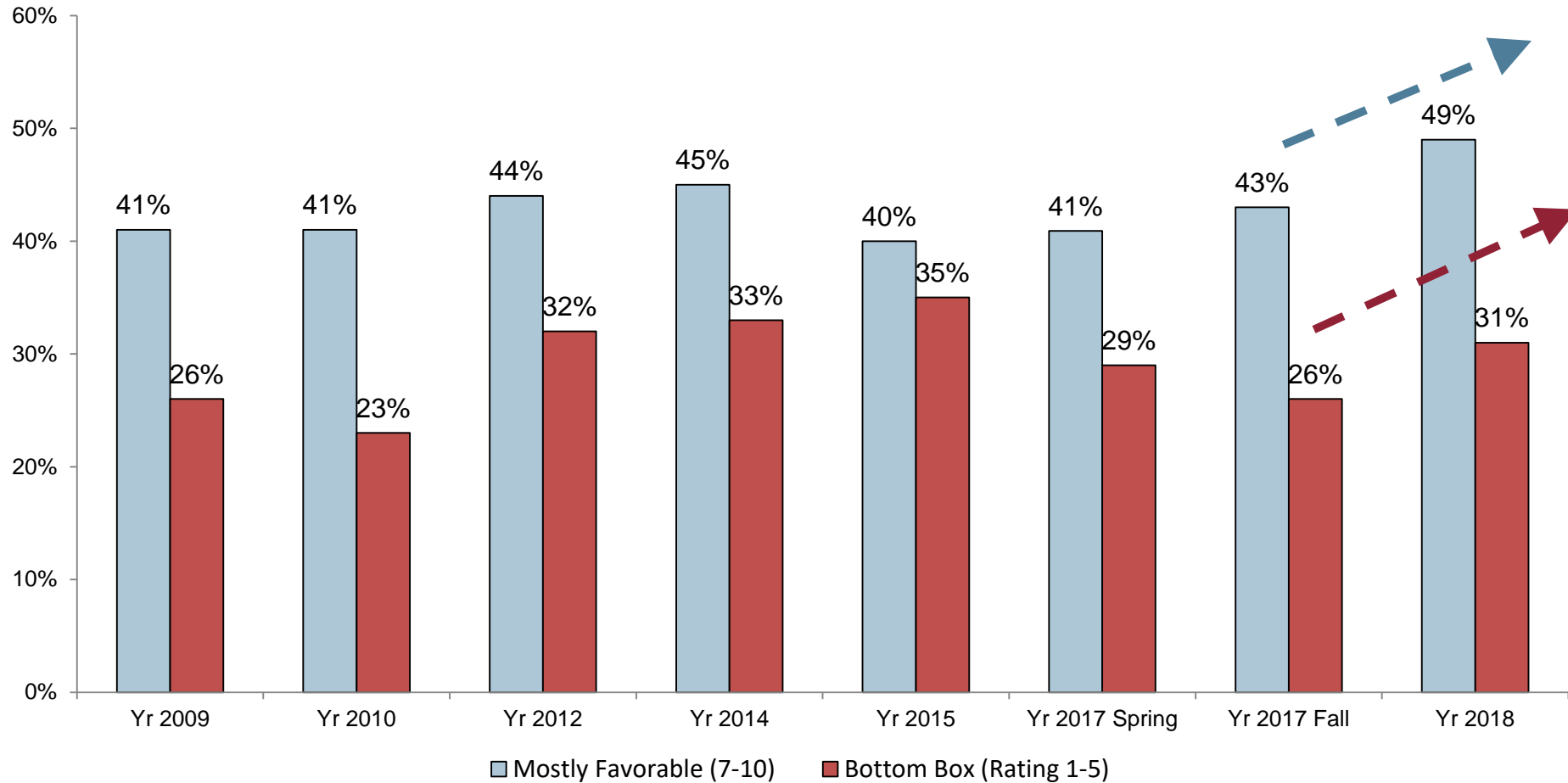


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai‘i.

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?

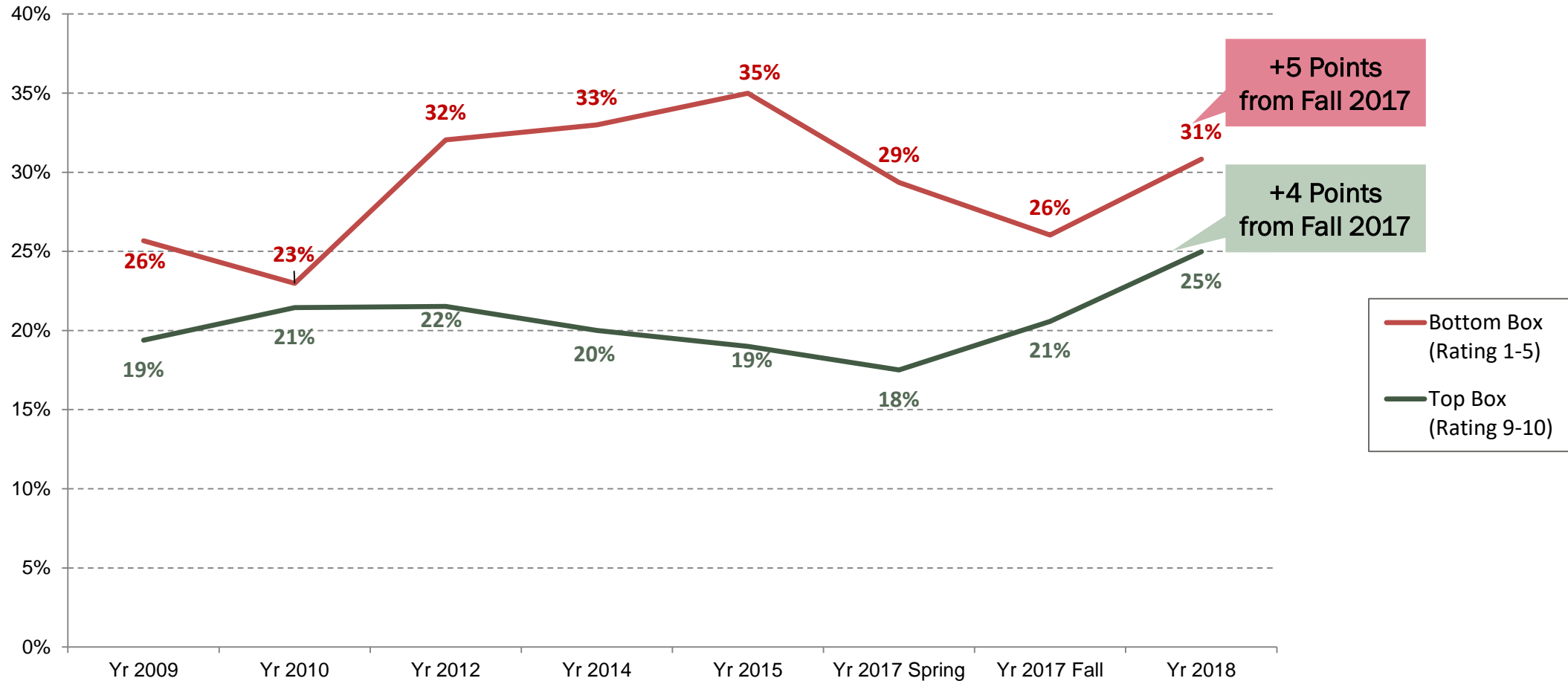
Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that... Tourist has brought more benefits than problems?

Impact of Tourism on You & Your Family



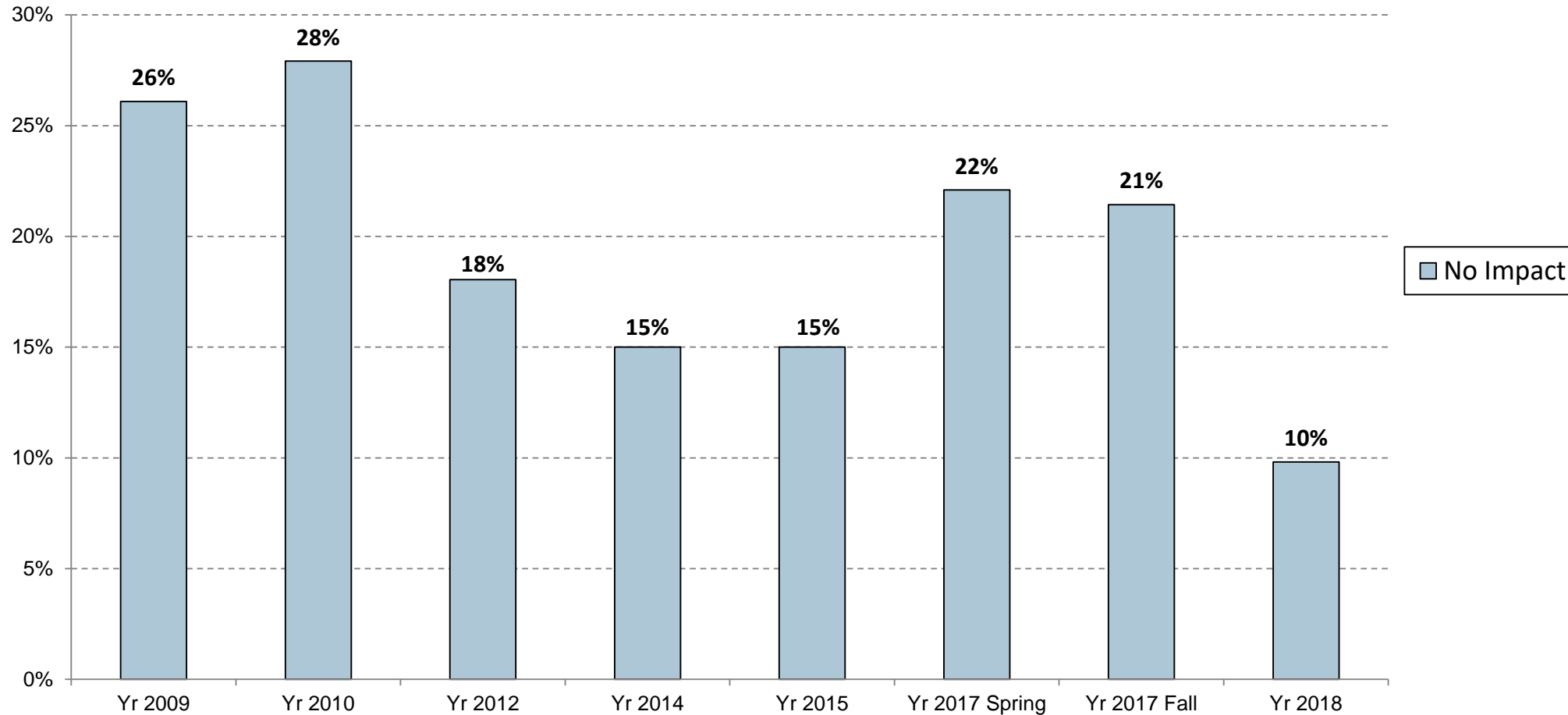
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family



