



Resident Sentiment Survey Spring 2023 Highlights



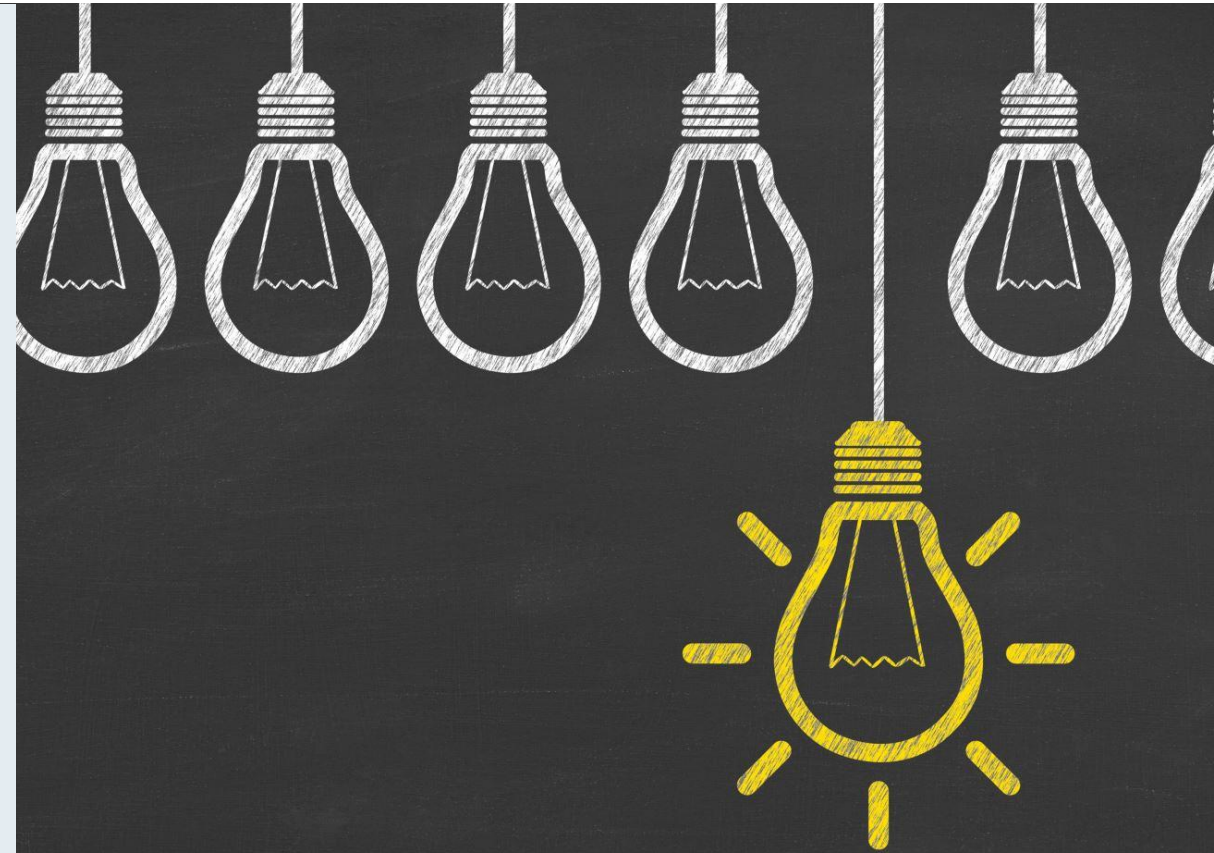
Prepared for the:
State of Hawai'i
Department of Business, Economic Development & Tourism
July 2023
Fielded: May 5 through June 22, 2023



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What's the Big Idea?

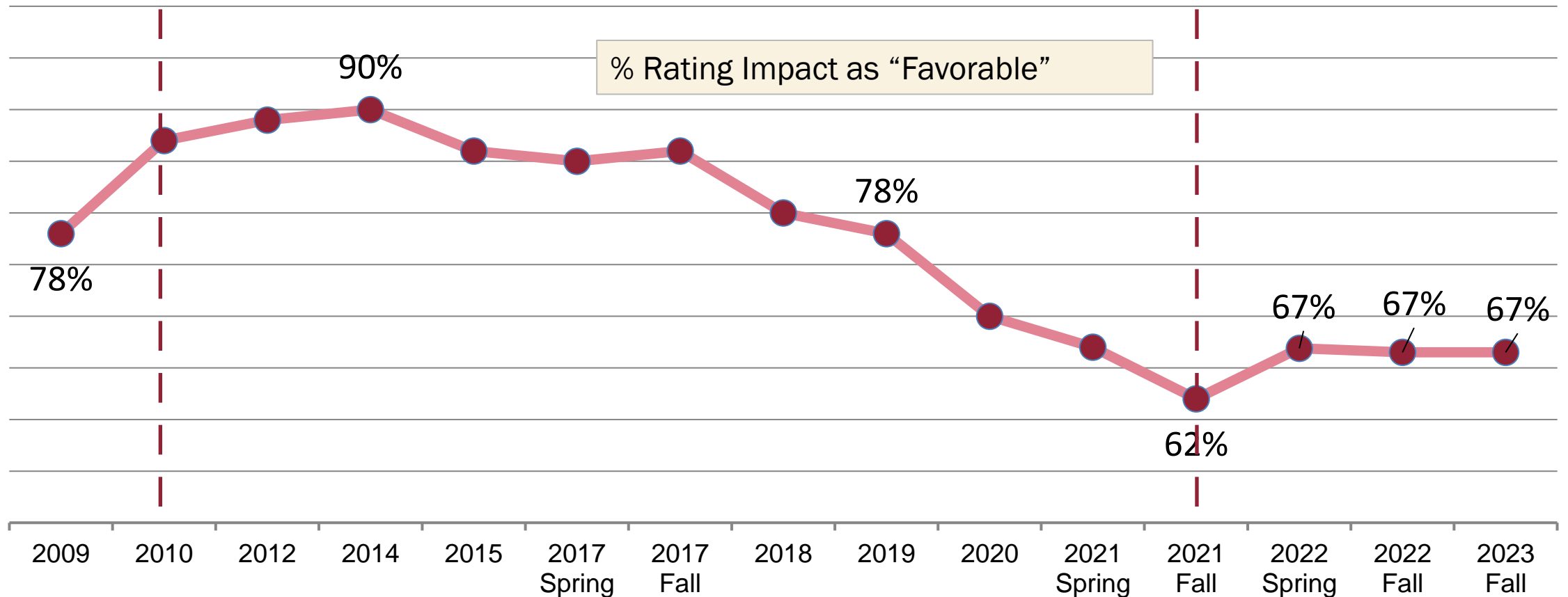
- 1 Measures of Hawai'i Resident Sentiment have stabilized, though below historic levels.
- 2 Awareness of destination stewardship initiatives strengthen Resident Sentiment.
- 3 However, the perceived balance of tourism's benefits vs. challenges is shifting.
- 4 Perceived challenges of tourism extend beyond HTA's direct areas of authority.





Measures of Hawai'i Resident Sentiment have stabilized

Favorable Views of Hawai'i Tourism holding steady

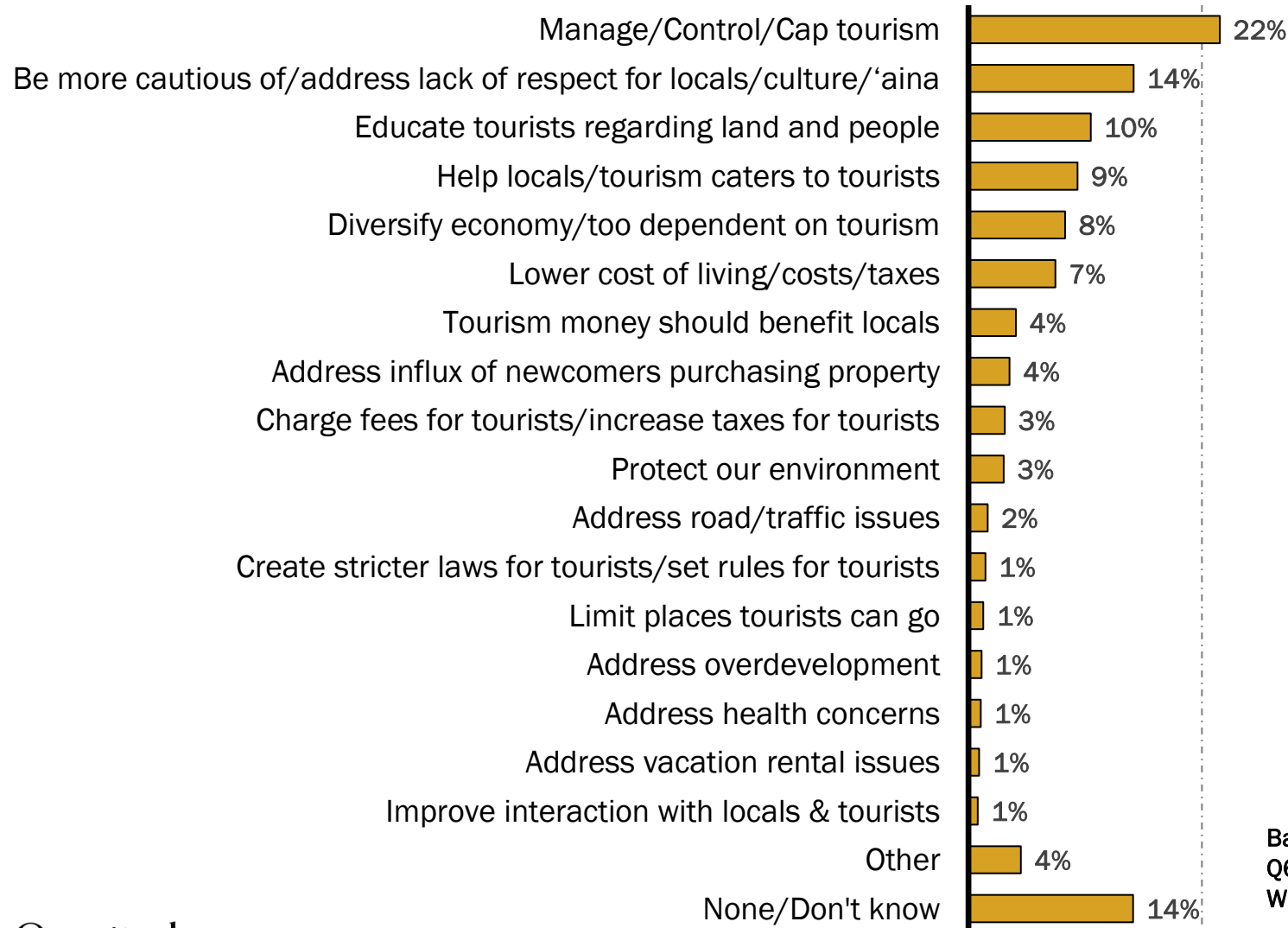


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

Note: % with Favorable opinion of tourism defined as Rating of 6 to 10 on 10-point scale.

