



D.K. Shifflet & Associates Ltd.

Excellence in Travel Intelligence®

2014 ASHEVILLE VISITOR PROFILE

Executive Summary

Charts & Graphs

Appendix

Year-End 2014 Visitor Profile.

*An Inside Look at the Overnight Leisure
Travel Market in Asheville, NC*

D. K. Shifflet & Associates, Ltd.
1750 Old Meadow Rd, Suite 620
McLean, Virginia 22102

Tel.: +1.703.536.8500
www.dksa.com



Sindy Köhler
Research Manager

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Table of Contents

4	●	Executive Summary
16	●	Charts & Graphs
17		Market Share
18		Demographics
32		Trip Origin
48		Transportation
41		Trip Timing
48		Trip Characteristics
60		Activity Participation
67		Accommodation
70		Performance Ratings
71	●	Appendix

Executive Summary

This report compares Asheville's Overnight Leisure traveler market during 2012-2014 to the average US traveler.

While Asheville's travel industry reported a strong time period compared to prior time periods, the destination consistently attracts its key market segments and offers cultural and culinary-based activities that provide travelers reasons to visit; especially couples

consisting of One Male/ One Female.

The executive summary provides a comprehensive analysis of all key segments that dominate the mass market in Asheville and are **customers** with a high share in visitation in 2012-2014 that deserve attention. The following highlights will help travel marketers in Asheville continue the path of growth:

- Age: mature travelers, Boomers generation
- Income: slightly lower average than the US average; one-third under \$50K
- Lifestages: mature travel parties with any income no children
- Employment: dropped 18 ppt since 2008-2010 and reached US levels; distribution of occupations similar to the US
- Accommodation: majority of overnight travelers stay at paid hotel/motels (Mid-Level and High-End) or stay with Friends/Relatives
- Purpose of Stay: Getaway Weekend, Visit Friends/Relatives, General Vacation, Special Events
- Activity: Historic Sites, Culinary/ Dining Experience, Touring/ Sightseeing, Shopping, Visit Friends/ Relatives, Visit Friends/Relatives, Winery/Distillery/Brewery Tours, Parks, Museums, Art Exhibit etc., Hiking, Nightlife
- Length of Stay: single night stays but more than two nights stays are profitable segments
- Traveling Party: one male/ one female, one adult & travel parties with children present

STUDY SPECIFICATIONS

Travel definition: Overnight Leisure segment defined as any overnight trip for the stay purpose of Leisure.

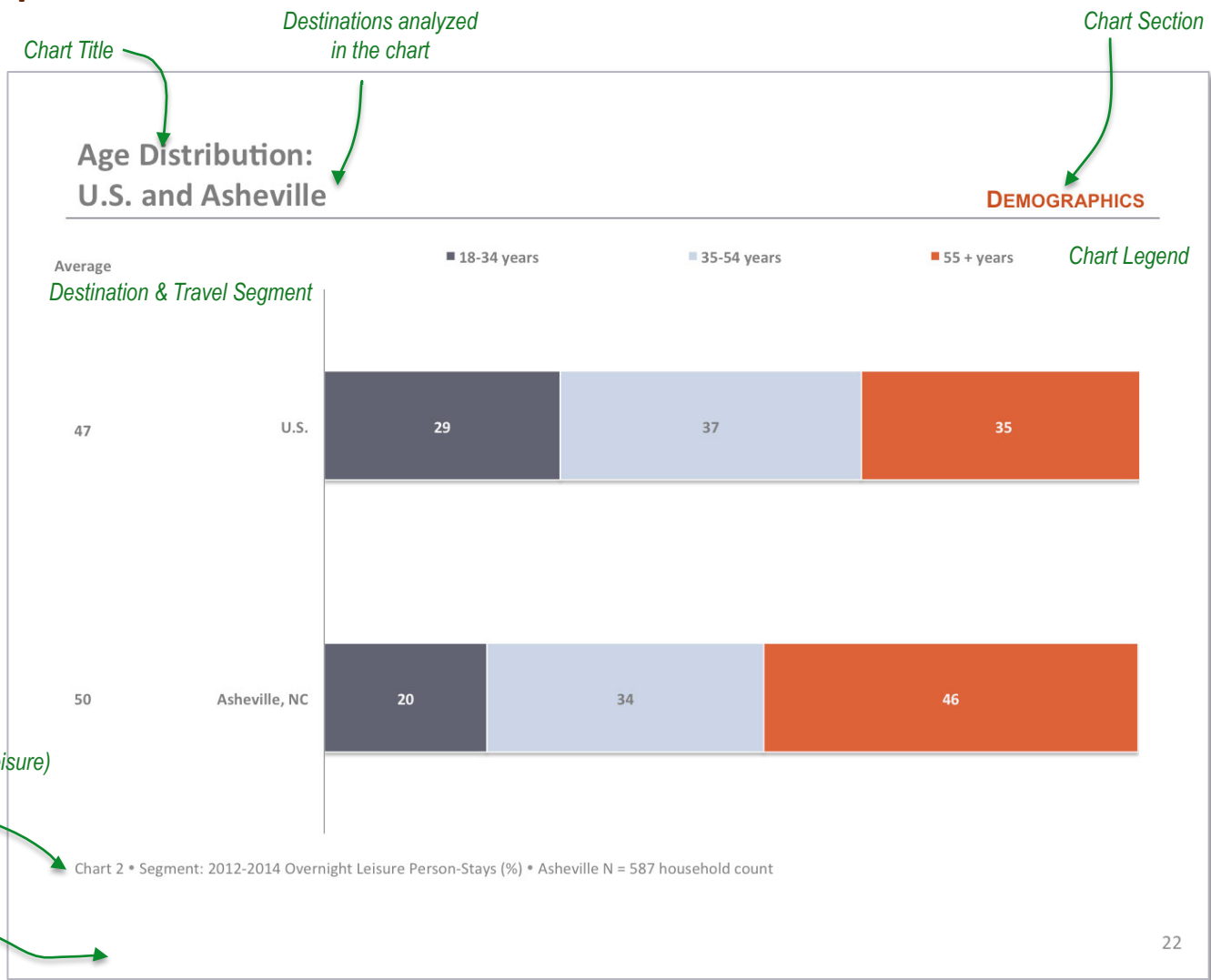
Sample Frame: All U.S. travelers in Asheville, NC defined as Buncombe county.

Timeframe: Travel Years 2012-2014 combined

Executive Summary cont'

- Timing: preferred travel destination from Spring through Fall (with peaks in July, June, September, April)
- Origin: North Carolina primary top Origin State (gradually decreased since 2009-2011); followed by South Carolina and Georgia
 - largest share of visitors arrive from Charlotte, NC DMA, Greenville-Spartanburg, SC-Asheville-NC-Anderson, SC DMA, and Atlanta, GA DMA
 - Asheville's travelers exclusively arrive by auto – traveling 283 miles on average (declined over time)
- Ratings: Asheville received highest Excellent Satisfaction, Value-For-The-Money, Friendly/Helpful People, Feeling of Safety, and Likely to Recommend ratings (higher than the average US destination)
 - Asheville Paid Hotel/Motel industry average Satisfaction, Value-for-the-Money, and Staff Service ratings almost as high as Asheville's destination rating

How to Read the Report Charts



Destination Market Share

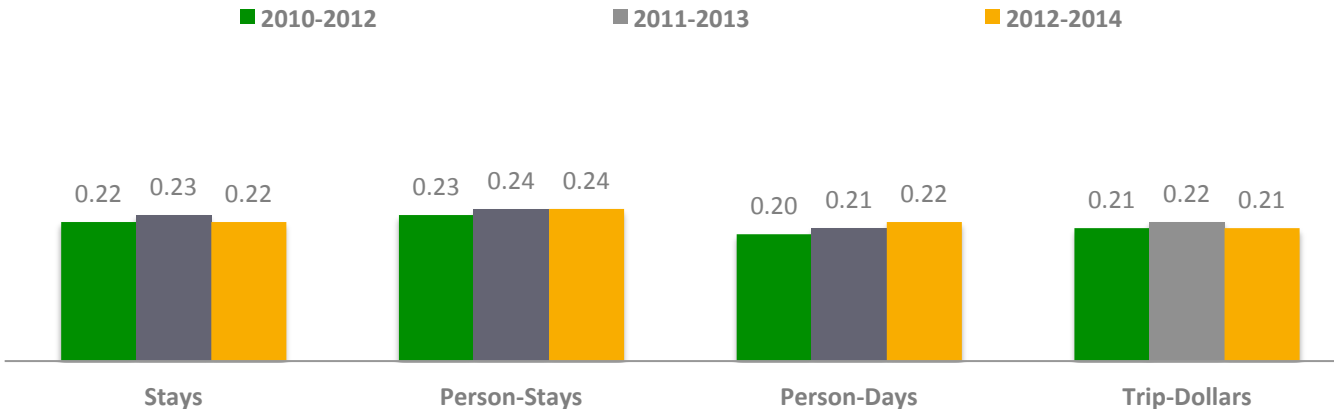
Asheville's Overnight Leisure travel parties (or *Stays*) represent 0.22% of the US Overnight Leisure travel market in 2012-14. People often travel together with family, friends or with other groups. Thus, the Stays metric takes into account how many distinct groups of travelers came to the destination.

Asheville's Overnight Leisure travelers (or *Person-Stays*), the main focus of this report, represent 0.24% of the US Overnight Leisure travel market. Person-Stays indicate how many people came to the

destination, but not how long they stayed. Asheville's Overnight Leisure travelers' share is slightly larger than when measured in travel parties which is a result of either a larger average travel party size than the US (given that the average travel party size remained the same at the National level) or the average travel party size on the US level is smaller than the average travel party size of the Asheville travel market.

Asheville Overnight Leisure Market Share

2012-2014 (%) • ASHEVILLE N = 587 HOUSEHOLD COUNT



Overnight Leisure traveler segment shares of the US travel market highest in Visitors and lowest in Trip-Dollars...a fairly steady trend over the past five time periods

Destination Market Share

Asheville's Overnight Leisure traveler days (or *Person-Days*) represent 0.22% of the US Overnight Leisure travel market. The traveler days metric is simply the total number of days that visitors contributed to Asheville. Again, a just slightly lower share than in Person-Stays which can be attributed to changes in Asheville number of visitors, changes in length of stay of these visitors, changes in party composition shares, and/or changes in the day/ overnight mix relative to the US.

Asheville's Overnight Leisure traveler spending (or *Trip-Dollars*) represent 0.21% of the US Overnight Leisure travel market in 2012-14. Contrary to the contribution of number of trips or number of days

spent in a destination, the Trip-Dollars metric represents the monetary worth of travelers. Changes in Direct Spending can not only be influenced by ALL other travel measures including number of travel parties, number of persons, number of days, number of people in the Stays, length of stay, and individual traveler spending but also be related to changes in travel party composition, purpose of trip, activity participation levels, or accommodation choice.

Who are Asheville's visitors?

- Age, with 3 out of 10 belonging to the 35-54 years old age group
- Race, with 8 out of 10 being White or Caucasian
- Sexual orientation, with 9 out of 10 being heterosexual/straight
- Average Household income of \$85K
- Generation, with 3 out of 10 GenX and 1 out of 10 Silent/GI
- 6 out of 10 are employed
- Almost 5 out of 10 are occupied in a managerial/professional position
- Education, with 2 out of 3 having a college education

How do Asheville visitors compare?

2012-2014	US	Asheville
Average Age	47 years	50 years
Employed	61%	59%
Retired	21%	26%
Median Income (000)	\$72.3	\$74.4
Children in Household	37%	26%
Generations:		
Millennial	25%	18%
GenX	29%	28%
Boomer	35%	43%
Silent/GI	11%	10%

The profile remained much the same in 2012-14 as in 2011-13 with just one statistically significant exceptions:

- Overnight Leisure travelers were somewhat older in 2012-14 due to a smaller share of 35-54 years old and a larger share of 55+ years old.

Source of Visitors – About 76% of Asheville's tourism provided by out-of-state travelers

- North Carolina remained the top source of Asheville's Overnight Leisure visitors, contributing 24% of travelers.
- Another 4 out of 10 visitors come from the Southeast Region, namely the States of South Carolina and Georgia.
- Charlotte DMA (12.6%) provide the greatest proportion of Overnight Leisure visitors to Asheville; the other DMAs are listed to the right.

Mode of Transportation

- 9 out of 10 visitors drove to Asheville with their own or a rental car.
- When in Asheville, Overnight Leisure visitors predominantly use personal vehicles, followed by rental vehicles (1 out of 10).
- On average, Asheville's visitors traveled about 280 miles (one-way).

Trip Planning Sources

- Asheville Overnight Leisure travelers are more likely than the average US Overnight Leisure travelers to:
 - Use various resources when planning the trip (84% used trip planning resources)
 - Online destination visitor guides (12%)
 - Attraction websites (17%)
 - Internet search (33%)
 - Guest ratings & review websites (11%)
 - Friends/family/colleague recommendation (33%)

Asheville Origin DMAs

OVERNIGHT LEISURE PERSON-STAYS 2012-2014 (%)

Charlotte, NC	12.6%
Greenville-Spartanburg, SC-Asheville, NC-Anderson, SC	8.8%
Atlanta, GA	8.2%
Raleigh-Durham, NC	7.3%
Charleston, SC	6.8%
Macon, GA	5.0%
Greensboro-High Point-Winston Salem, NC	2.9%
Philadelphia, PA	2.2%
Nashville, TN	2.2%
Gainesville, FL	2.2%

Travel Planning Time Frame

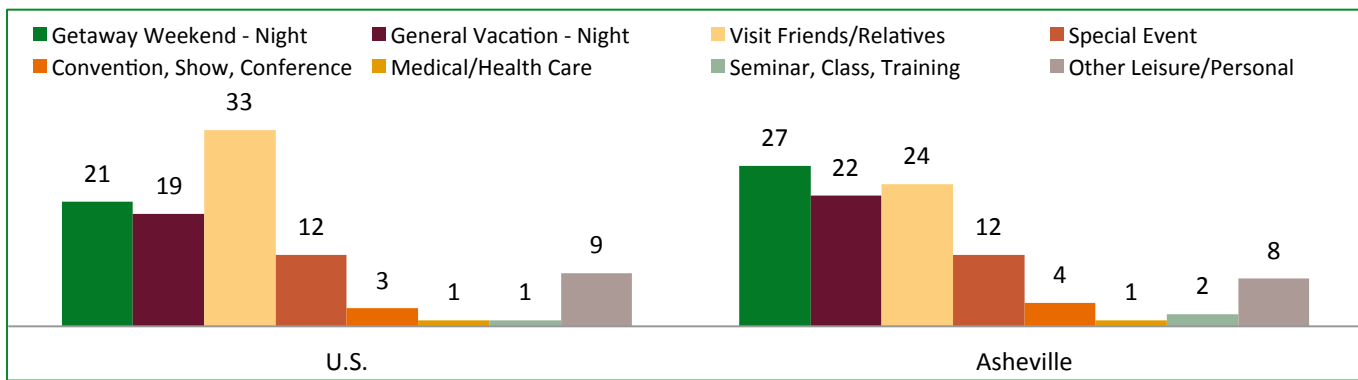
- 3 out of 10 Overnight Leisure travelers plan their trip either 2-3 weeks or 4 weeks before traveling to Asheville – a much higher share than the average US travelers.

Purpose of Travel

- In 2012-14, Asheville welcomes equal shares of travelers for Vacation and Non-Vacation purposes.
- Getaway Weekend travel (27%), Visit Friends/Relatives (24%), and General Vacation (22%) are predominant reasons for travelers to visit Asheville.
- Comparing 2012-14 to 2011-13, there was an increase among travelers Visiting Friends/Relatives and a decrease among Getaway Weekend travelers.
- The average US destination attracts higher shares of travelers who Visit Friends/Relatives and lower shares of Getaway Weekend and General Vacation travelers.

Asheville Purpose of Travel

OVERNIGHT LEISURE PERSON-STAYS 2012-2014 (%)

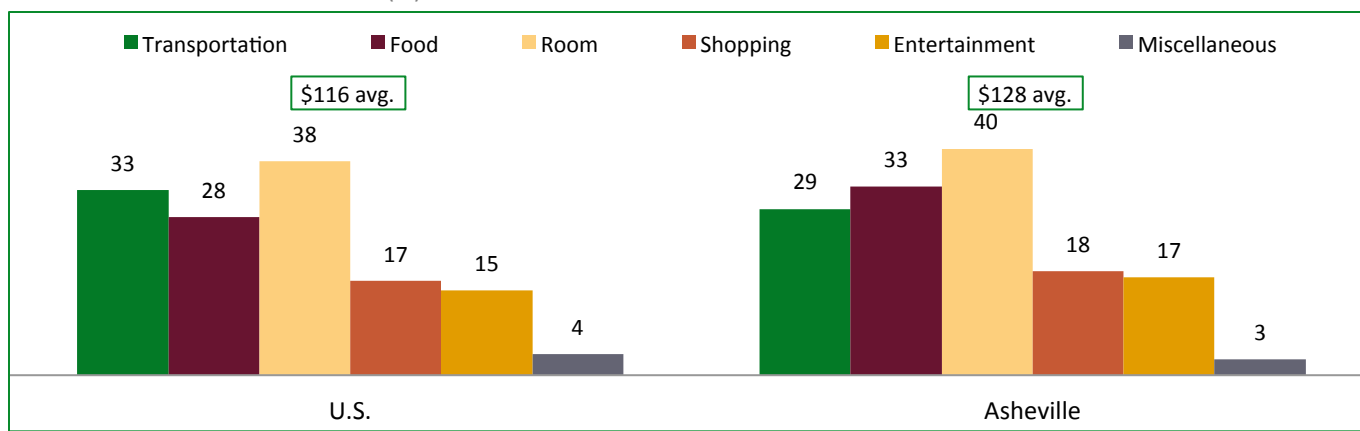


How much do travelers spend on their stay in Asheville?

- Travelers visiting Asheville spent on average \$128 per person per day.
- Travelers visiting the average US destination spent slightly less on average (\$116).
- After steady growth between 2008-10 to 2011-13, the total average daily spending (including transportation) dipped slightly in 2012-14.
- The majority of the daily expenditure was spent on Food & Beverage (26%), Transportation (23%), Lodging (21%), Shopping (14%), Entertainment & Recreation (14%), and Other Expenses (2%).
- Uniquely in 2012 and onwards, the increase over 2012-12 and 2011-13 resulted more from a change in spending calculation than from a surge in transportation and lodging spending (*see footnote below*).

Per-Person-Per-Day-Spending

TOTAL PERSON-DAYS 2012-2014 (%)



2012 SPENDING CALCULATION CHANGES

The improved survey logic (2012+) has eliminated many non-responses for spending which were previously considered as \$0. Where previously, spending was calculated on the entire base of those reporting at least \$1 spent in at least one category, sometimes resulting in lower than expected averages, it is now calculated based on only those respondents reporting spending in a given category. The result of these changes is two-fold:

1) because individual averages are no longer calculated off a common base, the sum of sub-category averages will no longer equal the total average.

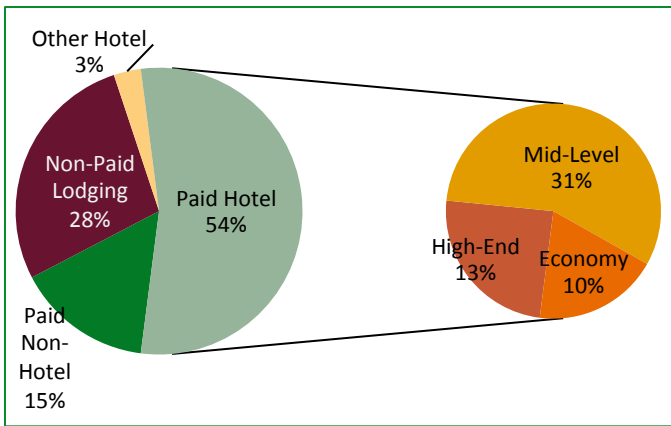
2) it will be difficult to compare 2012 per-person-per-day spending to previous years, particularly for Transportation and Lodging.

Where do Asheville visitors stay?

- About 5 out of 10 visitors stay in Paid Hotels while 3 in 10 stay with friends/relatives.
- Among those who stay in paid accommodations, 1 out of 3 stay in mid-level, and another 1 out of 10 stay in both high-end and economy hotel/motel accommodations.
- Asheville hosts a slightly larger share of visitors staying in Paid Hotels, especially in Mid-Level Hotels, than the average US destination.
- Asheville's Paid Lodging received an average hotel satisfaction rating of 8.2 (on a scale of 1=poor to 1=Excellent)...similar to the US average hotels.
- Almost all travelers who made reservations before staying in paid accommodations; particularly using Chain websites was a frequent channel (4 out of 10).

Asheville Accommodations

OVERNIGHT STAYS 2012-2014 (%)



How long do Asheville's visitors stay?

- The average Overnight Leisure traveler visits for less than three nights.
- An average stay in Asheville lasts 2.44 nights away from home, compared to 2.38 nights in 2011-13.
- Overnight Leisure travelers tend to stay longer at the average US destination (2.7 nights).
- When including day travelers, Asheville's visitors stay much shorter (1.18 days)...slightly decreasing since 2009-11 (1.25 days).

When do travelers visit Asheville?

- Asheville hosts guests steadily throughout the year with a clear preference for the Summer months during 2012-14.
- Asheville's visitation has been fairly consistent over the years.

DKSA follows STR lodging segments

"Chain Scale Segments are a method by which branded hotels are grouped based on the actual average room rates: Luxury (\$290 for 2013F as of Q2), Upper Upscale (\$161), Upscale (\$122), Upper Midscale (\$101), Midscale (\$77), and Economy (\$54) Chains" (STR)

Slight decrease of 0.1 in average hotel satisfaction due to increase in poor ratings (satisfaction)

In DKSA's Performance/Monitor SM survey, respondents are asked about their participation in 6 different net activities including 44 activities

- 9 out of 10 travel parties participate in an activity when visiting Asheville.
- The same participation rate as in other US average destinations.
- The most popular activities for Asheville in 2012-14 were:
 - Historic Sites
 - Shopping
 - Touring/Sightseeing
 - Hiking
 - Parks (national/state)
 - Nightlife
 - Culinary/Dining Experience
 - Visit Friends/Relatives
 - Winery/Distillery/Brewery Tours
 - Museum, Art Exhibits, etc.
- Other activities that travelers less frequently took part in or visited included:
 - Golfing
 - Spa
 - Service/Volunteerism/Charity
 - Medical/Health/Doctor Visit
 - Religious/Faith Based Conference
 - Fishing
 - Extreme/Adventure Sports
- Relative to travelers in average US destinations, Asheville's traveler more often take part in activities related to the average US destination:
 - Winery/Distillery/Brewery Tours
 - Historic Sites
 - Touring/Sightseeing
 - Extreme/Adventure Sports
 - Museums, Art Exhibits, etc.
 - Hiking
 - Parks (national, state)
 - Eco/Sustainable Travel
 - Festival/Fairs
 - Culinary/Dining Experience

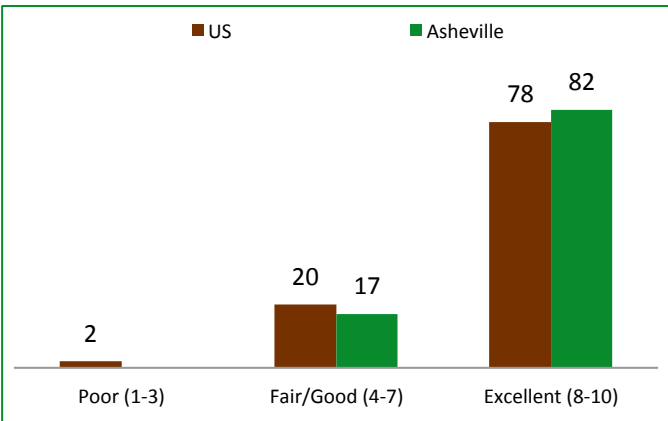
How do Asheville visitors rate the City?

Respondents are asked to rate their overall satisfaction with the destinations they visit and on the overall value-for-the-money the destination provides. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is high or 'excellent'.

Overnight Leisure visitors report exceptionally strong image attribute ratings for Asheville in 2012-2014; with Likely to Recommend Asheville (average of 9.1) leading the way, followed by friendly/helpful people in Asheville (average of 8.9), value-for-the-money (average of 8.9), feeling of safety (average of 8.9), and satisfaction with Asheville (average of 8.8).

