

# 2012 Resident Sentiment Towards Tourism

October 2012



# Research Objectives

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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 nine times since 1999, and the current survey was conducted by OmiTrak Group, Inc. 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.
  - To identify for the Visitor Industry and HTA, issues or concerns regarding Tourism expressed by residents.

# Sample (1 of 2)

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- The 2012 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: 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 2010 update.
- 2012 represents the third survey conducted by OmniTrak, following the first conducted in 2009, and the second in 2010. This report compares primarily 2010 vs. 2012 results, with tracking since 1988 shown where the data is available.

## Sample (2 of 2)

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The survey sample was distributed as follows:

	SAMPLING QUOTA	SAMPLING ERROR
CITY & COUNTY OF HONOLULU	600	+/- 4%
HAWAI'I COUNTY	450	+/- 5%
MAUI COUNTY	400	+/- 5%
KAUA'I 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

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- 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: May 7 to June 31, 2012.
- 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 2010 and 2012.

# Key Conclusions

# Key Conclusions (1 of 2)

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1. **PUBLIC SENTIMENT TOWARDS TOURISM REMAINS HIGH FOR THE STATE OF HAWAII.**
  - Top Box ratings, a measure of strong support, remained high at 43 percent with overall favorable support at 89 percent. Also average ratings by residents continue to be high at 8.0 in 2012 compared to 8.1 in 2010.
  - When asked about Tourism's impact on the State of Hawai'i, residents gave Top Box Ratings of 40 percent with overall favorable ratings of 86 percent. Average ratings by residents was a moderate 7.9.
  
2. **CRITICISM INCREASES WHEN ECONOMY IMPROVES .** In good times, residents are more critical of the industry; in bad times, a higher value is placed on Tourism. This correlation, may be due to the industry's role as a leading employer and that jobs are the main economic concern of Hawai'i residents.
  
3. **POSITIVE RATINGS OF IMPACT OF TOURISM TO RESIDENTS AND THEIR FAMILIES REMAINED COMPARABLE FROM 2005 – 2009 BUT THE AVERAGE RATING DECREASED SIGNIFICANTLY DUE MAINLY TO CHANGE IN RESIDENTS NOT DIRECTLY AFFILIATED WITH THE VISITOR INDUSTRY.** Average rating for this measure decreased significantly from 7.0 in 2010 to 6.5 in 2012. While those who say the impact has been positive has remained relatively unchanged at 50 percent. The decrease in average ratings is a direct result of an increase in negative ratings and a decrease in those who say Tourism has no impact, this group is comprised mainly of households not affiliated with the Visitor Industry.
  
3. **THE PERCEIVED NET BENEFIT OF TOURISM HAS DECREASED IN 2012.** Top Box ratings and mean ratings have decreased among residents who agree that Tourism has brought more benefits than problems. In 2012, two-thirds of Hawai'i residents agree that Tourism has more benefits than problems, its lowest level since 1988.

# Key Conclusions (2 of 3)

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5. **THE PERCEIVED NEGATIVE EXTERNALITIES CREATED BY TOURISM HAVE INCREASED.** More Hawai'i residents agree that "Their island is run for tourists," that "The industry increases the cost of living," and is "A major cause of traffic" increased significantly in 2012. A newly added question: "My island is too dependent on Tourism" received the highest agreement with a mean rating of 7.6 and Top Box of 39 percent.
6. **AGREEMENT WITH POSITIVE VISITOR INDUSTRY STATEMENTS IS NEUTRAL.** New positive questions were added in 2012; the statement "Tourism presents Native Hawaiian culture authentically" netted an average rating of 5.4, while the statement "Tourism is consistent with my community's values" netted a mean rating of 5.8.
7. **IMPORTANCE RATINGS FOR VISITOR INDUSTRY ISSUES:** The most important issues involving the industry are in "Creating jobs with opportunities for advancement," "Creating shopping/entertainment," and "Creating well paying jobs." Residents of Maui and Kaua'i placed a significantly higher level of importance on Tourism in "Creating well paying jobs" compared to other areas of the state. Tourism's role in "Creating jobs with opportunities for advancement" and "Enhancing residents' quality of life" were also more important to Maui residents than other residents.
8. **SATISFACTION RATINGS FOR VISITOR INDUSTRY ISSUES:** State of Hawai'i residents were most satisfied with Tourism's involvement in "Creating shopping/entertainment," followed by "Sponsoring festivals," and "Creating well paying jobs." Dissatisfaction was highest with Tourism's role in preserving Native Hawaiian culture. Maui Residents were significantly more satisfied with Tourism's role in "Creating well paying jobs", "Creating jobs with opportunities for advancement," and "Enhancing quality of life" compared to other residents. While O'ahu and Maui residents were more satisfied with "Creating shopping opportunities."

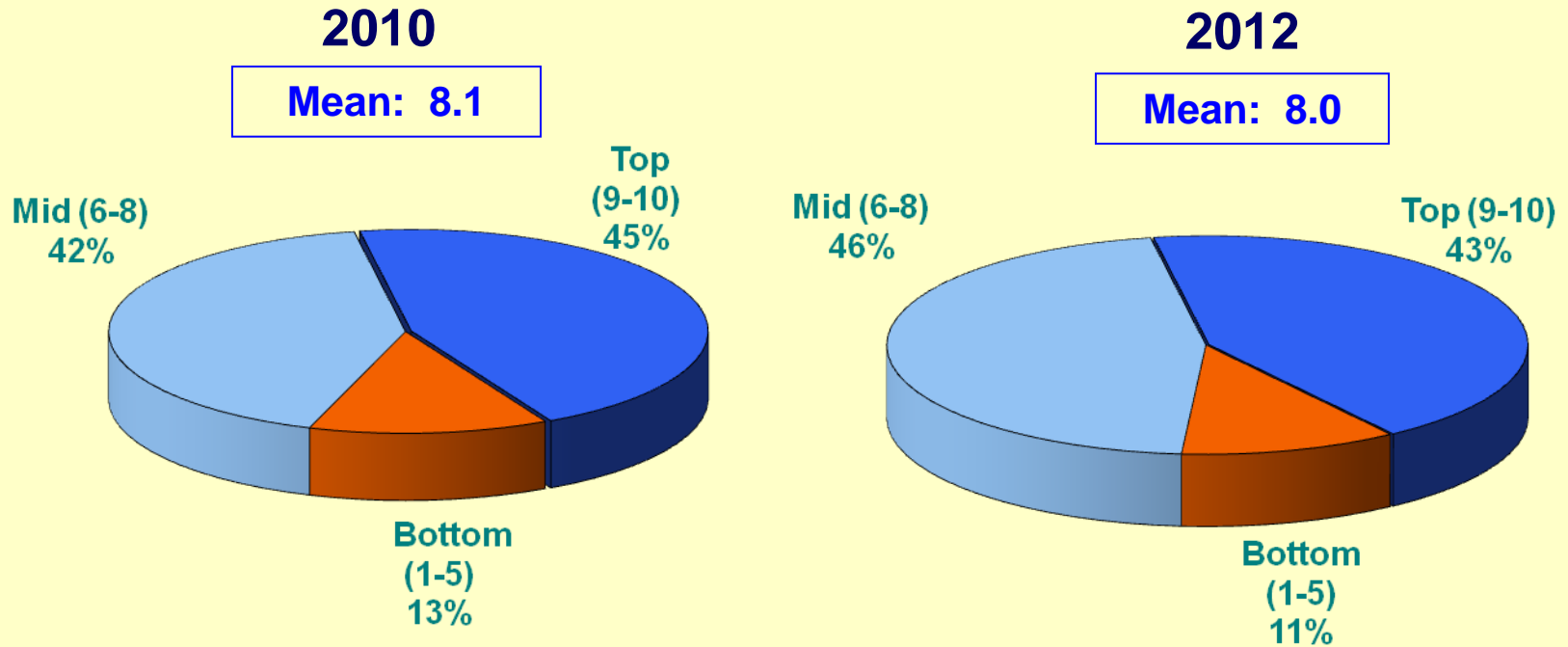


# Tracking Overall Favorability Toward Tourism

# Overall Support of Tourism Favorable

Public sentiment towards Tourism remains high. Favorability ratings among Hawai'i residents were stable between 2010 and 2012. Over two out of five residents (43%) rated Tourism in the Top Box (9 – 10 ratings) while slightly more than one in ten residents (11%) were unfavorable (1 – 5 ratings) towards Tourism.

“Using a 10-point scale where 10 is Extremely Favorable and 1 is Not Favorable At All, please give me your opinion of Tourism as an industry in Hawai'i”



Base: 1,650 statewide residents each in 2010 and 2012.

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 County

On the County level, Tourism favorability trends follow those on the State level. Top Box support decreased among all Counties, while mid-box support increased in all Counties. In 2012, O’ahu residents have the highest level of favorability towards Tourism, while Kaua’i residents noticeably were significantly less favorable towards Tourism.

Shaded areas signify statistically significant differences between segments, while an arrow ↑ or ↓ indicates significant changes since 2010.

<i>“Please give me your opinion of Tourism.”</i>	O’AHU		HAWAI’I ISLAND		MAUI		KAUA’I	
	2010	2012	2010	2012	2010	2012	2010	2012
Top Box (9-10)	45%	44%	42%	36%	49%	43%	48%	39%
Mid-Box (6-8)	42%	47%	45%	46%	34%	42%	36%	43%
Bottom Box (1-5)	13%	9%	13%	18%	16%	15%	16%	18%
MEAN	8.1	8.1	7.9	7.6	8.1	7.9	8.2	7.5↓
<b>BASE</b>	<b>600</b>	<b>600</b>	<b>450</b>	<b>450</b>	<b>400</b>	<b>400</b>	<b>200</b>	<b>200</b>

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?

# Tourism Favorability: By Specific Geography

Favorability, though consistently high across O‘ahu, is slightly higher in Urban Honolulu and slightly lower in Wai‘anae. On Hawai‘i Island, favorability is higher in West Hawai‘i, with significantly lower Bottom Box ratings compared to East Hawai‘i. Favorability for Tourism in Maui County is slightly lower on Moloka‘i compared to Maui island or Lana‘i.

<i>“Please give me your opinion of Tourism.”</i>	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Top Box (9-10)	45%	44%	41%	43%	42%
Mid-Box (6-8)	48%	46%	42%	47%	46%
Bottom Box (1-5)	7%	9%	17%	10%	11%
MEAN	8.2	8.1	7.6	8.0	7.8
<b>BASE</b>	<b>240</b>	<b>150</b>	<b>60</b>	<b>90</b>	<b>60</b>

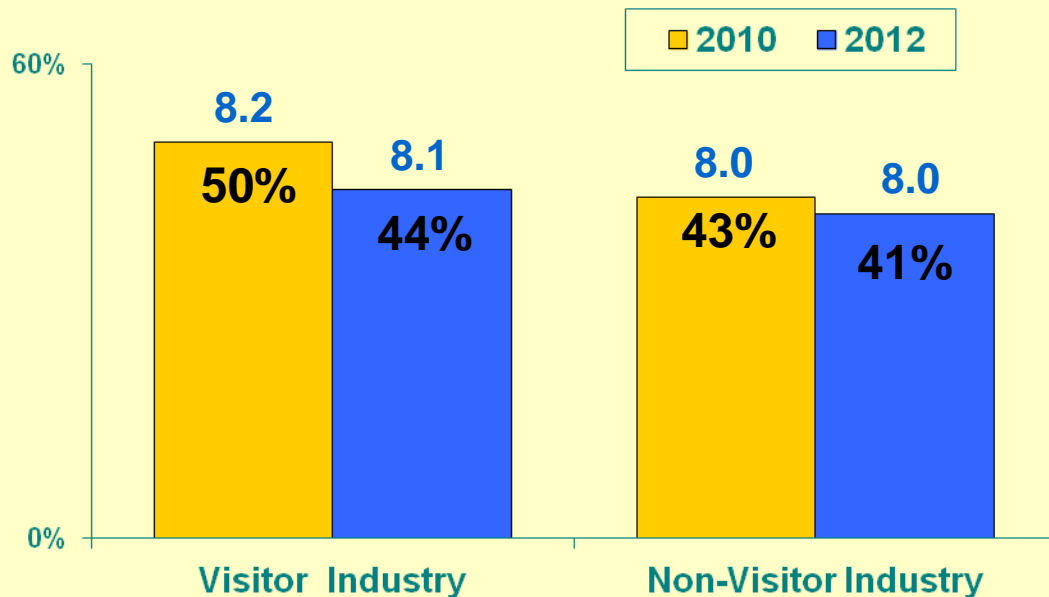
<i>“Please give me your opinion of Tourism.”</i>	HAWAI‘I		MAUI				KAUA‘I
	West Hawai‘i	East Hawai‘i	West Maui	Central East Maui	Moloka‘i	Lana‘i	
Top Box (9-10)	39%	34%	42%	46%	35%	42%	39%
Mid-Box (6-8)	51%	42%	43%	40%	42%	46%	43%
Bottom Box (1-5)	10%	24%	14%	15%	22%	13%	18%
MEAN	7.9	7.4	8.1	7.8	7.5	7.9	7.5
<b>BASE</b>	<b>225</b>	<b>225</b>	<b>100</b>	<b>175</b>	<b>75</b>	<b>50</b>	<b>200</b>

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-Visitor Industry

In 2012, Top Box favorability among households currently employed in the Visitor Industry was only three points higher than Non-Visitor Industry households, a decrease from 2010 when this premium was seven points higher for Visitor Industry households. The average rating for Visitor Industry households was only slightly higher than Non-Visitor Industry households with a score of 8.1 compared to 8.0.

## Top Box (9-10) % Extremely Favorable and Mean Ratings



Visitor Industry household favorability premium over the Non-Visitor industry household, decreased from 7 points in 2010 to 3 points in 2012.

Base: Residents with a household member employed by the visitor industry: 428 (2010) and 390 (2012); Households where no one is employed in Tourism: 1222 (2010) and 1260 (2012).

