



Stakeholder Survey

SMARInsights

Overview

One part of the HTA Governance Study was a survey designed to provide a format for input from a wide group of stakeholders.

The goals of the study include:

- Assessing stakeholder perception of HTA;
- Determining the attitudes of stakeholders regarding the impact of tourism in Hawai'i;
- Gathering information on what is important to stakeholders regarding an organization that is managing tourism in the state;
- Exploring elements of how the organization managing tourism in the state should be structured, and how it should prioritize its activities.

The survey was developed to address these issues and then several options were deployed to gather widespread feedback. The survey was available online and access was promoted so that stakeholders could provide feedback. In addition, several specific links were provided to allow different groups such as each county to distribute the link to get more feedback.

In total there are 619 completed surveys and another 71 partial surveys (total 690) included in this analysis.

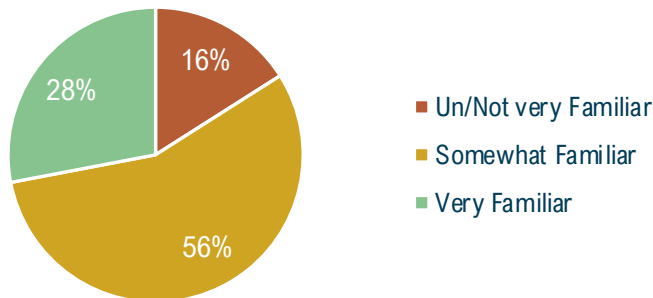


Perceptions of HTA

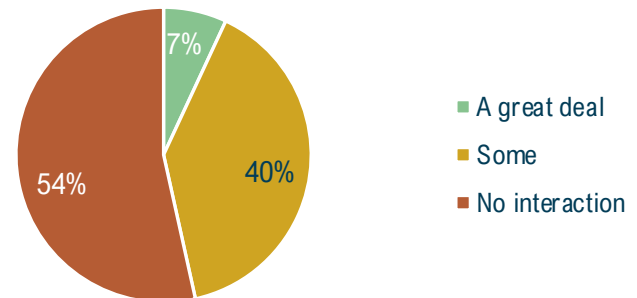
HTA Familiarity

- HTA has not established a strong presence among stakeholders. Only 28% indicate that they are “very familiar” with the agency.
- Most respondents were “somewhat familiar” with the Hawai’i Tourism Authority, although 16% indicated that they were either unfamiliar or not very familiar.
- The majority (54%) had no interaction with HTA in the past year.
- This lack of presence means that HTA is being judged by people who don’t have a great deal of knowledge about the organization. This suggests that more stakeholder outreach is warranted.

Familiarity with HTA



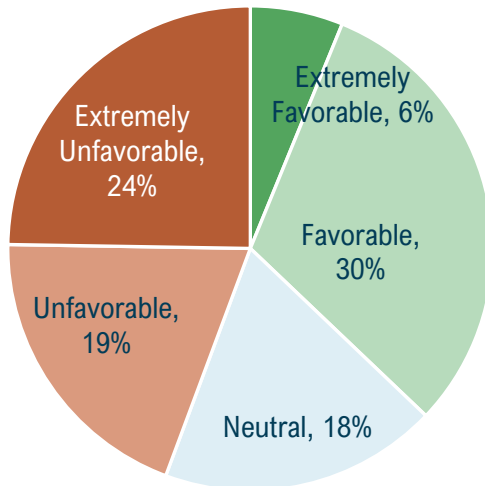
Interaction with HTA (Past Year)



HTA Rating

- The overall rating for HTA is more negative than positive, with a mean rating of **4.7** on a **10-point scale** – and 43% of the respondents giving an unfavorable rating.

Favorability of HTA



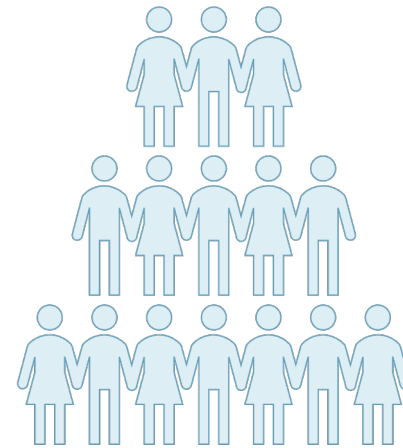
The image of HTA is **negative** among stakeholders, with few being “extremely favorable.”

This highlights the need for major changes at the organization. It has lost the confidence of its stakeholders and minor adjustments will not be enough to reverse the negative perceptions and attitudes about the organization.

Main Negative Perceptions

Stakeholders were asked to clarify their rating of HTA and several themes emerged concerning their negative perceptions. This highlights that many of the concerns with HTA are more focused on concerns about tourism overall, and that HTA is not adequately addressing these concerns. The following list presents common concerns in order from most frequent to least accompanied by their negative rating percentage:

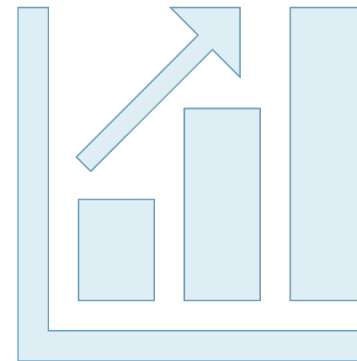
1. Over-tourism and strain on infrastructure and local resources (~15%)
2. Impact on residents' quality of life (~15%)
3. Concerns about over-reliance on tourism (~12%)
4. Inefficiency and mismanagement (~12%)
5. Insufficient attention to small businesses and local needs (~10%)
6. Perceived negative government influence and overregulation (~8%)
7. Lack of long-term strategic planning (~8%)
8. Imbalance in focus among different regions or Islands (~8%)
9. Disproportionate emphasis on Oahu or certain tourist areas (~7%)
10. Political challenges and controversies (~5%)



Main Positive Perceptions

Stakeholders were asked to explain their rating of HTA and several themes emerged to explain the positive perceptions. The following are presented from most mentioned to least, and percentages are of those who gave a positive rating:

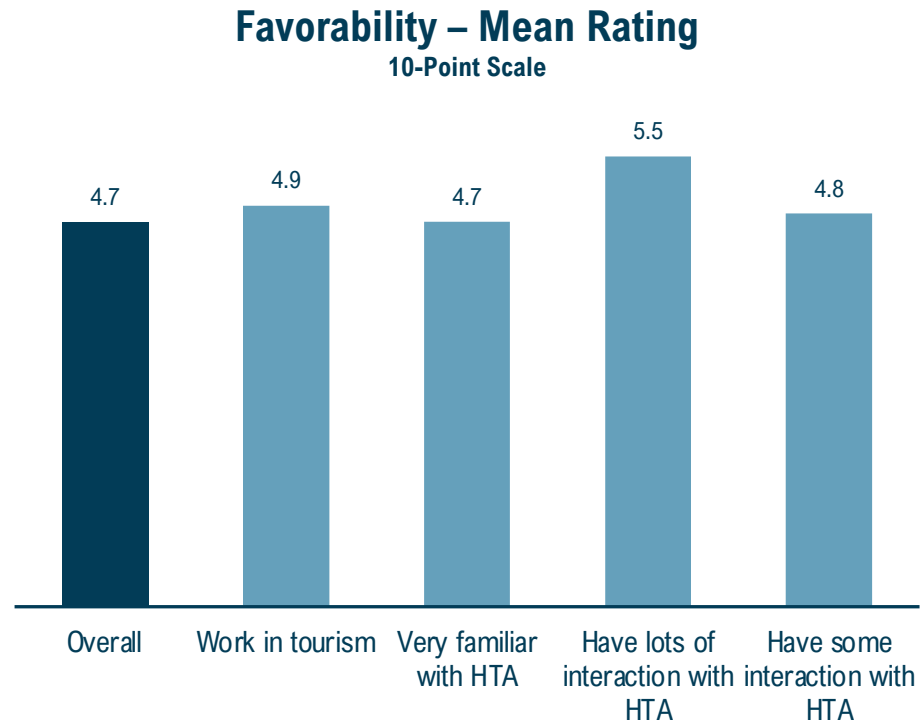
1. Economic growth and tourism promotion (~15%)
2. Responsiveness to industry and community needs (~15%)
3. Preservation of natural resources and environment (~10%)
4. Cultural education and protection (~10%)
5. Efforts toward regenerative and sustainable tourism (~10%)
6. Effective communications and advocacy (~5%)
7. Emphasis on authentic experiences and respect for Aina (~5%)
8. Organizational independence and avoidance of politics (~5%)
9. Professionalism and expertise in tourism (~5%)
10. Community support and volunteerism (~5%)



HTA Rating

A striking finding was that there was not very much variation across groups in terms of their image of HTA.

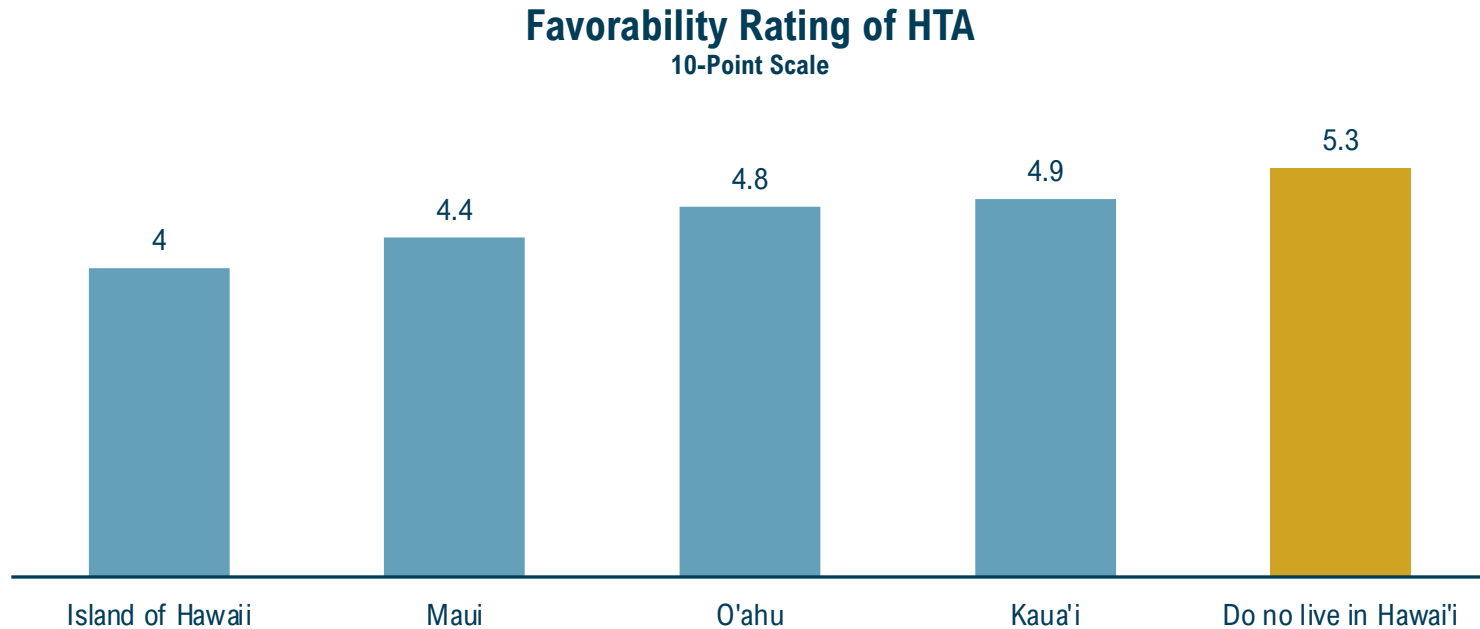
- The most positive group was those who indicate that they have lots of interaction with HTA – but their evaluation was still only slightly positive.
- Those “very familiar” with HTA were more negative than those who were less familiar.
- Those who work in tourism were only slightly more positive –and the overall rating was still negative.



