

# **2014 HTA RESIDENT SENTIMENT STUDY**

Presented to:  
Hawai'i Tourism Authority Board  
March 25, 2015

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# Executive Summary

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- Overtime, the overall general perceptions of tourism in Hawai‘i remains stable at a mean of about 8.0 on a 10 point scale.
  - When those who feel favorable toward the visitor industry are asked what they might do to support tourism, many cite “Showing aloha/ kindness to tourists”.
  - For the first time in these studies, those who do not work in the visitor industry feel more favorable toward the industry than do those who are directly employed in the visitor industry.
- O‘ahu respondents feel more positive about the impact of tourism on the state than do their Neighbor Island counterparts. However, Hawai‘i Island and Kaua‘i respondents’ perceptions are increasing in this category.
- In general, Neighbor Island respondents feel more positive about the impact that tourism has on themselves and their families than O‘ahu residents.
- Neighbor Island respondents are more likely to agree that tourism brings well paid jobs to their islands than O‘ahu residents.

# Executive Summary – continued

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- Respondents feel that tourism creates shopping, restaurants, and entertainment opportunities for residents more so than creating jobs that pay well or have the opportunity for advancement.
- Another positive finding is that respondents react favorably to the statement “Tourism in Hawai‘i reminds me that we have a unique culture to share with visitors”.
- Culturally and recreationally, Maui respondents are less likely to feel that tourism benefits their island.
- Overall and over time, respondents’ perception that tourism brings more benefits than problems to Hawai‘i is decreasing.
- Respondents are reacting more strongly to the statement “This island is being run for tourists at the expense of local people”.
- “I feel like I have a voice in my island’s tourism development decisions” was the least agreed with statement.

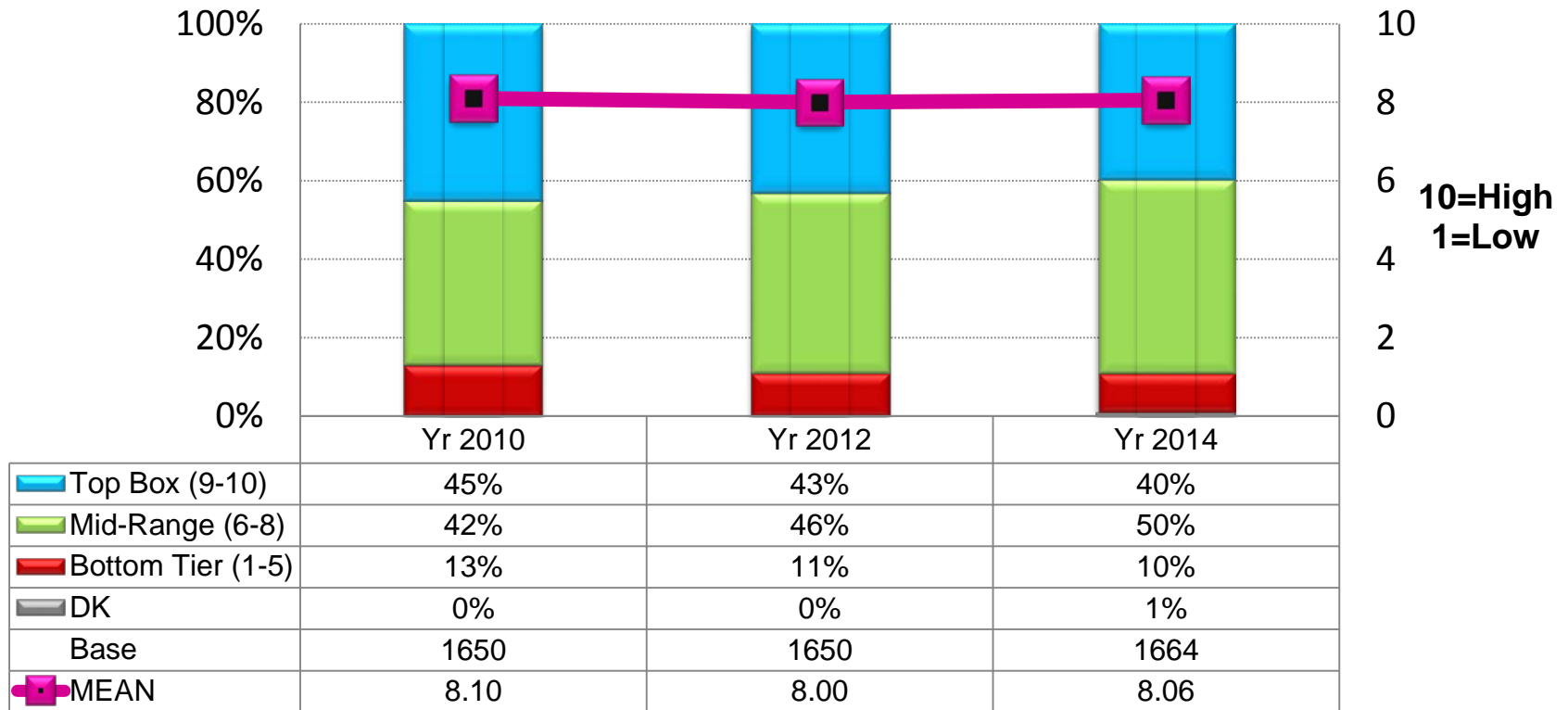
# Executive Summary – continued

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- Three quarters of respondents have heard of the Hawai'i Tourism Association.
  - Just 53% of young adults under 35 had heard of the Hawai'i Tourism Authority prior to taking part in the study.
  - Aided awareness of HTA increases as respondents become more affluent.
  - Those residents with a college degree were more likely to have prior name awareness of HTA.
- Marketing and promotion of tourism is viewed as HTA's main function.
- Most respondents understand that tourism drives Hawai'i's economy.
- Neighbor Island respondents are more likely to be employed in the tourism industry.
- Respondents have or plan to travel in 2014 to the neighbor islands (52%), mainland (57%) or internationally (20%).

