



Asheville Convention & Visitors Bureau

Brand & Market Analysis

March 2013

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Background & Objectives

The Asheville Convention & Visitors Bureau (CVB) is tasked with implementing marketing and sales strategies to promote Asheville, North Carolina, as a leisure vacation destination. According to the CVB's prior research, these efforts bring more than 3 million overnight leisure visitors to Asheville annually, for a multi-billion dollar economic impact.

To build on this success, and to remain a top leisure trip choice in a competitive environment, the Asheville CVB has partnered with Strategic Marketing & Research, Inc., (SMARI) to evaluate its position in the marketplace.

Brand management is an important task made more complex with the increased speed of communication and the advent of social media, wherein sometimes unmanageable events become reputation-shaping news as they are happening. In order to manage its brand in this environment, a destination must be aware of the best position to occupy in consumers' minds, if it is to maintain and adequately communicate that position.

The challenge is two-fold: A) understanding the position Asheville currently occupies in consumer perception, and B) identifying its ideal position. From this point of understanding, a road map can be drawn to get the CVB from point A to point B, where it can then manage its brand by communicating the right message to the right consumers at the right time.

But identifying the best position for a tourism destination is equal parts art and science. Some drivers of visitor perception *can* be measured – factors such as past travel behavior and levels of familiarity with various places. But measuring attitudes is more challenging, and each destination must be considered in the context of its particular competitive environment. Furthermore, there are different kinds of trips – weekend getaways, family vacations, adventure trips, etc. – and different kinds of people choose destinations based on the kind of trip experience they want.

So the artistic element of brand and market analysis involves understanding a heavily nuanced set of decisions, some of which are based on objective facts but many of which are emotional, even sentimental. In SMARI's twenty-plus years of research experience in this industry, we have developed a

- **Brand & Market Analysis**
Evaluate image among current visitors, trier-rejectors and non-visitors. Identify the motivations for visiting or not visiting and the emotional connections and motivators. Explore market differences and the strategic and tactical implications.
- **Phase 1: Stakeholder Interviews**
 - *Gather information from stakeholders to provide a framework for understanding the best brand for the community.*
- **Phase 2: Online survey**
 - *1,400 surveys in key markets.*
 - *Include both visitors and non-visitors.*
 - *Utilize perceptual mapping for brand development.*
 - *Explore market differences.*

number of strategies to get inside the minds of travelers and to advise destinations on how to adopt and communicate an image that fits well and that supports increased visitation.

To this end, SMARI's analysis makes use of a number of statistical techniques such as factoring, segmentation, and perceptual mapping. The specific informational objectives included:

- *Assessing the overall image of Asheville* from the perspective of current and potential visitors;
- *Identifying key attitudes/perceptions about Asheville* as a destination, including perceptions of its key strengths and weaknesses;
- *Defining the prevailing market position, or positioning profile, of the area* in the context of consumer perceptions vis-à-vis those of key competitors, which are driven by imagery and selection criteria;
- *Investigating the competitive landscape and identifying ways in which Asheville* can differentiate and position itself as the preferred destination;
- *Gathering information on current, past and potential visitors*, including what motivated them to visit and motivations for repeat travel;
- *Identifying key motivators – both rational (product) and emotional –* to visitation of the area and its key competitors and how the CVB can prompt additional consideration and visitation;
- *Determining Asheville's key features and the benefits offered to visitors, both overall and as it might vary by market*;
- *Appraising past visitors who are not interested in future visitation* to identify the motivations for these trier-rejectors and how the CVB can motivate more repeat visitation;
- *Exploring differences in markets* that may exist and how they relate to Asheville's brand; and
- *Recommending a sustainable brand and image strategy* with accompanying measures for success.

Methodology

In order to gather the full breadth of data from relevant groups, this project was conducted in two phases: an initial qualitative effort with stakeholder groups and a second, quantitative effort. The initial steps provided context for development of the subsequent quantitative research. SMARI and CVB staff worked together to identify the people to interview and to develop an initial discussion guide. In addition, these conversations helped confirm the leisure destinations to include in Asheville's competitive set.

Subsequent small group discussions with stakeholders enabled exploration of key issues in an interactive context. Specifically, these groups enabled selection of the list of destinations to complete Asheville's competitive set, the types of attributes and personality profiles that needed to be explored further, and travel segments of interest. This effort generated volumes of useful information.

From this, a questionnaire was developed to gather further data that would enable deeper analysis. The questionnaire was deployed via online survey to travelers in defined geographic areas based on the origin of the majority of current Asheville visitors. The goal was to identify and survey reasonable numbers of recent past visitors, those who had visited but not recently (and expressed little interest in visiting), and non-visitors.

Respondents were screened to be responsible for travel planning in their household and to ensure they had taken at least one overnight leisure trip in the past year. A total of 1,356 online surveys were conducted in the following markets.



Upon completion of the data-collection process, an SPSS dataset was compiled for analysis. Survey results were weighted to be representative of the traveling populations of each market. The following report details the key findings from this research. A copy of the questionnaire appears in the Appendix.

Travel Preferences

As mentioned, when people consider taking a vacation they do so in the context of a desired kind of trip experience. Some want to be physically active, some want to do as little as possible and focus instead on relaxation, and others want to experience other cultures or learn something new. Typically there is a consideration set based on trip type – a set of weekend getaway destinations, another set of family vacation destinations, and a different set of places people consider when planning an adventure trip. The decision of trip type is typically made prior to destination selection, and then travelers choose destinations based on the kind of trip experience they want. So while some destinations may appear in multiple lists, the lists themselves tend not to compete with each other.

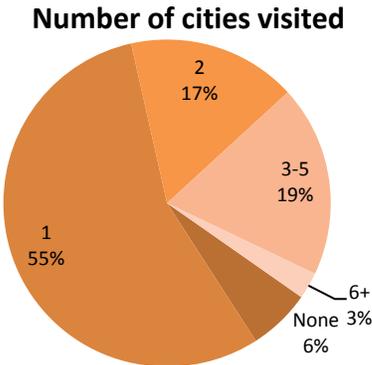
Another factor in the choice of trip type is what kind of activities people want to engage in during their leisure trip. An activity or combination of activities can qualify a destination as being among the list of choices. A person looking to hike in the mountains, for instance, will not consider destinations that do not offer mountains. A couple interested in upscale dining and craft beers will consider destinations that they know offer those options.

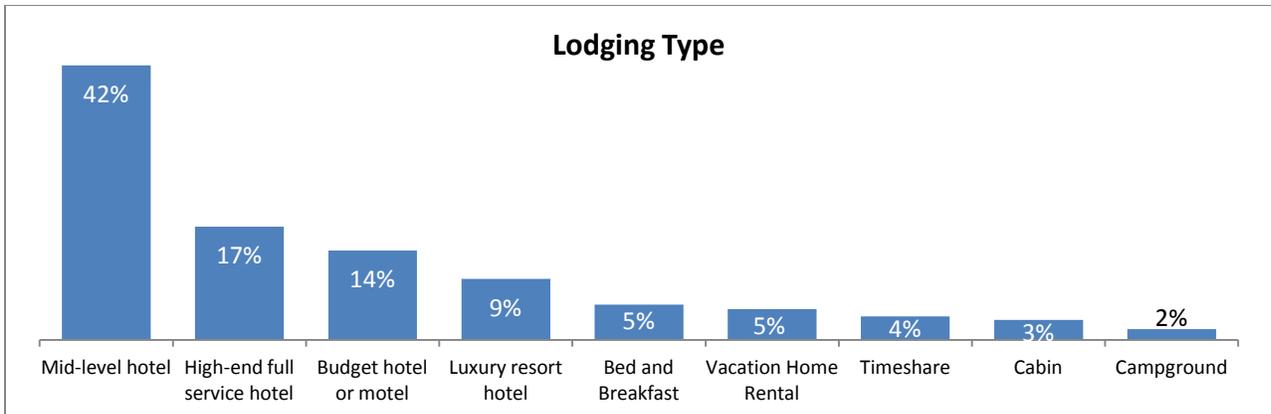
In addition to the desired kind of leisure experience, another variable is the kind of person who is traveling. Demographics play a role, since age and stage of life are important to the kind of trip desired. Traveling with active young children necessitates a destination that offers affordable, age-appropriate activities. Income and educational levels matter as well. And geography also plays a role, since familiarity with leisure destinations tends to be greater closer to where people live. Certain types of trips – weekend getaways, for instance – may be more likely taken to destinations in closer proximity, or to which cheap flights are available on convenient schedules.

Trip Specifics

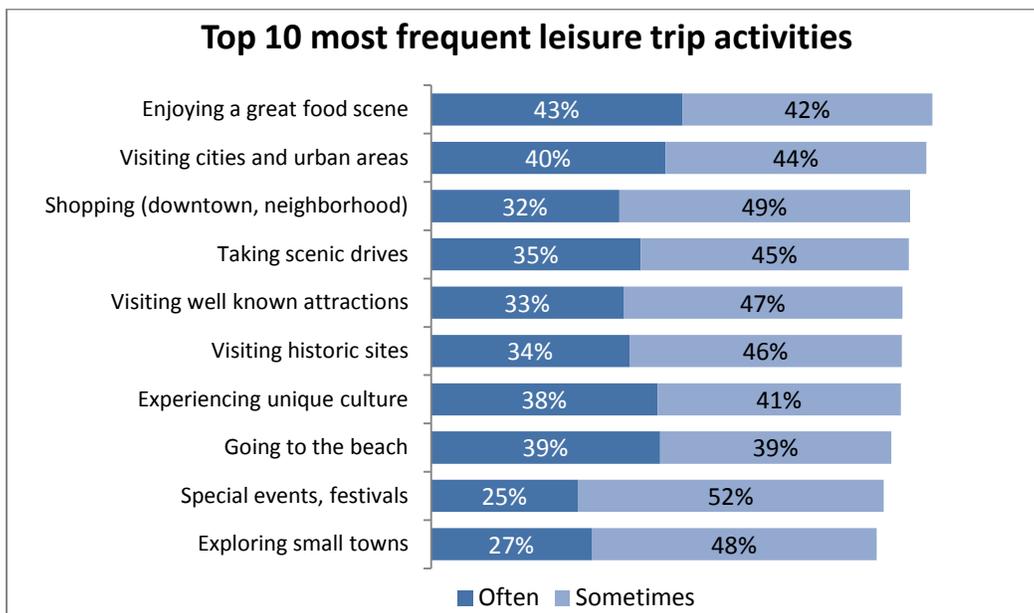
To begin the discussion of Asheville’s position in the marketplace, it is useful to look at the general types of trips people take. As mentioned, respondents were screened to ensure they had taken at least one overnight leisure trip in the past year. Overall, respondents had taken an average of just under four (3.86) overnight leisure trips in the past year. More than half had visited one of the specific destinations looked at in this report, and more than 20% had visited three or more of these destinations.

Almost half report they are most likely to choose a mid-level hotel for a leisure vacation, with almost one-fifth choosing a high-end full service hotel.





Travelers were asked to think about their participation in various activities during pleasure trips. Looking at those who report frequent and occasional participation, the most common activities are fairly general in the sense that they do not require a particular topography, skill or gear. Going to the beach is the exception. At the other end of the spectrum, fewer than one-fifth of travelers report frequent or occasional participation in activities such as snowmobiling, hunting or motorcycling.



Another way to understand people’s travel preferences is to ask them to consider how well an array of statements describes them. In concert with the client, SMARI developed 18 statements that express attitudes about travel preferences. The following table shows the top seven statements; more than one-fourth of travelers overall reported the following statements described them very well. Conversely, fewer than 10% of travelers agreed that they “prefer to do very little sightseeing” or that they “prefer being led by a guide.”

In fact, people are not very good at identifying what makes a destination appealing – and generally it is a combination of types of activities or experiences and the feel or personality of the place. For example, a number of people mentioned beach destinations as a favorite. But the reasons for choosing one over another go beyond the beach itself. For example, some people like Myrtle Beach because there are lots of other things to do, while others choose Hilton Head because it is quiet and more isolated.

Ideal U.S. Vacation

While having people use words to describe their travel preferences is useful, travel is also very visual. People often become interested in a vacation or a trip experience based on pictures. It is about *seeing* – seeing the sights, seeing beautiful scenery, seeing art and cultural items in museums, seeing architecture, seeing concerts. So it makes sense to give travelers the opportunity to use visual cues when exploring their likes and dislikes.

Furthermore, text-based attributes rely heavily on respondents' interpretation of the words. For example, is "outdoor adventure" a good thing or a bad thing for a given respondent? Does "familiar" mean "boring" or "comfortable"? Even the most carefully-worded attribute statements incorporate some degree of uncertainty since individuals' biases cannot be measured. Augmenting text-based attribute ratings with image-based ratings yields richer results.

Therefore, travelers were shown various images (44 different images) and asked to create a collage of the ones that would be part of their ideal U.S. vacation. The images used were from Asheville, and thus they did exclude some activities and options. People did note that the pictures did not include beach scenes, amusement parks or casinos. So the pictures do not actually represent the ideal vacation. But they do provide insight into the "ideal" as it relates to the Asheville experience. The exercise also helps identify how consumers group ideas and activities and think about their options.

Before looking at how consumers group images, it is useful to identify those that were the favorites. The images below were included by over half of all respondents in their collages. The photos include several striking outdoor scenes, a downtown skyline, a nighttime restaurant scene and food. These scenes are obviously attractive to a wide range of people, but not very specific.



Architecture/Cityscapes

The seven images below clearly feature buildings. As a group, these images may illustrate an architecture-focused experience, and/or a kind of vacation wherein the traveler never leaves pavement. In the latter case, the travel experience is one where nature and nature-based activities are not central. As noted, two of these images were included in more than half of the collages. The two images that focus on specific buildings were the least appealing – but those that show the “city” aspect of the destination seem to generate interest.



86% of "architecture experience" collages included this image
58% of all collages included this image



80% of "architecture experience" collages included this image
54% of all collages included this image



77% of "architecture experience" collages included this image
50% of all collages included this image



53% of "architecture experience" collages included this image
41% of all collages included this image



73% of "architecture experience" collages included this image
49% of all collages included this image



53% of "architecture experience" collages included this image
36% of all collages included this image



48% of "architecture experience" collages included this image
34% of all collages included this image

Art

These five images clearly illustrate an art-focused trip experience. Depicted here are various aspects of an art vacation: creation, observation, contemplation, purchase and enjoyment. Generally these images were less popular with the overall group – although the couple at the art fair was included in more than 40% of the collages. It is the image that is of more general interest to consumers.



