

Resident Sentiment Survey Fall 2022 Highlights



Prepared for the:
State Department of Business, Economic Development & Tourism: Project #5826
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What's the Big Idea?

- 1** Residents feel that more effort is being made to balance the economic benefits of tourism and quality of life for residents.
- 2** Resident attitudes toward tourism are shaped by this balance between economic benefits and quality of life impacts, and tourism management efforts to improve this balance.
- 3** As a result, Resident Sentiment is recovering after a prolonged downturn.





1

Balance: Residents feel that more effort is being made to balance the economic benefits of tourism and quality of life for residents.

Resident Quality of Life, Tourism Management Indicators

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

Tourism is an industry that enhances residents' quality of life

Tourism is being better managed on my island

Tax dollars should be spent to MANAGE the impacts of tourism in my community

Ratings 6 to 10

46%

49%

49%

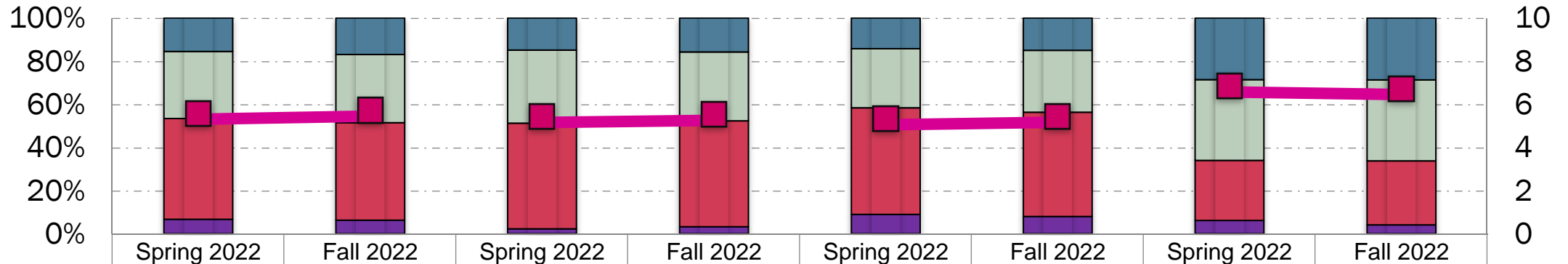
48%

41%

44%

66%

67%

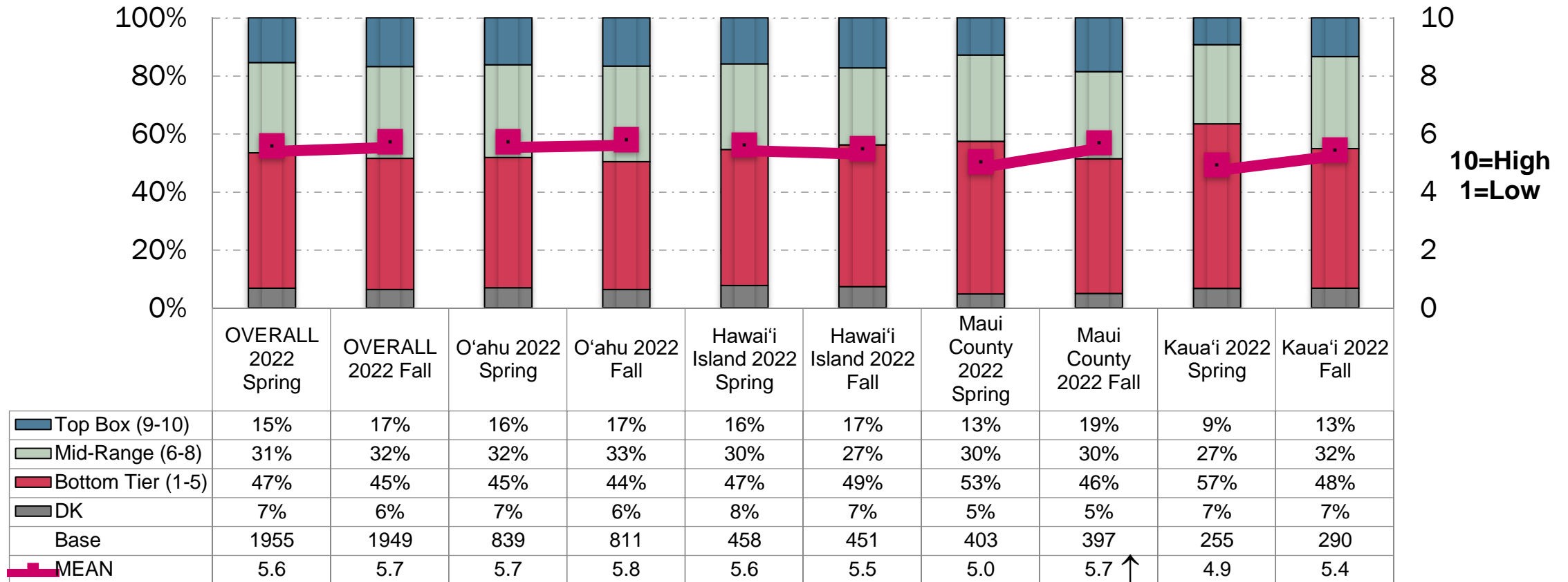


	Spring 2022	Fall 2022	Spring 2022	Fall 2022	Spring 2022	Fall 2022	Spring 2022	Fall 2022
Top Box (9-10)	15%	17%	15%	16%	14%	15%	29%	29%
Mid-Range (6-8)	31%	32%	34%	32%	27%	29%	37%	38%
Bottom Tier (1-5)	47%	45%	49%	49%	49%	48%	28%	30%
DK/Rf	7%	6%	2%	3%	9%	8%	6%	4%
Base	1950	1949	1950	1949	1950	1949	1950	1949
MEAN	5.6	5.7	5.4	5.5	5.3	5.4	6.8	6.7

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

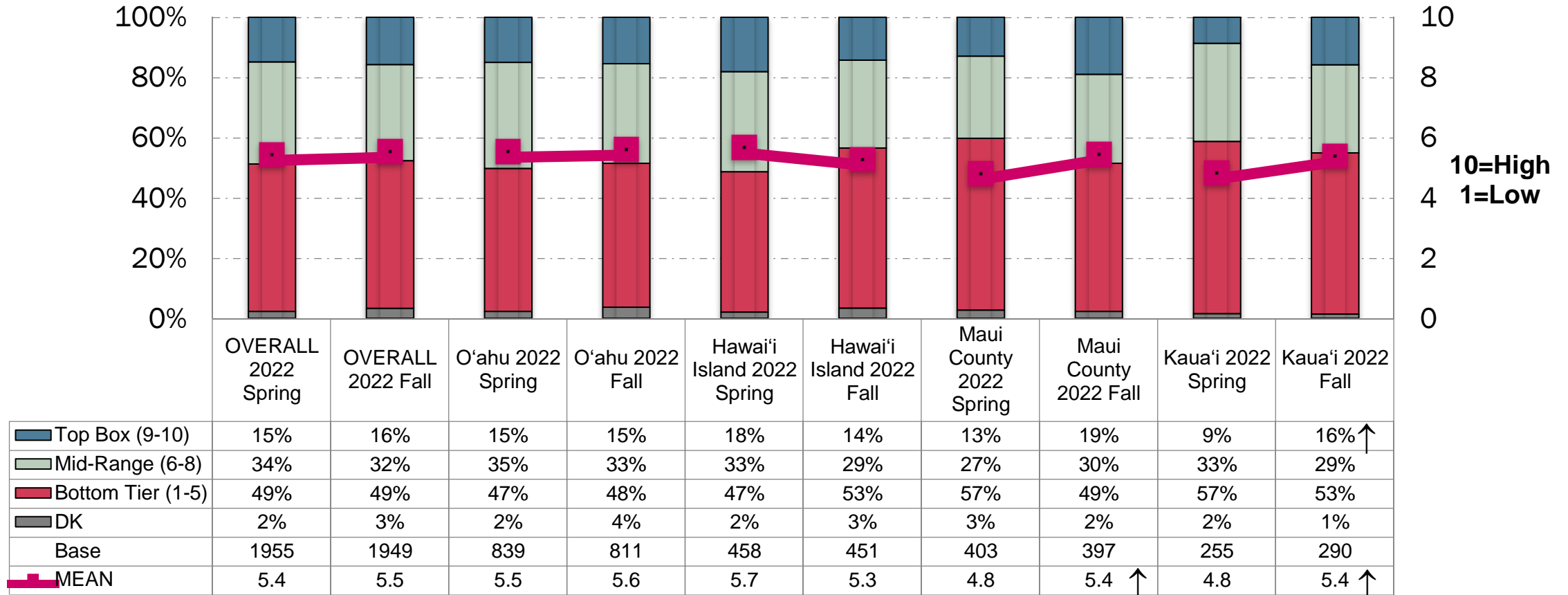
Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By County*



