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Exploring how to understand resident sentiment in Tourism

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Contents

Introduction	4
Section 1: Literature Review	5
Summary	5
Theory	7
Method	23
Conclusion	27
Section 2: Case study	28
Summary	28
Introduction	28
VISITFLANDERS strategic aims	30
Resident Surveys	33
Resident Engagement Examples	37
Summary	40
Section 3: Stakeholder interviews	42
Granularity of data	42
Customisation	43
Benchmarking	44
Communication of data	45
Nature of data	45
Resident engagement	46
Summary	47
References	48

Table 1 (Prayag et al. 2013, p. 635).....	11
Table 2 (Rua 2020, p. 169)	13
Table 3 Figures taken from Hadinejad et al. (2019)	15
Table 4 (Boley and McGehee 2014)	19
Table 5 (Neuts et al. 2021).....	22

Figure 1 The Linden Tree explains how VisitFlanders envision a flourishing destination..... 31
Figure 2 A post taken from the Ask Antwerp Facebook page 37

Introduction

At the start of 2020 Visit Wales published a strategic document [Welcome to Wales](#) which details the priorities for the visitor economy from 2020 – 2025. In this document Visit Wales detail commitments to improve the visitor economy in Wales through a number of different approaches, including monitoring and analysing resident attitudes.

This will allow Visit Wales to gather a deeper and more meaningful understanding of the motivations, experiences, and impressions felt by residents which can help inform policy, improve service provision, and enhance the overall experience of visiting and living in Wales.

Understanding Resident Experience can help Visit Wales provide valuable insight at the national level into the impact our policy decisions have on people, and how changes in visitor behaviour impact people living in those areas. At the Regional and Local Authority level this type of intelligence can help inform investments, strategic planning, and on the ground operations leading to shorter delays between communication of problems and implementation of solutions.

As discussed in 'Welcome to Wales', Tourism is a highly transverse industry that intersect the economy of a destination with its environmental sustainability, its sense of community and its heritage and culture. As part of our commitment to understanding the drivers of positive visitor experience, brand the knowledge of resident sentiment and the interrelation with visitor sentiment is relevant for both the well-being of local communities (from an economic and non-economic perspective) and for the development of tourism in a sustainable manner that is advantageous for residents alongside visitor populations.

The purpose of this paper is to:

- Present findings from the literature currently available on resident sentiment in relation to tourism,
- Present a case study of a location that has successfully deployed a resident attitude measurement approach, and

- Present findings from a round of stakeholder interviews conducted to ascertain desirable factors for a Visit Wales approach to measuring resident sentiment.

Section 1: Literature Review

This section will explore recent trends and theories, as well as methodical approaches and issues, with the aim of ascertaining which key variables should be considered when undertaking work on a resident tourism survey or resident-focused tourism project. There is a wealth of literature available within tourism studies on this topic, so to narrow scope this paper focuses largely on peer-reviewed journal papers and texts published within the last twenty years, with a core focus on the resident. The below is structured into three main sections: firstly a brief introduction to the importance of understanding resident sentiment, secondly a look at the main theories in the literature, and thirdly a review of the methods utilised in resident sentiment studies thus far.

Summary:

1. If tourism strategy is concerned with the principles of sustainability the resident needs to play a central role in decision-making processes. Simply measuring resident sentiment is not sustainable practice, instead the resident needs to be integrated into the tourism process. There are multiple ways to do this.
2. Social exchange theory has been the go-to explanatory model for a long time in resident sentiment studies. However an increasing number of papers are proving it ignores some of the key drivers behind resident sentiment. As such other approaches and theories have been put forward in the literature – but these have tended to be applied sporadically (e.g. in an experimental way) so have yet to be proven as trusted models.
3. There is an increasingly strong shift towards focusing on empowerment as a key variable in resident attitudes towards tourism. This paradigm shift forces the industry to concentrate on involving the resident rather than simply surveying them. The Resident Empowerment Tourism Scale (RETS)

approach has forced academics to consider more experimental, community-based, cooperative approaches.

4. Quantitative methods seem to be preferred in both the field and literature. However, the literature does strongly advocate for the qualitative approach if a more nuanced understanding of the issues in a specific area is required.
5. There is a lack of focus on communicating findings in the literature. Collaborative and participatory approaches offer some hope here; their focus on involving the resident in tourism processes should (when done well) result in a constant stream of multi-directional communication between resident and government.

1. Why measure resident sentiment

From an industry approach, residents are an important part of the 'product' being sold to the visitor of any given place. Their attitudes and behaviours towards the visitor play a central role in how the visitor determines a destination is welcoming or friendly, affecting overall tourism satisfaction levels, reviews, and repeat visit numbers. This is sometimes referred to as the effect of the 'happy host' (Snaith and Haley 1999). Visitors also often cite wanting an 'authentic' experience as part of their agenda. The resident is ubiquitously part of this authenticity, whether directly (through providing experiences for the visitor) or indirectly (through simply a welcoming attitude).

Equally, negative resident sentiment towards tourism can spill over into the visitor experience. If visitors cannot access local experiences and are made to feel unwelcome the likelihood of return or recommendation is slim. The very visible community backlashes experienced in Europe demonstrate what can happen when residents believe their opinions on tourism are not taken into consideration. Venice and Barcelona are two examples of this; over-tourism in these cities has led to overt backlashes and social unrest in the form of protests and 'tourists go home' graffiti in visitor hotspots.¹ Other cities followed, leading to websites compiling lists of popular

¹ [Media coverage of tourism protests in Europe \(BBC News\)](#)

European cities to avoid as they became angry hotspots.² To avoid getting to this stage, DMOs, local councils, and national governments need to have the mechanisms in place to listen to residents. Understanding resident voice helps to build policies which minimise the potential negative impacts and maximise the potential benefits – in turn leading to greater support for future projects (Prayag et al. 2013; Styliadis et al. 2014).

Unsurprisingly there is a strong awareness of the importance of the resident in the tourism literature. The literature currently places the resident as key to sustainable tourism practices, with resident support seen as essential to realising the long-term sustainable development of the industry (Gursoy and Rutherford 2004; Hadinejad et al. 2019; Liang et al. 2021). Some argue that any tourism system not placing residents as key stakeholders will ultimately fail (Haahti 2001; Easterling 2004). The UNWTO stress that it is important to understand that sustainable tourism practice is not just about environmental factors, but also about ensuring respect for the ‘socio-cultural authenticity of host communities’ (UNWTO 2005). Therefore, capturing resident voice is seen as central to understanding the socio-cultural impacts of tourism development, and ensuring the principles of sustainable tourism are met.

Theory

Given the resident’s centrality to sustainable practice, there is now a sizable (and still expanding) body of literature focusing on the best way to understand and assess resident sentiment (Nunkoo et al. 2013; Sharpley 2014; Hadinejad et al. 2019). According to McGehee and Andereck (2004), by the early 2000s the resident had already become one of the most systematically researched areas in tourism studies. This popular sub-field has utilised case studies and data from all over the world, in an attempt to pinpoint the key variables that affect resident support for tourism development. In doing so it has experienced several paradigm shifts; ranging from Doxey’s one-way irritation index (which suggested as visitor numbers rose residents

² See: [Tourist Hotspots that are best avoided \(The Culture Trip\)](#) or [Summer lovin'? Not in angry Europe's tourist hotspots \(Times of Malta\)](#)

went through four stages of emotion), to the current day theories on empowerment (which argue for the value of co-creation) (Boley and McGehee 2014).

Whilst this body of work has been able to provide a strong base for theoretical development in tourism studies, there remains a heated debate over what should be measured and how; as Liang et al. (2021, p. 3310) write, 'paradoxically, the more empirical studies accumulate, the less a consensus is reached'. It is generally agreed that the variables of importance fall into three key categories: sociocultural, economic, and environmental, and that variables in each of these can be identified as having a positive or negative impact on the resident (García et al. 2015). However, within these categories there are an infinite number of variables which can be measured, and multiple ways of measuring them, hence the lack of consensus. Many still believe the deep-rooted factors which affect residents have not been addressed, so continue to turn to experimental methodologies and theories to find a more appropriate model. It would be impossible to address every variable and approach taken in this paper. Therefore, the following section explores some of the most popular theories and methods, and provides some examples of how some studies have utilised them. It is important to note that other fields (such as psychology) have made useful contributions towards resident sentiment and tourism impact (for example; Linderová et al. (2021)), but for the sake of succinctness the below largely focuses on the literature found in tourism studies.