48% of "art experience" collages included this image
32% of all collages included this image



43% of "art experience" collages included this image
17% of all collages included this image



30% of "art experience" collages included this image
15% of all collages included this image



41% of "art experience" collages included this image
42% of all collages included this image



44% of all "art experience" collages included this image
26% of all collages included this image

Mountain Scenery

These thirteen images depict a vacation experience in which mountain scenery is central. Some of the images show only the mountains, whereas some show an activity – scenic drive, hiking, sitting – taking place in the mountains. But the mountains dominate – and these are distinct from the category of photos that characterize more active outdoor participation. As noted, four of these had strong general appeal. Interestingly, those with the lowest appeal showed activities – hiking, biking and camping.



included in 93% of all "mountain scenery experience" collages
59% of all collages included this image



included in 86% of all "mountain scenery experience" collages
51% of all collages included this image



included in 72% of all "mountain scenery experience" collages
33% of all collages included this image



included in 77% of all "mountain scenery experience" collages
43% of all collages included this image



included in 82% of all "mountain scenery experience" collages
54% of all collages included this image



included in 45% of all "mountain scenery experience" collages
25% of all collages included this image



included in 78% of all "mountain scenery experience" collages
38% of all collages included this image



included in 30% of all "mountain scenery experience" collages
18% of all collages included this image



included in 58% of all "mountain scenery experience" collages
35% of all collages included this image



included in 61% of all "mountain scenery experience" collages
27% of all collages included this image



included in 89% of all "mountain scenery experience" collages
54% of all collages included this image



included in 91% of all "mountain scenery experience" collages
56% of all collages included this image



included in 74% of all "mountain scenery experience" collages
51% of all collages included this image

Outdoor Thrill

These three images show the most extreme, rigorous activities. Interestingly, while two of the images show physically invigorating activities – zip-lining and white-water rafting – the third shows an activity that might be considered emotionally invigorating – public music performance. The data show that travelers experience these three images similarly. None of these pictures generated strong overall appeal.



81% of all "outdoor thrill" collages included this image
37% of all collages included this image



50% of all "outdoor thrill" collages included this image
28% of all collages included this image



59% of all "outdoor thrill" collages included this image
39% of all collages included this image

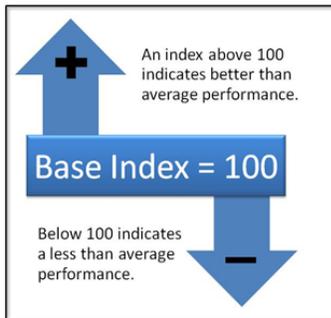
This variety and the wide range of experiences that travelers are seeking when they choose vacation destinations highlight the difficulty in trying to determine the ideal position for any particular destination to try to achieve. It is not possible to be all things to all people. And looking at travelers' views in the aggregate is not actionable.

For this reason, SMARI employed factor analysis to group travel choices based on attitudes about travel preferences and activities in which travelers prefer to engage on leisure trips. The result was three distinct groups of desired trip experiences. Understanding these groups enables us to look at what kinds of experiences each group seeks in a vacation, in order to clarify what Asheville offers various travelers.

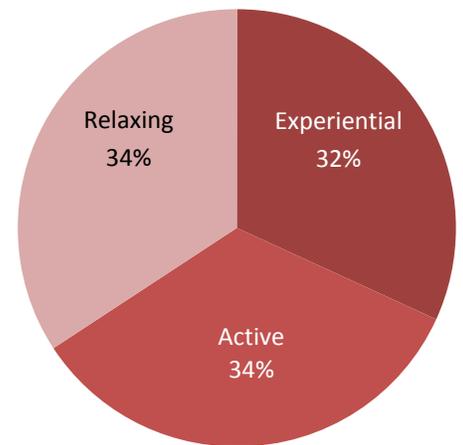
Grouping Desired Trip Experiences

The three groups of desired trip experiences revealed through factor analysis are “active,” “relaxing” and “experiential.” Among respondents, these desired trip experiences are sought fairly evenly. Following is a discussion of each group. Understanding these groups of desired trip experiences is key to determining the most efficacious positioning strategies for Asheville.

Several of the measures reported in each segment discussion have been *indexed*. Indexing is a concise way to compare how segments rated various measures relative to one another. An index shows how much above or below average a particular rating is. With an index, a score of 100 indicates an average rating. A score of 110 means a rating is 10% above average, and a score of 90 indicates 10% below average.



Desired Trip Experiences



(52%) have at least one child under the age of 18 living in their household, and this is the group most likely to report being “single/never married.” Most (52%) have a college degree.

Relaxing Travel

Compared to other travelers, relaxation-seekers choose the fewest number of images, on average, to include in their ideal U.S. vacation collage. They prefer to do fewer things. They are also less frequent travelers, with just 3.46 trips on average in the past year.

Those seeking relaxing travel experiences are the oldest; they average 47 years of age. They are the least educated; more than one-fifth (22%) are high school graduates or less.

Average number of images included in ideal vacation collage	
Active	16
Relaxing	15
Experiential	20

Relaxers are the most likely travelers to choose a budget hotel or motel or a vacation home rental. They index highest on these statements:

- The best vacation is restful without too much physical activity.
- My favorite thing about a vacation is the opportunity to just kick back and do as little as possible.
- I prefer to do very little sightseeing on my vacations.



This image is the only one for which relaxers index higher than other travelers. The image most commonly selected by these travelers is one of food. The only activity for which they index higher than other travelers is gambling.

Open-ended responses to relaxation-seekers’ favorite place for a leisure trip include things like, “You don’t have to pack much clothes and you can enjoy the fun in the sun and not have to worry about wearing coats and jackets.”

One relaxation-seeker commented, when asked to describe his ideal U.S. vacation collage, “I did not see any theme parks, rides, gambling. That’s my idea of fun!!!”

Experiential Travel

Experiential travelers are remarkable for the volume and variety of activities and experiences they seek during leisure travel. When given a list of activities to choose, experience-seekers choose the highest number, higher even than active travelers. Experiencers index highest in their agreement with the following statements, in this order:

Average number of vacation activities	
Active	7
Relaxing	5
Experiential	9

- I am interested in learning about the history and culture of the people of a destination.
- I enjoy learning about and experiencing different cultures when I travel.
- When I visit a new destination I want to immerse myself in the culture and get to know the people.
- I love to sight see and experience all a destination has to offer.
- I like to try lots of new and different things that are unique to a destination.
- I enjoy trying new/adventurous activities or attractions first hand.
- I like to go to places that other people dream about going.
- I prefer visiting places I have never visited.

The specific kinds of activities experiential travelers index highest on are shown at right. Notably, these are more general experiences relative to those active travelers index highest on, which tend to be more physically active and less cerebral.

Below are the images experiencers were more likely to select than other travelers – this collection is notable both for its volume and its variety. A notable quote that captures this travel type well was given in response to the request that travelers choose the one destination they like best as a place to visit: “Wow, I don't think I have only one favorite. My husband and I like to go to different places every year. We like to explore new cities.”

Experiential travelers index highest on participating “always”
Experiencing the unique culture of the area
Visiting historic sites
Cultural activities such as museums and the performing arts
Sightseeing or taking tours
Visiting art galleries, or art districts
Seeing interesting architecture
Visiting well known attractions
Enjoying downtown vitality
Exploring small towns
Visiting cities and urban areas
Attending special events and festivals
Shopping in a downtown or neighborhood district (not a mall)
Exploring greenways
Taking scenic drives
Visiting a place to enjoy the great food scene
Evening entertainment and nightlife
Shopping at a mall

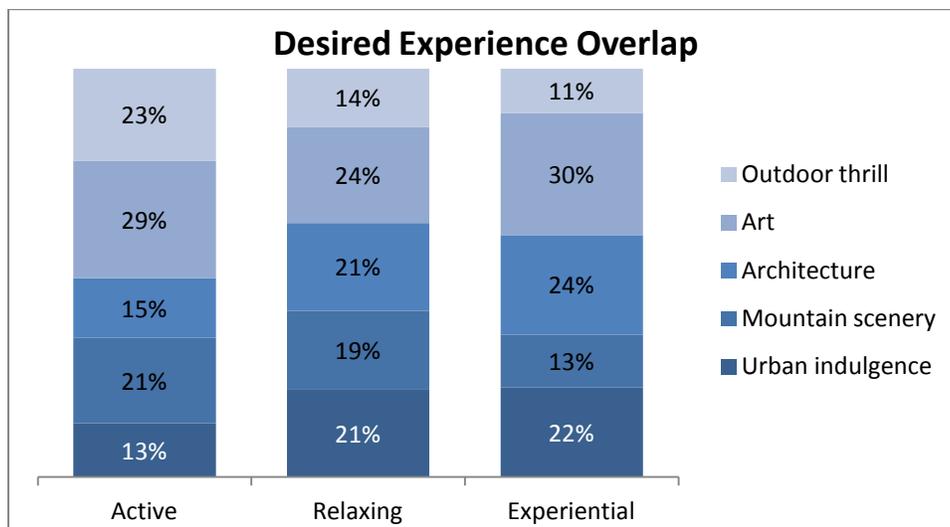


Compared to other travelers, these are the most likely to choose a high-end full service hotel or a mid-level hotel. With an average age of 47 (just slightly younger than relaxers), many of these travelers might describe themselves as empty nesters. In fact, experiential and relaxing travelers are very similar in age, but relaxers prefer to do very little, while experiencers want to do and see a lot.

Experiential travelers have higher incomes and are more likely than other travelers to have advanced degrees. Of the three types of travelers, they are the most likely to be divorced, most likely to live in 1- or 2-person households, and least likely to have children under the age of 18 living at home. Compared to active and relaxing travelers, experience-seekers are mostly (64%) female, whereas the other two groups are more or less evenly split by gender.

Children <18 at home	
Active	52%
Relaxing	42%
Experiential	35%

Interestingly, these image-based desired trip experiences do not correspond directly with the Active, Relaxing, and Experiential desired trip experiences. Rather, active travelers are split between the five image-based experiences, as are relaxers and experiencers, as shown in the chart below.



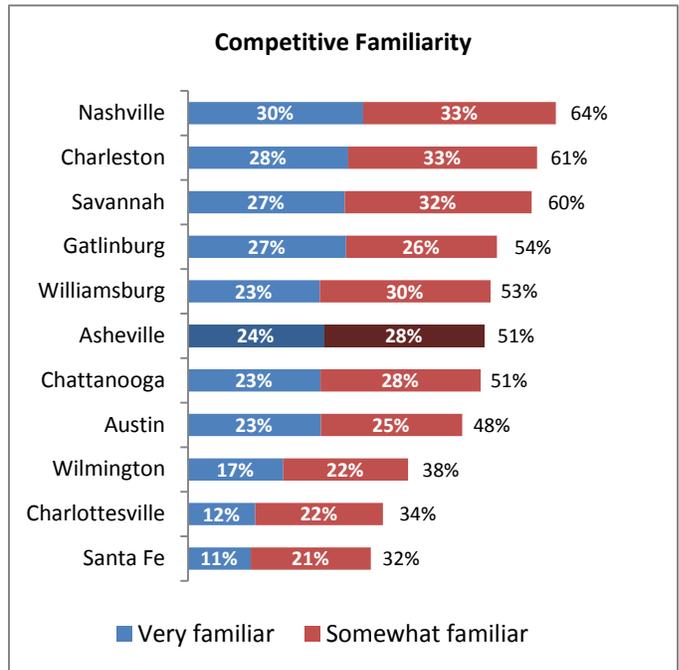
This information highlights the complexity of the travel decision process – and how it is not enough to consider motivations and positioning generally. Rather it is critical to explore the best way to specifically position a destination among its competitive set, and with a specific audience in mind.

Therefore, it is now useful to turn to an in-depth analysis of how consumers view Asheville, how it compares to the competitive set and what are the key differentiators and drivers of interest.

Competitive Overview

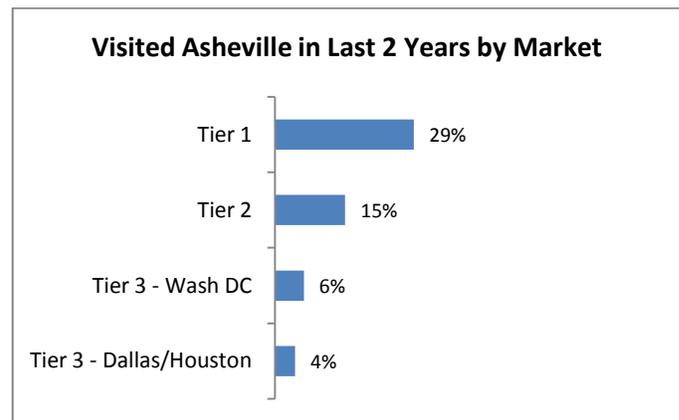
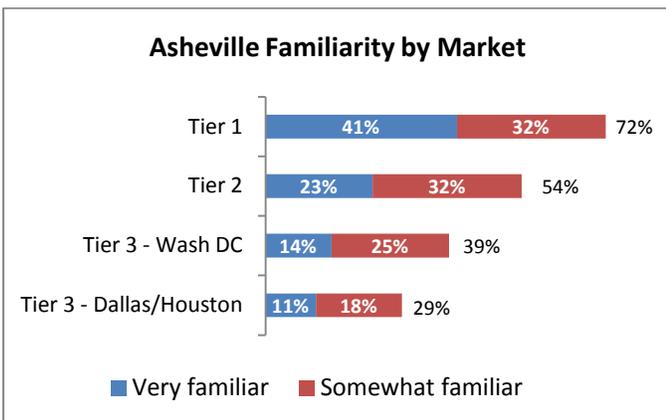
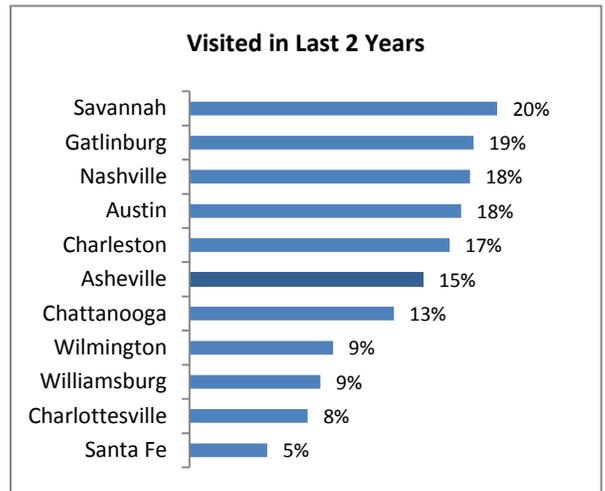
As described in the methodology, Asheville's competitive set was derived from prior research, and confirmed during conversations with the client and stakeholders. Destinations are shown in the chart at right.

