

HTA Resident Sentiment Survey 2021 Highlights

Prepared for the:
Hawai'i Tourism Authority: Project #5782
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What's the **Big Idea?**

1

While many are concerned with visitor industry growth, the majority of Hawai'i residents believe that tourism is worth the issues associated with the industry.

2

Resident's benchmark ratings of current efforts to better manage tourism are mixed, but such initiatives play an important role in influencing resident sentiment.

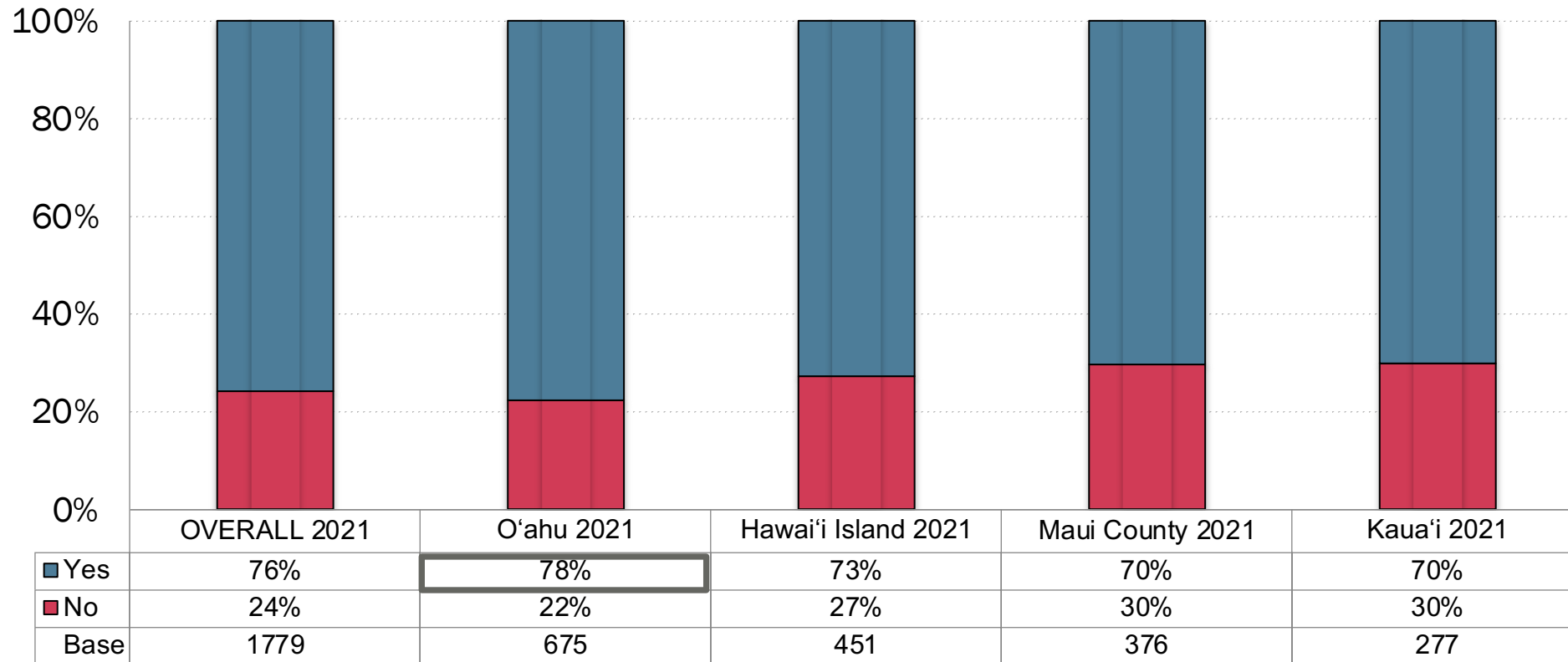
3

Moving forward, initiatives that grow the Economic and Quality of Life benefits of tourism, integrated with Managed Tourism efforts, hold the most influence for improving resident sentiment.



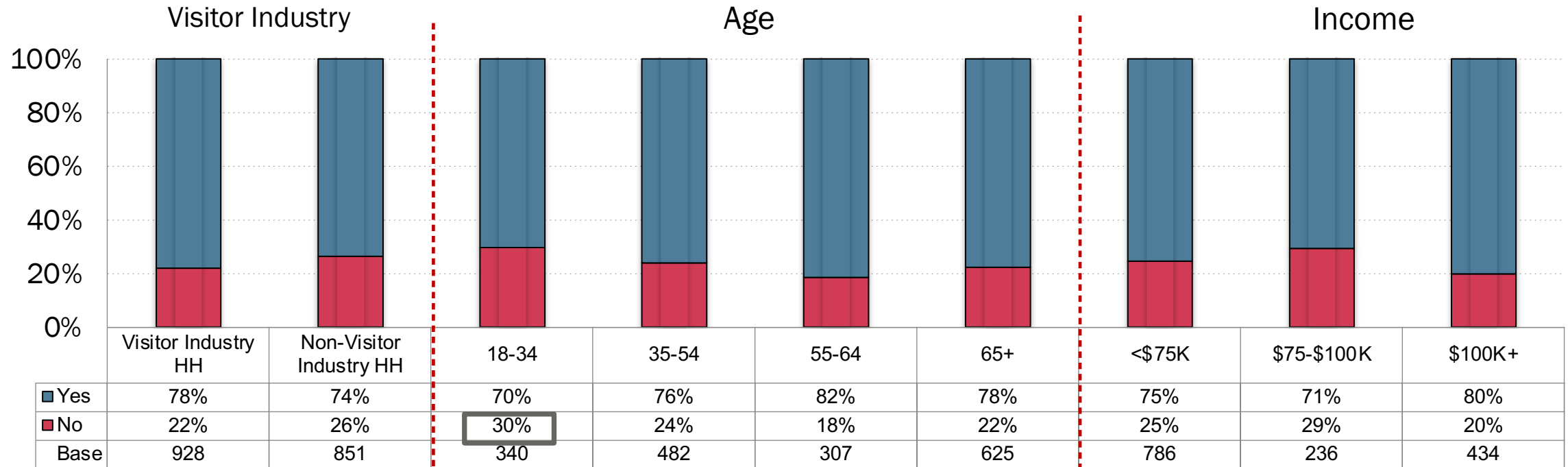
Is Tourism in Hawai'i Worth it?

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



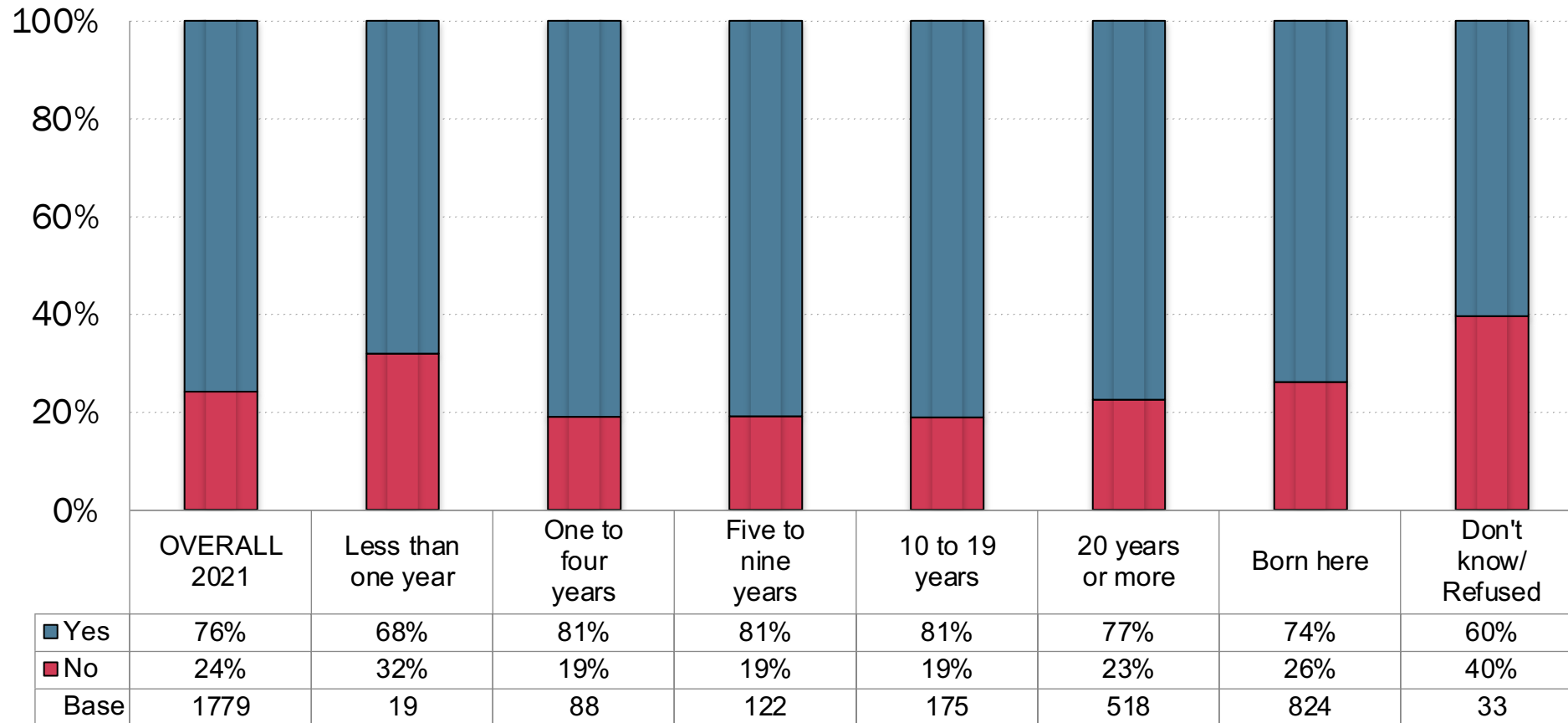
Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“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 Number of Years of Living in Hawai‘i*

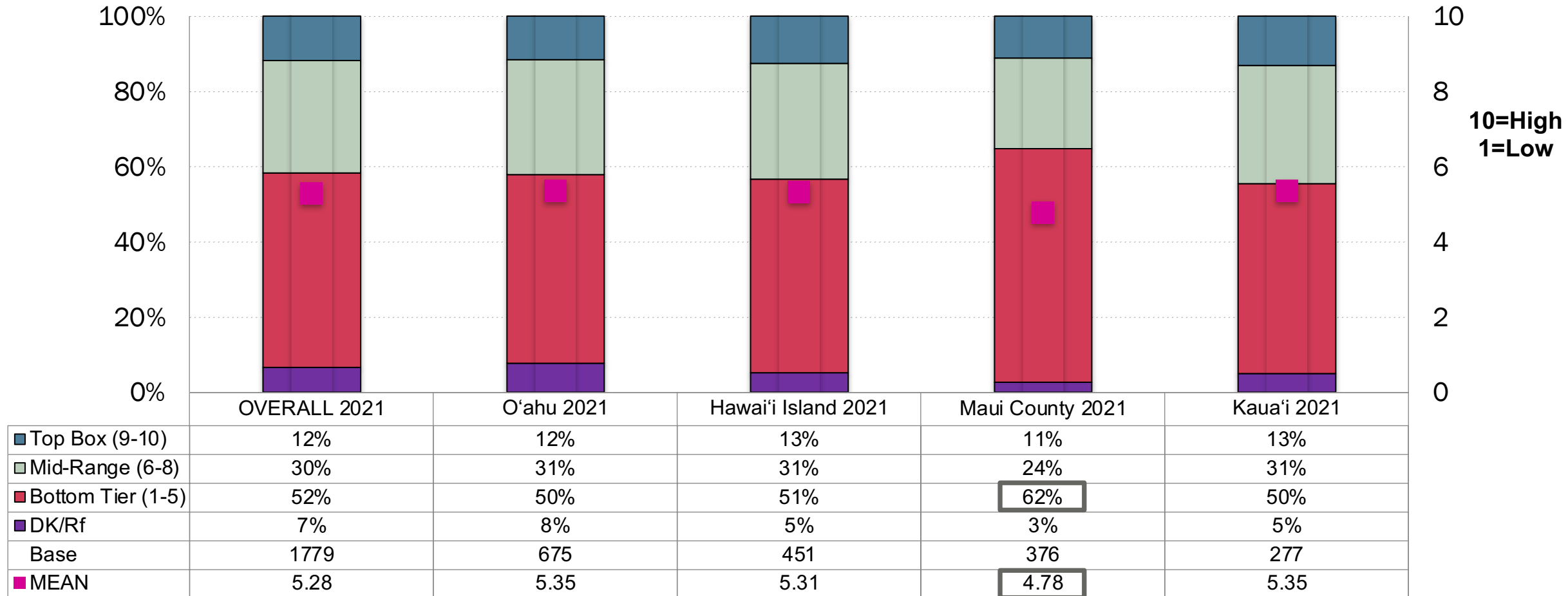


Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?



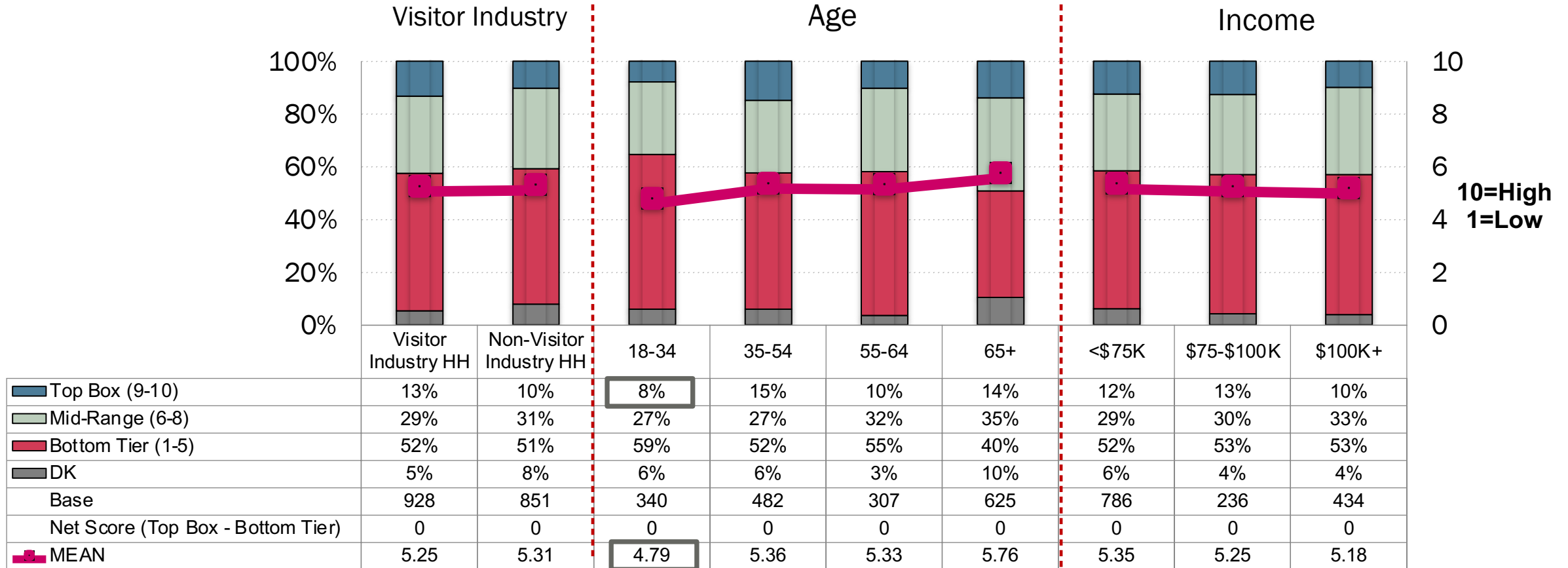
Resident Ratings of Overall Tourism Management Efforts - Benchmark