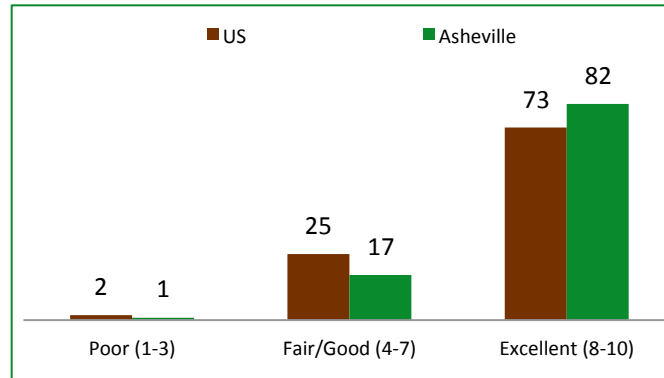
Overall Destination Satisfaction

OVERNIGHT LEISURE PERSON-STAYS 2012-2014 (%)



Destination Value for the Money

OVERNIGHT LEISURE PERSON-STAYS 2012-2014 (%)

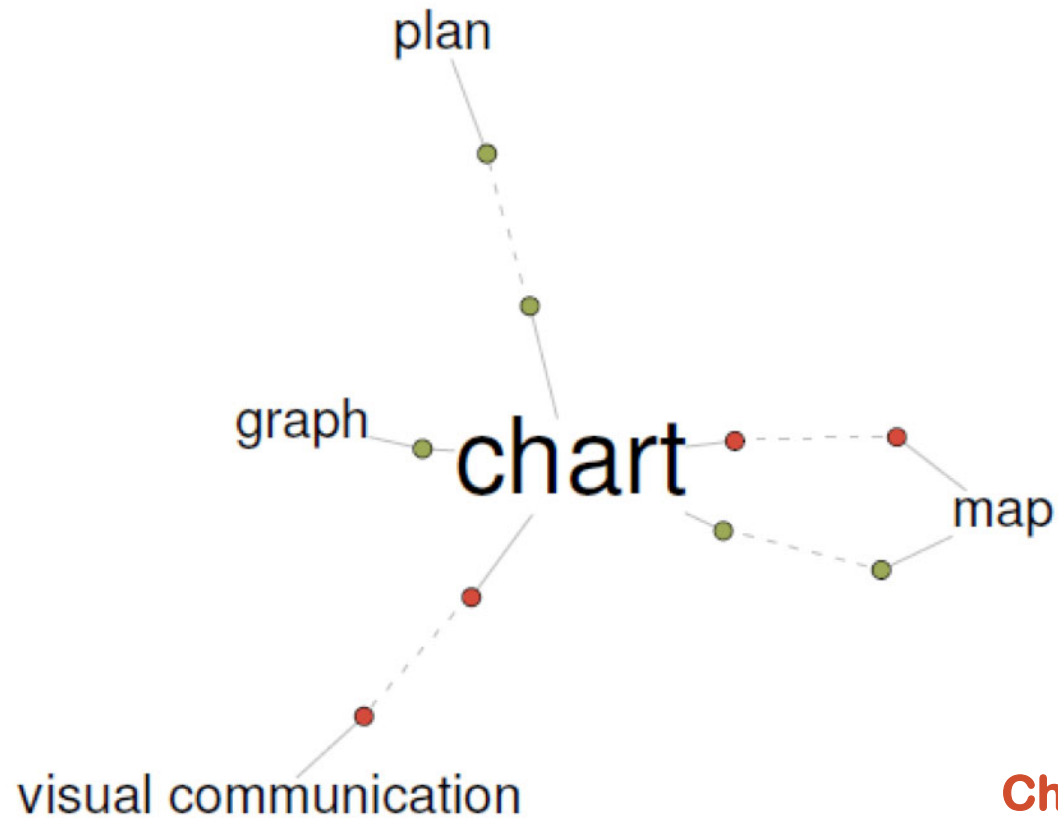


Consistently over the past five time periods, Asheville rated higher than the average US destination on all attributes due to higher excellent (8-10) and no poor (1-4) ratings for satisfaction and value for Asheville.

Asheville received from travelers a range of excellent ratings (from 82% for Satisfaction and Value-for-the-money up to 86% for Likely-to-Recommend).

Asheville's hotel sector, however, received slightly lower averages among those staying in Paid Hotel/Motels for satisfaction with the hotel (8.2) and value-for-the-money (8.0) than the destination as a whole...just like the average US destination.

Asheville's average satisfaction and value ratings consistently increased over the past four consecutive time periods.



Charts and Graphs

Asheville Year-End 2012-2014 Visitor Profile

Asheville Share of U.S. Travel Segments

MARKET SHARE

■ Stays

■ Person-Stays

■ Person-Days

■ Direct Spending

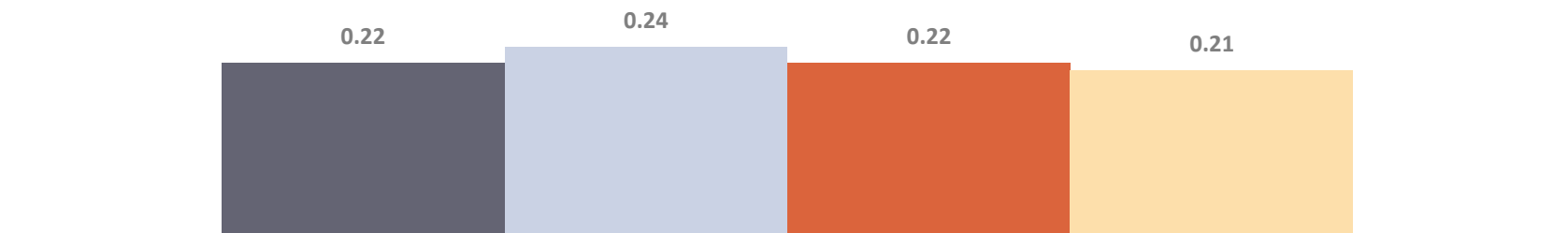


Chart 1 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Age Distribution: U.S. and Asheville

DEMOGRAPHICS

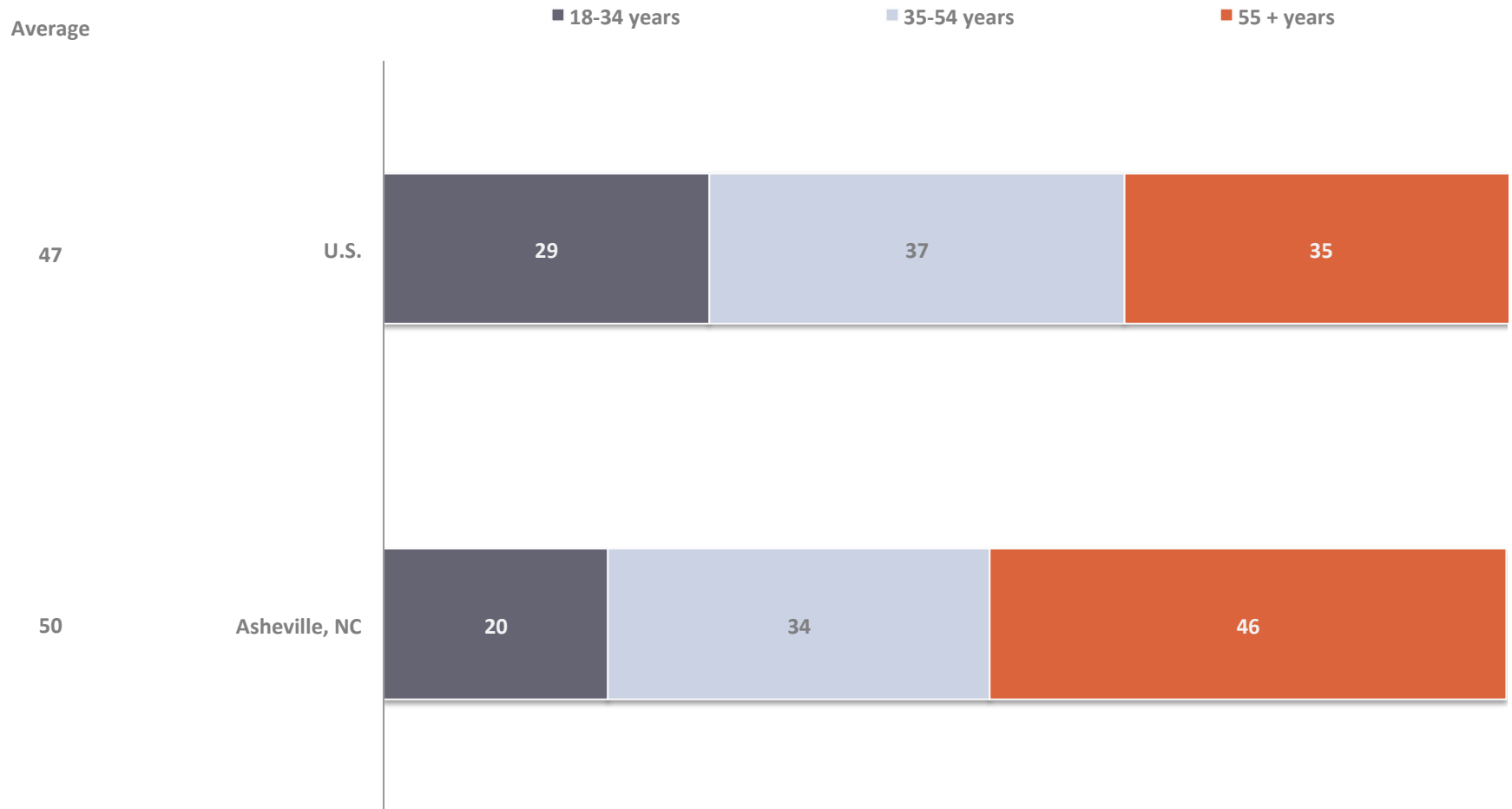


Chart 2 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Age

DEMOGRAPHICS

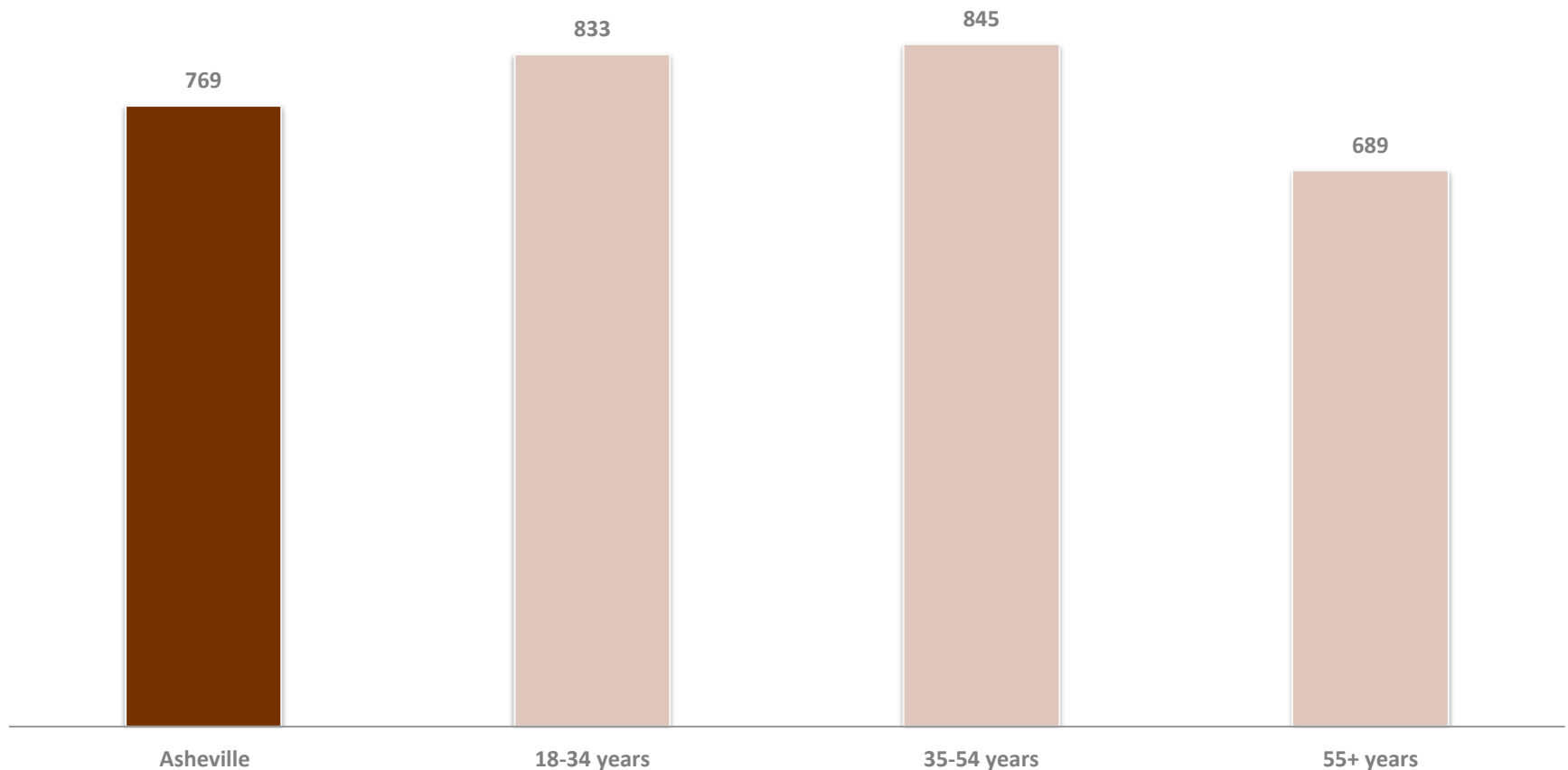


Chart 3 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

GLOSSARY

Average Party per Trip Spending

Includes reported expenditures of all travelers (including transportation expenditure) who spend more than \$1 on their trip to or within the destination. Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per trip spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.

Asheville Age Comparison

DEMOGRAPHICS

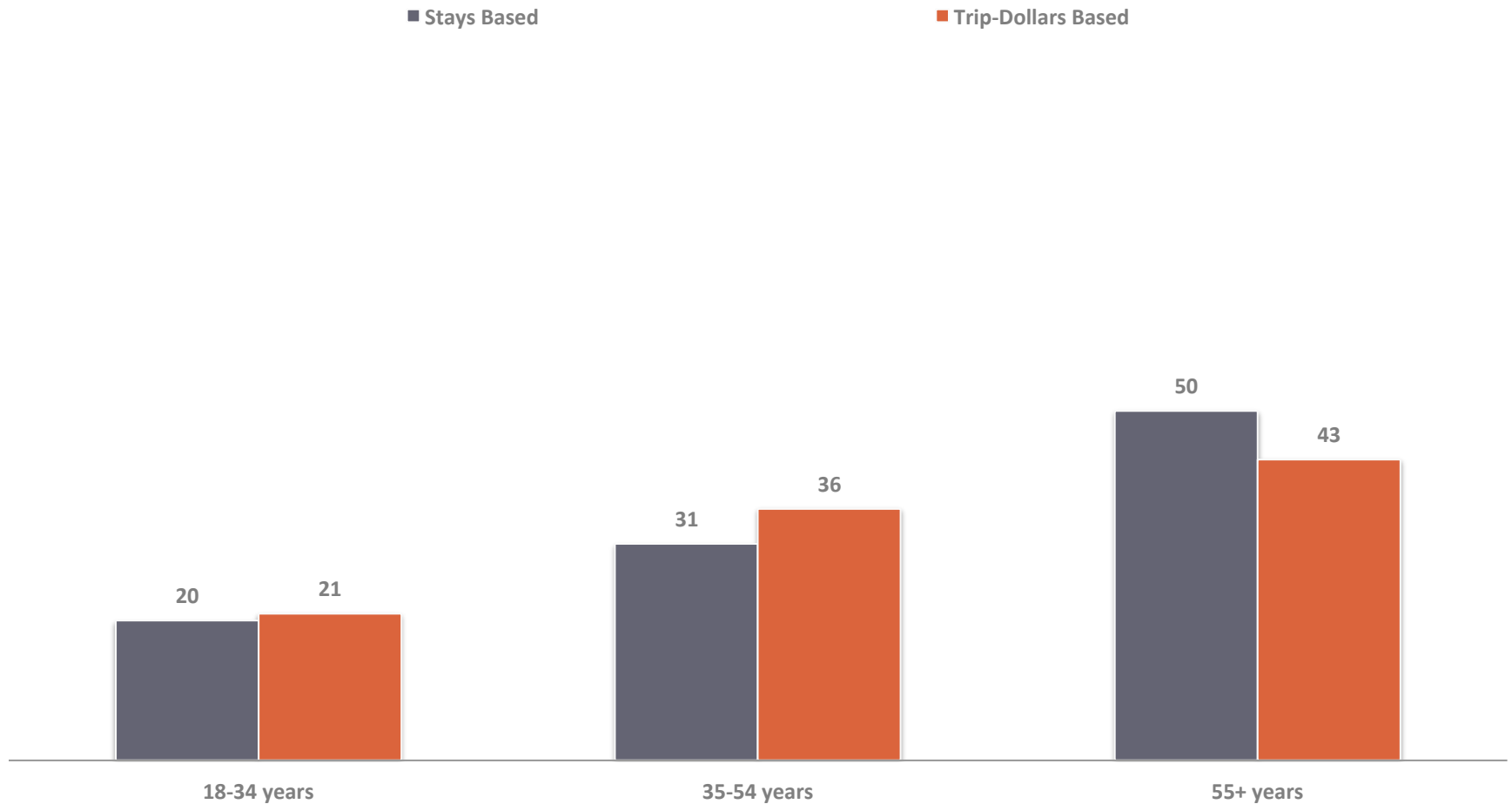


Chart 4 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Racial Distribution: U.S. and Asheville

DEMOGRAPHICS

■ White ■ Black ■ Asian ■ Native Hawaiian or other Pacific Islander ■ Native American or Alaska Native ■ Other/Mixed



Chart 5 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 534 household count

Hispanic Origin: U.S. and Asheville

DEMOGRAPHICS

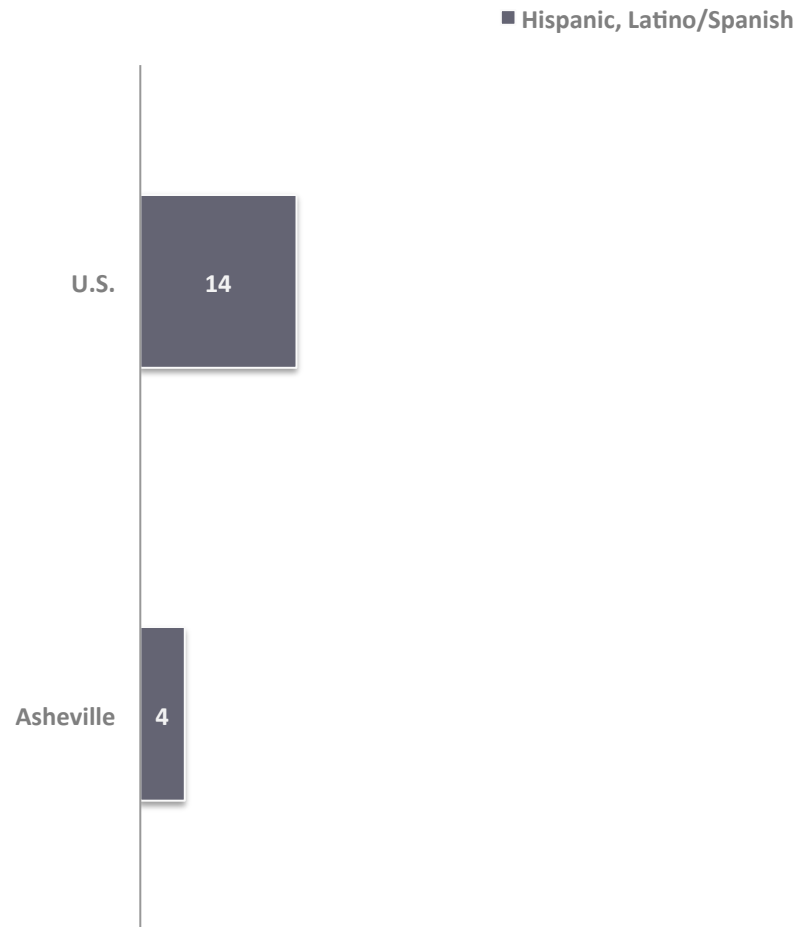


Chart 6 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 8 household count (*use with caution due to low sample size)

Sexual Orientation: U.S. and Asheville

DEMOGRAPHICS

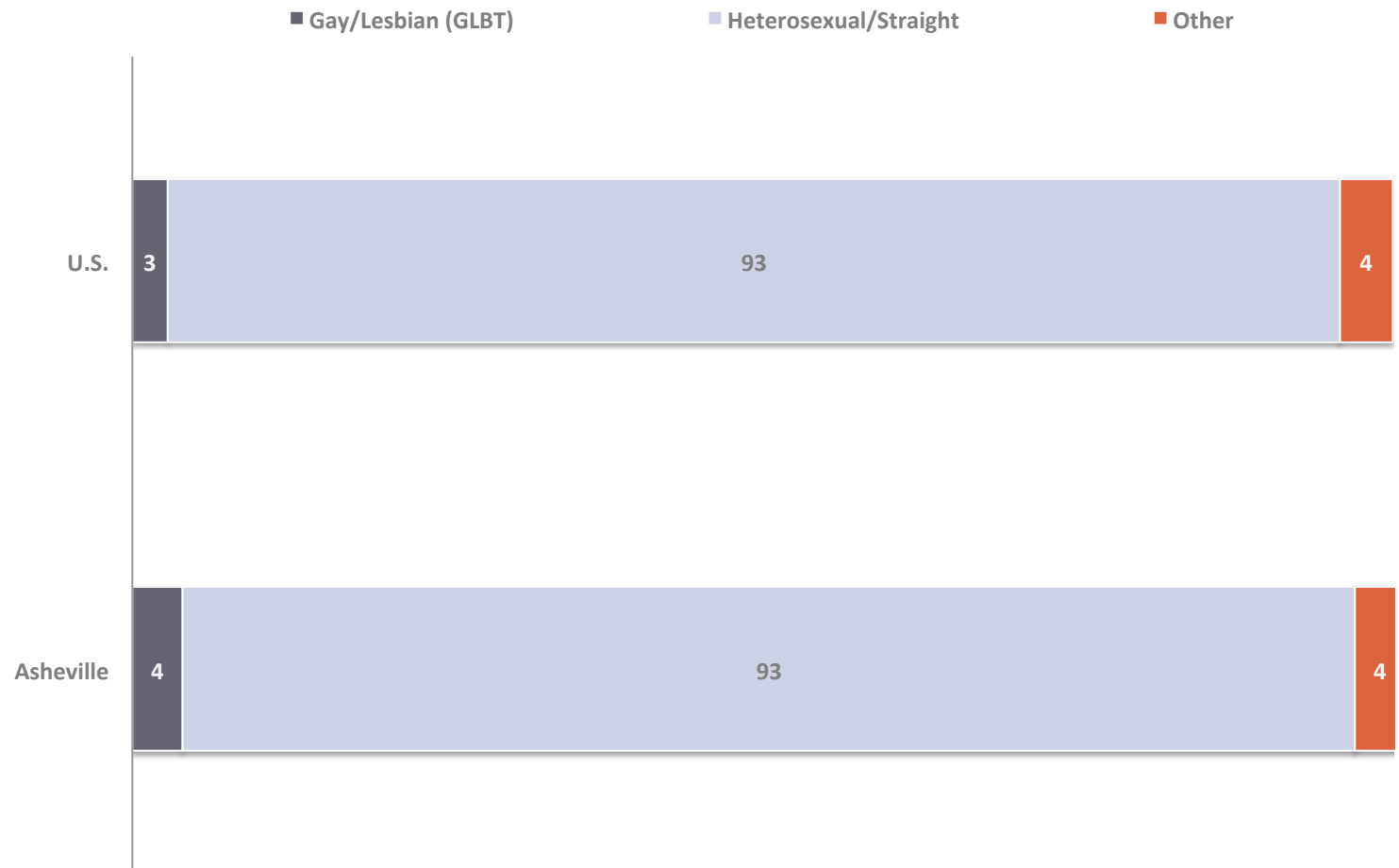


Chart 7 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 539 household count

Distribution of Children in Household: U.S. and Asheville

DEMOGRAPHICS

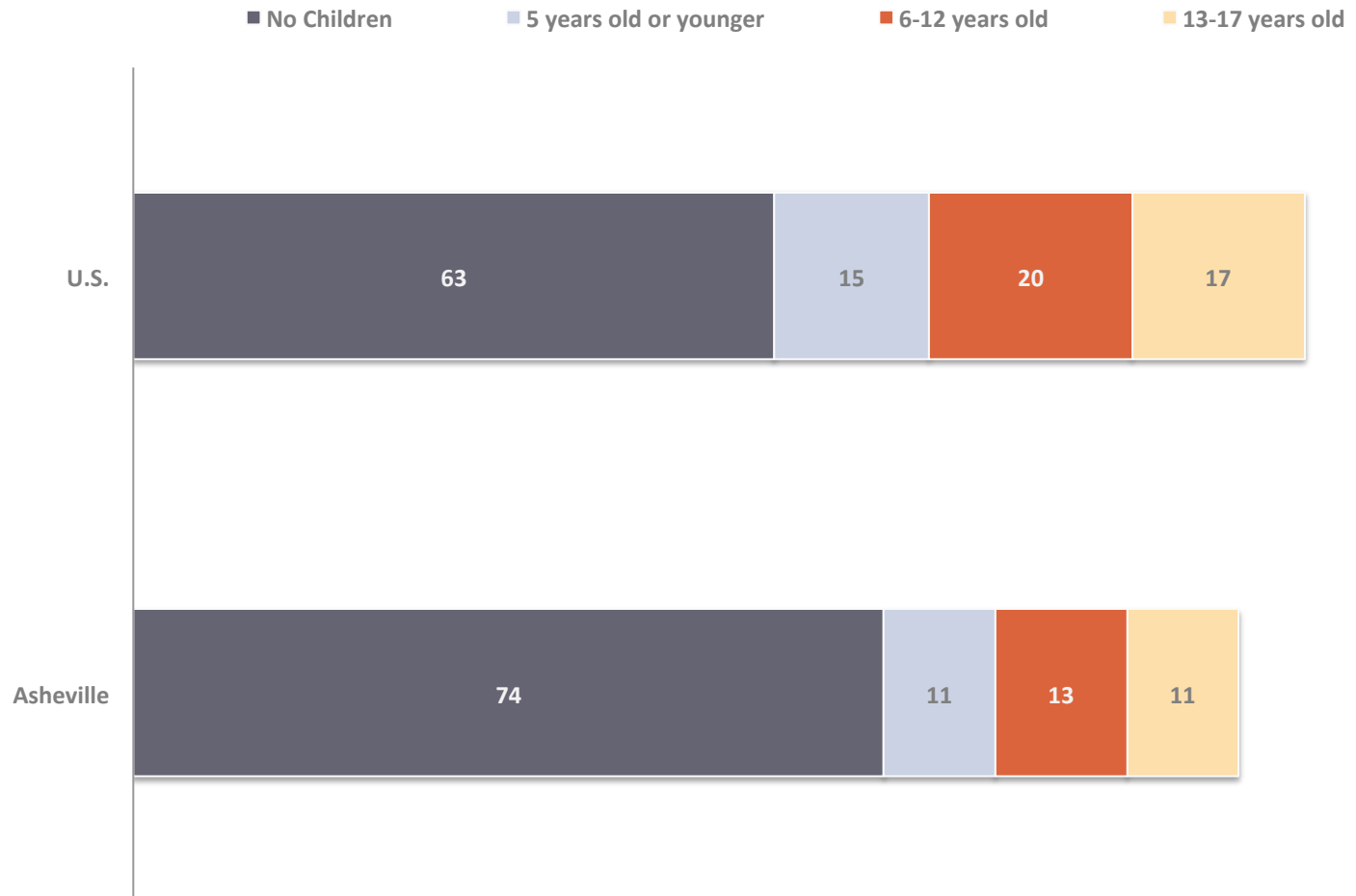


Chart 8 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

GLOSSARY

Sum exceeds 100% due to multiple-children households.