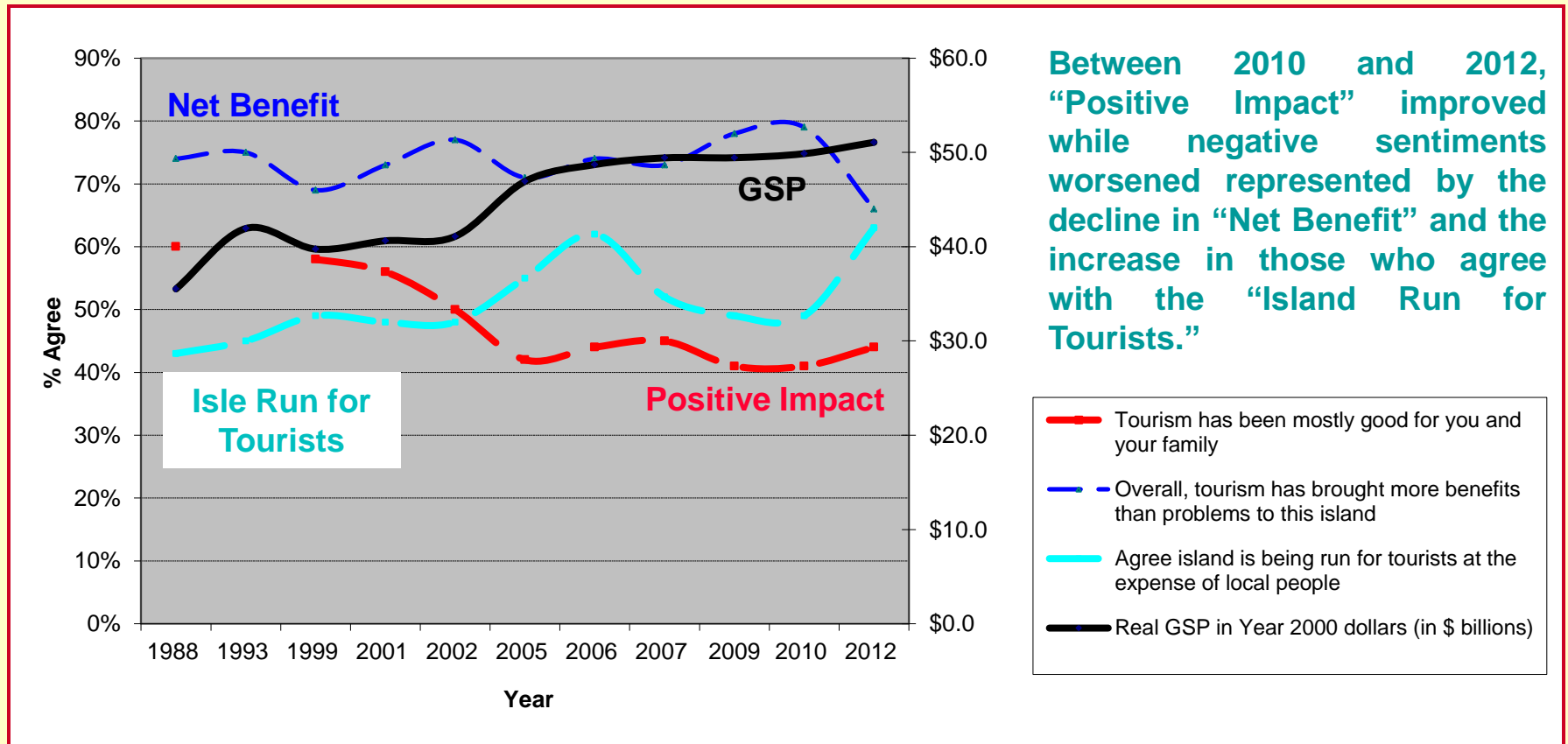
Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

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

# Criticism Increases When Economy Improves

Regression analysis of key perceptions of Tourism in relation to Gross State Product (GSP)\* reveals that attitudes toward the Visitor Industry correlate in the long term with the economy ( $r^2=0.88$ ). In good times, residents are more critical of the industry; in bad times, a higher value is placed on Tourism. This correlation, may be due to the industry's role as a leading employer and that jobs are the main economic concern of Hawai'i residents.



\* Source for GSP: State of Hawai'i, 2009 Data Book, for 1988 – 2009; Actual and Forecast of Key Economic Indicators for Hawai'i: 2010 - 2015, for 2010 & 2012. 2010 & 2012 GSP was converted into 2000 dollars from State source.

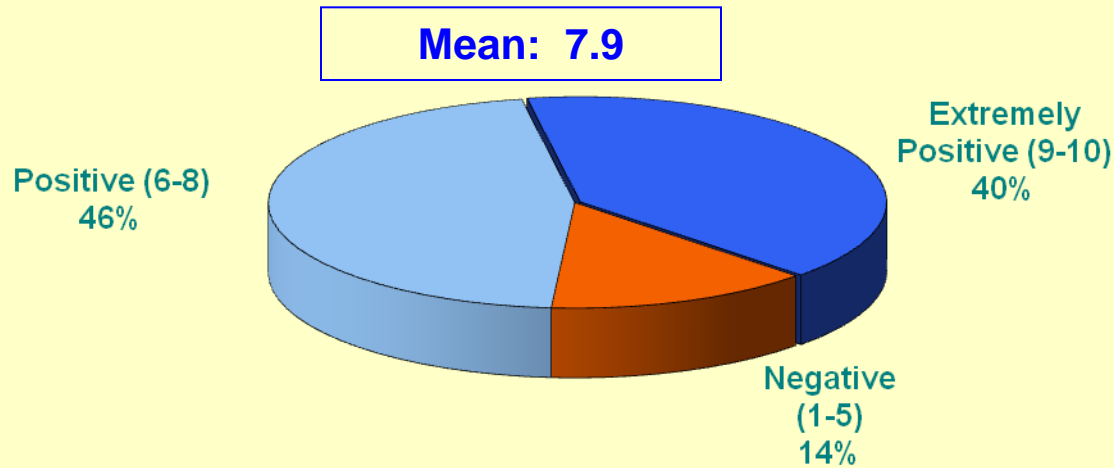
# Tracking Overall Impact Of Tourism



# Overall Impact of Tourism to the State Perceived as Positive

In 2012, a new question was asked, relating to the overall impact Tourism has on the State of Hawai'i. 86% rate the overall impact tourism has on the State as "positive" or "extremely positive". The highest level of favorability for this question was on O'ahu and Maui, both of which had statistically significantly higher Top Box support and mean ratings.

"How would you rate the overall impact Tourism has on the State as a whole?"



	O'AHU	HAWAI'I	MAUI	KAUAI
Top Box (9-10)	42%	32%	44%	38%
Mid Box (6-8)	47%	47%	39%	41%
Bottom Box (1-5)	11%	21%	16%	21%
Mean	8.0	7.4	7.9	7.6
BASE	600	450	400	200

Base: 1,650 statewide residents in 2012.

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 the state as a whole?

# Overall Impact of Tourism to the State: By Specific Geography

Across O‘ahu, a high percentage of residents consistently believe that Tourism has a positive impact on the State. On Hawai‘i Island, mean ratings are higher in the West Hawai‘i region compared to East Hawai‘i. Tourism impacts are received more positively on West Maui as compared to other areas of Maui.

“Overall Impact on the State”	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Top Box (9-10)	42%	46%	46%	36%	35%
Mid-Box (6-8)	47%	43%	34%	49%	58%
Bottom Box (1-5)	10%	11%	18%	14%	7%
MEAN	8.1	8.1	7.9	7.8	7.9
BASE	240	150	60	90	60

Shaded areas signify statistically significant differences between segments.

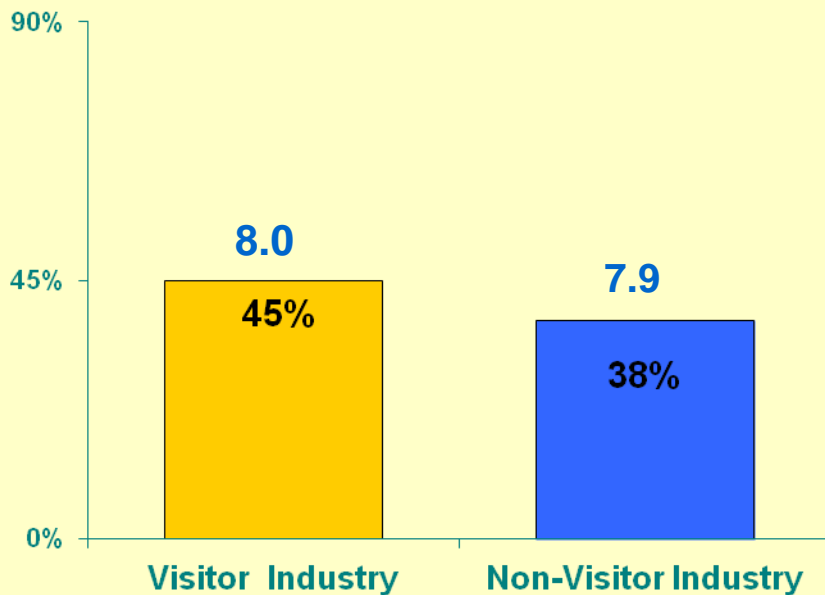
“Overall Impact on the State”	HAWAI‘I		MAUI				KAUA‘I
	West Hawai‘i	East Hawai‘i	West Maui	Central East Maui	Moloka‘i	Lana‘i	
Top Box (9-10)	37%	28%	47%	41%	37%	24%	38%
Mid-Box (6-8)	45%	48%	38%	40%	46%	60%	41%
Bottom Box (1-5)	17%	24%	16%	18%	16%	16%	21%
MEAN	7.8	7.1	8.0	7.7	7.3	7.3	7.6
BASE	225	225	100	175	75	50	200

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 the state as a whole?

# Overall Impact of Tourism to State: Visitor Industry vs. Non-Visitor Industry

Top box or extremely positive ratings on the overall impact of Tourism to the State were directionally higher among households affiliated with the Visitor Industry compared to those who are not affiliated with the industry.

## Top Box (9-10) % Extremely Positive and Mean Ratings



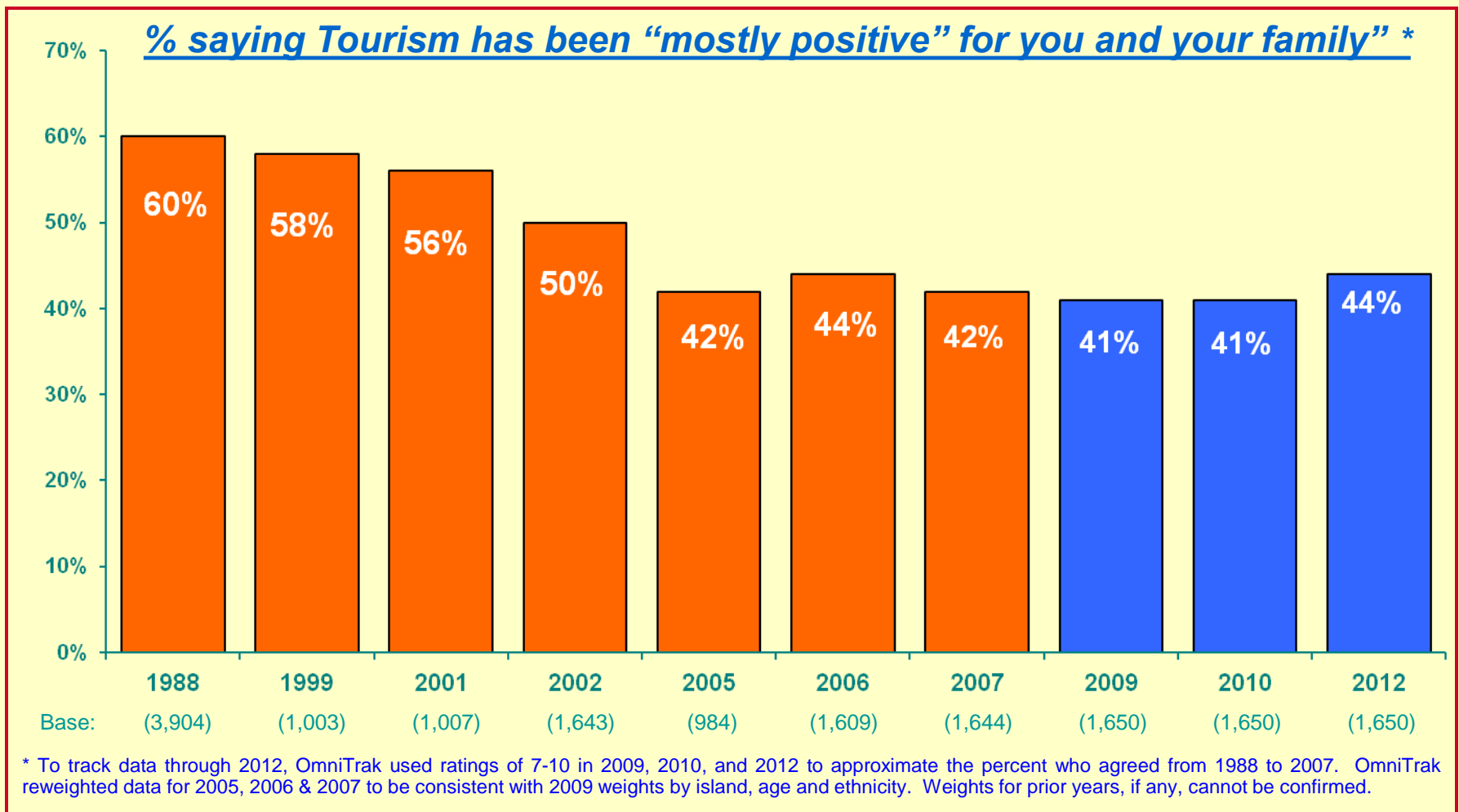
Top box ratings among households in the Visitor Industry is seven percentage points higher than those not affiliated with the industry.

Base: 390 Residents with a household member employed in Tourism; 1260 Households with no one employed in tourism.

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 the state as a whole?

# Positive Ratings of Impact of Tourism to Residents and their Families Remained Comparable from 2005 - 2009

Over two out of five Hawai'i residents say that Tourism has been mostly positive to them and their families: This percentage has remained comparable from 2005 to 2012.

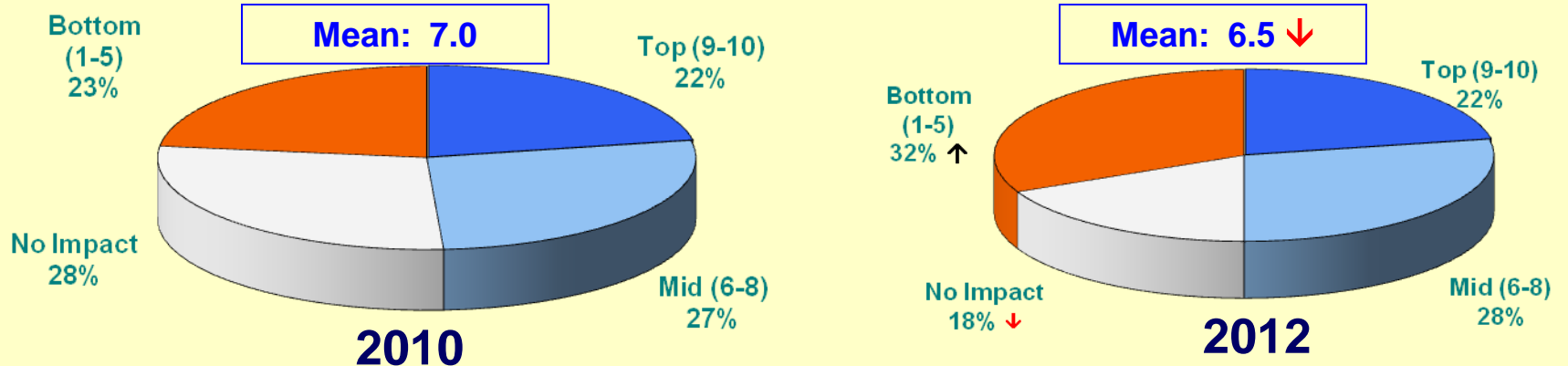


Q2b. Again using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact Tourism has on you and your family?

# More Residents Felt They Were Impacted by Tourism

There was also a significant decrease in the percentage of residents who thought Tourism had “No Impact” to themselves and their families. And nearly one third of all Hawai‘i residents rated Tourism negatively in this measure (Bottom Box), a significant increase from 2010. These changes resulted in a significant decrease in the average impacts. The most significant changes were on O‘ahu where Bottom Box ratings increased to 33 percent and those who thought it had “No Impact” decreased to 19 percent. Maui continued to feel that tourism impacts were positive.