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



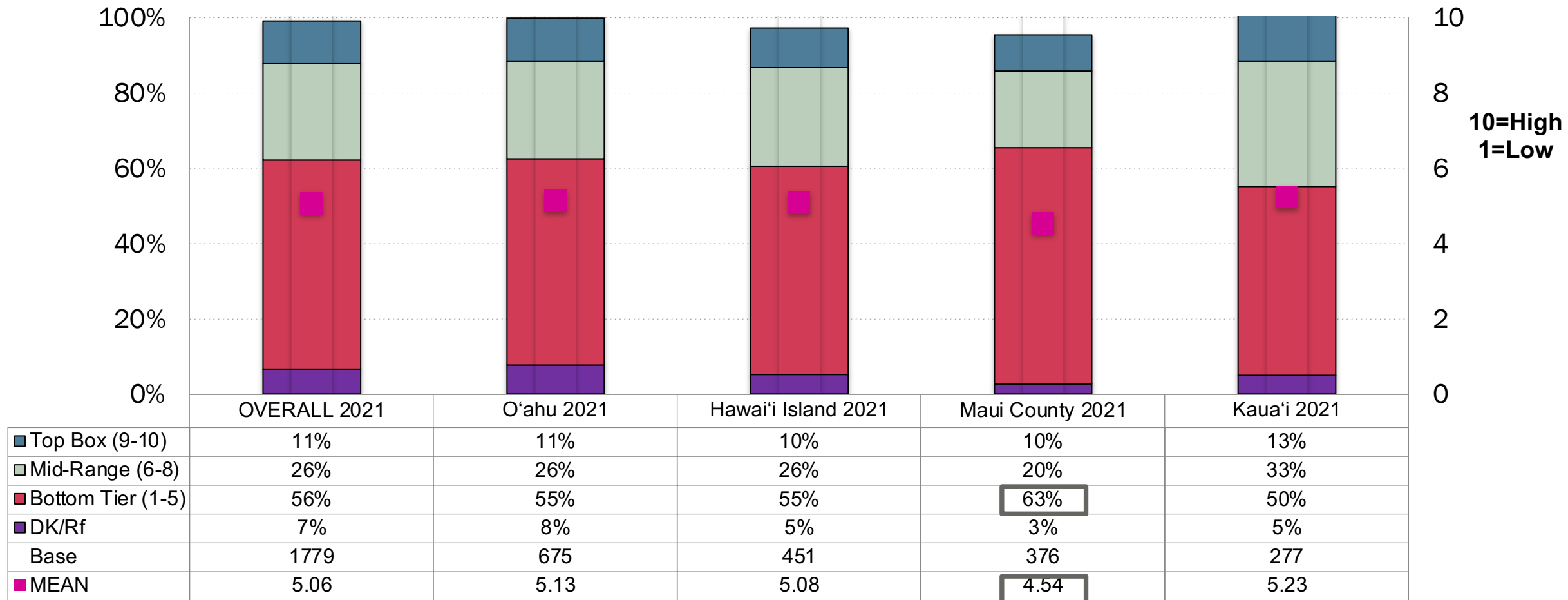
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



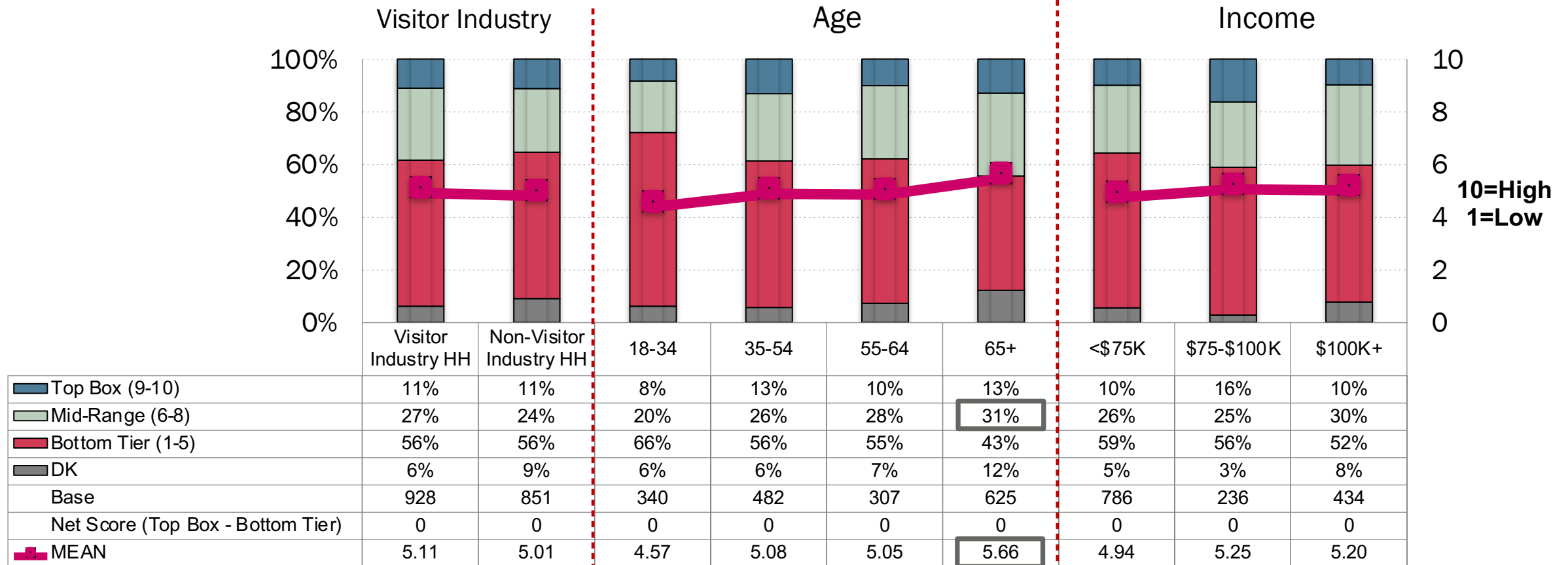
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“I feel like tourism is being better managed on my island” – *By Island*



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

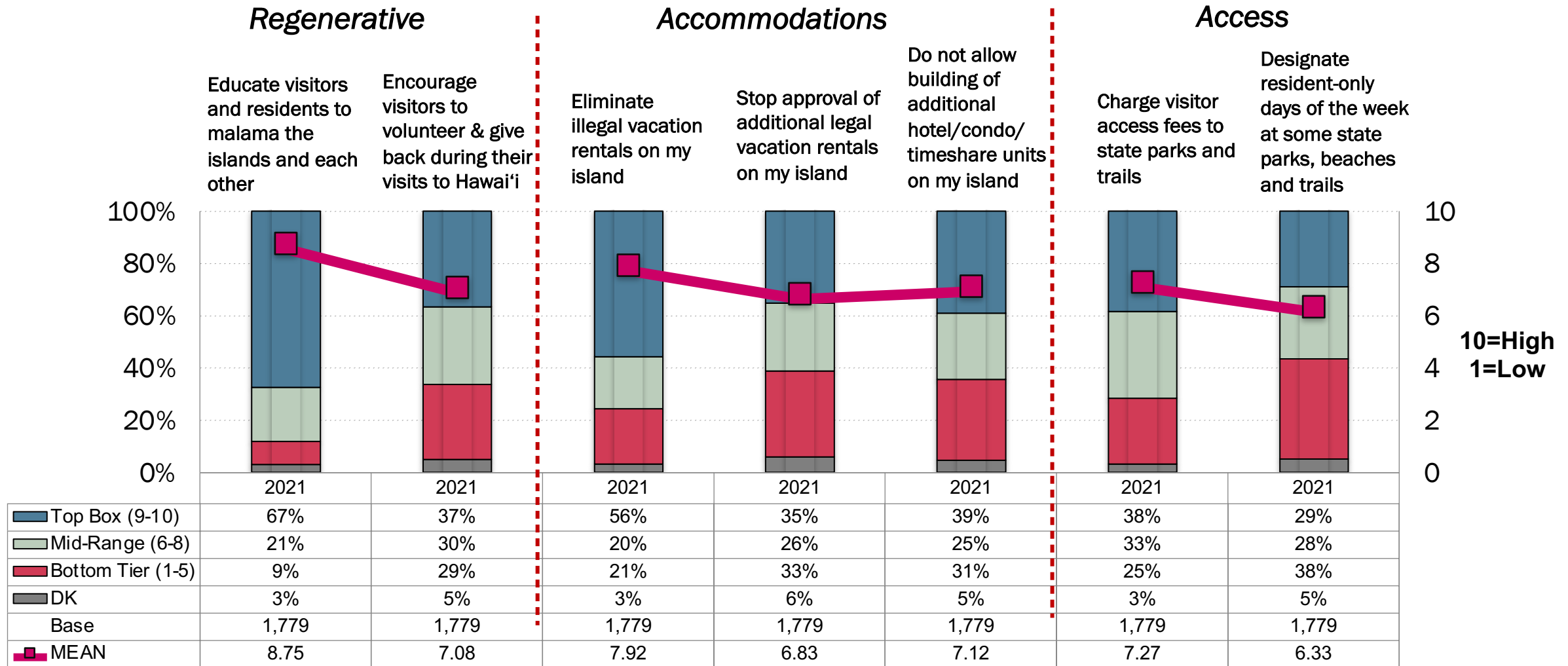


Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



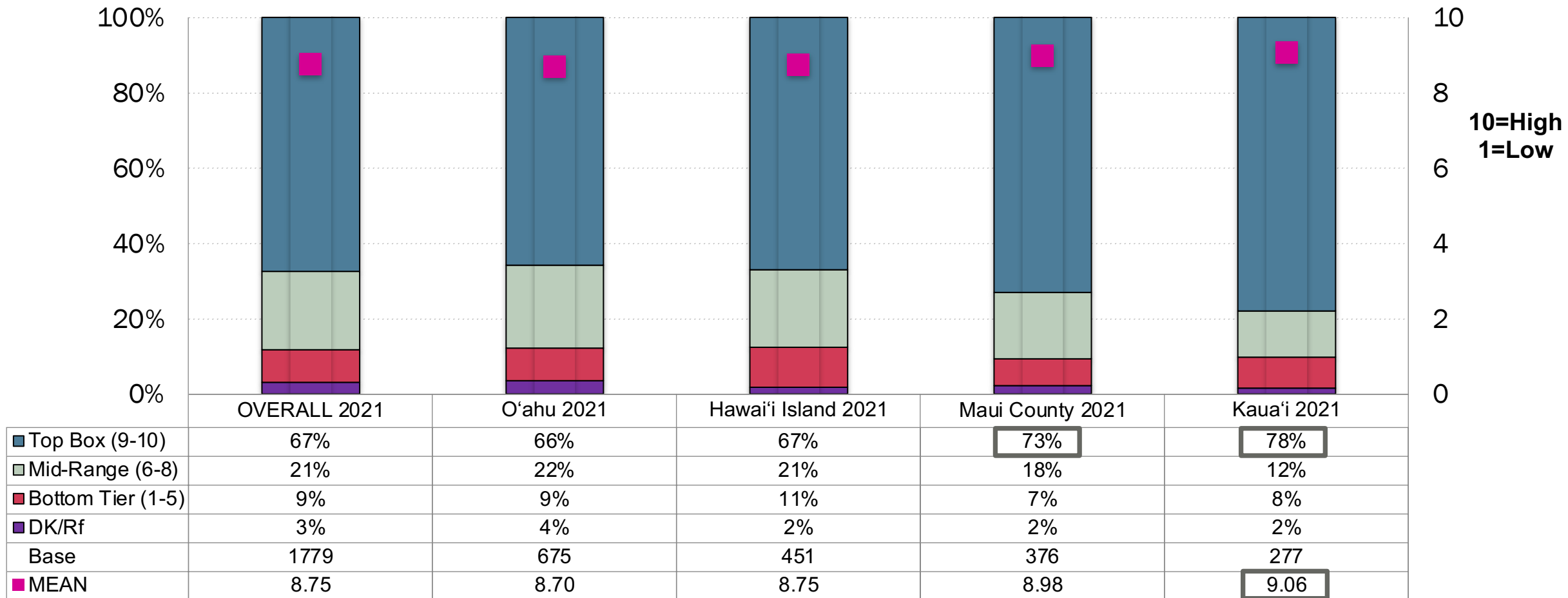
Resident Ratings of Specific Tourism Management Strategies

Importance of Select Managed Tourism Strategies



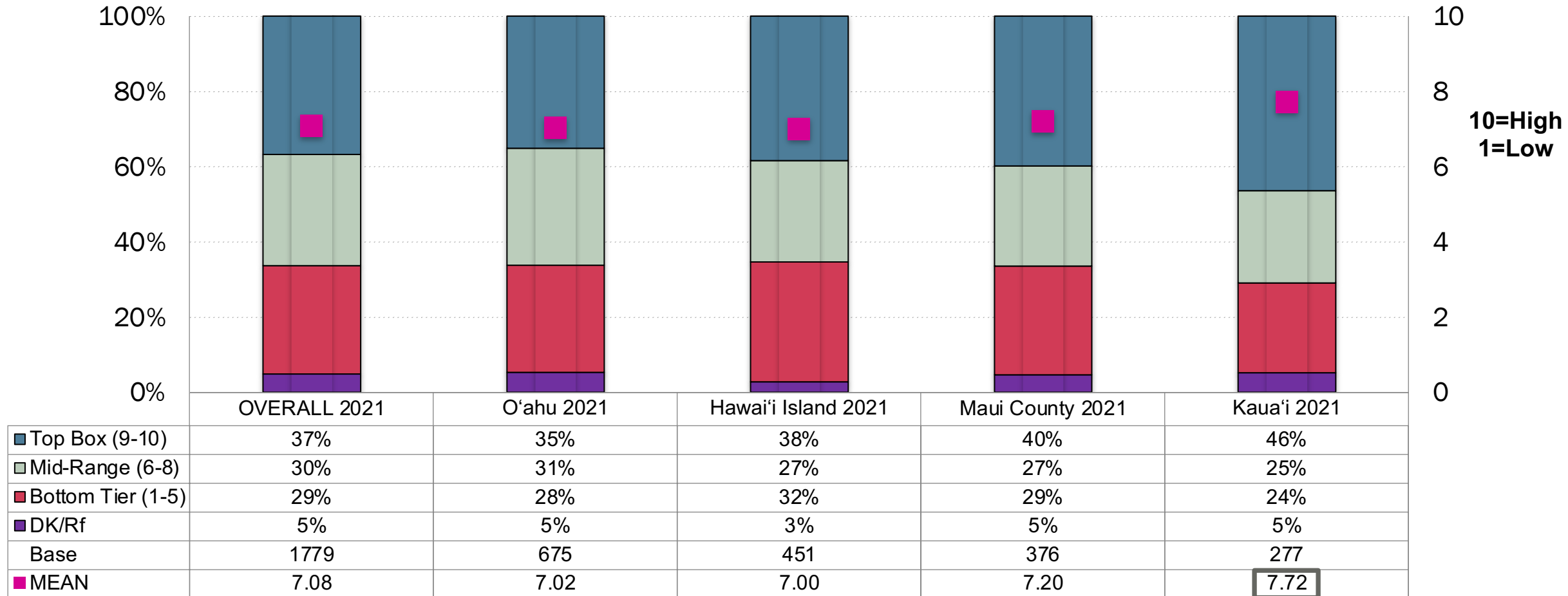
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

“Educate visitors and residents to malama the islands and each other” – *By Island*



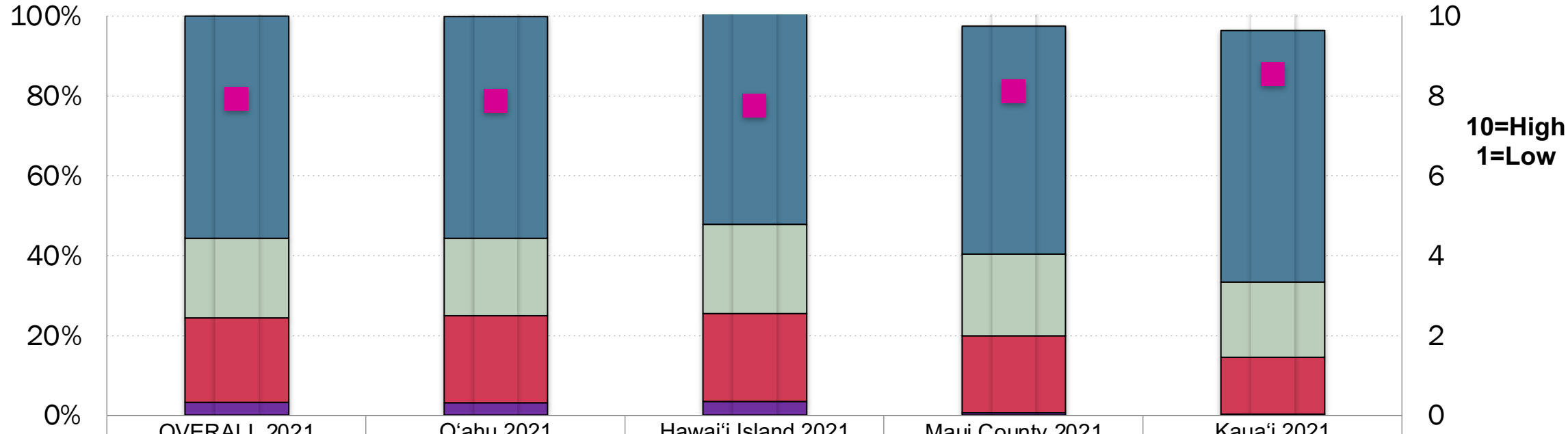
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

“Encourage visitors to volunteer and give back during their visits to Hawaii” – *By Island*



Q7. Legally, the state of Hawaii 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?

