

Snapshot: Resident Satisfaction with Tourism



Snapshot: Resident Satisfaction with Tourism

A snapshot report produced for
the European Travel Commission, CityDNA, and NECSTouR
by MMGY TCI Research

Disclaimer

The findings, views, and opinions expressed in this report are solely those of MMGY-TCI Research and do not represent or reflect the views of the European Travel Commission, CityDNA, or NECSTouR.

For further information regarding the data sources and methodology used in this report, please contact MMGY TCI Research directly at: request@tci-research.com

Copyright © 2026 European Travel Commission (ETC), CityDNA, NECSTouR

Snapshot: Resident Satisfaction with Tourism

All rights reserved. The contents of this report may be quoted, provided the source is given accurately and clearly. Distribution or reproduction in full is permitted for own or internal use only.

Published by the European Travel Commission, CityDNA, and NECSTouR

ETC & NECSTouR

Rue du Marché aux Herbes, 61,

1000 Brussels, Belgium

-

CityDNA

Rue de Talant, 29D,

21000 Dijon, France

Website: www.etc-corporate.org, www.citydestinationsalliance.eu, www.necstour.eu

Email: info@visiteurope.com, headoffice@citydna.eu, info@necstour.eu

ISBN No: 978-92-95107-88-5

This report was compiled and edited by MMGY TCI Research for ETC, CityDNA, and NECSTouR



<https://www.mmgyglobal.com/>

Resident Satisfaction with Tourism

Contents

| | |
|--|----|
| Foreword | 6 |
| What Drives Residents' Support for Local Tourism ? | 9 |
| Tourism as a Catalyst for Social Integration and Cultural Exchange | 12 |
| Information, Consideration and Citizen Engagement..... | 14 |
| Tourism Supported Across all Living Environments, with Specific Attention Required in Mountain Areas | 16 |
| Addressing Tourism Pressures to Maintain Support | 18 |
| Conclusions..... | 21 |

Chapter 1

Tourism Enjoys Broad Support at Local Level



Foreword

The Backdrop – A focus on residents

Destination marketing and management organisations (DMOs) and National Tourism Organisations (NTOs) increasingly recognise that residents' sentiment toward tourism is a critical driver of both sustainability and destination attractiveness. Recent MMGY Portrait studies among European, Asian and North American travellers show that potential locals' hostility ranks among the top two concerns when selecting a destination, while the sense of welcome by locals remains the most important factor shaping visitor satisfaction and sentiment of safety at the destination.

Against a backdrop of growing social and political polarisation—and ongoing negative narratives about tourism pressure in certain local areas—this joint research paper brings a data-driven perspective. Based on a meta-analysis performed by MMGY Travel Intelligence Experts covering 100+ European countries, regions and cities of all sizes, geographies, and visitation pressure, the study fact-checks public opinion on tourism through methodologically grounded analysis of more than 50 standard sentiment indicators collected from 30 000 interviews of residents aged 18+ (methodological note provided below).



81%

Of residents feel proud to see tourists visit their place

Tourism Enjoys Broad and Positive Support at Local Level

The survey confirms that a vast majority of European residents welcome tourism development in their community and express strong acceptance of seeing visitors come to discover their area:

- **81%** of respondents agree to say they feel proud when tourists travel from afar to visit their place
- **74%** enjoy giving them advice and tips
- **78%** consider their destination should continue to be promoted to attract visitors

Moreover, the RSI® Net Sentiment Score measures the balance between tourism supporters and detractors on a scale from -100 to +100, reflecting whether residents perceive tourism as generating more positive consequences than negative ones, or the reverse. **In Europe, this reference score reaches 53**, indicating that residents who perceive tourism as having more positive than negative impacts outnumber critics by six to one. Across Europe, residents who can be described as “**Tourism-Averse**” represent only **6% of the population**.



74%

Enjoy giving advice and tips

Methodological note

The analysis is based on a sample of **30,000 interviews drawn from the reference MMGY Resident Sentiment Index (RSI©) survey**. The research was conducted by MMGY analysts, drawing on experience from more than 100 resident sentiment studies delivered for national, regional, and local destinations across Europe.

The RSI© survey takes approximately 10 minutes and covers a comprehensive set of topics, including overall sentiment, perceived benefits and challenges of tourism, and expectations for the future. It also includes demographic questions to enable data segmentation (e.g. local visitation levels, involvement in hosting activities, type of environment, length of residency). Representative sampling is ensured through quotas based on population statistics for gender, age, and geographic distribution.

