



Resident Sentiment Survey Report

October 2019

Background

Asheville and Buncombe County are currently developing a long-term plan for tourism in the area (the Tourism Management & Investment Plan). There are many facets to the project, but one important element is to gather more detailed information about the attitudes of residents toward tourism, its impact on the community, and the efforts to promote and develop the tourism industry in the area.

- A key element of this plan is to understand the attitudes of area residents regarding tourism in the community. The goal of this research is to provide in-depth information about the attitudes of residents and to explore reasons for those various attitudes. The goals of the research are to:
 - Gather information on attitudes relating to tourism from residents of Buncombe County and the City of Asheville;
 - Allow broad-based input from residents of both Asheville and Buncombe County;
 - Identify issues that impact these attitudes, including participation in the industry, knowledge, personal circumstances, and other factors;
 - Quantify the levels and strength of various attitudes across both the county and the city; and
 - Provide an overview of the current situation and resident input with conclusions and recommendations.

Methodology

Strategic Marketing & Research Insights (SMARInsights) was chosen to conduct this research. SMARInsights has conducted national research on resident attitudes and brings that expertise to the process. Comparisons with the national results can provide context in considering the Asheville/Buncombe County findings and are provided where appropriate.

With this type of research, there are two key and inter-related goals:

- To gather information that is representative of the population of the areas (city and county)
- To allow wide participation and input from the public.

To gather information that is representative, SMARInsights worked with national sample vendors to survey a mix of residents from the city of Asheville and the rest of Buncombe County. This is referred to as the “Random” sample. A total of 468 surveys were completed for this phase of the research, with 189 in the city of Asheville and 279 in the remainder of Buncombe County. These results have an accuracy of +/-4.5% at a 95% confidence level. The report focuses mainly on the representative sample.

To allow participation and input from the public, survey links were provided and promoted in various ways to encourage participation. This was extremely successful, and more than 2,200 people responded. This sample is referred to as the “Opt-In” sample, and key results are in the main body of the report, with more detailed findings in the Appendix.

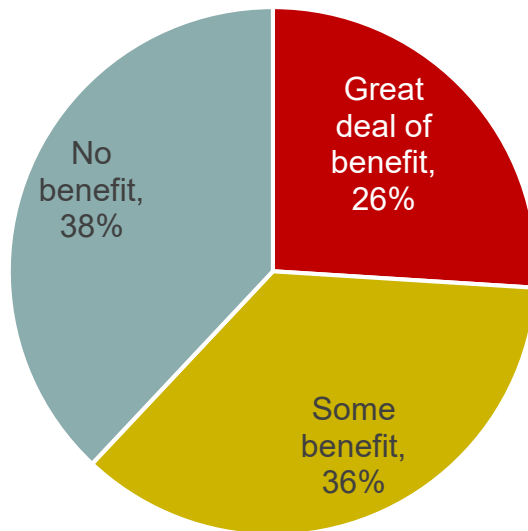
In cleaning the data, SMARInsights used the machine IDs of those completing the survey along with demographic data to remove duplicate surveys. For example, if the machine ID was the same, and so was the age and gender, the duplicate survey was removed. But in other cases if there was a similar machine ID but different demographic information the assumption was that multiple people had taken the survey using the same computer and these were included in the results.

Respondent Profile

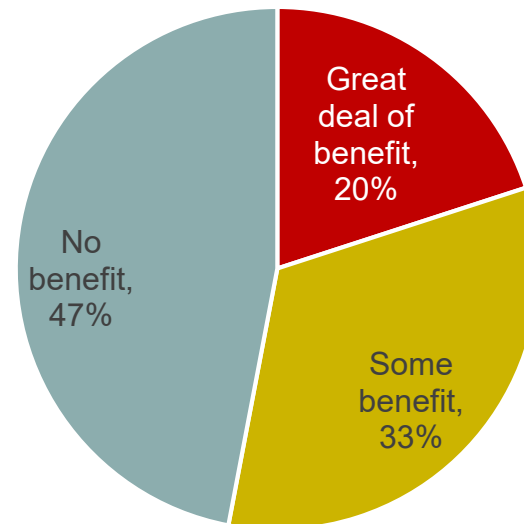
Demographics	Random	Opt-In	Employed- great deal of benefit	Employed – some benefit
Married or in a committed relationship	57%	76%	44%	60%
Divorced/separated	12%	9%	19%	9%
Widowed	3%	4%	1%	2%
Single/never married	28%	12%	36%	29%
Average Age	41.8	52.9	44.3	45.3
High school or less	23%	1%	26%	19%
Some college/technical school	28%	11%	28%	28%
College graduate	35%	43%	33%	40%
Post-graduate degree	15%	45%	14%	16%
Less than \$35,000	30%	8%	29%	27%
\$35,000 but less than \$50,000	20%	11%	26%	25%
\$50,000 but less than \$75,000	21%	19%	18%	23%
\$75,000 but less than \$100,000	15%	19%	10%	12%
\$100,000 but less than \$150,000	8%	23%	10%	11%
\$150,000 but less than \$250,000	4%	14%	3%	2%
More than \$250,000	2%	7%	5%	1%

Respondent Profile

Random



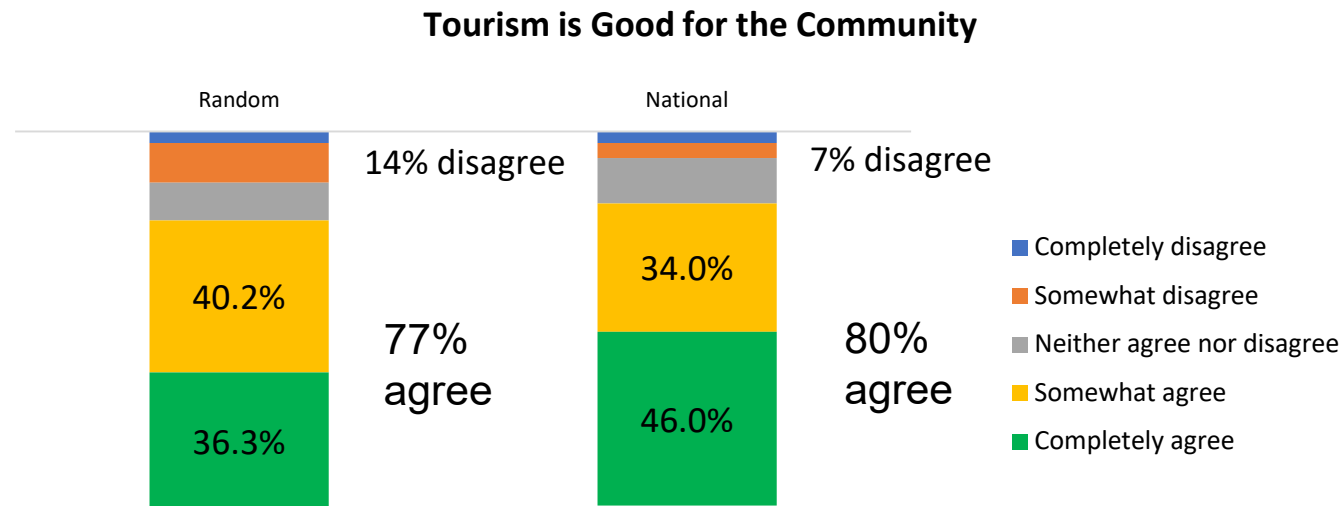
Opt-In



- The Random sample includes a larger percentage of respondents employed at businesses that receive benefit from tourism.

