



2015 Brand Perception & Market Study Research



Prepared by



Project Overview

PURPOSE

To provide decision makers with a better understanding of the current brand image in the marketplace, and serve as a baseline from which to measure future perceptions.

TARGET AUDIENCE

Professionally managed panel of residents living 50-300 miles from Rutherford County (28139 zip code) excluding Asheville, and an inquiry house list provided by the TDA. Respondents screened to ensure they have traveled for leisure, had visited the Lake Lure & the Blue Ridge Foothills area or were open to doing so, and are a travel destination decision maker in their household.

SAMPLE

A total of 683 respondents (600 from the professional panel and 83 from the TDA house list) were interviewed for this study, providing a maximum margin of error of +/-3.7% at a 95% confidence interval.

Competitive Landscape

- + *Top of Mind Weekend Getaways*
- + *Familiarity*
- + *Opinion of Destinations*
- + *Net Promoter Scores*
- + *Visitation & Consideration*
- + *Future Intent*
- + *Market Penetration*

01

Competitive KPIs*



78%

of regional travelers are familiar with the Lake Lure & the Blue Ridge Foothills area



73%

of those familiar with the Lake Lure & the Blue Ridge Foothills area say they have a positive opinion of the destination



36%

of regional travelers have visited the Lake Lure & the Blue Ridge Foothills area at some point



39%

of regional travelers say they intend to visit the Lake Lure & the Blue Ridge Foothills area in the next 12 months

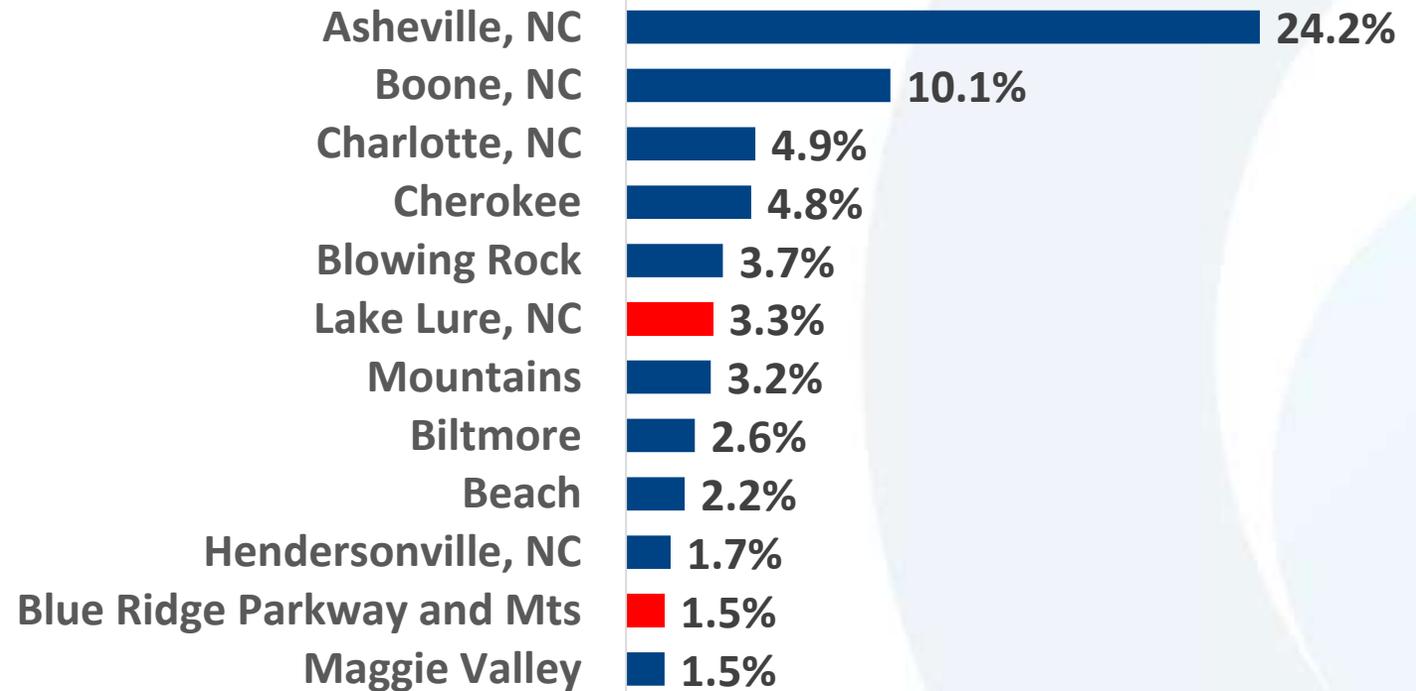
Top of Mind Weekend Getaways

The words “Lake Lure” & “Blue Ridge” were mentioned in the top 11 **unaided** responses; however, neither the full name nor Rutherford County was ever mentioned individually. **Lake Lure** was most recognizably mentioned (3.3%), followed by Blue Ridge Parkway/Blue Ridge Mountains (1.5%).

Unaided Getaways – Any Mention



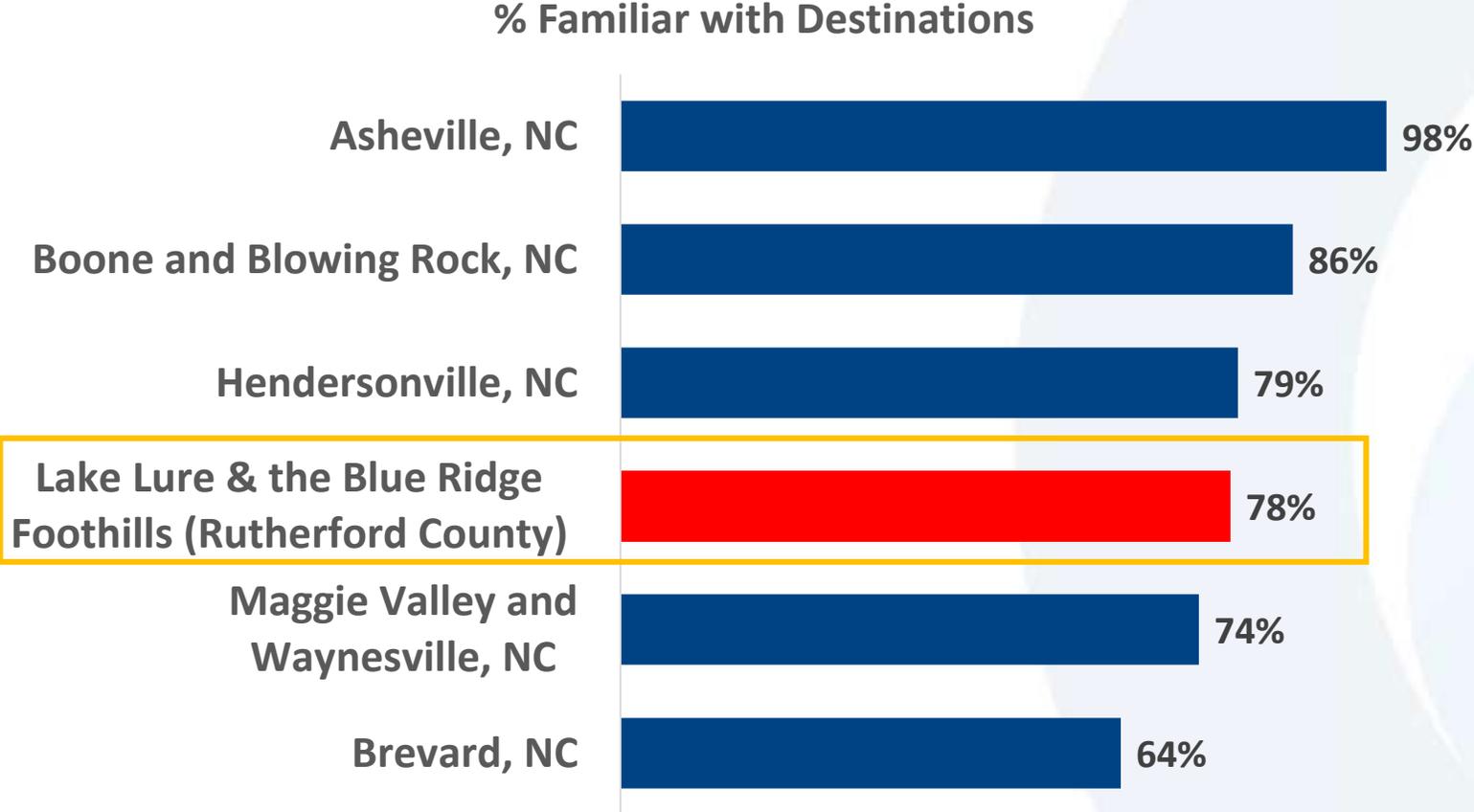
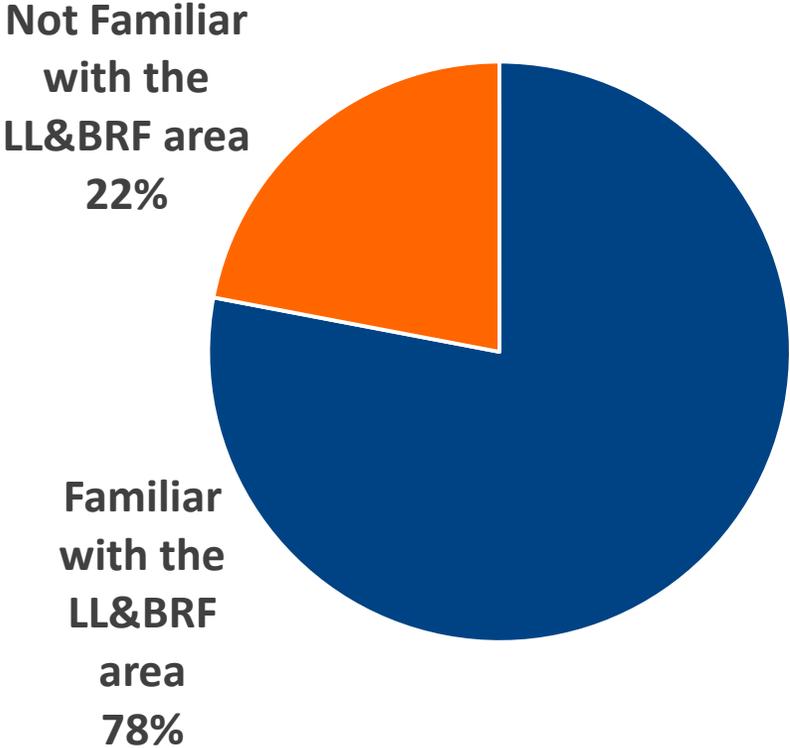
Any Mention of Destinations



Q4: When you think of overnight or weekend getaways in Western North Carolina, which destinations first come to mind?

