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## Fredericksburg Resident Sentiment

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# Introduction and Methodology

Longwoods International's Resident Sentiment Research looks at public perceptions from all sides, including the positives and negatives of economic development, environmental impacts, overtourism, quality of life, and other areas.

This research will provide destinations with a unique opportunity to create a well-informed engagement strategy with locals on the subject of tourism in their communities. By understanding where public opinion lies from both positive and negative perspectives, destinations can work more effectively with local partners to increase support for tourism development efforts.

A self-completion survey was completed by 1,316 adults (18 years and older) residing in Gillespie County.

Fieldwork was completed between May 24 – June 8, 2023.

Fredericksburg Convention and Visitor Bureau and their community partners distributed the survey link via social media and other distribution channels. A drawing for a \$200 gift card to the award-winning Cabernet Grill was offered as an incentive to participate in the survey. Respondents provided their email address to enter the drawing.





## Key Findings

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# Key Findings

- **Fredericksburg residents have mixed views about supporting tourism, its development, and growth throughout the study.** Please note that three in four residents have no one in their households employed in the tourism and hospitality industry, so these mixed results aren't necessarily fueled by direct connections with the sector.
- **Support of tourism in Fredericksburg varies for its residents.** Almost half of Fredericksburg residents think tourism is good for their local area and care about the success of the tourism industry in their local area. Half believe their local area benefits from a strong tourism industry. However, only four in ten believe that in general, the positive benefits of tourism outweigh the negative impacts and want to see tourism thrive in their local area.
- **Tourism growth and the development of additional tourism assets are challenging topics with residents of Fredericksburg.** Four in ten residents believe tourism should be encouraged in Fredericksburg, while three in ten support tourism growth. Two in ten support developing/hosting more major events and building new tourism facilities to attract tourists to the area. Almost nine in ten agree planned and controlled tourism development is needed and half believe their local government should invest funds to expand parking options. Three in four residents believe that tourism development is happening too fast and one in ten feel they are consulted when major tourism development takes place.
- **The importance of promoting Fredericksburg as a tourist destination and the value of tourism is not crystal clear for Fredericksburg residents.** Four in ten residents like the way local tourism advertising represents their home. Two in ten believe the local government should support/help fund the promotion of tourism and support using public funds to partially fund tourism marketing efforts.

# Key Findings (Cont'd)

- **Fredericksburg residents have mixed views on how tourism financially benefits the community and their individual households.** Half of residents agree that tourism is important to the local economy and believe tourism attracts new businesses to the community. Six in ten agree that tourism attracts new residents to their area. However, three in ten assert that without the tourism tax revenues locals would pay higher state and local taxes, and two in ten believe the sales tax that tourists pay on their purchases adequately compensates for the wear and tear they create on Fredericksburg's infrastructure. **Significantly, only a quarter of Fredericksburg residents believe their standard of living is higher because of the money tourists spend in the community.**
- **A notable segment of residents doesn't believe hotel/lodging taxes should go toward tourism promotion.** Eight in ten believe hotel/lodging taxes should be used to help pay for local services, not to promote more tourism.
- **Tourism is not seen to attract workers and most Fredericksburg residents have a moderate to negative view of jobs in the sector.** Two in ten residents agree that tourism helps to recruit workforce to the community. Three in ten assert that there are jobs in the tourism industry with desirable pay and benefits, while six in ten assert most jobs in the tourism industry are low-paying and seasonal.



# Key Findings (Cont'd)

- **Most Fredericksburg residents do not believe their quality of life is better because of tourism, though there is opportunity for education.** A quarter of residents agree that tourism supports the preservation of local culture and protects the community's authenticity and three in ten believe they have more things to see and do in Fredericksburg because of tourism. Two in ten agree that the quality of life in Fredericksburg has improved because of increased tourism. **Residents are also aware of the opportunity costs for tourism** – nine in ten assert that tourists add to traffic congestion and parking problems, while three in four believe uncontrolled tourism growth is jeopardizing local heritage and culture.
- **The community has mixed views on how tourism could have a positive impact on the environment.** Three in four Fredericksburg residents believe long-term planning can limit environmental impacts caused by tourism. Only three in ten agree that tourism can help the environment as local governments and people seek to protect sensitive and scenic areas, and think it is a good alternative to more environmentally damaging development. Seven in ten thinks overcrowding by tourists is spoiling Fredericksburg's natural areas.
- **There is not strong support in Fredericksburg for accommodation-sharing services and most residents want them regulated.** Eight in ten Fredericksburg residents believe accommodation-sharing services should be regulated, just like hotels and other property-rental businesses. Eight in ten also believe people who use these services can be disruptive to local neighborhoods, while nine in ten assert accommodation-sharing services can cause inflation in rents, raising the cost of living for locals. Four in ten think they provide economic opportunities for residents and believe accommodation-sharing services provide visitors with the opportunity to experience local cultures.

# Key Findings (Cont'd)

- **Half of residents are welcoming to visitors and proud of what Fredericksburg has to offer tourists.** Six in ten look forward to showing off Fredericksburg when friends and family visit. Half feel they are ambassadors for Fredericksburg even among tourists they don't know.
- **Destination stewardship is a priority for residents, and they also support the Love FBGTX initiative.** Seven in ten believe destination management/stewardship should be a priority and the Fredericksburg CVB should highlight stewardship in its promotional messaging. Two in ten believe Fredericksburg is doing a good job balancing resident quality of life and visitor satisfaction, with less than two in ten neutral. Six in ten are aware of the Love FBGTX stewardship campaign and believe it's needed in their community.
- **The community is proud of living in Fredericksburg and interested in tourism.** Eight in ten residents are proud to call the area their home, and almost six in ten have found that visiting other places gave them a greater appreciation for their local area. Six in ten recommend local tourist sites to people who are visiting the area and half are interested in finding out what's happening when they come across local tourism news.





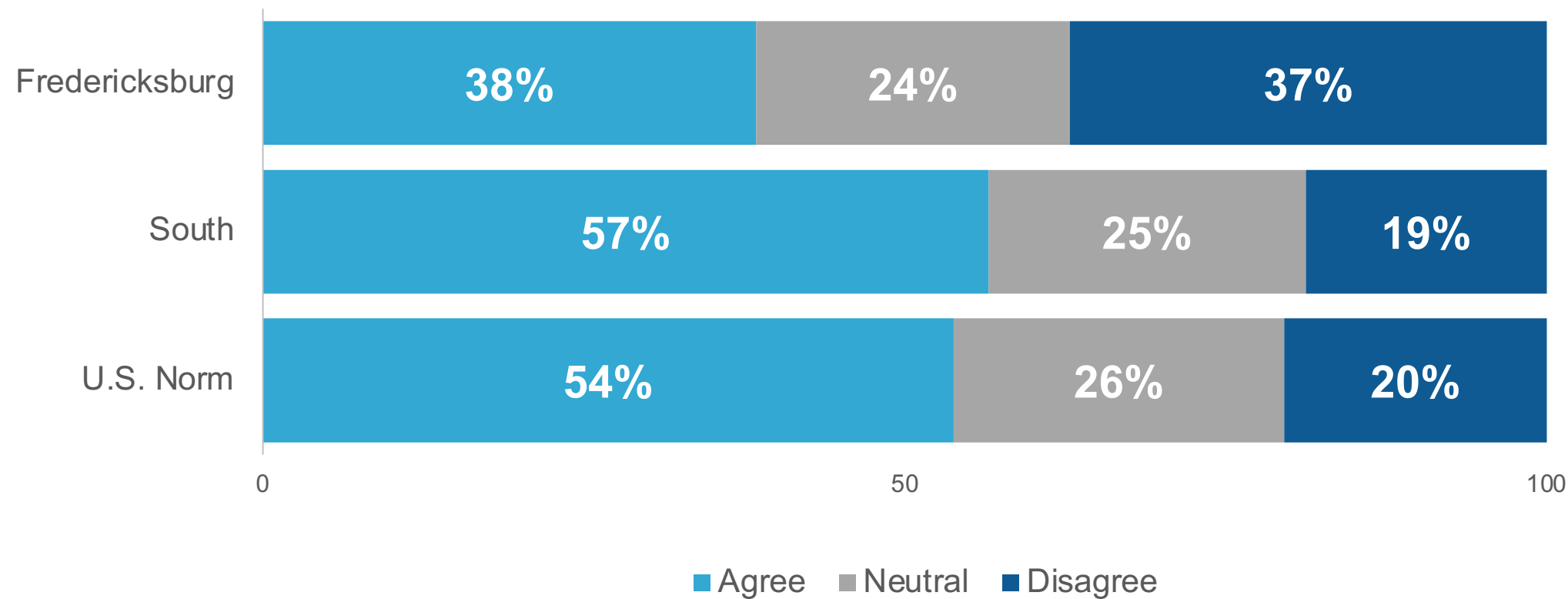
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## Overall Sentiment About Tourism

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# Overall Sentiment About Tourism

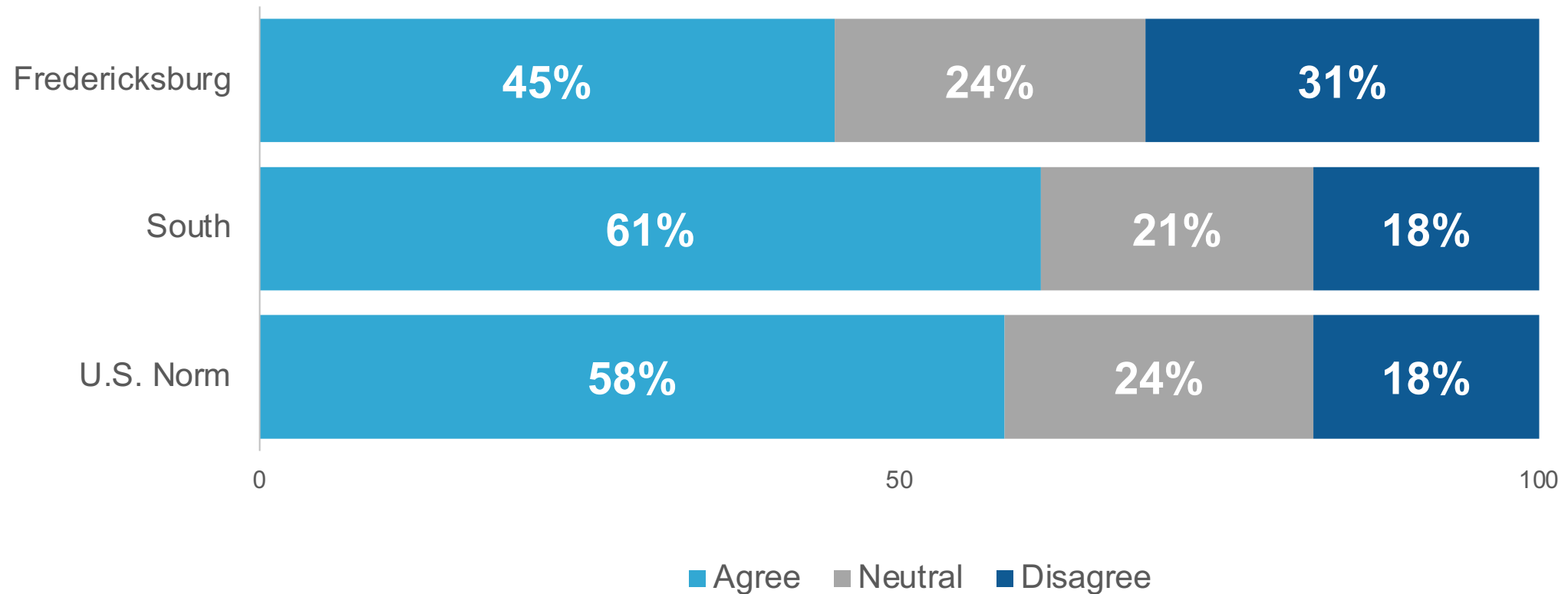
I want tourism to be important in my local area





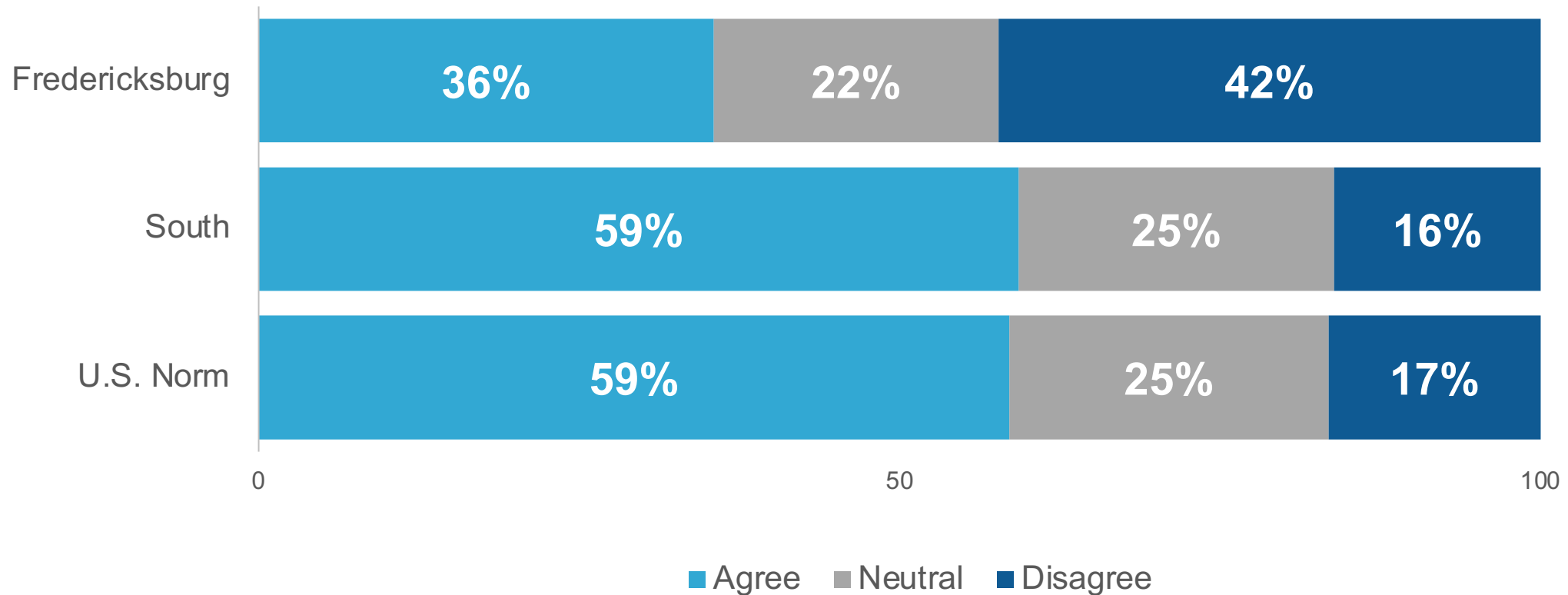
# Overall Sentiment About Tourism

Overall, I think tourism is good for my local area



# Overall Sentiment About Tourism

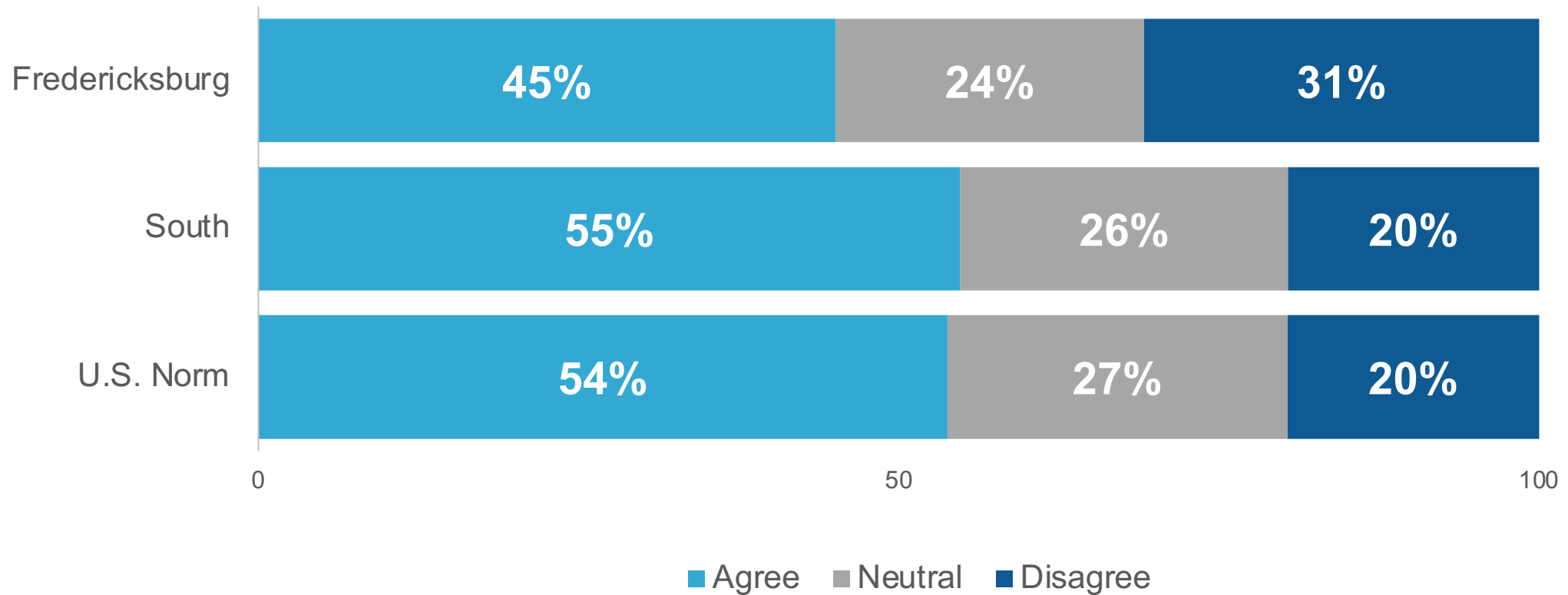
**In general, the positive benefits of tourism outweigh the negative impacts**





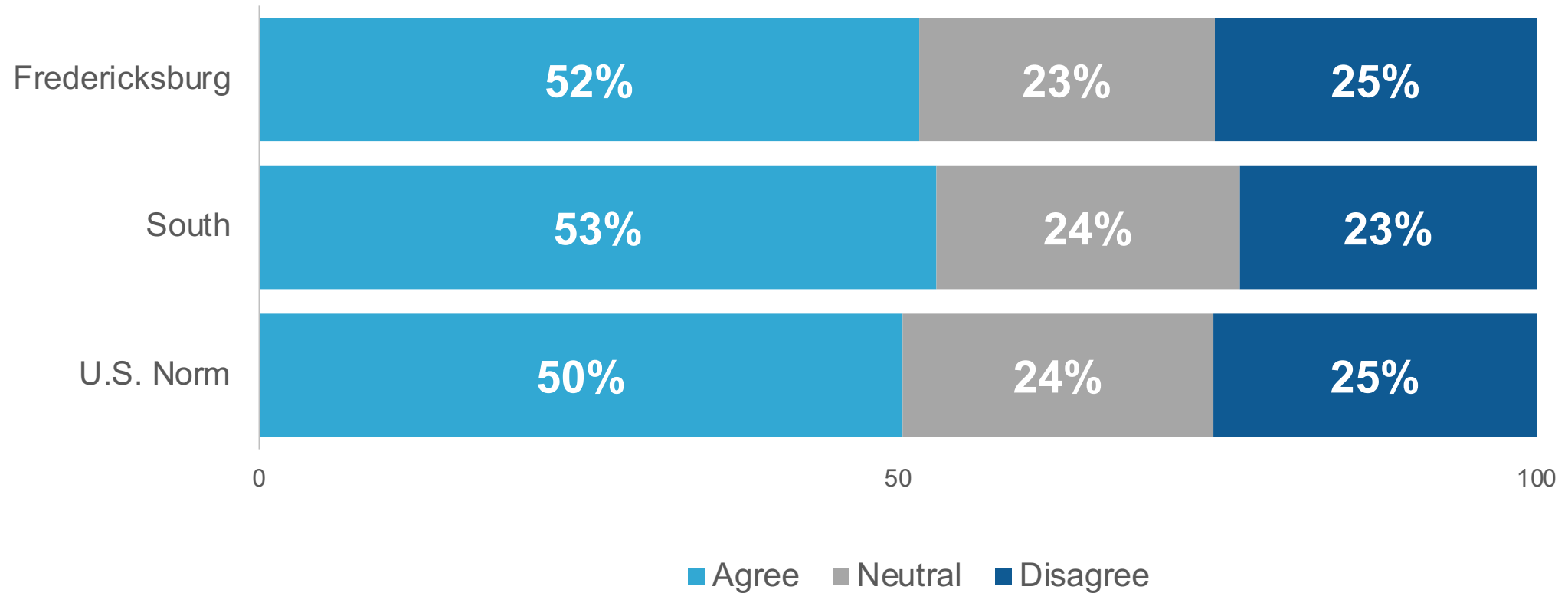
# Overall Sentiment About Tourism

**I care about the success of the tourism industry in my local area**



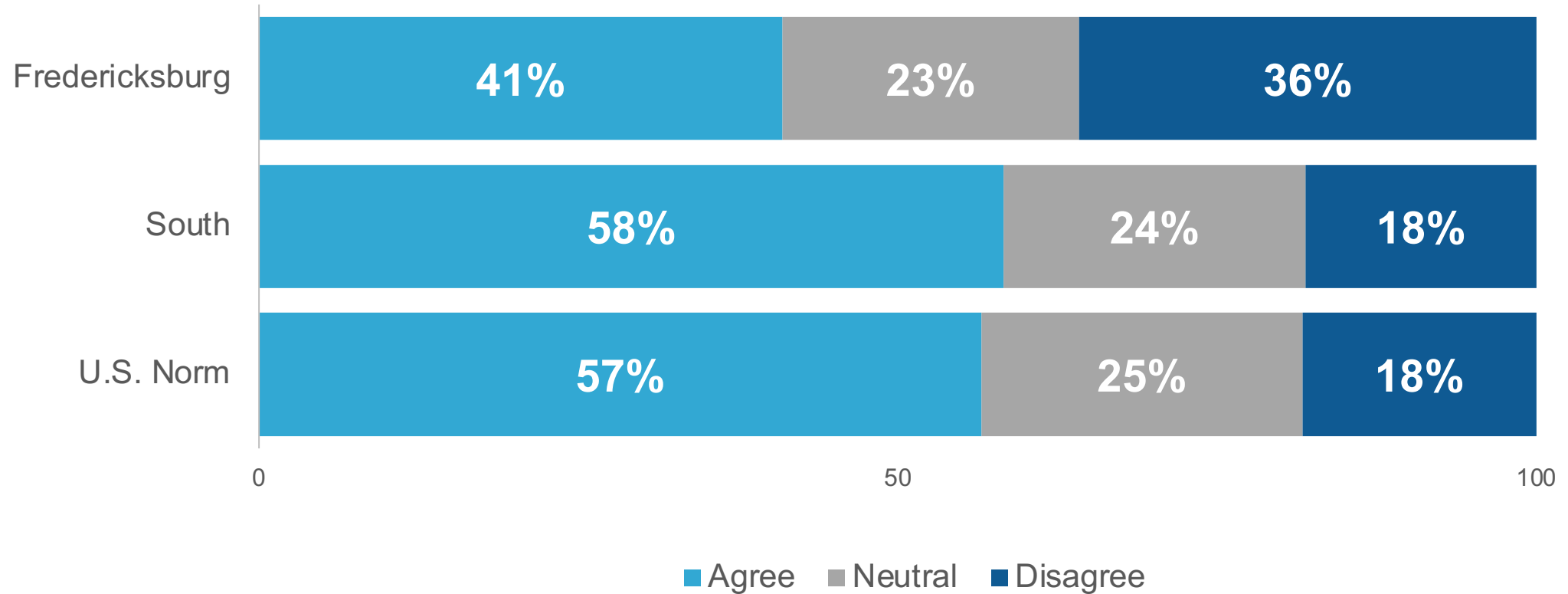
# Overall Sentiment About Tourism

## My local area benefits from a strong tourism industry



# Overall Sentiment About Tourism

**I want to see tourism thrive in my local area**





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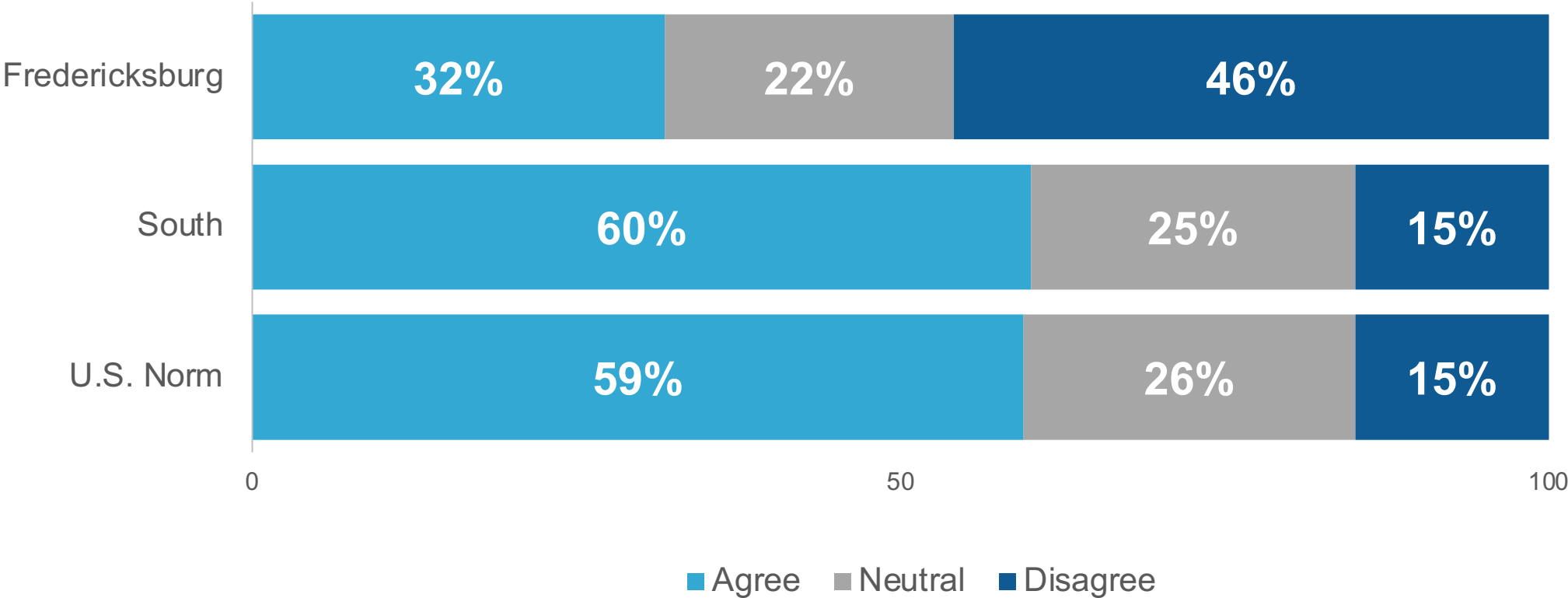
## Tourism Development and Growth

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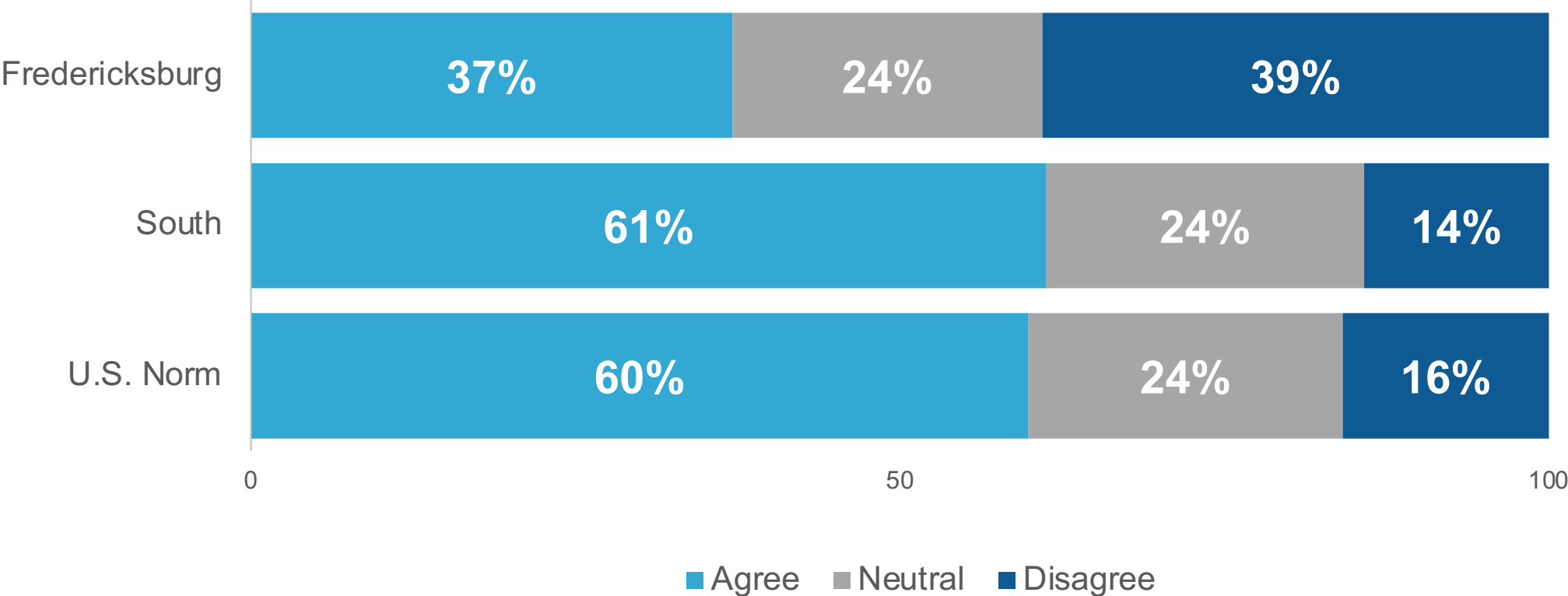
# Tourism Development and Growth

