

# Global survey on the perception of residents towards city tourism: impact and measures

# 01

## Introduction & Methodology

# Introduction

This research is a result of a partnership between the World Tourism Organization (UNWTO) and IPSOS.

To better manage the issues arising from the growing tourism demand in urban destinations it is essential to understand resident's experiences and perceptions on city tourism.

The research aims at understanding the perception of residents towards city tourism, its impacts, as well as the most adequate strategies to manage the growing tourism flows in cities.

# Methodology

12.000 online surveys in 15 countries



## Methodology

Online survey.  
December's IPSOS  
Global @dvisor wave.  
Fieldwork from 21st December  
2018 to 14th January 2019.



## Sample

In each country 1.000/500  
individuals representative of  
global population.

Statistically significance  
differences noted in the survey  
are calculated with a confidence  
level of 95%.



## Participants

Adults aged 18-64 in the US and  
Canada, aged 16-64 in all other  
countries.



## 15 Countries

| Country   | Sample | Country           | Sample |
|-----------|--------|-------------------|--------|
| Argentina | 500    | Japan             | 1000   |
| Australia | 1000   | Poland            | 500    |
| Belgium   | 500    | Republic of Korea | 500    |
| Canada    | 1000   | Spain             | 1000   |
| France    | 1000   | Sweden            | 500    |
| Germany   | 1000   | United Kingdom    | 1000   |
| Hungary   | 500    | USA               | 1000   |
| Italy     | 1000   |                   |        |

# 02

## Key Findings



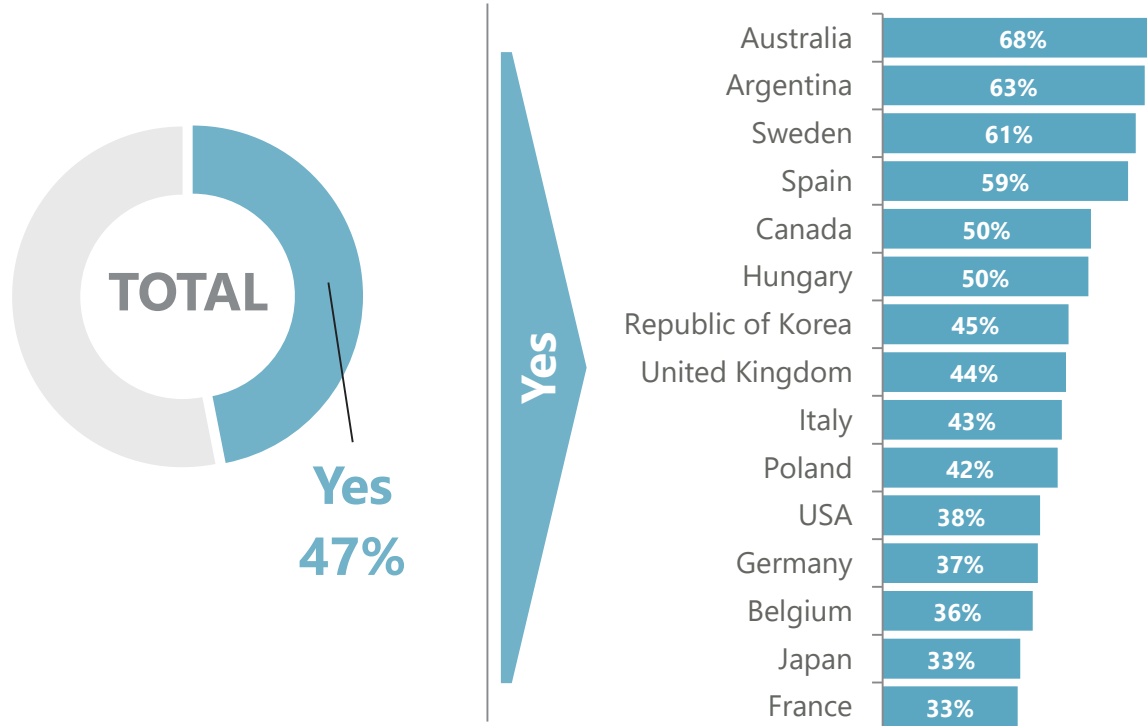
- ✓ **47%** of respondents think 'they reside in cities with a high number of tourists'.
- ✓ On the positive side, **52%** of respondents **think tourism has a big or moderate impact in generating wealth and income**. On the other spectrum, **46%** of respondents **think it 'creates overcrowding'**.
- ✓ **49%** of respondents **feel that there should be measures to better manage tourism**.
- ✓ Respondents are most supportive of the following measures: **'improve infrastructures and facilities' (72%)** and **'create experiences and attractions that benefit both residents and visitors' (71%)**, whereas **only 12% think that there should be limitations to the number of visitors**.

- ✓ The results reveal significant differences according to respondents' socio-demographic profiles:
  - ✓ **By age: young respondents** (under 34 years old) **show more awareness of the positive and negative impacts** and are also **more favourable** to implement **restrictive measures** to manage tourism, while **older respondents** (above 50 years old) **perceive less the negative impacts** of tourism and are **less favourable** to **implement restrictive measures**.
  - ✓ **By education level: more awareness of the positive and negative impacts** of tourism from **those who possess a high level of education**. However, no differences can be perceived regarding the preferences of potential measures to be implemented.

- ✓ **By travelling frequency: the number of respondents who consider they live in cities with a high number of tourists increases with how frequent they travel.** The same occurs with whether **they feel that there should be measures to better manage tourism.**
- ✓ **By household income and sex** no significant differences can be concluded.
- ✓ Based on the respondents' profiles it can be concluded that:
  - ✓ **Age, education level and travelling frequency** of respondents are factors that **contribute to increase and decrease the awareness of the impacts** of tourism and **respondents' preferences in relation to the implementation of measures to better manage tourism.**

