

MAY 8, 2019

RICHMOND REGION TOURISM

TOURISM
MASTER PLAN

COMMUNITY
SURVEY REPORT

OVERVIEW

The role of destination marketing and management organizations (DMMO) is undergoing profound changes. These organizations are increasingly becoming responsible for activities beyond attracting greater numbers of visitors. Today's DMMO leaders need to be thoughtful about how the quality of life for residents can be balanced with the quality of the visitor experience; about the kinds of visitors who would most appreciate the destination's character, its people and its offering; and how communities can responsibly grow a tourism industry for the benefit of all.

During this foundational step of the Tourism Master Planning process, the goal is to identify and define general attitudes towards living in the Richmond region and tourism's impact on resident quality of life. While desk research is valuable to paint a picture of a destination's broader market opportunities, primary research allows us to ask specific questions:

- What do residents think of the Richmond region as a place to live?
- What are the most important attributes to resident quality of life?
- How do residents view the tourism industry and its impact on the community?

The answers to these questions help address key issues with respect to livability, culture, economy and sense of place.

METHODOLOGY

In consultation with Richmond Region Tourism staff, Resonance developed an online survey to identify and gauge residents' perceptions on a variety of key characteristics with respect to livability, culture, economy and sense of place. The survey was extensively promoted via social media platforms and email to the databases of a variety of public and private organizations as introduced by Richmond Region Tourism staff. The survey questions were designed to:

- Assess resident understanding and perception of tourism as an industry and its impact on the Richmond region community
- Identify assets that may offer potential for increasing the resident quality of life and tourism growth
- Assess the quality and satisfaction with current services, accommodations and amenities throughout the Richmond region
- Engage residents in the development phase to accelerate the approval and design process for permanent changes in the future

More than 2,100 residents of the Richmond region community participated in the survey.

SUMMARY

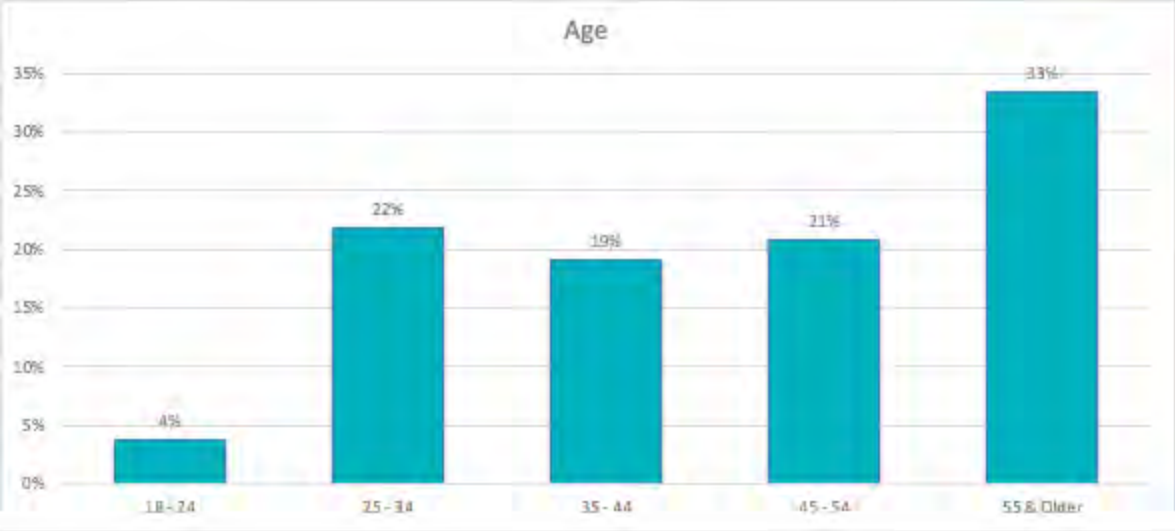
Richmond region residents recognise the importance and benefits of the tourism industry; however, they consistently underestimate the industry's size and value. The Community Survey Report identifies opportunities for the Richmond tourism industry to improve the telling of its story and educate the public regarding the overall value of tourism to the region's economy. The report also identifies key contributors to local quality of life and opportunities for the tourism industry to play a role in enhancing these elements of the destination.

KEY FINDINGS

- 95% of residents believe that tourism is good for the Richmond region
- 82% of residents believe the Richmond region is a destination visitors want to visit
- 34% of residents are concerned about tourism's impact on the community
- 26% of residents feel the current visitor intake is just right, while 48% feel it is not enough and less than one percent of residents feel the Richmond region is currently attracting too many visitors
- 50% of residents underestimate the number of annual visitors to the Richmond region (an additional 43% responded they don't know)
- 41% of residents underestimate the number of jobs created by tourism in the Richmond region (an additional 34% responded they don't know)
- Over 90% of residents believe tourism creates economic growth in the region and opportunities for business and employment
- 50% of residents believe tourism results in increased traffic congestion
- Culinary offerings and nature and parks were listed as the tourism attributes that are most important to resident quality of life in the region
- The number and quality of restaurants, parks and outdoor spaces and location were listed as the best things about living in the Richmond region
- Road quality and homelessness were listed at least-liked attributes of the Richmond region

