



Resident Sentiment on Travel and Tourism

Calendar Year 2023

A Syndicated Research Report Prepared for Visit California

Omnitrak's Syndicated National Resident Sentiment Research

Omnitrak's Syndicated National Resident Sentiment Research is an ongoing study of U.S. households that measures key indicators on how residents perceive travel and tourism in their area.



Methodology:

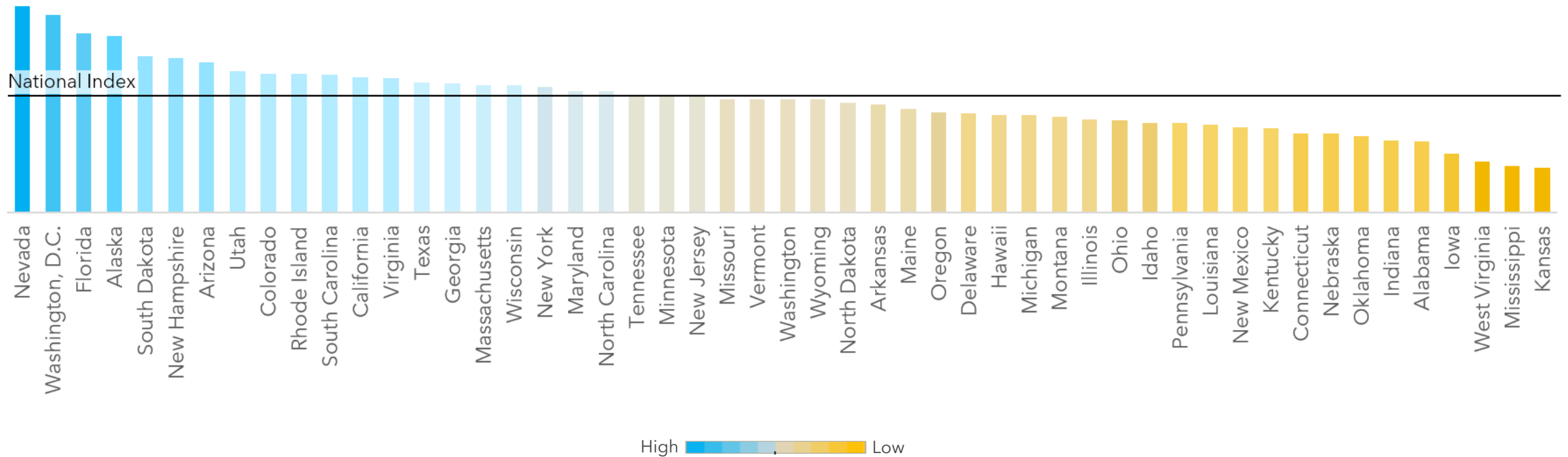
Omnitrak sources survey respondents from a managed panel provider to administer the ongoing Syndicated Resident Sentiment research.

- Nationally representative sample of U.S. households.
- More than 144,000 U.S. households annually
- Data collected on key indicators
- California Sample Size: n=17,494
- Data in report reflects January 2023 – December 2023

Expertise:

- Omnitrak has played an instrumental role in the development, fielding and analysis of Resident Sentiment research nationally. It launched one of the first in Hawaii in 2009.
- Omnitrak has extensive experience conducting in-depth custom Resident Sentiment studies for states and cities across the U.S.

Overview of Resident Sentiment Towards Travel & Tourism within the U.S.

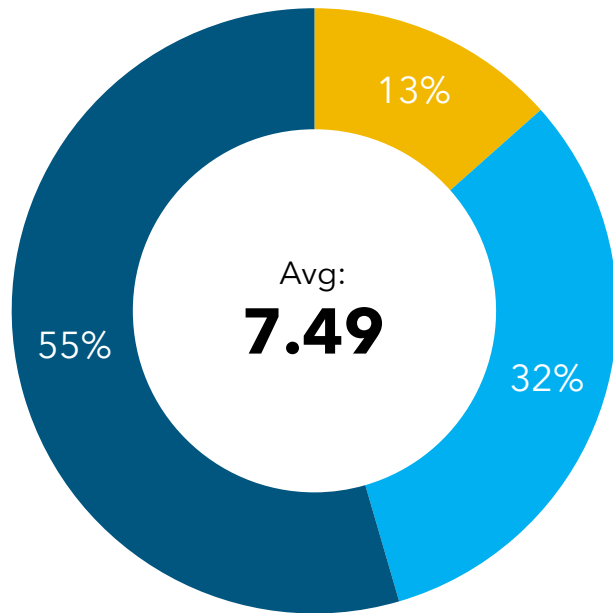


A photograph of the Golden Gate Bridge in San Francisco, California, viewed from an elevated angle. The bridge's iconic orange-red towers and suspension cables are prominent. The bridge spans across a large body of water, with a thick layer of white fog or mist filling the lower portion of the scene. In the background, rolling hills and distant city buildings are visible under a clear, light blue sky. A semi-transparent blue rectangular box is overlaid on the left side of the image, containing white text.

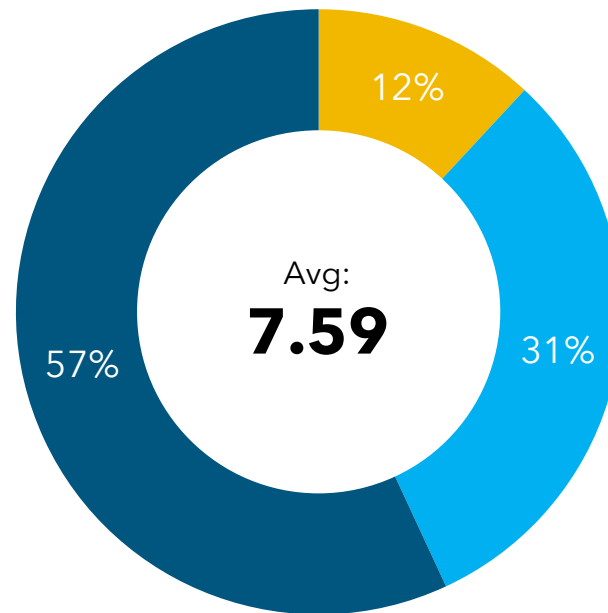
California Resident Sentiment on Travel and Tourism

Residents' Overall Perception of the Travel & Tourism Industry within Their State

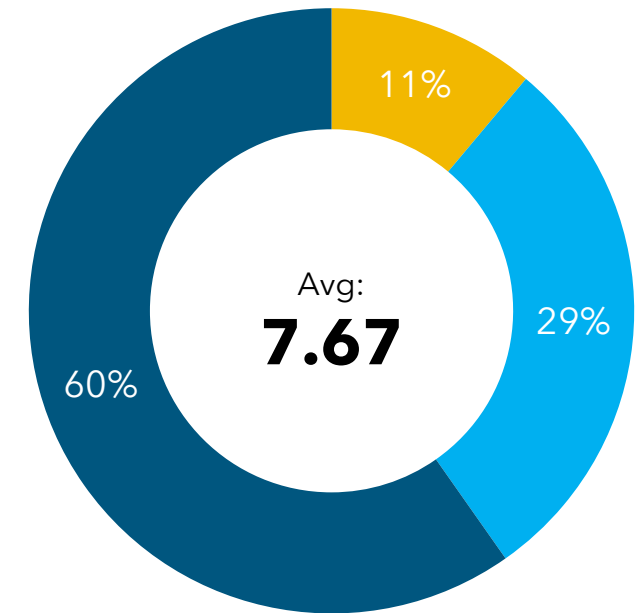
National



Pacific Division

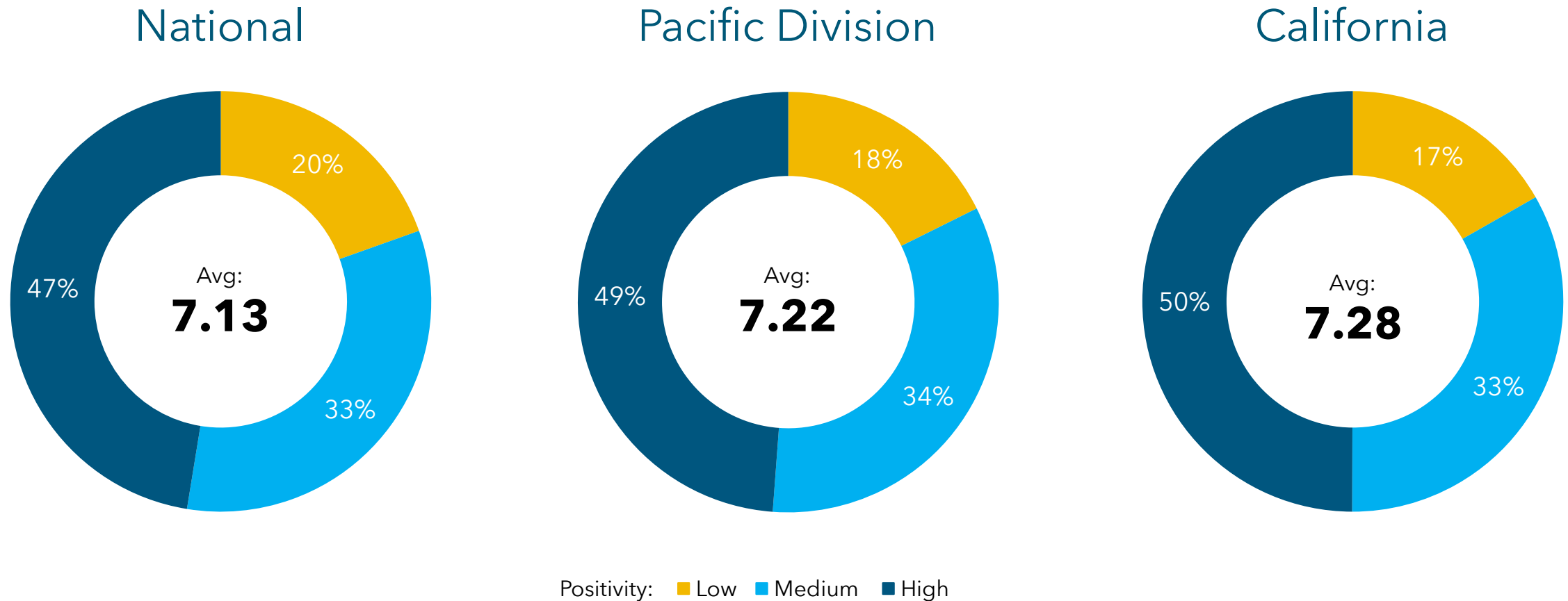


California



Positivity: ■ Low ■ Medium ■ High

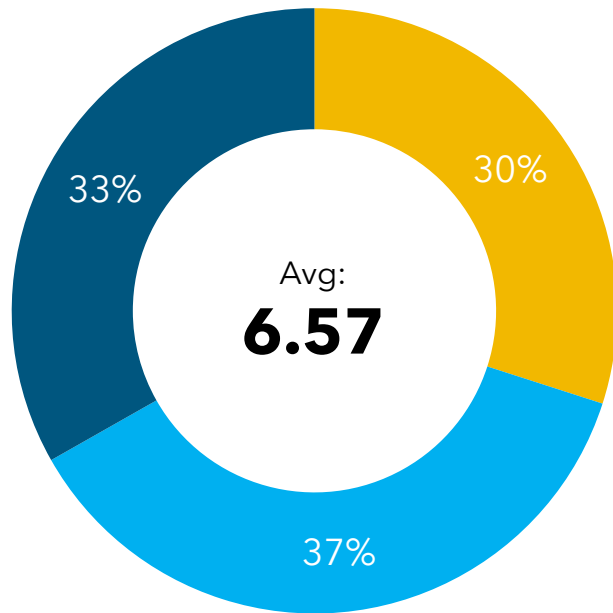
Residents' Overall Perception of the Travel & Tourism Industry in Their Local Area



