

2020 NATIONAL RESIDENT SENTIMENT - HIGHLIGHTS

Introduction

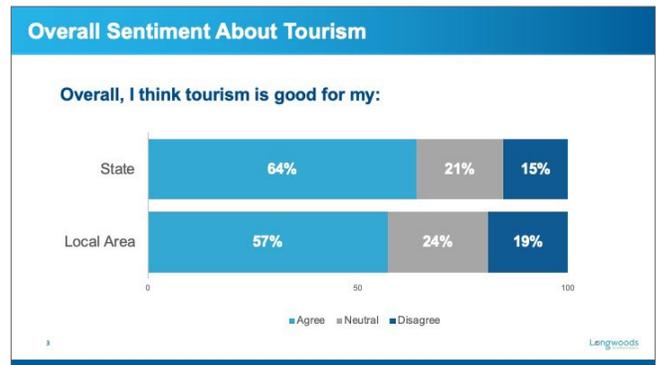
Global travel and tourism have been characterized in recent years by both healthy, even robust, rates of growth, coupled with stark declines brought about by concerns about health and safety during a global pandemic. Over this time the industry has begun to embrace the concept that the local resident is the industry’s most important customer – a vital partner in the development and prosperity of this industry.

As such, resident sentiment has become the new “essential KPI.” The resident will be the traveler who powers tourism’s rebound, the partner at the table to advocate for funding and building new tourism product, the trusted source of vital word of mouth to friends and relatives, and the beneficiary of the financial gains from this vital economic engine.

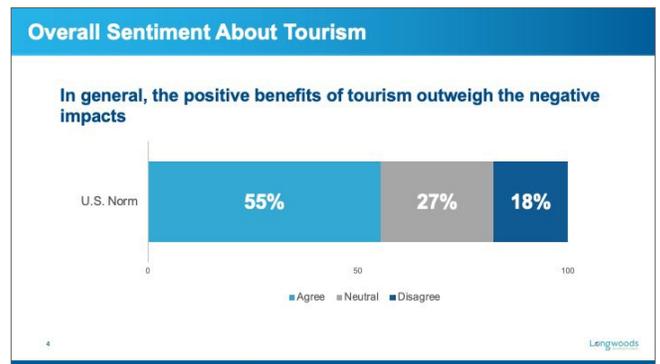
In 2020, Longwoods International fielded the largest National Resident Sentiment Study conducted to date, utilizing a national online consumer research panel of 4,000 adults. The scale and scope of this study make insights available on the regional and generational level for the first time, allowing for both a national benchmark evaluation, as well as evaluations of nuances across the country. In partnership with Destinations International, the results of this National Resident Sentiment Study Towards Tourism are being made available to the tourism industry.

Here are the highlights:

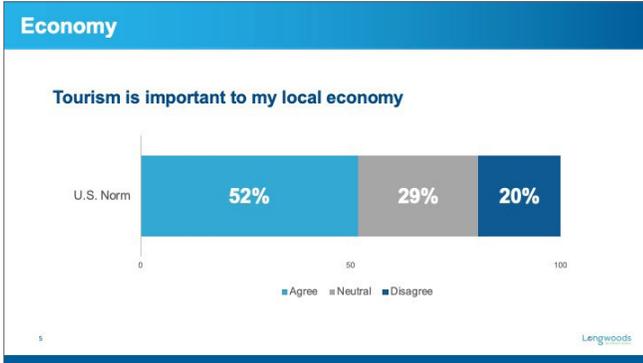
While there exists an opportunity to improve the perceived overall benefit of the industry to communities, the Longwoods survey found that **64% and 57% respectively agree that tourism is good for their state and local areas. These figures go up by at least 20 percentage points in agreement for those who consider themselves informed about tourism.**



And while Americans do believe there are some negatives aspects of tourism, **55% of American residents recognize that, in general, the positives outweigh the negatives of the industry.**

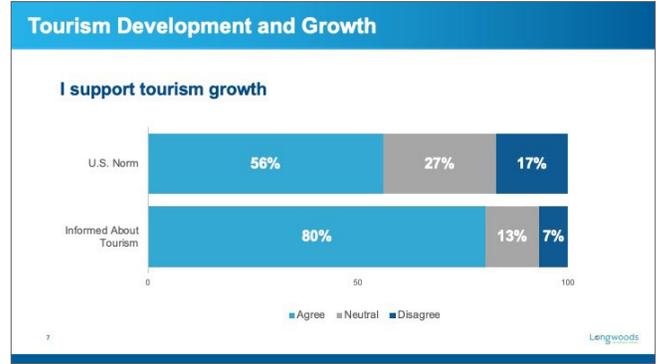


Half of Americans agree that tourism is both important to and encourages investment in their local economy. This level of agreement for the economic benefits goes up to over 70% for those who consider themselves informed about the industry.

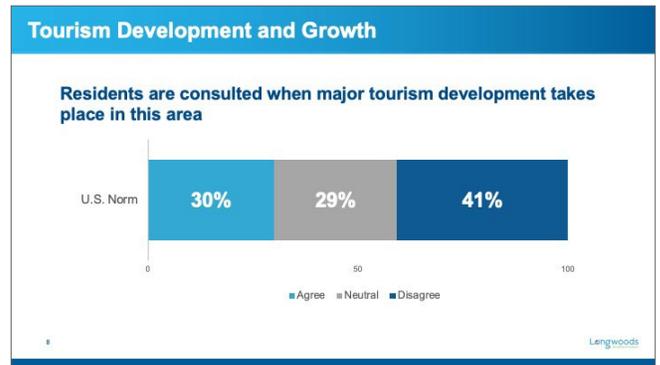


While tourism is seen to have value and provide a contribution to the local economy, there is a perception that most tourism jobs are low-paying and seasonal, with only 21% in disagreement. Further, the majority of Americans either disagree or are neutral that the sales tax paid by visitors compensates for the wear and tear they create on community infrastructure.

