



NC[®]

north carolina

**2023 Brand & Image Position
- Blowing Rock -**

July 2023

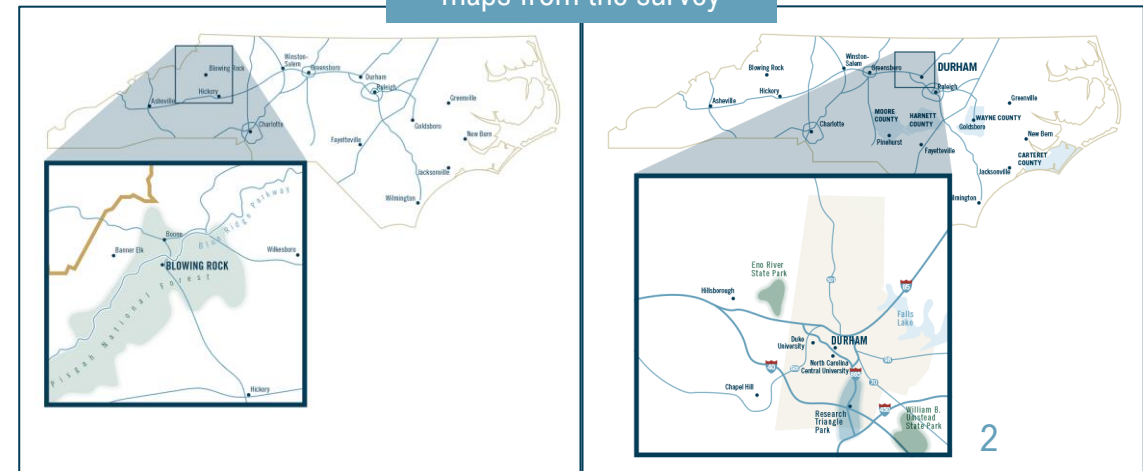
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Objectives & Methodology

- The survey was designed to measure the individual brand and image of 6 destinations in North Carolina in competitive context. Other research goals include:
 - Assess the overall image of each partner destination.
 - Identify key attributes/perceptions of each destination including strengths and weaknesses.
 - Profile visitors and travel behavior in the destination.
- In order to achieve this, SMARInsights surveyed 2,859 travelers in the target markets listed with the goal of surveying a minimum of 400 familiar consumers per partnering destination. Respondents were shown maps of each destination in order to aid familiarity. Examples of the maps are shown to the right.
- Data collection was via an online survey. National sample providers with demographically representative respondents were used so that the research results can be projected to the population.
- Data collection was from June 16 to 29, 2023.
- After data collection, the results were cleaned, coded and weighted to the target market population distribution.

Market	Completed Surveys
North Carolina	502
Mid-Atlantic Virginia, DC, MD, West Virginia, New York City, Philadelphia	796
South South Carolina, Kentucky, Tennessee, Georgia, Florida	1,015
Midwest Ohio, Indiana, Michigan, Illinois	546
Total	2,859

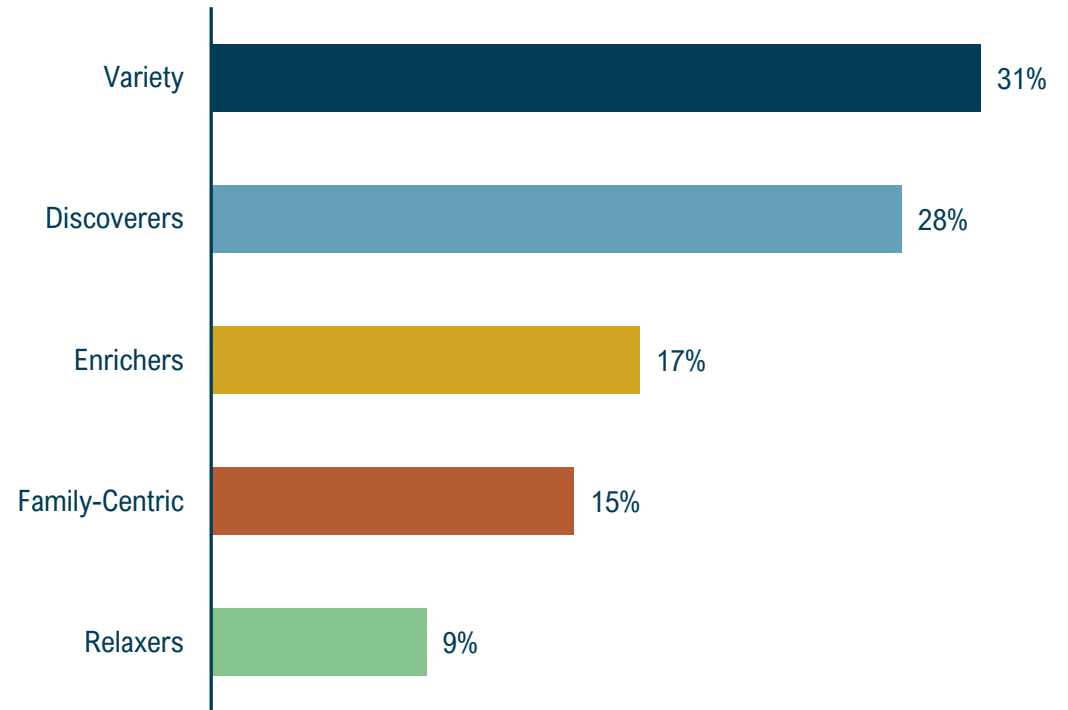
Sample of the destination maps from the survey



Segmentation Review

- The visitor segments were established in the 2022 North Carolina Awareness Wave 1. Segments were identified based on their travel preferences and behaviors using factor analysis. The exercise yielded 5 segments.
- **Variety** | People who like to do a little bit of everything during their leisure trip. They prefer curated itineraries.
- **Discoverers** | Visitors who prefer to be off the beaten path, staying active, and finding fulfillment through traveling to new places.
- **Enrichers** | This group prefers to delve into the culture of the destination through educational experiences, local cuisine, and living like a local.
- **Family-Centric** | Families focused on creating memorable experiences and spending quality time with one another.
- **Relaxers** | Travelers who prioritize relaxation. This is achieved by doing as little as possible during their getaways.

