



---

## Resident Sentiment Survey

October 2019

## Background

Goal is in-depth information about attitudes of residents toward tourism and reasons for those attitudes

- Gather information on attitudes
- Both Asheville and Buncombe County residents
- Quantify the levels and strength of various attitudes
- Measure awareness of Tourism Development Authority and Explore Asheville
- Identify issues to inform the Tourism Management and Investment Plan

# Methodology

- Based on national survey work on this topic
- Designed to evaluate both positive and negative perceptions about tourism in the community

Two different audiences included:

- Data representative of the population of the city and county – 468 surveys – accurate at +/-4.5% at a 95% confidence level
- Wide participation and input from the public – Opt-In sample of 2,200. Cannot provide an accuracy estimate as this is not a representative sample

\* Survey responses were evaluated to reduce duplicates

# Respondent Profile

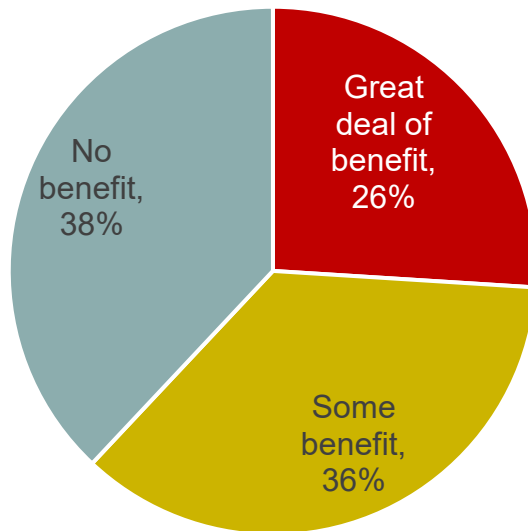


Demographics	Random	Opt-In	Employed- great deal of benefit	Employed – some benefit
Married or in a committed relationship	57%	76%	44%	60%
Average Age	42	53	44	45
College or Graduate Degree	50%	88%	47%	56%
Less than \$50,000	50%	19%	55%	52%
\$50,000 but less than \$100,000	36%	38%	28%	35%
More than \$100,000	14%	44%	18%	14%

