

HTA Resident Sentiment Survey 2020 Highlights



Prepared for the:
Hawai'i Tourism Authority: Project #5745
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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 16 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 of the **impact of the COVID-19 pandemic** and re-opening Hawai'i to outside 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 of per the latest State Census from the state Department of Business, Economic Development and Tourism. The sample includes both landline (30%) and cellular (22%) phones; and an online component (48%)

Statewide sampling produced a total of **n = 1,709** respondents as follows:

- O'ahu: 670
- Hawai'i Island: 460
- Maui County: 378
- Kaua'i: 201

Methodology

- A mixed methodology used was for this survey, including a combination of Computer Assisted Telephone Interview (CATI) and online surveys. Just over half (52%) respondents completed the survey via telephone and the remainder (48%) completed the online survey.
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates:
September 16 through October 25, 2020

What's the Big Idea?

1

Resident sentiment toward Hawai'i's visitor industry has weakened in 2020 due to an unparalleled major shock from the COVID-19 pandemic in which residents associate the visitor industry with increased health risks. Overtourism concerns also linger.

2

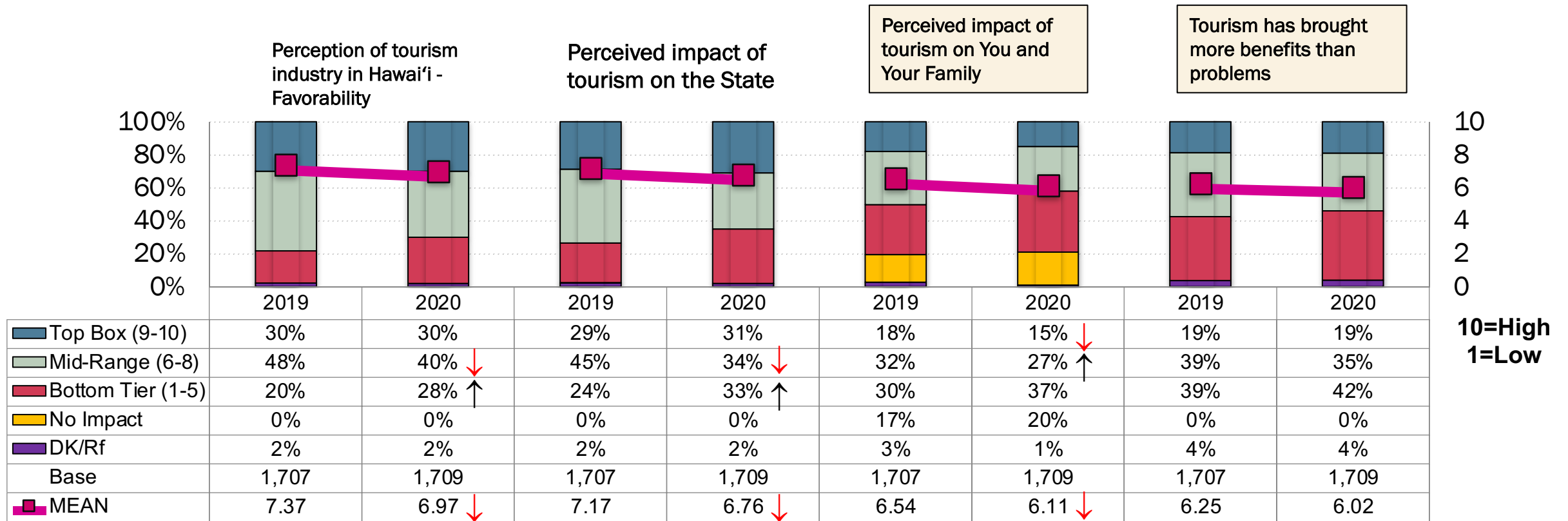
As a result, residents are largely hesitant to re-open Hawai'i to outside tourism and promoting/encouraging travel to the state at this time.

3

To improve resident sentiment – a key part of regenerative growth for the state's visitor industry:

- Economic/Social benefits
- Cultural/Community benefits
- Address negative impacts of tourism (traffic, cost of living)
- NEW: Responsible Re-opening & Quarantine enforcement

Key Resident Sentiment Indicators



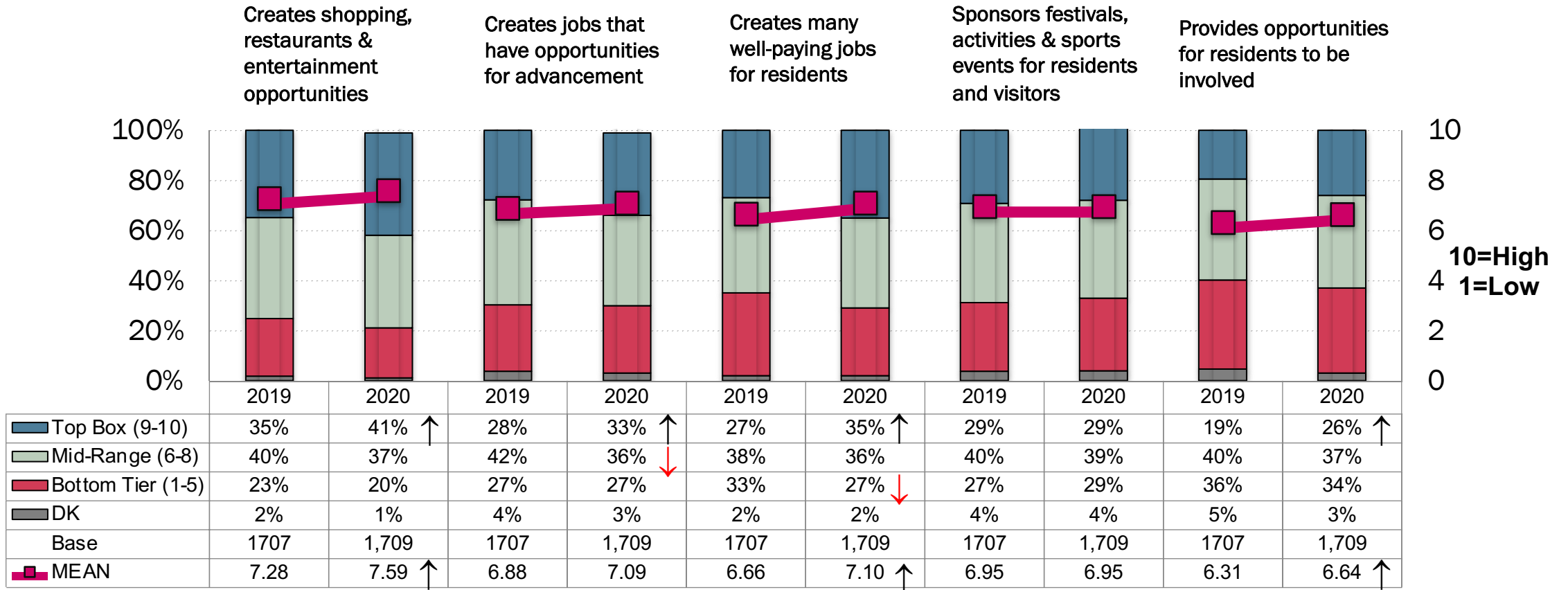
Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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.4.1 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?