A systematic review and content analysis of resident sentiment studies by Hadinejad et al. (2019) found that just over 44 percent of papers did not utilise a theoretical approach. This contrasts with Nunkoo et al. (2013) review that atheoretical papers outweighed theoretical, suggesting that the area is slowly becoming more theorised over time. Amongst the papers that utilise theory, social exchange theory (SET) is by far the most dominant (Sharpley 2014). Hadinejad et al.'s (2019) study confirms this; they found that 44.6% of theoretical studies across the four major tourism journals utilised social exchange theory to explain resident sentiment. Therefore this section begins by looking at the efficacy of this theoretical approach.

SET: Social Exchange theory (SET) is commonly understood as an extension of traditional economic exchange theory. Its explanatory powers make it appealing to both policy makers and academics. SET is a behavioural theory which positions exchanges as a way to understand and predict attitudes. Exchanges can be between individuals, organisations, or governments. Within tourism studies it is used to explain the residents' behaviour towards the visitor and tourism development. Resident support (and the extent of their future support) is dependent upon the perceived costs and benefits of the local tourism industry. Residents will engage in an exchange (offer support) if they perceive the benefits will outweigh costs (Stylidis et al. 2014). Essentially the theory posits that resident opinion is rooted in an exchange relationship, whereby the resident anticipates the profits of their interactions with the visitor or support for tourism development, and acts accordingly (Lee 2013; Bimonte and Faralla 2016). Profits aren't limited to economic values, there can also be socio-cultural and environmental profits (Andereck and Vogt 2000; Harrill 2004).

SET Examples: Prayag et al. (2013) combine the theory of reasoned action with SET to study resident support of the 2012 London Olympic Games. They argue that sporting mega events are one of the fastest growing segments in the tourism industry, yet their sustainability is fully dependent on the host community's support (Prayag et al. 2013, p. 629). Their study utilises a questionnaire approach, which aims to understand the core resident attitudes to the 2012 Games; the perceived impacts of the games (cost v. benefit), and the extent of resident support. Respondents rated their level of agreement/disagreement with a range of statements (see table 1 below for list of these statements). Prayag et al. (2013) utilise the popular triple bottom line approach (TBL) in their measurement and analysis; an understanding that for tourism development to be sustainable it must focus not only on traditional economic strategy, but also social and environmental strategy (Stoddard et al. 2012). Their results find that overall attitude plays a mediating role between perceived impacts (socio-cultural, economic, and environmental), and support for the 2012 Games (Prayag et al. 2013, p. 329). They highlight for future researchers that their study shows the importance of distinguishing between attitude and support.

Variable studied	Indicators used in questionnaire
Perceived positive socio-cultural impacts	<p>The Games will bring the London community closer</p> <p>The Games will provide residents a chance to meet new people</p> <p>The Games will foster pride among London residents and British people</p> <p>The Games will promote London as a multi-cultural destination</p> <p>The Games will provide residents relaxation and entertainment</p> <p>The Games will strengthen local community bonds and cohesion</p>
Perceived negative socio-cultural impacts	<p>The Games will disrupt residents quality of life</p> <p>The Games will lead to overcrowding of local facilities</p> <p>The Games will increase crime</p>
Perceived positive environmental impacts	<p>The Games will improve environmental conservation and protectionism</p> <p>The Games will raise environmental awareness</p> <p>The Games will stimulate planning and administrative controls such as recycling policies and pollution controls</p>
Perceived negative environmental impacts	<p>The Games will damage the natural environment</p> <p>The Games will increase noise pollution</p> <p>The Games will increase visual pollution</p> <p>The Games will increase littering</p> <p>The Games will increase air pollution</p>
Perceived positive economic impacts	<p>The Games will provide locals employment opportunities</p>

	<p>The Games will improve the provision of public services and infrastructures</p> <p>The Games will increase business opportunities</p> <p>The Games has led to the regeneration and redevelopment of towns and cities</p> <p>The Games will enhance London's international reputation through world media exposure</p> <p>The Games will improve London's image worldwide</p> <p>The Games will promote London as a tourist destination</p>
Perceived negative economic impacts	<p>The Games has led to increased tax rates for London residents</p> <p>The large investment required to host the Games cannot be justified in terms of the economic benefits that will be generated for residents</p>
Overall attitude towards the games	<p>Overall, I am excited about London hosting the 2012 Olympic Games</p> <p>Overall the Games positive impacts will outweigh its negative ones</p>
Support for the games	<p>I support the 2012 Olympic Games as a resident</p> <p>London should bid for other major sporting events</p>

Table 1 (Prayag et al. 2013, p. 635)

In a very different study Rua (2020) utilizes the SET model to understand residents' attitudes in Girona (a city in Northern Catalonia). Rua (2020) argues that the SET framework is malleable and can be used to look at less tangible variables – in this case how the variable of emotion can influence resident sentiment. Like Prayag et al.

(2013) this study also utilizes a questionnaire approach, but Rua also accompanies this with some qualitative in-depth interviews. To study the effect of emotion the study uses the variables of personal benefits, involvement in industry, and attachment to community. These variables are used to understand the perceived positive/negative impacts (costs v. benefits) of the industry, and in turn overall support for tourism (see table two below for the full list of variables studied). Like Prayag et al. (2013) this study also used an agreement scale whereby residents rated how much they agreed or disagreed with a statement. Rua highlights the difficulty of measuring some of these aspects; e.g. non-economic benefits can be difficult to recognize and the lines between personal and community benefit can often be blurry. This is why in-depth qualitative interviews, alongside a questionnaire, can be useful to construct validity. Rua) finds that there is overall support for tourism when the perceived benefits outweigh costs. Like Prayag et al. (2013), this isn't a particularly revelatory finding. What is more interesting is that Rua's mixed method approach (the use of interviews) suggests that the factors of proudness and increased interactions with visitors strongly affect resident sentiment towards tourism in Girona.

Variable studied	Indicators used in questionnaire
Support for tourism	Tourism is one of the most important industry for my community Tourism helps my community grow Tourism helps my community grow in the right direction Tourism plays an important economic role in my community I am proud that tourists are coming to my community I support the development of tourism as it is vital to my community My community should try to attract more tourists
Perceived negative impacts from	Increased prices of goods and services

tourism	<p>Increased prices of rents</p> <p>Increased noises</p> <p>Increased congestions</p> <p>Arousal of souvenir shops and cafes aimed at tourists instead of establishments aimed at locals</p>
Perceived positive impacts from tourism	<p>Increased employment opportunities for locals</p> <p>Increased opportunities for local businesses</p> <p>Improved appearance of the city</p> <p>Increased opportunities for leisure</p> <p>Increased opportunities for socializing</p>
Attachment to community	<p>Length of residence</p> <p>Feelings of moving away</p> <p>Feeling of being “at home”</p> <p>Interest on what is going on</p>
Involvement in the tourism industry	<p>Level of knowledge about tourism development in Girona</p> <p>Level of knowledge about tourists in Girona</p> <p>Level of knowledge on tourism impacts</p> <p>Development of friendship with tourists</p> <p>Frequency of visitation to tourism areas</p> <p>Involvement in decision-making process</p>
Personal benefits from tourism	<p>Meet more people and learn from other cultures</p> <p>There are more bars and restaurants I can go to</p> <p>Employed thanks to tourism</p> <p>Tourism contributes to household income</p>

Table 2 (Rua 2020, p. 169)

There is no denying that social exchange theory has made an important theoretical contribution to the field, and its systematic application worldwide has elicited valuable empirical data through which we can compare and contrast the usefulness of different variables (Nunkoo 2016). However, in the last five years SET has experienced a significant push-back in the literature. An increasing number of academics have started questioning the effectiveness of SET to explain resident behaviour in the 21st century. Some posit that the SET approach relies too heavily on the premise that residents are rational decision-makers, able to reliably weigh up the positive (benefits) and negative (costs) of tourism (Hadinejad et al. 2019). There is also question over whether SET is able to elicit the difference between personal and societal benefits. Others argue that the theory continues to be too reliant on economic factors as drivers for tourism support.

Other approaches: This disruption to the dominant theory has led to what Hadinejad et al. (2019, p. n.p.) call ‘a clear and urgent need for the application of new theories and frameworks to investigate the topic.’ Haninejad et al.’s (2019) systematic review found a significant range of alternative frameworks being experimented with (see table 3 below for a list of these). In the next section are two examples which demonstrate how these other approaches have been successfully used to understand resident sentiment.

