

UNITED STATES INDUSTRY BRIEF

2024 NATIONAL RESIDENT SENTIMENT



Introduction

Since 2020, Longwoods International has partnered with Destinations International to conduct an annual study measuring Americans' sentiments towards tourism, its impacts, and their perceptions of tourism employment, destination stewardship, and sustainability. In July 2024, Longwoods International fielded its fifth annual U.S. National Resident Sentiment study, which included a representative sample of 4,000 Americans (1,000 from each U.S. Census region). Overall, results from this year's study are positive and suggest that the industry's destination stewardship and advocacy efforts are making an impact on Americans' sentiment towards tourism.

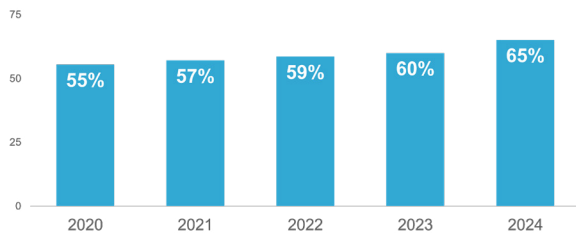
► Key Learnings

There continues to be growing support for tourism. Since 2020, there's been a seven-point increase in Americans' desire for tourism to be important in their local area (51% in 2020 to 58% in 2024). The perception that tourism is good for their local area also increased from 57% in 2020 to 64% in 2024.

There is also strong support for tourism development, with two-thirds of Americans supporting tourism growth (66%) and agreeing that tourism should be encouraged where they live (65%). The level of agreement for both increased by 10-points since 2020.

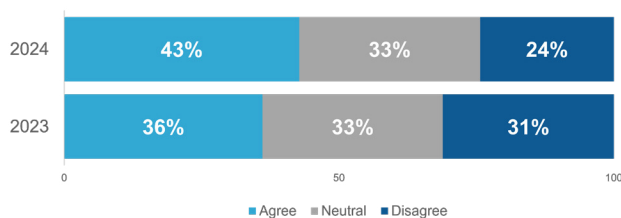
The perception that the positive benefits of tourism outweigh the negative impacts have seen steady growth since 2020. Since 2020, there has been a 10-point increase in agreement with this statement (55% in 2020 to 65% in 2024). Americans recognize that tourism involves both positive and negative impacts and increasingly believe the benefits are worth it.

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



We're also seeing positive momentum around destination stewardship. About four in ten Americans (43%) believe their local government is doing a good job balancing resident quality of life and visitor satisfaction, a seven-point increase from 2023. However, there is still a significant opportunity to continue communicating our destination stewardship efforts as a third of Americans (33%) are neutral and don't have strong opinions on this topic.

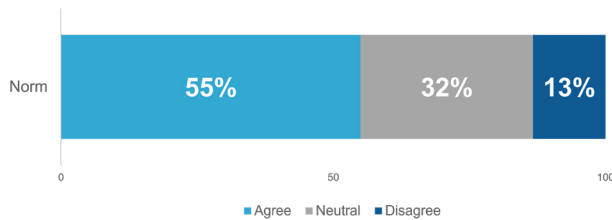
My local government is doing a good job balancing resident quality of life and visitor satisfaction



► Economy

Americans continue to recognize the importance of tourism for their local economies. About six in ten Americans agree that tourism is important to their local economy (58%) and encourages investment in their local economy (60%). This year, we sought to assess residents' understanding of the indirect and induced impacts of tourism. Over half of Americans (55%) agree that the economic impact of tourists in their area helps to support industries and businesses not directly related to tourism. Only 13% disagree with this statement. Americans understand the far-reaching economic contributions of tourism to their local economies.

The economic impact of tourists in our area helps to support industries and businesses not directly related to tourism

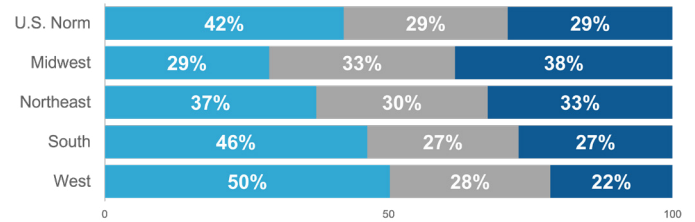


► Quality of Life and Environment

Americans also understand the impact of tourism on their quality of life. Half of Americans (49%) acknowledge they have more recreational opportunities (places to go and things to do) because of tourism in their area, up seven-points since 2020. More specifically, about half agree that the shopping (48%) and dining (53%) opportunities in their area are better because of tourism, both up five-points from 2023.

