

2010 Resident Sentiment Survey

Prepared for:



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OmniTrak Group Inc.

Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawaii 96813

Telephone: 1-808-528-4050; Fax: 1-808-538-6227

E-mail: omnitrak@omnitrakgroup.com

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Research Objectives

1. The Hawai'i Tourism Authority (HTA) developed the Hawai'i Tourism Strategic Plan 2005-2015 (TSP) to establish a vision for Hawai'i tourism. The TSP describes nine strategic initiatives, including Research and Planning, under which the Resident Sentiments on Tourism Survey (RSS) is conducted. Specifically, the RSS analyzes resident attitudes toward tourism and the tourism industry, both statewide and by county, including various actions or activities that are supported by the industry through the Transient Accommodations Tax (TAT) collections.
2. The RSS has been conducted eight times since 1999, and the current survey represents the eighth. The RSS has as its primary objectives:
 - 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 and to compare these ratings relative to other major industries.
 - To identify for the Visitor Industry and HTA, issues or concerns regarding tourism expressed by residents.

Sample (1 of 2)

- The 2010 Hawai'i study was a multi-staged sampling frame. First, a random sample of statewide households was drawn. Next, County and island samples were augmented to meet OmniTrak-established quotas to ensure sufficient numbers of Neighbor Island respondents for analysis purposes.
- Statewide sampling produced a total of n=1,650 respondents, a total of 600 O'ahu residents and 1,050 Neighbor Island residents.
- The resulting sample of residents was weighted proportionate to population distribution per the State Census 2009 update.
- 2010 represents the second survey conducted by OmniTrak, following the first conducted in 2009. This report compares primarily 2009 vs. 2010 results, with tracking since 1988 shown where the data is available.

Sample (2 of 2)

The survey sample was distributed as follows:

	SAMPLING QUOTA	SAMPLING ERROR
OAHU COUNTY	600	+/- 4%
HAWAI'I COUNTY	450	+/- 5%
MAUI COUNTY	400	+/- 5%
KAUAI COUNTY	200	+/- 7%
TOTAL	1,650	+/- 3%

Within the sample, Visitor Industry employees are defined as those who are currently employed in the Visitor Industry or anyone in the household who currently works in the Visitor Industry. Visitor Industry employees were segmented against non-industry residents for differences in attitudes.

Methodology

- The methodology used was a Computer Assisted Telephone Interview (CATI).
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in downtown Honolulu.
- Field Dates: September 20 to November 21, 2010.
- Statistical Analysis Sample Differences -- Within the reports' tables, a shaded or boxed area signifies a statistically significant difference across two or more respondent segments at the 95% level of confidence. An arrow ↑ or ↓ indicates a statistically significant change between 2009 and 2010.

CONCLUSIONS

Key Conclusions (1 of 2)

- 1. Public opinion towards tourism has improved since 2009. This is evident on two metrics: Overall favorability has increased 11% from 7.3 to 8.1. Further, those who agree that tourism is of net benefit has gained 4% from 7.5 to 7.8.**
 - The Visitor Industry continues to be recognized as an “economic engine” of the State having the strongest multiplier effect. As the economy slowly improves, positive sentiment appears to be increasing and negative sentiment seems to be stabilizing.
 - While the biggest increase in opinion of net benefit gains occurred on the Big Island and Kaua‘i, Neighbor Island outreach continues to be important because of generally softer ratings for the industry there versus O‘ahu.
- 2. The perception that tourism has a net benefit to the State is driven by economic benefits, particularly the multiplier effect and jobs, and opportunities it offers for enrichment and entertainment.**
 - This driver accounts for more than half of a 1-point increase in agreement that tourism is of net benefit to the State.

* Based on findings of a 2000 O‘ahu Visitor Survey conducted for the State DBEDT by OmniTrak Group.

Key Conclusions (2 of 2)

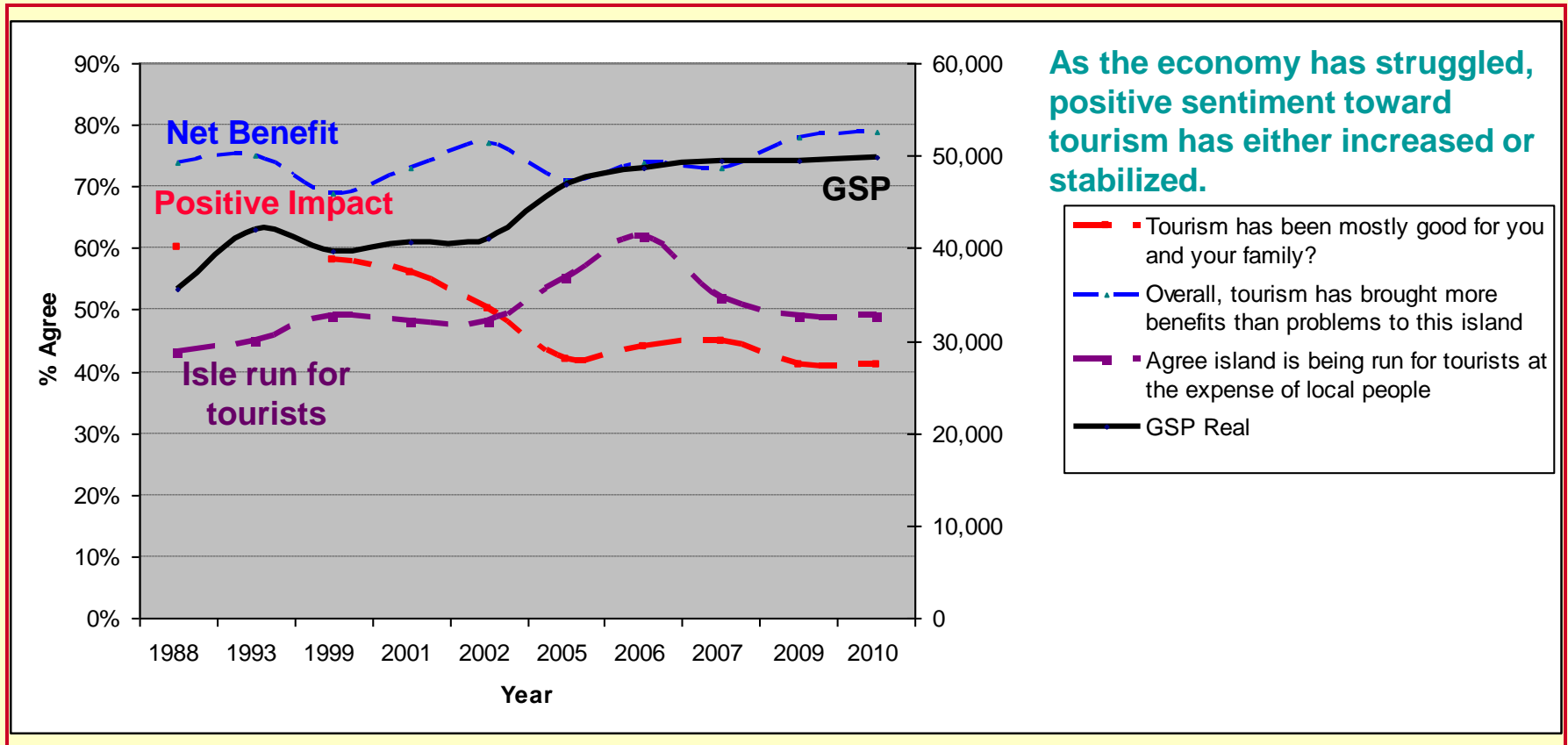
3. Compared with 2009, Hawai'i residents are incrementally more satisfied with the Visitor Industry's fulfillment of most attributes tied to The Strategic Plan (TSP).
 - Satisfaction is incrementally up in terms of the Visitor Industry's sponsorship of sport events.
 - Solid majorities argue that tourism contributes to a sustainable economy, respects our multi-cultural heritage, sponsors sport events, and makes Hawai'i safe. Opinion is split on sustaining natural resources, Hawai'i's culture preservation, and contributions to solving community problems.

* Based on findings of a 2000 O'ahu Visitor Survey conducted for the State DBEDT by OmniTrak Group.

Tracking Key Metrics vs. GSP: Impact of Economy on Tourism Attitudes

Tracking GSP vs. Key Survey Metrics: 1988-2010

OmniTrak ran a regression analysis of key perceptions in relation to the State's economic conditions as measured by Gross State Product (GSP). Attitudes toward the Visitor Industry correlate with the economy. In good times, residents are more critical; in bad times, they value tourism more.* This may be due to the industry's role as employer, as survey data suggests that jobs are the main economic concern of residents.



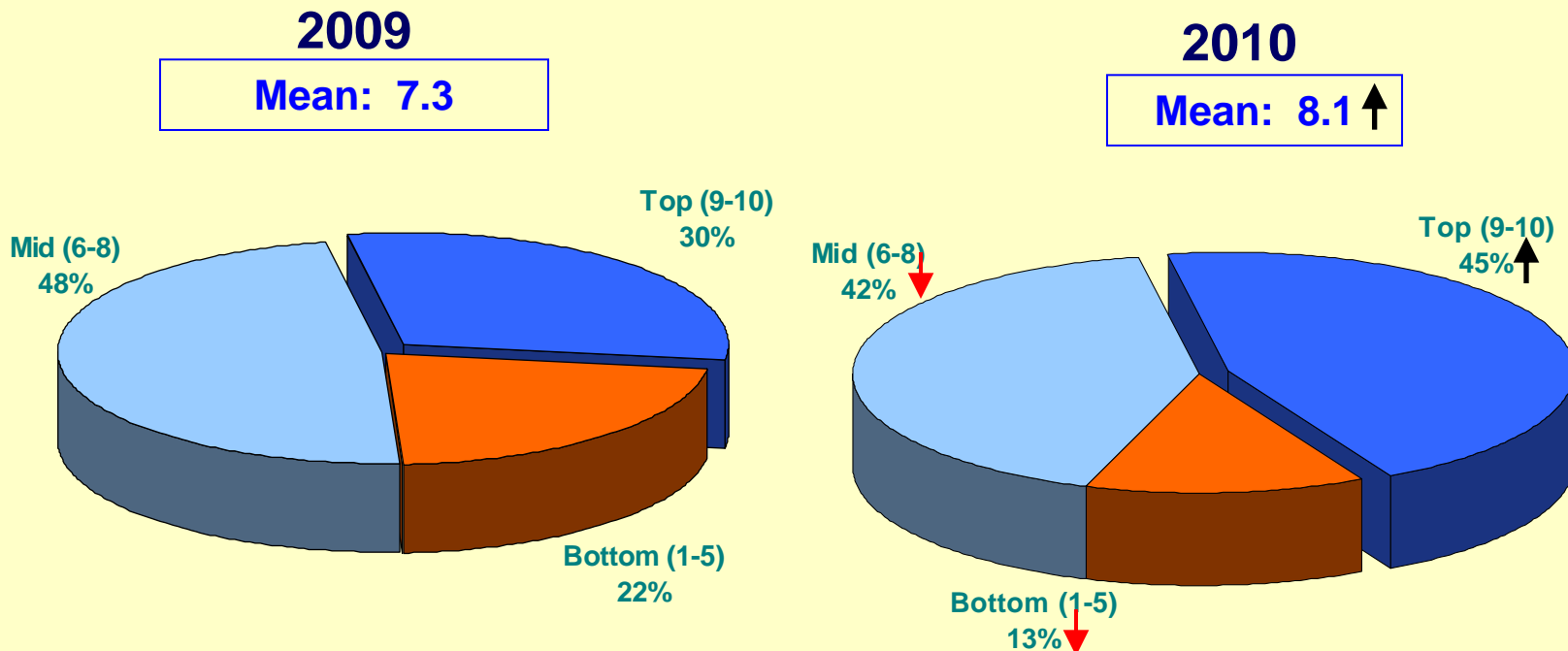
* Source for GSP: State of Hawai'i, 2009 Data Book, 1988 - 2009

Tracking Overall Favorability Toward Tourism

Tracking Tourism Favorability: 2009 to 2010

A significant boost in favorable sentiment toward Tourism occurred from 2009 to 2010. Top Box (9-10) ratings of favorability – a measure of support for the industry - rose 15 points from 30% to 45% while Bottom Box ratings (1-5) (a measure of negative sentiment) dropped significantly from 22% to 13%. This suggests that positive public sentiment is growing in tandem with a slow improvement in statewide economic conditions.

“Using a 10-point scale where 10=extremely favorable and 1=not favorable at all, please give me your opinion of Tourism as an industry in Hawai‘i”



Base: 1,650 statewide residents each in 2009 and 2010.

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?

Tracking Tourism Favorability: By Island

The upturn in positive sentiment toward Tourism occurred across the State, with Maui and Kaua'i registering the biggest increases in Top Box ratings at +19 and +16 points, respectively. Top Box sentiment on O'ahu and the Big Island rose significantly as well (by +15 and +10 points, respectively). Many residents have "traded up" from the Mid (6-8) and Bottom Boxes (1-5) to the Top Box (9-10) of favorability.

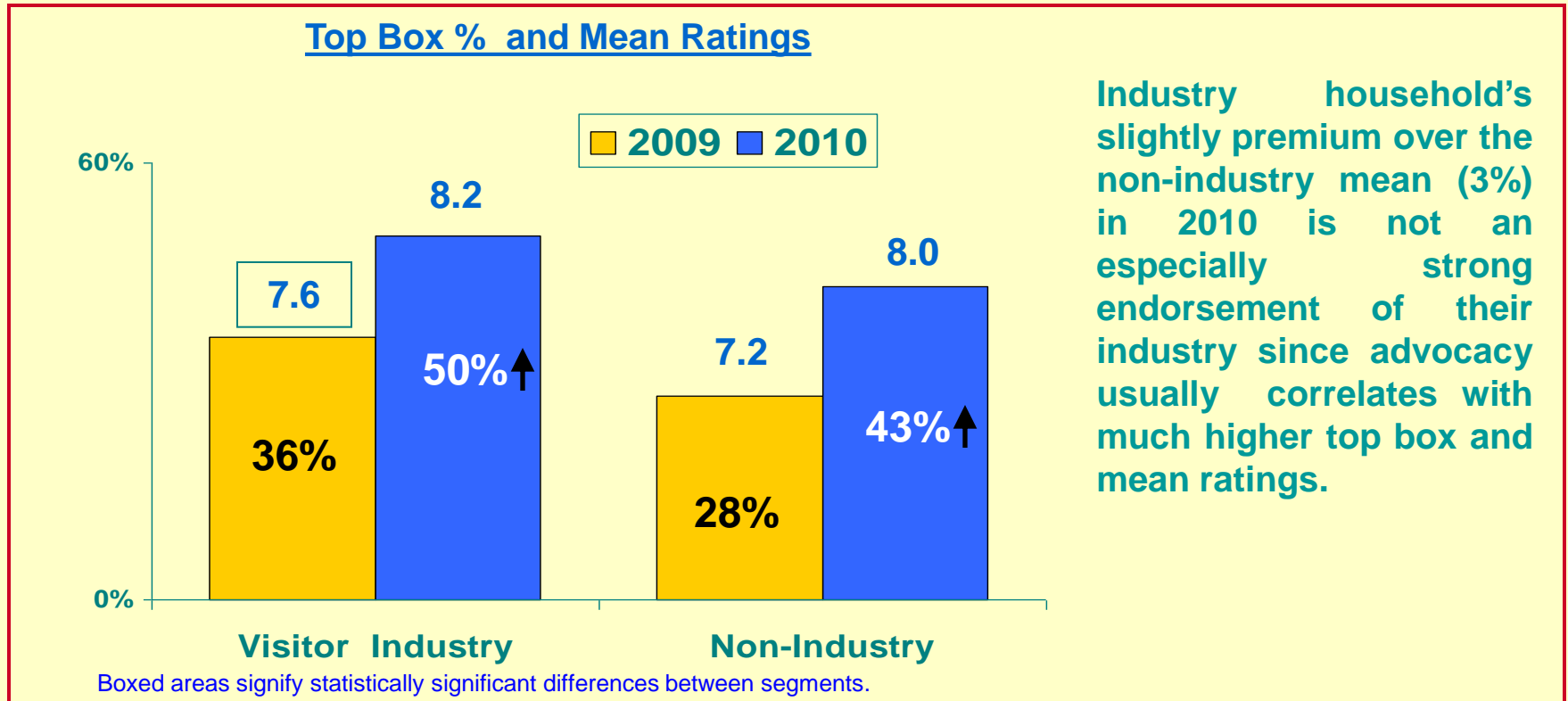
Shaded areas signify statistically significant differences between segments, while arrows indicate significant changes since 2009.

<i>"Please give me your opinion of tourism."</i>	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2009	2010	2009	2010	2009	2010	2009	2010
Top Box (9-10)	30%	45% ↑	32%	42% ↑	30%	49% ↑	32%	48% ↑
Mid-Box (6-8)	49%	42%	44%	45%	49%	34% ↓	37%	36%
Bottom Box (1-5)	21%	13% ↓	24%	13% ↓	21%	16%	31%	16% ↓
MEAN	7.3	8.1 ↑	7.3	7.9 ↑	7.3	8.1 ↑	6.9	8.2 ↑
BASE	592	596	441	435	394	397	198	197

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?

Tracking Tourism Favorability: Visitor Industry vs. Non-Industry

Over 1 in 4 (28%) statewide households have members employed in the Visitor Industry. Both groups are more favorable toward tourism in 2010 than in 2009, with no statistical differences in favorability between them currently in 2010 as was seen in 2009.