AGE

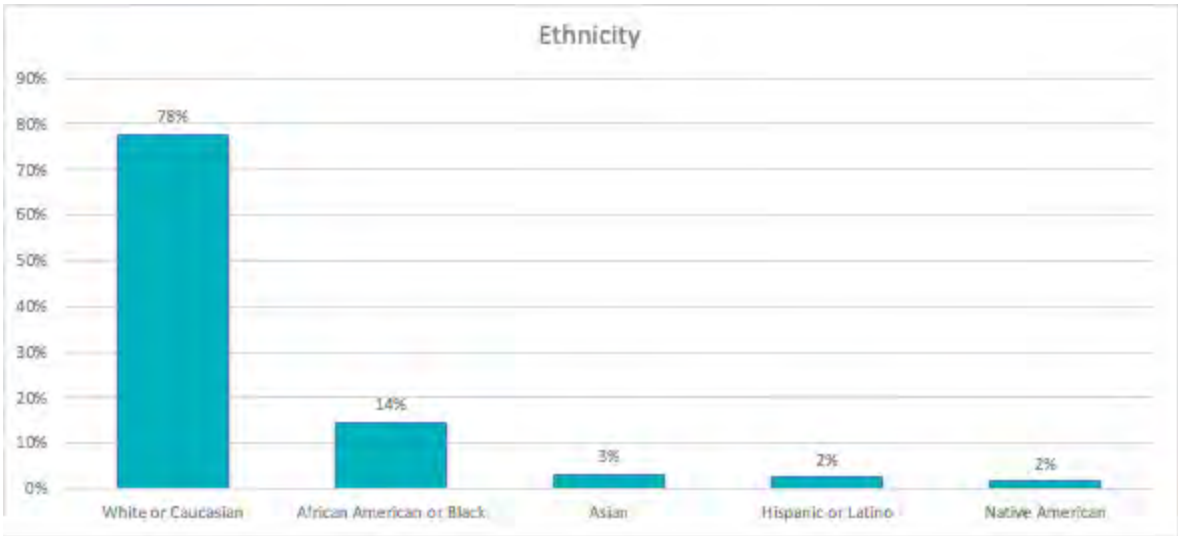
One-third of respondents were 55 years of age or older, while roughly two in ten fell into the categories of 25-34, 35-44 and 45-54. Generation Z residents, aged 18-24, were underrepresented at only 4% of the survey respondents.



Q. What is your age?

ETHNICITY

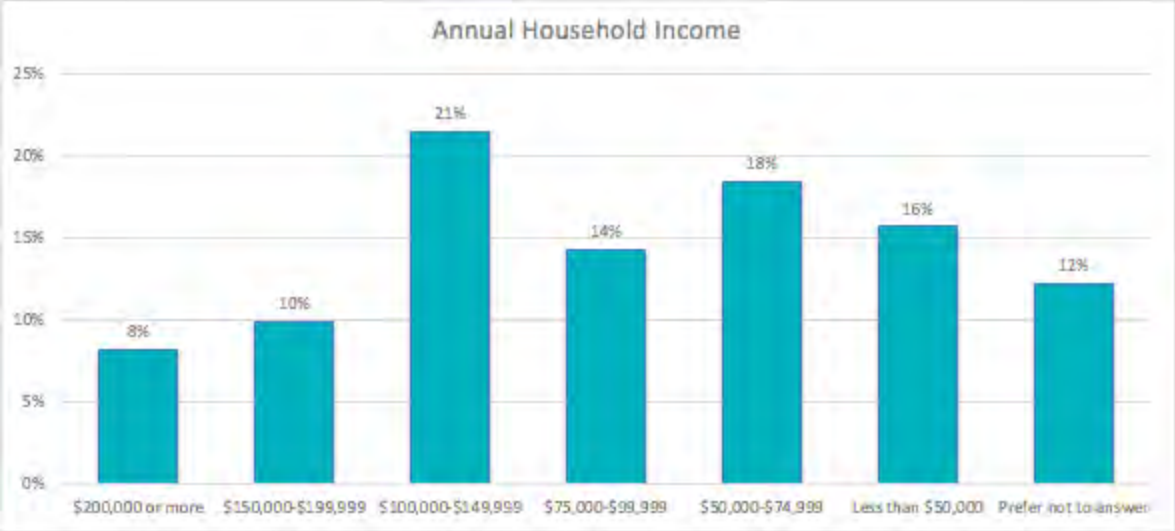
Nearly eight in ten survey respondents were white or caucasian. African American residents accounted for 14% of the respondents, while Asian and Hispanic residents accounted for 3% and 2% of the population, respectively. It should be noted that while efforts were made to obtain a sample representative of the Richmond region, minority groups, in particular African American residents, were underrepresented in the survey population.