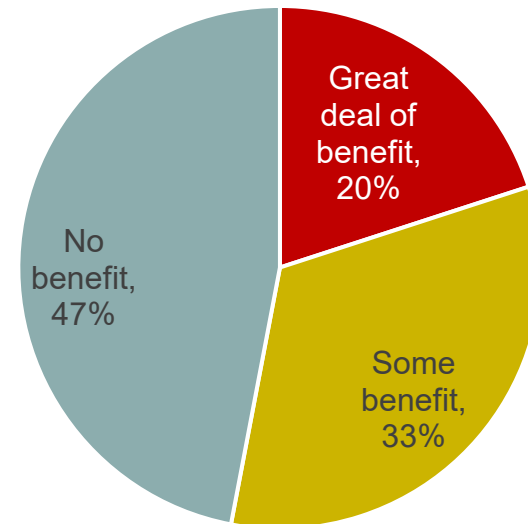


# Respondent Profile

Random



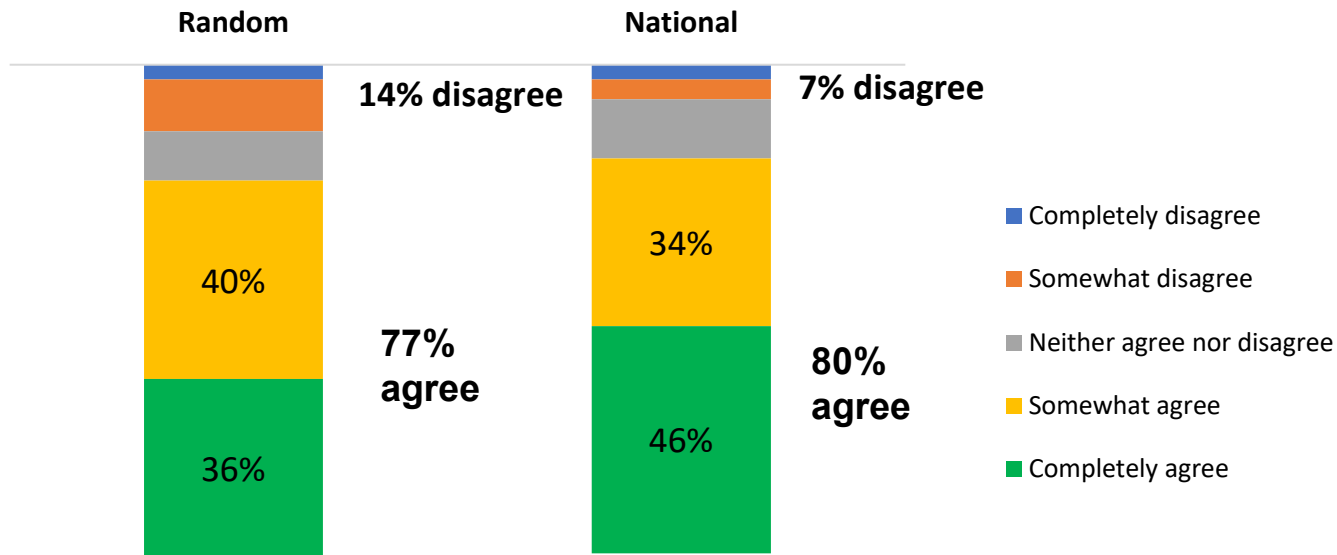
Opt-In



- Are you employed...?
  - At a place that receives a great deal of benefit from visitors to the area
  - At a place that receives some benefit from visitors to the area
  - A place that receives no benefit from visitors to the area

# Is Tourism Good for the Community?

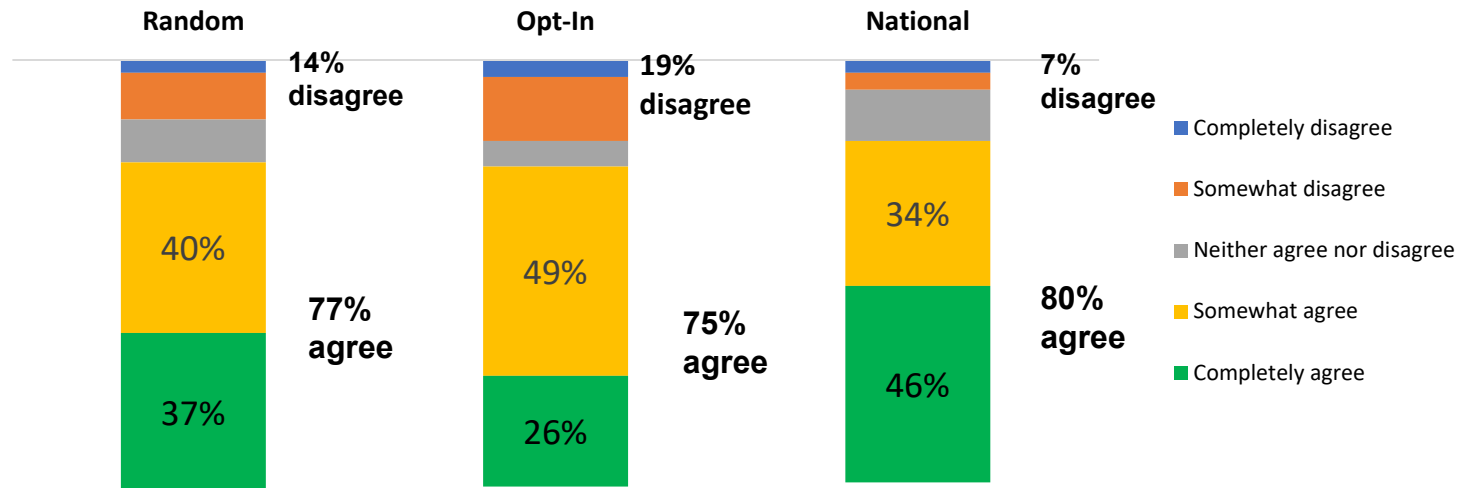
## Tourism is Good for the Community



Q: Overall, how much do you agree that tourism is good for your **community**?