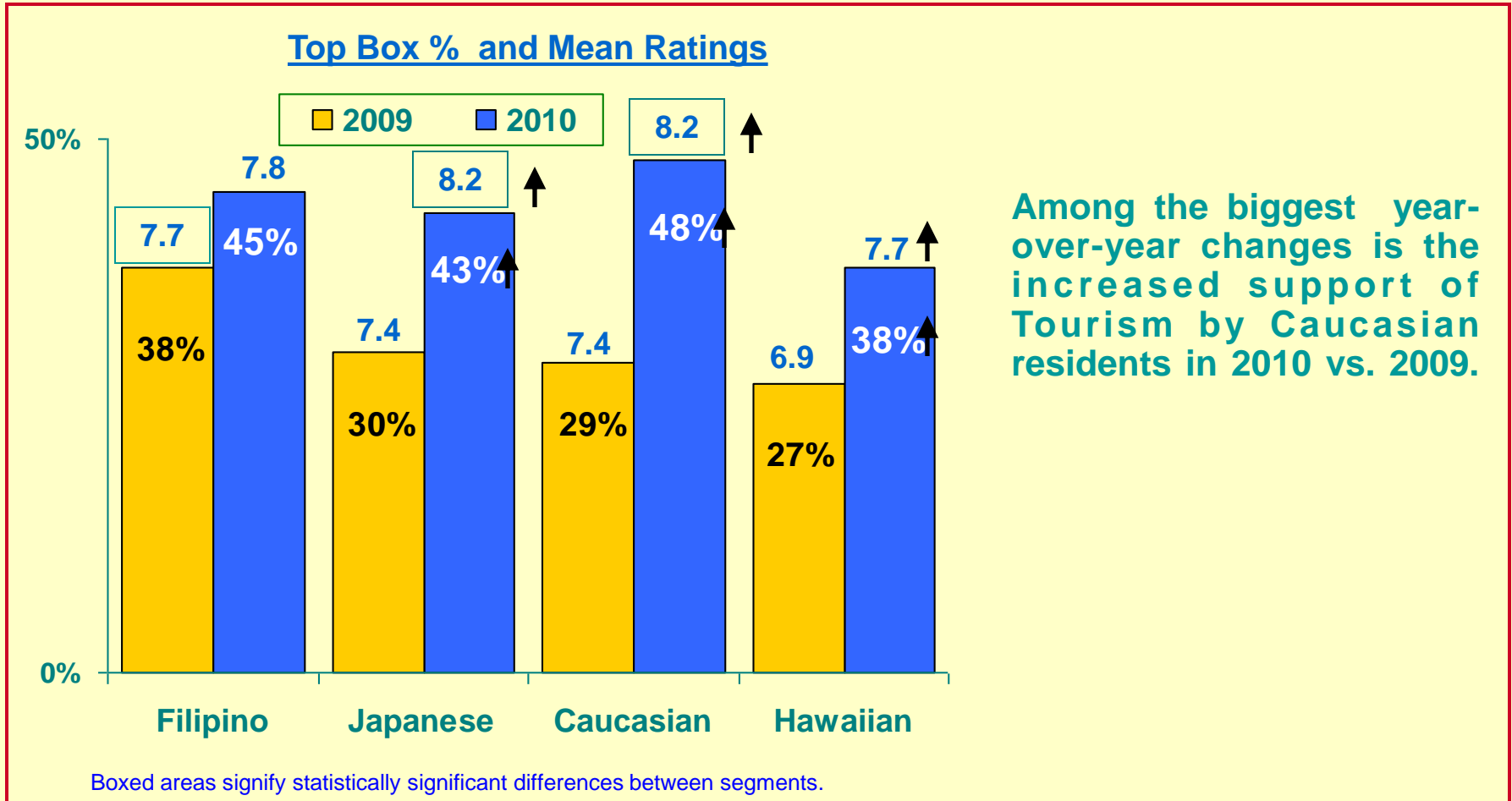
Base: Residents with a household member employed by the visitor industry: 446 (2009), 428 (2010); Households where no one is employed in tourism: 1204 (2009), 1222 (2010)

Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

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.

Tracking Tourism Favorability: Ethnic Segments

Culturally, the group most supportive of Tourism in 2010 are Caucasian residents, a near-reversal of 2009 when Filipino residents were most supportive and Caucasians among the least supportive of Tourism.



Among the biggest year-over-year changes is the increased support of Tourism by Caucasian residents in 2010 vs. 2009.

Base: In 2009 and 2010: 596 & 597 Caucasians; 239 & 266 Japanese; 354 & 323 Hawaiian; and 150 & 173 Filipinos, respectively.

Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

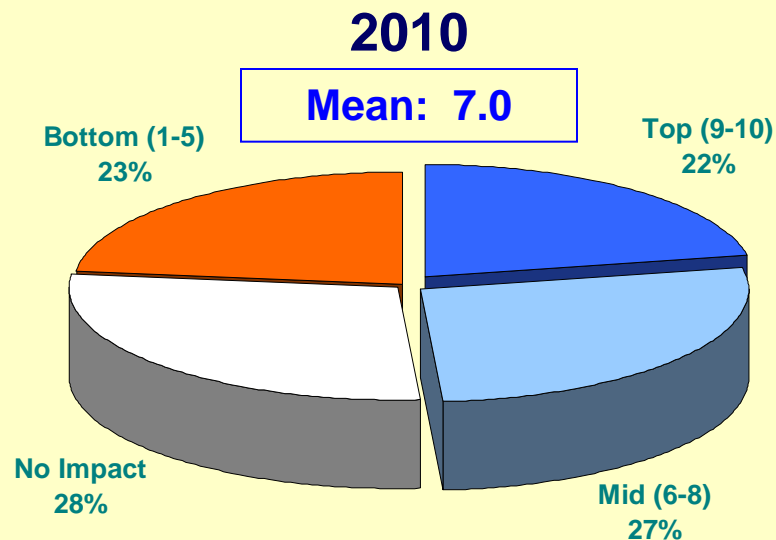
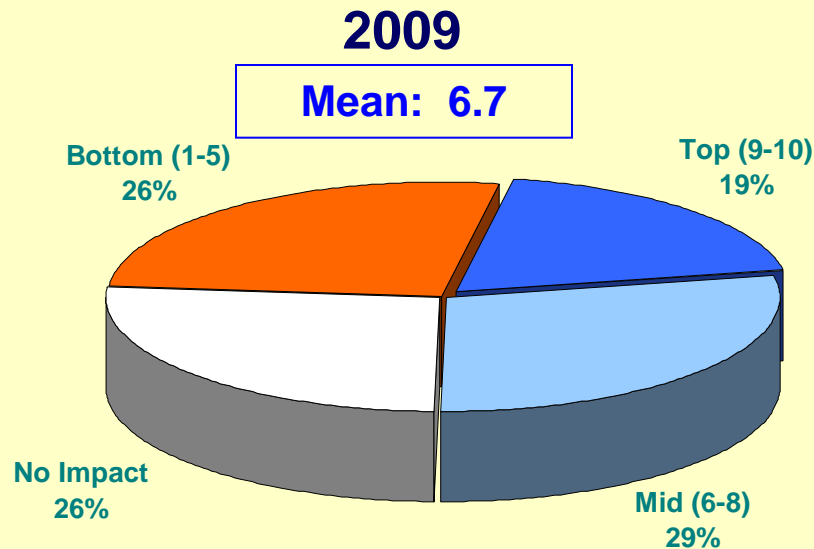
Q1. Using a 10-point scale where 10 means extremely favorable and 1 means not favorable at all, please give me your opinion of tourism as an industry in Hawai'i.

Tracking Overall Impact Of Tourism On Residents

Tracking Overall Impact of Tourism: 2009 to 2010

No significant change was seen on this question. In both 2009 and 2010, about half of residents indicated that Tourism has a positive impact on them, and half indicated either a negative impact or “no impact.”

“Again using a 10-point scale where 10=extremely positive and 1=extremely negative, how would you rate the overall impact tourism has on you and your family?”

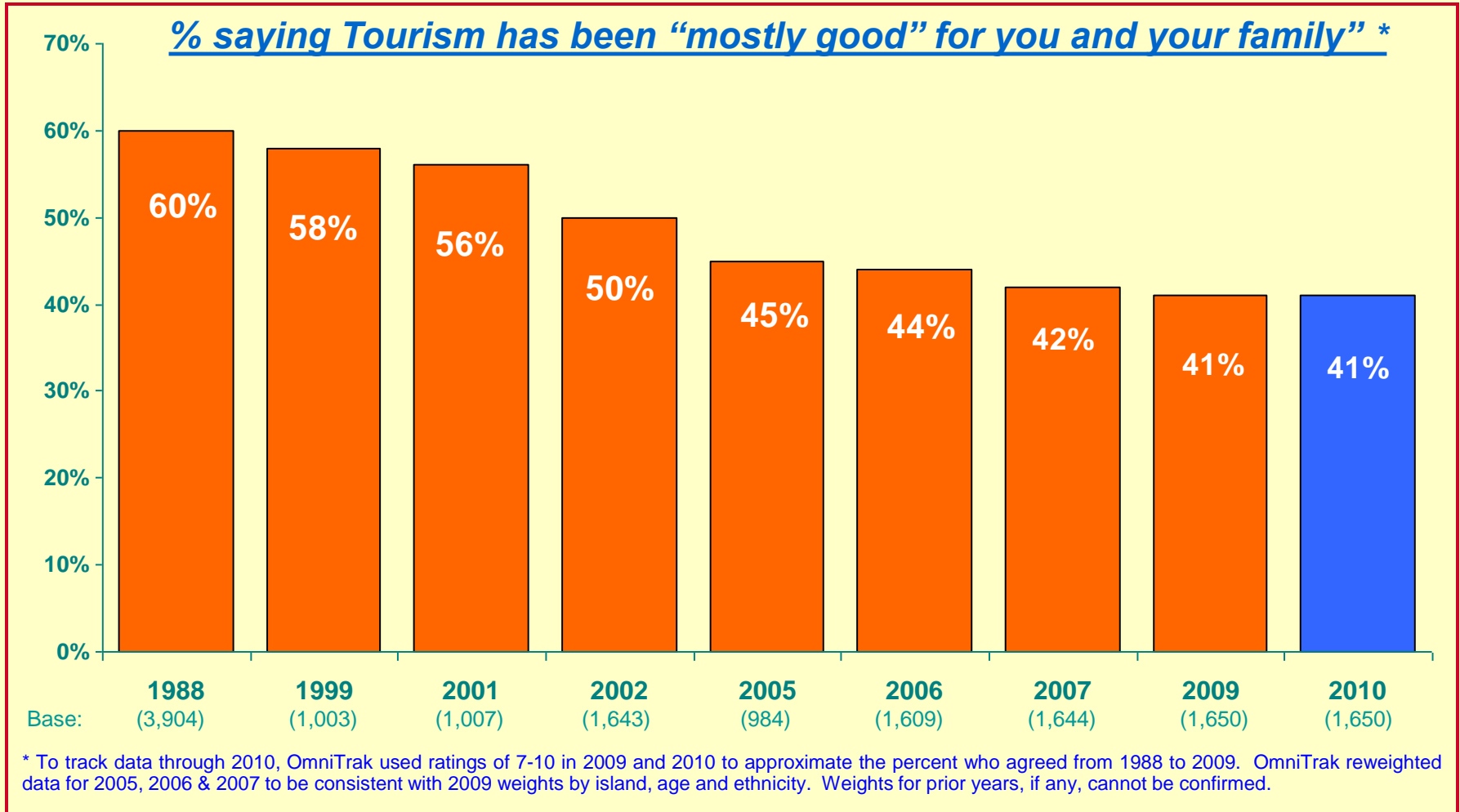


	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2009	2010	2009	2010	2009	2010	2009	2010
Top Box (9-10)	17%	20%	18%	24%	33%	31%	26%	20%
Mid Box (6-8)	27%	28%	31%	24%↓	32%	24%	23%	29%
Bottom Box (1-5)	26%	23%	23%	26%	24%	23%	32%	24%
No Impact	29%	30%	27%	26%	11%	22%↑	17%	27%
BASE	598	596	448	444	399	397	198	198

Q2a. Again 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?

Tracking Overall Impact of Tourism: 1988 to 2010

There is a clear trend over the past 10 years for *fewer* residents to agree that tourism “has been mostly good” for their families. Trend has been down but stable over recent years.

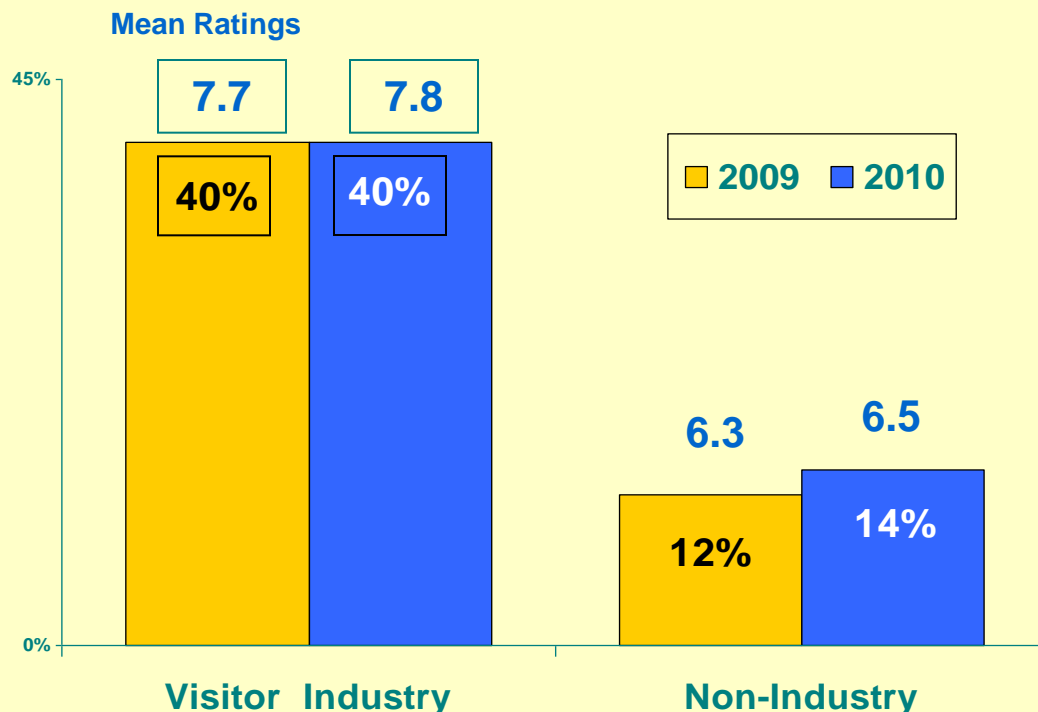


Q2a. Again using a 10-point scale where 10 means extremely positive and 1 means extremely negative, how would you rate the overall impact tourism has on you and your family?

Tracking Overall Impact of Tourism: Visitor Industry vs. Non-Industry

No significant change was seen on this metric, which is largely a gauge of industry employment where most of the positive sentiment comes from those employed or dependent on the Visitor Industry.

Top Box % and Mean Ratings



Strong positive sentiment in 2010 is nearly 3 times higher in industry households than in non-industry households, consistent with 2009 data.

Non-industry residents, in fact, lean negative, with an average rating of 6.5 out of 10 and 35% saying that tourism has “no impact” on them personally.

Boxed areas signify statistically significant differences between segments.

Base: Residents with household member employed in tourism: 446 (2009), 423 (2010); Households with no one employed in tourism: 1,204 (2009), 1,202 (2010)

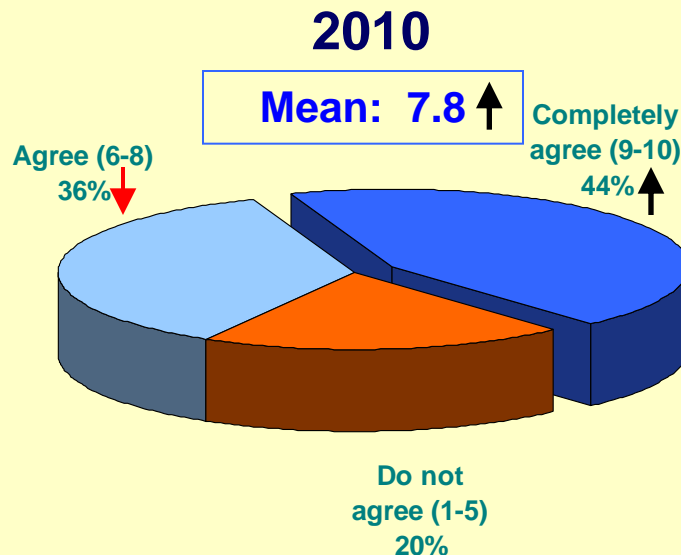
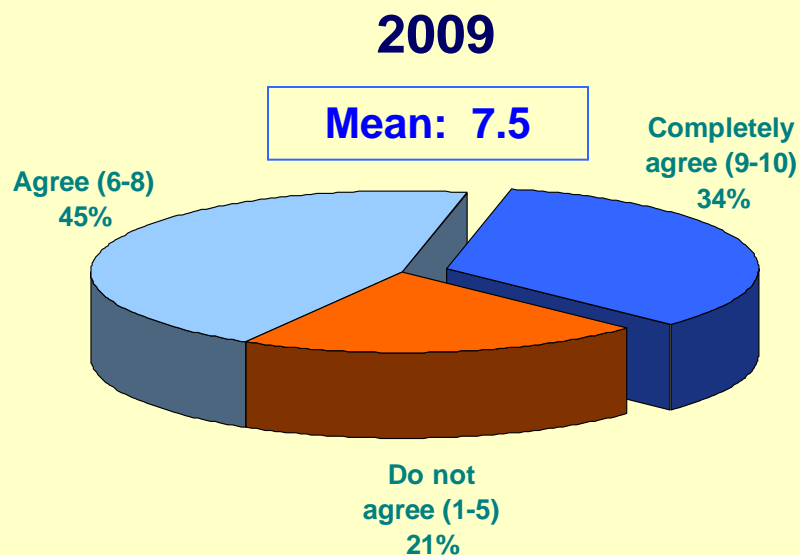
Q2a. Again using a 10-point scale where 10 means extremely positive and 1 means extremely negative, how would you rate the overall impact tourism has on you and your family?

