



# 2018 Blowing Rock Database Survey Research

## May 2018

# Project Overview

## PURPOSE

Working with its partner H2R Market Research, Magellan Strategy Group was asked to provide an update to Blowing Rock tourism stakeholders on visitor demographics, destination perceptions, and visit behaviors via an online survey.

## METHODOLOGY

Using the Blowing Rock TDA email database, an invitation to complete a brief online survey was distributed in mid-April 2018. This survey is very similar to the one that was used to measure leisure traveler perceptions and behaviors using an online panel sample in fall 2017 that included both visitors and non-visitors. A total of 406 travelers were surveyed, providing a maximum margin of error of +/-4.9% at the 95% confidence interval.

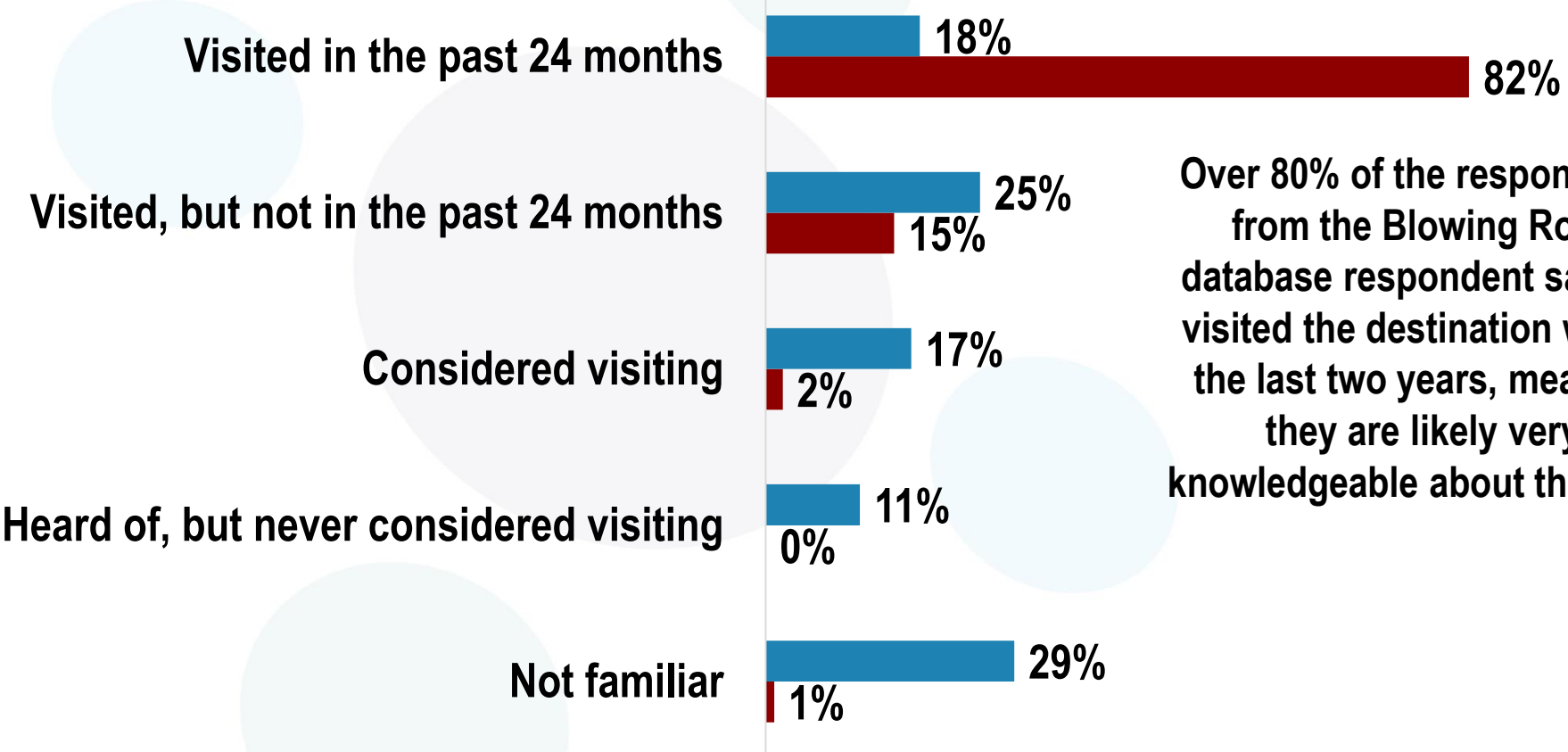
## IMPORTANT

Although the results of the 2017 and 2018 surveys are presented here side-by-side, they should not always be directly compared due to significant differences in sample sources (regional leisure traveler random sample vs. Blowing Rock e-newsletter sample).

# Awareness & Past Visitation – Blowing Rock

■ 2017 Panel

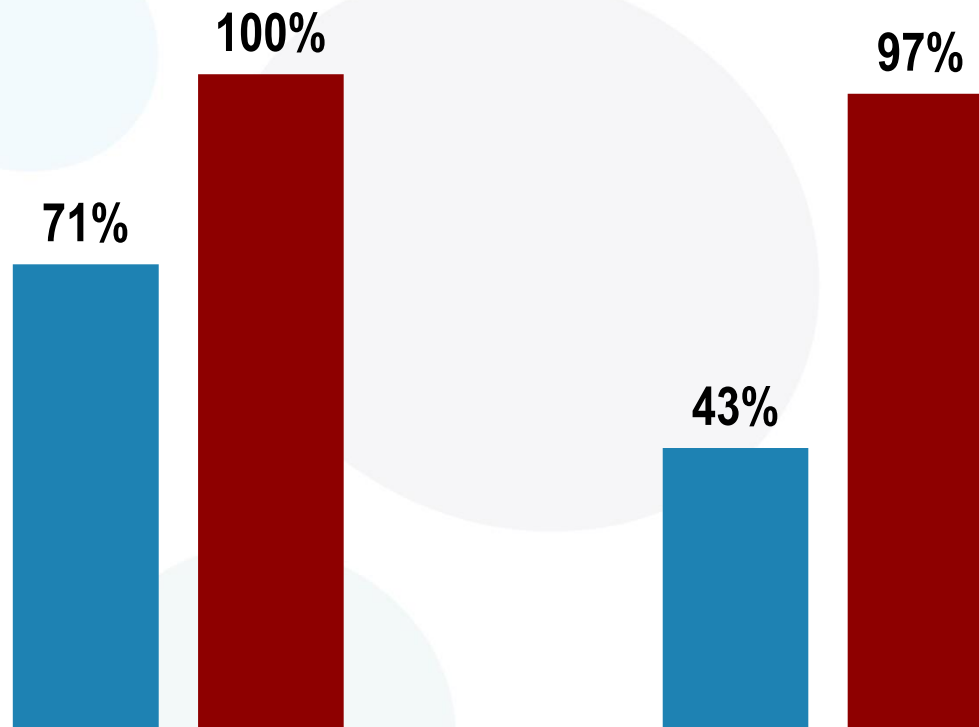
■ 2018 BR Database



Over 80% of the respondents from the Blowing Rock database respondent sample visited the destination within the last two years, meaning they are likely very knowledgeable about the area.

# Awareness & Past Visitation – Blowing Rock

■ 2017 Panel      ■ 2018 BR Database

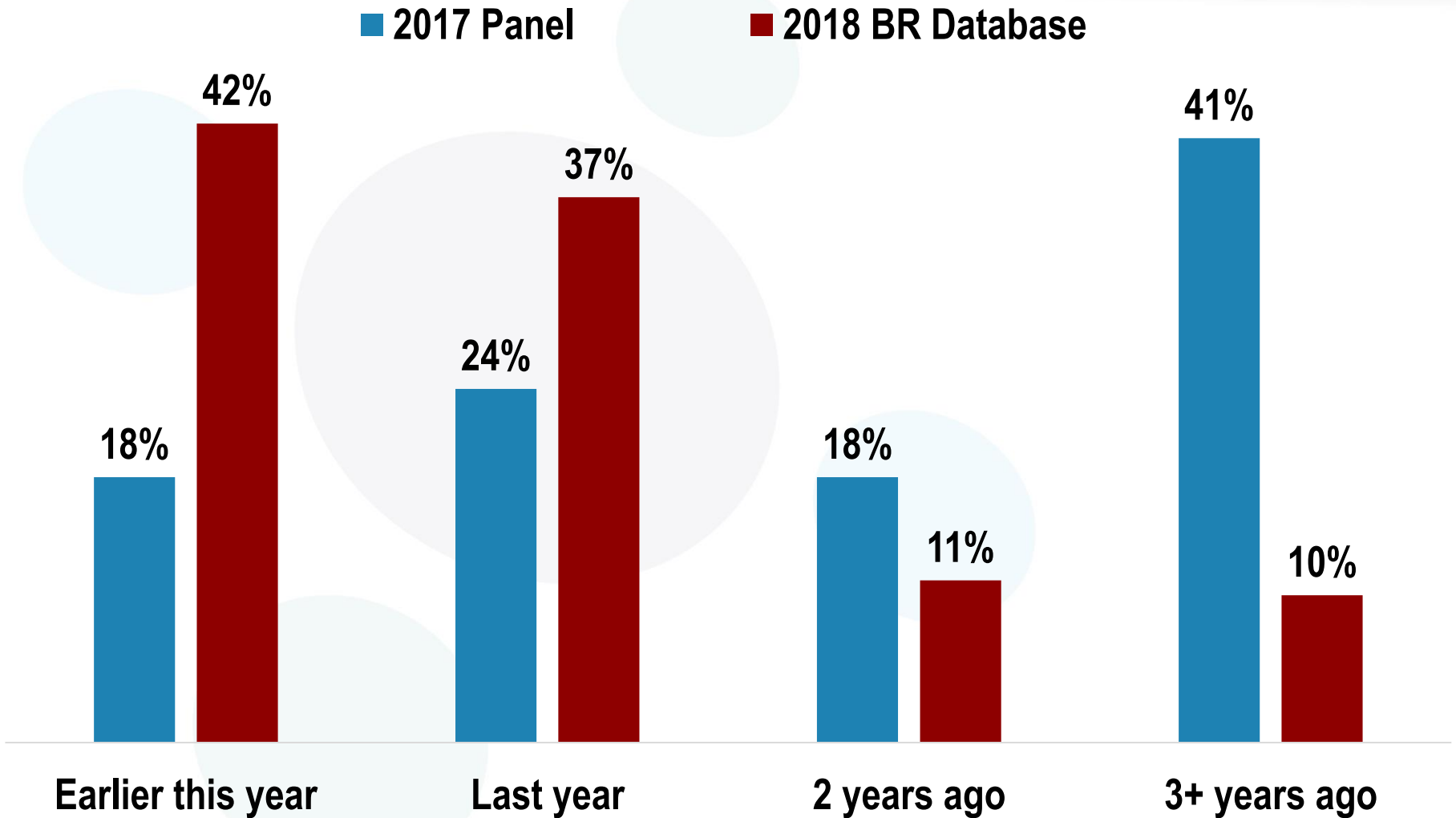


Nearly 100% of the respondents to the most recent database survey have ever visited Blowing Rock, most fairly recently.