# Is Tourism Good for the Community?

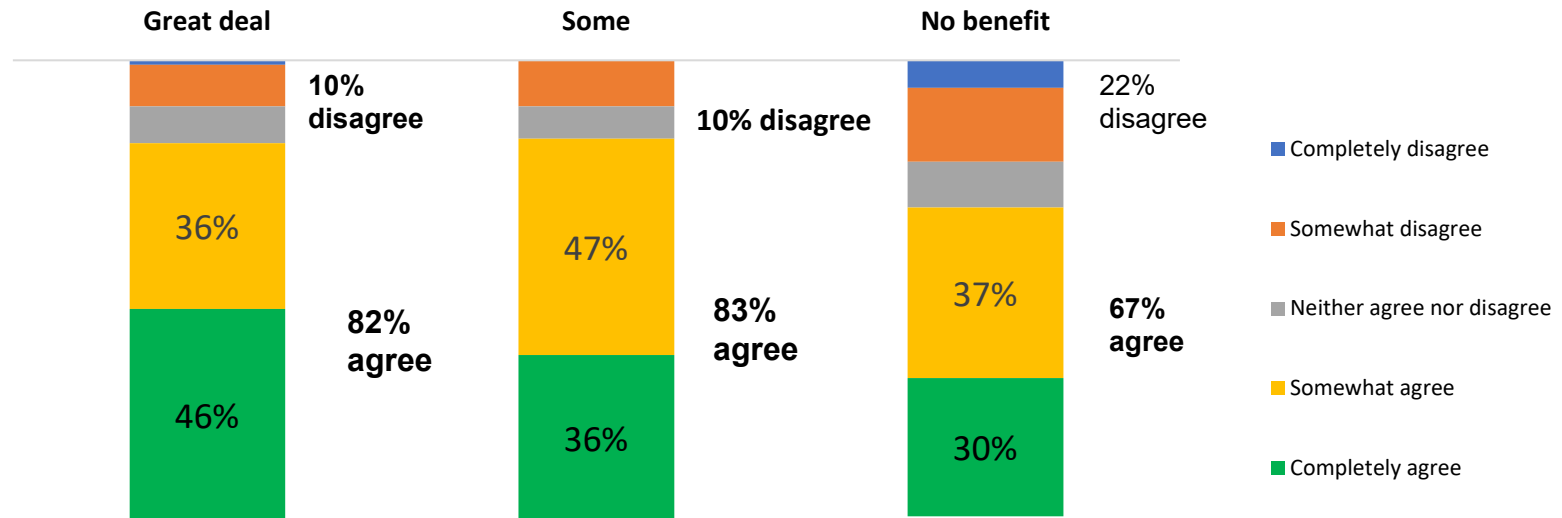
## Tourism is Good for the Community



Q: Overall, how much do you agree that tourism is good for your **community**?

# Is Tourism Good for the Community?

## Tourism is Good for the Community



- Being employed by a business that receives benefit from tourism has a positive impact

Q: Overall, how much do you agree that tourism is good for your **community**?



## Positive Perceptions – 80% Agree Random Sample

- ***Tourism helps small businesses*** in my community
- Money from people who visit ***supports independent businesses***
- There are ***more restaurants and a greater variety of independently owned restaurants*** because of people visiting the area
- Because of tourism in the area, Asheville has been ***able to attract more airline options and flights***
- There are ***more independently owned retail shops and a greater variety of retail shops*** because of people visiting the area
- There are ***more festivals and events*** because of people visiting the area

## Positive Perceptions – 80% Agree Opt-In Sample

- ***Tourism helps small businesses*** in my community
- Money from people who visit ***supports independent businesses***
- There are ***more restaurants and a greater variety of independently owned restaurants*** because of people visiting the area
- Because of tourism in the area, Asheville has been ***able to attract more airline options and flights***

## Negative Perceptions – 80% Agree Random Sample

- There are ***problems with parking*** because of people visiting the community
- Because we have too many people visiting the area, we have ***traffic problems***
- The ***cost of housing is too high*** in the area because of people visiting the community