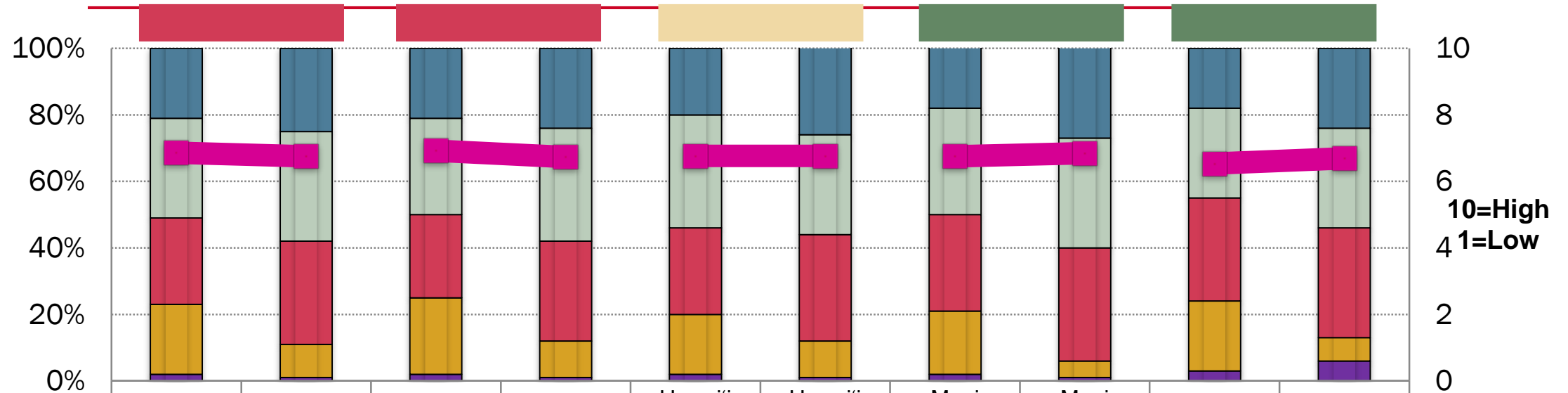
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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?

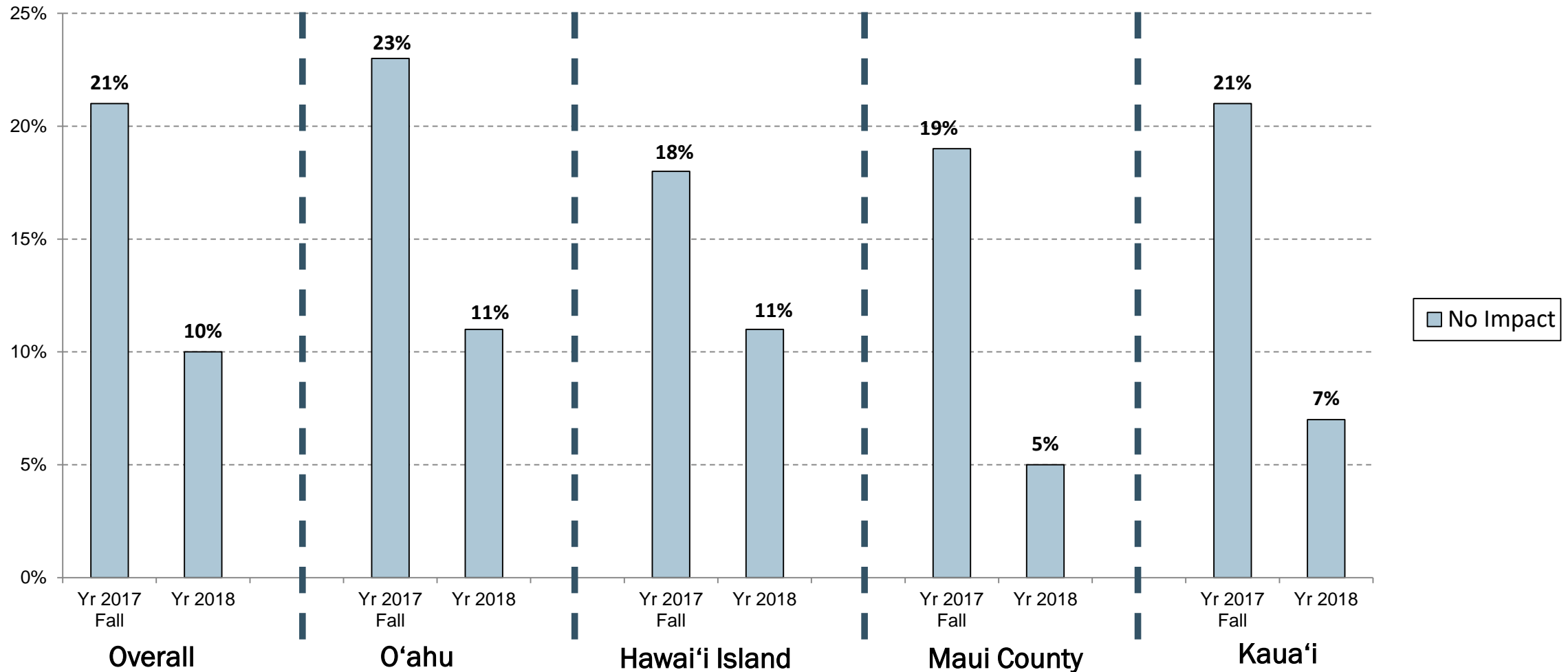
Impact of Tourism on You & Your Family - *By Island*



	OVERALL 2017 Fall	OVERALL 2018	O'ahu 2017 Fall	O'ahu 2018	Hawai'i Island 2017 Fall	Hawai'i Island 2018	Maui County 2017 Fall	Maui County 2018	Kaua'i 2017 Fall	Kaua'i 2018
Top Box (9-10)	21%	25%	21%	24%	20%	27%	19%	29%	18%	24%
Mid-Range (6-8)	30%	33%	29%	34%	34%	30%	32%	33%	27%	30%
Bottom Tier (1-5)	26%	31%	25%	30%	26%	32%	29%	34%	31%	33%
No Impact	21%	10%	23%	11%	18%	11%	19%	5%	21%	7%
DK/Rf	2%	1%	2%	1%	2%	1%	2%	1%	3%	6%
Base	1,614	1,635	614	609	480	451	320	375	200	200
MEAN	6.86	6.75	6.92	6.73	6.77	6.77	6.75	6.85	6.54	6.69