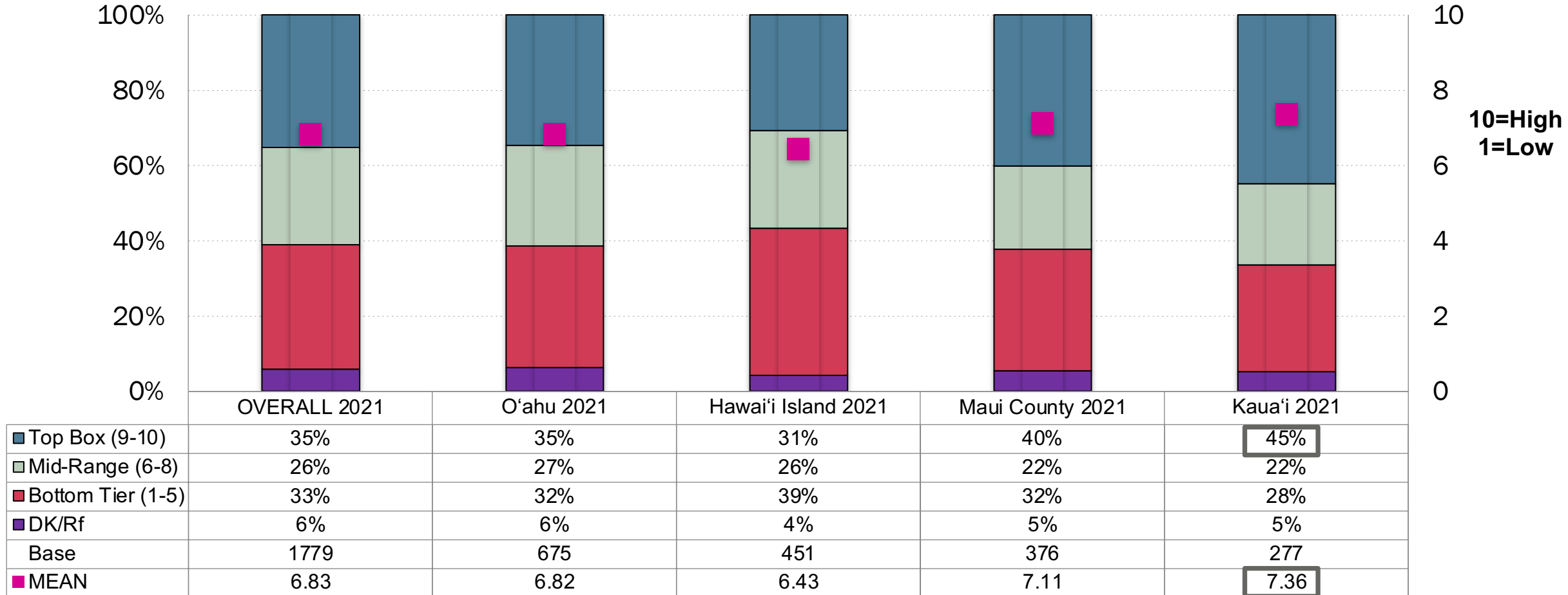
“Eliminate illegal vacation rentals on my island” – *By Island*



	OVERALL 2021	O'ahu 2021	Hawai'i Island 2021	Maui County 2021	Kaua'i 2021
■ Top Box (9-10)	56%	55%	53%	57%	63%
■ Mid-Range (6-8)	20%	19%	22%	20%	19%
■ Bottom Tier (1-5)	21%	22%	22%	19%	14%
■ DK/Rf	3%	3%	3%	1%	0%
Base	1779	675	451	376	277
■ MEAN	7.92	7.88	7.76	8.11	8.53

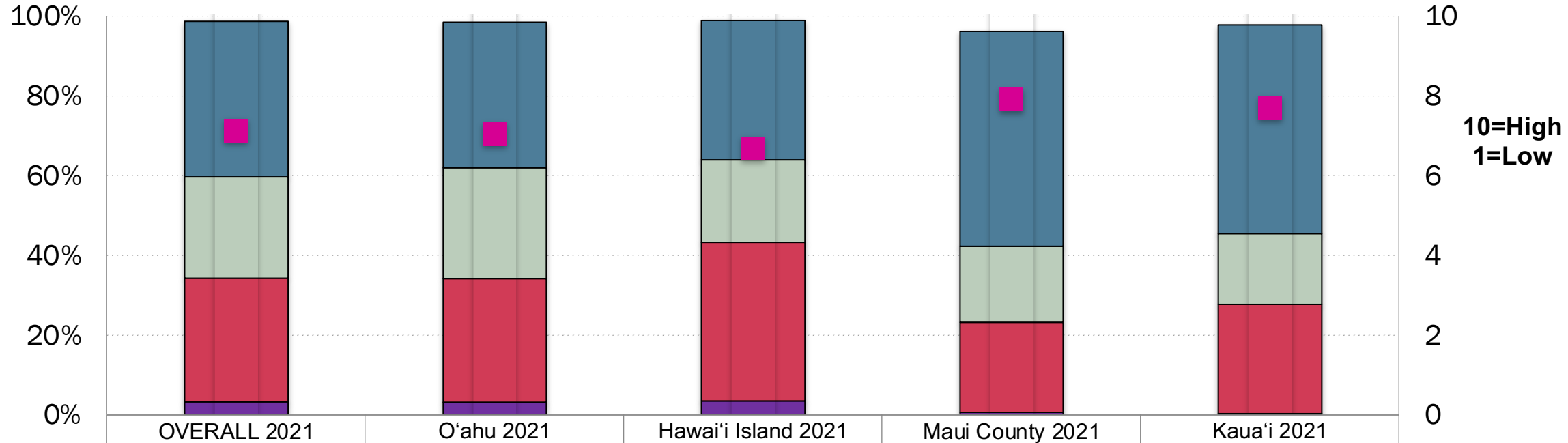
Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

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



Q7. Legally, the state of Hawaii 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?

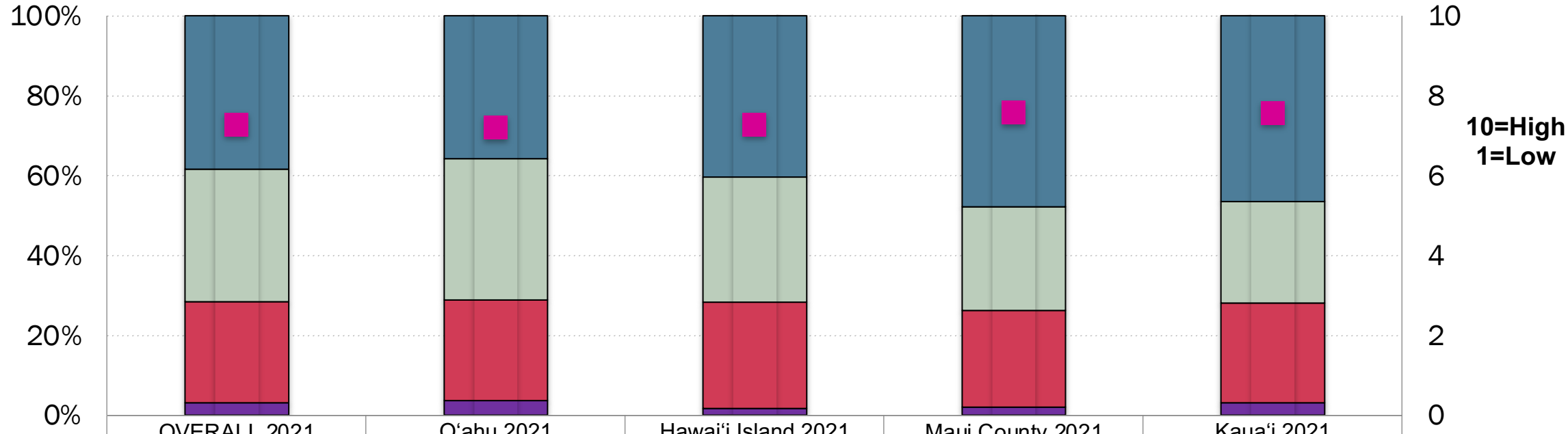
“Do not allow building of additional hotel/condo/timeshare units on my island” – *By Island*



	OVERALL 2021	O'ahu 2021	Hawai'i Island 2021	Maui County 2021	Kaua'i 2021
■ Top Box (9-10)	39%	36%	35%	54%	52%
■ Mid-Range (6-8)	25%	28%	21%	19%	18%
■ Bottom Tier (1-5)	31%	31%	40%	23%	27%
■ DK/Rf	3%	3%	3%	1%	0%
Base	1779	675	451	376	277
■ MEAN	7.12	7.04	6.67	7.90	7.68

Q7. Legally, the state of Hawaii 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?

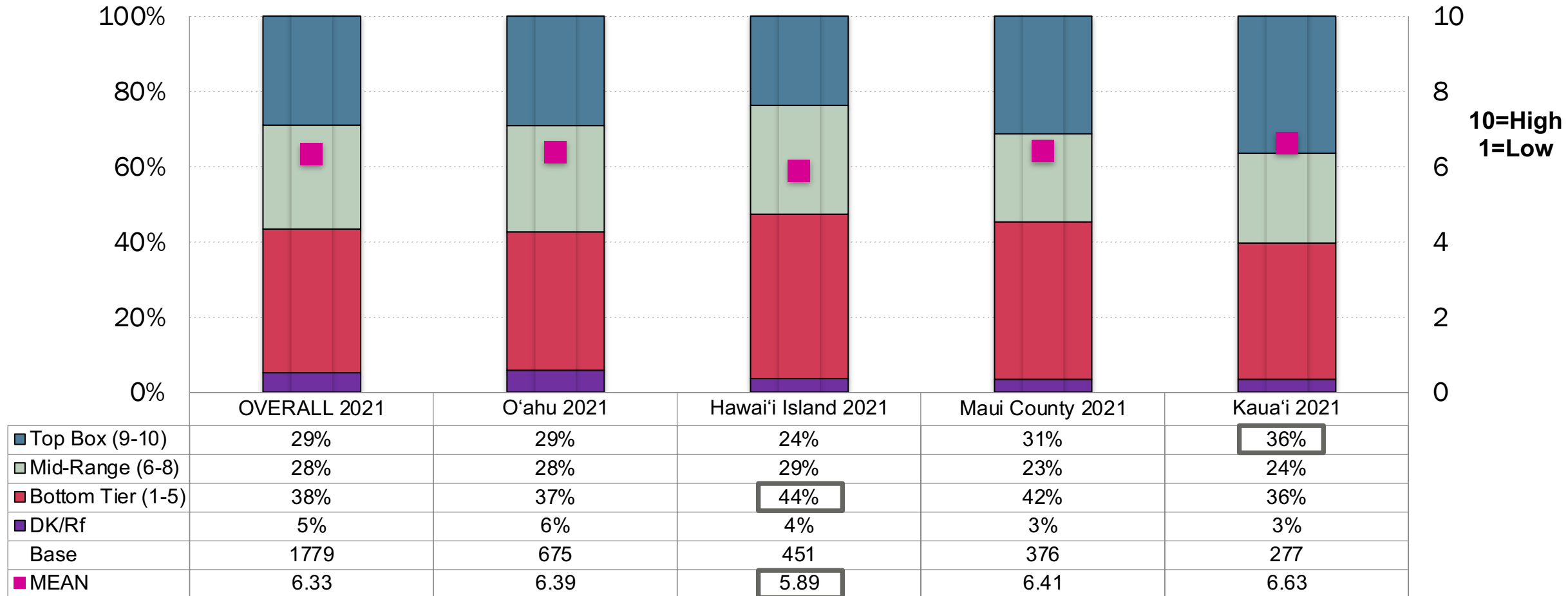
“Charge visitor access fees to state parks and trails” – *By Island*



	OVERALL 2021	O'ahu 2021	Hawai'i Island 2021	Maui County 2021	Kaua'i 2021
■ Top Box (9-10)	38%	36%	40%	48%	47%
■ Mid-Range (6-8)	33%	35%	31%	26%	25%
■ Bottom Tier (1-5)	25%	25%	27%	24%	25%
■ DK/Rf	3%	4%	2%	2%	3%
Base	1779	675	451	376	277
■ MEAN	7.27	7.20	7.28	7.57	7.56

Q7. Legally, the state of Hawaii 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?