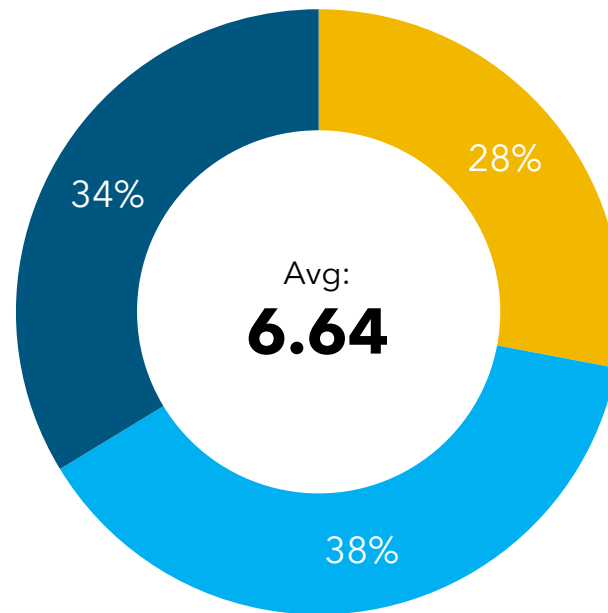
Note: figures reflect residents view of the travel & tourism industry in their local area where they live day to day. This local level measure differs from the state level measure on p. 5, which reflects their view of the industry within their respective state

Residents' Perception of Tourism's Overall Impact on Them and Their Family

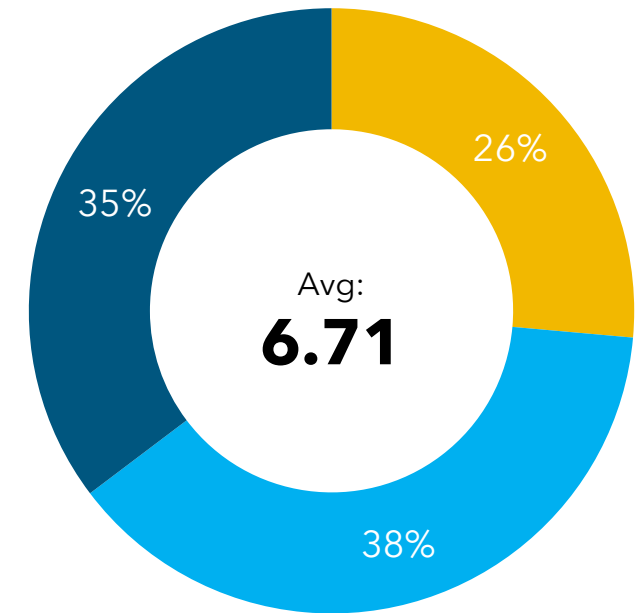
National



Pacific Division



California

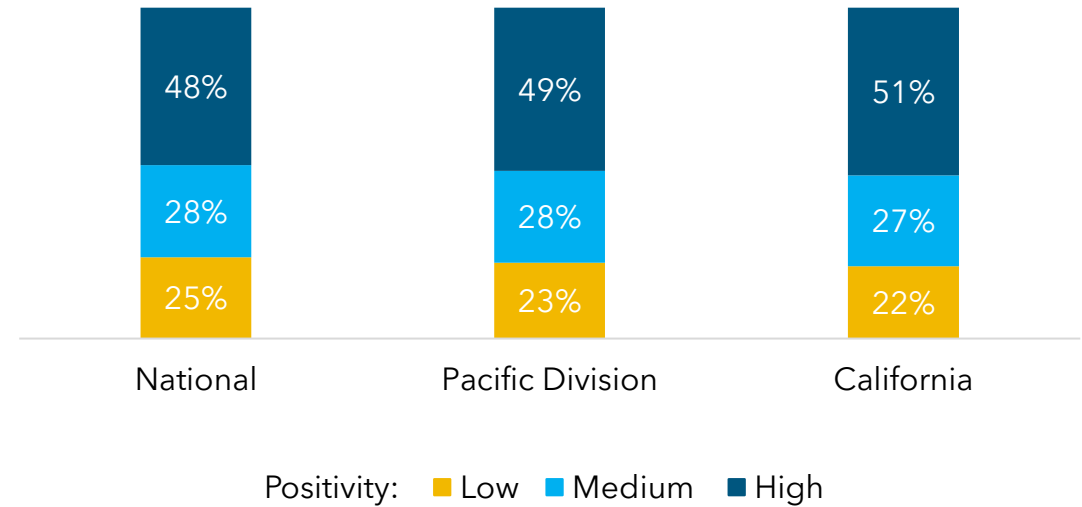


Positivity: ■ Low ■ Medium ■ High

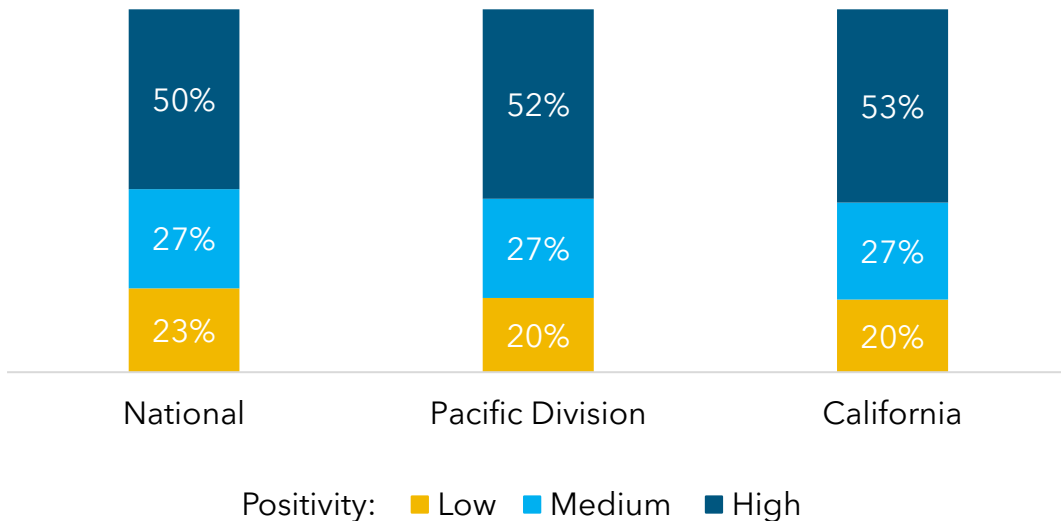
Tourism Economy

Residents recognize that tourism has a positive impact on generating tax revenue for the local economy

Generating Local Tax Revenue



Creation of Jobs and Employment Opportunities



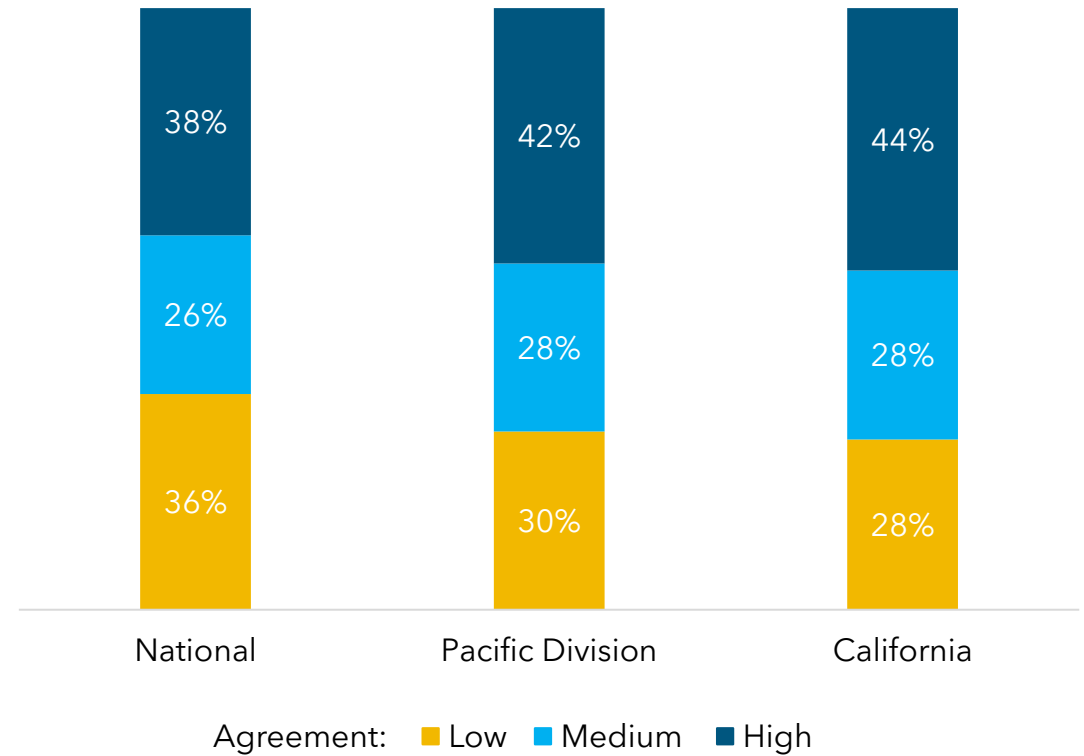
Jobs and Employment

Residents view the tourism industry as having a positive impact on the creation of jobs and employment opportunities

