



## ***Brand Perception Research***

*Completed November 2017*

# Project Overview

## **PURPOSE**

Provide decision makers with a benchmark that measures how travelers across the region view the destination's brand and provide insight into how it compares to destinations in its competitive set.

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## **TARGET AUDIENCE**

A professionally managed panel of travelers living within a 300-mile radius of Blowing Rock. Respondents were screened to ensure they were leisure travelers and household decision makers regarding travel. In addition, an oversample of 200 affluent travelers who earn more than \$150k was collected.

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## **SAMPLE**

A total of 800 travelers were surveyed, providing a maximum margin of error of +/-3.5% at a 95% confidence interval. Overall, 365 respondents earn \$150k or more while 435 earn less than \$150k.



## Brand Penetration

- Unaided & Aided Awareness
- Consideration & Usage
- Market Potential



## Brand Equity

- Differentiators
- Intent to Visit
- Net Promoter Score



## Brand Loyalty

- First Consideration of Blowing Rock
- Market Buzz
- Changes in Perception



## Brand Personality

- Brand Descriptors
- Brand Attributes
- Brand Map



## Visitors, Travel Preferences & Non-Visitors

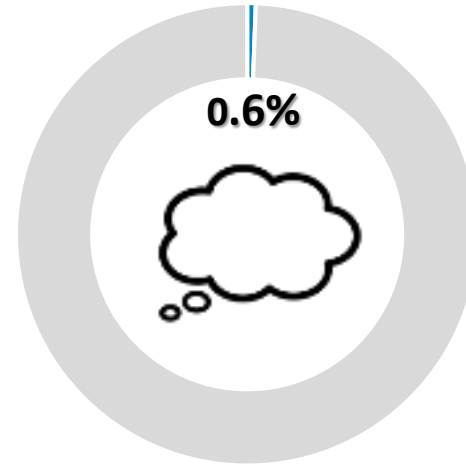
- Visitation
- How Heard About Area
- Primary Purpose of Visit
- Area Activity Participation
- Functional Drivers
- Visitor Profiles
- Stated vs. Derived Barriers
- Motivations for Future Visits



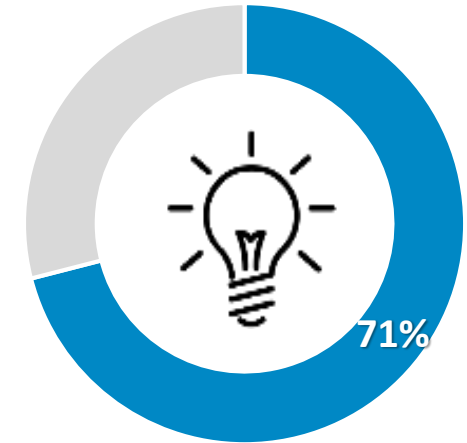
# Brand Penetration KPIs\*



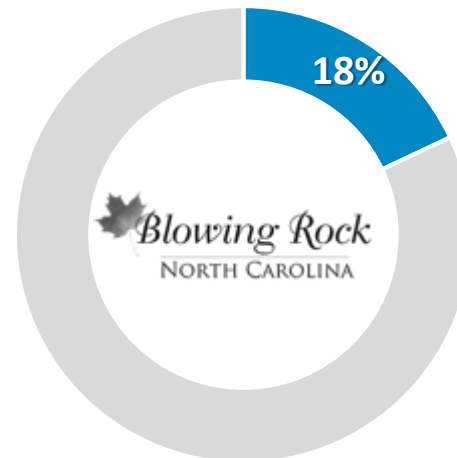
### Unaided Brand Awareness



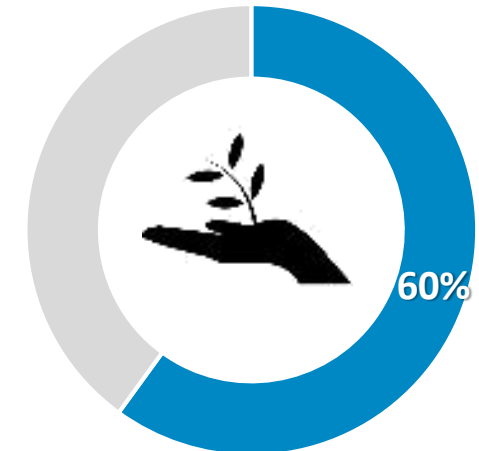
### Aided Brand Awareness



### Visitation in Past 2 Years



### Market Potential

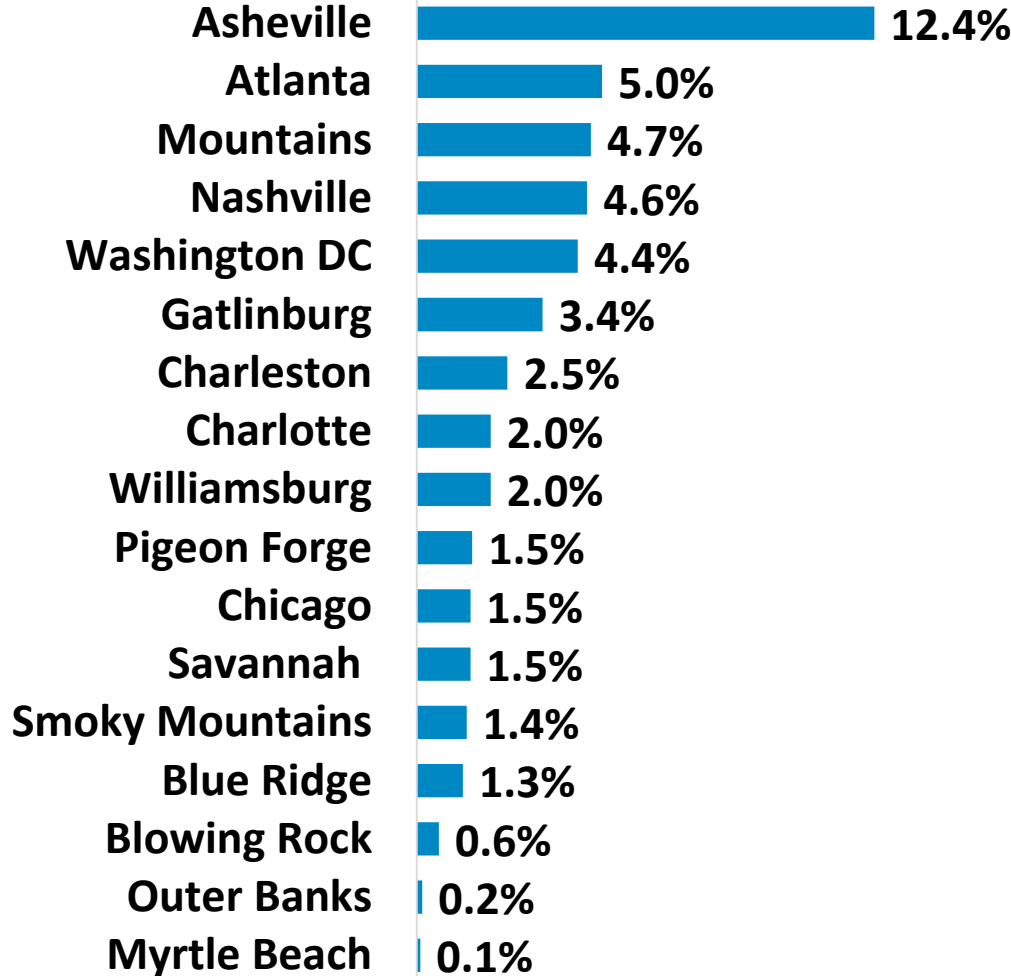


\*Key Performance Indicators

# Blowing Rock’s unaided awareness is low, but most destinations have unaided awareness of less than 5%.



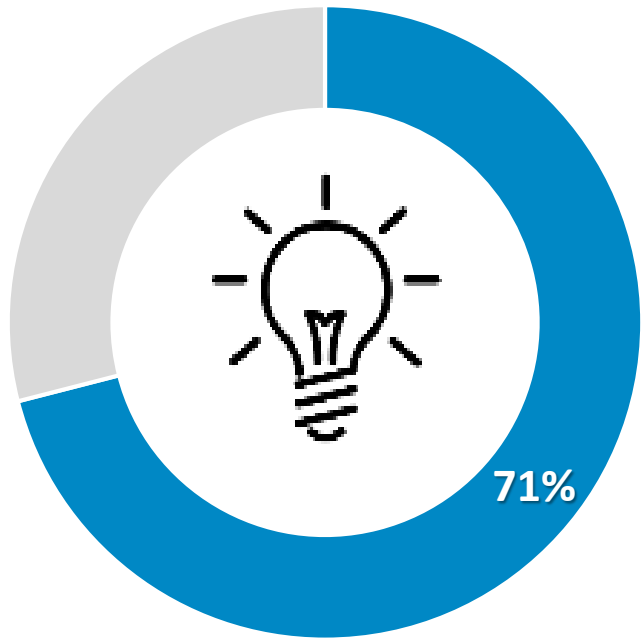
## Top of Mind Destinations - Any Mention



Q8: When you think of overnight or weekend getaways, that are not beach or coastal destinations and are within driving distance of your home, which destinations first come to mind?

# 7 in 10 travelers are familiar with Blowing Rock as a leisure destination. But, relative to a specific comp set, aided brand awareness is lower.