Opportunities for Improving Opinion of Tourism (Spring 2023)

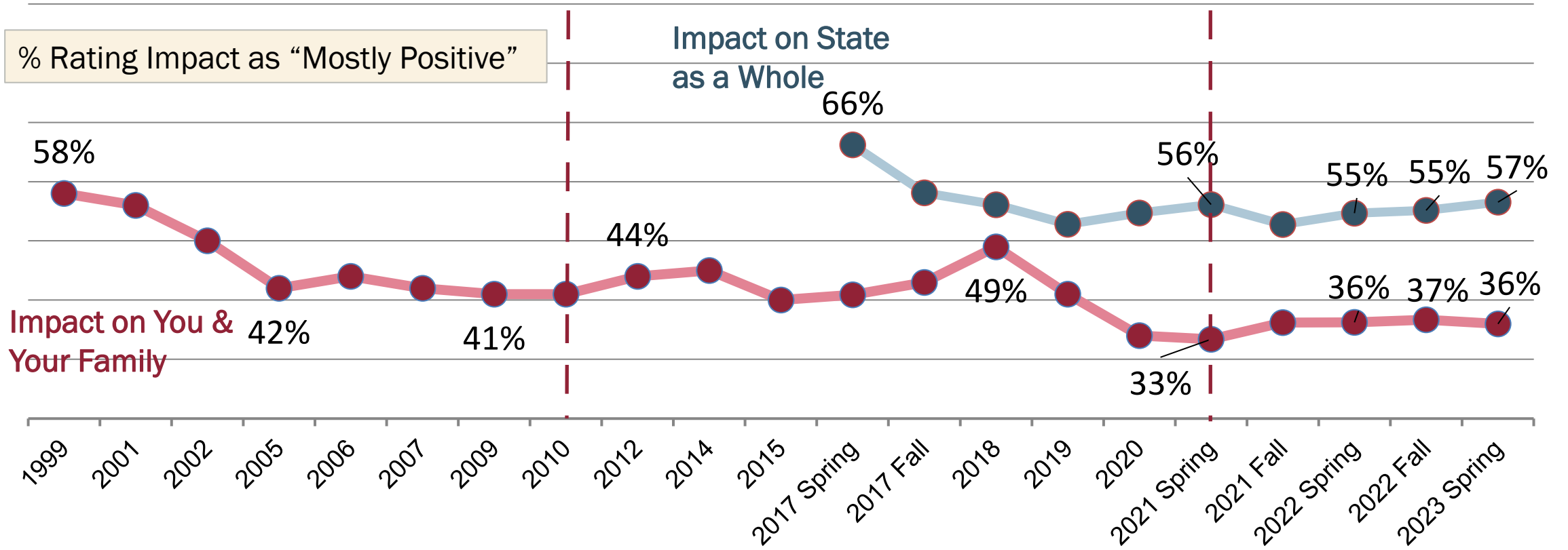
(According to residents **not** favorable toward tourism in Hawai'i)



Base: Spring 2023 (623)

Q6a. You said that you do not have a favorable opinion of tourism. What would it take to improve your opinion? Anything else?

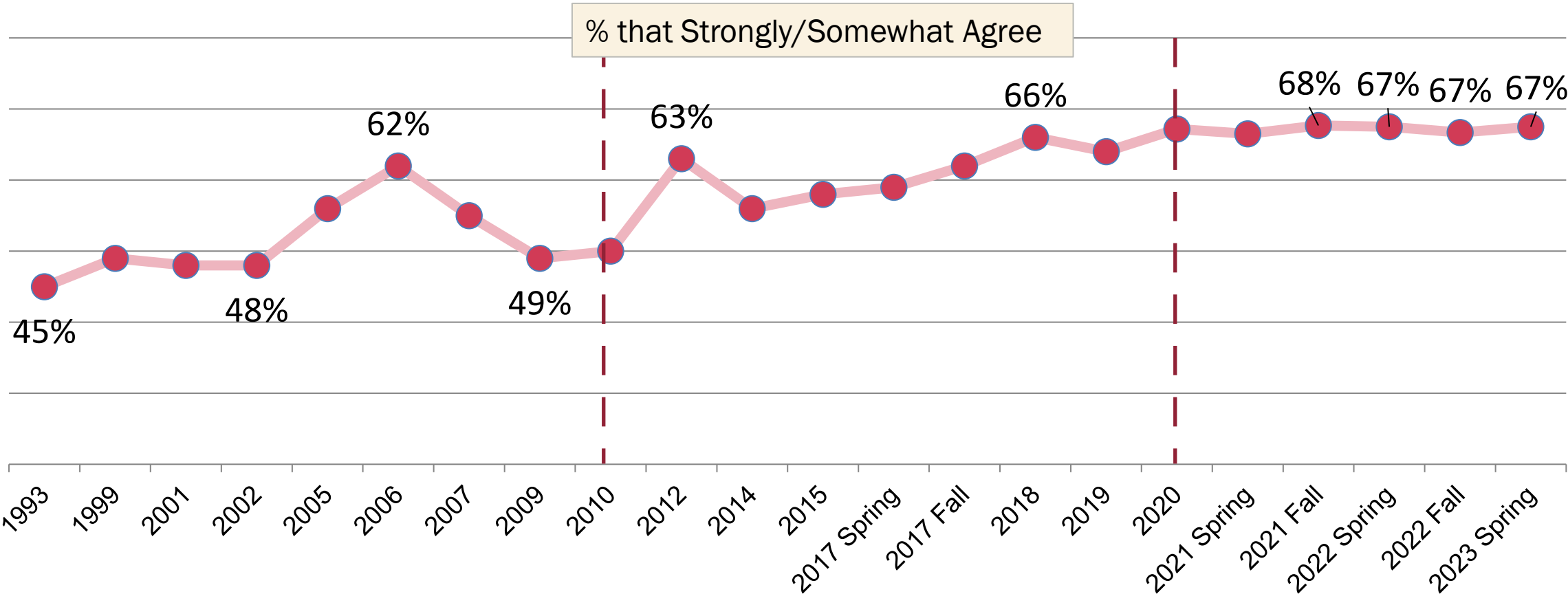
Mostly Positive “Impact of Tourism” holding steady



Q2b. 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?

Note: % saying Tourism has been “mostly positive” for you and your family defined as Rating of 7 to 10 on 10-point scale.

“This Island is being run for tourists at the expense of local people” steady



Q4. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?
Note: % that Strongly/Somewhat Agree defined as Rating of 6 to 10 on 10-point scale.



Destination stewardship initiatives strengthen Resident Sentiment

Awareness of HTA Destination Stewardship Initiatives

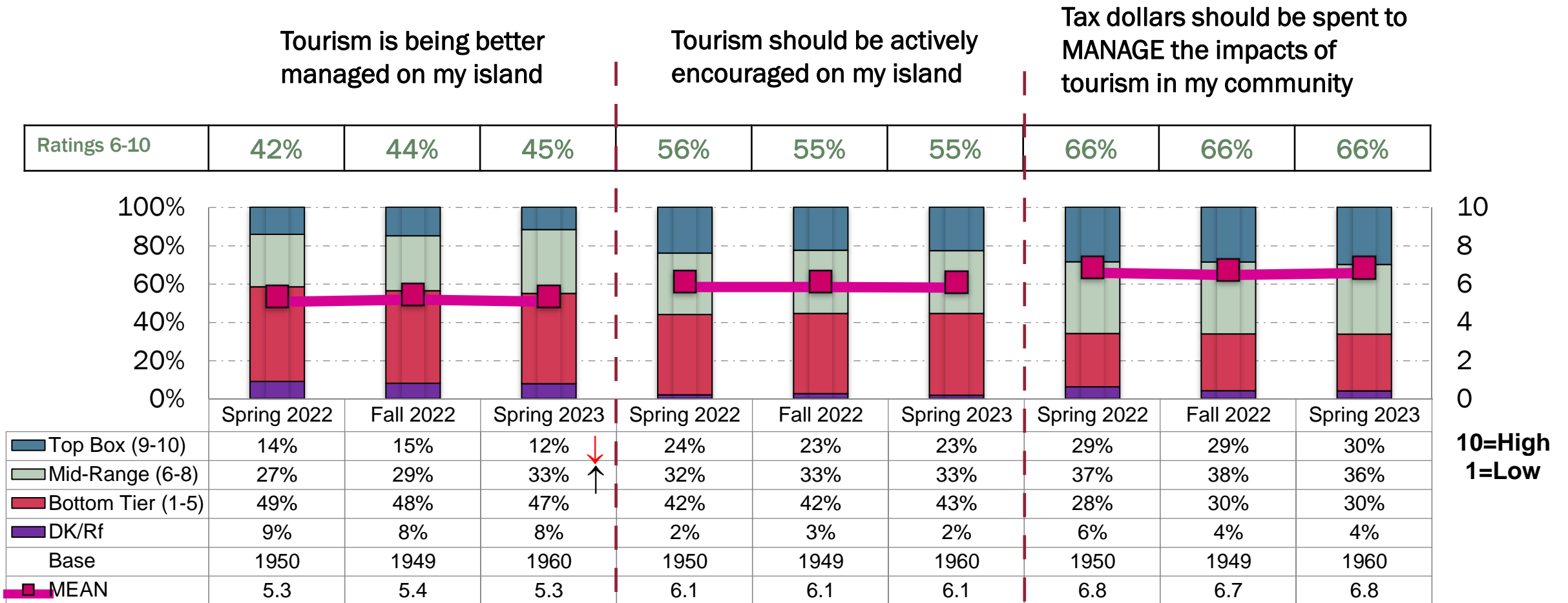
Are you aware that the HTA is working on.....?

