



2015 HTA RESIDENT SENTIMENT STUDY

Prepared for:
Hawai'i Tourism Authority
Board of Directors

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Executive Summary

- Overtime, the overall general perception of tourism in Hawai'i remains stable at a mean of about 8.0 on a 10 point scale.
 - When those who feel favorably towards the visitor industry are asked what they might do to support tourism, many cite “Showing aloha/ kindness to tourists.” Most do not recognize or identify a sanctioned or official way in which to contribute.
- We see small incremental declines in perception on each island when residents are asked about the impact tourism has made on the State as a whole.
- There are similar drops when respondents are asked about tourism’s impact on them personally. In fact, the current score for this measurement (tourism’s impact on you and your family) marks its lowest mark since we began asking this question. This decline appears to be fuelled primarily by lower scores on O'ahu.
 - Among those who reside in households with at least one member working in the visitor industry we note a consistent decline in mean scores over the last three reporting periods.

Executive Summary – continued

- Among the seven benefits associated with tourism that were tested and that have historical data to track, all report lower mean ratings than the prior year, though in most instances these drops are relatively small, they represent declines nonetheless.
- When participants are asked directly if tourism has brought more benefits than problems the mean rating remains virtually unchanged from a year ago at 6.65 vs 6.64 (2014).
- Agreement with the statement that funds should be spent to promote tourism to Hawai'i is down this year.

Executive Summary – continued

- Many residents continue to believe that they do not have a voice in their island's tourism development decisions.
- Less than half agree that the tourism industry presents Native Hawaiian culture in an authentic manner.
- 29% of Hawai'i residents had not heard of HTA prior to taking part in the study. This marks a six-point decline from the prior year.
- 64% of Hawai'i residents were aware that HTA is responsible for marketing and promoting tourism to Hawai'i.
- Just 34% knew that one of HTA's responsibilities is to communicate and listen to Hawai'i residents concerning tourism-related issues and concerns.
- Similarly only 32% of Hawai'i residents were aware that HTA was tasked with balancing the needs of residents with the expectations of visitors and protecting the resources of Hawai'i.

Objectives

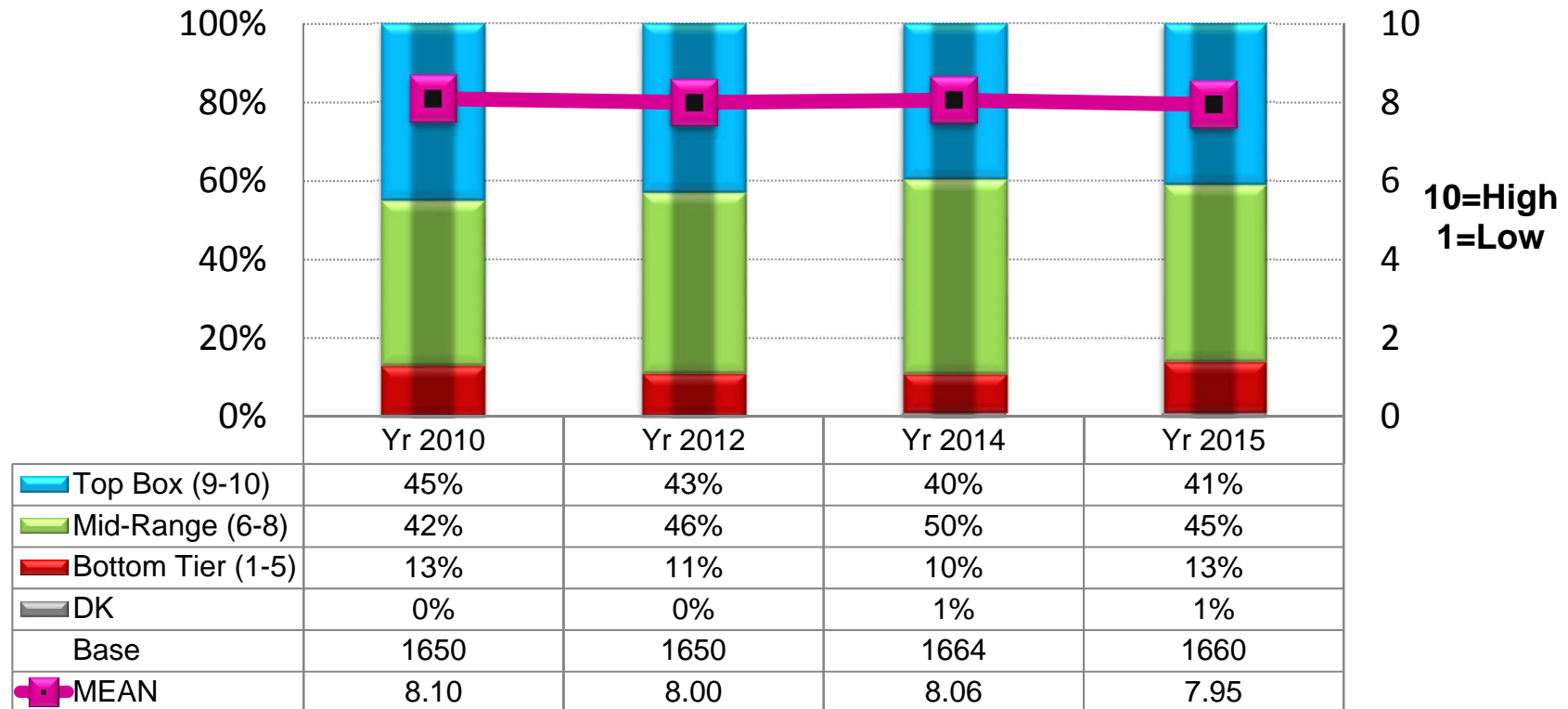
- To track key resident sentiments toward tourism in Hawai'i over time;
- To identify residents' primary perceived negatives and positives of tourism's impact on residents; and
- To identify for the Visitor Industry and HTA, current or future issues or concerns regarding Tourism expressed by residents.

Methodology

- Telephone Study
 - 34% Landline/ 66% Cellular
- Field Dates: October 10, 2015 to December 5, 2015
- Statewide Sample – n=1660
 - O'ahu – n=606
 - Hawai'i Island – n=450
 - Maui County – n=402
 - Kaua'i - n=202
- Data was weighted to reflect population by island of adults 18+ (source: DBEDT) and estimates of ethnicity by island.
- Margin of error n=1660/ +/- 2.40 percentage points w/ 95% confidence level
- Sample derived using QMark's Random Digit Dialing software.

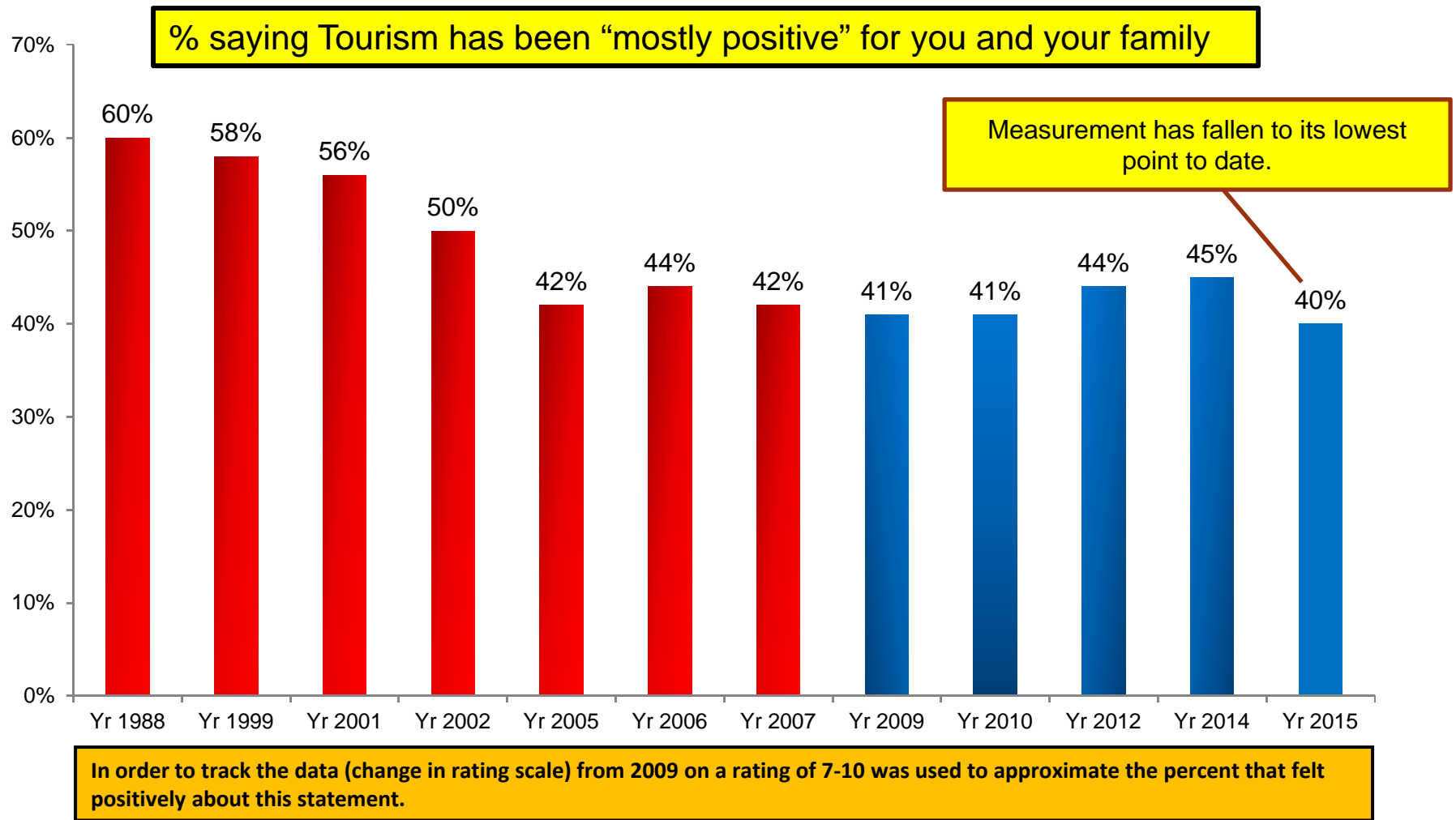
Perception of Tourism Industry in Hawai'i -

Overall



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?

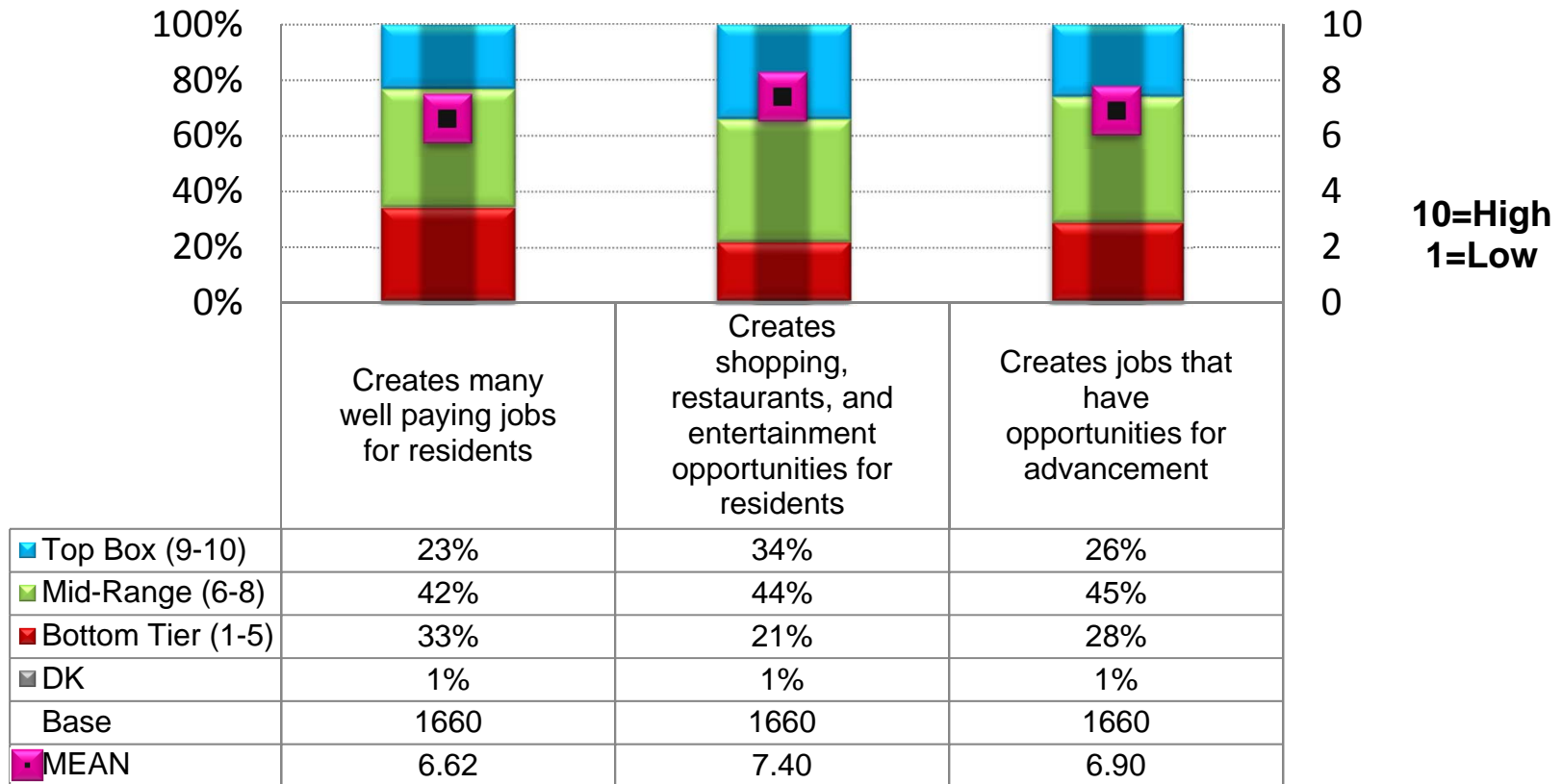
Impact of Tourism on You & Your Family- *Overall*