Household Income Distribution: U.S. and Asheville

DEMOGRAPHICS



Chart 9 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Lifestage Distribution: U.S. and Asheville

DEMOGRAPHICS

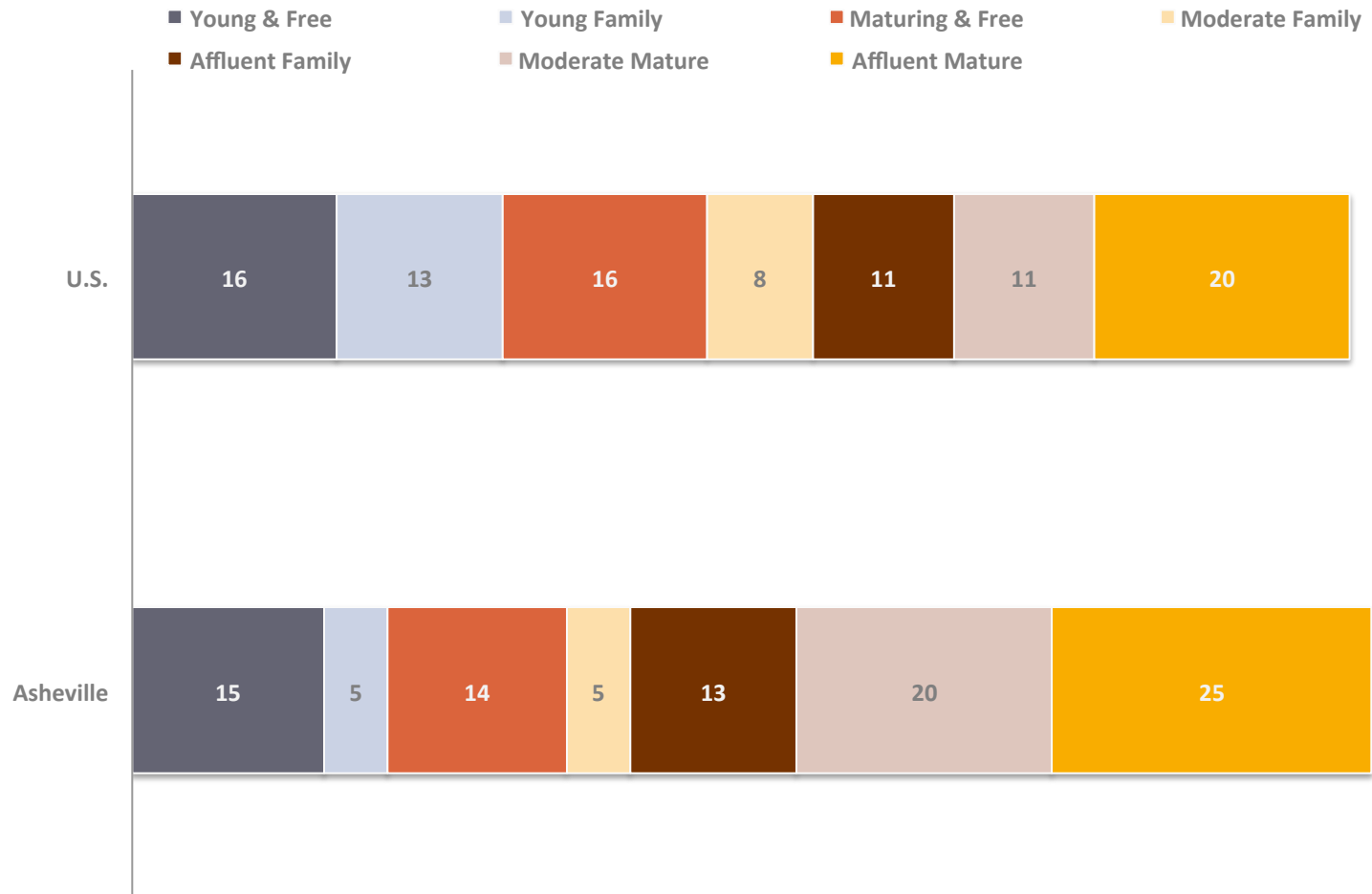


Chart 10 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

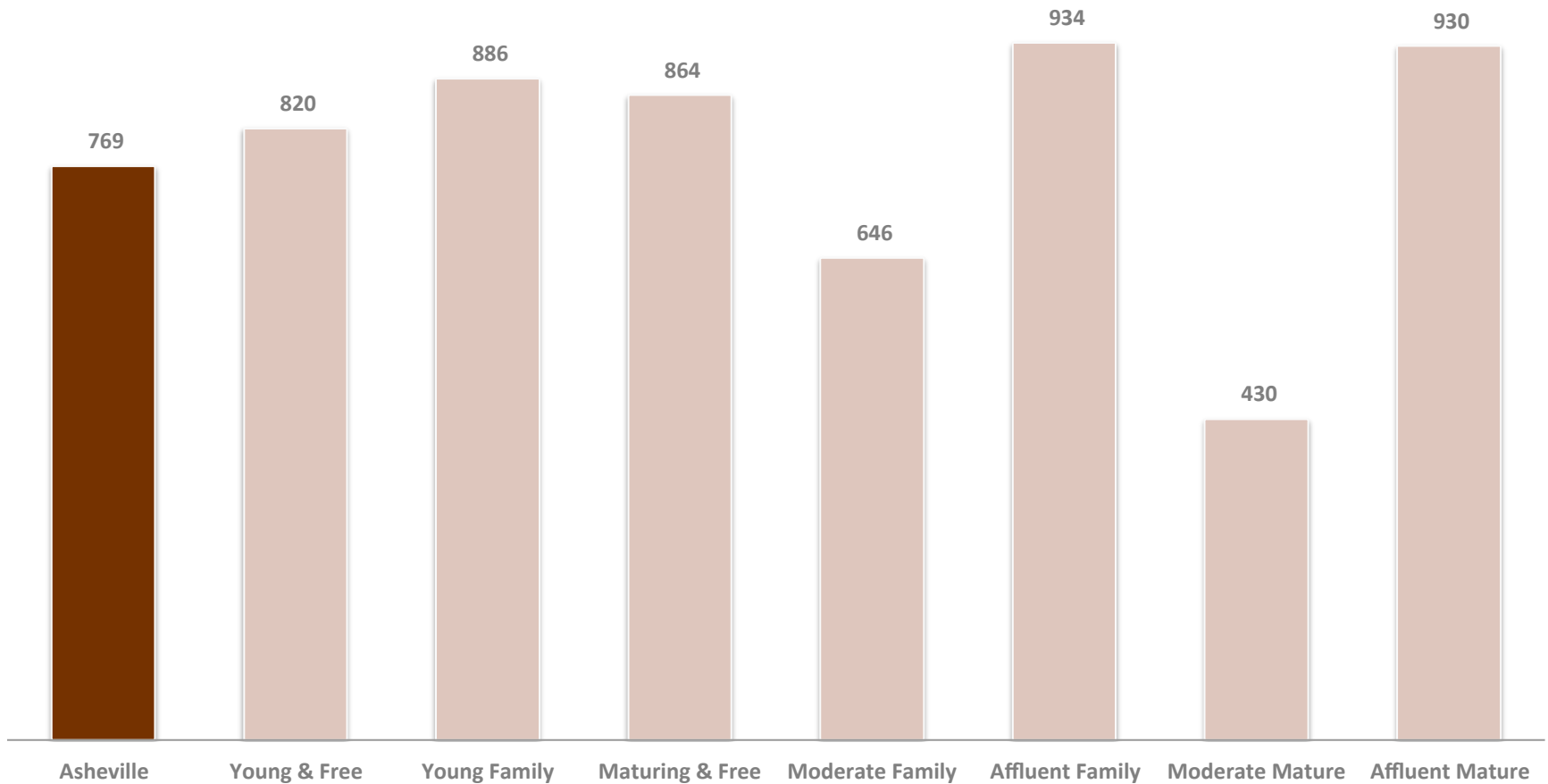


Chart 11 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Lifestage Comparison

DEMOGRAPHICS

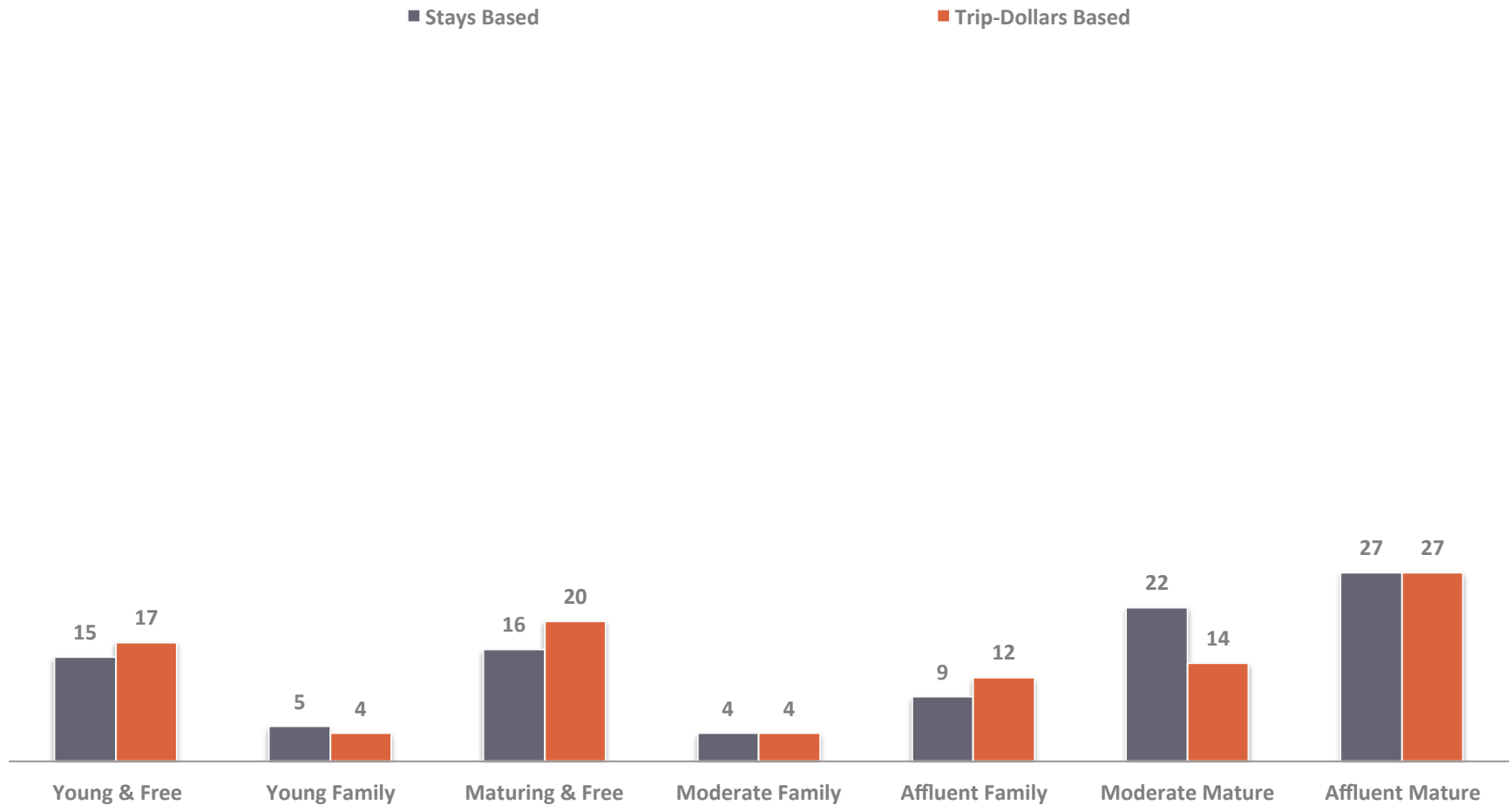


Chart 12 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 570 household count

Traveler Generation Distribution: U.S. and Asheville

DEMOGRAPHICS

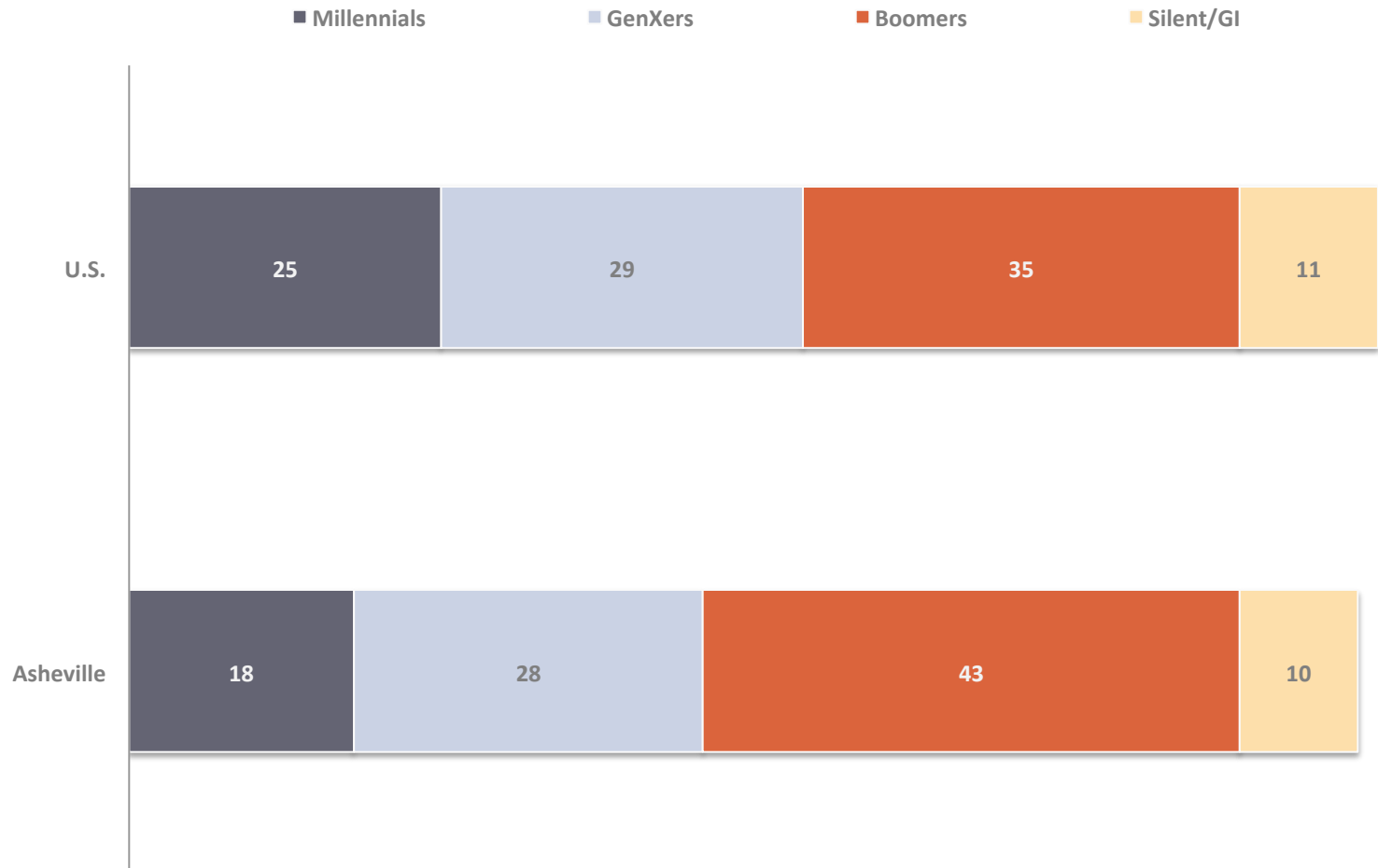


Chart 13 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

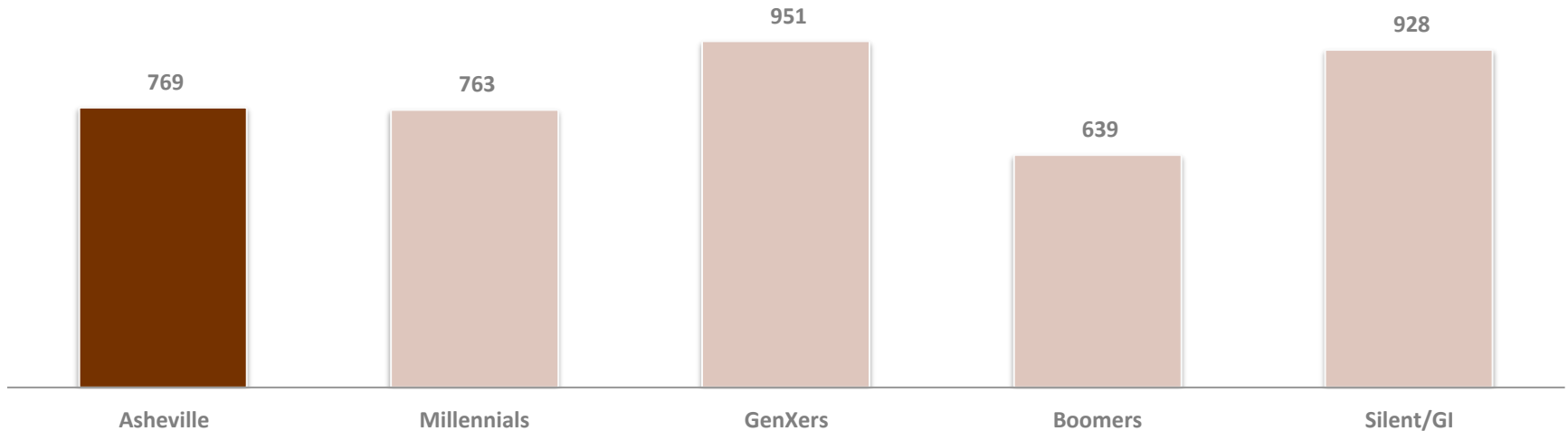


Chart 14 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Grren Bay N = 570 household count

Asheville Traveler Generation Comparison

DEMOGRAPHICS

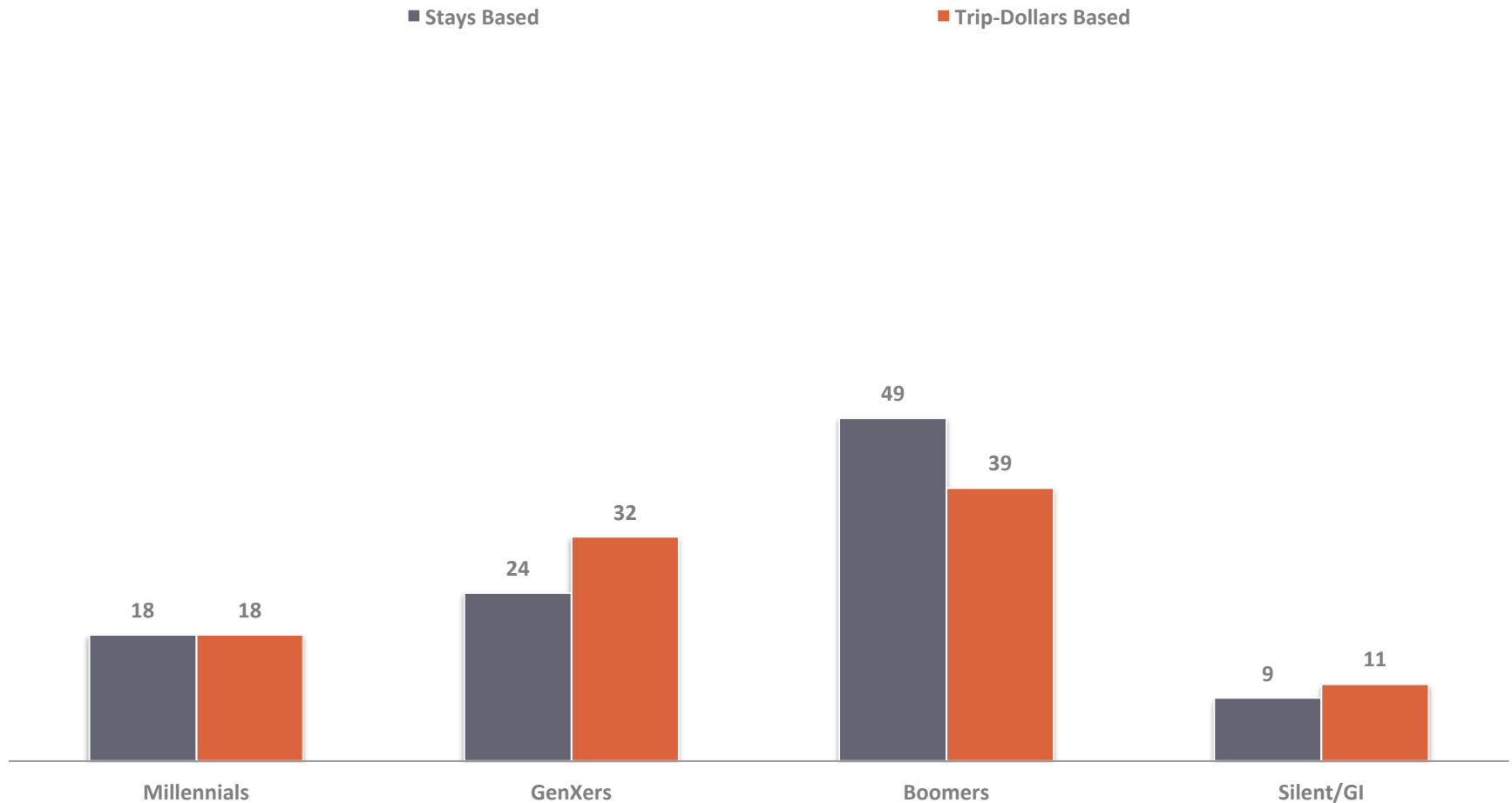
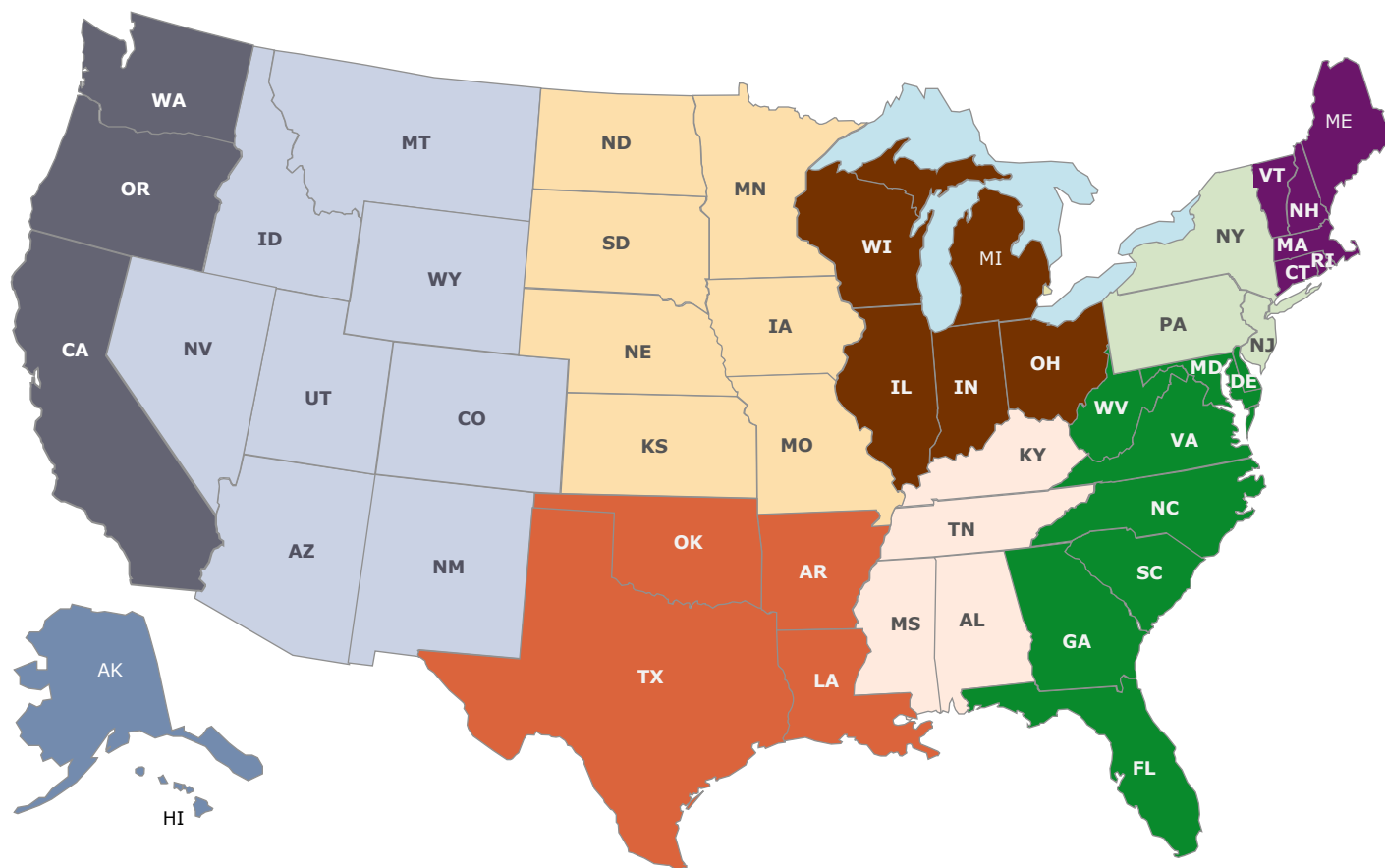


