

Resident Sentiment Survey Fall 2021 Highlights



Prepared for the:
State Department of Business, Economic Development & Tourism: Project #5792
January 2022

Fielded: November 8, 2021 through January 3, 2022



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What's the Big Idea?



B I G I D E A

1

The Great Reset: Awareness of HTA Tourism Management efforts is rising, setting the stage for results.

2

The Current Setting: Resident sentiment weakens slightly in Fall 2021, though residents say tourism is worth the issues associated with it.

3

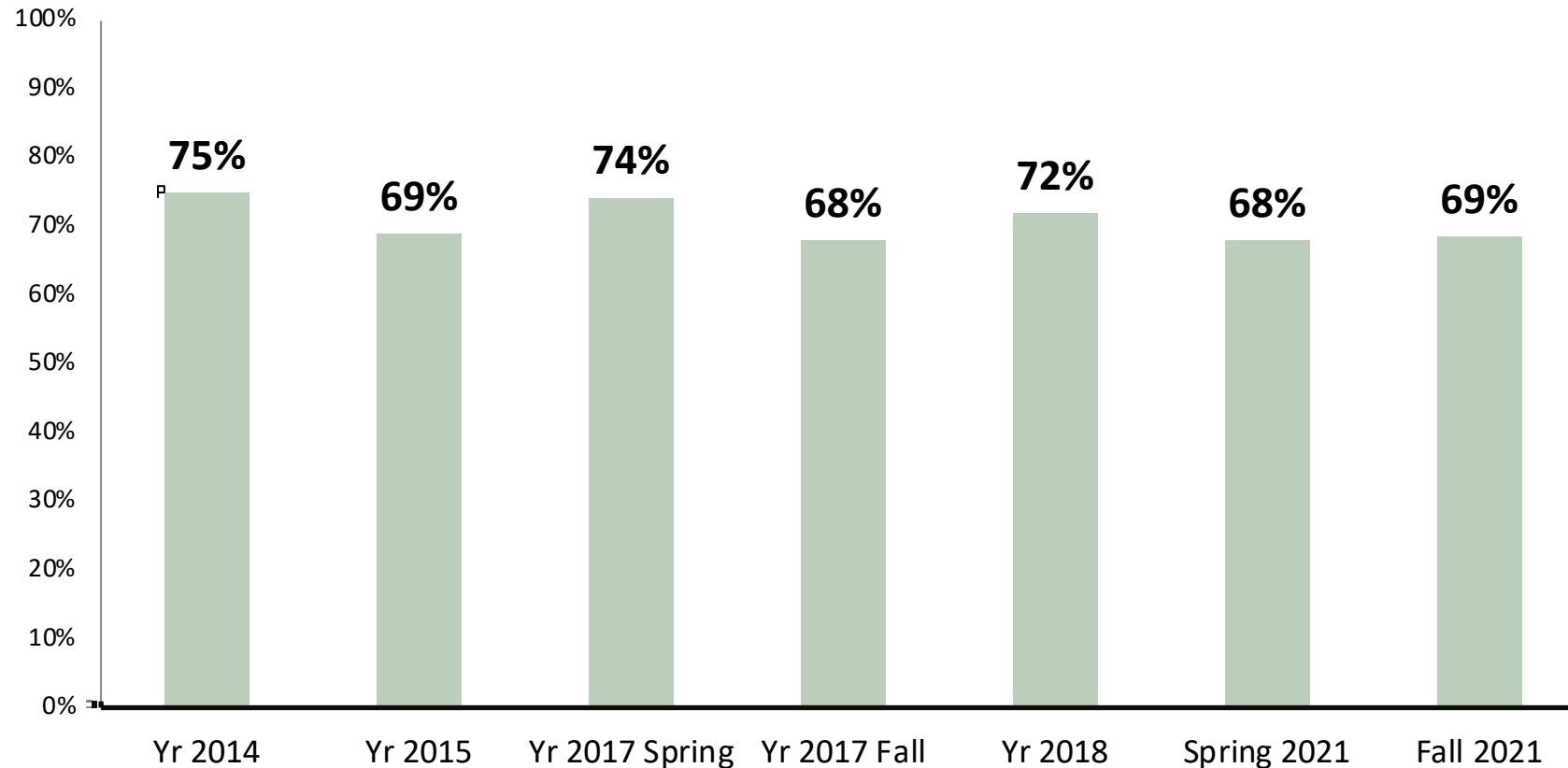
The Next Chapter: As awareness of Managed Tourism efforts rise, they are gaining support and influence in improving resident sentiment.



1

The Great Reset: Awareness of HTA Tourism Management efforts is rising, setting the stage for results.

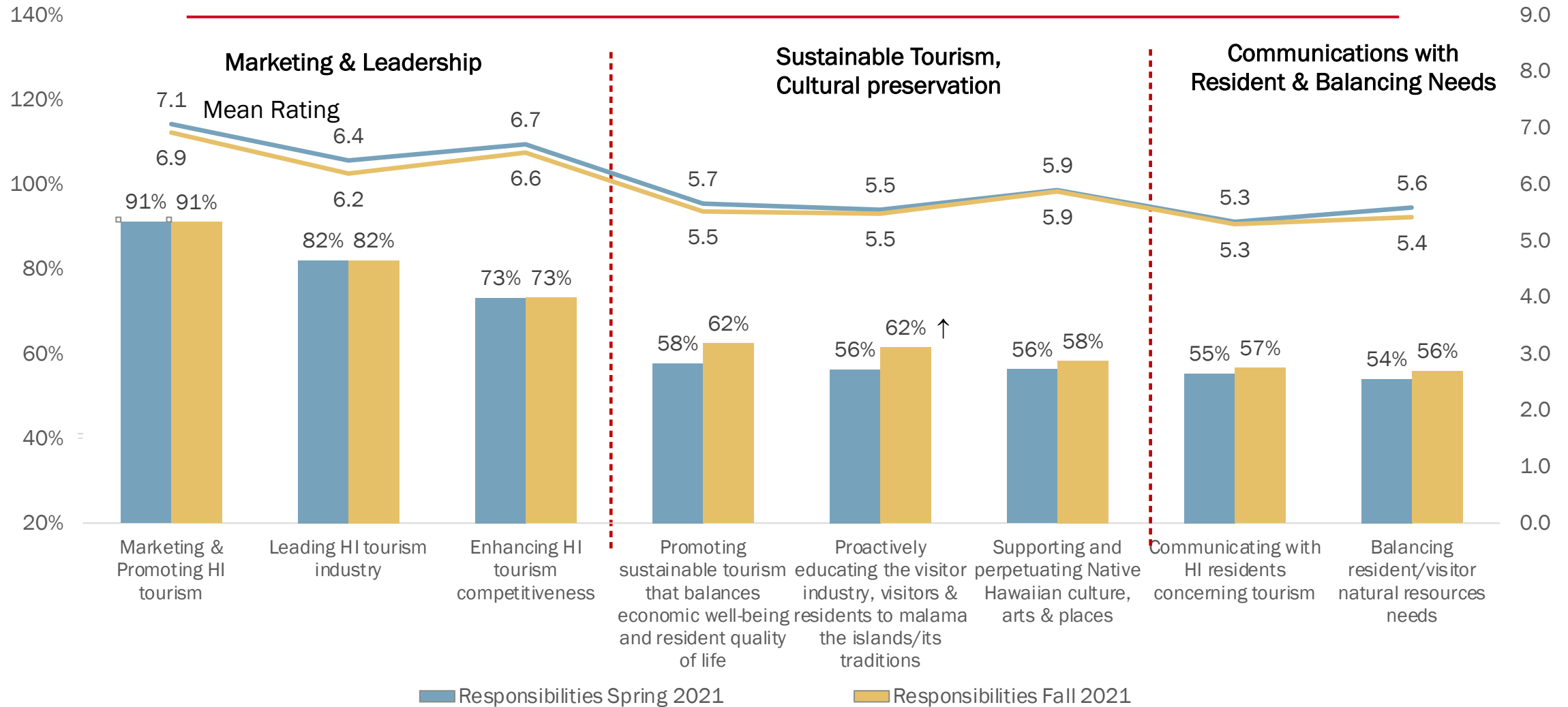
Hawai'i Tourism Authority Aided Name Awareness holds steady



Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority?

Resident awareness of HTA Tourism Management roles rise

(i.e., satisfaction measured among residents aware that HTA is responsible for each area)



Q9a. Prior to doing this survey, were you aware that the Hawai'i Tourism Authority is responsible for?

Q9b. Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority is doing an Excellent job and 1 means you think the Hawai'i Tourism Authority is doing a Poor job, how would you rate the job the HTA is doing in.....?



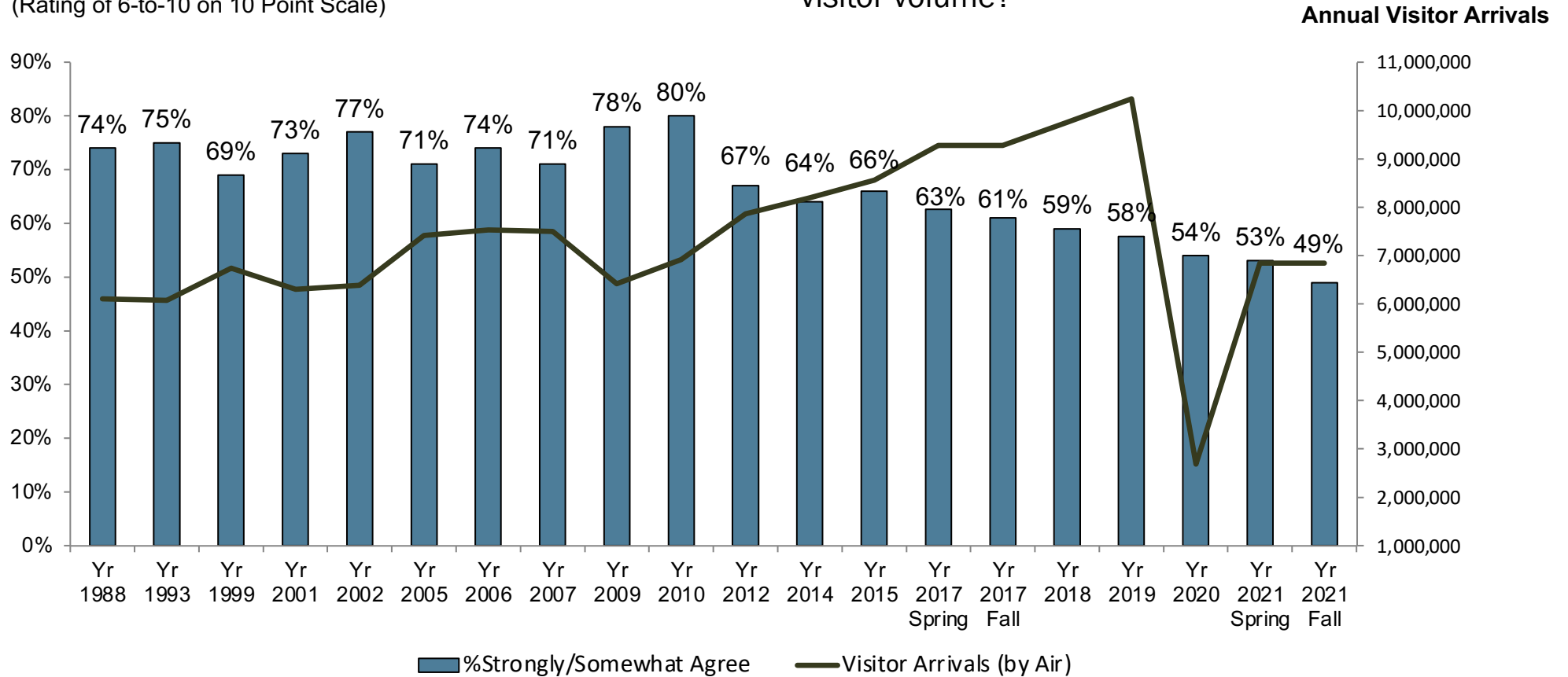
2

The Current Setting: Resident sentiment weakens slightly in Fall 2021, though residents say tourism is worth the issues associated with it.

“Tourism has brought more benefits than problems” continues downward

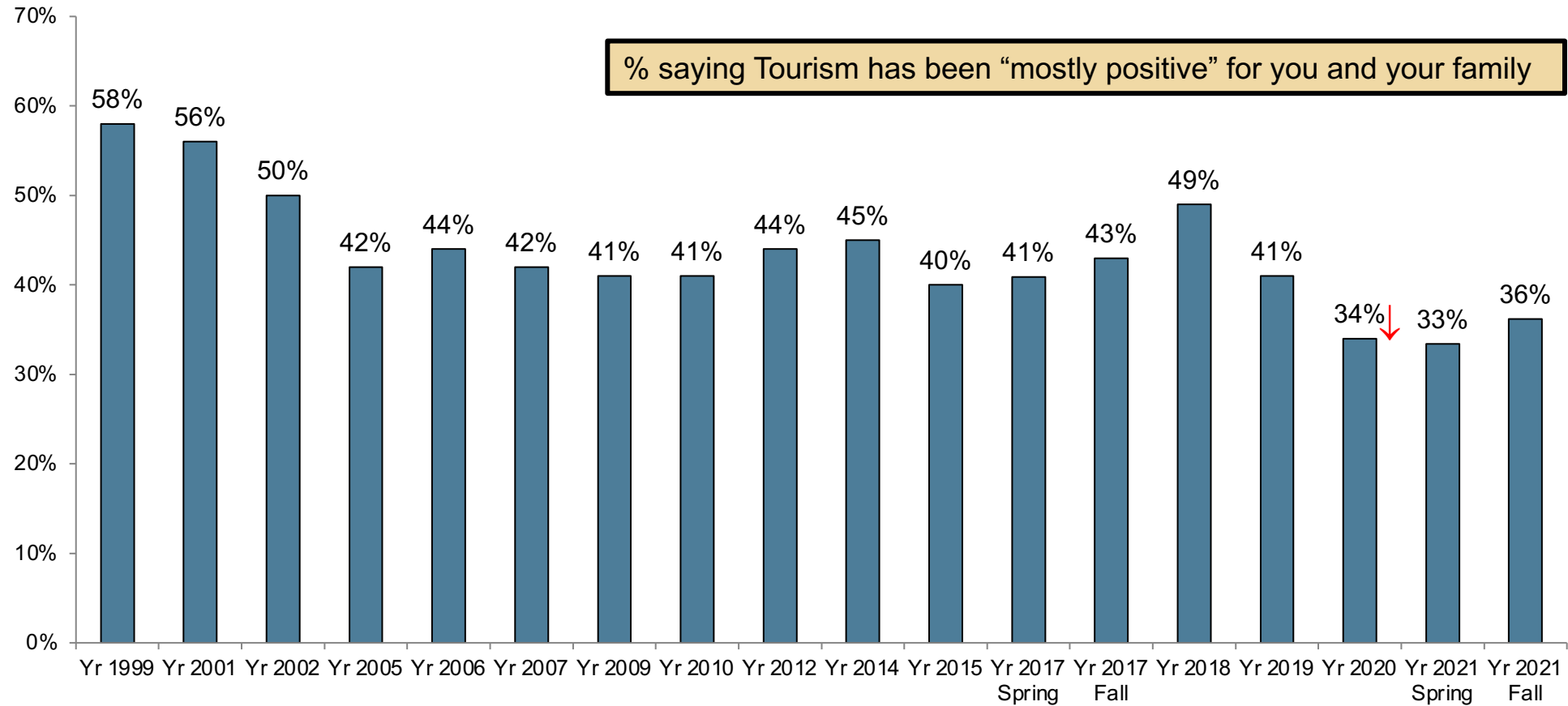
% strongly/ somewhat agree tourism has brought more benefits than problems
(Rating of 6-to-10 on 10 Point Scale)

- Tourism recovery concerns?
- Longer-term issues beyond visitor volume?



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.

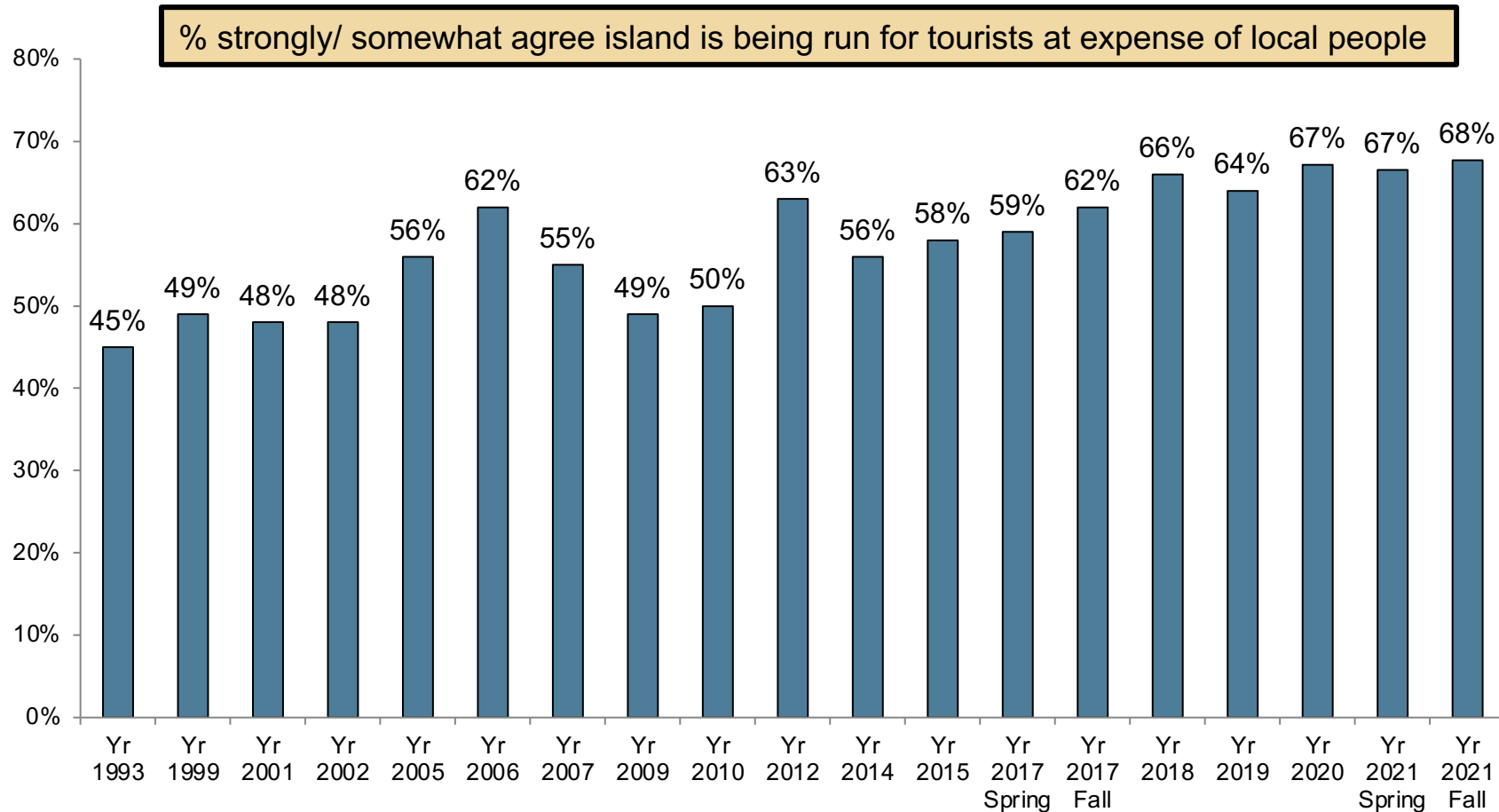
“Impact of Tourism on You & Your Family” strengthens



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” holds relatively steady

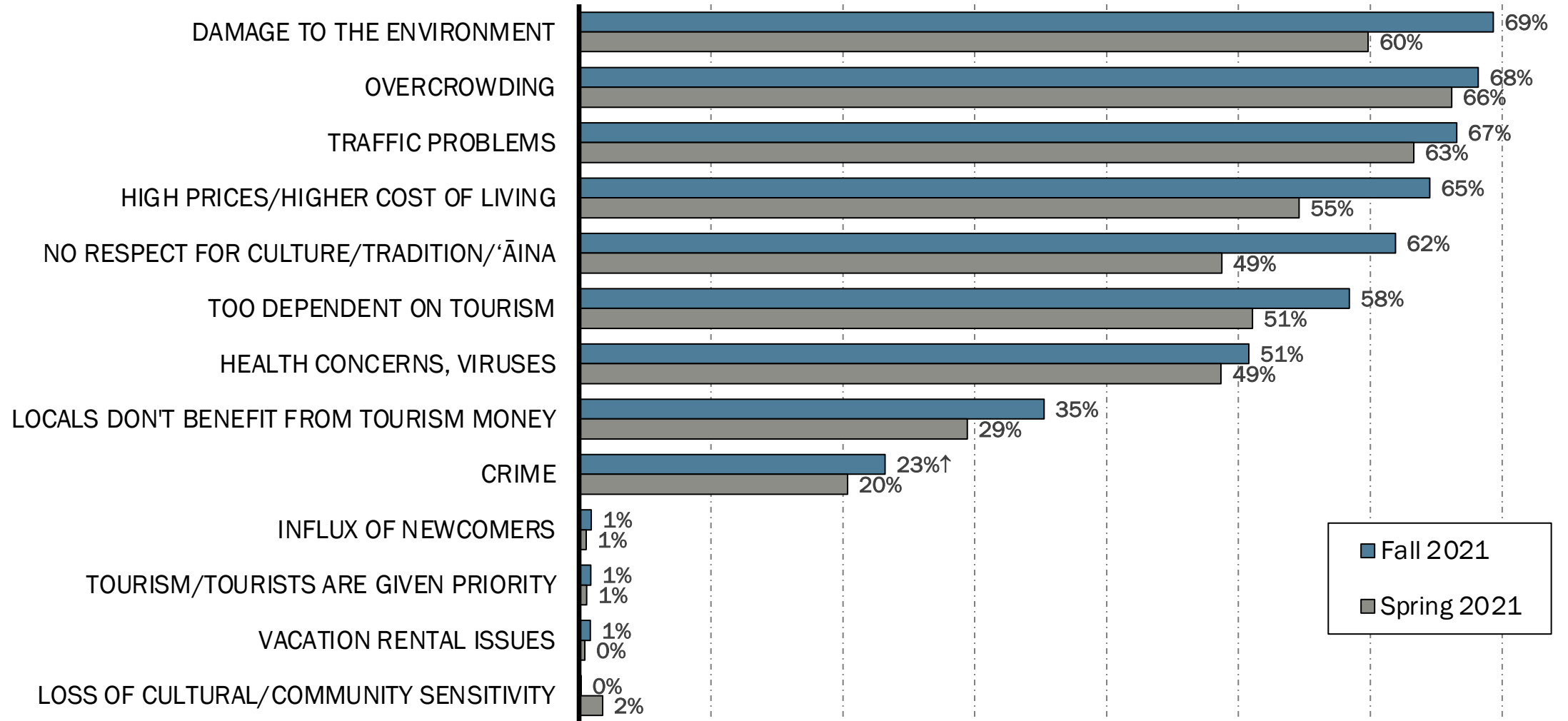


In order to track the data (change in rating scale) from 2009 on a rating of 6-10 was used to approximate the percent that felt positively about this statement.

