

HTA Resident Sentiment Survey 2019 Highlights



Prepared for Hawai'i Tourism Authority
February 2020
Field Dates: September 27 to November 14, 2019

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?

1

With Hawai'i's visitor industry heading toward its eighth consecutive year of record visitor arrivals to the state, resident sentiment has generally weakened, though the key indicators showed mixed results.

2

The visitor industry's impact on residents' overall quality of life becomes key to improving resident sentiment, as resident attitudes shift toward seeking an equal balance of Economic/Social and Cultural/Community benefits from the industry.

3

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

- Provide residents with a voice in tourism development
- Create jobs with opportunities for advancement
- Create shopping, restaurants and entertainment opportunities

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 (26%) and cellular (15%) phones; and an online component (59%).

Statewide sampling produced a total of $n = 1,707$ (i.e., up from 1,635 in 2018) respondents as follows:

- O'ahu: 683 (+74 from 609 in 2018 to increase sample from North Shore area)
- Hawai'i Island: 451 (Same)
- Maui County: 373 (-2 from 375 in 2018)
- Kaua'i: 200 (Same)

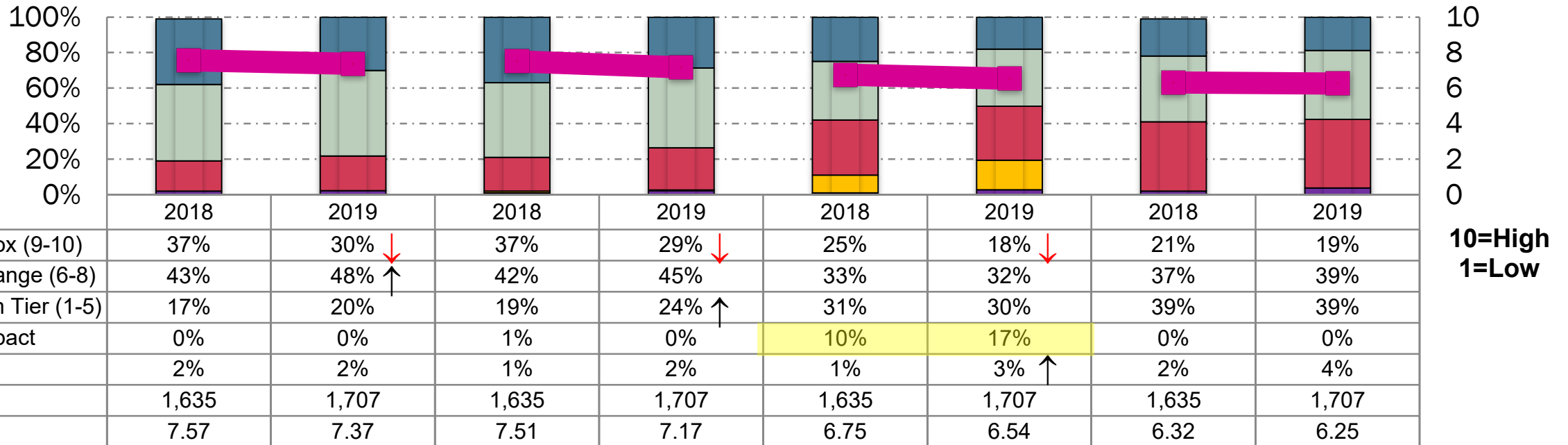
Methodology

- 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: Online: September 27 to November 12, 2019; Phone: September 28 to November 14, 2019

Key Resident Sentiment Indicators – Impact of Hawai‘i Tourism

Significant Decline Significant Decline Significant Decline Decline

Perception of tourism industry in Hawai‘i - Favorability Perceived impact of tourism on the State Perceived impact of tourism on You and Your Family 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 Hawai'i Tourism

Significant Decline Relatively Stable Significant Decline Relatively Stable Significant Decline

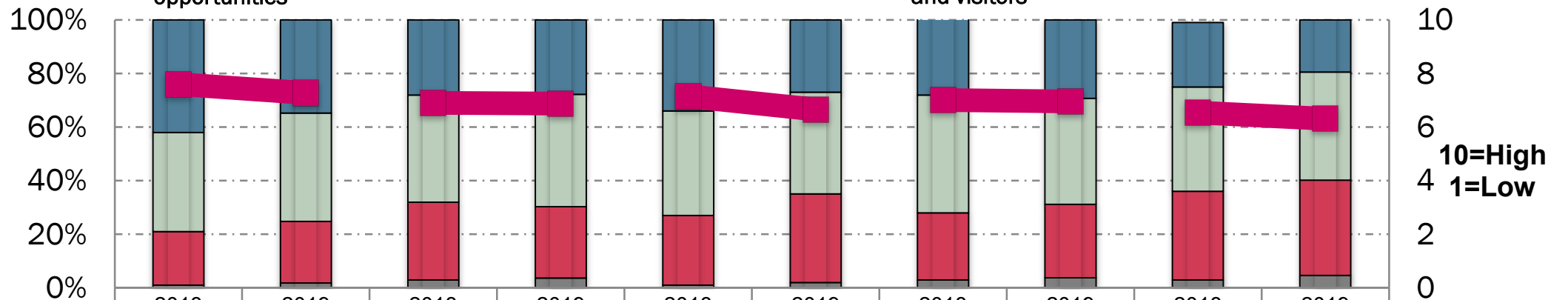
Creates shopping, restaurants & entertainment opportunities

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 residents to be involved



	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
Top Box (9-10)	42%	35% ↓	28%	28%	34%	27% ↓	29%	29%	24%	19% ↓
Mid-Range (6-8)	37%	40%	40%	42%	39%	38%	44%	40%	39%	40%
Bottom Tier (1-5)	20%	23%	29%	27%	26%	33% ↑	25%	27%	33%	36%
DK	1%	2%	3%	4%	1%	2%	3%	4%	3%	5%
Base	1,635	1707	1,635	1707	1,635	1707	1,635	1707	1,635	1707
MEAN	7.60	7.28 ↓	6.90	6.88	7.15	6.66 ↓	7.01	6.95	6.54	6.31

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

Relatively Stable Relatively Stable Significant Decline Significant Decline Significant Decline