Chart 15 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 570 household count

Origin Divisions for Travel to Asheville

TRIP ORIGIN



LEGEND

Pacific	1.7%
Mountain	0.4%
West North Central	1.4%
West South Central	1.6%
East North Central	7.7%
East South Central	12.6%
New England	1.5%
Middle Atlantic	5.2%
South Atlantic	67.8%

Chart 16 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 585 household count

Top Origin States to Asheville

TRIP ORIGIN

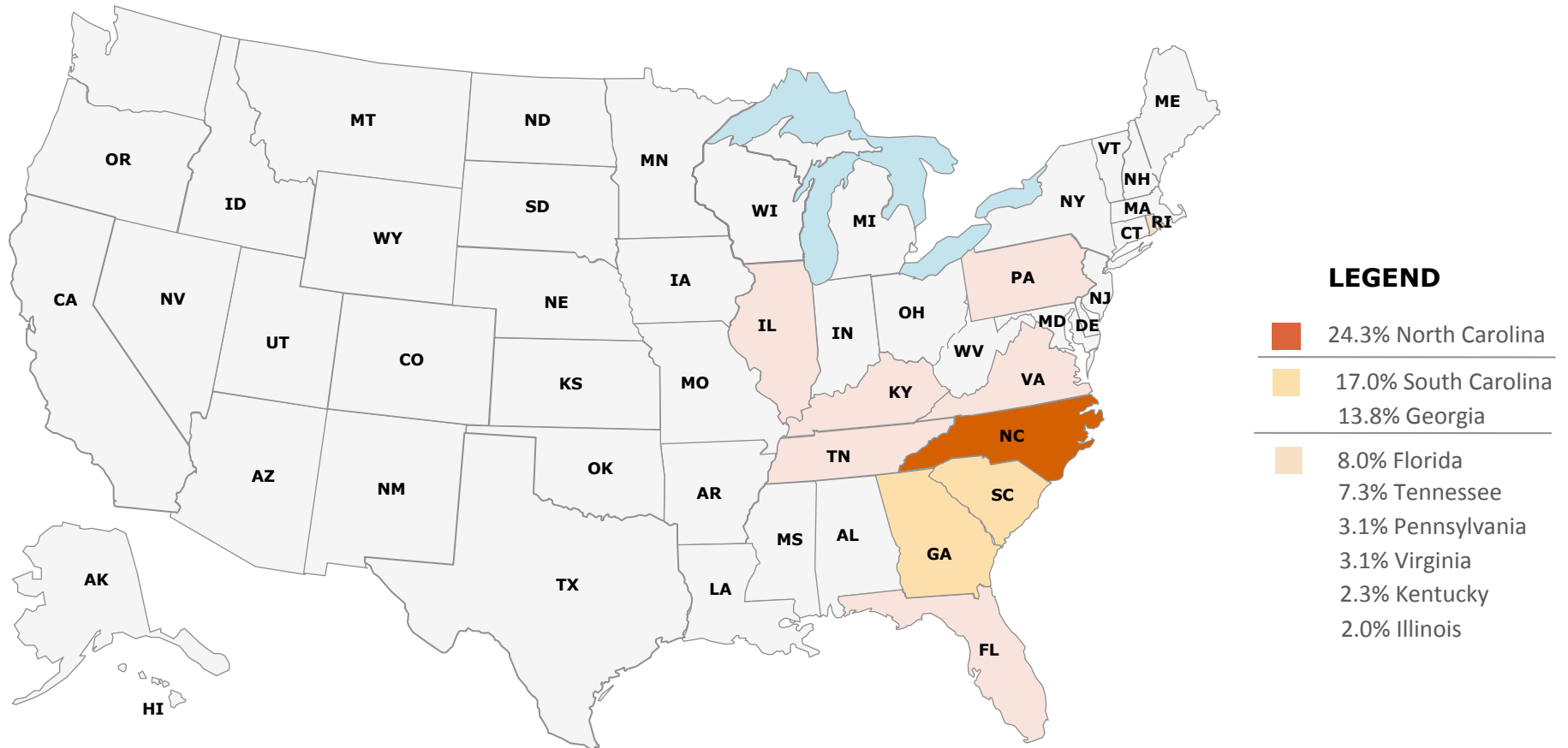


Chart 17 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 585 household count

Top Origin DMAs to Asheville

TRIP ORIGIN

	U.S.	Asheville
Charlotte, NC	1.2%	12.6%
Greenville-Spartanburg, SC – Asheville, NC – Anderson, SC	0.8%	8.8%
Atlanta, GA	2.2%	8.2%
Raleigh-Durham, NC	1.4%	7.3%
Charleston, SC	0.3%	6.8%
Macon, GA	0.2%	5.0%
Greensboro-High Point-Winston Salem, NC	0.7%	2.9%
Philadelphia, PA	2.5%	2.2%
Nashville, TN	0.8%	2.2%
Gainesville, FL	0.1%	2.2%
Top 12 Sum	10.2%	58.2%

Chart 18 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 585 household count

Asheville Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

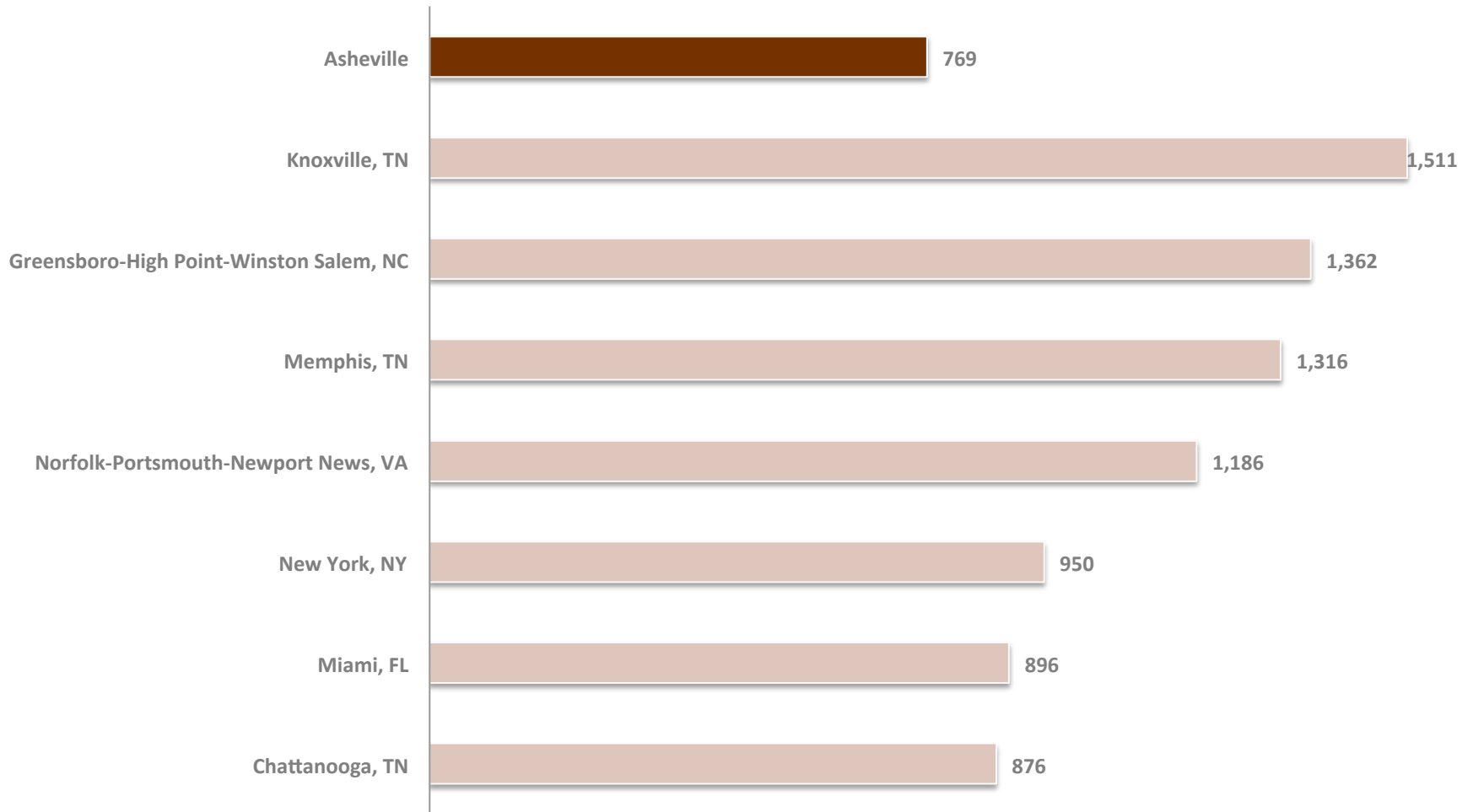


Chart 19 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 568 household count

Asheville Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

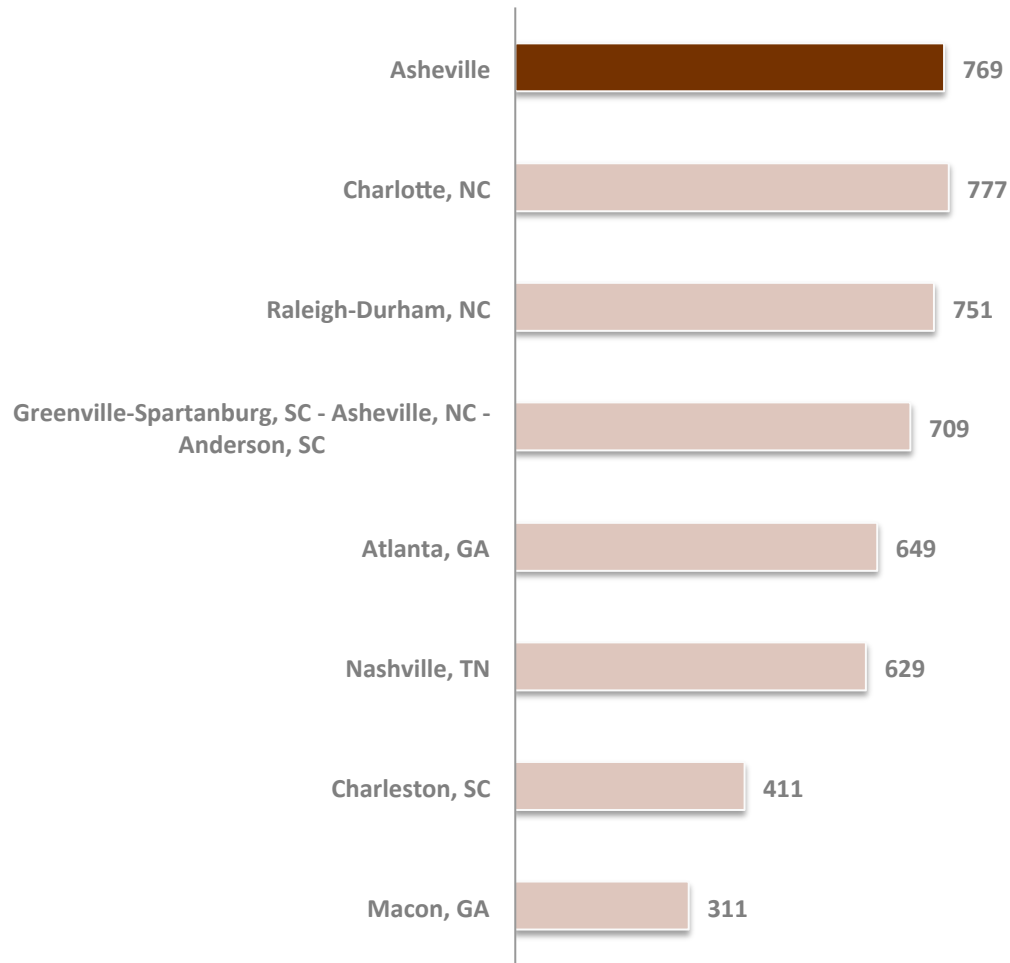


Chart 20 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 568 household count

Asheville Origin DMA Comparison

TRIP ORIGIN

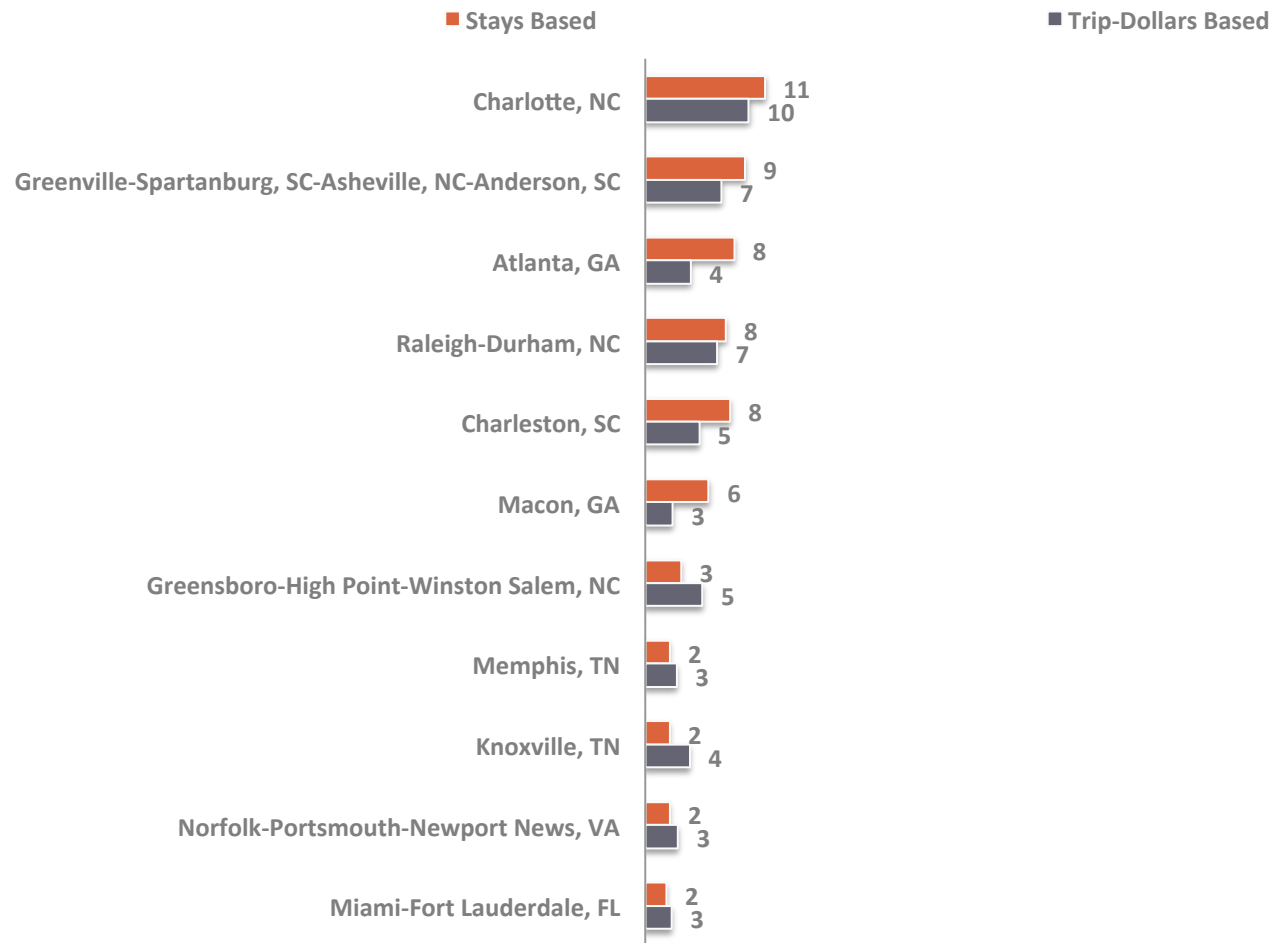


Chart 21 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 585 household count

Main Mode of Transportation: U.S. and Asheville

TRANSPORTATION



Chart 22 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Travel Distance by Auto: U.S. and Asheville

TRANSPORTATION

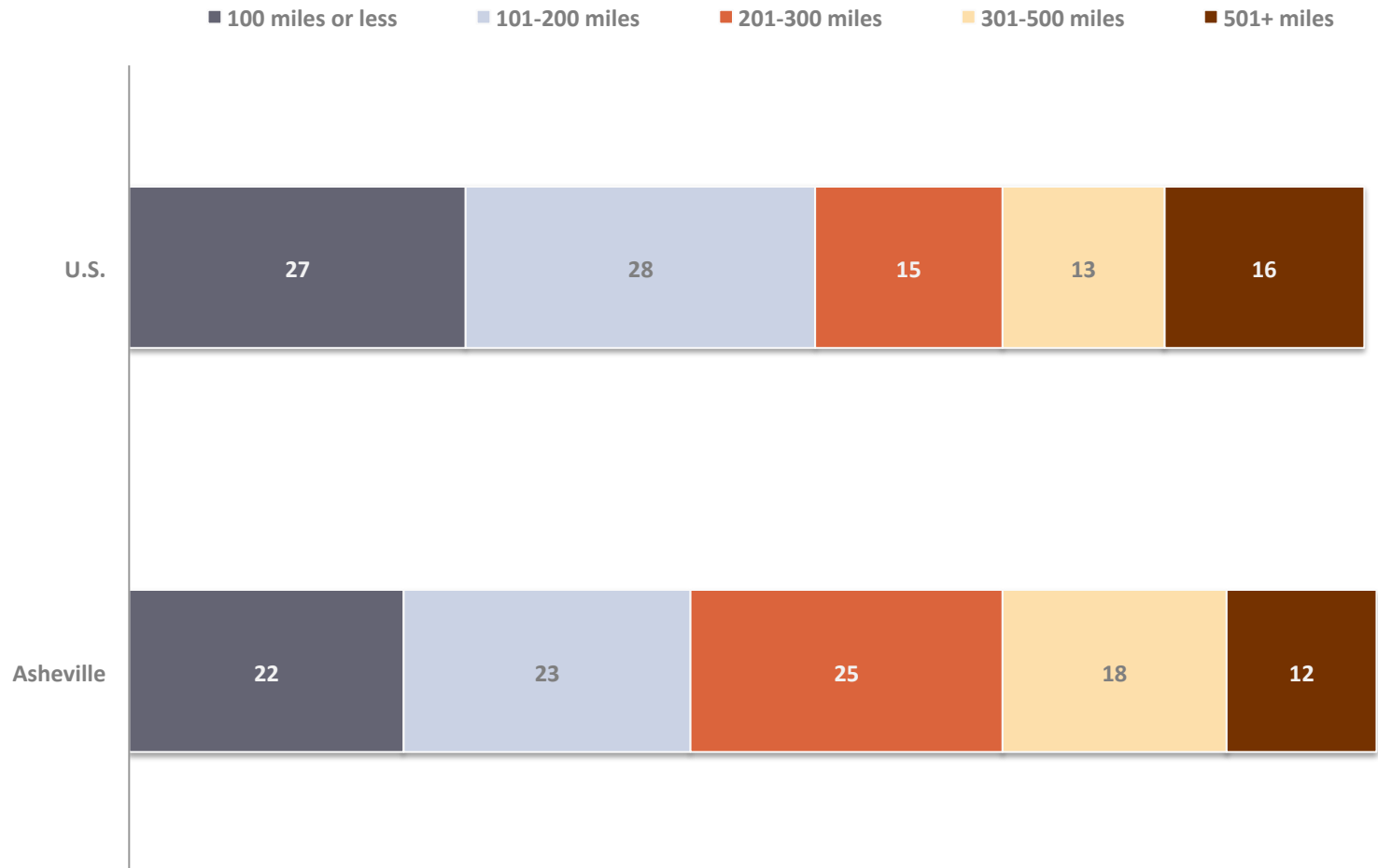


Chart 23 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 519 household count

Travel Distance by Air: U.S. and Asheville

TRANSPORTATION

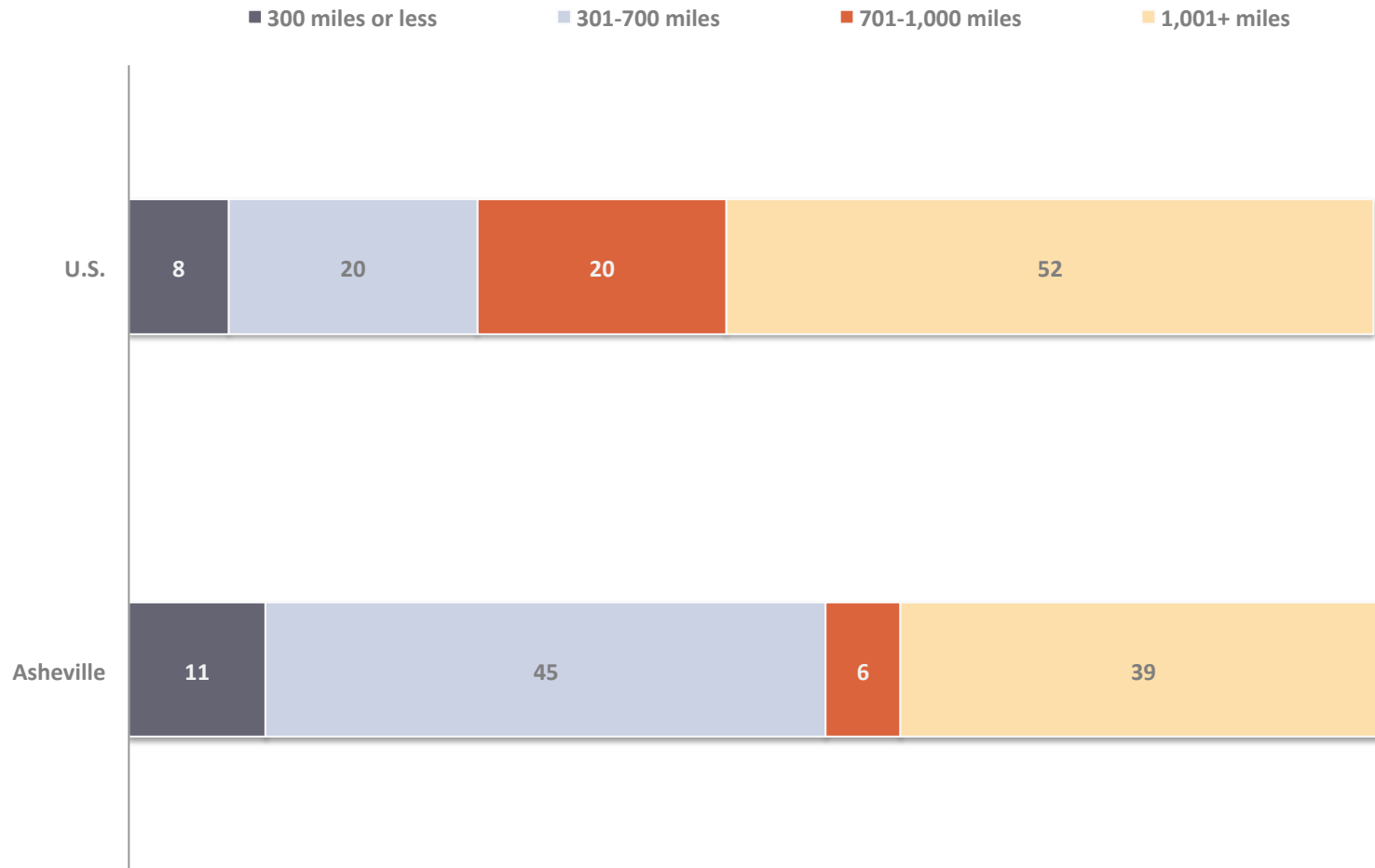


Chart 24 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 61 household count