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...?

Tourism in Hawai'i creates...

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



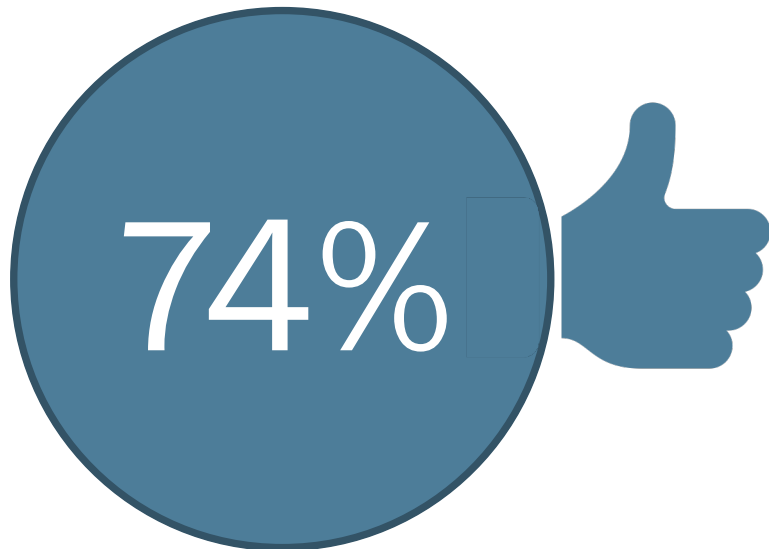
Base: Spring 2021 (808), Fall 2021 (973)

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

However, residents still believe tourism is worth the issues associated with the industry ...

Fall 2021 Resident Sentiment Survey Research Findings

Tourism is worth the issues associated with the industry



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?

Fall 2021 Resident Sentiment Focus Group Findings

“I think tourism is a necessary evil, but I wish that it was controlled more, especially at this time.” (Kaua‘i Resident)

“I’d prefer if we could have less of it, but without any kind of replacement for our economy, it kind of is what it is. (O‘ahu Resident)

“I think ... tourism is the primary thing that’s required for people to financially stay viable, to stay alive.” (Kaua‘i Resident)



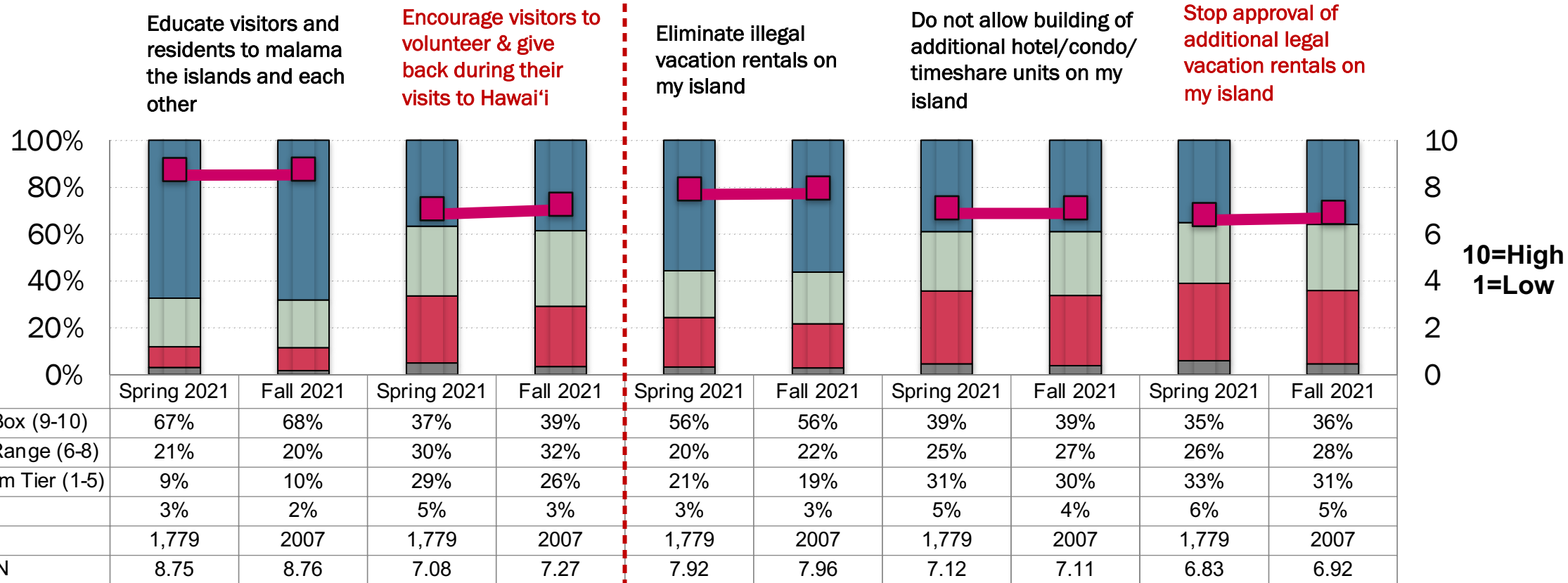
3

The Next Chapter: As awareness of Managed Tourism efforts rise, they are gaining support and influence in improving resident sentiment.

Resident support for “volun-tourism” & halting additional legal vacation rentals inches upwards. Support for other strategies remain strong.

Regenerative

Accommodations



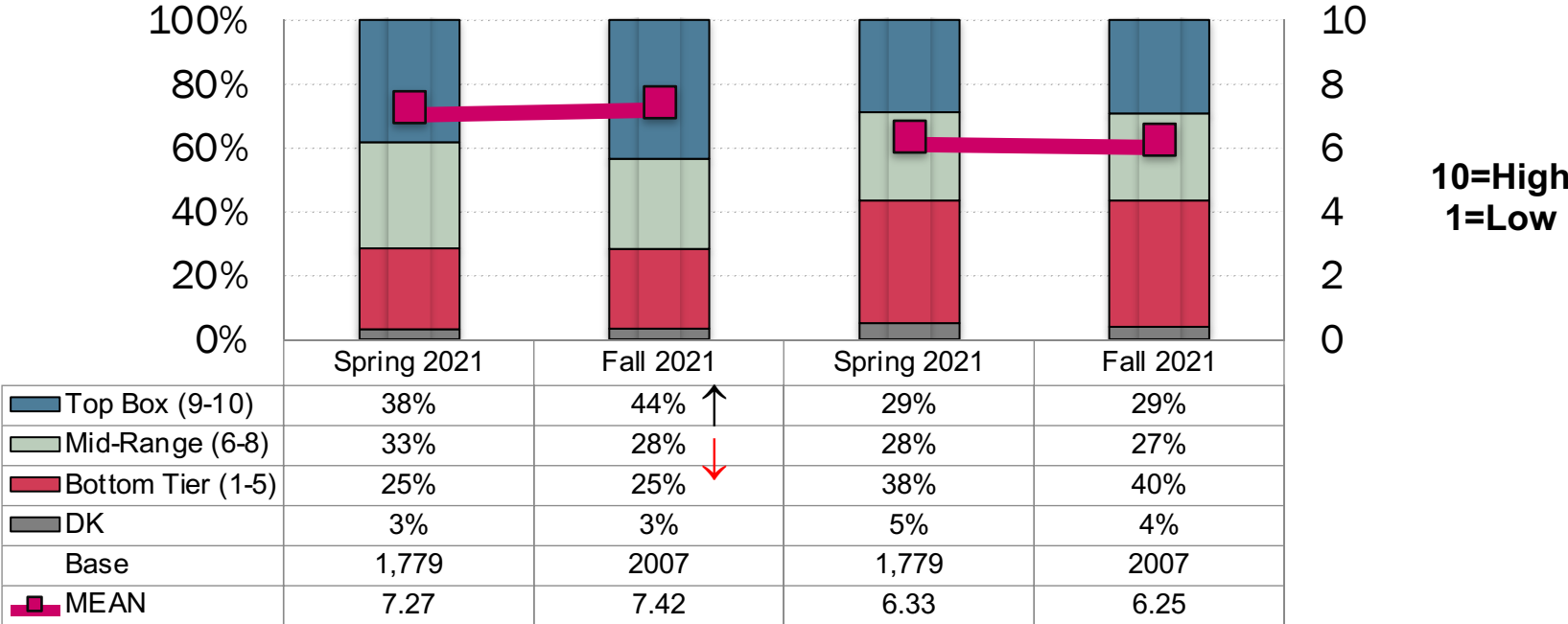
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

Resident support for visitor access fees inches upwards.

Access

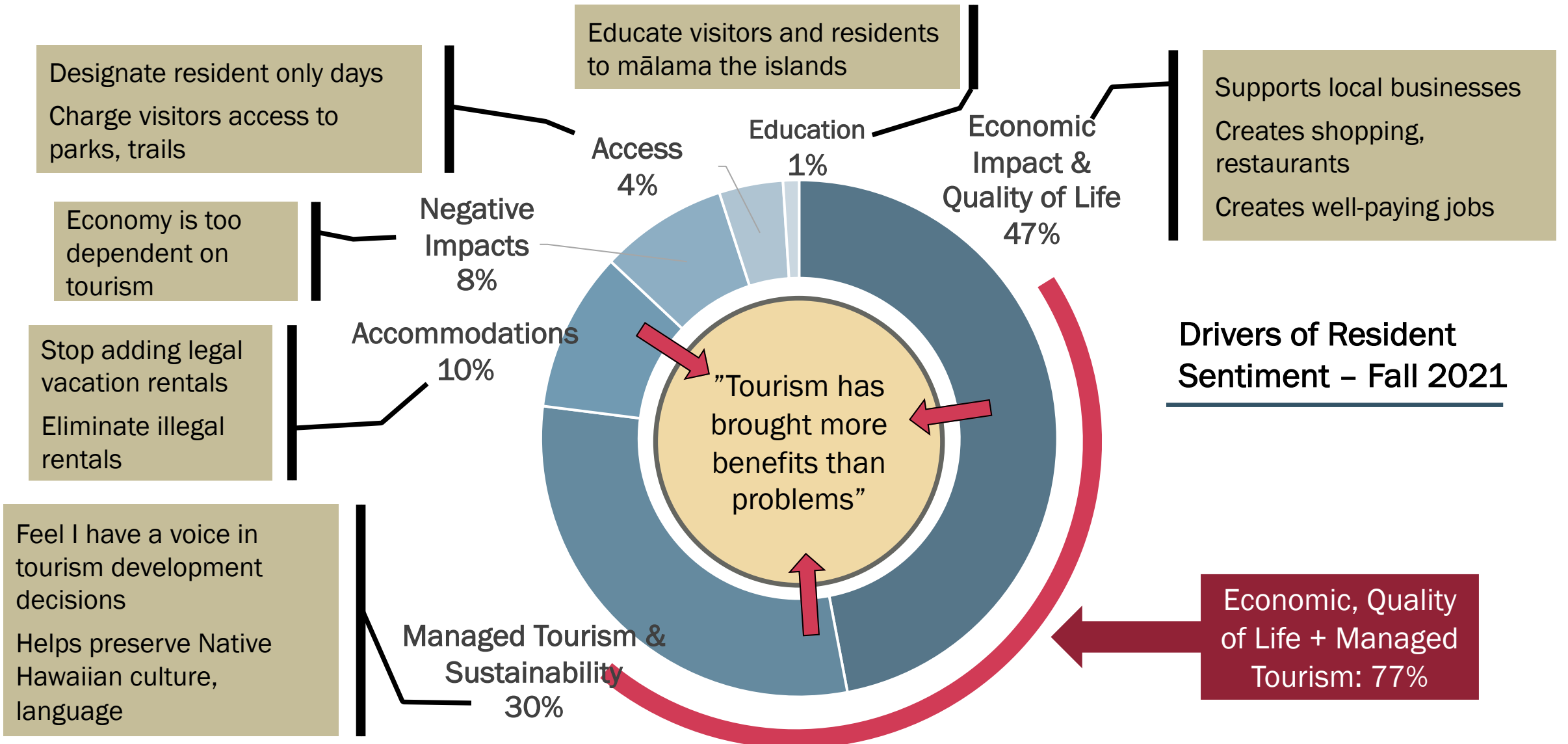
Charge visitor access fees to state parks and trails

Designate resident-only days of the week at some state parks, beaches and trails

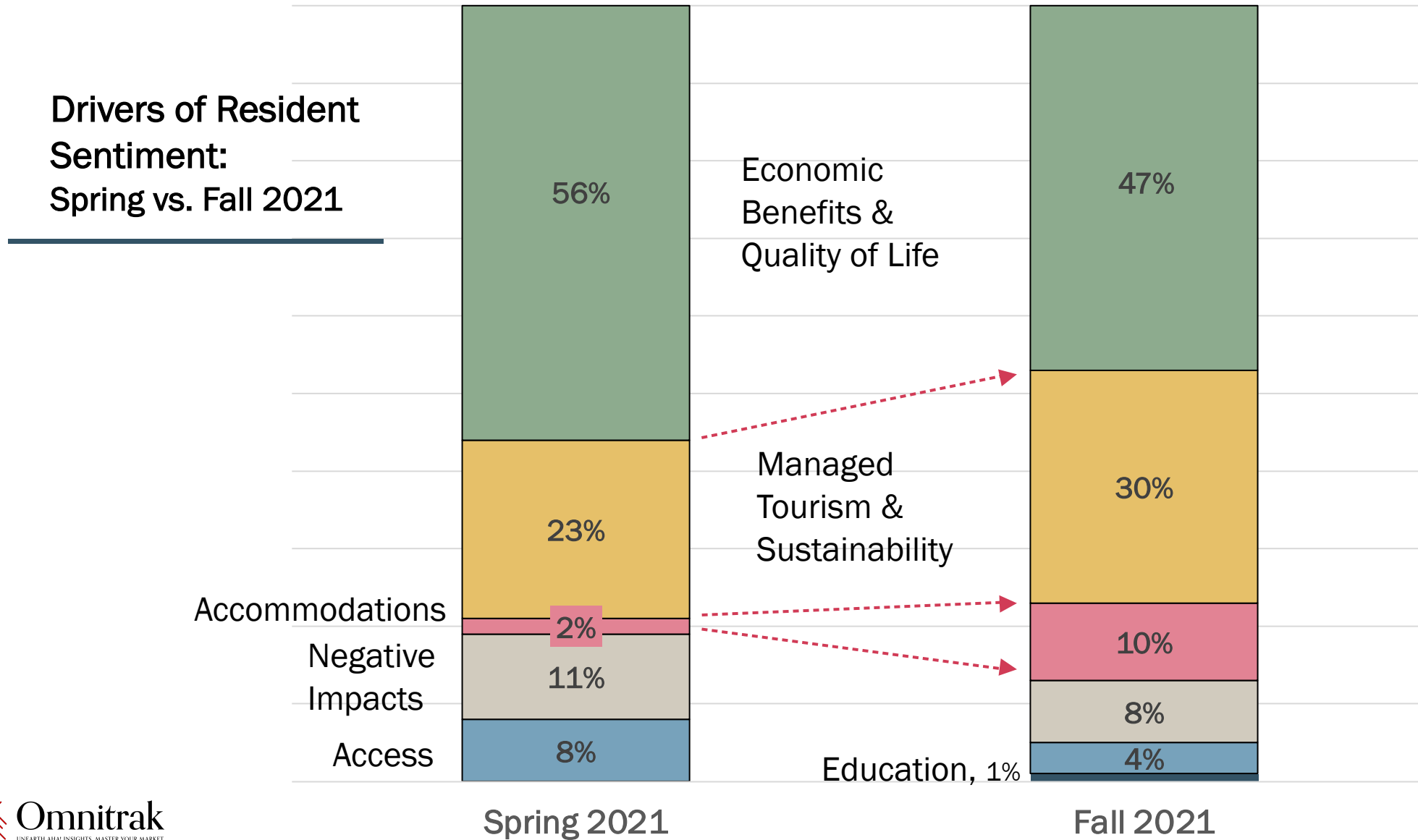


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state _____ to help better manage tourism?

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



Managed Tourism & Sustainability Rise in Importance





Mahalo from the Omnitrak Group



Appendices

Background Information

Tourism Management Ratings

Overview of Fall 2021 Indicators

Is Tourism Worth the Issues?