*“Again using a 10-point scale where 10 is Extremely positive and 1 is Extremely negative, how would you rate the overall impact Tourism has on you and your family?”*



	O‘AHU		HAWAI‘I		MAUI		KAUA‘I	
	2010	2012	2010	2012	2010	2012	2010	2012
Top Box (9-10)	20%	20%	24%	17%	31%	39%	20%	22%
Mid Box (6-8)	28%	28%	24%	31%	24%	23%	29%	32%
Bottom Box (1-5)	23%	34% ↑	26%	32%	23%	24%	24%	33%
No Impact	30%	19% ↓	26%	21%	22%	15%	27%	12% ↓
<b>BASE</b>	<b>600</b>	<b>600</b>	<b>450</b>	<b>450</b>	<b>400</b>	<b>400</b>	<b>200</b>	<b>200</b>

Q2b. 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?

## Overall Impact of Tourism to Residents and their Families: By Specific Geography

On O‘ahu, the impact of Tourism to individuals and families is more positive in Urban Honolulu, Ewa/Leeward, and Central O‘ahu compared to Wai‘anae. In Maui County, Tourism impacts are more positive in West Maui compared to Central/East Maui or Moloka‘i.

“Overall Impact on you and your family”	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Top Box (9-10)	26%	14%	14%	12%	20%
Mid-Box (6-8)	26%	32%	17%	27%	32%
Bottom Box (1-5)	32%	29%	54%	44%	28%
No Impact	16%	24%	16%	16%	20%
MEAN	6.6	6.6	5.1	5.9	6.5
BASE	240	150	60	90	60

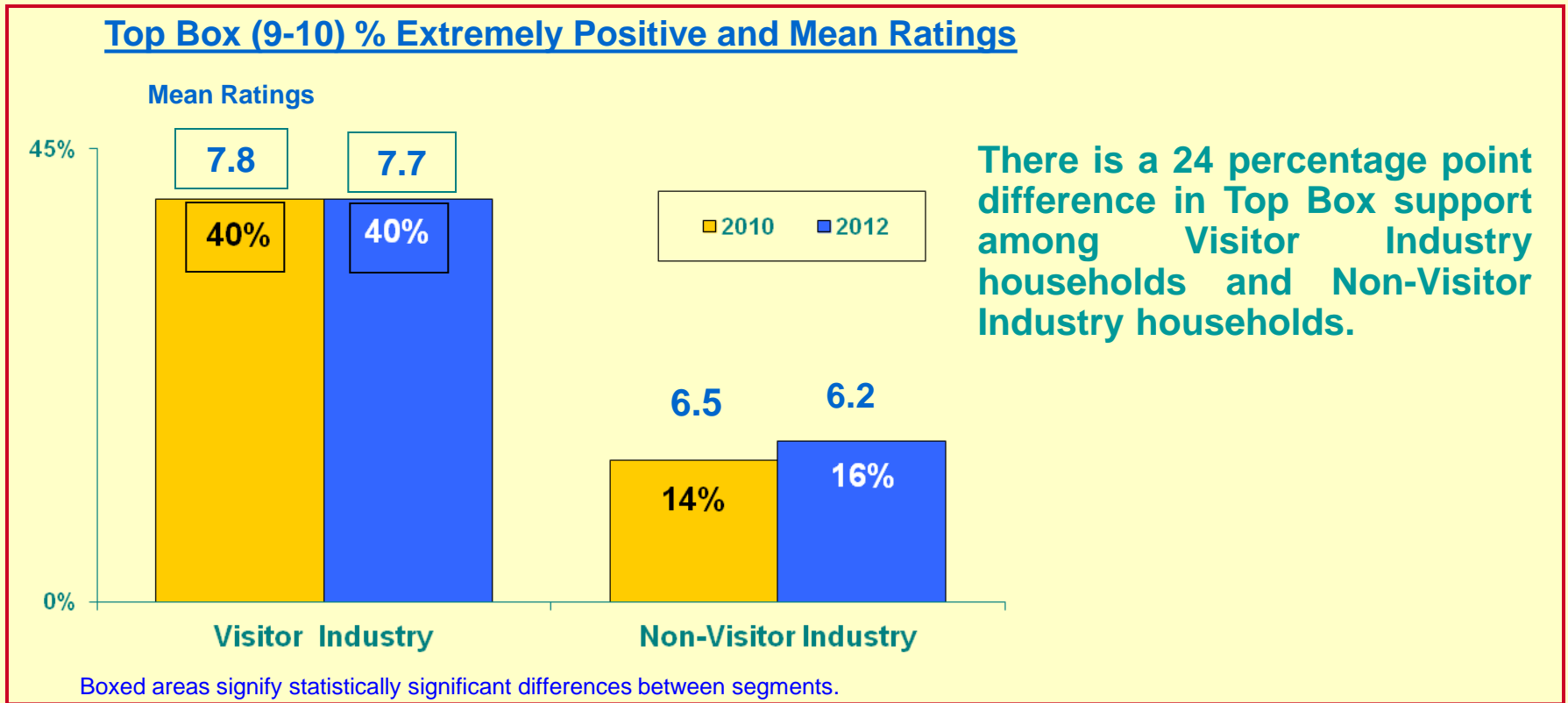
Shaded areas signify statistically significant differences between segments.

“Overall Impact on you and your family”	HAWAI‘I		MAUI				KAUA‘I
	West Hawai‘i	East Hawai‘i	West Maui	Central East Maui	Moloka‘i	Lana‘i	
Top Box (9-10)	22%	14%	49%	23%	7%	33%	22%
Mid-Box (6-8)	33%	28%	21%	25%	29%	37%	32%
Bottom Box (1-5)	27%	35%	20%	32%	30%	25%	33%
No Impact	17%	23%	10%	20%	34%	5%	12%
MEAN	6.6	6.3	8.0	6.8	6.1	7.3	6.6
BASE	225	225	100	175	75	50	200

Q2b. 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 to Residents and their Families: Visitor Industry vs. Non-Visitor Industry

In 2012, the overall impact of Tourism to individuals and families is perceived much more positively among households currently employed in the Visitor Industry than those who are not. This is consistent with 2010 findings.



Base: Residents with a household member employed in Tourism: 423 (2010) and 390 (2012); Households with no one employed in tourism: 1,202 (2010) and 1260 (2012).

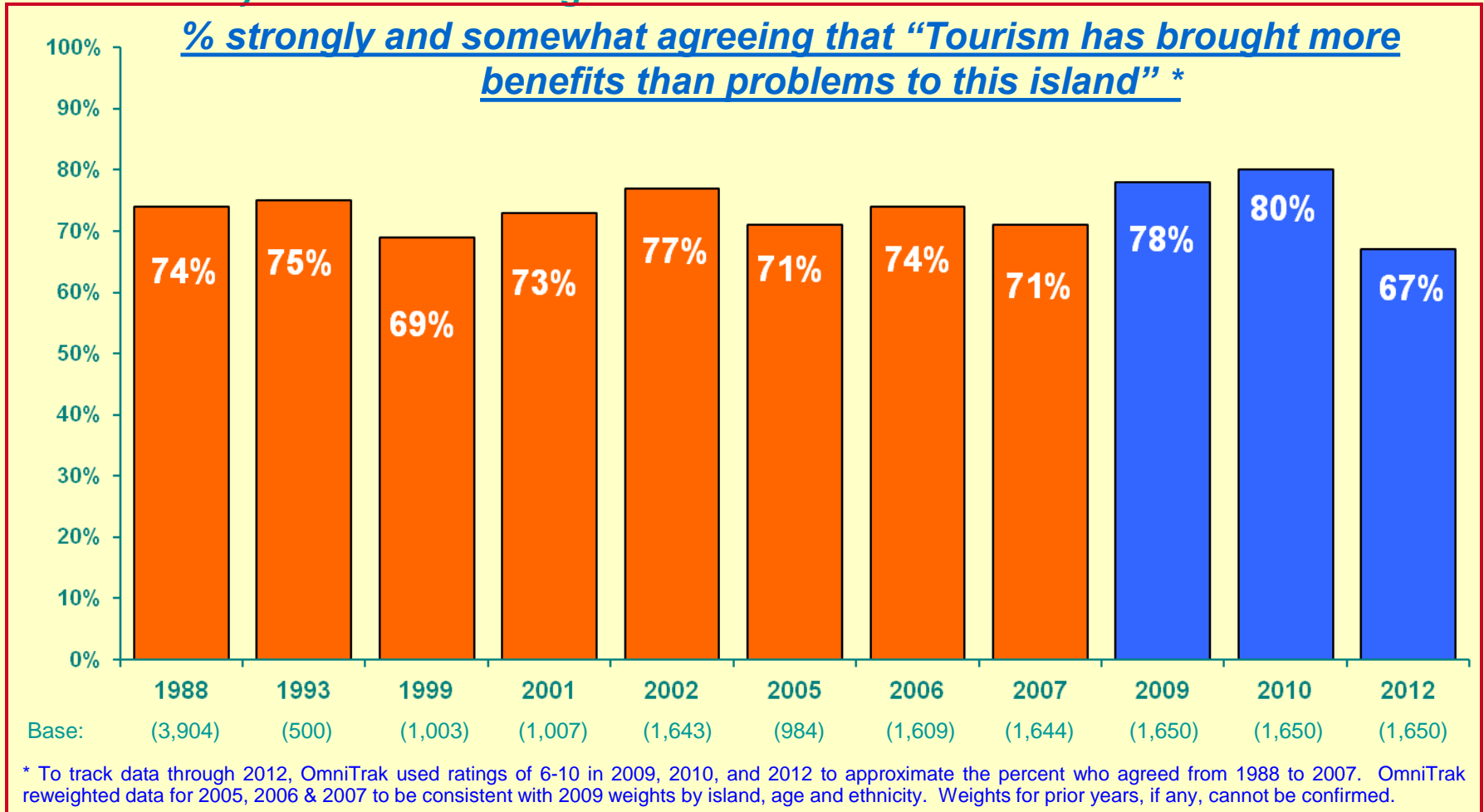
Q2b. Again using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact Tourism has on you and your family?

# Tracking Net Benefit Of Tourism



# Less Residents Agreed that Tourism was More Beneficial than Problematic

Agreement decreased from four out of five residents to two in three between 2010 and 2012, respectively. Criticism increases when economy improves: 1999, 2005-2007 and 2012 were all years of economic growth.

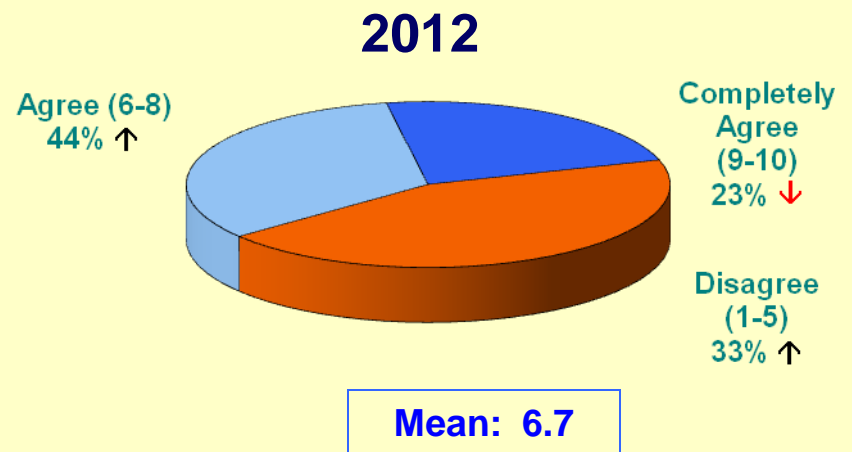
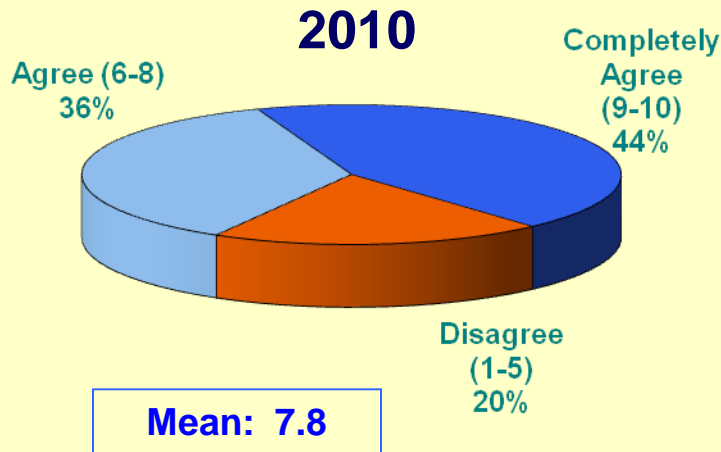


Q4.1: Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree that overall, Tourism has brought more benefits than problems to this island? \*In 2009, responses to the question changed from a choice of four responses to a 10-point scale where 10=completely agree and 1=do not agree at all.

# Net Benefit of Tourism: By Counties

In 2012, a lower percentage Hawai'i residents believed, "Tourism has brought more benefits than problems" compared to 2010. Residents who completely agree (9-10 ratings) declined from 44 in 2010 to 23 percent in 2012. Residents who disagreed with this statement increased from one in five to one in three between 2010 and 2012, respectively. Similar sentiment was express on all Counties.

*"Do you agree or disagree that Tourism has brought more benefits than problems to the State?"*



	O'AHU		HAWAI'I		MAUI		KAUA'I	
	2010	2012	2010	2012	2010	2012	2010	2012
Completely agree (9-10)	45%	23% ↓	44%	23% ↓	41%	26% ↓	42%	20% ↓
Agree (6-8)	37%	46% ↑	34%	36%	30%	40%	40%	37%
Disagree (1-5)	18%	31% ↑	23%	42% ↑	28%	34%	17%	42% ↑
Mean	7.9	6.8 ↓	7.7	6.4 ↓	7.3	6.8	7.8	6.3 ↓
Base	600	600	450	450	400	400	200	200

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 overall, Tourism has brought more benefits than problems to the State of Hawai'i?"

# Net Benefit of Tourism: By Specific Geography

On O‘ahu, Urban Honolulu residents gave slightly higher ratings for Tourism’s Net Benefit, while Windward residents gave slightly lower ratings. Neither rating, however was statistically significant and there were no significant differences across O‘ahu. Residents of Molok‘ai were significantly more likely to say that Tourism’s problems outweigh its benefits compared to other areas of Maui County.