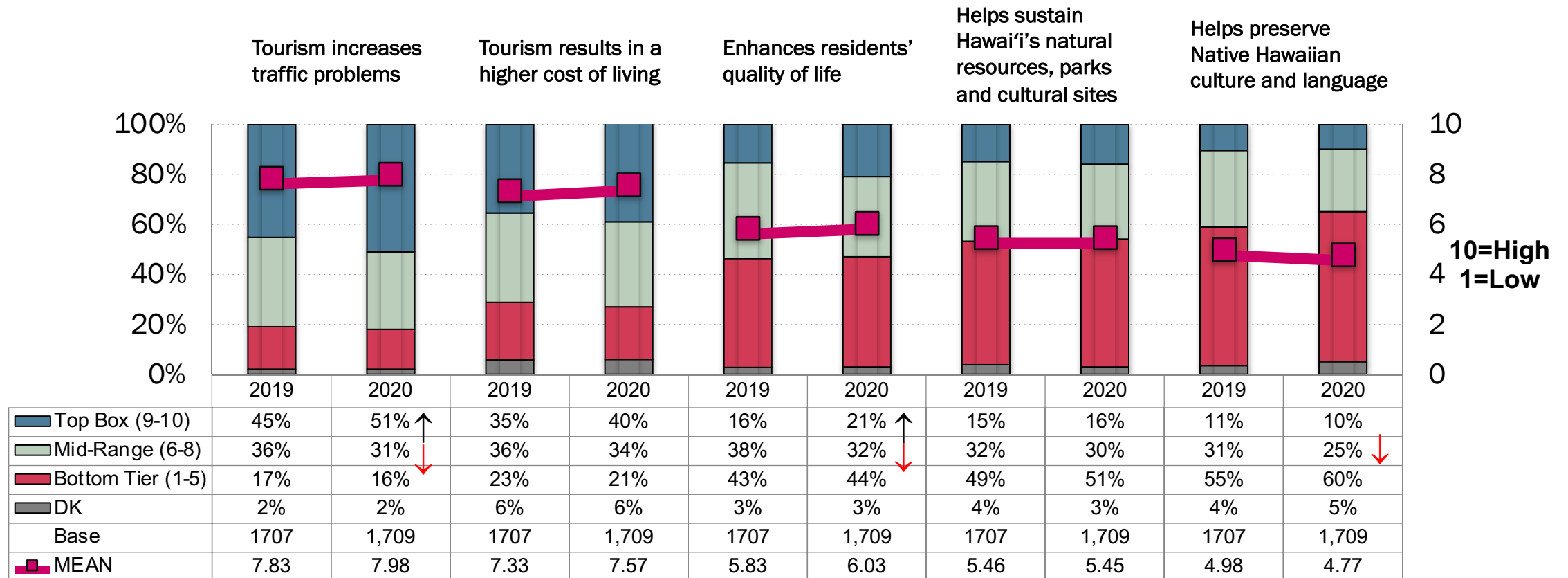
10=High
1=Low

Impact of Hawai'i Tourism



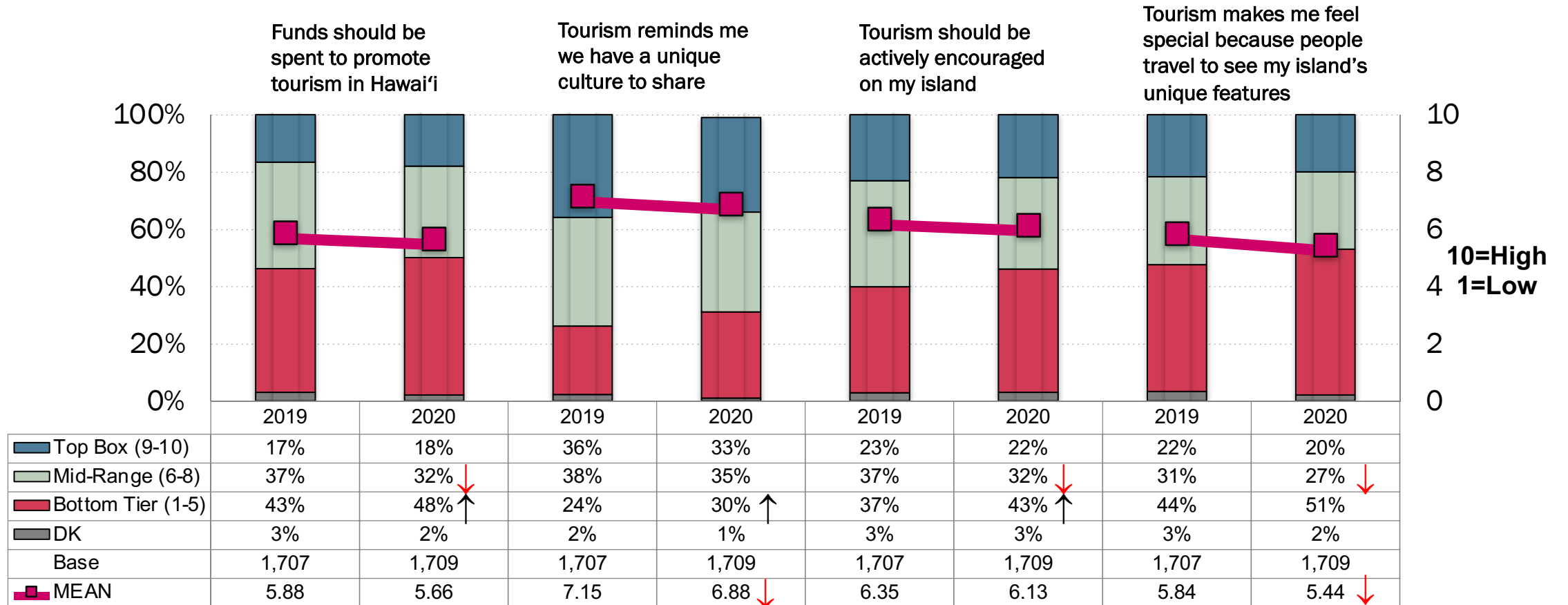
Q3. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

Impact of Hawai'i Tourism



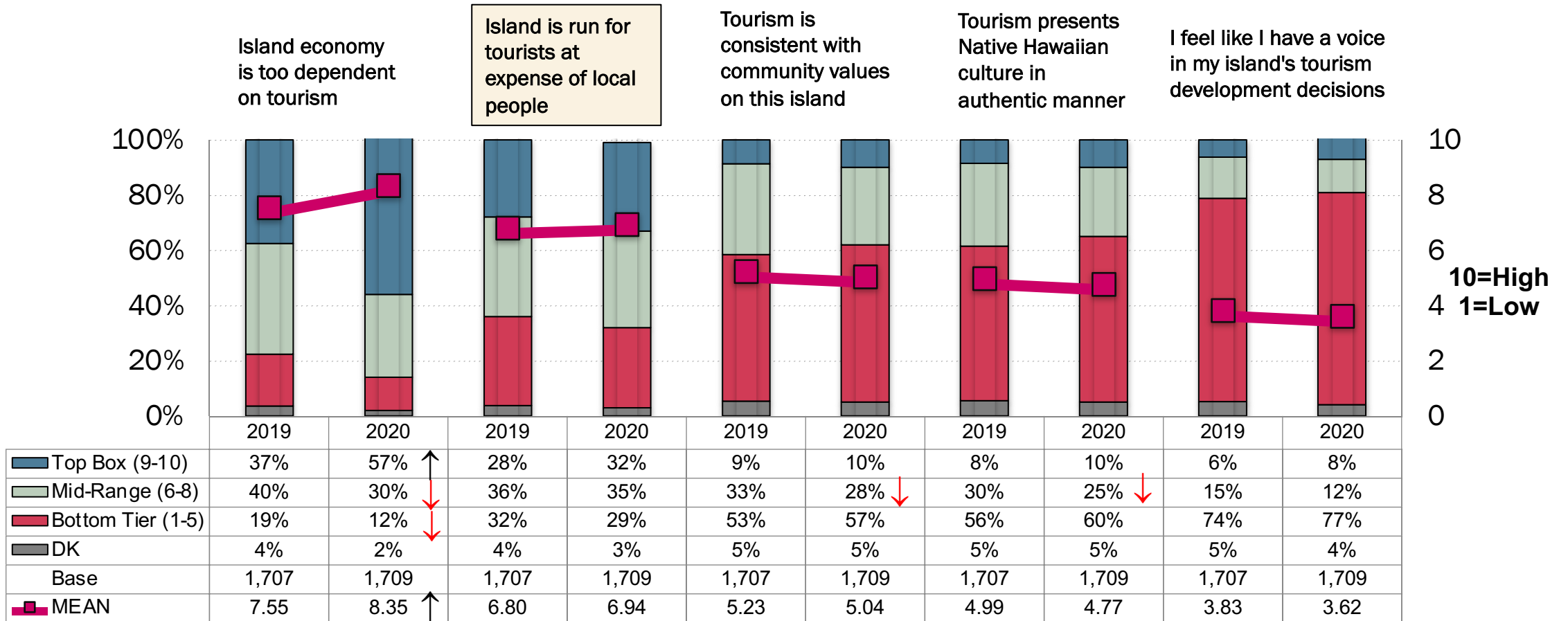
Q3 & Q4. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

General Perceptions



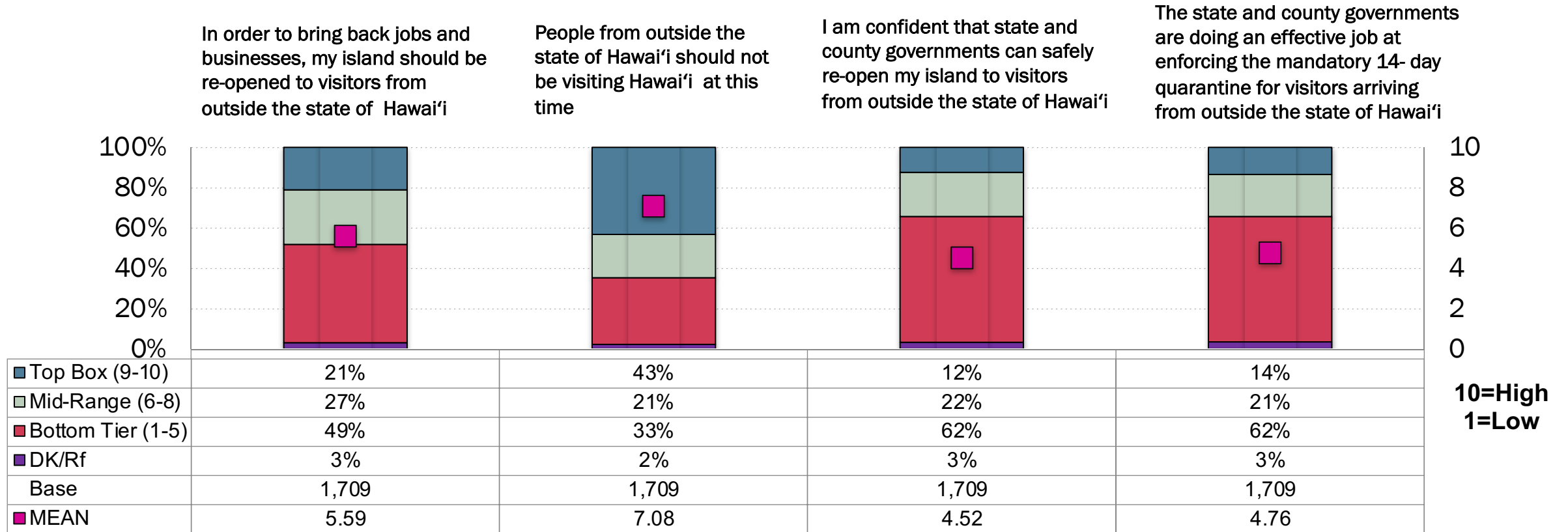
Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that ...

General Perceptions



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 ...