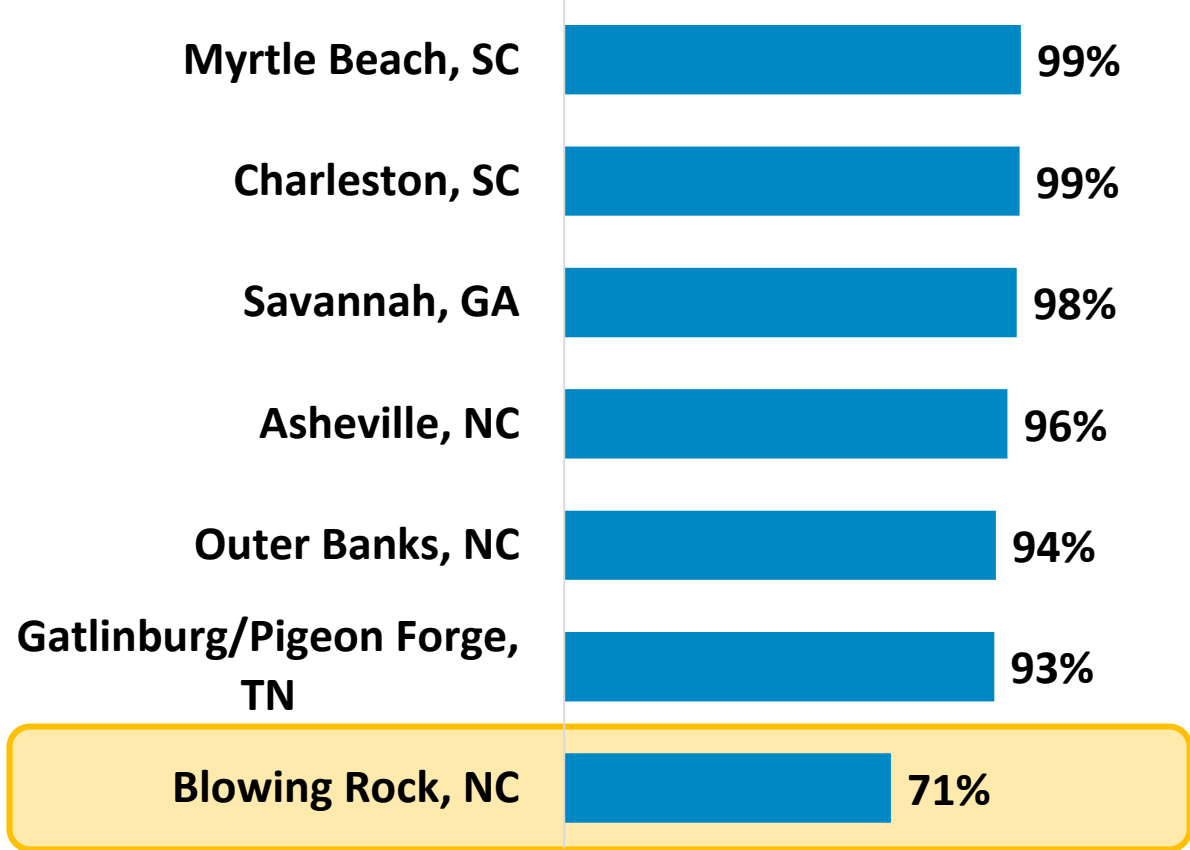
### Blowing Rock Aided Brand Awareness



79% of affluent travelers are aware of Blowing Rock

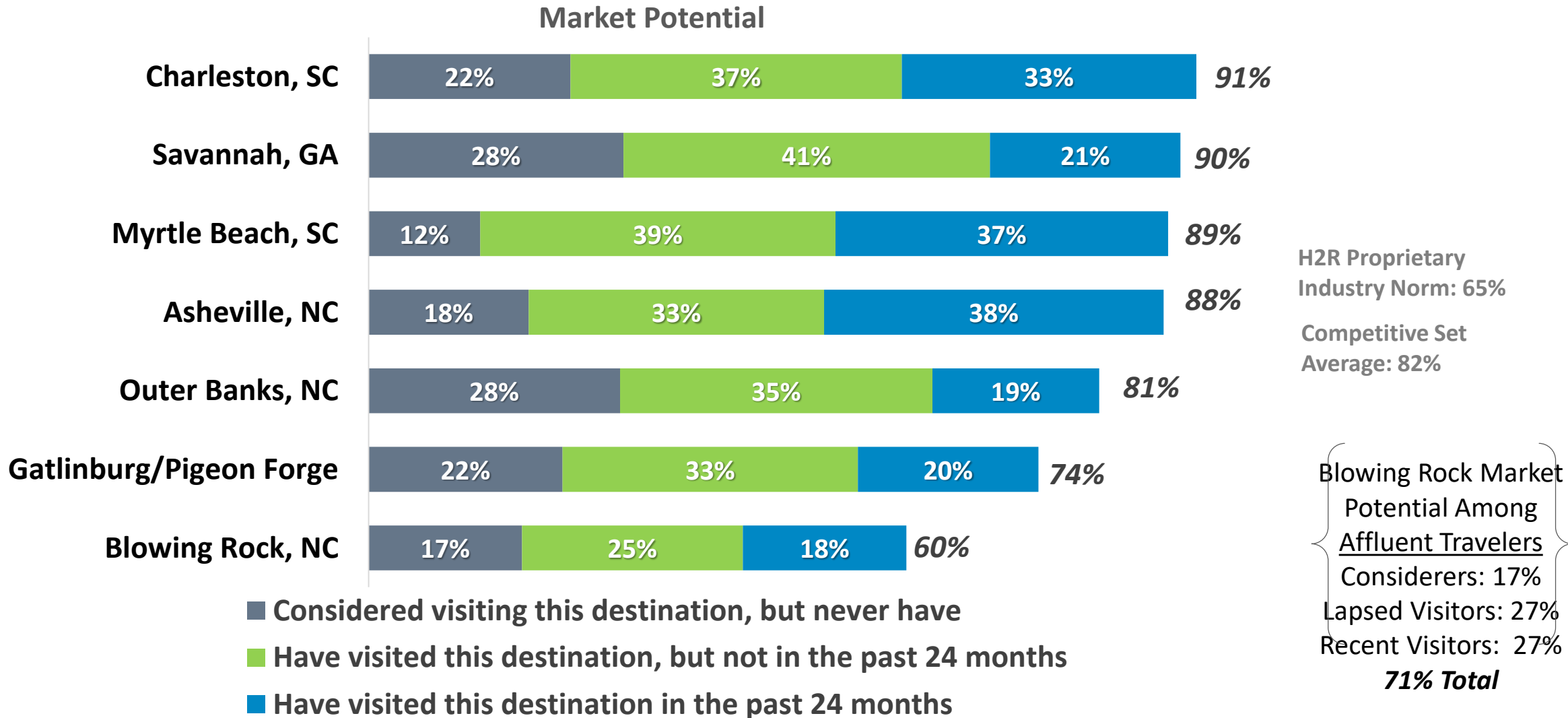
Q9: Please indicate your awareness and prior visitation of the following destinations.

### Aided Awareness of Destinations



H2R Proprietary Industry Norm: 86%  
Competitive Set Average: 93%

# Market potential for Blowing Rock is lower than the competitive set—largely attributable to lower market share from recent visitors.



# Blowing Rock's market potential translates into approximately 7.6 million traveler households (and/or 3.2M affluent travel households).


## Market Potential Households




*Market Potential Households Among Affluent Travelers*

 **16.2M Traveler Households within 300 miles**

**4.5M**

 **0.8M Households Visited Blowing Rock In the Past 24 Months**

**1.2M**

 **4.0M Households Visited Blowing Rock More than 24 Months Ago**

**1.2M**

 **2.8M Households Considered Visiting Blowing Rock**

**0.8M**

**3.2M Total Market Potential Among Affluent Travelers**

 = 1M Traveler Households

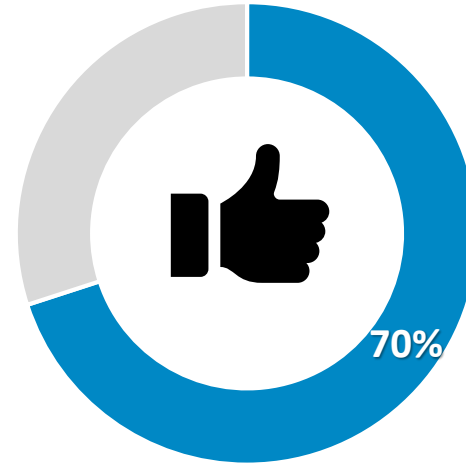
Q9: Please indicate your awareness and prior visitation of the following destinations:



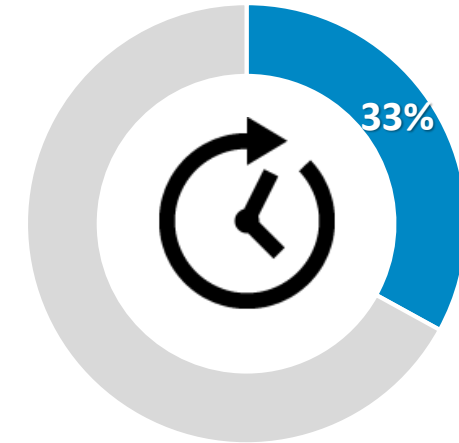
# Brand Equity KPIs



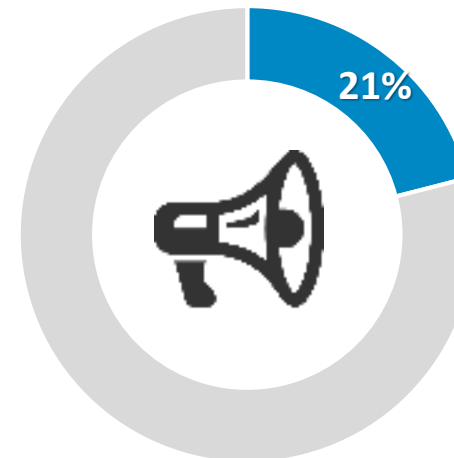
Positive Opinion



Intent to Visit

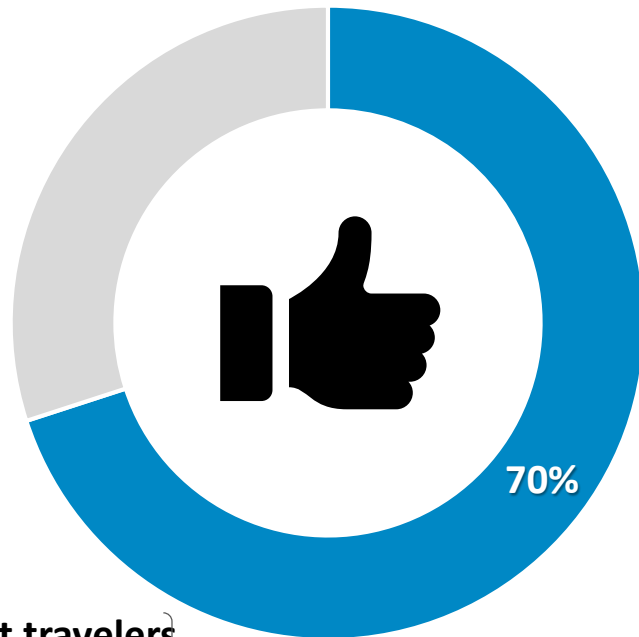


Net Promoter Score



# Travelers have a positive opinion of Blowing Rock—on par with the competitive set average and significantly higher than H2R’s Norm.

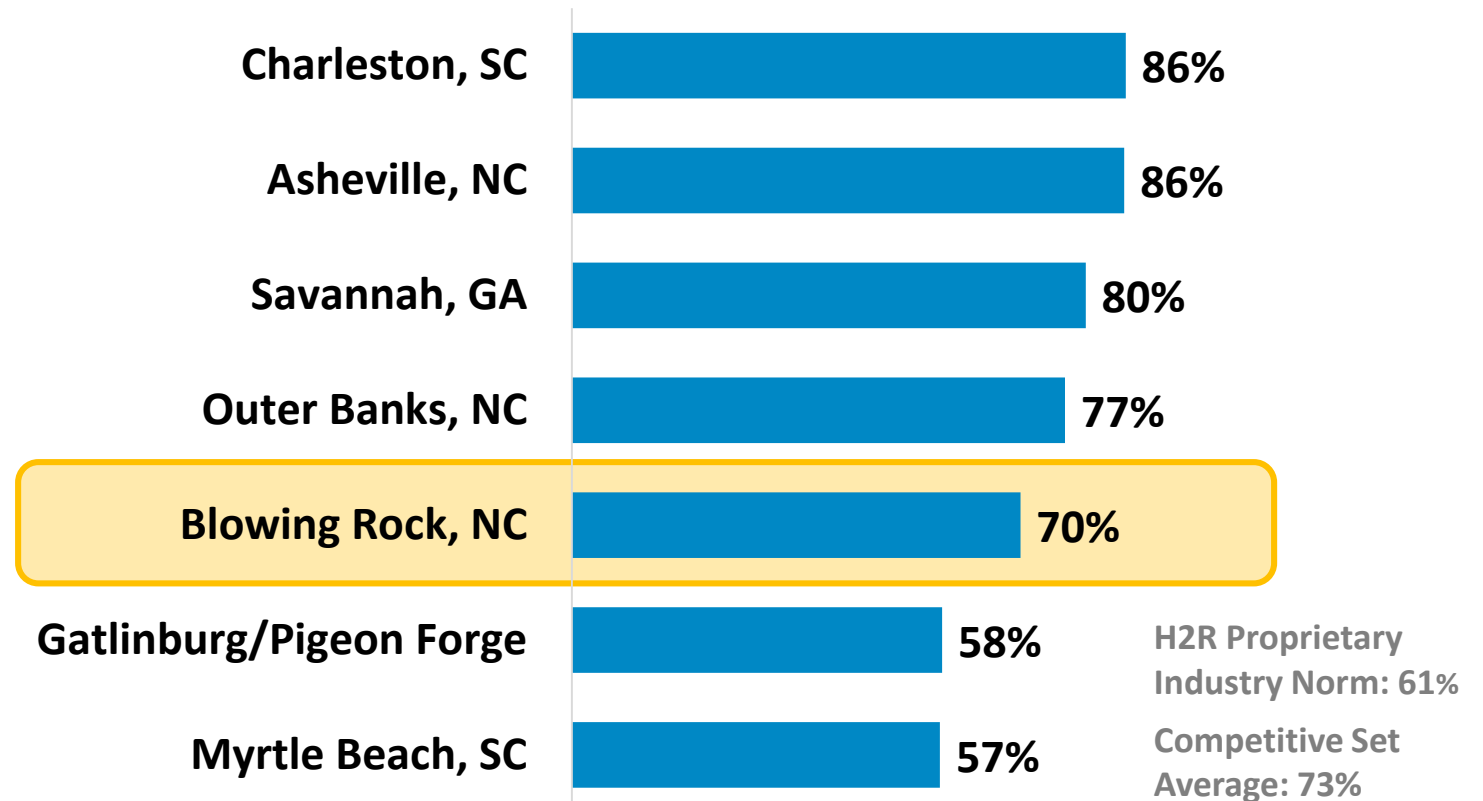
## Positive Opinion of Blowing Rock



78% of affluent travelers have a positive opinion of Blowing Rock

Q10: Please indicate to what degree your opinion of these destinations is positive or negative.

## Positive Opinion of Destinations



# Every destination distinguishes itself in different ways. Blowing Rock is most differentiated by its Outdoor Adventure offerings.

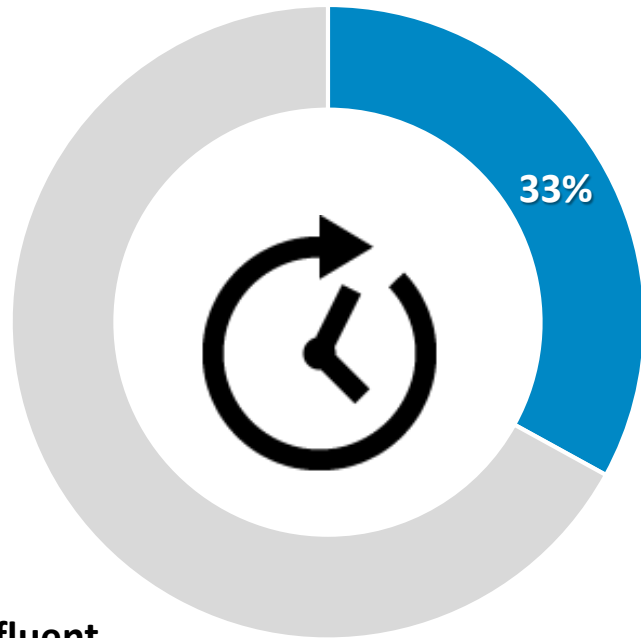
	Unique	Outdoor Adventure	Relaxing	Easily Accessible	Family-Friendly
Asheville, NC	55%	48%	59%	52%	43%
<b>Blowing Rock, NC</b>	<b>38%</b>	<b>62%</b>	<b>48%</b>	<b>36%</b>	<b>42%</b>
Charleston, SC	59%	19%	54%	54%	47%
Gatlinburg/Pigeon Forge, TN	33%	47%	33%	35%	67%
Myrtle Beach, SC	13%	32%	47%	49%	65%
Outer Banks, NC	35%	50%	69%	28%	56%
Savannah, GA	55%	16%	53%	47%	43%

Q11: We would like to know whether or not you associate the following characteristics with each destination listed. Please move horizontally across the columns and consider the destinations one at a time.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH DESTINATIONS | N=VARIES BY DESTINATION