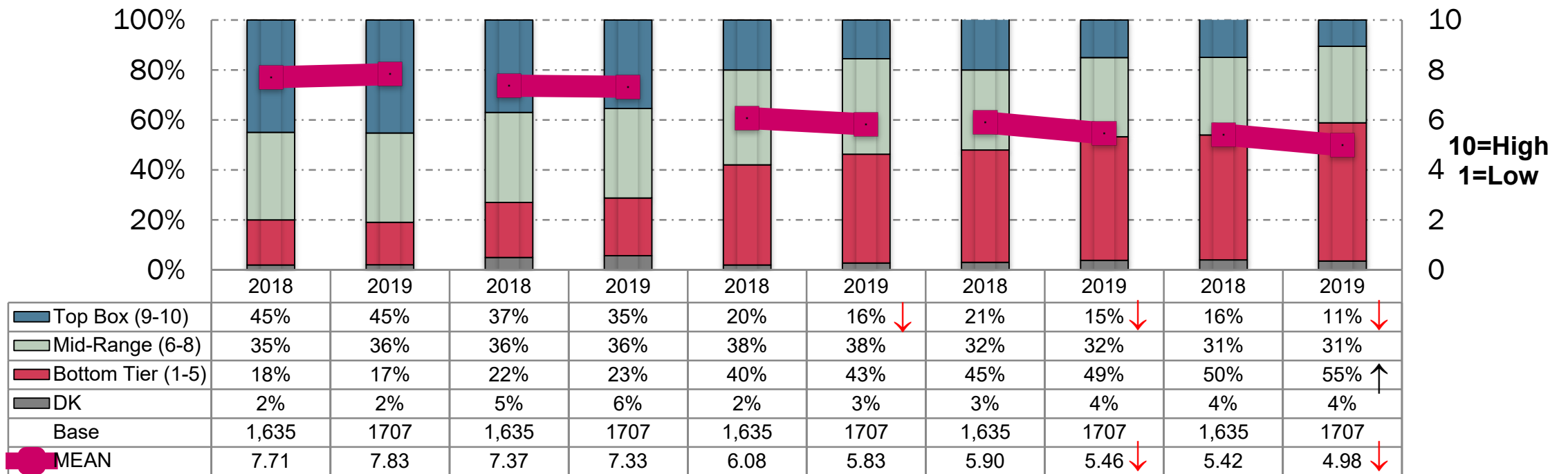
Tourism increases traffic problems

Tourism results in a higher cost of living

Enhances residents' quality of life

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

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

Decline

Decline

Significant Decline

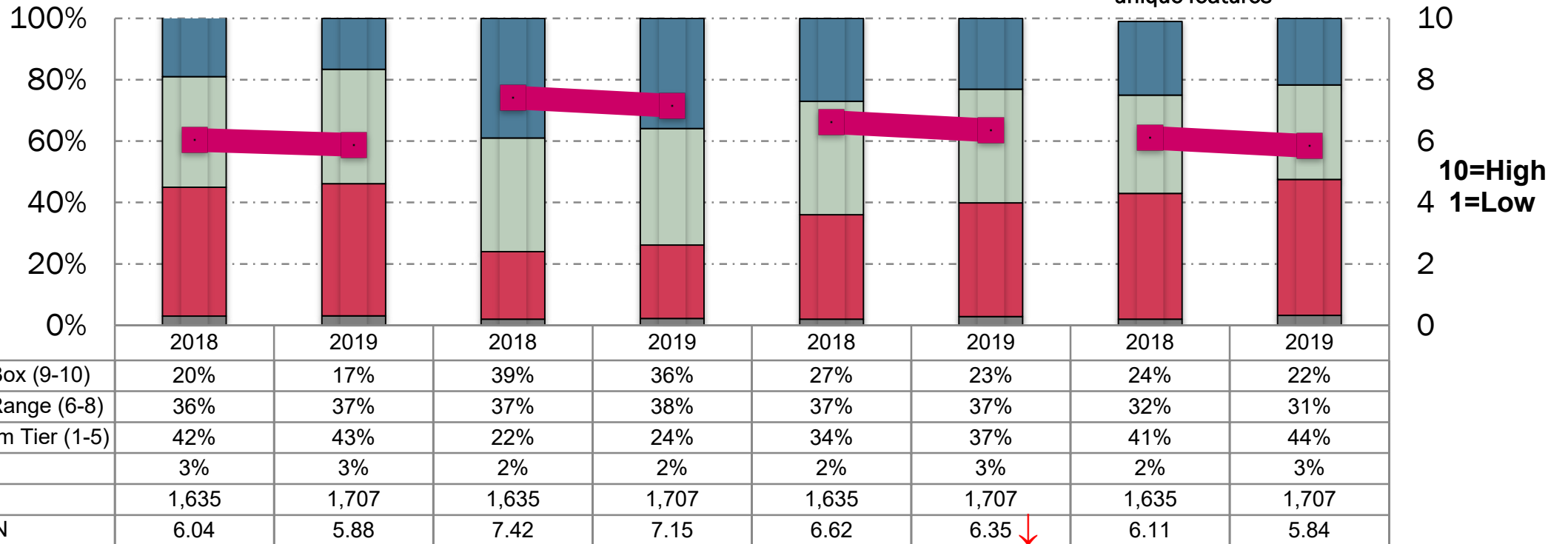
Decline

Funds should be spent to promote tourism in Hawai'i

Tourism reminds me we have a unique culture to share

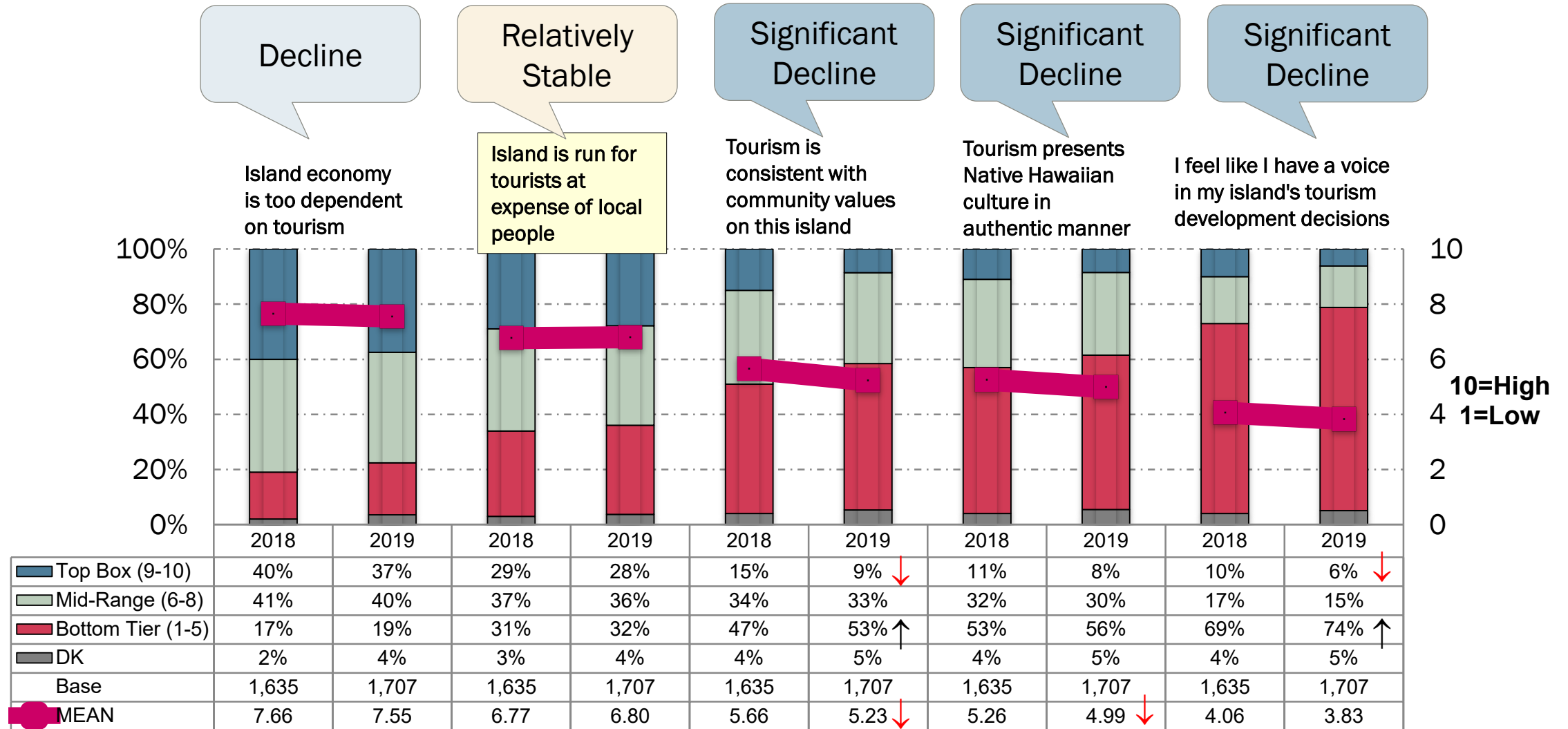
Tourism should be actively encouraged on my island