Asheville resides in the middle of the competitive set in terms of familiarity and recent travel. About half of the total target audience indicates having some degree of familiarity with Asheville's leisure trip offerings. In total, 15% of these travelers have visited Asheville in the last two years. Nashville, Charleston, Savannah and Gatlinburg are the "top tier" cities in this regard.

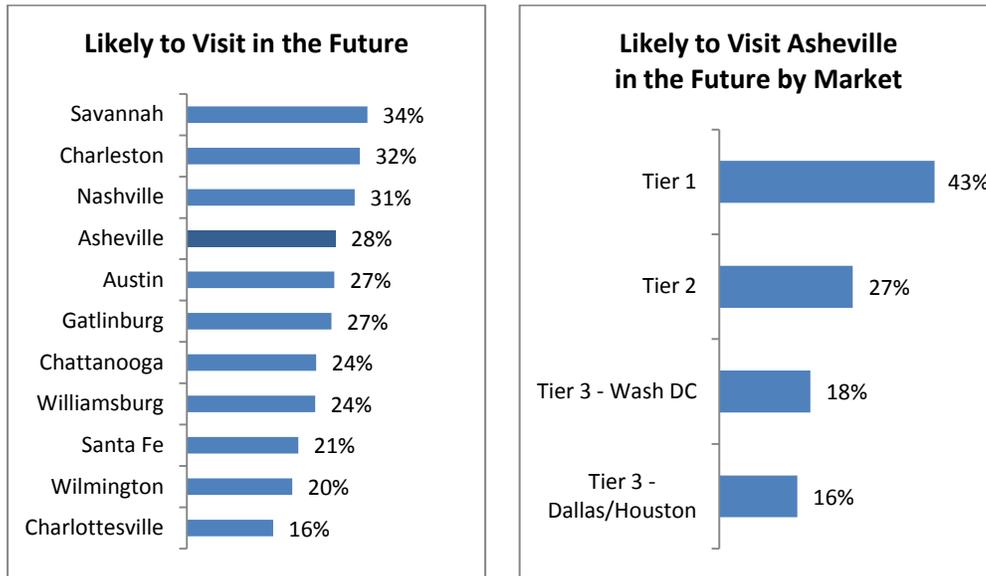


There is an opportunity to increase familiarity and travel from all of the markets outside the specific targets in Tier 1.

Naturally, those who live closer to Asheville are more familiar with the city and have higher levels of recent visitation. But it is noteworthy that the levels of familiarity and visitation are much stronger in the four markets where advertising has been targeted. Outside those areas, familiarity and visitation falls off quite significantly.



The measure of likelihood to visit for a future leisure trip tells a similar story. Asheville has room to improve competitively, as it trails Savannah, Charleston and Nashville. Also, interest is much higher among the established markets and decreases significantly after that. It is also significant that familiarity and likelihood to visit are only slightly higher in the Washington, DC, market (which is significantly closer) compared to the other Tier 3 markets in Texas.



Another consideration is that the competitive set is somewhat different depending upon geography:

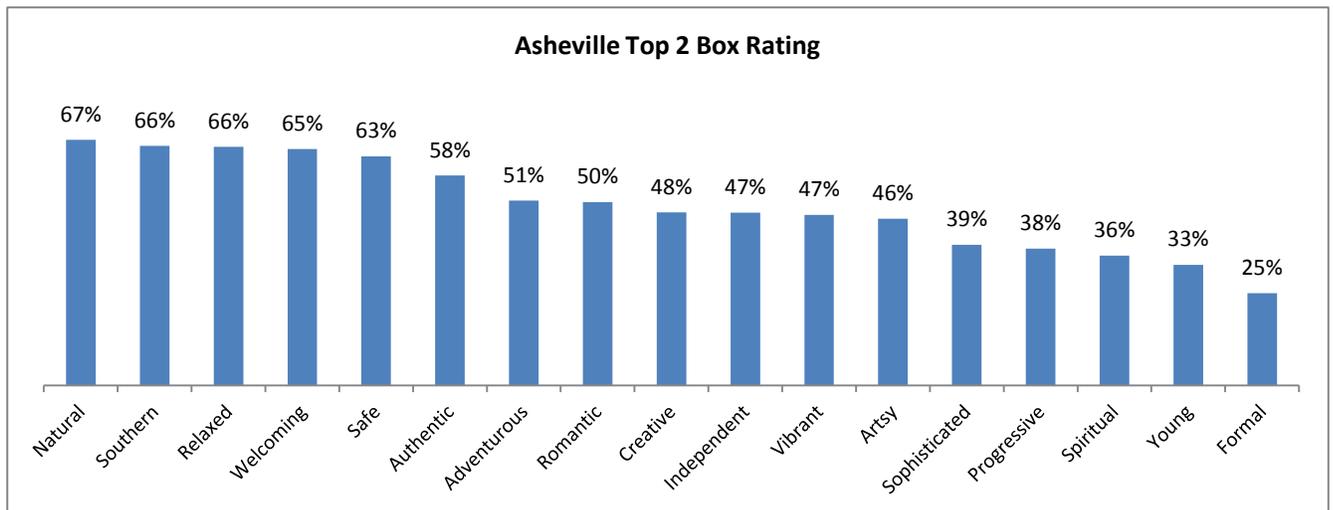
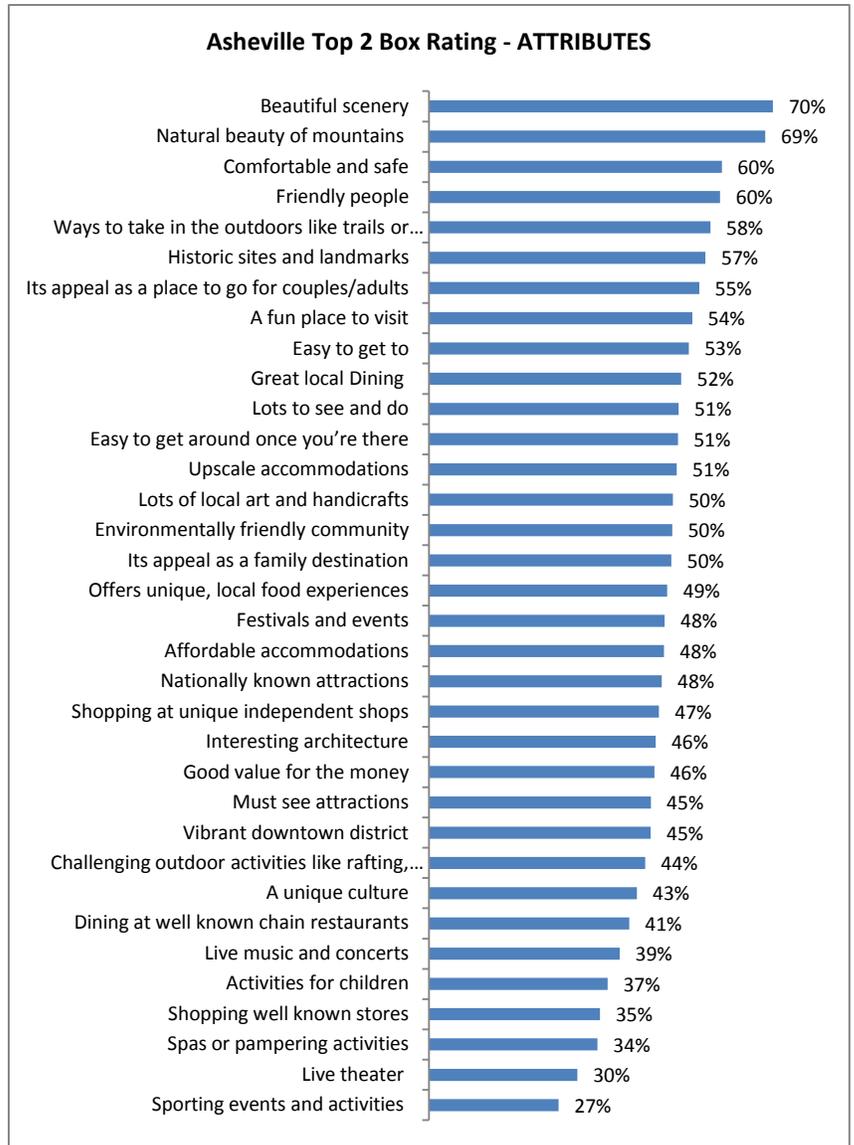
- Tier 1 - Asheville ranks third in likelihood to visit after Savannah and Charleston.
- Tier 2 - Asheville ranks fifth in likelihood after Gatlinburg, Nashville, Charleston and Savannah.
- In DC, Asheville ranks sixth after Williamsburg, Charleston, Charlottesville, Savannah and Santa Fe.
- In the Tier 3 Texas markets, Asheville ranks sixth after Austin, Nashville, Santa Fe, Savannah and Charleston.

These findings do suggest that geography plays a key role – but also that there are destinations that appeal across all of these markets. Savannah and Charleston were rated better than Asheville regardless of the market. And Santa Fe generated interest among the DC market that was stronger than Asheville. So geography is not the determining factor, but is rather one issue that influences interest – and can be overcome if the perceived product/appeal is strong enough.

Given these findings, it is important to explore Asheville’s image among potential visitors and how it varies by familiarity and market. The goal will be to identify why interest is so much higher among the Tier 1 markets, and how to capitalize on those points of differentiation in promoting outside those areas.

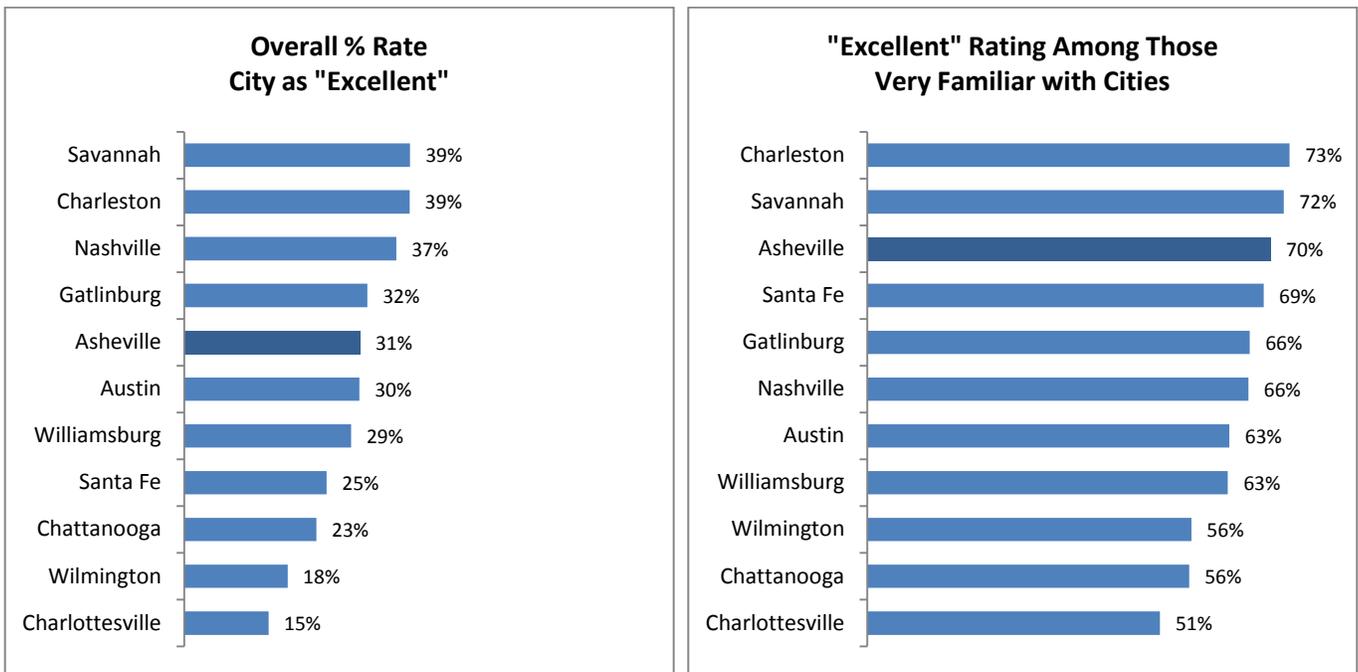
In terms of leisure travel offering, Asheville's strongest specific image is that of a place with beautiful mountain scenery. It is also seen as a safe, friendly city with outdoor recreation and historic sites or landmarks (Biltmore). Leisure travelers are less likely to think of Asheville as a place with live entertainment, activities for children, well-known stores, spas or sporting events.

In terms of destination personality, Asheville is perceived most strongly by its "southern" character, and defined as natural, relaxed, welcoming, safe and authentic. Asheville is less likely to be seen as a youthful, spiritual or formal leisure travel destination. Of course, while looking at Asheville's image is interesting, it is also critical to understand how the other competitive destinations are viewed, and what differentiates Asheville from the other cities.



Competitive Image

Leisure travelers do not think of a destination in a vacuum. Their perception of a place is relative to how they feel and what they know about other destinations, which makes it important to review Asheville's image relative to the competitor cities. Asheville falls in the middle of the pack in terms of overall rating as a place to visit for a leisure trip. In total, 30% rate Asheville as "excellent" compared to about 40% rating Savannah, Charleston and Nashville at this level. When considering only those who are very familiar with each city, Asheville is among the highest-rated cities. This is more evidence of Asheville's strong tourism product.