## Negative Perceptions – 80% Agree Opt-In Sample

- There are ***problems with parking*** because of people visiting the community
- Because we have too many people visiting the area, we have ***traffic problems***
  
- ***But opt-in sample tended to attribute more negative impacts on the community to tourism***

# Residents agree that tourism builds awareness for the community Random Sample

Over 80% agree:

Tourism shows people that my community is

- A good place to relocate
- A good place to retire
- A good place to move their business or start a new business

## Opt-In sample agrees that tourism builds awareness for the community

Over 80% agree:

- Tourism shows people that my community is a good place to relocate
  - A good place to retire

70% agree

- A good place to move their business or start a new business

# A smaller majority of residents agree

## Random Sample

	Random	Opt-In
The tax revenue my community receives from people visiting has gone to build amenities that make this a better place to live	60%	36%
The tax revenue my community receives from people visiting has gone to support important community services	54%	27%

## But a smaller majority also agree that...

My tax dollars are being spent to provide services to visitors rather than spending them on things that are good for residents

**Random    Opt-In**

62%    75%

People visiting the area are a drain on city and county resources

52%    73%

## A minority of people agree..

The tax revenue my community receives from people visiting reduces the amount of taxes I pay

**Random    Opt-In**

41%    17%

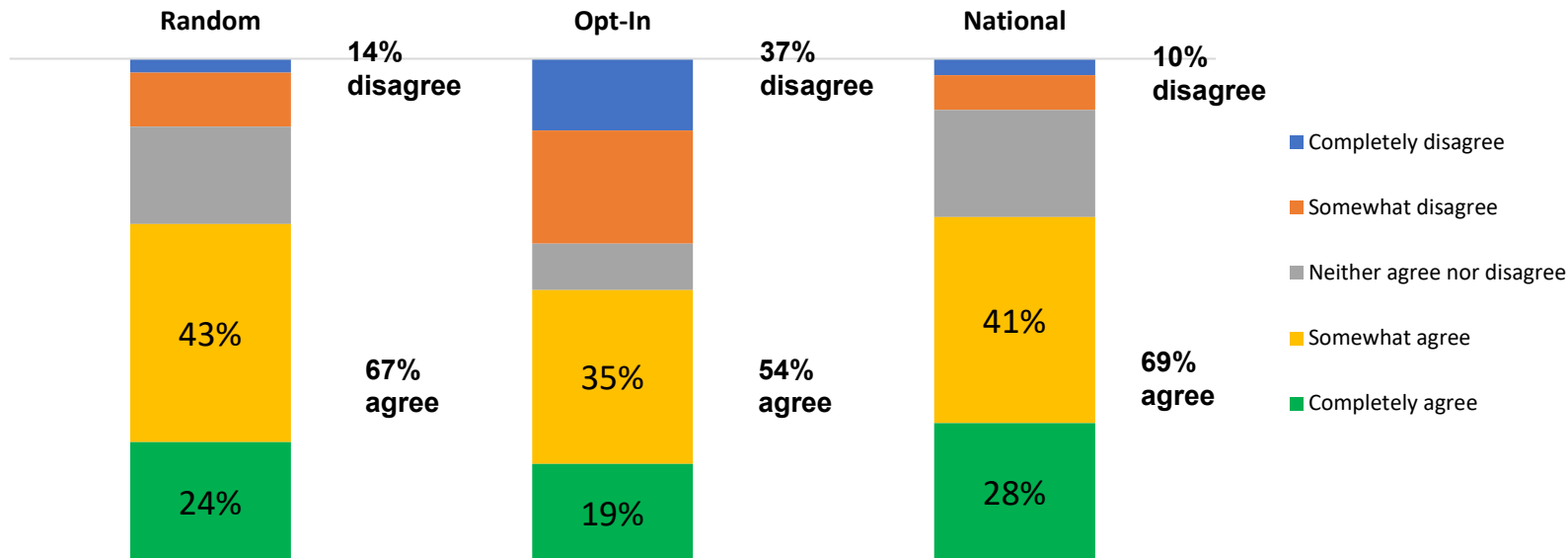


## Current Situation

- Majority of residents believe that tourism is good for the community
- They agree that there are many benefits that tourism brings to the community
- But they also attribute some of the problems in the community to the impact of tourism
  
- How do they feel about tourism promotion efforts?
- What do they know about what the Tourism Development Authority and Explore Asheville?