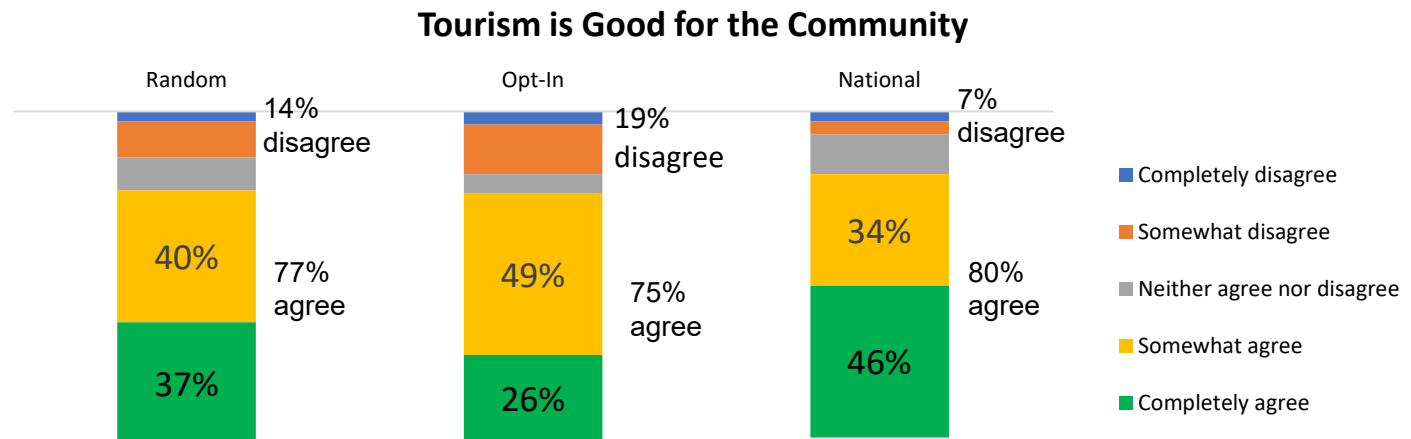
Is Tourism Good for the Community?

- The survey starts by asking participants to indicate how much they agree with the statement that “tourism is good for the community.”
- Generally, there is agreement with the statement – and the percentage that agree is similar to national results, while the percentage that disagrees is larger.



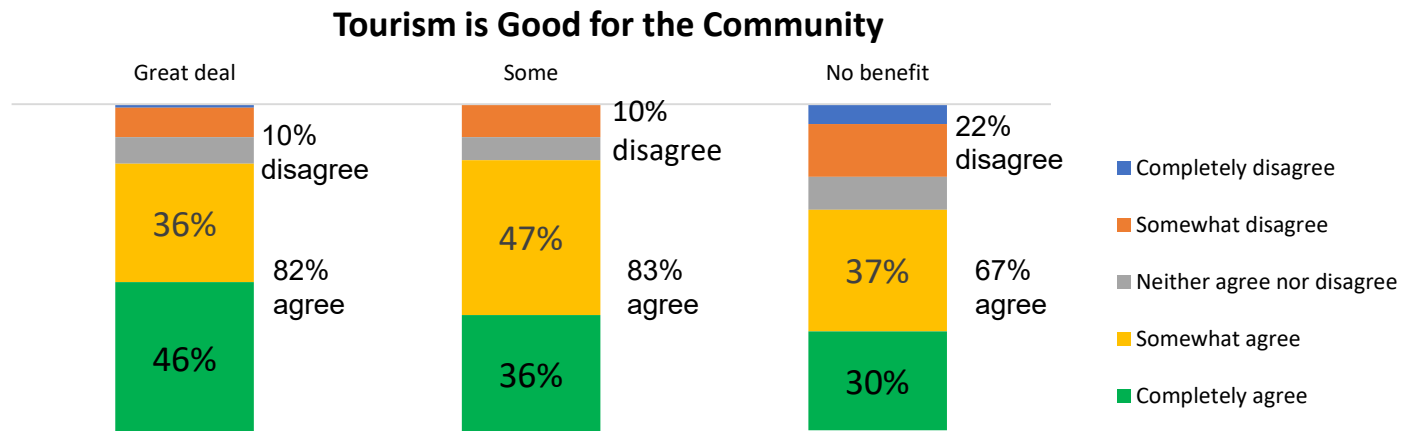
Is Tourism Good for the Community?

- Generally, there is strong agreement that tourism is good for the community, with 77% of the Random sample and 75% of the Opt-in sample agreeing with this statement.
- The Random sample is more likely to strongly agree with the statement.



Is Tourism Good for the Community?

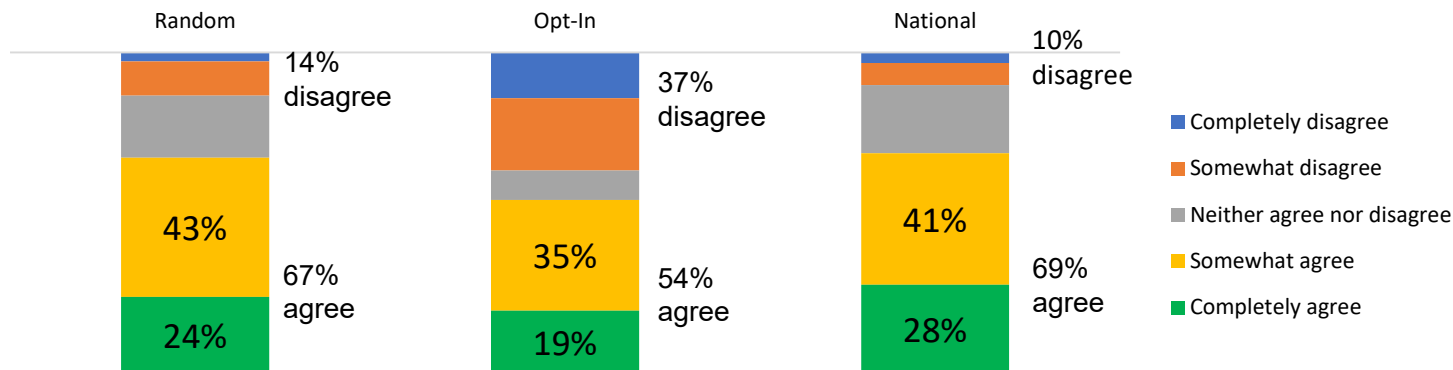
- Being employed by a business that receives benefit from tourism has a positive impact:
 - 82% of those employed at a business that receives a great deal of benefit agree
 - 83% of those employed at a business that receives some benefit agree – although fewer strongly agree
 - 67% of those employed at a business that receives no benefit agree



Is Tax-Funded Tourism Promotion Good for the Community?

- The next question asked respondents how much they agree that tax-funded tourism promotion is good for the community.
- Nationally, 69% of the people agree that tax-funded tourism promotion is good for the community, and the similar sample in Asheville reports similar levels of support – 67%. Among the Opt-In sample, 54% agree with the statement.
- As will become clear later in the report, many residents don't know how the money is actually used, and more information positively impacts their reactions to this statement.

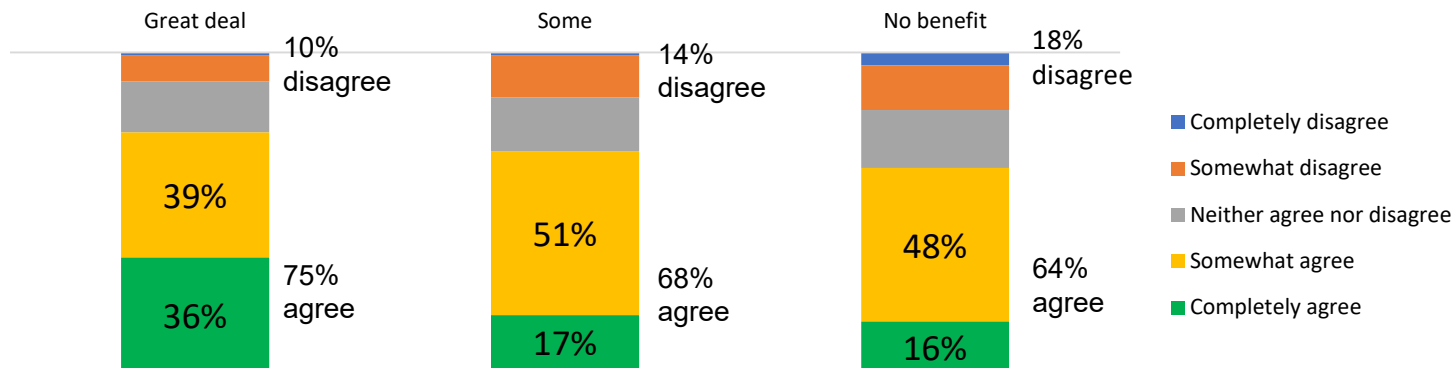
Tax-Funded Tourism Promotion is Good for the Community



Is Tax-Funded Tourism Promotion Good for the Community?