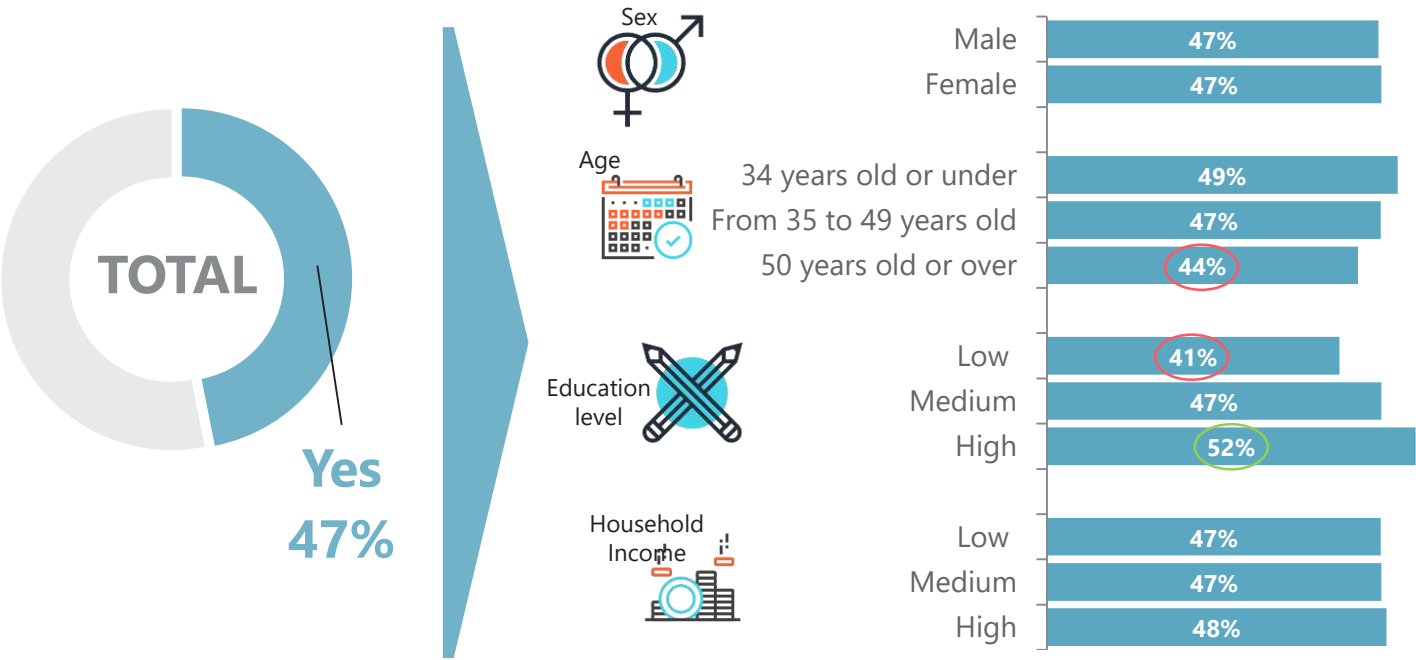
Q1. Do you think you live in a city with a high number of tourists?

**47% of respondents think 'they reside in cities with a high number of tourists'.**



Q1. Do you think you live in a city with a high number of tourists?

