



HTA Resident Sentiment Survey 2017

Prepared for the:
Hawai'i Tourism Authority: Project #5527
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Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining sustainable growth in the industry and in the state's economy overall.
- In its "Five-Year Strategic Plan 2016," the Hawai'i Tourism Authority established *Improving the Integrity of the Destination* as the first goal of the plan, and identified measures of resident sentiment as a gauge to measure progress towards this goal
- The Resident Sentiment Survey (RSS) has been conducted 12 times since 1999, and the current survey was conducted by OmniTrak Group, Inc. The primary objectives of the RSS research are:
 - To track key resident attitudes toward tourism in Hawai'i over time.
 - To identify perceived positive and negative impacts of the visitor industry on local residents.
 - To identify for the visitor industry and HTA, issues or concerns regarding tourism expressed by residents.

Sample Plan and Methodology

Sample Plan

OmniTrak used a region-based stratified sampling for the study, the same approach used in earlier Resident Sentiment survey efforts conducted by OmniTrak. The sampling plan divided the State into 12 sub-regions with consideration to population proportion, and allocated sufficient sample for each area to achieve an acceptable sampling error. Within each region, data was collected randomly. The resulting sample of residents was weighted proportionate to population distribution per the latest State Census from the state Department of Business, Economic Development and Tourism. The sample includes both landline (45%) and cellular (55%) phones.

Statewide sampling produced a total of $n = 1,650$ respondents as follows:

- O'ahu: 600
- Hawai'i Island: 450
- Maui County: 400
- Kaua'i: 200

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: February 17 to April 9, 2017



Key Recommendations & Takeaways

Key Recommendations & Takeaways

1

Having a Voice in Tourism Development, Presenting Native Hawaiian Culture Authentically Keys to Improving Resident Sentiment

Following the Hawai'i visitor industry's fifth consecutive year of record visitor arrivals in 2016, overall resident perceptions of the favorability of the industry are holding steady with sentiment levels last measured in 2015. On a 10-point scale, Hawai'i residents gave the visitor industry a mean favorability rating of 7.90 in the opening months of 2017, a level relatively even with 2015 ratings (7.95).

However, Hawai'i residents were slightly less likely to agree that "Tourism has brought more benefits than problems" (i.e., 63% rating their agreement with the statement as a 6-10 in 2017 vs. 66% in 2015).

Historically, agreement with "*Tourism has brought more benefits than problems*" has peaked during downturns in arrivals (i.e., 2001-'02 and 2009-'10). With the state Department of Business, Economic Development and Tourism forecasting continued arrivals growth through the year 2020, improving resident sentiment is vital to achieving sustainable growth in the industry.

In order to foster deeper resident sentiment in regards to the net benefit of tourism, the Hawai'i Tourism Authority should orient its community outreach, communications and product development initiatives around emphasizing the economic, social, cultural and community benefits of tourism, with a particular emphasis on **providing opportunities for residents to have a voice in tourism development decisions** and **presenting Native Hawaiian culture in an authentic manner**.

2

Evolve Resident Perceptions of HTA from Destination *Marketing* Organization to Destination *Management* Organization

As the state's lead tourism organization, positive/negative resident sentiment towards the visitor industry likely also impacts their perceptions of the Hawai'i Tourism Authority. Overall perceptions of the favorability of HTA slipped slightly in the opening months of 2017. While combined Top Box/Mid Range favorability scores inched marginally higher (67% in 2017 vs. 66% in 2015), Bottom Tier scores advanced faster (30% in 2017 vs. 26% in 2015) due to a decrease in "Don't know" responses.

Hawai'i residents who are aware of HTA, primarily view the Authority as being responsible for marketing and promoting Hawai'i tourism. Notably fewer residents are aware of HTA's role in areas beyond marketing, such as promoting sustainable tourism, balancing resident/visitor needs of natural resources, and communicating with residents regarding tourism concerns.

Residents' perceptions of HTA are largely influenced by the Authority's roles in marketing (23%), communications with residents (23%), setting tourism policy (17%) and fostering appreciation of the Hawaiian culture (15%).

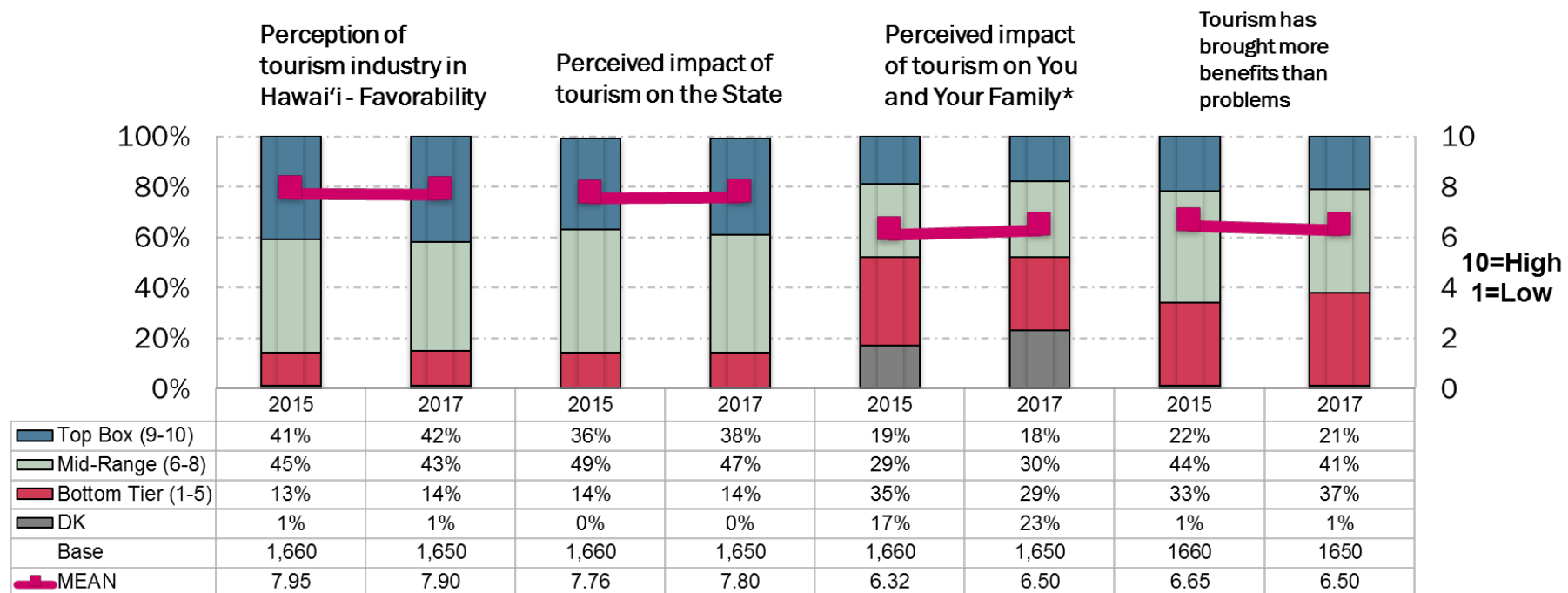
As HTA already receives its strongest satisfaction ratings for its marketing efforts, HTA should heighten its community outreach, communications and product development initiatives to deepen resident awareness and engagement with its roles beyond marketing, especially **communicating with residents about tourism**, **setting tourism policy** and **fostering appreciation of the Hawaiian culture**.



Executive Summary

Executive Summary – Key Resident Sentiment Indicators

Following the Hawai'i visitor industry's fifth consecutive year of record visitor arrivals in 2016, overall resident perceptions of the favorability of the industry and its impact on their households are holding steady with sentiment levels last measured in 2015. On a 10-point scale, Hawai'i residents gave the visitor industry a favorability rating of 7.90 in the opening months of 2017, a level relatively even with 2015 ratings (7.95). Meanwhile, residents' assessment of the positive/negative impact of the industry on the state also held steady (7.80 in 2017, vs. 7.76 in 2015); while their assessment of the impact on their personal household improved (6.50 vs. 6.32). However, improvements at the personal level were driven by a decreasing number of bottom tier scores which resulted from an increase in "No impact/Don't know" responses to this question. Factoring in the positive/negative impacts of tourism, 63 percent of residents are in agreement that "Tourism has brought more benefits than problems" (i.e., down slightly from 66% in 2015).



Q. 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.

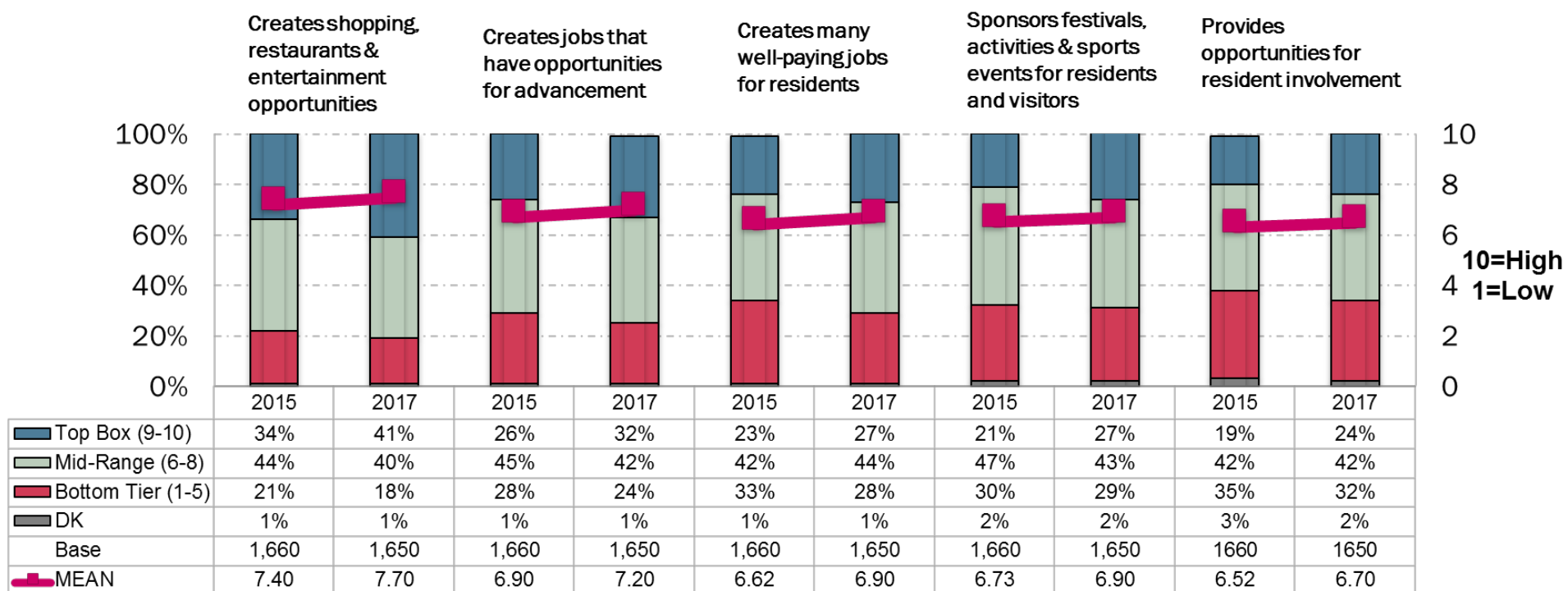
*Note: Don't Know (DK) category for this question includes for "Don't know" and "No impact".

Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole/You and Your Family?

Q. 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.....?

Executive Summary – Impact of Hawai‘i Tourism

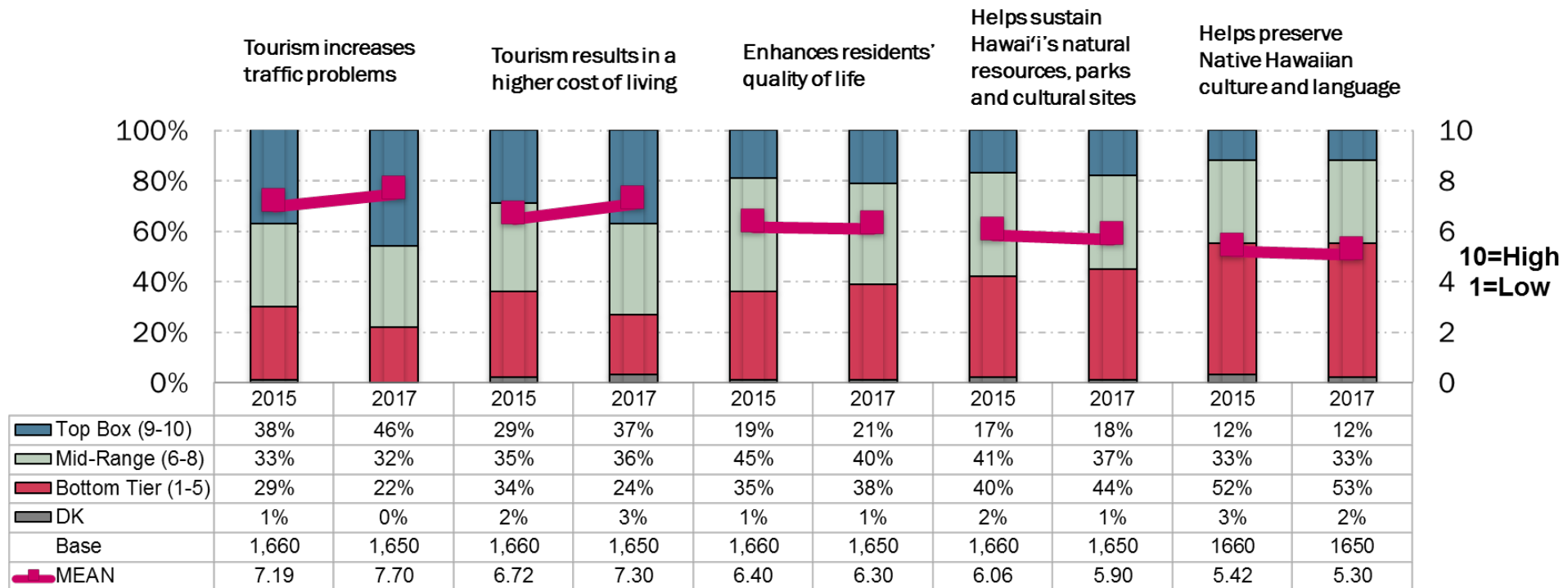
Beneath the observed stability in the overall indicators of resident sentiment measured in the opening months of 2017, improved ratings in about half of the tracking measures were offset by weakened sentiment in the other half of the measures. On the positive side, Hawai‘i residents increasingly viewed the visitor industry as one that *Creates shopping, restaurant and entertainment opportunities* (i.e., mean score of 7.70 in 2017 vs. 7.4 in 2015); *Creates jobs with opportunities for advancement*; *Creates many well-paying jobs for residents*; *Sponsors festivals, activities and sports events for residents and visitors*; and *Provides opportunities for resident involvement*.



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

Executive Summary – Impact of Hawai‘i Tourism

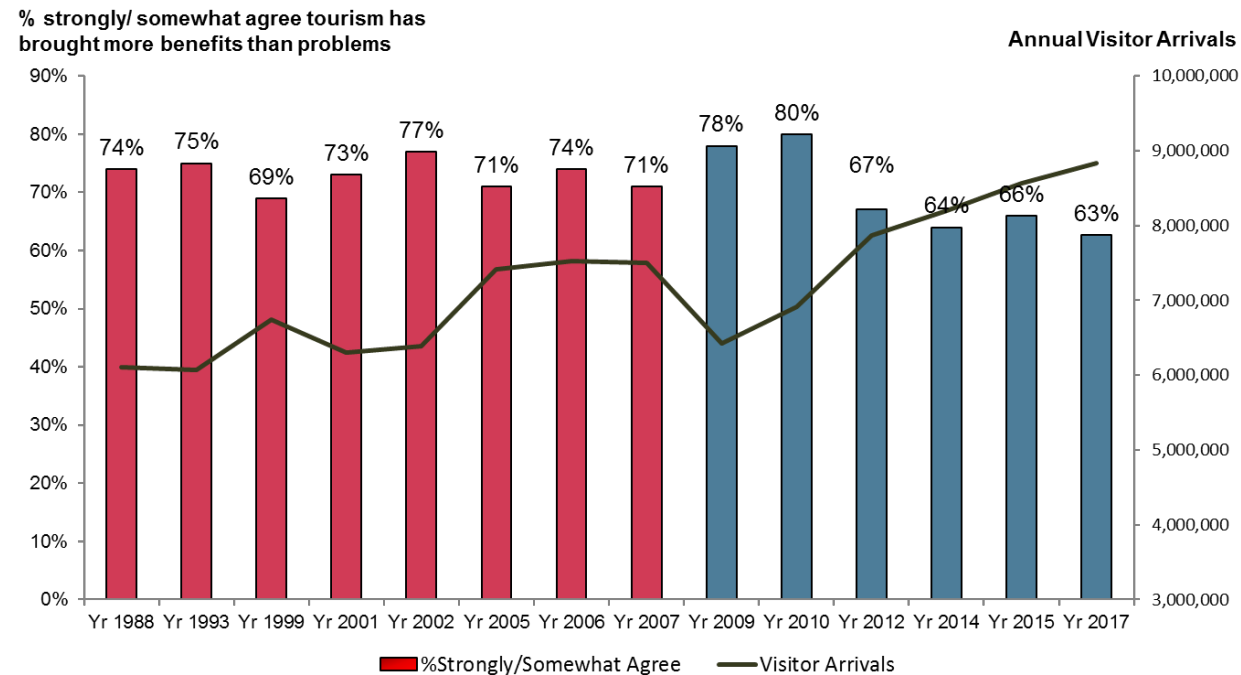
On the downside, Hawai‘i residents also perceive the visitor industry as one that *Increases traffic problems* (i.e., 7.70 in 2017 vs. 7.19 in 2015) and *Results in a higher cost of living* (7.30 in 2017 vs. 6.72 in 2015). In addition, the latest sentiment results indicate that residents were slightly less likely to say that tourism *Enhances their quality of life*; *Helps sustain Hawai‘i’s natural resources, parks and cultural sites*; and *Helps to preserve Native Hawaiian culture and language*.



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

Executive Summary – Impact of Hawai‘i Tourism

Factoring in both the positive and negative impacts of the visitor industry, Hawai‘i residents were slightly less likely to agree that “*Tourism has brought more benefits than problems*” (i.e., 63% in 2017 vs. 66% in 2015). When asked about what specific problems tourism has created, *Traffic problems* (51%), *Higher prices/cost of living* (43%), *Overcrowding* (39%), *Damage to the environment* (30%), and *No respect for the culture* (22%) were the top problems cited by residents who were more apt to say that tourism’s problems outweighed its benefits. Historically, a greater appreciation of the positive impacts of tourism occurred during downturns in the visitor industry, with the percentage of residents agreeing that “*Tourism has brought more benefits than problems*” rising to historic highs during downturns in arrivals during the 2001-’02 and 2009-’10 periods.

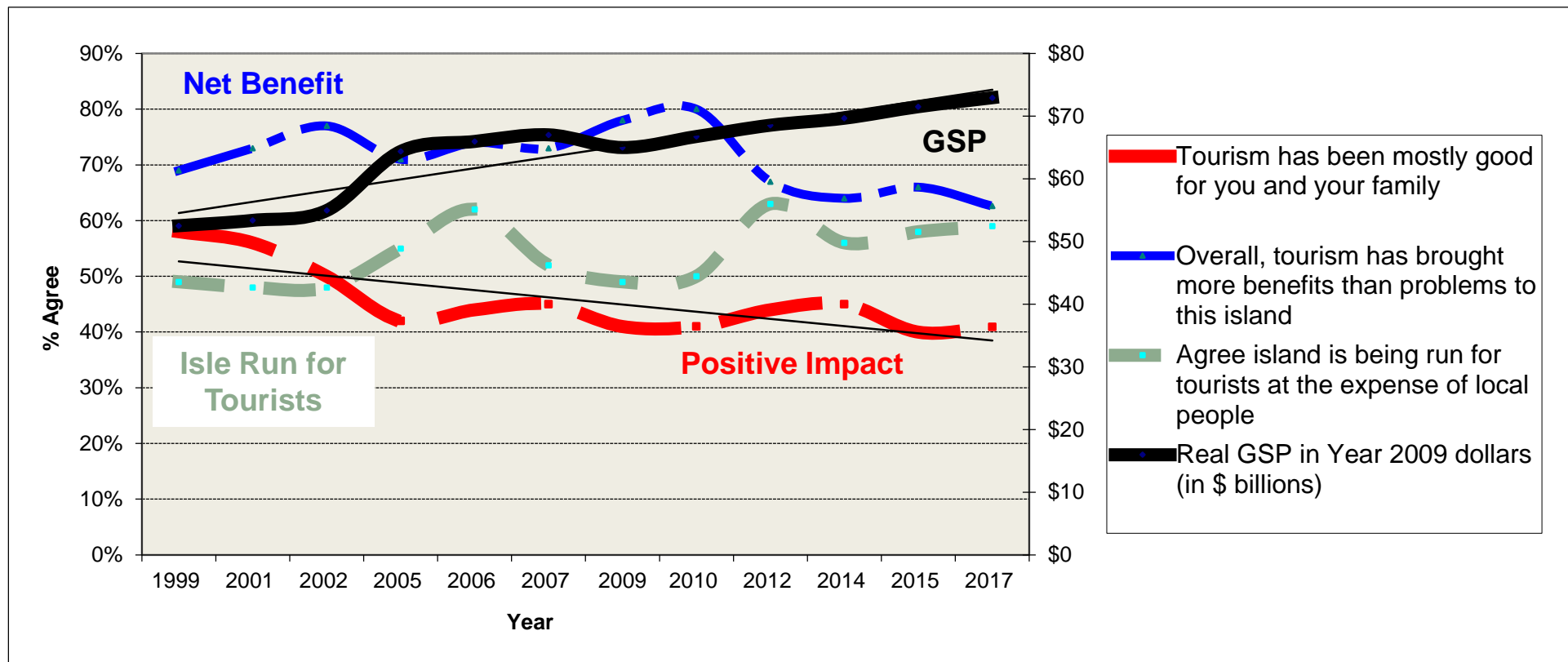


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q. 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...?

Executive Summary – Impact of Hawai‘i Tourism

Resident sentiment toward Hawai‘i’s visitor industry is vital to maintaining sustainable growth in the industry and in the state’s economy overall. Historically, key resident attitudes toward the visitor industry have had a negative correlation ($r^2=0.79$) with growth in Gross State Product (GSP), according to a regression analysis of key perceptions (both positive and negative) on tourism. In good times, residents are more critical of the industry; and in bad times, a higher value is placed on tourism. Over time, the percentage of residents who agree that “Tourism has been mostly good for you and your family” has trended in the opposite direction of growth in the state’s economy.



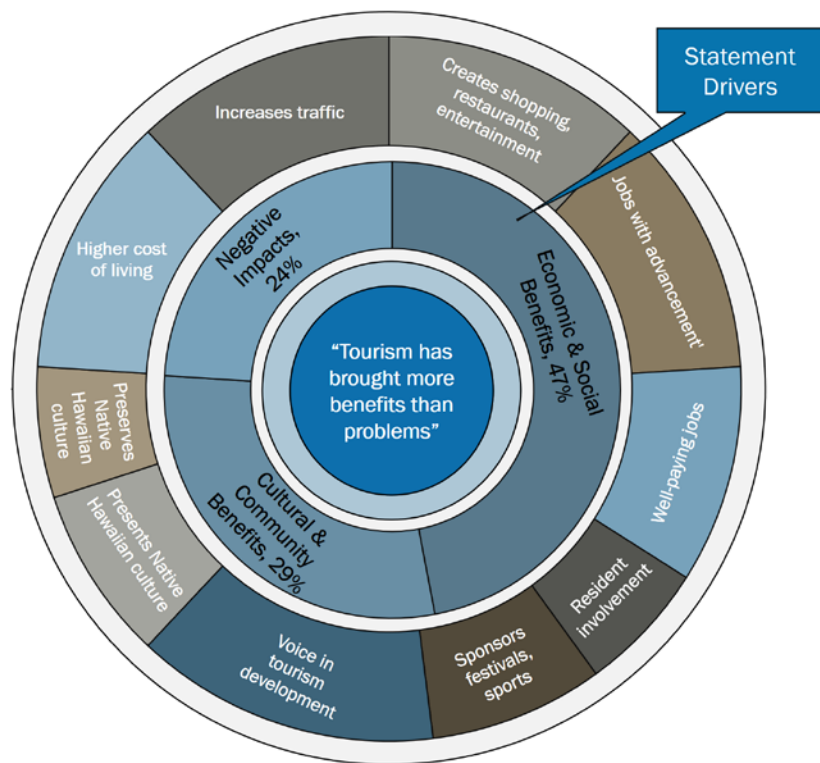
* Source for GSP: State of Hawai‘i, 2016 Data Book

Executive Summary – Drivers of Resident Sentiment

Residents and the host culture are vital to the success of Hawai'i's visitor industry, and sentiment toward tourism has historically been juxtaposed with rising visitor volumes. With the state Department of Business, Economic Development and Tourism forecasting continued arrivals growth through the year 2020, improving sentiment is imperative to the Hawai'i Tourism Authority's "Five-Year Strategic Plan 2016" goal of improving the integrity of the destination.

As the lead organization for tourism in the state, the Hawai'i Tourism Authority possesses the opportunity to strengthen resident sentiment in regards to the benefits of tourism. According to an analysis of the "drivers" of resident sentiment, attitudes toward economic and social benefits influence nearly half (47%) of resident attitudes toward the net benefit of tourism. Meanwhile, attitudes in regards to cultural and community benefits influence about a third (29%) and attitudes toward negative impacts influence about a quarter (24%) of resident sentiment.

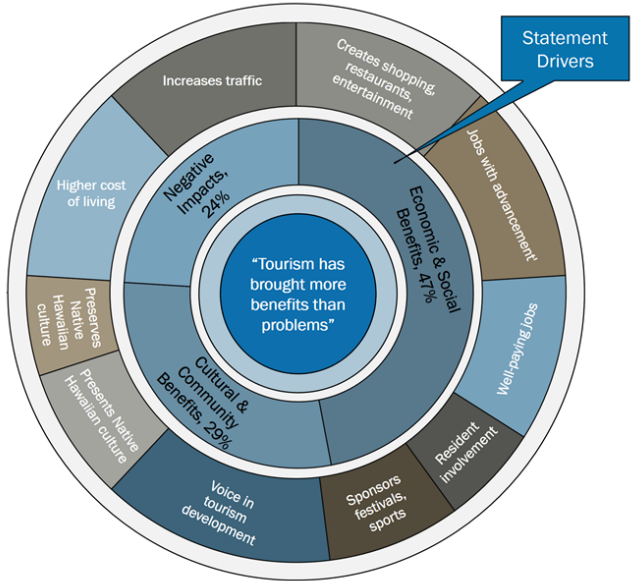
In order to foster a deeper understanding and appreciation of the net benefits of tourism, HTA should orient its community outreach, communications and product development initiatives around emphasizing the economic, social, cultural and community benefits of tourism (e.g., tourism infrastructure, job creation, resident involvement in tourism development, presenting Hawaiian culture authentically), while taking actions to lessen the actual and perceived negative impacts of tourism (e.g., traffic, higher prices).



Executive Summary: Drivers of Resident Sentiment

Within the overall drivers of the net benefit of tourism, the specific individual attributes with the most weight are that tourism:

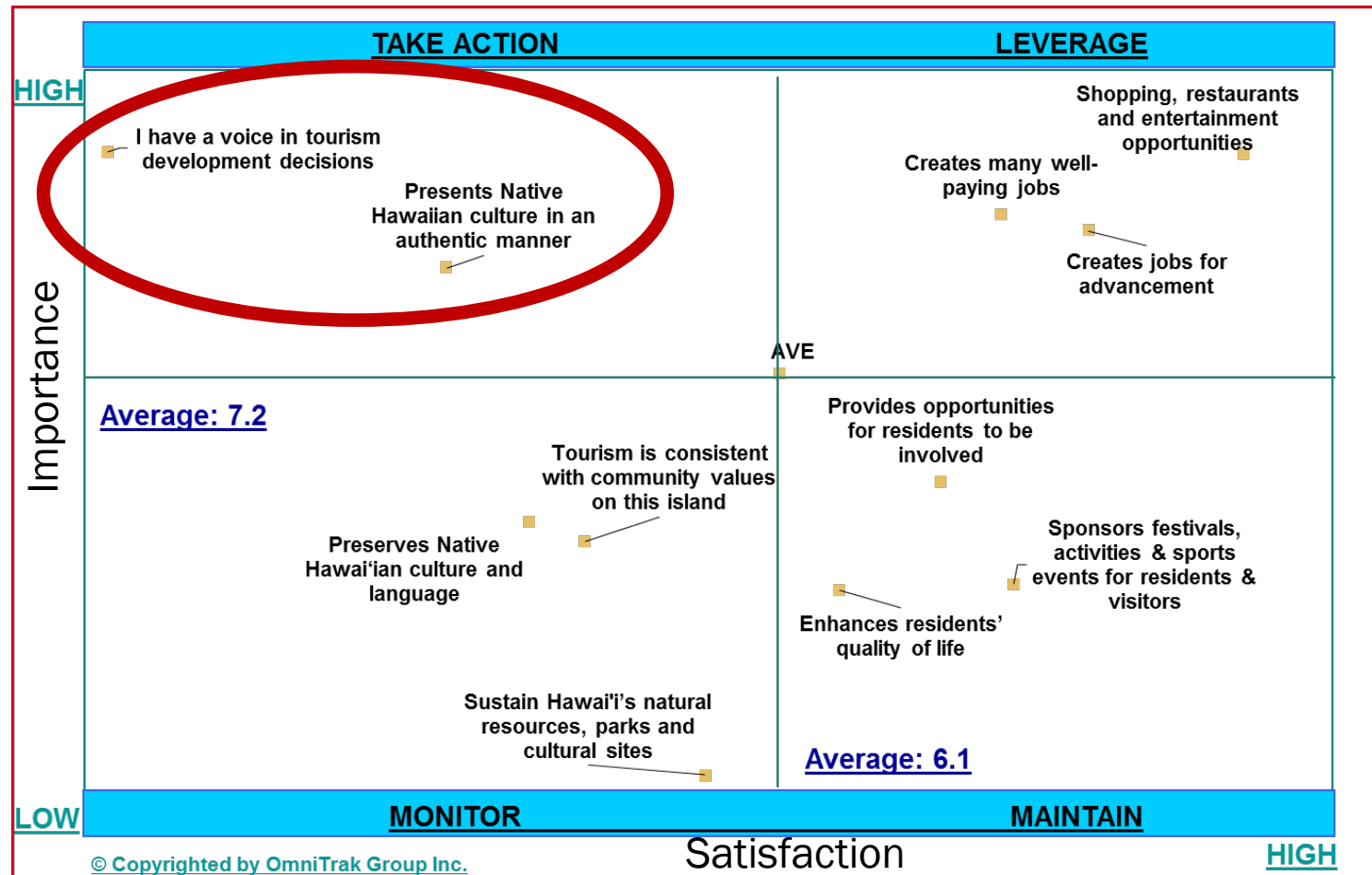
- Creates shopping, restaurants and entertainment opportunities: 11%
- Creates jobs that have opportunities for advancement: 10%
- Creates many well-paying jobs for residents: 10%
- (Provides residents) a voice in tourism development decisions: 11%
- Currently presents Native Hawaiian culture in an authentic manner: 9%



Drivers (Driver Weight)	Attribute	Attribute Weights
Economic & Social Benefits (47%)	Creates shopping, restaurants & entertainment opportunities	11%
	Creates jobs that have opportunities for advancement	10%
	Creates many well-paying jobs for residents	10%
	Provides opportunities for residents to be involved	5%
	Tourism reminds me that we have a unique culture to share with visitors	4%
	Sponsors, festivals, activities & sports events for residents and visitors	4%
	Is an industry that enhances residents' quality of life	3%
	Well-paying jobs	10%
Cultural & Community Benefits (29%)	I feel like I have a voice in my island's tourism development decisions	11%
	Tourism currently presents Native Hawaiian culture in an authentic manner	9%
	Helps to preserve Native Hawaiian culture and language	5%
	Tourism is consistent with community values on this island	4%
Negative Impacts (24%)	Tourism results in a higher cost of living	7%
	Tourism in Hawai'i increases traffic problems	6%
	My island's economy is too dependent on tourism	6%
	This island is being run for tourists at the expense of local people	5%

Executive Summary: Drivers of Resident Sentiment

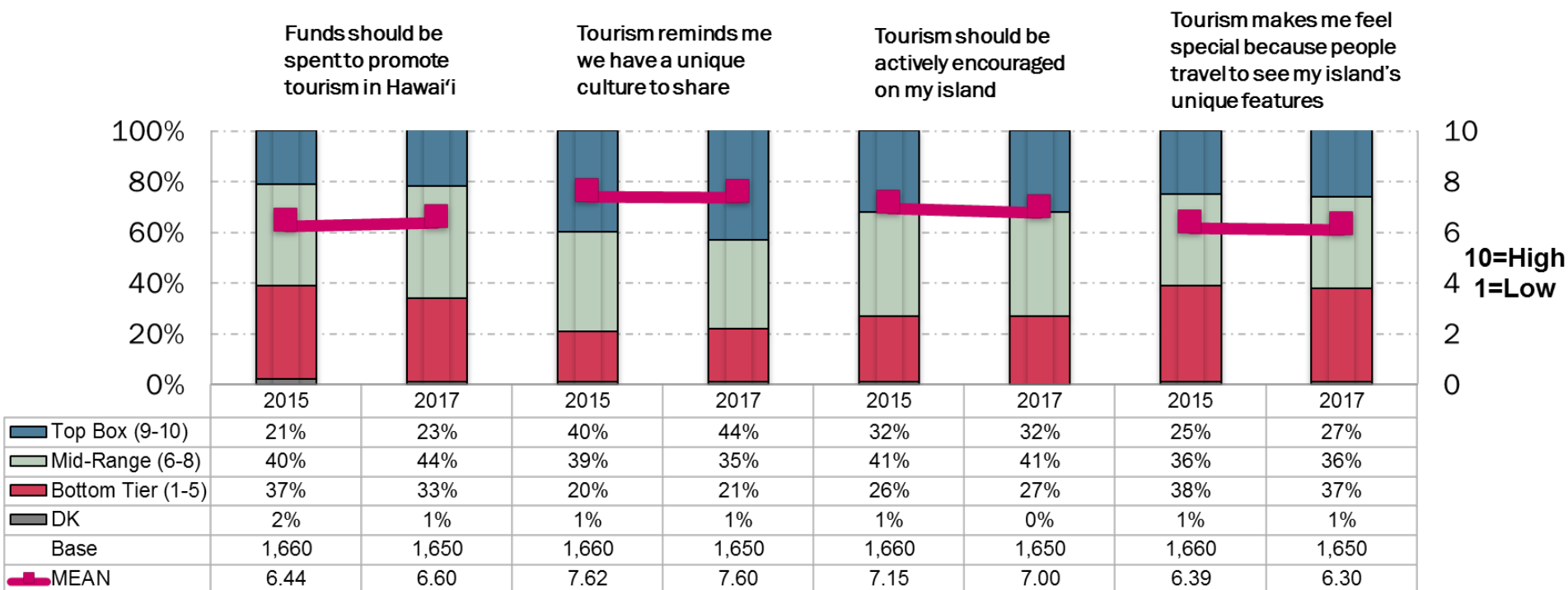
Among the specific resident attitudes which influence sentiment toward the net benefits of the visitor industry, the two with the most potential for improvement are “*I have a voice in tourism development decisions*” and “*Presents Native Hawaiian culture in an authentic manner.*” According to OmniTrak’s “Need Gap” Analysis, these two attributes are presently high in importance but low in satisfaction ratings. By comparison, attributes related to job creation, shopping, restaurants and entertainment rate high in both importance and satisfaction.