Tracking Net Benefit Of Tourism

Tracking Net Benefit of Tourism: 2009 to 2010

The public is “trading up” from moderate to strongly positive on Tourism. The current survey tracked a rise in those who “completely agree” that the industry brings more benefits than problems, from 34% in 2009 to 44% in 2010.

“Do you agree or disagree that tourism has brought more benefits than problems to the State?”

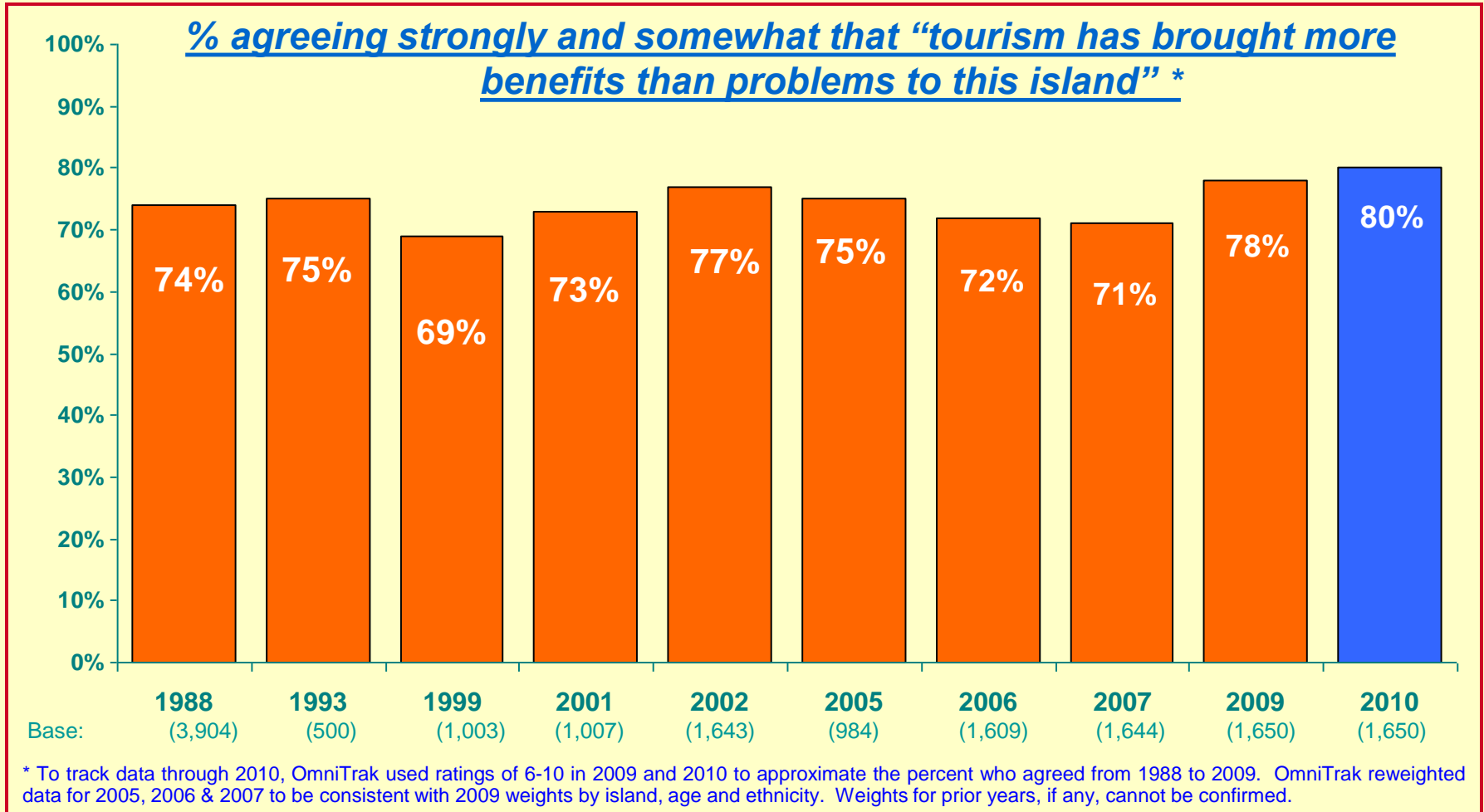


	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2009	2010 ↑	2009	2010 ↑	2009	2010 ↓	2009	2010 ↑
Completely agree (9-10)	35%	45% ↑	33%	44% ↑	31%	41%	29%	42% ↑
Agree (6-8)	44%	37%	47%	34% ↓	49%	30% ↓	47%	40%
Do not agree (1-5)	21%	18%	19%	23%	20%	28%	24%	17%
Mean	7.5	7.9 ↑	7.6	7.7	7.5	7.3	7.3	7.8
Base	593	590	445	442	395	398	199	197

Q3. “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 overall, tourism has brought more benefits than problems to the State of Hawai'i?”

Tracking Net Benefit of Tourism: 1988 to 2010

Over the long-term, about three-quarters of residents have consistently agreed that tourism delivers a “net benefit” to the State, with a upswing in sentiment in recent years (2009 and 2010)*.

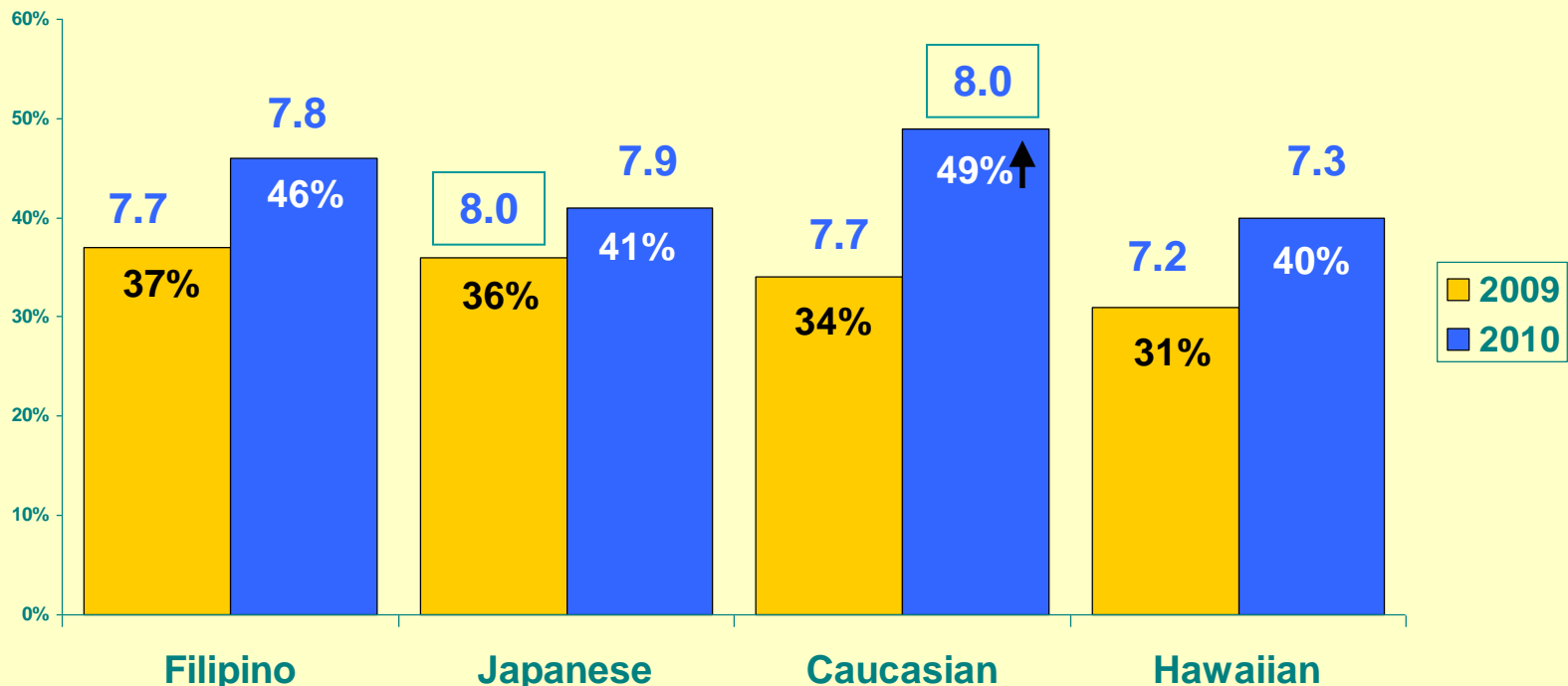


Q3: Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree that overall, tourism has brought more benefits than problems to this island? *In 2009, responses to the question changed from a choice of four responses to a 10-point scale where 10=completely agree and 1=do not agree at all.

Tracking Net Benefit Of Tourism: Ethnic Segments

A significant gain in Top Box ratings of Tourism's Net Benefit is seen only among Caucasian residents. In 2009, Caucasian residents were among the least supportive of tourism but in 2010 they are now among the most supportive.

Top Box % and Mean Ratings



Boxed areas signify statistically significant differences between segments.

Base: In 2009 and 2010: 148 & 174 Filipino; 239 & 266 Japanese; 601 & 605 Caucasian; 358 & 320 Hawaiian, respectively.

In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5

Q3. Using a 10-point scale where 10 means completely agree and 1 means not agree at all, how much do you agree or disagree that overall, tourism has brought more benefits than problems to the State of Hawai'i?

Tracking Statements About Tourism: Benefits vs. Problems

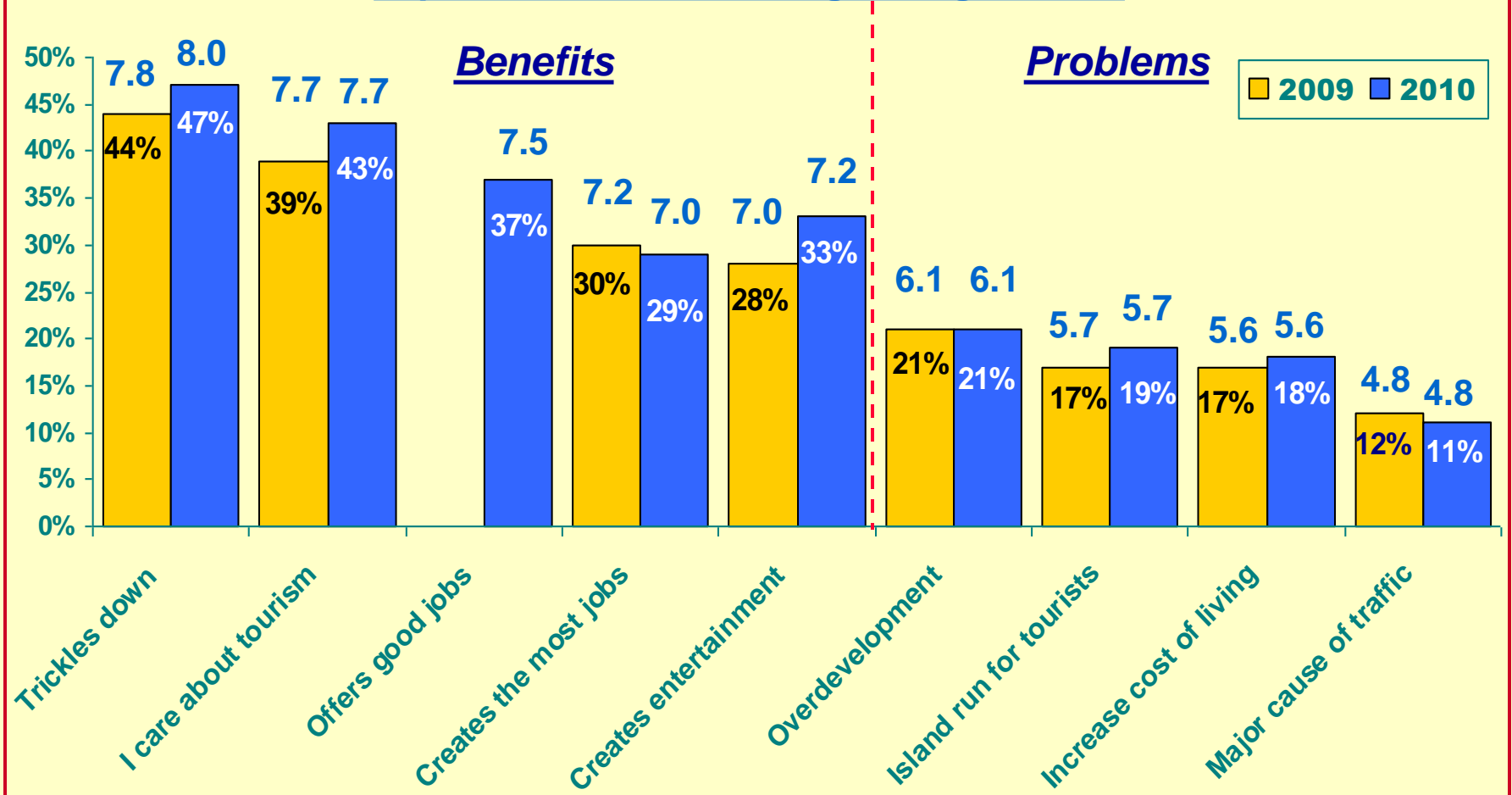
Nine Statements About Tourism

- “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 spending trickles down to local businesses*
 - *Tourism is an industry whose success I care about*
 - *Tourism generates the most jobs for residents*
 - *Tourism creates entertainment and enrichment opportunities*
 - *This island is being run for tourists at the expense of local people*
 - *Tourism is mainly responsible for over-development*
 - *Tourism is most responsible for Hawai‘i’s high cost of living*
 - *Tourism is the major cause of traffic*
 - **ADDED IN 2010:** *Tourism offers good jobs for Hawai‘i residents*

Nine Statements About Tourism: 2009 to 2010

No statistically significant changes were seen here. Residents by and large agree that tourism provides economic and other benefits to the State and are divided over negative impacts like over development, higher cost of living, and traffic.

Top Box % & Mean Ratings of Agreement



Base: 1,650 statewide residents each in 2009 and 2010.

*In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Q4. "Using a 10-point scale where 10 means completely agree and 1 means do not agree at all, how much do you agree that ___?"

Tracking Statements About Tourism: 'Top Box' % By Island

There is more concern on the Neighbor Islands with tourism impacts. More Maui residents than those in other counties agree strongly that tourism causes *over development, higher living costs and traffic*, with a significant increase since 2009 that *tourism is responsible for higher living costs*. On the other hand, significant more Big Island residents care about tourism industry in 2010 than in 2009.

<i>Top Box %: Agreeing that tourism...</i>	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2009	2010	2009	2010	2009	2010	2009	2010
<i>...spending trickles down to businesses</i>	42%	48%	50%	45%	46%	45%	39%	45%
<i>...is an industry I care about</i>	39%	43%	36%	45%↑	41%	40%	36%	41%
<i>...generates the most jobs for residents</i>	28%	25%	32%	32%	38%	44%	36%	40%
<i>...creates entertainment opportunities</i>	29%	34%	28%	27%	25%	32%	24%	28%
<i>... offers good jobs for residents (NEW)</i>	-	35%	-	38%	-	46%	-	45%
<i>...is responsible for over development</i>	18%	17%	26%	23%	31%	39%	26%	31%
<i>...this island is being run for tourists</i>	16%	18%	18%	12%	27%	29%	13%	21%
<i>...is responsible for higher living costs</i>	16%	16%	19%	16%	22%	32%↑	17%	19%
<i>... is a major cause of traffic</i>	7%	7%	14%	16%	28%	26%	24%	17%
BASE	600	599	450	450	400	400	200	200

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..."