Impact on Increased Cost of Living

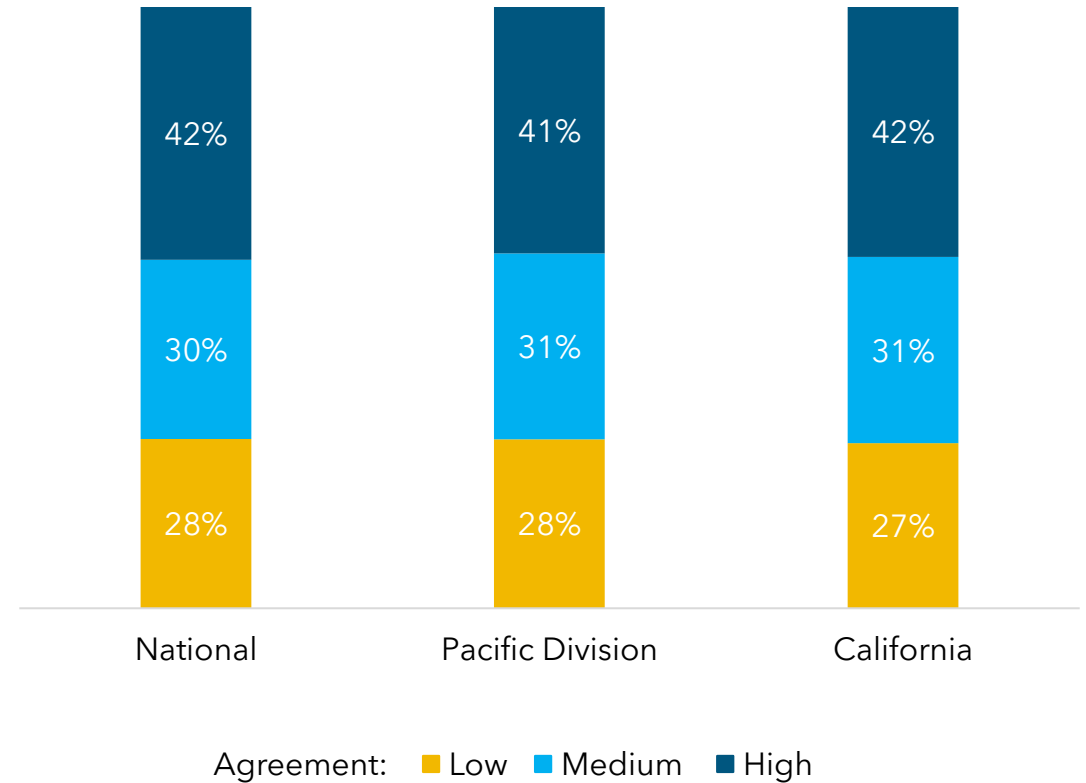
Residents are aware that tourism can have negative impacts on their area.

Many agree that tourism contributes to increased cost of living.