	Statewide	O'ahu	Hawai'i Island	Maui County	Kaua'i
<i>Percent of residents aware of at least one HTA Destination Stewardship initiative</i>	59%	60%	54%	61%	52%
<i>For example:</i>		Visitor communications program to encourage respectful visitor behavior	Protection and preservation of culturally significant places and hotspots	Developing Regenerative tourism initiatives	Policies that address overtourism by managing people while on Kaua'i

Awareness of Destination Stewardship initiatives positively impacts Resident Sentiment

Mean Score	Aware	Unaware
<i>Perceived impact of tourism on you and your family</i>	6.4	5.7
<i>Tourism is being better managed on my island</i>	5.7	4.8
<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.0	5.1

Destination Stewardship Indicators



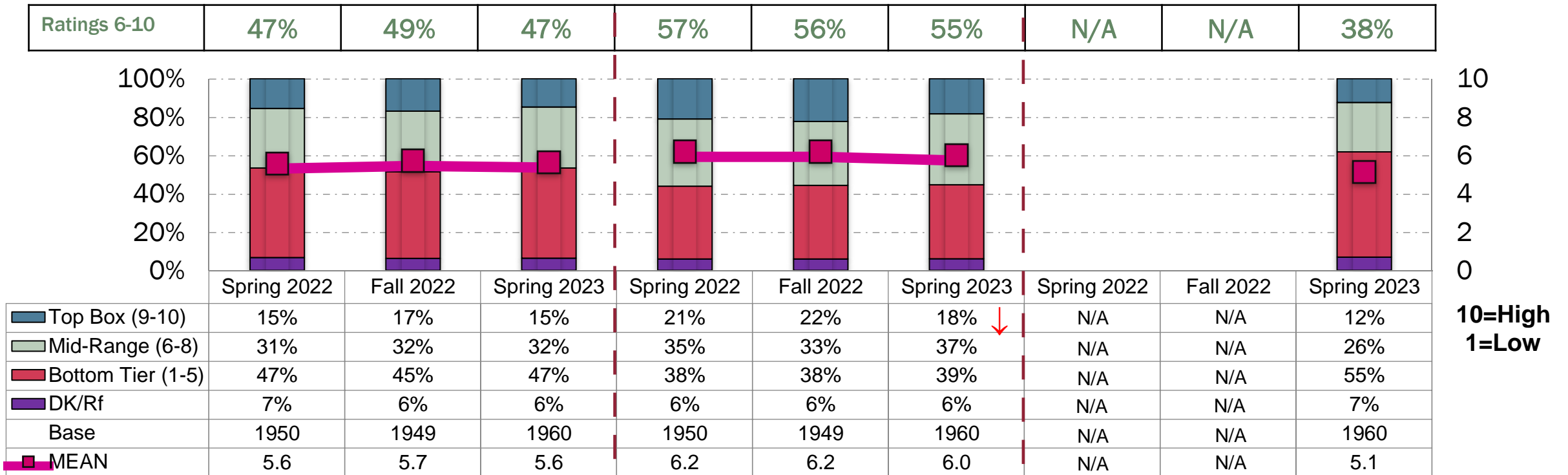
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Destination Stewardship Indicators (Continued)

More effort is being made to balance economic benefits of tourism and quality of life for residents

Tourism helps fund the stewardship of Hawai'i's natural resources, parks & cultural sites

NEW: Natural resources in my community are being improved and better maintained



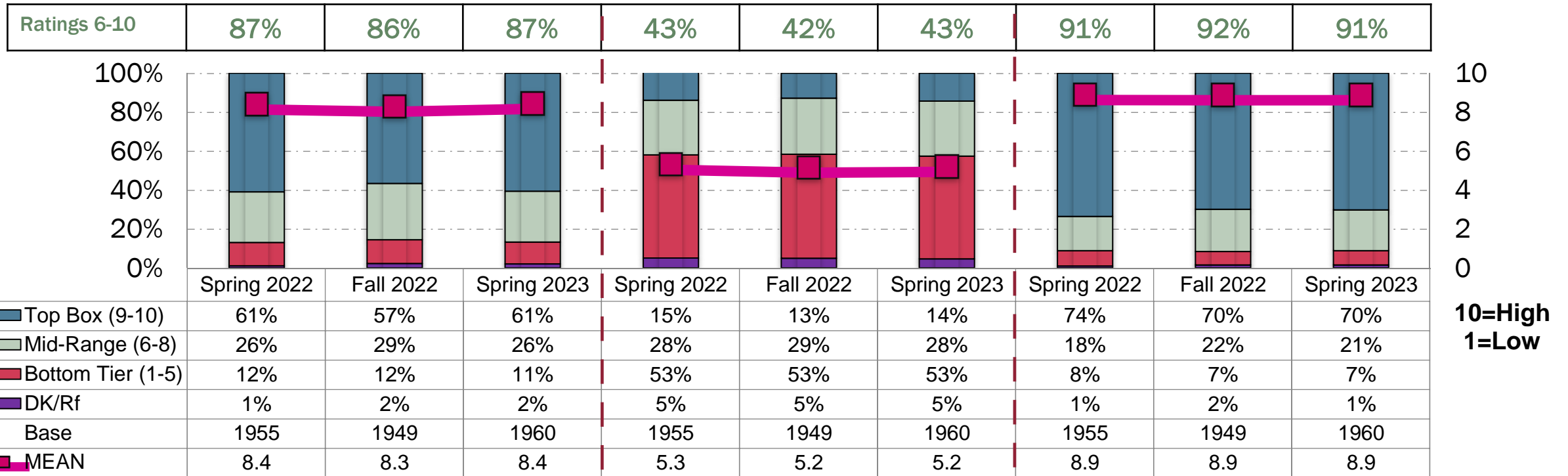
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Native Hawaiian Cultural & Sustainability Indicators

Authentic presentation of Native Hawaiian language and culture is important

Tourism contributes to the perpetuation of Native Hawaiian culture and language

Visitors need to be educated about protecting Hawai'i's natural environment and cultural resources.

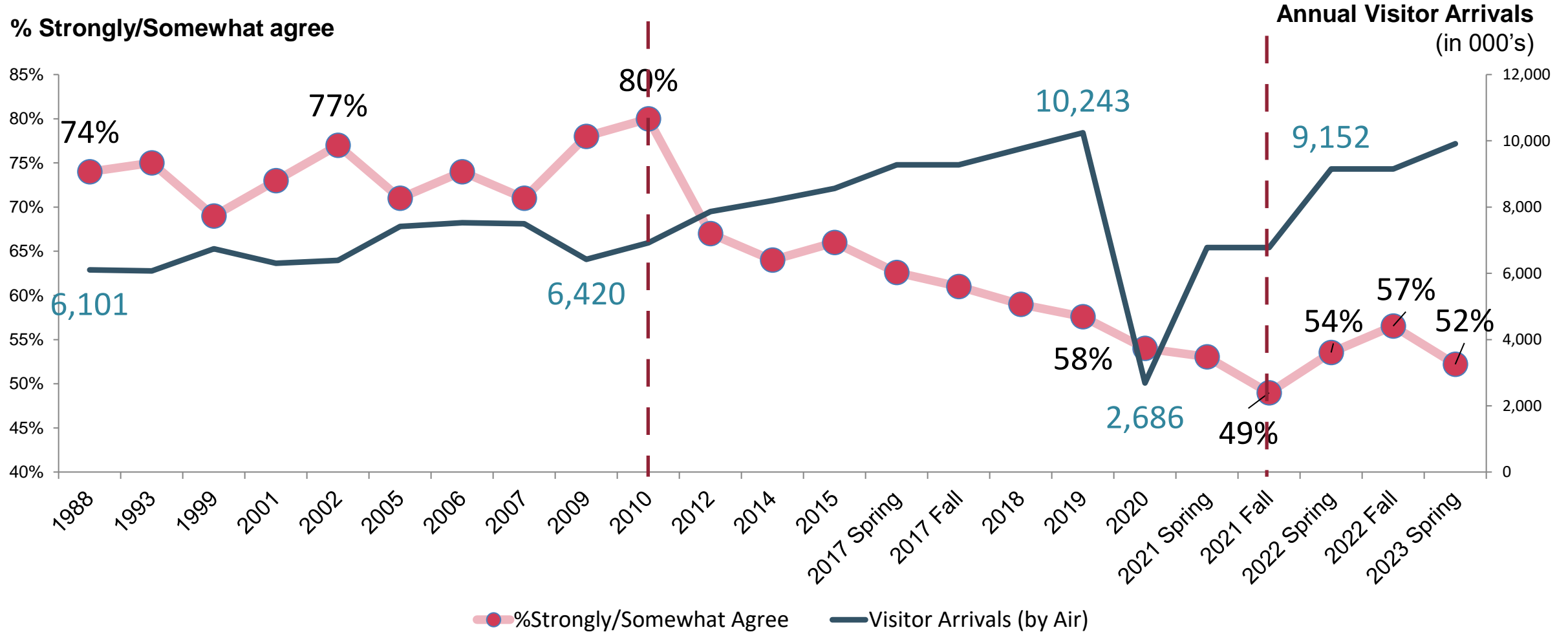


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



The perceived balance of tourism's benefits vs. challenges is shifting

“Tourism has brought more benefits than problems” eases

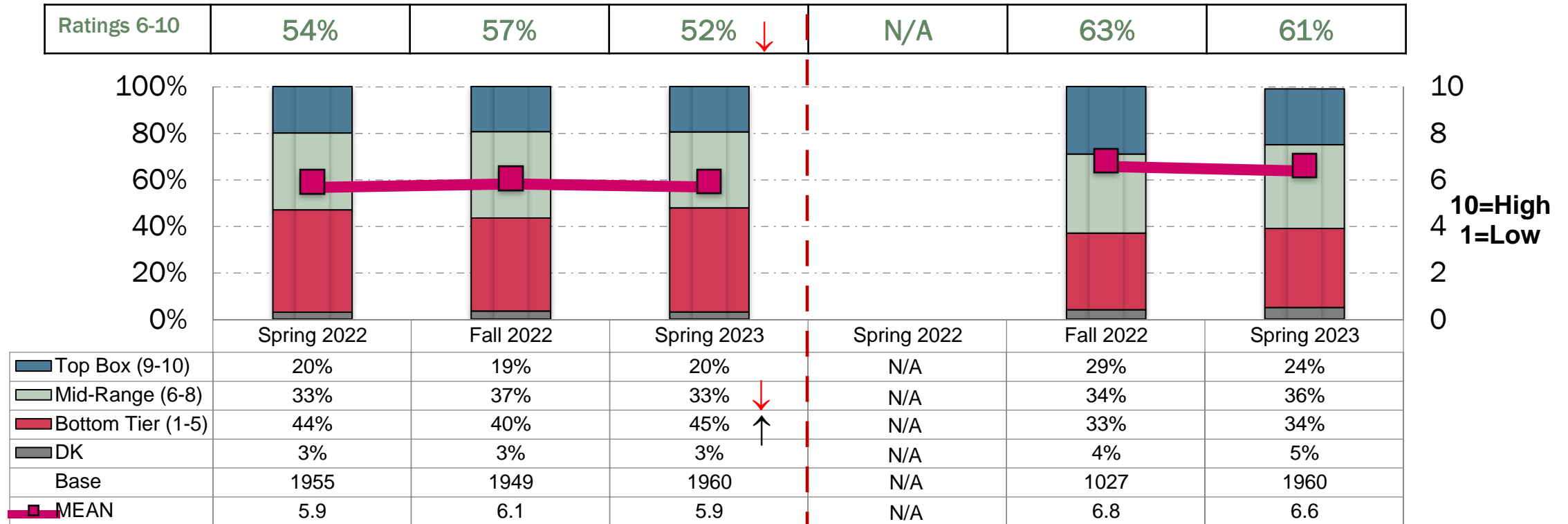


Q.4. How much do you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.
 Note: % that Strongly/Somewhat Agree defined as Rating of 6 to 10 on 10-point scale.