HTA Rating by Island

There are also differences based on where people live.

People who do not live in Hawai'i have the most positive image – although it is just slightly stronger than neutral. The rating among all those who live in Hawai'i is more negative than positive.



Summary

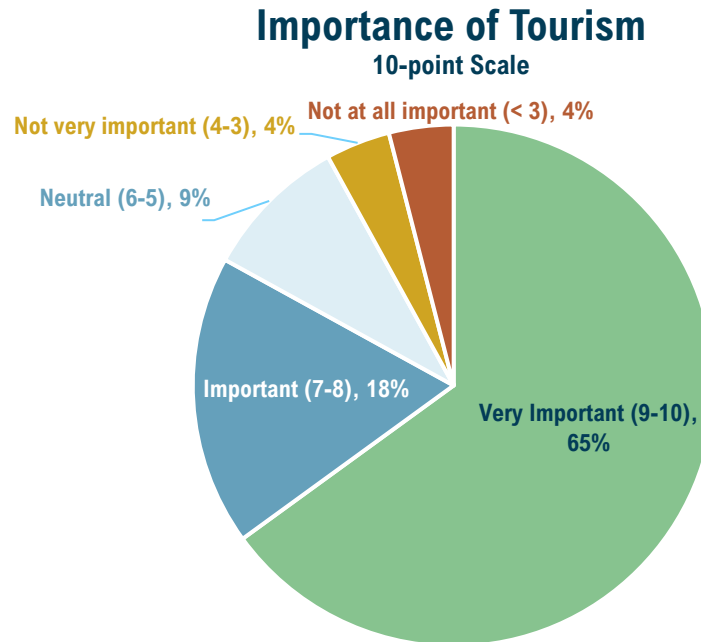
- Familiarity with HTA among stakeholders is broad – but not very deep. Only 28% indicate that they are “very familiar.” This is interesting since 40% indicate that they have had at least some interaction with HTA in the past year. This indicates that stakeholders are not clear about what HTA is and what it does.
- The overall rating for HTA is more negative than positive, with a mean rating of **4.7** on a **10-point scale** – and 43% of the respondents giving an unfavorable rating. Even among those with lots of interaction with HTA the rating only rises to 5.5 – just slightly above neutral.
- HTA has not established a positive image among stakeholders, and the neutral to negative perceptions are widespread.
- Many of the negative perceptions are linked to negative perceptions about tourism in Hawai'i and negative impacts on quality of place. But inefficiency and mismanagement is one of the key negative perceptions noted, along with an insufficient focus on local and small business needs, and perceived negative government involvement and over-regulation.
- Positive perceptions focus on economic development and tourism promotion, responsiveness to local and industry needs and the protection of natural and cultural resources.



Perception of Importance & Impact of Tourism

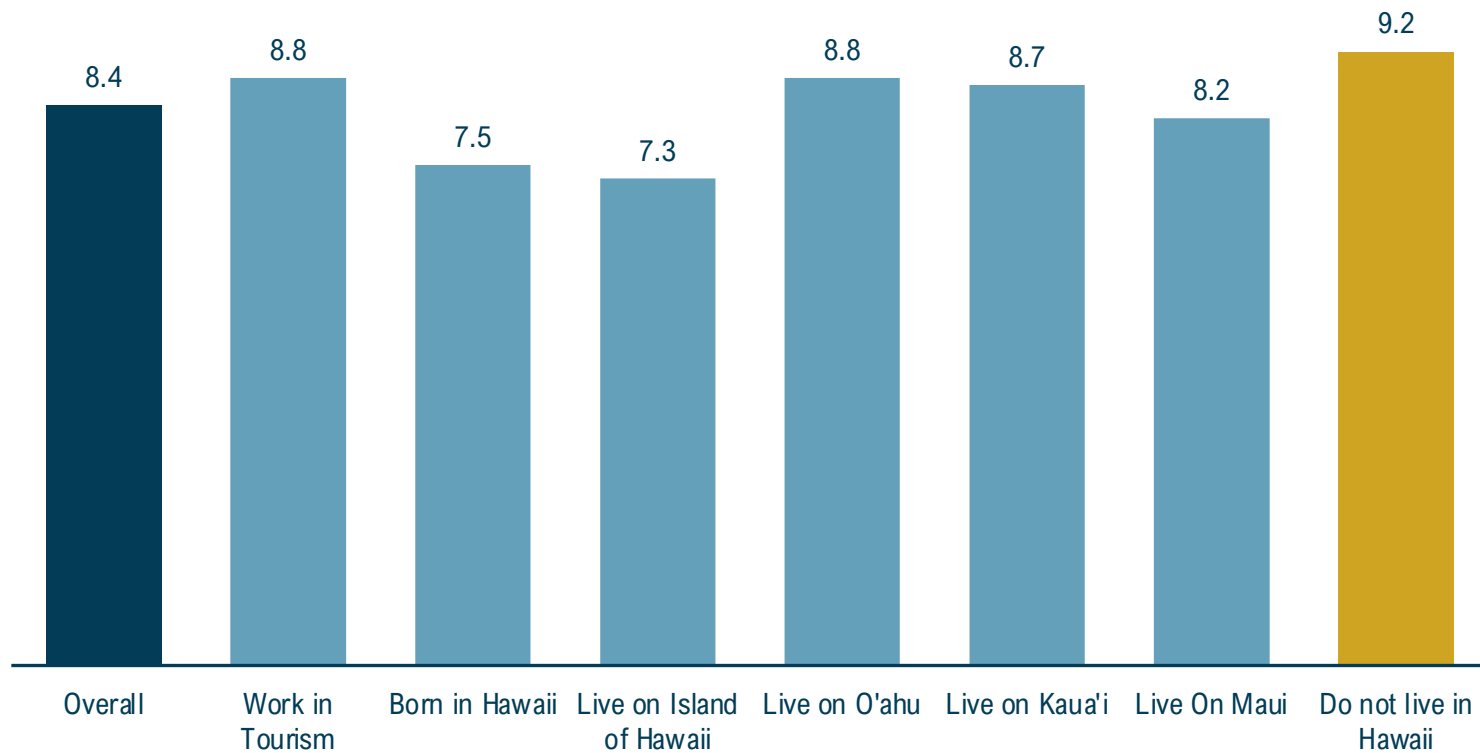
Importance of Tourism

Clearly stakeholders see the importance of tourism to Hawai'i with 65% indicating it is very important and only 8% indicating that it is not important.



Importance of Tourism

Importance of Tourism
10-point Scale



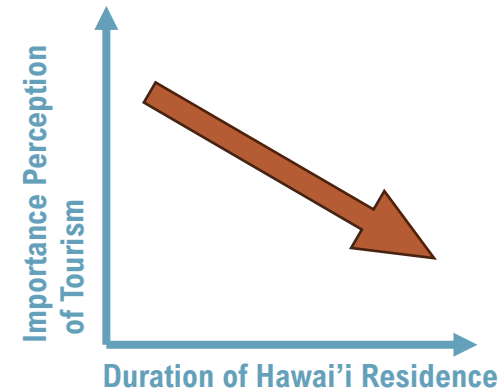
Importance of Tourism

In rating the importance of tourism in Hawai'i there were some noteworthy differences among groups of stakeholders:

- The perception of importance increases with household income.
- Importance decreases with length of time living in Hawai'i.
- Is not correlated with the level of education.
- Tourism's importance rates significantly higher for those with Caucasian ethnicity versus other ethnicities. (Caucasian 8.9 vs 7.2 for Hawaiian ethnicity)

These differences suggest that there are perceptions of inequality in terms of the positive impacts of tourism.

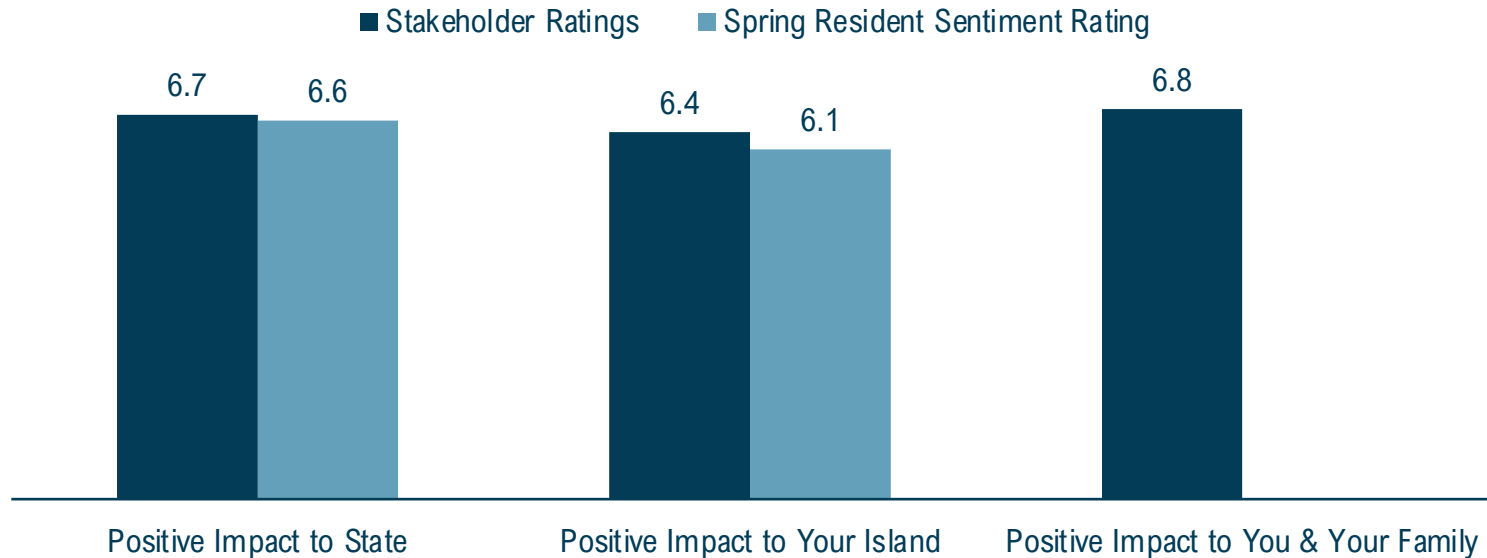
It is worth noting that those who have lived in Hawai'i longer are less convinced of the importance of tourism. This may suggest that they have seen less positive impact over time, and that they believe that the situation is worsening.