# Perception of Tourism Industry in Hawai'i-

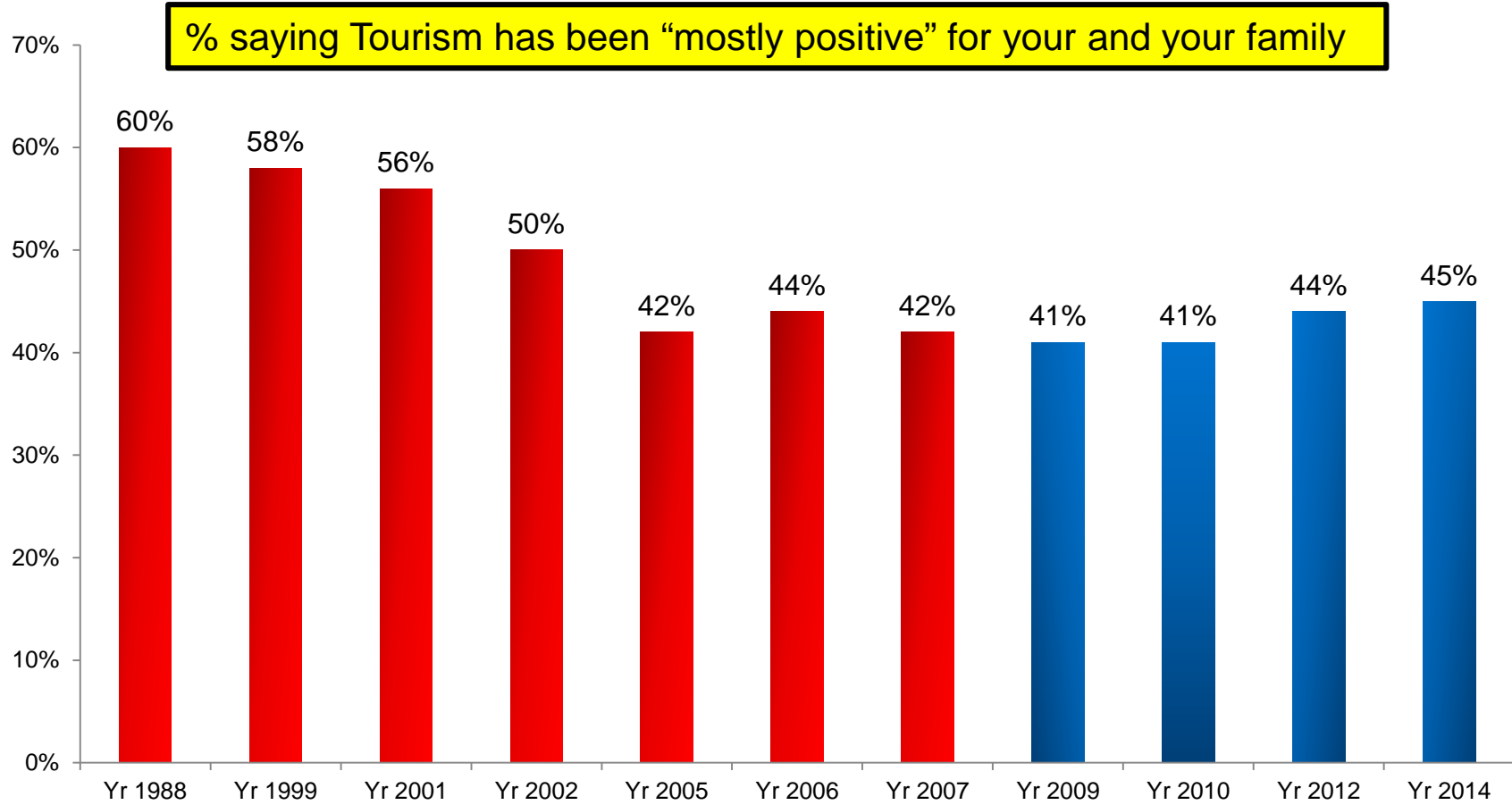
## Overall



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?

# Impact of Tourism on You & Your Family-

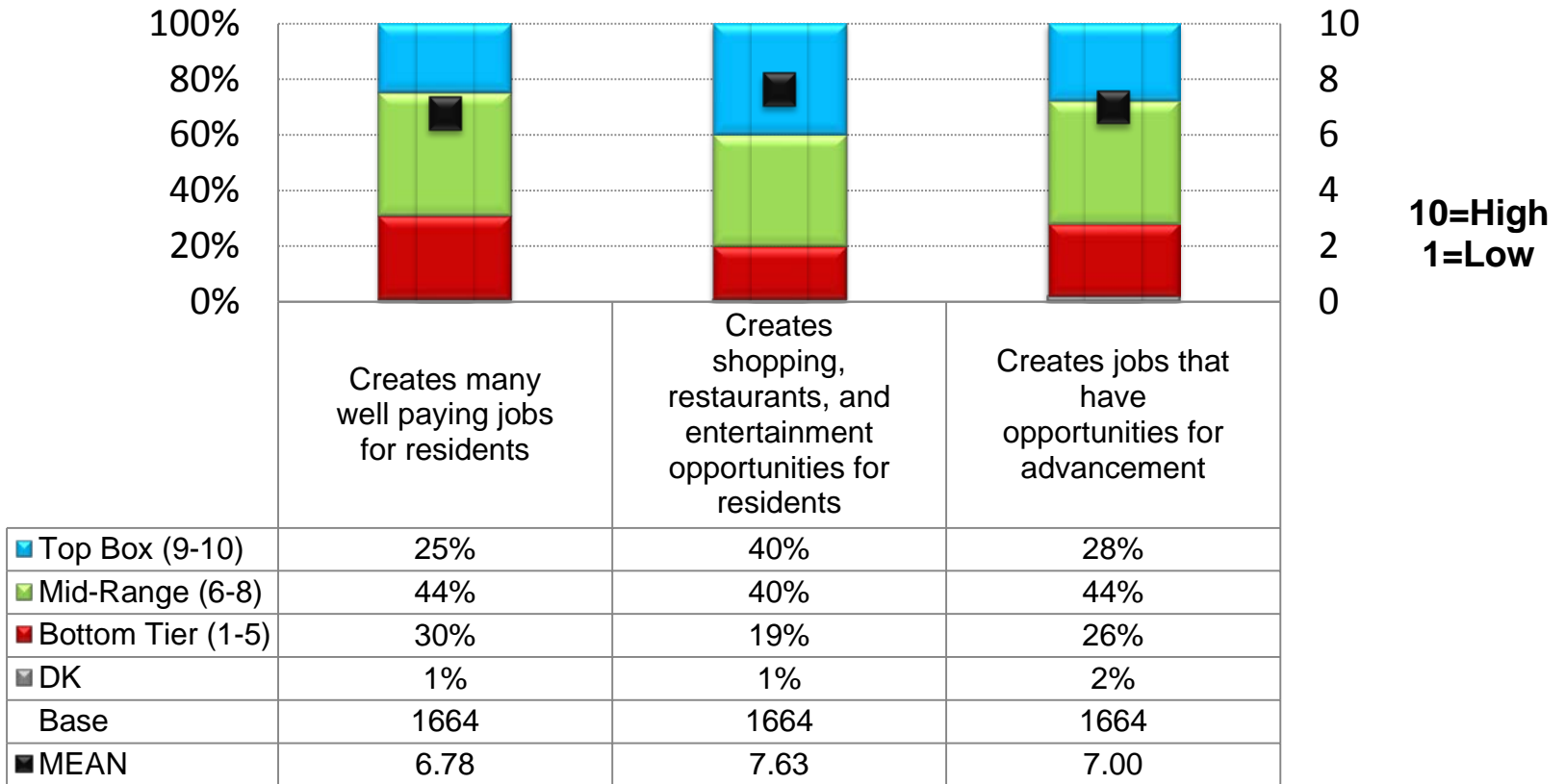
## Overall



In order to track the data (change in rating scale) from 2009 on a rating of 7-10 was used to approximate the percent that felt positively about this statement.

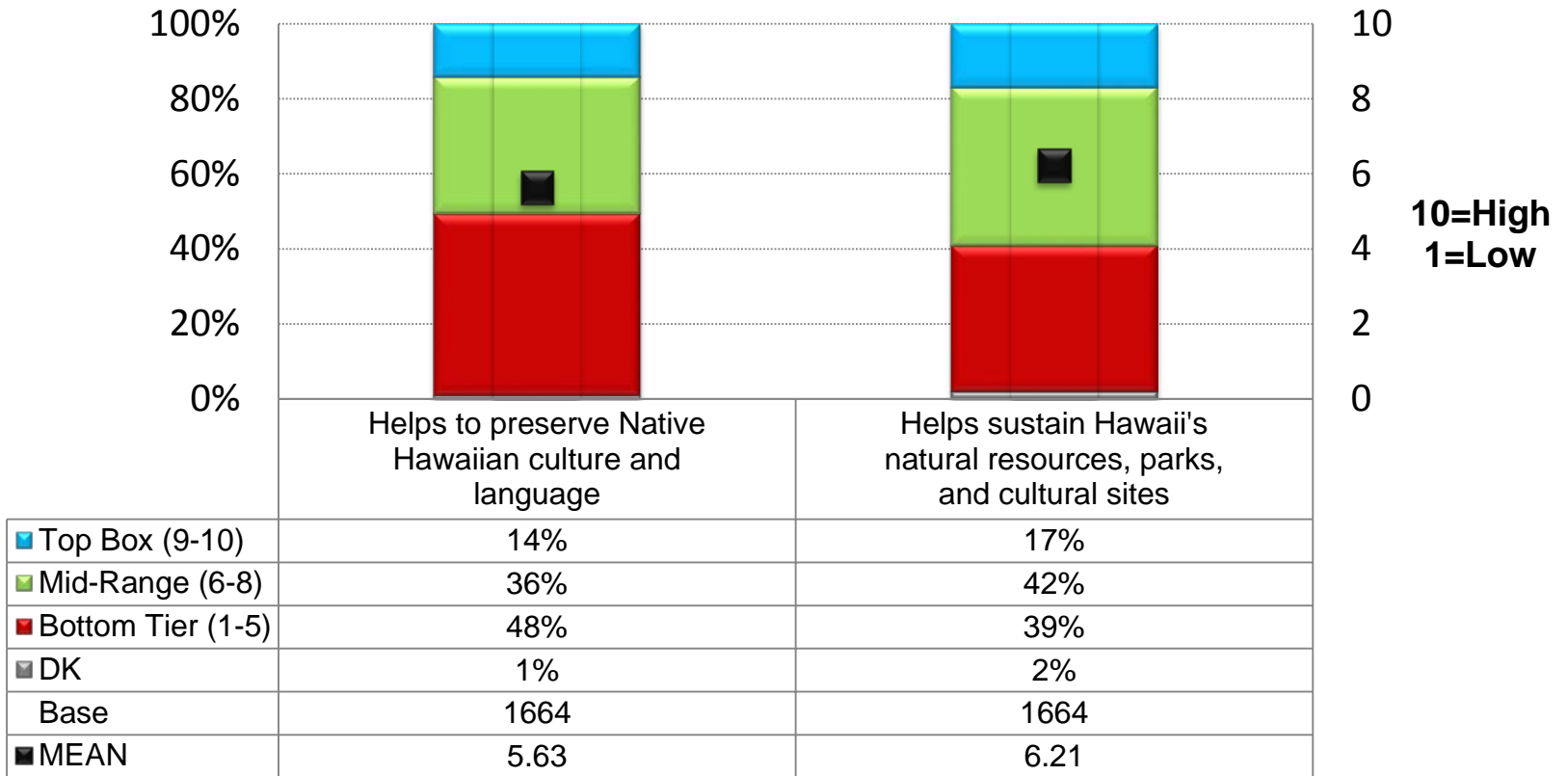
Q. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

