



Understanding the Pulse of Your Residents

A First Look the 2023 National Resident Sentiment Studies for Canada and the United States

Amir Eylon
October 11, 2023





AGENDA

- Highlights from the 2023 Studies
- What are we doing well?
- What do we need to improve?
- Q&A



WHO WE ARE

Established in 1978 as
a market research
consultancy

Headquartered in
Columbus, OH and
Toronto, ON

Focused on
tourism since
1985

Working with over
175 Destinations
and Brands

The logo for Longwoods International features the word "Longwoods" in a blue, sans-serif font. The letter "o" is replaced by a stylized globe icon. Below "Longwoods" is the word "INTERNATIONAL" in a smaller, green, all-caps, sans-serif font.

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 for our sixth year!**

...And Our Third Year in CANADA!



Canadian Destinations Leadership Council

WHY?

Because Resident Sentiment's importance as an "Essential Key Performance Indicator" continues to grow!

- **Destination Stewardship**
- **Sustainability**
- **Economic Development**
- **Master Planning**
- **Etc...**

Because No One Wants This Outcome...

Overtourism

Barcelona's Firing of Its Tourism Chief Reinforces Why Engaging Local Communities Matters

Dawit Habtemariam, Skift
October 19th, 2022 at 1:00 PM EDT

WARNING! I Have A Lot of Content!

- **I DO NOT get paid by the slide!**
- **I will move quickly!**
- **This presentation will be made available to you!**
- **So sit back, relax, and just listen...**



Meet Tammy Koerte

- **Senior Research Manager**
- **Lead On This Project**
- **Her Very First Destinations International Summit**
- **Let's Hear it For Tammy!**



Introduction and Methodology

Longwoods International's Resident Sentiment Research looks at public perceptions from all sides, including the positives and negatives of economic development, environmental impacts, overtourism, quality of life, and other areas.

This research will provide destinations with a unique opportunity to create a well-informed engagement strategy with locals on the subject of tourism in their communities. By understanding where public opinion lies from both positive and negative perspectives, destinations can work more effectively with local partners to increase support for tourism development efforts.

Self-completion surveys were completed with 1,000 adults (18 years and older) residing in Canada and 4,000 adults residing in the United States.

Fieldwork was completed in July 2023 for the US survey and August 2023 for the Canada survey.

Respondents are members of a major online consumer panel. Sample was drawn to be proportionate to population by geographies, age, and sex.

Data were weighted at tabulation to correct relative proportions based on actual population distribution of the selected geographic areas in terms of key characteristics (age, sex, income, household size, geography) as defined by the U.S. Census and Statistics Canada.

Methodology

United States

Fielded in July 2023

4,000 sample

Canada

Fielded in August 2023

1,000 sample



Tourism and...

- **Development and Growth**
- **Economy**
- **Employment**
- **Resident/Business/Workforce Attraction**
- **Quality of Life**
- **Tourism Promotion**
- **Environment**
- **Short-Term Rentals**
- **Sporting Events**
- **Resident Involvement/Engagement**

Generations

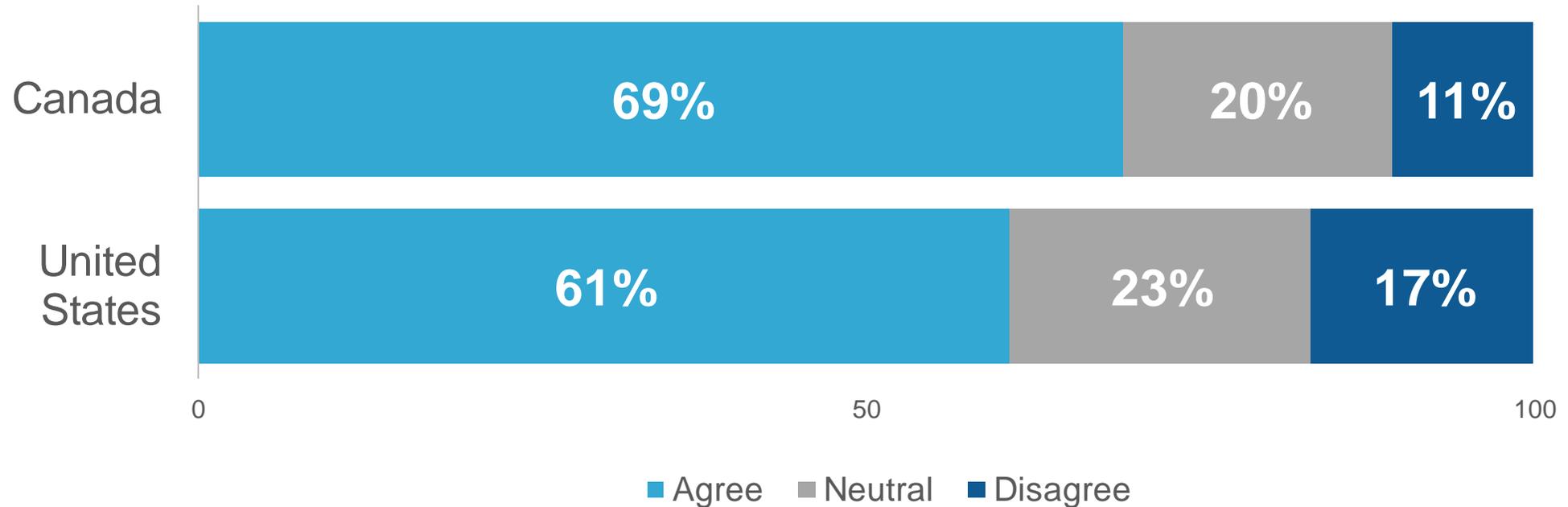
Generation Z	Millennials	Generation X	Boomers	Silent Generation
18 – 26	27 – 42	43 – 58	59 – 77	78+



Overall Sentiment About Tourism

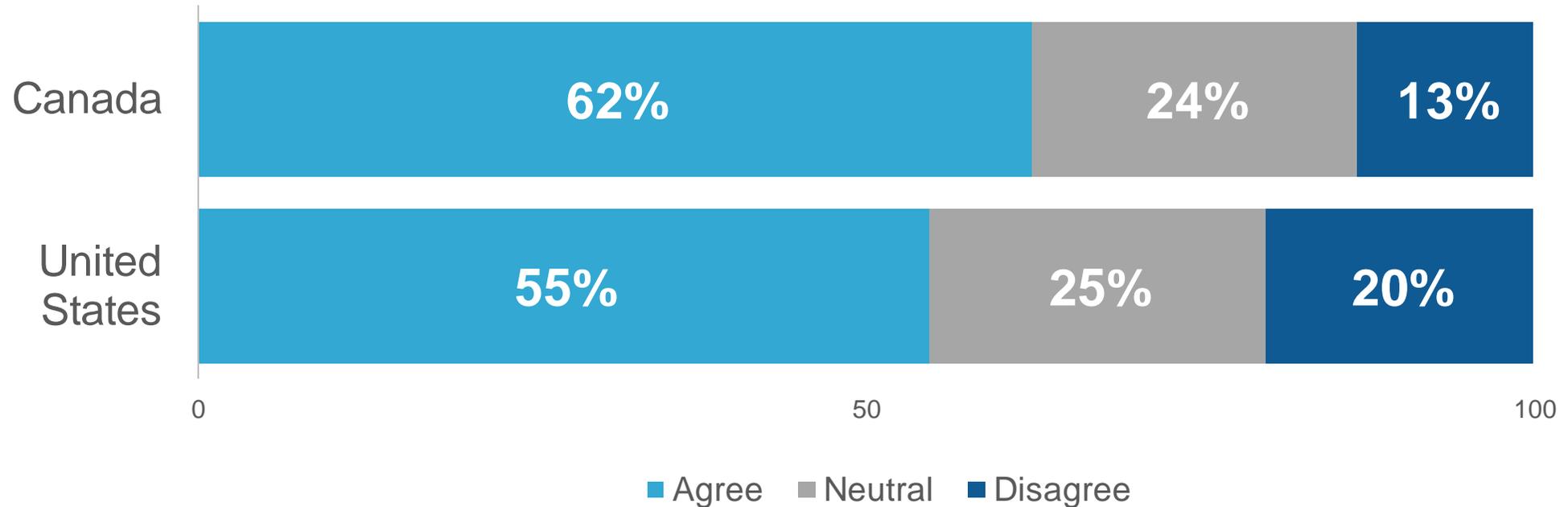
Overall Sentiment About Tourism

Overall, I think tourism is good for my local area



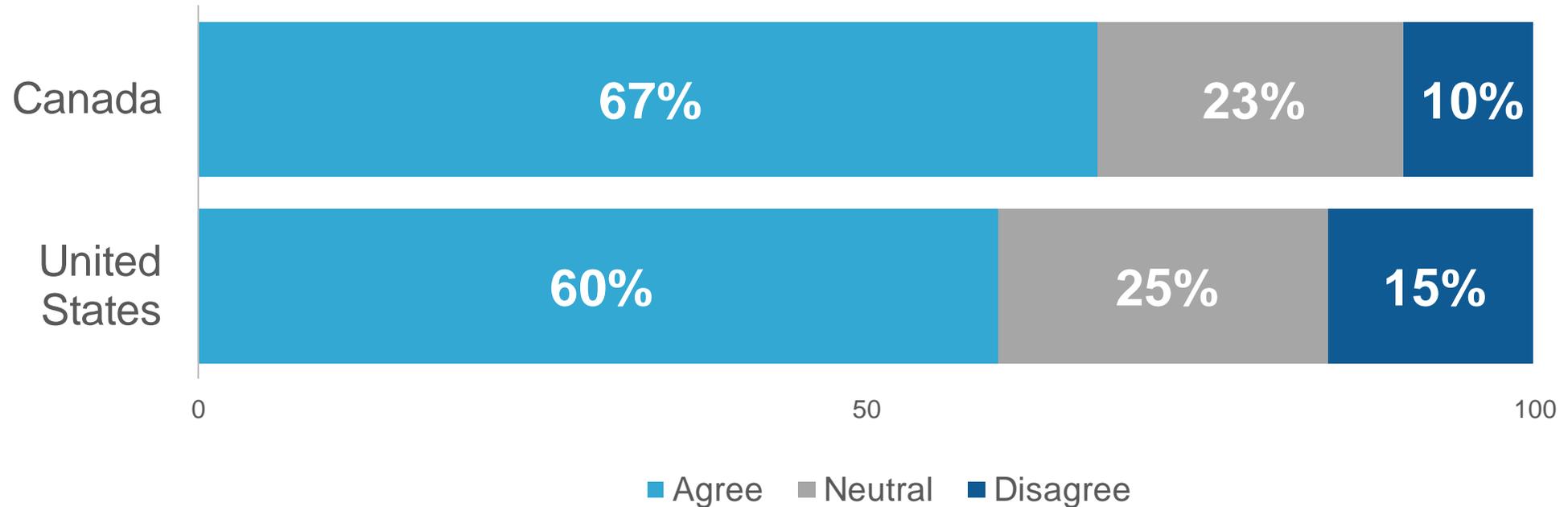
Overall Sentiment About Tourism

I want tourism to be important in my local area



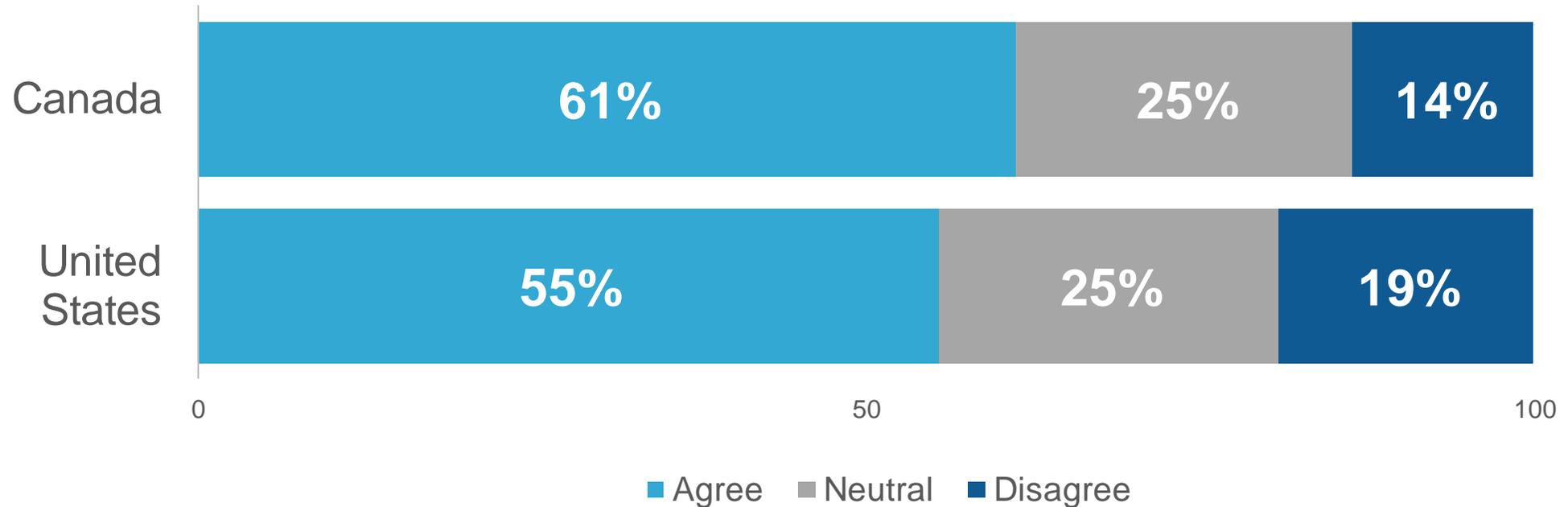
Overall Sentiment About Tourism

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



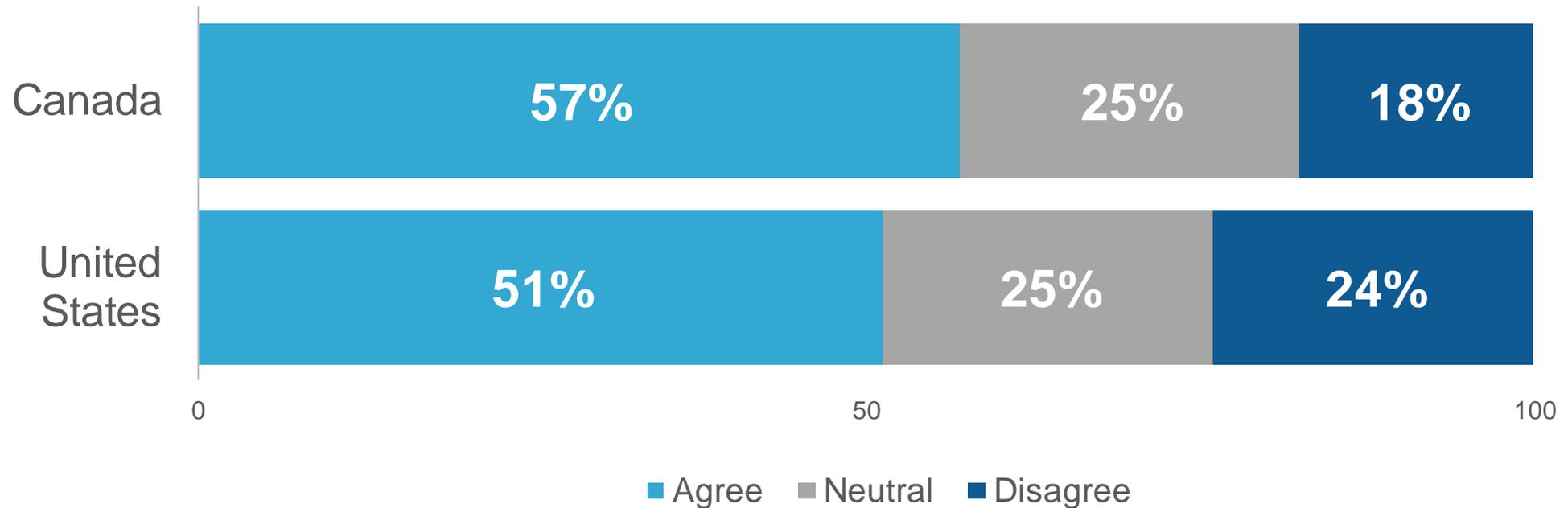
Overall Sentiment About Tourism

I care about the success of the tourism industry in my local area



Overall Sentiment About Tourism

My local area benefits from a strong tourism industry

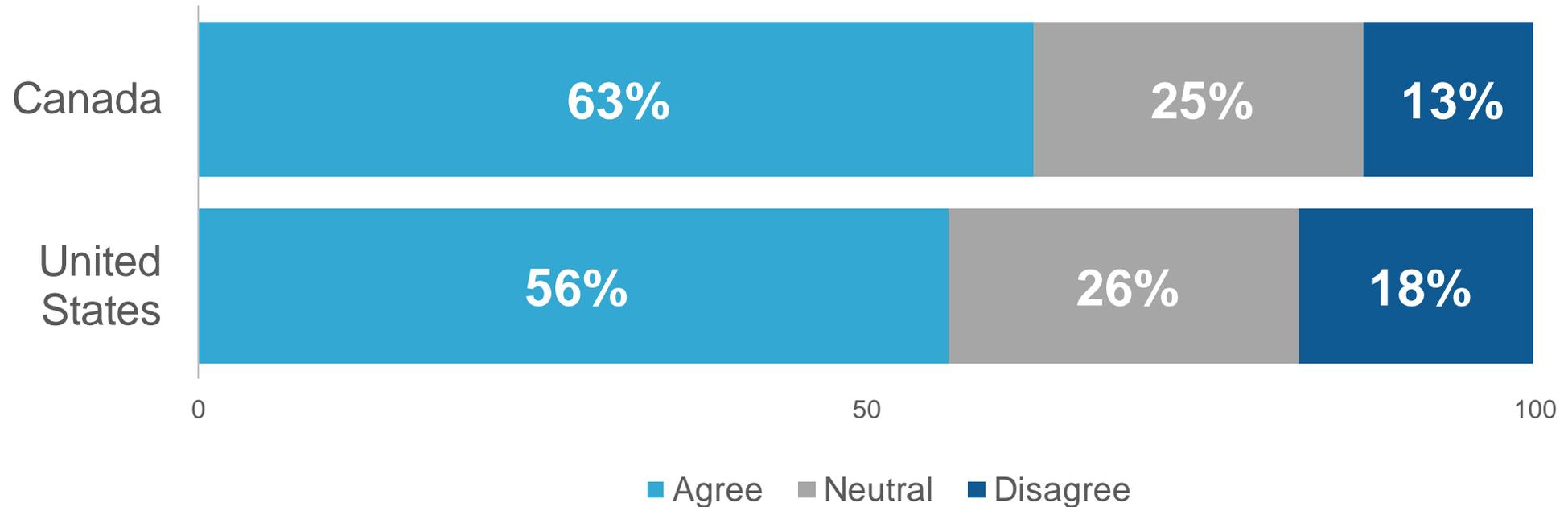


Involvement and Engagement with Tourism



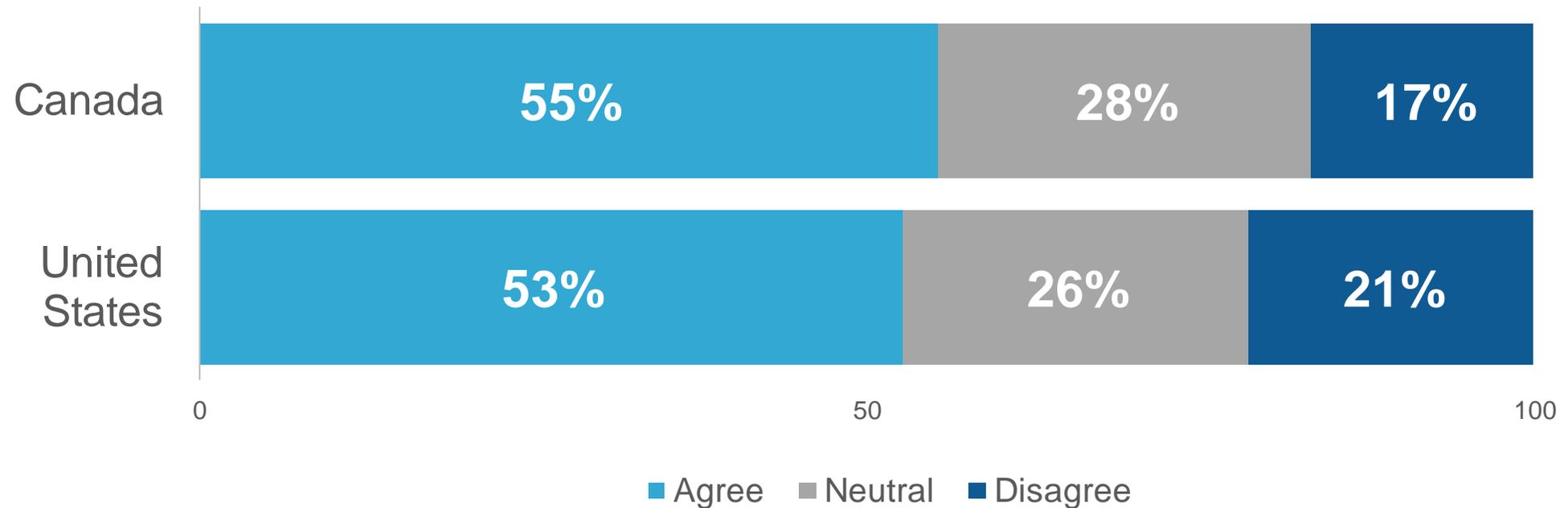
Involvement/Engagement with Tourism – **New in 2023**

I welcome tourists to this area



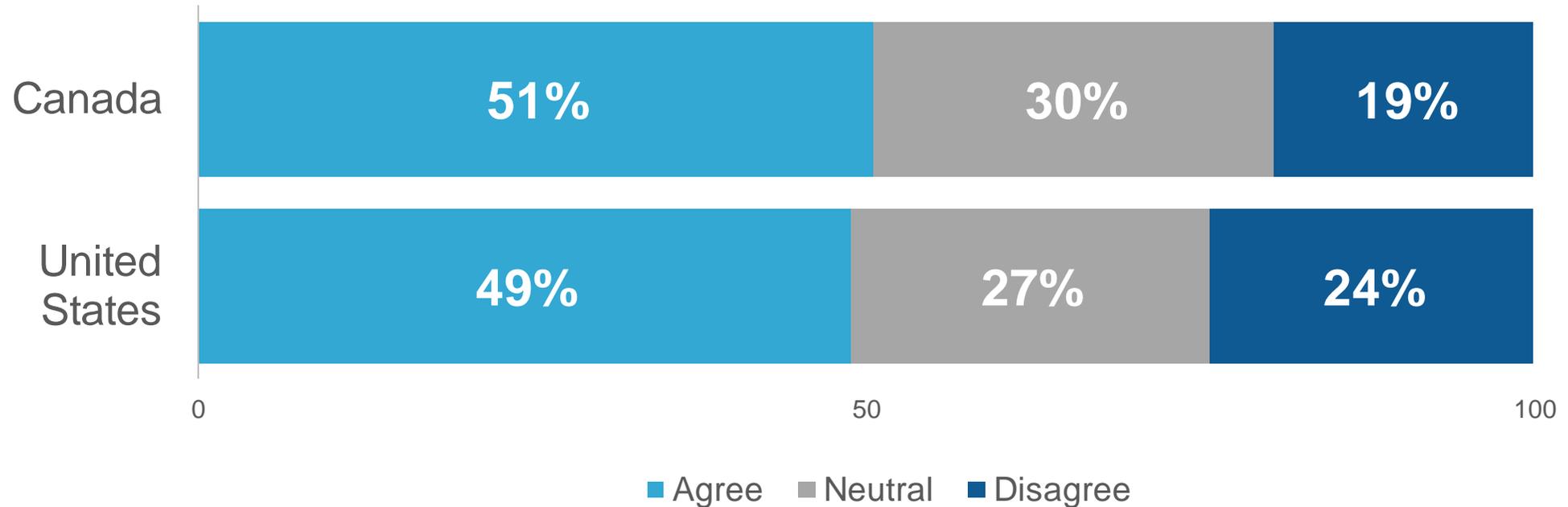
Involvement/Engagement with Tourism – **New in 2023**

I look forward to showing off this area when friends and family visit



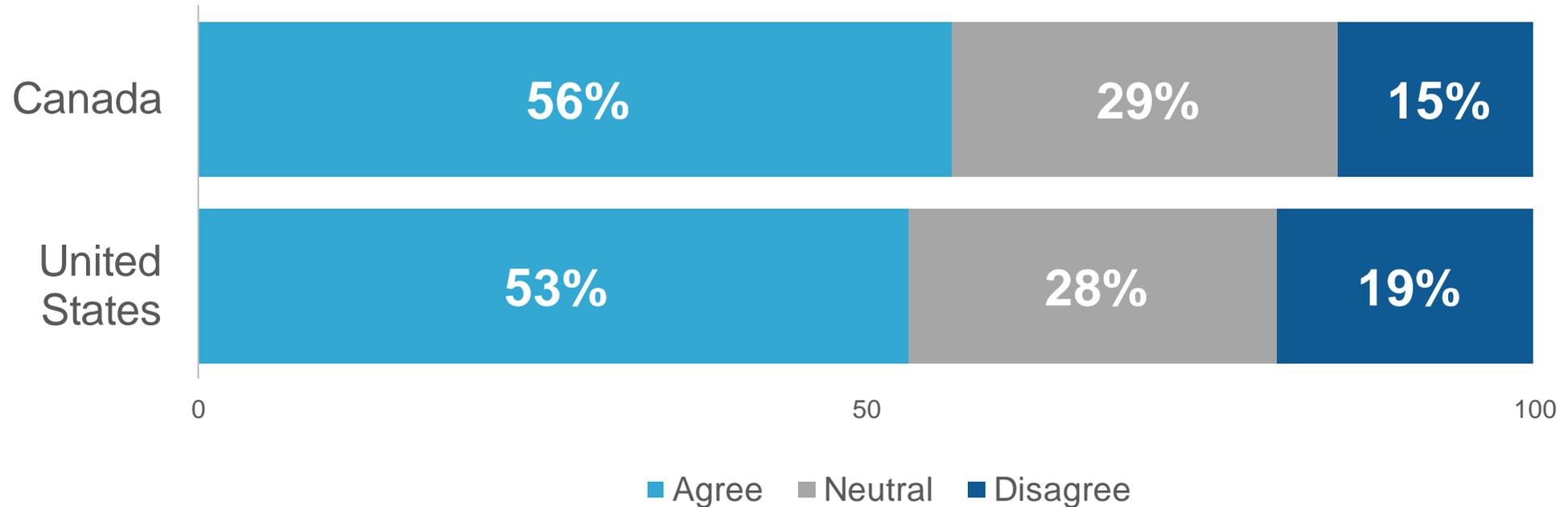
Involvement/Engagement with Tourism

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



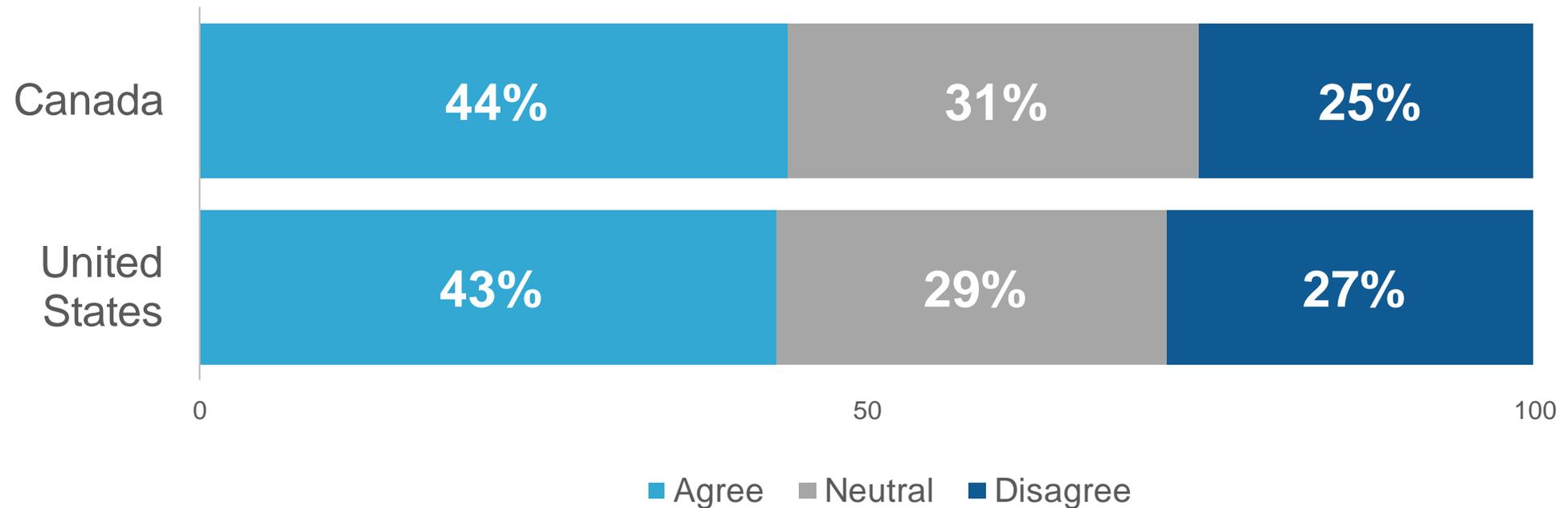
Involvement/Engagement with Tourism – **New in 2023**