Brand Familiarity

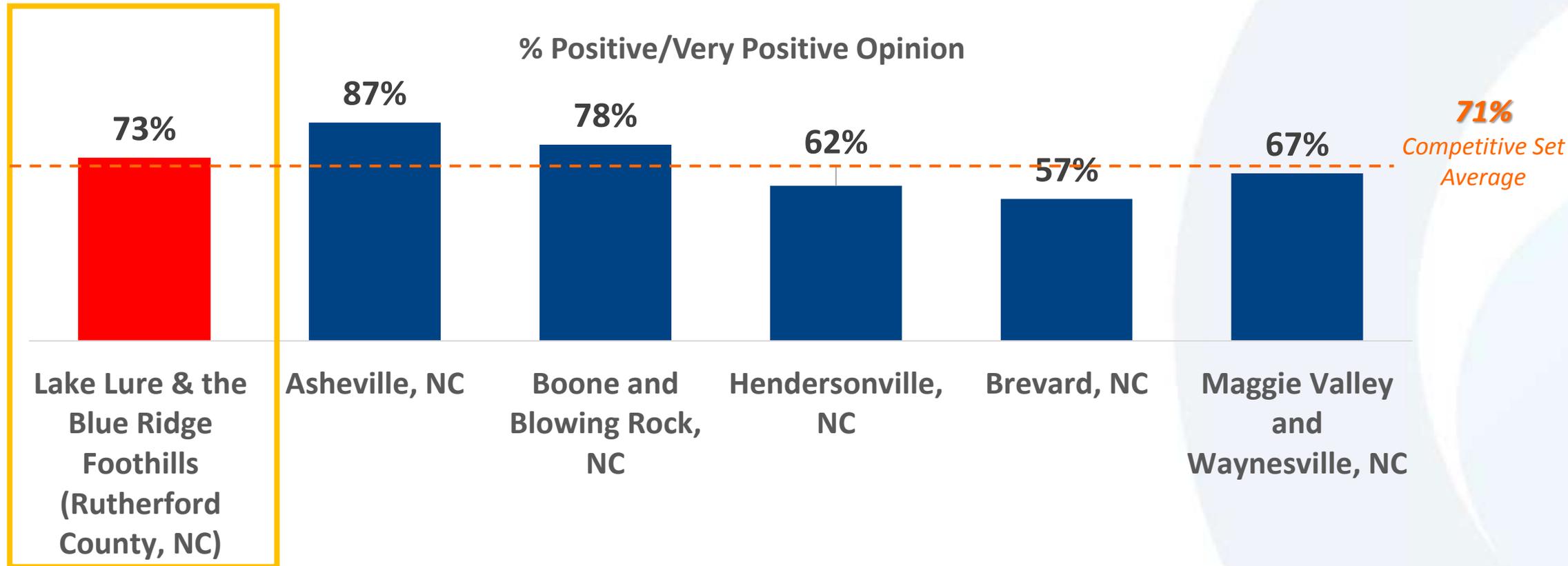
Similar to Hendersonville in **aided responses**, nearly 8 out of 10 area travelers indicated they were familiar with the Lake Lure & the Blue Ridge Foothills area.



Q6: Please indicate your awareness and prior visitation of the following area destinations for leisure purposes.

Opinion of Destinations

Travelers' opinion of the Lake Lure and the Blue Ridge Foothills area is higher than the competitive set average at a healthy 73%.



Q8: Using the scale provided, please indicate to what degree your opinion of these destinations is positive or negative.

Net Promoter Score

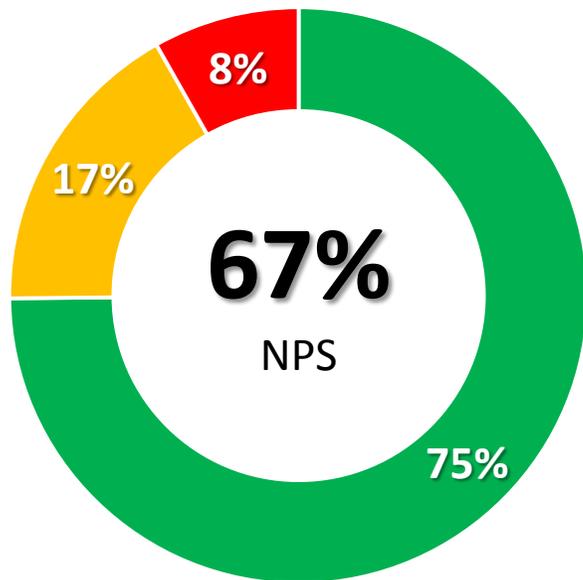
“How likely are you to recommend each of these destinations to a friend or family member?”



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

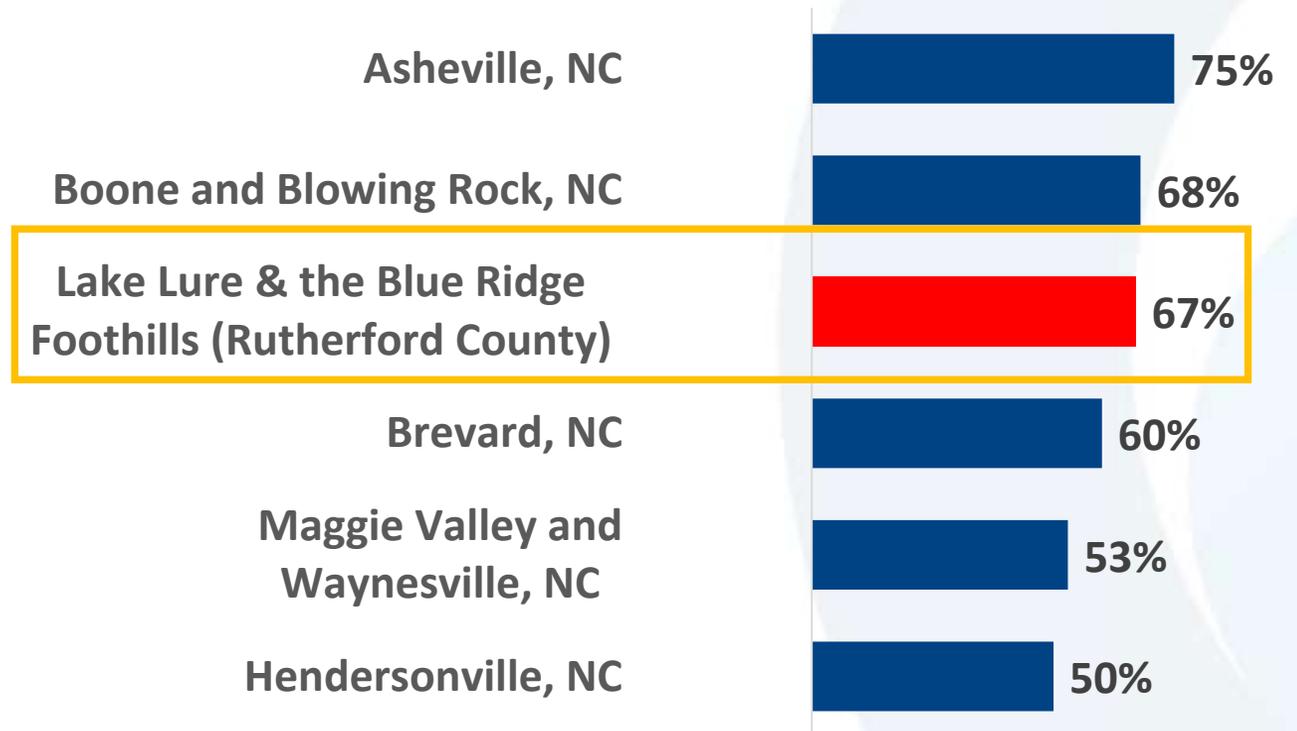
Net Promoter Score (NPS)

The Lake Lure & the Blue Ridge Foothills area earned a Net Promoter Score of 67% among visitors from the past 24 months—much higher than the H2R Industry Norm (33%).



- Promoters (9-10)
- Neutrals (7-8)
- Detractors (0-6)

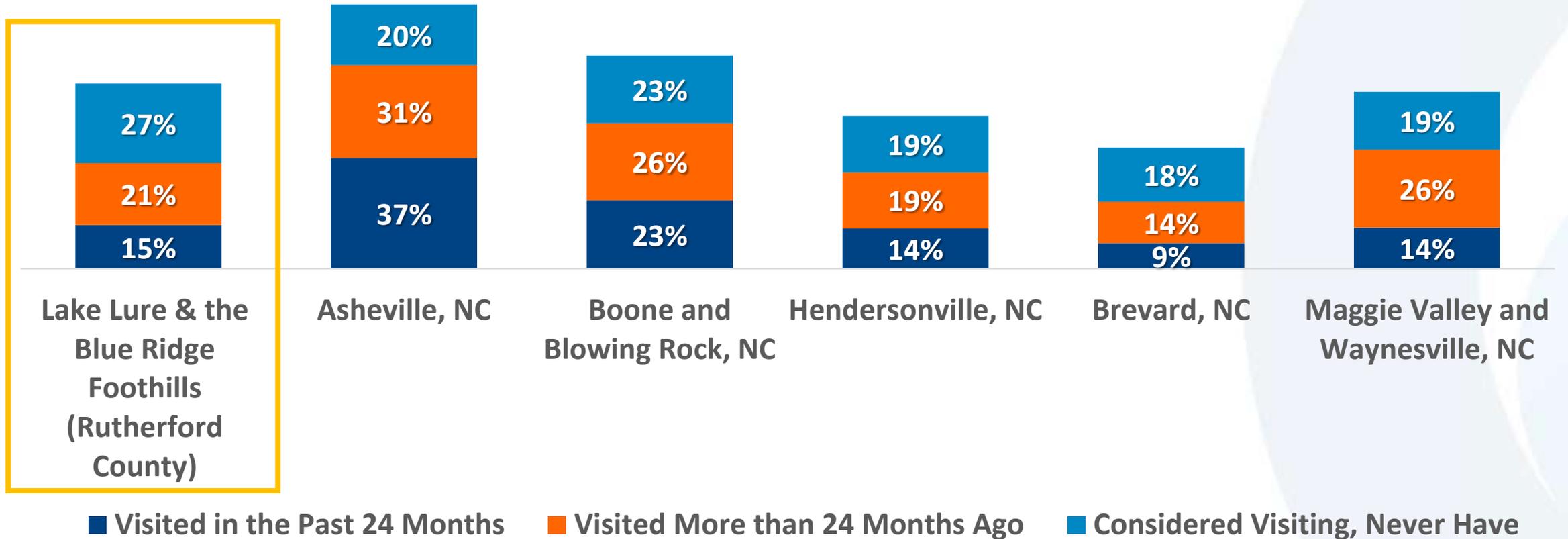
Competitive Set NPS



Q9: How likely would you be to recommend each of the following destinations as an overnight or weekend getaway destination to friends and family members?