<i>Net Benefit of Tourism</i>	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Top Box (9-10)	25%	24%	23%	16%	21%
Mid-Box (6-8)	46%	44%	35%	52%	51%
Bottom Box (1-5)	30%	32%	42%	32%	28%
MEAN	7.0	6.7	6.5	6.4	6.7
<i>BASE</i>	240	150	60	90	60

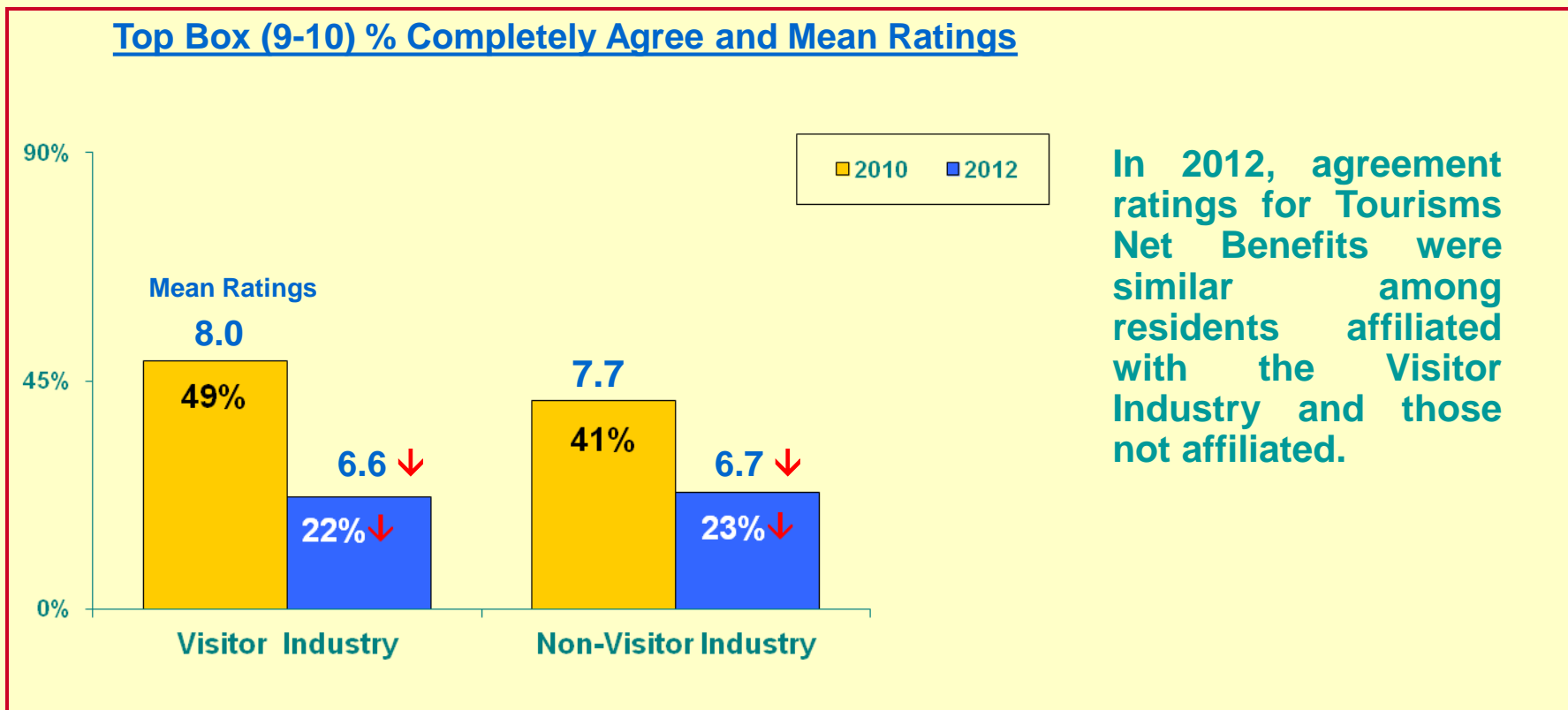
Shaded areas signify statistically significant differences between segments.

<i>Net Benefit of Tourism</i>	HAWAI‘I		MAUI				KAUA‘I
	West Hawai‘i	East Hawai‘i	West Maui	Central East Maui	Moloka‘i	Lana‘i	
Top Box (9-10)	24%	22%	28%	25%	13%	23%	20%
Mid-Box (6-8)	37%	35%	40%	39%	31%	54%	37%
Bottom Box (1-5)	39%	43%	32%	36%	56%	23%	42%
MEAN	6.6	6.3	7.0	6.6	5.6	7.2	6.3
<i>BASE</i>	225	225	100	175	75	50	200

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 overall, Tourism has brought more benefits than problems to the State of Hawai‘i?”

# Tourisms Net Benefits were similar among residents affiliated with the Visitor Industry and those not affiliated

Following the Statewide responses, completely agree ratings decreased significantly among both households affiliated with the Visitor Industry and those not affiliated.



Base: Residents with a household member employed in Tourism: 423 (2010) and 390 (2012); Households with no one employed in tourism: 1,202 (2010) and 1260 (2012).

Q4.1 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: Perceptions of Tourism

# Six Statements About Tourism

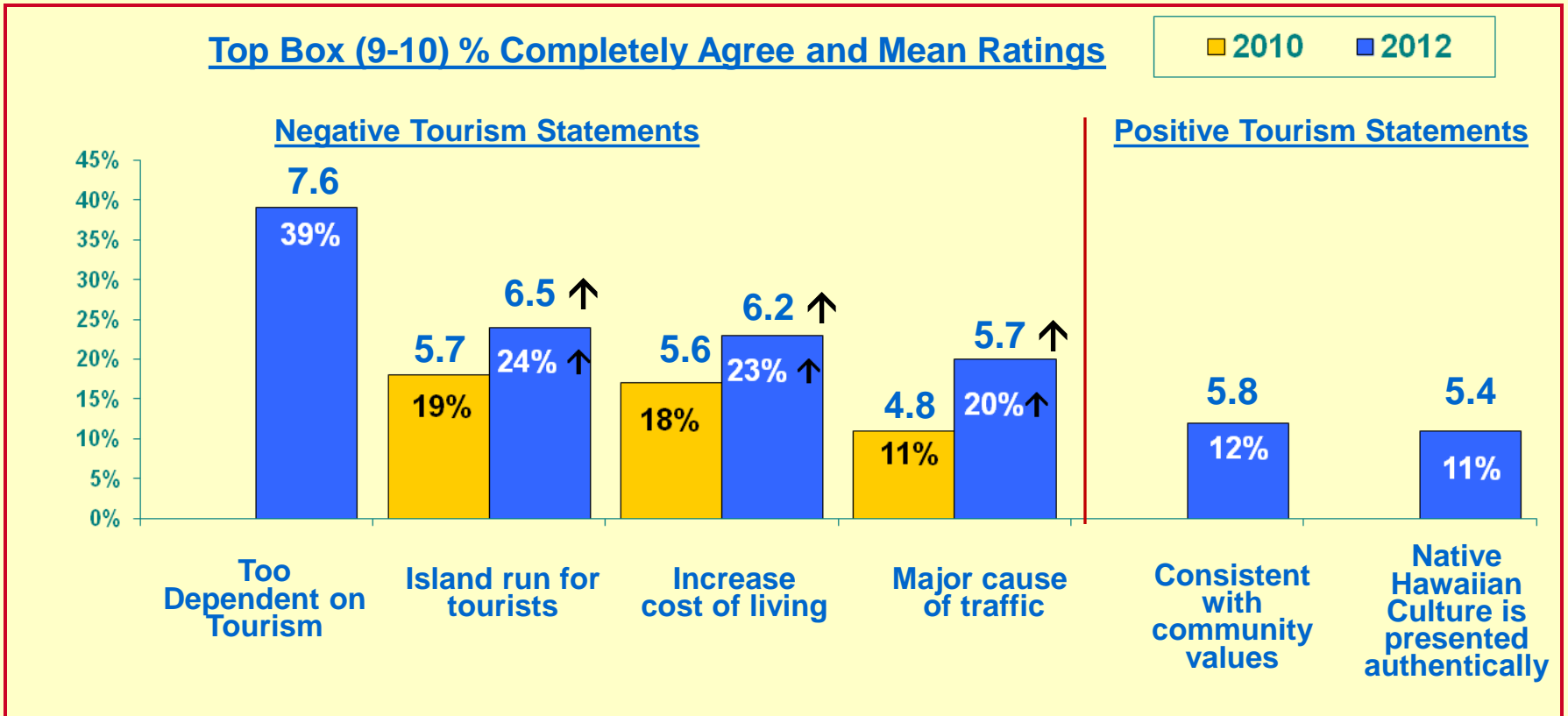
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“Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that \_\_\_\_\_”

- *This island is being run for tourists at the expense of local people*
- *Tourism is the major cause of traffic*
- *Tourism is most responsible for Hawai‘i’s high cost of living*
- **ADDED IN 2012:** *My island’s economy is too dependent on Tourism*
- **ADDED IN 2012:** *Tourism currently presents Native Hawaiian culture in an authentic manner*
- **ADDED IN 2012:** *Tourism is consistent with community values of this island*

# Perception that Tourism has Negative Externalities Increased

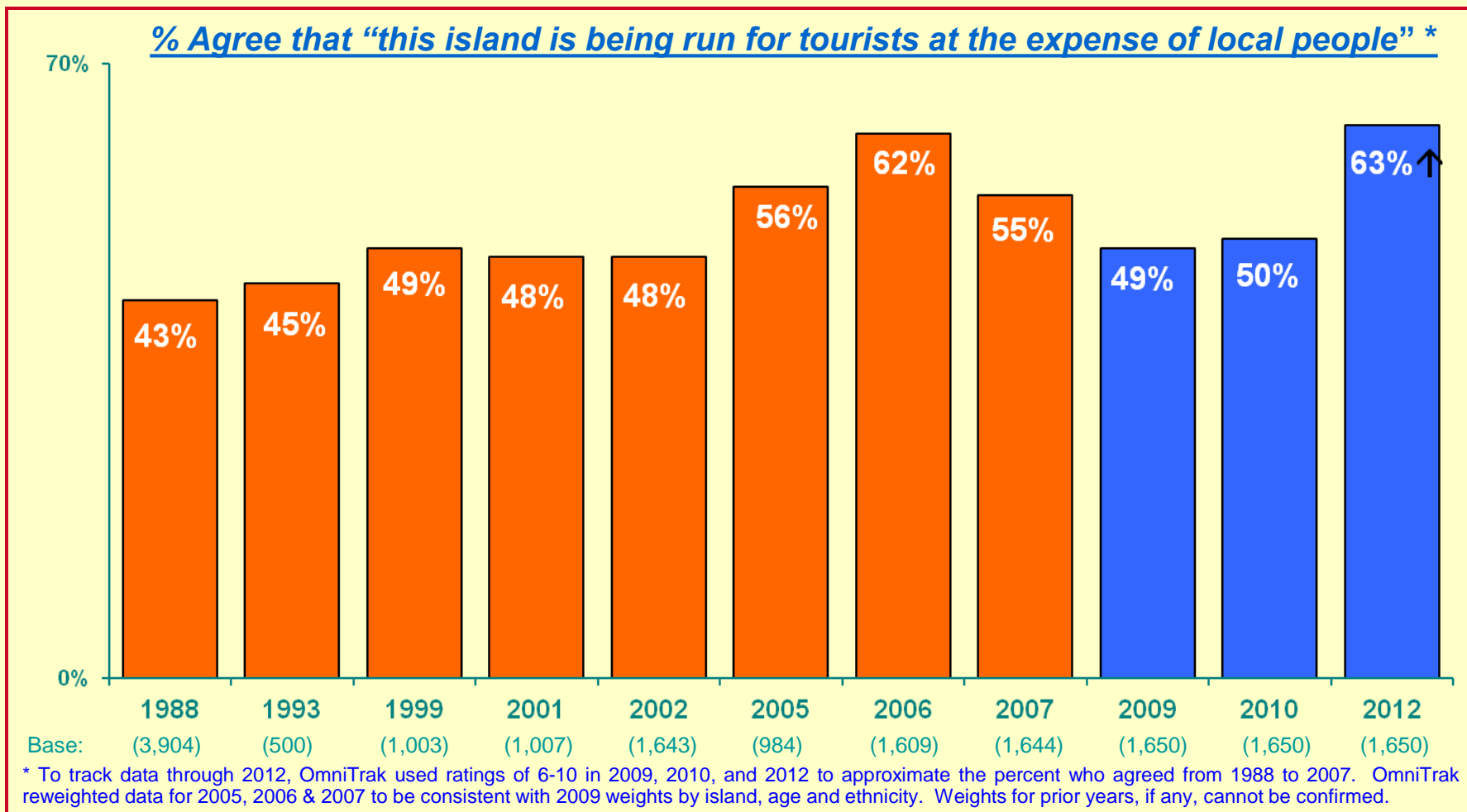
Top Box and mean agreement increased significantly among the three negative statements: (1) “My island is run for tourists,” (2) “Tourism increases the cost of living,” and (3) “Tourism is a major cause of traffic.” Positive statements, newly added in 2012, “Native Hawaiian culture is presented authentically” and “Tourism is consistent with community values” had lower levels of agreement. Also newly added in 2012, “My island is too dependent on Tourism” had the highest level of agreement with nearly two in five (39%) rating this in the Top Box.



Base: 1,650 statewide residents each in 2010 and 2012. \*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 “Island Being Run For Tourists”: 1988 to 2012

Agreement that Tourism is run at the expense of residents increased significantly in 2012 to 63 percent of all residents. Again, more critical ratings are experienced during stronger economic times (1999, 2005-2007, 2012).



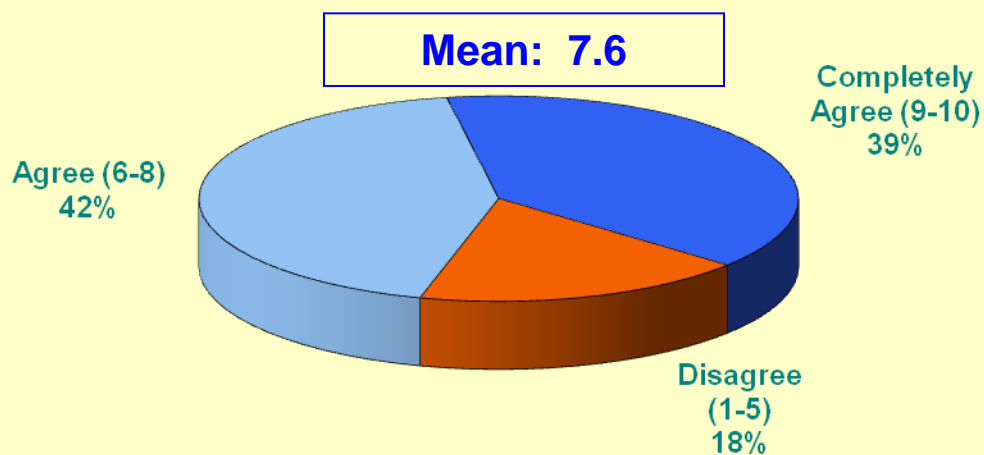
Q4.2. “Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree At All, how much do you agree or disagree that this island is being run for tourists at the expense of local people?” In 2009, responses to the question changed from a choice of four responses to a 10-point scale where 10=Completely Agree and 1=Do Not Agree At All.



# Too Dependent on Tourism

Statewide, nearly two out of five residents (39%) completely agree that their island is too dependent on Tourism. This rating was highest in Maui County, where 44 percent of residents completely agree. Residents of Hawai'i County show the highest percentage of disagreement with the statement.

*“How much do you agree or disagree that My island’s economy is too dependent on Tourism?”*



	O’AHU	HAWAI’I	MAUI	KAUA’I
Top Box (9-10)	39%	35%	44%	43%
Mid Box (6-8)	44%	39%	40%	40%
Bottom Box (1-5)	17%	27%	16%	17%
Mean	7.6	7.2	7.8	7.8

Base: 1,650 statewide residents in 2012.