Resident Sentiment Towards Re-Opening Hawai'i to Tourism

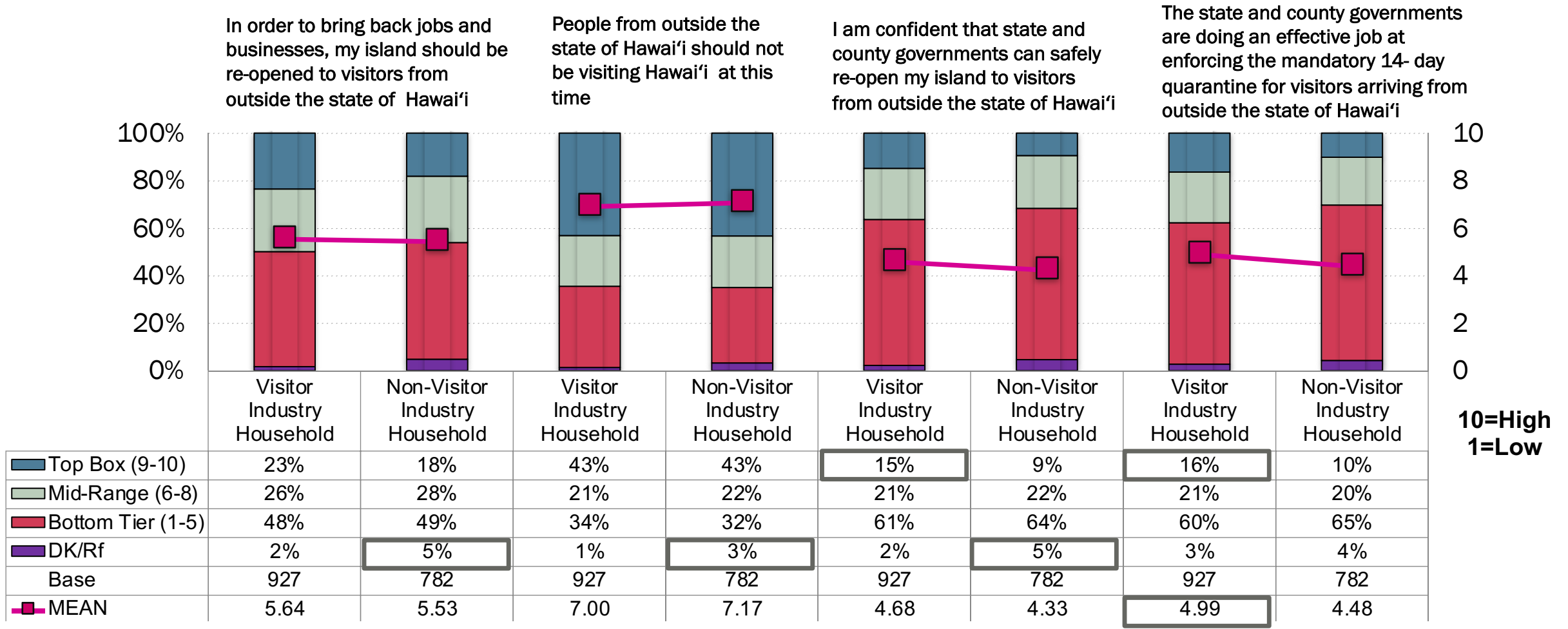


Q6. Still using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, do you agree or disagree that ... [INSERT].

Source: HTA 2020 Resident Sentiment Study, fielded September 16 through October 25, 2020.

Resident Sentiment Towards Re-Opening Hawai'i to Tourism

By Visitor Industry Household vs Non-Visitor Industry Household

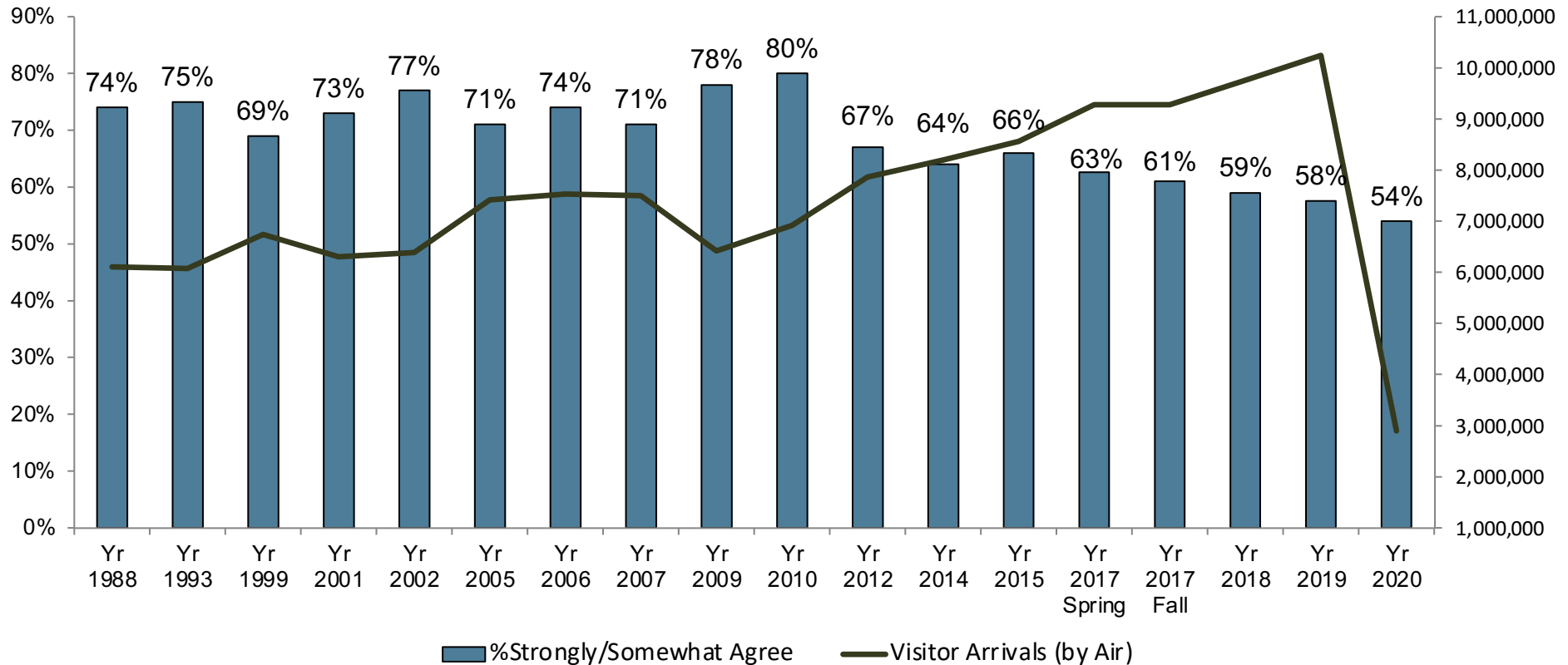


Q6. Still using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, do you agree or disagree that ... [INSERT].
Source: HTA 2020 Resident Sentiment Study, fielded September 16 through October 25, 2020.

“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)

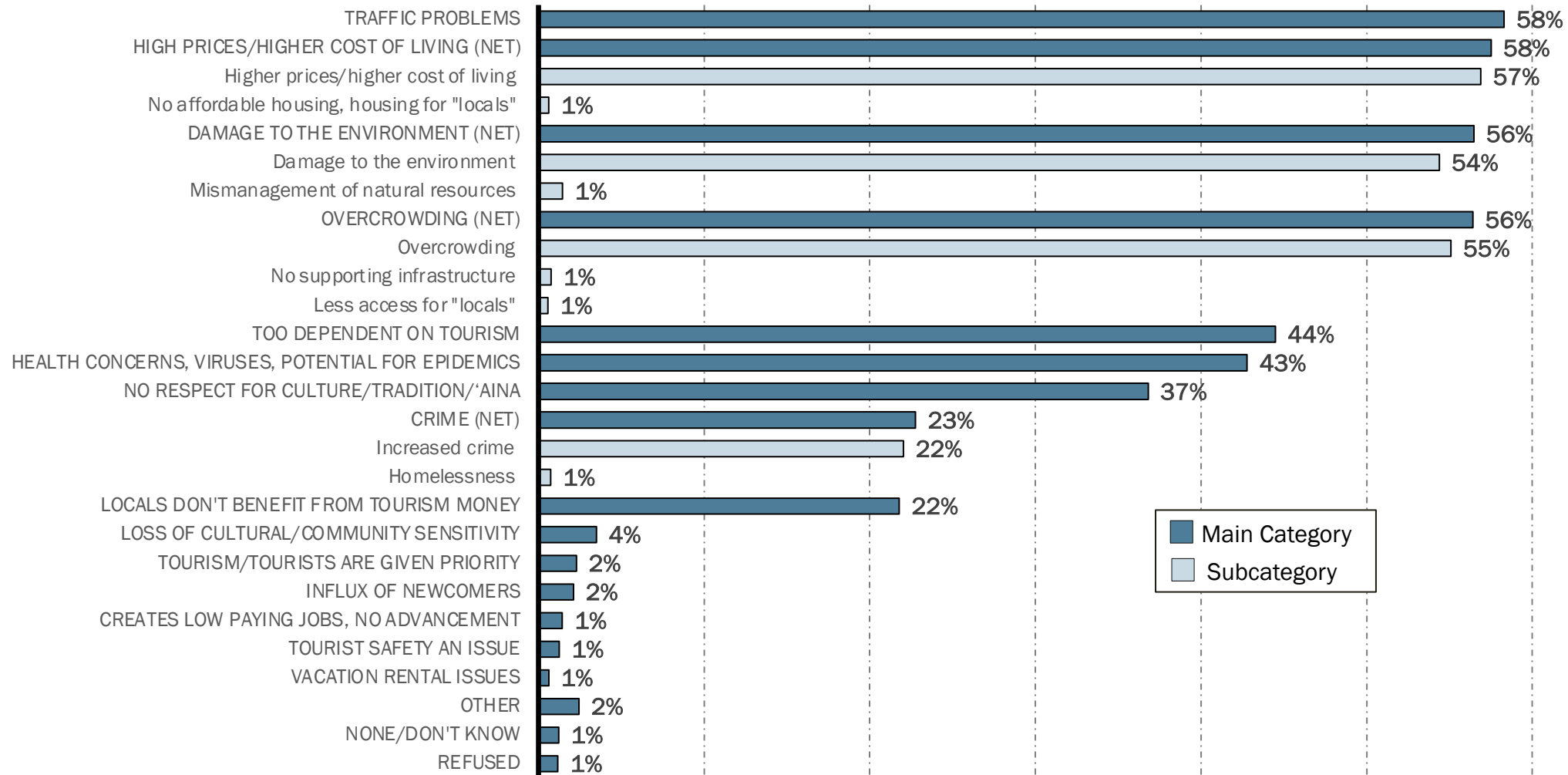
Annual Visitor Arrivals



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 (2020 only)