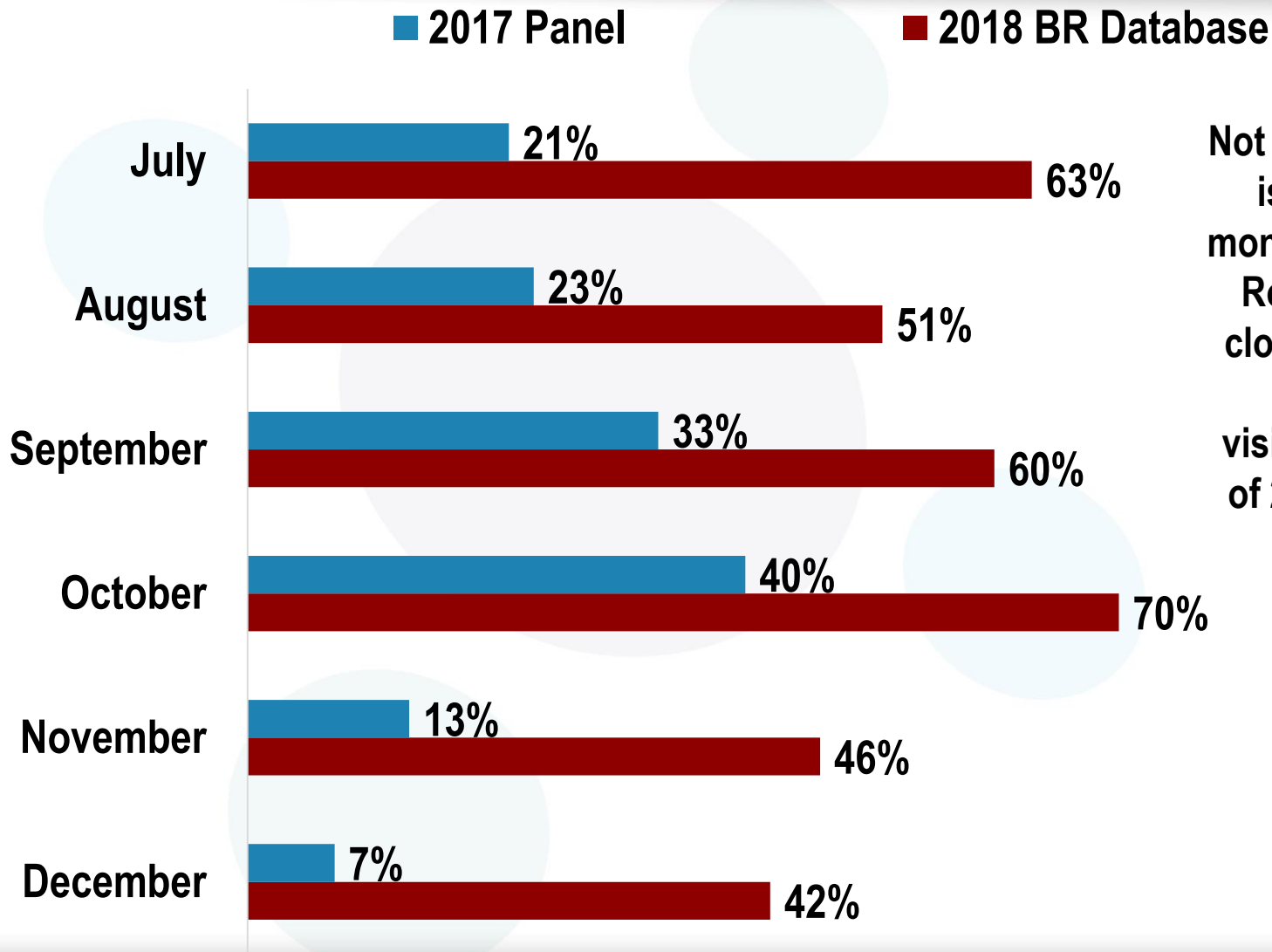
Familiar

Visited (Ever)

# Awareness & Past Visitation - Most Recent Visit

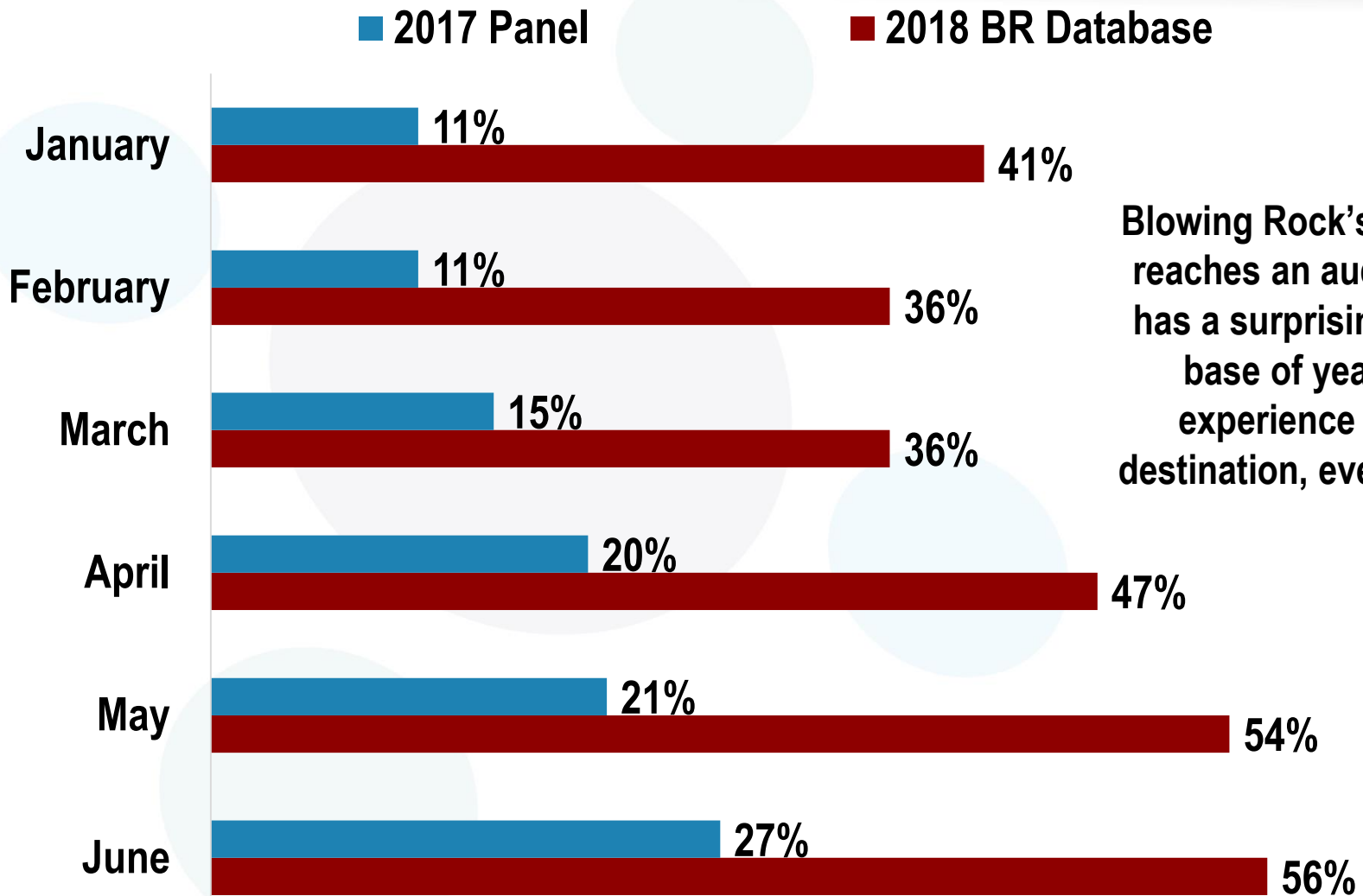


# Awareness & Past Visitation – Months Visited Over the Past 5 Years (1 of 2)



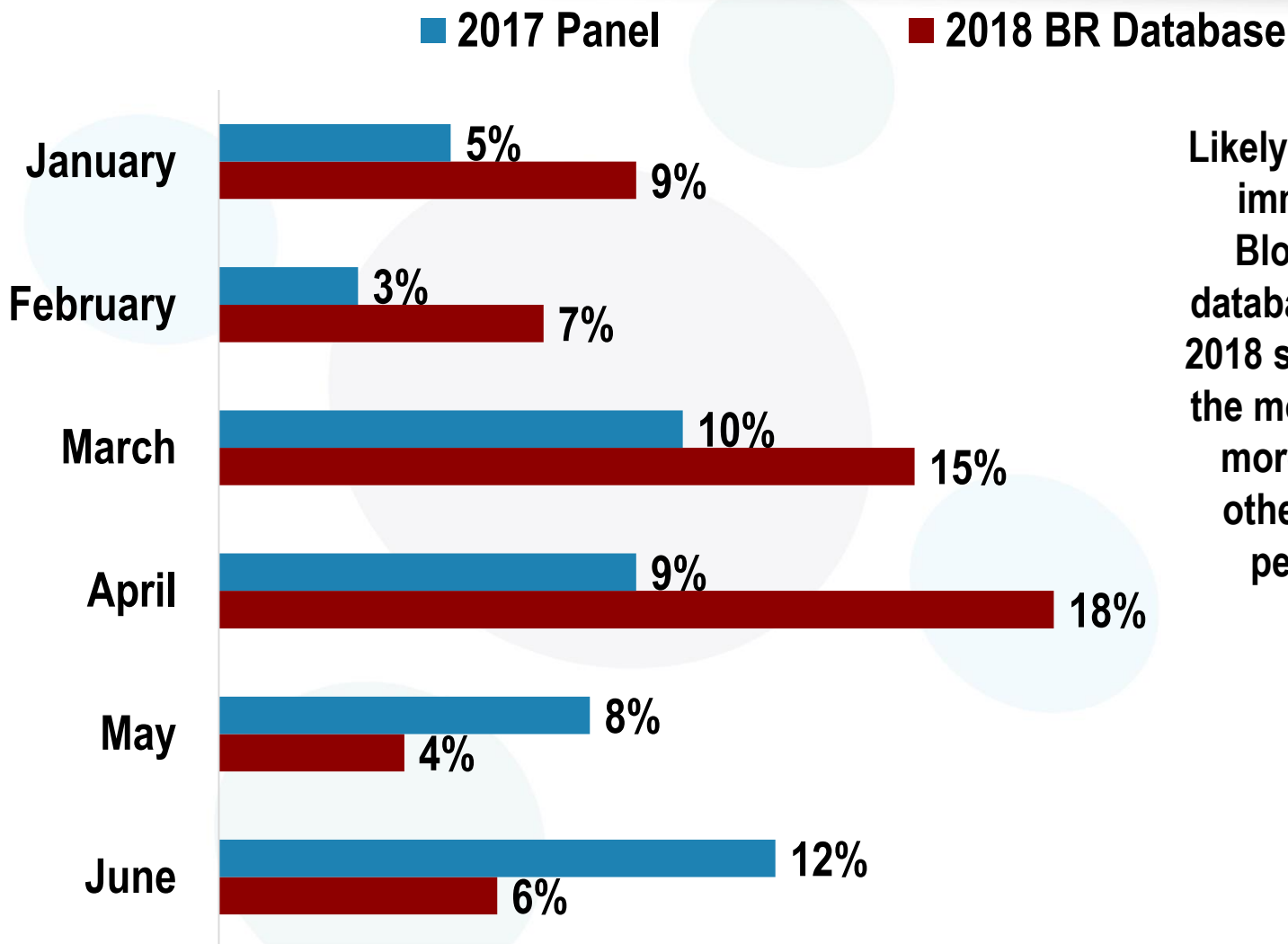
Not surprisingly, October is the most popular month for recent Blowing Rock visits, with July close behind, but every month has seen visitation by at least 1/3 of 2018 respondents in the last 5 years.