Theory	Percentage of papers
Social exchange theory	44.6%
Social representation theory	6.2%
Institutional theory	4.6%
Bottom-up spillover theory	4.6%
Place attachment theory	3.1%
Theory of emotional solidarity	3.1%
Cultural theory	3.1%
Weber’s theory of formal and substantive rationality	3.1%
Stakeholder theory	3.1%
Place identity theory	3.1%

Other	21.4%
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Table 3 Figures taken from Hadinejad et al. (2019)

Other approach examples:

Institutional Theory: Sinclair-Maragh and Gursoy (2015), use institutional theory as a framework to study how the variable of imperialism affects resident sentiment towards tourism in Jamaica. In this context the theory can shed light on organisational and political influences on resident sentiment; it can 'explain residents' perceptions of imperialism as a new variable in relation to tourism' (Sinclair-Maragh and Gursoy 2015, p. 154). The study again utilised a questionnaire, followed by regression analysis model. They found that whilst residents' perceptions of political and cultural imperialism have a positive impact on residents attitude towards local tourism, economic imperialism had a negative impact. Sinclair-Maragh and Gursoy (2015) highlight how lessons can be learnt in other developing island countries from their findings; if economic imperialism is a delicate variable, careful consideration should be given to incentivising foreign investors. Hadinejad et al. (2019) suggest that institutional theory could also be used in the future to understand the trust residents have in local institutions involved in tourism development. Nunkoo et al. (2012) have partially done this in studying how interpersonal trust, resident power, and perceived performance are determinants of political trust in tourism institutions.

Bottom-up spillover theory: Bimonte and Faralla (2016) utilise bottom-up spillover theory to better understand the relationship between tourism and host community's perceived life satisfaction. According to Bimonte and Faralla (2016) the variable of wellbeing has been ignored in the literature; they accurately point out that whilst previous studies have identified a range of variables which 'may influence the way in which tourism related impacts are perceived', they haven't ascertained how these perceptions map onto personal wellbeing or quality of life (Bimonte and Faralla 2016, pp. 200-201). Spillover theory is adopted as it is able to explain the relationship between different life domains (e.g. the sub-domains of social life, health, education) and overall life satisfaction. Hence Bimonte and Faralla (2016) aim to elicit how the impacts of tourism affect different life domains, and overall perceived wellbeing or life satisfaction. The study used a two-step questionnaire which measured changes in perceived wellbeing through different tourist seasons in Follonica, a popular tourist destination in Tuscany. Combining this method with the explanatory model of spillover theory, produced results which suggested a dual phenomenon. Despite

residents being aware of the economic benefits of the busy tourism season, this season was perceived as a factor which negatively affected their general wellbeing. This calls into question the positive link that is often sought by tourism developers or policymakers between local economic growth and tourism. Residents were fully aware of the accrued economic benefits of the season, but still perceived their overall wellbeing as in decline. Bimonte and Faralla (2016, p. 206) thus suggest that 'monitoring subjective well-being patterns' could be utilised as a way to evaluate policies.

The issue thus far with these 'other' approaches does not lie in their effectiveness, but simply that they have not been applied enough times to be proven models. Every approach – bar SET – has been applied in an experimental way, meaning at the moment the application of other theories is simply too sporadic. There is one exception to this. Post-2010 there has been a significant paradigm shift in the resident literature, whereby studies have started to systematically consider empowerment as a key factor in resident sentiment.

Empowerment paradigm: empowerment has been understood as a central tenant in sustainable tourism practice for a while (Sofield 2003; Cole 2006; Wani et al. 2022). It is argued that in order to bring maximum possible benefit to the resident a destination needs to include (empower) said resident in the tourism processes. Writers in this area are staunch in their opinion that if the resident is not included from an early stage in tourism development processes, the tourism product will not be sustainable (Boley and McGehee 2014). As Choi and Murray (2010, p. 589) write 'if the government fails to empower residents, the success of tourism development and sustainability cannot be guaranteed.' This recent paradigm shift has attempted to move conceptual understandings of empowerment and find a way to systematically quantify the extent to which residents feel empowered (or not) by tourism. This isn't easy given empowerment is a largely intangible variable, and often contextualised in different ways by different destinations.

As part of this shift, the residential empowerment tourism scale (RETS) has emerged from the literature, and is now being used with increasing frequency. RETS' key aim

is to recognise and deconstruct different drivers for resident support by understanding how residents see themselves as empowered or disempowered by tourism. To do this it measures three main factors: social empowerment, political empowerment, and psychological empowerment. Social empowerment refers to how the resident perceives tourism as increasing their sense of community; tourism is seen as a tool for increasing their connection to their local community. Psychological empowerment refers to how residents' pride in their home is enhanced through tourism; self-esteem is enhanced through outsiders recognizing the value of their home. Political empowerment refers to if residents feel as though their feelings and opinions on tourism are listened to and acted upon; community members feel fairly represented and have a perceived sense of mastery over their affairs (Boley and McGehee 2014). There are multiple ways to apply this scale as the examples below demonstrate.

RETS example: One of the first to use the RETS approach, Boley and McGehee (2014) attempt to prove the validity of the scale in their study. They apply the scale to a pilot, then a pre-test study, before focusing on a full case study of three areas in West Virginia. Like other examples here they utilised a questionnaire to collect their data. This questionnaire was developed in the pre-test stages with local residents and tourism officials, before piloting it, and then conducting a large-scale rollout. Table four below shows the questions used the final questionnaire.

Variable studied	Indicators used in questionnaire
Psychological empowerment	Tourism in Floyd/Franklin/Botetourt County... <ul style="list-style-type: none"> - Makes me proud to be a Floyd/Franklin/Botetourt County resident - Makes me feel special because people travel to see my county's unique features - Makes me want to tell others about what we have to offer in

	<p>Floyd/Franklin/Botetourt County</p> <ul style="list-style-type: none"> - Reminds me that I have a unique culture to share with visitors - Makes me want to work to keep Floyd/Franklin/Botetourt County special
Social empowerment	<p>Tourism in Floyd/Franklin/Botetourt County...</p> <ul style="list-style-type: none"> - Makes me feel more connected to my community - Fosters a sense of 'community spirit' within me - Provides ways for me to get involved in my community
Political empowerment	<p>I feel like...</p> <ul style="list-style-type: none"> - I have a voice in Floyd/Franklin/Botetourt County tourism development decisions - I have access to the decision making process when it comes to tourism in Floyd/Franklin/Botetourt County - My vote makes a difference in how tourism is developed in Floyd/Franklin/Botetourt Co. - I have an outlet to share my concerns about tourism development in Floyd/Franklin/Botetourt Co.

Table 4 (Boley and McGehee 2014)

As is evident in the table, the RETS approach requires different questions to the SET approach. As such the data collected is very different, Boley and McGehee (2014)

found that residents perceived their levels of psychological empowerment to be the highest, with social and political empowerment needing to improved. This is particularly useful information for policy makers focussed on the location under study. Somewhat more importantly, Boley and McGehee (2014) find the RETS approach to be a valid one. They argue RETS proves empowerment to be a key influencing factor on resident support, with the scale able to help organisations understand ‘whether or not they can effectively label tourism in their community as sustainable’. (2014, pp. 92-93).

In a much more recent study Neuts et al. (2021) utilise the RETS approach to study levels of resident empowerment in the Scheldeland region of Flanders. Like Boley and McGehee they utilise a questionnaire– but here with a specific focus on empowerment in relation to undertourism. Details of the questionnaire can be found in table 5 below. Interestingly Neuts et al. (2021) demonstrate how it is possible to combine empowerment-focused questions with the more archetypal questions prevalent in earlier studies (e.g. questions focusing on economic benefits and overall support). This allows the study look at the effect different types of empowerment have on other variables.

Variable studied	Indicators used in questionnaire
Personal economic benefits	Binary question: <ul style="list-style-type: none"> - Is part of your (family) income linked to tourism?
Psychological empowerment	Ordinal questions: <ul style="list-style-type: none"> - I consider this area to be a tourist destination - Tourism makes me proud to be a resident - Tourism makes me want to tell others about what we have to offer
Social empowerment	Ordinal questions: <ul style="list-style-type: none"> - Tourism creates nice encounters

	<p>with visitors</p> <ul style="list-style-type: none"> - Tourism ensures that we are more connected to each other in our municipality
Political empowerment	<p>Ordinal questions:</p> <ul style="list-style-type: none"> - I can “be heard” in my ideas about tourism development - I have an outlet where I can share my concerns about tourism development
Negative impacts of tourism	<p>Ordinal questions:</p> <ul style="list-style-type: none"> - Tourism results in an increase of the cost of living - Because of tourism there are more traffic issues - In some districts I feel limited in my comfort because of tourists - Tourists are a nuisance
Positive impacts of tourism	<p>Ordinal questions:</p> <ul style="list-style-type: none"> - Tourism development improves the physical appearance of the area (restoration of historical buildings, maintenance and development of parks, streets and squares, etc.) - Tourism offers more shopping and recreational opportunities - Tourism improves the quality of life - Tourism improves the standard of living - The tourist infrastructure is well-maintained

	<ul style="list-style-type: none"> - Tourism brings more liveliness in my municipality
Support for tourism	<p>Ordinal questions:</p> <ul style="list-style-type: none"> - In general, the positive benefits of tourism outweigh the negative impacts - I support tourism and want to see it remain important - We should remain a tourist destination - We should support the promotion of tourism

Table 5 (Neuts et al. 2021)

Neuts et al. (2021) utilised a partial least squares structural equation model to analyse the data. The results found that support for tourism was heavily influenced by all three areas of empowerment, with economic factors not significant. Neuts et al. (2021, p. 6934) argue their findings demonstrate that 'locals should be embedded explicitly in the governance structure of the tourism development strategy.' Interestingly they also found that the areas with lowest levels of tourism were least supportive of development, suggesting that as tourism grows so does the general awareness of its benefits.

