

**Savannah Tourism Sentiment Survey Summary: Resident and Tourism Professionals**

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## **Survey Summary Results**

The University of South Carolina Beaufort (USCB) Lowcountry and Resort Islands Tourism Institute (LRITI) conducted a survey of Savannah residents and businesses to assess both populations' sentiment toward tourism in Savannah, GA. The survey was designed utilizing standard methods in social science research and was piloted among researchers at USCB as well as the individuals from the City of Savannah and tourism industry professionals.

### ***The Resident Survey and their Sentiment toward Tourism***

The resident survey was designed to examine how residents feel about various aspects of tourism. The 26 question instrument contained quantitative and qualitative questions that focused on measuring the following residential perceptions toward tourism.

1. Frequency of visitor engagement.
2. Tourism's contribution to the economy.
3. Tourism management.
4. Tourism infrastructure needs.
5. How tourism impacts residents.
6. Tourism industry program needs.
7. Impacts of the tourism industry on life and the community.

In addition to the sentiment related items, demographic specific questions were asked in order to explore for differences by resident locations.

### ***The Resident Survey Method***

The registered voting list for the City of Savannah was utilized to access the survey population. Two thousand six hundred ninety-five residents were randomly selected from the following zip codes.

- 31401
- 31404
- 31405
- 31409
- 31415
- 31419
- 31421

The seven zip codes represent approximately 69,000 registered voters. There were four separate survey mailings to their home addresses. The surveys were then returned to USCB for data entry and analysis. Four hundred seven completed surveys were returned which yielded a 15% completion rate and an error of margin of + or - 5%.

### ***Savannah Resident Demographics***

Forty-two percent of the survey respondents resided in Midtown, while 24% lived in the Downtown Area, 17% Eastside, and 9% Southside. Seventy-five percent of the residents worked in Savannah's Historic Landmark District. Forty-six percent moved to Savannah 10 or more years ago and 38% were born and raised in the city. Eighty-four percent of the respondents owned their primary residence.

Sixty percent of the survey respondents were female, 57% were over the age of 60, and 58% were Caucasian. Fifty-six percent were married and 85% did not have children under 18 living at home. Over 65% had a Bachelor's Degree or higher, 42% were employed full-time, 35% had household incomes over \$75,000, and 59% indicated that their income was derived from the tourism industry.

***1. Savannah Resident Sentiment toward Tourism: Perceptions toward Frequency of Visitor Engagement***

Savannah residents are engaged with visitors mostly when visiting city parks and squares and dining at downtown restaurants. Fifty-seven percent indicated that they engage visitors several times a month, several times a week, or daily while visiting parks and squares and 46% indicated that they engage visitors several times a month, several times a week, or daily while dining at downtown restaurants. The frequency of visitor engagement decreases to never or occasionally when residents shop at downtown establishments, attend special events, visit historic sites, take local tours, and ride public transportation. Most residents (73%) do engage visitors some of the time, often, or all of the time during festivals or events. However, on an overall basis 33% engage visitors often or all the time.

***2. Savannah Resident Sentiment toward Tourism: Perceptions toward Tourism's Contribution to the Economy***

Savannah's residents have strong support for the tourism industry. Ninety percent of the residents believe that Savannah's Historic Landmark district has helped create a strong tourism industry for Savannah. Eighty-four percent indicated that they were proud that the city has become such a high profile destination. Eighty-two percent believe that the local tourism community contributes to the city's economic health, while 74% stated the tourism related tax revenues benefit residents.

***3. Savannah Resident Sentiment toward Tourism: Perceptions toward Savannah's Tourism Management***

Savannah residents encourage tourism in both the Historic Landmark District and greater Savannah. Seventy-three percent of the residents indicated that they are confident that tourism in Savannah's Historic Landmark District is positive and should be actively encouraged, and 73% are confident that the impact of tourism in Savannah is positive and should actively be encouraged. Ninety percent believe that the tourism industry is important to Savannah's future, while 75% feel that the positive benefits of tourism outweigh the negative impacts.