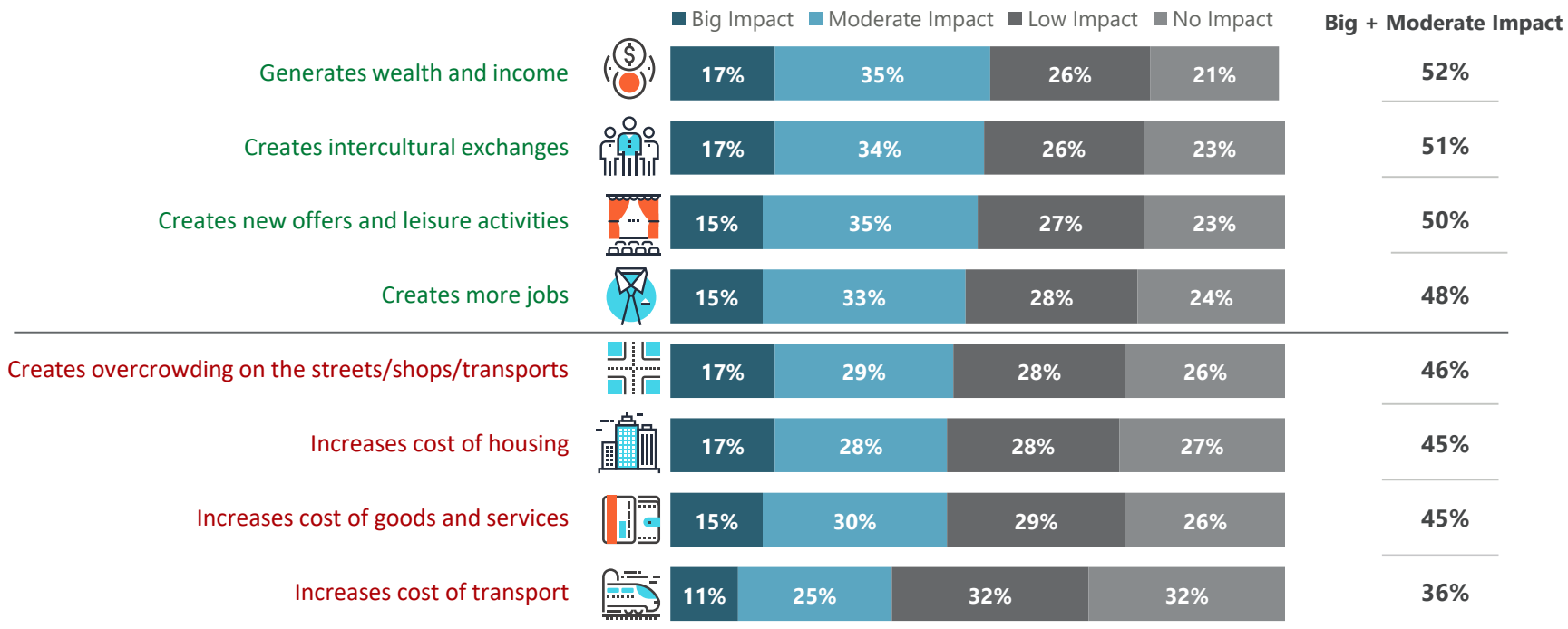
# By socio-demographic profile



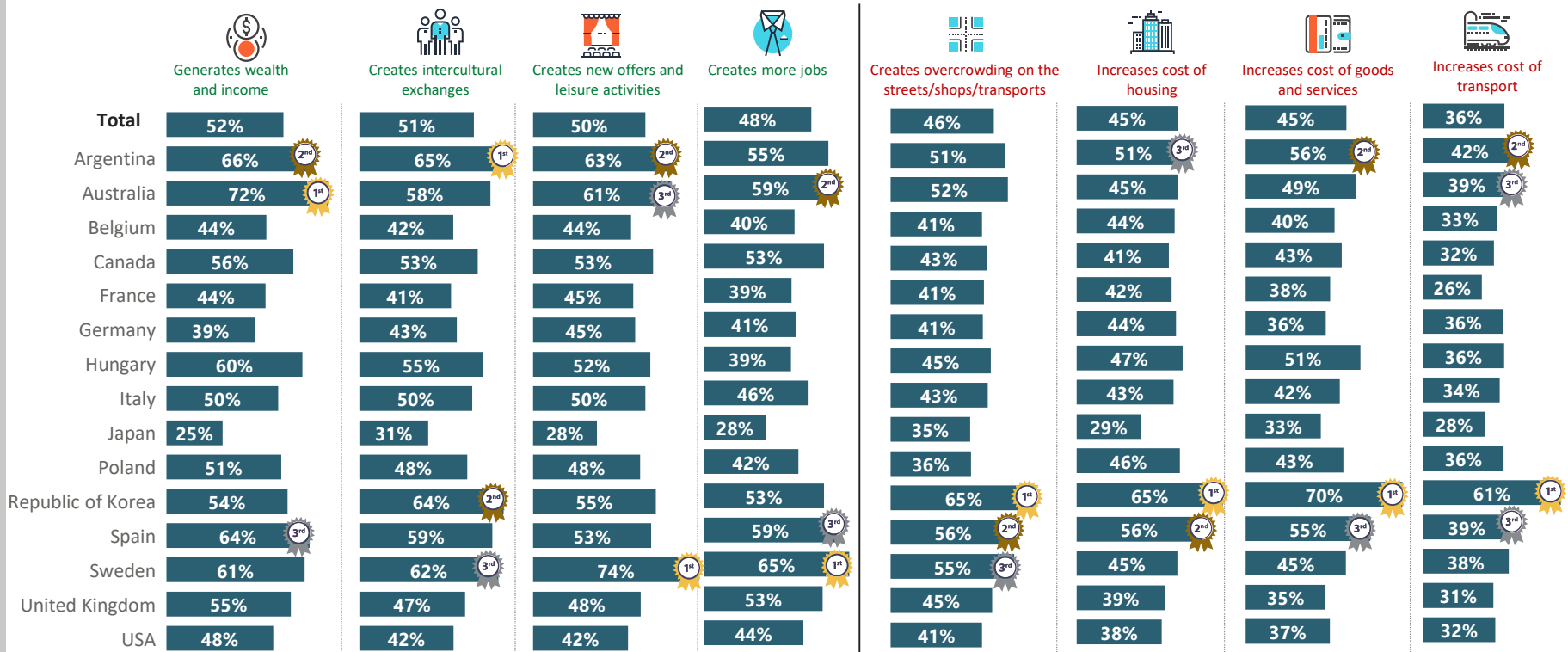
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## Q2. How does tourism impact your city?

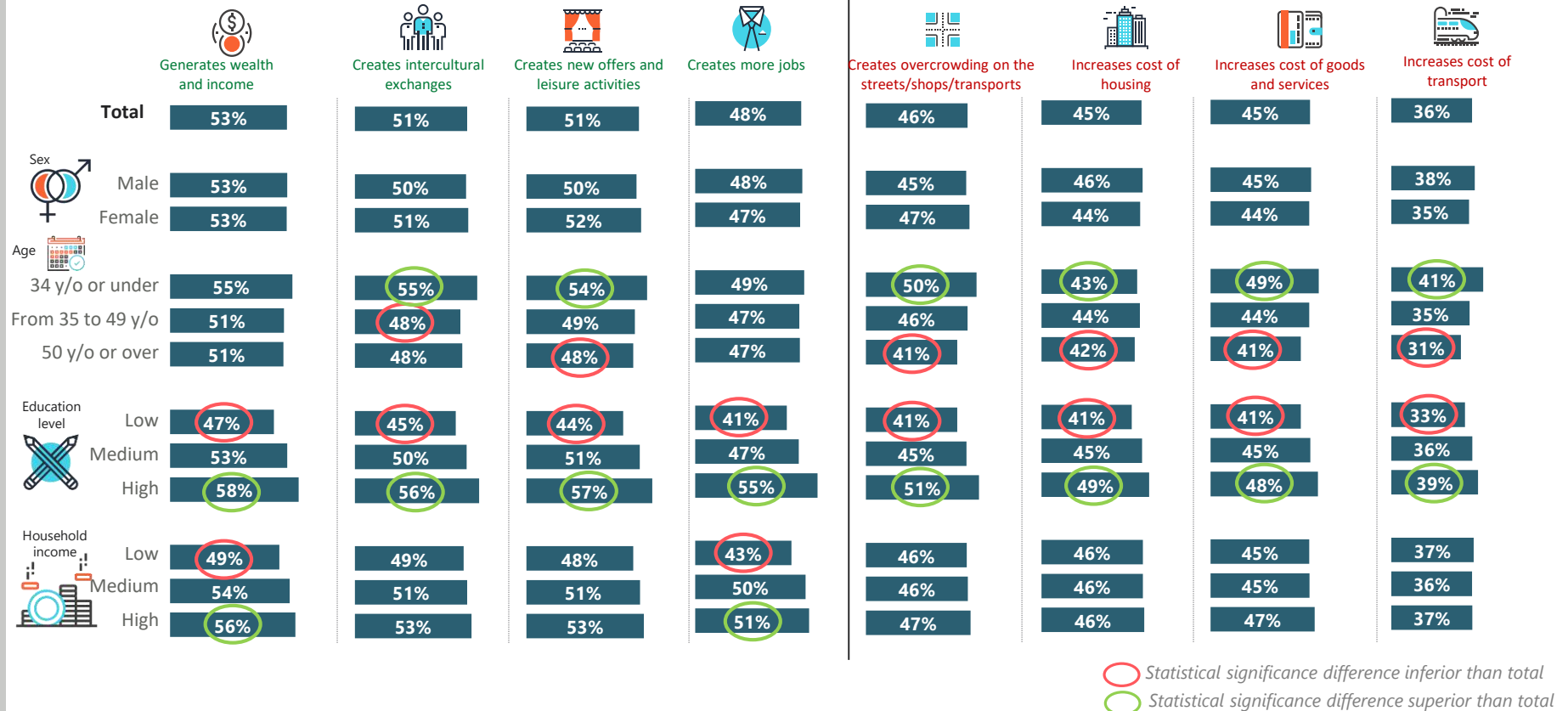
**On the positive side, 52% of respondents think tourism has a big or moderate impact in generating wealth and income. On the other spectrum, 46% of respondents think it 'creates overcrowding'.**