Whilst the RETS approach is still relatively young, and in many cases still experimental in its application, what it has crucially done is highlight that previously assumed important variables (e.g. economic gain or employment in industry) may not be as relevant to 21st century residents. The resident protests experienced in many European cities are a clear indicator that in the 21st century residents need to be, and want to be, more involved in local tourism strategies and processes. Empowerment therefore needs to be considered as a key variable. RETS as a model offers a way to measure this variable.

Method

As is evident in the example studies used thus far, this is a field heavily dominated by the quantitative approach (Nunkoo et al. 2013). In their systematic review of the field Hadinejad et al. (2019) found 83% of resident-focused studies relied on a quantitative approach for data collection. They found a further ten percent utilised mixed methods, but these studies tended to employ a sequential design whereby qualitative methods were employed for exploratory stages, followed by quantitative methods for the bulk of data collection (Hadinejad et al. 2019). Boley and McGehee's (2014) study is a good example of this; they use qualitative methods for the pre-test stages, choosing to work cooperatively with residents to design and test the survey, before rolling it out on a larger, quantitative scale. This quantitative dominance is hardly surprising given the measurable data preferences and application of DMOS, local councils, and government departments. Some also argue that quantitative approaches create more theoretically grounded studies, for it is easier to prove internal and external validity (Rua 2020). As is the case with all the studies looked at here, most quantitative work utilises a large-scale survey/questionnaire approach, followed by regression analysis. Statistical techniques such as structural equation modelling, the t-test, and confirmatory factor analysis have been popular for analysis stages (Nunkoo et al. 2013; Prayag et al. 2013; Hadinejad et al. 2019).

Despite this dominance, there are increasingly loud calls within the literature for a shift away from this quantitative dependence (Deery et al. 2012). Hadinejad et al. (2019) argue that 'there remains a need for further use of alternative methods', whilst Deery et al. (2012) argue current understandings of the resident are stunted by solely quantitative approaches – we thus risk limiting our understanding of the deep-rooted impacts tourists are having on residents. Rua's (2020) work is a good example of this; by combining qualitative in-depth interviews with a quantitative survey, the variable of emotion is able to be studied in a much more resident-informed and nuanced way. Other qualitative methods used to study the resident have included Q method and thematic analysis (for interviews), and social media analysis (Hunter 2011; Hunt and Stronza 2014; Hadinejad et al. 2019). It is clear that those who have utilised qualitative approaches have been able to elicit richer data,

more competent at explaining and exploring the less explicit aspects affecting resident sentiment.

Some other qualitative studies have looked to methods found in anthropology and ethnography to study resident sentiment. Xue and Kerstetter's (2017) work with the residents of Chongdu Valley (China) is a good example of this. Their study utilises mixed methods (ethnography and discourse analysis) to explore the relationship between private tourism development and residents. Chongdu Valley is a popular tourist destination; so much so that 95% of residents work in tourism-related industries. The authors' ethnographic approach led to data being collected through interviews, participant observation, and informal conversations. This data was then combined with any written materials available – i.e. annual reports, planning documents, promotional texts, and speeches. Discourse analysis allowed them to focus on the recurring linguistic patterns in the data – allowing details around the 'values, theories, and attitudes of different social groups' to shine through (Xue and Kerstetter 2017, p. 758). The authors stress how a focus on language rather than actions can elicit more genuine data; discourse analysis has the 'ability to identify the interplay of differing perspectives in spite of surface consensus and agreement' (p.760). Consequently, their findings revealed that private tourism companies and residents had divergent and often conflicting ideas around tourism development issues, despite a surface-level consensus. For Xue and Kerstetter (2017, p. 766), the results confirmed that community participation in tourism 'planning, development, and management' are essential to any sustainable tourism policy.

Interestingly, in spite of these ever-more-frequent calls for resident participation to be central to tourism strategy, there is yet to be any sort of consensus on how best to deliver participatory models. At present two suggestions can be elicited from the literature; citizen ethnography and co-creation.

Ethnography is frequently employed by tourism researchers; Frohlick and Harrison (2008) and Matthews (2018) both provide introductions to the many ways ethnography can be employed in tourism studies. One of these ways is citizen ethnography. It is a participatory approach whereby the traditional ethnographic

model is flipped so as the subject becomes the researcher of the social phenomena at hand. Essentially the resident becomes the ethnographer in a study of their own community. Whilst this requires the citizen to be trained in the techniques of ethnography, the method provides unrivalled access to the subject, for the citizen is already embedded in the social situation being studied. Badami and Goodman's (2021) paper on citizen ethnography discusses the potential for this approach more widely. They provide an example of how citizen ethnography has been used successfully in rural Australia to address mental health issues in teenagers. In this instance, this ethnographic method resulted in a community-led coalition, able to effectively identify the core drivers behind increasing mental health issues in the area. Badami and Goodman (2021) also usefully highlight that in the citizen becoming the researcher, knowledge stays within the community it is intended to benefit, rather than leaving with an external researcher. This leaves communities better-off when navigating future problems. This aspect is particularly appealing for resident-focused tourism projects concerned with the values of sustainability. With the resident taking the role of the ethnographer, not only will the data collected be more representative of the subject at hand, but the knowledge and skills acquired along the way will be retained and benefit the community for years to come.

The second, much more mainstream, suggestion is co-creation. Within tourism strategy co-creation can be realised in many ways, and is closely linked again to the values of sustainability (Robinson 2008). One example of the co-creative approach can be found in community tourism. In this approach the resident is at the forefront of delivering the tourism project to the visitor. For example, Amsterdam runs a scheme where a tourist can *marry* a local for the day and be shown around the city³. Alternatively in Scotland Scoto are working to exclusively promote community-delivered visitor experiences.⁴ This approach to tourism not only provides the visitor with a more *authentic* experience, but also helps to engage and empower residents in local tourism processes – residents essentially become a key stakeholder. As Lin et al. (2017, p. 441) summarise well, this form of co-creation not only provides hospitality and goodwill to the visitor, but also gives the opportunity to 'co-create

³ [Amsterdam invites tourists to 'marry' a local for a day \(Guardian\)](#)

⁴ [Scottish Community Tourism \(SCOTO\)](#).

value with tourists'. Alternatively, co-creation can be realised at an earlier stage in tourism strategies. For instance, when looking at a resident sentiment survey, co-design with locals can be used effectively to develop the questions, or guide decisions on what variables need to be measured. When done well this should lead to a much more effective survey; one that is representative of the community being studied and from which we can elicit actionable data. Styliadis et al. (2014) highlight that all too often resident surveys are restrictive in their methods; question formats have a tendency to be overly coded and thus aren't capable of capturing a true picture of the issues at hand. For example, the true extent of impacts is difficult to ascertain when respondents are simply given a pre-coded positive or negative statement that they are asked to simply agree or disagree with. A co-design approach, where questions are either trialled with locals or written alongside locals, could avoid these issues.

Whilst crucial to informed-policy making, participatory work doesn't come without its risks. It can often be costly and time-consuming. As Yang and Sung (2016) highlight, this sort of approach needs long-term involvement from multiple stakeholders to build an effective mechanism able to 'consistently trigger [value] co-creation and support transformation'. Further, as Davies and Simon (2012) point out, when done badly participatory work can cause more harm than good in communities; 'research suggests that engagement and participation activities which are poorly executed or fail to take contextual factors into account can generate harms or negative outcomes – for example, unmet expectations can lead to cynicism and further disengagement'. To avoid this Davies and Simon (2012) suggest ensuring the groups used for the participatory stages are as truly representative as possible of the community being studied. All too often invested or elite groups co-opt engagement work. A thorough investigation into the different methods of co-creation would be useful for any government department, DMO, or local council wanting to pursue this participatory approach. Participatory engagement can take the form of online forums, social media surveys, in-person workshops, apps, or focus groups. The decision on what participatory process is best is usually dependent on the socio-cultural make-up of the area being studied.

