



DESTINATIONS  
INTERNATIONAL

# Understanding the Pulse of Your Residents

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

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**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



# **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

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

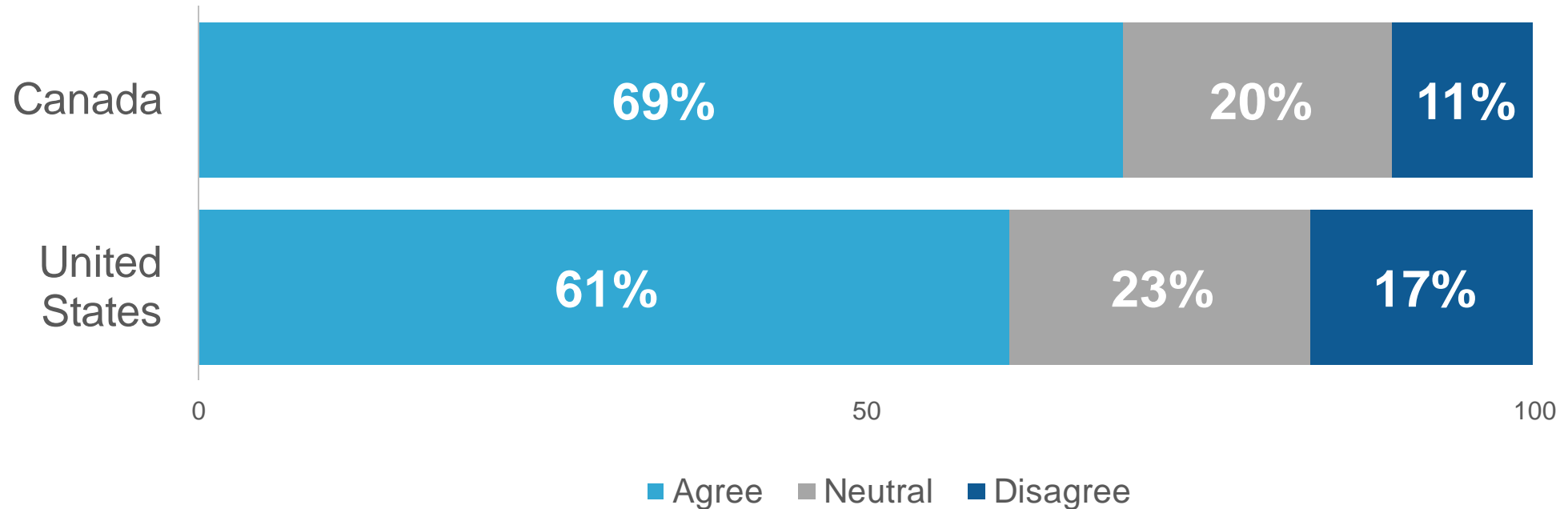


## Overall Sentiment About Tourism



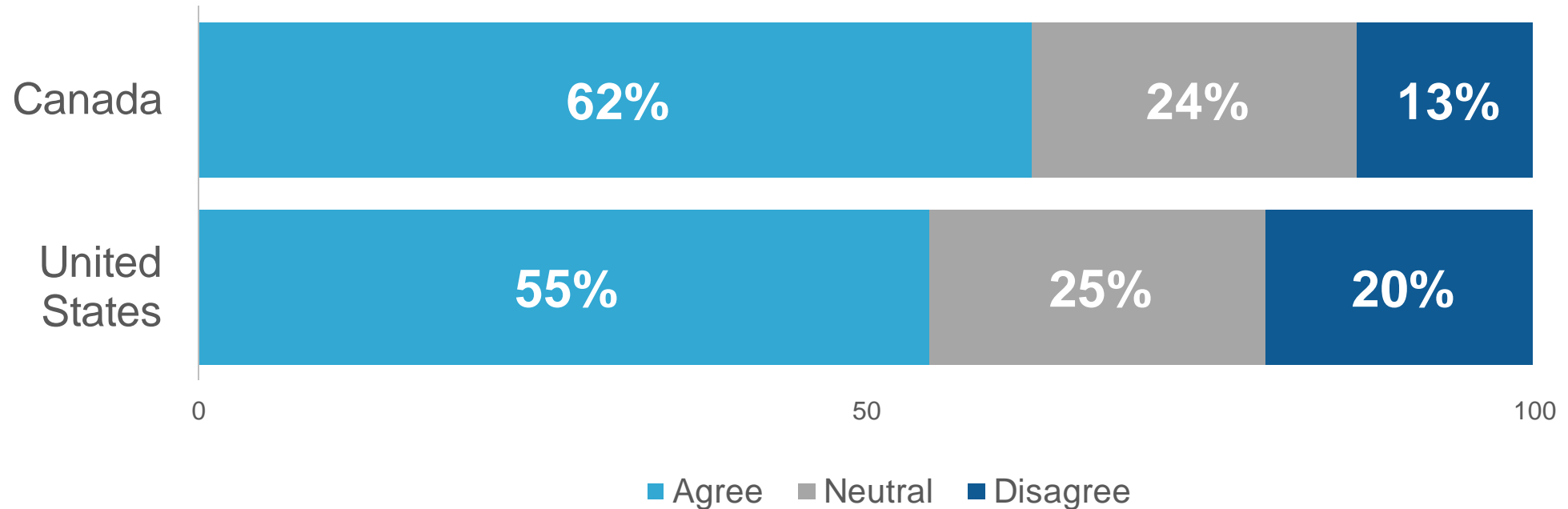
# Overall Sentiment About Tourism

**Overall, I think tourism is good for my local area**



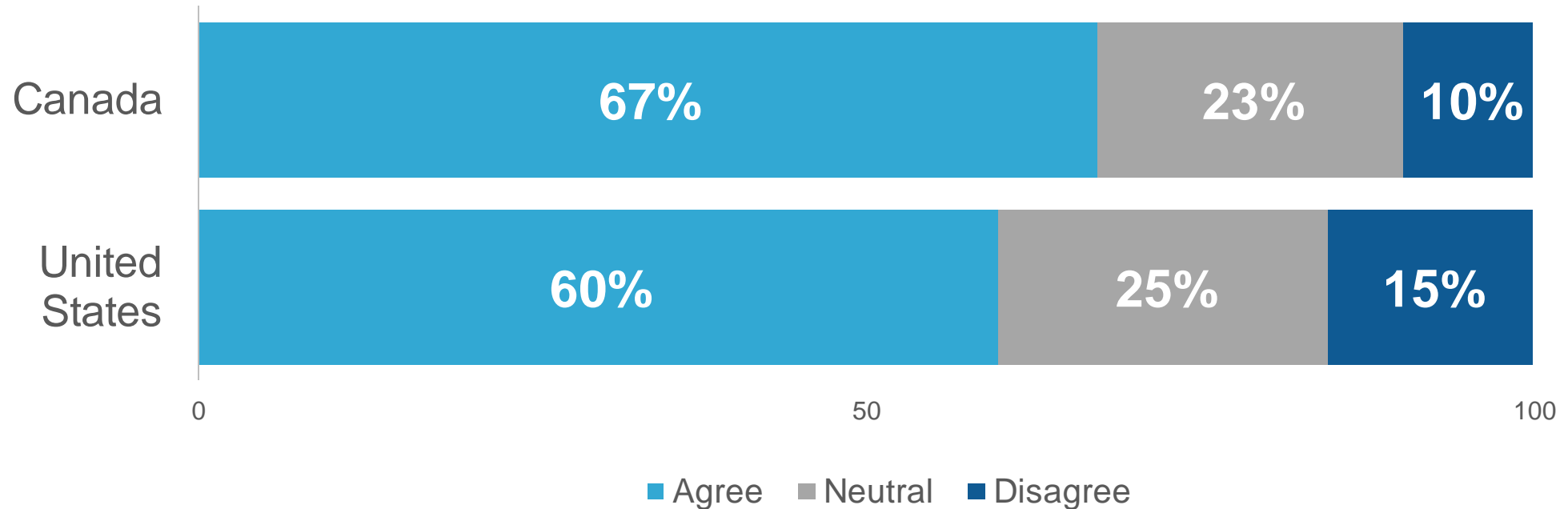
# Overall Sentiment About Tourism

**I want tourism to be important in my local area**



# Overall Sentiment About Tourism

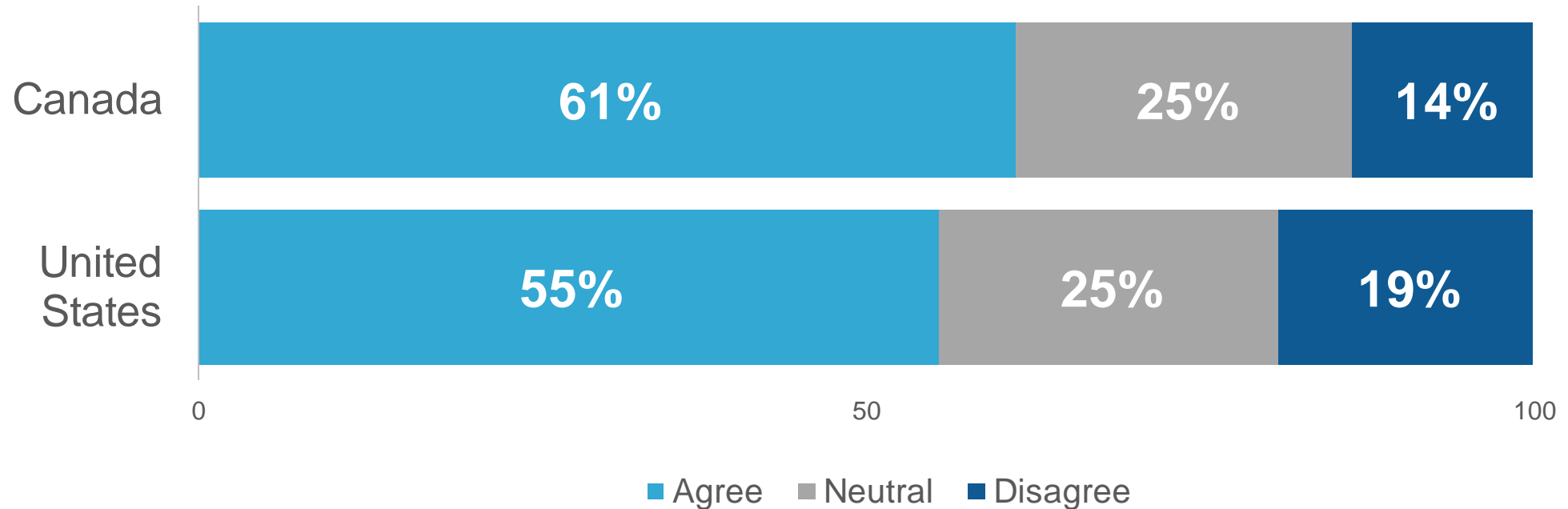
**In general, the positive benefits of tourism outweigh the negative impacts**





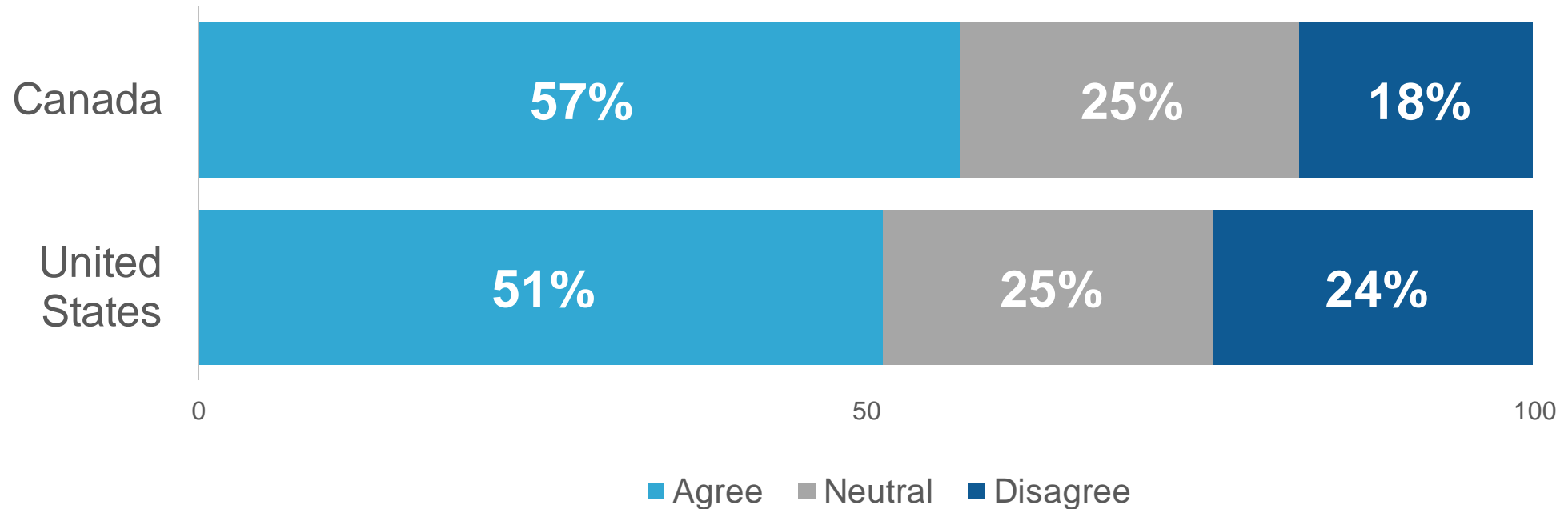
# Overall Sentiment About Tourism

**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



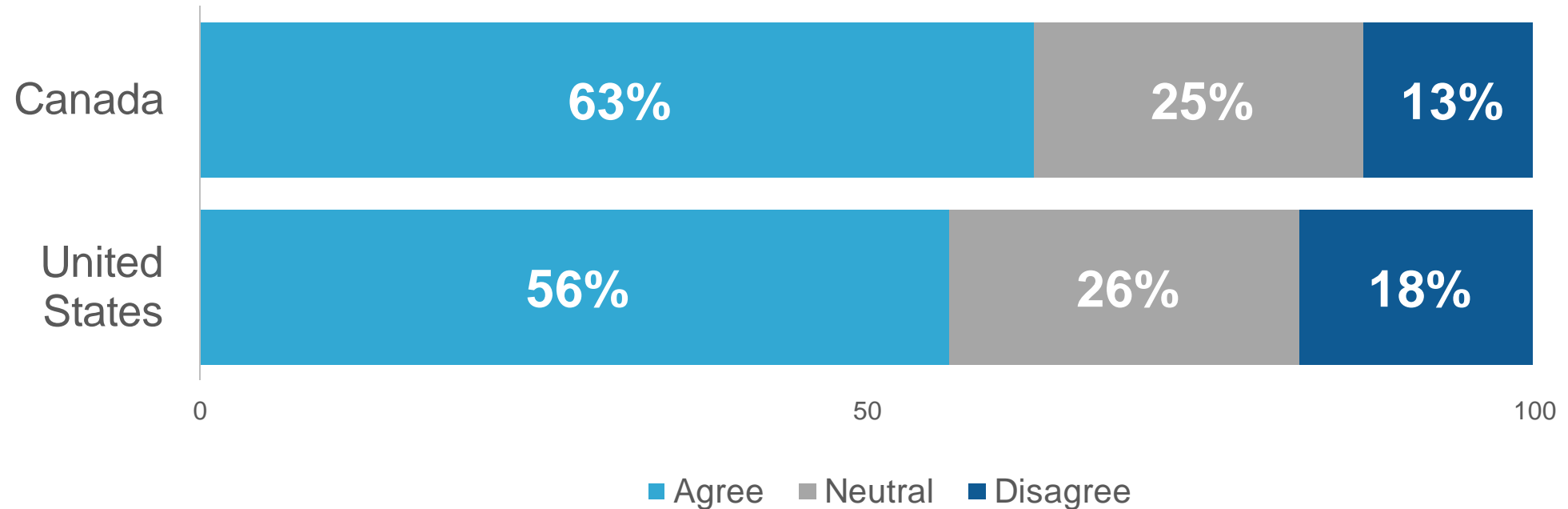
# Involvement and Engagement with Tourism





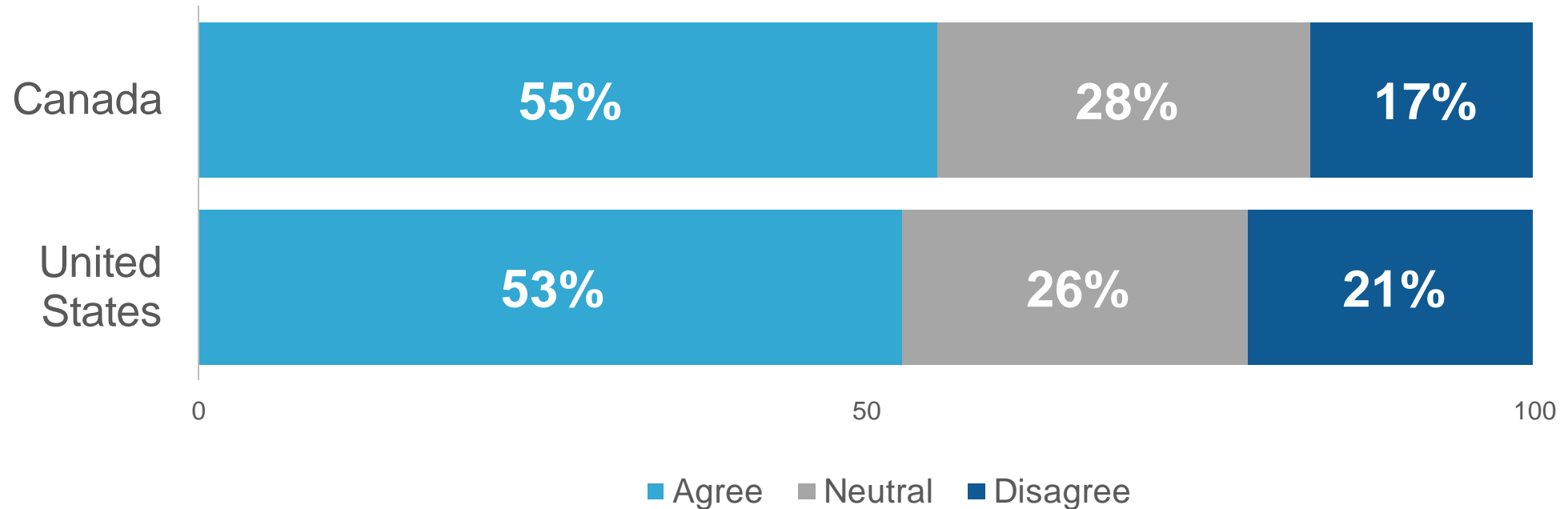
# Involvement/Engagement with Tourism – **New in 2023**

**I welcome tourists to this area**



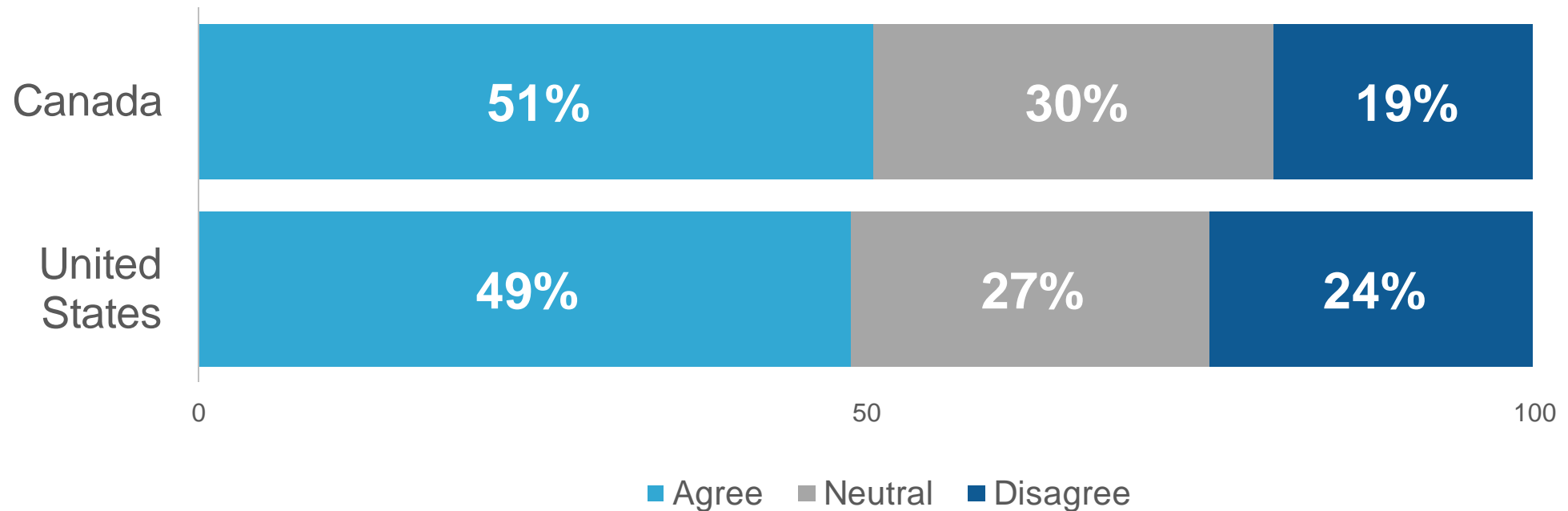
# Involvement/Engagement with Tourism – **New in 2023**

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



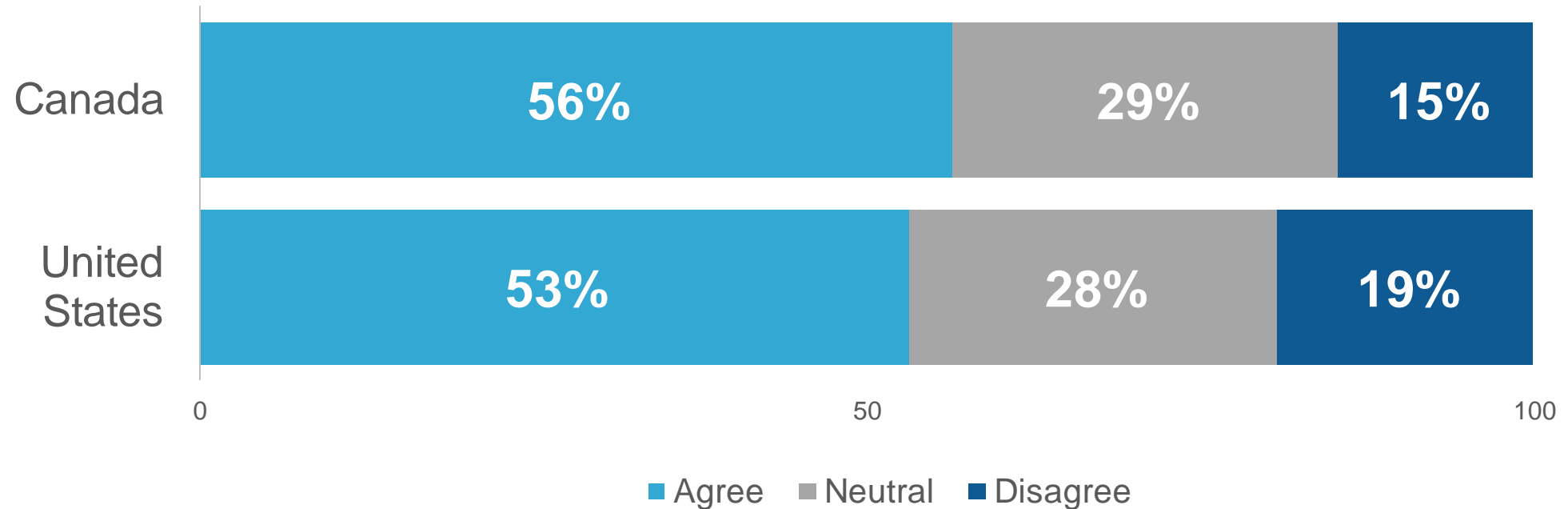
# Involvement/Engagement with Tourism

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



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

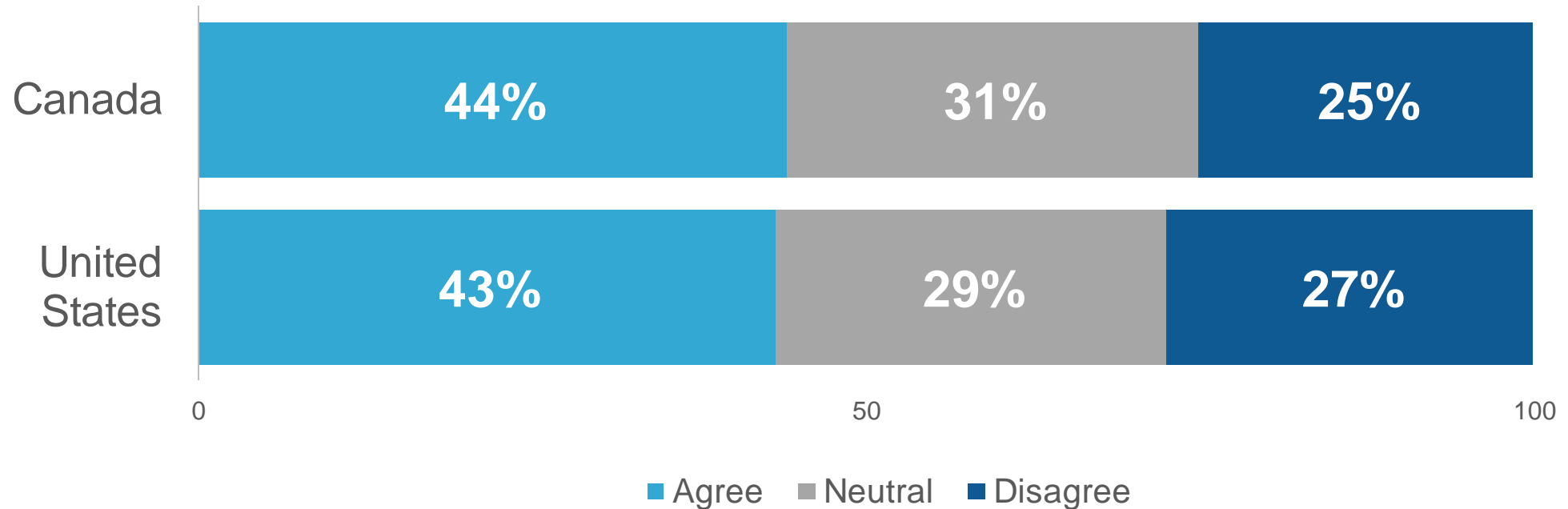
**I'm proud of what this area offers tourists**