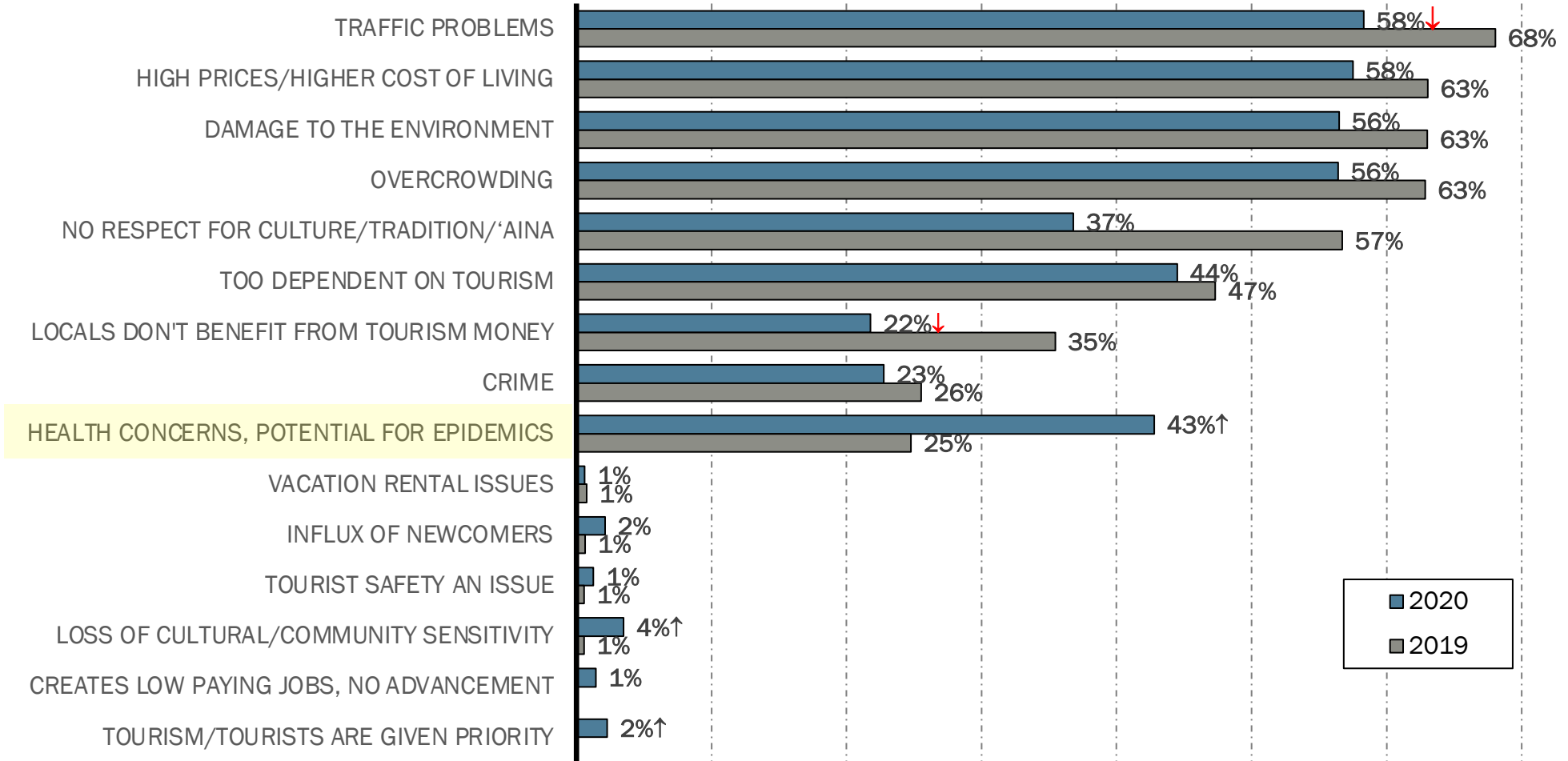
(According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 734
 Q5a. In your opinion, what problems do you think tourism has created in Hawai'i?

Problems Created by Tourism in Hawai'i (2020 vs. 2019)

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

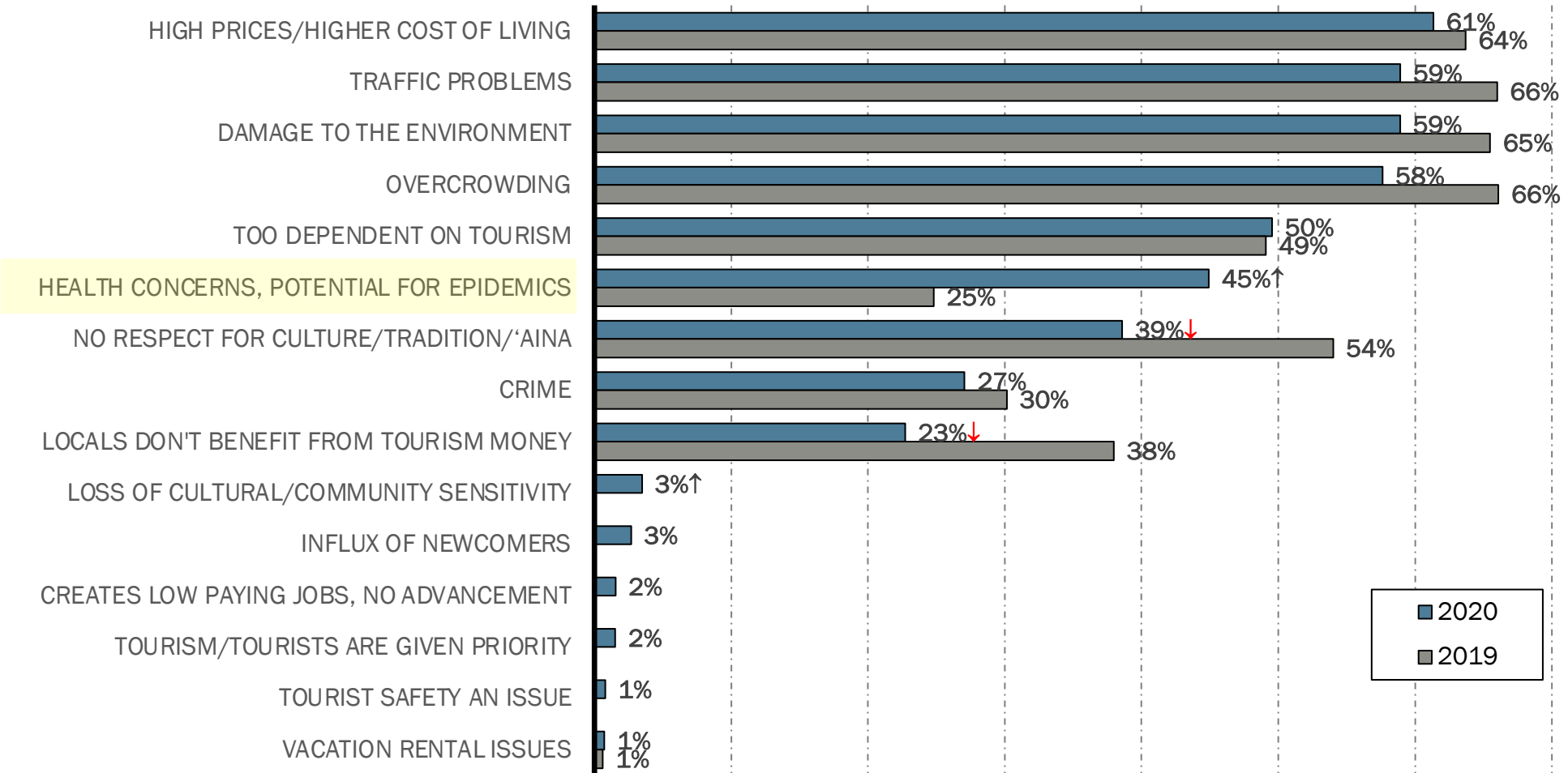


Base: 2019 (669), 2020 (734)