Visitation to Destinations

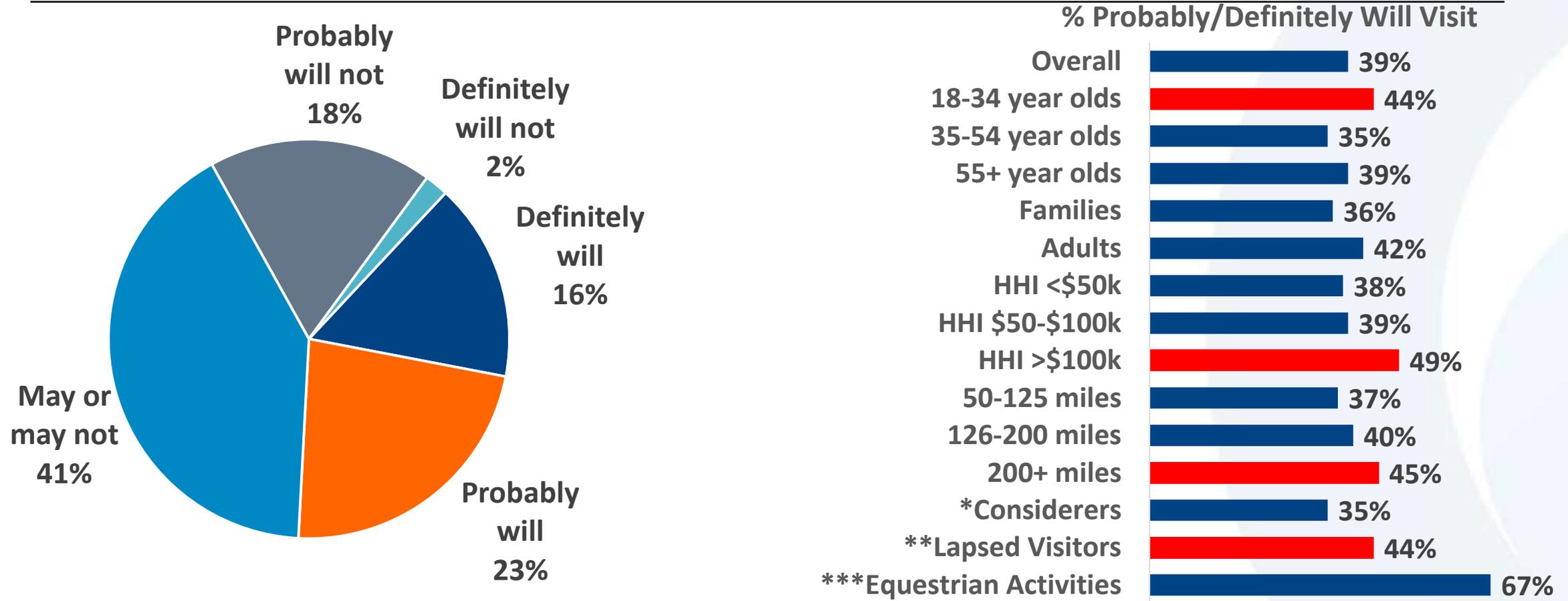
Lake Lure & the Blue Ridge Foothills area has a comparatively large percentage of prospects who have considered visiting (27%), but never have. However, LL&BRF fell slightly below the competitive set average for visited in the past 24 months and visited more than 24 months ago (19% and 23% respectively).



Q6: Please indicate your awareness and prior visitation of the following area destinations/regions for leisure purposes.

Intent to Visit the Lake Lure & the Blue Ridge Foothills Area

Overall, nearly 1 in 4 respondents indicated that they would be likely to visit the area in the next 12 months. Those most likely to visit participate in equestrian activities, have a HH income of more than \$100k, live more than 200 miles away and are Millennials.



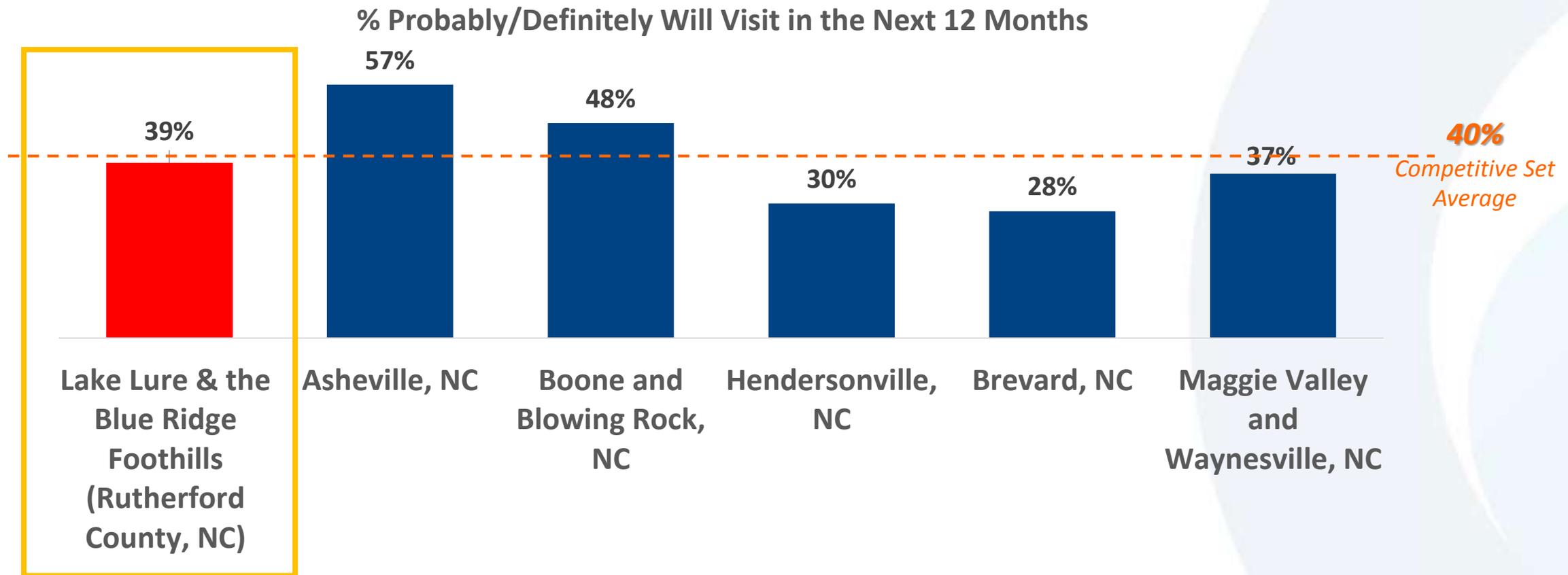
Q10: Using the scale provided, please indicate how likely you are to visit each of the following in the next 12 months.

*A Considerer is a traveler who has considered visiting the LL&BRF area, but has not.

**A Lapsed Visitor is a traveler who has visited the LL&BRF area, but not in the past 24 months.

Intent to Visit Destinations

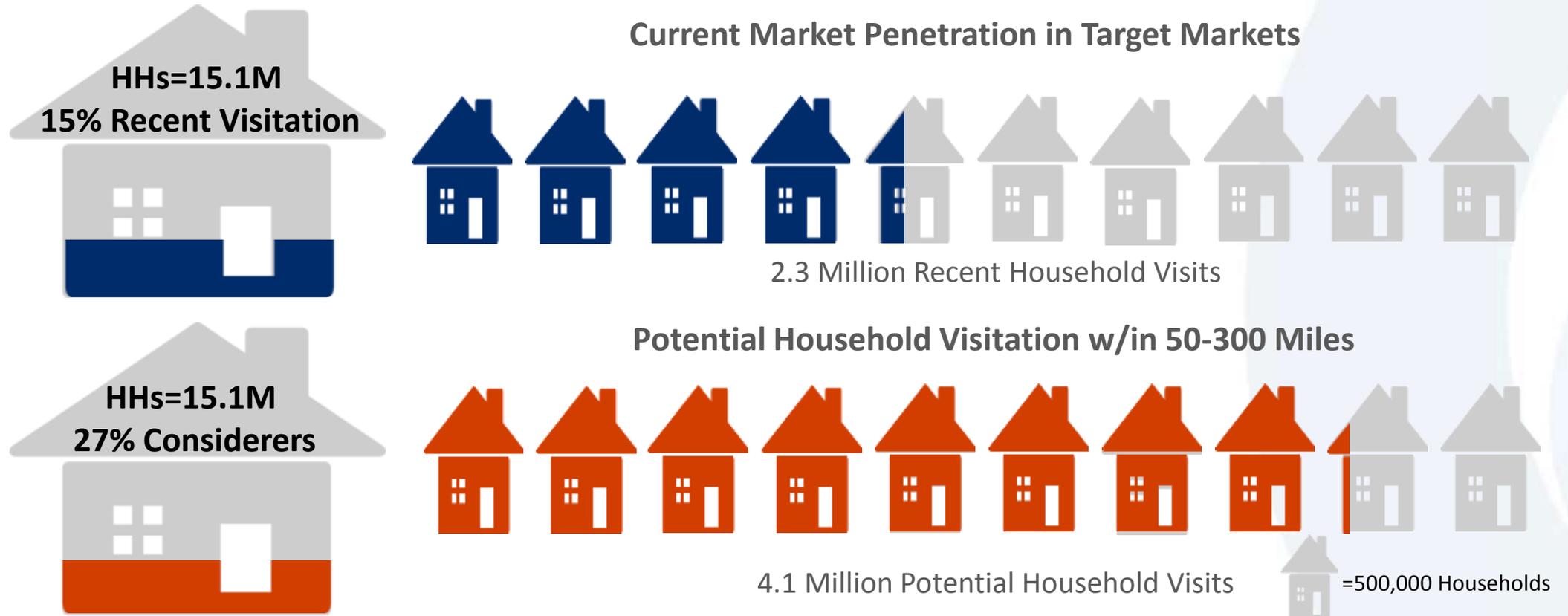
Intent to visit the Lake Lure & the Blue Ridge Foothills area in the next 12 months is slightly lower than the average for the competitive set at 39%; however, it is higher than Maggie Valley/Waynesville, Hendersonville, and Brevard.



Q10: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

Market Penetration

There are approximately **15.1 million** households within 50-300 miles of the Lake Lure & the Blue Ridge Foothills area. Approximately 2.3 million of these households have visited in the past 2 years. 4.1 million other travelers have considered visiting, along with 3.2 million travelers who are lapsed visitors.



Q6: Please indicate your awareness and prior visitation of the following area destinations/regions for leisure purposes.

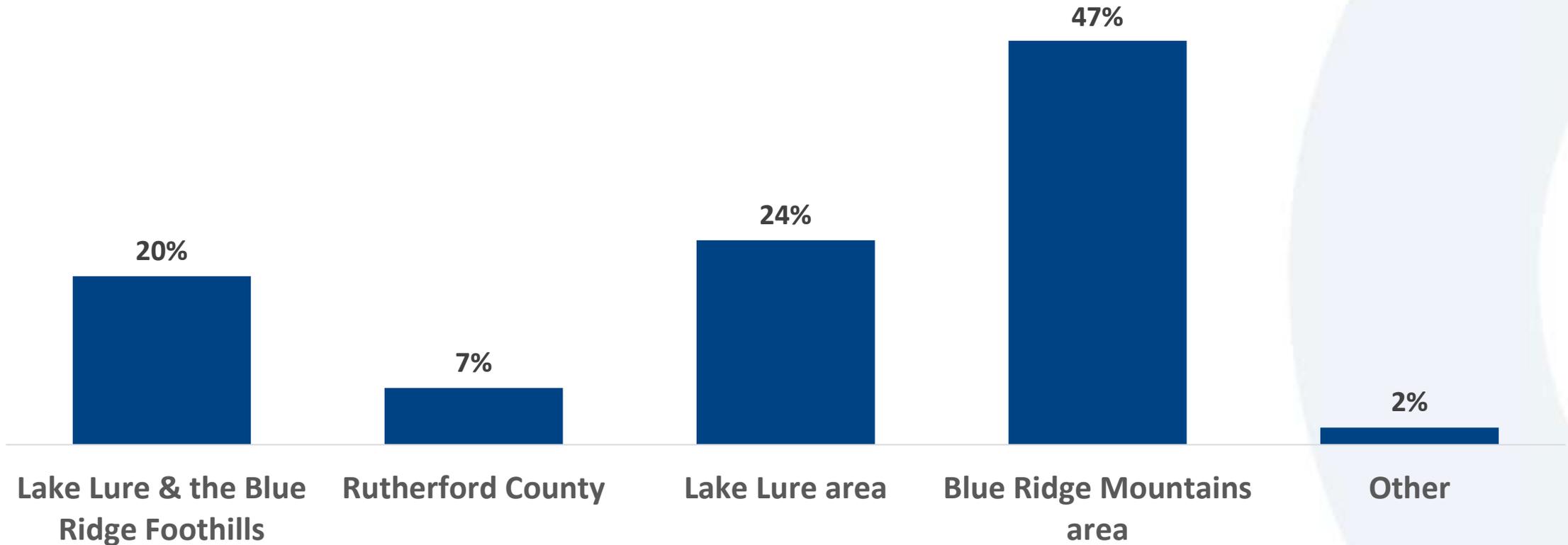
Brand Perception

- + *Brand Perception*
- + *Name Association*
- + *Brand Associations*
- + *Regular Outdoor Recreation Activities*
- + *Satisfaction*
- + *Brand Strengths & Unmet Needs*

02

Name Most Associated with the LL&BRF Area

Nearly half of those familiar with the Lake Lure & the Blue Ridge Foothills area most associate it with the name Blue Ridge Mountains area followed distantly by the name Lake Lure area (24%).