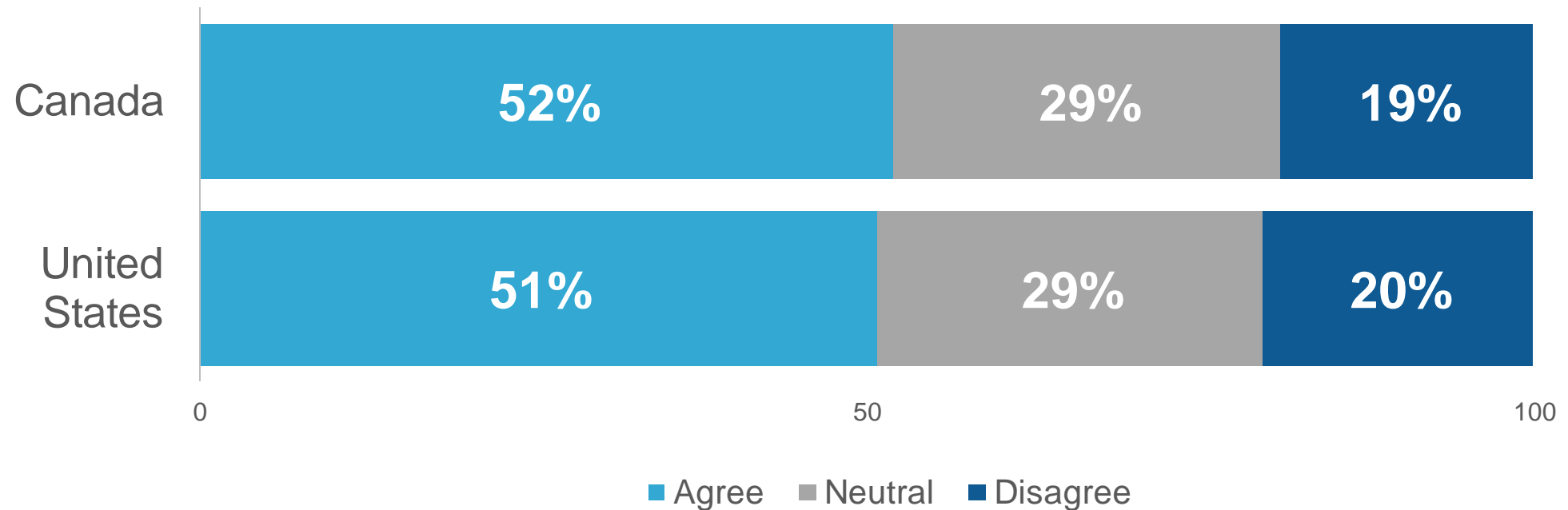
# Involvement/Engagement with Tourism

**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**

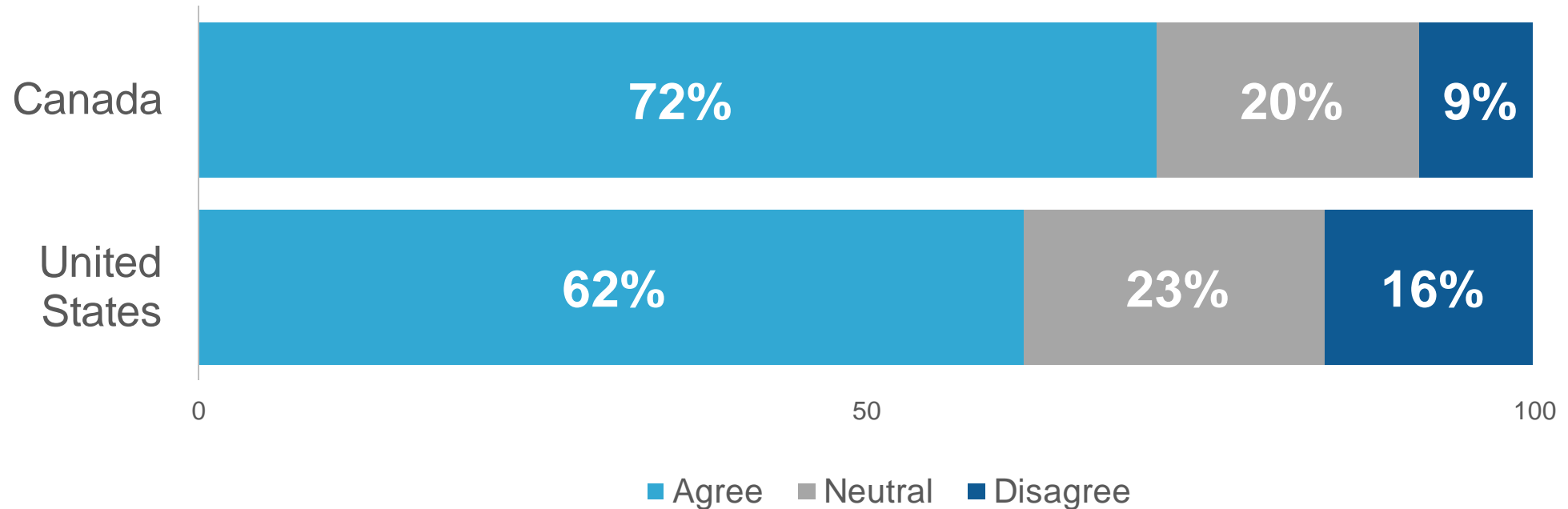




# Tourism Development and Growth

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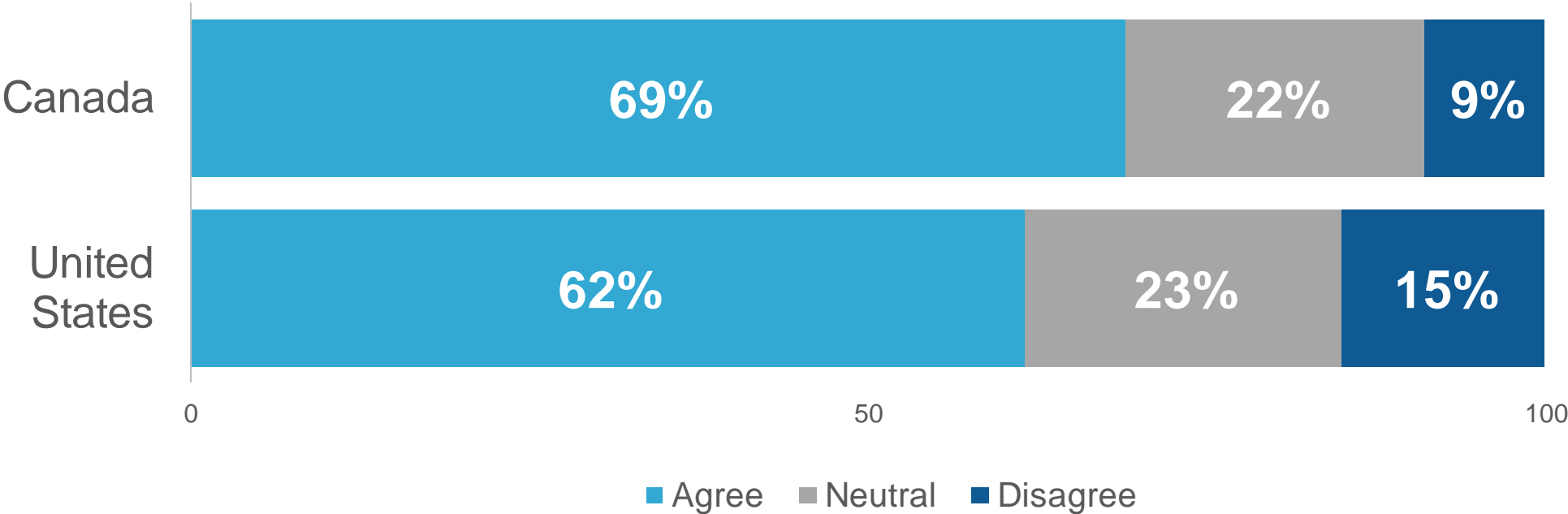
**I believe tourism should be encouraged here**





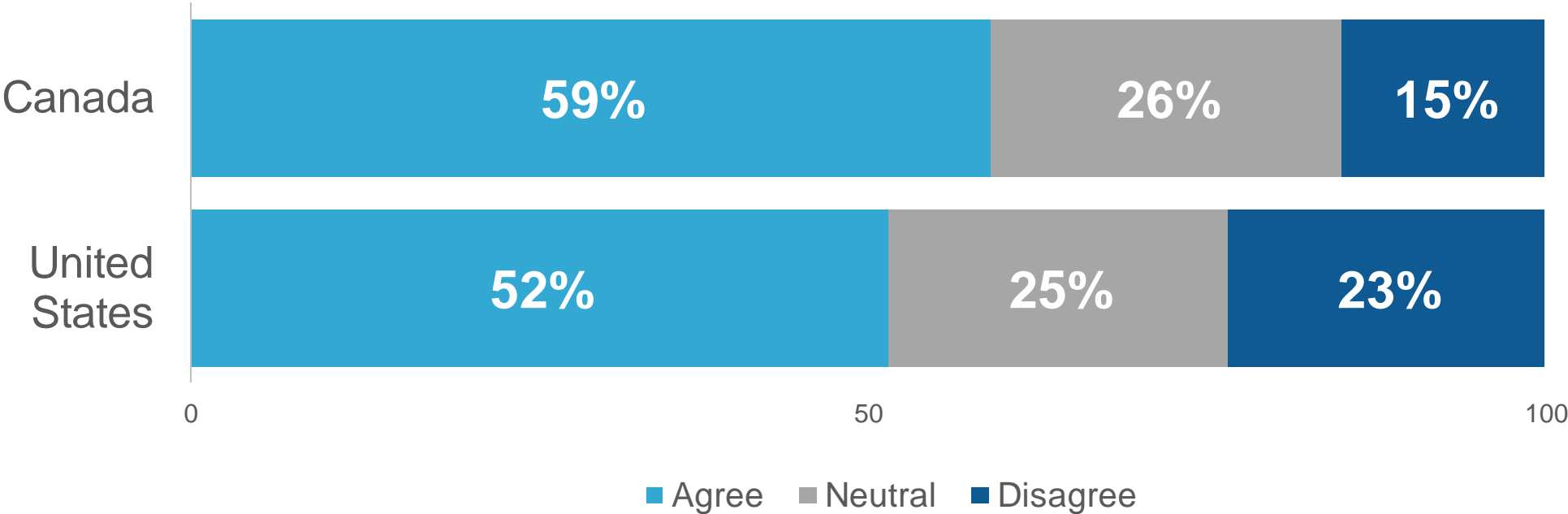
# Tourism Development and Growth

I support tourism growth



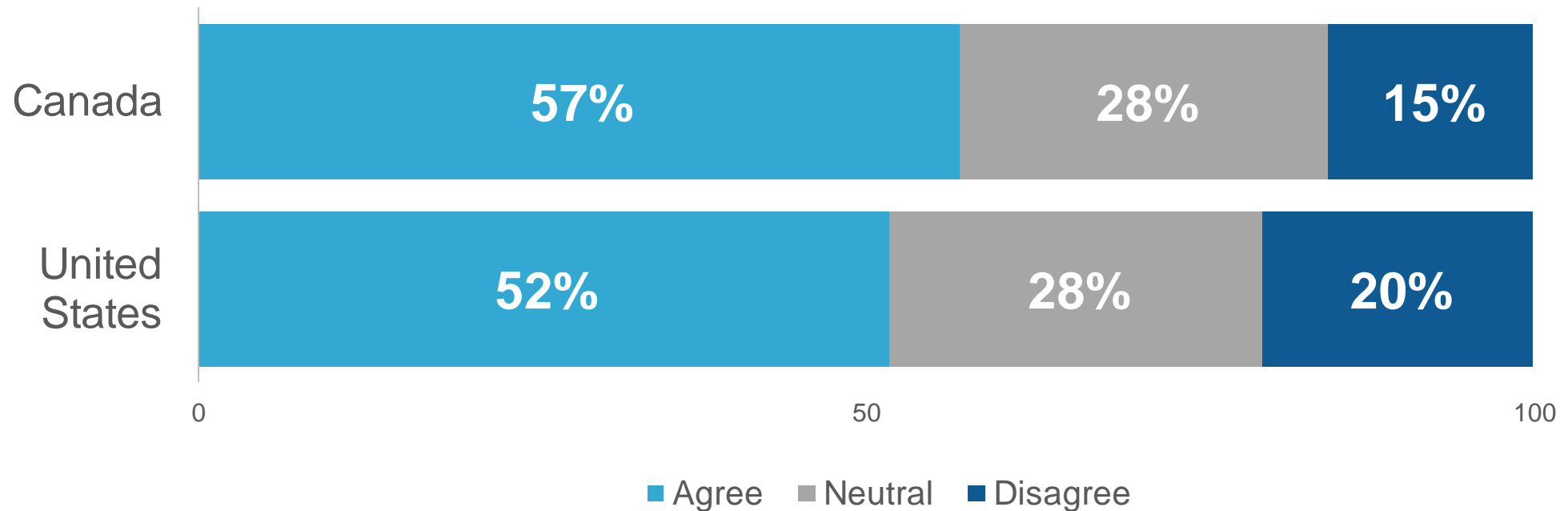
# Tourism Development and Growth

I would like to see more tourists coming to my area



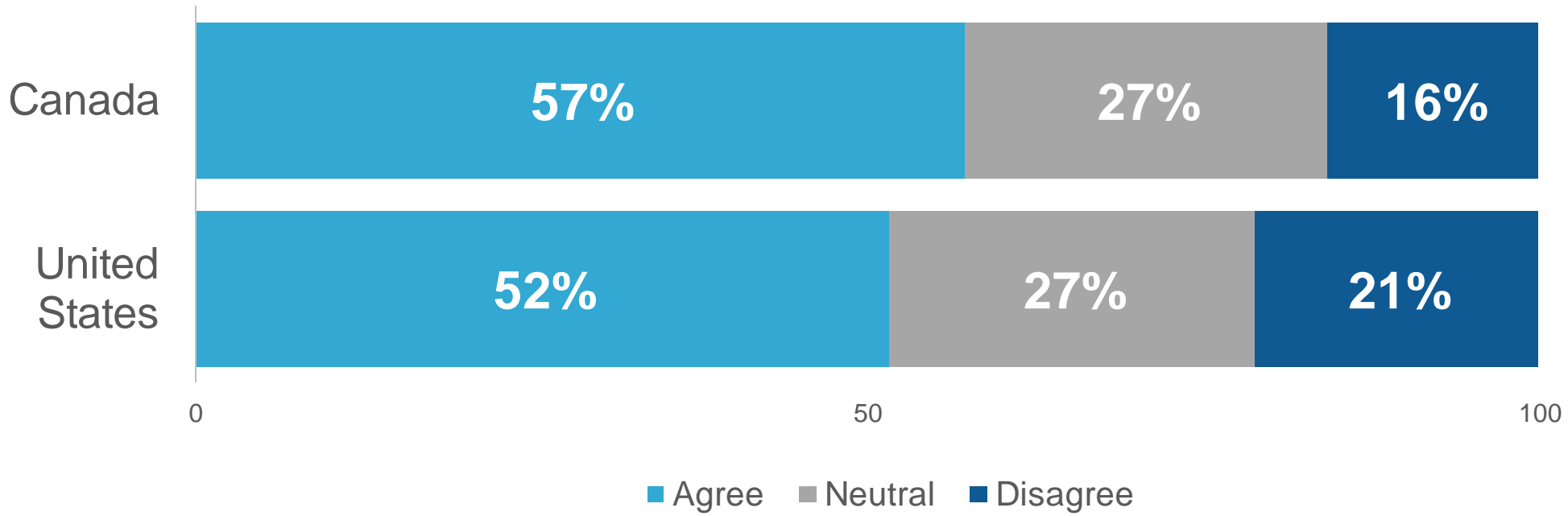
# Tourism Development and Growth

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



# Tourism Development and Growth

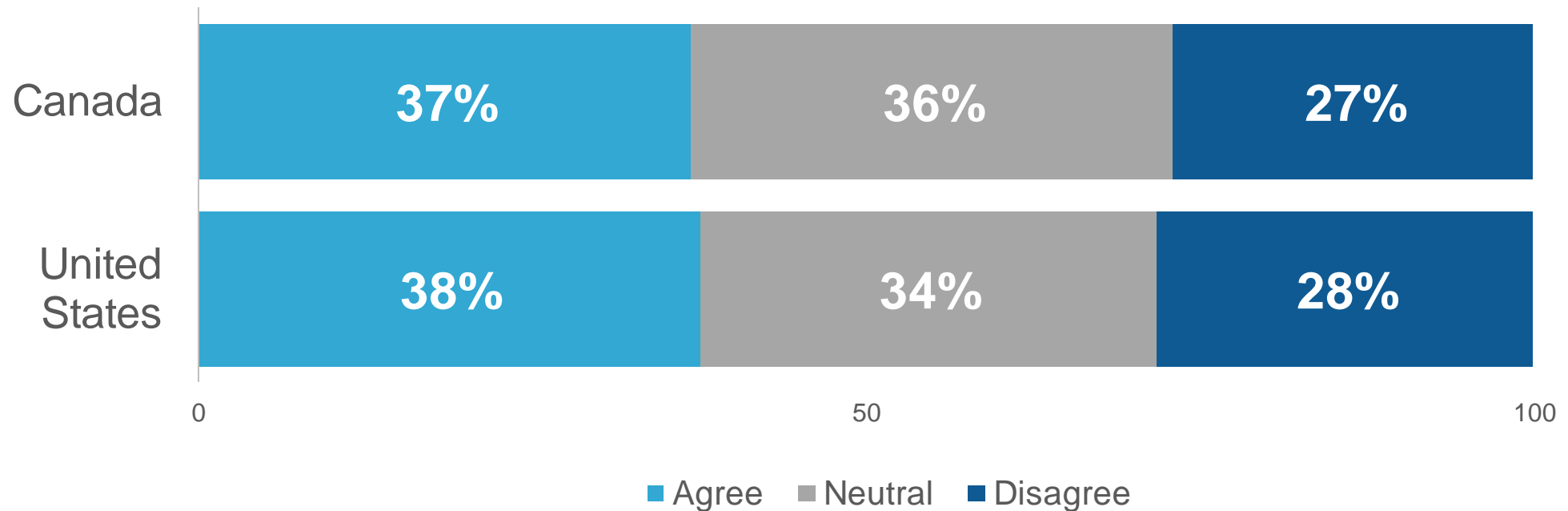
**I support building new tourism facilities that will attract visitors to this area**





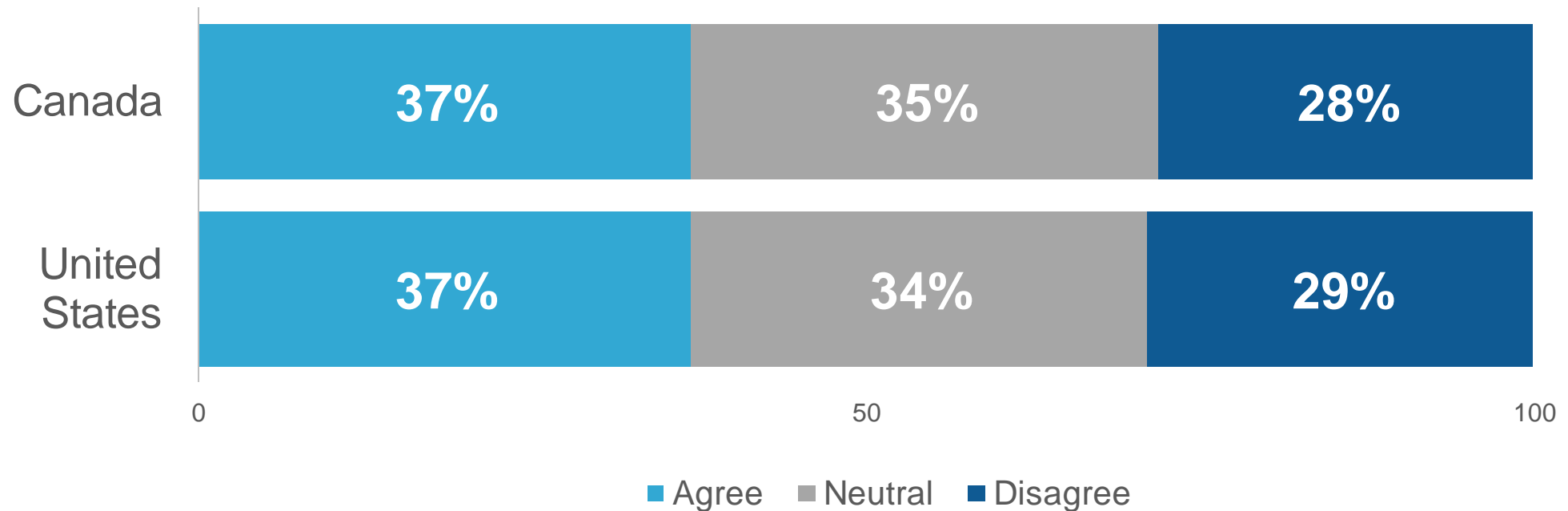
# Tourism Development and Growth – **New in 2023**

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



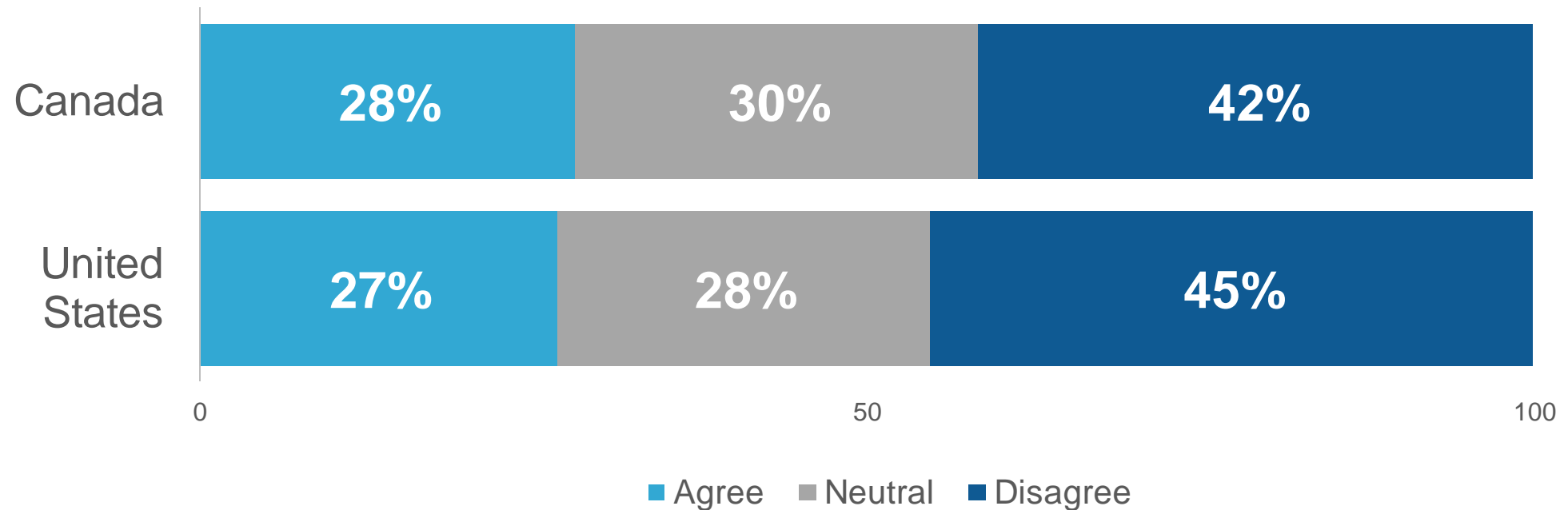
# Tourism Development and Growth – **New in 2023**

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



# Tourism Development and Growth

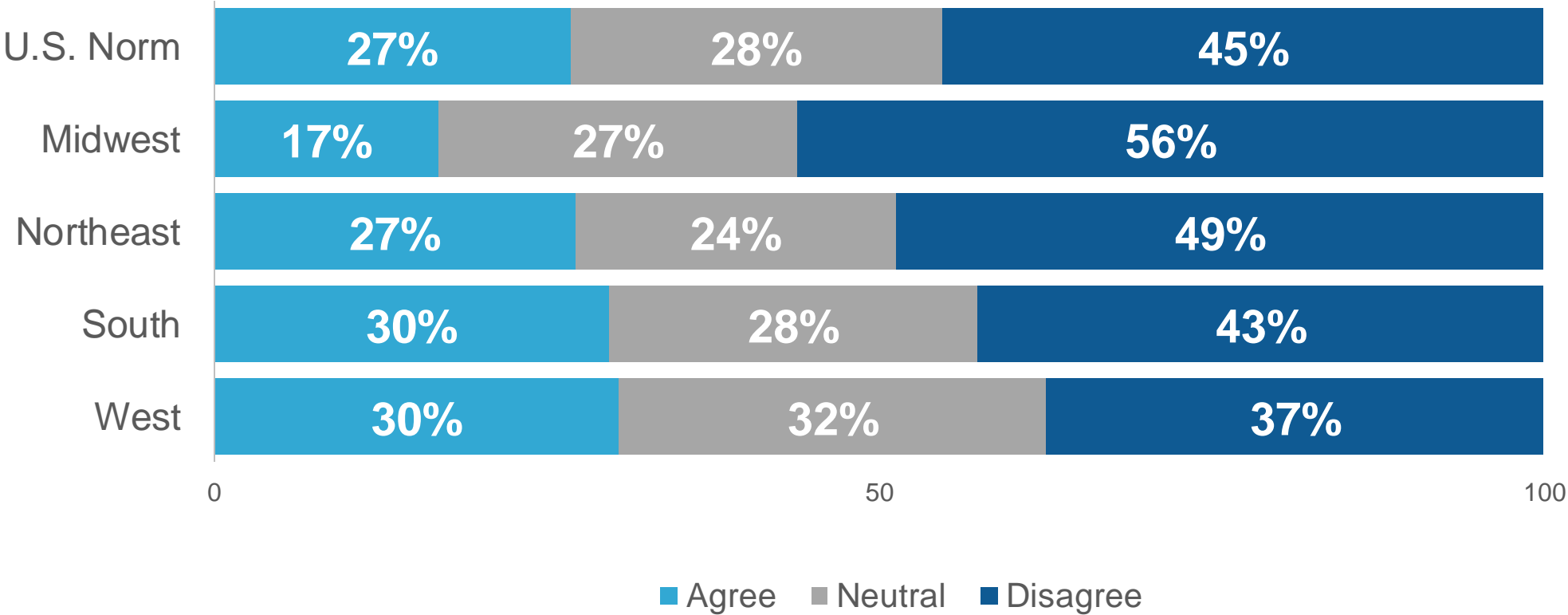
**Tourism development is happening too fast in this area**