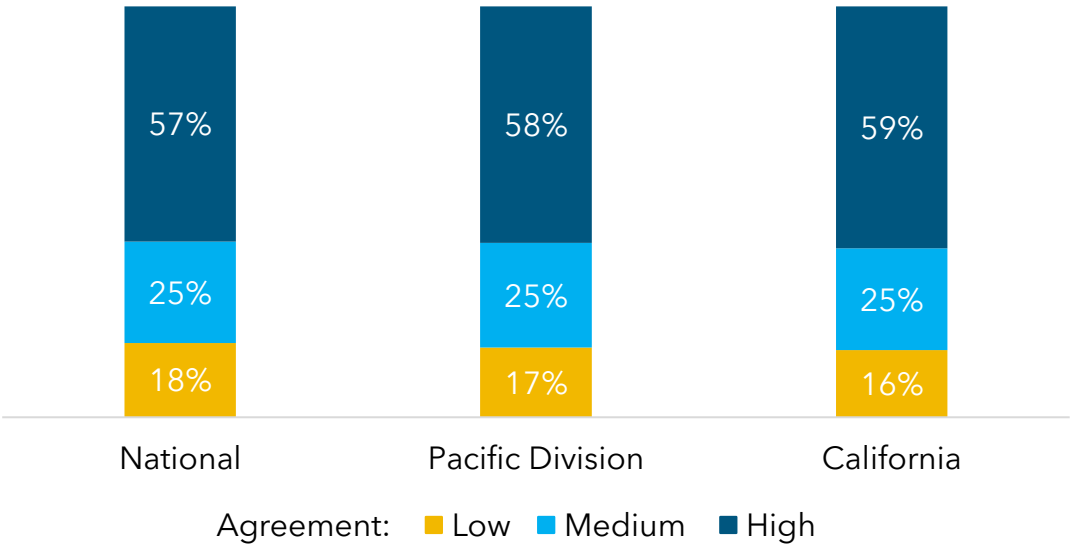
Quality of Life

Residents view tourism as an industry that enhances their quality of life

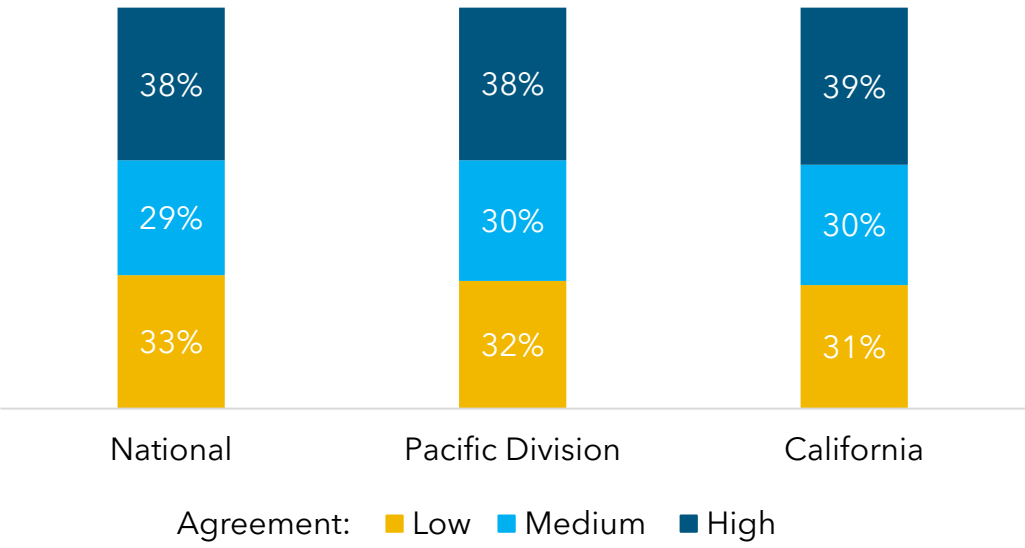


Quality of Life Impacts

Creates Shopping, Dining, and Entertainment Opportunities

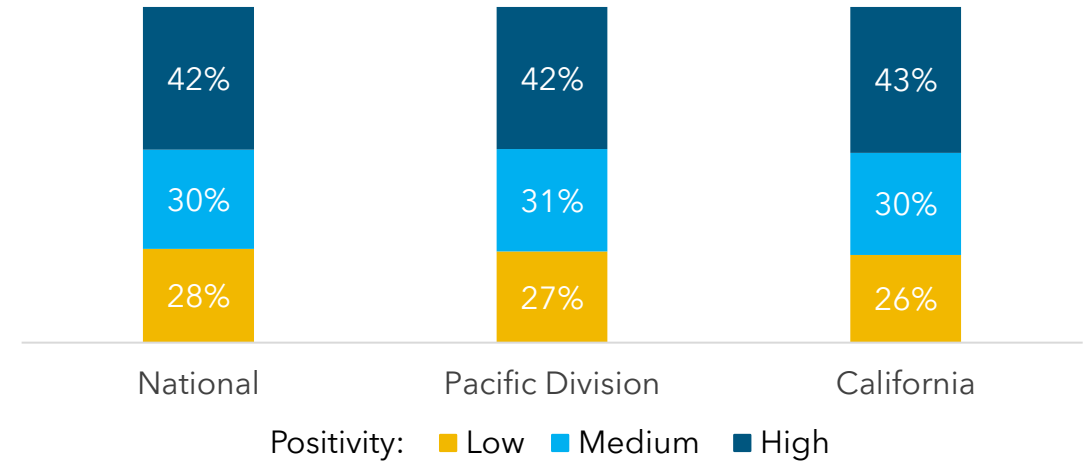


Contributes to Improved Living Standards

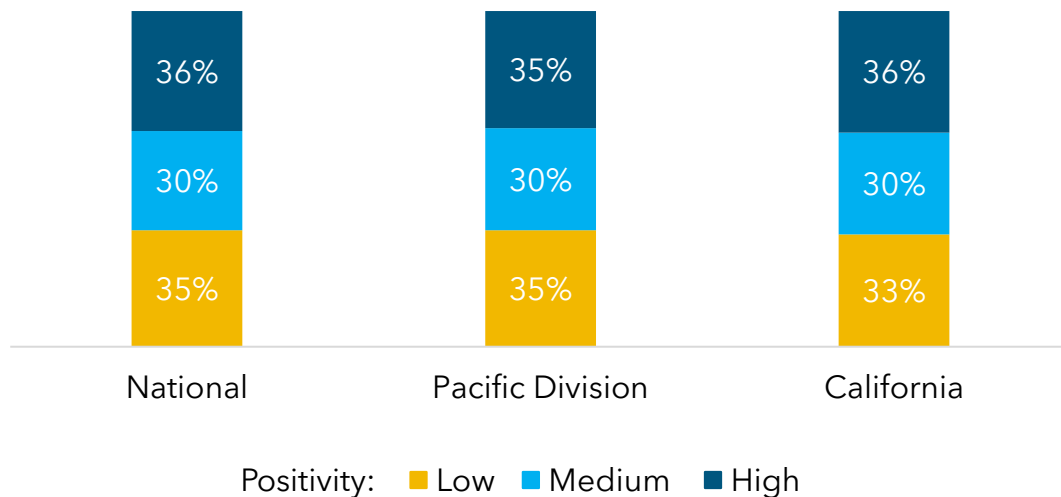


Tourism Impacts on Funding Community Venues, Schools, and Infrastructure

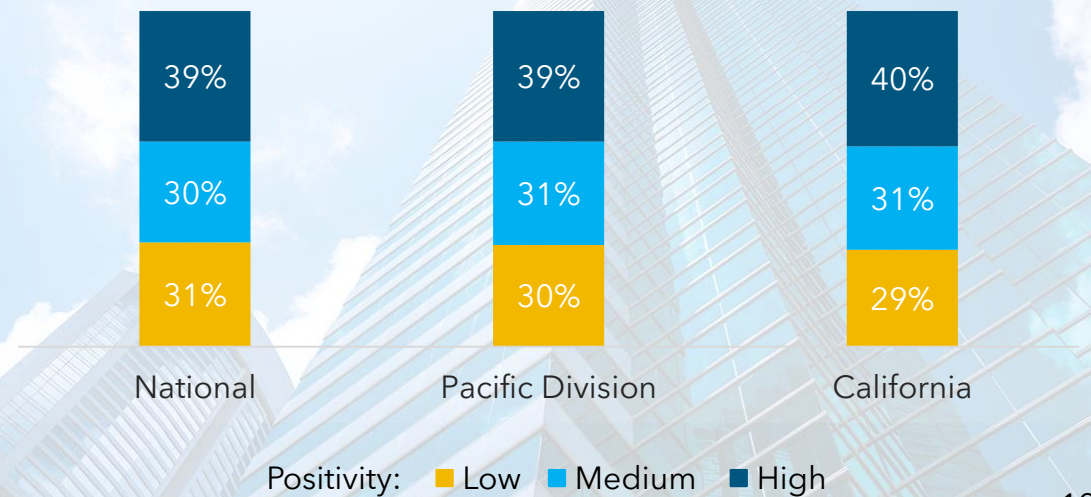
Funding New Community Venues



Generating Funding for Schools



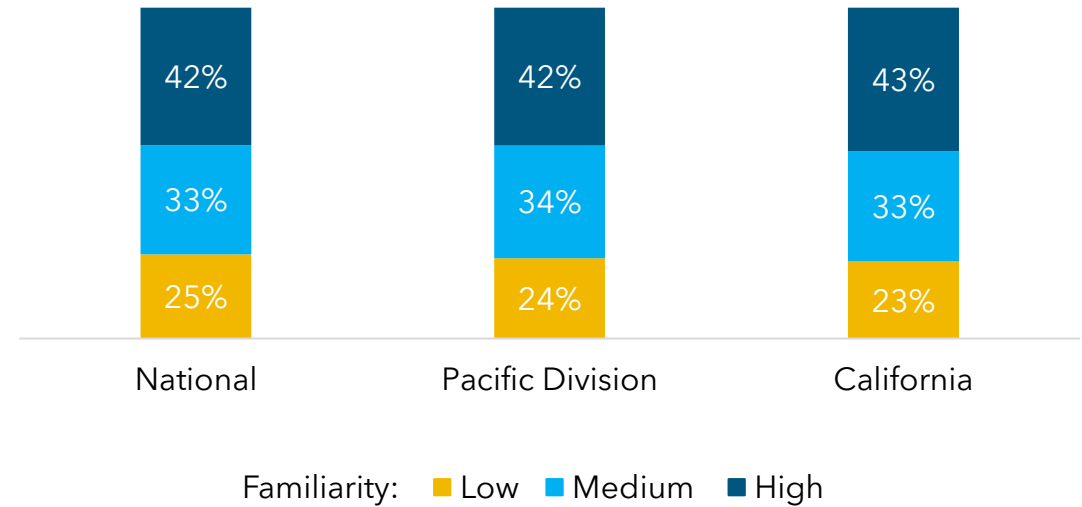
Funding Infrastructure Projects



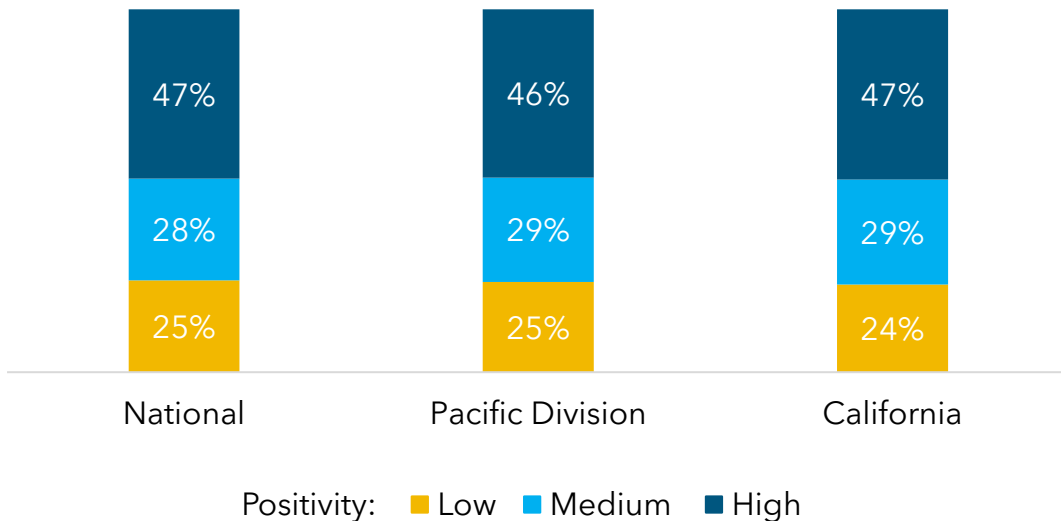
Tourism Benefits Familiarity

While residents recognize the benefits of tourism, they also seek to minimize the negative impacts of the industry on their quality of life.

Familiarity with Tourism Benefits



Tourism Benefits Outweigh the Negatives



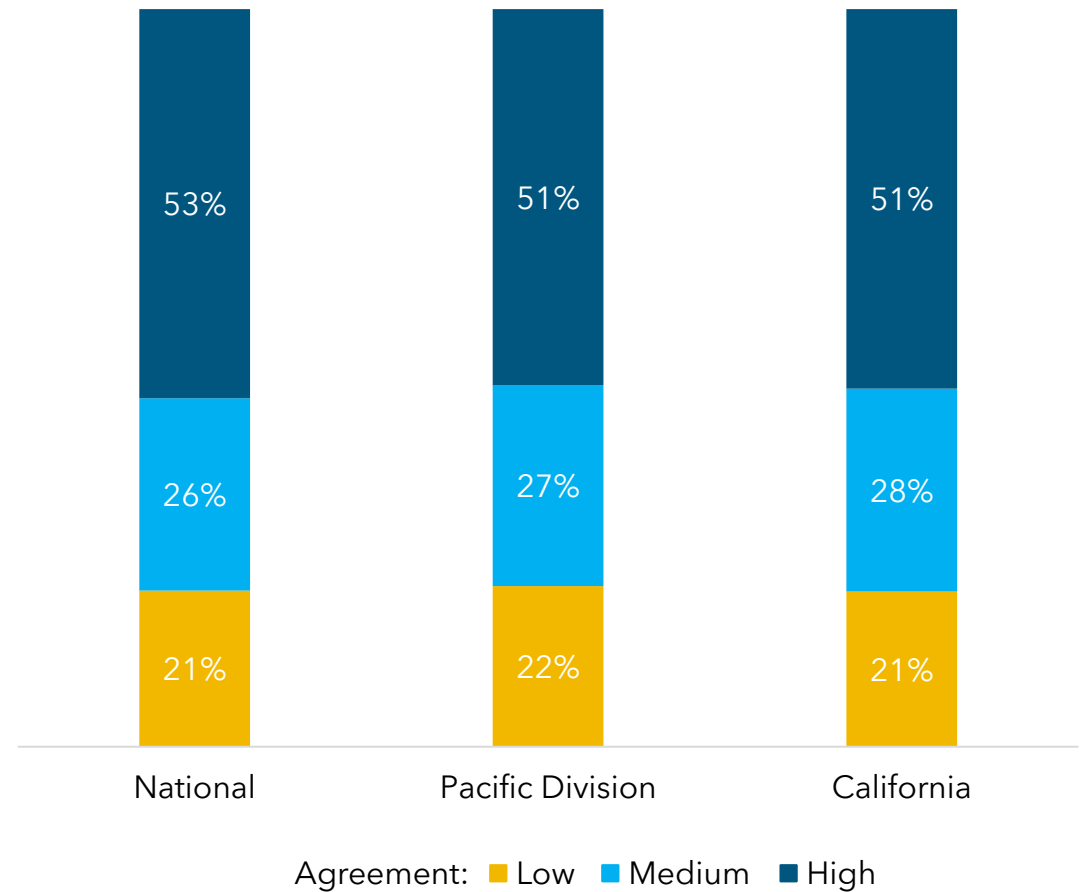
Tourism Benefits Outweigh Negatives

It's all about balance and reaching a desired state where the trade offs of tourism create more benefits than problems.

Tourism Promotion

Residents understand and support continued tourism promotion.

Most residents agree that tourism should be actively promoted by their local government