Q4.12. 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.

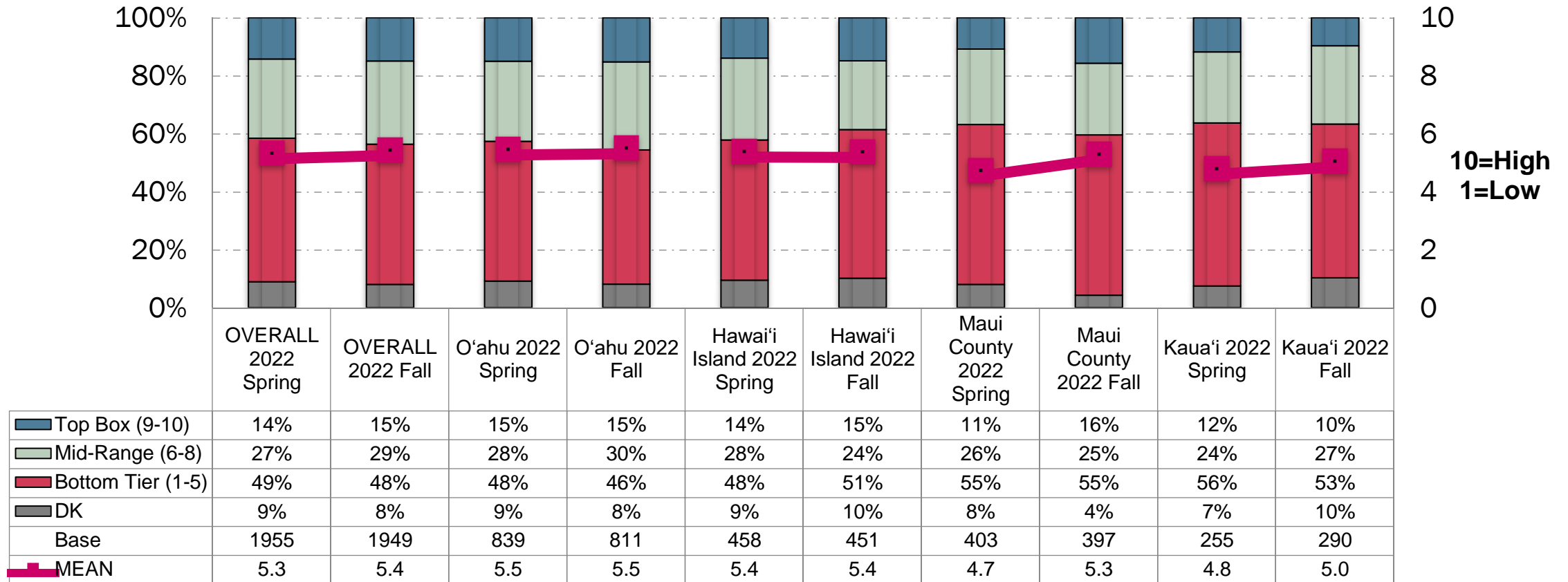
“Is an industry that enhances residents’ quality of life” – *By County*



Q3.6. 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...?

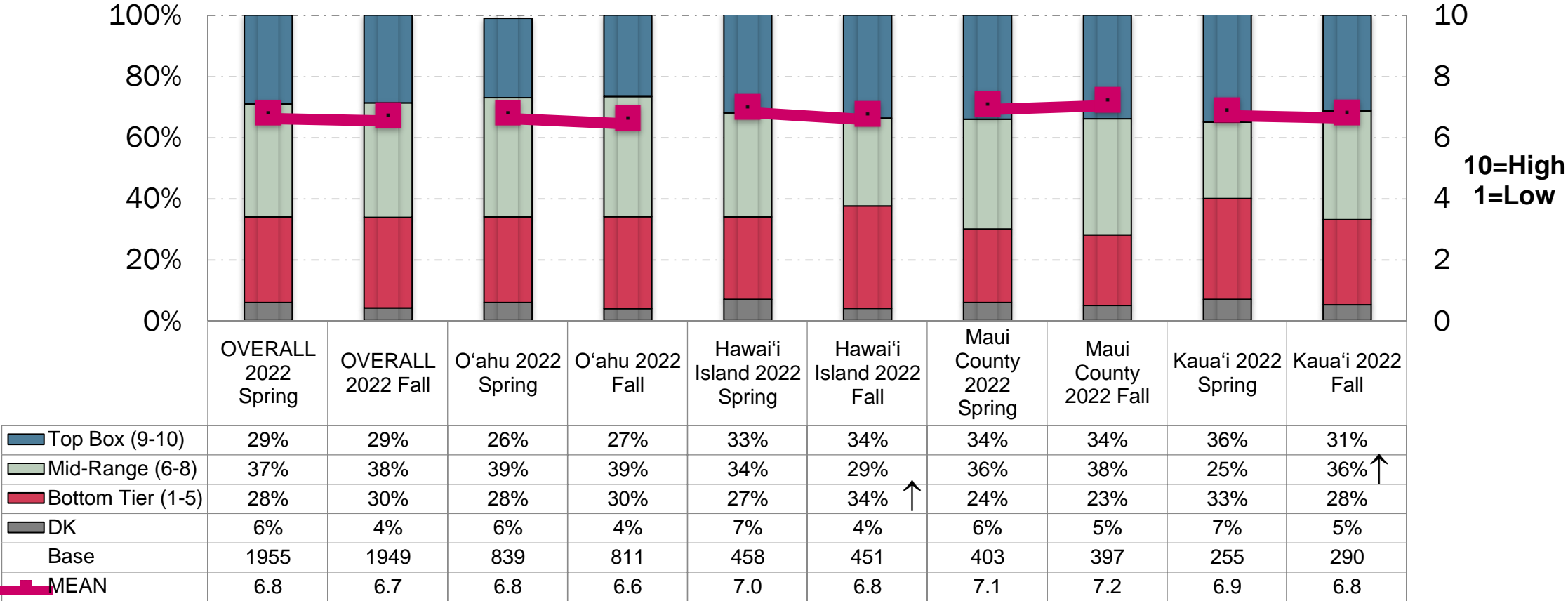
“I feel like tourism is being better managed on my island”

– *By County*



Q4.12. 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.