# Tourism Development and Growth

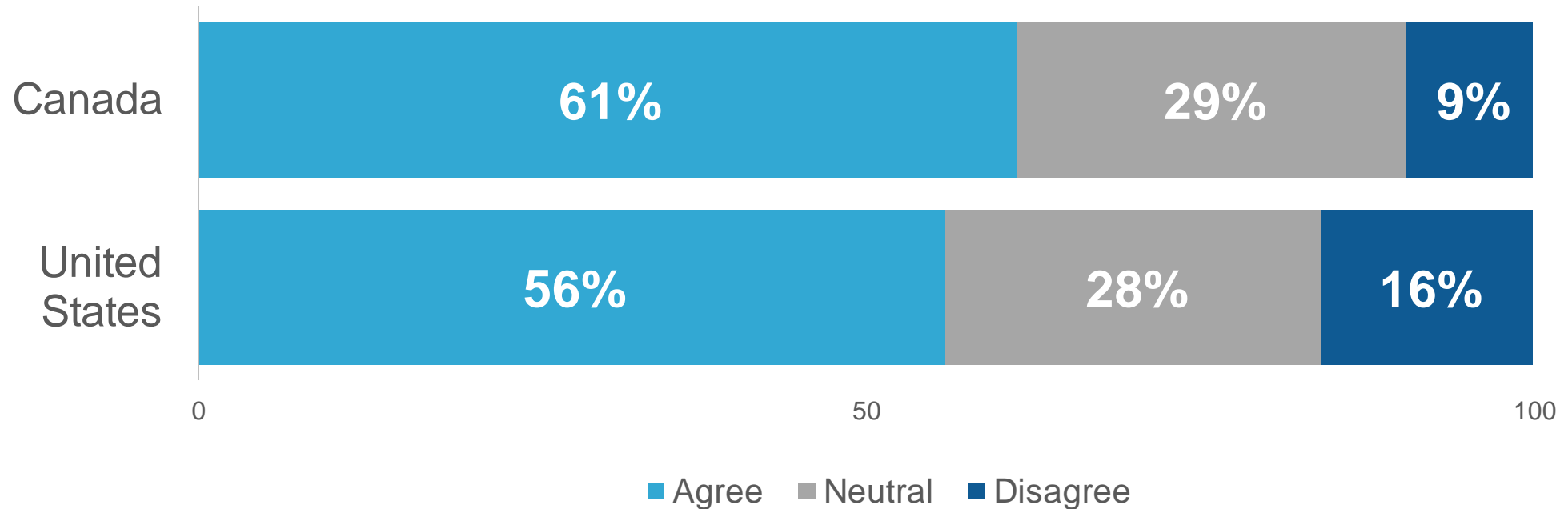
## Regional Comparisons

### Tourism development is happening too fast in this area



# Tourism Development and Growth

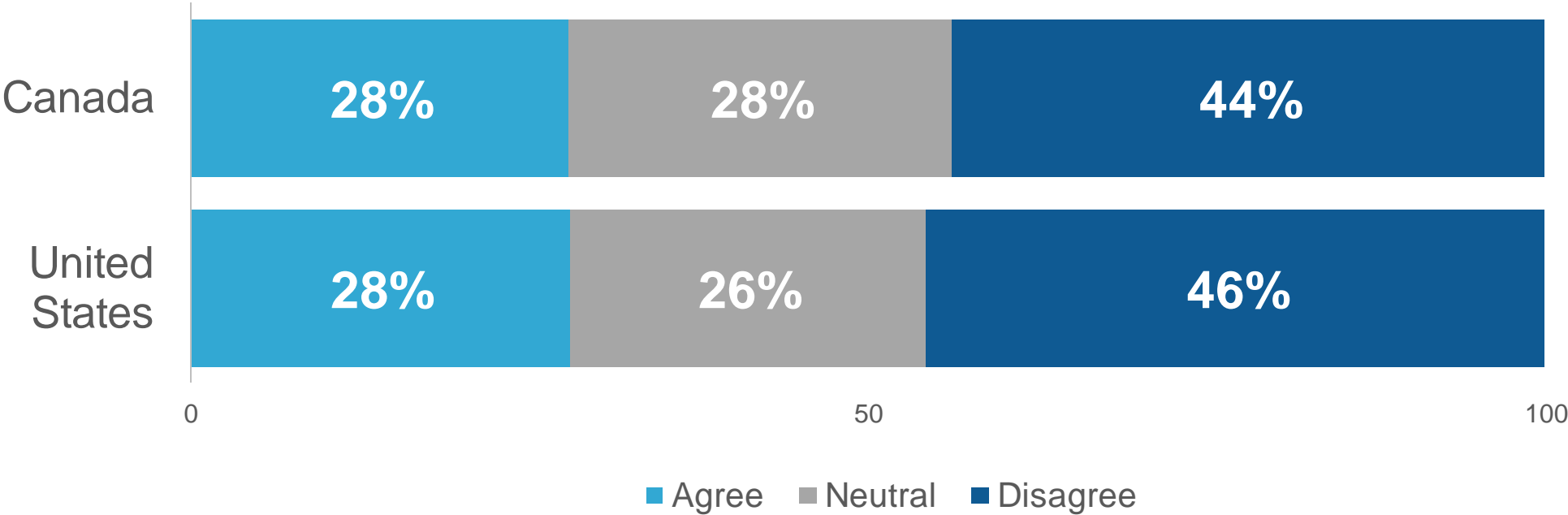
**We need planned and controlled tourism development**





# Tourism Development and Growth

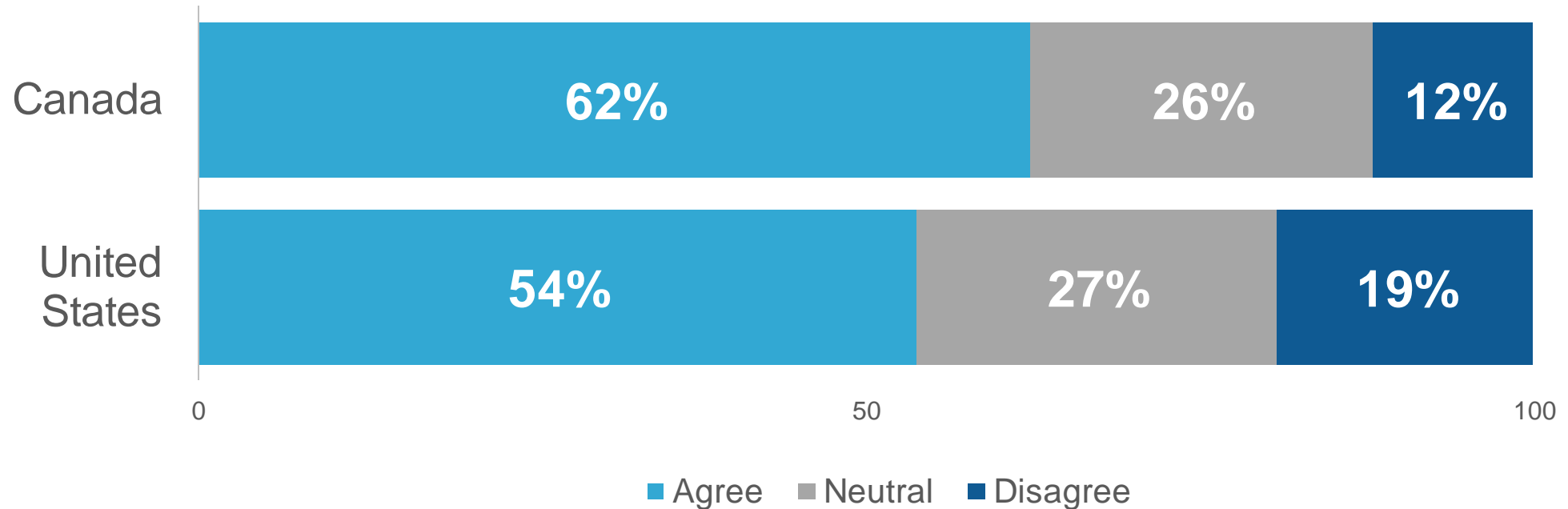
**Residents are consulted when major tourism development takes place in this area**



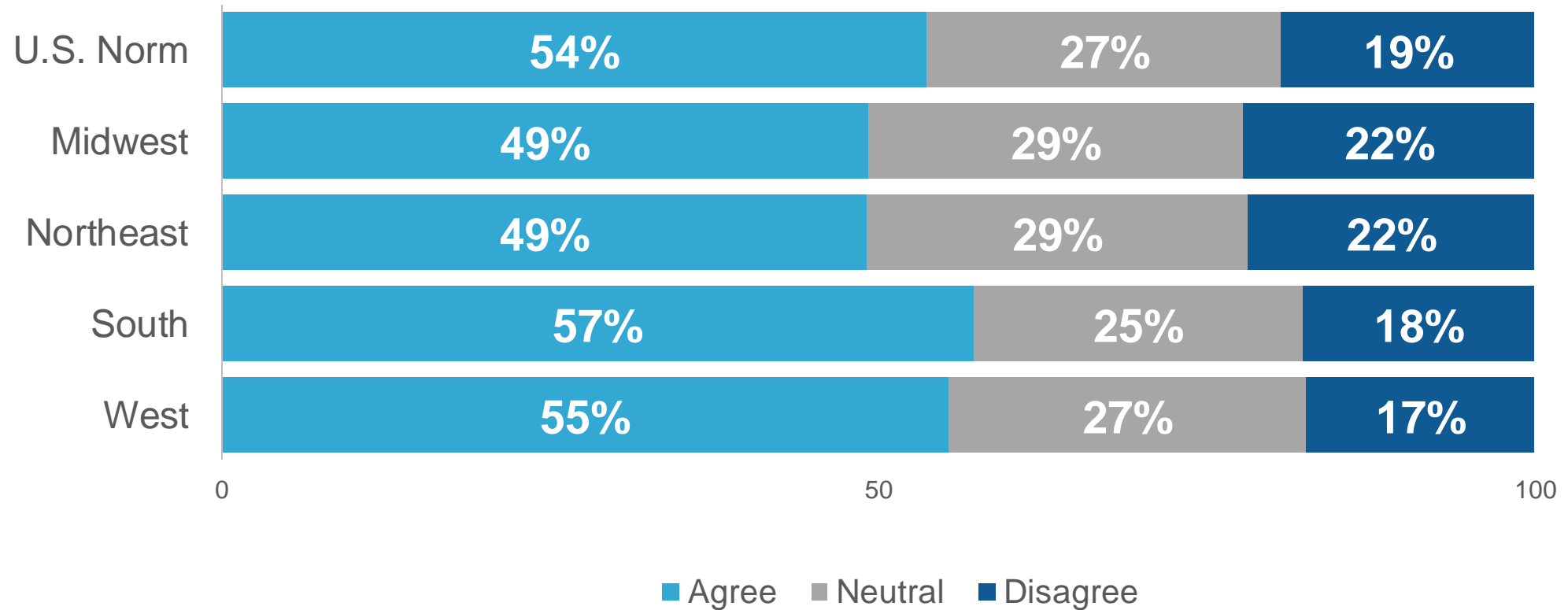


# Economy

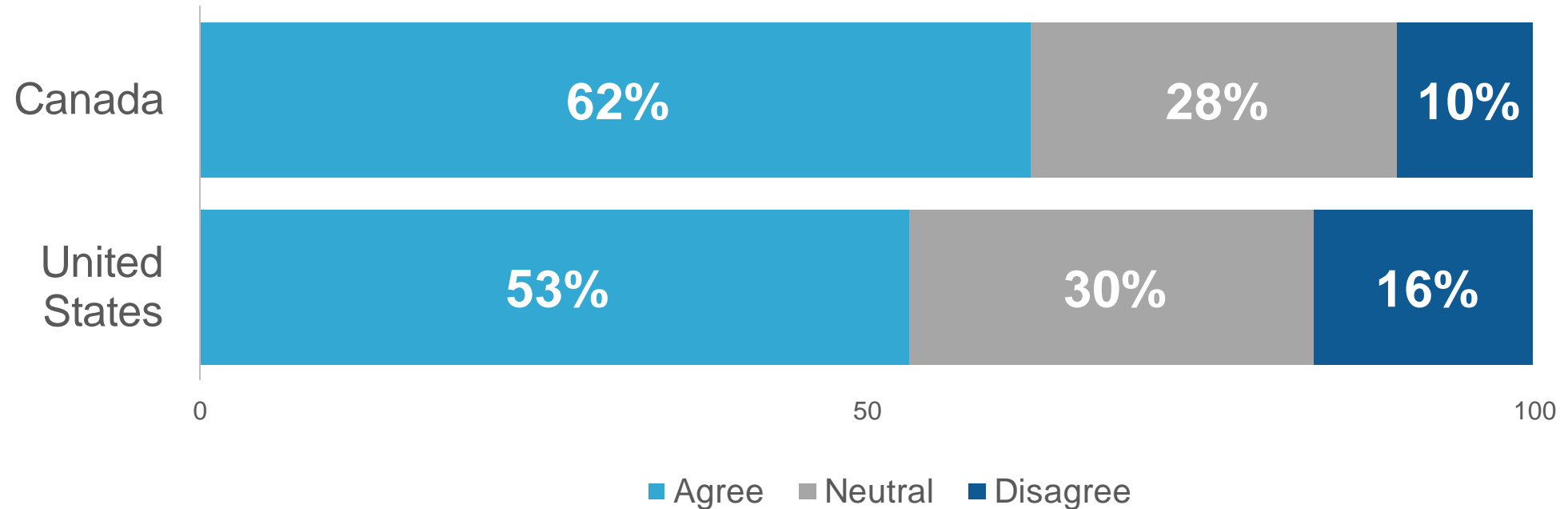
## Tourism is important to my local economy



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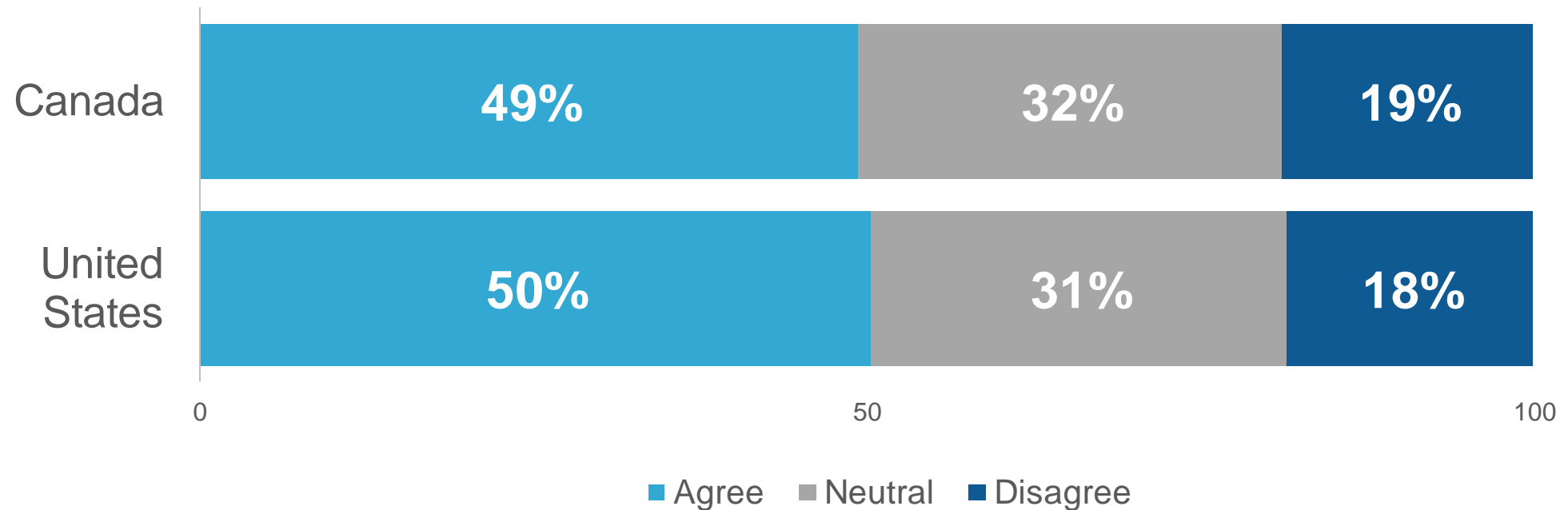


## Tourism encourages investment in our local economy

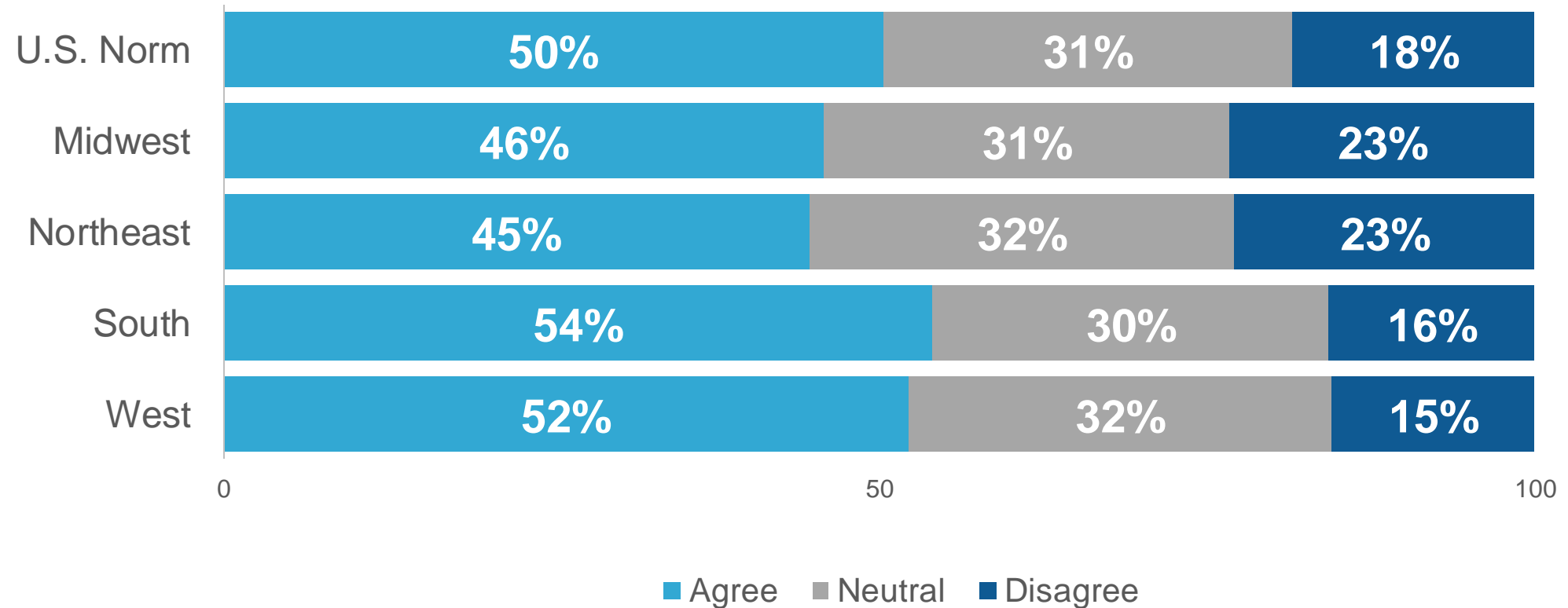




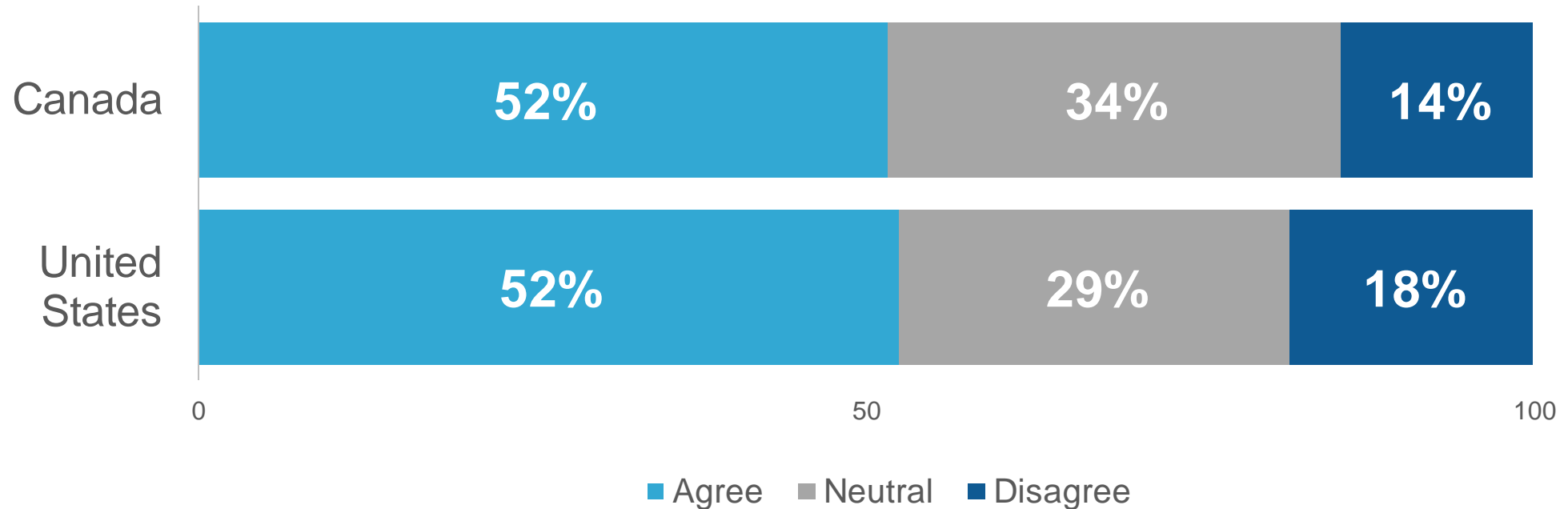
## Tourism attracts new residents to our local area



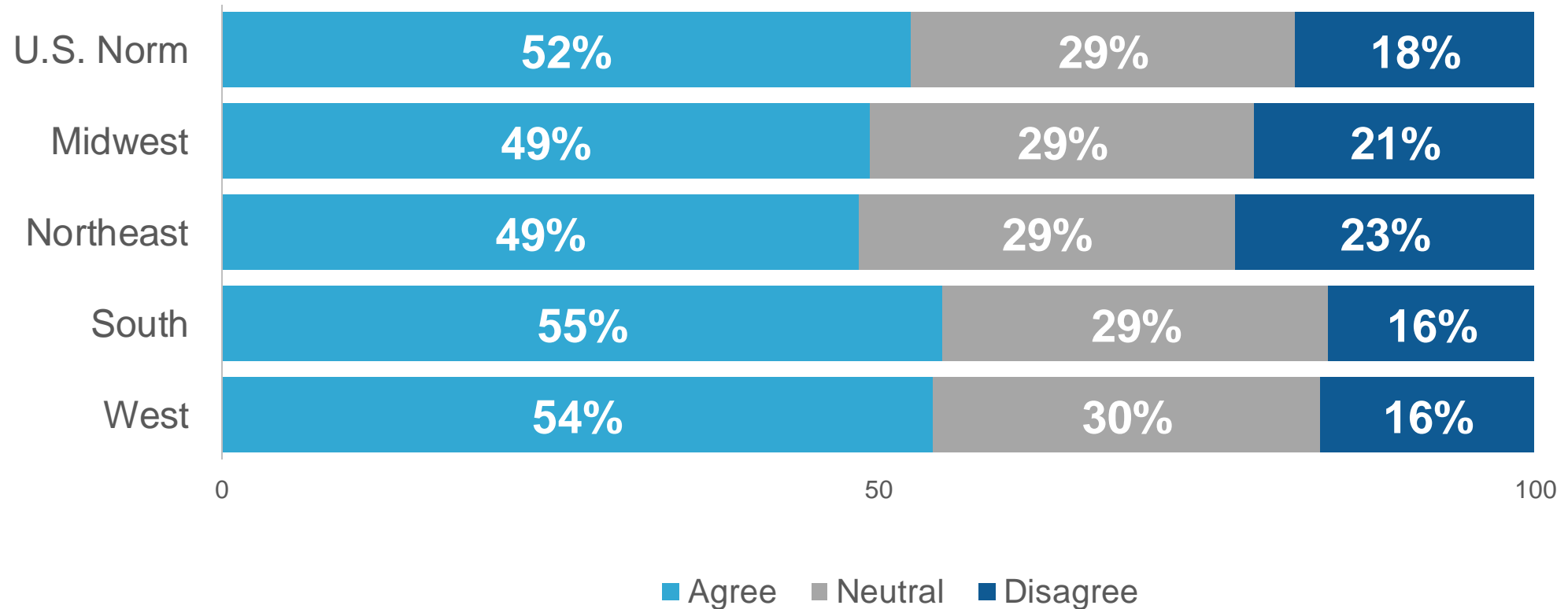
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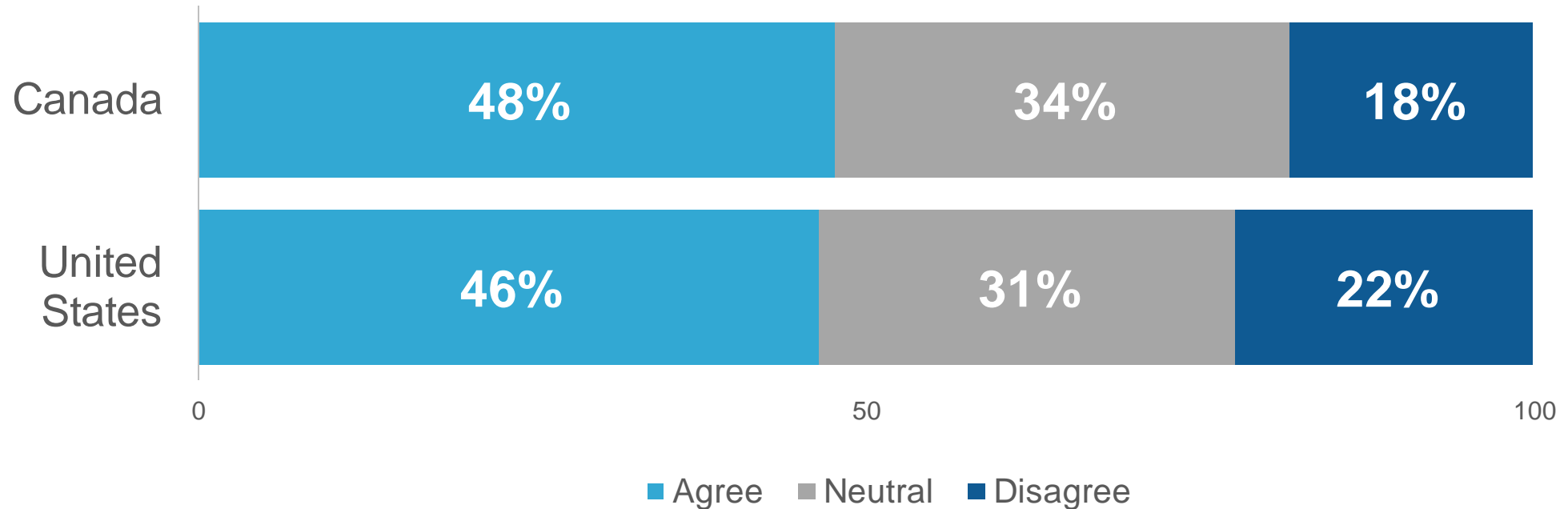
## Tourism attracts new businesses to our local area



