



Tourism Study

Prepared for:
Chamber of Commerce of Hawaii
March 2009

Background & Methodology

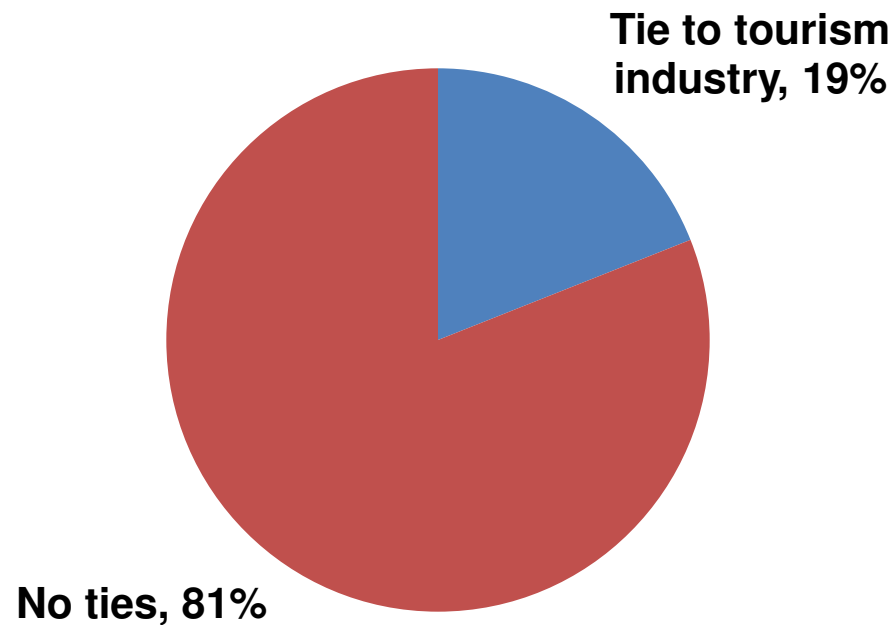
- Field dates: March 10 to March 15, 2009
- 502 telephone interviews conducted with Hawaii residents statewide. The sample was broken down based by population estimates with the following number of surveys in each area (353=Oahu/ 66=Big Island/50=Maui/ 33=Kauai).
- Statistical weighting was used to enable the reader to see state-wide totals in the proper proportions to population.
- The initial sample was randomly generated using QMark Research & Pollings' proprietary Random Digit Dialing Software.
- The data was input and compiled using SPSS.
- The margin of error for a sample of this size (n=502) is +/- 4.38 percentage-points with a 95% confidence level.

Objectives

- To measure the percentage of residents that have ties to the Hawaii tourism industry.
- To gain insight into how residents' lives have been affected by the current economic downturn.
- To gauge residents' level of support for State initiatives to aid the tourism industry/Hawaii economy.

Summary Of Findings

Ties to Tourism Industry



Neighbor Island respondents (28%) are more likely to be attached to the tourism industry than are their Oahu counterparts (15%).

Effect of Economic Downturn on Personal Situation

	OVERALL
Family not affected	66%
Less income/ sales/ work hours	11%
Spending less in general	7%
Worried about job/ loss of benefits	7%
Have lost job	5%
Affected own personal spending habits	3%

Effect of Economic Downturn on Workplace

	OVERALL
Workplace not affected	38%
Not employed/ Retired/Homemaker/ Student	23%
Fewer customers in general	10%
Fewer tourist customers	8%
Layoff of employees	7%
Salary reductions	5%

Position Statements

	MEAN	Strongly Agree	Some-what Agree	NET AGREE	Some-what Disagree	Strongly Disagree	NET DIS-AGREE	DON'T KNOW/ REF
The State should do everything it can to develop alternate industries so Hawaii is not so tourism dependent	3.7	76%	18%	94%	3%	1%	4%	2%
Our State should focus on projects to stimulate Hawaii's economy that can be implemented immediately regardless of whether they are tourism related or not	3.6	66%	28%	94%	2%	1%	3%	2%
The State should do everything it can to bring tourists to Hawaii in this down time	3.4	57%	28%	85%	7%	5%	12%	3%
Because competitive destinations are increasing their spending, our State should spend more on marketing Hawaii in order to bring tourists here	3.1	39%	37%	76%	13%	7%	20%	5%

Profile of Respondents

	OVERALL
INTERNET ACCESS	82%
YEARS IN HAWAII	
Less than 10 years	10%
10 but less than 20	11%
20 years or more	32%
Lifetime	46%
EDUCATION	
H.S./GED	23%
Trade/ Community College/ Military	8%
Some College	23%
College graduate	24%
Post graduate studies	21%
PRIMARY RESIDENCE	
Own	72%
Rent	25%
EDUCATION	
H.S./ GED	23%
Some College/Trade/JC	30%
College Degree	46%

	OVERALL
AGE	
18-34	16%
35-54	32%
55+	46%
MEAN	52.8
ETHNICITY	
Caucasian	34%
Japanese	19%
Hawaiian/ Part	18%
Filipino	10%
HOUSEHOLD INCOME	
Less than \$25K	7%
\$25K-\$50K	13%
\$50K-\$75K	22%
\$75K-\$100K	14%
\$100K+	23%
GENDER	
Male	56%
Female	44%

QMark Research