Problems Created by Tourism



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 18 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 $n = 2,007$ respondents as follows:

- O'ahu: 853
- Hawai'i Island: 458
- Maui County: 419
- Kaua'i: 277

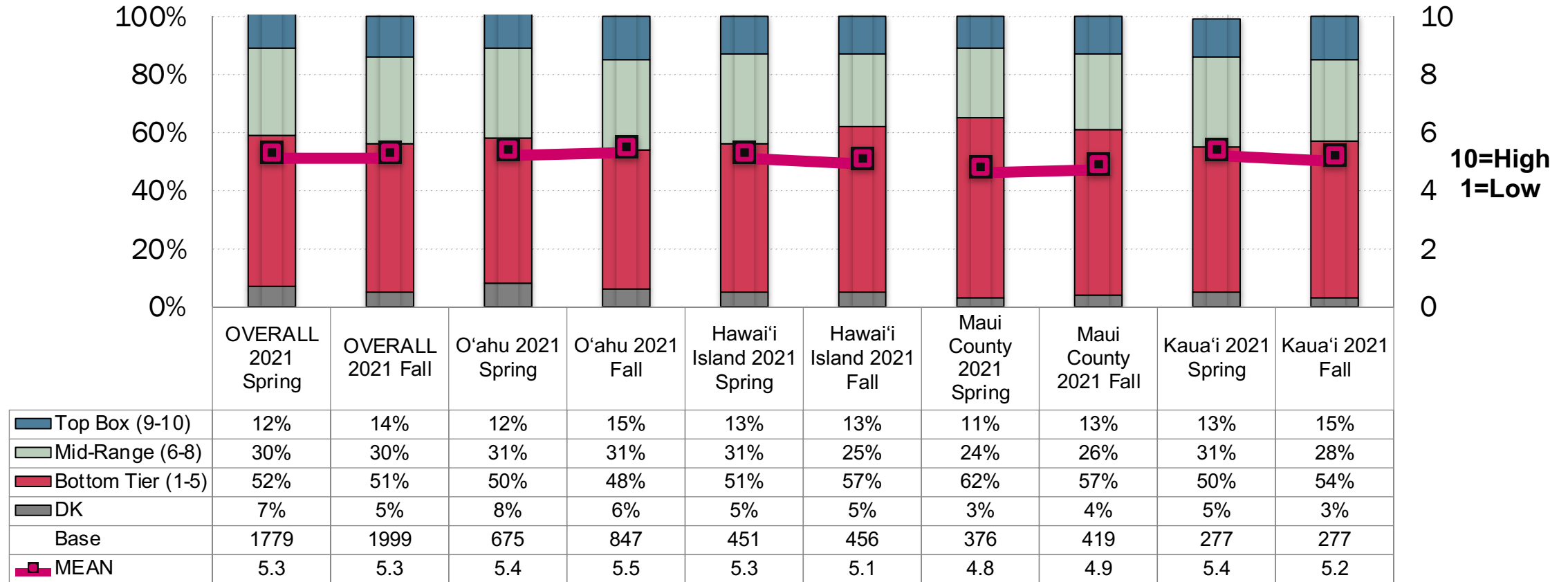
Methodology

- A mixed methodology was used for this survey, including a combination of Computer Assisted Telephone Interview (CATI, 36%) and online surveys (64%).
- All calls were placed from OmniTrak's continuously quality-controlled calling center in the Davies Pacific Center building in Downtown Honolulu.
- Field Dates:
November 8, 2021 through January 3, 2022



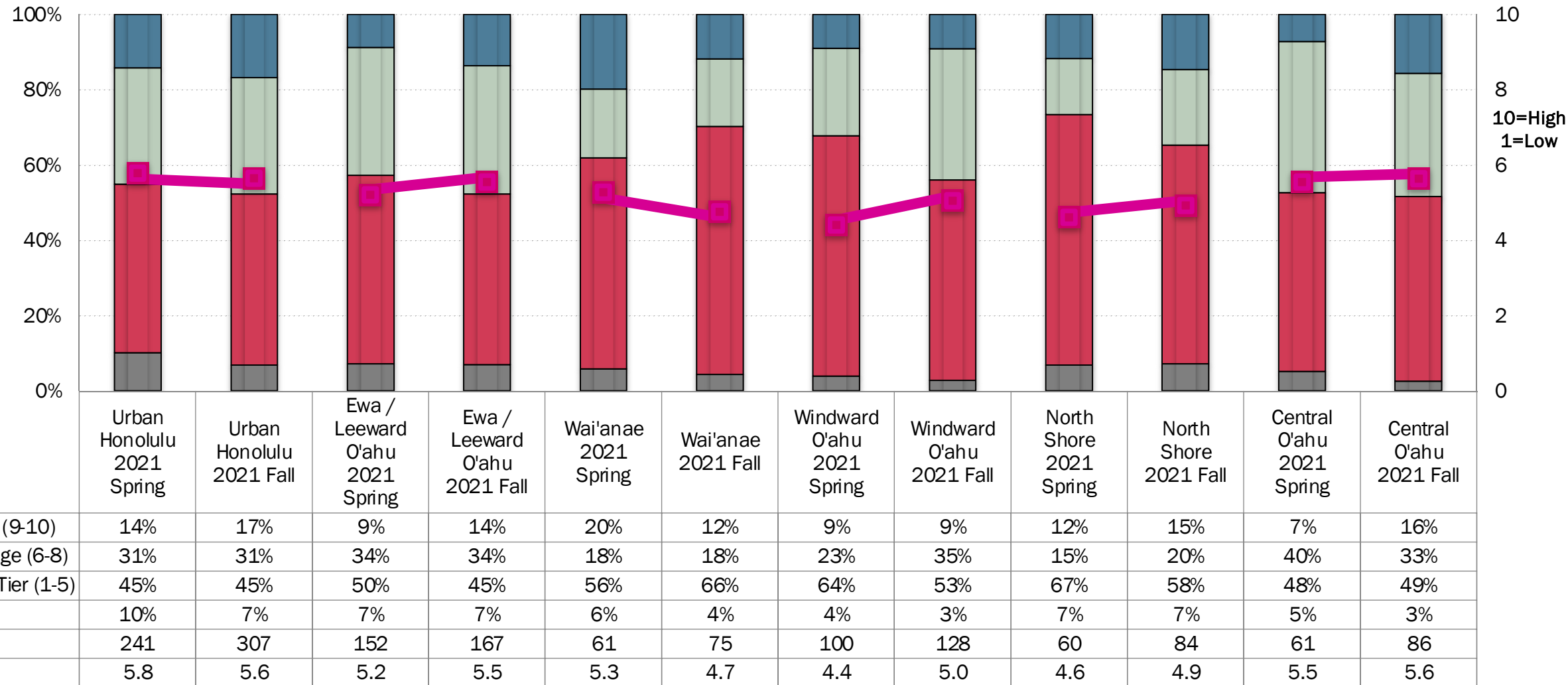
Appendix B: Resident Ratings of Tourism Management Efforts & Strategies

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



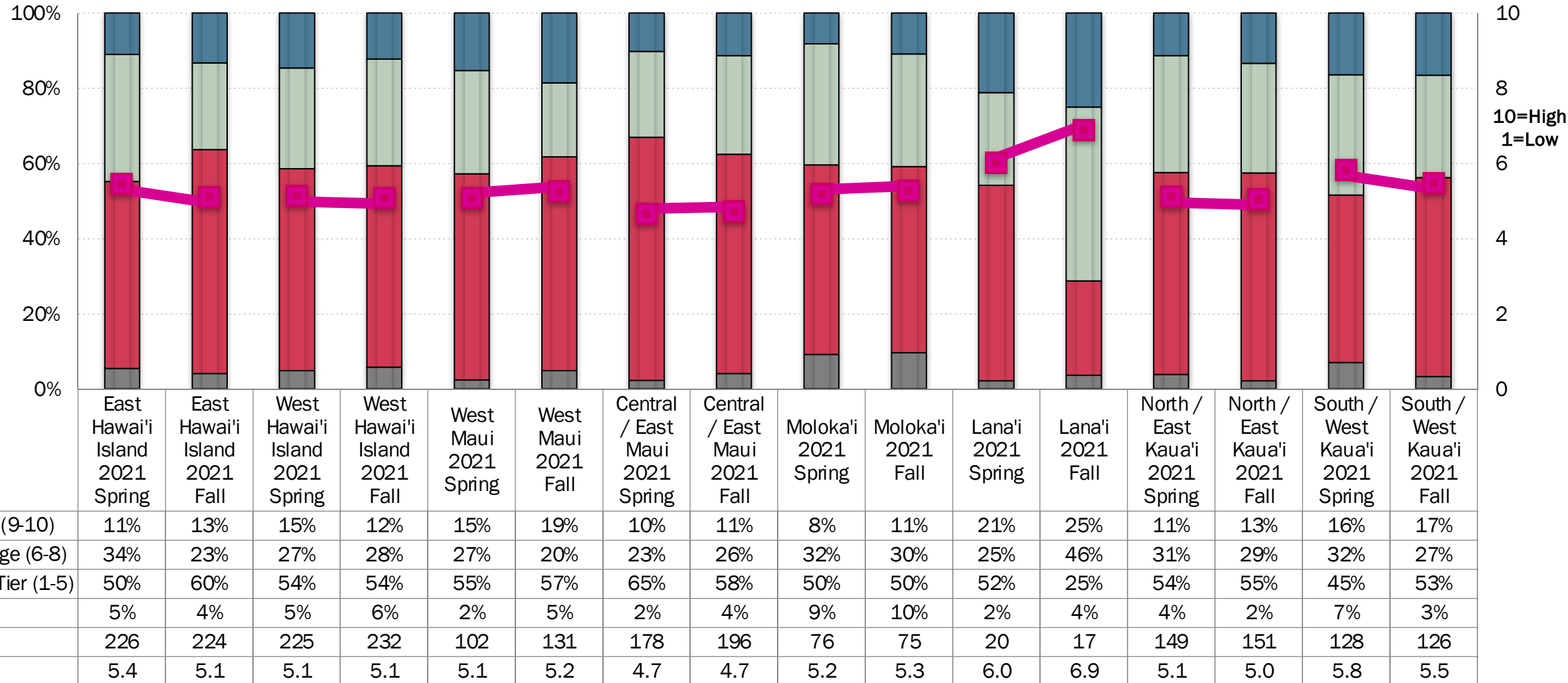
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

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



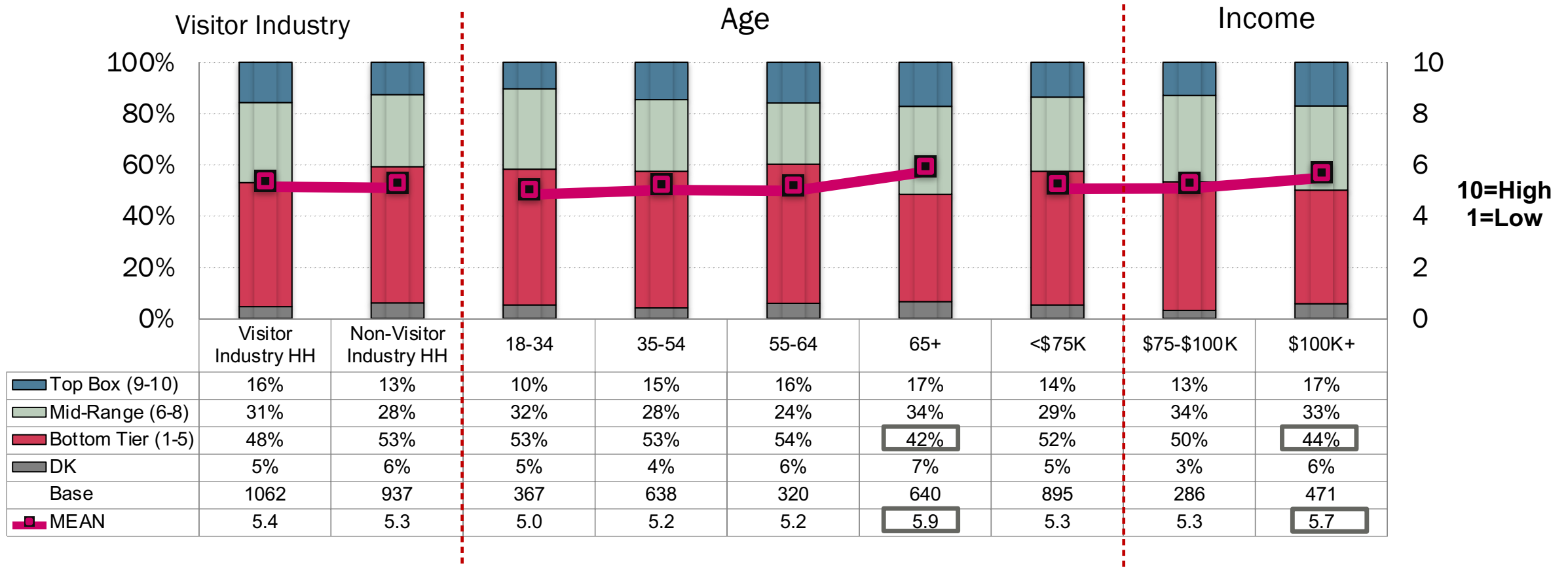
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” - *By Area* (Continued)



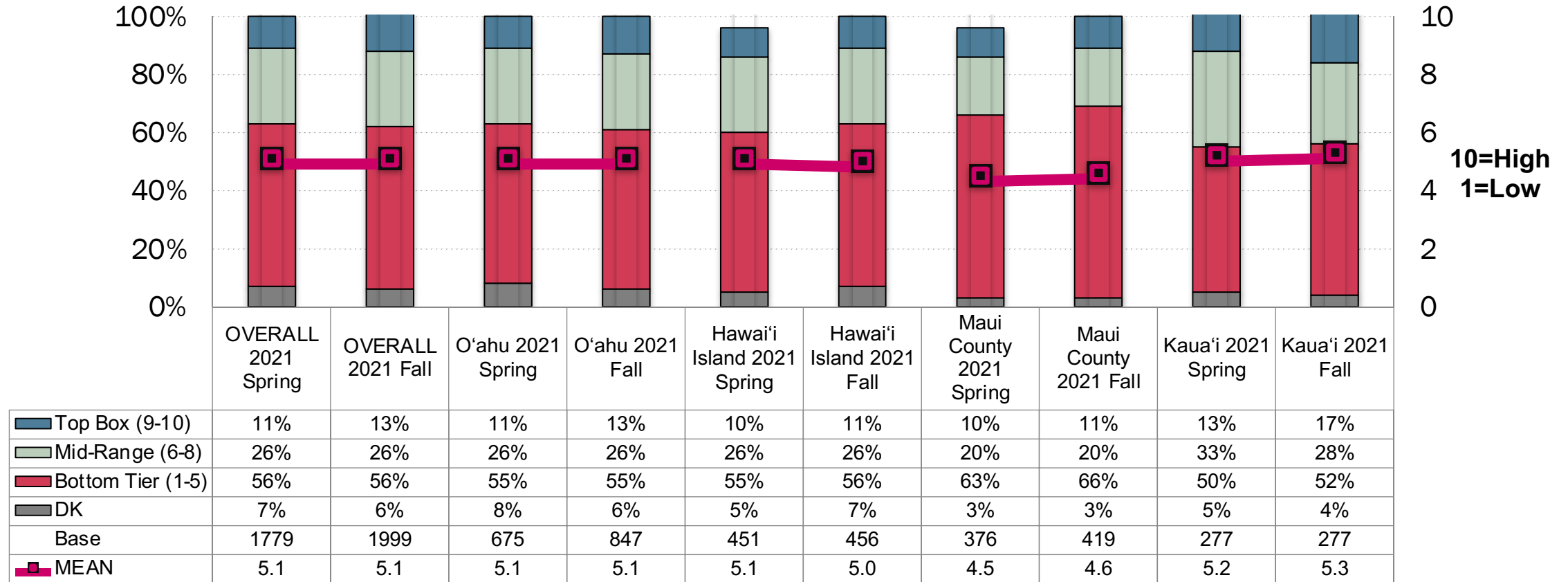
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“I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents” – *By Demographics*



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.

“I feel like tourism is being better managed on my island” – *By Island*



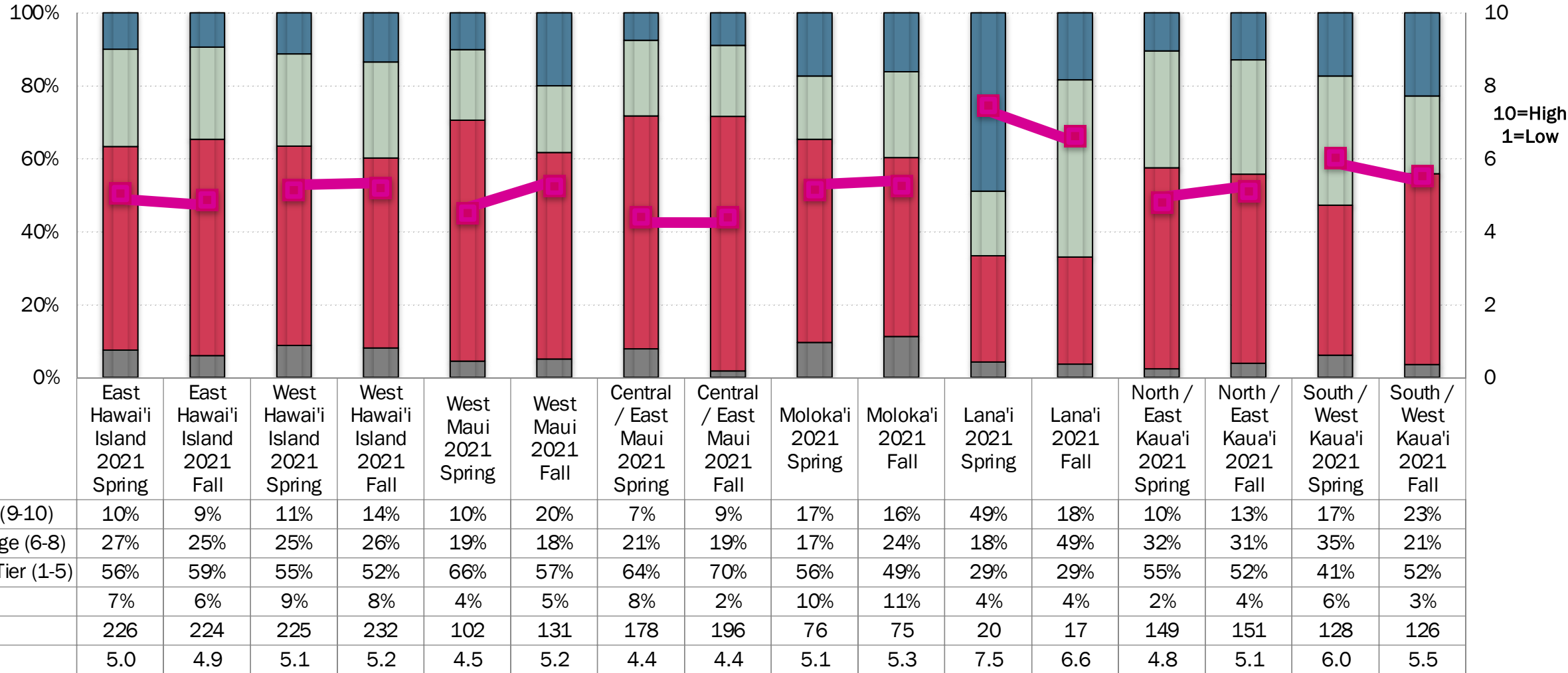
“I feel like tourism is being better managed on my island” - *By Area*



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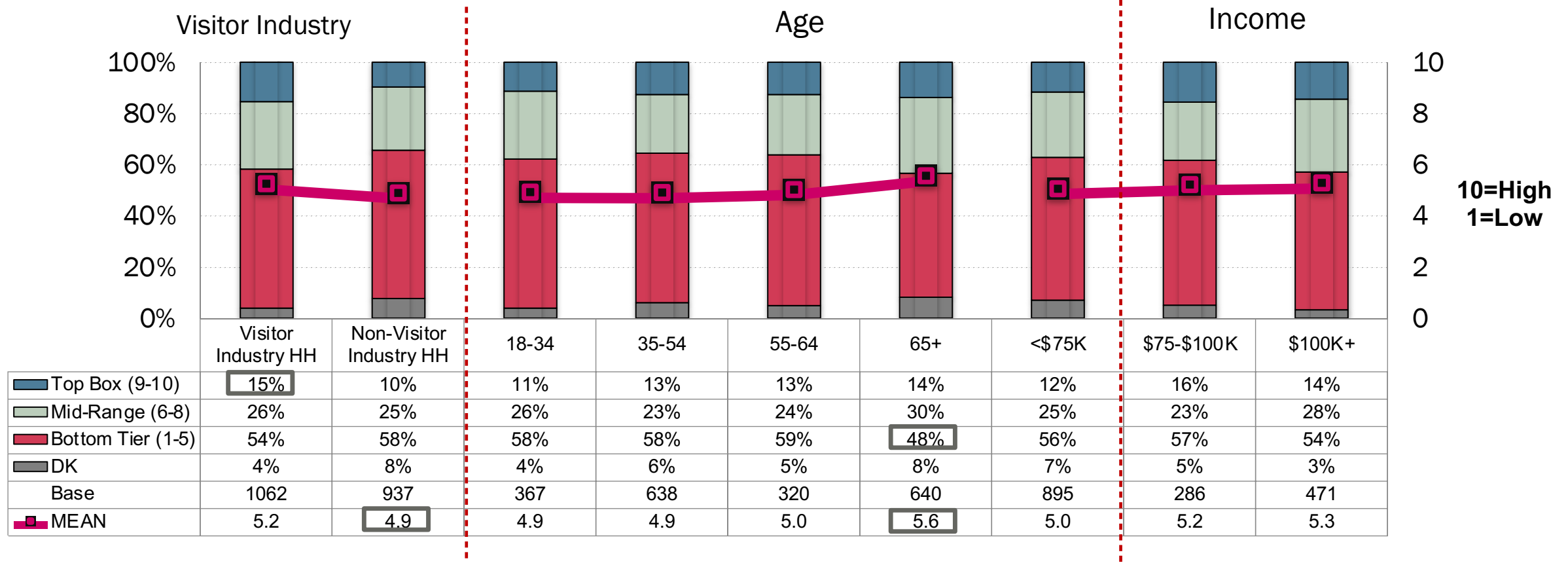
“I feel like tourism is being better managed on my island” - *By Area*

(Continued)