- Being employed by a business that receives benefit from tourism again spurs greater agreement with the statement that tax-funded tourism promotion is good for the community.
- But even among those employed at a business that receives no benefit, 64% agree that tourism promotion is good for the community.

Tax-Funded Tourism Promotion is Good for the Community



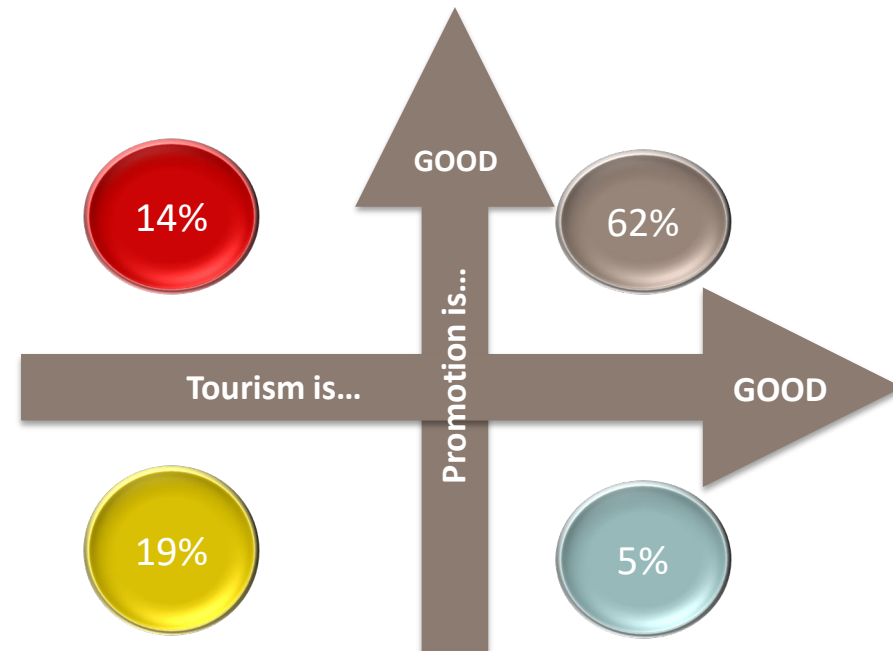
Buncombe County – Random Sample

(based on initial 2 questions)

One way to consider the results is to classify people based on their responses to the statements:

- Tourism is good for the community
- Tax-funded tourism promotion is good for your community

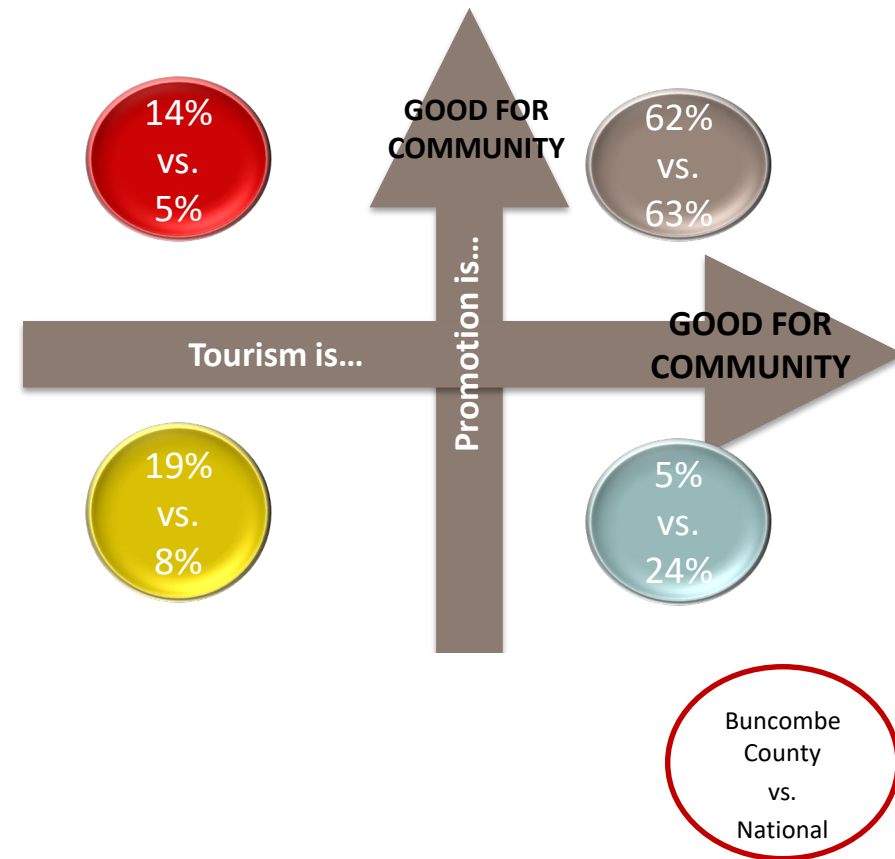
This provides a way to classify residents and understand the size of the various audiences. This shows that overall 62% of the residents agree that both tourism and tax-funded tourism promotion is good, and 19% disagree with both these statements. There are 5% who agree tourism is good for the community but disagree that tax-funded tourism promotion is positive and 14% who agree that tax-funded promotion is good for the community but don't agree that tourism is good for the community.



Comparison of Random Sample to National Results

(based on initial 2 questions)

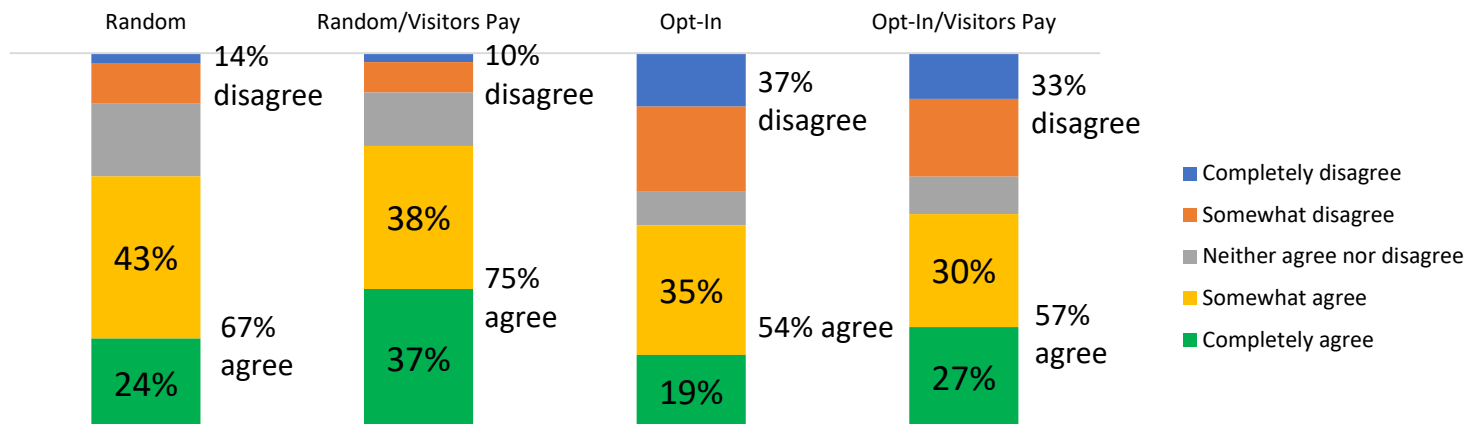
- By combining the answers to the two questions (tourism is good for the community and tax-funded tourism promotion is good for the community) the responses can be classified into four groups and compared to the national results:
- Comparison to national results highlights that the segment that agrees that both tourism and tourism promotion benefit the community is similar in Buncombe County to national results – 62% for Buncombe County and 63% in the national study.
- There are 19% of the respondents in Buncombe County that disagree with both statements, compared to 8% in the national study.
- The percentage that agree that tourism is good for the community but not tax-funded tourism promotion is 5% in Buncombe County and 24% nationally
- The percentage that agree that tax-funded promotion is good but disagree that tourism is good for the community is 14% in Buncombe County and 5% nationally.