# Tourism Benefits - Economic



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?

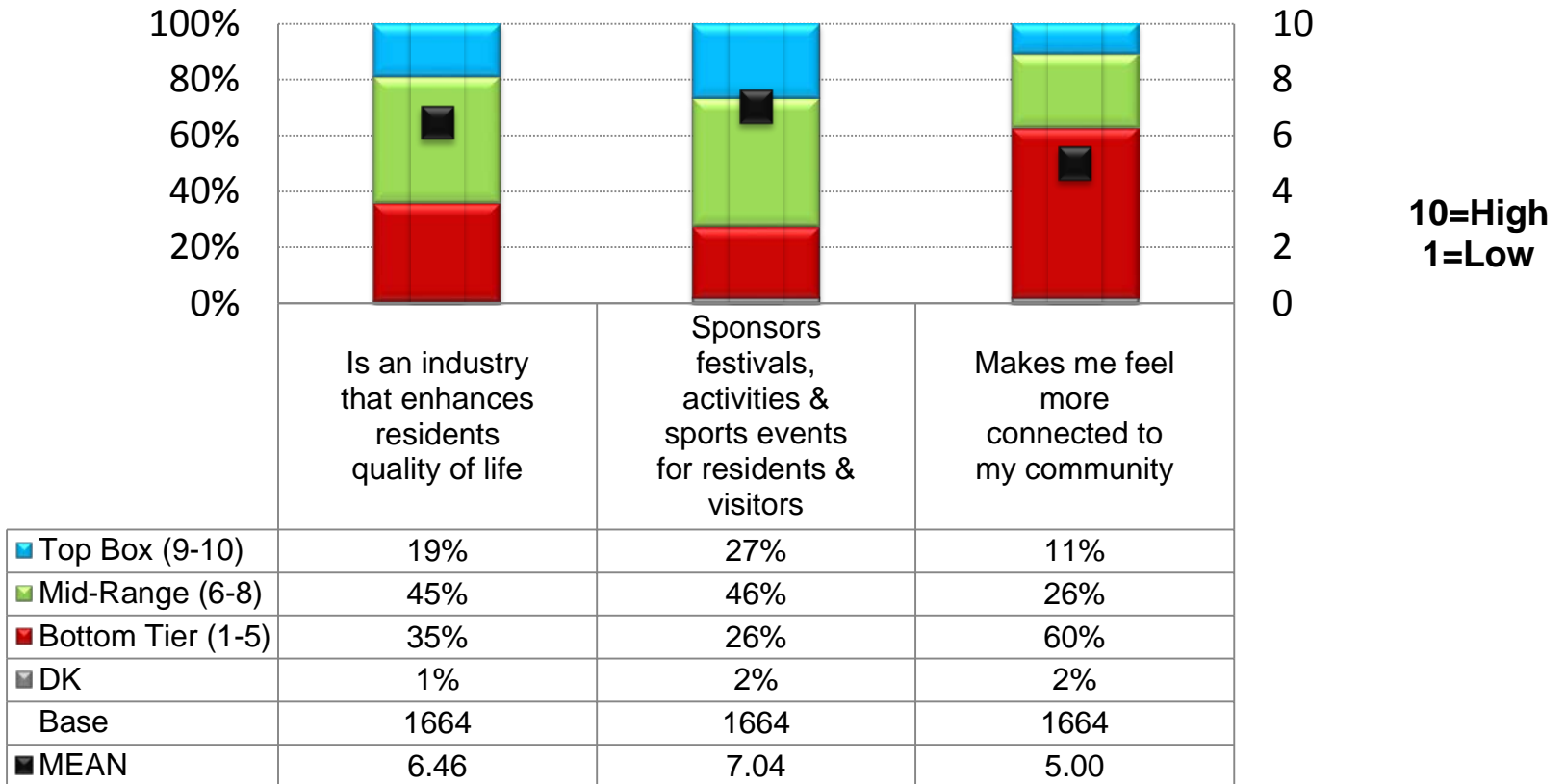
# Tourism Benefits – Cultural/ Recreational



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?