I'm proud of what this area offers tourists



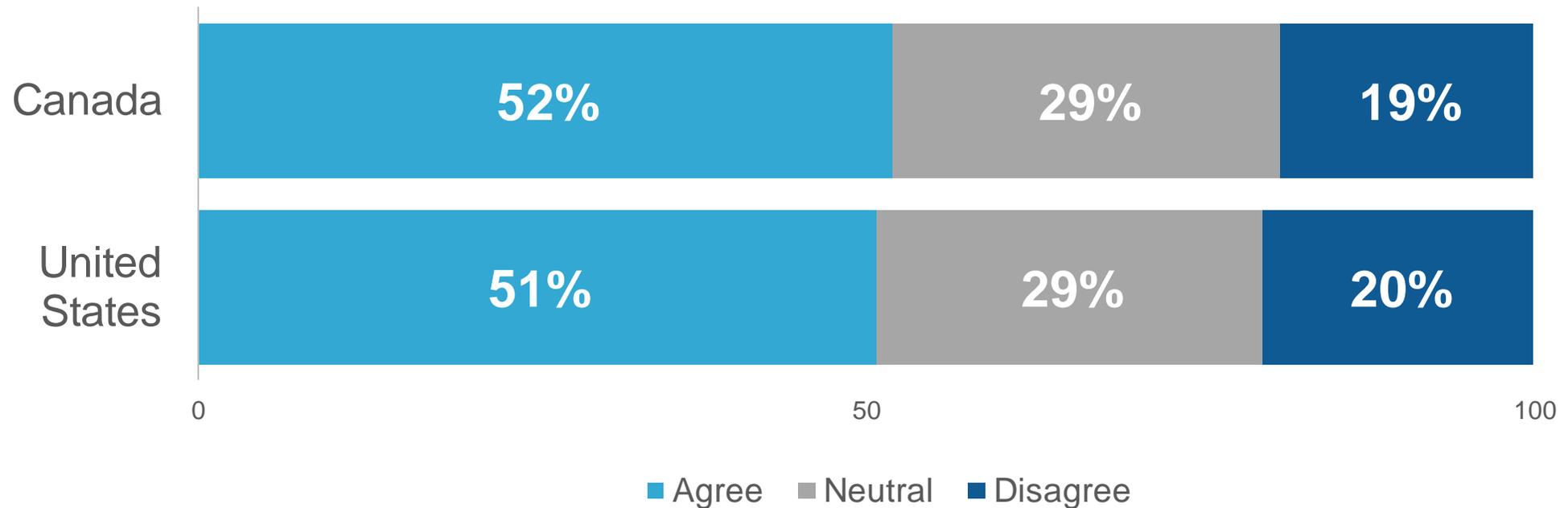
Involvement/Engagement with Tourism

I consider myself informed/up-to-date on news about tourism in this area



Involvement/Engagement with Tourism

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

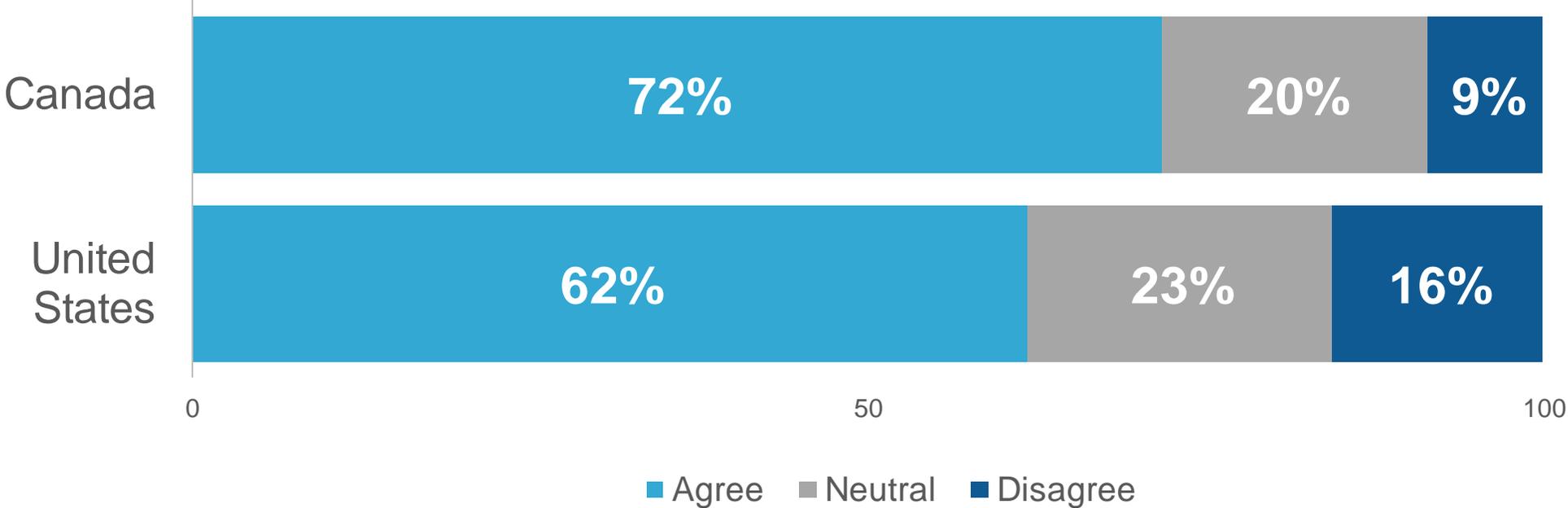




Tourism Development and Growth

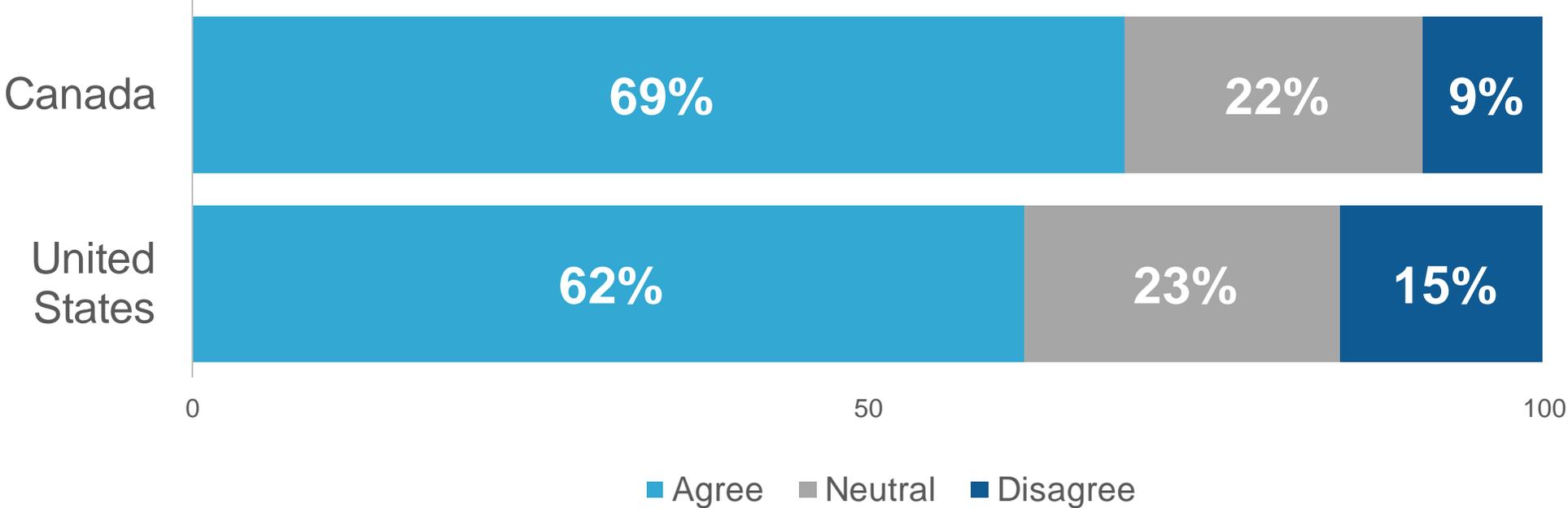
Tourism Development and Growth

I believe tourism should be encouraged here



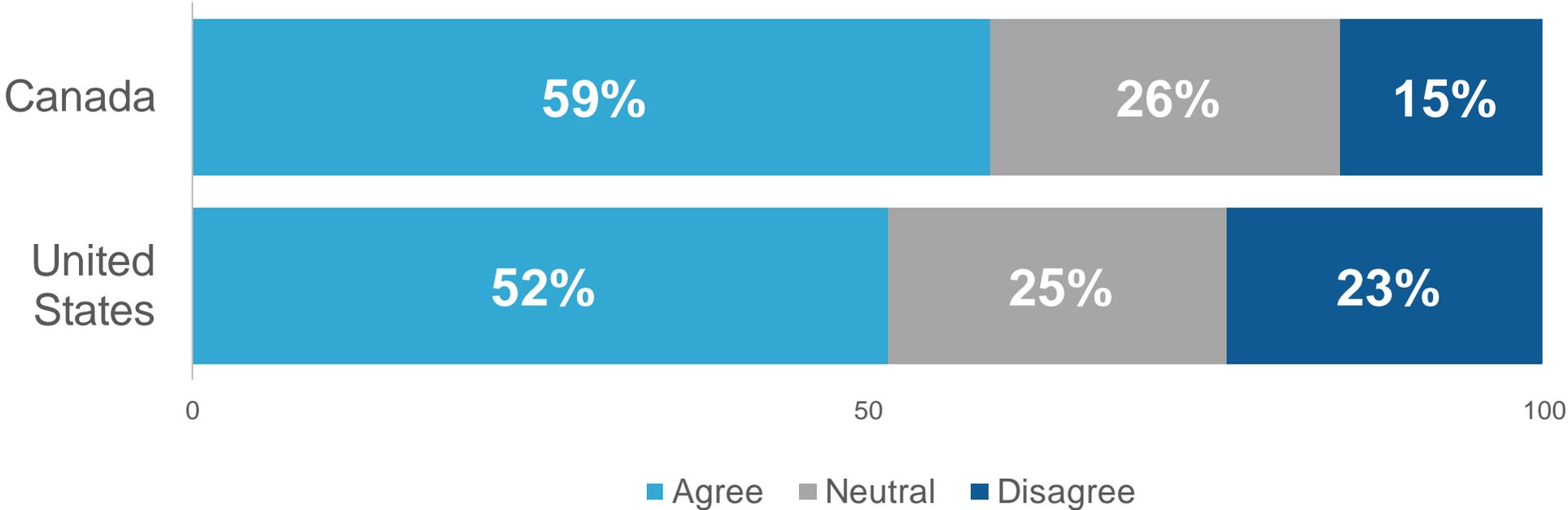
Tourism Development and Growth

I support tourism growth



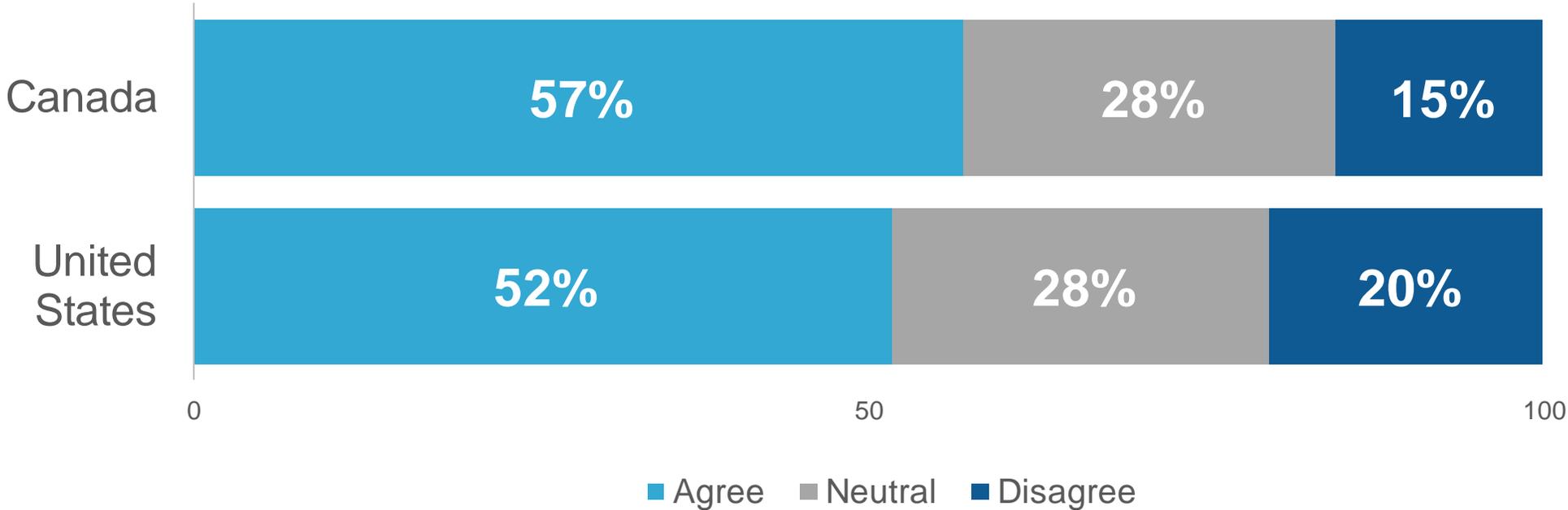
Tourism Development and Growth

I would like to see more tourists coming to my area



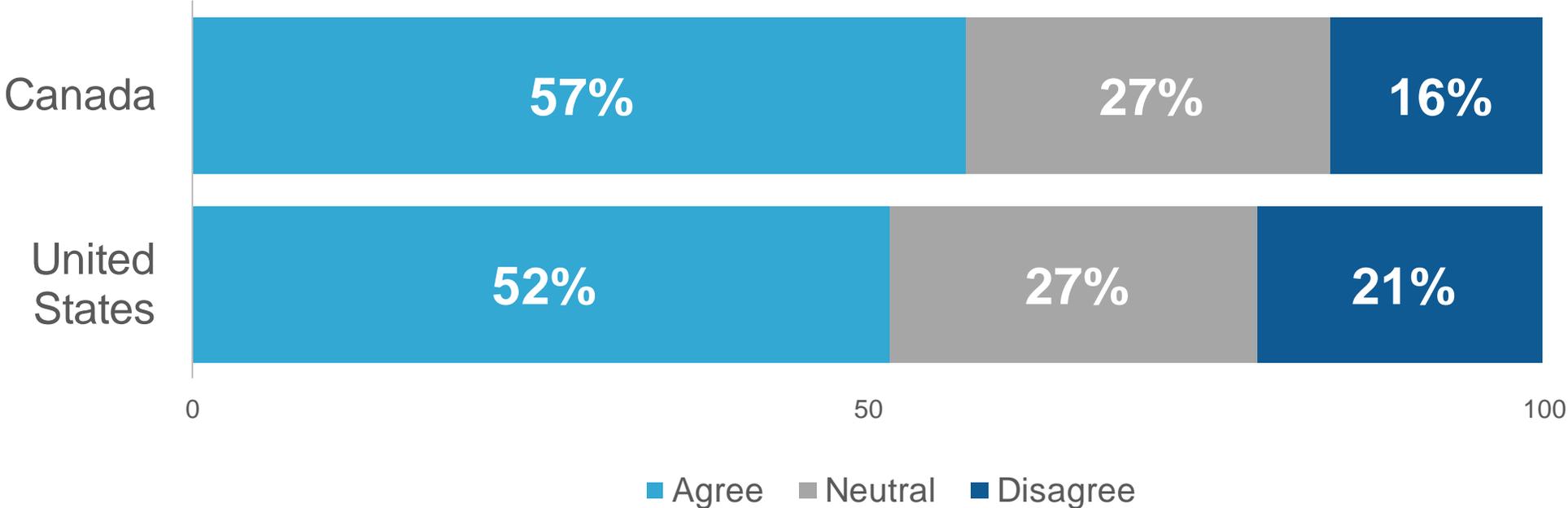
Tourism Development and Growth

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



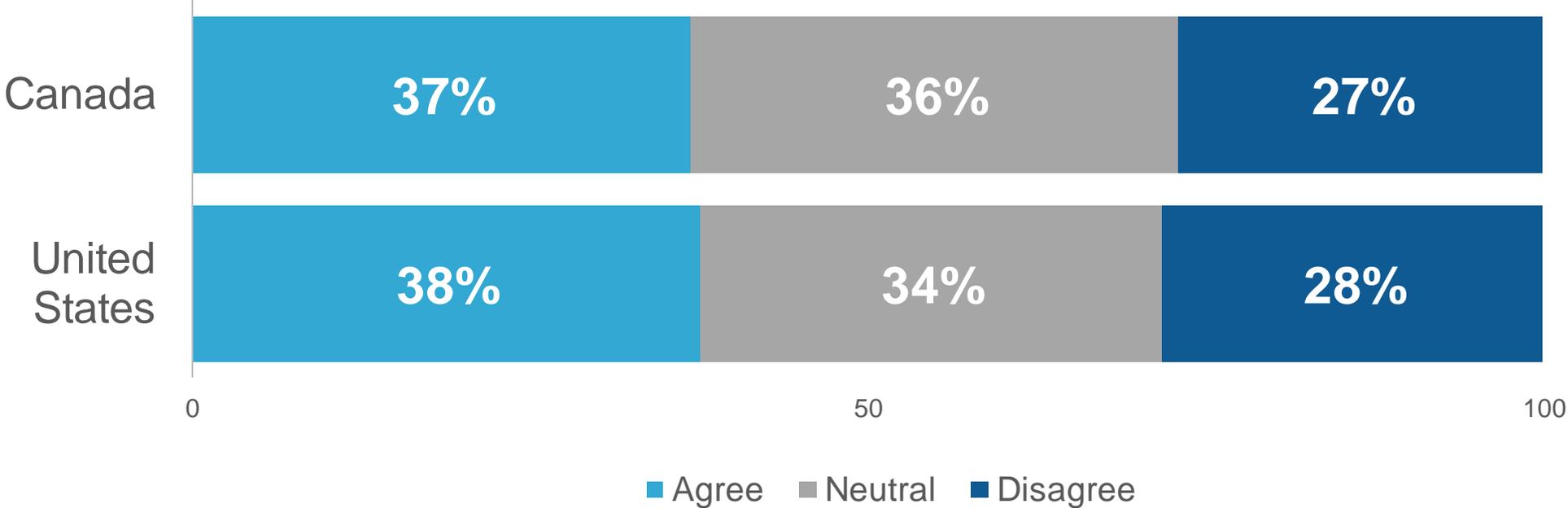
Tourism Development and Growth

I support building new tourism facilities that will attract visitors to this area



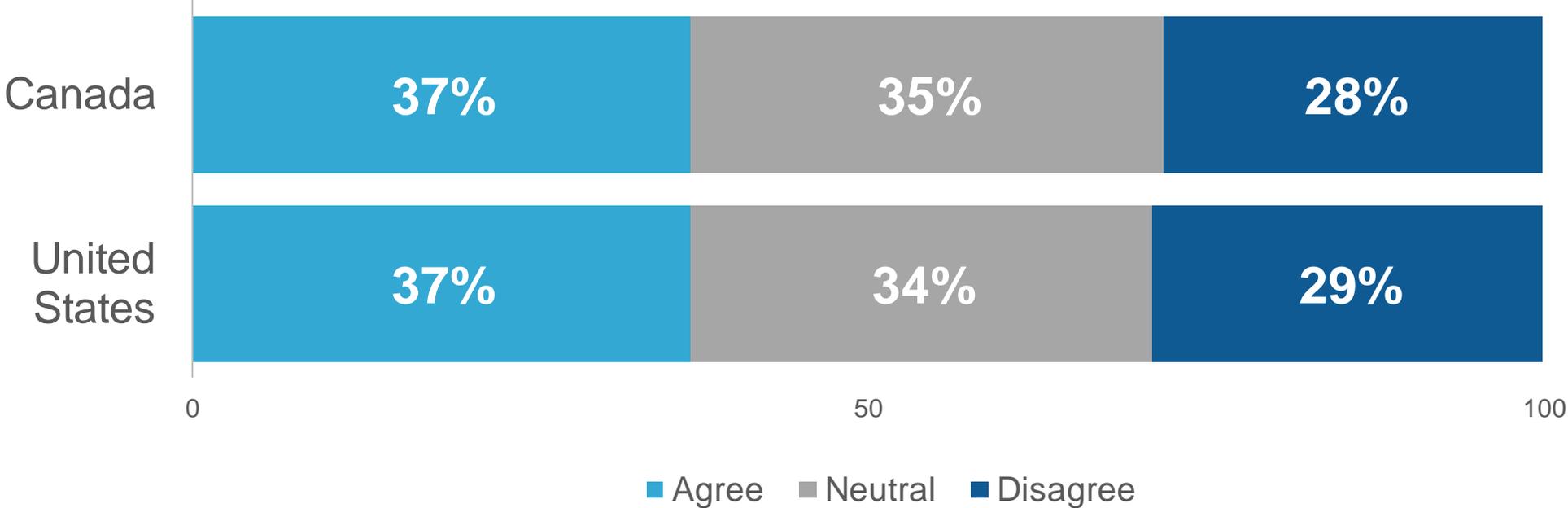
Tourism Development and Growth – **New in 2023**

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



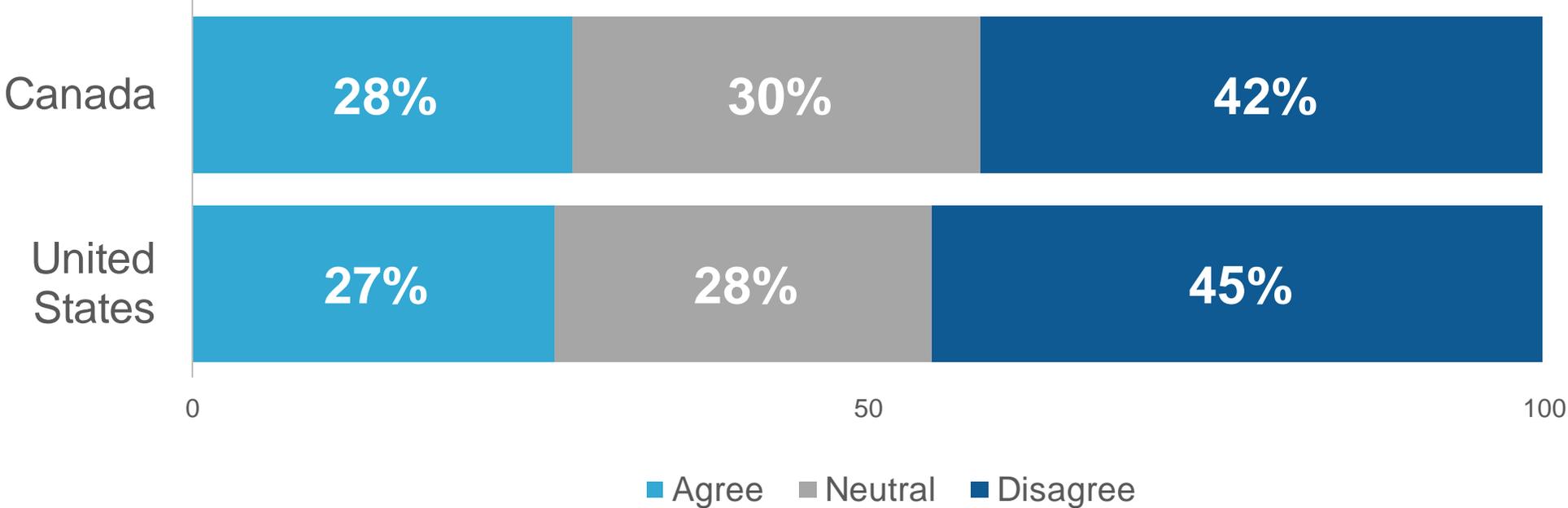
Tourism Development and Growth – **New in 2023**

My municipal/local government is doing a good job managing the pace of tourism development