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

- When respondents are told that the tax is paid by visitors, that has a significant positive impact among the Random sample, but much less impact among the Opt-in sample, although more do completely agree.

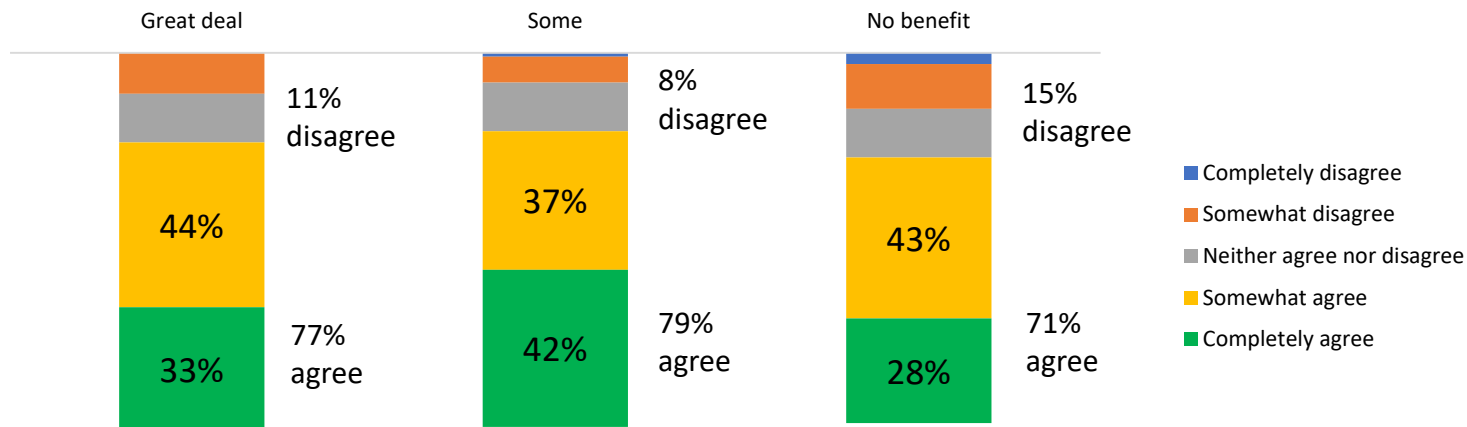
Tax-Funded Tourism Promotion is Good for the Community



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

- When the question notes that the taxes are paid by visitors, more than 70% of all respondents agree that tax-funded tourism promotion is good for the community. Those who are employed at businesses that receive benefits from tourism are more likely to agree.

Tax-Funded Tourism Promotion is Good for the Community

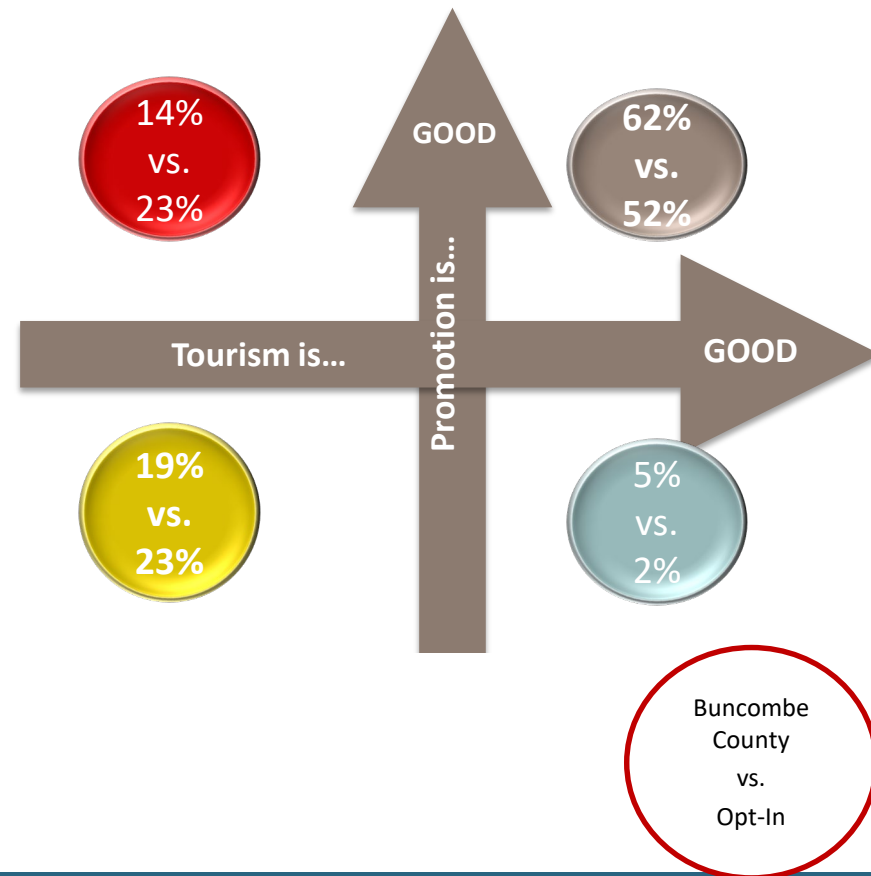


Comparison between Buncombe County samples (Random vs. Opt-in)

(based on initial 2 questions)

A comparison between the Buncombe County samples highlights that the Opt-in sample is different from residents overall:

- The percentage of those who agree with both statements is 52% compared to 62% among the Random sample.
- The percentage that agrees promotion is good but not tourism is 23% compared to 14%.
- The percentage that disagree with both statements is 23% vs. 19% among Random sample.
- The Opt-in sample includes fewer people who are employed at businesses that receive benefits from tourism, which is part of the reason that this audience is less likely to agree with the positive aspects of tourism.



Exploring Attitudes

Consumers were presented with a series of 42 statements about tourism and tourism promotion to explore their perceptions. They included an equal mix of positive and negative statements to help uncover specific attitudes and feelings about tourism and tourism promotion.

- Evaluating this large number of statements is challenging, so statistical analysis was used to group the statements into categories. The following five categories were identified:
 - Economic Factors
 - Quality of Life
 - Taxes
 - Promotion
 - Non-Tourism impact
- A review of these results among the Random sample provides an overview of the perceptions of residents in Buncombe County.
- Respondents evaluated the statements using a 5-point scale where they could strongly agree, somewhat agree, somewhat disagree, strongly disagree or answer “don’t know.”
- The following shows the top two boxes (people who strongly or somewhat agree) with each statement.

Attitudes toward economic impact of tourism.

Positive – ECONOMIC

RANDOM	Total	Asheville	Rest of Buncombe
Tourism helps small businesses in my community	88%	89%	88%
Money from people who visit supports independent businesses	87%	88%	85%
Tourism supports jobs that people in my community need	79%	79%	78%
Tourism generates a positive ROI (return on investment for my community)	74%	78%	70%
Tourism jobs provide a good starting point and lead to career opportunities	68%	63%	72%
Tourism supports well-paying jobs in my community	52%	52%	53%

Negative – ECONOMIC

RANDOM	Total	Asheville	Rest of Buncombe
The cost of housing is too high in the area because of people visiting the community	85%	84%	85%
There is more homelessness and panhandling in the community because of tourism	64%	64%	63%
Wages in the area are lower because of the impact of tourism and tourist related jobs	63%	61%	64%
People offering their homes as rental properties for visitors has had a negative impact on my neighborhood	45%	40%	48%
Tourism only helps the large businesses in my community	41%	41%	40%

Random Sample N=468

- This factor clearly exhibits that residents see economic benefit from tourism.
- They agree it helps small and independent businesses, supports jobs in the community, and generates a positive return on investment for the community.
- But they also attribute some community challenges to tourism – including higher housing costs, more homelessness and panhandling, and lower wages.