A “Need Gap” occurs when ratings of satisfaction lags perceived importance, implying a need to bring satisfaction up to par with consumer expectations.

Executive Summary – General Perceptions

While concerns about the net benefit of tourism have slightly weakened, residents continue to agree that “*Funds should be spent to promote tourism in Hawai‘i*” (i.e., rating their agreement as a 6.6 on a 10-point scale in 2017 vs. 6.44 in 2015). In addition, general perceptions of tourism held relatively steady as an industry that should be actively encouraged, and one that made residents feel good about the unique features and unique cultures on their islands.



Q. 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 ...

Executive Summary – General Perceptions

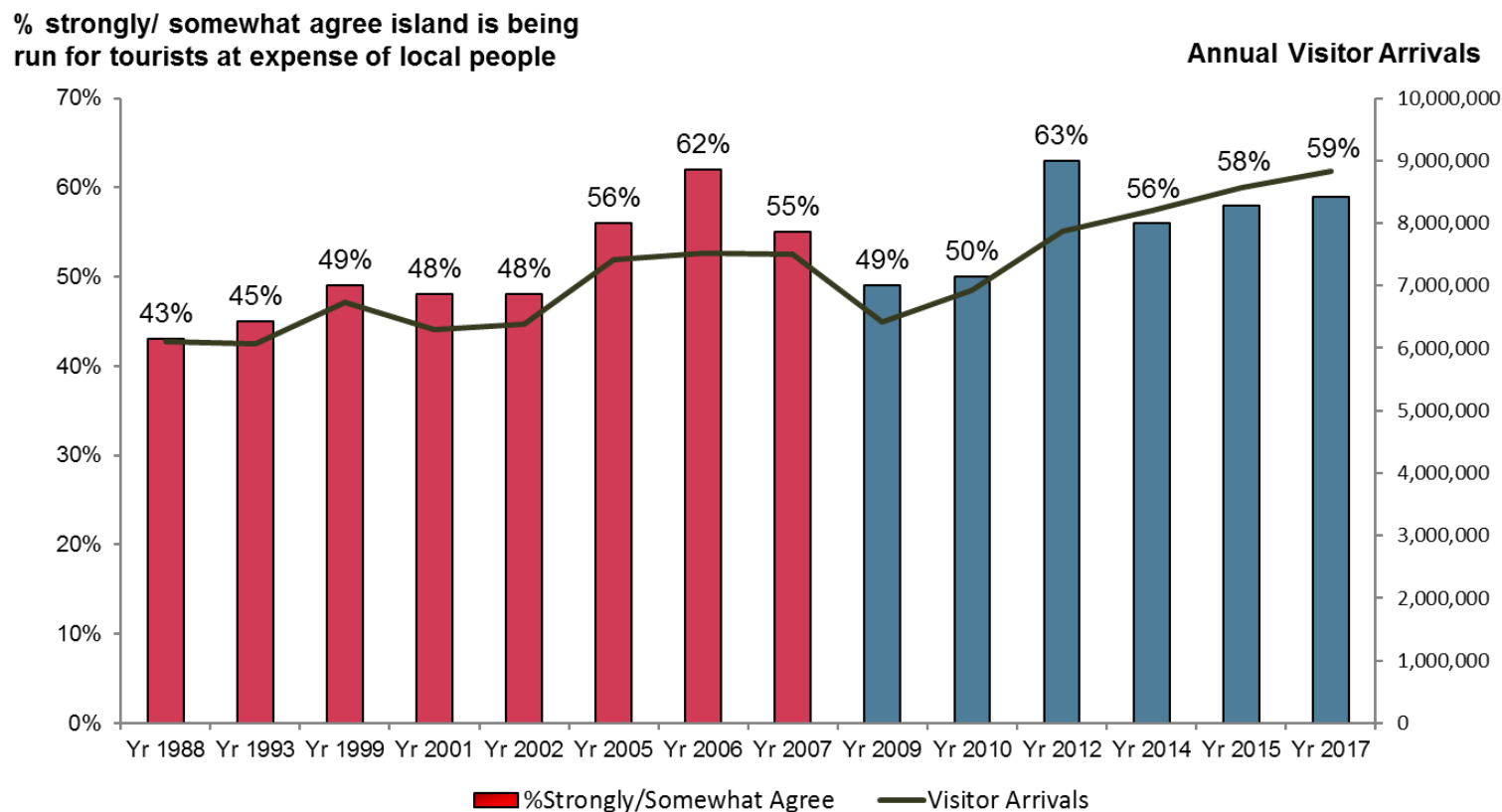
On the other hand, residents were more notably inclined to agree that their *Island's economy is too dependent on tourism* (i.e., 7.70 in 2017 vs. 7.29 in 2015); and less inclined to agree that they have a *Voice in tourism development decisions*, that *Tourism is consistent with community values*, and that it *Presents Native Hawaiian culture authentically*.



Q. 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...

Executive Summary – General Perceptions

Residents were also slightly more apt (59% in 2017 vs. 58% in 2015) to agree that “*This island is being run for tourists at the expense of local people*” – a measure which has historically risen and fallen in tandem with total visitor arrivals to the state.



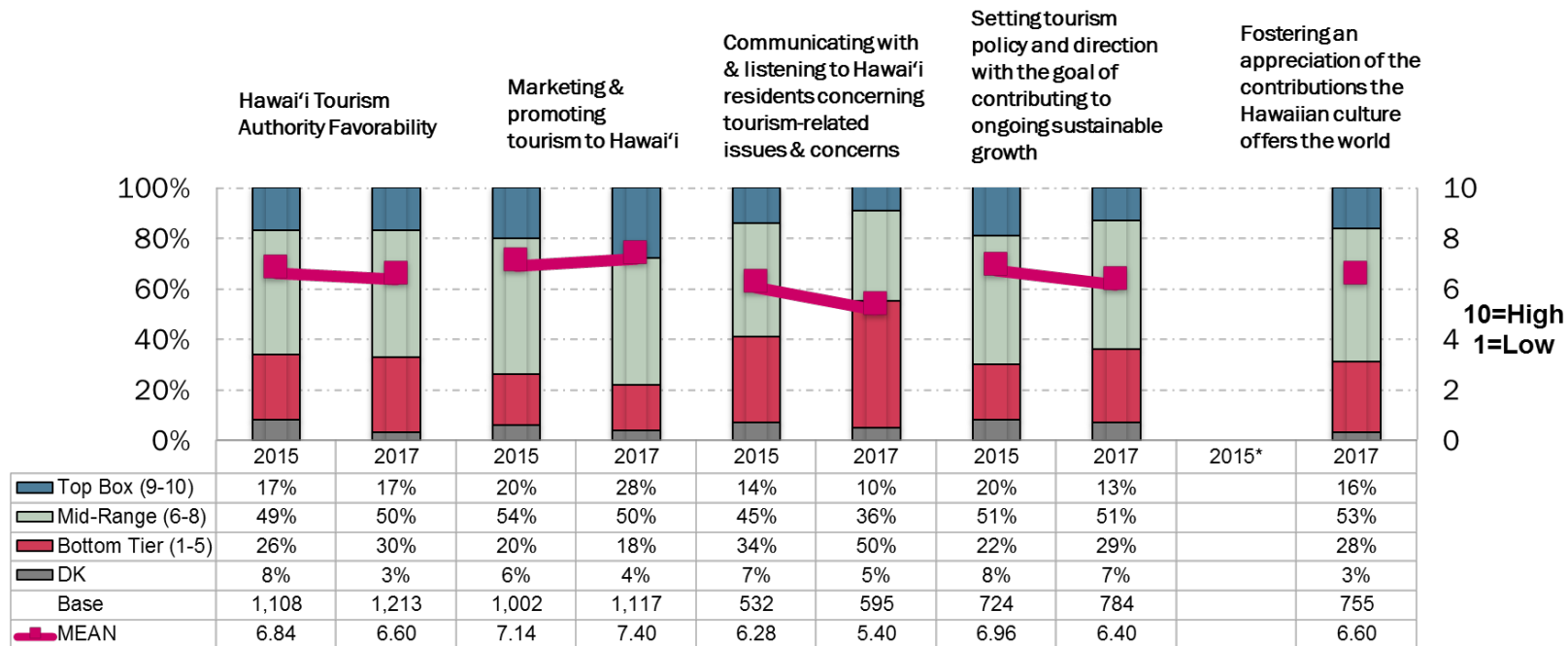
In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

Q. 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...?

Executive Summary – Hawai‘i Tourism Authority Key Indicators

As the state’s lead tourism organization, positive/negative resident sentiment towards the visitor industry likely also impacts their perceptions of the Hawai‘i Tourism Authority. Overall perceptions of the favorability of the Hawai‘i Tourism Authority slipped slightly in the opening months of 2017. While combined Top Box/Mid Range favorability scores inched marginally higher (67% in 2017 vs. 66% in 2015), Bottom Tier scores advanced faster (30% in 2017 vs. 26% in 2015) due to a decrease in “Don’t know” responses.

Among residents who are aware that HTA plays a major role in marketing Hawai‘i, satisfaction with the Authority as a marketing organization has risen (i.e., mean score of 7.40 in 2017 vs. 7.14 in 2015). However, satisfaction in other key areas has weakened, including Communicating with Hawai‘i residents (5.40 in 2017 vs. 6.28 in 2015) and Setting tourism policy (6.40 in 2017 vs. 6.96 in 2015).



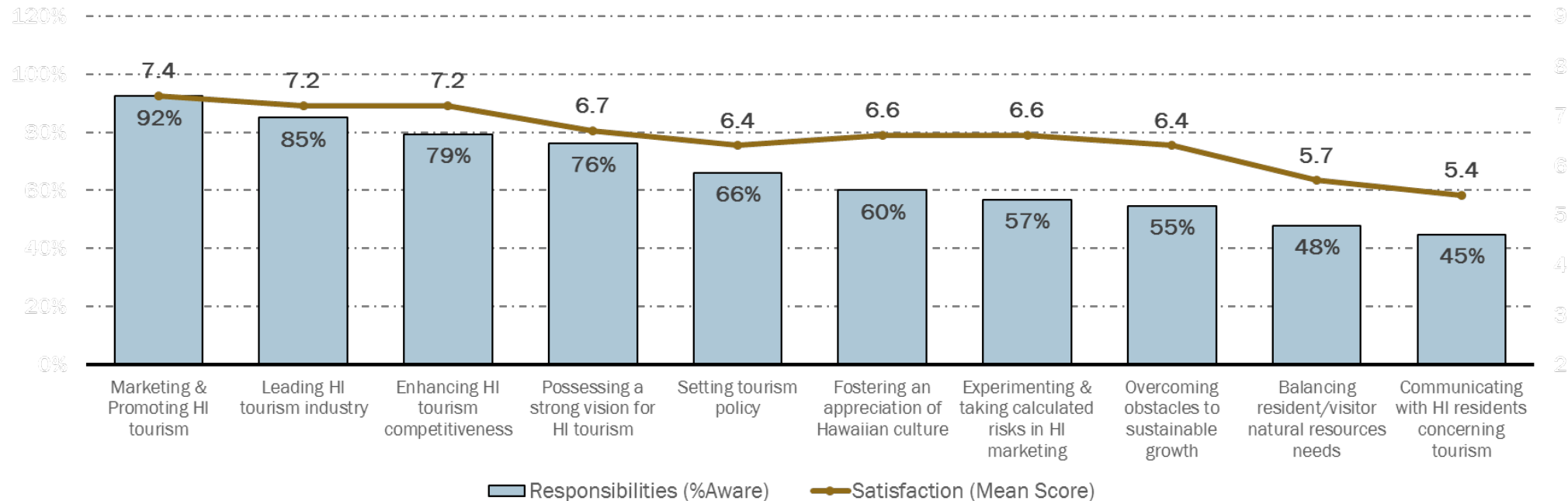
*Note: Statement not measured in 2015.

Q. Using a 10-point scale where 10 means you think the Hawai‘i Tourism Authority is doing an Excellent job and 1 means you think the Hawai‘i Tourism Authority is doing a Poor job, how would you rate the job the Hawai‘i Tourism Authority is doing in.....?

Q. Using a 10-point scale where 10 means extremely favorable and one means not favorable at all, please give me your opinion of the Hawai‘i Tourism Authority (HTA) overall and their work to promote Hawai‘i tourism:

Executive Summary – Hawai‘i Tourism Authority

Beyond the Key Indicators, Hawai‘i residents who are aware of HTA (i.e., 74% of total respondents), first and foremost view the Authority as being responsible for *Marketing and promoting Hawai‘i tourism* (92%), *Leading Hawai‘i’s tourism industry* (85%) and *Enhancing Hawai‘i’s tourism competitiveness* (79%). Notably fewer residents are aware of HTA’s role beyond marketing-related areas, such as *Overcoming obstacles to sustainable tourism growth* (55%), *Balancing resident/visitor needs of natural resources* (48%), and *Communicating with residents regarding tourism concerns* (45%). Parallel with decreasing levels of awareness in activities beyond marketing, resident satisfaction with these lesser known areas is also lower (i.e., among residents who are aware of HTA’s role in these areas). Moving forward, the opportunity exists to deepen awareness and satisfaction with HTA beyond its role in marketing and promoting Hawaii tourism – an opportunity to move beyond destination marketing to destination management in the minds of Hawai‘i residents.



Q. Prior to doing this survey, were you aware that the Hawai‘i Tourism Authority is responsible for and has an important role in?

Q. Using a scale of 1 to 10 where 10 means you think the Hawai‘i Tourism Authority is doing an Excellent job and 1 means you think the Hawai‘i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?

Executive Summary: Drivers of HTA Favorability

Favorable perceptions of the Hawai'i Tourism Authority are influenced by four overall drivers, including its roles in Competitive Destination Marketing (31%); Communications with Residents (30%); Setting Tourism Policy with Vision (24%); and Appreciation of the Hawaiian Culture (15%).

Within the overall drivers, the individual attributes with the most influence on residents' perceptions of HTA are Marketing (23%), Communications with residents (23%), Setting Tourism Policy (17%) and Fostering appreciation of the Hawaiian culture (15%).

As HTA already receives its highest satisfaction scores in the Marketing arena (7.4), the potential "ROI" of targeting the remaining three areas (i.e., resident communications (5.4), tourism policy (6.4), Hawaiian culture (6.6)) with heightened community outreach, communications and product development initiatives is greater.

Drivers (Driver Weight)	Attribute	Attribute Weights	Satisfaction (Mean Score)
Competitive Destination Marketing (31%)	Marketing and promoting tourism to Hawai'i	23%	7.4
	Enhancing the competitiveness of Hawai'i as a destination	8%	7.2
Communications with Residents (30%)	Communicating with and listening to Hawai'i residents concerning tourism-related issues and concerns	23%	5.4
	Balancing the needs of residents with expectations of visitors and protecting the resources of Hawai'i	7%	5.7
Setting Tourism Policy with Vision (24%)	Setting tourism policy and direction with the goal of contributing to the ongoing, sustainable growth of Hawai'i's economy	17%	6.4
	Possessing a strong vision for the future of Hawai'i's tourism industry	7%	6.7
Appreciation of Hawaiian Culture (15%)	Fostering an appreciation of the contributions the Hawaiian culture offers to the world	15%	6.6

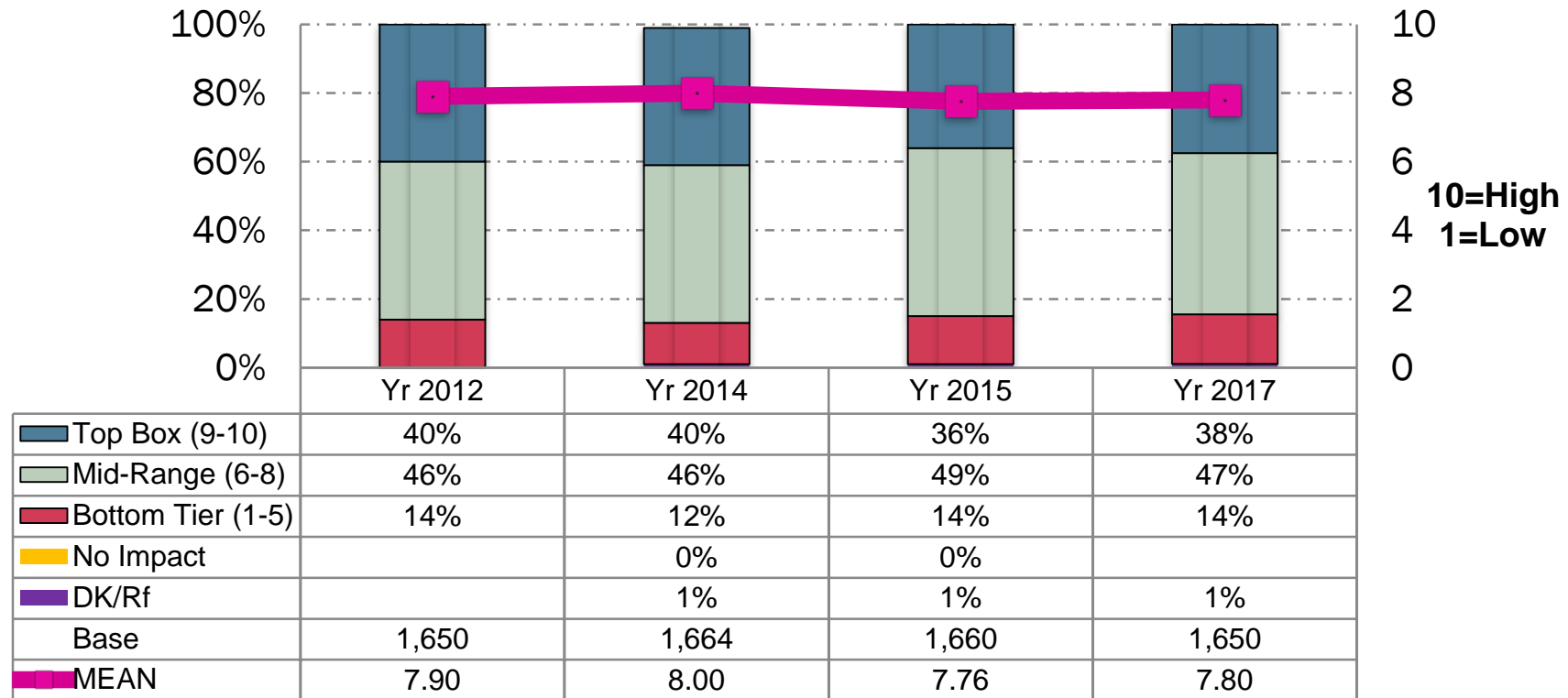


Detailed Findings



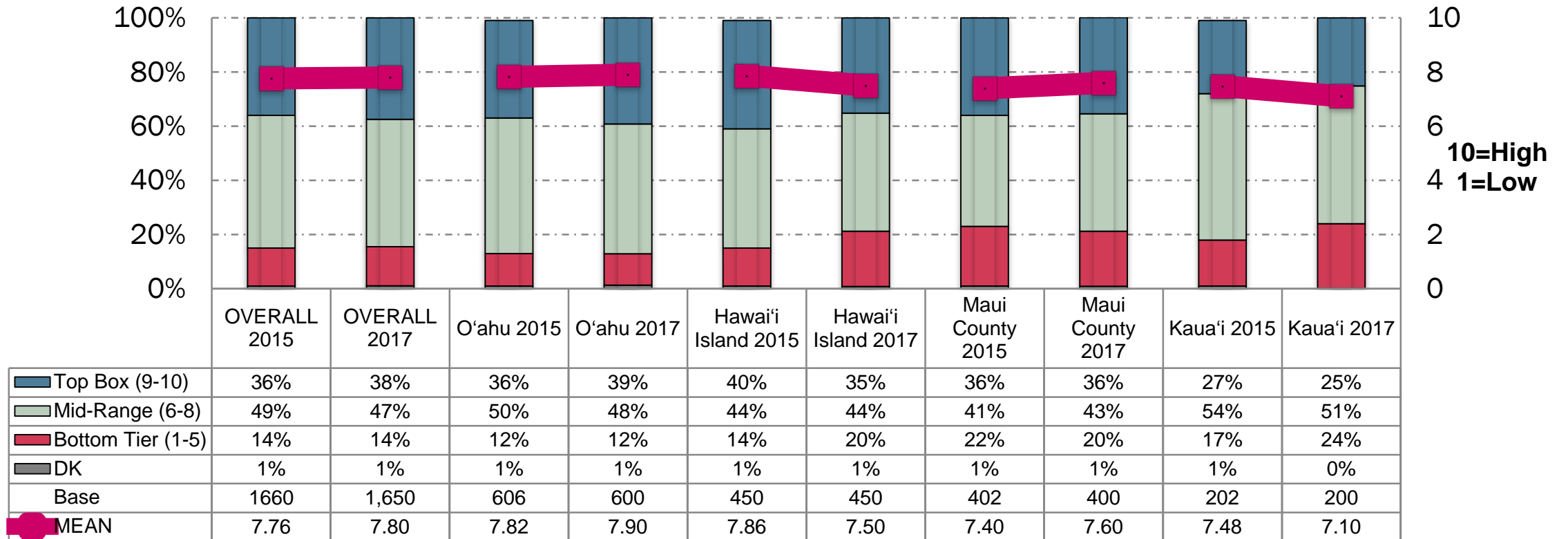
Impact of the Visitor Industry

Impact of Tourism on the State - *Overall*



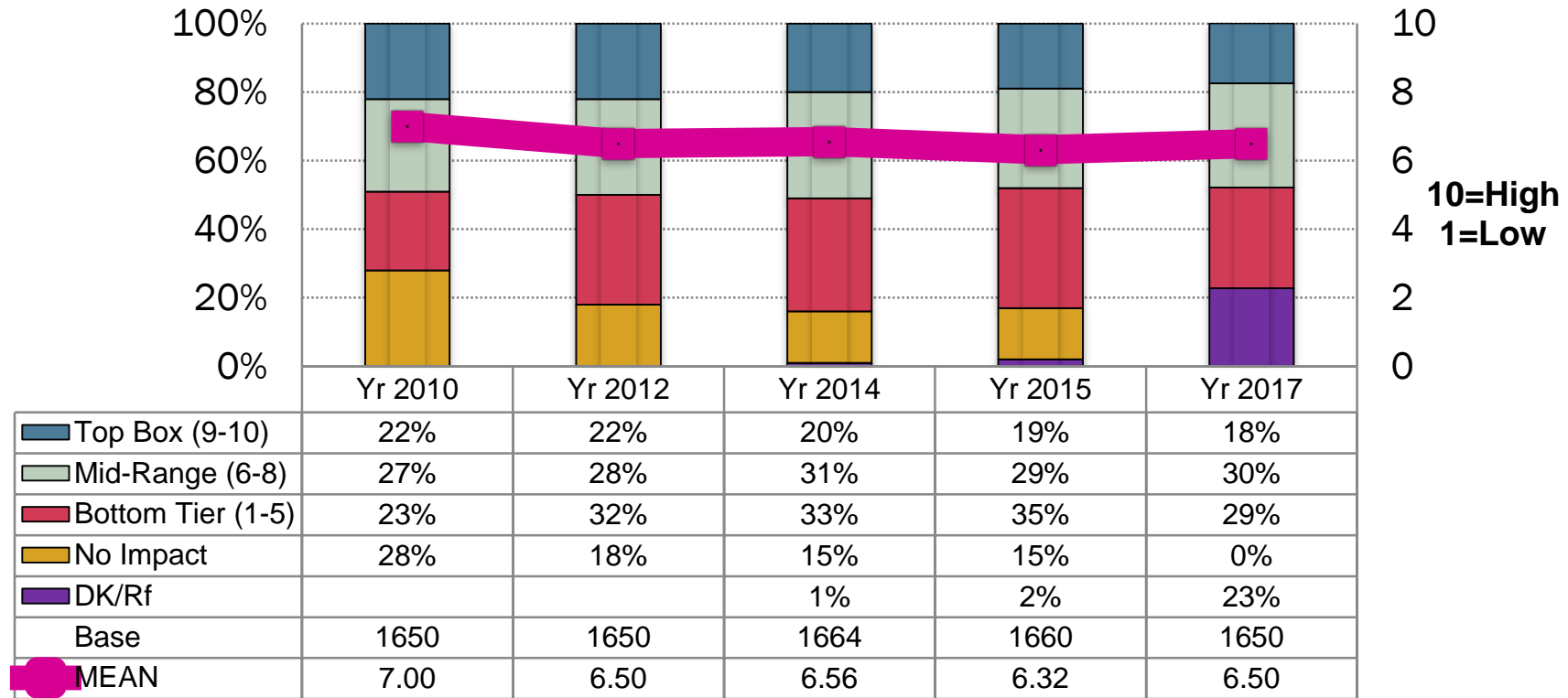
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on the State – *By Island*



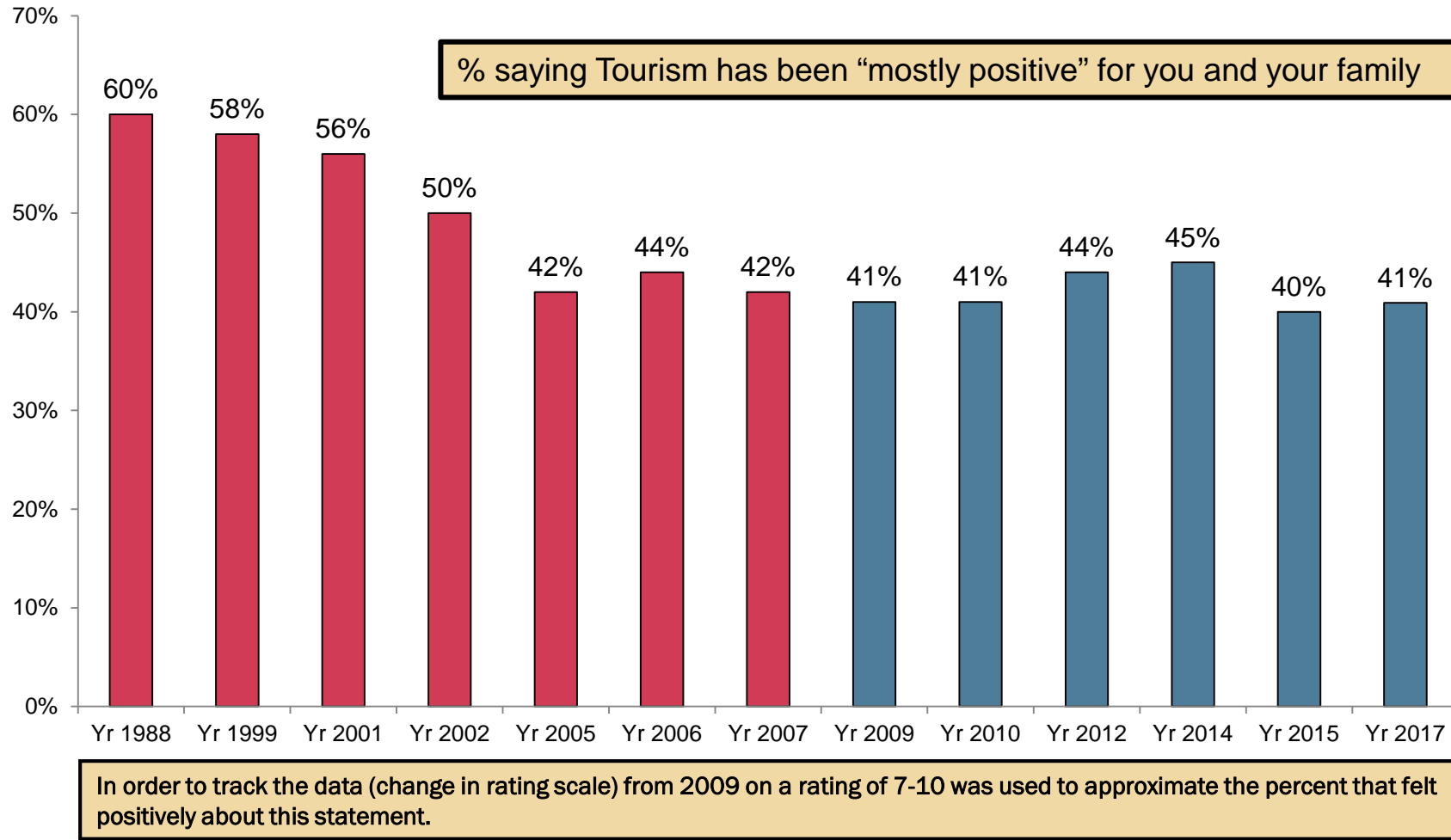
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...The State as a whole?