Conclusion

There is no question that understanding the factors that influence resident support for tourism is critical for DMOs, policy makers, planners, and private businesses alike. Further, if tourism strategy is concerned with the principles of sustainability, the resident needs to play a central role in the decision-making processes. It is clear that today resident empowerment is now a key factor to understanding resident behaviour and attitudes towards tourism. However, measuring this intangible factor isn't easy. If a quantitative survey approach is taken, the RETS method offers some inspiration. If a more qualitative approach is taken, in-depth interviews combined with discourse analysis can help establish levels of empowerment. There is a lack of literature focusing on how to communicate findings, or translate findings into policy-making. Given presentation and communication is key to affecting change this seems like a real gap. Collaborative and participatory approaches offer some hope here. Not only do participatory models (such as co-creation, co-design, or peer-led research) empower residents by democratising local tourism processes but, when done well, should also result in a mechanism capable of providing a constant, multi-directional stream of communication between resident and government. Given that two of the five ways of working under Wales' 2015 Well-being of Future Generations Act are *collaboration* and *involvement*, Wales' tourism strategies and processes need to ensure they continually strive to empower and involve the resident. Considering the changing policy environment that will impact on tourism in Wales (e.g. the second home ownership tax changes and the consideration of the Visitor Levy), it is appropriate to ensure the mechanisms are in place to understand not just how to survey residents, but also work collaboratively with them to ensure the sustainability of Wales as an attractive visitor destination for generations to come.

Section 2: Case study

Flanders, Belgium

Focus: how Flanders have integrated residents into their tourism strategy

Summary

1. Listening needs to happen early, otherwise strategy becomes reactive rather than proactive. How we listen (i.e. survey methodology) greatly affects what is learnt and what is actionable.
2. More tourism is not better tourism; focusing on quality rather than quantity yields a more sustainable model with tangible economic, social, and cultural benefits for the destination.
3. To realise sustainable tourism policy, it is important to look beyond just environmental factors and recognise the crucial role of the resident.
4. The ability of Wales to deliver a 'warm welcome' is dependent upon their residents. Therefore, resident engagement needs to play a central role in tourism strategy.
5. There are benefits to be had in widening accessibility policies to encompass both the tourist and the resident.

Introduction

The case study is a common research tool in tourism studies.⁵ The method provides a more contextualised understanding of how policy can work in practice; it is able to give us a window into how others have tackled issues in a real-life setting. Here it allows understanding of how another area has utilised resident sentiment in their tourism strategies and practices. Given Wales has yet to gather data on resident

⁵ See: [Case studies in tourism research: A state-of-the-art analysis](#) or [Case Study as a Research Method in Hospitality and Tourism Research: A Systematic Literature Review](#)

attitudes to tourism, the case presented here gives opportunity to reflect on the pros and cons of different methods, identify opportunities, and consider any risks involved.

The historically narrow focus on tourism as an economic driver for growth has led to rapidly growing visitor numbers across Europe. This has brought pressures on local services and infrastructure, affecting residents' everyday lives. Yet in tourism, residents are a crucial part of the product. An unwelcoming resident population will negatively affect visitor experiences and reviews, and impact both new and repeat visit numbers. The 2019 Wales visitor survey found that one of the key drivers in tourist satisfaction (with both UK and overseas visitors) was the *feeling of welcome*. But Wales' welcoming identity will quickly dissipate if tourist numbers increase and there isn't the adequate infrastructure in place to understand resident sentiment.

This case study is structured in three parts. Section one looks at how Flanders have considered residents in their tourism strategies and policies. Section two looks at the resident-focused surveys they have undertaken. Section three gives some examples of resident-focused tourism projects. Flanders has been chosen as the object of study primarily because of their innovative and unique approach to tourism strategy. In Flanders, tourism is seen as tool for sustainable development, with long-term focus shifting thinking from quantity to quality. As part of this shift, residents have become an important stakeholder in decision-making processes. Flanders also represents a comparable case to Wales. Like Wales, Flanders' DMOs are working at a sub-state level, with devolved competencies in various areas. This can affect the way in which a destination is marketed and the structures through which their DMOs function. Both are also managing geographically diverse areas, which experience distinctly different levels of tourism.

This case study was carried out largely through desk research, which was then supplemented with anecdotal insights from brief discussions with DMO staff in Flanders.

VISITFLANDERS strategic aims

VisitFlanders is the DMO in charge of the development, promotion, and coordination of tourism across Flanders. Popular tourist areas, such as Antwerp and Bruges, have their own more localised tourism boards (e.g. Visit Antwerp or Visit Bruges) that facilitate destination-specific work. However, this section focuses specifically on the work of VisitFlanders in order to understand how residents are incorporated into tourism at a higher strategic level.

VisitFlanders outline their ambitions in *Travel to Tomorrow: recommendations for tourism policy 2019-2024*. This memorandum documents their recommendations for the long-term development of Flanders as a destination, as well as their recommendations for tourism worldwide in a post-pandemic work.

“We have been traveling to tomorrow for a couple of years now, looking for a new kind of tourism, that can offer added value to all stakeholders involved: not just the visitors, but also residents, local entrepreneurs and the government at a certain place.”⁶

Work on *Travel to Tomorrow* began in late 2017 with the launch of a large-scale listening exercise and a day dedicated to stakeholder engagement. The goal of the listening exercise was to develop a more comprehensive understanding of what visitors wanted from a destination. This exercise gathered over 1,600 opinions which concluded that 3 core elements affect visitor travel experience: the intensity of the experience, the availability of authentic activities, and welcoming encounters with locals. Then in 2018 five think tanks explored the concept of a ‘flourishing destination’. This was followed by interviews and workshops with industry experts. The findings from all of this culminated in the *Travel to Tomorrow* magazine and book, which clearly set out VisitFlanders policy recommendations. They identify that the central strategic aim of tourism in Flanders should be on allowing Flanders to

⁶ [Travel To Tomorrow: The Book \(Travel to Tomorrow\)](#)

flourish as a destination for residents, entrepreneurs, and tourists alike. The Linden tree is used as a metaphor for this, as figure 1 below shows.

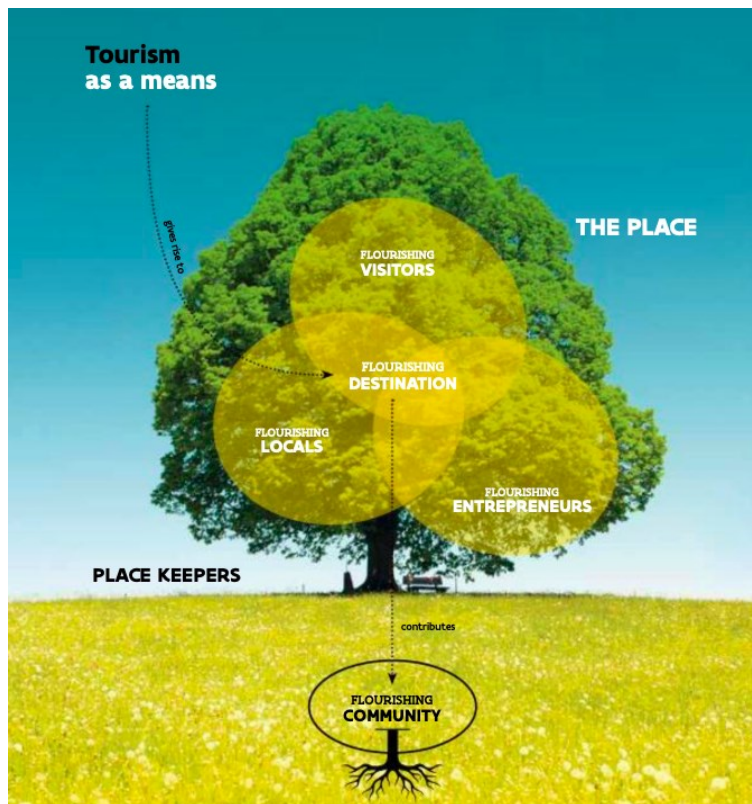


Figure 1 The Linden Tree explains how VisitFlanders envision a flourishing destination

To realise this aim 4 key priorities are identified:⁷

1. Focus must not be solely on the visitor if a destination is to thrive sustainably.
 - a. Monitor how and why locations thrive, and adjust policy accordingly in order to meet the aim of a thriving community, not just a happy tourist.
 - b. Map impactful stories which can be communicated by locals and developed into Flanders-wide narratives.
2. To create meaningful experiences, impactful visitor experience will be realised through connecting interest groups in Flanders with similar groups worldwide.
 - a. Begin with the passions of Flemish locals to develop narratives which appeal to interest groups overseas.