Overall View of Tourism

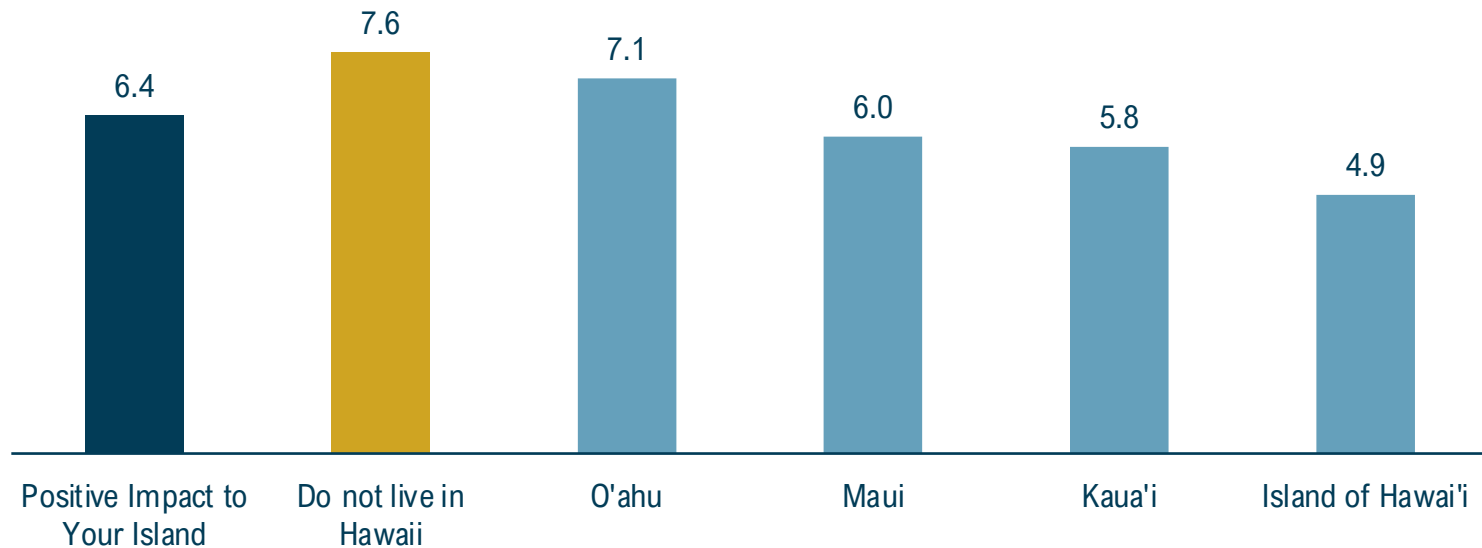
While stakeholders agree that tourism is important – they are less positive about its impact on the state. Still ratings among this audience(stakeholders) are more positive than results from ongoing HTA Resident sentiment survey

Comparison of Results by Stakeholders and Resident Sentiment



Perceptions Vary by Island

- This survey is for stakeholders, which includes both residents and non-residents.
- The 15% who do not live in Hawai'i are most positive about the impact to the state followed by residents on O'ahu.
- Those who live on the island of Hawai'i are the least positive.



Importance of Specific Activities

Stakeholders were also asked to evaluate the importance of various activities related to tourism.

Ratings of 4.0 or higher denote activities that stakeholders deem important. These focus on key themes:

- Creating jobs and leadership opportunities for local people
- Supporting the uniqueness of Hawaiian culture
- Supporting responsible/regenerative tourism practices
- Supporting local communities through development of their tourism economies and generating tax revenues
- Managing crisis response

Q. Consider each of the following activities. How important is each of these for a healthy tourism industry in the state of Hawai'i that benefits all stakeholders, including communities, tourism businesses, workers, and visitors?

5 point scale – Extremely important to not at all important	Mean
Create local jobs for local people	4.5
Perpetuating the uniqueness of Hawaiian culture and community	4.4
Educating visitors to reduce impacts	4.4
Promoting respectful tourism	4.4
Managing crisis response	4.3
Creating a strategic plan for Hawai'i tourism	4.2
Educating businesses and stakeholders about responsible tourism practices	4.2
Generate leadership opportunities for local people	4.2
Encouraging restorative & regenerative tourism practices	4.2
Generate tax revenues for local areas	4.1
Support for local communities/islands to develop their tourism economies	4.0
Creating understanding of Hawai'i as a place to visit	3.9
Providing training to tourism workers	3.9
Conducting research to measure results	3.9
Encouraging diversity and fairness in the tourism industry	3.7
Promoting Hawai'i as a place to do business	3.7
Providing technical and other assistance to tourism businesses	3.5
Attracting international visitors	3.4
Reducing barriers to travel to Hawai'i	3.3
Marketing Hawai'i to attract visitors	3.3
Managing the Hawai'i Convention Center	3.1

Importance of Specific Activities

- There is not strong support that marketing is an important activity to maintain a healthy tourism industry in the state.
- This was also supported in comments about HTA, and there is a segment of stakeholders who believe that visitors will continue to come to Hawai'i without marketing.
- This perception needs to be explored and addressed as industry experience shows that marketing is necessary to maintain a strong brand, to generate consideration and to attract the type of tourists who will be respectful and support the economy, while protecting natural and community resources.

Q. Consider each of the following activities. How important is each of these for a healthy tourism industry in the state of Hawai'i that benefits all stakeholders, including communities, tourism businesses, workers, and visitors?

5 point scale – Extremely important to not at all important	Mean
Create local jobs for local people	4.5
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Promoting respectful tourism	4.4
Managing crisis response	4.3
Creating a strategic plan for Hawai'i tourism	4.2
Educating businesses and stakeholders about responsible tourism practices	4.2
Generate leadership opportunities for local people	4.2
Encouraging restorative & regenerative tourism practices	4.2
Generate tax revenues for local areas	4.1
Support for local communities/islands to develop their tourism economies	4.0
Creating understanding of Hawai'i as a place to visit	3.9
Providing training to tourism workers	3.9
Conducting research to measure results	3.9
Encouraging diversity and fairness in the tourism industry	3.7
Promoting Hawai'i as a place to do business	3.7
Providing technical and other assistance to tourism businesses	3.5
Attracting international visitors	3.4
Reducing barriers to travel to Hawai'i	3.3
Marketing Hawai'i to attract visitors	3.3
Managing the Hawai'i Convention Center	3.1

Summary

- There is a strong understanding of the importance of tourism to Hawai'i. But there are noteworthy differences - those born in Hawai'i are significantly less sold on the importance of this industry. And the perception that tourism is important to Hawai'i decreases with income and with the length of time people have lived in the state. Stakeholders with higher income, and those who do not live in Hawai'i are significantly more positive. This points to issues of equality and suggests that people have become less positive over time and perceive that the situation is worse now than in the past.
- While people understand the importance of tourism to the state, far fewer believe that tourism provides a positive impact to the state. This indicates that many want to see changes in the way that tourism is managed to increase the positive impact and decrease the negative.
- Stakeholders want the efforts to support tourism to focus on jobs for locals, supporting Hawaiian culture and resources, supporting local community economies and taxes and crisis management.
- There is much less interest in marketing and a widespread belief that Hawai'i doesn't need to market itself to tourists. This suggests a need for better communication about the importance of marketing, and how HTA has focused on attracting visitors who are respectful and can provide the economic benefits without the level of negative impact.

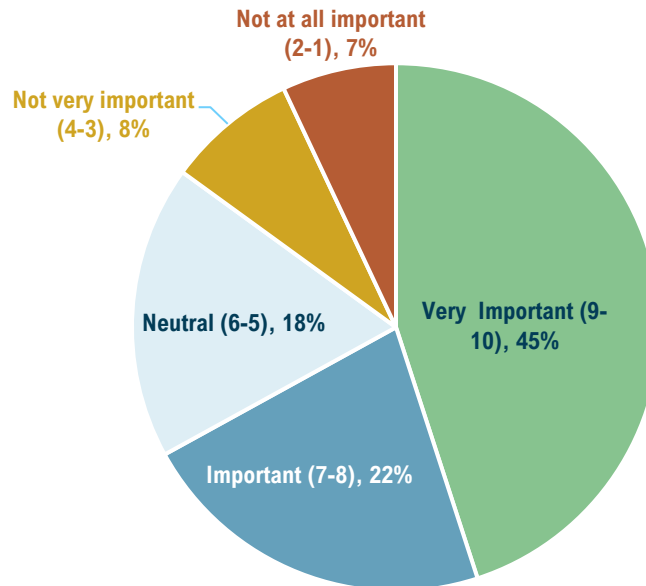


Importance & Focus of Oversight

Importance of State Oversight

- The majority of stakeholders (67%) agree that it is important to have state government provide oversight for tourism – but only 45% strongly agree.
- The more lukewarm support for state oversight is related to perceptions of HTA and those who are favorable toward HTA are much more likely to believe that there needs to be state oversight.

Importance of State Oversight



Qualities of the Organization

In terms of what stakeholders want from an oversight organization there is focus on being trustworthy, independent of politics, and protective of Hawaiian resources and culture.

Of course, stakeholders also want an organization that is effective, efficient, professional and responsive – with a long-term focus.

Important Qualities for Oversight Organization (5-point Scale)	Mean
Trustworthy	4.8
Independent of politics	4.6
Protective of Hawai'i natural resources	4.6
Focused on the long-term	4.6
Effective	4.5
Efficient	4.5
Protective of Hawaiian culture	4.4
Professional	4.4
Responsive	4.4
Community-oriented	4.4
Able to deliver economic benefits from tourism	4.4
Culturally sensitive	4.3
Innovative	4.1
Collaborative with tourism businesses	4.1
Expert	4.1
Tourism worker-oriented	4.0
Visitor-experience oriented	4.0
Research-driven	4.0
Collaborative with county government	3.9
Internationally focused	3.3
Aligned with Hawai'i legislative priorities	3.1

Importance of State Oversight

In addition to evaluating the importance of various activities to support a healthy tourism economy, stakeholders were also asked to indicate where state oversight was most important. Everything was rated 4.0 or higher indicating that there was strong support for state oversight across all of these activities.