Tourism Development and Growth

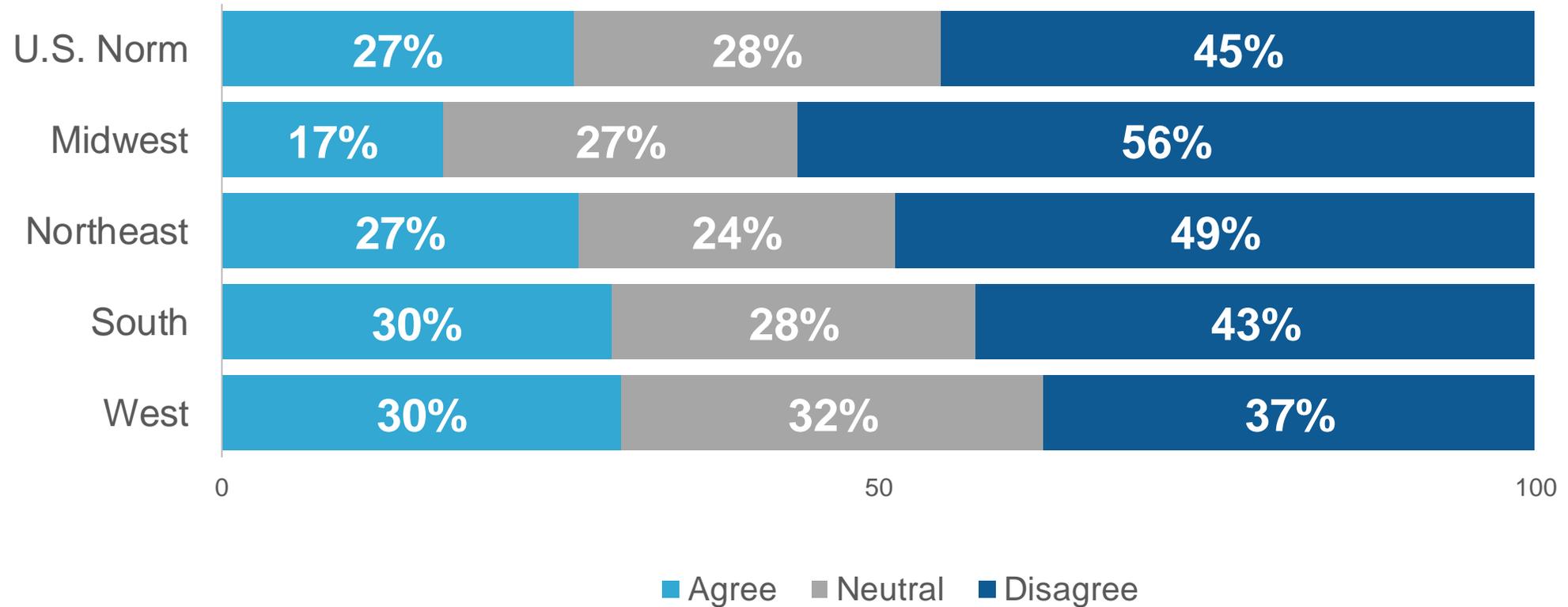
Tourism development is happening too fast in this area



Tourism Development and Growth

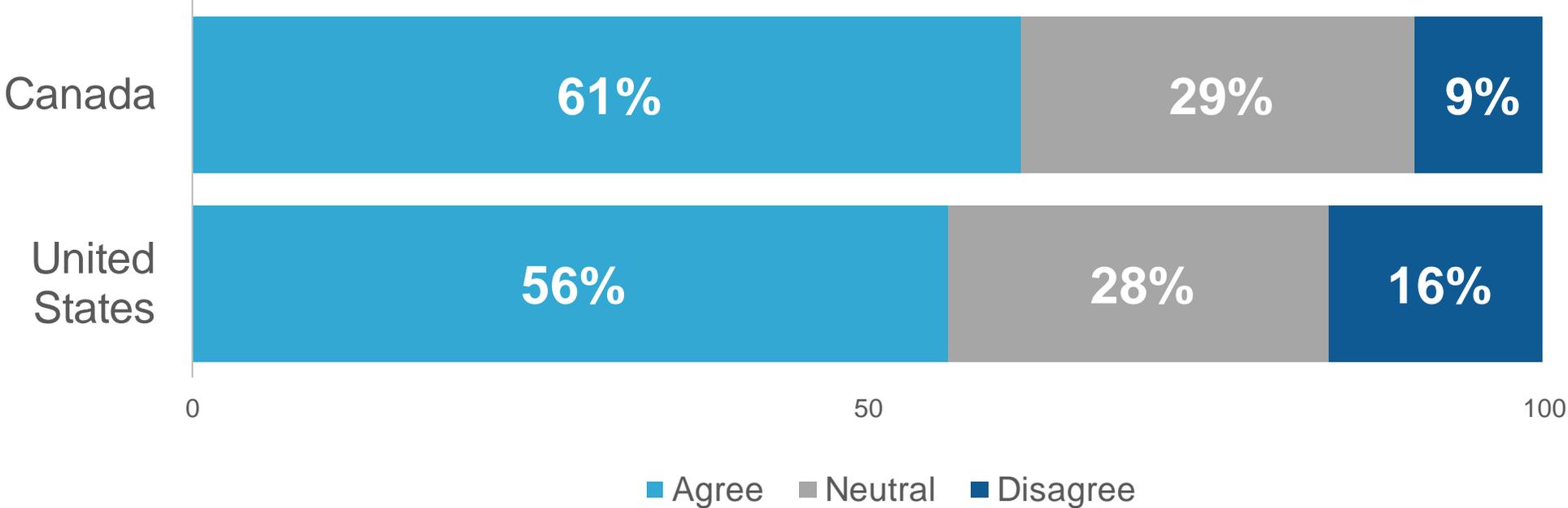
Regional Comparisons

Tourism development is happening too fast in this area



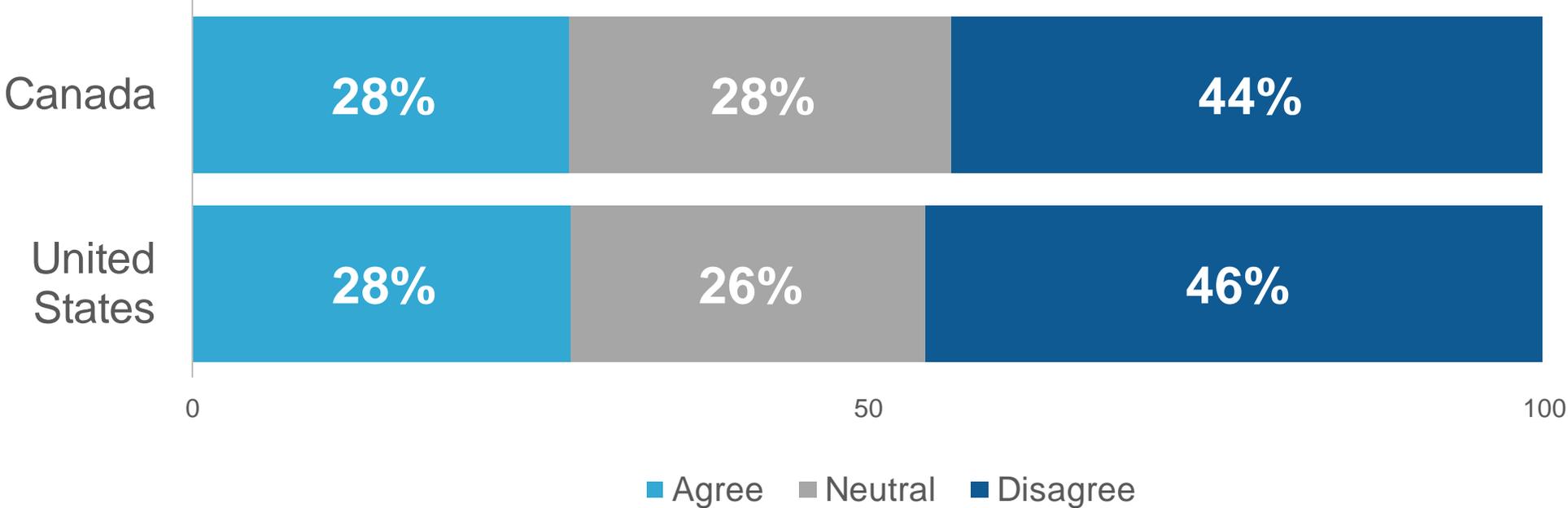
Tourism Development and Growth

We need planned and controlled tourism development



Tourism Development and Growth

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

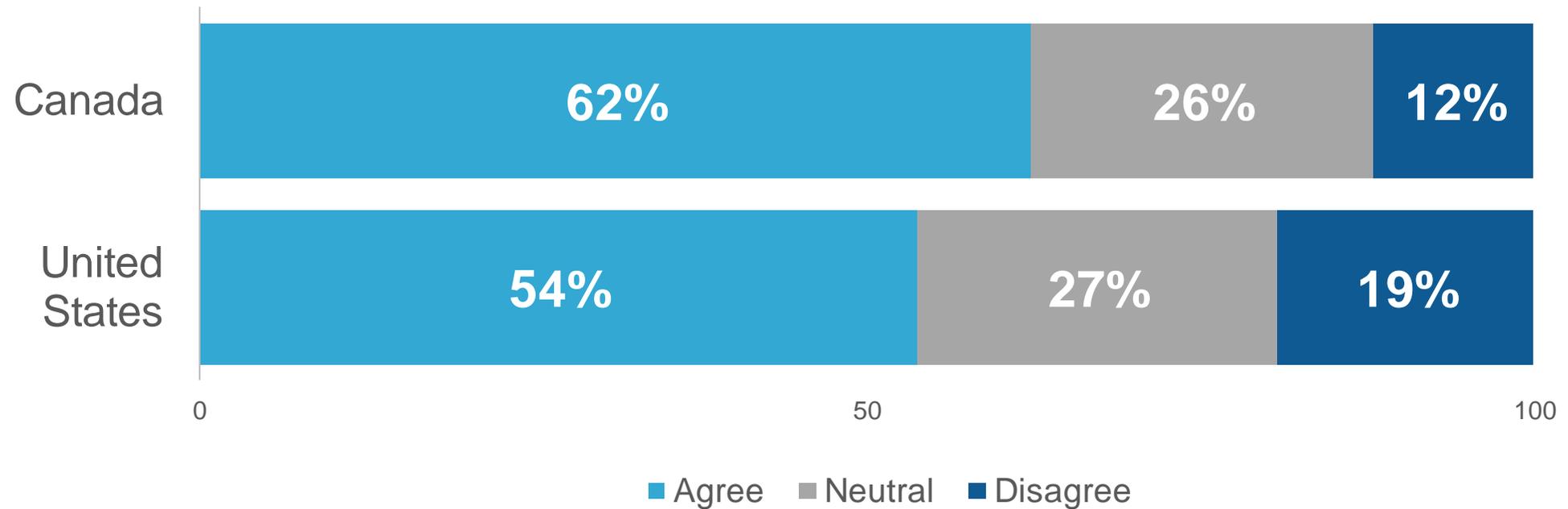




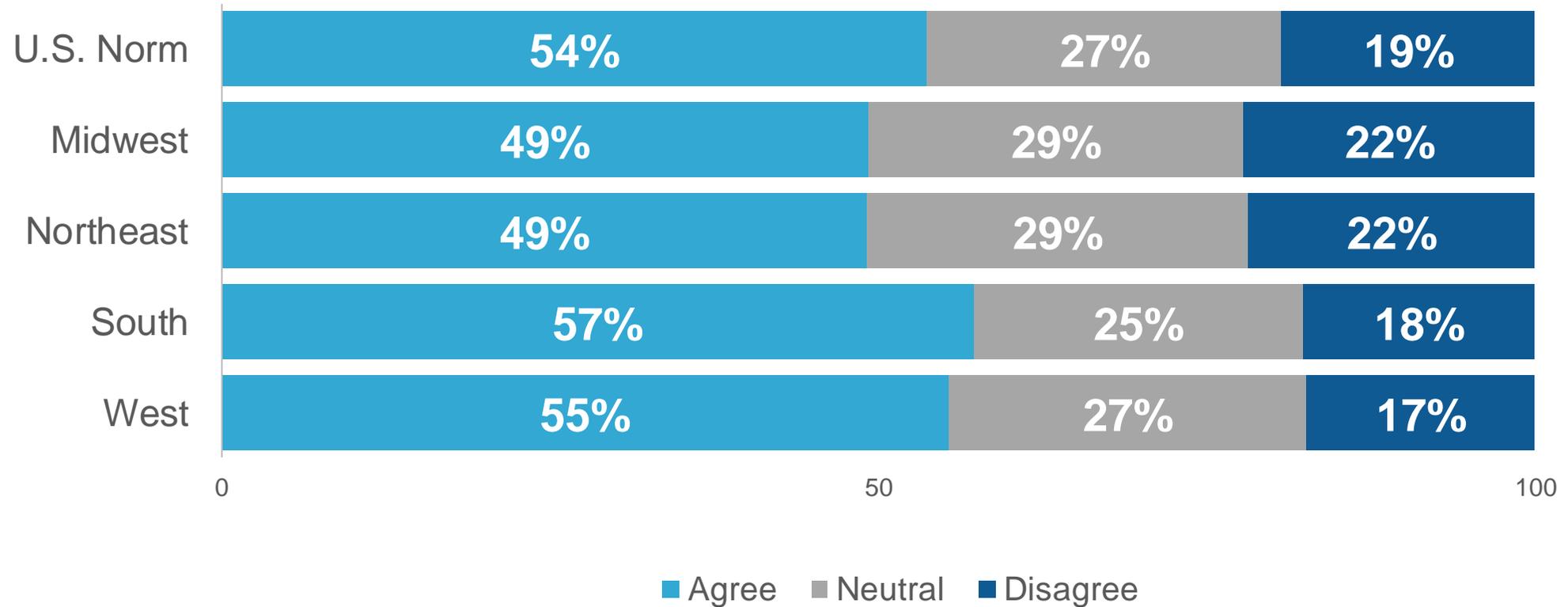
Longwoods
INTERNATIONAL

Economy

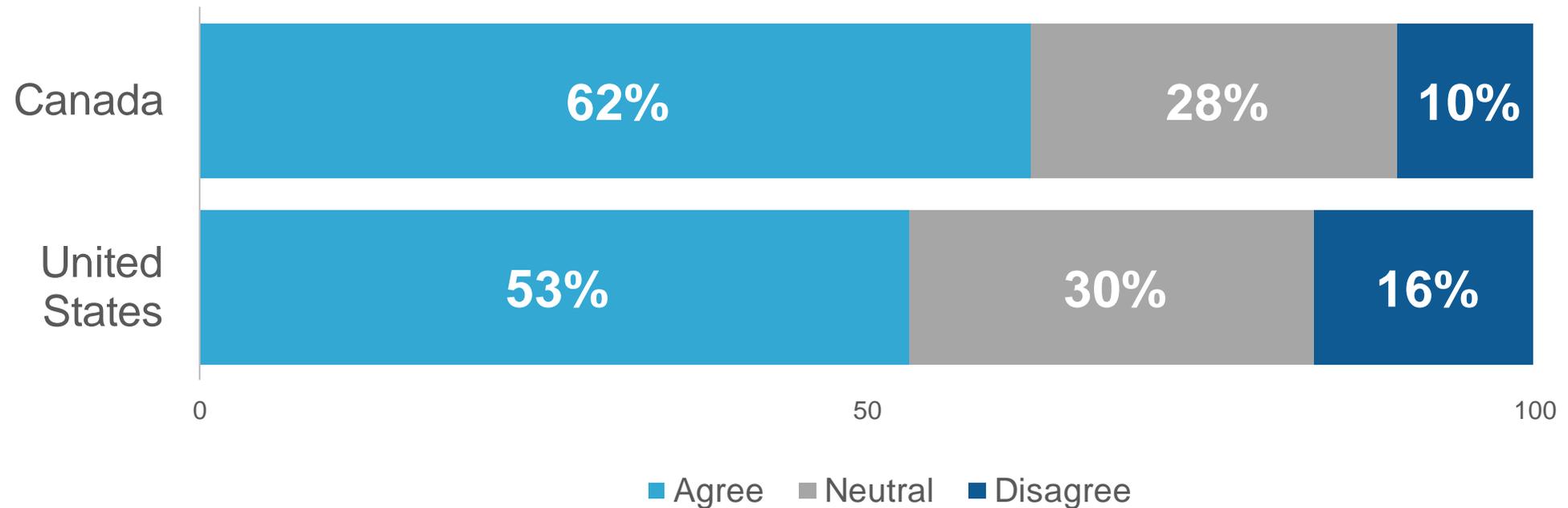
Tourism is important to my local economy



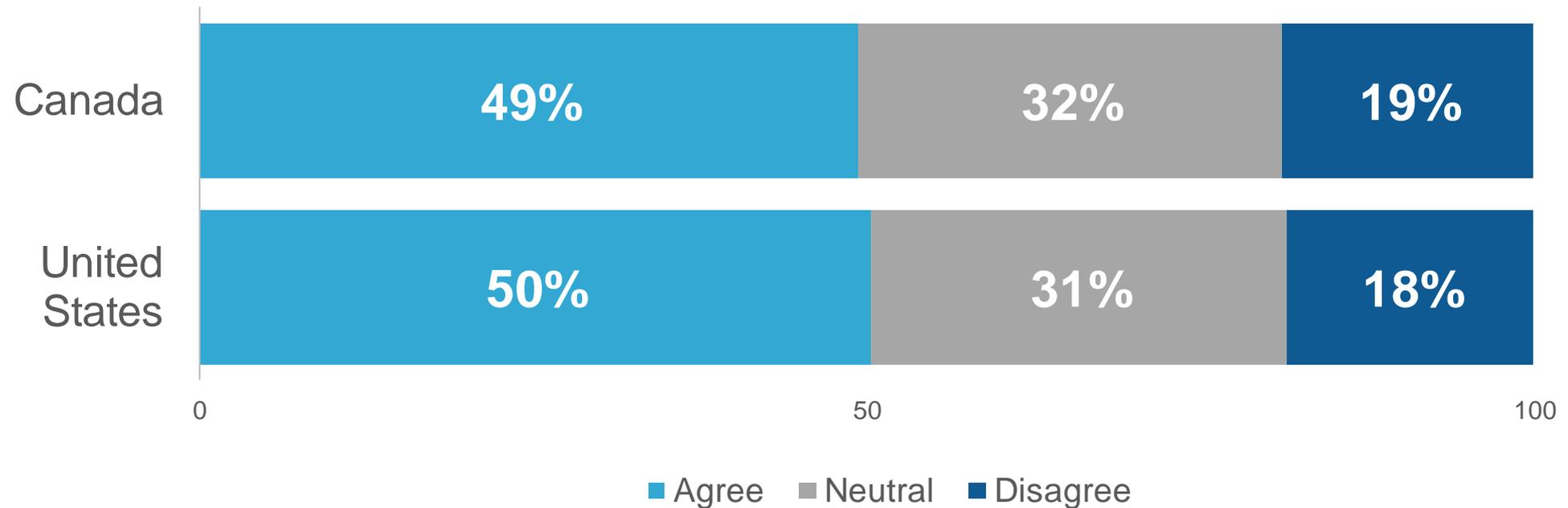
Tourism is important to my local economy



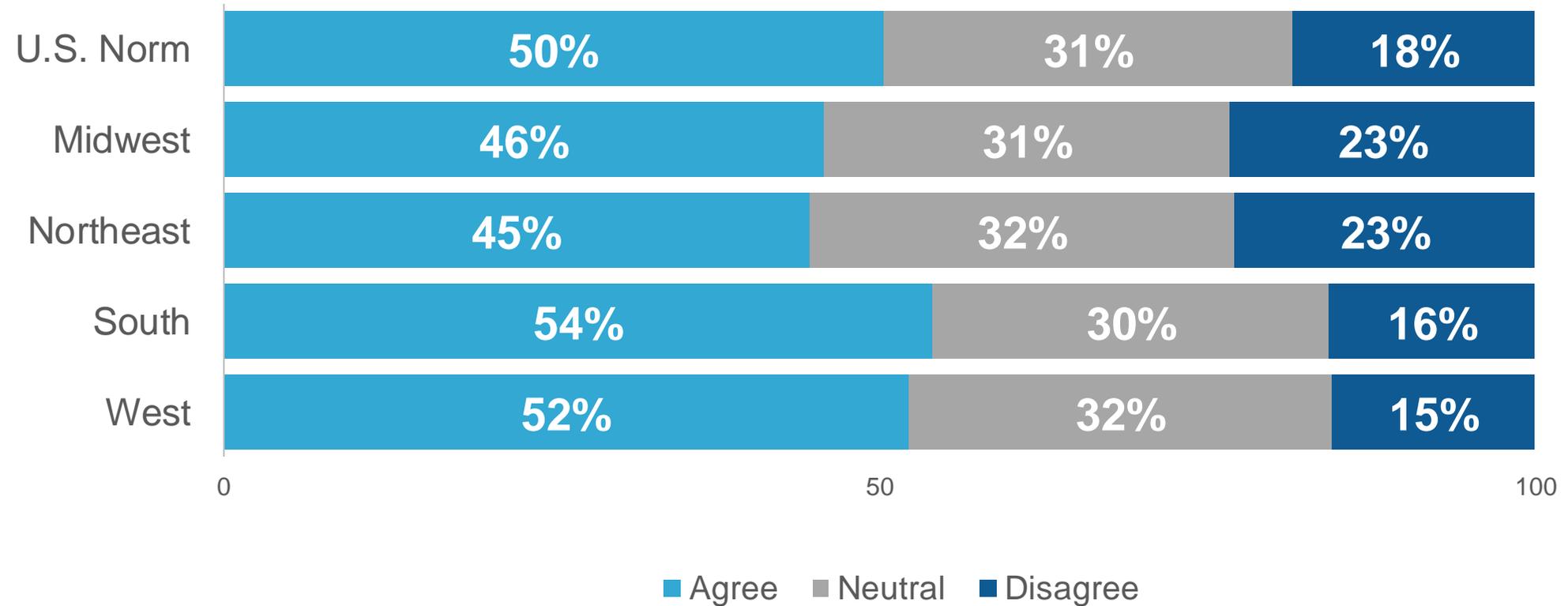
Tourism encourages investment in our local economy



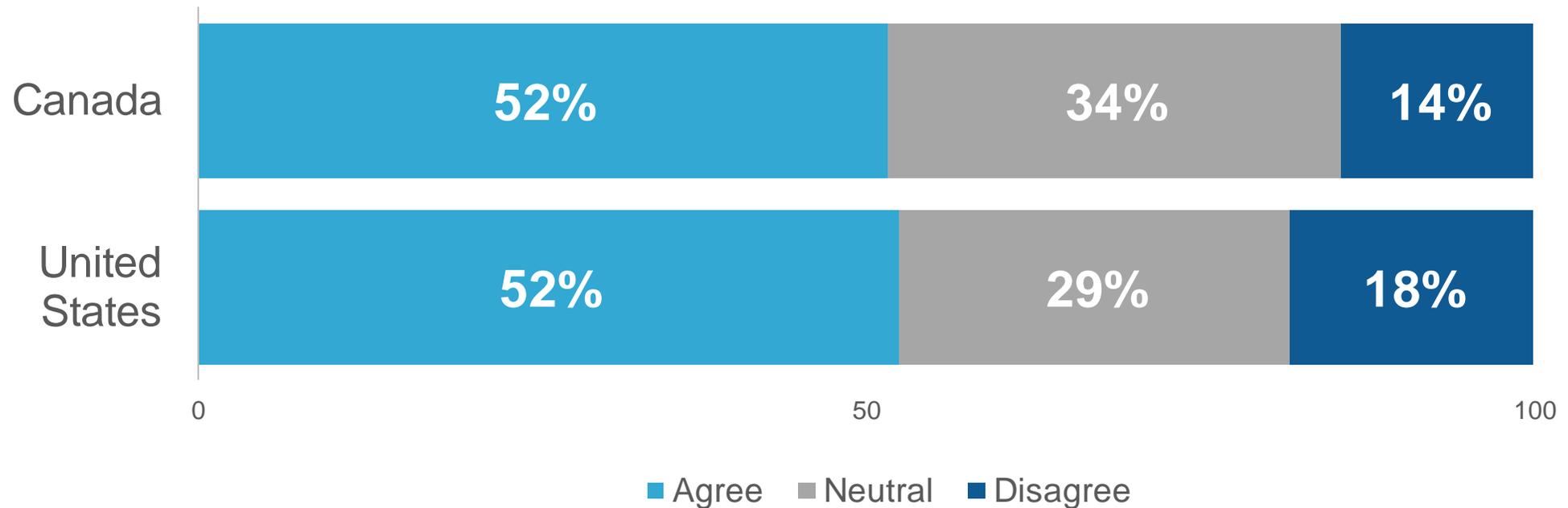
Tourism attracts new residents to our local area



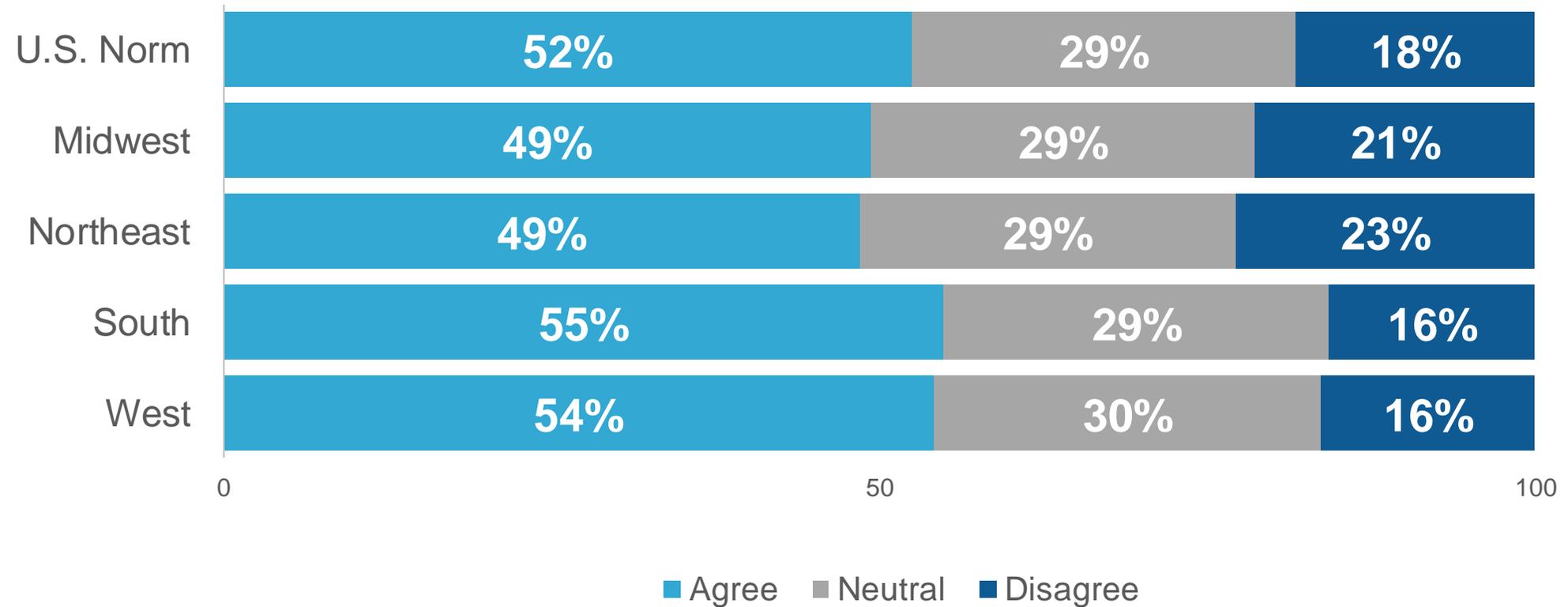
Tourism attracts new residents to our local area