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



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

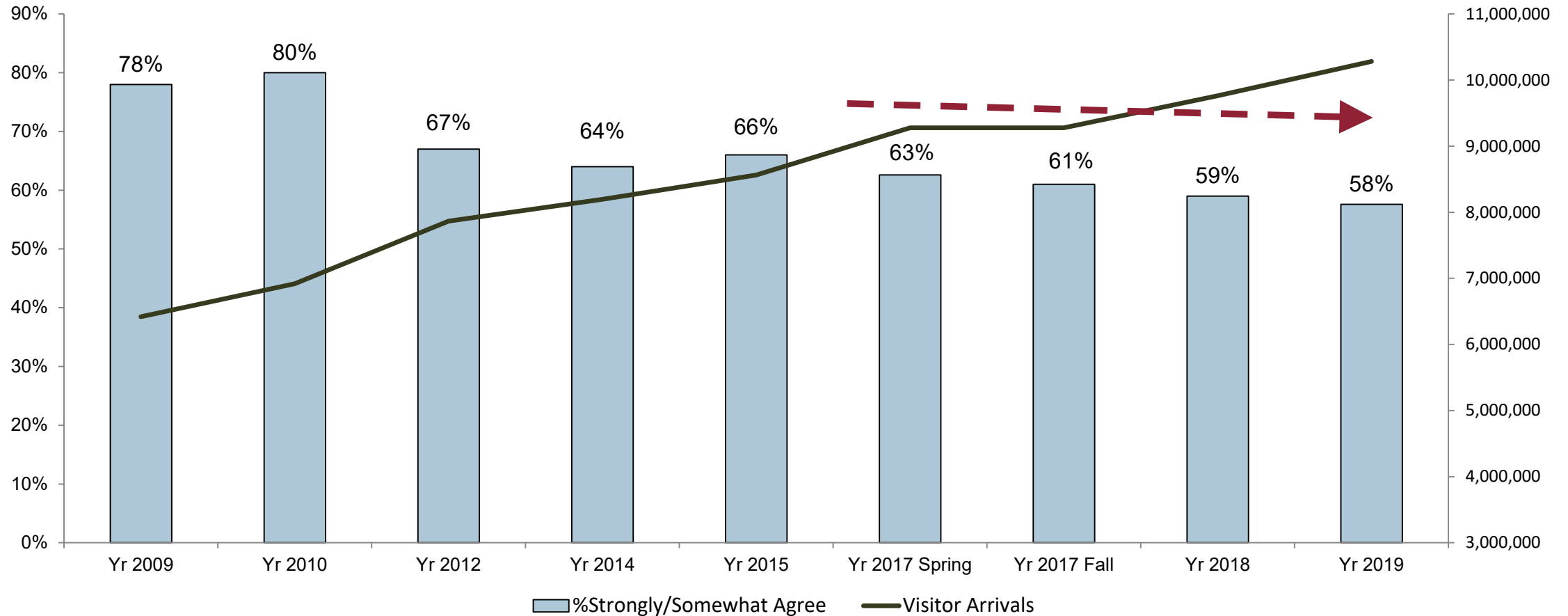


Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that ...

“Tourism has brought more benefits than problems”

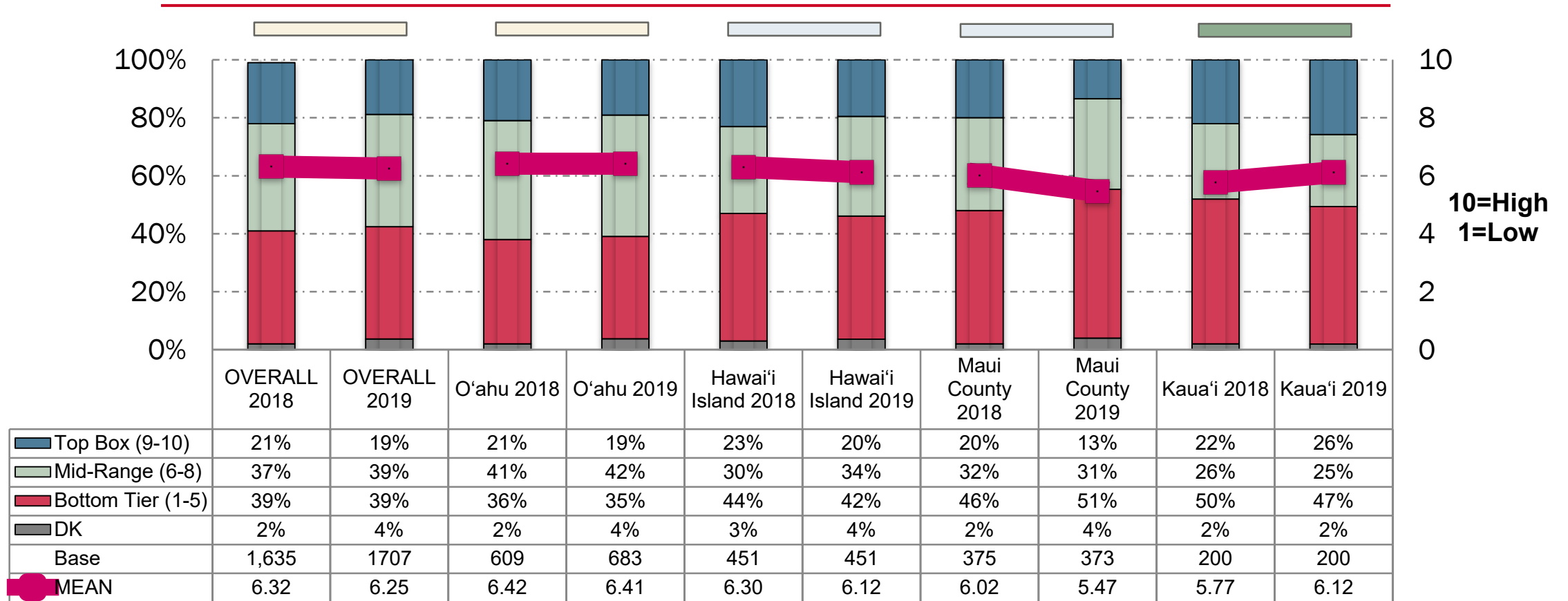
% Strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-to-10 on 10 Point Scale)

Annual Visitor Arrivals (by Air)



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...?

