

North American Edition

**TIME FOR  
DMOCRACY**

## RESIDENT SENTIMENT RESEARCH



# Global Best Practices in Community Engagement

Section 2 of 6

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## Acknowledgement and Thanks

Thank you to our Knowledge and Destination Partners for their invaluable involvement in the Time for DMOCRACY, North America Edition.

### Destination Partners in Time for DMOCRACY (North America)

Thank you to our North America Destination Partners who supported, contributed to and collaborated in this important global research study:



### Knowledge Partners on Resident Sentiment Research

Thank you to our Knowledge Partners who contributed their insights and expertise to the Resident Sentiment Research section of the Time for DMOCRACY report:



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# Introduction

Tourism has always had a considerable impact—both positive and negative—on destination residents. Understanding how tourism has shaped local community attitudes towards tourism is critical. The Time for DMOcracy study has revealed that investment in resident sentiment research is a foundation of successful community engagement.



Lead Author: Dr. Whitney Knollenberg, College of Natural Resources, North Carolina State University. In collaboration with Miles Partnership and other partners in the Time for DMOcracy study.

## At a Glance

- Only 13% of North American destination marketing or management organizations (DMOs) engage in regular resident sentiment research (at least once per year). More than half of all DMOs (52%) have never undertaken resident sentiment research at all.
- European DMOs by comparison are more likely to invest in resident sentiment research with 25% undertaking it regularly and only 21% never having surveyed their community.
- This lack of research means the vast majority of DMOs are operating without a full understanding of the impact tourism has on the residents of their community and the community support for the sector.
- Valuable resident sentiment research should include both ongoing, consistent monitoring of community perceptions of tourism (longitudinal measurement) and questions to identify emerging issues.
- Resident sentiment research is most useful when taken in context with other destinations and organizations. Partnering with other DMOs at a regional level and engaging with local organizations who have an interest in resident sentiment can save costs and help benchmark performance.

### WHAT TO KNOW



- Efforts to collect resident sentiment data need to reflect the diversity of the destination community. DMOs need to account for many factors such as primary language spoken, race, ethnicity, neighborhood, length of residence and employment in tourism when sampling residents.
- There is a robust toolbox to draw from when collecting resident sentiment data. DMOs should consider utilizing online platforms or social media as avenues to reach residents as these tools reduce the barriers to resident participation. A mix of qualitative and quantitative data provides a more holistic understanding of resident sentiment.
- DMOs should use resident sentiment data to create destination management strategies that maximize positive impacts for residents and utilize resident sentiment as a KPI to assess impacts of destination management strategies.

### WHAT TO DO

Time for DMOCRACY identifies eight practical recommendations for how DMOs can implement and utilize resident sentiment research to gain a more holistic understanding of local communities and the response to destination management strategies:

1. Commit to **consistent resident research** to track changes over time.
2. **Monitor emerging issues** to fully understand the impacts of tourism on destination community residents.
3. Organize **cooperative research** to facilitate benchmarking.
4. **Align your research** with existing resident research conducted by local partners.
5. Ensure your research is **inclusive of all destination residents**.
6. Leverage **online tools to limit barriers** to resident participation.
7. Maximize **quantitative and qualitative data** to gain a broad and deep understanding of resident sentiment.
8. **Integrate** resident sentiment findings in management plans.

### RESOURCES

We highlight and share a range of critical research, case study examples and other resources to inform your action. See Page 17.

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### a. Resident Sentiment Research in North America

Only 13% of North American DMOs consistently take action to measure resident sentiment. More than half of all DMOs (52%) have never invested in such research. By comparison, European DMOs are more likely to invest in resident sentiment research. One quarter (25%) undertake research regularly, and only 21% of DMOs have never surveyed their community [i]. This leaves most North American DMOs with a weaker understanding of how residents feel about tourism in their community. Gathering data on resident sentiment will improve tourism management and marketing actions, but it requires a strategic approach which accounts for the frequency of measurement, topics to assess and partnerships.