Q. To make sure we are representing the views of a broad mix of people, please indicate the ethnic group to which you belong. (Check all that apply)

HOUSEHOLD INCOME

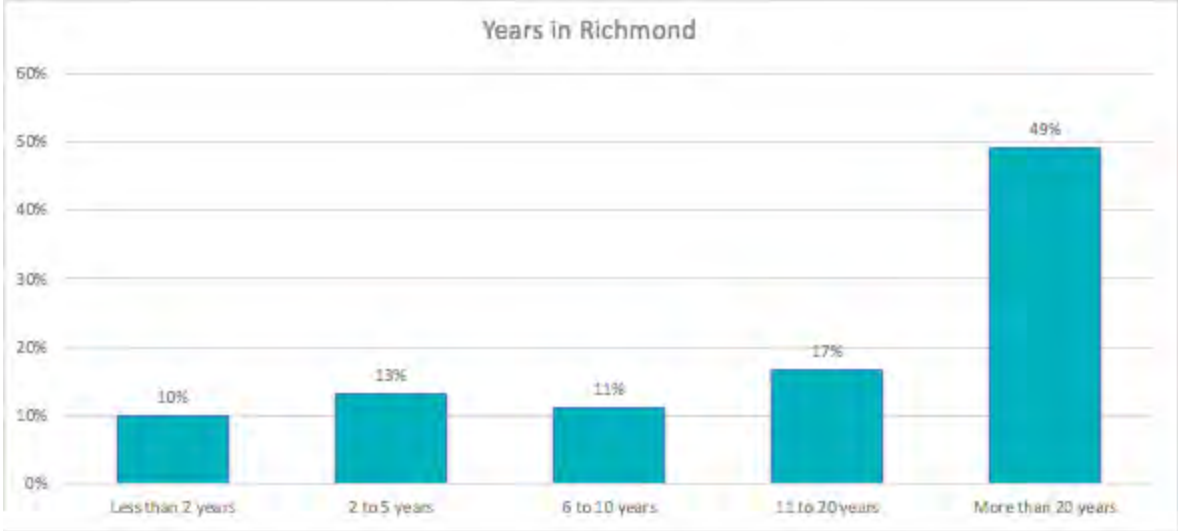
Respondents from various income groups were well represented. It should be noted that with a median household income for the Richmond Virginia metro area of \$67,633 in 2017, survey respondents tended to have a slightly higher annual income than average Richmond region residents.



Q. Which of these ranges includes your total annual household income, before taxes for 2018?

NUMBER OF YEARS IN RICHMOND

Nearly half of the respondents have lived in the Richmond region for more than 20 years, while one in ten is a new resident, relocating to the Richmond region within the last two years.



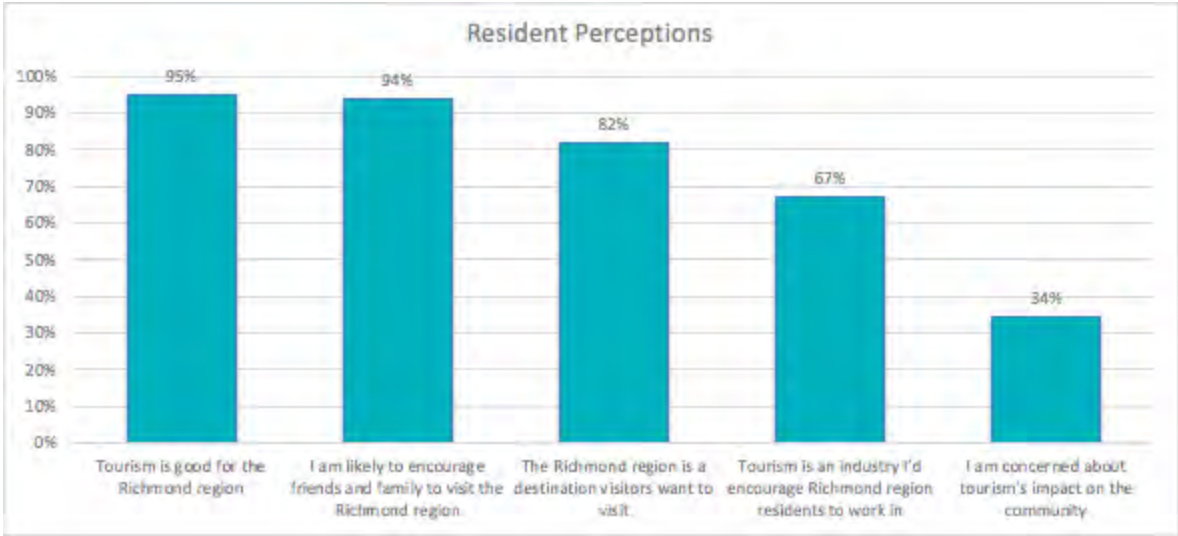
Q. How many years have you lived, worked or studied in the Richmond region?

RESIDENT PERCEPTIONS

PERCEPTIONS OF TOURISM

More than 90% of residents believe that tourism is good for the Richmond region and a similar percentage indicate they are likely to encourage friends and family to visit the Richmond region. Eight in ten residents believe the Richmond region is a destination visitors want to visit, while two-thirds agree that tourism is an industry they would encourage Richmond region residents to work in. One-third of Richmond region residents expressed concern about tourism’s impact on the community.