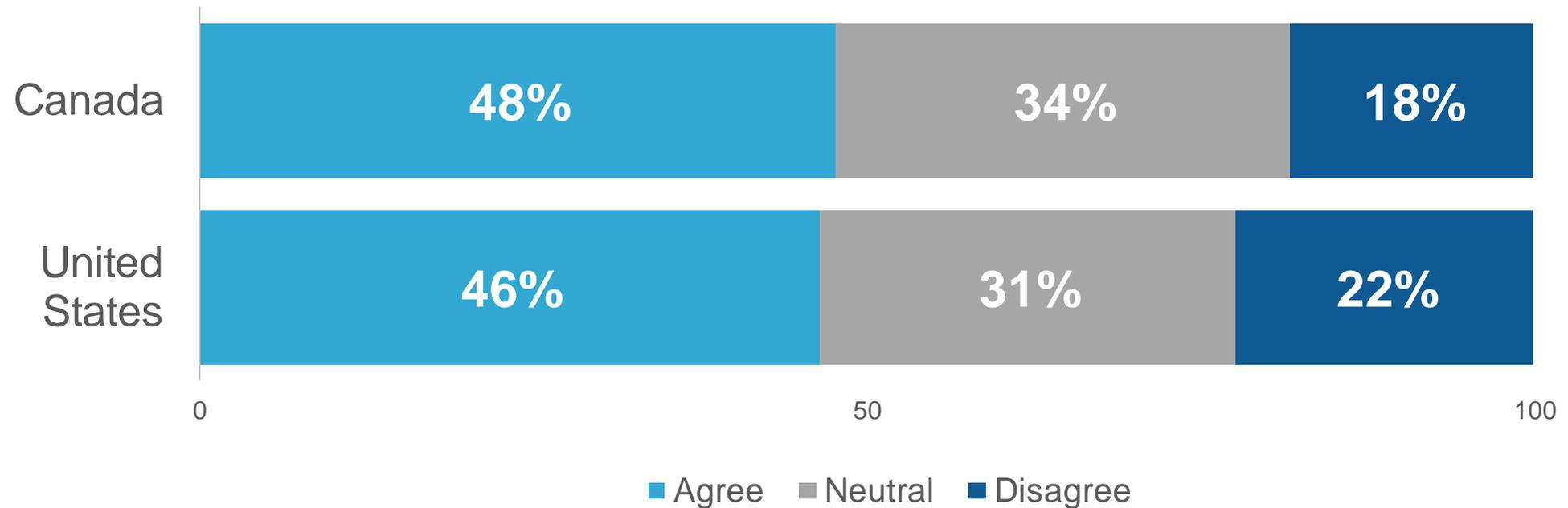
Tourism attracts new businesses to our local area



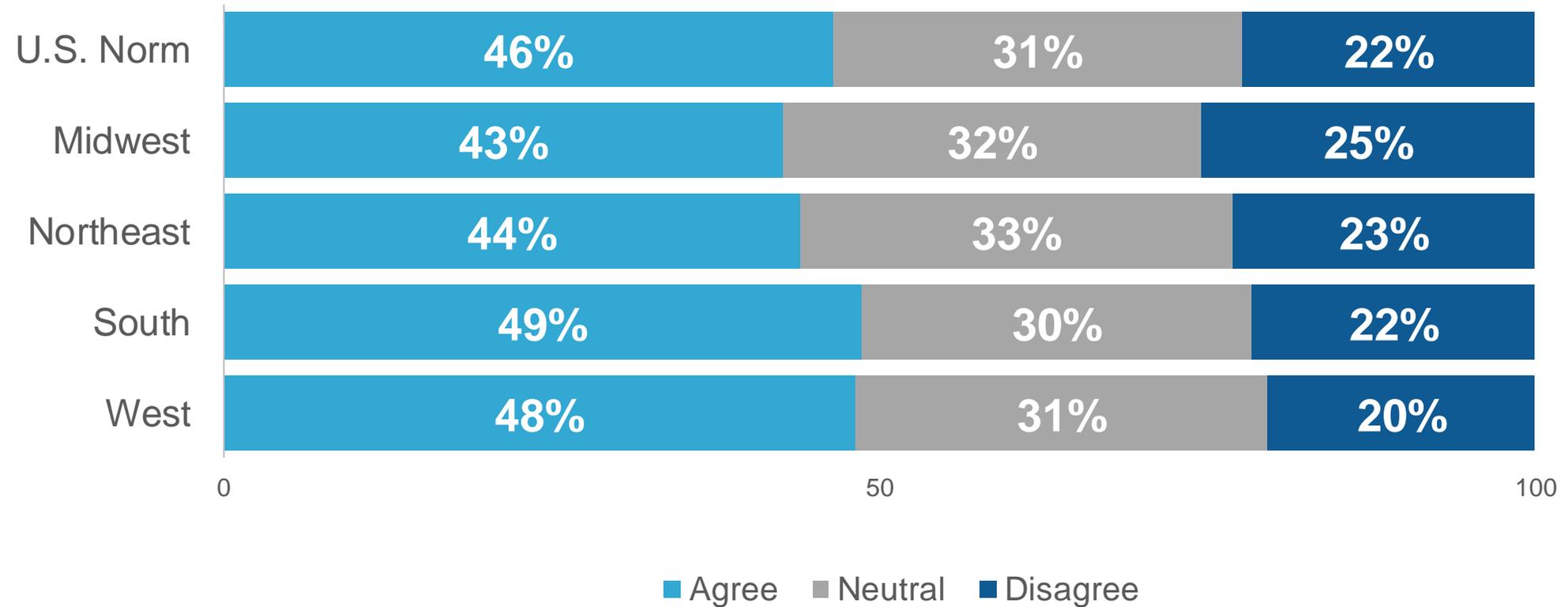
Tourism attracts new businesses to our local area



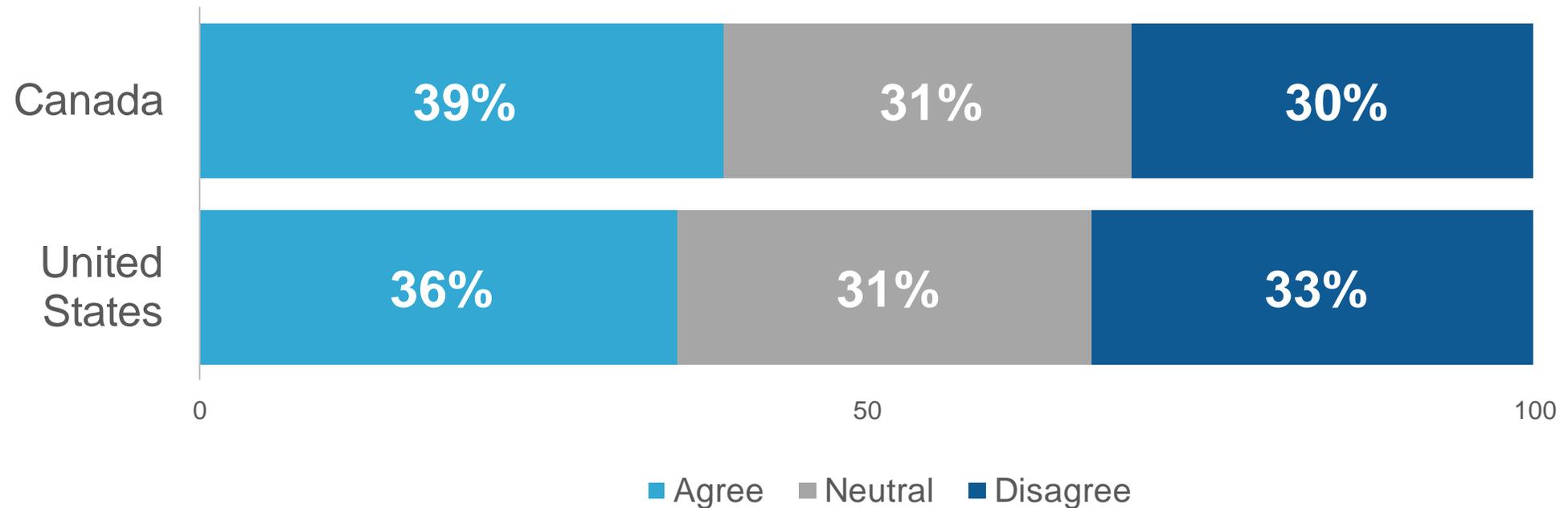
Tourism helps to recruit workforce to our local area



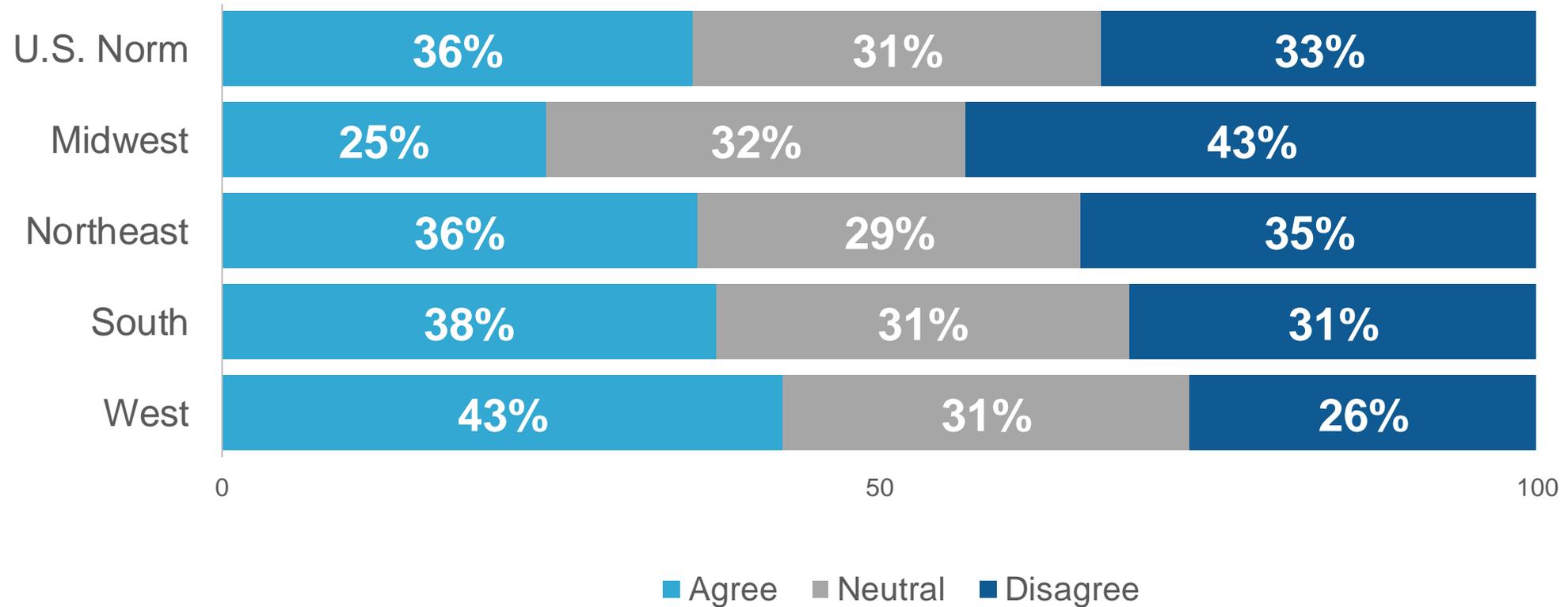
Tourism helps to recruit workforce to our local area



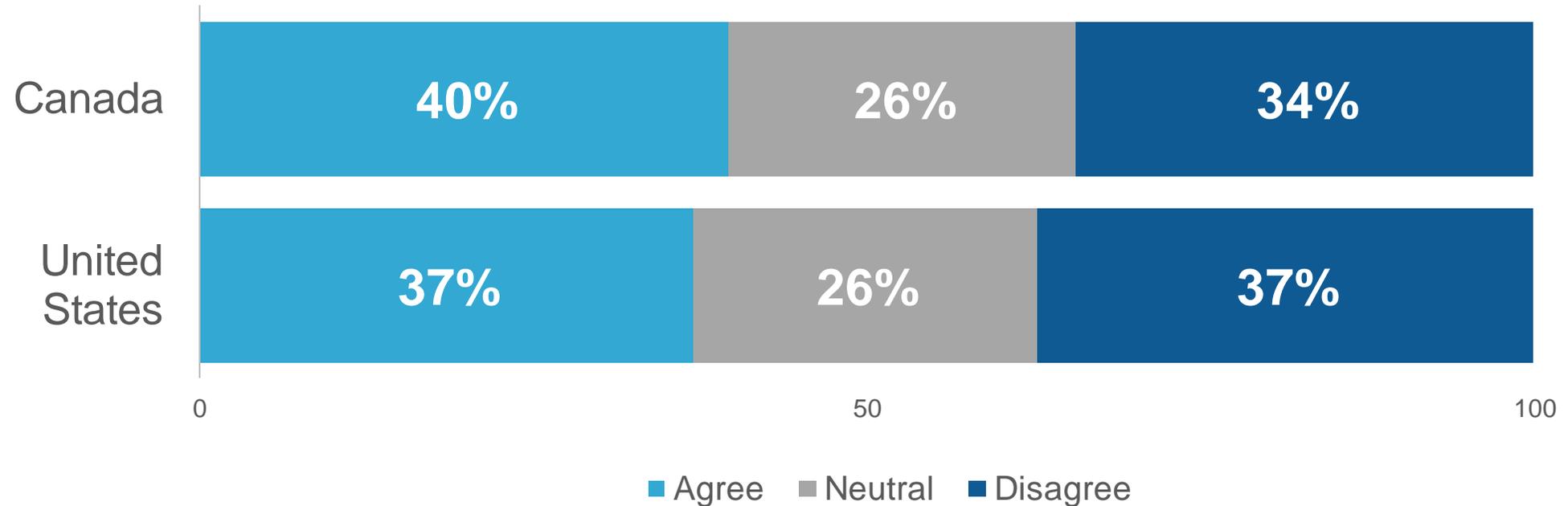
The growth in tourism is causing prices to rise, making things less affordable for residents



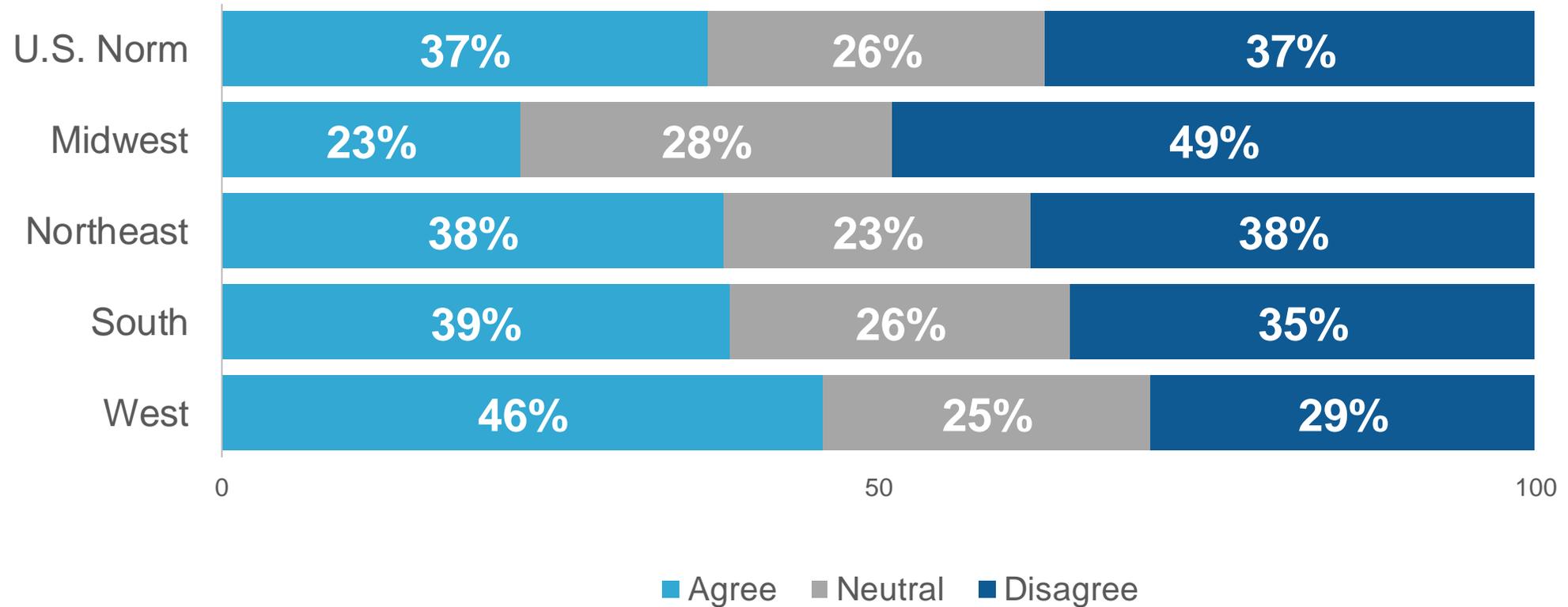
The growth in tourism is causing prices to rise, making things less affordable for residents