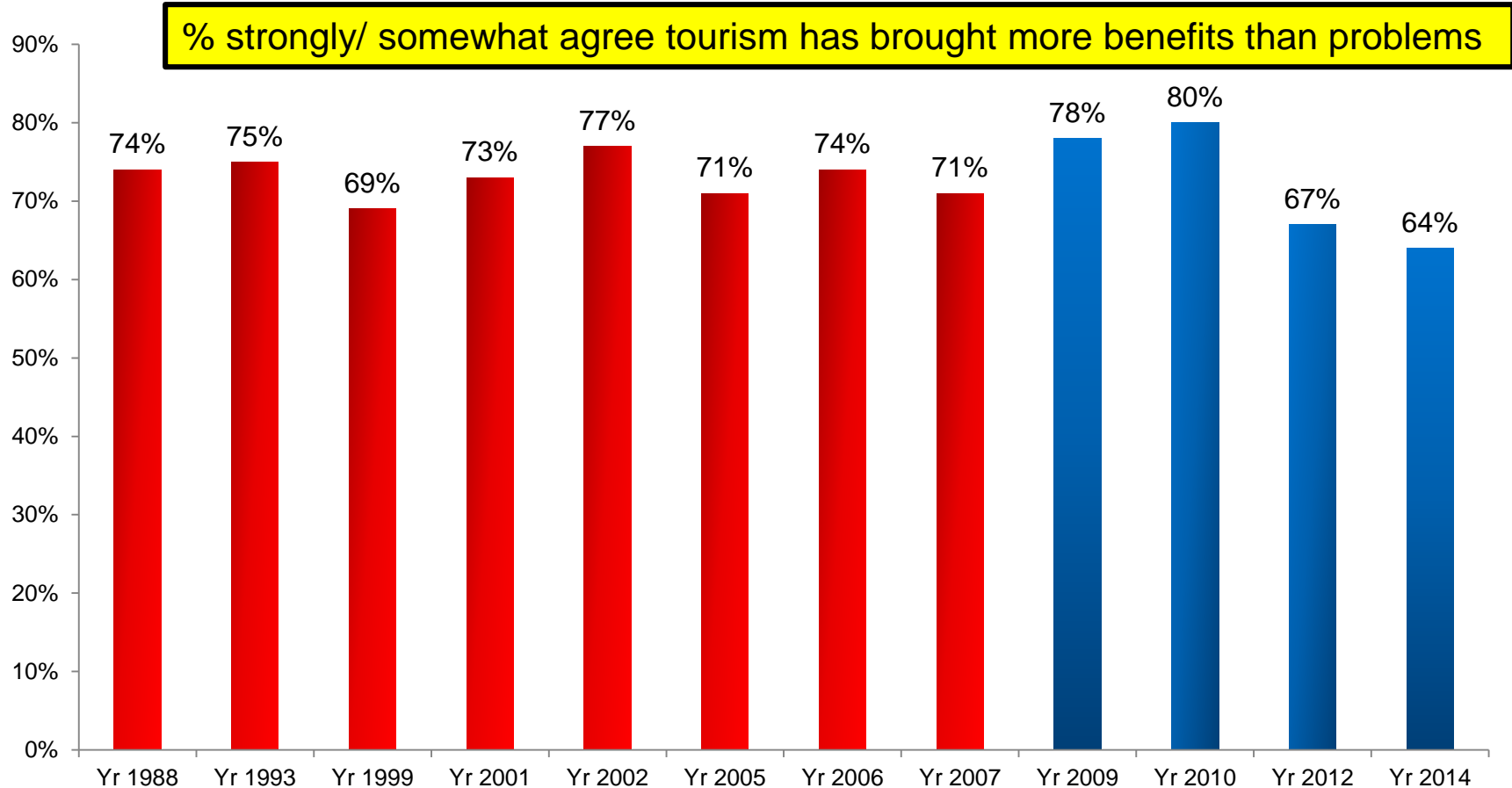


# Tourism Benefits – Lifestyle



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?

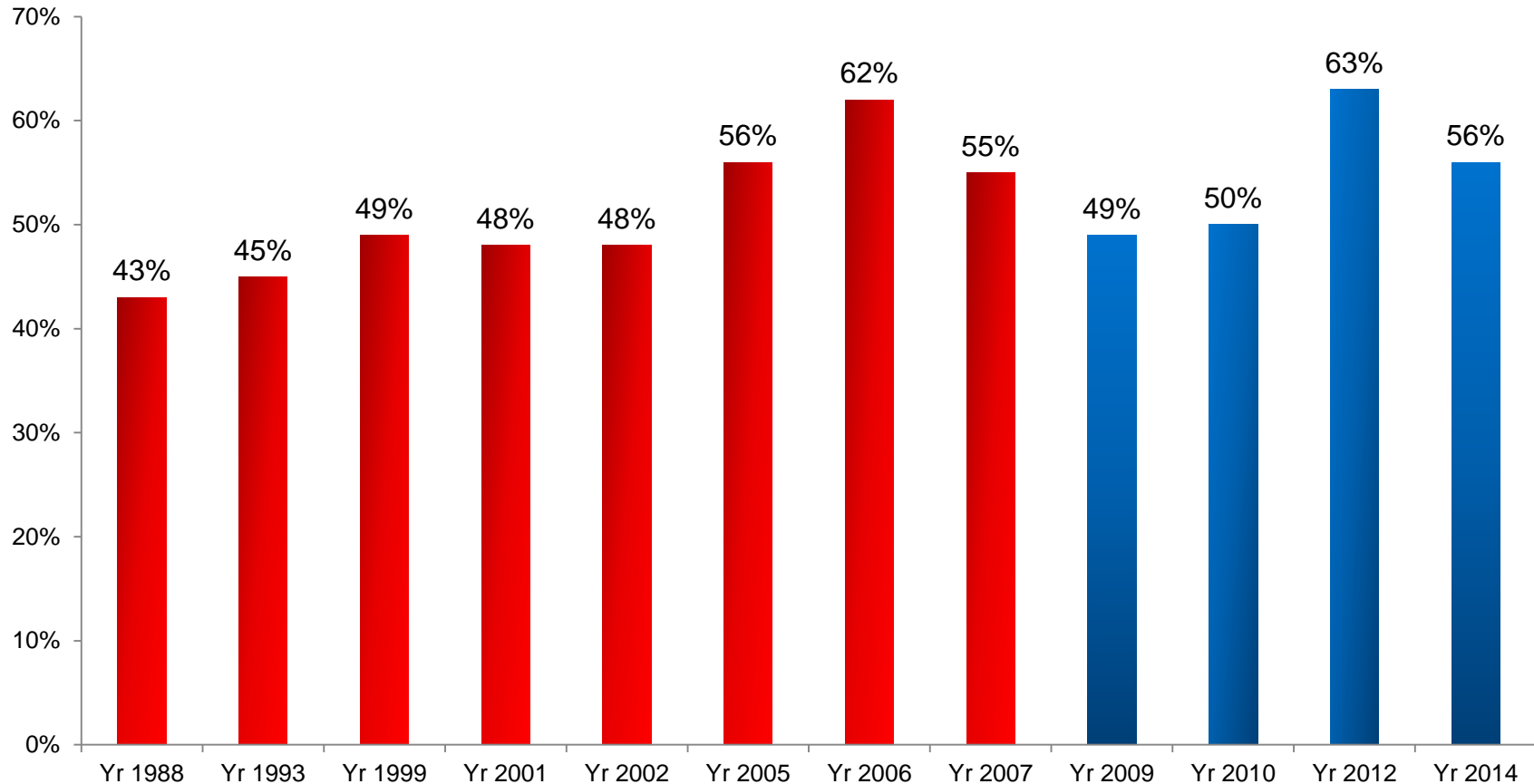
# Tourism has brought more benefits than problems - *Overall*



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.

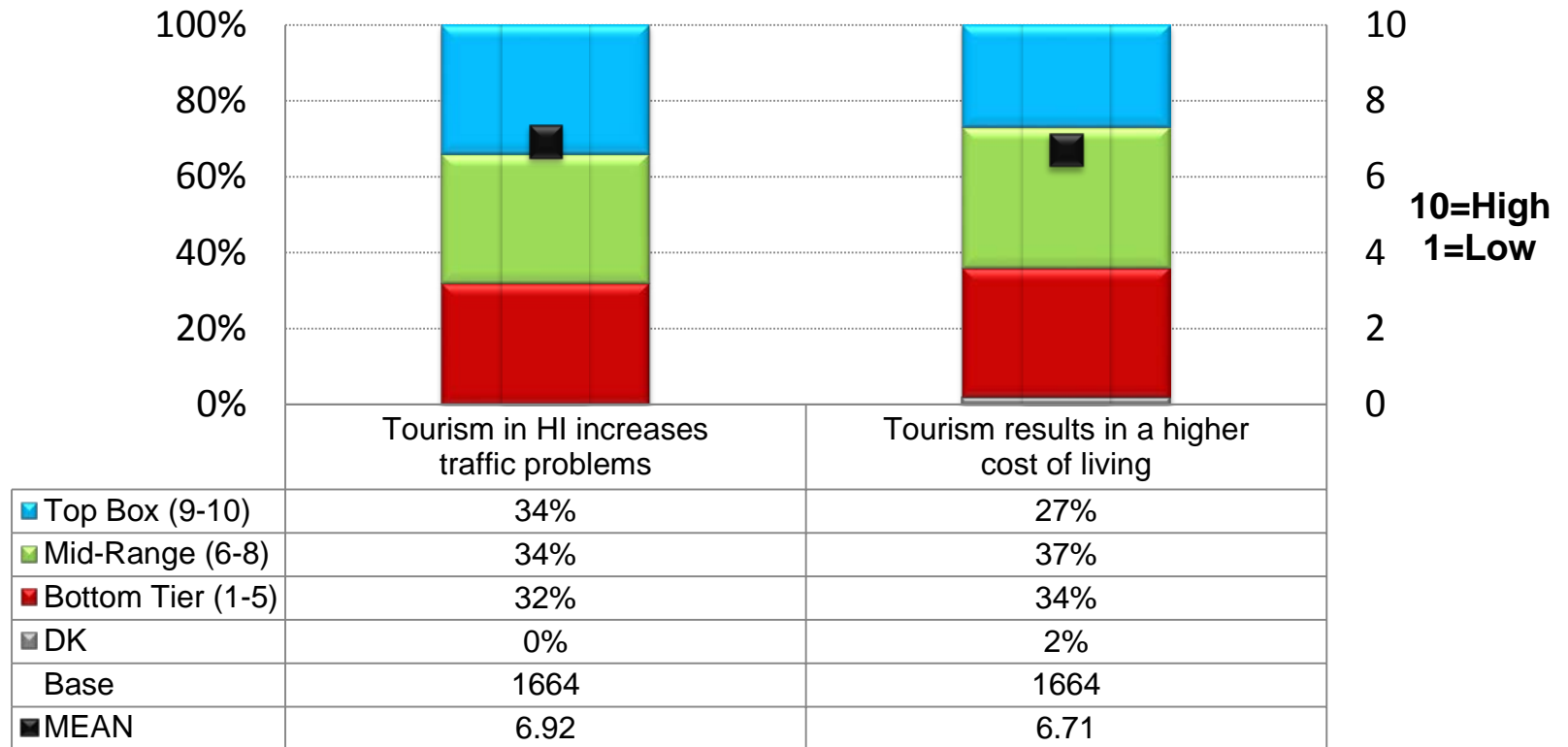
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