***4. Savannah Resident Sentiment toward Tourism: Perceptions toward Savannah's Tourism Infrastructure Needs***

The residents need more access to public restrooms and support improved wayfinding signage throughout the Historic Landmark District and the city. Eighty-three percent of the residents believe that additional public restroom facilities are needed in Savannah's Historic Landmark

District. Sixty-eight percent indicated that improved wayfinding signage is needed throughout the metro Savannah area, while the same amount of residents feel that improved signage is needed throughout Savannah's Historic Landmark District. Fifty-eight percent said that the greater Savannah area needs new visitor attractions.

#### ***5. Savannah Resident Sentiment toward Tourism: Perceptions toward How Tourism Impacts Residents***

Parking appears to be a problem for the majority of Savannah residents whereas 55% of the residents indicated that they are impacted by adequate parking opportunities. However, less than 50% of the population is impacted by variables related to vehicular and pedestrian congestion, public transportation, and noise from afterhour's commercial activities.

#### ***6. Savannah Resident Sentiment toward Tourism: Perceptions toward Savannah's Tourism Industry Program Needs***

Public safety, better communication, and enforcement of regulations are important. Ninety-six percent of the residents feel that programs related to public safety are important or extremely important to the success of the Savannah tourism industry. Ninety-four percent believe that communication between Savannah residents and Savannah city government is important and 91% indicate that the enforcement of regulations is important. Ninety-percent said that historic and cultural knowledge of Savannah by tour industry employees is also important.

### ***Resident Survey Conclusions for the Quantitative Survey***

Savannah residents are engaged with visitors mostly while visiting parks and squares as well as dining out. An overwhelming majority believe that the Savannah's Historic Landmark District has contributed to a strong tourism industry and are proud of Savannah's high tourism profile. Not surprisingly, this is supported by the large majority of residents that believe that tourism should be actively encouraged for both the Savannah Historic Landmark District and the greater Savannah. While there is strong support for tourism, residents also believe that programs supporting public safety are important to the success of the tourism industry. Lastly, the majority feel that communication between Savannah residents and the Savannah city government is important as well as the need to enforce regulations.

#### ***7. Savannah Resident Sentiment toward Tourism: Impacts of the Tourism Industry on Life and the Community***

An analysis of the open ended responses is provided in this section.

#### ***Positive Responses***

Generally, the residents of Savannah recognize the value of the tourism industry and the impact it has on their lives. Respondents continually praise the restaurants, shopping, and historic interests that thrive with the continued influx of tourists. Residents seem to understand that the

quality, number, and variety of the amenities the City of Savannah offers its visitors benefit the local population as well.

The economic benefit of a continued tourism presence is often commented upon in the responses, specifically that the local taxes raised from people visiting the city has great benefit to the lives of the people who live in Savannah. Tourism is perceived by the public as the significant economic driver it is, generating opportunities for employment and education for the community.

There is an undeniable pride in the positive responses to the survey. Respondents see Savannah as the representative of Coastal Georgia to the world, and enjoy the publicity it receives in the media, especially film and television programming set in their hometown. The public generally sees the city as clean, vibrant, and historically preserved...and like it that way. When asked for general comments that could be separated into “Pro” and “Con” categories, the positive comments outweighed the negative sentiments almost two to one.

### *Negative Responses*

When surveyed about the negative impacts of tourism on Savannah, crime and safety-related issues were not first on the list of respondent’s concerns for the status quo. Daily life seems to be most negatively impacted in Savannah by traffic – or at least that is the perception of the surveyed residents. The combination of local traffic, with high volumes of tourist traffic, tourism supported traffic (tour busses, trolleys, Slow Rides, etc.) and large numbers of pedestrians in tourism-centric locations is seen to be the main complaint of residents.