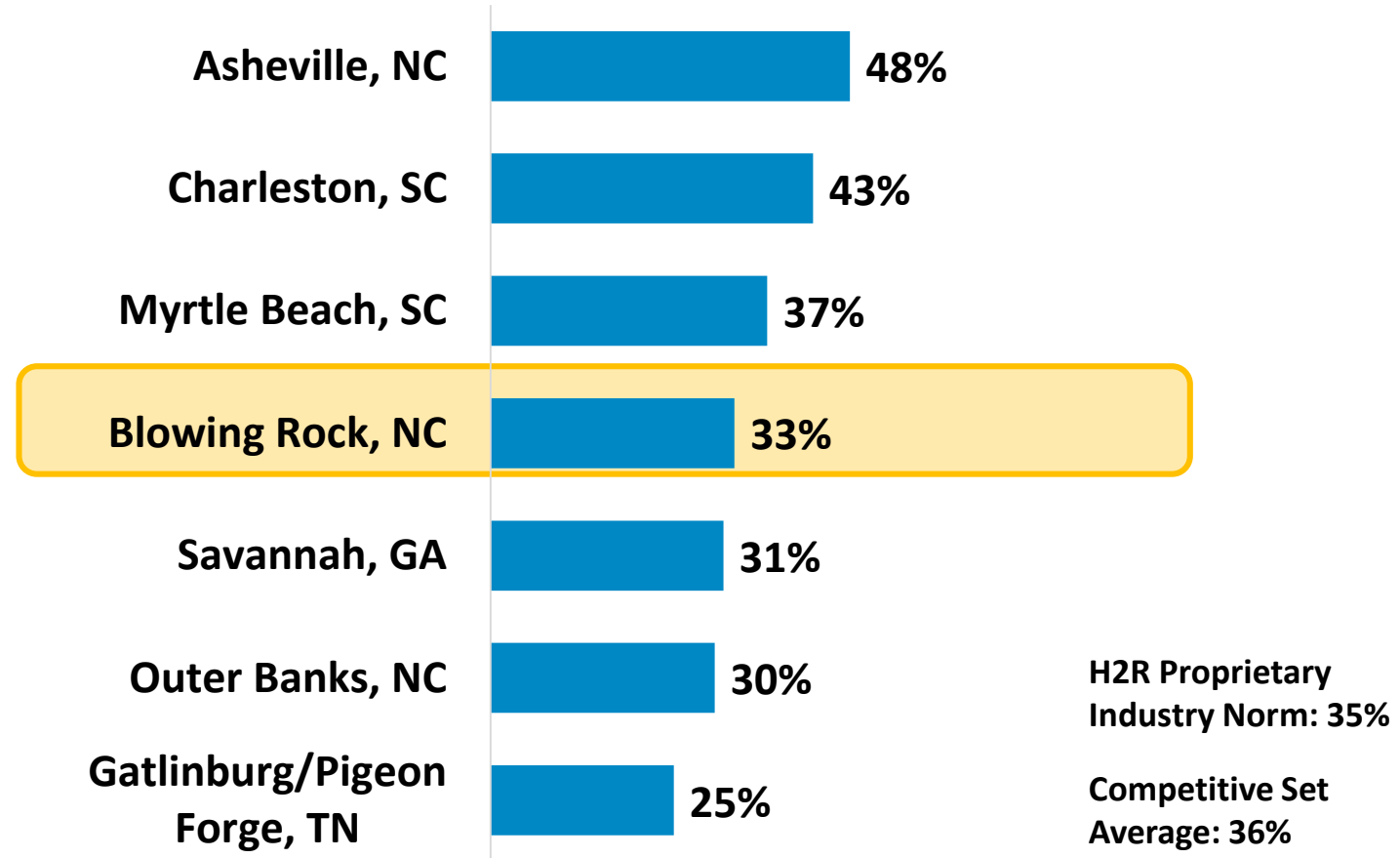
# Intent to visit Blowing Rock is relatively strong, ranking fourth among the competitive set and on par with the H2R industry norm.

## Intent to Visit Blowing Rock



36% of affluent travelers intend to visit Blowing Rock

## Intent to Visit Destinations



Q12: Please indicate how likely you are to visit each of the following destinations in the next 12 months.

RESPONDENT BASE: RESPONDENTS FAMILIAR WITH DESTINATIONS | N=VARIES BY DESTINATION

# Net Promoter Score

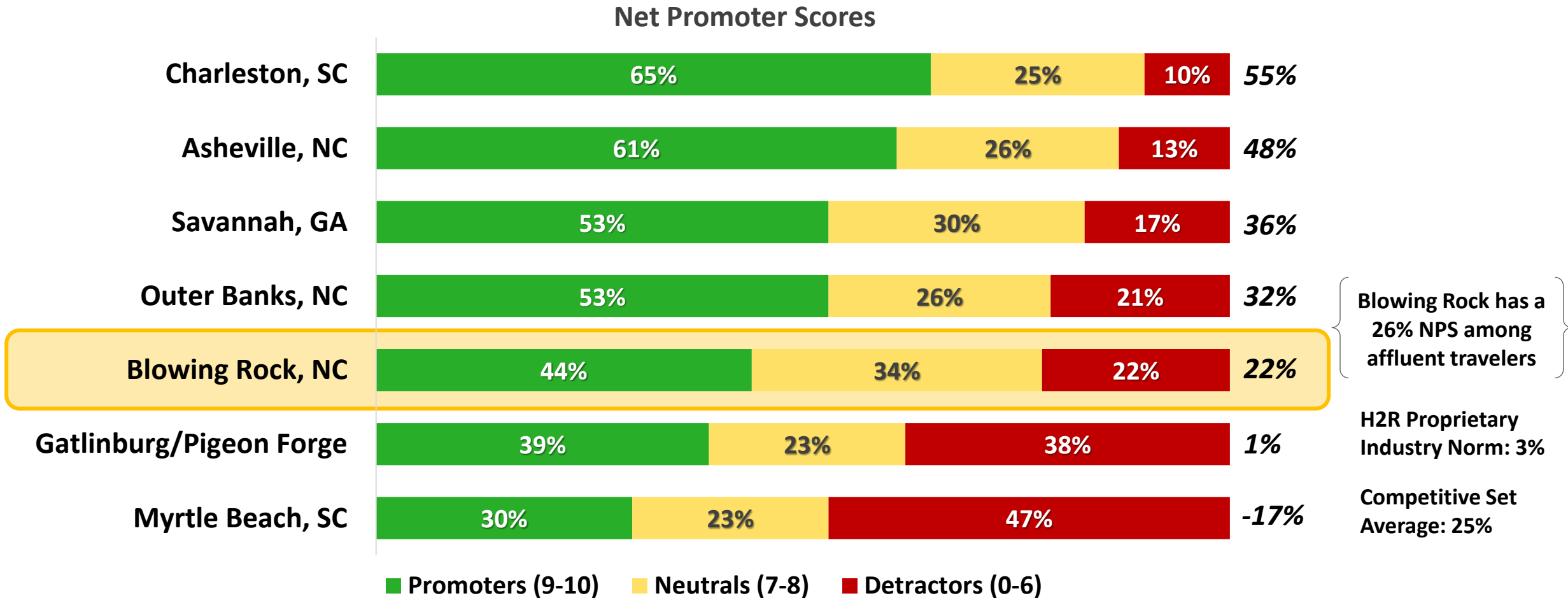
Net Promoter Score (NPS) is a measurement tool used across industries to evaluate net consumer satisfaction using a single point of accountability. Given the importance of social media and positive word of mouth advertising, it is mission critical that brands monitor their level of brand advocacy and the NPS is considered one of the best tools for doing so.

“How likely would you be to recommend visiting each of the following destinations to your friends and family?”



$$\text{Net Promoter Score} = (\% \text{ Who are Promoters}) - (\% \text{ Who are Detractors})$$

# Blowing Rock has a solid Net Promoter Score, significantly higher than the H2R industry norm.



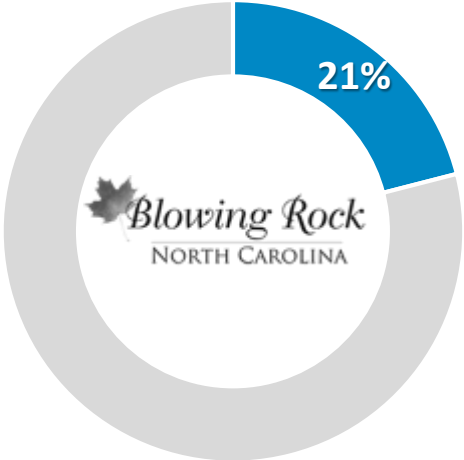
Q13: How likely would you be to recommend visiting each of the following destinations to your friends and family?

RESPONDENT BASE: RESPONDENTS WHO VISITED DESTINATIONS (EVER) | N=VARIES BY DESTINATION

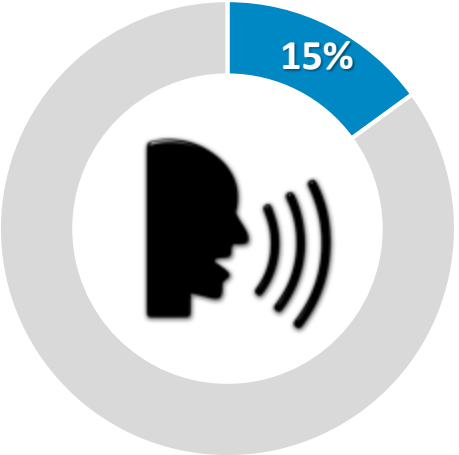
# Brand Loyalty KPIs



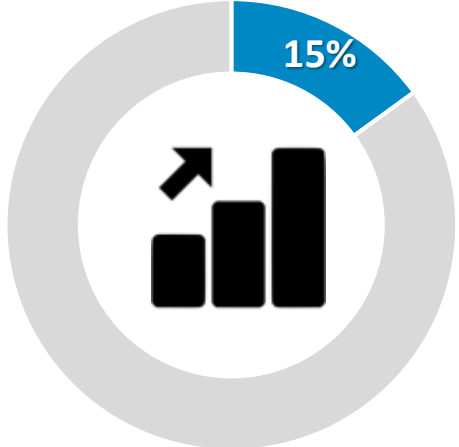
Consider Blowing Rock First



Market Buzz

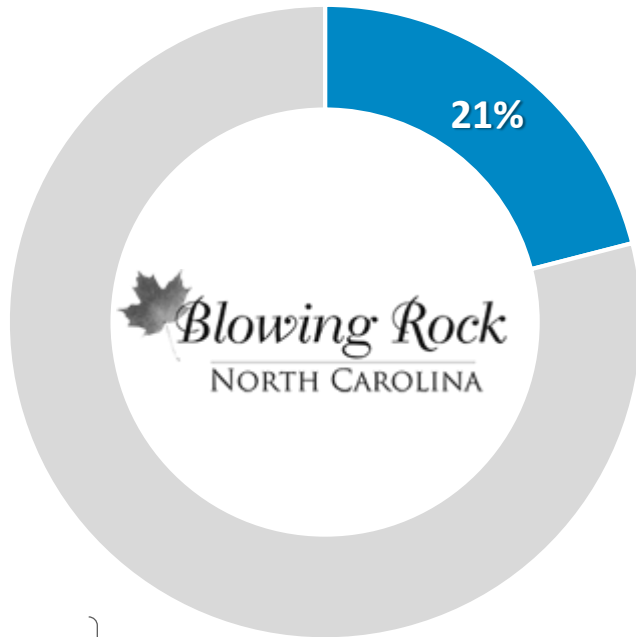


Positive Change in Opinion



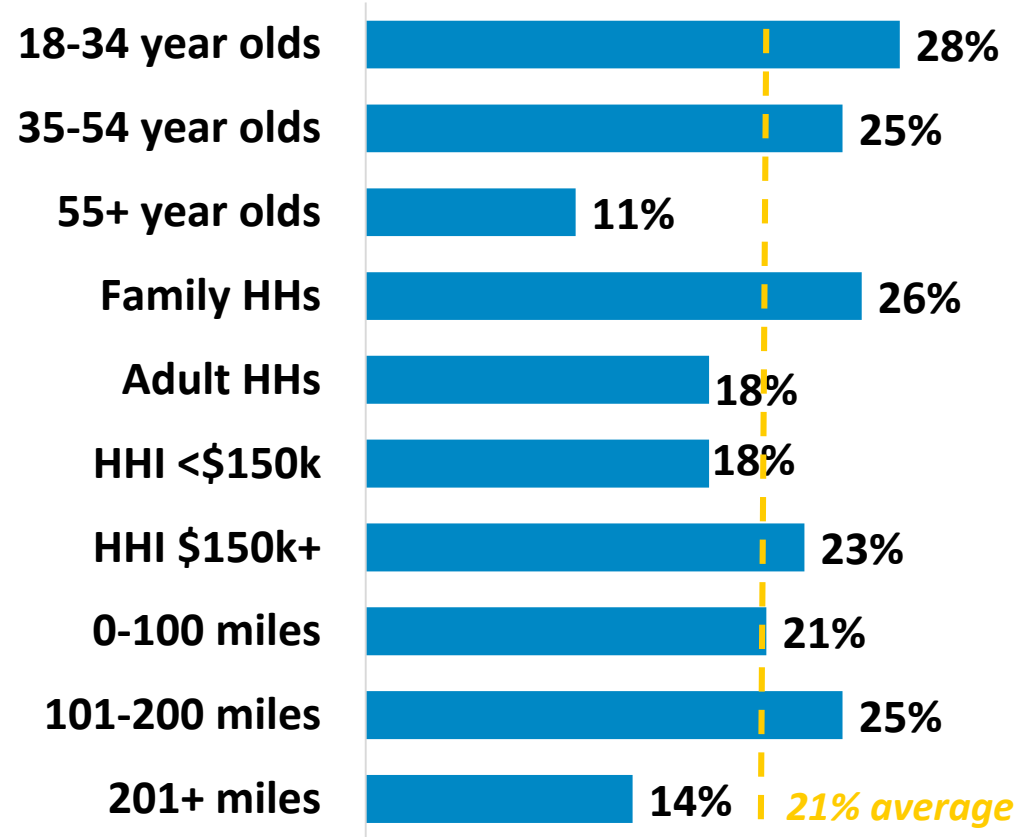
# One-fifth of travelers would consider Blowing Rock first when planning their leisure travel. Families and those 18-34 years old are most likely to consider visiting the area first.