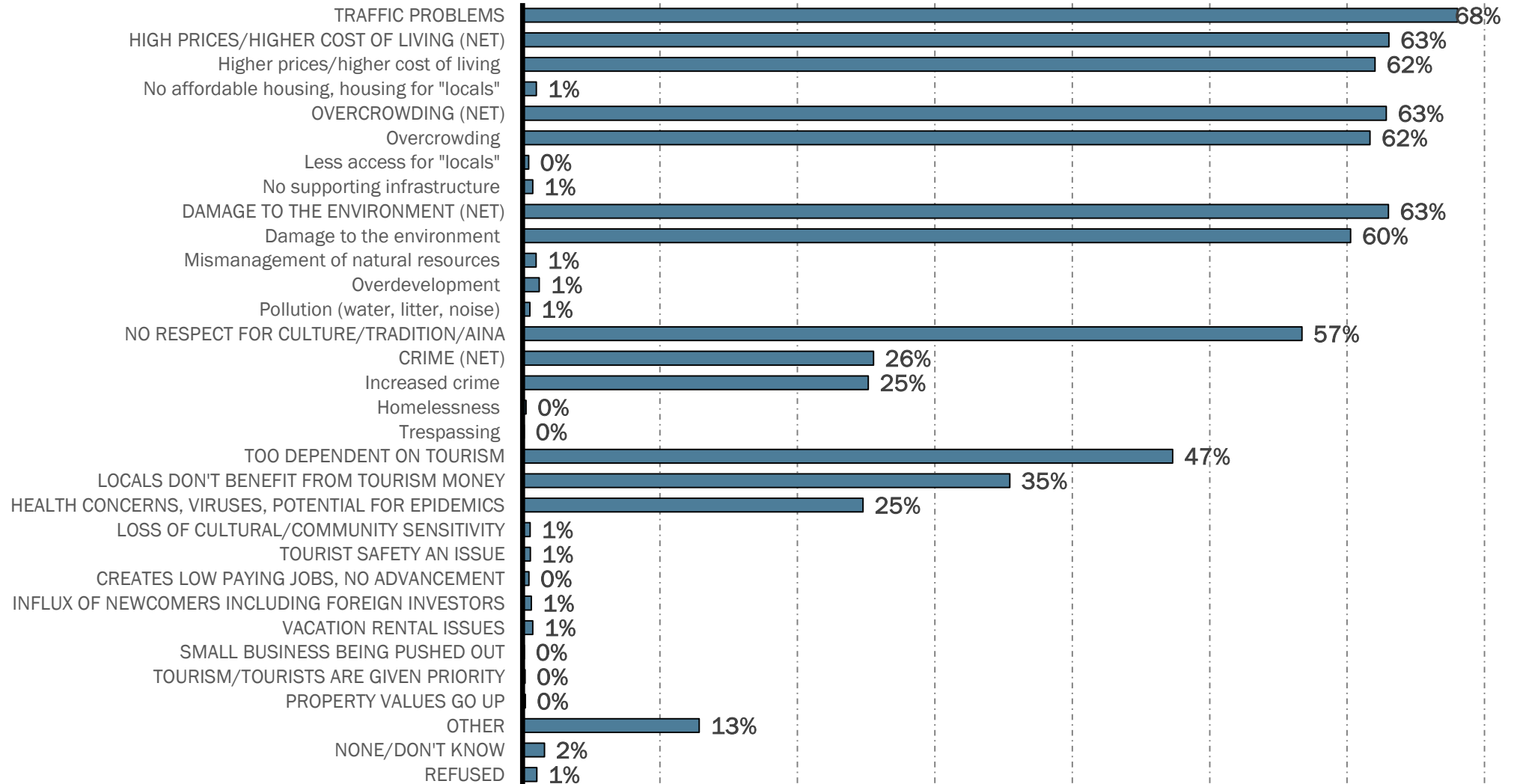
“Tourism has brought more benefits than problems” – *By Island*



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...?

Problems Created by Tourism in Hawai'i (2019 only)

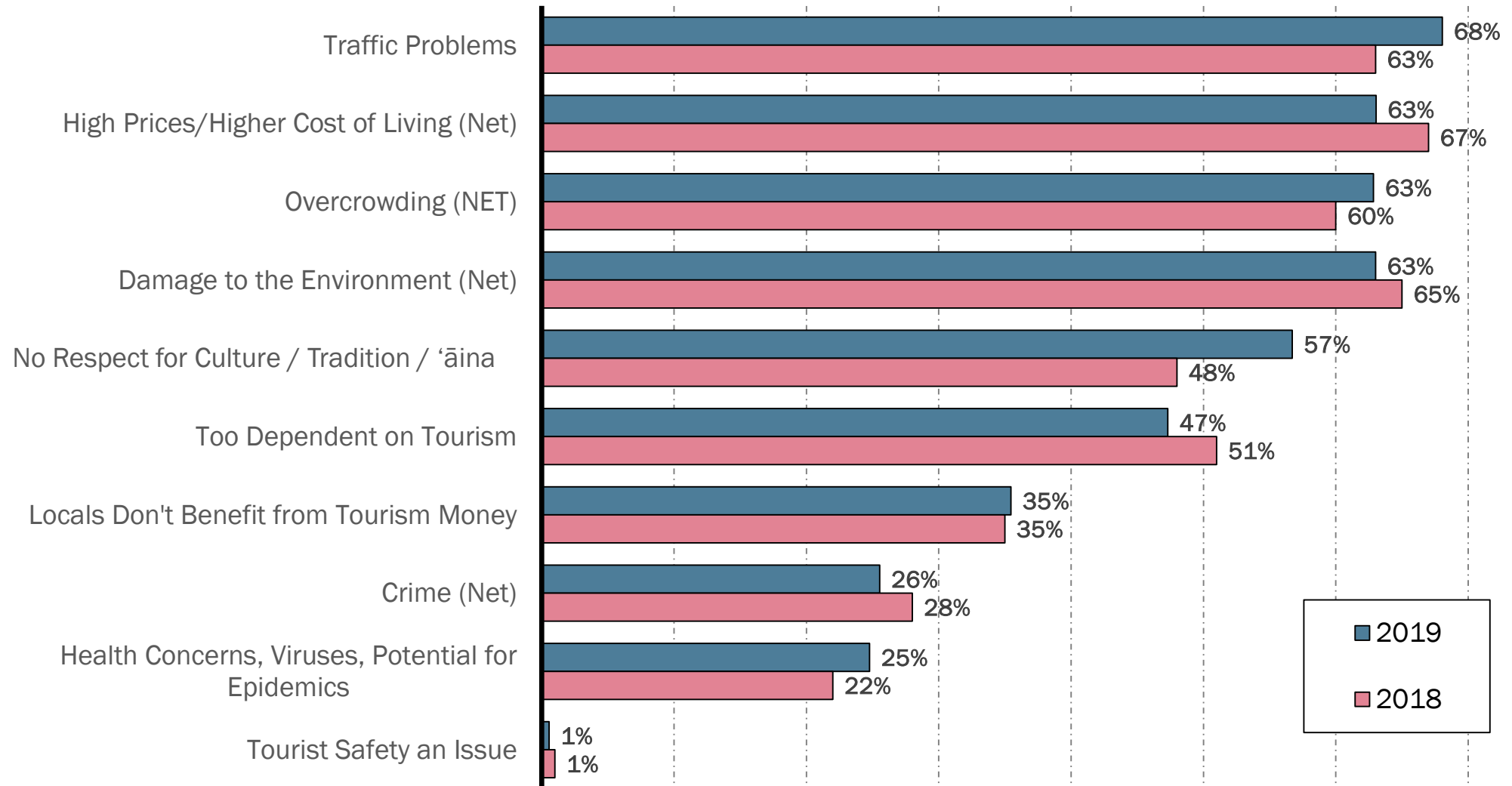
(According to residents saying Hawai'i tourism creates more problems than benefits)