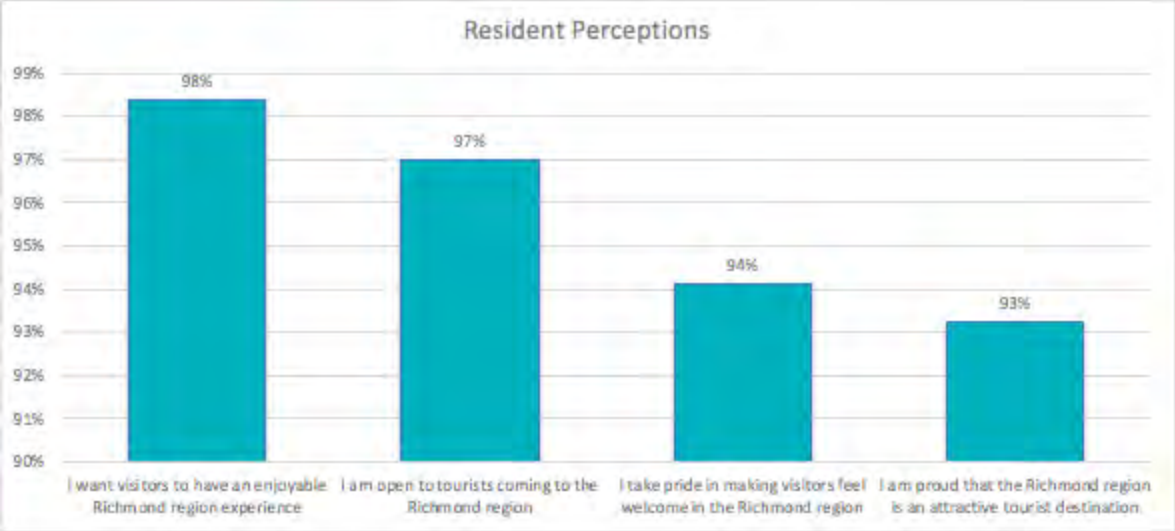
Richmond region residents who indicated they work in the hospitality and tourism industry were much more likely to agree tourism is an industry they would encourage residents to work in (85% vs 67%). African American residents were more likely to indicate they are concerned about tourism’s impact on the community (48% vs 34%). Residents who lived in downtown Richmond were the most likely to indicate they are concerned with tourism’s impact on the community.



Q. Do you agree with the following statements?

HOSTING VISITORS

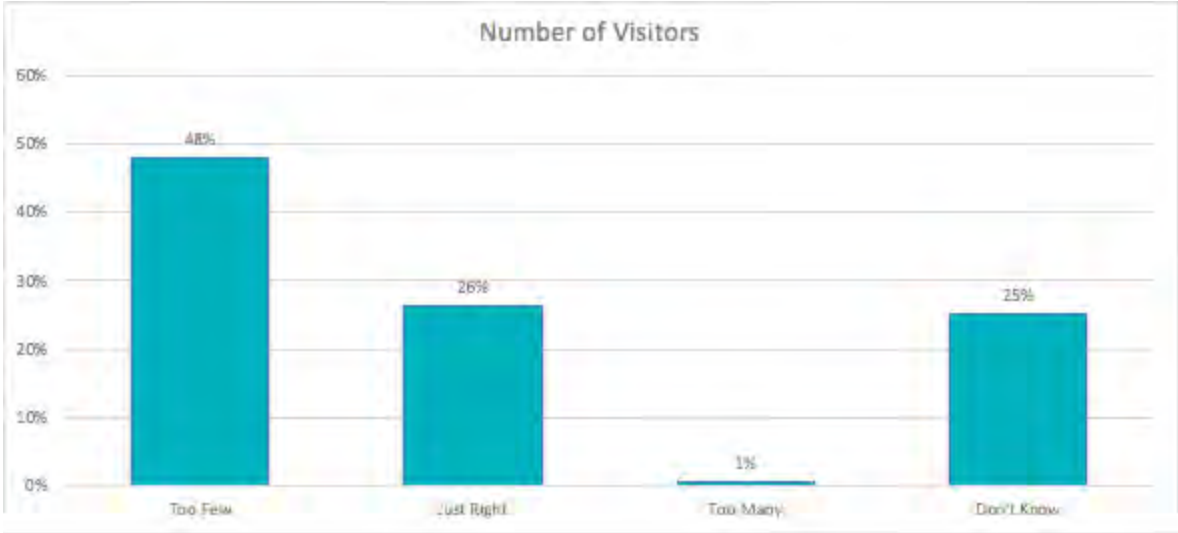
Almost all residents surveyed agreed they are open to tourists coming to the Richmond region and that they want visitors to have an enjoyable Richmond region experience. More than 90% of residents feel proud that the Richmond region is an attractive tourist destination and take pride in making visitors feel welcome in the Richmond region.