**% Probably/Definitely Would Consider Visiting Blowing Rock First**



{ 23% of affluent travelers would consider Blowing Rock first }

**% Probably/Definitely Would Consider Visiting Blowing Rock First**

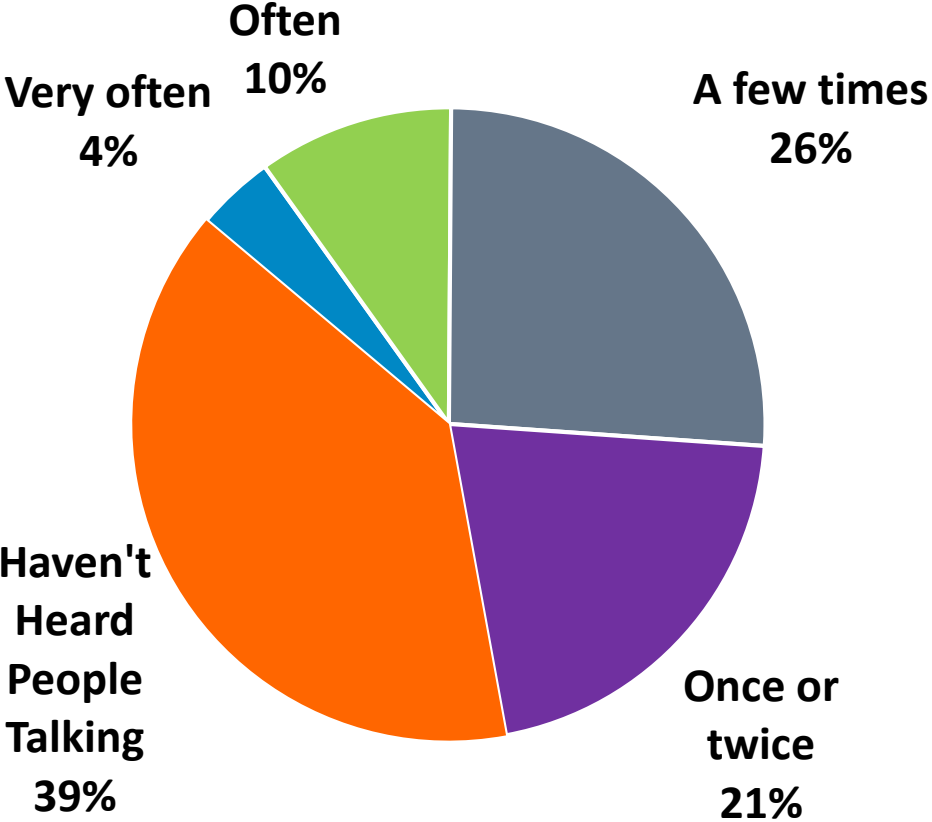


Q14: When considering visiting destinations, how likely would you be to consider visiting Blowing Rock, NC first?

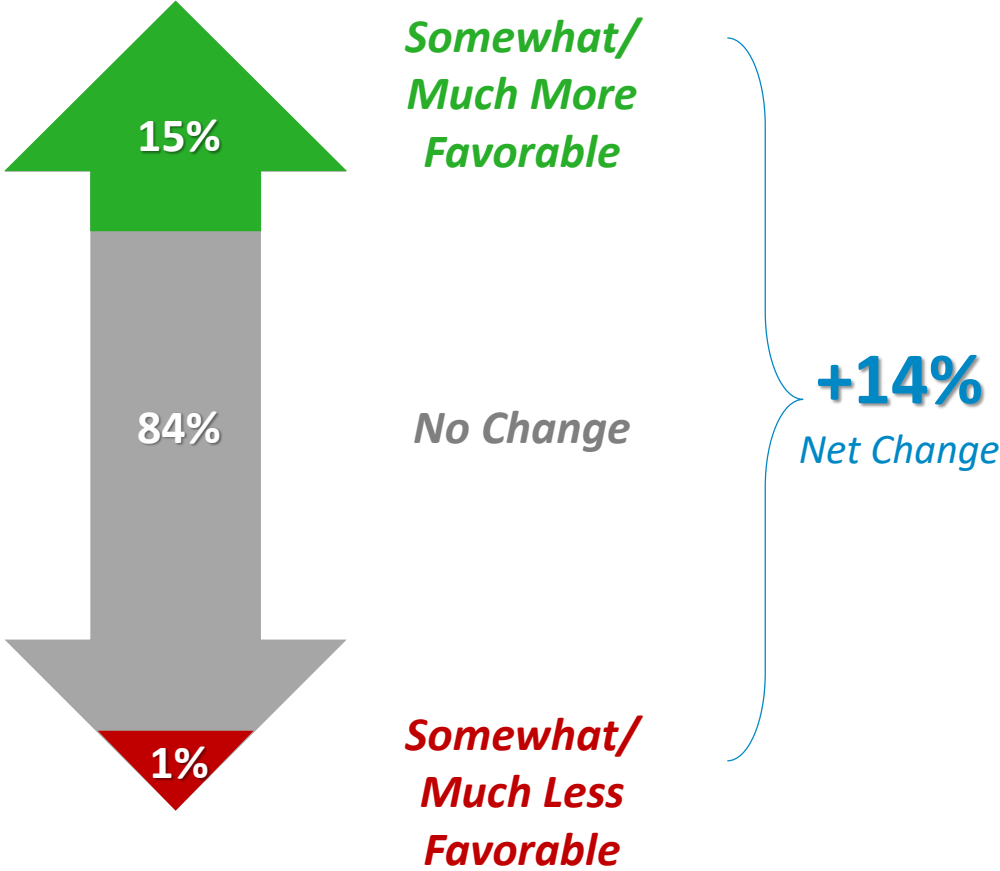


# More than half of travelers have heard people talking about Blowing Rock (61%). Over the past six months, their opinions have become more positive.

How Often Hear People Talk About Blowing Rock



Change in Perception of Blowing Rock Over Past Six Months



Q15: In the past 6 months, how often have you heard people talking about Blowing Rock, NC?  
Q16: How has your perception of Blowing Rock, NC changed in the past 6 months?

# Emotional drivers for Blowing Rock include spending time with friends and loved ones, and the chance to experience the great outdoors.

## % Somewhat/Very Important



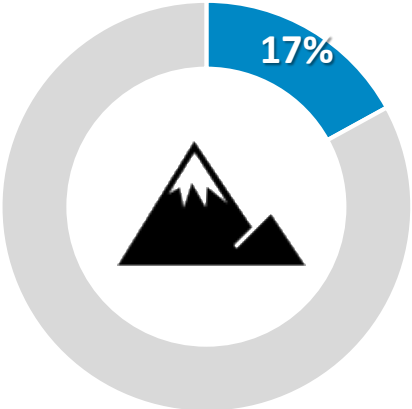
Q20: Please indicate how important the following issues were in motivating or inspiring you to visit Blowing Rock, NC.

RESPONDENT BASE: VISITED BLOWING ROCK (EVER) | N=341

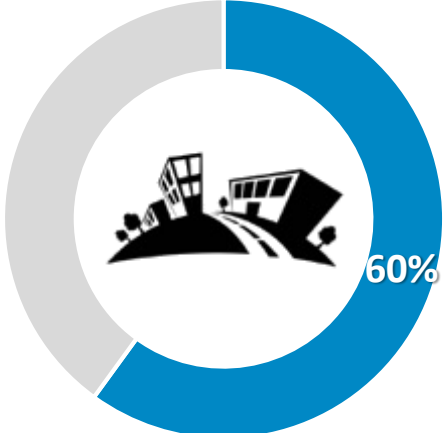
# Brand Personality KPIs



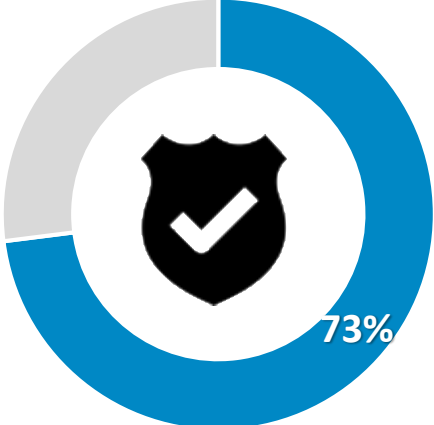
**Top Unaided Descriptor:  
Mountains**



**Top Aided Descriptor:  
Small Town**



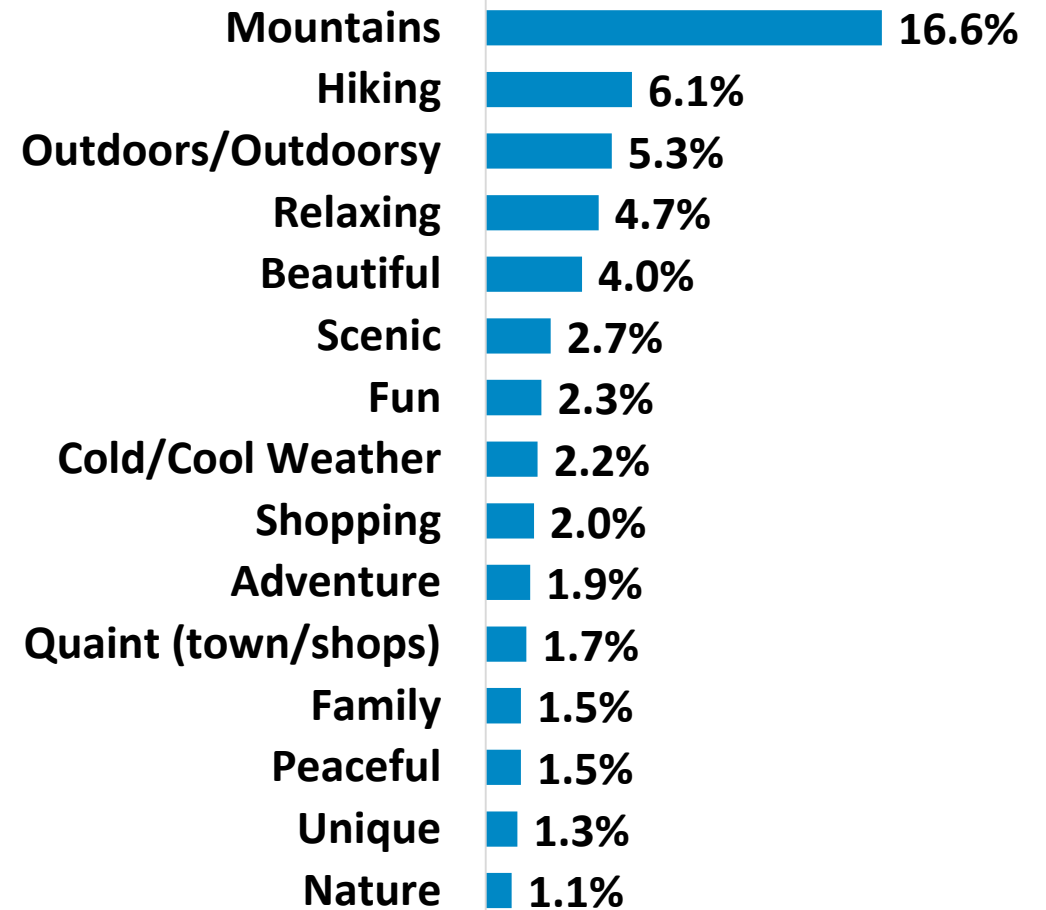
**Biggest Brand Strength:  
Safe, Worry-Free**



Blowing Rock is most well-known for mountains, hiking and the outdoors. This aligns with the area's top differentiator, Outdoor Adventure (62%).

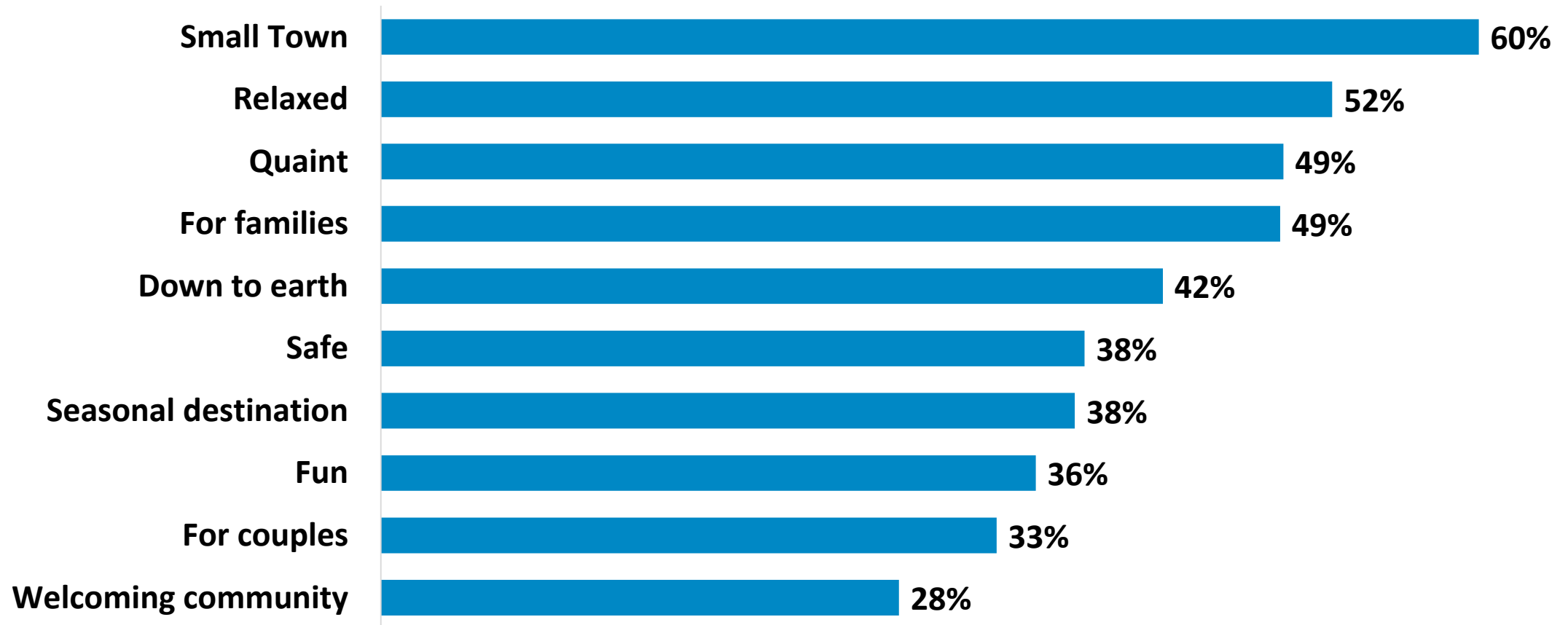


### Top of Mind Words to Describe Blowing Rock



The majority of travelers associate Blowing Rock with being a small town, followed by relaxed, quaint, and for families.