# Awareness & Past Visitation – Months Visited Over the Past 5 Years (2 of 2)



Blowing Rock's newsletter reaches an audience that has a surprisingly strong base of year-round experience with the destination, even in winter.

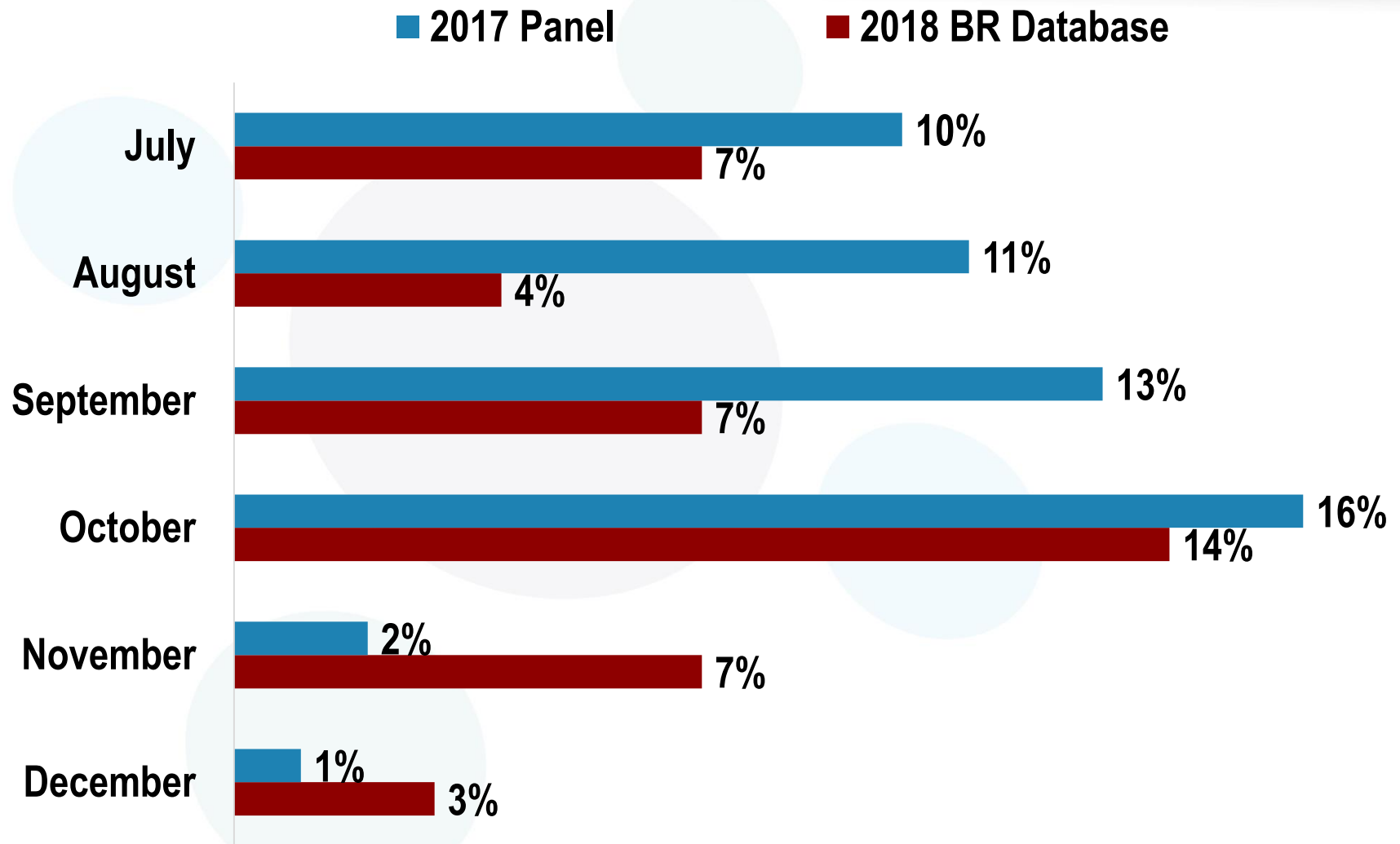
# Most Recent Visit to Blowing Rock – Month of Most Recent Visit (1 of 2)



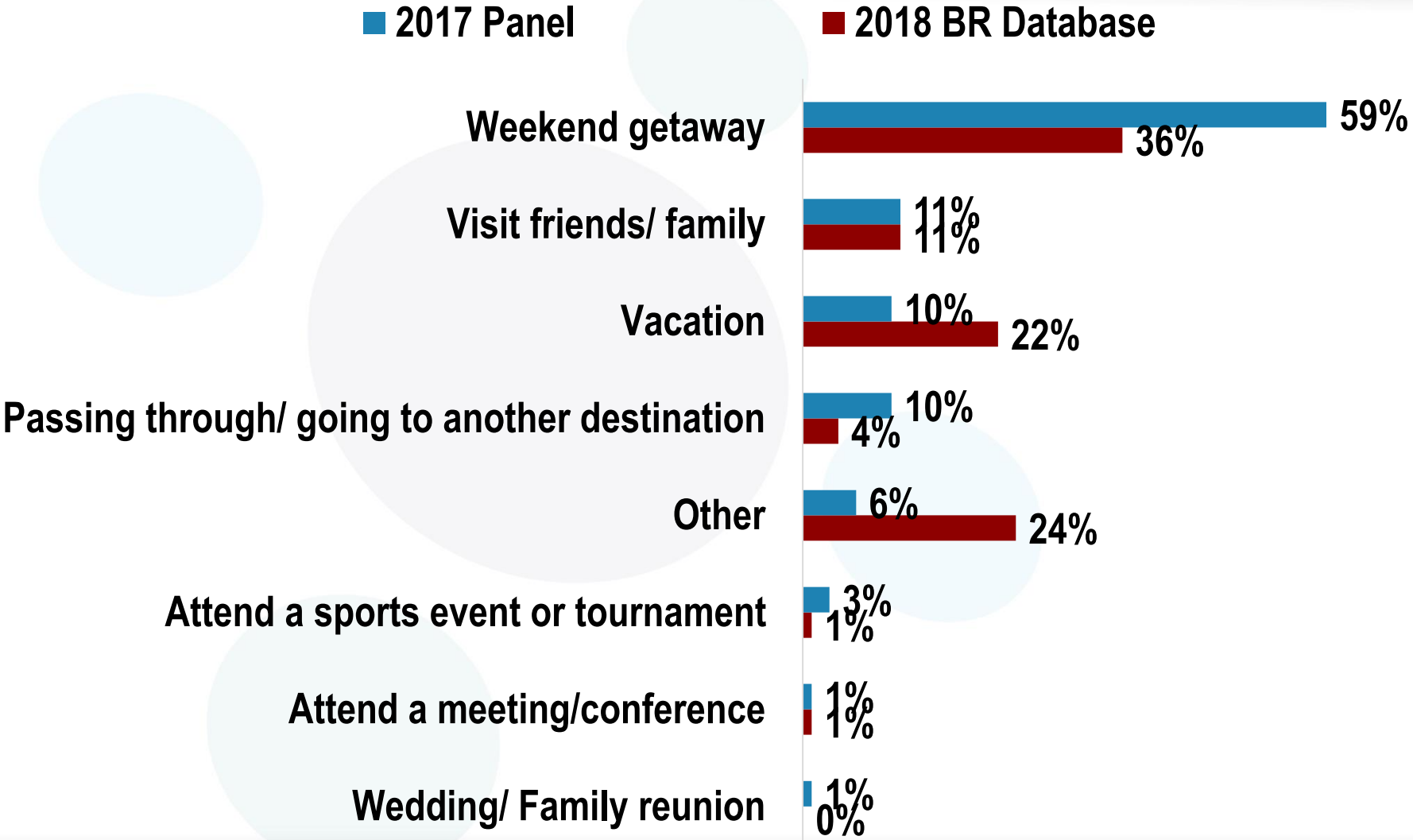
Likely reflecting their more immediate interest in Blowing Rock among database respondents, the 2018 sample said April was the month they had visited more recently than any other. (The survey was performed in April.)



# Most Recent Visit to Blowing Rock – Month of Most Recent Visit (2 of 2)



# Most Recent Visit to Blowing Rock – Primary Purpose of Most Recent Visit



# Most Recent Visit to Blowing Rock – Primary Purpose of Most Recent Visit: *Other*

**Survey respondents who replied to the question about the primary purpose of their most recent visit to Blowing Rock with “*Other*” cited the following reasons most frequently (in order of mention):**

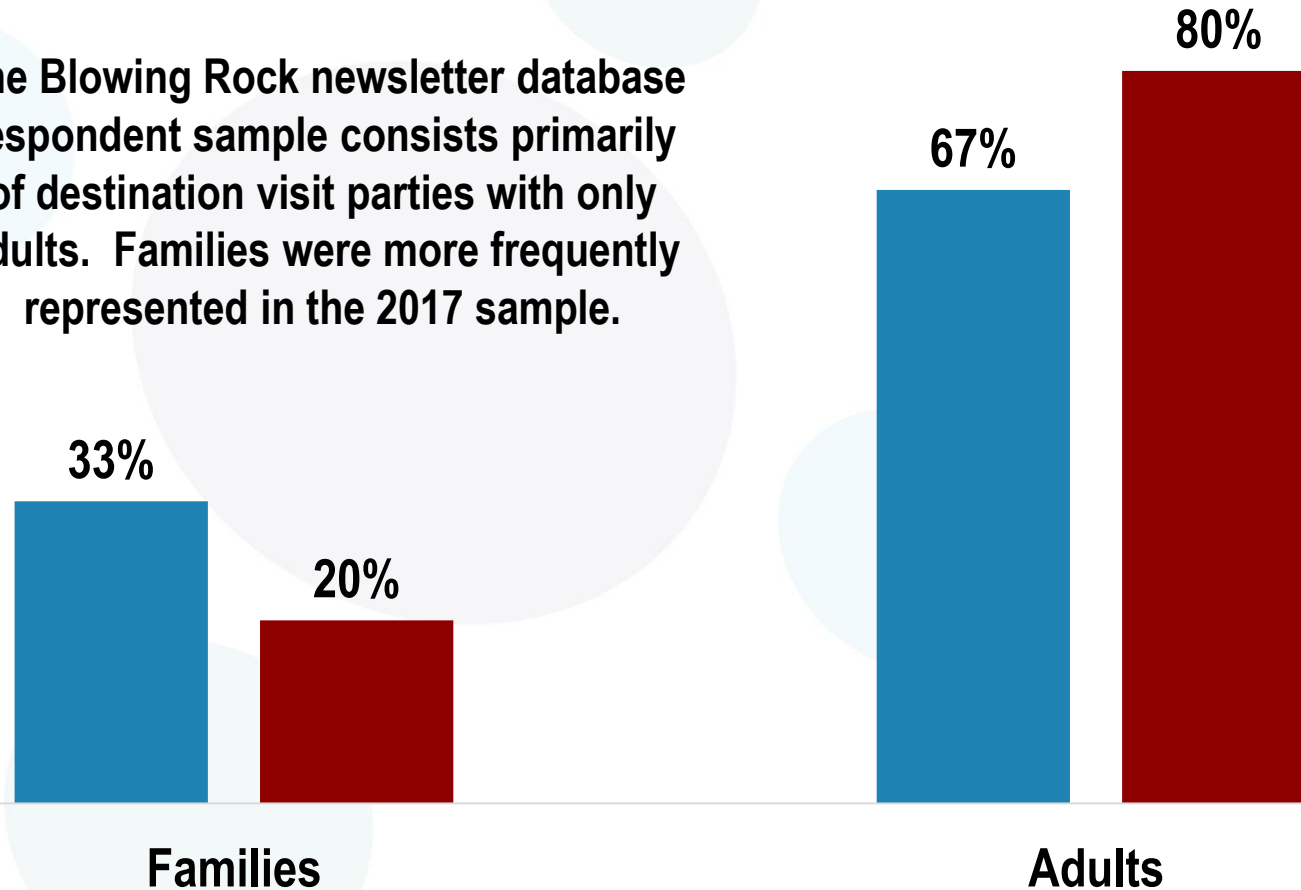
- 1. Live in area permanently or seasonally, or have a second home**
- 2. Shopping**
- 3. Dining**