# Is Tax-Funded Tourism Promotion Good for the Community?

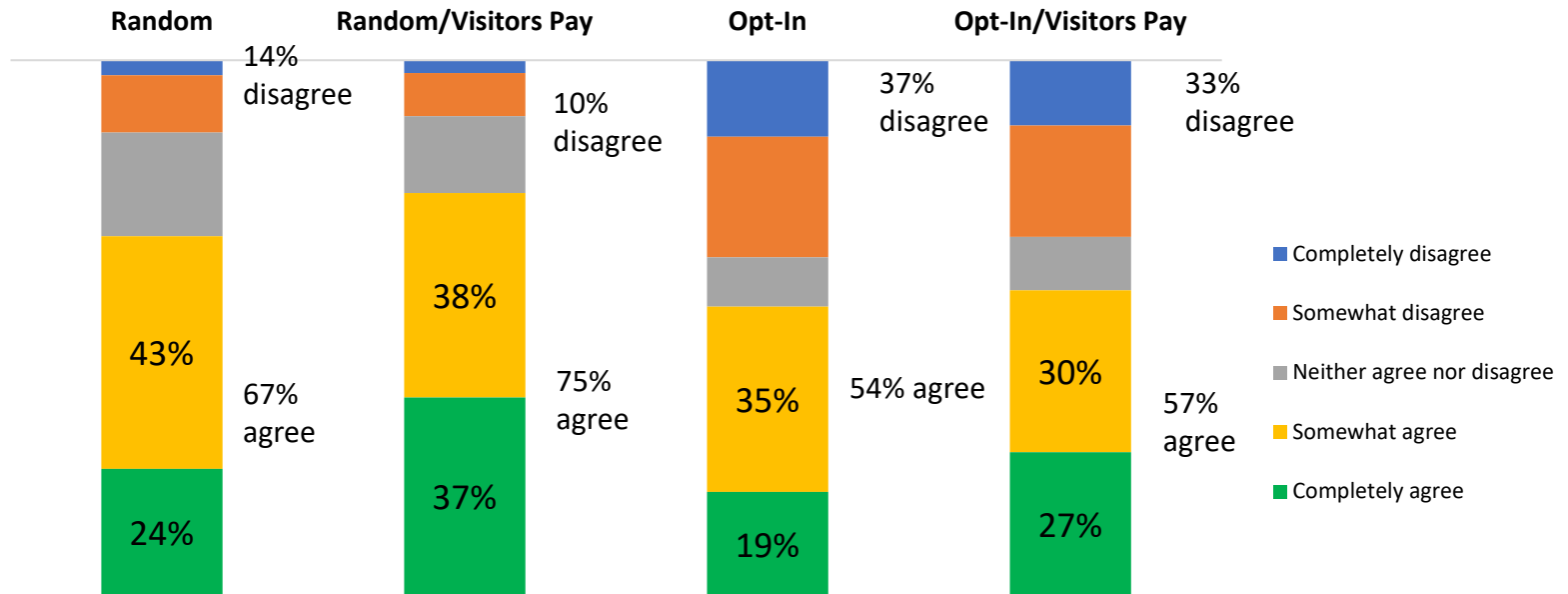
## Tax-Funded Tourism Promotion is Good for the Community



Nearly every state and many cities and other communities promote themselves to attract visitors and their spending to the area. Overall, how much do you agree that tax-funded tourism promotion is good for your community?

# Knowing the money is paid by visitors, is Tax-Funded Tourism Promotion Good for the Community?

Tax-Funded Tourism Promotion is Good for the Community



In Buncombe County the money to promote tourism comes from a lodging tax paid by overnight visitors, so it is generally paid by the people visiting the **community**. Knowing the money is paid by the visitors, how much do you agree that tax-funded tourism promotion is good for your **community**?