### Top 10 Characteristics of Blowing Rock

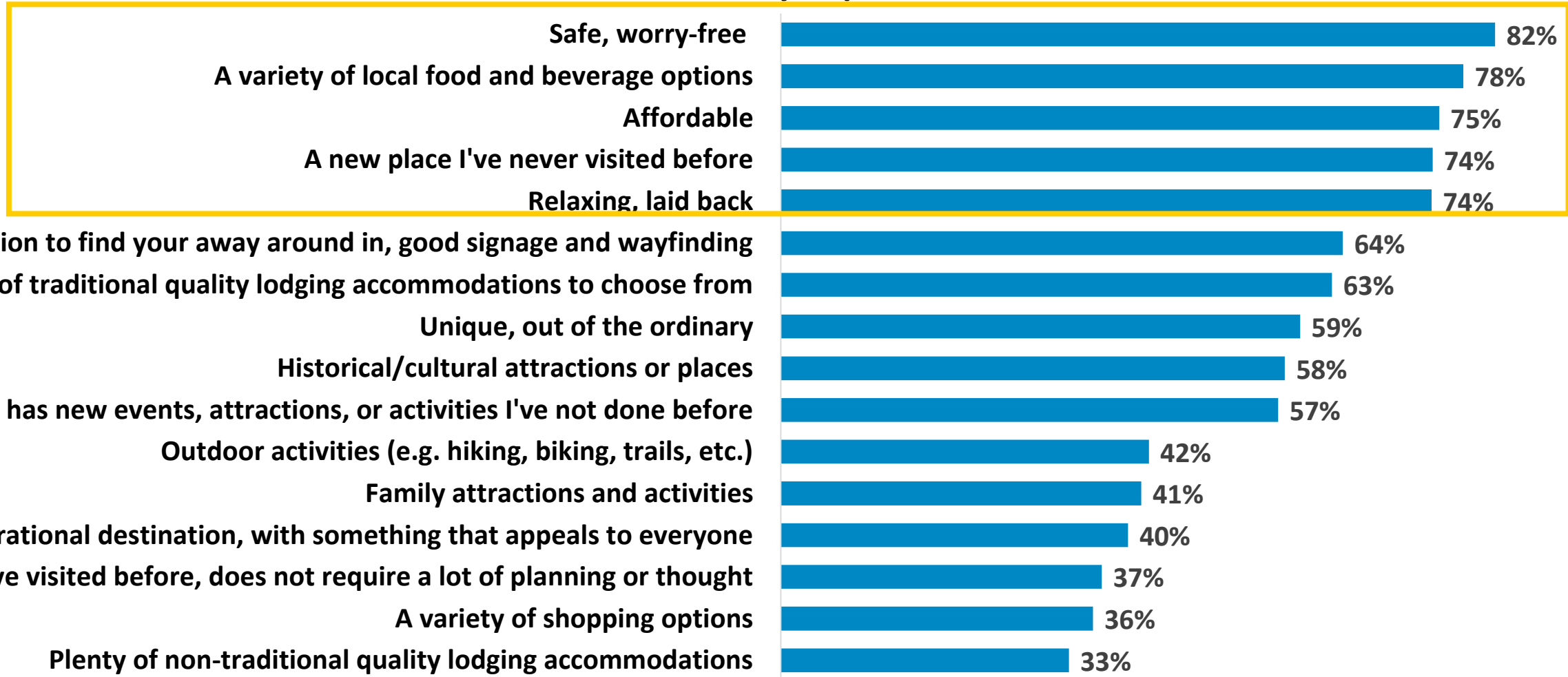


Q18: Which of the following traits best describe Blowing Rock, NC?

RESPONDENT BASE: FAMILIAR WITH BLOWING ROCK | N=566

***In general, travelers are searching for destinations that are affordable, have a variety of things to see and do and are easy to get around in.***

**% Somewhat/Very Important**

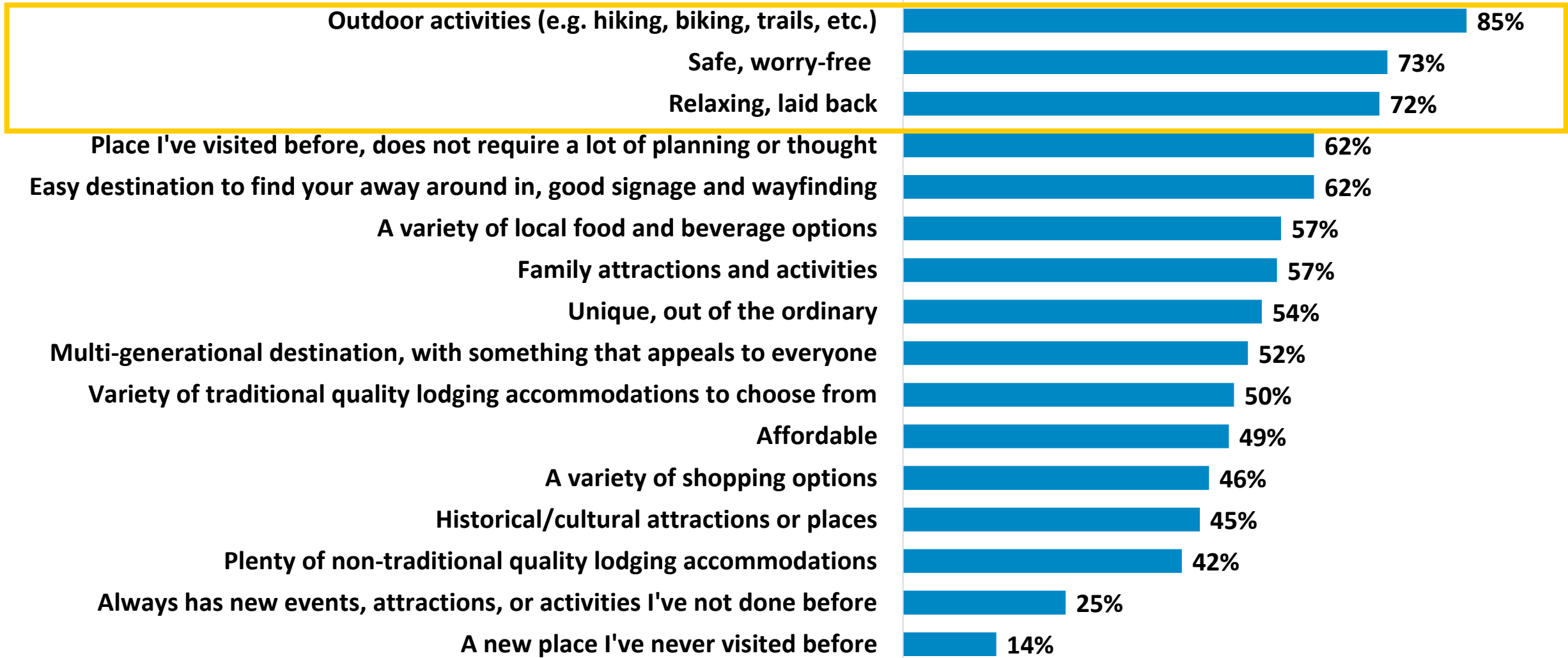


Q4: Please indicate how desirable you find each of the following attributes or characteristics when thinking about destinations you might consider visiting.

RESPONDENT BASE: ALL RESPONDENTS | N=800

# Blowing Rock visitors believe outdoor activities, safe/worry-free, and relaxing/laid back best describe the area.

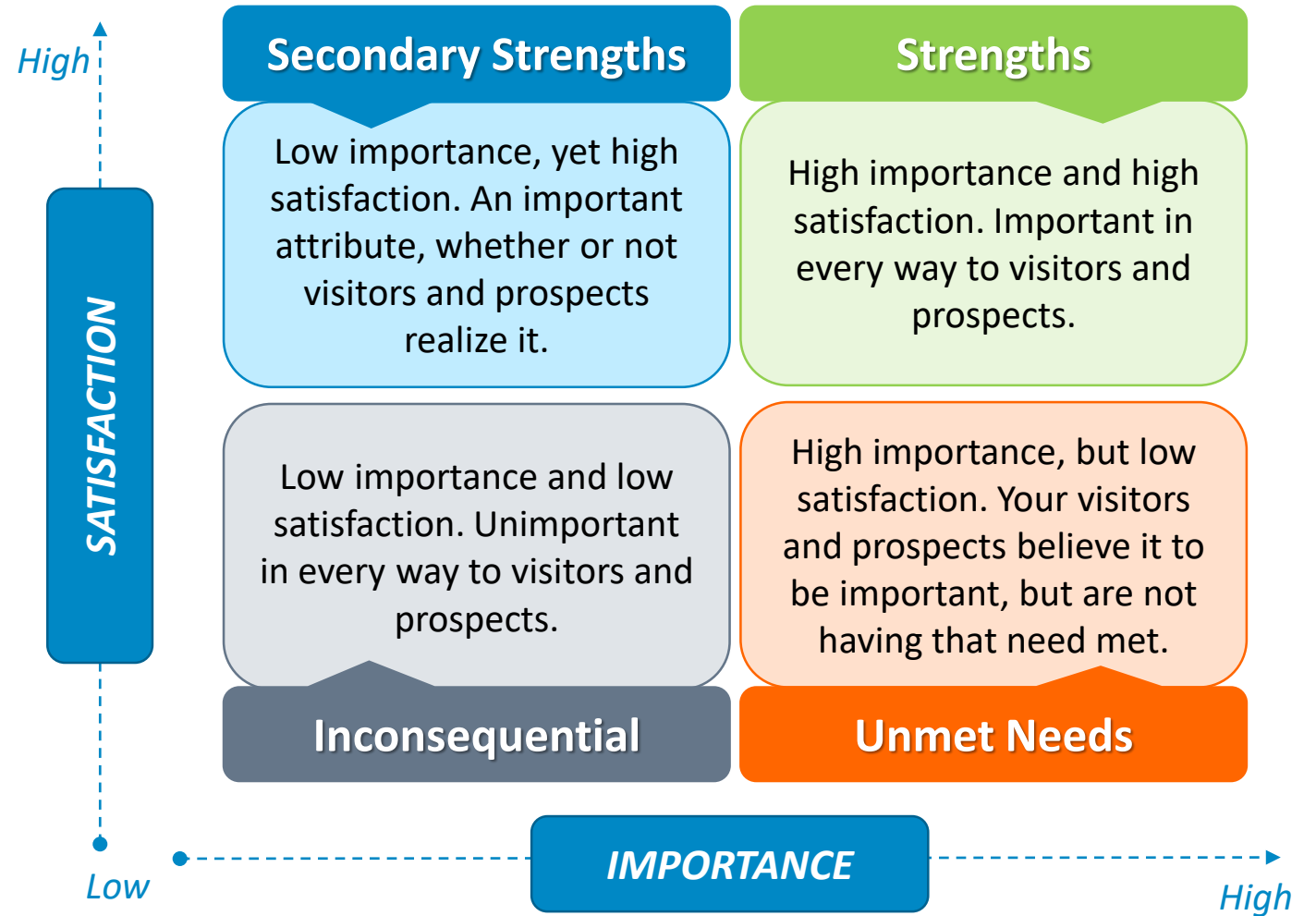
% Describes Perfectly/Very Well



# Identifying Brand Strengths and Unmet Needs

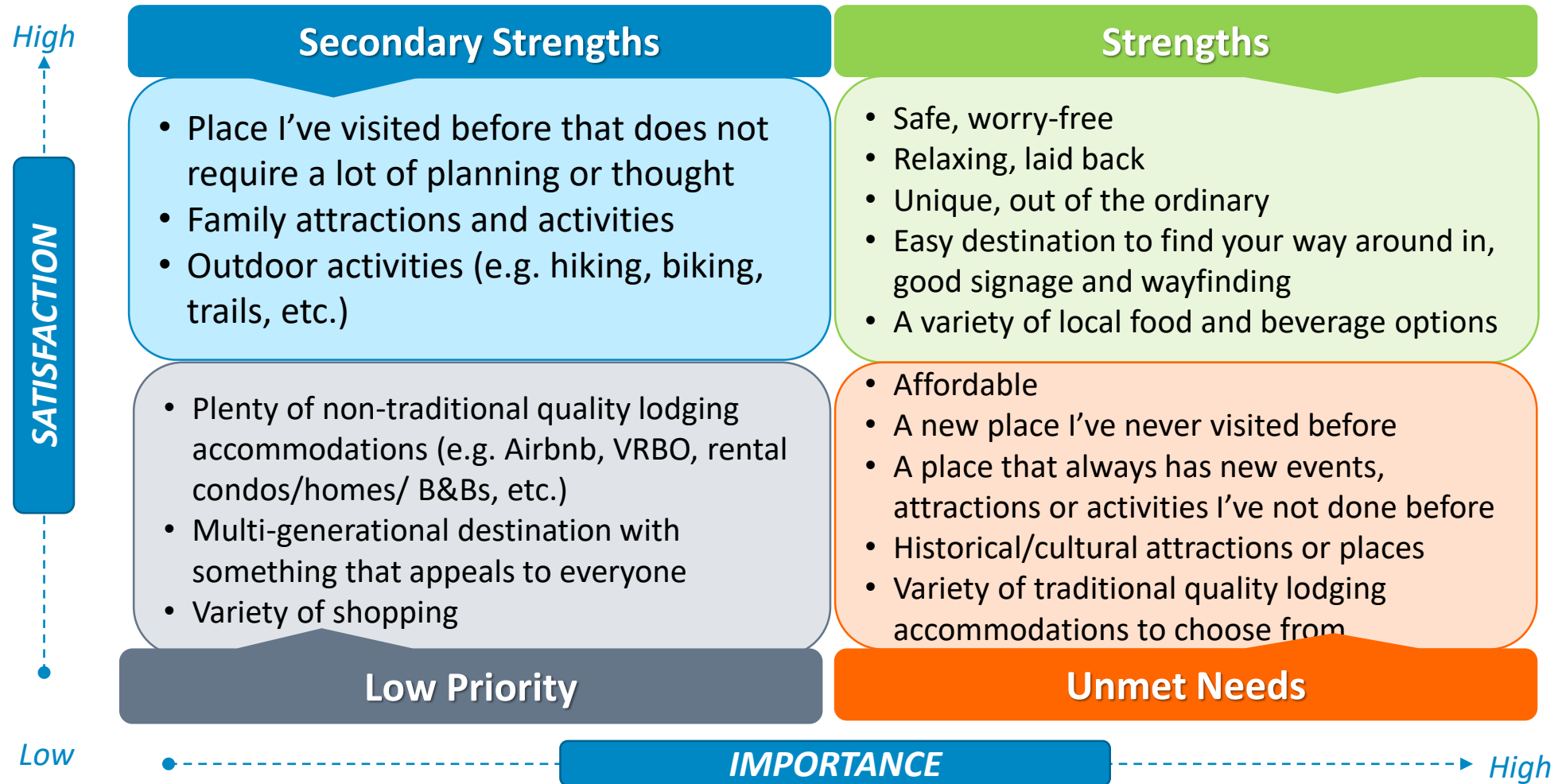
Each of Blowing Rock's attributes has been analyzed and segmented into four buckets in the chart to the right. This analysis evaluates the relative importance of each element of the brand alongside visitors' satisfaction with each attribute as it relates to Blowing Rock.

