

North American Edition

# TIME FOR DEMOCRACY

## Global Best Practices in Community Engagement

JANUARY 2023 REPORT



The North American edition of a Global Study on  
Community Engagement for Destinations Organizations



[northamerica.timefordmocracy.com](http://northamerica.timefordmocracy.com)

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- **Summary Report of Survey of North American and European DMOs** on Community Engagement, August 2022, [Download Survey Summary](#).
- **Time for DMOcracy Global Case Study Summaries**, [See Online Tool Kits](#).
- **Time for DMOcracy Secondary Research Summaries**, [See Online Tool Kits](#).

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## Acknowledgement and Thanks

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

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

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



### Program, Agency and Association Partners in Time for DMOcracy (North America)

 IN ASSOCIATION WITH 	ACADEMIC PARTNERS:  	OTHER AGENCY PARTNERS:    	ASSOCIATION PARTNERS:    
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## Introduction

It is Time for DMOcracy. For too long, the tourism industry has neglected to operate in partnership and collaboration with the local community, leading to imbalanced and unsustainable practices.



**<33%**

**OF RESIDENTS FEEL INCLUDED IN TOURISM'S DEVELOPMENT**

Just a small minority of North American residents (29% in the U.S. and 33% in Canada) agree with the statement: "Residents are consulted when major tourism development takes place in this area" (i).

**>75%**

**OF DMOS AGREE THAT LOCAL RESIDENTS FEEL EXCLUDED**

Only a small minority of DMOs (17% in North America and 26% in Europe) believe residents in their own community "feel they have significant influence on tourism's development and management" (ii).

**13%**

**OF DMOS IN NORTH AMERICA SURVEY LOCAL RESIDENTS REGULARLY**

Most DMOs do not undertake regular research on the sentiment of residents towards tourism. Only 13% of North American DMOs and 25% of European DMOs undertake surveys at least once per year – and over half of U.S. & Canadian DMOs have never surveyed their local residents (iii).

**>80%**

**OF DMOS HAVE NOT DEVELOPED KPIS TO MEASURE RESIDENT SENTIMENT OR ENGAGEMENT**

Only 17% of North American DMOs have Key Performance Indicators (KPIs) to measure resident sentiment and/or community engagement (iv).



The tourism industry depends on the positive perception and support of the local community, referred to as "social license," for its success and growth. This is expressed through a sincere and welcoming attitude from locals, which is not only a crucial aspect of the visitor experience, but also vital for securing political and financial support for tourism. The COVID-19 pandemic has underlined the urgent need for tourism to prioritize and actively work towards building strong relationships with communities.



Time for DMOcracy is the title of the largest-ever research and education program to examine and report on community engagement—an international study to define global best practices in building successful, resilient and enduring partnerships with local residents, community groups and businesses. This report is aimed at official city, state, provincial and national tourism organizations,

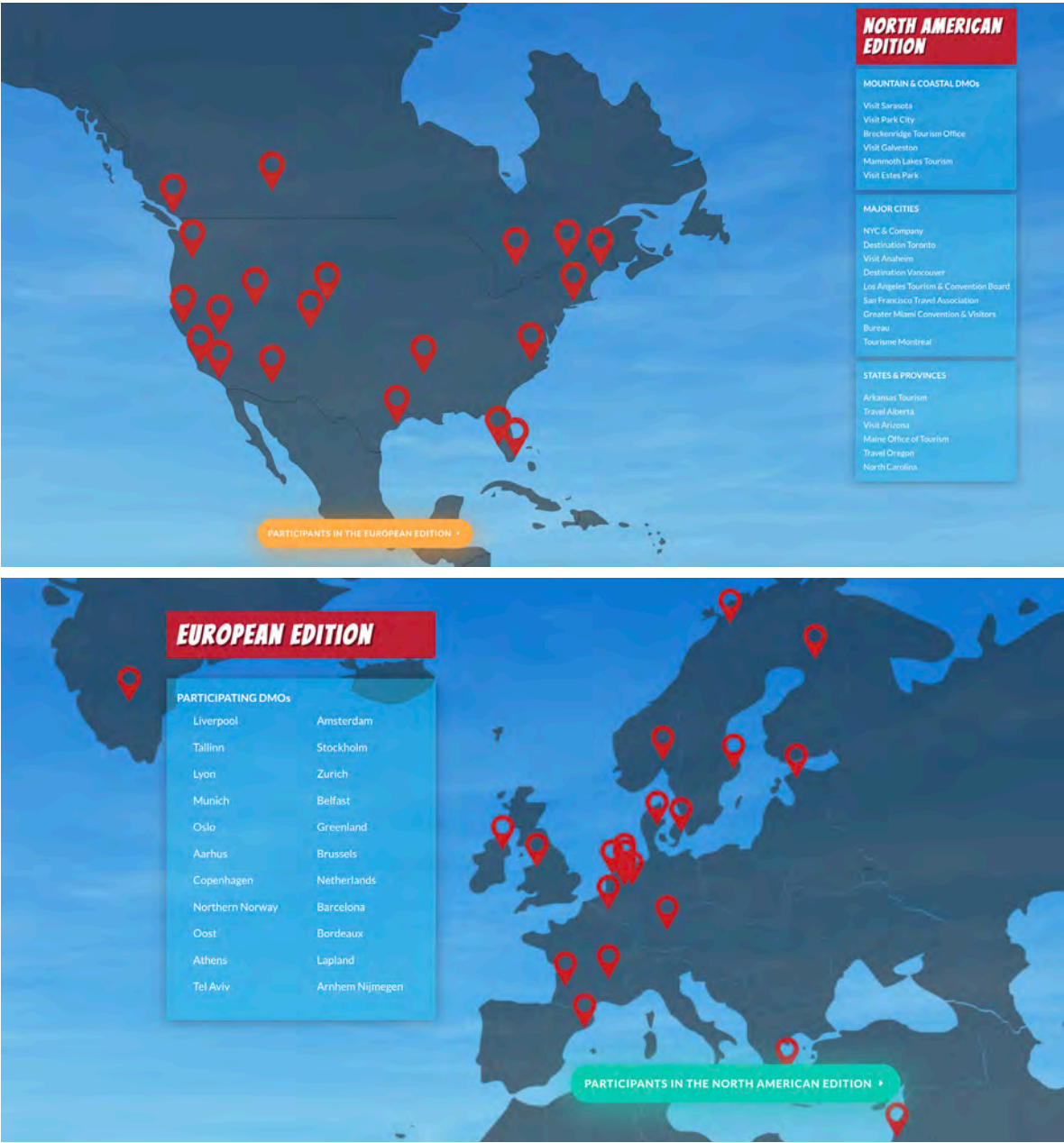
collectively called Destination Marketing and Management Organizations (DMOs). DMOs, which are often private-public entities funded and supported by both government and industry, are well-suited to take on a leadership role in community engagement through tourism. Time for DMOcracy offers critical insights, recommendations and resources of value to every DMO across North America, Europe and beyond.



Time for DMOcracy was initially conceived by Group Nao in Europe who then undertook the European study with agency and association partners. Through collaboration, Miles Partnership then customized and led a parallel North American edition of this study with agency and association partners. Both the North American and European editions of this study included a series of learning labs, in-person events and discussion groups with the destination partners. Dozens of case study summaries highlighting real world examples of DMOs engaging with local communities were prepared.



With our academic partners, the study also conducted a thorough global review of all existing research on community engagement and developed an extensive set of research summaries. Finally, Time for DMOcracy conducted a comprehensive survey of nearly 300 DMOs in North America and Europe to assess their perceptions, policies, and plans regarding community engagement. The study was conducted throughout 2022, and the final report was published in January 2023.



Time for DMOcracy was made possible by the support and input of 42 leading North American and European DMOs and a range of other academic and association partners who participated as both destination and knowledge partners. See the Acknowledgement pages recognizing the partners included in this introduction and in each report section.

# Executive Summary



The North American edition of this global study identified six priority areas or themes for in-depth research, analysis and recommendations on best practices in community engagement:

- I. Community Participation
- II. Resident Sentiment Research
- III. Tourism & Hospitality Workforce
- IV. Diversity, Equity & Inclusion
- V. Media and Communications
- VI. Short Term Rentals

**In each of these areas, the findings and recommendations are summarized in three parts:**

## “What To Know”

outlines the primary and secondary research and insights from our destination and knowledge partners.

## “What To Do”

highlights key actions that DMOs should prioritize in order to effectively engage with their community.

## “Resources To Use”

lists the critical research, reports and other resources that provide useful support for taking action. Of particular importance are the wide range of global case studies of community engagement prepared by the North American partners on destinations across North America and Europe and research summaries of the most important existing research on community engagement prepared by the University of South Carolina.



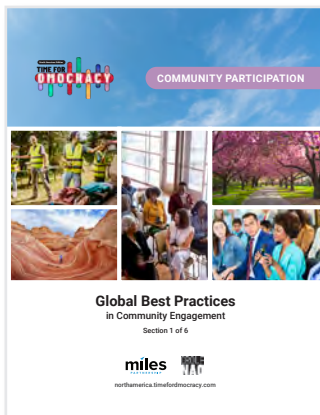
The European edition of the study focuses more on community participation models, methodologies and policies, including more detail on citizen assemblies, digital engagement, community storytelling, volunteering and citizen science, participatory placemaking and budgeting

Time for DMOcracy is designed to be a practical resource combining a summary of existing knowledge with real world examples of community engagement. It is focused on inspiring and informing action.

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Below is a summary of the key actions on community engagement identified for DMOs and their public and industry partners. These are grouped by the six themes of community engagement prioritized in the North American study:

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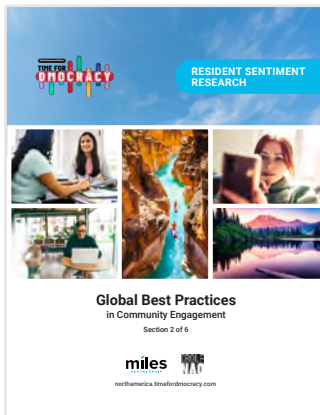
## COMMUNITY PARTICIPATION

Community participation models are at the heart of this global research and education project. For community engagement to be successful, local communities must be consulted and involved in how tourism is developed and managed. Time for DMOcracy identified these six areas of action for DMOs:

- 1.** Review and refine your informal engagement with local community leaders.
- 2.** Select a participation model that works for you and your community.
- 3.** Build in these six best practices in community participation models:
  - i. Get started early with community participation.
  - ii. Provide a clear, meaningful role for community participation.
  - iii. Support informed debate and recommendations.
  - iv. Amplify community, business and government voices.
  - v. Encourage inclusive, diverse representation.
  - vi. Integrate resident sentiment research and destination management.
- 4.** Expand your use of online community participation tools.
- 5.** Invest in volunteer opportunities for your community.
- 6.** Explore community participation in how tourism taxes are spent.

**See Section 1: Community Participation Models for the full report on What to Know & What to Do**



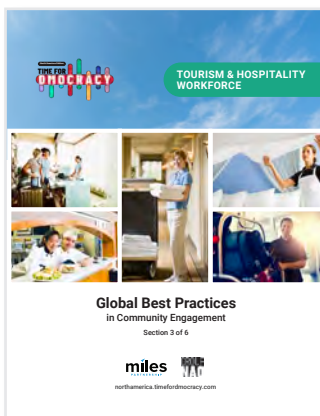


## RESIDENT SENTIMENT RESEARCH

The Time for DMOcracy study has highlighted that investment in resident sentiment research is foundational for successful community engagement. Time for DMOcracy identified eight areas of action for the DMO to plan and support high quality resident sentiment research that will inform their community engagement strategies:

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

**See Section 2: Resident Sentiment Research for the full report on What to Know & What to Do**

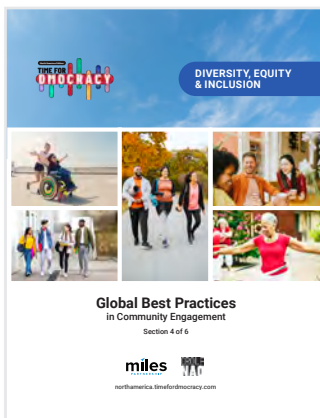


## TOURISM & HOSPITALITY WORKFORCE

Staffing issues are both an immediate and structural problem. Solving workforce challenges in tourism and hospitality will involve long-term action by the DMO and multiple private and public partners. Time for DMOcracy identified nine areas of action:

1. Monitor, research and understand workforce and staffing issues in your industry and community.
2. Engage with high schools and tertiary institutions to develop educational opportunities in the tourism and hospitality industry.
3. Promote and support recruitment efforts, including marketing job vacancies and supporting job fairs.
4. Be an advocate for the tourism and hospitality industry. Work with partners to promote career benefits and opportunities.
5. Invest in high-value tourism that is operational year-round and resilient.
6. Help build high-quality tourism careers.
7. Support competitive wages, working conditions and advancement opportunities.
8. Facilitate affordable and accessible housing and childcare for workers.
9. Strengthen the coordination between public and private organizations to make long-term investments in the workforce.

**See Section 3: Tourism & Hospitality Workforce for the full report on What to Know & What to Do**

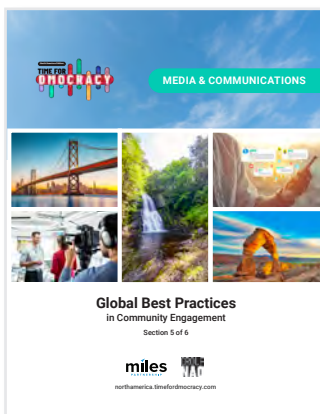


## DIVERSITY, EQUITY & INCLUSION

Rather than viewing diversity, equity, and inclusion as a standalone concept, it is important to integrate these principles into all aspects of community engagement. Time for DMOcracy identified nine action steps the DMO should take to actively support diversity, equity and inclusion in their community:

1. Make the commitment to take action on diversity, equity and inclusion throughout every part of your community engagement.
2. Embrace the intersection of destination stewardship, sustainability and DEI.
3. Create a culture of inclusion in the workplace and local industry community.
4. Be deliberate about workforce development with a focus on DEI.
5. Implement deliberate and transparent communications in all parts of your community.
6. Engage and support diverse local businesses and community creators.
7. Review and refine your community engagement strategy to incorporate DEI.
8. Evolve your marketing to develop imagery and content that is welcoming and inclusive to all.
9. Develop success metrics to celebrate progress and growth.

See Section 4: Diversity, Equity & Inclusion for the full report on What to Know & What to Do

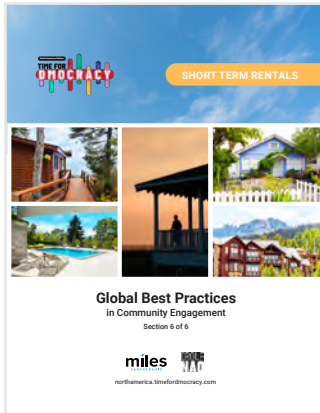


## MEDIA & COMMUNICATION

Supporting productive communication, discussion and debate on tourism within the local community is a critical responsibility for DMOs. This requires leading and facilitating effective communication based on the specific interests of local residents, business and other stakeholders. DMOcracy identified eight key areas for action for DMOs:

1. Expand your media and communications programs to include your local community.
2. Have an up-to-date communications (including crisis communications) plan.
3. Continually monitor traditional media and social media.
4. Build strong relationships with key opinion leaders and advocates for tourism.
5. Practice the 3-5-7 Rule and focus on simple, consistent messaging.
6. Embrace the power of positive messaging.
7. Complement facts with relatable stories from locals.
8. Add online solutions to your communication strategies.

See Section 5: Media & Communications for the full report on What to Know & What to Do



## SHORT TERM RENTALS

The rapid growth of short-term rentals (STRs) in North American communities has presented a range of opportunities and challenges. STRs are in many destinations a significant contributor to the tourism industry, and it is now important for most DMOs to play an active role in their marketing and management. DMOcracy identified eight areas of focus:

1. Get engaged—start early and stay involved as a partner in STR management and marketing.
2. Know the sector—ensure there is a robust system of research, consultation and data collection.
3. Integrate STR management and marketing with your overall tourism strategy.
4. Help develop or update your community’s STR management plan and regulations.
5. Customize STR management—target by neighborhood, housing type and/or type of host.
6. Support industry self-regulation—including industry standards and guest education.
7. Ensure inclusive STR registration—implement a simple, low cost and broad-based STR registration system.
8. Collect and allocate STR tax revenue, including funding for your DMO’s activities.

**See Section 6: Short Term Rentals for the full report on What to Know & What to Do**

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\*Destination Marketing and/or Management Organizations including official National, State, Provincial, Regional or City Tourism Organizations of all types are collectively defined under the acronym “DMO” in this report.

### References & Sources:

- i. Resident Sentiment Towards Tourism, Longwoods Intl. Research Destination International Advocacy Summit Oct. 2022
- ii. Time for DMOcracy Survey of 292 North American and European DMOs, August 2022
- iii. *ibid.*
- iv. *ibid.*

North American Edition

# TIME FOR DEMOCRACY

## COMMUNITY PARTICIPATION



## Global Best Practices in Community Engagement

Section 1 of 6



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

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



### Knowledge Partners on Community Participation

Thank you to our Knowledge Partners who contributed their insights and expertise to the Community Participation section of the Time for DMOcracy report:



### Program, Agency and Association Partners in Time for DMOcracy (North America)

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For a full list of the partners & supporters of Time for DMOcracy see each section of the report, the European edition and TimeforDMOcracy.com

# Introduction

Community participation models are at the heart of this global research and education project. For community engagement to be successful, local communities must be consulted with and involved in how tourism is developed and managed. Community participation models guide the formal structures, processes and management of engagement and how to involve the community in important decisions regarding the future of tourism in the destination.



Lead Author: Chris Adams, Head of Research & Insights at Miles Partnership. In collaboration with the team at Miles Partnership and other partners in the Time for DMOcracy study.

## At a Glance

- Community or citizen participation models are part of a broader international effort to build more open and inclusive governance. These initiatives promote “the principles of transparency, integrity, accountability and stakeholder participation” (i)
- The Time for DMOcracy global research project highlighted that the tourism industry is falling far short in reaching open government principles.
- A major survey of sentiment towards tourism highlighted that only a small minority of North American residents (33% in Canada, 29% in the US) agreed with the statement, “Residents are consulted when major tourism development takes place in [my] area” (ii)
- Our review of community participation models in tourism identified four major types of community participation models, including strategy driven consultation, community advisory committees/boards and stand-alone tourism councils involving residents, businesses and local government. Tourism can also be integrated into community participation entities seeking a broader range of feedback from residents.

### WHAT TO KNOW

- A majority of DMOs see strong benefits in seeking community participation, including its ability to generate innovative ideas surrounding how tourism is developed or managed and the importance of community participation in ensuring the social license of tourism operations.
- DMOs also noted a range of potential problems, including that the community may highlight “issues that we have little or no control over” or that community input may be “dominated by a few loud voices” (iii)
- The European edition of Time for DMOcracy has additional information on Community Participation Models, including more on citizen assemblies, online participation platforms, volunteering and citizen science, participatory placemaking, participatory strategizing and participatory budgeting (iv)

## WHAT TO DO

Time for DMOcracy identifies 6 practical recommendations for how DMOs can kick start and develop their community participation models:

1. Review and Refine Your Informal Engagement
2. Select a Participation Model that Works for You and Your Community
3. Build in These Six Best Practices in Community Participation Models:
  1. Get Started Early with Community Participation
  2. Provide a Clear, Meaningful Role for Community Participation
  3. Support Informed Debate and Recommendations
  4. Amplify Community, Business and Government Voices
  5. Encourage Inclusive, Diverse Representation
  6. Integrate Resident Sentiment Research and Destination Management
4. Expand Your Online Community Participation Tools
5. Invest in Volunteer Opportunities for Your Community
6. Explore Community Participation in How Tourism Taxes Are Spent

## RESOURCES

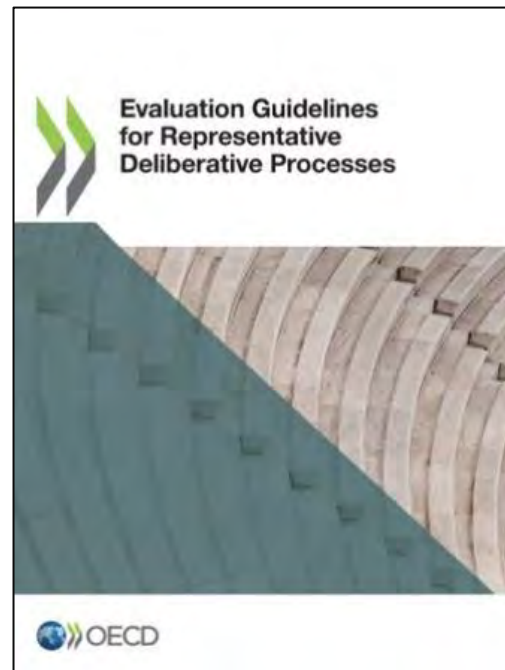
We highlight and share a range of critical research, case study examples and other resources to inform your action. See Page 21.

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### a. Introduction to Community (Citizen) Participation

Community or citizen participation models are part of a broader international effort to build more open and inclusive governance. Encompassing themes such as deliberative and participatory democracy, these initiatives promote “the principles of transparency, integrity, accountability and stakeholder participation” (v). The COVID-19 pandemic amplified the importance of this goal and of addressing rising levels of distrust towards both public and private institutions(vi). The Organization for Economic Cooperation and Development (OECD)—an international organization of 38 nations committed to both democracy and open markets—is leading much of this work. The OECD emphasizes that good government is good for business and good for tourism. At a practical level, open government and community participation attempts to enhance citizens’ and residents’ involvement in all types of decisions that affect their lives.