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

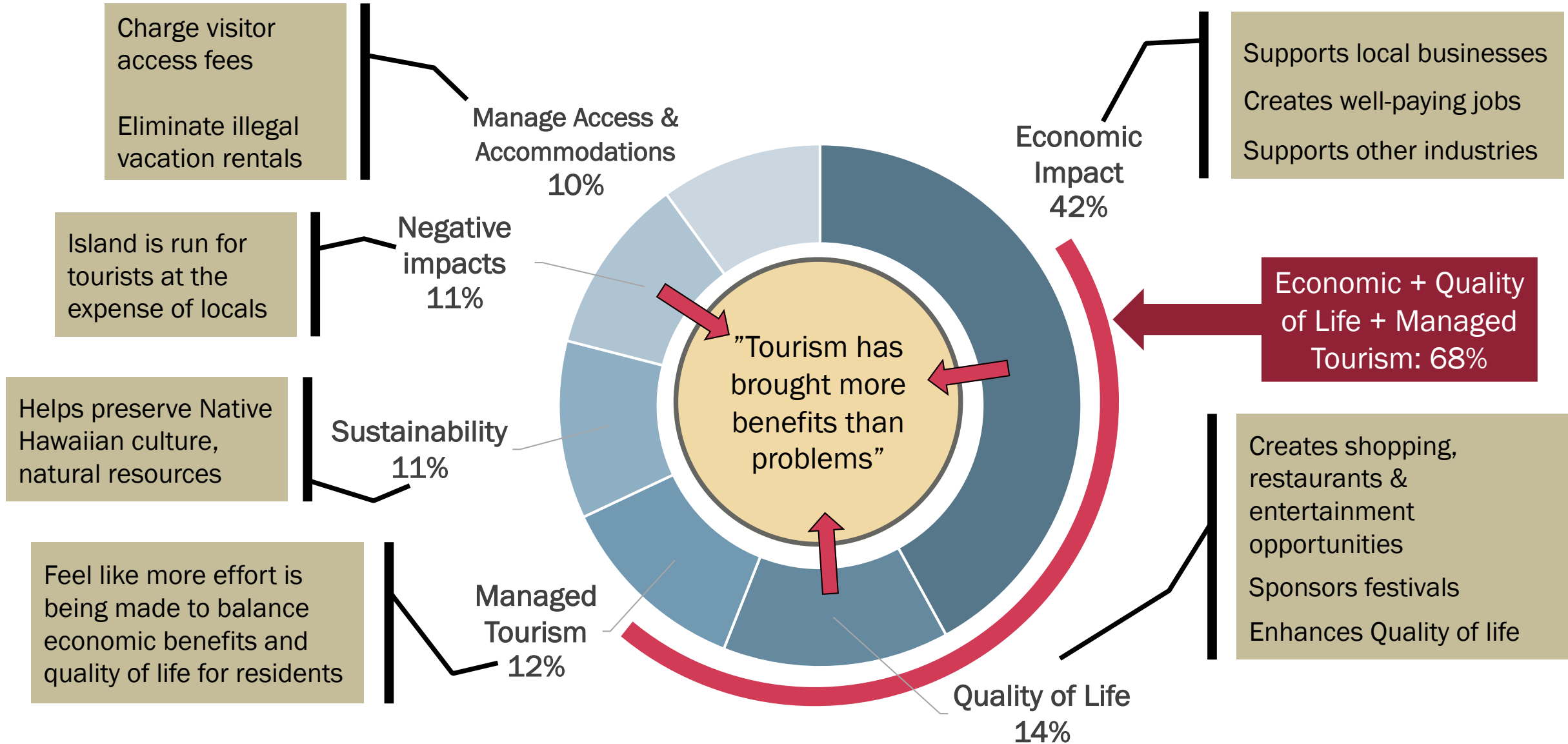


Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



Drivers of Resident Sentiment

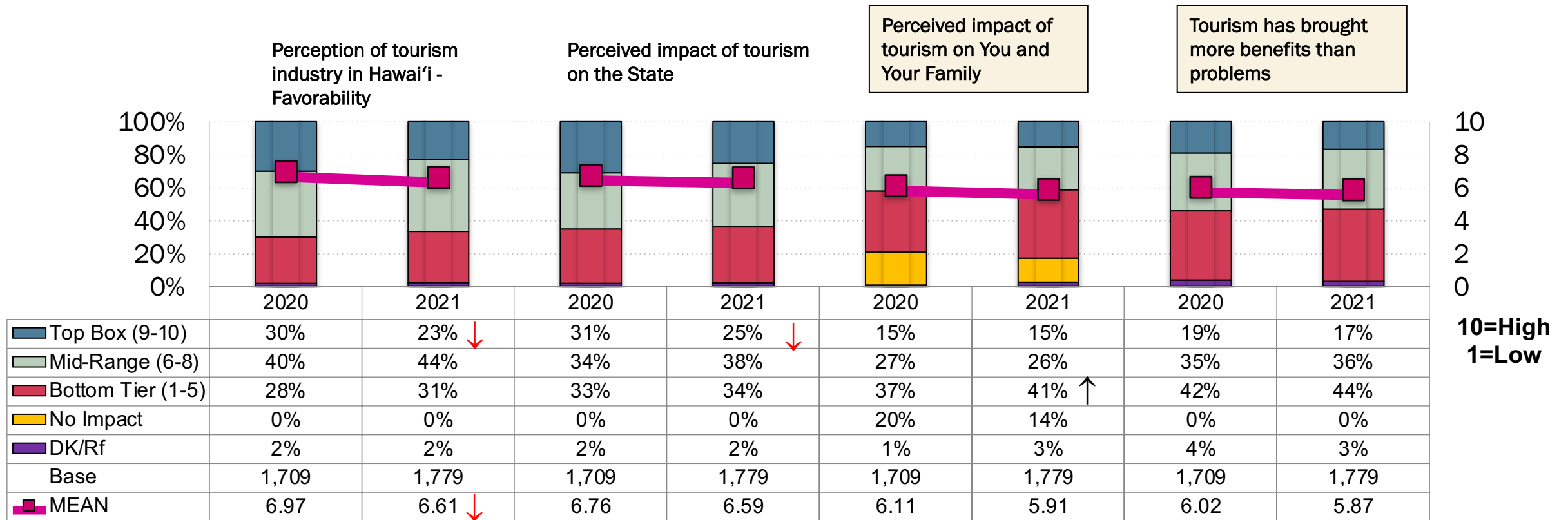
Drivers of Resident Sentiment





Overview of Spring 2021 Resident Sentiment Indicators

High Level Indicators of Resident Sentiment

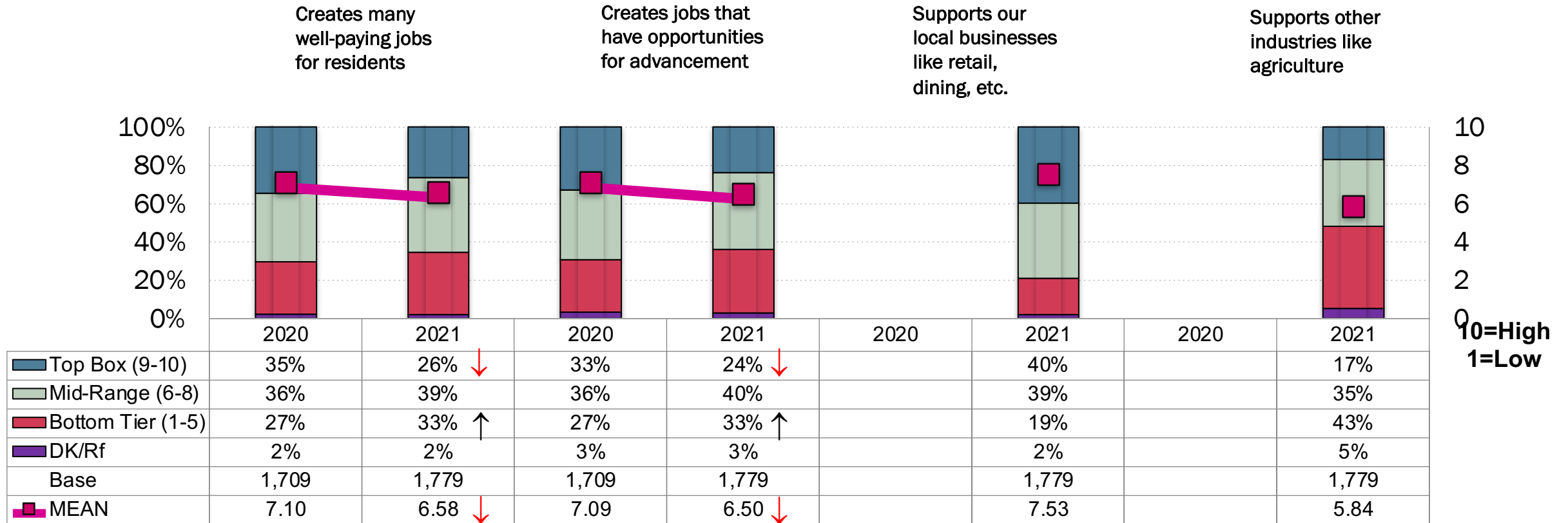


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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.

Economic Impact

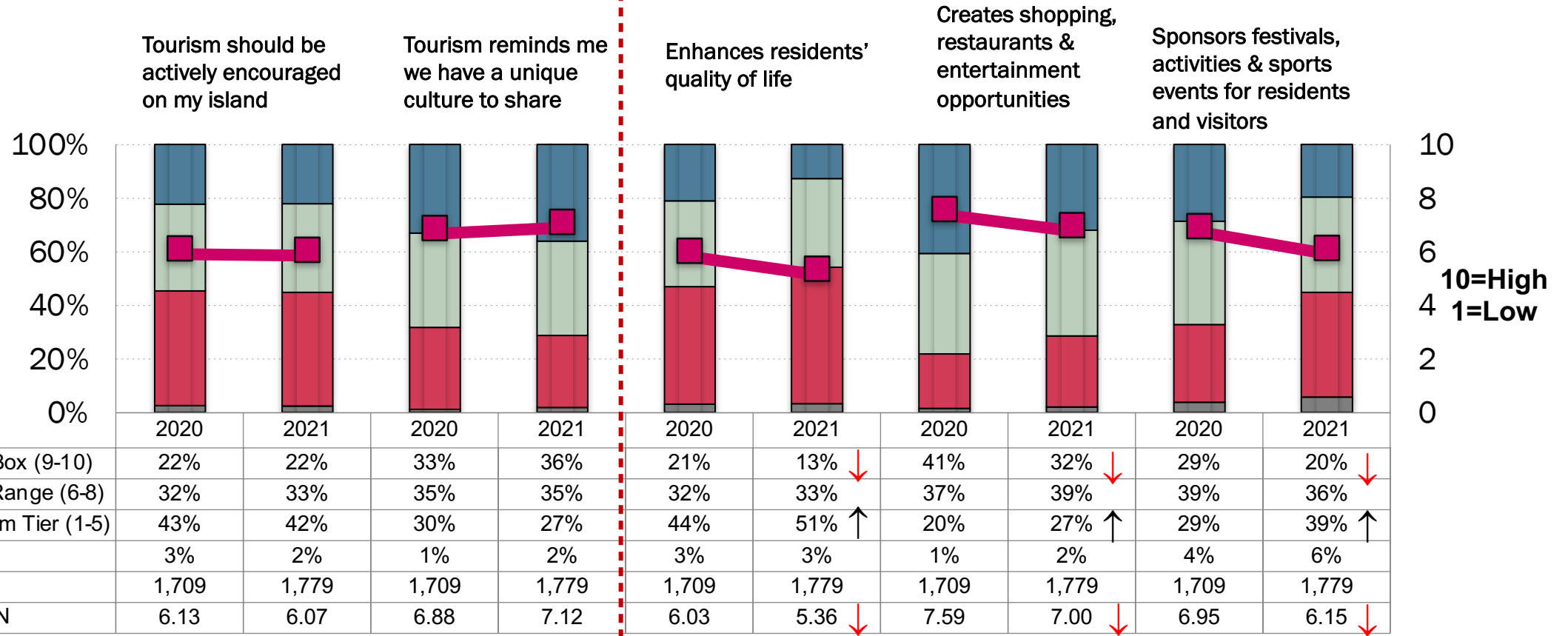


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Economic Impact (...continued)/Quality of Life

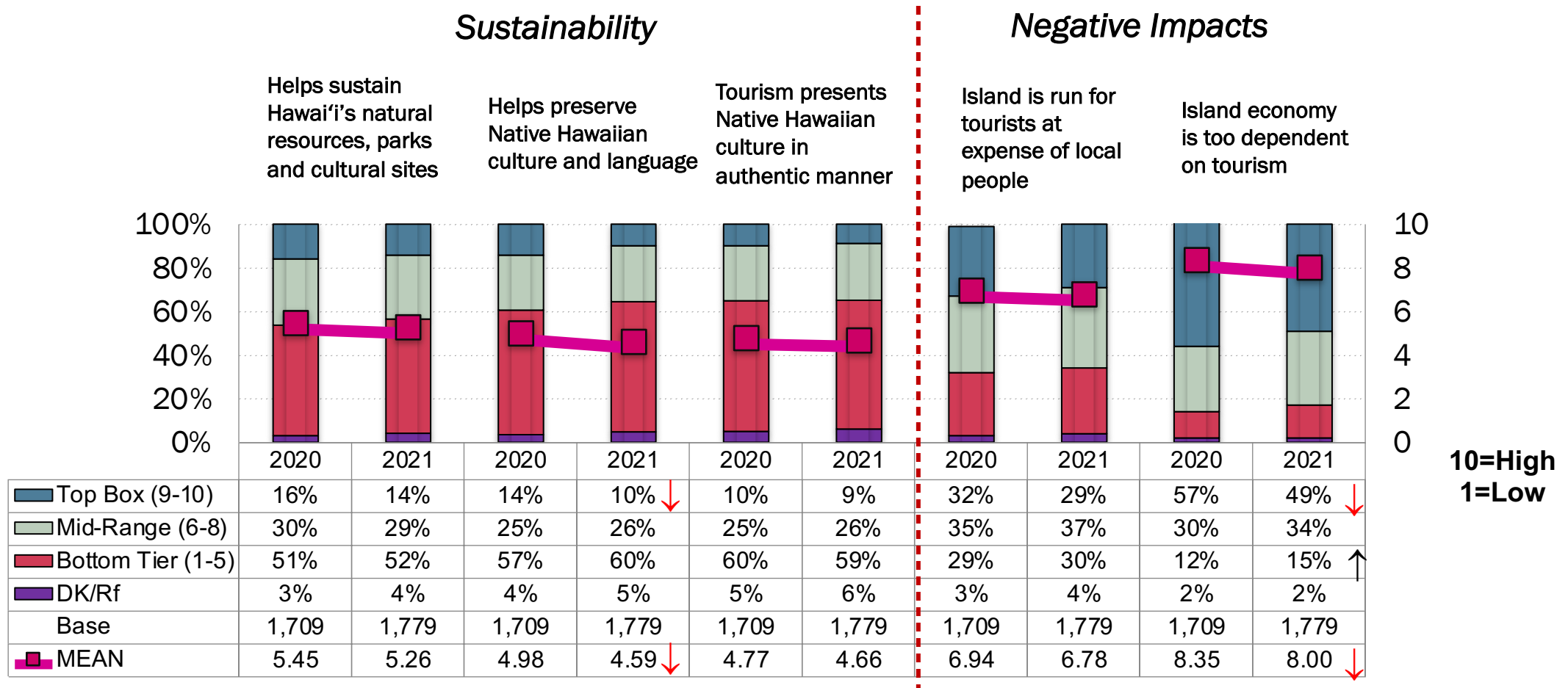
Economic Impact

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.

Natural Resources & Cultural Sustainability, Negative Impacts



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.



Mahalo from the Omnitrak Group



Appendix

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 17 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. **The sample includes both landline (31%) and cellular (15%) phones; and an online component (54%)**

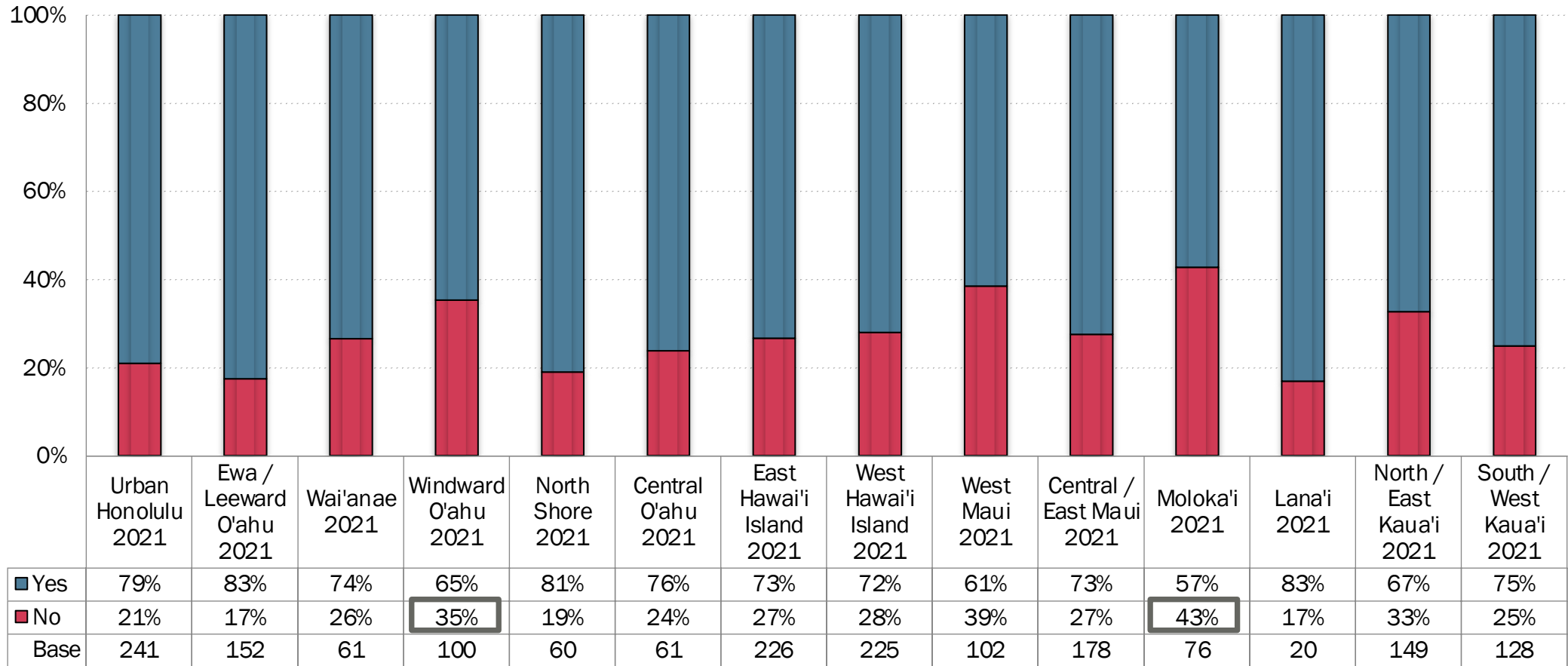
Statewide sampling produced a total of n = 1,779 respondents as follows:

- O'ahu: 675
- Hawai'i Island: 451
- Maui County: 376
- Kaua'i: 277

Methodology

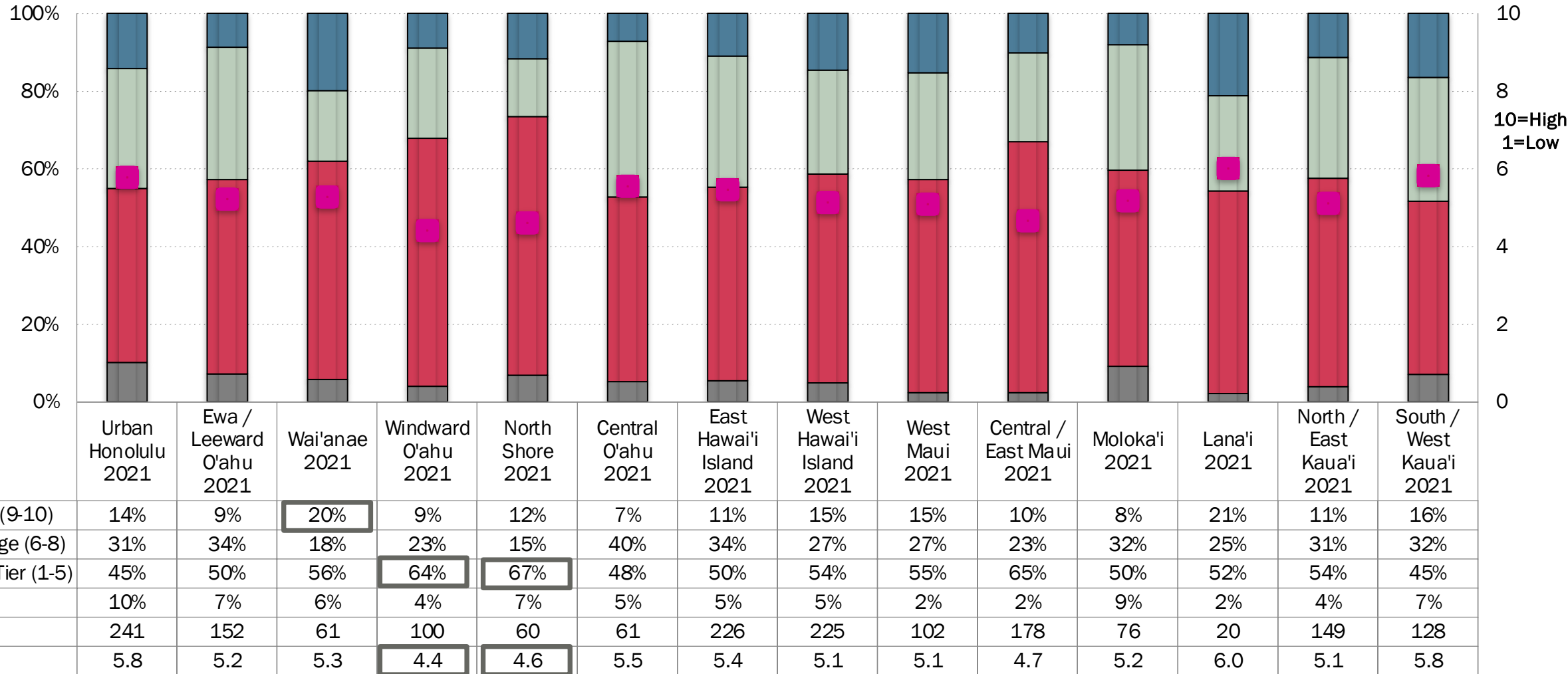
- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI) and online surveys. Just under half (46%) respondents completed the survey via telephone, and the remainder (54%) completed the survey online.
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- **Field Dates:**
April 27 through June 3, 2021