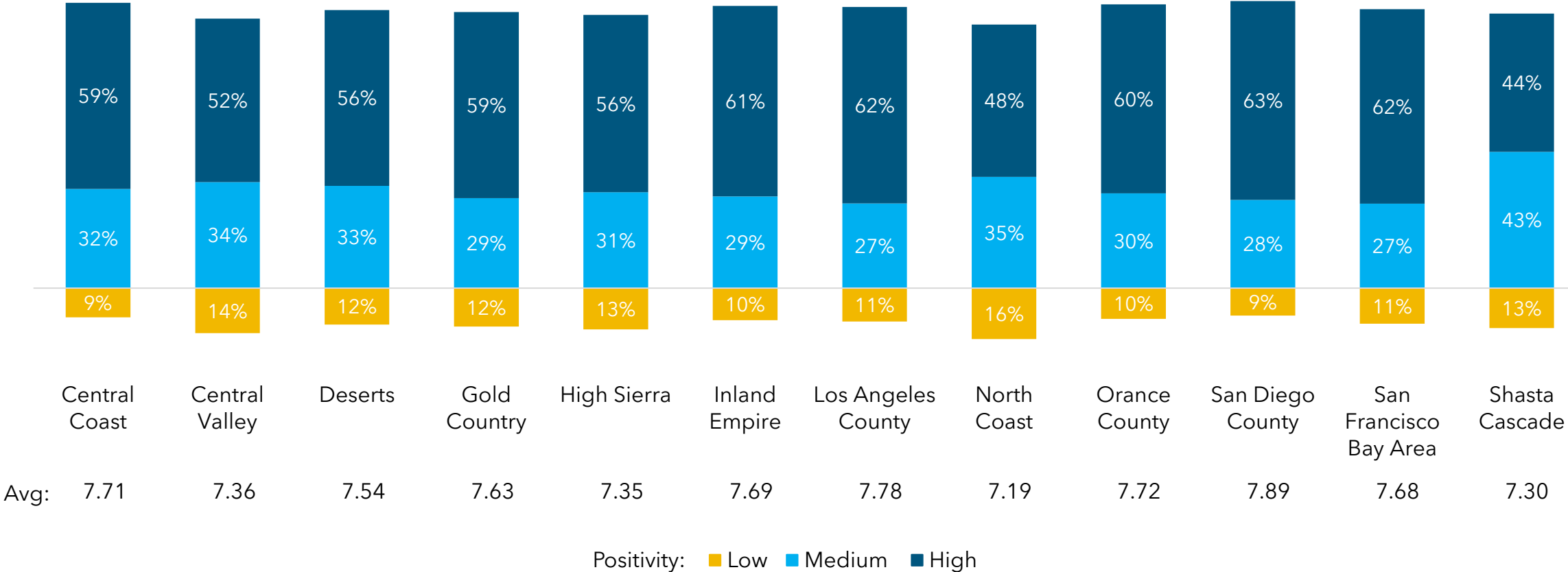


Resident Sentiment by California Region



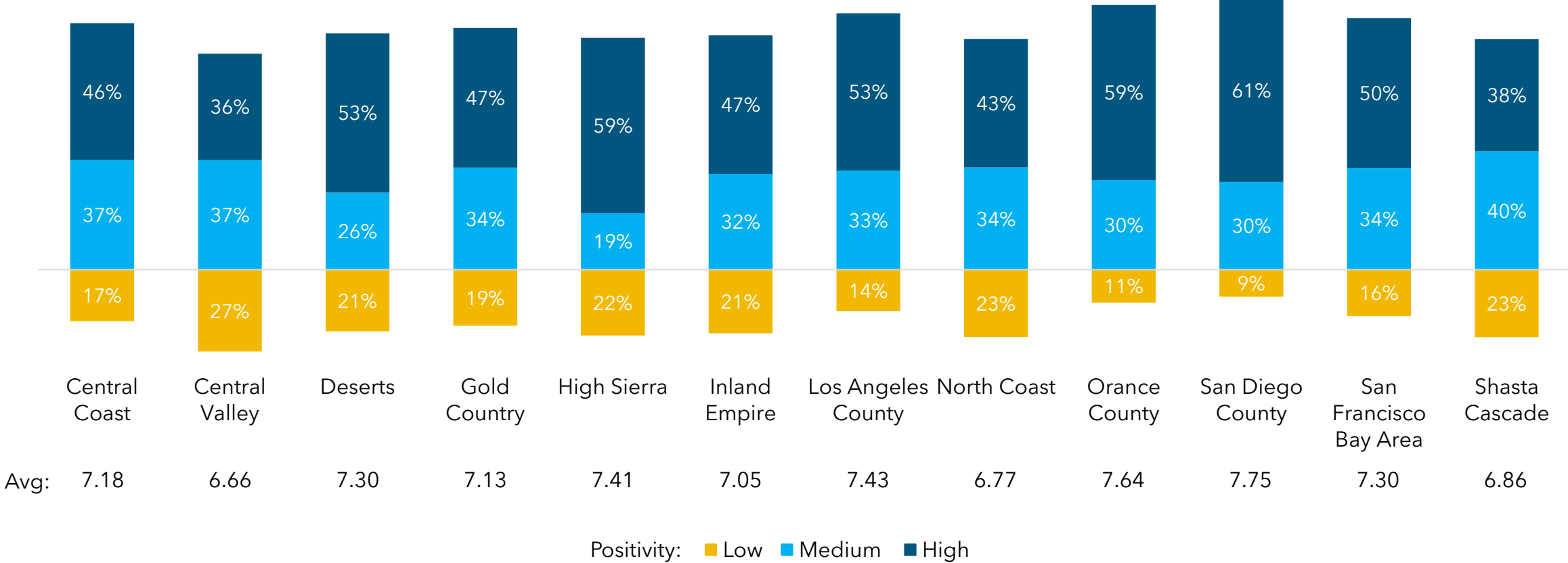
Residents' Overall Perception of Travel & Tourism Industry in Their State

California Regions



Residents' Overall Perception of Travel & Tourism Industry in Local Area

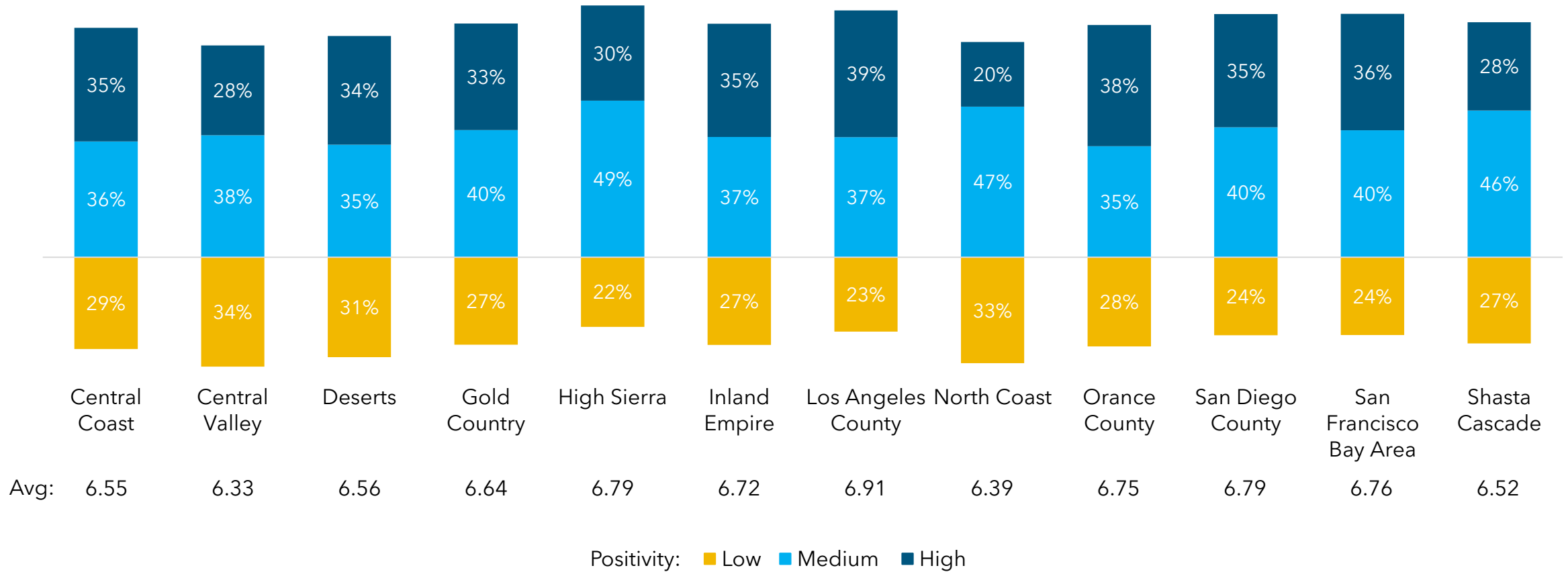
California Regions



Note: figures reflect residents view of the travel & tourism industry in their local area where they live day to day. This local level measure differs from the state level measure on p. 5, which reflects their view of the industry within their respective state