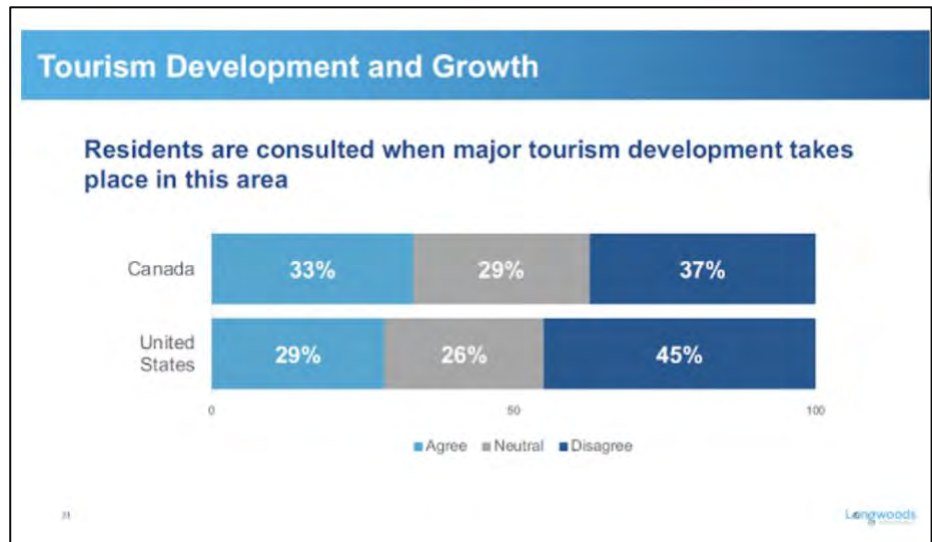


#### How Residents Perceive Tourism in Their Community

The Time for DMOcracy global research project highlighted that the tourism industry is falling short in reaching open government principles. A major survey of sentiment towards tourism highlighted that only a minority of North American residents (33% in Canada, 29% in the U.S.) agreed with the statement, “Residents are consulted when major tourism development takes place in [my] area” (vii).



Only a minority of North American residents (33% in Canada, 29% in the US) agreed with the statement, “Residents are consulted when major tourism development takes place in [my] area” (viii).



When North American DMOs were asked, only 17% assessed that their residents would “feel they have significant influence on tourism’s development and management” (ix). Taken together, these results emphasize the urgent need to build community participation and involvement in the planning and management of tourism.

**17%**  
 Of North American DMOs assessed that their residents feel they have significant influence on tourism’s development and management (Europe = 26%)

## b. Examples of Community (Citizen) Participation

The OECD has been both promoting and monitoring the adoption of community or citizen participation models. It has identified more than 289 cities, counties, states and provinces across its member countries using some form of community participation model across areas, including transportation decisions and healthcare (see below).



Figure 1 Examples of Community Participation Models span all sectors of society, including consultation entities in transport and healthcare. Pictured is a Canadian example.

### c. Community Participation Models in Tourism

Tourism has been slow to invest in community participation models that support a greater degree of participatory democracy in communities. While 46% of DMOs that participated in the Time for DMOcracy survey indicated that they have made efforts around advisory boards, resident panels or other forms of community consultation, many of these efforts are related to strategy or planning processes or specific events requiring community input. There is a far smaller number of DMOs with more sophisticated and ongoing community participation models.

Our review of community participation models in tourism identified four major types of community consultation and participation ranging from event driven consultation to more permanent community participation entities.

## 1. Community Participation in a Strategy or Planning Process

A wide range of DMOs include some type of structured community consultation in the development or updating of a destination master plan or tourism strategy. This can include community meetings, focus group discussions and more formalized consultation bodies that meet during the planning process.

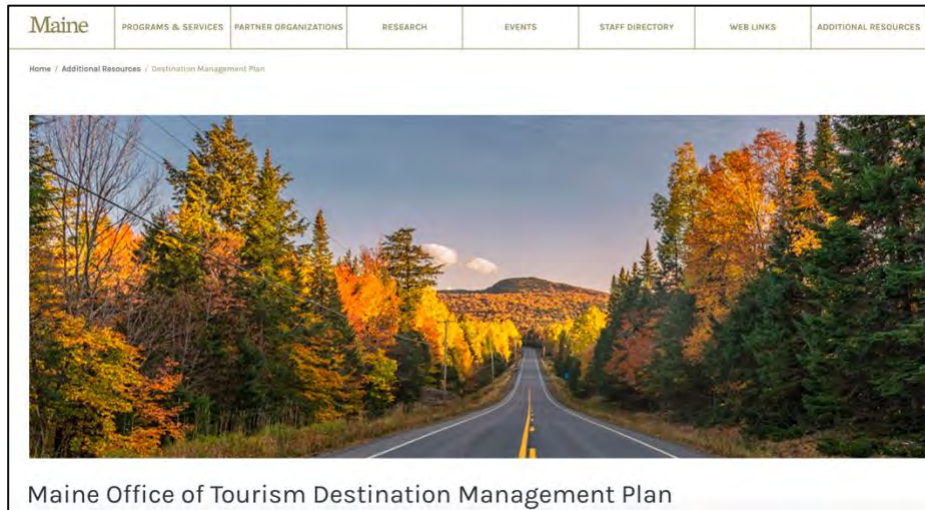


Figure 2. Many destinations such as the Maine Office of Tourism seek community participation when developing or updating their destination master plan and/or tourism strategies.

## 2. Broader Community Participation Models

A small but growing number of DMOs are actively involved in broader local government consultation entities that engage and empower residents to provide input on decisions in their communities on a wide range of topics, including tourism. [AnaheimFirst](#) is an example of this model(x).

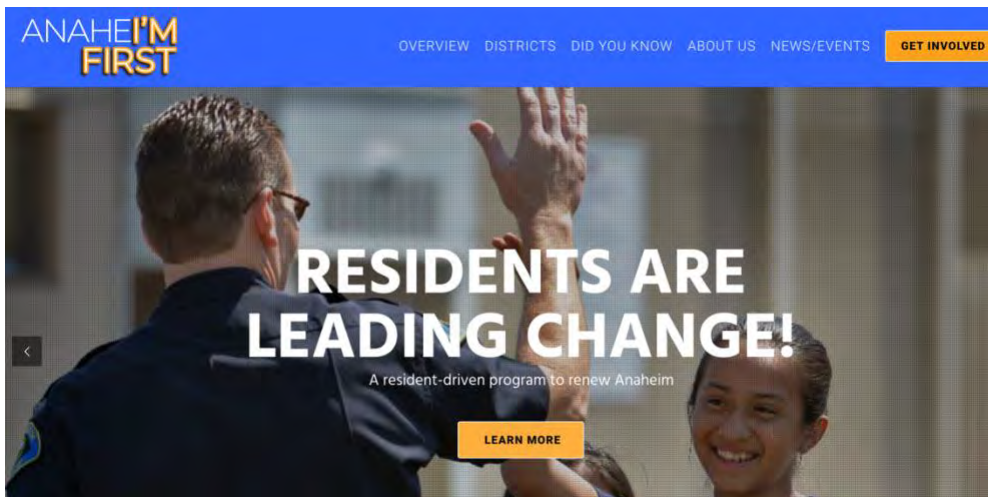


Figure 3. [ANAHEIM FIRST](#) is an example of a community participation model where residents provide input on a range of issues in their community, including tourism.

### 3. Tourism Advisory Councils

A larger number of DMOs run and support ongoing community advisory committees or groups. These are often attached to the DMO’s board, such as the [Discover Los Angeles](#) Community Advisory Board.



Figure 4 The Discover Los Angeles Community Advisory Board includes specific representation from six diverse communities, including African American, Hispanic, Native American, LGBTQ+ and Disabled Communities.

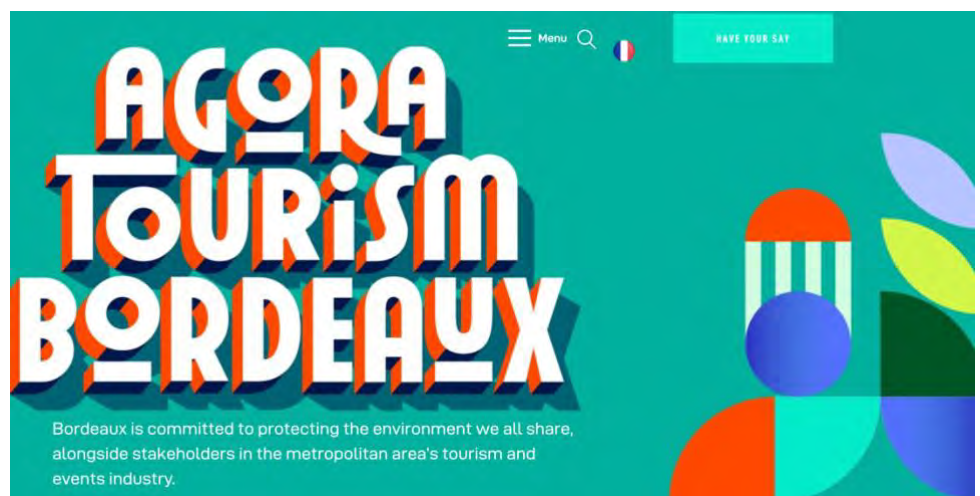
#### 4. Tourism – Government – Industry Councils

A handful of destinations, mostly in Europe, have developed standalone community participation entities with a greater degree of autonomy and authority.



Figure 5. The Barcelona City Tourism Council has been operating for over five years, attempting to provide a more direct way for residents to influence the development and management of tourism in the city.

In community participation, tourism entities can either set up and manage their own community participation model as in [Agora Tourism in Bordeaux, France](#), or the [City Tourism Council in Barcelona](#), Spain, or they can work within a broader community participation model as in [ANAHEI'M FIRST](#) in Anaheim, California.



In both approaches it is important for the DMO to collaborate with other government, business and community entities. For example, ANAHEIM FIRST is a 501c not for profit supported by the city, Visit Anaheim, the Anaheim Chamber of Commerce and Anaheim Community Foundation among other partners. It is focused on empowering local neighborhoods to provide input on important decisions, including the development and management of tourism.

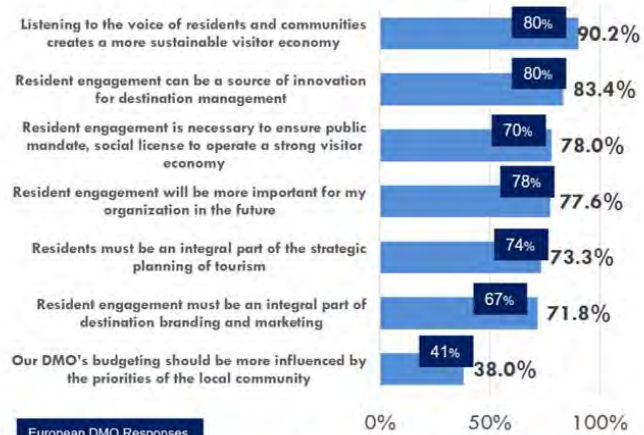
### d. Strengths and Weaknesses of Community Engagement

In designing community participation models, it is important to address the perceived strengths and weaknesses of engaging with residents. These were summarized in responses to two questions included in the survey of 292 North American and European DMOs on community engagement perceptions, policies and plans.

The vast majority of DMOs (78% to 90%) identified community engagement as supporting a more sustainable visitor industry, as a source of innovative ideas and as critical to maintain social license of tourism in the community. A majority of DMOs also noted that the local community is “integral” to destination branding and marketing and highly important when developing tourism strategies and planning.

#### ORGANIZATION'S EXPERIENCE WITH RESIDENT & COMMUNITY ENGAGEMENT

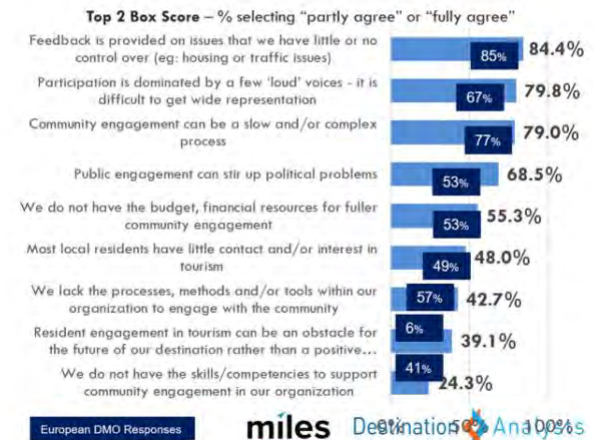
Top 2 Box Score – % selecting “partly agree” or “strongly agree”



European DMO Responses

A range of concerns were also flagged as important to consider in community participation. Around 80% of DMOs noted that residents may highlight “issues that we have little or no control over” or that the input may be “dominated by a few loud voices – it is difficult to get wide representation.” A similar majority noted that community participation can be “a slow and/or complex process” and around 66% noted that “public engagement can stir up political problems.”

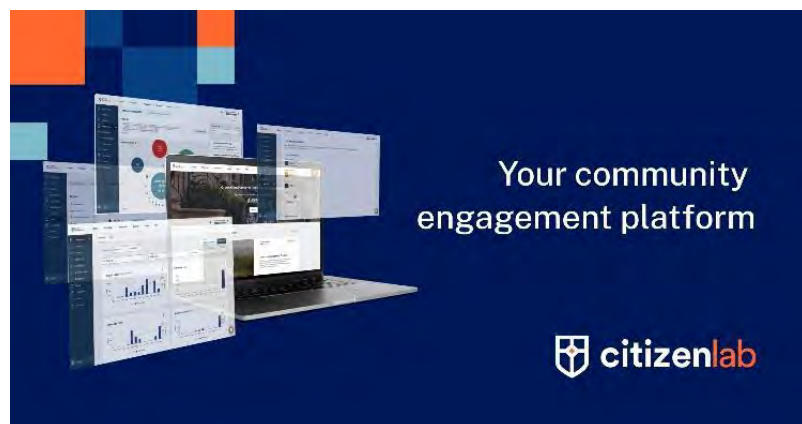
**ORGANIZATION'S CHALLENGES WITH RESIDENT & COMMUNITY ENGAGEMENT**



**e. Online Community Participation Platforms**

Interestingly, online community participation platforms continue to increase. Companies from [Granicus](#) (e.g., Open Cities), [Hivebrite](#) and [CitizenLab](#) each offer digital solutions that allow residents or businesses to communicate with each other about local issues including tourism.

Users can query and engage with information on tourism issues and provide suggestions, comments or feedback. Such platforms can enlarge outreach efforts—reaching busy or traveling residents, those who are concerned about public speaking or residents with disabilities who may be unable to participate at in-person events. Such platforms are a useful compliment, but not a replacement to in-person community engagement.



## f. Local Greeters, Ambassador and Volunteer Programs



Some North American destinations and a wide range of European destinations (e.g., [Lyon, France](#)) engage with locals by welcoming, hosting and guiding visitors using greeter, ambassador and event programs. Many are volunteer based, and some are paid—either with a fee or request for gratuity. Airbnb’s expanding [Experiences program](#) also

centres around encouraging locals to share their passion and expert local insights. Many events that are run or supported by DMOs in destinations such as Aarhus, Denmark, rely heavily on local volunteers. Such programs build connections with residents, creating both part-time opportunities and advocates for tourism from within the community.

## g. Participatory Budgeting

An emerging trend in community participation is seeking resident input on how tourism taxation revenue is spent and/or the budget priorities of the DMOs.

In the Netherlands, the regional tourism organization, [Toerisme Veluwe Arnhem Nijmegen](#) facilitates an innovative model for resident input on how a proportion of visitor taxation revenue is spent.

**toerisme** veluwe  
arnhem  
nijmegen

**HELP JIJ MEE DE  
 GEMEENTE RHEDEN  
 NOG BETER, LEUKER &  
 MOOIER TE MAKEN?**

**ik**

Total donated:  
 €227.936,92  
 Initiatives started:  
 234

Op 29 oktober  
 ontvang je de  
 nieuwe  
 waardecheque  
 van € 7,50!



Locals each receive a vote representing a small proportion of visitor tax revenue, worth 7.50 euros each, to apply to a preferred community project. Locals are invited to identify and promote a local project they would like to see happen, such as a new playground or walking/cycling trail. Residents then apply their vote and those that reach a threshold of support get funded. To date, 234 local community projects have been funded with total funding of 228,000 euros.

In a North American example, the Six Neighbourhood Councils in the [ANAHEI'M FIRST](#) community engagement program includes their input on the spending priorities in their neighbourhoods, including the use of tourism tax revenue(x).

Resident input on the DMO budget itself is typically limited to the advice of formal community participation models. For example, Barcelona's City and Tourism Council provides input during the budgeting process on the priorities of [Turisme de Barcelona](#)—the official visitor organization(xi). Such input is typically viewed with caution by other DMOs. Only a small number of DMOs across North America (38%) and Europe (41%) noted in the Time for DMOcracy survey(xii).



**Tourism and Climate Change: A Citizen Panel**



Current research suggests that climate change is likely to have significant impacts on New Zealand's tourism sector, an important and valuable industry for New Zealand.

Another area of emerging community participation is on climate change. This is part of the growing public concern in many countries on the need for more assertive action. Examples include the [Culture and Climate Change Citizen panel](#) in New Zealand and examples from [Camden in the UK](#), this [Danish Citizen Assembly on Climate Change](#) plus many more.

# What To Do

## 6 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Review and Refine Your Informal Engagement
2. Select a Participation Model That Works for You and Your Community
3. Build in These Six Best Practices in Community Participation Models:
  - a. Get Started Early with Community Participation
  - b. Provide a Clear, Meaningful Role for Community Participation
  - c. Support Informed Debate and Recommendations
  - d. Amplify Community, Business and Government Voices
  - e. Encourage Inclusive, Diverse Representation
  - f. Integrate Resident Sentiment Research and Destination Management
4. Expand Your Online Community Participation Tools
5. Invest in Volunteer Opportunities for Your Community
6. Explore Community Participation in How Tourism Taxes are Spent

### 1. Review and Refine Your Informal Engagement

Formal community participation models build on informal engagement in your community. Review and refine how you, your staff and trusted partners engage informally with your community, from casual coffee shop conversations with elected officials, to attending local business or neighborhood events that allow you to understand the mood of your community.



## 2. Select a Participation Model That Works for You and Your Community

There are a range of participation model options to consider, from community advisory committees/boards (e.g., the Discover Los Angeles Community Advisory Board), to stand alone tourism councils, including residents, businesses and local government (e.g., the Barcelona City Tourism Council). You can also work with your local government partners to include tourism more clearly in a broader community participation (e.g., ANAHEI'M FIRST).

## 3. Build in These Six Best Practices in Participation Models:

From our survey of DMOs, review of existing research and assessment of existing community participation models we identified these six best practices for the setup and management of a community participation model:

### 1. Get Started Early with Community Participation

We heard from a range of destinations that they wished they had started their community participation models far earlier. An early investment in community participation helps avoid tourism becoming a contentious, political issue that impacts the DMO. For example, Barcelona noted that they should have started the City and Tourism Council at least five years earlier than they did—before tourism became the “hot button” issue that it did in their community.



**2. Provide a Clear, Meaningful Role for Community Participation**

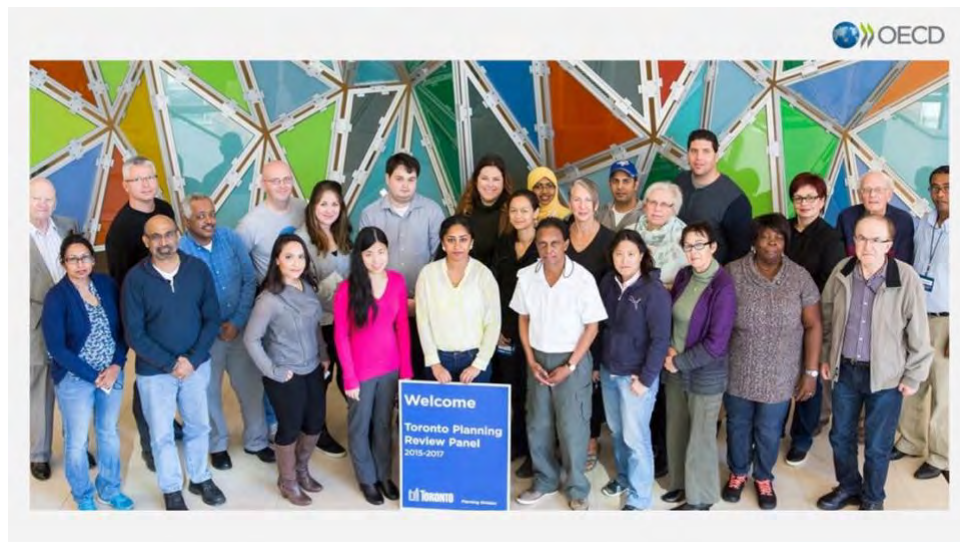
The community participation entity should have a clear and agreed-upon role in providing advice on the management and marketing of tourism in a destination. The entity should provide input on all “meaningful issues,” including important decisions on tourism’s development or management, that impact the community(xiii). While their recommendations are typically advice-only, all relevant public/private organizations with a significant role in managing tourism in a destination need to agree to consider the community’s input as an important part of their decisions. Clear reporting and feedback should then explain how the community feedback was incorporated into final decisions made by these organizations.

**3. Support Informed Debate & Recommendations**

To ensure their input is useful and productive, the community participation entity should be briefed and supported to provide timely, well-informed recommendations. The OECD suggests a 3-step process in their best practices: “orientation and learning,” “deliberation” and “drafting recommendation” (xiv).

**4. Community, Business and Government Voices**

Many community participation models include representation from residents, local businesses and local government. If you choose to have a dedicated local resident forum, ensure you have other mechanisms for consulting with your local business community and local government. The latter includes engaging with the range of agencies and departments that impact tourism, including parks and recreation, transport, housing, planning and others. This engagement ensures you can identify the right agencies who can help act on issues that you “have little or no control over”(xv).