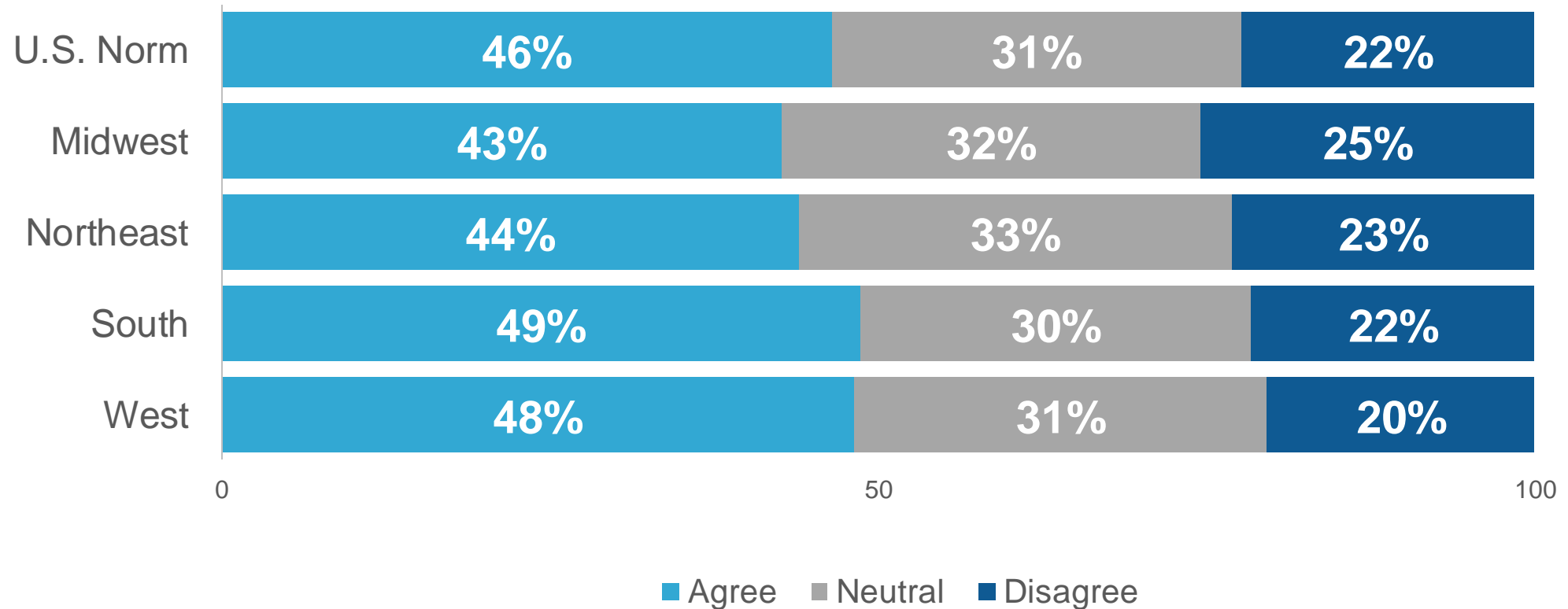
### Tourism attracts new businesses to our local area



## Tourism helps to recruit workforce to our local area



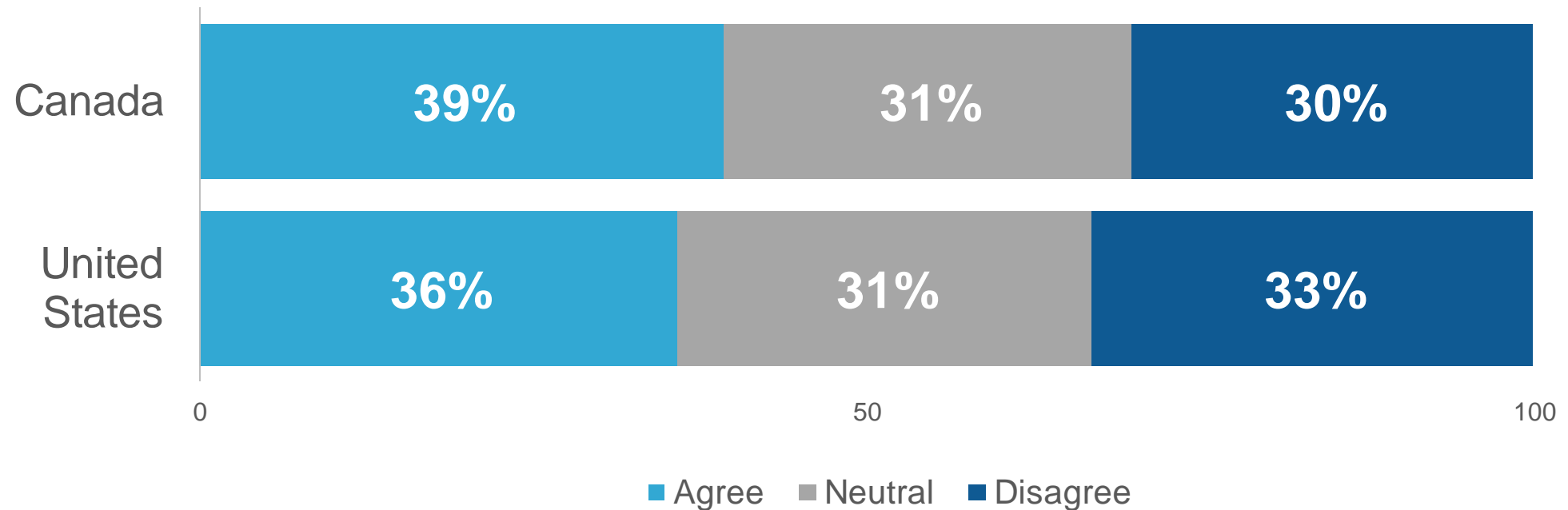
### Tourism helps to recruit workforce to our local area





# Economy

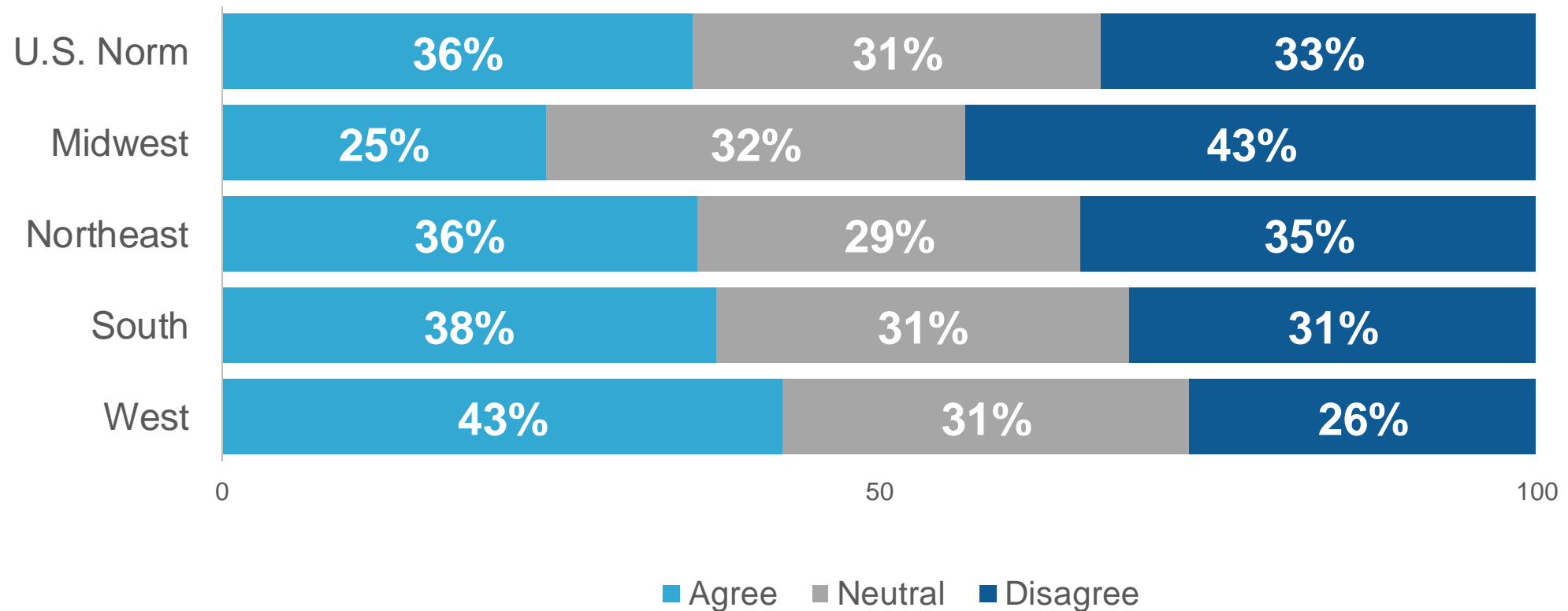
**The growth in tourism is causing prices to rise, making things less affordable for residents**



# Economy – U.S.

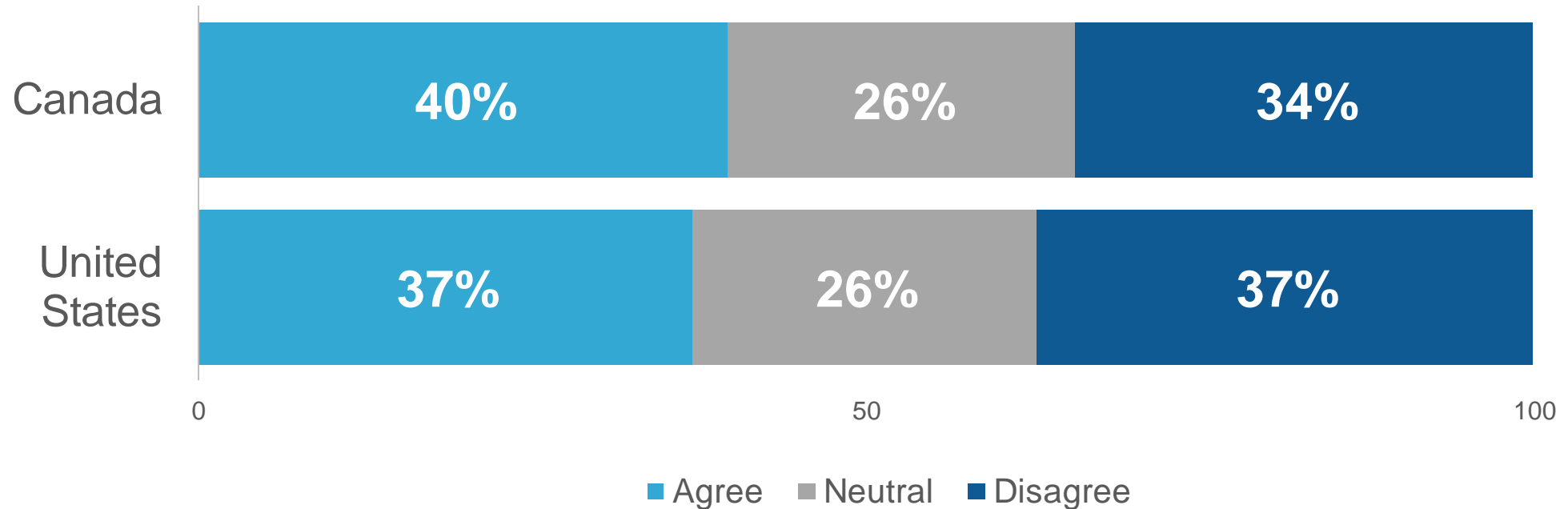
## Regional Comparisons

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

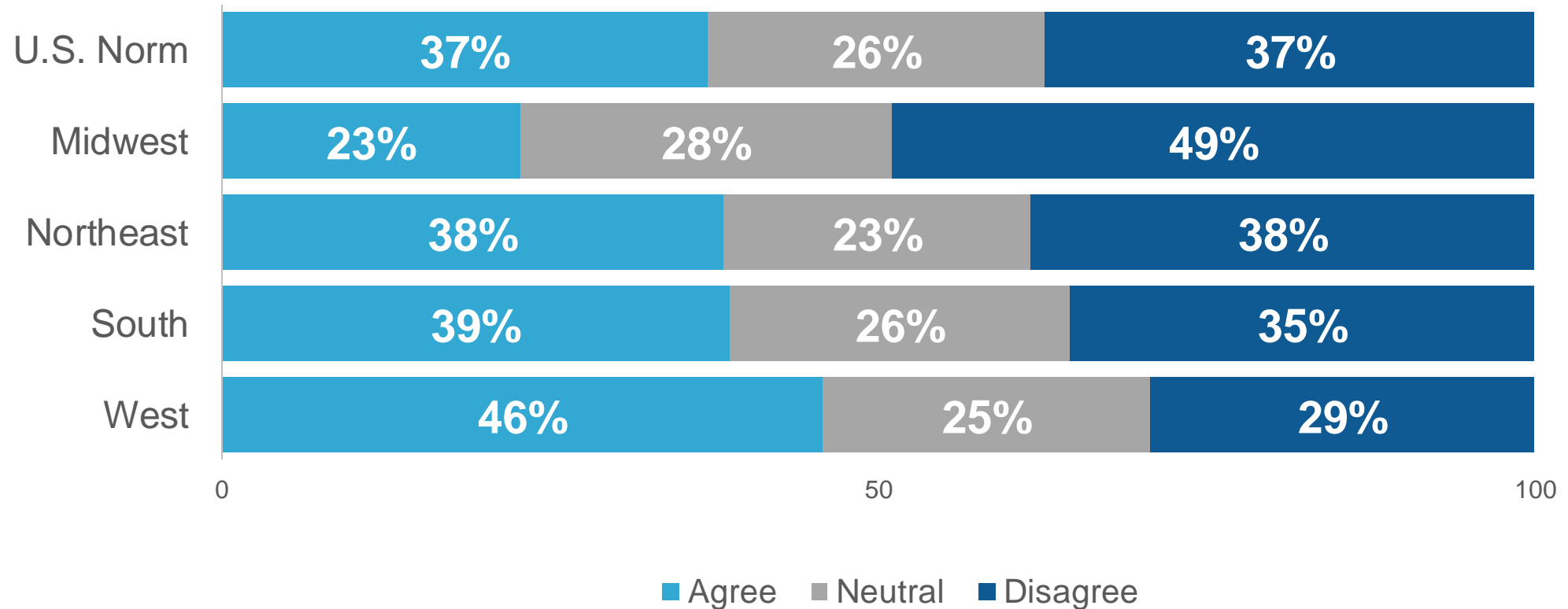


# Economy – New in 2023

## Housing is becoming less affordable in this area due to tourism



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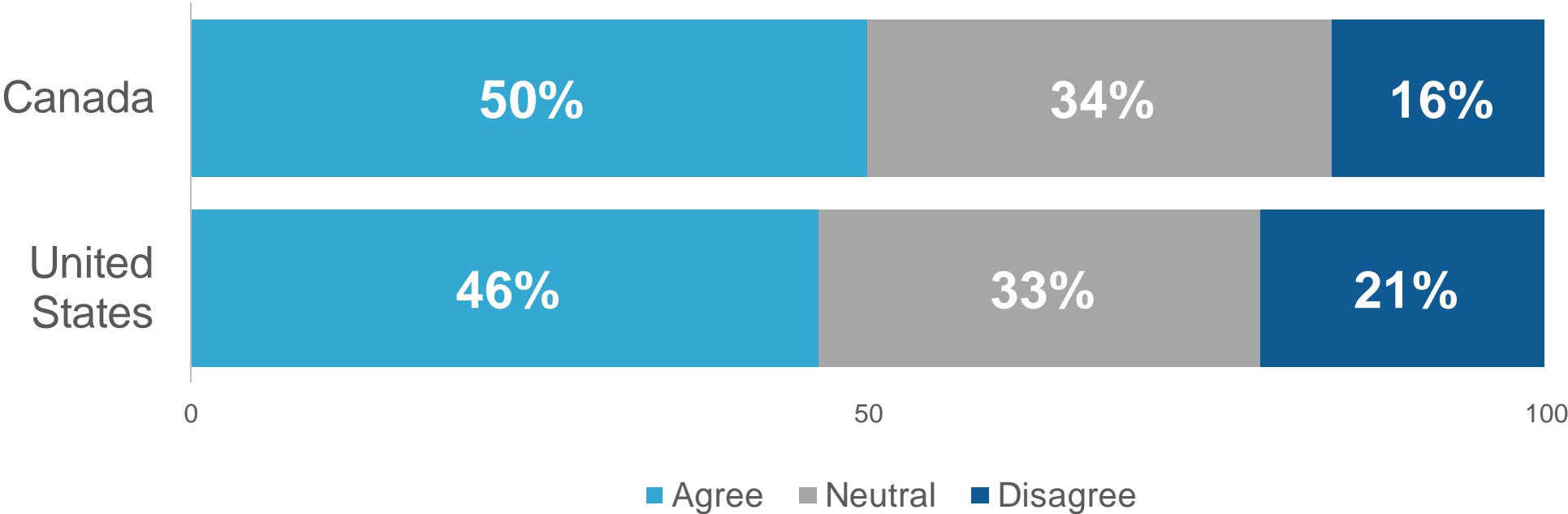


**Longwoods**  
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# Tourism Employment

# Tourism Employment

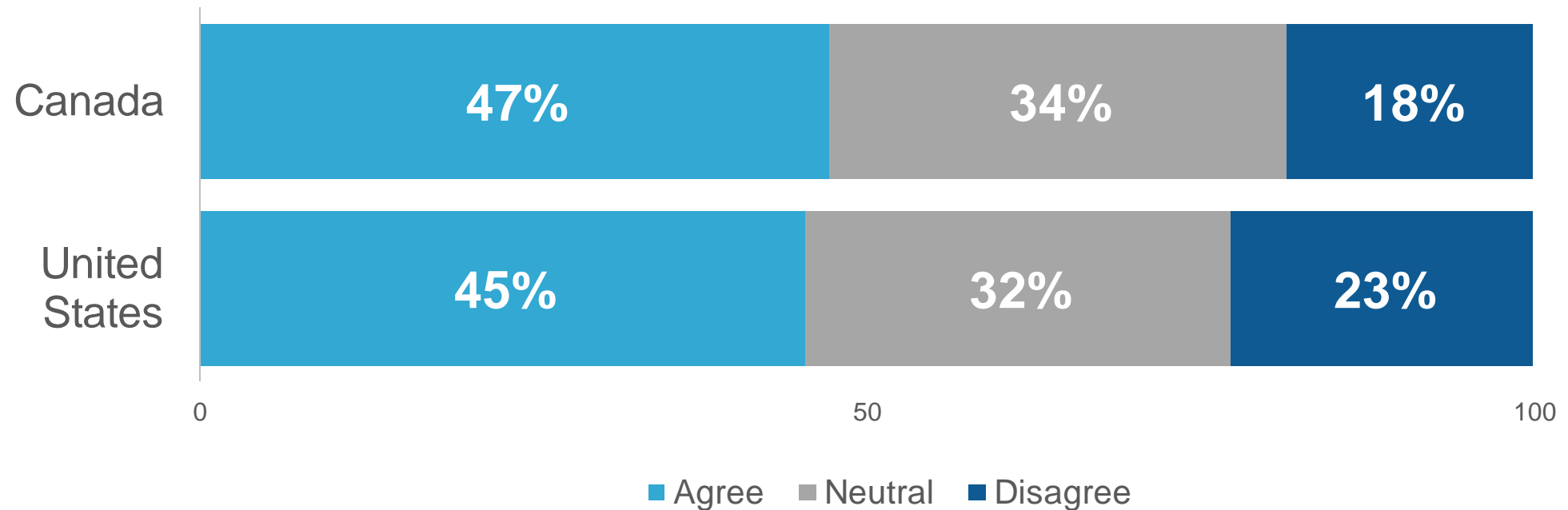
There are opportunities for career advancement in the tourism industry