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

Problems Created by Tourism in Hawai'i (Category Trends)

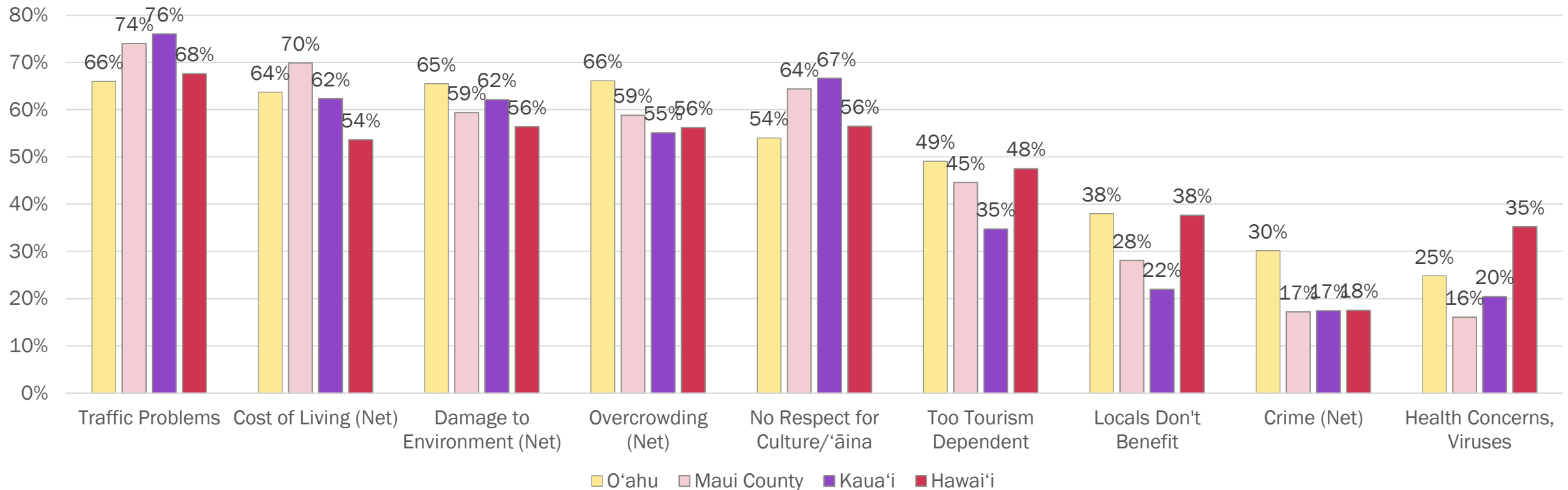
(According to residents saying Hawai'i tourism creates more problems than benefits)



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

Problems Created by Tourism in Hawai'i by Island

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

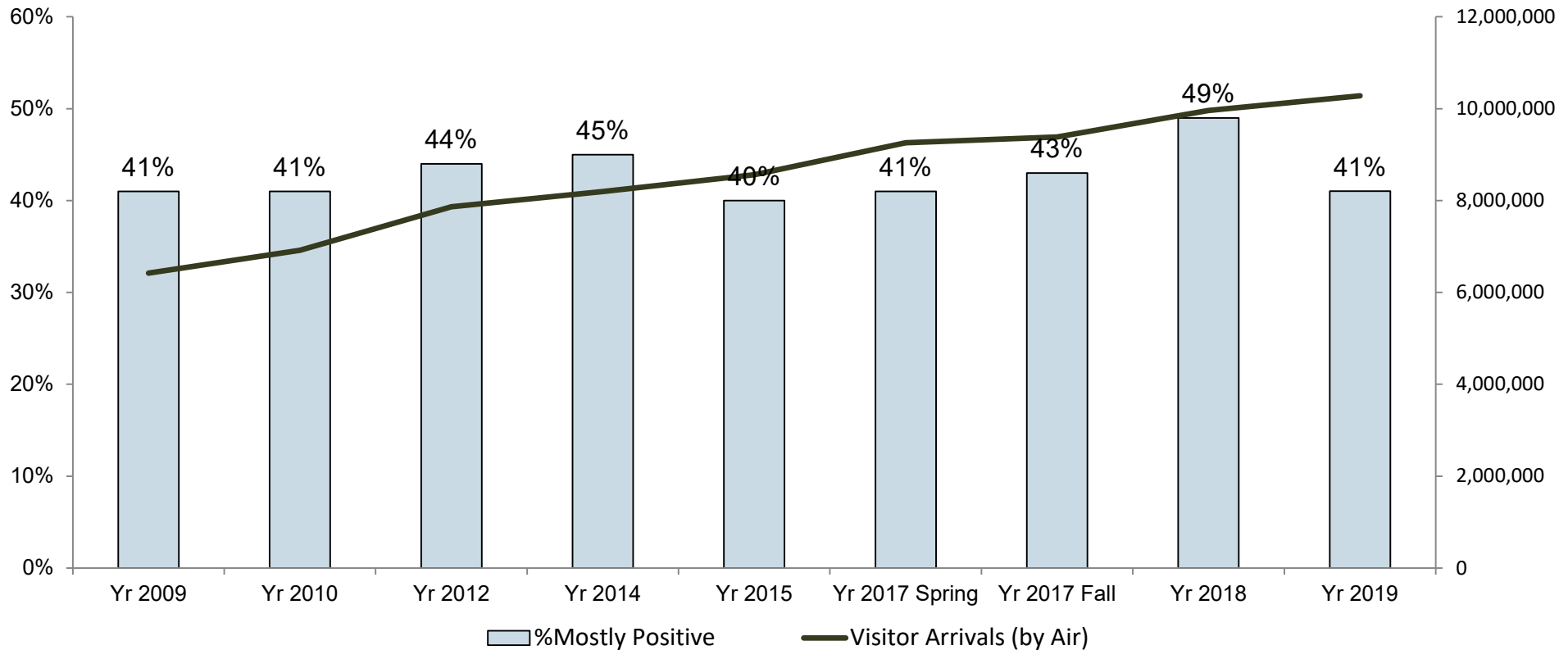


Q5a. In your opinion, what problems do you think tourism has created in Hawai'i?