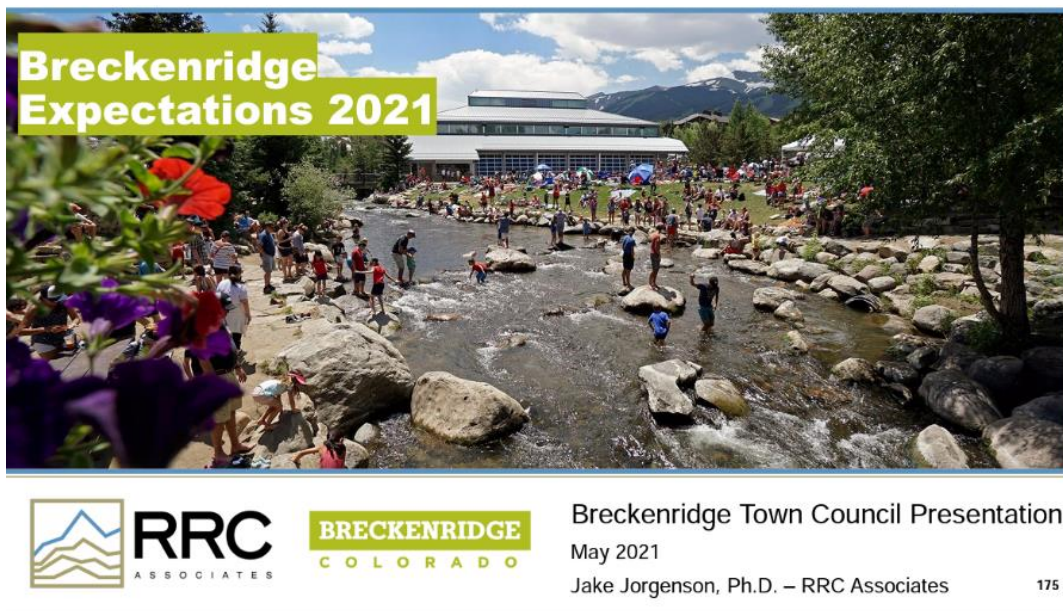


Figure 1 The Breckenridge Tourism Office has undertaken [detailed resident sentiment research](#) down to a neighborhood level since 2016.

## b. Resident Sentiment Data Collection Strategies

Resident sentiment research provides a consistent assessment of the benefits and challenges residents recognize from tourism, allowing DMOs to adjust destination management and marketing strategies to account for changes in perceptions. Ideally, resident sentiment data are gathered on an at minimum annual basis. For destinations where there are no significant issues or concerns around tourism, this frequency could be every couple of years. The state of Montana worked with the University of Montana for thirty years to annually assess resident sentiment towards tourism statewide [ii]. This allowed the state and local-level DMOs to identify the impacts of management and marketing efforts and recognize when action needs to be taken to improve resident perceptions of tourism.



Figure 2 Montana is one of a small number of U.S. states that undertakes regular [resident sentiment research](#).

When measuring resident perceptions, DMOs need to account for topics beyond the baseline assessment of tourism’s contributions to quality of life and the economy. To maximize the resources used to gather resident sentiment data, DMOs need to identify and evaluate emerging issues related to tourism. In its robust efforts to gather resident sentiments towards tourism, the Park City Chamber & Visitors Bureau uncovered “hot topics” such as the impact of climate change on the community and the strain tourism causes on infrastructure systems [iii]. Knowledge of residents’ concerns allows Park City to take action to address them and continue measuring sentiment around these issues in future studies.

### c. Destination Collaboration is Key

In addition to creating more strategic and wider-ranging resident sentiment studies, DMOs must also consider how to compare their residents' sentiments to those within other destinations. Partnerships at the provincial or state level can allow for benchmarking with neighboring destinations, allowing DMOs to gain more context for how their residents perceive tourism.

Destination British Columbia leads a province-wide assessment of resident sentiment which allows for individual destinations to compare their performance against others [iv]. Benchmarking can be used to illustrate areas that DMOs need to focus on to improve resident sentiment towards tourism and can highlight areas that they are excelling in. Data across destinations also provides a collaborative regional perspective from which to tackle "hot topics" like housing availability and infrastructure strain.



Figure 3 More than 20 destinations within the Canadian Province of British Columbia work with the provincial tourism office—Destination British Columbia on resident sentiment research survey, allowing economies of scale and benchmarking between DMOs.