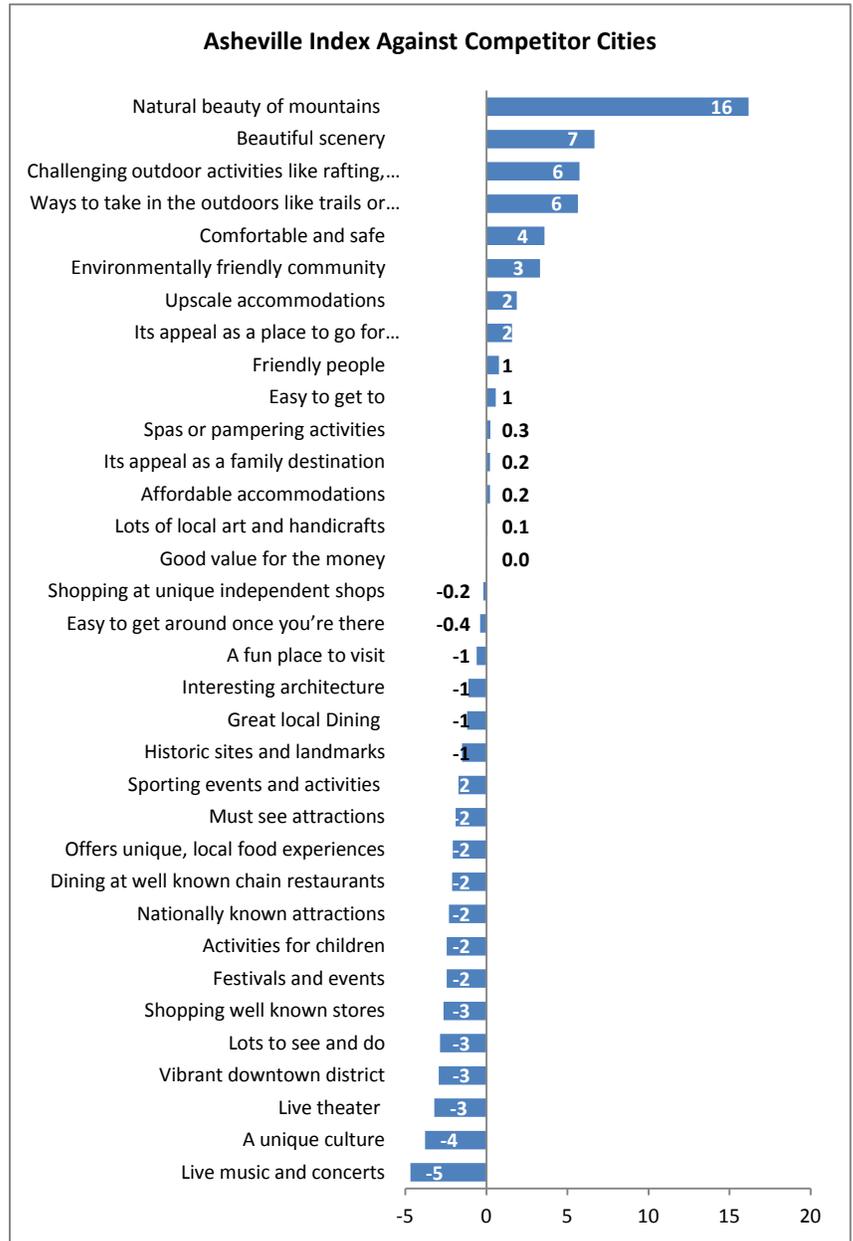


Attributes

Asheville’s strongest specific images relative to other cities tested are *beautiful scenery* and *natural beauty of the mountains*. This is no different from Asheville’s image in isolation, but the attribute *challenging outdoor activities* does serve to define Asheville more strongly relative to the competition than it did when reviewing Asheville alone.

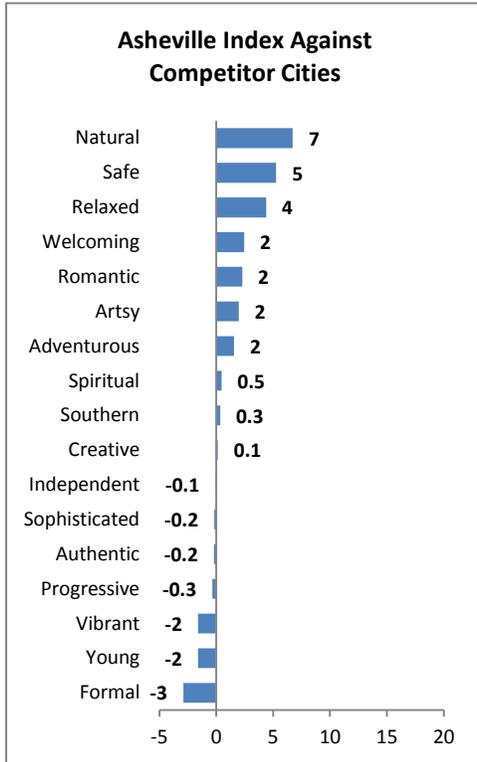
It is also interesting to note the areas where Asheville is not as strong as the competitive set. These include *live music and concerts*, *a unique culture*, *live theater*, *a vibrant downtown*, *lots to see and do* and *shopping well known stores*.

Of course, it will be important to explore differences in the image due to familiarity and past visitation – but this provides an overview of the current perceptions relating to strengths and weaknesses.



Numbers indicate the % above or below the overall average rating across competitor cities. For example, Asheville rates 16% higher than average for “Natural beauty of the mountains.”

Personality



Asheville's personality relative to the competitor cities is most strongly defined by *natural*, *safe* and *relaxed*. It has less of a *southern* image when compared to the competition. It is also less likely to be viewed as *formal*, *young* or *vibrant*.

Reviewing ratings for attributes and personality together, Asheville tends to get ratings that are more neutral, without strong positive or negative comparative ratings. In part, this is because the competitive set includes a variety of cities that are more specifically "defined" by some of the attributes. As a result, while Asheville may be viewed as quite different from a specific competitor, overall the image tends to be more neutral.

A review of the image perceptions of each of the competitive destinations will help to highlight this issue. Then the ratings will be used to create a "perceptual map" to highlight the overall competitive landscape and Asheville's current position.

Asheville

Competitively, Asheville is defined by the outdoors - the mountains, the scenery and outdoor activities. It is viewed as natural, comfortable and safe, a good place for adults with friendly people. The Biltmore is recognized with the high rating for upscale accommodations.

Image Attribute	Asheville
Natural beauty of mountains	116
Beautiful scenery	107
Challenging outdoor activities like rafting, climbing or zip lines	106
Ways to take in the outdoors like trails or parks	106
Comfortable and safe	104
Environmentally friendly community	103
Upscale accommodations	102
Its appeal as a place to go for couples/adults	102
Friendly people	101
Easy to get to	101
Spas or pampering activities	100
Its appeal as a family destination	100
Affordable accommodations	100
Lots of local art and handicrafts	100
Good value for the money	100
Shopping at unique independent shops	100
Easy to get around once you're there	100
A fun place to visit	99
Interesting architecture	99
Great local Dining	99
Historic sites and landmarks	99
Sporting events and activities	98
Must see attractions	98
Offers unique, local food experiences	98
Dining at well known chain restaurants	98
Nationally known attractions	98
Activities for children	98
Festivals and events	98
Shopping well known stores	97
Lots to see and do	97
Vibrant downtown district	97
Live theater	97
A unique culture	96
Live music and concerts	95

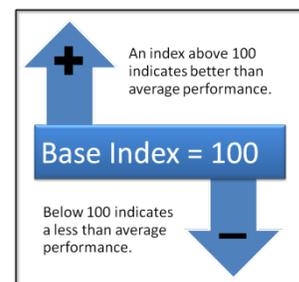
Personality Attribute	Asheville
Natural	107
Safe	105
Relaxed	104
Welcoming	102
Romantic	102
Artsy	102
Adventurous	102
Spiritual	100
Southern	100
Creative	100
Independent	100
Sophisticated	100
Authentic	100
Progressive	100
Vibrant	98
Young	98
Formal	97

Austin

Austin is clearly defined by its live music/entertainment scene, festivals and vibrant downtown area. Austin also indexes high for having unique local dining options. Its personality is young, progressive, vibrant, creative, independent and artsy. Austin takes pride in this image, using the city slogan “keep Austin weird.” Austin is not known as a place with beautiful scenery.

Image Attribute	Austin
Live music and concerts	115
Sporting events and activities	111
Live theater	111
Festivals and events	110
Vibrant downtown district	109
Great local dining	108
A unique culture	107
Shopping well-known stores	107
Upscale accommodations	106
Environmentally friendly community	106
Dining at well-known chain restaurants	106
A fun place to visit	105
Offers unique, local food experiences	104
Friendly people	104
Comfortable and safe	104
Lots to see and do	103
Its appeal as a place to go for couples/adults	103
Spas or pampering activities	103
Good value for the money	102
Shopping at unique independent shops	102
Affordable accommodations	102
Challenging outdoor activities like rafting, climbing or zip lines	102
Easy to get to	101
Easy to get around once you're there	100
Must see attractions	100
Activities for children	100
Lots of local art and handicrafts	100
Interesting architecture	100
Ways to take in the outdoors like trails or parks	100
Historic sites and landmarks	100
Its appeal as a family destination	98
Nationally known attractions	98
Beautiful scenery	93
Natural beauty of mountains	92

Personality Attribute	Austin
Young	113
Progressive	109
Vibrant	106
Creative	106
Independent	106
Artsy	106
Southern	102
Sophisticated	102
Spiritual	101
Adventurous	101
Relaxed	100
Authentic	100
Safe	100
Welcoming	99
Romantic	97
Formal	97
Natural	97



Nashville

Like Austin, Nashville is known for live entertainment. Unlike Austin, Nashville is seen as a place with nationally known and “must see” attractions. Nashville is the largest city in the competitive set and is seen as having much to offer the leisure traveler. In fact, Nashville indexes above average on most of the image attributes. Outdoor activities are the only area that Nashville receives below average ratings. In terms of personality, Nashville is an interesting juxtaposition of “hip” and “southern hospitality.”

Image Attribute	Nashville
Live music and concerts	122
Live theater	115
Nationally known attractions	112
Festivals and events	108
Must see attractions	108
Its appeal as a place to go for couples/adults	107
Shopping well-known stores	107
Dining at well-known chain restaurants	107
Sporting events and activities	107
Lots to see and do	106
Easy to get to	106
Vibrant downtown district	106
A fun place to visit	106
A unique culture	106
Great local dining	104
Upscale accommodations	104
Offers unique, local food experiences	103
Friendly people	103
Its appeal as a family destination	102
Shopping at unique independent shops	102
Affordable accommodations	102
Easy to get around once you're there	102
Historic sites and landmarks	102
Activities for children	102
Good value for the money	101
Natural beauty of mountains	100
Lots of local art and handicrafts	100
Environmentally friendly community	100
Spas or pampering activities	100
Interesting architecture	98
Beautiful scenery	98
Challenging outdoor activities like rafting, climbing or zip lines	98
Comfortable and safe	98
Ways to take in the outdoors like trails or parks	97

Personality Attribute	Nashville
Creative	109
Southern	107
Vibrant	107
Young	106
Artsy	106
Progressive	105
Welcoming	103
Independent	102
Authentic	101
Sophisticated	101
Adventurous	99
Formal	98
Relaxed	98
Romantic	98
Spiritual	98
Safe	96
Natural	96

Savannah

Leisure travelers perceive Savannah to be a romantic, southern city with interesting architecture, history, local food and a vibrant downtown district. Overall, Savannah is one of the highest-rated cities in terms of a place to visit for a leisure trip. Like Nashville, outdoor activities and natural beauty are the only areas for which Savannah indexes below average.

Image Attribute	Savannah
Interesting architecture	109
Offers unique, local food experiences	108
Vibrant downtown district	107
Historic sites and landmarks	107
Great local dining	107
A unique culture	106
Lots of local art and handicrafts	106
Its appeal as a place to go for couples/adults	106
Easy to get around once you're there	106
A fun place to visit	106
Good value for the money	106
Friendly people	106
Upscale accommodations	105
Shopping at unique independent shops	105
Nationally known attractions	105
Lots to see and do	104
Must see attractions	104
Beautiful scenery	104
Shopping well-known stores	103
Affordable accommodations	103
Easy to get to	103
Spas or pampering activities	103
Environmentally friendly community	102
Its appeal as a family destination	101
Comfortable and safe	101
Live music and concerts	101
Live theater	101
Dining at well-known chain restaurants	100
Festivals and events	100
Ways to take in the outdoors like trails or parks	98
Activities for children	98
Sporting events and activities	96
Challenging outdoor activities like rafting, climbing or zip lines	93
Natural beauty of mountains	87

Personality Attribute	Savannah
Romantic	113
Southern	113
Formal	112
Sophisticated	110
Authentic	109
Vibrant	109
Artsy	106
Relaxed	105
Welcoming	105
Creative	104
Independent	103
Safe	102
Progressive	102
Spiritual	102
Young	101
Adventurous	99
Natural	98

Chattanooga

Chattanooga is an outdoor family adventure destination with beautiful mountains. It also has a southern, welcoming and relaxed image. Chattanooga received a relatively weak overall rating as a place to visit for a leisure trip, but it still manages to index at or above average for most image and personality attributes. The relatively low overall ratings might be an issue of low familiarity or of being “average” on several tourism-related dimensions.

Image Attribute	Chattanooga
Natural beauty of mountains	113
Challenging outdoor activities like rafting, climbing or zip lines	111
Activities for children	109
Easy to get to	108
Ways to take in the outdoors like trails or parks	108
Affordable accommodations	107
Sporting events and activities	107
Its appeal as a family destination	107
Good value for the money	105
Easy to get around once you're there	105
Environmentally friendly community	104
Comfortable and safe	104
Dining at well-known chain restaurants	104
Beautiful scenery	104
Lots to see and do	103
Must see attractions	103
Shopping well-known stores	103
Friendly people	102
Historic sites and landmarks	102
A fun place to visit	101
Festivals and events	101
Offers unique, local food experiences	101
Spas or pampering activities	101
Nationally known attractions	101
Live music and concerts	101
Lots of local art and handicrafts	100
Shopping at unique independent shops	100
Vibrant downtown district	100
Its appeal as a place to go for couples/adults	100
Live theater	99
A unique culture	99
Great local dining	98
Interesting architecture	97
Upscale accommodations	97

Personality Attribute	Chattanooga
Adventurous	109
Southern	106
Natural	105
Welcoming	105
Relaxed	104
Young	104
Progressive	104
Safe	104
Spiritual	103
Formal	103
Authentic	101
Romantic	101
Creative	101
Independent	100
Sophisticated	100
Vibrant	99
Artsy	98

Gatlinburg

Gatlinburg is similar to Chattanooga in that it is seen as an outdoor family adventure destination with beautiful mountains. But Gatlinburg's image does not go beyond this. It is interesting that Gatlinburg was among the top cities in terms of overall rating when it indexes below average for most image and personality attributes. This suggests that Gatlinburg has a strong singularly focused image.