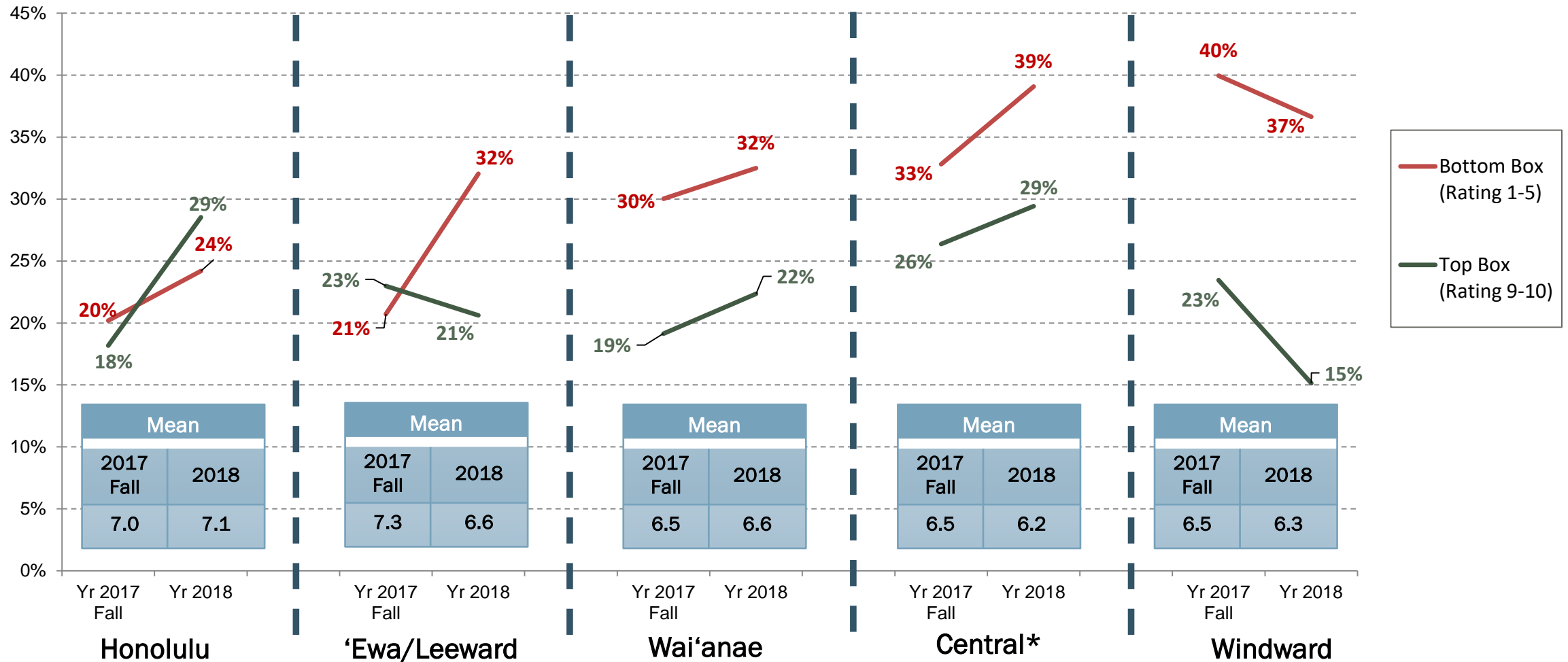
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – No Impact – By Island



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?

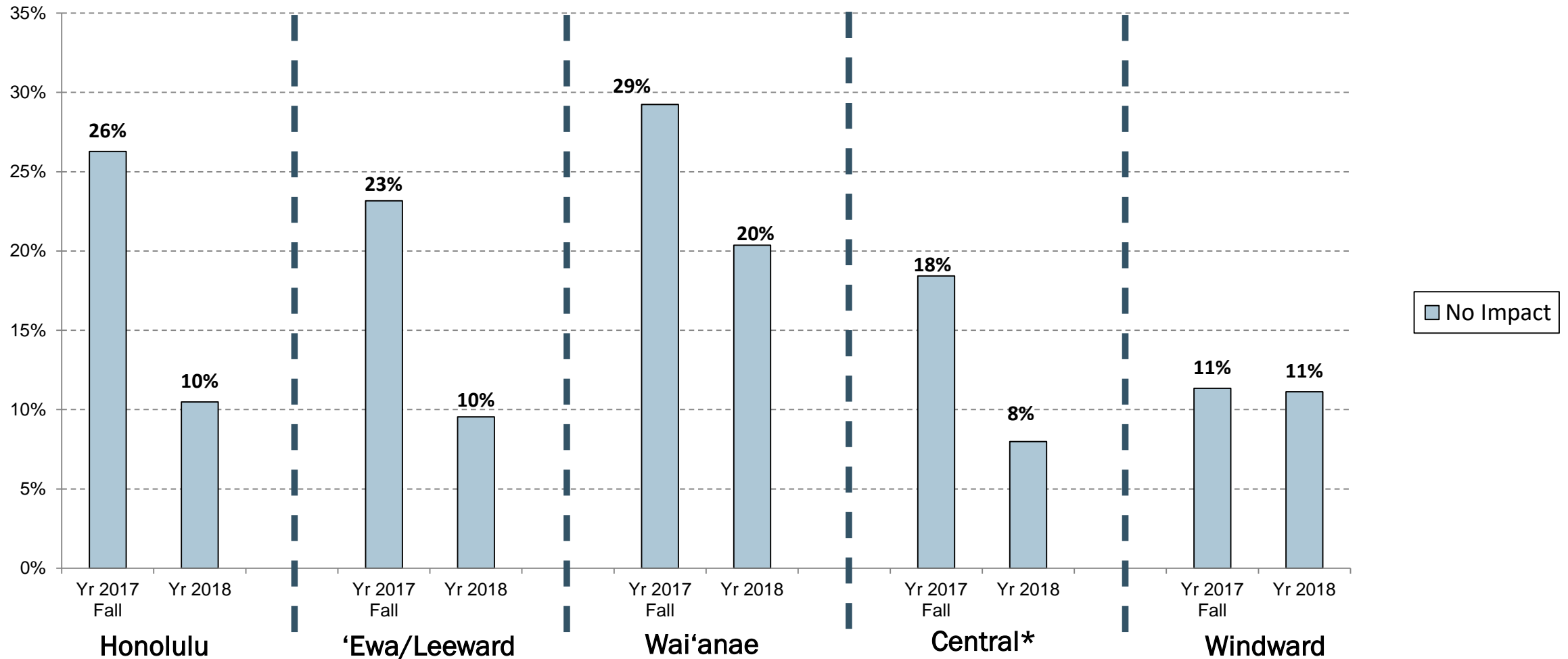
Impact of Tourism on You & Your Family – O‘ahu Regions



*Note: Due to a small North Shore sample size, North Shore is included in Central.

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?

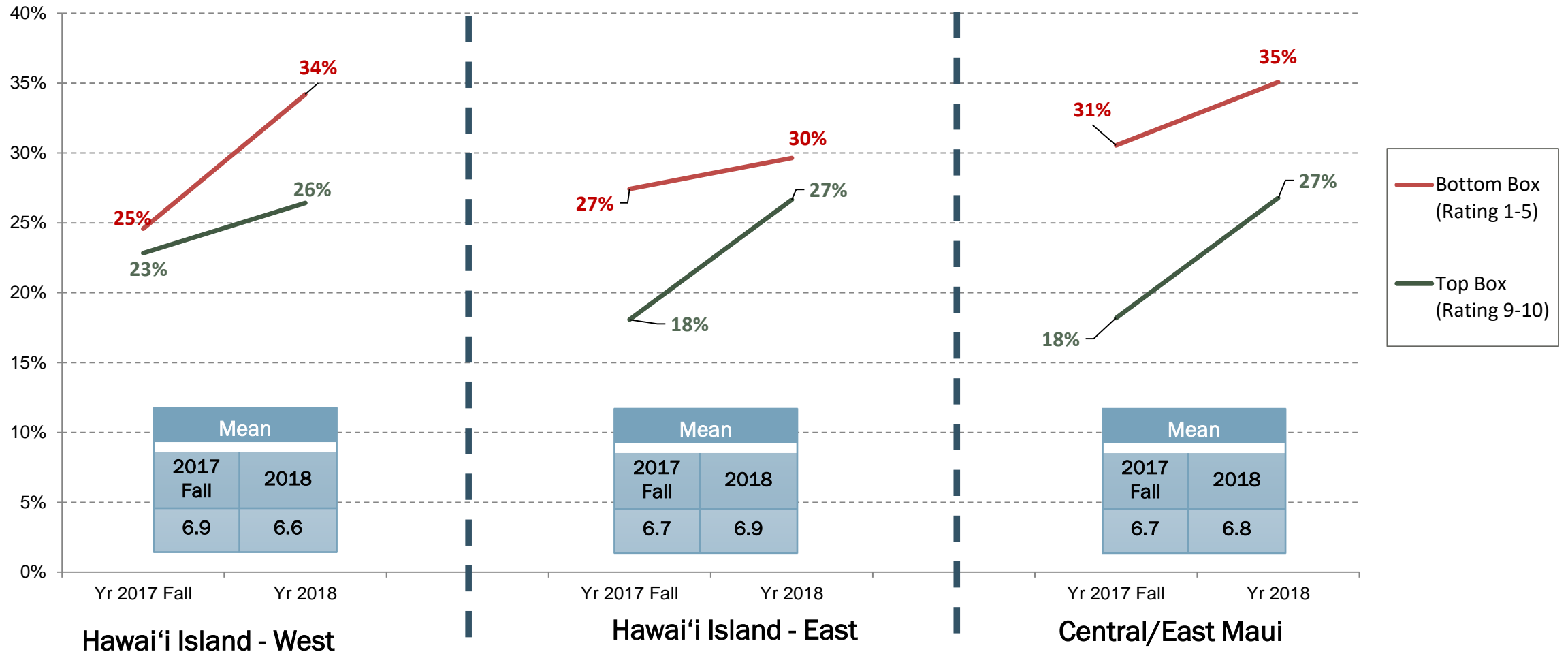
Impact of Tourism on You & Your Family – No Impact - O‘ahu Regions



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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?

