



# The State of Resident Sentiment

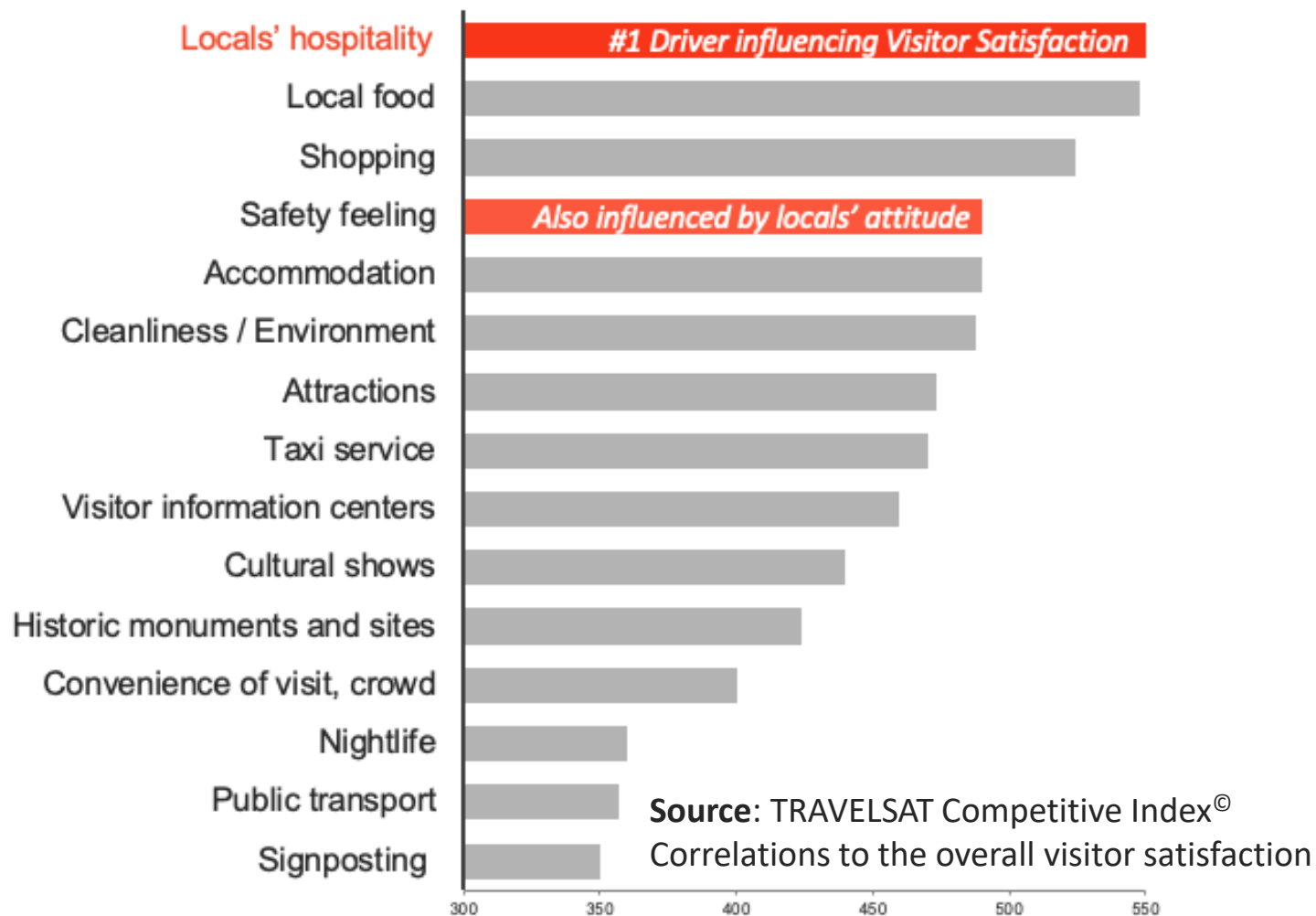
REBALANCING TOURISM AND QUALITY OF LIVE IN OUR EUROPEAN DESTINATIONS



EUROPEAN  
TRAVEL  
COMMISSION

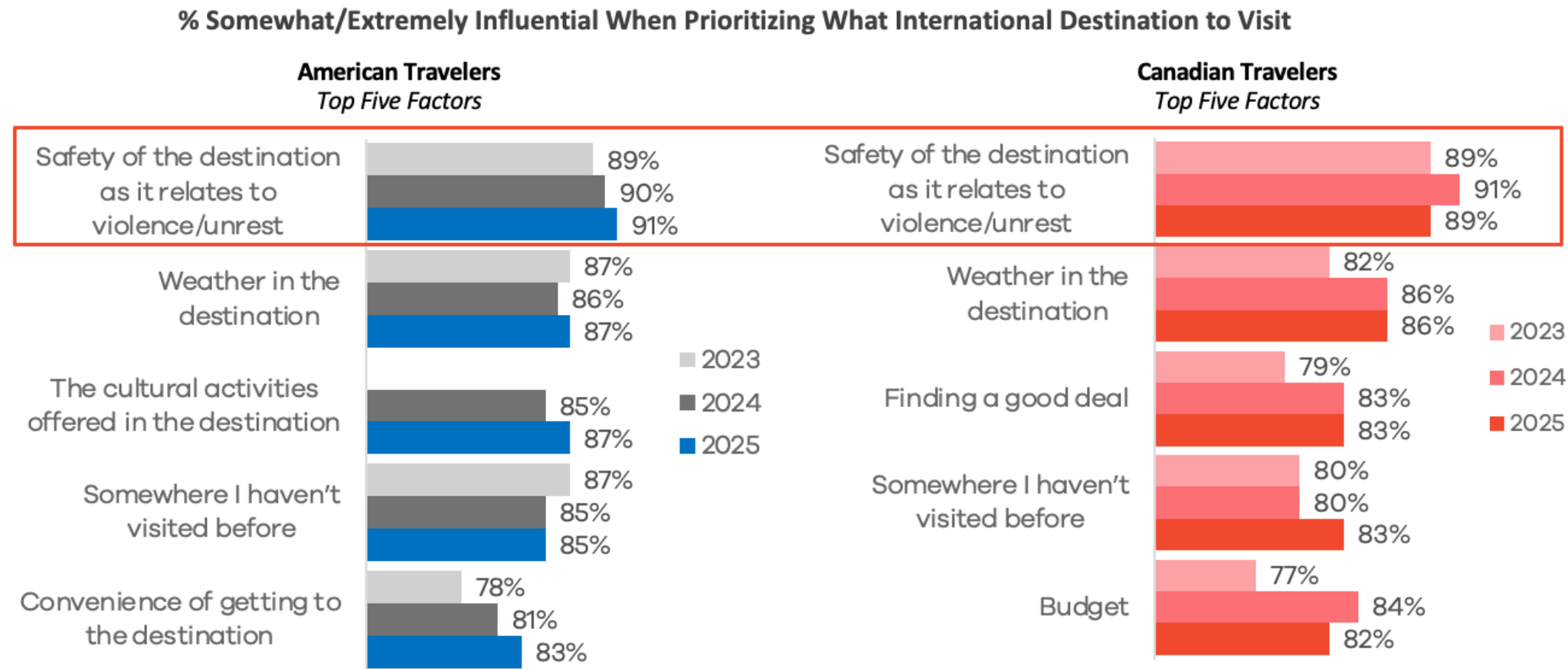
# Happy Residents = Happy Visitors

FACTORS MOSTLY CONTRIBUTING TO VISITOR SATISFACTION



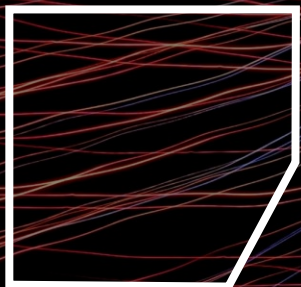
# Happy Residents = Safer Place Reputation

SAFETY FEELING DRIVES DESTINATION CHOICES



**Base:** Total respondents (n=2,064); American international travelers (n=1,046); Canadian international travelers (n=1,018)  
**Source:** MMGY's 2025 *Portrait of American and Canadian International Travelers*™





# Resident Sentiment Index<sup>©</sup>

DATA SOURCE

# RSI<sup>©</sup> - Resident Sentiment Index

DATA SOURCE



**Gold Standard** trusted by 80+ Countries, Regions and Cities

**40+ Key Sentiment Indicators** - NPS, Tourism Benefits, Vigilance areas, Expectations, Predictive factors...

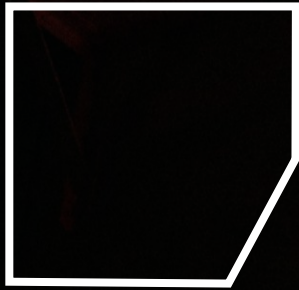
**Benchmarks** vs RSI<sup>©</sup> Norms to gauge gaps VS threshold levels

**Surveys + Social Listening data** to spot rising conversations

**8 Resident *Personas*** to simplify action-planning

**Special Analysis** based on a sample of **30 000 interviews (P2Y)** in: *France, United Kingdom, Spain, Italy, Germany, Slovenia, The Netherlands, Belgium, Denmark, Austria, Sweden, Ireland and Wales*. Large to Medium/Small Urban, Rural, Seaside, Islands and Mountain areas.