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



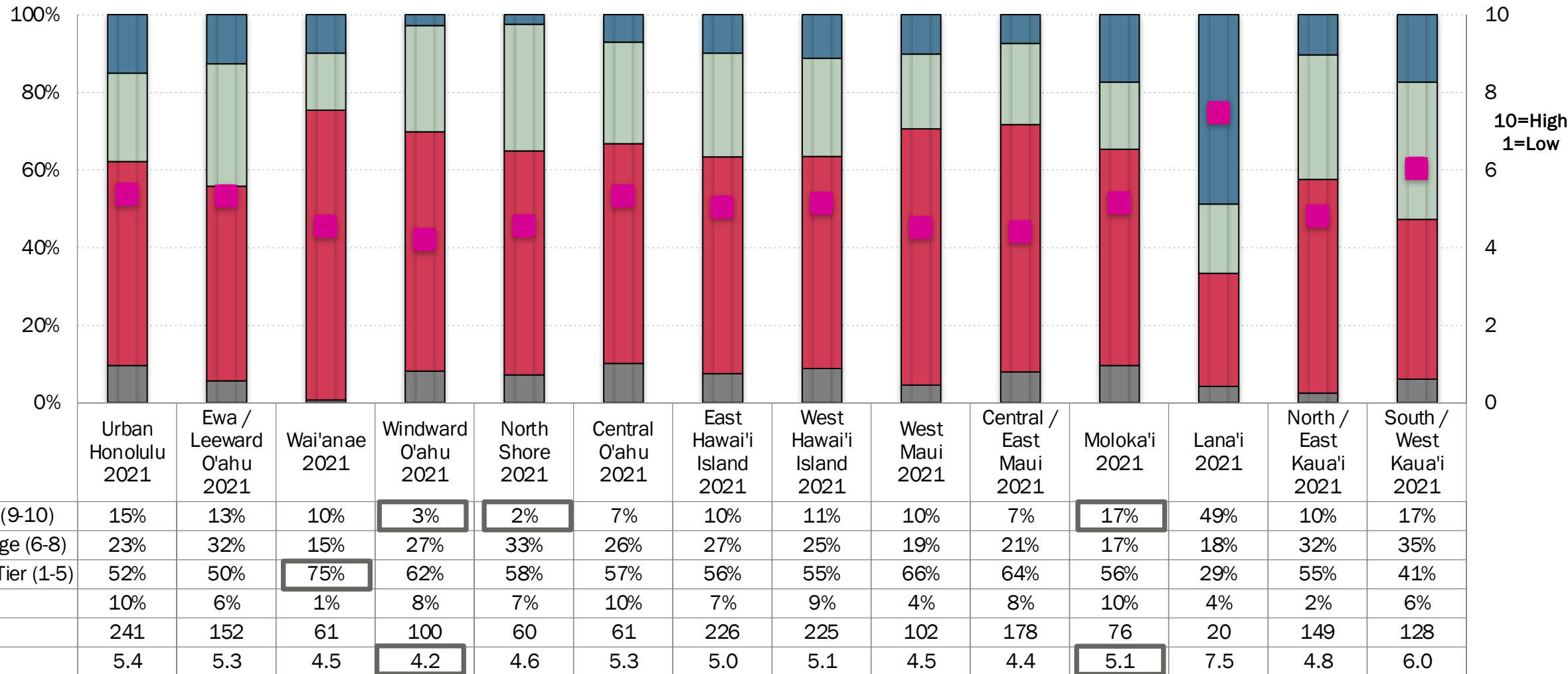
Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - *By 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 tourism is being better managed on my island” - *By Area*

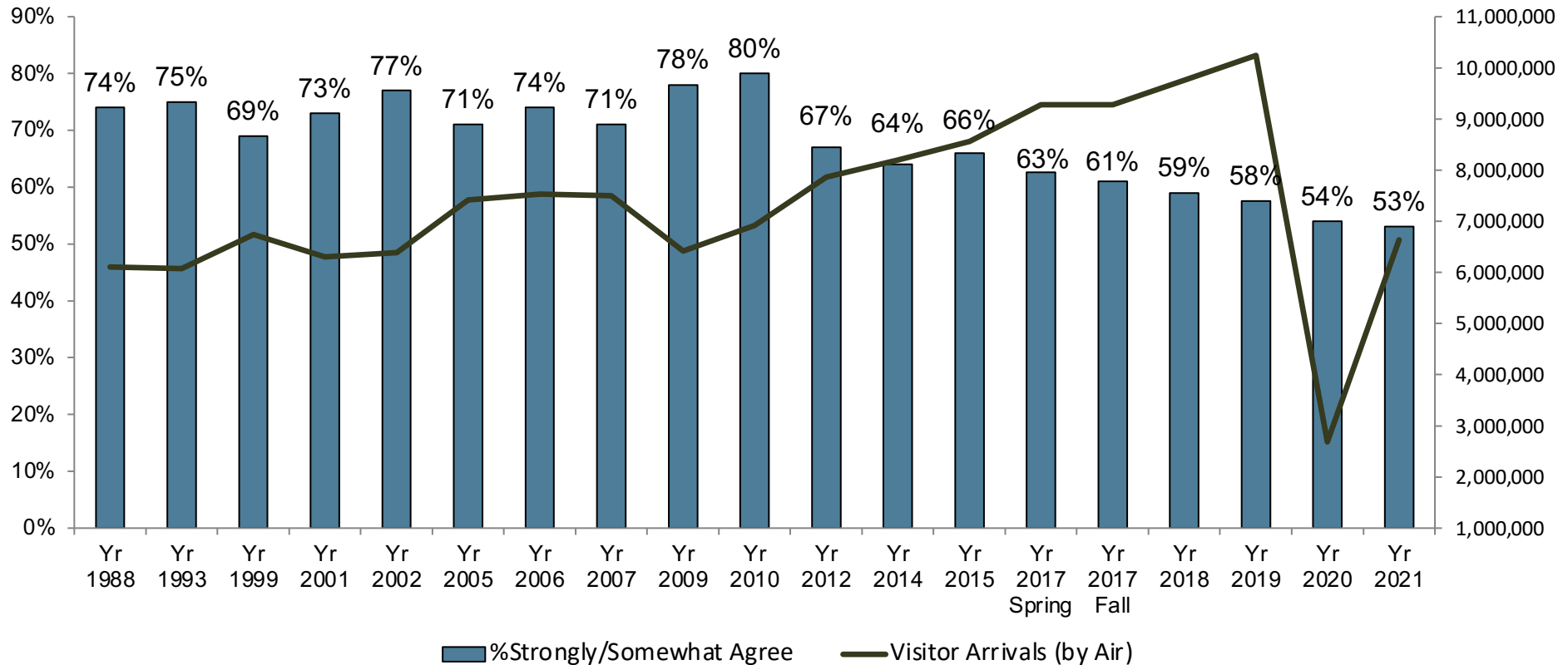


Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“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)

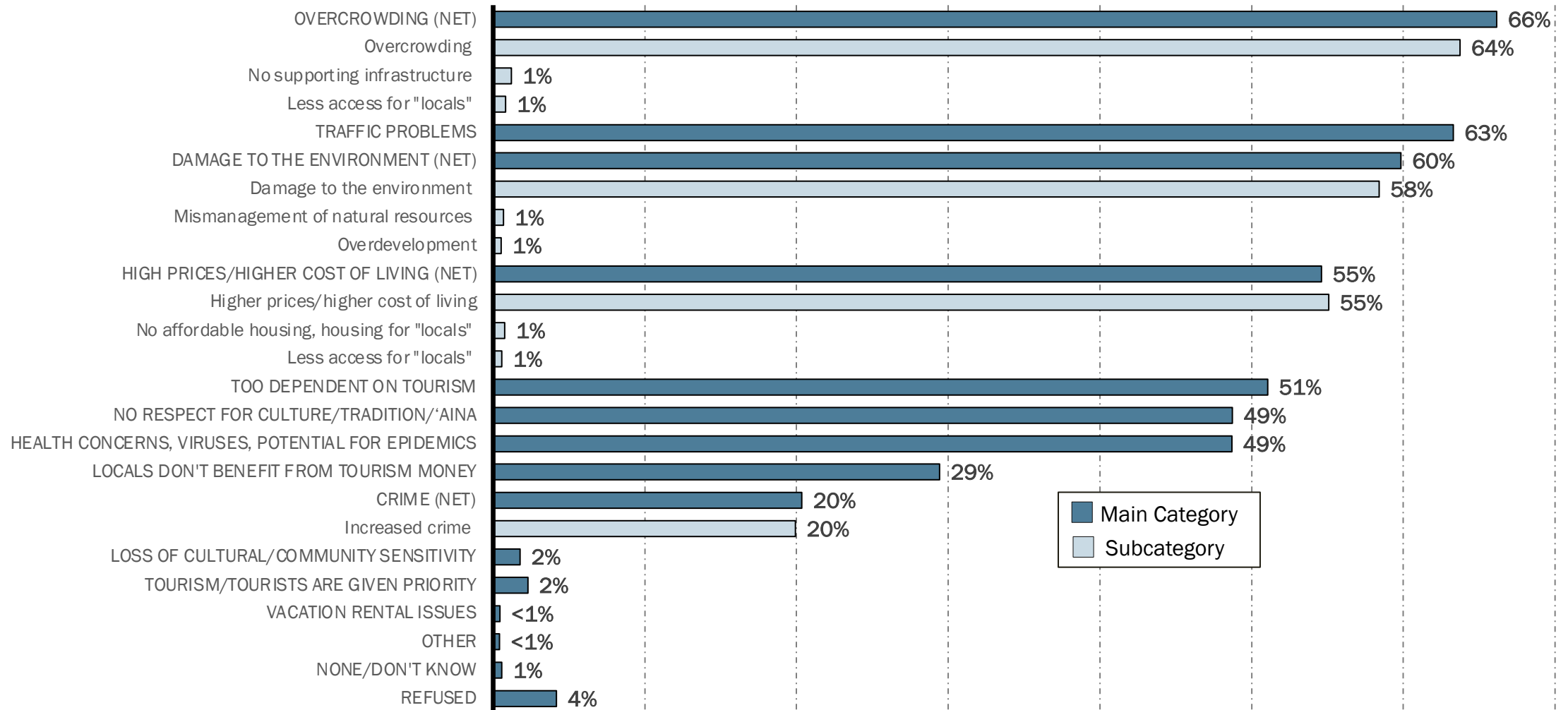
Annual Visitor Arrivals



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.

Problems Created by Tourism in Hawai'i (2021 only)

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

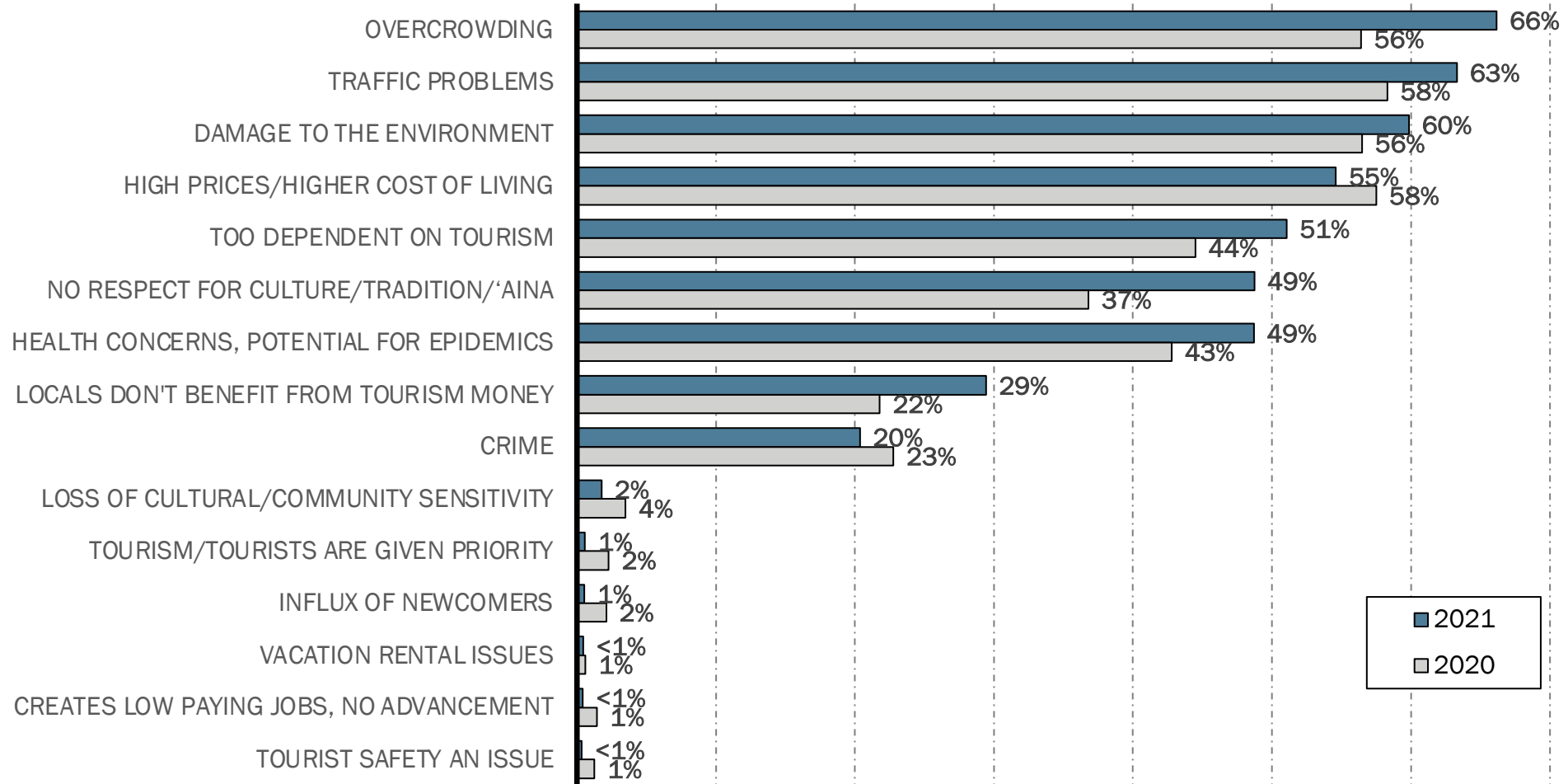


Base: 808

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

Problems Created by Tourism in Hawai'i (2021 vs. 2020)

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

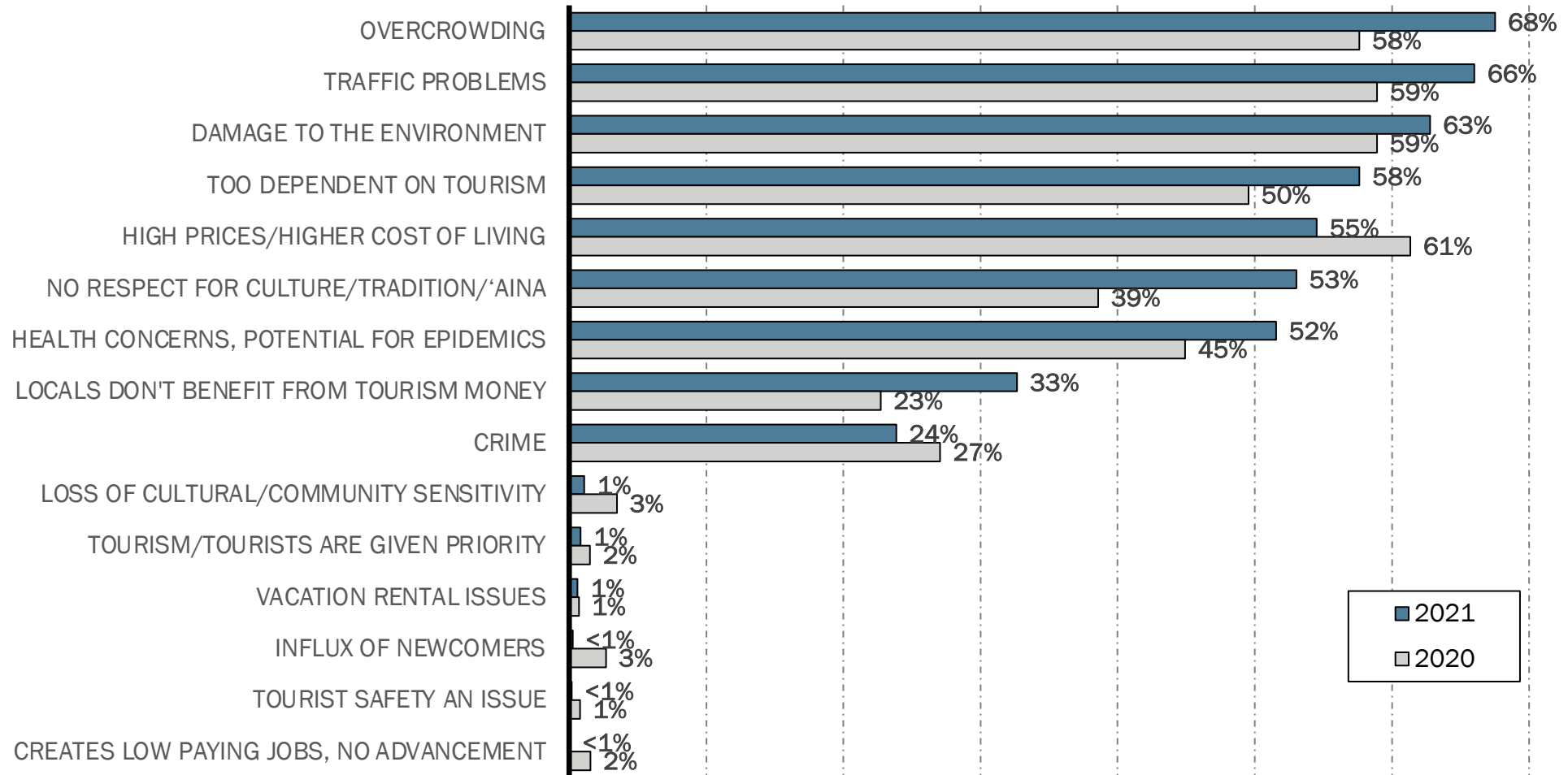


Base: 2021 (808), 2020 (734)