Distribution of Traveler Segments to North Carolina Destinations



Insights

63%

of consumers rate Blowing Rock as an excellent or good destination.

Destination Image

- 22% of consumers in target markets are familiar, with 11% visiting Blowing Rock in the past 5 years.
- 34% of travelers are likely to visit in the next 12 months.
- Discoverers and Enrichers gave the strongest destination ratings among the travel segments.

Idyllic and Serene

Blowing Rock scores well for both groups of destination attributes.

Image Strengths

- Blowing Rock is most recognized for its natural beauty, parks, outdoor recreation, and small towns.
- The image of Blowing Rock is similar to that of its biggest in-state competitor, Highlands.
- In terms of destination personality, Blowing Rock is considered relaxed, serene, charming, friendly, and welcoming.
- There is an opportunity to promote the destination's culinary scene, rich history, romantic vibe, and extraordinary personality as defined by the driver analysis.

57%

of visitors had an excellent trip to Blowing Rock, an exceptionally high rating.

Trip Profile

- 77% of the trips are leisure. Leisure consumers tend to stay longer and use paid accommodations.
- Many consumers prefer overnight trips, which represent 85% of all trips.
- The average visitor stays 3.6 nights and there are many repeat trips.

Image Review

A person with short dark hair, wearing a dark long-sleeved shirt and a light-colored backpack, stands with their back to the camera on a balcony or walkway. They are looking out over a city skyline across a body of water. The image is overlaid with a semi-transparent topographic map showing contour lines and elevation numbers (e.g., 320, 330, 340, 350, 360, 370, 380, 390, 400, 410, 420, 430, 440, 450, 460, 470, 480). The overall color palette is a cool, monochromatic blue.

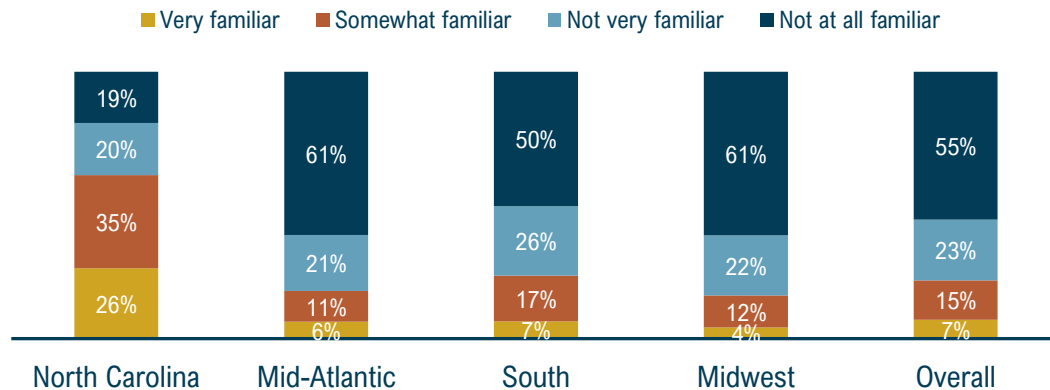
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Familiarity and Visitation

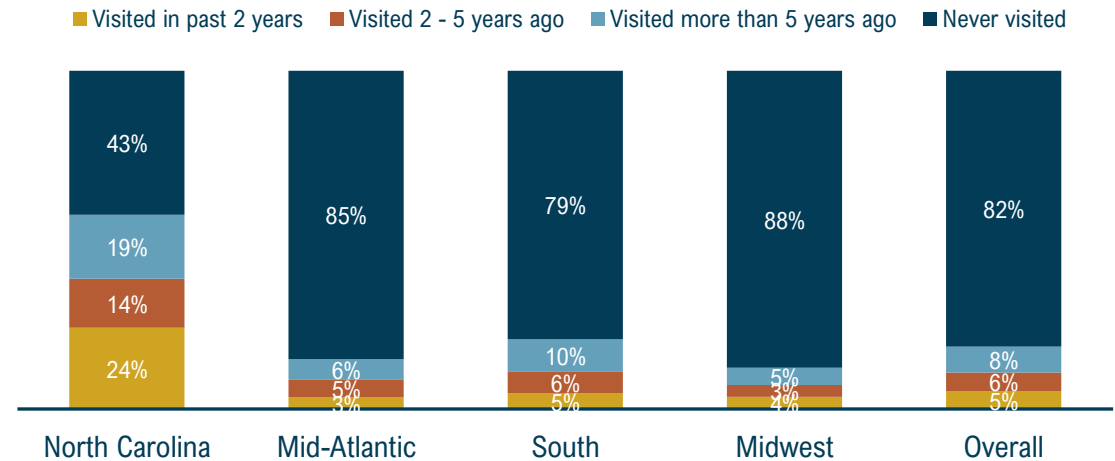
Overall, 22% of travelers are familiar with Blowing Rock and 11% have visited in the past 5 years.

- Familiarity with Blowing Rock, and consequently visitation, is highest in North Carolina and the South in general.
- A quarter of travelers in North Carolina state that they are familiar with Blowing Rock as a destination, and in-state visitors dominate in terms of past visitation.