## Q2. How does tourism impact your city? (by country)

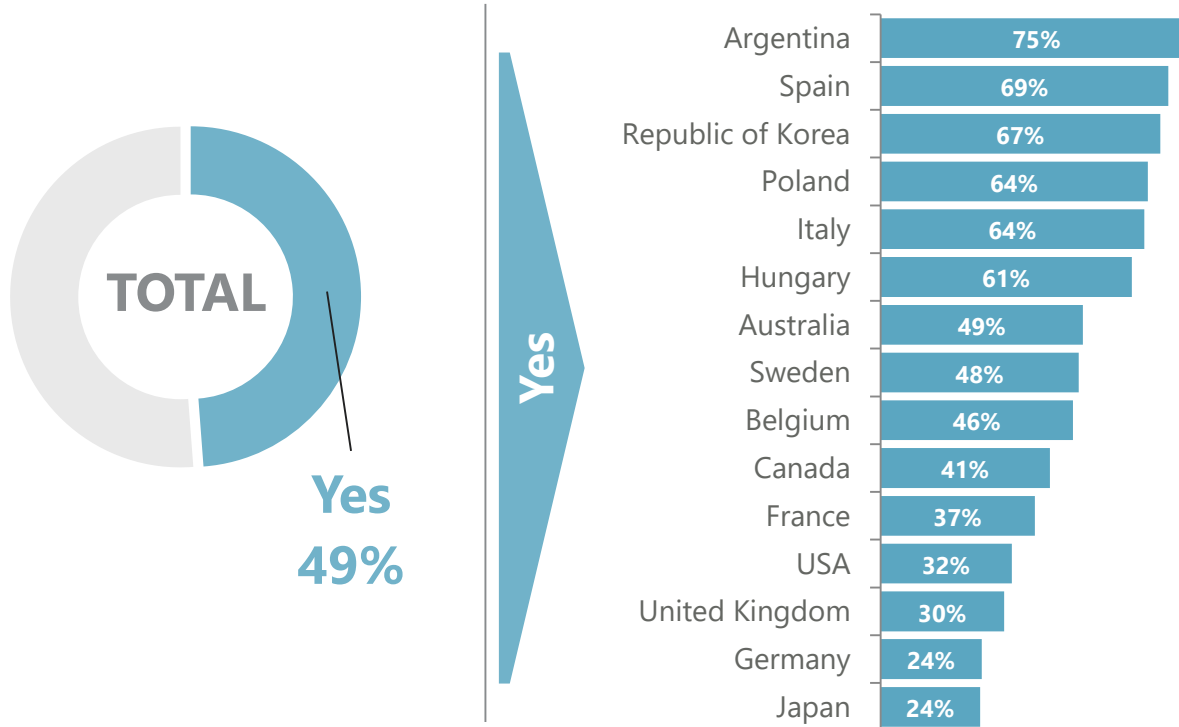


## Q2. How does tourism impact your city? (by socio-demographic profile)



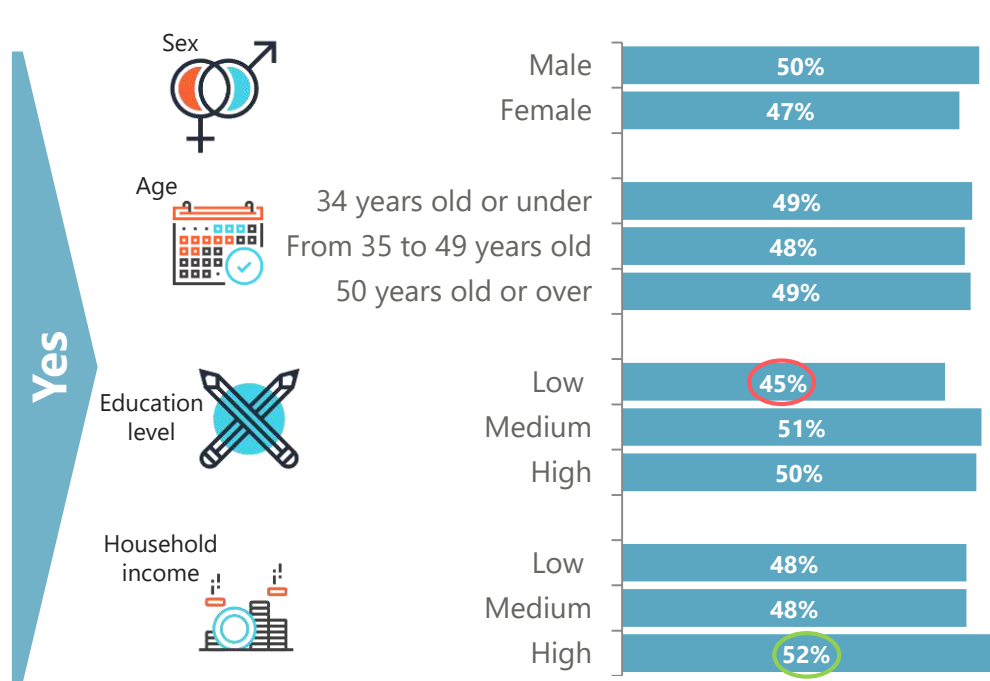
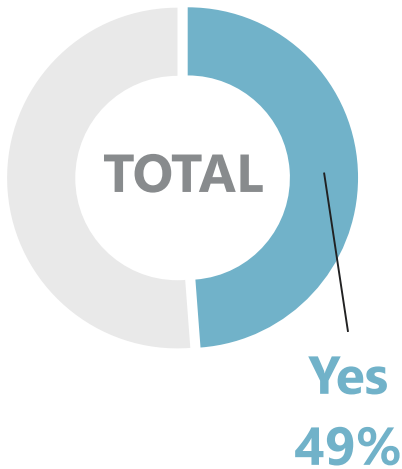
Q3. Do you think there should be measures to manage tourism better in your city?