Q. Do you agree with the following statements?

NUMBER OF VISITORS

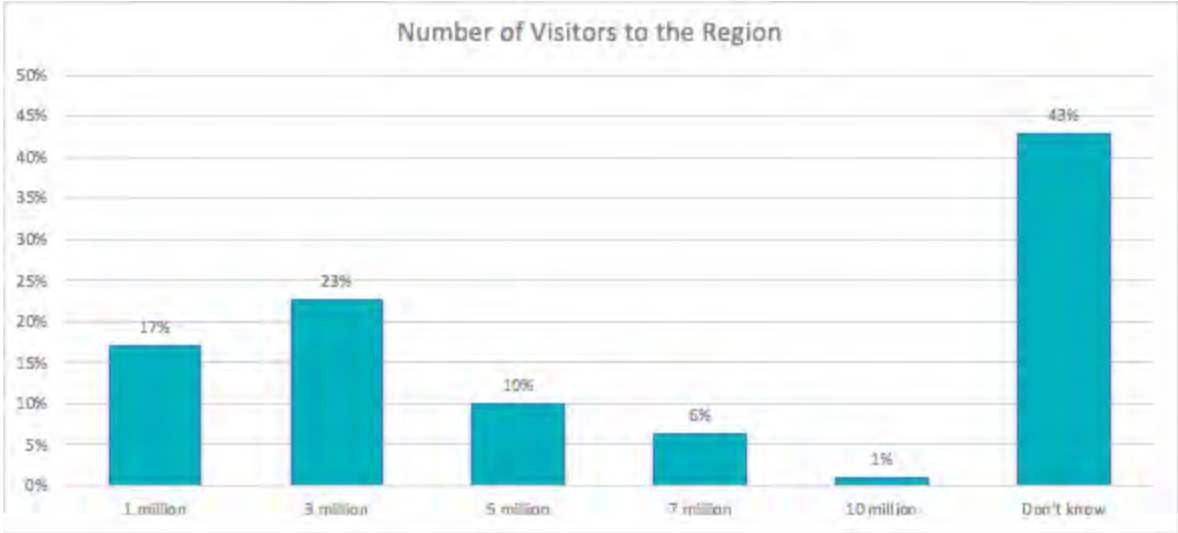
One-quarter of residents feel the current visitor intake is just right, while roughly half feel that the Richmond region should be attracting more visitors. Less than one percent of residents surveyed indicated that the Richmond region is currently attracting too many visitors to the destination.



Q. Overall, from your perspective, do you think that the Richmond region attracts too many, too few, or just the right amount of visitors?

CURRENT VISITATION LEVELS

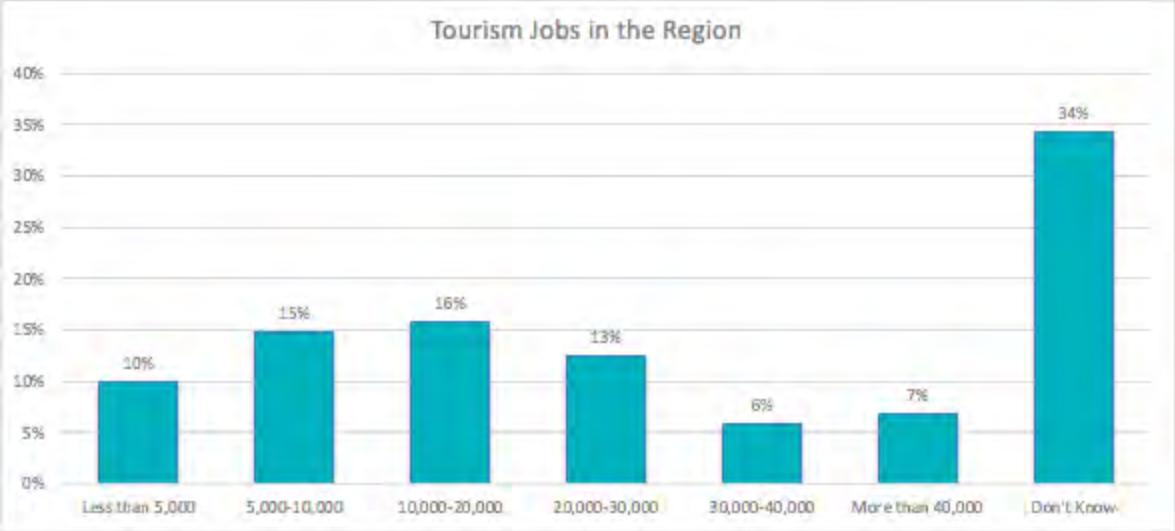
Half of the residents surveyed underestimate the number of annual visitors to the Richmond region (more than 7 million), while an additional 43% of residents indicate that they don't know the number of annual visitors to the region.



Q. How many visitors do you think come to Richmond each year?

TOURISM EMPLOYMENT

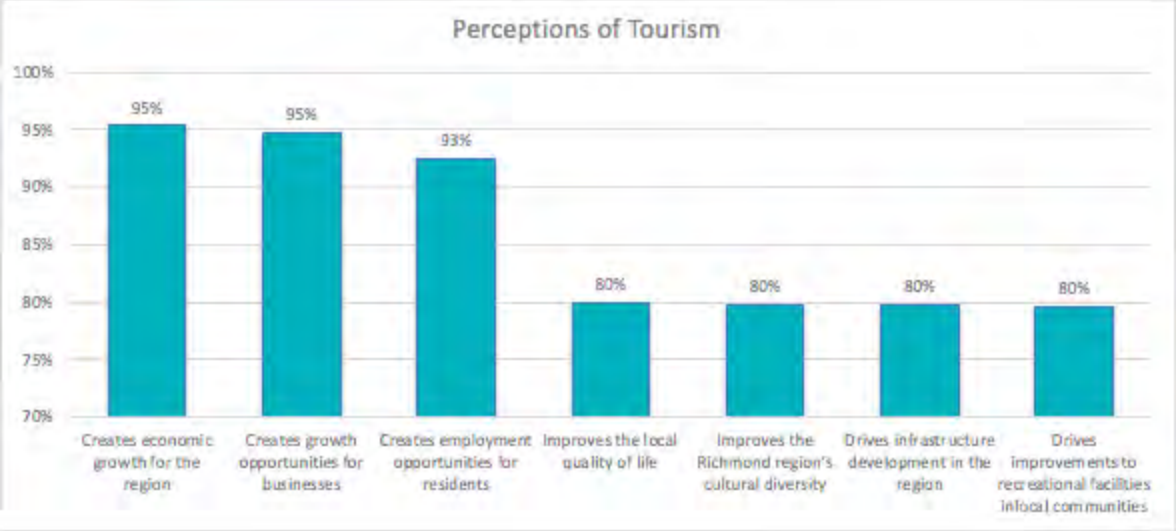
41% of residents underestimate the number of jobs created by tourism in the Richmond region (23,715) and an additional 34% indicate they don't know how many Richmond region residents are employed in the tourism industry.