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

Problems Created by Tourism in Hawai'i: O'ahu Residents

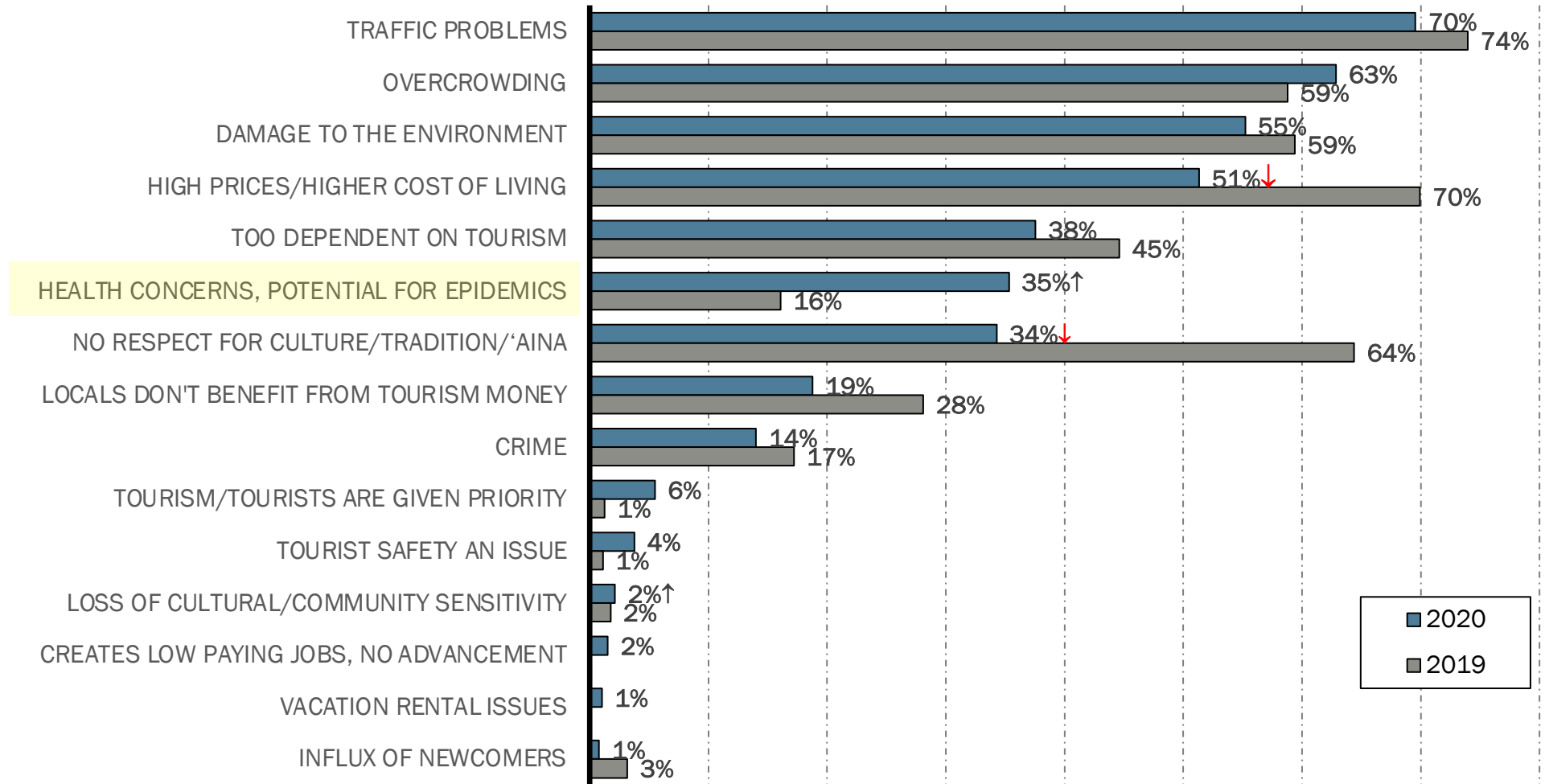
(According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 2019 (235), 2020 (266)

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

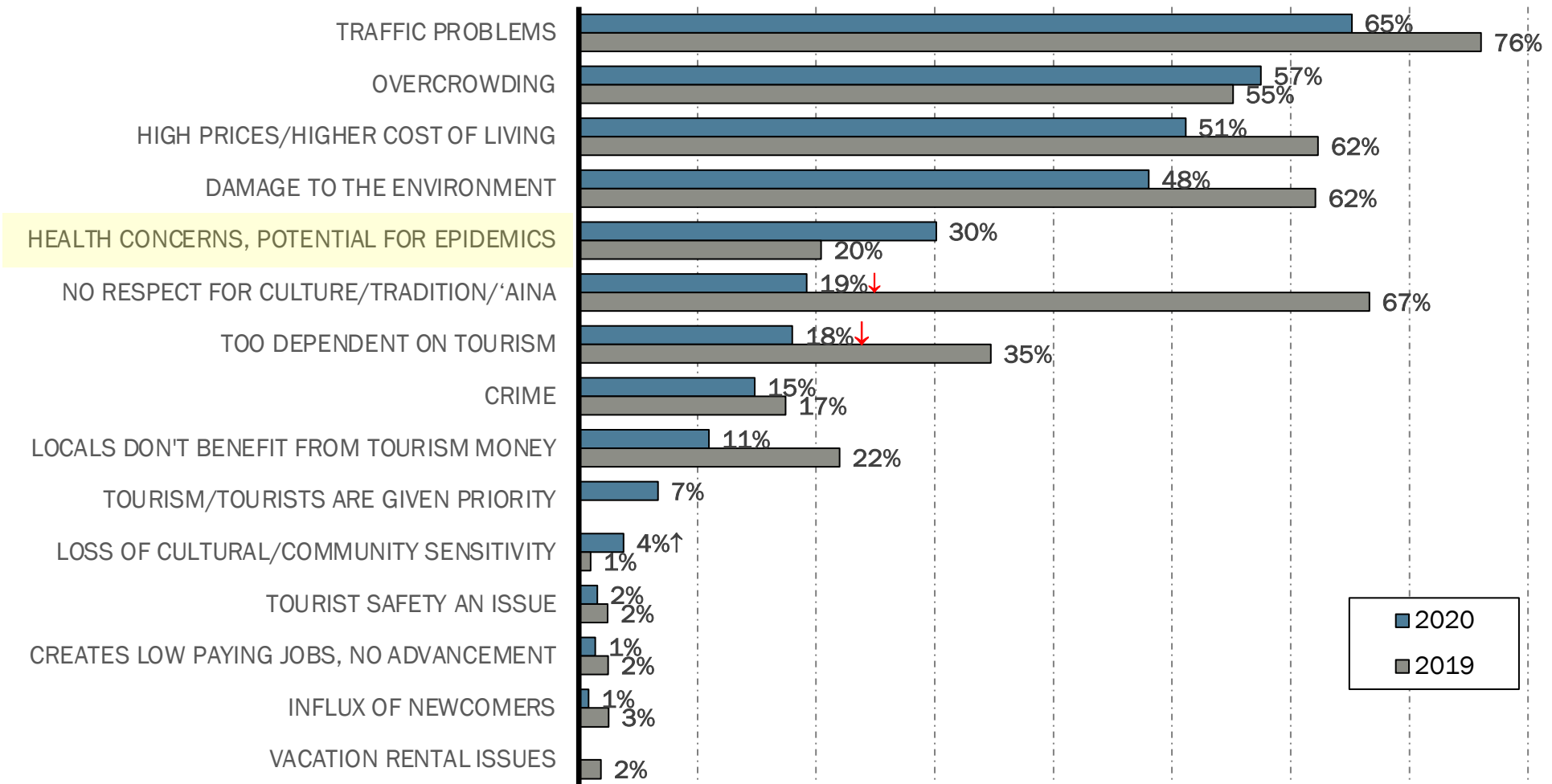
Problems Created by Tourism in Hawai'i: Maui County Residents (According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 2019 (184), 2020 (189)

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

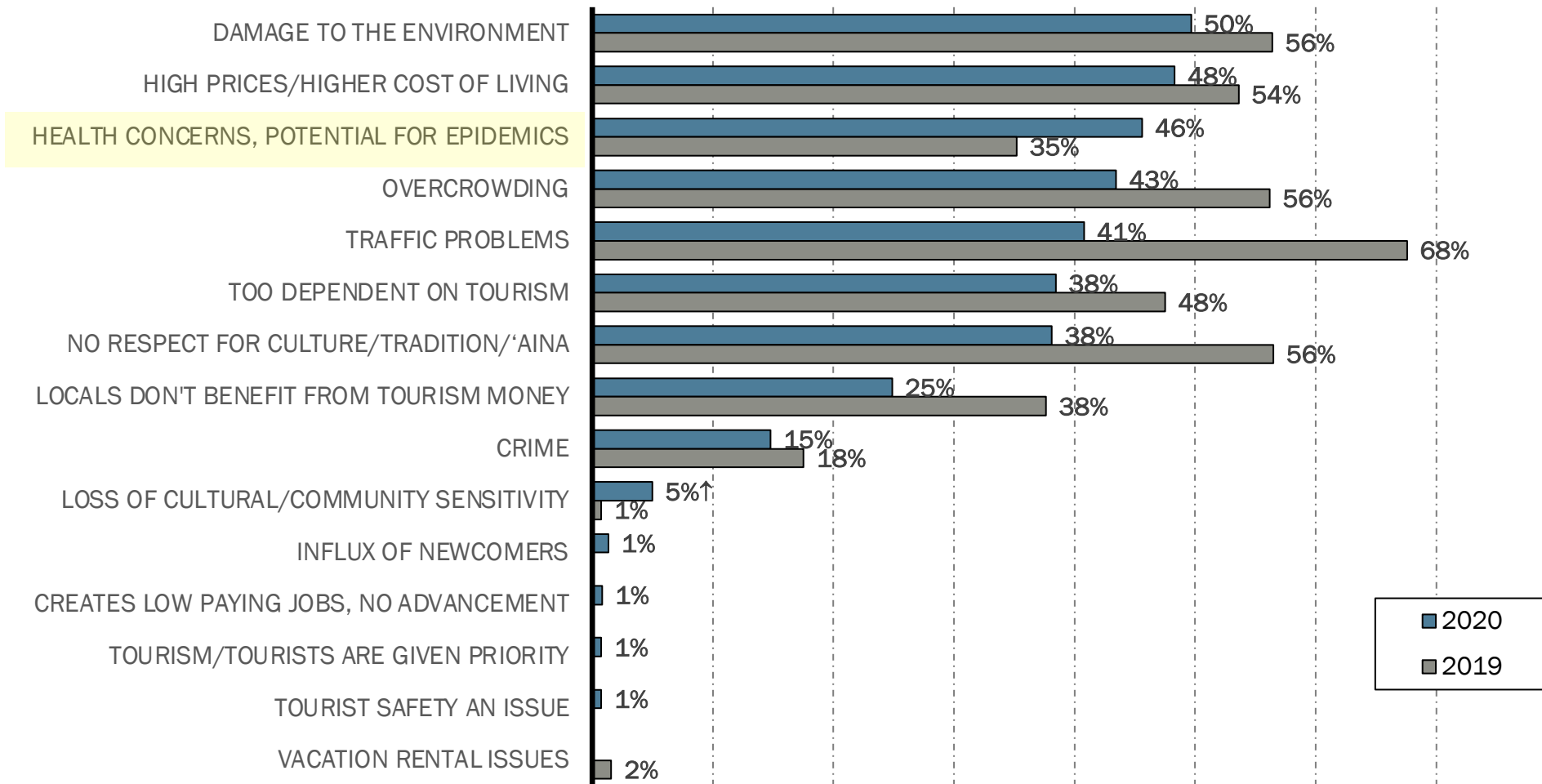
Problems Created by Tourism in Hawai'i: **Kaua'i Residents** (According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 2019 (90), 2020 (95)