Impact of Tourism on You & Your Family - *Overall*



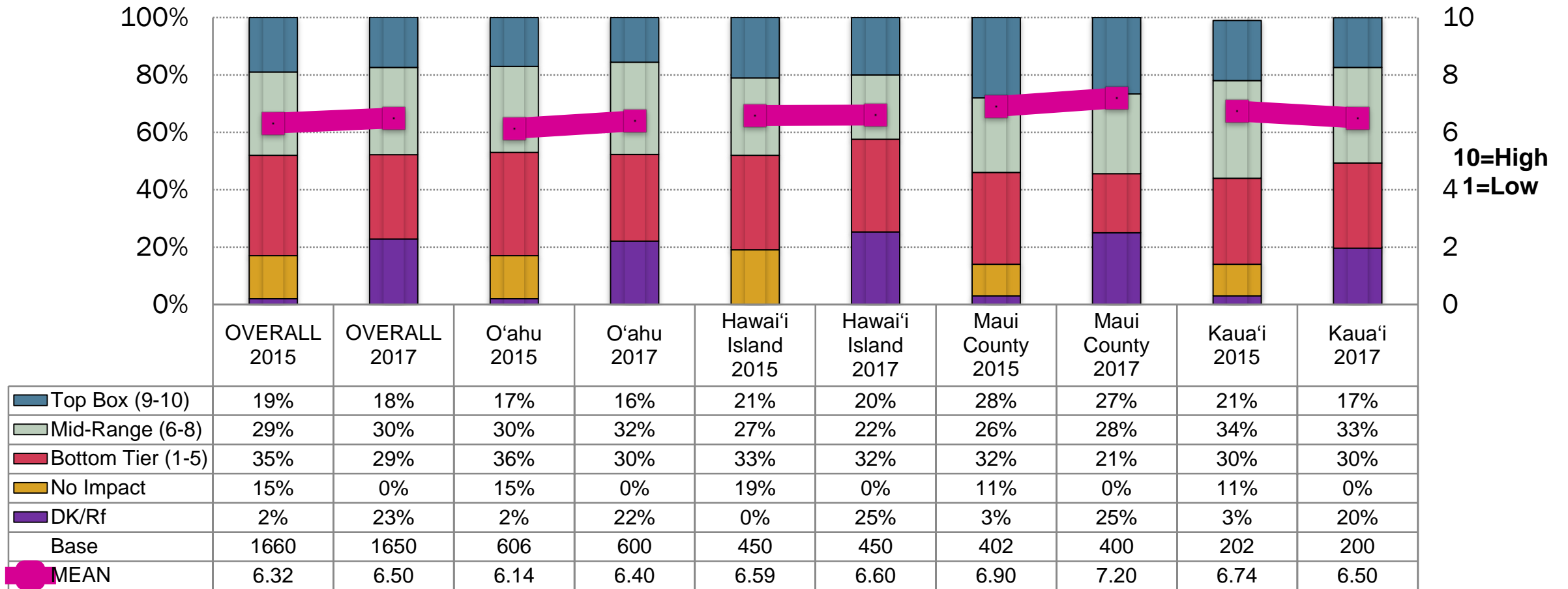
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family - *Overall*



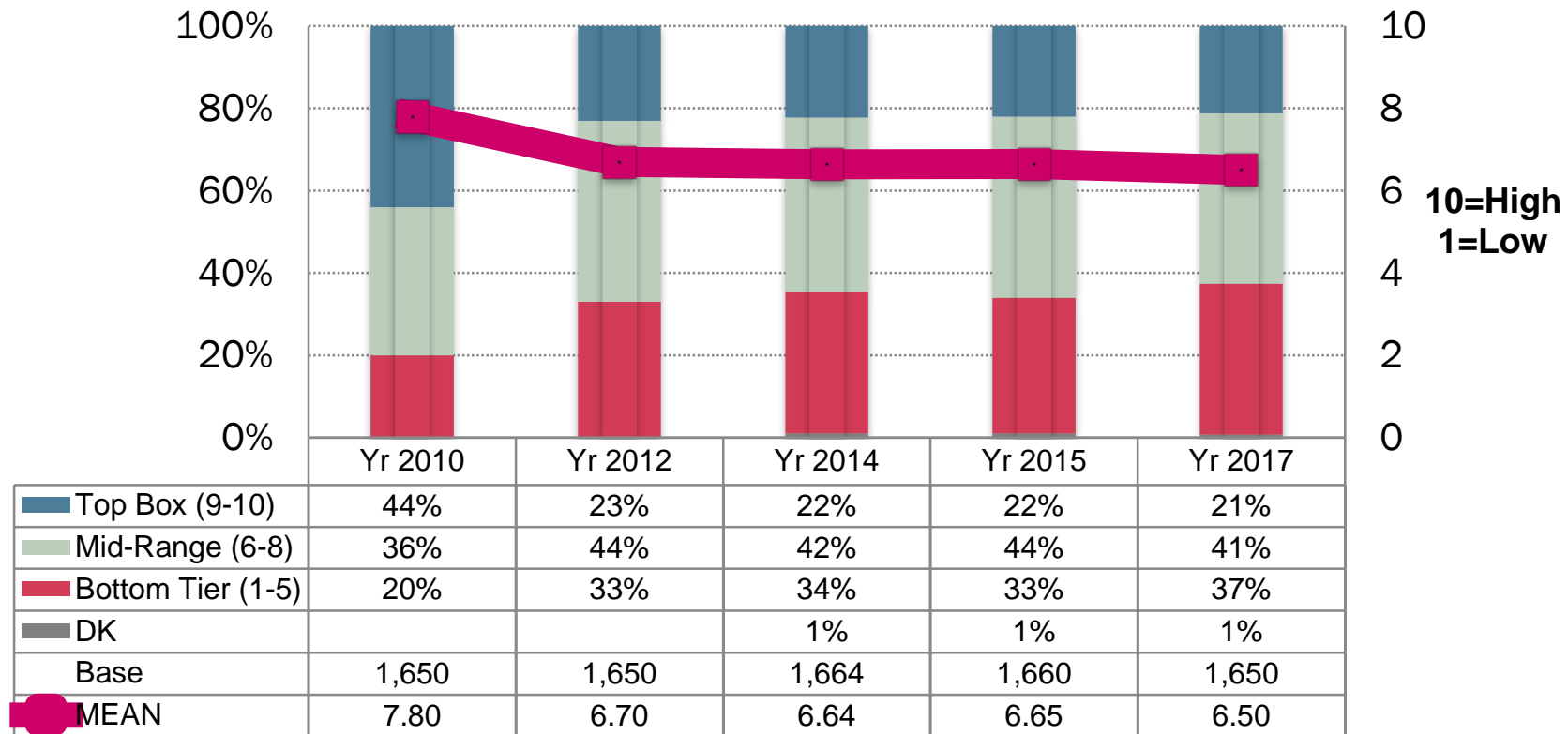
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

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



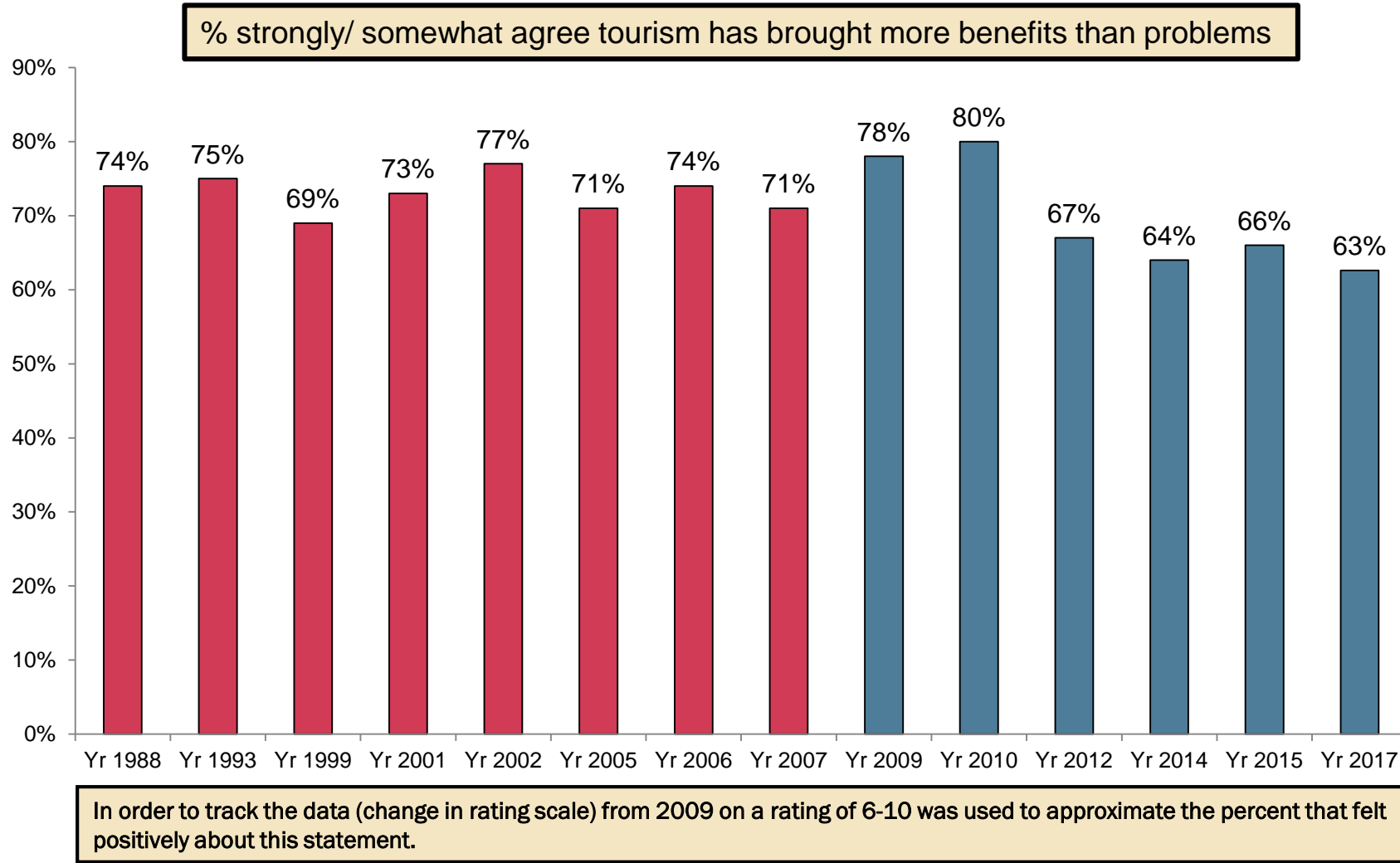
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

“Tourism has brought more benefits than problems” - *Overall*



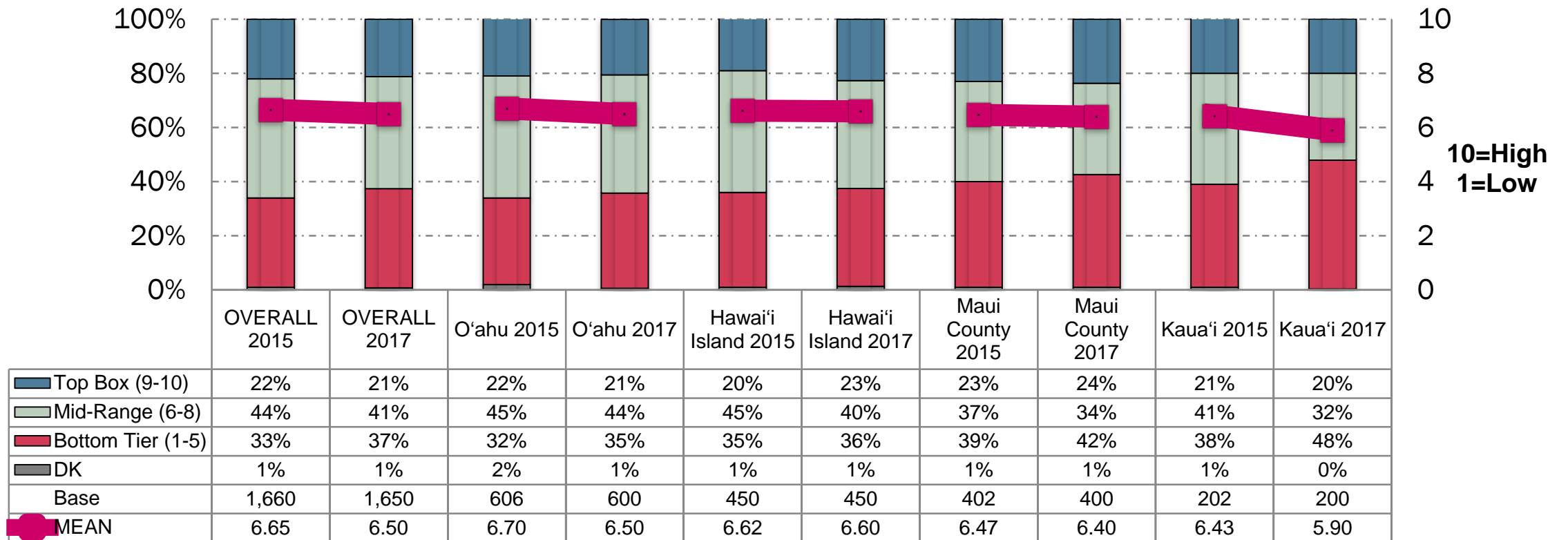
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism has brought more benefits than problems” - *Overall*



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

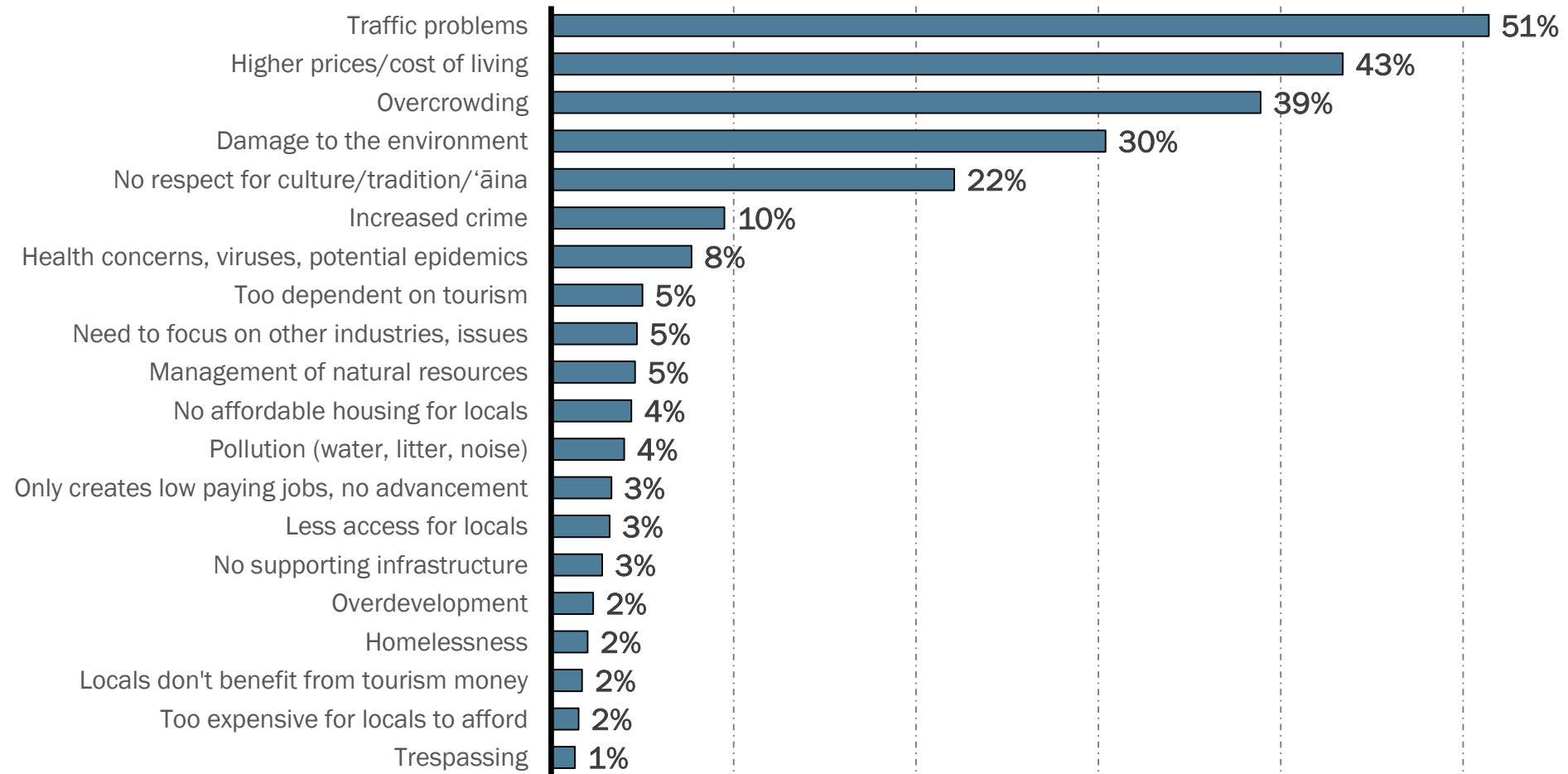
“Tourism has brought more benefits than problems” – *By Island*



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

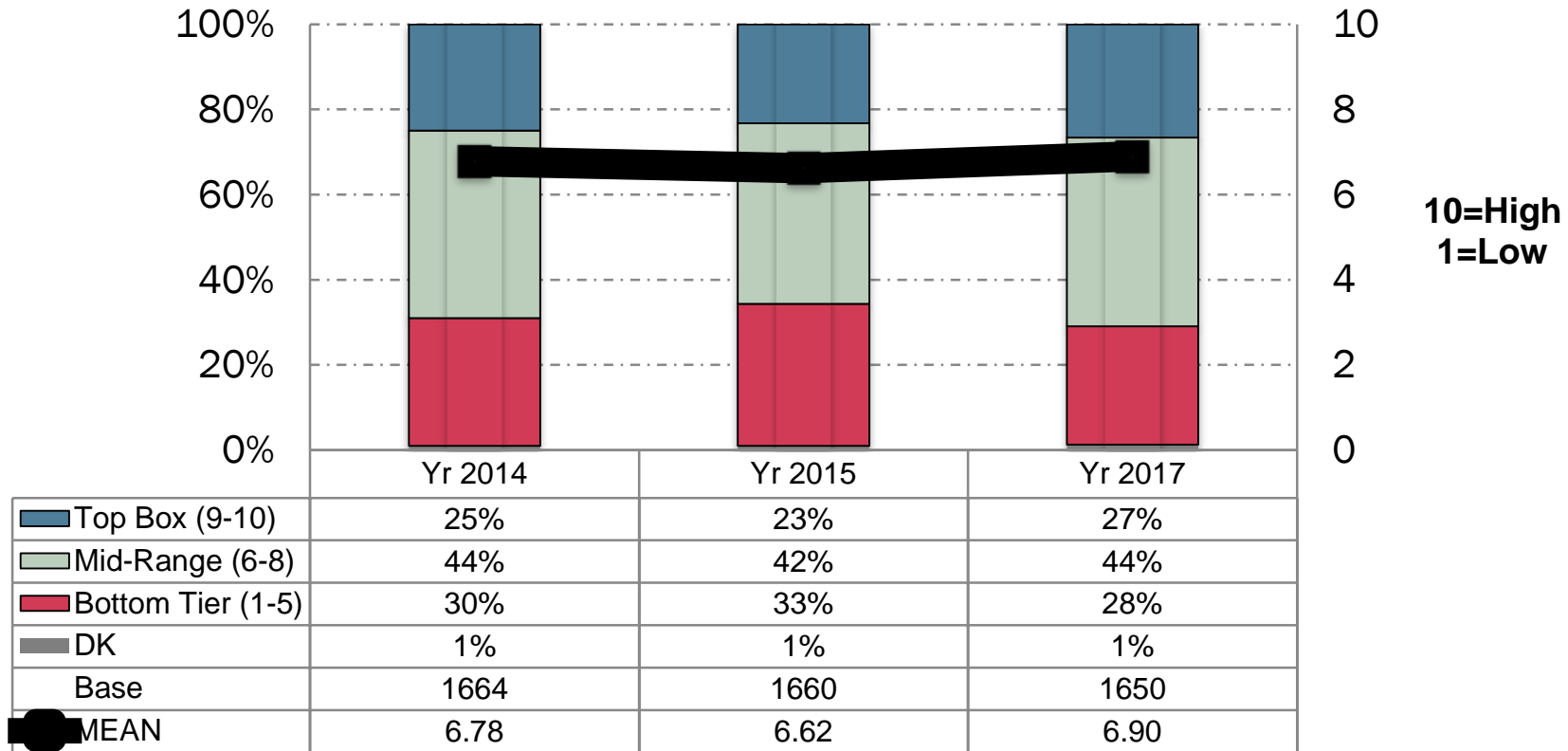
Problems Created by Tourism in Hawai'i

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



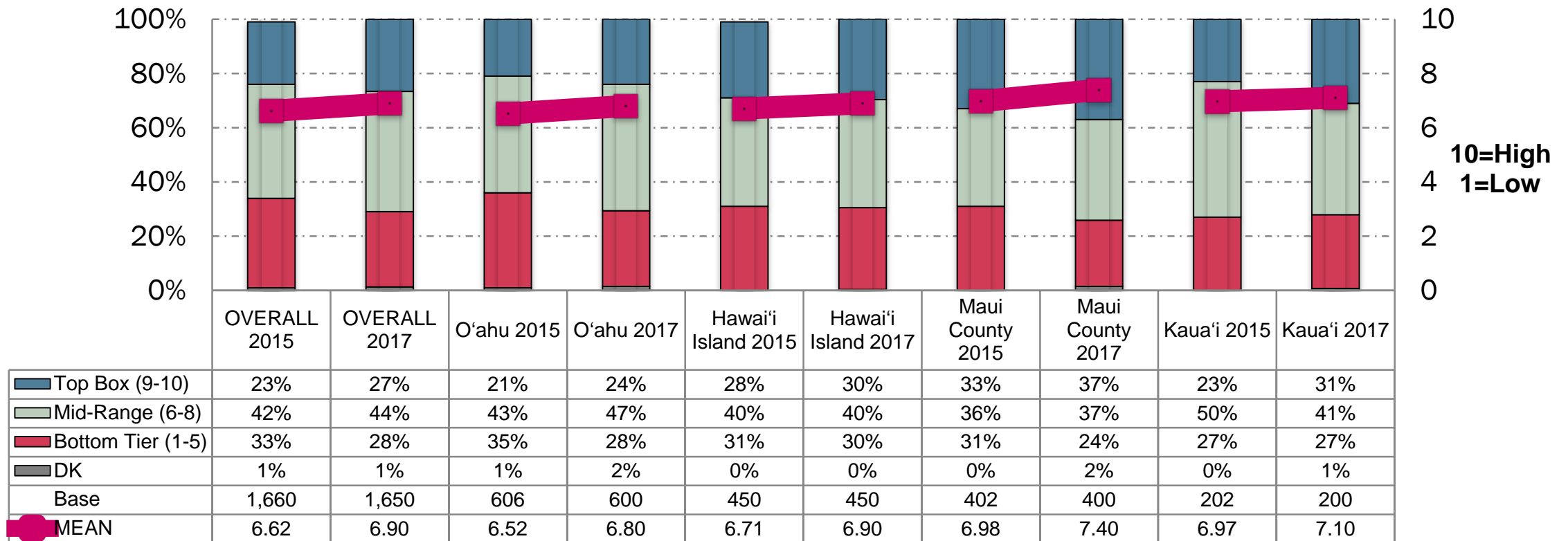
Q. In your opinion, what problems do you think tourism has created in Hawai'i?

“Creates many well paying jobs for residents” - *Overall*



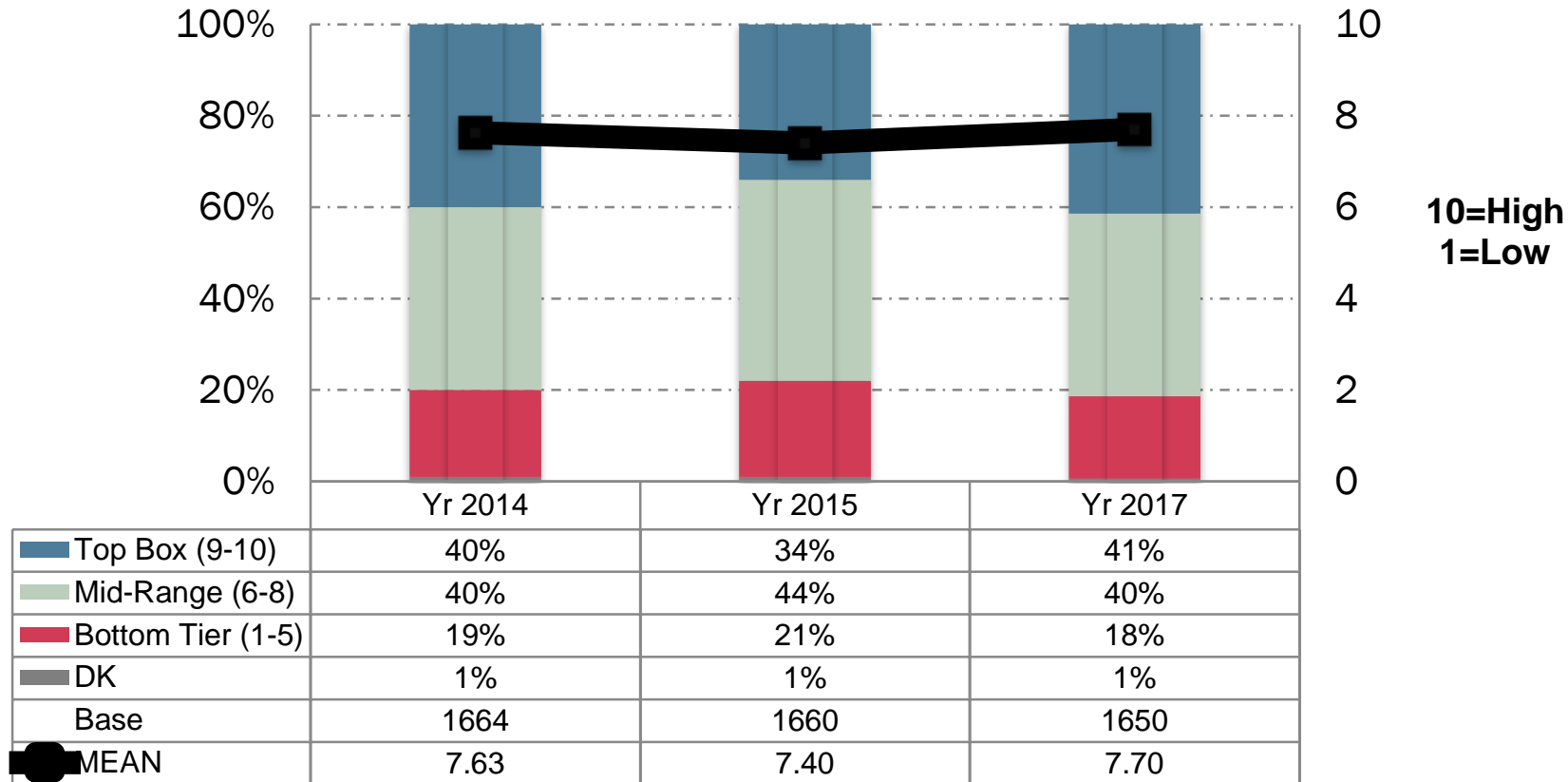
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates many well paying jobs for residents” – *By Island*



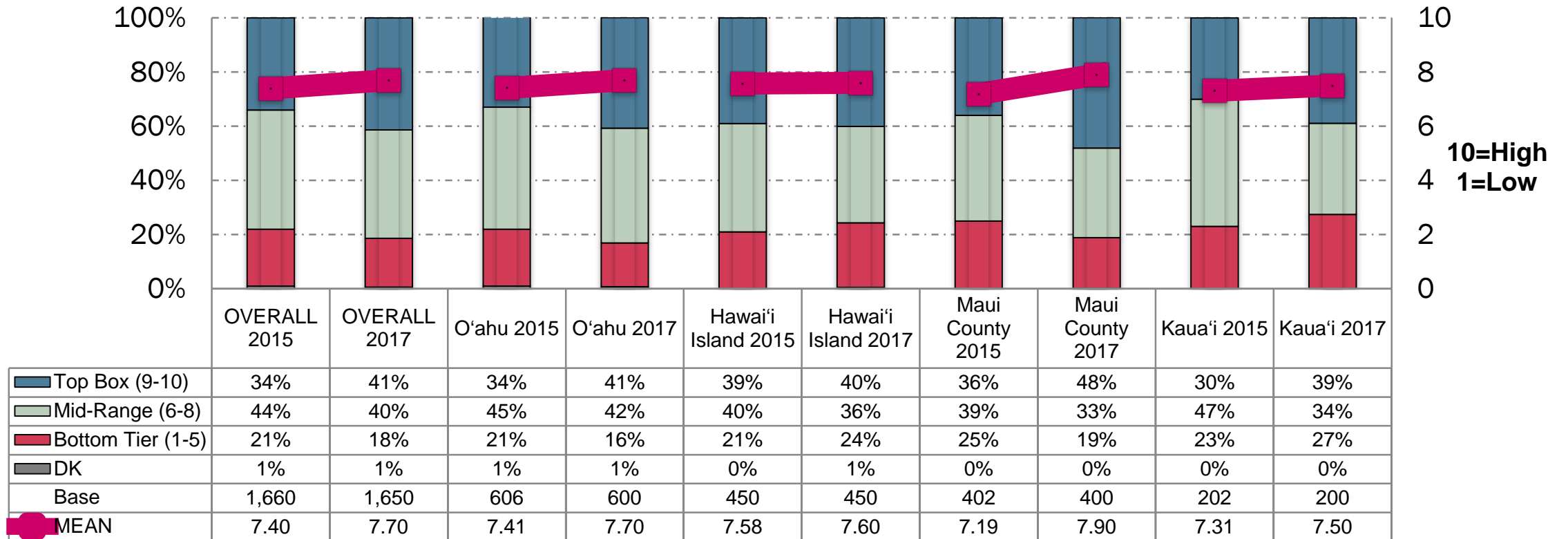
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates shopping, restaurants, and entertainment opportunities for residents” - *Overall*



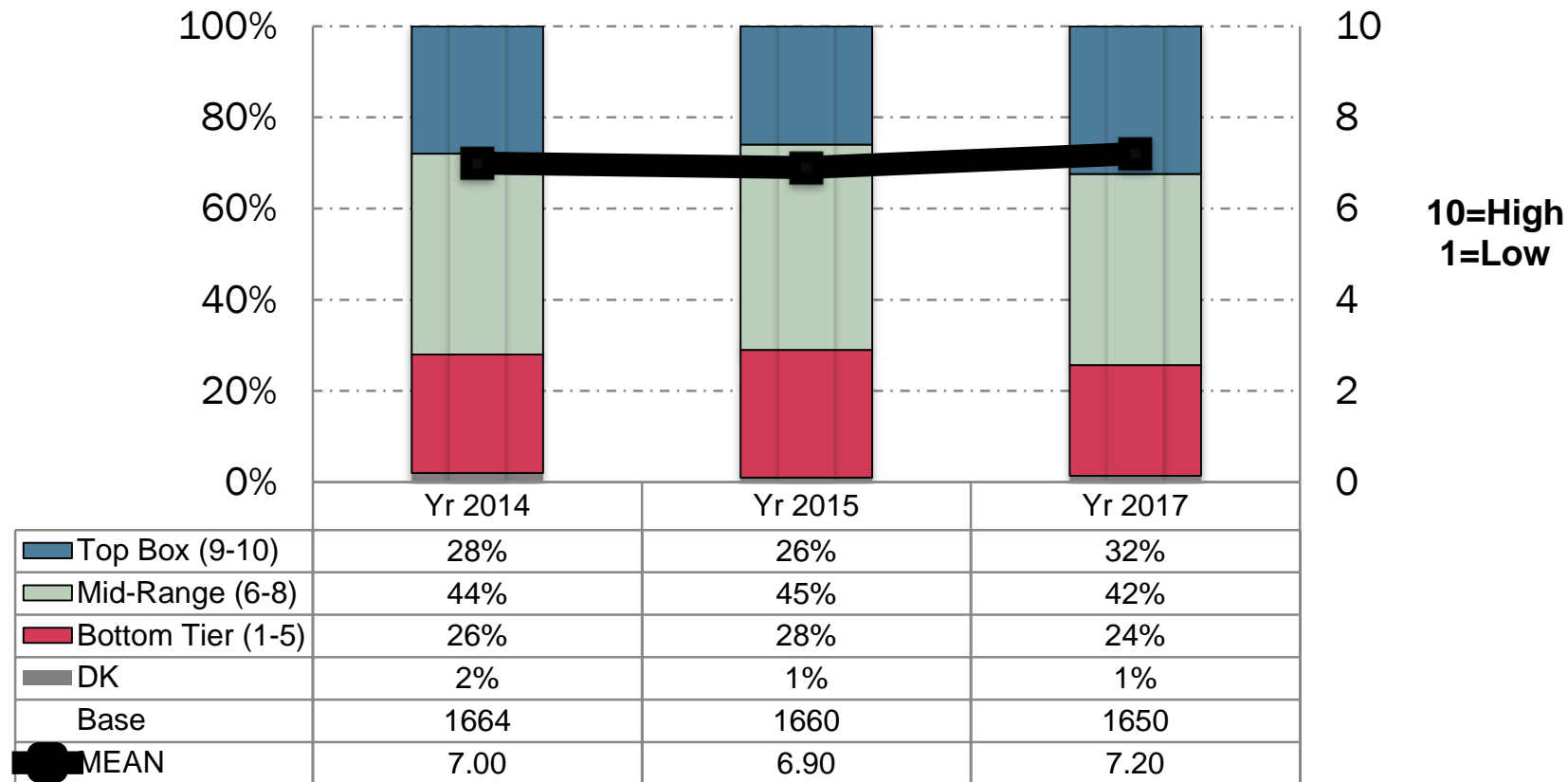
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates shopping, restaurants, and entertainment opportunities for residents” – *By Island*



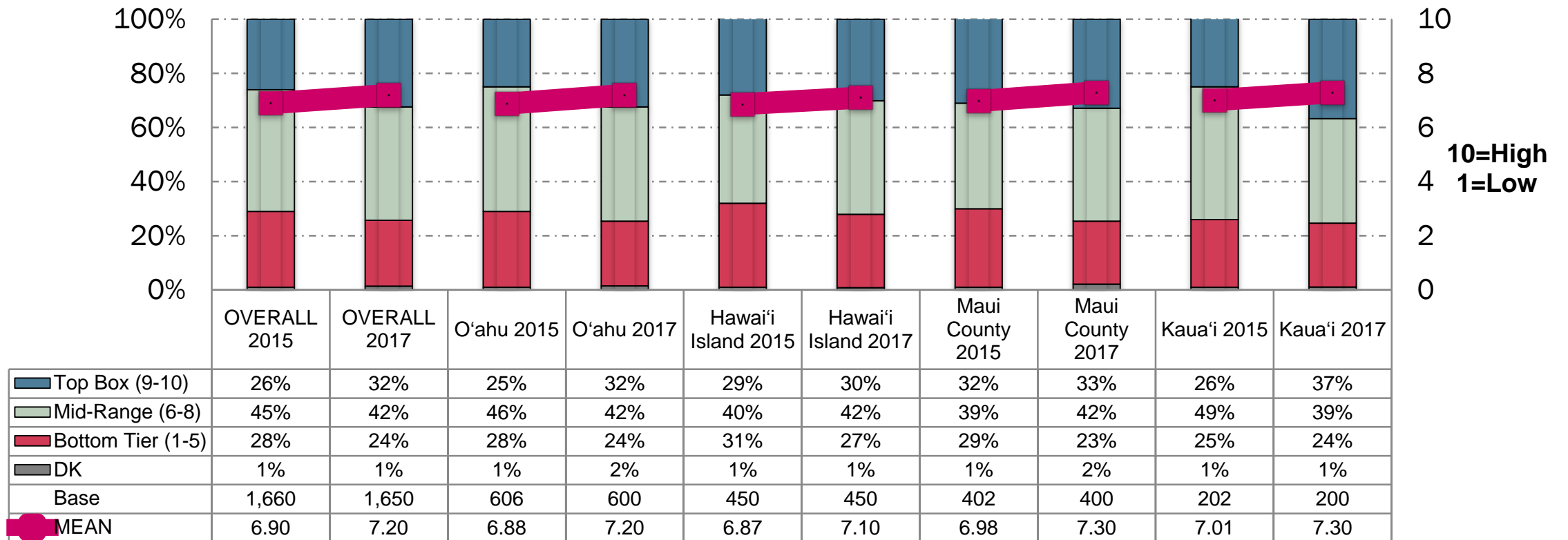
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Creates jobs that have opportunities for advancement” - *Overall*