Key areas with strongest support included:

- Crisis management
- Activities to support respectful, restorative/regenerative tourism that supports the local culture
- Economic development

While there is less support for marketing overall, there is a fairly strong feeling that there should be state oversight of marketing efforts.

How important is it for the State to have oversight of these tourism functions?

Important to Have State Oversight (5-point Scale)	Mean
Managing crisis response	4.6
Encouraging restorative & regenerative tourism practices	4.4
Promoting respectful tourism	4.4
Educating visitors to reduce impacts	4.4
Create local jobs for local people	4.4
Generate tax revenues for local areas	4.4
Encouraging diversity and fairness in the tourism industry	4.4
Perpetuating the uniqueness of Hawaiian culture and community	4.4
Support for local communities/islands to develop their tourism economies	4.3
Reducing barriers to travel to Hawai'i	4.3
Generate leadership opportunities for local people	4.3
Educating businesses and stakeholders about responsible tourism practices	4.3
Creating a strategic plan for Hawai'i tourism	4.3
Conducting research to measure results	4.3
Marketing Hawai'i to attract visitors	4.2
Promoting Hawai'i as a place to do business	4.2
Providing technical and other assistance to tourism businesses	4.2
Providing training to tourism workers	4.1
Attracting international visitors	4.1
Creating understanding of Hawai'i as a place to visit	4.1
Managing the Hawai'i Convention Center	4.0

Summary

The majority of stakeholders believe that state oversight for tourism is important. When focusing efforts for a state organization the following are the key areas stakeholders deem important for a healthy economy and state oversight. This highlights key priorities for stakeholders.

Above average for importance and in having state oversight:

1. Create local jobs for local people
2. Perpetuating the uniqueness of Hawaiian culture and community
3. Educating visitors to reduce impacts
4. Promoting respectful tourism
5. Managing crisis response
6. Creating a strategic plan for Hawai'i tourism
7. Educating businesses and stakeholders about responsible tourism practices
8. Generate leadership opportunities for local people
9. Encouraging restorative & regenerative tourism practices
10. Generate tax revenues for local areas
11. Support for local communities/islands to develop their tourism economies



Structuring the Oversight Organization

Oversight Organization Structure

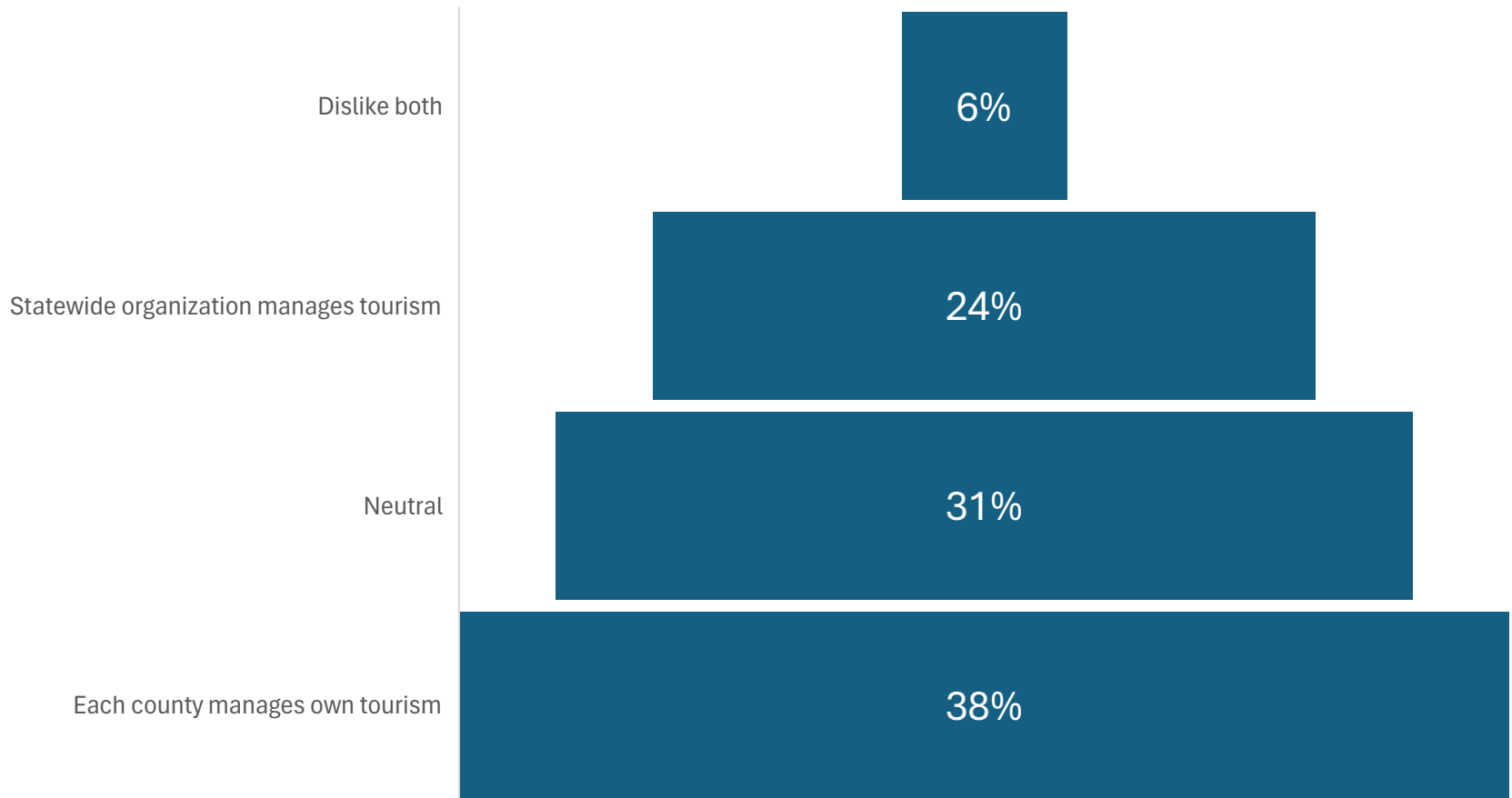
- As part of the stakeholder survey process a series of tradeoffs were presented and stakeholders were asked to indicate a preference between the two options, or indicating that they had no preference. Those who expressed an equal preference for both options were then asked whether they:
 1. Liked both options equally
 2. Disliked both options
 3. Did not have a strong opinion.
- This exercise was meant to provide guidance as to priorities and preferences in structuring the oversight organization. While the options were presented as a trade-off, in many cases it is more a matter of balance, and finding a way to achieve both options, with more focus where stakeholders see the priority.
- The process highlighted the challenges faced as in most cases there was significant choice for both options.

State vs County

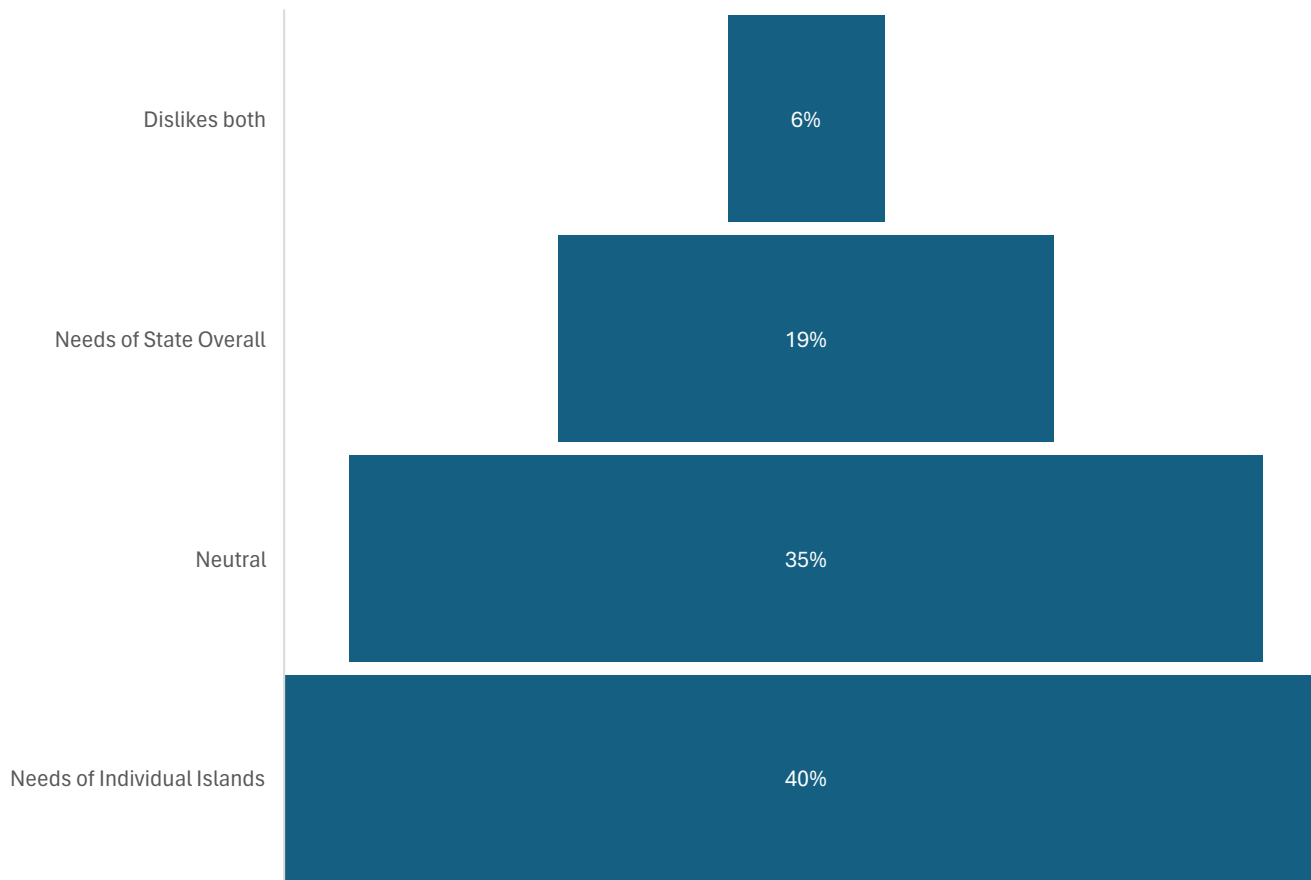
- There were several questions regarding whether the focus should be statewide versus a focus at the county level.
- In every case the preference skewed toward county/island focus versus a statewide focus.
 - The strongest skew was a preference for focusing on the needs of individual islands/communities (40%) versus needs of state overall (19%)
 - For management of tourism and strategic planning the preference was at the county level (38%) versus state level (24%)
 - And for promoting the brand and crisis management, the largest group for each of these was neutral. More chose county level versus statewide.
- The following slides shows the distribution for each of these questions.