This is especially true for residential communities in and around historic/tourism areas. Where residents recognize the greater benefits to the community provided by the tourism industry, they are often dissatisfied when it encroaches on their personal lives, property, or amenities. When a Savannah resident cannot park in front of their home due to a perceived or actual high volume of tourists in their neighborhood, that level of frustration gets very personal, and becomes an attitude that is hard to change without relocation. It would be easy enough to dismiss these concerns with a shrug, as people who move into these communities are often aware of the problems they’ll face, but may find it hard to balance the attractions of the community with the amenities of the home.

While crime and safety issues are not the top of the list of concerns numerically, it would be hard to argue that safety is not more important than parking. It would, however, be seen that the day-to-day issues of the “hygiene” elements associated with traffic and parking encroach on the minds of average residents living their lives. Nonetheless, crime and safety issues, both real and perceived, must be addressed. There is a perception that more needs to be done, and there is a real concern that crime is the largest problem that the City of Savannah will have to address in the future. While efforts are always underway to reduce and prevent crime, the perception of Savannah as “crime-ridden” must be fought as well. When surveyed residents assume that tourism would be better if crime were lower, they perpetuate that perspective of a violent city to friends and neighbors, which will eventually make this perspective become truth, if it hasn’t already been proven so.

The safety and security of children and their future is a concern in all communities. Savannah residents note that next to crime, their concern for children in the community is that there is little to do in the way of educational or recreational activities – for both residents and tourists. The issues of crime/safety and children’s opportunities go hand-in-hand; the citizenry want to see more children or family-friendly offerings, but until there is a lower crime rate, or an increased perception of safety in the City of Savannah, these areas or ideas of development may have a hard time coming to fruition if tourists and residents alike do not feel safe bringing their children to Savannah.

There are specific comments in the responses that African-American communities are under-represented and under-valued in the City of Savannah. While there are no direct accusations of racism, the small, but relevant number of responses on this front seem to represent sentiments that probably could have been guessed at, but respondents offer no solutions to the perceived issue. While these kinds of feelings are usually deep-seated in many communities, the current political and social climates must be addressed in the near future, in order to help create, enhance and then maintain positive relationships in the community at large. Some comments from respondents hint at the notion that while the City of Savannah is doing much to maintain historical preservation, there is also a belief that it is doing much to reduce the negative stereotypes of the “Old South” mentality.

### ***Changes and Challenges***

Respondents’ perspectives on the future of the City of Savannah primarily focus on concerns about growth of the number of visitors in an area which already feels (by residents) to be too congested on surface streets already. Parking, buses, and traffic which poses real and perceived inconvenience to the everyday lives of Savannah residents, and responses seems to prove that people believe that problems on these fronts will only get worse unless significant infrastructure changes are made, or alternative solutions are posed.

On the issues of crime and safety, respondents may have expressed enough concerns regarding the status quo in hopes that future issues may be preemptively resolved, so there were significantly fewer comments on crime and safety as they pertain to the future of the City of Savannah. In this, it does not appear as if residents believe that there is a significant effect on the future of tourism.

The concerns about the future of tourism in the City of Savannah seem to be more about how the future impacts the residents, not how tourism itself will change, or has the potential to be changed in the future. The efforts relating the positive impacts and effects of tourism on the communities, and the, perhaps unseen, benefits to day-to-day life were largely missed by respondents to this survey.

### ***Who Makes an Impression on Residents?***

Some specific groups and activities were mentioned by respondents by name, some garnering both negative and positive feedback. SCAD is both seen to boost the economy, making the City

of Savannah attractive to visitors, while the traffic congestion created by their buses seems to be another handicap to accessibility in some areas.

The St. Patrick's Day celebrations are also events which receive responses from both ends of the gamut. It is recognized as being a significant attraction for visitors to Savannah, there is also a sentiment that the money spent by the city on these celebrations is on the losing side of a cost/benefit analysis in the eyes of some residents in the community.

Specifically mentioned, themed events that host artistic elements like the Savannah Film Festival or the Savannah Music Festival received only positive feedback in this survey of residents. While some of the negative feedback of overcrowding and congestion may be, in part, related to these events on an individual bases, the events themselves are seen as beneficial and rewarding to the Savannah community.