**5. Inclusive, Diverse Representation**

Whatever form your community participation model takes, you should ensure there are specific efforts made to reach a truly diverse and representative group of residents and local businesses. This ensures that community feedback will not be “dominated by a few loud voices” (xvi). The OECD suggests a range of ways to ensure a broad, representative group of residents, including a lottery system. Ensure you have representation from across your community—a mix of age, geography, ethnicity and professions, as well as representation by people with disabilities and immigrants. Use this outreach to ensure you have a broad, representative sample in your resident sentiment research. This includes building long-term relationships with a wide range of community groups, either directly or through trusted partners. See the Time for DMOcracy section on Resident Sentiment Research.



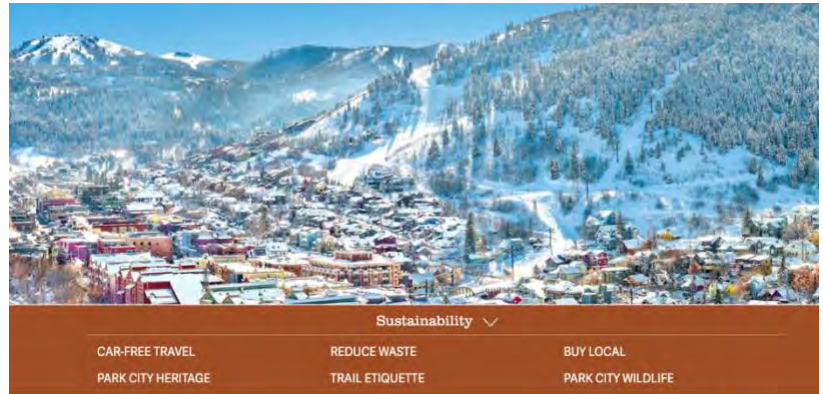
**6. Integrate with Your Destination Management**



Community participation often starts with developing or updating a destination master plan or sustainable tourism strategy. Ongoing community participation is best undertaken within the framework of this strategy/plan. This provides a “road map” for the community’s involvement in specific destination management activities and goals.

#### 4. Expand Your Online Community Participation Tools

Online tools and platforms supplement, but do not replace in-person community engagement. While there are a range of specialist online community participation platforms available, it is best to expand your engagement using your DMO's existing communication assets. Enhance your own website, email communications, social media and PR efforts to keep residents informed on issues and developments in tourism and to gather feedback. This digital communication along with informal consultation (see #1 above) will provide a sound foundation for considering if you need a specialist community participation platform.



### A Sustainable Park City

#### The Legacy We Share.

People who visit Park City are drawn to the breathtaking beauty of the land, the creative culture of our thriving communities, and the sustainable values woven into the very fabric of our town. As a community, we think of ourselves as a beacon of earth friendliness. With some of the **most ambitious climate goals** in North America, Park City's commitment to our cultural heritage and to sustainability includes sharing with visitors and locals alike how we can all strive to maintain the unique beauty and spirit of this community we call home.

#### 5. Expand Your Online Community Participation Tools

Review and consider expanding opportunities for community participation through volunteer programs that impact tourism. This includes working your partners' events—an area where volunteers can provide invaluable support. Consider targeted volunteer opportunities, especially for youth (e.g., youth internships or greeters programs). These engage younger residents in meeting and guiding visitors, provide invaluable work experience and can be a valuable addition to your staff and workforce development investments.



The European edition of Time for DMOcracy includes detailed information and advice on developing and managing volunteer programs with your community, including a range of case studies involving Brussels (see above), Arhus, Lyon (right) and more.



## 6. Explore Community Participation in How Tourism Taxes are Spent

While DMOs expressed caution over resident input into their budget priorities, there are powerful opportunities that come with facilitating community participation in how tourism taxes are spent. Getting resident input demonstrates the benefits of tourism—such as the creation of new public funding for the community—in a powerful way.



Arnhem in the Netherlands and Anaheim in California both facilitate community input into how some of the tax revenue generated from visitors is spent

# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. [Learning Lab 1: Citizen Participation Models](#) – featuring the OECD, Turisme Barcelona & Discover Los Angeles, May 2022
2. [OECD Open Government Resources & Toolkits](#)
3. [Trust in Government](#) – 2021 survey by OECD across 22 OECD nations. OECD, 2021
4. [Time for DMOcracy Survey of 292 North American and European DMOs](#), August 2022
5. [Community Awareness – Resident Sentiment Towards Tourism, Longwoods research presentation](#) at Destination International Advocacy Summit October 2022
6. [Case Study: Citizen Participation Campaigns, Palau & New Zealand](#), Time for DMOcracy, 2022
7. [Case Study: San Francisco Travel Association – SF Transportation Taskforce](#), Time for DMOcracy, 2022
8. [Case Study: Anaheim First Community Engagement](#), Time for DMOcracy, 2022
9. [Featured Research – AIJIA Framework for Inclusive Community Development Through Tourism](#) Sep-22
10. [Featured Research – Community Engagement Done Differently](#), September 2022
11. [Featured Research – Eight Ways to Institutionalize Deliberative Democracy](#), September 2022
12. [Featured Research – Towards Destination Stewardship](#), September 2022



## References & Sources:

- i. Introduction to the [OECD Open Government resources](#)
- ii. 'Residents Feeling of Influence on Tourism' Question - Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>
- iii. Top responses from the Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>
- iv. Time for DMOcracy European Edition report, January 2023 – see [www.timefordmocracy.com](http://www.timefordmocracy.com)
- v. Top responses from the Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>
- vi. OECD Open Government principles and resources: <https://www.oecd.org/gov/open-government>
- vii. Trust in Government – results of 2021 survey by OECD across 22 OECD nations. OECD, 2021. (An equal proportion of respondents, ~41%, indicated broad trust vs. mistrust in their government institutions).
- viii. 'Tourism Development & Growth Questions' – Community Awareness – Resident Sentiment Towards Tourism, Longwoods research presentation at Destination International Advocacy Summit October 2022
- ix. 'Residents Feeling of Influence on Tourism' Question - Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>
- x. AnaheimFirst is a 501c not for profit <https://anaheimfirst.org/>
- xi. See more information on the [Barcelona City Tourism Council here](#).
- xii. Page 25, Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com/>
- xiii. Good Practice Principles for Deliberative Processes for Public Decision Making – [OECD Best Practices, 2021](#)
- xiv. Steps outlined in OECD Open Government Toolkit: <https://www.oecd.org/gov/open-government>
- xv. Top responses from the Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>
- xvi. Top responses from the Time for DMOcracy Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com>

## Other Resources:

Staying Power: [The Effects of Short-Term Rentals on California's Tourism Economy and Housing Affordability](#), Milken Institute, 2022

[3 Big Questions in Community Engagement](#), Signe Jungersted, Scott Beck, Gracen Chungath and Antonia Koedijk, May 2022

[Engage Liverpool: day tripper campaign case study](#), Gary Proctor, May 2022

[Innovative Citizen Participation and New Democratic Institutions - Catching the Deliberate Wave](#), OECD, October 2020

[Evaluation Guidelines for Representative Deliberative Processes](#), OECD, November 2021

[Towards Destination Stewardship: Achieving Destination Stewardship through Scenarios & Governance Diagnostics Framework](#), World Travel & Tourism Council, 2021

[The Interplay of Governance, Power and Citizen Participation in Community Tourism Planning](#), Jordan, Vogt, Kruger, & Grewe, Journal of Policy Research in Tourism, Leisure and Events, 2013

[IAP2's Public Participation Spectrum](#), IAP2, 2014

[Finding our Cornerstone: An Advocacy Paper on Destination Organizations Becoming a Community Shared Value](#), Destinations International

[A Manager's Guide to Evaluating Citizen Participation](#), IBM Centre for The Business of Government, 2012

[The End of Tourism as We Know It](#), Strategy: Towards 2020, Wonderful Copenhagen, 2017-2020

North American Edition

# TIME FOR DEMOCRACY

# RESIDENT SENTIMENT RESEARCH



## Global Best Practices in Community Engagement

Section 2 of 6



[northamerica.timefordmocracy.com](http://northamerica.timefordmocracy.com)

## Acknowledgement and Thanks

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

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

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



### Knowledge Partners on Resident Sentiment Research

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



### Program, Agency and Association Partners in Time for DMOcracy (North America)

 IN ASSOCIATION WITH 	ACADEMIC PARTNERS:  	OTHER AGENCY PARTNERS:    	ASSOCIATION PARTNERS:    
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For a full list of the partners & supporters of Time for DMOcracy see each section of the report, the European edition and TimeforDMOcracy.com

# Introduction

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



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

## At a Glance

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

### WHAT TO KNOW

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

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

## WHAT TO DO

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

## RESOURCES

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

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### a. Resident Sentiment Research in North America

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

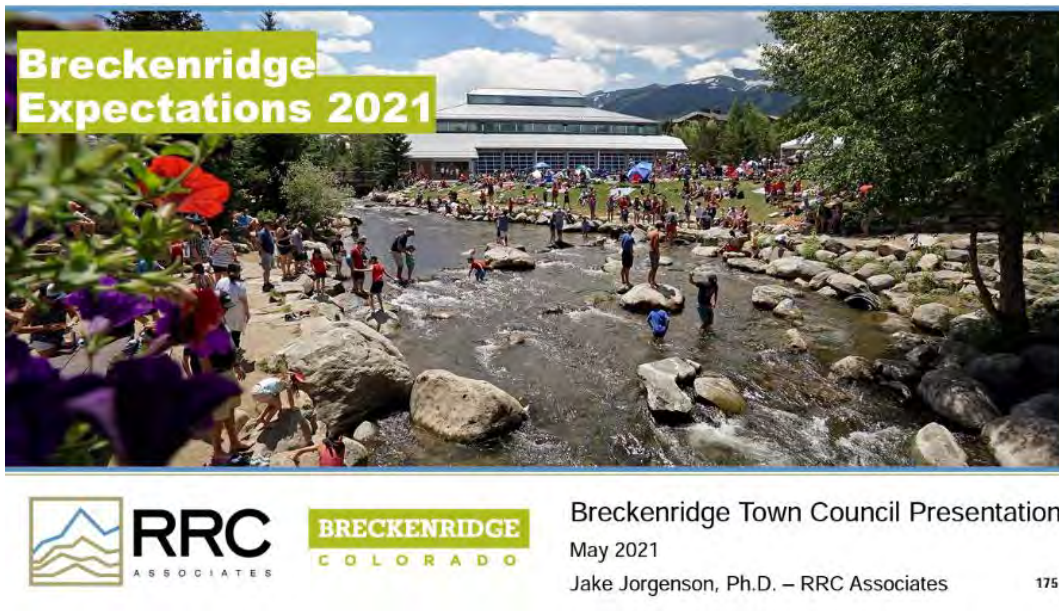


Figure 1 The Breckenridge Tourism Office has undertaken [detailed resident sentiment research](#) down to a neighborhood level since 2016.

## b. Resident Sentiment Data Collection Strategies

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

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



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



### c. Destination Collaboration is Key

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

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



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



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

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

#### d. National and International Studies and Benchmarking Data

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

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



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

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

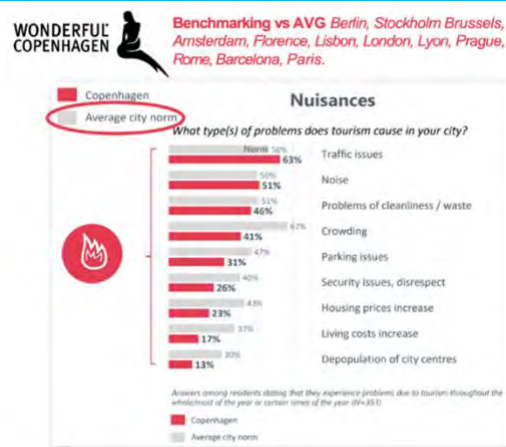


Figure 6 More detailed benchmarking of resident research is possible if a state or province organizes an integrated resident research reporting process or works with a research firm that consults with a range of DMOs and offers benchmarking data—as in this example for Copenhagen (TCI Research).

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

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

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



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

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

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

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



- o A complete 5-year plan for building a responsible tourism
- o Data-driven content (Travelsat® / RSI® Index / GDS / Workshops...)
- o 4 strategic axes / 32 actions planned with evaluation KPIs

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

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

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

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

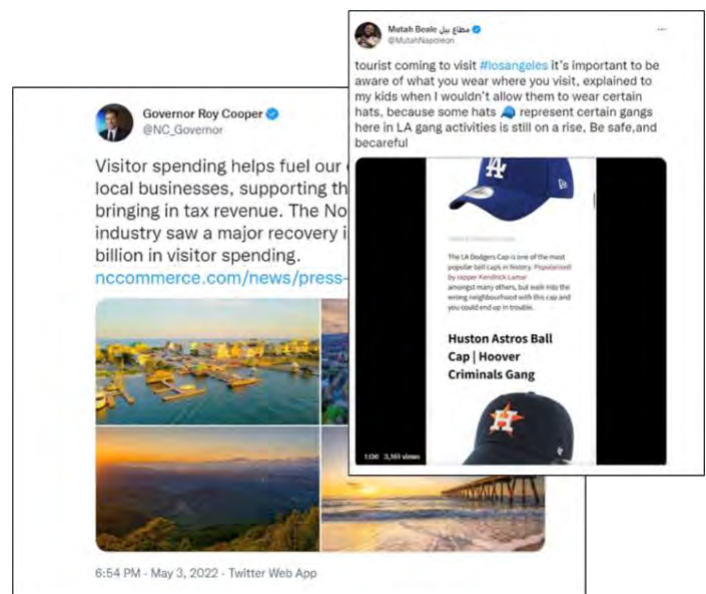


Figure 9 Social media sentiment analysis tools used to assess the reach and content of online conversations about a destination can also be used to help identify trending or topical issues that should be monitored or researched.

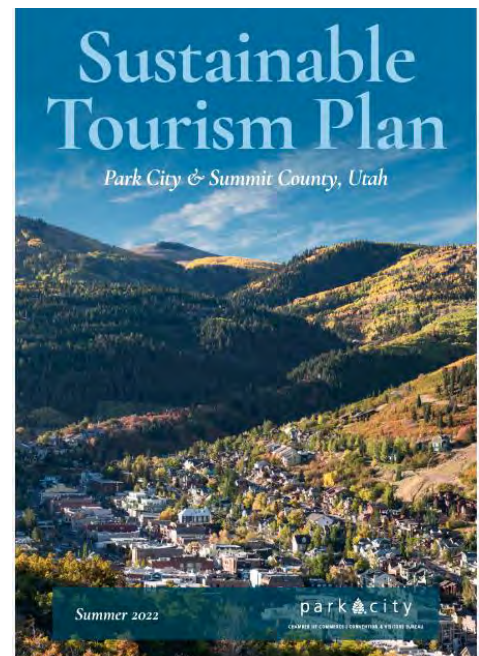
## g. Resident Sentiment Research in Destination Management

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

## h. Resident Sentiment Research Informing KPIs

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

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



# What To Do

## 8 PRACTICAL RECOMMENDATIONS AND ACTIONS

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

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

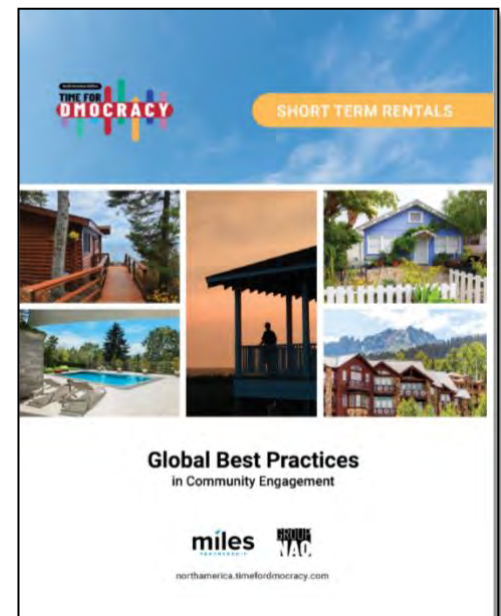
A majority of DMOs are missing an opportunity to hear the voices of those who are impacted by tourism. DMOs need a longitudinal approach to resident sentiment research to stay on top of emerging issues and improve understanding of residents' perception of tourism. Design and distribute tools to measure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

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



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

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





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

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

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

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

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

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

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

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

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

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

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

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



# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

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

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- [Time for DMOcracy – Agora: Tourism Bordeaux – featuring Julie Benisty-Oviedo](#), Miles Partnership, Bordeaux Tourism & Congress, May 2022
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# Global Best Practices in Community Engagement

Section 3 of 6



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## Acknowledgement and Thanks

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

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

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



### Knowledge Partners on Tourism & Hospitality Workforce

Thank you to our Knowledge Partners who contributed their insights and expertise to the Tourism & Hospitality Workforce section of the Time for DMOcracy report:



### Program, Agency and Association Partners in Time for DMOcracy (North America)



For a full list of the partners & supporters of Time for DMOcracy see each section of the report, the European edition and TimeforDMOcracy.com

# Introduction

Early in our consultation, we highlighted workforce and staffing as a priority in the tourism sector due to its strong impact on community. Workforce and staffing, an ongoing issue in tourism and hospitality, has been made considerably worse by the COVID-19 pandemic. The workforce challenge is now structural, and improvement will involve a range of actions by multiple private and public organizations—including the destination management organizations (DMOs).



## At a Glance

### WHAT TO KNOW

- An estimated 5% of all tourism and hospitality jobs across North America remain vacant as of late 2022.
- Staff shortages in tourism have long-term causes, and shortages were worsened during the COVID-19 pandemic.
- Solving structural issues in workforce and staffing will require sustained effort from both the private and public sector.
- Tourism and hospitality need to address a range of challenges, including high staff turnover, increased competition from other industries and the adverse perceptions in many communities—often as a low wage industry with demands for seasonal and shift work.
- Tourism and hospitality have developed a heavy reliance on foreign workers in many destinations. While their return offers a critical solution for short-term staffing, the industry needs to build a stronger, community-based source of employees in the long term.
- In our survey of DMOs, 14% indicated some active involvement in addressing workforce issues. For example, an increasing number of destinations are investing in or supporting workforce initiatives, including promoting job opportunities and/or collaborating with partners to train and educate current or potential workers.



**WHAT TO DO**

Time for DMOcracy identifies nine practical recommendations for how DMOs can address immediate staffing shortages in tourism and hospitality and build stronger community participation in its work and career opportunities:

1. **Monitor, research and understand** workforce and staffing issues in your industry and community.
2. **Engage with high schools and tertiary institutions** to develop educational opportunities in the tourism and hospitality industry.
3. **Promote and support recruitment efforts**, including marketing job vacancies and hosting job fairs.
4. **Be an advocate** for the tourism and hospitality industry. Work with partners to promote career benefits and opportunities.
5. **Invest in high-value tourism** that is operational year-round and resilient.
6. Help **build high-quality** tourism careers
7. Support **competitive wages, working conditions and advancement opportunities**.
8. Facilitate **affordable and accessible housing and childcare** for workers.
9. **Strengthen the coordination between public and private organizations** to make long-term investments in the workforce.

**RESOURCES**

We highlight and share a range of critical research, case study examples and other resources to inform your action. See Page 19.

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### a. Staff Shortages

The economy is suffering from a workforce crisis with 10.7 million job openings in the U.S. and just 5.9 million unemployed Americans as of late 2022 (i). In Canada the unemployment to job vacancy ratio is at a historic low (ii). This is the result of both immediate and long-term factors. With an aging population, the working age population across many North American and European destinations is in decline (iii). An estimated 5% of all tourism and hospitality jobs across North America remain vacant as of late 2022—with companies unable to find workers (iv). Making the issue worse, and highlighting broader, ongoing challenges in the sector, the quit rate in tourism and hospitality has persistently been almost double the rate compared to the wider economy (v).

### QUIT RATES IN THE LEISURE & HOSPITALITY INDUSTRY VS. TOTAL PRIVATE SECTOR

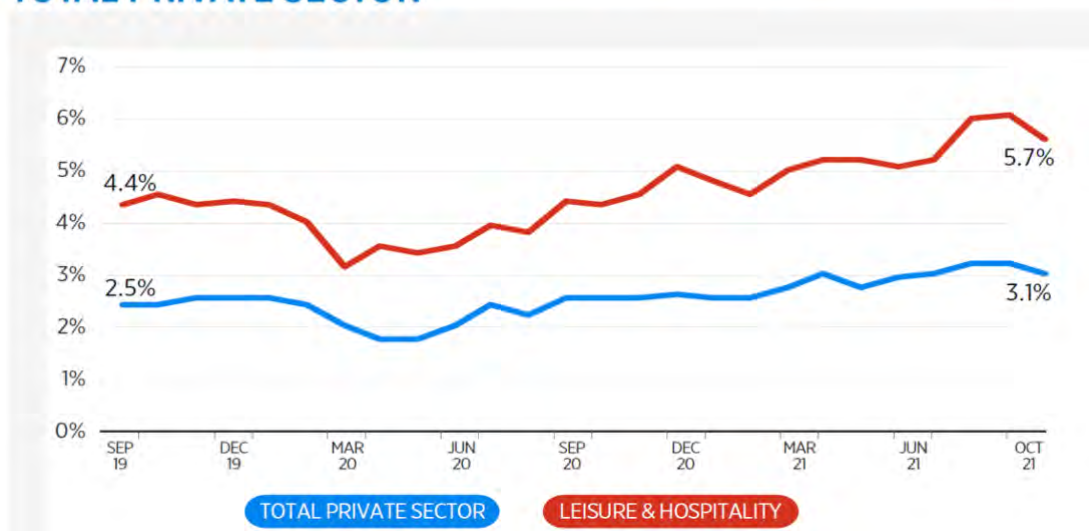


Figure 1 Retaining staff has been a persistent long-term challenge in tourism and hospitality.

## b. Competition

With a static or shrinking workforce, tourism and hospitality is facing increased competition for jobs from other sectors. This is particularly true in industries with strong growth, including warehousing and distribution and healthcare. In the former, Amazon has been hiring at historically unprecedented levels. The company hired more than 1 million workers between 2016 and 2021— the fastest rate of any company in U.S. history (vi).