The consolidated dataset covers residents living in **Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Slovenia, Spain, Sweden, Switzerland and the United Kingdom**.

To capture a broad diversity of perspectives, the analysis includes residents from large, medium, and small urban areas, as well as rural, seaside, island, and mountain destinations.

Locations vary in tourism exposure, ranging from rarely visited areas to destinations experiencing high visitor volumes. Each country is weighted equally in the consolidated results to ensure balanced representation of different tourism contexts, development stages, and destination maturity levels.

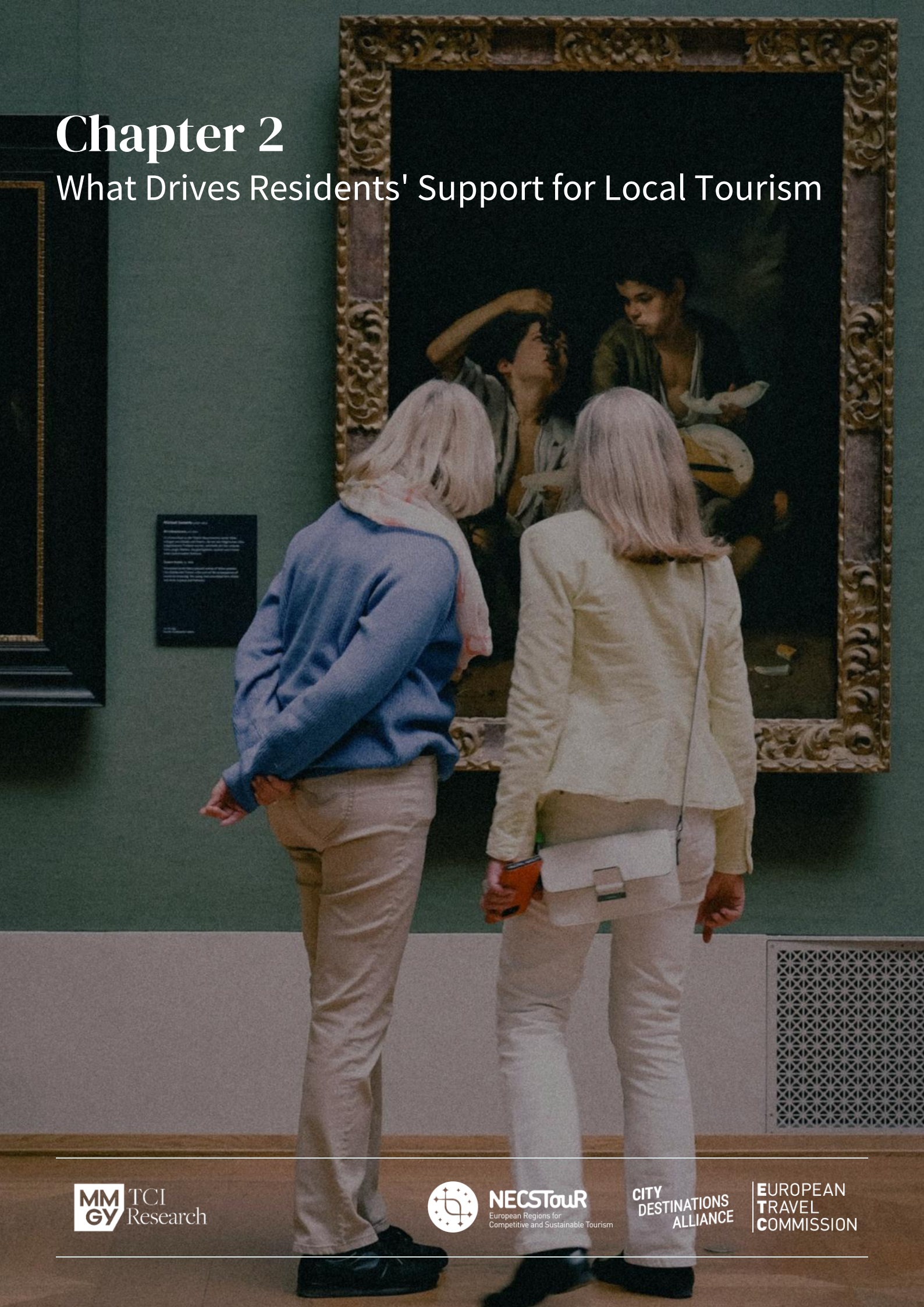
Notes on Interpretation

This report provides a high-level overview of residents' *satisfaction with* tourism, highlighting broad patterns and general sentiment. The findings are intended to offer directional insight and should not be interpreted as reflecting the specific situation of individual destinations, regions, or communities, where perceptions may differ significantly depending on local conditions.