## I support tourism growth



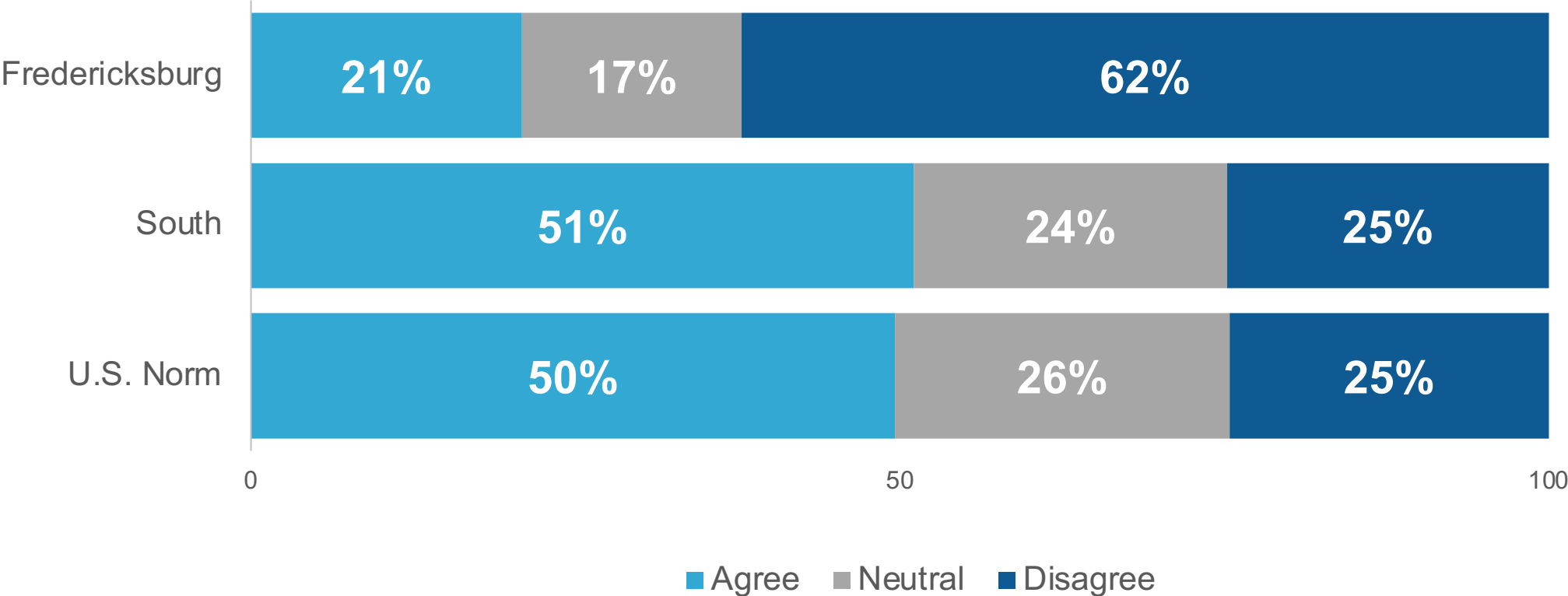
# Tourism Development and Growth

I believe tourism should be encouraged here



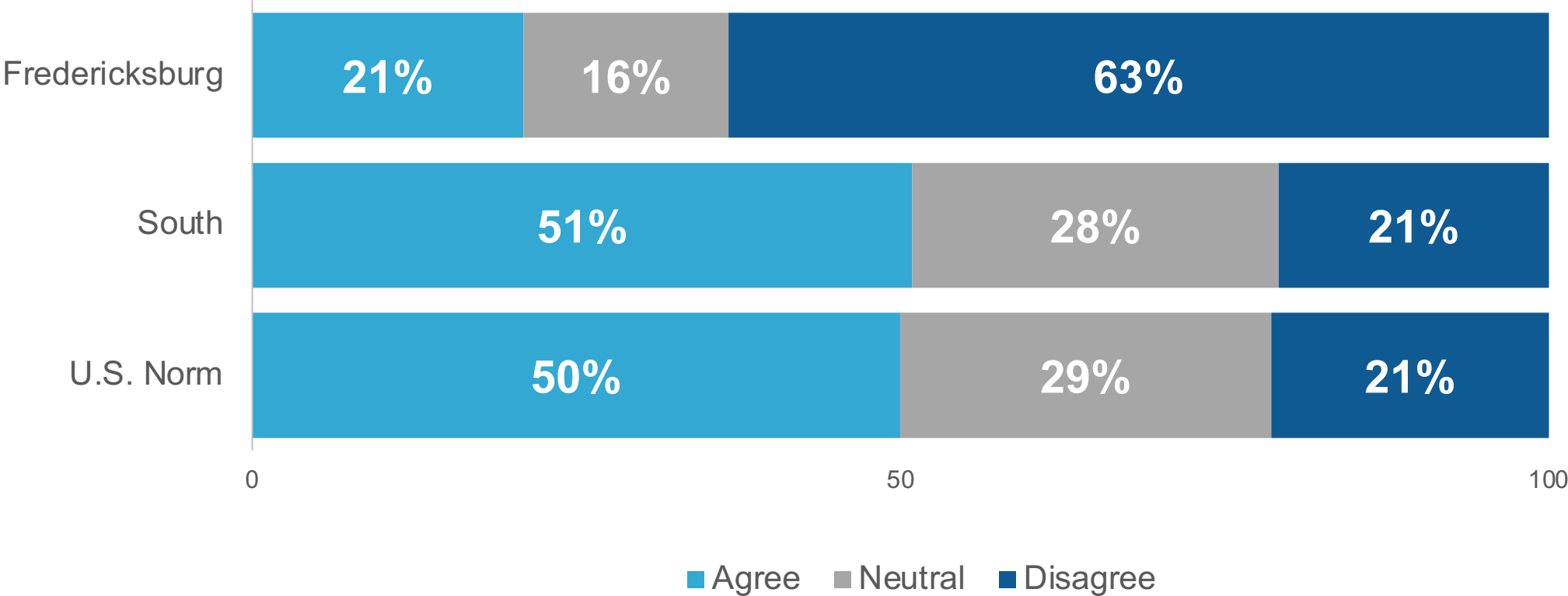
# Tourism Development and Growth

I would like to see more tourists coming to my area



# Tourism Development and Growth

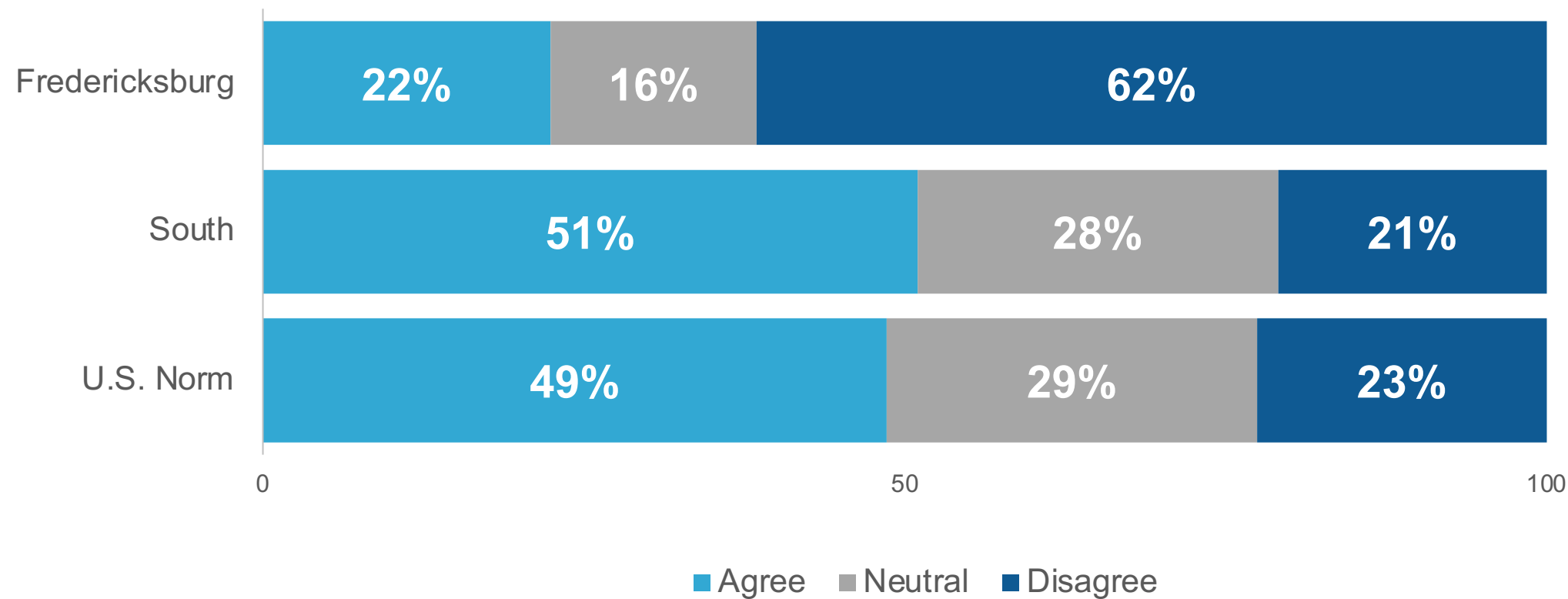
**We should develop/host more major events to attract tourists to our area**





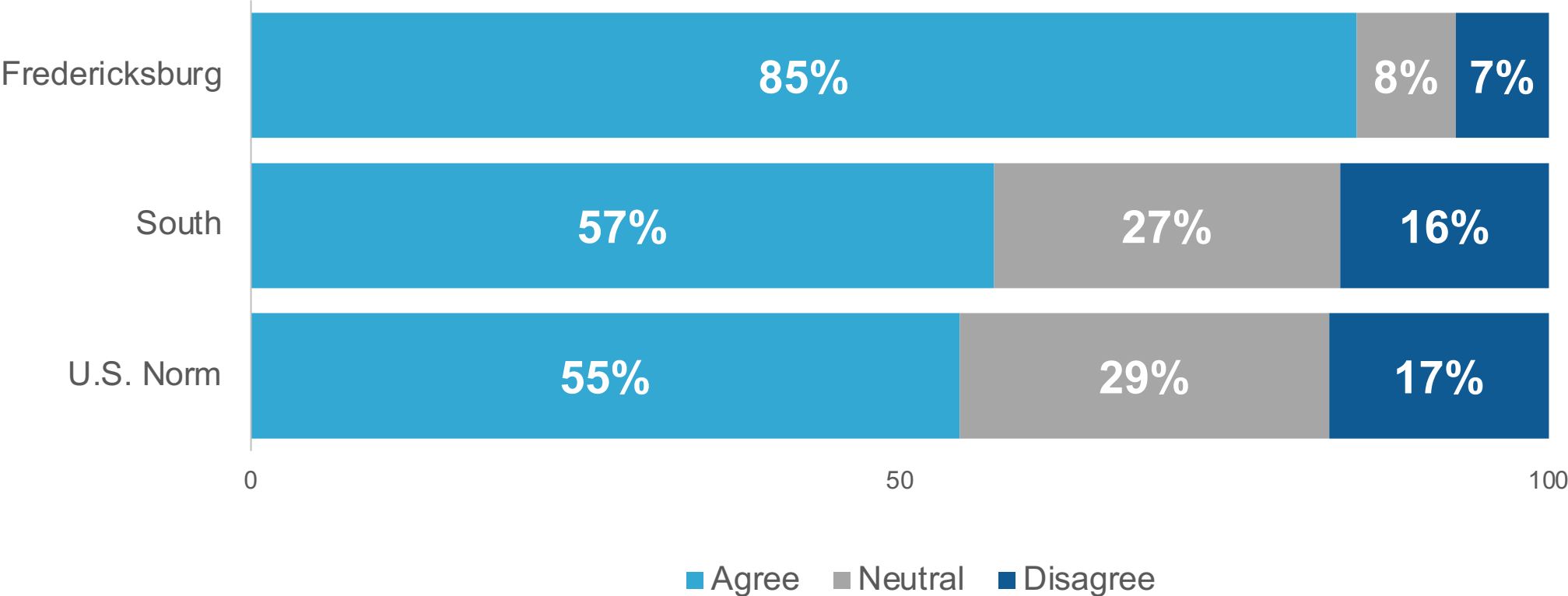
# Tourism Development and Growth

**I support building new tourism facilities that will attract visitors to this area**



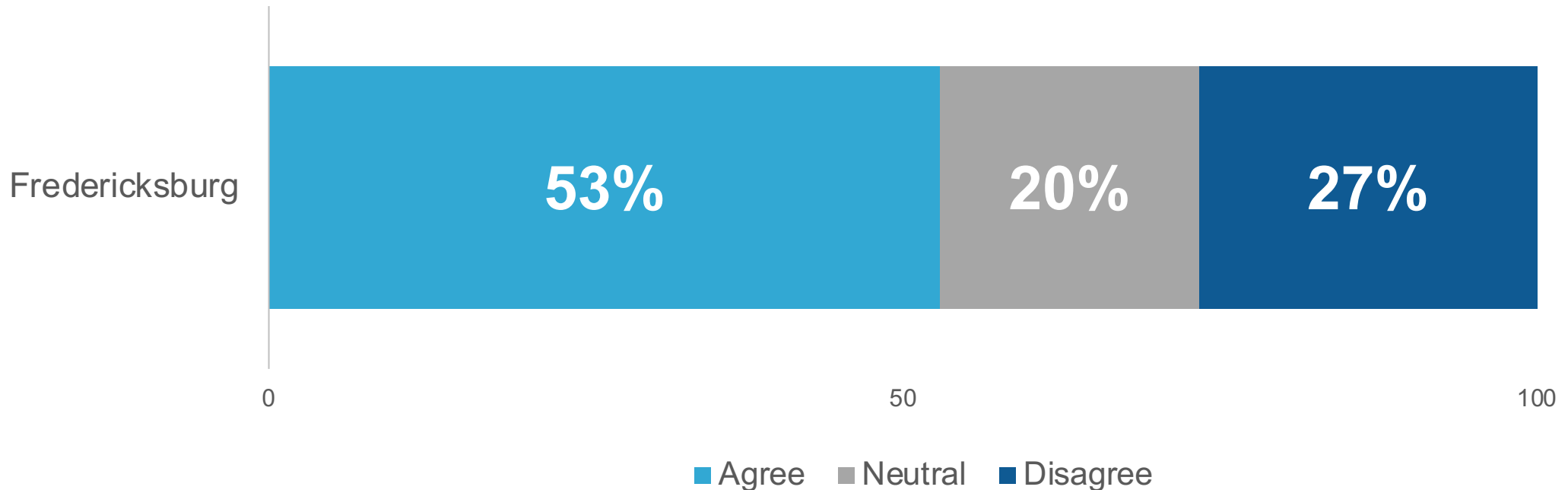
# Tourism Development and Growth

## We need planned and controlled tourism development



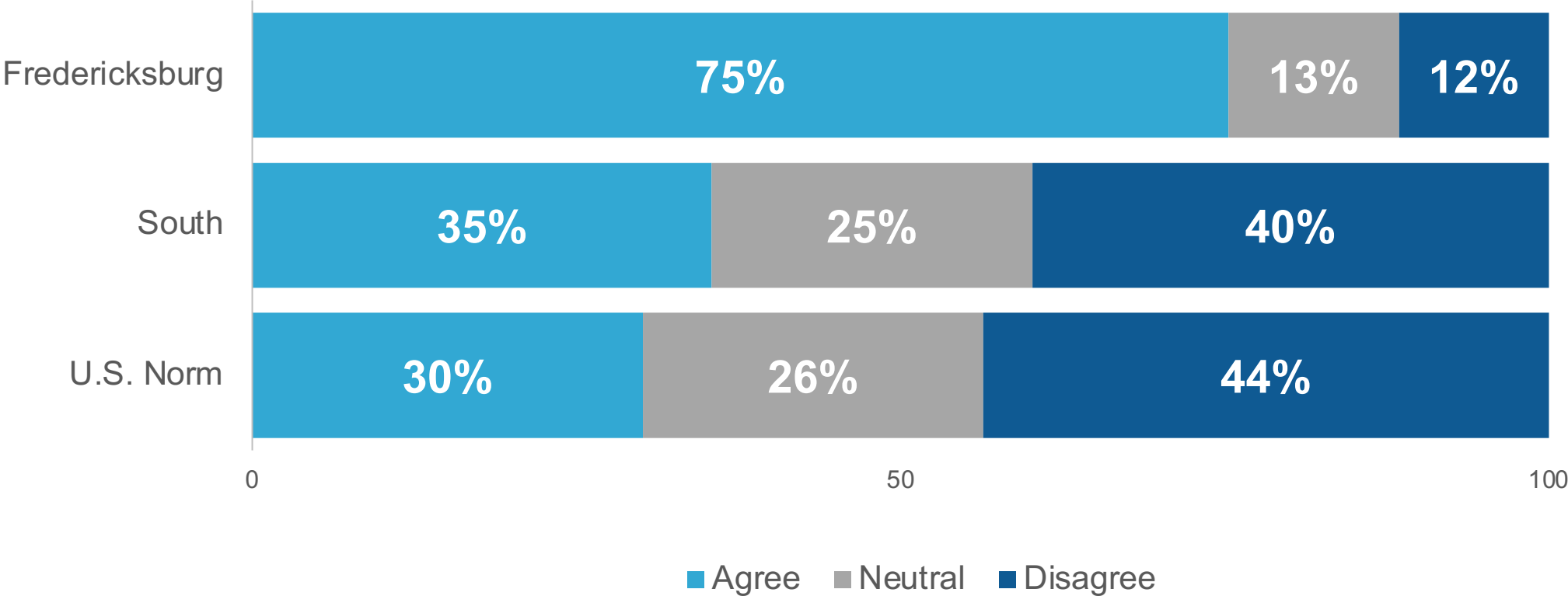
# Tourism Development and Growth

**My local government should invest funds to expand parking options in this area**



# Tourism Development and Growth

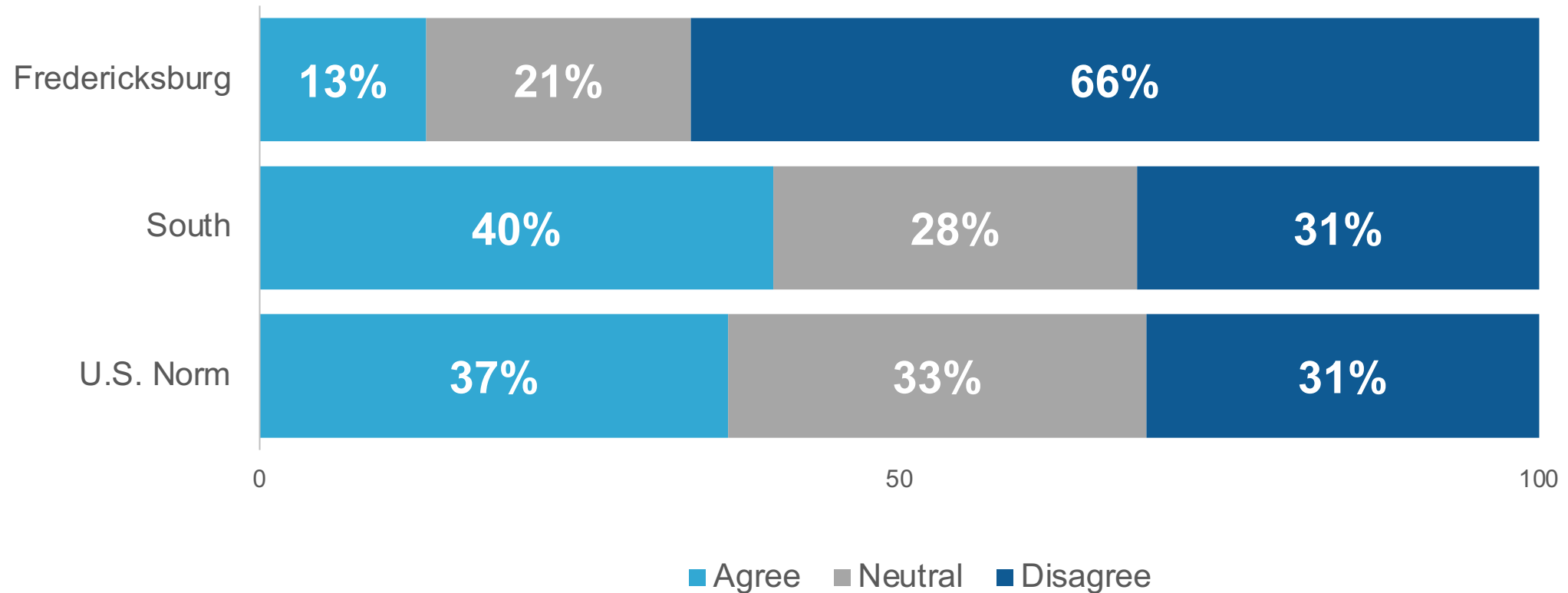
## Tourism development is happening too fast in this area





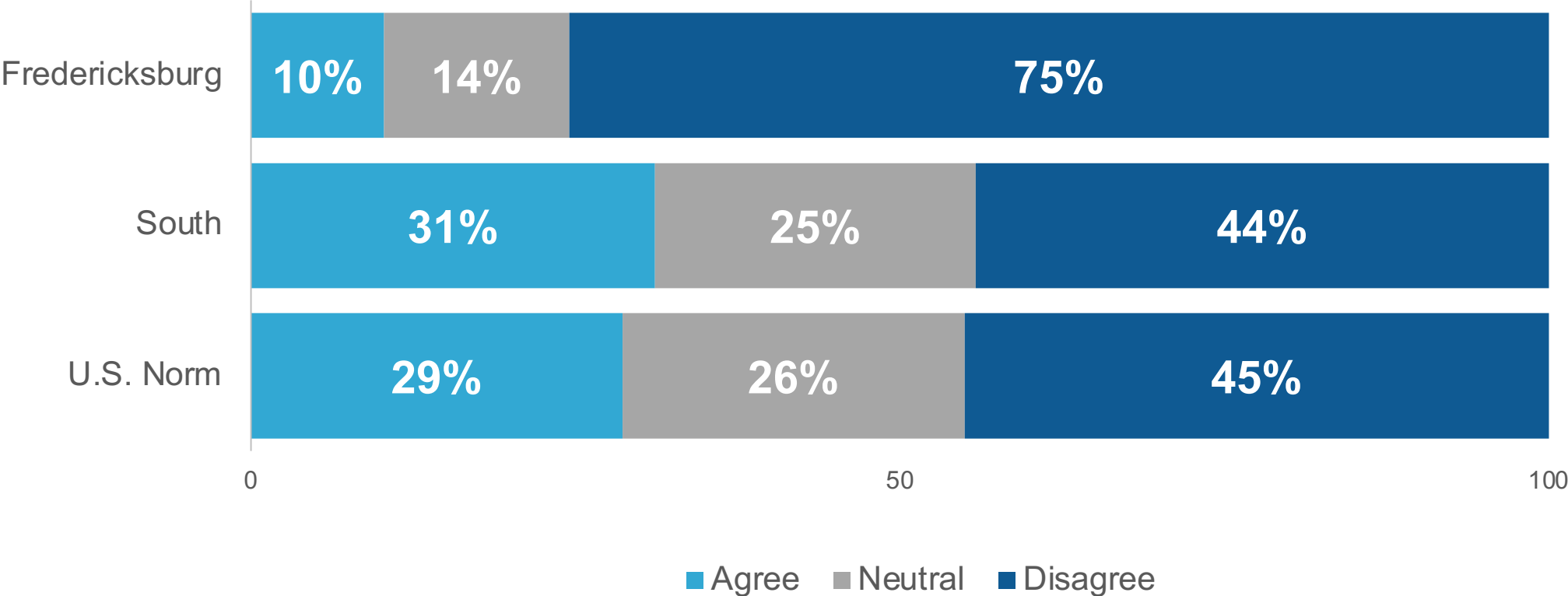
# Tourism Development and Growth

**My local government is doing a good job managing the pace of tourism development**



# Tourism Development and Growth

**Residents are consulted when major tourism development takes place in this area**





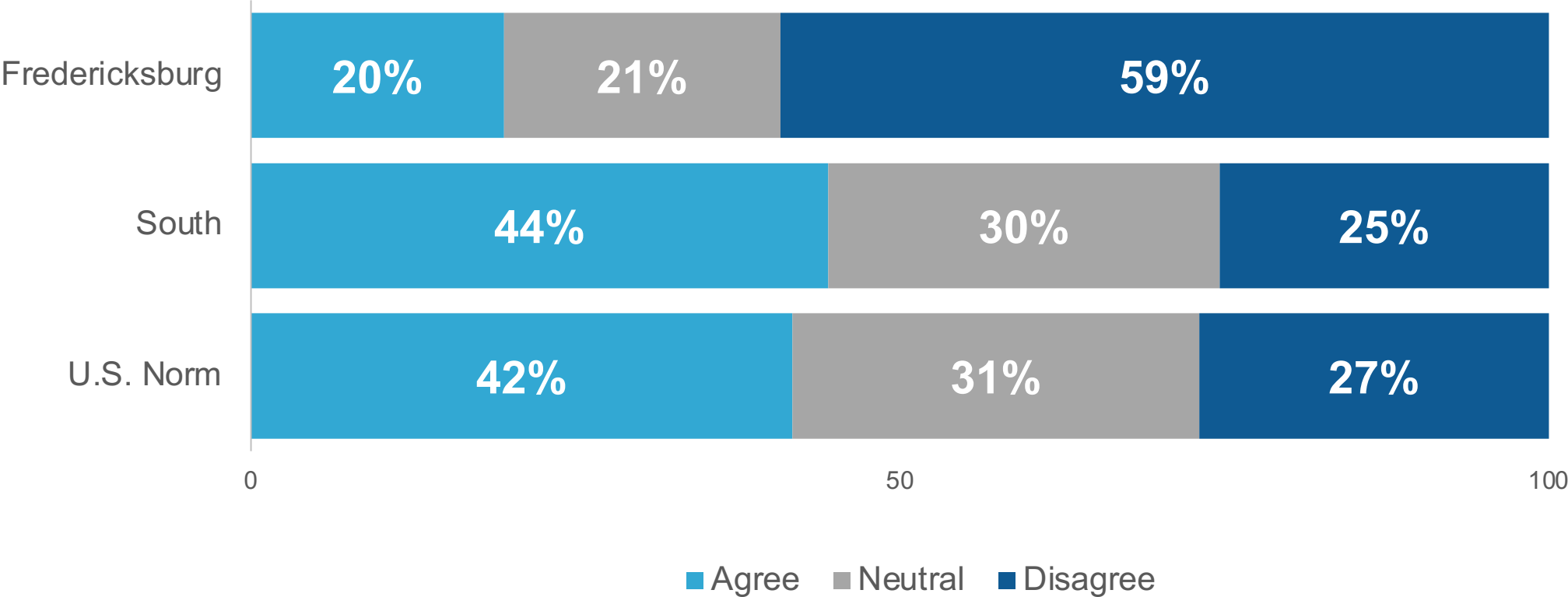
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## Tourism Promotion

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# Tourism Promotion

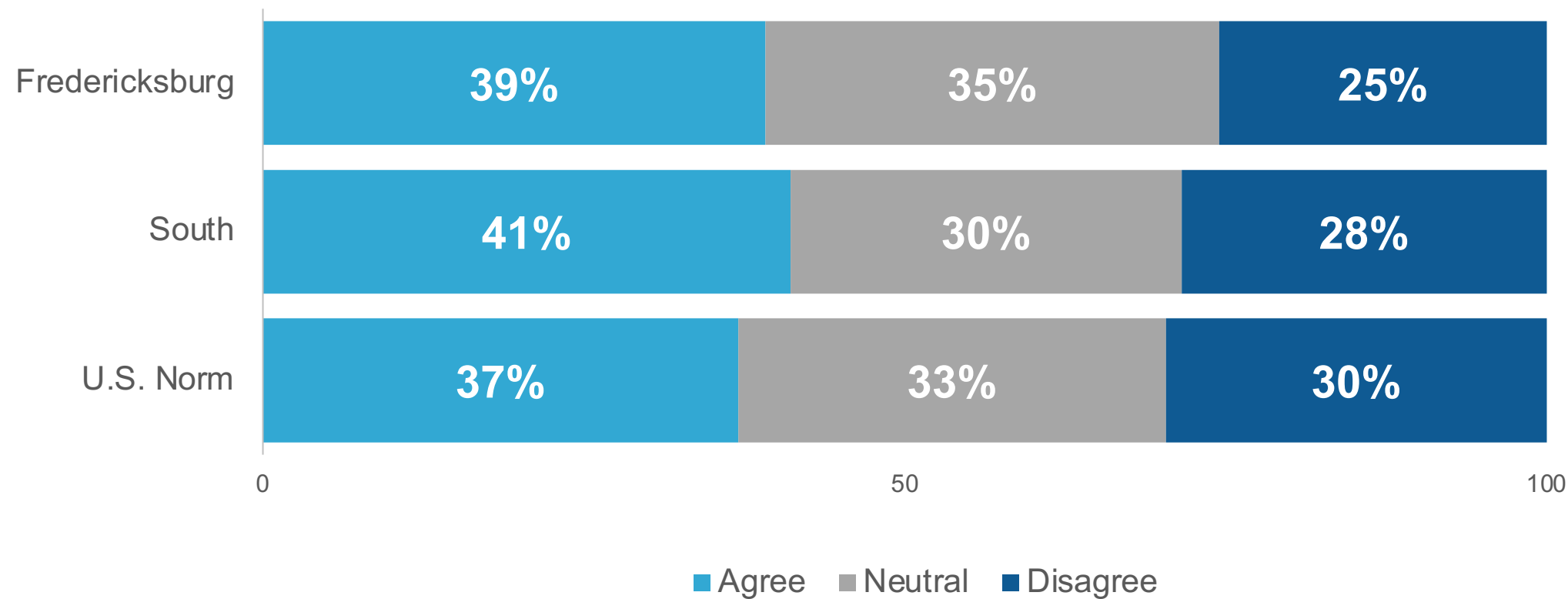
My local government should support/help fund the promotion of tourism