“Tax dollars should be spent to MANAGE the impacts of tourism in my community.” – *By County*



Q13. Using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All, how much do you agree or disagree that....[INSERT]

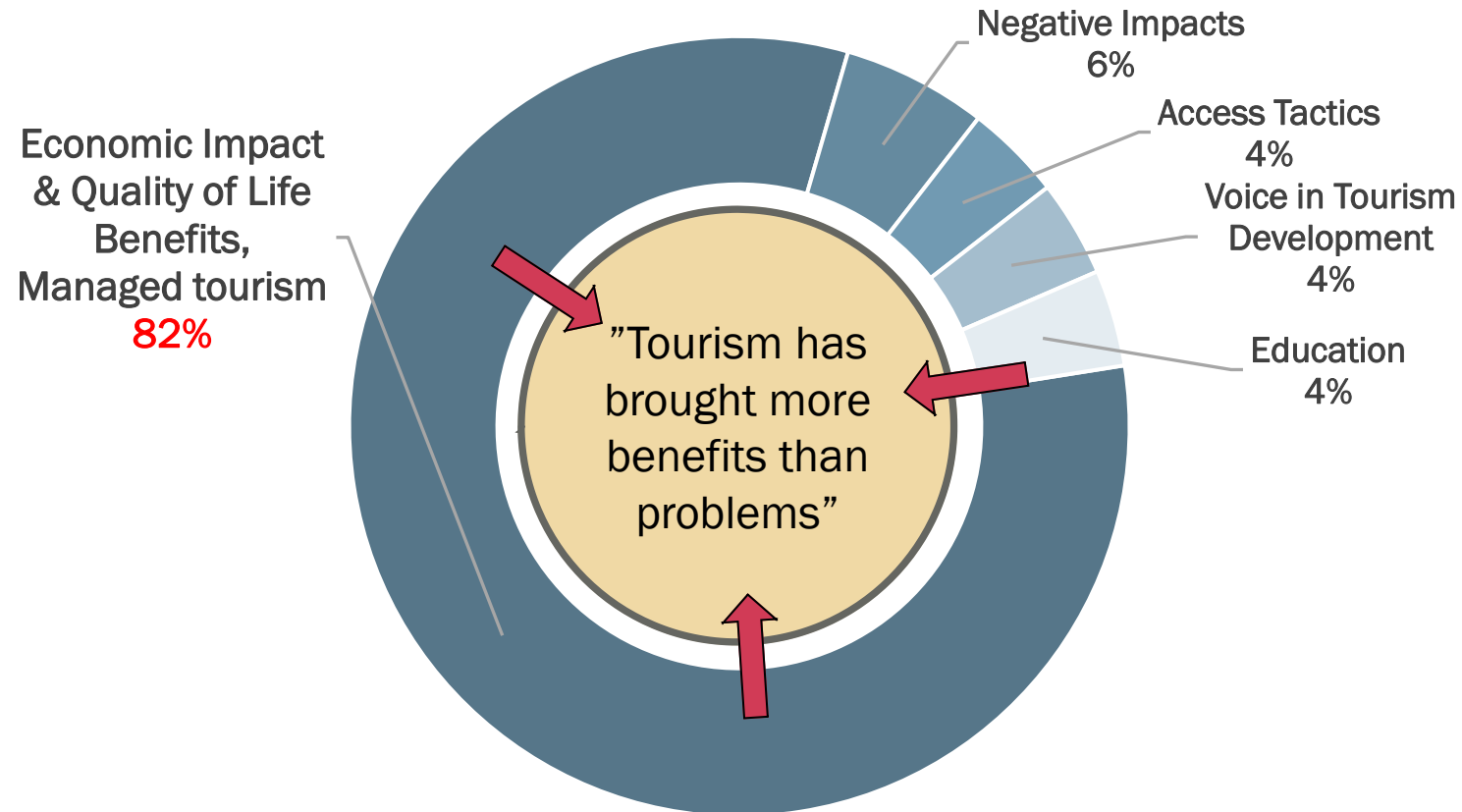


2

Tourism Management: Resident attitudes toward tourism are shaped by this balance between economic benefits and quality of life impacts, and tourism management efforts to improve this balance.

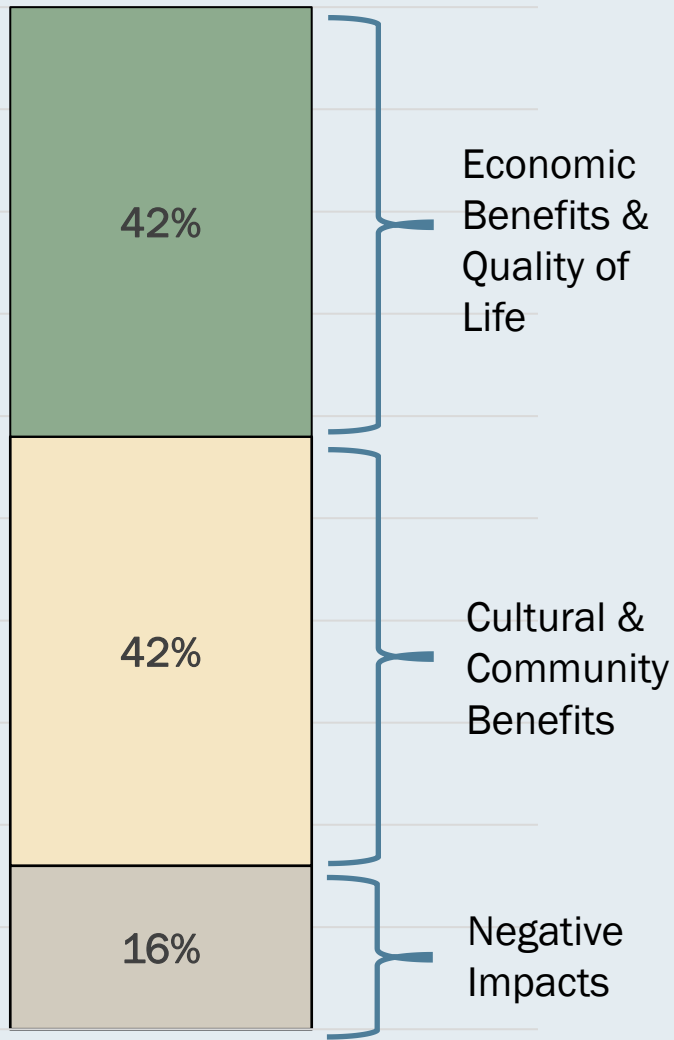
Economic/Quality of Life Benefits + Tourism Management = Resident Sentiment