The relationship between tourism and residents is complex and shaped by multiple contextual factors. As such, these results should be considered as a general reference point rather than a detailed **diagnosis**. When informing strategy, policy development, or resource allocation, it is recommended that these insights be complemented with more in-depth, locally grounded analysis to ensure decisions are appropriately tailored to specific contexts.

Chapter 2

What Drives Residents' Support for Local Tourism

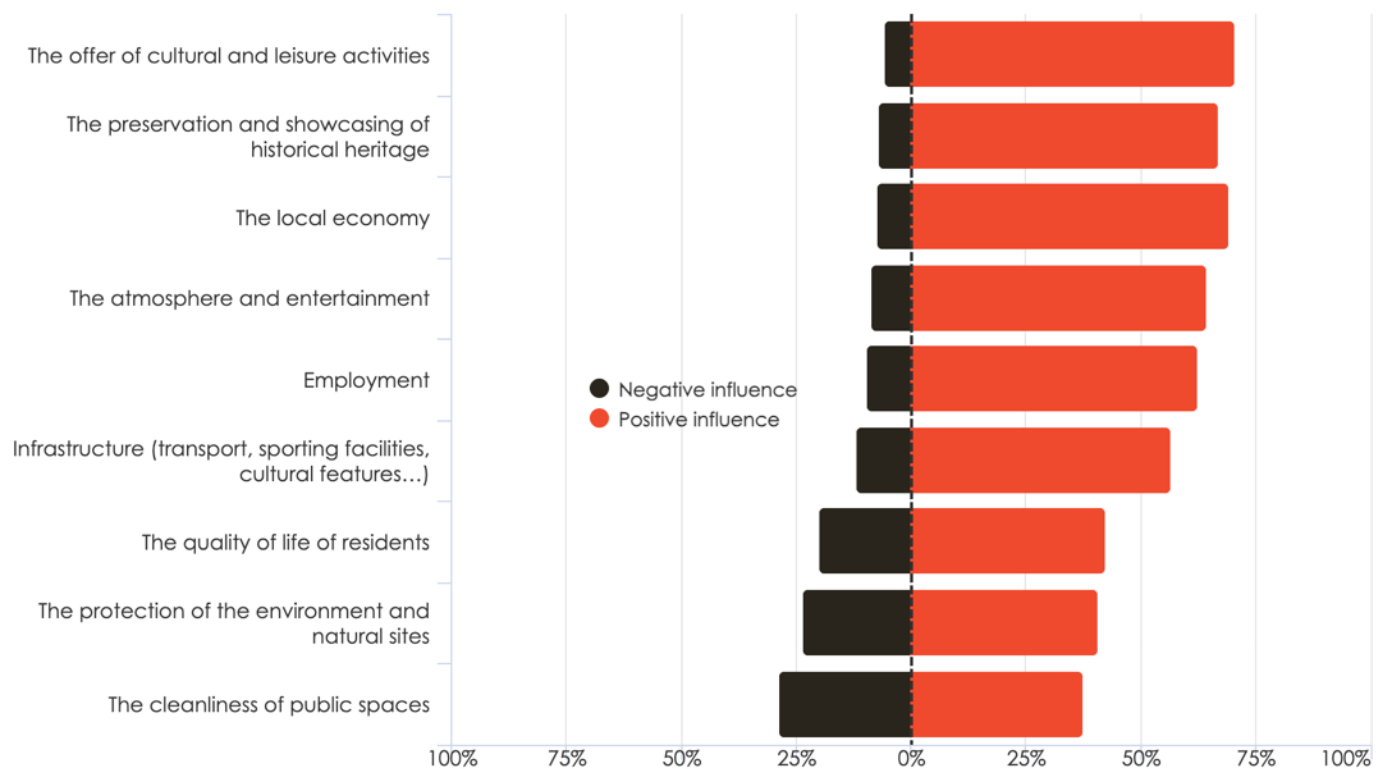


What Drives Residents' Support for Local Tourism?

