

Resident Sentiment: Value of Tourism Study

Summary of Findings

August 2021



Sampling & Methodology

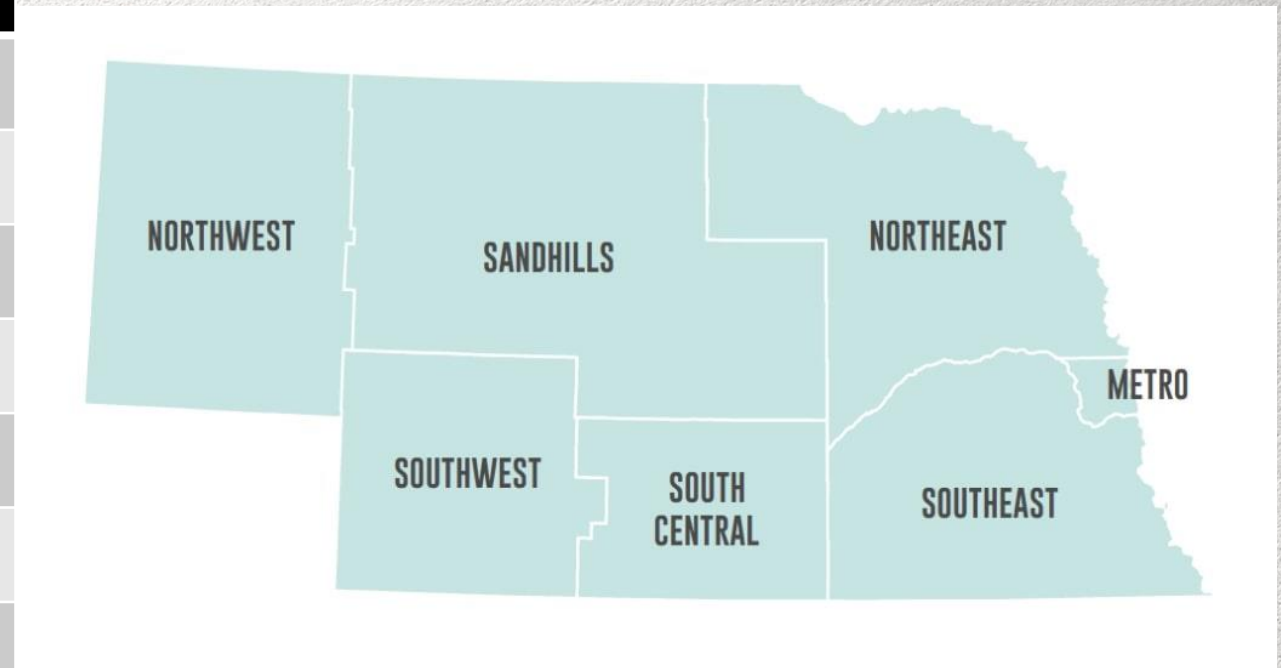
- Study conducted as an online survey among Nebraska residents.
- Respondents sourced via Qualtrics panel and a Facebook ad on the Visit Nebraska page.
- Data collected between March 18th and April 6th, 2021.
- A total of 1,017 individuals completed the survey.
- To achieve demographic representativeness across the combined sample sources, data has been weighted by gender, age, and geographic region to match the Nebraska resident population.



Respondent Distribution by Region

Geographic Region	Respondents (n=1,017)	
Metro	37.6%	n=382
Southeast	26.4%	n=268
Northeast	12.6%	n=128
South Central	9.1%	n=93
Northwest	6.2%	n=63
Southwest	4.5%	n=46
Sandhills	3.6%	n=37

Unweighted data shown.



What Residents Love About Nebraska



What Residents Love Most about Living in NE – Open-Ended

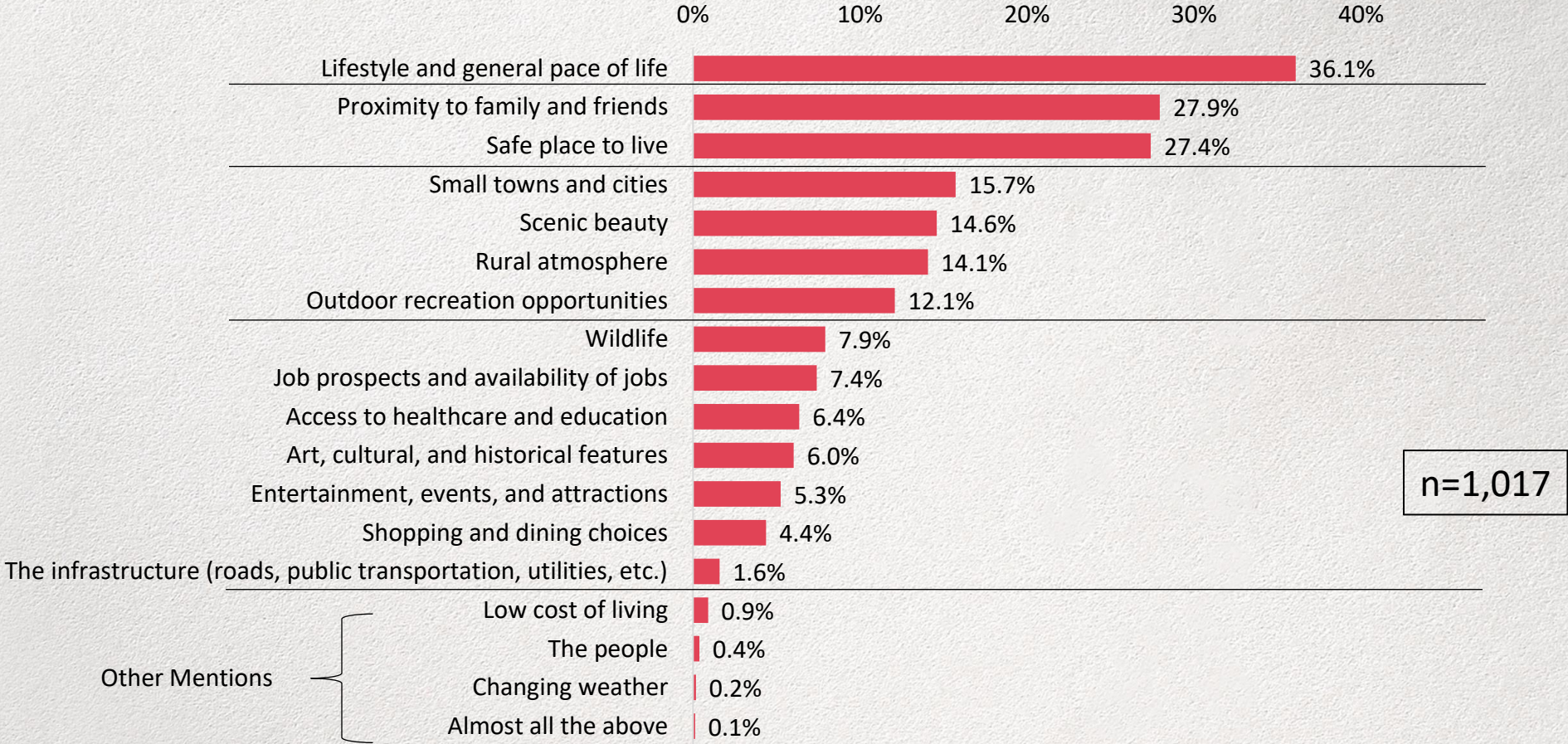
<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>
NET: The People	40.0%
Friendly/helpful/kind people	34.9%
Family and friends	5.8%
NET: Scenery, Outdoors, and Recreation	37.9%
Scenery/beauty/sunrises/sunsets	13.9%
Wide open spaces/land	12.3%
Outdoor recreation opportunities (hunting, fishing, hiking, state parks, etc.)	10.3%
Nature/wildlife	5.9%
Diversity of terrain/scenery	5.5%
The Sandhills	3.4%
Rivers/lakes	3.2%
Weather/all four seasons	14.6%
NET: Way of Life	14.5%
The Good Life/relaxed/laid-back	6.0%
Values/morals/politics	4.7%
NET: Safe/Clean	9.2%
Safe/low crime	5.1%
Clean environment/air	5.0%
NET: Quiet/Uncrowded	9.2%
Low population	4.8%
Quiet environment/not busy	3.7%

<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>
Rural/farming	8.2%
Lots of things to do	7.4%
NET: History and Culture	7.3%
The history	4.1%
The cultural opportunities	3.7%
Cost of living	8.7%
Small towns	5.7%
Cities/Urban	5.6%
Sports	5.0%
Where I've always lived/Home	4.8%
Accessibility/No traffic	4.8%
NET: Restaurants/Breweries/Wineries	5.2%
Restaurants/food culture	4.9%
Good education system	4.5%
The zoos	3.7%
Family-friendly	3.3%
Diversity	3.3%
Location within U.S.	3.0%
Other single mentions	7.6%
None	1.6%
Don't know	.4%

B1. What do you love most about living in Nebraska? Please be as detailed and specific as possible. There is plenty of room to type your answer. Only responses given by 3.0% of the respondents or more are shown.