# This island is being run for tourists at the expense of local people – *OVERALL*



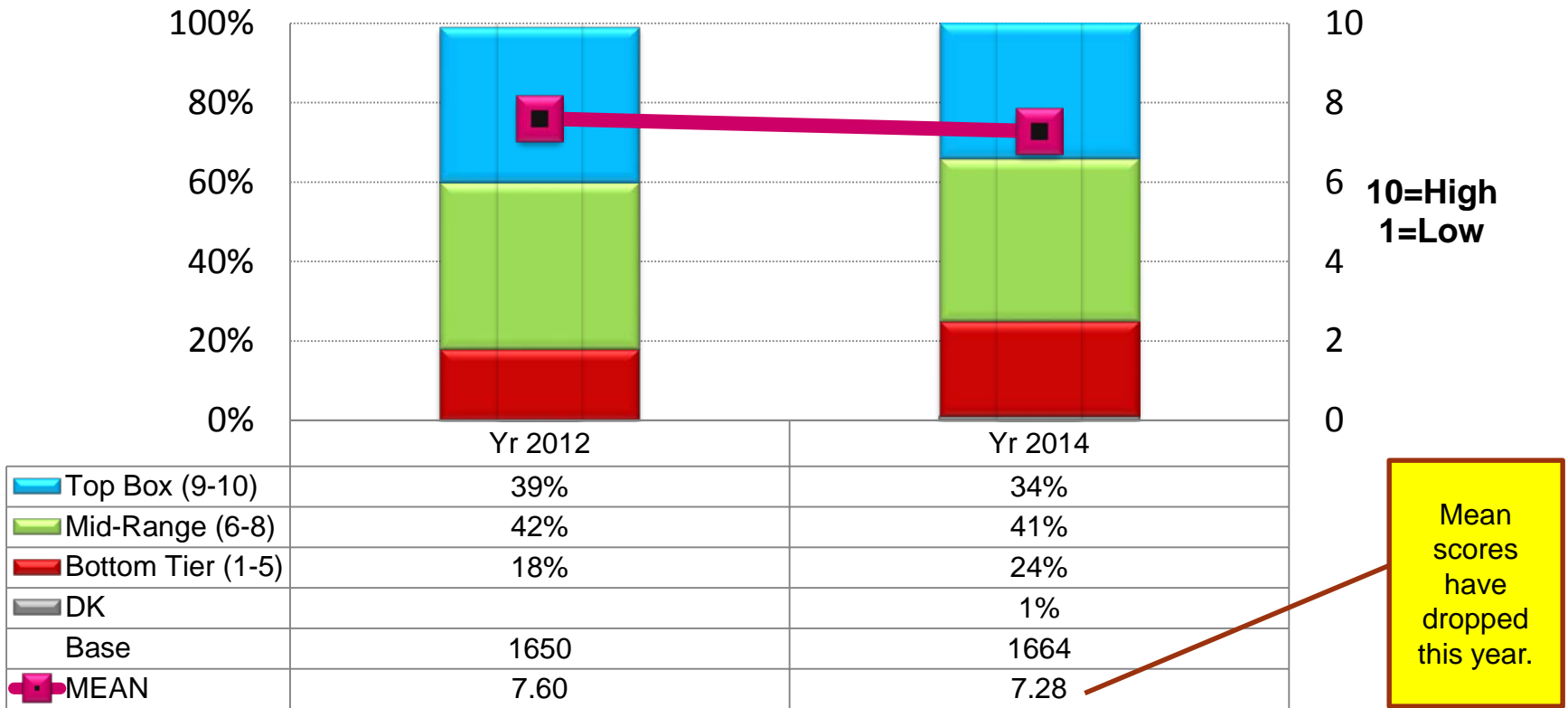
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

# Traffic/ Cost of living



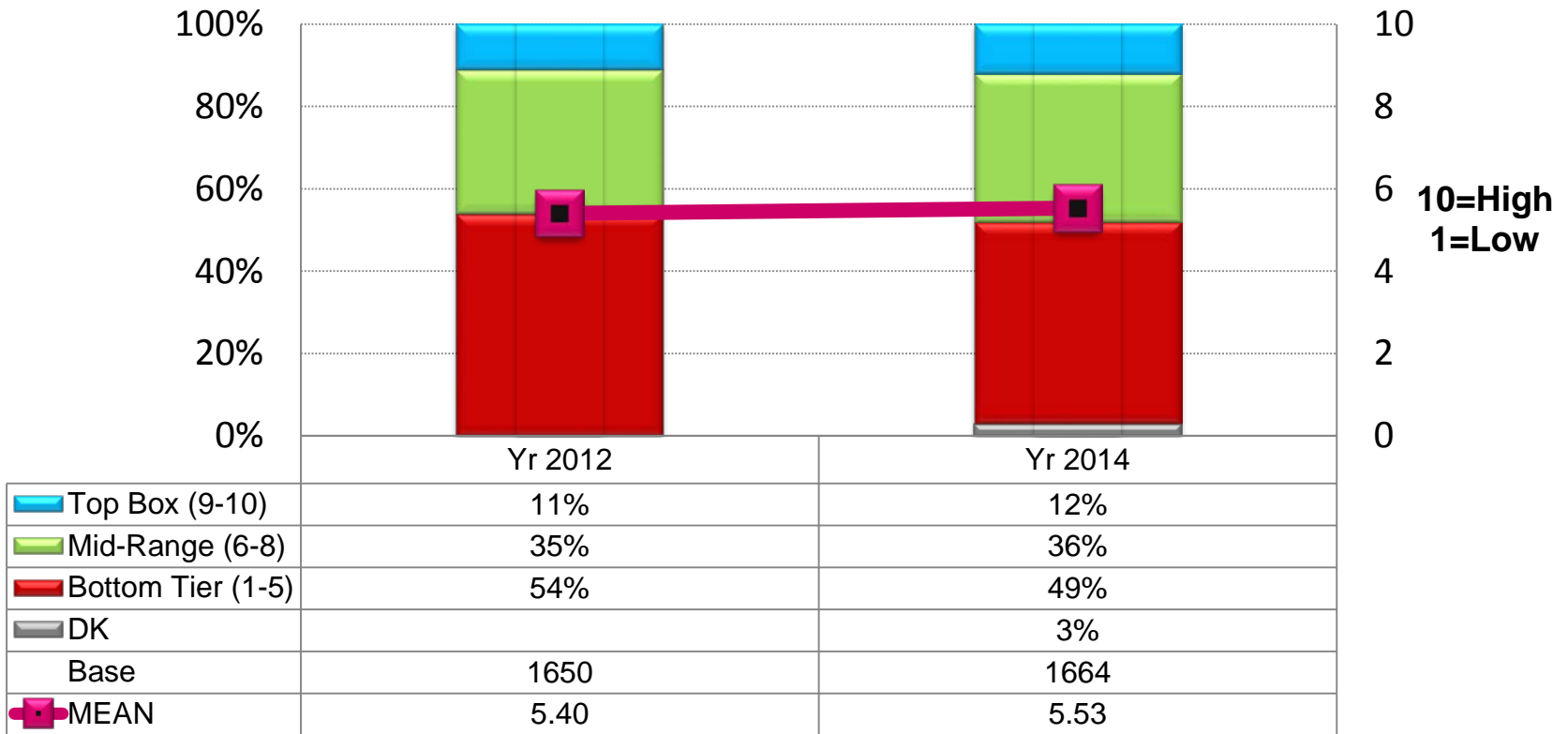
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