# Europeans' Support to Tourism

THE DRIVERS OF RESIDENT SATISFACTION TOWARDS TOURISM

# Noisy Media Vs Silent Majority

RESIDENT SUPPORT TO TOURISM IS HIGHER THAN WHAT YOU MAY THINK



## 8 in 10 Residents say...

*"Promote my place to attract visitors"*

*"I am proud to see visitors and **enjoy giving them tips**"*

*"Tourism creates **opportunities for local businesses**"*

## 7 in 10 Residents also say...

*"Tourism has a **positive impact on the place atmosphere**"*

*"Tourism **greatly impacts leisure and cultural on offer**"*

# Tourism as Antidote against Isolationism

RESIDENT SUPPORT TO TOURISM IS HIGHER THAN WHAT YOU MAY THINK

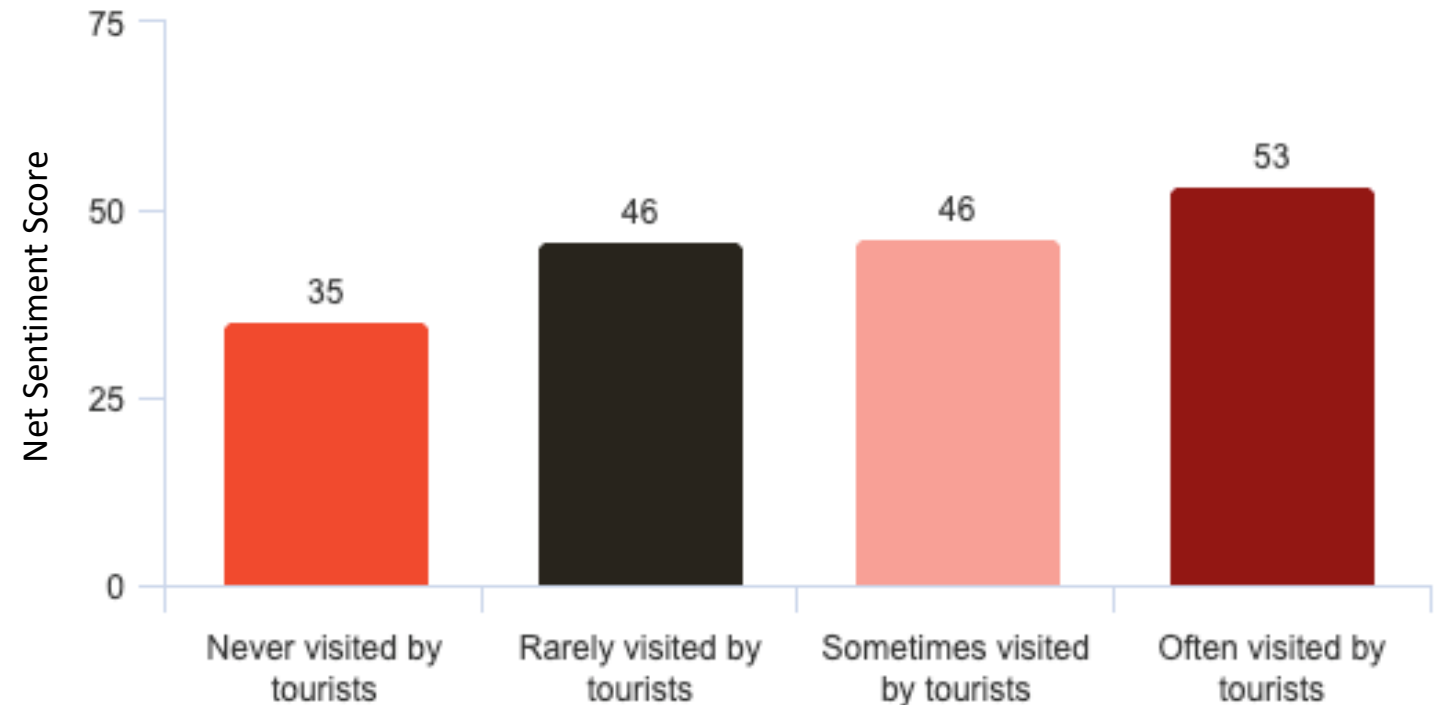
## 8 in 10 Residents

Want their place to **attract more or as many of international visitors** in the future

## 7 in 10 Residents

Say tourism is a **catalyst for diversity** in their place and **can inspire visitors to move** in their place

Net Sentiment Score x Visitation Levels



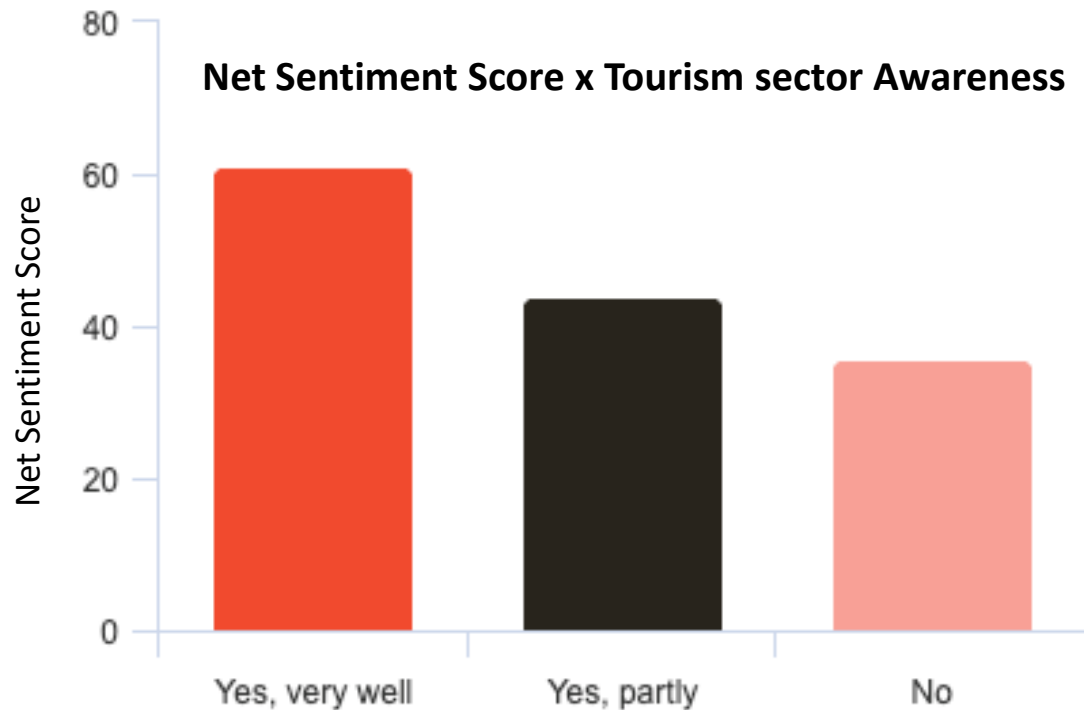


# Communication matters. Facts matter more

RESIDENT SUPPORT TO TOURISM GOES BEYOND THE VISITOR ECONOMY NUMBERS

## Sector Awareness influences positive perceptions

The **Sentiment** is **twice better** among residents who are **well-informed on tourism sector news**