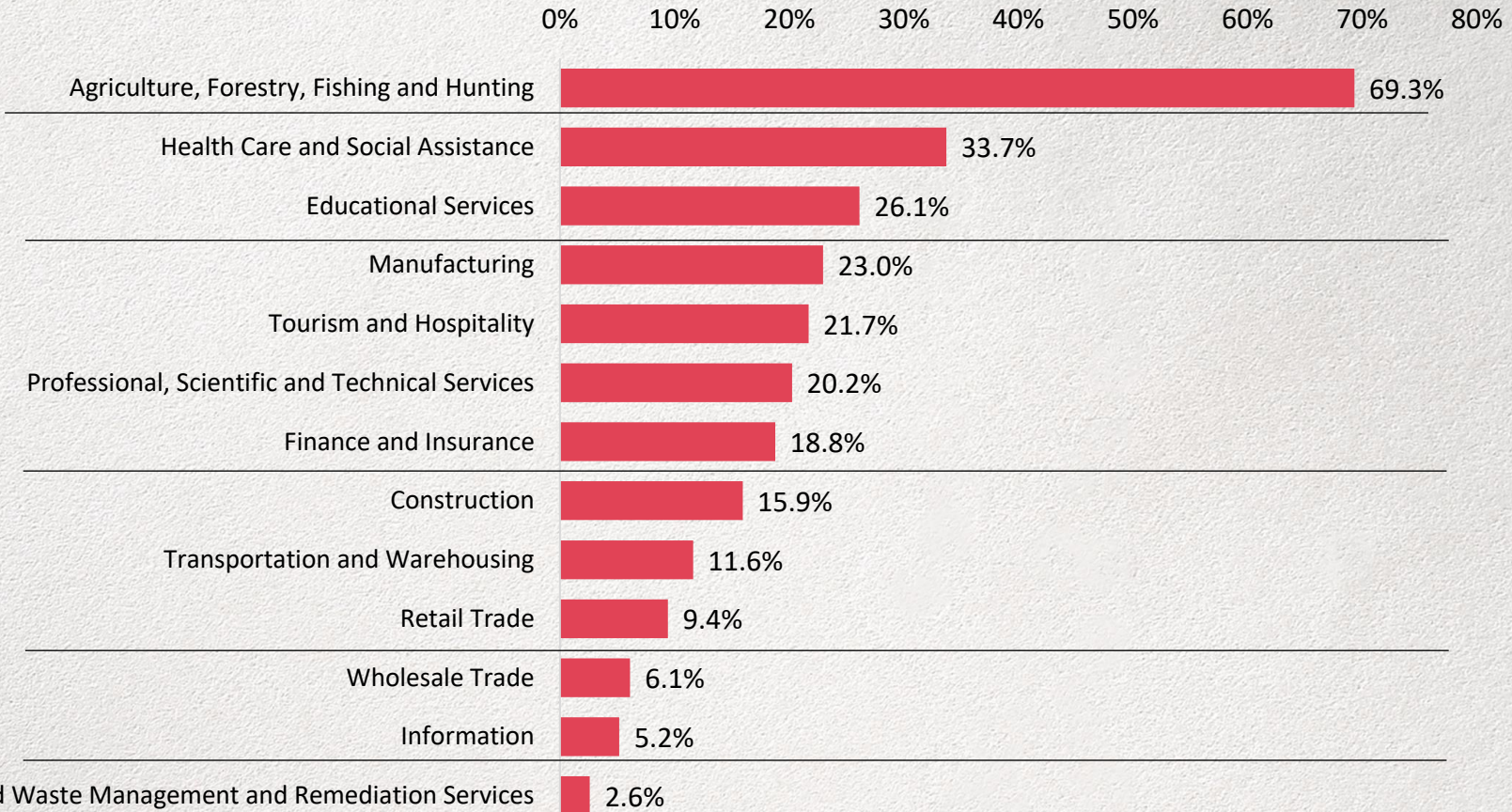
What Residents Enjoy Most about Living in NE – Closed-Ended



Comparative Industry Importance



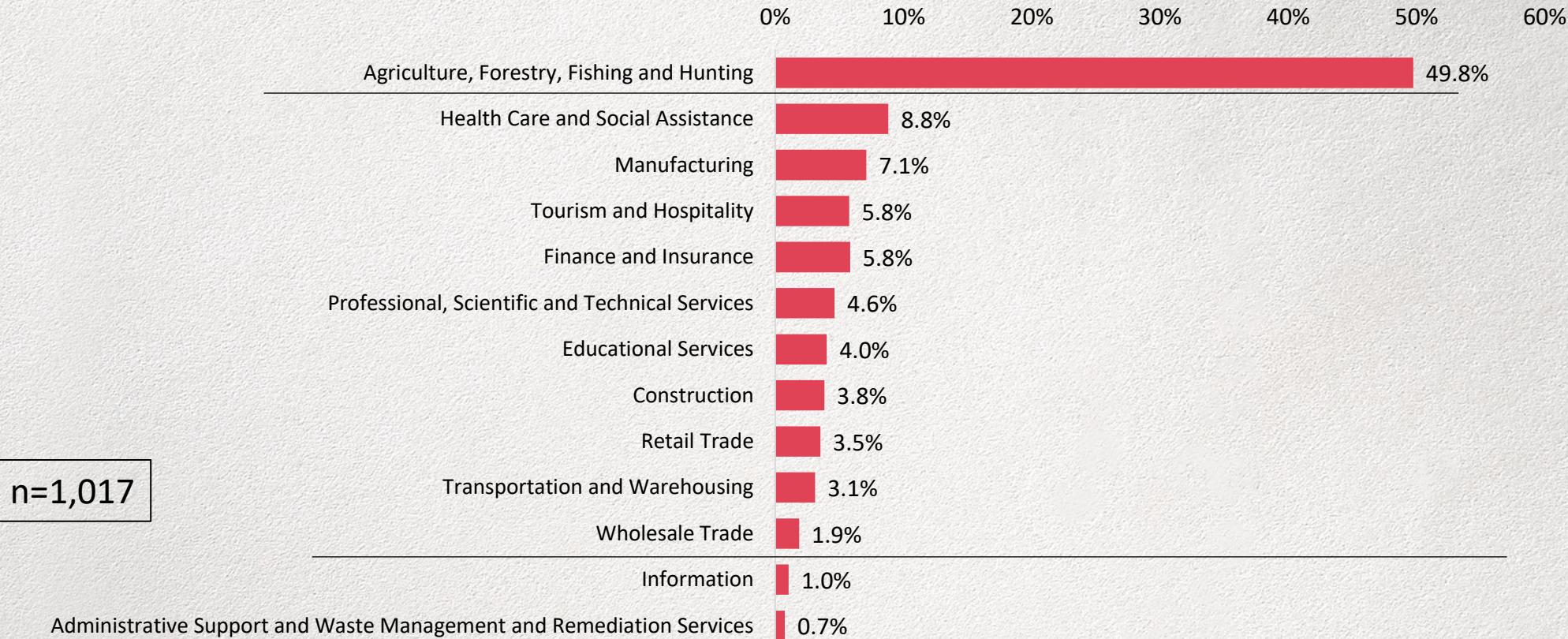
Most Important Economic Engines for Nebraska



n=1,017



One Industry with Biggest Economic Impact



Perceptions of the Tourism & Hospitality Industry



Positive Aspects/Benefits of Tourism and Hospitality in NE

<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>
NET: Economic Stimulation	31.5%
Tourism stimulates the economy in general	21.3%
Tourism supports local businesses	5.2%
Tourism brings in tax revenue	4.0%
Tourism provides jobs in Nebraska	3.9%
Tourism supports small/rural communities	2.9%
Tourism brings new business to the state	1.0%
NET: Increase Out of State Tourism	15.5%
Tourism educates others about Nebraska/its tourism	11.8%
Tourism brings people from out of state	4.7%
Nebraska people are friendly/helpful/kind	10.7%
There's lots to do in Nebraska	9.8%
Nebraska has outdoor recreation/wildlife/nature	9.4%
NET: Increased Quality of Life for Residents	7.5%
Tourism promotion educates residents/residents enjoy local tourism	2.6%
Tourism helps keep the state maintained/up to date	2.6%
Tourism supports families in Nebraska/relieves financial burden	2.0%

<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>
Nebraska has cultural/historic attractions	7.0%
NET: Sports/Sports Events	6.3%
Nebraska has good sports/sporting events	4.6%
Sports games/College World Series bring in revenue	1.7%
The zoo	5.7%
Nebraska is beautiful/scenic	4.9%
Nebraska is laid-back/relaxed/not crowded	3.6%
Nebraska has great restaurants	2.6%
Tourism leads to diversity/cultural understanding	2.5%
Nebraska is affordable to visit	2.5%
Tourism brings in new citizens/keeps residents here	2.4%
NET: Festivals/Events	2.1%
NET: Complaint about Nebraska Tourism	2.0%
Other single mentions	13.7%
None	4.4%
Don't know	3.2%

D1. What, if anything, would you say are some positive aspects or benefits of tourism and hospitality in Nebraska?
Only responses given by 2.0% of the respondents or more are shown.



Negative Aspects/Downsides of Tourism and Hospitality in NE

<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>	<i>Coded Open-Ended Responses</i>	<i>n=1,017</i>
None/Tourism is positive for Nebraska	17.7%	NET: Weather/Seasonality	5.3%
NET: Nebraska Needs More Attractions	16.7%	Winter/weather issues	4.2%
Nebraska doesn't have enough big/well-known attractions	14.0%	NET: Need More Balanced Tourism Efforts	5.2%
Nebraska needs amusement parks	2.0%	My region/certain areas or attractions are not promoted enough	3.5%
NET: Issues with Tourists	11.4%	Tourism needs to be more distributed across the state	1.9%
Tourists are disrespectful of the environment/residents/parks/Nebraska way	7.3%	NET: Need Improved Tourism Promotion	4.3%
Tourism attracts crime	4.4%	Nebraska is not promoted enough in general	4.3%
NET: Concerns About Crowding/Sustainability	10.4%	Nebraska attractions are too spread out	3.7%
Traffic/overcrowding	9.5%	NET: Nebraska is Too Expensive	3.4%
Environmental concerns of overcrowding	1.4%	Tourism makes Nebraska too expensive	2.7%
NET: Perception/Awareness Issues	6.8%	NET: Need More/Improved Amenities	3.0%
People have false perceptions of Nebraska	3.0%	Nebraska does not have enough hotels/motels/lodging	2.1%
Nebraska is unknown/Nebraska doesn't get enough tourism	2.9%	NET: Issues with Inclusiveness/Openness	2.7%
I-80 gives a bad impression/doesn't show off Nebraska	2.2%	Nebraska residents aren't always welcoming/open	2.4%
NET: Infrastructure/Maintenance Issues	5.5%	Other single mentions	12.5%
Nebraska is not being maintained enough (roads, state parks, etc.)	2.8%	Don't know	3.4%
Infrastructure issues	1.4%		

D2. What, if anything, would you say are some negative aspects or downsides of tourism and hospitality in Nebraska?
Only responses given by 1.4% of the respondents or more are shown.