Drawing on residents' everyday experiences, tourism is widely perceived as **a positive catalyst for their life and living environment**. Respondents associate tourism with increased economic opportunities, a more vibrant atmosphere, enhanced cultural and leisure offerings, and improved maintenance of heritage and natural environments. These benefits are seen as tangible, reinforcing the widely shared belief that **what benefits visitors usually benefits local communities too**.

When residents are asked to assess tourism's impact across multiple aspects of their place, sentiment consistently skews positive, with **all dimensions tested showing a net positive perception** - even for less consensual topics such as the cleanliness of public spaces.

Fig.1: Tourism Impact Perceptions on...



Beyond the well-known economic contribution of visitor spending, residents associate tourism with **concrete and visible benefits for the local community first**: 85% say it generates revenue for local businesses, while 79% agree it stimulates the development of new businesses, generating positive impacts on local employment.

In addition, 73% of residents recognise that tourism helps sustain amenities and attractions that would not be viable based on the local population alone.

Some aspects remain more sensitive in residents' perceptions. **The cleanliness of public spaces, the protection of the environment, and residents' quality of life** show comparatively higher levels of concern, with around a quarter of respondents expressing negative views. While these dimensions still register a net positive impact, this indicates that a non-negligible share of resident's experience downsides that should not be overlooked.

Chapter 3

Tourism as a Catalyst for Social Integration and Cultural Exchange

Tourism as a Catalyst for Social Integration and Cultural Exchange

One of the most compelling findings of the meta-analysis is the extent to which residents value tourism as a catalyst for social integration, well beyond its economic contribution. In a context marked by social tensions and polarised debates both internationally and locally, **tourism emerges as a powerful vector of openness and connection**, anchored in a strong sense of pride in place and a willingness to share it with international visitors.

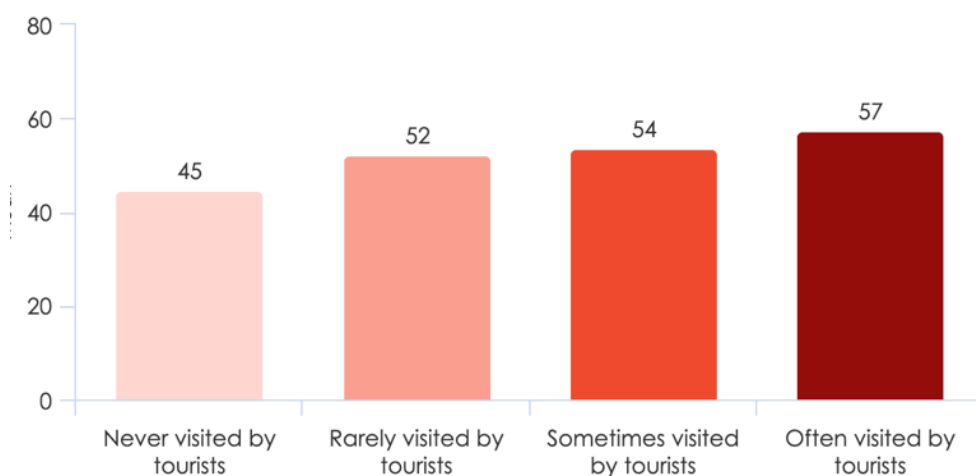
The data highlights broad support for inbound tourism and its social benefits. **A large majority of residents (81%) would like to welcome as many or more international visitors in the future**, stressing a significant potential for growth in many areas. While overcrowding can create tensions in certain locations or at specific times of the year, 82% of residents report positive attitudes toward major events and the crowds they attract—highlighting their role in bringing locals and international audiences together around shared passions.

In addition, **73% see tourism as a driver of diversity in their community**, and 72% believe tourism can inspire visitors to settle in their area over time.

This openness is further reflected in strong advocacy levels. With an average Net Promoter Score above 30 points—and exceeding 50 in highly touristic areas—**Europeans express high pride in their place and a clear inclination to recommend it to others**. The study also shows that one in five residents regularly host friends or family to visit or explore their destination, while more than 10% do so occasionally, revealing **a substantial pool of local ambassadors that DMOs can engage and activate**.