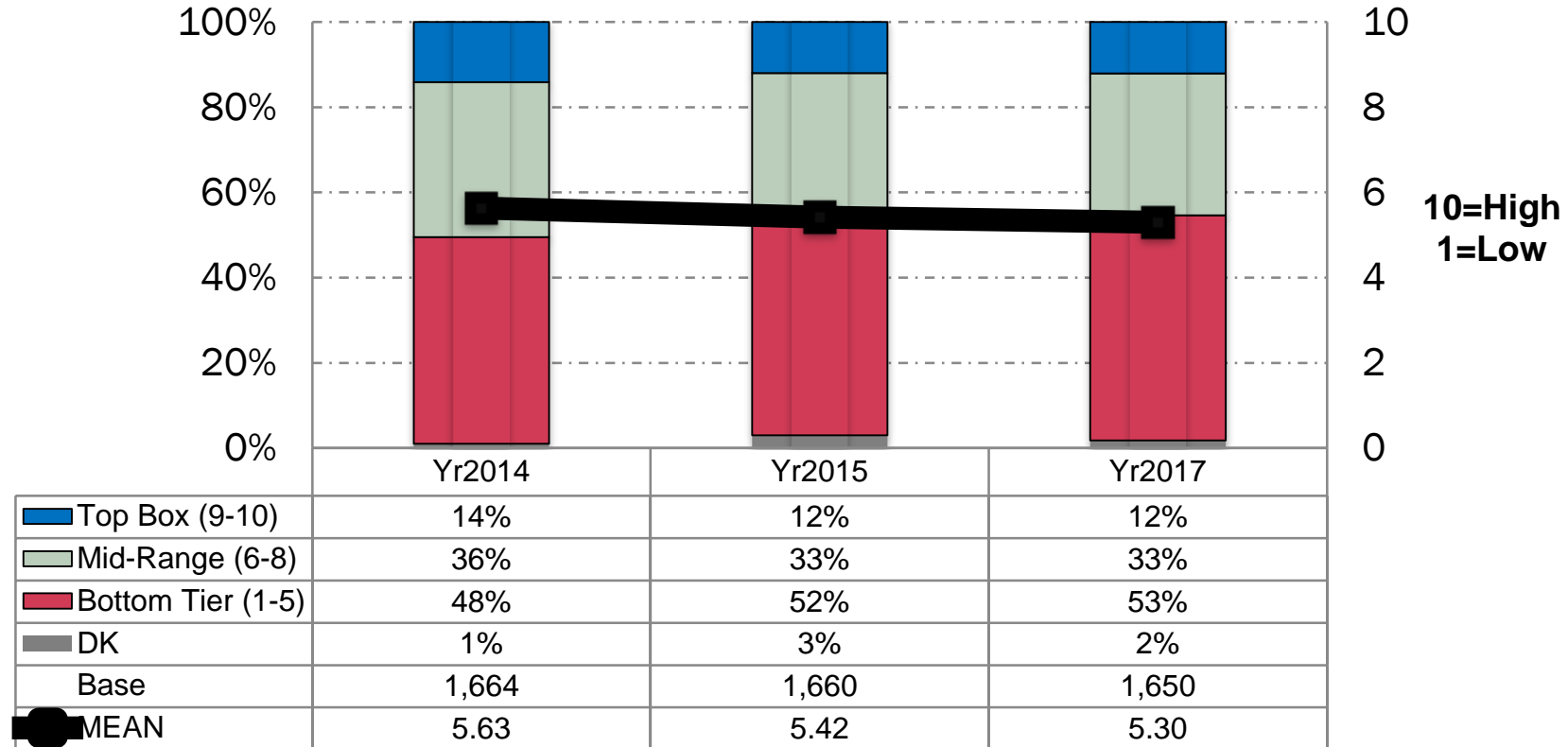
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Creates jobs that have opportunities for advancement” – *By Island*



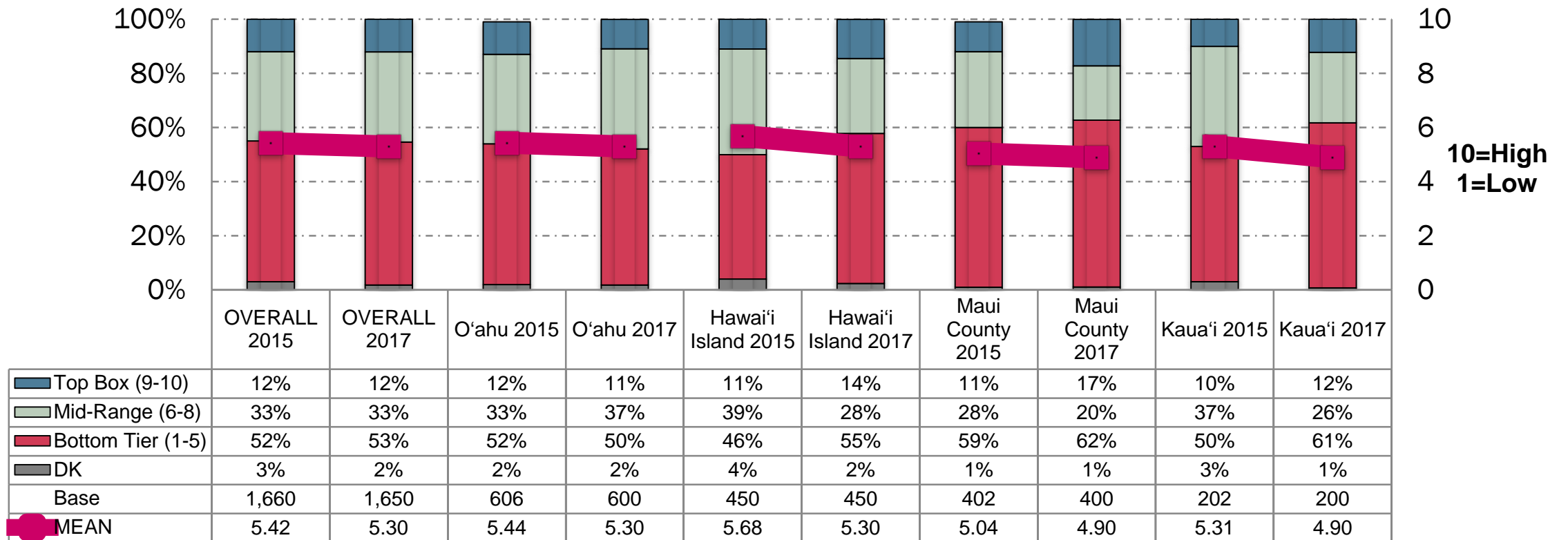
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Helps preserve Native Hawaiian culture and language” - *Overall*



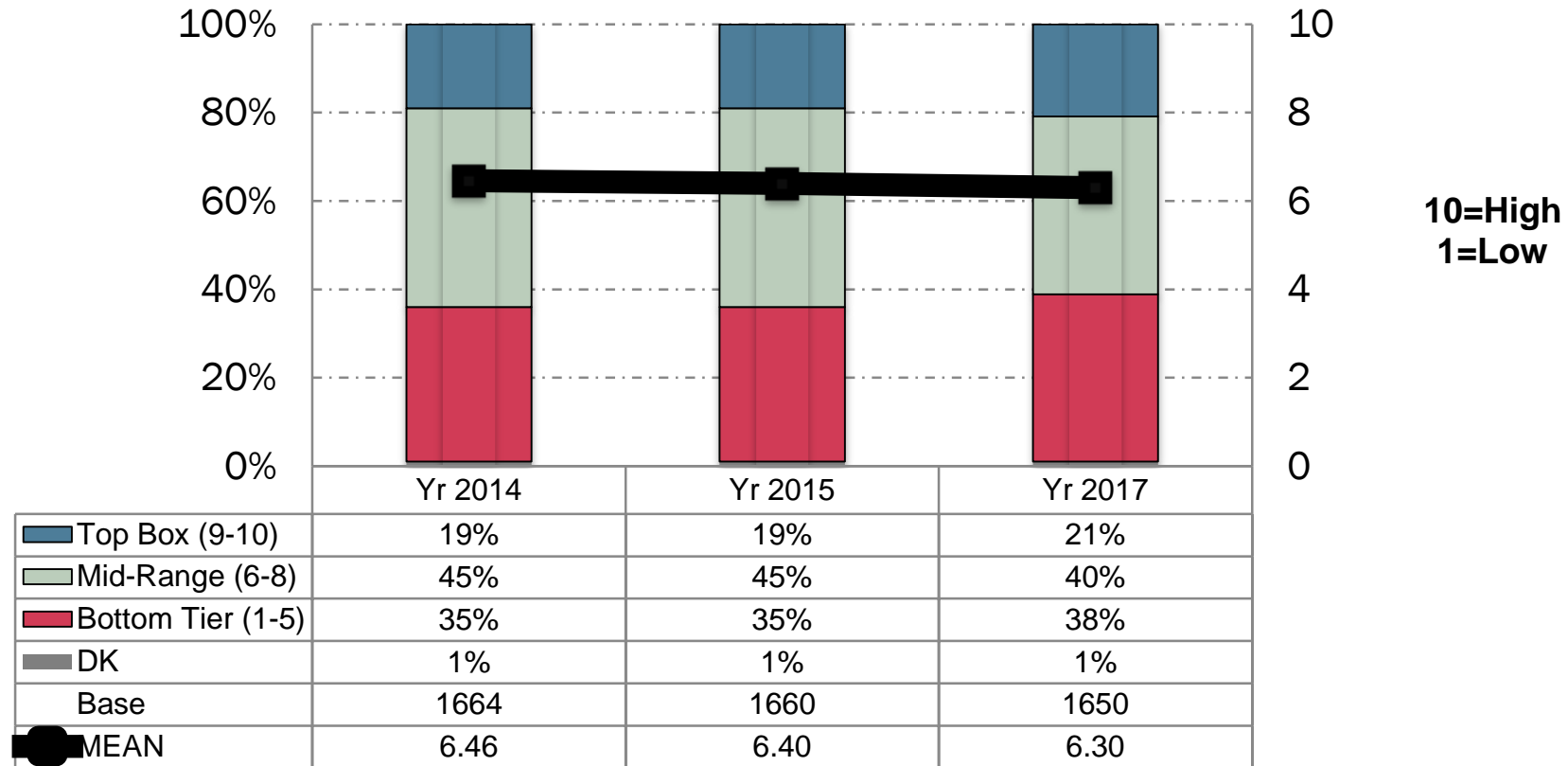
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Helps preserve Native Hawaiian culture and language” – *By Island*



Q. 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...?

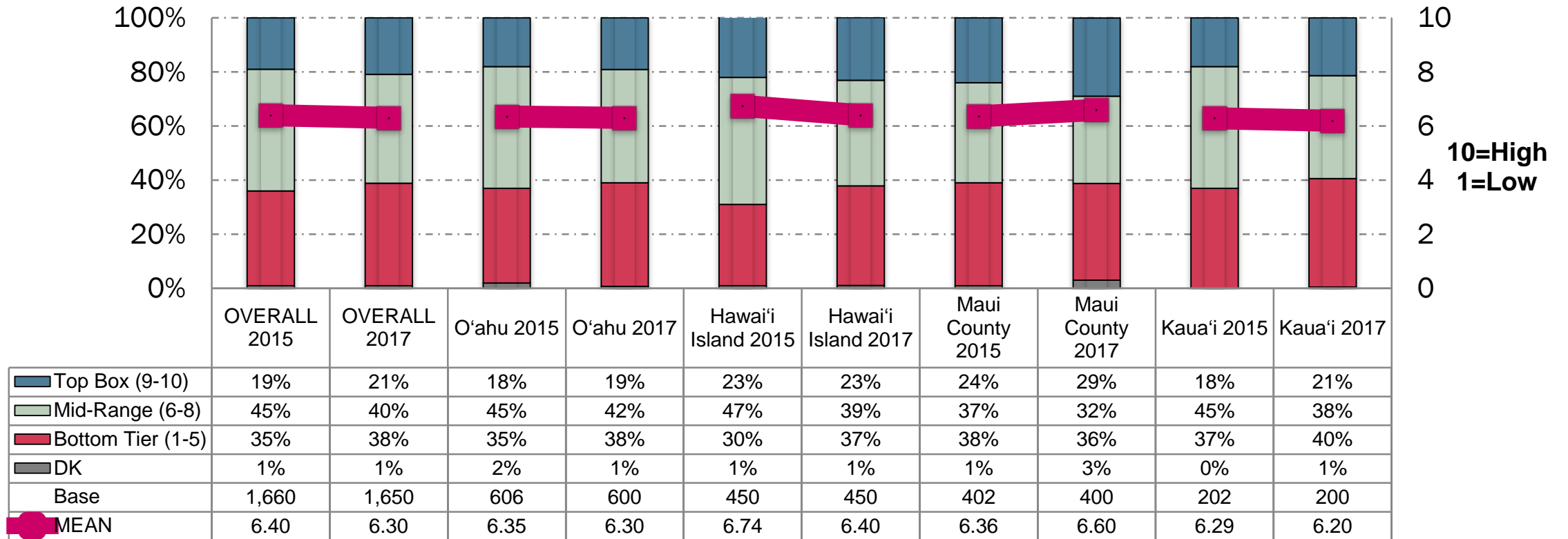
“Is an industry that enhances residents’ quality of life” - *Overall*



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

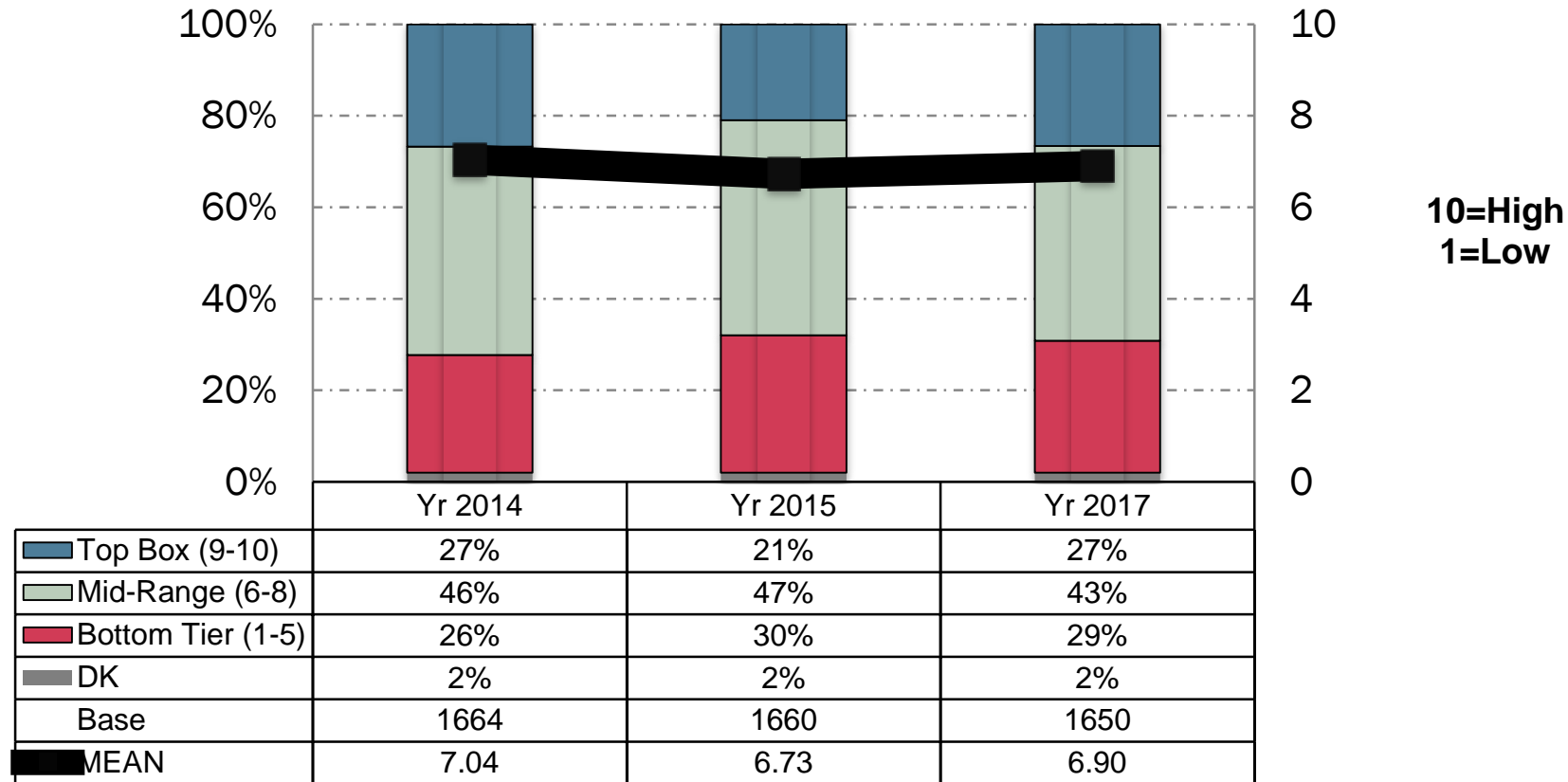
“Is an industry that enhances residents’ quality of life”

– *By Island*



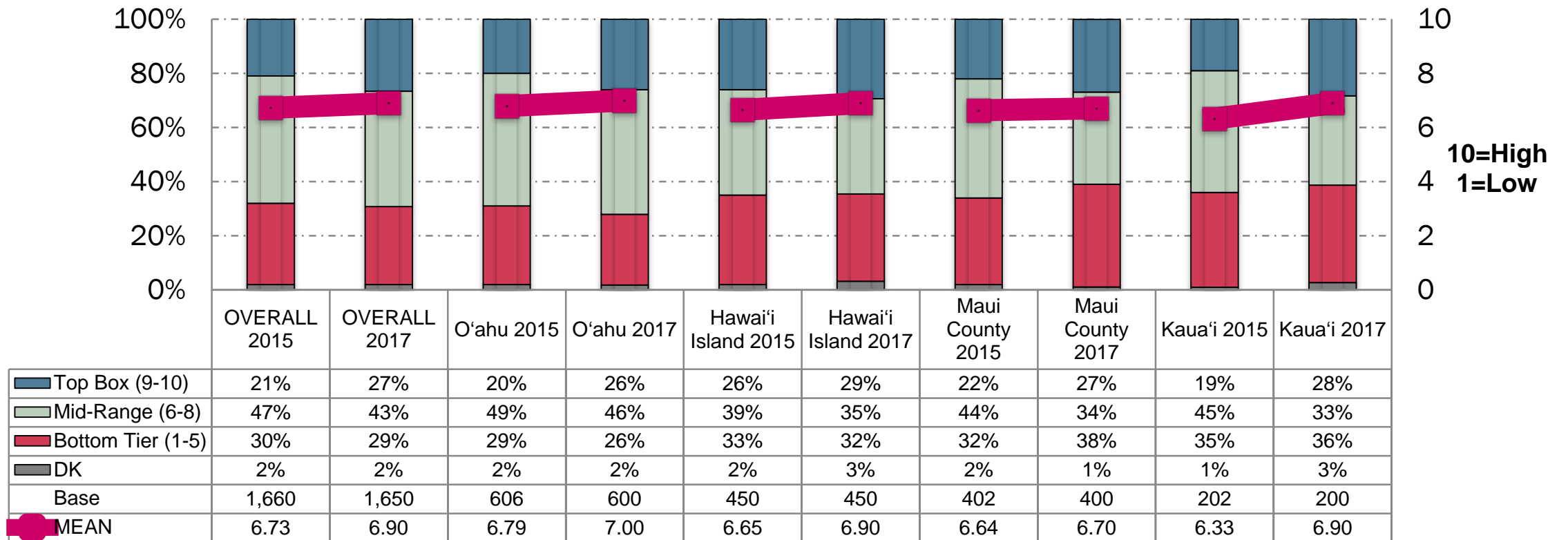
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Sponsors festivals, activities, & sports events for residents & visitors” - *Overall*



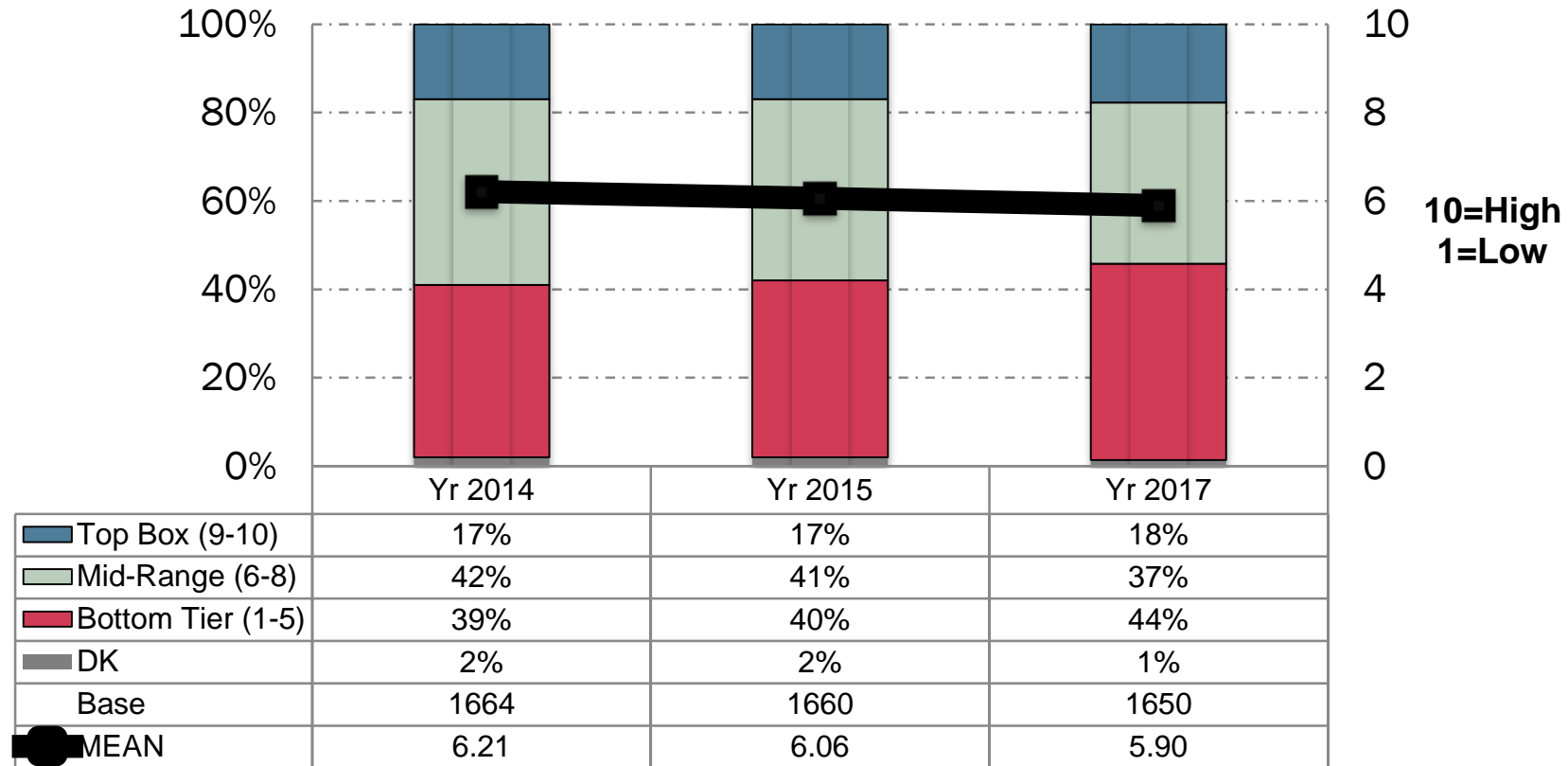
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Sponsors festivals, activities, & sports events for residents & visitors” – *By Island*



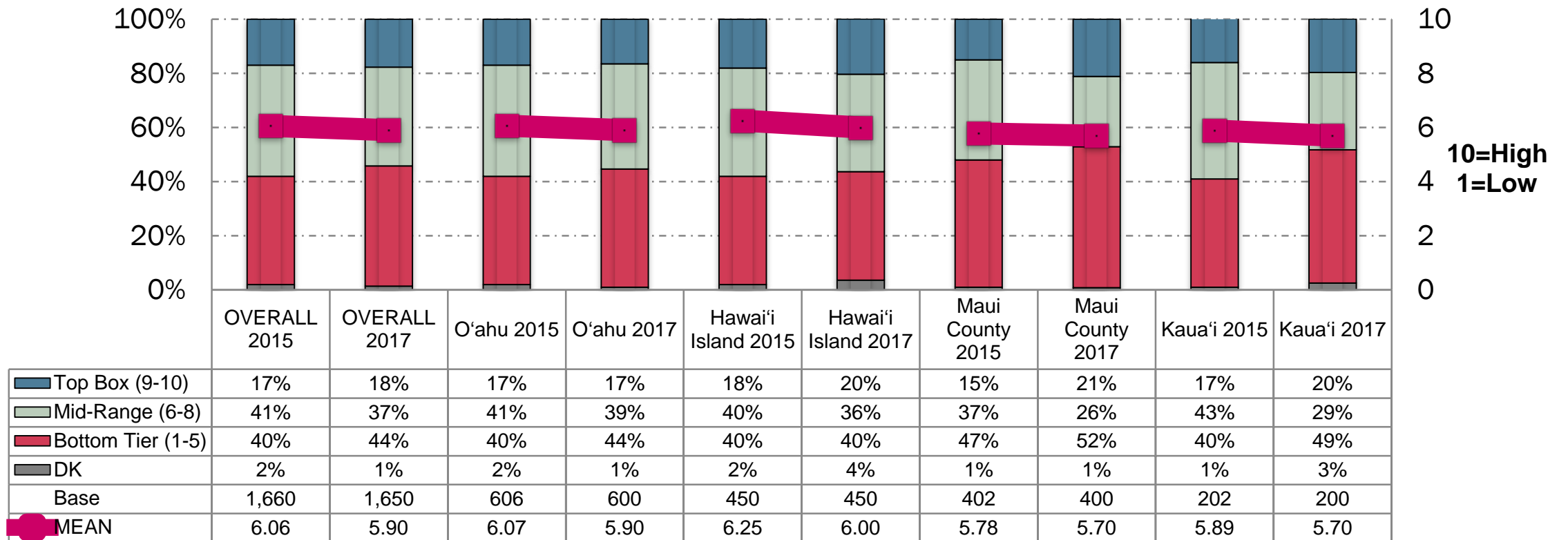
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Helps sustain Hawai'i's natural resources, parks, and cultural sites” - *Overall*



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

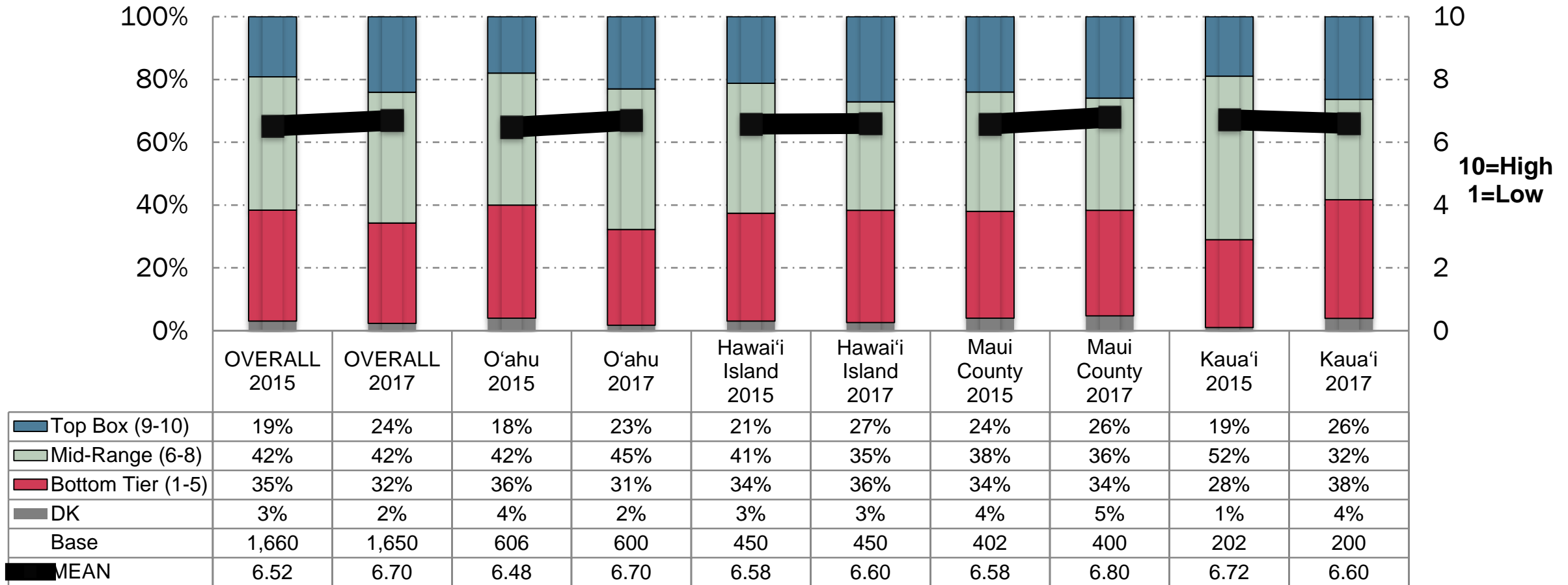
“Helps sustain Hawai‘i’s natural resources, parks, and cultural sites” – *By Island*



Q. 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...?

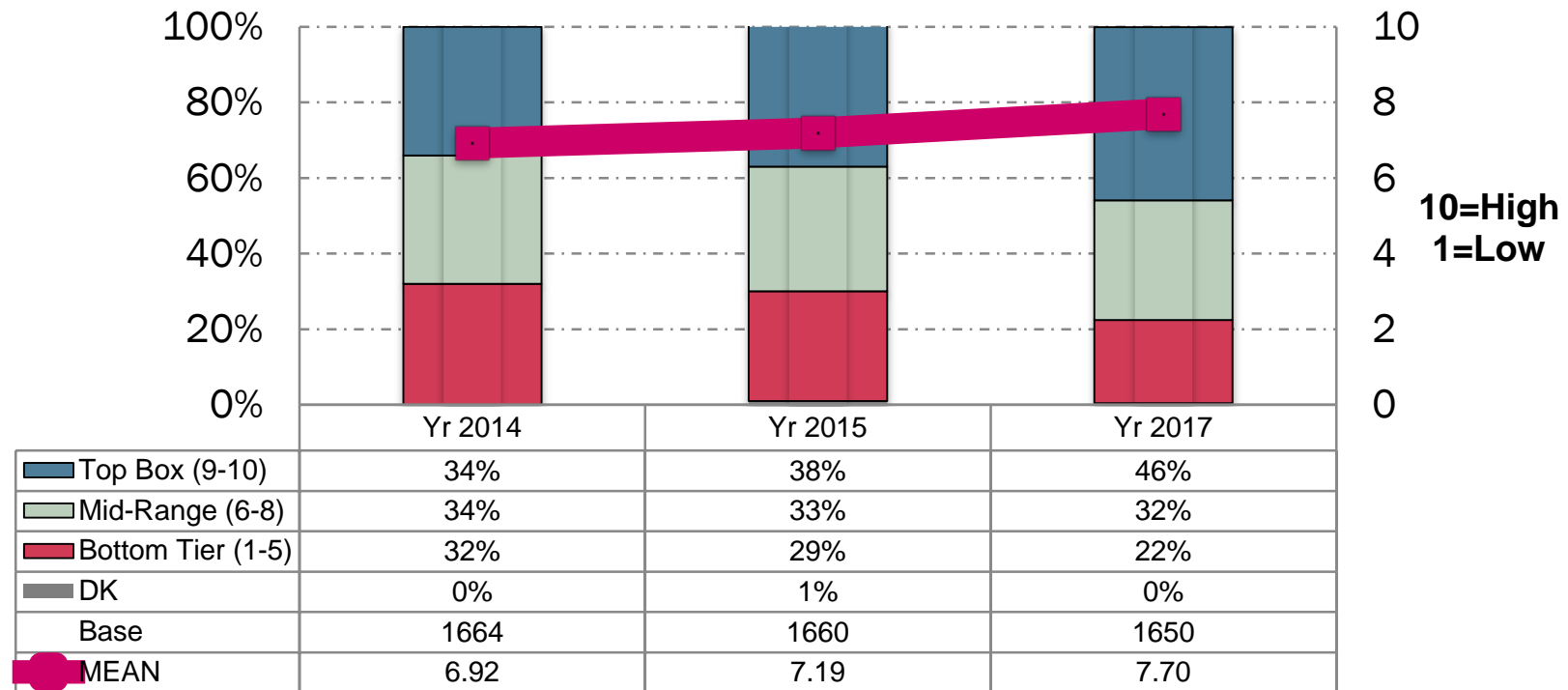
“Provides opportunities for residents to be involved”

By Island



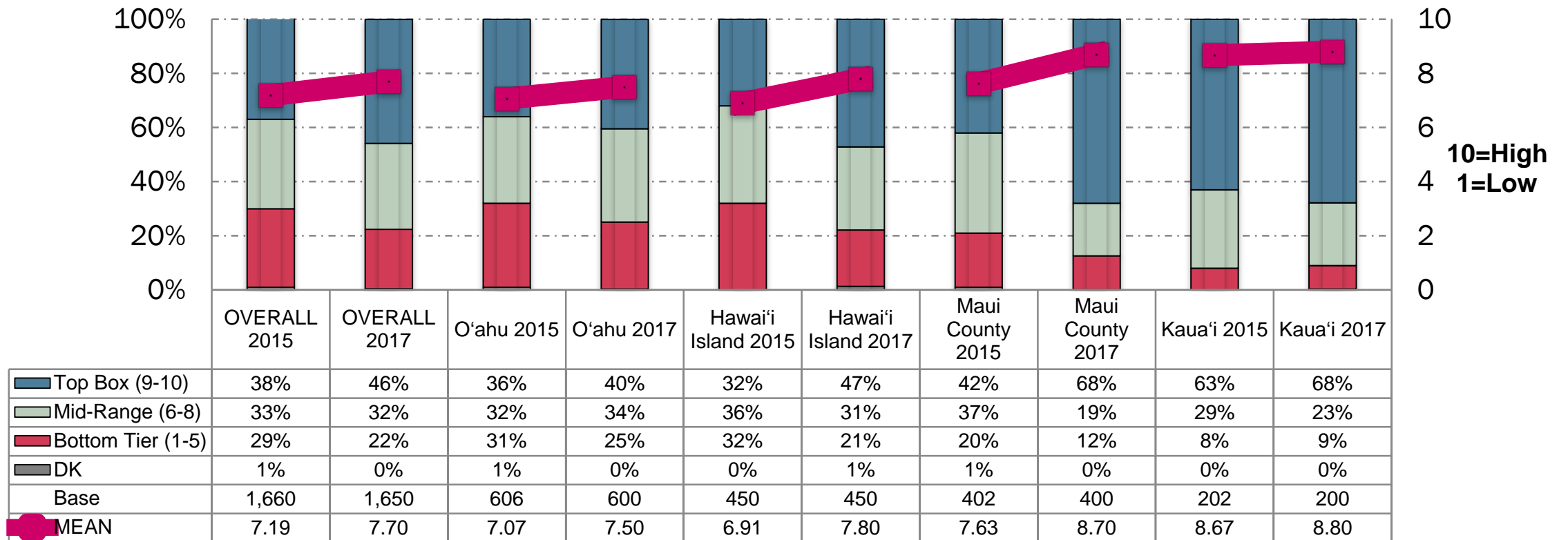
Q. I'm going to read you some ways tourism may affect your island, please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 being Do Not Agree At All?