The resulting analysis illustrates which elements of satisfaction are most important by plotting each characteristic into one of four quadrants.





# Blowing Rock's strengths including being safe/worry-free and relaxing/laid back. Visitors would like for it to offer new things to do and have more lodging options.

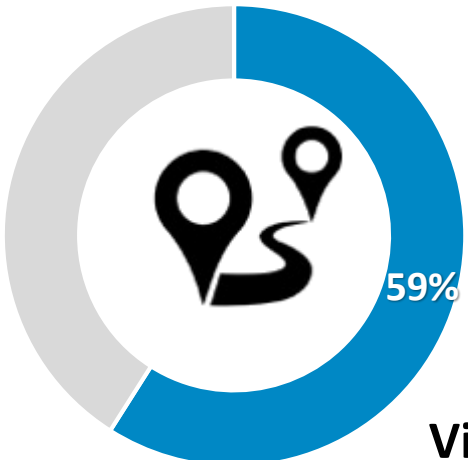


Q19: Please rate how well you believe the following attributes describe Blowing Rock, NC.

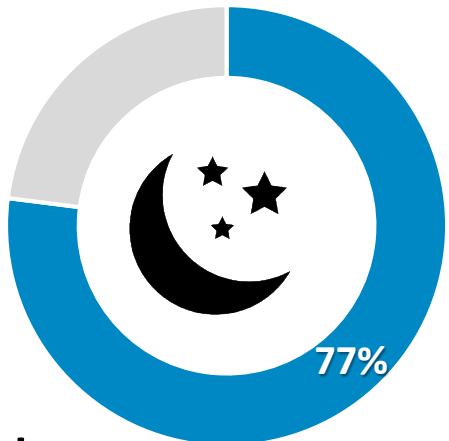
# Visitor Behavior KPIs



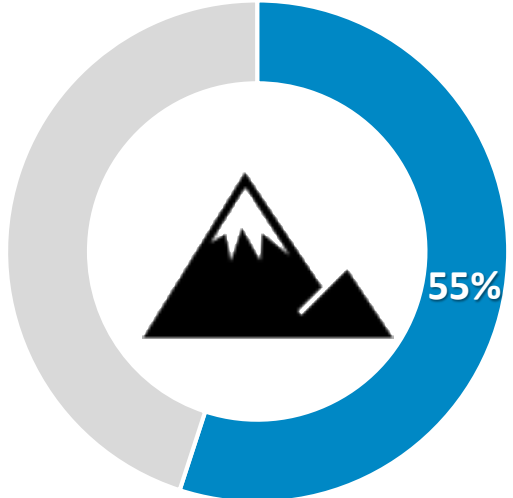
**Weekend Getaway**



**Spent the Night**

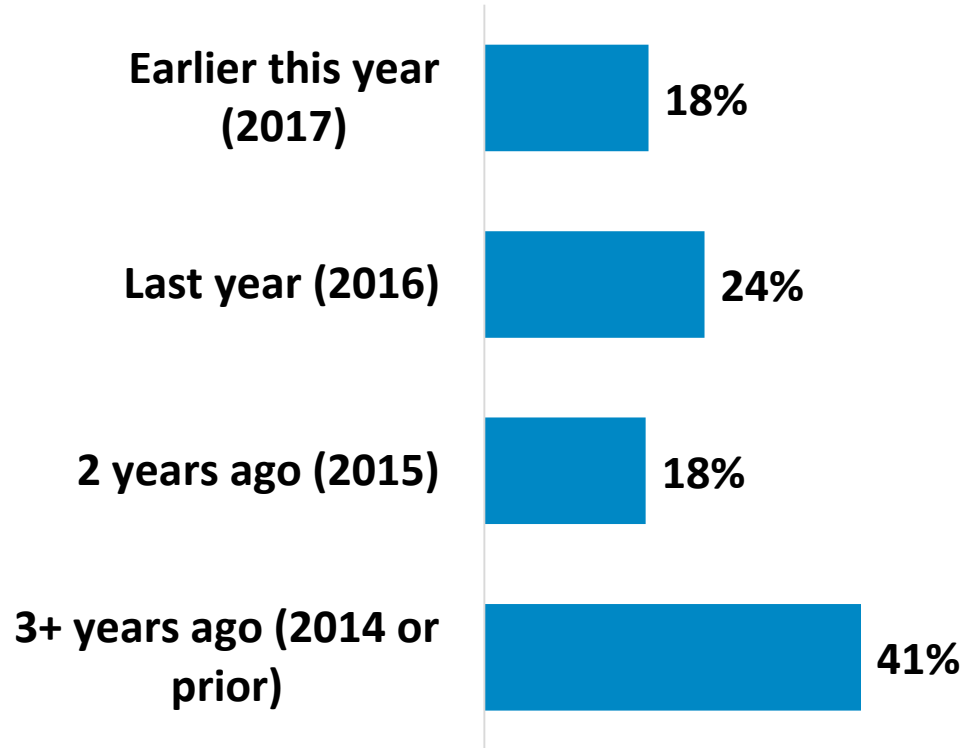


**Visited Blue Ridge Parkway**



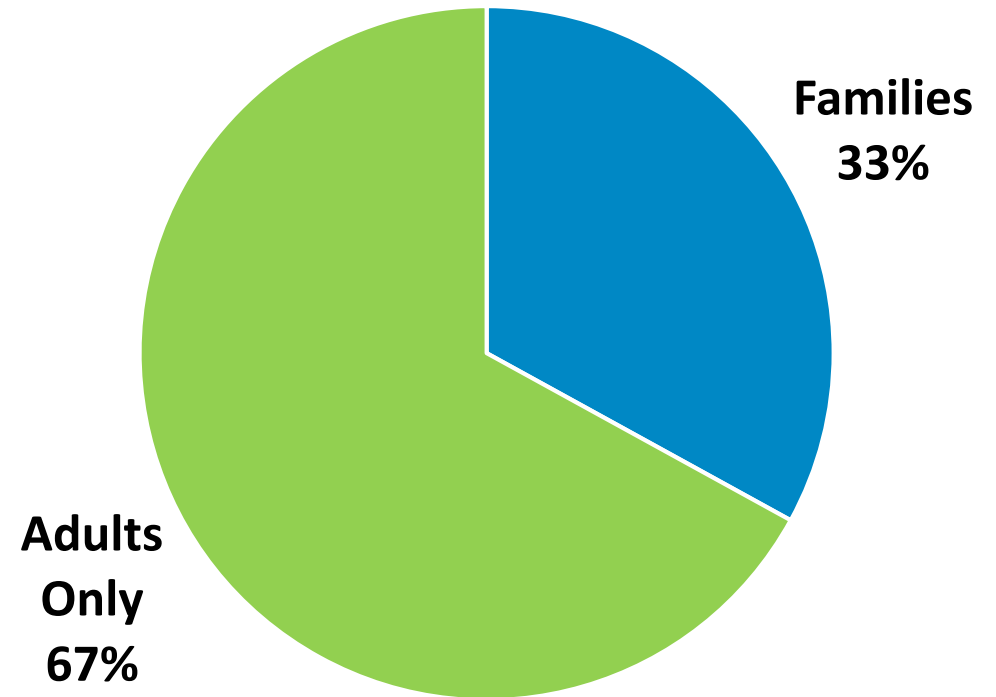
# Most visitors in this study last visited Blowing Rock within the past two years, with two-thirds of that visitation came from adult visitors without children.

### Most Recent Visit



RESPONDENT BASE: VISITED BLOWING ROCK (EVER) | N=341

### Visitor Composition



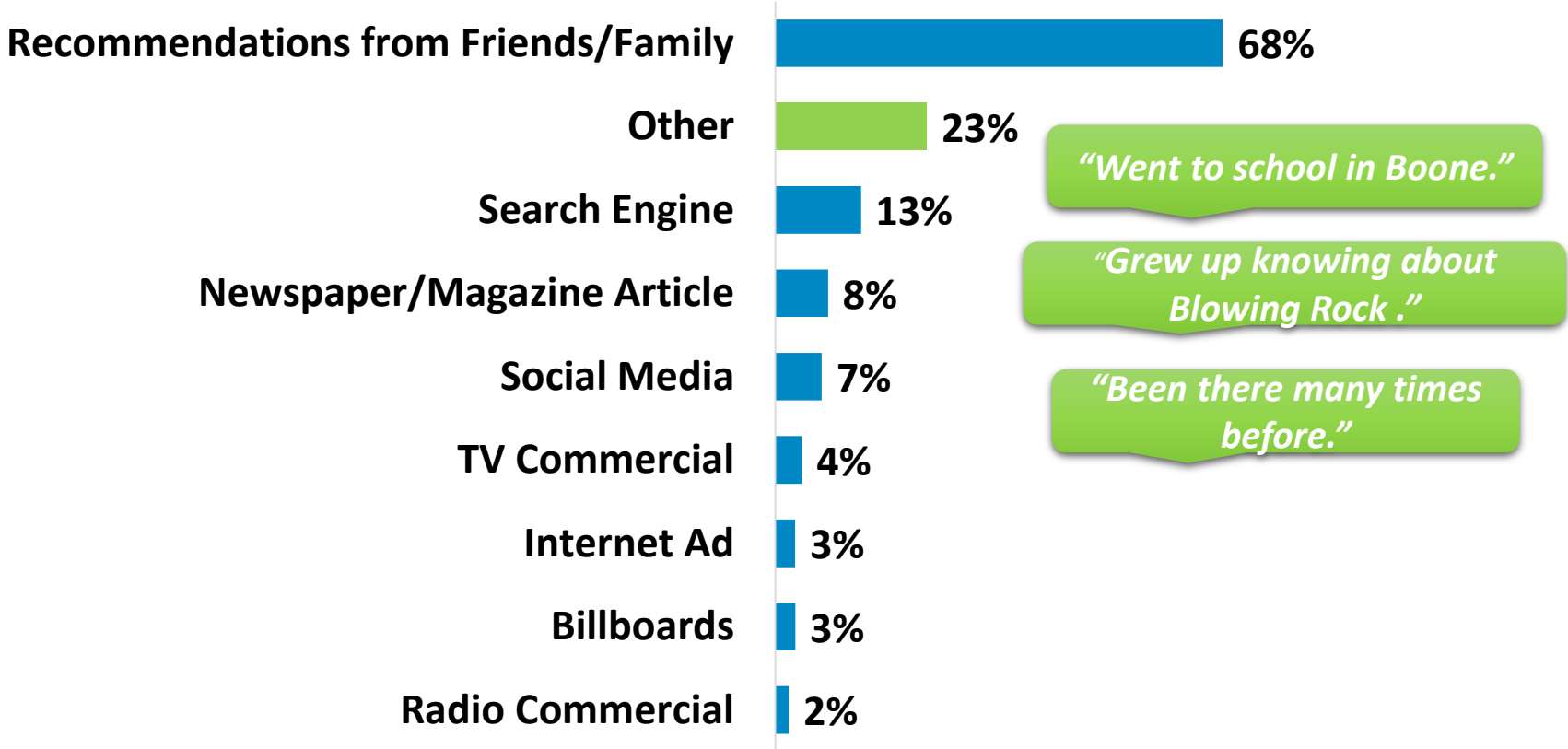
RESPONDENT BASE: RECENT BLOWING ROCK VISITORS (2015, 2016 OR 2017) | N=201

Q21: When was your most recent visit to Blowing Rock?

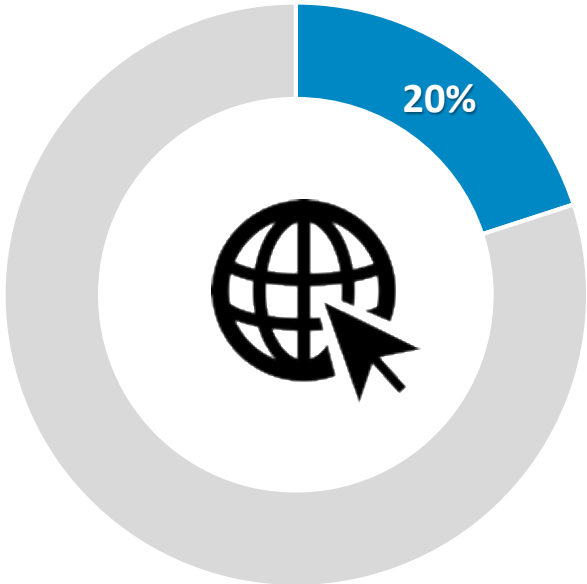
Q26: How many people in your immediate travel party on this trip, including yourself, fell into the following age categories:

# Blowing Rock thrives on word-of-mouth advertising. More than two-thirds heard about it from recommendations of friends/family. And, one-fifth visited the Blowing Rock tourism website to plan their visit.