Q13: Which of the following names do you most associate with this area of Western North Carolina?

Brand Associations

Travelers most associate the area with outdoor and water activities as well as strolling down a small town street.

These images best depict the area because of its beautiful scenery and atmosphere that includes the mountains, lakes, and the great outdoors.

Beyond these top associations, travelers recognize the opportunity to spend quality family time with their loved ones in a relaxing, peaceful environment.



2% and Under

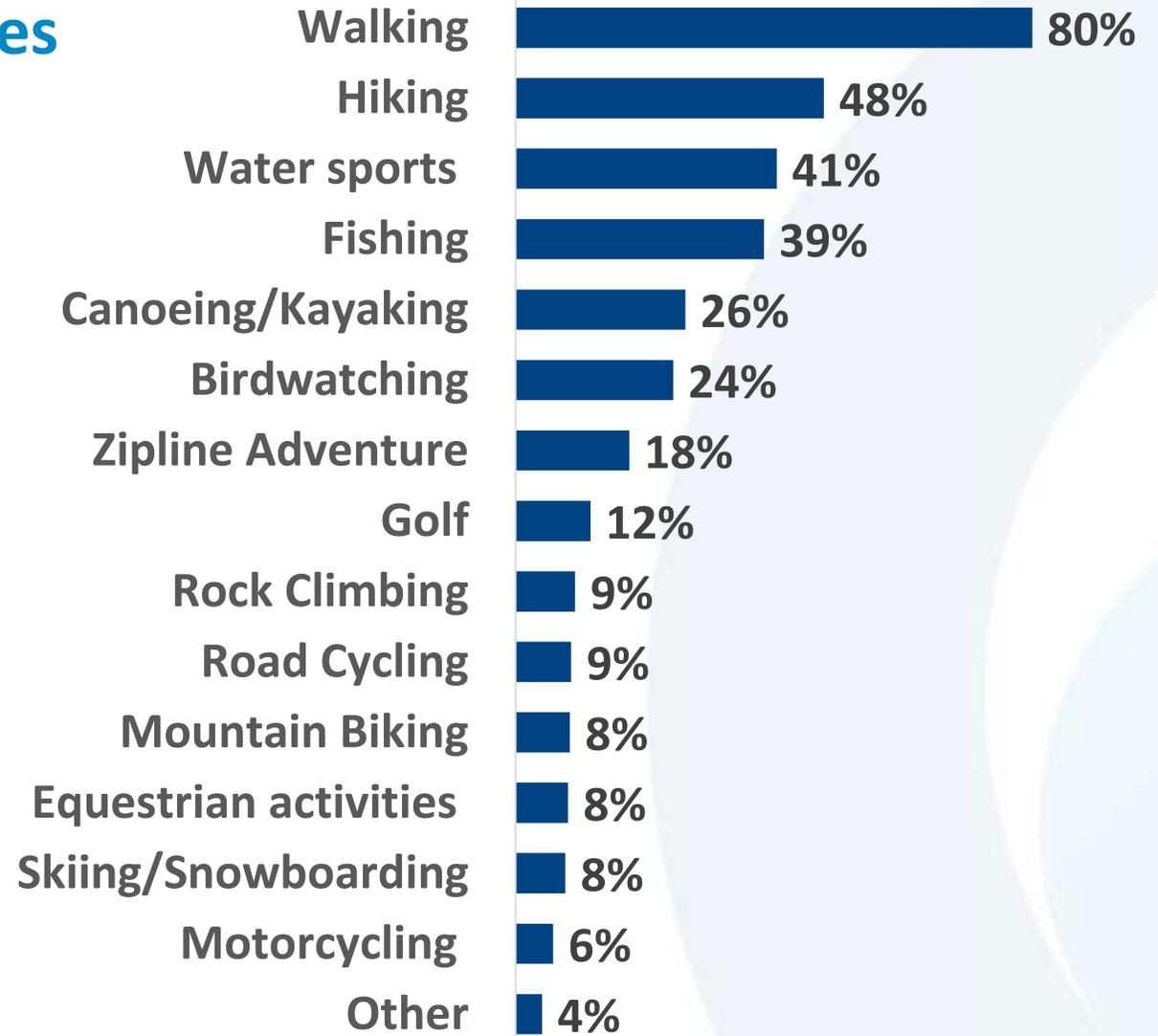


Q14: Please choose the image, if any, that you believe best embodies the personality of the Lake Lure & the Blue Ridge Foothills (Rutherford County, NC) area.

Q15: Why did you choose that image?

Regular Outdoor Recreation Activities

Walking is the most popular regular recreation activity regional travelers participate in, followed by hiking, water sports, and fishing.



Q16: What type of outdoor recreation activities do you enjoy (or participate in) regularly - within the last year?

Lake Lure & the Blue Ridge Foothills Area Satisfaction

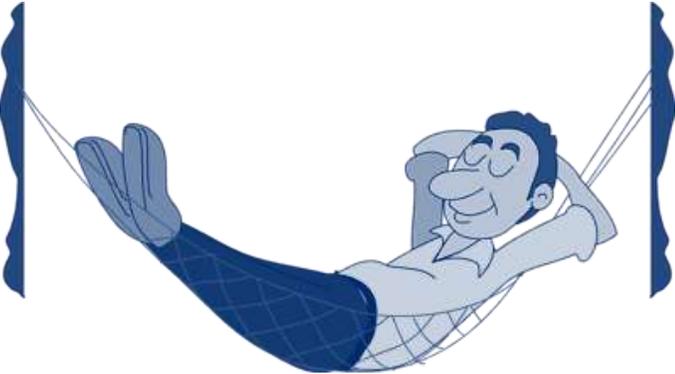
The Lake Lure & the Blue Ridge Foothills area visitors are highly satisfied with the beautiful scenery, ability to relax and unwind and the friendly local people. These scores topped 4.50 on a 5-point scale, considered excellent by industry standards.

Top Box Scores



84%

Beautiful Scenery



73%

Relaxing Place to Unwind



62%

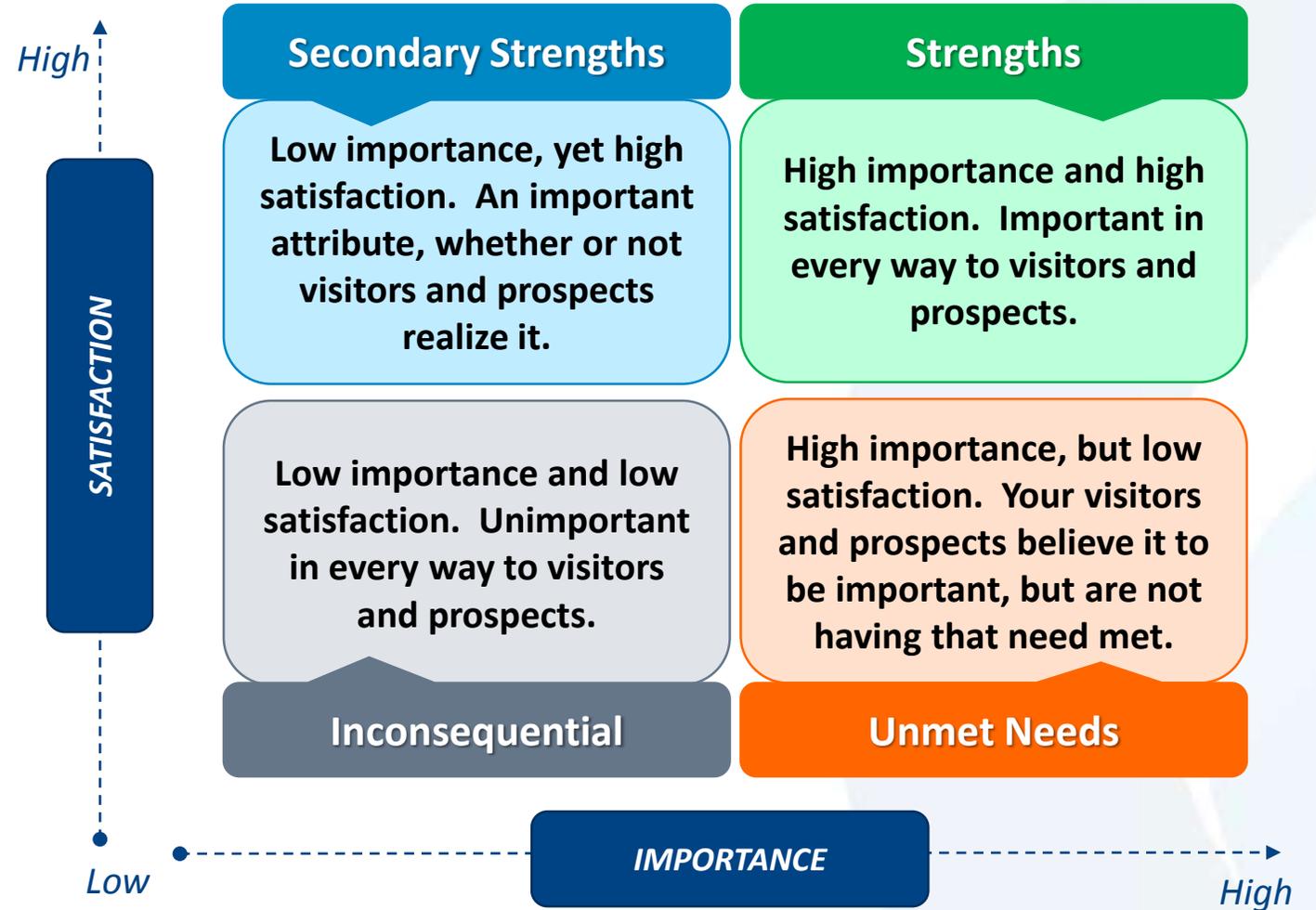
Friendly Local People

Q28: Using the scale provided, please rate how satisfied you were with following characteristics of the Lake Lure & the Blue Ridge Foothills (Rutherford Co.) area as a travel destination.