Another key insight reinforces the complexity of social acceptance of tourism: resident support tends to increase in line with visitation levels, as illustrated in the chart below. In other words, **tourist presence, is generally not perceived as a source of negative pressure across most destinations**. This positive relationship is not without limits though. Highly popular destinations should continue to manage tourism growth within socially and environmentally acceptable thresholds, as excessive pressure can trigger tourism aversion—ultimately undermining visitor experience, destination reputation, and residents' quality of life.

Fig.2: RSI® Net Sentiment Score x Levels of visitation in living area



Chapter 4

Information, Consideration and Citizen Engagement

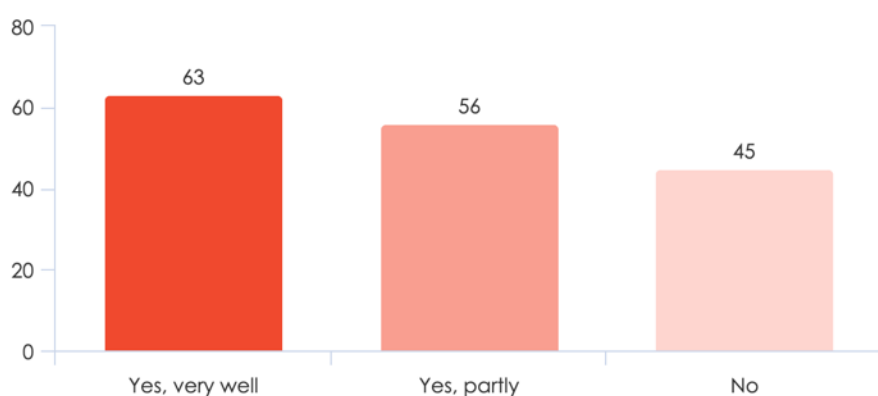


Information, Consideration and Citizen Engagement

A recent Personas Analysis segmenting residents by shared attitudes toward tourism shows that **fewer than 4% of Europeans fall into the “Passive Bystanders” category**, when it comes to tourism, underscoring the sector’s relevance and visibility within local communities. Tourism has become a significant topic in social conversations as it touches many adjacent areas beyond tourism (transportation and mobility, housing, cleanliness, cultural identity, security, cost of living, etc.). As tourism impacts are tangible in everyday life, residents also express a high level of engagement with tourism-related issues. **More than half (55%) say they would like to be more involved in local decision-making around tourism.**

Close to **seven in ten Europeans consider themselves informed and up to date** on news or data about tourism. Further reinforcing the importance of maintaining regular and meaningful engagement with local communities, the data shows a clear **relationship between residents’ level of awareness of the tourism sector and their support for its development**, as illustrated in the chart below. In other words, a greater understanding of tourism’s role and impacts is associated with stronger public support.

Fig.3: RSI® Net Sentiment Score x Tourism Sector Awareness



Beyond simple information-sharing **more than half of residents (56%) believe that local tourism policies adequately consider tourism’s impact on their daily lives**, highlighting the value of transparent, inclusive, and ongoing dialogue between destinations and their communities, especially given tourism’s exposure to wider social and political debates.

RSI® indicators highlight the importance of building strong, tangible connections between destination policymakers and local communities—starting at neighbourhood level, where residents live and work. Rather than relying solely on high-level messaging around “big numbers” such as jobs, tax revenues, or visitation figures, **public support is strengthened when tourism policies translate into concrete, visible benefits in everyday local environments**. Notably, the positive economic impact of tourism is widely recognised, even among 40% of residents who are otherwise critical of tourism.

Persona analysis further reveals that around **20% of Europeans can be classified as “Engaged Citizens”**—the group showing the strongest willingness to actively contribute to local tourism development. Though diverse in profile depending on the destination, this segment is typically most **prevalent among 18–35-year-olds living in highly visited areas**, representing a particularly valuable audience for destinations seeking to co-create, consult, and engage communities around tourism strategies.