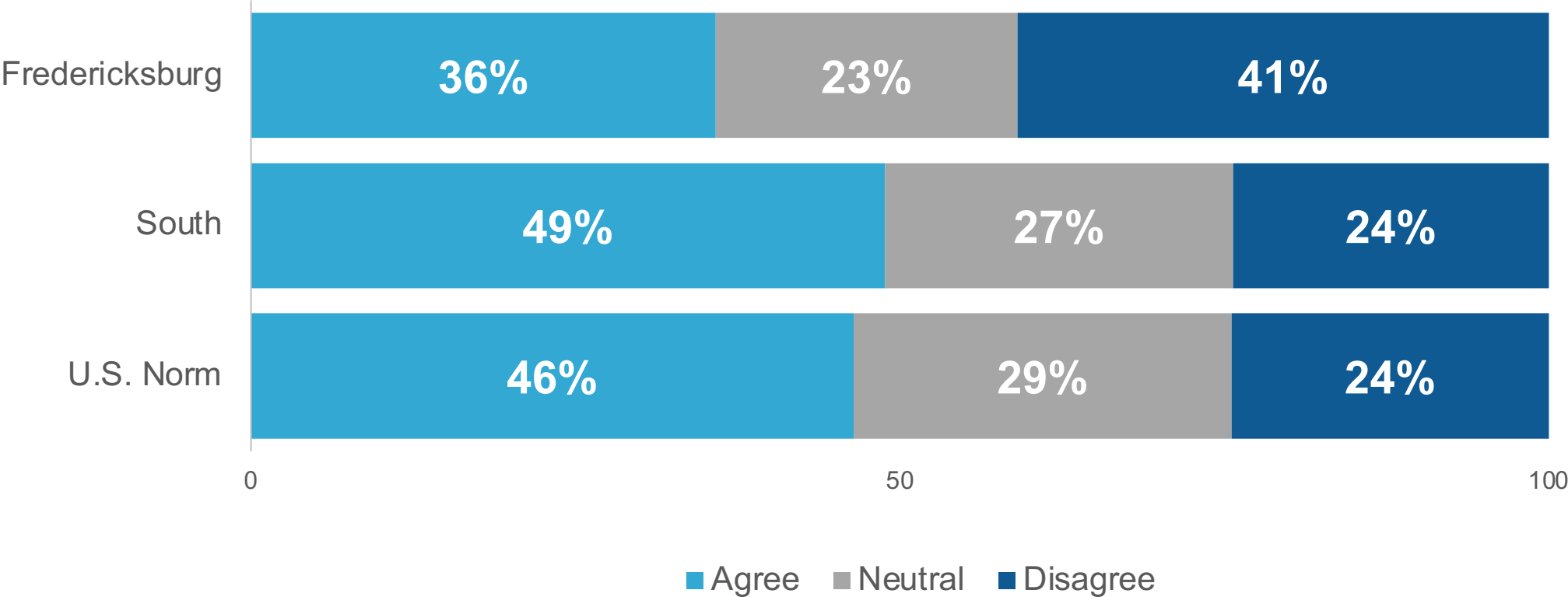
# Tourism Promotion

My local government is doing a good job at promoting tourism to this area



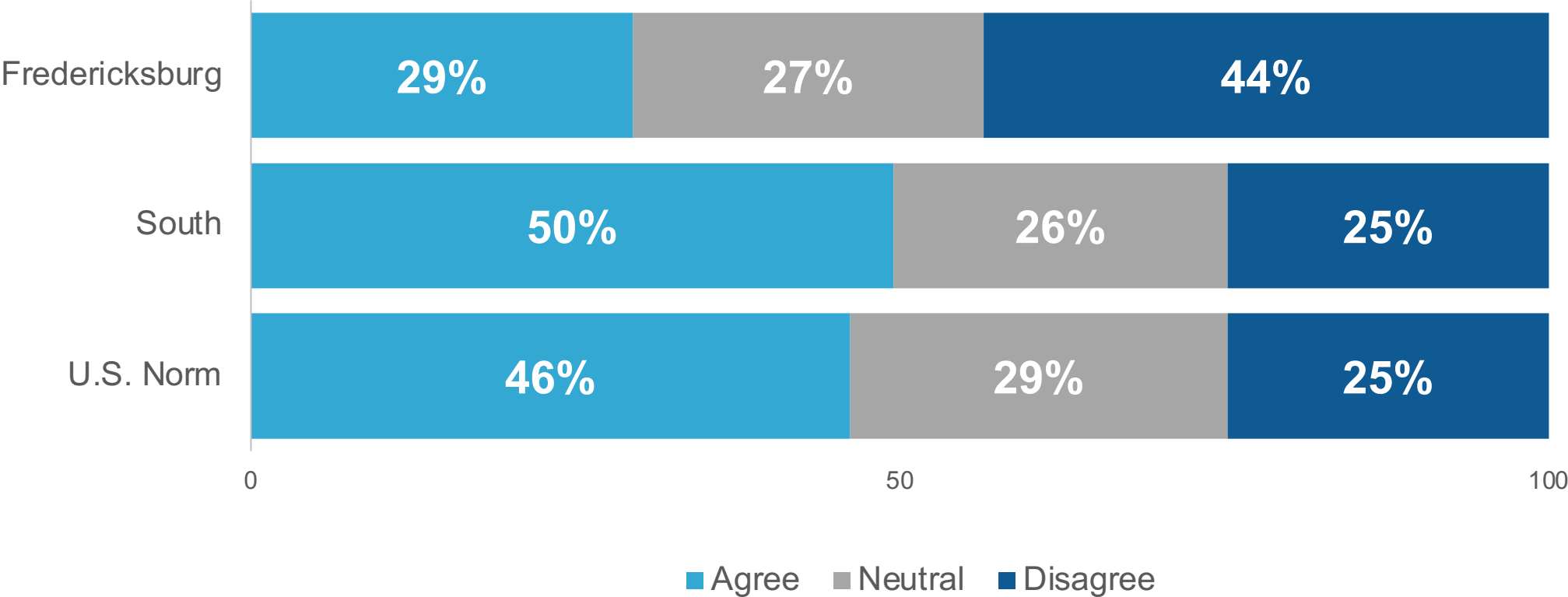
# Tourism Promotion

I like the way local tourism advertising represents my home



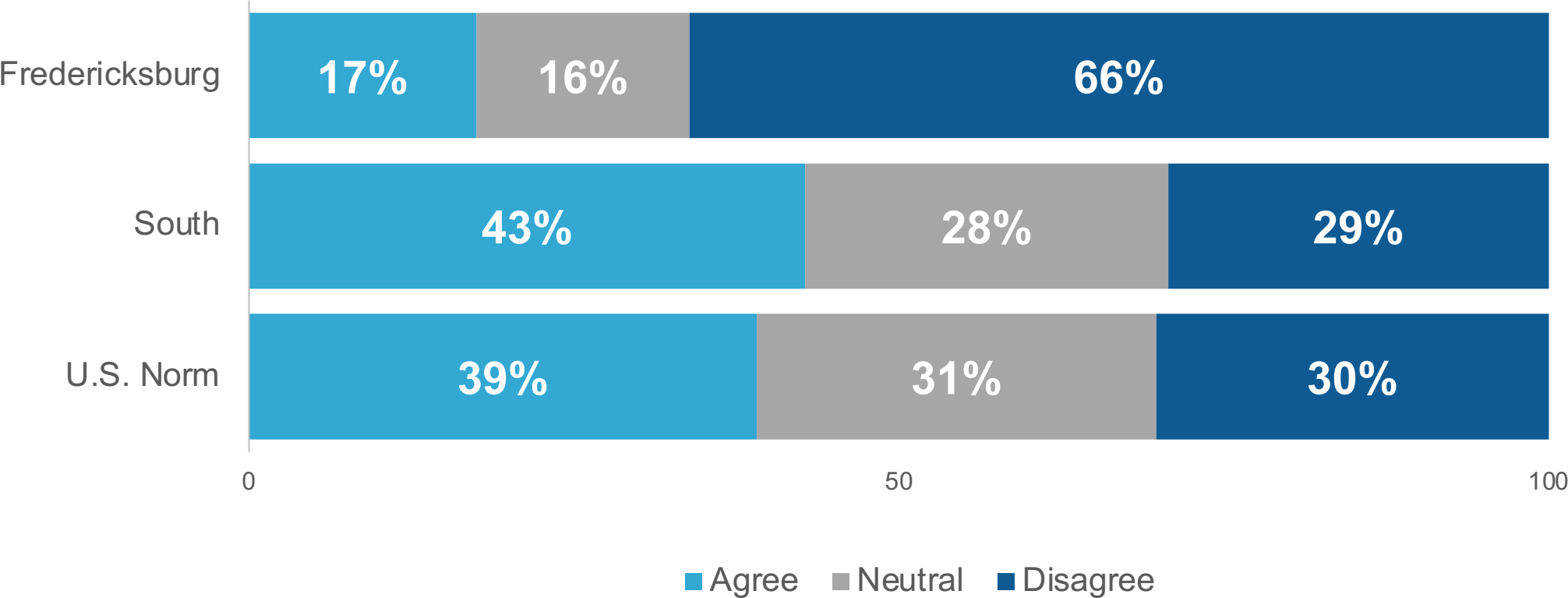
# Tourism Promotion

## Tourism marketing reflects the diversity in my local area



# Tourism Promotion

**I support using public funds to partially fund tourism marketing efforts**



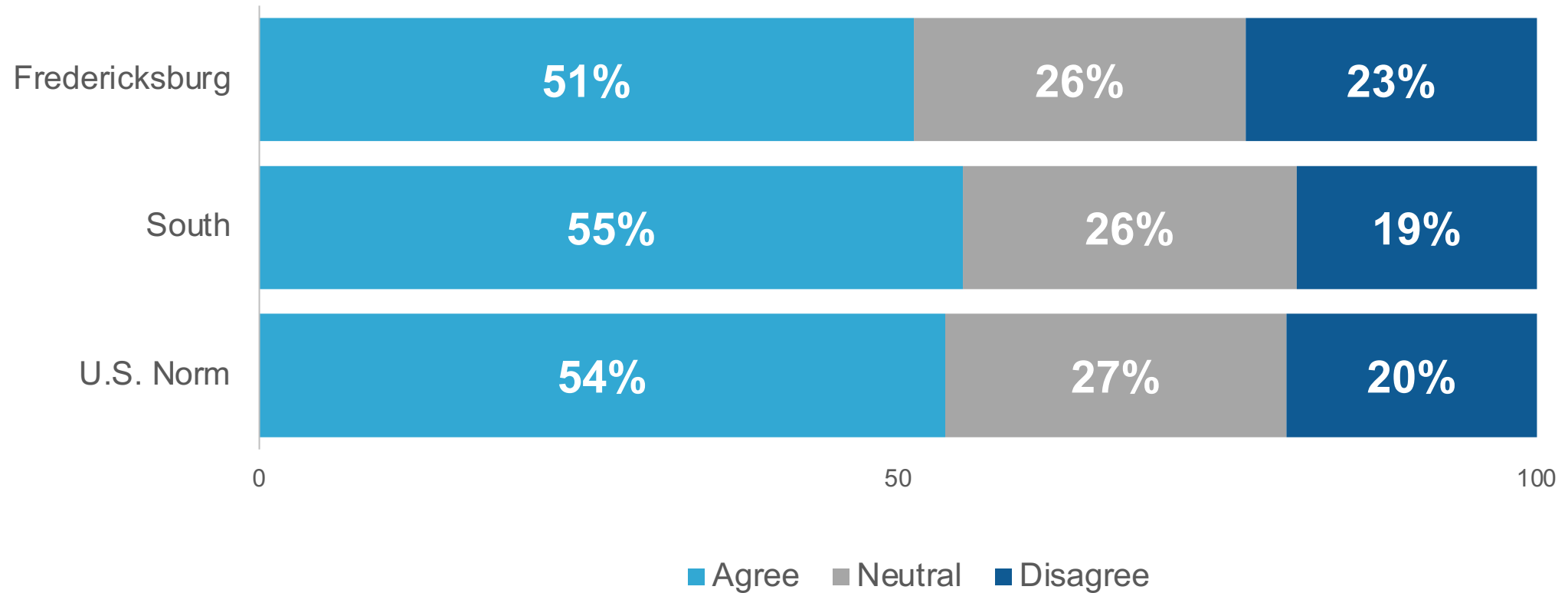


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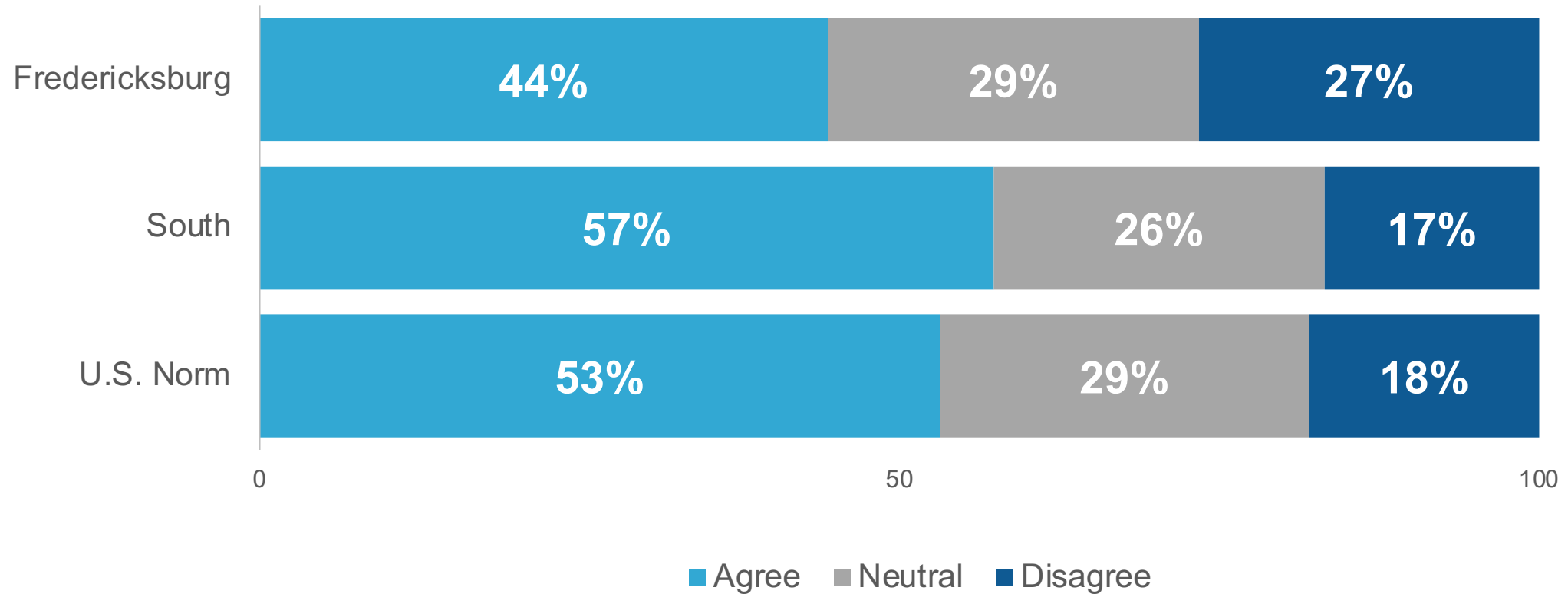
Economy

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## Tourism is important to my local economy

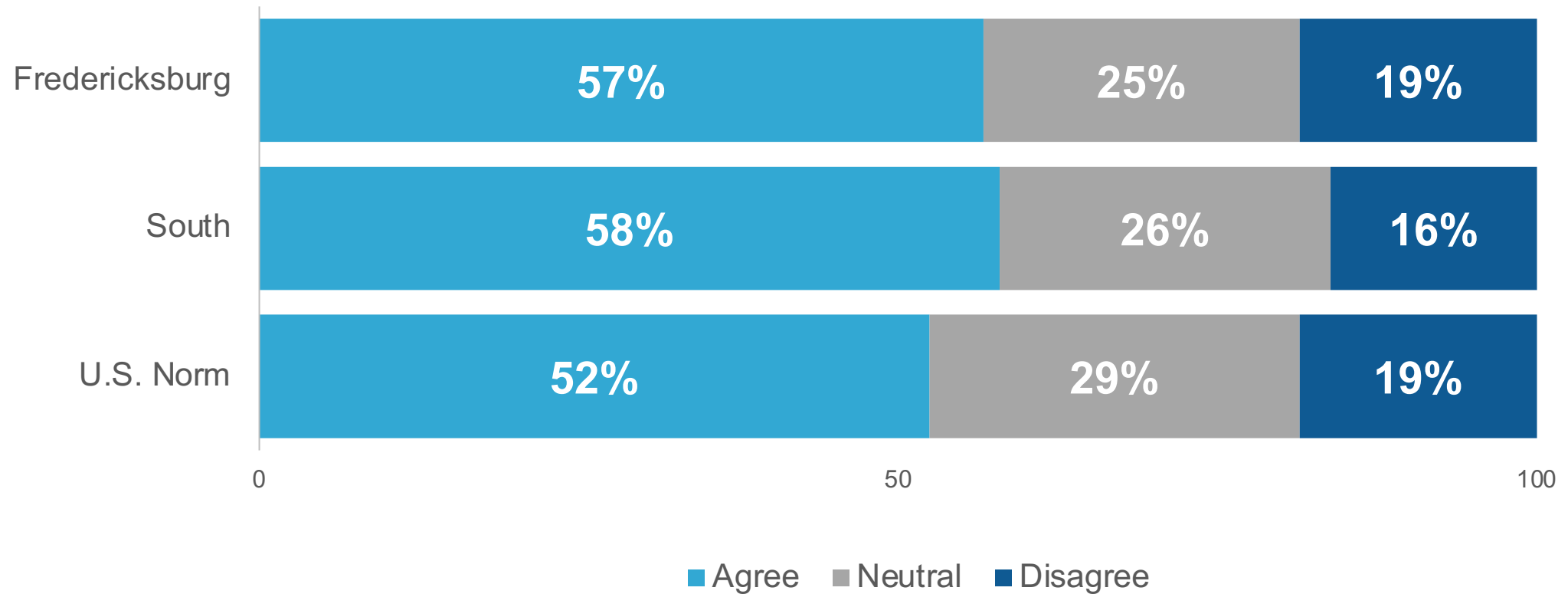


## Tourism encourages investment in our local economy

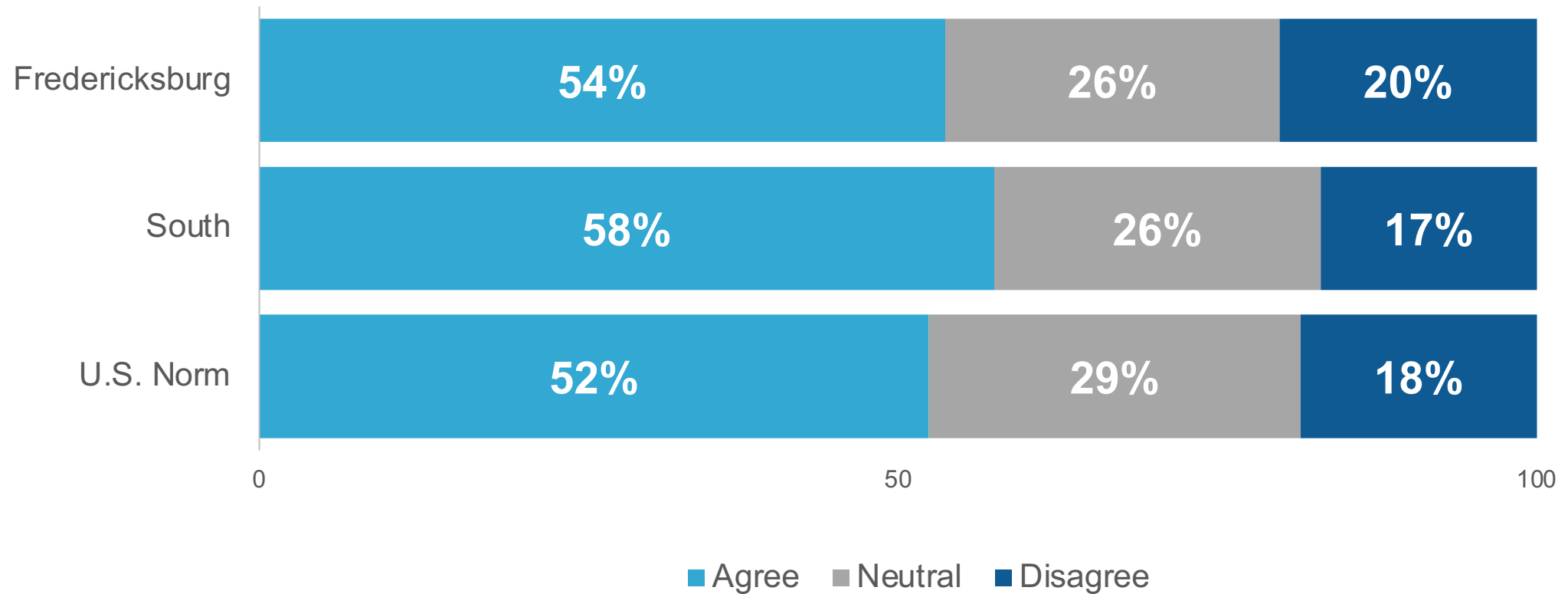




## Tourism attracts new residents to our local area

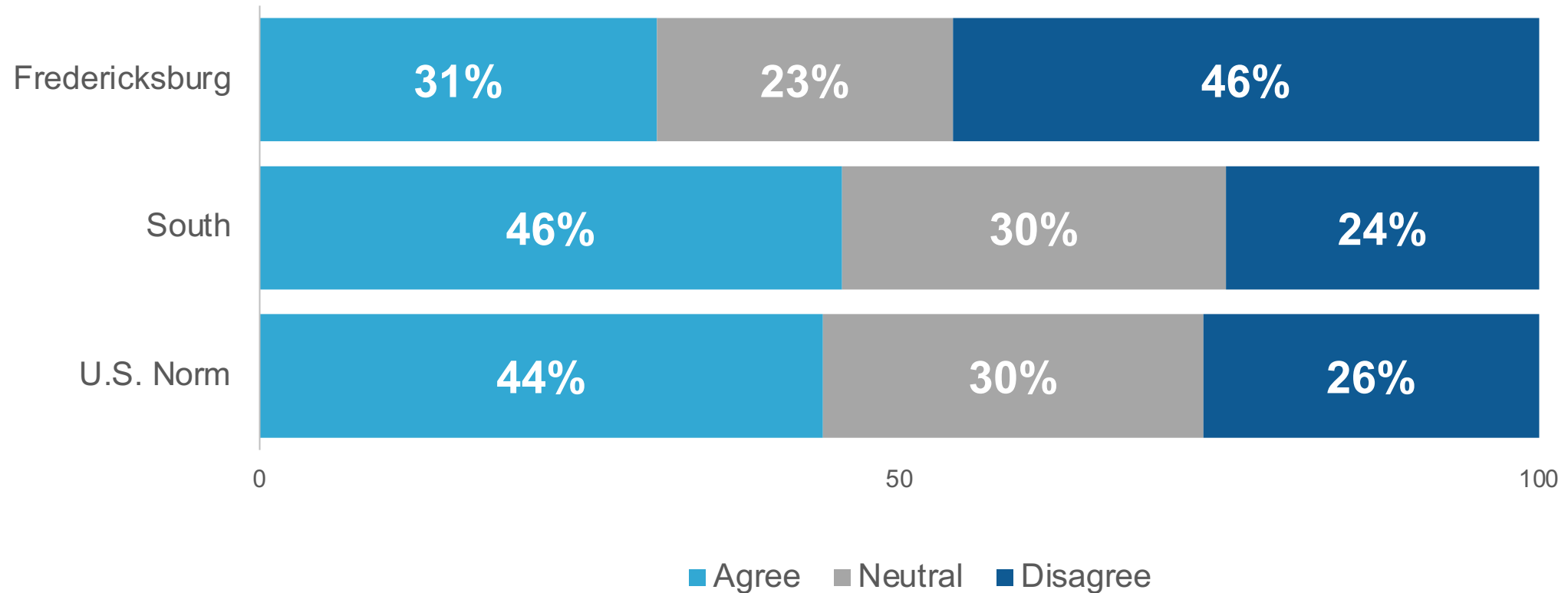


## Tourism attracts new businesses to our local area

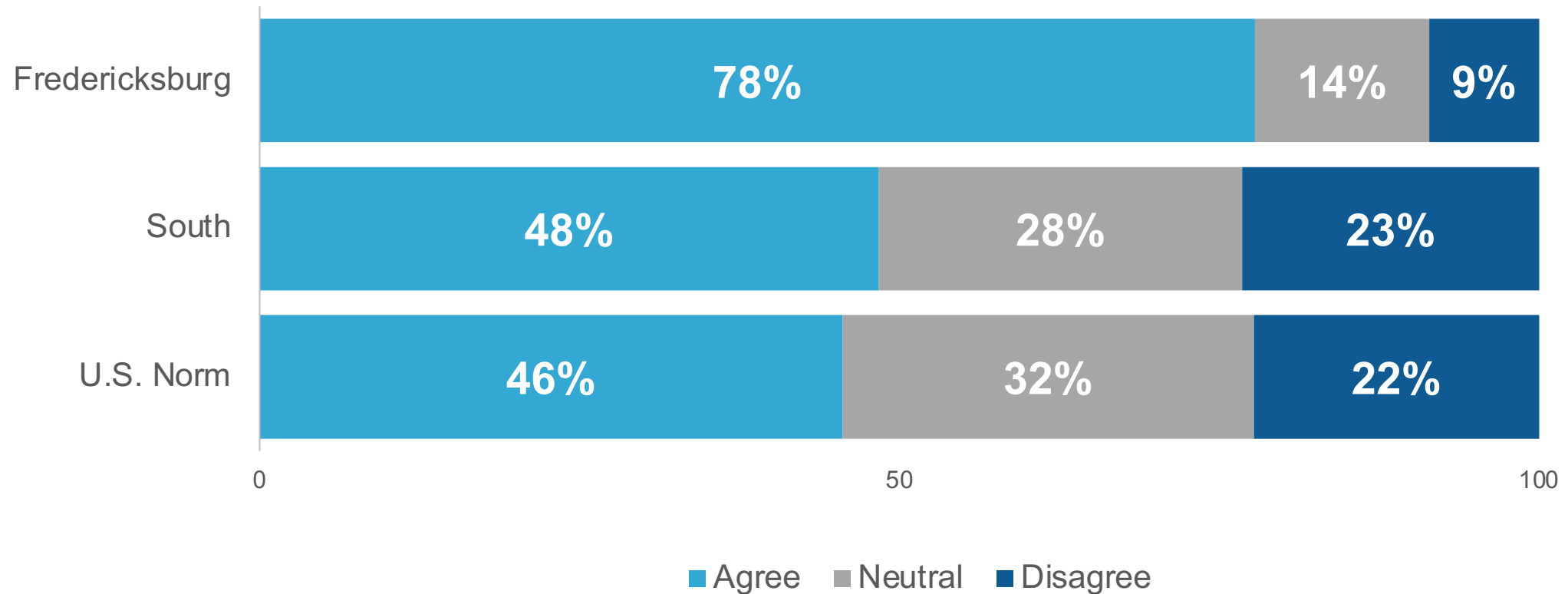


# Economy

**Without the tax revenues we get from tourists, we would have to pay higher state and local taxes for government programs and services**

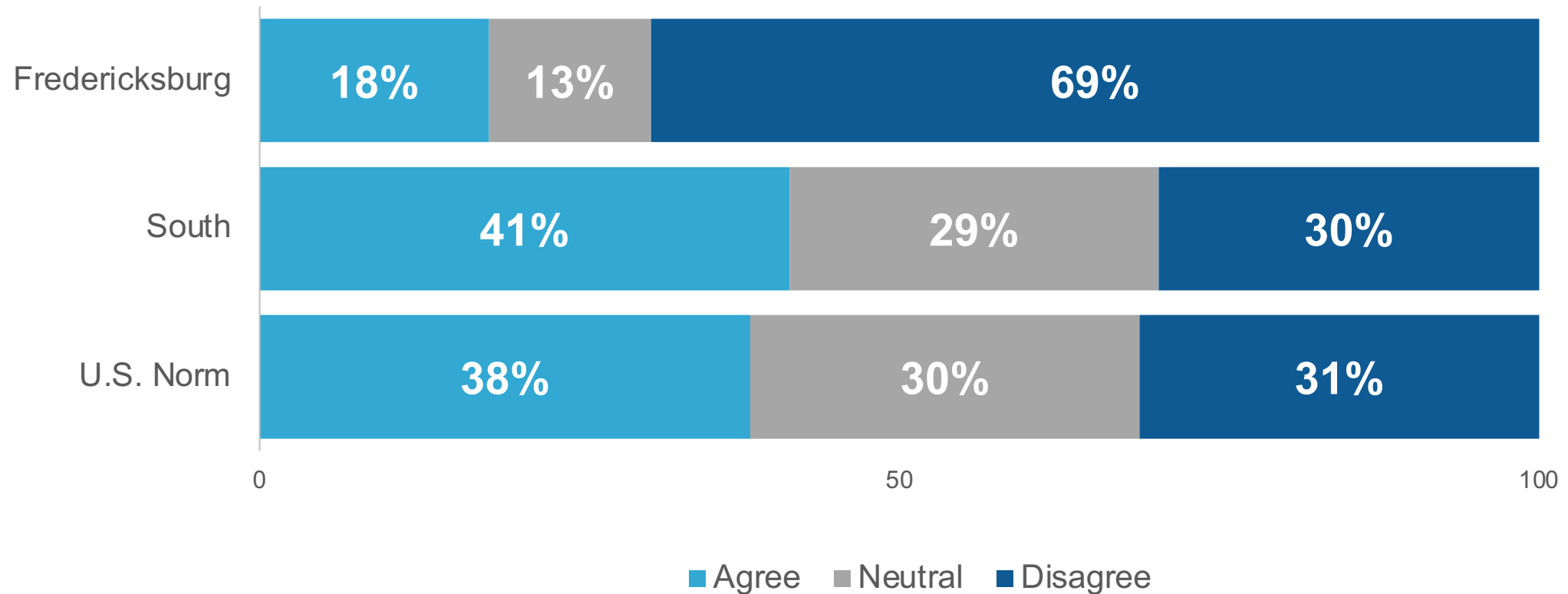


## Hotel/lodging taxes should be used to help pay for local services, not to promote more tourism



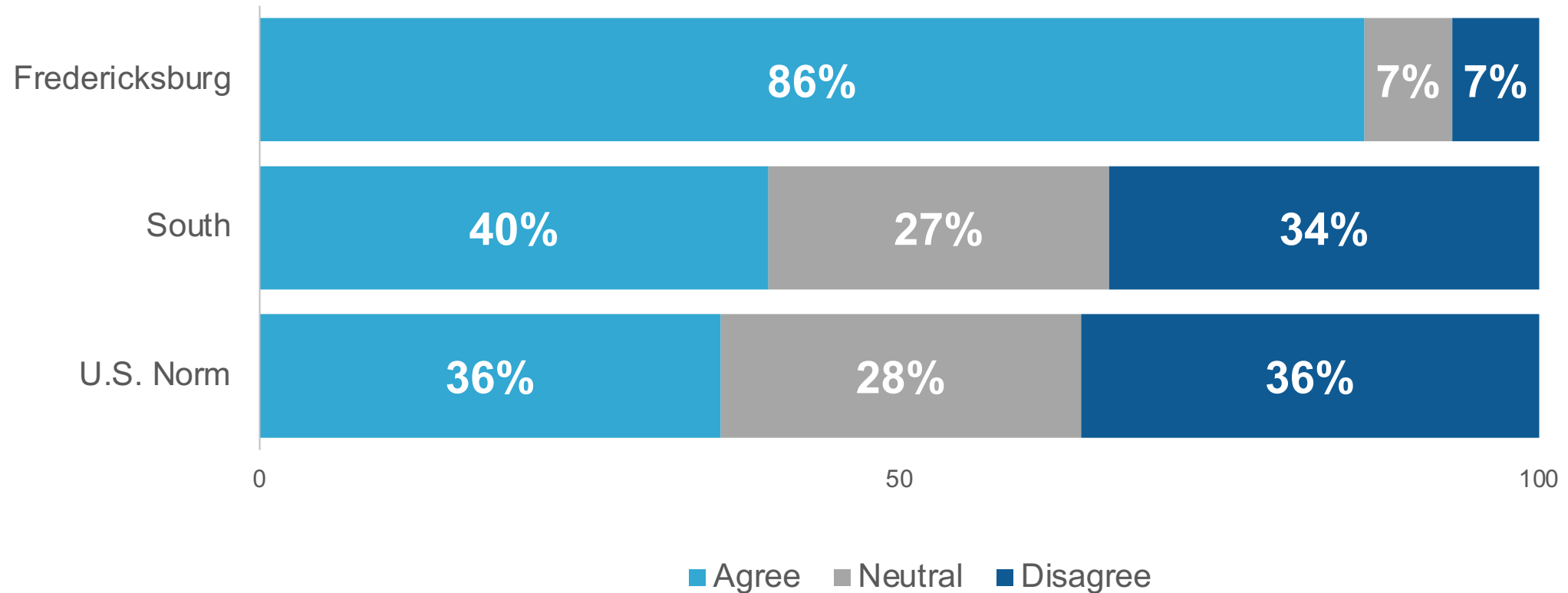
# Economy

**The sales tax that tourists pay on their purchases adequately compensates for the wear and tear they create on our infrastructure**