Identifying Brand Strengths & Unmet Needs

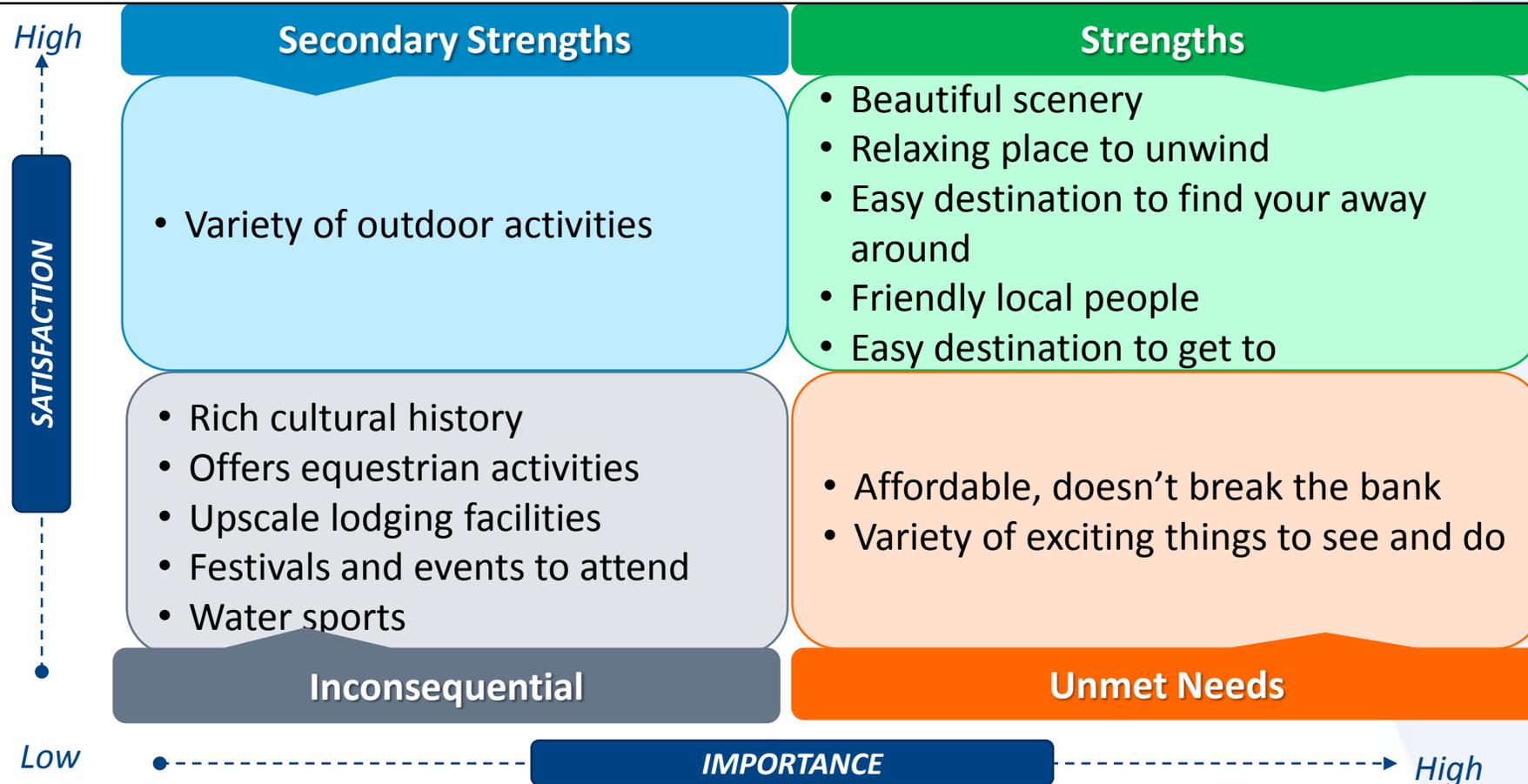
Each destination attribute is segmented into four buckets in the chart to the right. This analysis evaluates the relative importance of each element of the brand alongside visitors' satisfaction with each attribute as it relates to the Lake Lure & the Blue Ridge Foothills area.

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



Brand Strengths & Unmet Needs: LL&BRF

The area has numerous strengths that include beautiful scenery, relaxing place to unwind, easy to get to/around and friendly local people. There are two unmet needs that scored high in importance, but low in satisfaction that need to be addressed – affordability and variety of exciting things to see and do.

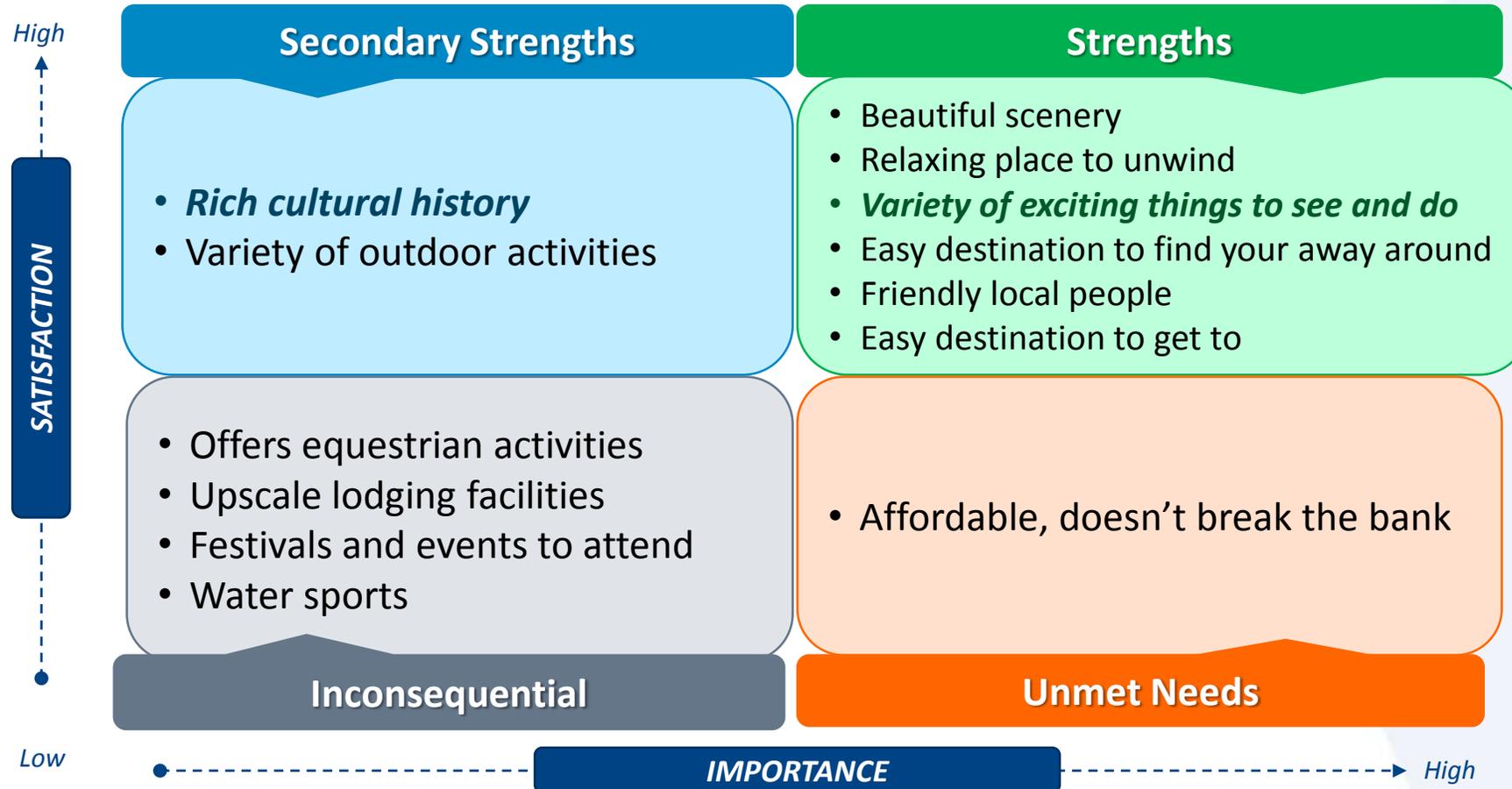


Q5: Using the scale provided, please indicate how desirable you find each of the following attributes or characteristics of overnight or weekend getaways you might consider.

Q28: Using the scale provided, please rate how satisfied you were with following characteristics of the Lake Lure & the Blue Ridge Foothills (Rutherford County) area as a travel destination.

Competitor Brand Strengths & Unmet Needs: Asheville

Asheville is most differentiated from Lake Lure & the Blue Ridge Foothills area by having variety of exciting things to see and do as a primary strength and rich cultural history as a secondary strength. All other categories are comparable.

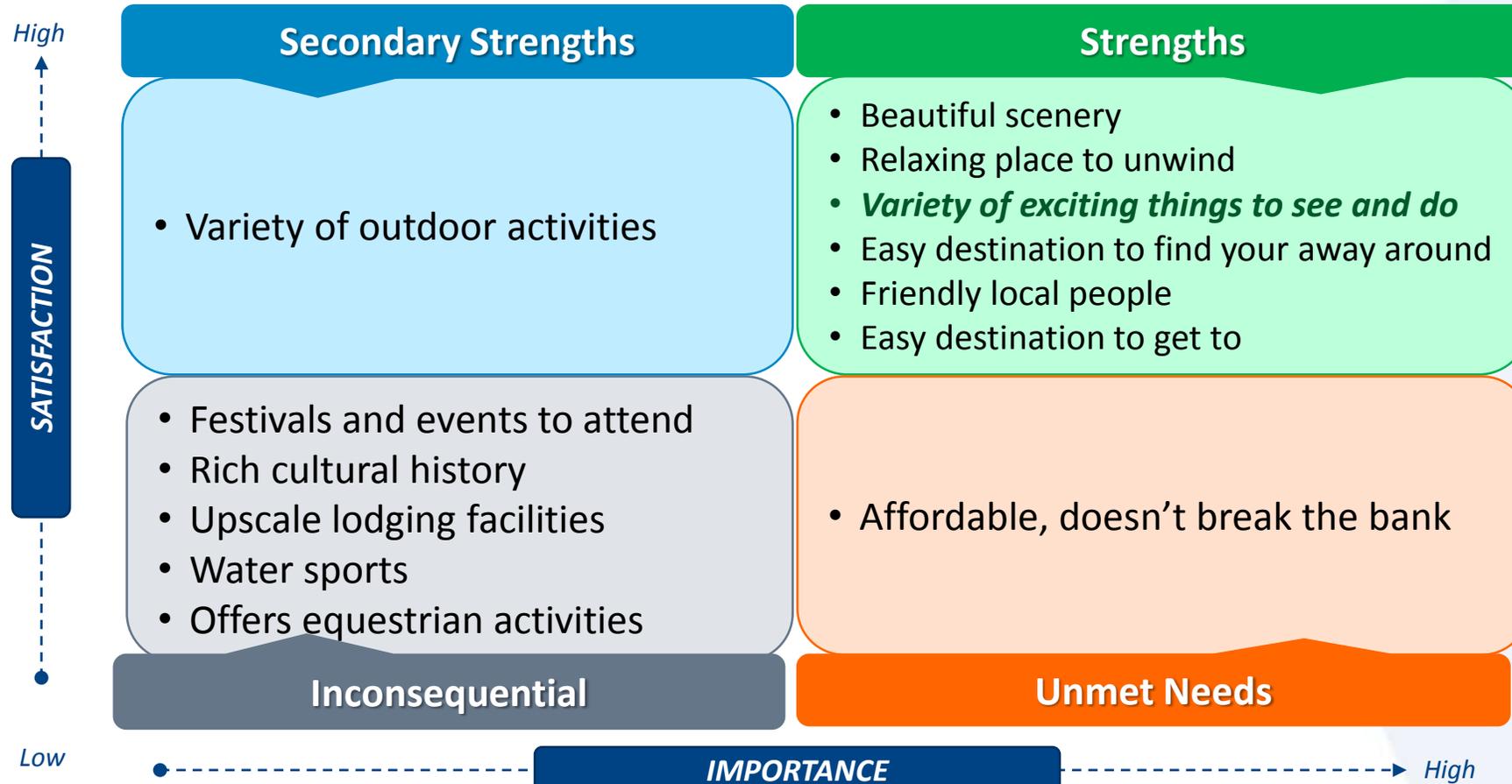


Q5: Using the scale provided, please indicate how desirable you find each of the following attributes or characteristics of overnight or weekend getaways you might consider.