Chapter 5

Tourism Supported Across all Living Environments,
with Specific Attention Required in Mountain Areas

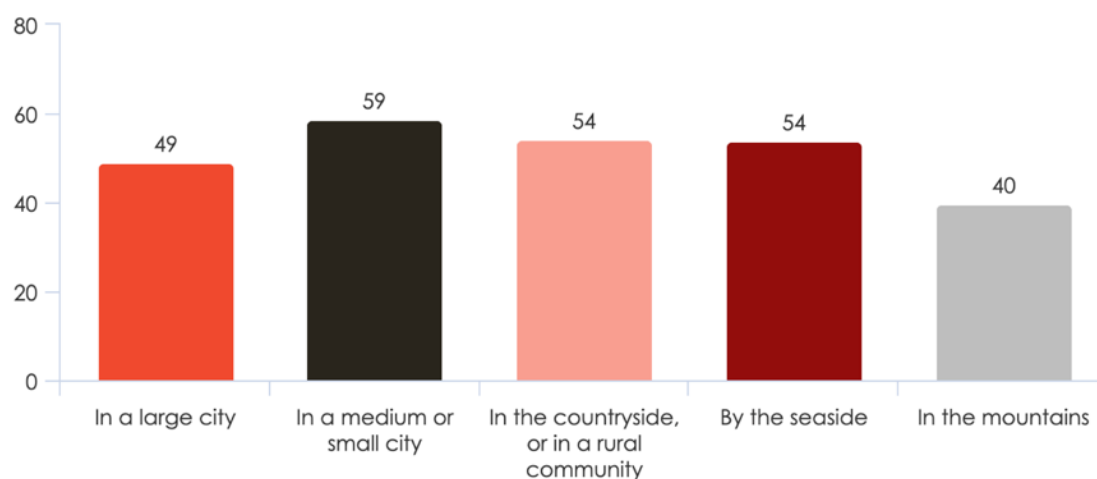


Tourism Supported Across all Living Environments, with Specific Attention Required in Mountain Areas

Overall, public support for tourism development does not appear to be determined by the type of environment in which residents live—whether large urban centres, smaller cities, or rural areas—and remains **broadly positive across all destination profiles**.

That said, the European-level results highlight some nuances in mountain destinations. While most urban areas continue to show particularly strong support for tourism, **residents in mountain regions are more sensitive to rapid growth and pronounced seasonal visitor flows**, which can, in some cases, temper local support.

Fig.4: RSI® Net Sentiment Score x Types of areas of living



In mountain areas already facing climate and weather-related pressures on daily life, the main challenges associated with tourism relate to mobility (parking and traffic), rising costs of living—particularly housing—and environmental protection. Despite these pressures, support remains high: **eight in ten residents living in mountain destinations say they are proud to welcome visitors from abroad** and agree that their destination should continue to promote itself to attract tourists.

Chapter 6

Addressing Tourism Pressures to Maintain Support



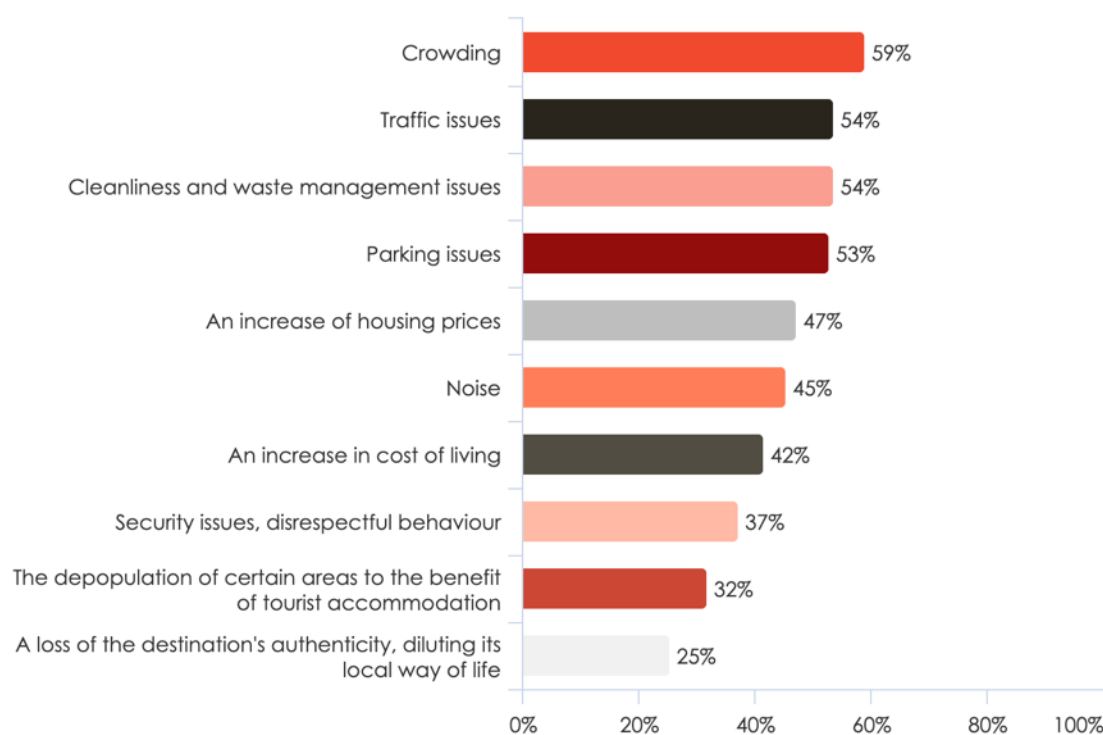
Addressing Tourism Pressures to Maintain Support