# Most Recent Visit to Blowing Rock – Party Composition

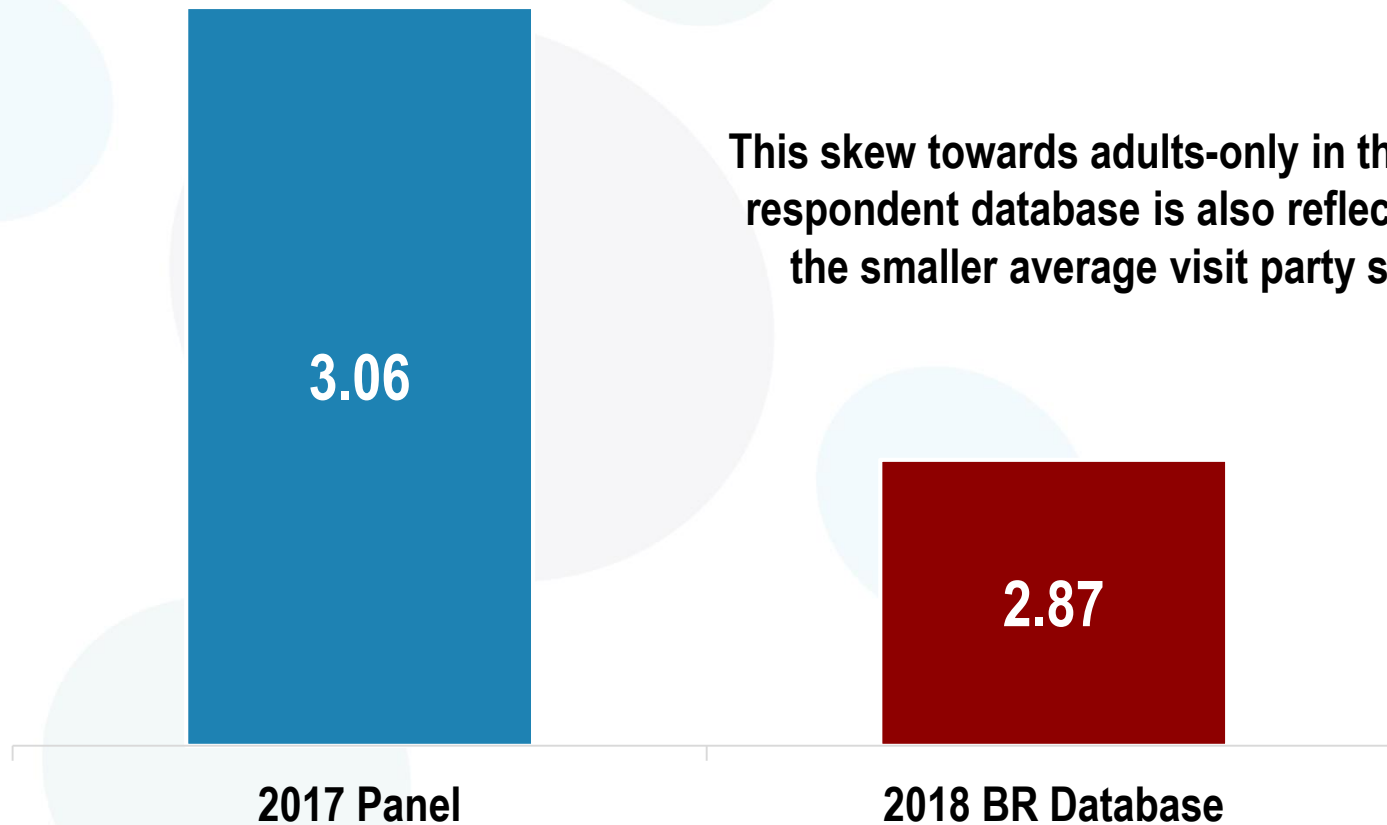
■ 2017 Panel

■ 2018 BR Database

The Blowing Rock newsletter database respondent sample consists primarily of destination visit parties with only adults. Families were more frequently represented in the 2017 sample.



# Most Recent Visit to Blowing Rock – Party Size

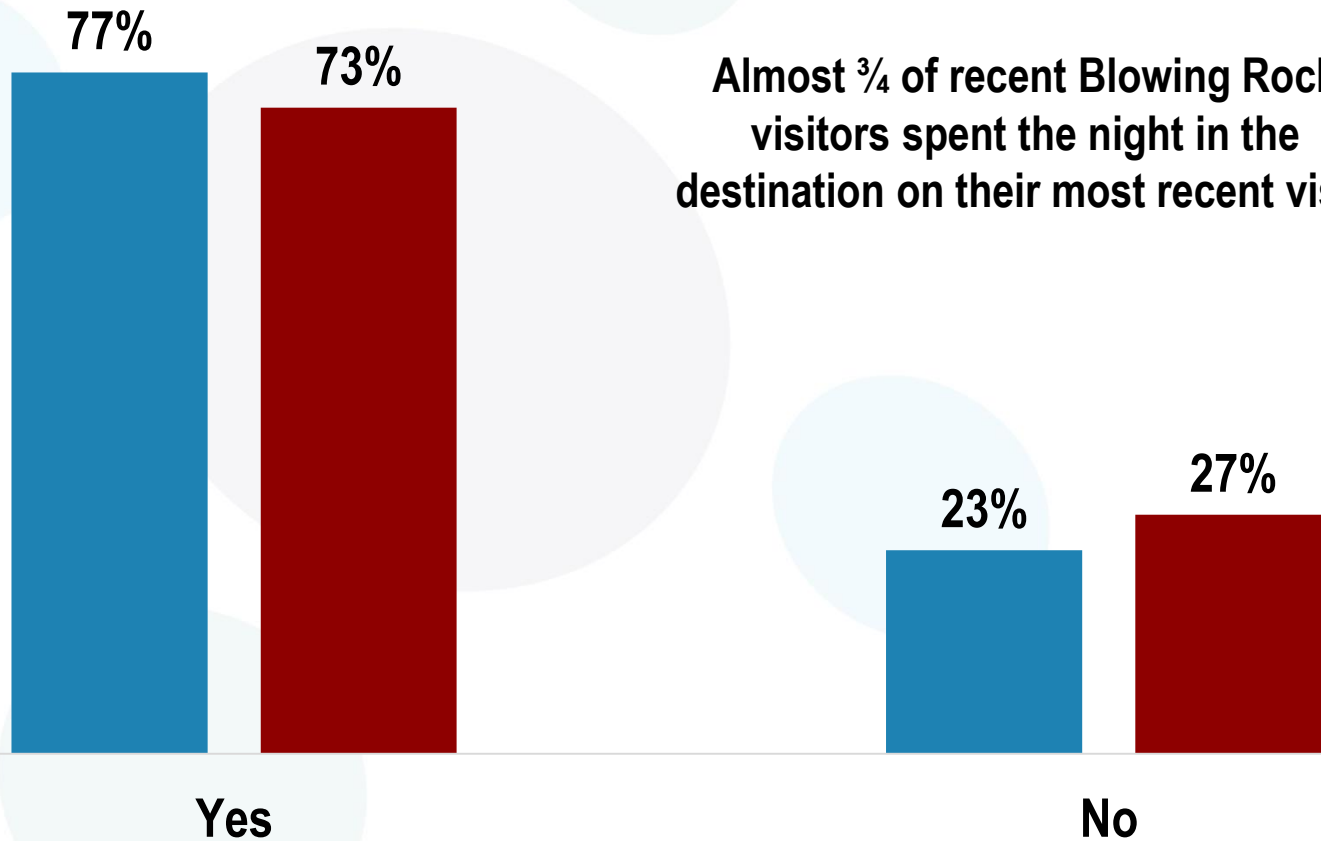


**This skew towards adults-only in the 2018 respondent database is also reflected in the smaller average visit party size.**