# Most residents agree that the role of Explore Asheville includes:

Role of Explore Asheville	Random	Opt-In
Attracting people to visit and spend money with local businesses	60%	67%
Attracting vacation travelers	59%	64%
Attracting people to visit and generate tax revenue	57%	59%
Operating welcome/visitor centers	54%	60%
Marketing the community as a tourism destination	53%	67%

As you understand it, what are the primary responsibilities of your community tourism office?

# Fewer residents see the role of Explore Asheville to include:

Role of Explore Asheville	Random	Opt-In
Attracting people to visit and support jobs	46%	41%
Attracting international travelers	36%	36%
Bringing conventions to the community	32%	42%
Bringing national events to the community	32%	35%
Attracting businesses to start in/relocate to the community	31%	25%
Educating tourism businesspeople in the community	28%	32%
Providing research and intelligence to community's travel industry	27%	39%

As you understand it, what are the primary responsibilities of your community tourism office?

# Few residents agree that the role of Explore Asheville includes:

Role of Explore Asheville	Random	Opt-In
Providing funds for development of new community facilities and services that serve both residents and visitors	25%	39%
Addressing infrastructure issues in the community related to tourism	24%	42%
Providing free co-operative advertising/marketing opportunities to tourism businesses	24%	30%
Attracting film companies to make films in the community	24%	25%
Providing free marketing to connect local businesses to customers	22%	27%
Financially supporting non-profit events and attractions in the community	22%	26%
Community beautification efforts	21%	29%
Regulating the hospitality industry	21%	18%
Paying for things like police and safety services	16%	18%

As you understand it, what are the primary responsibilities of your community tourism office?

# Most are not aware of past use of occupancy tax dollars for capital projects

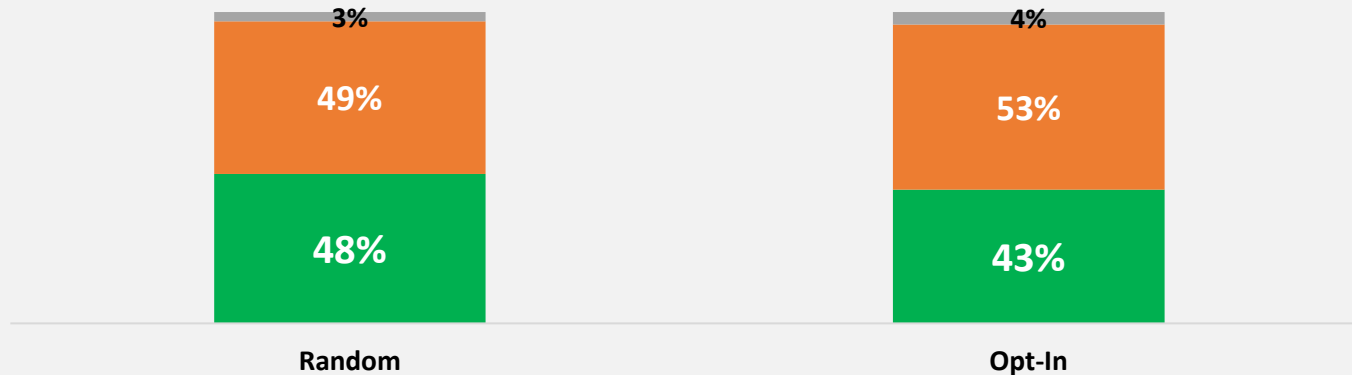
	Random	Opt-In
None of these	41%	31%
US Cellular Center	32%	45%
NC Arboretum	29%	33%
Pack Square Park	27%	36%
Asheville Art Museum	26%	43%
Asheville Riverfront Redevelopment	25%	43%
Asheville Community Theater	20%	24%
WNC Farmers Market	19%	17%
Diana Wortham Theatre	18%	36%
LEAF Global Arts Center	13%	25%
YMI Cultural Center	10%	24%
Black Mountain College Museum and Arts Center	10%	21%
African American Heritage Museum and Trail	9%	16%
Woodfin Greenway & Blueway	7%	25%
Center for Craft	6%	19%
Enka Recreation Destination	6%	14%

The Buncombe County Tourism Development Authority currently provides part of its funding for projects in the **community**. Since 2009 BCTDA has awarded \$44 million to fund 39 capital projects, and here are some of the more recently funded efforts.