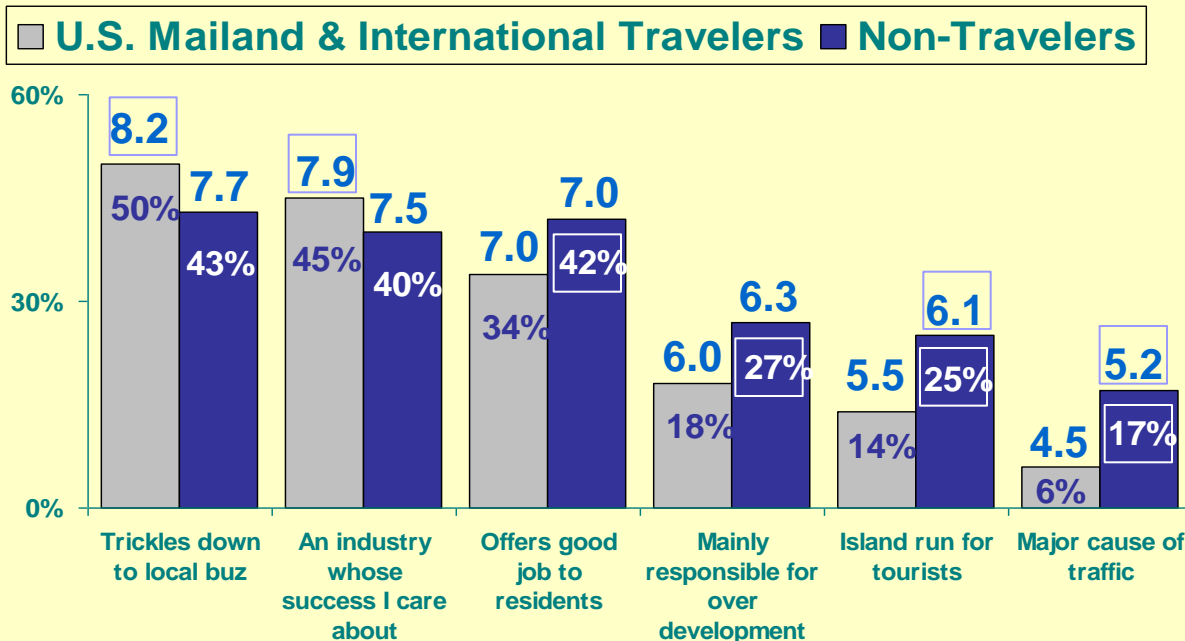
Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Tracking Statements About Tourism: Travelers vs. Non-Travelers

In 2010, the only perceptual differences between those who traveled off-island (interisland, to the US mainland or internationally) and those who did not travel at all were found in perceptions of tourism-related traffic, the notion that “*this island is being run for tourists*” and “*tourism spending trickles down to local business.*”

KATHY: Note: Number change to us mainland and international travels RV

Top Box % and Mean Ratings



The data suggests that off-island travel leads to a less negative view of tourism on these measures: travelers are less likely to feel that their *island is being run for the tourists* or that *tourism is a major cause of traffic*. And they are more likely to agree that *visitor spending benefits local business*.

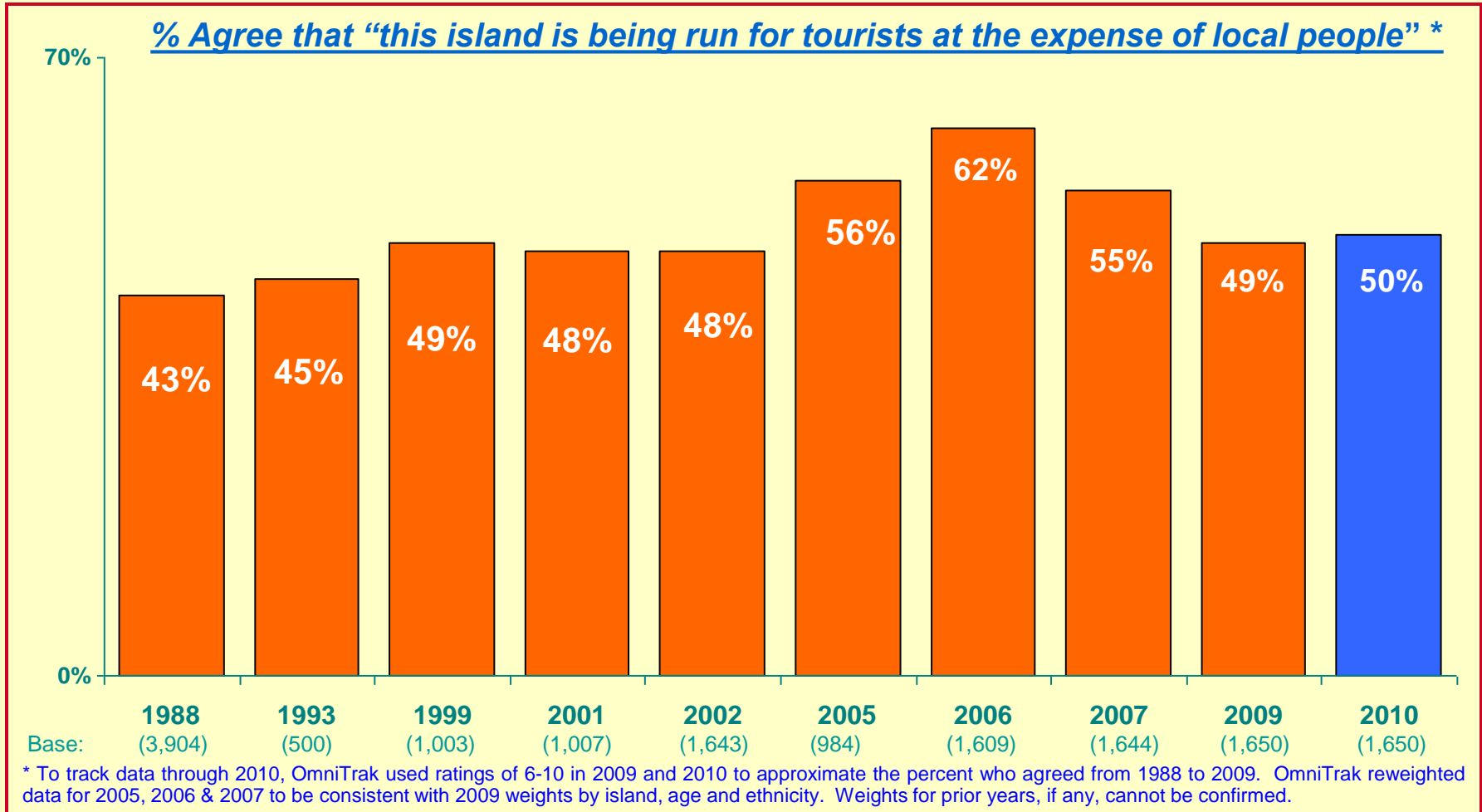
Boxed areas signify statistically significant differences between segments.

Bases: 953 residents who traveled to the US mainland or to international destinations, and 697 who did not travel at all.

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...”

Tracking “Island Being Run For Tourists”: 1988 to 2010

Since 2006 there has been a significant lessening of resentment toward a perceived preference for tourists over local people, consistent with the decline in tourism since 2007.

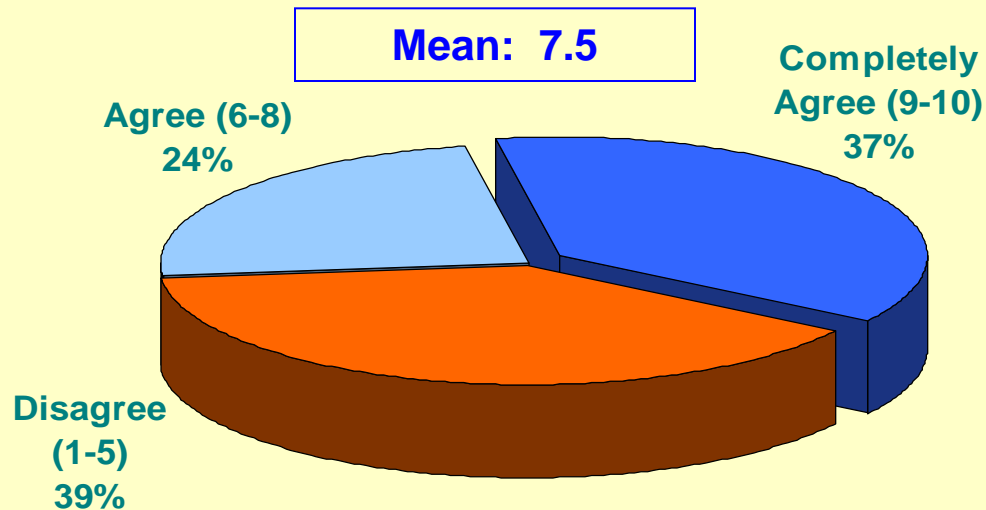


Q4.5. “Using a 10-point scale where 10 means completely agree and 1 means do not agree at all, how much do you agree or disagree that this island is being run for tourists at the expense of local people?” In 2009, responses to the question changed from a choice of four responses to a 10-point scale where 10=Completely agree and 1=Do not agree at all.

Good Jobs in Tourism (New Question in 2010)

Responses to a new question in 2010 give more evidence that residents value the industry's economic contribution. Over 3 in 5 residents agree that "tourism offers good jobs for residents" and over 1 in 3 completely agrees with this statement. Significantly more Maui residents strongly agree this.

"How much do you agree or disagree that Tourism offers good jobs for Hawai'i residents?"



	O'AHU	HAWAI'I	MAUI	KAUA'I
Top Box (9-10)	35%	38%	46%	45%
Mid Box (6-8)	41%	41%	30%	36%
Bottom Box (1-5)	24%	21%	24%	20%
Mean	7.4	7.5	7.6	7.8

Base: 1,650 statewide residents in 2010.

Q4.9 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 offers good jobs for Hawai'i residents?

Tracking Satisfaction With Visitor Industry Involvement

Visitor Industry Involvement Areas

“Using a 10-point scale where 10 means Extremely Satisfied and 1 means Not Satisfied at all, how satisfied are you overall that the Visitor Industry....[INSERT]?”

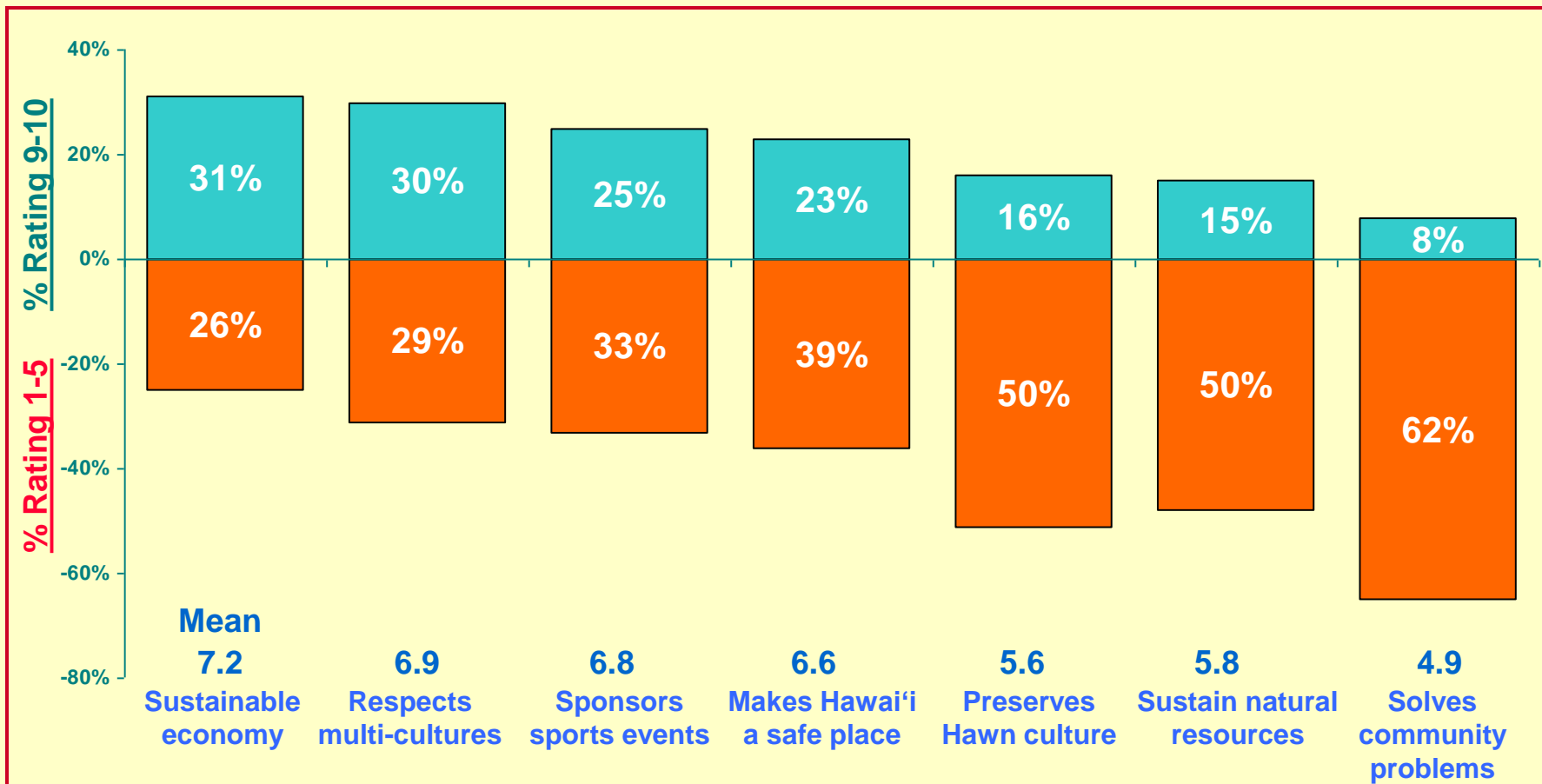
- Helps to preserve Native Hawaiian language and culture
- Helps to sustain Hawai‘i’s natural resources
- Respects Hawai‘i’s multi-cultural heritage
- Sponsors sports events and festivals for residents and visitors
- Contributes to a sustainable economy in Hawai‘i
- Works to make Hawai‘i a safe place for residents and visitors
- Takes a leadership role in solving community problems

[IF RATED ANY ITEM 1-3 ON THE 10-POINT SCALE, ASK:]

“Why did you rate the Visitor Industry _____ out of 10 for _____? Any other reason?”

2010 Satisfaction With Industry Involvement: Statewide

Residents are more satisfied in Visitor Industry's role in *sustaining the local economy* and *respecting Hawai'i's multi-cultural heritage*. Dissatisfaction remains widespread with the industry's *leadership role in solving community problems*, in helping to *sustain natural resources*, and in *preserving Native Hawaiian Culture*.



Base: 1,650 statewide residents in 2010.

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

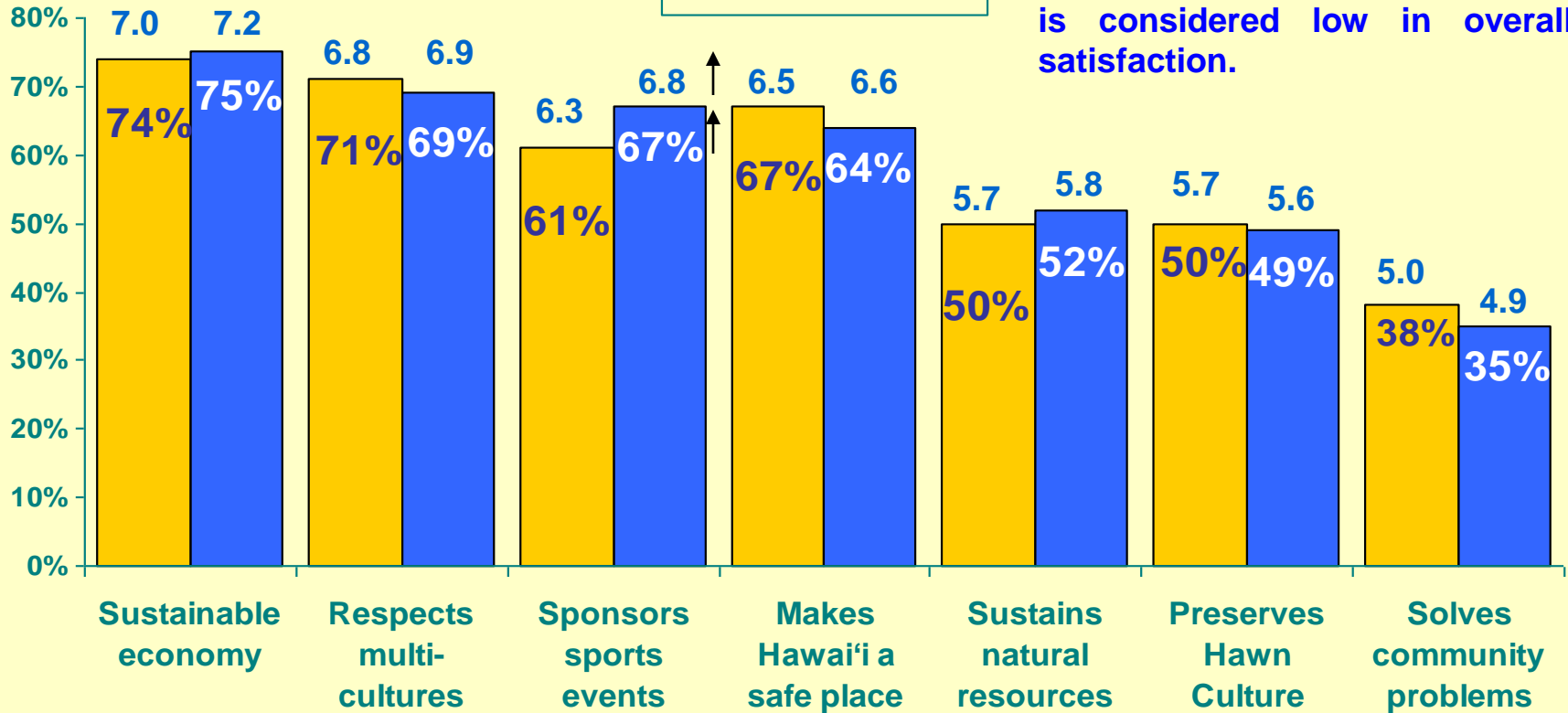
Tracking Satisfaction With Industry Involvement – TSP Measurement: 2009 to 2010

Statewide satisfaction remains highest on the industry’s role in the economy, and significant improvement was seen in 2010 relative to *sponsoring sports events*.

Satisfaction Mean Ratings (6-10%)

2009 2010

A mean rating of 6.0 and below is considered low in overall satisfaction.



Base: 1,650 statewide residents each in 2009 and 2010.