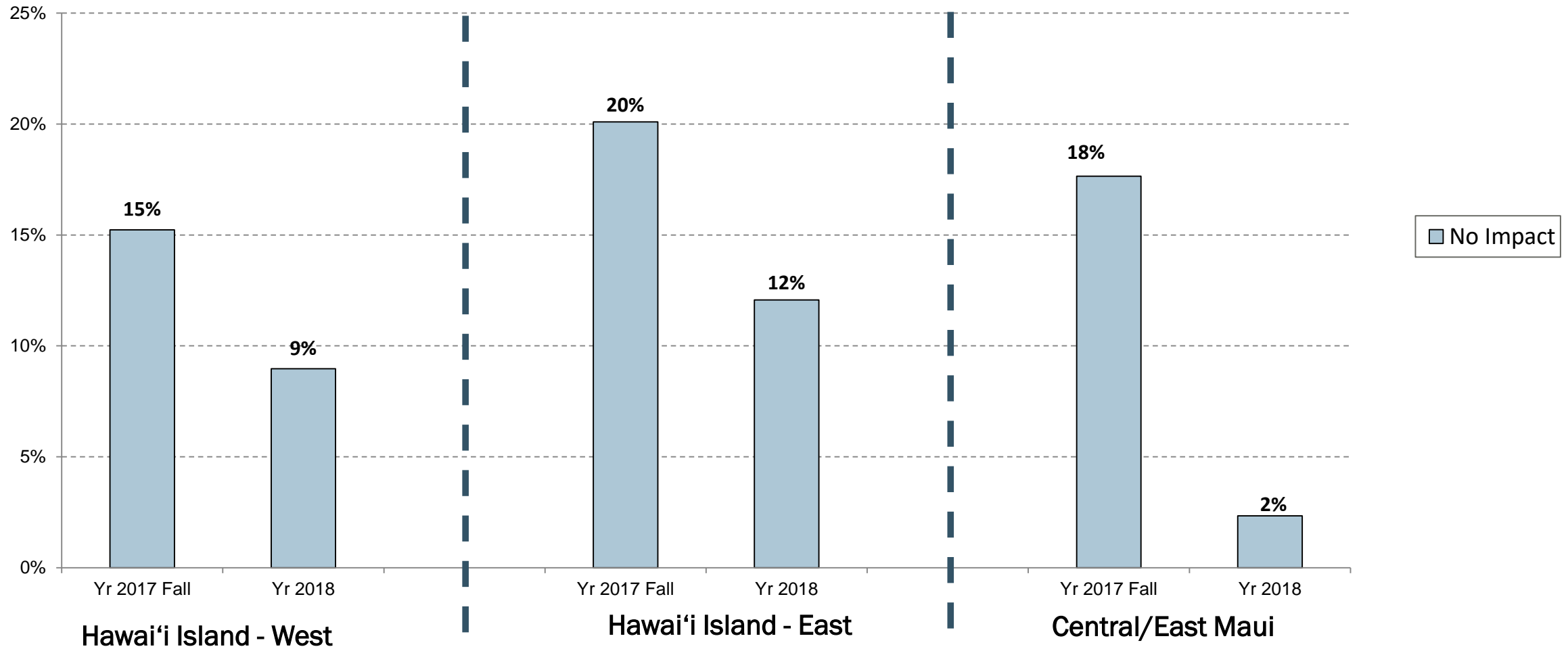
Impact of Tourism on You & Your Family – Neighbor Island Regions



*Note: Due to small sample sizes, regional charts for Kaua'i, West Maui, Moloka'i and Lāna'i are not included.

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 - Neighbor Island Regions



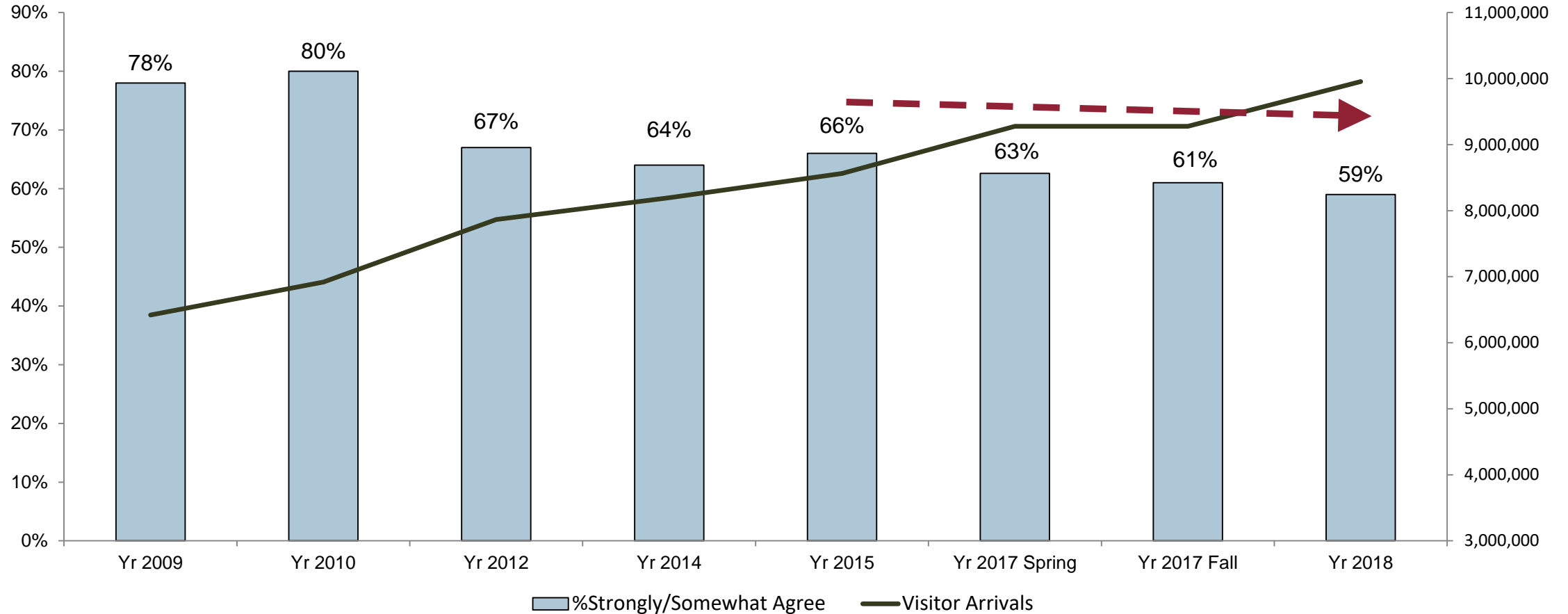
*Note: Due to small sample sizes, regional charts for Kaua'i, West Maui, Moloka'i and Lāna'i are not included.

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”

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

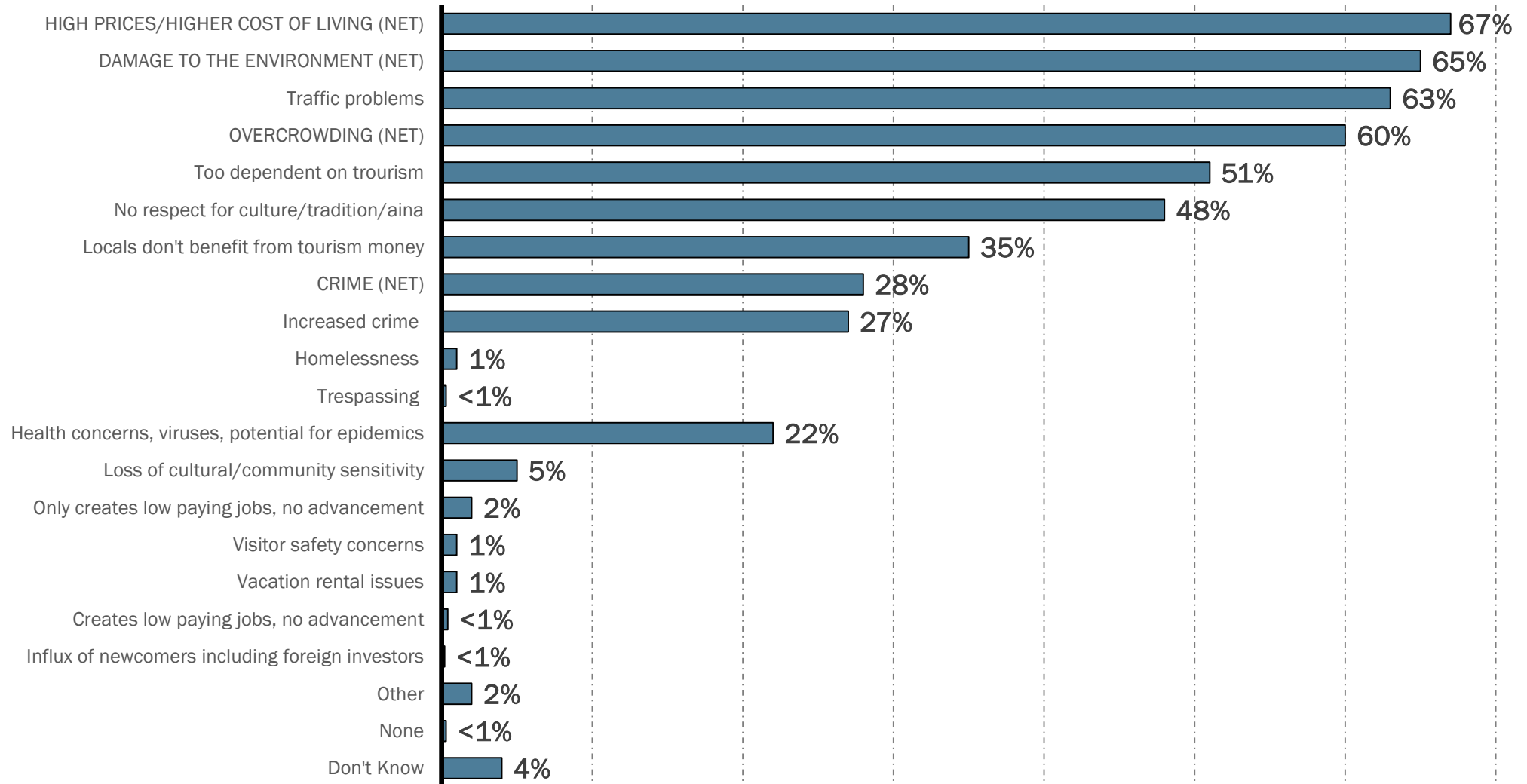
Annual Visitor Arrivals



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...?