Please indicate which of these you knew received financial support from the Tourism Product Development Fund.

# Knowledge has positive impact

Impact of Knowledge of Investments



- Make you feel more negative about Buncombe Tourism Development Authority
- Does not change your opinion
- Make you feel more positive about the Buncombe Tourism Development Authority

Does knowing about this funding...?



# Most residents agree with the positive impact of promoting tourism

	Random	Opt-In
The money my community invests in tourism promotion fuels the local economy	82%	71%
I think it is a good use of lodging tax money to promote tourism	75%	48%
Visitors will continue to come to my community even if we stopped all tourism advertising	73%	75%
It's important to promote tourism so that Asheville and Buncombe County don't lose out to other competitive destinations	70%	50%
The taxes visitors pay cover the cost for any marketing done by my community	66%	66%
My community's tourism office spends money responsibly	66%	37%

## While not a majority, some residents agree with statements that support less tourism promotion

	Random	Opt-In
When the community spends money to promote tourism, it is only helping businesses that should be doing their own marketing	46%	47%
Using tax dollars to promote tourism is wasteful	45%	57%
My community should stop spending money to promote tourism and bring visitors to the area	39%	54%

# TOURISM MANAGEMENT & INVESTMENT PLAN

# Top Tier of Issues for Inclusion:

Issue	Random
Parking	61%
Housing affordability	59%
City cleanliness	50%
Homelessness/transients/panhandling	46%
Better sidewalks/making city more walkable	44%
Impact of tourism on neighborhoods	44%
Supporting local small businesses	43%
Transportation – buses, trolley, shuttles, etc.	42%
Public safety and policing issues	41%

Buncombe County Tourism Development Authority (the local tourism promotion agency) is currently developing a tourism management and investment plan to guide future efforts. Which of the following topics do you believe should be addressed in this plan?

## Next Tier of Issues for Inclusion:

Issue	Random
Workforce affordability	37%
Walking trails or bike paths	35%
Support for arts and culture	32%
Maintaining parks and sports venues	27%
Tourism marketing for specific slow seasons	24%
Tourism marketing for the area	23%
Developing or renovating new tourist districts/areas	21%

Buncombe County Tourism Development Authority (the local tourism promotion agency) is currently developing a tourism management and investment plan to guide future efforts. Which of the following topics do you believe should be addressed in this plan?

## Bottom Tier of Issues:

Issue	Random
Developing or renovating additional arts businesses and events	18%
Developing new sports facilities and entertainment facilities	15%
More and different retail	14%
Signage	14%
More and different restaurants	13%
Developing or renovating additional sports venues or facilities	12%
Providing signage in the community	11%
Other	5%

Buncombe County Tourism Development Authority (the local tourism promotion agency) is currently developing a tourism management and investment plan to guide future efforts. Which of the following topics do you believe should be addressed in this plan?

## Topics to be Addressed in TMIP:

### Top Concerns among opt-in:

- Better sidewalks/walkability
- Transportation
- Parking

Issue	Random	Opt-In
Better sidewalks/making city more walkable	44%	66%
Transportation – buses, trolley, shuttles, etc.	42%	64%
Parking	61%	62%
Walking trails or bike paths	36%	55%
City cleanliness	50%	54%
Housing affordability	60%	53%
Impact of tourism on neighborhoods	43%	53%
Support for arts and culture	32%	51%

Buncombe County Tourism Development Authority (the local tourism promotion agency) is currently developing a tourism management and investment plan to guide future efforts. Which of the following topics do you believe should be addressed in this plan?

## Current Situation

- Majority of residents believe that tourism is good for the community
- They agree that there are many benefits that tourism brings to the community
- But they also attribute some of the problems in the community to the impact of tourism
  
- Knowledge of the TDA and Explore Asheville is fairly limited, and few are familiar with the facilities supported by the occupancy tax
- Increasing awareness has a positive impact
- There are a wide variety of issues that residents would like to see addressed in the TMIP