### ***Final Impressions***

In the end, the residential community at large seems to really love the City of Savannah in the amenities and attractions that they can experience regularly, and that tourists come to see on their travels. The benefits of tourism are sometimes lost in the day-to-day struggles with parking and accessibility, but for the most part, might be described by residents as a "necessary evil" in order to reap the rewards of a thriving tourism industry.

There is a great sense of pride in the responses gathered in this survey, and an eagerness to express the real and perceived problems in the community – which are mostly perhaps, delivered in honest concern for the future. What seems to be absent in the results are personal gripes, axes to grind, or noses bent out of shape. An overall impression is that the residents of the City of Savannah are taking the good with the bad, but hoping for positive change and growth in their community, built on the back of the income and input of the tourism industry.

### ***However, not all residents are equal in their tourism sentiment***

For the tourism sentiment items, a comparison was conducted whereas Downtown Residents were compared to all other Savannah neighborhoods. A significant difference existed between residents for 11 items. When comparing mean scores, Downtown Residents more so agree with that the local tourism industry contributes to better shopping, dining, and cultural opportunities, and that communication between Savannah residents and businesses is more important. However, Downtown Residents more so disagree with the statements that the city's current regulations effectively manage growth and that the city effectively enforces tours service for hire regulations. The following table lists the sentiment items as well as the mean score comparisons between Downtown Residents and all other Savannah Residents. An asterisk adjacent to the question item indicates that a significant difference was found when comparing the two populations.

Question Number	Question Item	Where do you reside in Savannah? (Downtown vs All Other Neighborhoods)	N	Mean
Q6	<b><i>*The local tourism community contributes to better shopping, dining, and cultural opportunities for Savannah's residents.</i></b>	<b><i>Downtown Neighborhood</i></b>	<b>95</b>	<b>4.01</b>
		<b><i>All Other Savannah Neighborhoods</i></b>	<b>295</b>	<b>3.83</b>
	The local tourism community contributes to the economic health of our community.	Downtown Neighborhood	95	4.20
		All Other Savannah Neighborhoods	296	4.03
	Tourism-related tax revenues for local government benefit residents and our community.	Downtown Neighborhood	95	3.87
		All Other Savannah Neighborhoods	296	3.91
Historic preservation of Savannah's Historic Landmark District has helped to create a strong tourism industry for Savannah.	Downtown Neighborhood	95	4.44	
	All Other Savannah Neighborhoods	297	4.34	
I am proud that Savannah has become such a high-profile visitor destination.	Downtown Neighborhood	93	4.22	
	All Other Savannah Neighborhoods	296	4.19	
Savannah should try to attract more visitors to our community.	Downtown Neighborhood	94	3.52	
	All Other Savannah Neighborhoods	297	3.81	
Q7	<b><i>*The City's current regulations effectively manage tourism growth.</i></b>	<b><i>Downtown Neighborhood</i></b>	<b>92</b>	<b>2.61</b>
		<b><i>All Other Savannah Neighborhoods</i></b>	<b>287</b>	<b>3.10</b>
	<b><i>*The City effectively enforces tour service for hire regulations (i.e., tours for hire, horse drawn carriages, pedicabs, taxicabs, and quadricycles).</i></b>	<b><i>Downtown Neighborhood</i></b>	<b>91</b>	<b>2.78</b>
		<b><i>All Other Savannah Neighborhoods</i></b>	<b>288</b>	<b>3.27</b>
	City officials listen and respond to residents about tourism issues.	Downtown Neighborhood	94	2.69
		All Other Savannah Neighborhoods	289	3.10
	It is difficult to access the decision making process to influence future tourism development in my community.	Downtown Neighborhood	90	3.62
		All Other Savannah Neighborhoods	285	3.27
	I am confident that long-term planning by the City will manage the impacts of tourism in our community.	Downtown Neighborhood	93	2.73
		All Other Savannah Neighborhoods	292	3.29
I am confident that the impact of tourism in Savannah is positive and should be actively encouraged.	Downtown Neighborhood	92	3.64	
	All Other Savannah Neighborhoods	292	3.85	
I am confident that tourism in Savannah's Historic Landmark District is positive and should be actively encouraged.	Downtown Neighborhood	93	3.63	
	All Other Savannah Neighborhoods	292	3.89	
I believe that Savannah is growing rapidly due to tourism.	Downtown Neighborhood	95	2.80	
	All Other Savannah Neighborhoods	292	2.70	
It appears that tourism has reached its capacity in the metro Savannah area.	Downtown Neighborhood	95	2.87	
	All Other Savannah Neighborhoods	289	2.67	
It appears that tourism has reached its capacity in Savannah's Historic Landmark District.	Downtown Neighborhood	95	3.12	
	All Other Savannah Neighborhoods	291	2.71	
Q8	Overall, I believe the tourism industry is important to Savannah's future.	Downtown Neighborhood	94	4.19
		All Other Savannah Neighborhoods	293	4.27
Overall, the positive benefits of tourism outweigh the negative impacts of tourism.	Downtown Neighborhood	94	3.73	
	All Other Savannah Neighborhoods	291	3.96	