Asheville Month Trip Started

TRIP TIMING

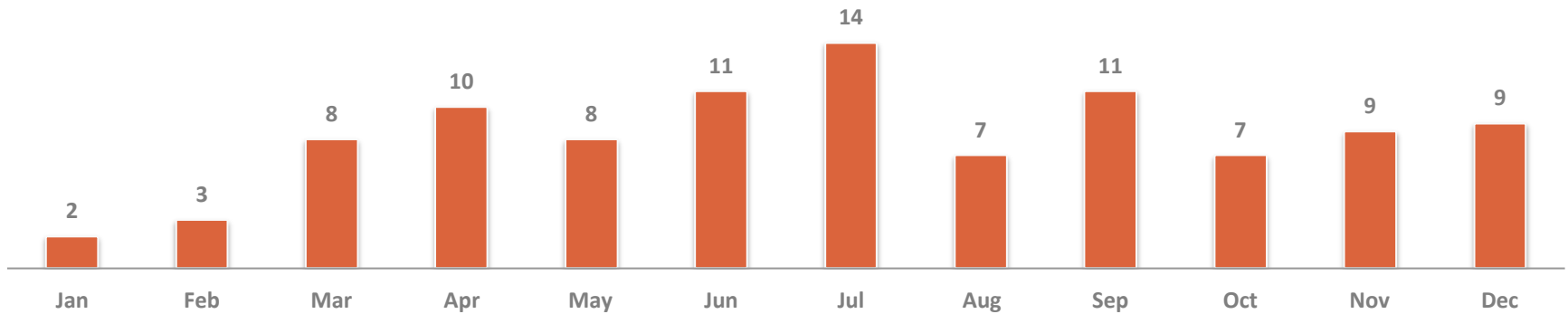


Chart 25 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Trip Timing by Quarter: U.S. and Asheville

TRIP TIMING

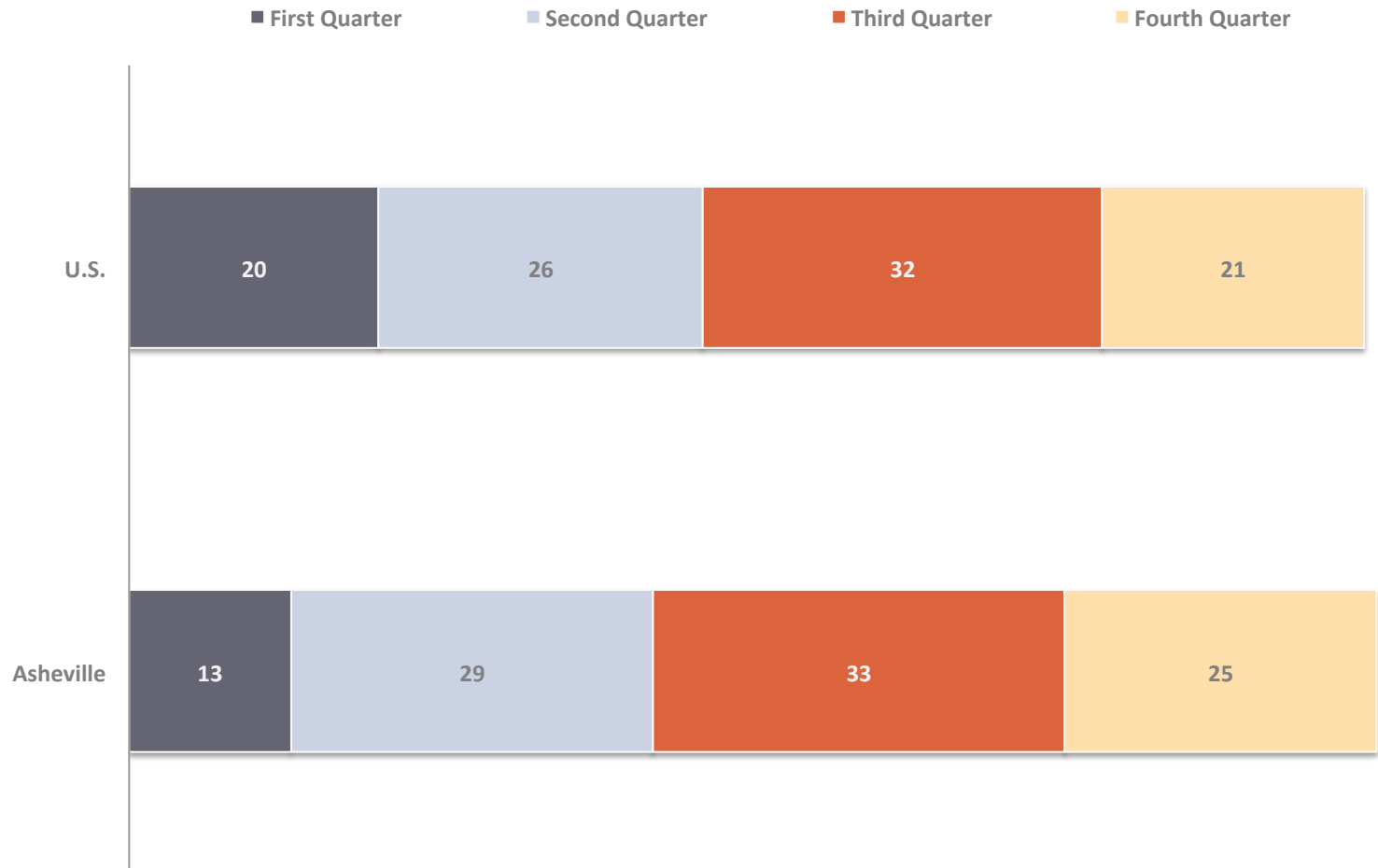


Chart 26 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Quarter

TRIP TIMING

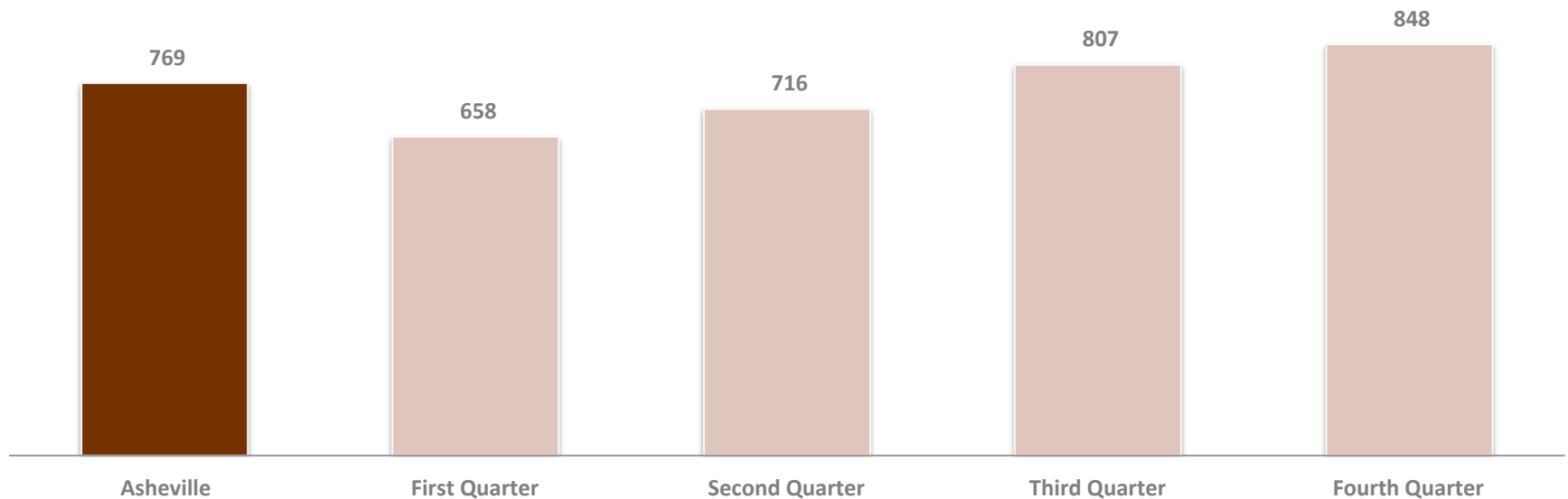


Chart 27 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Trip Timing Comparison by Quarter

TRIP TIMING

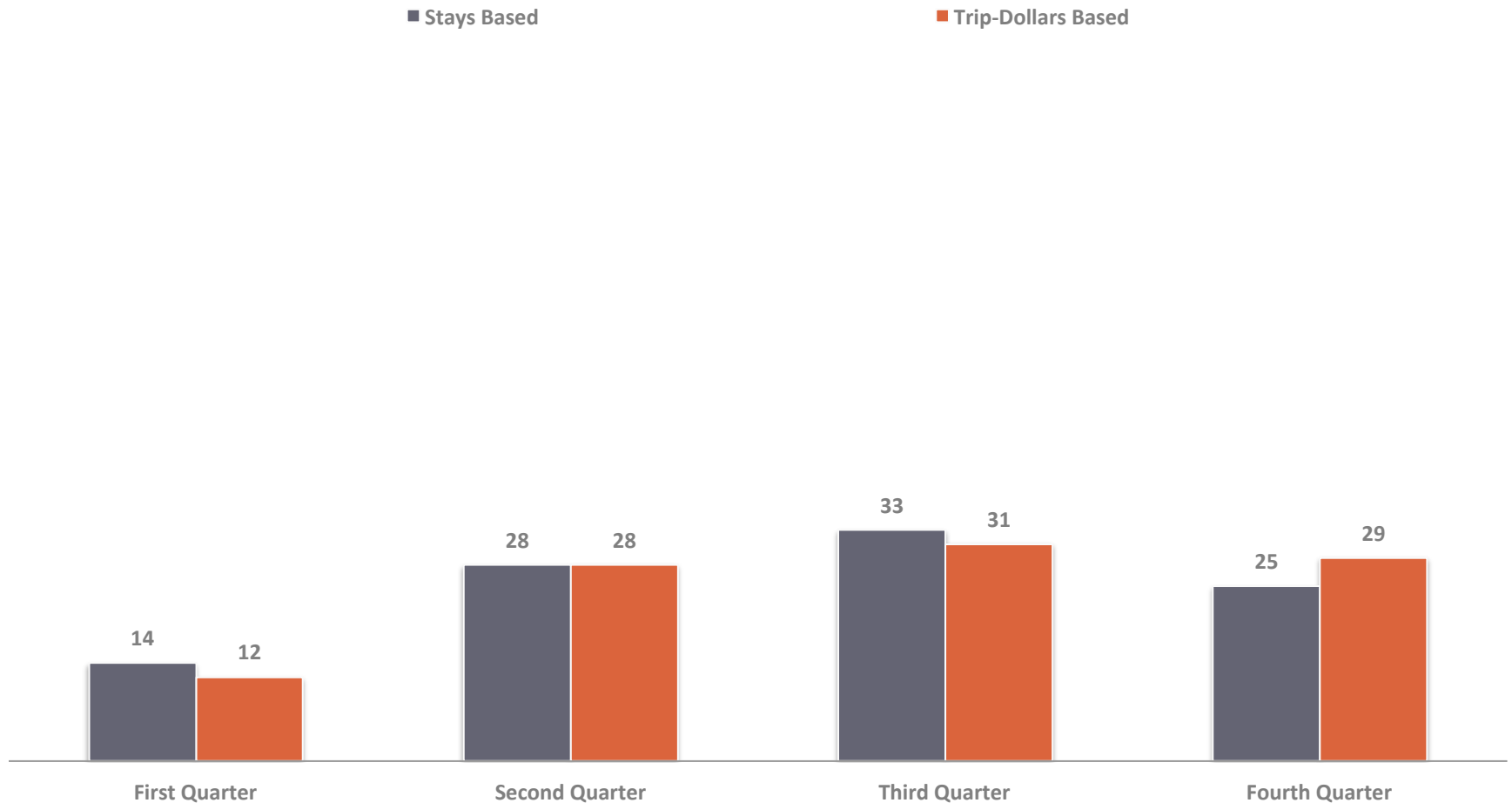


Chart 28 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Trip Timing by Season: U.S. and Asheville

TRIP TIMING

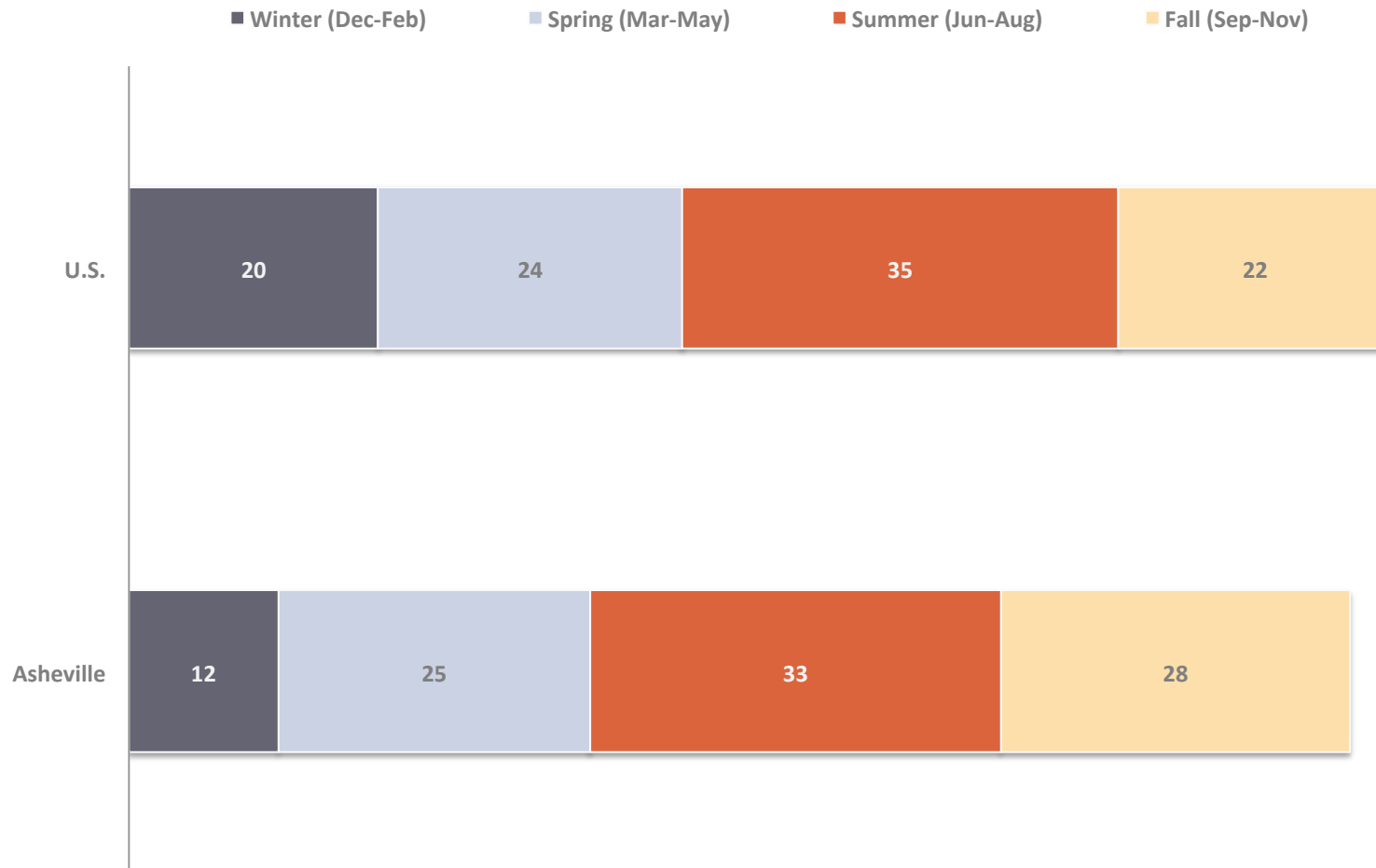


Chart 29 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Season

TRIP TIMING

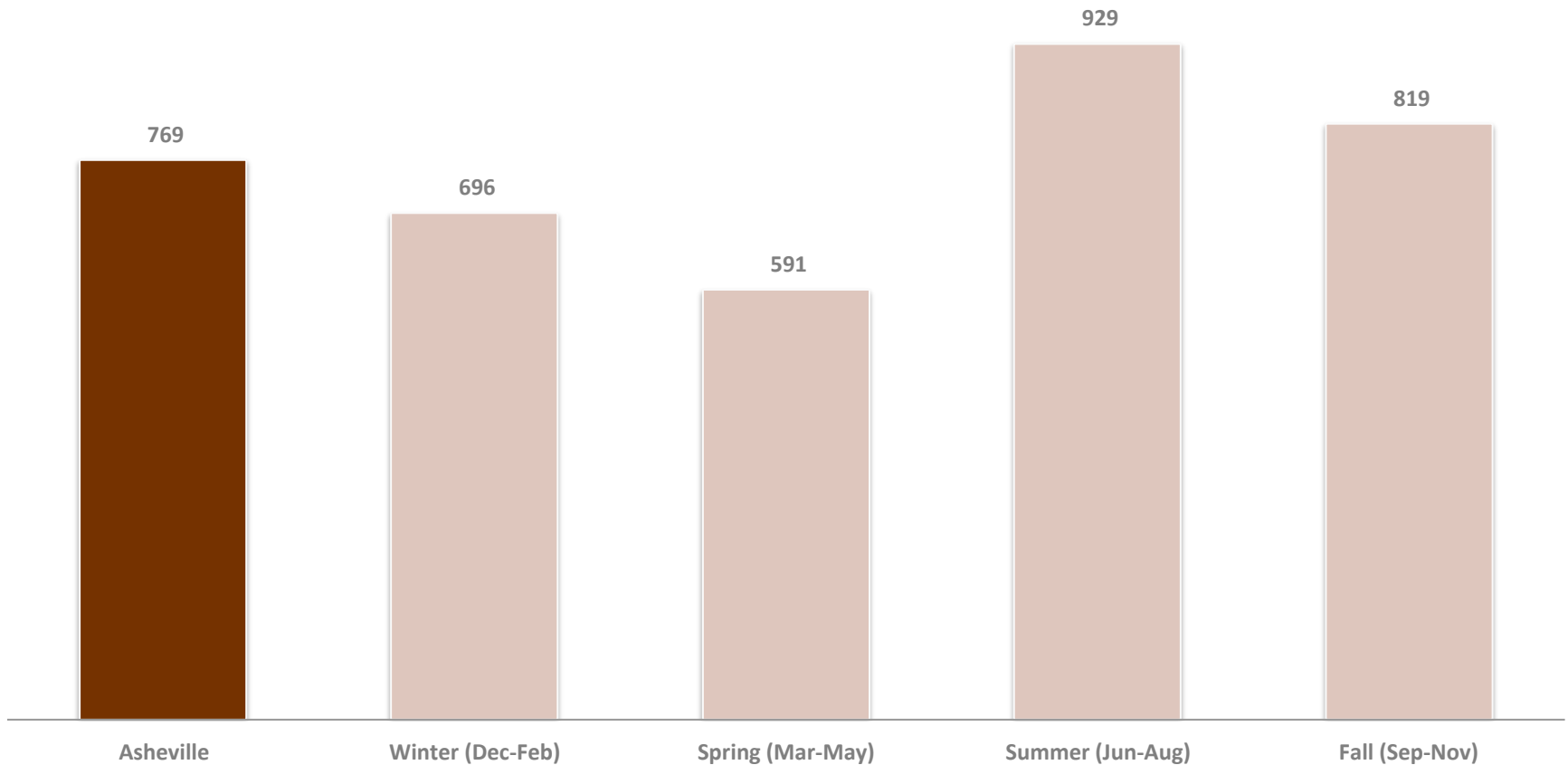


Chart 30 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Trip Timing Comparison by Season

TRIP TIMING

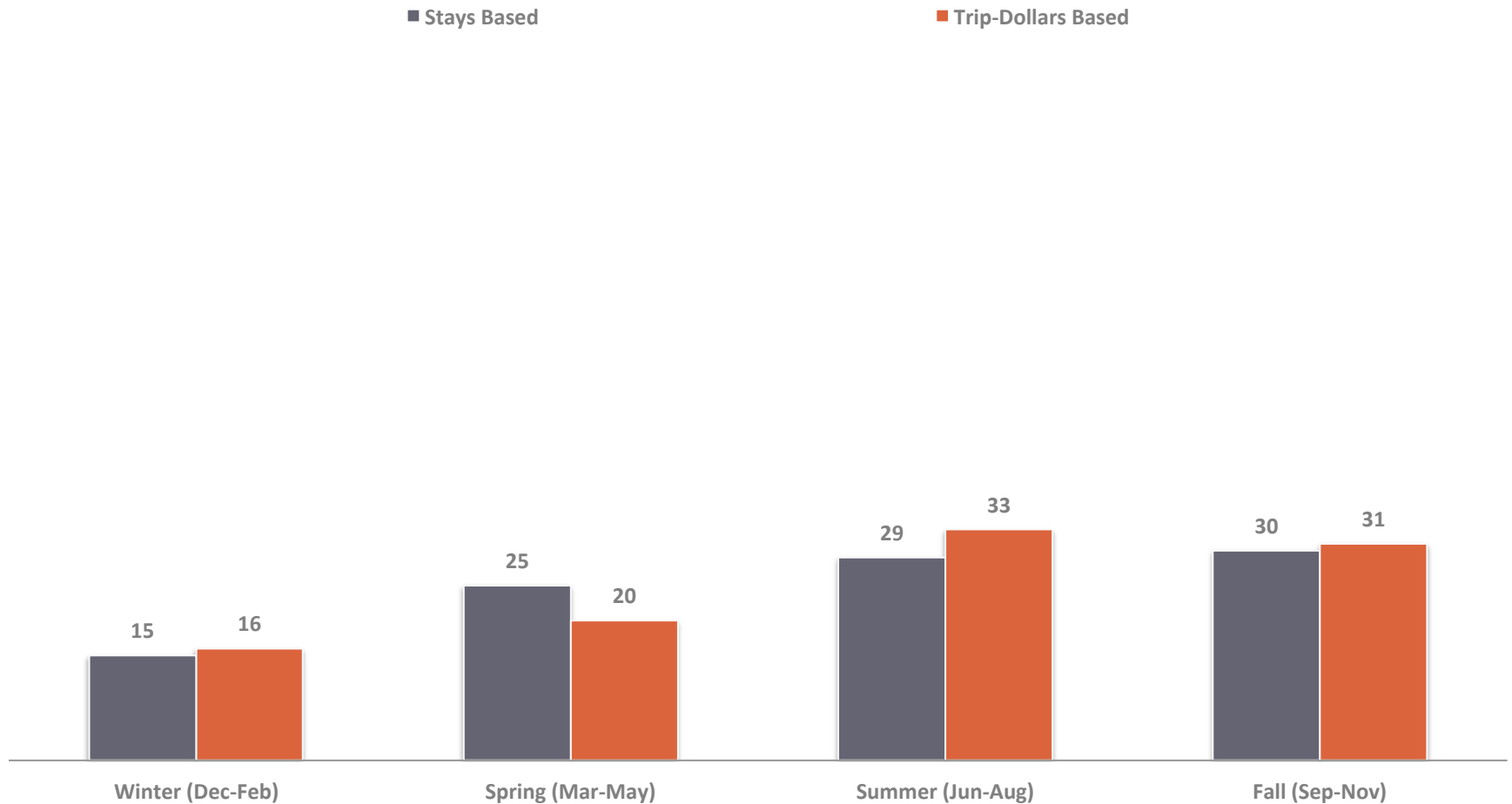


Chart 31 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Purpose of Stay Distribution: U.S. and Asheville

TRIP CHARACTERISTICS

- Getaway Weekend (overnight)
- General Vacation (overnight)
- Visit Friends/ Relatives
- Special Event
- Convention/ Show/ Conference
- Medical/ Health Care
- Seminar/Class/ Training
- Other Leisure/ Personal