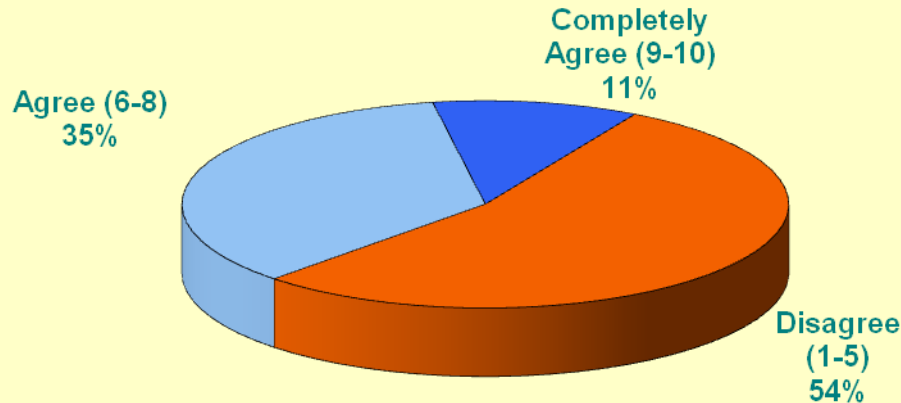
Q4.5 “Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree At All, how much do you agree or disagree that my island’s economy is too dependent on Tourism?”

# Native Hawaiian Culture is Presented Authentically (New in 2012)

Statewide, around one in ten residents (11%) completely agree that Native Hawaiian culture is presented authentically, while slightly over half (52%) disagree. These findings are consistent across the State, with more Kaua'i residents disagreeing with the statement compared to residents on other islands.

*“How much do you agree or disagree that Tourism currently presents Native Hawaiian culture in an authentic manner?”*

**Mean: 5.4**



	O'AHU	HAWAI'I	MAUI	KAUA'I
Top Box (9-10)	11%	14%	10%	9%
Mid Box (6-8)	35%	34%	38%	33%
Bottom Box (1-5)	54%	51%	52%	57%
Mean	5.4	5.5	5.6	5.2

Base: 1,650 statewide residents in 2010.

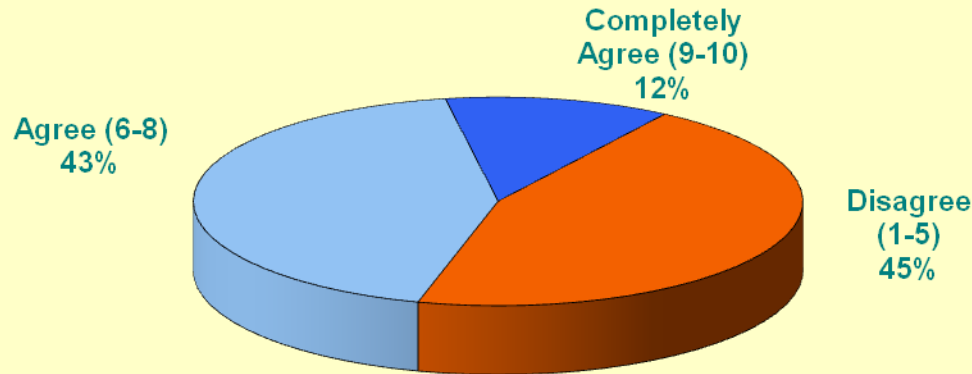
Q4.6 “Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree At All, how much do you agree or disagree that Tourism currently presents Native Hawaiian culture in an authentic manner?”

# Consistent with Community Values (New in 2012)

Statewide, over two out of five residents (45%) disagree that “Tourism is consistent with the community values on their island” while one in eight completely agree with this statement. On the County level, agreement for this statement was consistent throughout the State with Kaua’i residents disagreeing slightly more than residents of other islands.

“How much do you agree or disagree that Tourism is consistent with community values on this island?”

Mean: 5.8



	O’AHU	HAWAI’I	MAUI	KAUA’I
Top Box (9-10)	12%	12%	16%	12%
Mid Box (6-8)	44%	37%	44%	36%
Bottom Box (1-5)	44%	51%	40%	52%
Mean	5.8	5.7	6.1	5.5

Base: 1,650 statewide residents in 2012.

Q4.7 “Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree At All, how much do you agree or disagree that Tourism is consistent with community values on this island?”

# Tracking Statements About Tourism: ‘Top Box’ % By County

Resident agreement was consistently high across the state regarding the statement, “My island’s economy is too dependent on Tourism.” Top Box agreement among the positive statements, “Presents Native Hawaiian culture authentically” and “Consistent with community values” were consistently low across the state.

Top Box agreement with “Tourism as a major cause of traffic” increased significantly for residents of O’ahu and Kaua’i. O’ahu residents Top Box agreement also increased significantly with “Tourism as responsible for high living costs.” On Hawai’i island, residents had significant Top Box increases in the statement my island is being run for tourists. Maui residents appear to be more negative towards Tourism statements compared to O’ahu or Hawai’i Island residents.

Top Box %: Agreement that Tourism...	O’AHU		HAWAI’I		MAUI		KAUA’I	
	2010	2012	2010	2012	2010	2012	2010	2012
<i>...My Island’s economy is too dependent on Tourism (NEW)</i>	--	39%	--	34%	--	44%	--	43%
<i>...this island is being run for tourists</i>	18%	23%	12%	22%↑	29%	33%	21%	30%
<i>...is responsible for higher living costs</i>	16%	22%↑	16%	20%	32%	31%	19%	28%
<i>... is a major cause of traffic</i>	7%	16%↑	16%	22%	26%	34%	17%	34%↑
<i>... Presents Native Hawaiian culture authentically (NEW)</i>	--	10%	--	14%	--	10%	--	9%
<i>... Consistent with community values (NEW)</i>	--	11%	--	12%	--	16%	--	12%
<b>BASE</b>	<b>600</b>	<b>600</b>	<b>450</b>	<b>450</b>	<b>400</b>	<b>400</b>	<b>200</b>	<b>200</b>

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.

# Statements About Tourism: ‘Top Box’ % By Specific Geography (1 of 2)

On O‘ahu, Wai‘anae residents gave significantly higher Top box agreement ratings with “My Island is Being Run for Tourists” compared to other areas of the island. Residents of Ewa/Leeward were significantly more likely to agree with the statement “Tourism is a Major Cause of Traffic.”

<i>Net Benefit of Tourism</i>	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
<i>...My Island’s economy is too dependent on Tourism</i>	38%	39%	43%	39%	42%
<i>...this island is being run for tourists</i>	24%	28%	34%	16%	21%
<i>...is responsible for higher living costs</i>	20%	27%	25%	17%	29%
<i>... is a major cause of traffic</i>	14%	23%	19%	8%	18%
<i>... Presents Native Hawaiian culture authentically</i>	9%	12%	11%	10%	14%
<i>... Consistent with community values</i>	10%	14%	12%	9%	18%
<b>BASE</b>	<b>240</b>	<b>150</b>	<b>60</b>	<b>90</b>	<b>60</b>

Shaded areas signify statistically significant differences between segments.

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.

# Statements About Tourism: ‘Top Box’ % By Specific Geography (2 of 2)

Among Hawai‘i Island residents, West Hawai‘i residents reported significantly higher ratings for “Tourism as a Major Cause of Traffic” compared to the rest of the island, while in Maui County, residents of Moloka‘i reported significantly lower Top box agreement ratings with the statements “My Island is Too Dependent on Tourism” and “This Island is Being Run for Tourists” compared to other parts of the county. Furthermore, Moloka‘i residents gave the lowest Top box agreement with the statements, “Presents Native Hawaiian Culture Authentically” and “Consistent with Community Values” compared to any other part of the State.

<i>Net Benefit of Tourism</i>	HAWAI‘I		MAUI				KAUA‘I
	West Hawai‘i	East Hawai‘i	West Maui	Central East Maui	Moloka‘i	Lana‘i	
<i>...My Island’s economy is too dependent on Tourism</i>	40%	31%	43%	50%	23%	51%	43%
<i>...this island is being run for tourists</i>	27%	19%	35%	36%	14%	29%	30%
<i>...is responsible for higher living costs</i>	23%	19%	33%	33%	22%	28%	28%
<i>... is a major cause of traffic</i>	28%	18%	35%	36%	21%	20%	34%
<i>... Presents Native Hawaiian culture authentically</i>	12%	16%	11%	9%	1%	14%	9%
<i>... Consistent with community values</i>	15%	10%	17%	15%	5%	11%	12%
<b>BASE</b>	<b>225</b>	<b>225</b>	<b>100</b>	<b>175</b>	<b>75</b>	<b>50</b>	<b>200</b>

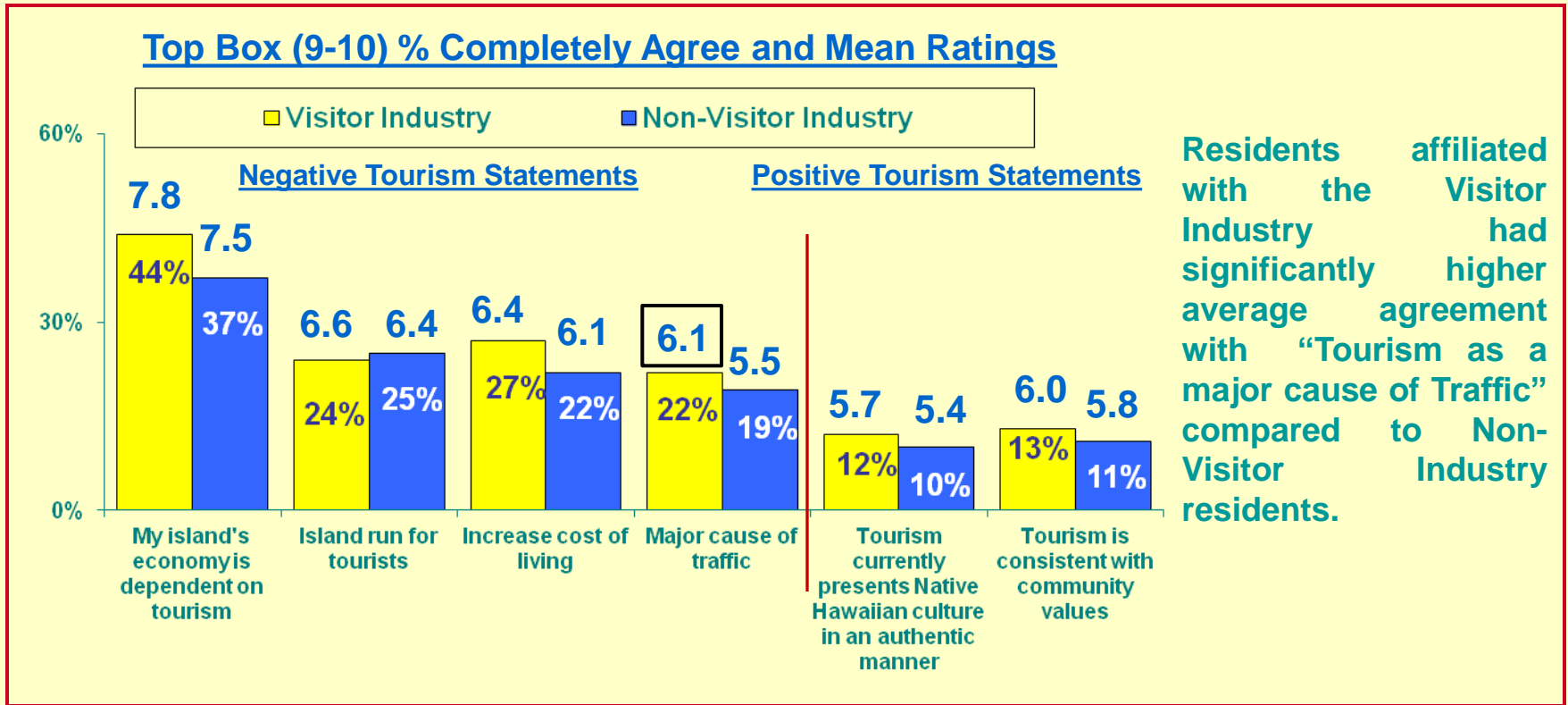
Shaded areas signify statistically significant differences between segments.

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.

# Statements About Tourism: Visitor Industry vs. Non-Visitor Industry

Agreement with the six statements on Tourism is similar between residents affiliated with the Visitor Industry and those not affiliated with the industry. The statement that showed a statistically significant difference was “Tourism is a Major Cause of Traffic,” where households affiliated with the industry reported higher mean agreement than those not affiliated with the industry. Both groups had the highest agreement with “My Island’s Economy is too Dependent on Tourism.”

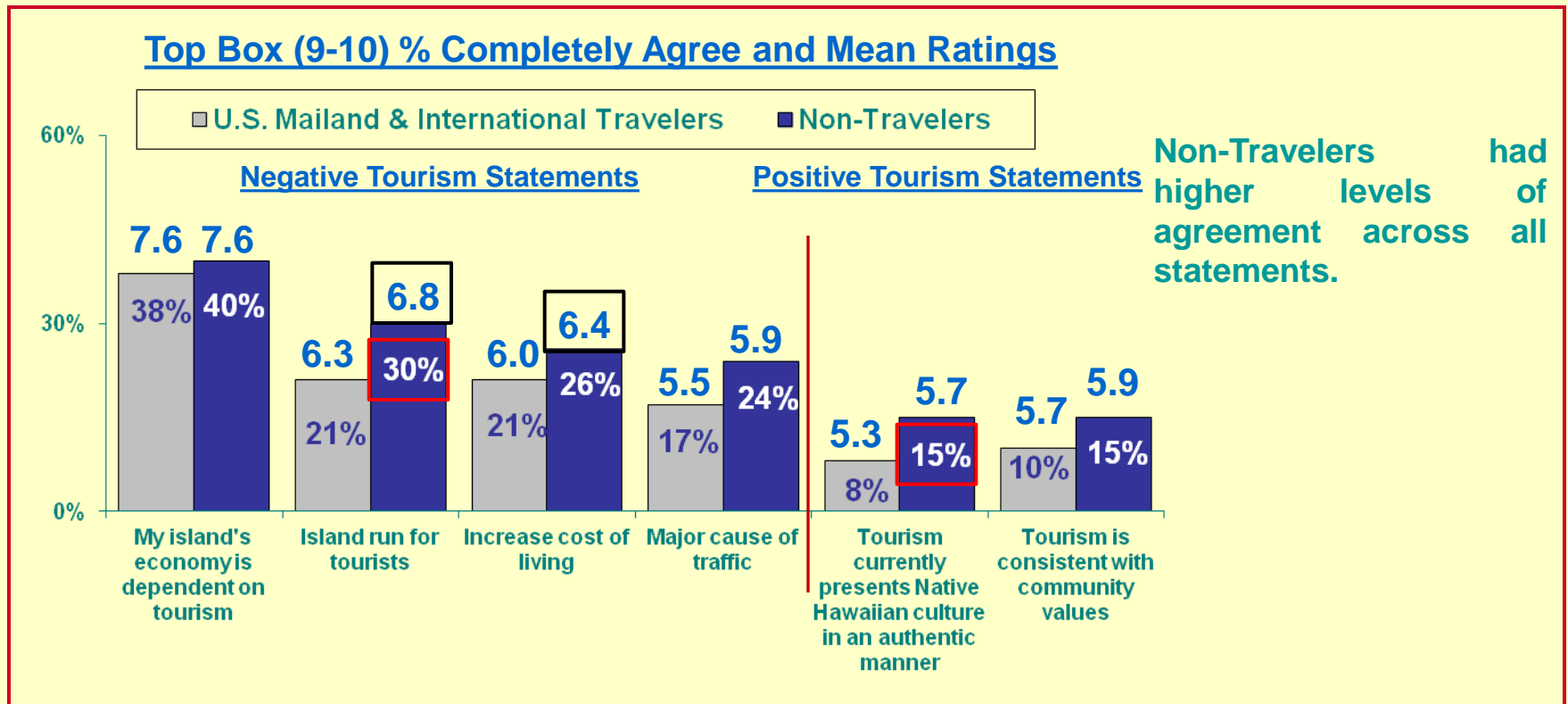


Base: Residents with a household member employed in Tourism: 390 (2012); Households with no one employed in tourism: 1260 (2012).