Image Attribute	Gatlinburg
Natural beauty of mountains	116
Challenging outdoor activities like rafting, climbing or zip lines	109
Ways to take in the outdoors like trails or parks	106
Activities for children	105
Beautiful scenery	104
Its appeal as a family destination	103
Lots of local art and handicrafts	100
Nationally known attractions	100
Comfortable and safe	100
Lots to see and do	99
Shopping at unique independent shops	99
A fun place to visit	99
Affordable accommodations	99
Its appeal as a place to go for couples/adults	98
Friendly people	98
Easy to get around once you're there	98
Dining at well-known chain restaurants	98
Environmentally friendly community	98
Must see attractions	97
Good value for the money	97
Live theater	97
Shopping well-known stores	97
Festivals and events	96
Vibrant downtown district	96
Easy to get to	96
Upscale accommodations	95
A unique culture	95
Spas or pampering activities	94
Live music and concerts	94
Offers unique, local food experiences	94
Historic sites and landmarks	94
Great local dining	93
Sporting events and activities	89
Interesting architecture	88

Personality Attribute	Gatlinburg
Natural	103
Adventurous	102
Southern	101
Welcoming	99
Safe	99
Relaxed	99
Vibrant	97
Young	97
Independent	96
Romantic	95
Authentic	95
Creative	95
Spiritual	94
Artsy	93
Progressive	92
Formal	90
Sophisticated	88

Charleston

Charleston has an image and a personality very similar to those of Savannah. Southern charm, architecture, history, vibrant downtown and local dining define its leisure travel product. Charleston is also one of the most well-known and highest rated cities in the competitive set.

Image Attribute	Charleston
Interesting architecture	111
Upscale accommodations	108
Historic sites and landmarks	108
Offers unique, local food experiences	108
Great local dining	108
Vibrant downtown district	108
A fun place to visit	107
Spas or pampering activities	107
Shopping at unique independent shops	106
A unique culture	106
Its appeal as a place to go for couples/adults	106
Lots to see and do	106
Easy to get to	105
Lots of local art and handicrafts	105
Must see attractions	104
Shopping well-known stores	104
Live theater	104
Festivals and events	104
Comfortable and safe	104
Nationally known attractions	103
Dining at well-known chain restaurants	103
Beautiful scenery	103
Friendly people	103
Its appeal as a family destination	102
Easy to get around once you're there	102
Live music and concerts	101
Sporting events and activities	101
Environmentally friendly community	101
Good value for the money	100
Activities for children	100
Affordable accommodations	99
Ways to take in the outdoors like trails or parks	98
Challenging outdoor activities like rafting, climbing or zip lines	95
Natural beauty of mountains	81

Personality Attribute	Charleston
Southern	112
Romantic	110
Formal	109
Sophisticated	108
Authentic	104
Artsy	104
Welcoming	103
Vibrant	102
Spiritual	102
Progressive	102
Relaxed	102
Independent	101
Creative	101
Safe	100
Natural	99
Young	99
Adventurous	97

Santa Fe

Santa Fe has a unique image within the competitive set, not surprising given that it is the only desert southwestern city. Santa Fe is a mountain town like Asheville, Chattanooga and Gatlinburg, but it is seen as more unique, spiritual and artsy. It is also not perceived to be a family vacation destination.

Image Attribute	Santa Fe
Natural beauty of mountains	105
Interesting architecture	105
A unique culture	104
Spas or pampering activities	104
Lots of local art and handicrafts	103
Offers unique, local food experiences	102
Challenging outdoor activities like rafting, climbing or zip lines	100
Shopping at unique independent shops	100
Great local dining	100
Ways to take in the outdoors like trails or parks	100
Beautiful scenery	99
Upscale accommodations	99
Vibrant downtown district	98
Environmentally friendly community	98
Lots to see and do	98
Festivals and events	97
Sporting events and activities	97
Historic sites and landmarks	97
Must see attractions	96
Nationally known attractions	96
Shopping well-known stores	96
Live music and concerts	96
Easy to get around once you're there	96
Affordable accommodations	95
Live theater	95
Good value for the money	95
Its appeal as a place to go for couples/adults	95
Friendly people	94
A fun place to visit	94
Activities for children	93
Its appeal as a family destination	93
Dining at well-known chain restaurants	93
Comfortable and safe	93
Easy to get to	91

Personality Attribute	Santa Fe
Spiritual	110
Artsy	106
Natural	105
Adventurous	103
Vibrant	102
Creative	102
Independent	102
Progressive	100
Young	100
Authentic	99
Sophisticated	98
Romantic	97
Relaxed	96
Formal	96
Welcoming	94
Safe	94
Southern	75

Williamsburg

Williamsburg has nationally known historic sites and landmarks and is seen as a family destination. Williamsburg received a relatively low overall rating as a place to visit for a leisure trip, most likely related to what might be perceived as its “boring” attractions compared to other cities tested. Some of the lack of appeal also seems geographic, and likelihood to visit was much higher in the Washington, DC, market. In fact, Williamsburg is very different from the other cities and might not make sense as a member of the competitive set.

Image Attribute	Williamsburg
Historic sites and landmarks	108
Nationally known attractions	108
Must see attractions	108
Interesting architecture	107
Its appeal as a family destination	107
Activities for children	105
Comfortable and safe	103
Lots to see and do	103
Easy to get to	102
A fun place to visit	102
Friendly people	101
Upscale accommodations	101
Festivals and events	101
Beautiful scenery	101
A unique culture	101
Good value for the money	100
Lots of local art and handicrafts	100
Live theater	100
Shopping at unique independent shops	100
Its appeal as a place to go for couples/adults	99
Sporting events and activities	99
Dining at well-known chain restaurants	99
Affordable accommodations	99
Natural beauty of mountains	99
Spas or pampering activities	98
Easy to get around once you're there	98
Environmentally friendly community	98
Great local dining	98
Ways to take in the outdoors like trails or parks	98
Shopping well-known stores	97
Offers unique, local food experiences	97
Live music and concerts	96
Vibrant downtown district	95
Challenging outdoor activities like rafting, climbing or zip lines	95

Personality Attribute	Williamsburg
Formal	110
Sophisticated	106
Safe	104
Authentic	103
Artsy	101
Welcoming	101
Spiritual	101
Romantic	101
Adventurous	100
Progressive	99
Relaxed	99
Creative	99
Independent	99
Southern	98
Vibrant	97
Natural	96
Young	93

Wilmington

Wilmington has low familiarity and subsequently receives below-average ratings across the board. It seems to be more of a regional destination – so looking at its ratings just among the Tier 1 audience is helpful. From this perspective, it is viewed as affordable, with activities for children, and sporting activities.

Image Attribute	Wilmington	Indices by Tier 1
Activities for children	100	107
Affordable accommodations	98	106
Sporting events and activities	98	108
Easy to get around once you're there	98	106
Good value for the money	98	105
Spas or pampering activities	97	105
Environmentally friendly community	97	99
Ways to take in the outdoors like trails or parks	97	100
Friendly people	97	102
Easy to get to	97	104
Dining at well-known chain restaurants	97	103
Its appeal as a family destination	97	105
Comfortable and safe	96	103
Shopping well-known stores	95	101
Challenging outdoor activities like rafting, climbing or zip lines	94	97
Great local dining	94	99
Its appeal as a place to go for couples/adults	94	102
Shopping at unique independent shops	93	99
A fun place to visit	93	101
Offers unique, local food experiences	93	102
Beautiful scenery	93	96
Festivals and events	93	103
Upscale accommodations	92	96
A unique culture	92	97
Historic sites and landmarks	92	97
Live theater	91	100
Lots to see and do	91	99
Lots of local art and handicrafts	91	97
Vibrant downtown district	91	98
Interesting architecture	90	96
Must see attractions	90	95
Live music and concerts	90	97
Natural beauty of mountains	90	85
Nationally known attractions	89	92

Personality Attribute	Wilmington
Safe	100
Relaxed	99
Spiritual	98
Natural	98
Independent	96
Young	96
Southern	96
Adventurous	96
Welcoming	96
Formal	95
Progressive	95
Romantic	95
Authentic	94
Sophisticated	94
Creative	93
Vibrant	93
Artsy	91

Charlottesville

It is also difficult to define Charlottesville’s image due to low familiarity and below-average ratings on the image and personality attributes tested. Again, a review among just the Tier 1 audience is helpful, but even among this audience the image is fairly neutral.

Image Attribute	Charlottesville	Indices by Tier 1	Personality Attribute	Charlottesville
Natural beauty of mountains	101	102	Natural	97
Sporting events and activities	96	107	Safe	95
Challenging outdoor activities like rafting, climbing or zip lines	96	93	Sophisticated	94
Interesting architecture	96	97	Independent	94
Good value for the money	95	99	Formal	94
Beautiful scenery	95	96	Authentic	93
Easy to get around once you’re there	95	95	Welcoming	93
Dining at well-known chain restaurants	95	103	Relaxed	92
Comfortable and safe	95	94	Adventurous	92
Affordable accommodations	95	95	Young	92
Shopping well-known stores	94	104	Progressive	91
Lots of local art and handicrafts	94	97	Spiritual	91
Environmentally friendly community	93	96	Romantic	90
Spas or pampering activities	93	96	Southern	90
Ways to take in the outdoors like trails or parks	93	94	Creative	90
Vibrant downtown district	93	94	Vibrant	89
Historic sites and landmarks	92	94	Artsy	89
Shopping at unique independent shops	92	96		
Offers unique, local food experiences	92	95		
Friendly people	92	92		
Festivals and events	92	94		
Great local dining	92	98		
Activities for children	91	98		
Nationally known attractions	91	97		
Must see attractions	91	97		
Upscale accommodations	91	95		
Live theater	91	98		
Live music and concerts	90	97		
Easy to get to	90	88		
Its appeal as a place to go for couples/adults	90	86		
Its appeal as a family destination	89	88		
A unique culture	89	82		
A fun place to visit	88	85		
Lots to see and do	88	90		

Another way to consider positioning options is to look at the key drivers for destination selection. In some research the key drivers are determined by asking people what is important to them in a travel destination. But SMARI finds that people have a hard time identifying the motivators and that it is better to consider the drivers based on correlation analysis between consumers' ratings of a destination and their likelihood to visit. This process identifies those attributes that are statistically related to increased interest. This process is also instructive because it highlights the fact that the drivers are different for specific destinations.

The following shows the drivers for each of the destinations, and how they differ. For Asheville the drivers tend to be fairly general – a fun place to visit, appealing for couples/adults, lots to see and do. Additionally, more specific to Asheville are *nationally known attractions*, *vibrant downtown district* and *festivals and events*.

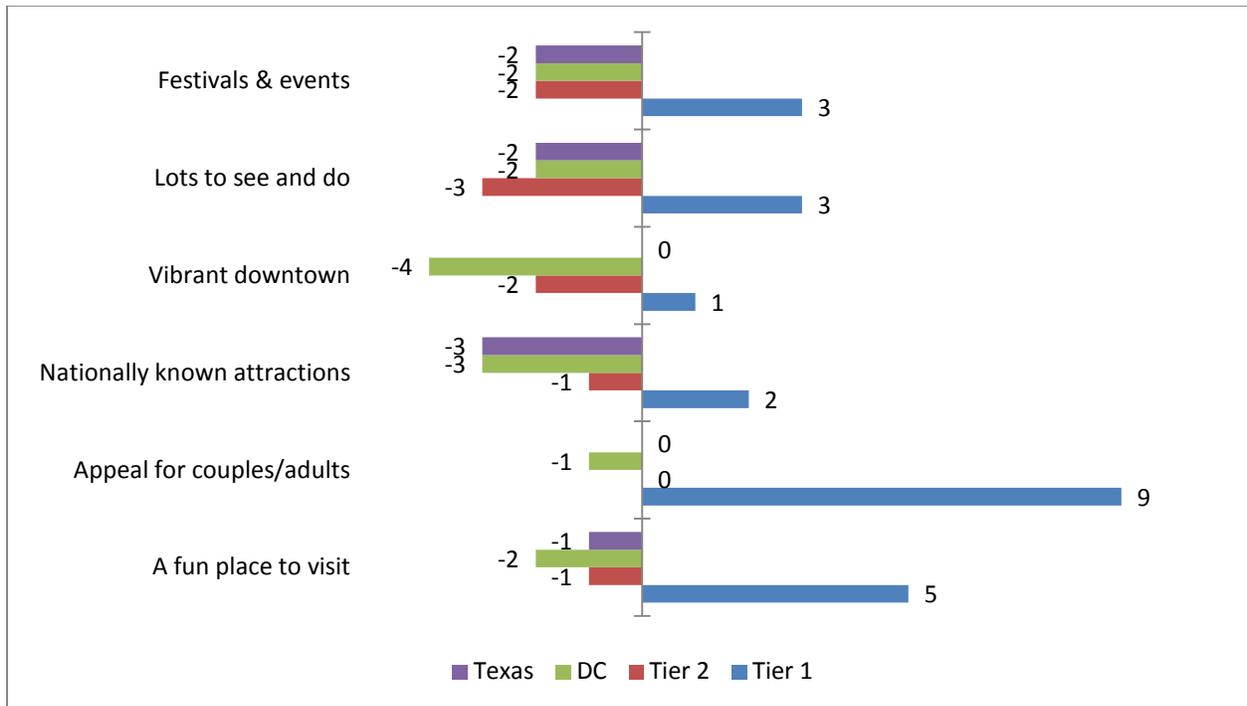
City	Top Drivers of Likely Travel					
Asheville	A fun place to visit	Its appeal as a place to go for couples/adults	Lots to see and do	Nationally known attractions	Vibrant downtown district	Festivals and events
Austin	Its appeal as a place to go for couples/adults	Upscale accommodations	Good value for the money	Must see attractions	A fun place to visit	Historic sites and landmarks
Nashville	Its appeal as a place to go for couples/adults	A fun place to visit	Friendly people	Easy to get around once you're there	Its appeal as a family destination	Great local dining
Savannah	A fun place to visit	Great local Dining	Must see attractions	Offers unique, local food experiences	Its appeal as a place to go for couples/adults	Vibrant downtown district
Chattanooga	Lots to see and do	Comfortable and safe	Must see attractions	Vibrant downtown district	Nationally known attractions	Affordable accommodations
Gatlinburg	Shopping at unique independent shops	Beautiful scenery	Must see attractions	Its appeal as a family destination	A fun place to visit	Easy to get to
Charleston	A unique culture	Interesting architecture	A fun place to visit	Offers unique, local food experiences	Vibrant downtown district	Its appeal as a place to go for couples/adults
Santa Fe	Its appeal as a family destination	Comfortable and safe	Its appeal as a place to go for couples/adults	Live theater	Must see attractions	Easy to get around once you're there
Williamsburg	A fun place to visit	Nationally known attractions	Friendly people	Offers unique, local food experiences	Lots to see and do	Easy to get around once you're there
Wilmington	Festivals and events	Historic sites and landmarks	Nationally known attractions	Vibrant downtown district	Activities for children	Lots to see and do
Charlottesville	Good value for the money	Live music and concerts	Lots to see and do	Its appeal as a family destination	Live theater	Festivals and events

There are a few attributes that are key drivers across multiple destinations:

- *A fun place to visit*
- *Nationally known/must see attractions*
- *Lots to see and do*
- *Appeal as a place for couples/adults*
- *Vibrant downtown*

These seem to represent almost the “price of consideration” – if you can't deliver on these attributes, you are unlikely to generate significant interest.