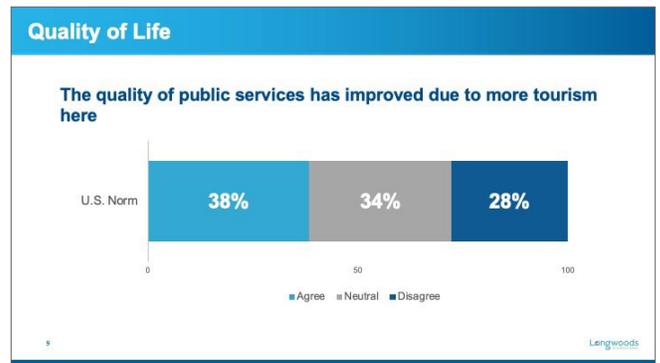
The study found that **over half of Americans support tourism growth (56%) and believe that tourism should be encouraged in their community (55%)**. Only a small percent oppose growth in their community, with opposition being less than 10% for those who consider themselves informed.



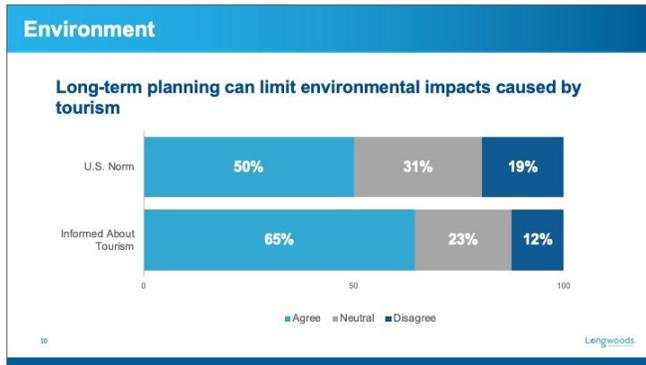
Despite over half of Americans saying they support tourism growth, only **30% of Americans agree that residents are consulted when major tourism development takes place in their area**. When residents consider themselves informed, the overall support for tourism growth increased by 24 points.



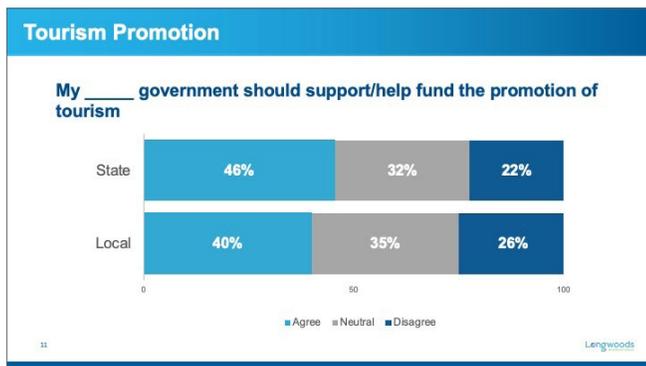
Concerning the impact of tourism on public service improvement, only 38% agree on this topic.



Americans recognize the importance of planning. **Half of Americans agree that long-term planning can limit the environmental impacts caused by tourism.**



46% of Americans are in agreement with their state government and 40% are in agreement with local government supporting and helping fund the promotion of tourism. When Americans are informed about tourism this percentage increases, with over half of informed residents in support the use of state and local government funding for tourism promotion.



The power of information is vital for the support and development of tourism in American communities. Open communication about the industry with government officials, at all levels, and the community at large grows an industry understanding and perceived value for travel and tourism as: an economic driver, support for an enhanced quality of life, and overall benefit for the greater good of communities.

Conclusion

- Most Americans agree the benefits of tourism outweigh the negatives.
- While Americans overwhelmingly support tourism growth, there is room to improve their inclusion in the planning process.
- However, even among those informed about the tourism industry, they predominately do not see the industry as a creator of high-paying jobs.
- When residents are informed about travel and tourism, their support for funding, development, and overall growth of the industry increases significantly.
- Residents largely favor government support and funding for tourism promotion, while the opportunity does exist to grow the level of this support.

Key takeaways from these conclusions:

- Create regular and on-going resident engagement, never assume residents understand the value of tourism to the community and what you do as part of the industry.
- In addition to creating brand ambassadors, it is important to create different messaging tactics with both informed and uninformed residents on tourism.
- Keep residents informed and turn locals into “Brand Ambassadors” so they are both your industry advocate and your strongest marketer.
- Treat your resident as your first customer, the front door to tourism, industry advocate and beneficiary of the travel industry’s value to their community.

In partnership with Destinations International, this study will be repeated on an annual basis, allowing resident sentiment data on current and emerging issues to be monitored and shared with its membership and other stakeholders. We look forward to providing these ongoing updates.

To learn more visit:

- longwoods-intl.com/resident-sentiment-research
- destinationsinternational.org/nationalresident-sentiment-white-paper