Figure 4 Tampa is an example of a city that undertakes its own resident sentiment research on topics including affordability, transportation, and workforce. DMOs can collaborate with such government surveys



DMOs are not the only organizations interested in resident sentiment studies. Local level governments and economic development organizations also frequently assess residents' sentiment towards several issues (e.g., quality of life, affordability, workforce viability). For example, the City of Tampa, Florida annually assesses residents' perceptions of transportation, workforce development, housing affordability, and sustainability and resilience [vii]. These are all relevant topics to DMOs as well. DMOs can partner with organizations that are also interested in resident sentiment to share costs and increase response rates to data collection efforts—residents are unlikely to respond to multiple requests to share their sentiments.

## d. National and International Studies and Benchmarking Data

DMOs can also utilize resident sentiment studies at the national or multinational level to compare their own results to a broader set of data. For example, Longwoods International and Destinations International's American Resident Sentiment Towards Tourism study [v] collects and reports data on how U.S. and Canadian residents view a wide range of tourism-related issues.

There are also options at an international level; for example, UNWTO's Global survey on the perception of residents towards city tourism [vi] provides insights across a range of countries to provide context to DMOs on their own destination's performance.



Figure 5 Longwoods and Destinations International's U.S. and Canadian resident sentiment research summary can provide an overview of major issues and a comparison for individual DMO's research results.



There is also the potential to benchmark resident sentiment research questions against an international data set. TCI Research, a European research agency, offers benchmark comparison data from more than 40 international cities and destinations against a range of standardized questions—available to any DMO or research agency to include in their own survey. This allows DMOs to compare their responses to the norm from a benchmark group of destinations.

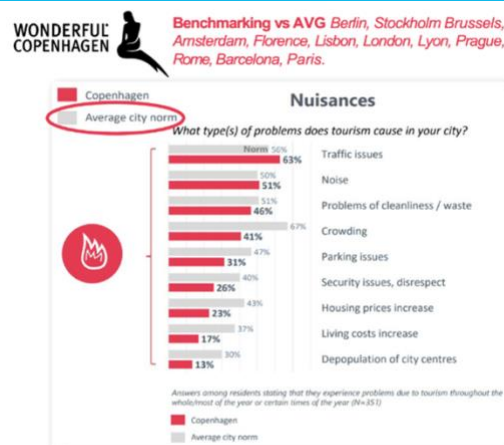


Figure 6 More detailed benchmarking of resident research is possible if a state or province organizes an integrated resident research reporting process or works with a research firm that consults with a range of DMOs and offers benchmarking data—as in this example for Copenhagen (TCI Research).

## e. Your Data are Only as Good as Your Sample

When collecting resident sentiment data, it is vital to hear from all voices in a community. Gathering data from a sample that reflects the full population of your destination will improve the accuracy of findings and ensure that DMOs are aware of all resident concerns. To gain a representative sample, consider the diversity of a community—residents, and their perceptions of tourism, differ based on many factors including race and ethnicity [viii], employment in tourism [ix], length of residency [x], age [v] and the neighborhood they live in. In Vancouver, British Columbia and Breckenridge, Colorado resident sentiment research is conducted at the neighborhood level to ensure geographic diversity in the sample and to capture the sentiments of both those who live near tourism activities and those who live farther from tourist centers [xi].

DMOs that are inclusive in their sampling efforts will be able to identify a diverse sample. However, to gather data from all residents, the language used in data collection instruments (e.g., surveys or focus groups) also needs to be considered. Residents who speak a primary language other than English may be excluded from data collection if only English-language surveys or focus groups are offered.