# Most Recent Visit to Blowing Rock – Spent the Night

■ 2017 Panel

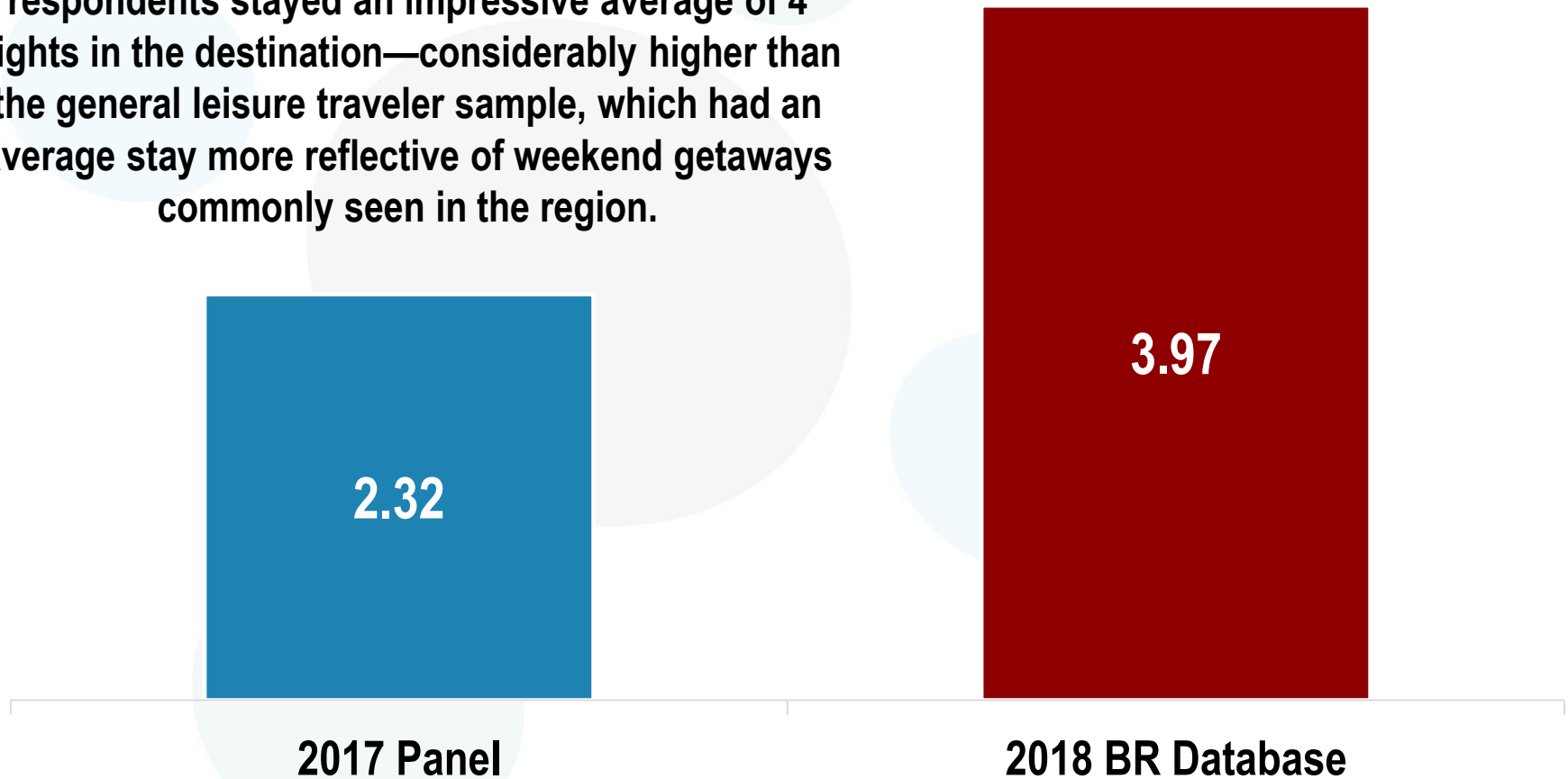
■ 2018 BR Database



Almost  $\frac{3}{4}$  of recent Blowing Rock visitors spent the night in the destination on their most recent visit.

# Most Recent Visit to Blowing Rock – Average Number of Nights

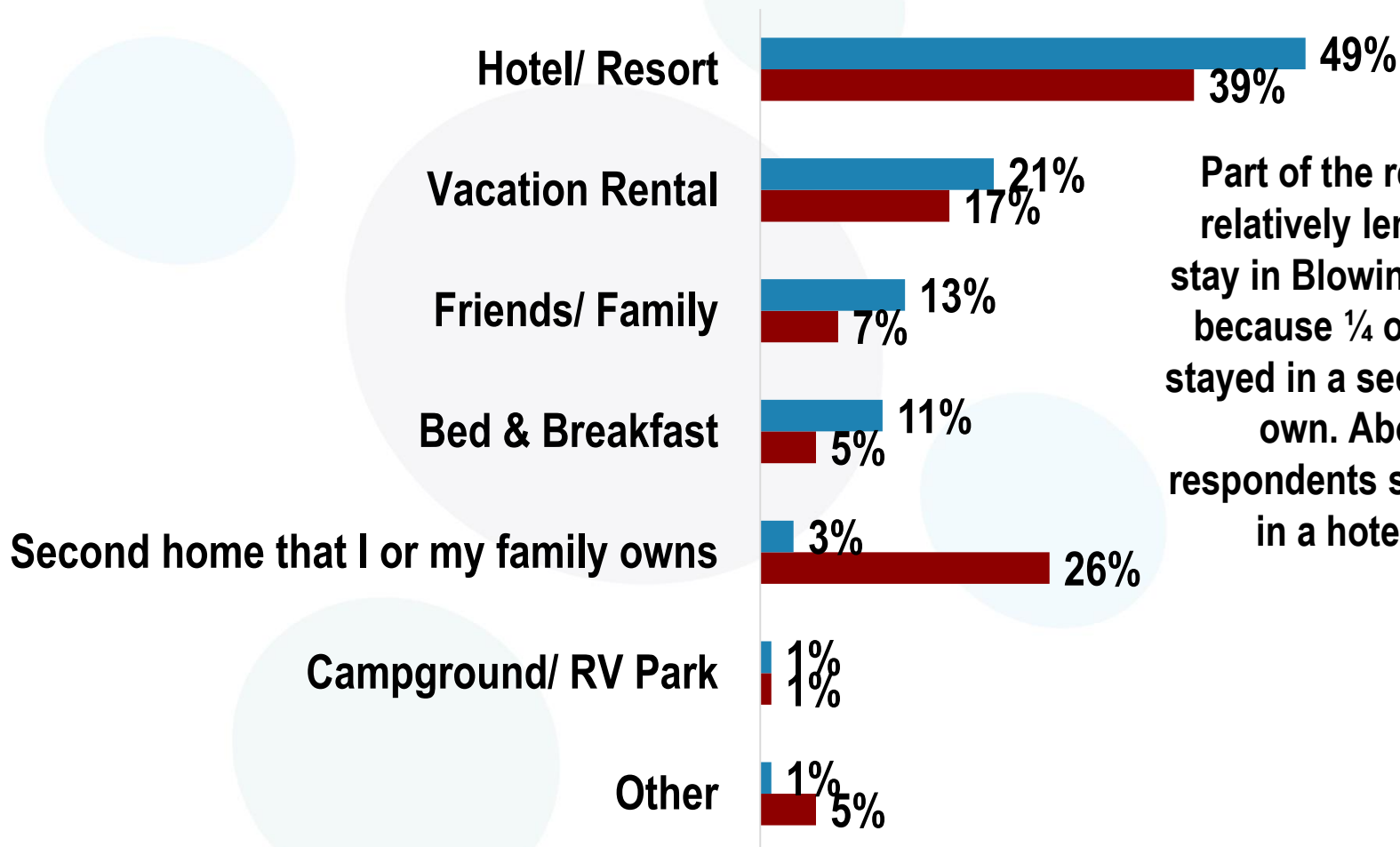
Among those visitors who spent the night in the area, Blowing Rock newsletter database respondents stayed an impressive average of 4 nights in the destination—considerably higher than the general leisure traveler sample, which had an average stay more reflective of weekend getaways commonly seen in the region.



# Most Recent Visit to Blowing Rock - Accommodations

■ 2017 Panel

■ 2018 BR Database

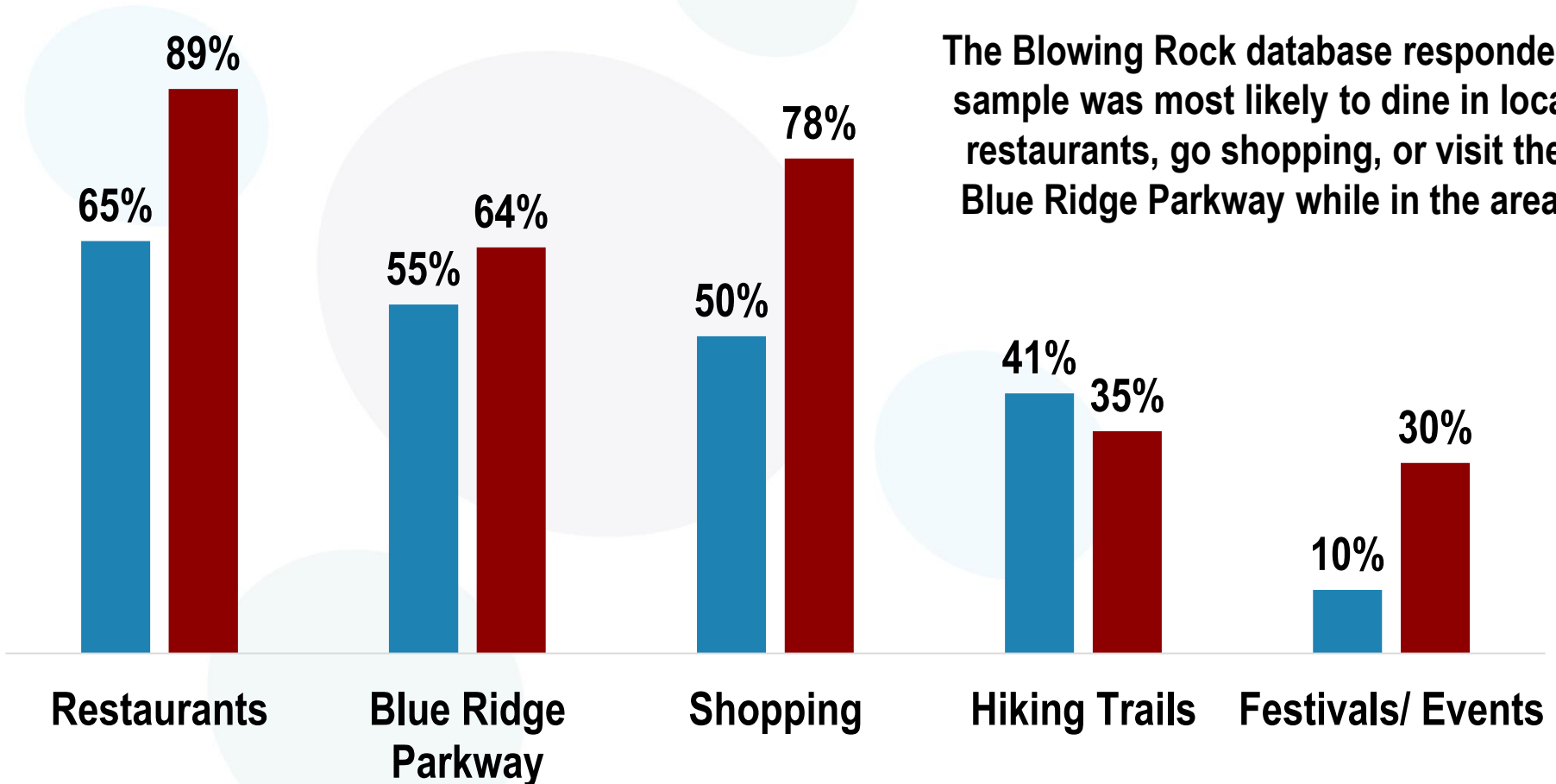


Part of the reason for that relatively lengthy average stay in Blowing Rock is likely because  $\frac{1}{4}$  of respondents stayed in a second home they own. About 4 of 10 respondents said they stayed in a hotel or resort.