Q28b: Using the scale provided, please rate how satisfied you were with following characteristics of the [most recent competitor] area as a travel destination.

Competitor Brand Strengths & Unmet Needs: Boone/Blowing Rock

Boone/Blowing Rock is most differentiated from Lake Lure & the Blue Ridge Foothills area by having variety of exciting things to see and do. Otherwise, the two destinations are very similar in their offerings.



Q5: Using the scale provided, please indicate how desirable you find each of the following attributes or characteristics of overnight or weekend getaways you might consider.

Q28b: Using the scale provided, please rate how satisfied you were with following characteristics of the [most recent competitor] area as a travel destination.

Visitor Behavior & Preferences

- + *Recent Visitation*
- + *Purpose of Visit*
- + *Emotional Drivers*
- + *Overnight Visitation*
- + *Areas of Visitation to the Region*
- + *Functional Drivers*

03

Primary Purpose of Visit

The majority of visitors indicated they traveled to the area for a vacation/getaway followed by visiting for a recreational day trip. The average visitor travels 150 miles to visit the area.



49%

Vacation/Getaway



25%

Recreational Day Trip



10%

Visit Friends/Family



7%

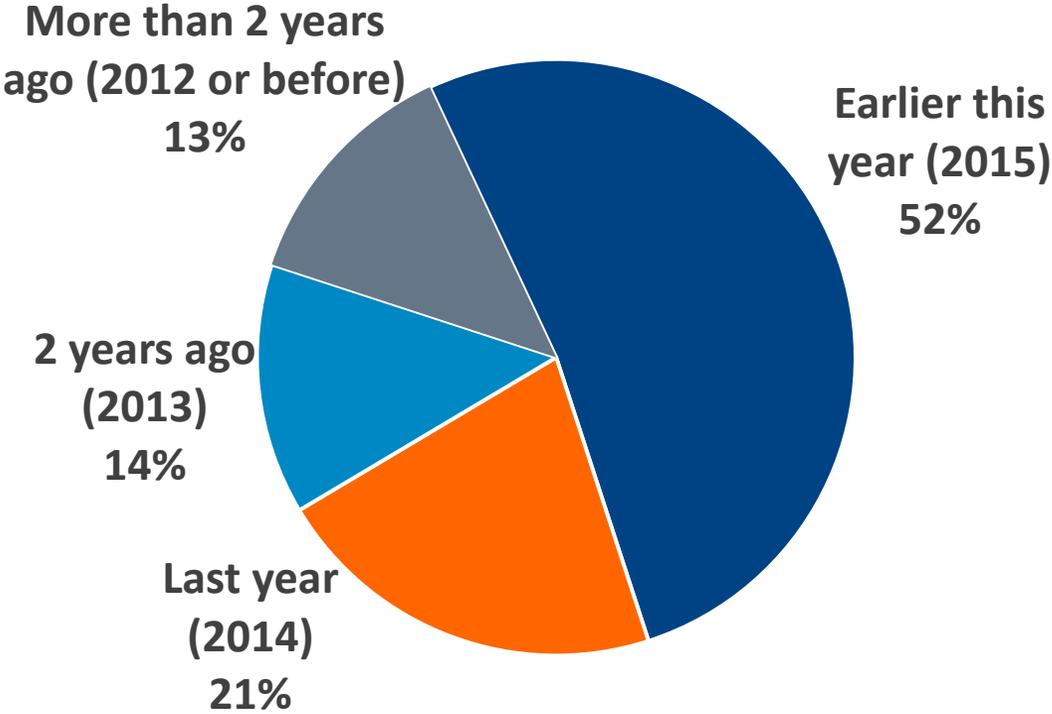
Passing Through

Q19: What was the primary purpose of your trip to the Lake Lure & the Blue Ridge Foothills (Rutherford County, NC) area on your most recent visit?

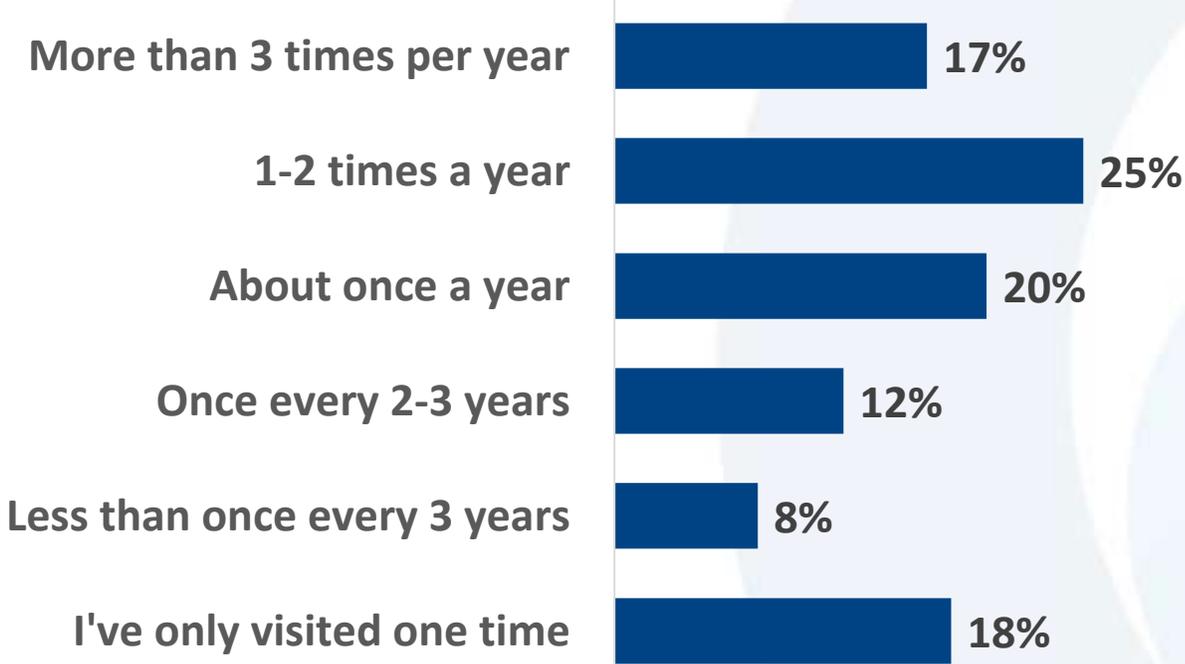
Most Recent Visit

Most of the visitation to the Lake Lure & the Blue Ridge Foothills area occurred in 2015 with nearly two-thirds of respondents visiting once a year or more.

Most Recent Visit



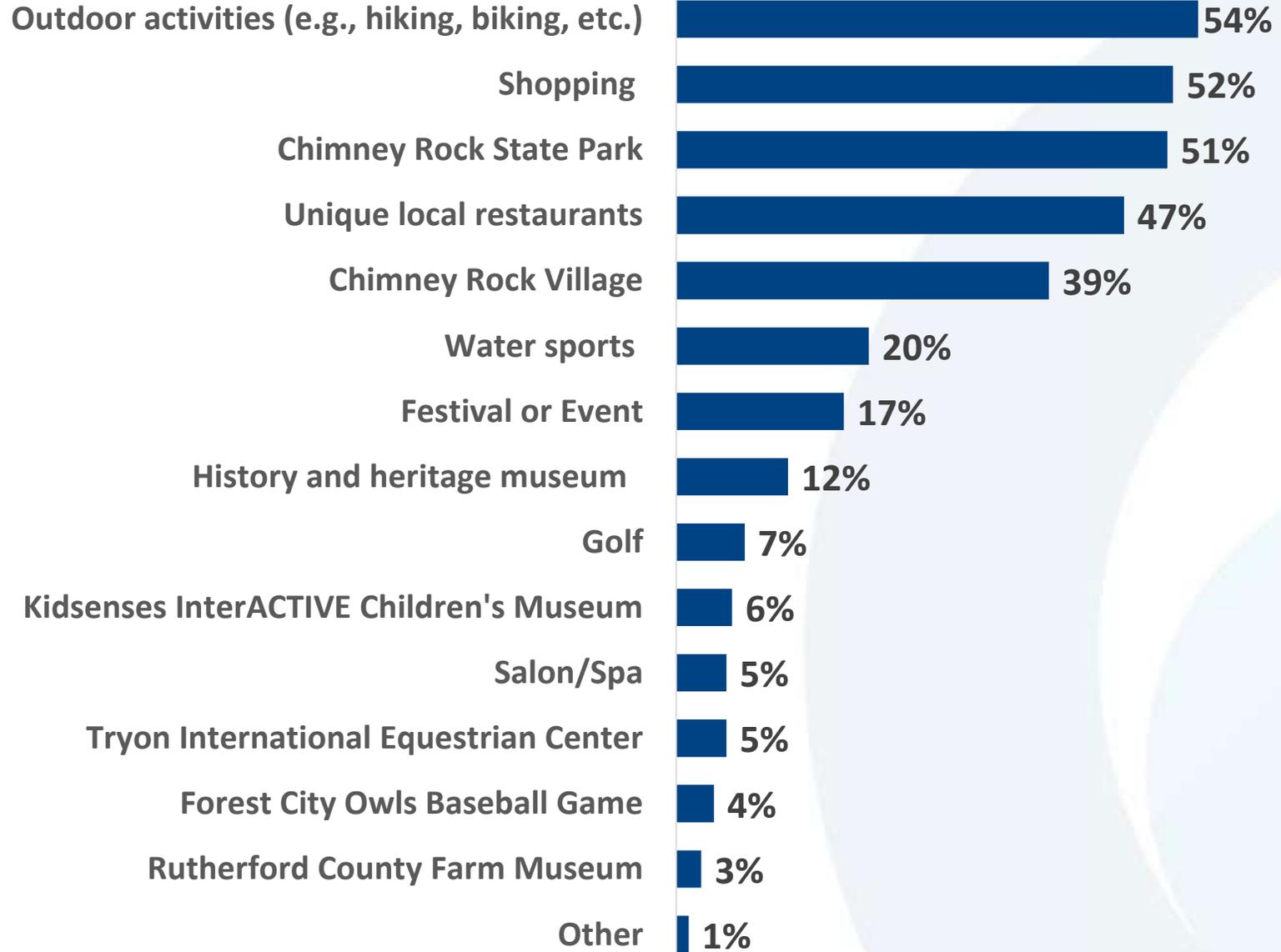
Frequency of Visitation



Q17: How often do you typically visit the Lake Lure & the Blue Ridge Foothills (Rutherford County) area?
Q18: When was your most recent visit to the Lake Lure & the Blue Ridge Foothills (Rutherford County) area?