Q9	Additional public restroom facilities are needed in Savannah's Historic Landmark District.	Downtown Neighborhood All Other Savannah Neighborhoods	95 294	3.99 4.14
	<b>*Improved wayfinding signage is needed throughout the metro Savannah area.</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>92 292</b>	<b>3.52 3.82</b>
	<b>*Improved wayfinding signage is needed throughout Savannah's Historic Landmark District.</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>89 292</b>	<b>3.43 3.77</b>
	<b>*The greater Savannah area needs new visitor attractions (Family activities, museums, etc.).</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>95 292</b>	<b>3.11 3.68</b>
	Savannah's Historic Landmark District needs new visitor attractions (Family activities, museums, etc.).	Downtown Neighborhood All Other Savannah Neighborhoods	95 293	2.84 3.42
Q10	<b>*Noise from afterhours commercial activities.</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>93 290</b>	<b>2.60 1.85</b>
	Vehicular congestion during special events.	Downtown Neighborhood All Other Savannah Neighborhoods	95 293	3.72 3.18
	Pedestrian congestion during special events.	Downtown Neighborhood All Other Savannah Neighborhoods	94 291	3.14 2.83
	Congestion due to tour vehicles.	Downtown Neighborhood All Other Savannah Neighborhoods	95 290	3.46 2.82
	Adequate public transportation.	Downtown Neighborhood All Other Savannah Neighborhoods	92 291	2.26 2.31
	Adequate parking opportunities.	Downtown Neighborhood All Other Savannah Neighborhoods	92 287	3.71 3.49
	Street/Sidewalk sanitation of residential areas.	Downtown Neighborhood All Other Savannah Neighborhoods	93 289	3.49 2.95
	Street/Sidewalk sanitation of commercial areas.	Downtown Neighborhood All Other Savannah Neighborhoods	93 291	3.32 2.85
	Protection of the natural environment.	Downtown Neighborhood All Other Savannah Neighborhoods	94 290	3.66 3.26
Q12	Formal hospitality and tourism education at the high school, trade school, and college levels.	Downtown Neighborhood All Other Savannah Neighborhoods	93 287	3.86 3.80
	Hospitality training of current industry employees.	Downtown Neighborhood All Other Savannah Neighborhoods	94 288	4.15 4.09
	<b>*Increased marketing of Savannah as a visitor destination.</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>94 286</b>	<b>3.65 3.97</b>
	<b>*Small business development for tourism-related businesses.</b>	<b>Downtown Neighborhood All Other Savannah Neighborhoods</b>	<b>93 286</b>	<b>3.80 4.05</b>
	Visitor Centers.	Downtown Neighborhood All Other Savannah Neighborhoods	94 287	3.91 4.08
	Historic and cultural knowledge of Savannah by tour industry employees.	Downtown Neighborhood All Other Savannah Neighborhoods	95 288	4.51 4.29
	<b>*Tourism attraction development.</b>	<b>Downtown Neighborhood</b>	<b>94</b>	<b>3.55</b>