**49% of respondents feel that there should be measures to better manage city tourism.**



Q3. Do you think there should be measures to manage tourism better in your city?

By socio-demographic profile

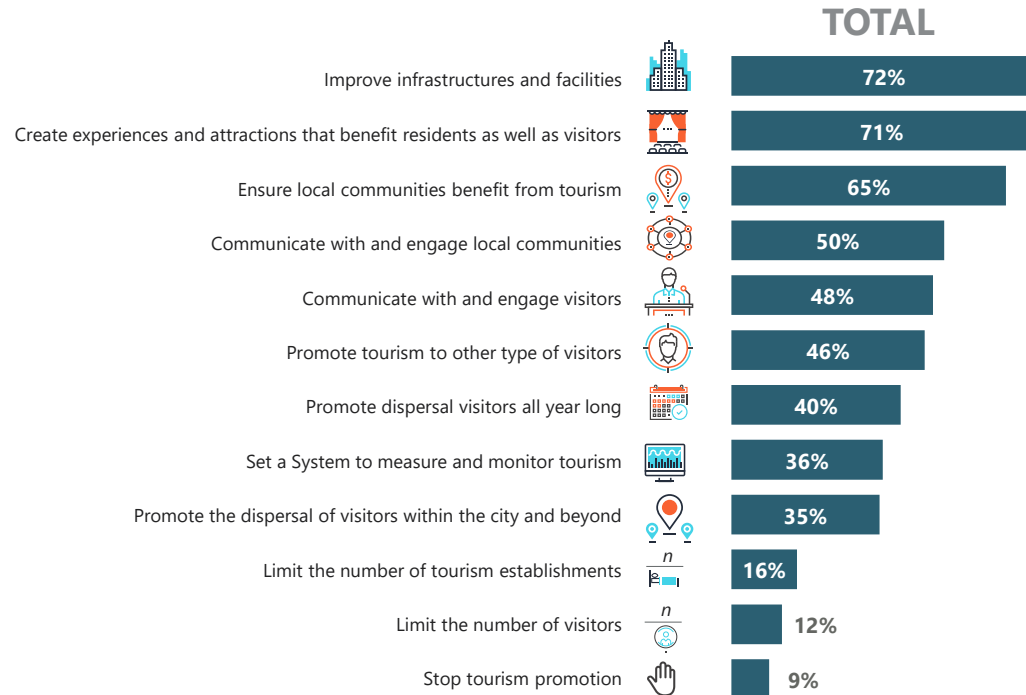


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Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city?

**'Improve infrastructures and facilities' (72%) and 'create experiences and attractions that benefit both residents and visitors' (71%) – the most important measures to address the growing number of visitors.**



# Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city? (by country)

|                                                                                                                                                                 | Argentina           | Australia           | Belgium             | Canada              | France              | Germany             | Hungary             | Italy               | Japan               | Poland              | Rep. of Korea       | Spain               | Sweden              | United Kingdom      | USA                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Improve infrastructures and facilities                                         | 1 <sup>st</sup> 79% | 2 <sup>nd</sup> 75% | 1 <sup>st</sup> 64% | 3 <sup>rd</sup> 68% | 1 <sup>st</sup> 66% | 1 <sup>st</sup> 66% | 1 <sup>st</sup> 89% | 1 <sup>st</sup> 80% | 1 <sup>st</sup> 74% | 3 <sup>rd</sup> 68% | 2 <sup>nd</sup> 69% | 1 <sup>st</sup> 73% | 3 <sup>rd</sup> 61% | 3 <sup>rd</sup> 67% | 3 <sup>rd</sup> 67% |
| Create experiences and attractions that benefit residents as well as visitors  | 2 <sup>nd</sup> 75% | 3 <sup>rd</sup> 70% | 2 <sup>nd</sup> 63% | 1 <sup>st</sup> 82% | 2 <sup>nd</sup> 65% | 2 <sup>nd</sup> 62% | 2 <sup>nd</sup> 82% | 2 <sup>nd</sup> 71% | 2 <sup>nd</sup> 68% | 1 <sup>st</sup> 72% | 1 <sup>st</sup> 74% | 2 <sup>nd</sup> 68% | 2 <sup>nd</sup> 65% | 2 <sup>nd</sup> 71% | 1 <sup>st</sup> 73% |
| Ensure local communities benefit from tourism                                  | 3 <sup>rd</sup> 71% | 1 <sup>st</sup> 77% | 3 <sup>rd</sup> 61% | 2 <sup>nd</sup> 75% | 1 <sup>st</sup> 66% | 3 <sup>rd</sup> 50% | 57%                 | 3 <sup>rd</sup> 69% | 3 <sup>rd</sup> 66% | 57%                 | 3 <sup>rd</sup> 66% | 3 <sup>rd</sup> 55% | 1 <sup>st</sup> 67% | 1 <sup>st</sup> 74% | 2 <sup>nd</sup> 71% |
| Communicate with and engage local communities                                  | 33%                 | 52%                 | 48%                 | 50%                 | 3 <sup>rd</sup> 55% | 36%                 | 3 <sup>rd</sup> 67% | 60%                 | 45%                 | 42%                 | 61%                 | 48%                 | 48%                 | 49%                 | 53%                 |
| Communicate with and engage visitors                                           | 46%                 | 47%                 | 38%                 | 47%                 | 47%                 | 3 <sup>rd</sup> 50% | 52%                 | 60%                 | 55%                 | 36%                 | 55%                 | 37%                 | 55%                 | 47%                 | 49%                 |
| Promote tourism to other type of visitors                                      | 54%                 | 33%                 | 46%                 | 42%                 | 49%                 | 41%                 | 50%                 | 48%                 | 38%                 | 43%                 | 46%                 | 47%                 | 53%                 | 42%                 | 41%                 |
| Promote dispersal visitors all year long                                       | 47%                 | 27%                 | 47%                 | 40%                 | 35%                 | 48%                 | 38%                 | 34%                 | 48%                 | 2 <sup>nd</sup> 70% | 24%                 | 43%                 | 33%                 | 34%                 | 27%                 |
| Set a System to measure and monitor tourism                                    | 27%                 | 43%                 | 44%                 | 37%                 | 42%                 | 27%                 | 29%                 | 29%                 | 22%                 | 32%                 | 57%                 | 36%                 | 28%                 | 38%                 | 42%                 |
| Promote the dispersal of visitors within the city and beyond                   | 41%                 | 31%                 | 36%                 | 32%                 | 32%                 | 40%                 | 28%                 | 30%                 | 48%                 | 46%                 | 20%                 | 42%                 | 42%                 | 31%                 | 33%                 |
| Limit the number of tourism establishments                                     | 11%                 | 18%                 | 22%                 | 10%                 | 17%                 | 34%                 | 4%                  | 11%                 | 18%                 | 15%                 | 13%                 | 20%                 | 23%                 | 18%                 | 17%                 |
| Limit the number of visitors                                                   | 9%                  | 18%                 | 19%                 | 13%                 | 14%                 | 29%                 | 3%                  | 4%                  | 11%                 | 10%                 | 5%                  | 18%                 | 13%                 | 17%                 | 16%                 |
| Stop tourism promotion                                                        | 6%                  | 6%                  | 13%                 | 5%                  | 11%                 | 20%                 | 2%                  | 5%                  | 10%                 | 9%                  | 9%                  | 13%                 | 12%                 | 12%                 | 12%                 |

# Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city? (by socio-demographic profile)



Sex

Age



Education  
level



Household  
income

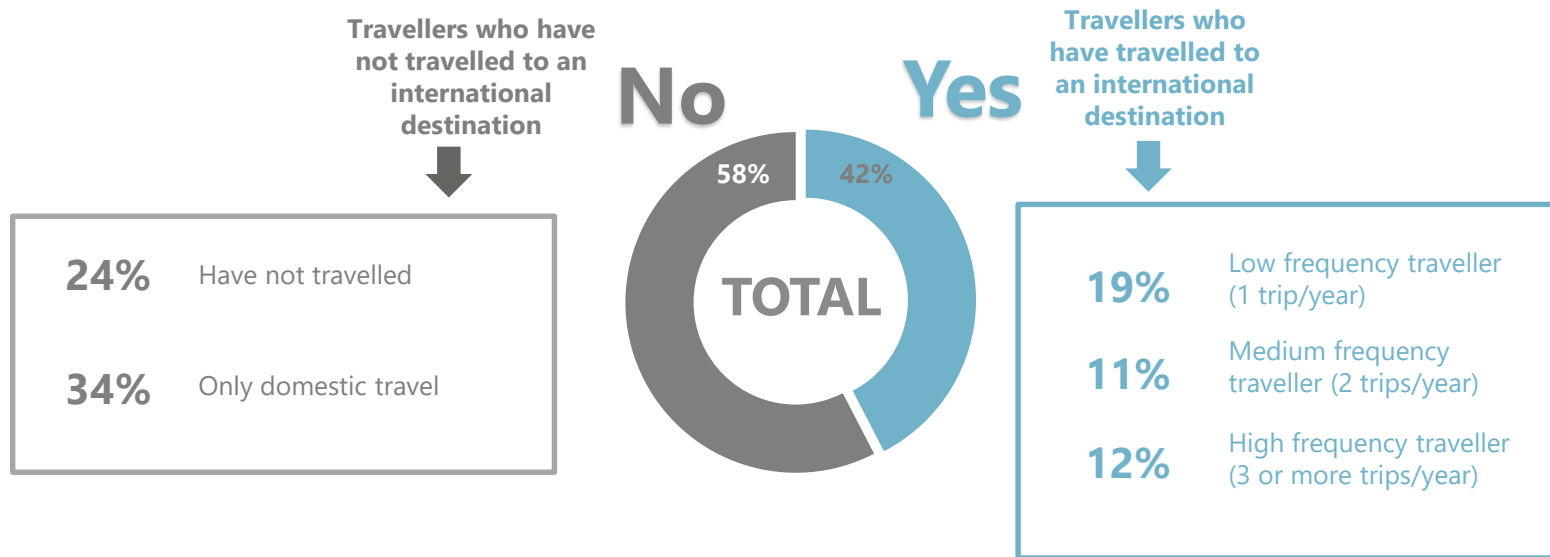


|                                                                               | Total | Male | Female | 34 y/o or under | From 35 to 49 y/o | 50 y/o or over | Low | Medium | High | Low | Medium | High |
|-------------------------------------------------------------------------------|-------|------|--------|-----------------|-------------------|----------------|-----|--------|------|-----|--------|------|
| Improve infrastructures and facilities                                        | 72%   | 72%  | 73%    | 68%             | 72%               | 77%            | 71% | 73%    | 73%  | 69% | 72%    | 75%  |
| Create experiences and attractions that benefit residents as well as visitors | 71%   | 69%  | 74%    | 69%             | 71%               | 75%            | 71% | 70%    | 73%  | 70% | 70%    | 73%  |
| Ensure local communities benefit from tourism                                 | 65%   | 65%  | 66%    | 61%             | 65%               | 69%            | 63% | 65%    | 67%  | 62% | 66%    | 66%  |
| Communicate with and engage local communities                                 | 50%   | 49%  | 52%    | 48%             | 51%               | 53%            | 53% | 49%    | 50%  | 54% | 51%    | 49%  |
| Communicate with and engage visitors                                          | 48%   | 47%  | 49%    | 48%             | 46%               | 49%            | 50% | 47%    | 47%  | 46% | 49%    | 47%  |
| Promote tourism to other type of visitors                                     | 46%   | 47%  | 44%    | 45%             | 47%               | 46%            | 49% | 46%    | 43%  | 48% | 43%    | 48%  |
| Promote dispersal visitors all year long                                      | 40%   | 39%  | 41%    | 39%             | 40%               | 41%            | 39% | 42%    | 39%  | 38% | 40%    | 40%  |
| Set a System to measure and monitor tourism                                   | 36%   | 36%  | 36%    | 38%             | 37%               | 32%            | 34% | 34%    | 40%  | 36% | 38%    | 36%  |
| Promote the dispersal of visitors within the city and beyond                  | 35%   | 35%  | 35%    | 34%             | 37%               | 35%            | 34% | 38%    | 33%  | 35% | 35%    | 34%  |
| Limit the number of tourism establishments $\frac{n}{p}$                      | 16%   | 17%  | 14%    | 21%             | 14%               | 11%            | 16% | 16%    | 16%  | 18% | 17%    | 14%  |
| Limit the number of visitors $\frac{n}{p}$                                    | 12%   | 14%  | 10%    | 16%             | 12%               | 8%             | 13% | 13%    | 11%  | 14% | 12%    | 10%  |
| Stop tourism promotion                                                        | 9%    | 11%  | 7%     | 12%             | 9%                | 5%             | 8%  | 10%    | 9%   | 11% | 8%     | 9%   |

