

U.S. INDUSTRY BRIEF

2023 NATIONAL RESIDENT SENTIMENT

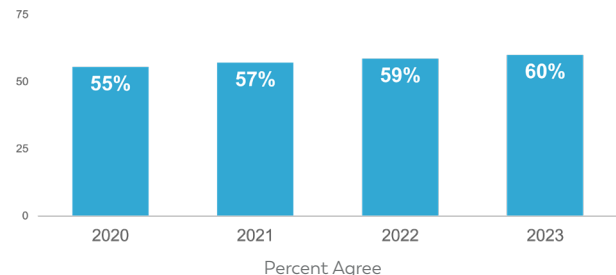
Introduction

Each year, Longwoods International conducts a national study exploring Americans' perceptions of tourism, its impacts, and the industry's performance in destination development, stewardship, and marketing. A representative sample of 4,000 Americans (1,000 from each U.S. Census region) were surveyed in July 2023. This year's results provide both promising news as well as opportunities for improvement and further advocacy.

Overall, Americans continue to recognize the value of tourism and their support for tourism remains strong. Over half of Americans agree that overall, tourism is good for their local area (61%) and, more importantly, they want tourism to be important in their local area (55%). They also recognize that their local area benefits from a strong tourism industry, with half (51%) agreeing with this sentiment. We see similar positive levels of support for tourism development and growth. Six in ten Americans (62%) support tourism growth, and they believe tourism should be encouraged in their area.

Americans recognize that tourism has both positive and negative impacts, but promisingly, six in ten (60%) agree that in general, the positive benefits of tourism outweigh the negative impacts. This has incrementally increased each year since 2020, when 55% of Americans agreed with this sentiment.

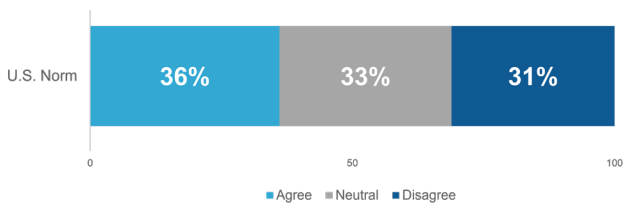
In general, the positive benefits of tourism outweigh the negative impacts



As demonstrated in Destinations International's landmark report, *Destination Promotion: A Catalyst for Community Vitality*, destination organizations are not only responsible for developing a place where people want to visit but, in doing so, are also creating a place where people want to live, work, and invest. Research from this year's national study further supports this argument. Half of Americans agree that tourism attracts both new residents (50%) and businesses (52%) to their area.

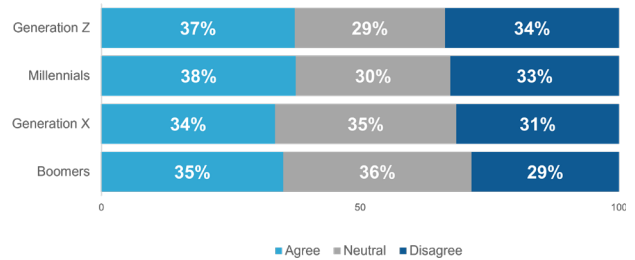
An important aspect of demonstrating our ability to be a catalyst for community vitality involves destination stewardship. With destination stewardship becoming an increasingly important priority for destination organizations, it is important to understand how residents view these efforts. This year, respondents were asked their level of agreement with the statement: "My local government is doing a good job balancing resident quality of life and visitor satisfaction." Less than four in ten (36%) agreed with this statement, with a third (33%) reporting neutral sentiments.

My local government is doing a good job balancing resident quality of life and visitor satisfaction



This neutral category suggests a significant opportunity for destination organizations to communicate their stewardship efforts as a large portion of the population have not yet formed a strong opinion on this topic. Furthermore, while older adults tend to report more positive sentiments of tourism than younger generations, residents' perceptions of their local governments' performance in balancing resident quality of life and visitor satisfaction are similar for all generations. Across the board, we need to be communicating our destination stewardship efforts and highlighting our industry's contributions to residents' quality of life, their local economy, and the environment.

My local government is doing a good job balancing resident quality of life and visitor satisfaction

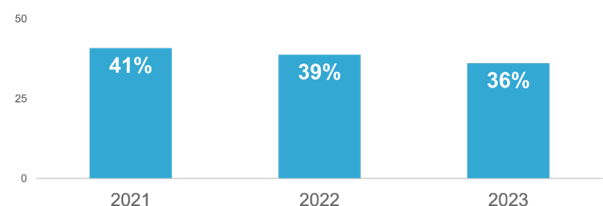


When considering residents' quality of life, results show that nearly half (45%) recognize they have more recreational opportunities (places to go and things to do) available to them because of tourism. Many Americans also agree their dining and shopping opportunities are better in their area due to tourism (48% and 43%, respectively).

Americans are also very much aware of the economic benefits tourism brings to their communities. Half of Americans recognize that tourism is important (54%) and encourages investment in their local economy (53%). Despite these promising findings, when asked about the personal economic benefits of tourism, only about a quarter of Americans (28%) agreed that their household standard of living is higher because of the money tourists spend in their community.

While results indicate that tourism's contributions to residents' quality of life and the local economy is generally understood and recognized, there are opportunities to better demonstrate our industry's commitment to environmental sustainability. Less than four in ten Americans (36%) agree that the tourism industry values sustainability and natural resources, a five-point decline since 2021 (41%).

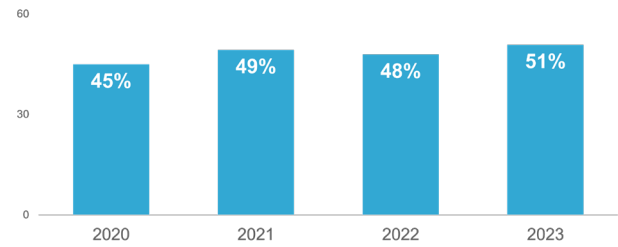
The tourism industry values sustainability and our natural resources



Despite this declining perception, Americans still recognize that tourism has the potential to benefit the environment. Four in ten agreed tourism is a good alternative to more environmentally damaging development (42%) and can help the environment as local governments and residents seek to protect sensitive and scenic areas (41%). Residents see the potential for tourism to positively impact the environment but are reporting a declining belief that our industry values the environment and sustainability.

As destination organizations continue to embrace and prioritize destination stewardship, it is critical that we communicate these efforts to residents. A positive sign for our advocacy efforts is the growing receptiveness to tourism news. Half of Americans (51%) agree that when they come across local tourism news, they're interested in finding out what's happening, a six-point increase from 2020 (45%).

When I come across local tourism news, I'm interested in finding out what's happening



This growing interest in tourism news lends itself well to our advocacy efforts. Americans understand the importance of tourism to their communities, but many are not quite convinced we're doing a good job balancing the needs of both residents and visitors. Focusing on this alignment and informing our communities of our stewardship efforts is critical for their continued support of our industry.



Key Takeaways

1

Highlight destination stewardship efforts. Many Americans do not have a strong opinion on whether governments are doing a good job balancing resident quality of life and visitor satisfaction. This is an opportunity to inform our residents' understanding of our destination stewardship efforts.

2

Demonstrate commitment to environmental sustainability. Americans continue to recognize the positive impacts of tourism to their quality of life and local economy, but perceptions that the tourism industry values sustainability and natural resources have been declining.

3

Continue advocacy efforts. Americans are increasingly interested in local tourism news. Leverage this interest and communicate the industry's contributions to their community's vitality.