# My Island's economy is too dependent on tourism— *OVERALL*



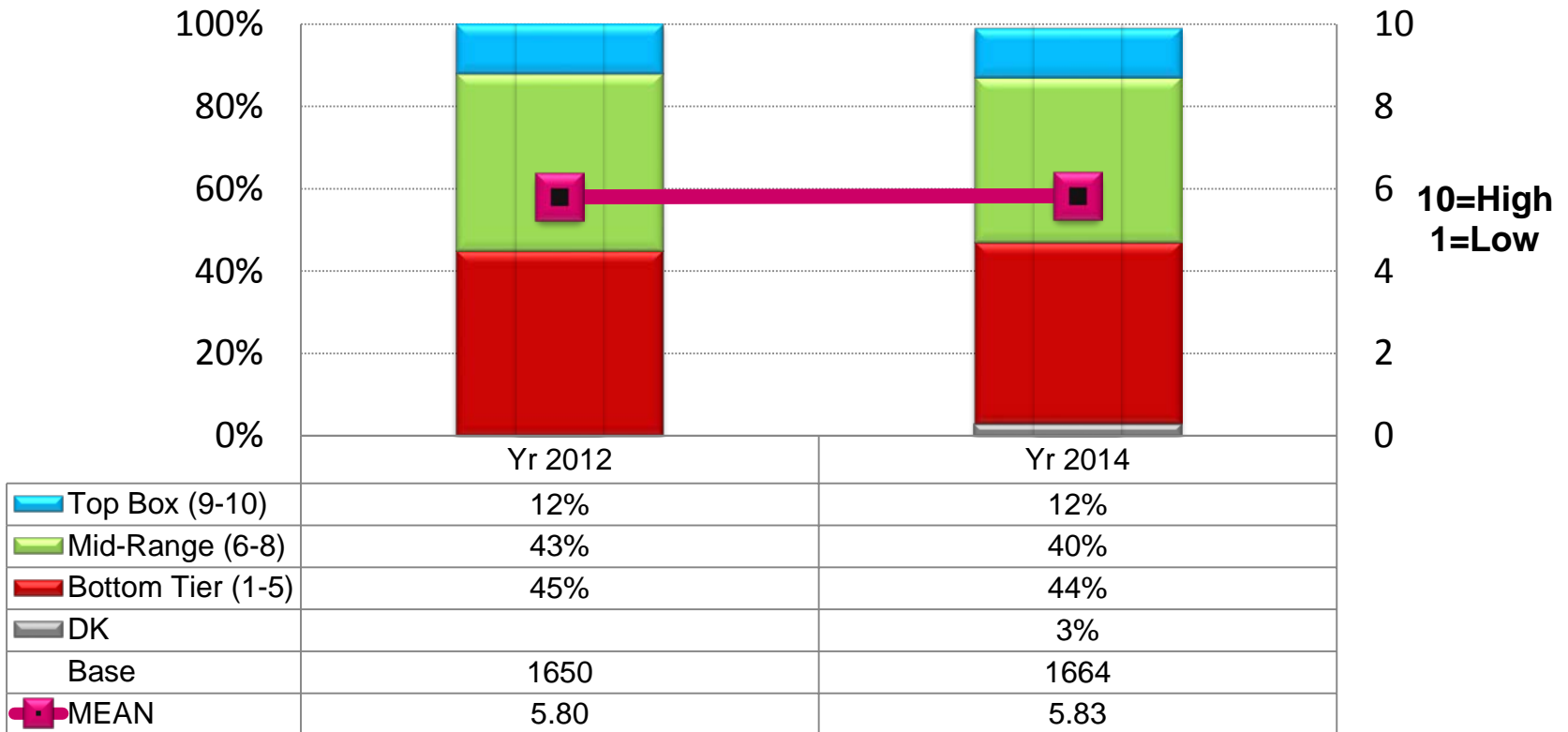
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

# Tourism currently presents Native Hawaiian culture in an authentic manner– ***OVERALL***



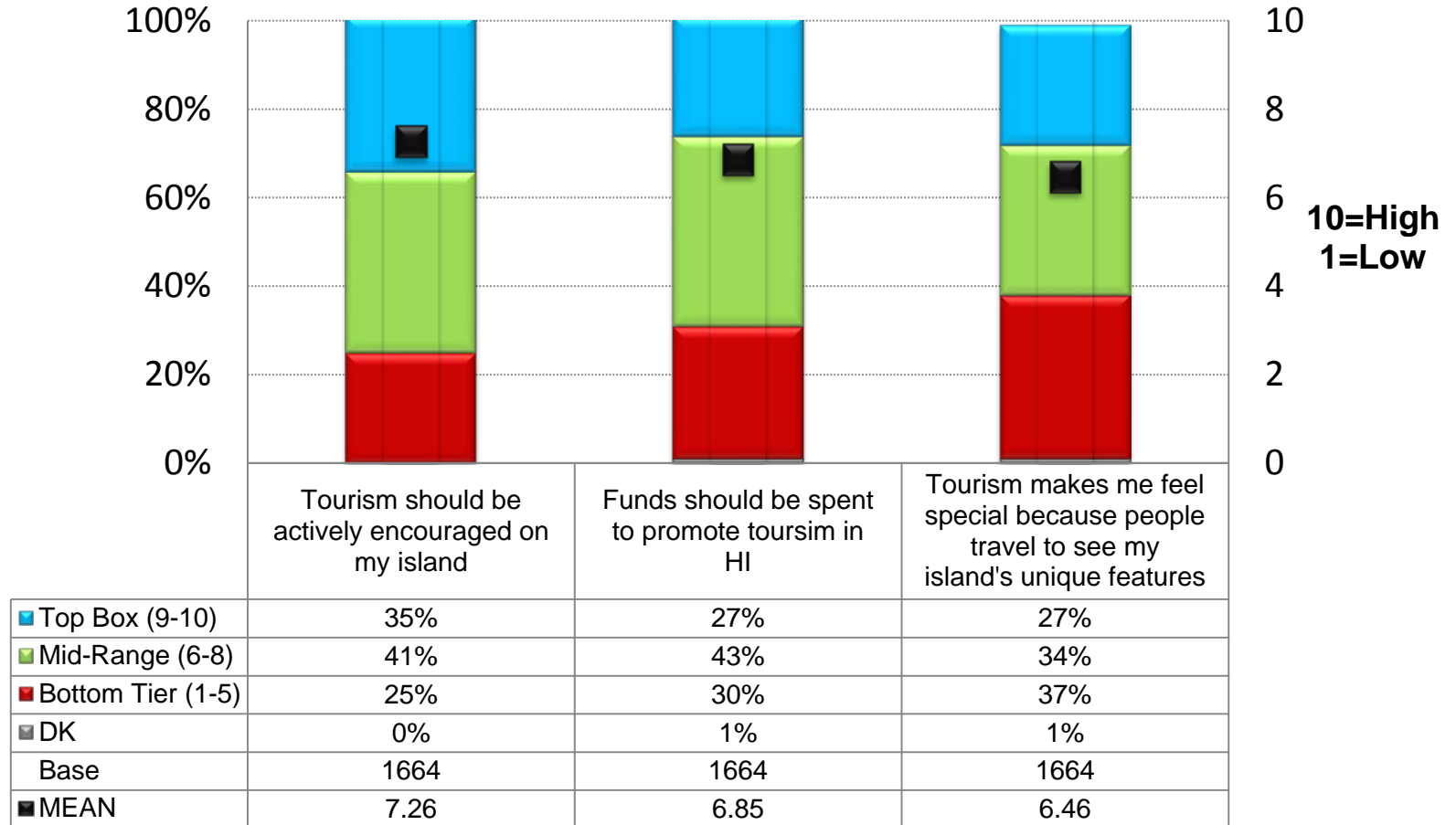
Q. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