Familiarity with Blowing Rock as a Destination by Market



Recent Visitation to Blowing Rock

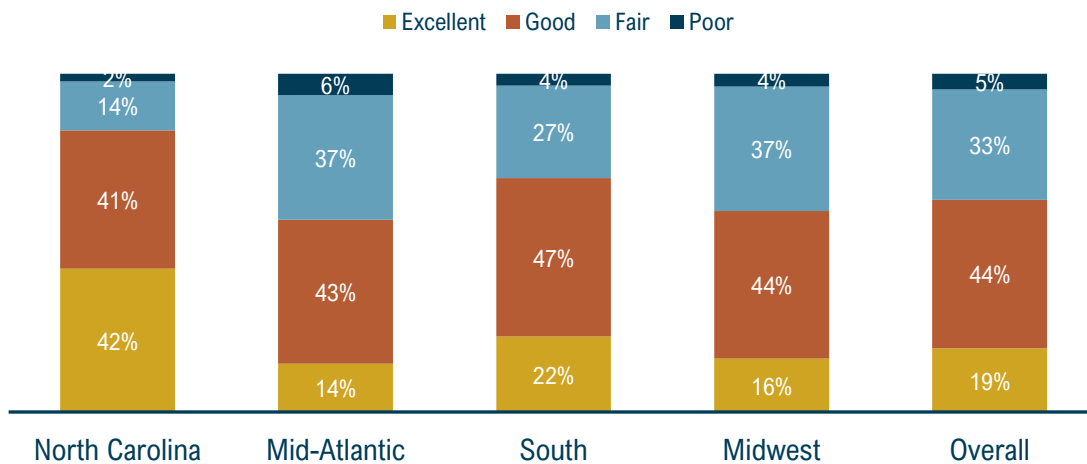


Destination Rating

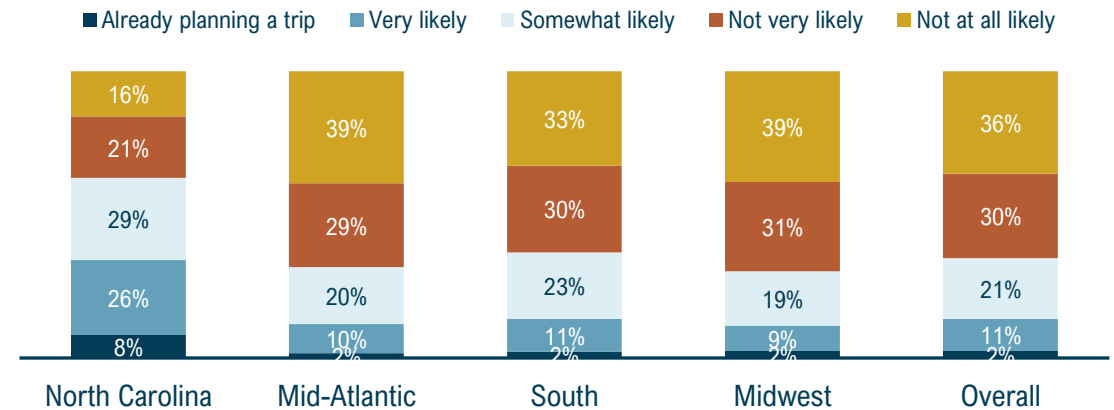
63% of consumers rate Blowing Rock as good or excellent destination, with a third likely to visit or are already planning a trip.

- Blowing Rock is highly rated by consumers across the markets with highest ratings coming from North Carolina (83%) and the South (69%).
- Two-thirds of consumers in North Carolina are likely to visit or already planning a trip, nearly double the overall rate.

Blowing Rock's Destination Rating



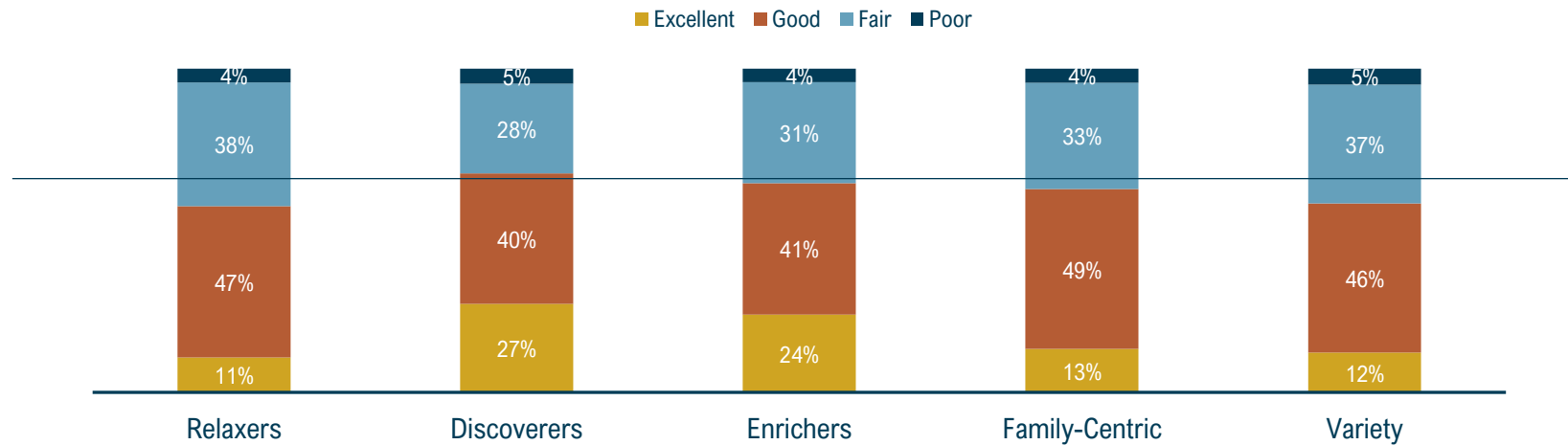
Likelihood to Visit Blowing Rock in the Next 12 Months



Destination Rating by Segment

Roughly two-thirds of Discoverers or Enrichers rate Blowing Rock as excellent or good.