Balance: Benefits vs. Problems, Is Tourism Worth the Issues?

Tourism has brought more benefits than problems

Tourism is worth the issues associated with the industry



Q.4. I'm going to read you some statements about tourism, and ask you to 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 meaning Do Not Agree At All. You can choose any number between 1 and 10.

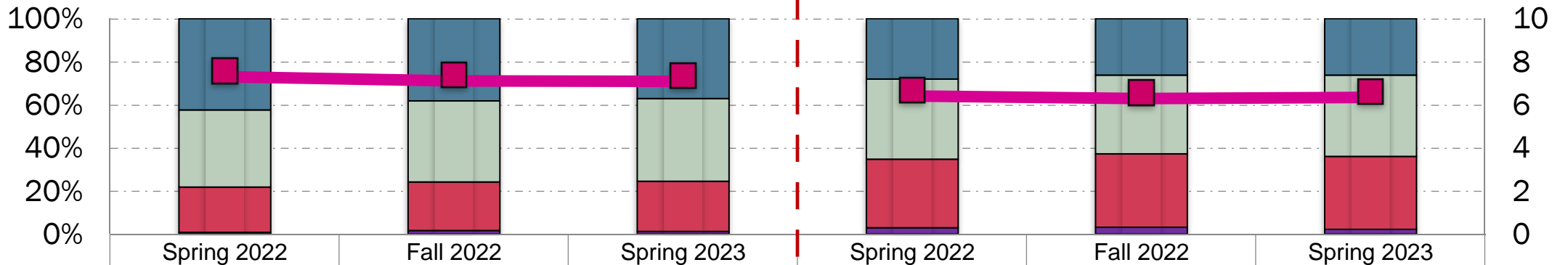
Q.3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. In your opinion, using the scale below, is tourism worth the issues associated with the industry? [Scale of 1 to 10, with 10 being Definitely Worth the Issues and 1 meaning Definitely Not Worth the Issues.]

Economic Impact Indicators

Creates job opportunities for residents

Creates job opportunities with paths for advancement

Ratings 6-10	78%	76%	75%	65%	63%	64%
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	Spring 2022	Fall 2022	Spring 2023	Spring 2022	Fall 2022	Spring 2023
Top Box (9-10)	42%	38%	37%	28%	26%	26%
Mid-Range (6-8)	36%	38%	38%	37%	37%	38%
Bottom Tier (1-5)	21%	23%	23%	32%	34%	34%
DK/Rf	1%	2%	1%	3%	3%	2%
Base	1950	1949	1960	1950	1949	1960
MEAN	7.6	7.4	7.4	6.7	6.6	6.6

10
8
6
4
2
0
10=High
1=Low

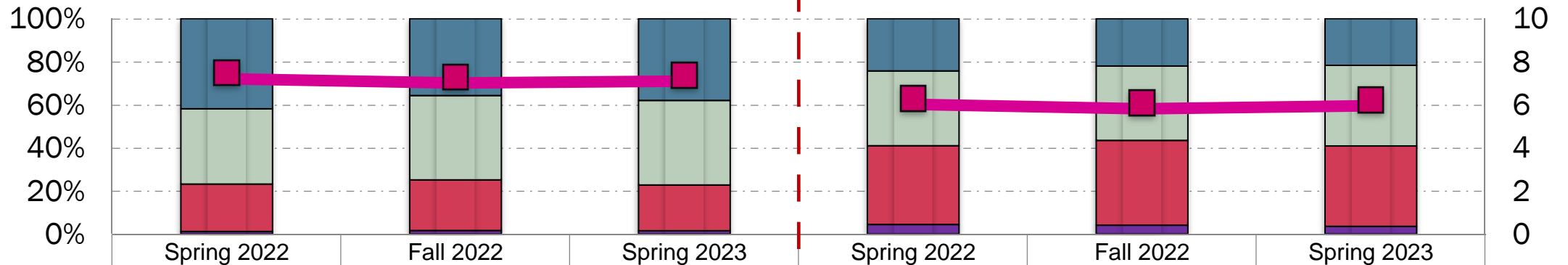
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Economic Impact Indicators (continued)

Supports our local businesses like retail, dining, etc.

Supports other industries important to residents like agriculture

Ratings 6-10	77%	75%	77%	59%	57%	59%
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	Spring 2022	Fall 2022	Spring 2023	Spring 2022	Fall 2022	Spring 2023
Top Box (9-10)	42%	36%	38%	24%	22%	22%
Mid-Range (6-8)	35%	39%	39%	35%	35%	37%
Bottom Tier (1-5)	22%	24%	21%	37%	39%	37%
DK/Rf	1%	2%	1%	4%	4%	4%
Base	1950	1949	1960	1950	1949	1960
MEAN	7.5	7.3	7.4	6.3	6.1	6.2

10
8
6
4
2
0
10=High
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Q.4. I'm going to read you some statements about tourism, and ask you to 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 meaning Do Not Agree At All. You can choose any number between 1 and 10.

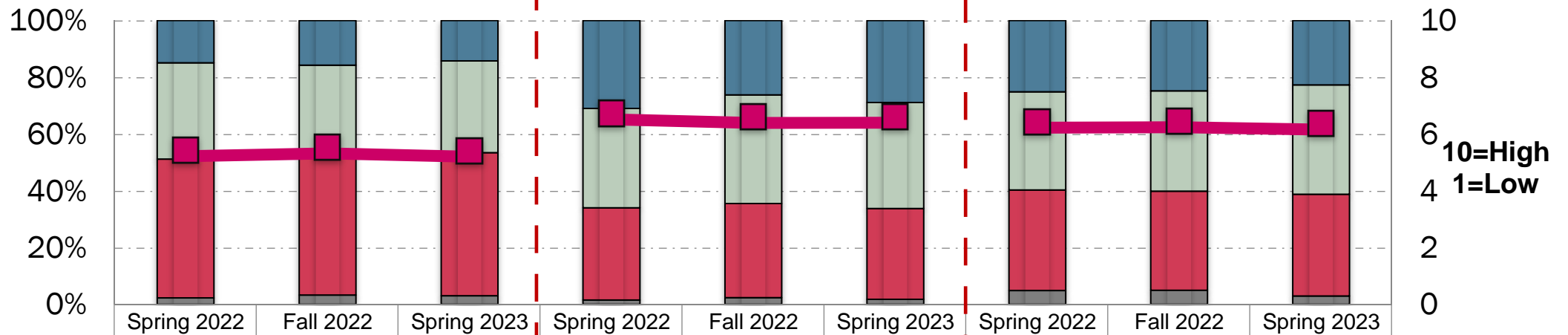
Quality of Life Indicators

Enhances residents' quality of life

Creates shopping, dining & entertainment opportunities

Sponsors festivals, activities & sports events for residents and visitors

Ratings 6-10	49%	48%	47%	66%	64%	66%	60%	60%	61%
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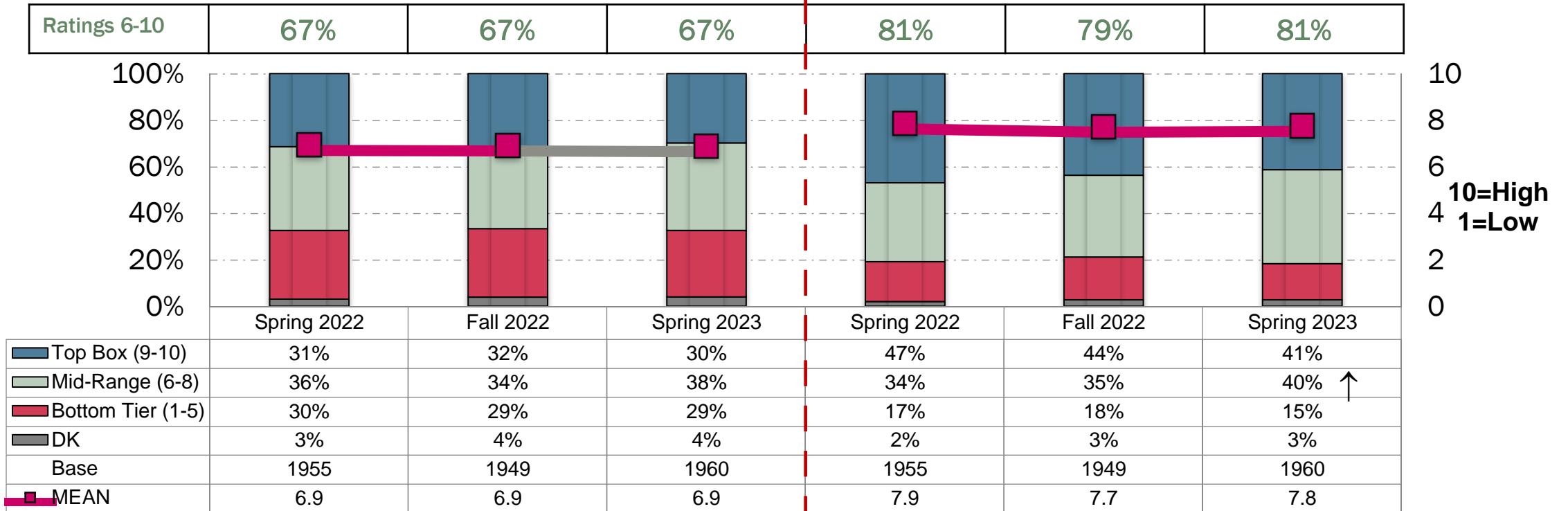
	Spring 2022	Fall 2022	Spring 2023	Spring 2022	Fall 2022	Spring 2023	Spring 2022	Fall 2022	Spring 2023
Top Box (9-10)	15%	16%	14%	31%	26%	29%	25%	25%	23%
Mid-Range (6-8)	34%	32%	32%	35%	38%	37%	35%	35%	39%
Bottom Tier (1-5)	49%	49%	50%	32%	33%	32%	35%	35%	36%
DK	2%	3%	3%	2%	2%	2%	5%	5%	3%
Base	1950	1949	1960	1950	1949	1960	1950	1949	1960
MEAN	5.4	5.5	5.4	6.7	6.6	6.6	6.4	6.5	6.4

Q.4. I'm going to read you some statements about tourism, and ask you to 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 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Balance: Challenges of Tourism Indicators