Attitudes toward tourism and quality of life.

Positive – QUALITY OF LIFE

RANDOM	Total	Asheville	Rest of Buncombe
There are more restaurants and a greater variety of independently owned restaurants because of people visiting the area	88%	91%	86%
Because of the tourism in the area, Asheville has been able to attract more airline options and flights	89%	91%	88%
There are more independently owned retail shops and a greater variety of retail shops because of people visiting the area	81%	85%	79%
There are more festivals and events because of people visiting the area	80%	84%	77%
There are lots of things to do in the community that are here because of people visiting	76%	81%	71%
Money from people who visit supports businesses that add to my enjoyment of Buncombe County	75%	79%	71%
Tourism makes my community a nicer place to live	56%	60%	52%

Negative – QUALITY OF LIFE

RANDOM	Total	Asheville	Rest of Buncombe
There are problems with parking because of people visiting the community	88%	84%	90%
Because we have too many people visiting the area, we have traffic problems	85%	82%	87%
The area feels crowded and I can't enjoy my city/county as much because there are so many people visiting	72%	63%	78%
Locals can't enjoy my community because of all the people visiting	63%	60%	65%
The number of people visiting the area has a negative impact on the quality of life in the area	59%	58%	59%
The city is not as clean as it should be because there are too many visitors	57%	51%	60%

- Residents agree that there are many positive aspects to their quality of life that result from tourism, including more and a greater variety of independently owned restaurants and retail shops, more airline options and flights, more festivals and events, and many things to do.
- At the same time, they attribute challenges with parking, traffic and crowding to the level of tourism in the community.

Residents agree that tourism builds awareness for the community.

OTHER ECONOMIC DEVELOPMENT			
RANDOM	Total	Asheville	Rest of Buncombe
Tourism shows people that my community is a good place to relocate	86%	83%	88%
Tourism shows people that my community is a good place to retire	86%	85%	86%
Tourism shows people that my community is a good place to move their business, or start a new business	84%	85%	83%

Random Sample N=468

- Residents agree that tourism builds awareness of the community as a place to relocate, retire and do business.

Residents do not associate benefits of tourism with the taxes visitors pay.

Positive – TAXES

RANDOM	Total	Asheville	Rest of Buncombe
The tax revenue my community receives from people visiting has gone to build amenities that make this a better place to live	60%	62%	58%
The tax revenue my community receives from people visiting has gone to support important community services	54%	51%	56%
The tax revenue my community receives from people visiting reduces the amount of taxes I pay	41%	45%	39%

Negative – TAXES

RANDOM	Total	Asheville	Rest of Buncombe
My tax dollars are being spent to provide services to visitors rather than spending them on things that are good for residents	62%	61%	62%
People visiting the area are a drain on city and county resources	52%	49%	54%

Random Sample N=468

- The majority of people don't agree that the tax revenue from tourism reduces their taxes. The majority do agree that the revenue has gone to build amenities that make the county a better place to live.
- As will be shown later in the report, few are aware of the many facilities that have received financial support from tourism funds.
- Many people agree that tax dollars are spent to provide services to visitors rather than supporting the needs of residents and that people visiting are a drain on city and county resources.

Residents have low awareness of how the tax works and how it is used.

Positive – MARKETING

RANDOM	Total	Asheville	Rest of Buncombe
The money my community invests in tourism promotion fuels the local economy	82%	84%	80%
I think it is a good use of lodging tax money to promote tourism	75%	73%	76%
It's important to promote tourism so that Asheville and Buncombe County don't lose out to other competitive destinations	70%	72%	68%
The taxes visitors pay cover the cost for any marketing done by my community	66%	70%	63%
My community's tourism office spends money responsibly	66%	64%	66%

Negative – MARKETING

RANDOM	Total	Asheville	Rest of Buncombe
Visitors will continue to come to my community even if we stopped all tourism advertising	73%	71%	75%
When the community spends money to promote tourism, it is only helping businesses that should be doing their own marketing	46%	47%	46%
Using tax dollars to promote tourism is wasteful	45%	40%	48%
My community should stop spending money to promote tourism and bring visitors to the area	39%	35%	42%
My community's advertising does not bring additional visitors to my area	19%	16%	21%

Random Sample N=468

- More than 80% of the residents agree that the money invested in tourism promotion fuels the local economy.
- There is also strong agreement that tourism promotion is necessary and a good use of the lodging tax money.
- Two-thirds of the residents agree that the tourism office spends money responsibly.
- Most agree that visitors will come even if advertising stopped, but less than 40% agree that the community should stop spending money to promote tourism and bring visitors to the area.
- Less than 1 in 5 agree that the community advertising does not bring in additional visitors.

Current situation

- With the Random sample, the data suggest that for many, their knowledge surrounding visitors and promotion is broad but not deep.
- They understand that having visitors supports services and amenities in the community, and this is positive.
- At the same time, they attribute some community challenges – parking, traffic, housing costs – to the impact of visitors.
- They clearly agree that the money invested in tourism promotion fuels the economy, and that it is important to promote tourism so that the county doesn't lose out to competitive destinations.

ROLE OF EXPLORE ASHEVILLE

Role of Explore Asheville

Role of Explore Asheville	Random
Attracting people to visit and spend money with local businesses	60%
Attracting vacation travelers	59%
Attracting people to visit and generate tax revenue	57%
Operating welcome/visitor centers	54%
Marketing the community as a tourism destination	53%
Attracting people to visit and support jobs	46%
Attracting international travelers	36%
Bringing conventions to the community	32%
Bringing national events to the community	32%
Attracting businesses to start in/relocate to the community	31%
Educating tourism businesspeople in the community	28%
Providing research and intelligence to community's travel industry	27%
Providing funds for development of new community facilities and services that serve both residents and visitors	25%
Addressing infrastructure issues in the community related to tourism	24%
Providing free co-operative advertising/marketing opportunities to tourism businesses	24%
Attracting film companies to make films in the community	24%
Financially supporting non-profit events and attractions in the community	22%
Providing free marketing to connect local businesses to customers	22%
Community beautification efforts	21%
Regulating the hospitality industry	21%
Paying for things like police and safety services	16%
Don't know	13%

- The general public firmly sees the role of Explore Asheville as marketing the community. And they make the link between attracting visitors and increased tax revenue and jobs in the area.
- Only a quarter of the residents agree the role includes funding community facilities or addressing infrastructure issues. And few agree that Explore Asheville should pay for things like police and safety services.

Role of Explore Asheville

Role of Explore Asheville	Random	Opt-In	Difference
Attracting people to visit and spend money with local businesses	60%	67%	7%
Marketing the community as a tourism destination	53%	67%	14%
Attracting vacation travelers	59%	64%	5%
Operating welcome/visitor centers	54%	60%	6%
Attracting people to visit and generate tax revenue	57%	59%	2%
Bringing conventions to the community	32%	42%	10%
Addressing infrastructure issues in the community related to tourism	24%	42%	18%
Attracting people to visit and support jobs	46%	41%	-5%
Providing research and intelligence to community's travel industry	27%	39%	12%
Providing funds for development of new community facilities and services that serve both residents and visitors	25%	39%	14%
Attracting international travelers	36%	36%	0%
Bringing national events to the community	32%	35%	3%
Educating tourism businesspeople in the community	28%	32%	4%
Providing free co-operative advertising/marketing opportunities to tourism businesses	24%	30%	6%
Community beautification efforts	21%	29%	8%
Providing free marketing to connect local businesses to customers	22%	27%	5%
Financially supporting non-profit events and attractions in the community	22%	26%	4%
Attracting businesses to start in/relocate to the community	31%	25%	-6%
Attracting film companies to make films in the community	24%	25%	1%
Regulating the hospitality industry	21%	18%	-3%
Paying for things like police and safety services	16%	18%	2%
Don't know	13%	5%	-8%

- The Opt-in sample has a different view of Explore Asheville and generally they expect a lot more from the organization.
- While they also agree that the main goal is marketing, it should be marketing to get visitors to spend money with local businesses and generate tax revenue.
- And 40% believe that it is the role of Explore Asheville to address infrastructure issues attributed to tourism and provide funds for new community facilities.