	<i>All Other Savannah Neighborhoods</i>	<b>285</b>	<b>3.97</b>
<b>*Communication between Savannah residents and Savannah tourism businesses.</b>	<b><i>Downtown Neighborhood</i></b>	<b>93</b>	<b>4.30</b>
	<b><i>All Other Savannah Neighborhoods</i></b>	<b>289</b>	<b>4.28</b>
Communication between Savannah residents and Savannah City government.	Downtown Neighborhood	94	4.63
	All Other Savannah Neighborhoods	288	4.47
Enforcement of regulations.	Downtown Neighborhood	95	4.53
	All Other Savannah Neighborhoods	289	4.36
Public safety	Downtown Neighborhood	93	4.70
	All Other Savannah Neighborhoods	288	4.66

### ***The Tourism Professional Survey and their Sentiment toward Tourism***

The resident survey was designed to examine how residents feel about various aspects of tourism. The 25 question instrument contained quantitative and qualitative questions that focused on measuring the following residential perceptions toward tourism.

1. Frequency of visitor engagement.
2. Tourism's contribution to the economy.
3. Tourism management.
4. Tourism infrastructure needs.
5. How tourism impacts businesses.
6. Tourism industry program needs.
7. Future opportunities and challenges.

### ***The Tourism Professional Survey Method***

Eight hundred sixty email addresses of upper management tourism personnel and tour operators were randomly selected from 1,569 addresses. The addresses were provided by the Tourism Leadership Council. Seven hundred thirty-three addresses were sent invitations to participate in the online survey. One hundred seventy-three surveys were returned which was a 24% response rate having a + or – 7% margin of error. One hundred fifty-nine surveys were considered completed surveys.

### ***Tourism Professional Demographics***

Forty percent moved to Savannah 10 or more years ago and 28% were born and raised in the City. Eighty-four percent of the respondents owned their primary residence. Twenty-nine percent resided in the Downtown Area while 79% worked in the Historic Landmark District. Fifty-seven percent were tour guides, while 17% worked in the lodging sector. Thirty-four percent worked in businesses with less than 10 employees.

Fifty-four percent of the survey respondents were female, 50% were over the age of 50, and 92% were Caucasian. Sixty-two percent were married and 66% did not have children under 18 living at home. Sixty-nine percent had a Bachelor's Degree or higher, 84% were employed full-time, and 47% had household incomes over \$75,000.

#### ***1. Professionals' Sentiment toward Tourism: Perceptions toward Frequency of Visitor Engagement***

Eighty-five percent indicated that they engage visitors often or all the time during the week and 72% or more engage visitors often or all the time during festivals, on the weekends, and during holidays. Overall, 86% of the tourism professionals engage visitors often or all the time.

## ***2. Professionals' Sentiment toward Tourism: Perceptions toward Tourism's Contribution to the Economy***

Tourism professionals have strong support for the tourism industry. Ninety-six percent of the professionals believe that Savannah's Historic Landmark district has helped create a strong tourism industry for Savannah. Ninety-six percent also agree or strongly agree that the local tourism community contributes to the economic health of the community. The same percentage of professionals is also proud that Savannah has become a high-profile visitor destination. Eighty-two percent of professionals believe that the City should try to attract more visitors to the community and 78% feel that the tourism-related tax revenues for local government benefit residents and the community.

## ***3. Professionals' Sentiment toward Tourism: Perceptions toward Savannah's Tourism Management***

Tourism professionals are confident that the impact of tourism is positive, whereas 90% agree or strongly agree that tourism should be actively encouraged. Eighty-seven percent encourage tourism in the Historic Landmark District. However, 44% of the professional population believe that it is difficult to access the decision making process to influence future tourism development, and 41% believe that the City effectively enforces tour service for hire regulations. Overall, 97% of the professionals agree or strongly agree that the tourism industry is important to Savannah and 90% feel that the positive benefits of tourism outweigh the negative impacts.