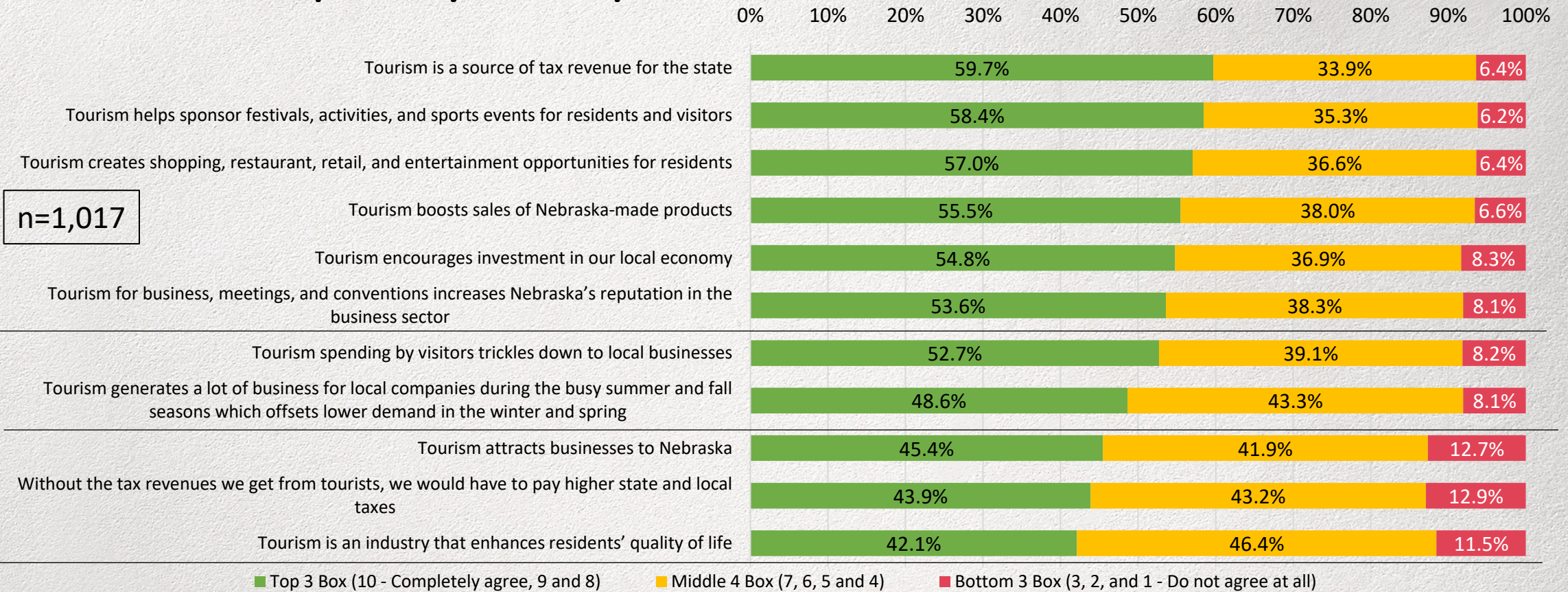


Tourism and Hospitality Perceptions

US Norms from Longwoods:

Shopping opportunities are better here as a result of tourism
 Tourism encourages investment in our local economy
 Without tax revenues we get from tourists, we would have to pay higher state and local taxes
 Quality of life in this state has improved because of increased tourism

Agree 42% / Neutral 31% / Negative 28%
 Agree 51% / Neutral 31% / Disagree 18%
 Agree 46% / Neutral 31% / Disagree 23%
 Agree 42% / Neutral 33% / Disagree 24%



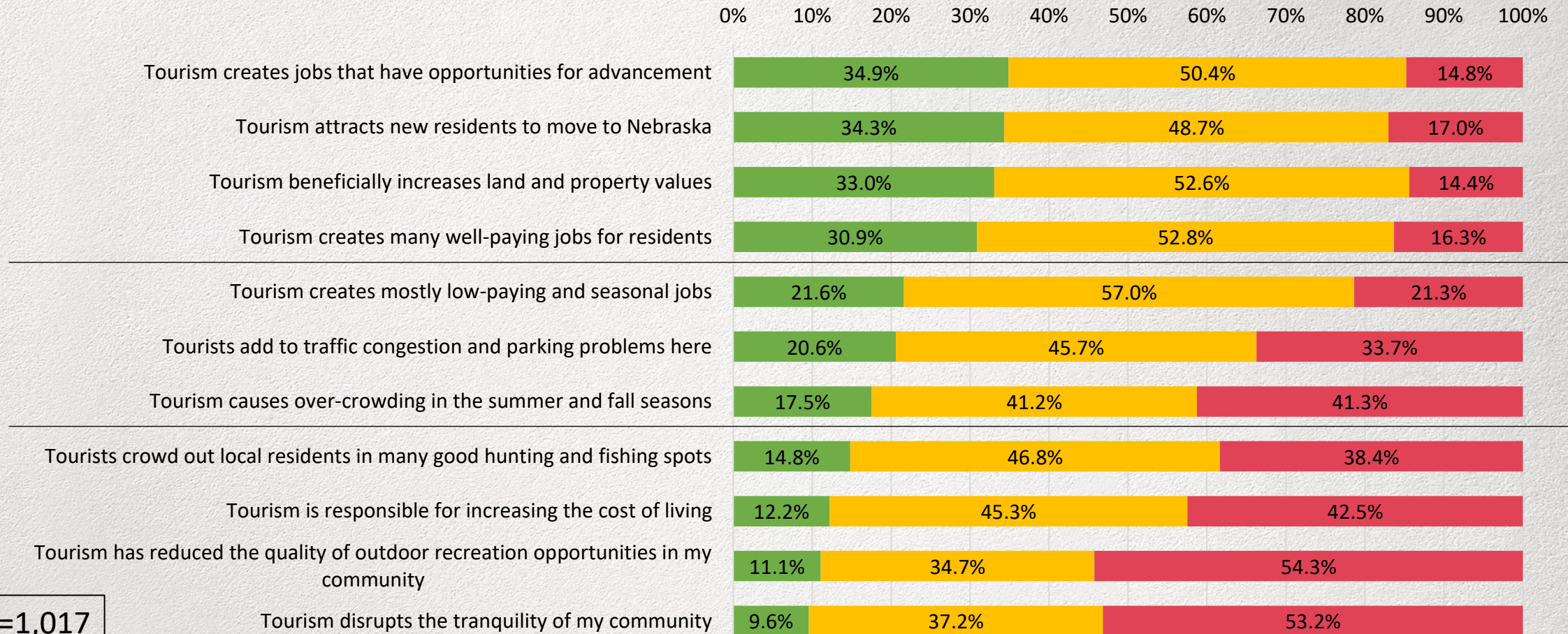
D3. How much do you agree or disagree with the following statements about tourism and hospitality in Nebraska? Please use a 10-point scale where 1 means "Do not agree at all," and 10 means "Completely agree."

US Norms from Longwoods:

Tourism creates mostly low-paying and seasonal jobs
 Tourists add to traffic congestion and parking problems here
 The growth in tourism is causing prices to rise, making things less affordable for residents

Agree 44% / Neutral 34% / Disagree 21%
 Agree 43% / Neutral 29% / Disagree 28%
 Agree 33% / Neutral 31% / Negative 36%

Tourism and Hospitality Perceptions (cont.)



n=1,017

■ Top 3 Box (10 - Completely agree, 9 and 8) ■ Middle 4 Box (7, 6, 5 and 4) ■ Bottom 3 Box (3, 2, and 1 - Do not agree at all)



D3. How much do you agree or disagree with the following statements about tourism and hospitality in Nebraska? Please use a 10-point scale where 1 means "Do not agree at all," and 10 means "Completely agree."