Impact on You & Your Family

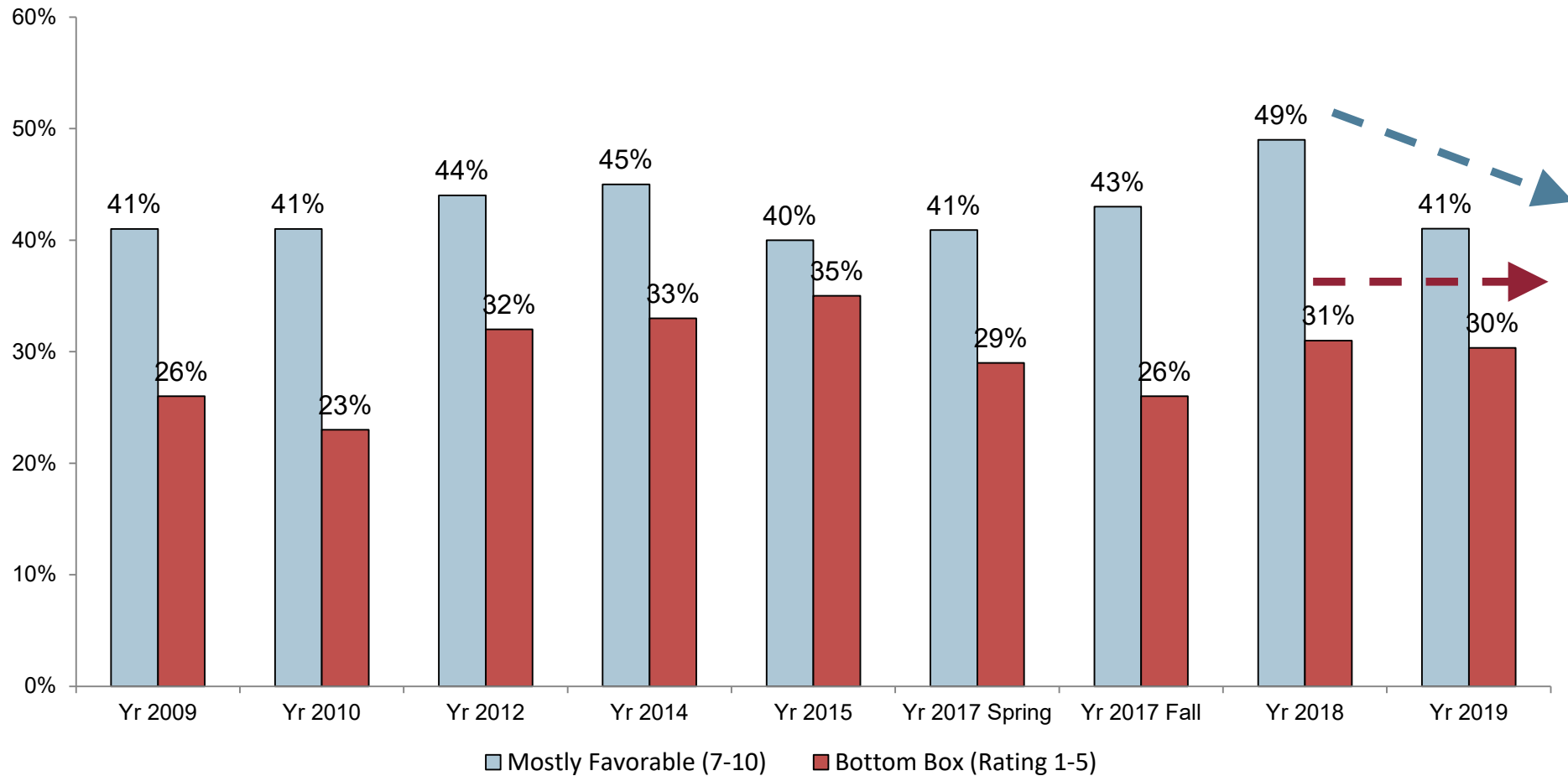
**% saying Tourism has been “mostly positive”
for you and your family**
(Rating of 7-to-10 on 10 Point Scale)

Annual Visitor Arrivals (by Air)



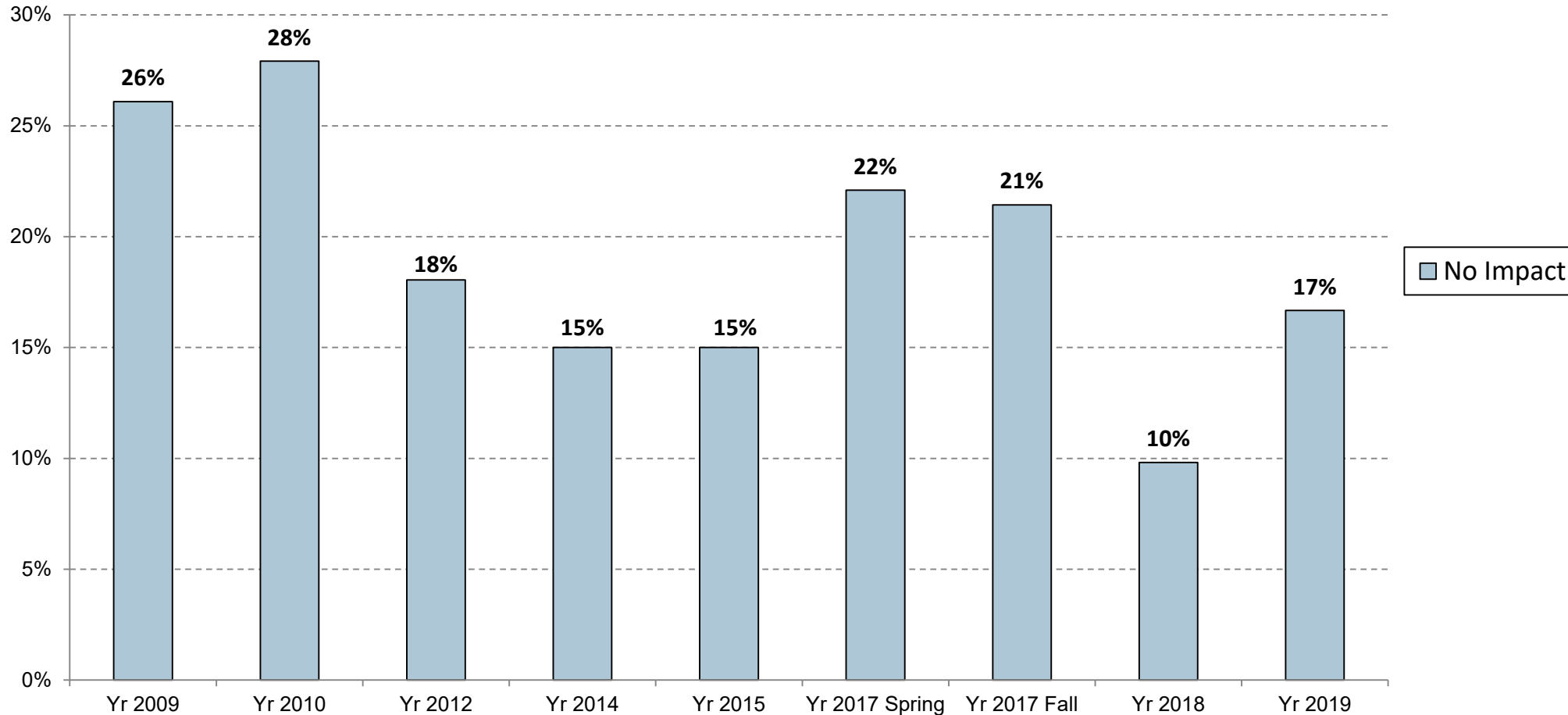
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family