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

Problems Created by Tourism in Hawai'i: Hawai'i Island Residents (According to residents saying Hawai'i tourism creates more problems than benefits)



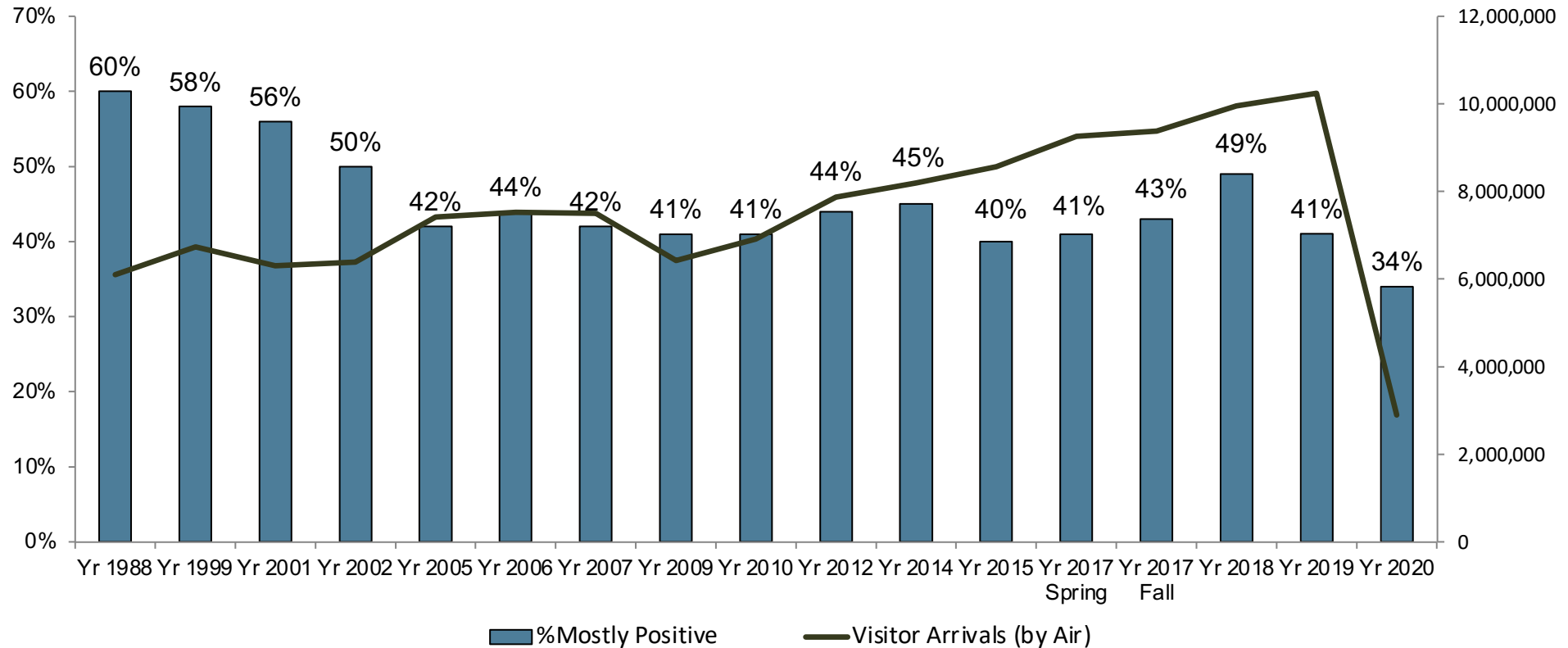
Base: 2019 (160), 2020 (184)

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

Impact on You & Your Family

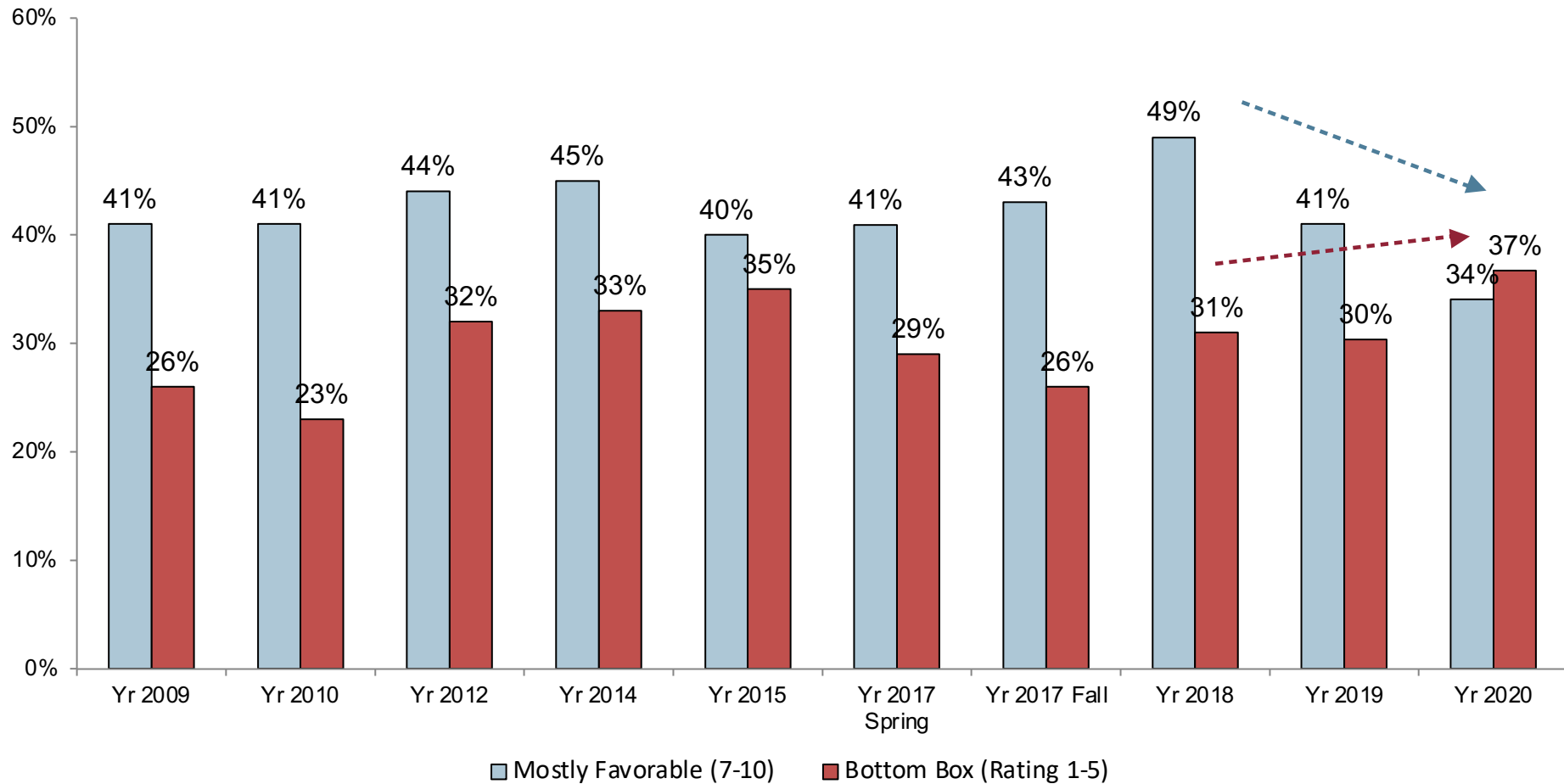
**% saying Tourism has been “mostly positive”
for you and your family**
(Rating of 7-to-10 on 10 Point Scale)

Annual Visitor Arrivals



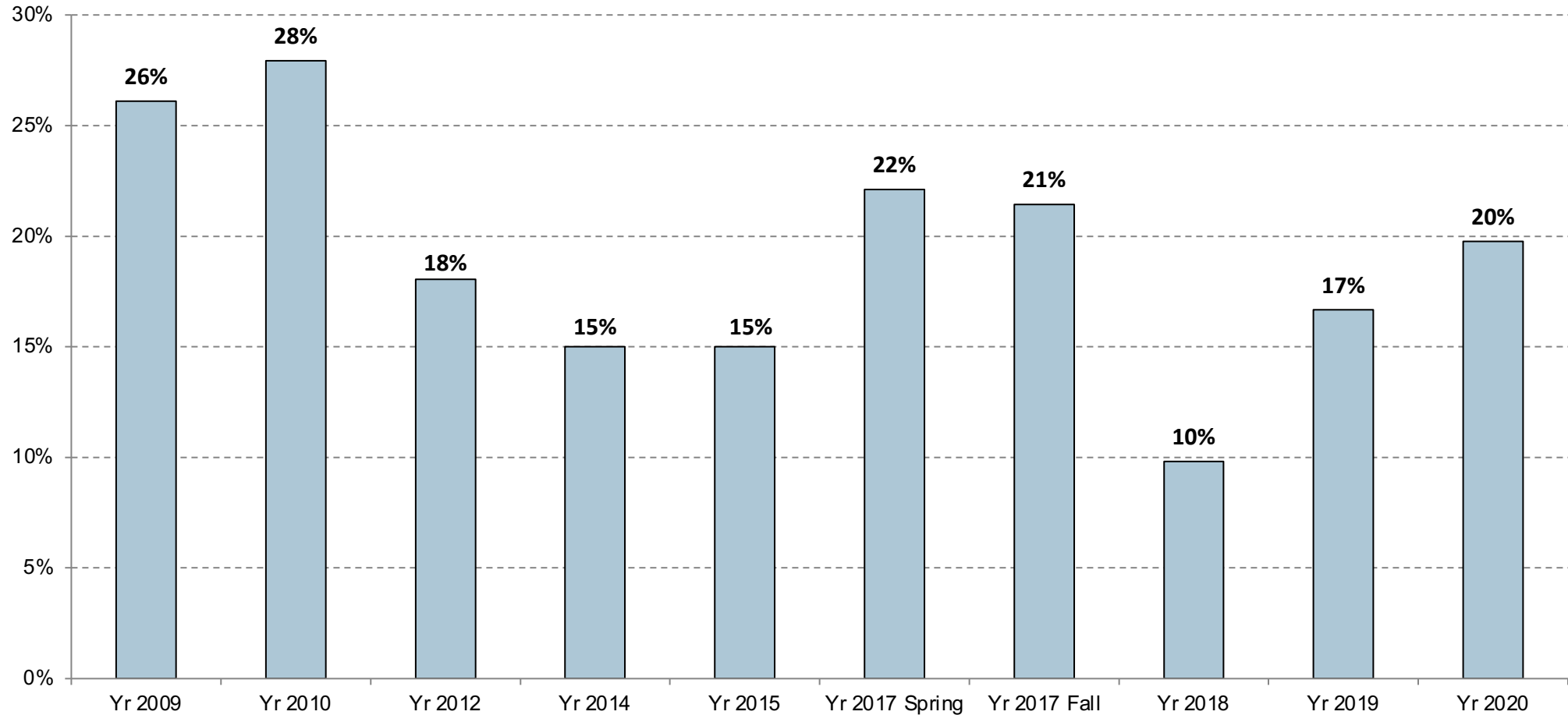
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family