Drivers of Resident Sentiment – Fall 2022

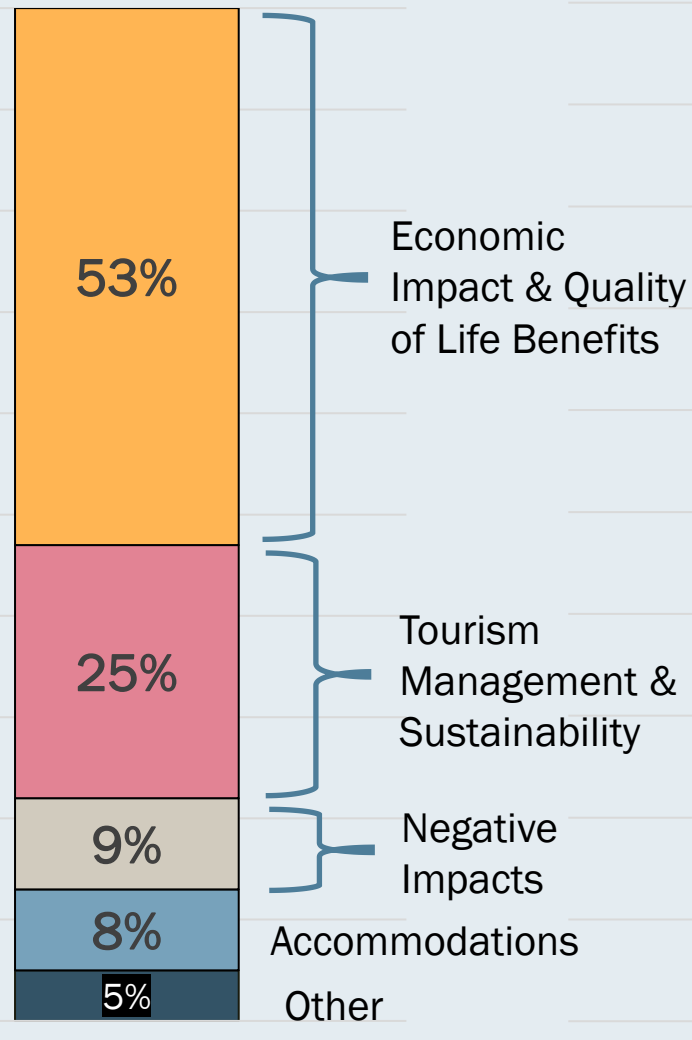


SHIFT: Balance between economic/quality of life impact & Managed Tourism now drive sentiment

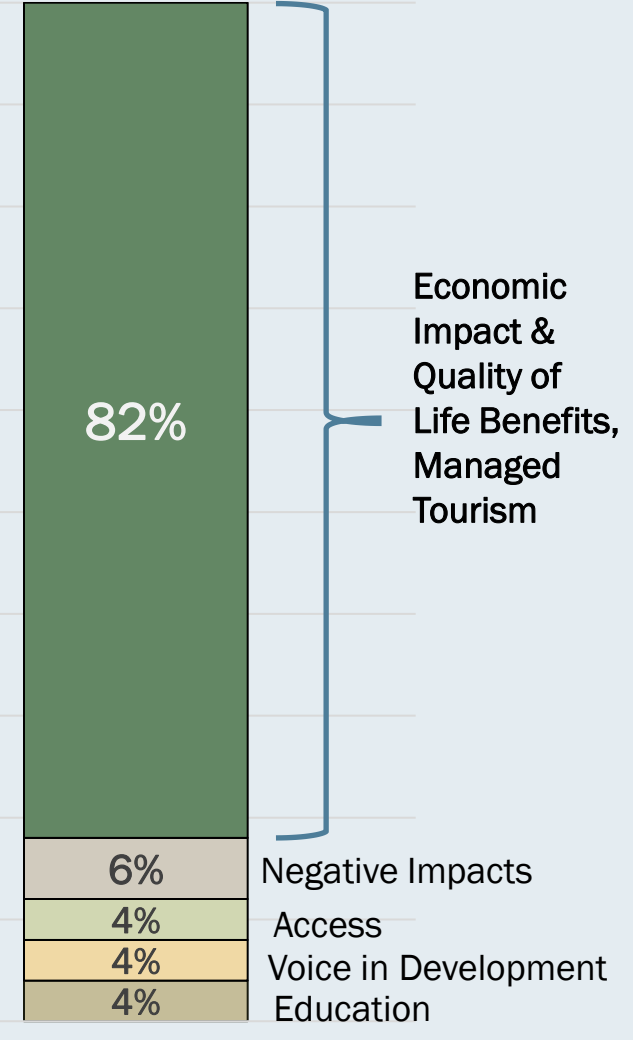
Drivers of Resident Sentiment



Fall 2019



Spring 2022



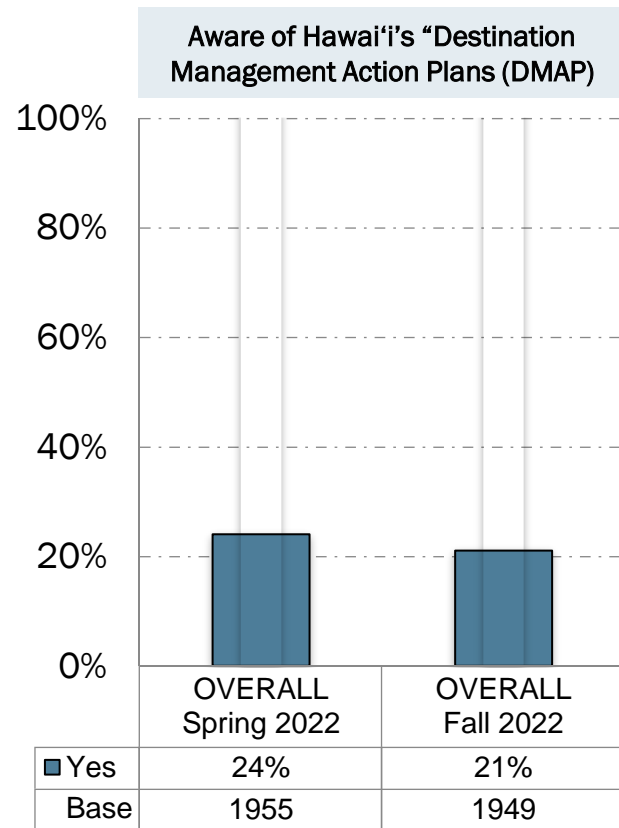
Fall 2022

Economic/Quality of Life Benefits/Managed Tourism Driver Details

Detailed Breakdown of Economic/Quality of Life Benefits and Managed Tourism Driver – Fall 2022

Attribute	Attribute Weights
Creates job opportunities for residents	11%
Supports local businesses	10%
Creates shopping, restaurants and entertainment opportunities for residents	10%
Supports other industries like agriculture	7%
Helps fund the stewardship of Hawaii's natural resources, parks and cultural sites	7%
Is an industry that enhances residents' quality of life	7%
Sponsors festivals, activities & sports events for residents & visitors	7%
Creates jobs opportunities with paths for advancement	6%
Should be actively encouraged on my island	6%
Contributes to the perpetuation of Native Hawaiian culture and language	4%
More effort is being made to balance economic benefits of tourism and quality of life for residents	4%
Tourism is being better managed on my island	3%

Awareness of Managed Tourism Plans



	Statewide	O'ahu	Hawai'i Island	Maui County	Kaua'i
Aware of Hawai'i's "Destination Management Action Plans (DMAP)"	21%	21%	20%	24%	22%

Mean Score	Aware of DMAP	Unaware of DMAP
<i>Tourism has brought more benefits than problems</i>	6.7	5.9
<i>Perceived impact of tourism on you and your family</i>	6.8	6.0
<i>Tourism is being better managed on my island</i>	6.3	5.2
<i>Tourism should be actively encouraged on my Island</i>	6.7	5.9
<i>More effort is being made to balance economic benefits of tourism and quality of life for residents</i>	6.7	5.5
<i>I have a voice in my island's tourism development decisions</i>	5.2	3.6

Awareness of DMAP, does impact tourism sentiment with those aware reporting higher positive sentiment, specifically that tourism is better managed and that more effort was being made to balance the industry's economic benefits with quality of life.