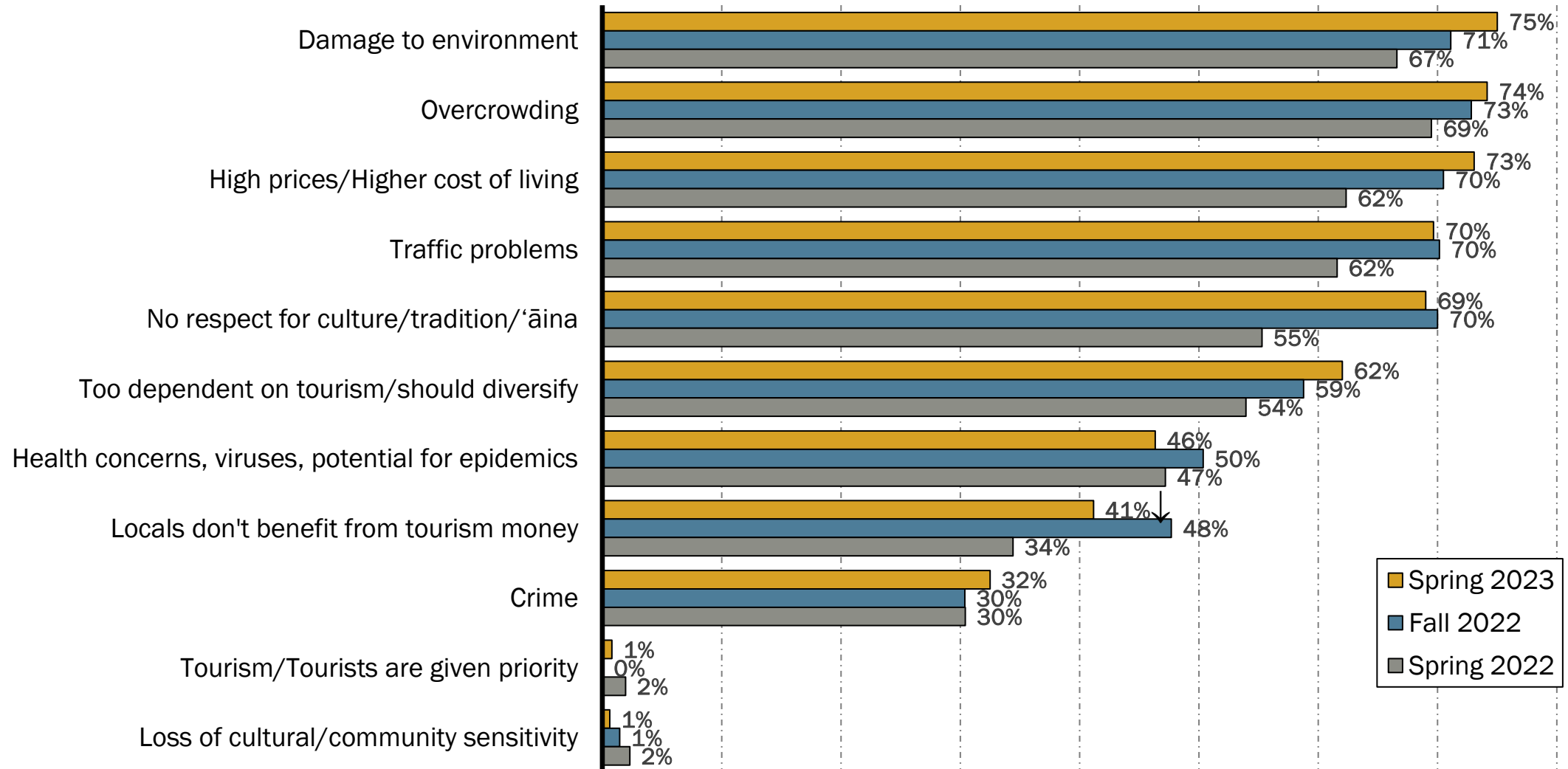
Island is run for tourists at expense of local people

Island economy is too dependent on tourism



Q.4. I'm going to read you some statements about tourism, and ask you to 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 meaning Do Not Agree At All. You can choose any number between 1 and 10.

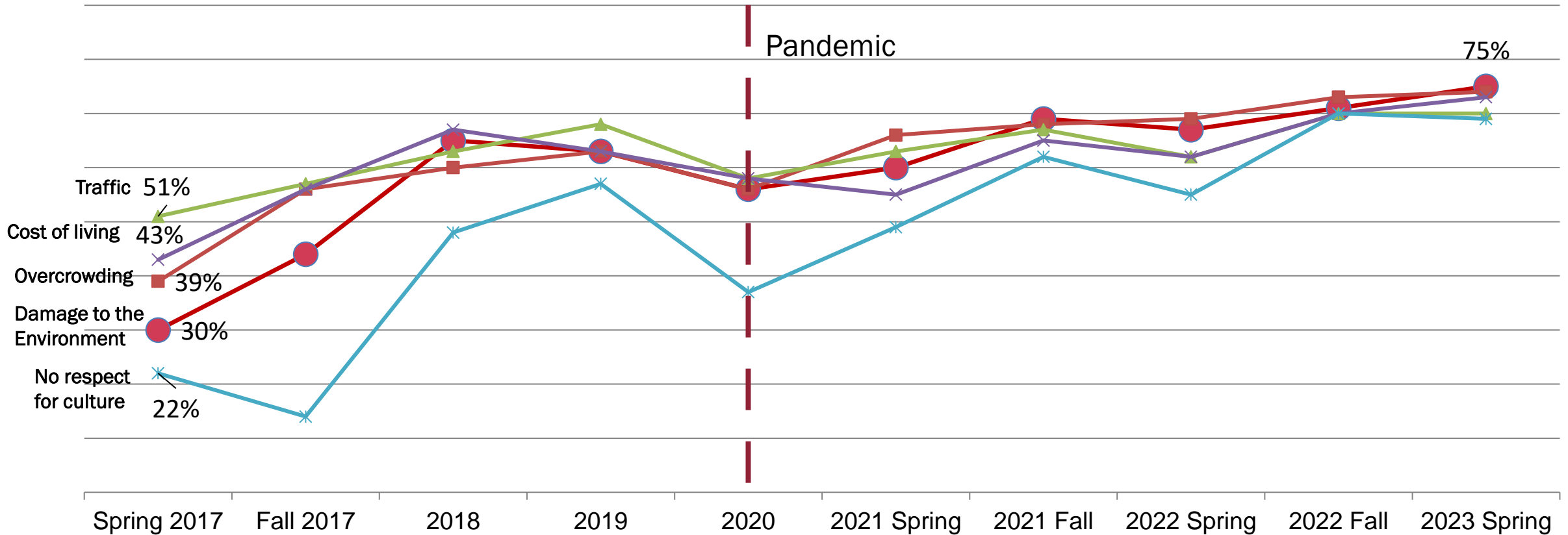
Destination stewardship challenges in Hawai'i (2022-2023)



Base: Spring 2022 (856), Fall 2022 (871), Spring 2023 (902)

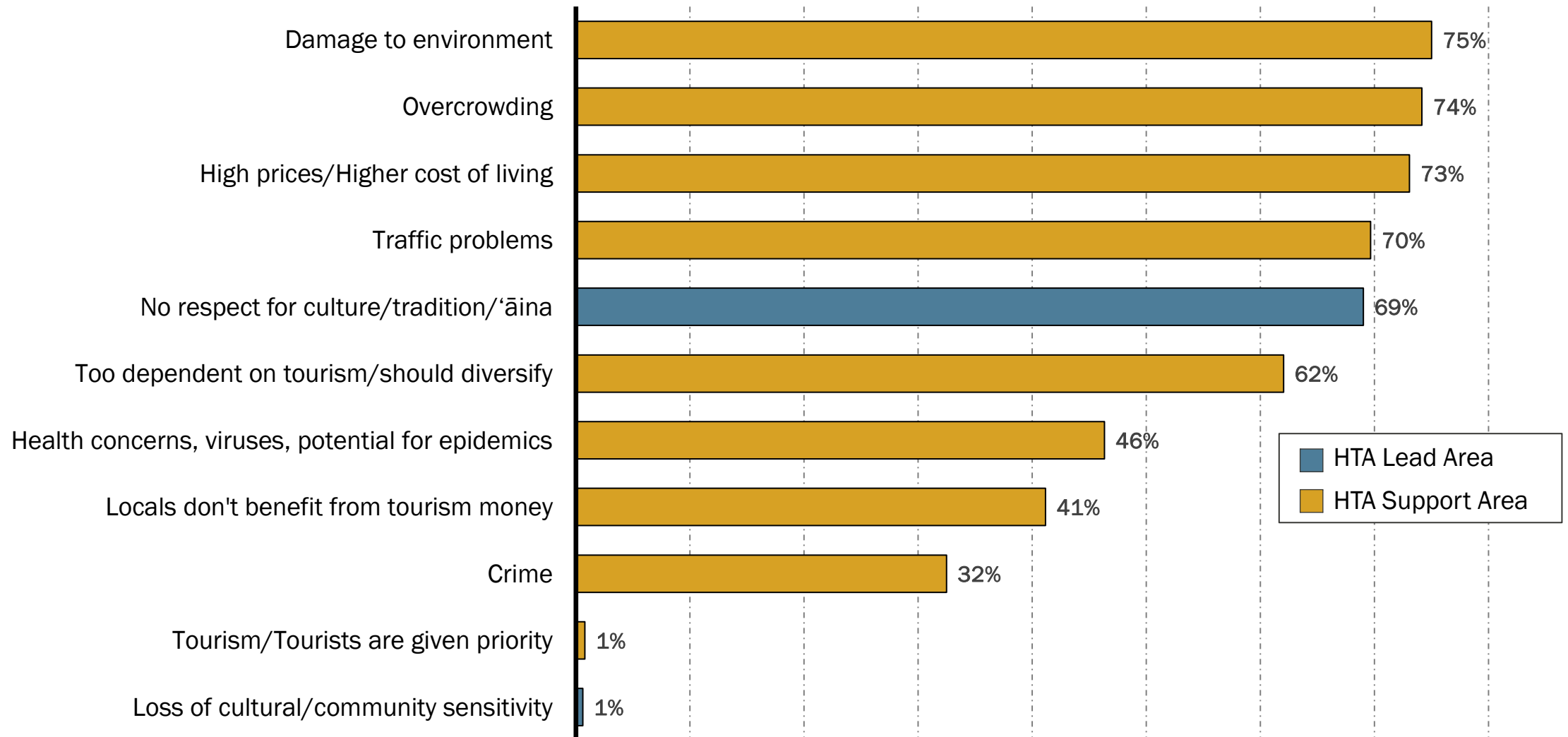
Q5. In your opinion, what problems do you think tourism has created in Hawai'i? (i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

Changes in Perceived Challenges Created by Tourism (2017- 2023)



Q5. In your opinion, what problems do you think tourism has created in Hawai'i?
(i.e., According to residents saying Hawai'i tourism creates more problems than benefits).

Opportunities for destination stewardship in Hawai'i (Spring 2023)



Base: Spring 2022 (856), Fall 2022 (871), Spring 2023 (902)

Q5. In your opinion, what problems do you think tourism has created in Hawai'i?
(i.e., According to residents saying Hawai'i tourism creates more problems than benefits).