Housing is becoming less affordable in this area due to tourism



Housing is becoming less affordable in this area due to tourism



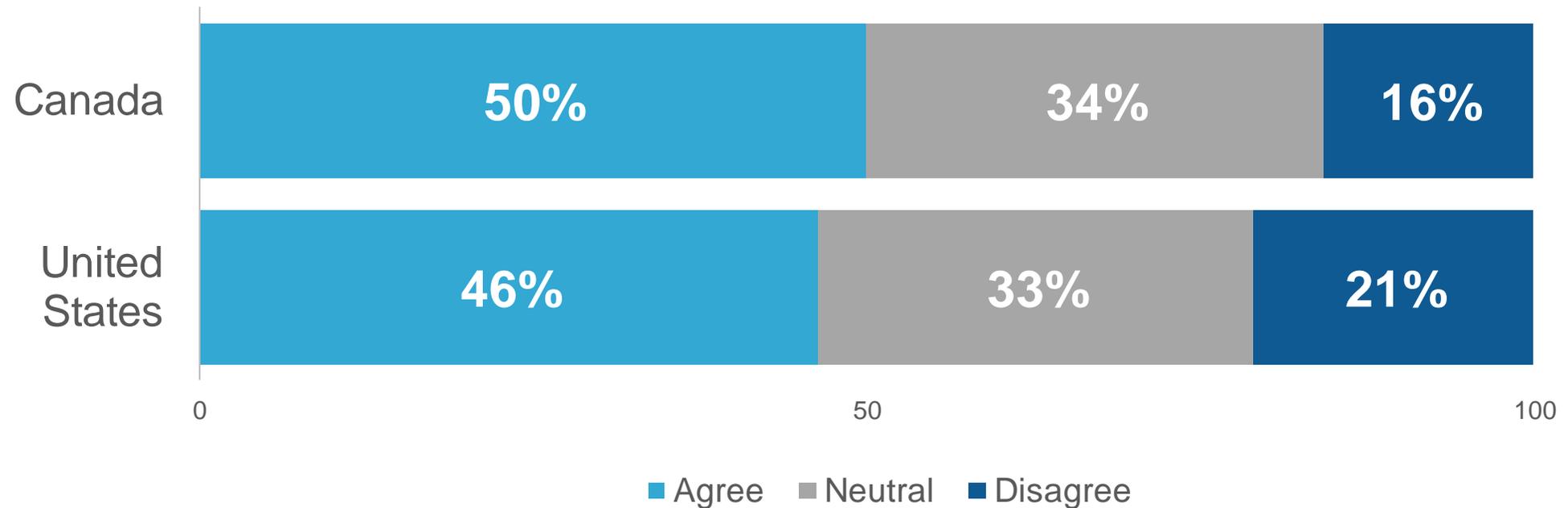


Longwoods
INTERNATIONAL

Tourism Employment

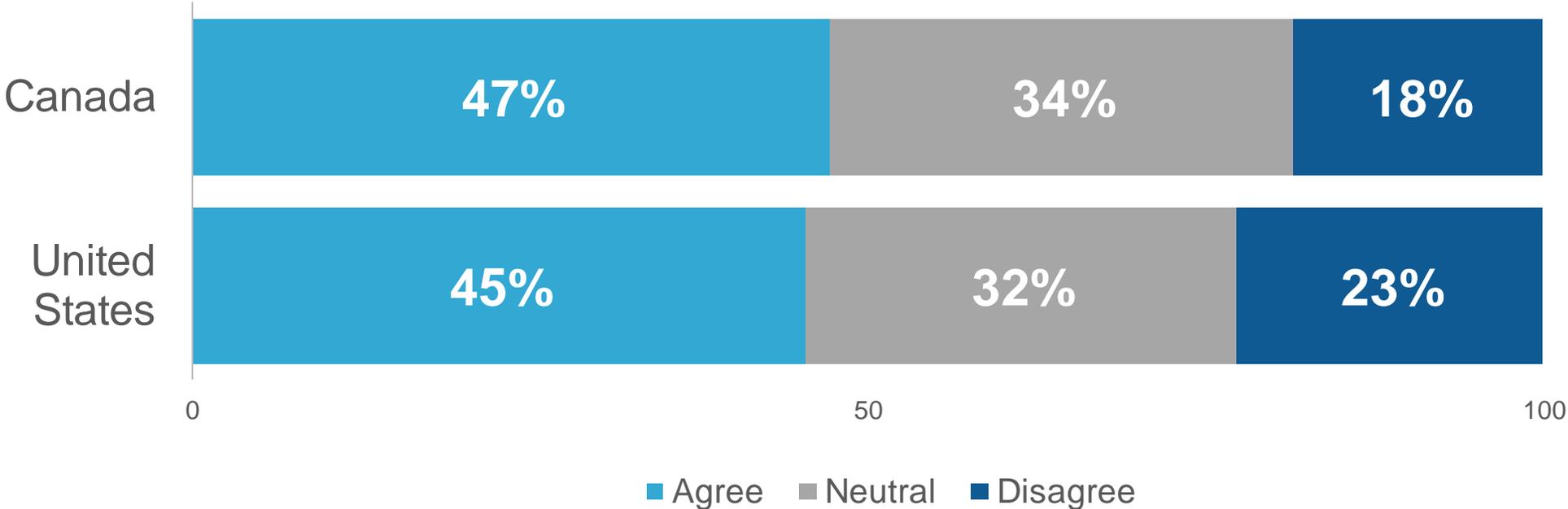
Tourism Employment

There are opportunities for career advancement in the tourism industry



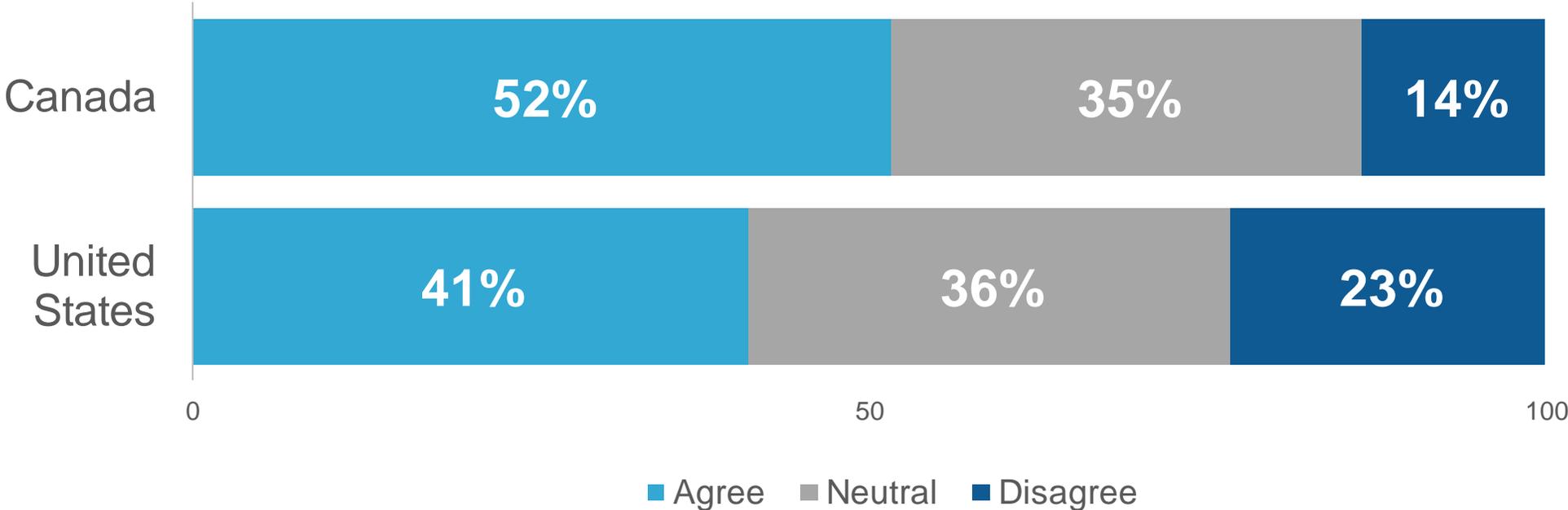
Tourism Employment

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



Tourism Employment

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



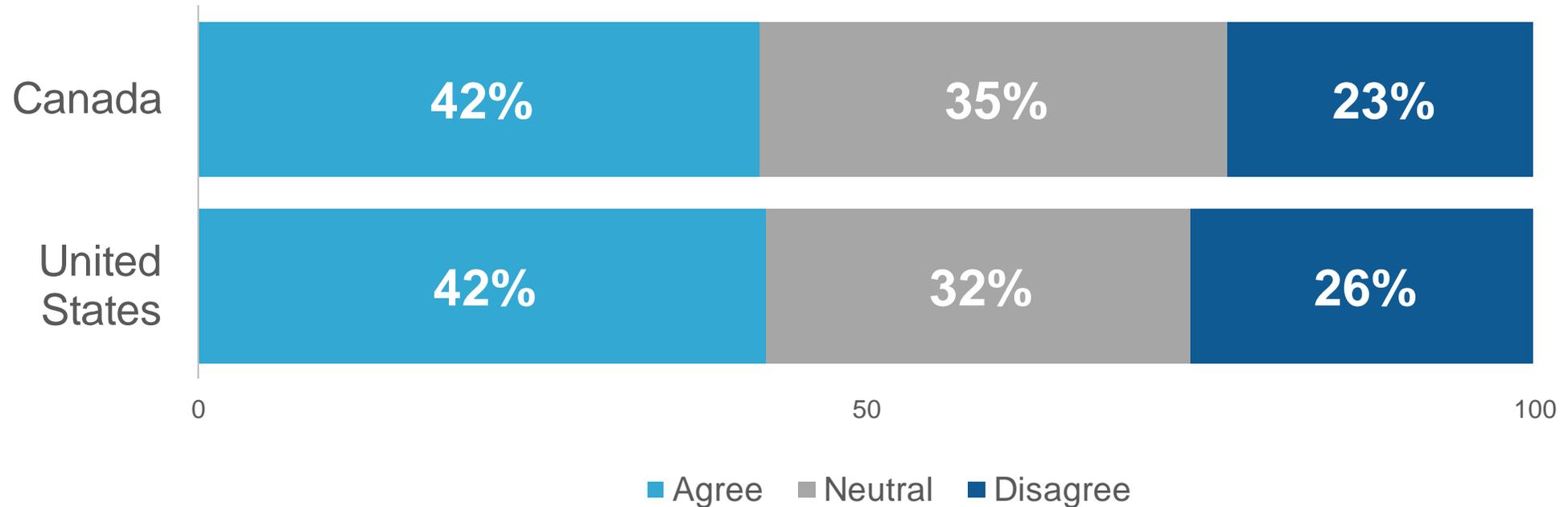


Longwoods
INTERNATIONAL

Quality of Life

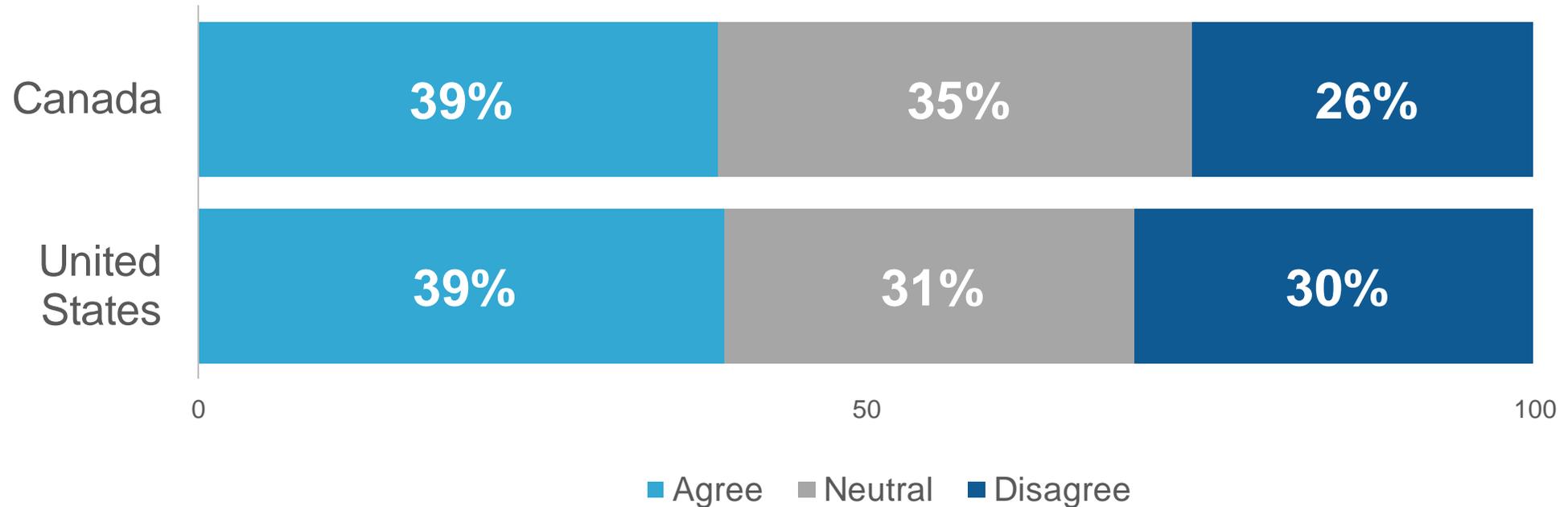
Quality of Life

Quality of life in my province/state has improved because of increased tourism



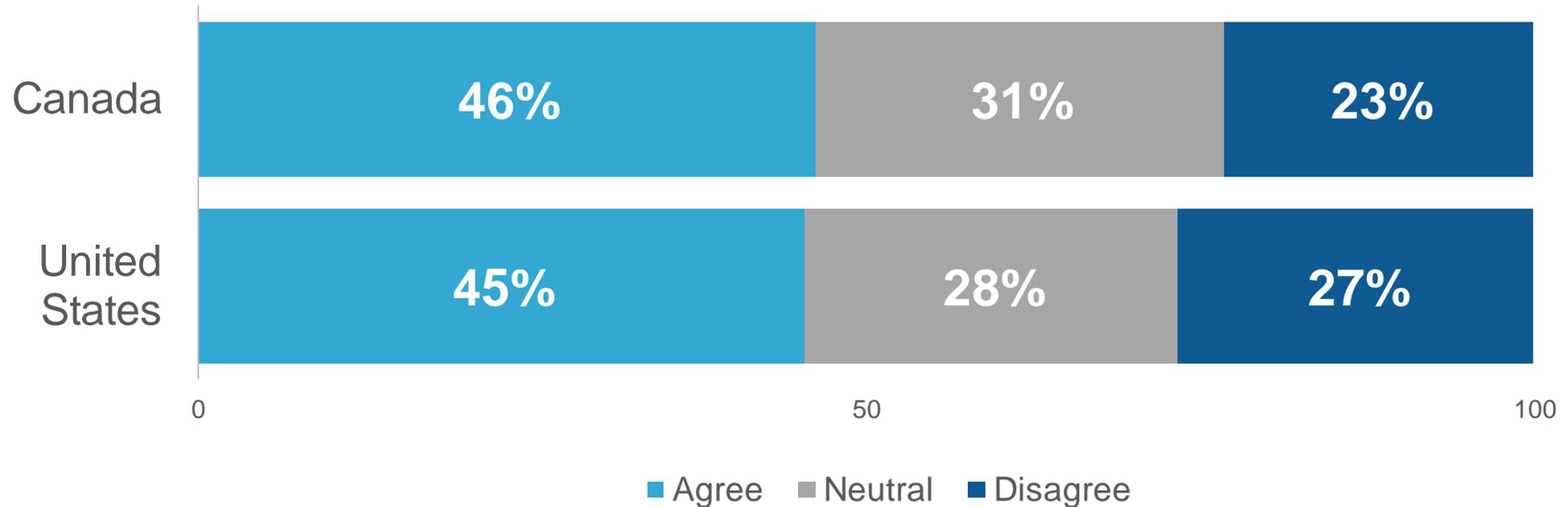
Quality of Life

Quality of life in my local area has improved because of increased tourism

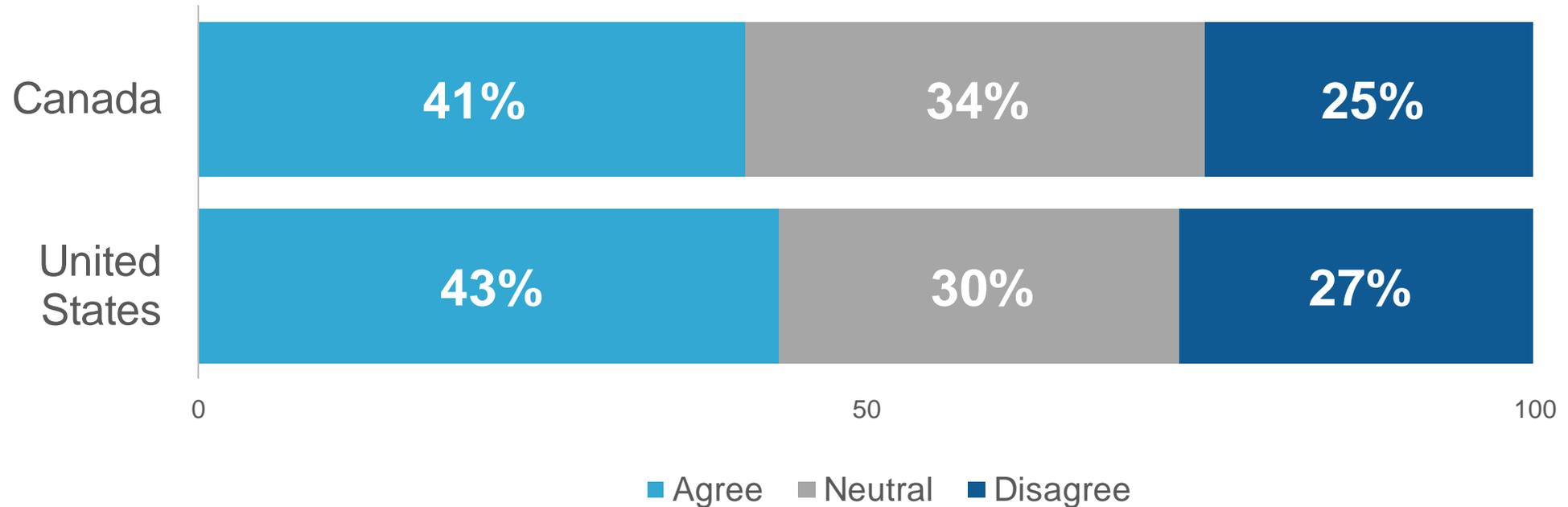


Quality of Life

I have more recreational opportunities (places to go and things to do) because of tourism in this area

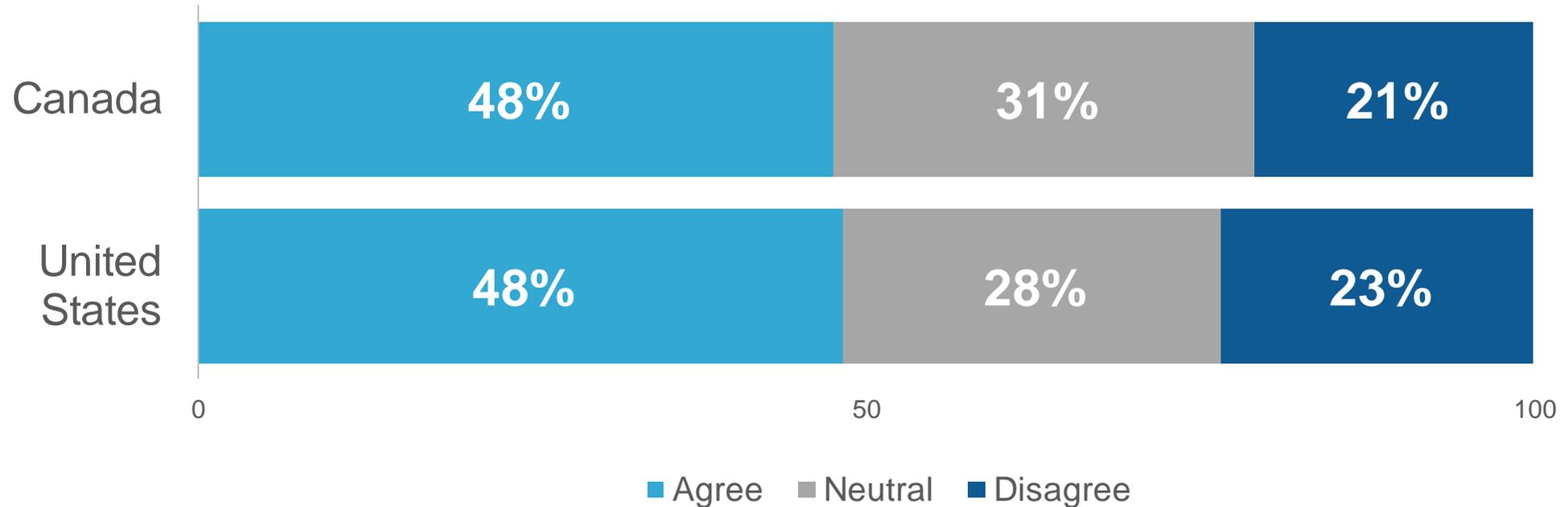


Shopping opportunities are better here as a result of tourism



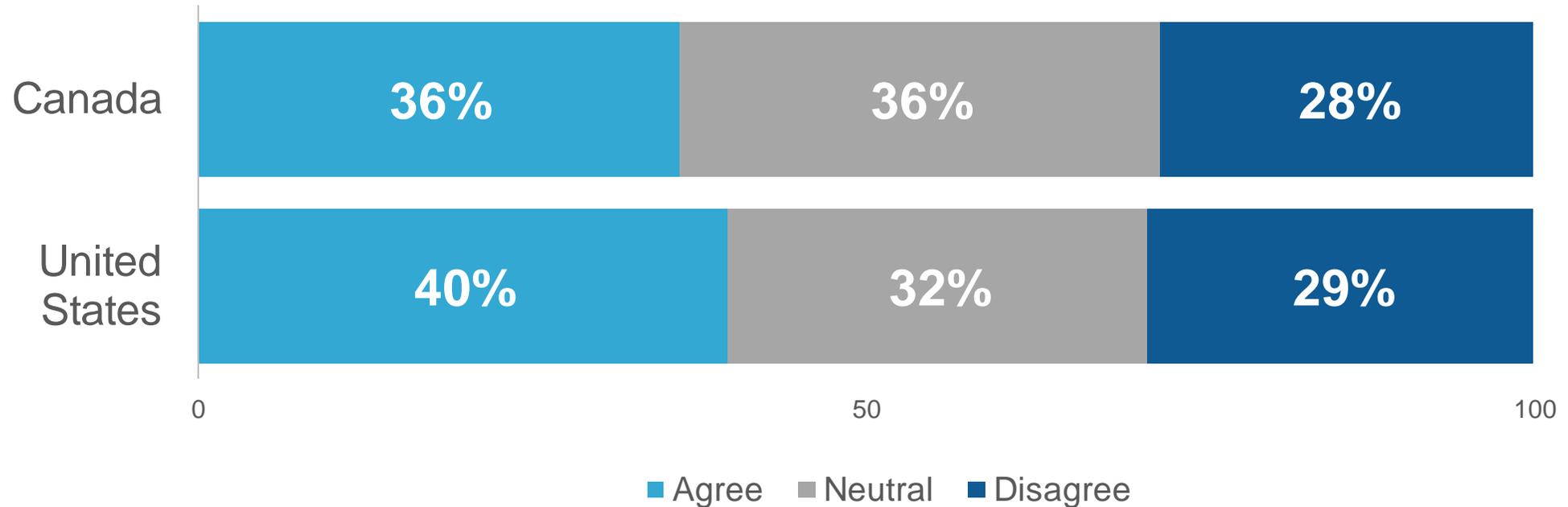
Quality of Life – New in 2023

Dining opportunities are better here as a result of tourism



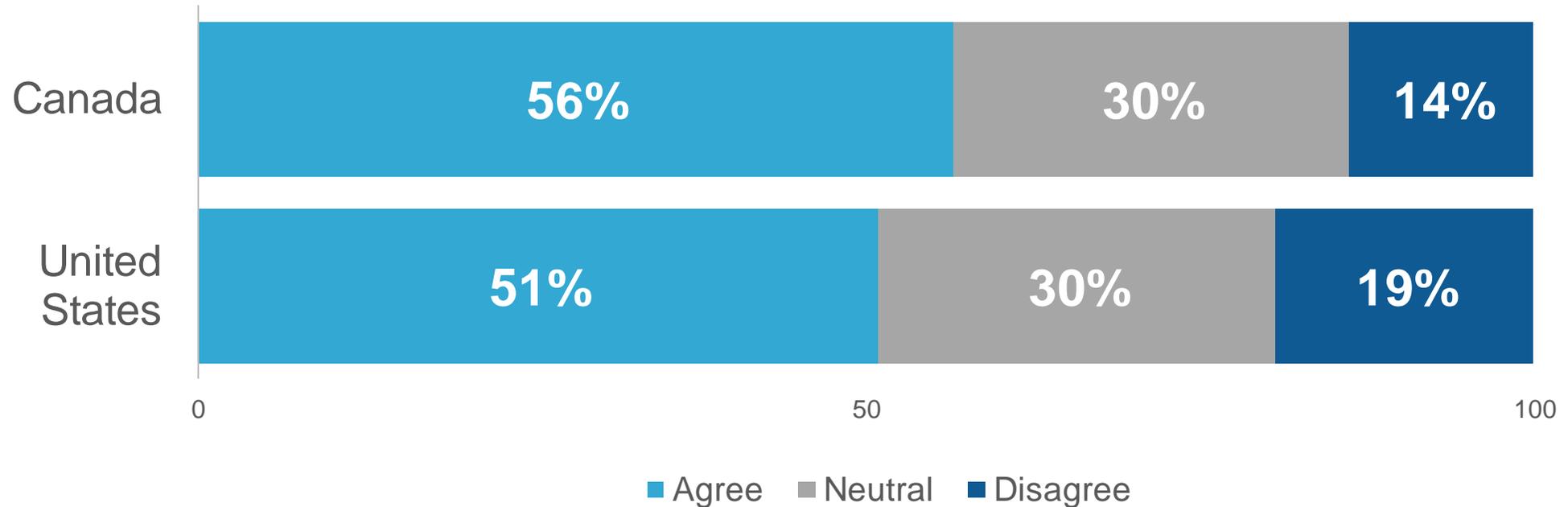
Quality of Life

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

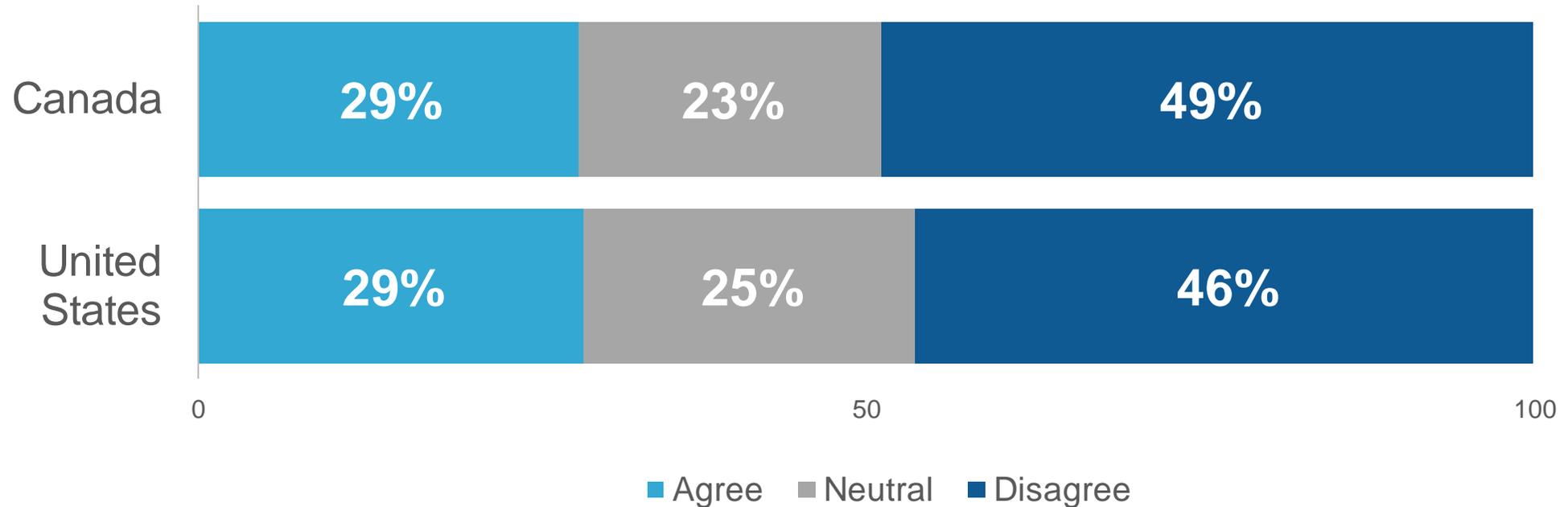


Quality of Life

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

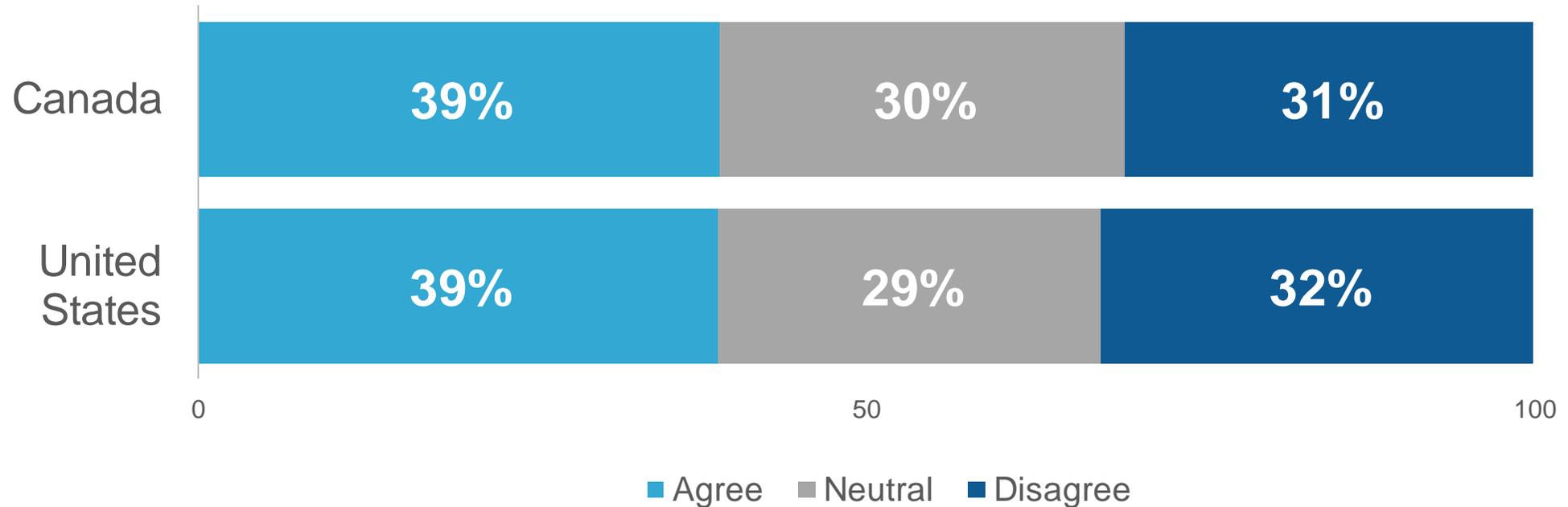


Uncontrolled tourism growth is jeopardizing our heritage and culture



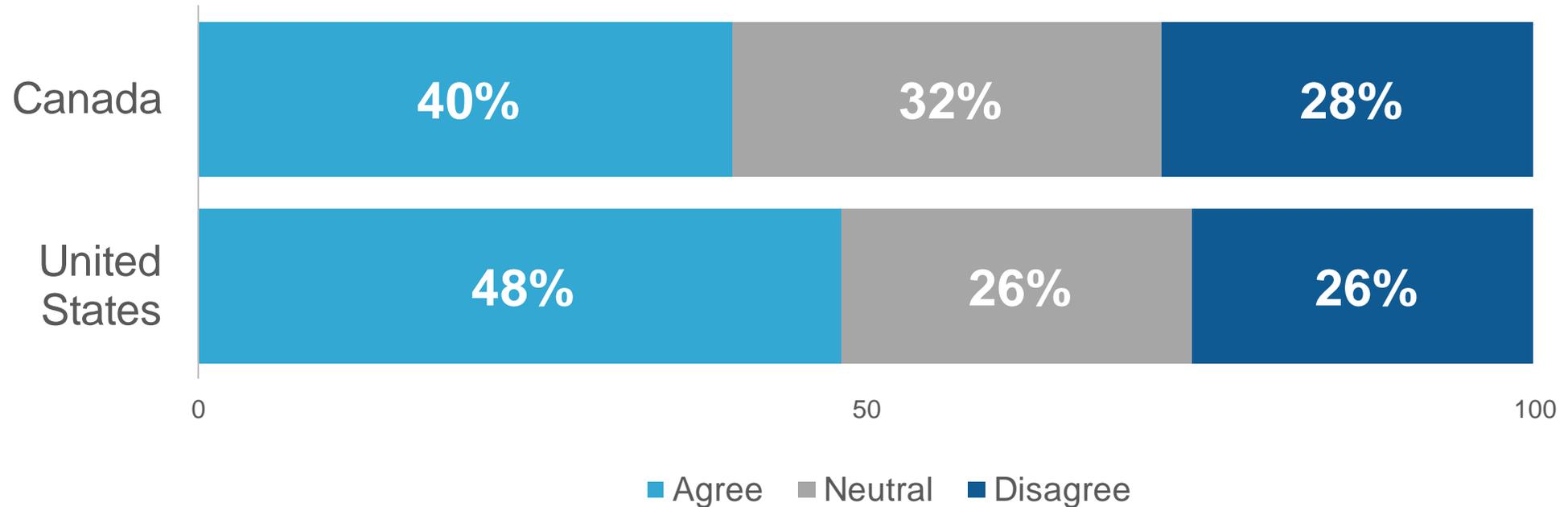
Quality of Life

Attractions and leisure facilities are becoming overcrowded because of more tourists