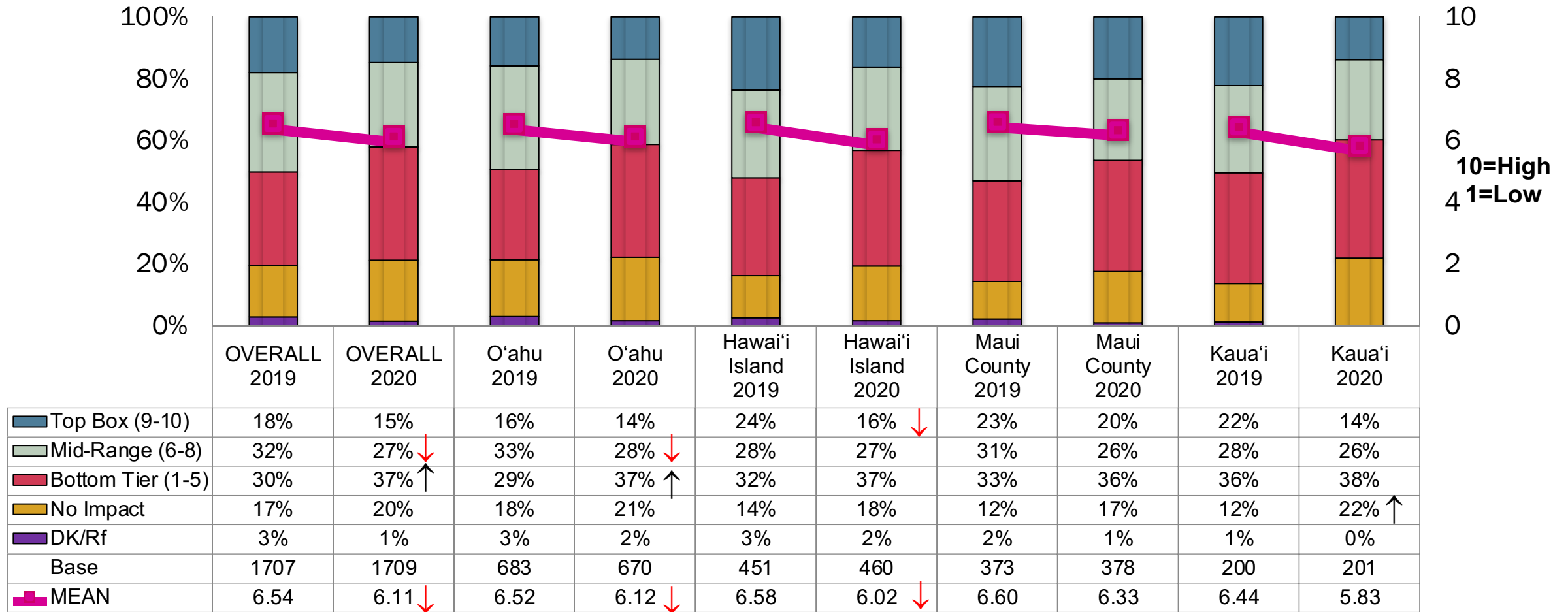
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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*

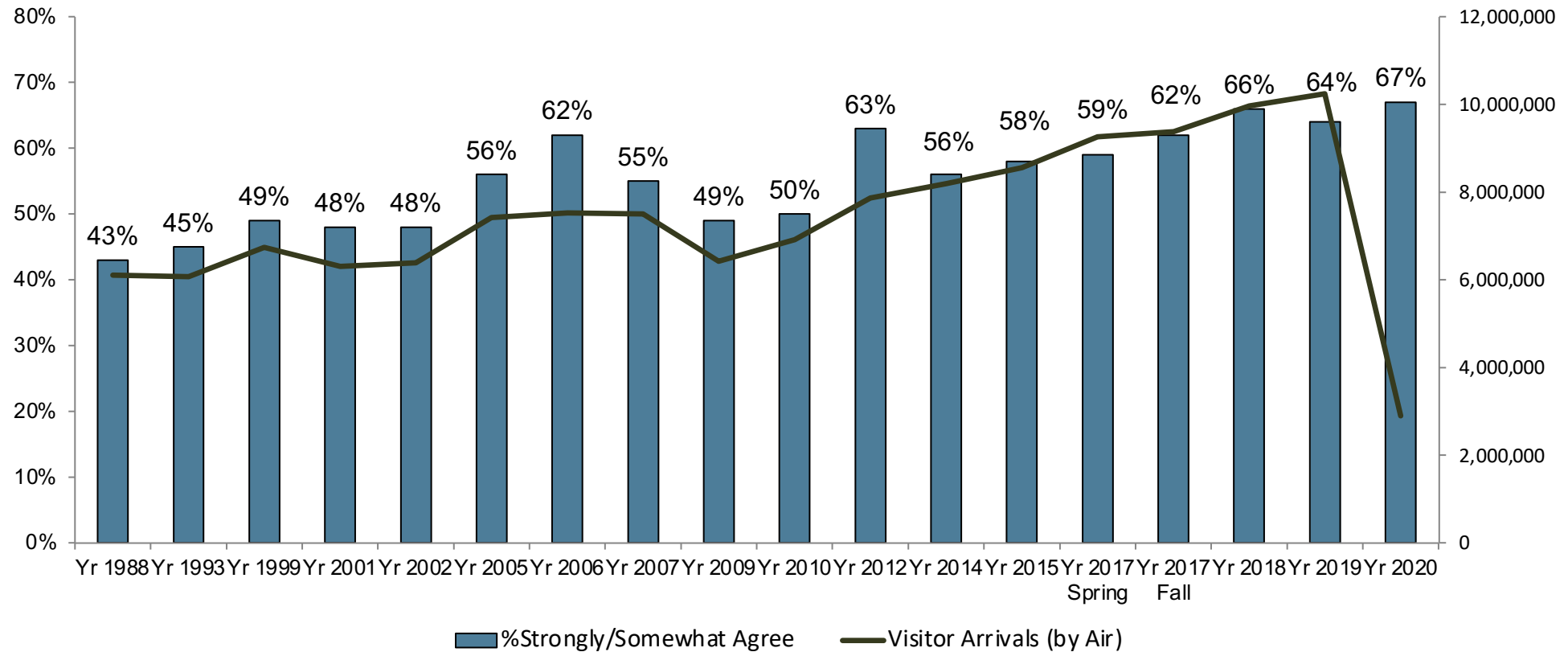


Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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

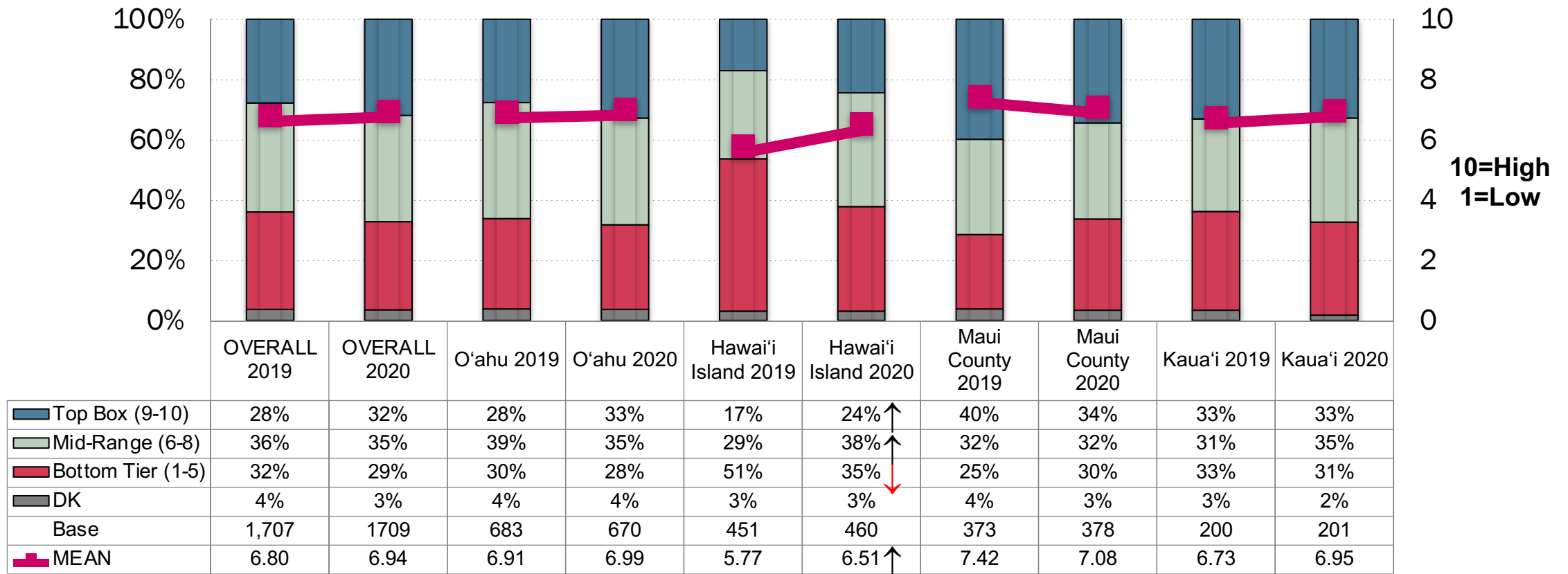
% strongly/ somewhat agree island is being run for tourists at expense of local people
(Rating of 6 to 10)

Annual Visitor Arrivals



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...?