“Tourism in Hawai'i increases traffic problems” - *Overall*



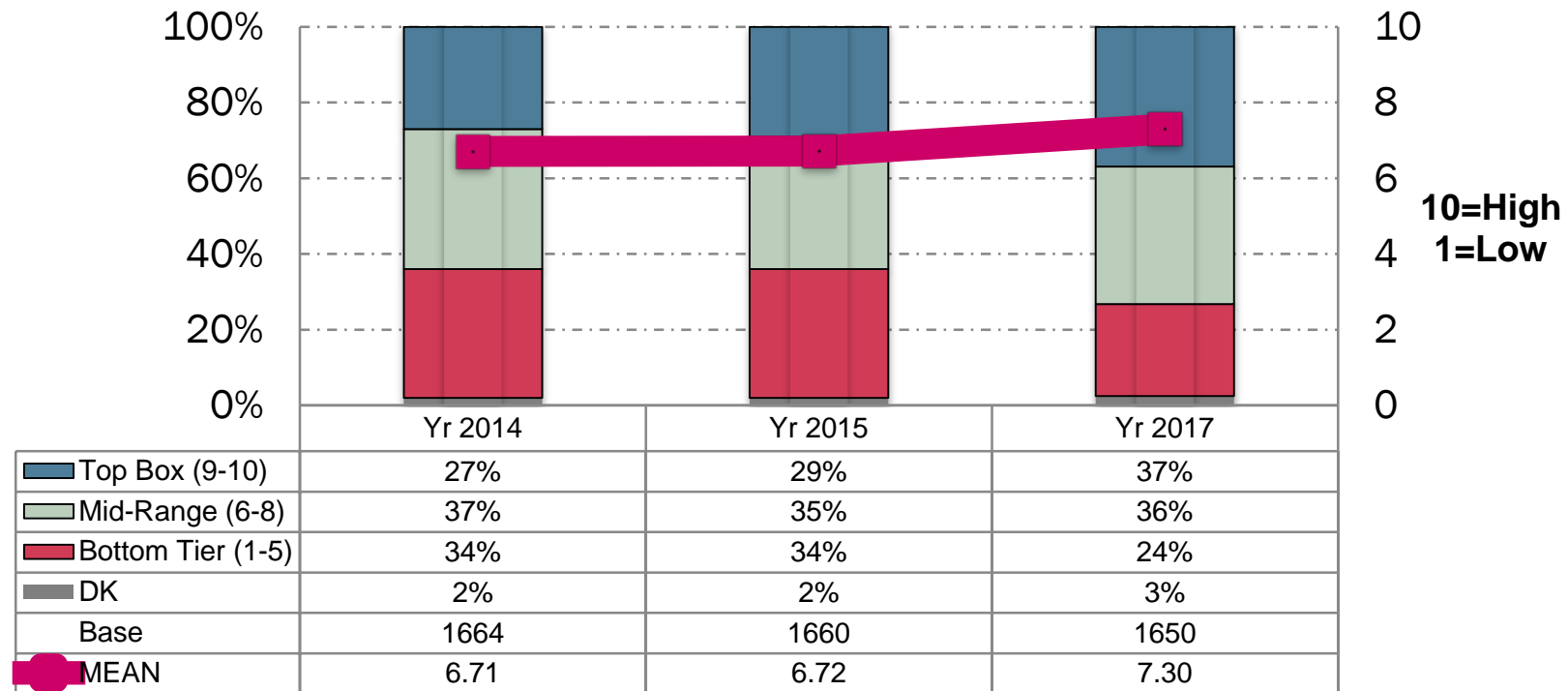
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism in Hawai'i increases traffic problems” – *By Island*



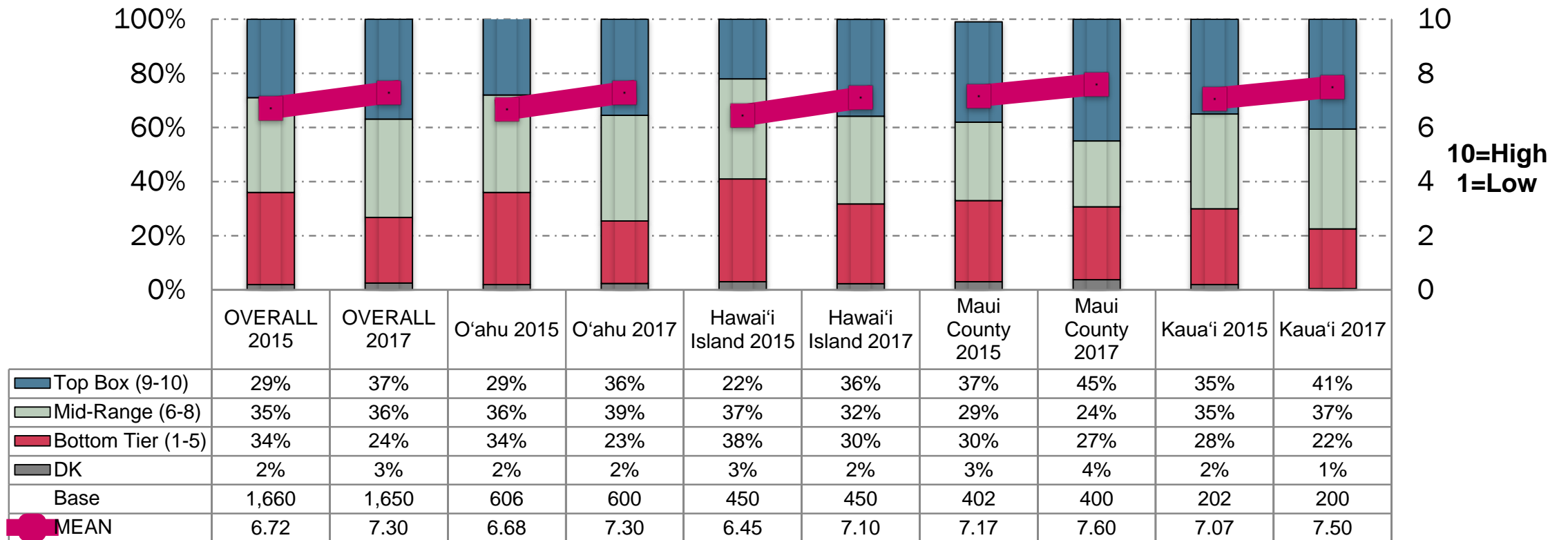
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism results in a higher cost of living” - *Overall*



Q. 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 results in a higher cost of living” – *By Island*

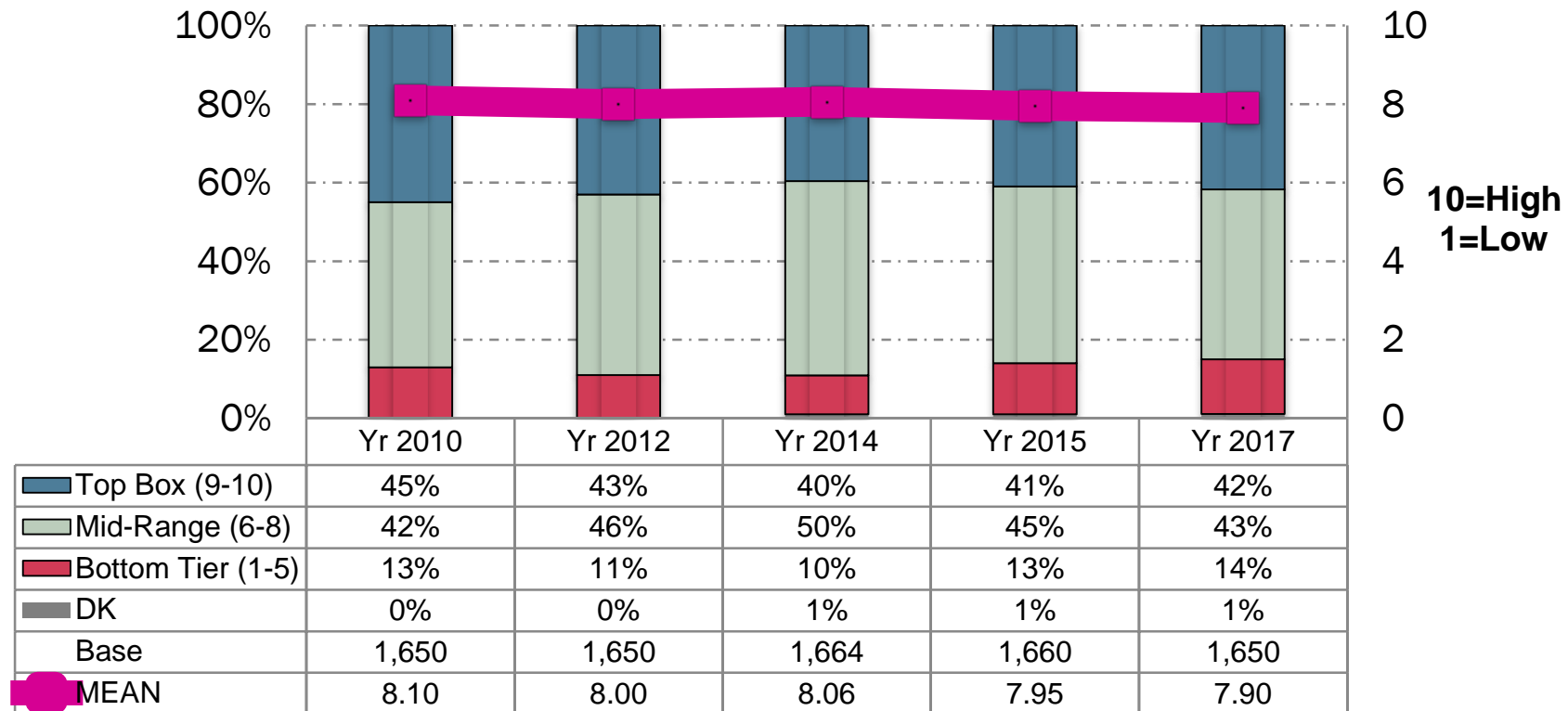


Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?



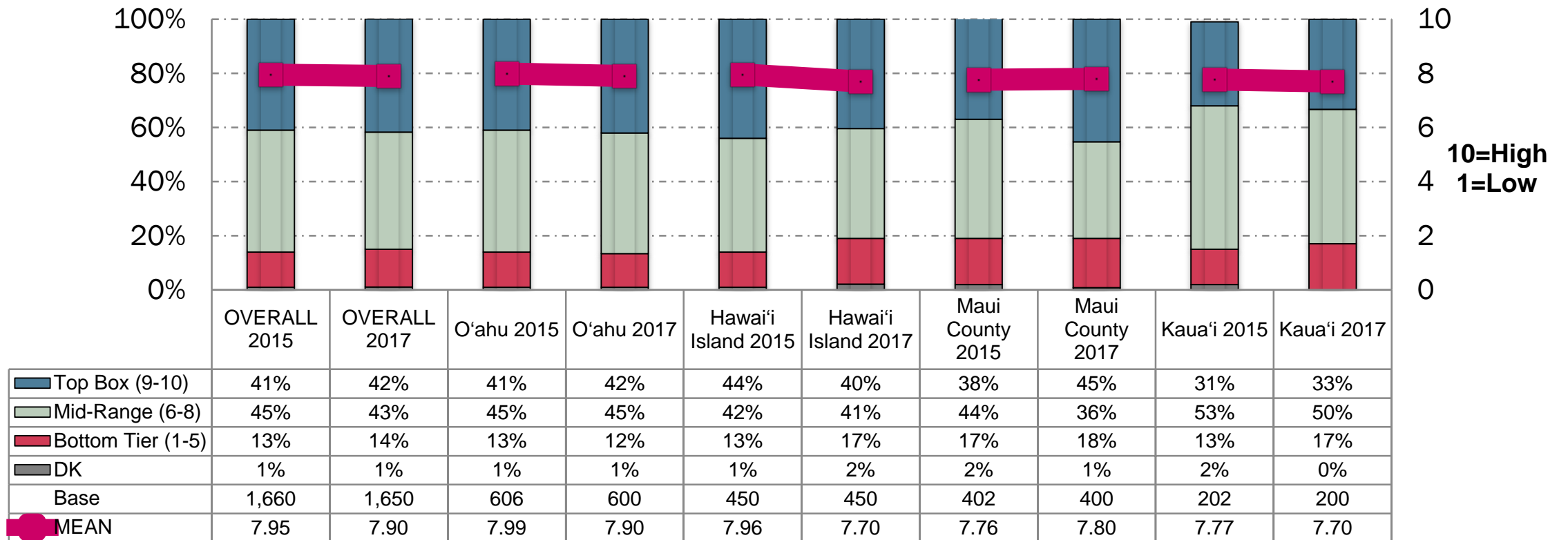
General Perceptions of the Visitor Industry

Perception of Tourism Industry in Hawai'i - *Overall*



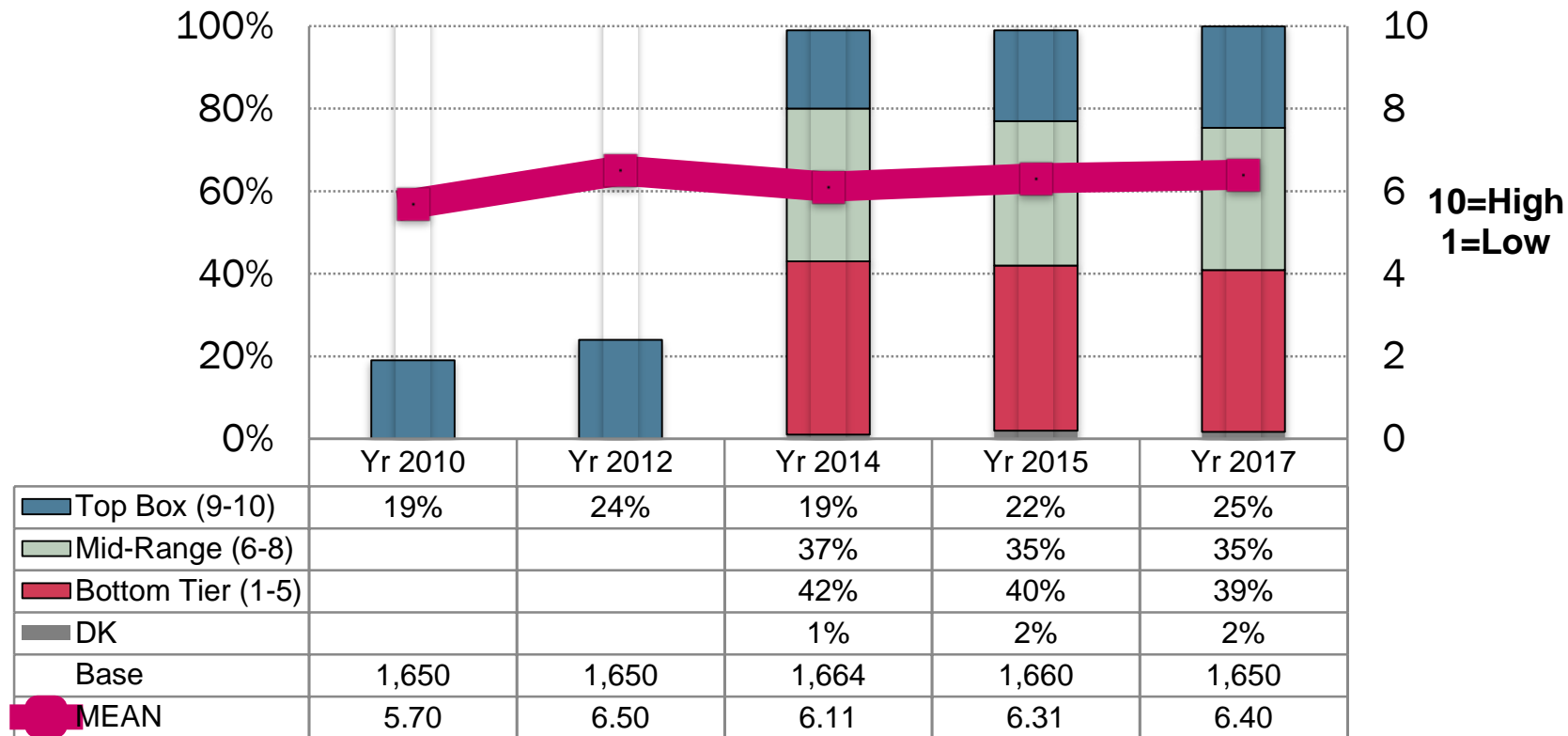
Q. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

Perception of Tourism Industry in Hawai'i- *By Island*



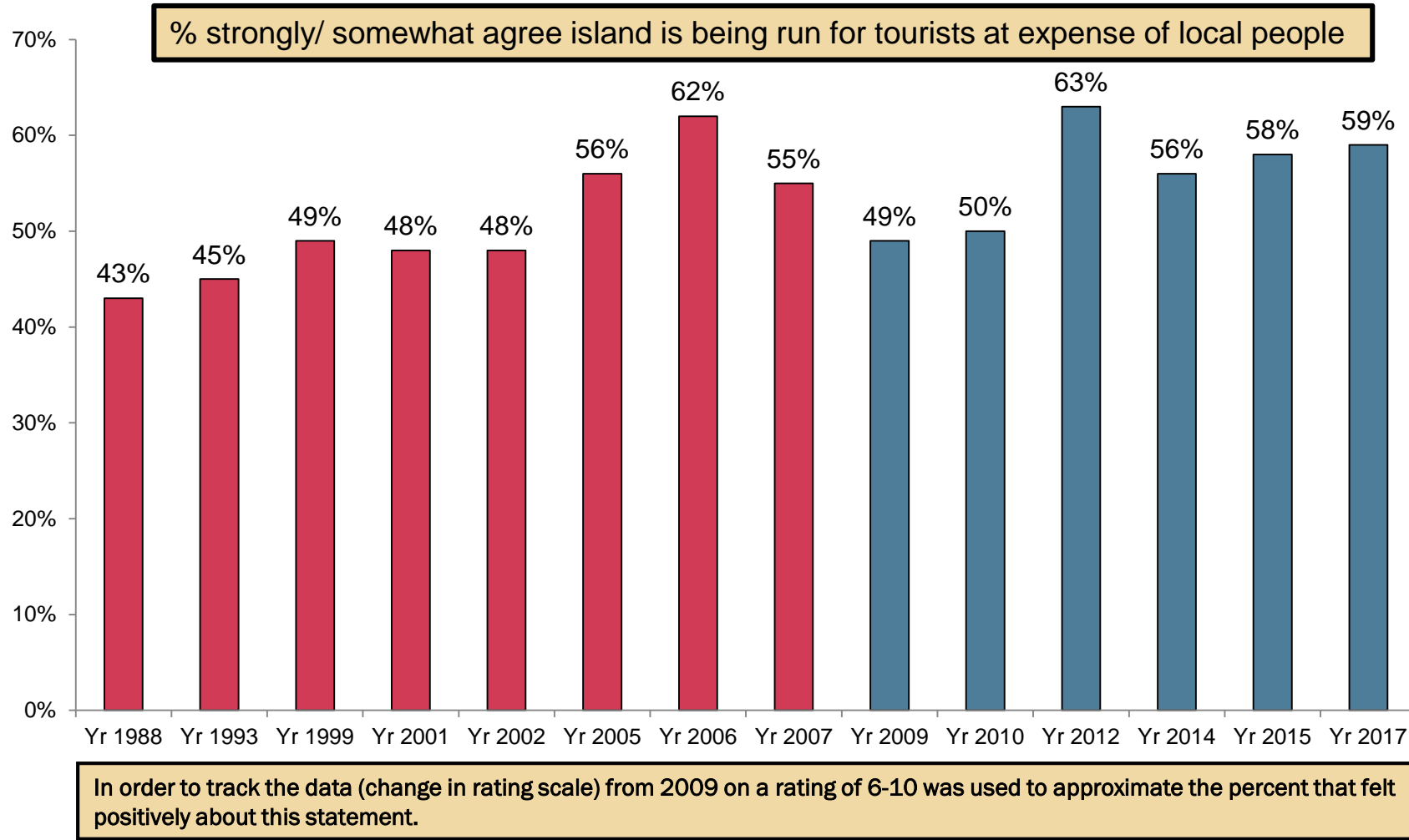
Q. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of Tourism as an industry in Hawai'i?

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



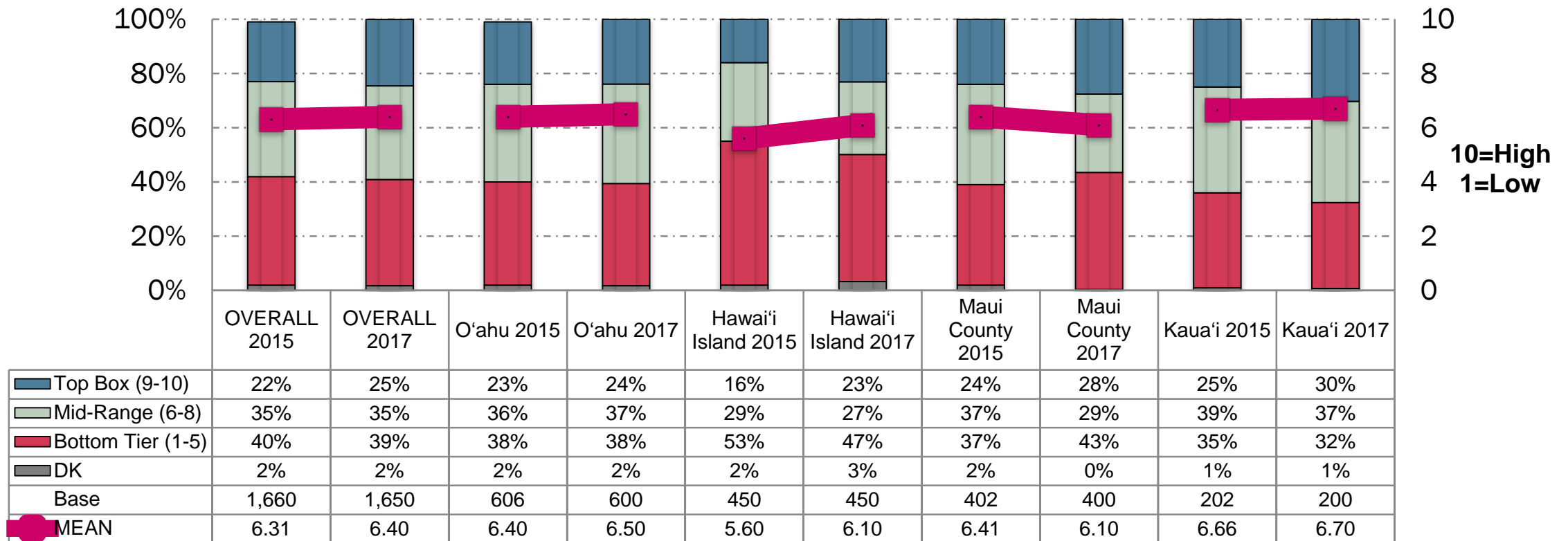
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“This island is being run for tourists at the expense of local people” - *Overall*



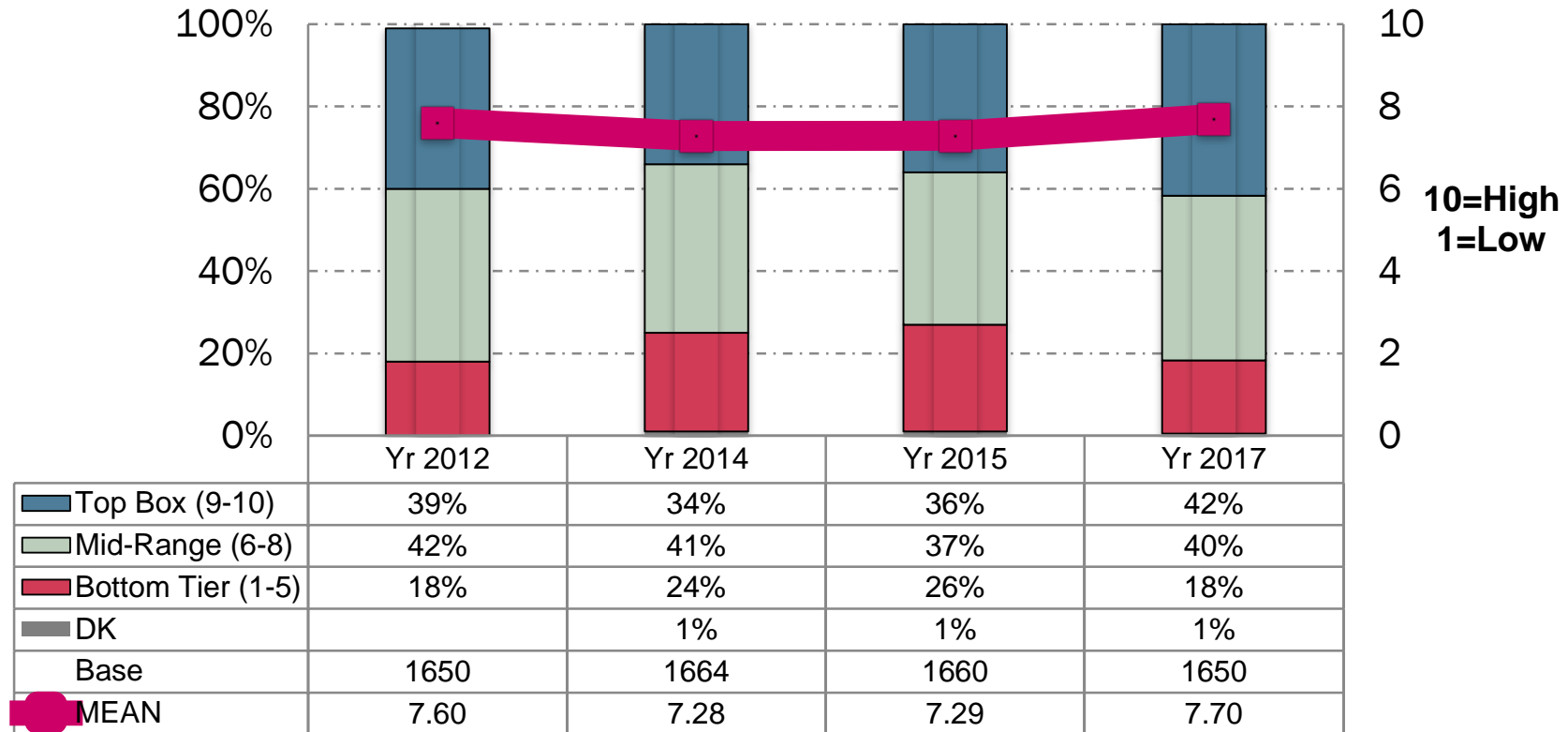
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

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



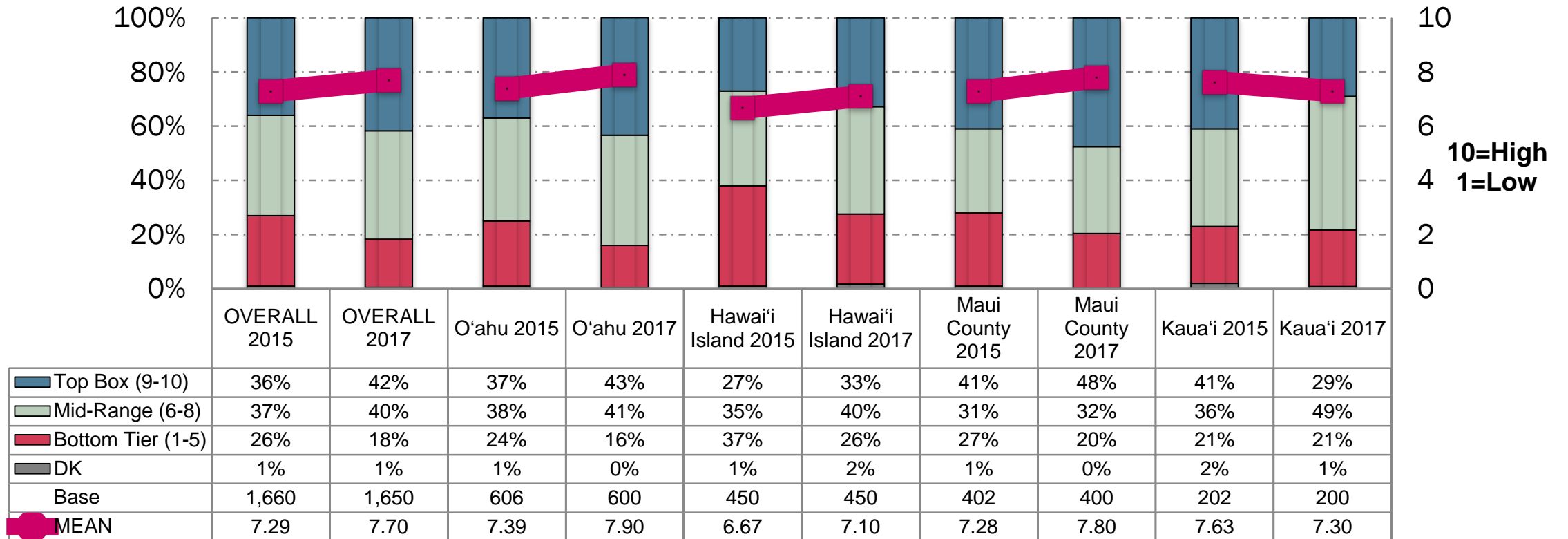
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism” – *Overall*



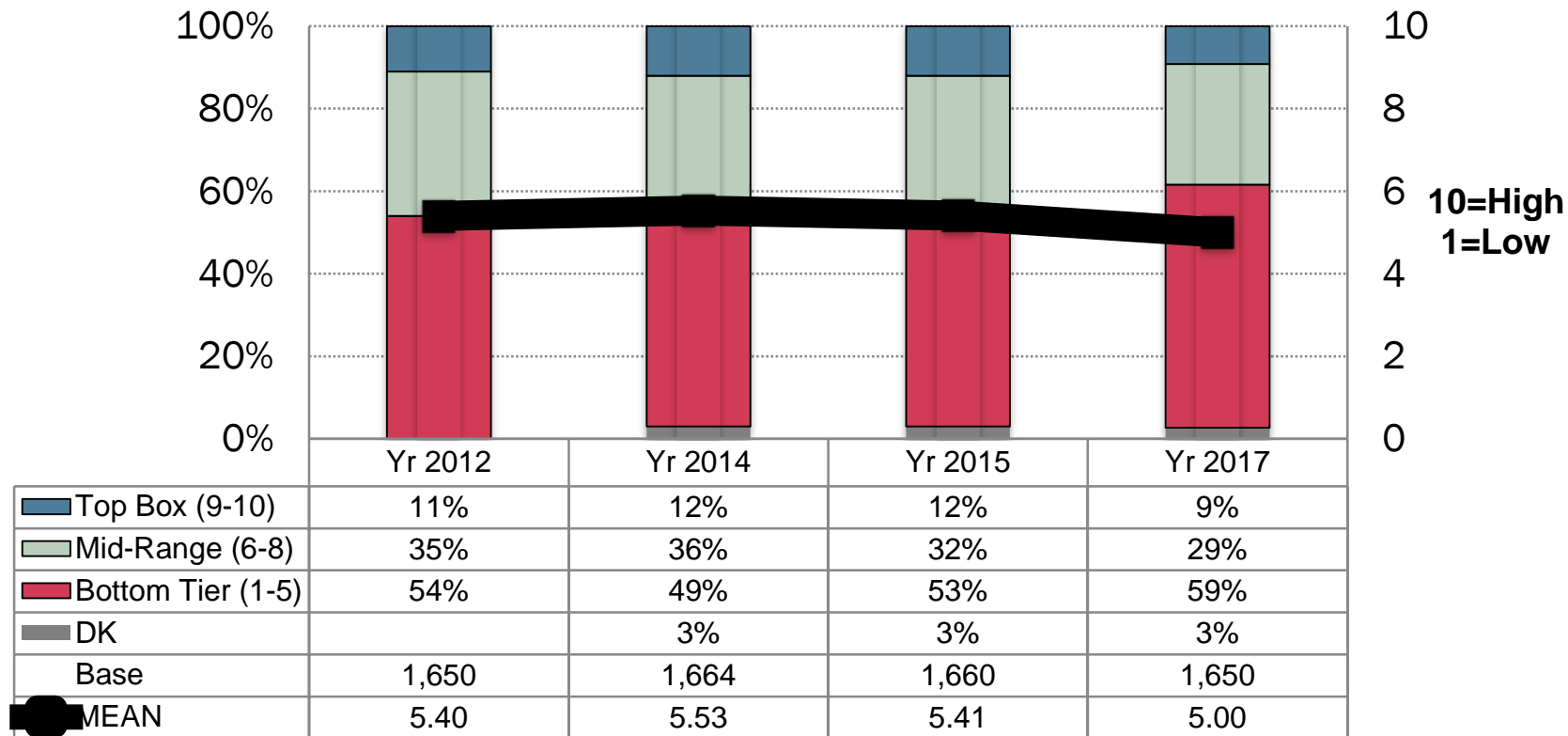
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“My Island’s economy is too dependent on tourism” – *By Island*