As The Wall Street Journal noted, “Amazon is emerging as a de facto wage-and-benefit setter for a large pool of low-skilled workers.” Amazon has raised the competition for lower wage, lower skilled jobs in tourism considerably.



Figure 2 Growth areas of the economy such as Amazon’s distribution business is greatly increasing competition for workers and/or their salary and benefit expectations



## c. Shifting Worker Priorities

As the demand for staffing becomes more competitive, workers’ expectations are also changing. In addition to wages, competition is based on priorities such as work-life balance, “meaningful work,” advancement opportunities and core benefits including healthcare. In a 2022 major study of U.S. workers, all these factors were rated between 8.2 and 8.7 on a 10-point scale—just below salary at 8.8 (vii). Offering jobs with competitive pay and broader benefits will be critical to the success of recruitment and retention efforts in tourism and hospitality.

Figure 3 World Travel and Tourism Council’s ‘Staff Shortages’ report looks at workforce issues across the U.S. and Europe including a reliance on foreign workers.

## **d. Reliance of Foreign Workers**

Long-term issues in attracting and retaining local workers have led the tourism sector in many destinations to rely heavily on overseas workers. In 2019 foreign-born workers constituted 16% of the tourism workforce in the United Kingdom (UK) and the European Union (EU) and nearly 20% in the U.S. (viii). In some destinations it is far higher. In communities trying to provide a local welcome and authentic sense of place, reliance on international workers is a challenge—and a vulnerability in the case of future interruptions to the flow of workers. While an important short-term solution to staff shortages, the sector needs to develop a long-term strategy to address the problem.

## **e. Impact of Covid-19**

The COVID-19 pandemic has negatively impacted staffing shortages. An estimated 60 million tourism and hospitality jobs were lost worldwide during 2020 alone (ix). Around a third of tourism jobs in the U.S. and Canada disappeared, resulting in many of these workers moving to other sectors (x). The pandemic highlighted the uncertainty of tourism-related work and the attractive compensation and benefits found in other sectors. This added to the “image liability” issues faced by the industry (see below).

## **f. Destination Management Organizations’ Involvement in Workforce Issues**

In our survey of DMOs, 14% indicated some active involvement in workforce issues (xi). To date this investment of time and resources has been in one or more of the five areas noted below.

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**In our survey of Destination Management Organizations, only 14% indicated some active involvement in workforce issues.**

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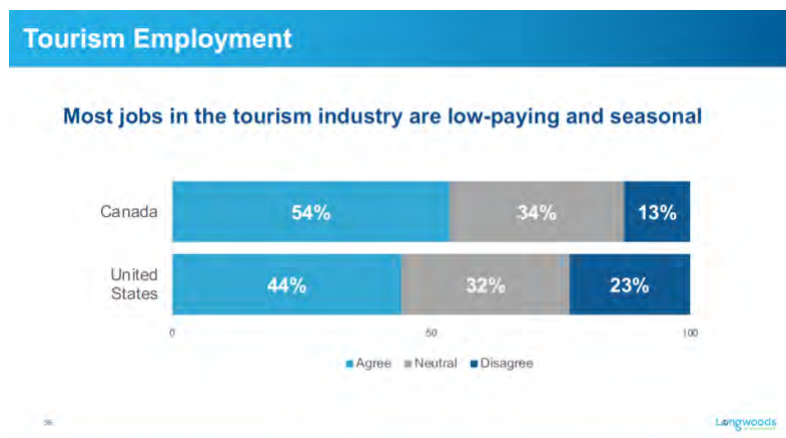
## g. Visa Issues

COVID-19 closed borders and halted access to foreign workers almost completely. Since the pandemic, foreign workers have been slow to return with significant limitations or delays in visas. As a short-term answer to the urgent staffing problems, organizations like U.S. Travel Association and Tourism HR Canada are prioritizing improving the visa experience. The visa process is an important point of advocacy for every DMO and their political representatives.

## h. Tourism’s “Image Liability” in the Community

Tourism and hospitality are facing a long-term perception challenge in its local communities—the quality of jobs in the sector has created an “image liability.”

Research on resident’s perception of tourism across North America highlights this problem with only a minority of respondents in the U.S. and Canada disagreeing with the statement: “Most jobs in the tourism industry are low-paying and seasonal” (xii).



This perception was worsened during the pandemic when the sector lost a large number of jobs in a short amount of time. In many communities, tourism and hospitality is not seen as a particularly strong or positive sector for jobs or long-term careers. Many in communities across North America see tourism jobs as “paying minimum wages,” “only available in the summer months” or “only offer part time employment or shift work” (xiii). A growing number of destinations are addressing these “image liability” perceptions with communications and education programs in their local communities. This includes [Scotland](#), [Ireland](#) and [New Zealand’s Go with Tourism Program](#).

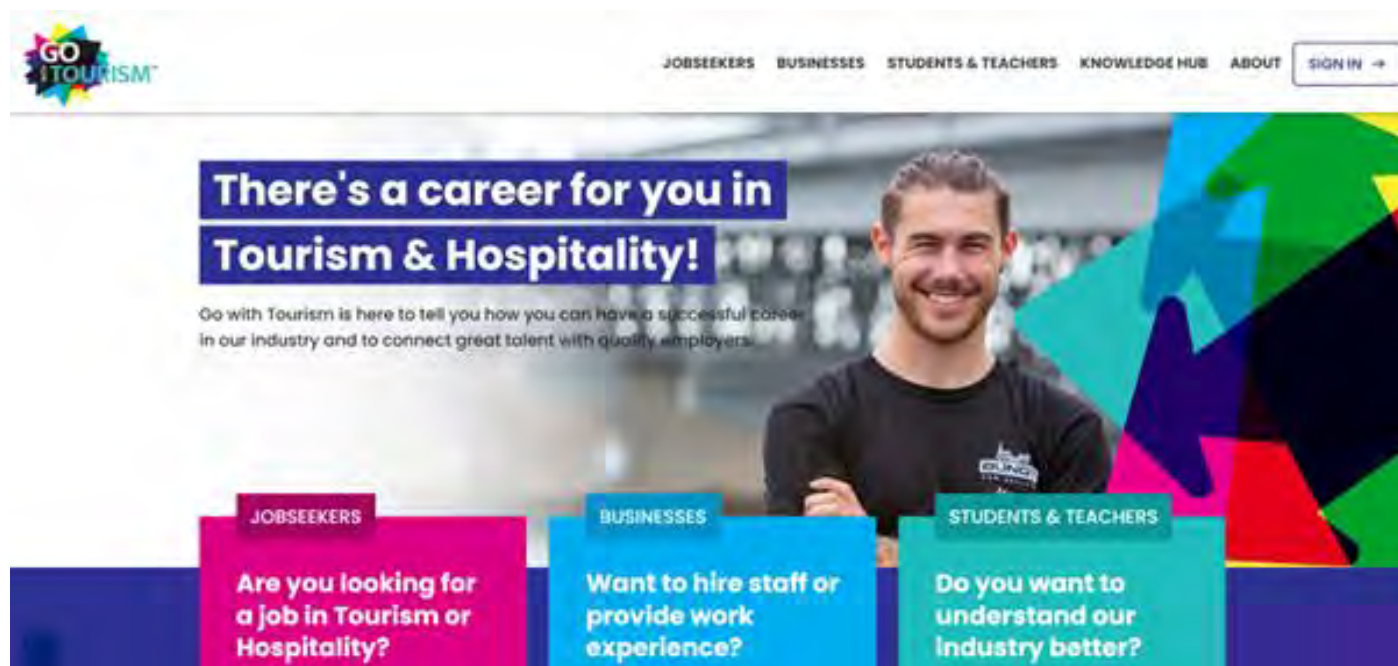


Figure 4 Go with Tourism is a New Zealand public-private sector program intended to highlight tourism as a career opportunity for New Zealanders and to connect jobs with job seekers.

## i. Education Partnerships

The development of high-quality and extensive educational programs for tourism and hospitality are crucial to highlighting the industry opportunities in communities. An increasing number of DMOs are working with tourism industry partners to help develop and enhance educational opportunities. Examples include enlisting tourism industry speakers for courses, coordinating work opportunities or internships in the sector, and formally adding courses into curriculum development.

## j. Recruitment & Retention

An increasing number of DMOs are also investing in or supporting recruitment initiatives, including promoting job openings and running career-related events such as job fairs. For example, the Greater Boston Convention & Visitors Bureau supported a town hall to consult on workforce issues and then [organised a job fair](#) - making targeted efforts to reach diverse communities across Boston.

In Kentucky, DMOs are supporting innovative private sector efforts such as [DV8 Kitchen's second-chance employment opportunities and employment workshops](#) aimed at workers recovering from substance abuse.

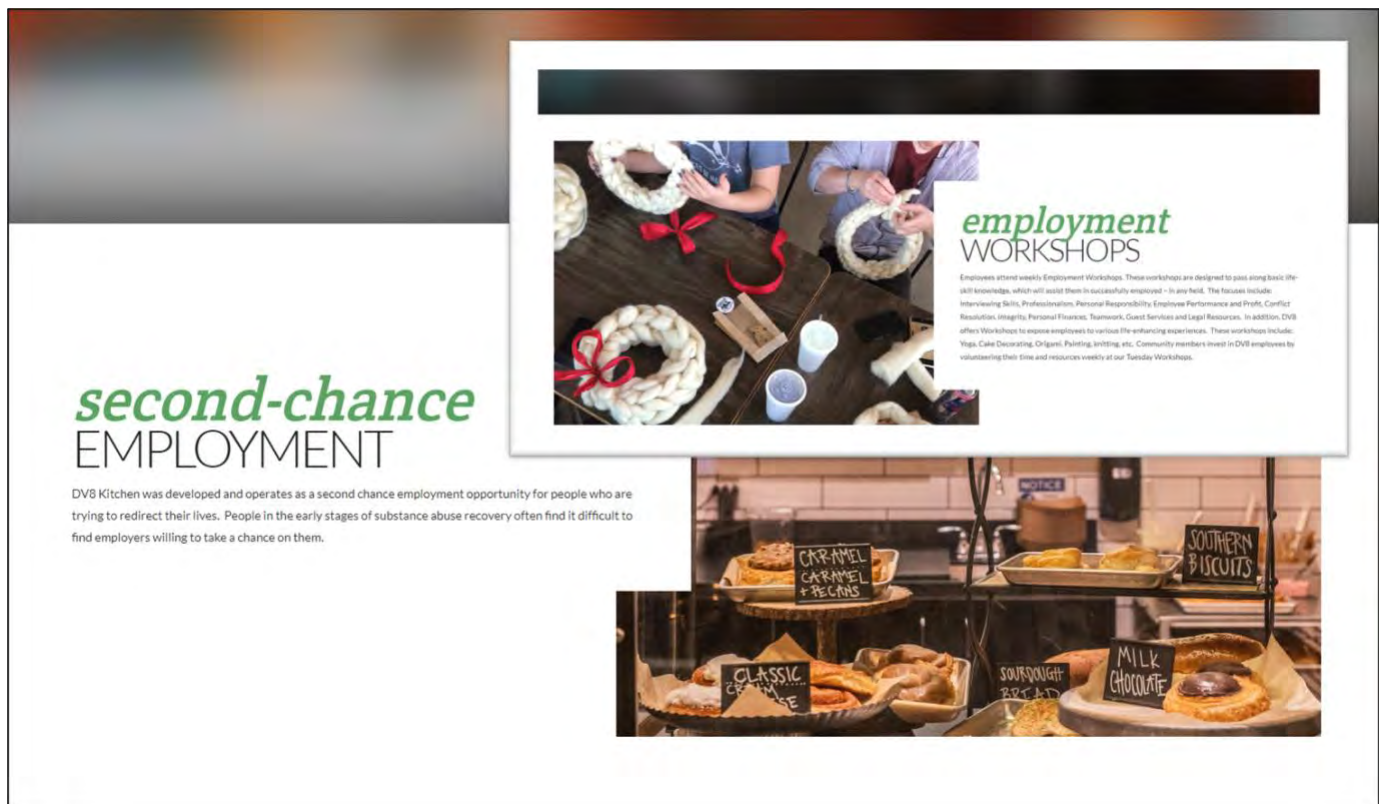


Figure 5 [DV8 Kitchen in Lexington, Kentucky](#) is an innovative hospitality business that reaches out to workers looking to redirect their lives after facing challenges such as substance abuse.

## k. Housing and Childcare

In many destinations, both housing and child care availability and affordability are a major impediment to recruiting and retaining staff. This challenge has become far worse in many communities as a result of climbing housing costs and the growing number of dwellings being rented out on Short-Term Rental (STR) platforms. The evidence of STRs' impact on housing affordability and access is mixed, but the perception remains a significant concern in many communities. In Colorado, some communities have voted to redirect tourism-related taxes away from destination marketing to [community issues such as workforce or housing](#) (xiv).

Communities such as Breckenridge have effective public and/or private sector initiatives that invest in both affordable housing solutions and child care for workers. See the case study on Breckenridge.



*Figure 6 Breckenridge is a mountain community where both private and public sectors are actively investing in affordable housing and child care solutions*

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The separate section of Time for DMOcracy looks at Short-Term Rentals, including its management and impact on communities (xiv)

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# What To Do

## 9 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Monitor, research and understand workforce and staffing issues in your industry and community
2. Monitor, research and understand workforce and staffing issues in your industry and community
3. Promote and support recruitment efforts, including marketing job vacancies and hosting job fairs
4. Be an advocate for the tourism and hospitality industry. Work with partners to promote career benefits and opportunities
5. Invest in high-value tourism that is operational year-round and resilient
6. Support competitive wages, working conditions and advancement opportunities
7. Help build high-quality tourism careers
8. Facilitate affordable and accessible housing and childcare for workers
9. Strengthen the coordination between public and private organizations to make long-term investments in the workforce

## 1. Monitor, research and understand workforce and staffing issues in your industry and community

This should encompass both informal consultation and more formal mechanisms such as surveying industry partners. Include perceptions of tourism and hospitality and careers in your resident sentiment research.

## 2. Engage with high schools and tertiary institutions to develop educational opportunities in the tourism and hospitality industry.

Collaborate with high schools, community colleges and universities—enlist contributing guest speakers, provide input on curriculum and class projects, or create internship opportunities that offer students real-world insights and experience.

This input can be local and informal or more formal at a state, provincial or national level.

[Tourism HR Canada](#) has a range of educational programs with partners such as Skills Canada, support for curriculum development and [online training through emerit.ca](#) (xv) to develop quality tourism and hospitality education across Canada. Employers are also important partners; for example, Disneyland recently invested another \$1 million in community workforce development (xvi) to expand the private and public initiatives in Orange County, California—also see recommendation four.



Figure 7 [Emerit.ca](#) from [Tourism HR Canada](#) provides online training courses, as well as support and guides, to help education partners develop their own curriculum in tourism and hospitality.

### 3. Promote and support recruitment efforts, including marketing job vacancies and hosting job fairs

Highlight job vacancies to your community and more broadly, and lead or support recruitment initiatives such as job fairs. An increasing number of DMOs are investing in these types of workforce marketing initiatives, including career fairs supported by the Greater Boston Convention & Visitors Bureau, the Hospitality Works initiative from the Nashville Convention & Visitors Corp, job fairs and opportunities promoted by New Orleans & Company, and an innovative workforce lead generation program with five DMOs in the province from Travel Alberta (see right).



Figure 8 See the case study on Travel Alberta's Workforce Lead Generation Program.

When developing these initiatives, ensure efforts reach diverse communities and consider reaching out to marginalized groups such as those looking to rebuild their lives after serving prison time. For example, DV8 Kitchen's [second-chance employment opportunities and employment workshops in Lexington, Kentucky which helps and employs people recovering from substance abuse.](#)



Figure 9 New Orleans & Company invests in both promoting job listings in their industry and running a job fair.

**4. Be an advocate for the tourism and hospitality industry. Work with partners to promote career benefits and opportunities**

Tourism has a public relations problem or an “image liability” in many communities. Work with your partners to highlight opportunities in the sector and what actions you’re taking to make tourism and hospitality a more attractive career option. New Zealand’s Go with Tourism initiative and the visitor bureaus of Orange County’s collaboration on the Orange County Tourism Workforce Initiative provide examples of public–private sector initiatives in action. DMOs should also support organizations such as U.S. Travel Association or Tourism HR Canada on their efforts to improve visa delays for overseas workers.



*Figure 10 In Orange County the DMOs collaborated on a promotion and engagement program (#OCTourismCareers) to promote tourism and hospitality jobs.*

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High quality jobs are driven by high quality tourism

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## 5. Invest in high-value tourism that is operational year-round and resilient

High-quality jobs are driven by high-quality tourism. Invest in destination marketing and management initiatives that support high-quality tourism jobs—with a focus on high-value markets and building year-round tourism. Initiatives should aim to smooth out peaks and troughs in visitation to help create more predictable jobs. Marketing can help but more structural changes are needed to truly address seasonality. This can include product development such as Travel Oregon’s Tourism Experience Studio (see right), plus shifting visitor taxes to outcome-based pricing—varying taxes to incentivize off-season travel.

For example, Croatia has designed its tourism taxes to incentivize travel during different seasons and to different areas of the country. Croatia’s outcome-based pricing model is amongst the most sophisticated in the world with options for 16 taxation rates based on the varying levels of visitor flows across four seasons (Early, High, Low and Late) and four destination types based on their popularity (A, B, C and D). For example, Dubrovnik, among the most popular destinations in Croatia, is classified as a Category A destination. This allows cities and areas in the country to have a targeted tax rate that sends clear signals to the market on when and when not to travel (xvii).

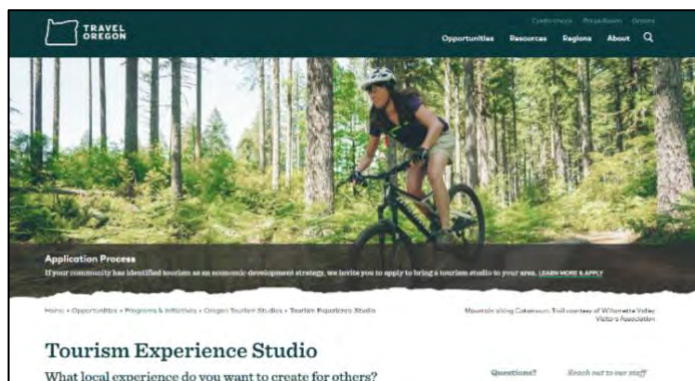


Figure 11 Travel Oregon has worked for more than 15 years in destination management including running a range of [Tourism Studios](#), focused on developed dispersed, year round tourism.

CATEGORY	SEASON			
	Early	High	Low	Late
A	5,50 kn	7,00 kn	4,50 kn	5,50 kn
B	4,50 kn	6,00 kn	3,50 kn	4,50 kn
C	3,50 kn	5,00 kn	2,50 kn	3,50 kn
D	2,40 kn	4,00 kn	2,00 kn	2,40 kn

Figure 12 Croatia has 16 categories of visitor taxes that help address seasonality by sending clear pricing signals on when, and when not, to visit.

## 6. Support competitive wages, working conditions and advancement opportunities

Support and advocate for competitive wages and working conditions, including a living wage and broader benefits. For example, encourage employers to investigate and offer healthcare, work from home options (where feasible) and benefits that celebrate travel. Such benefits could include job swaps with tourism businesses in different locations. Enhancing wages and benefits may mean tourism businesses will need to raise their rates and prices to reflect higher wages and other costs. However, for most destinations, offering timely service with adequate, motivated staff is vastly preferable to the impacts of staff shortages on visitor experiences and word-of-mouth (xviii).

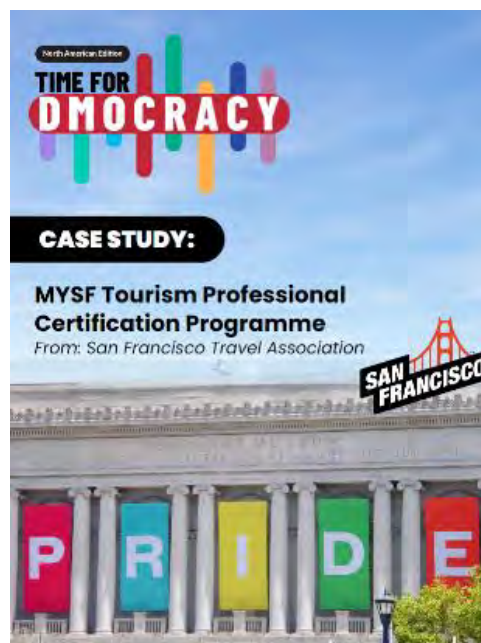


*Figure 13 "Enable decent work and provide competitive employee benefits," was one of four key recommendations on addressing Staff Shortages by the World Travel and Tourism Council (August 2022).*

## 7. Help build high-quality tourism careers

Work with educational institutions to support career development. Initiatives can include continuing education and new skills development (e.g., in technology), scholarship programs, and recognition and rewards for outstanding tourism and hospitality staff. Creating high-quality tourism careers will also require the thoughtful implementation of labor-saving methods and technologies to reduce the need for low-value staff positions. Examples of these methods include giving guests options on how often their room is serviced and providing self-service digital solutions for routine information or check-in (xix).

*Figure 14 The [MYSF Tourism Professional Certification](#) is an example of many similar initiatives from DMOs – a training program to educate tourism and hospitality workers on their destination.*



## **8. Facilitate affordable and accessible housing and childcare for workers**

Workers rely on a place to live and the availability of essential services such as childcare. DMOs and the tourism industry needs to be involved in supporting and facilitating these community services rather than leaving it for other agencies (xx). Support and invest in programs that improve the availability and affordability of housing and childcare in your community for tourism and hospitality workers. Look at examples such as Breckenridge where the Breckenridge Tourism Office, town government and private sector employers, such as [Breckenridge Grand Vacations](#), collaborate to address affordable housing, child care and other benefits that make the town an attractive place to work.