Q. How many Richmond region workers do you think are either directly or indirectly employed in the tourism industry?

TOURISM'S POSITIVE IMPACT

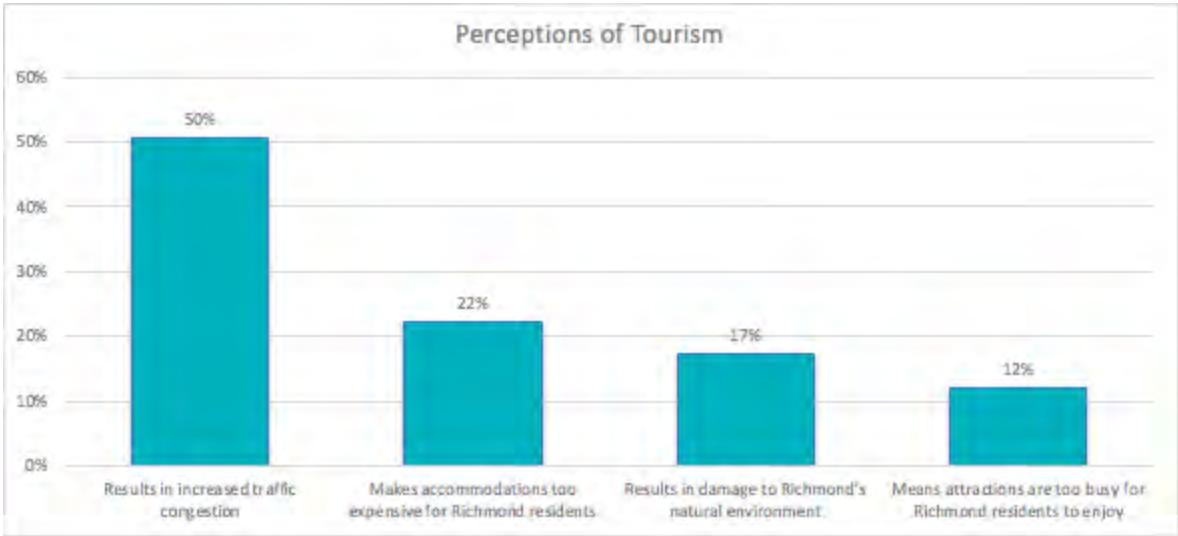
More than 90% of residents believe that tourism creates economic growth for the region, growth opportunities for businesses and employment opportunities for residents. Roughly eight in ten agree that tourism drives infrastructure development in the region, improves the local quality of life, drives improvements to recreational facilities in local communities and improves the Richmond region's cultural diversity. African American residents were less likely to agree that tourism improves local quality of life (74% vs 80%).



Q. From your perspective, to what extent do you agree or disagree with each of these statements? Tourism to the Richmond region ...

TOURISM'S NEGATIVE IMPACT

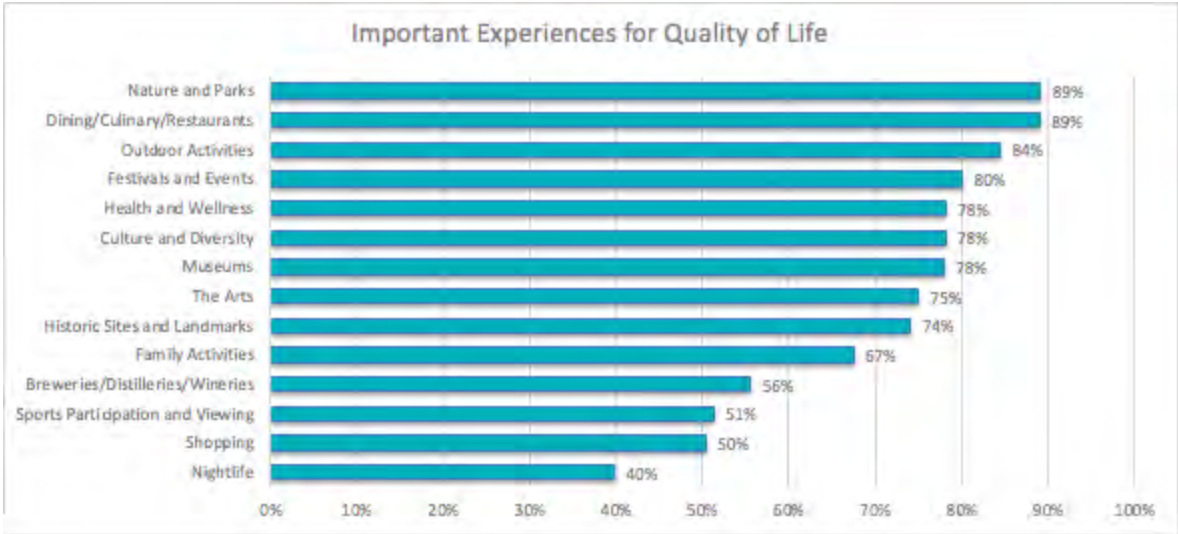
When asked about the potential negative impacts of tourism on the Richmond region, half of respondents indicated they believe tourism results in increased traffic congestion, while roughly two in ten agree that tourism makes accommodations too expensive for Richmond region residents or results in damage to the region's natural environment. African American residents were more likely to agree that tourism makes accommodations too expensive for Richmond residents (28% vs 22%) and less likely to agree tourism results in damage to Richmond's natural environment (12% vs 17%).