A statewide organization manages tourism	VS	Each county manages tourism on its islands.
State organization creates strategic plan for Hawai'i tourism		Each county develops its own tourism strategic plan
State organization promotes the Hawai'i brand.		Each county promotes its own brand.
State tourism organization leads response to a tourism crisis		Each county manages crisis response for tourism
State organization focuses on needs of state overall		State organization focuses on needs of individual islands/communities

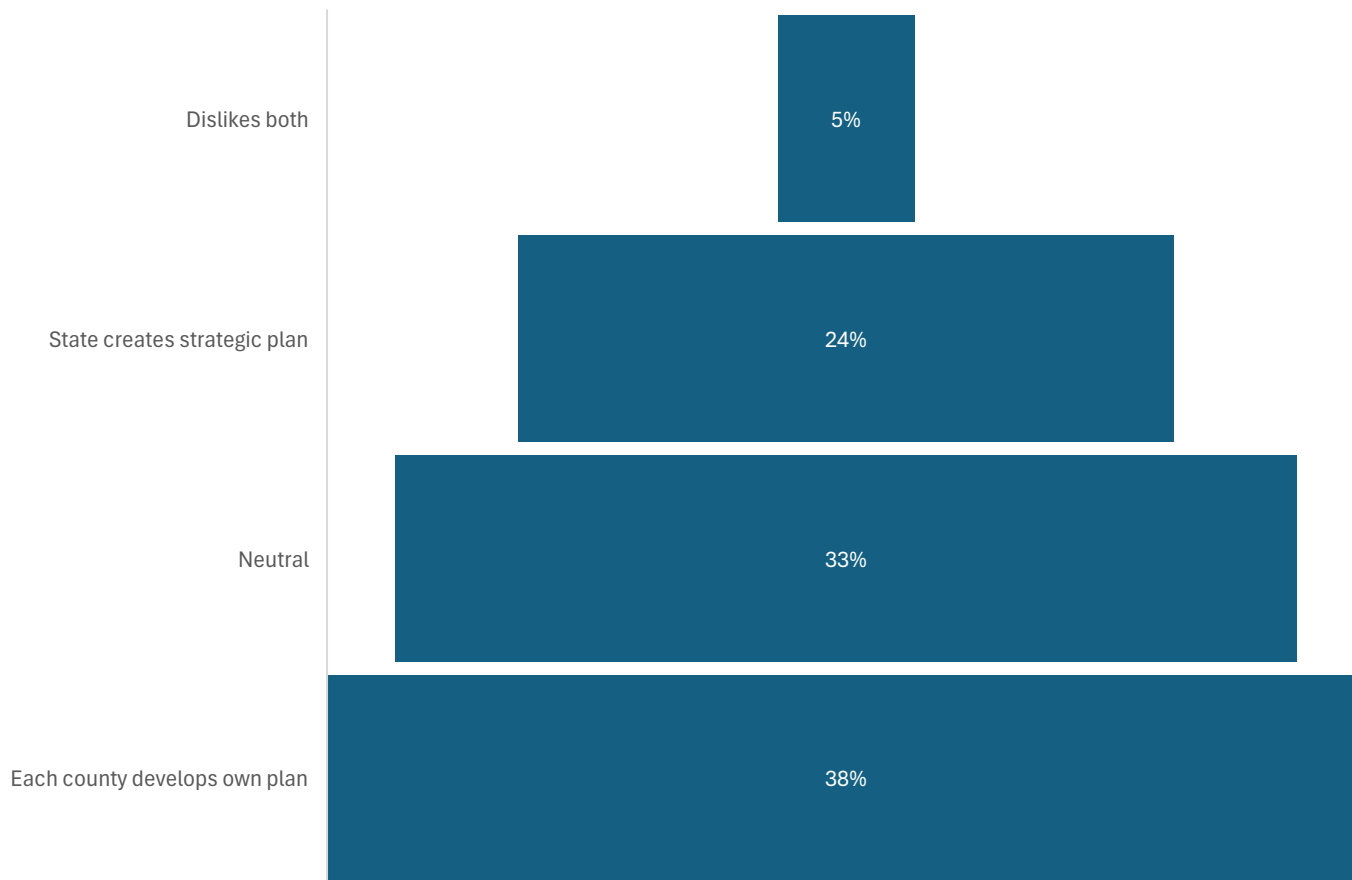
State vs County Management



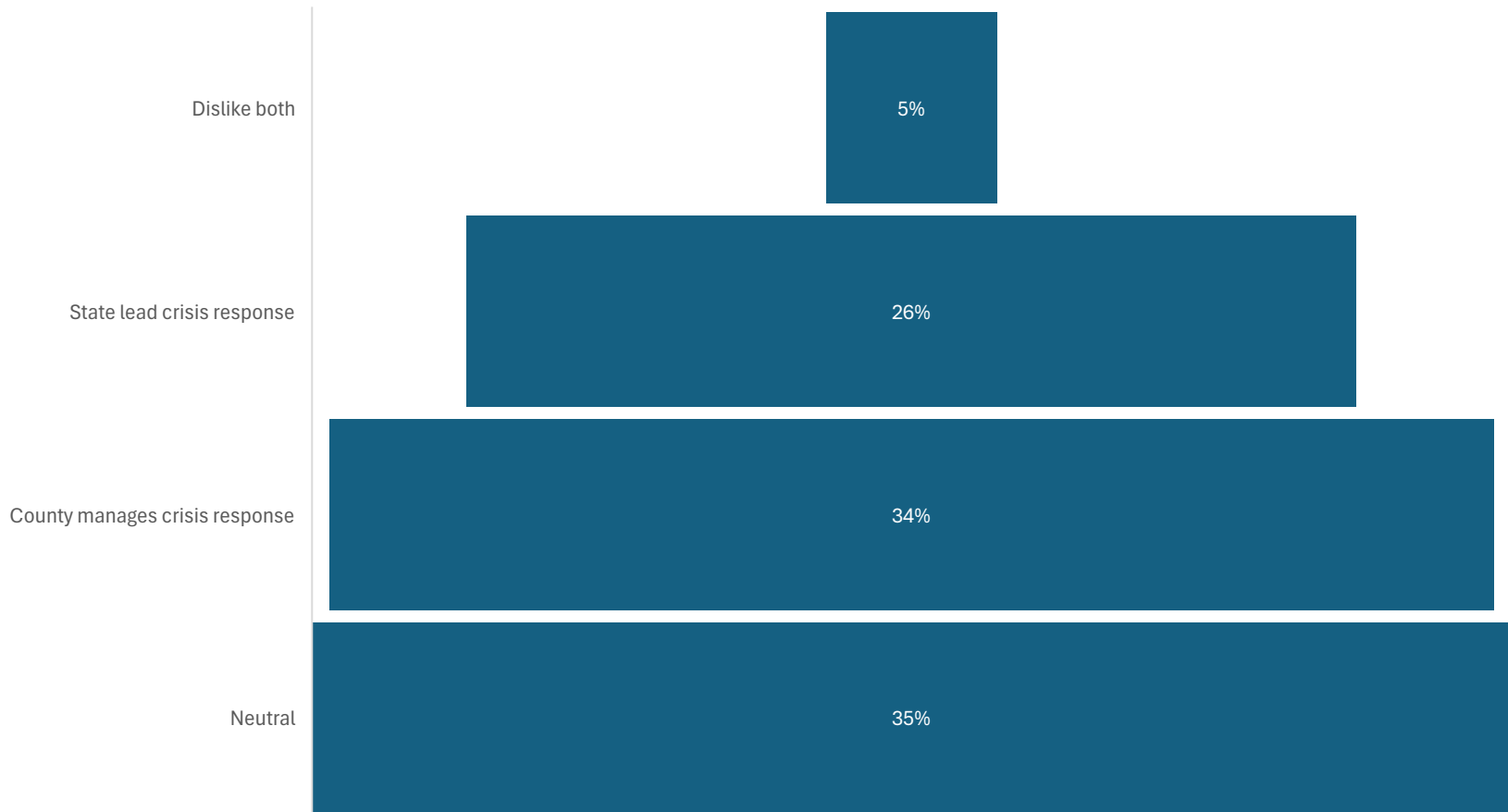
State-Centric vs Island-Centric Focus



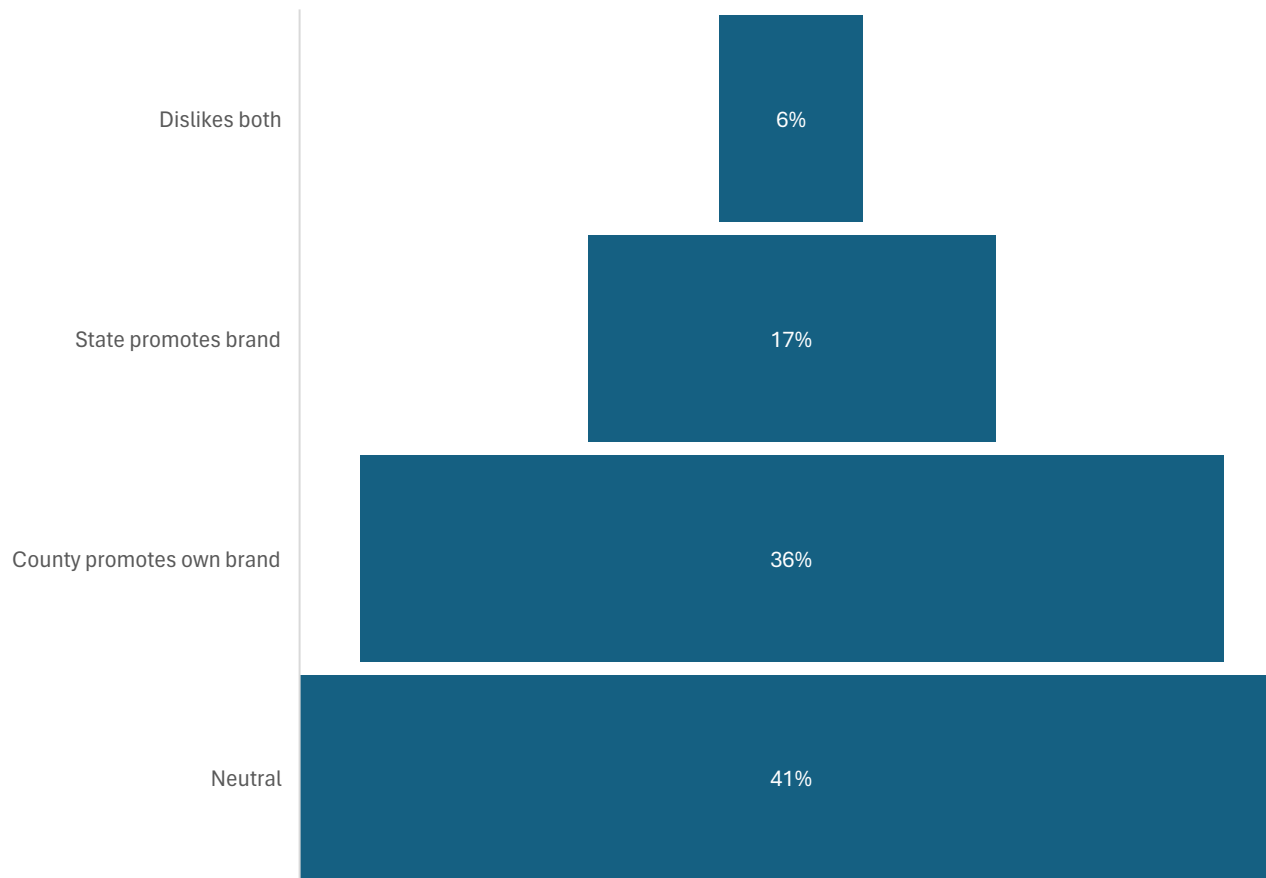
State vs County Level Planning



State vs County Crisis Response



State vs County Brand Management

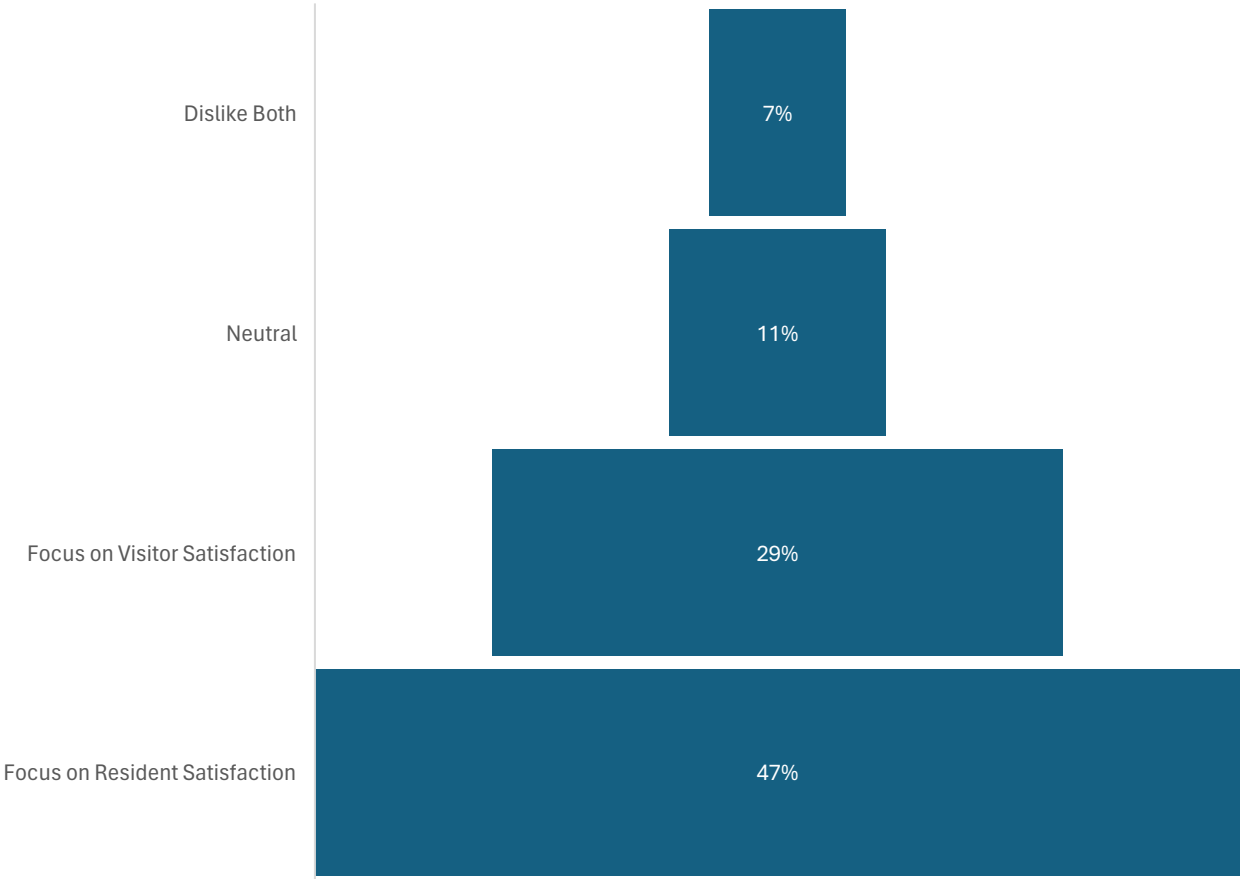


Organizational Focus