Tourism Impact Perceptions

US Norms from Longwoods:

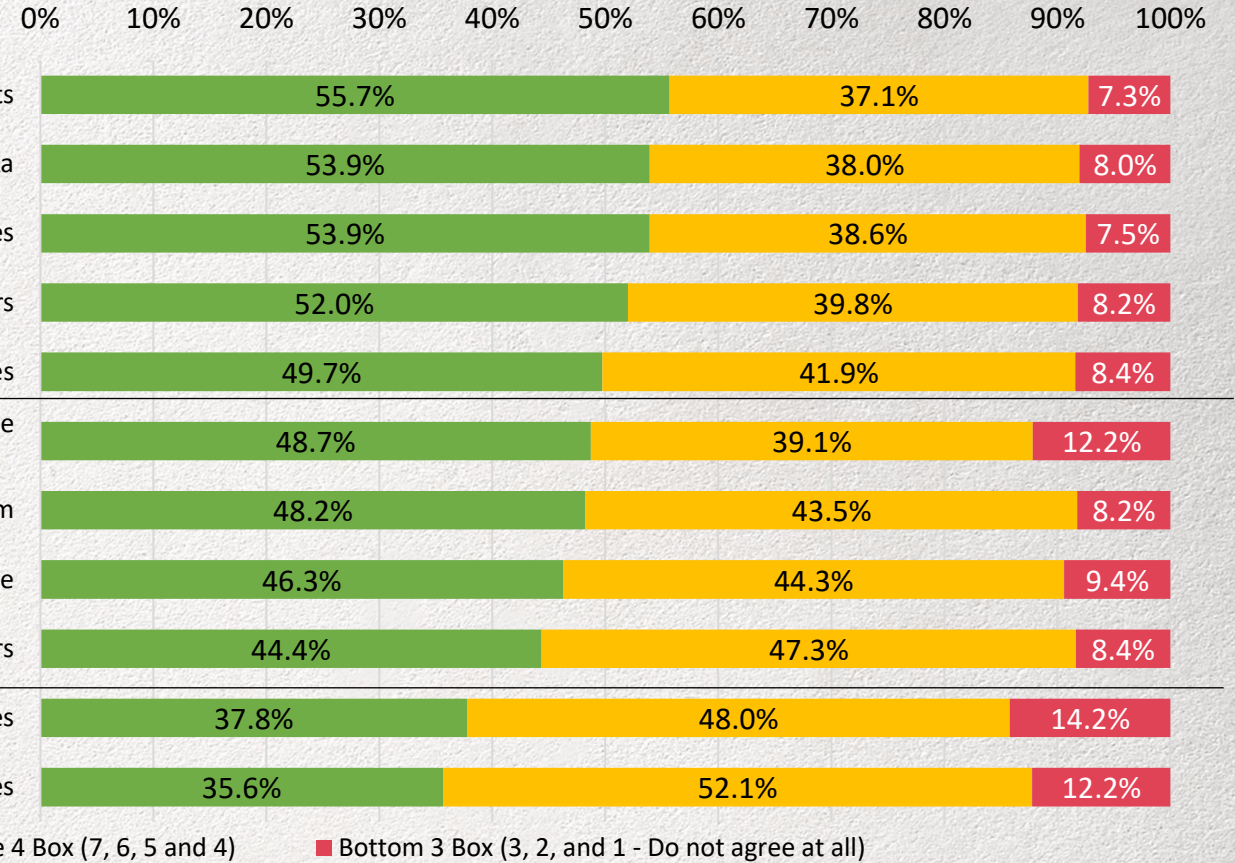
Long-term planning can limit environmental impacts caused by tourism

Agree 50% / Neutral 31% / Negative 19%

Tourism supports the preservation of local culture and protects the community's authenticity

Agree 48% / Neutral 29% / Disagree 23%

n=1,017

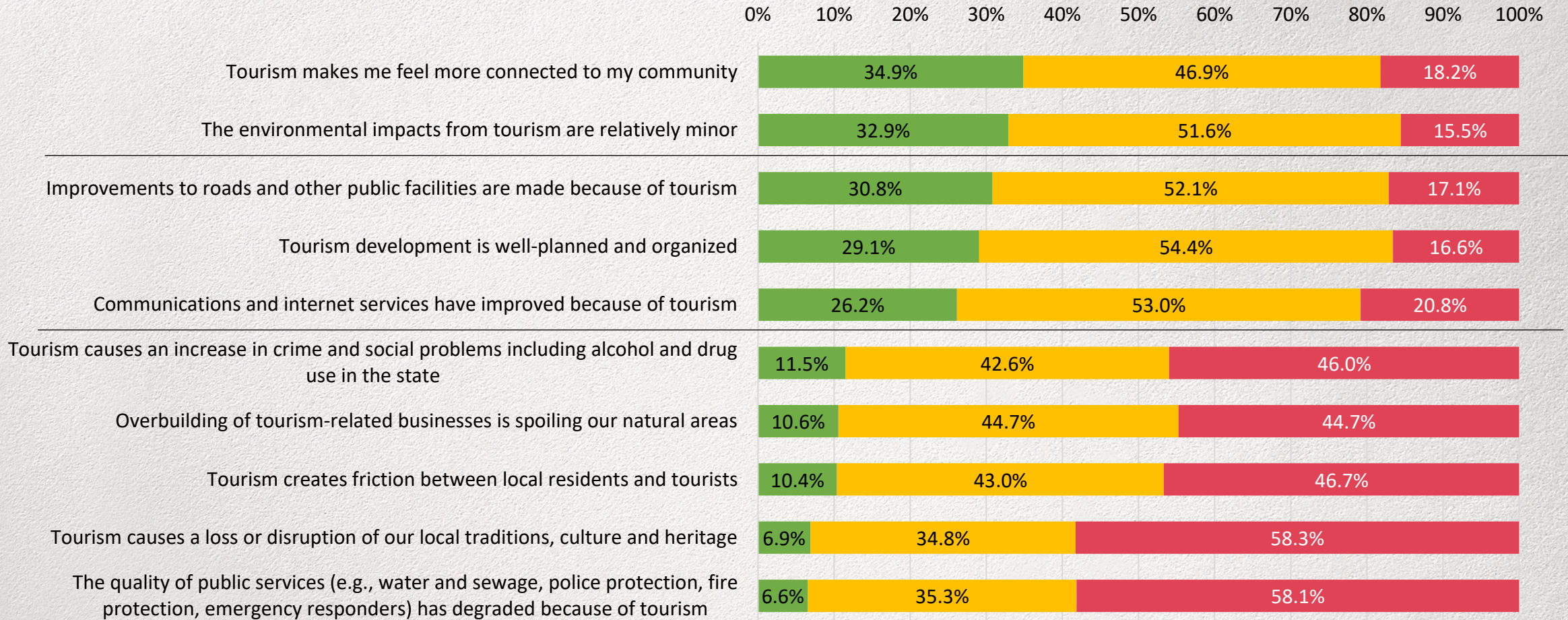


D5. How much do you agree or disagree with the following statements about tourism in Nebraska? Please use a 10-point scale where 1 means "Do not agree at all," and 10 means "Completely agree."

Tourism Impact Perceptions (cont.)

US Norms from Longwoods:

We need planned and controlled tourism development	Agree 52% / Neutral 31% / Negative 17%
Tourism causes an increase in crime and social problems including alcohol and drug use in the state	Agree 26% / Neutral 25% / Disagree 48%
Overbuilding of tourism-related businesses is spoiling our natural areas	Agree 36% / Neutral 30% / Disagree 35%
Uncontrolled tourism growth is jeopardizing our heritage and culture	Agree 30% / Neutral 26% / Disagree 54%



n=1,017

■ Top 3 Box (10 - Completely agree, 9 and 8)

■ Middle 4 Box (7, 6, 5 and 4)

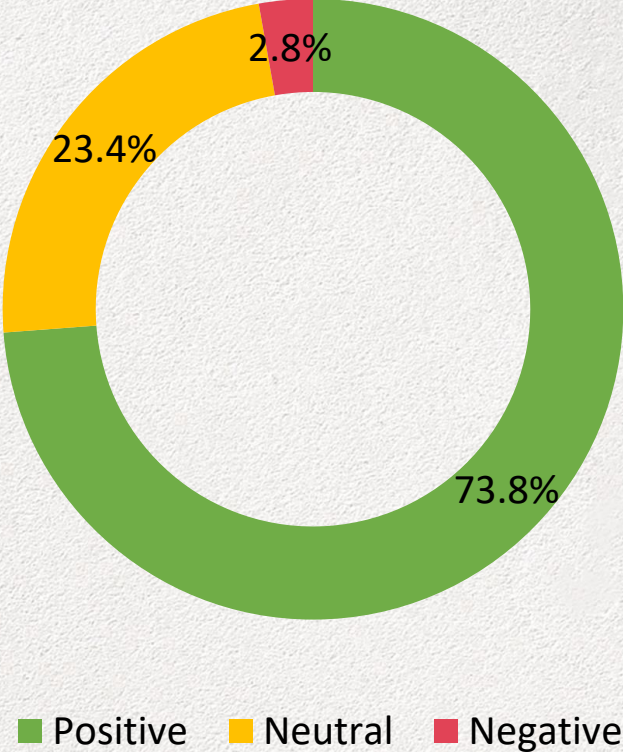
■ Bottom 3 Box (3, 2, and 1 - Do not agree at all)