Q9. Have you ever heard of "Destination Management" or "Managed Tourism?"

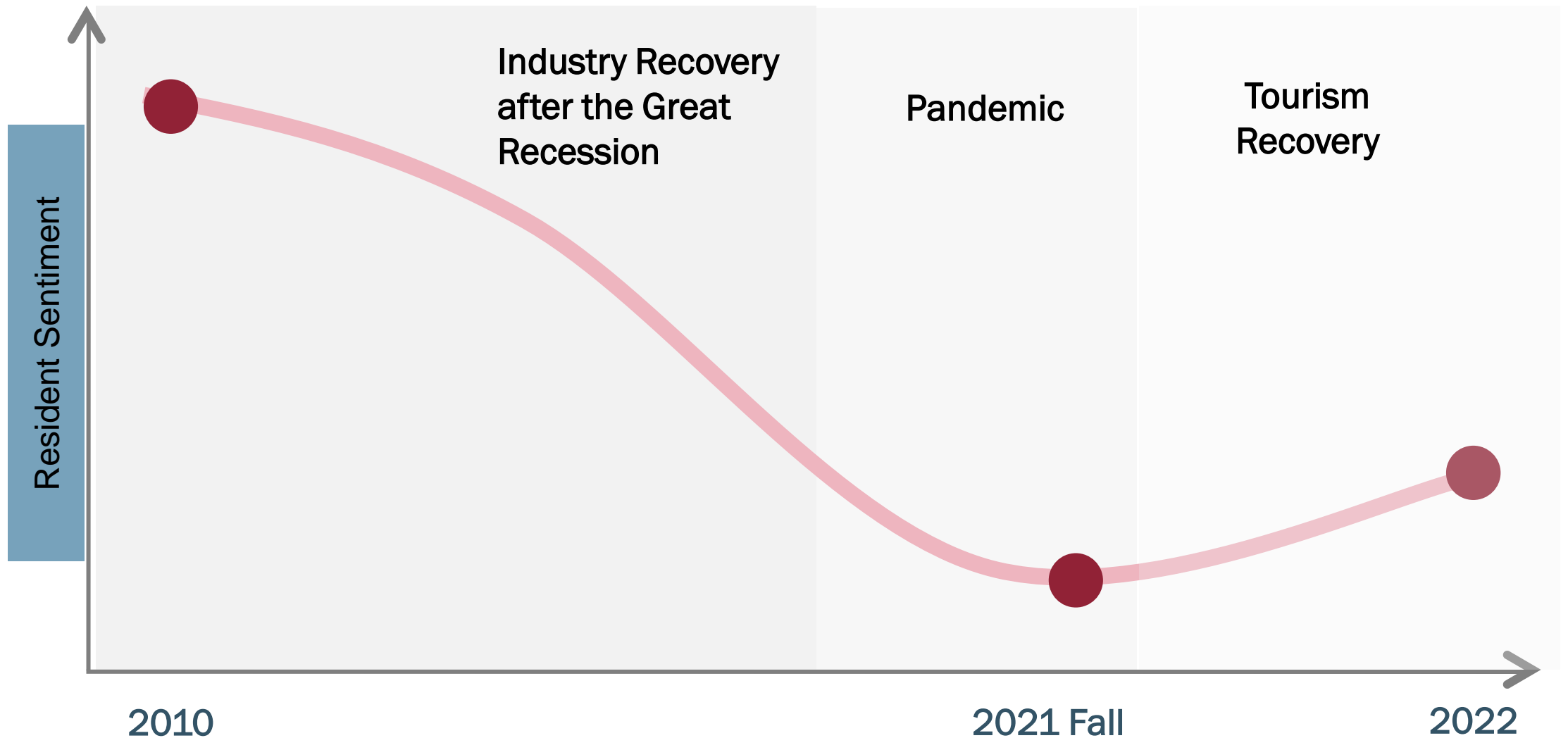
Q10. Have you heard of Hawai'i's "Destination Management Action Plans (DMAP)," which are the Hawai'i Tourism Authority's efforts to better manage tourism in our state?



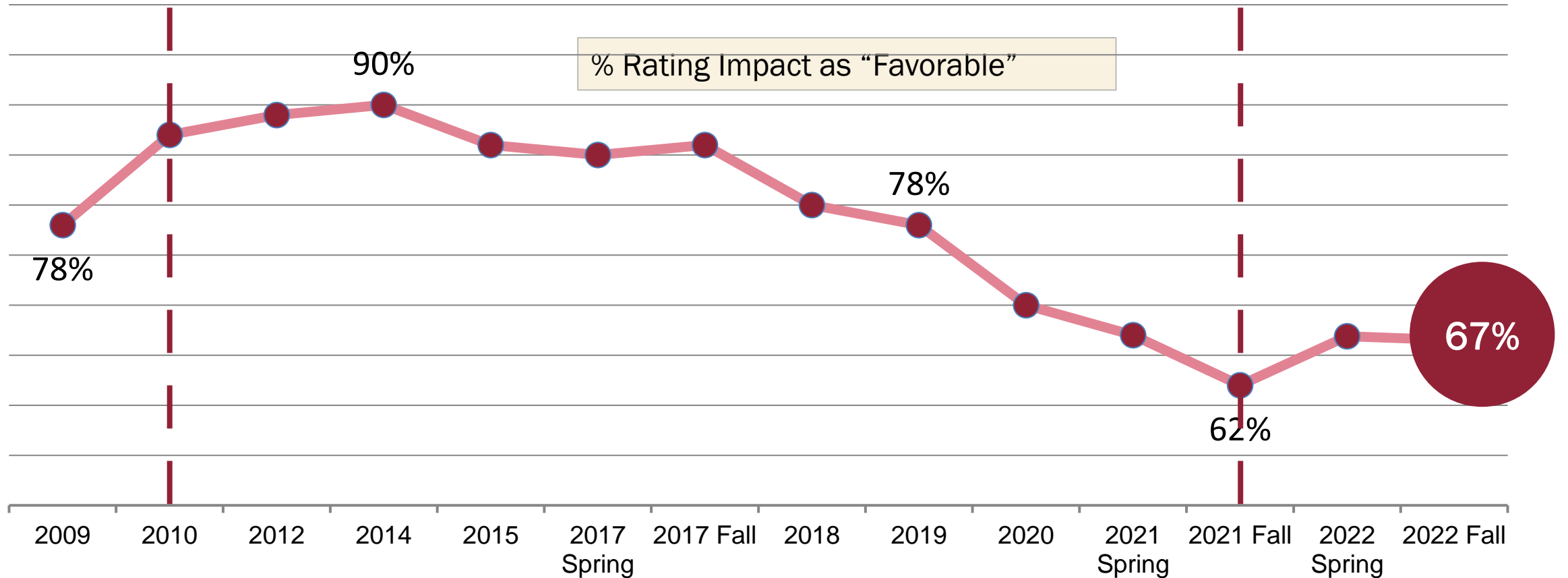
3

Recovery: As a result, Resident Sentiment is recovering after a prolonged downturn