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...you and your family?

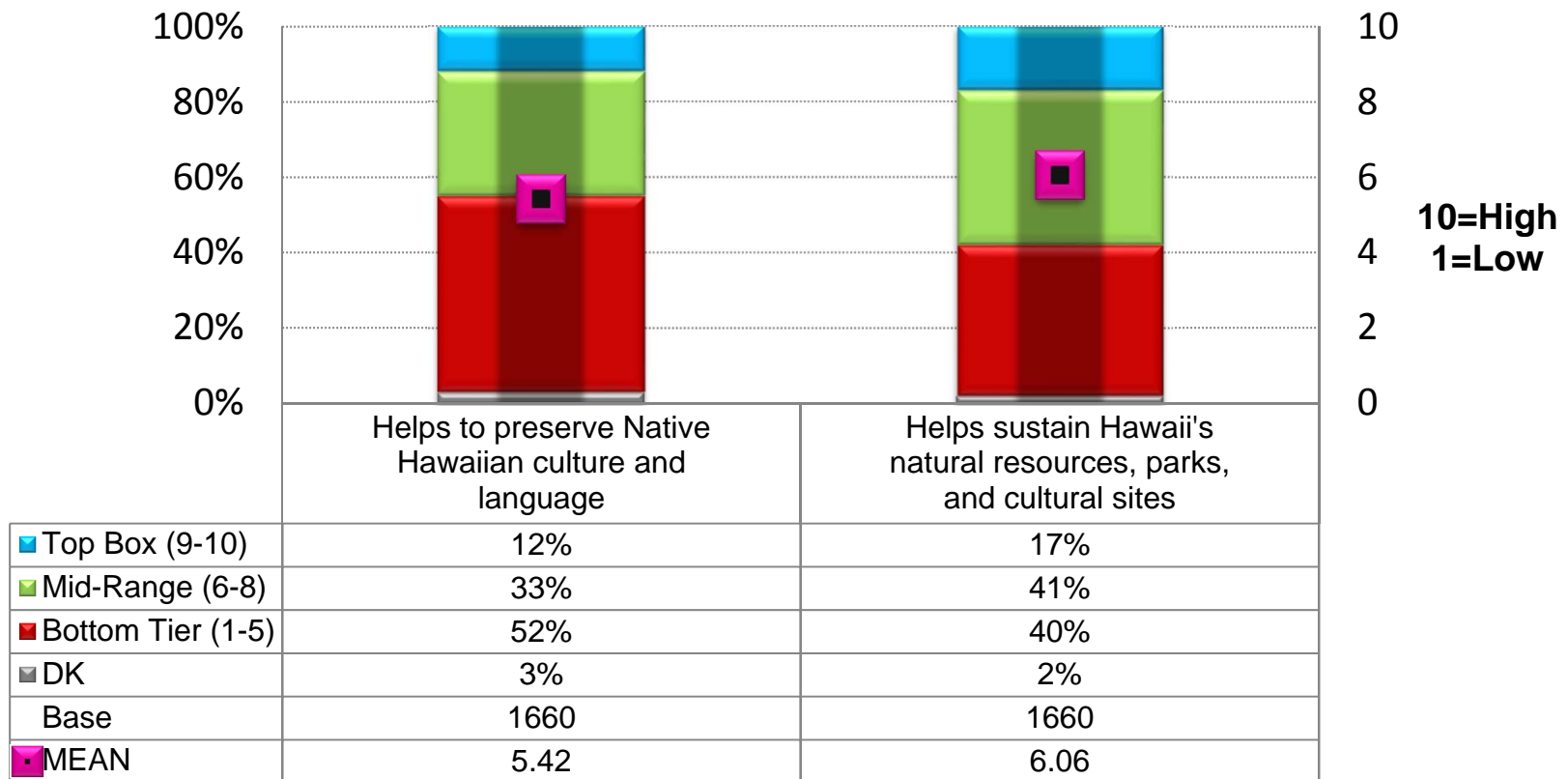


Tourism Benefits - Economic



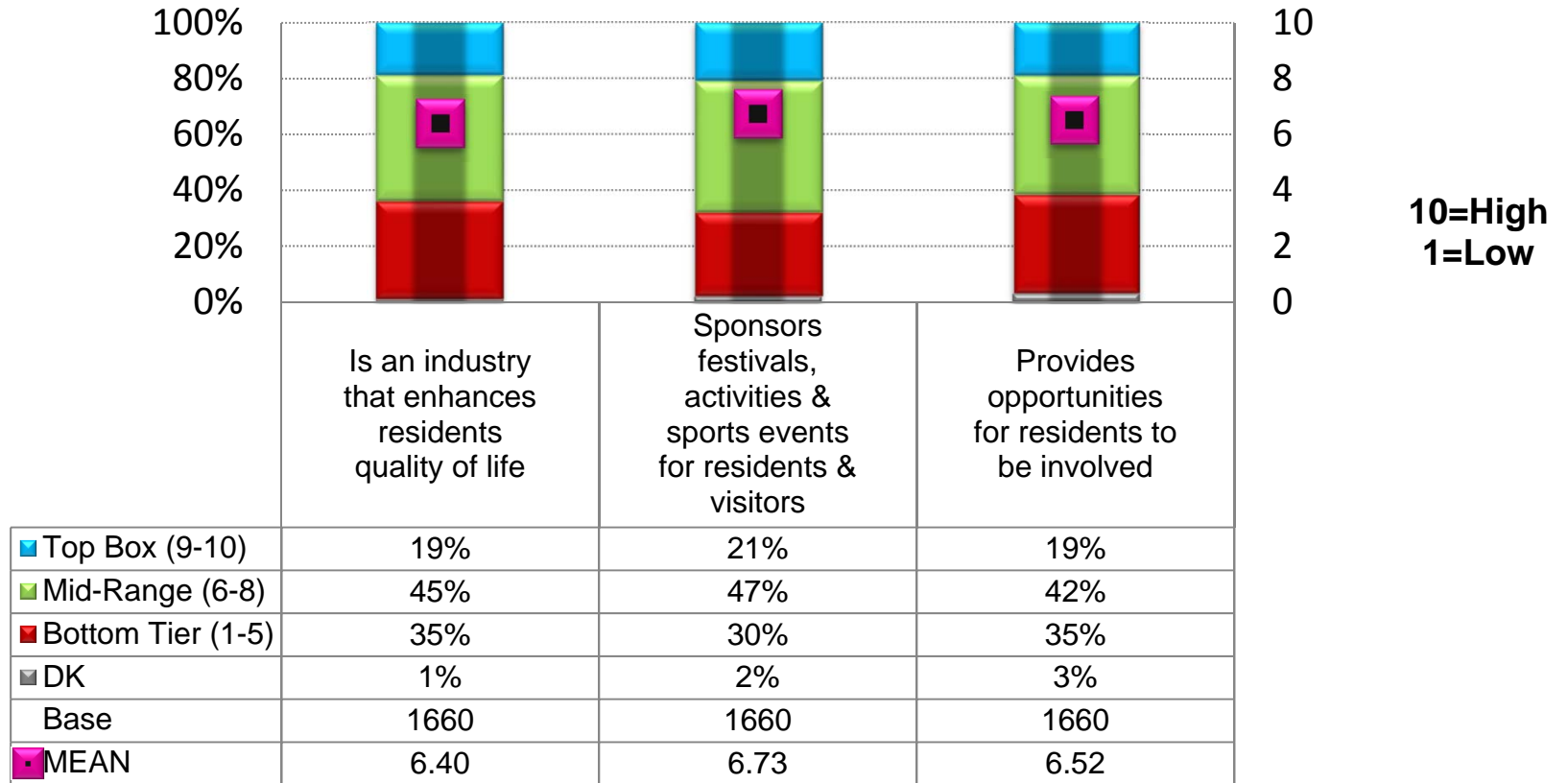
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

Tourism Benefits – Cultural/ Recreational



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?

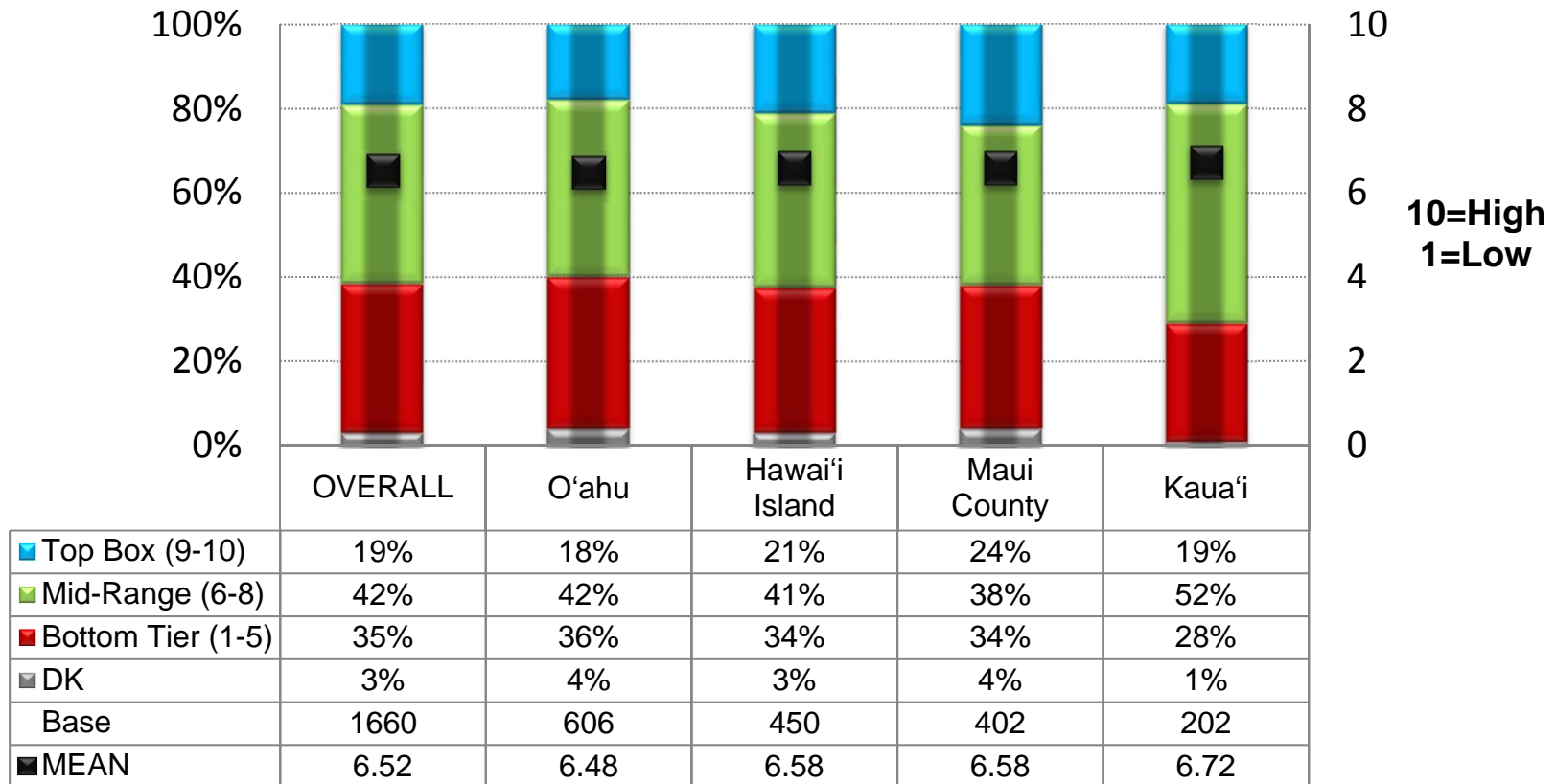
Tourism Benefits – Lifestyle



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?