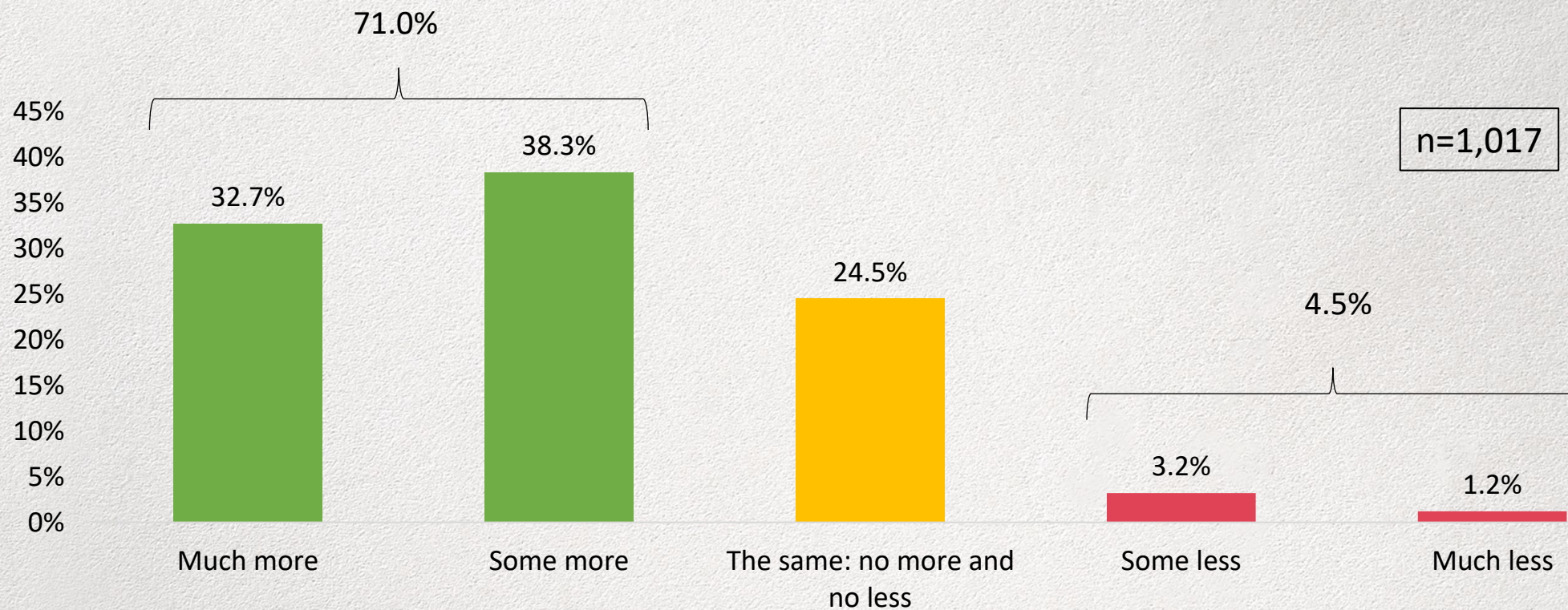
D5. How much do you agree or disagree with the following statements about tourism in Nebraska? Please use a 10-point scale where 1 means "Do not agree at all," and 10 means "Completely agree."

Attitudes Toward Tourists

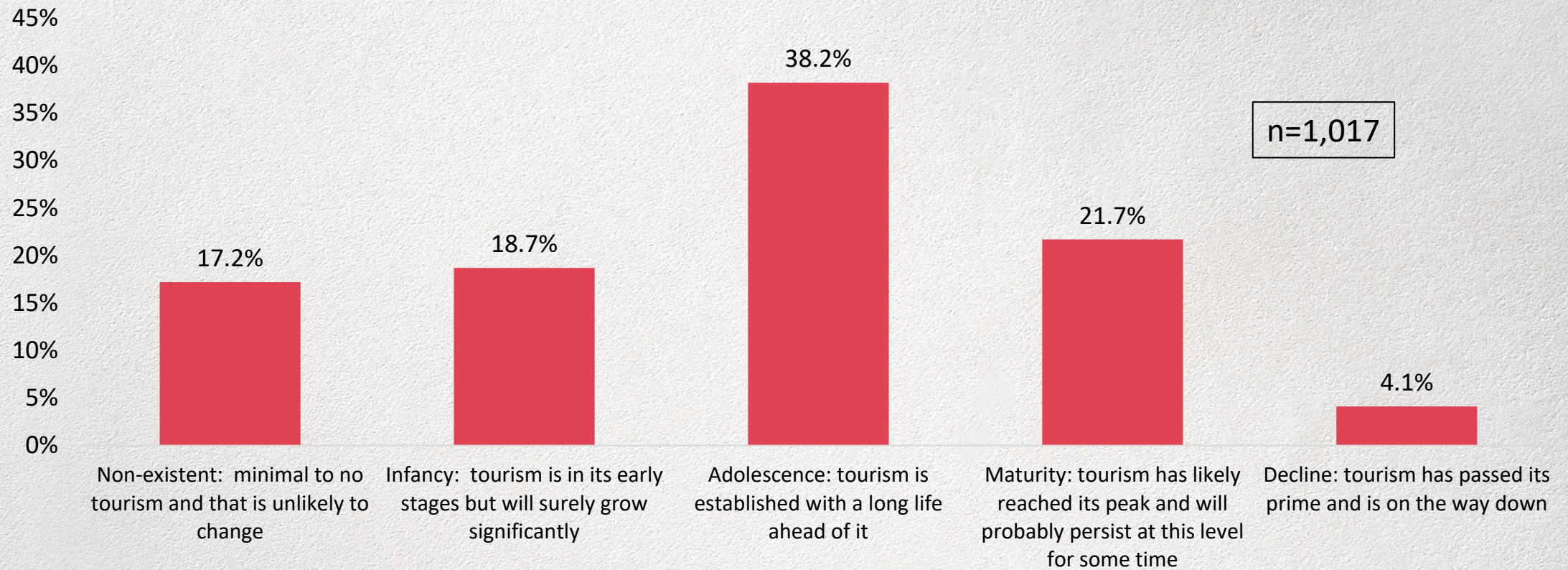
n=1,017



Prefer More or Less Tourism



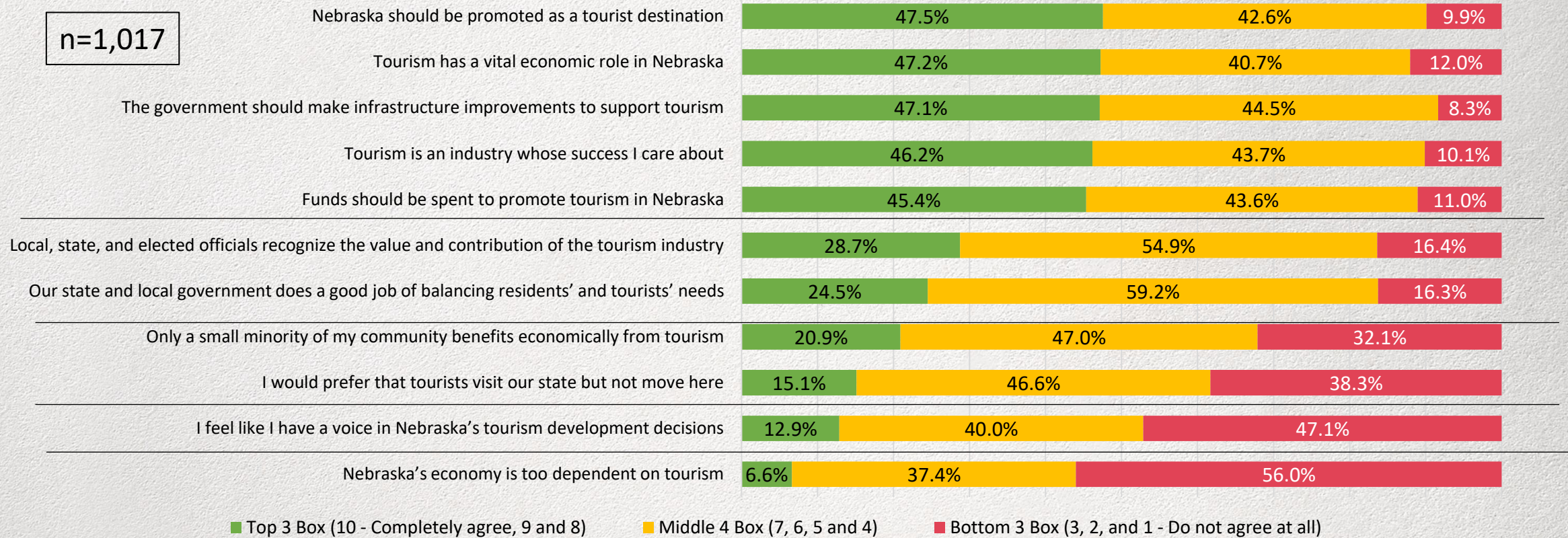
Tourism Momentum



Tourism Opinions, Attitudes and Beliefs

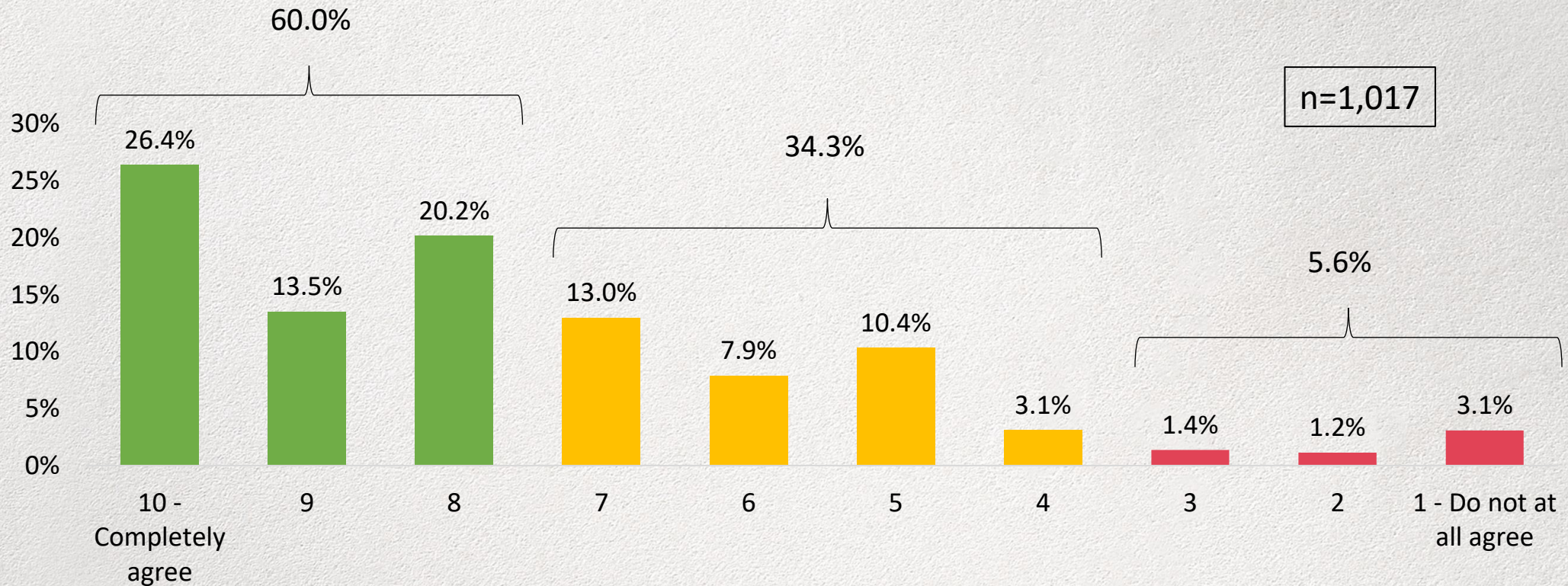
n=1,017

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



D9. How much do you agree or disagree with the following opinions, attitudes, and beliefs about tourism in Nebraska? Please use a 10-point scale where 1 means "Do not agree at all," and 10 means "Completely agree."