# Tourism 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...?

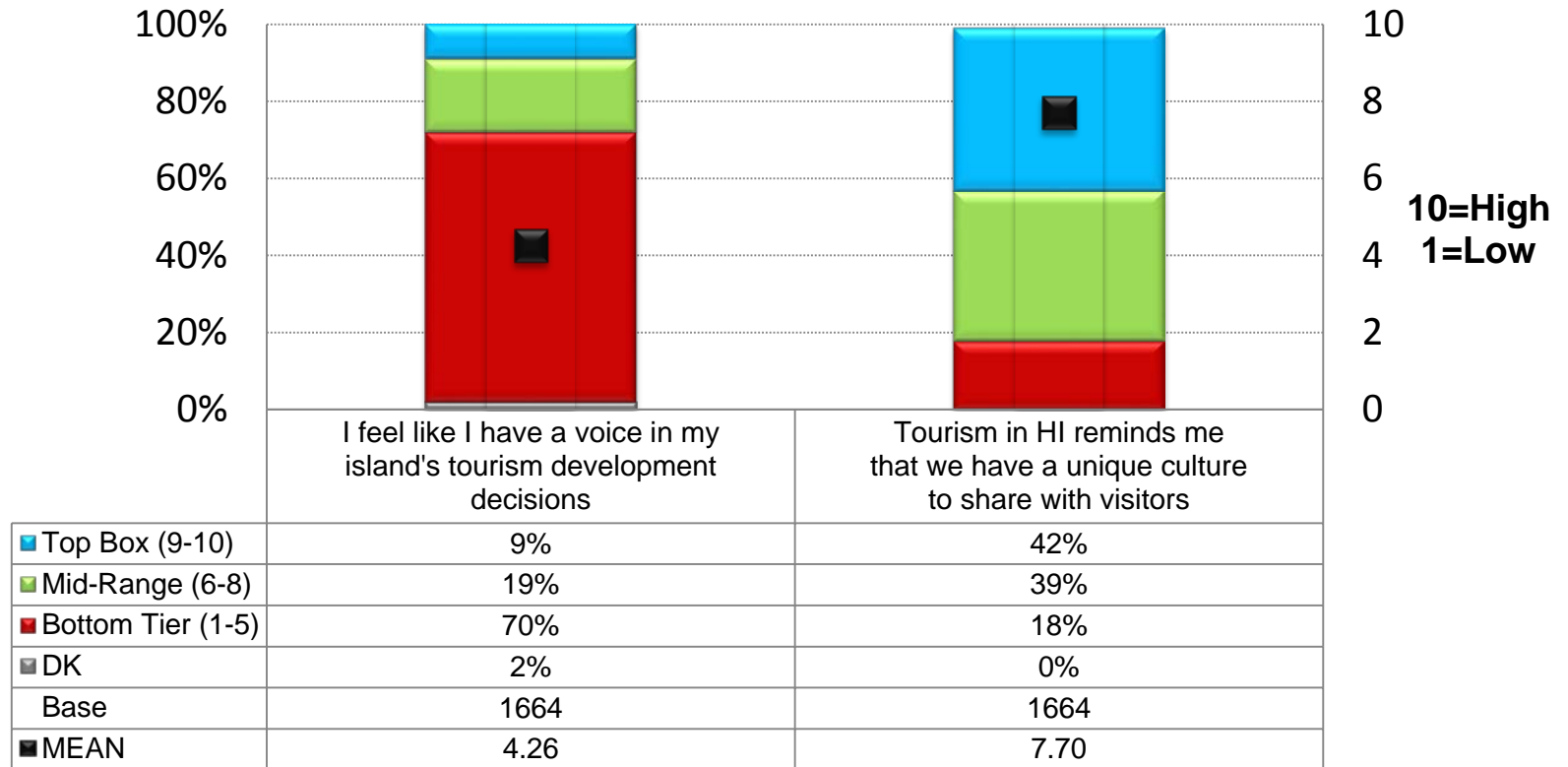
# Encouraged/ Funding/ Feel special



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...?



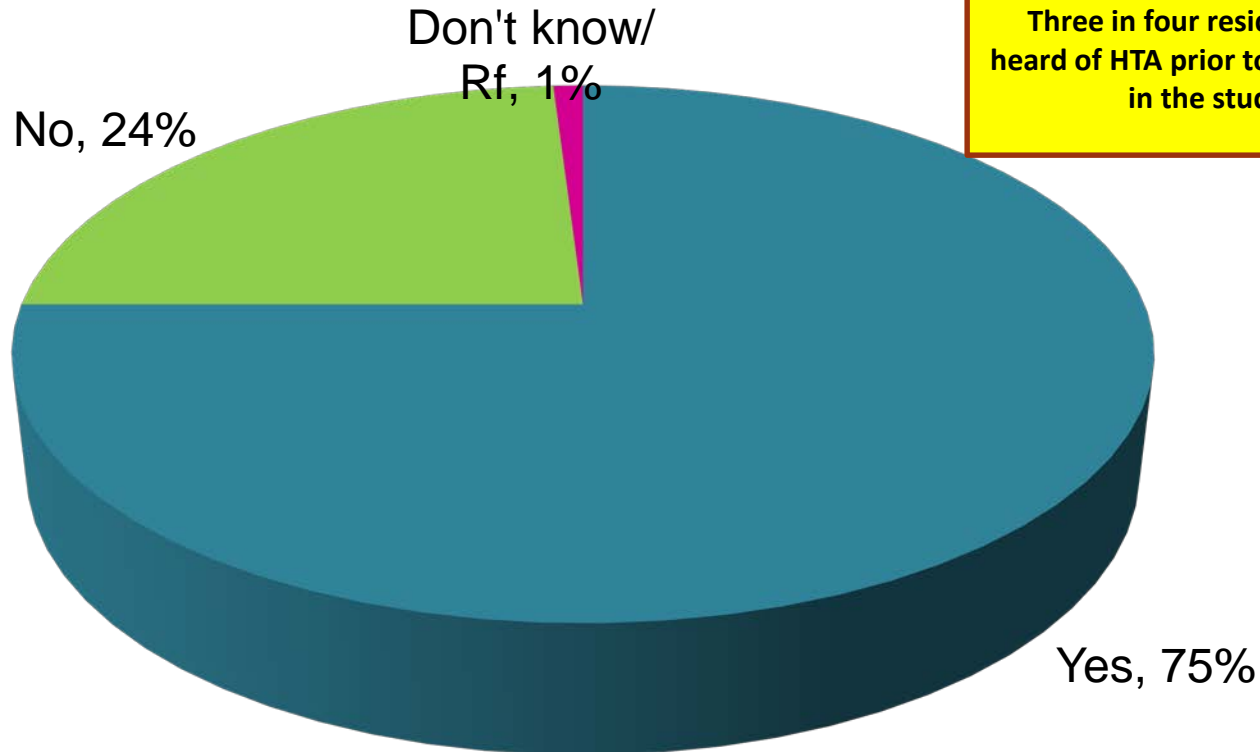
# A voice/ Unique culture



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...?