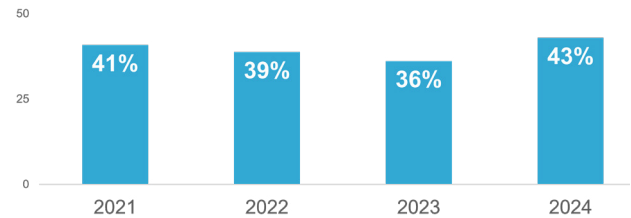
Despite these positive trends, there is a growing concern about the impacts of tourism on the cost of living. About four in ten Americans (42%) agree housing is becoming less affordable in their area due to tourism, and that the growth in tourism is causing prices to rise, making things less affordable for residents, a five-to-six-point increase, respectively, since 2023. Cost of living concerns are more prevalent in the South and West than the Northeast and Midwest.

The growth in tourism is causing prices to rise, making things less affordable for residents



Between 2021 and 2023, Americans' perception that the tourism industry values sustainability and natural resources was on a downward trend. However, we saw a positive shift this year, with 43% agreeing with this statement compared to the 2023 low of 36%.

The tourism industry values sustainability and our natural resources



Destination stewardship efforts and communicating the work DMOs are doing to address sustainability can help continue this positive shift. Results suggest that environmental sustainability messaging for tourists may be well received by residents. Nearly seven in ten (68%) agree that tourists should be educated on how to travel responsibly and care for natural areas, as only four in ten (40%) believe tourists are respectful of natural areas.

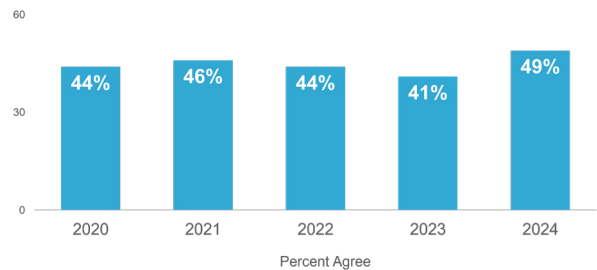
► Tourism Employment

With workforce attraction and retention continuing to be important for tourism destinations, this topic was expanded this year to explore the nuances of tourism employment. The tourism industry is often recognized as a great industry for an individual's first job, but less so for a career. Six in ten Americans (61%) agree that the tourism industry offers many entry-level employment opportunities, but agreement levels drop by at least 10-points when respondents are asked about their perceptions of careers in tourism. About half of Americans agree that the tourism industry offers rewarding careers (48%), and that there are opportunities for career advancement in the tourism industry (51%). Despite these differences, perceptions regarding opportunities for career advancement are improving and increased by five-points from the previous two years (46% in 2022 and 2023).

Half of Americans (51%) agree there are jobs in the tourism industry with desirable pay and benefits, six points higher than 2023 (45%). At the same time, however, the perception that most jobs in the tourism industry

are low-paying and seasonal persists, with half of Americans (49%) sharing this sentiment, the highest it has been since 2020.

Most jobs in the tourism industry are low-paying and seasonal



While the perceptions of tourism employment are nuanced, there is a promising opportunity in that there are sizable neutral responses (ranging from 29% to 34%) to tourism employment sentiments. This suggests that education and outreach about the wide range of opportunities from first-time jobs to rewarding careers can help improve Americans' perceptions of employment in the tourism industry.



Key Takeaways

Overall, 2024 was a positive year for Americans' sentiments towards tourism. Despite concerns about the cost of living, overall support for tourism continues to grow. Americans increasingly understand the importance of tourism to their communities. The industry can build on the positive momentum with ongoing destination stewardship and advocacy efforts:

1

Continue highlighting destination stewardship efforts. The tourism industry made significant progress this year in Americans' perception of destination stewardship and the industry's commitment to sustainability. There is an opportunity to make additional gains by reinforcing the value of tourism to residents' quality of life.

2

Encourage tourism leaders to share their career stories. Sharing the diverse career journeys of tourism leaders can help raise awareness of the career possibilities available within the tourism industry.