Q. From your perspective, to what extent do you agree or disagree with each of these statements? Tourism to the Richmond region ...

IMPORTANCE OF RICHMOND EXPERIENCES

Nearly nine in ten Richmond region residents feel that ‘nature and parks’ and ‘dining/culinary/restaurants’ are important to their quality of life. ‘Shopping’ and ‘nightlife’ were listed as the least important attributes to quality of life at 50% and 40% respectively. Younger residents (under 35) were more likely to list ‘breweries/distilleries/wineries’ as an important aspect to their quality of life (69% vs 56%) and less likely to list ‘museums’ (73% vs 78%), ‘historic sites and landmarks’ (66% vs 74%) and ‘family activities’ (54% vs 67%) as important. Older residents (55 and above) were more likely to list ‘historic sites and landmarks’ (82% vs 74%) as important. African american residents were more likely to rate ‘culture and diversity’ (94% vs 78%), ‘health and wellness’ (89% vs 78%) and ‘festivals and events’ (87% vs 80%) as important.



Q. How important are the following attributes to your quality of life as a resident of the Richmond region?

QUALITY OF RICHMOND EXPERIENCES

‘Dining/culinary/restaurants’ was rated by Richmond residents as the highest quality tourism experience in the region, followed by ‘museums’, ‘historic sites and landmarks’ and ‘the arts’. ‘nightlife’ and ‘sports participation and viewing’ were rated as the lowest quality experiences.



Q. How would you rate the overall quality of the following Richmond region experiences?

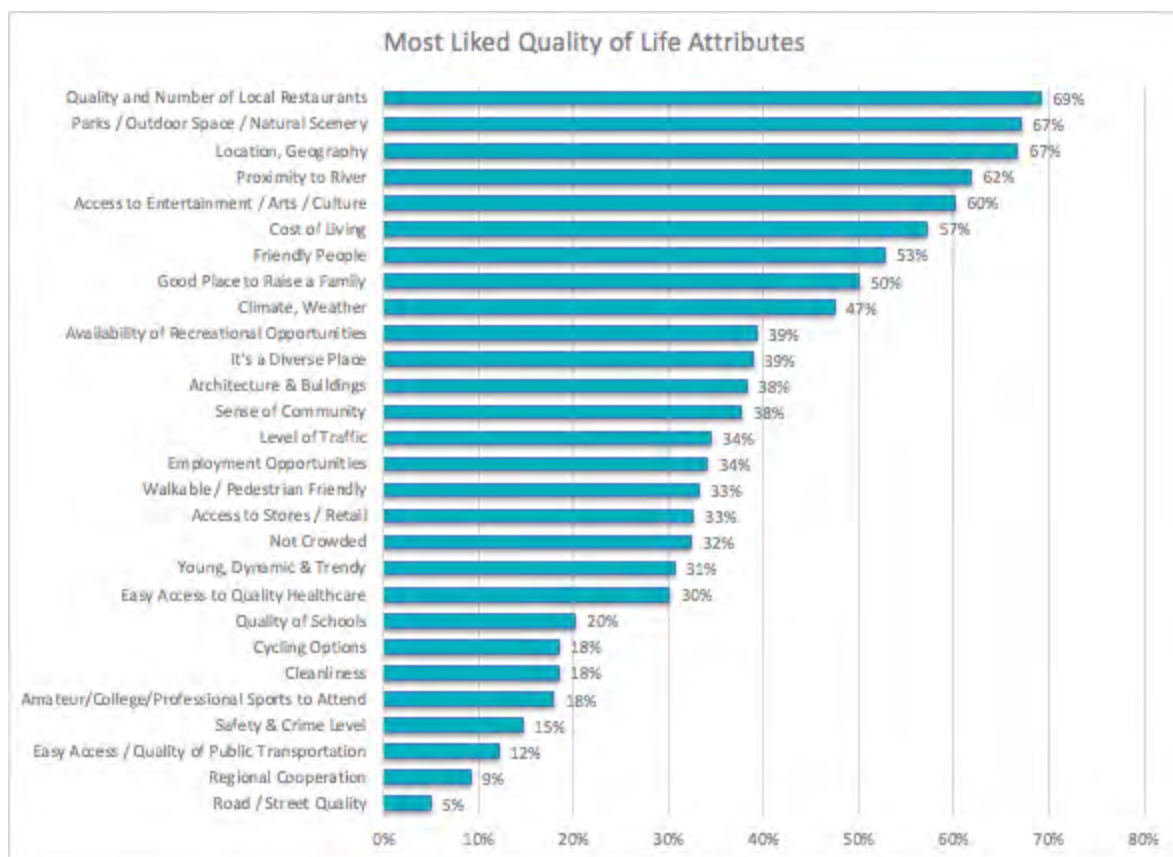
RICHMOND EXPERIENCES COMBINED

The chart below shows the intersection of Richmond region experiences in terms of importance and quality as rated by residents. Experiences in the upper-right quadrant were rated as important to local quality of life as well as quality experiences. Experiences in the lower-left quadrant were rated as less important to quality of life and of lesser quality.