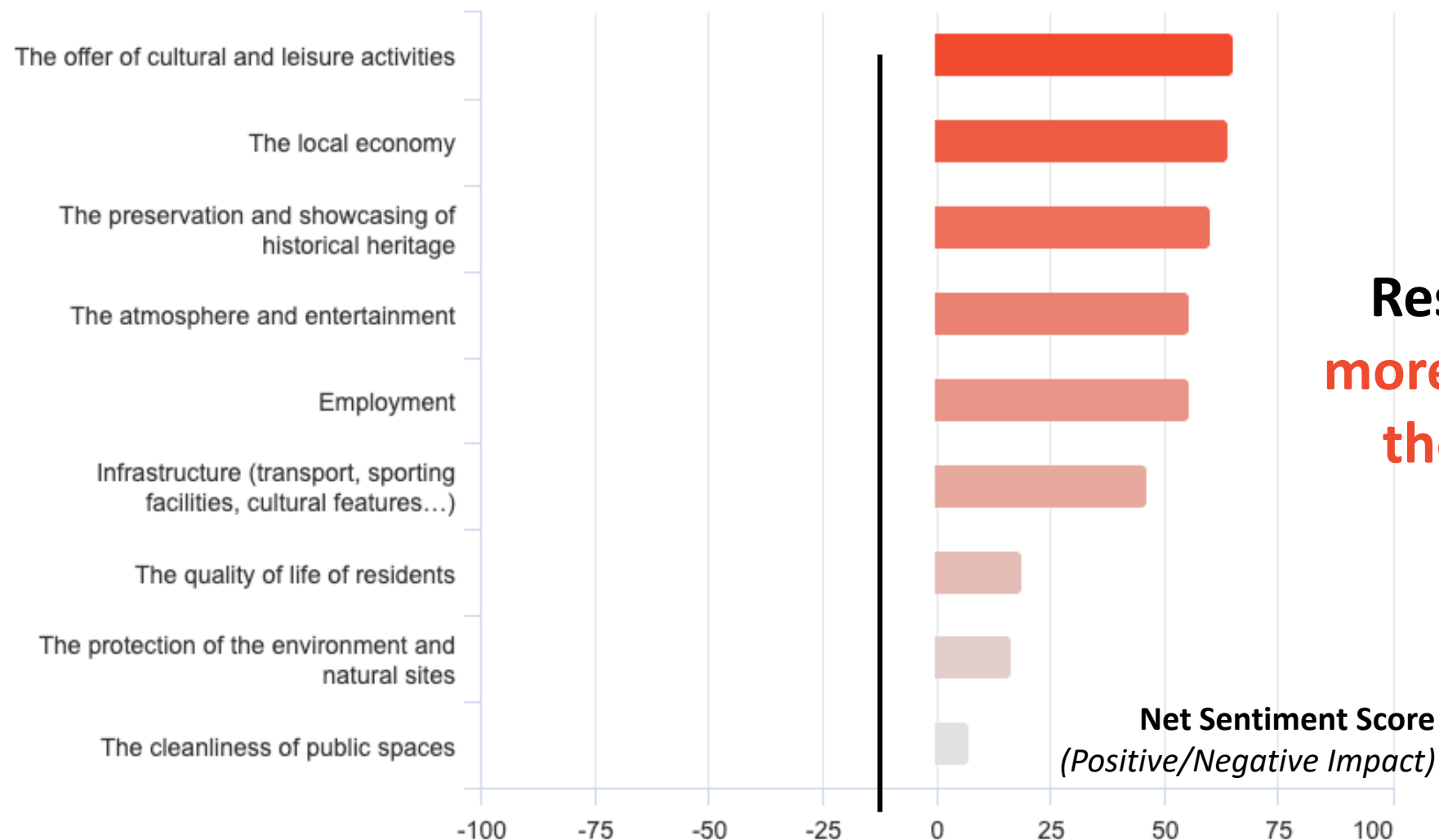


**“What’s in it for me”** and **visible impact** of tourism in **local business and vibes** influence more than the “big numbers” selling the tourism economy.