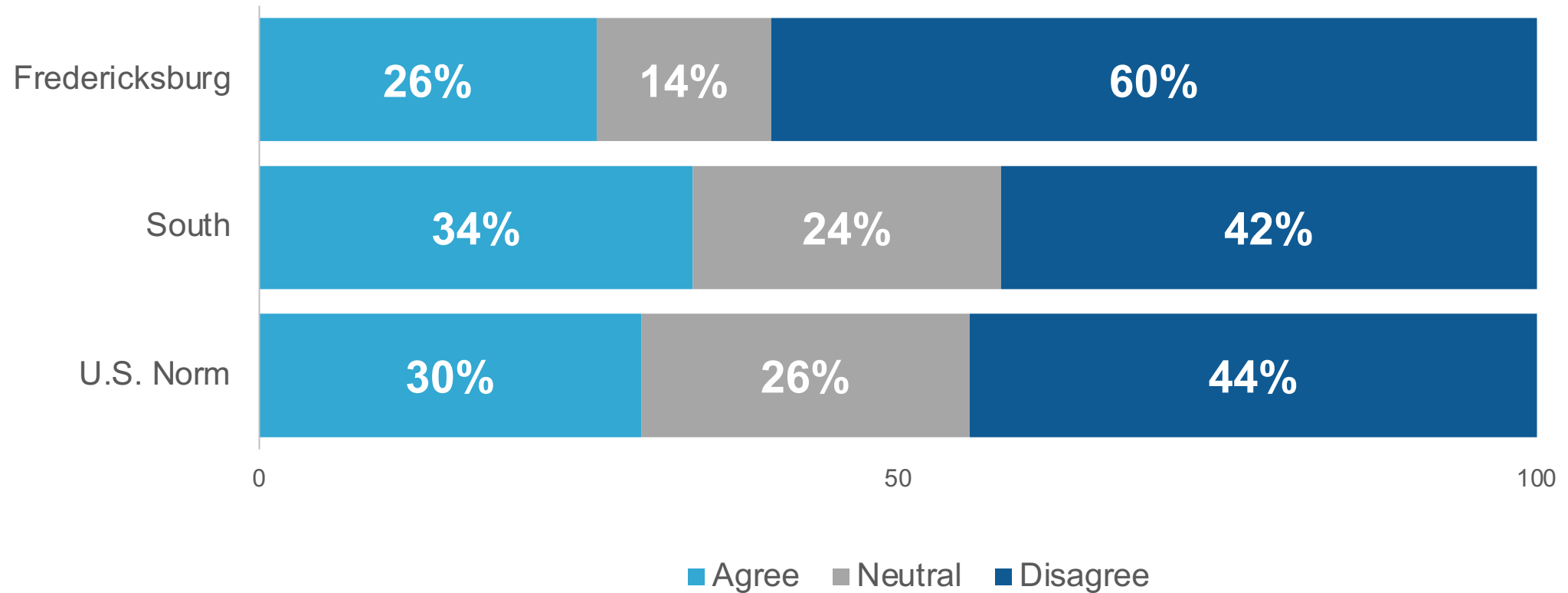
# Economy

**The growth in tourism is causing prices to rise, making things less affordable for residents**





## My household standard of living is higher because of the money tourists spend here





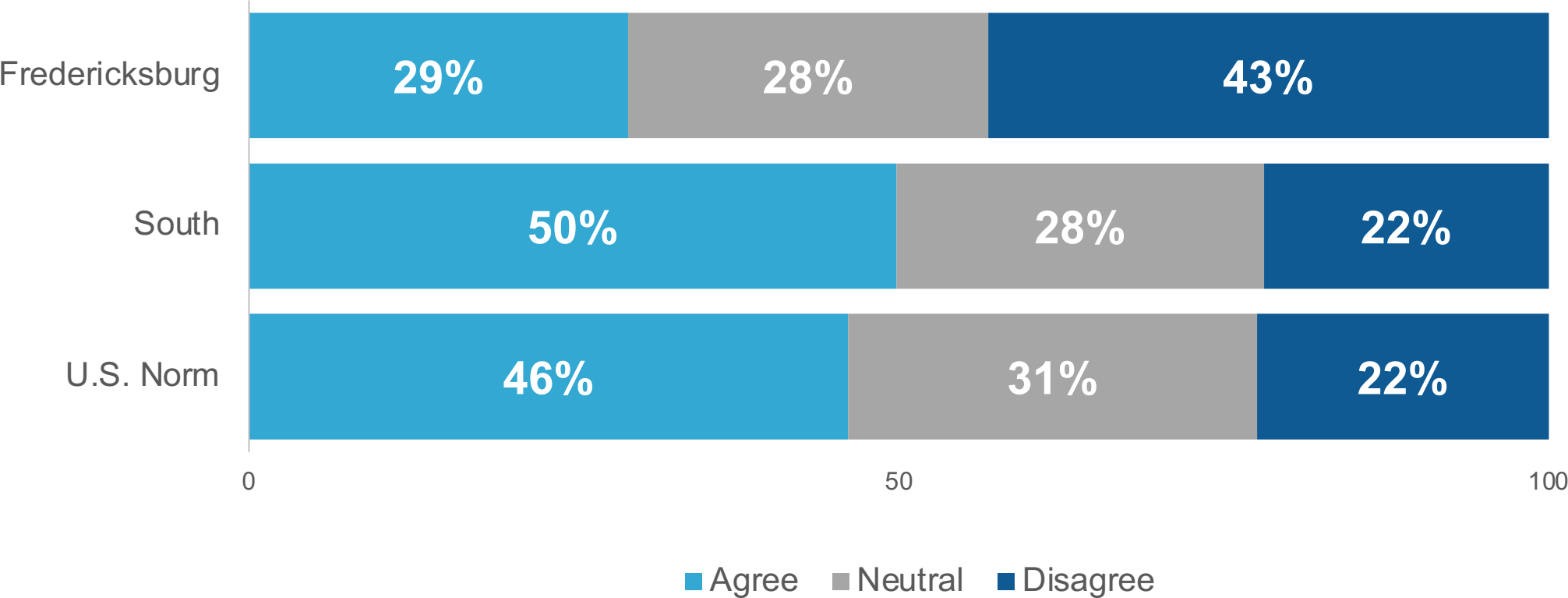
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## Tourism Employment

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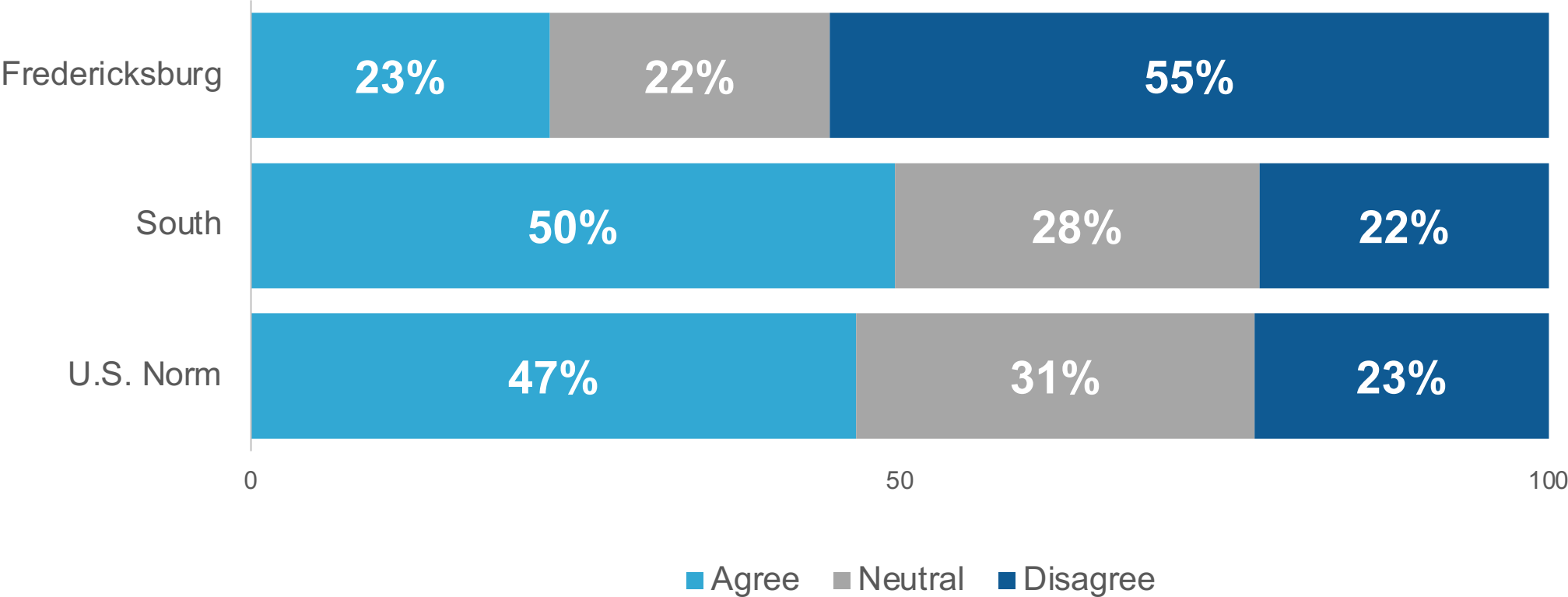
# Tourism Employment

There are opportunities for career advancement in the tourism industry



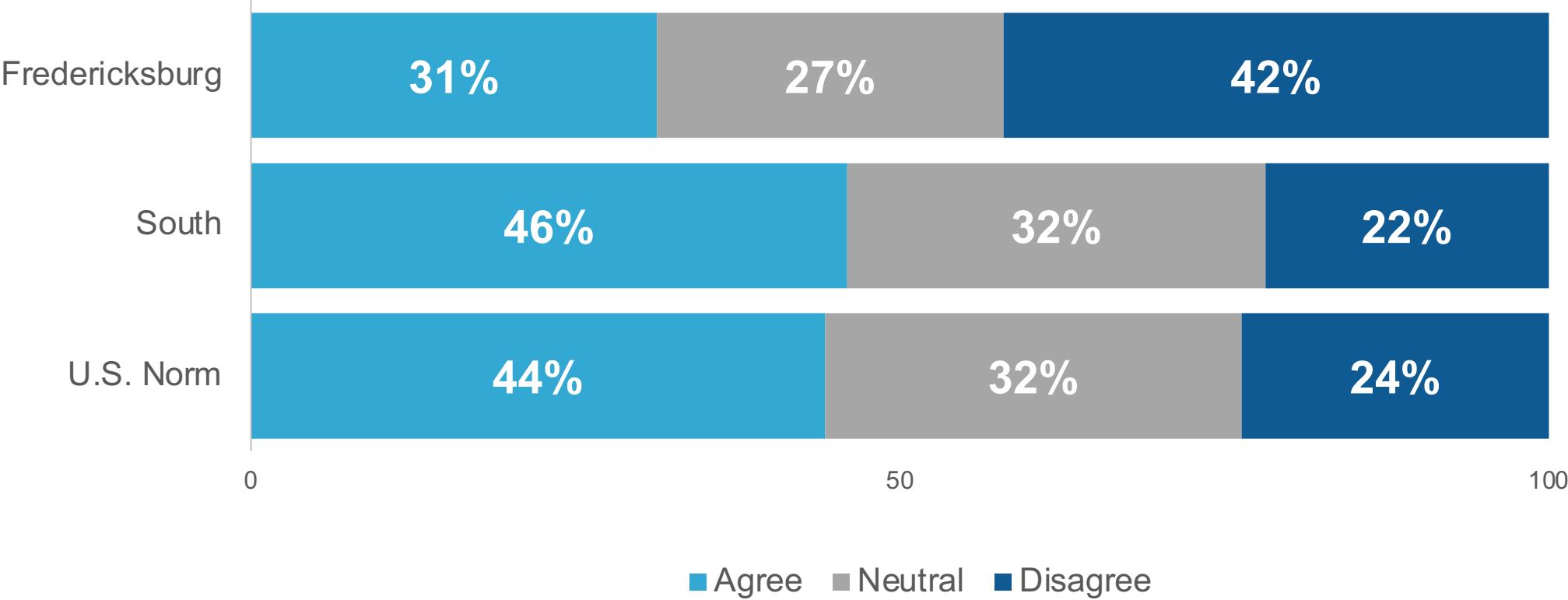
# Tourism Employment

## Tourism helps to recruit workforce to our local area



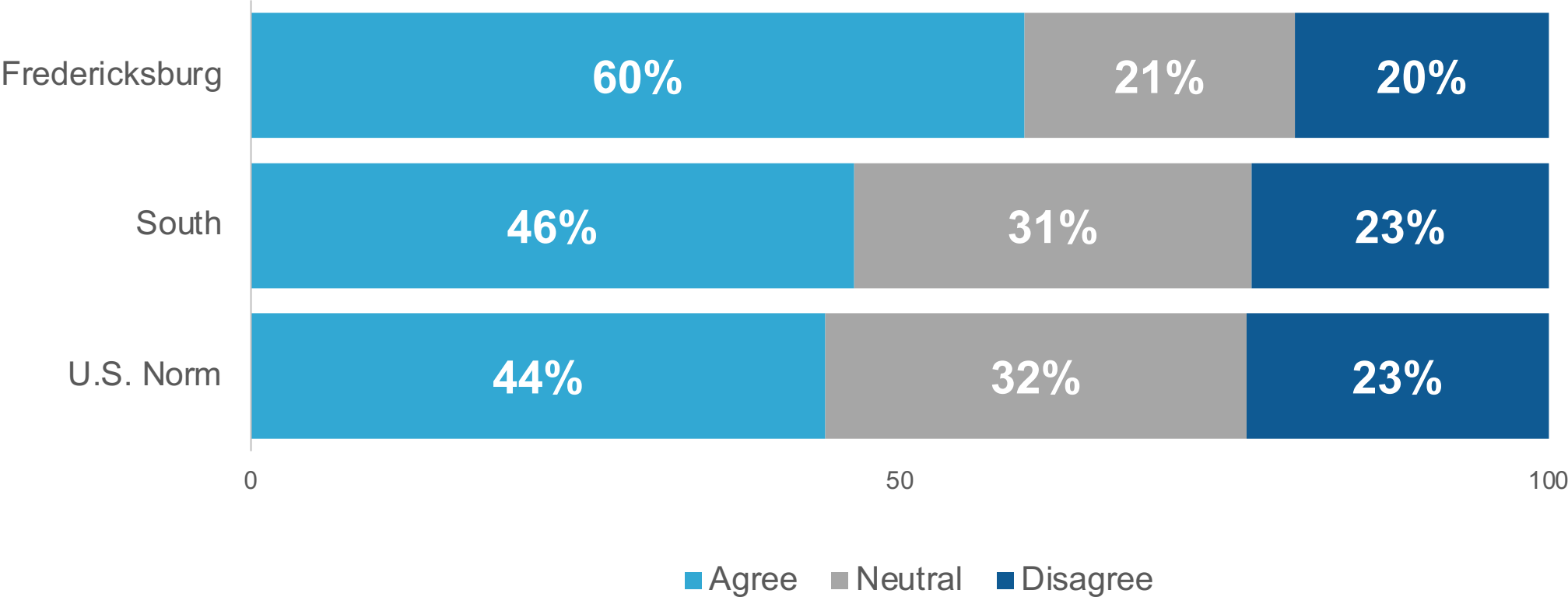
# Tourism Employment

**There are jobs in the tourism industry with desirable pay and benefits**



# Tourism Employment

Most jobs in the tourism industry are low-paying and seasonal







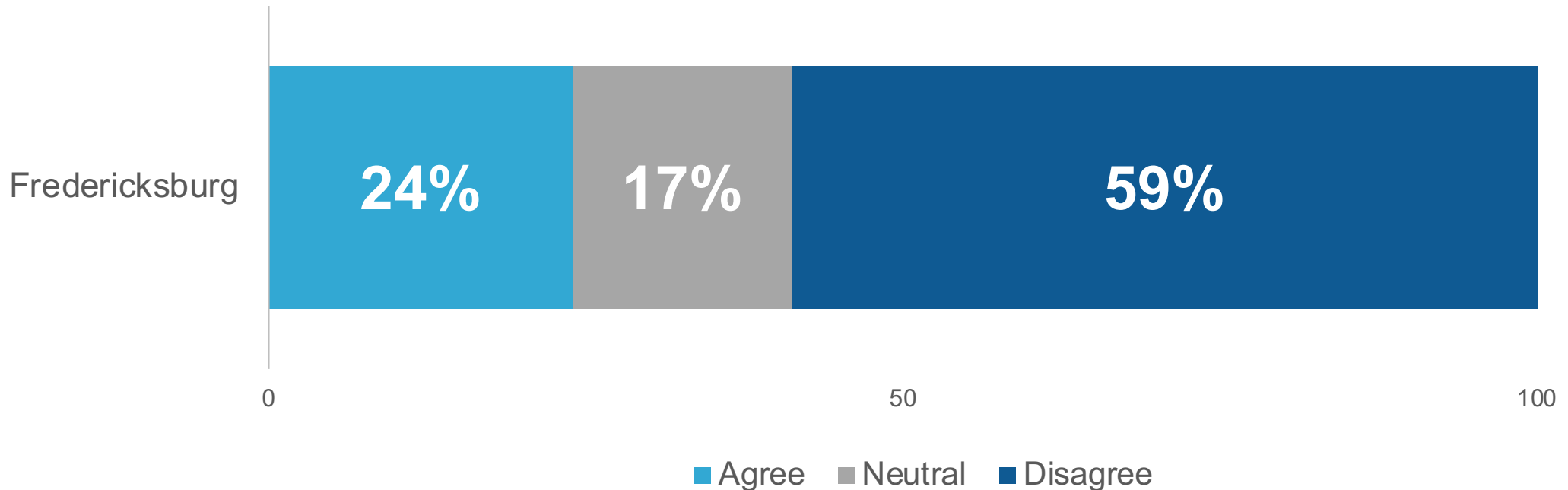
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Quality of Life

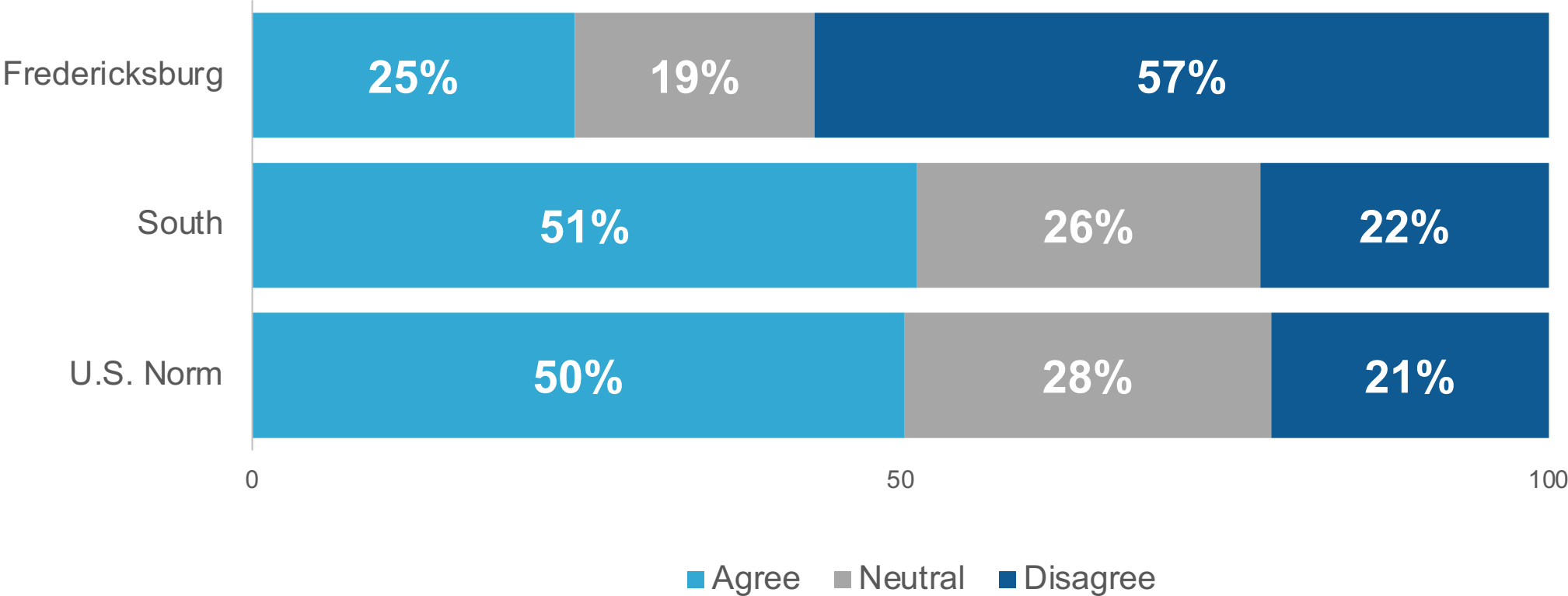
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# Quality of Life

**Quality of life in this area has improved because of increased tourism**

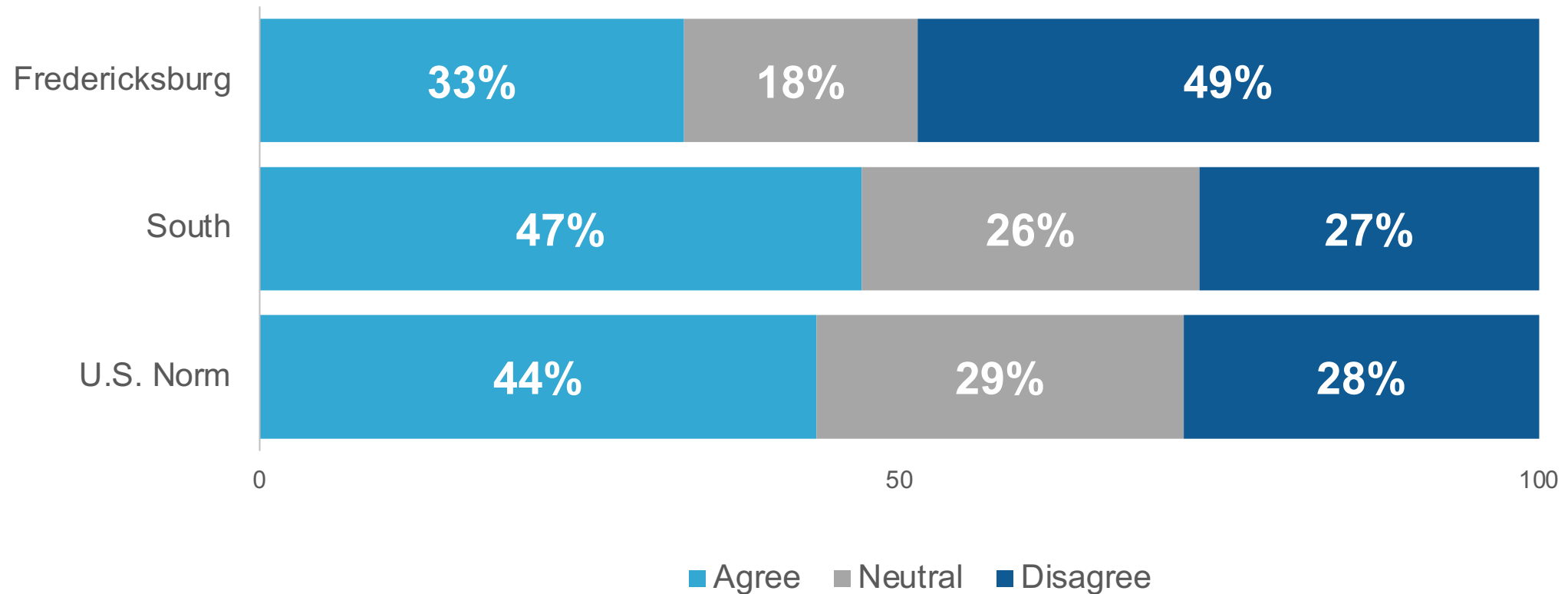


## Tourism supports the preservation of local culture and protects the community's authenticity

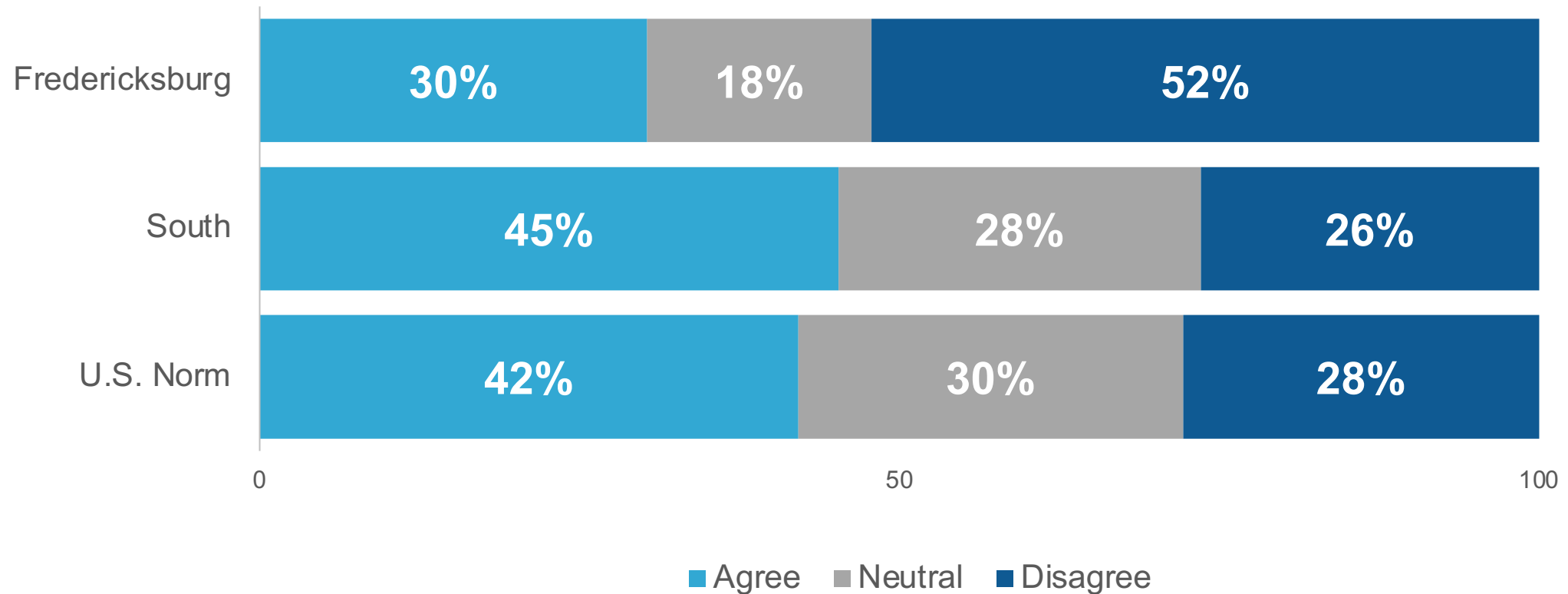


# Quality of Life

**I have more recreational opportunities (places to go and things to do) because of tourism in this area**

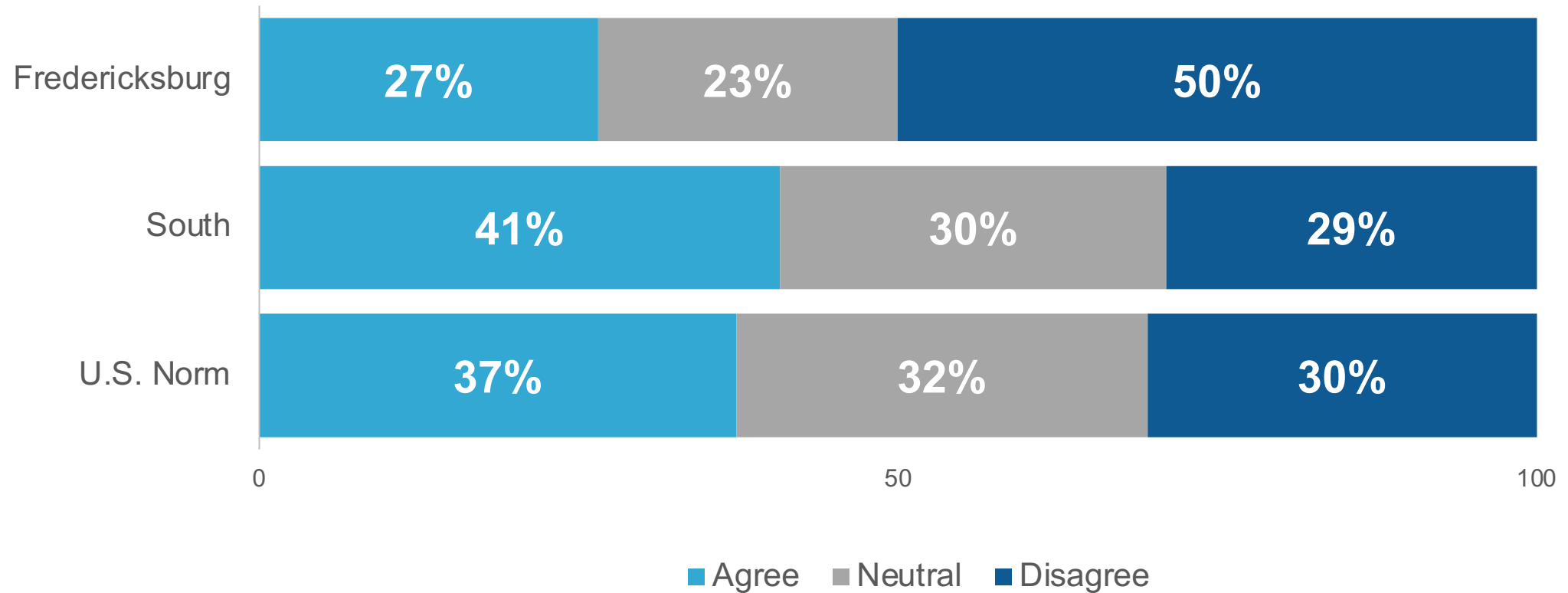


## Shopping opportunities are better here as a result of tourism



# Quality of Life

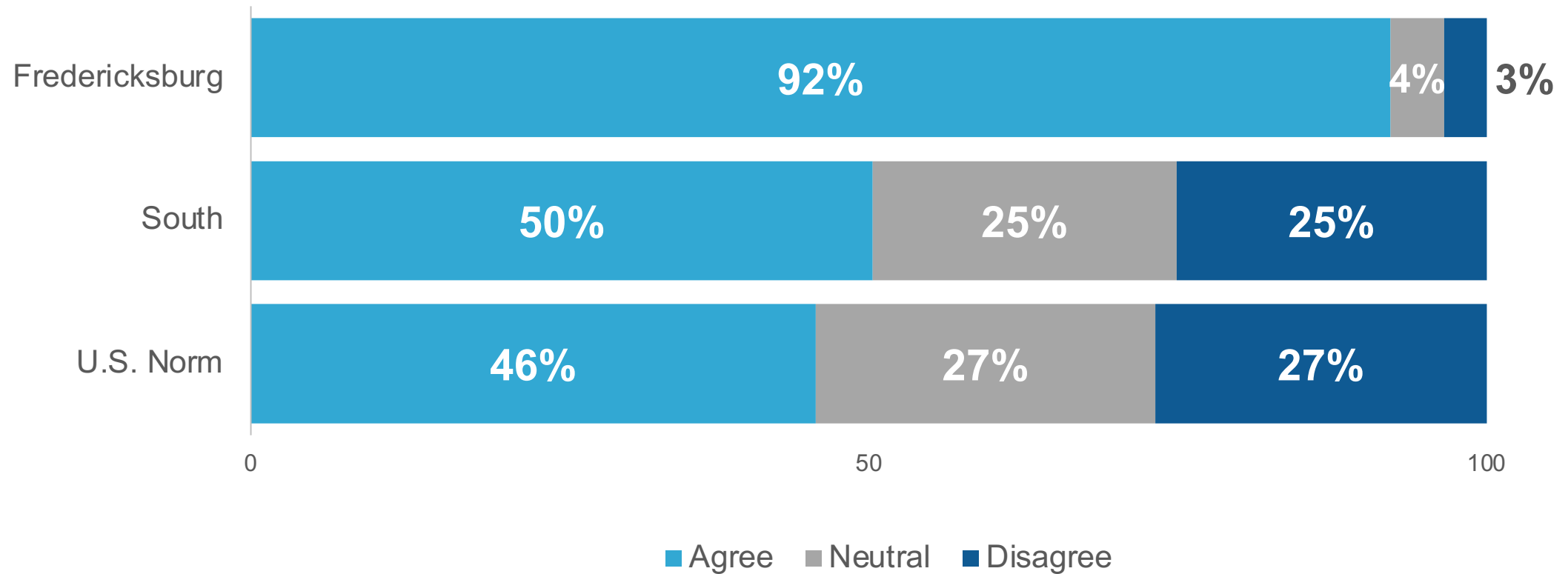
**The quality of public services has improved due to more tourism here**