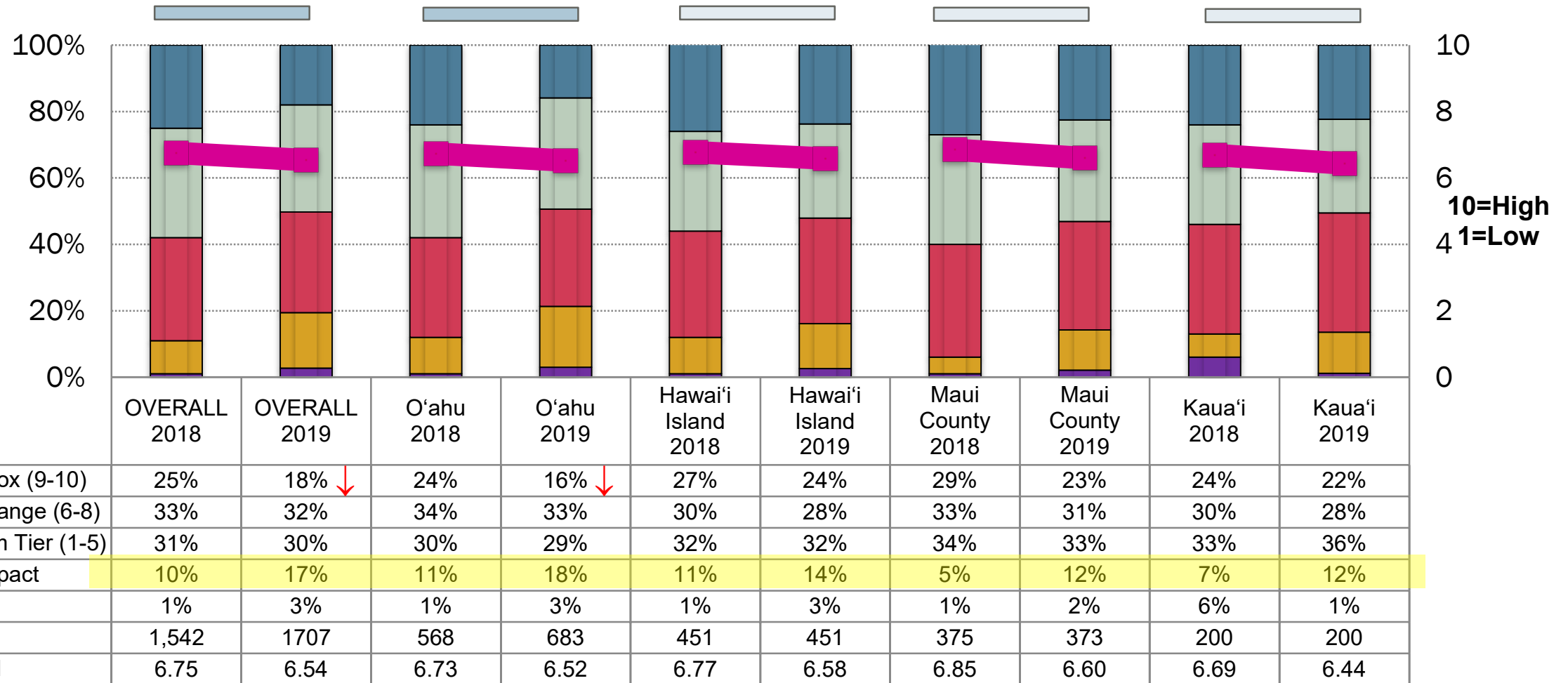
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – No Impact