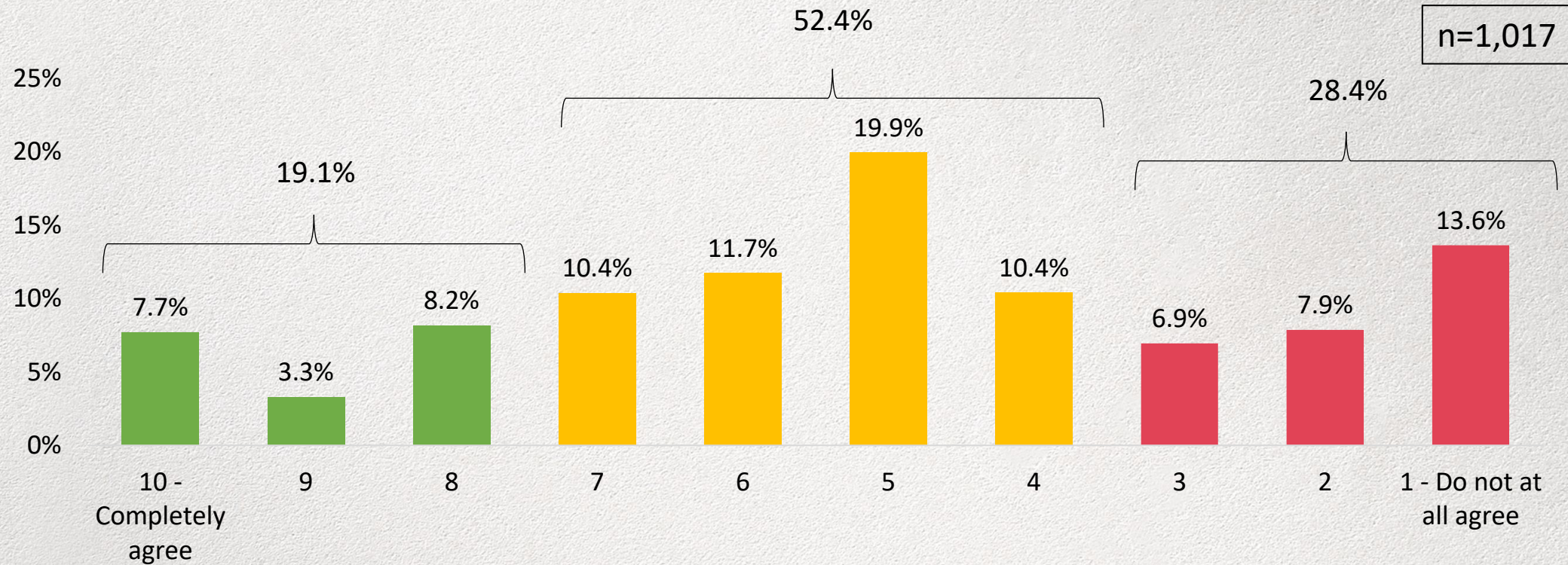
Whether Tourism Brings More Benefits than Problems



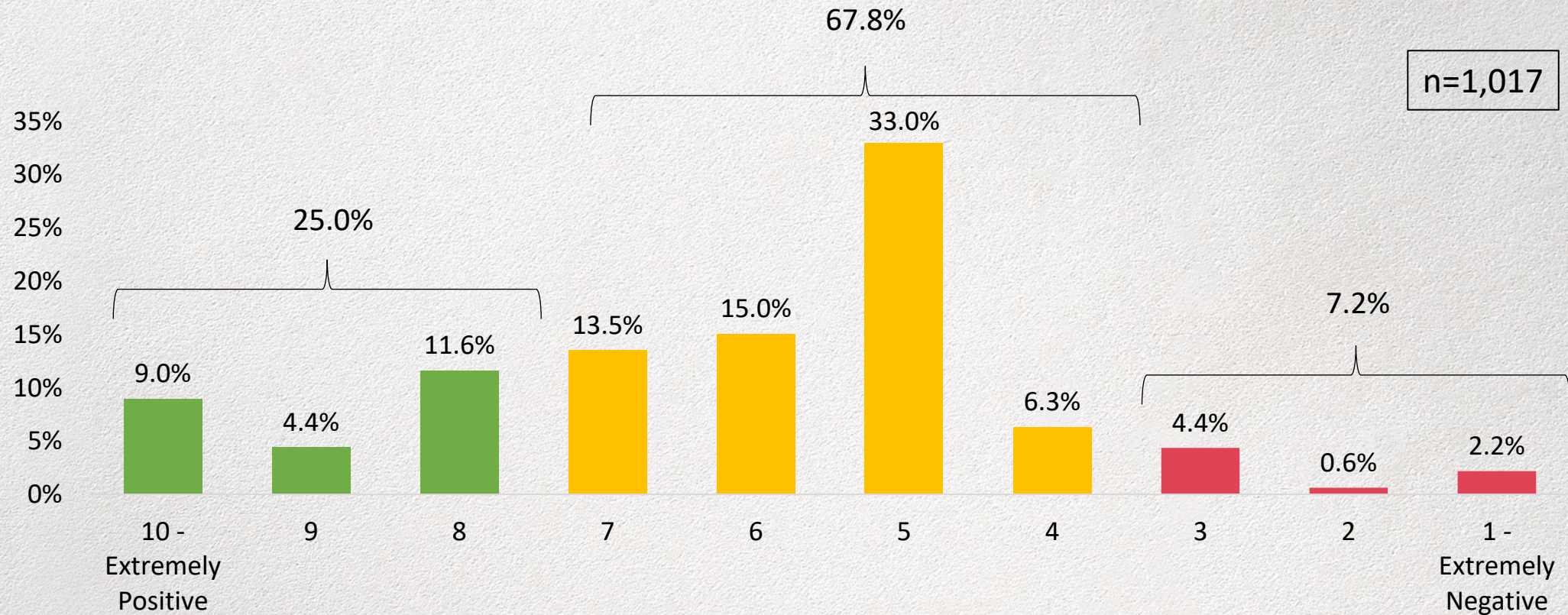
D10. How much do you agree or disagree that in general, tourism has brought more benefits than problems to Nebraska? Please use a 10-point scale where 1 means "Do not at all agree," and 10 means "Completely agree."



Whether Household Has Higher Standard of Living Because of Tourism



Impact of Tourism on Household



D12. How would you rate the overall impact tourism has on you and your family? Please use a scale where 1 means "Extremely negative," and 10 means "Extremely positive." If you feel tourism has minimal or no impact on you and your family, please select a number toward the middle of the scale.

