

AMERICAN RESIDENT SENTIMENT TOWARDS TOURISM

Highlights from the 2021 American Resident Sentiment Study

Introduction

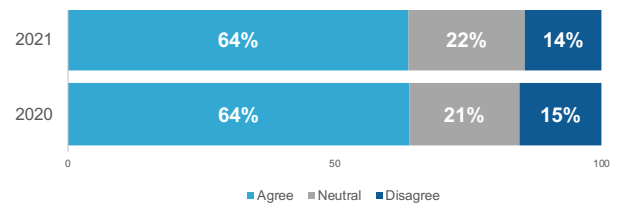
The travel and tourism industry has been challenged by the coronavirus for nearly two years, with the impact of the pandemic ranging from challenging to catastrophic. But even before the pandemic, the industry was increasingly in the spotlight, as communities debated the pros and cons of hosting visitors, weighing the jobs and revenues tourism provides against potential overcrowding and even environmental concerns.

In an effort to provide actionable data for these debates, Longwoods International annually measures the sentiment of Americans and their opinions on travel and tourism in their state and communities across a broad spectrum of aspects ranging from the growth in home sharing accommodations to the pressures of increased tourism and the perceived quality of life and economic benefits of this industry.

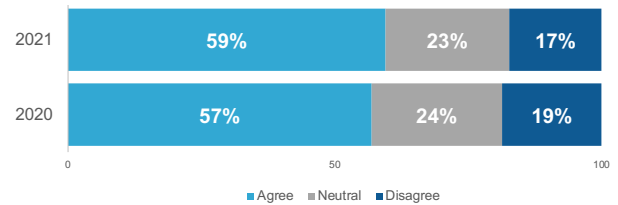
In 2021 Longwoods International fielded a national resident sentiment study utilizing a national online consumer research panel of 4,000 adults. The scale and scope of this study make insights available on the regional and generational level, allowing for both a national benchmark evaluation, as well 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.

In this second such survey of U.S. residents and their perceptions of the travel industry during COVID-19, support for the industry and its employees remains strong, with about two thirds of respondents believing that tourism is good for their state and local community, and less than 20% disagreeing with that statement.

Overall, I think tourism is good for my state



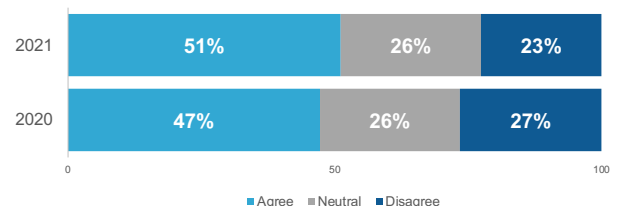
Overall, I think tourism is good for my local area



The Highlights

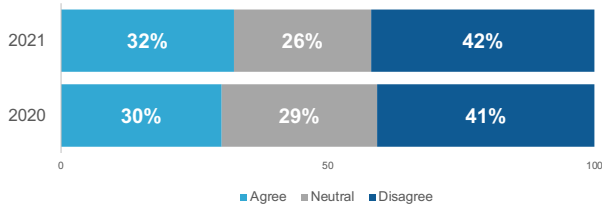
The pandemic has presented an opportunity for the tourism industry to demonstrate the importance of travel and tourism to local economies. Americans favor tourism development and growing the number of tourists coming to their areas, with half supporting an increase in the number of visitors while a quarter do not favor more visitation.

I would like to see more tourists coming to my area



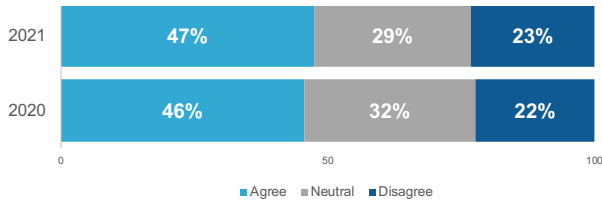
Americans generally support adding new events and new facilities in an effort to attract more visitors. But, they are concerned that residents are not informed when such plans are underway, with 42% saying they are not consulted when major developments are underway, while 32% say they are in the loop on such developments.

Residents are consulted when major tourism development takes place in this area

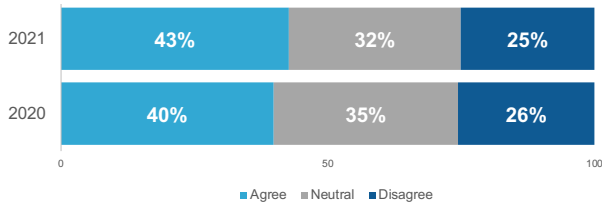


When it comes to tourism promotion, support for the industry continues, with broad approval of state and local campaigns to attract visitors through such efforts. By a ratio of about two to one, Americans favor state and local tourism promotion efforts.