# Hawaii Tourism Authority AIDED NAME AWARENESS

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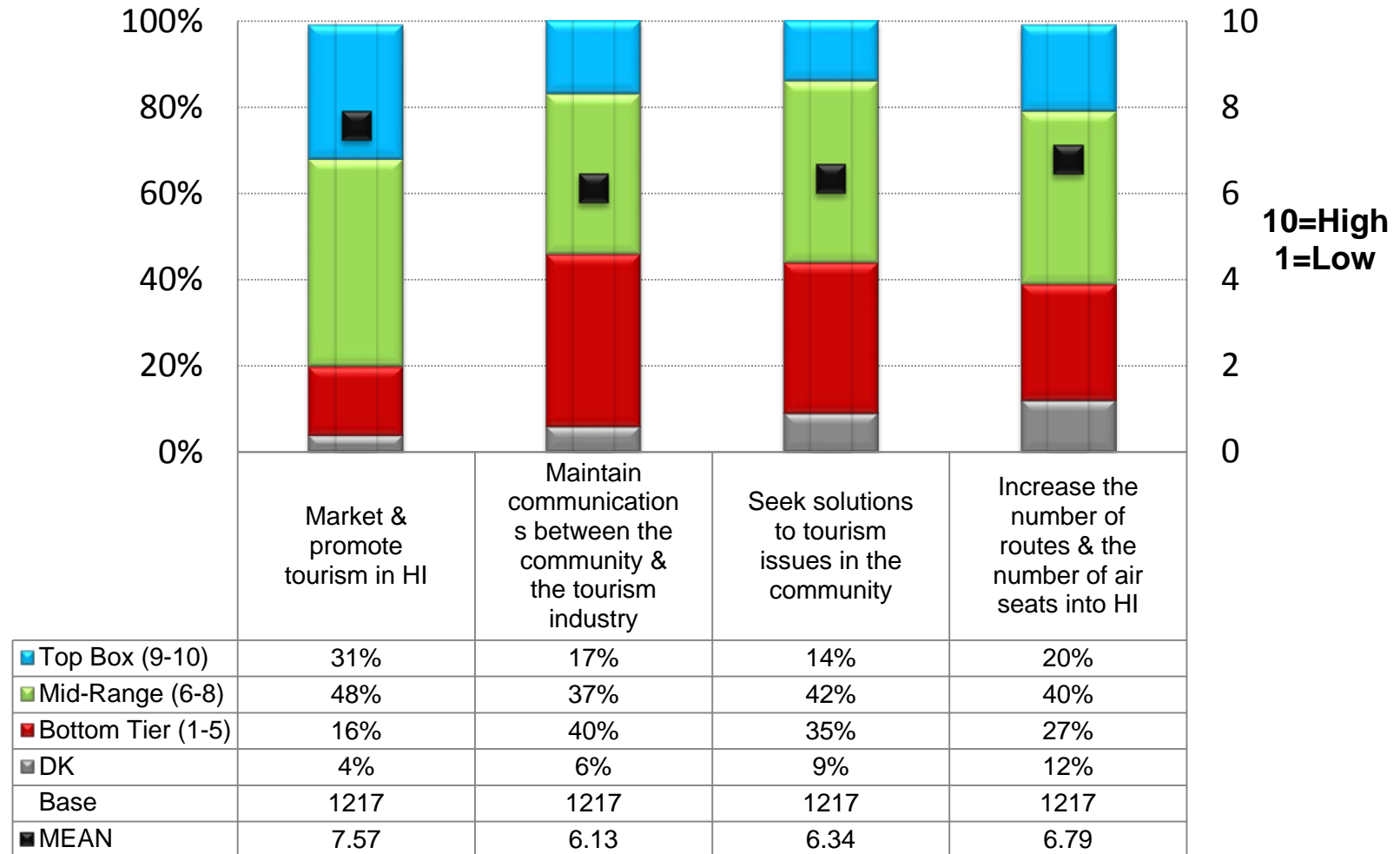
Q. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

# HTA - PERCEIVED DUTIES (UNAIDED)

	OVERALL	O'ahu	Hawai'i	Maui Cnty	Kaua'i
Promote tourism/ Hawai'i	70%	70%	69%	69%	66%
Don't know	9%	9%	8%	13%	13%
Bring money into the State/ benefit economy	6%	6%	7%	4%	8%
Market research/ data collection	5%	5%	8%	5%	3%
Assist tourists in need/ help in emergencies, crisis	5%	5%	4%	3%	7%
Support, sponsor events/ organizations	4%	5%	3%	6%	5%
Taxpayer funded/ spending too much	4%	4%	4%	4%	9%
Support, sponsor, promote- Hawaiian culture	3%	4%	4%	2%	3%
Manage/ coordinate tourism marketing	3%	4%	3%	4%	3%
Regulates tourism industry	3%	4%	3%	2%	1%

Q. What do you think the HTA does?

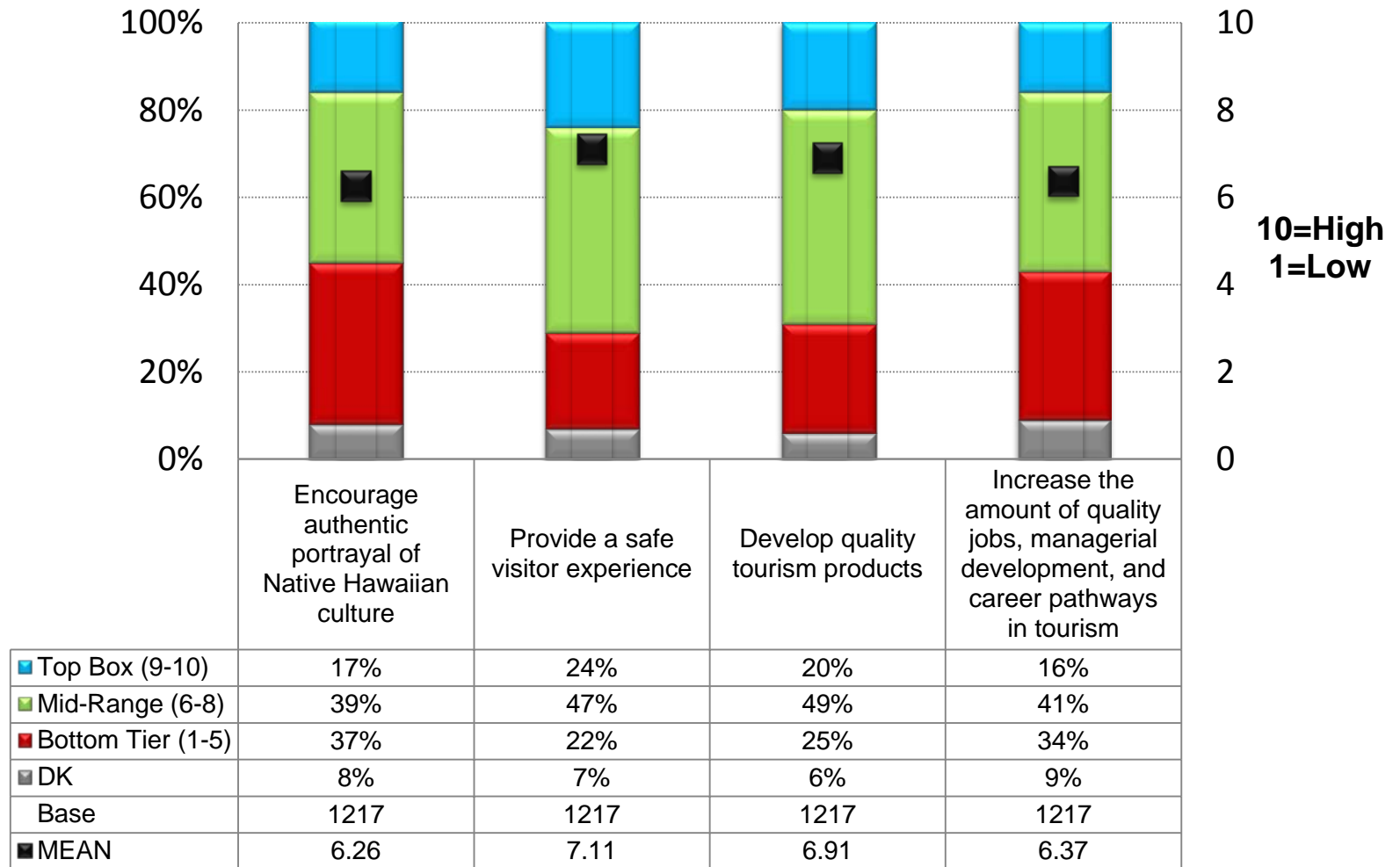
# Promotion/ Communications/ Solutions/ Routes



Q. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of the Hawai'i Tourism Authority and their work to:



# Authenticity/ Safety/ Quality/ Jobs



Q. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of the Hawai'i Tourism Authority and their work to:



**Thank You**