Quality of Life

Tourists add to traffic congestion and parking problems here

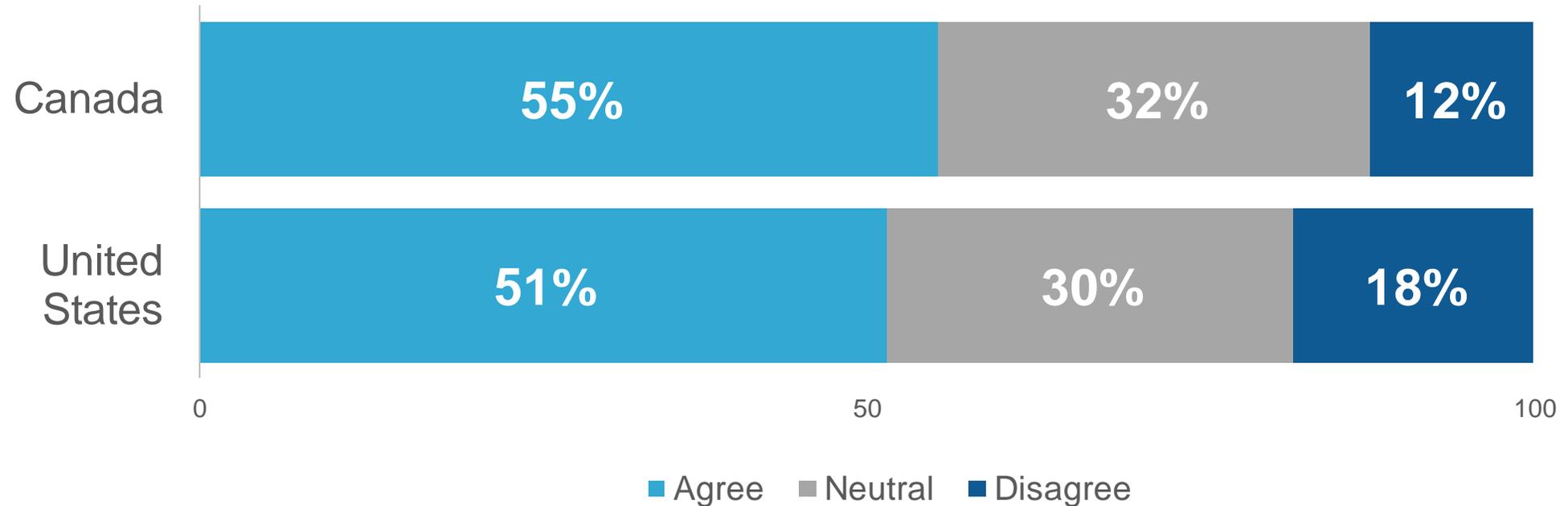




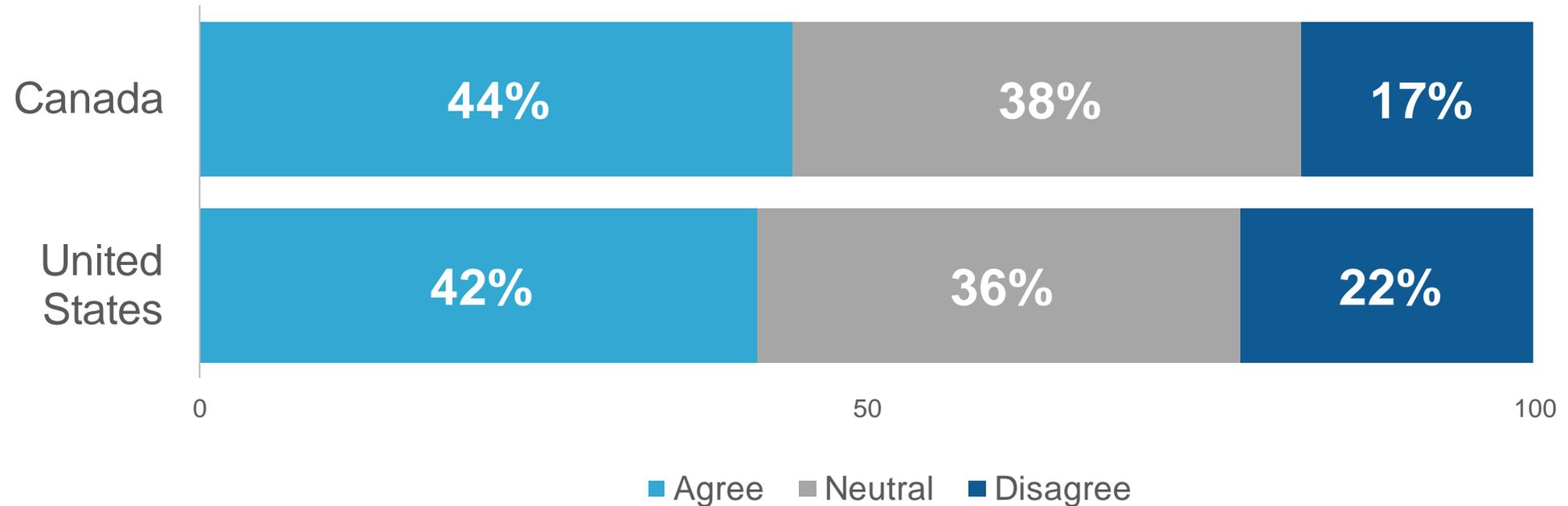
Longwoods
INTERNATIONAL

Environment

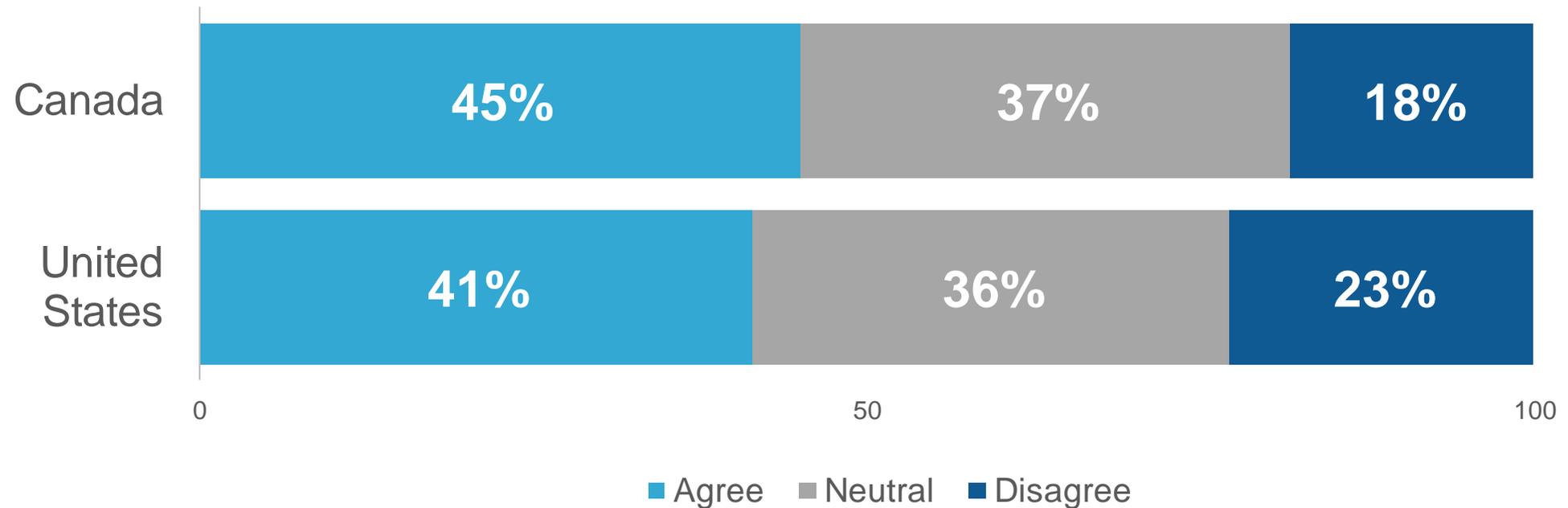
Long-term planning can limit environmental impacts caused by tourism



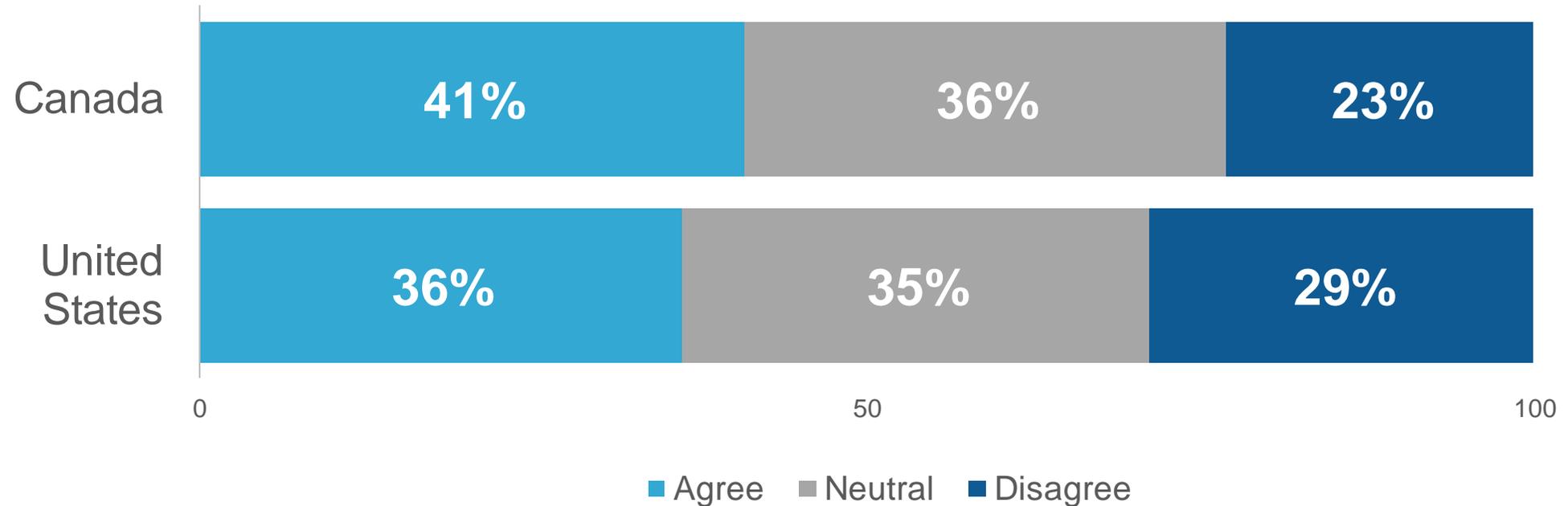
Tourism is a good alternative to more environmentally-damaging development



Tourism can help the environment as local governments and people seek to protect sensitive and scenic areas



The tourism industry values sustainability and our natural resources

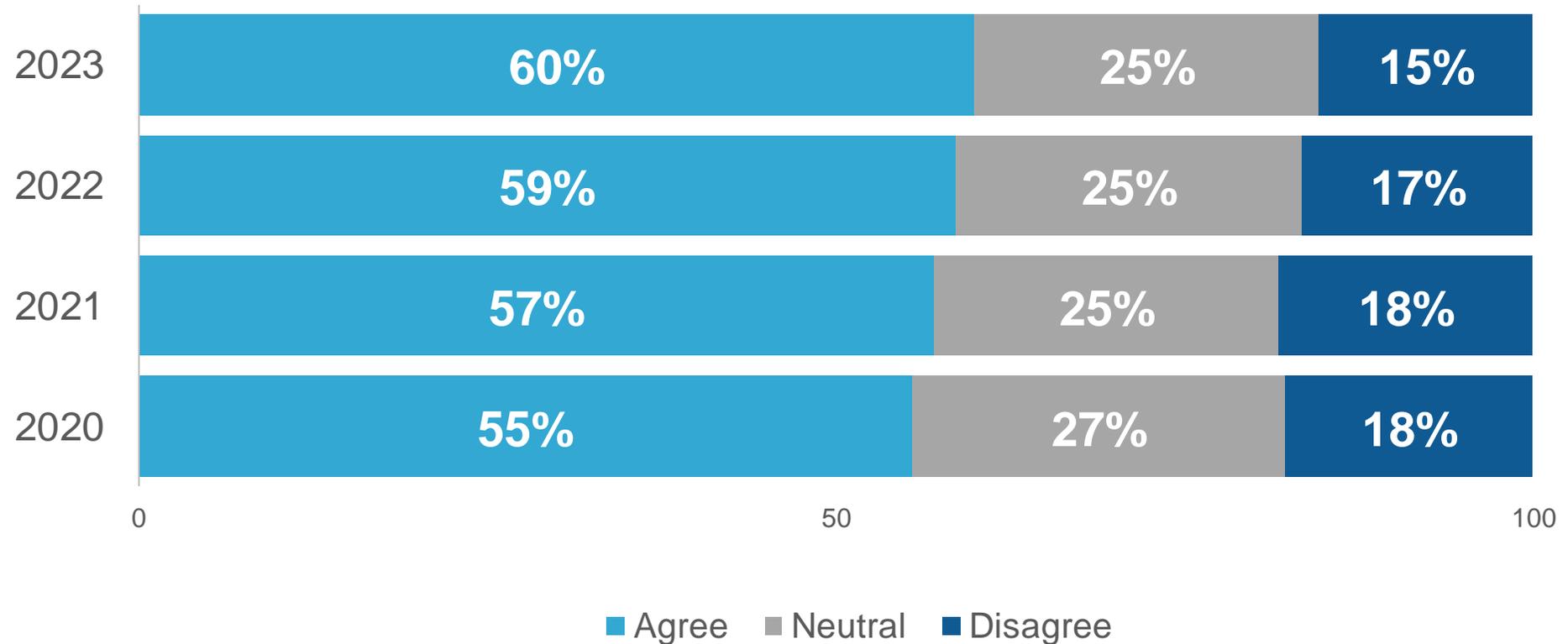




What's going well?

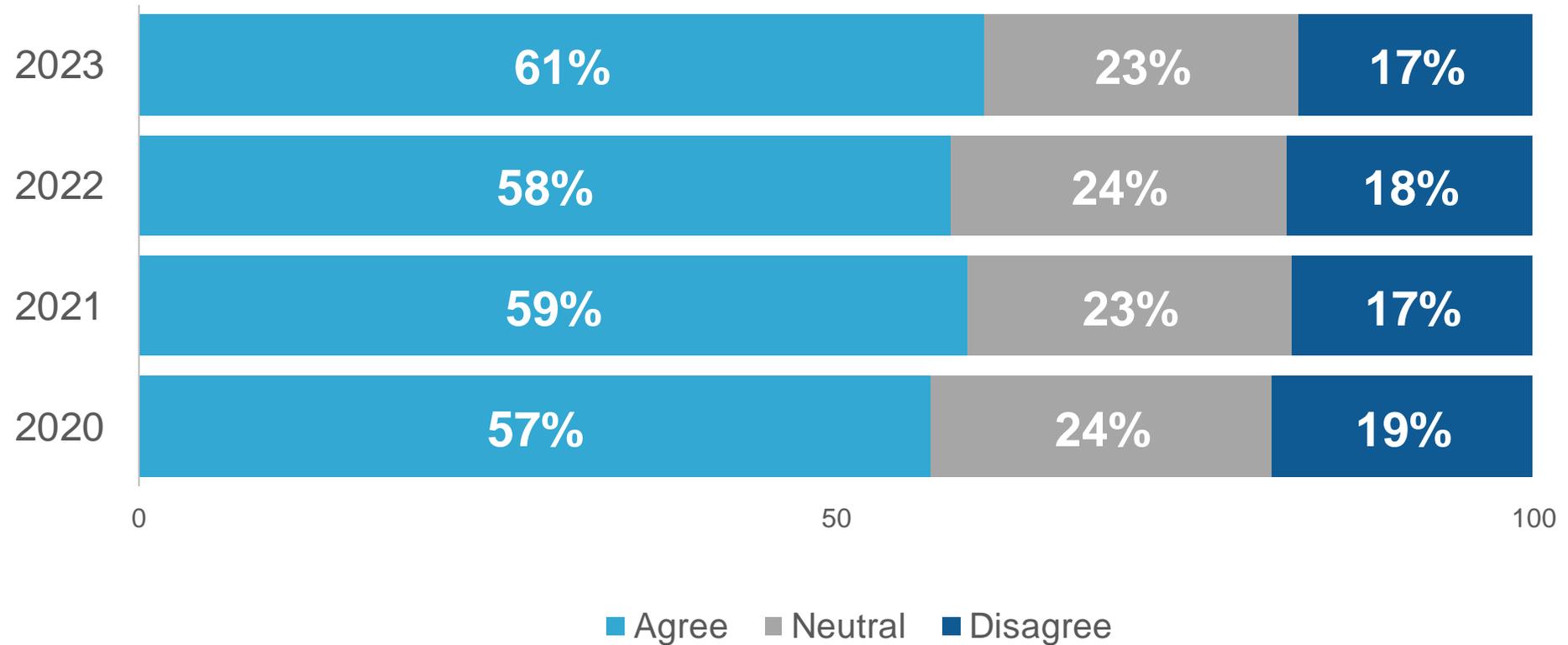
Overall Sentiment About Tourism – U.S.

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



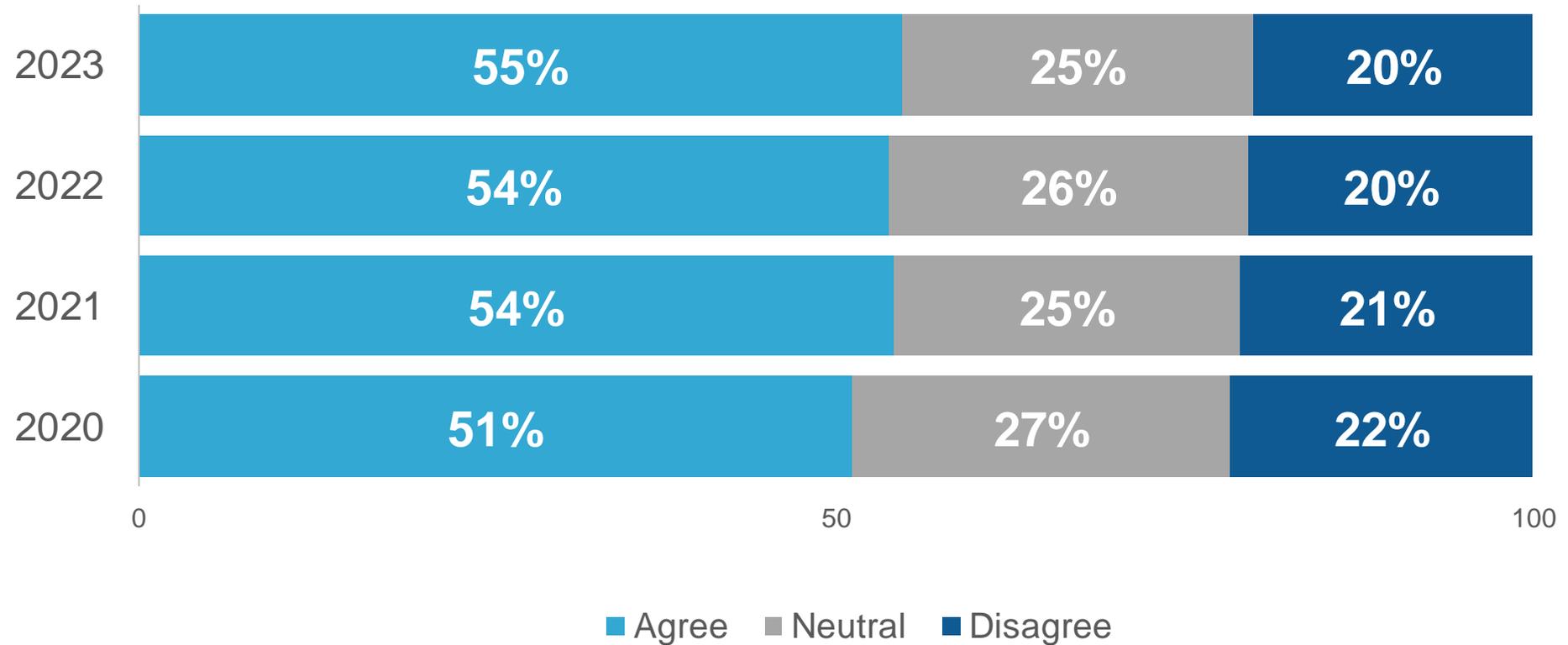
Overall Sentiment About Tourism – U.S.

Overall, I think tourism is good for my local area



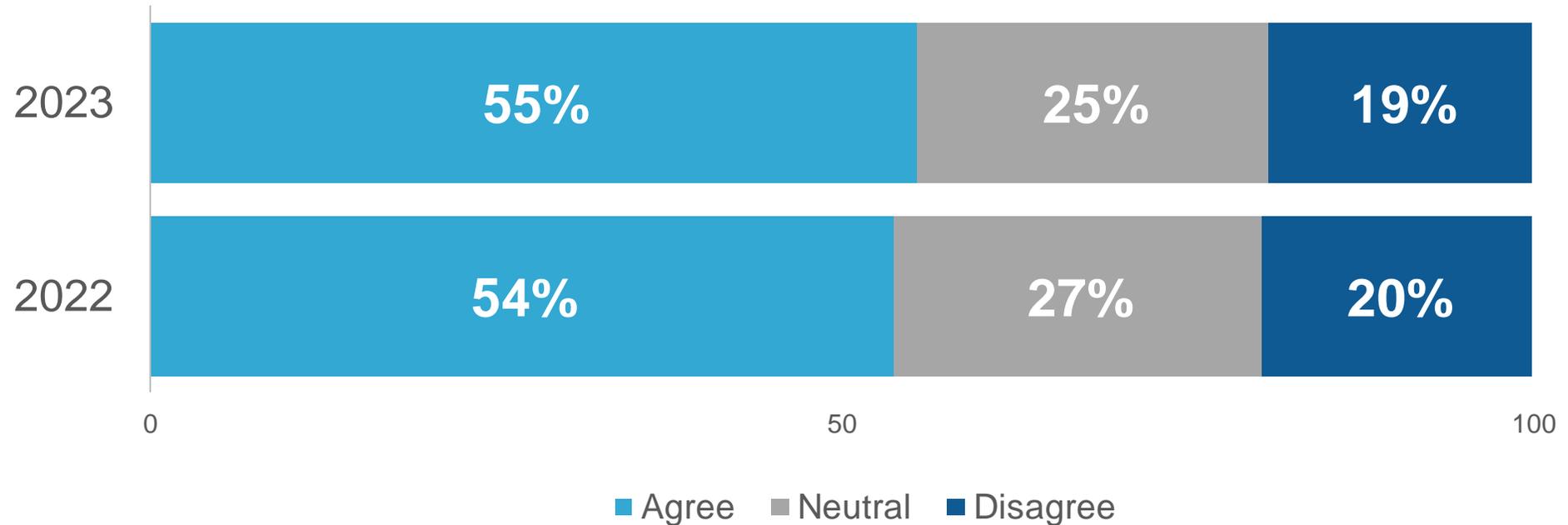
Overall Sentiment About Tourism – U.S.

I want tourism to be important in my local area



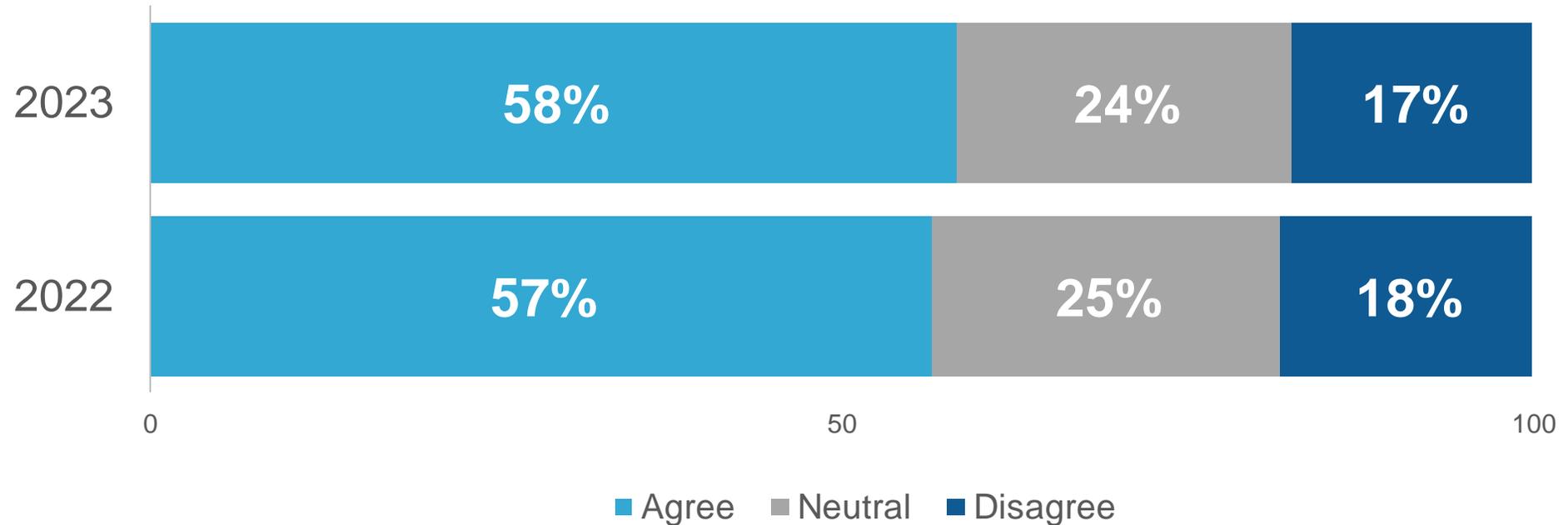
Overall Sentiment About Tourism – U.S.

I care about the success of the tourism industry in my local area



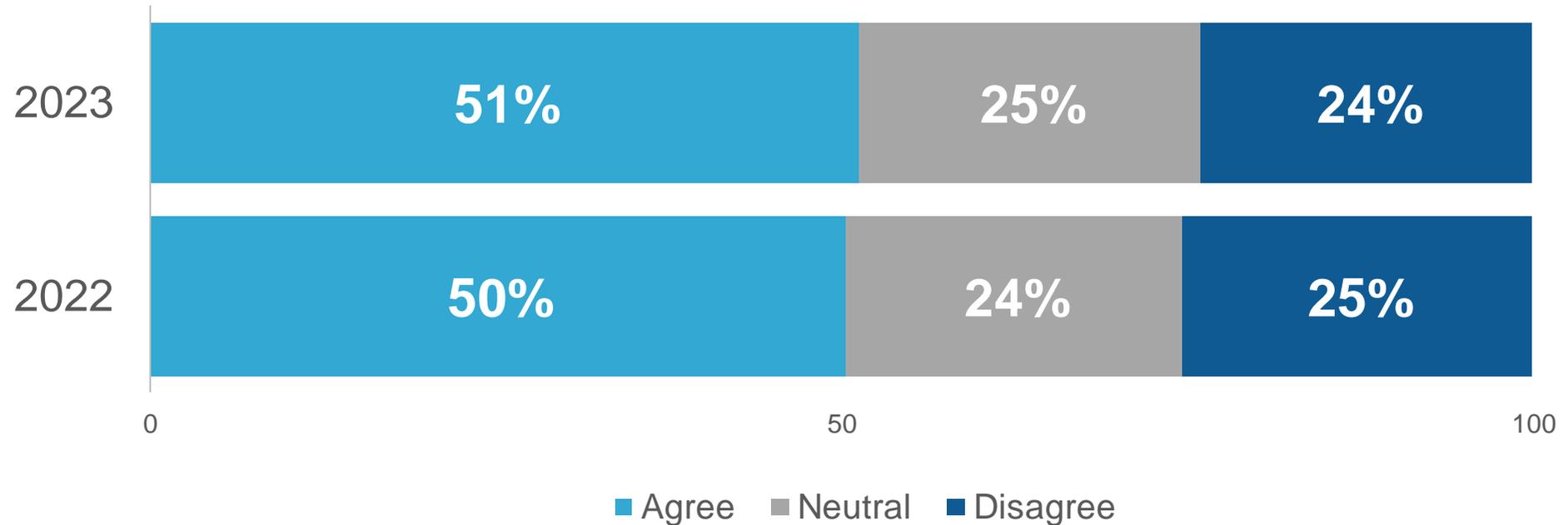
Overall Sentiment About Tourism – U.S.

I want to see tourism thrive in my local area



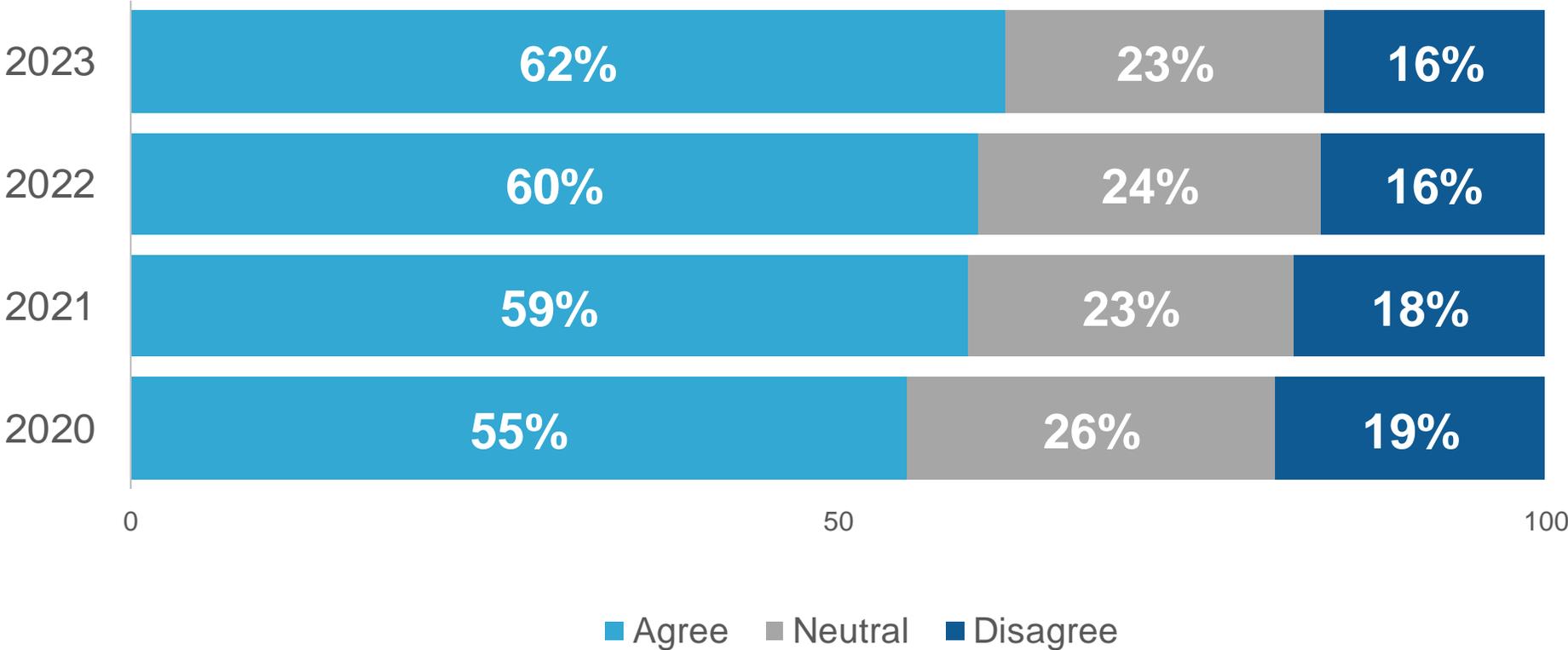
Overall Sentiment About Tourism – U.S.