Residents' Perception of Tourism's Overall Impact on Them & Their Family

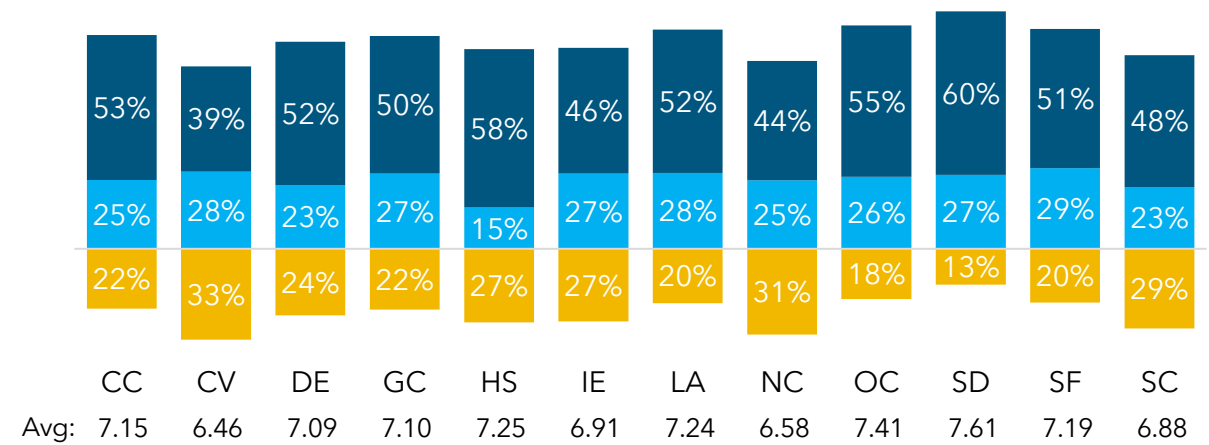
California Regions



Tourism Impact on Economy, Cost of Living, and Employment California Regions

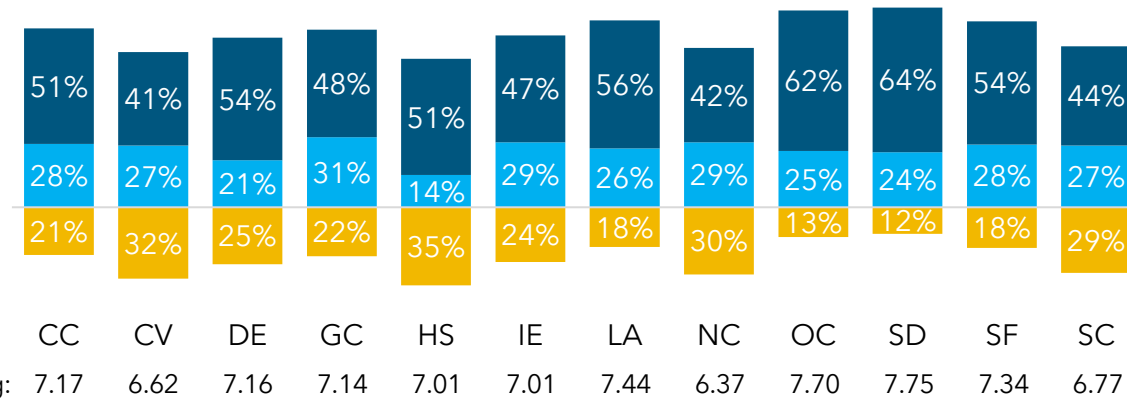
Generating Local Tax Revenue

Positivity: ■ Low ■ Medium ■ High



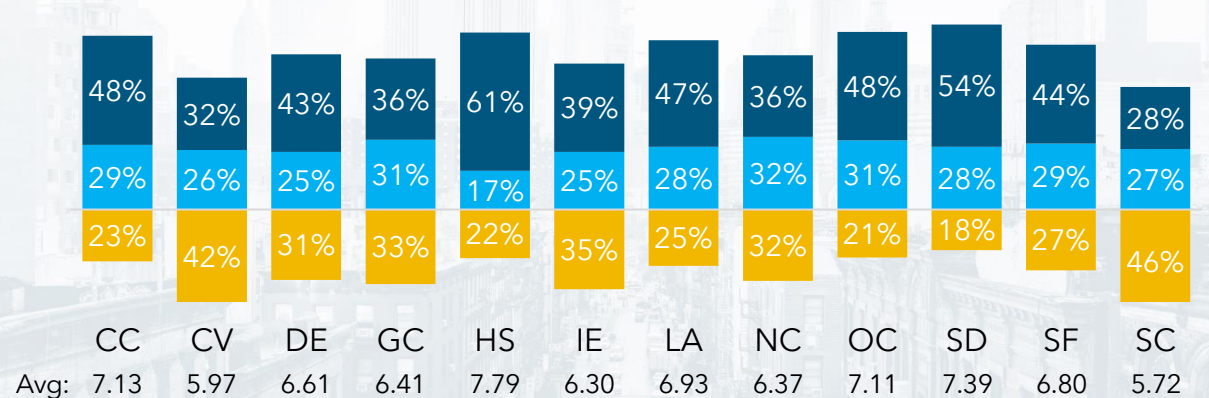
Creation of Jobs and Employment Opportunities

Positivity: ■ Low ■ Medium ■ High



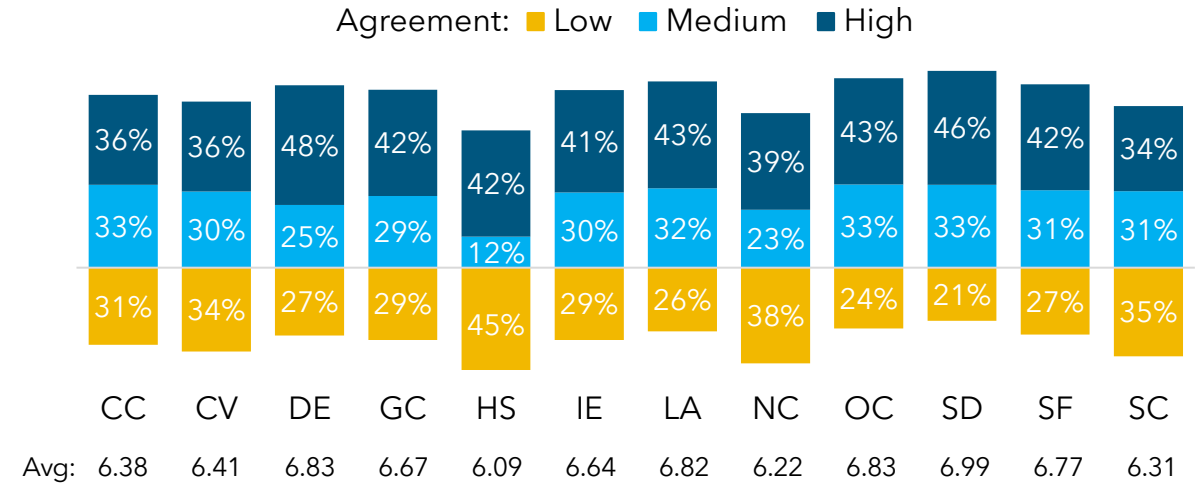
Contributes to Increased Cost of Living

Agreement: ■ Low ■ Medium ■ High



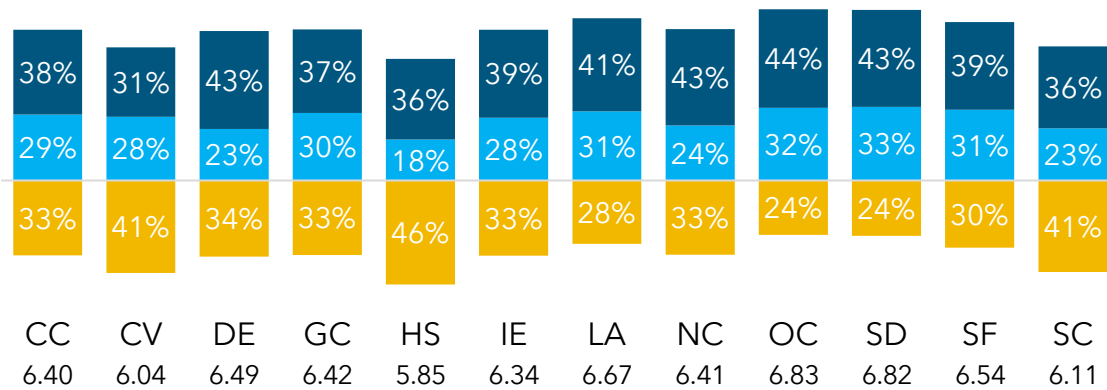
Quality of Life Perceptions California Regions

Tourism Enhances Local Residents' Quality of Life



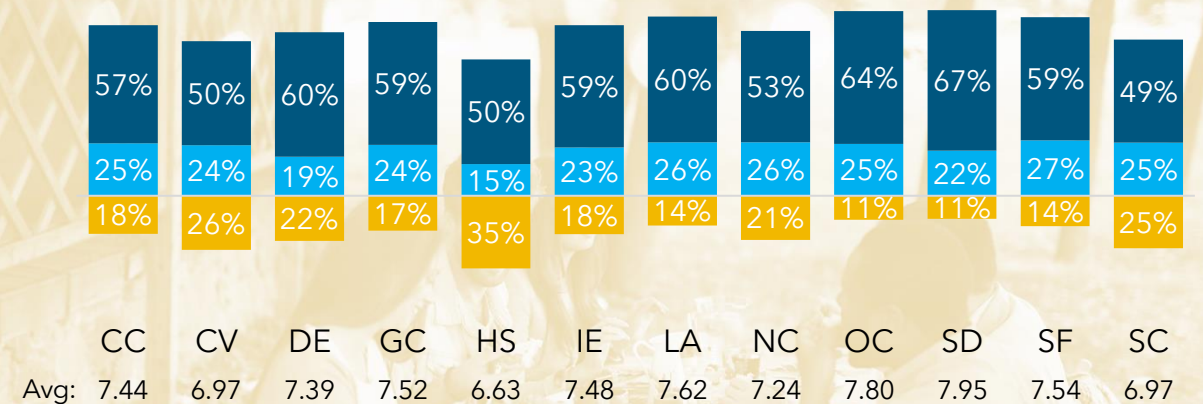
Contributes to Improved Living Standards

Agreement: Low Medium High



Creates Shopping, Dining, and Entertainment Opportunities

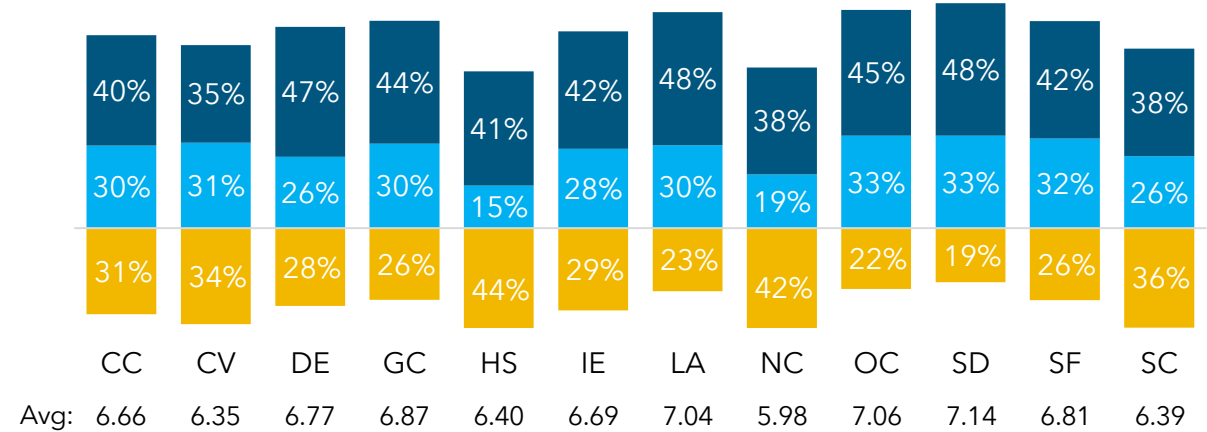
Agreement: Low Medium High



Tourism Impact on Funding Community Venues, Schools, and Infrastructure California Regions