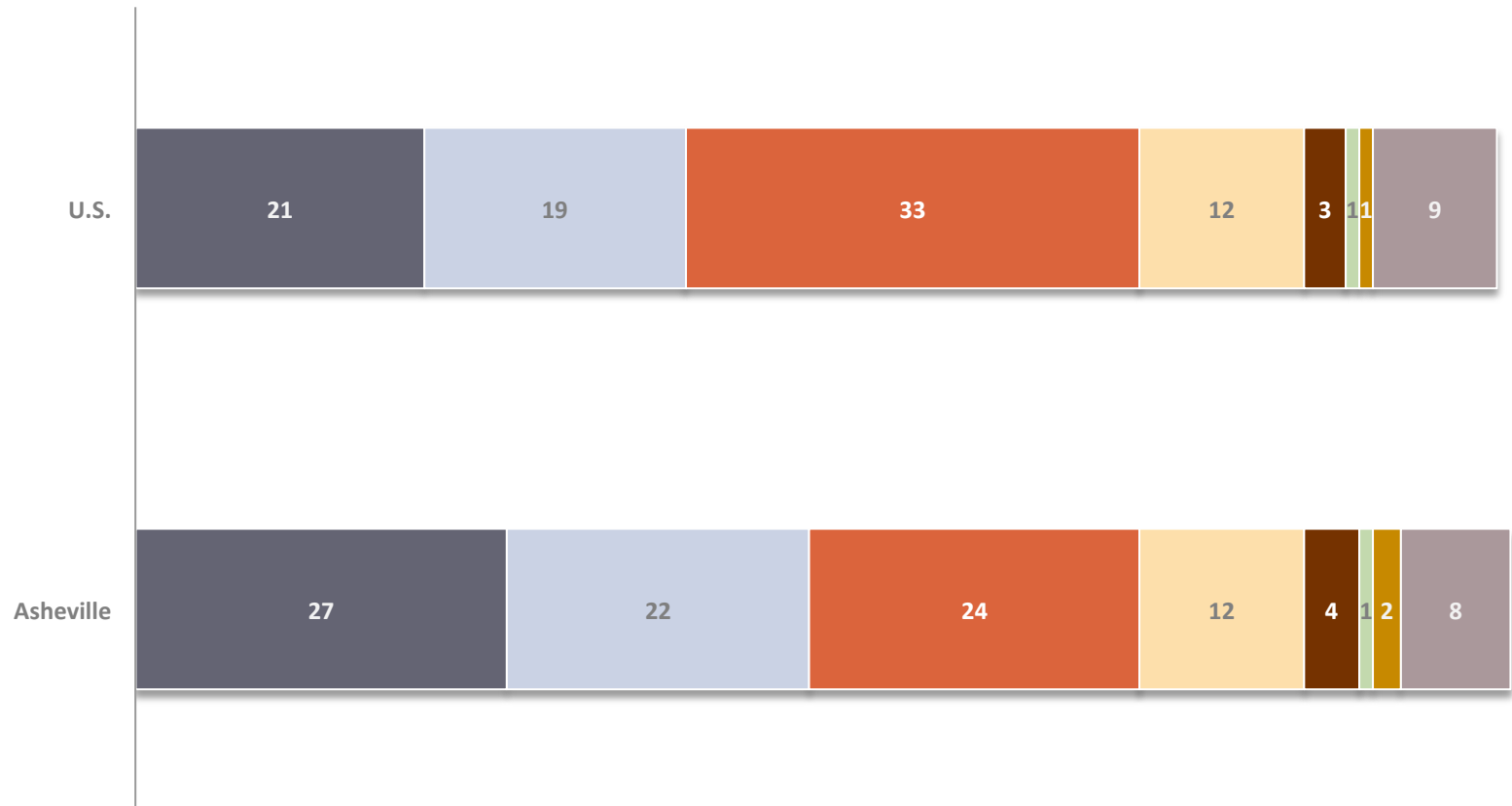


Chart 32 • Segment: 2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Purpose of Stay

TRIP CHARACTERISTICS

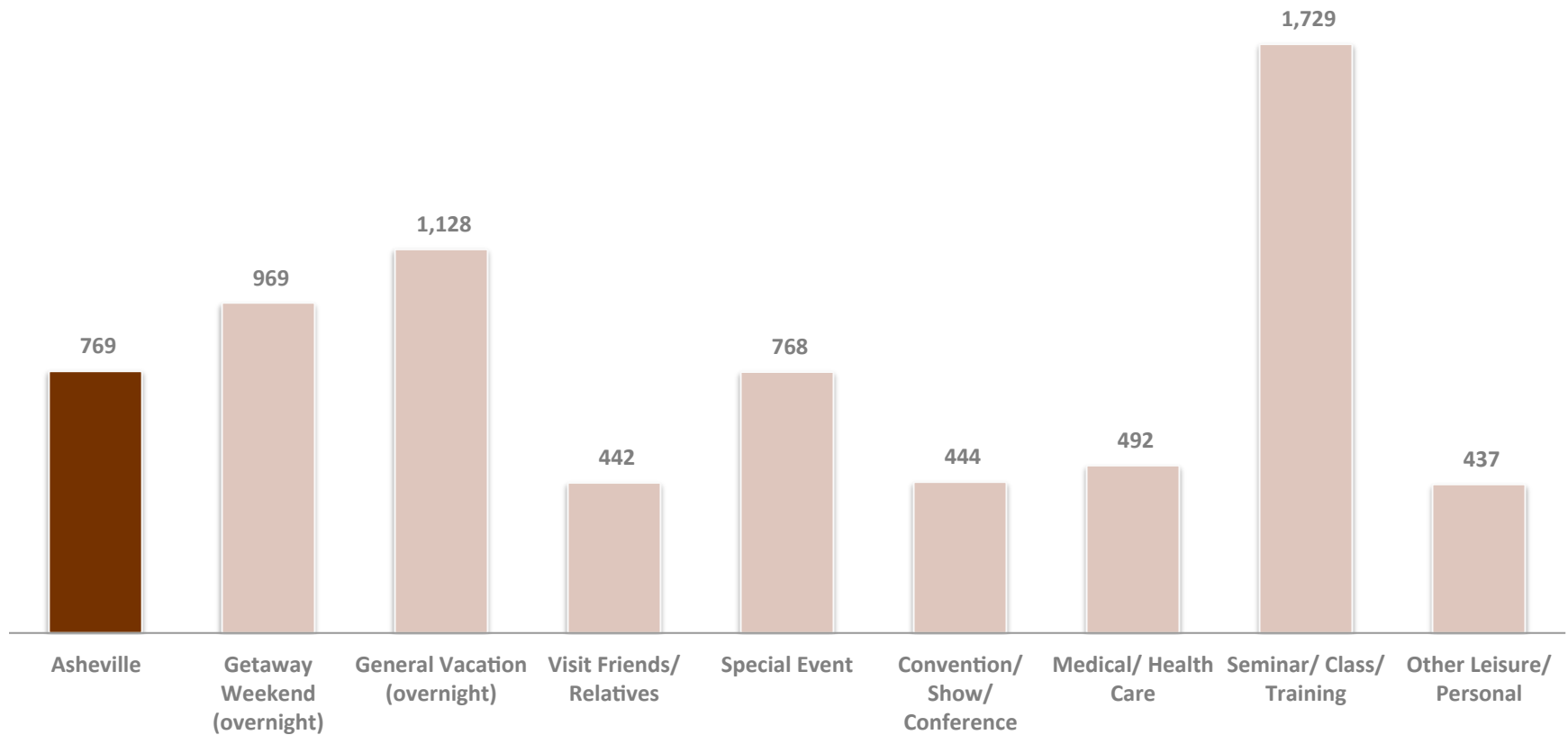


Chart 33 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Purpose of Stay Comparison

TRIP CHARACTERISTICS

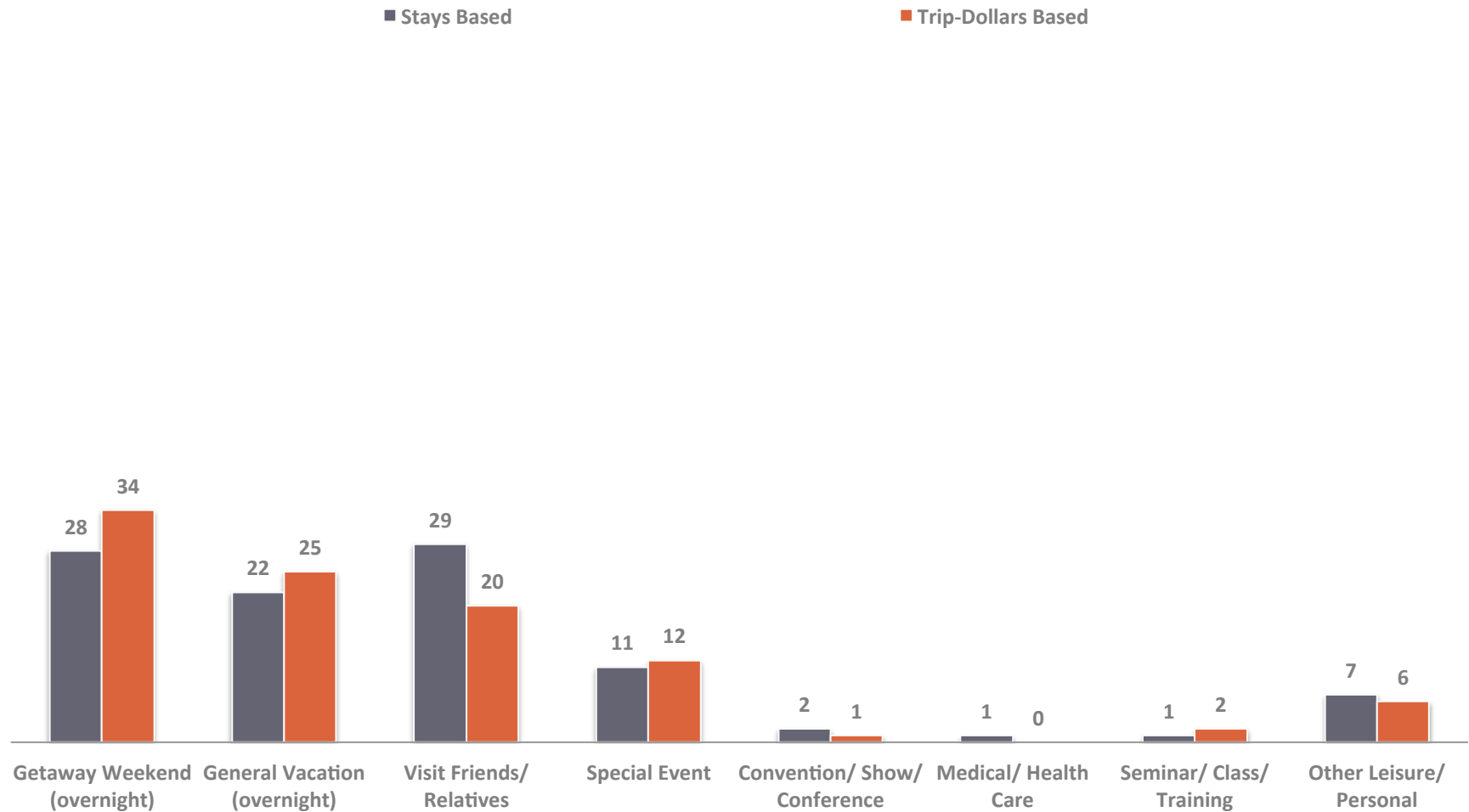


Chart 34 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Travel Party Composition: U.S. and Asheville

TRIP CHARACTERISTICS



Chart 35 • Segment: 2012-2014 Overnight Leisure Stays (%) • Asheville N = 587 household count

GLOSSARY

Children Present
Is defined as one or more adults accompanied by one or more persons under age 18. The child necessarily has to live in the household.

MM/FF
Include either two females or two males from different households traveling together.

Average Travel Party Size Overview: U.S. and Asheville

TRIP CHARACTERISTICS

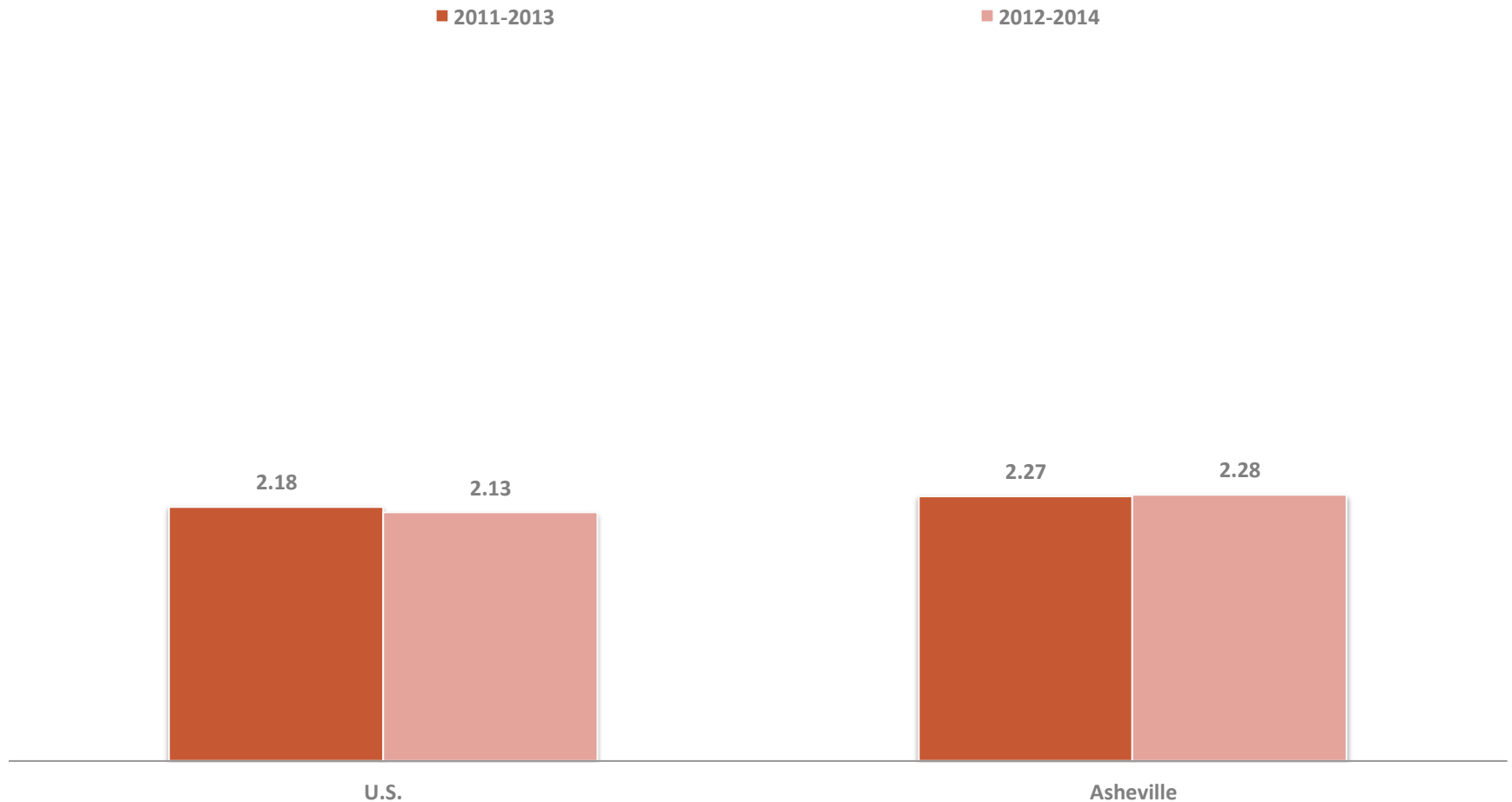


Chart 36 • Segment: 2011-2013/2012-2014 Overnight Leisure Stays • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Travel Party Composition

TRIP CHARACTERISTICS

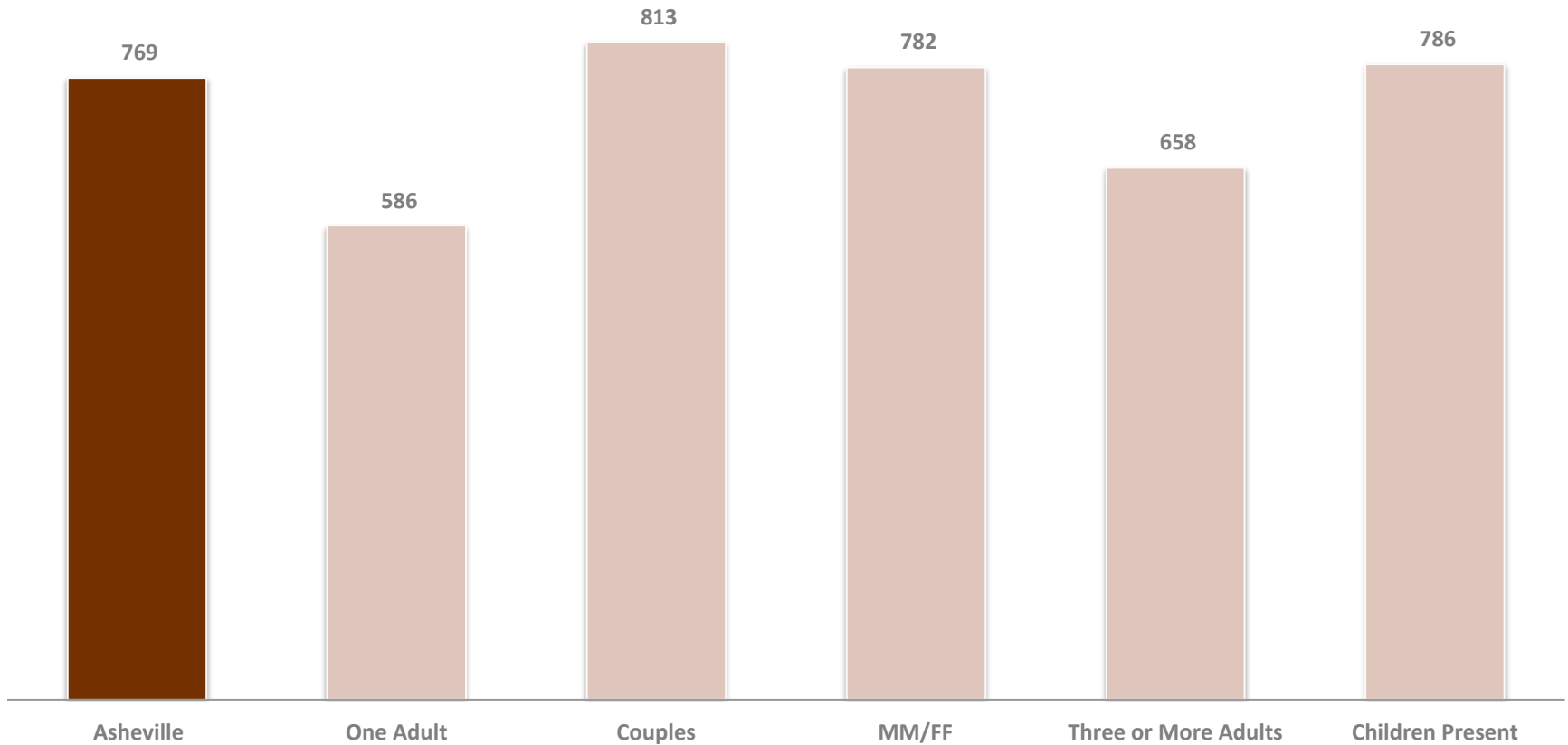


Chart 37 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Travel Party Comparison

TRIP CHARACTERISTICS

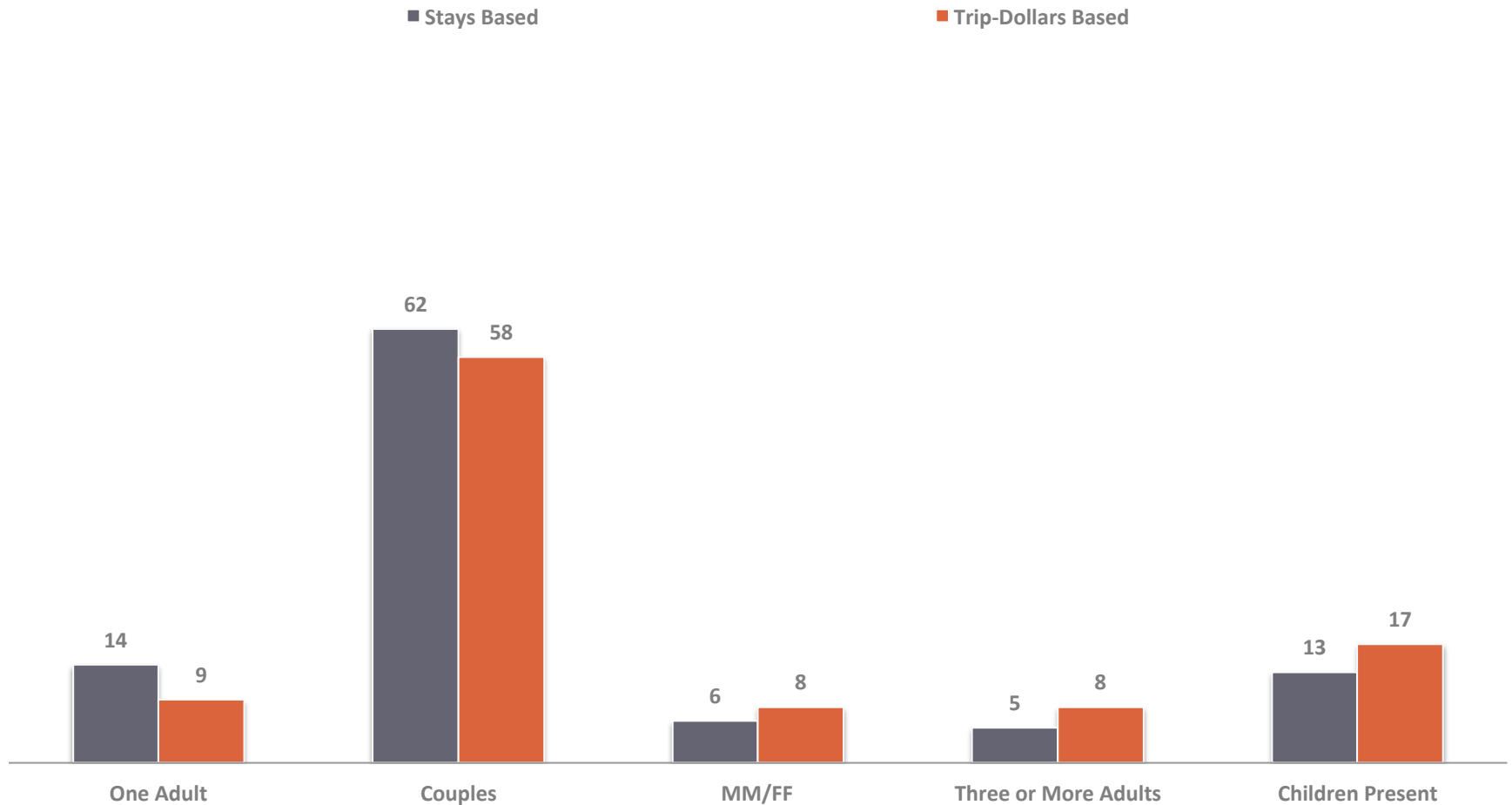


Chart 38 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Stay Length Distribution: U.S. and Asheville

TRIP CHARACTERISTICS

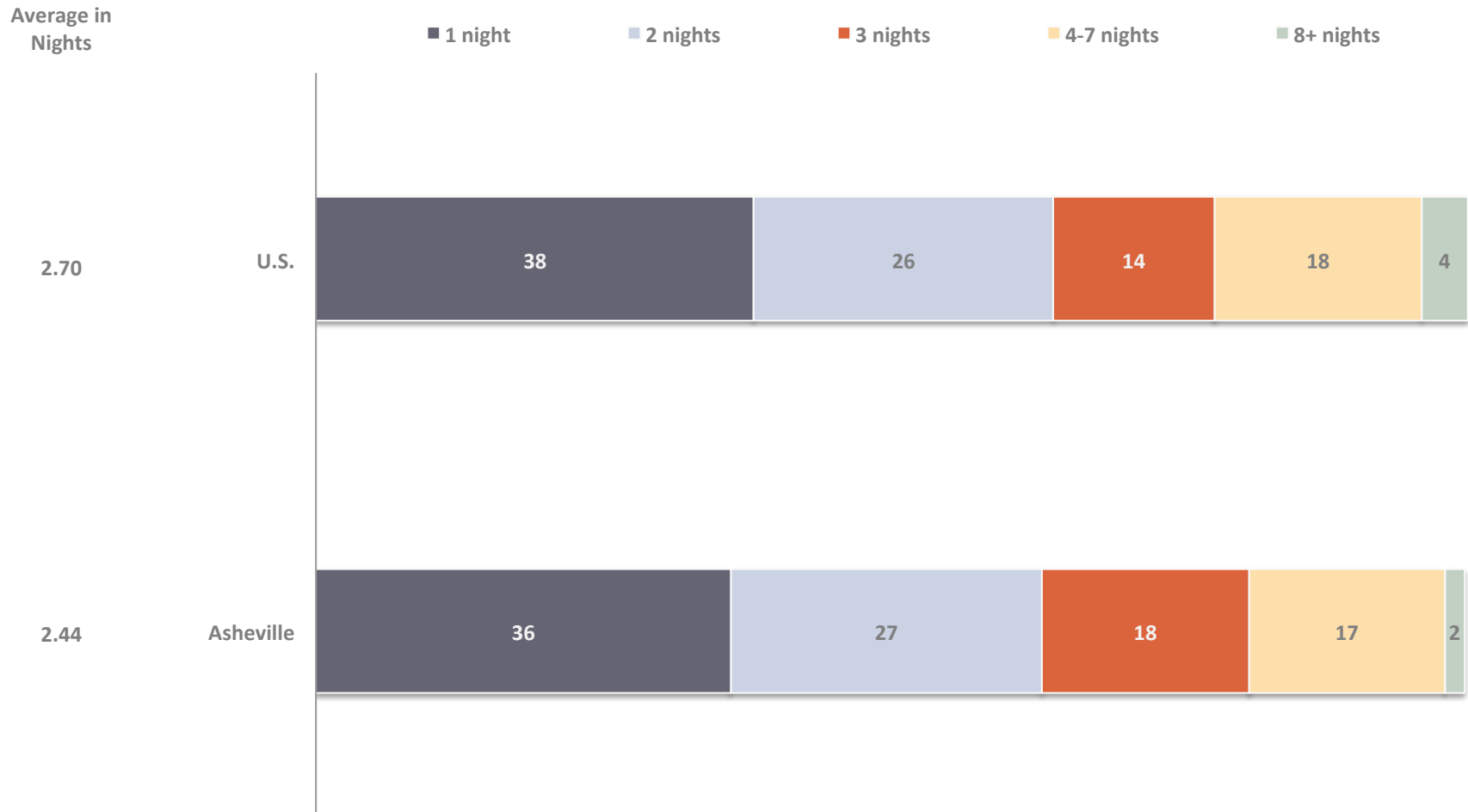


Chart 39 • Segment: 2012-2014 Overnight Leisure Stays (%) • Asheville N = 587 household count