⁷ [Travel to Tomorrow: Recommendations for Tourism Policy 2019-2024 \(Toerisme Vlaanderen\)](#)

- b. Focus on impactful campaigns to encourage interest-driven rather than mass tourism.
3. Holidays need to be accessible for everyone in Flanders.
 - a. Invest in the Everyone Deserves a Vacation Network (*Iedereen Verdient Vakantie*).
 - b. Share what we learn from this worldwide.
4. A high-quality, Flemish-wide approach is needed to increase impact.
 - a. Support already-established tourism businesses to ensure sustainable practices are realised.
 - b. Work with policy to increase the impact of actions.
 - c. Ensure improvements are made in a way which considers residents, businesses, and visitors.

VisitFlanders argue that to realise these priorities a shift in thinking is needed; instead of seeing tourism as the end goal, today tourism should to be considered as a resource for sustainable development. In interviews with VisitFlanders' marketing director - Elke Dens – this is identified as a paradigm shift for the industry.⁸ Dens explains that at first this may be difficult for DMOs as capitalism and consumerism has often undermined efforts towards sustainable or regenerative tourism models. However, VisitFlanders are confident that a flourishing and sustainable destination can only be realised through a shift which ensures the needs of residents, businesses and local stakeholders are all considered. This approach echoes recent academic trends in tourism studies. As Nuets et. al (2021) summarise;

“while the potential macro-economic benefits of tourism development have been well-established, the negative social effects of uninhibited growth have received increased attention in the last decade, emphasizing the central role of communities in the search for a sustainable balance in tourism.”⁹

⁸ [For Visit Flanders, Long term destination development is the definition of success \(Destination Think\) & A Paradigm Shift from Quantity to Quality Tourism: Interview with Visit Flanders' Marketing Director Elke Dens \(Travel to Tomorrow\)](#)

⁹ [Resident Support for Tourism Development: Application of a Simplified Resident Empowerment through Tourism Scale on Developing Destinations in Flanders \(MDPI\)](#)

There are comparisons to be drawn here with Wales. The Welcome to Wales (2020-2025) strategy also focuses on sustainability and growing tourism for the ‘good of Wales’ – meaning residents, visitors and businesses should all be considered. Further, if Wales is to meet its strategic aim of a ‘warm welcome’ to all visitors, they will certainly need to avoid negative tourist sentiment amongst residents. Flanders plans to monitor residents views, listen to their stories, and integrate them into their tourism plans, could provide inspiration in how to engage local Welsh communities in Welsh tourism. The 2015 Wellbeing of Future Generations Act also requires the balance between the economic growth of the tourist industry and the wider wellbeing of the country. Again, there is potential to learn here from the Flanders approach of listening and connecting with residents.

Resident Surveys

VisitFlanders are clear that in order to realise their strategic aims, listening to residents needs to be a central tenet in their practice. To this end extensive local-level resident surveys began in 2016 in the popular art cities (Antwerp, Bruges, Gent, Mechelen & Leuven), which have now been extended further into other municipalities as well.¹⁰ Peter De Wilde, CEO of VisitFlanders, highlights that the repetition of these surveys is important, with the art cities all surveying their residents bi-annually. Although findings from the art cities discovered most residents supported tourism, the repetition of the surveys found that over a two year period there was a 19% increase in those who believed their quality of life had deteriorated because of tourism.¹¹ There were also increases in the number of respondents who said that they had been inconvenienced because of tourism, particularly in regards to overcrowding.¹² In the more recent 2021 surveys Flanders have included questions about the pandemic, and have seen a strong rise in complaints about overcrowding, despite visitor numbers dropping dramatically between the survey of 2019 and survey of 2021.

¹⁰ [Peter De Wilde of VISITFLANDERS on the Future of Tourism, Purposeful Marketing and Sustainable Destinations \(Sustainability Leaders United\)](#)

¹¹ [Tourists still welcome in Flemish cities, up to a point \(The Bulletin\)](#)

¹² [Flemish Residents Art Cities Still Welcome Tourists \(NECSTouR\)](#)

These surveys have been conducted through a variety of different methods, two of which are exemplified below.

The first is through the use of TCI Research's TRAVELSAT Resident Sentiment Index. This index gives insight into how local communities feel about the tourism on their doorstep. The standardised survey was able to track where and when resident sentiment was changing, whether residents felt the advantages of tourism outweighed the disadvantages, and some of the key disruptive aspects of local tourism (i.e. high cost of living, littering and overcrowding). Due to being a popular product globally, with a largely standardised resident questionnaire, it is also possible for Flanders to benchmark their results against their competitors. Given that areas such as Barcelona and Venice have recently experienced tangible resident anger towards tourism, benchmarking can be a particularly useful tool when trying to ascertain if issues are place-specific or being felt more widely.

The second, more experimental method is the RETS survey project, facilitated by Visit Bruges and MODUL University, Vienna.¹³ It used the RETS survey model to focus on three key aspects of Resident Sentiment:

1. Psychological empowerment (whether tourism increases one's sense of pride in their local area)
2. Social empowerment (whether the social benefits of tourism are felt locally)
3. Political empowerment (whether residents feel their opinions are listened to in tourism planning)

According to Vincent Nijs, who conducted the survey in Bruges, RETS "is a framework that helps us to define and survey different aspects of these [resident] attitudes and to find the relationships between these aspects". Therefore the RETS methodology doesn't just ascertain whether there is resident support, but also helps to shed light on the drivers behind this support.

¹³ [Resident Attitudes Towards Tourism in Bruges \(Toerisme Vlaanderen\)](#)

The findings indicate that support for tourism in Bruges is high, with 3 out of 4 residents believing tourism is important to their area, and 7 out of 10 believing the benefits outweigh the negatives. The survey further found that whilst there is strong support for tourism now, residents are concerned that growth will tip the pendulum, meaning the negatives may soon start to outweigh the positives. Nijs was also able to adapt the methodology to focus in on more localised pulse issues - in this case looking at resident sentiment towards AirBnB properties in Bruges. This had been a local issue gaining increasingly negative press coverage at the time. Interestingly the RETS approach revealed a divergence between press and public sentiment, with results finding that only 14% of residents blamed Airbnb for rising living costs, and only 5% of residents believing the company's presence in Bruges was causing a nuisance. In terms of drivers for support, there was a strong correlation found between considering oneself a proud citizen of Bruges and supporting tourism, with 8 out of 10 respondents reporting being proud of their home and happy with visitors. Two thirds also reported wanting to engage more with tourists; seventy percent of residents reported wanting to get involved in tourism projects in their local area, with inner city and younger residents showing particular enthusiasm.

Nijs is not the only one to adopt the RETS approach in Flanders. An academic study by Neuts et. al (2021) also utilised RETS but, in contrast to Nijs, focused on the 'undertourism' of the Scheldeland region in Flanders.¹⁴ Like Nijs they found a general support for tourism amongst the residents, and in deconstructing the drivers for this support found that residents can "be motivated and supportive of tourism, not through economic incentives, but through cultural pride and social networks". Hence they found a strong correlation between social/psychological empowerment and general support for tourism, with personal economic empowerment not playing a significant factor. The study also found that support was highest in areas with more tourism development, suggesting that increases in tourism may lead to "increasing support due to a higher awareness of accrued benefits through tourism". This suggests that negative sentiment can arise from both the underdevelopment and overdevelopment of tourism structures. Importantly Nuets et. al highlight how their

¹⁴ [Resident Support for Tourism Development: Application of a Simplified Resident Empowerment through Tourism Scale on Developing Destinations in Flanders \(MDPI\)](#)

findings support tourism strategies which seek to involve locals in both the development and application stages.

The two survey approaches adopted here demonstrate that there are different angles through which you can capture resident sentiment. On the one hand TCI's approach allows for the benchmarking of data through a more standardised model, but there are limits on the comparators. Benchmarking here is dependent on the access TCI have to data. This could be important when addressing Wales' approach to listening.

Interviews with stakeholders at a strategic level (see section 3) revealed that it would be most useful to benchmark against GB domestic neighbours. Ascertaining whether TCI have that data available needs to be considered if adopting this approach. On the other hand the RETS model by Nijs was designed from scratch, meaning it is more receptive to customisation. It is also designed to reveal the drivers behind resident sentiment – an important variable for all policymakers, DMOs, and local governments to understand. Further, the RETS approach is able to focus more on empowerment and resident engagement. In doing so it finds that economic benefits do not sway resident opinion as much as a sense of empowerment does (whether that be social, political or psychological). These findings are of particular relevance to Flanders in that they support their argument that integrating residents into tourism processes will lead to a more sustainable, higher-quality tourism model.

Resident Engagement Examples

Below are three brief examples of tourism projects which have incorporated locals. The three demonstrate how Flanders have sought to engage and empower residents in tourism practice.