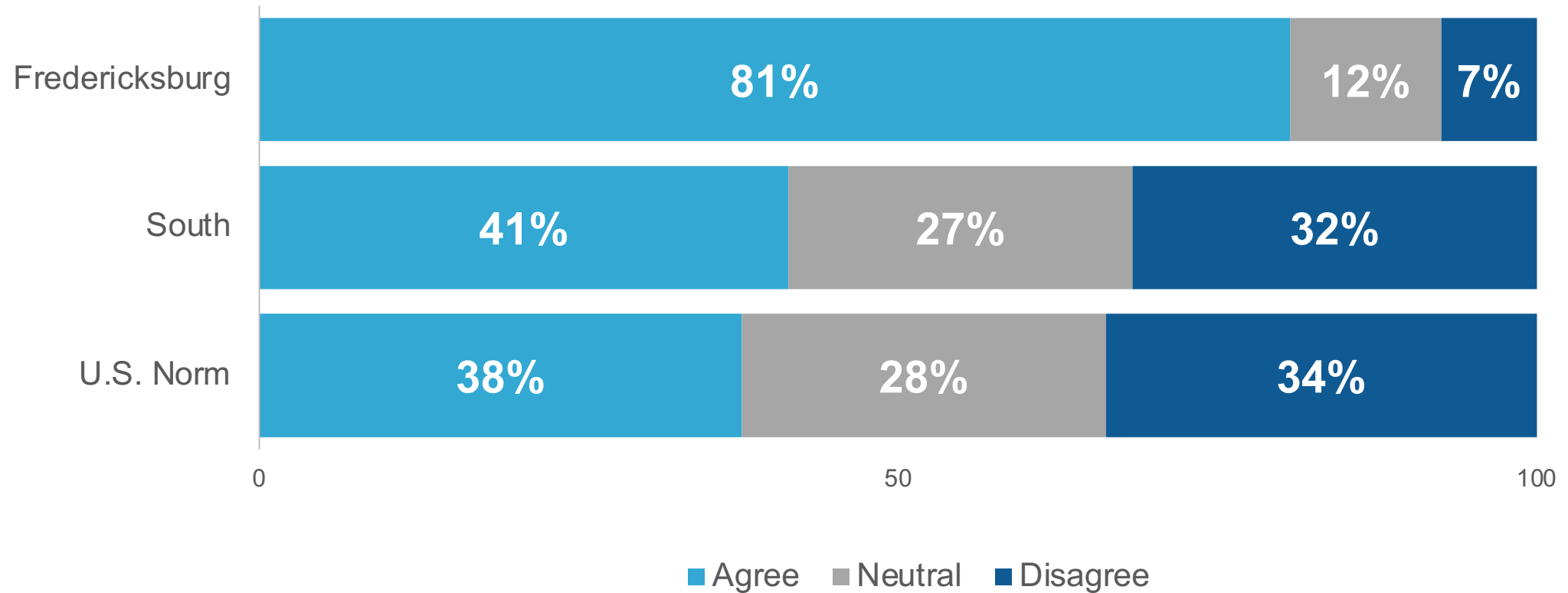
# Quality of Life

## Tourists add to traffic congestion and parking problems here



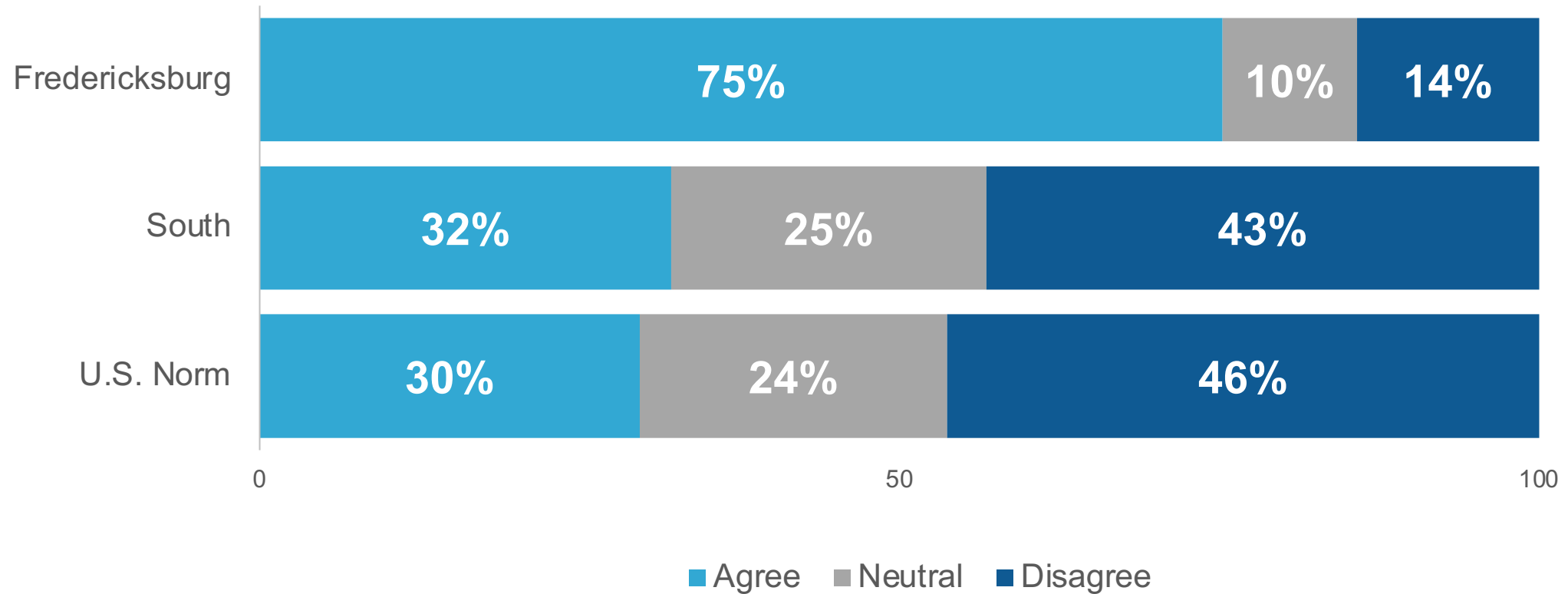
# Quality of Life

## Attractions and leisure facilities are becoming overcrowded because of more tourists



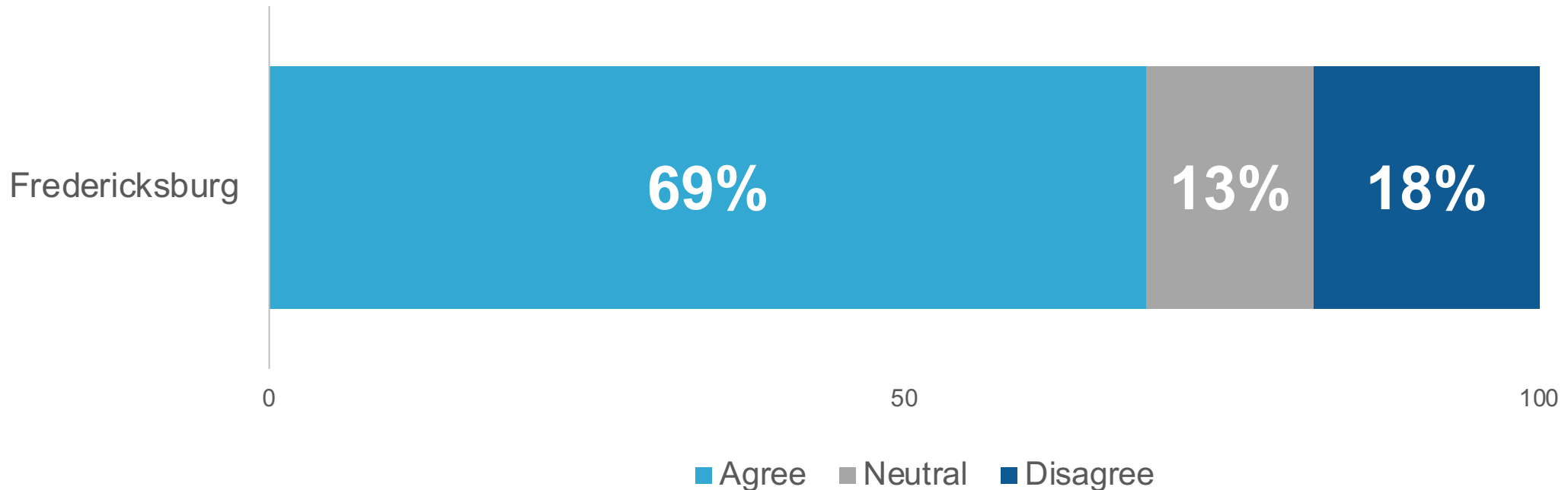
# Quality of Life

## Uncontrolled tourism growth is jeopardizing our heritage and culture



# Quality of Life

**Tourism has caused an increase in crime and social problems like alcohol and drug use in the community**

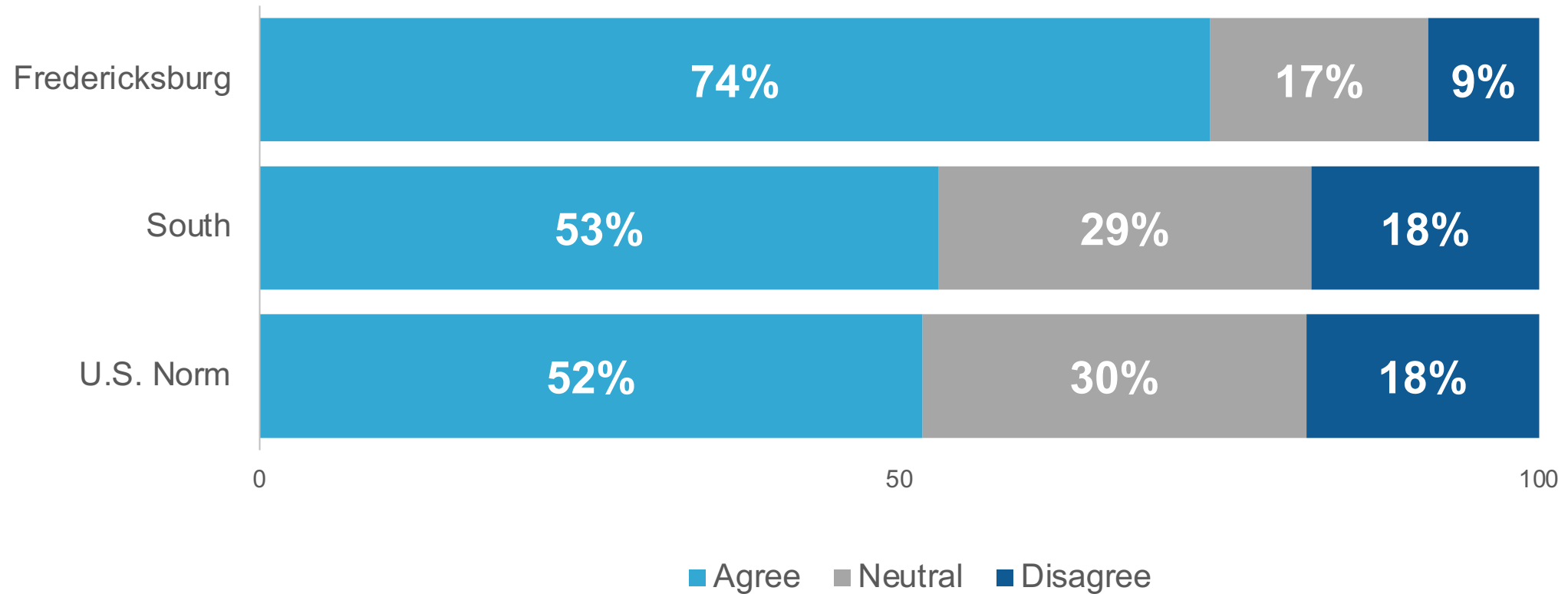




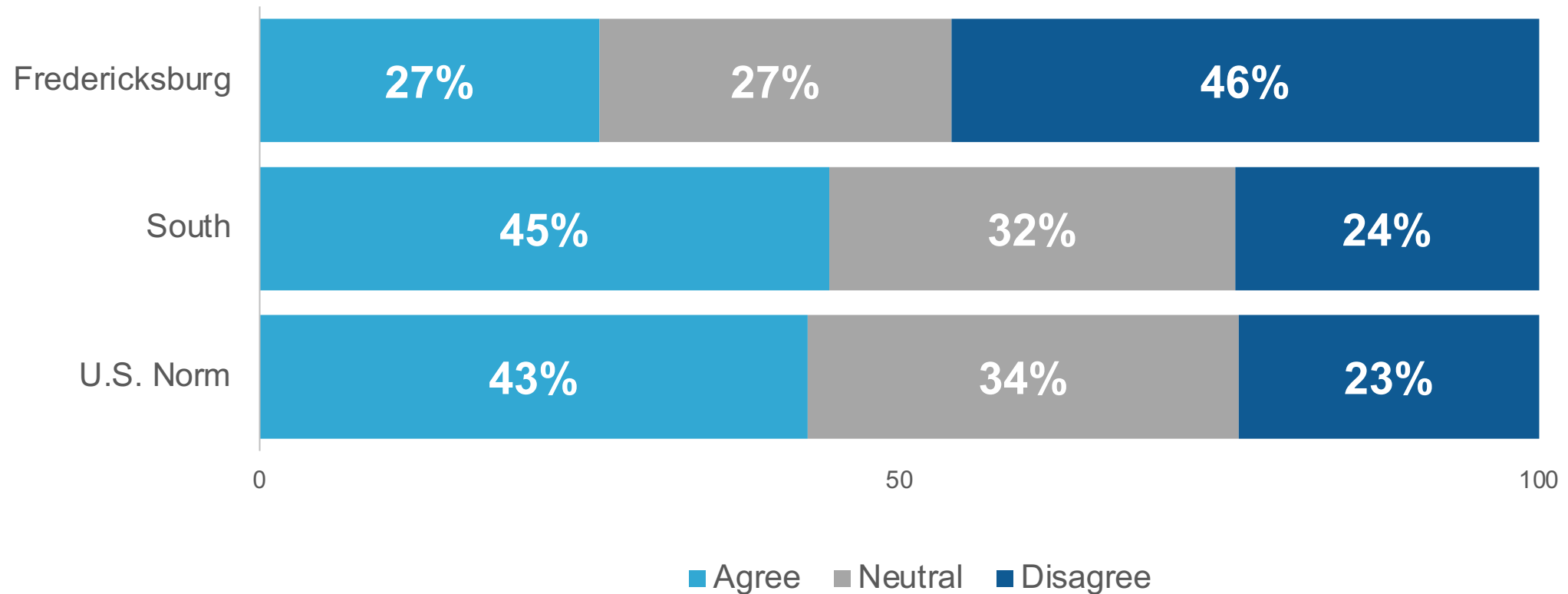
## Environment

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## Long-term planning can limit environmental impacts caused by tourism

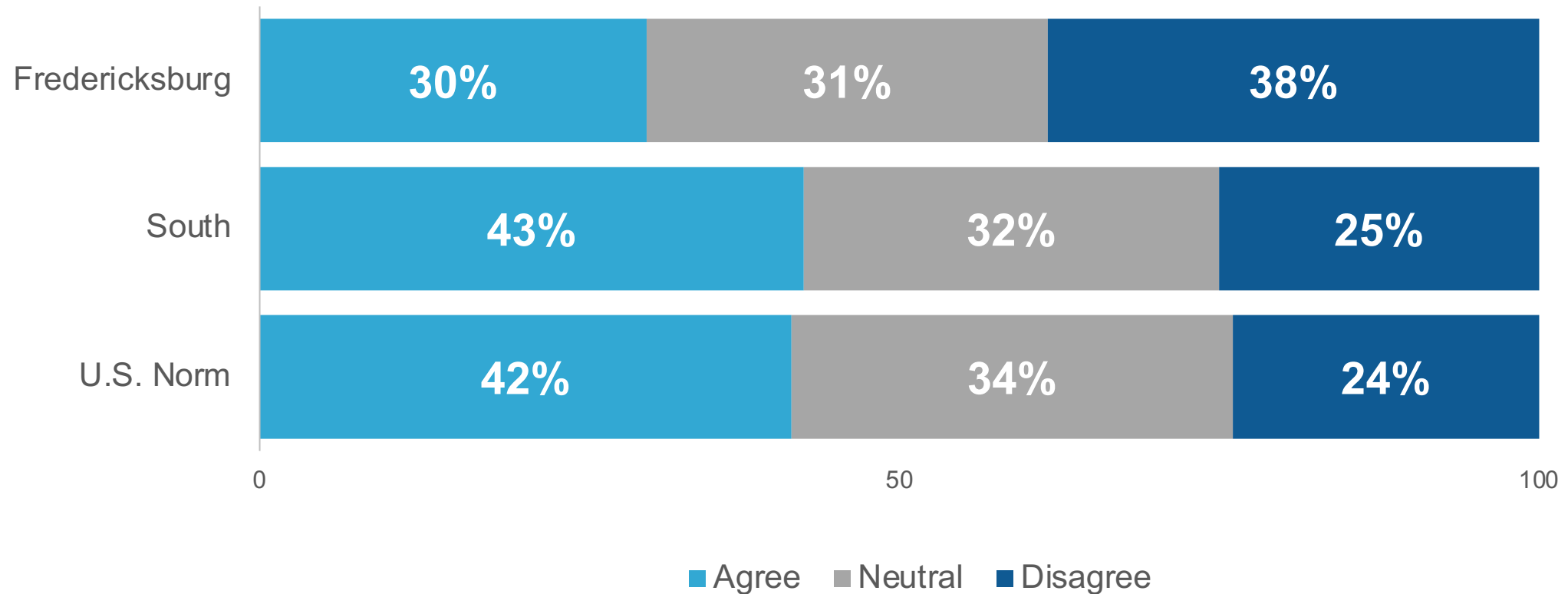


## Tourism can help the environment as local governments and people seek to protect sensitive and scenic areas

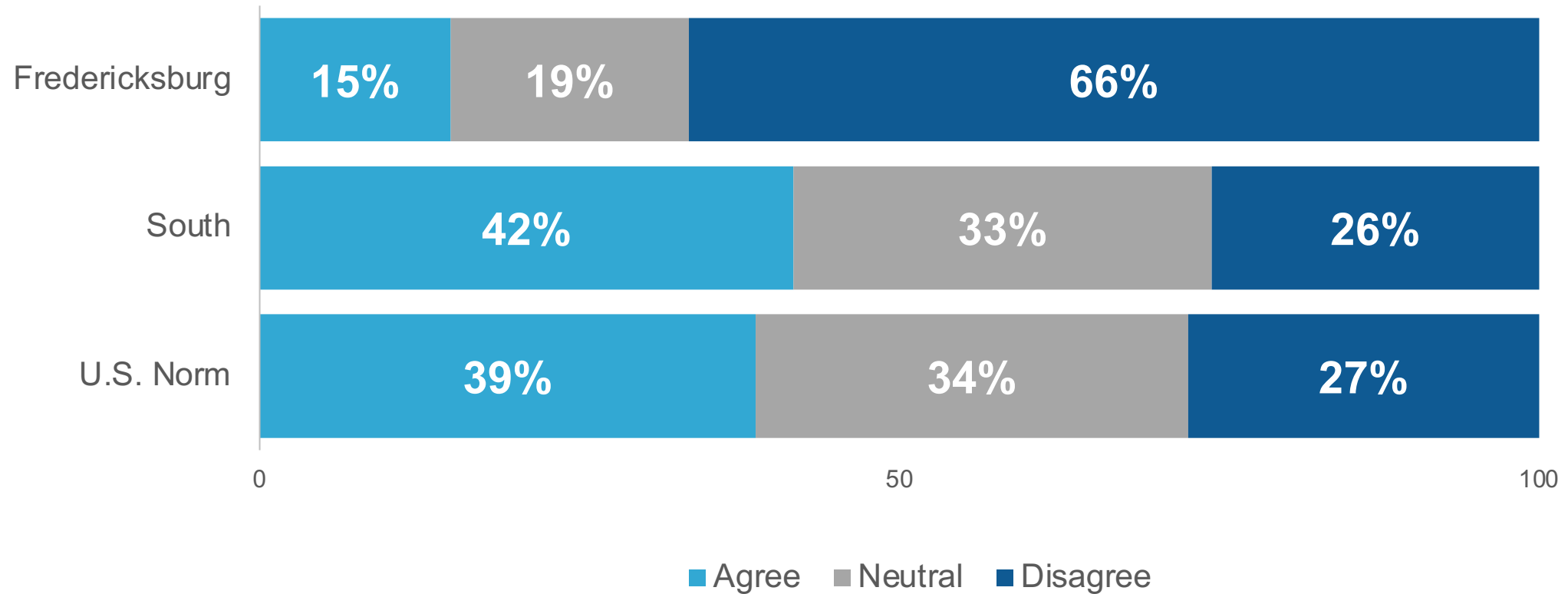




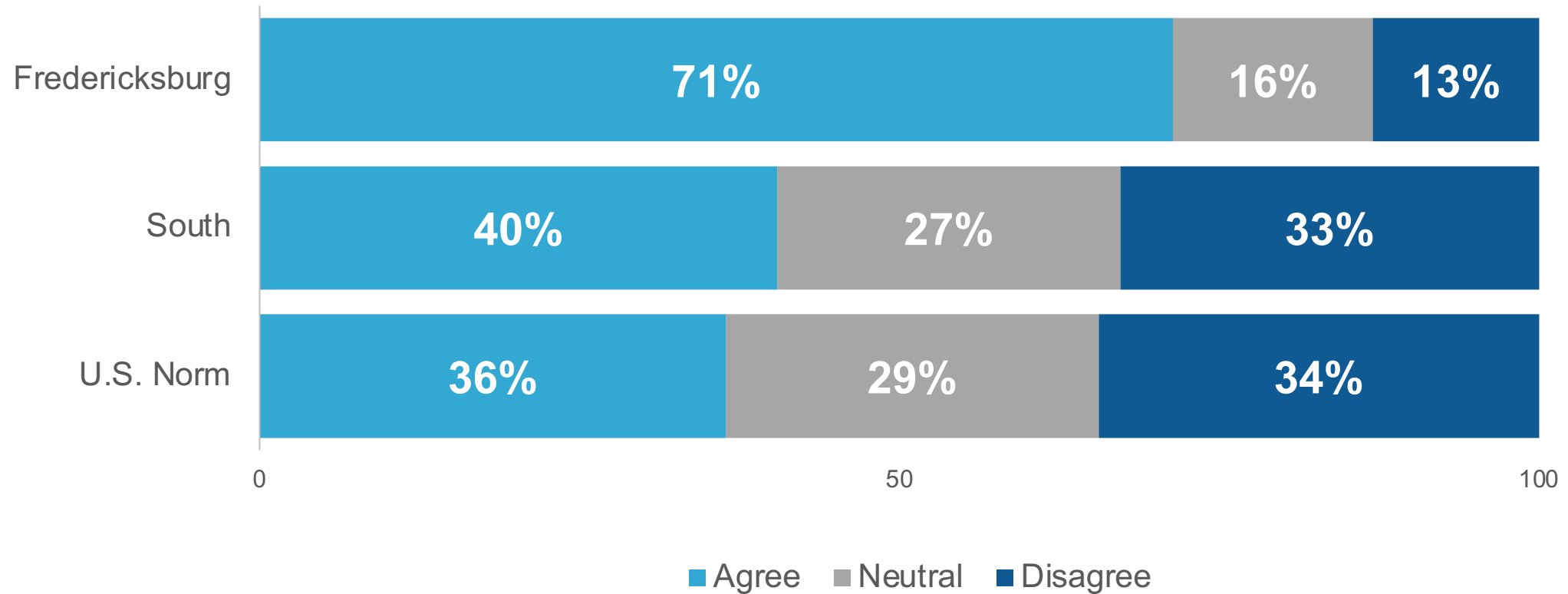
## Tourism is a good alternative to more environmentally-damaging development



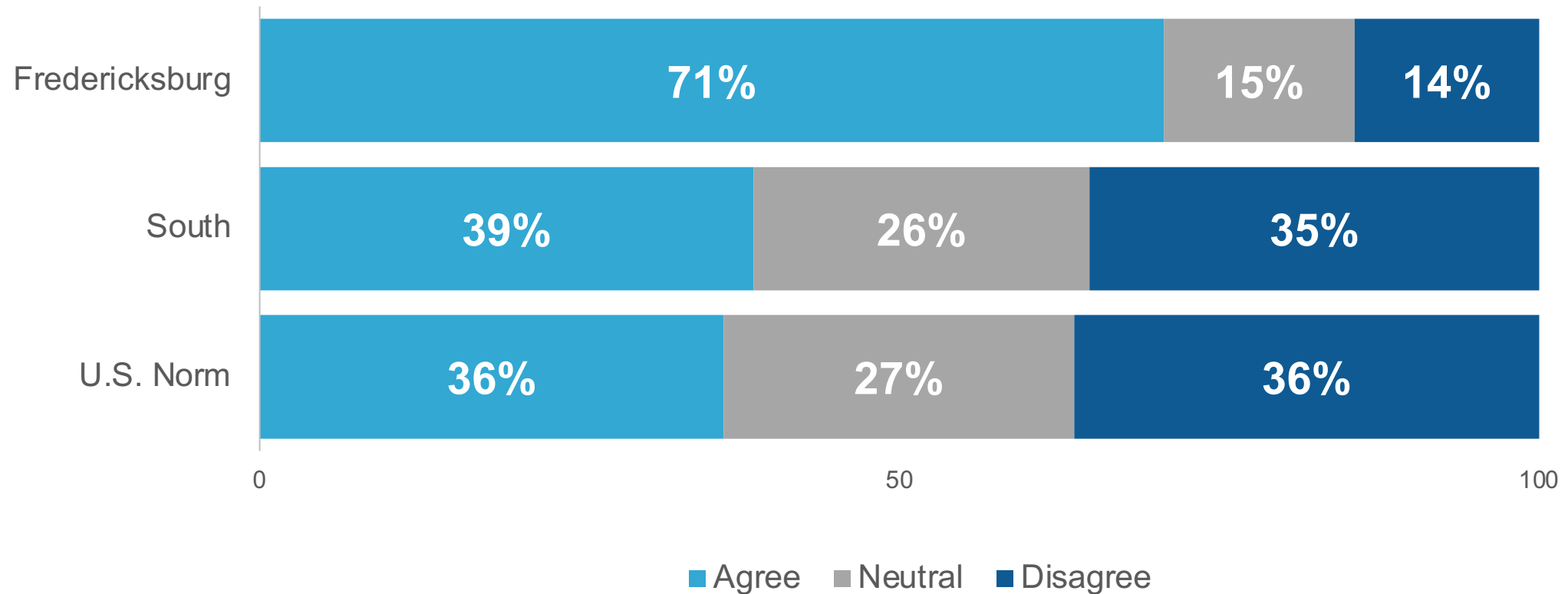
## The tourism industry values sustainability and our natural resources



## Overbuilding of tourism-related businesses is spoiling our natural areas



## Overcrowding by tourists is spoiling our natural areas





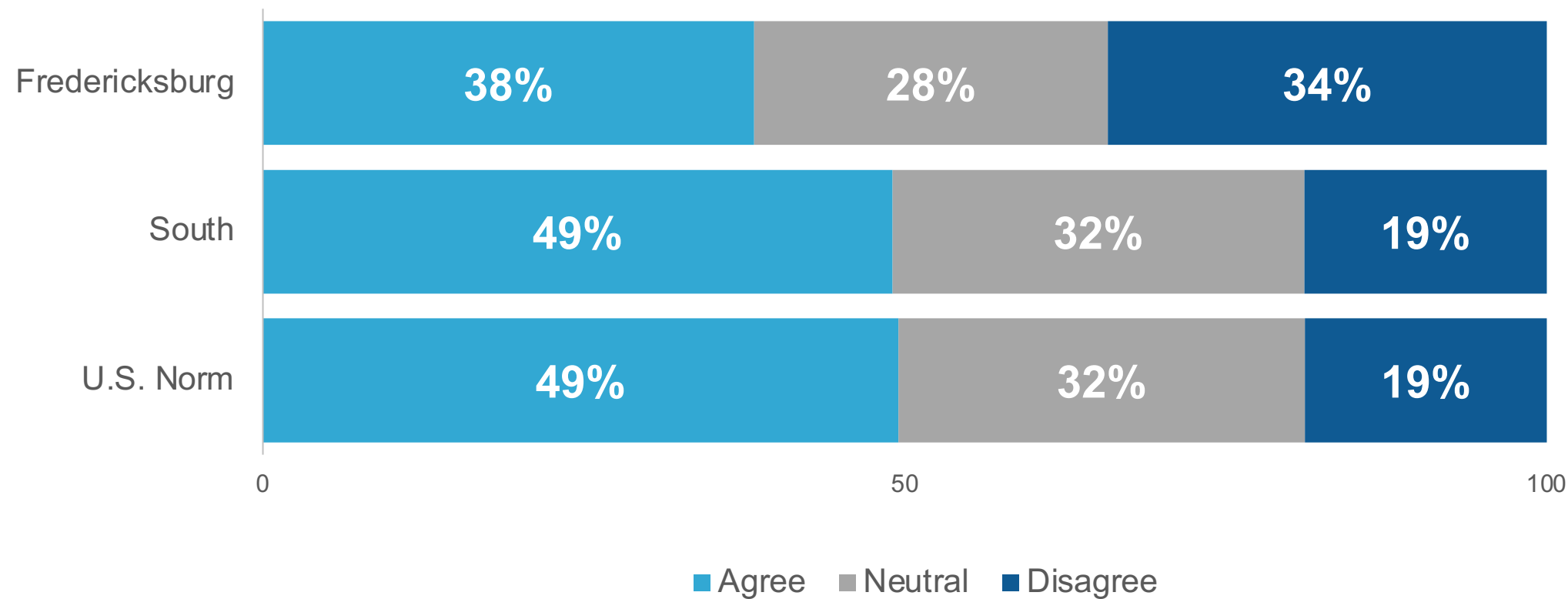
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## Accommodation- Sharing Services