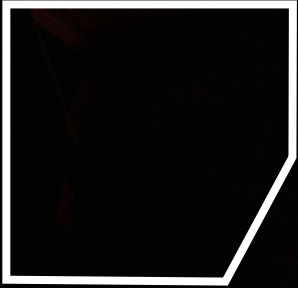


# Good for Visitors, Good for Residents

RESIDENT SUPPORT TO TOURISM GOES BEYOND THE VISITOR ECONOMY NUMBERS



**Residents see much more benefits than just the Tourism Euros!**



# The Challenges

THE DRIVERS OF RESIDENT DISSATISFACTION TOWARDS TOURISM

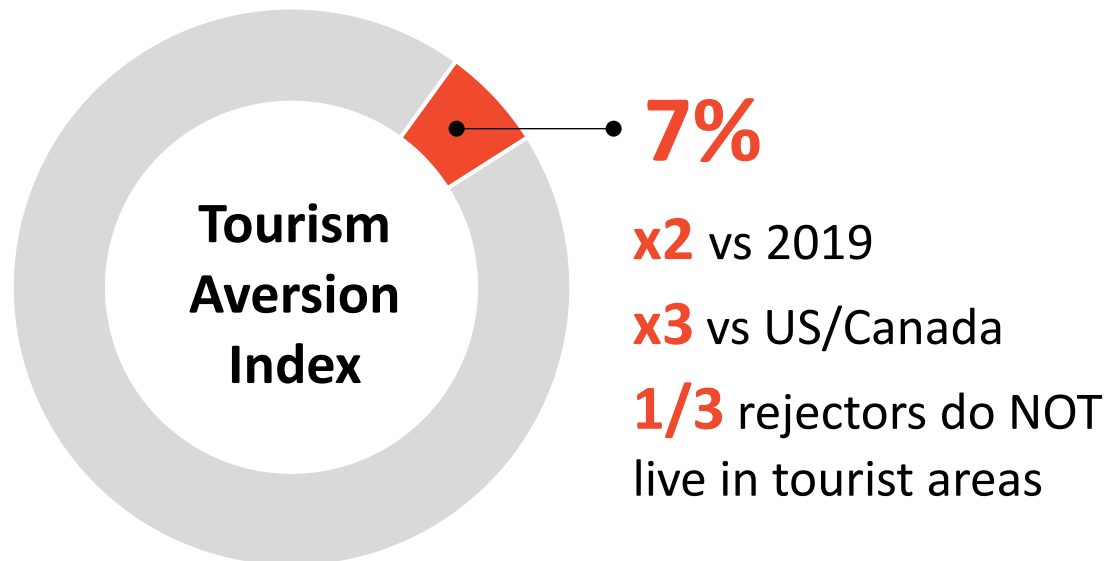




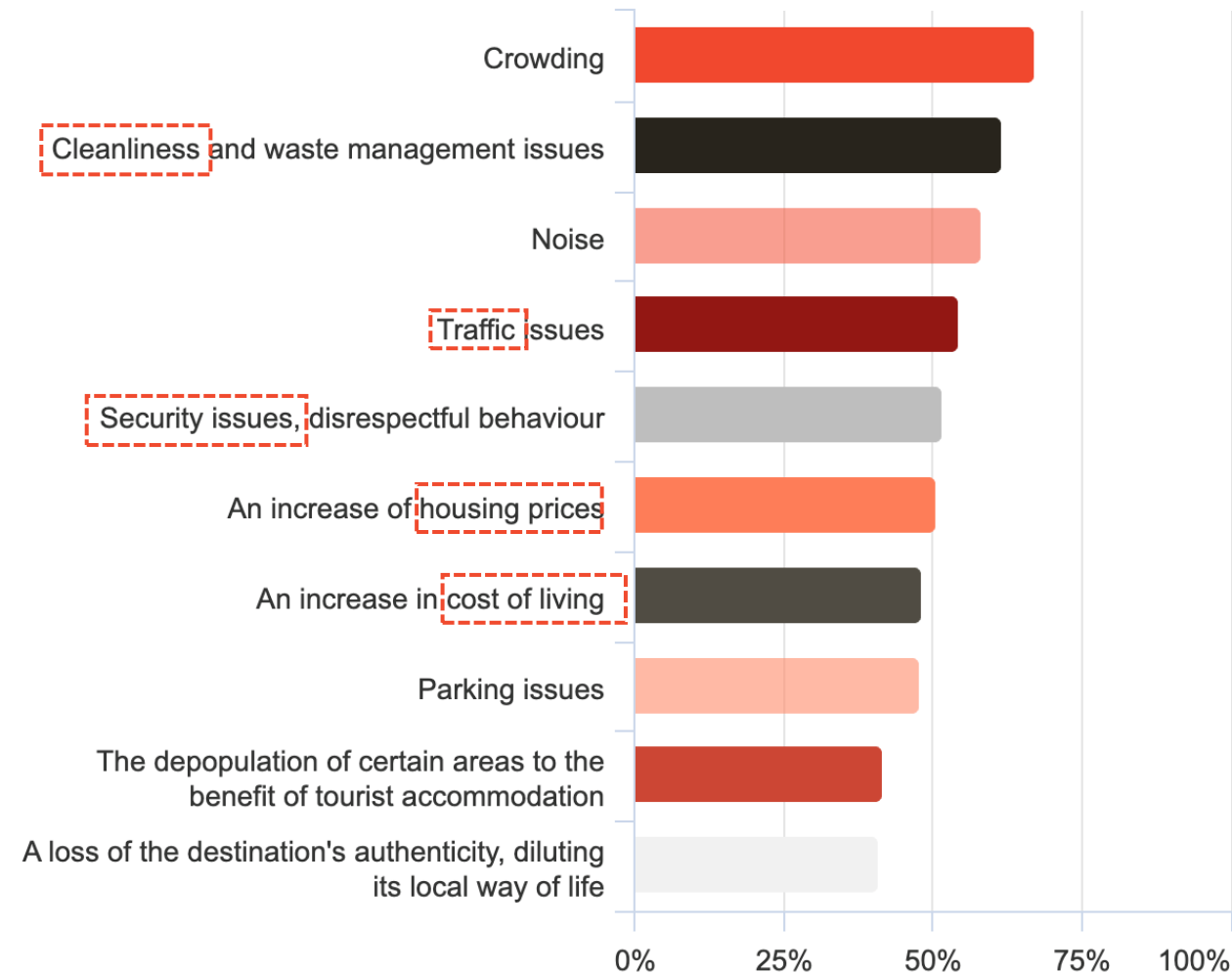
# Tourism hit by Social Polarisation

## CONCERNS EXPRESSED BY RESIDENTS

- Minimal, yet growing **“Tourism-aversion”**
- Caused by (over)tourism and **non-tourism factors**
- **1/3** of residents **do not feel considered** by tourism policy-makers
- Rising risks of **tourism weaponization**