## How Visitors Heard About Blowing Rock

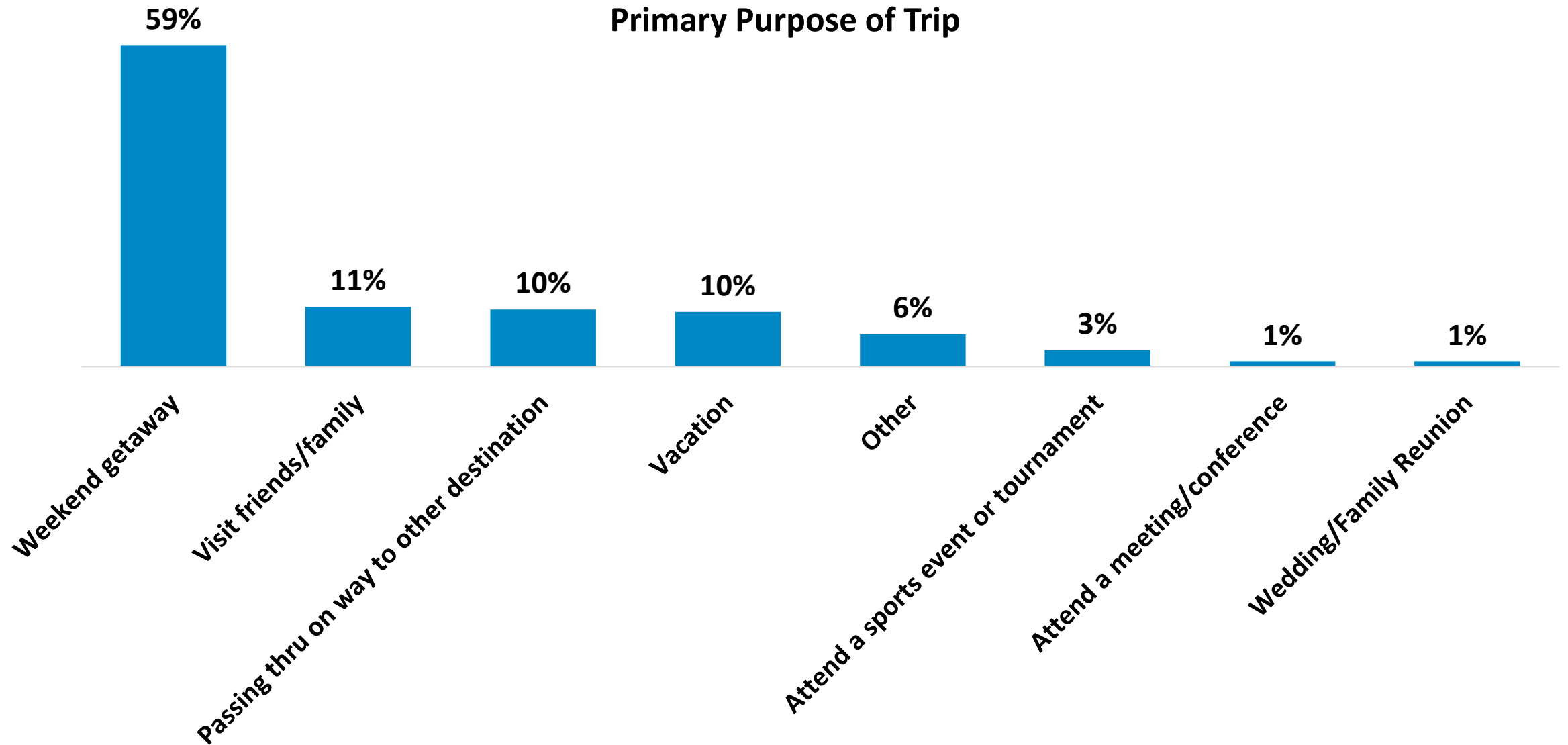


## Visited [www.BlowingRock.com](http://www.BlowingRock.com) to Plan Visit



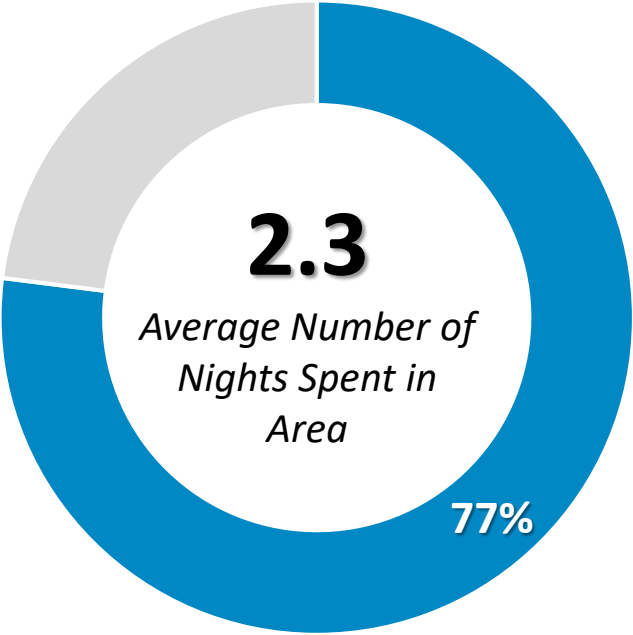
Q23: How did you hear about Blowing Rock, NC? Please check all that apply.  
 Q24: Did you visit the Blowing Rock tourism website, [www.BlowingRock.com](http://www.BlowingRock.com) as a part of planning your visit?

# Weekend getaways are the primary reason travelers visit Blowing Rock, followed distantly by visiting friends & family.

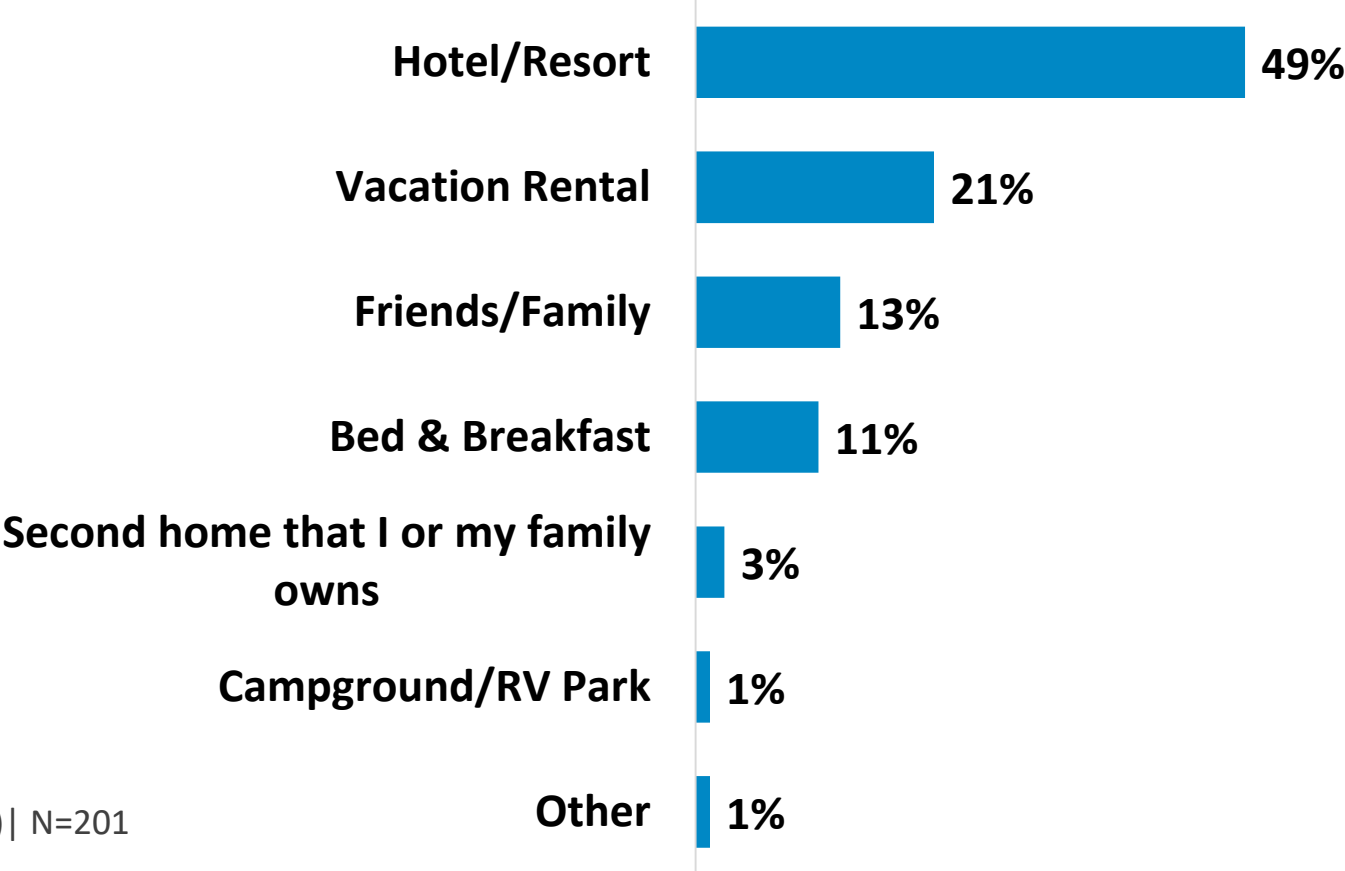


# Most visitors (77%) spend the night, and those who do stay an average of 2.3 nights— half of whom say they stayed at a hotel/resort.

### % Spent the Night in Blowing Rock



### Accommodations for Overnight Visitors



RESPONDENT BASE: RECENT BLOWING ROCK VISITORS (2015, 2016 OR 2017)| N=201

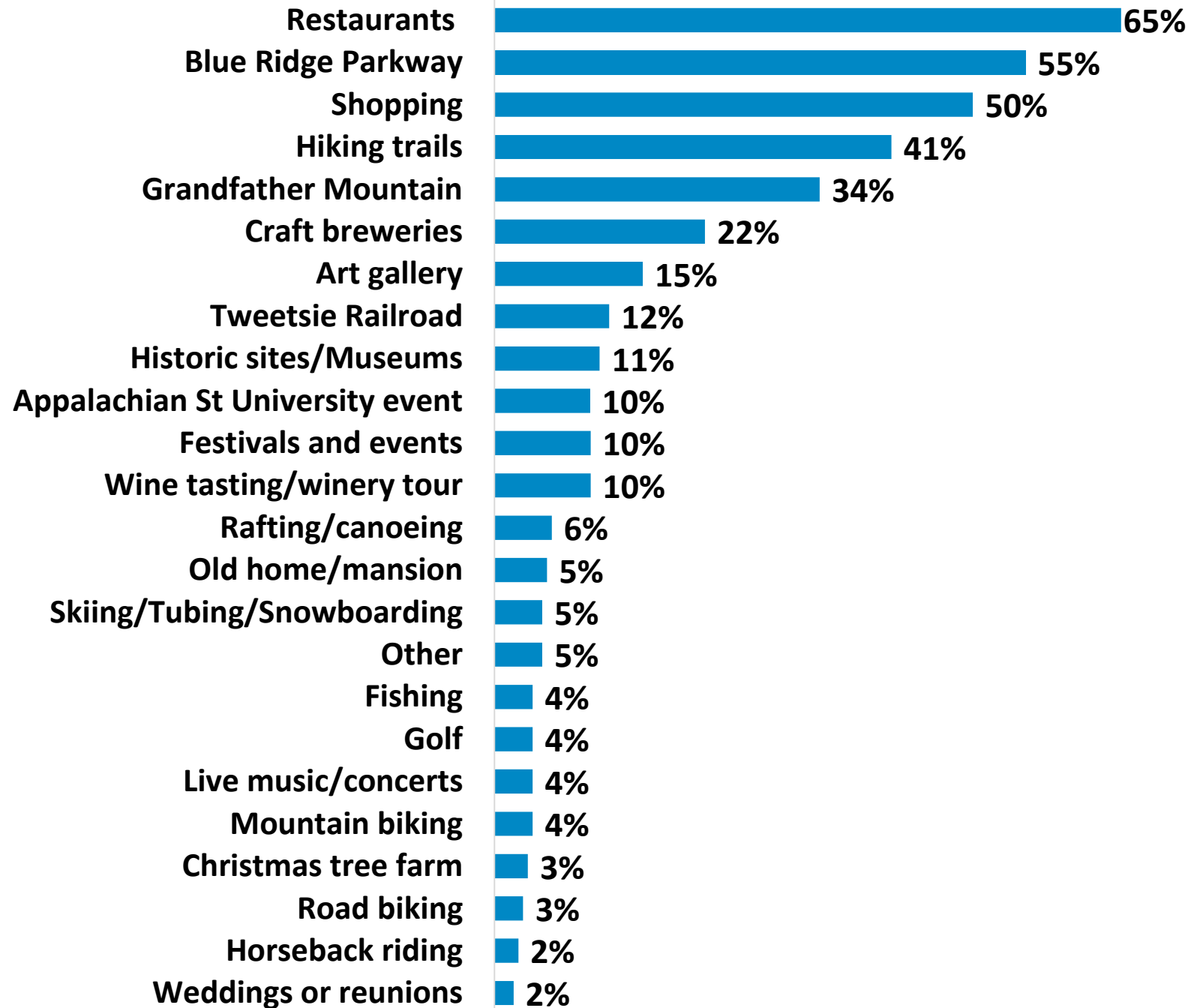
Q27: How many nights did you spend in the Blowing Rock, NC area on that visit?  
Q28: Which of the following best describes the accommodations you used for that stay?

RESPONDENT BASE: VISITORS WHO SPENT THE NIGHT| N=154

# Area Activity Participation

Blowing Rock visitors participated in a wide variety of area activities during their visit to the area.

Apart from restaurants and shopping, the most participated in activities revolve around nature—like Blue Ridge Parkway, hiking trails and Grandfather Mountain.



# The functional drivers for visiting Blowing Rock include the area's outdoor activities, restaurants and shopping.

## Blowing Rock Functional Drivers\*



**29%**

*Blue Ridge Parkway*



**22%**

*Grandfather Mountain*



**20%**

*Restaurants*



**19%**

*Hiking Trails*



**16%**

*Shopping*

\*Functional drivers are the destination's features that inspire visitors to travel to the area.

Q30: Of these activities, please indicate if there were any that were a major influence in your decision to visit Blowing Rock, NC on that visit.