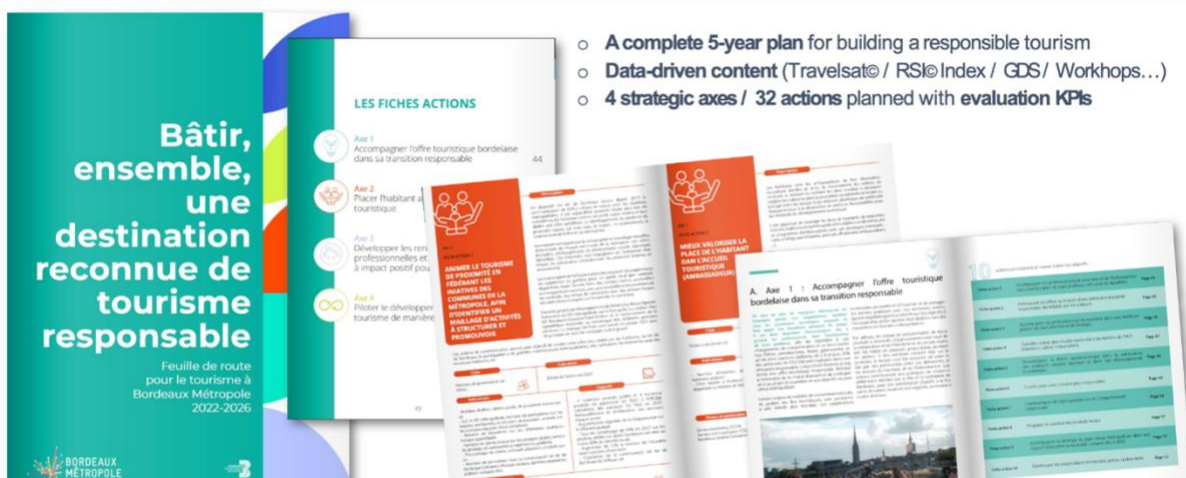


The Breckenridge Tourism Office and its partners RRC Associates address this potential limitation by distributing both English and Spanish language surveys [xii].

*Figure 7 Breckenridge Tourism Office's Resident Sentiment Research contacts every household in the town allowing survey data to be segmented by neighborhood. The survey also includes specific outreach efforts to engage with Spanish speaking residents and workers.*

## f. Find the Right (Measurement) Tool for the Job

Even with inclusive sampling and data collection efforts it can be difficult to get residents to respond to surveys or participate in focus groups. Finding multiple avenues for gathering resident sentiment data will increase DMOs' ability to reach a diverse sample and gain meaningful insights.



*Figure 8 The Agora Tourism Bordeaux program incorporates resident sentiment research into a long-term destination management strategy including a community engagement program*

Using online discussion platforms can eliminate barriers to participation such as lack of transportation or childcare [xiii]. The [Agora Tourism Bordeaux program](#) utilized a mix of online and in-person workshops to both gather insights from residents and illustrate how the Bordeaux Métropole and the Tourism and Convention Office would act upon their findings—via the creation of a roadmap for tourism development in the community [xiv]. This helped them reach a wider audience and engage residents in the process of creating tourism development strategies.

DMOs should also consider gathering resident sentiment data both quantitatively (numbers, like those that can be generated from a survey) and qualitatively (words or images, like those that can be generated through focus groups or interviews). Doing so provides a more holistic understanding of resident sentiments as qualitative data can provide a deep understanding of the issues, and quantitative data can be used to assess how those issues are generalized across the destination's resident population.

Sentiment analysis of social media conversations can complement more traditional research methods. While difficult to differentiate residents from other social media users, social media sentiment analysis tools can help identify trending and topical issues that are emerging as concerns. These issues can then be better understood through community consultation and/or including them in resident sentiment research.

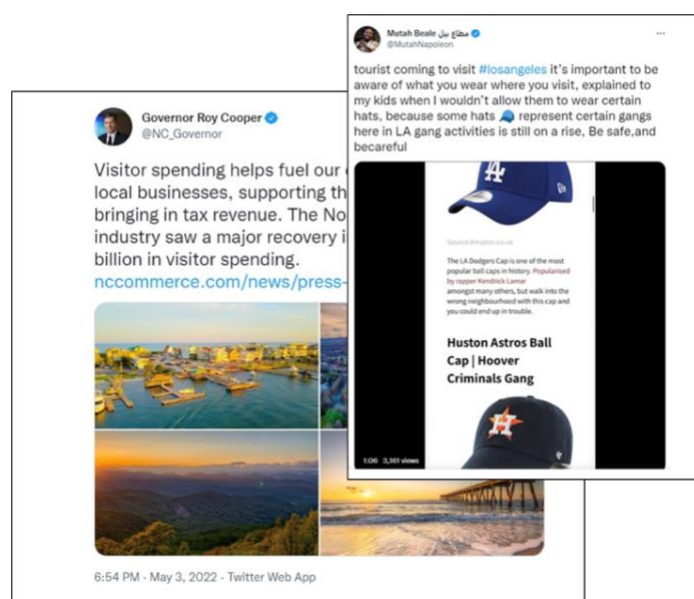


Figure 9 Social media sentiment analysis tools used to assess the reach and content of online conversations about a destination can also be used to help identify trending or topical issues that should be monitored or researched.