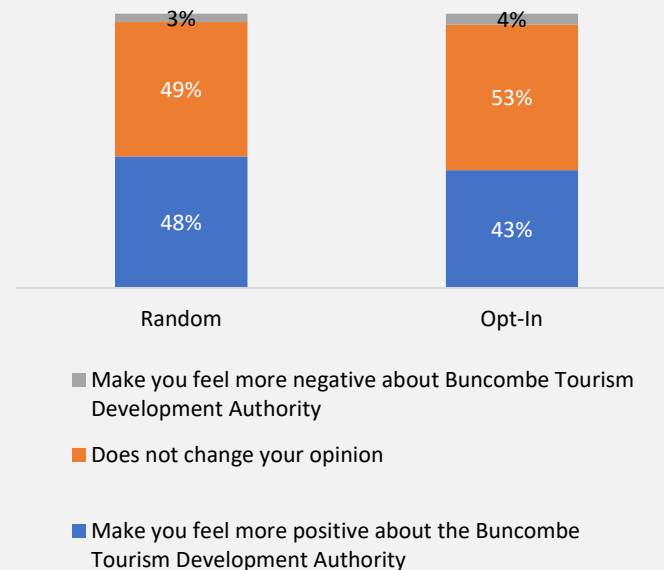
Past Use of Tax Dollars

- There is low awareness of the facilities that have been supported by the tourism tax. Among the Random sample, 41% were unaware of funding for any of the facilities mentioned. Awareness is somewhat higher among the Opt-in sample, but there are still a third with no awareness.
- Learning of the funding does have a significant impact – but there are still about half the audience that are not more positive based on this funding.

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

	Random	Opt-In	Total
None of these	41%	31%	33%
US Cellular Center	32%	45%	42%
NC Arboretum	29%	33%	32%
Pack Square Park	27%	36%	34%
Asheville Art Museum	26%	43%	39%
Asheville Riverfront Redevelopment	25%	43%	39%
Asheville Community Theater	20%	24%	23%
WNC Farmers Market	19%	17%	17%
Diana Wortham Theatre	18%	36%	32%
LEAF Global Arts Center	13%	25%	22%
YMI Cultural Center	10%	24%	21%
Black Mountain College Museum and Arts Center	10%	21%	18%
African American Heritage Museum and Trail	9%	16%	15%
Woodfin Greenway & Blueway	7%	25%	21%
Center for Craft	6%	19%	16%
Enka Recreation Destination	6%	14%	12%

Impact of Knowledge of Investments



MASTER PLAN

Q. 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?

Issue	Random	Asheville	County
Parking	61%	55%	66%
Housing affordability	59%	61%	58%
City cleanliness	50%	45%	53%
Homelessness/transients/panhandling	46%	49%	44%
Better sidewalks/making city more walkable	44%	50%	39%
Impact of tourism on neighborhoods	44%	41%	45%
Supporting local small businesses	43%	44%	43%
Transportation – buses, trolley, shuttles, etc.	42%	47%	39%
Public safety and policing issues	41%	39%	43%
Workforce affordability	37%	37%	37%
Walking trails or bike paths	35%	40%	32%
Support for arts and culture	32%	37%	29%
Maintaining parks and sports venues	27%	29%	26%
Tourism marketing for specific slow seasons	24%	21%	26%
Tourism marketing for the area	23%	20%	25%
Developing or renovating new tourist districts/areas	21%	20%	21%
Developing or renovating additional arts businesses and events	18%	17%	19%
Developing new sports facilities and entertainment facilities	15%	16%	15%
More and different retail	14%	13%	14%
Signage	14%	11%	16%
More and different restaurants	13%	12%	14%
Developing or renovating additional sports venues or facilities	12%	12%	12%
Providing signage in the community	11%	12%	10%
Other	5%	5%	5%

- Residents across both Asheville and within the county have similar attitudes regarding what should be addressed in the master plan.

The top issues are:

- Parking
 - Housing affordability
 - City cleanliness
- Asheville residents are also interested in:
 - Homelessness/panhandling
 - Better sidewalks/making the city more walkable
 - Transportation/buses, trolley, shuttles
- County residents are also interested in:
 - Impact of tourism on neighborhoods

Q. 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?

Issue	Random	Opt-In	Diff
Better sidewalks/making city more walkable	44%	66%	22%
Transportation – buses, trolley, shuttles, etc.	42%	64%	22%
Walking trails or bike paths	36%	55%	19%
Support for arts and culture	32%	51%	19%
Impact of tourism on neighborhoods	43%	53%	10%
Developing or renovating additional arts businesses and events	18%	26%	8%
Maintaining parks and sports venues	27%	34%	7%
Providing signage in the community	10%	17%	7%
Workforce affordability	37%	42%	5%
City cleanliness	50%	54%	4%
Signage	13%	16%	3%
Developing new sports facilities and entertainment facilities	15%	17%	2%
Developing or renovating additional sports venues or facilities	12%	14%	2%
Parking	61%	62%	1%
Public safety and policing issues	41%	42%	1%
Supporting local small businesses	43%	42%	-1%
Tourism marketing for the area	23%	22%	-1%
Developing or renovating new tourist districts/areas	21%	18%	-3%
Homelessness/transients/panhandling	46%	42%	-4%
Tourism marketing for specific slow seasons	24%	18%	-6%
Housing affordability	60%	53%	-7%
More and different restaurants	13%	4%	-9%
More and different retail	14%	5%	-9%

- There are differences between what the Random sample identified as the most important issues to address in the plan vs. the Opt-in sample.

Top issues among the Opt-In sample include:

- Better sidewalks/making city more walkable
 - Transportation
 - Parking
 - Walking trails or bike paths
- Compared to the Random sample, they place less importance on:
 - More and different retail
 - More and different restaurants
 - Housing affordability
 - Tourism marketing for slow seasons

Q. Imagine that you have 100 chips to allocate among these priorities. The more chips you allocate, the more important this topic is to you – and the more important it is to address it in the masterplan. You can dedicate all the chips to one priority or distribute it among several. Please allocate your 100 chips among these different options.

Issue – Random Sample	%	Allocation
Housing affordability	59%	19.2
Parking	61%	8.7
City cleanliness	50%	6.7
Supporting local small businesses	43%	6.1
Homelessness/transients/panhandling	46%	6.1
Public safety and policing issues	41%	5.5
Transportation – buses, trolley, shuttles, etc.	42%	5.5
Impact of tourism on neighborhoods	44%	5.3
Workforce affordability	37%	5.1
Better sidewalks/making city more walkable	44%	4.8
Walking trails or bike paths	35%	4.1
Support for arts and culture	32%	3.6
Tourism marketing for specific slow seasons	24%	2.9
Tourism marketing for the area	23%	2.4
Developing or renovating new tourist districts/areas	21%	1.9
Maintaining parks and sports venues	27%	1.8
Developing new sports facilities and entertainment facilities	15%	1.3
Developing or renovating additional arts businesses and events	18%	1.3
More and different restaurants	13%	1.1
Signage	14%	1.0
More and different retail	14%	1.0
Developing or renovating additional sports venues or facilities	12%	0.9
Providing signage in the community	11%	0.4

- Respondents were asked to allocate 100 chips among the issues they wanted to see addressed in the master plan. This provides a way to understand the importance of specific issues. By multiplying the percentage of people who chose an area for inclusion by the chips allocated, the net importance of each area becomes clear.
- One issue received more than twice as many net chips as the others – housing affordability. This was clearly the issue that rose to the top.
- Other issues that received higher levels of chip allocation included:
 - Parking
 - City cleanliness
 - Supporting local small businesses
 - Homelessness/transients/panhandling