In terms of the key drivers for interest in visiting Asheville, there is good and bad news. In the Tier 1 markets, where there has been advertising and the public is more familiar, Asheville indexes above the competition in each of the key attributes. But in all the other markets, Asheville indexes only average, or more often below average. This certainly suggests that additional marketing and promotion will be necessary in whatever markets are chosen to create a stronger competitive image.



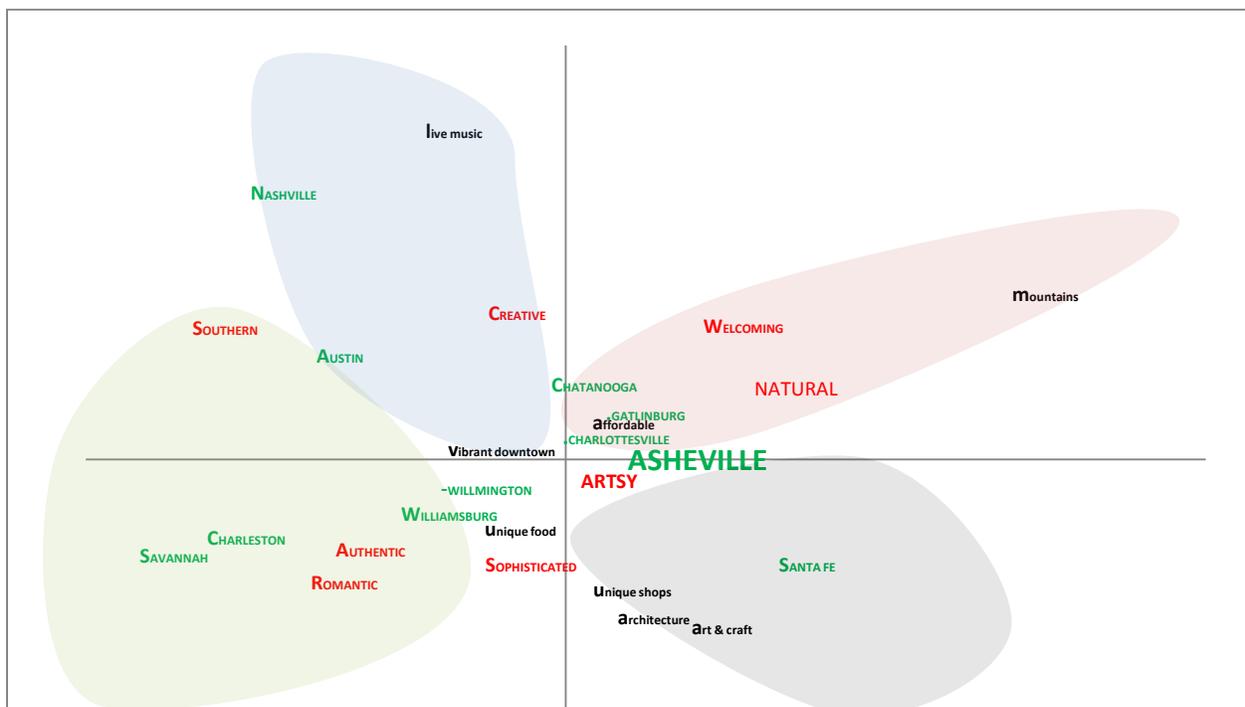
In fact, Asheville’s tourism product may be framed by the beautiful mountains, but inside this frame is a tourism product that is so eclectic as to be difficult to promote in a concise manner. The current approach is to embrace this eclecticism by using the slogan “Any way you like it.” This can work as a slogan – but it doesn’t clearly communicate a point of differentiation – or a way to communicate that Asheville is a better option than key competitors. The drivers offer a few options for focus – the downtown, nationally known attractions, and festivals and events. And, of course, the mountain scenery is the defining characteristic of the city and needs to be promoted. A further layer of consideration is how the personalities of the different destinations influence consideration.

Image Considerations

The challenge with all the data reviewed up to this point is that in reality, in the minds of potential travelers, all this imagery and the competitive context need to be considered together. We need to view strengths and weaknesses and motivational drivers along with image differentiators. The key to branding is not merely a function of promoting a destination's assets, but viewing them in a holistic way that defines the appeal and what makes it special. Unfortunately, no list of attributes and their comparative ratings can fully capture these issues.

It is for this reason that *perceptual mapping* is often employed. A perceptual map provides a visual interpretation of how the target audience perceives the competitor cities relative to one another. The map shows how the various image attributes group together, providing a framework for understanding how the target audience differentiates the cities. Attributes near each other are seen as similar on the relevant dimensions by the traveler. The competitive landscape or *space* is defined by all the interrelationships of attributes, personality and destinations.

One of the biggest assets that Asheville has is the richness of the product and the multiplicity of its appeal. But at the same time this is a challenge for positioning, marketing communications, differentiation, and the image research process. All of this can be seen to some extent by looking at the perceptual map below, which was created using all the attributes, competitors and personality statements. It is presented utilizing a subset of these, which are the key image drivers of the competitive landscape.



This effort, which combines all the different image considerations, clearly illustrates that there are but a few types of image perceptions of these destinations. Savannah and Charleston are charming romantic

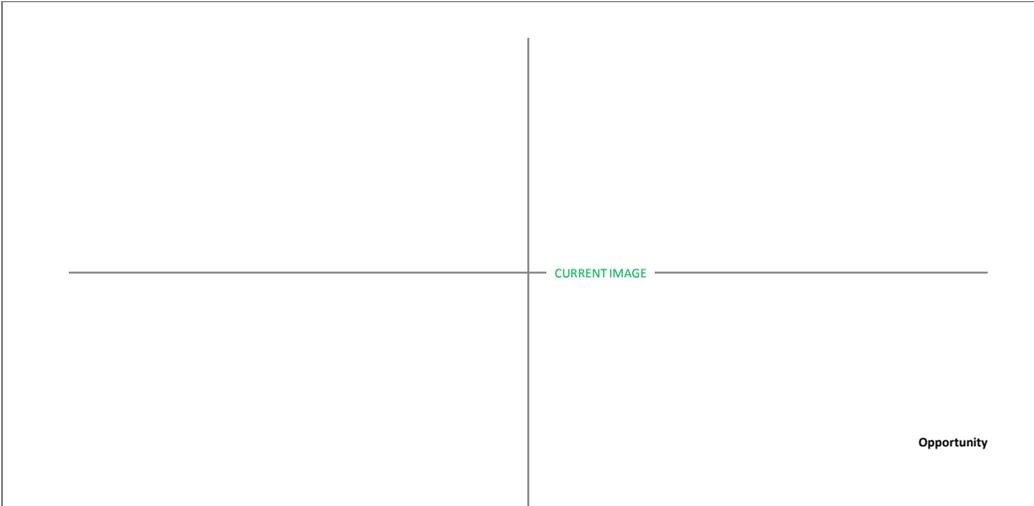
southern towns. Austin and Nashville’s imagery is driven by music and associated creativity. Santa Fe is an arts and crafts driven mountain town. And Chattanooga, Gatlinburg, Charlottesville and Asheville all are similarly perceived as welcoming mountain destinations.

Of course, we have already seen that Asheville’s image is mountains. But clearly mountains alone aren’t differentiating. The issue isn’t simply what can we do but rather, what should we do to have a unique position that we can *own*. The opportunity in the competitive space appears to be in the lower right portion – toward the area occupied by Santa Fe. The opportunity may be to be a mountain town with arts and local shops and restaurants. These are clearly assets of the community and could be a positioning option worthy of consideration.

Often the appeal of alternative positioning approaches can be assessed through a review of the variance in the city’s image by those most familiar, or likely to visit or likely to rate well. Unfortunately, the diversity of strengths the destination has makes these appeals multifaceted and the resultant image does not move. In other words, a diverse product and target and appeal can often lead to the conclusion that the destination has something for everyone. This has been the theme line – *any way you like it*. But there is not a strong position or product benefit offered there – it just promises that there is variety. A strong approach to the same issue may be in order, but more action oriented. For example, **Experience Asheville** captures the multiplicity along with the promise that there is something extra. This coupled with a skew toward the unique artsy Santa Fe brand could serve to differentiate.

The question remains, if the lower right area of the perceptual map were to be selected as the differentiating opportunity, what particular image levels need to be pulled to yield that result. The map below shows what happens to the image of Asheville when the perceptions on five key attributes are raised to a rating of 4.0.

- Offers unique, local food experiences**
- Shopping at unique independent shops**
- Lots of local art and handicrafts**
- Interesting architecture**
- Artsy**



Descriptive Statements' Impact on Interest

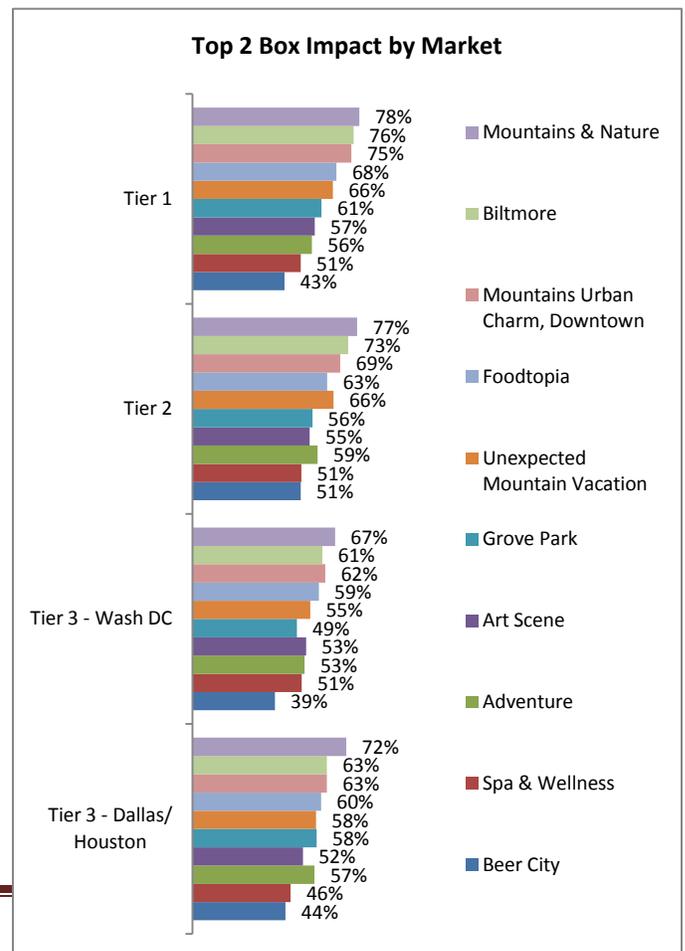
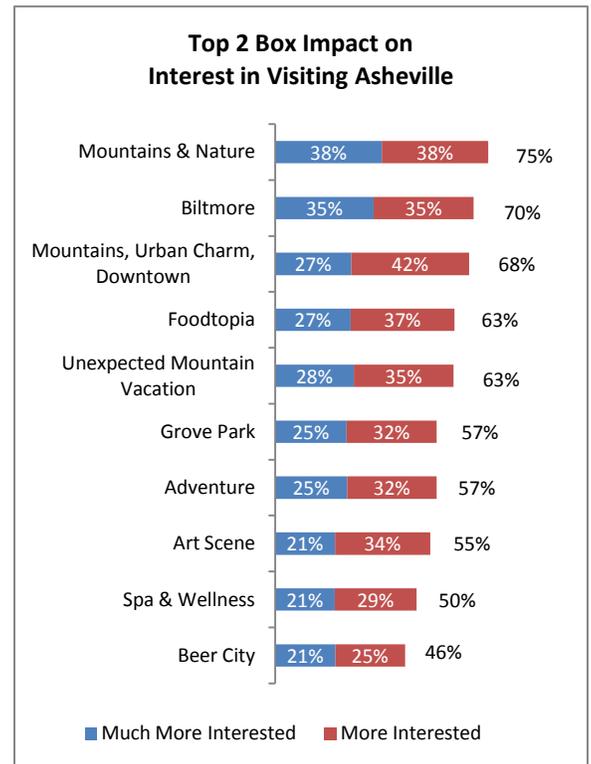
Respondents were asked to indicate to what degree a series of specific descriptive statements would impact their interest in visiting Asheville. A total of eight descriptive statements plus Biltmore and Grove Park Inn were tested for their motivating power from this evaluative perspective. This exercise can identify impactful marketing messages by providing a further understanding of Asheville's current image and travel motivators and uncovering untapped motivating messages.

"Mountains & Nature" is the statement that has the greatest impact on interest in visiting Asheville. This statement in its entirety is:

"Enjoy the majestic mountains of Asheville and its awe-inspiring views. Listen to the chatter of birds as you relish endless views from the highest ridgelines this side of the Mississippi River or enjoy a picnic along the Blue Ridge Parkway, America's most scenic drive. Soak up the sounds and smells of dense life-filled forests, find roadside waterfalls, pick wild blackberries and wade in shallow rivers."

The Biltmore Estate and the "Mountains, Urban Charm, Downtown" statement have the next greatest impact on interest in visiting Asheville. As reviewed, Asheville's current image is defined by mountains and Biltmore. It is not surprising that the attractions that define the area are also likely to generate interest in visiting the area. These attractions should certainly be used in marketing messaging. Plus, the top three motivators do not vary by market.

Yet, the perceptual mapping exercise indicated that while the mountains are a key element of Asheville's image, too strong a focus can actually be detrimental. The motivating power of the "Mountains, Urban Charm, Downtown" statement suggests an opportunity for messaging beyond



current core attractions. This statement in its entirety is:

“Enrich your life as you come to Asheville to soak up some local color. A place where mountain charm mingles with urban sophistication, Asheville's historic downtown is full of energy and activity. Sidewalk cafes, a vibrant music scene and lively street performers, boutique shopping and a drum circle like no other beckon visitors for an unforgettable adventure.”

This statement could support an effort to position Asheville as more artsy and highlights the unique shops, arts and crafts and architecture. The best answer may be a hybrid of these two statements – one that focuses on the mountains and Biltmore, while highlighting an increased focus on urban and artsy.