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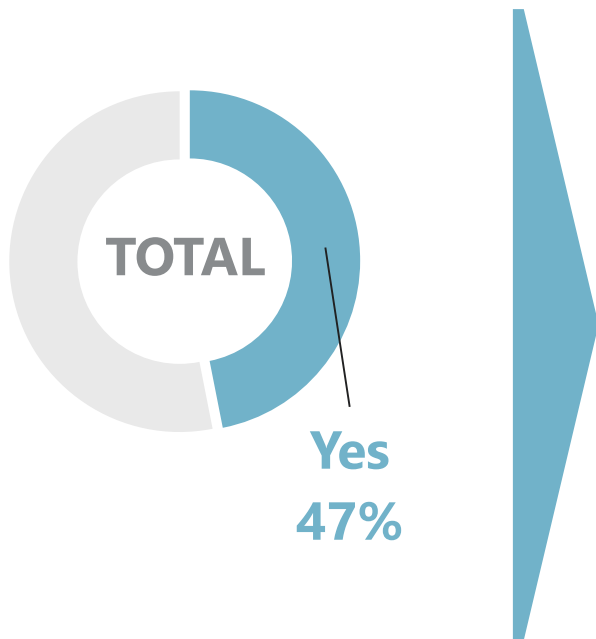
Statistical significance difference superior than total

Q5. How many times have you travelled to an international destination during 2018 (one night minimum)?



Q1. Do you think you live in a city with a high number of tourists?

Q5. How many times have you travelled to an international destination during 2018 (one night minimum)?



**Travellers who have not travelled to an international destination**

... have not travelled

42%

38%

... only domestic travel

46%

**Travellers who have travelled to an international destination**

Low frequency traveller  
(1 trip/year)

48%

Medium frequency traveller  
(2 trips/year)

58%

High frequency traveller  
(3 or more trips/year)