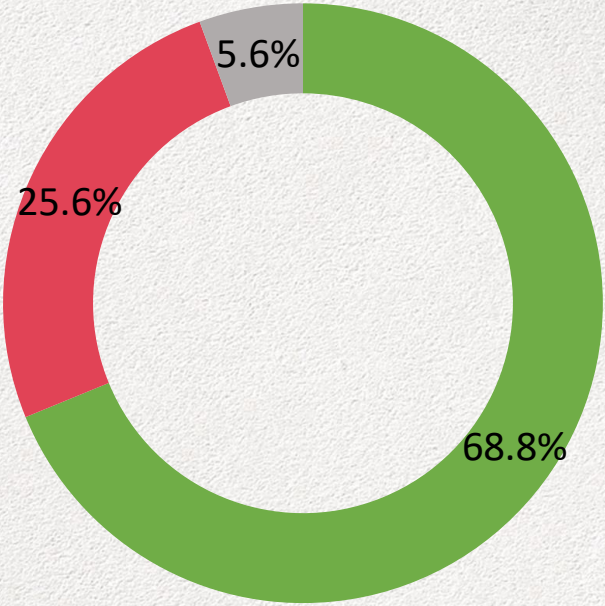


Awareness and Familiarity with the NTC



Awareness of the Nebraska Tourism Commission

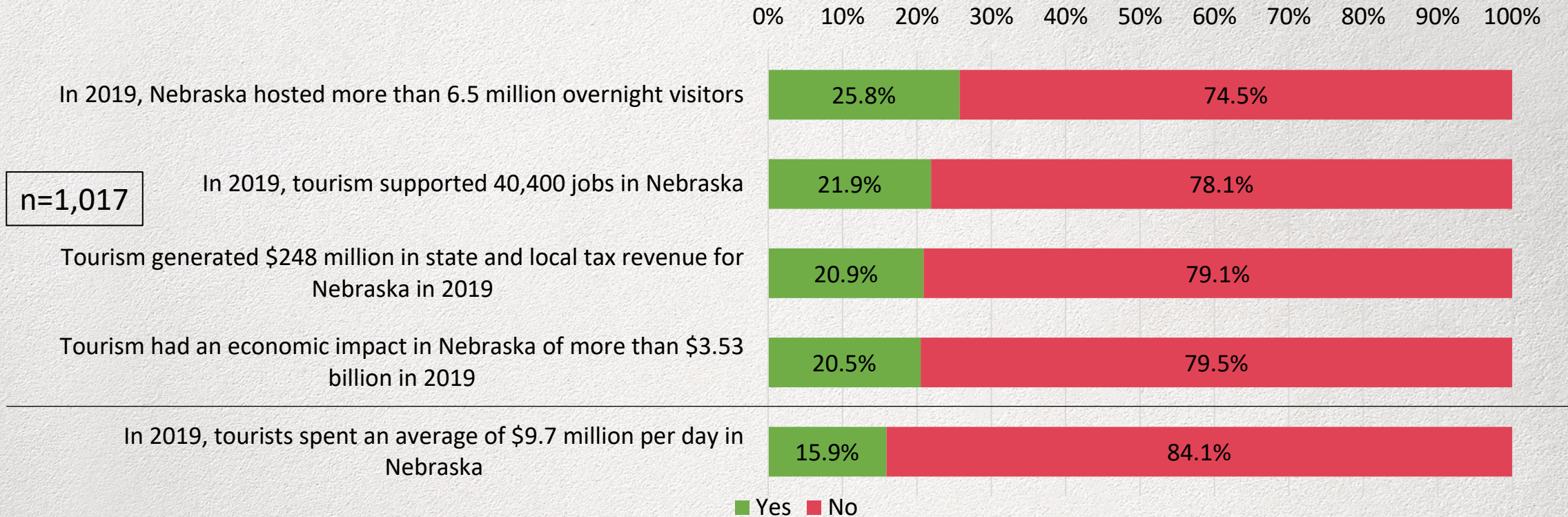
n=1,017



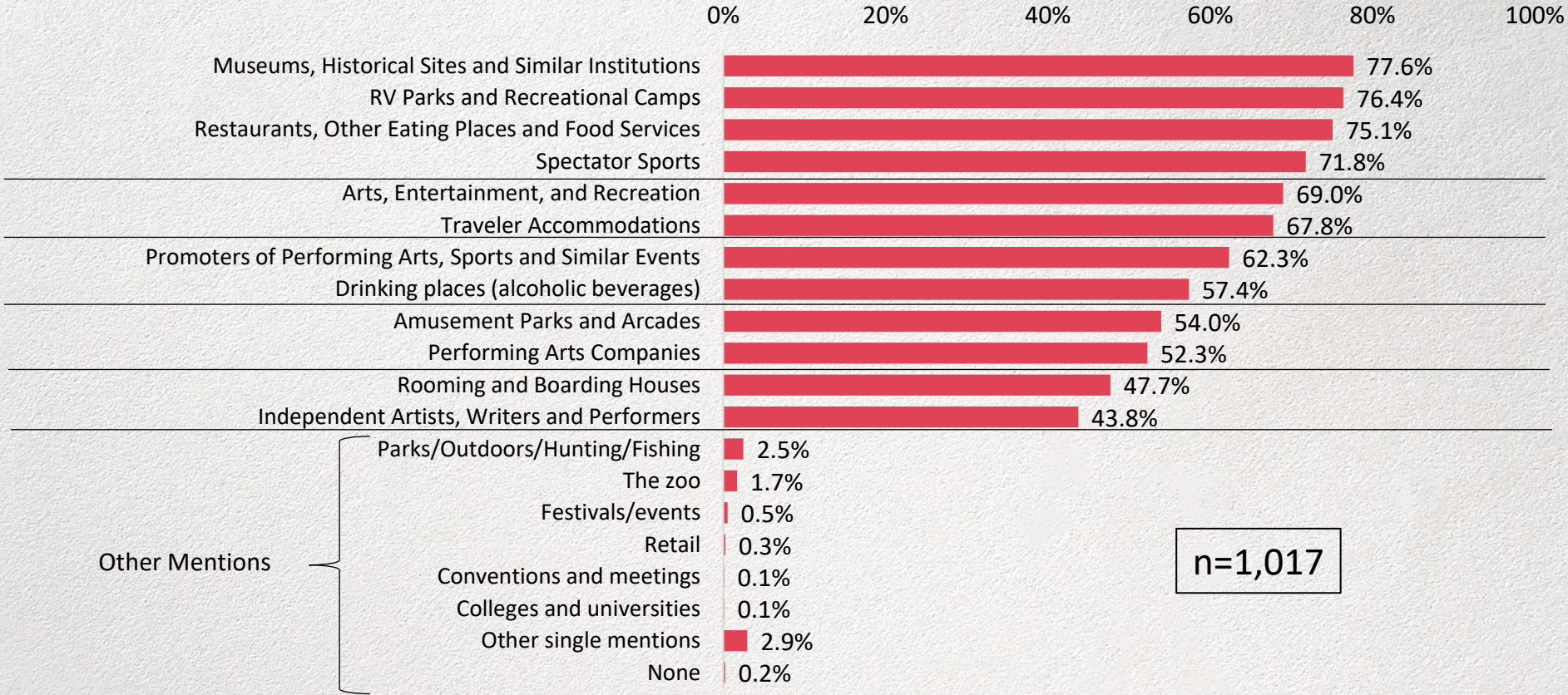
■ Yes ■ No ■ Don't remember



Awareness of the NTC's Tourism Outcomes



Sectors Considered to be Part of the Tourism Industry

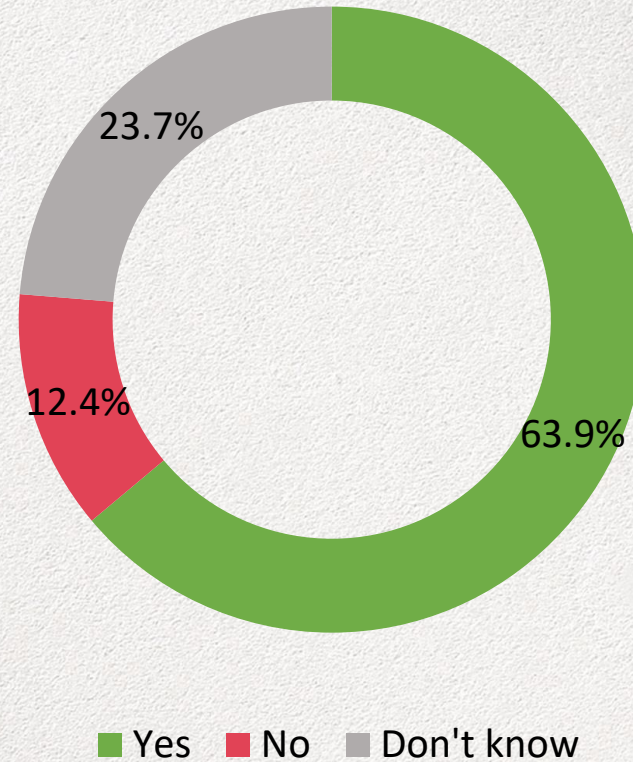


E3. Which of the following do you consider to be part of the tourism and hospitality industry in Nebraska? Please check all that apply.