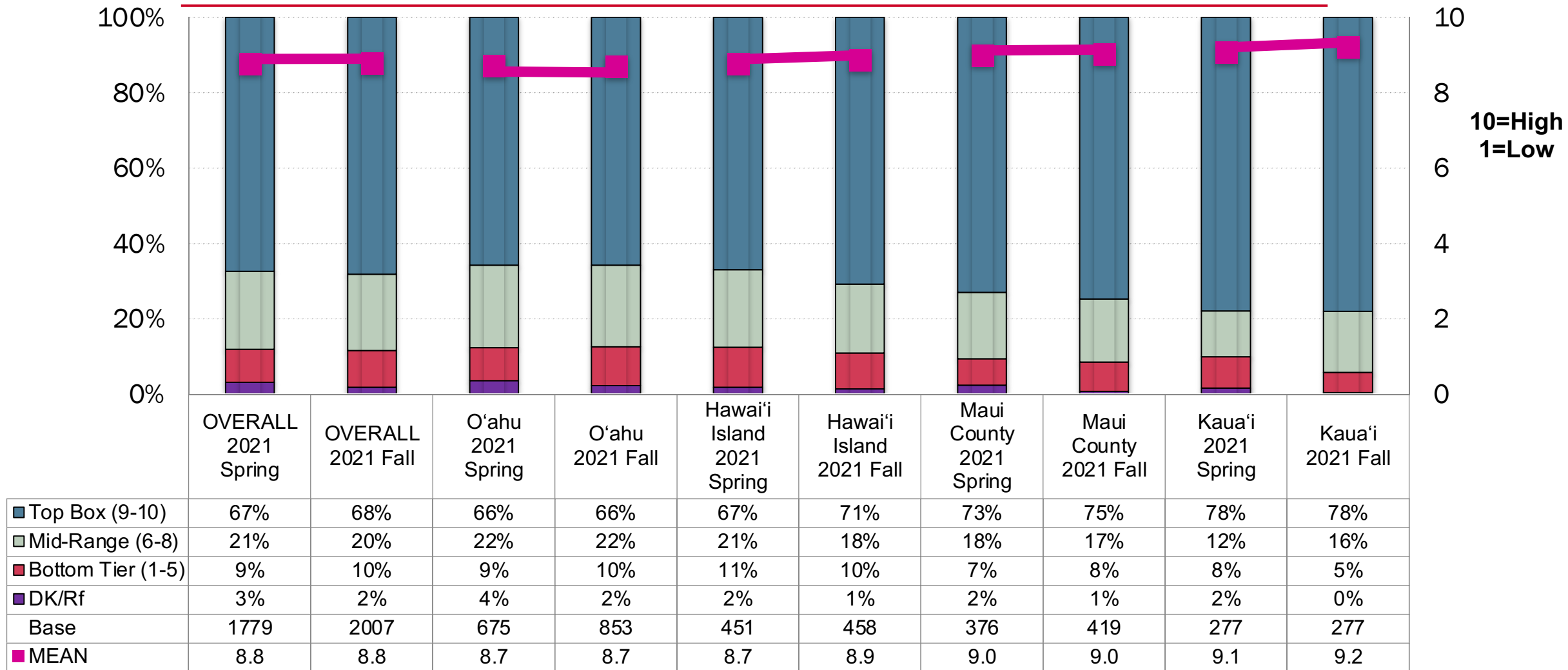
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“I feel like tourism is being better managed on my island” – By Demographics



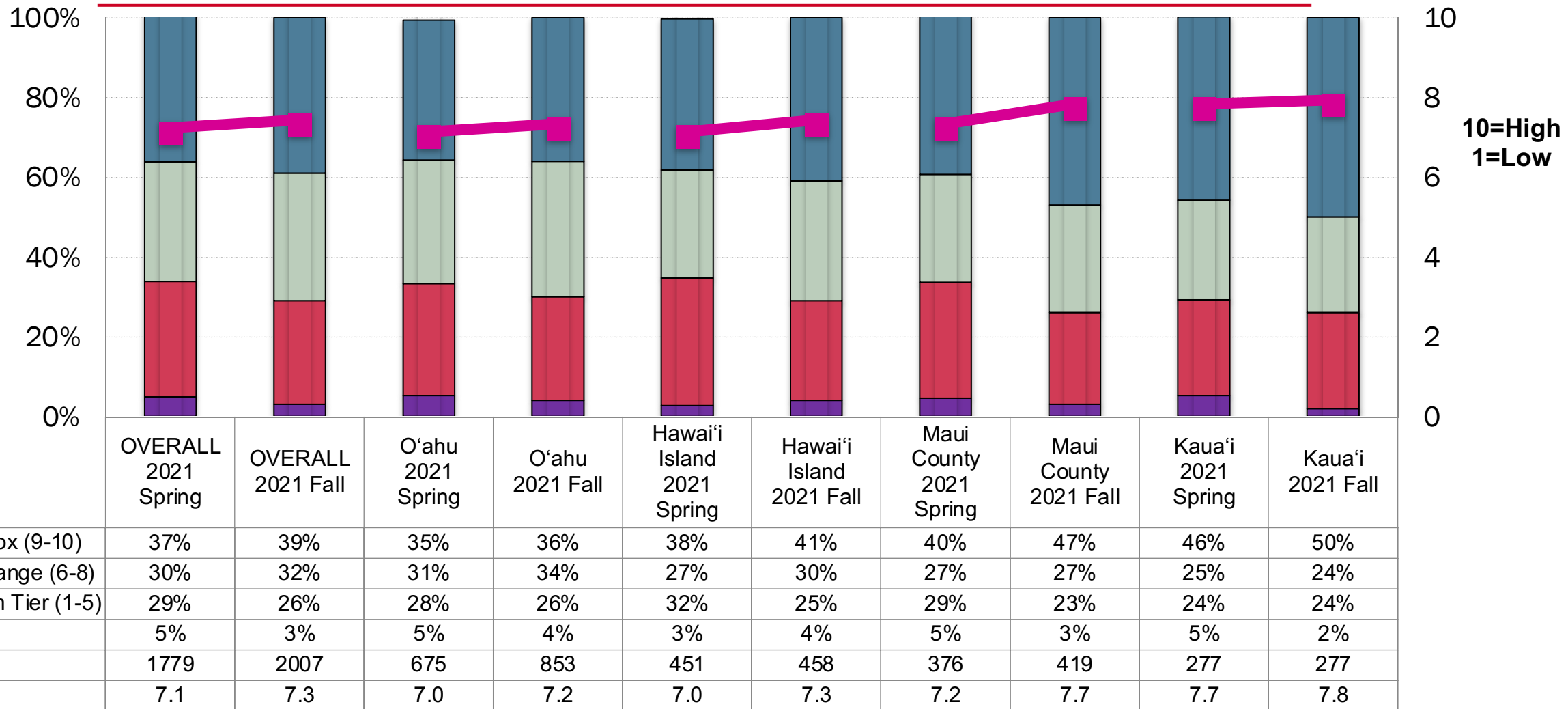
Q4.12. Please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Regenerative: “Educate visitors and residents to mālama the islands and each other” – *By Island*



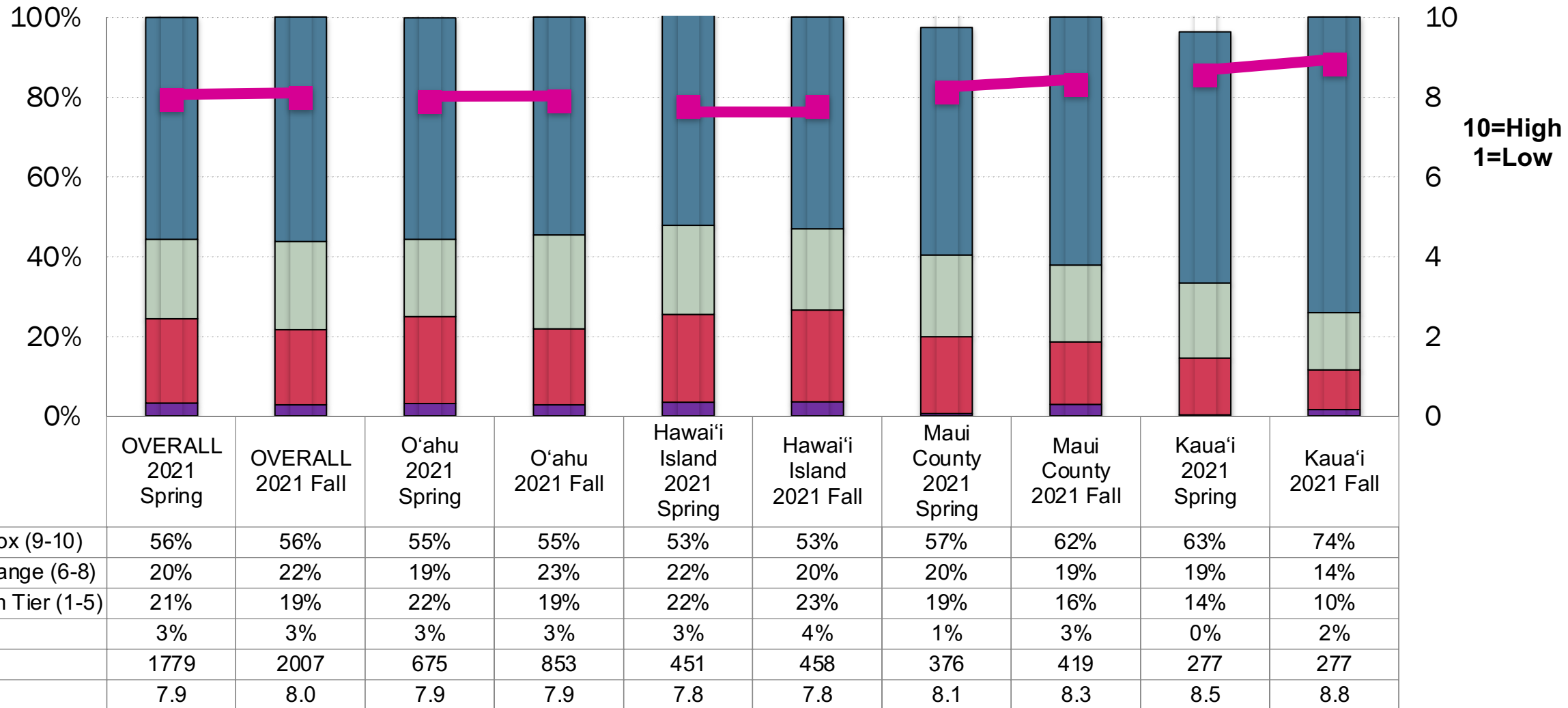
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

Regenerative: “Encourage visitors to volunteer and give back during their visits to Hawai‘i” – *By Island*



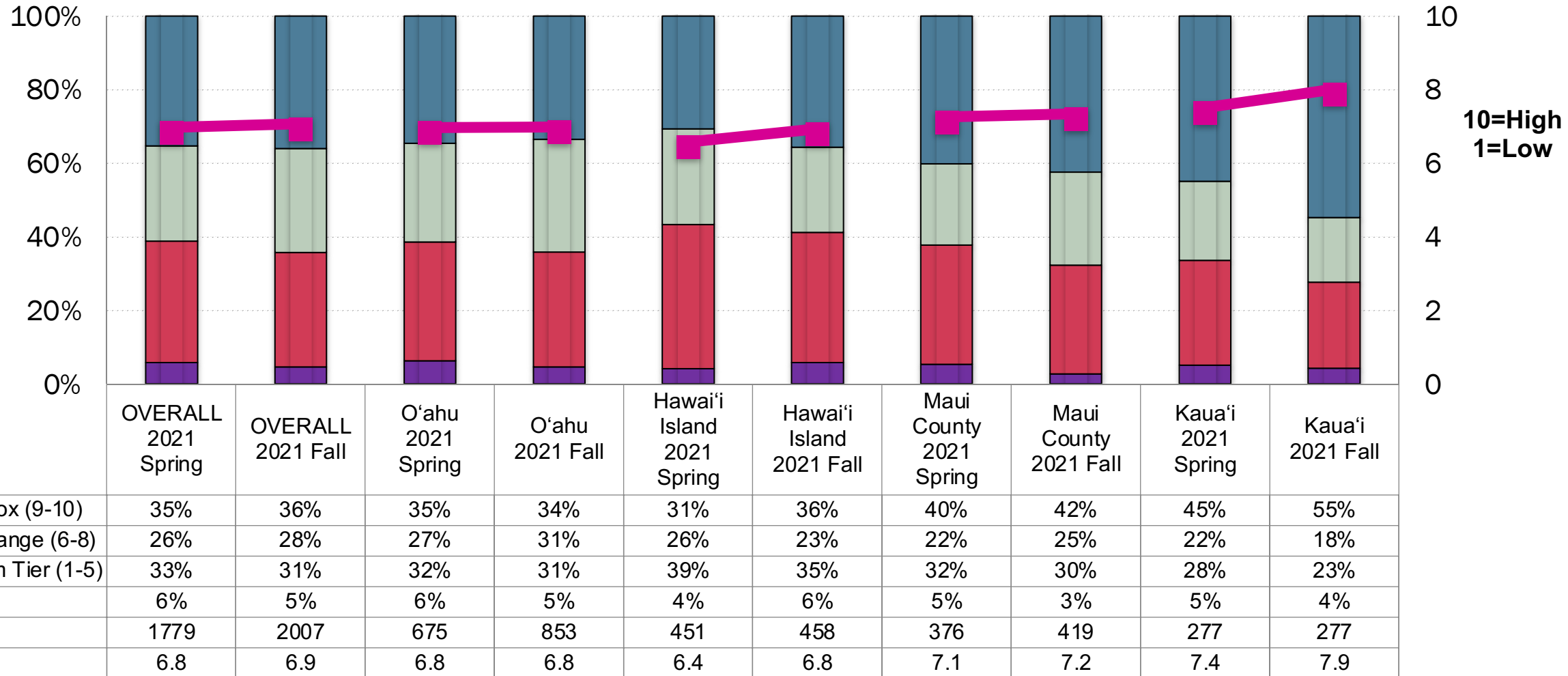
Q7. Legally, the state of Hawai‘i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

Accommodations: “Eliminate illegal vacation rentals on my island” – *By Island*



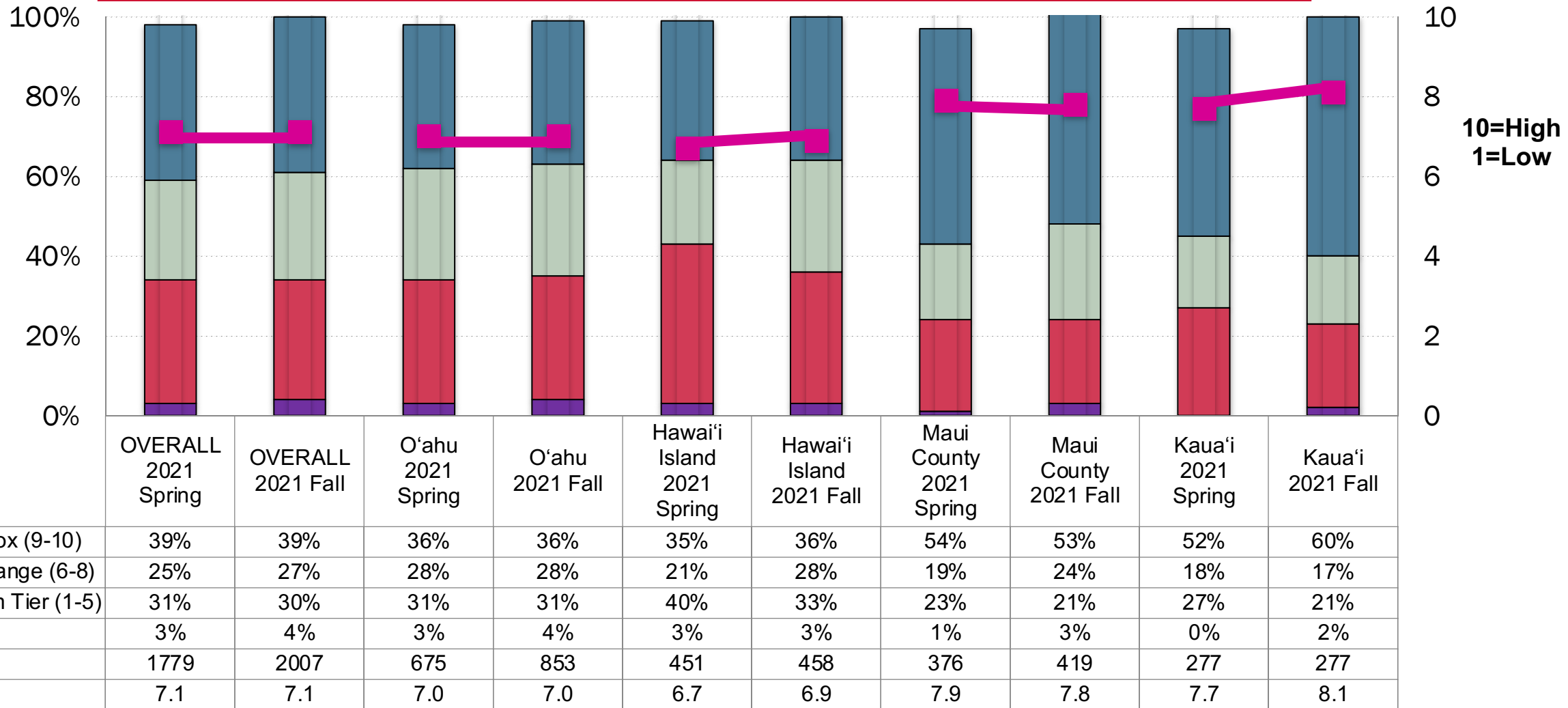
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

Accommodations: “Stop approval of additional legal vacation rentals on my island” – *By Island*



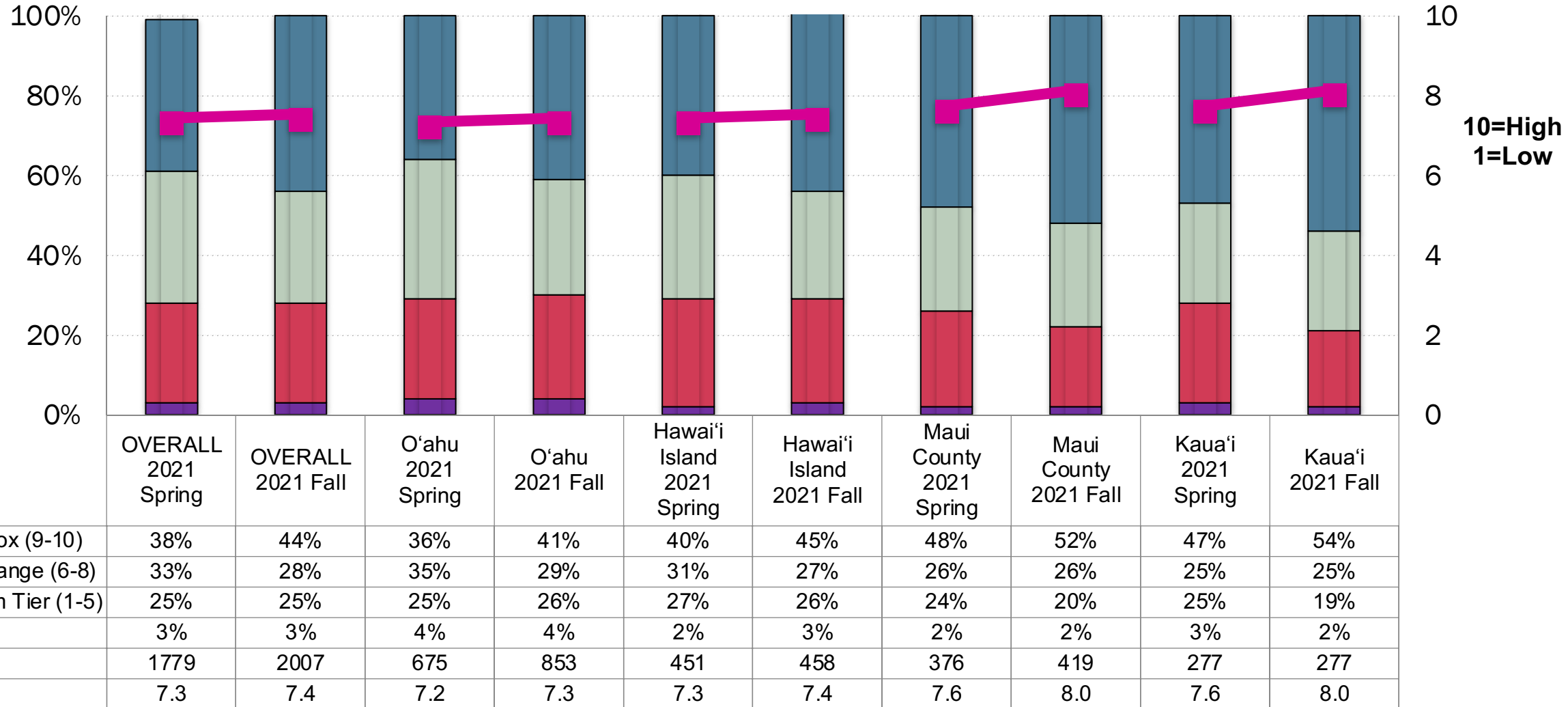
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