Master Plan Issues

Allocation	Random	Opt-In
Housing affordability	19.2	12.0
Parking	8.7	8.2
City cleanliness	6.7	4.9
Homelessness/transients/panhandling	6.1	4.2
Supporting local small businesses	6.1	3.6
Public safety and policing issues	5.5	4.6
Transportation – buses, trolley, shuttles, etc.	5.5	8.6
Impact of tourism on neighborhoods	5.3	5.1
Workforce affordability	5.1	5.6
Better sidewalks/making city more walkable	4.8	8.2
Walking trails or bike paths	4.1	7.1
Support for arts and culture	3.6	6.7
Tourism marketing for specific slow seasons	2.9	1.4
Tourism marketing for the area	2.4	2.7
Developing or renovating new tourist districts/areas	1.9	1.3
Maintaining parks and sports venues	1.8	2.3
Developing or renovating additional arts businesses and events	1.3	2.2
Developing new sports facilities and entertainment facilities	1.3	1.6
More and different restaurants	1.1	0.2
Signage	1.0	0.6
More and different retail	1.0	0.2
Developing or renovating additional sports venues or facilities	0.9	1.1
Providing signage in the community	0.4	0.7

- There are some significant differences between the Random sample and the Opt-in sample.
- While both put housing affordability at the top of the list, it is more important to the Random sample.
- Other issues relatively more important to the Random sample are:
 - City cleanliness
 - Homelessness/transients/panhandling
 - Supporting local small businesses
- Areas more important to the Opt-in sample include:
 - Transportation
 - Better sidewalks/making community more walkable
 - Walking trails or bike paths
 - Support for arts and culture

APPENDIX

Random vs. Opt-In
Geographic Distribution
Questionnaire

RANDOM VS. OPT-IN

Economic Issues

ECONOMIC - Positive	Random	Opt-in
Tourism helps small businesses in my community	88%	85%
Money from people who visit supports independent businesses	87%	88%
Tourism supports jobs that people in my community need	79%	71%
Tourism generates a positive ROI (return on investment for my community)	74%	60%
Tourism jobs provide a good starting point and lead to career opportunities	68%	40%
Tourism supports well-paying jobs in my community	52%	25%

ECONOMIC - Negative	Random	Opt-in
The cost of housing is too high in the area because of people visiting the community	85%	78%
There is more homelessness and panhandling in the community because of tourism	64%	69%
Wages in the area are lower because of the impact of tourism and tourist related jobs	63%	77%
People offering their homes as rental properties for visitors has had a negative impact on my neighborhood	45%	57%
Tourism only helps the large businesses in my community	41%	33%

Quality of Life

QUALITY OF LIFE - Positive	Random	Opt-in
There are more restaurants and a greater variety of independently owned restaurants because of people visiting the area	88%	89%
Because of the tourism in the area, Asheville has been able to attract more airline options and flights	89%	91%
There are more independently owned retail shops and a greater variety of retail shops because of people visiting the area	81%	75%
There are more festivals and events because of people visiting the area	80%	78%
There are lots of things to do in the community that are here because of people visiting	76%	70%
Money from people who visit supports businesses that add to my enjoyment of Buncombe County	75%	70%
Tourism makes my community a nicer place to live	56%	46%

QUALITY OF LIFE - Negative	Random	Opt-in
There are problems with parking because of people visiting the community	88%	90%
Because we have too many people visiting the area, we have traffic problems	85%	89%
The area feels crowded and I can't enjoy my city/county as much because there are so many people visiting	72%	79%
Locals can't enjoy my community because of all the people visiting	63%	73%
The number of people visiting the area has a negative impact on the quality of life in the area	59%	74%
The city is not as clean as it should be because there are too many visitors	57%	67%

Other Economic Development & Taxes

OTHER ECONOMIC DEVELOPMENT	Random	Opt-in
Tourism shows people that my community is a good place to relocate	86%	83%
Tourism shows people that my community is a good place to retire	86%	83%
Tourism shows people that my community is a good place to move their business, or start a new business	84%	70%

TAXES	Random	Opt-in
My tax dollars are being spent to provide services to visitors rather than spending them on things that are good for residents	62%	75%
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%
People visiting the area are a drain on city and county resources	52%	73%
The tax revenue my community receives from people visiting reduces the amount of taxes I pay	41%	17%

Marketing

MARKETING - Positive	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%

MARKETING - Negative	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%
My community's advertising does not bring additional visitors to my area	19%	11%

Geographic Distribution of Respondents

Location	Random	Opt-In
Within the city limits of Asheville	40.4%	58.5%
In Buncombe County, but not in the city of Asheville	59.6%	37.5%
Outside of the County		4.0%
Asheville Neighborhood		
Downtown Asheville	10.6%	10.8%
North Asheville	14.3%	27.9%
South Asheville	14.8%	8.7%
West Asheville	28.0%	27.5%
East Asheville	21.7%	10.8%
Central Asheville (outside Downtown)	10.1%	13.2%
None of the above	0.5%	1.1%
County Location		
Within the Town of Biltmore Forest	3.6%	2.5%
Within the Town of Weaverville	6.8%	21.2%
Within the Town of Black Mountain	5.7%	3.7%
Within the Town of Woodfin	7.9%	5.9%
Within the Town of Montreat	0	0.3%
Eastern Buncombe County	16.5%	16.8%
Northern Buncombe County	10.4%	19.0%
Southern Buncombe County	17.2%	16.3%
Western Buncombe County	31.9%	14.1%

Questionnaire

Asheville Community Residents Survey

S1. What is the ZIP code of your primary residence? _____

D2. What is your age? _____ (TERMINATE IF <18)

S2. Do you live...?

- Within the city limits of Asheville
- In Buncombe County, but not in the city of Asheville
- Outside of Buncombe County (SKIP TO Q1)

S3. What neighborhood below best describes where you live?

If S2=1, use this list:

- Downtown Asheville
- North Asheville
- South Asheville
- West Asheville
- East Asheville
- Central Asheville (outside Downtown)
- None of the above

If S2=2, use this list (or we will delete if zip codes are defining)

- Within the Town of Biltmore Forest
- Within the Town of Weaverville
- Within the Town of Black Mountain
- Within the Town of Woodfin
- Within the Town of Montreat
- Eastern Buncombe County
- Northern Buncombe County
- Southern Buncombe County
- Western Buncombe County

S3. How long have you lived in the Asheville/Buncombe County area? Please respond in years. _____

D9. Are you...?

- Employed full time, outside a home office
- Employed full time, work from home office
- Employed part time, outside a home office
- Employed part time, work from home office
- Retired
- Do not work outside the home

(If employed outside of home)

D9a. Where is your place of employment located?

- Downtown Asheville
- North Asheville
- South Asheville
- West Asheville
- East Asheville
- Central Asheville (outside Downtown)
- Within the Town of Biltmore Forest
- Within the Town of Weaverville

SMARInsights

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- Within the Town of Black Mountain
- Within the Town of Woodfin
- Within the Town of Montreat
- Eastern Buncombe County
- Northern Buncombe County
- Southern Buncombe County
- Western Buncombe County
- Don't Know
- None of these

(If employed)

D10. 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

D10a. Aside from yourself, is anyone in your immediate or extended family employed...?

At a place that receives a great deal of benefit from visitors to the area	Yes	No
At a place that receives some benefit from visitors to the area	Yes	No

1. How much do you agree with this statement? I am proud of my <u>community</u> .	
Completely agree	
Somewhat agree	
Neither agree nor disagree	
Somewhat disagree	
Completely disagree	
2. Overall, how much do you agree that tourism is good for your <u>community</u> ? Would you say you...?	
Completely agree	
Somewhat agree	
Neither agree nor disagree	
Somewhat disagree	
Completely disagree	
2a. 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 <u>community</u> ? Would you say you...?	
Completely agree	
Somewhat agree	
Neither agree nor disagree	
Somewhat disagree	
Completely disagree	
2b. 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 <u>community</u> . Knowing the money is paid by the visitors, how much do you agree that tax-funded tourism promotion is good for your <u>community</u> ? Would you say you...?	