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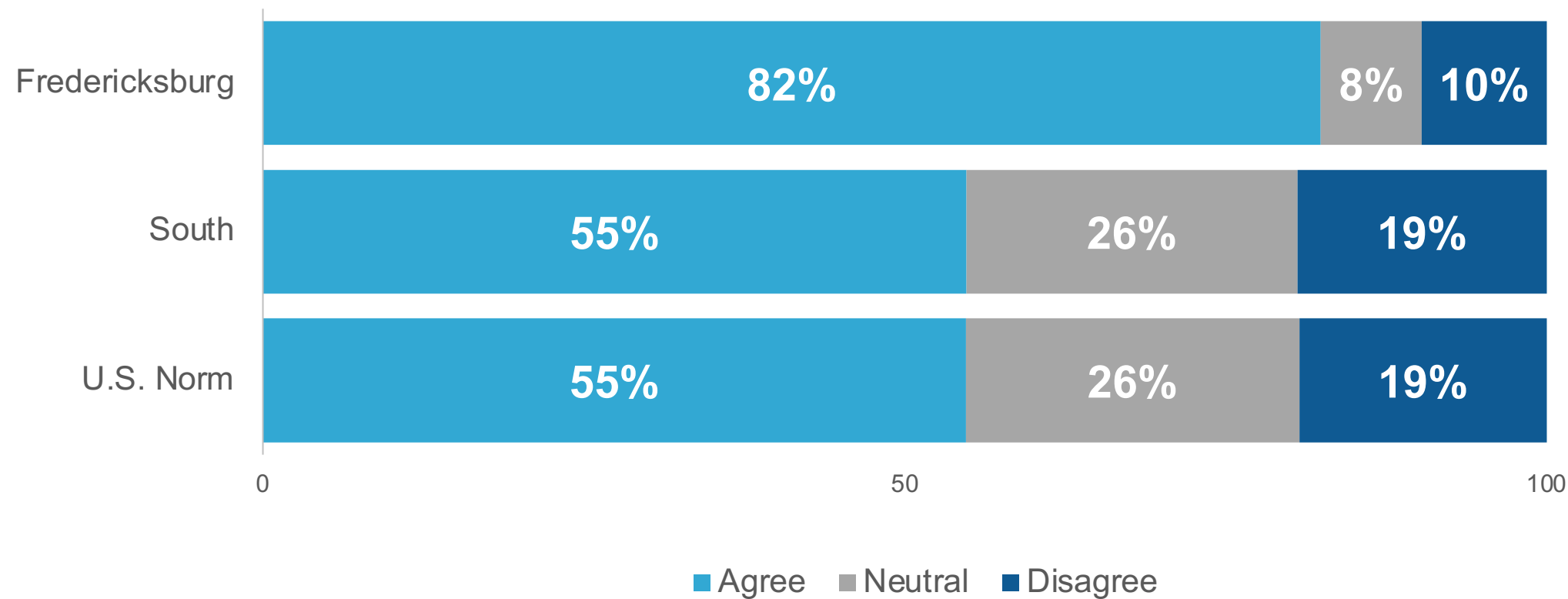
# Accommodation-Sharing Services

Accommodation-sharing services like Airbnb, Vrbo, etc., provide visitors with the opportunity to experience local cultures



# Accommodation-Sharing Services

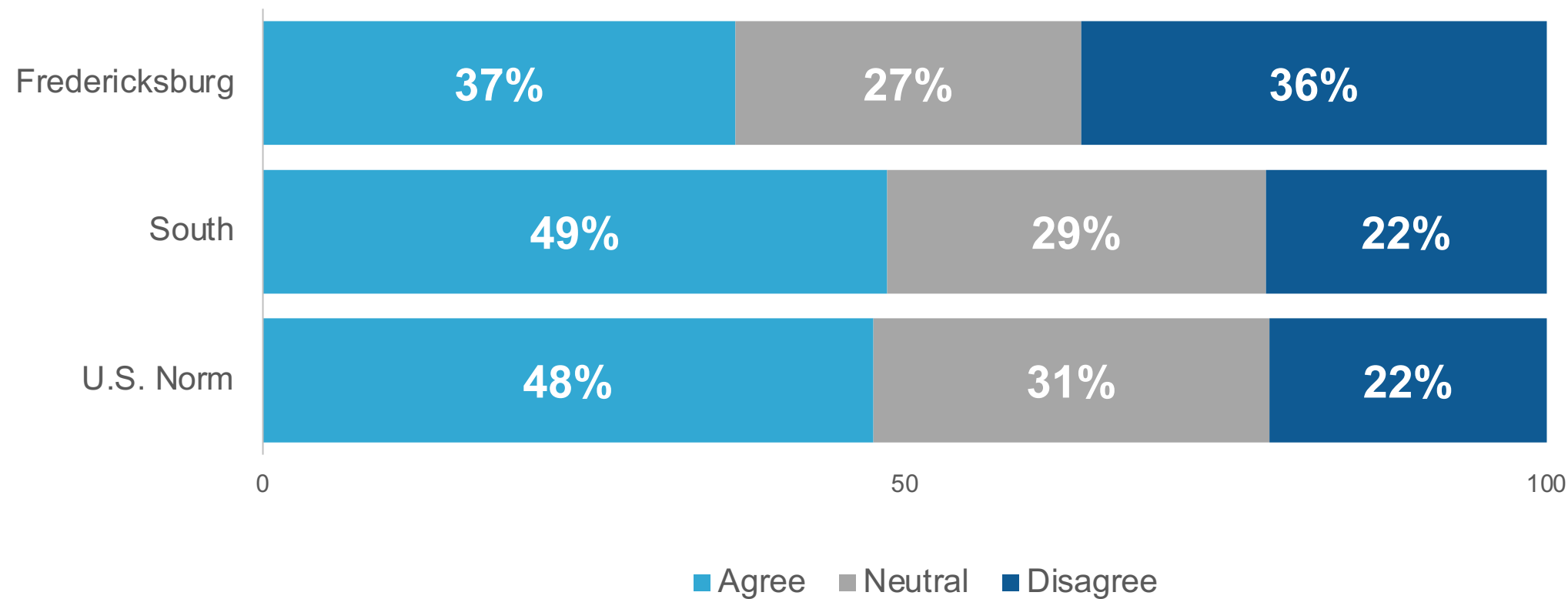
**Accommodation-sharing services like Airbnb should be regulated, just like hotels and other property-rental businesses**





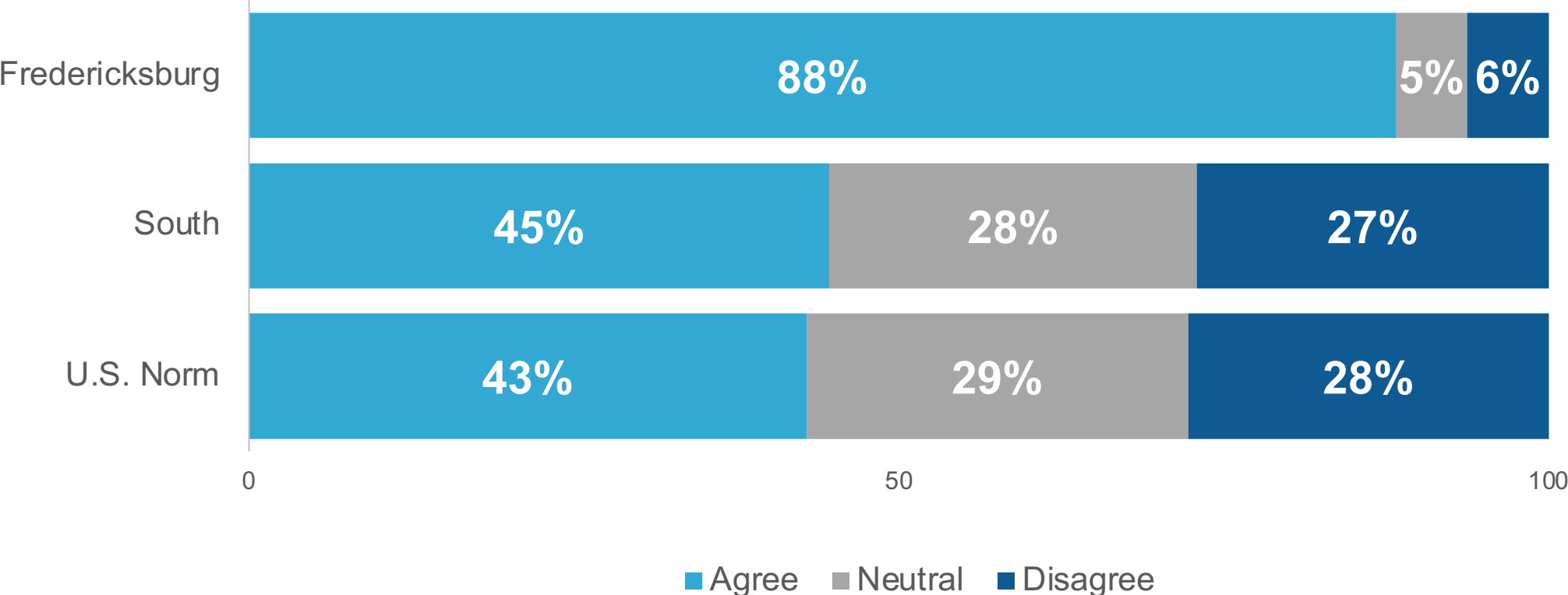
# Accommodation-Sharing Services

Accommodation-sharing services like Airbnb, Vrbo, etc., provide economic opportunities for residents



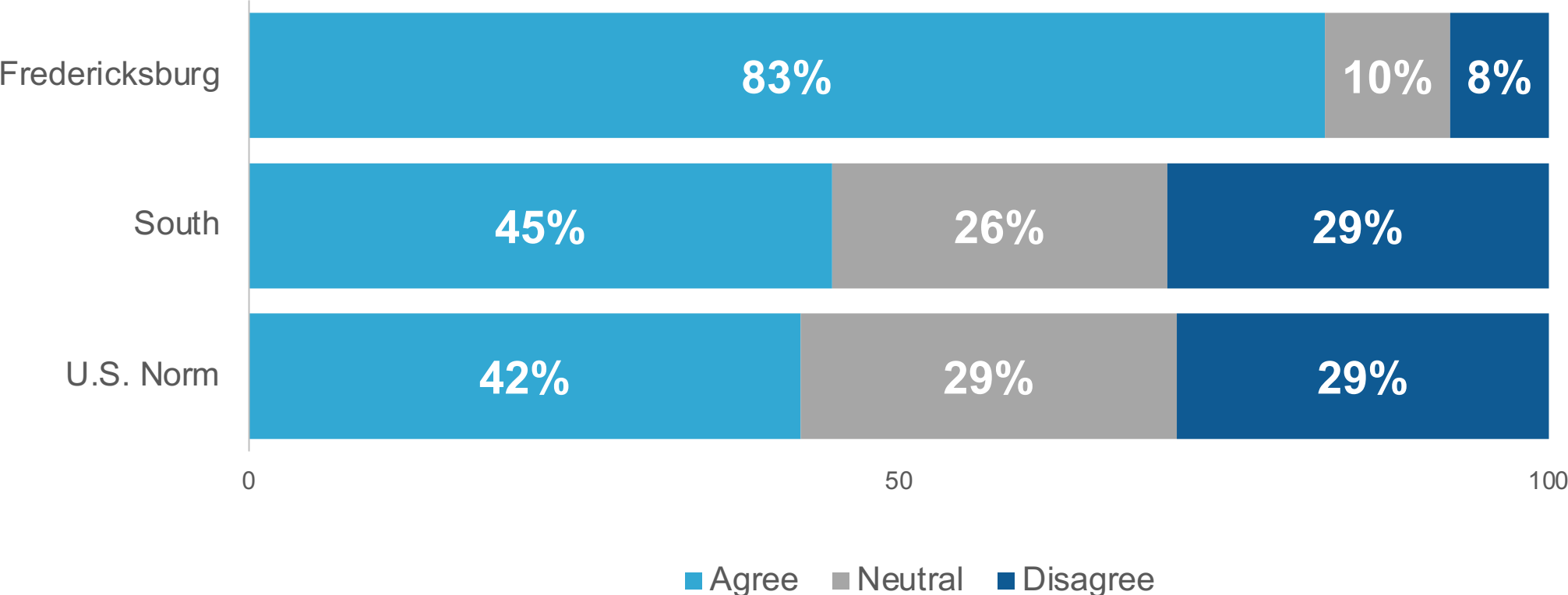
# Accommodation-Sharing Services

**Accommodation-sharing services like Airbnb, Vrbo, etc., can cause inflation in rents, raising the cost of living for locals**



# Accommodation-Sharing Services

People who use accommodation-sharing services like Airbnb, Vrbo, etc., can be disruptive to local neighborhoods





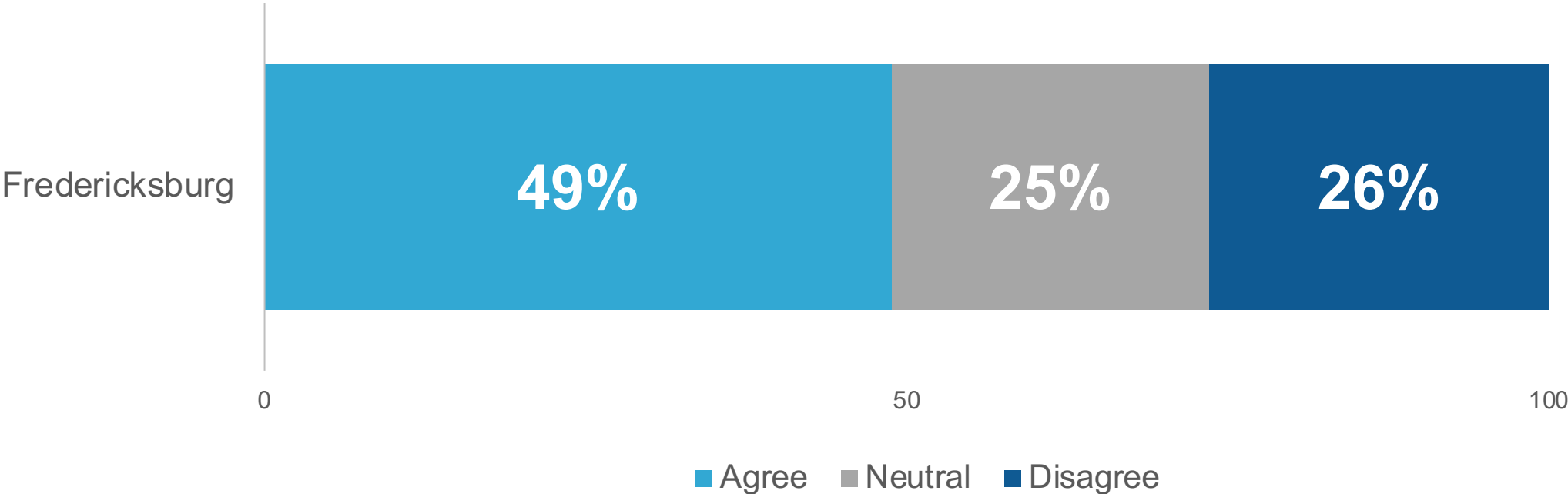
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**Tourism Ambassadors**

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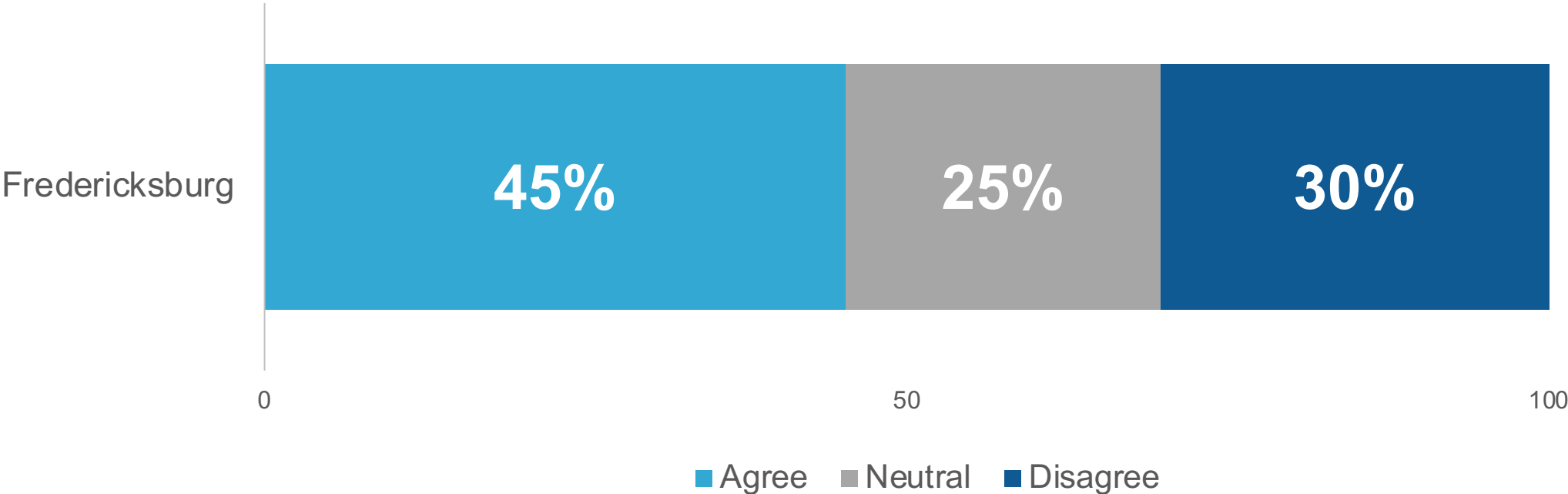
# Tourism Ambassadors

I'm proud of what Fredericksburg offers tourists



# Tourism Ambassadors

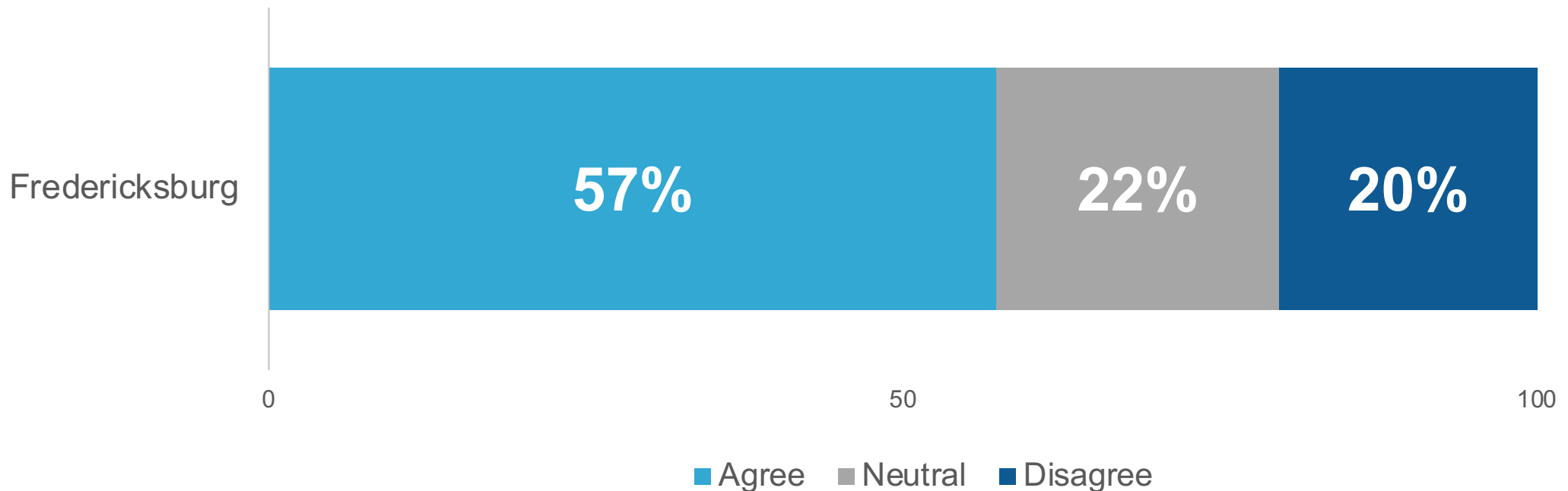
I welcome tourists to Fredericksburg





# Tourism Ambassadors

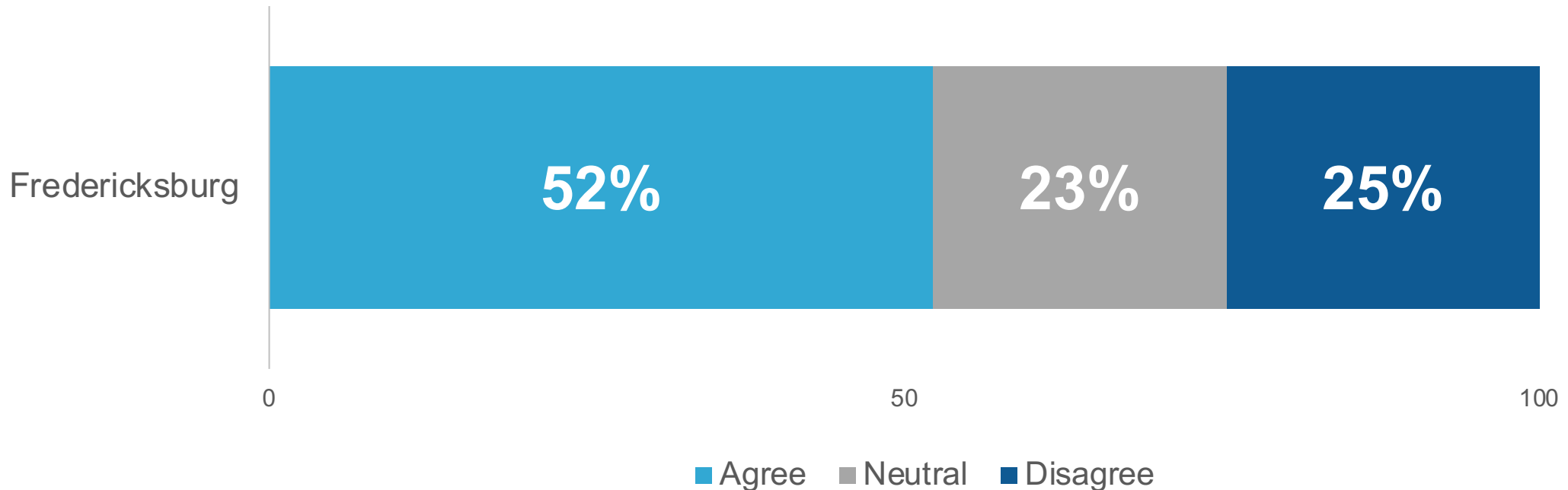
**I look forward to showing off Fredericksburg when friends and family visit**





# Tourism Ambassadors

**I feel I am an ambassador for Fredericksburg even among tourists I don't know**



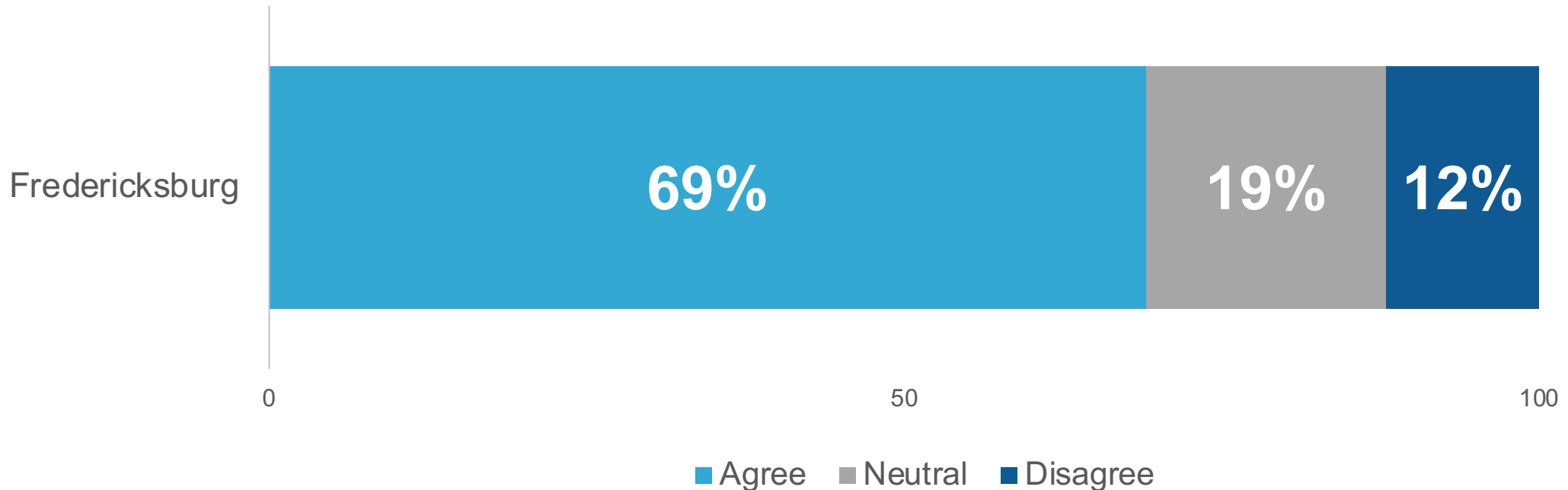


## Destination Stewardship and Love FBGTX

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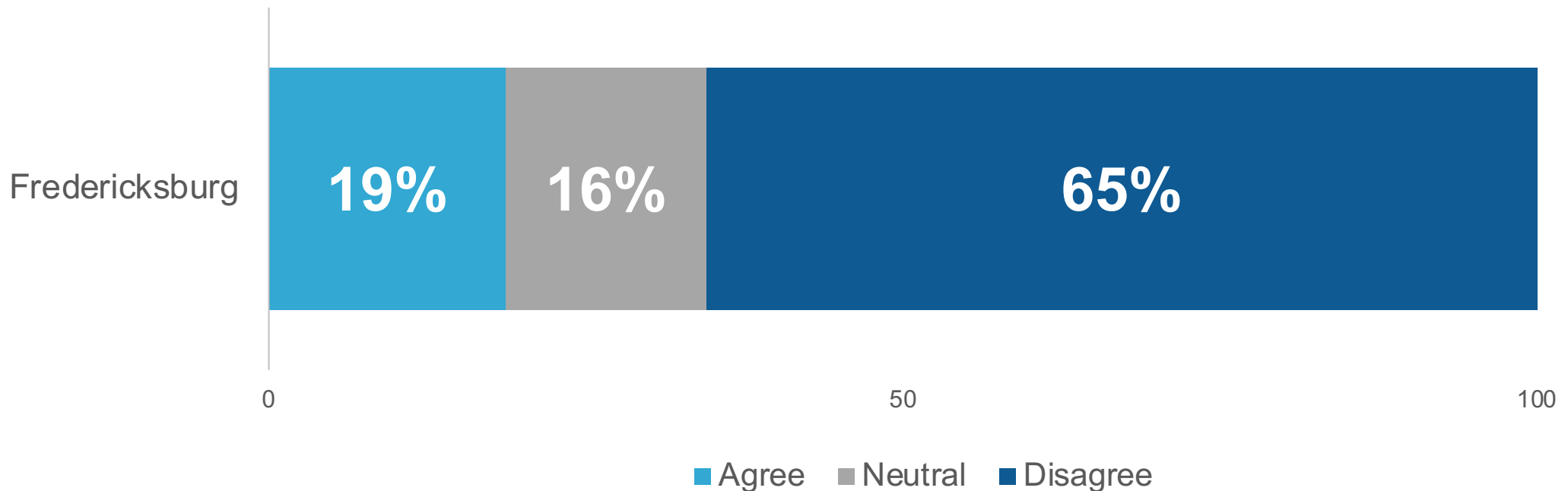
# Destination Stewardship