Ask Antwerp

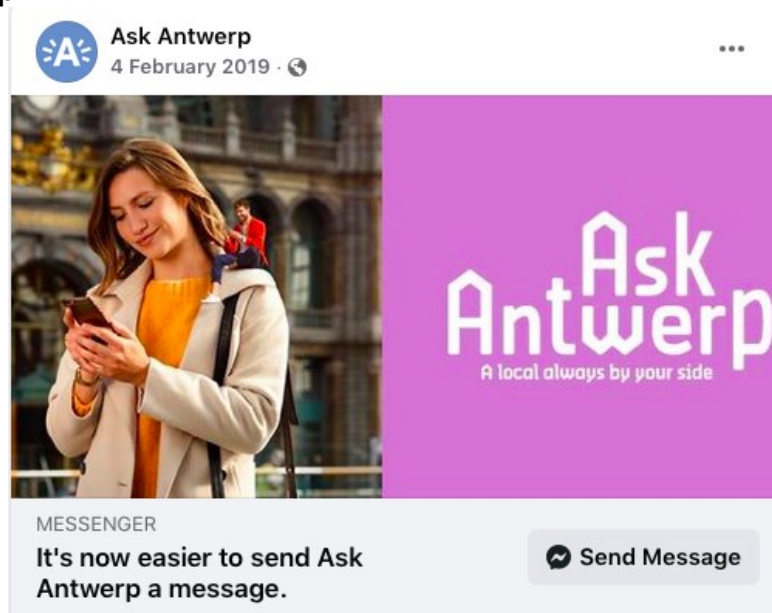


Figure 2 A post taken from the Ask Antwerp Facebook page

“Tourists can use our Ask Antwerp app to talk to locals and ask them where they can sample the best chocolate or beer in Antwerp, for example. It’s a great way of guiding tourists to places in the city which they might never discover otherwise.”¹⁵

Launched in early 2019 by Visit Antwerp, the Ask Antwerp platform connects visitors to the city with residents in order to provide a more authentic destination experience. Despite being marketed as an app, the project launched in 2019 as a Facebook chat function. Visit Antwerp explained that this decision was made due to wanting to remove the unnecessary barrier of visitors having to download something new just

¹⁵ [Balanced, sustainable tourism and gross national happiness in Bhutan and Flanders \(Travel to Tomorrow\)](#)

for their trip.¹⁶ The chat function was manned by local residents at all times, ensuring that visitors would always be speaking to a real person and not a chatbot. They had 40+ resident volunteers sign-up to work on the chat platform, with 20 very active volunteers. In order to recruit residents Visit Antwerp ran a regular incentive competition.

The platform was marketed primarily through tourist information centres, but was also advertised in museums, hotels, restaurants, and at key tourist attractions. According to the DMO's digital team the scheme was very well received by visitors, with multiple enquires per day being submitted. The digital team did however observe that these numbers fluctuated depending on which members of staff were on shift at the information centres, indicating that this is where most of traffic was coming from. Volunteers reported that most enquires were about food and drink; i.e. where can I find Belgium chocolate, or where can I find a good lunch?

There were plans to expand the platform, but in early 2020 the scheme had to be paused due to changes in Facebook's privacy rules. Visit Antwerp reported that they have plans to re-launch the project, but are still searching for a suitable platform. In the meantime their website is advertising that visitors can use the Spotted by Locals app; a privately run app which uses resident volunteer 'spotters' to recommend their favourite 'spots' in the city to visitors.¹⁷ The app is available in 60+ cities worldwide.

WW1 Centenary Events

Between 2014-2018 many remembrance events were scheduled to be hosted in Flanders to mark the centenary of WW1. As such the local tourism offices, particularly in West Flanders, forecast that visitor number would increase dramatically over the two-year period. The offices created a marketing campaign around these remembrance events, and began plans to ensure they could deal with the capacity issues the increased visitor numbers would bring.

¹⁶ All information taken from discussions with Visit Antwerp's digital team in Jul. 2022.

¹⁷ [Spotted by Locals Antwerp - Visit Antwerp \(visitantwerpen.be\)](https://www.visitantwerpen.be/en/spotted-by-locals-antwerp)

Soon after campaign launch, media outlets began criticizing DMOs for profiteering off a tragic event. Local residents also expressed their concerns around the insensitivity of said campaigns. In response, a series of focus groups were held with local residents in the regions affected to ascertain how they believed the centenary should be marked, and how it could be respectfully shared with the international visitors expected. These focus groups led to a series of citizen-led initiatives which local tourism offices facilitated.

The Westhoek region hosted one of these initiatives, titled the Remembrance Partners.¹⁸ They launched a resident-designed and resident-run WW1 training programme for those working in the local tourism industry, to ensure that visitors to the region were receiving a respectful, well-informed experience. The programme trained staff from tourist offices and museums, as well as historical guides and owners of hospitality businesses. The training aimed to teach staff about the key events which happened in Westhoek during WW1. 200+ staff took part in the initiative. Another initiative saw hundreds of local residents form a commemorative torch procession at dusk along a former battle line. Another initiative saw visitors being offered Poppy seeds to plant on return to their home countries. Visitors were encouraged to share images of their bloomed poppies on a commemorative Facebook page.

This centenary happened before the current strategic aims of Welcome to Tomorrow had been set out, but served as an influential example of how good tourism management should ensure resident engagement is accommodated from the outset. Here local tourist offices were forced into a reactive model. Earlier resident engagement would have identified these issues sooner, and could have avoided the negative press.

Everyone Deserves a Vacation Network (*Iedereen Verdient Vakantie*)

An important cornerstone of VisitFlanders' tourism strategy is to ensure that the work they do is open and accessible to all. As such the Everyone Deserves a Vacation Network aims to offer holidays or day trips to Flanders residents in low income

¹⁸ [Remembrance Partners Flanders Fields \(Flanders Fields\)](#)

brackets. The network is run by Tourism Flanders, but is made up of a group of organisations (both public and private) who work together to bring sustainable discounts to those who meet the threshold. Launched in 2001 with holidays for 752 people, by 2021 the network were able to help 144,305 residents experience both day trips and holidays in Flanders. They describe their mission as such:

“We believe in the positive effects of holidays and want everyone to be able to experience them. Leisure and tourism are important for body and mind. Someone who feels good about himself functions better. Someone who feels valued looks positively at society.”¹⁹

Tourism Flanders explains that the programme is an important way to support devolved policies, such as the Tourism for All Decree, the Action Plan for Equal Opportunities, the Flemish Youth Policy Plan, the Flemish Action Plan to Combat Poverty, and the Flemish Coalition Agreement. Whilst this is a very different approach to resident participation in tourism, it is a good example of how a programme focused on accessibility for different demographics can also impact resident empowerment. The RETS model advocates that a more informed resident is usually prouder, more welcoming, and happier to accommodate visitors to the area. Empirical research is needed to verify whether improving accessibility to local attractions would also create a happier, more engaged, and receptive local population.

Summary

1. Listening needs to be one of the first stepping stones in the process. Without first ascertaining the general sentiment of a population towards tourism, and how/if they want to be engaged, all strategy will inevitably become reactive (such as the centenary celebrations became in Flanders), rather than proactive. Further, the survey methodology affects what is learnt. Standardised surveys with more generic questions (i.e. the TCI TRAVELSAT

¹⁹ [Mission and Vision \(Everyone Deserves a Holiday\)](#)

one used by Flanders), allows an area to gauge the general sentiment of their population and benchmark themselves on key factors. Alternatively, home-grown surveys are able to be adapted to meet the local needs of an area (such as the RETS survey which is able to focus on pulse issues and reveal some of the drivers behind resident support).

2. More tourism is not necessarily better tourism; Here Flanders shifts the paradigm away from quantity and toward quality, and as such argue that the social and cultural benefits this brings to their residents is just as important as the economic factors.
3. A sustainable destination and tourism policy recognises the need to look beyond simply environmental factors. Flanders suggest that resident opinion needs to be central to making sustainable choices; without the support of residents no tourism scheme/project/strategy will endure. If we want to be sustainable we must work with communities, not against, nor even just alongside them.
4. The ability of Wales to deliver a 'warm welcome' is dependent on their residents attitudes towards tourism. Resident listening and engagement needs to be positioned as a central tenet in strategy. Ideas around co-creation and resident empowerment need to be explored in the early stages of strategy thinking and implementation. Given 2 of the 5 ways of working under the Well-being of Future Generations Act in Wales are **involvement** and **collaboration**, Wales is in a strong position to realise this type of tourism model. There are many ways to approach this more engaged model, as the case of Flanders here has demonstrated. Generic meetings in village halls represent an old way of working; today engagement can happen in many different ways and on many different levels. Projects can be hyper-local, such as the centenary celebrations, or nation-wide such as the Everyone Deserves a Vacation network.
5. There are benefits to be had in widening accessibility strategies to accommodate both the tourist and the resident. As Flanders here demonstrates, strategies could look more widely and address how they make facilitates more accessible for locals as well. An attraction which is also

accessible to locals can lead to increased feelings of localised pride and citizen support.