Continued vigilance is essential to ensure that tourism remains a force for positive development supported by local communities over time.

Identifying potential friction points involves assessing the seasonality of perceived nuisances and ranking the issues residents associate with tourism when they occur. On average, **16% of residents report nuisances occurring “most of the year,”** compared to 40% who experience them “at specific times in the year.”

Among residents reporting issues, the survey enables a prioritisation of the main types of nuisances perceived.

Fig.5: Perceived Tourism-Related Nuisances (Data filtered to respondents reporting nuisances)



The ranking of perceived challenges pointed out by tourism-averse residents in Europe **points primarily to issues linked to pressure on local infrastructure and public space:** crowding, traffic, cleanliness, waste management, and parking—each cited by more than half of residents reporting problems. Those underscore the importance of sustainable tourism development, particularly in terms of **mobility management, urban services, and environmental protection.**

Notably, economic pressures such as housing affordability and cost of living also feature prominently, reflecting wider structural tensions currently affecting many European communities beyond tourism alone. This suggests that residents often attribute problems arising from broader social and economic dynamics to tourism.

In fact, **35% of residents in Europe who can be described as “Tourism-Averse” live in areas that are rarely or never visited by tourists.**

Issues related to social behaviour, security, or loss of authenticity rank lower in the hierarchy, indicating that

concerns are **less about cultural erosion and more about the management of tourism flows and their integration into everyday life**. Overall, the findings highlight the need for sustainability strategies that focus on operational solutions—transport, housing, waste, and spatial planning—while remaining attentive to the wider social climate in which tourism operates.

The need for maintaining high support for tourism is particularly relevant for younger generations who, while largely welcoming tourism and happy to be involved in tourism-related decisions, tend to express lower levels of tourism support than residents aged 35 and over.

Chapter 7

Conclusions



Conclusions

This joint research confirms that tourism enjoys strong and widespread support among European residents, who largely view it as a positive driver of quality of life, social connection, and local pride. Beyond its economic contribution, tourism is recognised as a catalyst that fosters social integration, cultural exchange, and community engagement.

While expectations around sustainability, mobility, housing, and environmental protection remain high—particularly in pressure-sensitive areas such as mountain destinations or local places where tourism grew “too fast”—public support strengthens when tourism is well managed, locally grounded, and clearly understood.

Key facts:

- 81% of residents are proud to welcome visitors; RSI Net Sentiment Score reaches +53.
- Opposition remains marginal -only 6% of residents can be classified as “Tourism-averse”- but should be carefully watched by destination organisations.
- Economic benefits are widely acknowledged: 85% see revenue generation; 79% link tourism to job-creating business growth.
- Tourism is strongly associated with vibrancy, amenities, and heritage preservation, as well as strong social value: 73% see tourism as enhancing diversity, 8 in 10 residents want to welcome more or as many events in the future.
- Higher visitation generally correlates with stronger resident support (within acceptable limits).
- 55% of residents want greater involvement in tourism-related decisions.
- Friction points are operational and seasonal: key issues include crowding, traffic, waste, and housing—more often at specific times (40%) than year-round (16%).

Overall, the findings underline a clear mandate for destinations at local, regional and national levels: ensure that tourism remains compatible with residents’ quality of life - pursue tourism development that is balanced, inclusive, and tangible for residents, and actively engage communities as partners in shaping the future of tourism.