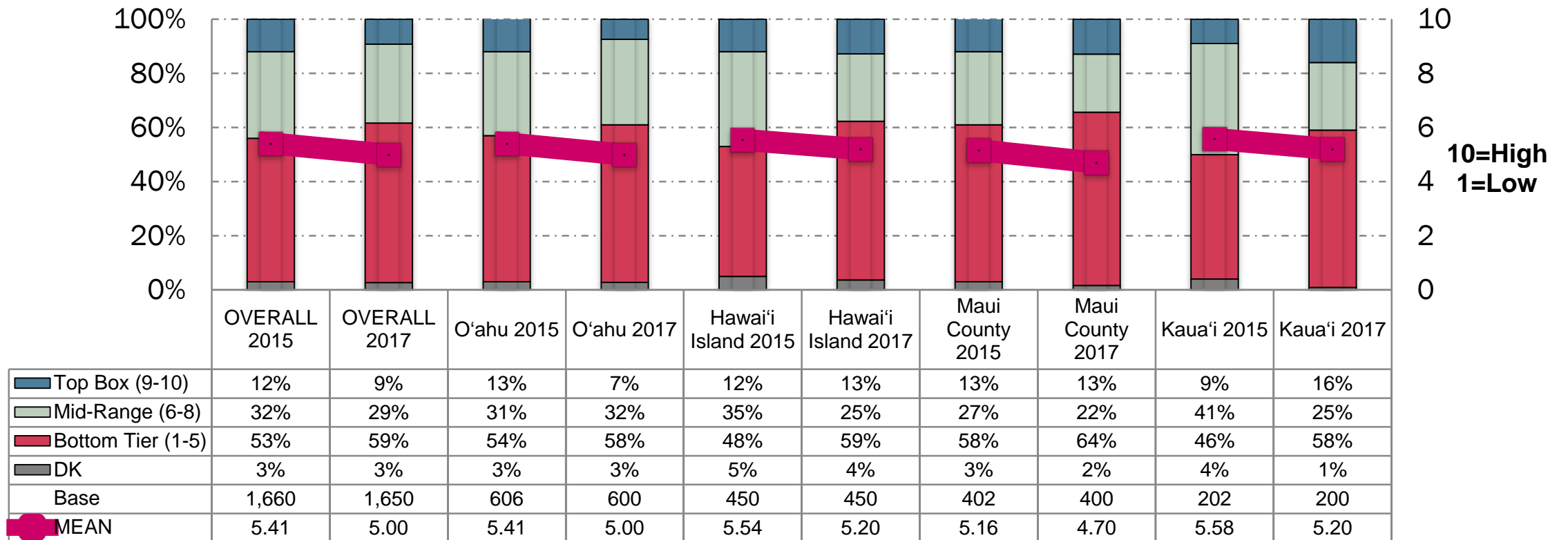
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism currently presents Native Hawaiian culture in an authentic manner” – *Overall*



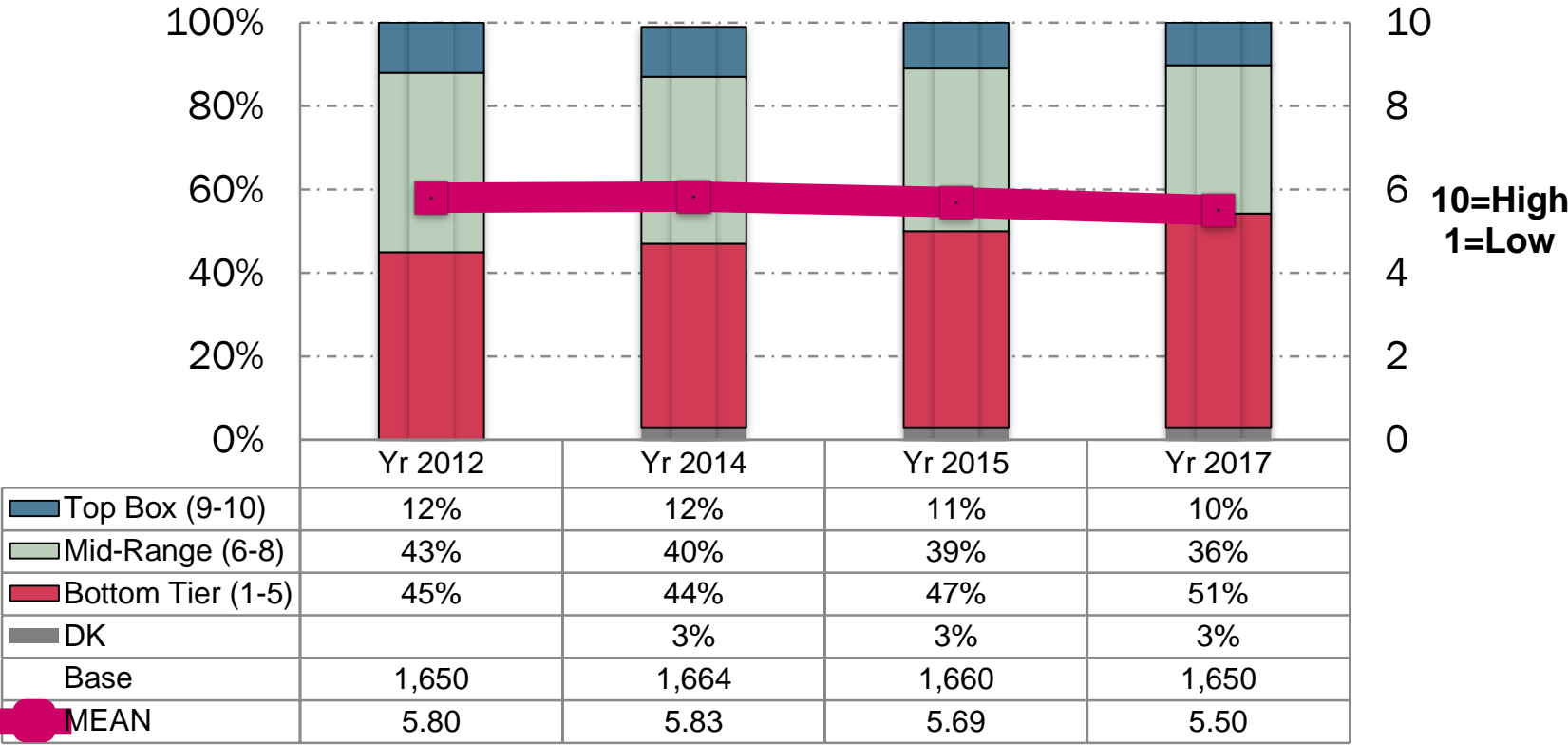
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism currently presents Native Hawaiian culture in an authentic manner” – *By Island*



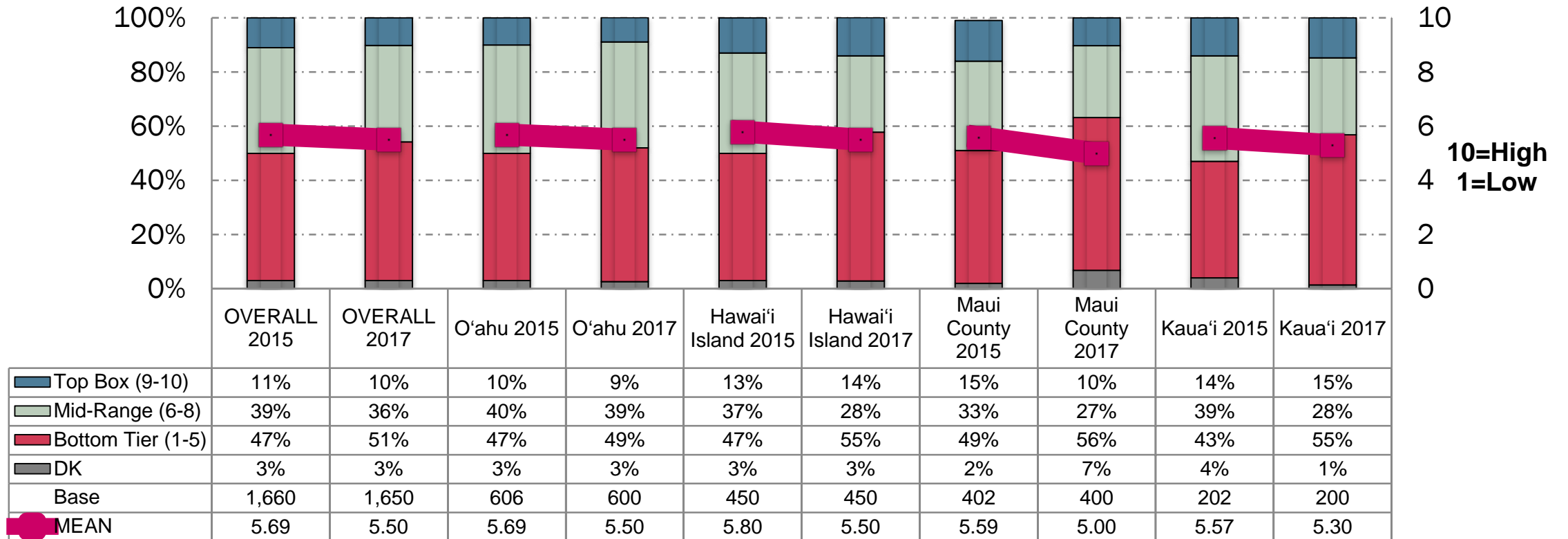
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism is consistent with community values on this island” – *Overall*



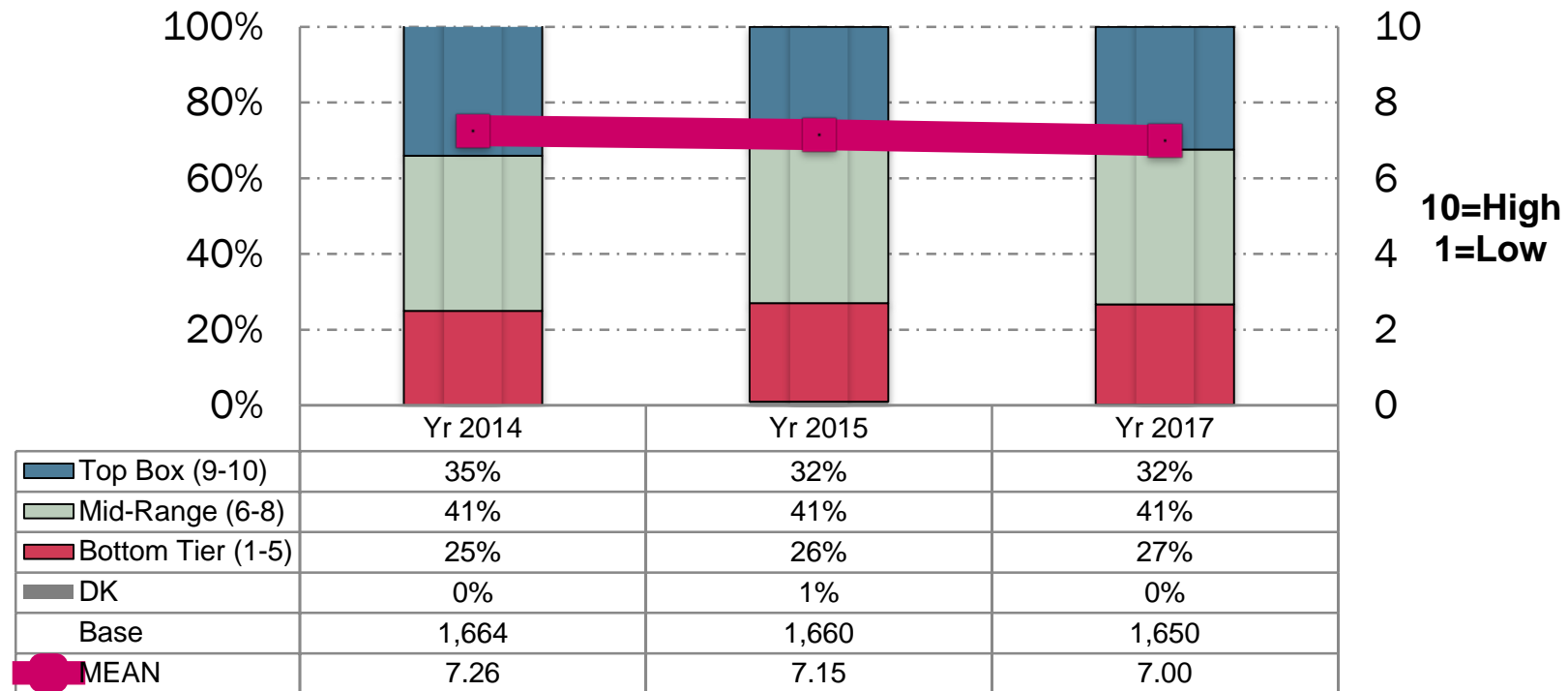
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism is consistent with community values on this island” – *By Island*



Q. 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...?

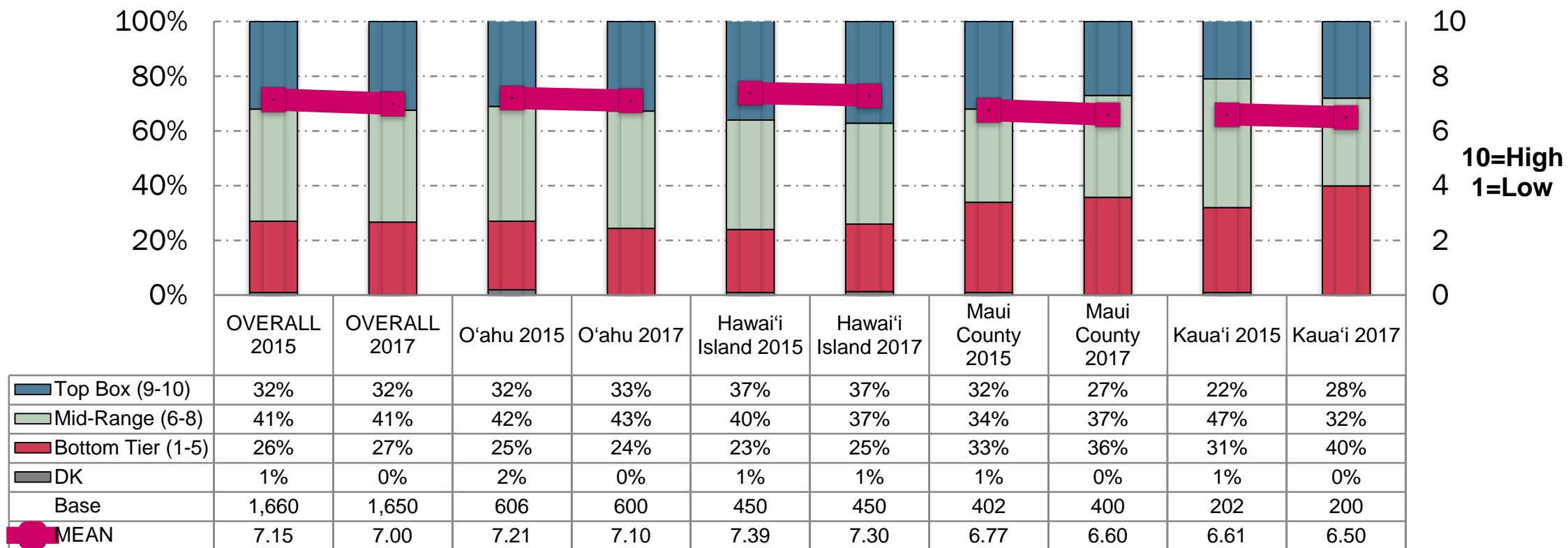
“Tourism should be actively encouraged on my island - *Overall*”



Q. 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 should be actively encouraged on my island”

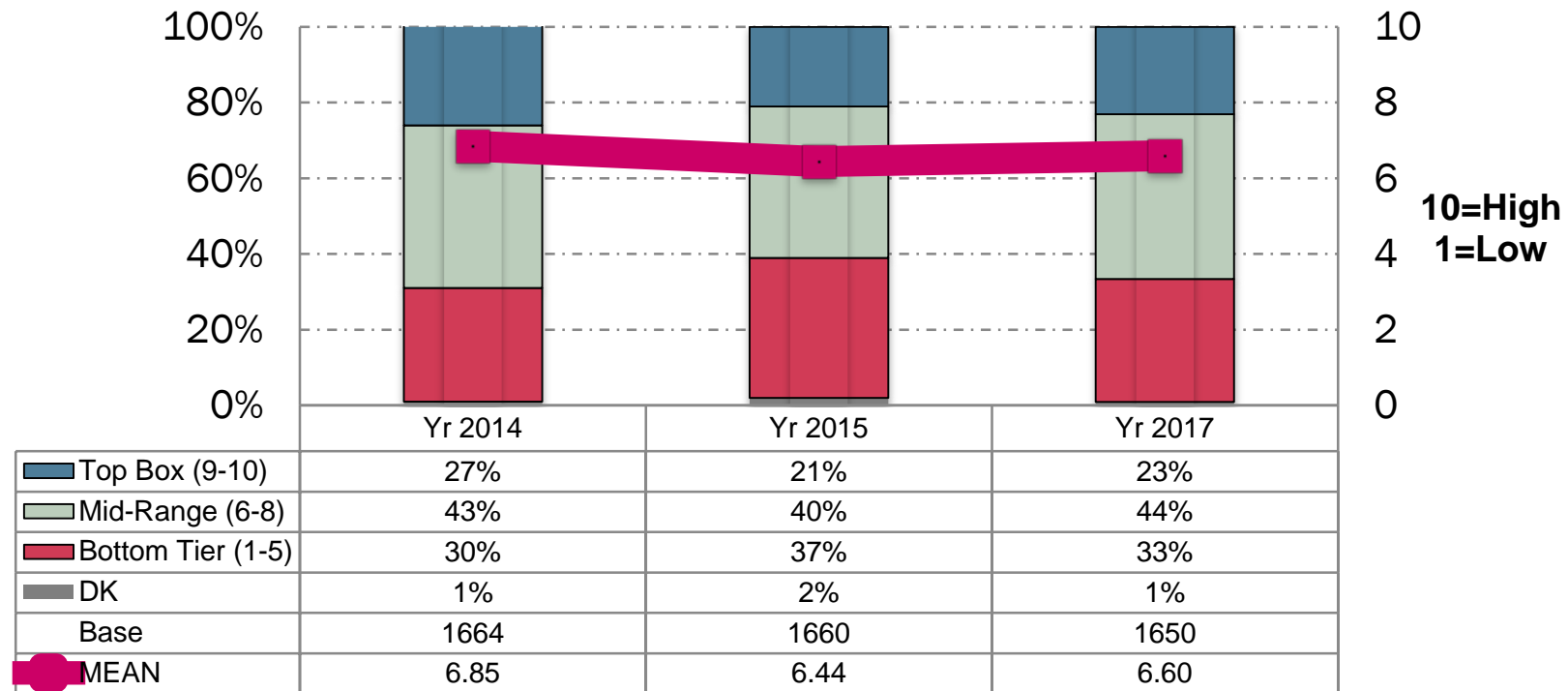
– *By Island*



Q. 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...?

“Funds should be spent to promote tourism in Hawai’i”

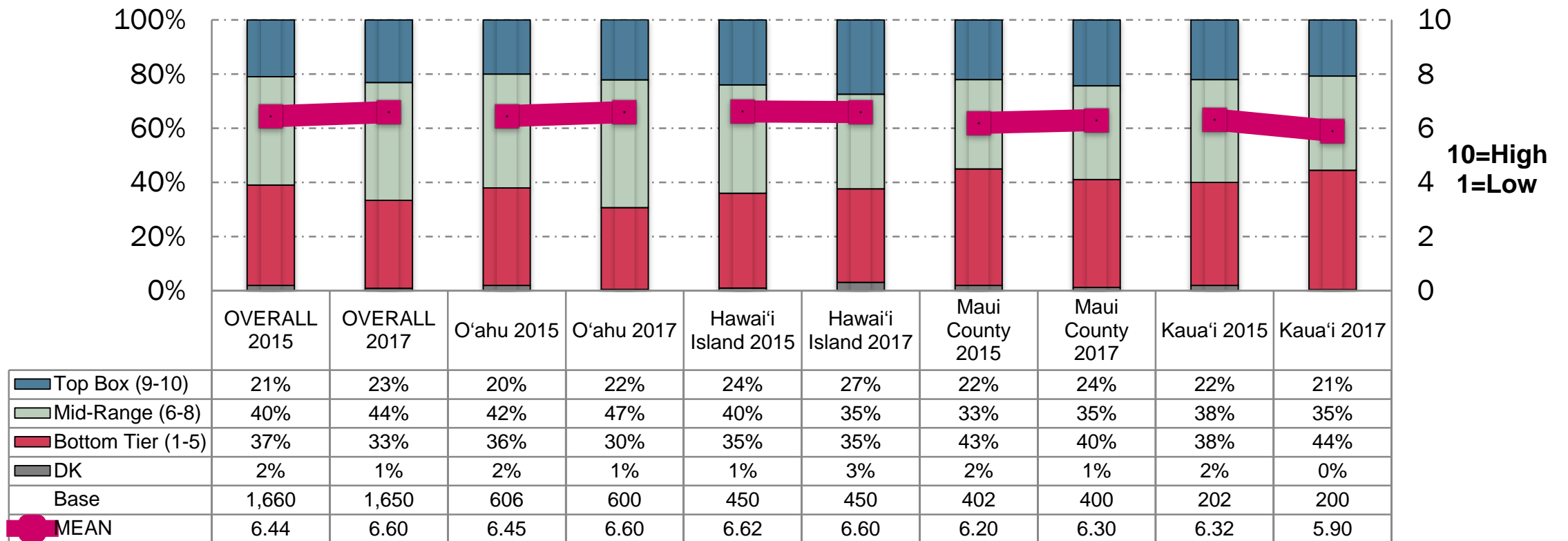
- *Overall*



Q. 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...?

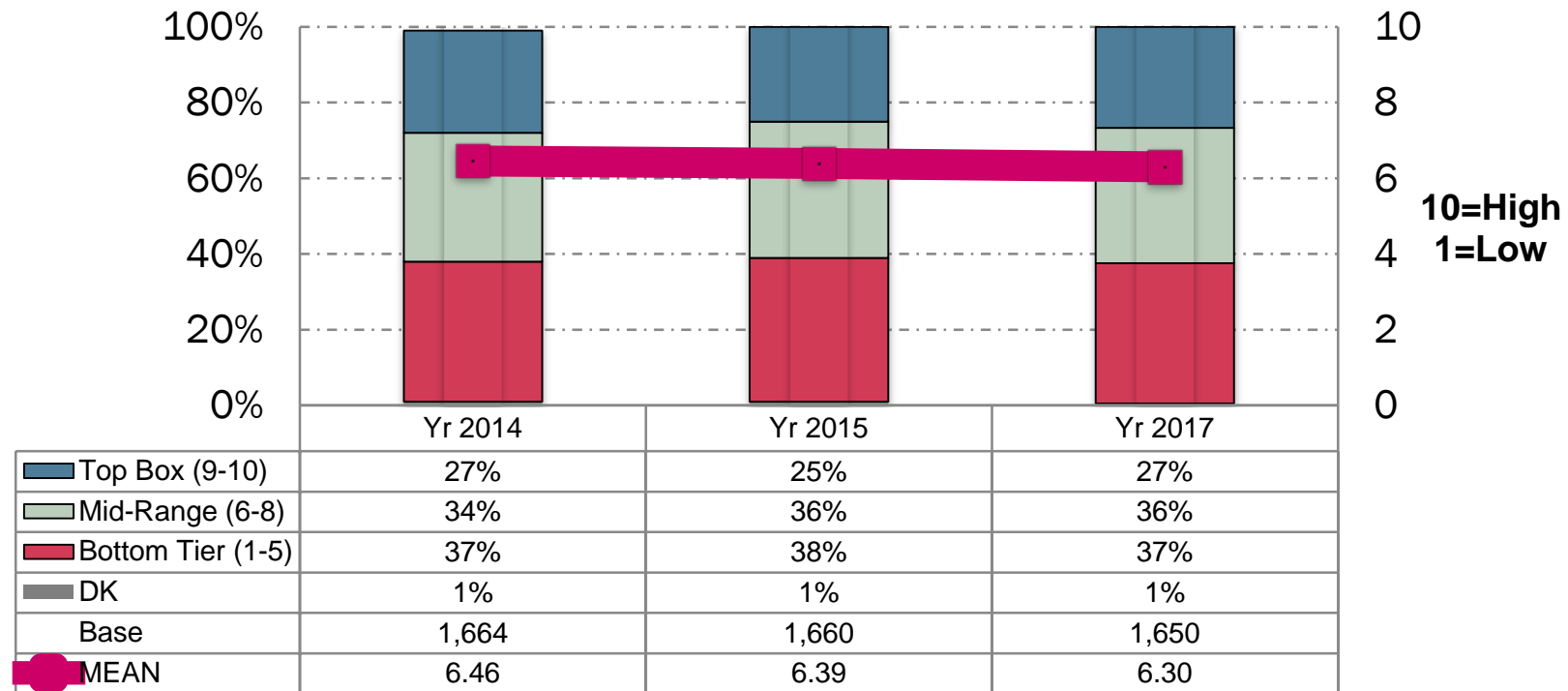
“Funds should be spent to promote tourism in Hawai‘i”

– *By Island*



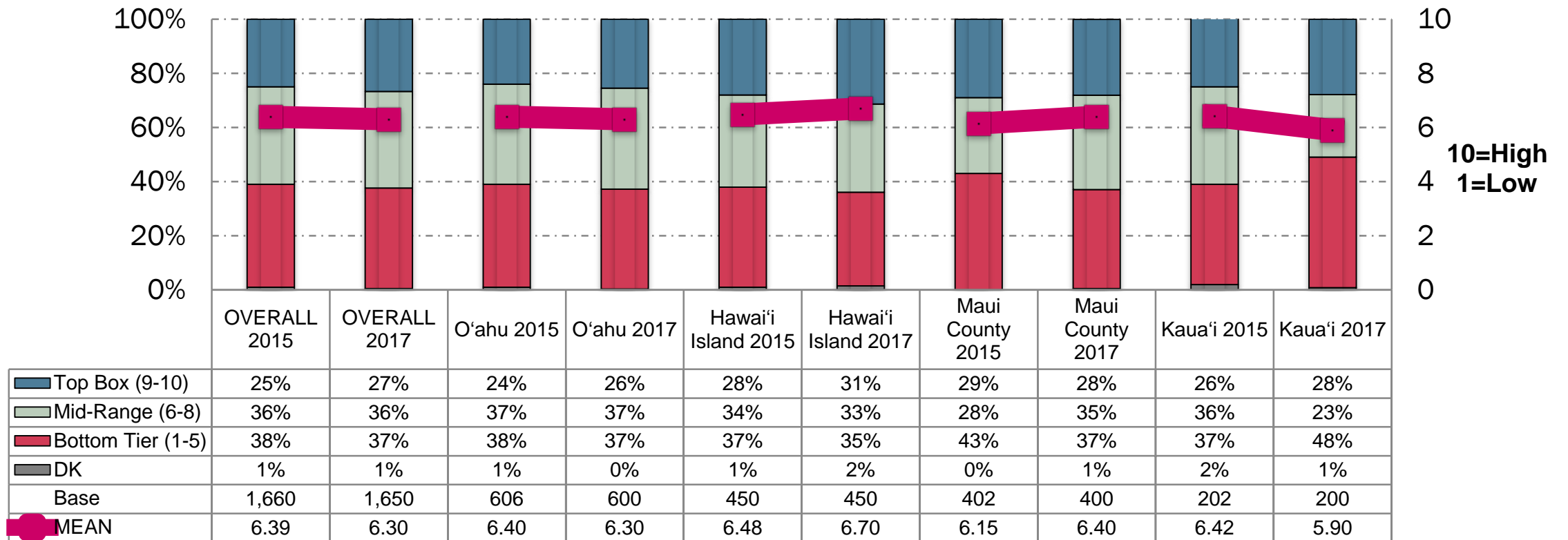
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism makes me feel special because people travel to see my island’s unique features” - *Overall*



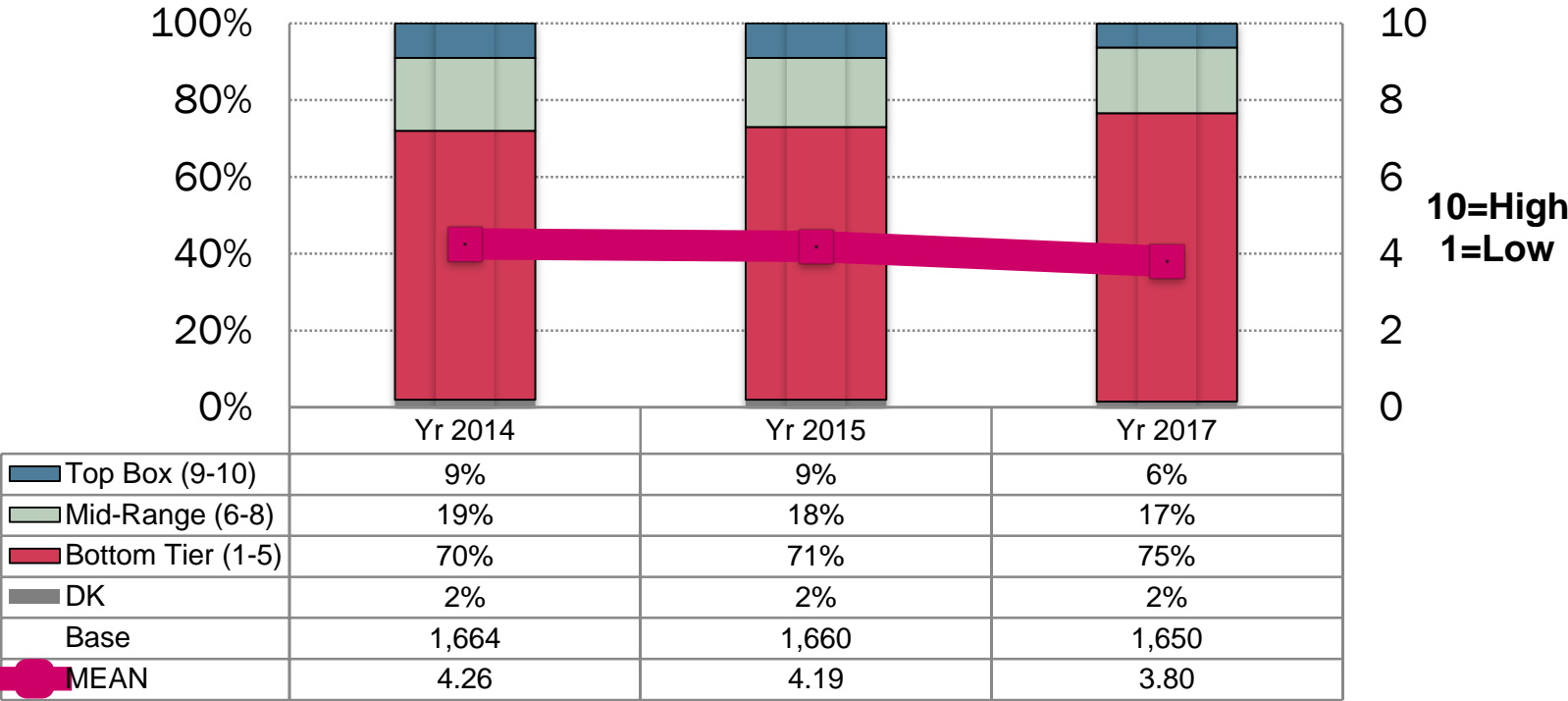
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism makes me feel special because people travel to see my island’s unique features” – *By Island*