Accommodations: “Do not allow building of additional hotel/condo/timeshare units on my island” – *By Island*



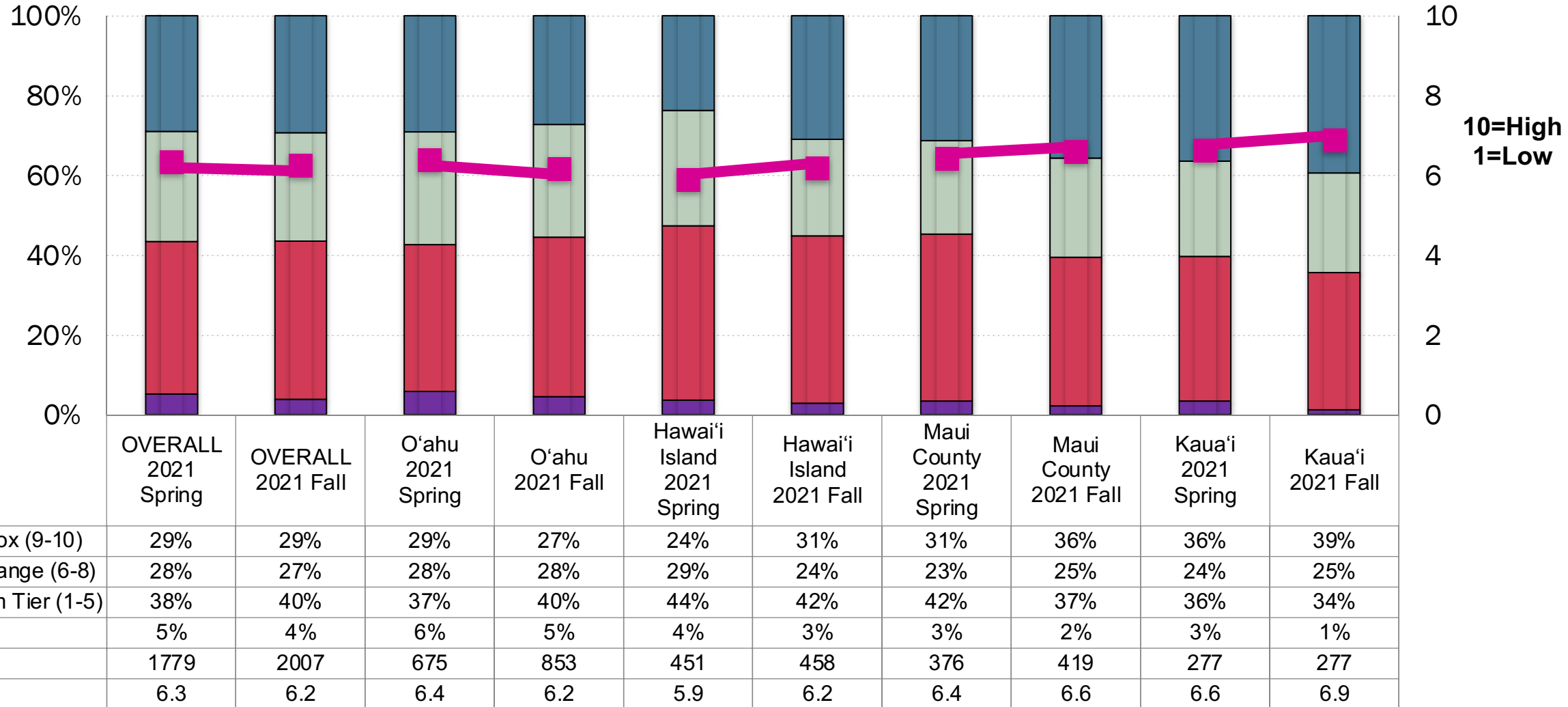
Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?

Access: “Charge visitor access fees to state parks and trails” – *By Island*



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 [INSERT] to help better manage tourism?

Access: “Designate resident-only days of the week at some state parks, beaches and trails” – *By Island*

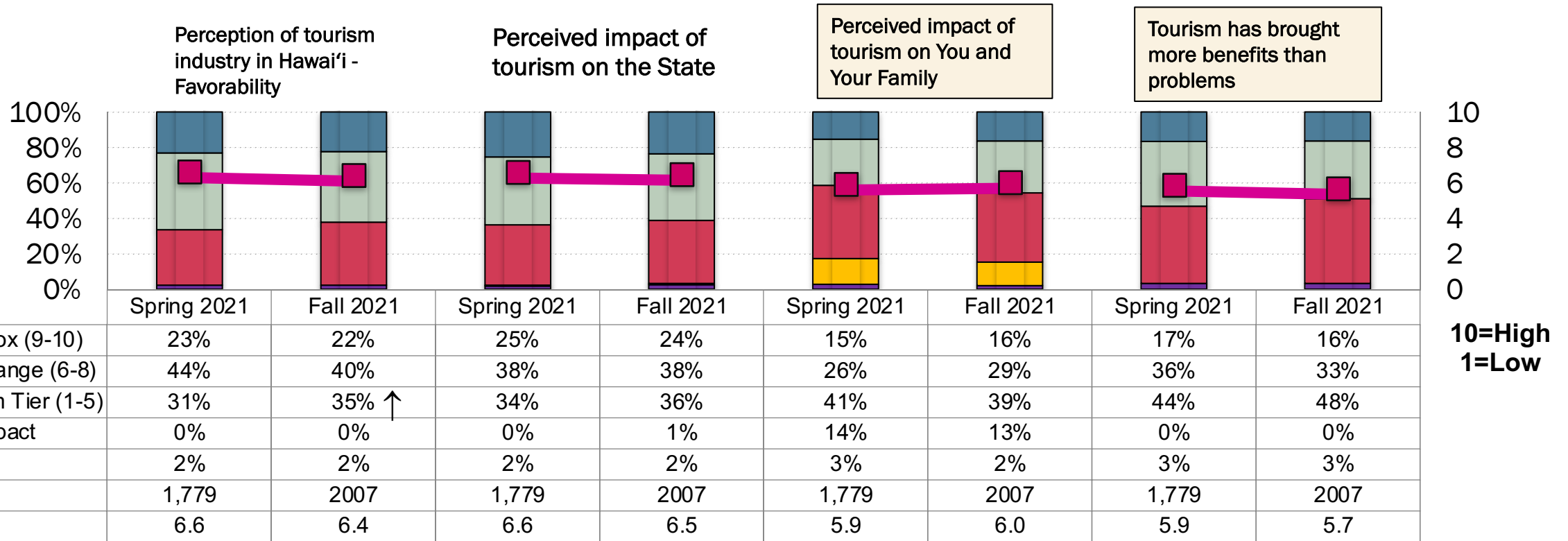


Q7. Legally, the state of Hawai'i is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state [INSERT] to help better manage tourism?



Appendix C: Overview of Fall 2021 Resident Sentiment Indicators

High Level Indicators of Resident Sentiment

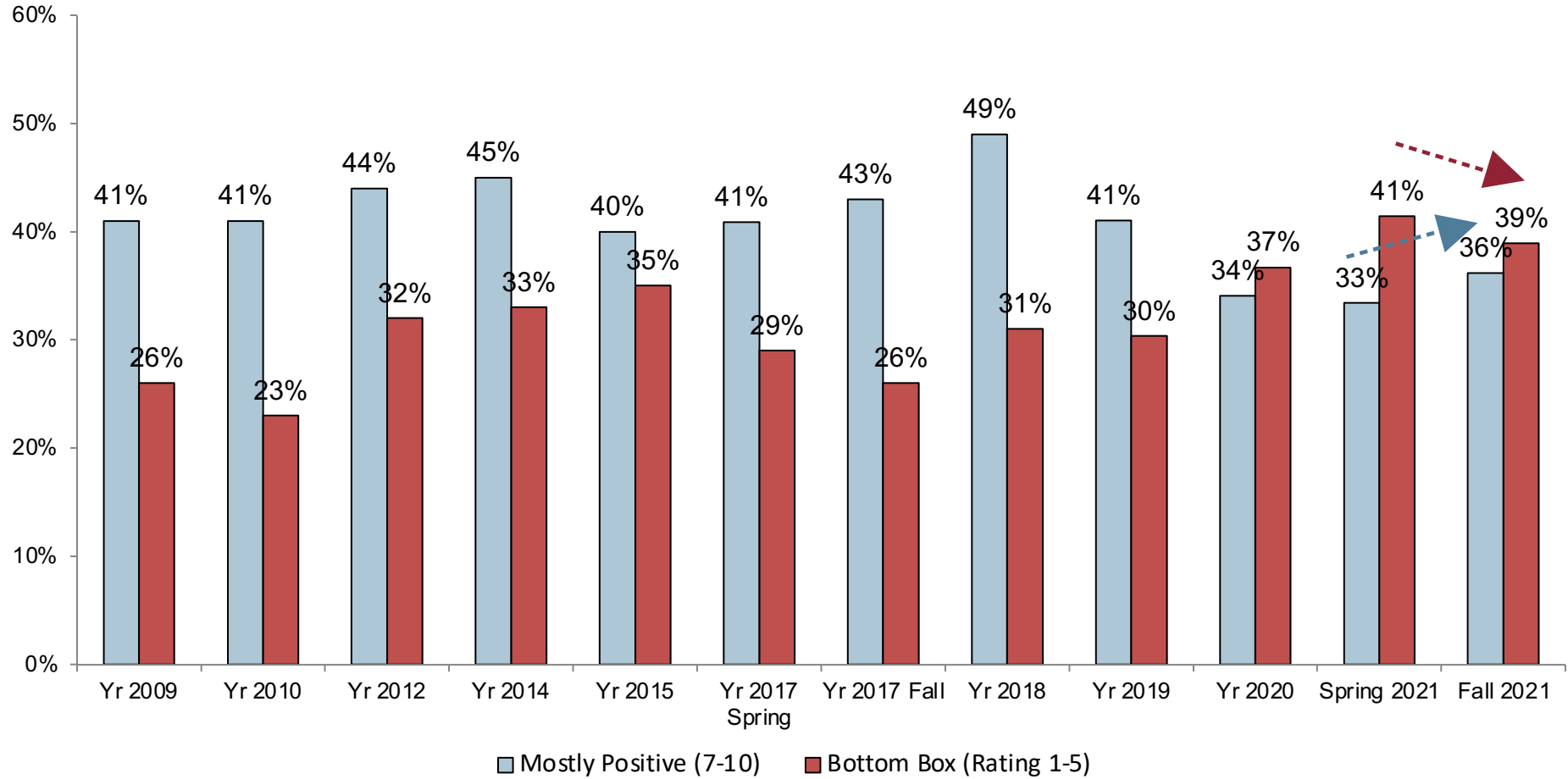


Q1. Using a 10-point scale where 10 means Extremely Favorable and 1 means Not Favorable at All, please give me your opinion of tourism as an industry in Hawai'i.

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?

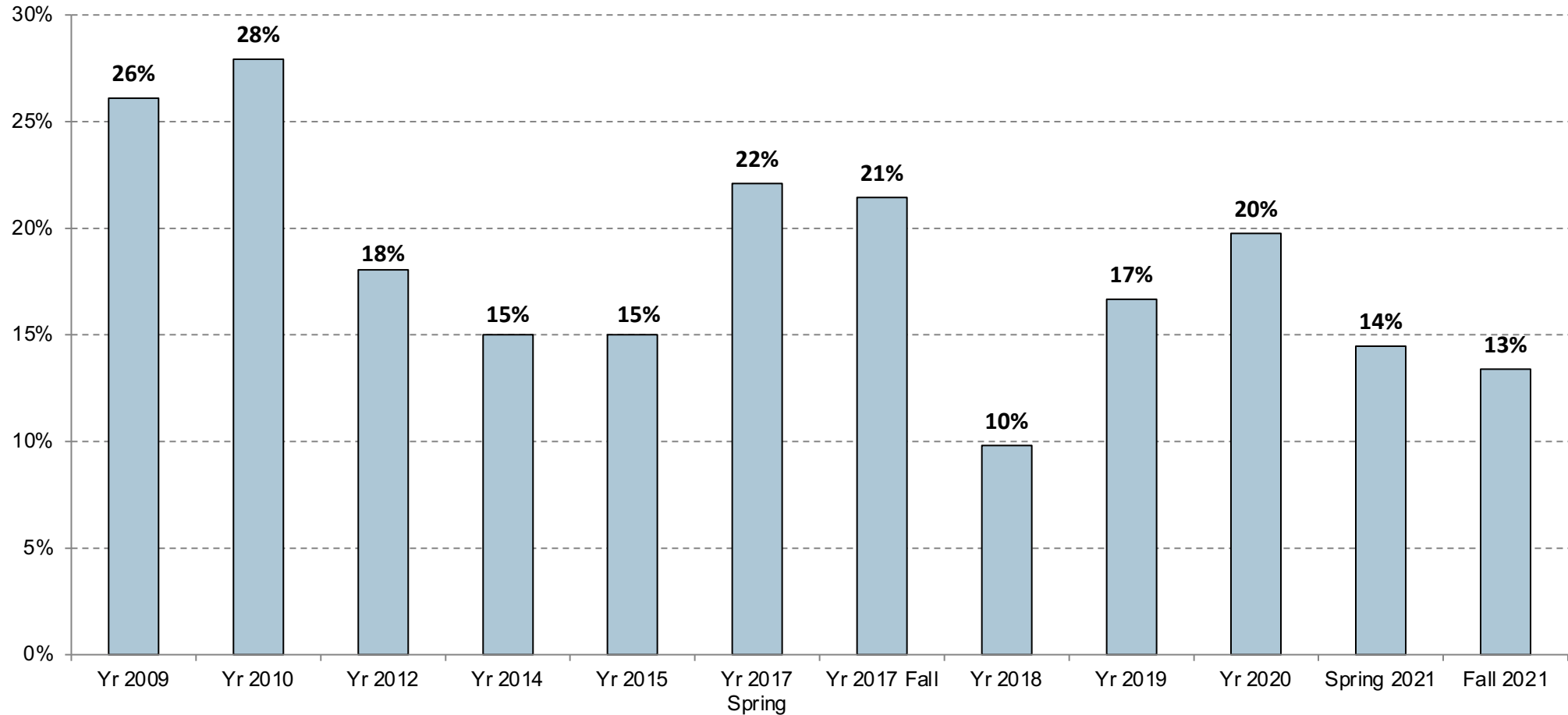
Q4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Impact of Tourism on You & Your Family



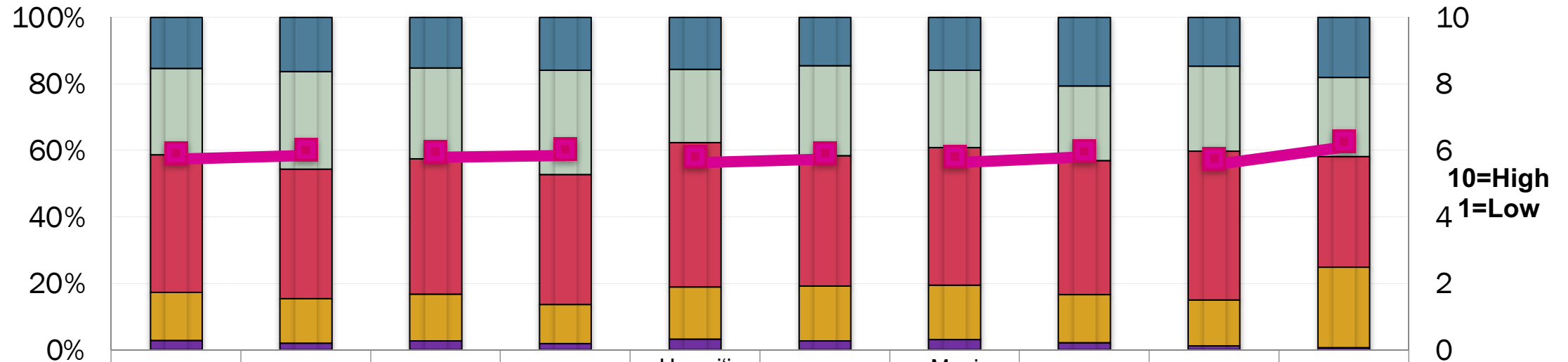
Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

Impact of Tourism on You & Your Family – No Impact



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?

Impact of Tourism on You & Your Family - *By Island*

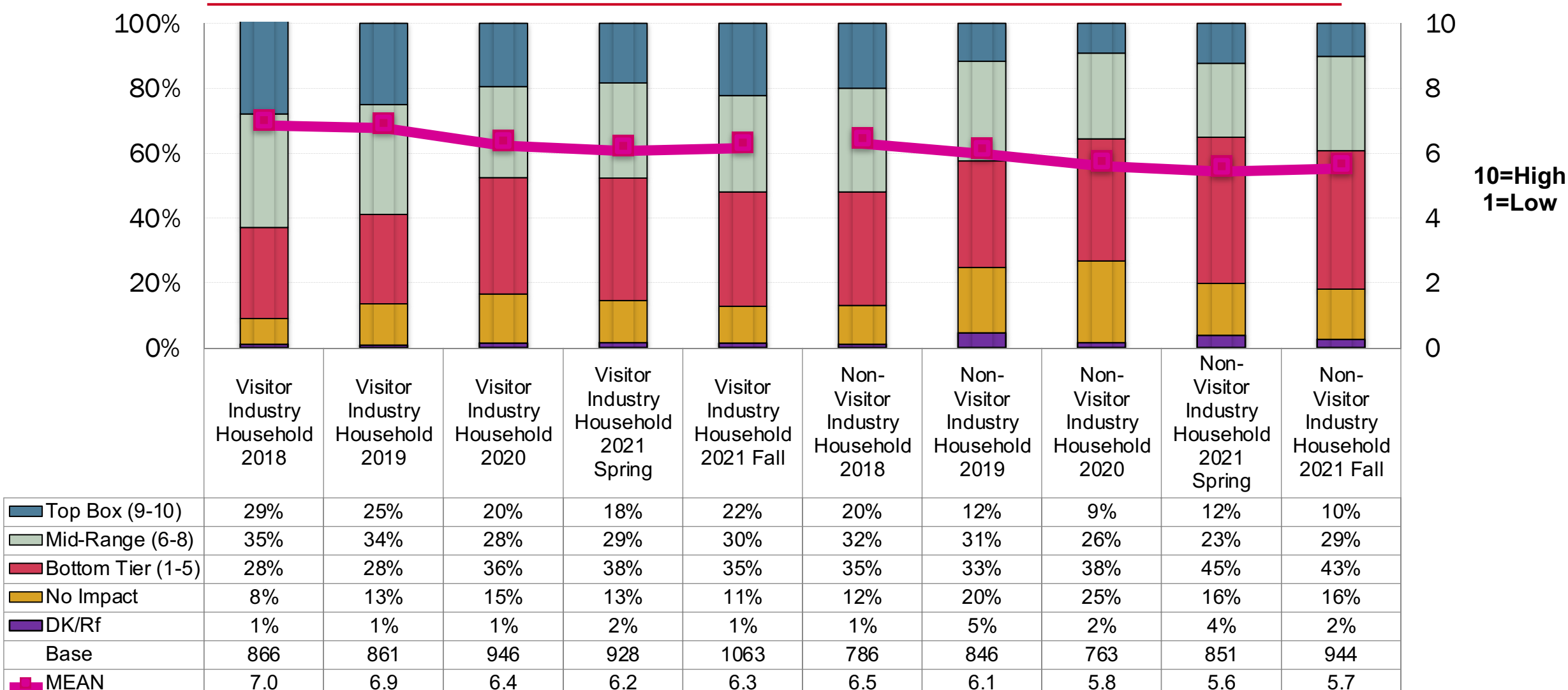


	OVERALL 2021 Spring	OVERALL 2021 Fall	O'ahu 2021 Spring	O'ahu 2021 Fall	Hawai'i Island 2021 Spring	Hawai'i Island 2021 Fall	Maui County 2021 Spring	Maui County 2021 Fall	Kaua'i 2021 Spring	Kaua'i 2021 Fall
Top Box (9-10)	15%	16%	15%	16%	16%	14%	16%	21%	15%	18%
Mid-Range (6-8)	26%	29%	27%	31%	22%	27%	23%	22%	26%	24%
Bottom Tier (1-5)	41%	39%	41%	39%	43%	39%	41%	40%	45%	33% ↓
No Impact	14%	13%	14%	12%	16%	17%	16%	15%	14%	24% ↑
DK/Rf	3%	2%	3%	2%	3%	3%	3%	2%	1%	1%
Base	1779	2007	675	853	451	458	376	419	277	277
MEAN	5.91	6.01	5.96	6.02	5.81	5.91	5.81	5.97	5.74	6.27

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?