Average Stay Length Overview (in days): U.S. and Asheville

TRIP CHARACTERISTICS

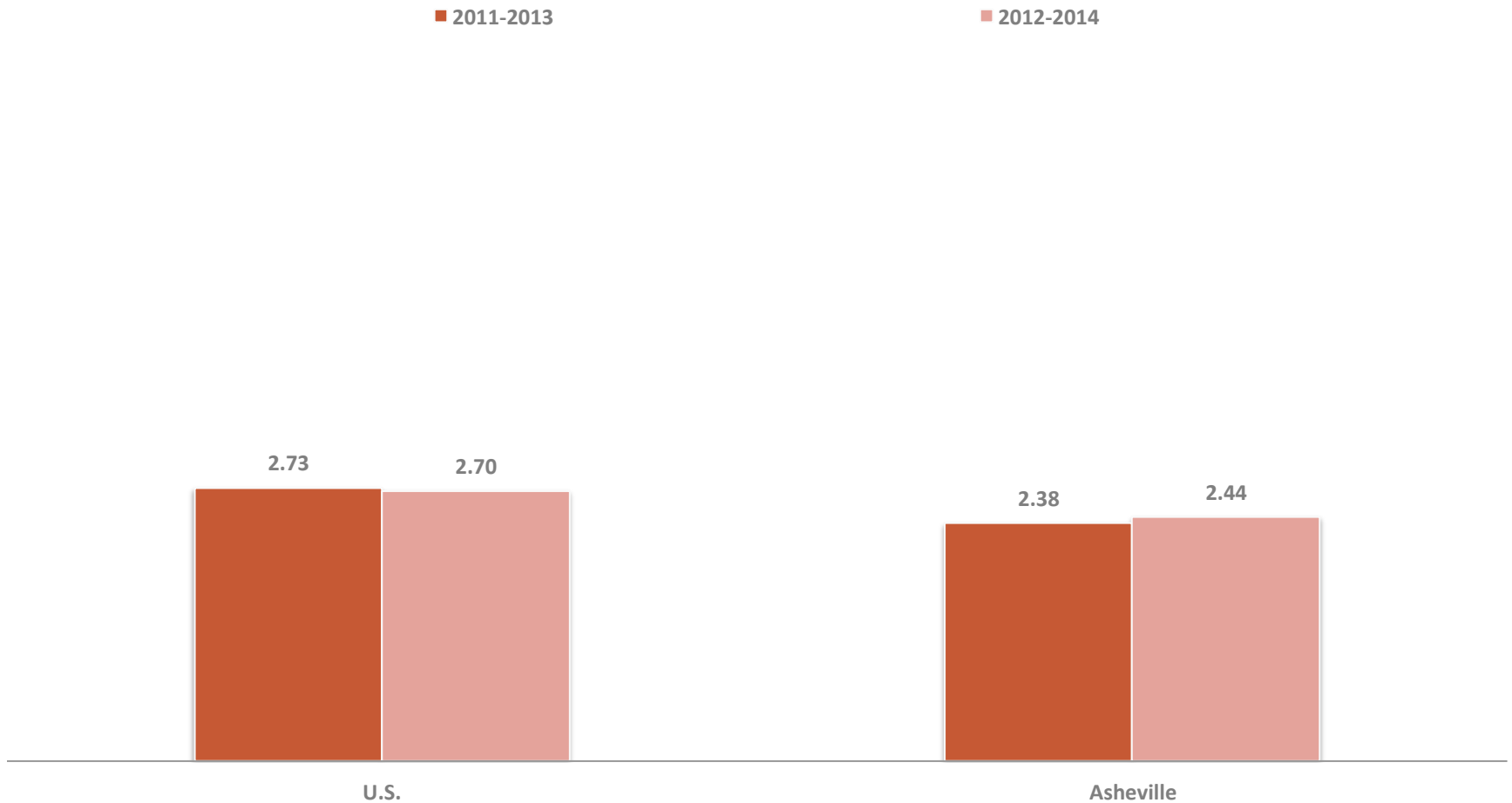


Chart 40 • Segment: 2011-2013/2012-2014 Overnight Leisure Stays • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

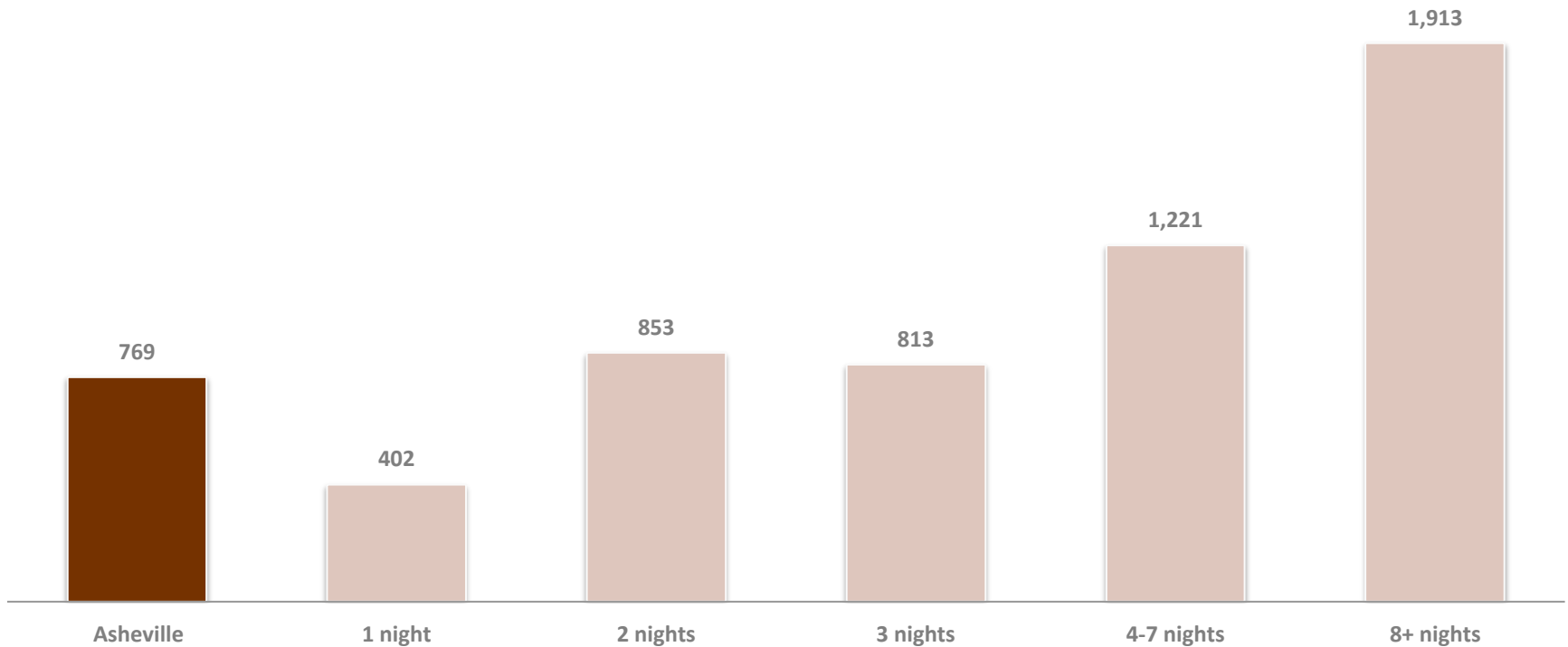


Chart 41 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 570 household count

Asheville Stay Length Comparison

TRIP CHARACTERISTICS

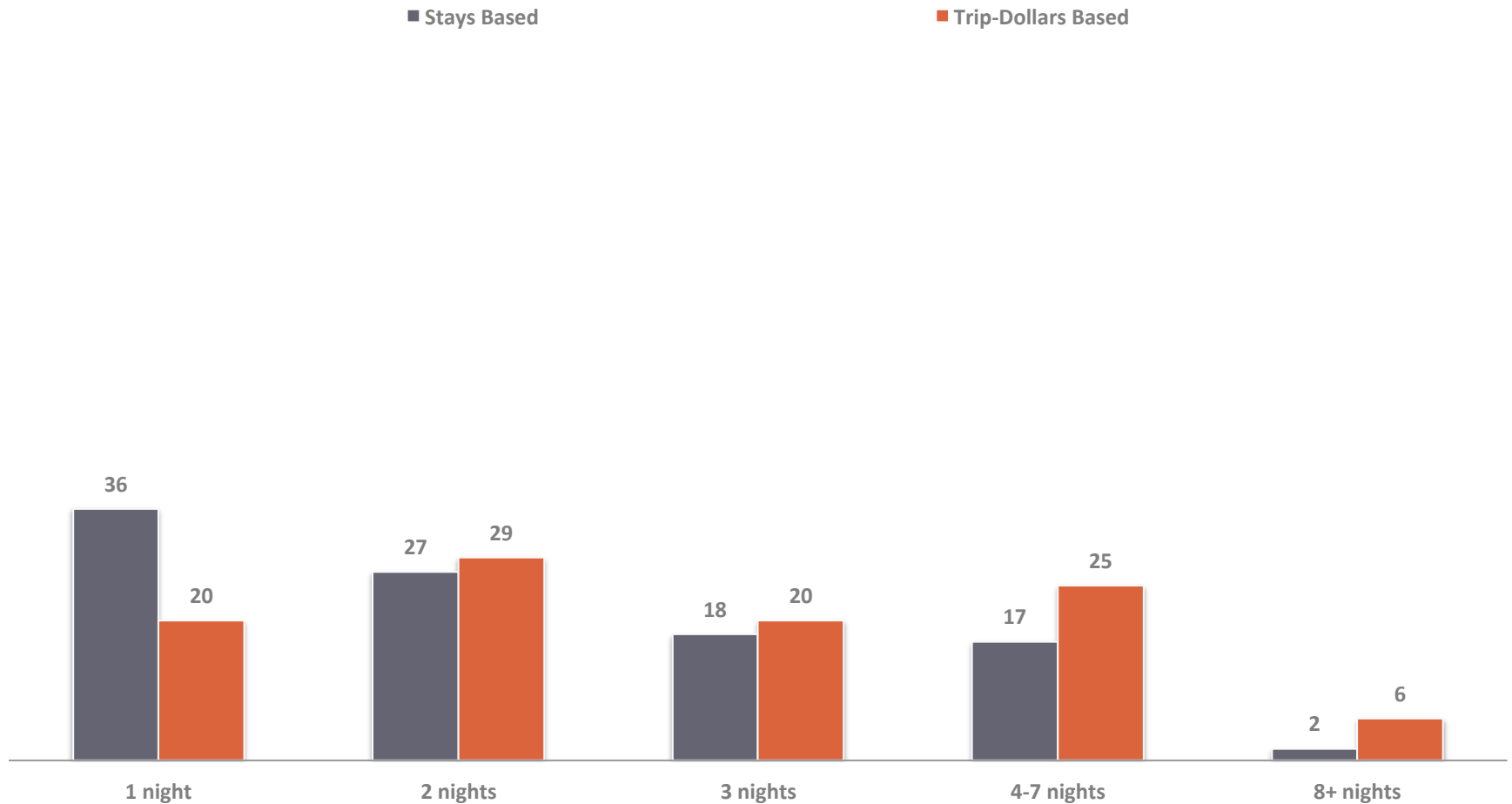


Chart 42 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Daily Spending Per Person by Category: U.S. and Asheville

TRIP CHARACTERISTICS



Chart 43 • Segment: 2012-2014 Overnight Leisure Person-Days (%) • Asheville N = 569 household count

Asheville Activity Participation

ACTIVITY PARTICIPATION

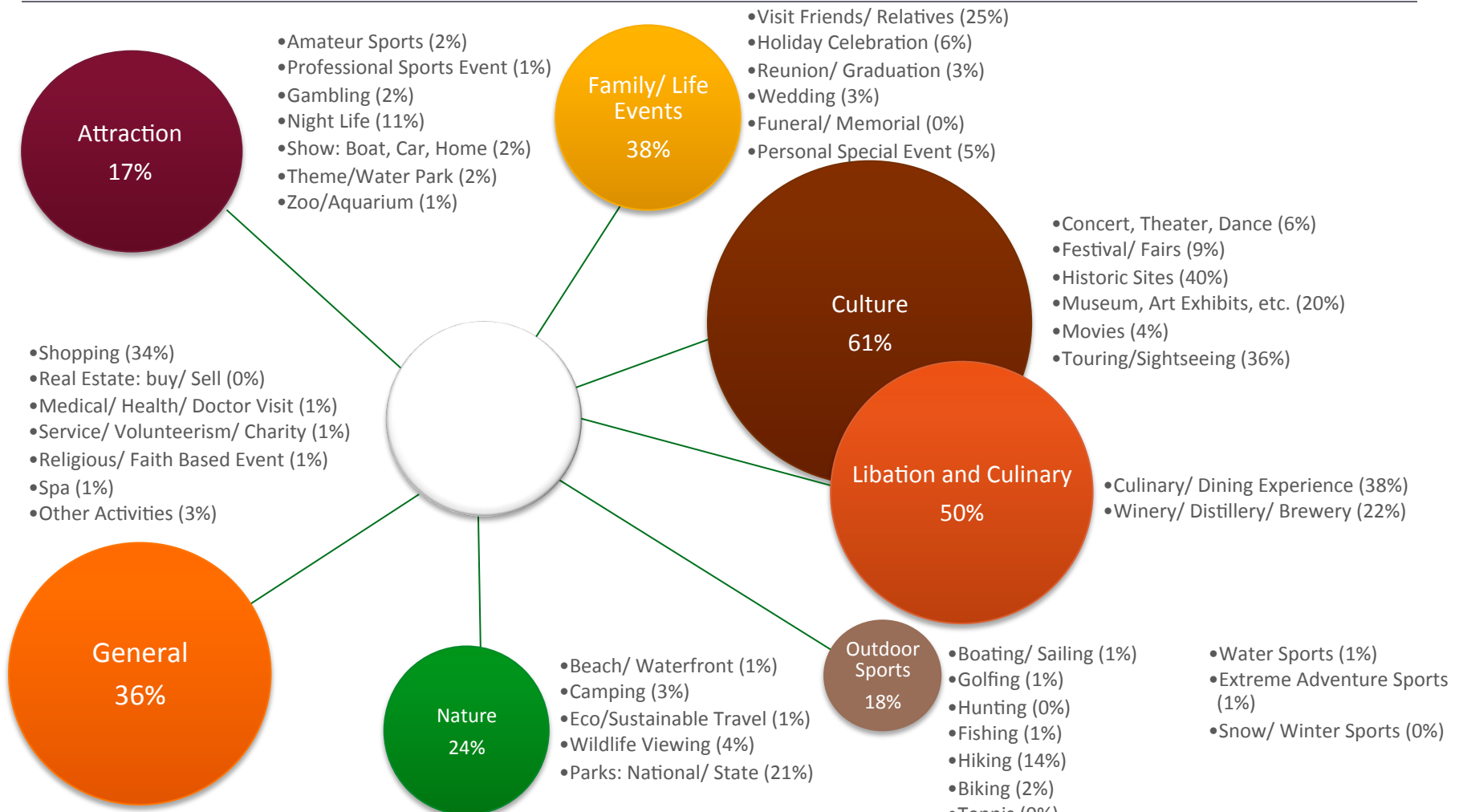


Chart 44 • Segment: 2012-2014 Overnight Leisure Stays (%) • Asheville N = 587 household count

Top Activities at the Destination

ACTIVITY PARTICIPATION

	U.S.	Asheville		U.S.	Asheville
Historic Sites	26%	40%	Theme/Amusement/Water Parks	3%	2%
Culinary/Dining Experience	23%	38%	Show: Boat, Car, Home	3%	2%
Touring/Sightseeing	22%	36%	Professional Sports Event	3%	1%
Shopping	6%	34%	Religious/Faith Based Conference	3%	1%
Visit Friends/Relatives (general visit)	2%	25%	Extreme/Adventure Sports	2%	1%
Winery/Distillery/Brewery Tours	8%	22%	Eco/Sustainable Travel	2%	1%
Parks (national/state, etc.)	9%	21%	Zoo/Aquarium	5%	1%
Museums, Art Exhibits etc.	7%	20%	Spa	2%	1%
Hiking	7%	14%	Beach/Waterfront	3%	1%
Nightlife (bar, nightclub, etc.)	6%	11%	Fishing	2%	1%
Festivals/Fairs (state, craft, etc.)	7%	9%	Medical/Health/Doctor Visit	4%	1%
Concerts/Theatre/Dance etc.	11%	6%	Water Sports	4%	1%
Holiday Celebration (Thanksgiving, July 4th etc.)	4%	6%	Service/Volunteerism/Charity	1%	1%
Other Personal Celebrations (2012+)	5%	5%	Boating/Sailing	1%	1%
Wildlife Viewing (birds, whales, etc.)	4%	5%	Golfing	2%	1%
Movies	4%	4%	Funeral/Memorial	1%	0%
Reunion/Graduation	2%	3%	Real Estate (buy/sell)	1%	0%
Camping	6%	3%	Snow/Winter Sports	1%	0%
Amateur Sports (attend/participate)	2%	3%	Business/Work (2012+)	2%	0%
Wedding	2%	3%	Hunting	0%	0%
Biking	2%	2%	Tennis	1%	0%
Gambling (slots, cards, horses, etc.)	1%	2%	Other	1%	3%

Chart 45 • Segment: 2012-2014 Overnight Leisure Stays (%) • Asheville N = 587 household count

GLOSSARY

Asheville Activity Index

ACTIVITY PARTICIPATION

The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in Asheville are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for average U.S. destinations.

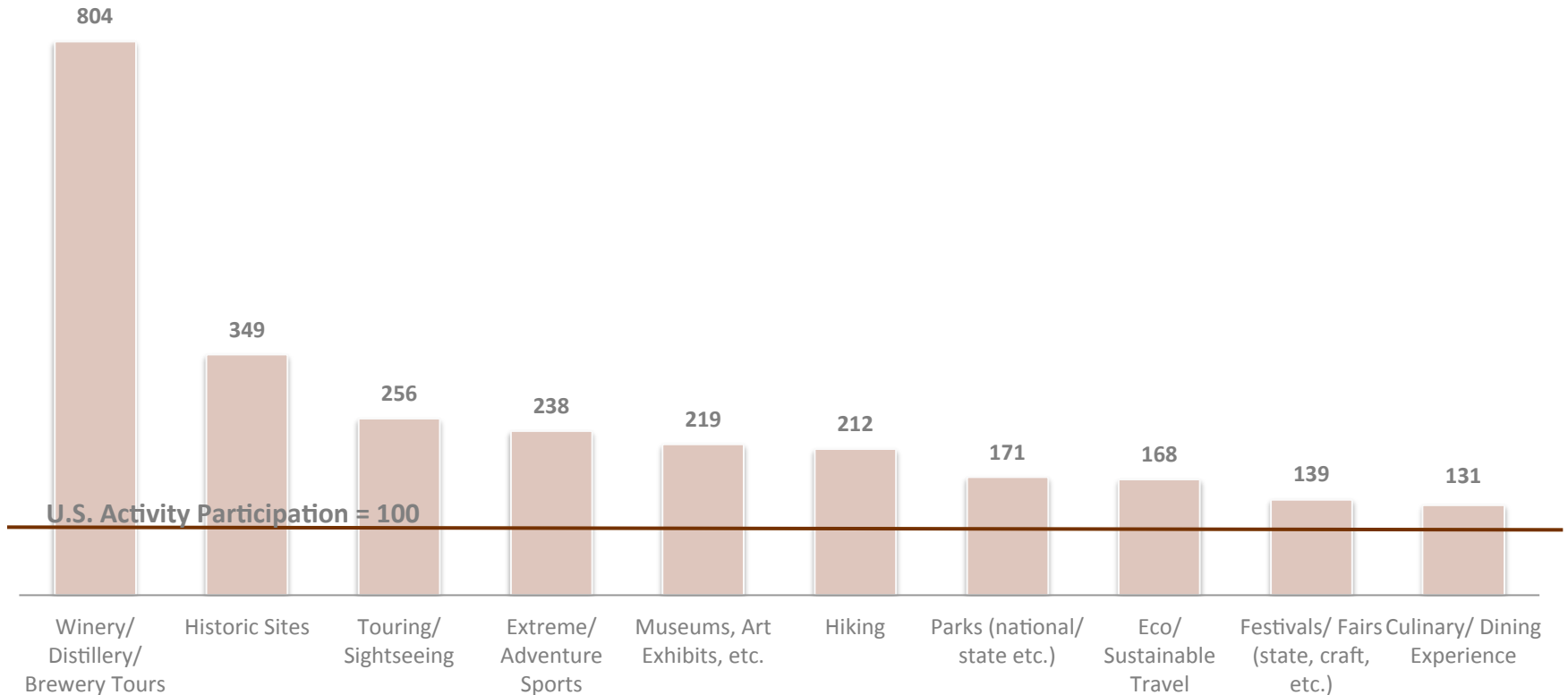


Chart 46 • Segment: 2012-2014 Overnight Leisure Stays • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION



Chart 47 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 587 household count

Asheville Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

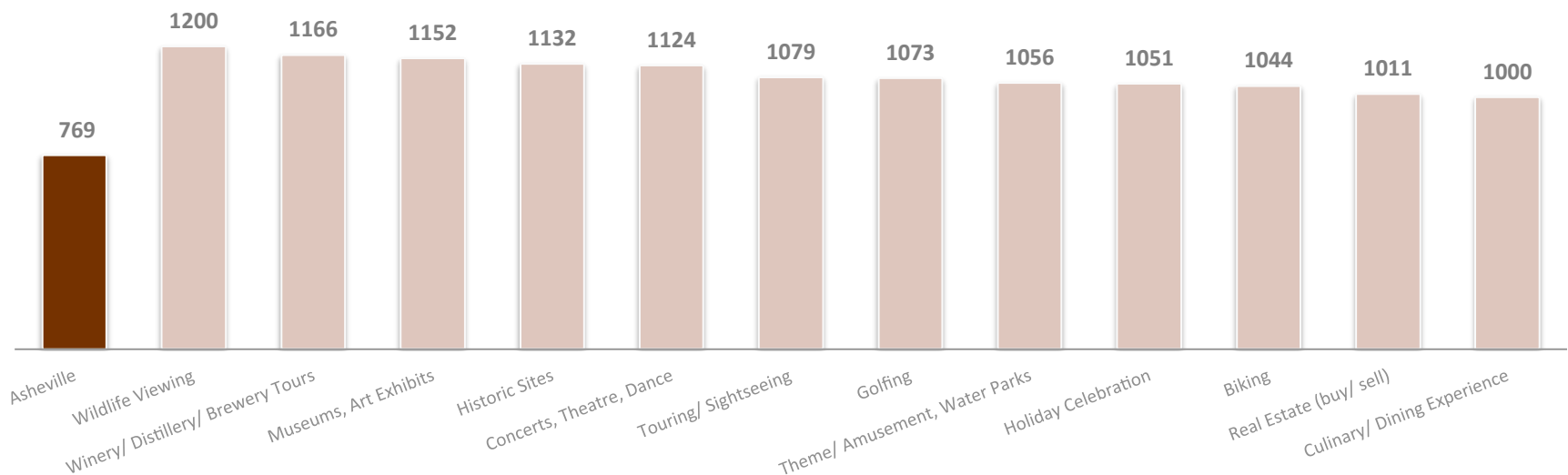


Chart 48 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 587 household count