## Tourism Nuisances perceived

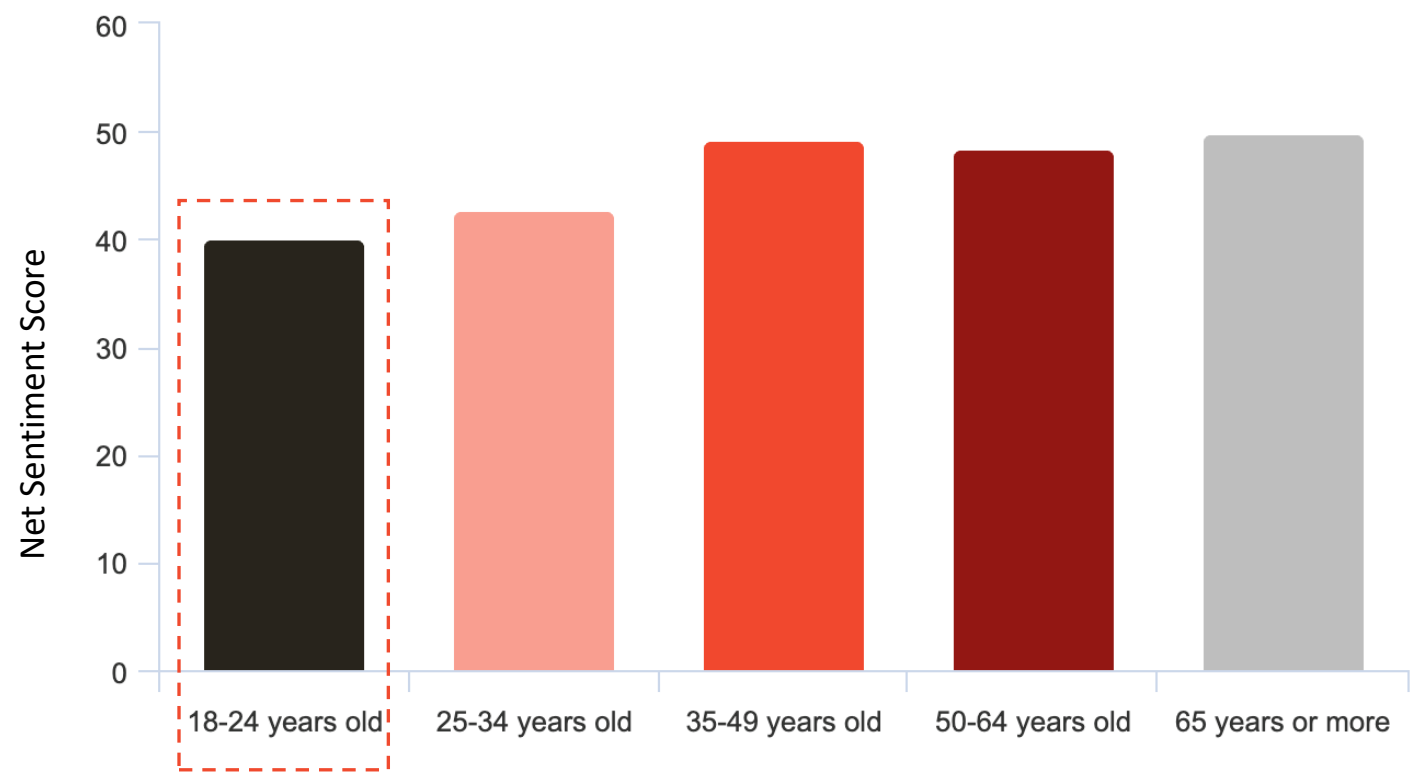


# Tourism hit by Social Polarisation

CONCERNS EXPRESSED BY RESIDENTS

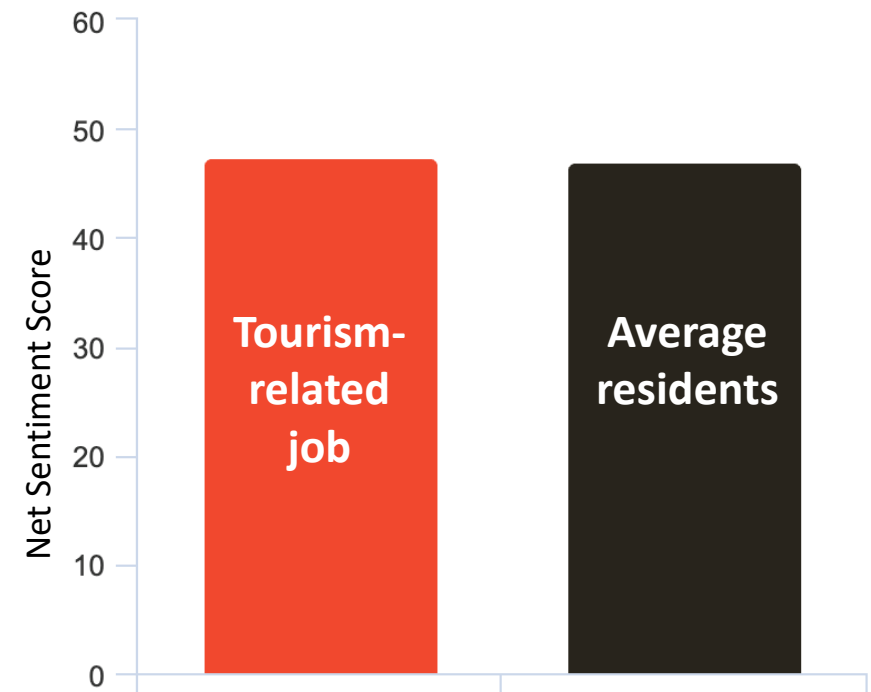
## Generational divide

Cultivating tourism support among youth is **needed**



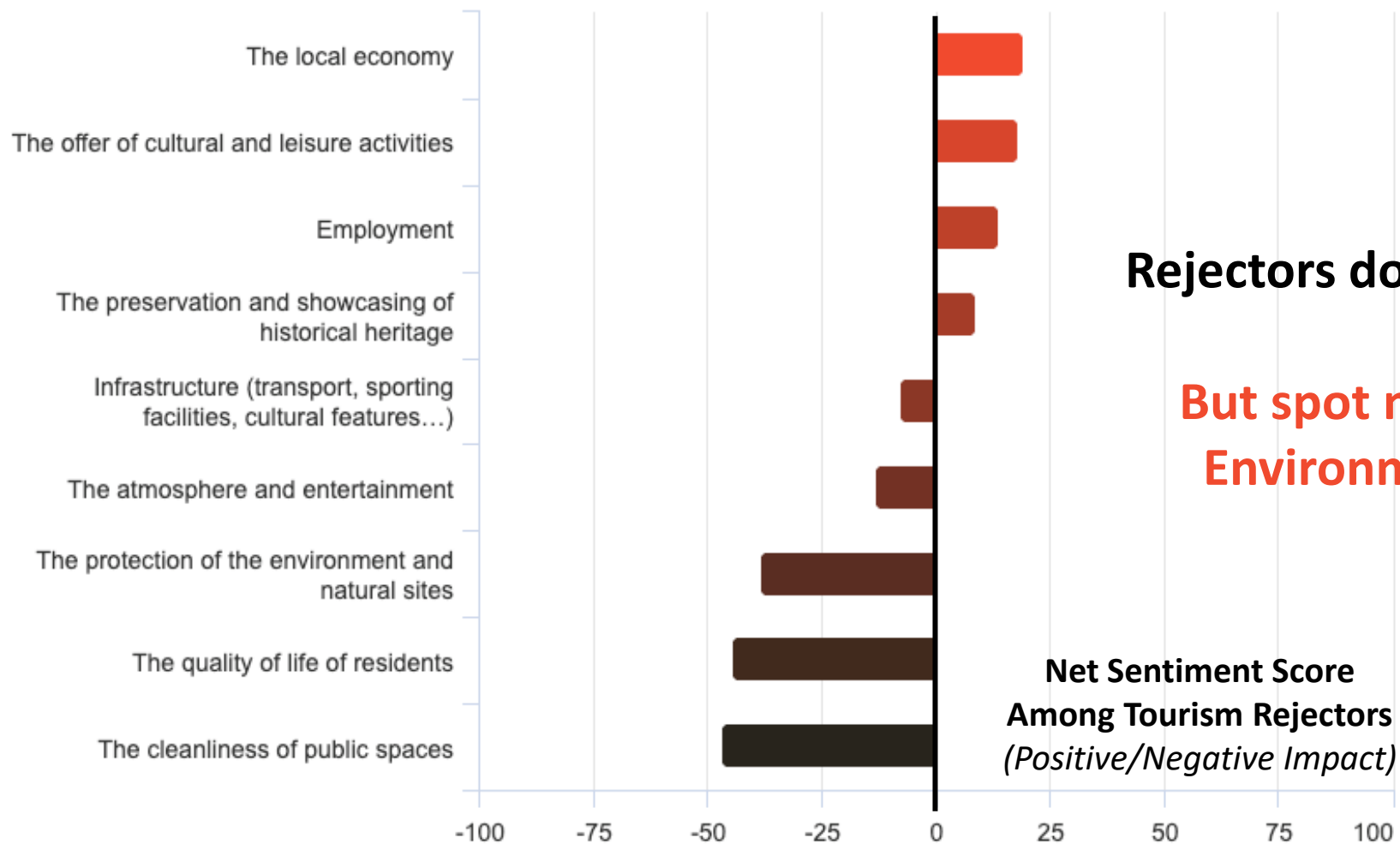