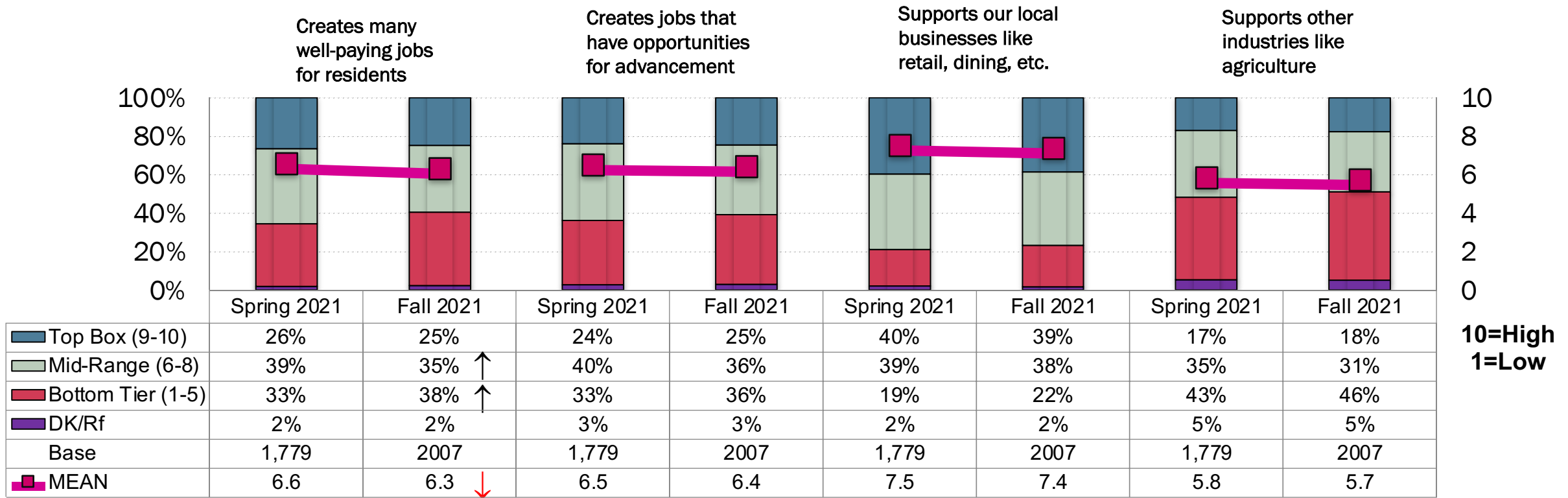
Impact of Tourism on You & Your Family-

Visitor Industry Household vs Non-Visitor Industry Household



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?

Economic Impact Indicators

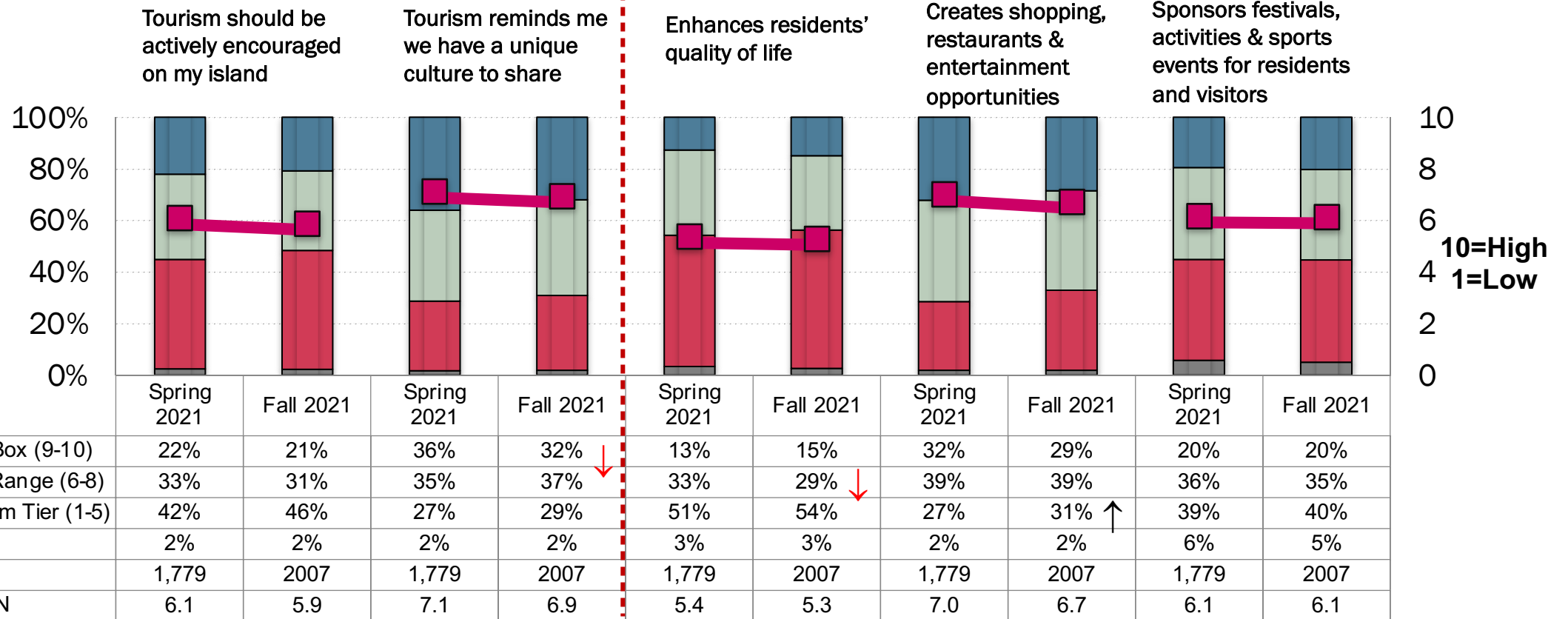


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.

Economic Impact (continued)/Quality of Life Indicators

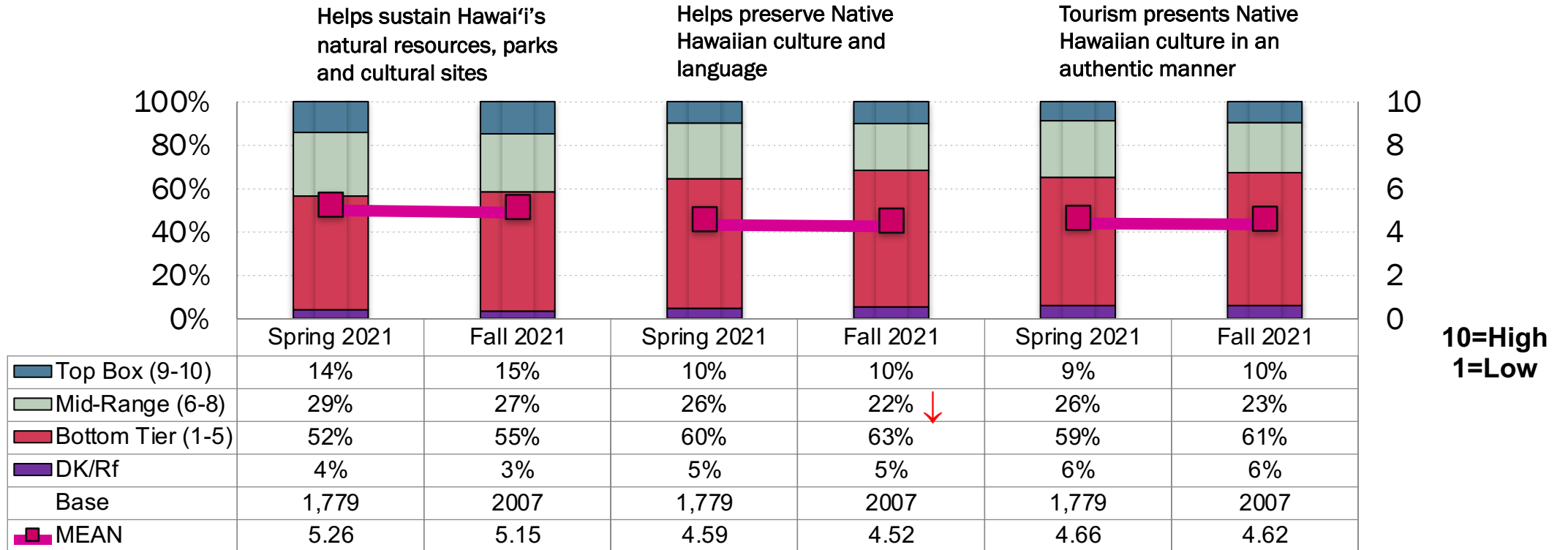
Economic Impact

Quality of Life



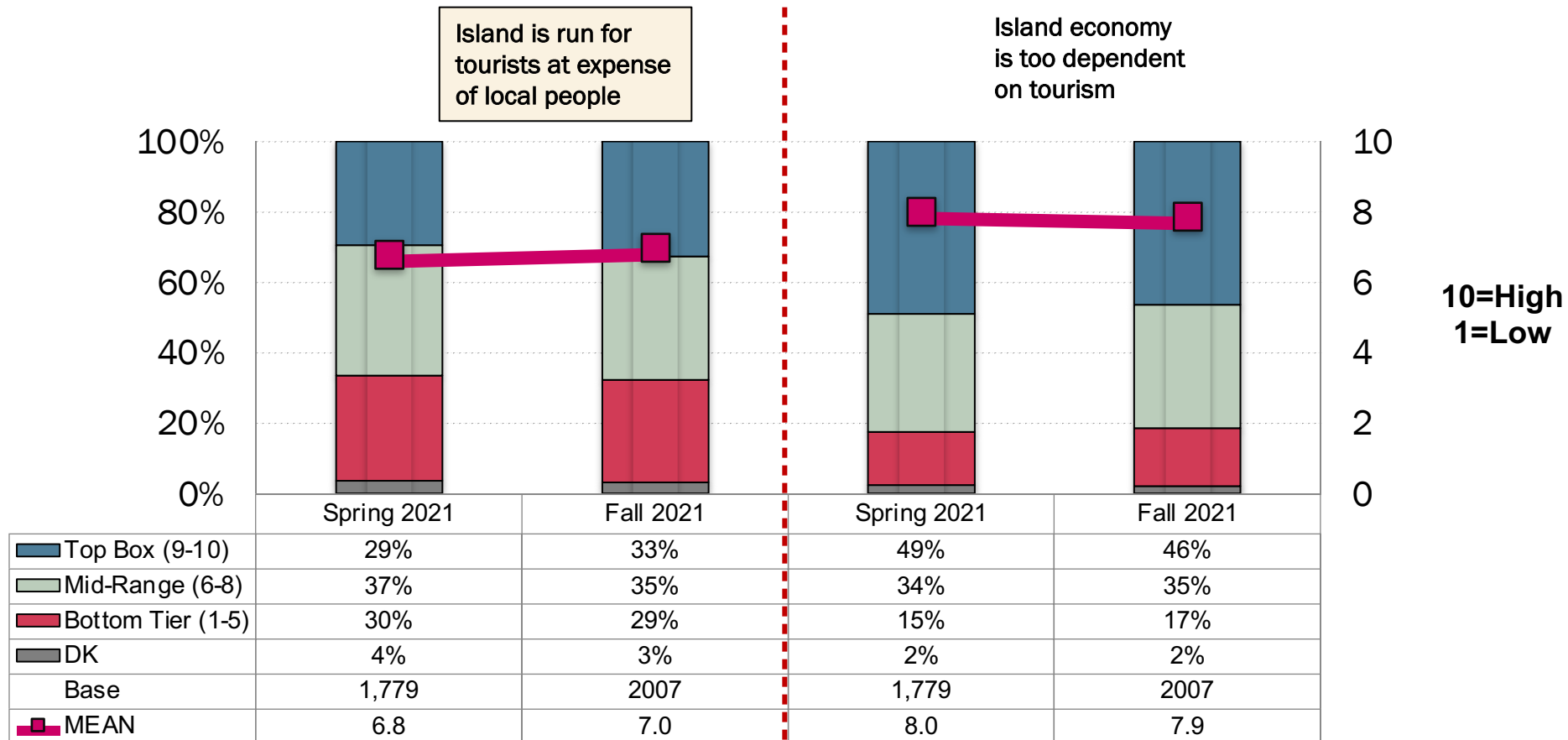
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Executive Summary – Natural Resources and Cultural Sustainability Indicators



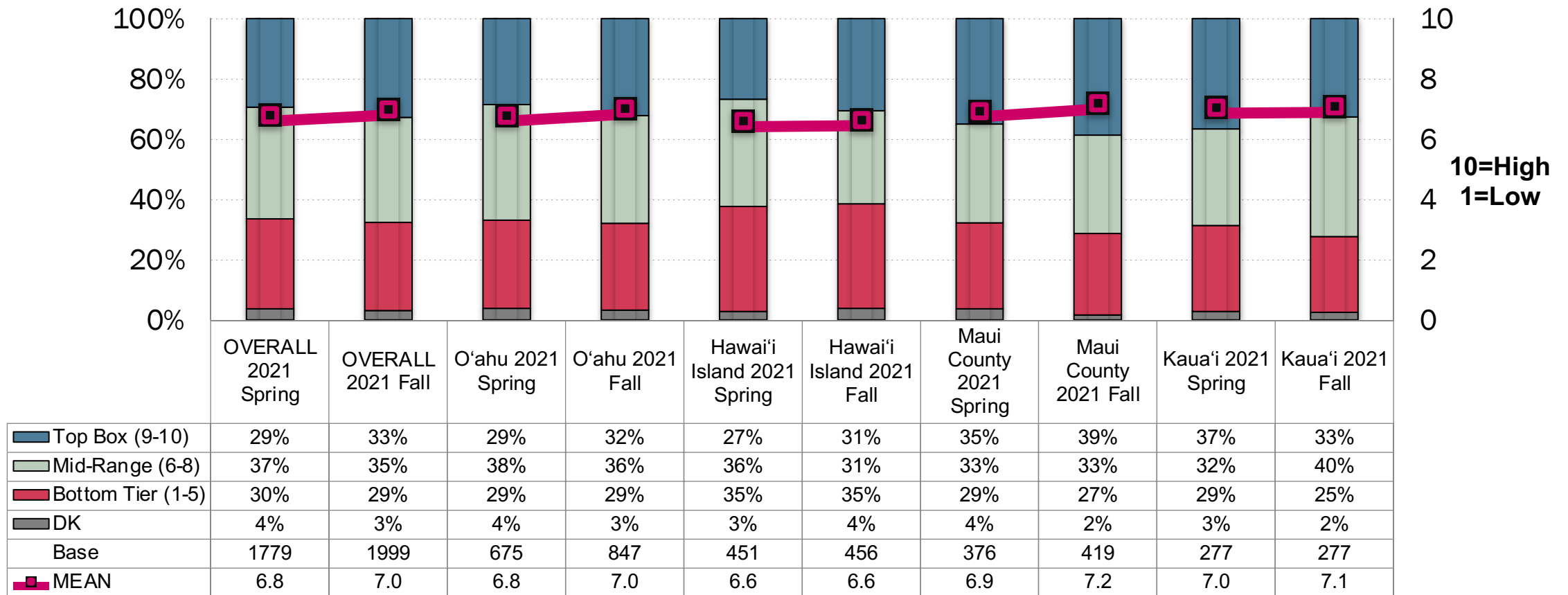
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Negative Impact Indicators



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.

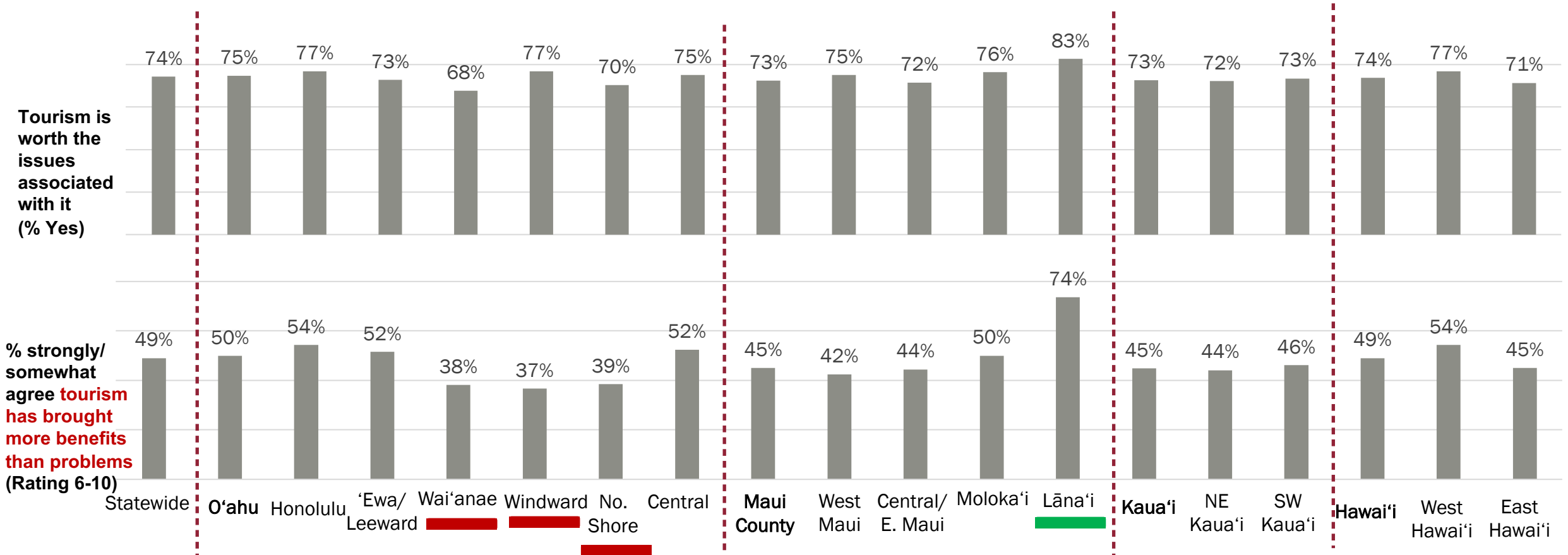
“This island is being run for tourists at the expense of local people” – *By Island*



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...?

Executive Summary – Tourism worth the issues/Benefits outweigh Problems by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on the islands of O’ahu – Wai’anae Windward, and North Shore; they were less so on Lāna’i.

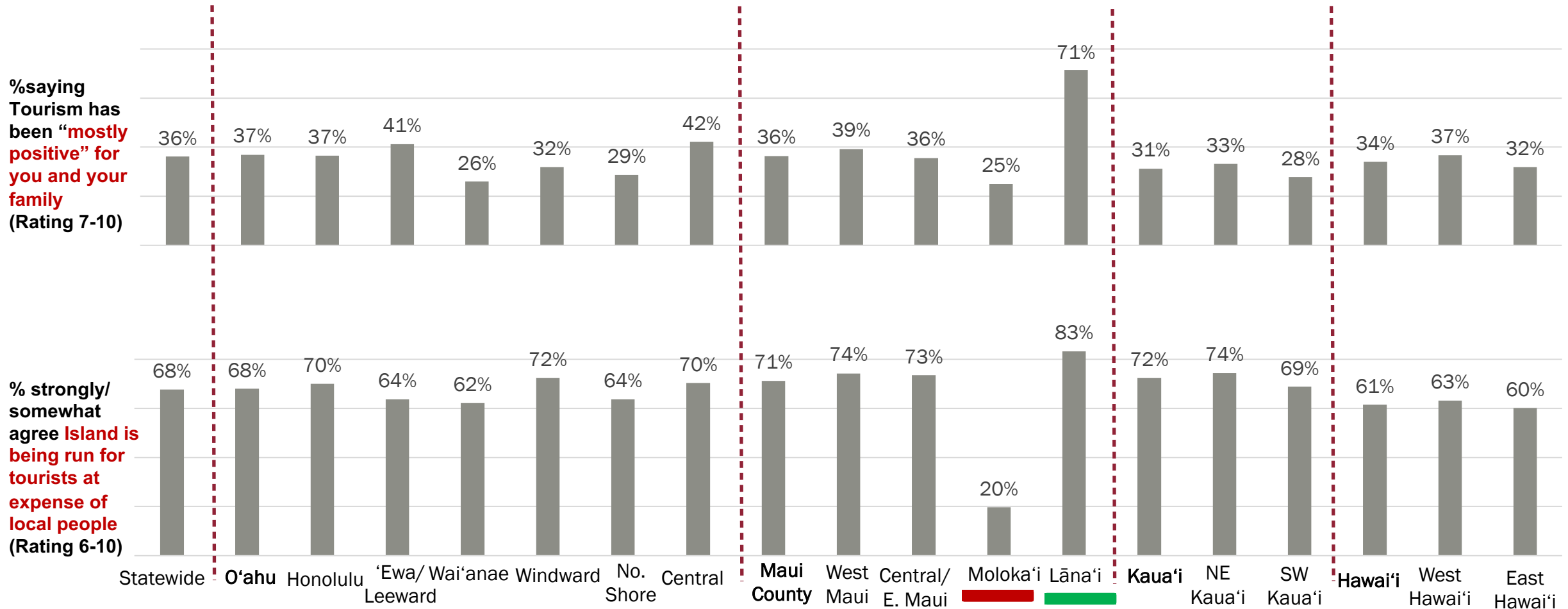


Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

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.