## ***4. Professionals' Sentiment toward Tourism: Perceptions toward Savannah's Tourism Infrastructure Needs***

The tourism professionals believe that the City needs more public restrooms and that the greater Savannah area needs new visitor attractions. Eighty-eight percent of the professionals believe that additional public restroom facilities are needed in Savannah's Historic Landmark District. Seventy-two percent indicated that the greater Savannah area needs new visitor attractions. Tourism professionals are also concerned with wayfinding signage whereas 68% feel that improved signage is needed throughout metro Savannah and 65% believe that signage improvement is needed in the Historic Landmark District.

## ***5. Professionals' Sentiment toward Tourism: Tourism Industry Impacts on the Professionals***

Parking appears to be a problem for the majority of tourism professionals whereas 57% indicated that they are impacted by adequate parking opportunities. Fifty percent also feel that protection of the natural environment has a high or very high impact on them. Conversely, 20% of the professionals indicate that vehicle congestion has a high or very high impact, 11% feel that adequate public transportation has impact, and only 10% feel that noise from afterhours commercial activities has impact.

## ***6. Professionals' Sentiment toward Tourism: Perceptions toward Savannah's Tourism Industry Program Needs***

Public safety, historic and cultural knowledge, better communication, and enforcement of regulations are important. Ninety-six percent of the professionals feel that programs related to public safety are important or extremely important to the success of the Savannah tourism industry. Ninety-five percent believe historic and cultural knowledge of Savannah by tour industry employees is important. Ninety-one percent feel that communication between Savannah residents and Savannah tourism businesses is important and 90% believe that communication between residents and City government is important. Ninety percent indicate that the enforcement of regulations is important.

### ***Tourism Professional Survey Conclusions for the Quantitative Survey***

Overwhelmingly, tourism professionals believe that historic preservation of the City's Historic Landmark District has helped create a strong tourism industry and that the tourism community contributes to the economic health of the community. The tourism professionals have great pride in Savannah's high profile. Overall the tourism professionals believe that the industry is important to Savannah's future. However, the professionals believe that new attractions are needed in the greater Savannah area to attract new visitors and that wayfinding signage is needed in both the metro area and the Historic Landmark District. Lastly, public safety is also a major concern by the tourism professionals whereas nearly all consider it important toward supporting a successful industry.

## ***7. Professionals' Sentiment toward Tourism: Future Opportunities and Challenges for the Tourism Industry***

An analysis of the open ended responses is provided in this section.

### ***Positive Responses***

Generally, people seem to like the general look of the city. Cleanliness and attractiveness were routinely praised by respondents to this survey. This reaction is powerful, as this perception comes from everyday experiences of business owners as move through the city on a daily basis. Cleanliness may not often be perceived by visitors to the community, but the absence of cleanliness or routine cleaning can influence overall experiences to any region.

Multiple responses about the Historic District, historic preservation, reflect that the respondents see that the value of the city's historic interests are crucial to the tourism industry, and are encouraged by the efforts made toward preservation. The more the City of Savannah can do to encourage these feelings of goodwill, pride, and value in the historic preservation of the city, its history and it culture, will generate more of these kinds of responses, contributing to a continuing development of pride and even municipal morale in local business owners.

Both the cleanliness of the City of Savannah and its efforts to maintain and preserve its history and culture are seen as influential in attracting and retaining tourism, benefitting a large part of the local community.

### ***Negative Responses***

The responses that were received in this survey validate what might be guessed at, in that they reflect significant frustration with traffic and parking in general, reflecting some infrastructure issues regarding accessibility to local businesses. Many of the responses reflect a perception that it is the tourism industry – tour busses as obstacles, and volume of tourists with difficulty finding their way – that is contributing to the overall congestion to surface streets.