Q5. 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)

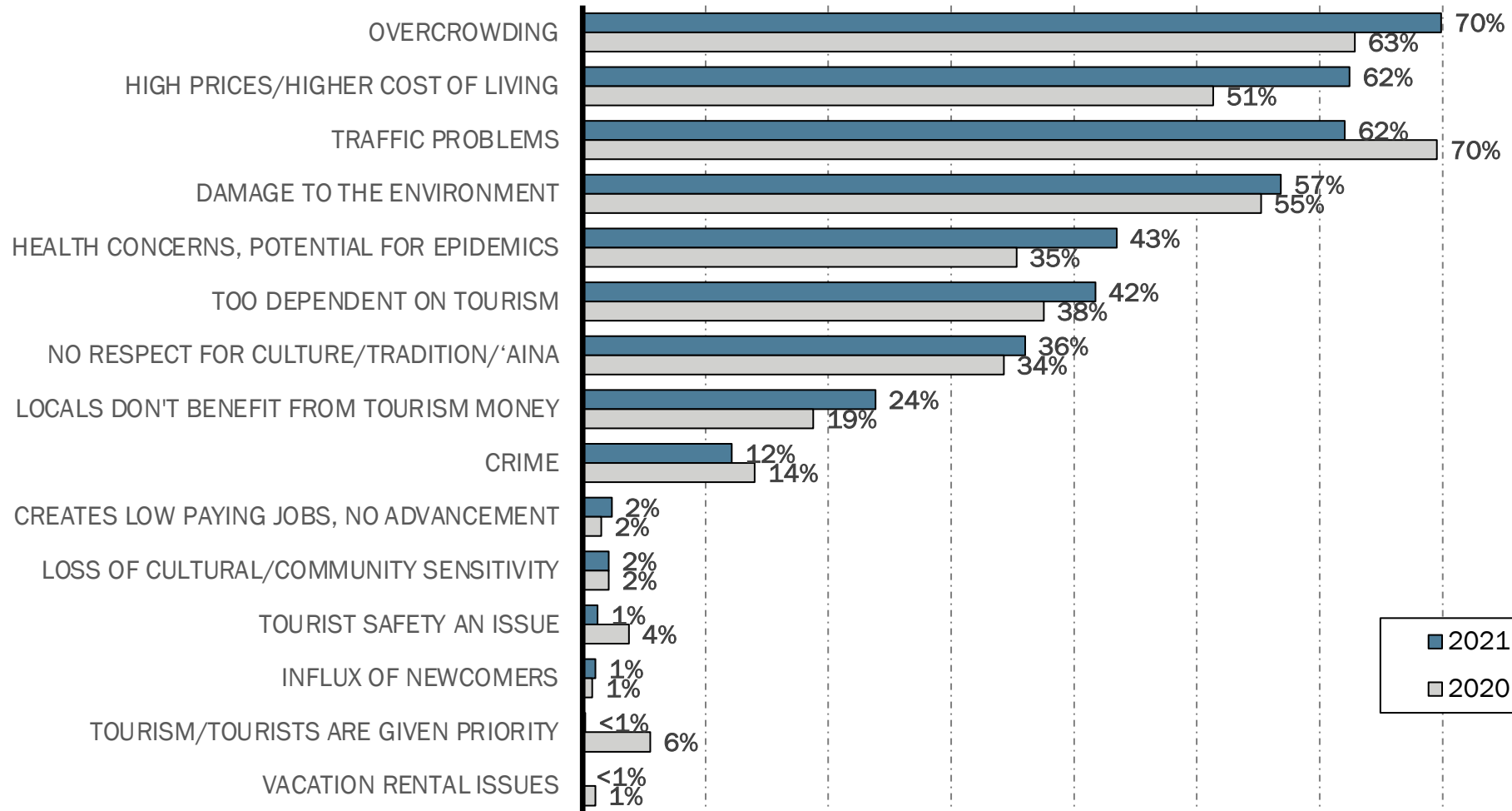


Base: 2021 (283), 2020 (266)

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

Problems Created by Tourism in Hawai'i: Maui County Residents

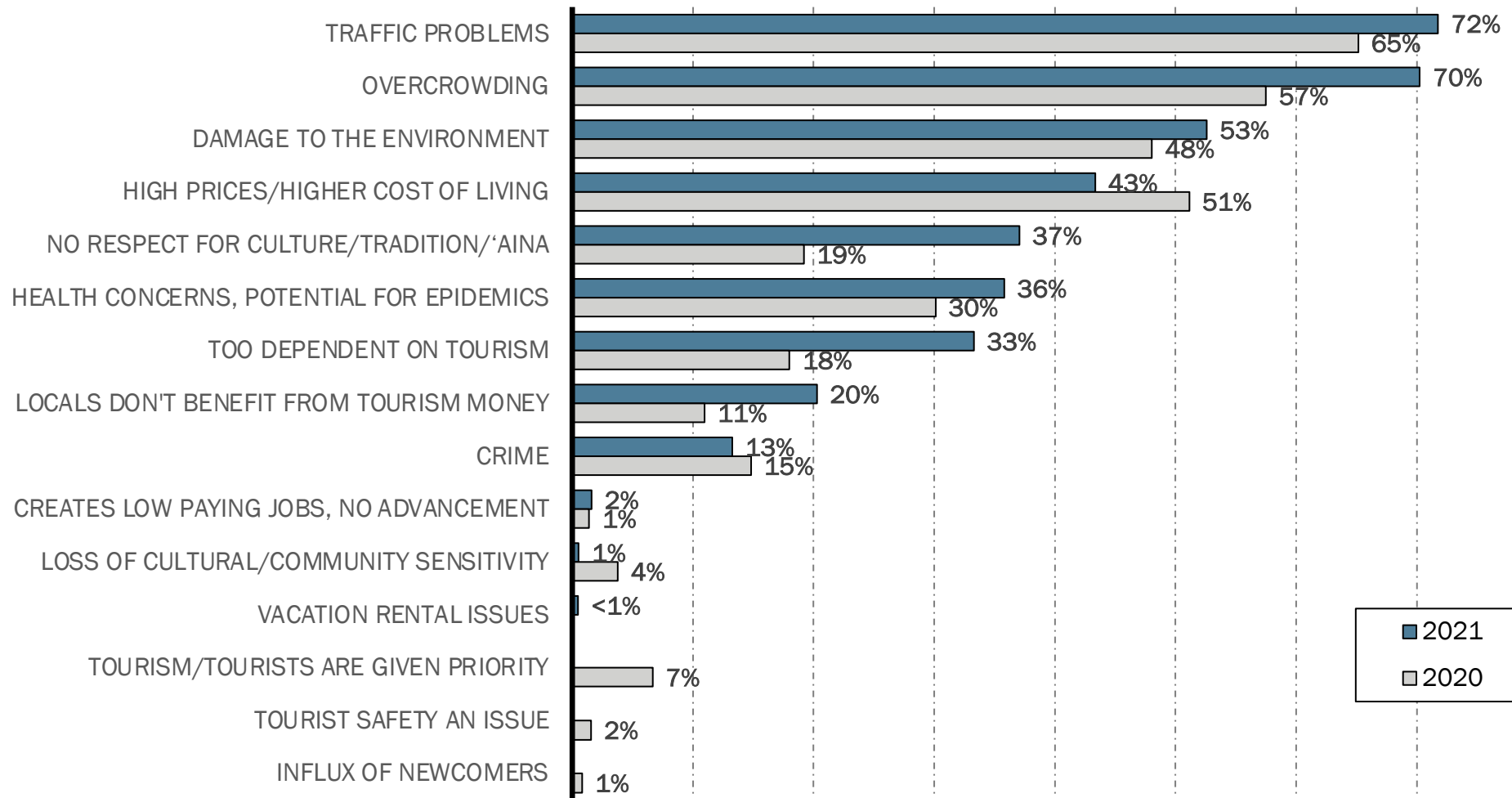
(According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 2021 (195), 2020 (189)

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

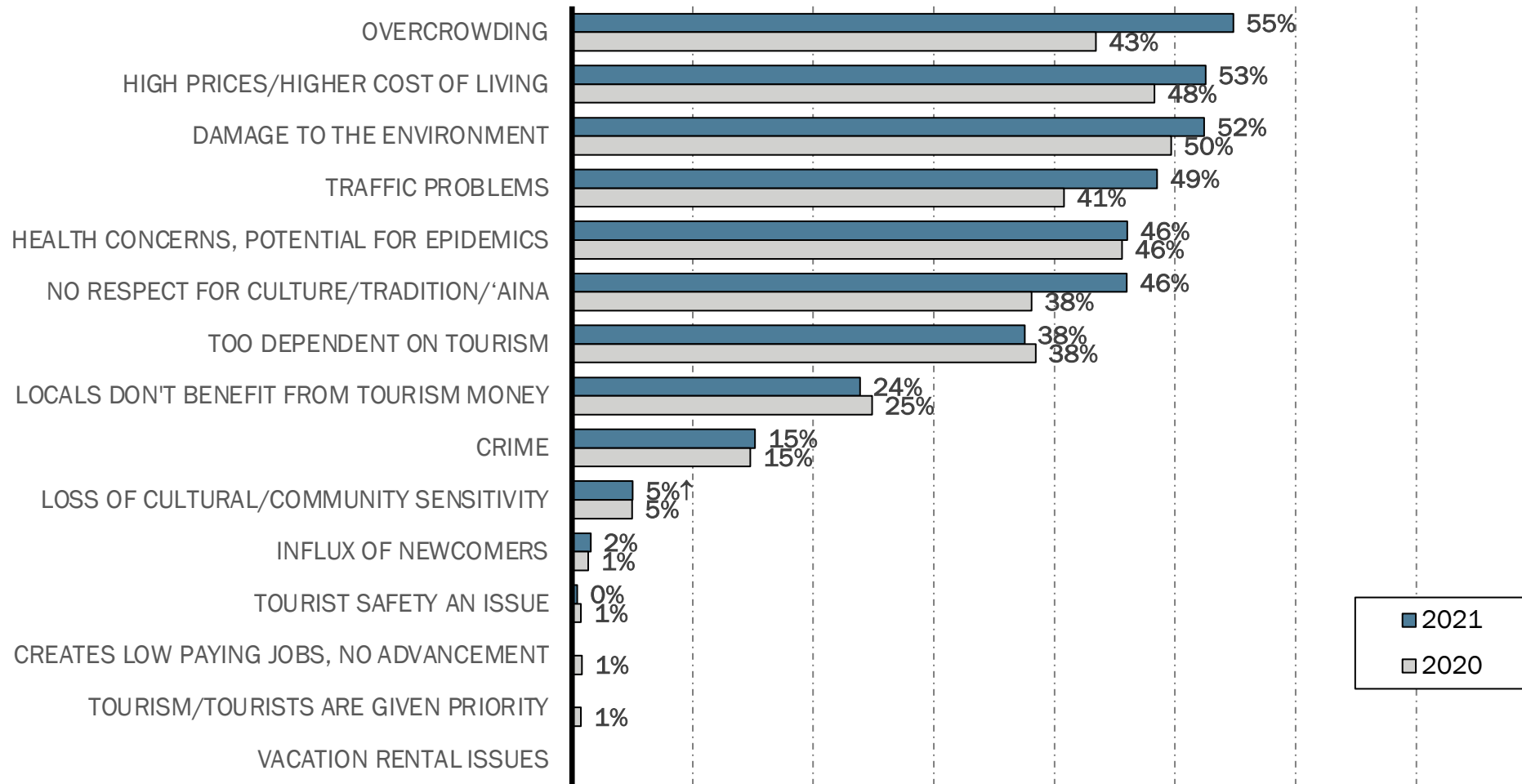
Problems Created by Tourism in Hawai'i: **Kaua'i Residents** (According to residents saying Hawai'i tourism creates more problems than benefits)



Base: 2021 (139), 2020 (95)

Q5. 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: 2021 (191), 2020 (184)

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

Ways Residents can Support Tourism in Hawai'i (2021 only)

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



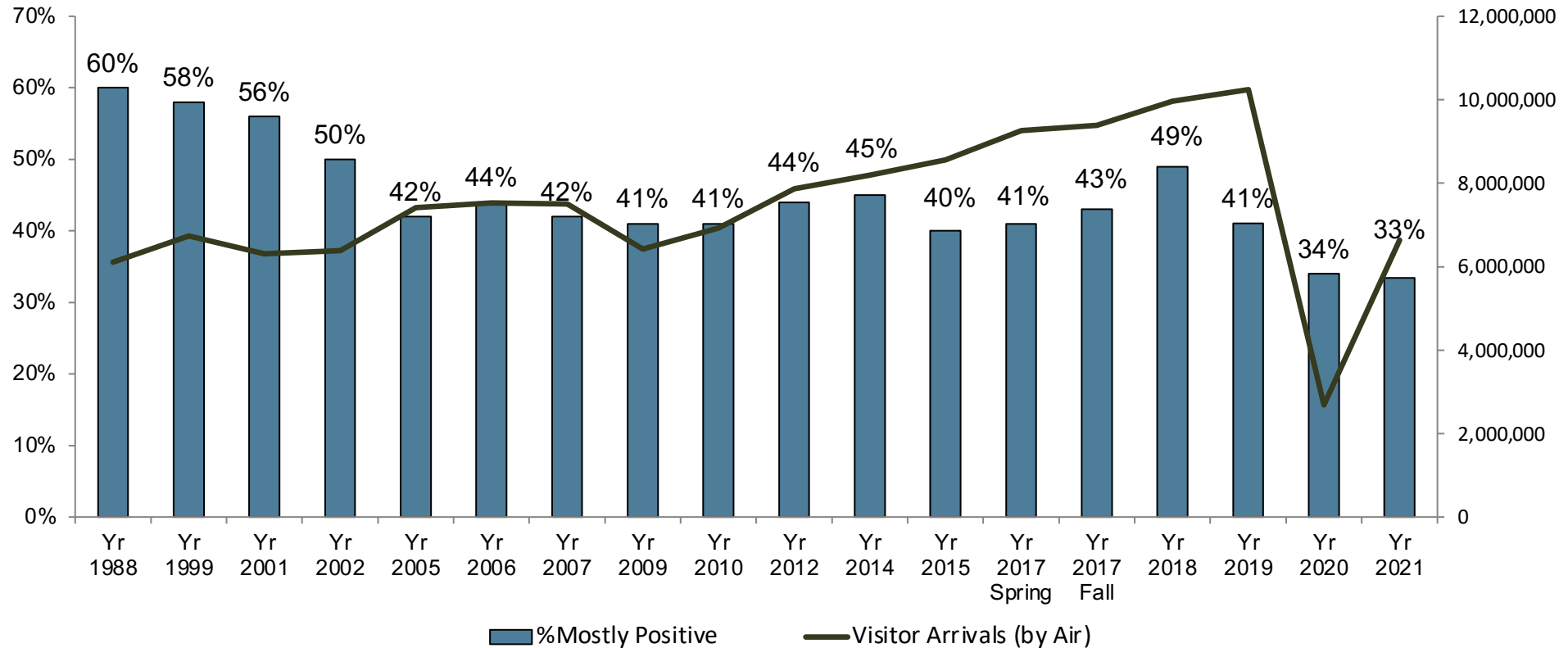
Base: 1144

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?