* In OmniTrak’s analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Q6. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?”

2010 Satisfaction With Industry Involvement: By Island

In 2010, residents in different counties have different views on Visitor Industry's involvement. Kaua'i residents are more satisfied with industry's *contribution to sustainable economy* while O'ahu residents rank highest for industry's effort to respect *multi-cultural heritage* and Big Island residents are more satisfied in industry's help to *preserve Hawaiian language and culture*.

<i>Ratings 6-10 %: Satisfaction with Industry</i>	O'AHU	HAWAI'I	MAUI	KAUA'I
Contributes to sustainable economy	75%	75%	69%	82%
Respects Hawai'i's multi-cultural heritage	71%	68%	56%	68%
Sponsors sports events for residents/visitors	69%	63%	58%	69%
Works to make Hawai'i a safe place for residents and visitors	64%	63%	62%	67%
Helps to sustain Hawai'i's natural resources	53%	52%	42%	57%
Helps to preserve Hawn. language & culture	48%	53%	48%	45%
Leadership role in solving community problems	32%	38%	40%	42%
BASE	599	447	400	200

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Tracking Satisfaction With Visitor Involvement: By Island

Satisfaction increased significantly on O‘ahu relative to the Visitor Industry *respecting our multi-cultural heritage*, on Maui relative to *making Hawai‘i a safe place*, and on the Big Island for *helping to preserve Hawaiian language and culture*. Residents are more satisfied in Visitor Industry’s *sponsorship in sport events*, residents on all islands except for the Big Island show significant increase in satisfaction.

Ratings 6-10 %: Satisfaction with Industry	O‘AHU		HAWAI‘I		MAUI		KAUA‘I	
	2009	2010	2009	2010	2009	2010	2009	2010
Contributes to sustainable economy	77%	75%	67%	75%↑	67%	69%	79%	82%
Respects Hawai‘i’s multi-cultural heritage	74%	71%	67%	68%	63%	56%	66%	68%
Sponsors sports events for residents/visitors	64%	69%	50%	63%↑	54%	58%	50%	69%↑
Works to make Hawai‘i a safe place for residents and visitors	68%	64%	62%	63%	59%	62%	71%	67%
Helps to preserve Hawn. language & culture	51%	48%	52%	53%	44%	48%	51%	45%
Helps to sustain Hawai‘i’s natural resources	51%	53%	46%	52%	45%	42%	55%	57%
Leadership role in solving community problems	41%	32%↓	29%	38%↑	32%	40%	39%	42%
BASE	599	599	447	447	396	400	198	200

Q6. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?”

2010 'Bottom Box' Dissatisfaction With Industry Involvement: By Island

Bottom box ratings (1-5 on the 10-point scale) continue to reveal more dissatisfaction on the Neighbor Islands and particularly, on Maui. Close to 3 in 5 Maui residents are dissatisfied with the industry's role in helping to *sustain Hawai'i's natural resources*, and over 2 in 5 are dissatisfied with its role in *sponsoring sports events* and in *respecting the State's multi-cultural heritage*.

<i>Bottom Box %</i>	O'AHU	HAWAI'I	MAUI	KAUA'I
Leadership role in solving community problems	68%	62%	60%	58%
Helps to preserve Hawn. language & culture	52%	47%	52%	55%
Helps to sustain Hawai'i's natural resources	47%	48%	58%	43%
Works to make Hawai'i a safe place for residents and visitors	36%	37%	38%	33%
Sponsors sports events for residents/visitors	31%	37%	42%	31%
Respects Hawai'i's multi-cultural heritage	29%	32%	44%	32%
Contributes to sustainable economy	25%	25%	31%	18%
BASE	599	447	400	200

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Tracking 'Bottom Box' Dissatisfaction With Visitor Involvement: By Island

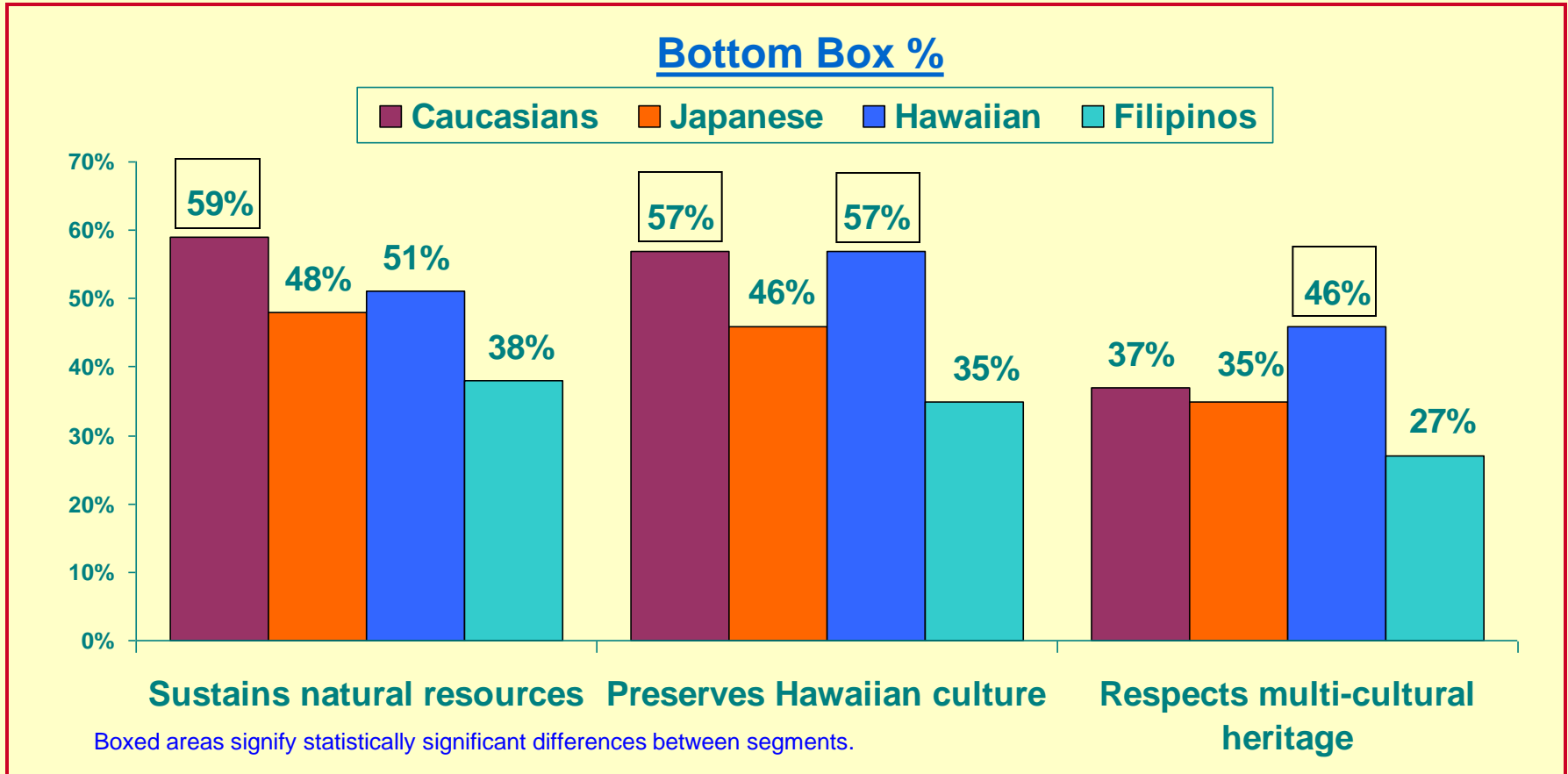
Compared with 2009, significantly more O'ahu residents in 2010 do not agree that the Visitor Industry has taken a leadership role in *solving community problems*. Big Island residents view the industry more positively in this area. There is also less disagreement on the Big Island in regard to Visitor Industry's *contribution to sustainable economy*.

Bottom Box %: Satisfaction with Industry	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2009	2010	2009	2010	2009	2010	2009	2010
Leadership role in solving community problems	59%	68% [↑]	71%	62% [↓]	68%	60%	61%	58%
Helps to preserve Hawn. language & culture	49%	52%	48%	47%	56%	52%	49%	55%
Helps to sustain Hawai'i's natural resources	49%	47%	54%	48%	55%	58%	45%	43%
Works to make Hawai'i a safe place for residents and visitors	32%	36%	38%	37%	41%	38%	29%	33%
Sponsors sports events for residents/visitors	36%	31%	50%	37% [↓]	46%	42%	50%	31% [↓]
Respects Hawai'i's multi-cultural heritage	26%	29%	33%	32%	37%	44%	34%	32%
Contributes to sustainable economy	23%	25%	33%	25% [↓]	33%	31%	21%	18%
BASE	599	599	447	447	396	400	198	200

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

2010 'Bottom Box' Dissatisfaction With Industry Involvement: By Ethnic Segment

Caucasians continue to be least satisfied with Visitor Industry's effort to *sustain the State's natural resources*. Close to 3 in 5 Native Hawaiians and Caucasians are dissatisfied with the industry's effort to *preserve Hawaiian language and culture*. And close to half Hawaiians feel the industry does not show enough effort to respect multi-culture heritage.



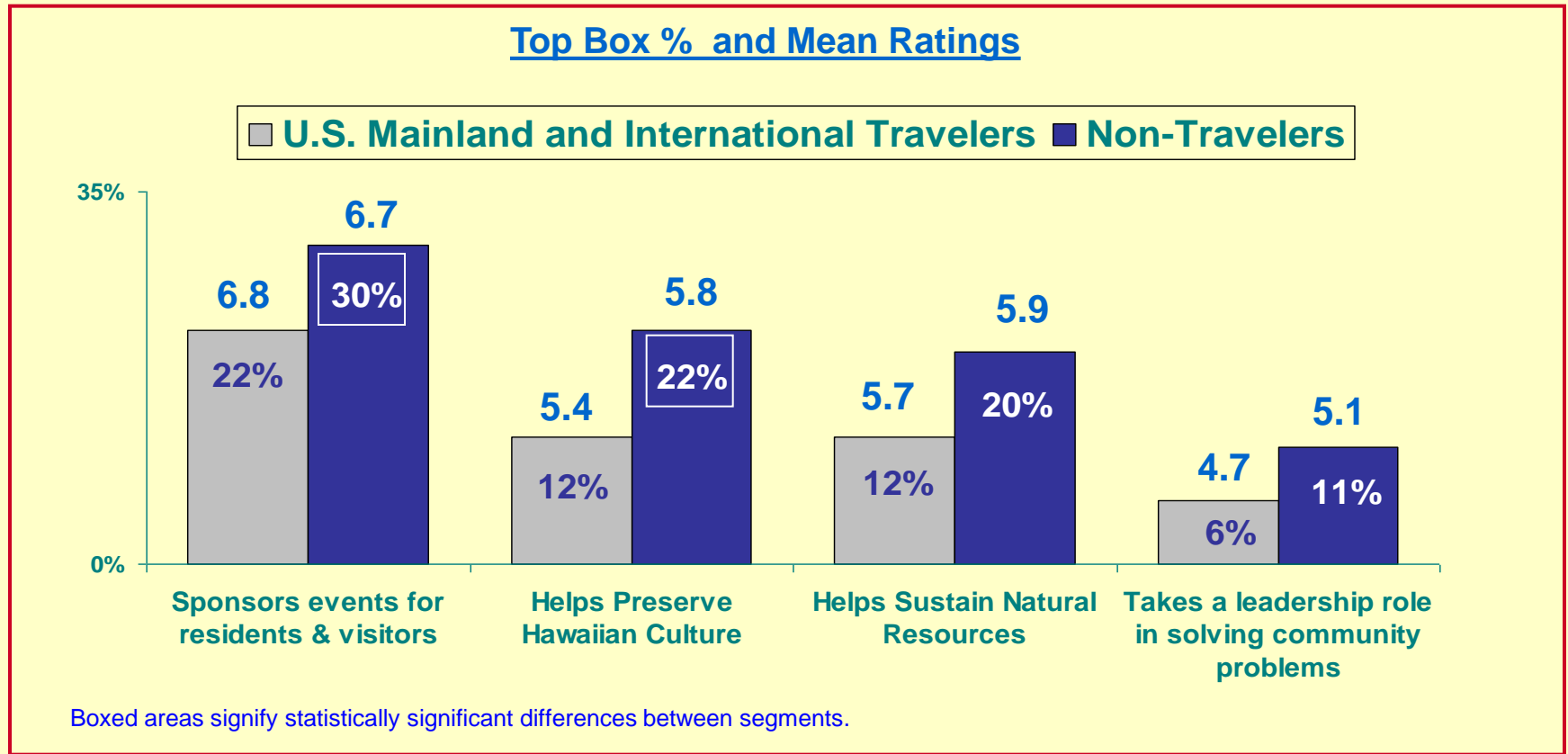
Bases: 570 Caucasians, 253 Japanese, 313 Hawaiian and 169 Filipino residents statewide in 2010.

* In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

2010 Satisfaction With Industry Involvement: Travelers vs. Non-Travelers

In 2010, top box satisfaction was higher among non-travelers than off-island travelers relative to the Visitor Industry *making Hawai'i a safe place, helping to preserve Hawaiian language and culture, and helping to sustain Hawai'i's natural resources.*



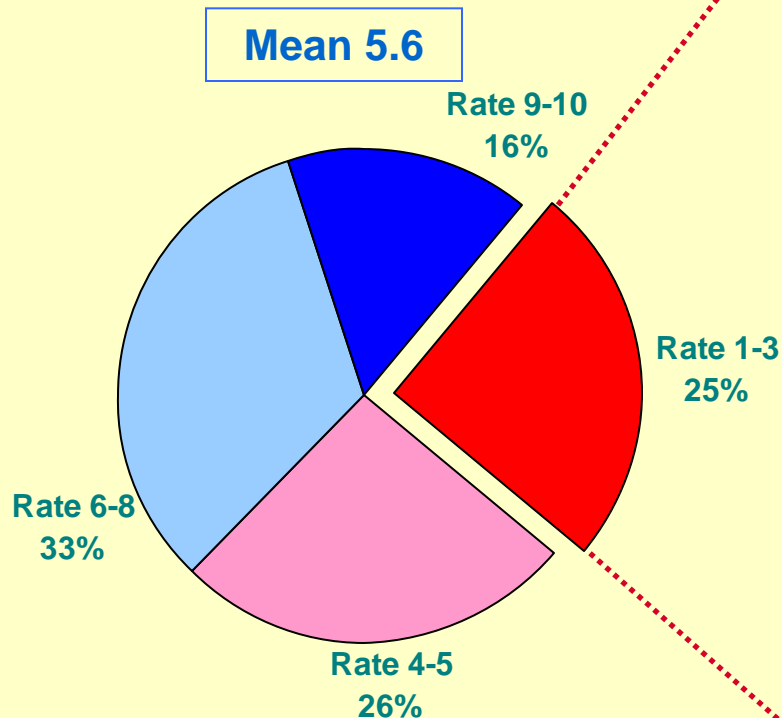
Bases: 953 residents who traveled interisland, to the US mainland or to international destinations, and 697 who did not travel at all.

Q6. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?"

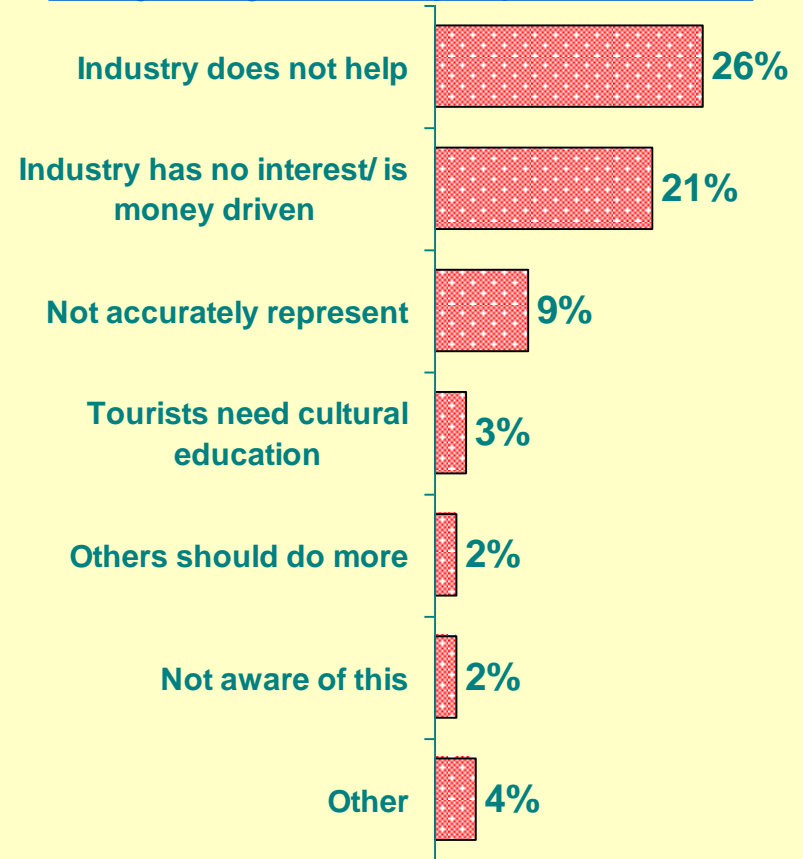
Rating Industry Low for: Helps to Preserve Hawaiian Culture

One in 4 residents gave low (1-3) ratings for the industry's role in preserving Native Hawaiian language and culture, and most low raters do not think the industry does anything positive in this area.

"How satisfied that the Visitor Industry helps to preserve Native Hawaiian language and culture?"