## Destination management/stewardship should be a priority for Fredericksburg



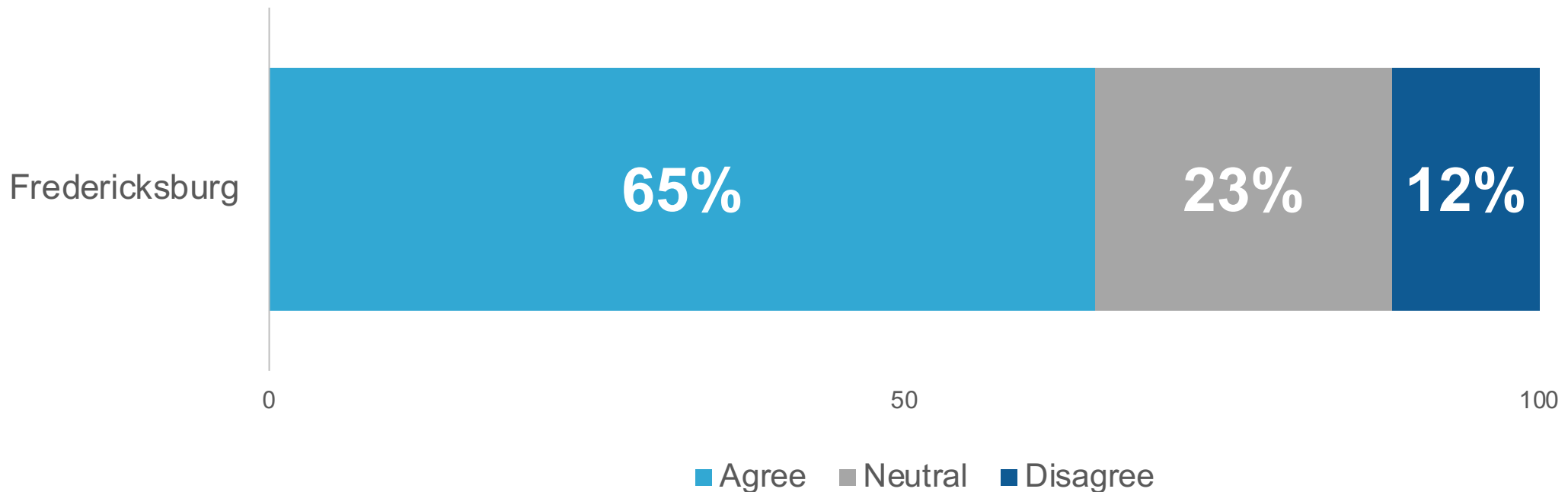
# Destination Stewardship

**Fredericksburg is doing a good job balancing resident quality of life and visitor satisfaction**

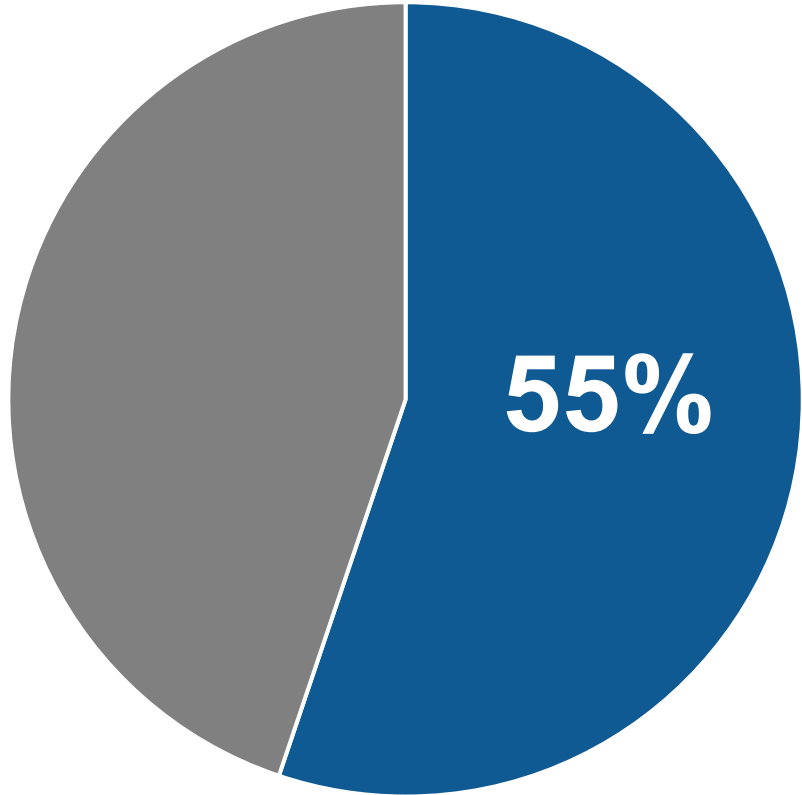


# Destination Stewardship

**The Fredericksburg Convention & Visitor Bureau should highlight stewardship in its promotional messaging**



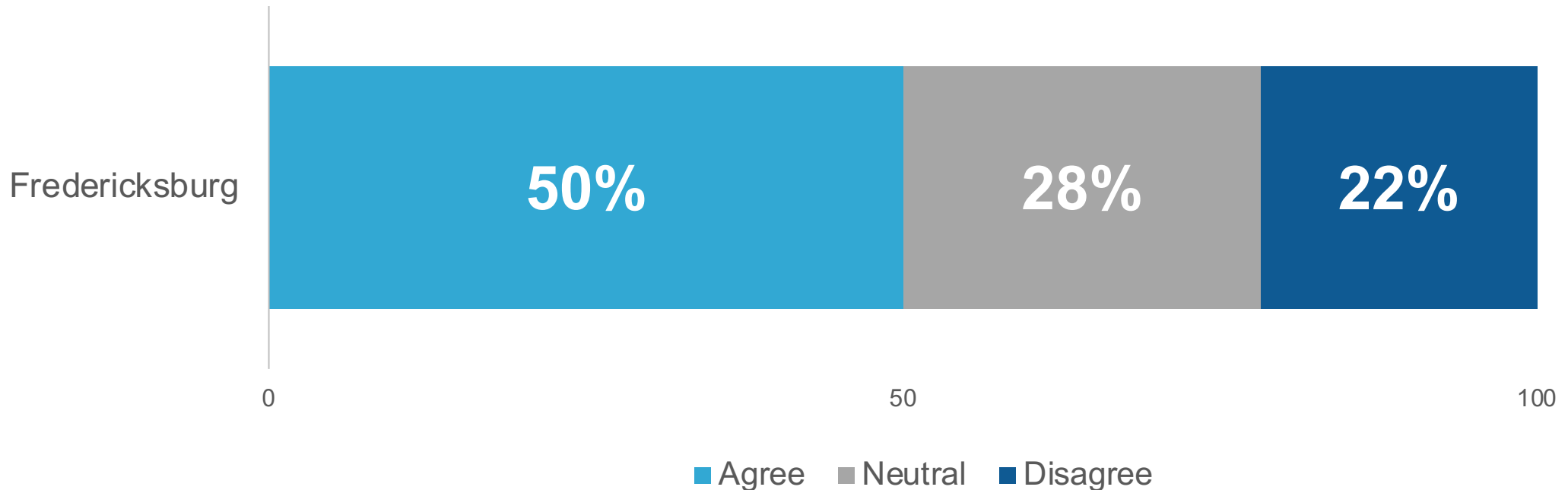
# Love FBGTX



**are aware of the Love FBGTX  
stewardship campaign**

Base: Residents aware of the Love FBGTX stewardship campaign

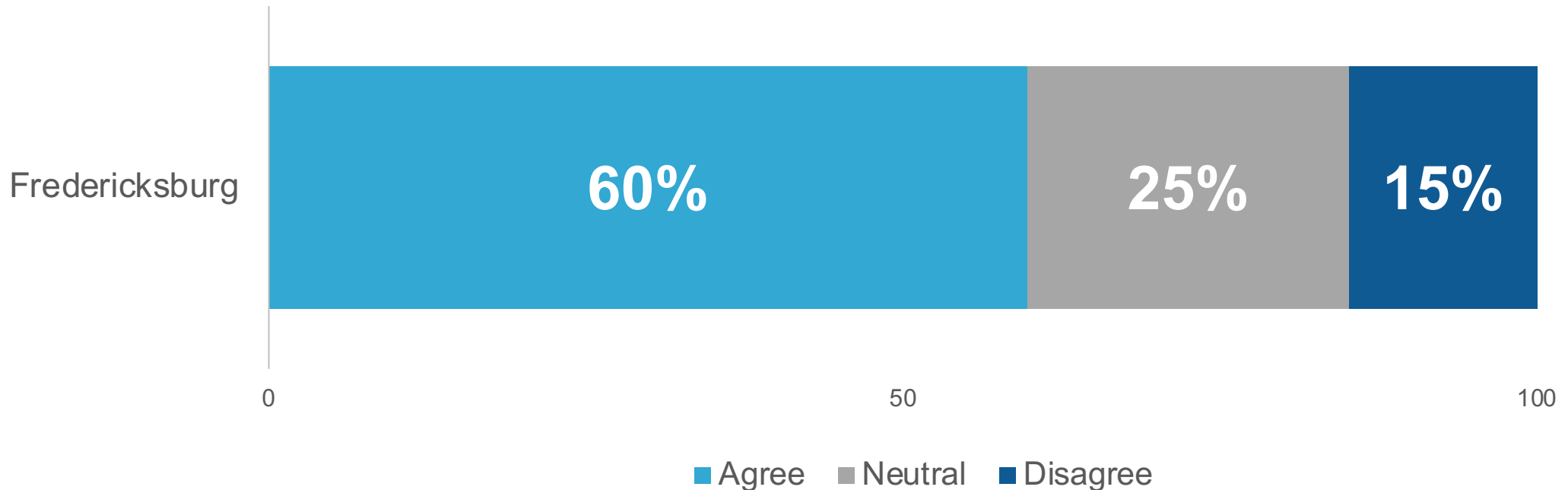
## I understand the goals of the Love FBGTX stewardship campaign





Base: Residents aware of the Love FBGTX stewardship campaign

## The Love FBGTX stewardship campaign is needed in our community





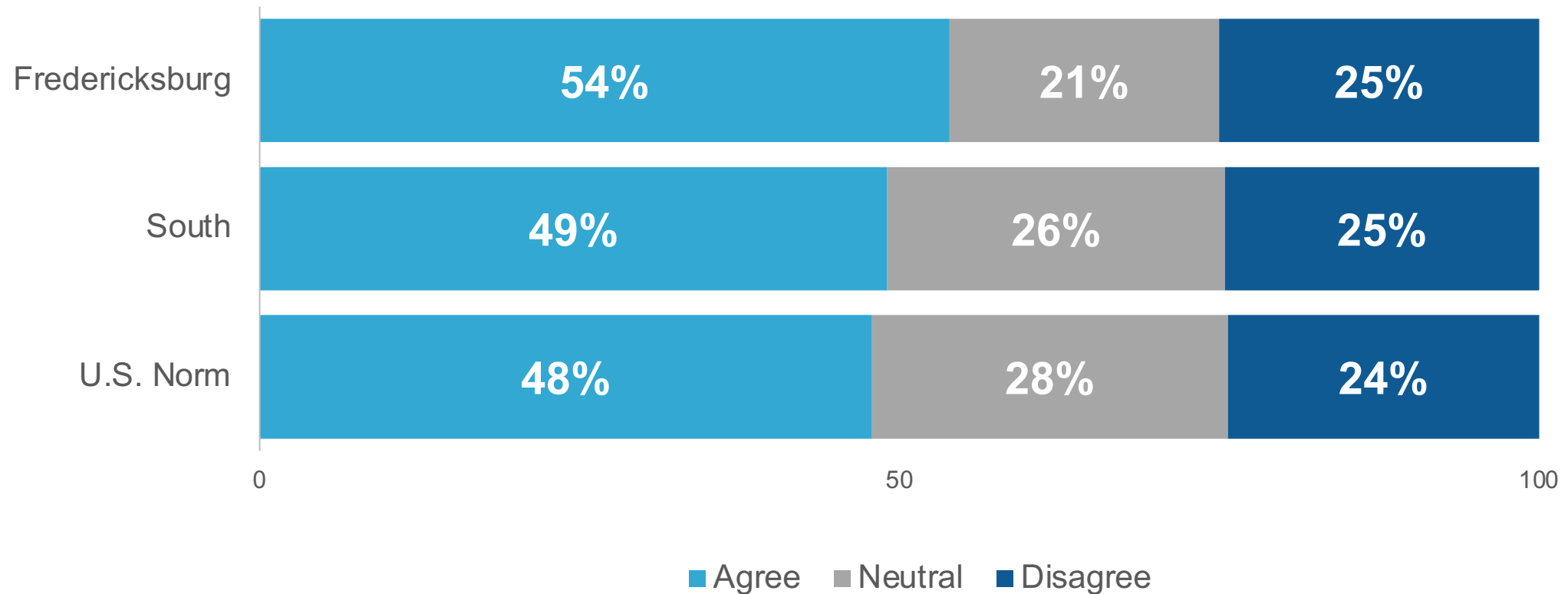
Longwoods  
INTERNATIONAL

## Involvement/Engagement with Tourism

**Fredericksburg®**  
THE TEXAS HILL COUNTRY

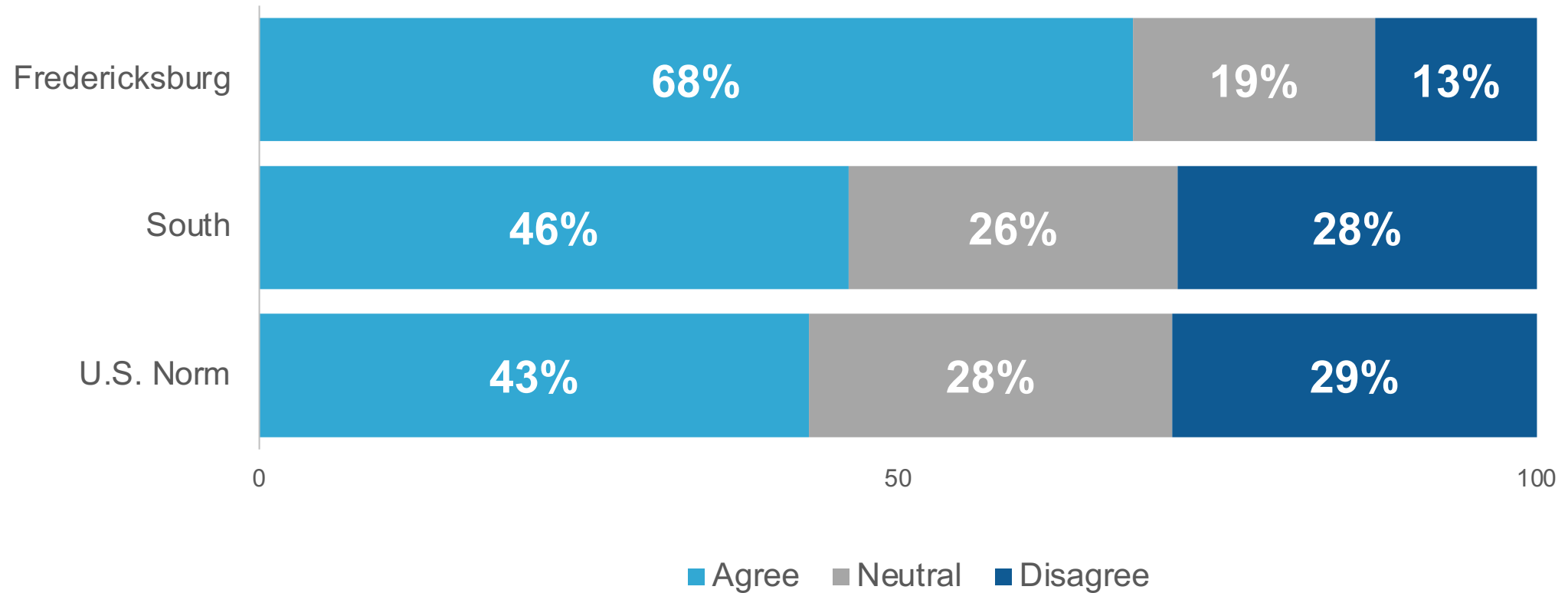
# Involvement/Engagement with Tourism

**When I come across local tourism news, I'm interested in finding out what's happening**



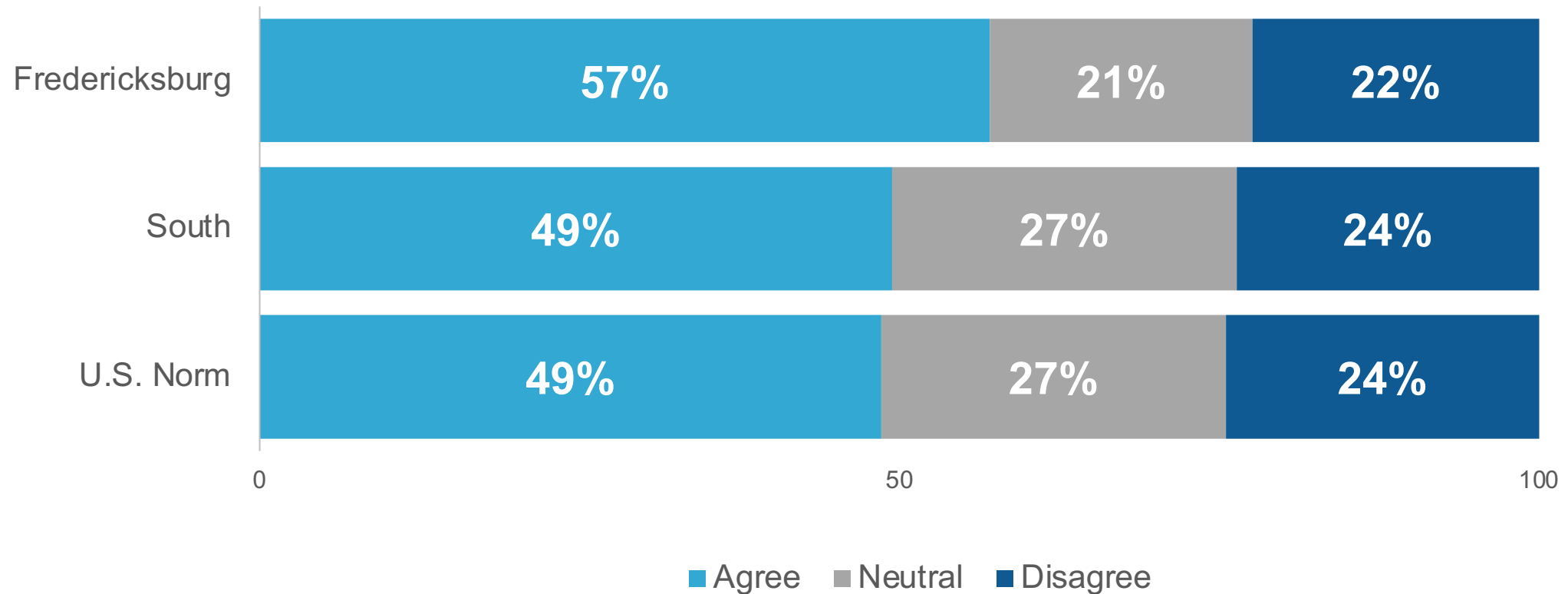
# Involvement/Engagement with Tourism

**I consider myself informed/up-to-date on news about tourism in this area**



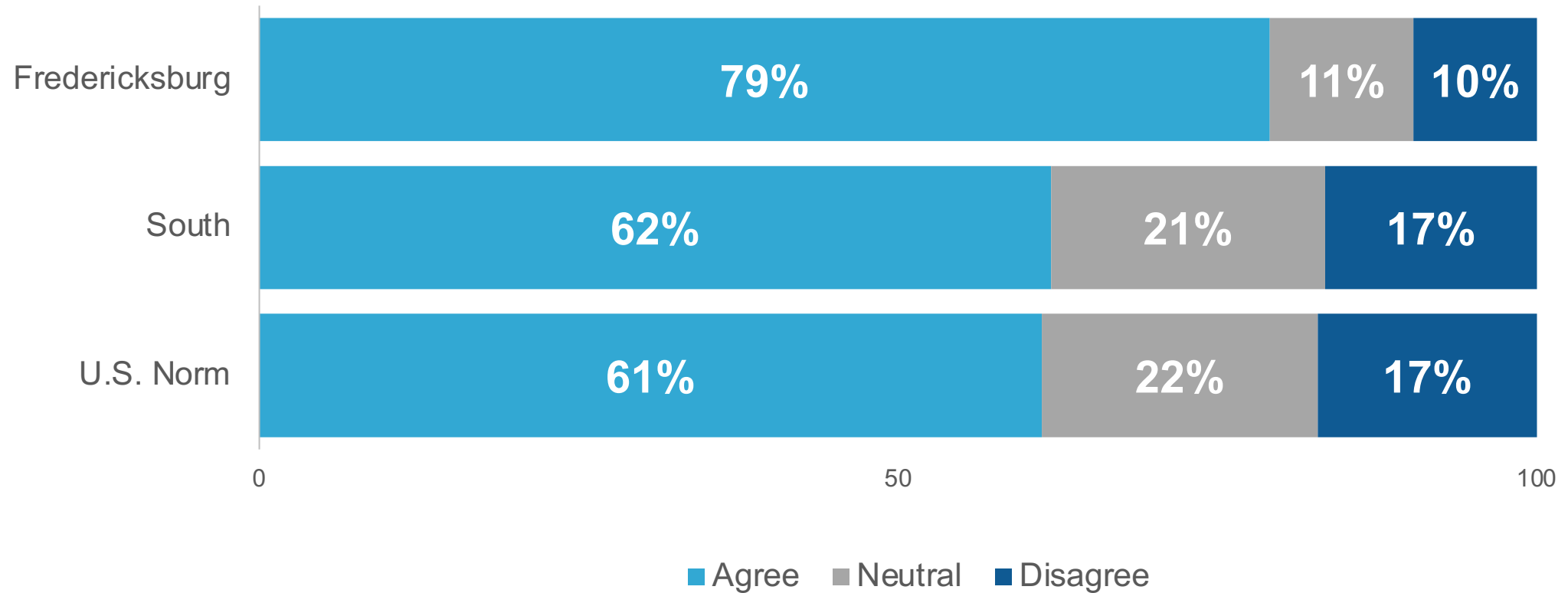
# Involvement/Engagement with Tourism

**I recommend local tourist sites to people who are visiting my area**



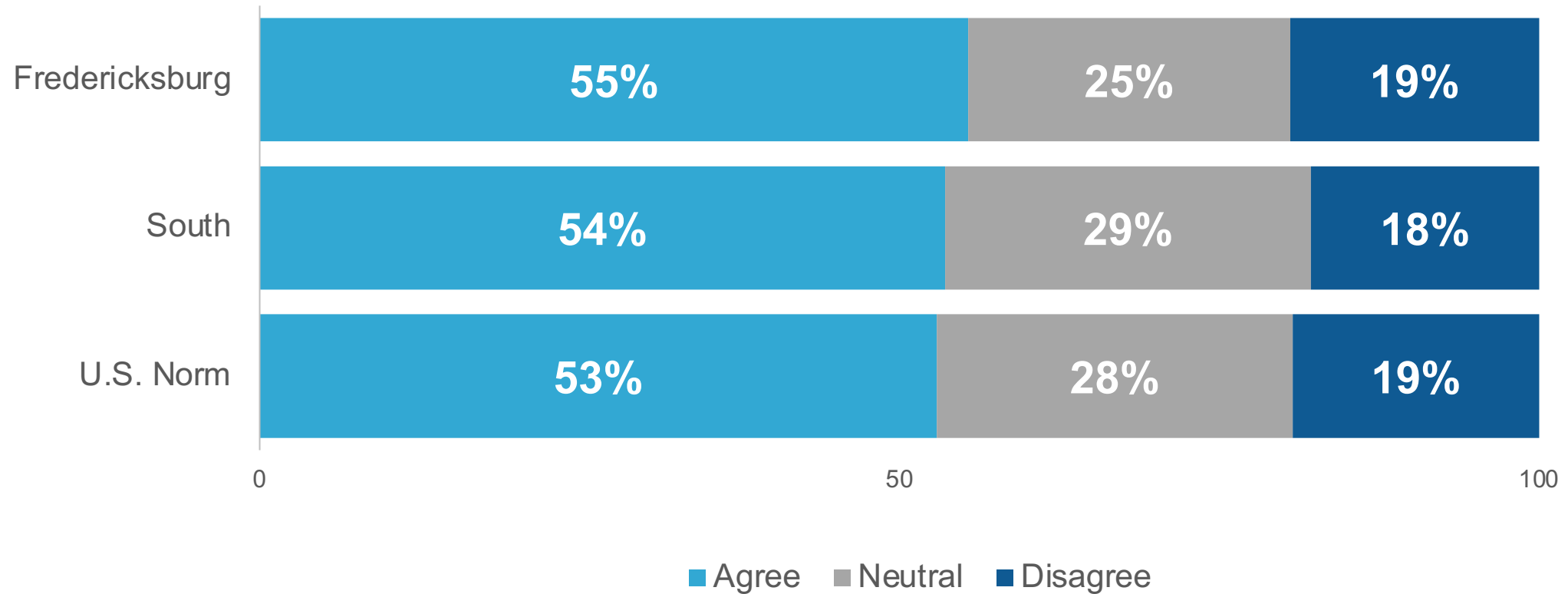
# Involvement/Engagement with Tourism

**I am proud to call this area my home**



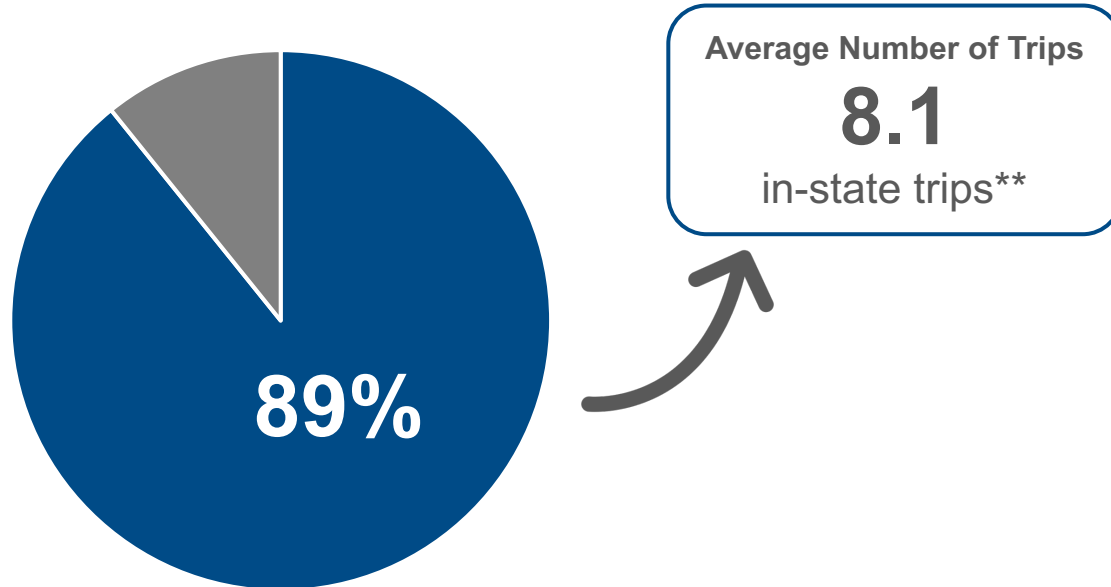
# Involvement/Engagement with Tourism

**Visiting other places gives me a greater appreciation for my local area**

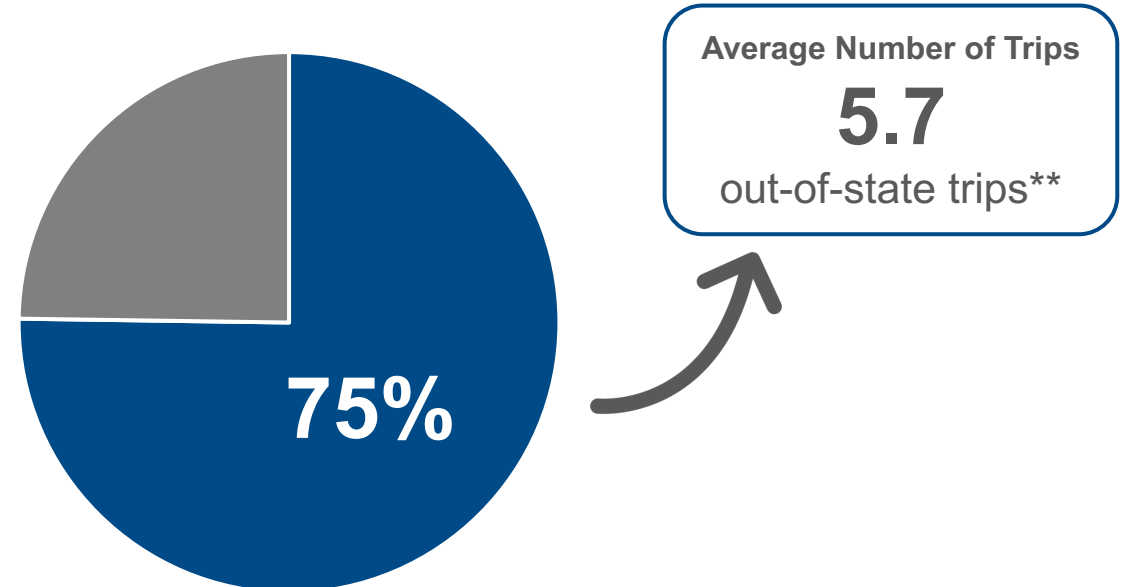


# Recent Travel Experience\*

Recently traveled to destinations  
within their own state



Recently traveled to destinations  
outside of their own state  
(national or international travel)

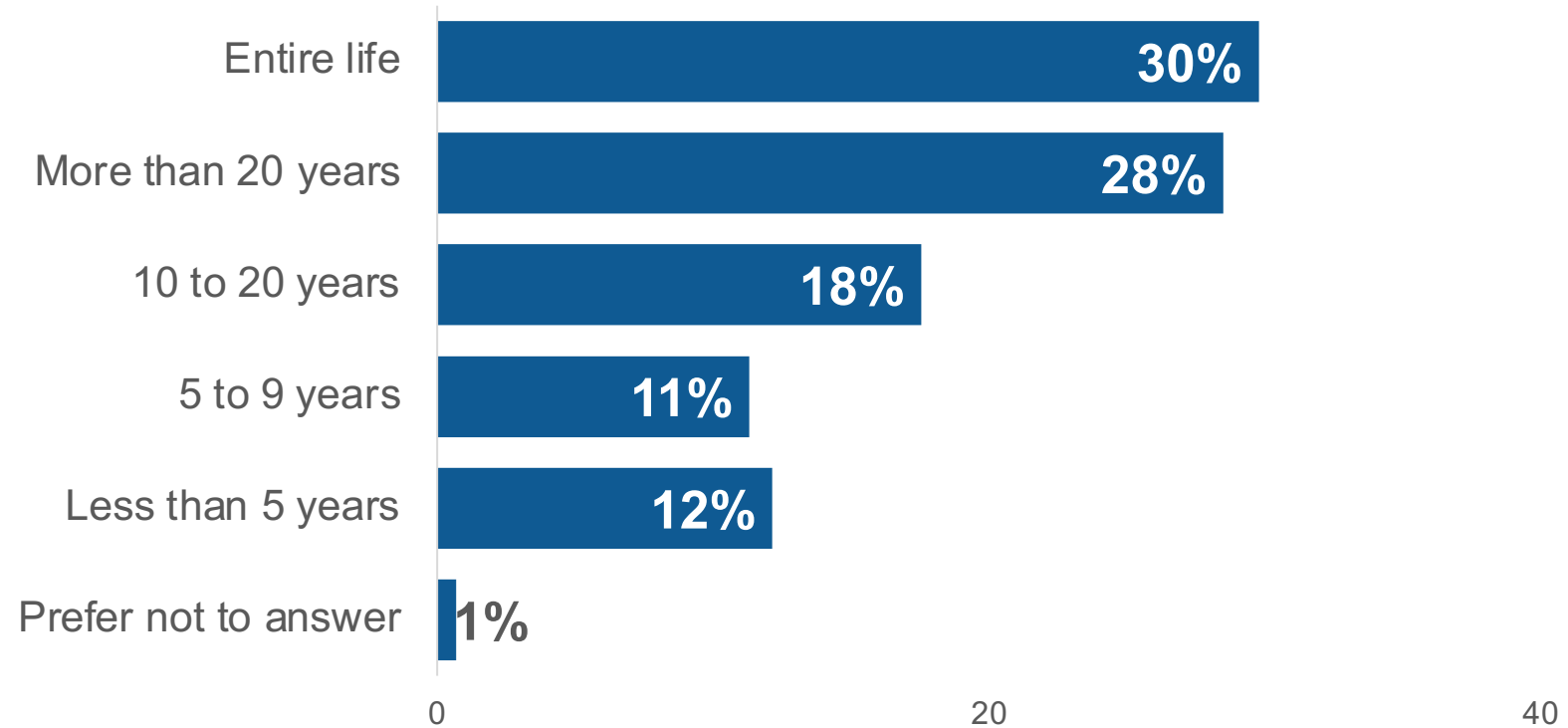


\*Overnight leisure or business trips within the past two years

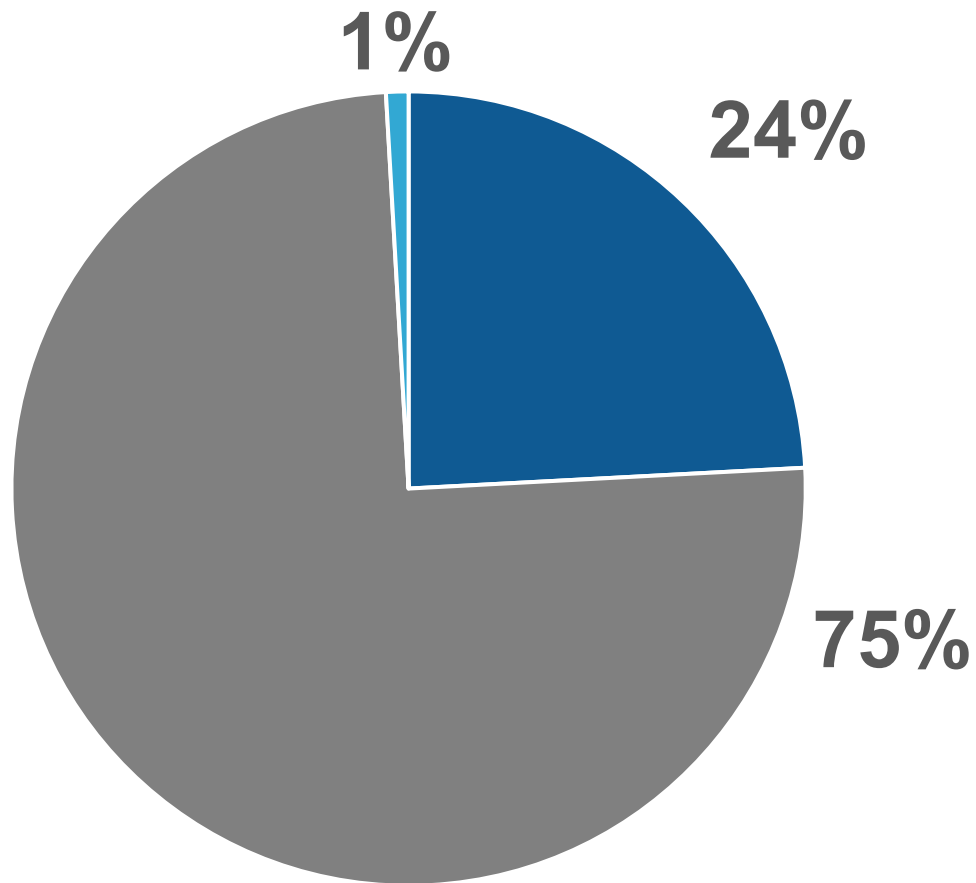
\*\*Average number of trips of those who have recently traveled