Problems Created by Tourism in Hawai'i

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

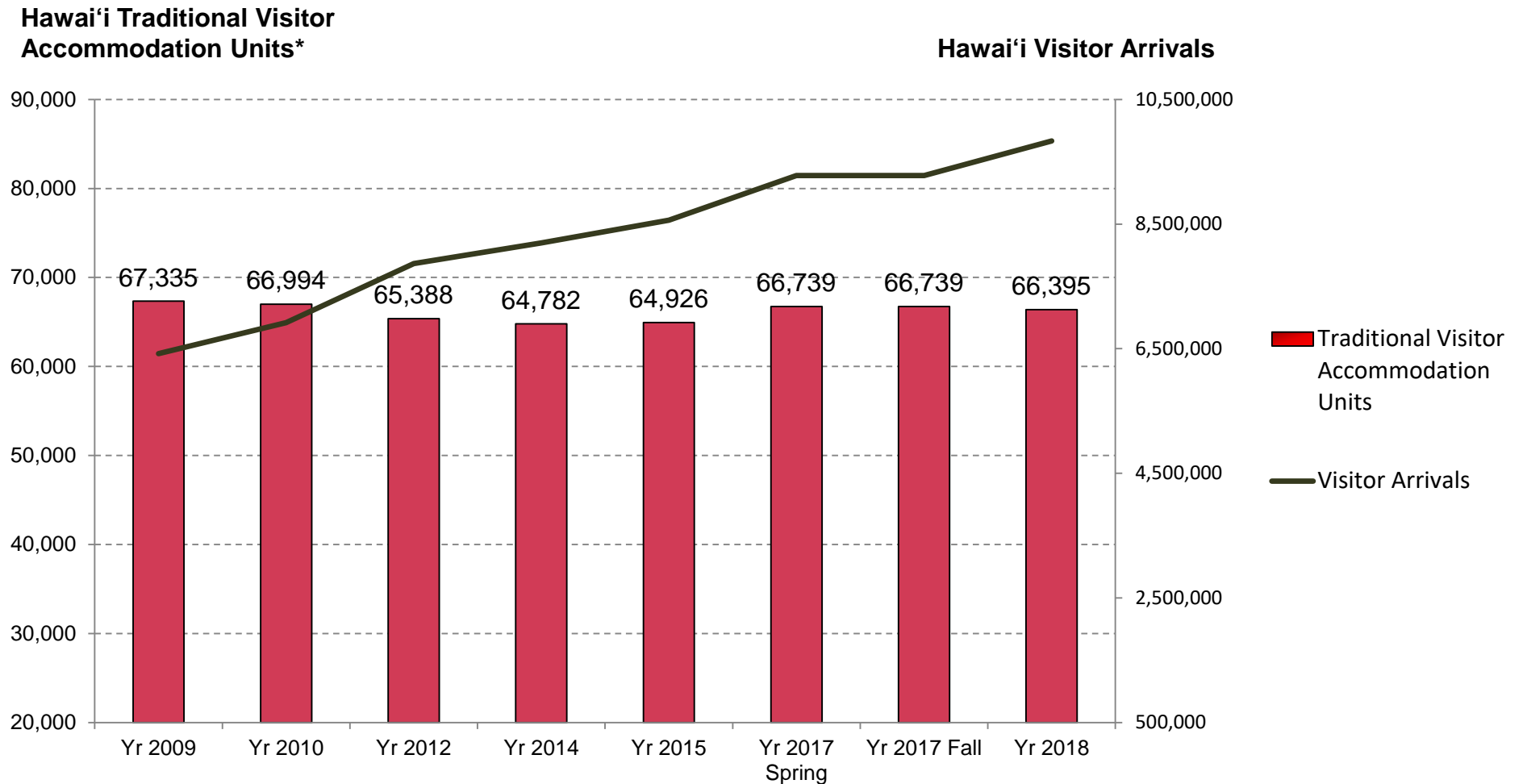


Q5a. In your opinion, what problems do you think tourism has created in Hawai'i?

Other Marketplace Considerations

Other Marketplace Considerations

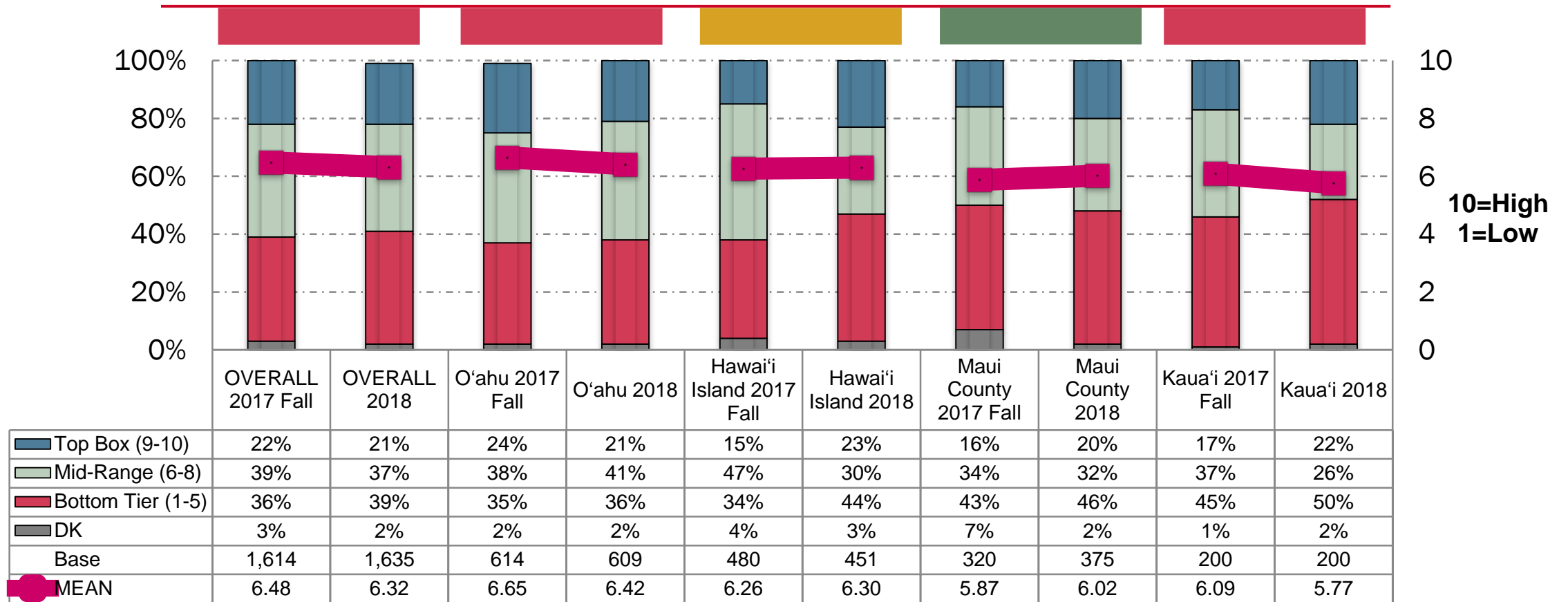
- Hawai'i resident count has also been on the rise. (+4% between 2010 & 2018)
- Fueled by the Sharing Economy and Social Media, visitors are appearing in places they have not been in in the past