"Why did you rate (1-3) out of 10?"



Base: 369 residents who rated the Visitor Industry 1-3 on the 10-point scale.

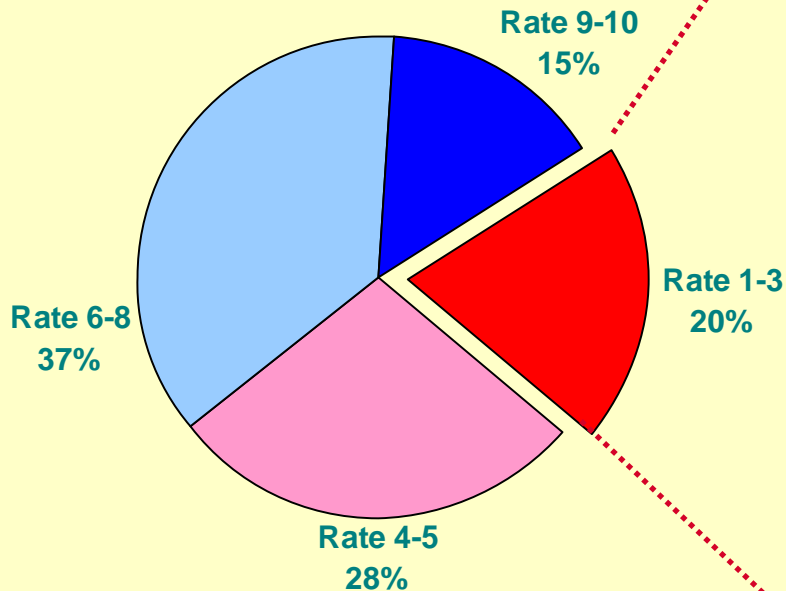
Q7. Why did you rate the Visitor Industry ____ out of 10? Any other reasons?

Low Ratings for: Helps to Sustain Natural Resources

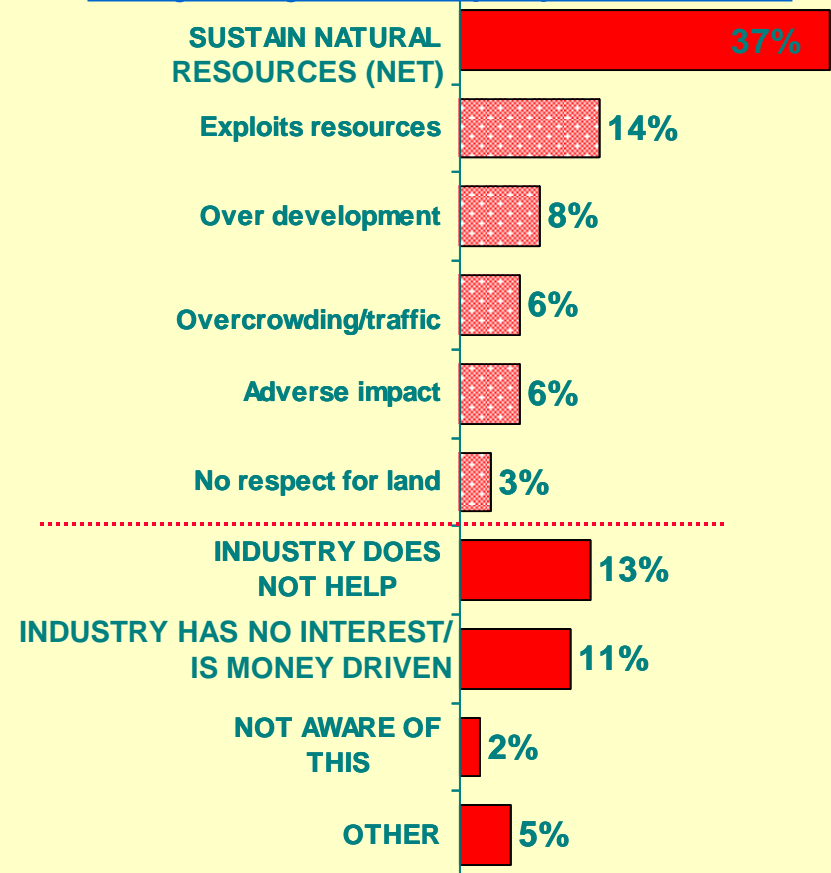
Many dissatisfied residents believe that the industry, far from sustaining resources, consumes or exploits Hawai'i's natural resources.

“How satisfied that the Visitor Industry helps to sustain Hawai'i's natural resources?”

Mean 5.8



“Why did you rate (1-3) out of 10?”



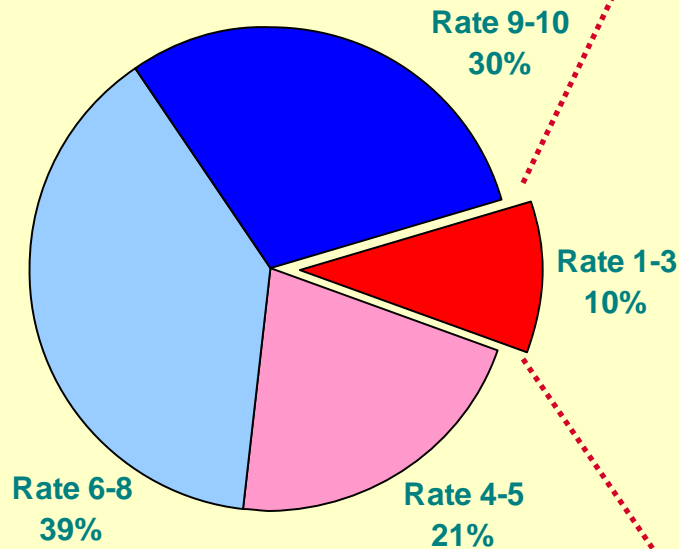
Base: 307 residents who rated the Visitor Industry 1-3 on the 10-point scale.
 Q7. Why did you rate the Visitor Industry ____ out of 10? Any other reasons?

Low Ratings for: Respect Multi-Cultural Heritage

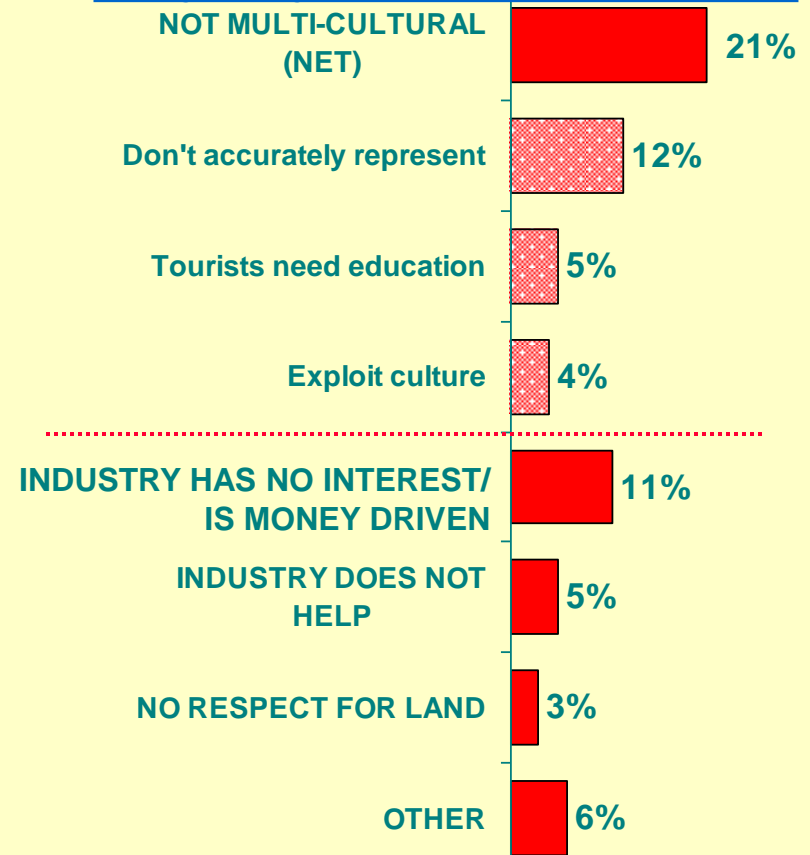
Many low raters do not feel the industry respects Hawaiian culture or other local cultures or has no interest in promoting multi-cultural heritage.

“How satisfied that the Visitor Industry respects Hawai‘i’s multi-cultural heritage?”

Mean 6.9



“Why did you rate (1-3) out of 10?”



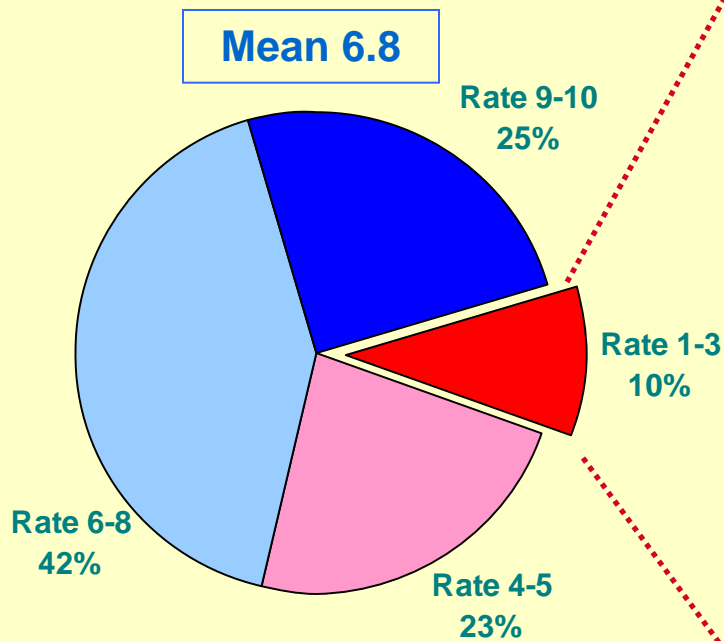
Base: 166 residents who rated 1-3 on the 10-point scale.

Q7. Why did you rate the Visitor Industry [10-3] out of 10? Any other reasons?

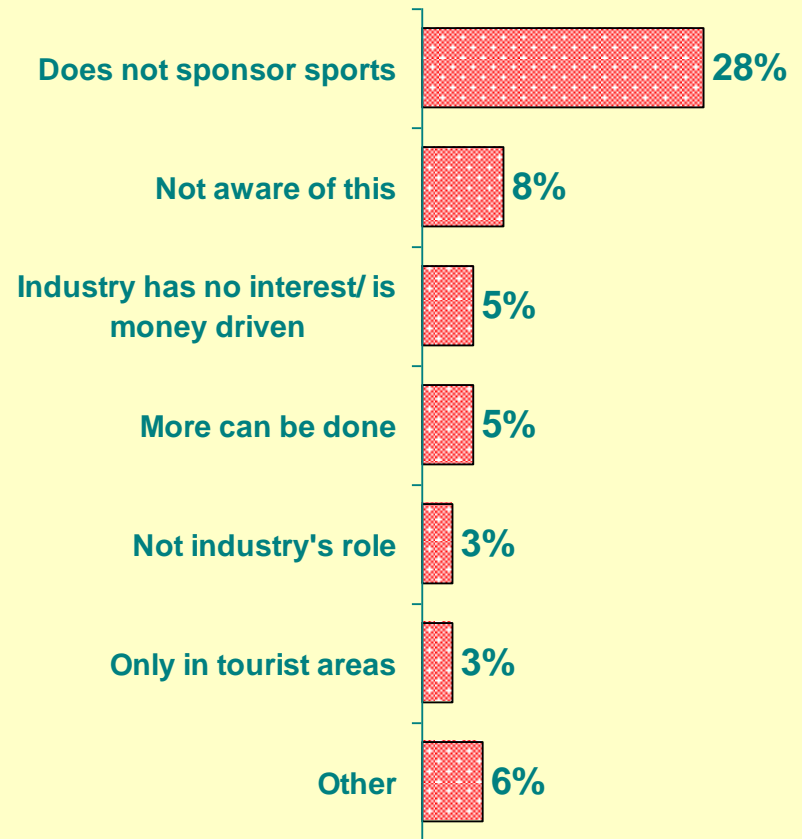
Low Ratings for: Sponsors Sports Events & Festivals

Low raters do not feel the industry plays a big role in local sports events and other festivals; or they are not aware of the industry's contribution to this area.

“How satisfied that the Visitor Industry sponsors sports events & other festivals for residents and visitors?”



“Why did you rate (1-3) out of 10?”



Base: 183 residents who rated the Visitor Industry 1-3 on the 10-point scale.

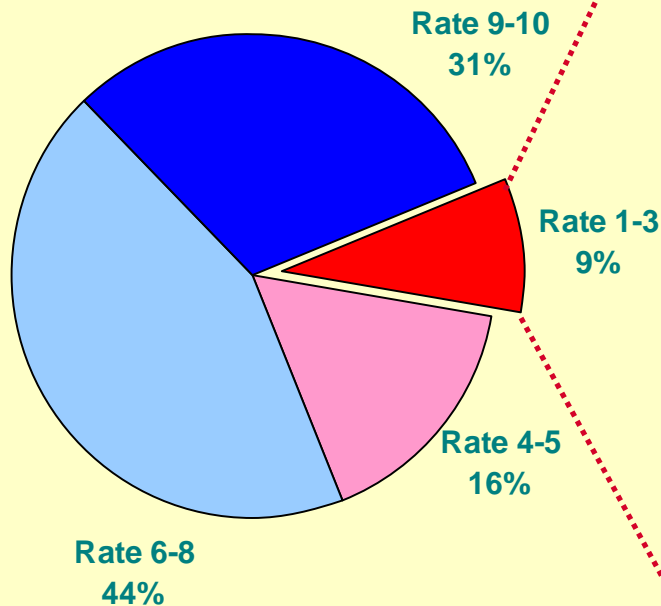
Q7. Why did you rate the Visitor Industry ____ out of 10? Any other reasons?

Low Ratings for: Contributes to Sustainable Economy

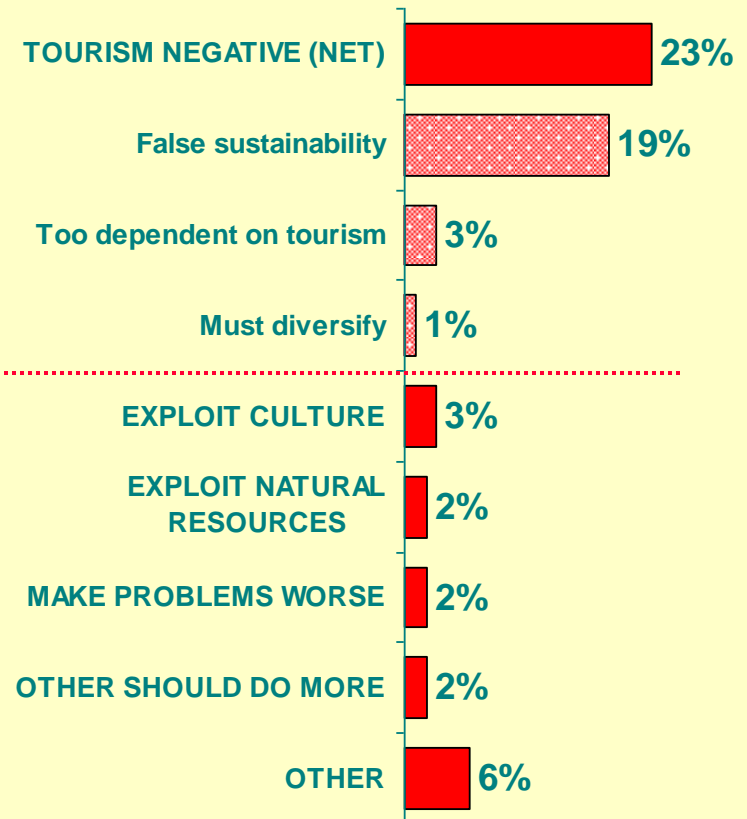
Low raters do not feel that tourism is a “sustainable” pillar of the economy. Some defined sustainability as job stability or economic self-sufficiency.

“How satisfied that the Visitor Industry contributes to a sustainable economy in Hawai‘i?”

Mean 7.2



“Why did you rate (1-3) out of 10?”



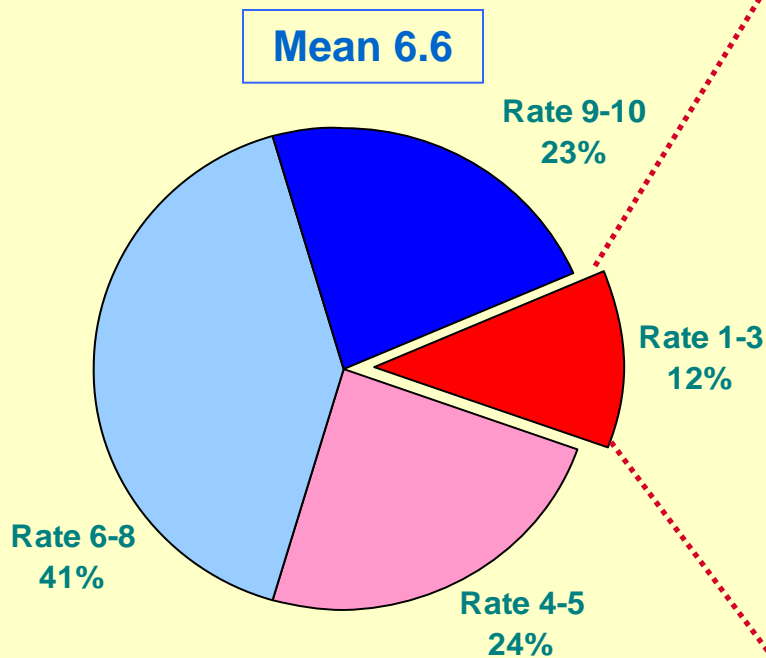
Base: 125 residents who rated 1-3 on the 10-point scale.