Blowing Rock Destination Rating by Travel Segment



Destination Image



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Destination Image Composite Scores

Blowing Rock scores well as an idyllic and serene place with a composite score of 4.4.

- Blowing Rock is perceived as a place with natural/mountain beauty, access to outdoor recreation, and small towns/main streets that give travelers the opportunity to de-stress and feel inspired. In fact, Blowing Rock received the highest rating for mountain scenery among all destinations.
- *Process: Each destination was rated using a 5-point scale for individual destination attributes (beautiful scenery, great place to be inspired, etc.). These attributes were then placed into buckets via factor analysis, producing a handful of groups. Last, the destinations were given a composite score, which represents the mean score of the subgroup attributes.*



Idyllic: 4.4

1. Beautiful scenery: 4.8
2. Parks and natural areas: 4.5
3. Active outdoor recreation: 4.5
4. Great place to be inspired: 4.5
5. A place where I can disconnect from the stresses of everyday life: 4.5



Serene: 4.4

1. Mountain scenery: 4.7
2. Small towns and main streets: 4.4
3. Off the beaten path: 4.1



Historic: 4.1



Vibrant: 3.7

Image Comparison

Blowing Rock and Highlands have highly competitive images.

- Blowing Rock and Highlands share many characteristics including mountainous locales, beautiful scenery, small towns/main streets, and access to parks. The difference in mean ratings and composite scores reflect this similarity.
- Blowing Rock has a slight edge for many of its top image attributes including +0.2 difference for beautiful scenery, active recreation, and mountain scenery.

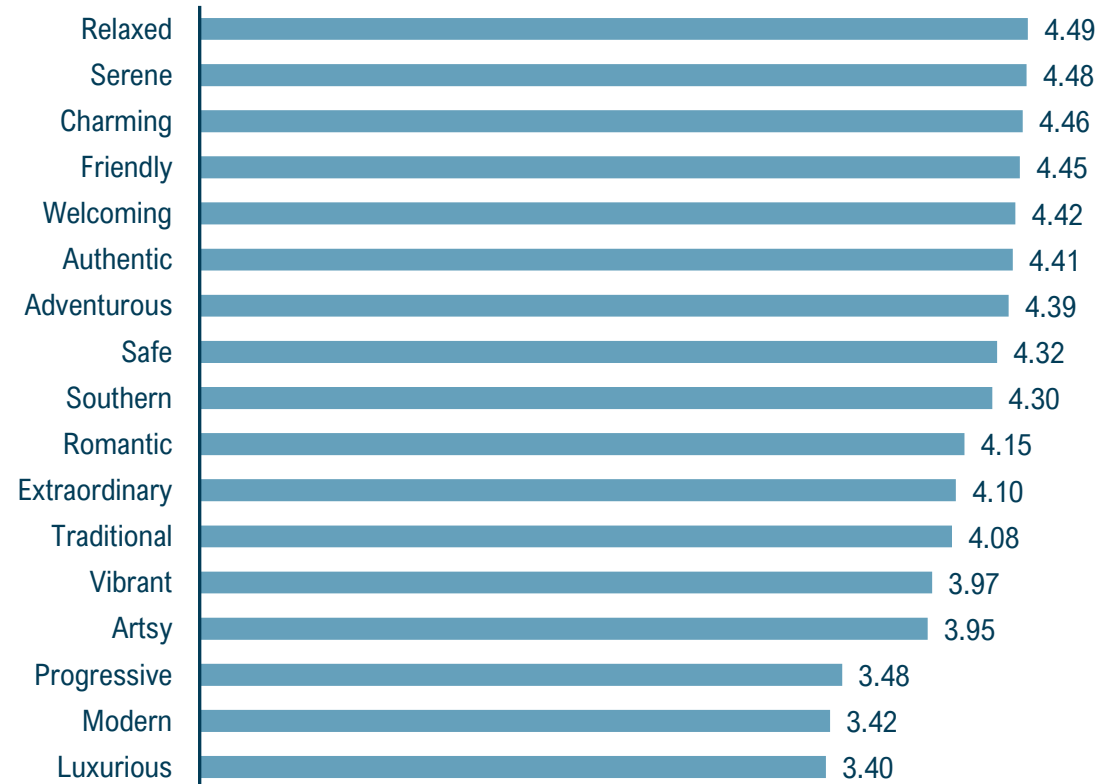
Attribute Group	Destination Attribute Mean (5-pt Scale)	Blowing Rock	Highlands	Difference
Idyllic Composite		4.4	4.3	0.1
	Beautiful scenery	4.8	4.6	0.2
	Parks and natural areas	4.5	4.4	0.1
	Active outdoor recreation	4.5	4.3	0.2
	Great place to be inspired	4.5	4.4	0.1
	A place where I can disconnect from the stresses of everyday life	4.5	4.4	0.1
Serene Composite		4.4	4.3	0.1
	Mountain scenery	4.7	4.5	0.2
	Small towns and main streets	4.4	4.3	0.1
	Off the beaten path	4.1	4.2	-0.1

Personality of Blowing Rock

Blowing Rock is a relaxed, serene, and charming place.

- Blowing Rock is a place of natural beauty in a mountainous landscape. This setting, along with feelings of inspiration and de-stressing, allude to the personality attributes with highest mean scores. These include relaxed, serene, charming, friendly, and welcoming.
- Travelers were less likely to perceive Blowing Rock as progressive, modern, or luxurious, each scoring below 3.5.