# Most Recent Visit to Blowing Rock – Top Activity Participation While Visiting

■ 2017 Panel      ■ 2018 BR Database

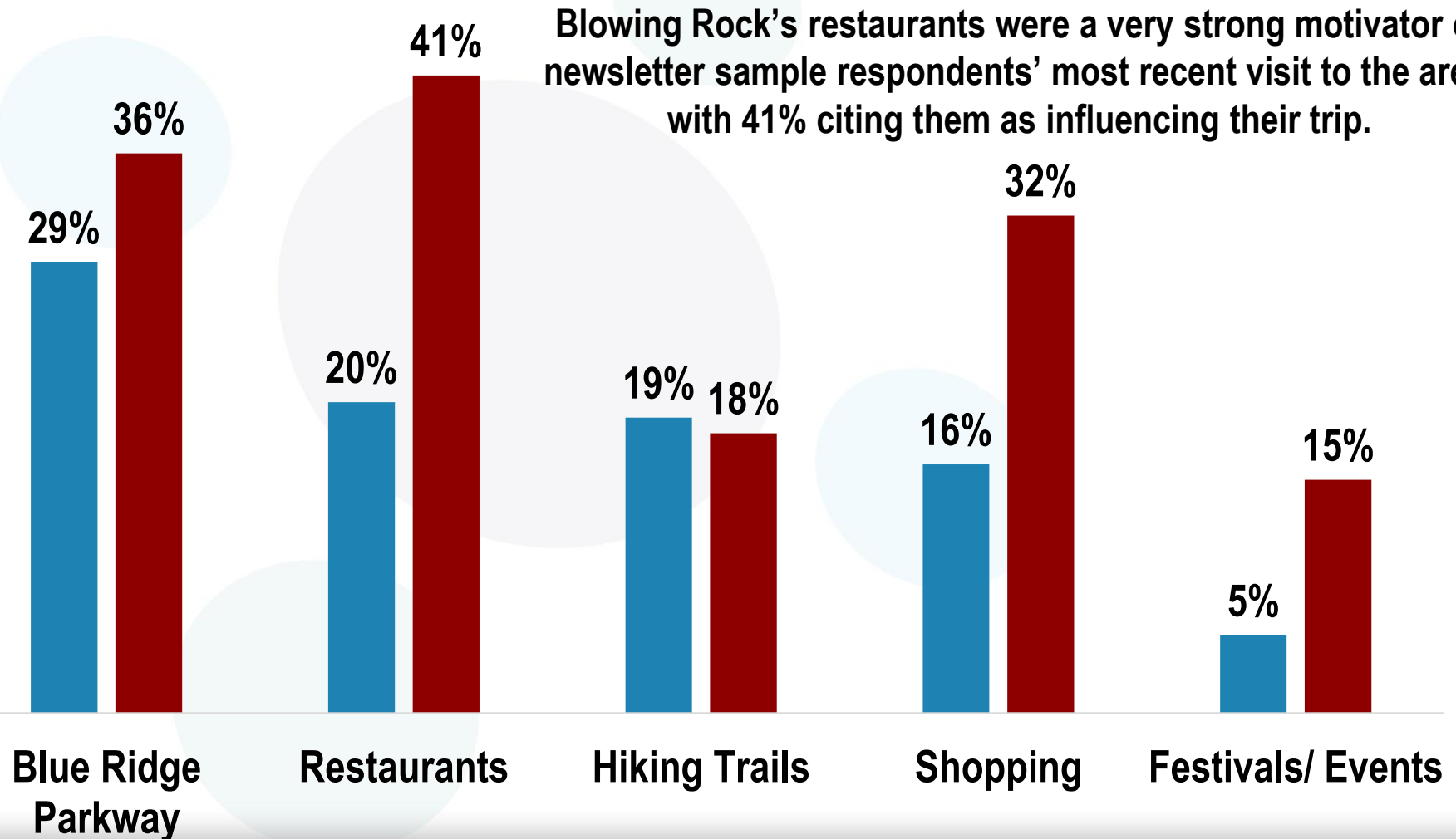


The Blowing Rock database respondent sample was most likely to dine in local restaurants, go shopping, or visit the Blue Ridge Parkway while in the area.

# Most Recent Visit to Blowing Rock – Top Activity Motivation for Visiting

■ 2017 Panel ■ 2018 BR Database

Blowing Rock's restaurants were a very strong motivator of newsletter sample respondents' most recent visit to the area, with 41% citing them as influencing their trip.



## 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?”



Net Promoter Score = (% Who are Promoters) – (% Who are Detractors)

Developed by Satmetrix, Bain & Company, and Fred Reichheld in The Ultimate Question

# Net Promoter Score--How likely would you be to recommend visiting Blowing Rock to your friends and family?

■ 2017 Panel ■ 2018 BR Database

92%



55%



Respondents from Blowing Rock's database are wildly enthusiastic about the destination. While the general leisure traveler sample was also relatively very positive about the area, the newsletter sample are strong advocates for it.

34%



7%



11%



1%



91%



43%



Promoters (rated 9 or 10)

Neutrals (rated 7 or 8)

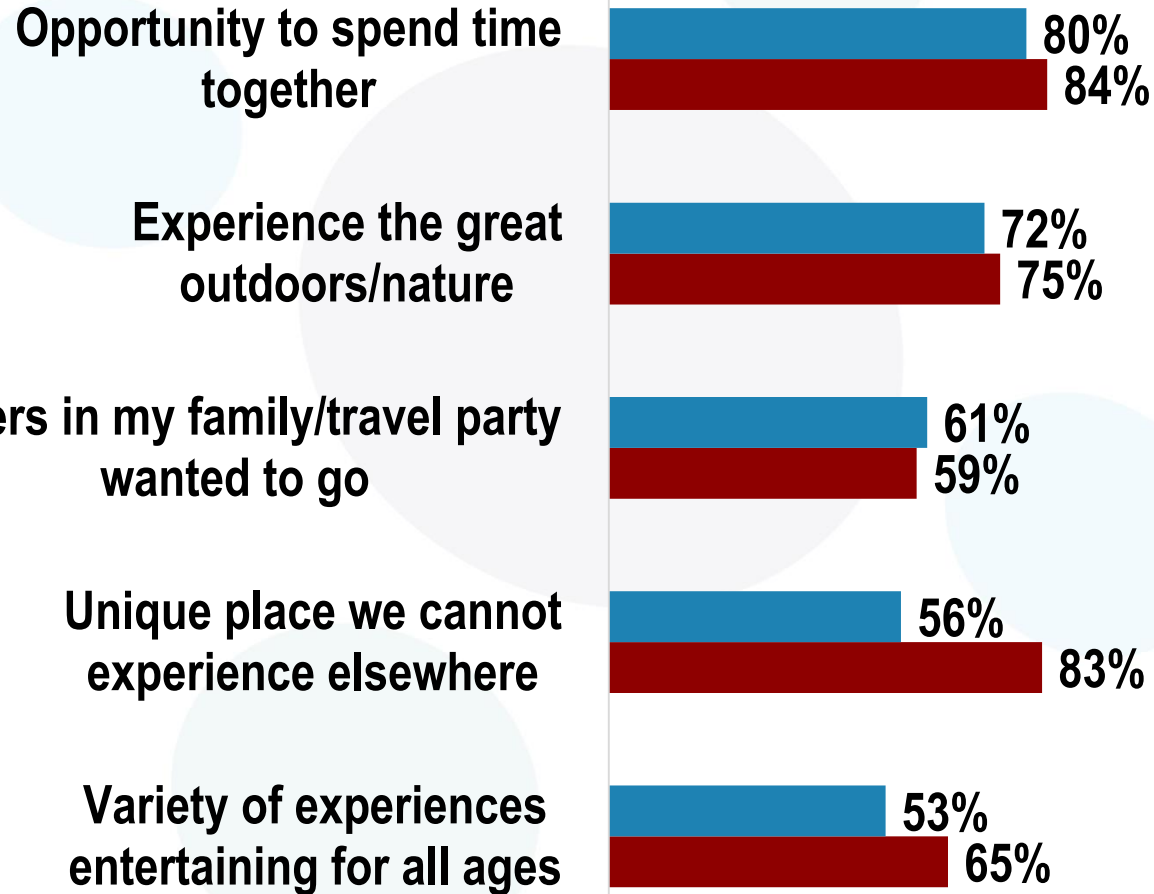
Detractors (rated 0 - 6)

NET PROMOTER SCORE  
(Promoters - Detractors)

# Most Recent Visit to Blowing Rock – Motivated/ Inspired Visit to Blowing Rock (1 of 2)

■ 2017 Panel

■ 2018 BR Database

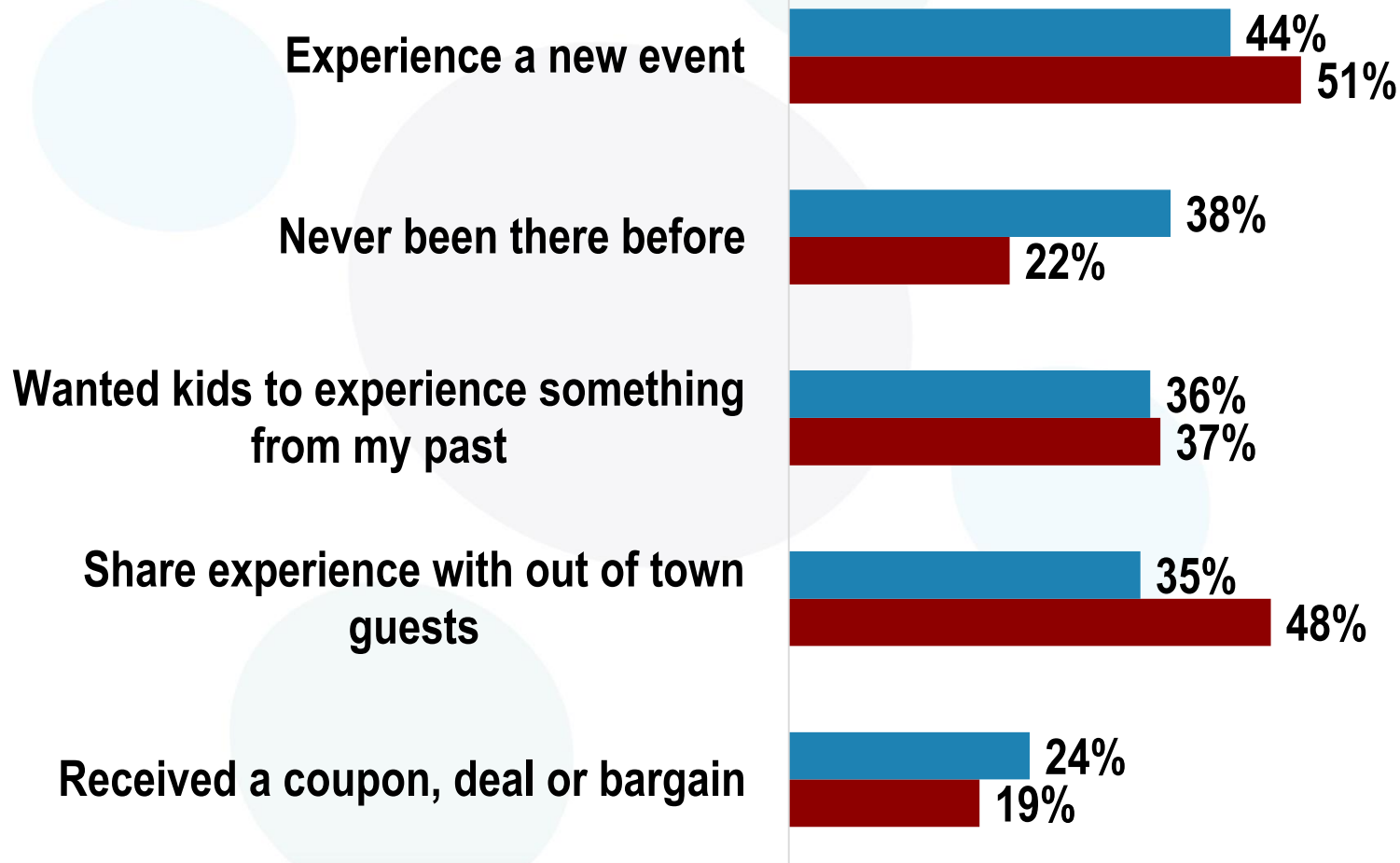


Respondents from the Blowing Rock database are primarily motivated to visit by the destination's uniqueness and its ability to bring people together in the great outdoors. Destination uniqueness was much higher as a motivator among this group than in the leisure traveler sample.