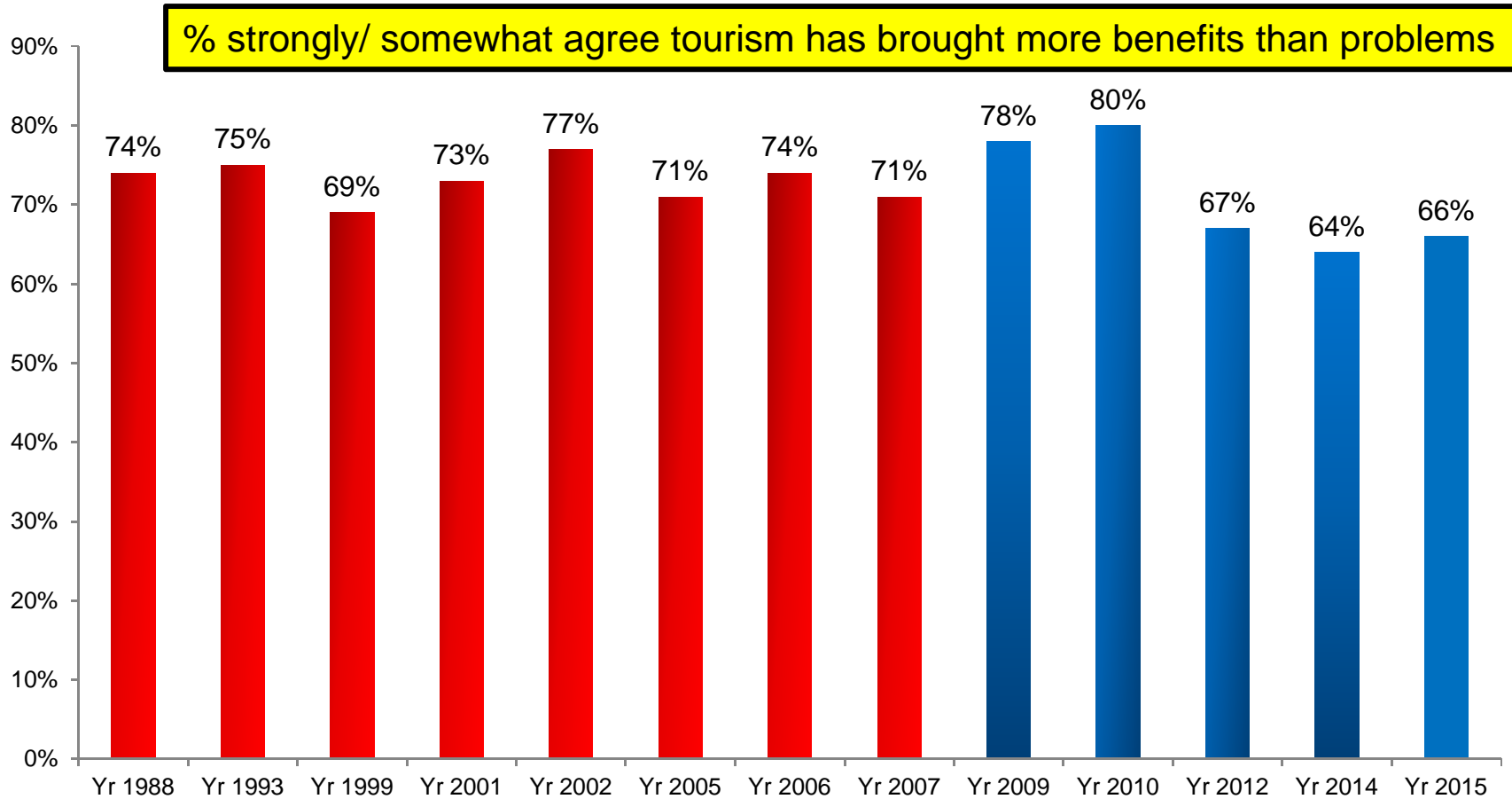
“Provides opportunities for residents to be involved”

By Island



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?

Tourism has brought more benefits than problems - *Overall*



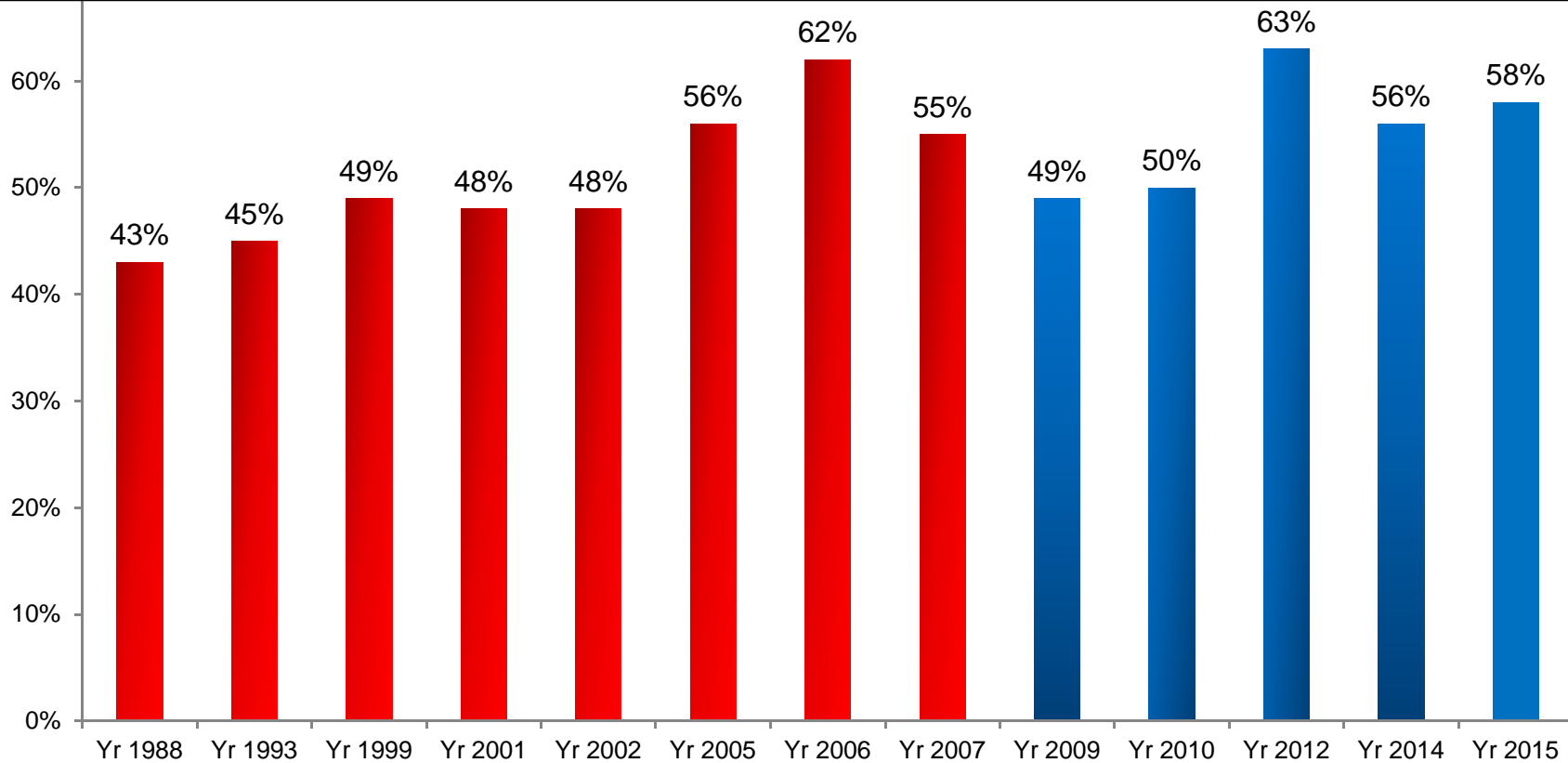
In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

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 - *Overall*

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

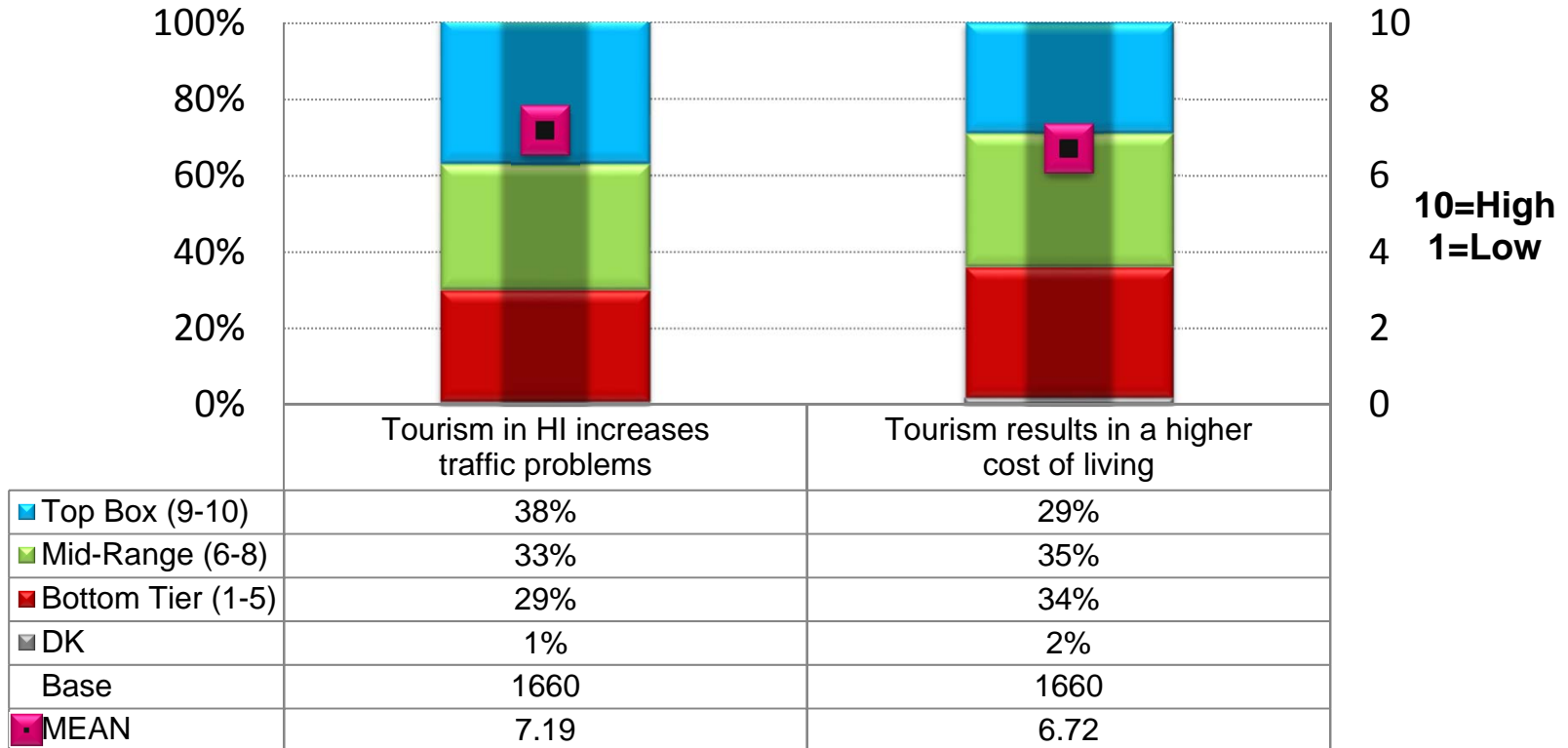


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

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...?