Favorability of Expanding Tourism Funding

n=1,017

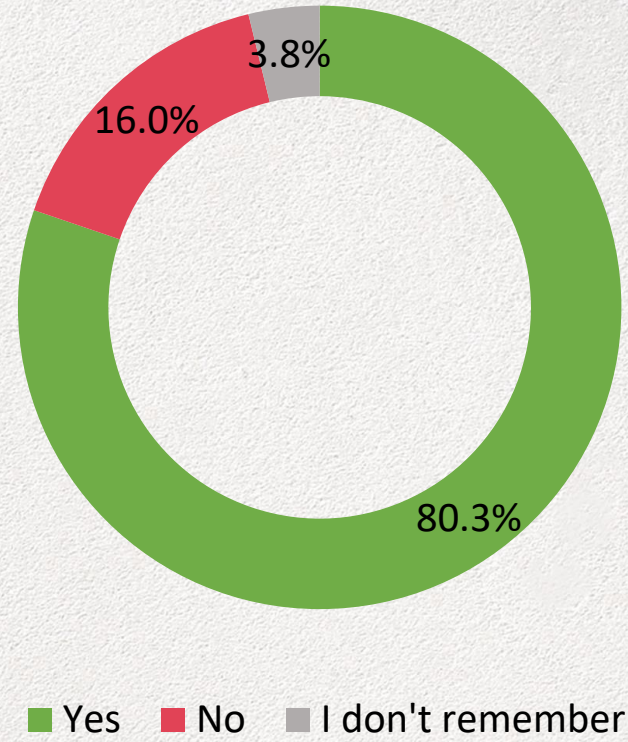


Vacationing and Promoting Travel in Nebraska

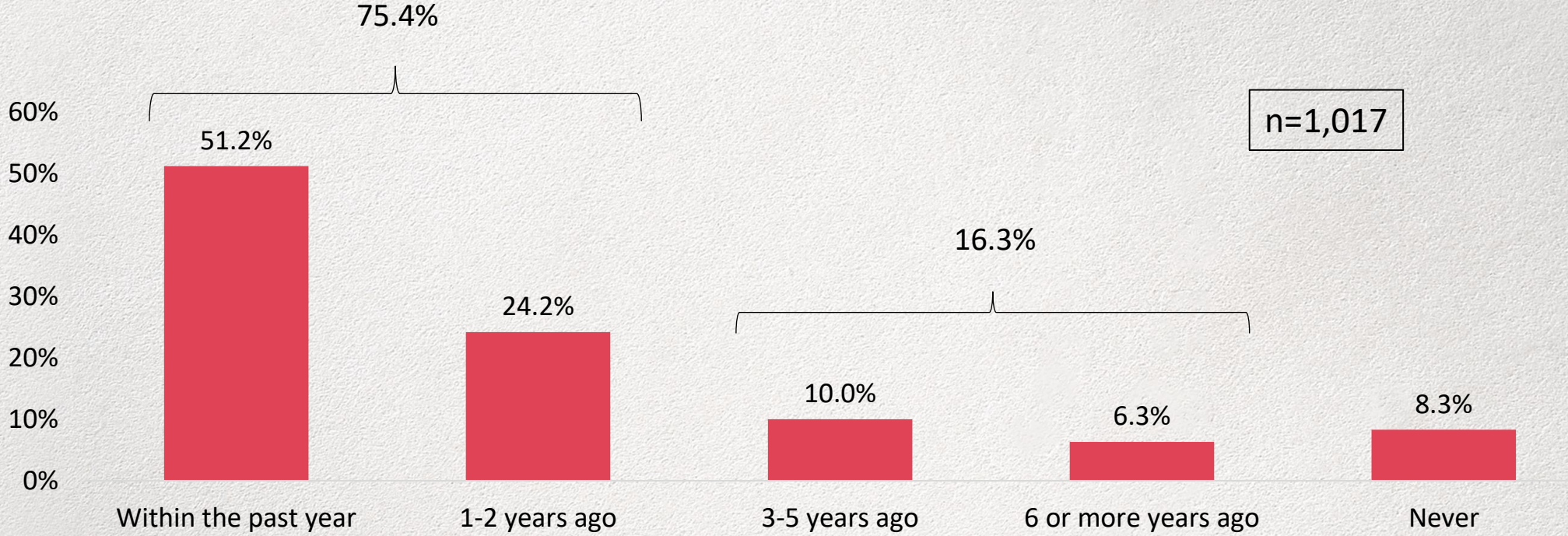


Whether Encouraged Visitation

n=1,017



Vacationing in Nebraska



F2. How recently, if ever, have you vacationed or taken a leisure trip in Nebraska, that is, a trip that involved traveling at least 50 miles from home?



Implications and Considerations



Reinforce and build upon the solid sentiment foundation that exists among residents

- Residents have positive sentiment toward tourism overall which is a strong foundation upon which to build greater advocacy:
 - Three fourths are positive toward tourists in their community
 - Three fourths think tourism in Nebraska is non-existent, in its infancy stage or in adolescence with obvious room for growth
 - 7 in 10 want more tourists in their area (this far exceeds national norms)
 - 6 in 10 strongly believe tourism brings more benefits than downsides (on par with national norms)
- A majority have a fundamental understanding of the benefits tourism brings to the state—economic stimulation is the number one category of open-ended responses about the benefits of tourism.
- Likewise, over half say it is a source of tax revenue for the state, boosts sales of Nebraska-made products, encourages investment in local Nebraska economies, and increases Nebraska’s reputation in the business sector.
- Moreover, the perceived downsides of tourism are predominantly about the industry itself, rather than any personal negative impact (e.g., crowding, crime, disrespect):
 - Want more balanced promotion across the state
 - Need more promotion of NE overall
 - Need more attractions
 - Believe there are misperceptions of the state (it’s only I-80)
 - Infrastructure issues



Recognize the strong sentiment that exists compared to US norms

- Sentiment among Nebraska residents is on par with national norms from Longwoods on several factors:
 - Importance of tourism to my local economy (51% vs. 52%)
 - Tourism encourages investment in local economy (55% vs. 51%)
 - Without tax revenue from tourism, we'd pay higher taxes (45% vs. 46%)
 - My quality of life is improved because of tourism (42% vs. 42%)
 - Long term planning can limit environmental impacts cause by tourism (48% vs. 50%)
 - Tourism brings more benefits than problems (60% vs. 55%)
- Nebraska exceeds national norms in several areas:
 - Tourism is causing a disruption or loss of our local traditions, culture and heritage (7% vs. 30%)
 - Overbuilding of tourism businesses is spoiling our natural areas (11% vs. 36%)
 - Tourism causes an increase in crime and social problems (12% vs. 26%)
 - Tourism is responsible for increasing our cost of living (12% vs. 33%)
 - Tourism creates mostly low paying/seasonal jobs (22% vs. 44%)
 - I have encouraged others to visit my state (80% vs. 47%)
 - I would like to see more tourists coming to my area (70% vs. 47%)
 - Shopping is better because of tourism (57% vs. 42%)
 - Funds should be spent to promote tourism in Nebraska (45% vs. 35%)
- Nebraska only falls below national norms in one area, but it's a critical gap
 - My household has a higher standard of living because of tourism revenue (19% vs. 29%)



Be mindful of gaps and opportunities

- Despite the solid foundation, there is a clear opportunity to encourage residents to see tourism as more important to the state than they currently do, particularly from an economic point of view. While tourism is on par with a myriad of other industries, just half of resident think tourism is important, and only 22% say it's one of the three most important economic engines for the state.
 - In this vein, it will be important to more effectively harness those that work in tourism as ambassadors—while those that do have higher sentiment, this is not necessarily converting to a high degree of advocacy, agency or influence.
- Communication of other benefits should be bolstered. The NTC needs to continue to demonstrate that it respects the quality of life of Nebraska residents by encouraging potential visitors to look at the things residents' value most about living in the state in a new way, and to try them out for themselves:
 - Pace of life
 - Recreation opportunities
 - Safe, rural environment
 - Spaciousness, uncrowded, cleanliness
- The NTC needs to do a better job of educating residents on their role and business outcomes:
 - 26% of residents are unaware of the NTC
 - Only 10%-30% know about the NTC's outcomes
 - 29% think local elected officials recognize the value of tourism
 - 24% are unsure if NTC funding should be expanded



#1 goal: Make it personal

- The biggest gap which needs to be closed is to make the impact of tourism personal:
 - 19% believe tourism has made their household have a higher standard of living
 - 1 in 4 say tourism has a positive impact on them personally and their family
 - 35% agree that tourism makes them more connected to their community
 - 44% agree that without tax revenue from tourists they'd have to pay higher taxes (though this is on par with US norms)
 - 42% say tourism enhances their quality of life (also on par with US norms)
 - 5 to 6 in 10 feel a sense of pride created by tourism

Appendix



Sampling Differences

- Differences observed between Qualtrics panel and Facebook ad respondents:
 - Panel respondents are more likely to be from the Metro region, younger, lower educated and lower income, have children, and of a race/ethnicity other than white. They are also more likely to be female and single or divorced.
 - FB ad respondents are more likely to be from the Southeast, Southwest, and Sandhills regions, older, higher educated and higher income, retired, without children under 18, white, male and married. Ad respondents are also more likely to have lived in Nebraska longer (41+ years) compared to those from the panel.
 - In general, FB ad respondents are more positive about Nebraska and its tourism industry. They are more likely to find the majority of Nebraska industries to be important (including tourism), and are more positive toward tourism in their attitudes, perceptions and beliefs. They are also more likely to feel positive toward tourists and desire more tourism in their communities (while panel respondents are more likely to feel neutral and prefer the same level of tourism).
 - FB ad respondents are more likely to say they were aware of the NTC prior to taking this survey (not surprising given that the ad was on the Visit Nebraska Facebook page). They are also more likely to have encouraged someone to visit Nebraska and are more likely to have taken a leisure trip themselves within the state in the past year.
- It is likely that the psychographic differences between sample sources is a function of differences in the demographics between them, with age/life-stage being the biggest factor. The main reason for age differences between sources is that we achieved a huge response from the older population via the FB ad early in fielding (the younger population was less responsive to the FB ad), so we requested that the Qualtrics panel provider target younger residents to balance out age within the total sample.



Respondent Profile: Demographics

		n = 1,017
Age	18-24	8.7%
	25-34	14.4%
	35-44	14.2%
	45-54	15.9%
	55-64	19.6%
	65+	27.3%
Gender	Male	36.2%
	Female	63.1%
	Other	0.7%
Marital Status	Single	22.5%
	Married	56.7%
	Divorced/separated	10.0%
	Other	10.8%
HH Size	1, myself	20.0%
	2	43.7%
	3+	36.4%
Presence of Children	Has Children in Household	34.2%
	Does Not Have Children in Household	65.8%
Work in Tourism Industry	I am/family member is employed in the tourism industry	12.0%
	Not employed in the tourism industry	88.0%
Length of Residence	0-5 years	8.9%
	6-20 years	14.7%
	21-50 years	42.8%
	51+ years	33.5%

		n = 1,017
Education	High school diploma/GED or less	14.3%
	Vocational/Technical school	5.3%
	Some college/Associate's degree	28.1%
	Bachelor's degree	30.4%
	Master's/Doctoral/Professional degree	21.3%
Employment	Full-time	41.7%
	Part-time	8.2%
	Retired	30.4%
	Unemployed	8.4%
	Other	11.3%
HH Income	Under \$25,000	13.9%
	\$25,000-\$49,999	19.4%
	\$50,000-\$74,999	18.3%
	\$75,000-\$99,999	14.1%
	\$100,000-\$149,999	15.4%
	\$150,000 or more	8.1%
	Prefer not to say	10.9%
Race/Ethnicity	Caucasian/White	89.5%
	Hispanic/Latino	4.4%
	African American	3.4%
	Asian	3.0%
	All Other	3.3%

Unweighted data shown.