Area Activity Participation

The most popular activities participated in by Lake Lure & the Blue Ridge Foothills visitors include outdoor activities, shopping, and Chimney Rock State Park.



Q26: Which of the following activities, if any, did you visit or participate in on your most recent visit to the Lake Lure & the Blue Ridge Foothills (Rutherford County) area?

Functional Drivers of Visitation

The most influential activities to drive visitation to the area are Chimney Rock State Park, Outdoor Activities, Chimney Rock Village, and Shopping. When specifically looking at those who spent the night in the Northwestern region, Shopping is replaced by Water Recreation.



39%

Chimney Rock State Park



37%

Outdoor Activities



18%

Chimney Rock Village



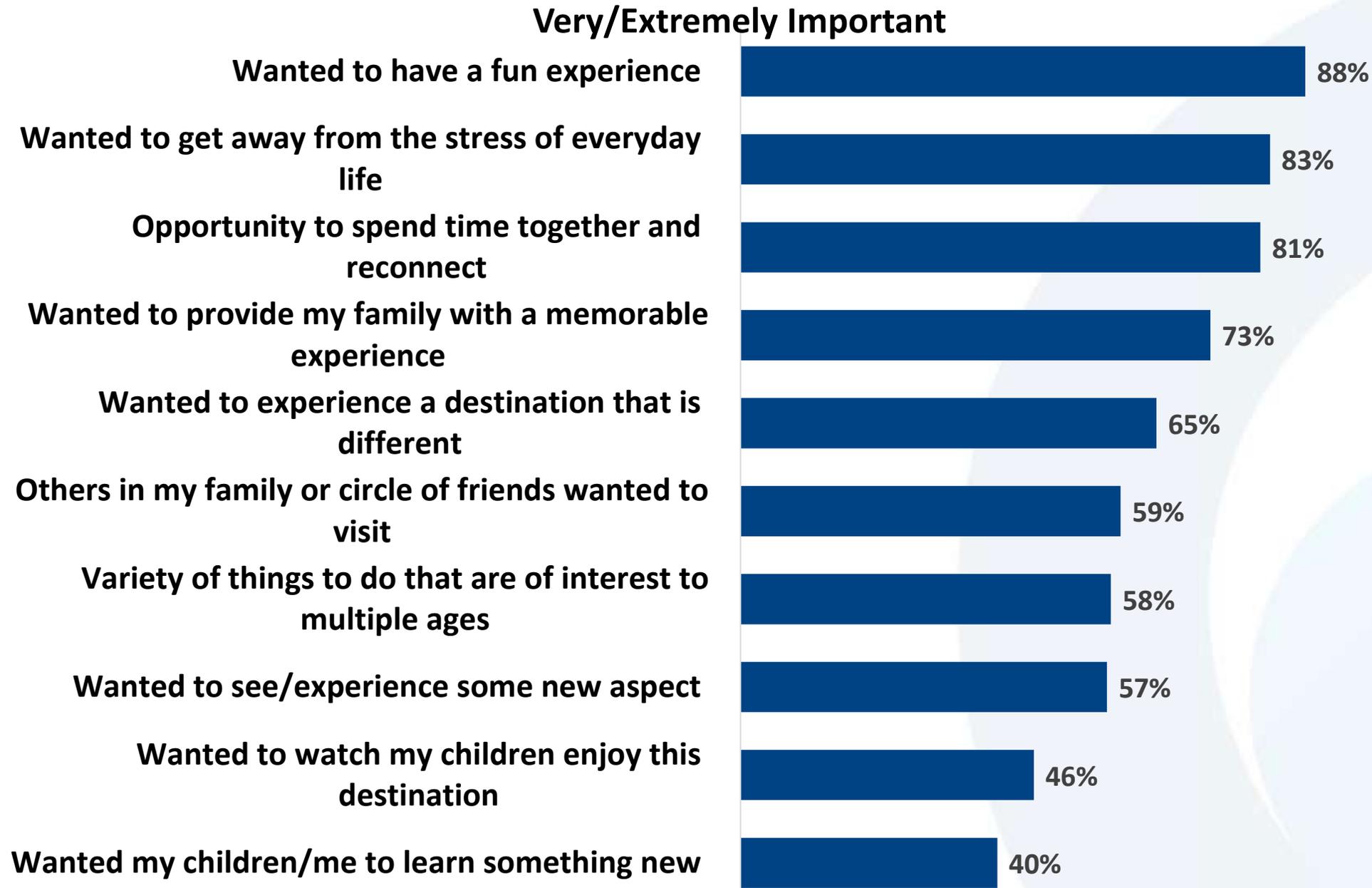
17%

Shopping

Q27: Of these activities, please indicate if there were any that were a major influence in your visiting the Lake Lure & the Blue Ridge Foothills (Rutherford County) area on that visit. You may choose up to 3.

Emotional Drivers

Visitors are highly driven by wanting to have a fun experience, getting away from the stress of everyday life, and having the opportunity to reconnect with loved ones.



Q20: Using the scale provided, please indicate how important the following were in motivating or inspiring you to visit the Lake Lure & the Blue Ridge Foothills (Rutherford County) area on your most recent visit?

Overnight Visitation & Accommodations

Nearly 8 in 10 visitors spent the night in the region on their most recent visit. Those who stayed overnight were most likely to chose a hotel/motel for their 3-night stay.

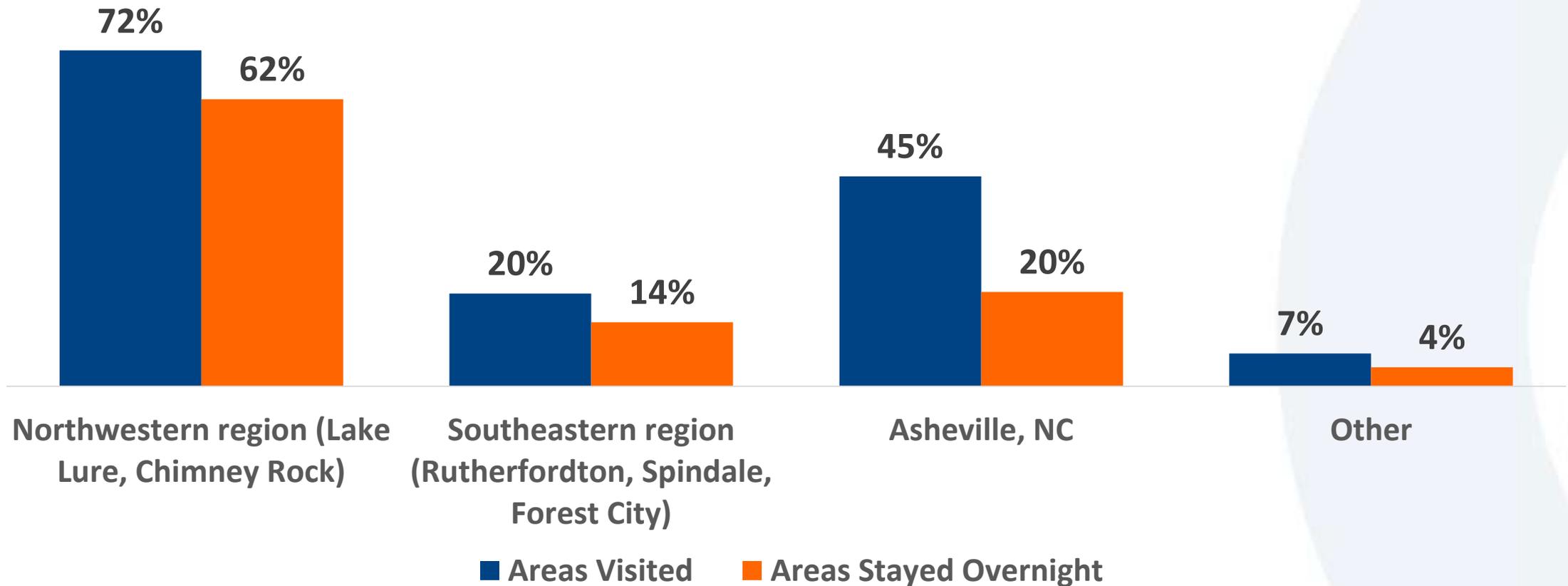


Q23: How many nights, if any, did you spend in the Lake Lure & the Blue Ridge Foothills (Rutherford County) area on this visit?

Q24: Which of the following best describes the accommodations you used for this visit?

Overnight & General Visitation Areas

The Northwestern region is the most visited and the most likely place for travelers to spend the night in the region, followed by Asheville in a distant second. In open-ended comments, a handful of people also mentioned Hendersonville.



Q25N: What area of the Lake Lure & the Blue Ridge Foothills (Rutherford County) area did you spend the night in on your most recent visit?

Q25: Which area(s) did you visit in the Lake Lure & the Blue Ridge Foothills (Rutherford County) region on your most recent visit?

RESPONDENT BASE: LL&BRF (RUTHERFORD CO) AREA VISITORS WHO SPENT THE NIGHT | N=123

RESPONDENT BASE: LL&BRF (RUTHERFORD CO) AREA VISITORS | N=155

Barriers & Hurdles to Visitation

- + *Unaided Barriers/Hurdles*
- + *Largest Barriers/Hurdles*
- + *Stated vs. Derived Barriers/Hurdles*
- + *Inspiration for Future Visitation*
- + *Demographic Categorization*

04

Non-Visitor Barriers to Visitation (Unaided)

The biggest barrier for non-visitors is a lack of awareness which leads to the area not breaking into potential visitors' consideration set. They are visiting other competitor destinations that are close to the area instead without knowing what vacation/getaway opportunities are here.

NOT ENOUGH INFORMATION

"I honestly never considered it because there are no advertisements or promotional materials, lack of information."

HAVE NEVER HEARD OF IT

"Wasn't really aware of the area - I have visited Asheville and Boone and Charlotte."

PREFER OTHER DESTINATIONS

"Doesn't seem to be the first place we think about when considering vacation."

Largest Barriers (Stated)

Non-visitors stated that the biggest barriers to visitation include not having enough information, preferring to visit other places, and that they have not received any recommendations to visit the area.



50%

Don't Have Enough Information



49%

Prefer to Visit Other Places



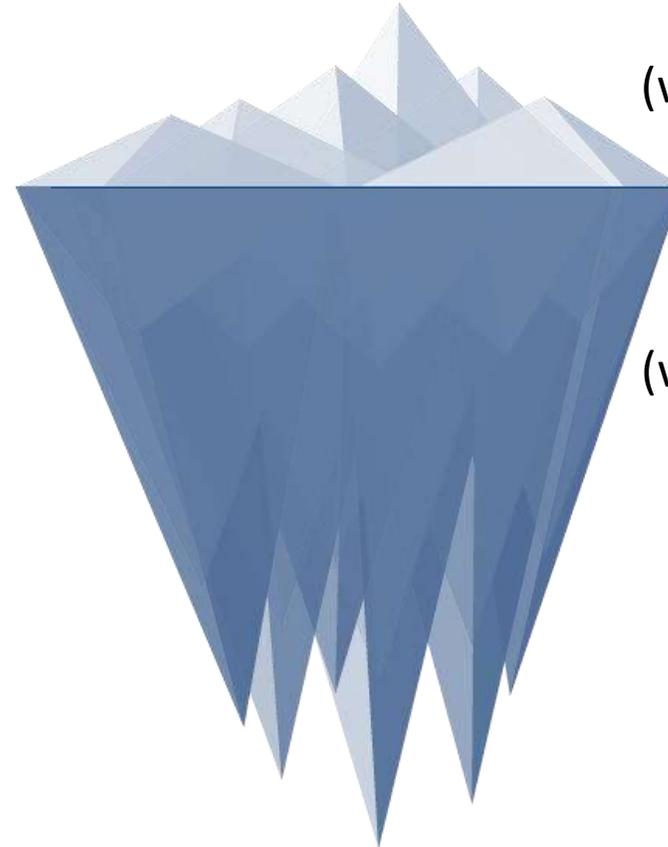
42%

No Recommendations

Q30: Using the scale provided, please rate how strongly you agree with the following reasons for why you have not visited the Lake Lure & the Blue Ridge Foothills (Rutherford County) area?