## Is the sector self bashing?

Cultivating tourism pride among professionals is **needed**



# What drives negative Sentiment

IMPACT PERCEIVED BY TOURISM REJECTORS



**Rejectors do value benefits of Tourism**

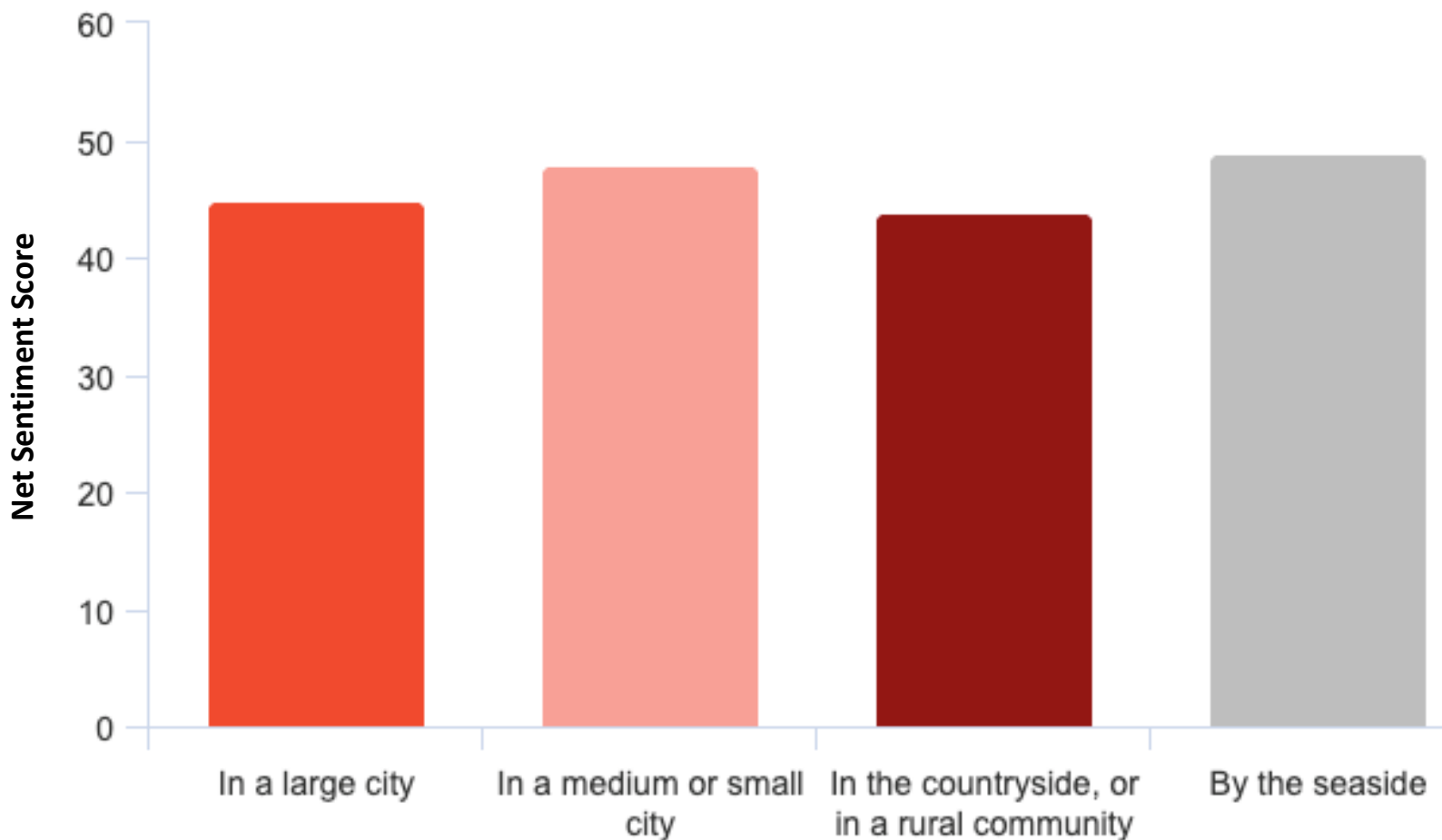
**But spot negative impact on their Environment and Quality of life**

