"WAITER! THERE'S A TOURIST IN MY SOUP": UNDERSTANDING THE SENTIMENT OF PEOPLE IN YOUR COMMUNITY - THE NEXT PHASE

AMIR EYLON
PRESIDENT & CEO
LONGWOODS INTERNATIONAL
Sneak Preview:

2019 Resident Sentiment Towards Tourism

Amir Eylon

November 13, 2019
After almost 40 Years of Talking to Travelers…

- It all began with our Clients…
- Which led to our 2018 National Study…
- Which led back to our Partners and Clients…
- …And now we are back!
Is “Overtourism” over-hyped?
What are the real issues?
What may be helpful?
To create an ongoing national benchmark to track/compare relevant issues.
To provide insights to DMO’s.
I DO NOT get paid by the slide!

I will move quickly!

I will send this presentation to you!

So sit back, relax, and just listen…
Methodology

• Longwoods International conducted a survey of U.S. residents designed to measure perceptions and attitudes regarding tourism and its impacts, as input into potential communications and program development.

• Method
  • Online survey conducted in July 2019
  • Sample:
    • 1502 adults (18 years and older) residing in the United States
    • Drawn from major online consumer panel
    • Data weighted at tabulation to correct relative proportions based on actual population distribution of the United States in terms of key demographic characteristics (age, sex, income, household size) as defined by the U.S. Census
    • In 2019, a “don’t know” option was added to the 10-point Likert scale.
Key Findings
Resident Sentiment:

Overall Sentiment About Tourism
Overall, I think tourism is good for my state as a whole
Overall, I think tourism is good for my local area

Overall Sentiment About Tourism

U.S. Norm

Percent

- Agree
- Neutral
- Disagree

- Overall, I think tourism is good for my local area
Overall Sentiment About Tourism

In general, the positive benefits of tourism outweigh negative impacts
Resident Sentiment: Tourism Development and Growth
Tourism Development and Growth

I support tourism growth

U.S. Norm

Percent

Agree  Neutral  Disagree

75  14  11
Tourism Development and Growth

I believe tourism should be encouraged here

U.S. Norm

Percent

- Agree
- Neutral
- Disagree

75
13
12
Tourism Development and Growth

We need planned and controlled tourism development

U.S. Norm

<table>
<thead>
<tr>
<th>Percent</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-20</td>
<td></td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>20-40</td>
<td>65</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40-60</td>
<td></td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>60-80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>80-100</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
I support building new tourism facilities that will attract visitors to this area

U.S. Norm

percent

Agree Neutral Disagree

62
19
18
Tourism Development and Growth

My state government is doing a good job managing the pace of tourism development

U.S. Norm

49

25

26

9%

Don’t Know

Percent

Agree  Neutral  Disagree
Residents are consulted when major tourism development takes place in our state

U.S. Norm

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>20</td>
<td>48</td>
</tr>
</tbody>
</table>

10% Don’t Know
Uncontrolled tourism growth is jeopardizing our heritage and culture

U.S. Norm

Percent

Agree Neutral Disagree

31 17 51
Tourism Development and Growth

Tourism development is happening too fast in our state

U.S. Norm

- Agree: 30%
- Neutral: 21%
- Disagree: 49%
Resident Sentiment:

Tourism Promotion
Tourism Promotion – State Government

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

U.S. Norm

- Agree: 59%
- Neutral: 20%
- Disagree: 21%
Tourism Promotion – State Government

My state government is doing a good job at promoting tourism
Tourism Promotion – Local Government

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

U.S. Norm

Percent

Agree Neutral Disagree

0 20 40 60 80 100
Tourism Promotion – Local Government

My local government is doing a good job at promoting tourism to this area

U.S. Norm

Percent
- Agree
- Neutral
- Disagree

0 20 40 60 80 100

49 25 26
Tourism Promotion

We should develop/host more major events to attract tourists to our area
Tourism Promotion

I like the way my state’s tourism advertising represents my home

U.S. Norm

Percent
- Agree
- Neutral
- Disagree

59
21
21
Hotel/lodging taxes should be used to help pay for local services, not to promote more tourism
We don’t need the state to promote tourism – we have such a great state that people will come anyway
Resident Sentiment: Economy
Tourism encourages investment in our local economy
Without the tax revenues we get from tourists, we would have to pay higher state and local taxes for government programs and services.
The sales tax that tourists pay on their purchases adequately compensates for wear and tear they create on our infrastructure.
Most jobs in the tourism industry are low-paying and seasonal
The growth in tourism is causing prices to rise, making things less affordable for residents.
Economy

My household standard of living is higher because of money tourists spend here

U.S. Norm

33 Agree
21 Neutral
45 Disagree

Percent

Agree Neutral Disagree
Resident Sentiment:
Quality of Life
I have more recreational opportunities (places to go and things to do) because of tourism in this area
Shopping opportunities are better here as a result of tourism