My local area benefits from a strong tourism industry



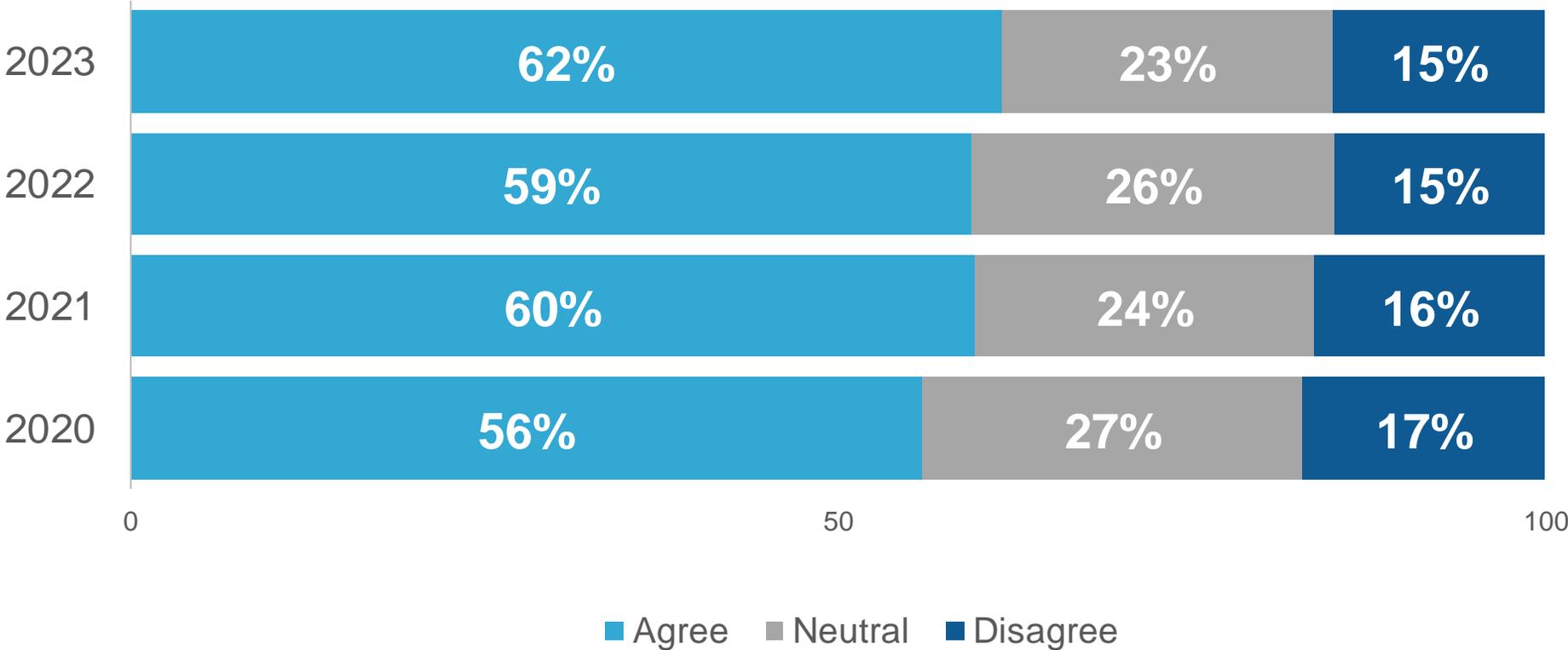
Tourism Development and Growth – U.S.

I believe tourism should be encouraged here



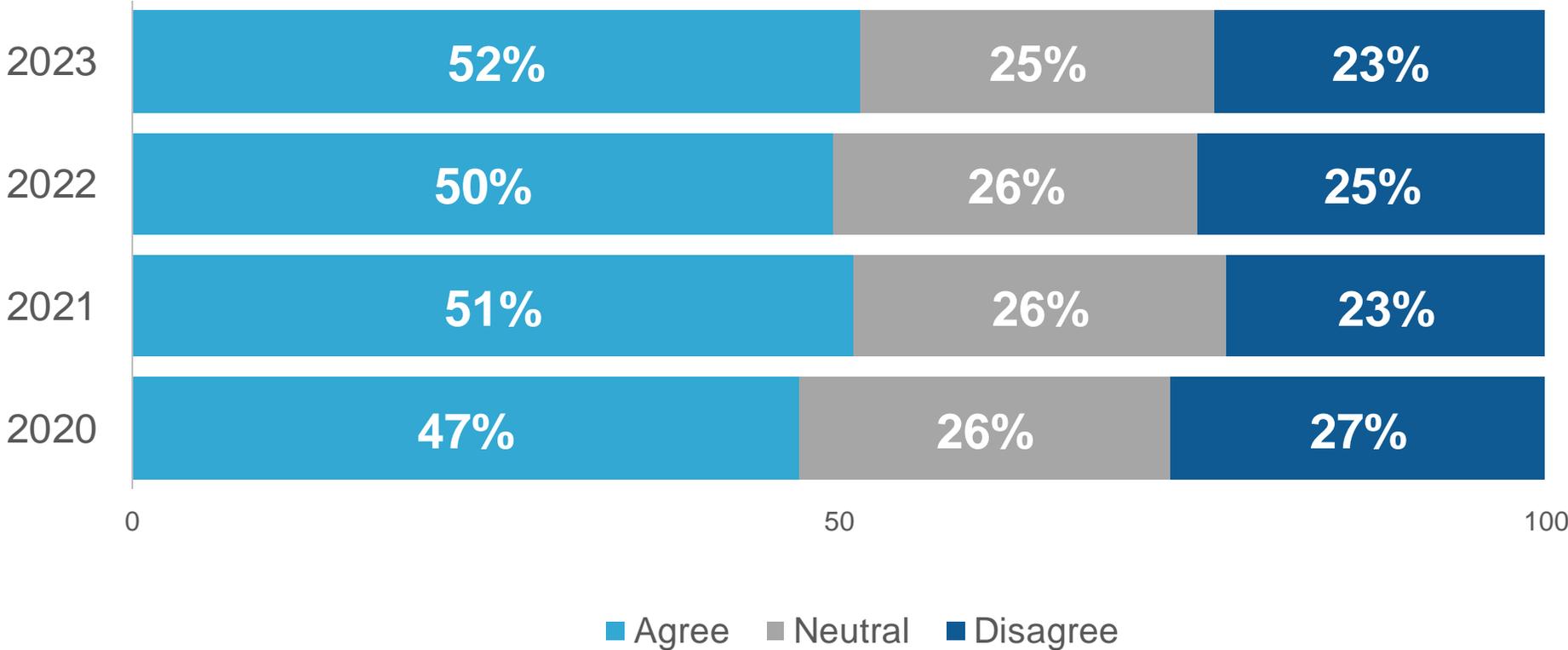
Tourism Development and Growth – U.S.

I support tourism growth



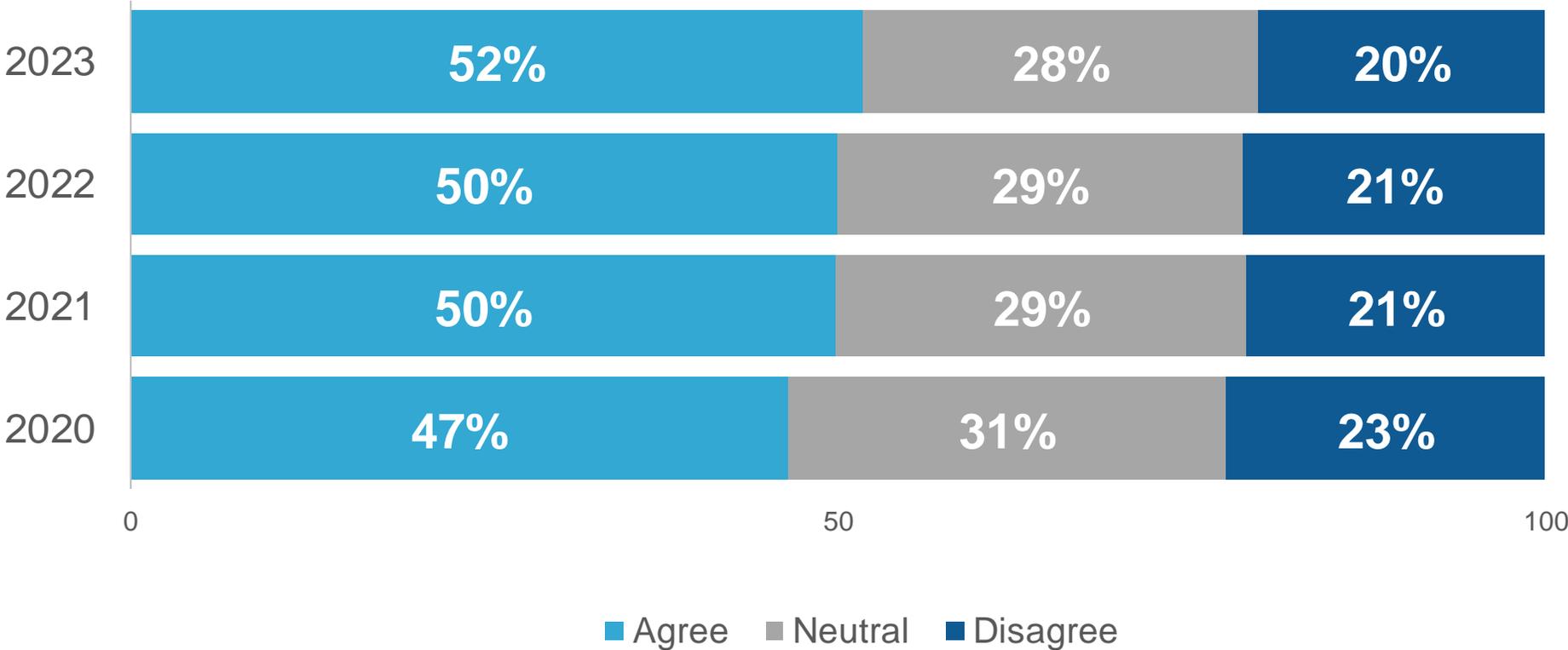
Tourism Development and Growth – U.S.

I would like to see more tourists coming to my area



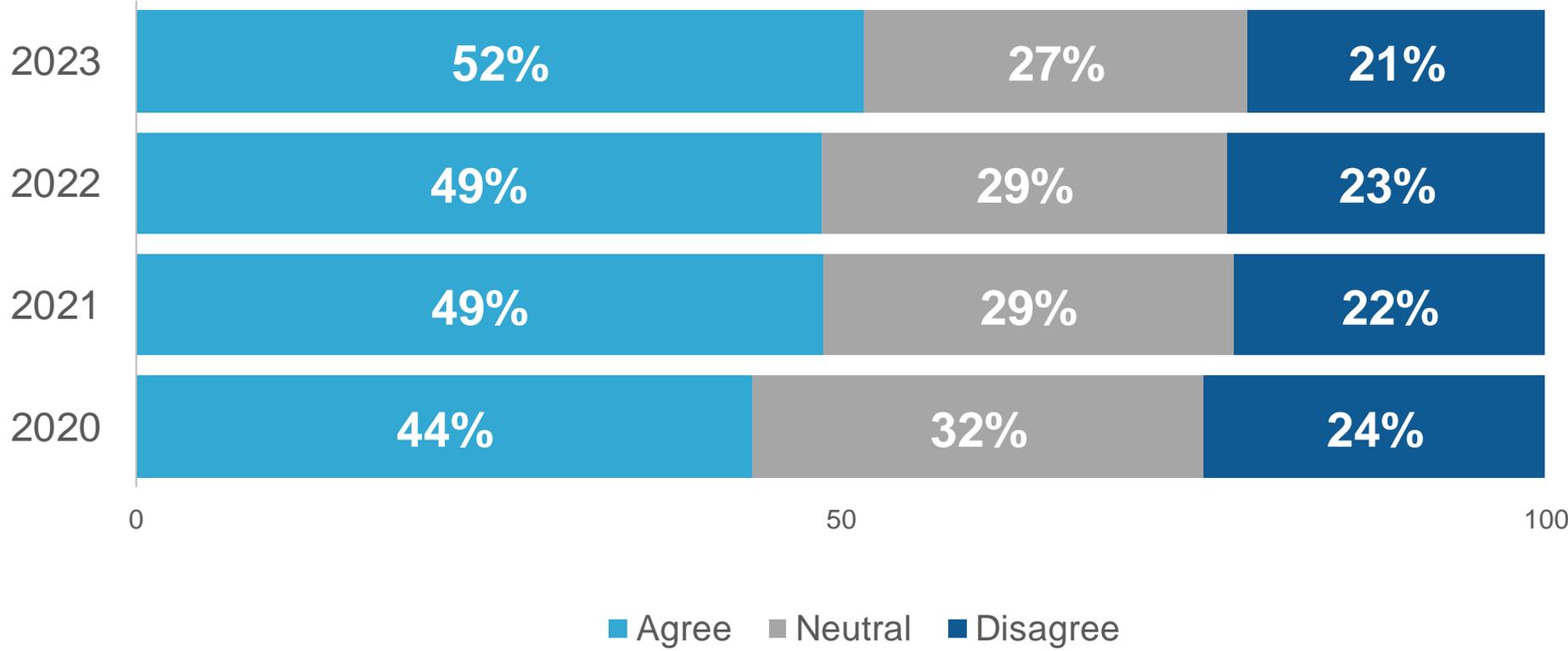
Tourism Development and Growth – U.S.

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



Tourism Development and Growth – U.S.

I support building new tourism facilities that will attract visitors to this area

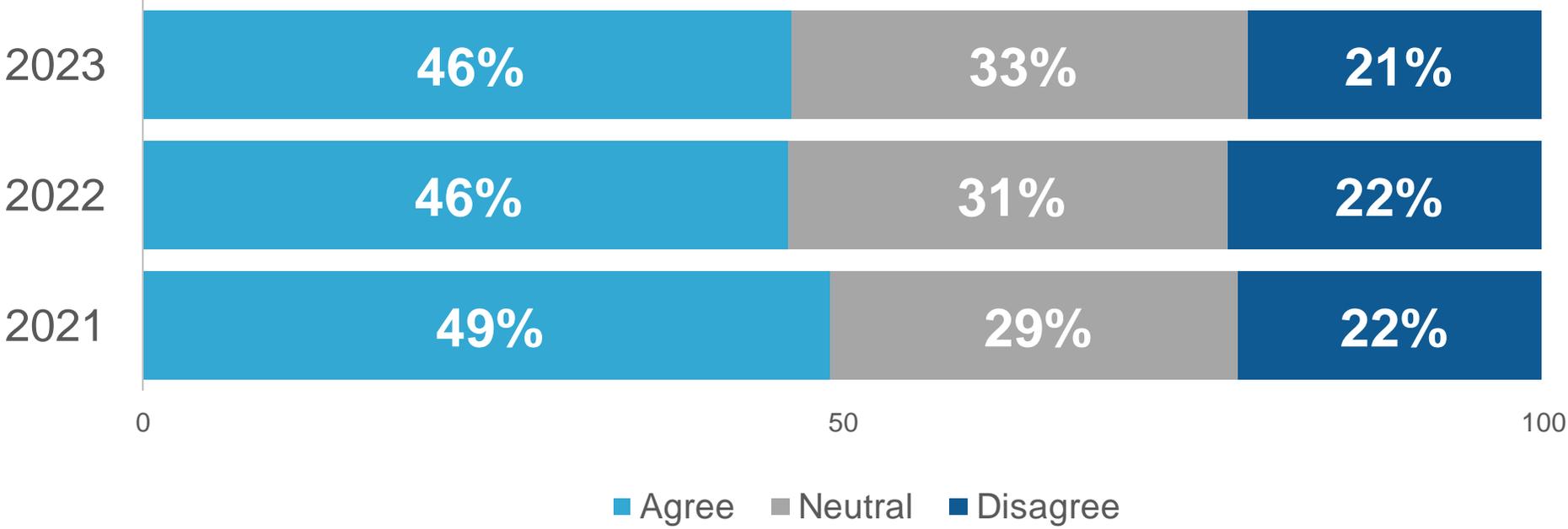




**What do we need to
improve?**

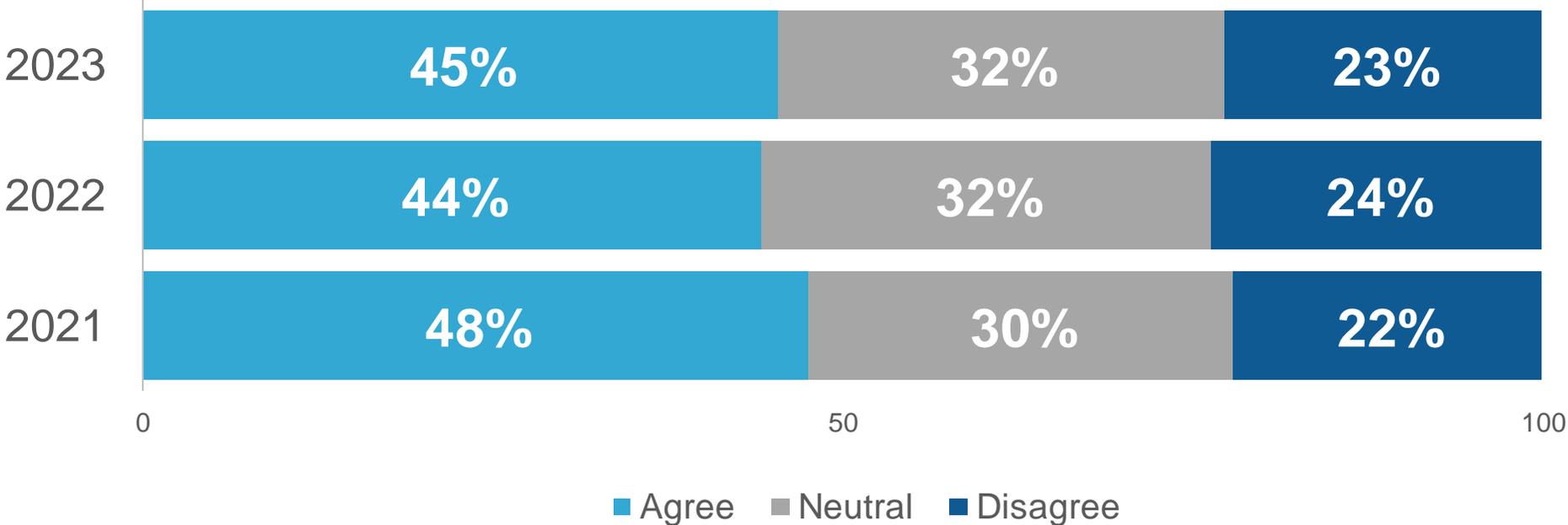
Tourism Employment – U.S.

There are opportunities for career advancement in the tourism industry



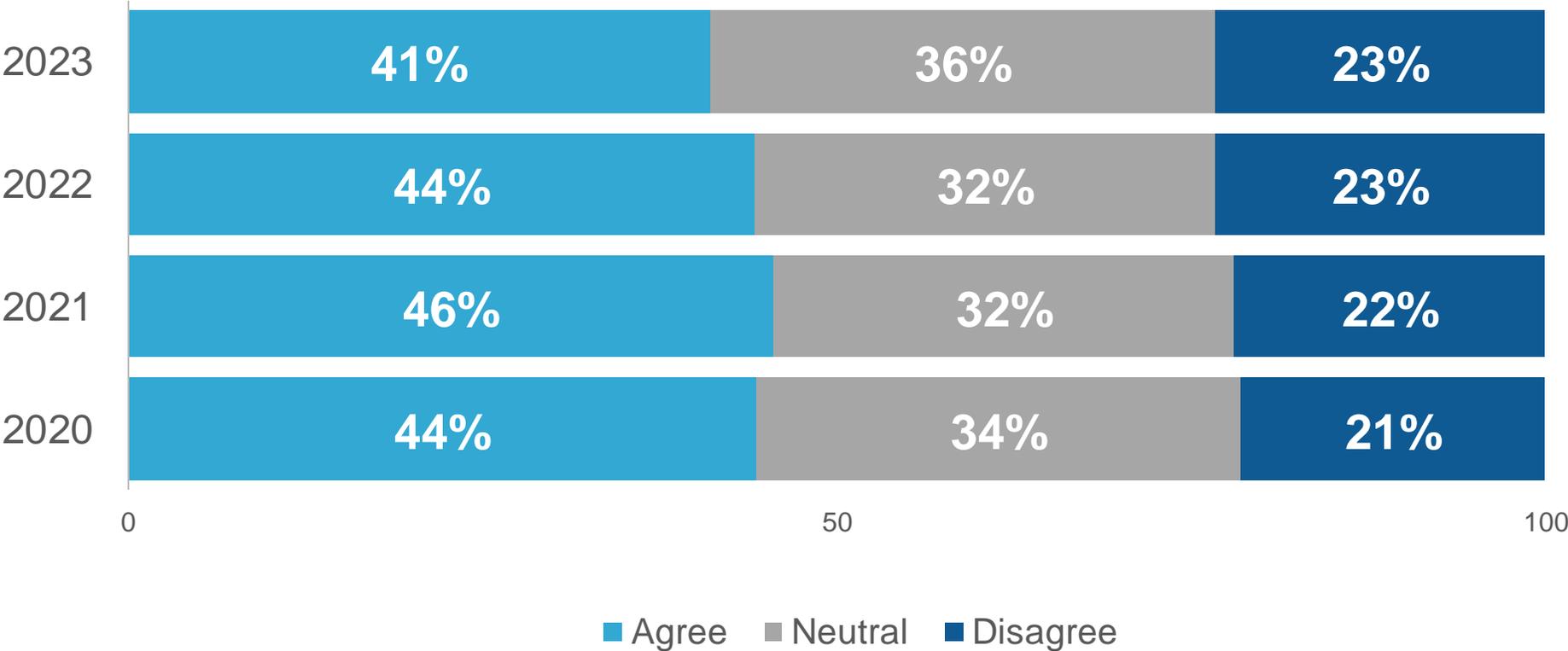
Tourism Employment – U.S.

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

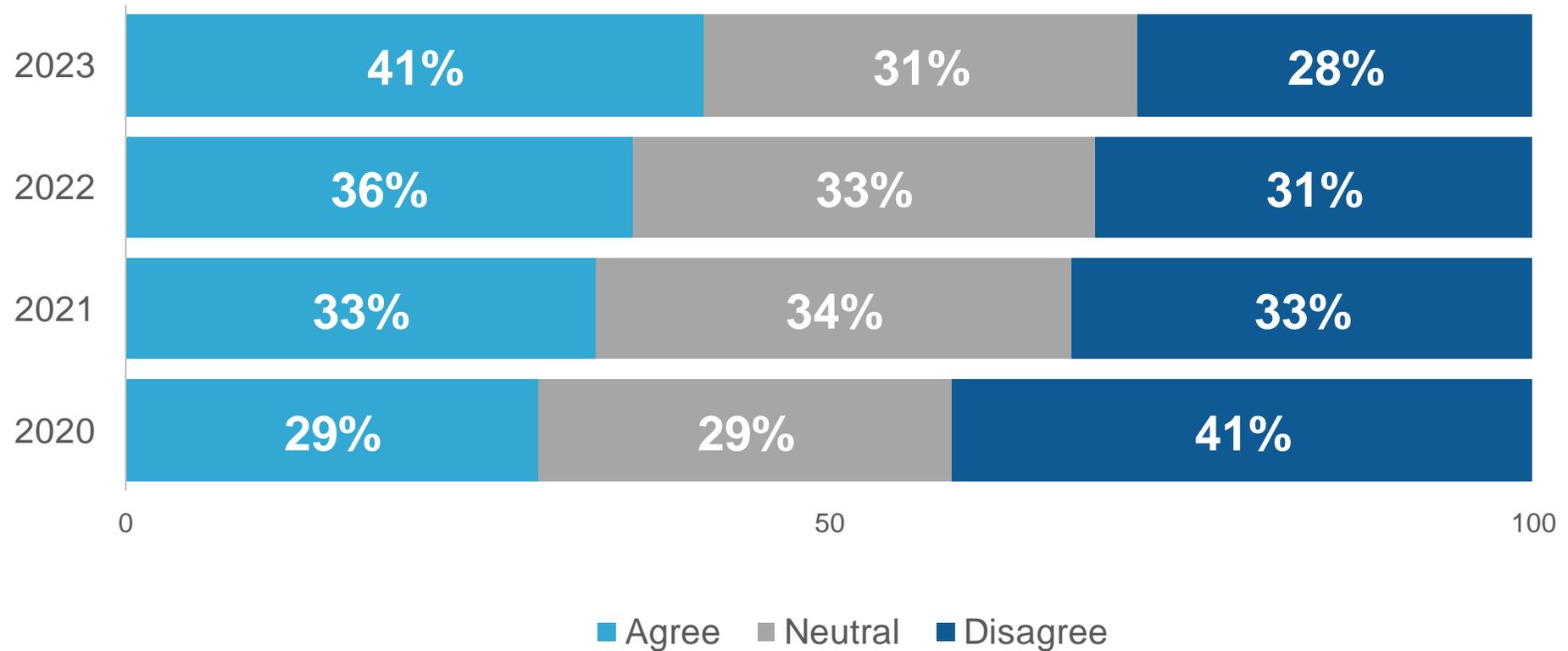


Tourism Employment – U.S.