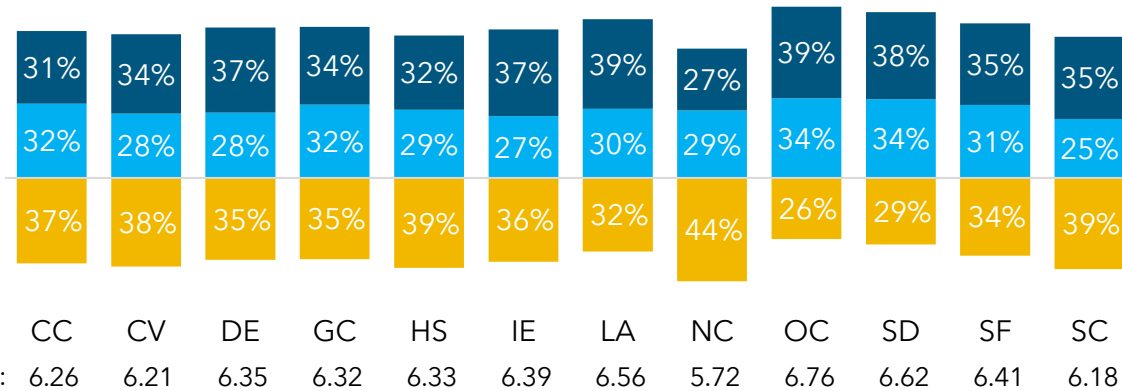
Funding New Community Venues

Positivity: Low Medium High



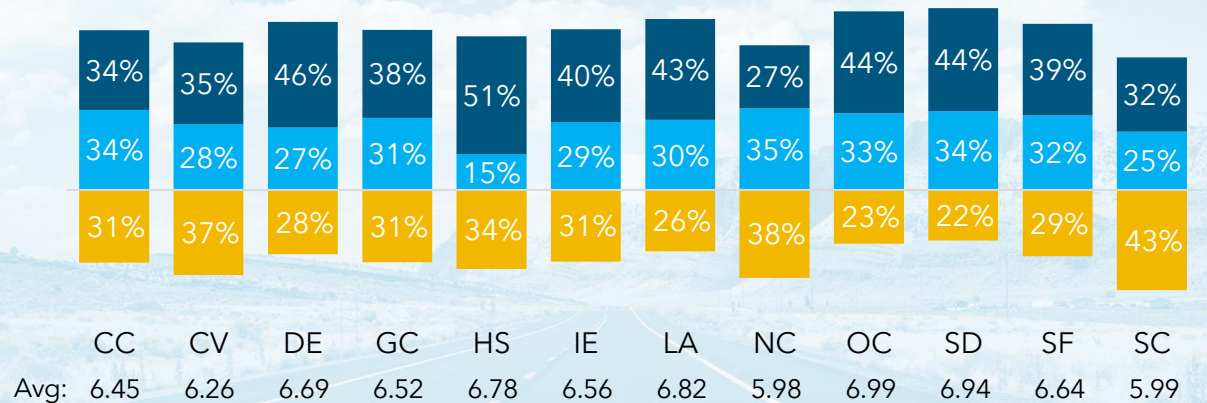
Generating Funding for Schools

Positivity: Low Medium High



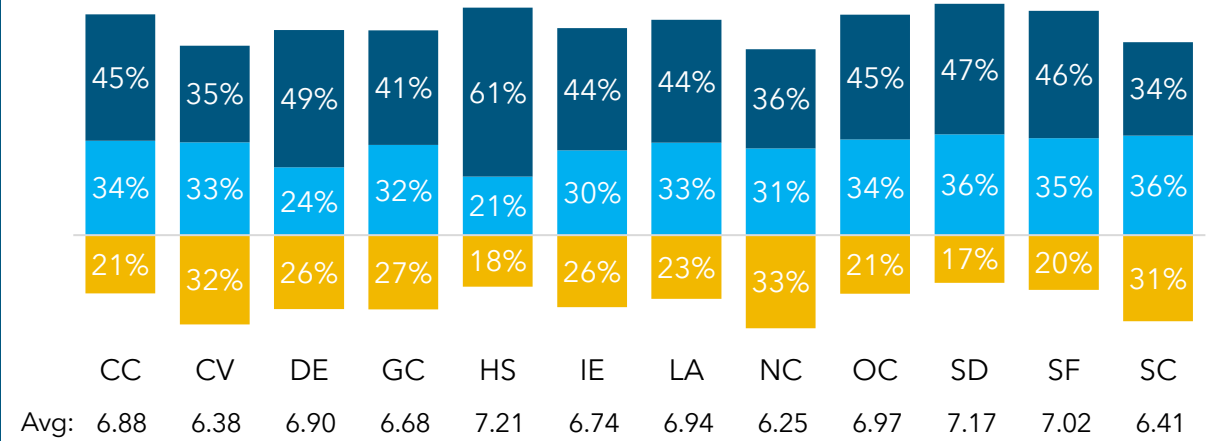
Funding Infrastructure Projects

Positivity: Low Medium High



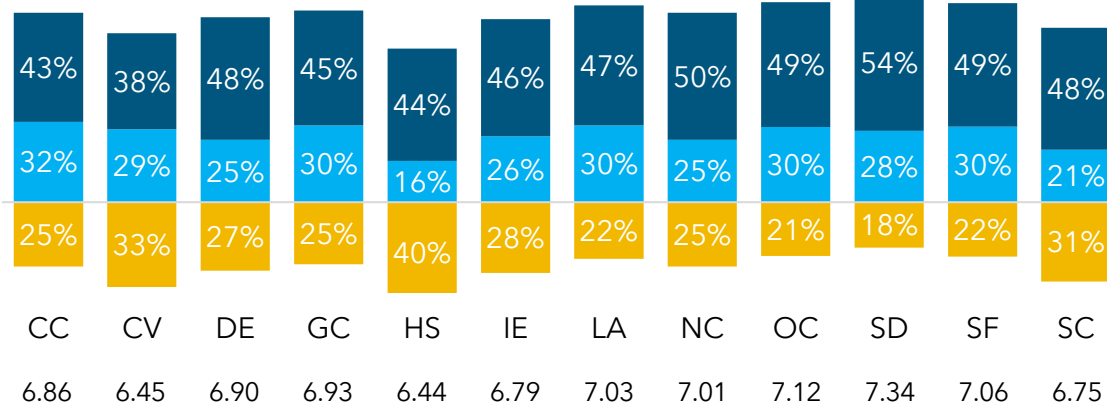
Tourism Benefits and Promotion California Regions

Familiarity with Tourism Benefits
Familiarity: Low Medium High



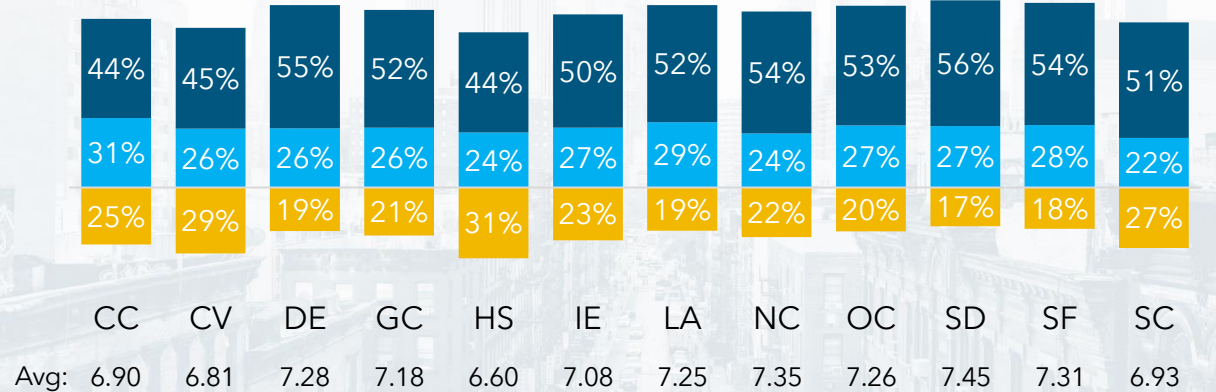
Benefits of Tourism Outweigh the Negatives

Positivity: Low Medium High



Local Government Should Actively Promote Tourism

Agreement: Low Medium High



Who Are California's Positives and Negatives



Identification of Positives vs Negatives

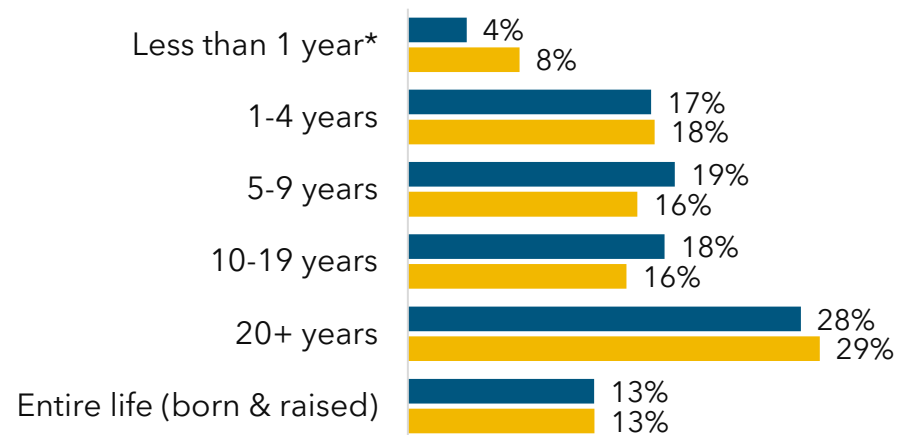
53%

California residents who traveled in the past year are positive towards travel and tourism*

35%

California residents who have not traveled in the past year are positive towards travel and tourism*