My state government should support/help fund the promotion of tourism

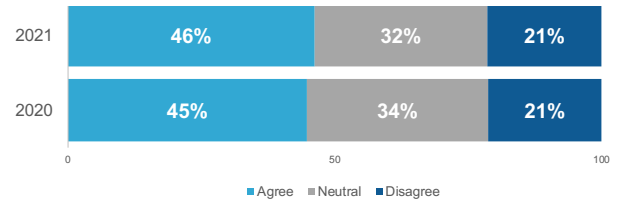


My local government should support/help fund the promotion of tourism



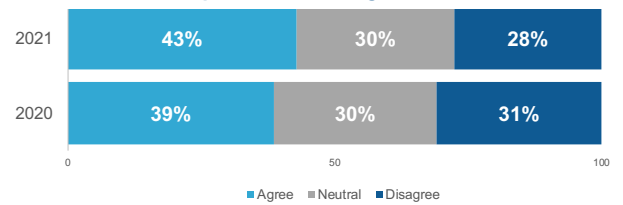
Despite positive perceptions of travel and tourism broadly, there are some specific issues where public opinion is not completely in sync with segments of the industry. For example, nearly half of respondents believe lodging taxes should be used to help pay for local services, not for more tourism promotion.

Hotel/lodging taxes should be used to help pay for local services, not to promote more tourism



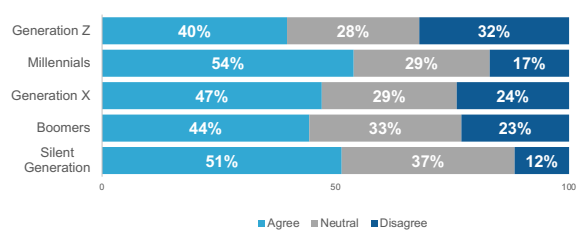
More than 40% believe that accommodation-sharing services such as Airbnb and VRBO can be disruptive to local neighborhoods.

People who use accommodation-sharing services like Airbnb, Vrbo, etc., can be disruptive to local neighborhoods

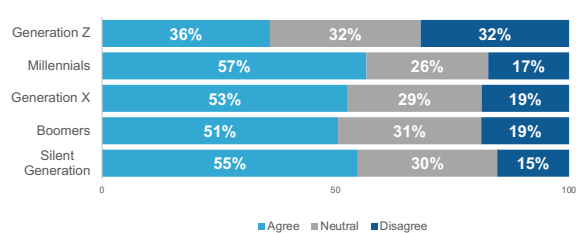


Across generational segments in the U.S. there is little variance in sentiment toward the perceptions of tourism employment and the ability of the industry to attract new business and residents to local areas, except for Generation Z. Only 39% of Gen Z agree that there are opportunities for career advancement in tourism, which compares to 57% of Millennials and 49% of Generation X.

There are jobs in the tourism industry with desirable pay and benefits

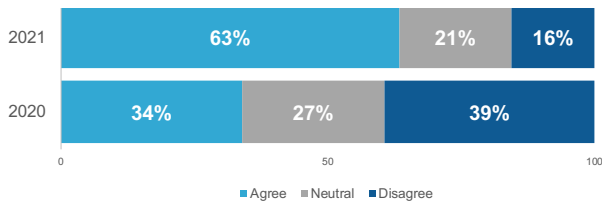


Tourism attracts new businesses to our local area

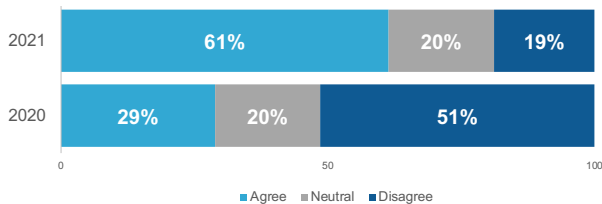


The most dramatic changes in travel and tourism perceptions from 2020, the first year of the pandemic, to 2021, are seen in the attitudes toward the relative safety of activities. By the time of this most-recent survey, coronavirus vaccines were widely available and that post-vaccine confidence is evident in the data. Confidence in shopping safely in retail stores jumped from 34% in 2020 to 63% in 2021, and the perceived safety of dining in restaurants showed a similar increase.

I feel safe shopping in retail stores



I feel safe dining in restaurants



Key Takeaways from this Study

The major takeaways from this research are that first, there is broad support for the travel and tourism industry across the country. However, there exist areas for attention by the industry:

- The need for better resident engagement around topics of public concern
 - The industry should pay attention to public concerns about specific issues, including opinions on the public use of lodging tax revenues, disruptions to neighborhoods by lodging sharing services.
- Residents feel largely left out of the conversation on tourism development
 - There is a need to grow communication with residents to ensure they are part

of the conversation about tourism development and feel informed

- GenZ needs to be included in the conversation and engaged with the tourism industry to develop an understanding of the value of travel and tourism.

Despite the positive results noted in this survey, one of the major lessons of this ongoing research during the COVID-19 pandemic is that factors influencing American resident sentiment toward tourism are continuously evolving. It is for this reason that each year Longwoods International, in partnership with Destinations International, continues to conduct this research. This study allows resident sentiment data on current and emerging issues to be monitored and shared with Destinations International membership and stakeholders. We look forward to providing these ongoing updates.

To view the full report of this study, visit longwoods-intl.com.

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

Source - all data property of Longwoods International. longwoods-intl.com