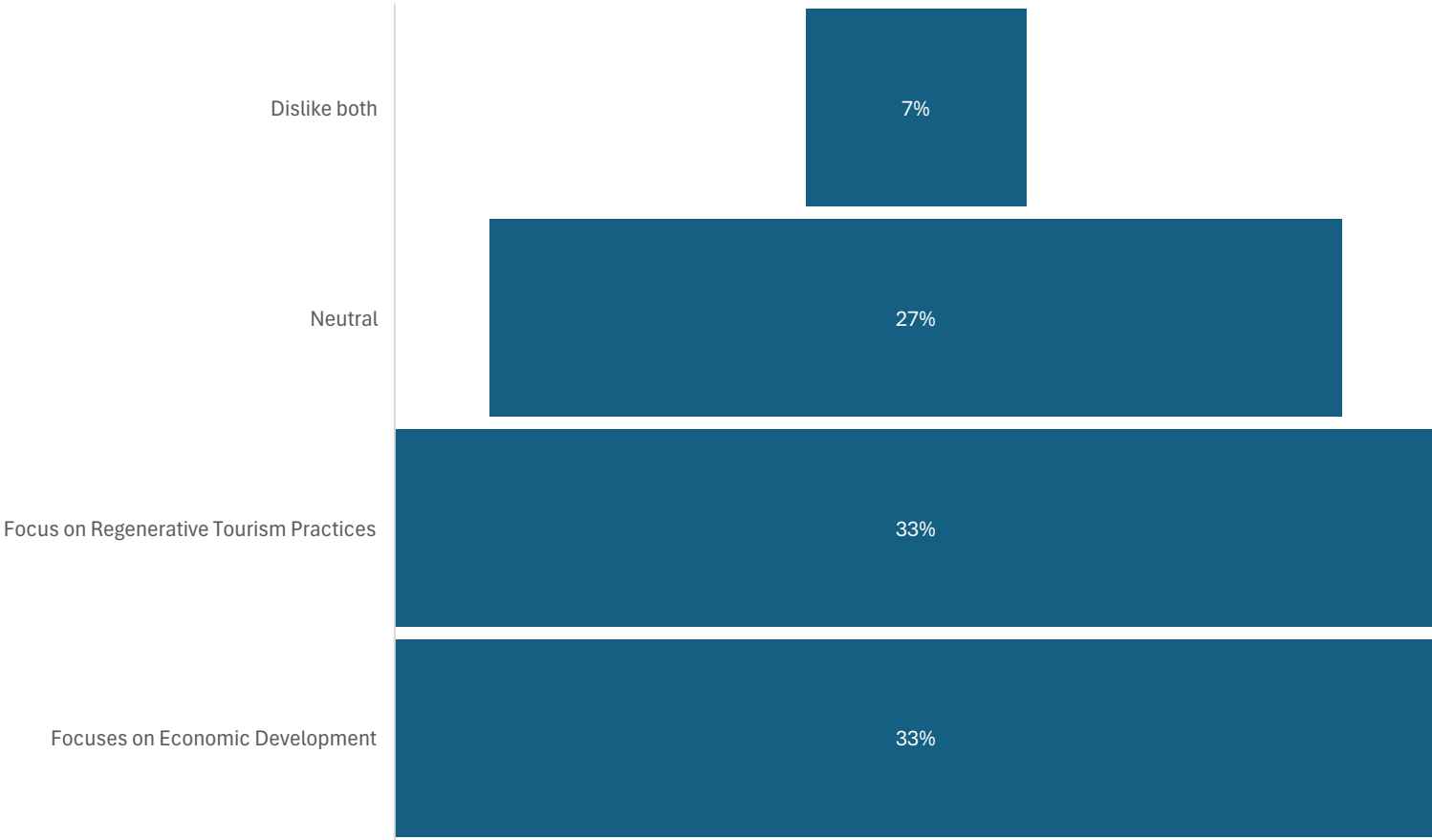
- There were several questions regarding the organizational focus and priorities for the organization
- There is a strong preference for focusing on resident satisfaction (47%) versus visitor satisfaction (29%)
- There is a desire for the organization to balance focusing on regenerative tourism practices (33%) as well as economic development on the islands (33%).
- The largest group (38%) were neutral on whether the state tourism agency should be focused on stewardship versus other state agencies having this focus. And the preference between the two was almost equal.
- The largest group (41%) were also neutral about whether the state tourism organization should manage convention and business travel, with 33% believing it should be individual businesses.
- The following slide shows the distribution across these questions.