Length Lived in Area

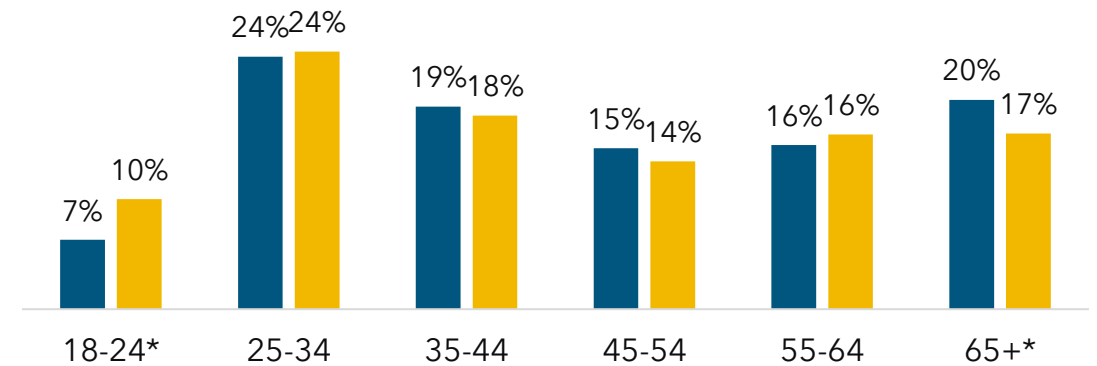


*Indicates statistically significant differences

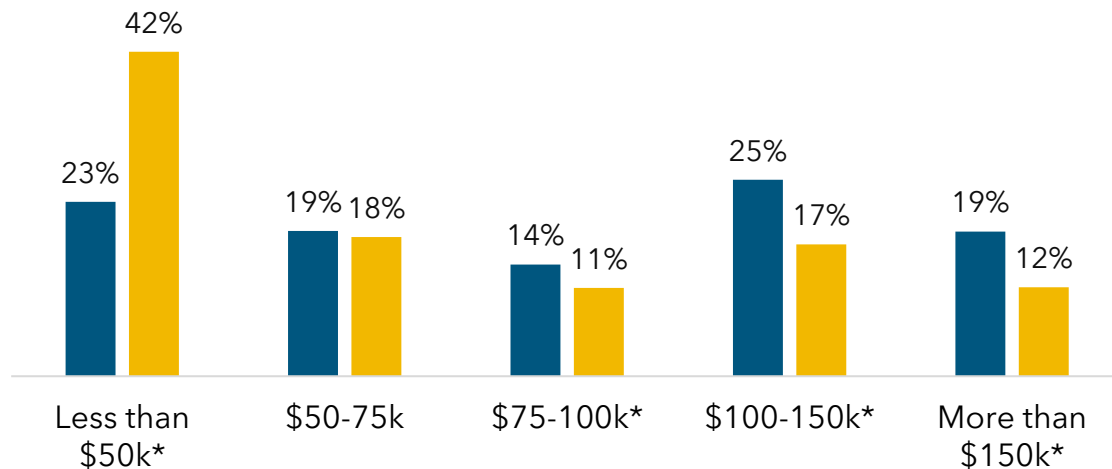


Identification of Positives vs Negatives

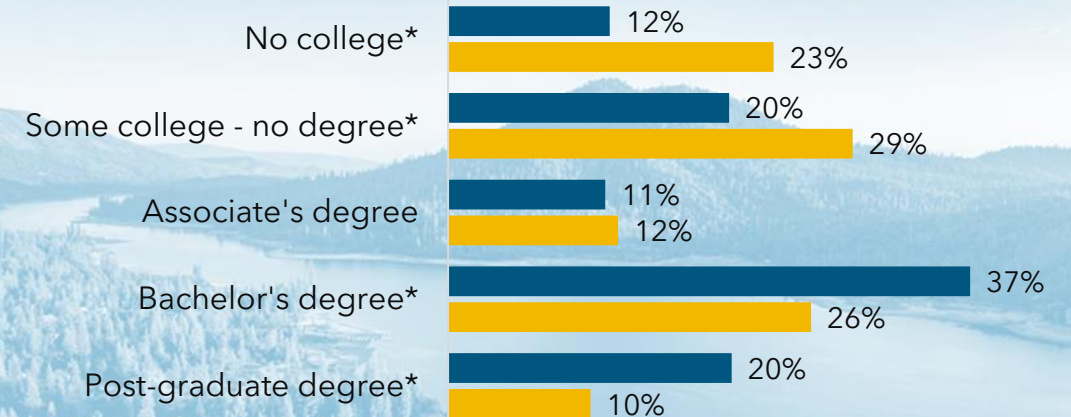
Age



Income



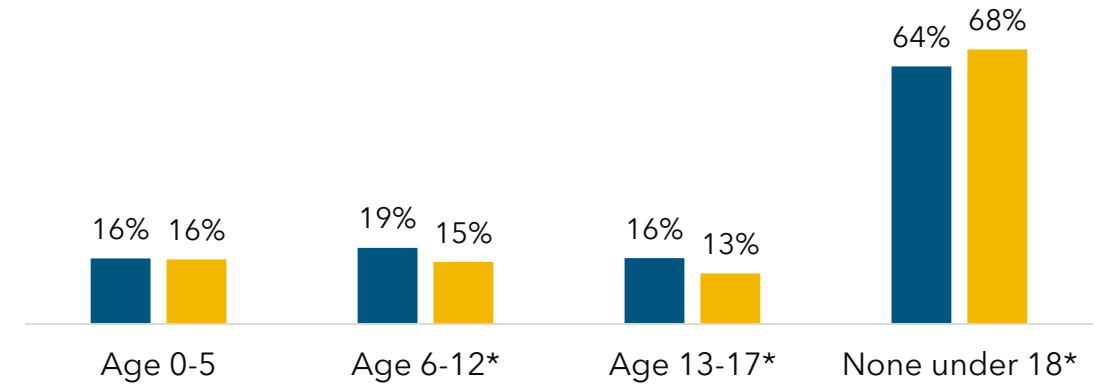
Education



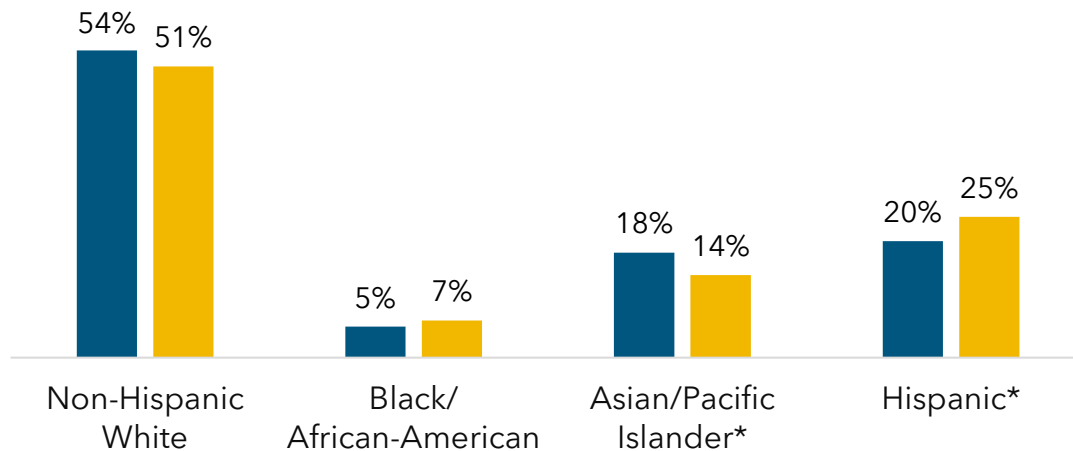
*Indicates statistically significant differences

Identification of Positives vs Negatives

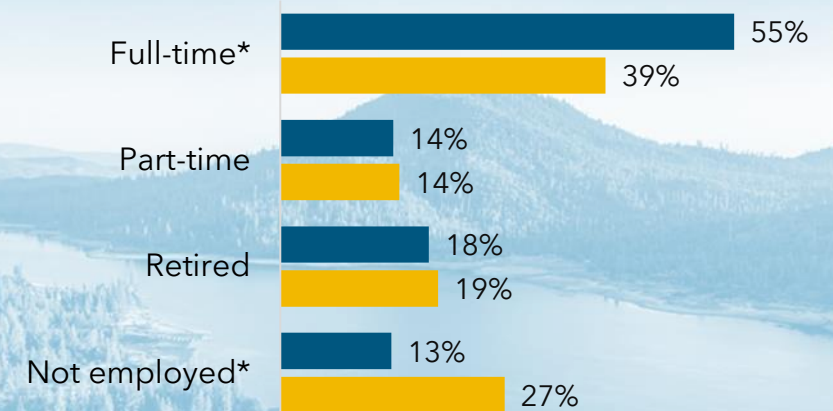
Children in Household



Ethnicity/Hispanic Origin



Employment Status



*Indicates statistically significant differences

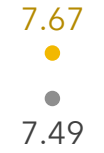
Trends in Resident Sentiment on Travel & Tourism



Trends in Residents' Overall Perception of the Travel & Tourism Industry...

within Their State
(average positivity rating)

—● National —● California



CY 2022 CY 2023

within Their Local Area
(average positivity rating)

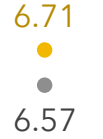
—● National —● California



CY 2022 CY 2023

Impact on Them & Their Family
(average positivity rating)

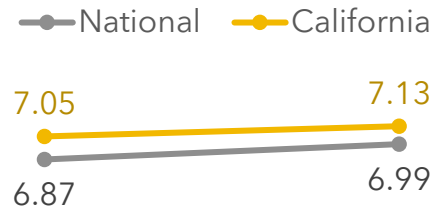
—● National —● California



CY 2022 CY 2023

Trends in Resident Sentiment on Travel & Tourism

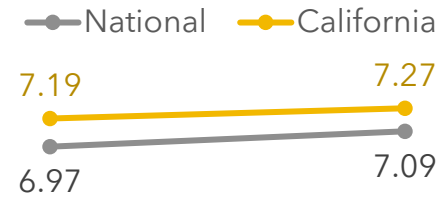
Impact on Generating Local Tax Revenue
(average positivity)



CY 2022

CY 2023

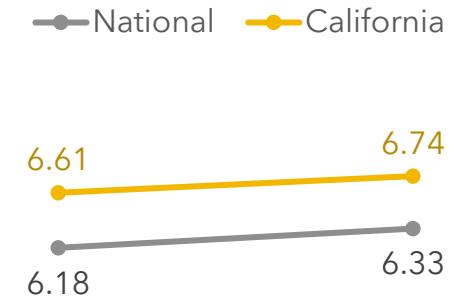
Impact on Creation of Jobs and Employment
(average positivity)



CY 2022

CY 2023

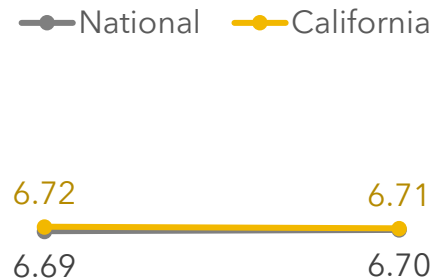
Contributes to Increased Cost of Living
(average agreement)



CY 2022

CY 2023

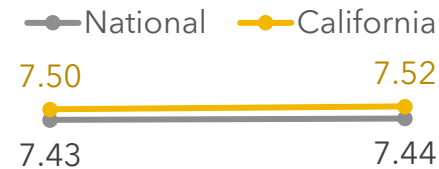
Enhances Residents' Quality of Life
(average agreement)



CY 2022

CY 2023

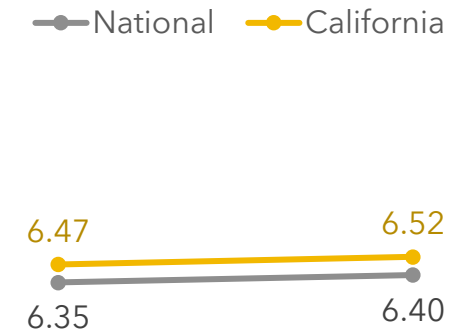
Creates Shopping, Dining, and Entertainment
(average agreement)



CY 2022

CY 2023

Contributes to Improved Living Standards
(average agreement)



CY 2022

CY 2023

Trends in Resident Sentiment on Travel & Tourism

Impact on Funding New Community Venues
(average positivity)

— National — California



CY 2022

CY 2023

Impact on Generating Funding for Schools
(average positivity)

— National — California



CY 2022

CY 2023

Impact Funding Infrastructure Projects
(average positivity)

— National — California

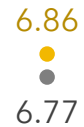


CY 2022

CY 2023

Familiarity with Tourism Benefits
(average familiarity)

— National — California



CY 2022

CY 2023

Benefits Outweigh Negatives
(average agreement)

— National — California



CY 2022

CY 2023

Should be Promoted by Local Government
(average agreement)

— National — California



CY 2022

CY 2023