## **9. Strengthen the coordination between public and private organizations to make long-term investments in the workforce**

Engage with industry associations and government agencies that are building a tourism and hospitality workforce. Look at opportunities for both informal and formal collaboration and the identify agencies that can help the process. This could include an industry association in your city, state or province. In Canada, [Tourism HR Canada](#) is a global best practice example of a public-private sector organization focused on workforce and staffing issues. The organization has a [wide range of partnerships and programs](#) that provide good examples of such collaboration.

# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. [Learning Lab 3: Workforce Engagement](#) - featuring Roger Dow (US Travel), Philip Mondor (Tourism HR Canada), Greg DeShields (Tourism Diversity Matters) & Nejc Jus (WTTC)
2. [Staff Shortages](#), World Travel and Tourism Council (WTTC), August 2022
3. Tourism HR Canada's [Research and Resources](#) including their 10-Point Workforce Recovery Plan
4. US Travel Research & Resources [on Workforce](#) including the [State of American Workforce & Its Impact on Travel](#) and [America's Unsung Hero of Job Creation](#)
5. Case Study: [Attracting Workforce Campaigns - Scotland, Ireland, Queensland \(Australia\)](#) and Alberta (see below)
6. [Go with Tourism Career Portal](#), New Zealand Private – Public Program
7. Case Study: [Travel Alberta - Workforce Lead Generation Program](#)
8. Case Study: Los Angeles - Workforce Development Work, Tackling Homelessness
9. Case Study: [San Francisco Travel Association - MYSF Tourism Professional Certification Program](#)
10. Talent Wars – [What People Look for in Jobs & Locations](#), DCI, July 2022



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- xii. [Community Awareness Resident Sentiment Towards Tourism](#), Longwoods International, October 27th, 2022
- xiii. [HR Tourism Canada's Myths & Facts](#) and [Time for DMOcracy survey of North American DMOs](#), Destination Analysts, August 2022
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- xv. [HR Tourism Canada Educator Tools](#)
- xvi. [Disneyland Resort Puts Another \\$1million in Community Workforce Development – Anaheim News, June 2022](#) and [#OCTourismCareers – example from Costa Mesa, CA](#)
- xvii. [The importance of Word of Mouth on destination and travel decisions has been tracked by the State of the American Traveler research by Destination Analysts – sponsored by Miles Partnership](#)
- xviii. More information & detailed references on Croatia's Tourism Taxes: [Tourism Taxation by Design, Group Nao, 2020, Page 31](#)
- xix. [How Hoteliers can Solve Labor Shortages Through Technology, Hospotalitynet, 2021](#) and [Can Technology Help Hospitaslity Labor Shortages, Phocuswire, 2021](#)
- xx. [Colorado Communities Passed Ballot Measures to Shift Tourism Marketing Dollars to Communities](#), Skift Nov 14<sup>th</sup>. 2022

## Other Resources:

[Case Study: Attracting Workforce Campaigns – Scotland, Ireland, Queensland \(Australia\)](#), Miles Partnership, September 2022

[Case Study: Travel Alberta – Workforce Lead Generation](#), Miles Partnership & Travel Alberta, October 2022

[Time for DMOcracy: Workforce Engagement](#) – featuring Roger Dow (US Travel), Philip Mondor (Tourism HR Canada), Greg DeShields (Tourism Diversity Matters), Nejc Jus (WTTC), Miles Partnership, World Travel & Tourism Council, US Travel Association, Tourism Diversity Matters

Time for DMOcracy, [Featured Research: Identifying a Community Capital Investment Portfolio to Sustain a Tourism Workforce](#), Miles Partnership, September 2022

[Time for DMOcracy survey of North American DMOs](#), Destination Analysts, August 2022

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North American Edition

# TIME FOR DMOCRACY

## DIVERSITY, EQUITY & INCLUSION



## Global Best Practices in Community Engagement

Section 4 of 6



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## Acknowledgement and Thanks

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

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



### Knowledge Partners on Diversity, Equity & Inclusion

Thank you to our Knowledge Partners who contributed their insights and expertise to the Diversity, Equity & Inclusion section of the Time for DMOcracy report:



### Program, Agency and Association Partners in Time for DMOcracy (North America)



For a full list of the partners & supporters of Time for DMOcracy see each section of the report, the European edition and TimeforDMOcracy.com

# Introduction

It is the responsibility of Destination Marketing and/or Management Organizations (DMOs) to act as the brand steward for the destination. However, the value of a strategic, inclusive approach to community engagement and diversity, equity and inclusion (DEI) must also be recognized when promoting tourism and supporting local economies. By fostering innovation and bringing together diverse voices and experiences, DMOs can help create a more dynamic, authentic and sustainable destination.



Lead Author: Melissa Cherry, Chief Diversity & Inclusion Officer/SVP at Miles Partnership. In collaboration with the team at Miles Partnership and other partners in the Time for DMOCRACY study.

## At a Glance

- Community engagement is a high priority for DMOs, but most have yet to expand this as part of their destination management practices.
- Most DMOs see a range of challenges in successfully undertaking community engagement with a strong commitment to DEI – reaching all parts of their diverse communities.
- There is always a business case for diversity, equity and inclusion.
- Most North American DMOs do not have any key performance indicators (KPIs) related to community engagement and/or resident sentiment around tourism. This includes KPIs on how broad and inclusive their engagement is with diverse communities.
- Community engagement and DEI practices are evolving to be more meaningful, authentic and necessary to foster unique partnerships and collaborations allowing destination organizations to be mindful and not limited in traditional perspectives and practices.

### WHAT TO KNOW

## WHAT TO DO

Time for DMOcracy identifies 9 practical recommendations for how DMOs can contribute to a successful DEI strategy:

1. Make the commitment to DEI and Community Engagement
2. Embrace the intersection of destination stewardship, sustainability and DEI
3. Create a culture of inclusion in the workplace and local industry community
4. Be deliberate about workforce development with a focus on DEI
5. Implement deliberate communications and transparency around your community engagement and DEI efforts
6. Engage and support diverse local businesses and community creators
7. Review and refine your community engagement strategy to incorporate DEI
8. Evolve your marketing to develop imagery and content that is welcoming & inclusive to all
9. Develop success metrics to celebrate progress and growth

## RESOURCES

We highlight and share a range of critical research, case study examples and other resources to inform your action. See Page 18.

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

The below insights have been extracted from the survey of North American DMOs as part of the Time for DMOcracy project (i). The full report is noted in the 'Resources to Use' section or can be found [here](#).

### a. DMOs See Community Engagement and DEI as High Priorities

Many North American and European DMOs consider both community engagement and diversity, equity and inclusion to be a top priority for their organization. Most predict that this importance will continue to increase in the future. 77% of DMOs rank Community Engagement overall as a high or very high priority (ii) and an even higher % - 87% agree or strongly agree with the statement that "Our organization is committed to diversity and inclusion" (iii).



While around half of all DMOs engage in some destination management activities, only a small number actively address significant community issues such as workforce development, sustainability and short-term rental management (iv). DMOs are likewise committed to DEI but somewhat ambivalent and uncertain on the principles and practices on how to achieve it (v).

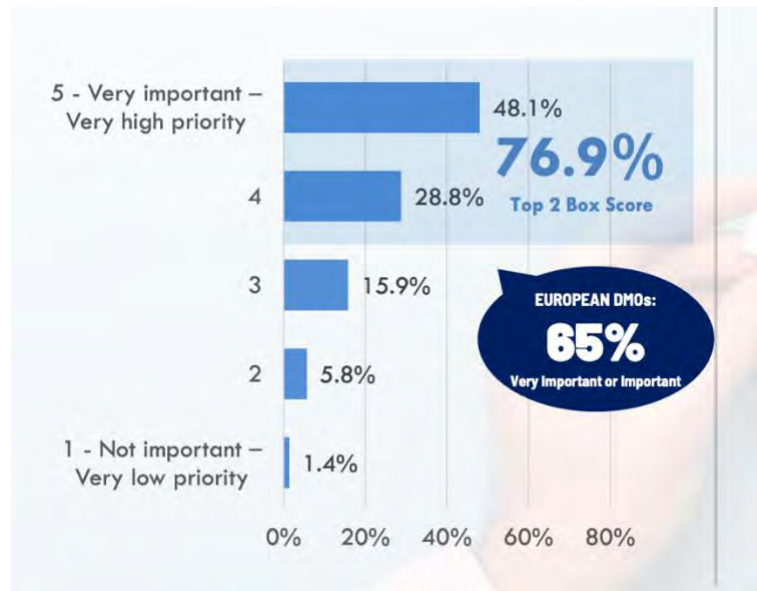



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Respondents to the [2022 EDI Study](#) on Destination Organizations believe that their destination organizations are committed to DEI, but still show ambivalence to the organization actively embodying principles of DEI.

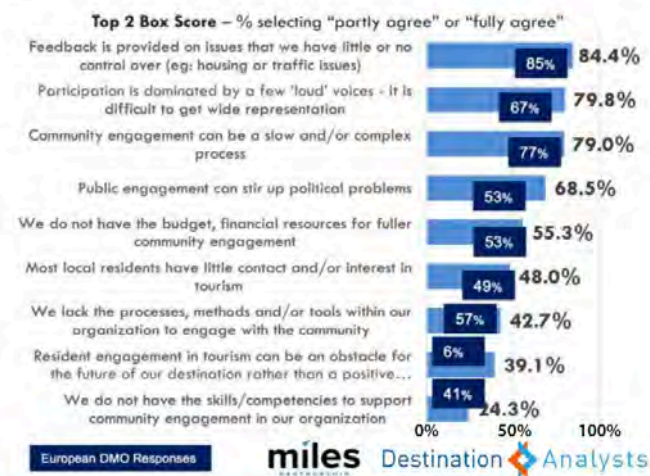
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**Figure 1:** A significant majority (77%) of responding North American DMOs rated community engagement as a very high or high priority “in their organization today.” This was higher than European DMOs, where 65% rated it at the same level of importance. This reinforced feedback received through the survey and the Time for DMOcracy global study—that DMOs are looking to expand their commitment to, and investment in, destination management functions focused on community engagement.



## b. DMO challenges with Community Engagement

### ORGANIZATION'S CHALLENGES WITH RESIDENT & COMMUNITY ENGAGEMENT



DMOs identified a range of challenges with community engagement. A minority of DMOs remain skeptical, while most have concerns. This includes concerns in how to facilitate feedback from diverse and representative community voices. The research emphasized the importance of tackling community engagement with the right resources, skills, and partnerships to engage effectively and foster real and productive collaboration.

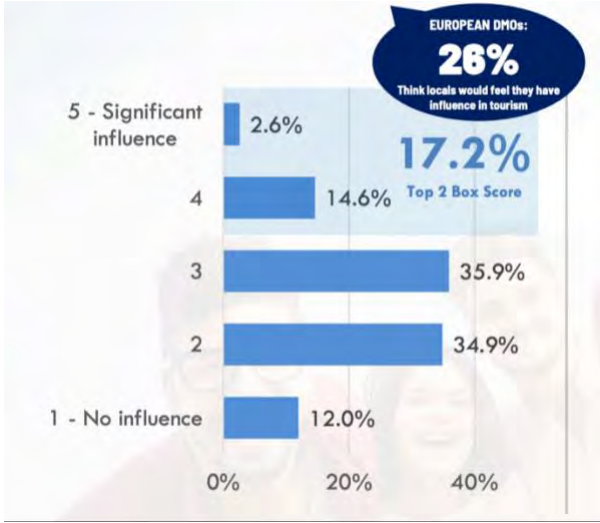
**Figure 2:** Most North American and European DMOs agreed with at least some of the potential challenges; most notably the lack of DMO control over many of the concerns raised by residents, the slowness and complexity of community consultation and the difficulty of ensuring that a few do not dominate the discussion. Additionally, North American DMOs were more skeptical than their European peers of the value of community engagement with almost 4 of 10 (39%) at least partly agreeing that it “can be an obstacle to the future of our destination”—vs. just 6% of European DMOs.





**c. Gap in Community Empowerment**

Research data highlighted a troubling gap in the importance of the community and how much influence residents feel they have in tourism in their community.



**Figure 3:** Only a small minority of North American DMOs (17%) reported that their residents would feel “they have any influence when it comes to the development and management of tourism” in their community. This was below the 26% of European DMOs who reported this degree of community empowerment. Diverse communities, who have traditionally been less involved in community planning & development, are likely to feel even less influence.

#### d. A Need to Develop a Culture of Inclusion

Only around one quarter of North American DMOs reported special efforts in ensuring DEI throughout their community engagement efforts. This included specific steps to ensure broad representation in their research respondents, investing in special, diverse advisory groups or that they have a diverse staff, representative of their community. European DMOs tend to be at an earlier stage in their DEI efforts.

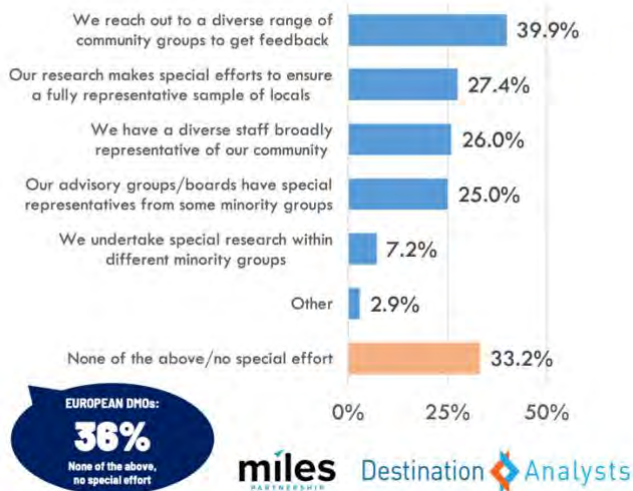


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Respondents to the [2022 EDI Study](#) on Destination Organizations are either unaware of or do not have any organization policies in place relating to diverse vendor procurement, decision-making and organizational culture.

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**ENSURING A FULLY REPRESENTATIVE VIEW OF ALL RESIDENTS**



**Figure 4:** The survey highlighted that most DMOs need to do more to ensure all community groups feel included in their community engagement efforts.

**e. The Business Case for Diversity**

McKinsey & Company researched the financial impact of diversity of companies across industries. Their May 2020 report, **“Diversity Wins”**, reviewed 1,000+ companies in 15 countries globally. They found that companies in the top quartile for racial and ethnic diversity are 36% more likely to have financial returns above their respective national industry medians and 25% more likely to have financial returns above their respective national industry medians for gender diversity. Their report also revealed that companies in the bottom quartile for both gender and ethnic and cultural diversity are 29% less likely to achieve above-average profitability than other companies in their data set.



**Figure 5:** McKinsey & Company, May 2020 report, *Diversity Wins*

When it comes to diverse hiring practices, DMOs have considerable progress to make. Only 26% of DMOs in the Time for DMOCRACY survey indicated they “have a diverse staff broadly representative of their community”. Progress in addressing this may be uneven as a significant minority of respondents to the [2022 EDI Study](#) on Destination Organizations were uncertain or ambivalent in their perception of how their organization is doing in the hiring of a diverse workforce and being inclusive.

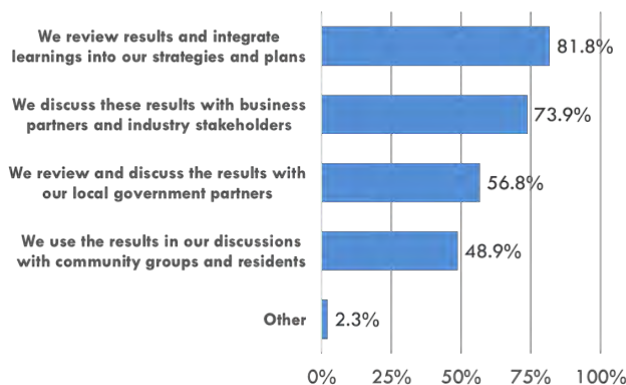


Diverse teams are also better equipped to target and serve diverse customer markets, such as women, ethnic minority and LGBTQ+ communities who currently represent an increasing share of consumer purchase power that is often overlooked or not leveraged by many organizations. A report by McKinsey & Company found that a diverse workforce, including diversity in gender, racial ethnicity, and experiences, can bring a competitive advantage to organizations that are able to attract and retain diverse talent.

## a. The Importance of Transparency & Reporting

The Time for DMOcracy survey of DMOs also highlighted that not all North American DMOs are sharing key results of their resident sentiment research widely – including with local government and/or community groups. The research also demonstrated that only 17% of North American DMOs have any key performance indicators (KPIs) that specifically relate to community engagement and/or resident sentiment around tourism. Transparency in reporting around community engagement and DEI is important to build trust with all the diverse members of your community – as are having KPIs related not only to community engagement more broadly but specifically to DEI objectives.

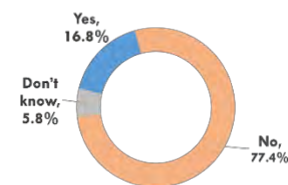
### USING THE RESULTS OF RESIDENT SENTIMENT RESEARCH



**Figure 7:** While most North American DMOs share the results of resident sentiment research with business partners only around half share with local government and/or community partners.

**Figure 8:** Over three quarters (77%) of U.S and Canadian DMOs noted that they do not have KPIs related to community engagement. Small to medium sized CVBs (9 staff or fewer) were most likely to not have any community related KPIs (88%) with larger CVBs the most likely to have KPIs (still however, just 31%).

### USE OF KPI'S FOR RESIDENT SENTIMENT & COMMUNITY ENGAGEMENT



### COMMUNITY ADVISORY BOARD

**Figure 9:** DEI should be integrated through ever other part of community engagement – including investments in community participation. A separate section of the Time for DMOcracy North American report covers Community Participation Models including efforts by DMOs such as Community Advisory Boards. For example, the Los Angeles Tourism & Convention Board has set up a Community Advisory Board which includes specific representation from 6 traditionally underrepresented communities including Muslim, African American, Hispanic American, Native American, LGBT+ and disability communities. See 'Community Participation Models' section of the [Time for DMOcracy reports](#).

# What To Do

## 9 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Make the commitment to DEI and Community Engagement
2. Embrace the intersection of destination stewardship, sustainability and DEI
3. Create a culture of inclusion in the workplace and local industry community
4. Be deliberate about workforce development with a focus on DEI
5. Implement deliberate communications and transparency around your community engagement and DEI efforts
6. Engage and support diverse local businesses and community creators
7. Review and refine your community engagement strategy to incorporate DEI
8. Evolve your marketing to develop imagery and content that is welcoming & inclusive to all
9. Develop success metrics to celebrate progress and growth

### **1. Make the Commitment to DEI and Community Engagement**

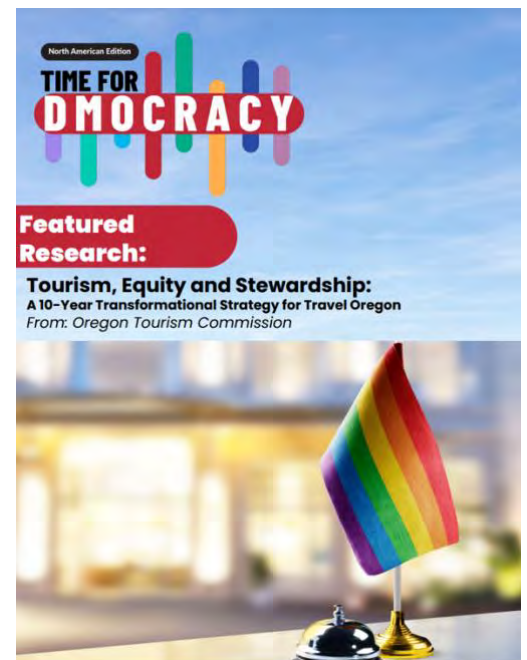
As a first step, DMOs must ask themselves, when it comes to DEI and community engagement, what are they committed to make happen and within what timeline. DMOs must move from being reactive and checking boxers to being proactive. The organization plan should include a strong vision for the role that community engagement and DEI will play in your destination organization as a whole. This includes its implications for various departments and teams – plus clients and external stakeholders. The organization should also be able to articulate why DEI is a priority, from both a business and work culture perspective, and how it will manifest in policies and measurable outcomes. At the end of the day, DMOs will need to ensure that DEI is aligned and prioritized with overall business objectives, therefore making community engagement an actionable commitment.



**Figure 10:** Travel Alberta’s partnership with Indigenous Tourism Alberta (ITA) demonstrates a long-term commitment to reconciliation and genuine partnership with Indigenous tourism businesses.

## 2. Embrace the Intersection of Destination Stewardship, Sustainability and DEI

When considering community engagement for destinations, it is critical to understand the intersection of destination stewardship, sustainability and DEI. Together, these three pillars embody what it means to be inclusive. Destinations need to build a community engagement process that is diverse and inclusive in terms of stakeholder engagement and equitable in terms of building sustainable tourism models that are accessible. To effectively practice destination stewardship, we must prioritize diversity, equity and inclusion in all aspects of our approach and process. This means actively seeking out and engaging a diverse range of stakeholders in order to create a sustainable tourism model that benefits both the social and economic well-being of the community. Through this approach, DMOs can create a space where voices can contribute to the larger idea that is ultimately strategic, leading to advocacy, governance and policy to implement meaningful change.



**Figure 11:** The draft 10-year transformational strategy for Travel Oregon focuses on addressing the needs of all residents and address destination stewardship, sustainability and DEI.

### 3. Create a Culture of Inclusion in the Workplace and Local Industry Community

There is a vast amount of value generated by increasing diversity and centering equity and inclusion in your organization’s community engagement efforts. This includes cultivating a workplace and local industry community where everyone feels welcome and where all people feel confident and equipped to share their ideas and experiences. To align your workplace culture with your vision, purpose and core values, it is important to regularly assess the beliefs, attitudes, expectations and experiences of your employees. Use the insights gained from this evaluation to inform future decisions and identify any necessary changes that will enhance the overall strength of your organization, while also considering the impact on your DMO’s relationship with the local community.