In terms of the other options that were tested, all of them had a significant impact in terms of increasing interest. “Foodtopia” certainly seems to have a significant impact and can be used to help promote the destination. The focus on “Beer City” had the least appeal, and therefore this should be considered as a niche promotion. It certainly can be meaningful to a specific audience, but it is not as strong as other options.

This information provides insight into how Asheville might position itself to increase visitation. One positive finding is that Asheville is a diverse product and that there are multiple different appeals – and that several of them are feasible. In addition to providing insight into overall positioning, these findings suggest that there are viable options for specific promotions aimed at different audiences and different times of year.

Given this situation, another consideration should be targeting – who is the target for these efforts, and how does that impact the choice of the message? To address this the next step is to consider targeting in terms of both geography and the type of traveler that provides the most opportunity.

Targeting

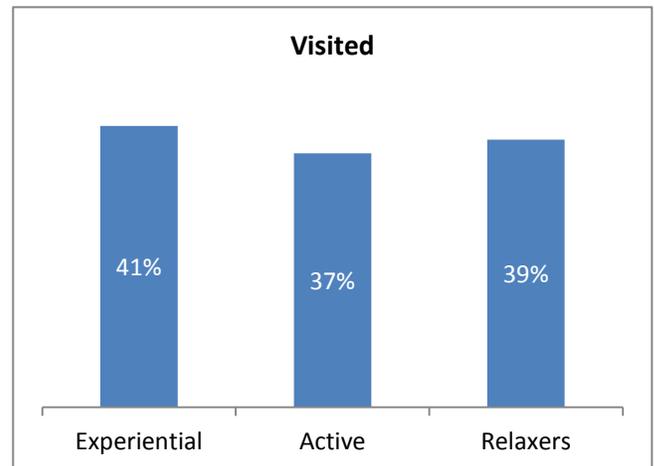
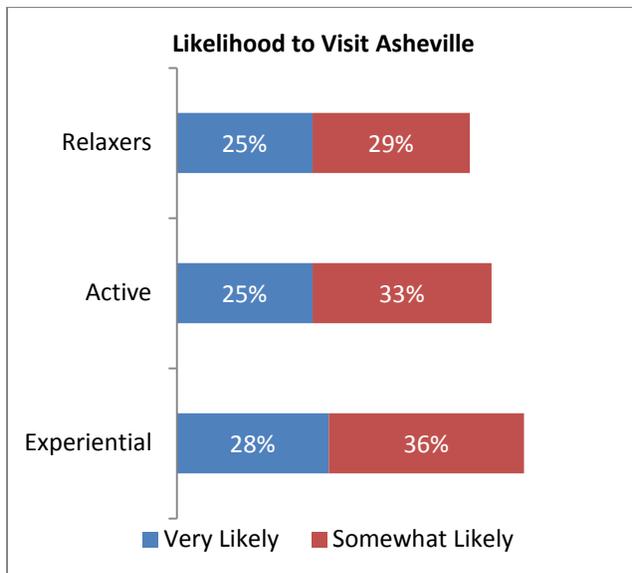
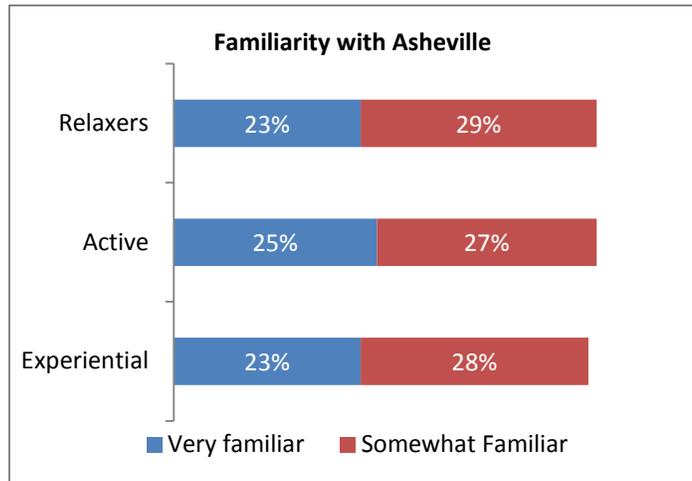
There are various ways that a destination can target potential visitors – and the targeting selected will influence decisions about messaging and positioning. One option is targeting based on travel preferences. This report explored a segmentation based on preferences and motivations for travel and identified three key groups of travelers: Experiential, Active and Relaxers.

A review of these segments in terms of their familiarity and visitation to Asheville suggests that they are, in fact, quite similar. Across the segments about a quarter indicate they are very familiar, with more than half indicating some level of familiarity.

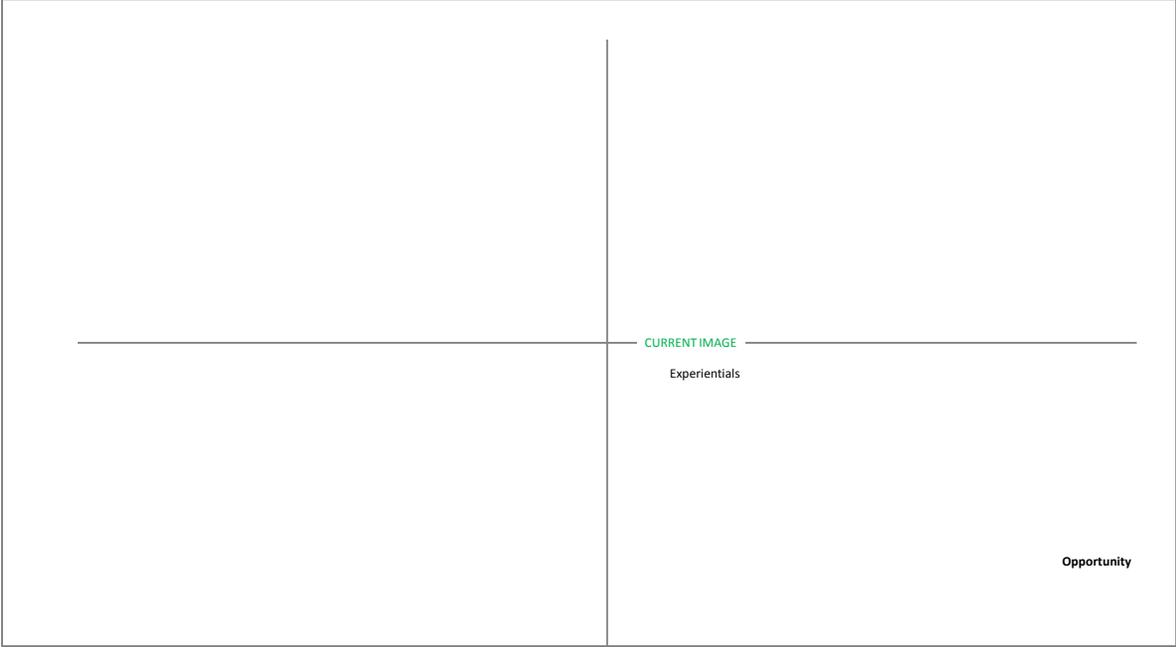
Experientials indicate slightly higher levels of visitation – but all three groups report fairly high levels of visitation to Asheville.

When likelihood to visit is considered, the Experientials are more interested, although all three groups are fairly positive.

These findings suggest that each of the groups could be a good target – although the Experiential segment has slightly more potential.



Interestingly, while little movement in the brand’s image was seen on the perceptual map when likelihood and familiarity were considered, we do see some movement when we look at the target appeals of different types of travelers. In fact, the perception of Asheville by the Experiential group shows a skew toward the Santa Fe position that was suggested earlier, as shown on the map below.



In terms of their view of Asheville and the key drivers, the Experiential travelers are generally quite positive. This suggests that they will be easier to motivate to travel.

Attribute	Experiential	Active	Relaxers
Its appeal as a place to go for couples/adults	103	98	99
A fun place to visit	103	99	97
Lots to see and do	103	99	98
Festivals and events	104	100	96
Nationally known attractions	103	99	99
Vibrant downtown district	103	100	97

This group is also more positive when the specific positioning attributes are considered. They already tend to view Asheville as being more differentiated in these areas.

Attribute	Experiential	Active	Relaxers
Artsy	105	99	96
Unique independent shops	104	99	98
Interesting architecture	105	98	97
Lots of local arts and handicrafts	105	99	96
Offers unique local food experiences	103	98	98

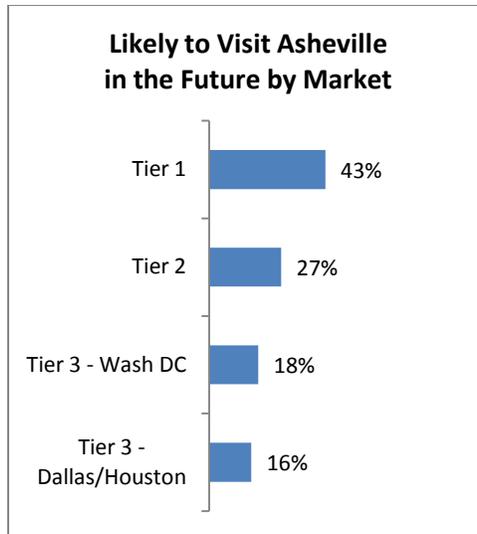
The final factor that suggests this is that they are more receptive to the multiple appeals that Asheville has to offer – and their level of interest indexes higher in almost every category.

Marketing Appeal	Experiential	Active	Relaxers
Foodtopia	105	98	97
Arts scene	106	98	96
Outdoor adventure	99	107	94
Craft beer	101	102	97
Spa	100	100	99
Mountains	103	100	97
Surprising Asheville	102	99	99
Mountain charm & urban sophistication	104	97	98
Biltmore	105	97	99
Grove Park Inn	103	99	98

In addition to considering who to target and the best positioning and messaging, Asheville is also considering geographic targeting issues. This study attempted to gather information from different market groups to provide input into this process. At the same time, image and interest are only two aspects that need to be considered when choosing geographic markets. Access is key for geographic targeting – and two destinations can be the same distance away, but the roads make it much easier to get to Asheville from one destination versus another. Flights are another consideration – especially as more distant markets are considered.

The location of the competitive set can also have an influence – do people have to drive by a key competitor to get to Asheville? This can make a market less successful. Plus, the media costs and availability are of critical importance – a market might make sense in terms of potential but be too expensive for effective marketing. This also depends upon the type of media – a print campaign can usually be bought on a regional basis, which allows targeting of multiple cities/markets, while a television campaign often has to be more targeted.

This research can provide some information to guide the selection of geographic markets. As mentioned before, respondents were asked to indicate how likely they were to visit Asheville in the future. Likelihood was strong in the Tier 1 markets, where Asheville has been advertising. Likelihood decreases in the other market areas – with distance and familiarity. Familiarity is important, as even where there is interest, markets may take more time to mature if familiarity is low.



Of course, the market areas that were considered vary in population – so simply looking at the likelihood information doesn’t provide insight into the relative potential of the different groups of markets. Of course, the level of likelihood measured in a survey should be considered with some care – and in this case the numbers utilize the 80/20 calculation that 80% of those saying they are very likely will follow through along with 20% of those who are somewhat likely. This provides a way to compare the relative potential of the different geographic areas. This suggests that the strongest potential is among the current core markets – which makes sense and reinforces the strength of the current marketing efforts.

Market	HHs	Likelihood	Potential
Tier 1	5.6 million	43%	2.4 million
Tier 2	8.6 million	27%	2.3 million
Washington, DC	2.5 million	18%	450,000
Dallas/Houston	5 million	16%	780,000

However, there is almost as much potential among the Tier 2 markets. Of course, the challenge with Tier 2 markets is that it consists of 10 specific DMAs – and it might not be possible to target all of them. In this case, the potential of the Tier 2 markets needs to be considered more specifically. This is also the case for the Texas markets – which combine Dallas and Houston. Therefore, an effort was made to look at these findings more specifically (as the sample size allowed) and explore the relative potential of different geographic targeting decisions.

The findings are quite interesting – although they don’t necessarily provide clear direction. Tennessee markets provide the most potential – Nashville, Chattanooga and Knoxville. If it is possible to buy these three markets together, they represent a good option. But if they have to be targeted separately, they will provide less potential.

After that, Washington, DC, seems to offer the most potential, but Houston, Dallas or Tampa could generate almost as much travel. The positive news is that Asheville does seem to have national appeal – and even in distant markets there is a fairly high level of existing interest.

The next step would be an evaluation of messaging, advertising and media to help identify the market or markets where Asheville can maximize its efficiency and reach – and thereby have the best option for increasing interest and visitation.

Markets	HHs	Likelihood	Potential
South Carolina Markets	750,000	44%	330,000
Ohio/Kentucky Markets	1.1 million	27%	290,000
Tennessee Markets	2.4 million	29%	710,000
Orlando	1.5 million	22%	330,000
Tampa	1.9 million	21%	390,000
Washington, DC	2.5 million	18%	450,000
Houston	2.3 million	18%	410,000
Dallas	2.7 million	14%	380,000

Recommendations

This research effort covered many topics and provides an in-depth look at Asheville's current image and competitive position. The findings indicate that past advertising in core markets has supported strong interest in visitation from these markets. Outside of those core markets, there is interest, but familiarity drops fairly significantly. So while Asheville has a generally positive image outside the core markets, the image is "thin" and not very well developed.

Currently, key marketing pillars are mountain scenery and the Biltmore. These are what people are most likely to know about the area and these generate the strongest increase in interest. These pillars need to be the backbone of the marketing message.

But these are not enough to create a strong competitive differentiation. If the marketing only promotes mountain scenery and the Biltmore Estate, it will be difficult to increase visitation significantly. Most consumers are less aware of the nuances that can define Asheville – the art, local food experiences, the architecture. These can create a point of differentiation and position Asheville to be more competitive and appealing.

The specific attributes and personality to address are:

- Offers unique, local food experiences**
- Shopping at unique independent shops**
- Lots of local art and handicrafts**
- Interesting architecture**
- Artsy**

The statement that best generates interest and moves in the right direction is:

Enrich your life as you come to Asheville to soak up some local color. A place where mountain charm mingles with urban sophistication, Asheville's historic downtown is full of energy and activity. Sidewalk cafes, a vibrant music scene and lively street performers, boutique shopping and a drum circle like no other beckon visitors for an unforgettable adventure.

This statement can provide the starting point to refine the message that focuses on what Asheville has and is well known for (mountain scenery and Biltmore) but also communicates that the area offers a more unique local, artsy vibe.