Impact on You & Your Family

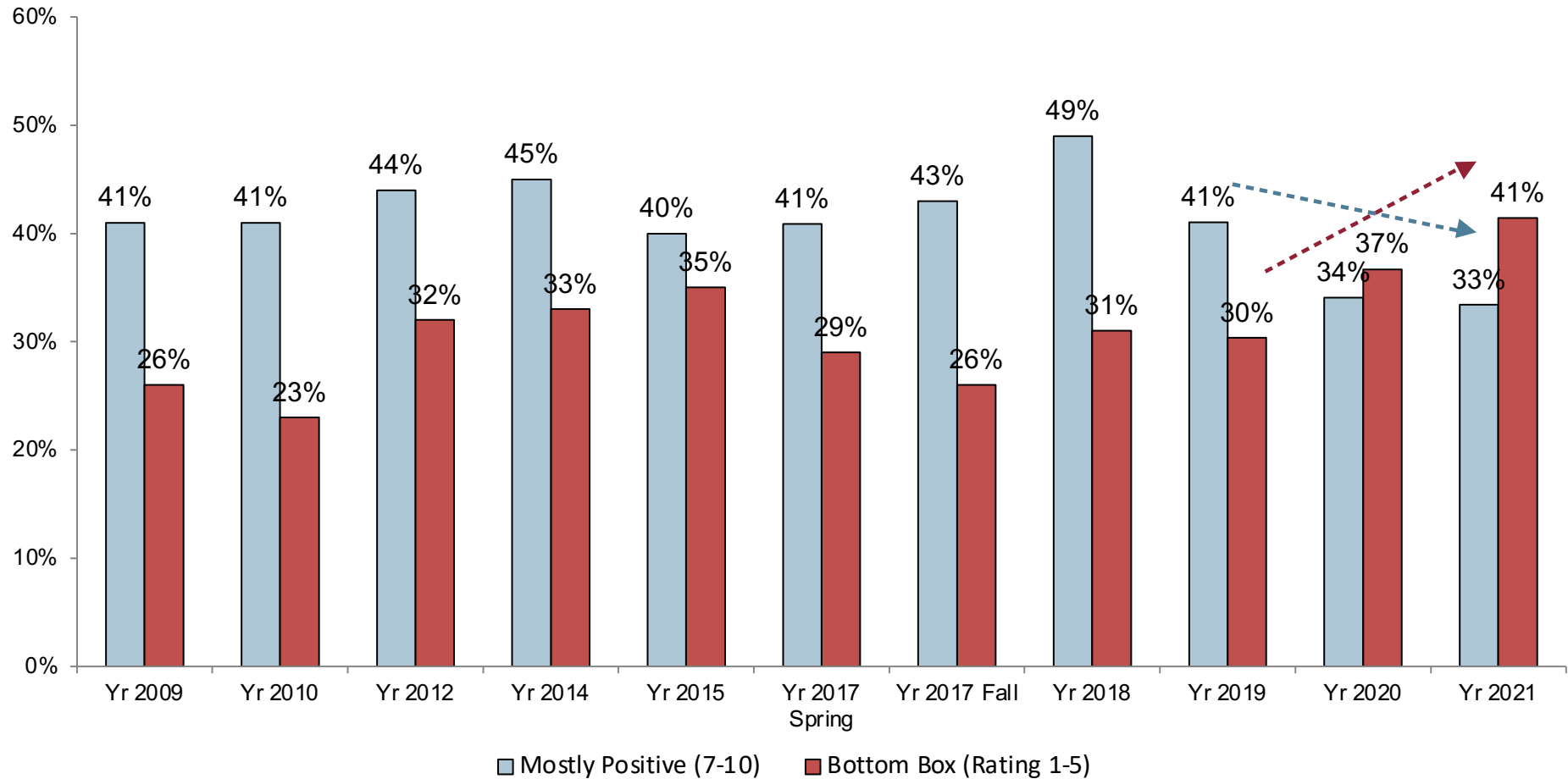
**% saying Tourism has been “mostly positive”
for you and your family**
(Rating of 7-to-10 on 10 Point Scale)

Annual Visitor Arrivals



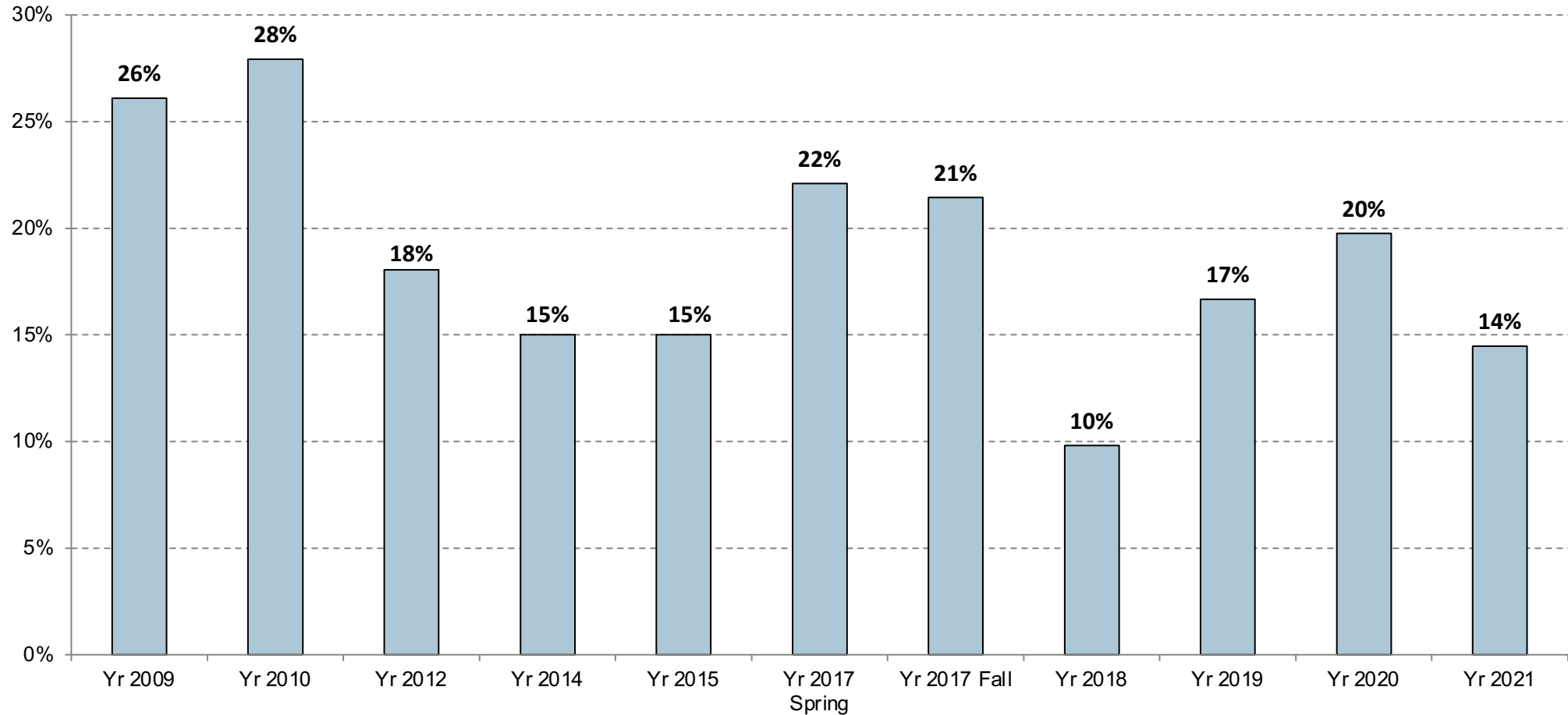
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family



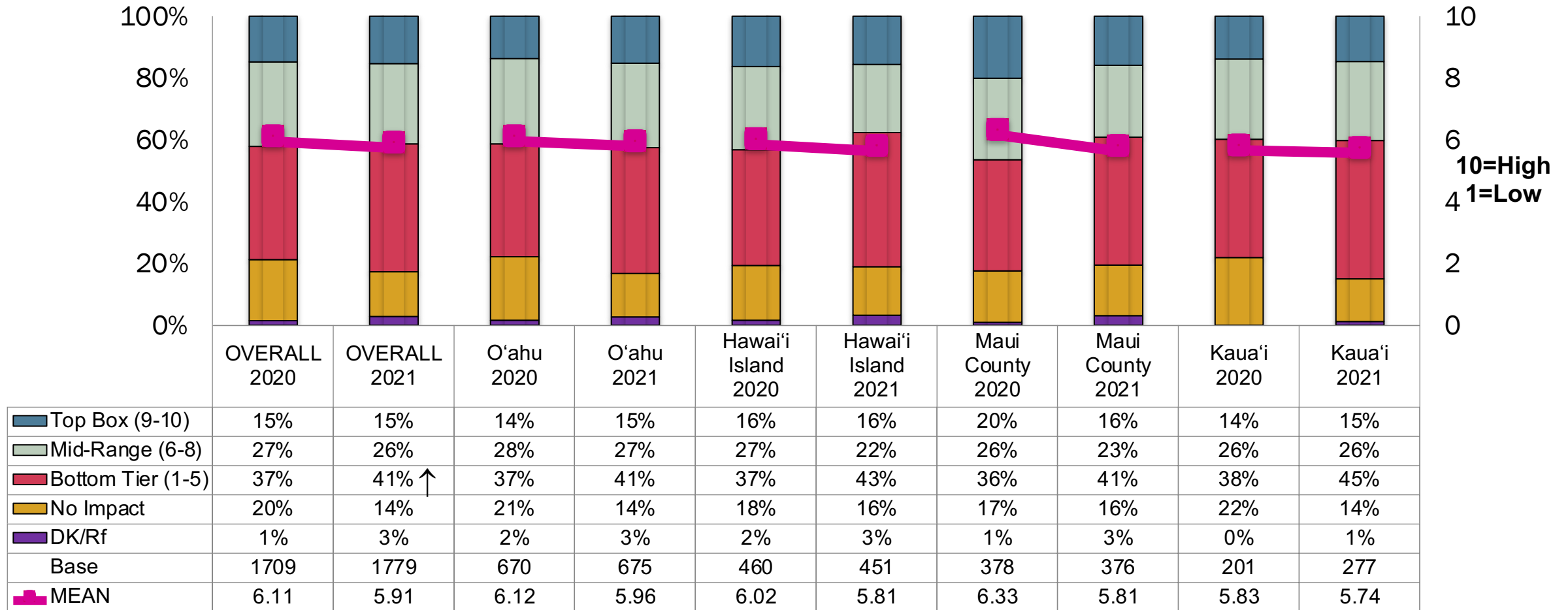
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – No Impact



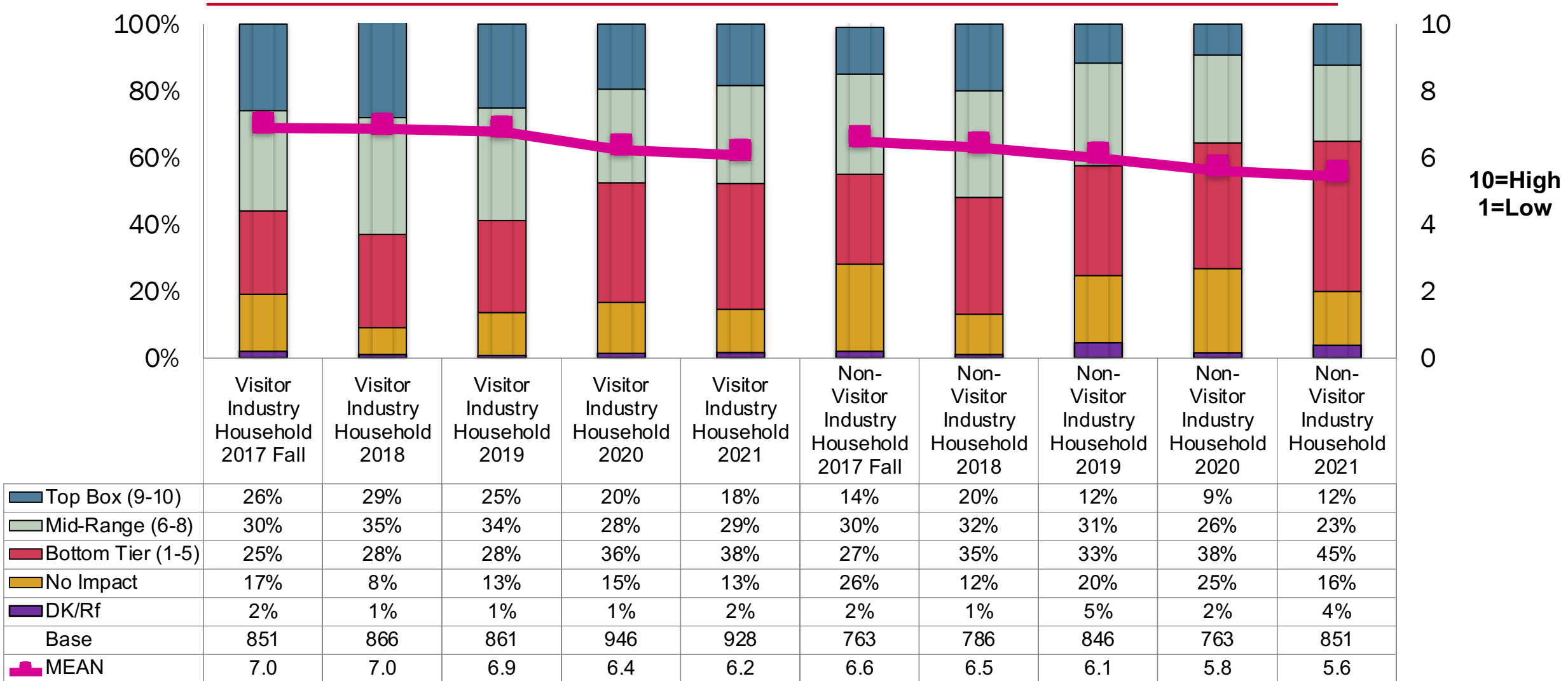
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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?

Impact of Tourism on You & Your Family- Visitor Industry Household vs Non-Visitor Industry Household

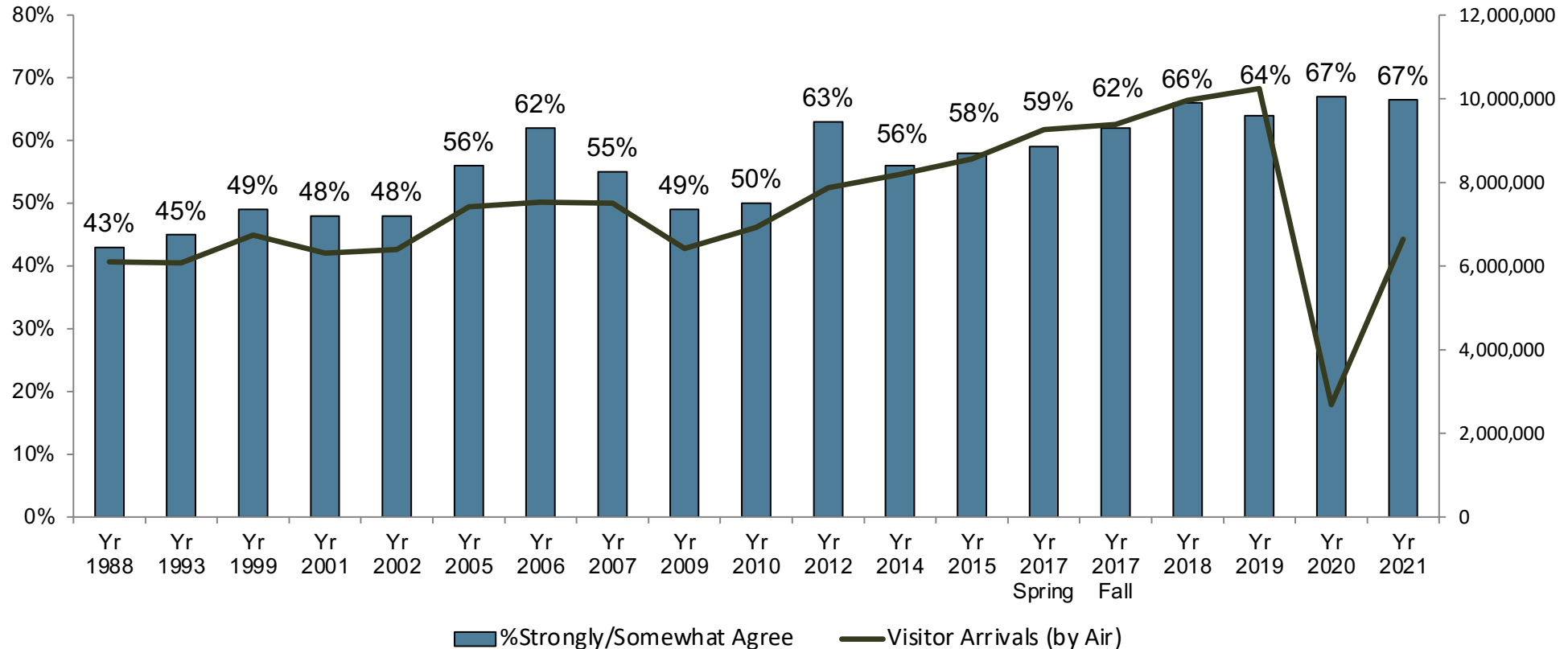


Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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