# Most Recent Visit to Blowing Rock – Motivated/ Inspired Visit to Blowing Rock (2 of 2)

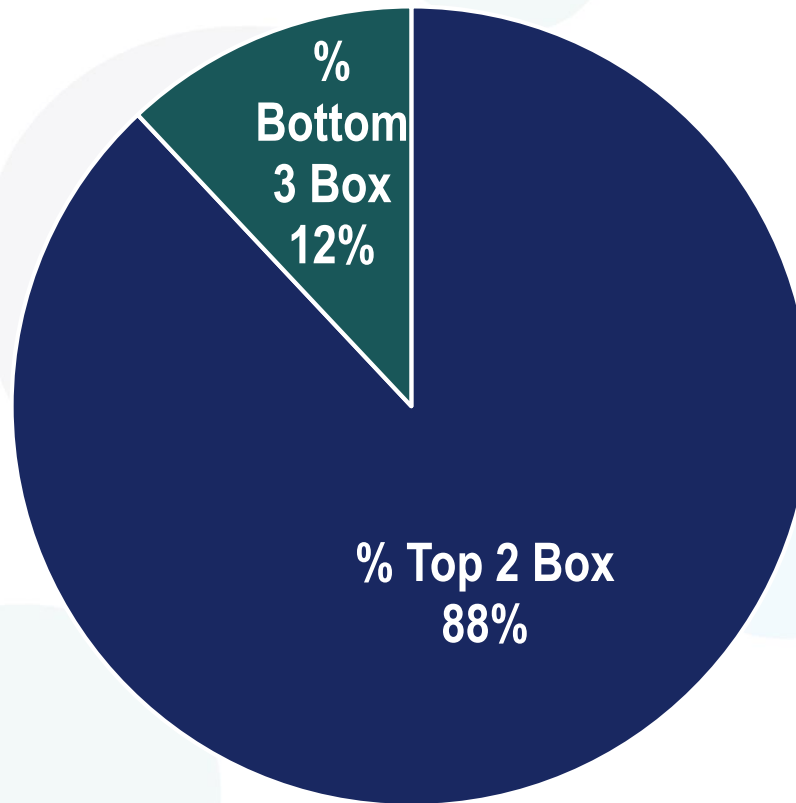
■ 2017 Panel

■ 2018 BR Database



# Most Recent Visit to Blowing Rock – Intent to Visit Blowing Rock in Next 12 Months

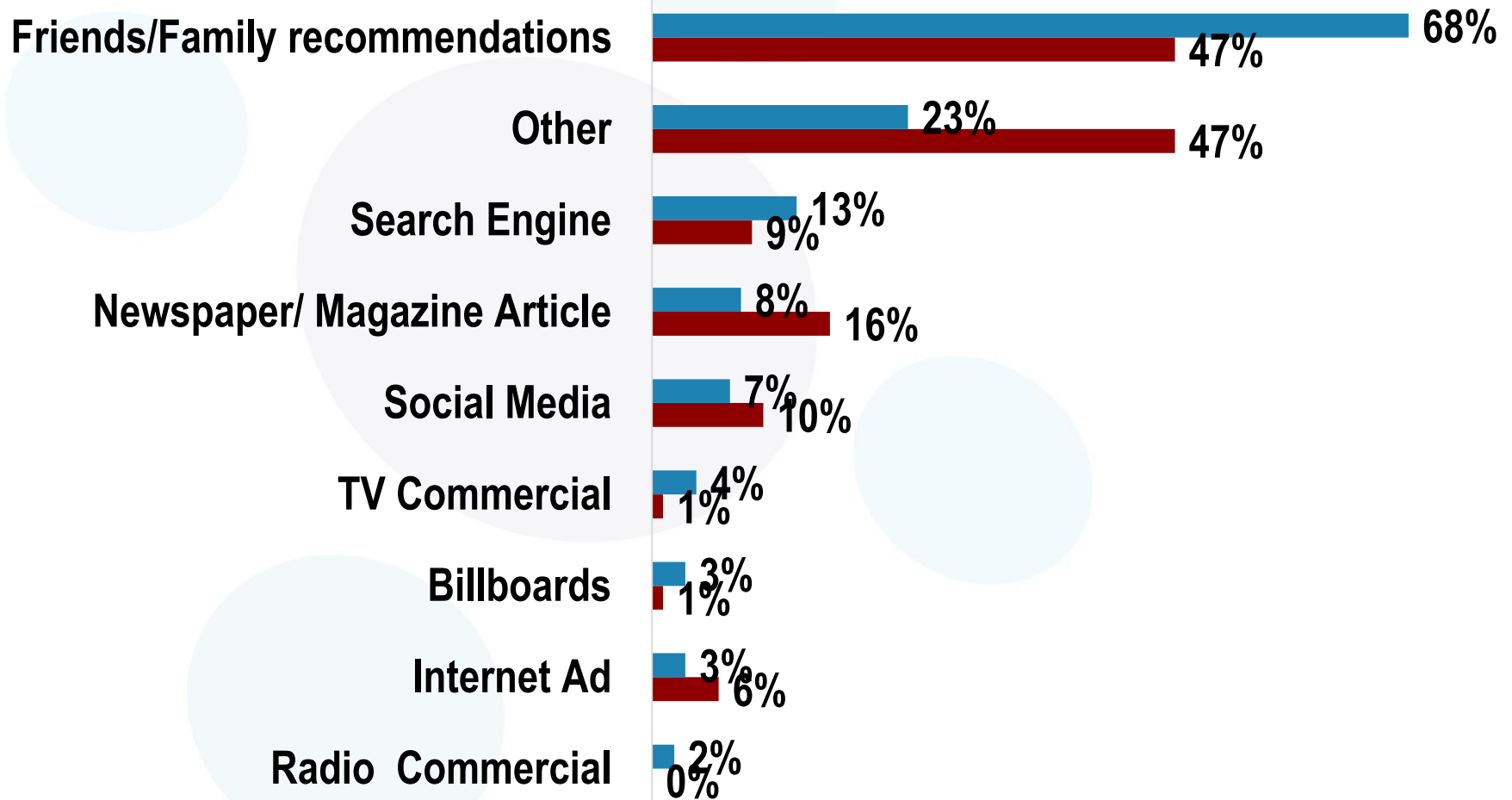
## 2018 BR Database



**Blowing Rock database visitors are highly motivated to visit again. 88% of them say is likely or very likely they will be back within the next 12 months.**

# How Did You Hear About Blowing Rock?

■ 2017 Panel ■ 2018 BR Database





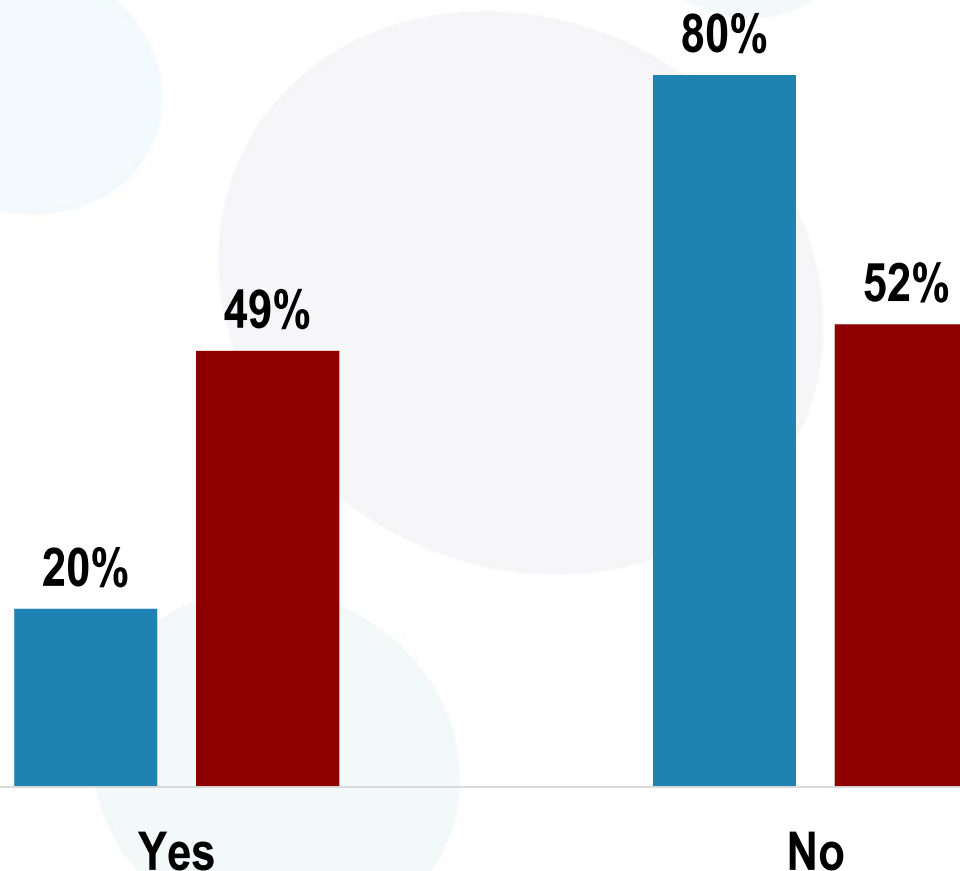
# How Did You Hear About Blowing Rock: *Other*

**Survey respondents who replied to the question about how they heard about Blowing Rock with “Other” cited the following most frequently (in order of mention):**

- 1. Always known about it and/or have been visiting for years**
- 2. Live in area seasonally or permanently, or have a home there**
- 3. Visited as a child**
- 4. Grew up in the area**
- 5. Appalachian State-related reasons**