Resident sentiment recovering after prolonged downturn



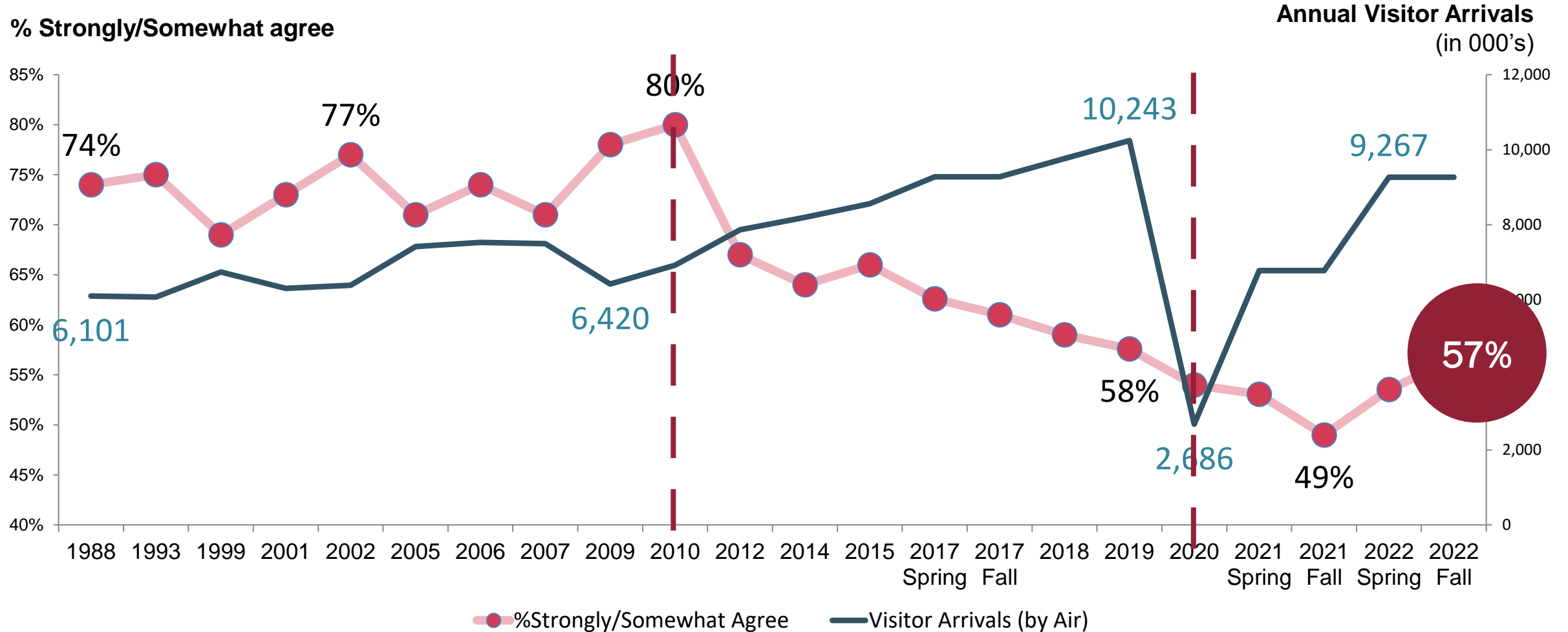
Favorable Views of Hawai'i Tourism on the mend



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.

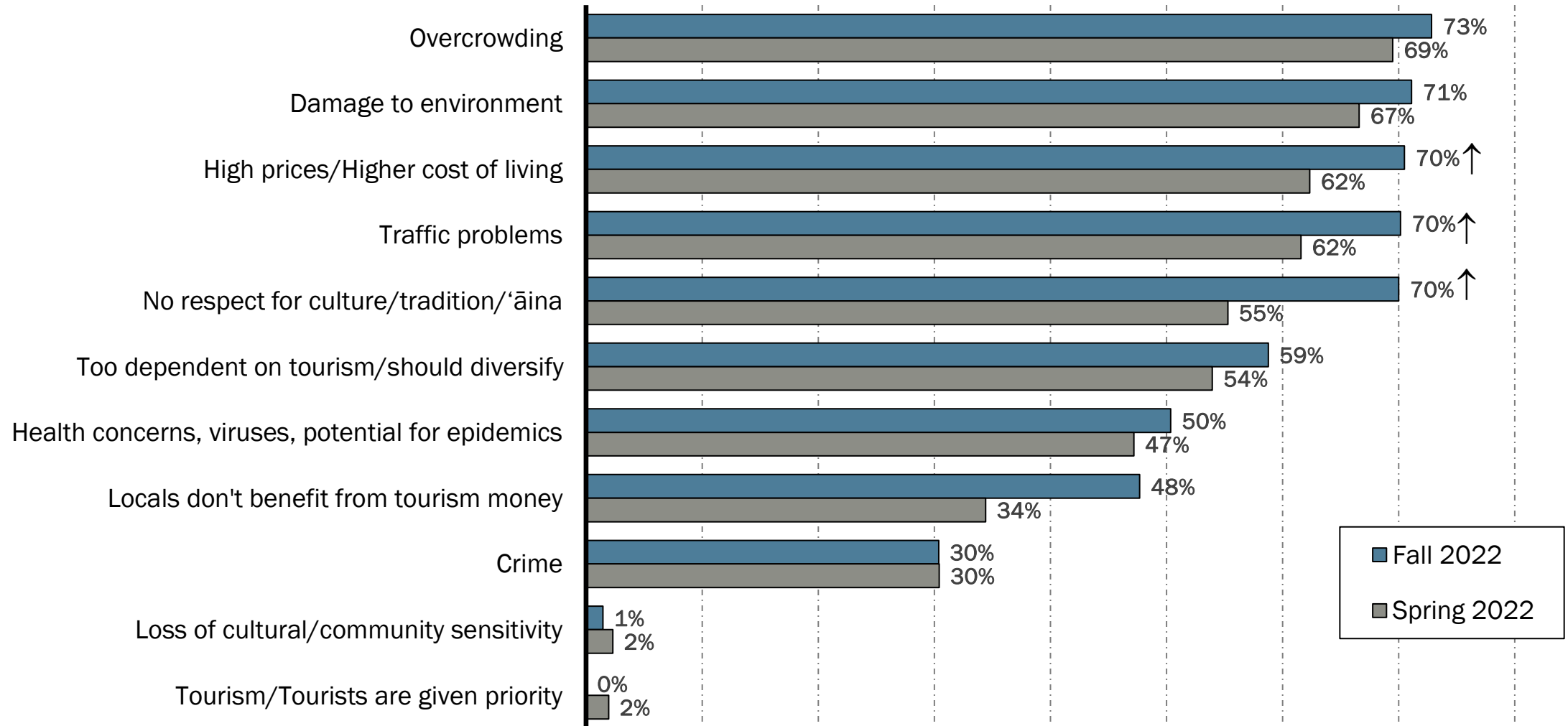
“Tourism has brought more benefits than problems” on the rise



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.