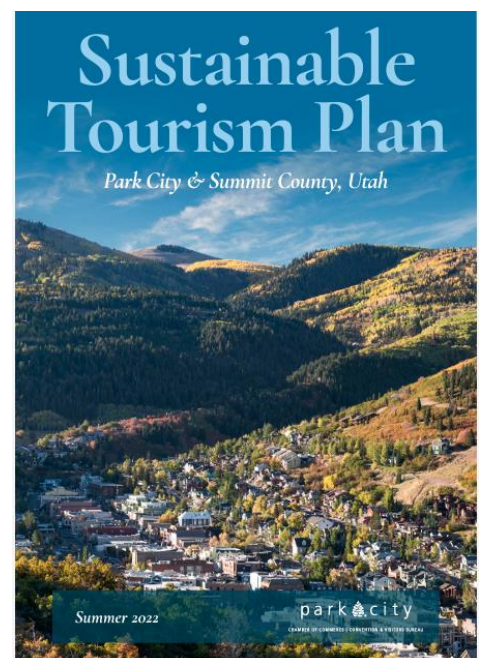
## g. Resident Sentiment Research in Destination Management

The [Agora Tourism Bordeaux program](#) in Bordeaux, France and [One Breckenridge](#) in Breckenridge, Colorado are examples of how resident sentiment research is most effective when undertaken within a holistic destination management plan—which links resident feedback to tourism management and planning. This approach ensures feedback on a wide range of concerns, including parking, the impact of short-term rentals or sustainability, which can result in more effective actions to manage or mitigate these impacts. More broadly, a holistic destination management plan empowers DMOs to work with other agencies, leveraging tourism to help develop the community and lift the quality of life for residents.

## h. Resident Sentiment Research Informing KPIs

As the impacts of tourism continue to evolve and there becomes a need to communicate these changes with stakeholders, DMOs must include resident sentiment data as a key performance indicator (KPI). Only 17% of the 292 North American DMOs responding to the Time for DMOcracy survey currently have a KPI on resident sentiment or community engagement [xv].

As noted by Longwoods International, “Resident sentiment is an essential metric for destination marketers to keep a pulse on their communities in order to create meaningful programs and partnerships” [xvi]. Including resident sentiment as a KPI allows DMOs to assess the impact of destination management and marketing strategies. It can also be used to illustrate how DMOs’ actions are improving resident quality of life and addressing other “hot topics” that may be particularly important to residents. Park City Chamber & Visitors Bureau illustrates how to put resident sentiment research into action with its implementation of a Sustainable Tourism Plan, which was developed with residents’ priorities in mind [iii].





# What To Do

## 8 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Commit to independent, consistent resident research to track changes over time.
2. Monitor emerging issues to fully understand the impacts of tourism on destination community residents.
3. Organize cooperative research to facilitate benchmarking.
4. Align your research with existing resident research conducted by local partners.
5. Ensure your research is inclusive of all destination residents.
6. Leverage online tools to limit barriers to resident participation.
7. Maximize quantitative and qualitative data to gain a broad and deep understanding of resident sentiment.
8. Integrate resident sentiment findings in management plans.