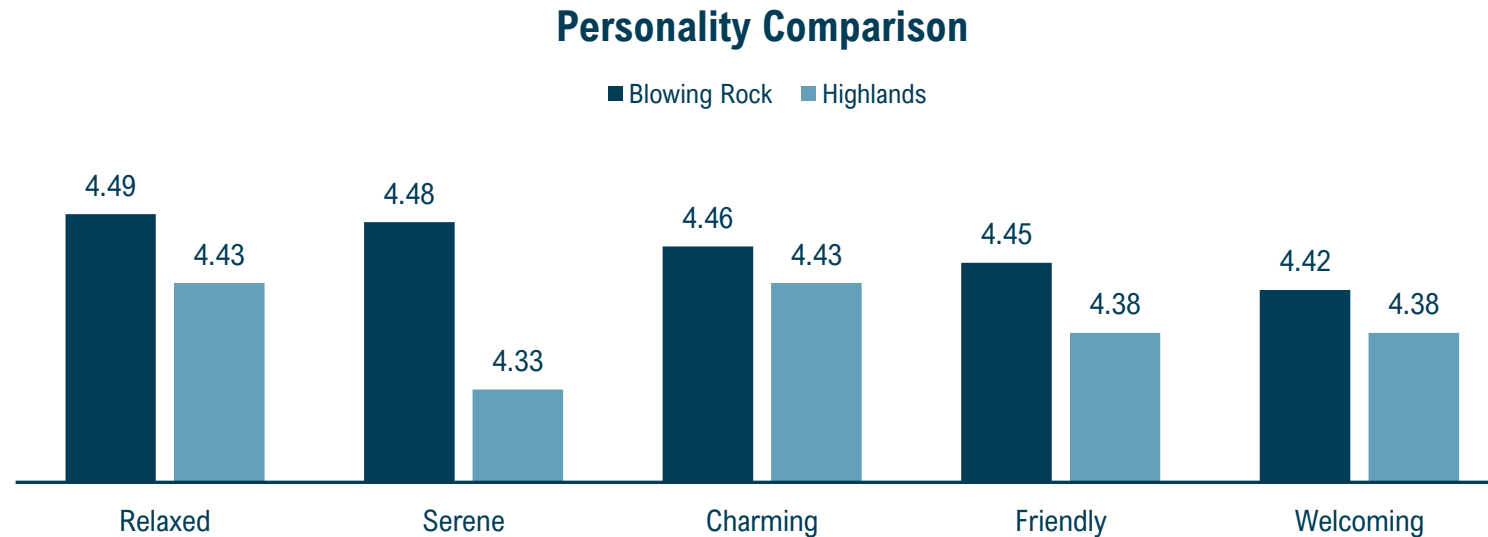
Personality of Blowing Rock
5-pt Scale



Personality Comparison

Blowing Rock and Highlands evoke similar destination personalities.

- As with destination image, the personality of Blowing Rock and Highlands is fairly similar, with Blowing Rock having a 0.15 edge for “serene.”



Gap Analysis

The gap analysis highlights an opportunity to expand marketing of Blowing Rock as a picturesque town with independent shops, friendly atmosphere, and abundant outdoor activities.

- The gap between travelers and recent visitors highlight opportunities for greater marketing.
- The table shows the destination attributes and personality ratings with the most significant gaps. Many of these attributes are highly rated (4.5+) by visitors.
- Given the high levels of trip satisfaction, consider expanding marketing efforts that highlight these assets, which include local shops, charming, active outdoor recreation, and welcoming.

Destination Attributes and Personality Ratings (5-point scale)	Non-Visitors	Visitors (Within 5 years)	Gap
Romantic	4.0	4.3	0.4
Vibrant	3.8	4.1	0.4
Great food scene	3.8	4.1	0.3
Cultural attractions	3.8	4.1	0.3
Local, independent shops	4.2	4.5	0.3
Charming	4.3	4.6	0.3
Active outdoor recreation	4.4	4.7	0.3
Safe*	4.2	4.5	0.3
A place I would be excited to visit on for a leisure trip*	4.2	4.5	0.3
Rich history	4.0	4.3	0.3
Welcoming	4.3	4.5	0.3

*Safety and being excited to visit a destination are more diagnostic indicators than they are assets worth promoting. These types of attributes play a larger role when comparing two similar places that differ based on secondary attributes.

Key Driver Analysis



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Driver Analysis

What is a driver analysis?

- The following key driver analysis identifies what messages create differentiation and opportunities for Blowing Rock to attract visitors and gain market share.
- Attributes are classified into 4 groups. Each group has varying degrees of marketing potential based on importance and destination ratings. Importance is determined by a combination of correlation with overall rating and correlation with visitation.
- **Strengths to Maintain:** These are weak drivers that are competitive strengths.
- **Strengths to Promote:** These are strong drivers that are competitive strengths.
- **Items to Ignore:** These are weak drivers and competitive weaknesses. These attributes might have niche appeals, but do not offer potential for mass marketing messaging.
- **Unlikely to Motivate Travel:** These are strong drivers that are current competitive weaknesses and represent the gaps in asset arsenal.



Driver Analysis

- The destination assets and personality attributes in the right two quadrants provide the most opportunity for generating interest in visiting Blowing Rock.
- The **strengths to promote** are existing assets that provide the most marketing potential. These include many, many attributes but there are a few that come to the top (see highlights) including a place to get excited about, active outdoor rec, beautiful/mountain scenery, and local independent shops.
- The **opportunities for growth** represent existing gaps to be filled and contain just a few destination attributes: extraordinary, food scene, rich history, and romantic.
- The **strengths to maintain** are aspects that drive visitation among familiar visitors and will increase visitation as awareness of these strengths improves through marketing initiatives.
- The **unlikely to motivate travel** are current weaknesses compared to competitors or destination attributes that contribute little to motivation of travel to the destination. This box contains several attributes but many vibrant image attributes.