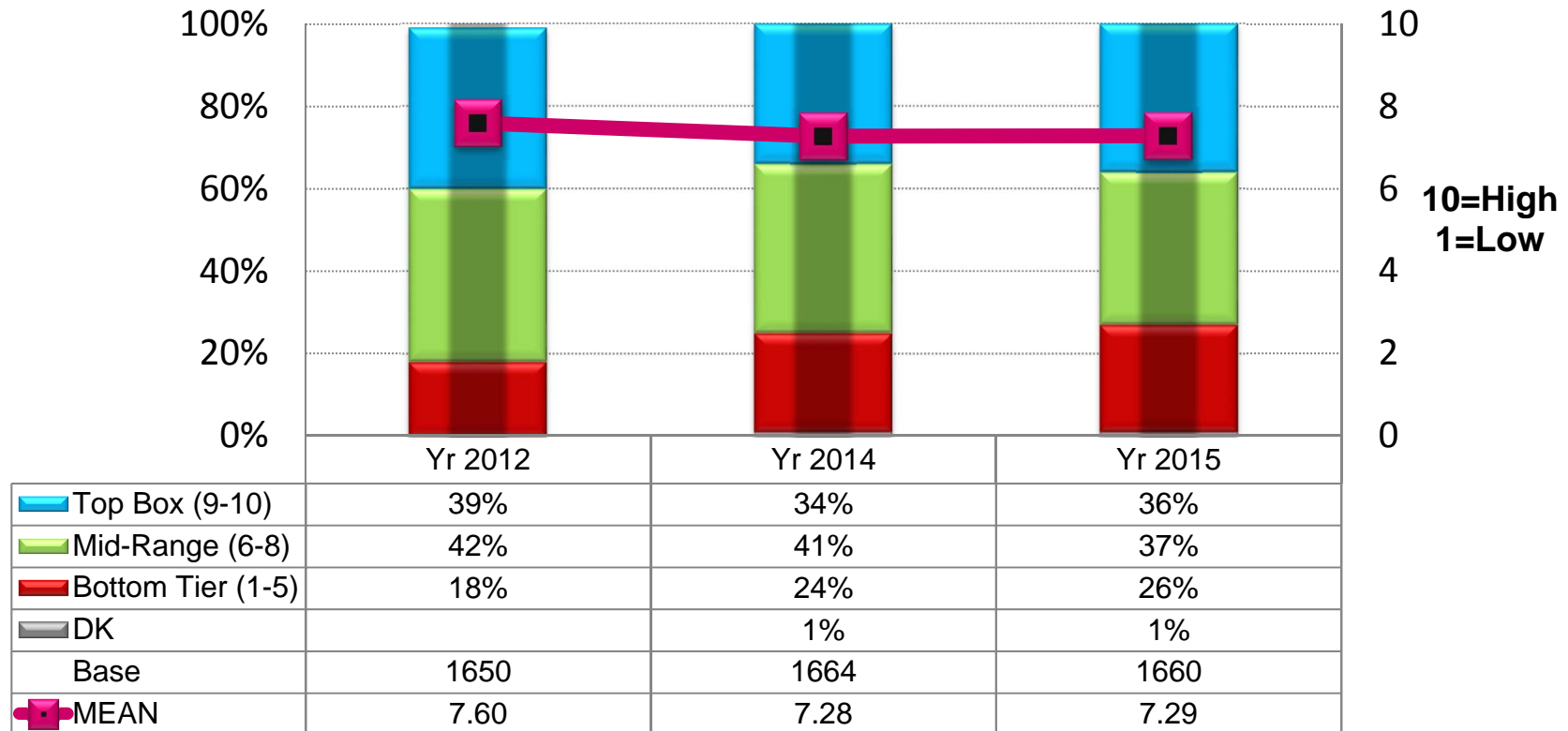


Traffic/ Cost of Living



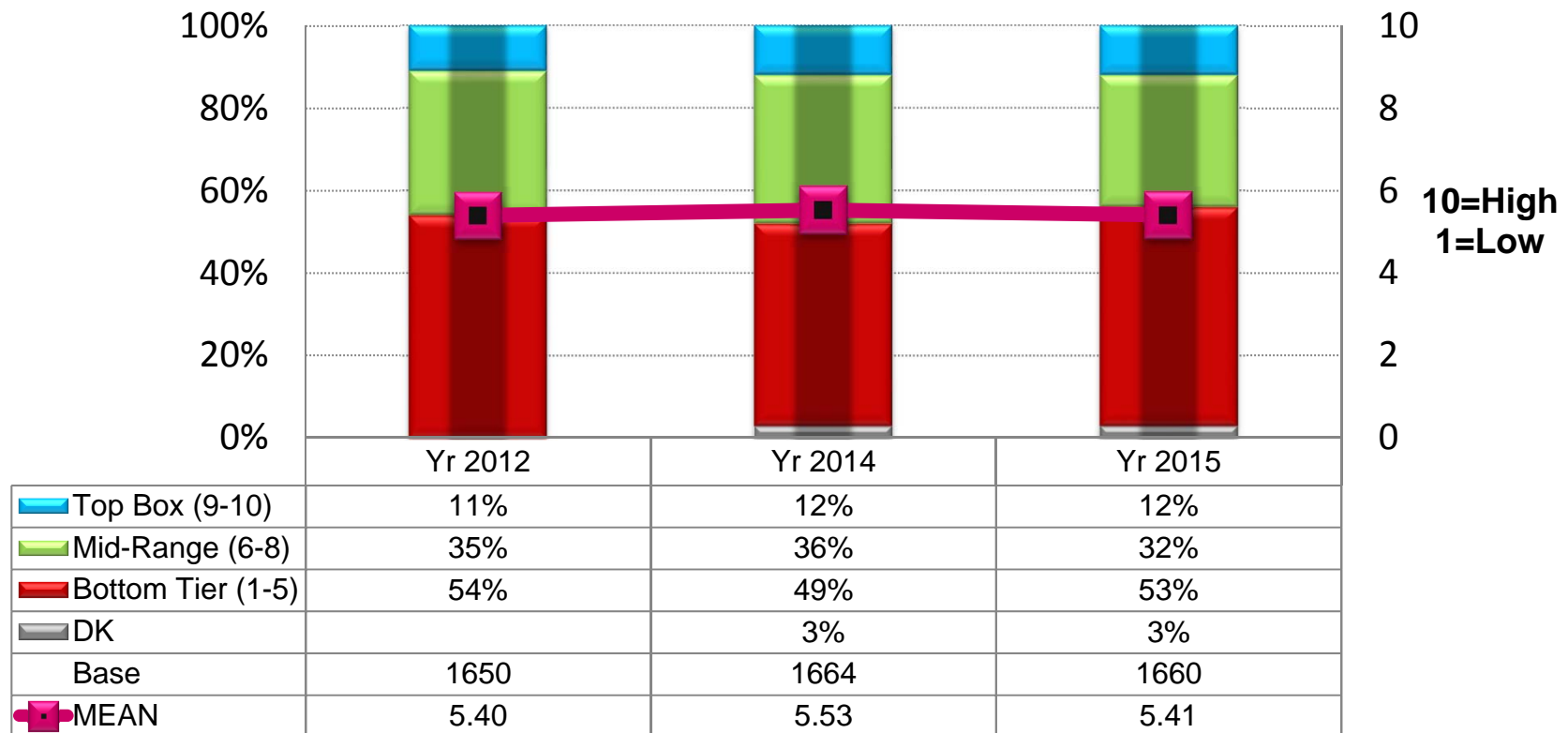
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

My Island's economy is too dependent on tourism– *Overall*



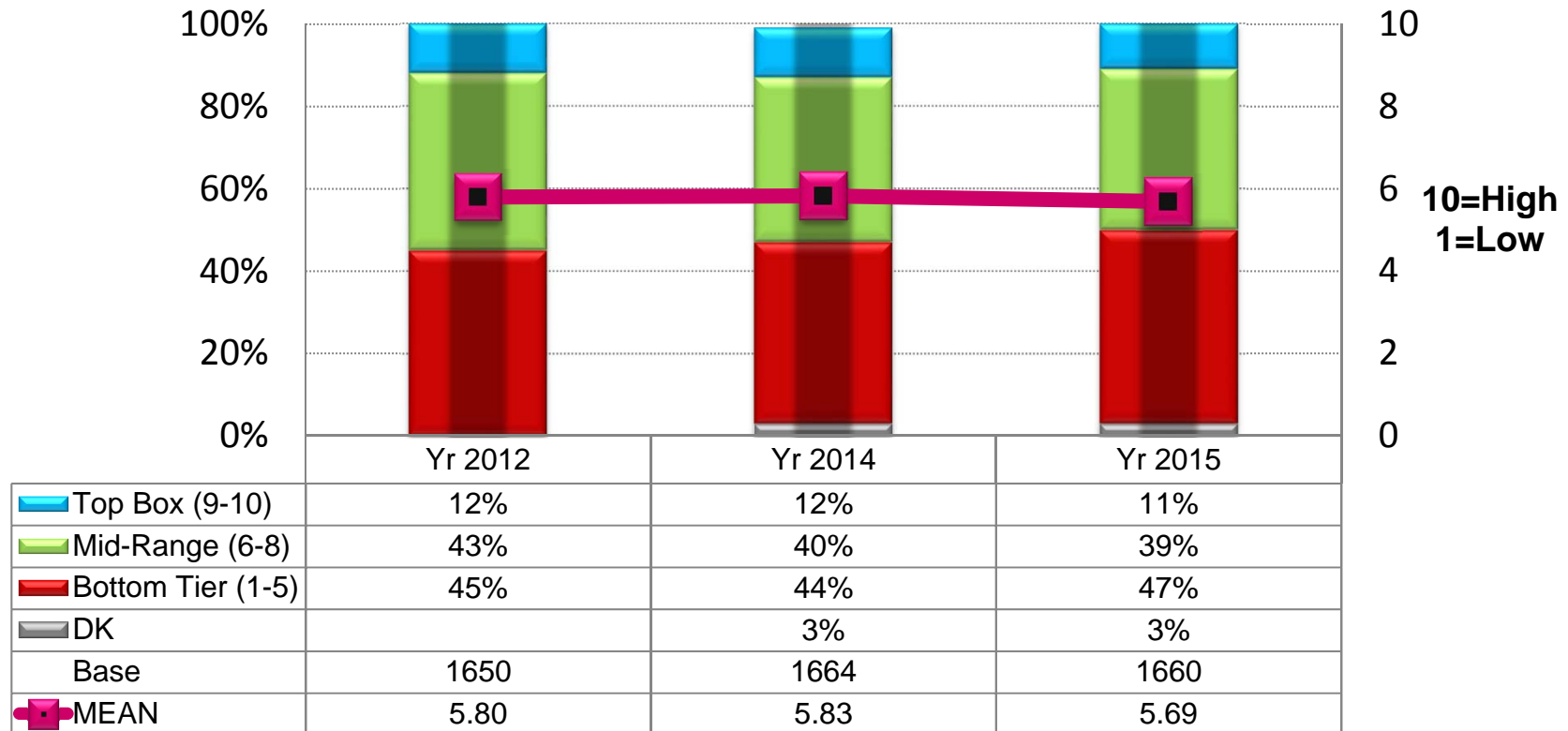
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Tourism currently presents Native Hawaiian culture in an authentic manner– *Overall*