Opportunities for destination management in Hawai'i (Spring-Fall 2022)

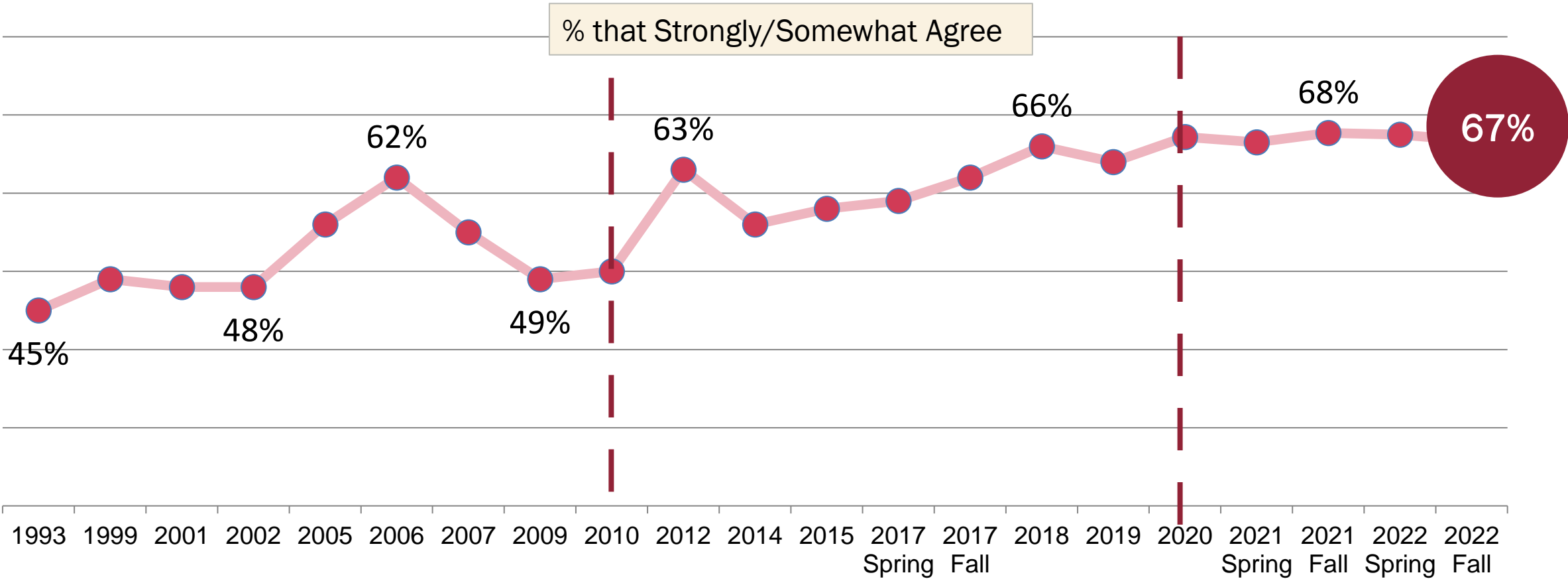
(According to residents saying Hawai'i tourism creates more **problems** than benefits)



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

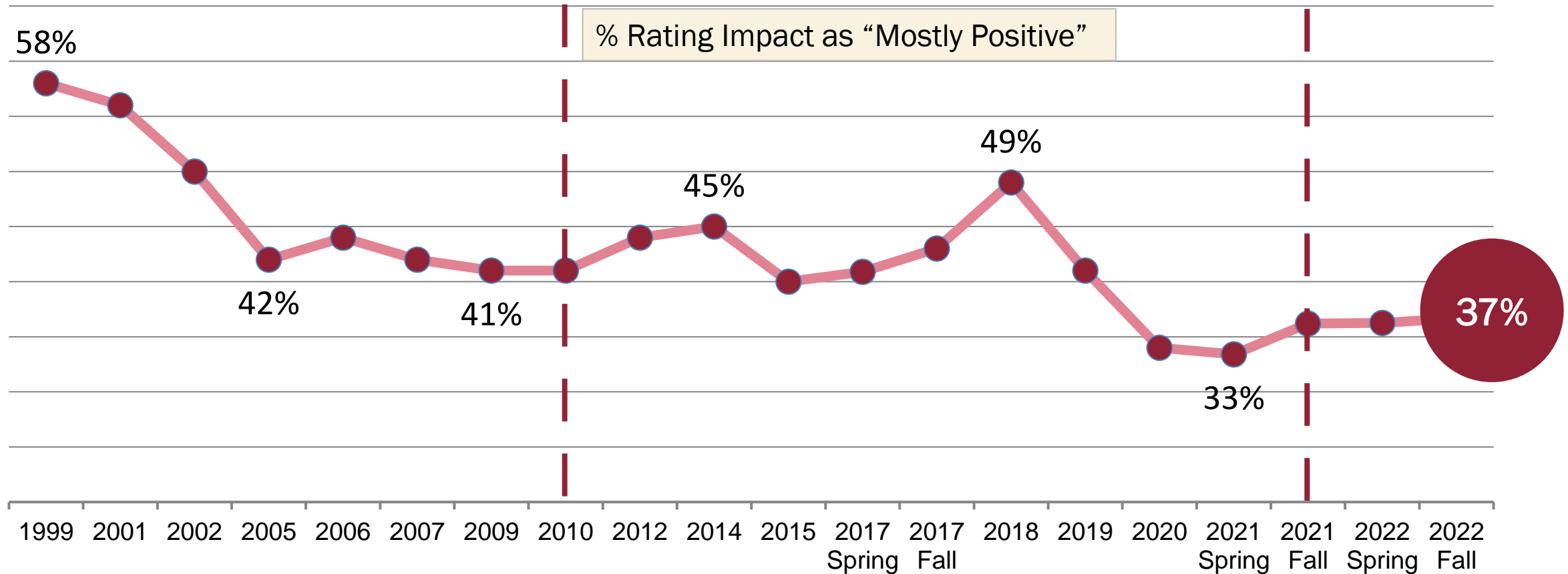
Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

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



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.

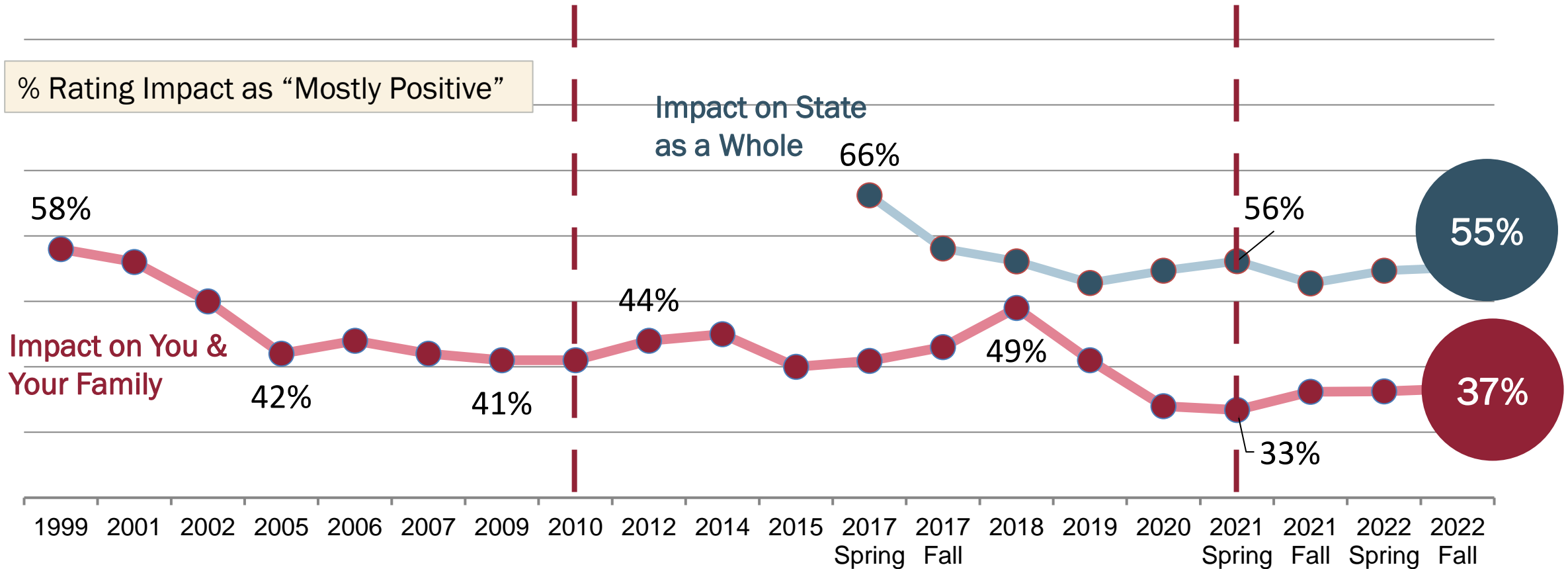
Mostly Positive *“Impact of Tourism on You & Your Family”* improving



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?