Trips Profile

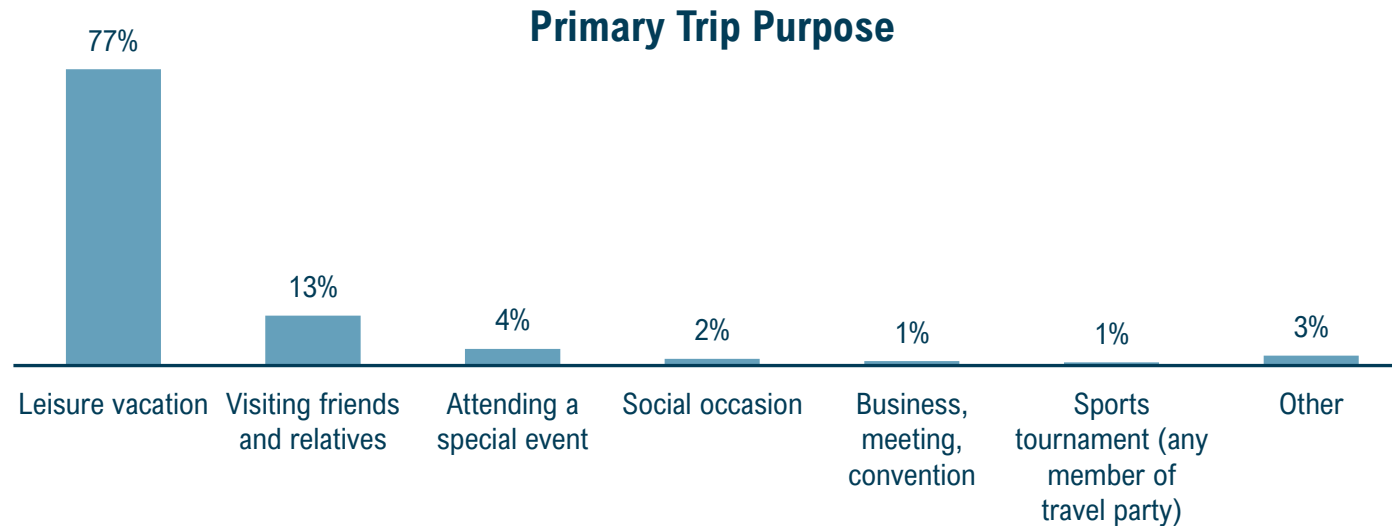


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Trip Purpose

Leisure trips to Blowing Rock are the most common type.

- 77% of trips to Blowing Rock have been leisure getaways. Consumers on leisure getaways are important to the destination because they stay longer and in paid accommodations (77%) when compared to other trip types.

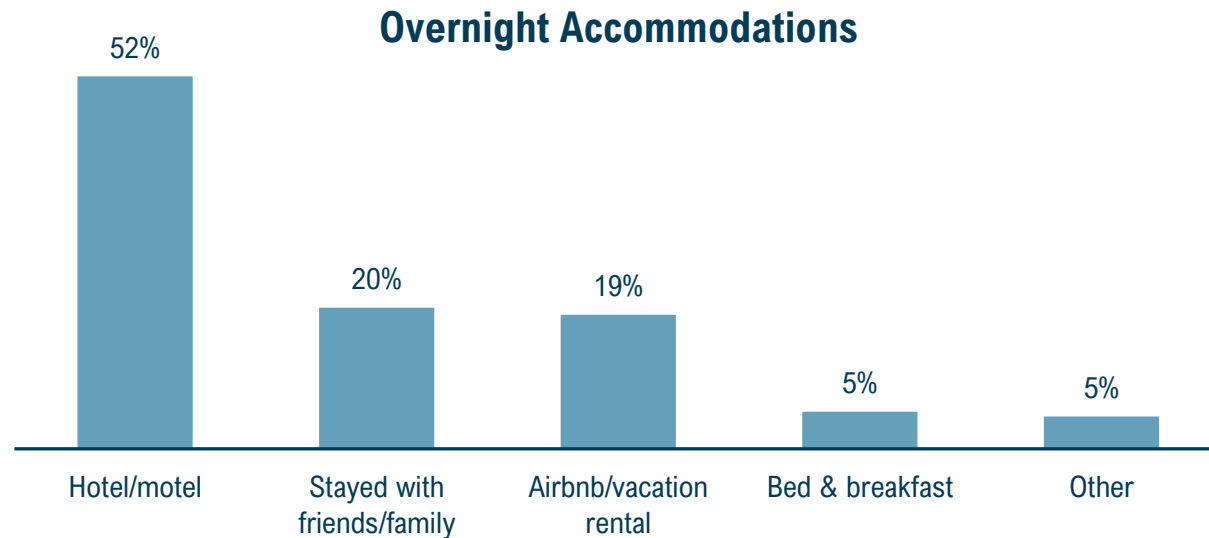


	Other (VFR, Business, Sports, etc.)	Leisure
Frequency (Trips to Blowing Rock since 2019)	3.5	2.0
Trip Length for trip including stop in Blowing Rock	3.3	3.9
Trip Nights <i>in</i> Blowing Rock	2.9	3.8
Trips with children	33%	30%
Stayed in paid accommodations (all trips)	34%	77%

Trip Length and Accommodations

Half of overnights stay in hotels for an average of 3.6 nights.

- 94% of overnight visitors stay in accommodations in market when visiting Blowing Rock.