At the same time, one of the key drivers of increase interest in visitation is that the area offers lots to see and do. The key is to communicate variety and activity, without losing a distinct personality. The challenge is that many of the other appeals – Foodtopia, outdoor adventure, art – can generate interest. The key is to create an over-arching platform to position Asheville and then specific promotions that are used to reinforce the overall message.

In developing future marketing programs – and the positioning for the area – Asheville should target those seeking an Experiential type of trip. This group has a stronger interest in the area already and is more willing to consider visiting. The suggested positioning will work well with this segment; because they like different types of experiences, they are more likely to consider repeat visits to the area to enjoy the wealth of opportunities such as food, art, craft beer, spas & healing after experiencing the mountains and touring Biltmore.

In terms of geographic markets, Asheville should continue its focus on established core markets, as these still represent good targets and can generate strong visitation/repeat visitation. In terms of expanded markets, there are several viable options and these should be evaluated based on factors such as access and marketing opportunities/efficiencies.

The long-term plan should realize that Asheville has wide appeal and that the market can be expanded over time to be more national. But, while there is interest in more distant markets, there is currently fairly low familiarity. It will take marketing dollars to “educate” consumers in these more distant markets about what Asheville has to offer and then convert them to actual visitors.

Appendix – Questionnaire

Asheville Convention & Visitors Bureau

Brand Assessment Questionnaire

Final - January 27, 2013

Thank you for visiting our travel survey. Your opinions are valuable to us! We are interviewing people concerning their travel and vacationing choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before we begin, there are a few things to note about our survey:

- For most questions, simply click on the button of your response and then click on the *next* button to go on to the next question.
- If you need to go back to the preceding question to change your response, click on the *previous* button.
- For some questions, you will need to scroll down to respond to all the questions on a screen.
- To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. What is your ZIP code? _____

S2. In the past year, how many overnight leisure business trips have you taken? [_____] → IF 0, TERMINATE AFTER ALL SCREENING QUESTIONS

S3. Who in your household is primarily responsible for making decisions concerning travel destinations?

- Myself
- Jointly with my spouse or partner
- My spouse or partner → TERMINATE AFTER ALL SCREENING QUESTIONS

1. First I'd like to ask you about past overnight leisure trips. There are several reasons that a trip can be enjoyable such as the people you go with, or a special occasion or event. ***But some trips are special because of the destination itself.*** Focusing on the destination, and thinking about those overnight leisure destinations that you have visited over the last several years, which one destination do you like best as a place to visit?

2. Why is this the place you like best for a leisure trip?

3. Thinking about when you travel for pleasure. How often do you or someone you are traveling with participate in each of the following activities on your leisure trips?

	Never	Seldom	Often	Always
Outdoor recreation such as hiking, camping or biking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting cities and urban areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural activities such as museums and the performing arts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting a spa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping at a mall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evening entertainment and nightlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Experiencing the unique culture of the area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gambling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting a place to enjoy the great food scene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exploring small towns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping in a downtown or neighborhood district (not a mall)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting microbreweries and the local craft beer scene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taking scenic drives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boating or other water-based activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Going to the beach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participating in activities that are fun for young children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoying downtown vitality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeing interesting architecture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exploring greenways	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sightseeing or taking tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting historic sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attending special events and festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hunting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Winter sports, such as cross country skiing and snowshoeing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snowmobiling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting well known attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wildlife viewing (including birding)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motorcycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Listening to live music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting art galleries, or art districts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. We are interested in your attitudes about a number of travel preferences. There are no right or wrong answers. Please indicate how much each statement is like you by checking the box that comes closest to how well the statement describes you. (Please select one answer for each statement.) **(ROTATE)**

	Not at all like me (1)	Not much like me (2)	Somewhat like me (3)	Quite a lot like me (4)	Just like me (5)
I enjoy trying new/adventurous activities or attractions first hand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like to try lots of new and different things that are unique to a destination.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy learning about and experiencing different cultures when I travel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

My favorite activities are typically outdoors and involve some challenge	<input type="radio"/>				
My favorite thing about a vacation is the opportunity to just kick back and do as little as possible.	<input type="radio"/>				
When I visit a new destination I want to immerse myself in the culture and get to know the people.	<input type="radio"/>				
I love to sight see and experience all a destination has to offer.	<input type="radio"/>				
I am interested in learning about the history and culture of the people of a destination.	<input type="radio"/>				
I prefer visiting places I have never visited	<input type="radio"/>				
I frequently choose activities that are physically active	<input type="radio"/>				
I'm happy to do very little sightseeing on my vacations	<input type="radio"/>				
The best vacation is restful without too much physical activity	<input type="radio"/>				
I prefer being led by a guide rather than self-guided exploration	<input type="radio"/>				
I like to go places with beautiful mountain scenery	<input type="radio"/>				
I like to go places with beautiful coastal scenery	<input type="radio"/>				
I like to go places that have some type of spiritual energy	<input type="radio"/>				
I like to be the first among my friends and family to try out new places to visit	<input type="radio"/>				
5. I like to go to places that other people dream about going	<input type="radio"/>				

When you are taking a leisure vacation or getaway, which of the following type of lodging are you most likely to choose?

Luxury resort hotel	
High-end full service hotel	
Mid-level hotel	
Budget hotel or motel	
Bed and Breakfast	
Timeshare	
Cabin	
Campground	
Vacation Home Rental	

6. [USE COLLAGE MODULE – Please drag the words and images that would be part of your ideal U.S. vacation onto the collage board on the right of your screen. (INCLUDE IMAGES FROM ASHVILLE FOR COLLAGING)

6a. (Once collage is finished) Now what three words describe this collage and your ideal vacation? _____

7. Now I want to explore your attitudes towards several specific destinations with which you may or may not be familiar. How familiar are you with the following in terms of what they have to offer as a destination for a leisure trip?

(RANDOMIZE ORDER)	Very familiar	Somewhat familiar	Not very familiar	Not at all familiar
Asheville, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Austin, Texas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nashville, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Savannah, Georgia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chattanooga, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gatlinburg, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charleston, South Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Santa Fe, New Mexico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Williamsburg, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wilmington, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charlottesville, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Which of these destinations have you ever visited?

9. **(OF THOSE MENTIONED)** Which have you visited in the last 2 years?

	Q7	Q8
Asheville, North Carolina	<input type="radio"/>	<input type="radio"/>
Austin, Texas	<input type="radio"/>	<input type="radio"/>
Nashville, Tennessee	<input type="radio"/>	<input type="radio"/>
Savannah, Georgia	<input type="radio"/>	<input type="radio"/>
Chattanooga, Tennessee	<input type="radio"/>	<input type="radio"/>
Gatlinburg, Tennessee	<input type="radio"/>	<input type="radio"/>
Charleston, South Carolina	<input type="radio"/>	<input type="radio"/>
Santa Fe, New Mexico	<input type="radio"/>	<input type="radio"/>
Williamsburg, Virginia	<input type="radio"/>	<input type="radio"/>
Wilmington, North Carolina	<input type="radio"/>	<input type="radio"/>
Charlottesville, Virginia	<input type="radio"/>	<input type="radio"/>

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

(RANDOMIZE ORDER)	Excellent	Good	Fair	Poor
Asheville, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Austin, Texas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nashville, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Savannah, Georgia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chattanooga, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gatlinburg, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charleston, South Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Santa Fe, New Mexico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Williamsburg, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wilmington, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charlottesville, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. How likely are you to visit each of these destinations for a future leisure trip?

(RANDOMIZE ORDER)	Very likely	Somewhat likely	Not very likely	Not at all likely
Asheville, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Austin, Texas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nashville, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Savannah, Georgia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chattanooga, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gatlinburg, Tennessee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charleston, South Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Santa Fe, New Mexico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Williamsburg, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wilmington, North Carolina	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charlottesville, Virginia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. (FOR ASHEVILLE AND ONE OTHER WHICH IS OF SAME FAMILIARITY ASK Q10 AND Q11). Two of these destinations have been selected for further explanation. First, when you think of (DESTINATION) what comes to mind?

13. Please rate (DESTINATION) on each of the following areas using a scale of 1 to 5, where a "1" means "poor" and a "5" means "excellent." Please use any number from 1 to 5.

RANDOMIZE LIST

	Poor				Excellent
Friendly people	1	2	3	4	5
Good value for the money	1	2	3	4	5
Its appeal as a family destination	1	2	3	4	5
Its appeal as a place to go for couples/adults	1	2	3	4	5
Festivals and events	1	2	3	4	5
Offers unique, local food experiences	1	2	3	4	5
Historic sites and landmarks	1	2	3	4	5
Shopping at unique independent shops	1	2	3	4	5
Activities for children	1	2	3	4	5
Live theater	1	2	3	4	5
Live music and concerts	1	2	3	4	5
A fun place to visit	1	2	3	4	5
Comfortable and safe	1	2	3	4	5
Shopping well known stores	1	2	3	4	5
Ways to take in the outdoors like trails or parks	1	2	3	4	5
Great local Dining	1	2	3	4	5
Environmentally friendly community	1	2	3	4	5
Lots to see and do	1	2	3	4	5
Affordable accommodations	1	2	3	4	5
Vibrant downtown district	1	2	3	4	5
Dining at well known chain restaurants	1	2	3	4	5
Lots of local art and handicrafts	1	2	3	4	5
Nationally known attractions	1	2	3	4	5
Beautiful scenery	1	2	3	4	5
Interesting architecture	1	2	3	4	5

Natural beauty of mountains	1	2	3	4	5
Upscale accommodations	1	2	3	4	5
Challenging outdoor activities like rafting, climbing or zip lines	1	2	3	4	5
Easy to get to	1	2	3	4	5
Easy to get around once you're there	1	2	3	4	5
Sporting events and activities	1	2	3	4	5
Beautiful scenery	1	2	3	4	5
A unique culture	1	2	3	4	5
Spas or pampering activities	1	2	3	4	5
Must see attractions	1	2	3	4	5

14. Destinations also have different personalities. Please indicate how much each of the following words describes (Destination)

RANDOMIZE LIST

	Does not describe				Totally describes
Vibrant	1	2	3	4	5
Artsy	1	2	3	4	5
Sophisticated	1	2	3	4	5
Relaxed	1	2	3	4	5
Adventurous	1	2	3	4	5
Spiritual	1	2	3	4	5
Romantic	1	2	3	4	5
Southern	1	2	3	4	5
Welcoming	1	2	3	4	5
Young	1	2	3	4	5
Progressive	1	2	3	4	5
Independent	1	2	3	4	5
Creative	1	2	3	4	5
Safe	1	2	3	4	5
Formal	1	2	3	4	5
Authentic	1	2	3	4	5
Natural	1	2	3	4	5

15. Consider each of the following descriptions and indicate how it impacts your interest in visiting Asheville. (ROTATE)

	Makes me less interested in visiting		Has no impact	Makes me much more interested in visiting	
Discover the world's only Foodtopian Society, Asheville, N.C. It's a place where incredible food fuels everything from soul-stirring conversation to social change. With a bounty of sumptuously natural produce, farmers markets, independent restaurants and local breweries, Asheville is a culinary paradise where you can indulge your passion for food while feeding your hungry spirit. Get a taste of transcendence.	1	2	3	4	5
The Asheville arts scene is buzzing, featuring hundreds of fine artists, performing arts venues, mountain crafters, folk artists, hip arts neighborhoods, numerous art galleries and myriads of art events.	1	2	3	4	5
Nestled among the highest mountain peaks in the East, Asheville is your base camp for adventure. Here you'll find	1	2	3	4	5

some of the best whitewater rafting in the East, numerous mountain biking trails and more than 2000 miles of hiking trails. You can even glide through the forest canopy like a bird via some of the most exciting zip lines in the nation.					
Asheville is the craft-brewing center of the Southeast and was named the winner of the Beer City USA poll for four years running. With more breweries per capita than any US city, on any given day about 50 local beers can be enjoyed. A dozen microbreweries that craft and serve their own brand of local beer are complemented by several beer festivals and several brews cruises around town.	1	2	3	4	5
The Asheville area's reputation as a destination for spa treatments and wellness dates back centuries. One of the East Coast's only natural hot spring water sources, in Hot Springs, has been attracting visitors since its discovery in the 1700s. The area has evolved into a major spa destination.	1	2	3	4	5
Enjoy the majestic mountains of Asheville and its awe-inspiring views. Listen to the chatter of birds as you relish endless views from the highest ridgelines this side of the Mississippi River or enjoy a picnic along the Blue Ridge Parkway, America's most scenic drive. Soak up the sounds and smells of dense life-filled forests, find roadside waterfalls, pick wild blackberries and wade in shallow rivers.	1	2	3	4	5
This is no ordinary mountain vacation. In Asheville, surprises wait around every corner. Discover a destination with a style and rhythm all its own. Unusual, unexpected, unscripted – unlike any place on Earth.	1	2	3	4	5
Enrich your life as you come to Asheville to soak up some local color. A place where mountain charm mingles with urban sophistication, Asheville's historic downtown is full of energy and activity. Sidewalk cafes, a vibrant music scene and lively street performers, boutique shopping and a drum circle like no other beckon visitors for an unforgettable adventure.	1	2	3	4	5

16. Are you aware that Biltmore, which includes America's largest house the Biltmore Estate, as well as the gardens, winery and village is located in Asheville North Carolina?
- Yes
 No
17. Are you aware that the hundred year old, historic resort hotel, the Grove Park Inn is located in Asheville North Carolina?
- Yes
 No
18. How much does the fact that each of these properties is located in Asheville increase your interest in visiting the area?

	Makes me less interested in visiting		Has no impact		Makes me much more interested in visiting
Biltmore	1	2	3	4	5
Grove Park Inn	1	2	3	4	5

DEMOGRAPHICS

These last few questions are for classification purposes only.

19. Are you...

- Married/With partner 1
- Single (never married) 2
- Divorced 3
- Widowed 4

20. Including yourself, how many people are currently living in your household?

- SKIP TO Q15---> ONE 1
- TWO 2
- THREE 3
- FOUR 4
- FIVE OR MORE 5

21. How many children under the age of 18 live in your household? ____

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

- HIGH SCHOOL GRADUATE OR LESS 1
- SOME COLLEGE OR TECHNICAL SCHOOL 2
- COLLEGE GRADUATE 3
- GRADUATE WORK/ADVANCED DEGREE 4

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

- Less than \$25,000 1
- \$25,000 but less than \$50,000 2
- \$50,000 but less than \$75,000 3
- \$75,000 but less than \$100,000 4
- \$100,000 but less than \$150,000 5
- \$150,000 but less than \$250,000 6
- \$250,000 or more000 7

24. What is your age? _____.

25. Are you Male
 Female