### 4. Be Deliberate about DEI in Workforce Development

Taking into account the impact Covid-19 has had on the workplace, it is essential to develop long-term solutions that contribute to a stronger, more resilient workforce in the future. Today, we must intentionally integrate DEI practices within our talent acquisition and retention efforts.

To ensure that talent is developed equitably, DMOs must prioritize diversity, equity and inclusion in all aspects of our talent development efforts. This includes understanding the role that DEI values play in employee performance and accountability. Additionally, DMOs must take proactive steps to create talent pipelines and showcase our industry as a desirable career path through various community engagement initiatives.



**Figure 12:** Through Tourism Diversity Matters’ Apprenticeship Program, candidates will gain exposure to local stakeholders and community partners such as airports, government agencies, meeting and event organizations, restaurants and attractions. Upon successful completion of the program, a full-time position will be secured. (Link to play video [here](#))

For more information visit the Workforce section of the Time for DMOcracy report toolkit.



## 5. Implement deliberate Communications and Transparency

To successfully engage the community and demonstrate progress on diversity, equity and inclusion, we must be intentional with information-sharing. It is important to build and implement an internal/external communications strategy to articulate “the why.”

For example, what are the facts and/or data that support why community stakeholders need to support a DMO’s goals and objectives? And what are your outward-facing communications related to why DEI and community engagement are both priorities at your destination organization?

Communication can make or break any community engagement effort. Take time to think strategically about your internal and external communications. Understand what you want to communicate and then develop a clear message. Decide who should carry that message instead of the CEO—consider a community leader, elected official, business leader, or someone completely unexpected. And finally, work internally to develop feedback loops, breaking down silos, and creating safe places for ideas to grow and thrive.

## 6. Engage and Support Diverse Local Businesses and Community Creators

Supplier Diversity is not a new topic, but many destination organizations do not have a plan in place. This may seem like a heavy lift for many DMOs, but an organization can start by asking the following questions:

- How can we build an external network of vendors that is diverse and inclusive?
- How can we operationalize our process to move away from unconscious bias and broaden our sourcing for talent?
- Beyond staffing, in what other areas of contracted services can DEI considerations have impact?

These few considerations can help create an environment where a DMO can source services and talent in a much more competitive and efficient environment that can ultimately lead to effective community engagement and more innovative business solutions.



**Figure 13:** Greater Miami CVB’s multicultural and tourism development mission is to ensure that the diversity of Miami’s multicultural communities, attractions and events are promoted by working locally to build consistency and economic sustainability, broadening the scope of initiatives and maximizing marketing opportunities.

## 7. Review and Refine your Community Engagement Strategy to Incorporate DEI

It is the responsibility of the local tourism and hospitality community to foster deep connections with the diverse communities that make up their destination. By actively supporting broader cultural and institutional change and demonstrating how the hospitality industry can enhance the lives of residents, diversity, equity and inclusion initiatives can effectively be advanced. Focus on building relationships across your community by listening and committing the time and effort to follow up and conduct genuine, ongoing outreach. Partner with other agencies and organizations (government entities, NGOs, community and business groups) that are also prioritizing DEI. Think about unique partnerships and collaborations that will allow your DMO to be open-minded and not complacent. To ensure that all perspectives are considered, strive to provide open access to diverse viewpoints and engage with community stakeholders to bring in a range of expertise and insight. To get started in this space, ask the below questions:

- Who are your current stakeholders and who is missing?
- What do current community engagement efforts look like and how can they be stronger?



**Figure 14:** ICMA has published a resource on “How to Facilitate Inclusive Community Outreach and Engagement.”

## 8. Evolve Your Marketing to Develop Imagery and Content that is Welcoming & Inclusive to All

As an industry, we need to collectively strive to implement inclusive and equitable marketing practices that are essential to tourism marketing and destination brand stewardship. Diverse and inclusive marketing aims to speak to a larger audience of potential consumers by looking past preconceived notions of gender, age, race, income, sexuality, language and religion (among other things). An inclusive campaign should feature people from the targeted audience groups and incorporate diverse stories and perspectives. By focusing on shared experiences such as enjoying time with family or traveling, and featuring individuals from a variety of backgrounds, messaging that resonates with all audiences can be created. It is important to continually strive to evolve promotional practices to be welcoming and inclusive.

Additionally, messaging should consider and align destination experiences with culturally relevant experiences, products and programs/events, and should make target audiences feel welcome, visible AND understood. Consider marketing activations and delivery channels that resonate with target audiences. For example, delivery channels through community engagement efforts or trusted community partnerships will resonate stronger than traditional media channels.

Finally, storytelling is a powerful tool that should be leveraged beyond traditional practices. Push for inclusive marketing practices that prioritize community partnerships, contributions and authentic experiences. Do not look to implement one-off opportunities that, in the end, only serve one side of a partnership. Think long term, think scale and think sustainability.

**Figure 15:** San Francisco Travel Association created an advisory council to address the need to become a more inclusive and diverse organization to better represent and promote the communities of San Francisco.



## 9. Develop success metrics to celebrate progress and growth

Thinking back to how the challenge is simply getting started, it is important to celebrate the small, early wins. It is also important to have clear and measurable outcomes. Invest in quantitative and qualitative resident and business research that reaches the full diversity of your community. Ensure you can segment sentiment by neighborhood, age, ethnicity and other important groupings.

# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. North American and European DMOs on Community Engagement, August 2022, Miles Partnership and Destination Analysts – [view & download here](#) Time for DMOCRACY Survey of 292 North American and European DMOs, August 2022  
<https://northamerica.timefordmocracy.com/>
2. Destinations International Equity Diversity & Inclusion (EDI) Study on Destination Organizations 2022 – [view & download here](#)
3. McKinsey & Company, May 2020 report, Diversity Wins – [view and download here](#)
4. Case Study: [Travel Alberta – Indigenous Tourism Engagement](#)
5. [Learning Lab 4: DEI Engagement](#) – featuring Jen Gray-O'Connor, Roz Stuttley and Renee Areng
6. [Greater Miami CVB Multi-cultural Business Program](#) – case study, presentation and slide deck from July 2022 Learning Lab
7. [Tourism, Equity and Stewardship: A 10-Year Transformational Strategy for Travel Oregon](#)
8. 2021 [Equity, Diversity & Inclusion Strategy Roadmap](#)
9. Tourism Diversity Matters Apprenticeship Program – Tourism Diversity Matters – [view here](#).

## References & Sources:

- i. Summary Report of Survey of North American and European DMOs on Community Engagement, August 2022, Miles Partnership and Destination Analysts.
- ii. Summary Report of Survey of North American and European DMOs on Community Engagement, August 2022, Miles Partnership and Destination Analysts
- iii. Destinations International Equity Diversity & Inclusion (EDI) Study on Destination Organizations 2022
- iv. Summary Report of Survey of North American and European DMOs on Community Engagement, August 2022, Miles Partnership and Destination Analysts
- v. Destinations International Equity Diversity & Inclusion (EDI) Study on Destination Organizations 2022

## Other Resources:

[Inclusion & Diversity Guidelines](#), World Travel & Tourism Council, December 2020

[How to Facilitate Inclusive Community Outreach and Engagement](#), ICMA

[Towards Inclusive Tourism?](#) Stakeholder Collaboration in the Development of Accessible Tourism, Tourism Geographies, 2018

[Factors Influencing Indigenous Engagement in Tourism Development](#): An International Perspective, Journal of Sustainable Tourism, 2016

[Travel Industry Association DEI Pledge](#), Travel Unity

[DEI Standards for Travel & Tourism](#), Travel Unity

[Inclusive and Accessible Travel Guidelines](#), World Travel and Tourism Council

[Indigenous Communities Engaging in Tourism Development in Arizona](#), USA, Ambros & Buzinde, Journal of Heritage Tourism, 2022

[Organizational Change Towards LGBTQ+ Inclusion in Hospitality and Tourism: Managerial Perspectives](#), Vongvisitsin & Wong, Tourism Management, 2021

[Fundamentals of Creating Inclusive Content](#), Miles Partnership

[Inclusive Tourism Development](#), Scheyvens & Biddulph, Tourism Geographies, 2018



# Global Best Practices in Community Engagement

Section 5 of 6



[northamerica.timefordmocracy.com](http://northamerica.timefordmocracy.com)

## Acknowledgement and Thanks

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

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

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



### Knowledge Partners on Media & Communications

Thank you to our Knowledge Partners who contributed their insights and expertise to the Media & Communications section of the Time for DMOcracy report:

**Ketchum**

**357 Communications LLC**

**SPARKLOFT**

### Program, Agency and Association Partners in Time for DMOcracy (North America)



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# Introduction

A successful visitor industry relies upon support and understanding from the community on the role of tourism in their destination. Not only supporting, but understanding tourism is vital to a thoughtful and considered discussion on the future of tourism in a community. It is also essential to ensure there is a warm welcome to visitors and sustainable resources (e.g. funding) for DMOs and the tourism sector to effectively market and manage tourism.

Lead Author: Dr. Ashley Schroeder, School of Hospitality and Tourism Management, University of South Carolina. In



collaboration with Miles Partnership and other partners in the Time for DMOcracy study.

## At a Glance

- While a majority of DMOs report engaging in media and communication efforts with local residents they are typically engaging with locals in limited ways
- The Time for DMOcracy global study has reinforced the importance communication strategies with local residents. DMOs should have a media and communication plan for engaging with their local market including residents, businesses, government and other key stakeholders.
- Some obvious areas of communication are to extend responsible travel and stewardship messages to the local community and connecting with residents to encourage better quality VFR travel.
- Monitoring trends in both traditional and social media helps identify opportunities and challenges, including emerging 'hot button' issues around tourism.
- Online and specialist community participation platforms are largely underutilized to engage with locals. Only two in five (40%) North American DMOs report using online platforms within the past 1-2 years to engage with locals.

### WHAT TO KNOW



## WHAT TO DO

We identified 8 steps for an effective media and communications strategy that engages effectively with your local community:

1. Expand your Media & Communications Programs to include your Local Community
2. Have an Up-To-Date Communications Plan
3. Continually Monitor Traditional & social media
4. Build Strong Relationships with Key Opinion Leaders & Advocates for Tourism
5. Simple, Consistent Messaging - Practice the 3-5-7 Rule
6. Embrace the Power of Positive Messaging
7. Compliment Facts with Relatable Stories from Locals
8. Add Online Solutions to your Communication Strategies

## RESOURCES

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

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### **a. DMOs are typically engaging with locals in limited ways in their media and communications programs**

The Time for DMOcracy global study has reinforced the importance for DMOs of investing in their local market (i). However, their media and communications efforts have traditionally been an extension of promoting the destination to visitors; focused primarily on reaching visitors, generating incremental spending and room tax (i.e., non-residents).

The DMO survey which was conducted as part of the Time for DMOcracy study highlighted that while most DMOs report engaging with their local residents via media and communications (69%) it is often in limited ways; press releases that included local media or sharing event or visitor related content for locals to use themselves or when hosting Visiting Friends and Relatives.

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69% of DMOs report communication and media efforts with local residents but typically in limited areas

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As part of the Time for DMOcracy study we worked with the [College of Information & Communications](#) at the University of South Carolina to analyze the nature of traditional and social media coverage and conversations on tourism on the destinations of the Time for DMOcracy DMO Partners. This highlighted a range of positive and constructive messaging on tourism that

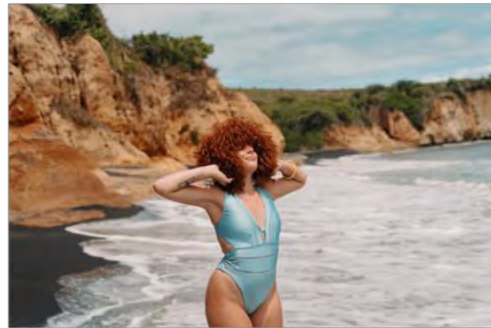
we outline below.

## b. Working with the Community to Develop Creative, Campaigns and Content

An increasing number of DMOs are including the community in the creative development of marketing programs. This helps ensure the messaging is authentic to the destination and its community.

[Discover Puerto Rico's Live Boricua](#)

campaign (ii) is a prime example of how locals can be included from the onset.



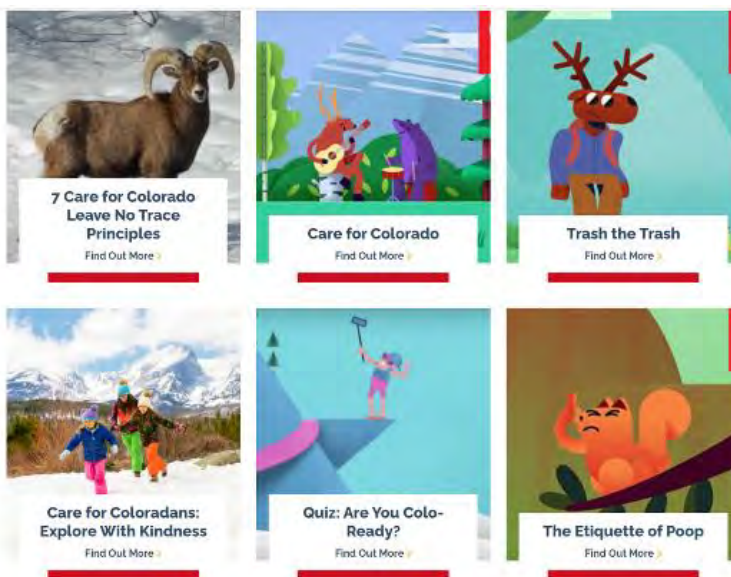
This started with a local focus group that rated their favorite Live Boricua moments so that Discover Puerto Rico could share them through the lens of the locals. In total, 300 Puerto Ricans shared their input and ultimately defined Live Boricua for the DMO. This emphasis on including locals carried through every element of the campaign, including the soundtrack, still photography, production crew, costumes, etc. The media kick-off included crafted stories and shared recommended itineraries by Boricuas to show travelers why and how to Live Boricua, and specialized mailers with locally sourced products were sent to Diaspora influencers and media. While the Live Boricua campaign has been successful based on traditional metrics such as impressions and influencing visitation, it is important to highlight another relevant metric - reactions to the campaign among residents and Diaspora audiences has been overwhelmingly positive, with 85% indicating that they are proud to share the Puerto Rican culture and lifestyle with visitors.

## c. Reaching the Community with Stewardship & Responsible User Messaging

An increasing number of destinations are investing in messaging around responsible travel, and this now includes destinations that are including locals in this communication.

Given the importance of locals to VFR travel and those who have recently moved to a destination, this outreach is important to maximize the influence of such communications.

**Care for Colorado** – an educational program undertaken with the environmental group, Leave No Trace, has added content specifically aimed at local Coloradans and those who those hosting out of State visitors. The program has invested in developing content including songs and video that are fun and engaging to consumer or share – for both locals and visitors.



**Mammoth Lakes** involved the local community throughout the development of their [responsible visitor messaging](#) (iii). While developing the stewardship messaging campaign, the DMO sought feedback from the local community which identified some questions and concerns – specifically over the selection of a particular song. The song was changed, a potential PR issue avoided, and the communication program was launched with the confidence and support of the community. This lesson emphasizes that importance of community feedback as an important check in informing all destination messaging and campaigns.

## d. Communications around the Development & Management of Tourism

Time for DMOcracy has highlighted that most American and Canadian Residents feel they are not consulted or involved in important decisions on the development or management of tourism in their community. What impact of tourism need to be better studied, managed or mitigated? what improvements in infrastructure are needed? While many Destinations seek some input from their local residents on the future of tourism when developing or updating their Destination Master Plan or Sustainable Tourism Strategy, this is not enough. Communications on the options and alternatives around the development of tourism should be ongoing – and integrated with other parts of community engagement including a Community Participation Model (eg: a Residents Advisory Panel) and Resident Sentiment Research.

**B Like Breckenridge** – is a communications program developed with an understanding that managing tourism responsibility in a destination needs to involve both the locals and visitors in partnership. Its messaging – along with other areas of community engagement such as resident sentiment research are an integral part of the [Destination Management plan](#) for Breckenridge.



An increasing number of destinations have this type of ongoing communication program related to destination management including [Park City, Utah](#), [Montreal, Quebec](#) and [Anaheim, California](#) (the later part of a wider city led initiative to seek local neighborhood feedback on a range of issues and budget decisions including tourism).

## e. Opportunities with Visiting Friends & Relatives

Over 40% of leisure travel in the U.S involves at least a component of visiting friends and relatives (iv). Hence local residents are influential in the motivation to travel and in their friends and family's length of stay and in the nature of the experiences they undertake. Despite this very few DMOs have any type of dedicated VFR marketing and content program designed to inform and motivate higher quality VFR travel. Feedback from DMOs point to the perception that VFR travel is lower quality because it may not include a hotel stay. However, research has shown that over one third of VFR visitors (v) are not staying with friends and family – but instead at hotels or short-term rentals.



*Figure 1 Some destination visitor guides invite locals to order them for their visiting friends and family but very few DMOs have invested in content or communications to stimulate the VFR market*

This suggests a significant benefit of including local residents in marketing and communications to influence on VFR travel – as well as boosting local resident’s own knowledge and pride in their destination.

## **f. Monitoring Trends in Media and Social Media**

Monitoring trends in media and social media helps identify opportunities and challenges, including emerging ‘hot button’ issues. DMOs should be aware of what is being said about tourism in their destination across both traditional and social media.

This should be a process of both informal engagement with media and more formalized monitoring and management. Develop a routine for you and/or selected staff to review important local media but also invest time in meeting regularly with local journalists and ‘influencers’ – to brief them on your work and to better understand their focus.

More formalized monitoring of media is also important through both traditional and social media sentiment analysis tools. Use tools that aggregate a good cross section of important sources and identify opportunities and challenges by focusing on the trend line and outliers across tourism related topics.

Comparing trends associated with your destination with your peer destinations can also help you understand how you stack up to your competition from the lens of the media and social media (e.g., Is online sentiment towards your destination more positive or negative than your peers? Does the media mention your destination more frequently?).



Monitoring conversations about your destination in the media and social media can help you understand if a community challenge, such as homelessness, is a tourism challenge from the lens of the media and social media (vi). Monitoring stories and fluctuations in sentiment analysis helps the DMO to quickly identify an emerging issue and develop a communication response early.

Figure 2 – Social Media Listening Platform [Zavy](#) monitors conversations, competitor analysis and platform performance

Our review of sentiment analysis of media identified a range of challenges for DMOs (vii) The available tools have limitations in analyzing the context, meaning and importance of content and conversations around tourism. The sentiment analysis tools are only as good as the algorithm. For example, algorithms cannot detect sarcasm and often do not analyze emojis, social media posts. This means media content can be miscategorized in terms of the sentiment it is expressing. Another challenge is that even when the sentiment is analyzed correctly, the data may not be relevant or result in actionable insights for your organization (viii). Although it is unlikely that *all* noise can be reduced, substantial consideration should be given to the search parameters used to monitor media and social media conversations about your destination to reduce the noise.

This includes search terms, excluded words (this is especially important if there are multiple destinations with the same name), finding words that are near each other (e.g., tourism and your destination name must be within X words of each other), and so on.

**Online and specialist community participation platforms are largely underutilized to engage with locals. Only two in five (40%) North American DMOs report using online platforms within the past 1-2 years to engage with locals.**

Differences were found based on the type of DMO, with rural/county DMOs (49%) and small-medium CVBs (48%) being more likely than large CVBs (32%) and state and provincial tourism organizations (18%) to use these platforms to engage with locals. Even fewer DMOs report using specialist community participation platforms such as Granicus or CityLab. These results reveal an opportunity for DMOs to leverage online platforms to engage with locals, which could help them overcome a major challenge to resident and community engagement – participation is dominated by a few ‘loud’ voices – it is difficult to get wide representation (79.8%) (ix).





# What To Do

## 8 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Expand your Media & Communications Programs to include your Local Community
2. Have an Up-To-Date Communications Plan
3. Continually Monitor Traditional & social media
4. Build Strong Relationships with Key Opinion Leaders & Advocates for Tourism
5. Simple, Consistent Messaging - Practice the 3-5-7 Rule
6. Embrace the Power of Positive Messaging
7. Compliment Facts with Relatable Stories from Locals
8. Add Online Solutions to your Communication Strategies

### 1. Expand your Media & Communications Programs to Include Local Community

The bulk of DMO's current media and communications efforts are focused only on visitors. This needs to change. Ensure your communications plan, strategy, and resources includes reaching your key local stakeholders as well as the wider community (x). Some simple steps include involving locals in a content creation program, like Discover Puerto Rico did with their [Live Boricua Campaign](#) (xi) or engaging with the community on stewardship messages and to encourage more positive VFR travel. Equally important is updating, educating and seeking feedback from local residents on important decisions on the development and management of tourism in your destination – as illustrated by [Breckenridge's Destination Management Plan](#) and their ongoing engagement with local via their [B Like Breckenridge](#) program.



## **2. Have an Up-to-Date Communications Plan**

Communications plans need to be kept up to date. At a minimum, you should update them on an annual basis. Refine and update the plan whenever critical information (e.g., contact details) changes. Lessons learned and best practices should be integrated into this plan along with clear objectives and how to measure results. Your communication strategy should include a crisis communication plan – how to manage a challenging event or story. Time is of the essence during crises. You will be better prepared to respond to a crisis efficiently and effectively if you have an up-to-date communications plan. (xii)

## **3. Continually Monitor Traditional & Social Media**

You should monitor trends in the topics being explored by and the sentiment of media, as well as trends in the sentiment, issues, and opportunities surfacing on social media on an ongoing basis (xiii). There are many ways to do so, ranging from signing up for Google Alerts to having a dedicated staff member whose responsibilities include monitoring media and social media. Search parameters are key to reducing “noise.” The relevant information gathered from monitoring these platforms should help inform additional research needs and be integrated into your community engagement programs or media and communications efforts.