**Net Sentiment Score  
Among Tourism Rejectors  
(Positive/Negative Impact)**



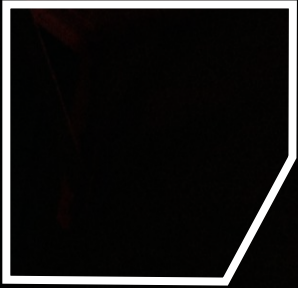
# Finding the “Sweet Spot” of Carrying Capacity

REGARDLESS THE TYPE OF ENVIRONMENT RESIDENTS LIVE IN



**The sentiment is generally positive across all types of destinations**

**Challenges can start in places where tourism has grown too fast regardless the type of environment**



# Personas

SPOTTING 8 TYPICAL ATTITUDES AMONGST RESIDENTS IN EUROPE

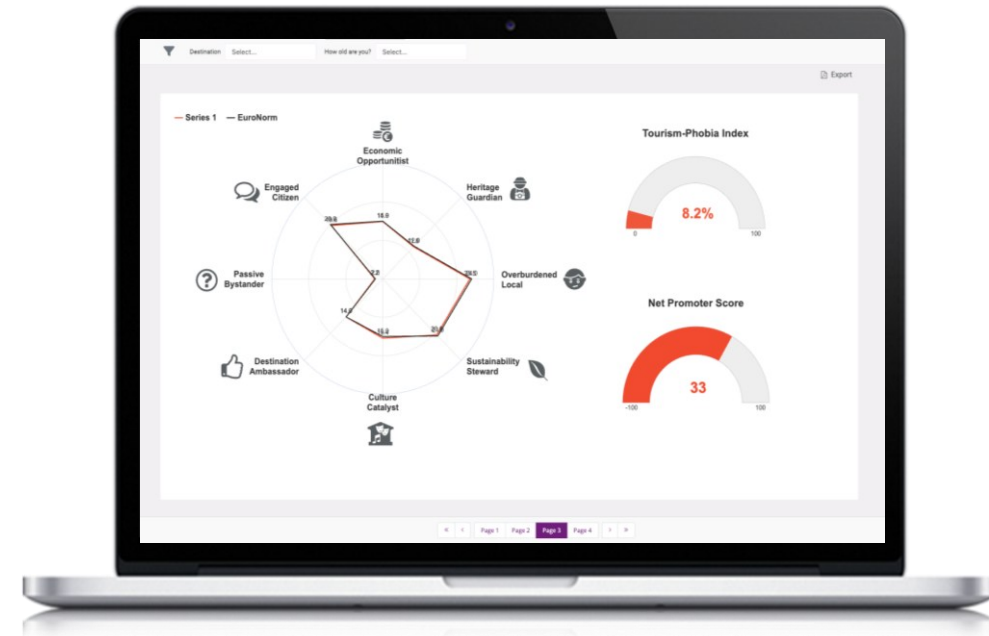


# Summarizing the State of Sentiment

THROUGH PERSONAS

## 8 typical attitudes defined

- Based on 80+ resident sentiment projects (**100K+ interviews**)
  - Identifying Personas **under / over-represented** in cities, compared to a desired “well-balanced” situation
  - Profiling **who they are** and **what they think**
- 
- **Engaged** Citizen
  - **Economic** Opportunist
  - **Heritage** Guardian
  - **Sustainability** Steward
  - **Culture** Catalyst
  - Destination **Ambassador**
  - **Quality-of-Life** Guardian
  - Passive **Bystander**





# Personas' Presence in Europe

## KEY SENTIMENT PATTERNS

A strong desire to engage and develop attractive sustainable places to visit and to live in.

*My voice to shape our tourism policy*

*Eco-conscious tourism policies that align with my neighborhood's sustainability efforts*

*Tourism is great, but watch its impact on my quality of life*



# Case 1: Destinations “under pressure”

PERSONAS ANALYSIS

## Scenario “At Risk”

Reputation risks requiring actions.  
But still high levels of community’s  
pride and engagement to leverage

— Destinations  
“under pressure”  
— Avg Europe



# Case 2: A Nordic Destination

## PERSONAS ANALYSIS

### Scenario “Open to co-create”

Large potential for co-creating local businesses, events and visitor experiences holding strong international, multi-cultural vibes

— A Nordic Country  
— Avg Europe





# Conclusion

WHAT ROLES FOR NATIONAL TOURISM ORGANISATIONS?





# Closed for Maintenance, Open for Voluntourism

Tourism is becoming a problem many places in the world. But in The Faroe Islands they found a simple yet effective solution.

The Faroese Prime Minister announced that the country would be 'closed for maintenance'. Instead he invited volunteers to come and help maintain the islands.

It became a global news story and within four days, people from all over the world signed up to help as volunteers to work side by side with the locals to build the much-needed infrastructure.

Today the top ten sights have all been improved, simply by turning tourism into voluntourism.



Visit Faroe Islands  
Official Tourist Board of the Faroe Islands