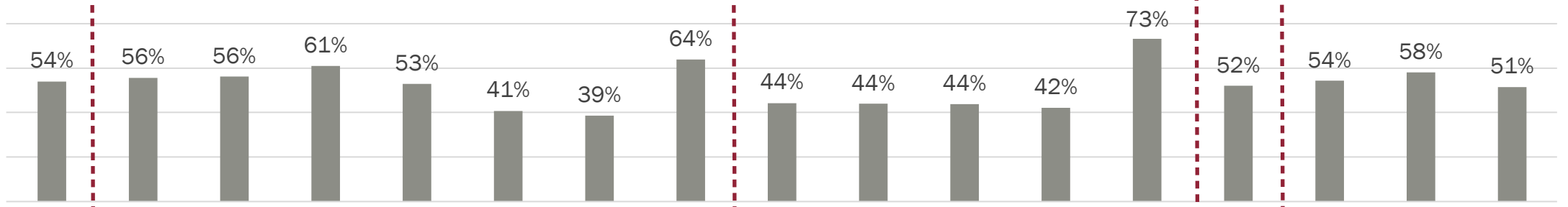
“This island is being run for tourists at the expense of local people” – *By Island*



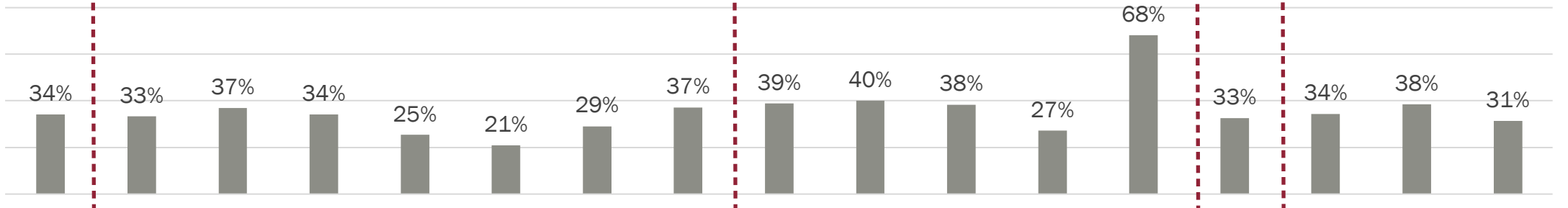
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

3 Tracking Statements by Island/Area

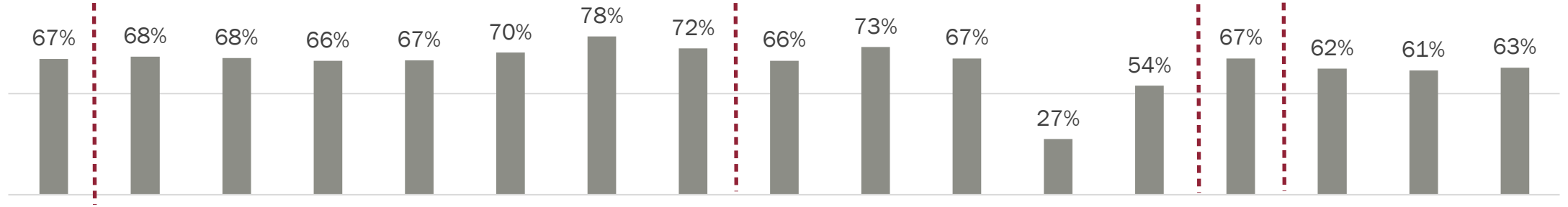
**% strongly/
somewhat
agree tourism
has brought
more benefits
than problems
(Rating 6-10)**



**% saying
Tourism has
been "mostly
positive" for
you and your
family
(Rating 7-10)**



**% strongly/
somewhat
agree Island is
being run for
tourists at
expense of
local people
(Rating 6-10)**



Statewide O'ahu Honolulu 'Ewa/Leeward Wai'anae Windward No. Shore Central Maui County West Maui Central/E. Maui Moloka'i Lāna'i Kaua'i Hawai'i West Hawai'i East Hawai'i

Drivers of Resident Sentiment

Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Social Benefits (35%) 2019: 42% 2018: 20% Fall '17: 40%	Creates many well-paying jobs for residents	10%
	Creates shopping, restaurants and entertainment opportunities for residents	8%
	Creates jobs that have opportunities for advancement	8%
	Sponsors festivals, activities & sports events for residents & visitors	7%
	Provides opportunities for residents to be involved	2%
	Is an industry that enhances residents' quality of life	0%
Cultural & Community Benefits (35%) 2019: 42% 2018: 55% Fall '17: 40%	I feel like I have a voice in my island's tourism development decisions	11%
	Tourism presents Native Hawaiian language and culture in an authentic manner	10%
	Tourism makes me feel special because people travel to see my island's unique features	6%
	Tourism is consistent with community values on this island	4%
	Helps to preserves Native Hawaiian culture and language	4%
	Helps sustain Hawai'i's natural resources, parks and cultural sites	0%
	Tourism in Hawai'i reminds me that we have a unique culture to share with visitors	0%
Negative Impacts (15%) 2019: 16% 2018: 25% Fall '17: 20%	Tourism results in a higher cost of living	4%
	My island's economy is too dependent on tourism	4%
	Tourism in Hawai'i increases traffic problems	4%
	This island is being run for tourists at the expense of local people	3%
Re-open Hawaii (12%)	People from outside the state of Hawai'i should not be visiting Hawaii at this time	6%
	My island should be re-opened to visitors in order to bring back jobs & businesses	5%
	I am confident that state & county governments can safely re-open my island to visitors	1%
Quarantine (3%)	The state & county governments are doing an effective job at enforcing the mandatory 14-day quarantine for visitors	3%

Moving Forward: What's the Big Idea?

1

Resident sentiment toward Hawai'i's visitor industry has weakened in 2020, due to an unparalleled major shock from the pandemic which has associated tourism with increased health concerns.

2

The industry's impact on residents' health and safety takes on key role in resident sentiment, as residents seek:

- Economic/Social benefits
- Cultural/Community benefits
- Address negative impacts
- AND a responsible reopening, quarantine enforcement

3

To improve resident sentiment:

- Provide residents with a voice in tourism development
- Present Native Hawaiian culture/language authentically
- Create well-paying jobs, with opportunities for advancement
- Create shopping, restaurants and entertainment



Addendum

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	19%	15%	31%	30%	26%
Japanese	18%	23%	9%	7%	9%
Hawaiian	23%	22%	27%	27%	24%
Filipino	10%	9%	9%	15%	18%
Other	29%	31%	23%	21%	23%

D2: What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1-2	44%	42%	48%	53%	40%
3-4	36%	37%	36%	28%	40%
5-6	13%	14%	10%	14%	14%
7+	5%	6%	5%	4%	5%
REFUSED	3%	3%	2%	3%	2%
MEAN	3.0	3.1	2.8	3.0	3.2

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	32%	32%	34%	29%	36%
Married	49%	50%	48%	46%	44%
Divorced, separated, widowed	13%	13%	13%	14%	14%
Domestic Partnership	4%	3%	3%	6%	3%
Other	0%	0%	0%	0%	1%
Refused	2%	2%	1%	4%	3%

D4: What is your marital status?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	20%	18%	27%	21%	30%
Bus/ Trade School/Some college	28%	28%	27%	32%	30%
College Graduate	51%	53%	46%	44%	39%
DK/Refused	1%	1%	1%	3%	2%

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

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	43%	44%	39%	41%	47%
FEMALE	57%	56%	61%	59%	53%

D7: What is your gender?

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	17%	18%	13%	16%	10%
Management	6%	5%	4%	10%	8%
Admin/clerical	7%	7%	7%	7%	7%
Service	5%	5%	4%	7%	6%
Sales	6%	6%	7%	4%	6%
Retired	21%	21%	24%	20%	20%
Other	27%	26%	28%	27%	34%
Unemployed	11%	11%	13%	9%	10%

D8: What is your occupation?

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	10%	9%	19%	9%	4%
\$25K-\$35K	6%	4%	10%	13%	12%
\$35K-\$50K	10%	10%	11%	7%	8%
\$50K-\$75K	15%	15%	19%	16%	7%
\$75K-\$100K	15%	15%	15%	14%	15%
\$100K-\$150K	17%	19%	8%	14%	15%
\$150K-\$200K	7%	9%	3%	4%	10%
\$200K+	5%	6%	2%	4%	4%
DK/ Rf	15%	13%	14%	19%	25%

D9: Which of the following broad categories includes your household's total annual income from all sources before taxes for 2018?
Just stop me when I come to the correct category?



Mahalo from the Omnitrak Group