Source: Hawai'i Tourism Authority

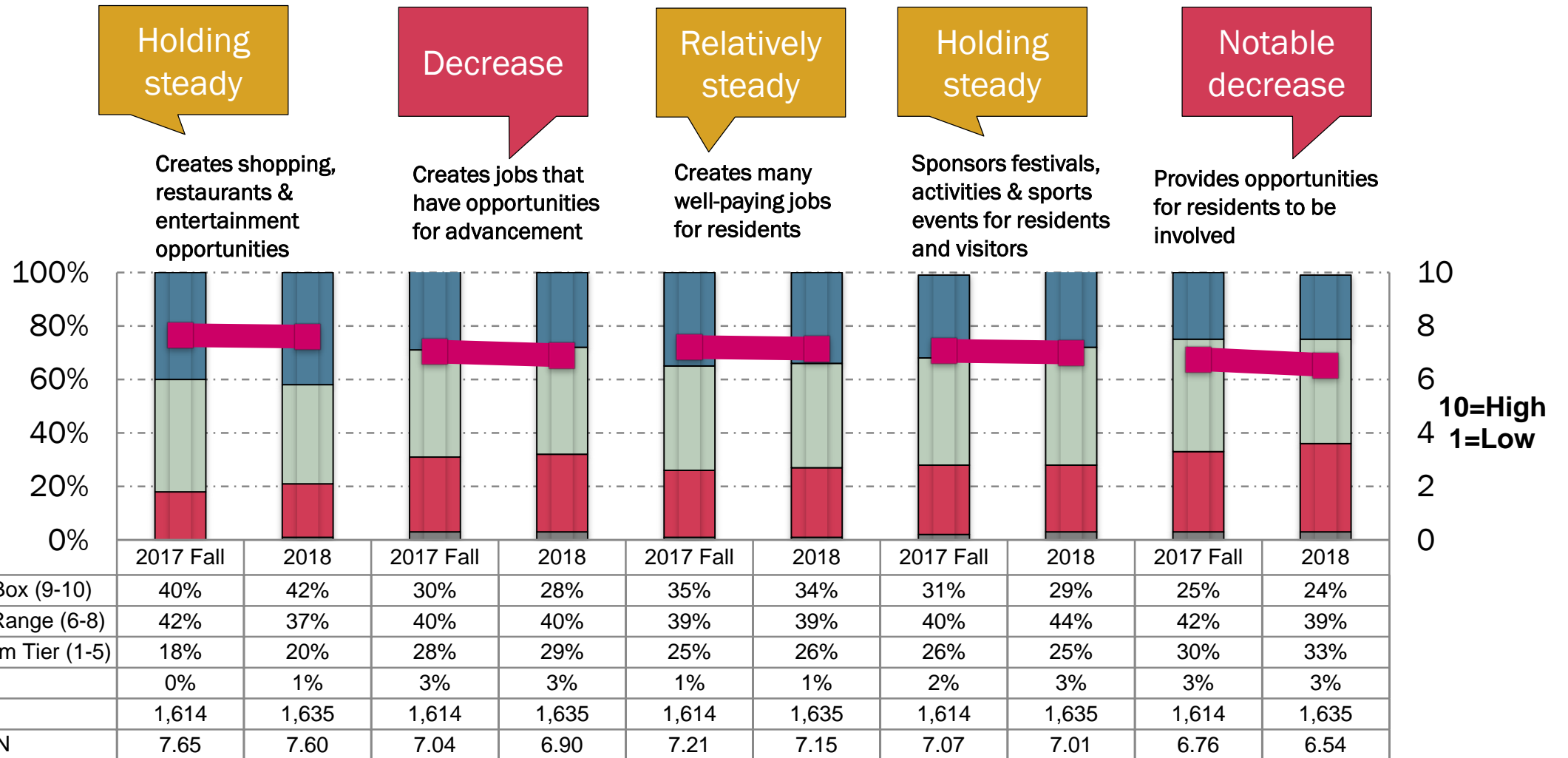
*Note: Traditional units include hotel, condo hotel and timeshare units