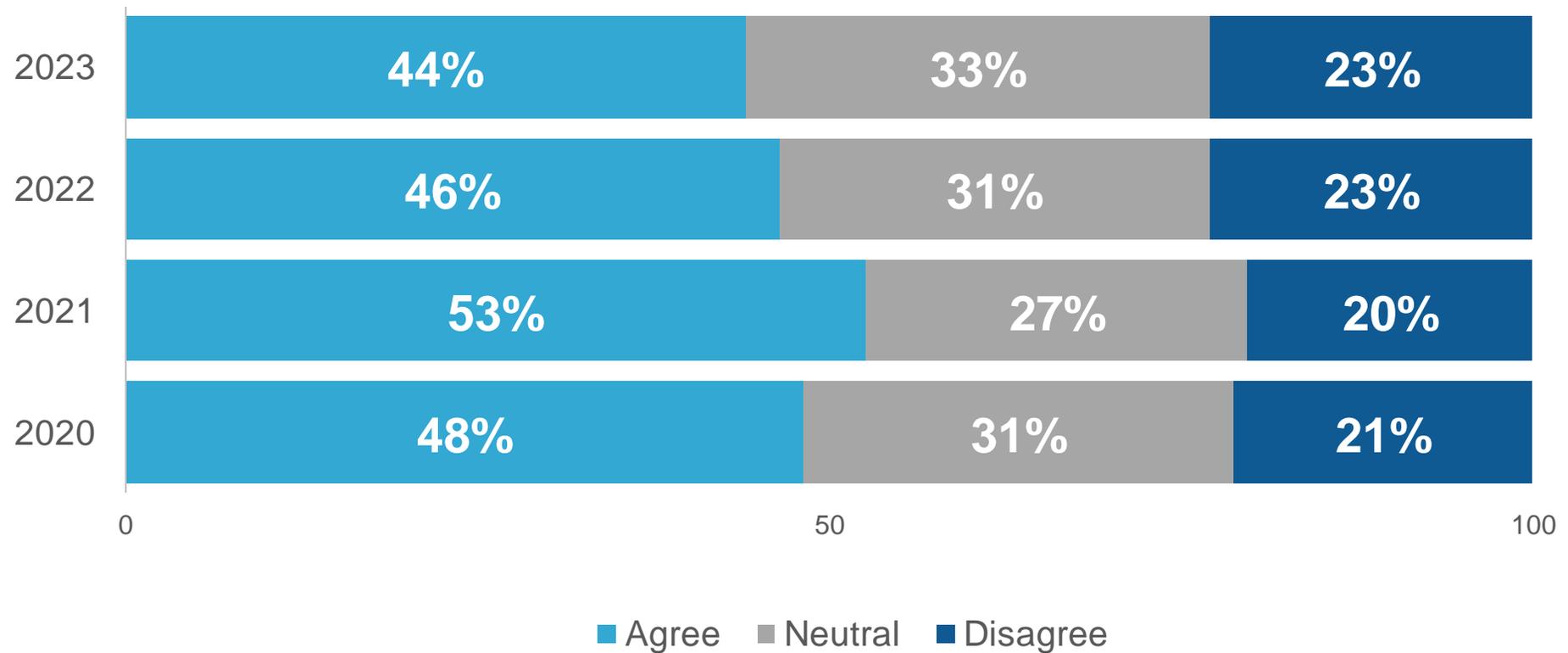
Most jobs in the tourism industry are low-paying and seasonal



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

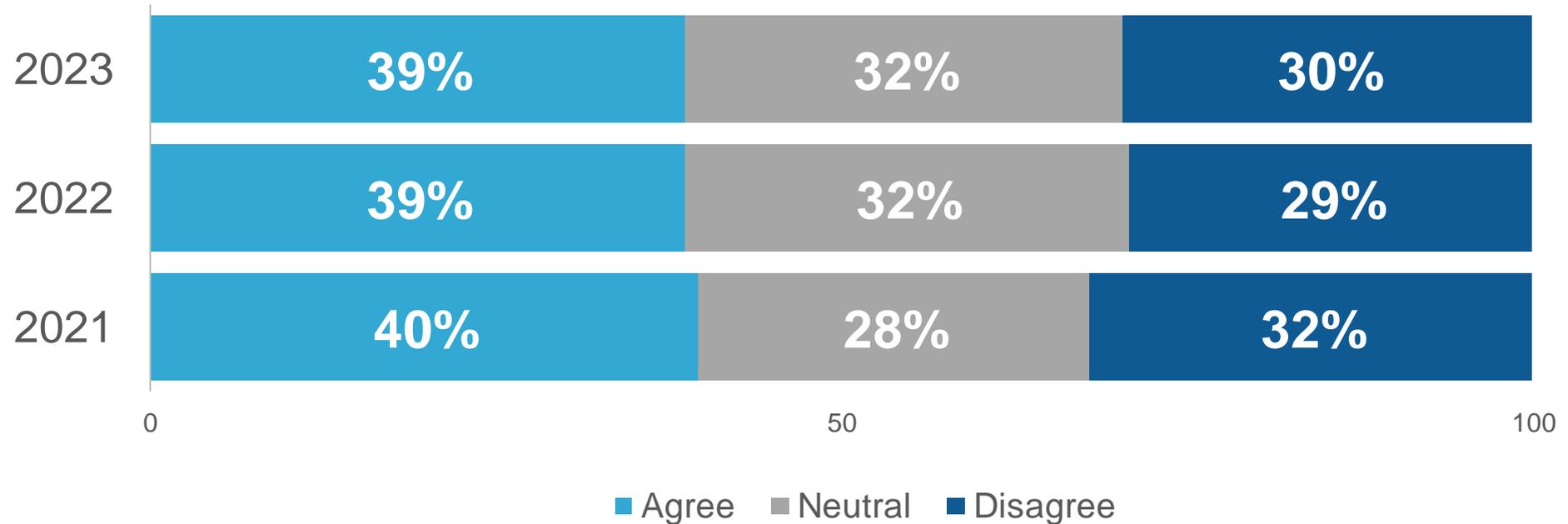


Most jobs in the tourism industry are low-paying and seasonal



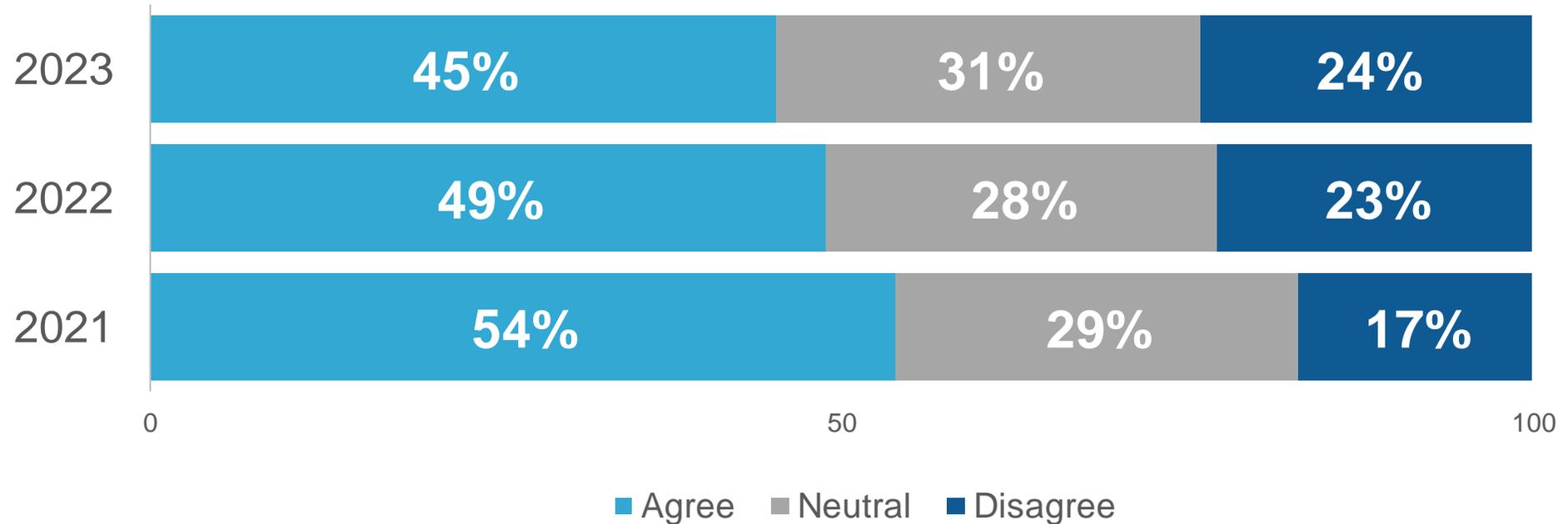
Tourism Employment – U.S. Generation Z

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



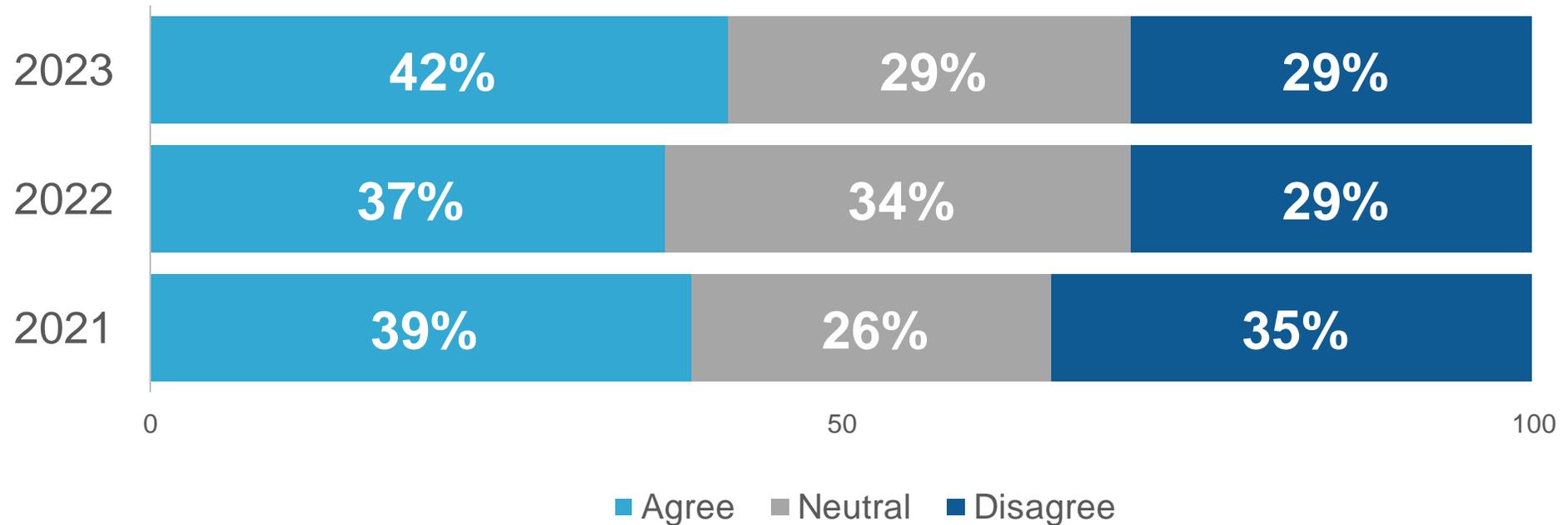
Tourism Employment – U.S. Millennials

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



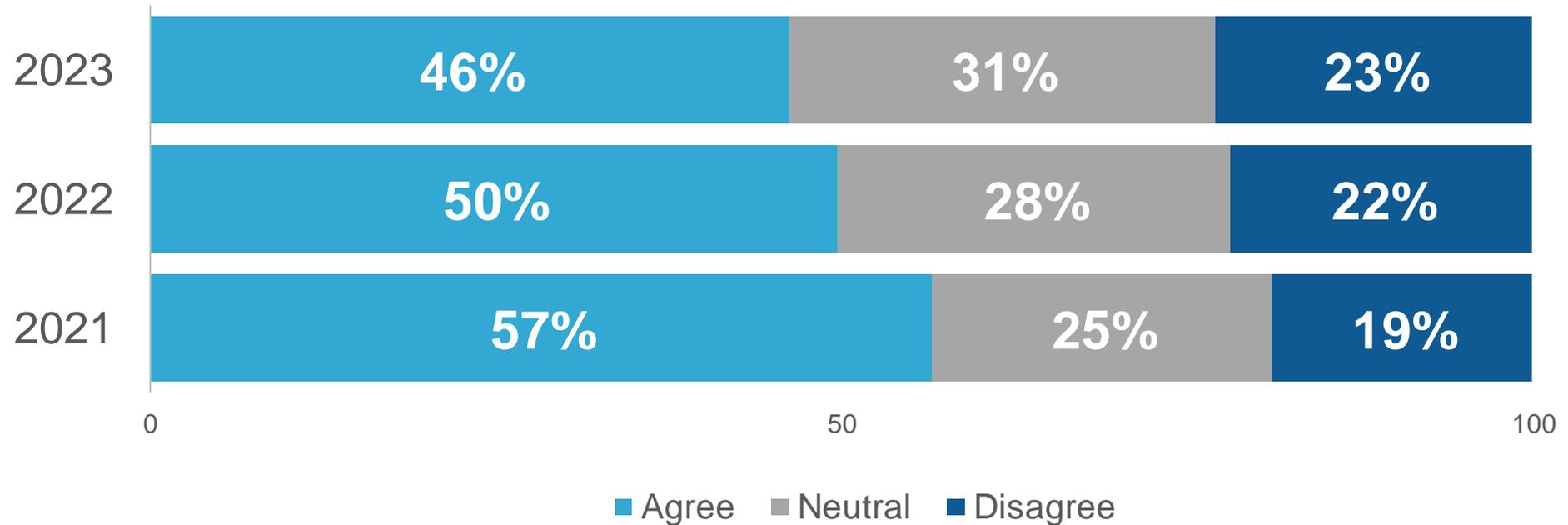
Tourism Employment – U.S. Generation Z

There are opportunities for career advancement in the tourism industry



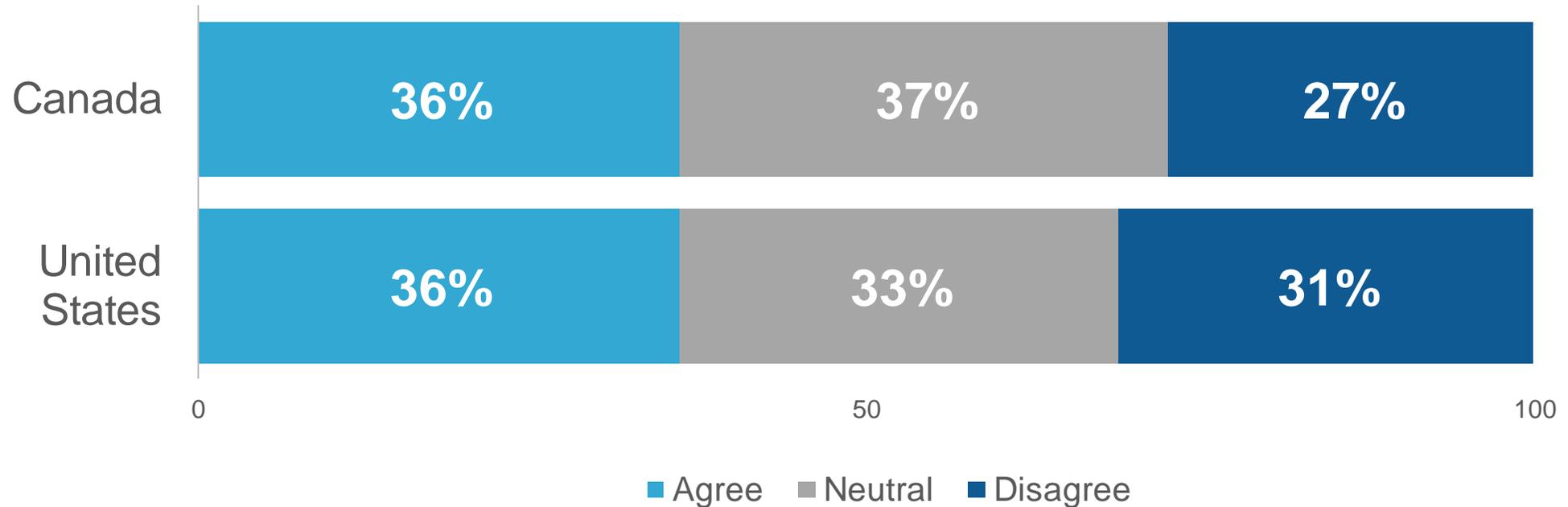
Tourism Employment – U.S. Millennials

There are opportunities for career advancement in the tourism industry



Overall Sentiment About Tourism – New in 2023

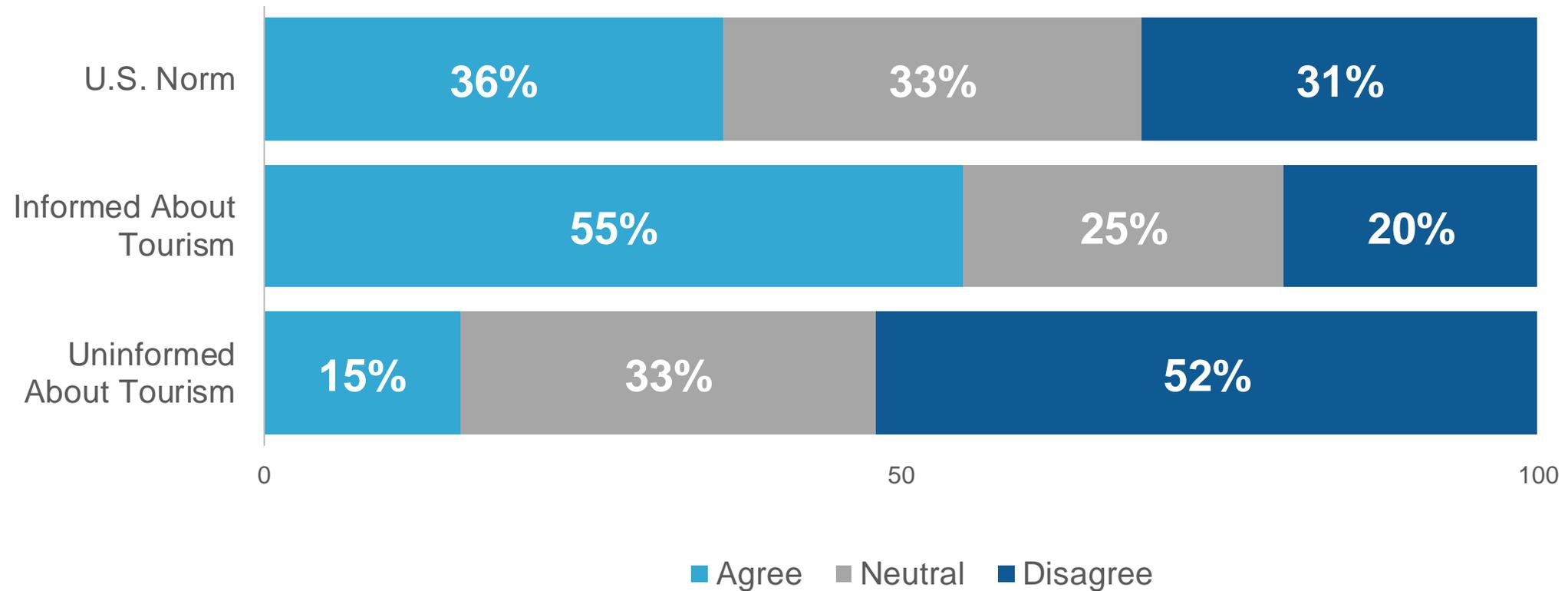
My municipal/local government is doing a good job balancing resident quality of life and visitor satisfaction



Overall Sentiment About Tourism – U.S.

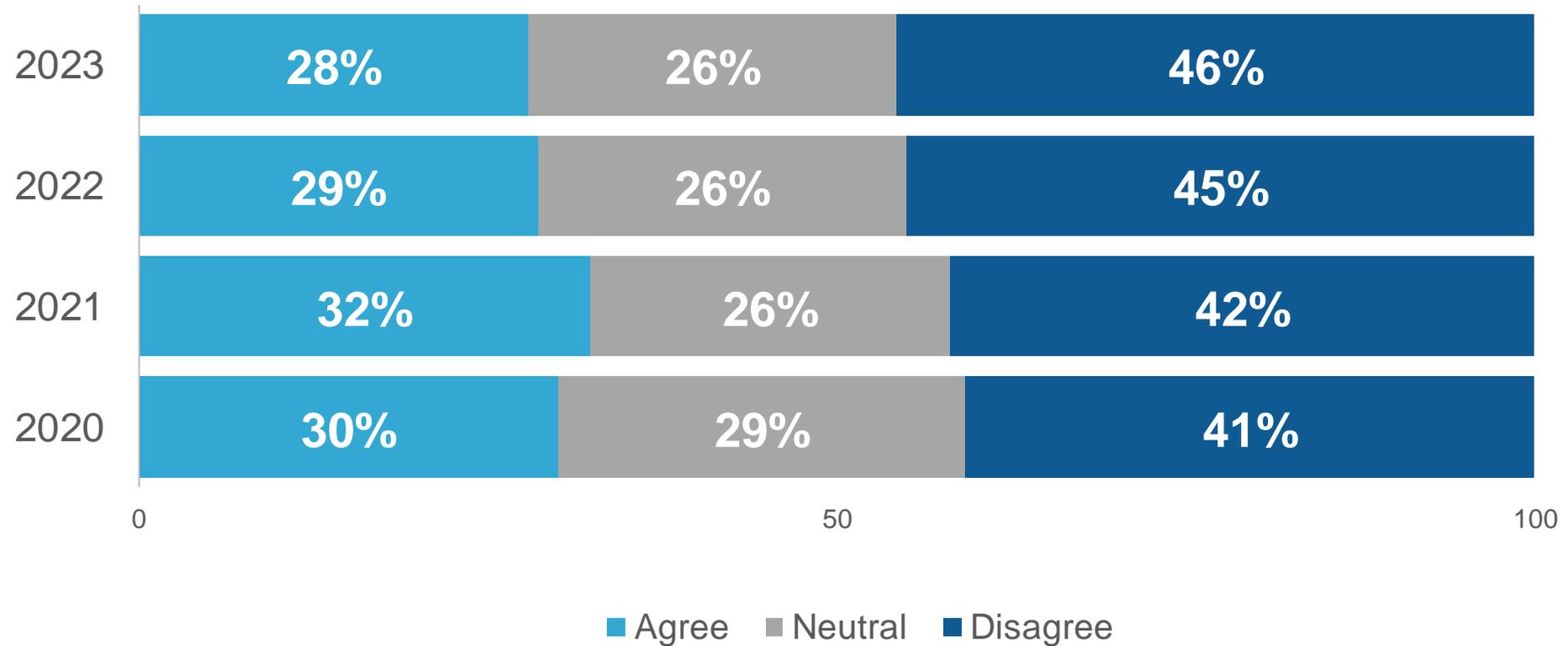
Informed/Uninformed About Tourism

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



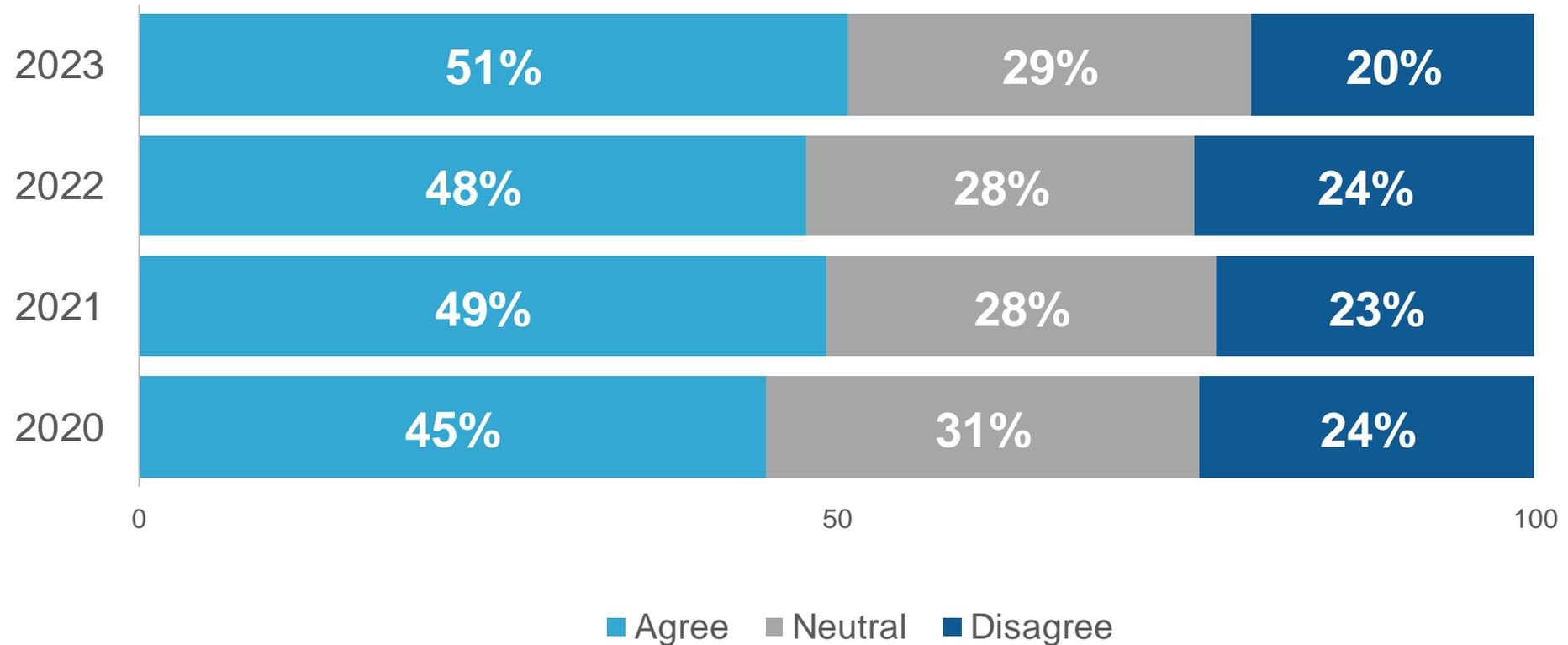
Tourism Development and Growth – U.S.

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



Involvement/Engagement with Tourism – U.S.

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



Key Takeaways

- Canadian residents are still generally more **POSITIVE** towards tourism than Americans
- The need for better resident **ENGAGEMENT** & communication persists!
- Still a strong **DISCONNECT** between tourism and quality of life/economy in the U.S.
- Our **WORKFORCE** challenge is now multi-generational.

The Bottom Line:

- **Continue to highlight the importance and value of tourism beyond the usual suspects – Use Metrics that are Meaningful and Understood by Key Stakeholders & Residents...**
- **Showcase career opportunities in our industry – Multi-generational Push (GenX,Y, &Z!)... Look at life-stage!**
- **Engage with residents and communicate your destination stewardship efforts – Every DMO Needs A Community Engagement Plan!**

What's Next:

- **Full Reports Released – Nov.'23
Available via Destinations
International**
 - **USA**
 - **Canada**
- **Updated White Paper – Jan/Feb '24**

What's Next:

- **Ongoing Resident Sentiment Partner Program with Destinations International**
 - **Member Exclusive Pricing**
 - **National/Regional Comparisons**
 - **Supports the DI Foundation**
 - **Reach out or talk to us here**
- **Available NOW for:**
 - **U.S. Destinations**
 - **Canadian Destinations**

Thank You!

Amir Eylon

President & CEO, Partner

aeylon@longwoods-intl.com

longwoods-intl.com

 Longwoods International

 @Lngwds

 aeylon

 Longwoods
INTERNATIONAL





“Any questions?”

LECTION

David S. Pumpkins



DESTINATIONS
INTERNATIONAL

Thank You!

Amir Eylon

aeylon@longwoods-intl.com

longwoods-intl.com

 [LongwoodsInternational](#)

 [Lngwds](#)

 [Longwoods International](#)