Q7. Why did you rate the Visitor Industry [1-3] out of 10? Any other reasons?

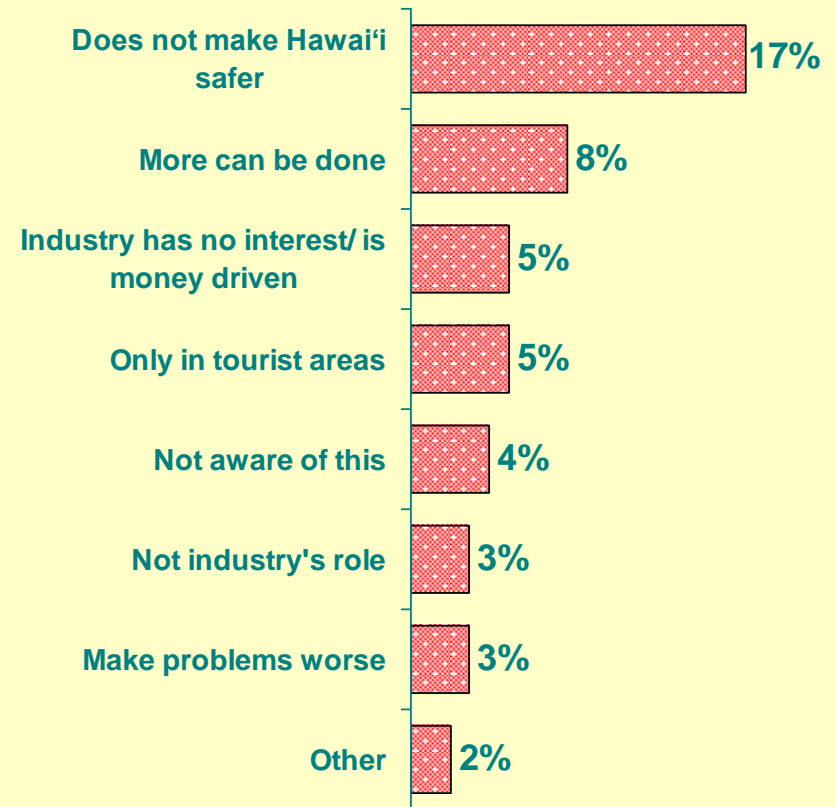
Low Ratings for: Works to Make Hawai'i a Safe Place

Low raters are not convinced the industry does much in the way of safety and security, and they feel that more can be done.

“How satisfied that the Visitor Industry works to make Hawai'i a safe place for residents and visitors?”



“Why did you rate (1-3) out of 10?”



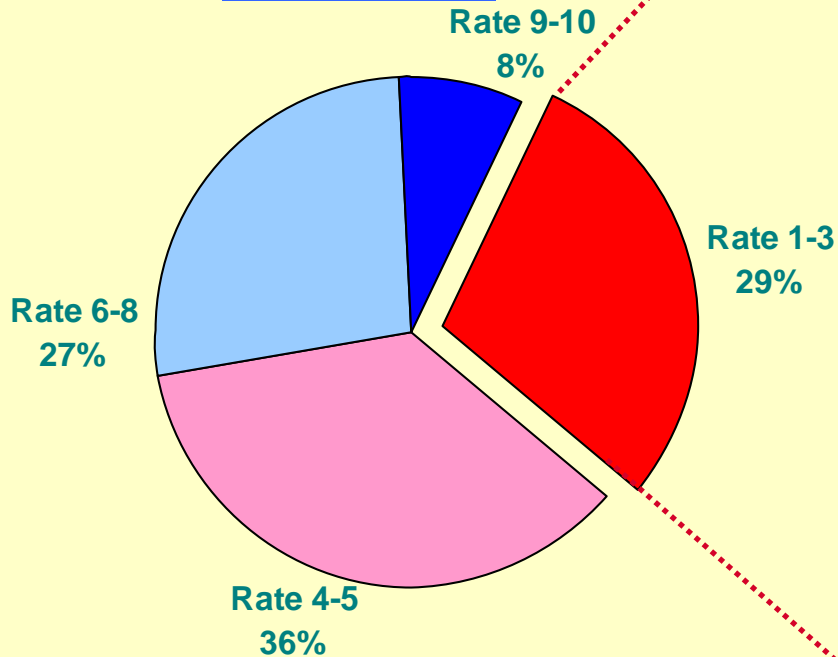
Base: 174 residents who rated the Visitor Industry 1-3 on the 10-point scale.
Q7. Why did you rate the Visitor Industry ____ out of 10? Any other reasons?

Low Ratings For: Leadership Role in Solving Community Problems

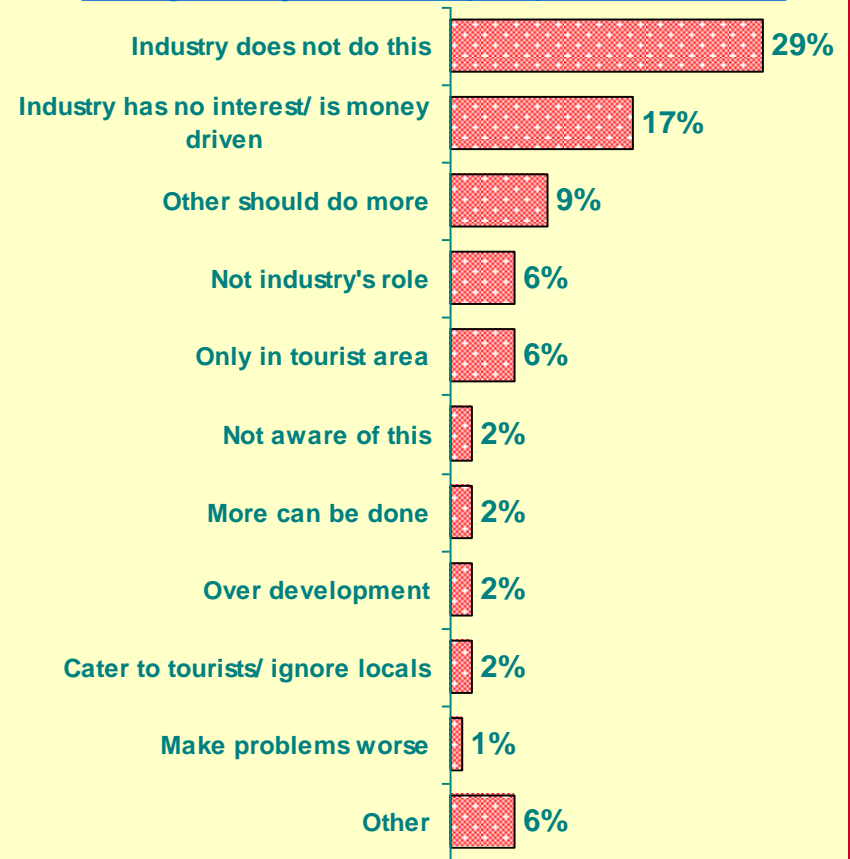
Close to 3 in 10 residents are not satisfied with the industry's role in solving community problems and most of them have difficulty believing that the industry plays a role in helping local communities.

"How satisfied that the Visitor Industry takes a leadership role in solving community problems?"

Mean 4.9



"Why did you rate (1-3) out of 10?"



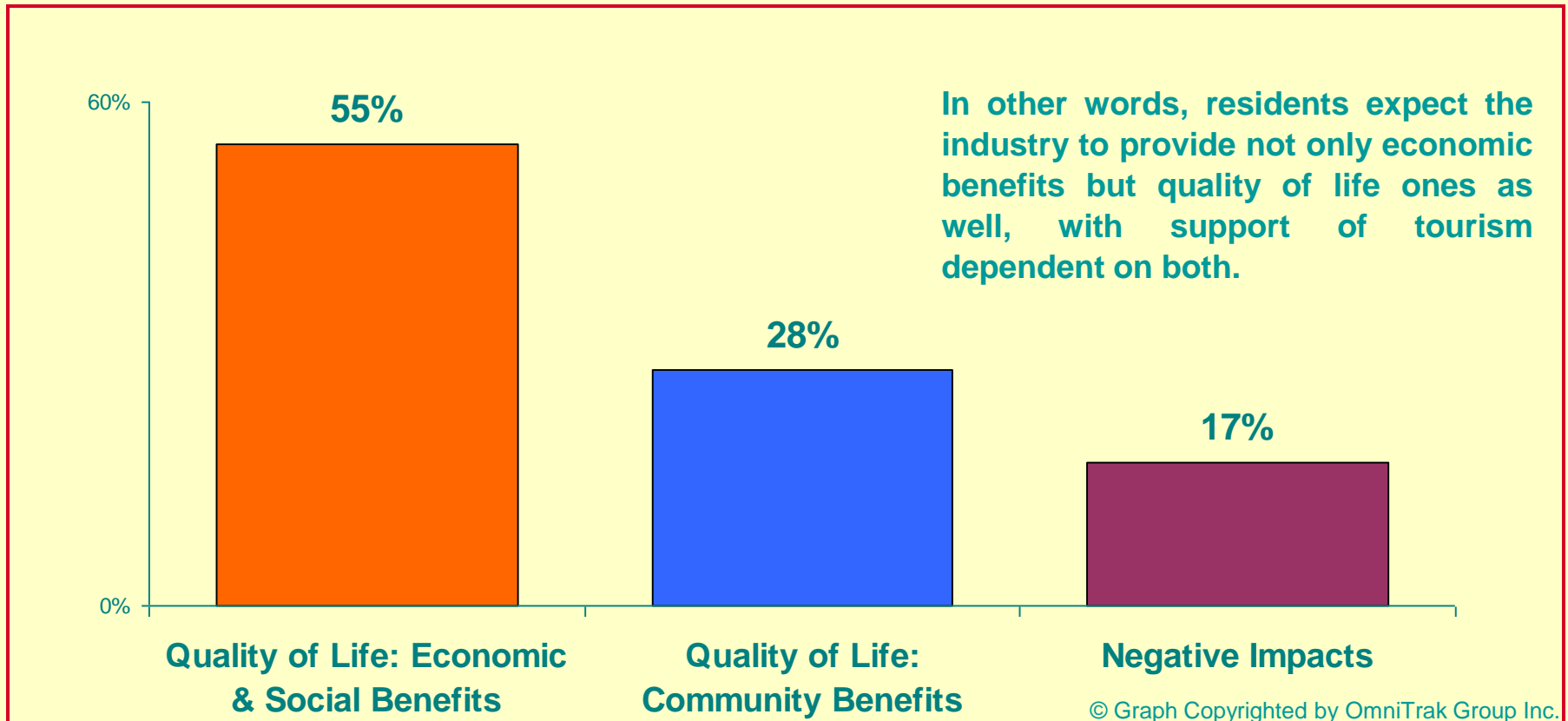
Base: 429 residents who rated the Visitor Industry 1-3 on the 10-point scale.

Q7. Why did you rate the Visitor Industry _____ out of 10? Any other reasons?

Key Drivers Of Perceptions Of Visitor Industry's Net Benefit

2010 Strength of Visitor Industry Driver Analysis™

Driver analysis determines what would most drive an increase in residents agreeing that the Visitor Industry provides a net benefit to the State. In 2010, 3 dimensions influence net benefit attitudes - combined economic and social benefits, community benefits and the mitigation of negative impacts. Economics/social benefits drive just over half of a 1-point increase in net benefit. Over one-quarter is driven by *quality of life* (Community Benefits) and less than one-fifth is driven by the *management of downsides* (Negative Impacts).



Q4: Using a 10-point scale where 10 means completely agree and 1 means do not agree at all, how much do you agree that ...?

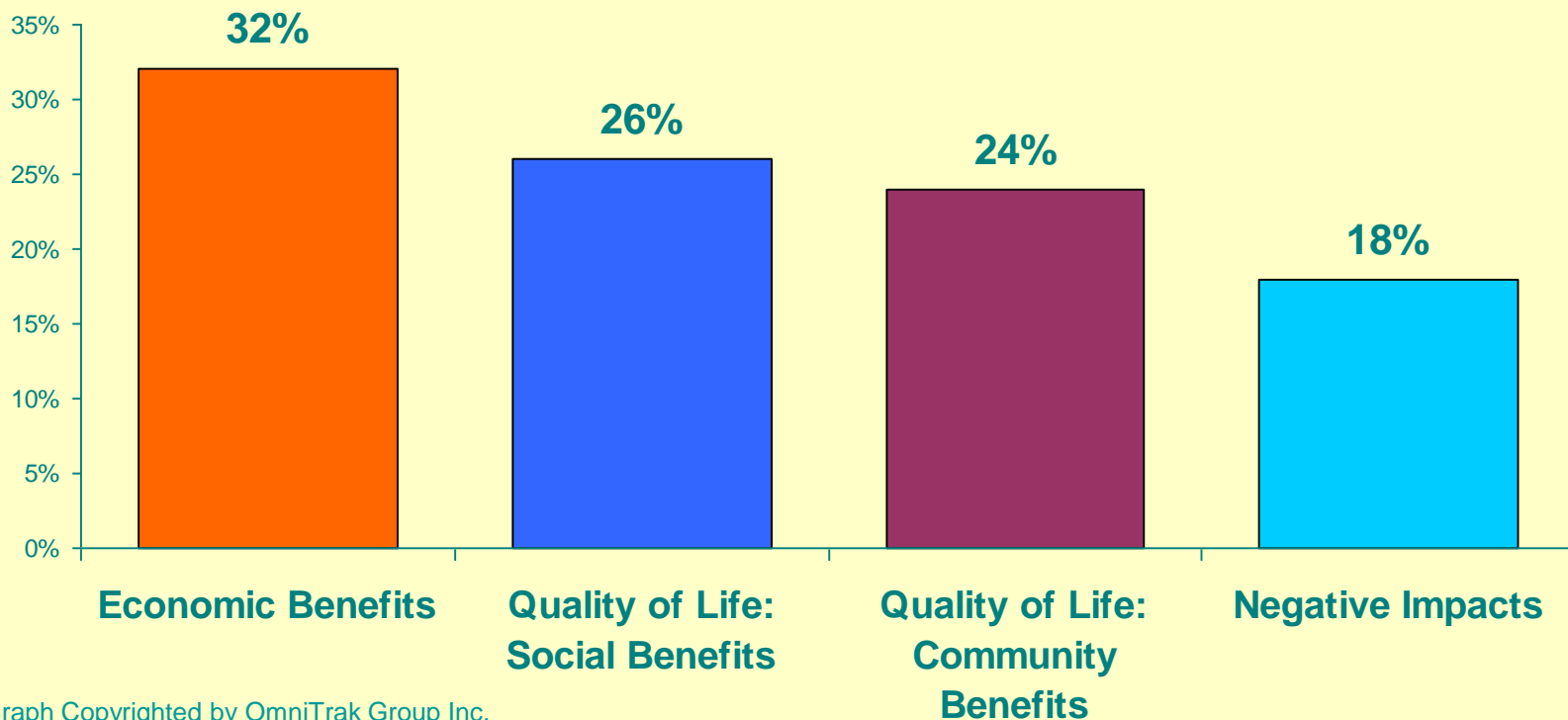
Q6: Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?



2009 Strength of Driver Analysis™

In 2009, four dimensions influenced net benefit attitudes. Although economic benefits were most important, accounting for one-third of a 1-point increase in net benefit, the two quality of life dimensions accounted for half of a 1-point increase. Managing perceived downsides contributes almost one-fifth of an improvement. This suggests that residents expected the State's dominant industry to provide not only economic benefits but quality of life as well. And support of tourism is dependent on both.

KEY DRIVERS IN PERCEPTIONS OF "NET BENEFIT"



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Q4: Using a 10-point scale where 10 means completely agree and 1 means do not agree at all, how much do you agree that ...?

Q6: Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you overall that the Visitor Industry...?

2010 Visitor Industry Driver Analysis™

The three drivers are composed of 16 specific attributes in 2010. They are shown in the order of importance within each driver. Within the economic/social benefits driver, the multiplier effect is somewhat more important to residents overall since not everyone seeks a job in the industry. Residents look toward the industry taking a leadership role in solving community problems, preserving Hawaiian culture and sustaining the State's natural resources. The most important negative impacts to mitigate traffic and over development. Compared to 2009, the economic/social driver includes economic and social benefit attributes into the top driver.