“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



Q3. 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

Increase

Tourism increases traffic problems

Slight decrease

Tourism results in a higher cost of living

Decrease

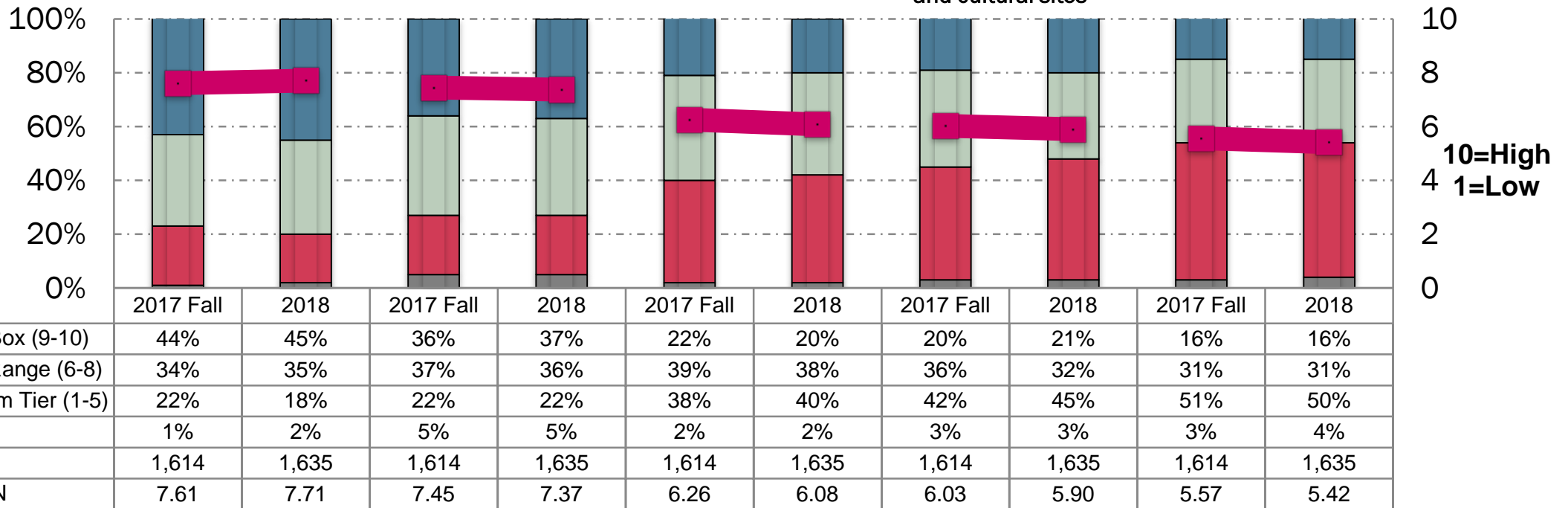
Enhances residents' quality of life

Decrease

Helps sustain Hawai'i's natural resources, parks and cultural sites

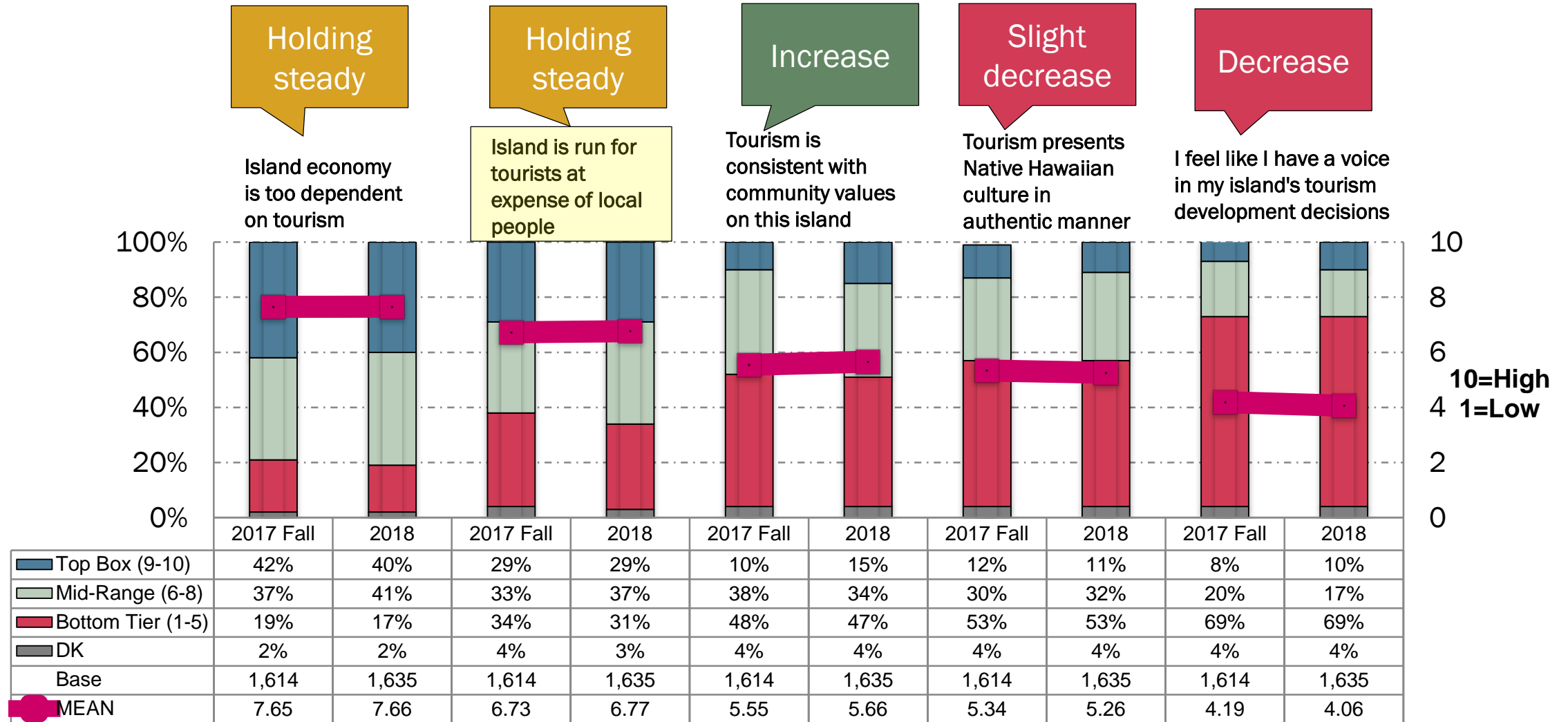
Decrease

Helps preserve Native Hawaiian culture and language



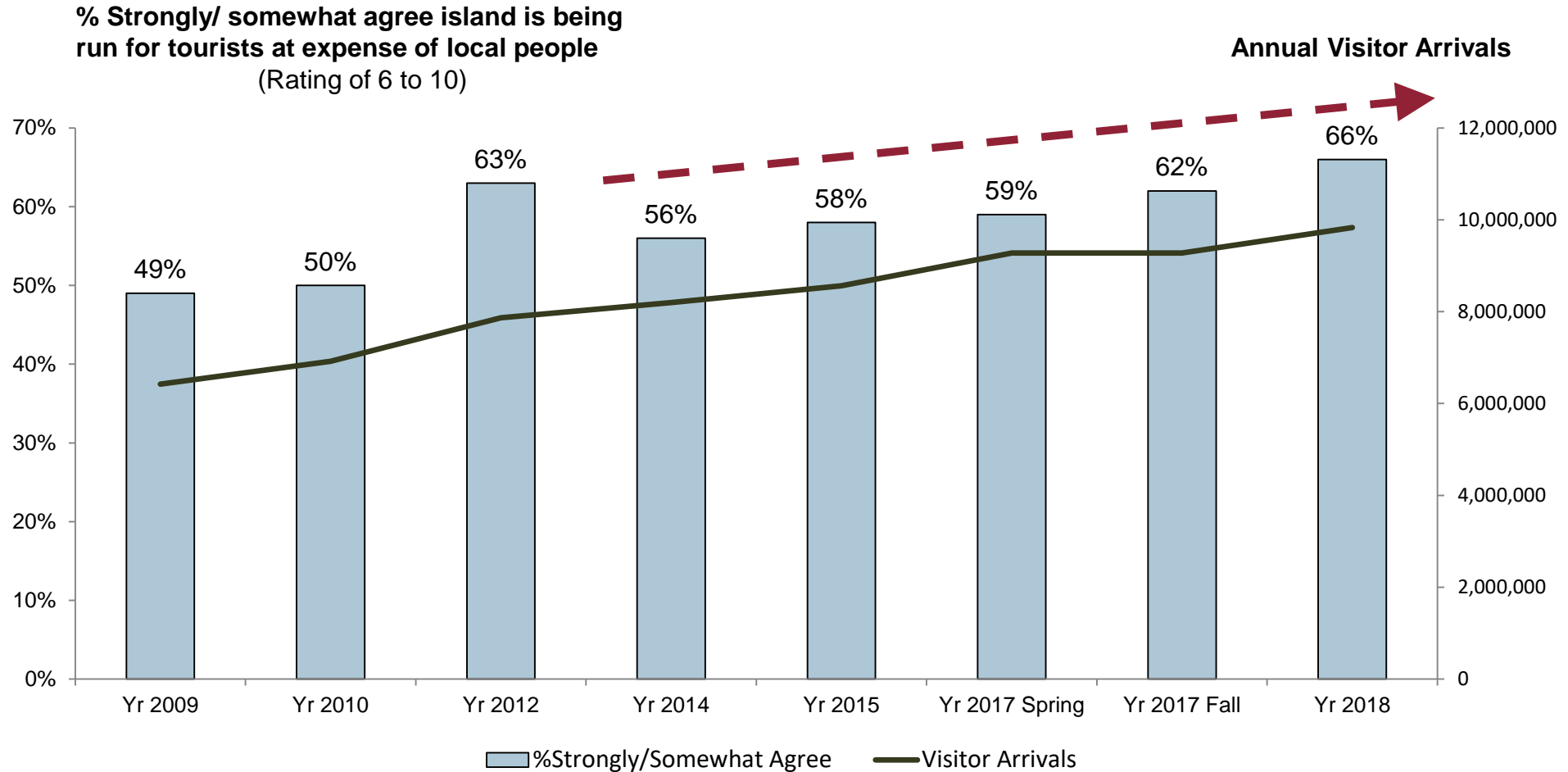
Q3 & Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

General Perceptions of Tourism



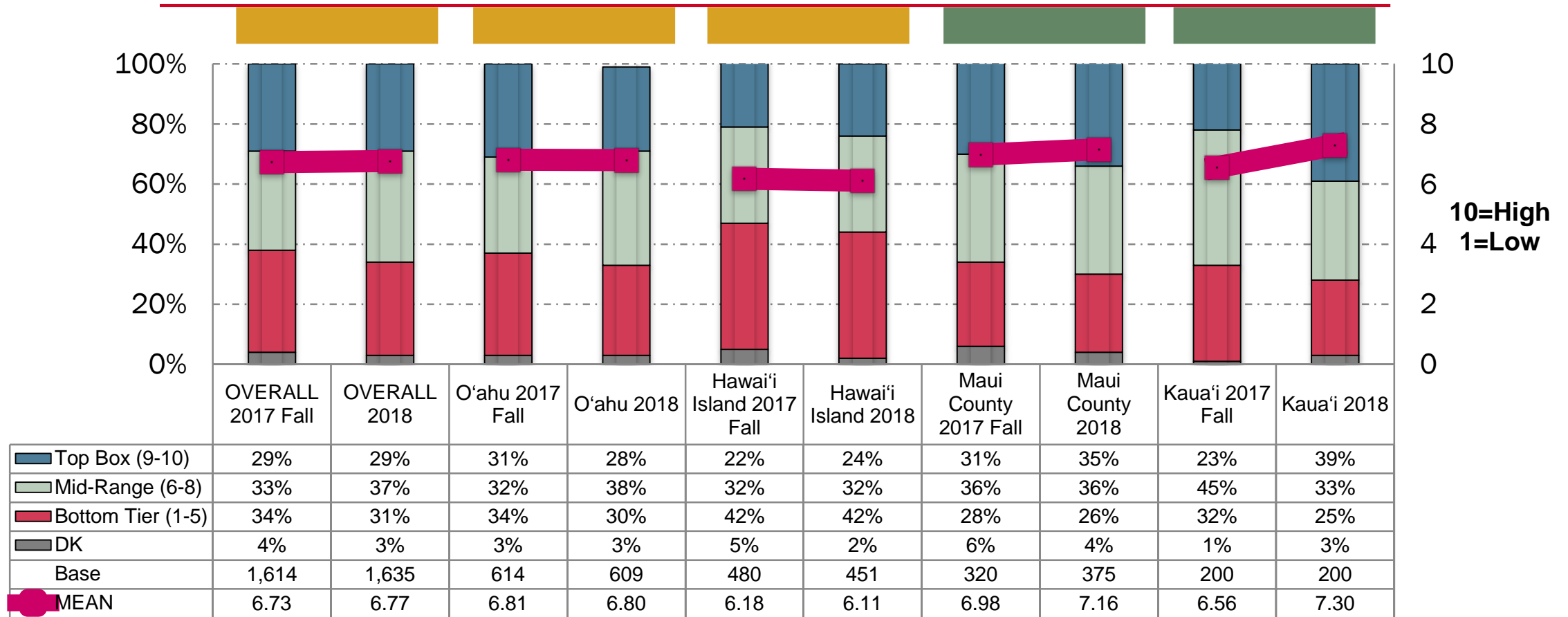
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that ...

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



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

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



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

General Perceptions

Decrease

Funds should be spent to promote tourism in Hawai'i

Decrease

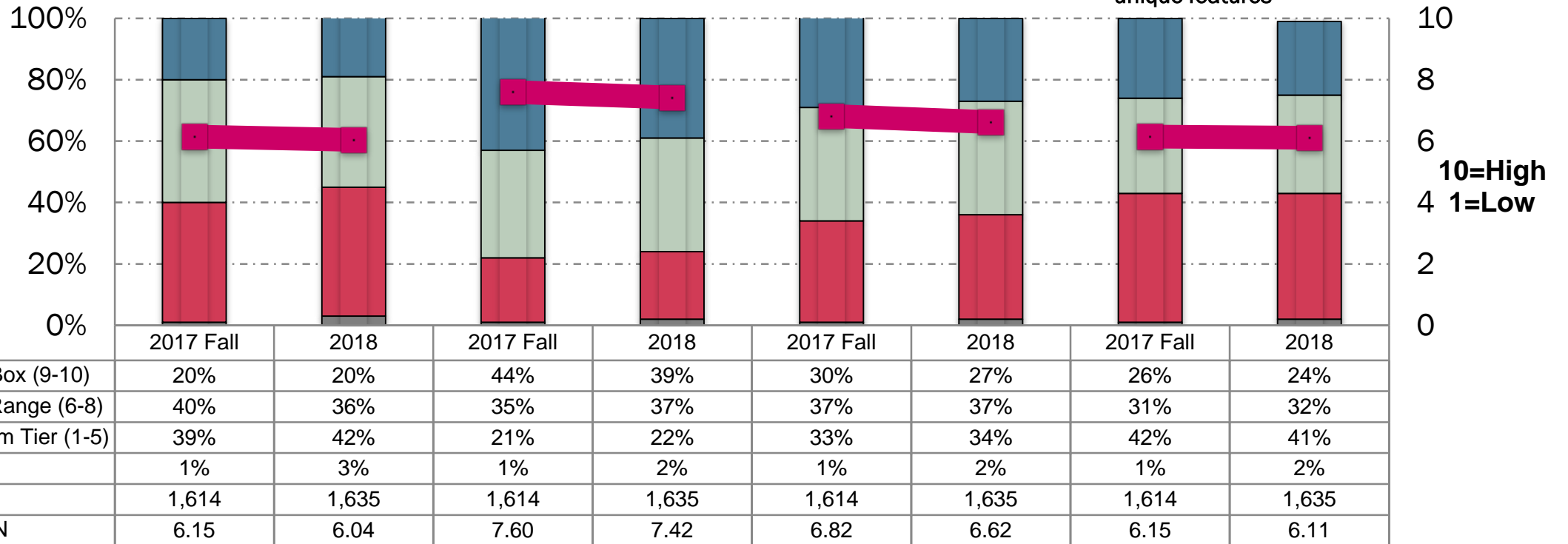
Tourism reminds me we have a unique culture to share

Decrease

Tourism should be actively encouraged on my island

Holding steady

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



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 ...