### **Recommended Actions**

**Based on Results for 22 North American Destination Partners**

1. Build a system of monitoring what is being said about your destination in the prestige media and social media
2. Build stronger relationships with key stakeholders – such as media, politicians, and non-paid influencers – to build awareness and support for tourism in your destination
3. Develop a “program” for content creation in both media and social media that revolves around destination awareness and support
  - a) Consider influencers as a way of building awareness and support, particularly in smaller destinations



#### 4. Build Strong Relationships with Key Opinion Leaders & Advocate for Tourism

Develop a diverse coalition of partners; informed, ready and available to engage on the importance of travel and tourism to your community. These allies and advocates should include a diverse range of stakeholders including politicians, media, online influencers, key industry leaders and community leaders, to build awareness and support for tourism (xiv). Work consistently to expand the breadth of your network of tourism advocates – in order to expand the reach of your message.

This includes engaging with allies in diverse communities who traditionally have not been part of the conversation around tourism in many communities. Especially in difficult times of a tourism related issue or crisis, it is about ensuring that the right person is telling the right story to the right audience. You may not always be the right person for an audience. Instead, you should have advocates who are ready to be engaged to reach their unique audiences (xv).



#### 5. Simple, Consistent Messaging – Practice the 3-5-7 Rule

Although most DMOs and their communities have a complicated truth, you must get to the simple truths. In our Learning Lab, Anne Madison of the Cruise Line Industry Association (CLIA) emphasized a 3-5-7 Rule to plan your communications. The starting point is that 3 is the “magic number.” Base your message in 3 strong, powerful, positive messages, that is easier for you to remember, for others to remember, and for others to share. Work hard to distil the issues around tourism into a few simple messages. It is a reality in public relations that:

“The public will believe a simple lie over a complex truth.”

Alexis de Tocqueville

The 3-5-7 Rule focuses on the way people receive messaging until it becomes credible, and they do something about it. It takes: 3 times, 3 different ways before someone hears you; 5 times, 5 different ways before they believe you; and, 7 times, 7 different ways before they do something about it (xvi). Integrate these concepts into your media and communication with simple, consistent messaging.

## 6. Embrace the Power of Positive Messaging

Negative messages tend to be more memorable than positive ones. Oftentimes, if you repeat the negative, you are reinforcing it. Embrace the power of positive messaging by emphasizing the benefits, value and potential of tourism when discussing it in your community (xvii). Each year, Destinations International releases the Tourism Lexicon (xviii) for the US, Canada and a few other nations, to help DMOs communicate their work and value in simple, effective language that resonates with tourism stakeholders. We have summarized the latest Lexicon in the [research summary here](#) or [see the 2020 edition here](#). This resource can be used to integrate more positive messaging into your story of tourism that resonates with your audiences.

## 7. Compliment Facts with Relatable Stories from Locals

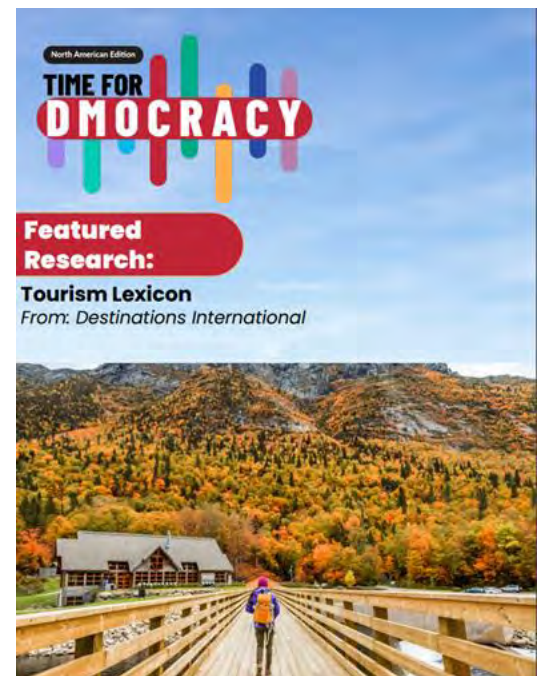
Many programs that DMOs invest money in not only help tourism, but also enhance the overall quality of life for the local community. For example, if your destination is developing a mountain bike trail look for local stories that illustrate the potential, positive impact of the project.

*“Tell me a fact, I’ll learn.*

*Tell me the truth, and I’ll believe*

*But tell me a story, and it will live in my heart forever.”*

Steve Sabol, Filmmaker and Co-founder of NFL Films

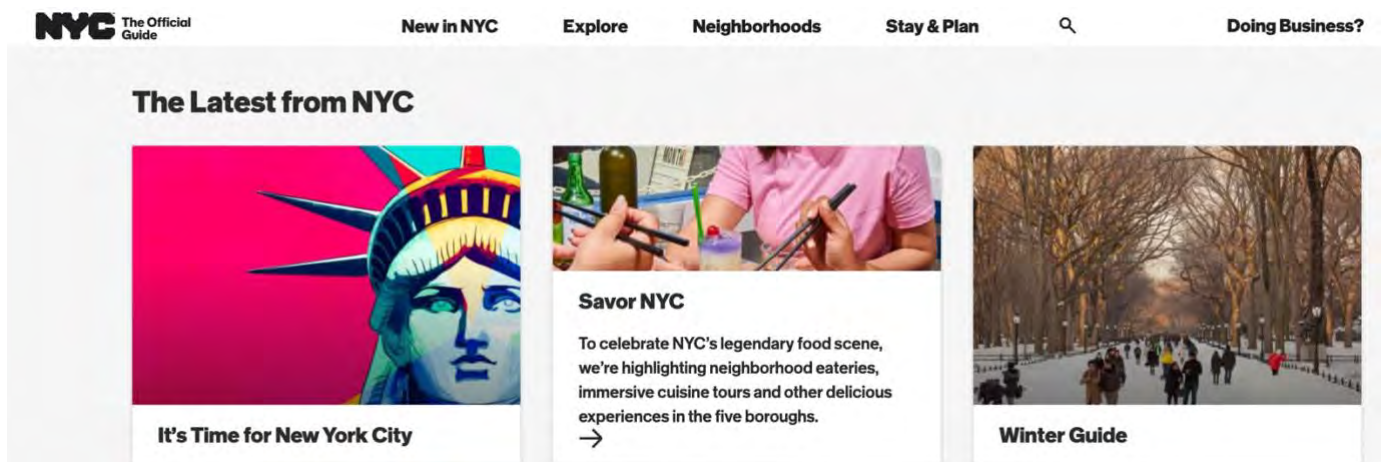


Present the facts of the tourism, recreational and economic benefits of the investment but support these facts with positive, real-world stories of how both visitors and locals will benefit. Look for stories that illustrate how a project will make a personal and positive difference to their experience of your destination or their lives in the community (xix).

## 8. Add online Solutions to you Communication Strategies

Add online solutions into your communications program. Start by simple enhancements to your destination website to include information focused for residents including What to Do (events focused on locals, places that welcome friends and family groups) and What to Know – for example, information on tourism and hospitality jobs and how tourism is being planned and managed in your destination.

Compliment this with a local residents focused email newsletter and social media content strategy. Include online surveys and other opportunities for feedback. Finally consider specialist community participation platforms – either alone or conjunction with government agencies. These include solutions such as Granicus or CityLab that offer a more sophisticated platform for engaging, communicating and consulting with your local community.



See the Community Participation section of Time for DMOCRACY reports for more information.

# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. Learning Lab 5: [Media & Communications Best Practices](#), September 22nd, 2022
2. Case Study: [Mammoth Lakes | Stewardship Messaging](#), November 1st, 2022
3. Case Study: [International Examples | Stewardship Comms](#), November 21st, 2022
4. Featured Research: [Media Analysis on Overtourism](#), December 1st, 2022
5. Featured Research: [Tourism Lexicon](#), December 1st, 2022
6. Case Study: [Live Boricua | Media Engagement](#), December 6th, 2022

## References & Sources:

- i. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- ii. Case Study: [Live Boricua](#) | Media Engagement, December 6<sup>th</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- iii. Case Study: Mammoth Lakes | Stewardship Messaging, November 1<sup>st</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- iv. State of the American Traveler – Destination Analysts, [Traveler Segments Edition, VFR summary – September 2022](#)
- v. State of the American Traveler, 2016 Report, Destination Analysts
- vi. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- vii. The State and Provincial Research Network LISTSERV®, November 18th, 2022: [https://peach.ease.lsoft.com/scripts/wa-PEACH.exe?A0=STATE\\_PROVINCIAL\\_RESEARCHNETWORK&A0=STATE\\_PROVINCIAL\\_RESEARCHNETWORK](https://peach.ease.lsoft.com/scripts/wa-PEACH.exe?A0=STATE_PROVINCIAL_RESEARCHNETWORK&A0=STATE_PROVINCIAL_RESEARCHNETWORK)
- viii. For example, a series of posts from airline passengers having to land in your destination because of weather conditions would be analyzed incorrectly by most media sentiment tools. Such posts would be categorized as negative sentiment for weather in your destination, even though it focuses on bad weather in a different location.
- ix. DMO Survey Summary: <https://northamerica.timefordmocracy.com/>
- x. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xi. Case Study: [Live Boricua](#) | Media Engagement, December 6<sup>th</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xii. Toolbox for Crisis Communications in Tourism: Checklist and Best Practices, UNWTO, 2011: <https://www.e-unwto.org/doi/book/10.18111/9789284413652>
- xiii. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xiv. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xv. Involving a Broad and Diverse Range of Stakeholders in Advocacy, University of South Carolina and North Carolina State University, December 2022, [https://sc.edu/study/colleges\\_schools/hrsm/research/centers/richardson\\_family\\_smartstate/insights/actionable\\_advocacy/](https://sc.edu/study/colleges_schools/hrsm/research/centers/richardson_family_smartstate/insights/actionable_advocacy/)
- xvi. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xvii. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xviii. Featured Research: Tourism Lexicon, December 1<sup>st</sup>, 2022: <https://northamerica.timefordmocracy.com/>
- xix. Learning Lab 5: Media & Communications Best Practices, September 22<sup>nd</sup>, 2022: <https://northamerica.timefordmocracy.com/>

### Other Resources:

Media Analysis and Sentiment Reports for the Destination Partners in the Time for DMOcracy study from the Social Media Insights Lab, [College of Information and Communications at the University of South Carolina](#)

[Overtourism: An Analysis of Its Coverage in the Media by Using Framing Theory](#), Tourism Review International- Clark & Nyaupane, 2020,

[Social Media and Crisis Communication in Tourism and Hospitality](#), Barbe & Pennington-Gray, Handbook for e-Tourism, 2020

[Destination Image Through Social Media Analytics and Survey Method](#), Lin, Liang, Xue, Pan, & Schroeder, International Journal of Contemporary Hospitality Management, 2021

[About the Lexicon](#), Destinations International

[Tourism Lexicon: United States \(2021 Release\)](#), Destinations International

[Tourism Lexicon: Canada \(Newest Release\)](#), Destinations International

[Tourism Lexicon: Australia Edition \(2021 Release\)](#), Destinations International

[The Pandemic Lexicon](#), Destinations International

[The New Tourism Lexicon: Rewriting Our Industry's Narrative](#), Destinations International, July 2018

[Advocacy in the Face of Ideology](#), December 2017

[Toolbox for Crisis Communication in Tourism](#), UN World Tourism Organization, 2011





# Global Best Practices in Community Engagement

Section 6 of 6



[northamerica.timefordmocracy.com](http://northamerica.timefordmocracy.com)

## Acknowledgement and Thanks

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

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

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### Knowledge Partners on Short Term Rentals

Thank you to our Knowledge Partners who contributed their insights and expertise to the Short-Term Rentals section of the Time for DMOcracy report:



### Program, Agency and Association Partners in Time for DMOcracy (North America)



For a full list of the partners & supporters of Time for DMOcracy see each section of the report, the European edition and TimeforDMOcracy.com

# Introduction

Short Term Rentals (STRs) emerged during our early consultation on the North American edition of Time for DMOcracy as an important and growing community issue. The expansion of STRs in a growing number of destinations are creating both opportunities and concerns across North American communities.

Lead Author: Chris Adams, Head of Research & Insights at Miles Partnership. In collaboration with the team at Miles



Partnership and other partners in the Time for DMOcracy study.

## At a Glance

- Short Term Rentals (STRs) are now 15–20% of visitor accommodation in North America and an important lodging option & visitor experience in many destinations
- STRs numbers and growth has been highly variable with mountain and coastal areas seeing dramatic growth but cities, impacted more by the pandemic, seeing a far slower rebound, with tightening STR regulations
- STRs’ growth has created highly variable but significant impacts on local communities in an increasing number of North American destinations, especially mountain and coastal areas
- Only a small minority (13%) of DMOs have any current involvement in STR marketing or management – a significant disconnect given their importance in tourism and these community impacts
- We identified and assessed 5 significant impacts from STRs on the community – two positive and three negatives.

### WHAT TO KNOW

- These positive impacts include (i.) economic opportunities for both hosts and supporting community businesses plus (ii.) the billions in bed and other taxes/levies being generated for local governments (and in a few cases, DMOs) across North America.
- Negative impacts from STRs include (i.) the impact of growth on housing availability and affordability for longer term residents including tourism workers, (ii.) noise, parking and other impacts on neighbors and finally, iii. the broader impact of STRs on the 'character' and 'feel' of a neighborhood or area. In this, local resident perceptions are most important.

## WHAT TO DO

Time for DMOcracy identifies 8 practical recommendations for how DMOs can contribute to a Short-Term Rental sector that is seen as overwhelmingly positive by their community:

1. Get Engaged: Start early and stay involved as a partner in STR management & marketing
2. Know the Sector: Ensure there is a robust system of research, consultation & data collection
3. Integrate STR Management and Marketing with Your Overall Tourism Strategy
4. Help Develop or Update your Community's STR Management Plan & Regulations
5. Customize STR Management: Target by Neighborhood, Housing Type &/or Type of Host.
6. Support Industry Self-Regulation: Including Industry Standards & Guest Education
7. Inclusive STR Registration: Implement a simple, low cost and broad based STR registration system
8. Collect & Allocate STR Tax Revenue: Including funding for your DMO's activities

## RESOURCES

We highlight and share a range of critical research, case study examples and other resources to inform your action. See Page 16.

# What To Know

## CRITICAL LEARNINGS AND INSIGHTS

### a. Growth of Short-Term Rentals

Short Term Rentals (STRs) have long been a part of visitor accommodation in many destinations, particularly in tourism-focused areas including coastal and mountain destinations. In the last decade however, they have increased in number and in impact on both the tourism sector and local communities with the use of Peer-to-Peer online platforms including Airbnb and VRBO (part of the Expedia Group). As of October 2022, there are more than 1.7 million STRs listed in the United State and 200,000 in Canada (i). An estimated 15 - 20% of visitor accommodation in North America is now in some type of vacation rental (ii). However, this growth in recent years has been variable—while some destinations, notably in natural areas, have seen a dramatic increase in STRs, they have also been significantly impacted by the pandemic in many larger urban locations and/or by an increasing presence of regulations developed by local governments.

An estimated 15-20% of visitor accommodation in North America is now in some type of vacation rental

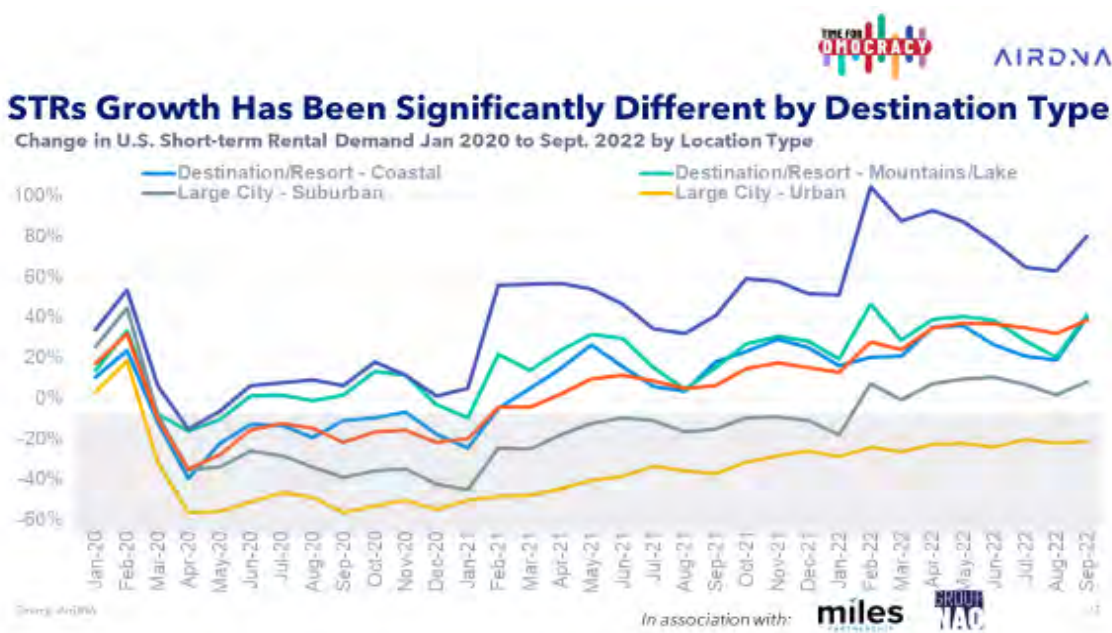


Figure 1 STR inventory has seen rapid growth during the pandemic in mountain, lake and coastal areas while large cities saw a sharp decline and only slow recovery, moderated by increasing regulations. Source Airdna.

## b. Short-Term Rentals and Tourism

Around half of all U.S. and Canadian travelers stay in a STR at least once in a typical year (iii). This number has sharply risen in recent years—especially during the pandemic when almost 50% of visitors staying in a STR were doing so for the first time (iv). While around 40% of travelers consider both commercial hotels/motels and STRs when planning a trip, they tend to see STRs and hotels as offering very different features and benefits. Guests who choose STRs seek “character in a rental” according to research from Phocuswright highlighting that nearly 90% of travelers actively seek properties with an interesting look and feel (v). STRs are therefore primarily complementary rather than competitive to hotels, enriching the accommodation options in a destination. They are also vital accommodations during major events and in rural communities or city neighborhoods where there may be limited accommodation options.

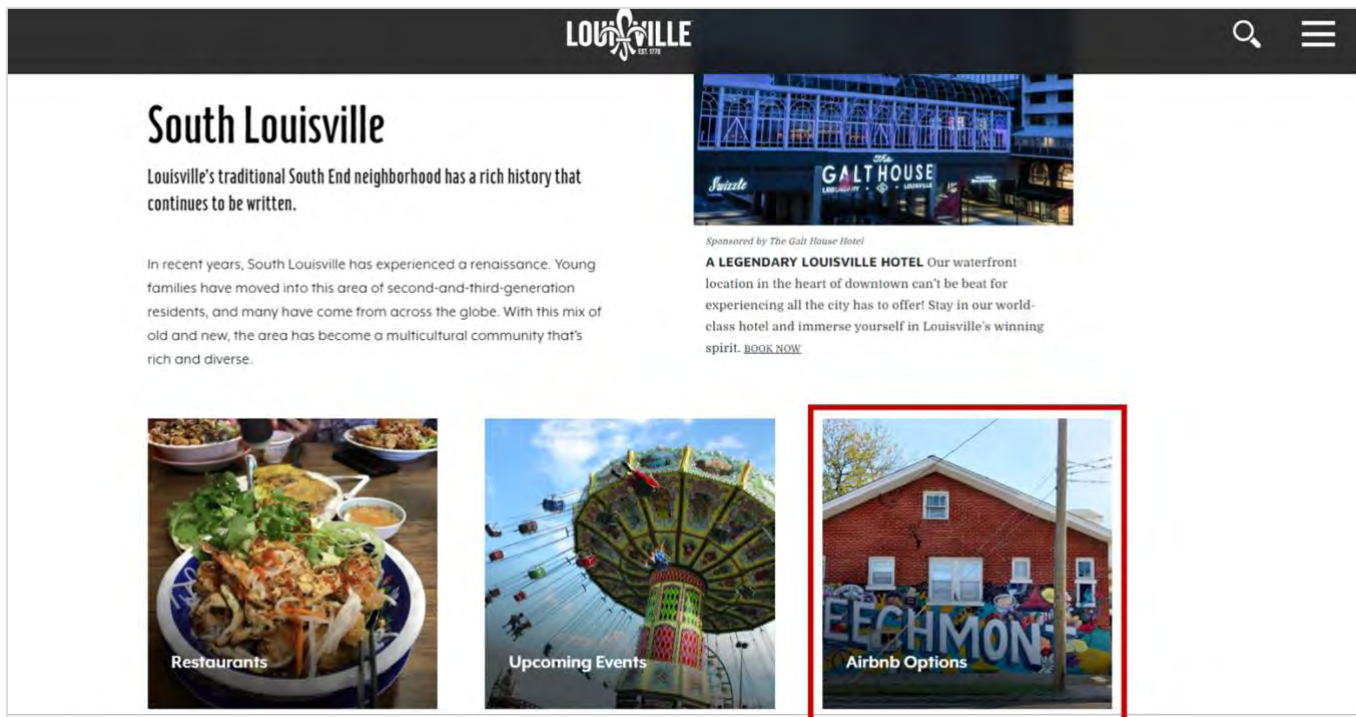
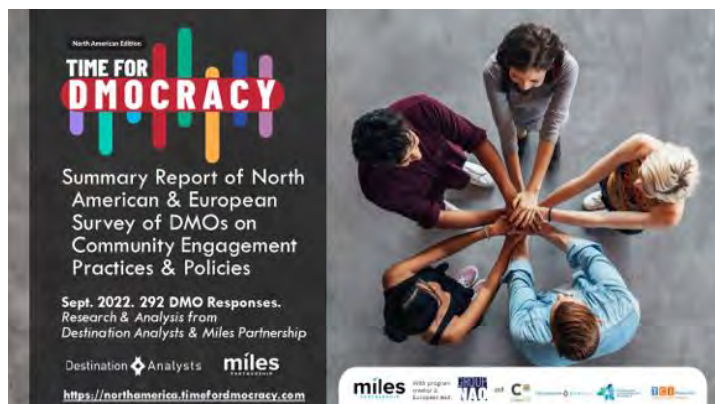


Figure 2 Louisville, Kentucky is one of an increasing number of DMOs to highlight and promote STRs in their marketing



Figure 3 Regions can grow tourism by supporting STRs that become destinations in their right – such as [Idaho’s “Potato Hotel”](#) or Glamping in Red River Gorge, Kentucky (see above)

### c. Involvement of DMO’s in Short Term Rentals



The growth of STRs has been a controversial issue for many Destination Marketing Organizations—especially CVBs and Chambers with strong hotel partners and/or members. Many DMOs have heard from their local hotel partners that STRs are direct competition and should not be an area of focus for the DMO despite most major hotel groups now having their own STR investments and/or divisions including [Marriott](#) and [Accor](#) (vi). This industry

feedback is an important reason why only a small percentage of DMOs are currently actively engaged in marketing and/or managing STRs. Just 5% of DMOs in our survey of DMOs across North America indicated that they are involved in helping manage STRs in their communities (vii).