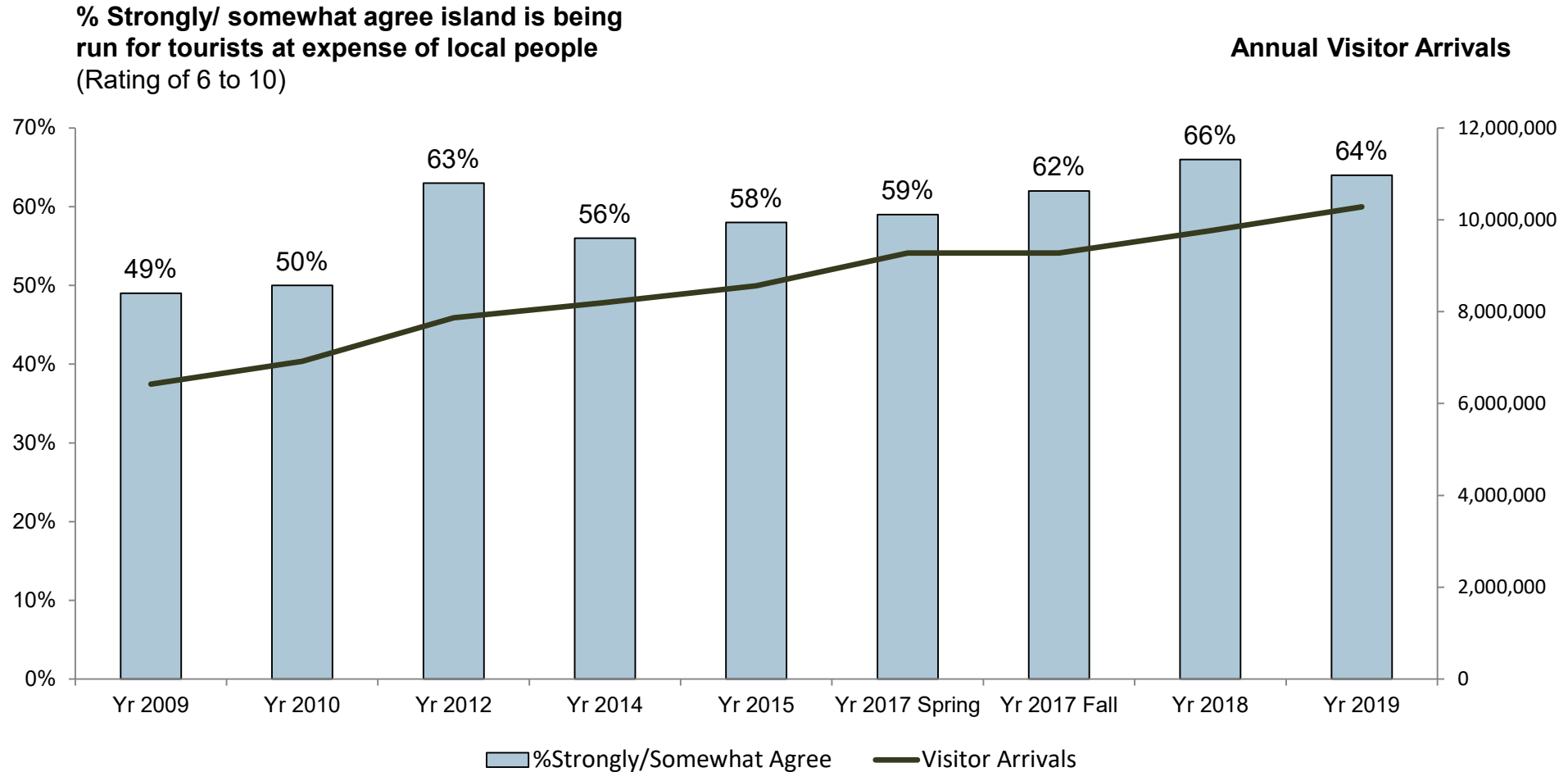
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



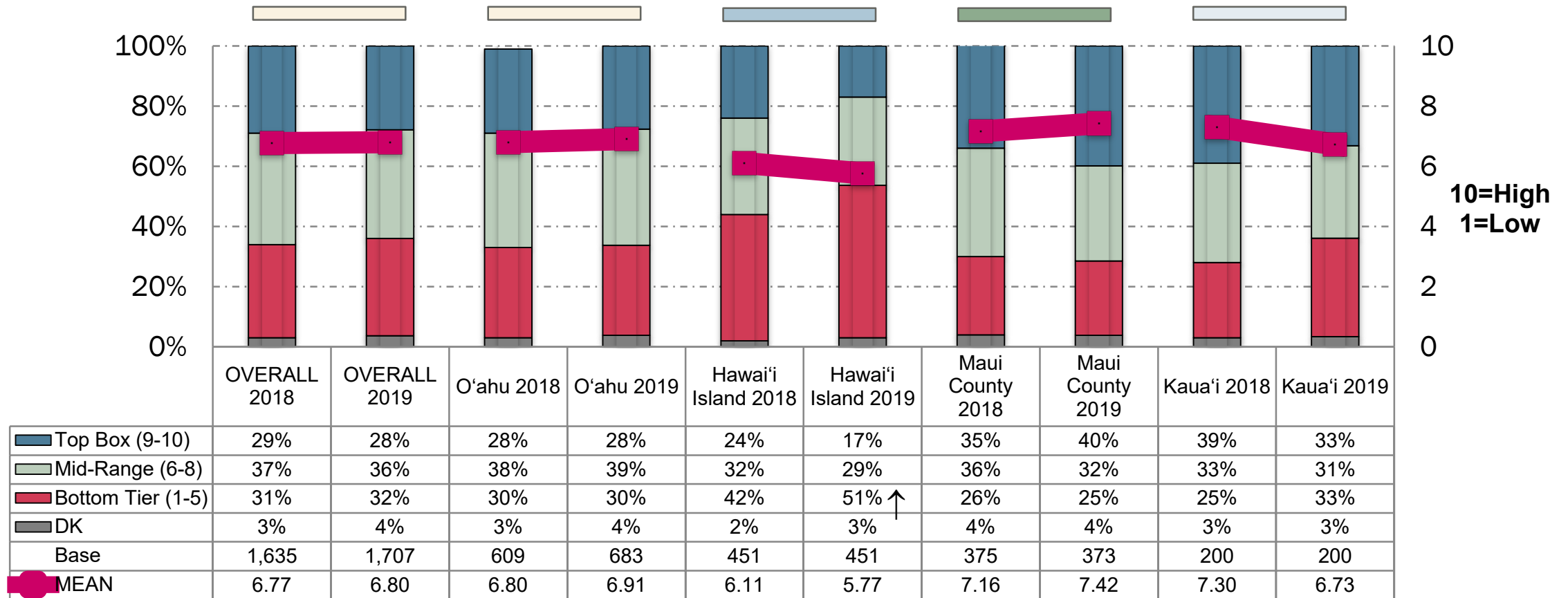
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

“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...?

Drivers of Resident Sentiment

Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Social Benefits (42%) 2018: 20% Fall '17: 40% Spring '17: 47%	Creates jobs that have opportunities for advancement	11%
	Creates shopping, restaurants and entertainment opportunities for residents	11%
	Creates many well-paying jobs for residents	10%
	Sponsors festivals, activities & sports events for residents & visitors	6%
	Provides opportunities for residents to be involved	4%
	Is an industry that enhances residents' quality of life	0%
Cultural & Community Benefits (42%) 2018: 55% Fall '17: 40% Spring '17: 29%	I feel like I have a voice in my island's tourism development decisions	14%
	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%
	Helps to preserves Native Hawaiian culture and language	6%
	Tourism is consistent with community values on this island	5%
	Tourism in Hawai'i reminds me that we have a unique culture to share with visitors	1%
	Helps sustain Hawai'i's natural resources, parks and cultural sites	0%
Negative Impacts (16%) 2018: 25% Fall '17: 20% Spring '17: 24%	Tourism results in a higher cost of living	5%
	Tourism in Hawai'i increases traffic problems	4%
	My island's economy is too dependent on tourism	4%
	This island is being run for tourists at the expense of local people	3%

Moving Forward: What's the Big Idea?

1

With Hawai'i's visitor industry heading toward its eighth consecutive year of record visitor arrivals to the state, resident sentiment has generally weakened, though the key indicators showed mixed results.

2

The visitor industry's impact on residents' overall quality of life becomes key to improving resident sentiment, as resident attitudes shift toward seeking an equal balance of Economic/Social and Cultural/Community benefits from the industry.

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

- Provide residents with a voice in tourism development
- Create jobs with opportunities for advancement
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Mahalo from the OmniTrak Group