SMARInsights

2

Questionnaire

Completely agree	
Somewhat agree	
Neither agree nor disagree	
Somewhat disagree or	
Completely disagree	

3. For each of the following statements concerning tourism and your community, please indicate whether you agree or disagree with the statement.
Will use 4-point scale: Strongly agree, somewhat agree, somewhat disagree, strongly disagree with option for no opinion

TOURISM (ROTATE POSITIVE AND NEGATIVE STATEMENTS)

T	P	Tourism supports jobs that people in my community need
T	P	Tourism supports well-paying jobs in my community
T	P	Tourism generates a positive ROI (return on investment for my community)
T	P	The tax revenue my community receives from people visiting reduces the amount of taxes I pay
T	P	Tourism helps small businesses in my community
T	P	Tourism makes my community a nicer place to live
T	P	There are lots of things to do in the community that are here because of people visiting
T	P	Money from people who visit supports independent businesses
T	P	Money from people who visit supports businesses that add to my enjoyment of Buncombe County
T	P	Because of the tourism in the area, Asheville has been able to attract more airline options and flights
T	P	There are more restaurants and a greater variety of independently owned restaurants because of people visiting the area
T	P	There are more independently owned retail shops and a greater variety of retail shops because of people visiting the area
T	P	There are more festivals and events because of people visiting the area
T	P	Tourism shows people that my community is a good place to relocate
T	P	Tourism shows people that my community is a good place to retire
T	P	Tourism shows people that my community is a good place to move their business, or start a new business
T	P	The tax revenue my community receives from people visiting has gone to support important community services
T	P	The tax revenue my community receives from people visiting has gone to build amenities that make this a better place to live
T	P	Tourism jobs provide a good starting point and lead to career opportunities
T	N	My tax dollars are being spent to provide services to visitors rather than spending them on things that are good for residents
T	N	People visiting the area are a drain on city and county resources
T	N	There are problems with parking because of people visiting the community
T	N	The cost of housing is too high in the area because of people visiting the community

T	N	Because we have too many people visiting the area, we have traffic problems
T	N	The number of people visiting the area has a negative impact on the quality of life in the area
T	N	Tourism only helps the large businesses in my community
T	N	Locals can't enjoy my community because of all the people visiting
T	N	Wages in the area are lower because of the impact of tourism and tourist related jobs
T	N	The area feels crowded and I can't enjoy my city/county as much because there are so many people visiting
T	N	People offering their homes as rental properties for visitors has had a negative impact on my neighborhood
T	N	There is more homelessness and panhandling in the community because of tourism
T	N	The city is not as clean as it should be because there are too many visitors

TOURISM PROMOTION

TP	P	The money my community invests in tourism promotion fuels the local economy
TP	P	I think it is a good use of lodging tax money to promote tourism
TP	P	The taxes visitors pay cover the cost for any marketing done by my community
TP	P	My community's tourism office spends money responsibly
TP	P	It's important to promote tourism so that Asheville and Buncombe County don't lose out to other competitive destinations
TP	N	When the community spends money to promote tourism, it is only helping businesses that should be doing their own marketing
TP	N	My community's advertising does not bring additional visitors to my area
TP	N	Using tax dollars to promote tourism is wasteful
TP	N	My community should stop spending money to promote tourism and bring visitors to the area
TP	N	Visitors will continue to come to my community even if we stopped all tourism advertising

4. [For each P statement about tourism (T) they strongly disagree with ask]
For each of following statements, which statement best describes your position?
1.....I don't believe it to be true
2.....I believe it's true, but it doesn't change my overall opinion about tourism
3.....If it were proven to be true, it would change my opinion

5. [For each P statement about tourism promotion (TP) they strongly disagree with ask]
For each of following statements, which statement best describes your position?
1.....I don't believe it to be true
2.....I believe it's true, but it doesn't change my overall opinion about tourism promotion
3..... If it were proven to be true, it would change my opinion

6. [Among the N statements they agree with ask separately for T and TP]
Please rank these in order of how much they impact your views on tourism and tourism funding. For each item, assign a value, ranking the item that has the strongest impact with a value of 1, and numbering sequentially. Values may not be repeated.

7. As you understand it, what are the primary responsibilities of your community tourism office?
Select all that apply. [ROTATE]

Questionnaire

Attracting people to visit and spend money with local businesses	
Addressing infrastructure issues in the community related to tourism	
Bringing conventions to the community	
Attracting people to visit and support jobs	
Attracting people to visit and generate tax revenue	
Paying for things like police and safety services	
Attracting vacation travelers	
Community beautification efforts	
Attracting international travelers	
Attracting businesses to start in/relocate to the community	
Regulating the hospitality industry	
Bringing national events to the community	
Marketing the community as a tourism destination	
Financially supporting non-profit events and attractions in the community	
Providing free co-operative advertising/marketing opportunities to tourism businesses	
Providing funds for development of new community facilities and services that serve both residents and visitors	
Providing research and intelligence to community's travel industry	
Operating welcome/visitor centers	
Attracting film companies to make films in the community	
Educating tourism businesspeople in the community	
Providing free marketing to connect local businesses to customers	
Don't know	
8. 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? [ROTATE]	
Maintaining parks and sports venues	
Developing new sports facilities and entertainment facilities	
Better sidewalks/making city more walkable	
Parking	
Walking trails or bike paths	
Workforce affordability	
City cleanliness	
Impact of tourism on neighborhoods	
Transportation – buses, trolley, shuttles, etc.	
Homelessness/transients/panhandling	
Public safety and policing issues	
Housing affordability	
Tourism marketing for the area	
Tourism marketing for specific slow seasons	
More and different restaurants	
More and different retail	
Supporting local small businesses	
Signage	
Developing or renovating new tourist districts/areas	
Developing or renovating additional arts businesses and events	
Developing or renovating additional sports venues or facilities	

Providing signage in the community	
Support for arts and culture	
Other, please specify	
8a. (Show all selected in Q8) These are the areas that you have indicated that you would like to see addressed in the tourism master plan. The Buncombe County Tourism Development Authority (BCTDA) has legal requirements established by state law that limit how it can spend its money. At the same time, the master plan will help guide the community in various ways aside from direct funding through the Tourism Authority.	
Therefore, we want to understand your priorities, so now imagine that you have 100 chips to allocate among these priorities. The more chips you allocate, the more important this topic is to you – and the more important it is to address it in the masterplan. You can dedicate all the chips to one priority or distribute it among several. Please allocate your 100 chips among these different options.	
9. 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.	
[ROTATE]	Aware received funding from Tourism Product Development Fund
NC Arboretum	
African American Heritage Museum and Trail	
LEAF Global Arts Center	
YMI Cultural Center	
Center for Craft	
Enka Recreation Destination	
Asheville Riverfront Redevelopment	
Black Mountain College Museum and Arts Center	
Woodfin Greenway & Blueway	
Diana Wortham Theatre	
WNC Farmers Market	
Asheville Community Theater	
US Cellular Center	
Pack Square Park	
Asheville Art Museum	
None of these	
9a. Does knowing about this funding...?	
Make you feel more positive about the Buncombe Tourism Development Authority	
Does not change your opinion	
Make you feel more negative about Buncombe Tourism Development Authority	

Questionnaire

DEMOS

The following questions are for classification purposes only so that your responses may be grouped with those of others.

- D1. How many leisure trips or vacations have you taken in the last 12 months? A leisure trip or vacation is any trip for enjoyment that included an overnight stay or a day trip that was more than 50 miles from home. _____
- D3. What is your marital status? Are you...?
Married or in a committed relationship
Divorced/separated
Widowed
Single/never married
- D8. Including you, how many people are currently living in your household? _____ (If 1, SKIP TO D4)
- D8a. How many are children under the age of 18? _____
- D4. Which of the following categories best represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate courses or degree
- D5. Which of the following categories best represents the total annual income for your household before taxes?
Less than \$35,000
\$35,000 but less than \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$150,000
\$150,000 but less than \$250,000
More than \$250,000
- D6. Which of the following best describes your ethnic heritage?
Caucasian/White
Black/African-American
Latino/Hispanic
Asian
American Indian
Other, please specify
Prefer not to answer
- D7. Do you identify with...?
Male
Female
Other
Prefer not to answer

- D9. In politics today, do you consider yourself...?
Republican
Democrat
Independent
Green Party
Libertarian
Other, _____
None of these
Prefer not to answer