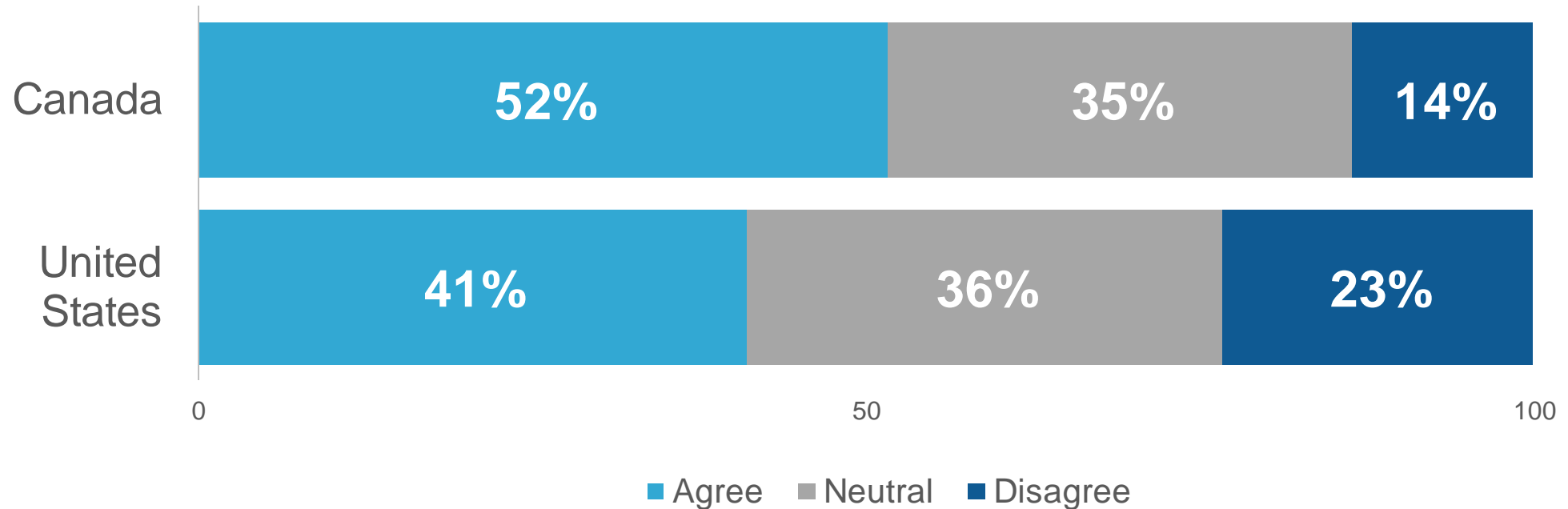
# Tourism Employment

**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**

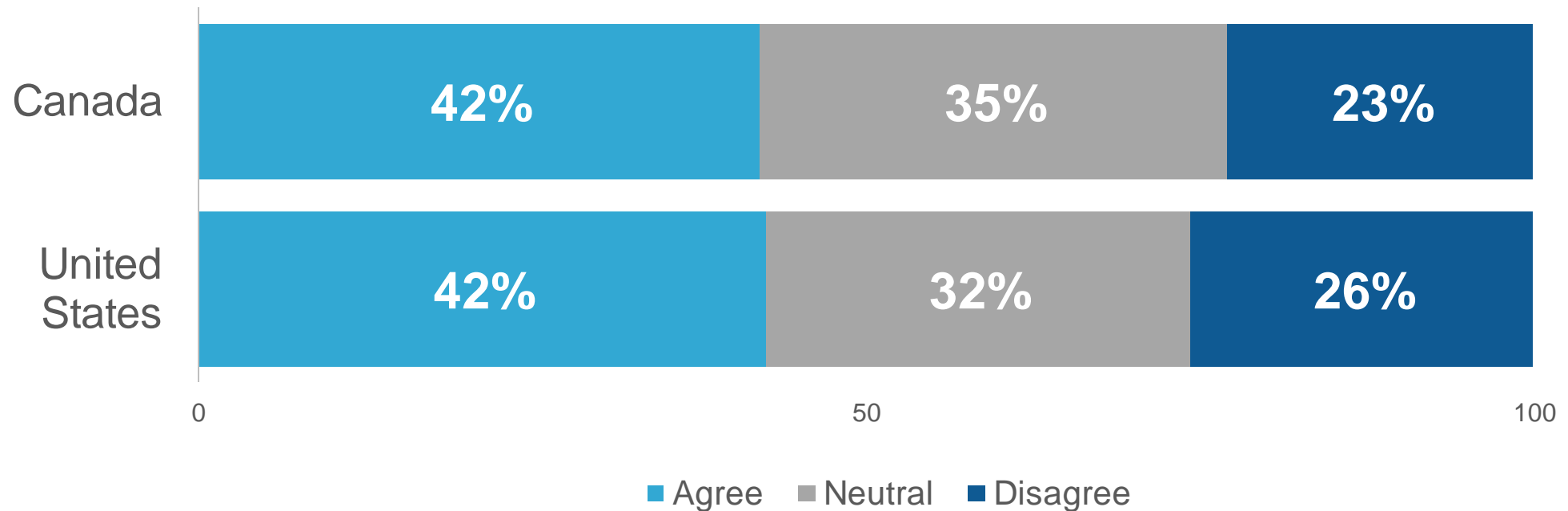




## Quality of Life

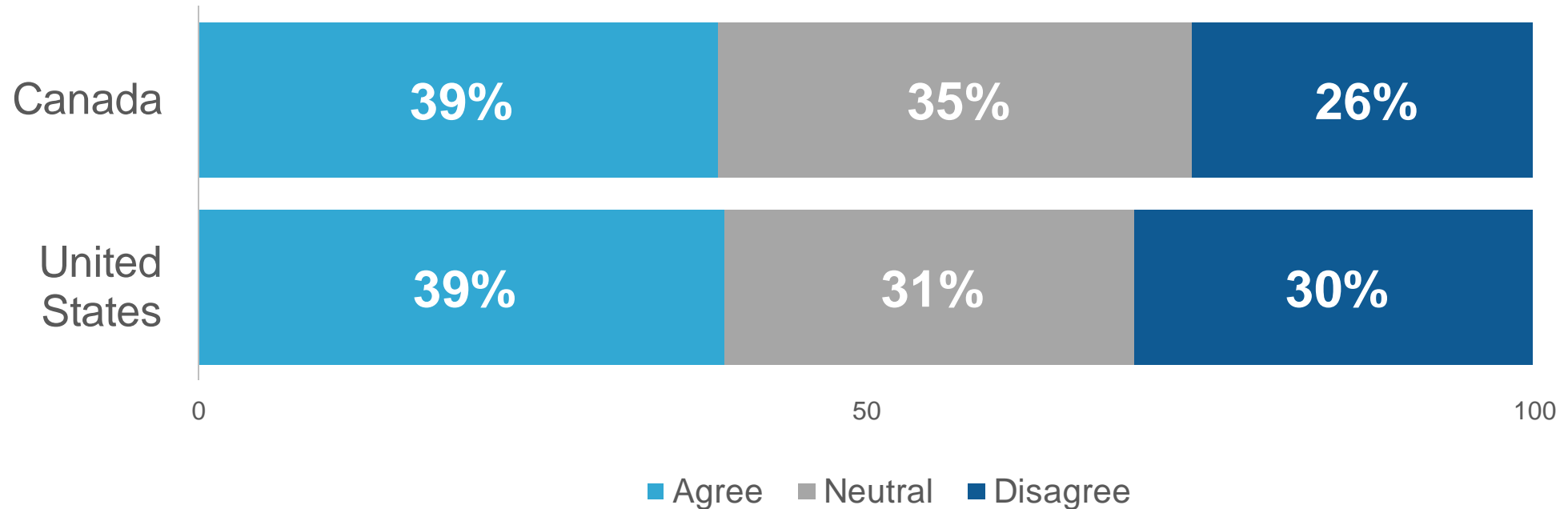
# Quality of Life

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



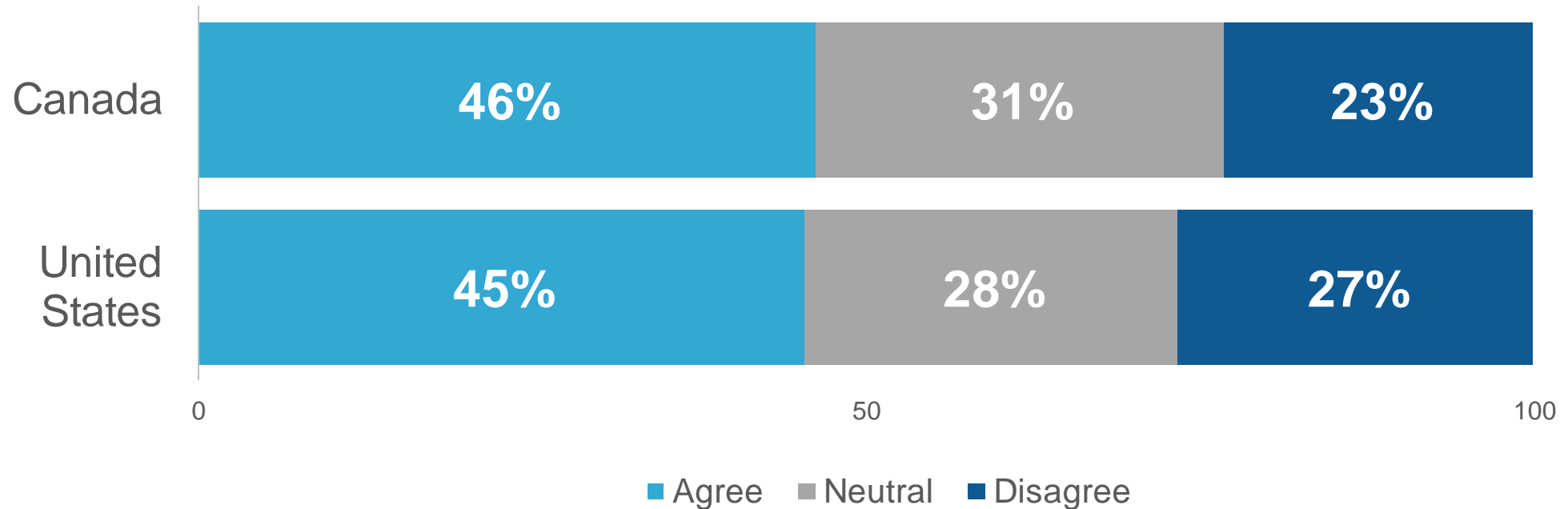
# Quality of Life

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



# Quality of Life

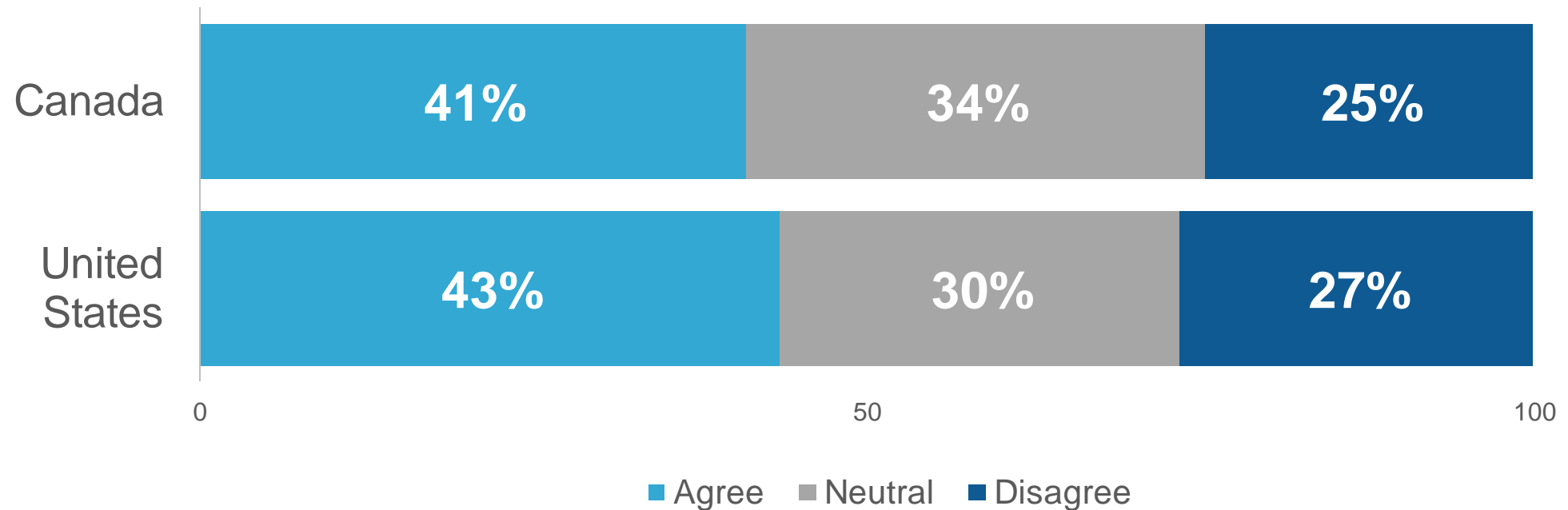
**I have more recreational opportunities (places to go and things to do) because of tourism in this area**





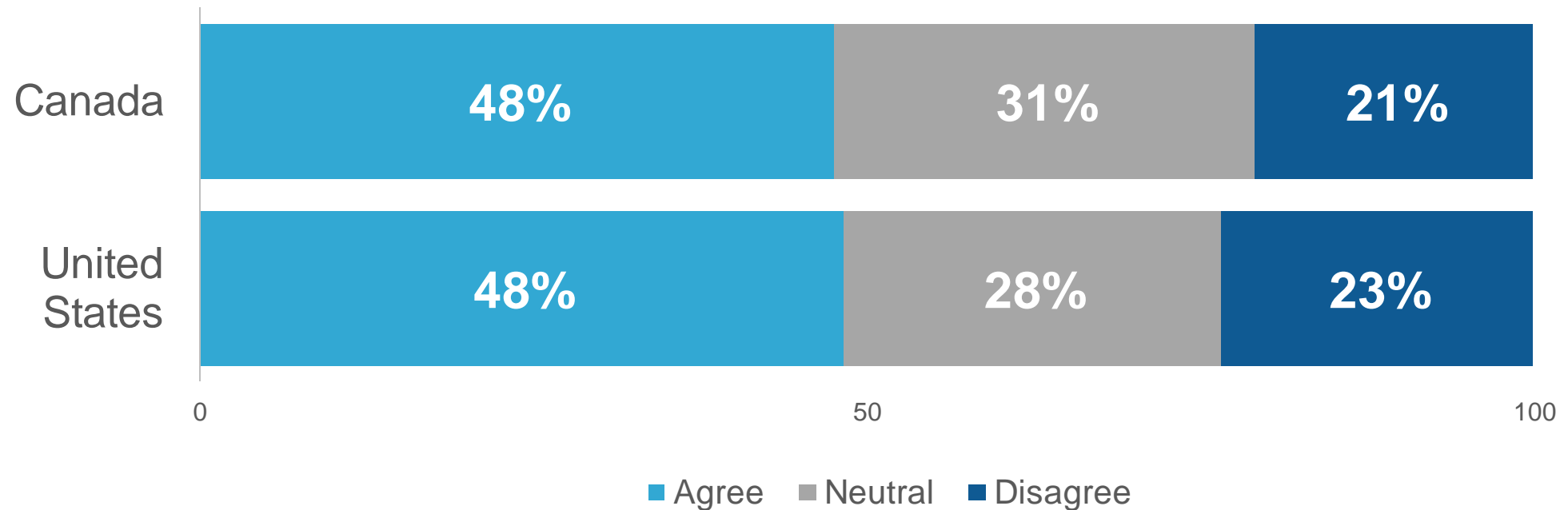
# Quality of Life

## Shopping opportunities are better here as a result of tourism



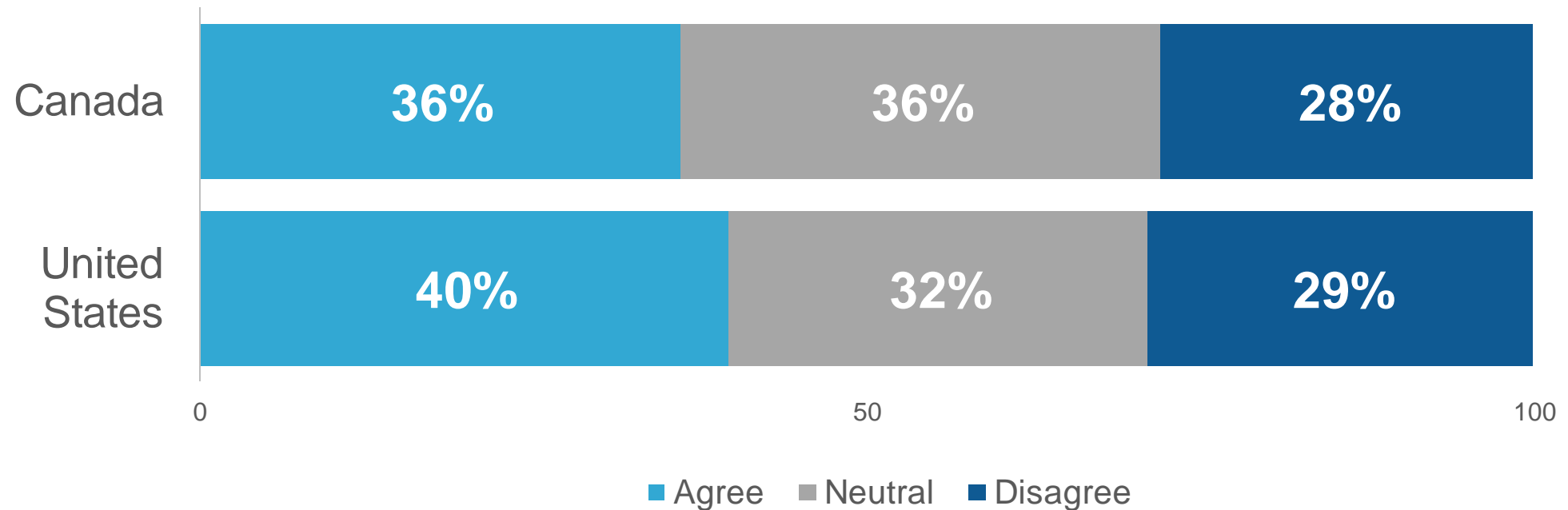
# Quality of Life – New in 2023

## Dining opportunities are better here as a result of tourism



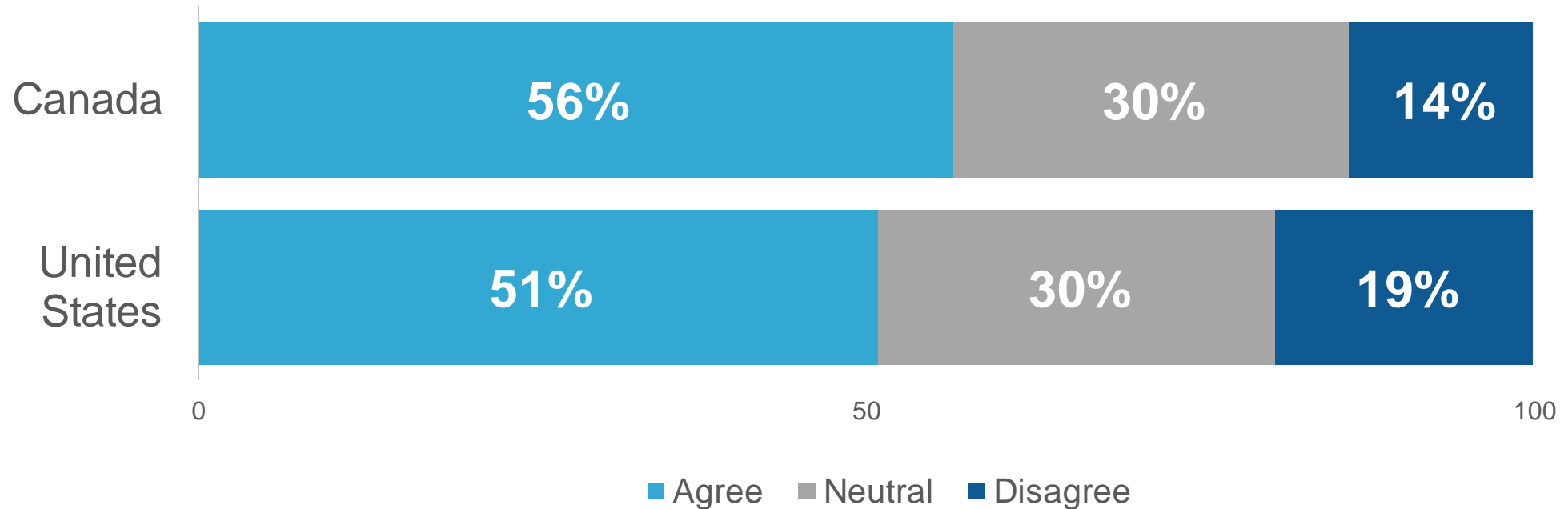
# Quality of Life

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

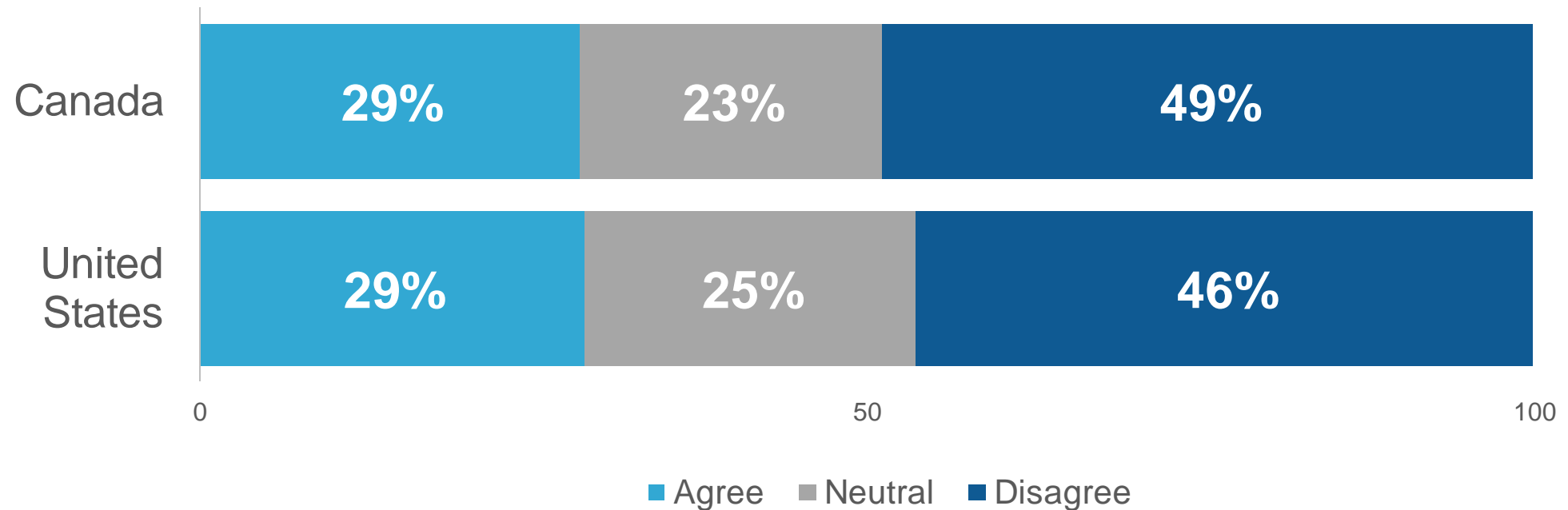


# Quality of Life

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

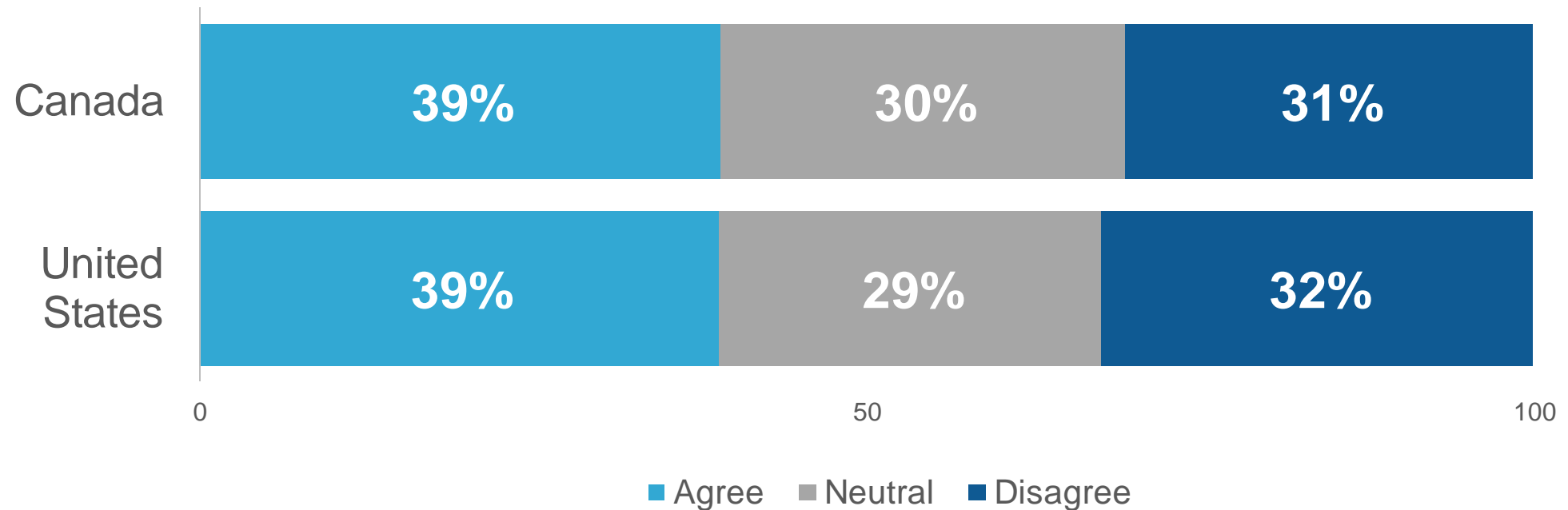


## Uncontrolled tourism growth is jeopardizing our heritage and culture



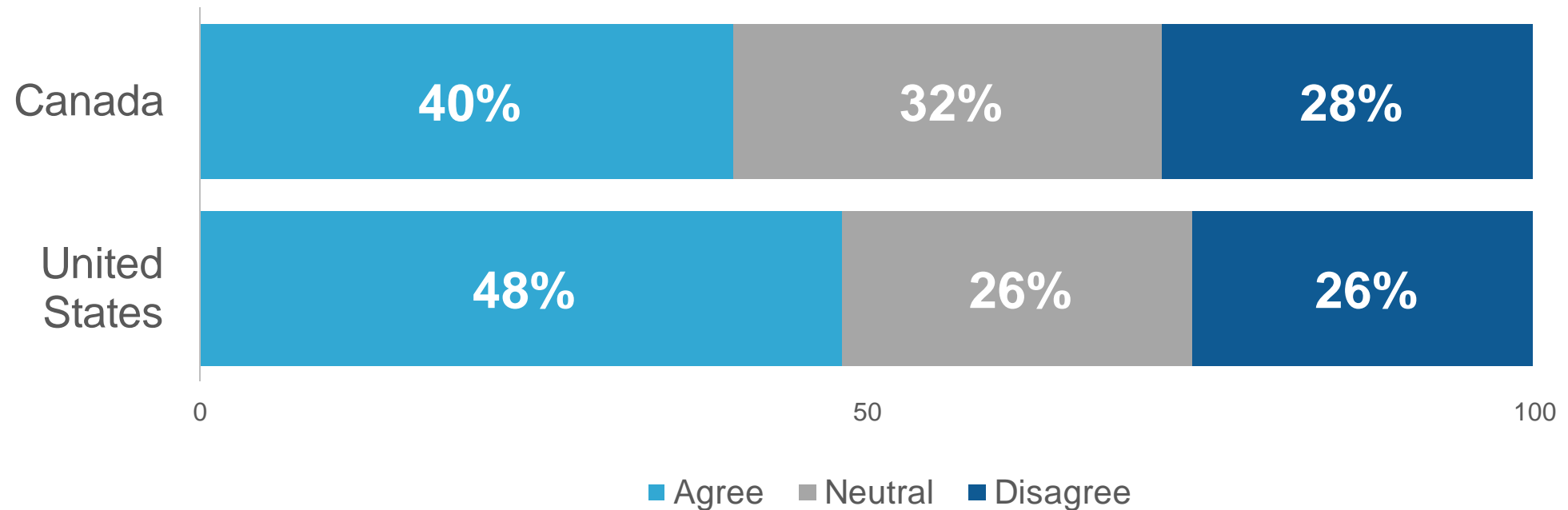
# Quality of Life

**Attractions and leisure facilities are becoming overcrowded because of more tourists**



# Quality of Life

## Tourists add to traffic congestion and parking problems here

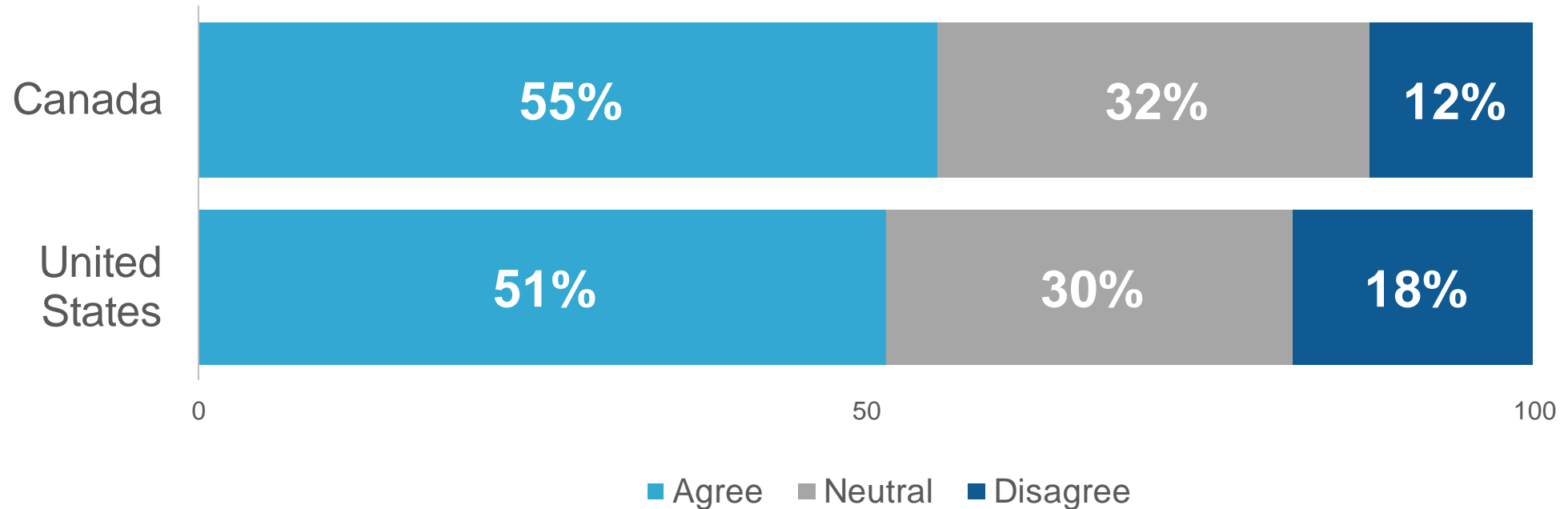




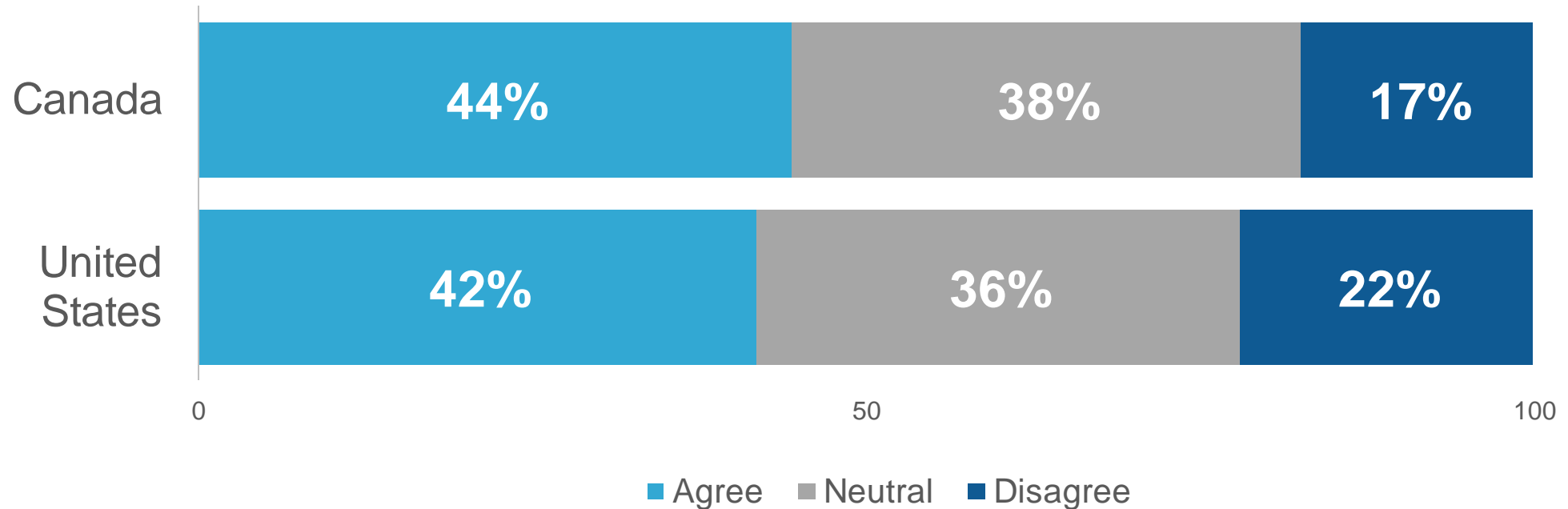


# Environment

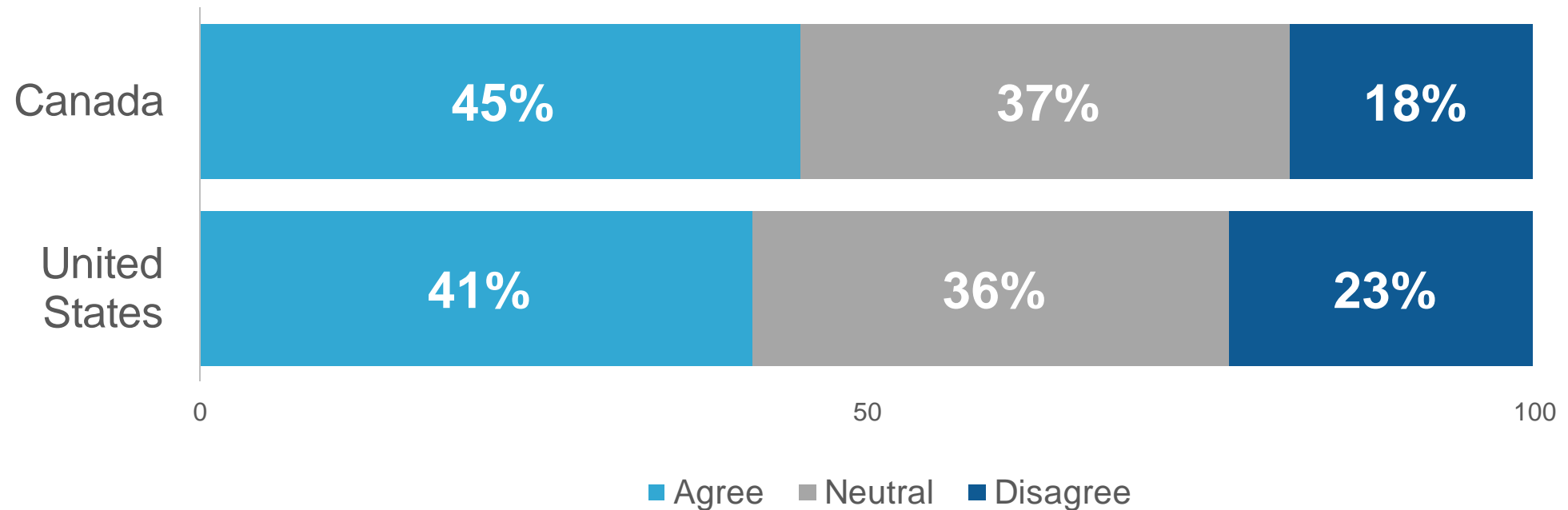
## Long-term planning can limit environmental impacts caused by tourism