# Visited the Blowing Rock Website Prior to Visit

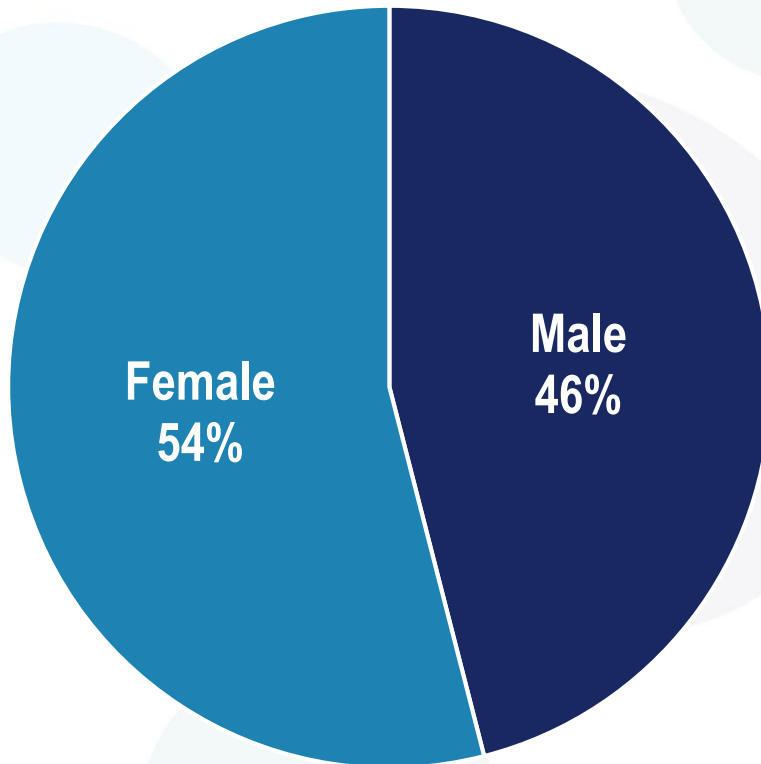
■ 2017 Panel      ■ 2018 BR Database



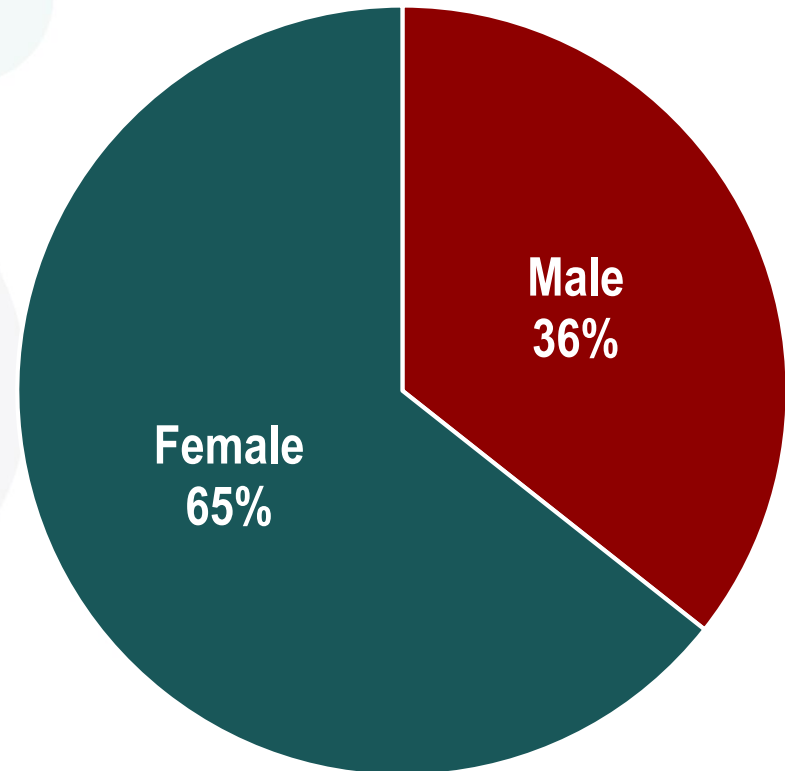
Given the origin of the database sample, the relatively high level of visitation to the Blowing Rock website prior to their most recent visit isn't surprising. However, this is a group that also appears to have a high level of existing awareness of the destination.

# Respondent Demographics - Gender

2017 Panel



2018 BR Database



**Two-thirds of the Blowing Rock database respondents are female, which is consistent with other industry research about the role of women as destination planners.**

# Respondent Demographics – Average Age

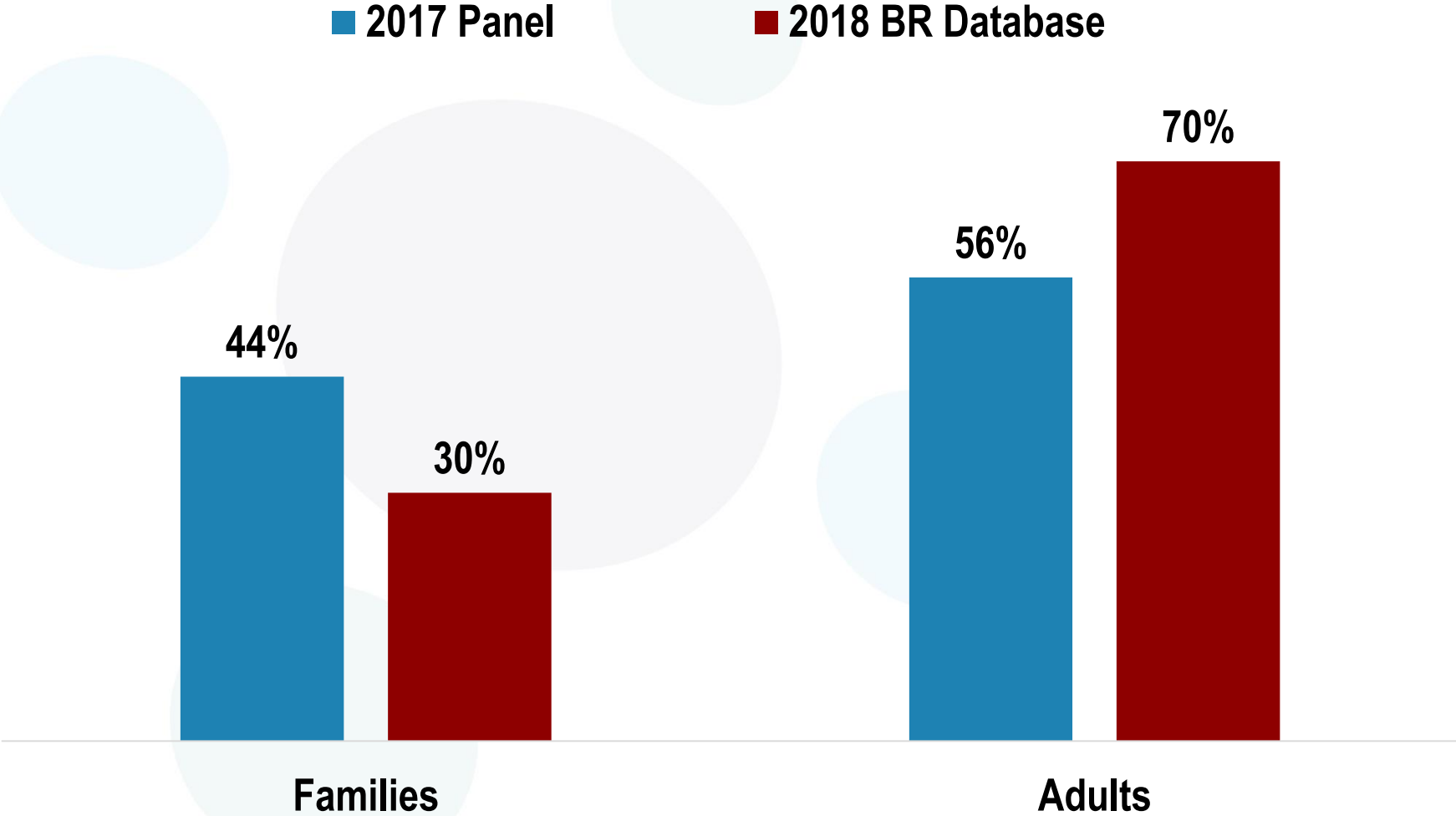
■ 2017 Panel      ■ 2018 BR Database

49.2

60.4

Age

# Respondent Demographics – Household Composition



# Respondent Demographics – Average Household Income

■ 2017 Panel

■ 2018 BR Database

\$135,006

\$128,028

Average Household Income

Remember that average household income may not necessarily correspond to net worth. An older, even retired, respondent like those in the Blowing Rock database may have a lower household income but substantial net worth.

# Respondent Demographics – Average Distance from Blowing Rock

■ 2017 Panel      ■ 2018 BR Database

170.8

220.4

Average Distance (Miles)

# Summary of Non-Visitor Responses from the Blowing Rock Database Survey

- **Of the 406 responses received for the Blowing Rock database survey, only 49 had not ever visited the destination. This result means that the group of non-visitor responses is not statistically reliable and should only be used for directional purposes only.**
- **There are no dominant specific reasons why this group of respondents have not yet visited Blowing Rock (even though they subscribe to the newsletter). The two top reasons are that it is too far away and that the respondent has other places they would rather visit, but even these were cited by relatively few people (only 12% strongly agree with either statement as the reason they have not visited).**





# INSIGHTS AND IMPLICATIONS



# Insights and Implications

**The Blowing Rock e-newsletter database sample is characterized by a skew towards previous visitors to the area (versus non-visitors), older couples traveling without children, and those who have considerable experience with and knowledge of the area.**

**Even given their familiarity with the destination, there are some key insights to be gained from the survey results:**

- **Given the respondent sample's existing strong awareness of the area, marketing communication with the database (and other audiences that may be familiar with Blowing Rock, such as on social media) should be focused as much upon motivating repeat visits to and length of stay as much as driving first-time visitation.**

# Insights and Implications

- **Even the 2017 leisure traveler sample survey results showed that 43% of those respondents had ever visited Blowing Rock. However, 41% of those visitors visited 3+ years ago.**
- **These findings should motivate the creation of content that emphasizes showing what's new in the area and “insider” stories about Blowing Rock, of which even those familiar with the destination may not be aware.**
- **Database respondents who have been Blowing Rock visitors are more likely to stay longer, but they are also more likely not to have stayed in a hotel, resort, or vacation rental.**
- **These visitors are good for the local economy, but do not help the TDA's return on marketing investment via the occupancy tax.**

# Insights and Implications

- **The TDA needs to find ways in its marketing to encourage potential visitors to stay overnight in Blowing Rock, given the number of second home owners, daytrippers, and likely bleed of visitors to overnight destinations like Boone. It's not always enough simply to encourage "visitation" if the ROI doesn't benefit overnight lodging.**
- **Blowing Rock's culinary reputation continues to be a strong driver of visitation as a destination attribute for its core visitor. But travelers are also drawn to it for its uniqueness and ability to bring friends and family together in a beautiful setting. These represent the foundation of a powerful, emotionally compelling destination brand positioning.**

# Insights and Implications

- **There is also a strong tradition of visitation to Blowing Rock that goes back generations, and is similar to that found in many beach destinations. While perhaps not as emotionally resonant for travelers who have never visited the area, it does create a powerful base of repeat guests who can be leveraged as brand ambassadors.**
- **Blowing Rock's base of visitors (in both surveys) has also been shown to be very upscale. Their average household income is well over \$100,000, which supports high average daily rates for lodging and the development of unique and exclusive destination experiences.**