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...”

# Non-Travelers More Likely to Be Critical

Residents who did not travel to the US mainland or internationally were more likely to agree with negative tourism statements but also had a more positive perception of Hawai'i's Tourism image. Top Box agreement was significantly higher for non-travelers in the statements that "My island is run for Tourists," "Tourism increases the cost of living," and "Presents Native Hawaiian culture authentically."



Bases: 971 residents who traveled or plan to travel to the US mainland or to international destinations in 2012, and 679 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..."



# Visitor Industry Involvement in Quality of Life

# Visitor Industry Involvement Areas: Importance

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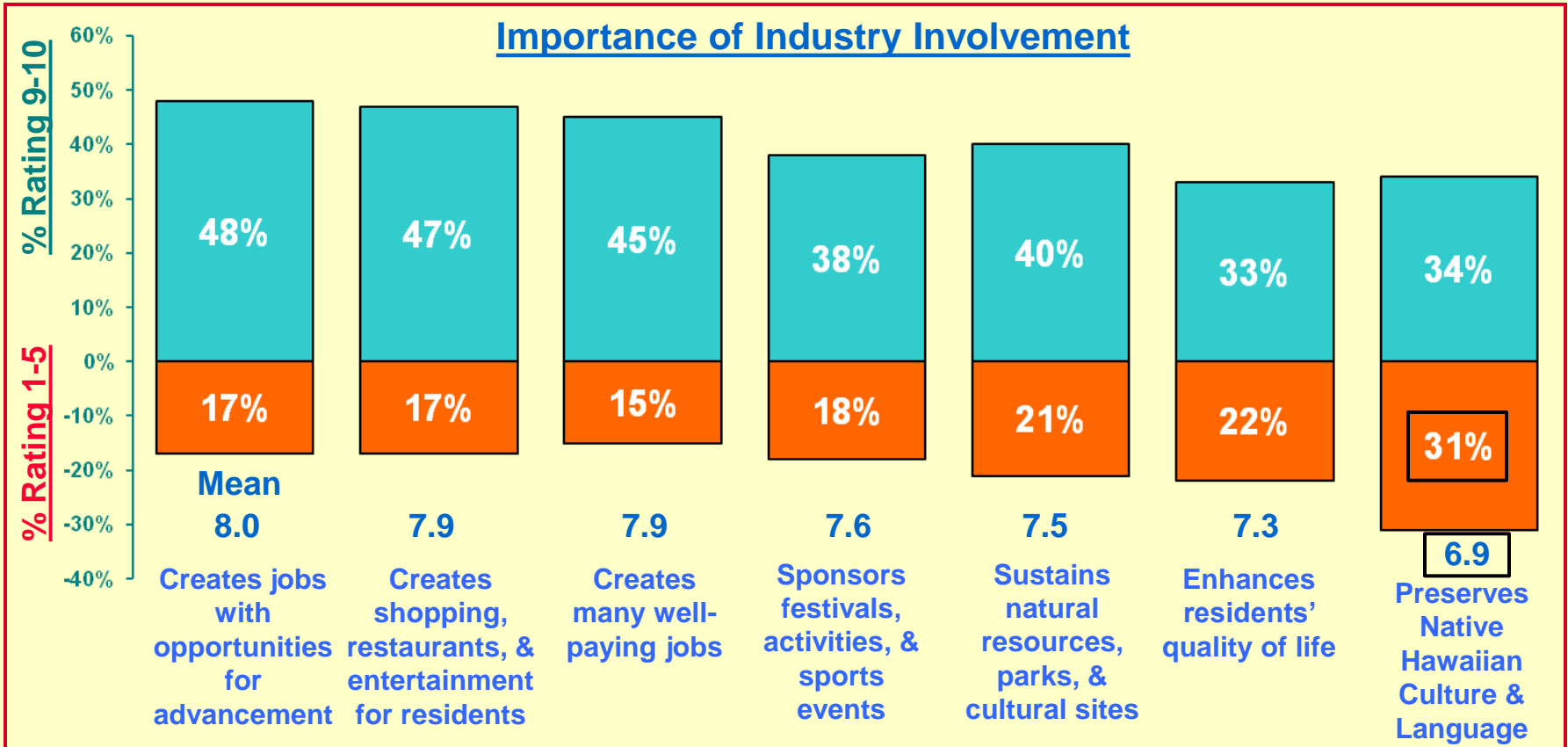
New in 2012, respondents were asked to rate the importance of seven visitor industry related attributes.

*“I’m going to read you some ways tourism may affect your island and for each, please rate its importance on a scale of 1 to 10 with 10 being Extremely Important, and 1 being Not Important at All.”*

- Creates many well paying jobs
- Creates shopping, restaurants, and entertainment opportunities for residents
- Creates jobs that have opportunities for advancement
- Helps to preserve Native Hawaiian culture and language
- Helps sustain Hawai‘i’s natural resources, parks, and cultural sites
- Is an industry that enhances residents’ quality of life
- Sponsors festivals, activities, and sports events for residents and visitors

# Importance of Industry Involvement: Statewide

Statewide, residents place the highest level of importance on “Creating jobs with opportunities for advancement” and “Shopping/entertainment for residents.” The least important aspect is “Preserving Native Hawaiian culture” where slightly more than a third believe it is Extremely Important (34%) and less than one-third believe it is not important (31%).



Base: 1,650 statewide residents in 2012.

Q3a. “Using a 10-point scale where 10 means Extremely Important and 1 means Not Important At All, how important is it that Tourism...?”

# Importance of Industry Involvement: By County

Comparison by counties show that more than half of all residents on Maui and Kaua'i believe it is extremely important (9-10 rating) that tourism "Creates well paying jobs." Residents on Maui also emphasize on "Creating jobs with opportunities for advancement" and the industry to "Enhance residents' quality of life." While on O'ahu and Hawai'i Island, "Creating shopping/entertainment" had the most important industry involvement.

Shaded areas signify statistically significant differences between segments.

<i>Top Box Ratings 9-10 %: Importance of Industry</i>	O'AHU	HAWAI'I	MAUI	KAUA'I
Creates jobs with opportunities for advancement	48%	42%	57%	49%
Creates shopping, restaurants, and entertainment opportunities for residents	49%	43%	48%	41%
Creates many, well paying jobs	44%	40%	55%	52%
Sponsors festivals, activities, & sports events for residents & visitors	38%	36%	40%	37%
Helps sustain Hawai'i's natural resources, parks, and cultural sites	40%	38%	41%	38%
Is an industry that enhances residents' quality of life	31%	33%	44%	39%
Helps preserve Native Hawaiian culture and language	33%	36%	39%	39%
<b>BASE</b>	<b>600</b>	<b>450</b>	<b>400</b>	<b>200</b>

Q3a. "Using a 10-point scale where 10 means Extremely Important and 1 means Not important at all, how important is it that tourism...?" Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

# Importance of Industry Involvement: By Specific Geography (1 of 2)

On O‘ahu, residents in Urban Honolulu and Ewa/Leeward placed a higher level of importance on the industry’s role in “Creating jobs with opportunities for advancement” compared to other areas on O‘ahu. Central O‘ahu residents placed a higher level of importance on “Preserving Native Hawaiian culture.”

Shaded areas signify statistically significant differences between segments.

Ratings 9-10 %: Importance of Industry	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Creates jobs with opportunities for advancement	50%	55%	43%	33%	44%
Creates shopping, restaurants, and entertainment opportunities for residents	50%	56%	46%	39%	42%
Creates many well paying jobs	50%	45%	37%	32%	40%
Sponsors festivals, activities, & sports events for residents & visitors	43%	41%	30%	25%	34%
Helps sustain Hawai‘i’s natural resources, parks, and cultural sites	43%	41%	29%	34%	40%
Is an industry that enhances residents’ quality of life	28%	36%	31%	32%	33%
Helps preserve Native Hawaiian culture and language	35%	35%	31%	22%	40%
<b>BASE</b>	<b>240</b>	<b>150</b>	<b>60</b>	<b>90</b>	<b>60</b>

Q3a. “Using a 10-point scale where 10 means Extremely Important and 1 means Not important at all, how important is it that Tourism...?”

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

## Importance of Industry Involvement: By Specific Geography (2 of 2)

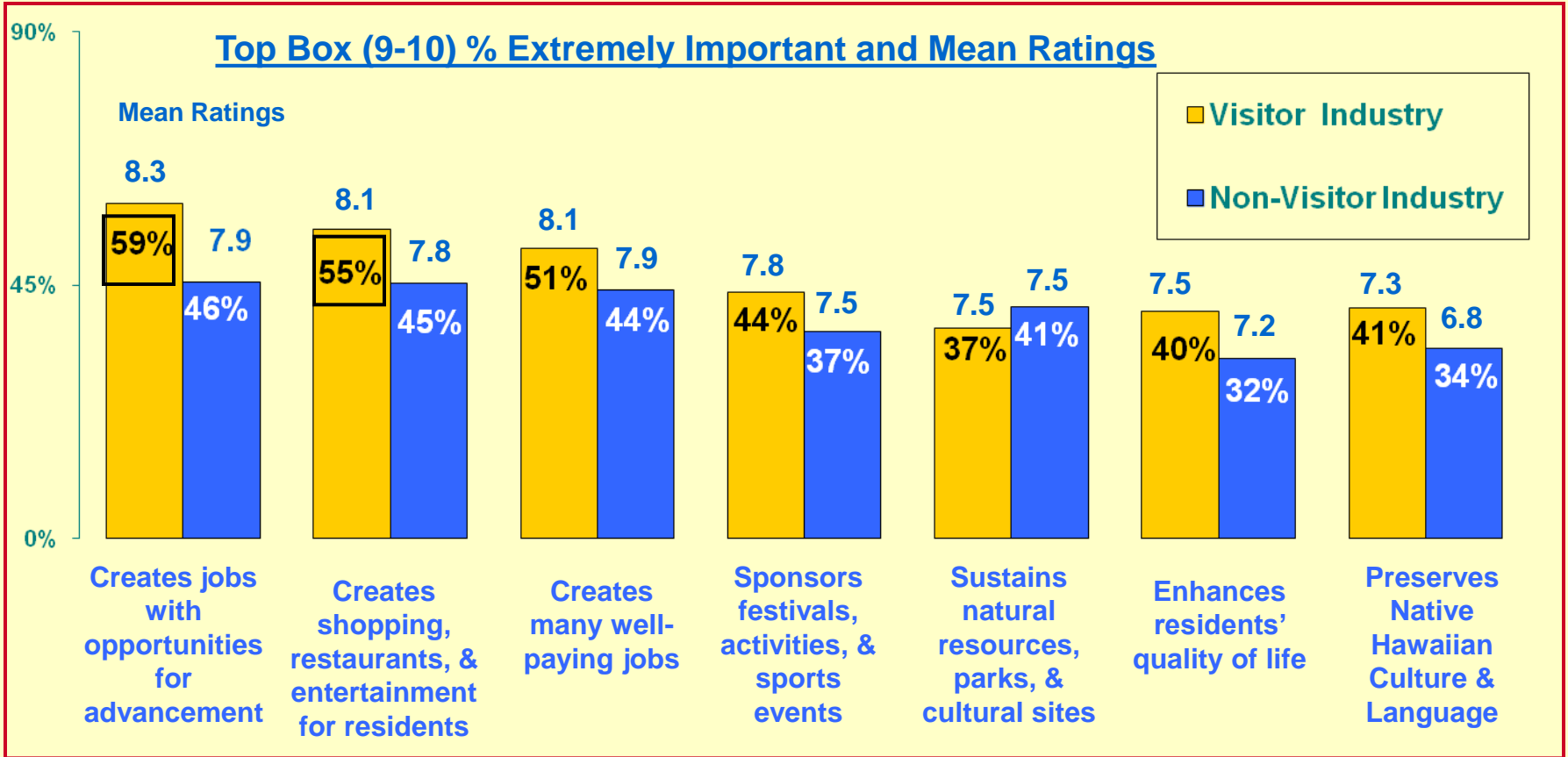
Maui island residents placed the highest level of importance on the industry's role in "Creating shopping opportunities," "Creating well paying jobs," and "Enhancing quality of life" compared to Moloka'i or Lana'i residents. West Maui residents also rated "Creating jobs with opportunities for advancement" and "Sponsoring festivals and events" higher than other areas in the county. There were no statistically significant differences in importance among Hawai'i island residents.

Ratings 9-10 %: Importance of Industry	HAWAI'I		MAUI				KAUA'I
	West Hawai'i	East Hawai'i	West Maui	Central East Maui	Moloka'i	Lana'i	
Creates jobs with opportunities for advancement	43%	41%	64%	48%	36%	48%	49%
Creates shopping, restaurants, and entertainment opportunities for residents	42%	43%	50%	49%	29%	32%	41%
Creates many well paying jobs	41%	40%	59%	52%	37%	26%	52%
Sponsors festivals, activities, & sports events for residents & visitors	37%	36%	46%	31%	26%	32%	37%
Helps sustain Hawai'i's natural resources, parks, and cultural sites	36%	39%	40%	45%	37%	34%	38%
Is an industry that enhances residents' quality of life	30%	35%	48%	41%	18%	25%	39%
Helps preserve Native Hawaiian culture and language	37%	35%	42%	33%	32%	23%	39%
<b>BASE</b>	<b>225</b>	<b>225</b>	<b>100</b>	<b>175</b>	<b>75</b>	<b>50</b>	<b>200</b>

Q3a. "Using a 10-point scale where 10 means Extremely Important and 1 means Not important at all, how important is it that Tourism...?" Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

# Importance of Industry Involvement : Visitor Industry vs. Non-Visitor Industry

Residents affiliated with the visitor industry gave higher Top box importance ratings among all industry involvement attributes except for “Sustaining natural resources.” Importance ratings were significantly higher among those in the Visitor Industry in “Creating jobs with opportunities for advancement” and “Creating shopping and entertainment opportunities.”