RESPONDENT BASE: RECENT VISITORS WHO PARTICIPATED IN ACTIVITIES | N=200



# Visitor Profiles by Income

**Blowing Rock's affluent visitors exhibit several key differences compared to those who earn less than \$150k.**

Affluent visitors are slightly older and are significantly more likely to visit without children. They are also significantly more likely to visit as a weekend getaway and spend the night in the area.

While fewer affluent guests use the TDA website to plan their visit, they are far more likely to recommend the area to their friends.

	Visitors with HHI <\$150k	Visitors with HHI \$150k+
Average Adult Party Age	44.8	48.1
Average Child Party Age	9.8	8.0
Party Size	3.07	3.06
<b>Family Visitors</b>	<b>40%</b>	<b>29%</b>
Adult Visitors	60%	71%
Household Income	\$82.6K	\$201.5K
Distance from Blowing Rock	148 miles	122 miles
<b>Primary Purpose – Weekend Getaway</b>	<b>50%</b>	<b>64%</b>
Spent the Night	72%	80%
Number of Nights Spent in Area	2.5	2.3
<b>Visited <a href="http://www.BlowingRock.com">www.BlowingRock.com</a></b>	<b>30%</b>	<b>15%</b>
<b>Net Promoter Score</b>	<b>15%</b>	<b>26%</b>
Intent to Visit Blowing Rock	40%	44%

# Visitor Profiles Seasonality

**Overall, visitors appear fairly similar throughout each season of visitation to Blowing Rock.**

While adult visitors drive visitation throughout the year, family visitation dips in the Fall and Winter seasons. Those that visit in Fall are also slightly more likely to visit for a weekend getaway and have a higher household income.

	Winter* (Dec-Feb)	Spring (Mar-May)	Summer (Jun-Aug)	Fall (Sep-Nov)
Average Adult Party Age	45.1	46.7	47.7	46.8
Average Child Party Age	8.4	9.5	9.0	9.3
Party Size	2.95	3.17	2.88	3.02
Family Visitors	28%	35%	33%	28%
Adult Visitors	72%	65%	67%	72%
Household Income	\$156.4k	\$151.7k	\$159.8k	\$170.1k
Distance from Blowing Rock	111 miles	123 miles	123 miles	116 miles
Primary Purpose – Weekend Getaway	54%	53%	50%	62%
Spent the Night	71%	75%	70%	77%
Number of Nights Spent in Area	2.7	2.4	2.3	2.2
Visited <a href="http://www.BlowingRock.com">www.BlowingRock.com</a>	12%	22%	17%	17%
Net Promoter Score	61.0%	48.3%	52.0%	52.5%
Intent to Visit Blowing Rock	71%	78%	70%	64%

\*Only 41 respondents visited during Winter—therefore, data should be used for directional purposes only.

**Brand Promoters are valuable as they recommend destinations to friends/family. Promoters for Blowing Rock are slightly older and have slightly older children, and earn a higher income than non-visitors to the area.**

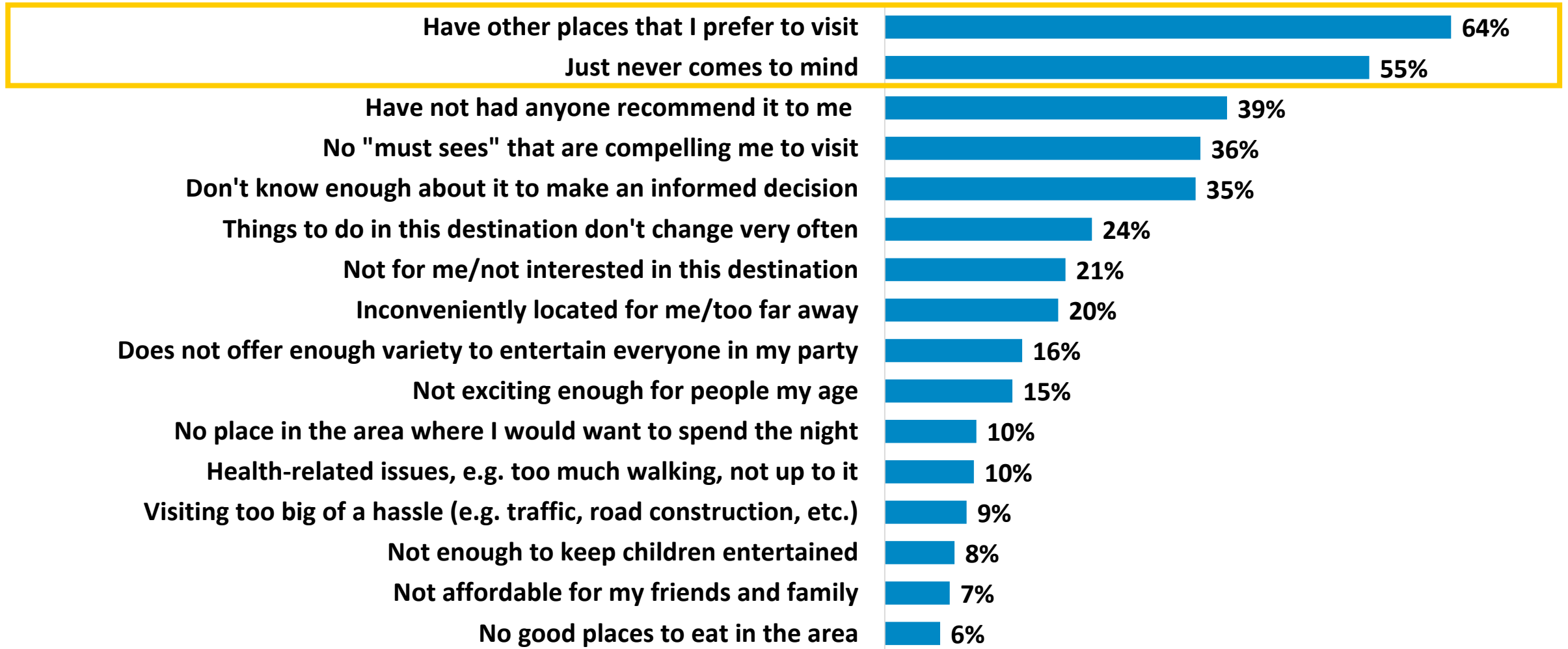
	<b>Visitors</b>	<b>Non-Visitors*</b>	<b>Promoters**</b>
Average Adult Party Age	47.0	47.8	48.5
Average Child Party Age	8.8	8.1	9.4
Party Size	3.1	2.5	2.9
Family Visitors	33%	43%	33%
Adult Only Visitors	67%	57%	67%
Intent to Visit Blowing Rock	42%	19%	66%
Household Income	\$151.6k	\$122.7k	\$153.3k
Distance from Blowing Rock	133 miles	199 miles	135 miles

\*Non-Visitors' demographics are that of their household, not of their travel party.

\*\*Rated Blowing Rock's Net Promoter Score a 9 or 10.

# Non-recent visitors have other places they prefer to visit and say Blowing Rock simply doesn't come to mind.

**% Agree/Strongly Agree**



Q33: Using the scale provided, please rate how strongly you agree with the following reasons for why you have not visited Blowing Rock in the past 24 months, if ever?

RESPONDENT BASE: HAVEN'T VISITED BLOWING ROCK OR INACTIVE VISITORS | N=365

## Stated vs. Derived Hurdles

- On the surface, non-visitors often provide fairly standard excuses for not visiting, which we refer to as *stated hurdles* to visitation.
- Correlation analysis reveals to what extent non-visitors' stated hurdles match up with their intent to visit Blowing Rock. Arguably, the higher the correlation a hurdle has with intent to visit, the more credible the hurdle is as a root cause of not visiting. Those that correlate highest are referred to as *derived hurdles*.



### Stated Hurdles

(what travelers *said* is keeping them from visiting Blowing Rock)

### Derived Hurdles

(what *actually* correlates with their intent to visit Blowing Rock)

# True hurdles to visiting include a lack of interest, no changes in things to do, and a preference for other destinations.

## STATED HURDLES

1. Have other places that I prefer to visit
2. Just never comes to mind
3. Have not had anyone recommend it to me
4. No "must sees" that are compelling me to visit
5. Don't know enough about it to make an informed decision
6. Things to do in this destination don't change very often
7. Not for me/not interested in this destination
5. Inconveniently located for me/too far away
9. Does not offer enough variety to entertain everyone in my traveling party
10. Not exciting enough for people my age
11. No place in the area where I would want to spend the night
12. Health-related issues, e.g. too much walking, not up to it
13. Visiting has just become too big of a hassle (e.g. traffic, road construction, etc.)
14. Not enough to keep children entertained
15. Not affordable for my friends and family
16. No good places to eat in the area

## DERIVED HURDLES

1. Not for me/not interested in this destination
2. Things to do in this destination don't change very often
3. Have other places that I prefer to visit
4. Just never comes to mind
5. No "must sees" that are compelling me to visit
6. Does not offer enough variety to entertain everyone in my traveling party
7. Not exciting enough for people my age
5. Have not had anyone recommend it to me
9. Health-related issues, e.g. too much walking, not up to it
10. Inconveniently located for me/too far away
11. No place in the area where I would want to spend the night
12. Don't know enough about it to make an informed decision
13. No good places to eat in the area
14. Not affordable for my friends and family
15. Not enough to keep children entertained
16. Visiting has just become too big of a hassle (e.g. traffic, road construction, etc.)

Q33: Using the scale provided, please rate how strongly you agree with the following reasons for why you have not visited Blowing Rock in the past 24 months, if ever?

# Non-recent visitors say having more information about Blowing Rock and new events/ attractions would motivate or inspire them to consider it in the future.

## Motivate/Inspire Future Visits to Blowing Rock

**MORE INFORMATION – 25.7%**

*“I need more information as to attractions or interests that might appeal to me.”*

**SPECIAL DEAL/DISCOUNT – 14.9%**

*“Package trip for a good price.”*

**NEW EVENTS/ATTRACTIONS - 10.0%**

*“More events. Blowing Rock never seems to change so I don't have a lot of reasons for a return visit.”*

**RECOMMENDATIONS – 4.0%**

*“If someone recommended it to me.”*

Q34: What, if anything, do you think might motivate or inspire you to visit the Blowing Rock area in the future?

RESPONDENT BASE: HAVEN'T VISITED BLOWING ROCK OR INACTIVE VISITORS | N=365

**Those likely to visit are younger, more likely to have children and live slightly closer to the area. They are also slightly more likely to be a minority.**

	<b>Overall</b>	<b>Likely to Visit</b>	<b>Unlikely to Visit</b>
Average Adult Age	48.2	45.4	50.0
Average Child Age	8.8	9.4	9.4
Household Size	2.5	2.6	2.5
Families	44%	50%	41%
Adults	56%	50%	59%
Respondent Age	49.2	45.5	51.6
Caucasian	84%	78%	90%
Household Income	\$135.0k	\$146.1k	\$139.5k
Live with 100 miles of Blowing Rock	32%	52%	38%
Distance from Blowing Rock	171 miles	132 miles	157 miles

*NOTE: Intent to visit Blowing Rock was only asked of those travelers familiar with Blowing Rock.*



## Insights and Observations

- Blowing Rock has relatively strong word-of-mouth as a destination. Visitor satisfaction appears to be high, and the community continues to attract new visitors.
- If Blowing Rock somewhat lags behind other destinations in word-of-mouth, it's likely because it just doesn't change very much. That, of course, is also part of the appeal--the aided traits travelers believe best describe Blowing Rock include small town (60%), relaxed (52%), quaint (49%) and for families (49%). But it does tamp down "buzz" about the destination.
- Other barriers to visitation and positive word-of-mouth include a perceived lack of a variety of accommodations and certain types of attractions.
- While road construction does not show up in the research as a significant barrier to visitation, many years of road building may have had a corrosive impact upon consideration to visit and likelihood to return.



## Insights and Observations

- Blowing Rock stands out for being an Outdoor Adventure destination, and Nature is strongly tied to the Blowing Rock brand. Nearly one in five (17%) familiar with Blowing Rock said the word mountain comes to mind when thinking of the destination, while 6% said hiking and 5% said outdoors. And, after spending time with friends/loved ones, spending time outdoors is a top emotional driver among visitors to the area (68%).
- These are traits that resonate strongly with travelers, particularly those who live in many of Blowing Rock's top source markets. There is a strong emotional appeal that can continue to be developed as a market positioning and owned by Blowing Rock as a destination.



## Insights and Observations

- Blowing Rock's primary strengths also include that the destination is safe/worry-free, relaxing/laid back and unique/out of the ordinary. Visitors also think the area is easy to get around and offers a variety of local food and beverage options.
- Secondary strengths include Blowing Rock's outdoor activities and family attractions/ activities. Visitors also appreciate that they've visited before so the trip doesn't require a lot of planning.
- Affluent visitors have some notable differences from visitors who are less wealthy. Compared to those who earn less than \$150k annually, affluent visitors are significantly more likely to visit without children in their travel party (71% vs. 60%). They are also significantly more likely to visit as a weekend getaway (+14 points) and spend the night in the area (+8 points).



## Insights and Observations

- Correlation analysis revealed the top hurdle hindering visits is that travelers aren't interested in the destination and don't think it's for them. The second challenge facing Blowing Rock is that travelers believe things to do there don't change very often. The third issue is in line with the top stated reason—travelers have other places they prefer to visit.
- A lack of interest and preference for other destinations can be a unique challenge to tackle, but the silver lining is that there are many travelers in the region who have yet to visit Blowing Rock and simply don't know it yet.
- Many of Blowing Rock's key markets are becoming younger and are magnets for Millennials. The destination has many assets which appeal to their interests.



## Insights and Observations

- One in five surveyed travelers (17%) have considered visiting Blowing Rock but never have, and 25% are lapsed visitors having not visited in the past two years. These travelers need a reason to visit or return to the area. In order to convert these prospects into visitors, Blowing Rock must use its greatest brand strengths to create campaigns and a website that resonate emotionally but also tackles their hesitation.
- Recommendations and references from friends and family have equity that paid ads do not. Many non-visitors also said recommendations from friends/family would inspire them to visit. Given that nearly half of Blowing Rock visitors (44%) said they would recommend the area to friends/family, converting more visitors into brand advocates would generate a high return on investment



# Thank You!



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