Mahalo from the Omnitrak Group



Appendices

A: Background Information

B: Key Sentiment Indicators

C: Select Tourism Management Strategies

D: Drivers of Resident Sentiment



Appendix A: Background Information: Research Objectives, Sample Plan & Methodology

Research Objectives

- Resident sentiment toward Hawai'i's visitor industry is vital to maintaining Responsible and Regenerative Growth in the industry and in the state's economy overall.
- The Resident Sentiment Survey (RSS) has been conducted 21 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.
 - To explore resident perceptions on ideas to “manage” or mitigate the negative impacts associated with tourism.

Statistical Analysis – Within the reports' graphs and tables, a box or shaded area shows a statistically significant difference across columns (e.g. islands or attributes) in the same year at the 95% level of confidence.

An arrow ↑ or ↓ indicates a statistically significant difference when ratings are compared across years at the 95% confidence level.

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.

Statewide sampling produced a total of $n = 1960$ respondents as follows:

- O'ahu: 816
- Hawai'i Island: 453
- Maui Island: 326, Moloka'i: 50, Lana'i: 25
- Kaua'i: 290

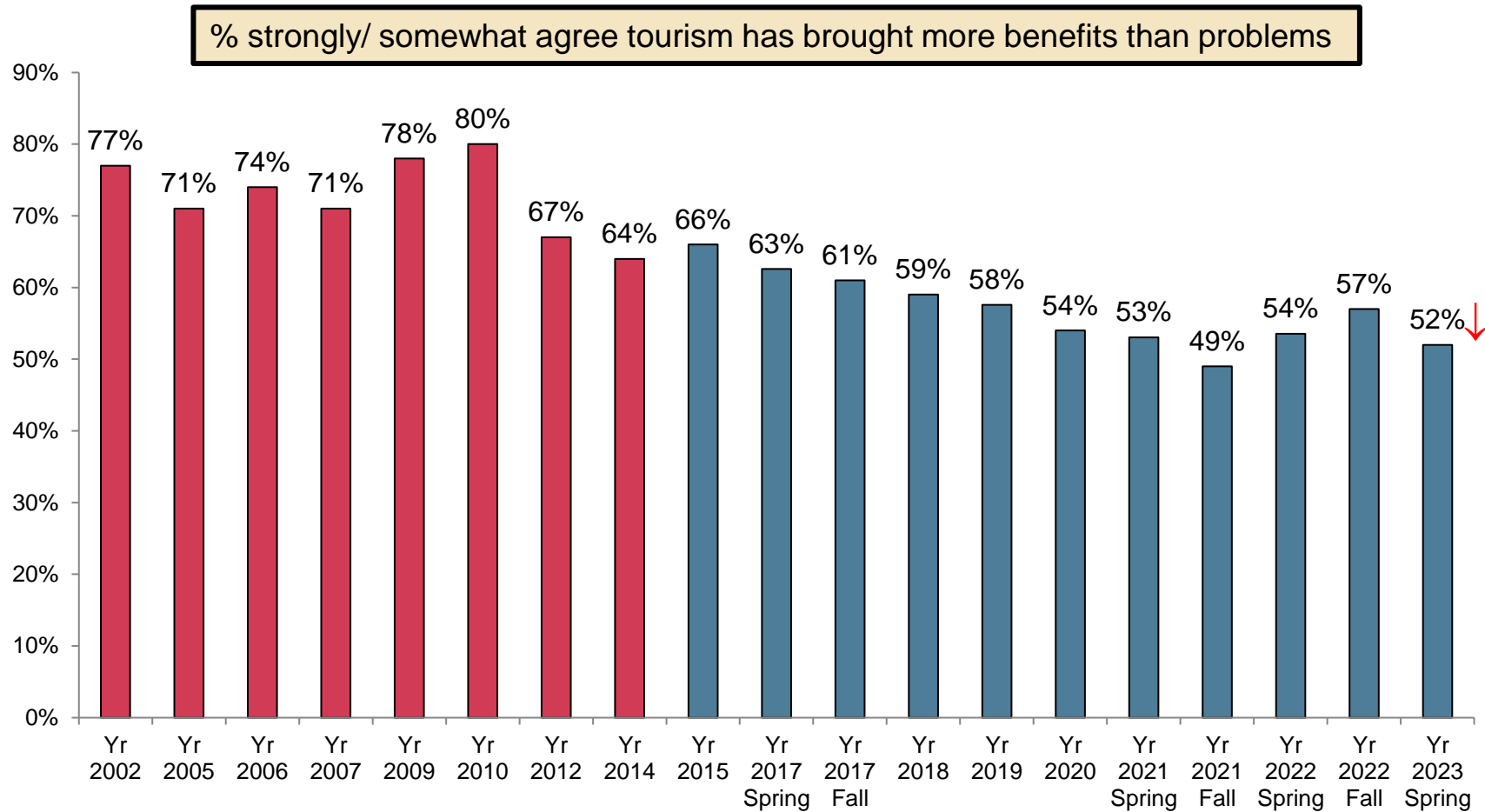
Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 24%) and online surveys (76%).
- All calls were placed from Omnitrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates: May 5 through June 22, 2023



Appendix B: Key Sentiment Indicators

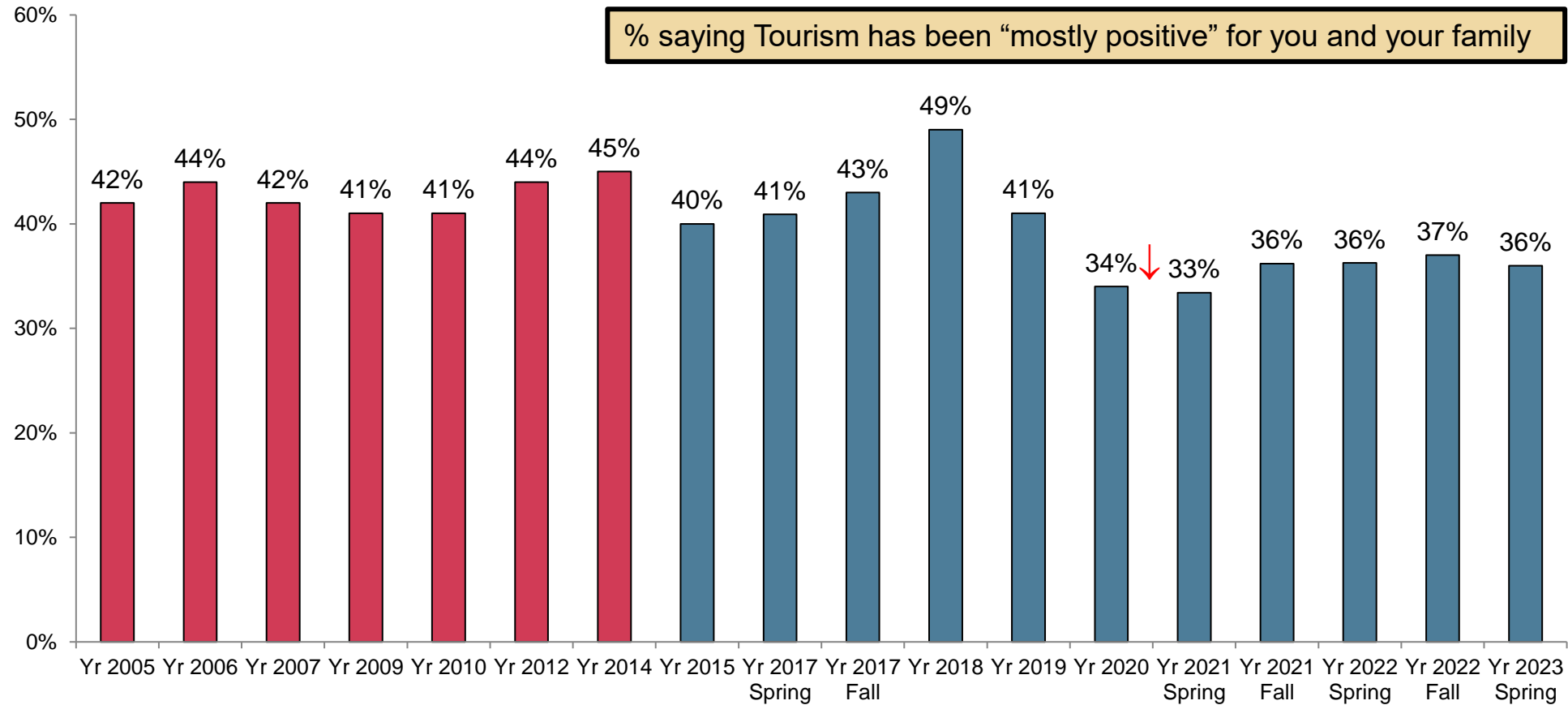
“Tourism has brought more benefits than problems” – *Overall Trend*



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.

Q4.1. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Impact of Tourism on You & Your Family – *Overall Trend*