Drivers of Resident Sentiment

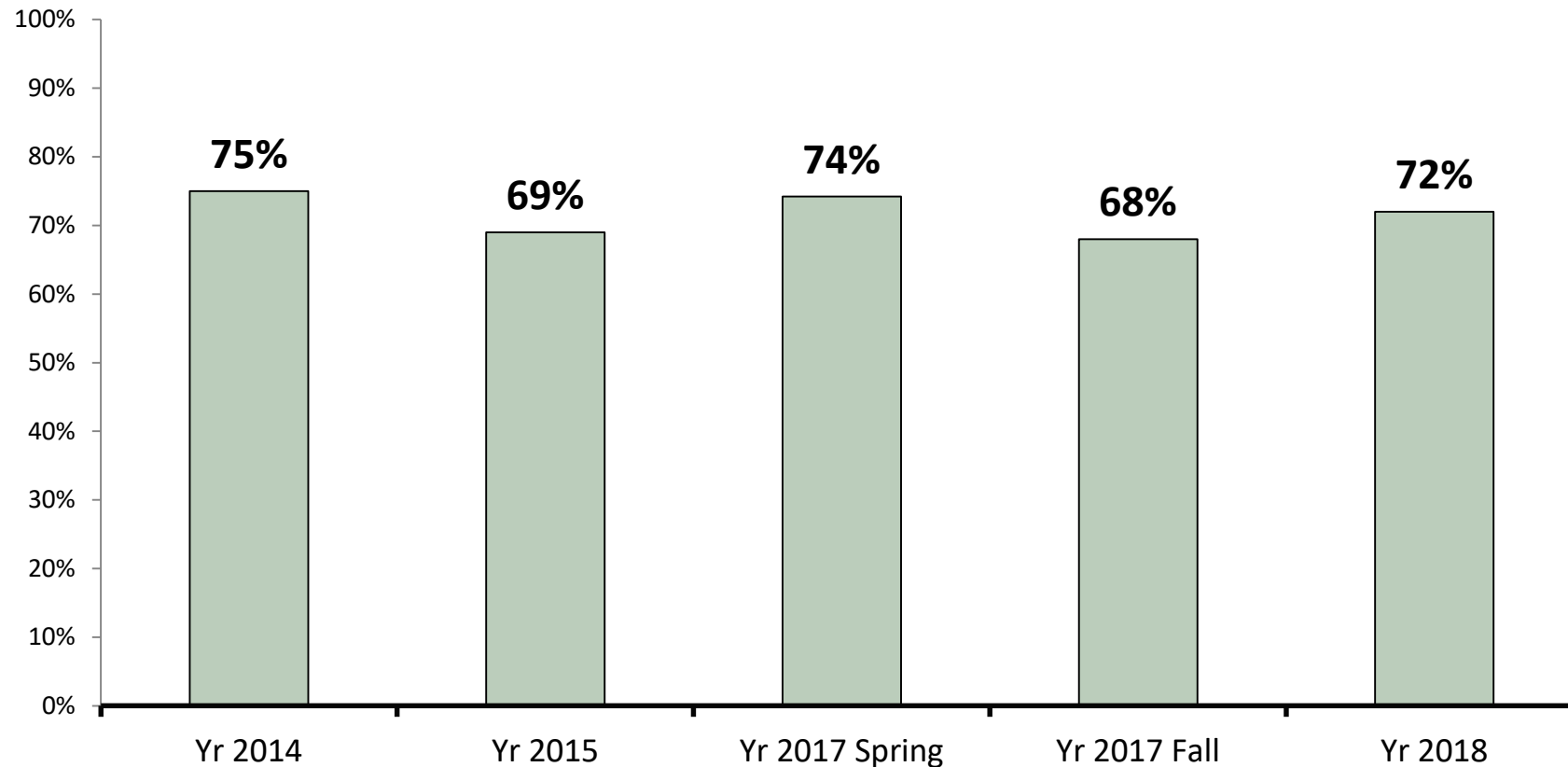
Drivers (Driver Weight)	Attribute	Attribute Weights
Cultural & Community Benefits (55%) Fall '17: 40% Spring '17: 29%	I feel like I have a voice in my island's tourism development decisions	15%
	Tourism presents Native Hawaiian language and culture in an authentic manner	14%
	Helps to preserves Native Hawaiian culture and language	12%
	Tourism is consistent with community values on this island	10%
	Helps sustain Hawai'i's natural resources, parks and cultural sites	5%
	Tourism makes me feel special because people travel to see my island's unique features.	<1%
	Tourism in Hawai'i reminds me that we have a unique culture to share with visitors.	<1%
Negative Impacts (25%) Fall '17: 20% Spring '17: 24%	Tourism results in a higher cost of living	7%
	My island's economy is too dependent on tourism	7%
	Tourism in Hawai'i increases traffic problems	6%
	This island is being run for tourists at the expense of local people	6%
Economic & Social Benefits (20%) Fall '17: 40% Spring '17: 47%	Creates many well-paying jobs for residents	7%
	Creates shopping, restaurants and entertainment opportunities for residents	5%
	Creates jobs that have opportunities for advancement	3%
	Provides opportunities for residents to be involved	4%
	Sponsors festivals, activities & sports events for residents & visitors	1%
	Is an industry that enhances residents' quality of life	<1%





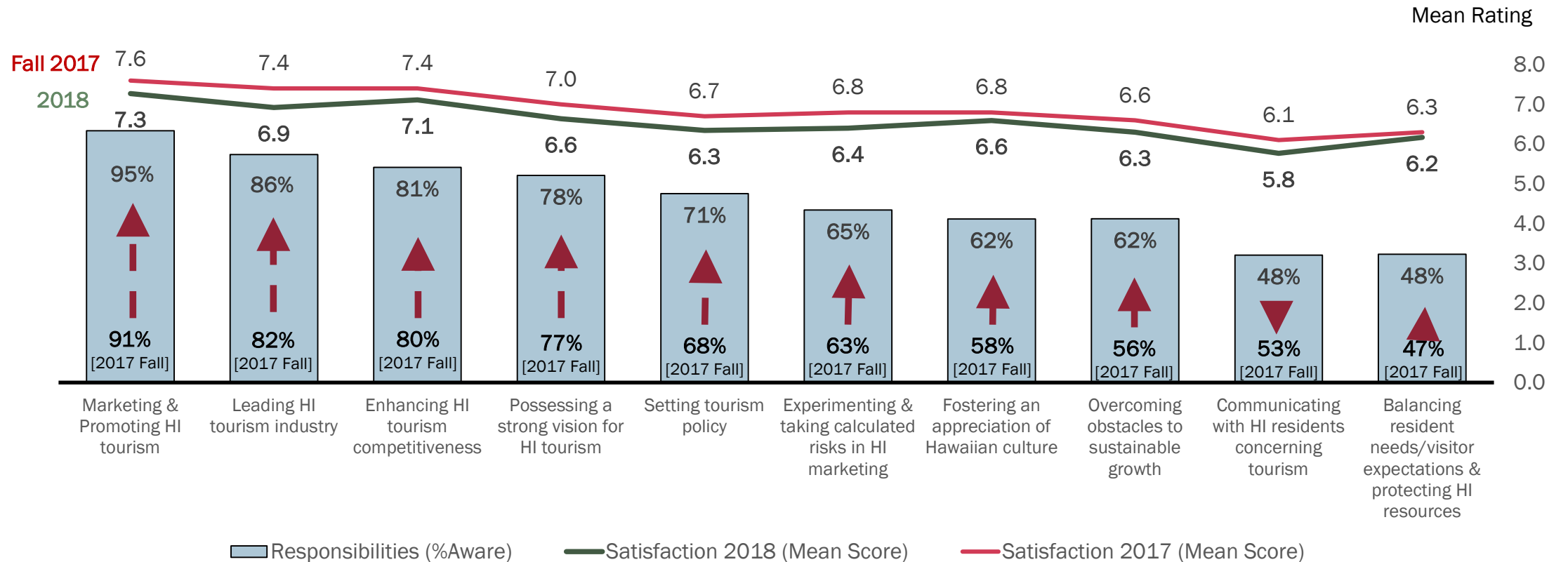
Hawai'i Tourism Authority Insights

Hawai'i Tourism Authority Aided Name Awareness



Q6. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

Perception of Hawai'i Tourism Authority Roles & Responsibilities



Q8a. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for and has an important role in?

Q8b. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority is doing an Excellent job and 1 means you think the Hawai'i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?

Drivers of Hawai'i Tourism Authority Favorability

Drivers (Driver Weight)	Attribute	Attribute Weights
Communication with Residents & Balancing Needs (47%) [Fall 2017: 34%]	Communicating with, and listening to, Hawai'i residents	21%
	Fostering an appreciation of the contributions the Hawaiian culture offers to the world	15%
	Balancing the needs of residents with expectations of visitors and protecting the resources of Hawai'i	11%
Vision & Risk Taking (22%) [Fall 2017: 14%]	Possessing a strong vision	16%
	Setting tourism policy and direction for ongoing, sustainable growth	6%
	Taking initiative to overcome obstacles	<1%
	Experimenting and taking calculated risks in supporting and marketing Hawai'i tourism	<1%
Competitiveness (16%) [Fall 2017: 25%]	Enhancing the competitiveness of Hawai'i as a destination	16%
Marketing & Leadership (14%) [Fall 2017: 27%]	Marketing and promoting tourism to Hawai'i	8%
	Leading the tourism industry in Hawai'i	6%



Mahalo from the OmniTrak Group