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**Just 5% of DMOs in our survey of DMOs across North America indicated they are involved in helping manage STRs in their communities**

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## d. Community Impacts of Short-Term Rentals

“Uneven growth, uneven impacts”—this was the title of the first comprehensive analysis of STRs in Canada and could be applied across North America and globally to the impacts of STRs on communities (ix). Our study shows that Short-Term Rentals generate a range of both positive and negative impacts on the community—two positive impacts and three negative impacts.

### Impact: Economic Opportunities from Short-Term Rentals

STRs generate a range of economic benefits for communities. This starts with a valuable secondary source of income for local residents who are hosts. More broadly, STRs generate visitor spending that contributes to employment opportunities at local businesses, including restaurants, cafes and grocery stores. Once measured, this economic opportunity can be significant. A 2022 study by Tourism Economics on Greater Palm Springs estimated a total economic impact of almost \$1 billion and 4,649 jobs created by Short-Term Rentals in the community (x). Commercially managed STRs still generate local economic benefits, although commercial management tends to increase the potential for economic leakage. Studies find a generally good understanding of these economic benefits among American and Canadian residents, with around 50% agreeing in an October 2022, survey that “accommodation services like Airbnb and Vrbo provide economic opportunities for residents” (xi).



Figure 3 Tourism Economics study highlighted the size and significance of STRs in Greater Palm Springs as well as the potential impacts of regulations

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54% of Canadians and 48% of Americans agree that STRs “provide economic opportunities for residents”

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**Impact: Tax Collections & Revenue for Local Communities**



Figure 4 Funding Futures is a major study on tourism taxes and funding for DMOs and includes a section on STRS including 4 best practices in STR policies.

With 15-20% of visitors now staying in STRs, the tax revenues produced can directly benefit local communities. They can be used to manage the negative impacts of STRs, invest in community services and help fund affordable housing. Current local occupancy and sales tax receipts from STRs are estimated in the billions of dollars per annum across North America, but continuing issues with tax laws, regulations, compliance issues and collection agreements with major platforms mean that billions more tax dollars are not being collected. Another major issue is that these tax receipts often end up going into general government spending, resulting in a comparatively low percentage being directed towards managing Short-Term Rentals or investing in affordable housing.

This is a widespread problem with tourism taxes—the industry generates significant revenue for local communities, but very little is being reinvested in managing tourism’s impacts and ensuring it directly benefits the community.

With the growth of STRs, an increasing number of communities are seeing negative impacts which are often far obvious and fundamental to the local residents. The major concerns about STRs can be categorized into 3 areas:

**Impact: The impact of STRs on housing**

In many communities the expanding presence of STRs is viewed as a problem due to their adverse effect on the availability and/or affordability of housing, including for tourism and hospitality workers.

A major study in October 2022, by Longwoods International of resident sentiment showed that only 16% of Canadians and 28% of Americans disagreed with the following statement: “Accommodation-sharing services like Airbnb, Vrbo, can cause inflation in rents, raising the cost of living for locals.” 28% of Canadians and 26% of Americans were undecided and 58% and 42% respectively agreed with the statement (x).

Such widespread perceptions drive action from politicians and voters. For example, multiple Colorado counties and towns in November 2022 approved ballot measures to shift lodging tax revenue from tourism marketing to local community initiatives, including affordable housing. These ballot measures were enabled by a new Colorado State law allowing municipalities to let voters decide how to allocate up to 90% of lodging tax funds to areas outside of tourism promotion (x).



Figure 5 Steamboat Springs is one Colorado mountain community where residents voted to move bed tax revenue from tourism promotion into community initiatives including housing

## 58% of Canadians and 43% of Americans agree that STRs “cause inflation in rents, raising the cost of living for locals”

Despite these perceptions, a range of studies indicate only modest impacts of STRs on the availability and affordability of housing in many communities. Such impacts are often moderate compared to the longer-term housing supply constraints versus growing population challenges faced by many communities: reviewing studies from 2016 in Los Angeles to 2018 in Canada, and 2022 in Colorado and California. For example, a 2022 study of STRs In California by the independent, not for profit think tank, the Milken Institute, concluded “STRs account for about only 1 percent of California’s housing stock and most are expensive single-family homes that would not otherwise add to needed affordable housing supply.” The 2022 Colorado study (which it should be noted was undertaken by Airbnb and a partner, HRA), had a similar conclusion, as did input provided to the Learning Lab on Short Term Rentals by the Greater Palm Springs CVB on the mix and use of STRs in their community. (xi). However, it is important that communities complete their own local, customized study.

## Impact: Noise, Parking, Traffic and Other Impacts on Local Communities

There is a widespread perception of STRs creating issues in local communities. A major October 2022 study highlighted that around 50% of all Canadians and Americans agree STRs “can be disruptive to local neighborhoods” (xii). In reality, the impact of noise and parking issues caused by the presence of an STR seems to be localized and occasional with specific instances amplified by the local media. Noise complaints appear to be largely limited to a relatively small number of rentals—often described as “Party Houses.” In fact, a limited number of studies indicate that there is no significant difference between noise complaints related to Short-term vs. Long Term Rental housing (ix).

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### 52% of Canadians and 42% of Americans agree that people who use STRs “can be disruptive to neighborhoods”

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## Issue: Changes to Communities and Neighborhoods

A broader and more fundamental concern about STRs is their impact on the unique “character,” “feel” and “connections and values” of local communities. This includes the loss of long-term resident housing and an imbalance in the ratio of locals to visitors, particularly in neighborhoods or rural areas primarily populated by long-term residents. These concerns go to the heart of having a community which sees itself as a great place to live and work—with a strong, cohesive and supportive community.

These concerns are often difficult to quantify but are central to how local residents feel about STRs. Therefore, resident perception, rather than other more objective measures (eg: the ratio of STR room nights to resident population) is noteworthy when attempting to understand the impact of STRs on each neighborhood or area. Resident sentiment research is an essential tool—carried out by surveying local residents about their perception of STRs and their impact on the ‘character’ or ‘feel’ of their community. When combined, research and data can help define the ‘carrying capacity’ for STRs in any specific community—a critical part of effectively managing STRs.



Mexico City is the latest city to grapple with changes in neighborhoods created by poorly managed growth in Short Term Rentals. See [‘You’re Not Welcome – Mexico City Residents Decry Airbnb’](#), December 2022.

# What To Do

## 8 PRACTICAL RECOMMENDATIONS AND ACTIONS

1. Get Engaged: Start early and stay involved as a partner in STR management and marketing
2. Know the Sector: Ensure there is a robust system of research, consultation and data collection
3. Integrate STR Management and Marketing with Your Overall Tourism Strategy
4. Help Develop or Update your Community's STR Management Plan and Regulations
5. Customize STR Management: Target by Neighborhood, Housing Type and/or Type of Host.
6. Support Industry Self-Regulation: Including Industry Standards and Guest Education
7. Inclusive STR Registration: Implement a simple, low cost and broad based STR registration system
8. Collect & Allocate STR Tax Revenue: Including funding for the Community, Affordable Housing and your DMO's activities

### 1. Get engaged

**Start early and stay involved as a partner in STR management and marketing.**

Short-Term Rentals are now a significant part of tourism in many destinations and often an important issue that local communities want to see better managed. DMOs should have a role in both their marketing **and** management. Good management of STRs require a coordinated response from multiple agencies. Connect and coordinate with your local government on how best you can be involved in Short-Term Rentals. Get the support of your board and Include specific STR objectives, activities and resourcing for these initiatives in your annual planning.



**Figure 6** Galveston Texas has one of the most comprehensive policies and practices on STR marketing and management. [Watch a presentation on their approach to STRs available at Time for DMOCRacy](#)

## 2. Know the sector

### Ensure there is a robust system of research, consultation and data collection

Work with your government and industry partners to ensure your community has high-quality consultation, research and data on STRs in your community. Integrate the topic of STRs into your community participation engagement and resident sentiment research. Invest in regular reporting on the size and performance of the STR sector. Conduct periodic, deeper analyses of how STRs benefit tourism and the local economy and impact local neighborhoods with attention to noise complaints, neighborhood integrity and housing. Airbnb has developed a “City Portal” to offer

enhanced reporting to destinations on STRs in their community – and worked with the World Travel and Tourism Council on a best practices document that proposes 4 best practices including a focus on professional STR data collection and sharing with other agencies, plus Digital Registration, Smart Taxation and Long Term Community Investment.

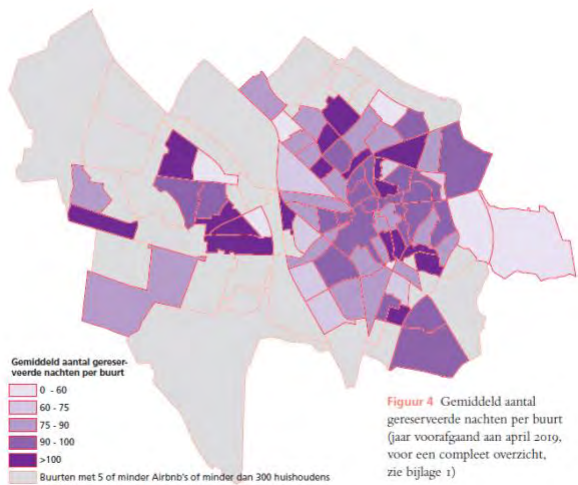


Figure 7 Ensure your STR research and analysis measures STRs down to a neighborhood area to better understand each local community's situation and needs

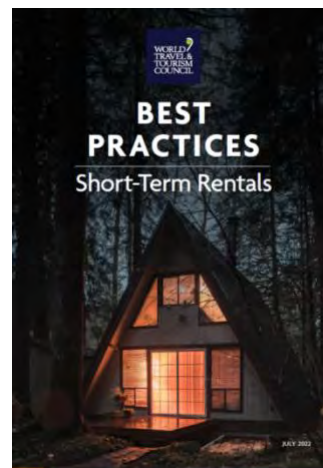


Figure 8 The World Travel and Tourism Council (WTC) and Airbnb report on Best Practices in Short Term Rentals also includes case studies from around the world.

## 3. Integrate STR management and marketing with your overall tourism strategy

As an important and often growing part of the hospitality and tourism sector, Short Term Rentals marketing and management needs to be integrated with your overall destination development strategy and tourism marketing efforts – highlighting the complimentary options in accommodation from major hotels to unique Short-Term Rentals.

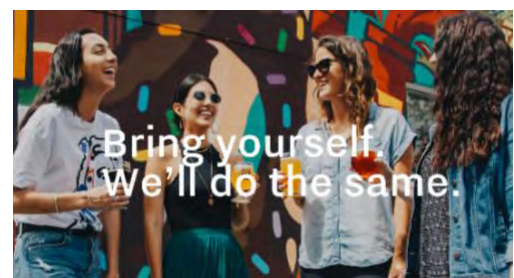


Figure 9 The Netherlands Tourism & Convention Board are working at a national level to coordinate and support smart STR management strategies across communities.

#### 4. Help develop or update your community's STR management plan and regulations

Using the insights from #1 to #3 and by working with local government and agency partners, ensure you have a balanced list of “future-focused” STR regulations and a community-focused management plan—a plan that maximizes the benefits of STRs while measuring, minimizing and mitigating their negative impacts. Provide input into regulations that balance the needs of various stakeholders including hosts, hospitality and tourism businesses and most importantly, local residents and community organizations.



Figure 10 Greater Palm Springs has different STR regulations and management policies for single family homes, see left above, which are the focus of the vacation rental market, and apartment blocks or multifamily units (see right) primarily used by workers

#### 5. Customize STR management

**Target by neighborhood, housing type and/or type of host.**

Ensure your management plan is localized to the characteristics and needs of local areas and neighborhoods. Commercial and/or tourism areas, for example, should be managed differently than established, residential neighborhoods. Use zones to localize guidelines and regulations rather than a one-size-fits-all approach.

There is also a significant difference between owner-occupier, part-time hosts (the original vision of sites like Airbnb) and full-time, professional host companies. Consider different rules and requirements based on the host's professionalism—ie: lighter regulations for part-time, owner-occupier hosts vs. full-time, professional/corporate hosts.



## 6. Support industry self regulation

### Including standards and guest education

Work with STR hosts on smart, sensible self-regulation within the sector. Develop or update an industry code of conduct for hosts including educating STR guests on their responsibilities while visiting - a "Good Neighbor" policy. Focus on a smart balance of self-regulation and local government rules and regulation.

Figure 11 Galveston, Texas has one of the US' most sophisticated approaches to STR management including an industry partnership that developed a Good Neighbor guideline for STR guests and a STR registration program integrated with the major online platforms

## 7. Ensure inclusive STR registration

### Implement a simple, low-cost and broad-based STR registration system

A critical best practice that emerged from our study is the importance of an efficient registration system for all STRs in your community. Keep it simple, low cost and inclusive to maximize participation. An increasing number of destinations have agreements with major platforms (Airbnb and VRBO) stating that properties cannot be listed without a registration number. This is also linked to tax collection and payment agreements with these platforms. This boosts participation and reduces enforcement issues.

## 8. Collect and allocate STR tax revenue

### Including funding for the Community, Affordable Housing & your DMO's activities

Work with local, State and Provincial government partners to ensure your community is collecting & receiving all the appropriate taxes that visitor accommodation should pay. This includes ensuring your tax legislation adequately deals with STRs, you have a registration system in place (see #5) and that you have a collection agreement with the major platforms. Consider partnering with other communities to share costs, expertise and coordinate your approach to the Airbnb, VRBO etc.

The funding can be significant; for example, \$5.8 million in STR taxes collected in Galveston and ~\$12.5 million per annum in Puerto Rico from Airbnb alone. Invest a significant proportion of these funds back into the community, including projects where local residents have a voice. This includes investment in community housing - learning from communities as diverse as Mammoth Lakes, CA and Summit Country, CO who are investing in affordable housing (xvii). Finally, ensure your DMO has dedicated proportion of this funding to added to its budget to fund its STR marketing and support of STR management.

# Resources to Use

## IMPORTANT RESEARCH, ANALYSIS & OTHER RESOURCES

### Highlighted Resources:

1. Learning Lab 6: Short-Term Rentals and Housing Issues, November 3rd, 2022: <https://northamerica.timefordmocracy.com/> Presentations from Airdna on latest STR trends, World Travel and Tourism Council on their joint study with Airbnb, Toposophy (European agency working with Hospitality Europe), Netherlands Tourism & Convention Board and Greater Palm Springs CVB on their STR management policies.
2. Time for DMOCRACY Survey of 292 North American and European DMOs, August 2022 <https://northamerica.timefordmocracy.com/>
3. [Short Term Rental Best Practices](#), World Travel and Tourism Council and Airbnb, 2022
4. Community Awareness – Resident Sentiment Towards Tourism, Longwoods research presentation at Destination International Advocacy Summit, October 2022
5. Case Study: Breckenridge – Breckenridge Chamber and private sector partners collaboration including STRs, Housing and Workforce, November 2022. <https://northamerica.timefordmocracy.com/>
6. Case Study: Short-Term Rentals: Visit Galveston – in Person presentation, Learning Lab, July 2022. Time for DMOCRACY – Short Term Rentals – YouTube
7. Colorado Short-term Rental Impact Study, [HRA and Airbnb](#), May 2022
8. Analysis of Policy Restrictions on Short-Term Rentals for Visit Greater Palm Springs, Report by Tourism Economics, September 2022 and Skift Article, October 19, 2022 (also see presentation in Learning Lab)
9. Position Paper on EU-wide Regulation of Short-Term Rentals, Hospitality Europe and Toposophy
10. Short-Term Rentals in Canada – Uneven growth, uneven impacts, Canadian Journal of Urban Research, 2019



## References:

- i. Estimate based on Airdna analysis completed in late October 2022 for the Time for DMOCRACY program. This estimated 13% of visitor accommodation inventory was Short-Term Rentals listed on the two major platforms alone – Airbnb and VRBO.
- ii. Estimate made by Miles Partnership based on data from Airdna, Phocuswright and other sources cited.
- iii. ‘Through the Roof: U.S. Short-Term Rentals, 2021’ Phocuswright
- iv. 43% of STR users in 2021 who most recently stayed in an STR were first-time users compared to just 35% in 2019 – ‘Through the Roof: U.S. Short-Term Rentals, 2021’ Phocuswright
- v. Through the Roof: U.S. Short-Term Rentals, 2021’ Phocuswright
- vi. Feedback from a range of DMO consultation including the STR Learning Lab on STRs – Partner DMO Discussion Group, Major Cities Group, October 23rd, 2022
- vii. Examples of a major hotel group with an STR division include Accor and Marriot. See analysis: “A New Marriot Division Goes Head to Head with Airbnb”, 2019, NYTimes.
- viii. Summary Report of Survey of North American and European DMOs on Community Engagement, August 2022, Miles Partnership and Destination Analysts. Download Full Report.
- ix. Title of research article in Canadian Journal of Urban Research, 2019, “Short-Term Rentals in Canada: Uneven growth, uneven impacts”
- x. Analysis of Policy Restrictions on Short-Term Rentals for Visit Greater Palm Springs, Report by Tourism Economics, September 2022 and Skift Article, October 19th 2022
- xi. Community Awareness – Resident Sentiment Towards Tourism, Longwoods research presentation at Destination International Advocacy Summit, October 2022
- xii. Average Noise Levels Compared in Short Term Rentals and Long Term Occupied Homes summary of study by NoiseAware , 2018, VRM intel.
- xiii. Colorado Communities Passed Ballot Measures to Shift Tourism Marketing Dollars, November 2022, Skift
- xiv. There’s never been such a severe shortage of homes in the U.S. Here’s Why. 2022, NPR.
- xv. How Airbnb Short-Term Rentals Exacerbate Los Angeles’s Affordable Housing Crisis: Analysis and Policy Recommendations
- xvi. Resident Sentiment Towards Tourism – US and Canada research, October 2022, Longwoods International.
- xvii. Estimate from Miles Partnership based on our work and analysis from ‘Funding Futures’ (2020 and 2021 studies) with Civitas and other partners plus other updated sources such as HVS’ 2022 Lodging Tax Report for the USA.
- xviii. See [‘Housing Now’](#) - the affordable Housing Project In Mammoth Lakes, CA and Sedona, AZ and Summit County, CO’s subsidy programs for long term rentals outlined In this [Wired Article, December 2022](#)

**Other Resources:**

Featured research: Affordable Housing in a rural tourism-based community, <https://northamerica.timefordmocracy.com/>

Featured research: Summary of Best practices from WTC <https://northamerica.timefordmocracy.com/>

Featured Research: Staying Power – the effects of Short-Term Rentals on California's tourism economy <https://northamerica.timefordmocracy.com/>

Staying Power: [The Effects of Short-Term Rentals on California's Tourism Economy and Housing Affordability](#), Milken Institute, 2022

Research Analyzing Impact of STRs on Housing: Staying Power – The effects of short-term rentals on California's tourism economy, [Milken Institute 2022](#). Also note the Colorado study noted in highlighted resources VII above, the Greater Palm Springs STR analysis in VIII and other research included in 'Resources'. All available at [Time for DMOCracy website](#).

[Affordable Housing in a Rural, Tourism-Based Community](#), Moah, Utah. Summary of [Analysis in PDREdge](#), HUD's Policy Development and Research. Summary at [Time for DMOCracy website](#).

Affordable Housing and the Impact of Short-Term Rentals, [Municipal Research and Services Center of Washington](#) (MRSC), Dec 2021

Third-Party Impacts of Short-Term Rental Accommodation: A Community Survey to Inform Government Responses, Muschter, Caldicott, von der Heide, and Che, [Journal of Sustainable Tourism](#), 2022

Regulating Airbnb: How Cities Deal with Perceived Negative Externalities of Short-Term Rentals, Nieuwland and van Melik, [Current Issues in Tourism](#), 2020

Exploring Destination Engagement of Sharing Economy Accommodation: Case of Australian Second-Homes, Keogh, Kriz, Barnes, and Rosenberger III, [Current Issues in Tourism](#), 2020

Jamaica Commits to Assisting Tourism Workers with Finding Affordable Housing, [Caribbean Today](#), 2022

Hilton Head Island Leaders Look into Improving Workforce Housing, [WTOC](#)

Help Wanted, Apartments Included, [Times Union](#), 2022

Workforce Housing a Growing Need for Employers Entering Tourism Season, June 2022, [MiBiz](#)

The State of Short-Term Rentals in Colorado, [Colorado Lawyer](#), 2022

The Effect of Tourism Activity on Housing Affordability, Mikulić, Vizek, Stojčić, Payne, [Annals of Tourism Research](#), 2021

Airbnb is Running Riot in Small Town America, [Wired Article](#), December 2022