Section 3: Stakeholder interviews

Semi-structured interviews were held between Apr. 2022 – Jul. 2022 with a range of stakeholders, including a Local Authority that receives high volumes of tourism, and senior Welsh Government staff. The interviews aimed to gather the information needed to develop a use-case for both the visitor and resident survey. This document details the feedback related to the resident survey. In working backwards, and ascertaining what data stakeholders would want and use, a more robust stakeholder-informed survey can be designed to support evidence-based decision making.

A thematic analysis of the recorded responses was undertaken, and the following key themes were extracted:

- Granularity of data
- Customisation
- Benchmarking
- Communication of Data
- Nature of Data
- Resident engagement

Granularity of data

Stakeholders frequently discussed the level of detail (granularity) needed from the data, inevitably there was some disparity between stakeholders depending on the nature of their work; Welsh Government staff tended to emphasise the importance of ascertaining general sentiment across Wales - i.e. a pan-Wales understanding of residents attitudes towards tourists to guide targets and steer future strategies. This approach would however require a sample that is geographically representative of Wales as a whole. There was suggestion that charting carrying capacity (for example how many visitors an area could accommodate in terms of occupancy levels and crowd sizes) and 'pulse' issues in key tourist destinations across Wales would also be useful (e.g. overcrowding and cleanliness).

The Local Authority was interested in collecting more granular data. It was emphasised that they needed at least local authority-level data, and if possible destination-level data. It was also mentioned that some local authorities have designated areas of regeneration. It was suggested that more granular data could be used to provide evidence on these regeneration programmes. One local authority explained that if they are able to get data at this more granular level it would help with their KPIs.

All stakeholders discussed the pros and cons of a hyper-localised survey vs. a Wales-wide approach. The general consensus was that a survey which could be tailored through customisable options would work best (e.g. conditional redirection pages). This would result in a survey which has some localised data whilst also having the potential to scale-up nationally for Welsh Government.

The panel approach to sampling²⁰ was questioned/suggested by a few stakeholders. Welsh Government staff in particular felt that it may be needed if we can't gather a representative sample through other means. Both consumer and longitudinal panels were suggested (and criticised) suggesting a general disagreement around their usefulness.

It was discussed that whilst Welsh Government could put intercept surveys on their webpages, if local authorities wanted more granular data they would need to take ownership of marketing strategies in their respective areas.

There was a general consensus that the previous visitor survey was only able to provide a snapshot of issues at a specific moment in time, so much of the data wasn't actionable. It was emphasised by all respondents that any resident survey would need to be able to facilitate more granular and/or longitudinal data if it is to produce actionable data.

Customisation

After the interviewer demonstrated a digital always-on approach, all stakeholders were keen on being able to customise certain aspects of the survey.

²⁰ A consumer panel refers to a representative sample of people selected by an organisation to provide them with the opinions they require for consumer or business research. Alternatively a longitudinal panel repeatedly probes a stable group of participants over time to track changes in the metrics under study.

Suggestions made included the option to add extra questions that could be temporarily inserted regarding national days, festivals, and large events (e.g. stadium or sporting events). Further ideas were that data could be gathered on congestion issues, noise pollution, access issues etc. before, during, and after these events. Both Welsh Government staff and local authorities stressed that they would value data on how residents manage in different hotspot areas at peak times.

The local authority explained that it would be very useful to gather event-level data - particularly on how said events engage with local residents. Suggestion for heat mapping the routes of event attendees pre., during, and post event to understand both, where the heavy routes of traffic are, and how the event affects local businesses.

Welsh Government stakeholders explained that at a strategic level being able to add questions about large upcoming sports events would be particularly useful – including events not located Wales but that Wales are competing in. Example given: currently they don't have the infrastructure to go out and ask residents what they would like for the World Cup (e.g. screens and fan areas). This survey could potentially facilitate this.

Benchmarking

All stakeholders highlighted the importance of gathering data which could be benchmarked.

It was discussed how there is a large range of resident data available on European tourist destinations, however it was stressed by both Welsh Government and local authorities that it would be much more useful to be able benchmark against their domestic neighbours/competitors – particularly Scotland and Cornwall. Highlighted by Welsh Government was the ability to gather both positive and negative factors to benchmark. Welsh Government stakeholders also highlighted that benchmarking is particularly useful for reacting to negative media stories.

Communication of data

All stakeholders were very receptive to the idea of a dashboard – an online platform which could hold all data and be accessed by stakeholders as and when they need something. This approach was particularly appealing to local authorities.

Most stakeholders stressed how useful it would be to have more up-to-date, relevant data. It was felt that there is often too much of lag between data collection and reporting, with data often feeling too old to work with. In an ideal world both local authorities and Welsh Government seemed to want real-time updates available through a dashboard system. This way they could understand ‘what was happening on the ground in real time’.

It was highlighted by Welsh Government stakeholders that briefing summaries and monthly/annual reports may still be needed alongside the dashboard, as summaries and reports will still be needed for future planning and monthly management meetings.

It was discussed how the back-end of this platform needs to be well thought-out. E.g. considering if certain data is appropriate for all stakeholders to access at all times and that training may be necessary as not all stakeholders may have the skills to ‘find’ the data for themselves on it.

Local authority stakeholders stressed that the way data is presented makes a big difference in how much they use it and specifically requested clear infographics explaining that they had used data from [their own] previous resident survey in meetings when they’d had access to infographics.

Nature of data

All stakeholders were very keen to start gathering data on resident sentiment towards tourism in Wales. Multiple comments on how there is currently a data deficit in this area.

All stakeholders interviewed were receptive to moving to a largely digital approach. All highlighted that if this resulted in having more up-to-date actionable, the approach would be really valued. There was interest across the board on the idea of mixed-

media responses (e.g. survey respondents using video/photo/audio to provide feedback), but some hesitancy on how this would work in practice with staff analytical capacity.

Stakeholders could particularly see the value in multi-media responses with marketing and branding strategies. It was felt that mixed-media data would be useful at both local and government level. There was also some interest around how mixed-media responses may work with dual-language aspect of survey.

Welsh Government staff emphasised that they need to hear more from residents on “pulse issues” – second home ownership was used as an example, alongside overcrowding and littering. Local authority stakeholders highlighted that it would be useful to have questions geared towards sustainability, given the aims of the tourism strategy.

A couple of stakeholders highlighted that scope creep will happen with this type of survey, and it is important to consider the digital infrastructure needed to accommodate this insofar as the survey methodology and platform would need to be flexible enough to accommodate these extra requests.

Resident engagement

Stakeholders were questioned on whether they would be interested in looking into how to engage residents in either tourism strategy or specific tourism projects.

There were varying reactions to this, which appeared to be dependent on experiences in different areas of Wales. Some felt that there was already enough infrastructure in place for local voice, others felt that this is an area currently neglected.

Local authorities were particularly receptive to the idea of engaging residents at an early stage in tourism plans and decisions. They liked the idea of ensuring residents were involved in projects and engaging with visitors.

It was explained by one stakeholder that at a strategic level ensuring resident engagement models are in place is important. Given this was written into the *Welcome to Wales* strategy it needs to be considered.

Suggestion from one stakeholder that we need to make residents aware of how important tourism is in Wales – there is the potential that it's currently 'undersold' to residents. Example given: employment numbers of those working in the industry are particularly high in Wales. Suggestion that if residents knew this they may become more invested in local-level tourism projects.

Summary

- a. Finding a happy medium between pan-Wales and local-level data will be important. One option is to address this through conditional redirection questions/pages, however collaboration would be central to identifying the data needed . Working out how to provide high-quality data at both of these levels will be a long-term process, however the pilot stage gives a good opportunity to start trialling this.
- b. The quality of the data at a local level will be heavily dependent upon involvement from local stakeholders and authorities. If they are able to contribute to sample size in their local areas, inevitably the granularity and quality of their data will improve.
- c. It will be important in the pilot stage of this project to not just explore different questions but also different methods of recruitment. This will give a more informed understanding of how we will ensure sample size is both representative at a local and national level.
- d. It is clear that a digital dashboard approach is a popular for data presentation. The value placed on actionable, recent or real-time data was high, and a dashboard infrastructure would enable this.
- e. Further, in order to ensure the data gathered is actionable, foundations need to be laid early on in the process to enable an ongoing conversation between all stakeholders on how the data is being used. This will allow the survey to be shaped over time into something valuable to all.
- f. Whilst the importance of resident engagement was acknowledged across the board, there seemed to be a lack of understanding of what this could look like in practice.

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