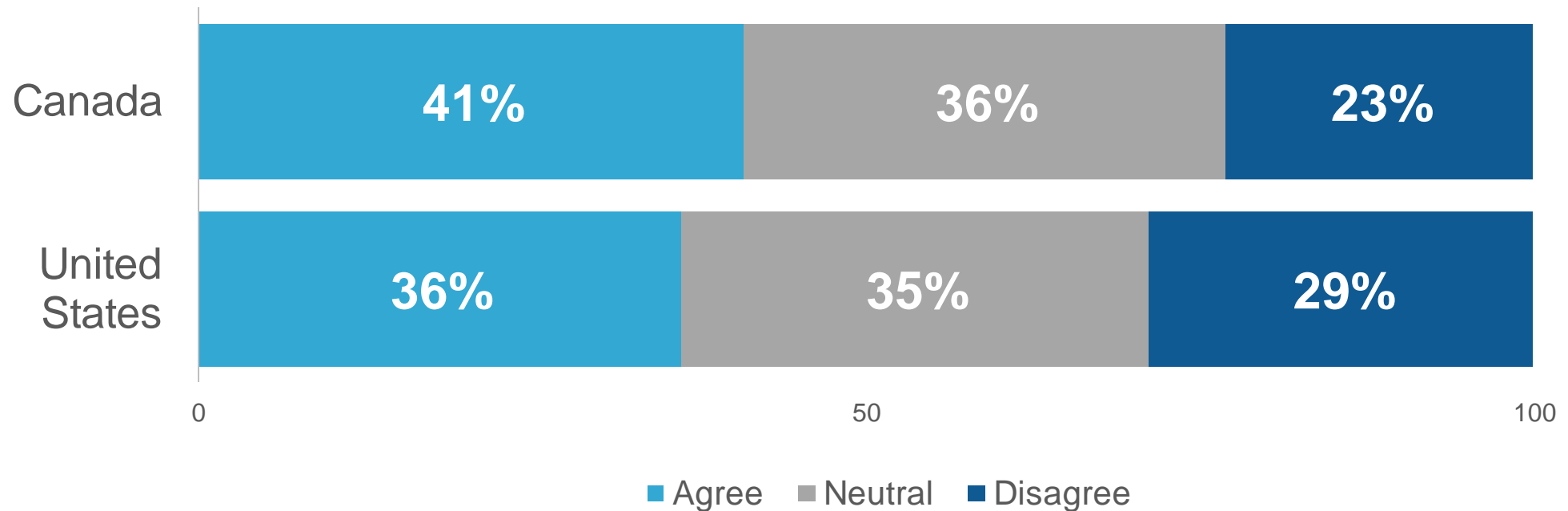
## Tourism is a good alternative to more environmentally-damaging development



**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



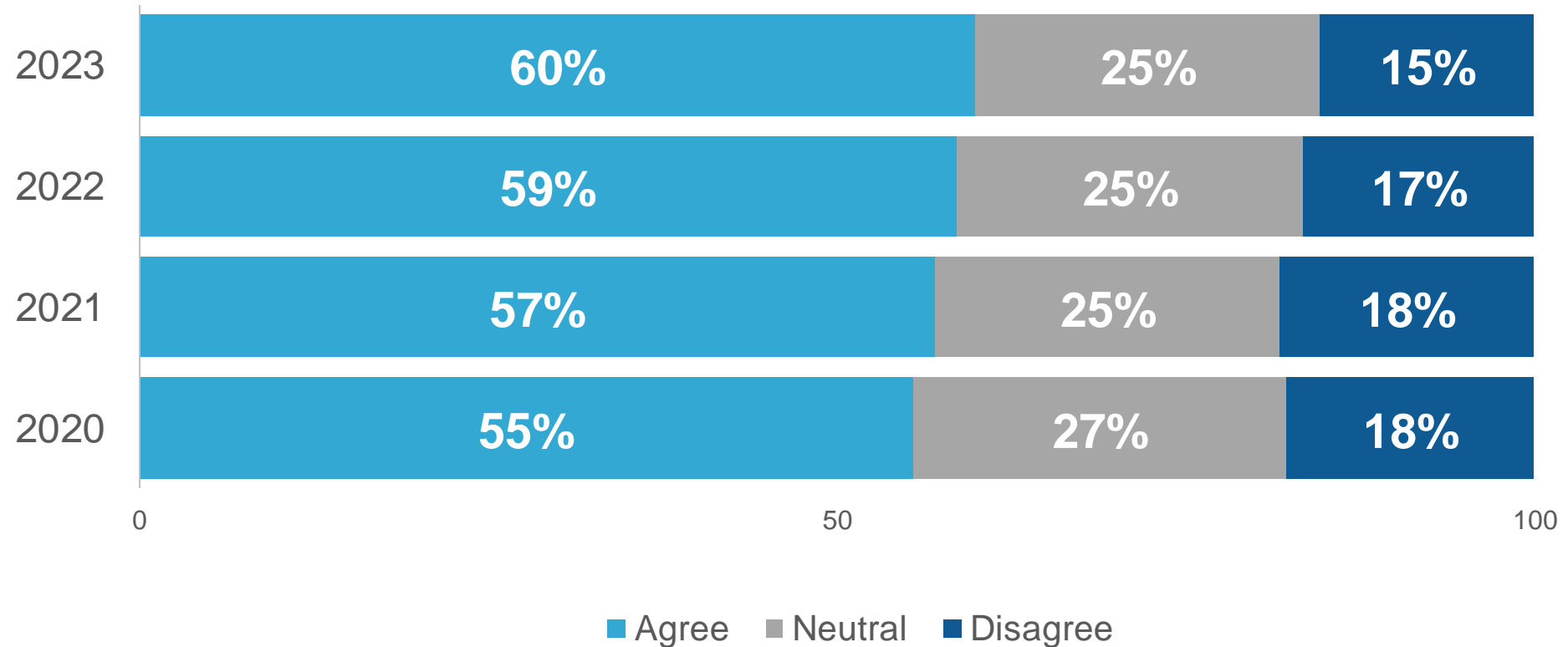




**What's going well?**

# Overall Sentiment About Tourism – U.S.

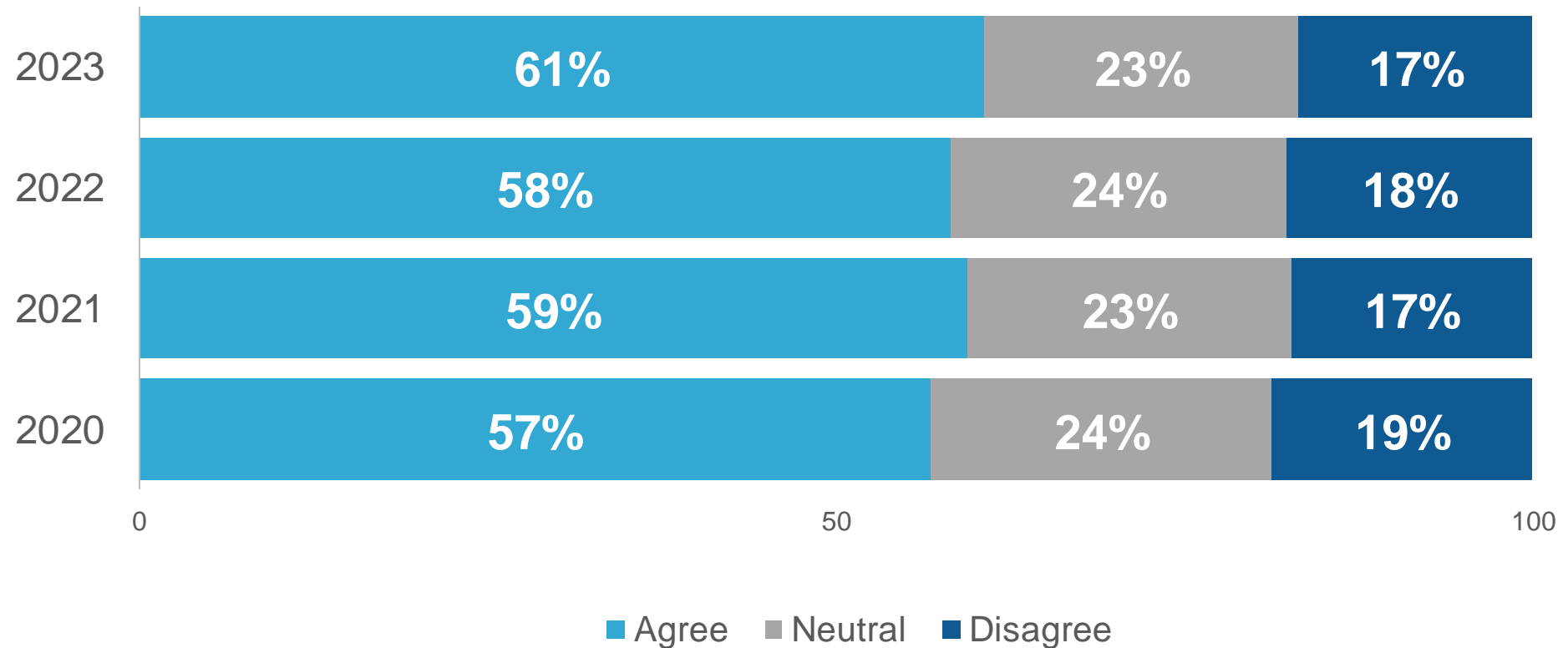
**In general, the positive benefits of tourism outweigh the negative impacts**





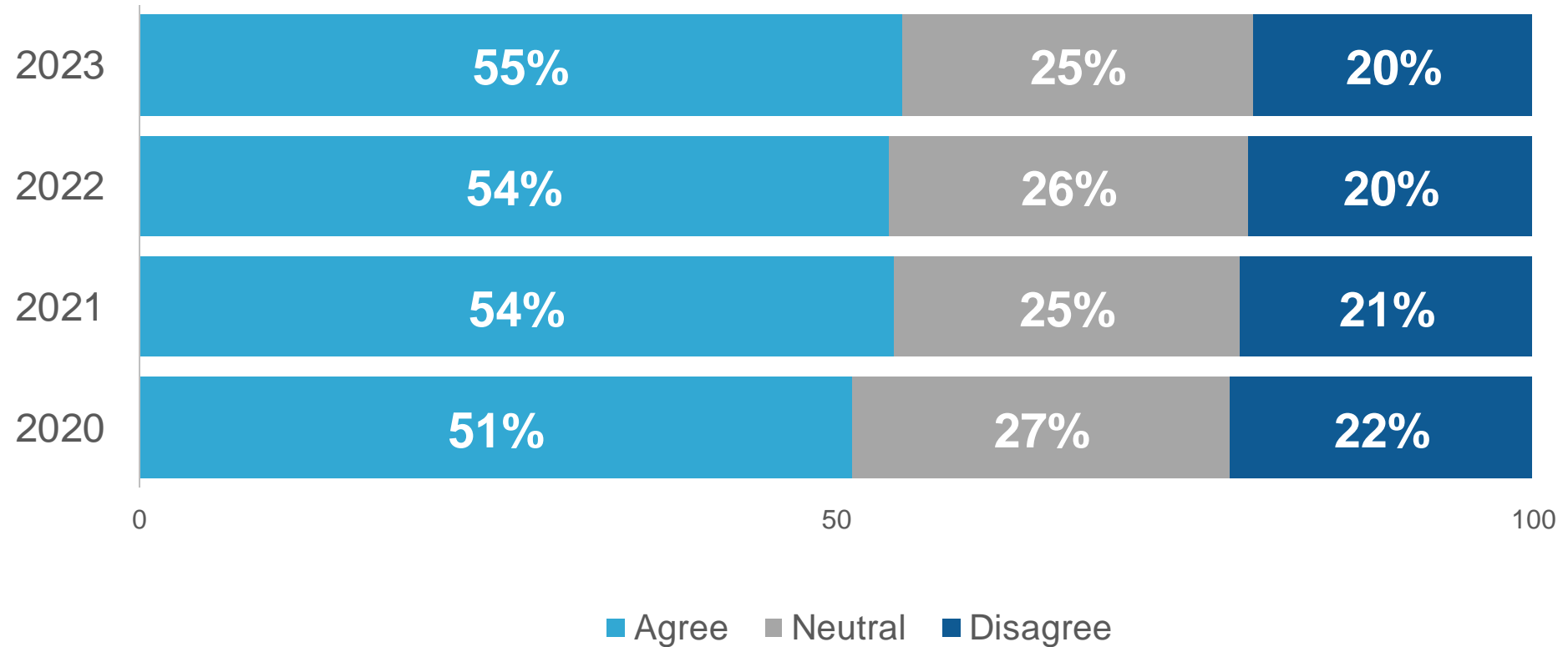
# Overall Sentiment About Tourism – U.S.

Overall, I think tourism is good for my local area



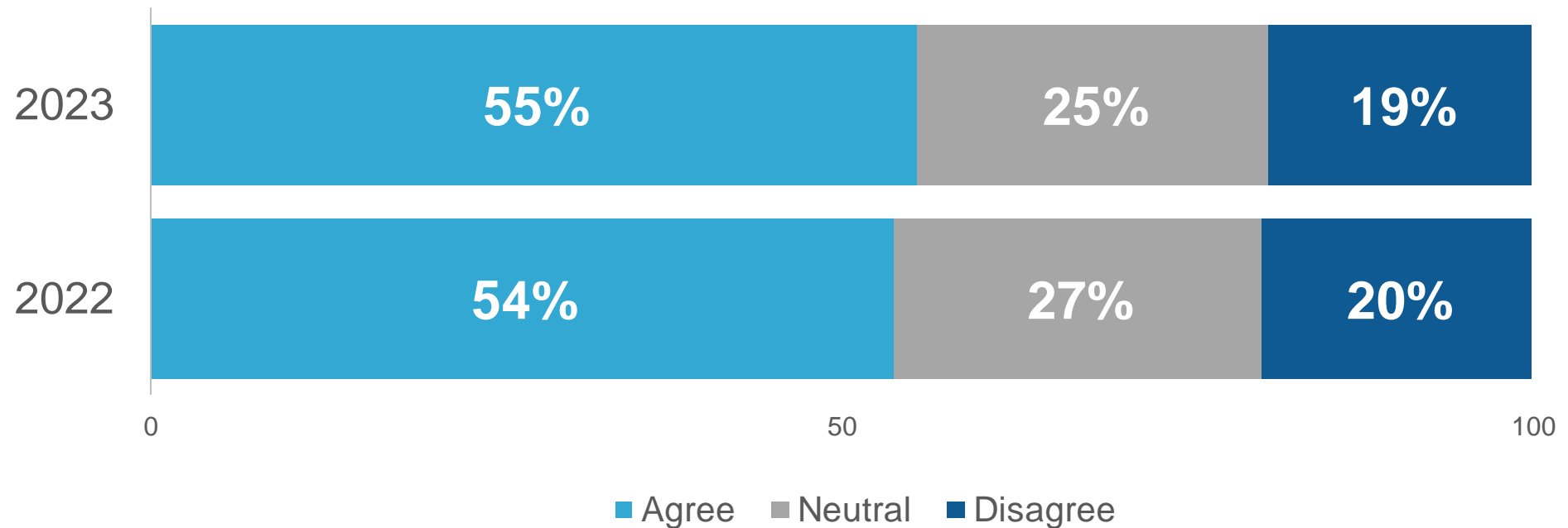
# Overall Sentiment About Tourism – U.S.

**I want tourism to be important in my local area**



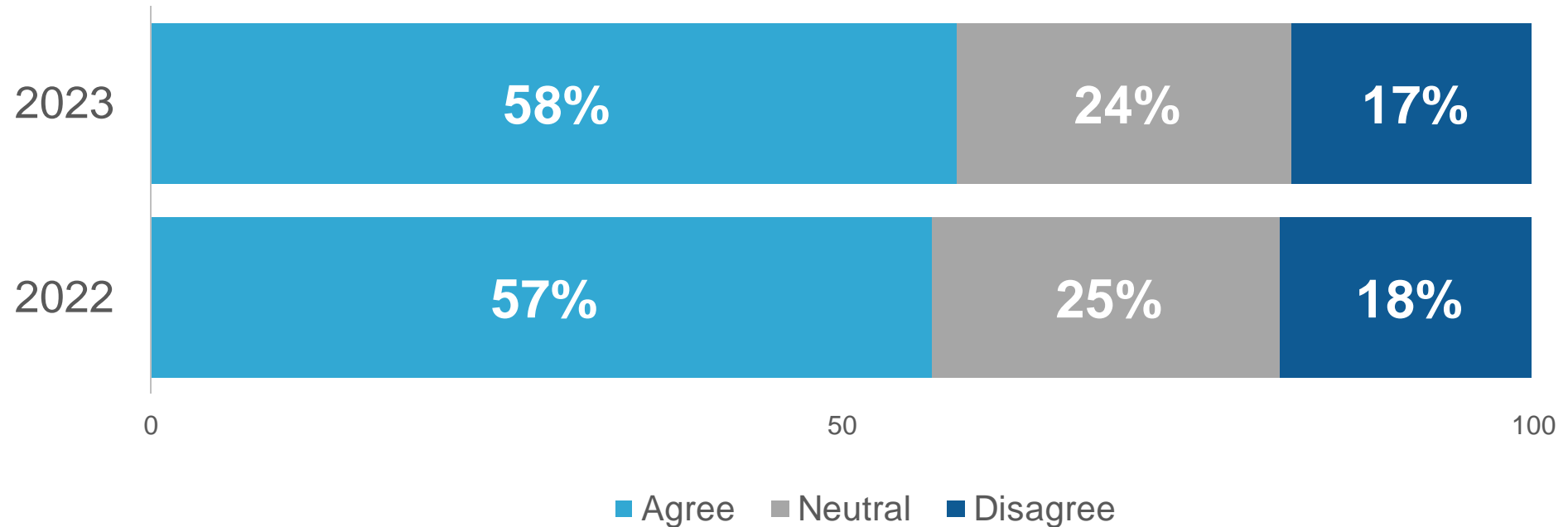
# Overall Sentiment About Tourism – U.S.

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



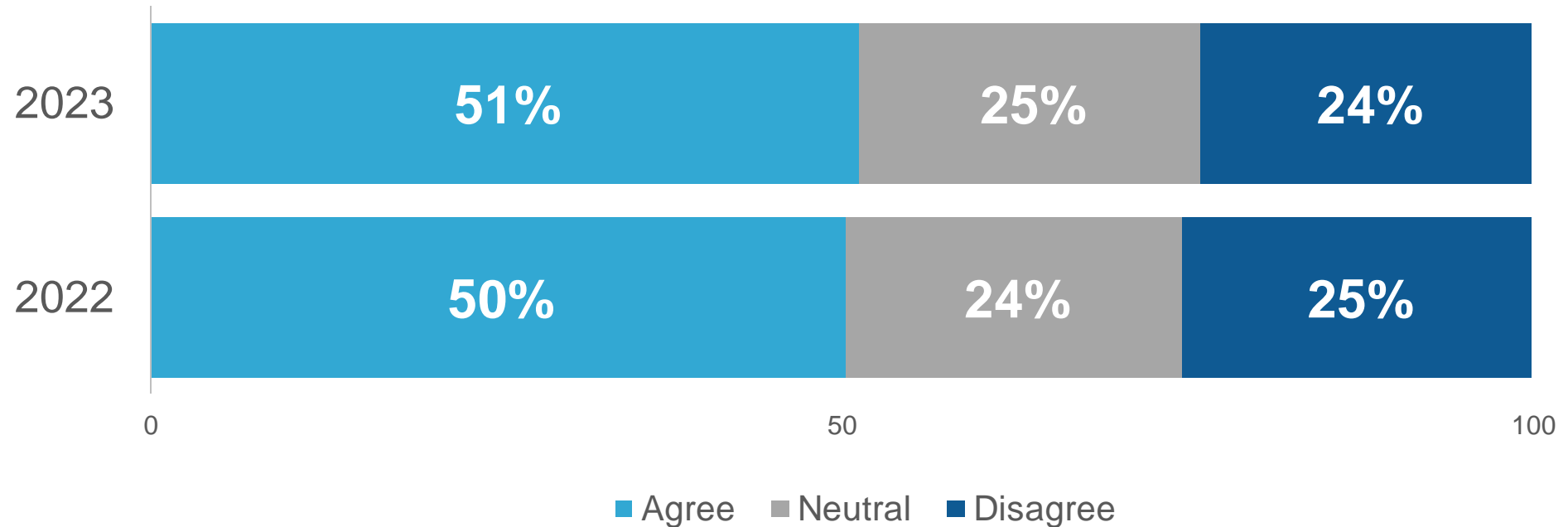
# Overall Sentiment About Tourism – U.S.

**I want to see tourism thrive in my local area**



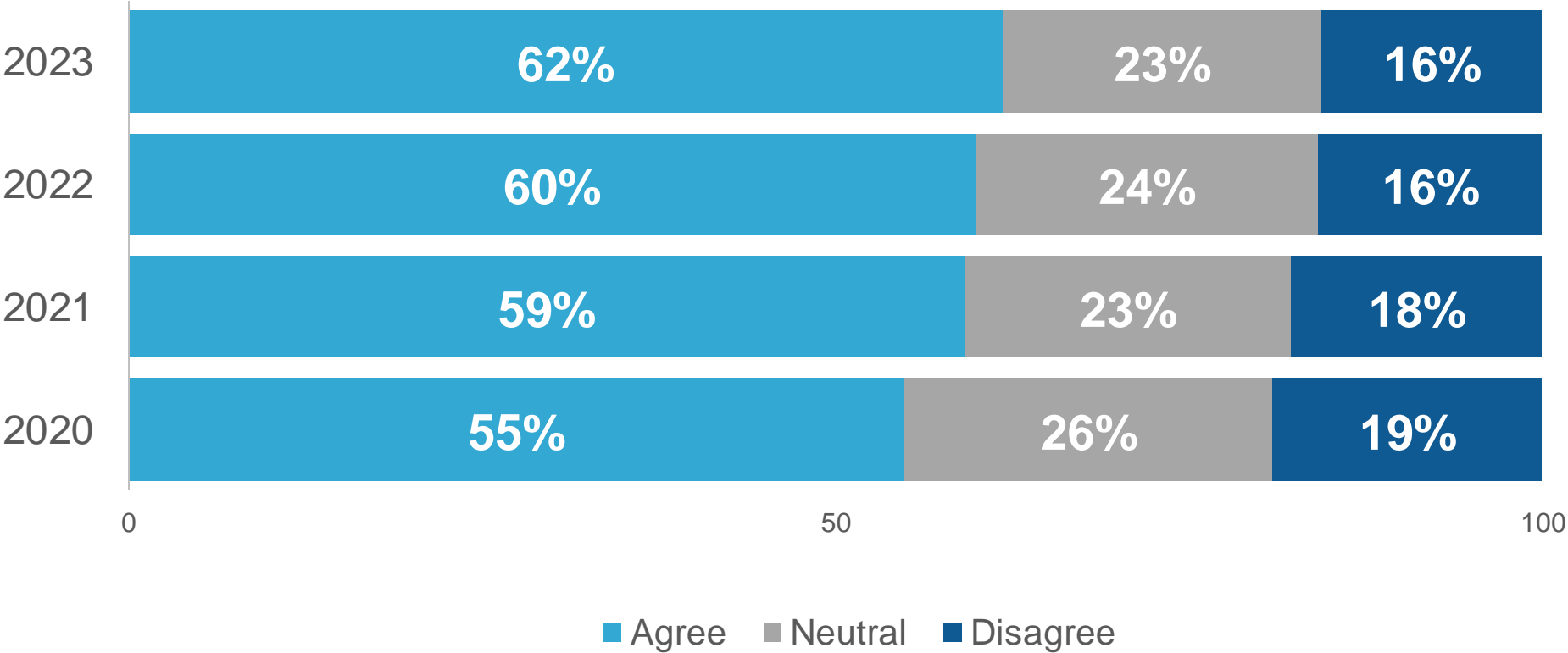
# Overall Sentiment About Tourism – U.S.