Asheville Activity Comparison

ACTIVITY PARTICIPATION

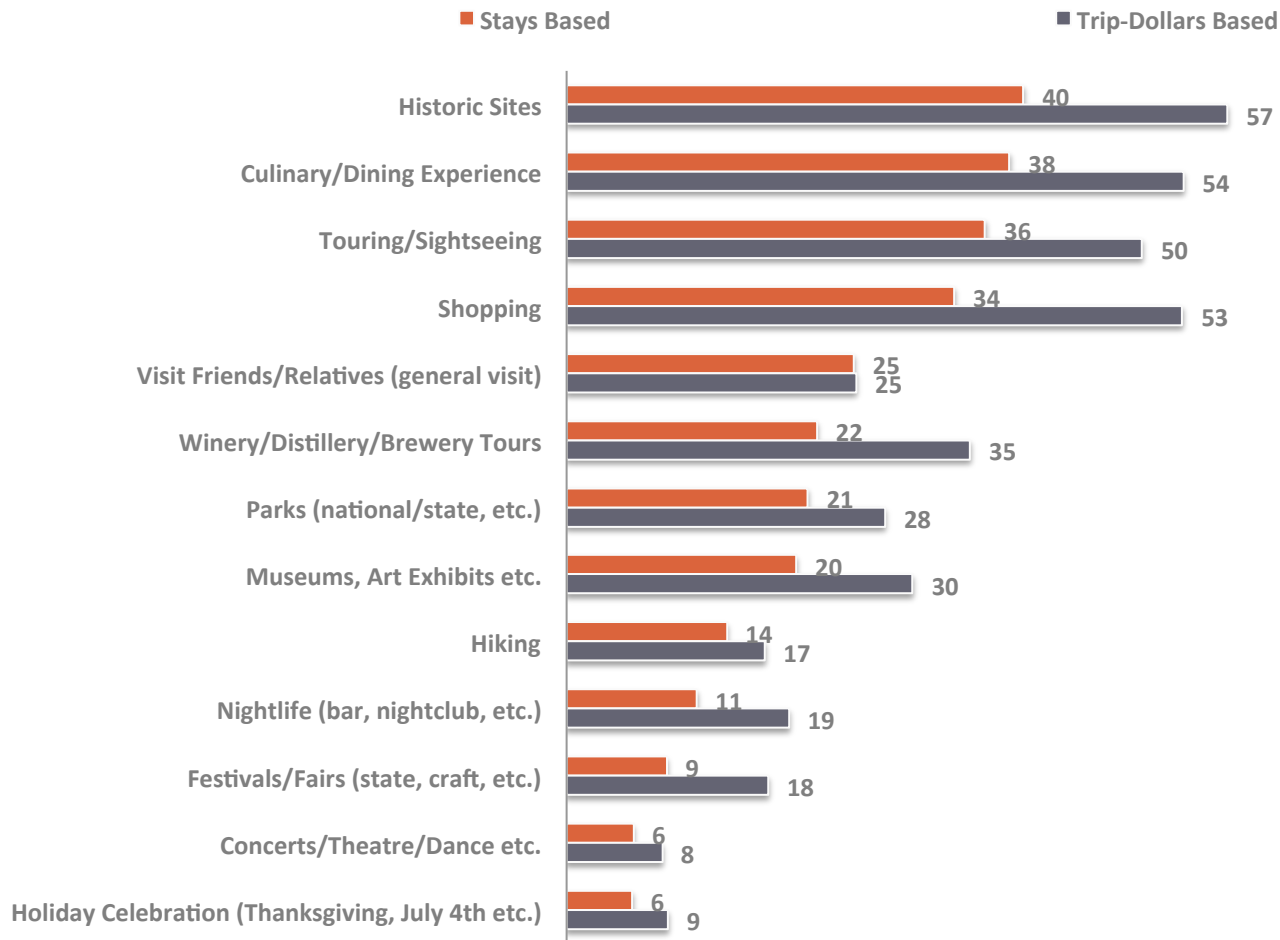


Chart 49 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Asheville Activity Comparison

ACTIVITY PARTICIPATION

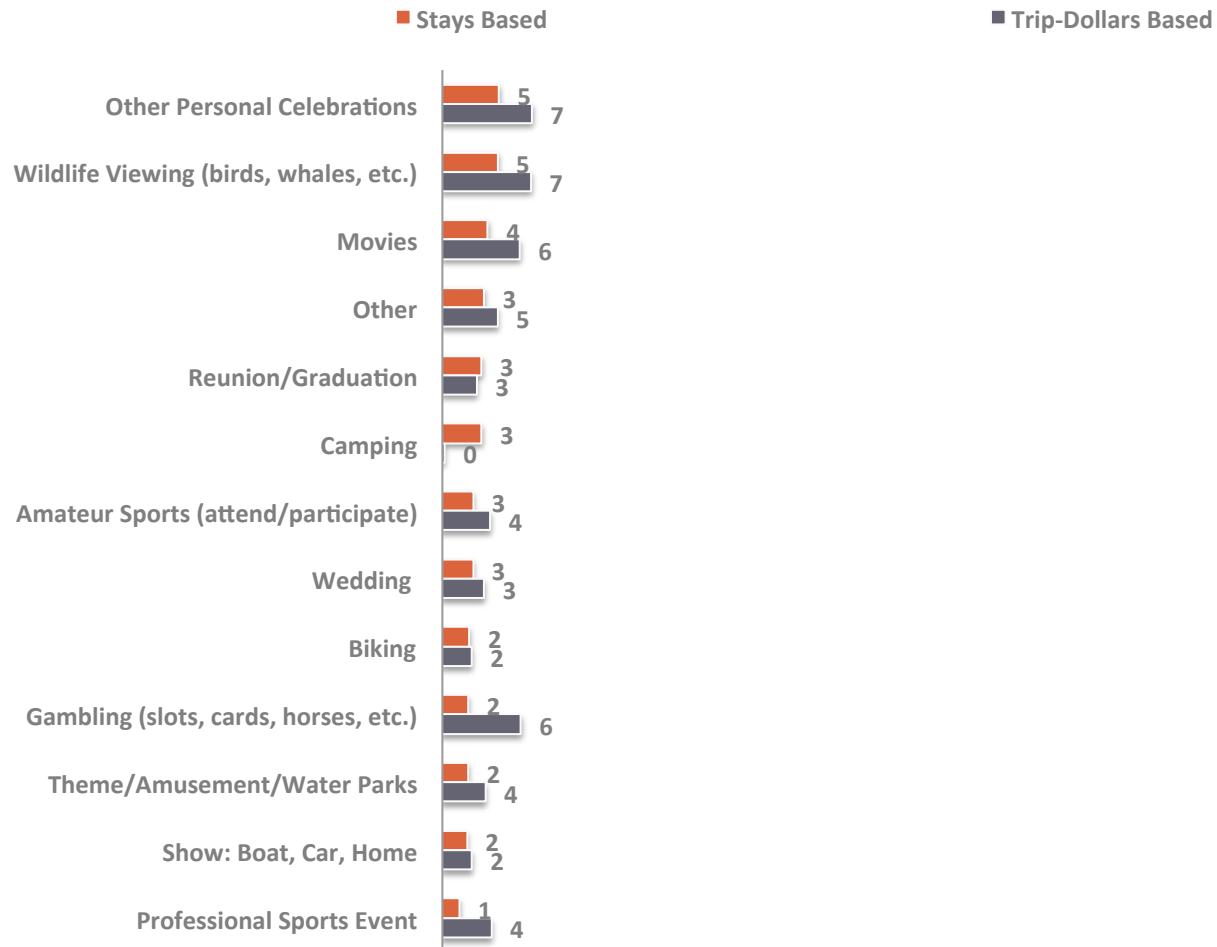


Chart 50 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 587 household count

Accommodation Type: U.S. and Asheville

ACCOMMODATION

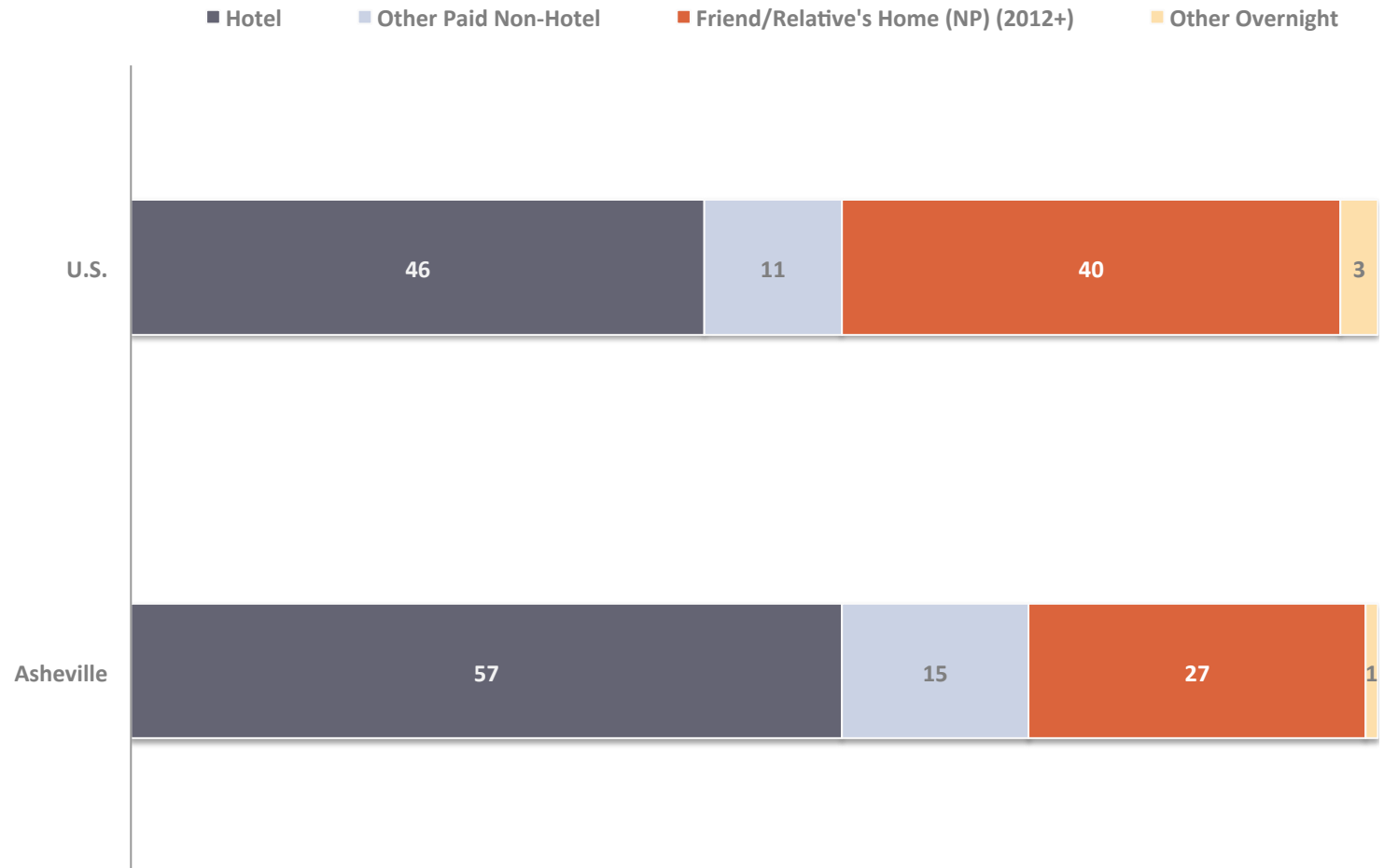


Chart 51 • Segment: 2012-2014 Overnight Leisure Stays (%) • Asheville N = 367 household count

Asheville Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

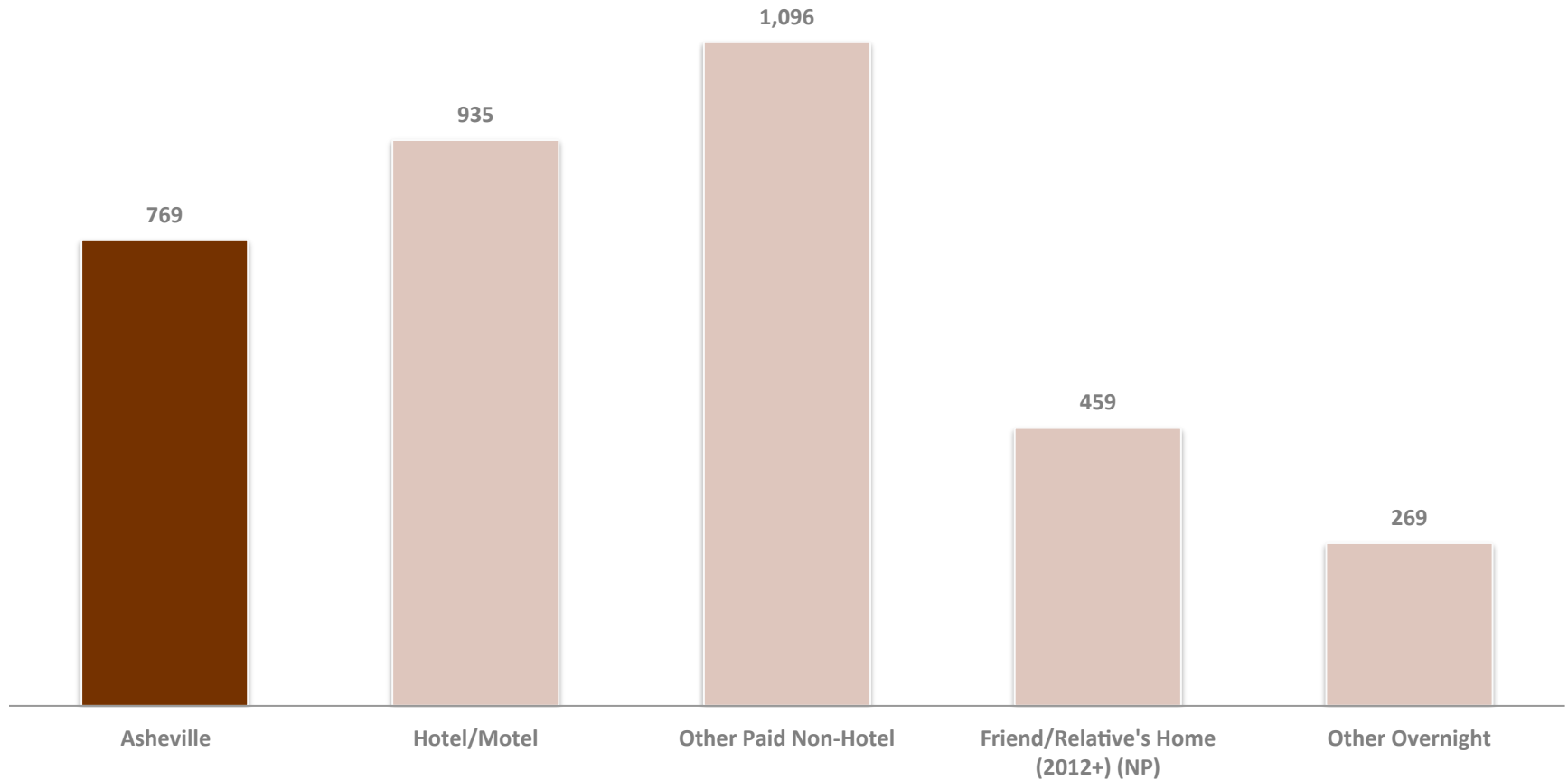


Chart 52 • Segment: 2012-2014 Overnight Leisure Stays (\$) • Asheville N = 349 household count

Asheville Accommodation Type Comparison

ACCOMMODATION

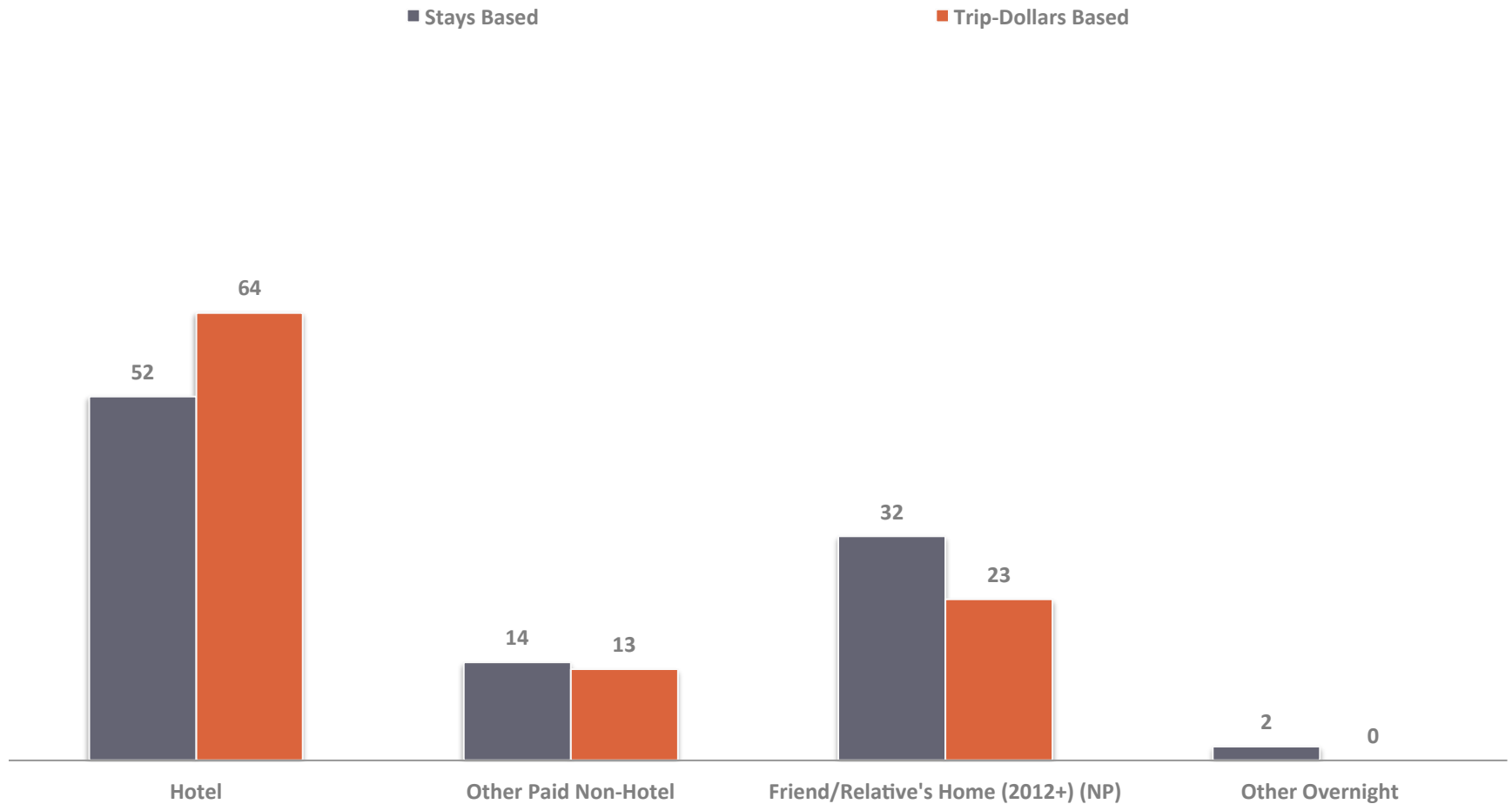
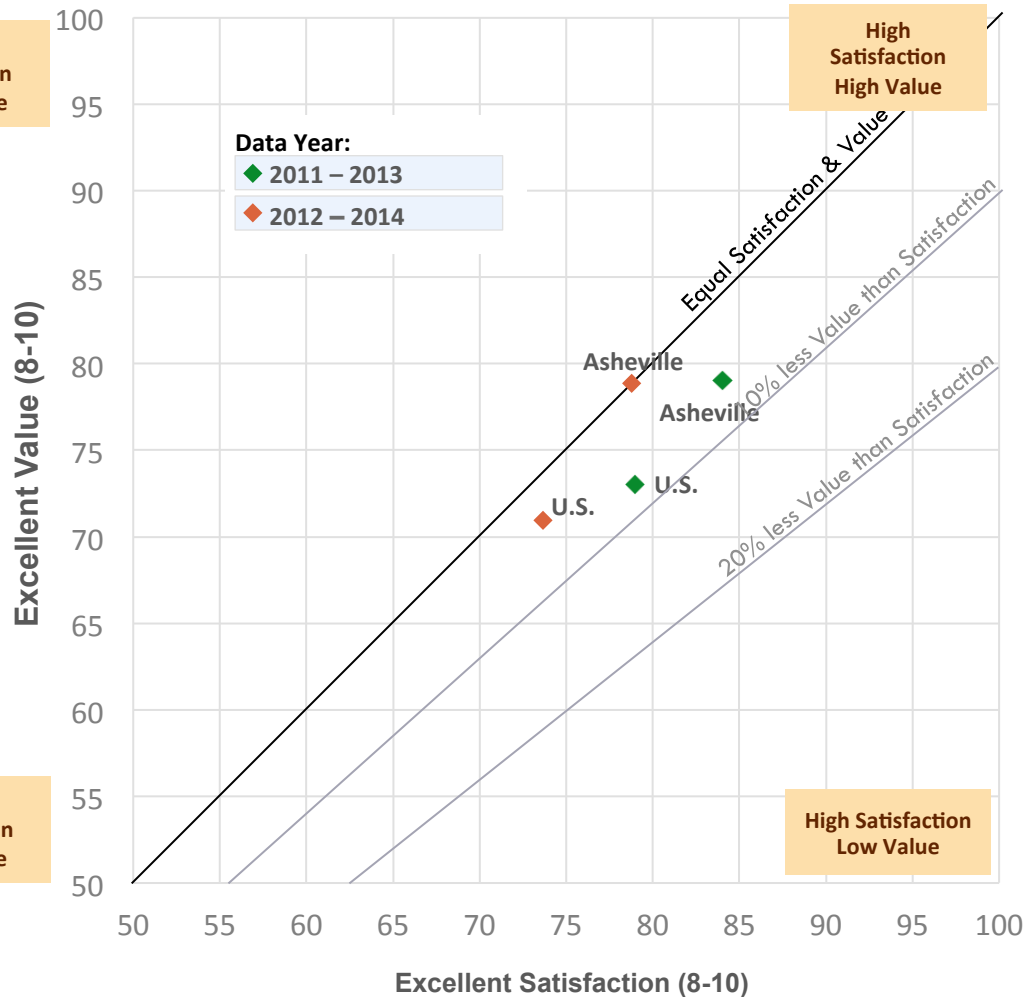


Chart 53 • Segment: 2012-2014 Overnight Leisure (%) • Asheville N = 367 household count

Asheville Ratings

PERFORMANCE RATINGS



Satisfaction and Value ratings may be combined into a matrix which places each destination in the location where Satisfaction and Value intersect.

Destinations or segments fall into one of four quadrants. Those that are in the High Satisfaction/High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but they are likely to spend more, as well as provide invaluable word-of-mouth recommendations. The graph to the left shows these data for Asheville and the US average.

Chart 54 • Segment: 2011-2013/2012-2014 Overnight Leisure Person-Stays (%) • Asheville N = 587 household count

Appendix

Statistical References

Confidence Interval

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage Findings in Report or Data Tables as follows:

Total Travel	Sample Size for 2012-2014	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
U.S.	129,666	0.0%	0.1%	0.1%	0.1%	0.2%
Asheville	575	0.7%	1.2%	1.8%	2.6%	3.4%

Example:

If the auto travel finding for Overnight Leisure travel to Asheville, NC is 95% in 2012 – 2014 and the sample size is 575 using the chart to the right we can say that at the 90% level of confidence the proportion ranges between 93.8% and 96.2%.

Significance Testing

The chart below compares two proportions from different samples for statistical significance.

Instructions: Enter the proportion for each sample and sample size in the appropriate cells in the data input section, using the Z Score Table, compare the resulting Z score with the Z score corresponding to your desired confidence level. If the resulting Z score is greater than the table Z score, the difference between the two proportions is statistically significant. If the resulting Z score is lower, there is no significant difference.

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	93%	95%		(+/-) 1.96	95%
Sample Size (n)	524	523	-1.36	(+/-) 1.64	90%

Example:

If the Overnight Leisure travel for car travel to Asheville, NC is 95% in 2012-2014 and was 93% in 2011-2013, using the chart to the right, we can say that the actual proportion change is statistically not significant since the resulting Z score (-1.36) is smaller than the table Z score (+/-1.64).

Research Methodology

DKSA's **TRAVEL PERFORMANCE/MonitorSM** is a comprehensive study measuring the travel behavior of US residents. DKSA contacts 50,000 distinct U.S. households monthly and has done so since 1991. DKSA is able to provide current behavior and long term trended analyses on a wide range of travel.

DKSA data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are Origin State, Age, Income, Education, Gender, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DKSA.

Both traveling and non-traveling households are surveyed each month enabling DKSA to generate the best estimate of travel incidence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases. "Travel" is defined as either an overnight trip defined as going *someplace, staying overnight and then returning home* or as a day trip defined as a *place away from*

home and back in the same day. Respondents report travel behavior for each stay of each trip; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of stay and activities, expenditures, mode of transportation, party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to ensure that the responses are not influenced by a pre-listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.