Blowing Rock Trips	
Average Number Trips since 2019	2.4
Average Trip Duration (Nights)	3.6
Percentage of Daytrips	16%
Percentage of nights in Blowing Rock for all overnight trips*	94%
Average Travel Party Size	3.0
Trips with Children	30%

*The percentage of all consumers who visited as part of an overnight trip that knowingly used lodging in destination.

Trip Experience

95% of consumers to Blowing Rock report having a positive trip experience.



Demographics

Visitors to Blowing Rock are more likely to be married and less diverse than the control group of travelers.

- Two-thirds of visitors to Blowing Rock are married, and a third have children in the home. These consumers are also more likely to be Millennials (35%), college grads (64%), and less ethnically diverse.

		Recent Blowing Rock Visitors	Target Market Travelers
Generation	Gen Z (18-26)	9%	10%
	Millennials (27-42)	35%	30%
	Gen X (43-58)	23%	24%
	Boomers (59-77)	30%	33%
	Silent (78+)	3%	3%
Marital Status	Married / Partner relationship	66%	56%
	Single/never married	21%	27%
Children in the Household		34%	28%
College Grad+		64%	57%
Income	< \$100k	71%	74%
	\$100k to \$200k	25%	22%
	\$200k+	4%	4%
Employment	Less than full-time	29%	32%
	Full-time	47%	42%
	Retired	24%	26%
Ethnicity	African-American/Black	9%	14%
	Asian	3%	5%
	Caucasian/White	87%	79%
	Hispanic/Latino	4%	6%
Gender	Female	63%	67%
	Male	36%	32%
LGBTQ+		7%	8%

Appendix



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Questionnaire

North Carolina Co-op 2023 Brand and Image Position Study Questionnaire June 2023

COMPETITIVE SET – PAYING PARTNERS – 600 familiars (as possible – it's okay to fall short but get at least 400)

Blowing Rock, NC
Crystal Coast, NC: Includes Emerald Isle, Indian Beach, Pine Knoll Shores, Atlantic Beach and the cities of Morehead City, Beaufort and Newport
Durham, NC
Pinehurst/Moore County, NC
Dunn/Harnett County, NC: Located southwest of Raleigh, includes the city of Dunn which is conveniently located off of I-95 and is the halfway mark between New York City & Florida
Goldsboro/Wayne County, NC: Located southeast of Raleigh, includes the city of Goldsboro and Mt. Olive
COMPETITIVE SET – JUST FOR COMPARISON – 200 Familiars (as possible – it's ok if they fall short, this list is for comparison)
Highlands, NC
Smithfield/Johnston County, NC: Located just southeast of Raleigh on the I-95 corridor
Kiawah Island, SC
Raleigh, NC
Outer Banks, NC: includes Manteo, Nags Head, Hatteras, Duck, Kill Devil Hills, Kitty Hawk and Rodanthe

Use the destination names that are shown here in bold throughout the survey. Use the longer text in the IMAGEINTRO.

MARKETS	QUOTA
North Carolina	500
Mid-Atlantic: Virginia, DC, MD, West Virginia, New York City, Philadelphia	500
South: South Carolina, Kentucky, Tennessee, Georgia, Florida	500
Midwest: Ohio, Indiana, Michigan, Illinois	500
Total	2,000

REBALANCE SAMPLE BASED ON FAMILIARITY TO QUOTA 600 PER DESTINATION
SOMEWHAT FAMILIAR +

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zip. What is your ZIP code? _____

decision. Who in your household is responsible for making decisions concerning travel destinations?

- Me
- Me and my spouse/partner
- My spouse/partner [TERMINATE AFTER ALL SCREENING QUESTIONS ASKED]

newtravel. Please indicate which of the following describe you...

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter, Instagram, or TikTok		
I regularly engage in some form of physical exercise like walking, biking, or participating in sports to help stay healthy		
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, HBO Max, or Hulu		
I am currently planning or have already planned an upcoming leisure trip		[TERMINATE AFTER SCREENING QUESTIONS IF NO TO BOTH TRAVEL SCREENERS]
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		

age. What is your age? _____ [IF < 18 TERMINATE AFTER ALL SCREENING QUESTIONS ASKED]

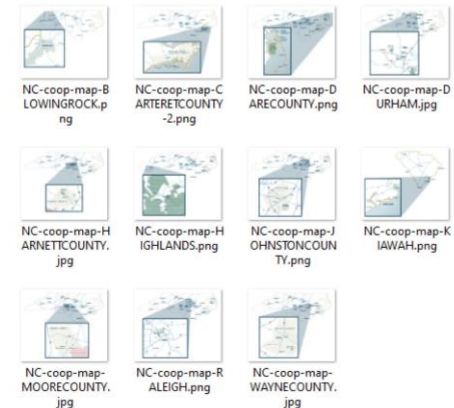
END OF SCREENING QUESTIONS

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IMAGE AND COMPETITIVE LANDSCAPE

IMAGEINTRO: The following questions are about places and their image as a leisure travel destination. Please view the map of each destination.

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CAROUSEL: SHOW INDIVIDUAL MAP OF EACH DESTINATION WITH A DESCRIPTION OF EACH AND NEXT BUTTON. FORCE 2 SECONDS ON EACH.

11. How familiar are you with each of the following destinations and what they have to offer as a place to visit for a leisure trip?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
[INSERT COMPETITIVE SET]	1	2	3	4

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Questionnaire

12. Which of the following destinations have you visited for a leisure trip?

[ROTATE]	Visited in Past 2 years	Visited 2 - 5 years ago	Visited more than 5 years ago	Never visited
[INSERT COMPETITIVE SET]				

13. How would you rate each of these destinations as a place to visit for a leisure trip?

In some cases, you may not be very familiar with the destination, but please rate it based upon whatever you know or have heard.