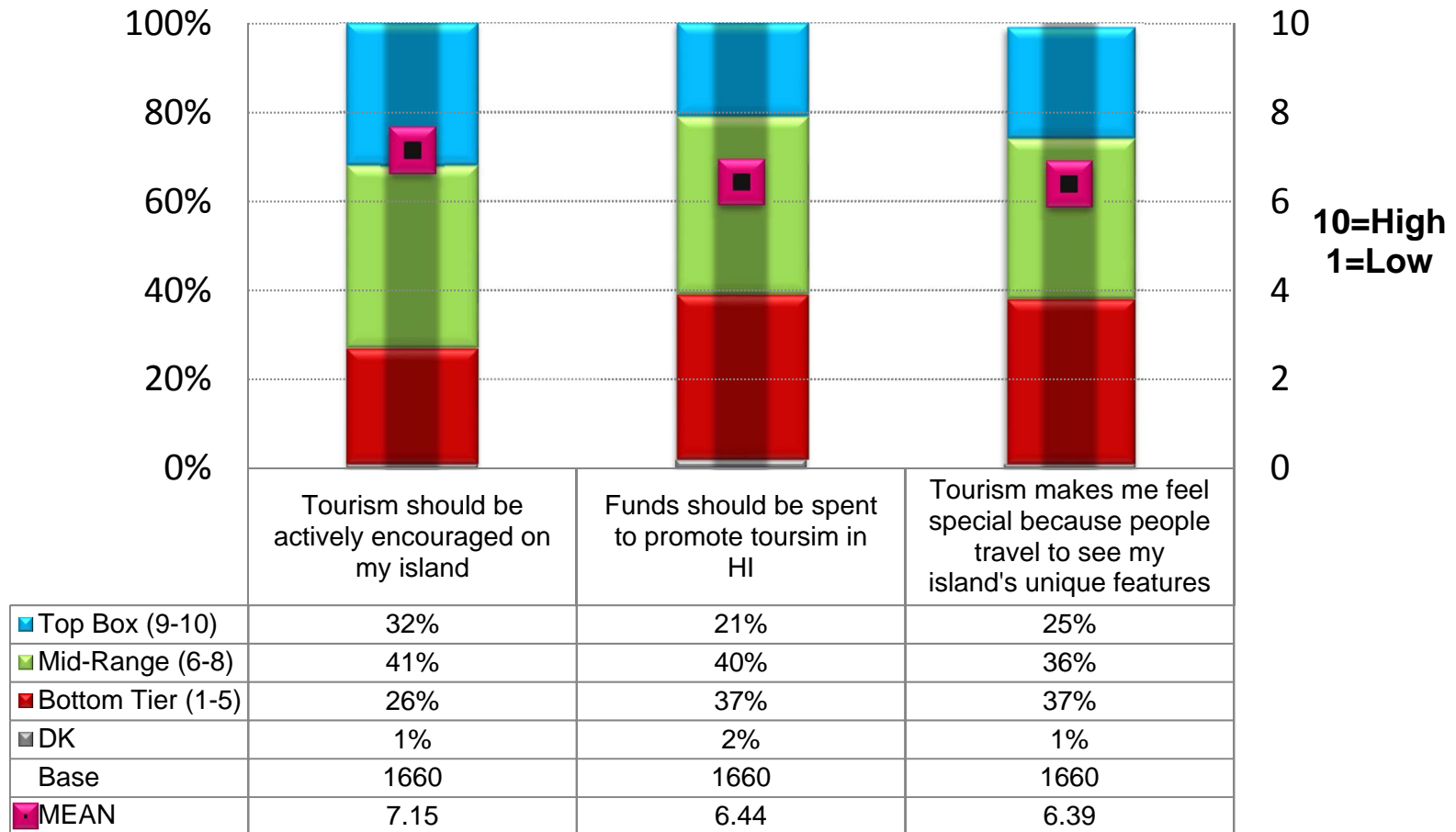
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Tourism is consistent with community values on this island – *Overall*



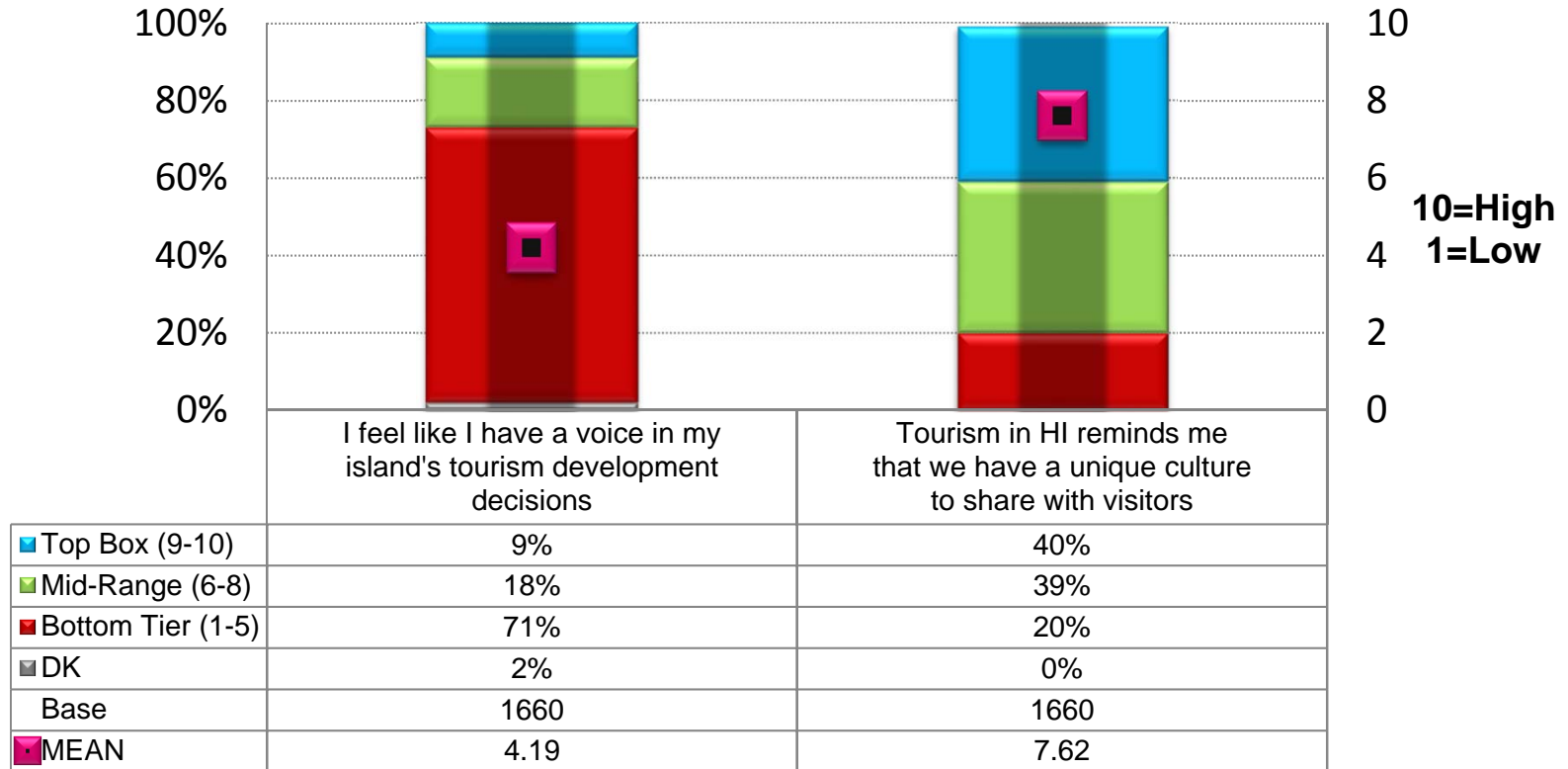
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Encouraged/ Funding/ Feel Special



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...?

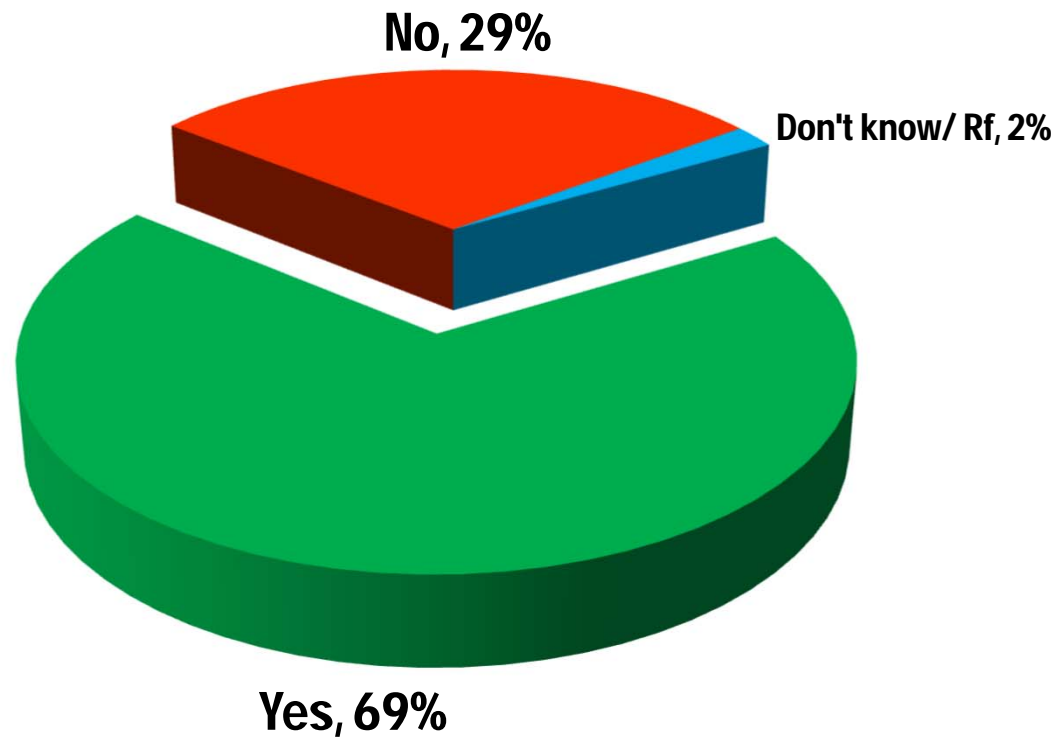
A Voice/ Unique Culture



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...?

HAWAI'I TOURISM AUTHORITY

AIDED NAME AWARENESS



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

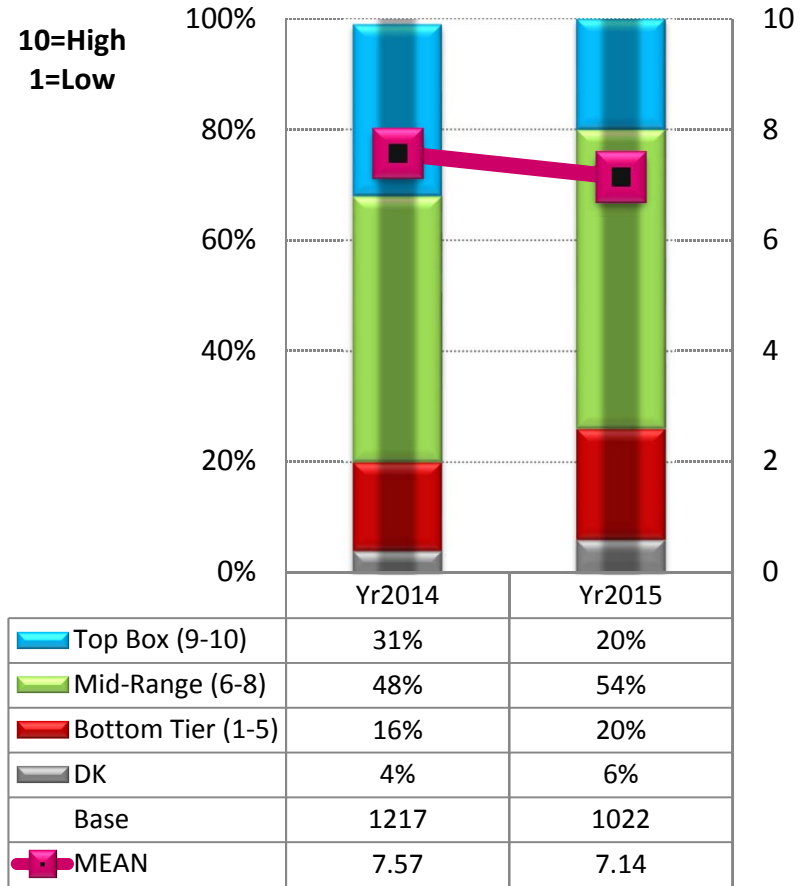
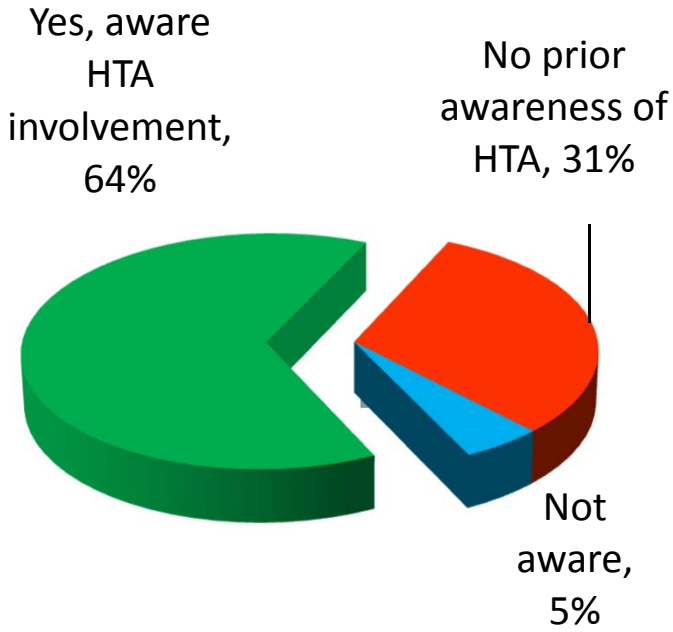
HTA - PERCEIVED DUTIES (UNAIDED)