State tourism organization is focused on stewardship		Stewardship is the focus of other state agencies
State tourism organization manages convention and business travel		Individual businesses manage convention and business travel
State organization focuses on visitor satisfaction		State organization focuses on resident satisfaction
State organization focuses on regenerative tourism practices		State organization focuses on tourism economic development on the islands

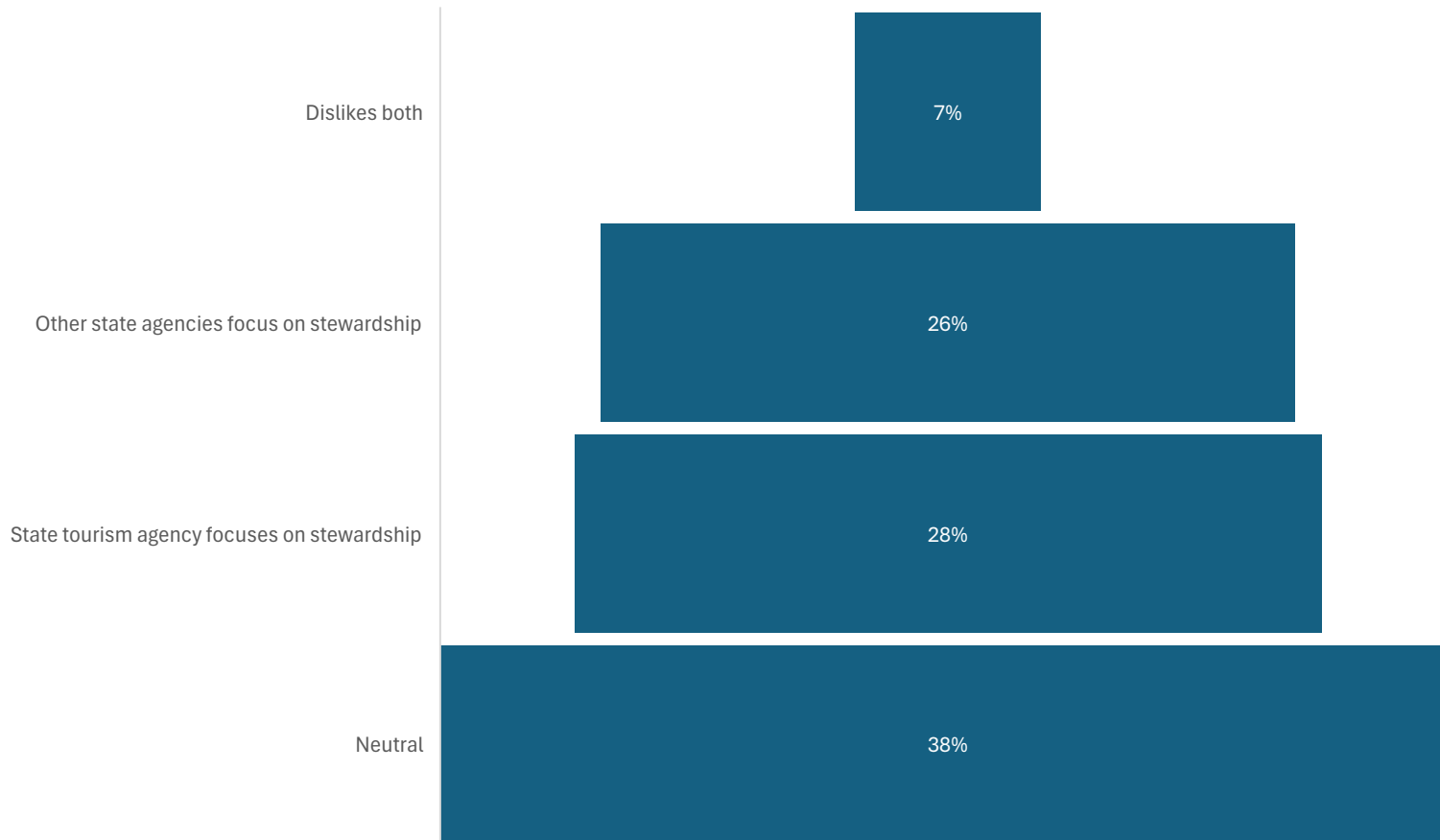
Resident vs Visitor Satisfaction



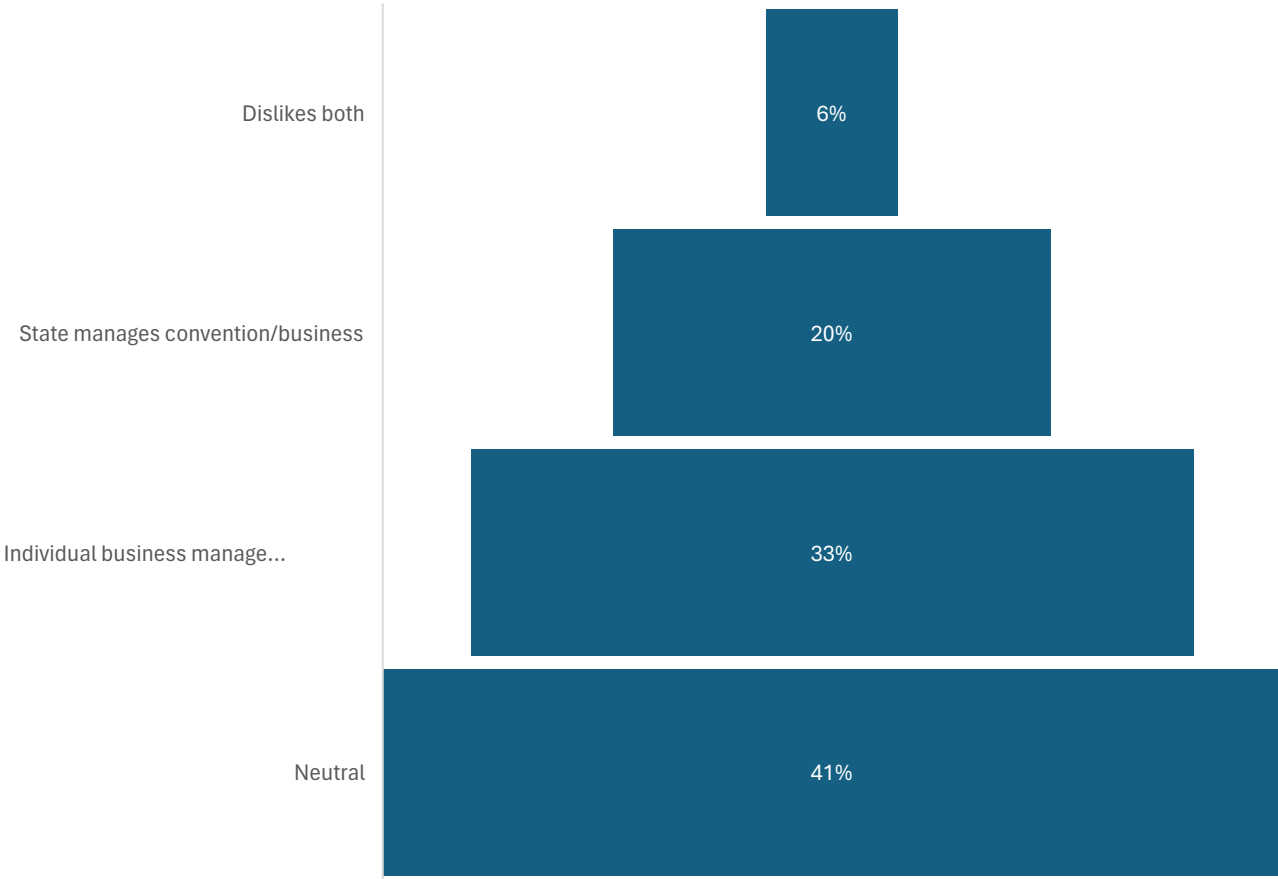
Regenerative vs Economic Development



Tourism Focus on Stewardship



State involvement in convention and business travel

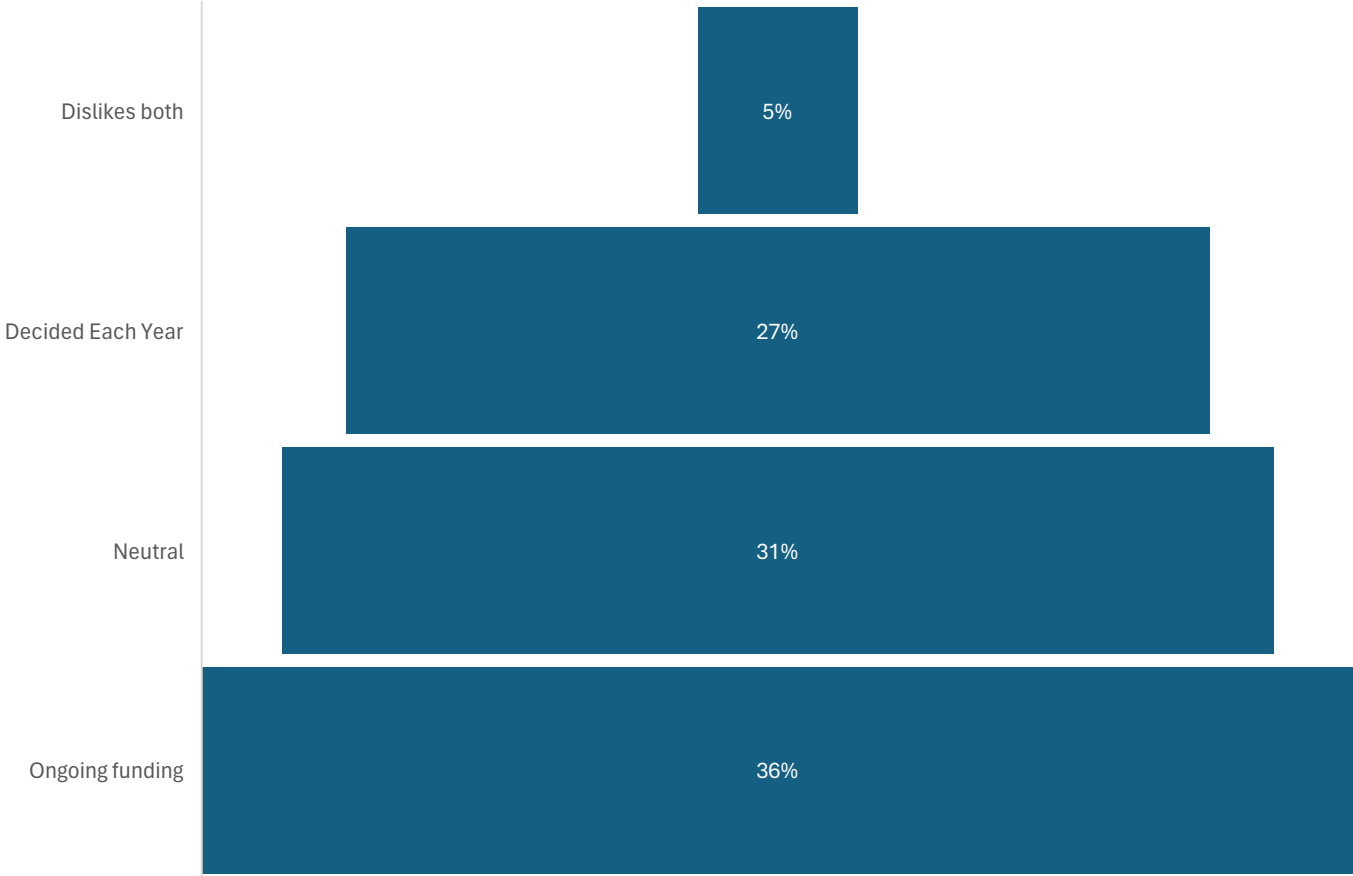


Organizational Structure

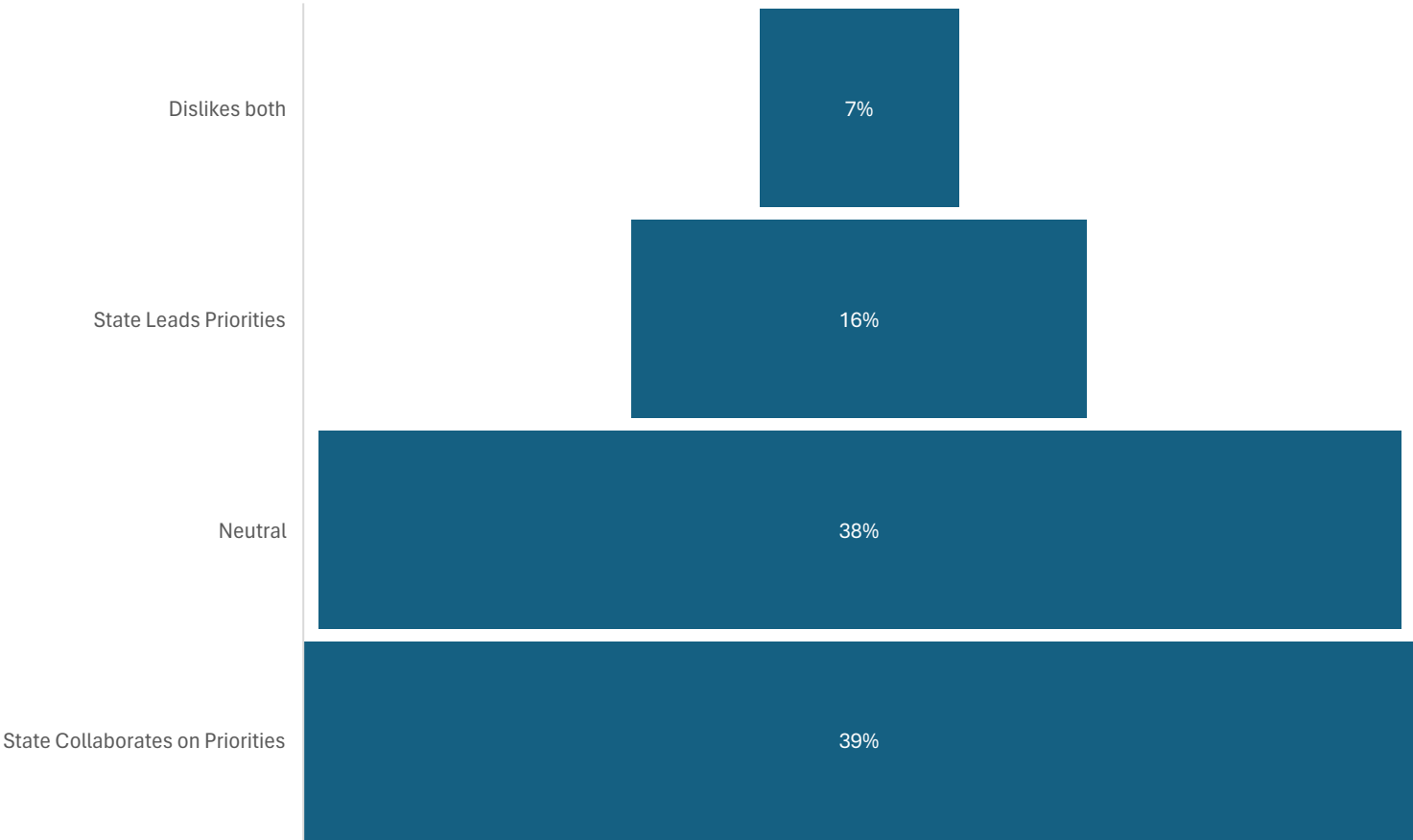
- There were several questions regarding the organizational structure and role in tourism in Hawai'i.
- The largest group (36%) feel that there should be a stable source of funding, with 31% neutral and 27% indicating it should be decided each year.
- There is a strong focus on a collaborative state agency (39%) with only 16% wanting a state organization that leads tourism priorities.
- The largest group (39%) were neutral on the choice between a non-profit (35%) and a state agency (18%)
- The following slide shows the distribution across these questions.

State tourism has a reliable, ongoing source of funding		State legislature decides the tourism budget each year
State organization leads tourism priorities		State organization collaborates on tourism priorities
State tourism organization is a government agency		State tourism organization is a nonprofit

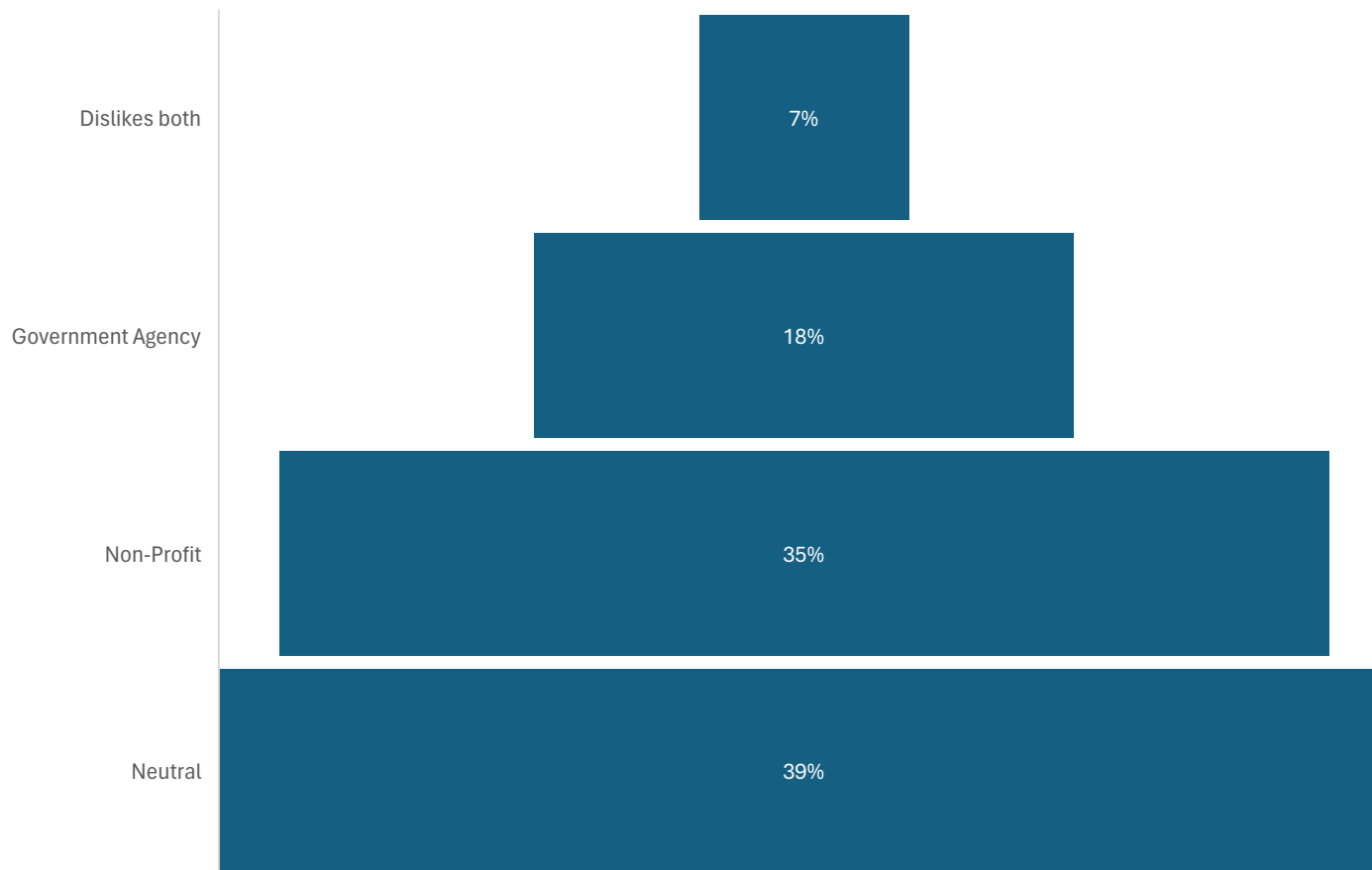
Funding



Leads vs Collaborates



Government Agency Vs Non-Profit



Summary

- In considering the restructured tourism oversight organization stakeholders want:
- A strong focus at the county/island level versus a statewide focus. This is true for management, planning, needs assessment and brand. There is less clarity in terms of crisis management, where there is more support for statewide leadership.
- An organization that focuses more on resident satisfaction than visitor satisfaction.
- An organization that balances a focus on economic development with a focus on regenerative tourism.
- Stewardship efforts that are a focus of the state tourism organization – but are also a focus of other state agencies.
- Stakeholders are not sure of the right structure for this organization, but there is more support for a non-profit than a state agency.
- Regardless of the structure they want an organization that is collaborative and that has secure funding.

Participants

Sample in this Summary:
 Total Completed Surveys: 619
 Total with Partial: 690

39% indicate that they or an immediate family member work in the tourism industry

Where do You Live?	%
O'ahu	30%
Maui	27%
Do not live in Hawai'i	15%
Island of Hawai'i	18%
Kaua'i	9%
Moloka'i/Lanai	1%

Education	%
High school or less	4%
Business/Trade school or some college	18%
College graduate	45%
Post graduate degree	33%
Prefer not to answer	2%

Gender	%
Male	42%
Female	51%
Other	0%
Prefer Not to Answer	7%

How many Yrs lived in Hawai'i	%
Less than 10 years	18%
10-19 years	15%
20 years or more	30%
Born in Hawai'i	21%
Prefer not to answer	16%

What is your occupation?	%
Professional	27%
Retired/Unemployed	23%
Management	15%
Other, please specify	11%
Service (hotel/restaurant)	4%
Sales	4%
Government	4%
Administration/Clerical	2%
Prefer not to answer	10%

Ethnicity	%
White/Caucasian	65%
Hawaiian	13%
Mixed Ethnicity	12%
Asian	10%
Other, specify	6%
Japanese	4%
Filipino	3%
Hispanic/Latin	3%
American	3%
Black	0%
Middle Eastern	0%

Age	%
26-35	6%
36-45	10%
46-55	18%
56-65	31%
66-84	35%

Average Age- 59 yrs old