One notable trend in the responses is a series of comments regarding the tour busses and trolleys in the city. While busses and trolleys may be separately managed, their industry as a whole seems to be “painted with the same brush”, generating some negative comments. There are complaints ranging from the effect of the busses in traffic (adding to traffic congestion concerns) to others that doubt the reliability or veracity of the content delivered on the tours, to concerns that some historical areas, events, and populations are underrepresented on the tours.

It may be surprising that current concerns about crime and safety were mentioned about half as often as concerns about traffic. This may be deceiving, however, as this issue is not the top *current* concern, it is top *future* concern, which may show that respondents perceive crime and issues of personal safety to be on the rise, and will need to be perceived to be more proactively addressed by the City of Savannah in the future. The feeling of safety, whether real or perceived, needs to be fostered for general satisfaction in any community, and promoted by leaders to residents, visitors, and developing commercial interests.

### ***Changes and Challenges***

When reviewing the responses regarding challenges facing the future of the City of Savannah, crime and safety issues lead the list of respondents’ concerns. The perception of a higher-than-average number of homeless or panhandlers seem to fuel these concerns – not the general concerns of gun violence or property theft which are general concerns on a national scale. This specific issue was raised again and again in the comments received, which may not be surprising, as this is the kind of issue that directly affects foot traffic. The impact of the public perception of the homeless or of panhandlers on those business owners in the community that depend on their customers’ comfort and confidence to walk the streets may be significant, as the fears raised may or may not be valid, but still must be addressed, as these are issues of personal attitude, opinion and perspective.

Even if these attitudes are not necessarily based on facts, but feelings, they are no less valid as they affect and even change the behaviors of those who hold them. The idea that a customer could possibly be approached, accosted, or assaulted by the homeless or panhandlers is enough to discourage foot traffic in commercial areas.

Another concern for the future is the idea that the more the City of Savannah grows and develops the city will lose its historic value and charm. A repeated concern for the economic environment is that the small business community and opportunities will shrink, as larger national and international concerns encroach on those industries and communities long held by smaller, locally-owned operators. The sentiment seems to be that while changes and additions to the tourism industry are needed, they also need careful management to reflect the needs and wants of the local community, while attracting the number of visitors the community can infrastructure can support.

### ***Future Opportunities and Optimism***

When asked to contribute ideas for opportunities the City of Savannah should investigate and pursue in regards to tourism, several themes were introduced and repeated. There is a level of optimism in the overwhelming number of responses using the word “more” – more hotels, more children/family friendly activities, more opportunity for tourism from cruises are repeated themes. There are some concerns raised as the opportunities present themselves. While many respondents want to see growth, there are concerns about the overdevelopment of tourism attractions without the further development of infrastructure changes – business owners in Savannah would want to see changes addressing traffic congestion that would solve the perceived problems of their clientele’s ability to reach their establishments.

Locals vs. Tourists: It would be impossible to dispute the importance of tourism for the City of Savannah, however, there were some comments received that show that there is some local discontent with the volume and behavior of the visitors to this community. The idea of an “us vs. them” mentality can be destructive in a community so dependent on the new and returning tourism dollar. It is the basic infrastructure issues of parking and traffic, with and without pedestrians, that are most often perceived by the survey’s respondents, generating the negative feedback.

Constructive suggestions were offered by respondents regarding clarity of traffic signs for both foot and vehicle traffic, especially in those high-volume congested areas like the Historic District.

### ***What’s Missing***

In looking through the data, there’s an underlying theme that is notable by its absence. There is very little mention of any governmental body which is affecting tourism or the tourism industry, in either a positive or negative fashion. Taken in whole, the responses have a significant level of complaint, but the complaints are level toward small groups or general populations. This may reflect a feeling that local government is either doing little to help or hinder the efforts of business owners who benefit from tourism, or it may show that there is a perceived lack of control or influence in the issues that most concern business owners and operators in the City of Savannah.

In a survey like this, where comments and criticism are encouraged, it could easily have been an opportunity to criticize local governmental operations, but this was generally not true.

Respondents seem to have very specific ideas about the issues that affect them on a day-to-day basis, but do not seem to hold the City and its officials as either the scapegoat or savior for their concerns.