	OVERALL	O'ahu	Hawai'i	Maui Cnty	Kaua'i
Promote tourism/ Hawai'i	75%	75%	74%	76%	76%
Don't know	12%	12%	14%	11%	13%
Manage/ coordinate tourism marketing	10%	10%	13%	9%	6%
Support, sponsor events/ organizations	9%	9%	11%	7%	10%
Market research/ data collection	9%	8%	12%	6%	6%
Bring money into the State/ benefit economy	8%	8%	11%	8%	11%
Assist tourists in need/ help in emergencies, crisis	8%	8%	10%	5%	8%
Regulates tourism industry	6%	7%	5%	2%	4%
Support, sponsor, promote- Hawaiian culture	6%	5%	5%	1%	6%
Taxpayer funded/ spending too much	3%	4%	2%	1%	3%

Q. What do you think the HTA does?



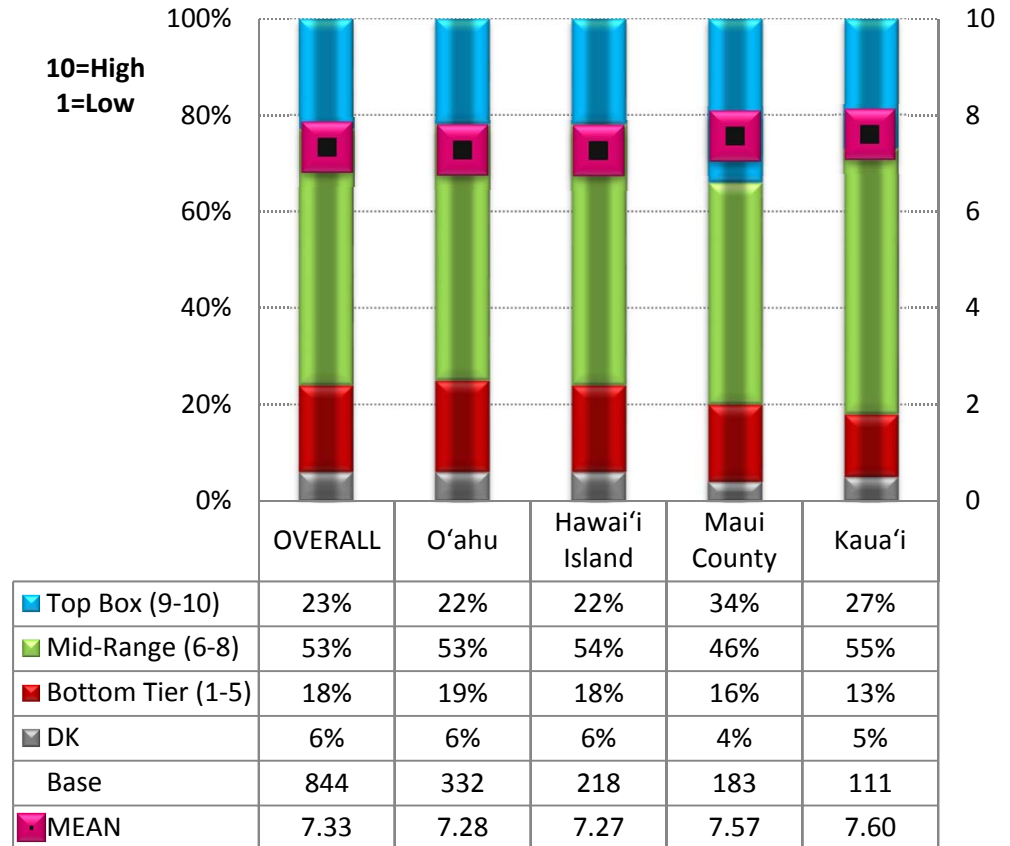
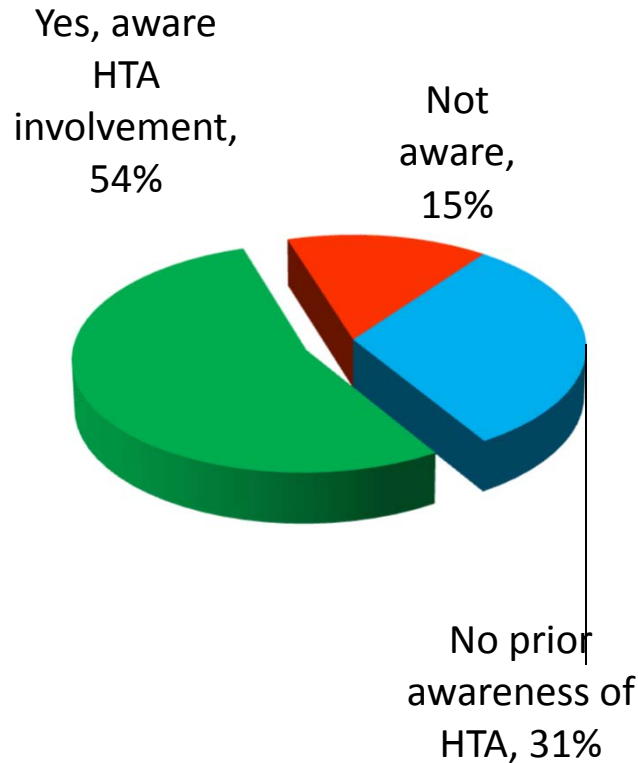
Marketing and promoting tourism in Hawai'i



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role in:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

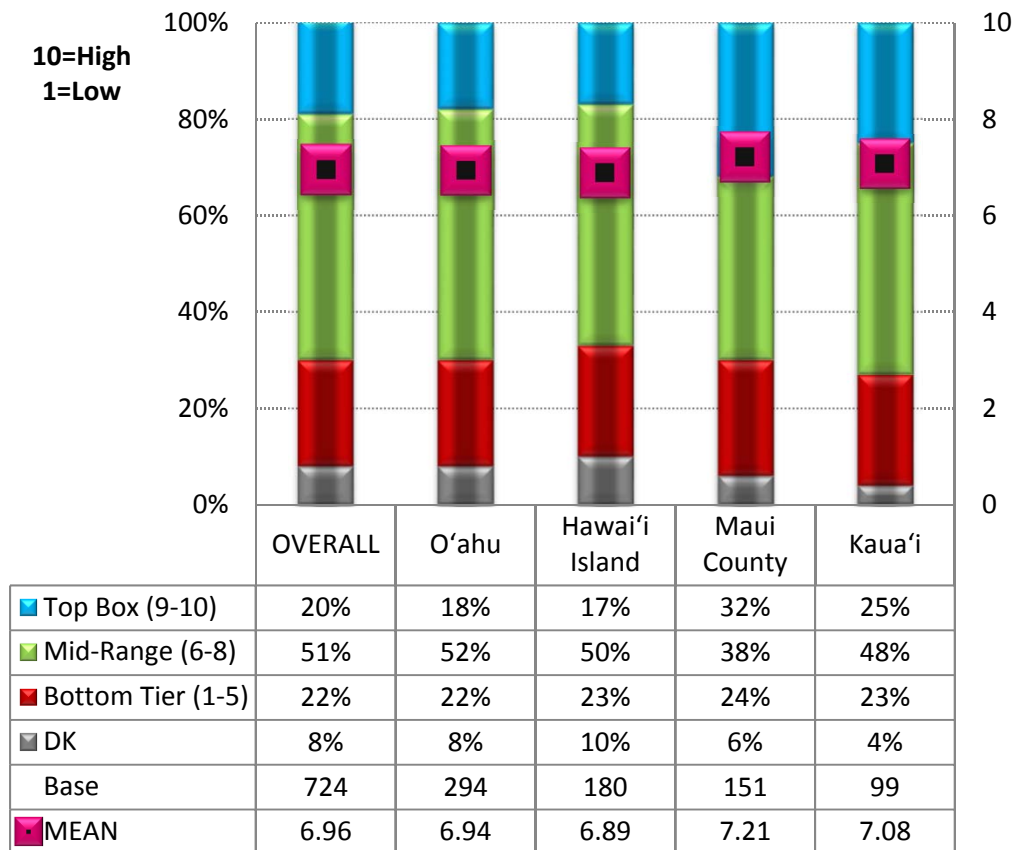
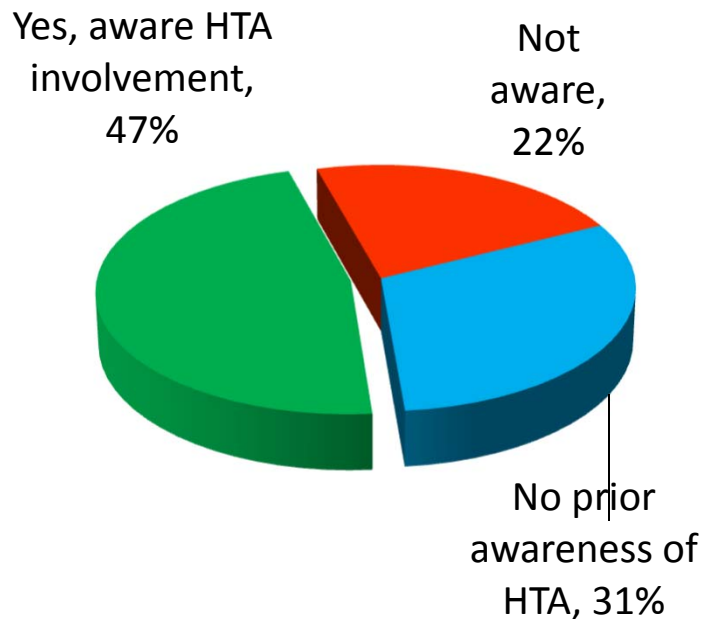
Leading the tourism industry in Hawai'i



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role in:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

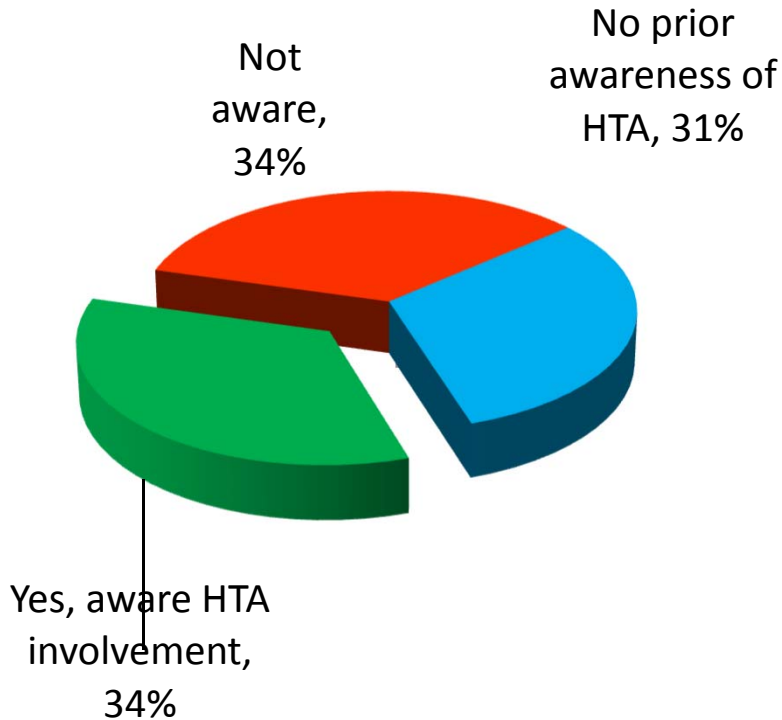
Setting tourism policy and direction with the goal of contributing to the ongoing, sustainable growth of Hawai'i's economy