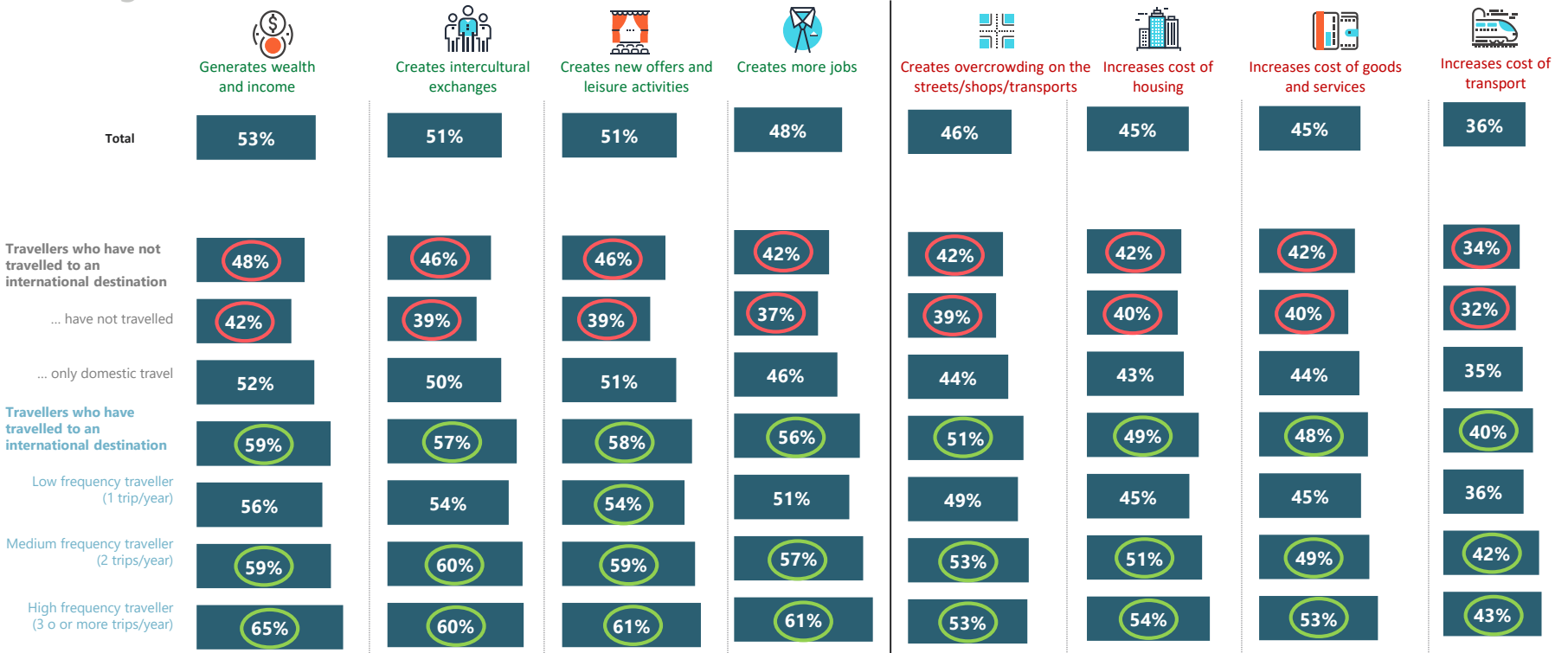
56%

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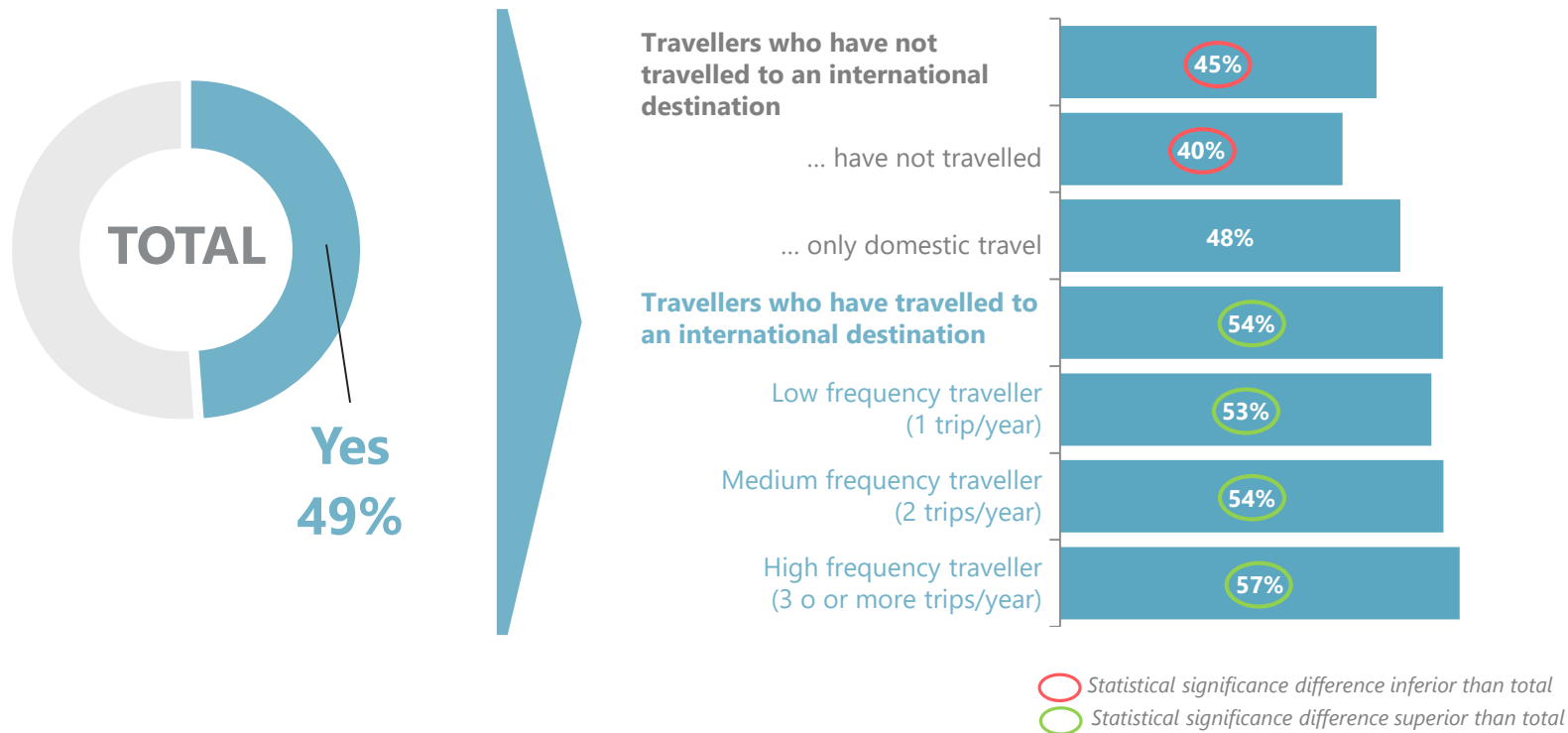
Q2. How does tourism impact your city?

Q5. How many times have you travelled to an international destination during 2018  
(one night minimum)?



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Q3. Do you think there should be measures to manage tourism better in your city?  
Q5. How many times have you travelled to an international destination during 2018  
(one night minimum)?



Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city?

Q5. How many times have you travelled to an international destination during 2018 (one night minimum)?

|                                                                                                                                                                 | Total | Travellers who have not travelled to an international destination | ... have not travelled | ... only domestic travel | Travellers who have travelled to an international destination | Low frequency traveller (1 trip/year) | Medium frequency traveller (2 trips/year) | High frequency traveller (3 or more trips/year) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------------------------------------------------|------------------------|--------------------------|---------------------------------------------------------------|---------------------------------------|-------------------------------------------|-------------------------------------------------|
| Improve infrastructures and facilities                                         | 72%   | 73%                                                               | 71%                    | 74%                      | 72%                                                           | 75%                                   | 69%                                       | 69%                                             |
| Create experiences and attractions that benefit residents as well as visitors  | 71%   | 73%                                                               | 69%                    | 75%                      | 69%                                                           | 73%                                   | 69%                                       | 65%                                             |
| Ensure local communities benefit from tourism                                  | 65%   | 65%                                                               | 62%                    | 67%                      | 65%                                                           | 64%                                   | 67%                                       | 65%                                             |
| Communicate with and engage local communities                                  | 50%   | 53%                                                               | 56%                    | 51%                      | 48%                                                           | 51%                                   | 48%                                       | 44%                                             |
| Communicate with and engage visitors                                           | 48%   | 47%                                                               | 48%                    | 47%                      | 48%                                                           | 50%                                   | 49%                                       | 46%                                             |
| Promote tourism to other type of visitors                                      | 46%   | 44%                                                               | 46%                    | 43%                      | 48%                                                           | 50%                                   | 44%                                       | 48%                                             |
| Promote dispersal visitors all year long                                       | 40%   | 40%                                                               | 42%                    | 39%                      | 40%                                                           | 39%                                   | 41%                                       | 40%                                             |
| Set a System to measure and monitor tourism                                    | 36%   | 36%                                                               | 36%                    | 37%                      | 36%                                                           | 33%                                   | 35%                                       | 39%                                             |
| Promote the dispersal of visitors within the city and beyond                   | 35%   | 35%                                                               | 35%                    | 35%                      | 35%                                                           | 35%                                   | 33%                                       | 37%                                             |
| Limit the number of tourism establishments                                     | 16%   | 14%                                                               | 15%                    | 13%                      | 18%                                                           | 14%                                   | 21%                                       | 20%                                             |
| Limit the number of visitors                                                   | 12%   | 12%                                                               | 14%                    | 11%                      | 12%                                                           | 9%                                    | 14%                                       | 14%                                             |
| Stop tourism promotion                                                        | 9%    | 8%                                                                | 8%                     | 9%                       | 10%                                                           | 6%                                    | 11%                                       | 13%                                             |

 Statistical significance difference inferior than total  
 Statistical significance difference superior than total

# Further information:



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