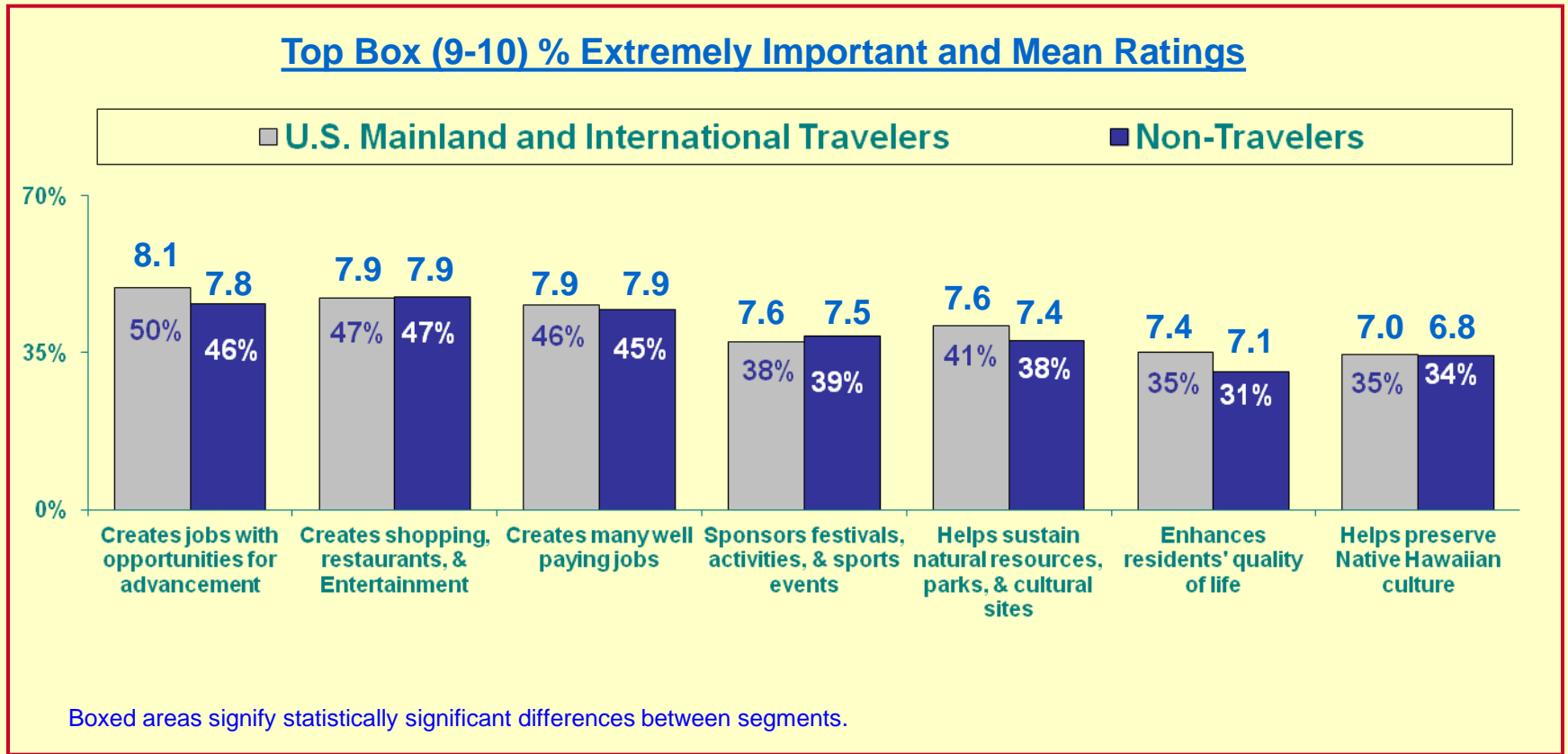


Base: Residents with a household member employed in Tourism: 423 (2010) and 390 (2012); Households with no one employed in tourism: 1,202 (2010) and 1260 (2012).

Q3a. “Using a 10-point scale where 10 means Extremely Important and 1 means Not important at all, how important is it that Tourism...?”

# Importance of Industry Involvement: Travelers vs. Non-Travelers

There were no statistically significant differences between Travelers to the US mainland/international and Non-Travelers across industry importance. Travelers were slightly more likely to place a higher level of importance on 5 of the 7 attributes.



Bases: 957 residents who traveled to the US mainland or to International destinations, and 693 who did not.

Q3a. "Using a 10-point scale where 10 means Extremely Important and 1 means Not important at all, how important is it that Tourism...?"



# Visitor Industry Involvement Areas: Satisfaction

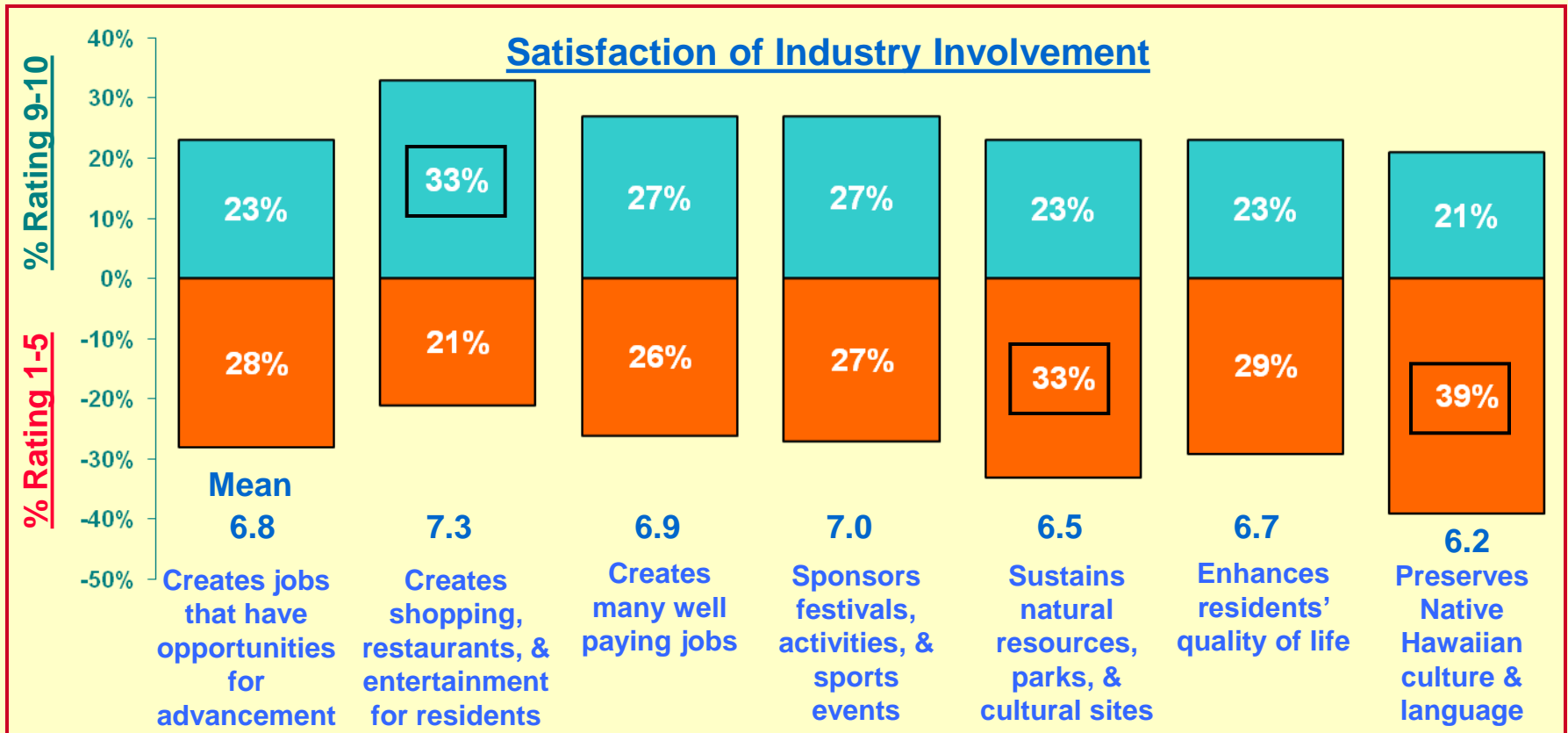
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*“Using a 10-point scale where 10 means Extremely Satisfied and 1 means Not Satisfied At All, how satisfied are you overall that the Visitor Industry....[INSERT]?”*

- Creates many well paying jobs
- Creates shopping, restaurants, and entertainment opportunities for residents
- Creates jobs that have opportunities for advancement
- Helps to preserve Native Hawaiian culture and language
- Helps sustain Hawai‘i’s natural resources, parks, and cultural sites
- Is an industry that enhances residents’ quality of life
- Sponsors festivals, activities, and sports events for residents and visitors

# 2012 Satisfaction With Industry Involvement: Statewide

Residents have the highest satisfaction with “Creating shopping/entertainment” with one-third of all residents extremely satisfied with industry involvement. Residents also satisfied that the Tourism Industry Sponsored festivals/events and created many well paying jobs. Residents were least satisfied with “Preserving Native Hawaiian culture”; however, this attribute was also the lowest in importance.



Base: 1,650 statewide residents in 2012.

Q3b. “Using a 10-point scale where 10 means Extremely Satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”

# 2012 Satisfaction With Industry Involvement: By County

In 2012, Maui residents had significantly higher Top Box satisfaction ratings with Tourism’s role in “Creating well paying jobs,” “Creating jobs with opportunities for advancement,” and “Enhancing quality of life” compared to other areas. “Creating shopping/entertainment” was rated significantly higher on O’ahu and Maui compared to Hawai’i Island or Kaua’i. There were no significant differences in “Sustaining Hawai’i’s natural resources” or “Preserving Native Hawaiian culture” across Counties.

<i>Ratings 9-10 %: Satisfaction with Industry</i>	O’AHU	HAWAI’I	MAUI	KAUA’I
Creates jobs with opportunities for advancement	22%	24%	35%	25%
Creates shopping, restaurants, and entertainment opportunities for residents	35%	26%	37%	20%
Creates many well paying jobs	27%	26%	37%	24%
Sponsors festivals, activities, & sports events for residents & visitors	28%	24%	32%	22%
Helps sustain Hawai’i’s natural resources, parks, and cultural sites	23%	22%	29%	19%
Is an industry that enhances residents’ quality of life	23%	21%	32%	24%
Helps preserve Native Hawaiian culture and language	22%	18%	25%	19%
<b>BASE</b>	<b>600</b>	<b>450</b>	<b>400</b>	<b>200</b>

Q3b. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”

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

# Satisfaction of Industry Involvement: By Specific Geography (1 of 2)

Residents on Windward O‘ahu were least satisfied with industry involvement in “Creating shopping opportunities,” “Sponsoring festivals,” “Creating jobs with opportunities for advancement,” and “Enhancing quality of life” compared to other parts of the island. Wai‘anae residents were least satisfied with industry involvement with “Sustaining natural resources” and “Helping to preserve Native Hawaiian culture.”

Shaded areas signify statistically significant differences between segments.

Ratings 9-10 %: Satisfaction with Industry	O‘AHU				
	Urban Honolulu	Ewa, Leeward	Wai‘anae	Windward	Central
Creates jobs with opportunities for advancement	20%	27%	29%	14%	24%
Creates shopping, restaurants, and entertainment opportunities for residents	38%	36%	28%	24%	32%
Creates many well paying jobs	27%	28%	28%	17%	32%
Sponsors festivals, activities, & sports events for residents & visitors	28%	30%	24%	18%	35%
Helps sustain Hawai‘i’s natural resources, parks, and cultural sites	22%	26%	13%	18%	26%
Is an industry that enhances residents’ quality of life	24%	26%	24%	13%	24%
Helps preserve Native Hawaiian culture and language	23%	23%	11%	18%	21%
<b>BASE</b>	<b>240</b>	<b>149</b>	<b>60</b>	<b>90</b>	<b>60</b>

Q3b. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”

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

# Satisfaction of Industry Involvement: By Specific Geography (2 of 2)

Compared to other Maui County residents, residents of Moloka'i were least satisfied in industry involvement in "Sponsoring festivals and events," "Creating many well paying jobs," "Sustaining natural resources," and "Preserving Native Hawaiian culture." There were no statistically significant differences across Hawai'i Island residents.

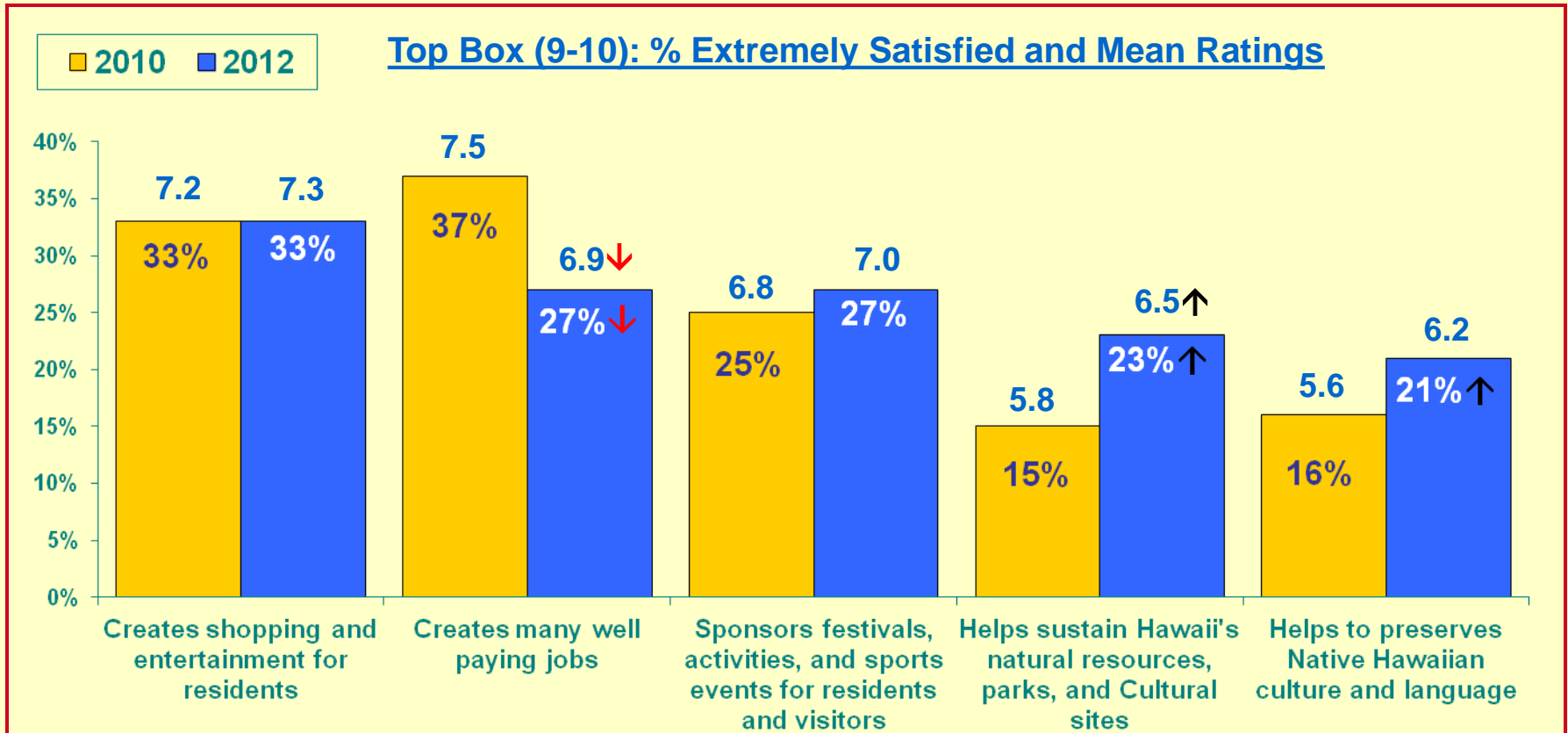
Shaded areas signify statistically significant differences between segments.