QUALITY OF LIFE ASPECTS (MOST LIKED)

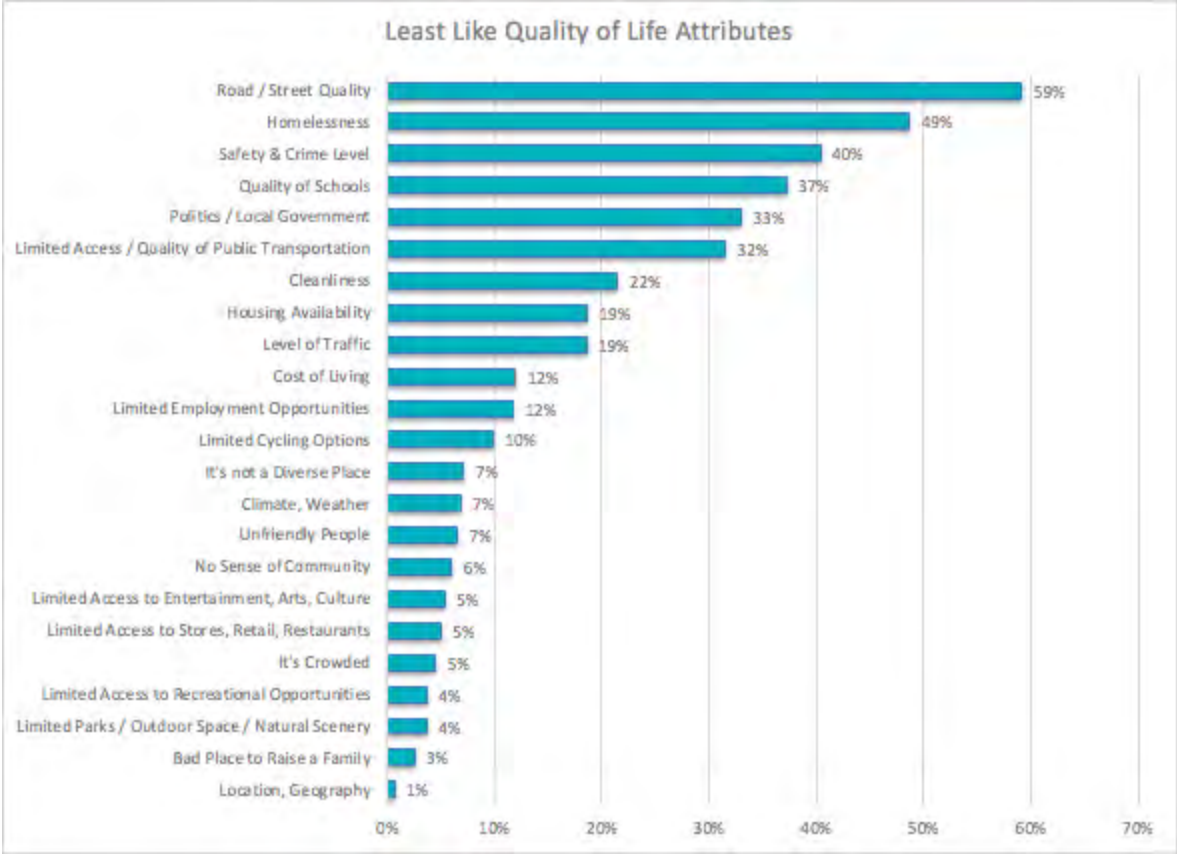
The quality and number of local restaurants was rated as the best thing about living in the Richmond region by residents, followed by parks/outdoor space/natural scenery, location/geography and proximity to the river. Not surprisingly, younger residents (under 35) were more likely to list ‘young, dynamic and trendy’ as one of the best things about living in the Richmond region at 54%. These younger residents were also more likely to list ‘proximity to the river’ (69% vs 62%), ‘sense of community’ (45% vs 38%) and ‘walkable/pedestrian friendly’ (43% vs 33%) as important. Older residents (55 and above) were more likely to list ‘access to entertainment/arts/culture’ (68% vs 60%), ‘easy access to quality healthcare’ (47% vs 30%), ‘architecture and buildings’ (44% vs 38%) as important.



Q. What are the BEST things about living in the Richmond region? Select all that apply.

QUALITY OF LIFE ASPECTS (LEAST LIKED)

Road/street quality, homelessness and safety and crime levels were listed as the least liked aspects of living in the Richmond region. Older residents (55 and above) were more likely to list ‘politics/local government’ (42% vs 33%) as a least liked aspect of living in the Richmond region. African American residents were more likely to list ‘homelessness’ (58% vs 49%), ‘quality of schools’ (48% vs 37%) and ‘housing availability’ (30% vs 19%) as a least liked aspect of living in the Richmond region.



Q. What do you like LEAST about the Richmond region? Select all that apply.



XXX RESONANCE

VANCOUVER

801-602 Hastings St W
Vancouver, BC V6B 1P2
info@resonanceco.com
+1.604.681.0804

NEW YORK

110 East 25th
New York, NY 10010
info@resonanceco.com
+1.646.233.1383