### 1. Commit to independent, consistent resident sentiment research

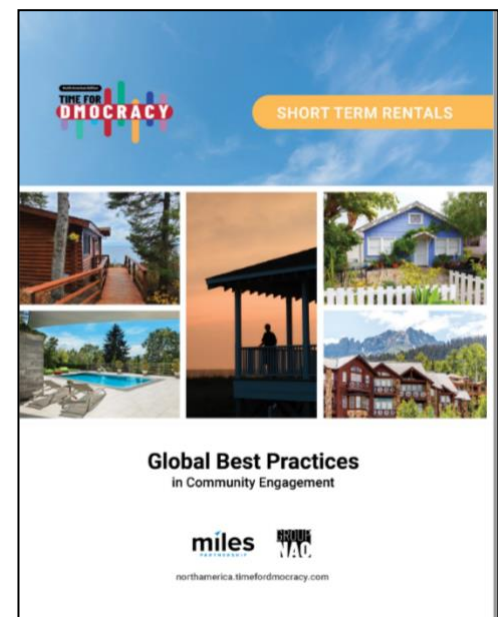
A majority of DMOs are missing an opportunity to hear the voices of those who are impacted by tourism. DMOs need a longitudinal approach to resident sentiment research to stay on top of emerging issues and improve understanding of residents' perception of tourism. Design and distribute tools to measure resident sentiment and assign resources (e.g., staff, budget) to ensure this is a priority for your destination.

Resident sentiment research can be undertaken with a specialist research agency or a suitably experienced university, public institution, or NGO. While in-house staff can potentially conduct this research, partner with an independent third party to deliver truly objective results. Develop a concise research brief with your requirements to guide the selection process—whether you run an open bid process or send it to a small number of pre-selected potential partners.



## 2. Monitor emerging issues to fully understand the impacts of tourism on destination community residents

Your research should monitor and track feedback on a consistent set of questions related to local resident's perceptions of tourism and its impacts on, and benefits for, the community. But you should also identify emerging and growing issues and ensure you are collecting resident sentiment on "hot topics" like Short Term Rentals and housing availability (covered in a separate section of this Time for DMOCRACY report – see right), sustainability and other current impacts of tourism. Having data on these topics, particularly when gathered over multiple years, can help you gauge what topics to prioritize in destination management plans and actions. Knowing how residents perceive these issues can also help you understand the best way to communicate your efforts to address them.



### **3. Organize cooperative research to facilitate benchmarking**

Resident sentiment research works best when you have context for your performance. Coordinate regional (e.g., state or province-wide) efforts to share costs and facilitate benchmarking with nearby destinations. Doing so will reveal opportunities for further collaboration on larger-scale tourism challenges that impact residents such as infrastructure improvements and essential housing. You can also learn how to address more localized tourism impacts (e.g., lack of parking) from peers.

### **4. Align your research with existing resident research**

There's no need to reinvent the wheel—or overwhelm residents with multiple surveys from numerous organizations. Find partners within your community, such as local governments or economic development associations, who are already conducting resident sentiment research. Sharing costs and expanding the opportunities to distribute the survey will benefit all partners. Strategic partnerships can help you highlight tourism's role in quality of life and economic development.

### **5. Ensure your research is inclusive of all destination residents.**

Tourism impacts different communities in your destination in different ways. Design resident sentiment measurements to reflect the diversity of your community in the data. Make every effort to reach residents in all neighborhoods within your destination and to gain insight from both new and long-time residents. Translate surveys or offer focus groups in multiple languages to ensure those whose primary language is not English are included in your resident sentiment data.

## 6. Leverage online tools to limit barriers to resident participation.

Gathering resident sentiment doesn't require a survey—tap into online discussion or social media platforms to learn how tourism is perceived in your destination. Invite residents to participate in online discussion platforms to ensure you are hearing from those in your community. The public nature of social media makes it difficult to target residents specifically but allows you to reach a wider audience.

## 7. Maximize quantitative and qualitative data to gain a broad and deep understanding of resident sentiment.

Use multiple types of data to get a more holistic understanding of resident sentiments. Quantitative data, collected through tools such as surveys, can provide generalized findings across your sample of residents. This data are important for illustrating trends and setting priorities. Qualitative data, collected through tools such as focus groups, can give you a deeper understanding of resident sentiments or identify new “hot topics” to measure in a survey.

## 8. Integrate resident sentiment findings in management plans.

Don't waste the resources you put into gathering resident sentiment data; once you have it, take action with it. Use the data to develop destination management strategies, prioritize actions to address “hot topics,” and improve the way you communicate and engage with residents. Sharing findings back to your community also instills transparency in the process and illustrates how you plan to reduce negative impacts and maximize benefits tourism brings to residents of your destination.





# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. [Time for DMOCRACY Case study: Resident Sentiment Situation Assessment Visit Park City](#)
2. [Time for DMOCRACY Presentation: Agora-Tourism Bordeaux](#)
3. [Time for DMOCRACY Featured Research: Exploring Fijian's Sense of Place After Exposure to Tourism Development](#)
4. [Longwood International's American Resident Sentiment Towards Tourism – Highlights from the 2021 American Resident Sentiment Study](#)
5. [Hawaii Tourism Authority Resident Sentiment Survey 2021 Highlights](#)
6. [Breckenridge Expectations – Resident Sentiment Research 2021 and Breckenridge's OneBreckenridge Destination Management program](#)
7. Time for DMOCRACY Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com/>
8. [Resident Sentiment: An Essential KPI for Destination Marketers](#), n.d. Longwoods International

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- ii. [Attitudes Towards Tourism 2021: Quarterly Montana Resident Report/4<sup>th</sup> Quarter: November – December 2021](#), 2021 Institute for Tourism and Recreation Research University of Montana
- iii. [Park City & Summit County’s Sustainable Tourism Plan](#), 2022 Visit Park City
- iv. [Public Perceptions of British Columbia’s Tourism Industry](#), 2022 Destination British Columbia
- v. [American Resident Sentiment Towards Tourism](#), 2022 Longwoods International and Destinations International
- vi. [Global survey on the perception of residents towards city tourism: impact and measures](#), 2019 United Nations World Tourism Organization
- vii. [City of Tampa Citizen Sentiment Survey Results](#), 2022 City of Tampa, FL
- viii. [A cross-cultural analysis of tourism and quality of life perceptions](#). 2007, Andereck, K. L., Valentine, K. M., Vogt, C. A., & Knopf, R. C.
- ix. [Empowerment and resident attitudes toward tourism: Strengthening the theoretical foundation through a Weberian lens](#). 2014, Boley, B. B., McGehee, N. G., Perdue, R. R., & Long, P.
- x. [Resident perceptions and responses to tourism: individual vs community level impacts](#). 2022, Šegota, T., Mihalič, T., & Perdue, R. R.
- xi. British Columbia [Signals & Sentiment Dashboard](#)
- xii. Breckenridge Expectations – [Resident Sentiment Research 2021](#)
- xiii. [Time for DMOcracy Overview of Digital Resident Participation Platforms](#), 2022 Miles Partnership
- xiv. [Our Participatory Approach](#), 2022 Agora Tourism Bordeaux
- xv. Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com/>
- xvi. [Resident Sentiment: An Essential KPI for Destination Marketers](#), n.d. Longwoods International

### Other Resources:

[Time for DMOCRacy – Mapping Resident Sentiment Research: COVID era](#) – featuring Olivier Henry-Biabaud, Miles Partnership, TCI Research, June 2022

[Time for DMOCRacy – Agora: Tourism Bordeaux](#) – featuring Julie Benisty Oviedo, Miles Partnership, Bordeaux Tourism & Congress, May 2022

[We Live Here – campaign case study, Amsterdam](#) – featuring Edwin Scholvinck, Miles Partnership, Edwin Scholvinck, May 2022

[Case Study: Visit Park City – Resident Sentiment Situation Assessment](#), Miles Partnership, Visit Park City, October 2022

[Time for DMOCRacy – Resident Sentiment Research](#) – featuring Olivier Henry-Biabaud, Air Eylon and Michelle Drenker, Miles Partnership, TCI Research, Longwoods International, Destination Analysts, May 22

Time for DMOCRacy – [Featured Research: Exploring Fijian's sense of place after exposure to tourism development](#), Miles Partnership, September 2022

Time for DMOCRacy – [Featured Research: Highlights from the 2021 American and Canadian Resident Sentiment Studies](#), Miles Partnership, September 2022

Time for DMOCRacy – [Featured Research: Resident Sentiment Toward a Dominant Tourist Market, Miles Partnership](#), September 2022

[Powering a sustainable destination planning through data](#) – Bordeaux, TCI Research, May 2022

[Design, Testing & Execution](#), Destination Analysts, May 2022

[Introducing News Media Sentiment – Analytics to Residents' Attitudes Research](#), Hao, Fu, Hsu, Li, & Chen, Journal of Travel Research, 2020

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[Exploring Fijian's Sense of Place After Exposure to Tourism Development](#), Sports Events & Tourism Association & Longwoods International, 2009