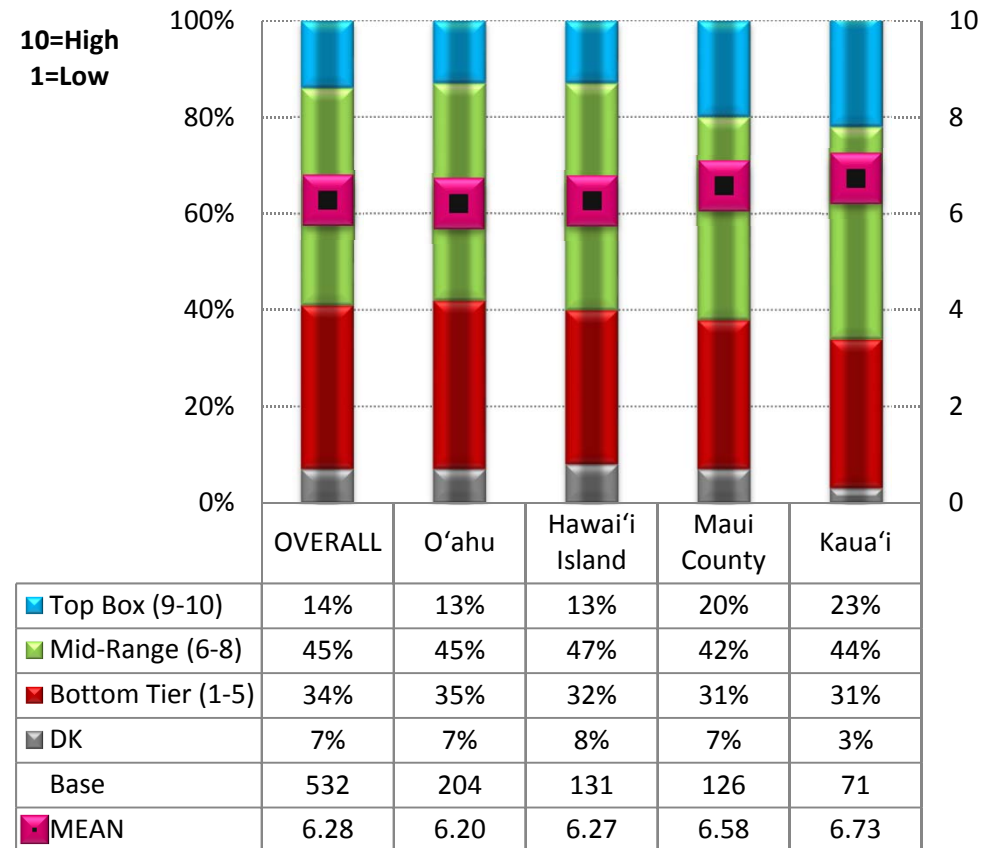
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Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

Communicating with and listening to Hawai'i residents concerning tourism-related issues and concerns

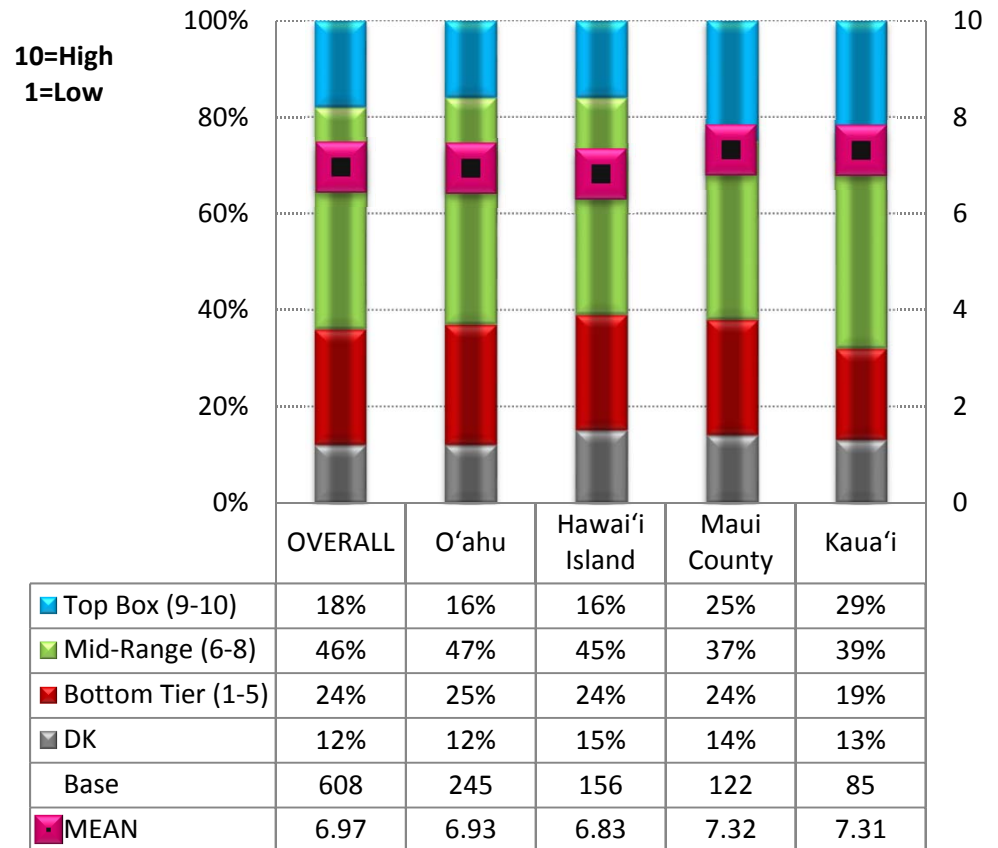
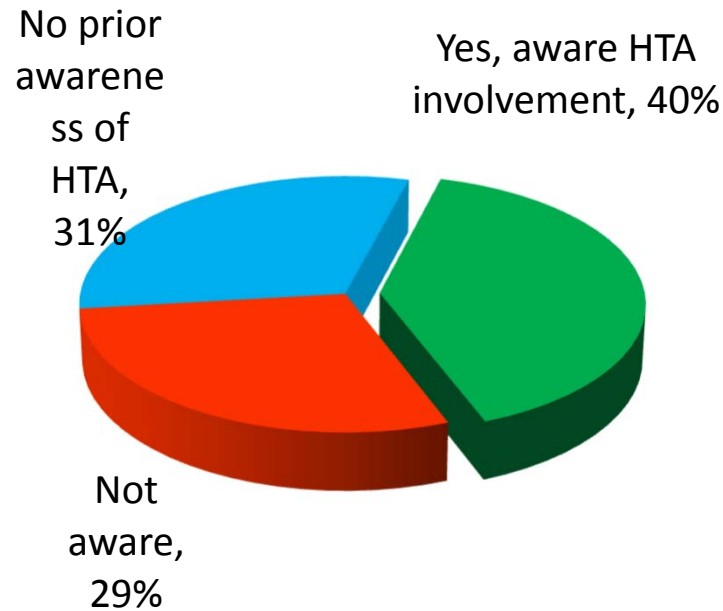


Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role it:



Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

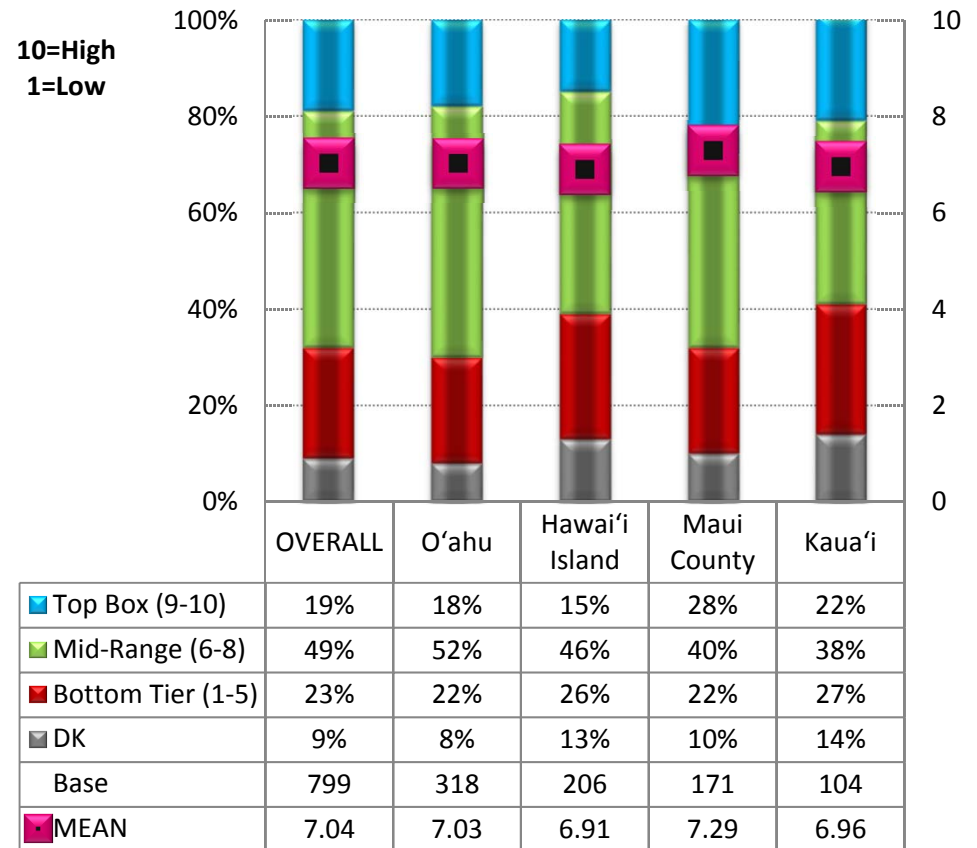
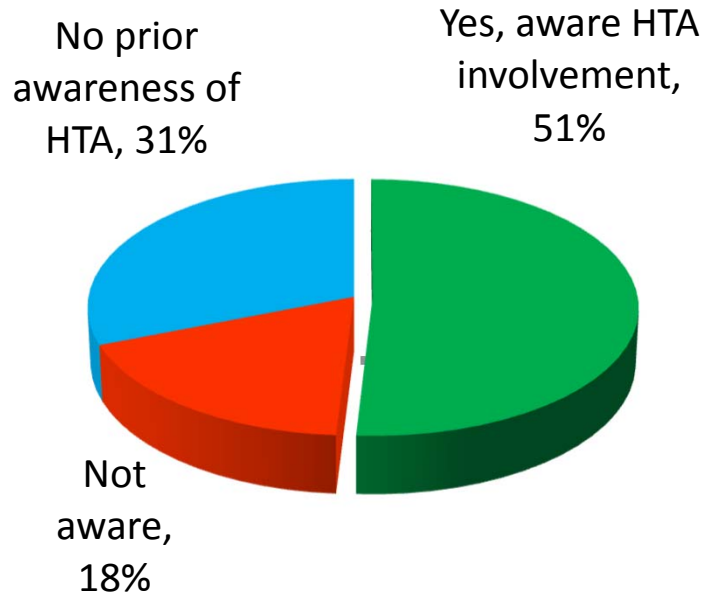
Developing and implementing the Hawai'i Tourism Strategic Plan



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role in:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