# Length of Residence in State



# Employment in Tourism



- At least one person in household is employed in tourism and hospitality industry
- No one in household is employed in tourism and hospitality industry
- Don't know

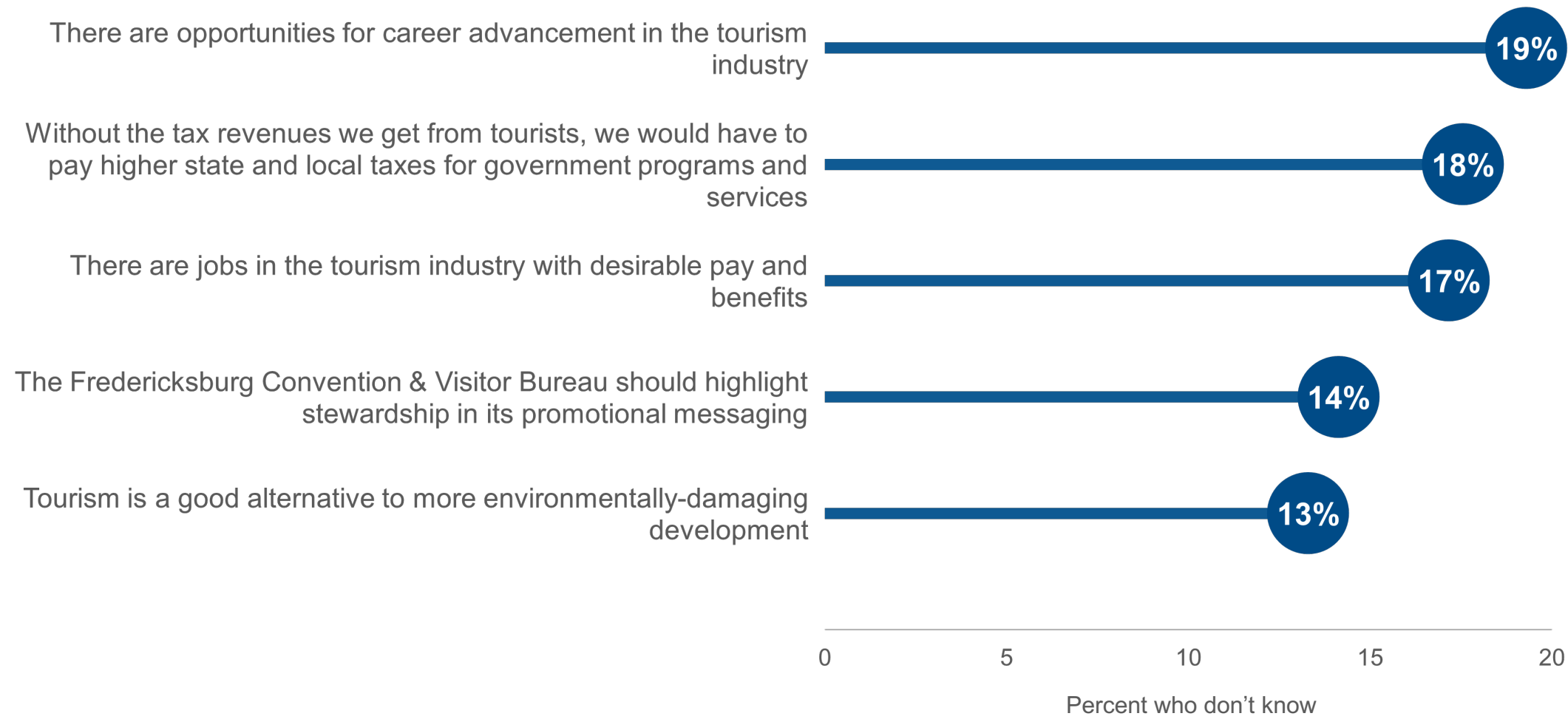


Longwoods  
INTERNATIONAL

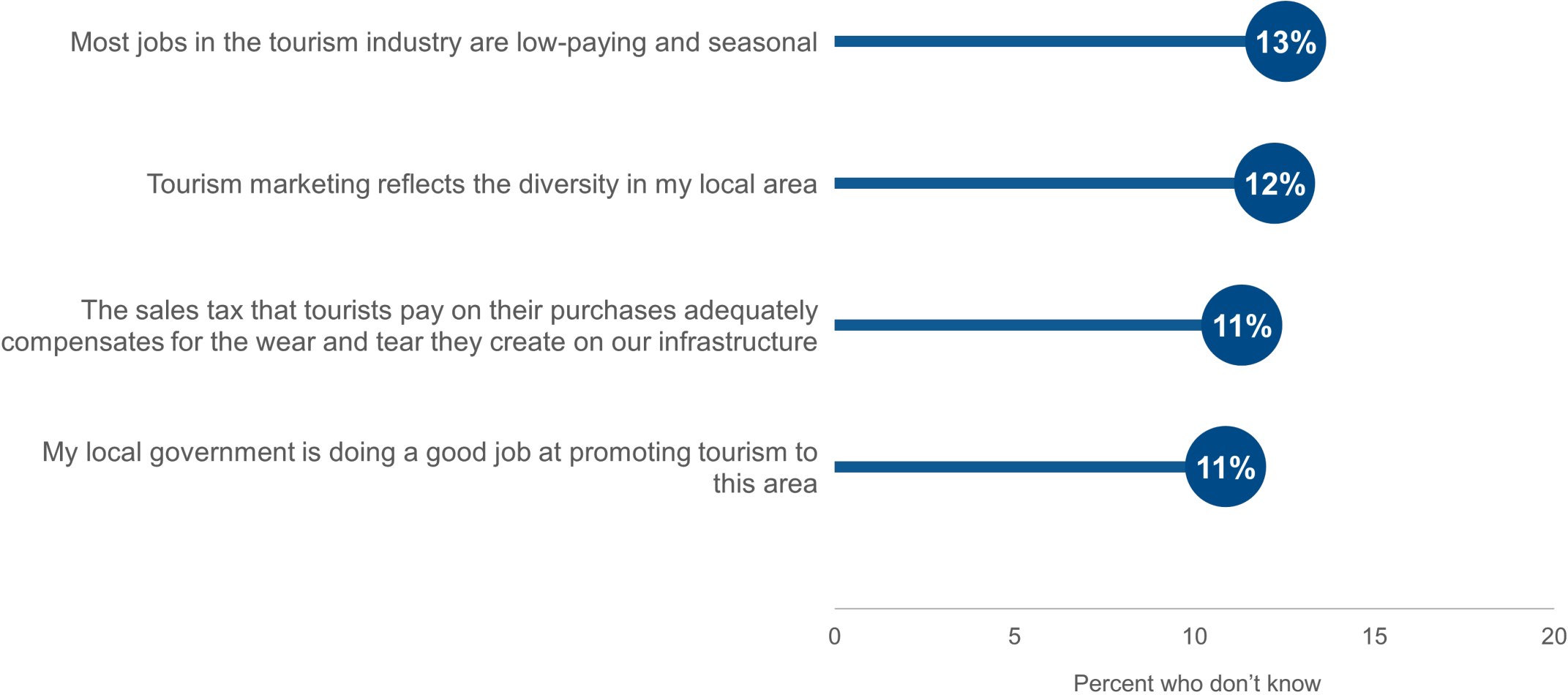
## What Residents Don't Know

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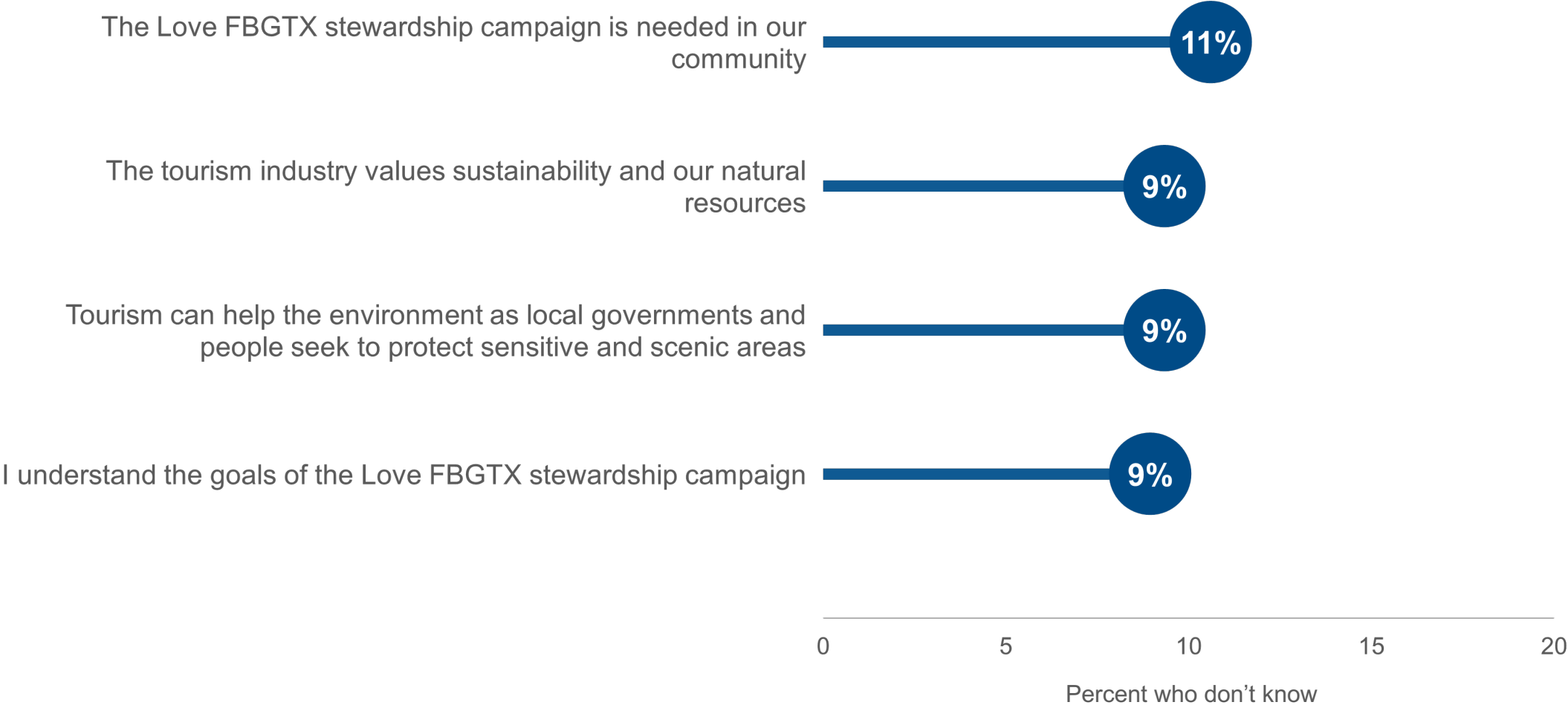
# What Residents Don't Know



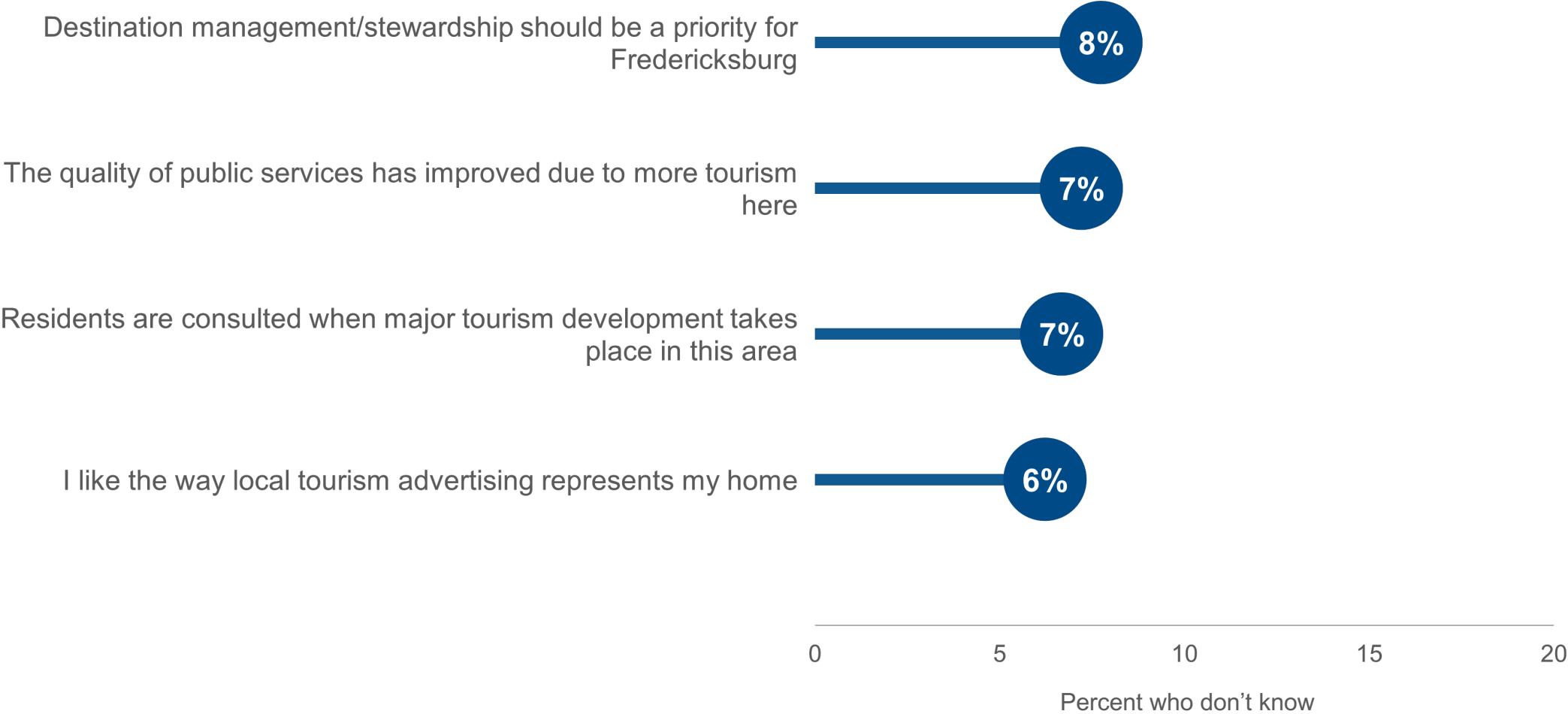
# What Residents Don't Know (Cont'd)



# What Residents Don't Know (Cont'd)

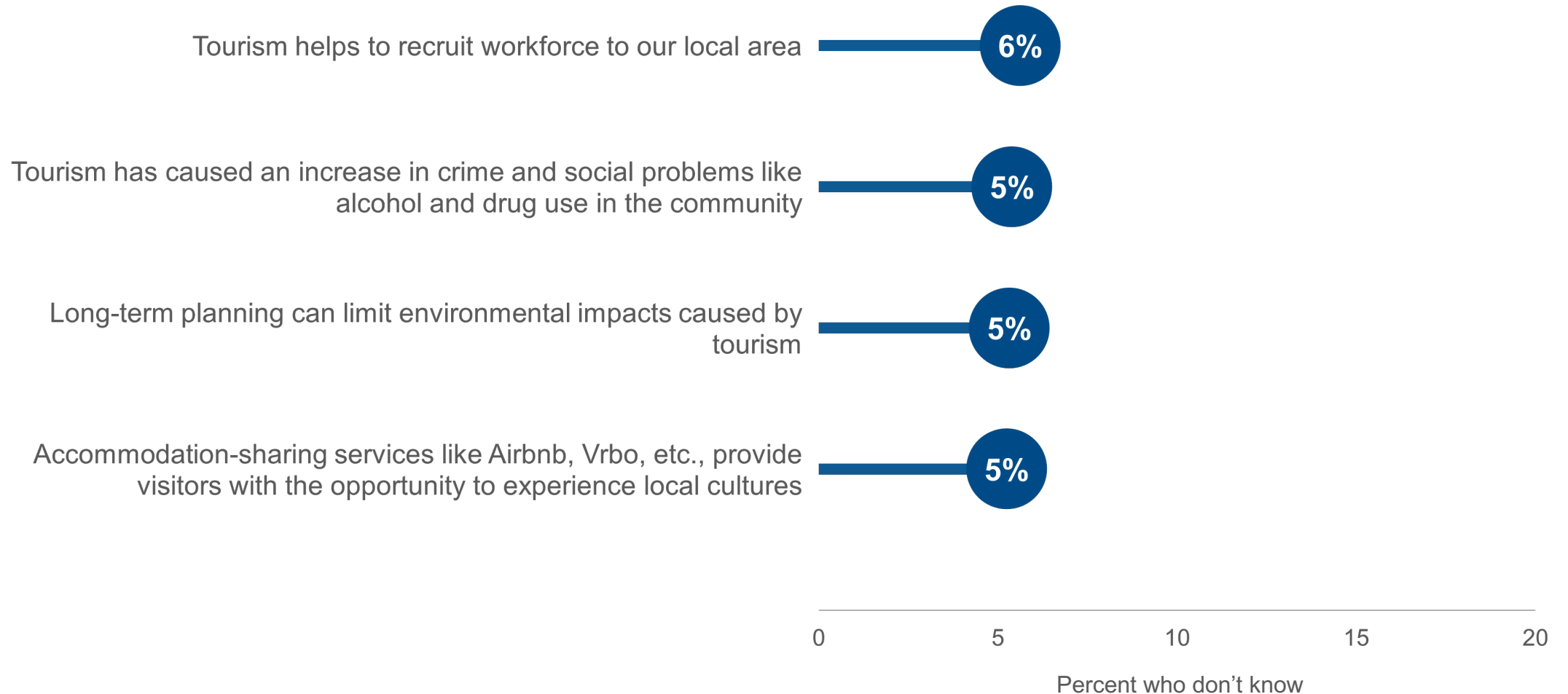


# What Residents Don't Know (Cont'd)





# What Residents Don't Know (Cont'd)





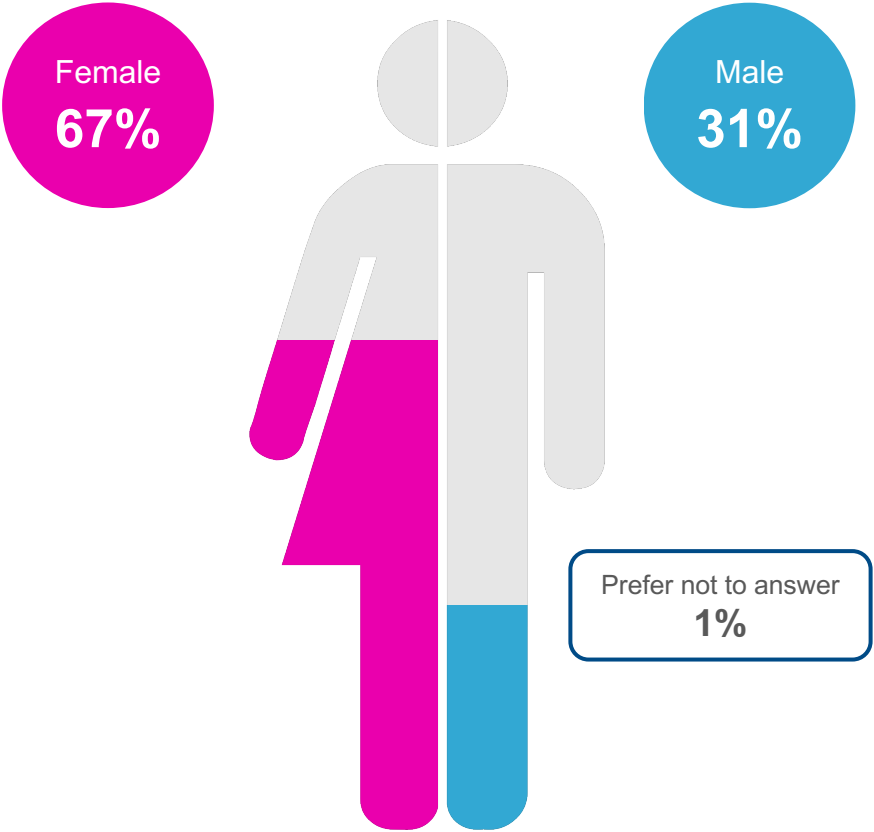
Longwoods  
INTERNATIONAL

## Demographic Profile

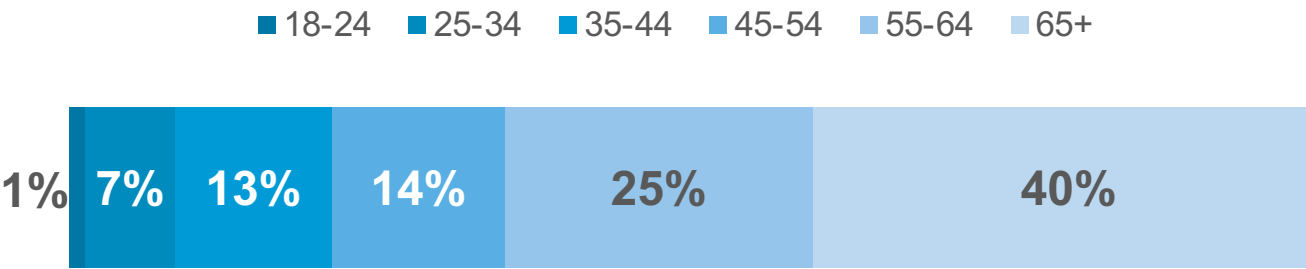
**Fredericksburg®**  
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# Demographic Profile

## Gender

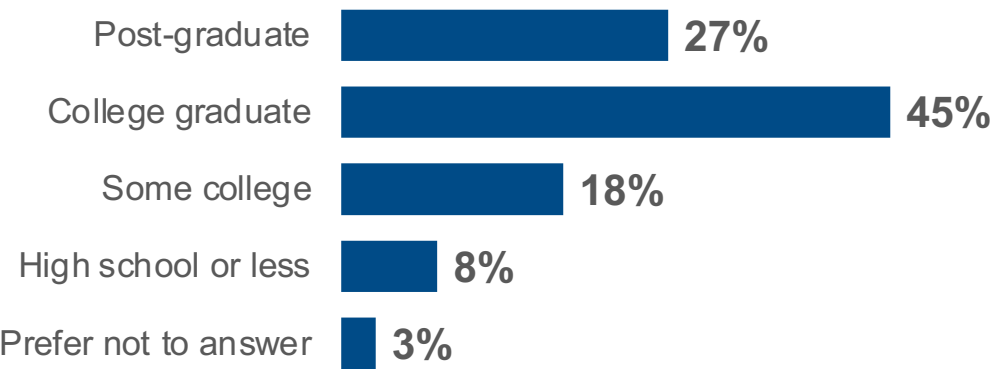


## Age

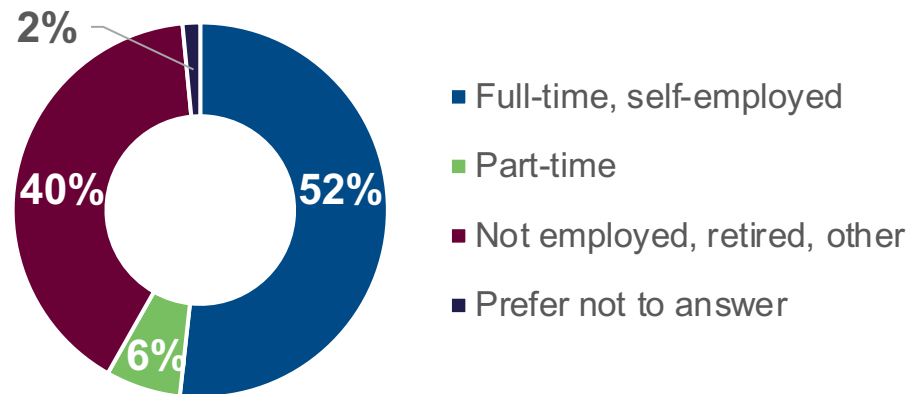


# Demographic Profile

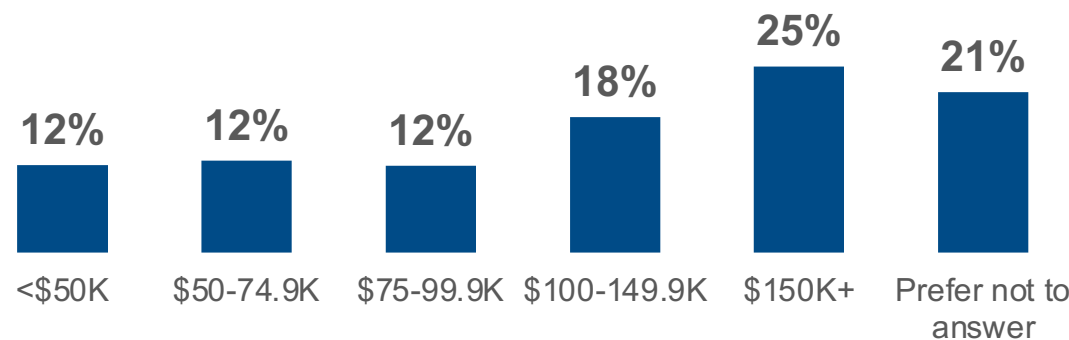
## Educational Attainment



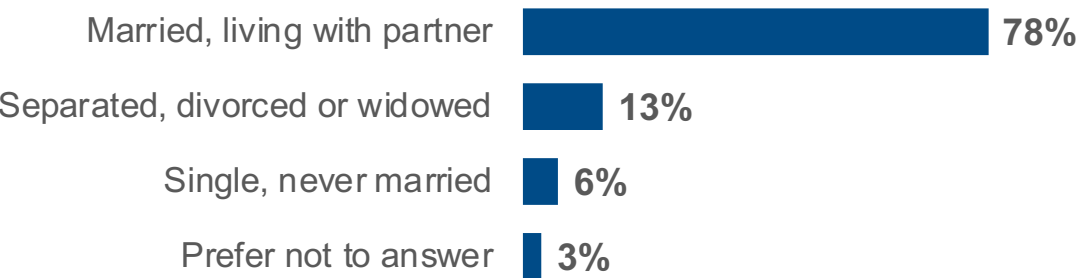
## Employment



## Household Income

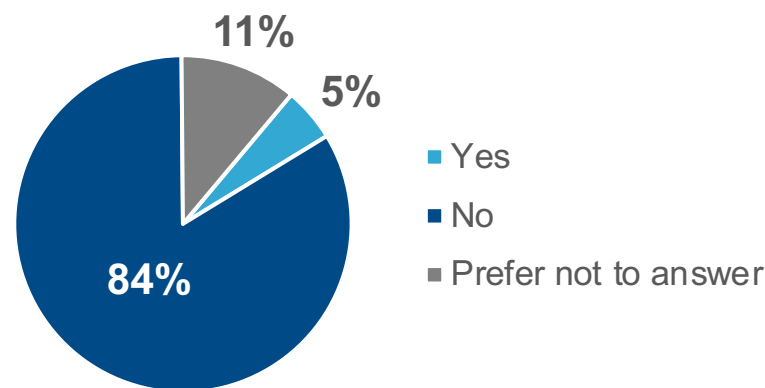


## Marital Status

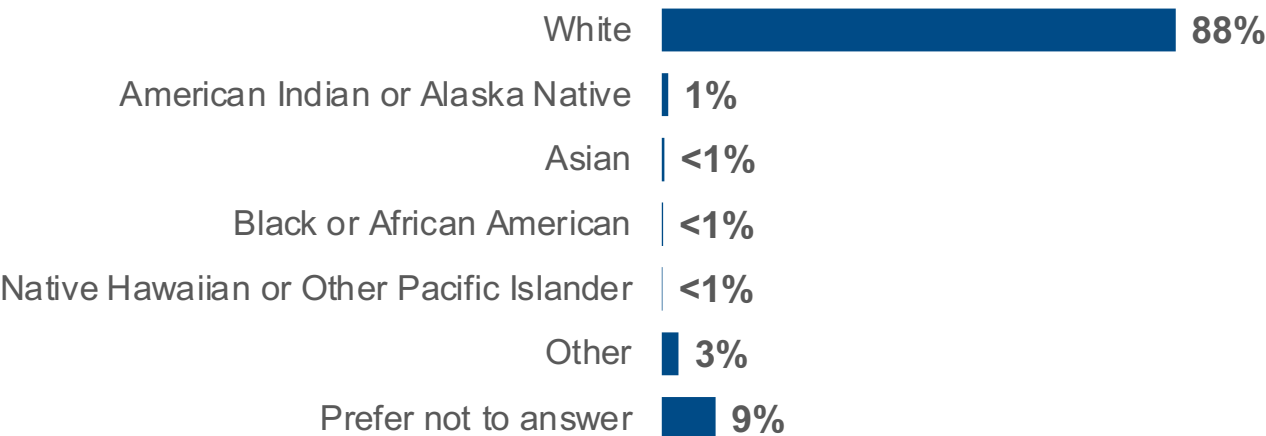


# Demographic Profile

## Hispanic Background



## Race



## Household Size





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