Ratings 9-10 %: Satisfaction with Industry	HAWAI'I		MAUI				KAUA'I
	West Hawai'i	East Hawai'i	West Maui	Central East Maui	Moloka'i	Lana'i	
Creates jobs with opportunities for advancement	24%	23%	37%	34%	21%	27%	24%
Creates shopping, restaurants, and entertainment opportunities for residents	26%	26%	38%	37%	23%	29%	20%
Creates many well paying jobs	28%	23%	42%	31%	19%	26%	23%
Sponsors festivals, activities, & sports events for residents & visitors	21%	25%	34%	29%	13%	35%	22%
Helps sustain Hawai'i's natural resources, parks, and cultural sites	21%	22%	30%	29%	11%	19%	19%
Is an industry that enhances residents' quality of life	20%	21%	33%	31%	17%	21%	23%
Helps preserve Native Hawaiian culture and language	19%	17%	27%	22%	10%	31%	19%
<b>BASE</b>	<b>225</b>	<b>224</b>	<b>100</b>	<b>175</b>	<b>75</b>	<b>50</b>	<b>200</b>

Q3b. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?" Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

# Tracking Satisfaction With Industry Involvement: 2010 to 2012

Statewide satisfaction ratings increased with “Creating shopping/entertainment,” “Preserving Native Hawaiian culture,” “Sustaining Hawai‘i’s natural resources,” and “Sponsoring festivals” between 2010 and 2012. Satisfaction decreased however with the industry in “Creating many well paying jobs” between this same time period.



Base: 1,650 statewide residents each in 2010 and 2012.

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

Q3b. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”

NOTE: In 2010, residents were asked to rate agreement with job creation and entertainment opportunities. The comparison here is informational as the question wording has changed.

## 2012 'Bottom Box' Dissatisfaction With Industry Involvement: By County

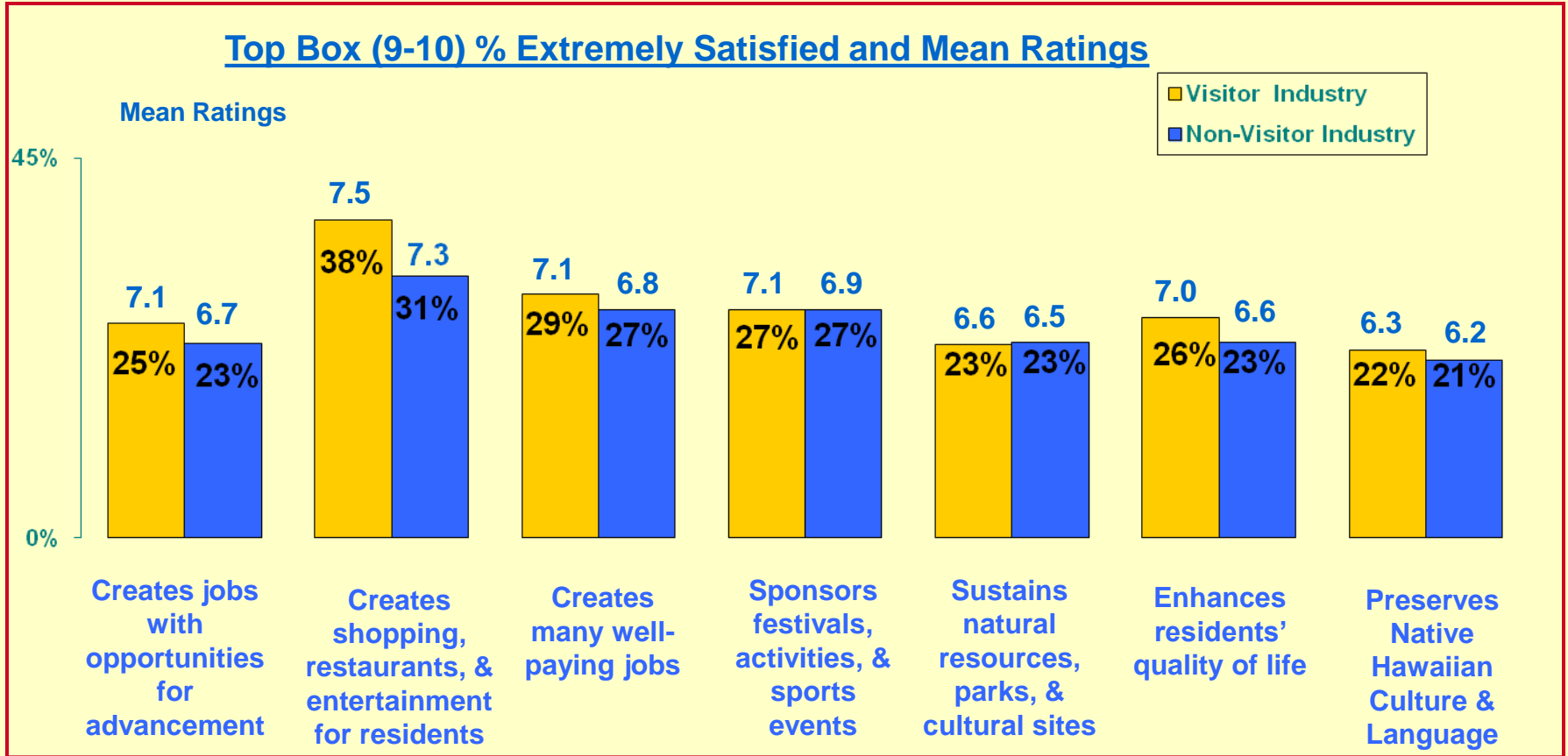
Hawai'i and Kaua'i residents were significantly more dissatisfied than O'ahu or Maui residents across all industry issues except for "Preserving Native Hawaiian culture."

<i>Bottom Box %</i>	O'AHU	HAWAI'I	MAUI	KAUA'I
Creates jobs with opportunities for advancement	28%	33%	19%	32%
Creates shopping, restaurants, and entertainment opportunities for residents	19%	30%	19%	31%
Creates many well paying jobs	26%	32%	20%	32%
Sponsors festivals, activities, & sports events for residents & visitors	25%	36%	25%	38%
Helps sustain Hawai'i's natural resources, parks, and cultural sites	31%	42%	30%	42%
Is an industry that enhances residents' quality of life	29%	36%	21%	38%
Helps preserve Native Hawaiian culture and language	38%	41%	39%	49%
<b>BASE</b>	<b>600</b>	<b>450</b>	<b>400</b>	<b>200</b>

Q3b. "Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?"  
 Note: In OmniTrak's analysis, Top Box=9-10; Mid-Box=6-8; Bottom Box=1-5.

# Satisfaction with Industry Involvement : Visitor Industry vs. Non-Visitor Industry

Satisfaction with attributes of industry involvement is only slightly higher among those affiliated with the Visitor Industry compared to other residents. The largest difference among these groups is with “Creating shopping and entertainment opportunities” where there is a seven percentage point difference.



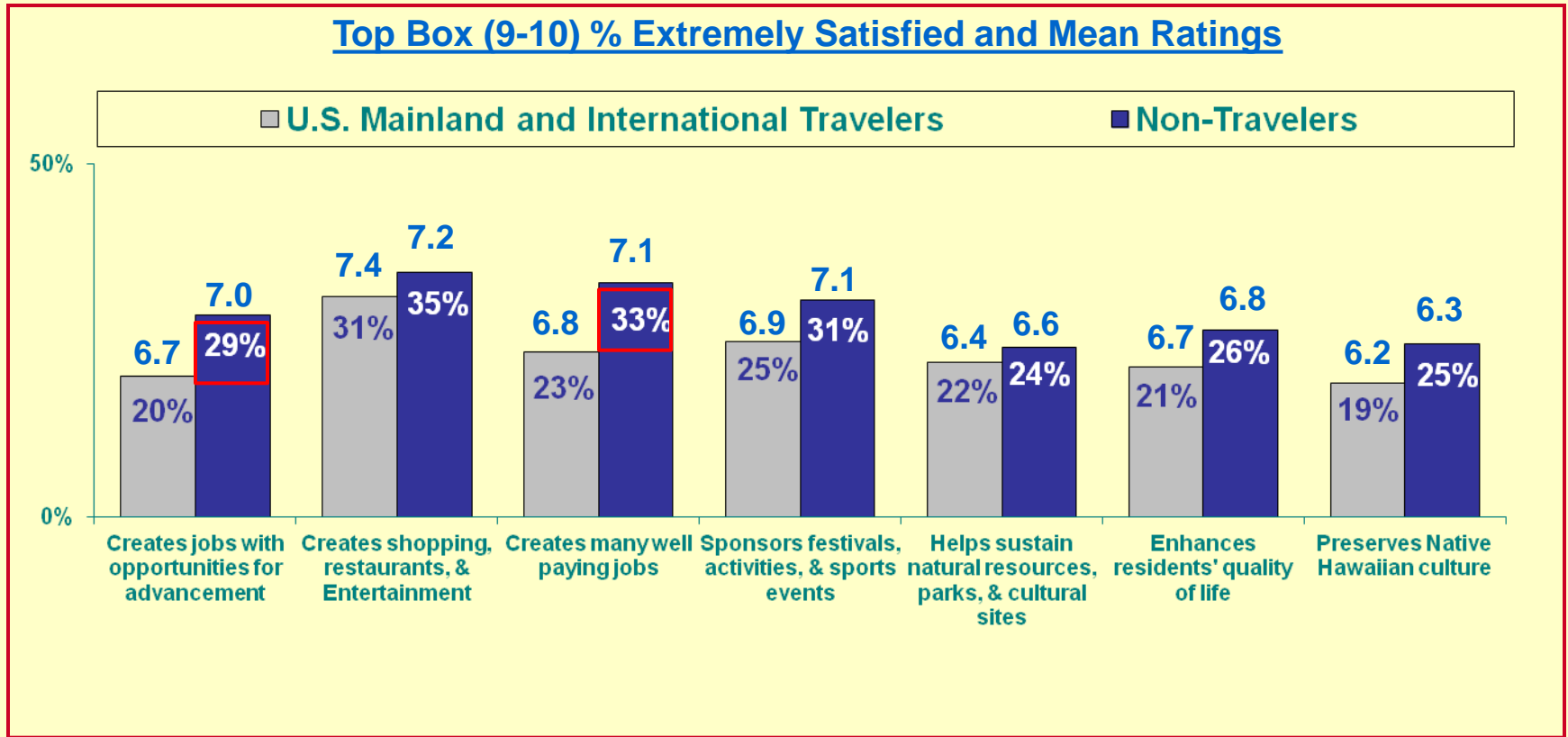
Base: Residents with a household member employed in Tourism: 423 (2010) and 390 (2012); Households with no one employed in tourism: 1,202 (2010) and 1260 (2012).

Q3b. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”



# 2012 Satisfaction With Industry Involvement: Travelers vs. Non-Travelers

In 2012, residents who traveled to either the mainland or internationally were slightly less satisfied with industry involvement than residents who did not travel. One-third of non-travelers gave Top box ratings (9-10) for the industry’s role in “Creating well paying jobs,” significantly higher than travelers. Nearly three in ten of all Non-Travelers gave Top Box ratings for “Creates jobs with opportunities for advancement,” also significantly higher than Travelers.



Bases: 957 residents who traveled to the US mainland or to international destinations, and 693 who did not.

Q3b. “Using a 10-point scale where 10 means extremely satisfied and 1 means not satisfied at all, how satisfied are you that the Tourism industry...?”

# **OVERALL RESIDENTS' ATTITUDE TOWARDS TOURISM INDUSTRY**

# Conclusions

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- Overall community very positive towards visitor industry
- Consistently more critical when economy improves
- Still some areas of concern that need to be addressed
  - Increased lifestyle sensitivity
  - Environmental concerns
  - Perception of industry jobs – advancement opportunities
- Need to monitor and help balance community and visitor experience

# **Next Steps**

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- **Incorporate issues into strategic planning**
  - **State TSP, Brand Sustainability Plan, Agency Plan, Budget and Program Support**

**(For example)**

- **May need HTA-supported communications and outreach effort**
- **Targeted to key stakeholders and issue-specific**
- **Identify opportunities to facilitate industry outreach to community**

# **APPENDIX: Travel Patterns and Profile of Respondents**

# Resident Travel Patterns: 2012

Neighbor Island residents are more likely to travel interisland compared to O‘ahu residents, while O‘ahu residents were more likely than neighbor island residents to travel to the US mainland. In International travel, O‘ahu residents and Maui residents were more likely to travel internationally compared Hawai‘i island or Kaua‘i residents.

No. trips taken for pleasure/business to Neighbor Islands?	STATE	O‘AHU	HAWAI‘I	MAUI	KAUA‘I
None	42%	46%	37%	30%	27%
1	19%	20%	18%	17%	13%
2	15%	13%	18%	19%	21%
3	7%	6%	11%	9%	7%
4	3%	3%	3%	4%	6%
5+	9%	7%	11%	17%	23%
Mean (including 0)	2.0	1.8	2.0	2.6	4.5
No. trips taken to the mainland U.S.?					
None	42%	38%	56%	48%	42%
1	26%	27%	20%	24%	27%
2	13%	12%	13%	15%	14%
3	6%	8%	4%	3%	4%
4	4%	4%	3%	2%	3%
5+	5%	6%	2%	4%	5%
Mean (including 0)	1.5	1.7	0.8	1.0	1.3
No. Trips taken to any international destination?					
None	76%	73%	85%	78%	84%
1	14%	15%	7%	14%	10%
2	3%	3%	4%	3%	--
3+	3%	4%	1%	1%	2%
Mean (including 0)	0.5	0.6	0.2	0.2	0.4
BASE	1,650	600	450	400	200

# Profile of Respondents: 2012 (1 of 2)

	STATE	O'AHU	HAWAI'I	MAUI	KAUA'I
<b>GENDER</b>					
Male	39%	40%	37%	34%	43%
Female	61%	60%	63%	66%	57%
<b>AGE</b>					
18-34	30%	31%	28%	30%	30%
35-54	35%	36%	34%	33%	29%
55+	35%	33%	38%	37%	41%
Average	47.3	47.0	48.1	47.0	48.9
<b>INCOME</b>					
Less than \$35,000	23%	20%	36%	29%	27%
\$35,000 but less than \$75,000	34%	33%	39%	38%	37%
\$75,000 or more	42%	48%	25%	34%	36%
<b>BASE</b>	1,650	600	450	400	200

# Profile of Respondents: 2012 (2 of 2)

	STATE	O'AHU	HAWAI'I	MAUI	KAUA'I
<b>YEARS IN HAWAI'I</b>					
Less than 5 years	7%	8%	5%	6%	7%
5 to 9 years	6%	5%	6%	5%	9%
10 to 19 years	9%	7%	11%	15%	9%
20 years or more	16%	16%	19%	17%	17%
Born in Hawai'i	59%	61%	56%	54%	57%
<b>ETHNIC BACKGROUND</b>					
Caucasian	22%	19%	30%	29%	31%
Hawaiian/part-Hawaiian	24%	21%	31%	28%	27%
Japanese	18%	21%	12%	10%	11%
Filipino	12%	12%	8%	15%	16%
Other	24%	26%	18%	18%	15%
<b>TOURISM EMPLOYMENT</b>					
Employed in Industry *	23%	17%	23%	52%	33%
Not employed	77%	83%	77%	48%	67%
<b>BASE</b>	<b>1,650</b>	<b>600</b>	<b>450</b>	<b>400</b>	<b>200</b>

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



# 2012 Resident Sentiment Survey



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