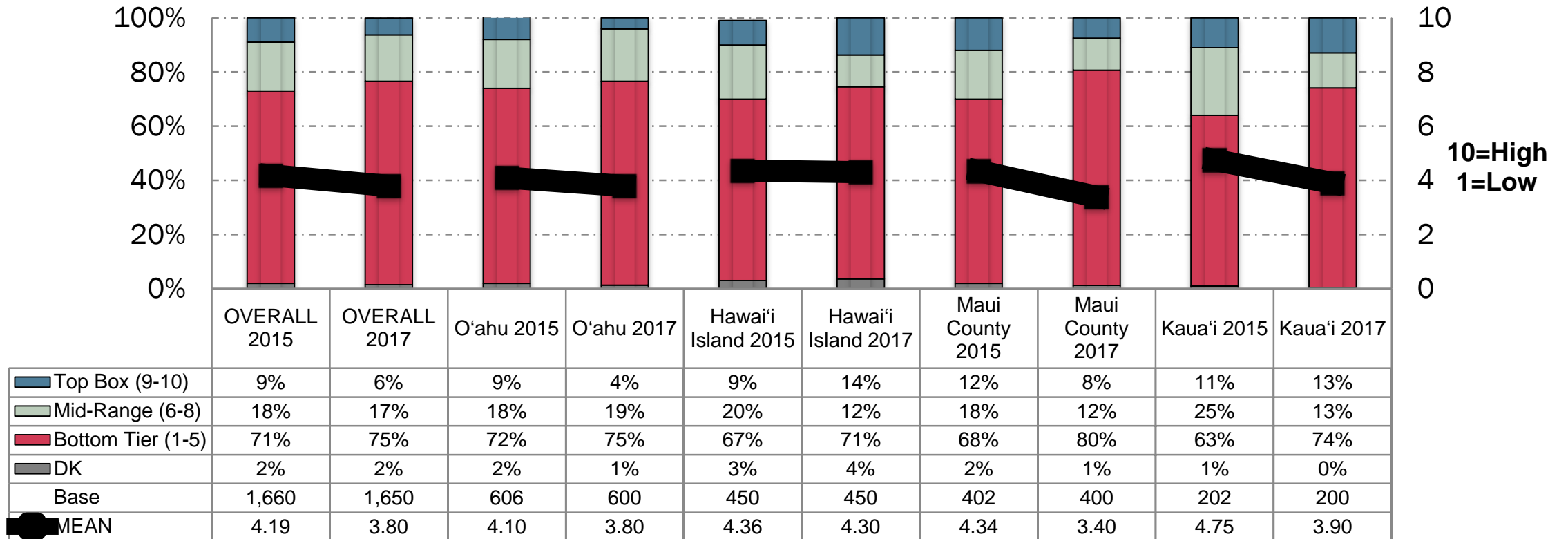
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” - *Overall*



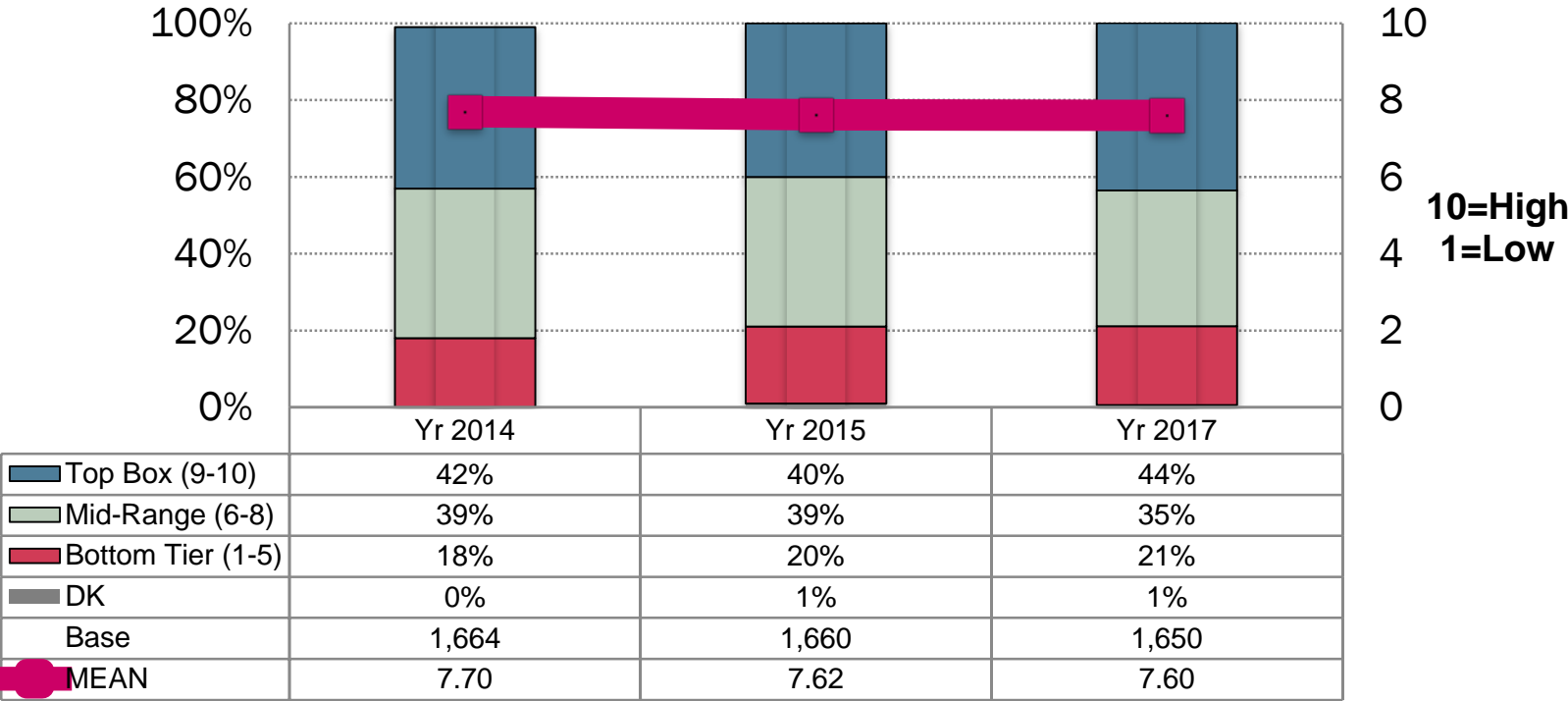
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“I feel like I have a voice in my island’s tourism development decisions” – *By Island*



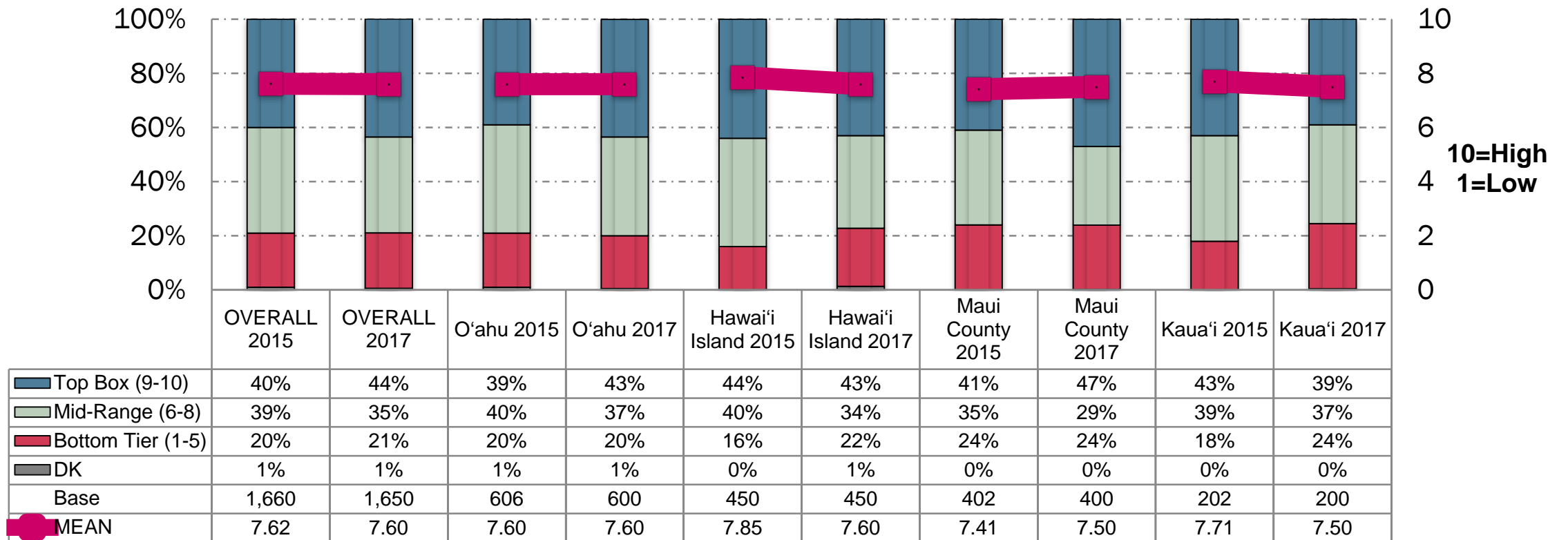
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

“Tourism in Hawai'i reminds me that we have a unique culture to share with visitors” - *Overall*



Q. 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 in Hawai'i reminds me that we have a unique culture to share with visitors” – *By Island*

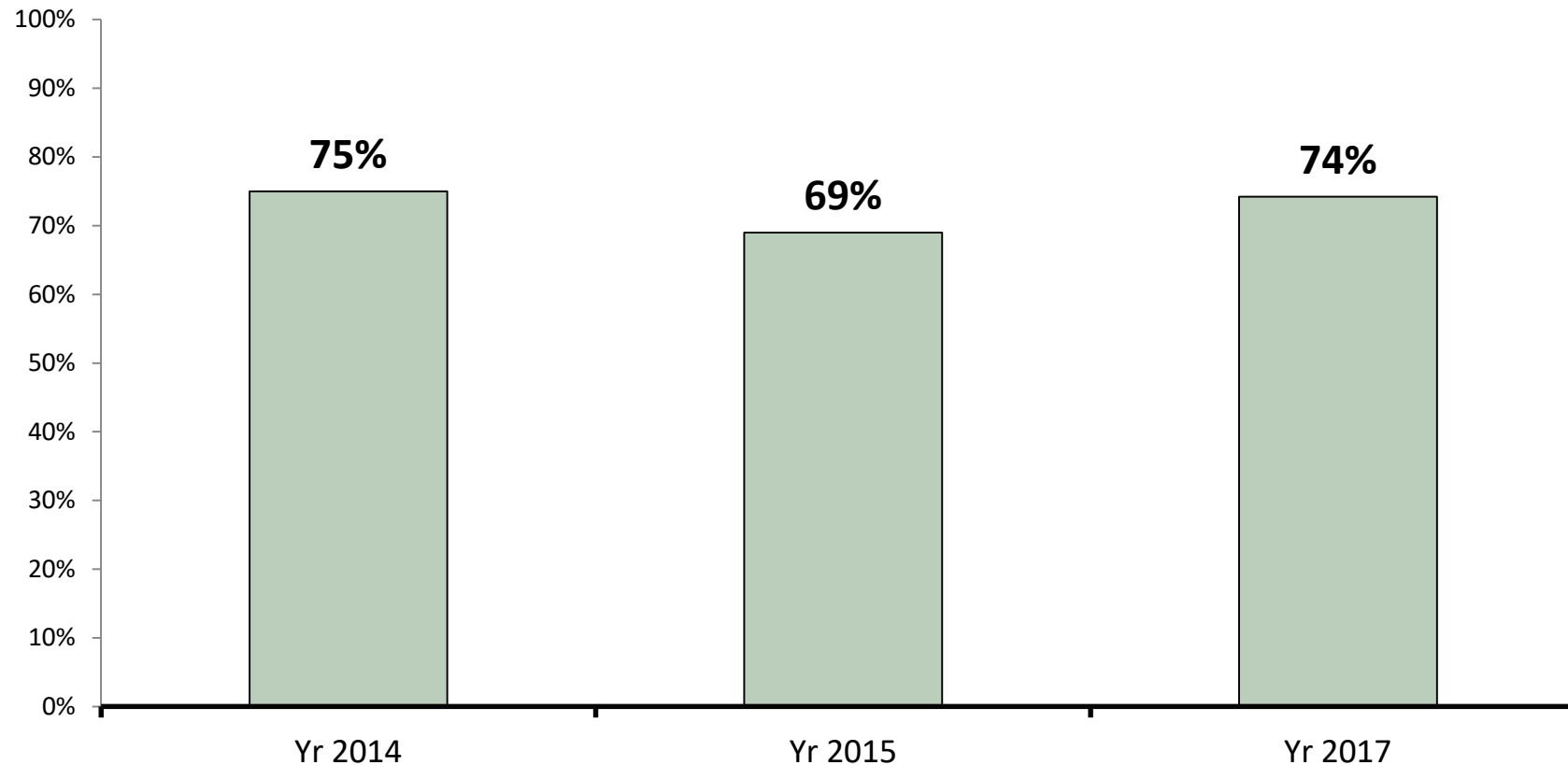


Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?



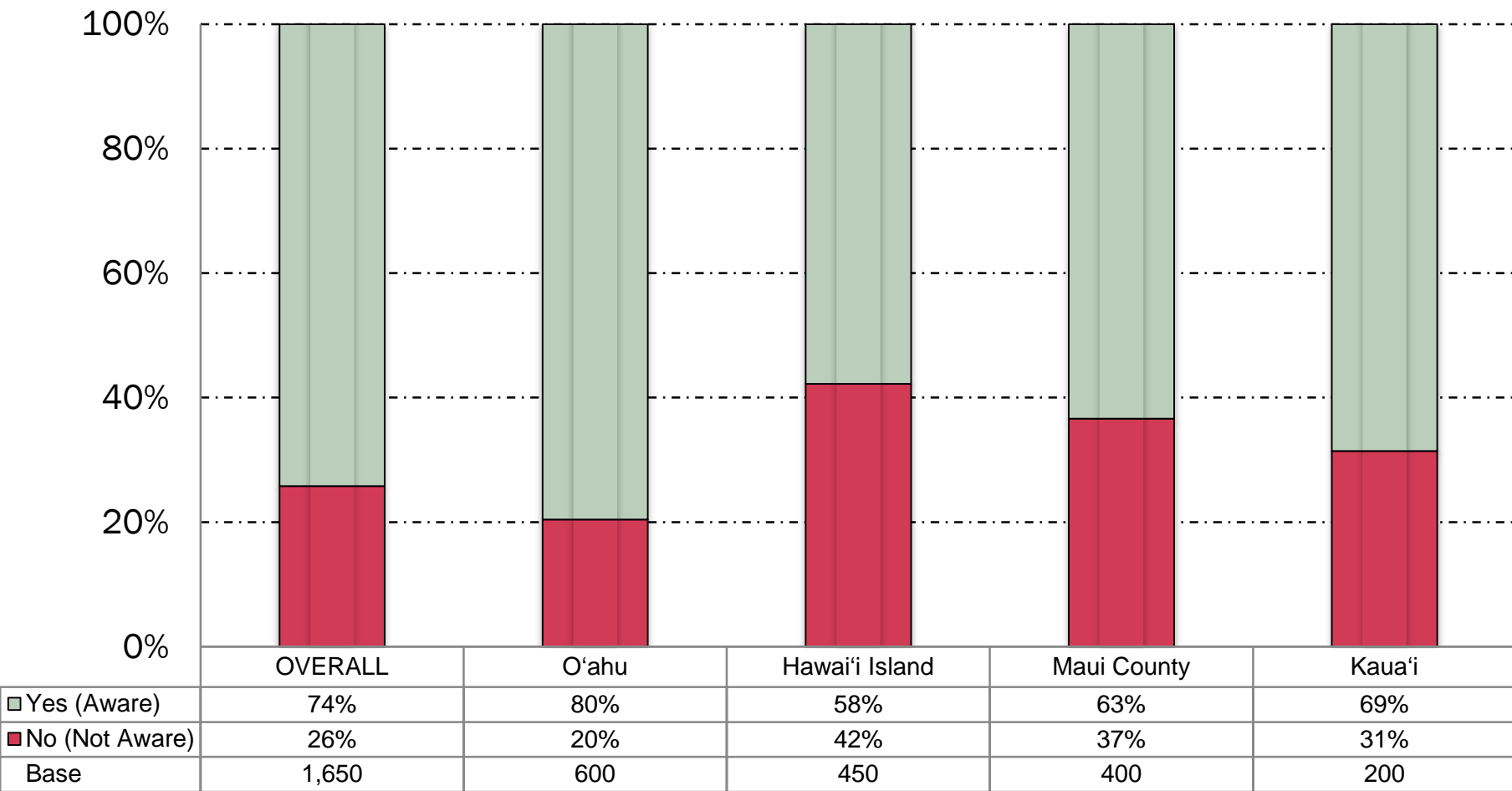
Perceptions of the Hawai'i Tourism Authority

Hawai'i Tourism Authority Aided Name Awareness



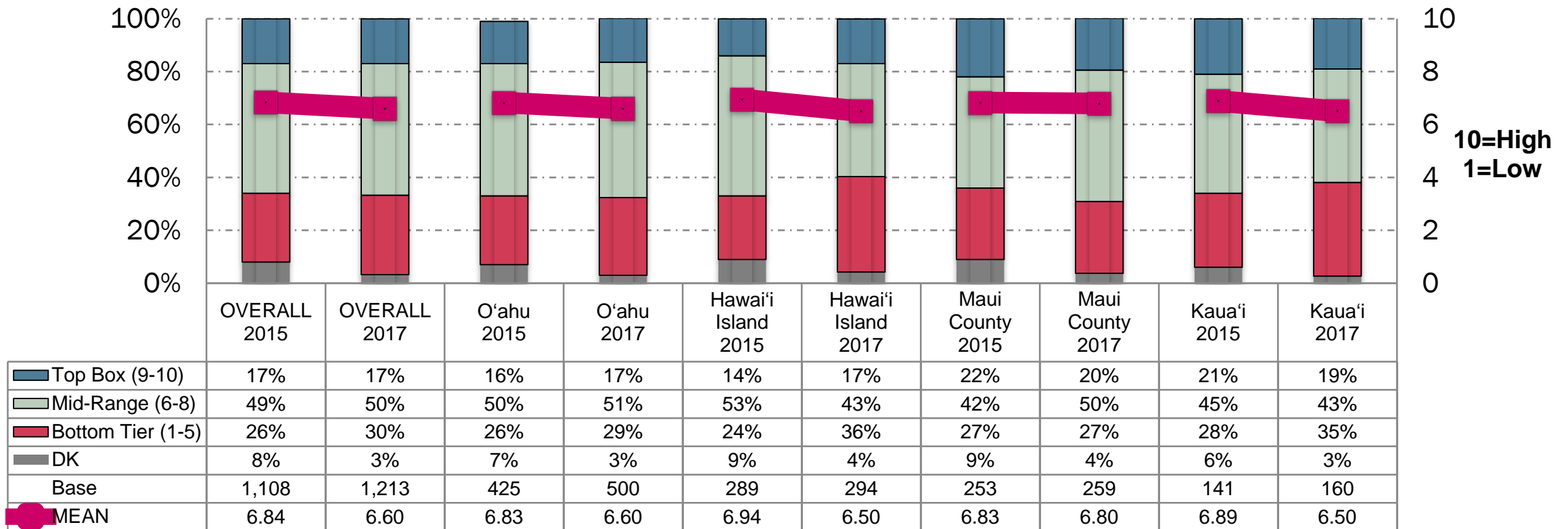
Q. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

Hawai'i Tourism Authority Aided Name Awareness



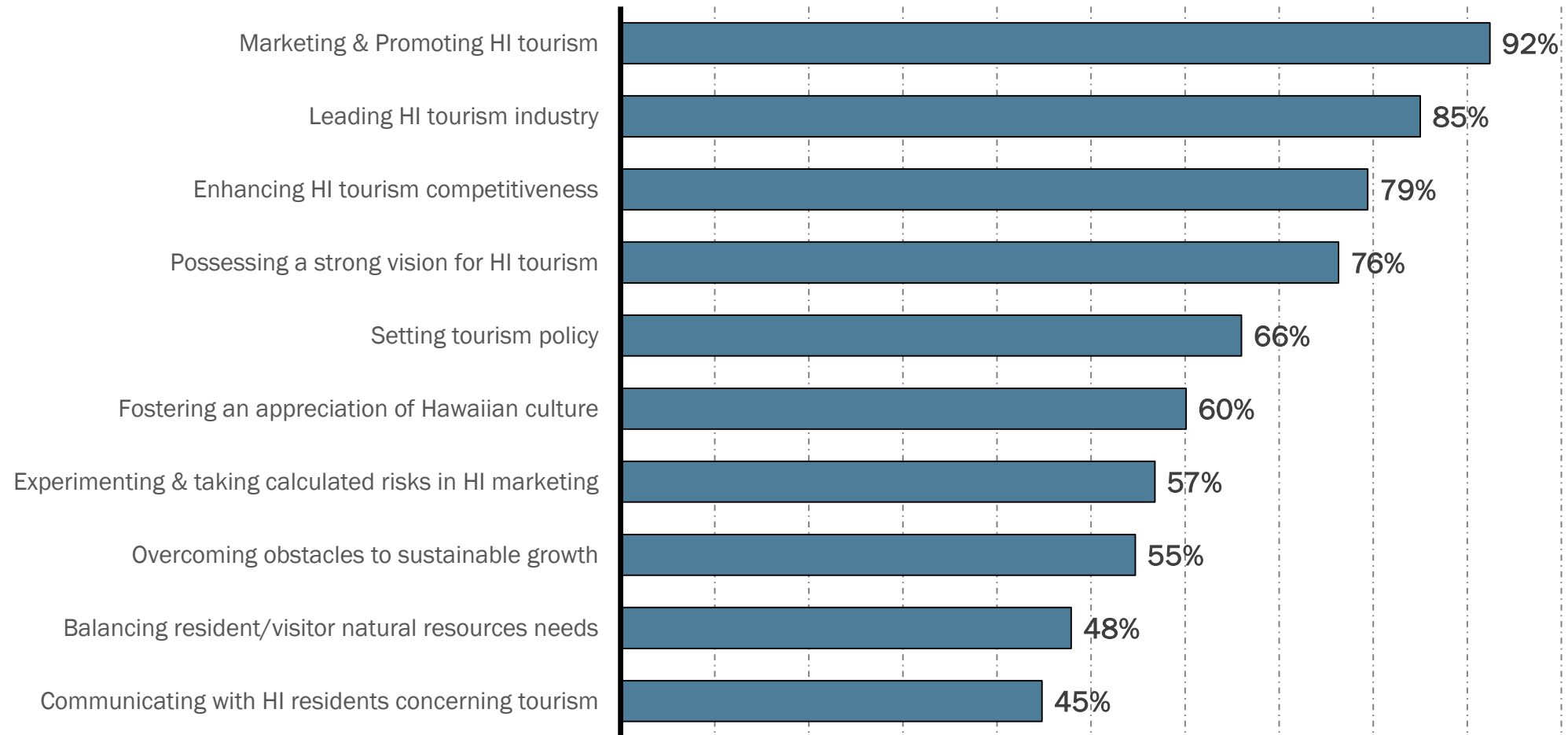
Q. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

HTA Favorability Score – *By Island*



Q. Using a 10-point scale where 10 means extremely favorable and one means not favorable at all, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall and their work to promote Hawai'i tourism:

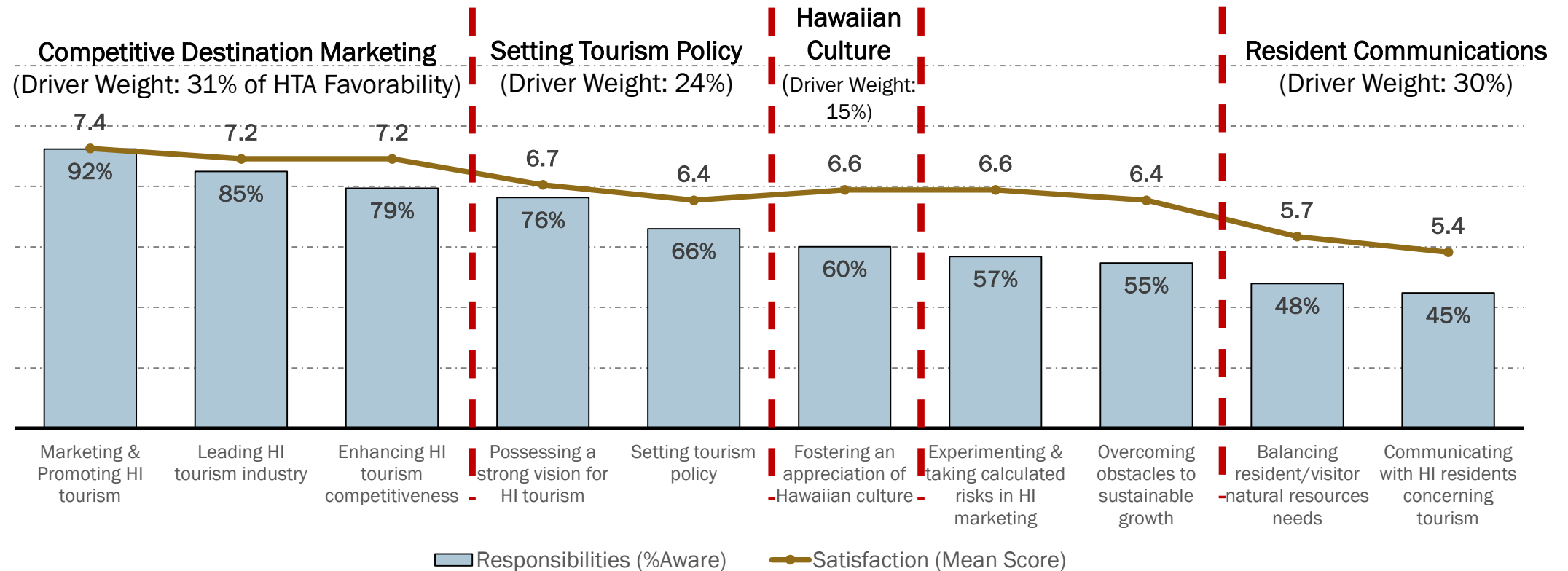
Perceived Hawai'i Tourism Authority Responsibilities (among residents aware of HTA)



Q. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for and has an important role in?

Satisfaction with the Hawai'i Tourism Authority

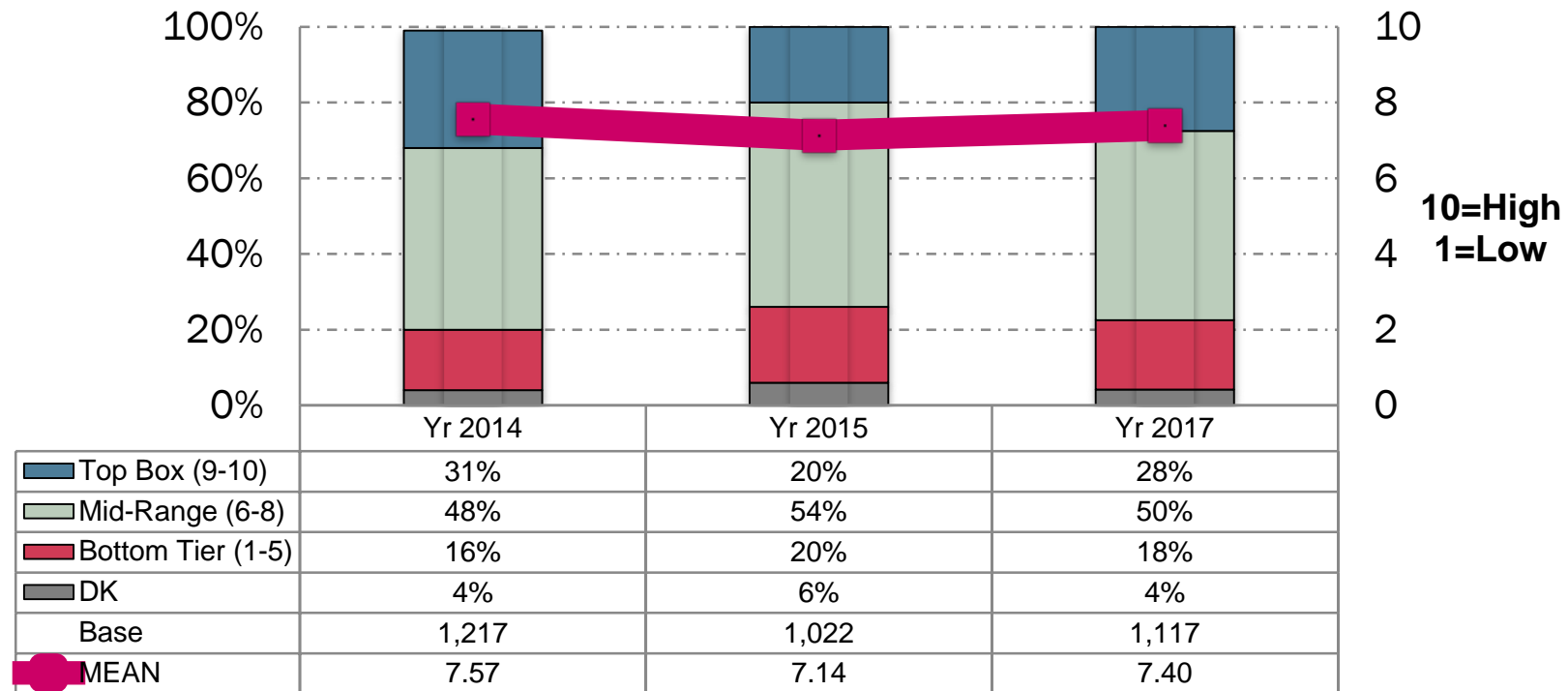
(among residents aware that HTA plays an important role in each area)



Q. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for and has an important role in?

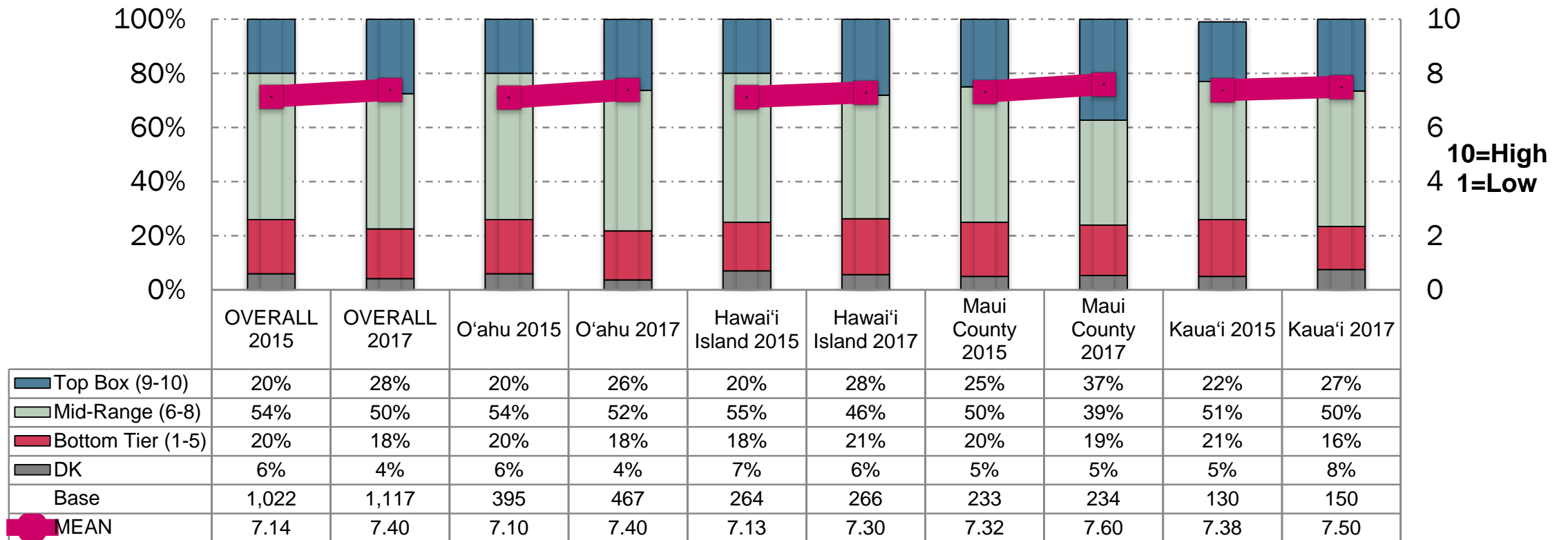
Q. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority is doing an Excellent job and 1 means you think the Hawai'i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?