My local area benefits from a strong tourism industry



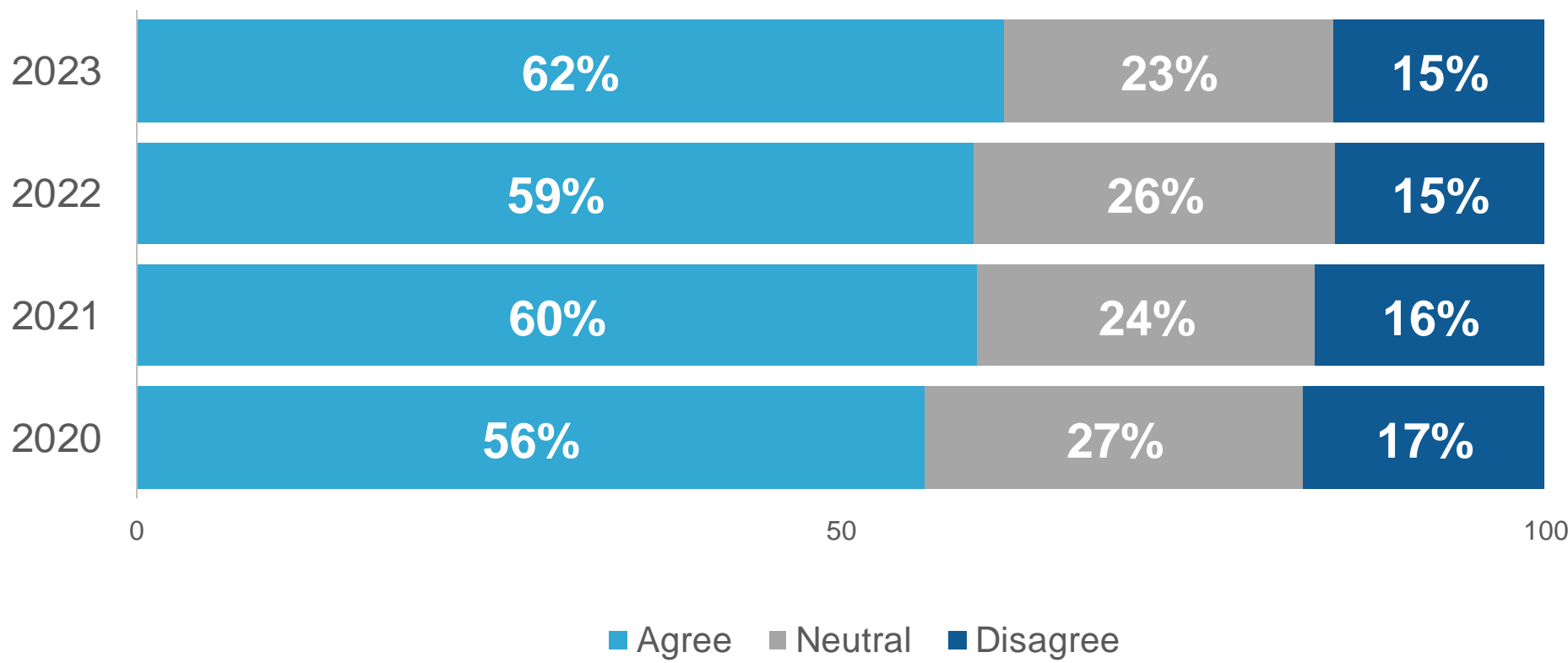
# Tourism Development and Growth – U.S.

I believe tourism should be encouraged here



# Tourism Development and Growth – U.S.

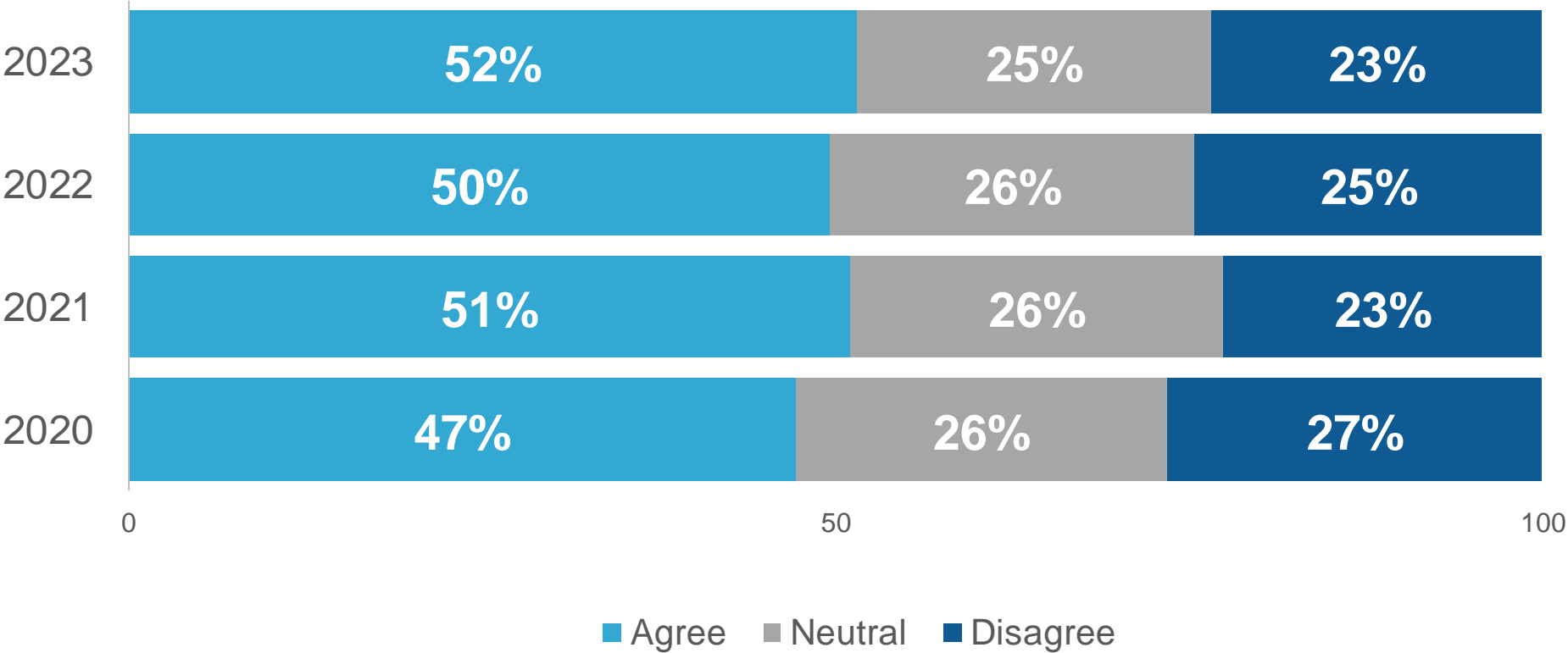
## I support tourism growth





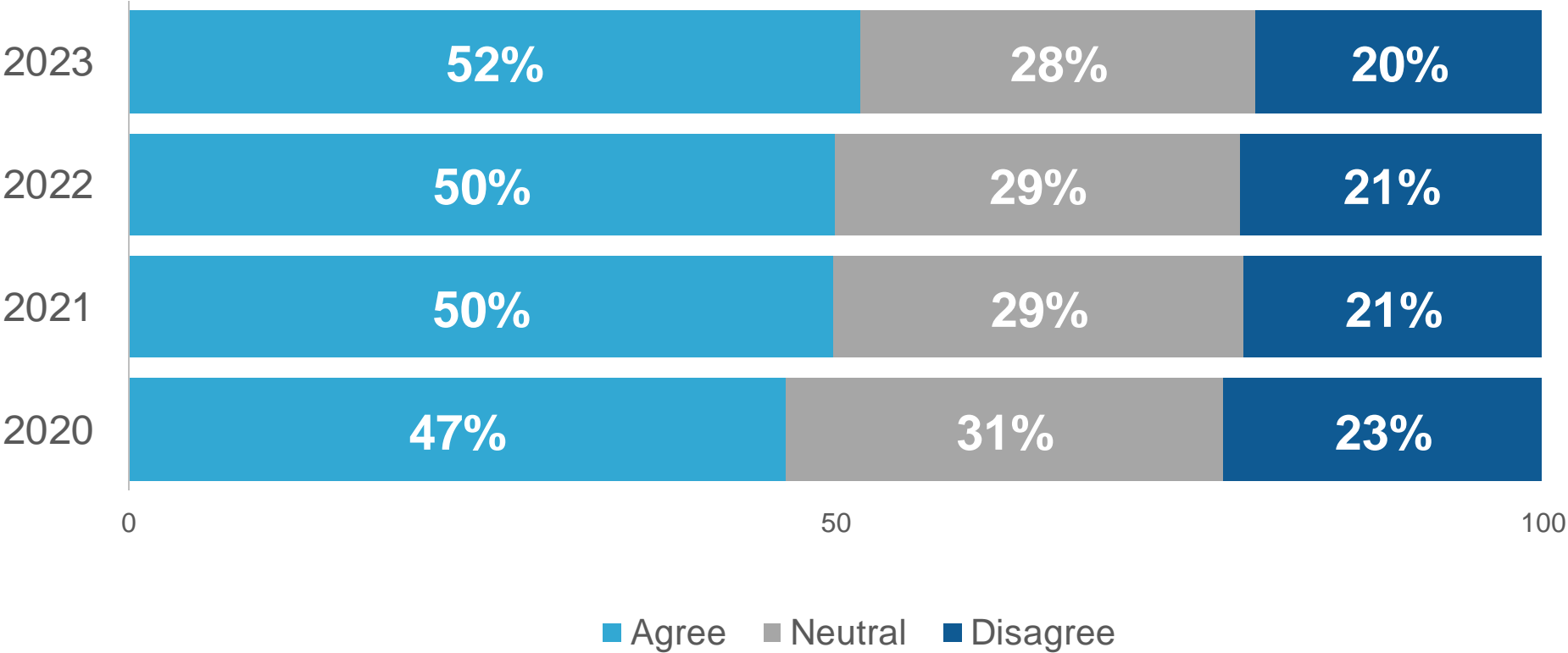
# Tourism Development and Growth – U.S.

I would like to see more tourists coming to my area



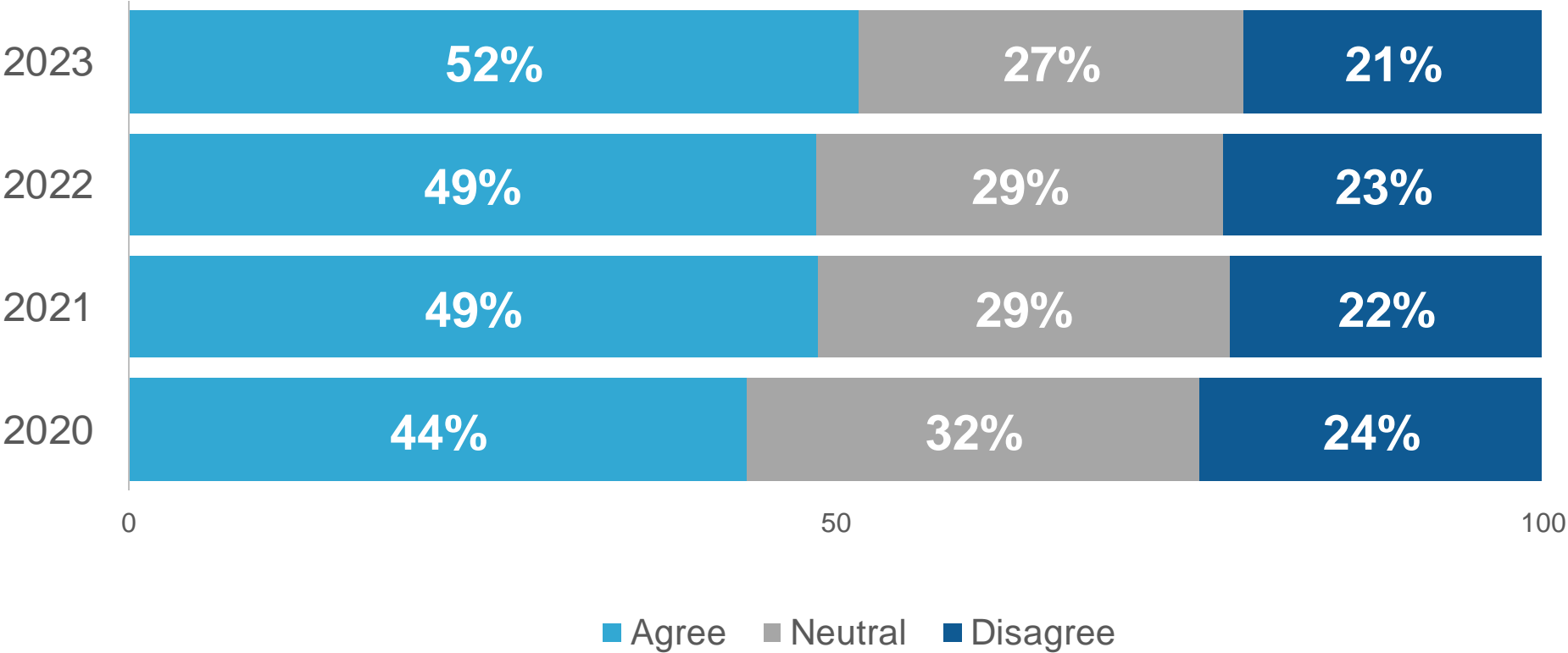
# Tourism Development and Growth – U.S.

**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**

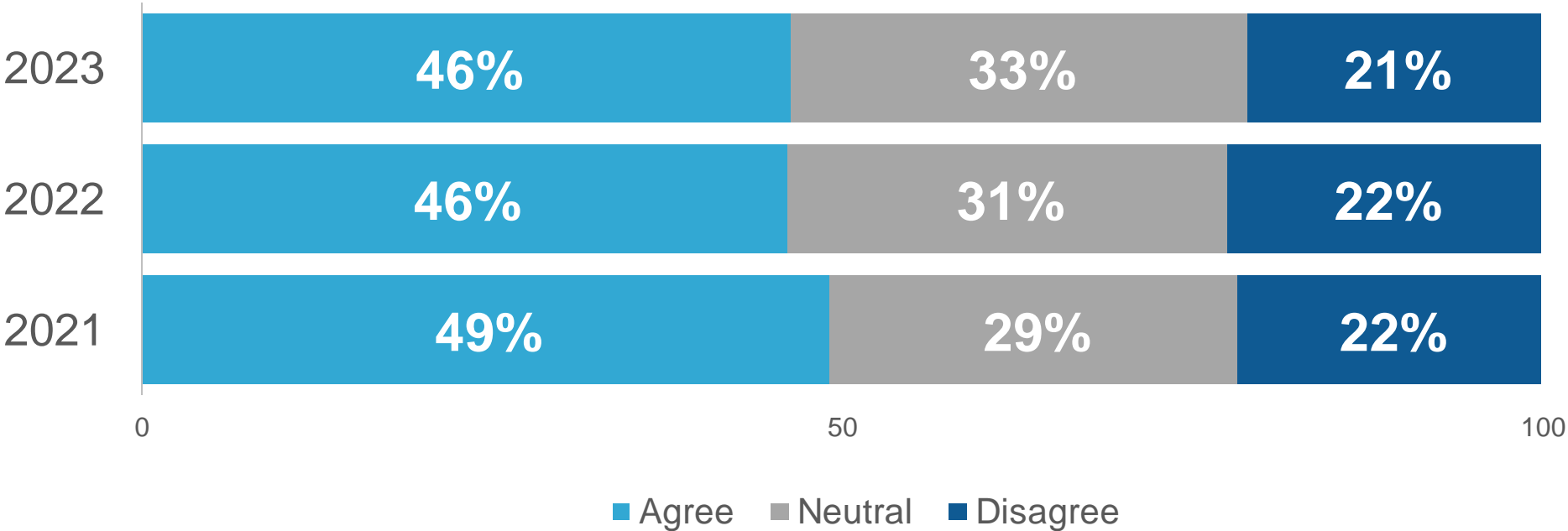




**What do we need to  
improve?**

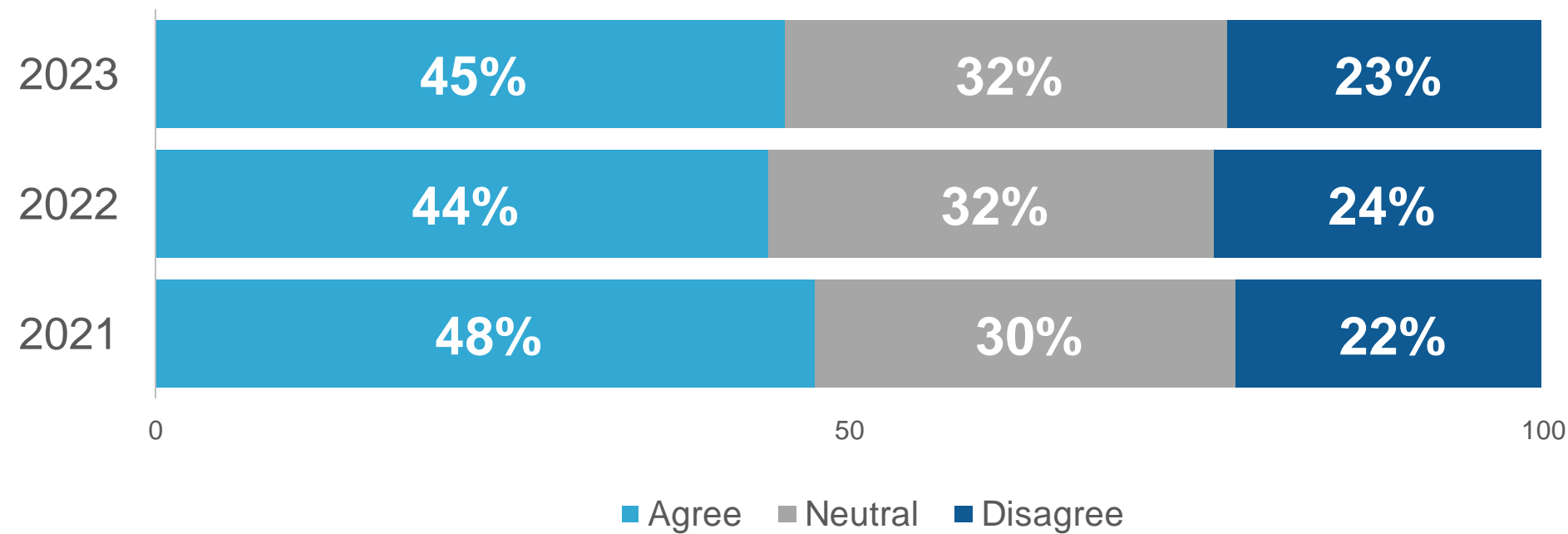
# Tourism Employment – U.S.

**There are opportunities for career advancement in the tourism industry**



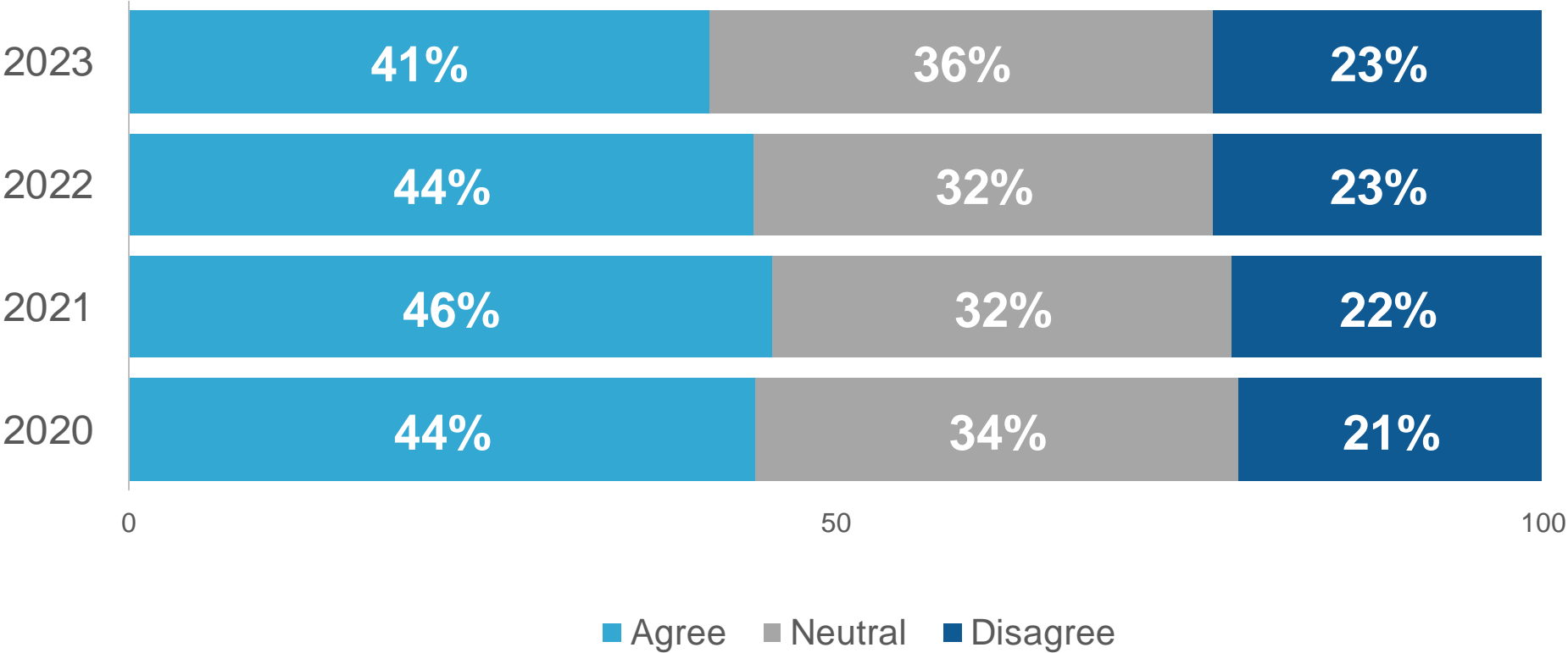
# Tourism Employment – U.S.

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



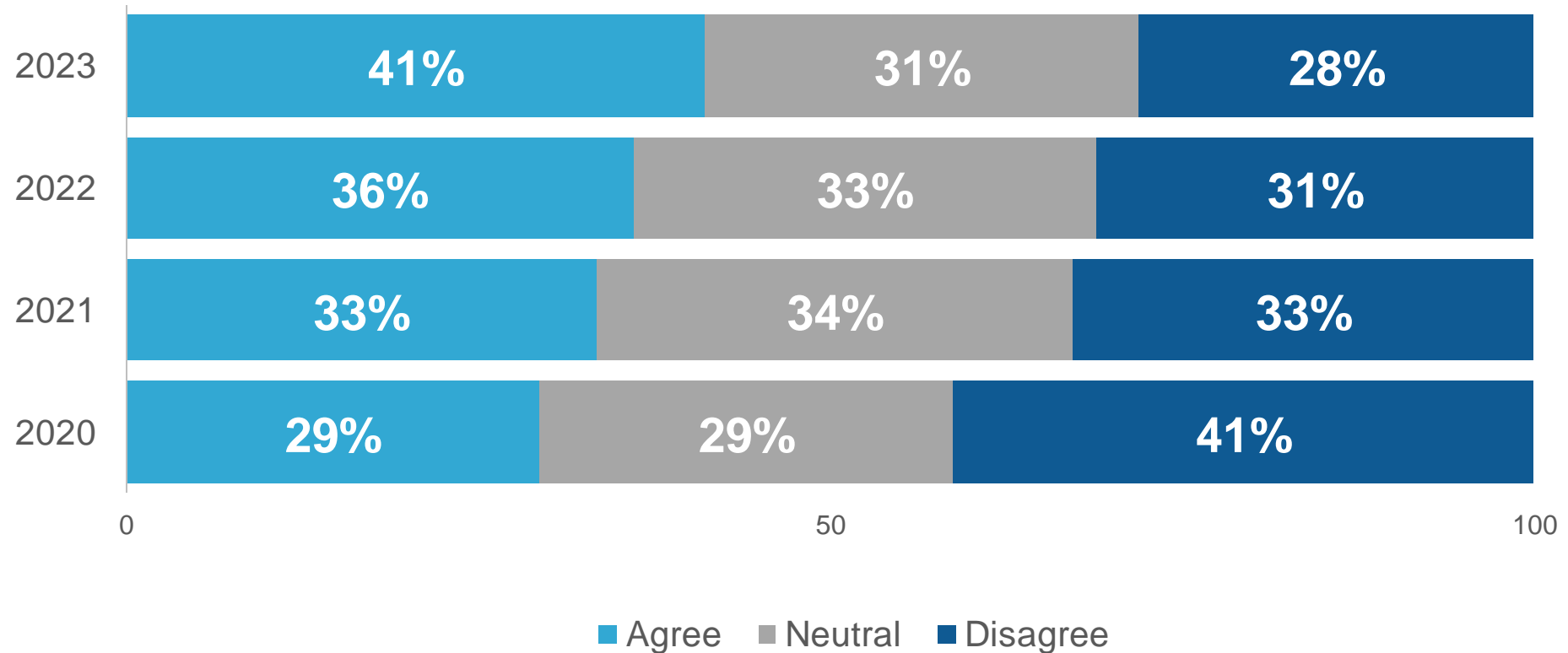
# Tourism Employment – U.S.