Stated vs. Derived Barriers

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



Stated Barriers

(what travelers *said* is keeping them from visiting the LL&BRF area)

Derived Barriers

(what *actually* correlates with their intent to visit the LL&BRF area)

Stated vs. Derived Barriers (Non-Visitors)

Correlation analysis revealed that a preference for other destinations, the perception that the destination is not a fit, and a lack of information are true barriers to visitation for **non-visitors**.

STATED BARRIERS

1. **Don't know enough about it to make an informed decision**
2. **Have other places that I prefer to visit**
3. Have not had anyone recommend it to me
4. Had never heard of it before
5. Inconveniently located for me/too far away
6. My spouse or significant other isn't interested
7. Too expensive of a destination
8. Not for me/not interested in this destination
9. Does not offer enough variety to entertain everyone in my traveling party
10. Not exciting enough for people my age
11. Not enough upscale lodging facilities
12. Not enough to keep children entertained
13. Not enough quality dining experiences

DERIVED BARRIERS

1. **Have other places that I prefer to visit**
2. **Not for me/not interested in this destination**
3. **Don't know enough about it to make an informed decision**
4. Have not had anyone recommend it to me
5. Does not offer enough variety to entertain everyone in my traveling party
6. My spouse or significant other isn't interested
7. Not exciting enough for people my age
8. Not enough to keep children entertained
9. Not enough quality dining experiences
10. Not enough upscale lodging facilities
11. Had never heard of it before
12. Too expensive of a destination
13. Inconveniently located for me/too far away

Largest Hurdles (Stated)

Hurdles to returning for **lapsed visitors** (those who haven't visited in the past two years) are a preference for other locations, looking for new places and no "must see" experiences to go back for.



53%

Other Places Prefer to Visit



36%

Been There/Looking for New Places



34%

No Must See Experience

Q30B: Using the scale provided, please rate how strongly you agree with the following reasons for why you have not visited the Lake Lure & the Blue Ridge Foothills (Rutherford County) area recently?

Stated vs. Derived Hurdles (Lapsed Visitors)

Having a other places travelers prefer to visit is also a prevalent hurdle for **lapsed visitors**. In addition to this hurdle, not having a recommendation and not have a compelling “must see” experience to go back for deters repeat visitation.

STATED HURDLES

1. **Have other places that I prefer to visit**
2. **Been there before and looking for new things to see and do now**
3. **No compelling "must see" experience there I need to go back for**
4. Have not had anyone recommend it to me recently
5. Experience doesn't change very often
6. Inconveniently located for me/too far away
7. Not enough quality dining experiences
8. Does not offer enough variety to entertain everyone in my traveling party
9. Not exciting enough for people my age
10. Not enough upscale lodging facilities
11. Too expensive of a destination
12. Not enough to keep children entertained
13. Not for me/not interested in this destination
14. Bad experience there in the past

DERIVED HURDLES

1. **Have other places that I prefer to visit**
2. **Have not had anyone recommend it to me recently**
3. **No compelling "must see" experience there I need to go back for**
4. Experience doesn't change very often
5. Been there before and looking for new things to see and do now
6. Does not offer enough variety to entertain everyone in my traveling party
7. Not enough upscale lodging facilities
8. Not for me/not interested in this destination
9. Not exciting enough for people my age
10. Too expensive of a destination
11. Not enough to keep children entertained
12. Inconveniently located for me/too far away
13. Not enough quality dining experiences
14. Bad experience there in the past

Inspiration for Future Visitation

Non-visitors focused on needing more information through advertising, visitor guides and word of mouth to inspire a visit to the area, while lapsed visitors were more focused on travel deals, especially regarding lodging, to draw them back to the area.

MORE INFORMATION

“I think it is a beautiful place. Would love information about the area.”

DISCOUNTS/TRAVEL PACKAGE

“Deals on hotel or recreation activities.”

ADVERTISING

“A little more word of mouth, and advertising of events and/or things to do there.”

Q31/31B: What, if anything, do you think might motivate or inspire you to visit the Lake Lure & the Blue Ridge Foothills (Rutherford County) area on a leisure trip/again in the future?

Demographic Categorization

	Overall	Visitors (Past 24 Months)	Visitors (Any time)	Non-Visitors	Considered, But Haven't Visited	Brand Advocates*
% Male	23%	31%	26%	21%	23%	22%
% Female	77%	69%	74%	79%	77%	78%
Respondent Age	45	50	49	44	43	49
% Under 12 in HH	20%	15%	16%	21%	24%	14%
% 12-17 in HH	8%	10%	8%	8%	8%	8%
% 18-34 in HH	26%	24%	24%	27%	27%	25%
% 35-54 in HH	23%	25%	24%	23%	22%	25%
% 55+ in HH	23%	26%	28%	22%	20%	28%
Household Size	2.9	3.1	2.8	2.9	3.1	2.8
Families	45%	41%	39%	46%	52%	39%
Adults Only	55%	59%	61%	54%	48%	61%
HH Income	\$64.4k	\$78.9k	\$72.1k	\$62.5k	\$62.5k	\$77.5k
% Caucasian	85%	89%	87%	85%	83%	80%
% Minority	15%	11%	13%	15%	17%	20%
Distance (miles)	142	186	150	134	139	171

*Brand Advocates are those travelers who would recommend visiting the area to their friends/family, and probably/definitely will return to the area in the next 12 months.

Demographic Categorization

	Overall	Spent the Night	Day Tripper*	Spent the Night NW Area	Spent the Night SE Area*	Visited NW Area	Visited SE Area*	Equestrian Activities*
% Male	23%	27%	28%	26%	24%	28%	29%	23%
% Female	77%	73%	72%	74%	76%	72%	71%	77%
Respondent Age	45	48	56	50	39	50	45	45
% Under 12 in HH	20%	14%	18%	14%	13%	14%	14%	16%
% 12-17 in HH	8%	10%	3%	9%	13%	10%	9%	12%
% 18-34 in HH	26%	24%	22%	20%	30%	23%	31%	30%
% 35-54 in HH	23%	27%	21%	26%	26%	26%	21%	24%
% 55+ in HH	23%	26%	36%	31%	17%	27%	25%	18%
Household Size	2.9	3.0	2.8	2.8	3.1	3.1	2.7	3.0
Families	45%	38%	28%	32%	53%	38%	48%	48%
Adults	55%	62%	72%	68%	47%	62%	52%	52%
HH Income	\$64.4k	\$74.2k	\$59.7k	\$75.7k	\$73.2k	\$76.0k	\$70.0k	\$71.1k
% Caucasian	85%	86%	91%	93%	47%	89%	61%	71%
% Minority	15%	14%	9%	7%	53%	11%	39%	29%
Distance (miles)	142	176	92	176	170	178	149	161

**Indicates directional purposes only due to sample size below 75N.*

Conclusions and Recommendations

Conclusions

- **Lake Lure & the Blue Ridge Foothills is perceived as a very good place to visit, and satisfaction among visitors is high.** The area features beautiful scenery, friendly people, a variety of outdoor recreational things to do, and a relaxing atmosphere. Visitors both love it and are willing to recommend it to their friends and family members.
- **But, as a travel destination a few issues prevent it from maximizing its potential.** Brand awareness is comparatively low and the area is *perceived* as lacking a variety of exciting things to see and do and “must sees.”
- **And, the region is geographically fragmented in a manner that impedes cooperation.** As a whole, the region is seen as lacking a variety of exciting things to see and do, putting the entire area at a competitive disadvantage compared to its competitors.

Recommendations

- **Align on one clear, simple brand identity.** Even at low levels, the unaided brand awareness demonstrated by the words “Lake Lure” shows that it is still the strongest identity for the destination, even if it’s not the *only* component of the brand identity.
- **Align on one strong brand message.** The county has a multitude of destination assets, but it doesn’t yet possess that one singular brand message that is central to all of its marketing. It needs to be a message that competitively distinguishes it from all other destinations and clearly positions LL&BRF in the minds of potential visitors.

Recommendations

- **Ensure the website delivers on the brand promise and the destination brand perception.** The destination's greatest asset is clearly its remarkable scenic natural beauty—yet the current version of the TDA website mostly fails to deliver upon that promise. The website must present that beauty, plus key emotional drivers such as fun and the promise of relaxation, in a compelling way that converts lookers to bookers. It also must make sense of a destination that is rich yet complex.

A stronger destination website would also enable each of the county's unique small towns to maintain and market their own identity under the destination brand umbrella.

Recommendations

- **Understand the difference between destination motivators and satisfiers.** Motivators are those rational and emotional drivers which reflect traveler *passions*—interests and experiences that cause visitors to plan trips and invest their time and money with you. Satisfiers are those destination elements that don't necessarily motivate travel, but lead to an experience that drives repeat visits and word-of-mouth. What are your visitors' passions?
- **Promote the “purple cows.”** The destination is not *perceived* as having a “must see,” but it actually has several. They just need to be promoted as such. The county does have remarkable assets, but those assets aren't always well-known or seen as “purple cows,” or what Seth Godin refers to as a visitor experience so remarkable or unique that area travelers simply cannot resist stopping by to see, experience, or take a selfie with it.

Recommendations

- **Leverage emotional connections.** Likewise, nothing is more persuasive or inspirational than the opportunity to reconnect with friends and family and to create memories. While the assets of LL&BRF are extraordinary, it is the satisfaction of these higher order emotional needs that drive most decisions to visit.
- **Leverage the Brand Promoters.** Utilizing the 75% of recent visitors who already buy into, and are loyal, to the destination brand should be a mission critical part of the overarching marketing platform.
- **The 24% of visitors who spent the night outside the county are a lucrative target.** Conversion of at least some of this group into overnight guests depends upon greater promotion of the variety of lodging types readily available in the destination.

Recommendations

- **There are two other especially attractive target audiences.** *Lapsed visitors* (those who haven't visited in the last 24 months) indicate a strong likelihood to visit again, which isn't surprising given the high levels of satisfaction found among past visitors. And *Millennials* (18-34 years old) demonstrate a surprisingly strong interest in visiting the area. This is noteworthy given their rapidly growing travel frequency and spending power.
- **Invest more in destination marketing.** There is clearly market opportunity to grow the visitor economy for LL&BRF, but it will require more resources to increase brand awareness and getting the area into more travelers' consideration sets. The area has strong aided awareness and familiarity, an excellent reputation, and a very high number of travelers who have considered visiting but who never have.



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