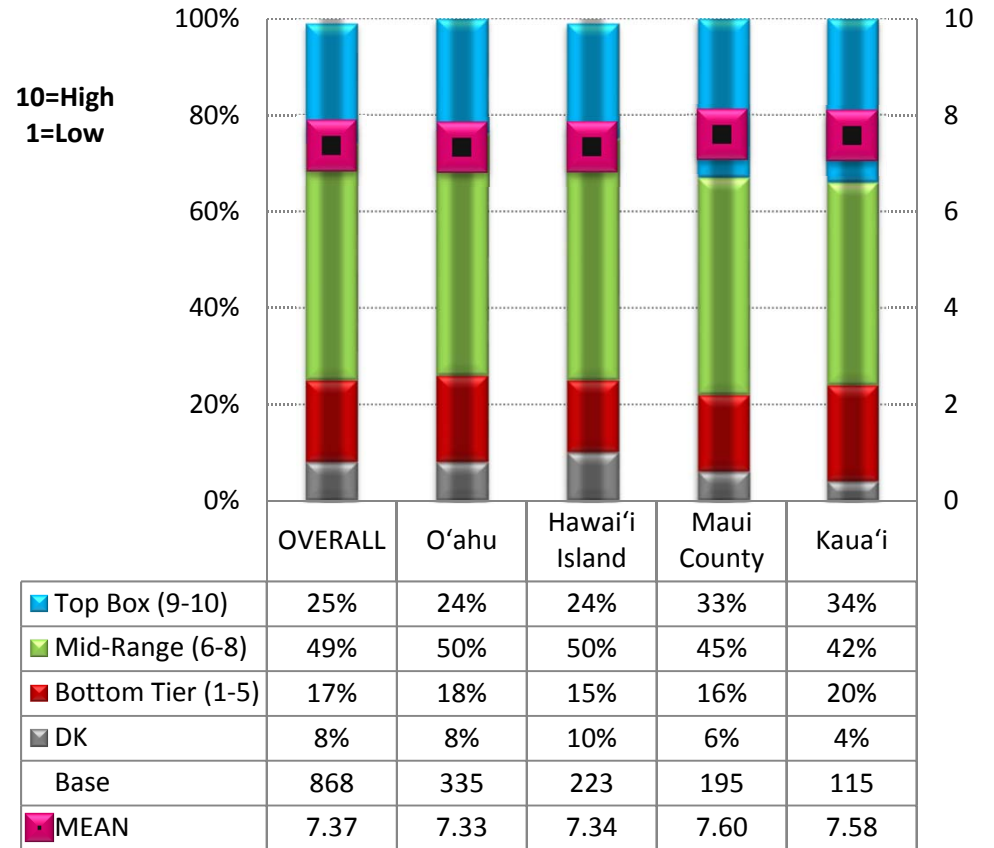
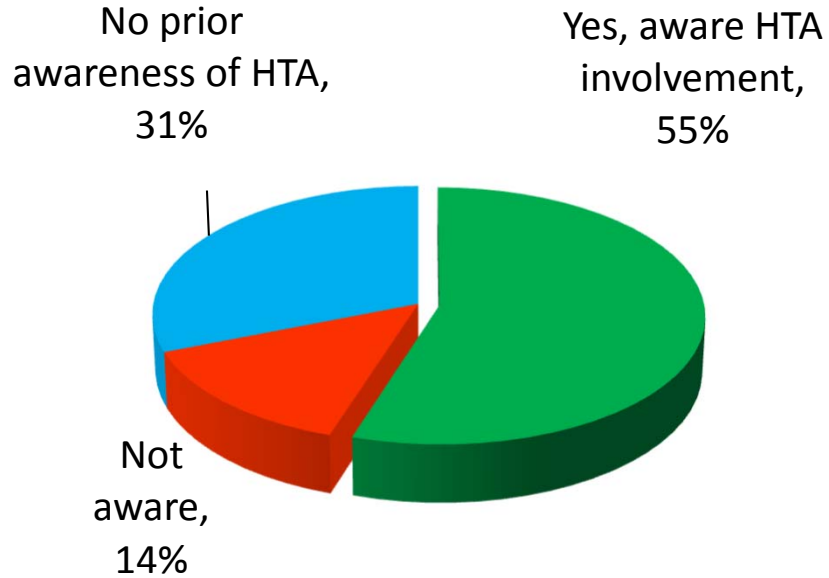
Coordinating tourism-related research, planning, promotional, and outreach activities with companies in the visitor industry



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role in:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

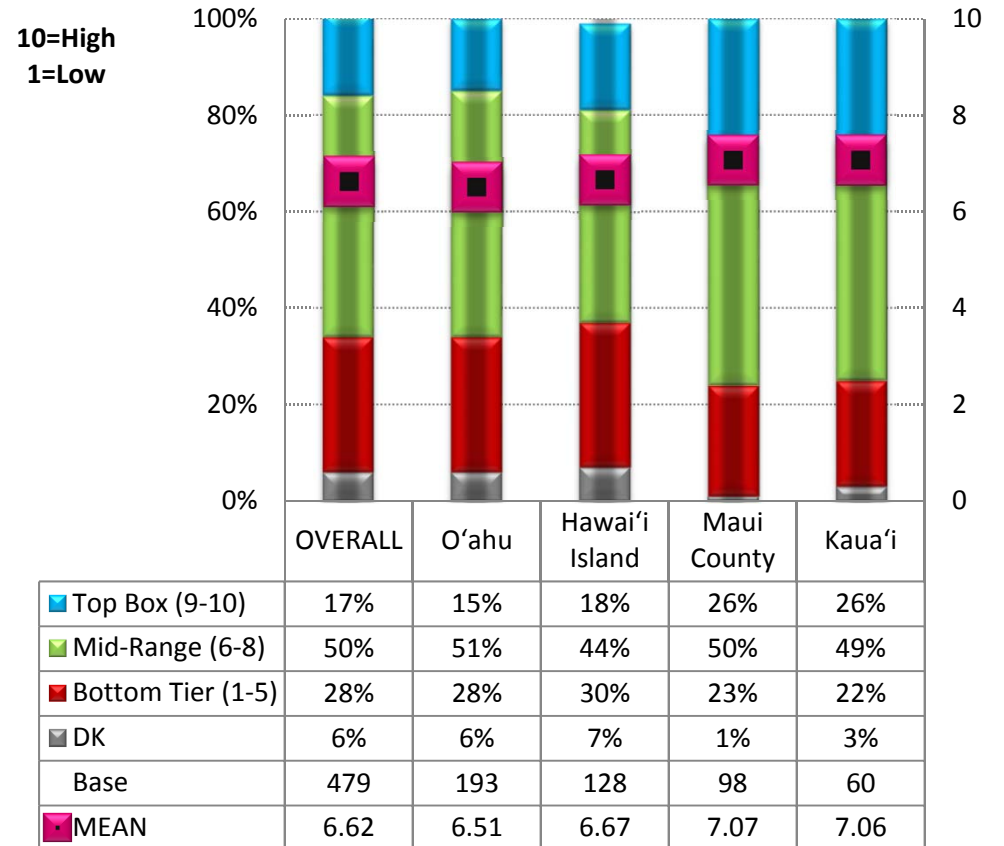
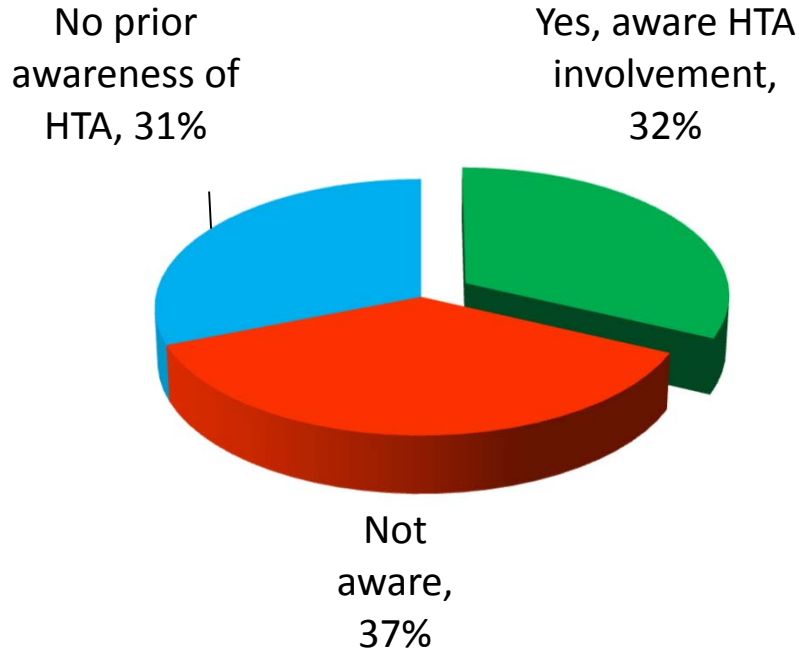
Enhancing the competitiveness of Hawai'i as a destination



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role in:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

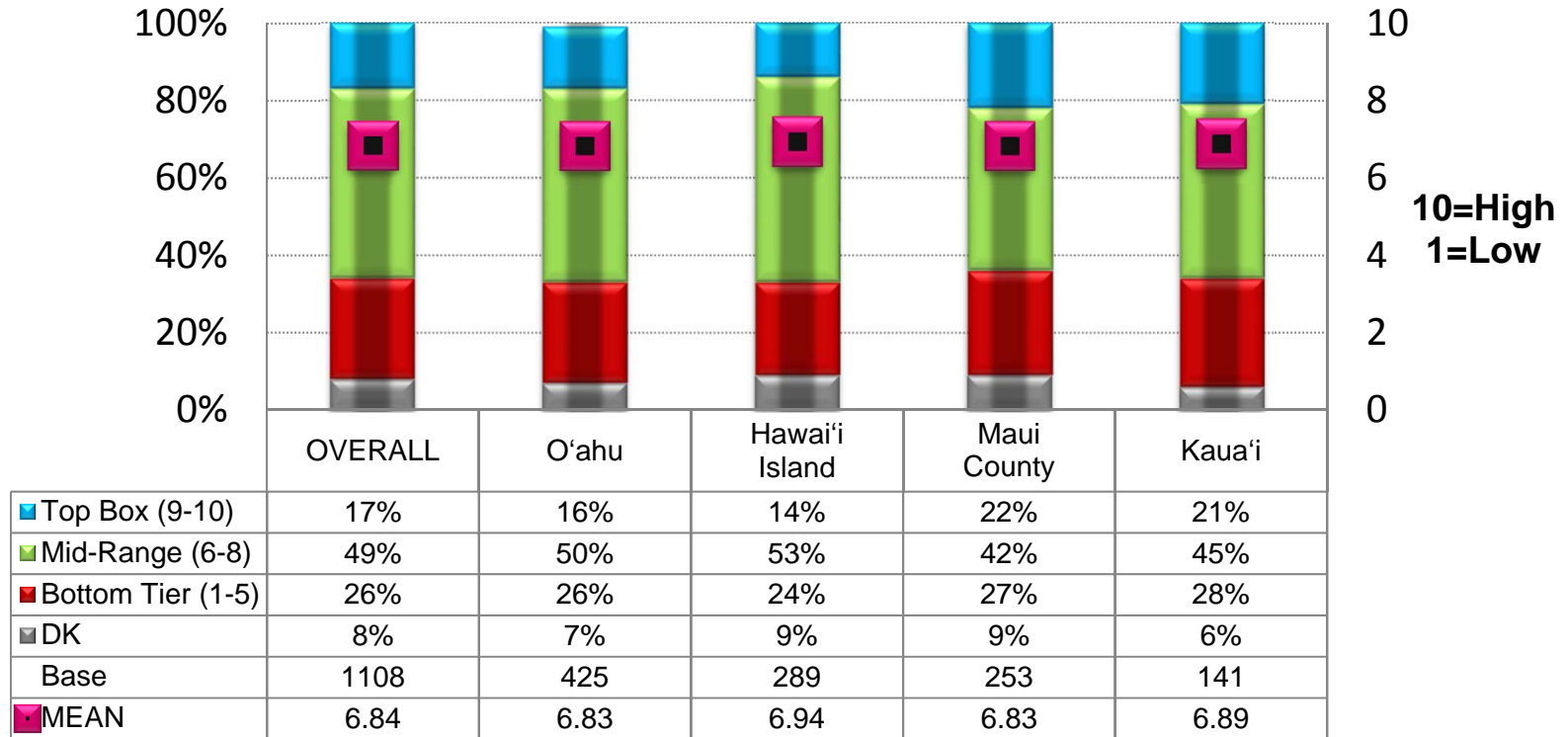
Balancing the needs of the residents with the expectations of visitors and protecting the resources of Hawai'i



Q. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for and has an important role it:

Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

HTA FAVORABILITY SCORE



Q. Using a 10-point scale where 10 means extremely favorable and one means not favorable at all, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall and their work to promote Hawai'i tourism:

Mahalo