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



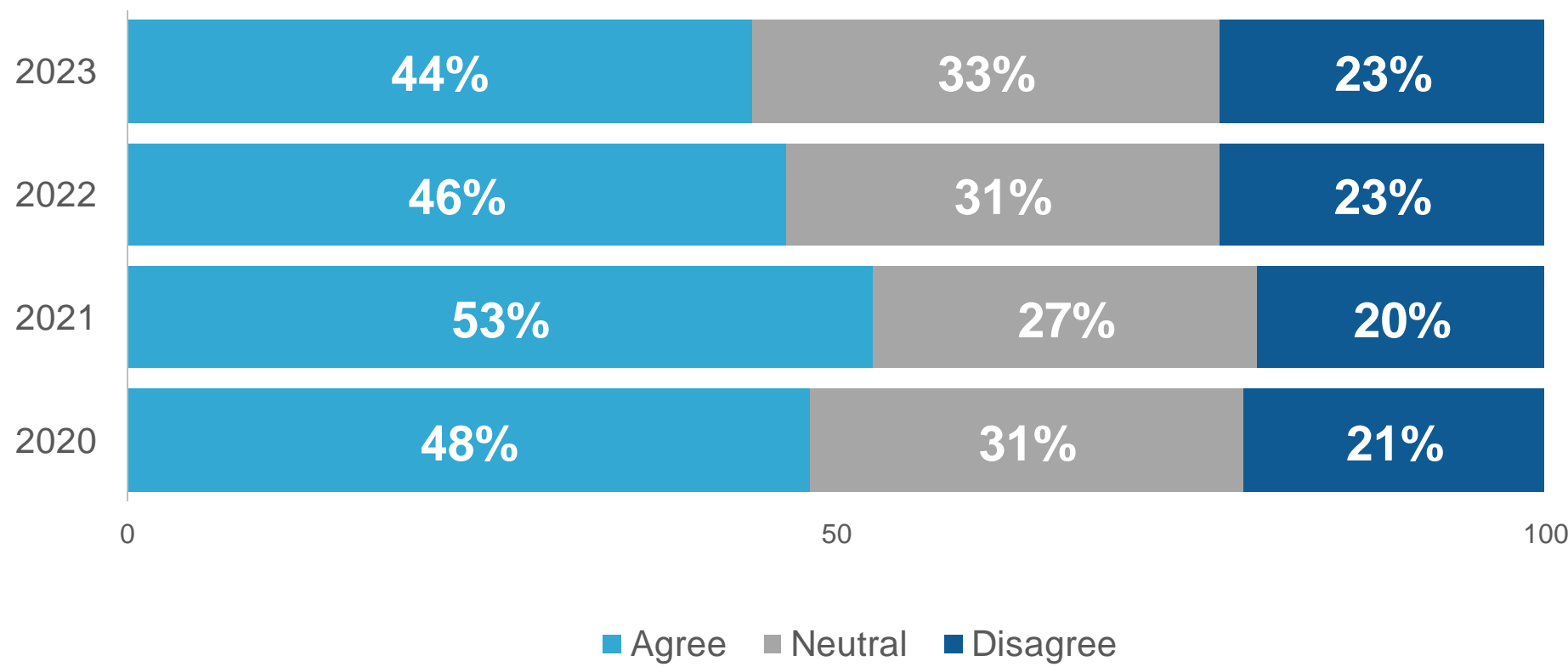
# Tourism Employment – U.S. Generation Z

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





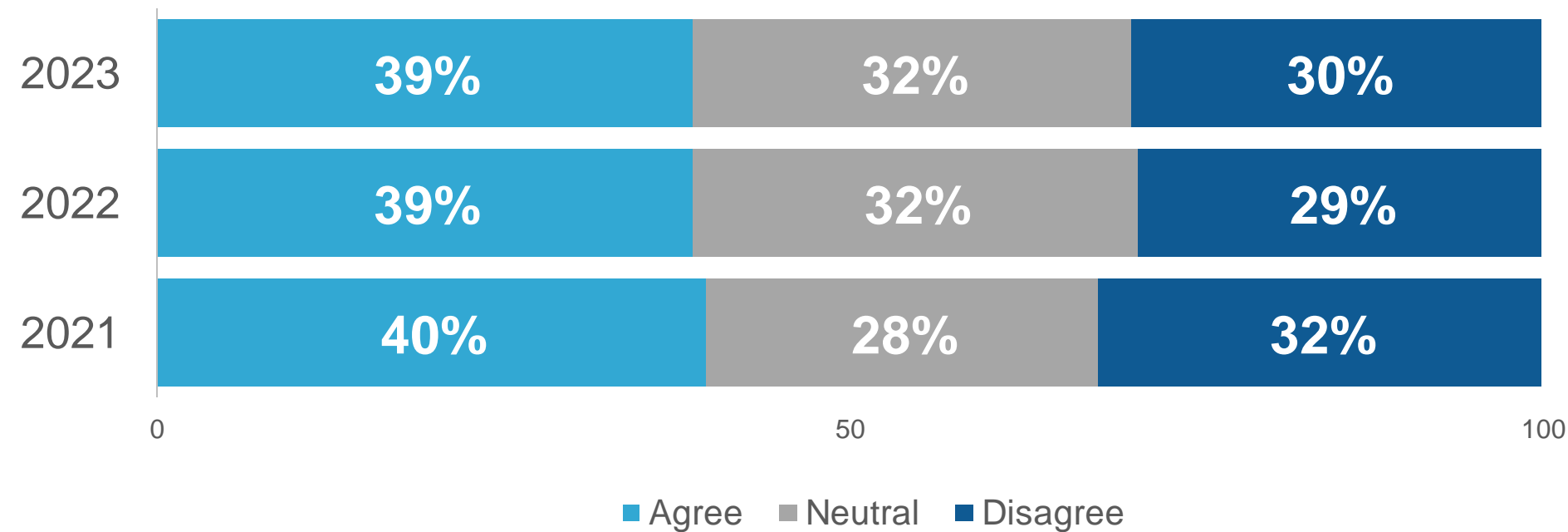
## Most jobs in the tourism industry are low-paying and seasonal



# Tourism Employment – U.S.

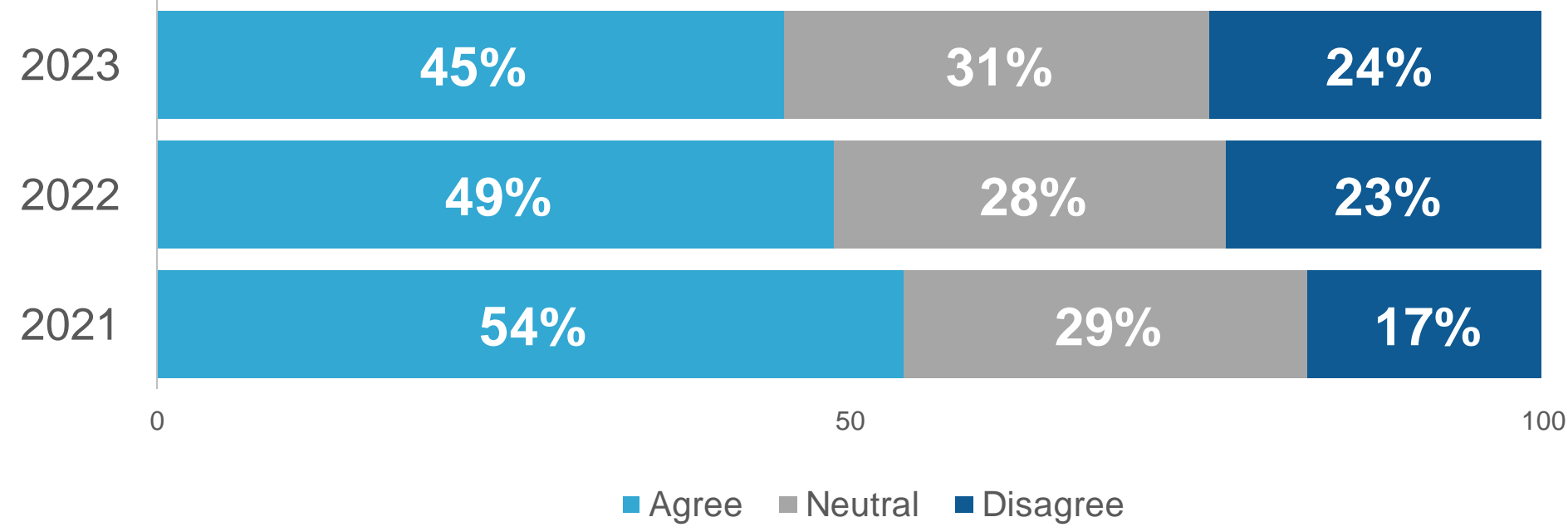
## Generation Z

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

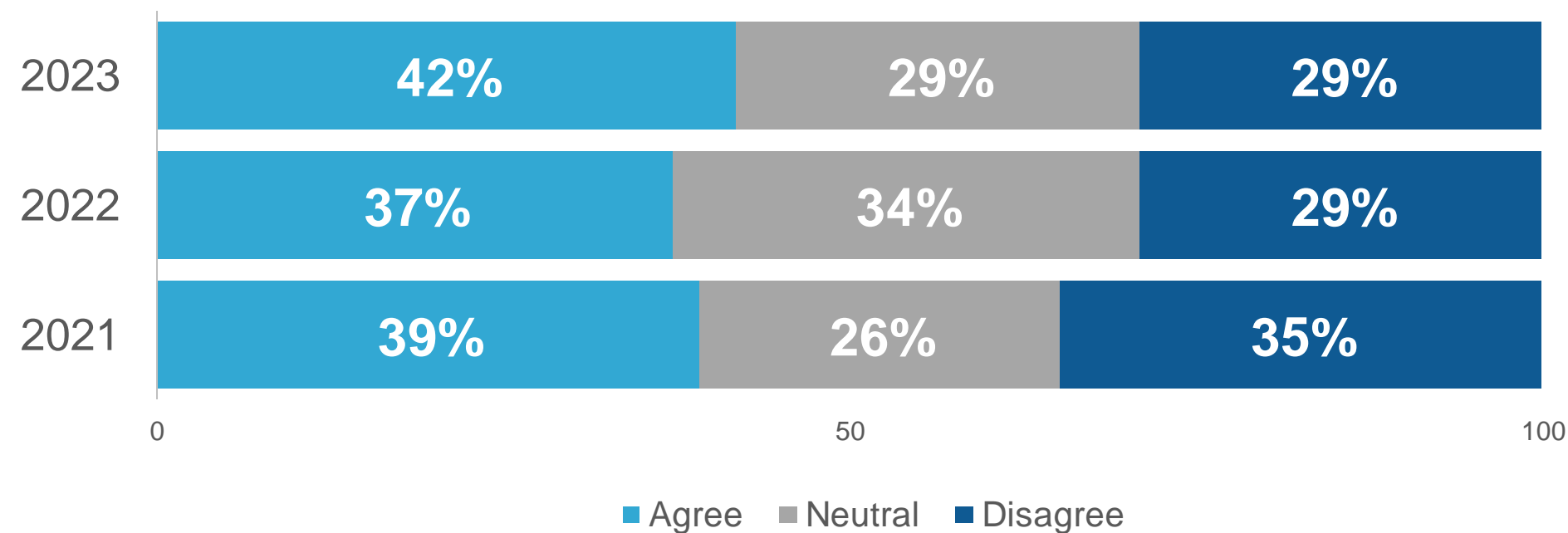


# Tourism Employment – U.S. Millennials

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

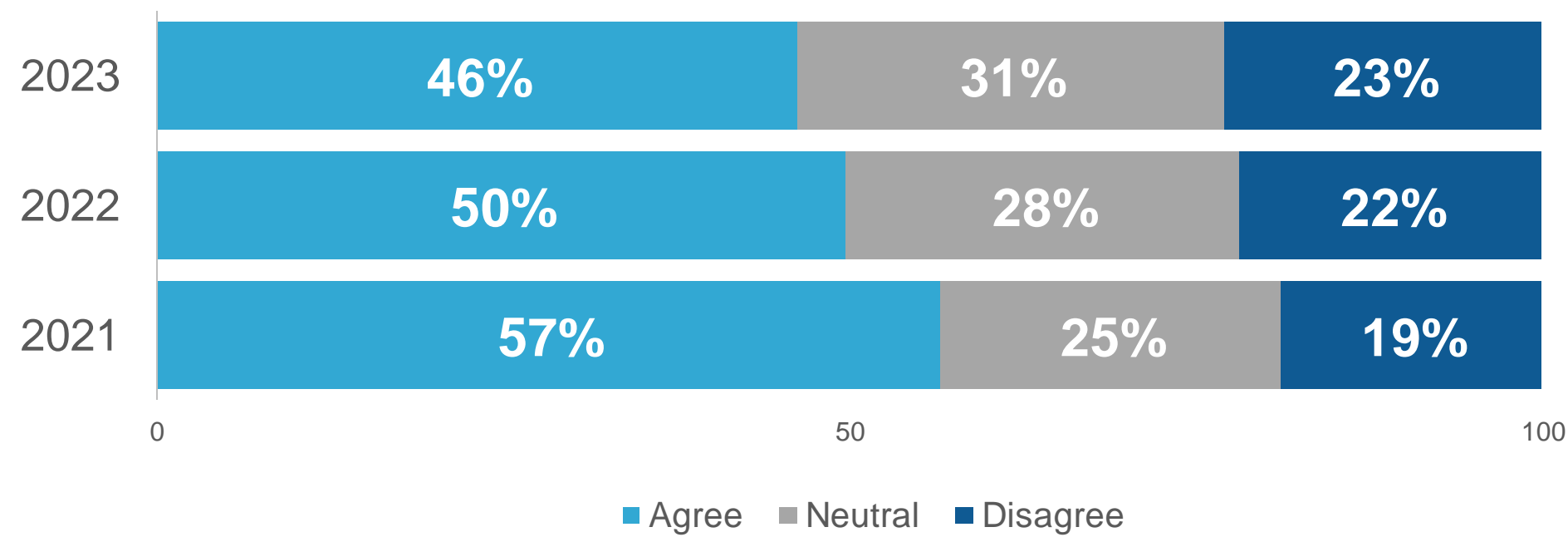


## There are opportunities for career advancement in the tourism industry



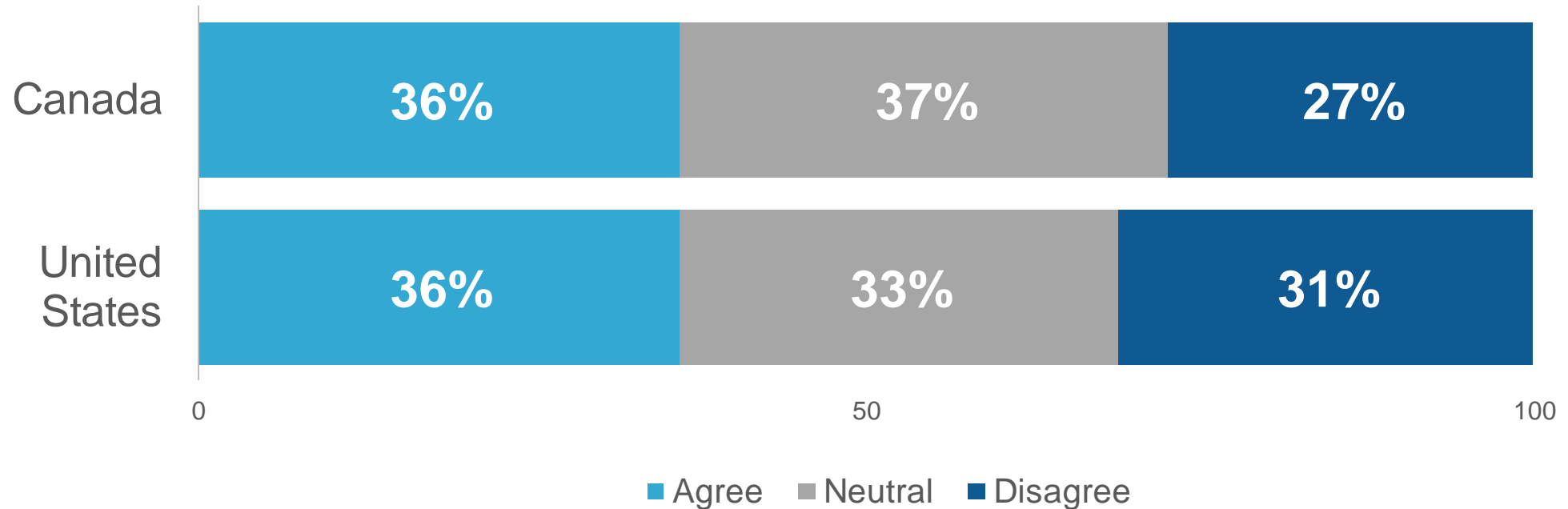
# Tourism Employment – U.S. Millennials

There are opportunities for career advancement in the tourism industry



# Overall Sentiment About Tourism – New in 2023

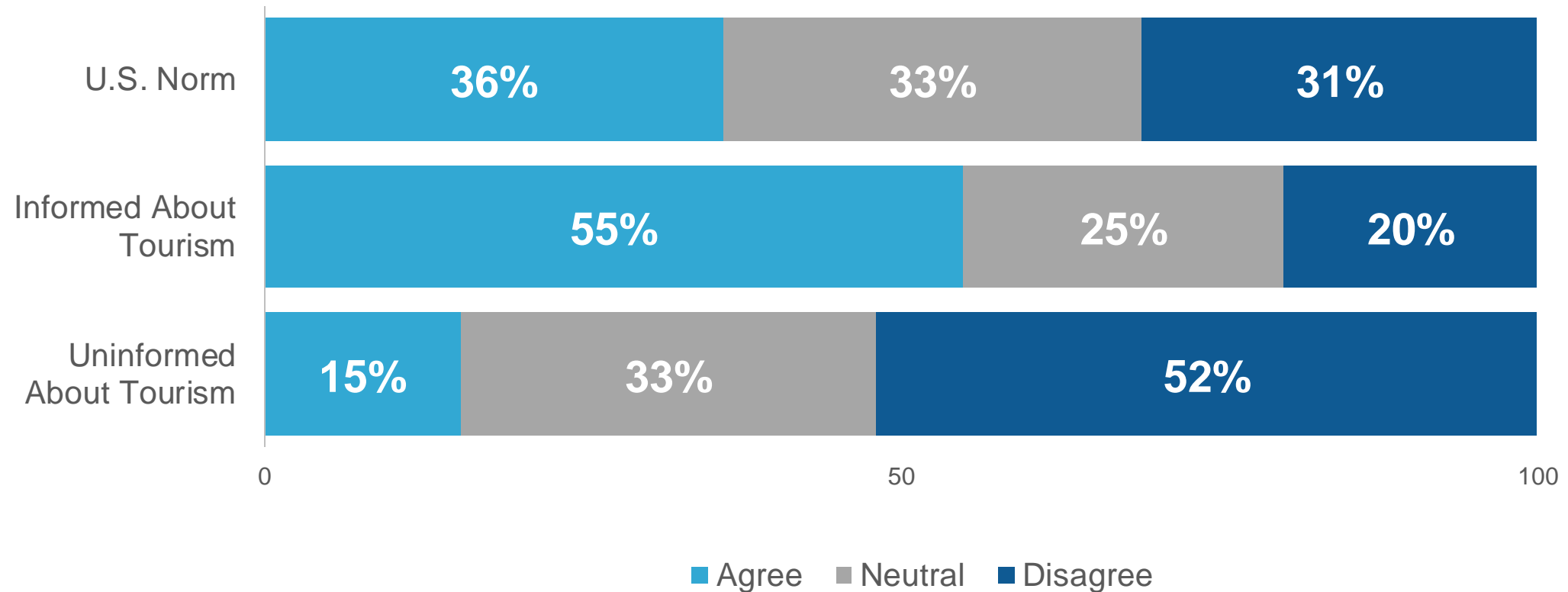
**My municipal/local government is doing a good job balancing resident quality of life and visitor satisfaction**



# Overall Sentiment About Tourism – U.S.

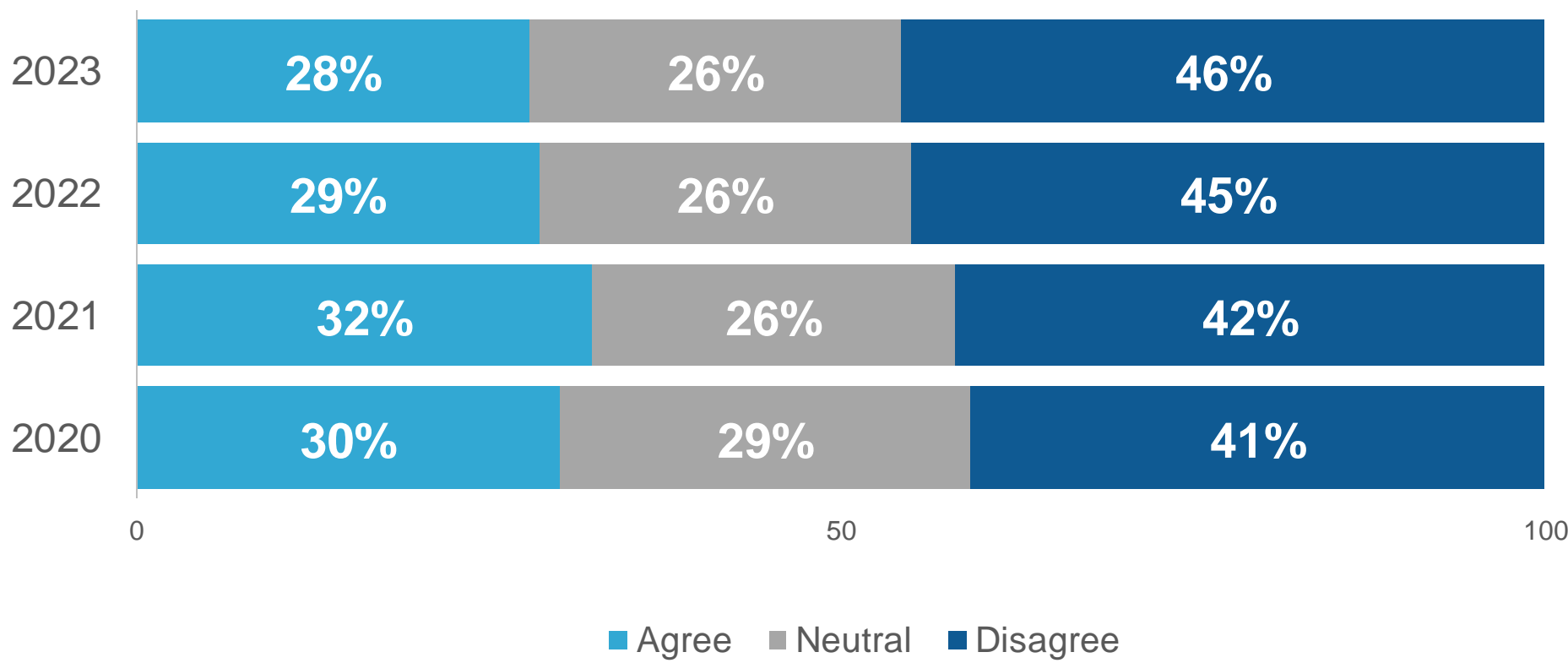
## Informed/Uninformed About Tourism

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



# Tourism Development and Growth – U.S.

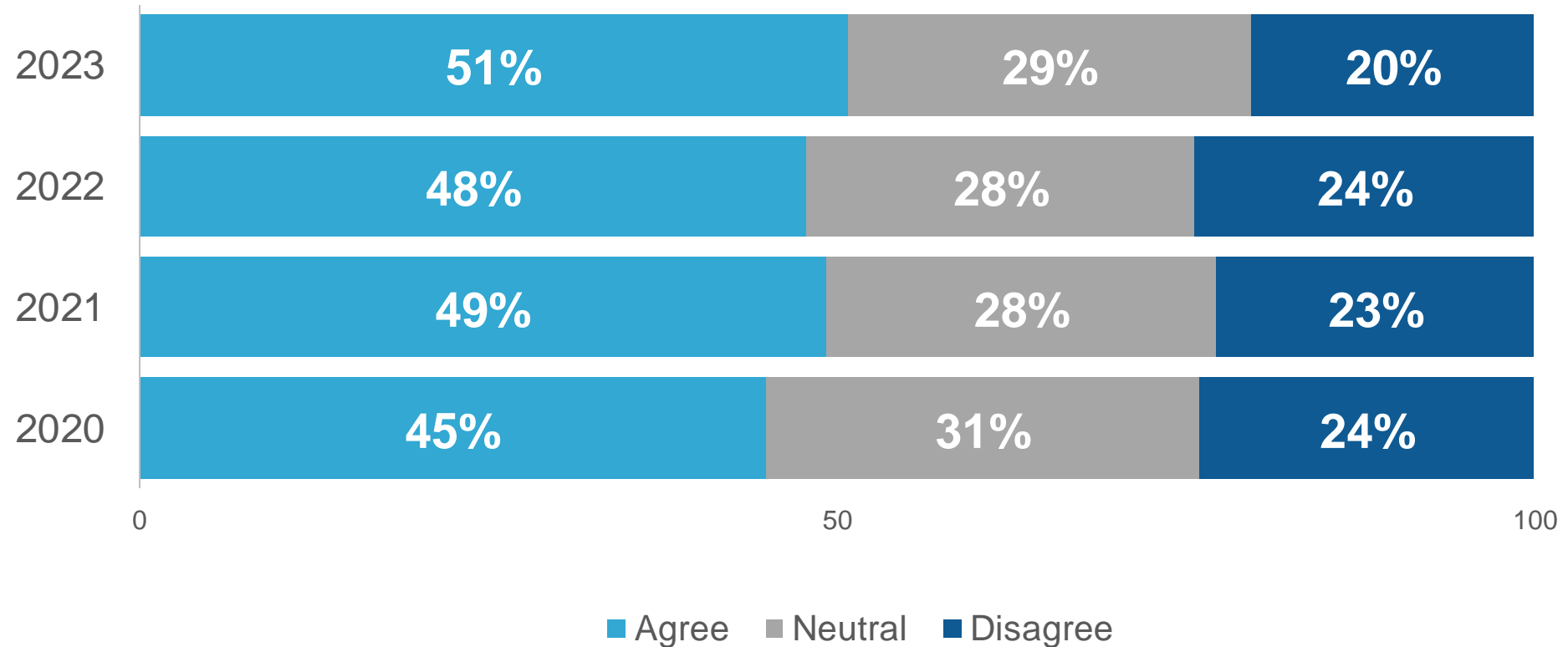
**Residents are consulted when major tourism development takes place in this area**





# 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

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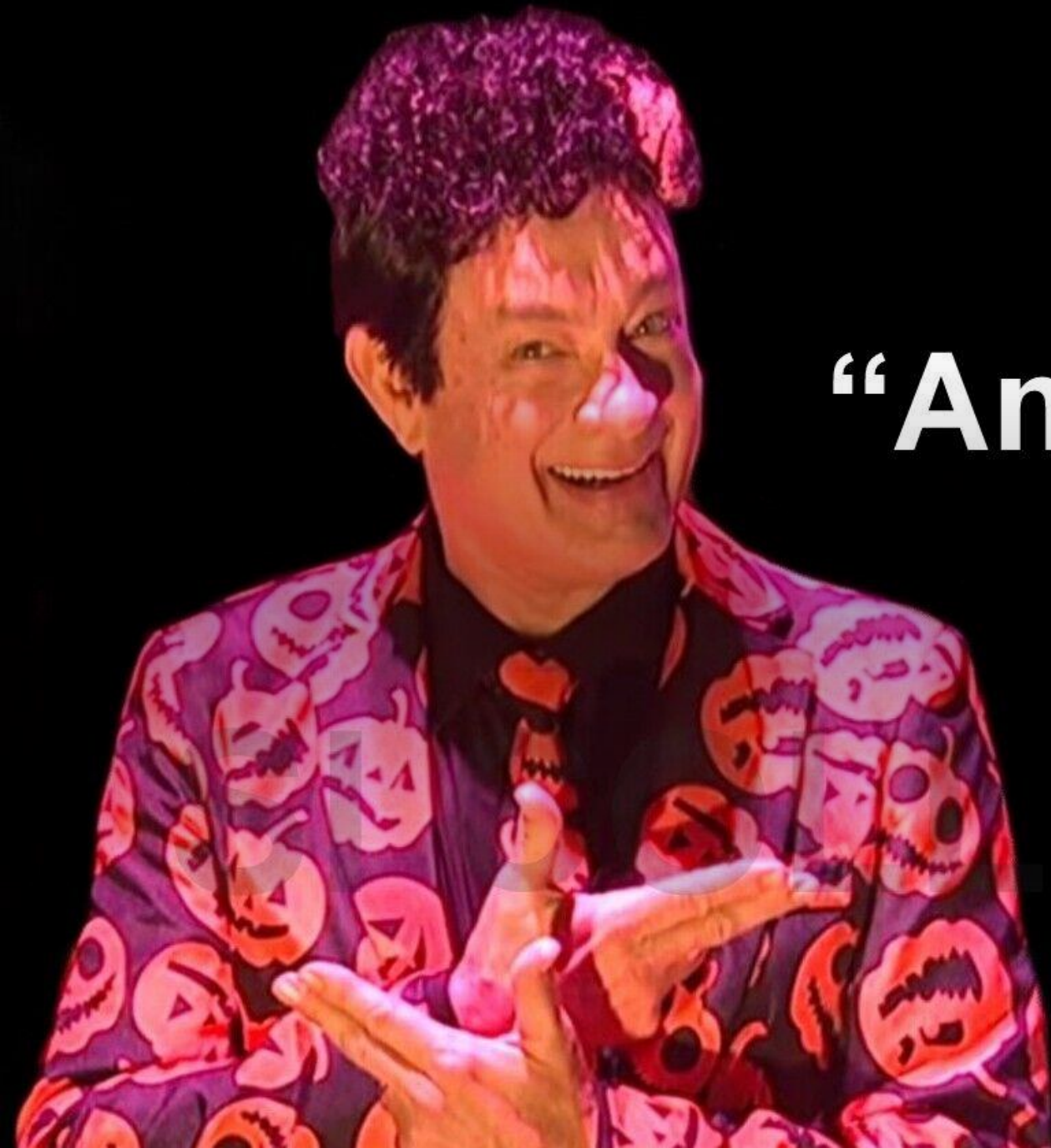


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aeylon





**“Any questions?”**

**LECTION**

**David S. Pumpkins**



# Thank You!

**Amir Eylon**

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