U.S. Norm

Percent

- Agree
- Neutral
- Disagree

57
19
24
Quality of life in this state has improved because of increased tourism

U.S. Norm

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>54</td>
<td>22</td>
<td>25</td>
</tr>
</tbody>
</table>

Percent

- Agree
- Neutral
- Disagree
Tourists add to traffic congestion and parking problems here
Quality of Life

The quality of public services has improved due to more tourism here

U.S. Norm

Percent
 Agree  Neutral  Disagree

48  25  27
Attractions and leisure facilities are becoming overcrowded because of more tourists
Tourism has caused an increase in crime and social problems like alcohol and drug use in the state
Resident Sentiment: Environment
Long-term planning can limit environmental impacts caused by tourism

U.S. Norm

- Agree: 71%
- Neutral: 15%
- Disagree: 14%

Percent

Agree Neutral Disagree
Tourism is a good alternative to more environmentally-damaging development
Environment

Tourism can actually help the environment as local governments and people seek to protect sensitive and scenic areas.
Resident Sentiment:
Accommodation- Sharing Services
Accommodation-sharing services like Airbnb should be regulated, just like hotels and other property-rental businesses.
Accommodation-sharing services like Airbnb, VRBO, etc., can cause inflation in rents, raising the cost of living for locals.
Accommodation-Sharing Services

People who use accommodation-sharing services like Airbnb, VRBO, etc., often show a lack of respect for the neighborhoods where they stay, with loud noise and disregard for local custom.

U.S. Norm

<table>
<thead>
<tr>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>43</td>
<td>20</td>
<td>36</td>
</tr>
</tbody>
</table>

9% Don’t Know
Involvement/Engagement with Tourism
Involvement/Engagement with Tourism

I recommend local tourist sites to people who are visiting my area

U.S. Norm

<table>
<thead>
<tr>
<th>Percent</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>63</td>
<td>16</td>
<td>20</td>
</tr>
</tbody>
</table>
When I come across local tourism news, I’m interested in finding out what’s happening.
I consider myself informed/up-to-date about tourism in this area.

- **55%** Agree
- **20%** Neutral
- **25%** Disagree

Involvement/Engagement with Tourism
State, Governments & Industries Perceptions
Consumer Confidence – Personal Situation

<table>
<thead>
<tr>
<th></th>
<th>Better</th>
<th>Same</th>
<th>Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now vs. a year ago</td>
<td>30</td>
<td>47</td>
<td>23</td>
</tr>
<tr>
<td>A year from now</td>
<td>43</td>
<td>44</td>
<td>13</td>
</tr>
</tbody>
</table>

Percent
Consumer Confidence – State as a Place to Live

Now vs. a year ago:
- Better: 19%
- Same: 52%
- Worse: 28%

A year from now:
- Better: 26%
- Same: 47%
- Worse: 26%

Percent: Better, Same, Worse
Overall Rating of Government Performance – State Govt

U.S. Norm

<table>
<thead>
<tr>
<th>Percent</th>
<th>Good</th>
<th>Neutral</th>
<th>Bad</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>39</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

0  20  40  60  80  100
Perceived Importance of Industries to Local Economy

- Education: 79%
- Health care & social assistance: 79%
- Technology & information: 72%
- Construction: 72%
- Retail: 71%
- Food services: 71%
- Professional & business services: 71%
- Financial services: 70%
- Agriculture: 66%
- Leisure, tourism & hospitality: 66%
- Transportation & warehousing: 61%
- Manufacturing: 60%
- Government: 59%
- Mining: 22%

Percent rating as important
Perceived Benefit of Industries to Public Good of Community

- Health care & social assistance: 78%
- Education: 78%
- Law enforcement & firefighters: 77%
- Technology & information: 72%
- Food services: 69%
- Retail: 67%
- Professional & business services: 66%
- Construction: 66%
- Agriculture: 65%
- Financial services: 64%
- Leisure, tourism & hospitality: 64%
- Transportation & warehousing: 58%
- Government (excl. law enforcement & firefighters): 56%
- Manufacturing: 55%
- Mining: 22%
Conclusions and Implications
Food for Thought

- Strong general support for tourism
- Strong Support for Tourism Development
- Support for marketing
Mixed Messages!

Lots of Neutral and “Don’t Know” on Big Issues...

Opportunity for Stakeholder Education/Engagement
Tourism perceived as important

Not necessarily at personal level

Are people really engaged?
Never assume support!

- Regular public communication
- More than annual reports
- Consumer friendly events, etc.
Food for Thought

- Brand Ambassadors
- Language of Community!
- Connect with community/other stakeholders
Want To Learn More???

- White Paper with Destinations International:

https://longwoods-intl.com/resident-sentiment-research
Want To Learn More???

• Resident Sentiment Study Partner Program with Destinations International
THANK YOU!!!

How to reach me:

Amir Eylon

aeylon@longwoods-intl.com

Longwoods-intl.com

Facebook: @LongwoodsInternational

Twitter: @Lngwds