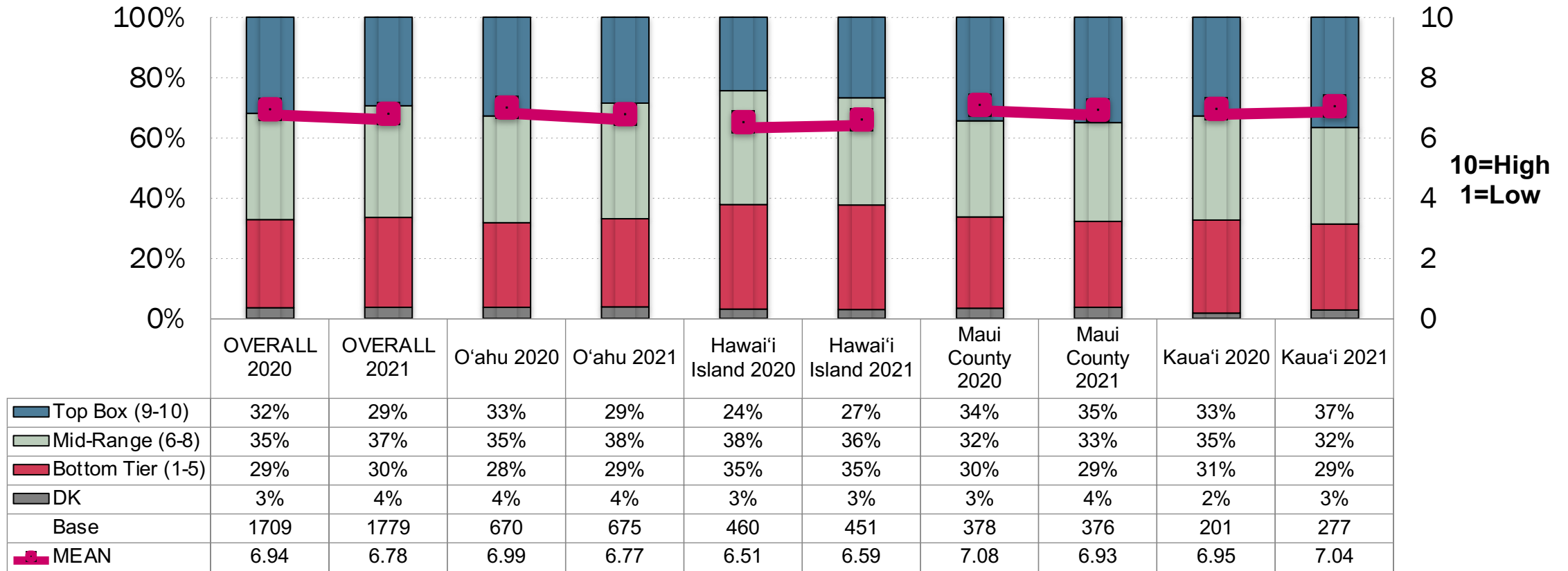
% strongly/ somewhat agree island is being run for tourists at expense of local people
(Rating of 6 to 10)

Annual Visitor Arrivals



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.

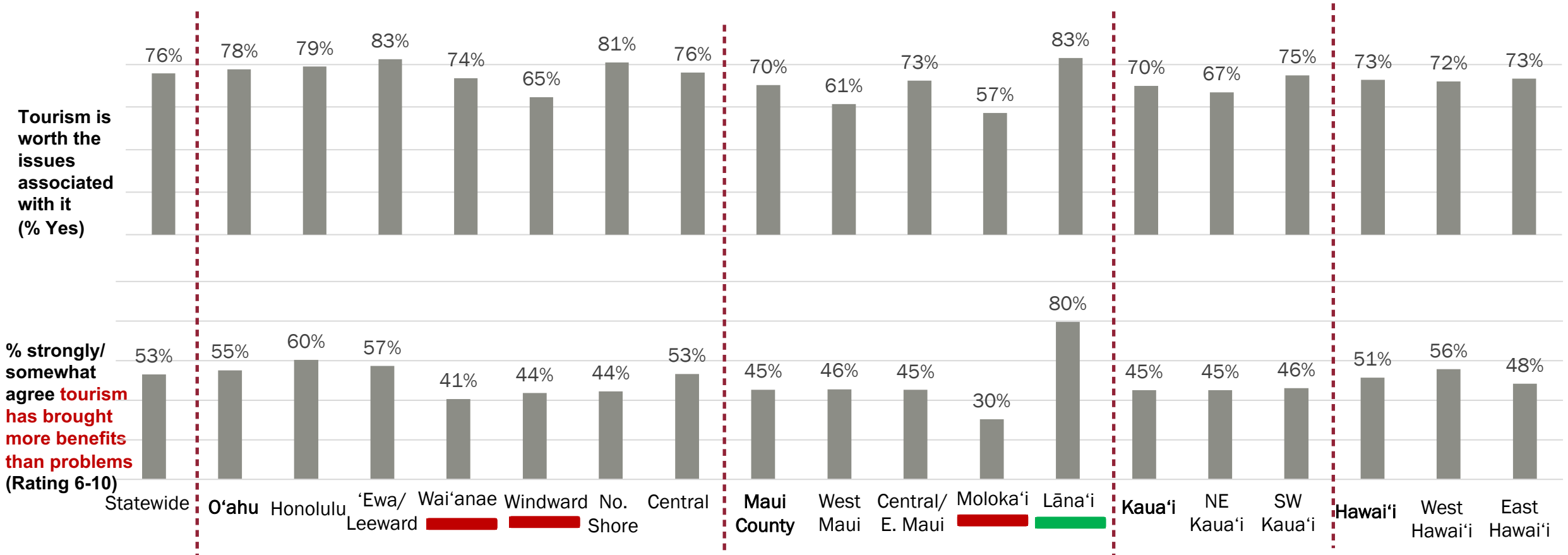
“This island is being run for tourists at the expense of local people” – *By Island*



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.

Executive Summary – Tourism worth the issues/Benefits outweigh Problems by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on the islands of O’ahu – Wai’anae and Windward - and Moloka’i, and less so on Lāna’i.

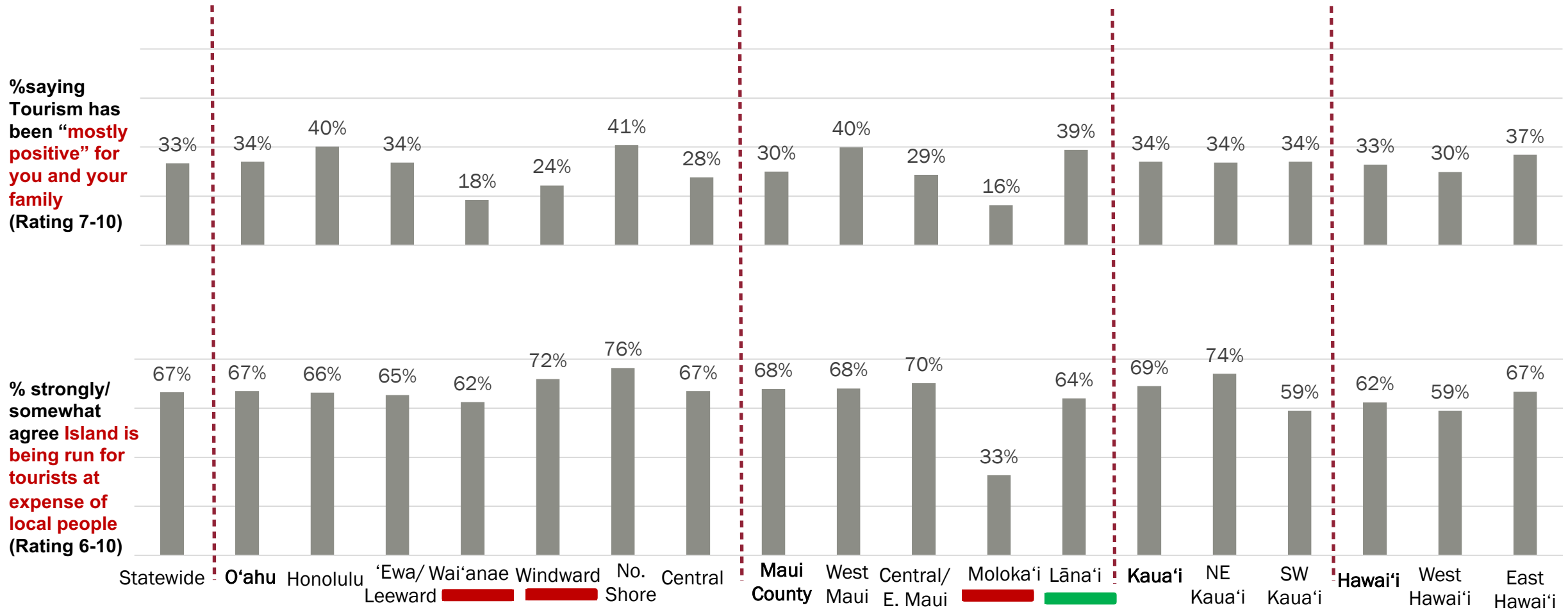


Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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.

Executive Summary – Resident Sentiment by Island/Area

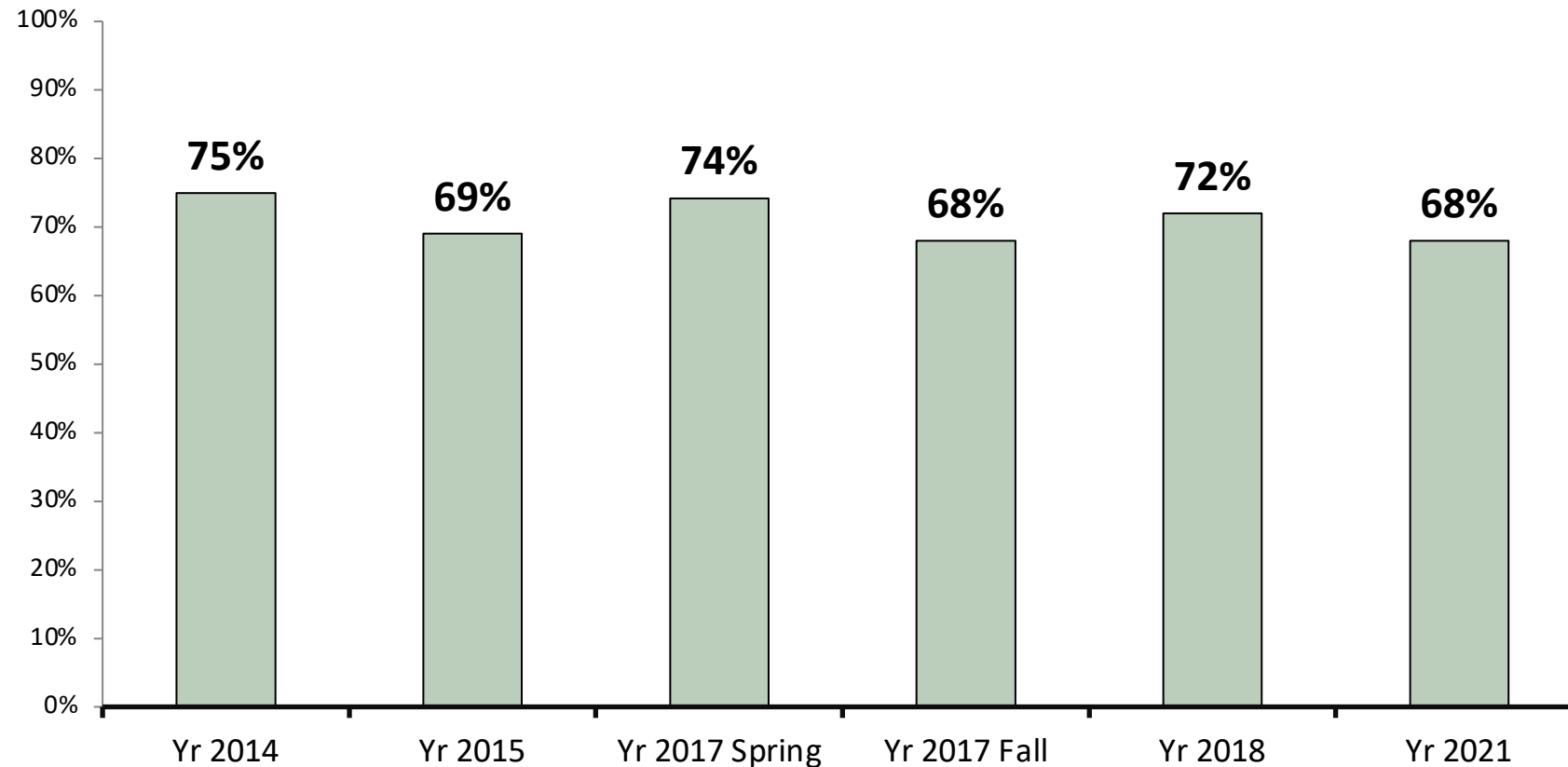
On the geographic level, residents were particularly critical of tourism and its impact on the islands of O’ahu – Wai’anae and Windward - and Moloka’i, and less so on Lāna’i.



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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?

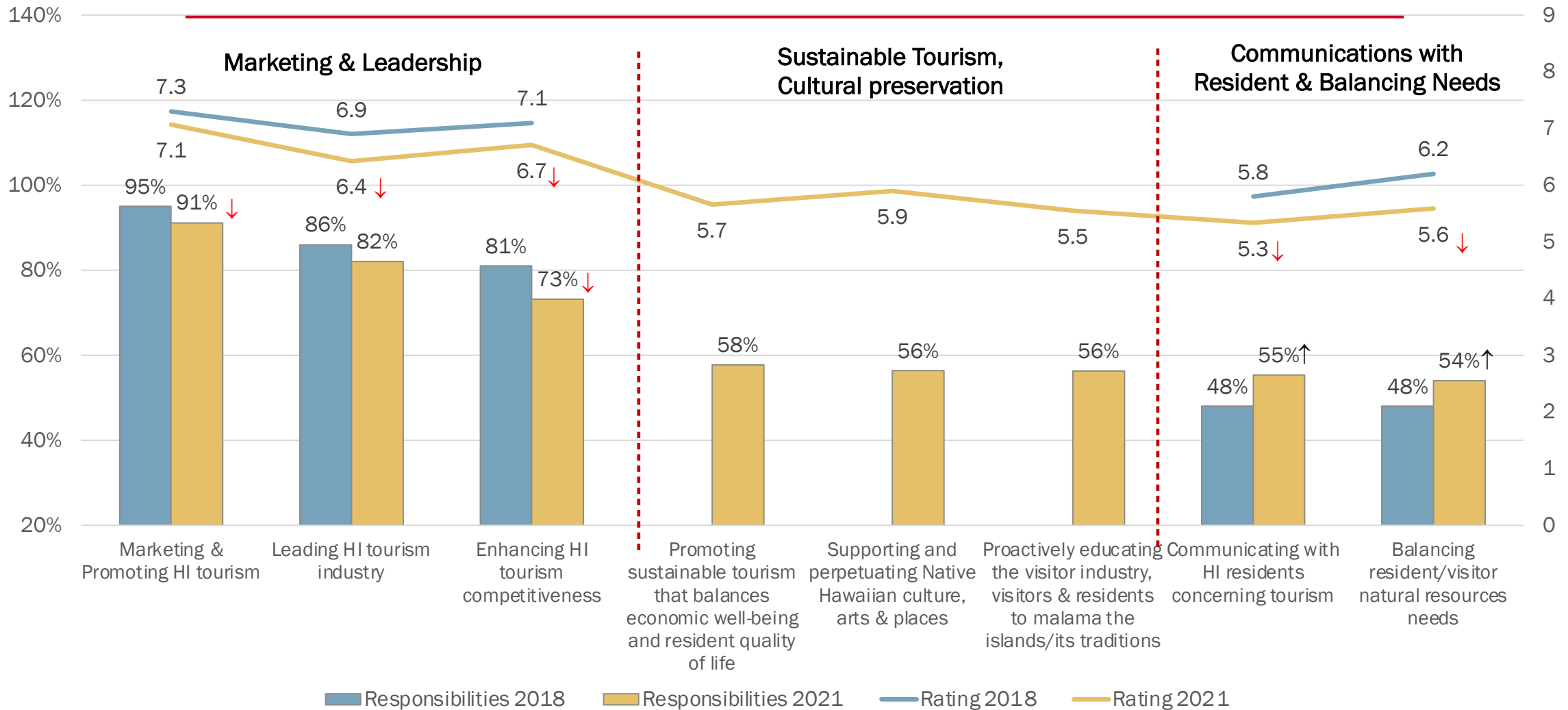
Hawai'i Tourism Authority Aided Name Awareness



Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

Awareness of Hawai'i Tourism Authority Roles & Satisfaction with Roles

(i.e., satisfaction measured among residents aware that HTA is responsible for each area)



Q9a. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for?

Q9b. 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.....?