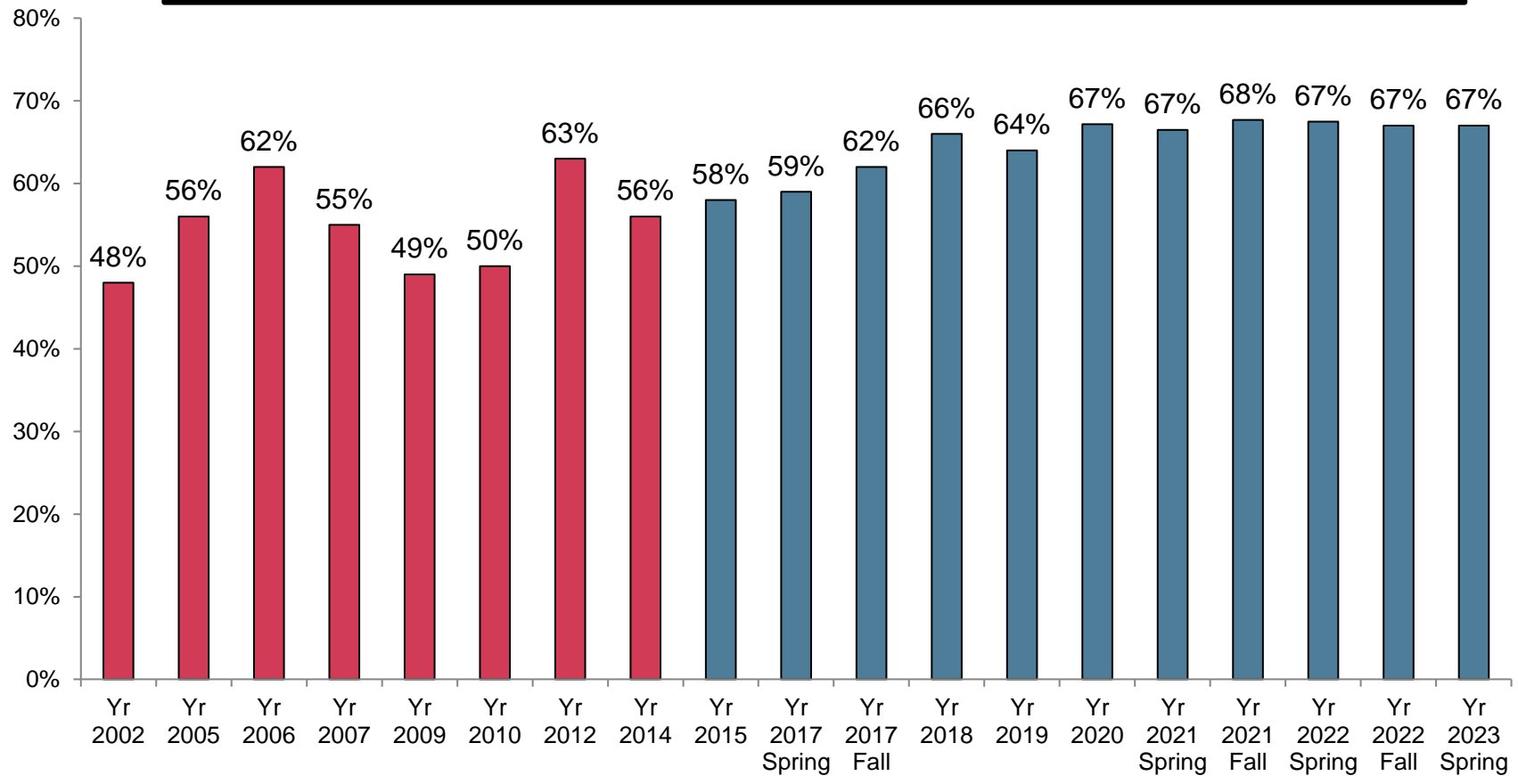


In order to track the data (change in rating scale) from 2009 on a rating of 7-10 was used to approximate the percent that felt positively about this statement.

Q2b. 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?

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

% strongly/ somewhat agree island is being run for tourists at expense of local people

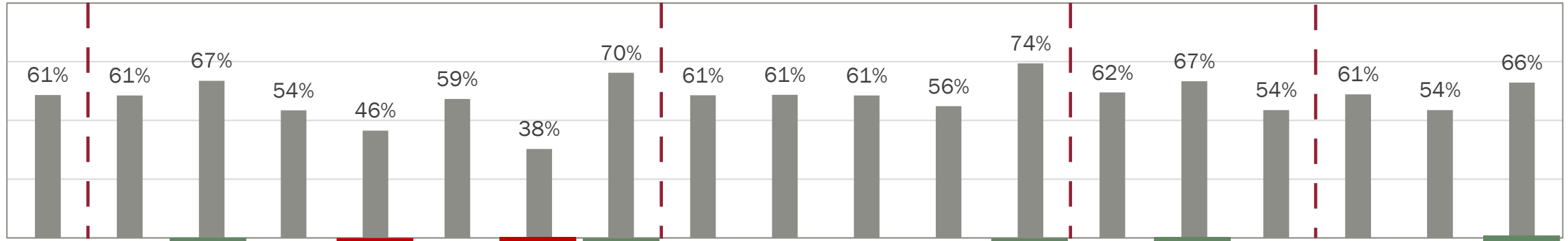


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

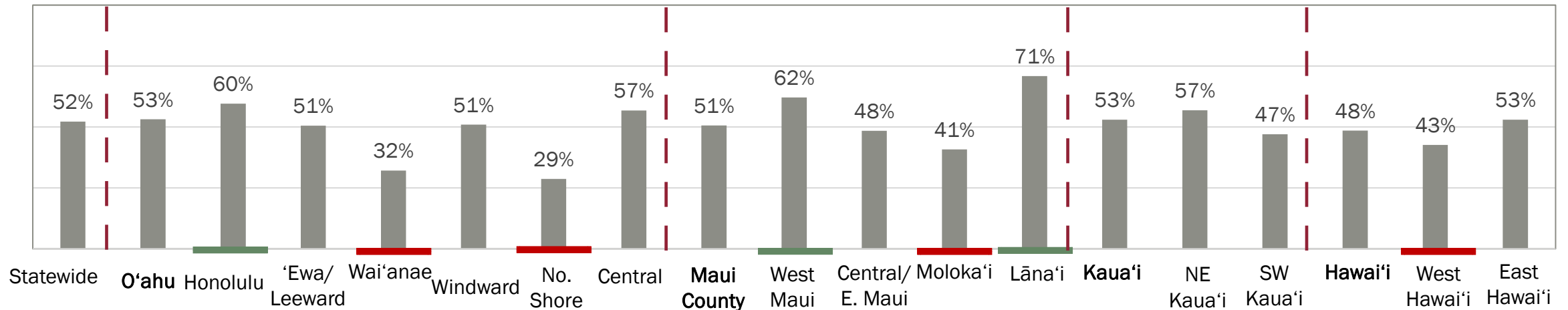
Q4.2. Using a 10-point scale where 10 means Completely Agree and 1 means Do Not Agree at All, how much do you agree or disagree that...?

Key Indicators by Island/Area

“Tourism is worth the issues associated with it” (6-10 Rating)



“Tourism has brought more benefits than problems” (Rating 6-10)

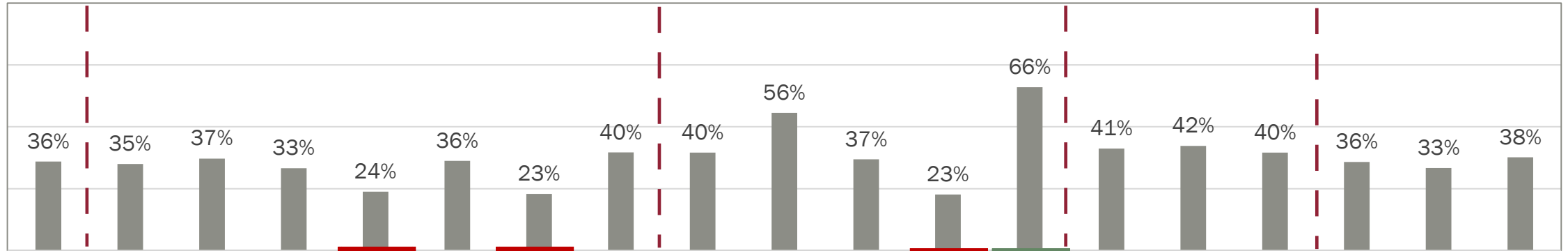


Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

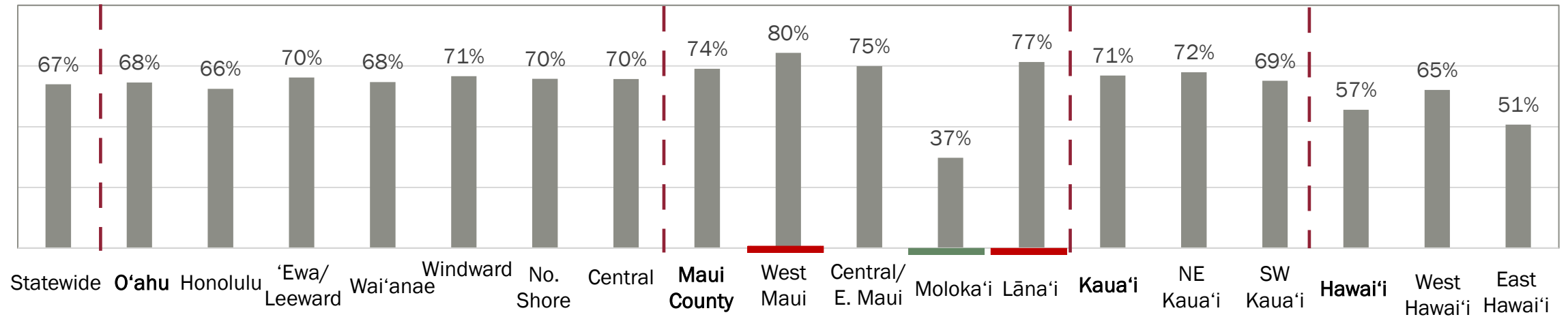
Q4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.

Key Indicators by Island/Area (continued)

“Tourism has been ‘mostly positive’ for you and your family” (Rating 7-10)



“This island is being run for tourists at the expense of local people” (Rating 6-10)



Q.4. I’m going to read you some statements about tourism, and ask you to 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 meaning Do Not Agree At All.

Q2a/b. 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?



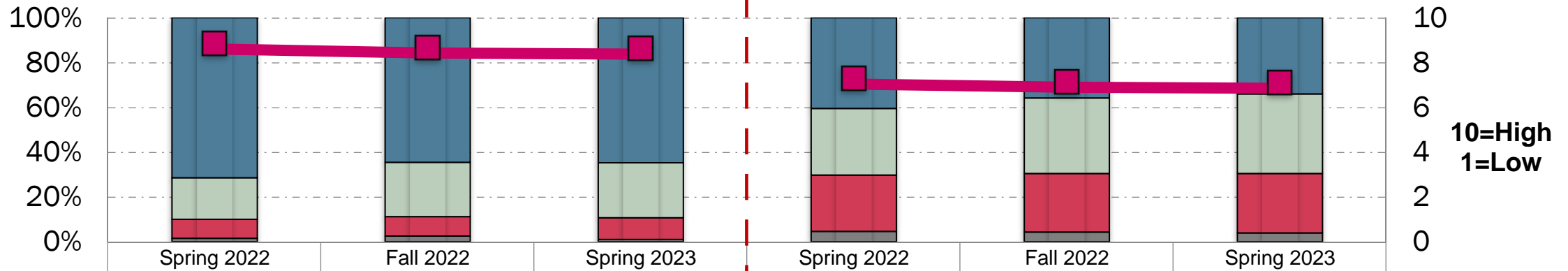
Appendix C: Select Tourism Management Strategies