[ROTATE]	Poor	Fair	Good	Excellent
[INSERT COMPETITIVE SET]	1	2	3	4

14. How likely are you to visit each of the following destinations for a leisure trip in the next 12 months?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
[INSERT COMPETITIVE SET]	1	2	3	4	5

ASK 15 - 16 FOR THREE DESTINATIONS THAT ARE AT LEAST SOMEWHAT FAMILIAR. QUOTA 600 EACH DESTINATION.

15. How much do you agree that [DESTINATION] is or has...?

[ROTATE]	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
	1	2	3	4	5
Great place to be inspired					
Unpretentious and real					
Awe-inspiring sites					
Excitement and adventure					
Good value					
Iconic landmarks					
Rich history					
Nightlife					
Off the beaten path					
A place I would be excited to visit on for a leisure trip					

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[ROTATE]	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
Historical sites and museums					
Active outdoor recreation					
Cultural attractions					
Beautiful scenery					
Great beaches					
Mountain scenery					
Small towns and main streets					
Great food scene					
Parks and natural areas					
A place where I can reconnect					
A place where I can disconnect from the stresses of everyday life					
A lot to see and do					
Offers luxurious escapes					
Local, independent shops					
Outlet/mall shopping					
Wineries					
Good live music scene					
Coastal leisure activities					
Breweries					
Easily accessible					

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16. The following words can be used to describe the "personality" of different leisure travel destinations. Please rate how much you agree that each word describes [DESTINATION].

[ROTATE]	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
Vibrant	1	2	3	4	5
Romantic					
Artsy					
Relaxed					
Welcoming					
Southern					
Modern					
Traditional					
Authentic					
Luxurious					
Serene					
Extraordinary					
Progressive					
Adventurous					
Friendly					
Safe					
Charming					

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Questionnaire

SEGMENTATION

This section is about leisure travel and your leisure trips. For the purposes of your responses, please consider trips that are for your personal leisure – vacations, getaways, trips for events, etc.

SEG1. Thinking about how you plan for leisure travel, how well do each of these describe your planning approach?

ROTATE	1 Not at all like me	2 Not much like me	3 Somewhat like me	4 Just like me
I rely on planned itineraries				
Package deals help me select a destination				
I travel to locations friends or family members have been before				
I create detailed plans and fill every moment				
I don't like to plan too much – the goal is to relax				
I play it by ear and let the plan develop naturally				
I look for destinations that are new for me				
I wait until the last minute				
I like to discover my way through a destination				
I try to find destinations off the beaten path.				

SEG2. Thinking about how you travel for leisure, how well do each of these describe your attitude?

ROTATE	1 Not at all like me	2 Not much like me	3 Somewhat like me	4 Just like me
I'd rather enjoy simple pleasures over new adventures				
I need to feel disconnected from technology				
I need to spend quality time with my friends & family				

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ROTATE	1 Not at all like me	2 Not much like me	3 Somewhat like me	4 Just like me
I am willing to pay more for the experience I want				
I like learning about and experiencing different cultures				
I want my children to grow and create memories				
I like to be pampered while traveling				
I like to do as little as possible on vacation				
I try to immerse with local residents and activities				
I want to be the first of my friends or family to visit a destination				
I prefer visiting places I have never been to				
I travel to the same destination every year				
I like to try new things – such as food or other experiences				

TRIPS – paying partners only

SELECT THREE DESTINATIONS WITH VISITATION IN PAST 5 YEARS. PRIORITIZE PLACES WITH LEAST NUMBER OF VISITORS

Now, we're going to ask you about some of the trips you have taken.

T1. You mentioned you have visited [DESTINATION] within the past 5 years. How many leisure trips have you taken to [DESTINATION] since 2019? ____

For the following questions, please think about your most recent trip to [DESTINATION]

T2a. Overall, how would you rate your trip experience?

- Excellent
- Good
- Fair
- Poor
- Very poor

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T3. What was the primary purpose of your trip to [DESTINATION]?

- Leisure vacation/getaway
- Visiting friends and relatives
- Attending a special event/concert/spectator sports
- Participating in a sports tournament (any member of travel party)
- Social occasion like a wedding/graduation/anniversary
- Business/meeting/convention
- Other, specify _____

T3. Did you...?

- Use paid accommodations [ASK T3a]
- Stay with friends and/or family
- Did not stay overnight [SKIP TO T5]

T3a. Did you stay in...?

- Hotel/motel
- Bed & breakfast
- Airbnb/vacation rental
- Other, specify _____

T4. In total, how many nights were you away from home on this trip? ____

T4a. How many *nights* did you spend in [DESTINATION] on this trip? ____

T5. Including you, how many people were on this trip? ____ [IF =1, SKIP TO T7]

T6. How many children under 18 years were part of your trip? ____

DEMOS

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

marital. Are you currently...?

- Married/Partner relationship
- Divorced/separated
- Widowed
- Single/never married

PPinHH. Including you, how many people are currently living in your household? ____
[IF 1, GO TO EDUCATION]

kids. How many living in your household are children younger than age 18? ____

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Questionnaire

education. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

income. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 but less than \$250,000
- \$250,000 or more

employ. Are you currently...?

- Employed full-time
- Employed part-time
- Self-employed/own your own business
- Unemployed
- Student
- Homemaker
- Retired

ethnicity. Which of the following best describes your racial or ethnic heritage? Are you...?

Select all that apply. [\[ALLOW MULTI\]](#)

- African-American/Black
- Asian
- American Indian or Alaska Native
- Caucasian/White
- Hispanic/Latino
- Native Hawaiian or Other Pacific Islander
- Other, please specify _____

gender. Do you identify as...?

- Male
- Female
- Non-binary/transgender/non-conforming
- Prefer not to answer

Orientation. Do you identify as LGBTQIA+?

- Yes
- No
- Prefer not to answer

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