Tourism spending trickles down to local businesses

Tourism generates the most jobs for residents

Tourism offers good jobs for Hawai'i residents

Tourism is an industry whose success I care about

Tourism creates entertainment & enrichment opportunities

**Quality of Life:
Economic &
Social Benefits**

Takes leadership role in solving community problems

Helps to preserve Native Hawaiian language/culture

Helps to sustain Hawai'i's natural resources

Sponsors sports events for residents and visitors

Respects Hawai'i's multi-cultural heritage

Works to make Hawai'i a safe place for residents and visitors

Contributes to a sustainable economy in Hawai'i

**Quality of Life:
Community
Benefits**

Tourism is the major cause of traffic

Tourism is mainly responsible for over development

Tourism is most responsible for higher cost of living

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

**Negative
Impacts**

2009 Visitor Industry Driver Analysis™

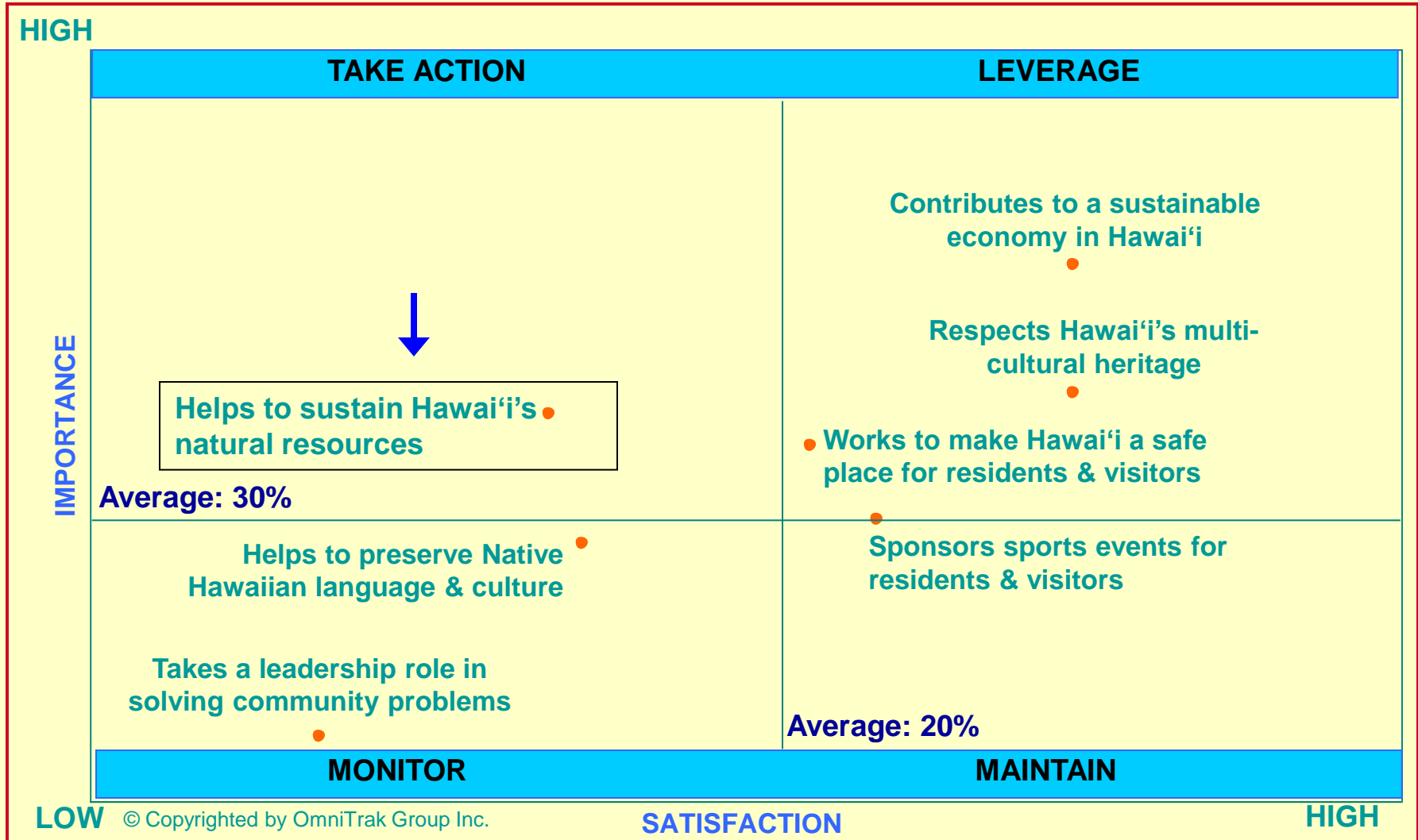
In 2009, the four drivers were composed of 15 specific attributes. They were shown in the order of importance within each driver. Within the economic benefits driver, the multiplier effect is somewhat more important to residents overall since not everyone seeks a job in the industry. In terms of social benefits, enrichment opportunities and a sustainable economy were most important. Residents also looked toward the industry taking a leadership role in solving community problems such as safety and preservation of cultural resources. The most important negative impacts to mitigate were cost of living and overdevelopment.

Tourism spending trickles down to local businesses Tourism generates the most jobs for residents	}	Economic Benefits
Creates entertainment & enrichment opportunities Contributes to a sustainable economy in Hawai'i Tourism is an industry I care about		
Takes leadership role in solving community problems Works to make Hawai'i a safe place Helps to preserve Native Hawaiian language/culture Respects Hawai'i's multi-cultural heritage Helps to sustain Hawai'i's natural resources Sponsors sports events for residents and visitors	}	Quality of Life: Community Benefits
Tourism is most responsible for higher cost of living Tourism is mainly responsible for overdevelopment Tourism is the major cause of traffic This island run for tourists at the expense of residents		

Need Gap Analysis

Need Gap Analysis: 2010

“Need Gap” occurs when satisfaction lags perceived importance, implying a need to bring satisfaction up to par with expectations. A need gap still exists in natural resource sustainability, as was the case in 2009. Areas to monitor continue to be: Native Hawaiian cultural preservation and the industry’s leadership in solving community problems.

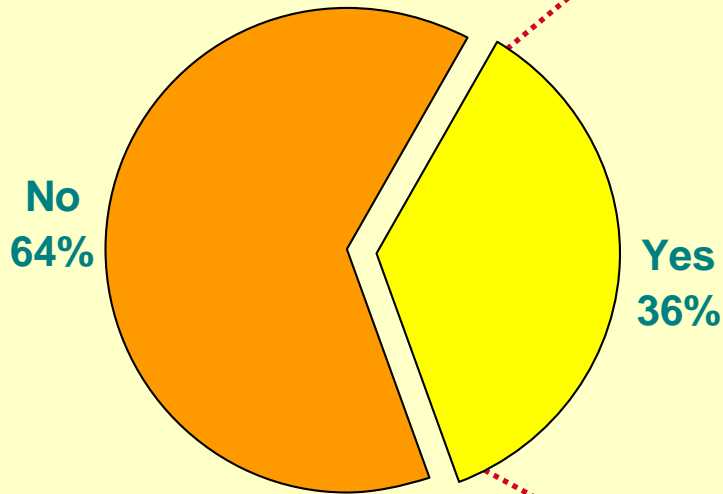


Attitudes Toward APEC

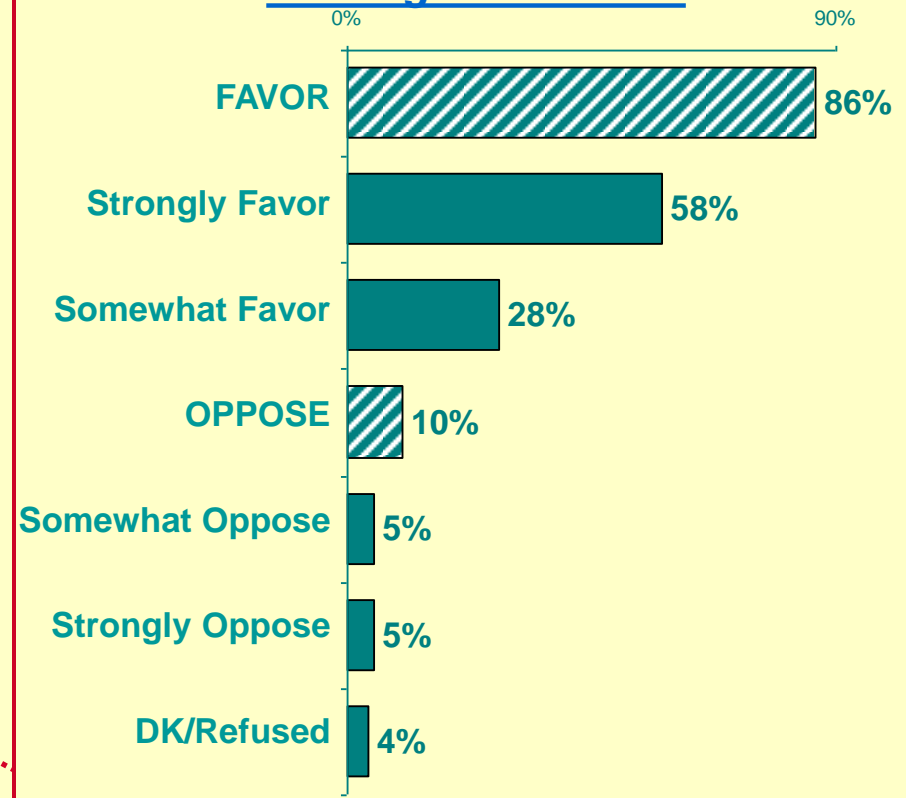
APEC Awareness and Favorability (NEW)

Awareness of the 2011 APEC meeting is not high at 36%, but those residents aware of APEC are extremely favorable to it taking place in Hawai'i.

"Have you heard that President Obama will host a meeting for Asia Pacific leaders in Hawai'i in 2011?"



(IF YES) "And overall, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this... meeting in Hawai'i?"



Base: Q8: 1650 residents statewide; Q9: 595.

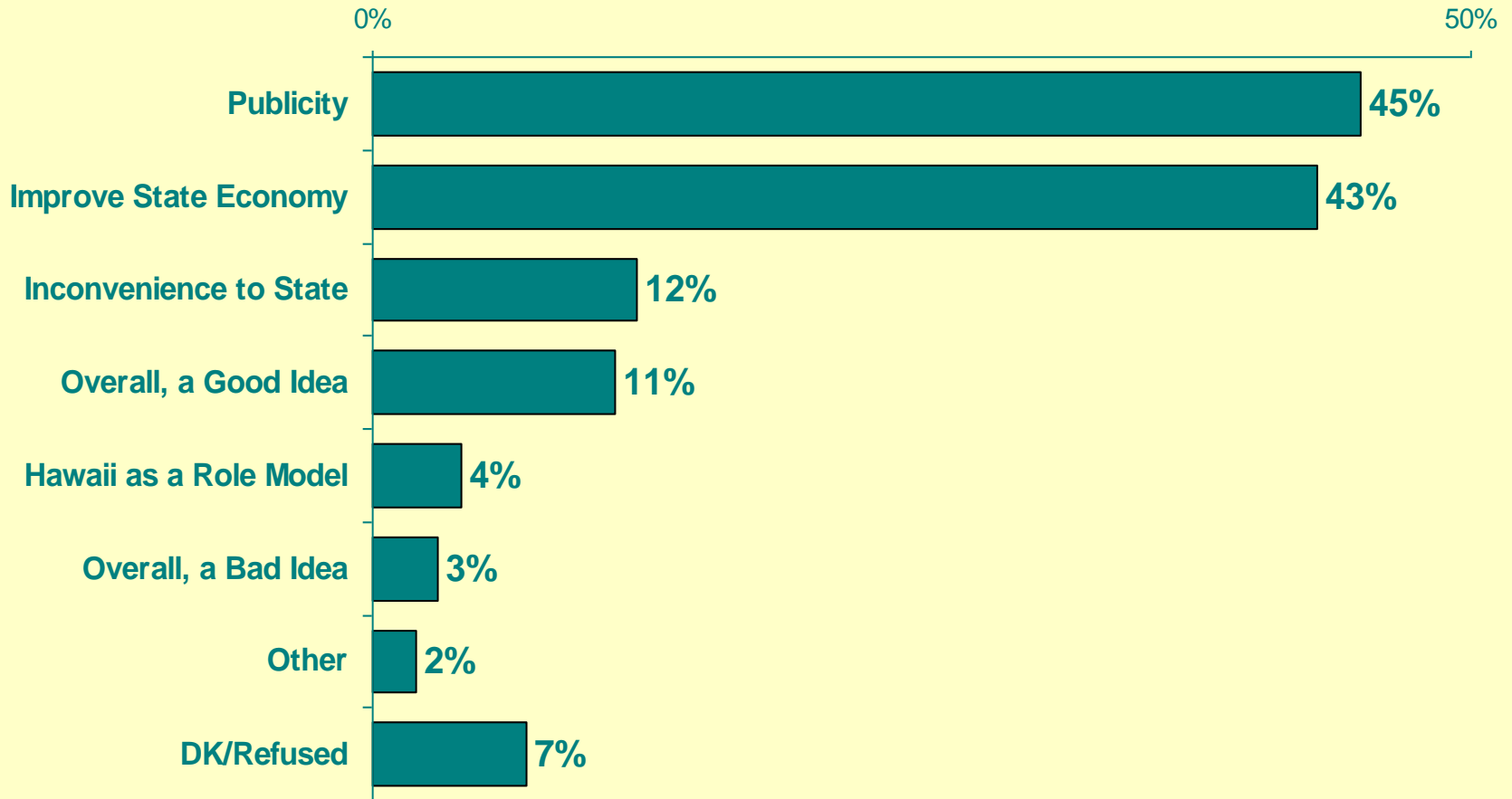
Q8: Have you seen or heard that President Obama will host a meeting for Asia Pacific economic leaders in Hawai'i in 2011?

Q9: [IF YES IN Q8, ASK:] And overall, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this APEC leaders meeting in Hawai'i?

Reasons for Rating APEC

The publicity generated from the APEC meeting, and the economic benefit to the State are the top reasons to favor hosting the APEC meeting in 2011.

(SAYING FAVOR OR OPPOSE APEC IN HAWAI'I) "Why do you say that?"



Base: 563 residents saying 'yes' to "Have you seen or heard that president Obama will host a meeting for APEC leaders in Hawai'i in 2011?"
Q10. [IF ANSWERED IN Q9, ASK:] Why do you say that?

Awareness and Opinion of APEC: By Island

Across the State, there is less awareness of the APEC meeting on the Neighbor Islands than on O‘ahu. Favorability of APEC is similar across counties.

<i>“Have you heard that President Obama will host a meeting for Asia Pacific leaders in Hawai‘i in 2011?”</i>	O‘AHU	HAWAI‘I	MAUI	KAUA‘I
YES	41%	23%	26%	42%
NO	59%	77%	74%	58%
BASE	600	450	400	200

<i>(IF YES) “Do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this meeting?”</i>	O‘AHU	HAWAI‘I	MAUI	KAUA‘I
Strongly Favor	58%	64%	54%	57%
Somewhat Favor	29%	27%	26%	18%
Somewhat Oppose	5%	2%	6%	4%
Strongly Oppose	5%	1%	5%	8%
BASE	292	127	113	63

Q8. Have you seen or heard that President Obama will host a meeting for Asia Pacific economic leaders in Hawai‘i in 2011?

Q9 (IF YES) And overall, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this APEC leaders meeting in Hawai‘i?

APPENDIX: Travel Patterns and Profile of Respondents

Resident Travel Patterns: 2010

Neighbor Island residents are more likely to travel to the other islands while O‘ahu residents are more likely to travel to the U.S. mainland. Big Island residents are less likely to travel to the U.S. mainland or internationally.

No. trips taken for pleasure/business to Neighbor Islands?	STATE	O‘AHU	HAWAI‘I	MAUI	KAUA‘I
None	47%	53%	32%	30%	35%
1	17%	18%	17%	12%	12%
2	11%	11%	11%	13%	11%
3	8%	7%	8%	13%	7%
4	4%	2%	7%	10%	13%
5+	12%	7%	23%	21%	18%
Mean (including 0)	2.0	1.5	3.2	3.4	3.0
No. trips taken to the mainland U.S.?					
None	46%	44%	54%	46%	50%
1	25%	25%	23%	26%	22%
2	13%	13%	13%	11%	13%
3	6%	7%	2%	6%	6%
4	5%	5%	3%	6%	2%
5+	4%	4%	3%	4%	4%
Mean (including 0)	1.2	1.3	0.9	1.1	1.0
No. Trips taken to any international destination?					
None	78%	76%	83%	84%	84%
1	14%	15%	13%	10%	9%
2	3%	4%	1%	3%	3%
3+	2%	3%	1%	2%	1%
Mean (including 0)	0.3	0.4	0.2	0.2	0.2
BASE	1,650	600	450	400	200

Profile of Respondents: 2010

	STATE	O'AHU	HAWAI'I	MAUI	KAUA'I
GENDER					
Male	39%	39%	39%	41%	34%
Female	61%	61%	61%	59%	66%
AGE *					
18-34	31%	31%	35%	34%	23%
35-54	34%	35%	33%	28%	35%
55+	34%	34%	31%	37%	42%
Average	46.8	47.0	45.2	46.4	50.3
INCOME **					
Less than \$35,000	22%	21%	32%	22%	18%
\$35,000 but less than \$75,000	38%	36%	37%	43%	54%
\$75,000 or more	40%	43%	31%	35%	28%
BASE	1,650	600	450	400	200

Profile of Respondents: 2010

	STATE	O'AHU	HAWAI'I	MAUI	KAUA'I
YEARS IN HAWAI'I					
Less than 5 years	8%	9%	7%	6%	1%
5 to 9 years	7%	5%	9%	12%	6%
10 to 19 years	8%	7%	7%	15%	9%
20 years or more	18%	17%	20%	22%	20%
Born in Hawai'i	58%	60%	55%	44%	59%
ETHNIC BACKGROUND					
Caucasian	21%	16%	34%	34%	29%
Hawaiian/part-Hawaiian	25%	24%	31%	25%	29%
Japanese	18%	21%	12%	9%	12%
Filipino	12%	12%	6%	16%	16%
Other	24%	27%	17%	16%	14%
TOURISM EMPLOYMENT					
Employed in Industry *	28%	24%	32%	46%	34%
Not employed	72%	76%	67%	55%	66%
BASE	1,650	600	450	400	200

* Tourism Employment is defined as those currently employed in the Visitor Industry or those with household members employed in the Industry.