Importance of Select Tourism Management Strategies - Regenerative

Educate visitors and residents to mālama the islands and each other

Encourage visitors to volunteer & give back during their visits to Hawai'i

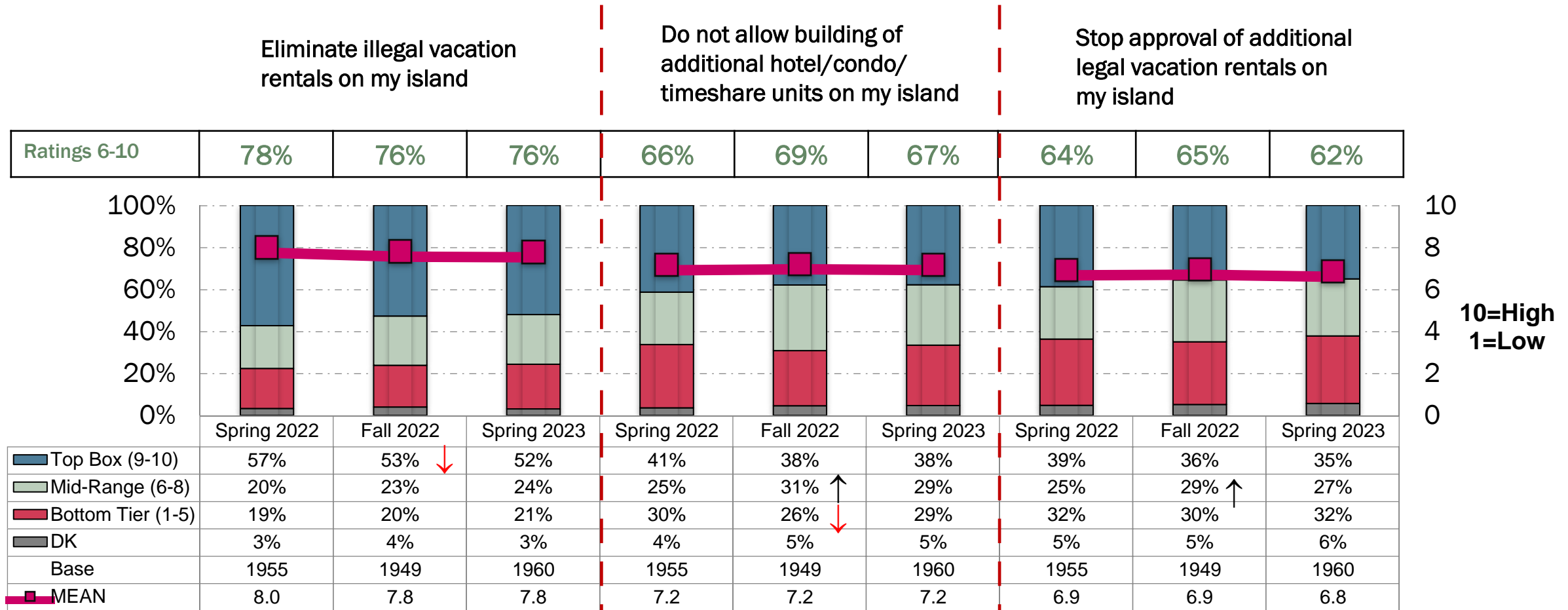
Ratings 6-10	90%	89%	89%	70%	70%	70%
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	Spring 2022	Fall 2022	Spring 2023	Spring 2022	Fall 2022	Spring 2023
Top Box (9-10)	72%	65% ↓	65%	40%	36% ↓	34%
Mid-Range (6-8)	19%	24% ↑	24%	30%	34% ↑	36%
Bottom Tier (1-5)	8%	9%	10%	25%	26%	27%
DK	1%	2%	1%	5%	4%	4%
Base	1955	1949	1960	1955	1949	1960
MEAN	8.8	8.7	8.6	7.3	7.1	7.1

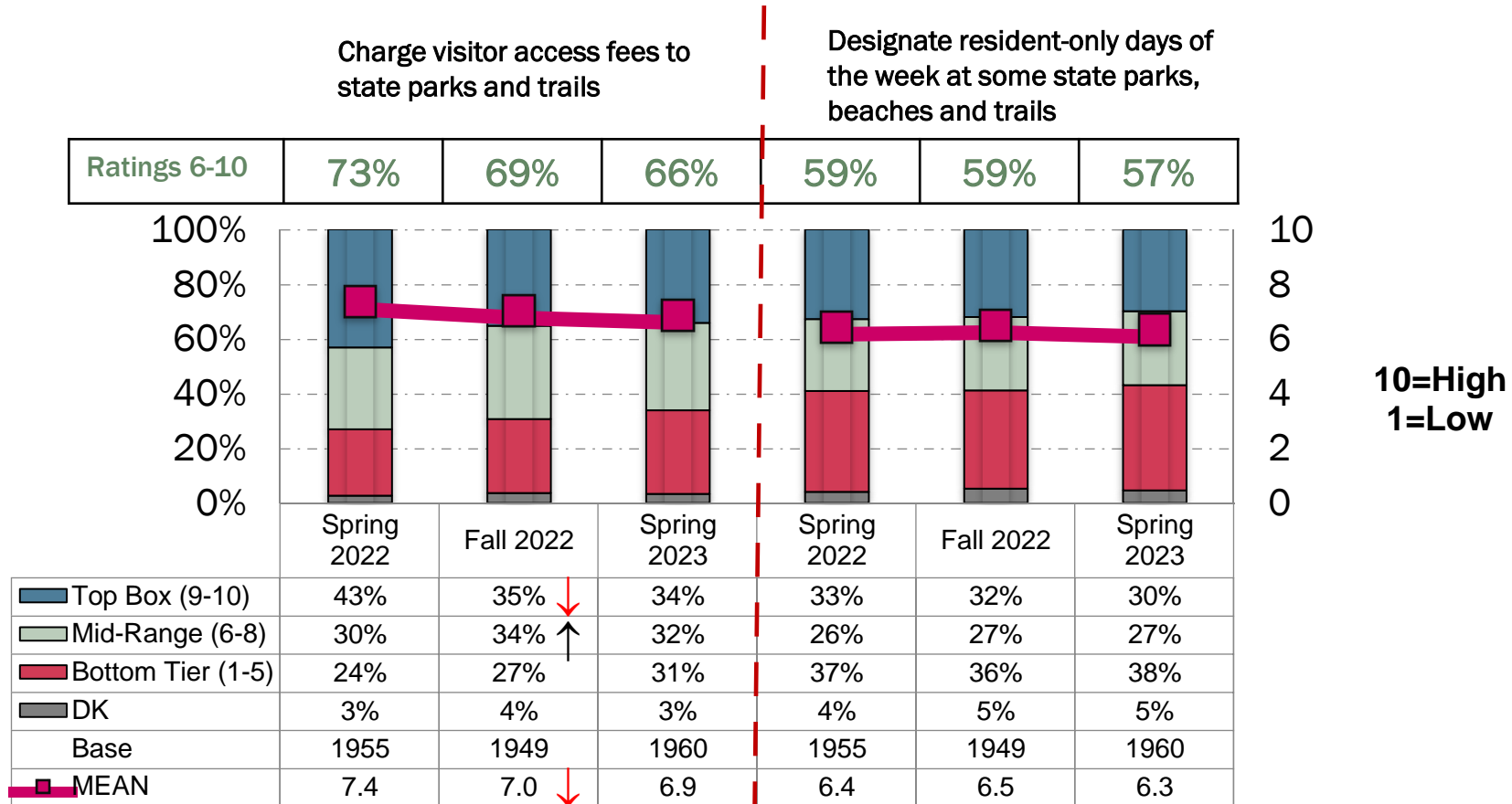
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Importance of Select Tourism Management Strategies - Accommodations



Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Importance of Select Tourism Management Strategies - Access



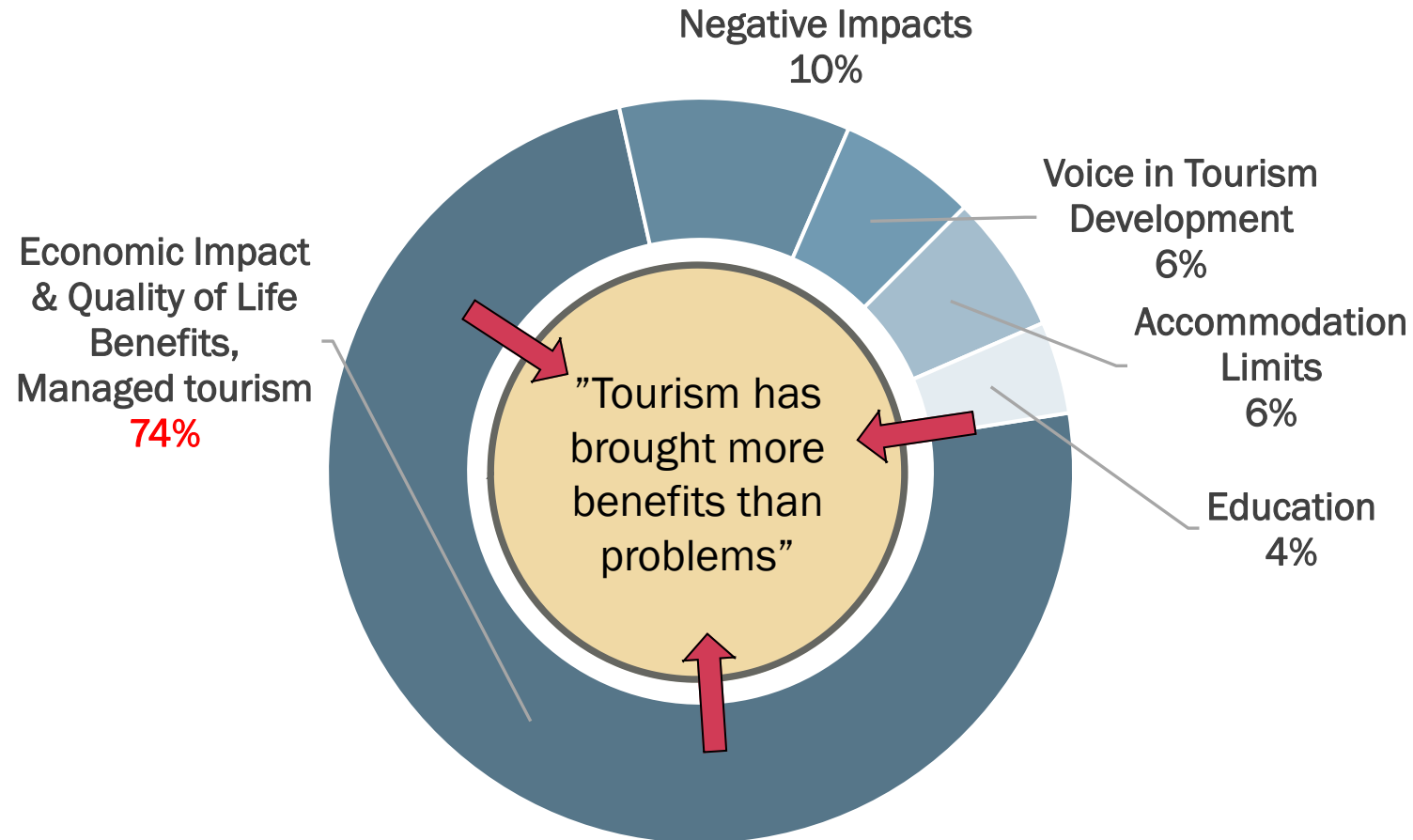
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?



Appendix D: Drivers of Resident Sentiment

Economic/Quality of Life Benefits + Tourism Management = Resident Sentiment

Drivers of Resident Sentiment – Spring 2023



Changes in Drivers of Resident Sentiment