Executive Summary – Resident Sentiment by Island/Area

On the geographic level, residents were particularly critical of tourism and its impact on **Moloka'i** and less so on **Lāna'i**. Only 25 percent of Moloka'i residents say the industry is 'mostly positive' for themselves and their family.



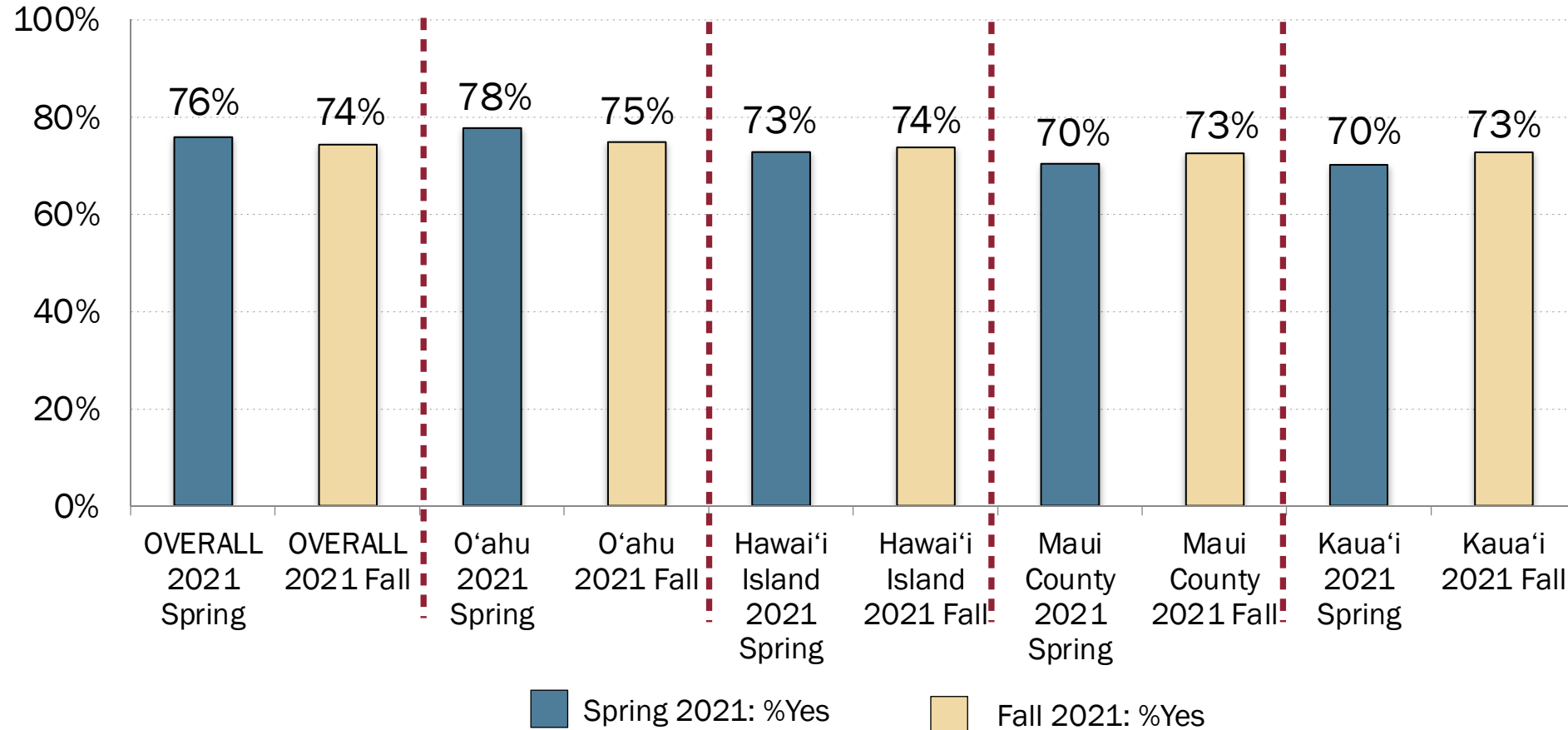
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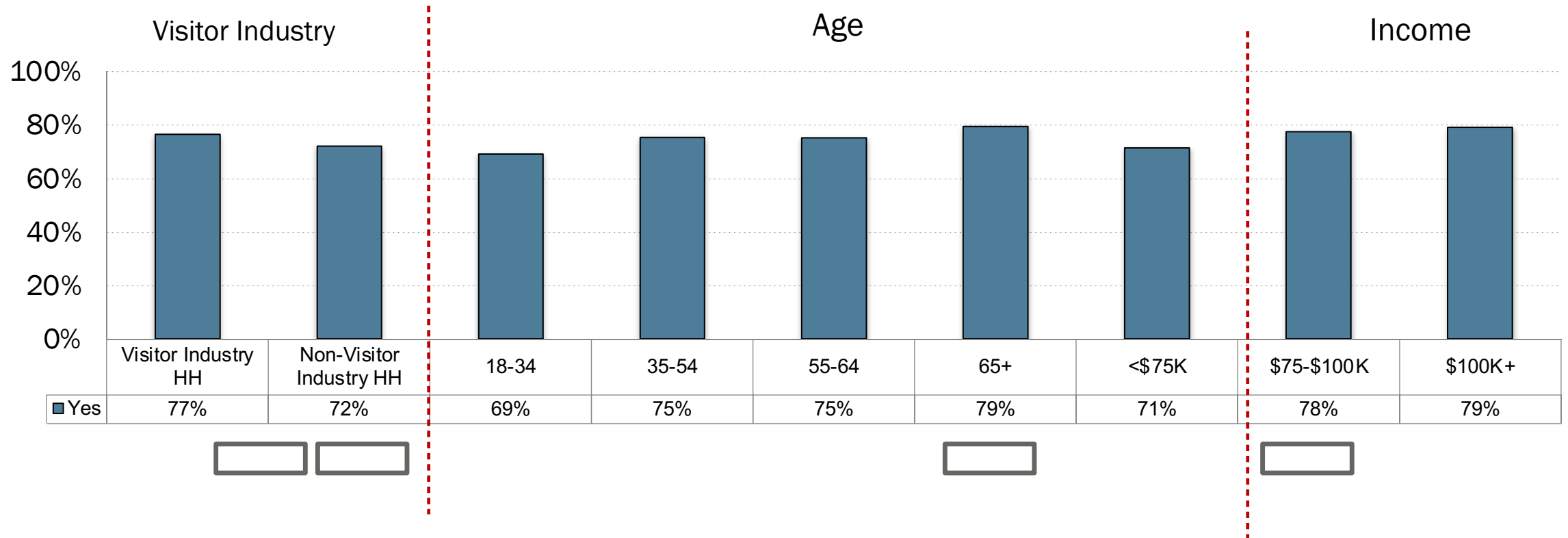
Appendix D: Is Tourism Worth the Issues Associated with it?

“Do you think tourism is worth the issues associated with the industry?” – *By Island*



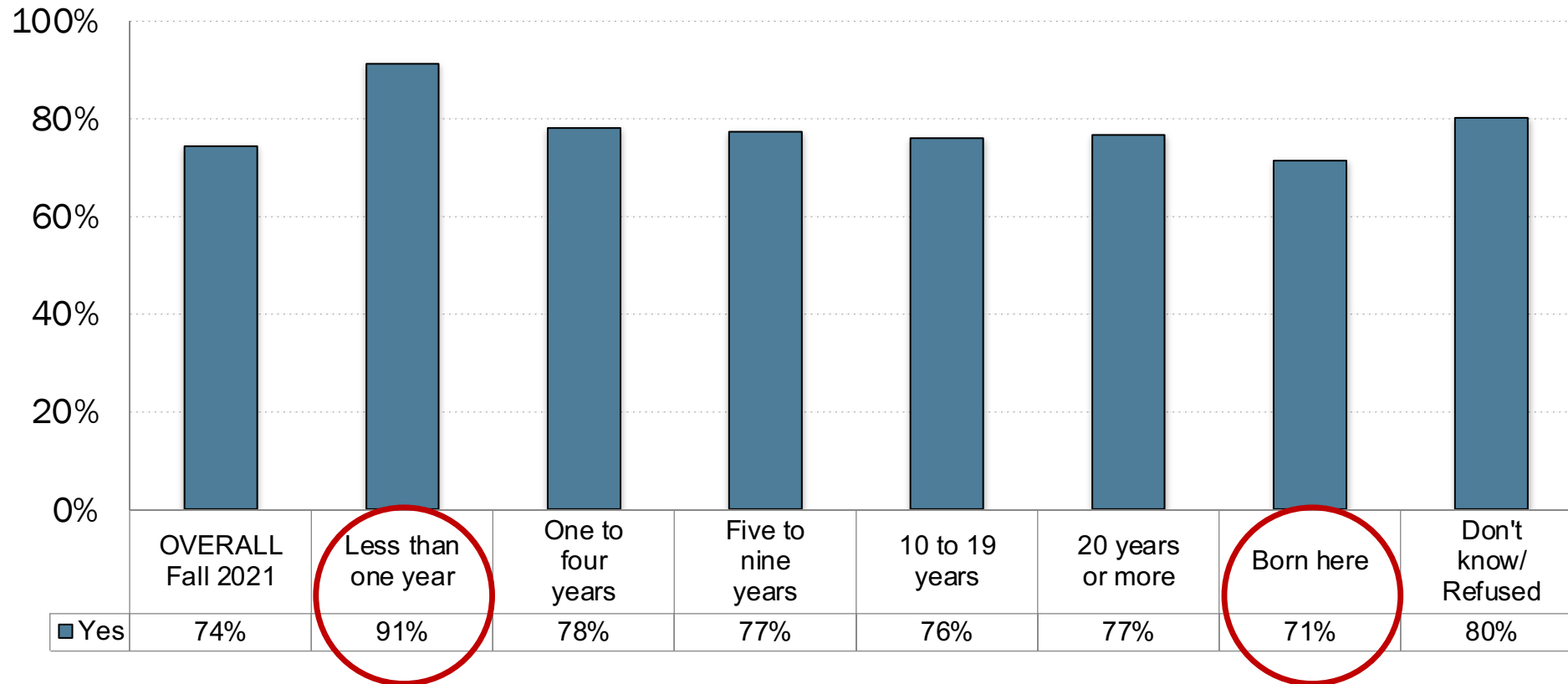
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“Do you think tourism is worth the issues associated with the industry?” – *By Demographics*



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?

“Do you think tourism is worth the issues associated with the industry?” – *By Number of Years of Living in Hawai‘i*



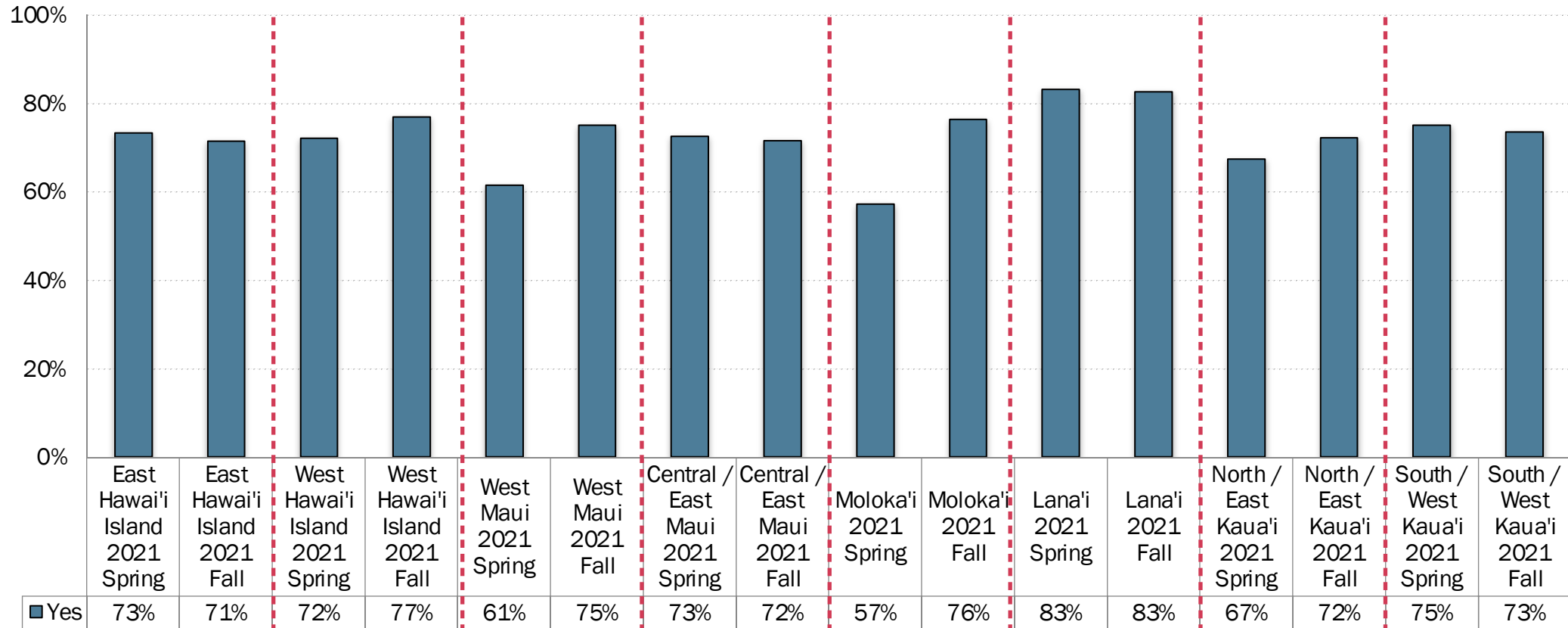
Q3. In 2019, visitors spent nearly \$18 billion in Hawai‘i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

“Do you think tourism is worth the issues associated with the industry?” - *By Area*



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?

“Do you think tourism is worth the issues associated with the industry?” - *By Area* (Continued)



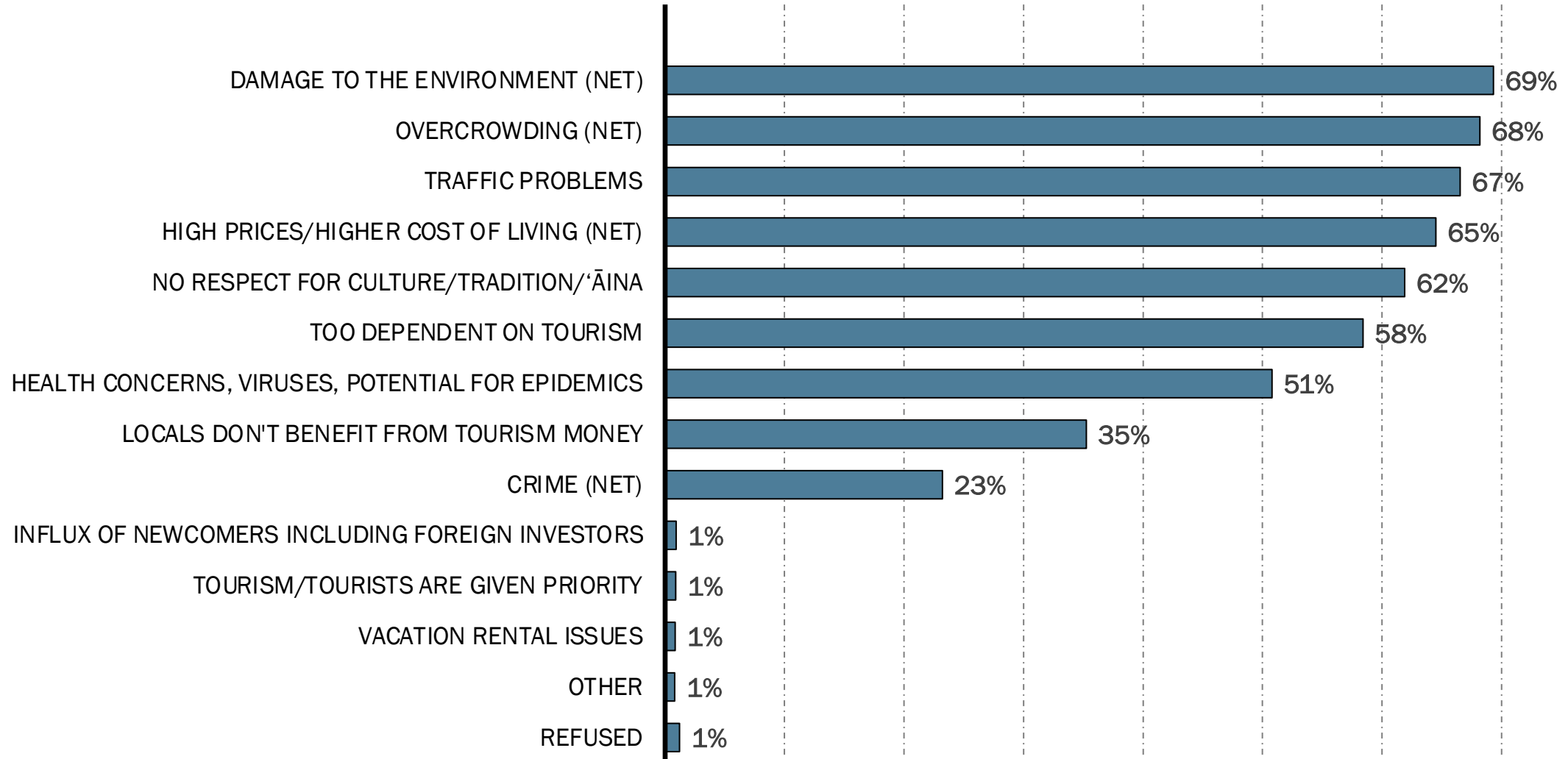
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Appendix E: Problems Created by Tourism

Problems Created by Tourism in Hawai'i (Fall 2021 only)

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

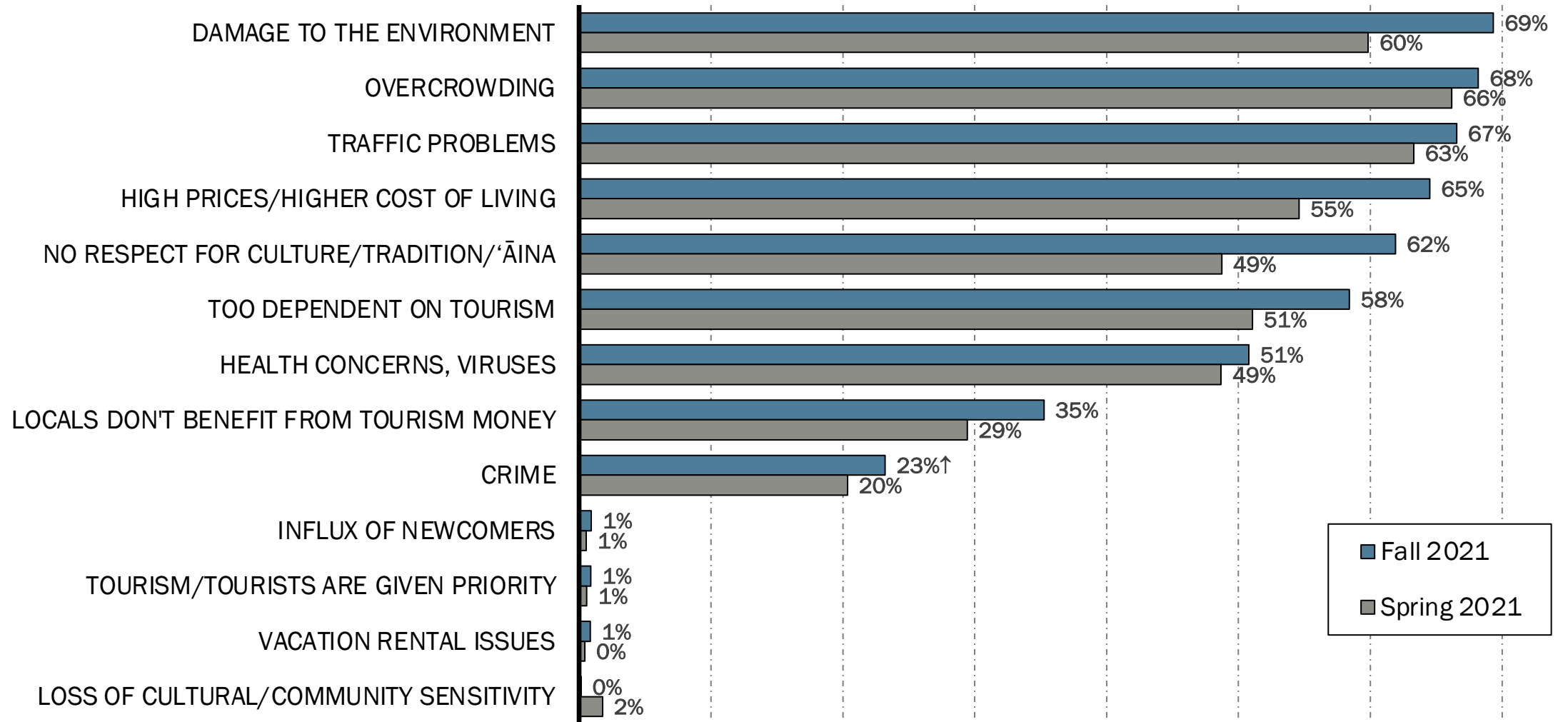


Base: 973

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

Problems Created by Tourism in Hawai'i (Trends Spring and Fall 2021)