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

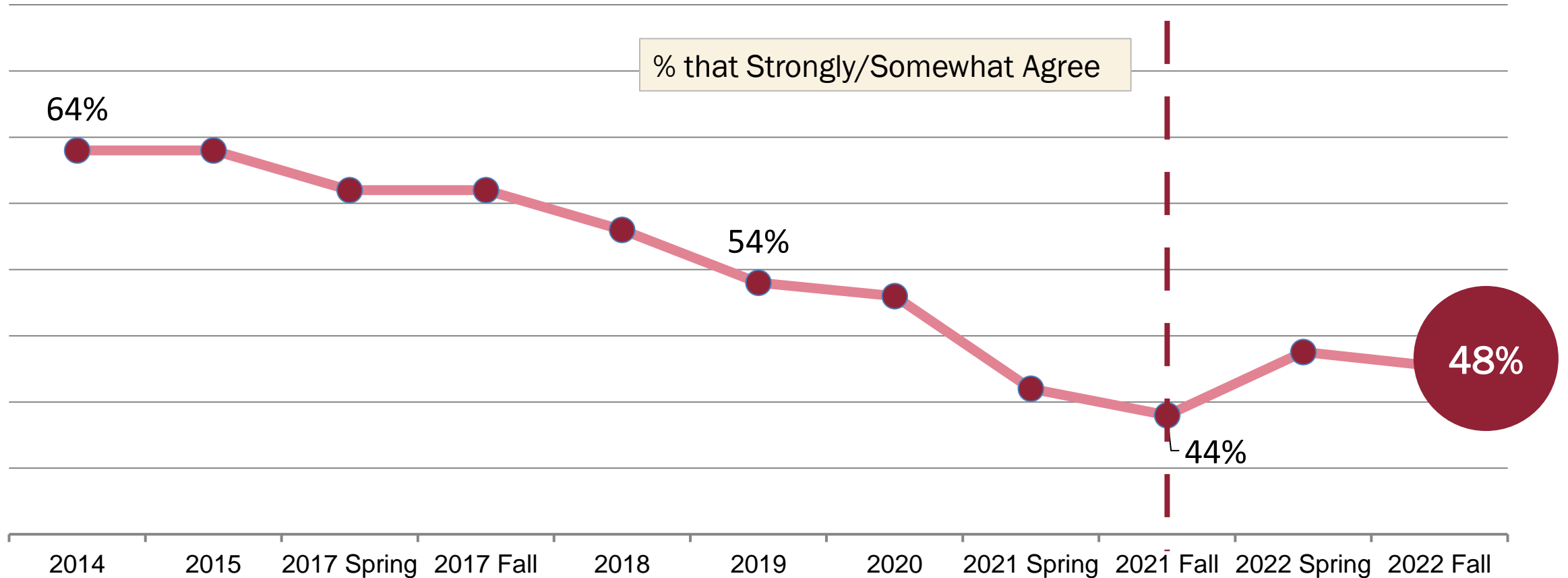
Mostly Positive “Impact of Tourism on the State as a Whole” steady



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?

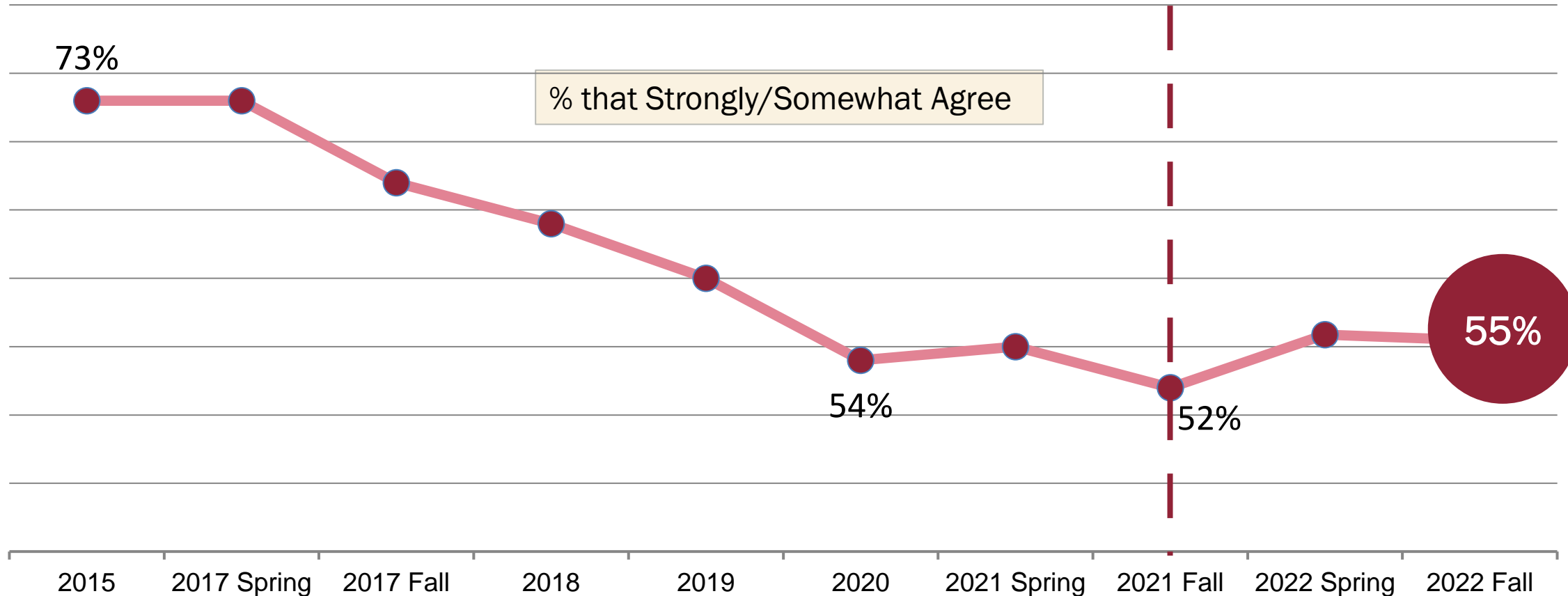
Note: % saying Tourism has been “mostly positive” for you and your family defined as Rating of 7 to 10 on 10-point scale.

“Tourism enhances residents’ quality of life” on the mend



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.

“Tourism should be actively encouraged on my island” improving



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.



Mahalo from the Omnitrak Group