“Marketing and promoting tourism in Hawai’i” - *Overall*



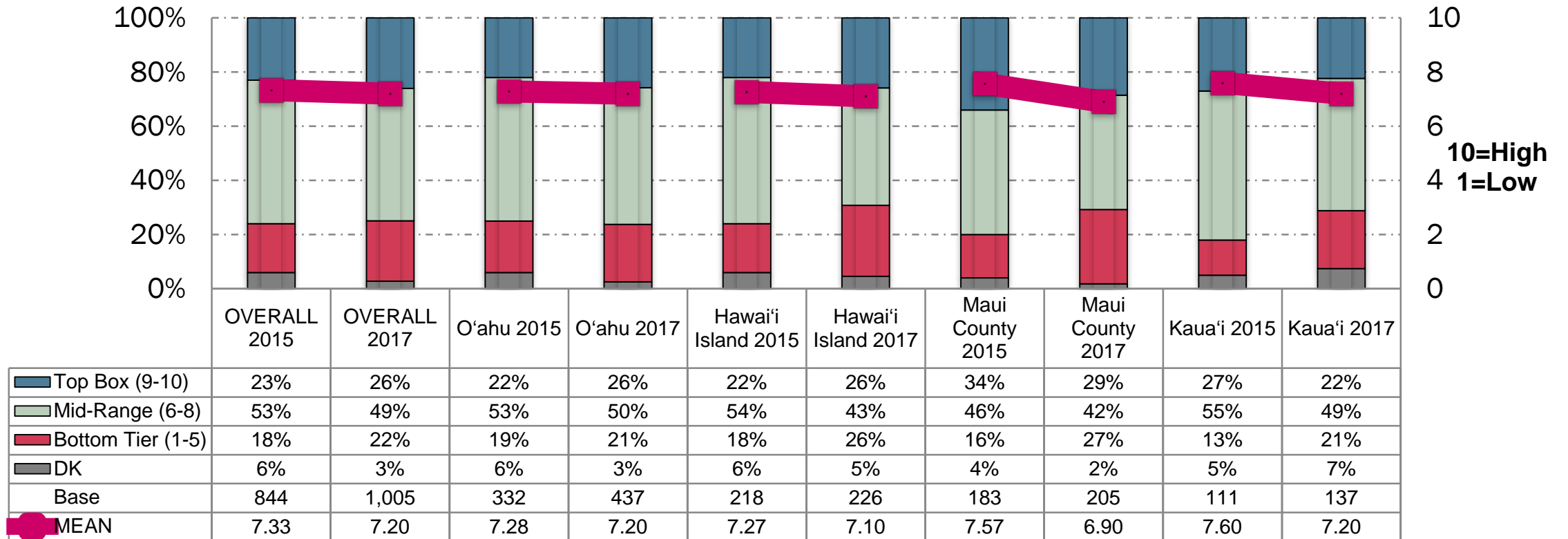
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Marketing and promoting tourism in Hawai’i” – *By Island*



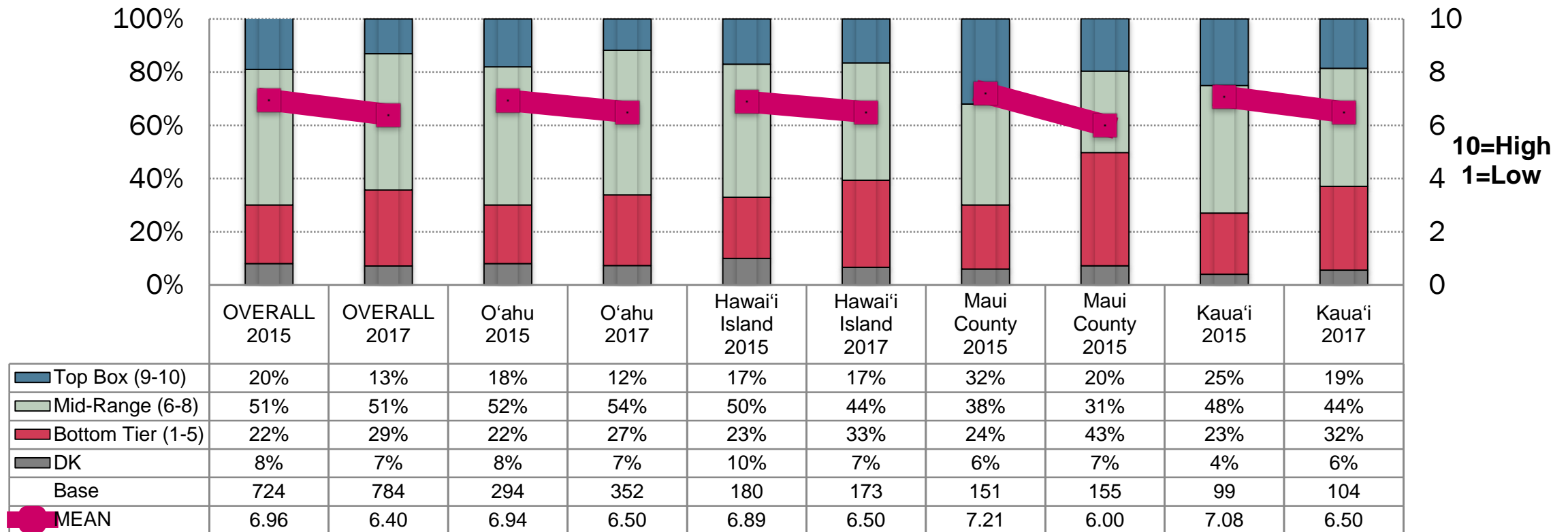
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Leading the tourism industry in Hawai‘i” – *By Island*



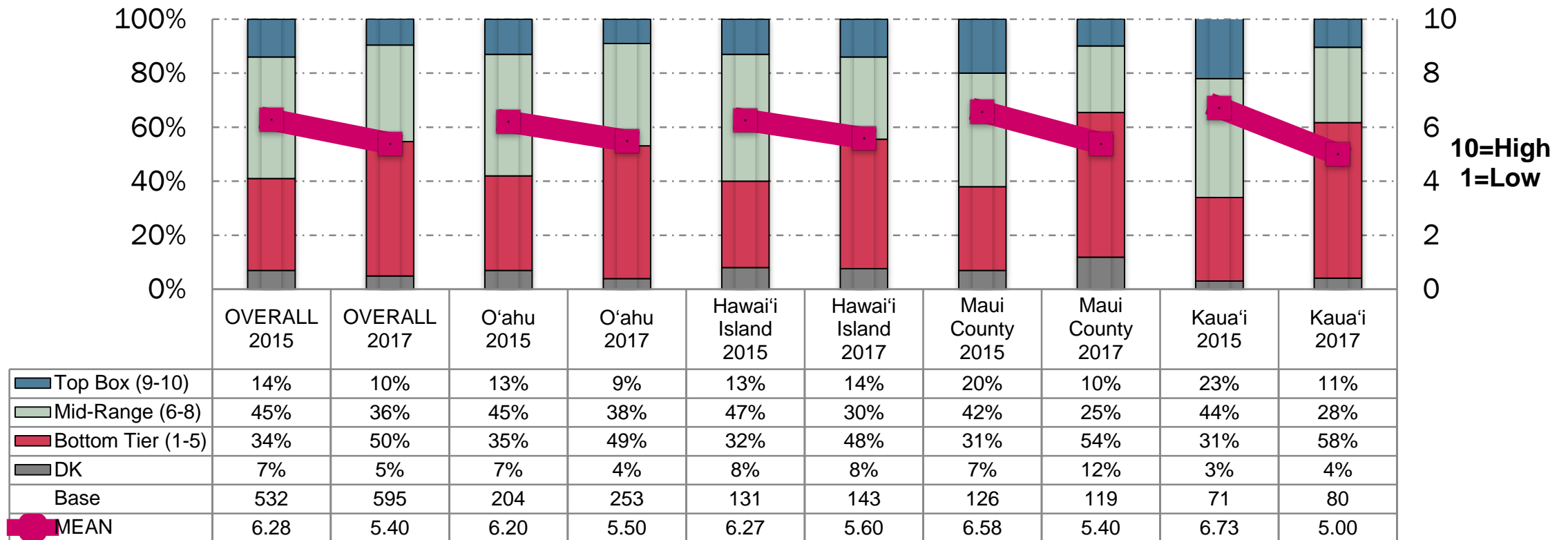
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Setting tourism policy and direction with the goal of contributing to the ongoing, sustainable growth of Hawai'i's economy” – *By Island*



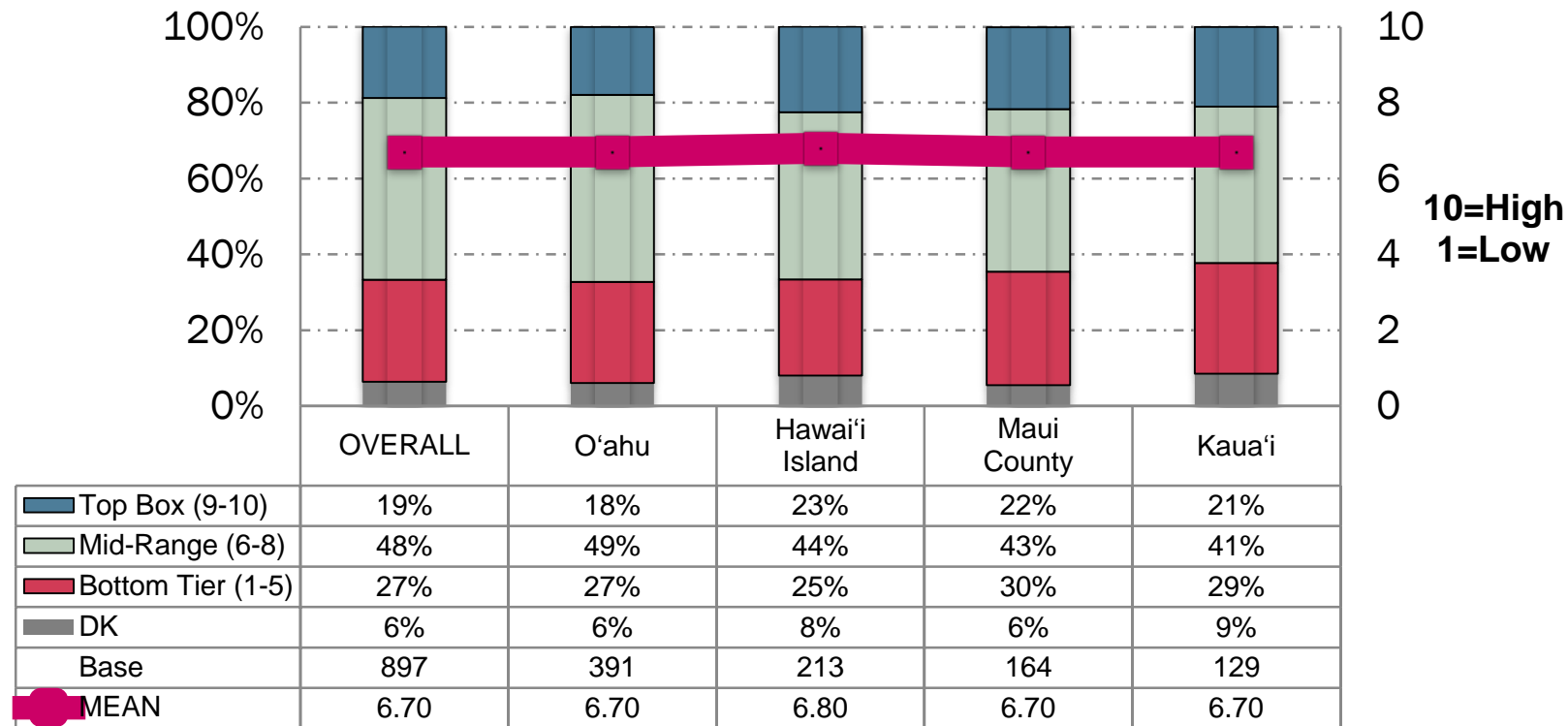
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Communicating with and listening to Hawai'i residents concerning tourism-related issues and concerns” – *By Island*



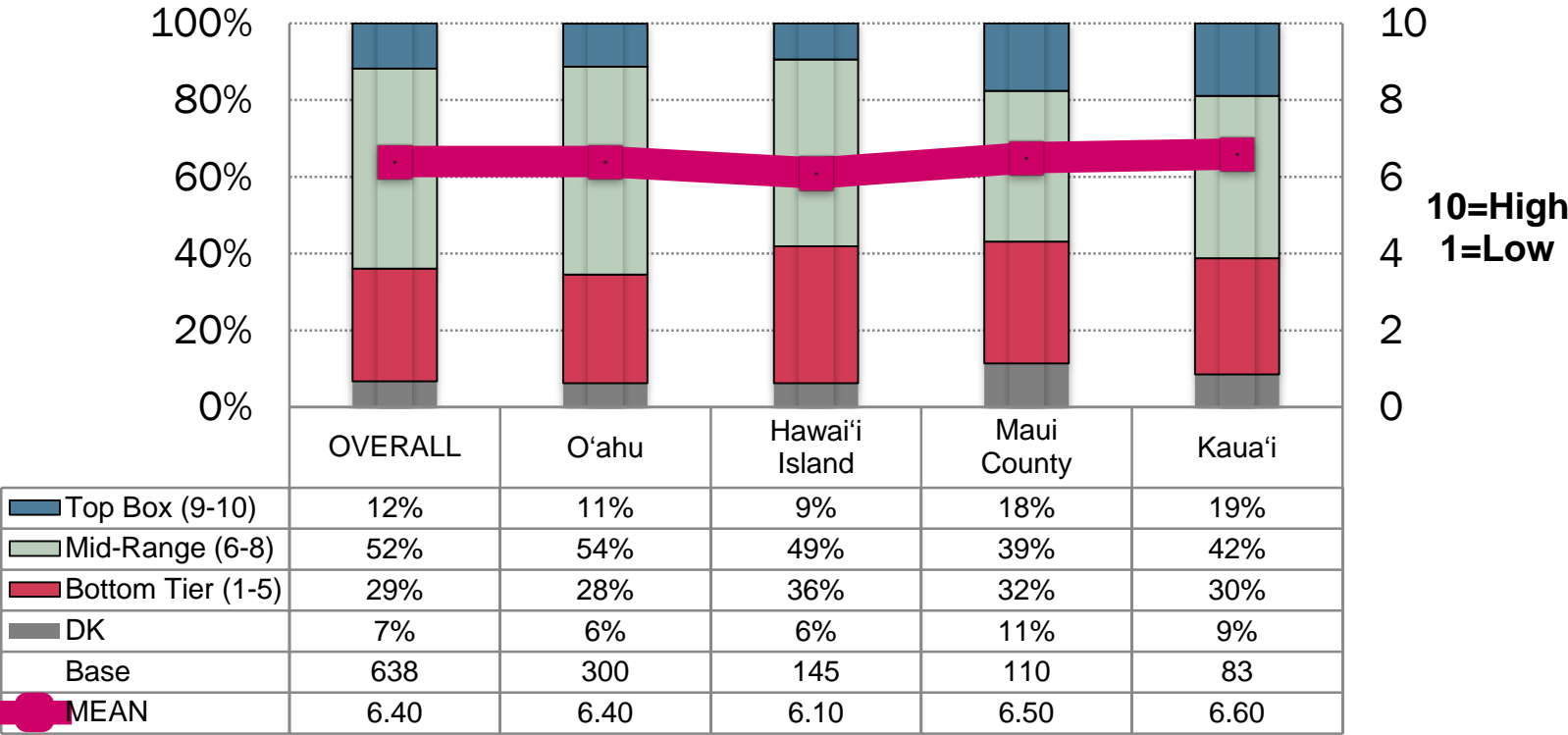
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Possessing a strong vision for the future of Hawai‘i’s tourism industry” – *By Island*



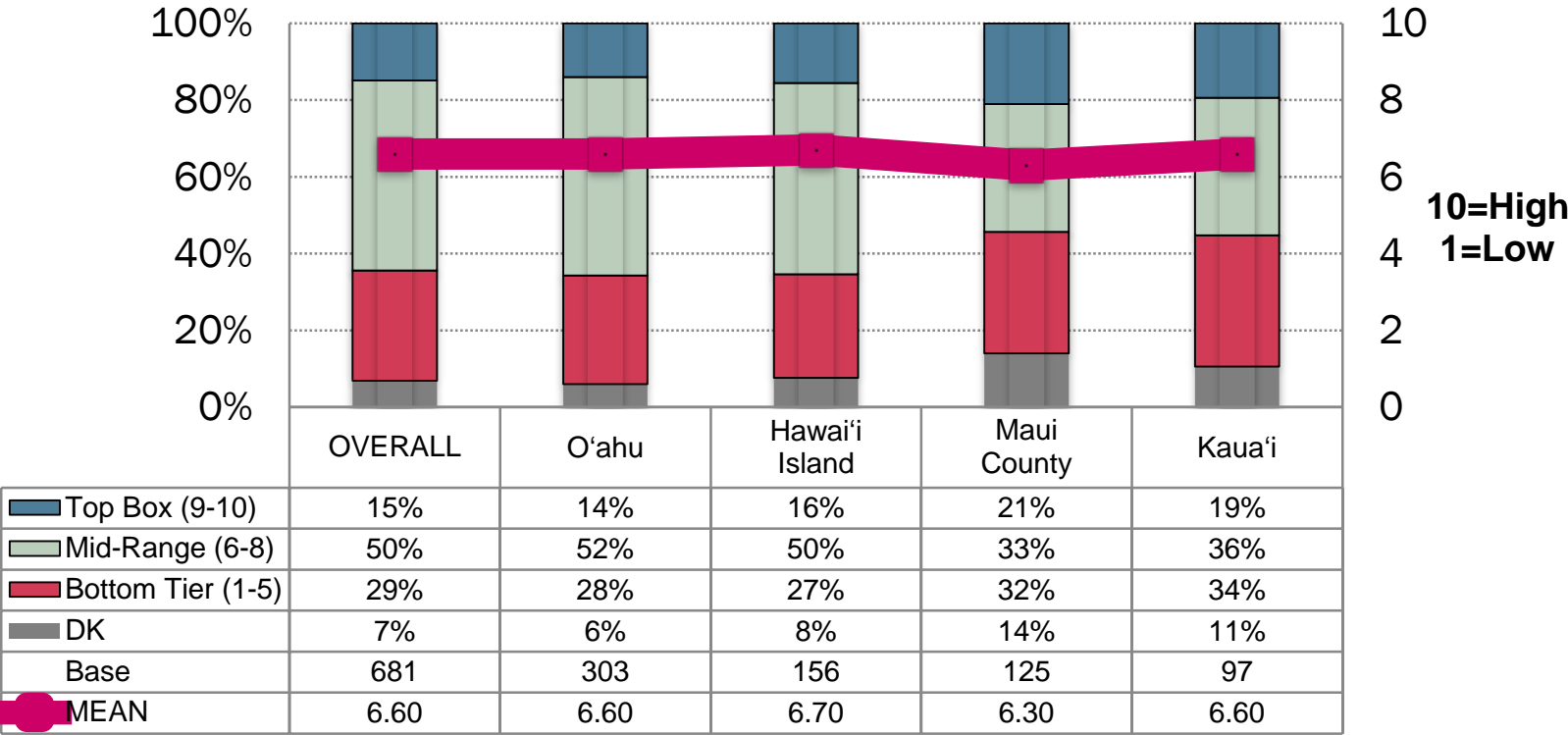
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Taking initiative to overcome obstacles preventing sustainable growth for Hawai‘i’s tourism industry” – *By Island*



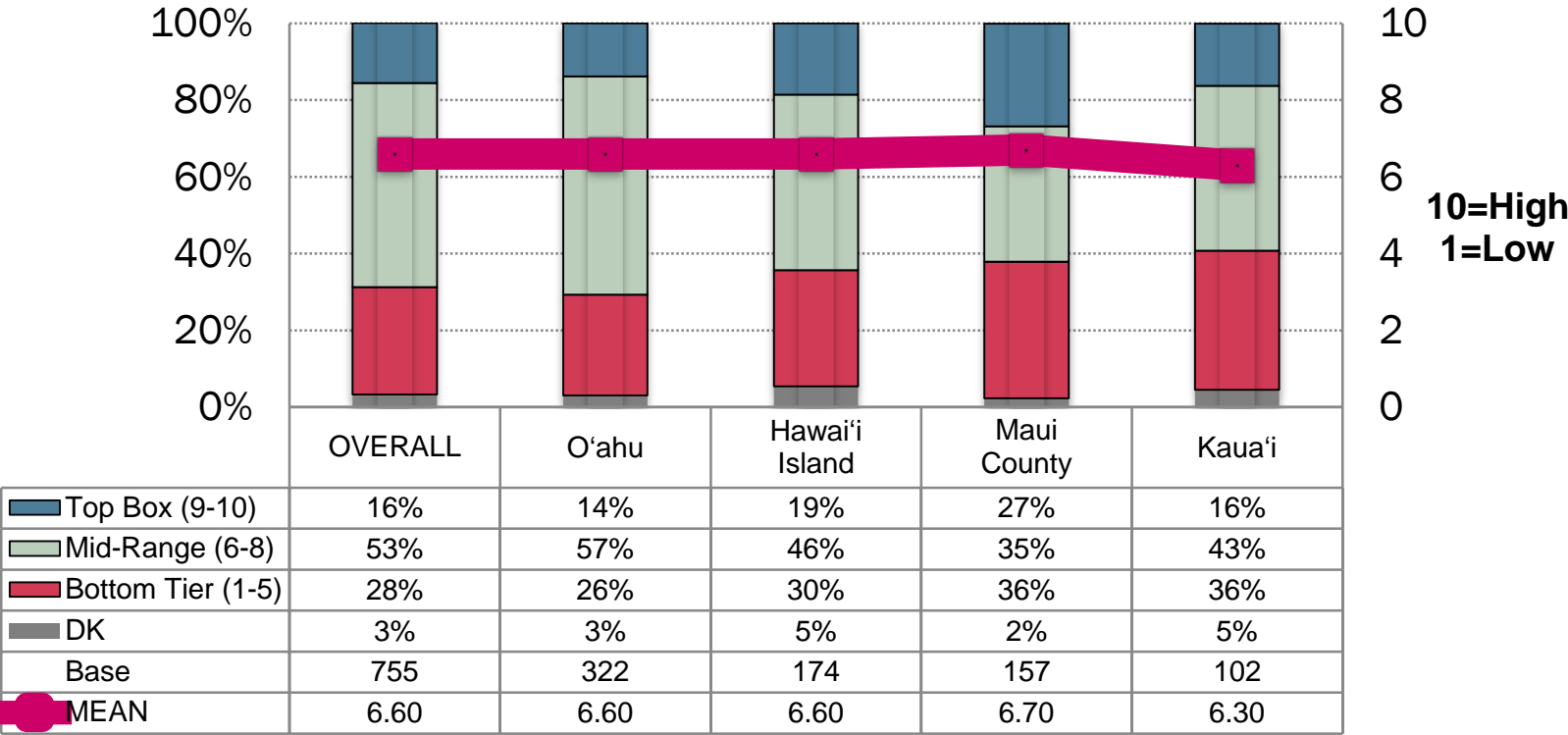
Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Experimenting and taking calculated risks in supporting and marketing Hawai‘i tourism” – *By Island*



Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

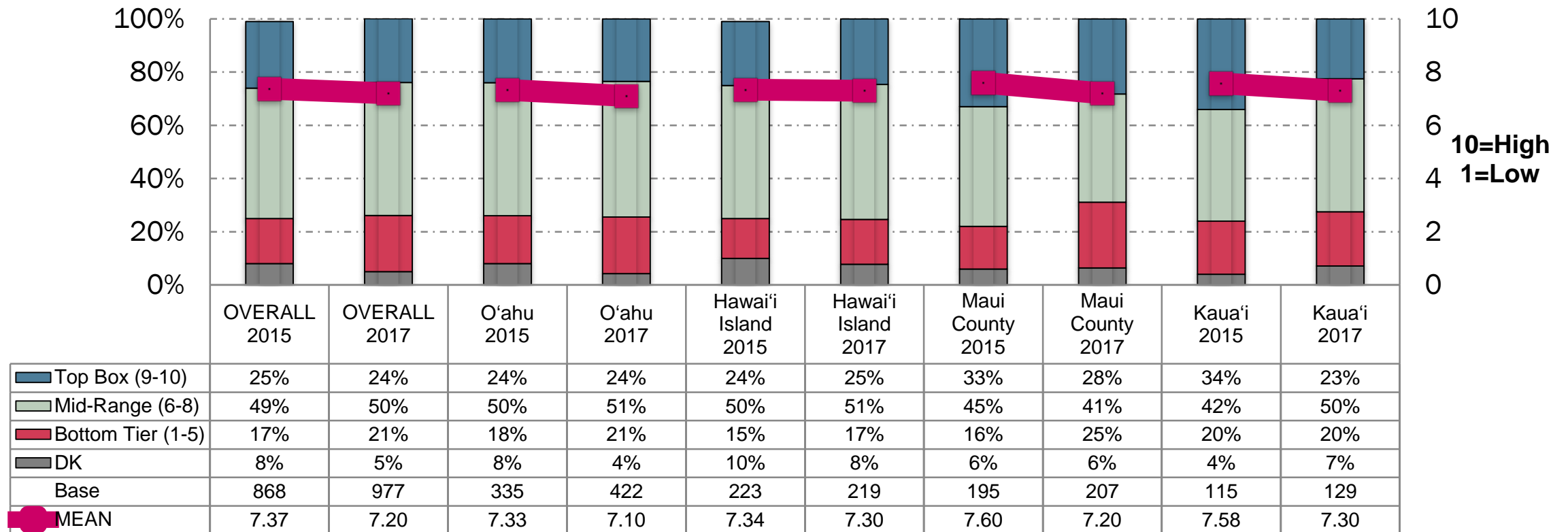
“Fostering an appreciation of the contributions the Hawaiian culture offers to the world” – *By Island*



Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

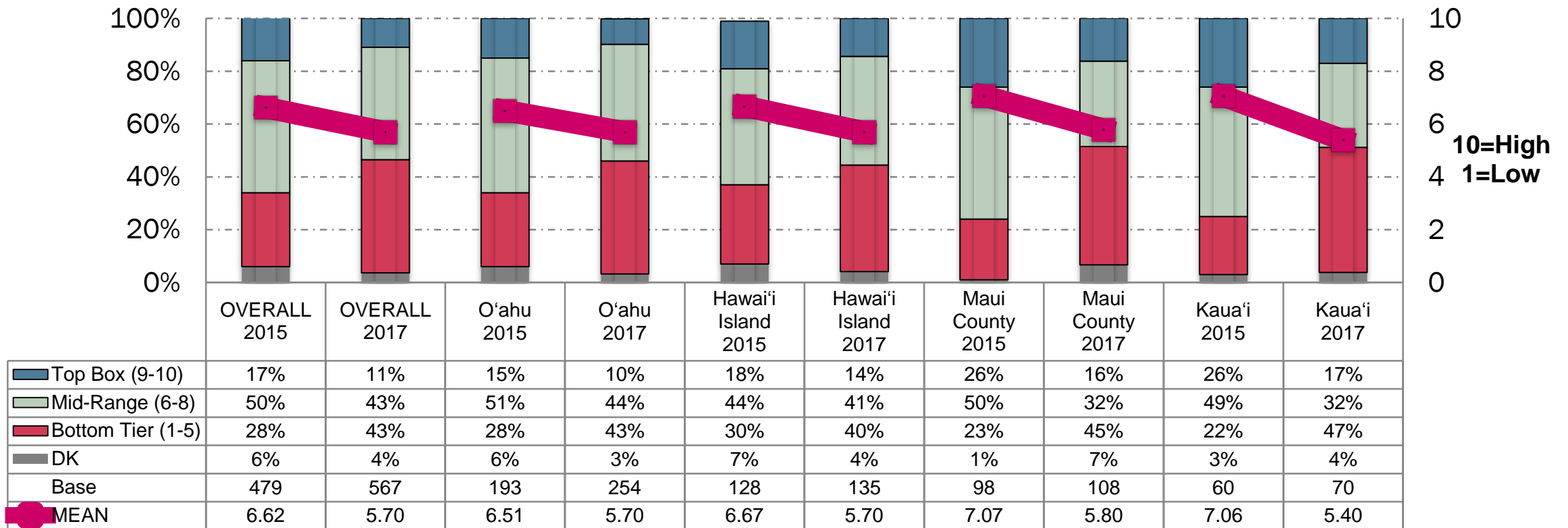
“Enhancing the competitiveness of Hawai'i as a destination”

– *By Island*



Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:

“Balancing the needs of the residents with the expectations of visitors and protecting the resources of Hawai‘i” - – *By Island*

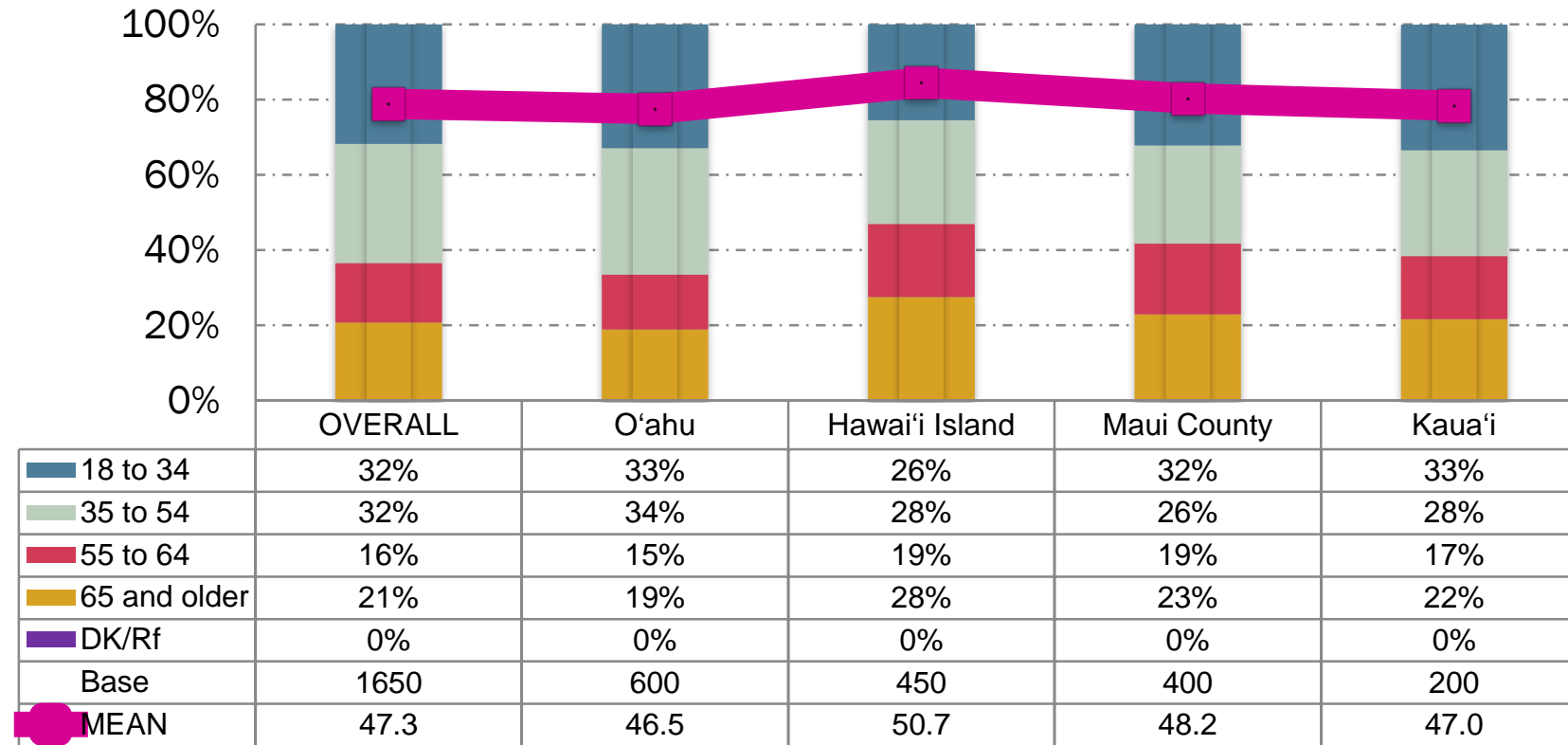


Q. Using a scale of 1 to 10 where 10 means you think the HTA is doing an excellent job and 1 means you think HTA is doing a poor job, how would you rate the job HTA is doing in:



Appendix: Respondent Profile

Respondent Age



Q.What was your age on your last birthday?

Respondent Ethnicity

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Caucasian	20%	16%	31%	30%	30%
Japanese	18%	22%	9%	8%	9%
Hawaiian	24%	23%	28%	31%	27%
Filipino	11%	10%	10%	16%	20%
Other	27%	30%	23%	15%	14%

Q.What is your ethnic background?

Household Size

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
1	14%	14%	19%	11%	12%
2	26%	25%	25%	28%	26%
3-4	34%	36%	31%	27%	35%
5+	24%	23%	23%	30%	23%
REFUSED	2%	2%	3%	4%	4%
MEAN	3.4	3.3	3.4	3.6	3.5

Q.Including yourself and any children, how many people live in your household?

Marital Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Single, never married	34%	35%	32%	33%	32%
Married	48%	48%	47%	47%	49%
Divorced, separated, widowed	15%	15%	19%	16%	14%
Domestic Partnership	<1%	<1%	1%	1%	<1%
Refused	3%	2%	2%	4%	4%

Q. What is your marital status?

Employment Status

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Yes	70%	72%	61%	65%	70%
No	30%	28%	39%	35%	30%

Q. Are you currently employed?

Occupation

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Professional	26%	29%	19%	15%	25%
Management	7%	9%	3%	5%	6%
Admin/clerical	7%	7%	5%	8%	3%
Sales	6%	5%	6%	6%	9%
Retired	17%	16%	23%	18%	16%
Other	37%	34%	44%	48%	41%

Q. What is your occupation?

Education

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
H.S. or less	24%	21%	29%	32%	26%
Bus/ Trade School/Some college	24%	21%	26%	31%	33%
College Graduate	51%	56%	43%	34%	38%

Q. What is the highest level of education you have achieved?

Household Income

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
<\$25K	6%	5%	11%	5%	8%
\$25K-\$35K	5%	4%	8%	6%	8%
\$35K-\$50K	9%	8%	11%	10%	8%
\$50K-\$75K	14%	14%	13%	10%	13%
\$75K-\$100K	15%	16%	9%	16%	18%
\$100K-\$150K	16%	18%	12%	12%	13%
\$150K-\$200K	8%	10%	5%	7%	5%
\$200K+	4%	5%	2%	4%	3%
DK/ Rf	24%	22%	30%	31%	25%

Q. Which of the following broad categories includes your household's total annual income from all sources before taxes for 2016?

Years in Hawai'i

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
Less than 10 years	8%	10%	7%	4%	6%
10 to 19 years	11%	11%	14%	10%	15%
20 years or more	25%	24%	28%	31%	23%
Born in Hawai'i	55%	56%	52%	54%	55%

Q. How many years have you lived in Hawai'i?

Gender

	OVERALL	O'ahu	Hawai'i Island	Maui County	Kaua'i
MALE	48%	49%	45%	44%	51%
FEMALE	52%	51%	55%	56%	49%

Q. Gender?



Mahalo from the OmniTrak Group