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

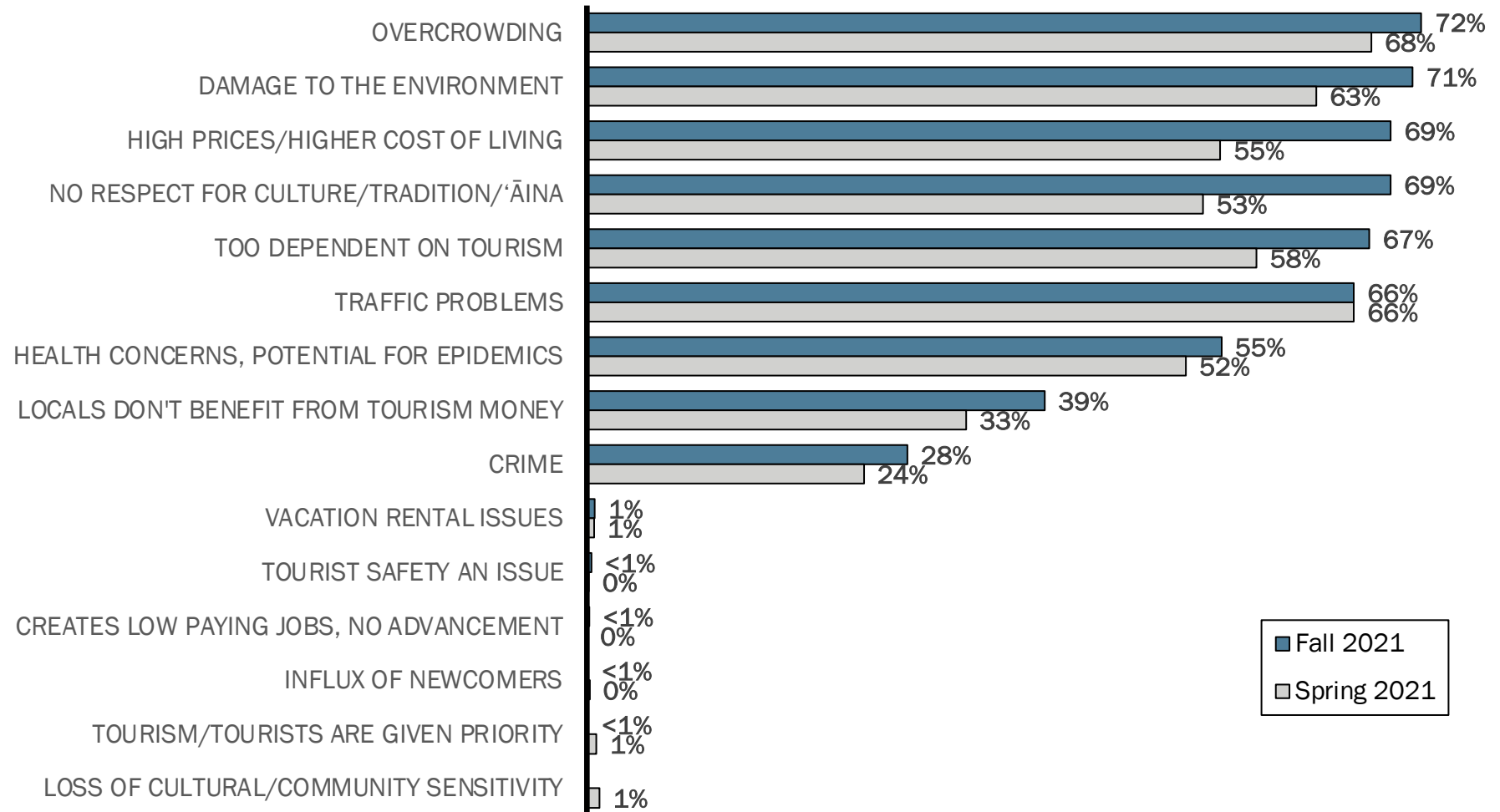


Base: Spring 2021 (808), Fall 2021 (973)

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

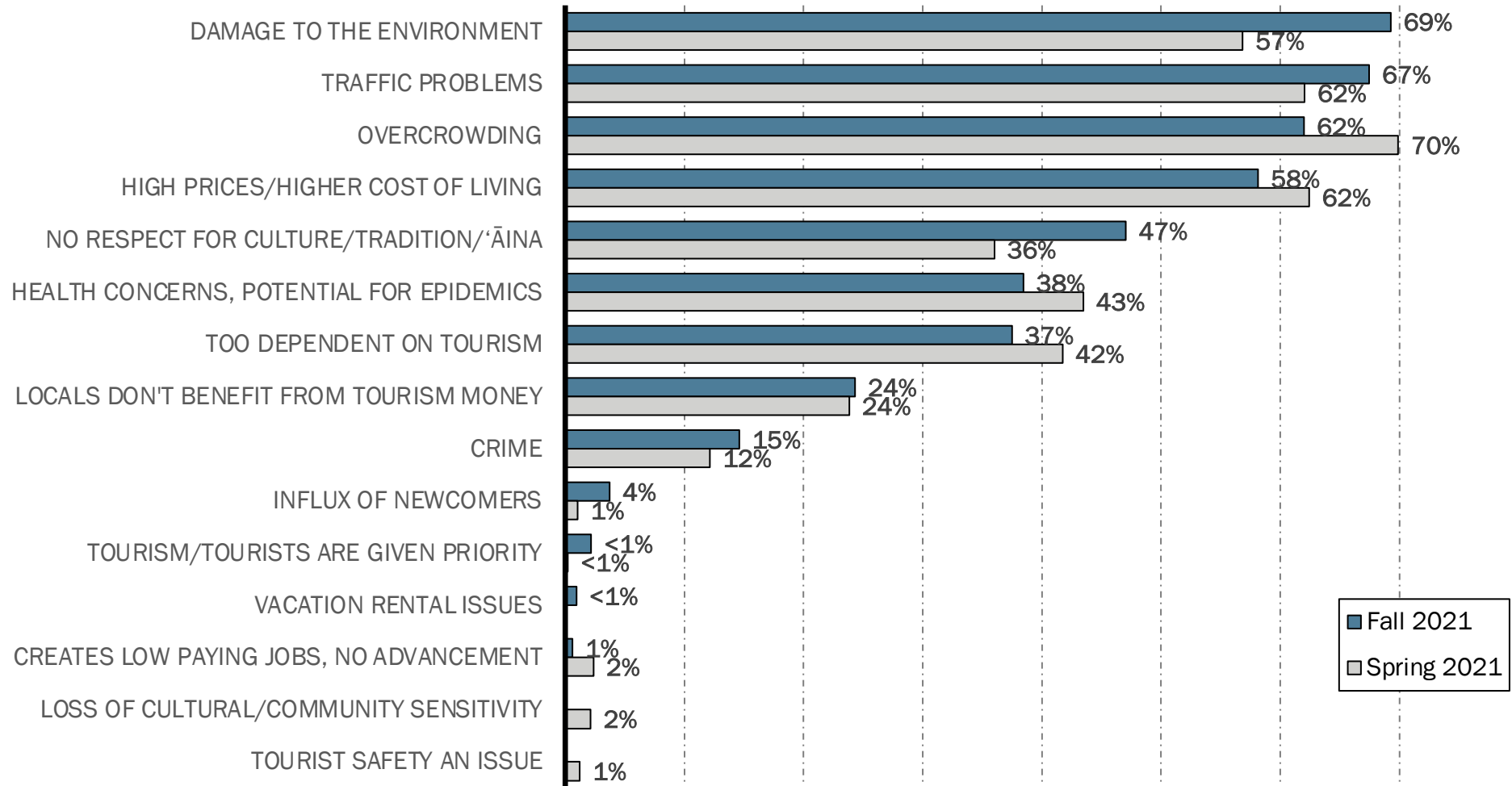
Problems Created by Tourism in Hawai'i: O'ahu Residents

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



Base: Fall 2021 (400), Spring 2021 (283)
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Problems Created by Tourism in Hawai'i: Maui County Residents (According to residents saying Hawai'i tourism creates more problems than benefits)

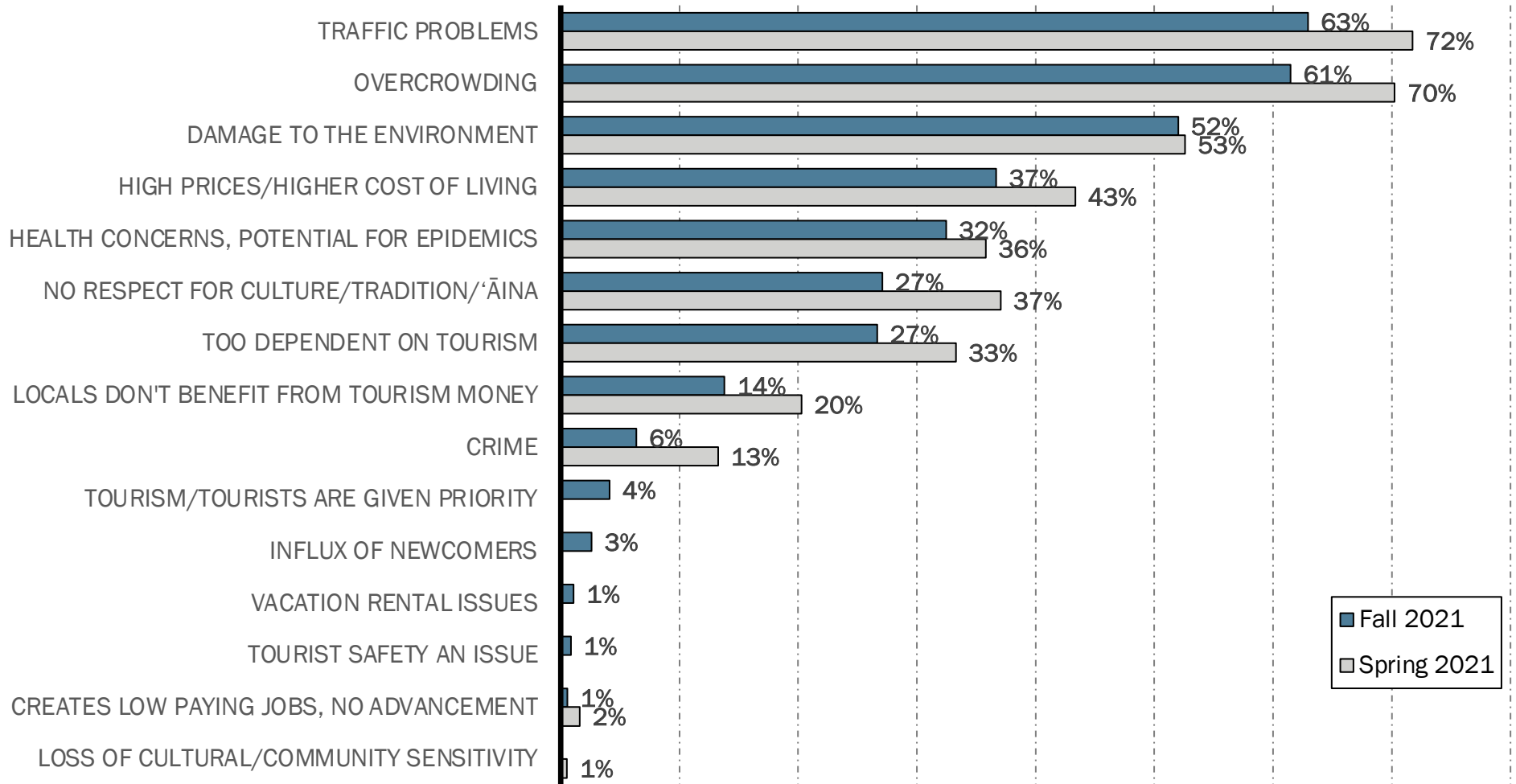


Base: Fall 2021 (216), Spring 2021 (195)

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

Problems Created by Tourism in Hawai'i: **Kaua'i Residents**

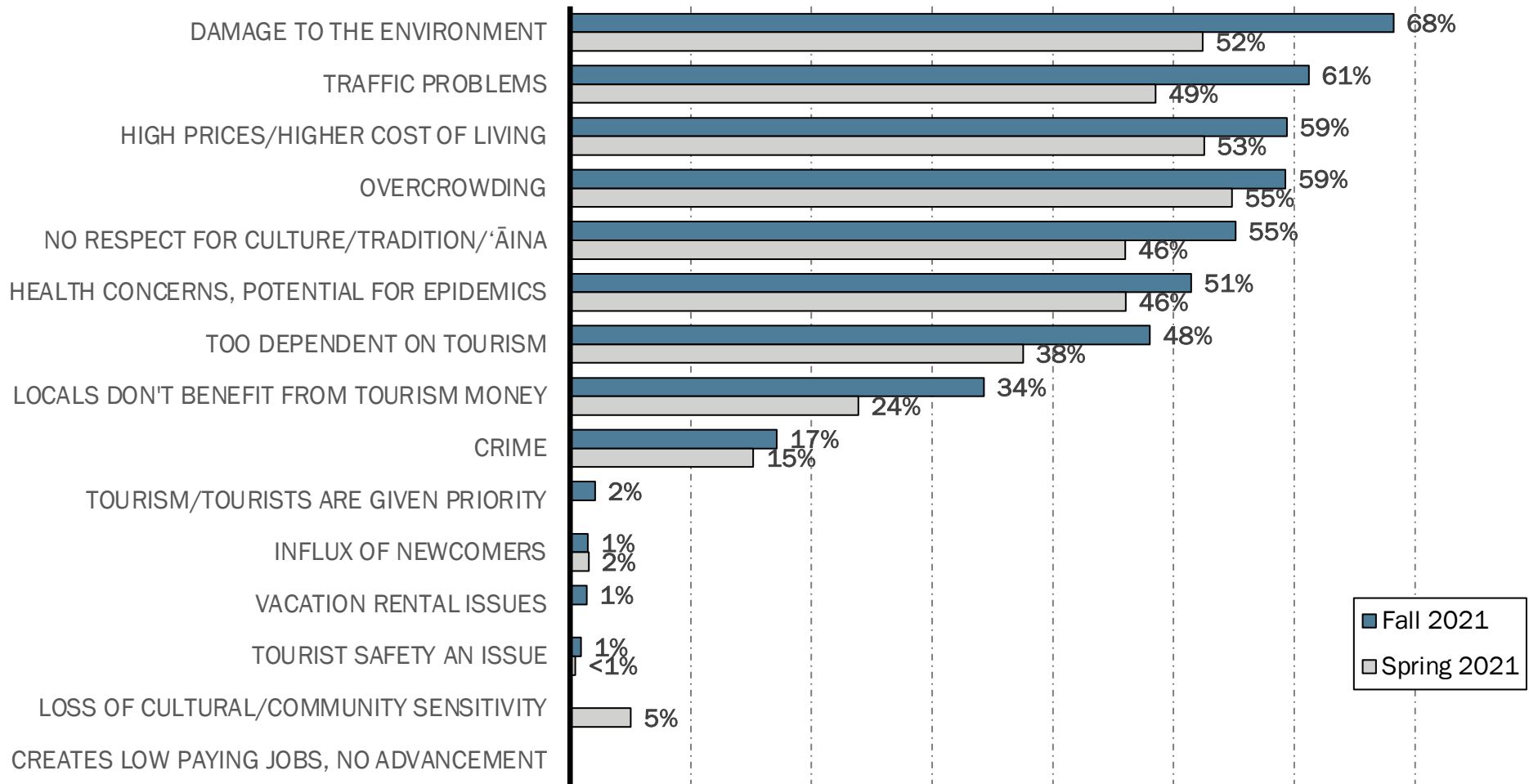
(According to residents saying Hawai'i tourism creates more problems than benefits)



Base: Fall 2021 (148), Spring 2021 (139)
 Q5. In your opinion, what problems do you think tourism has created in Hawai'i?

Problems Created by Tourism in Hawai‘i: Hawai‘i Island Residents

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

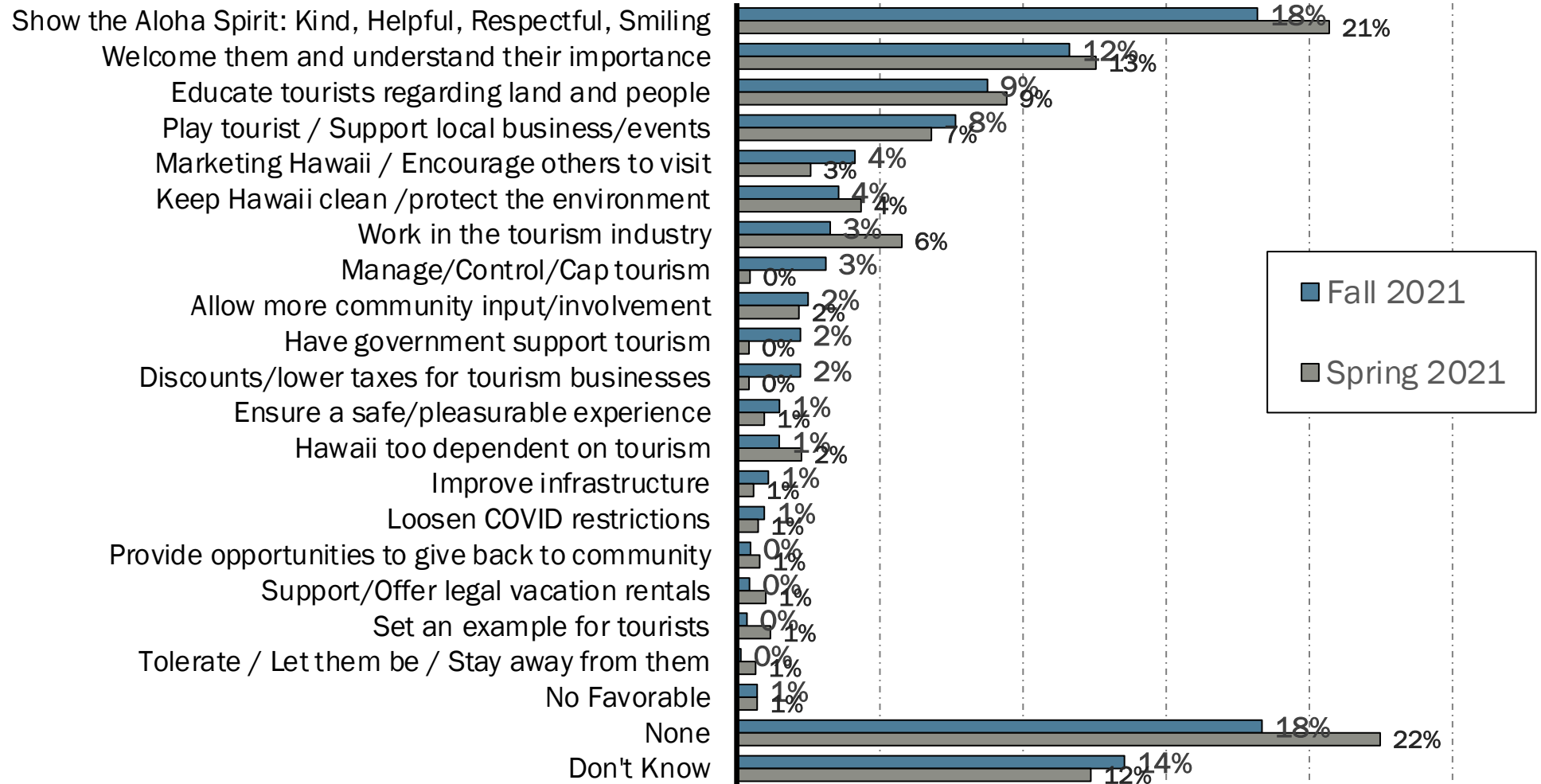


Base: Fall 2021 (209), Spring 2021 (191)

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

Ways Residents can Support Tourism in Hawai'i (Trends Spring and Fall 2021)

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



Base: 1144 (Spring 2021), 1248 (Fall 2021)

Q6. You indicated earlier that you were favorable toward tourism. Is there anything that residents like yourself can do to contribute to or support the tourism industry?