

HAY NOW & NEXT

VISITNC  SMOKIES

QUANTITATIVE RESEARCH COMPREHENSIVE REPORT

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OVERVIEW

The Haywood County Tourism Development Authority (hereafter HC) is charged to promote tourism to Haywood County, North Carolina. This study was conducted by James F. Petrick, Ph.D., Professor and Research Fellow in Texas A&M's Department of Recreation, Parks and Tourism Sciences and his consultancy (Tourvey), in cooperation with Crawford Agency to aid HC in developing a long-term brand strategy. The purposes of this study were to determine specific target markets for HC to target and to understand how to potentially best market to them.

The major objectives of this study were:

1. To determine unaided and aided brand awareness
2. To identify the primary tourism attributes that visitors and prospects believe HC has to offer,
3. To develop profiles of current visitors to HC,
4. To determine which attributes HC offers that can be grouped together,
5. To determine target markets (clusters) for HC, based on the attributes that HC has to offer,
6. To profile the resultant target markets based on their travel behaviors and demographics,
7. To determine differences between the resultant target markets and their: likelihood to visit, perceptions of value and perceptions of the attributes HC offers, and
8. To determine the best marketing mediums to use for attracting target markets.

DATA COLLECTION PROCEDURES

Data collection was conducted using a paid panel from CINT, inc. CINT is a global leader in panel research and claims to have the world's largest consumer network for online, survey, based research. The sample was intended to mimic the population of adults with a residence in the following eleven metropolitan statistical areas: Charlotte-Concord-Gastonia, NC-SC; Atlanta- Sandy Springs-Alpharetta, GA; New York-Newark-Jersey City, NY-NJ-PA; Knoxville, TN; Orlando- Kissimmee-Sanford, FL; Chattanooga, TN-GA; Tampa-St. Petersburg-Clearwater, FL; Nashville- Davidson-Murfreesboro-Franklin, TN; Augusta-Richmond County, GA-SC; Greensboro-High Point, NC; Greenville-Anderson, SC; and Asheville, NC. A total of 630 responses were collected. Of these, 37 respondents either completed the survey too quickly or did not have valid responses and were removed from analysis. The final sample included 593 persons from the 11 regions with the fewest responses from the Anderson-Greenville area (n = 45) and the most from Charlotte, NC (n = 72). Quota sampling was used to help ensure a somewhat representative sample from all 11 regions based on gender. The survey was developed after multiple meetings with HC and included best practices from similar studies. The complete Panel Survey with the results from each question can be found in APPENDIX A.

PROFILE OF RESPONDENTS

- Just over one half (51.3%) of respondents were female, while fewer were male (48.4%) and very few (0.3%) stated “other.”
- The average age of respondents was 43.7 and ranged from 19 to 82 years old.
- The median income of respondents was \$45,000-\$54,999 and 9.7% had incomes over \$125,000.
- On average, respondents stated they take 2.91 different vacations of 4 days or more per year and average 15.0 days per year of pleasure travel.
- Respondents were most likely to claim their permanent residence as Tennessee (20.6%), Florida (18.2%), North Carolina (16.5%), Georgia (16.4%), South Carolina (14.7%) or New York (6.6%).
- Respondents most often travel with their significant other (29.9%). Respondents travel less often with their significant other and children (22.3%), other family (16.4%), solo (13.2%), children (7.4%), friends (7.1%), other (3.4%) or coworkers (0.3%).
- On a scale from 1 (very low) to 5 (very high) the most desirable travel party types for respondents were: family with adults (3.46), couples (3.33), pet friendly (3.20), family with kids (3.04), solo/individual (3.03), girlfriends (3.00) and guy friends (2.69) (Table 1).
- When asked to name towns or cities near the Great Smoky Mountains (Unaided Recall) 7.9 percent of respondents could name at least one town/city.
 - Almost one half (47.1%) of respondents had heard of Haywood County after seeing a map of the area (Aided Recall).
- More than one third (33.4%) had visited HC in the past while more than one half (56.4%) had visited Great Smoky Mountains National Park.
- When asked how familiar they were with HC, almost one third (32.8%) were either somewhat familiar (19.7%), mostly familiar (7.0%) or extremely familiar (6.1%).
 - Approximately one fourth (27.4%) were either mostly unfamiliar (13.6%) or somewhat unfamiliar (13.8%) while 39.9 percent were not at all familiar.
- When asked how important different mediums would be when planning a vacation from 1 “not at all important” to 5 “very important” the most important sources were: friend

or family member (3.91), search for online reviews (3.67) website of a specific destination (3.64), Travel Guide/Travel Book (3.62) and Google (3.62) (Table 2).

- Respondents rated the following types of leisure trips the highest on how well they thought HC could deliver them, on a scale from 1 (very low) to 5 (very high): Sight Seeing (3.92), Wildlife Watching (3.83), Camping (3.77), Photography (3.74), Hiking (3.70), Dining/Culinary (3.64), Fishing (3.63) and Canoeing/Rafting/Kayaking (3.60) (Table 3).

VISITOR PROFILE

Responses in this section are only from those who had stated they had ever been to Haywood County (n = 197).

- On their most recent trip to HC, visitors were most likely to have visited: Great Smoky Mountains National Park (20.7%), Blue Ridge Parkway (19.6%), Maggie Valley (16.5%) or Waynesville (8.8%).
 - Places they were less likely to visit included: Canton (5.6%), Clyde (5.6%), Lake Junaluska (5.6%) or None of the Above (1.0%).
- Respondents who had previously visited HC and had stayed overnight at some point were most likely to stay in paid lodging in the following cities: Maggie Valley (12.6%), Waynesville (6.2%), Canton (4.6%), Lake Junaluska (3.7%), Clyde (3.2%), Other (1.5%), No Paid Lodging (1.0%).
- Those who have visited took approximately the following number of OVERNIGHT TRIPS: in the past 2 years (1.56), between 2-5 years (2.06), between 6-10 years (3.52), 11 or more years (4.85) trips.
 - Similarly, visitors have taken the following number of DAY TRIPS: in the past two years (2.1), between 2-5 years (5.5), 6-10 years (6.9), 11 or more years (12.1).
- In total, visitors' travel parties spent \$1,133.74 on average per trip to HC. Of this total, they spent the most on shopping (\$294.70), hotel & lodging (\$285.92) and food (\$232.02). Visitors spent less money on entertainment (\$194.03) and other (\$127.07).
- Including themselves, there were an average of 3.04 adults in visitors' most recent visit to HC.
- Visitors were most likely to have traveled the following distances to visit HC: 100 to 250 miles (44.2%), 251-500 miles (22.3%), less than 100 miles (19.3%), 501-1000 miles (10.7%) or more than 1,000 miles (3.6%).

- Less than one-half (41.1%) of visitors stayed in a hotel/motel when they visited HC. Fewer stayed in other (17.8%), camping/RV (11.7%), Rental Home (e.g., Airbnb, VRBO) (10.7%), private home (9.6%), or bed and breakfast (9.1%).
- The primary purpose of visitors' trip(s) to HC was most likely to be a getaway weekend (24.4%), to visit friends/family (17.3%), general vacation (15.0%), special event (3.6%), business (3.0%) or other (2.2%).
- On a scale from 1 (very low) to 5 (very high), visitors rated Haywood County's performance on the following vacation types or activities the highest: Wildlife Watching (3.95), Sightseeing (3.92), Photography (3.88), Camping (3.85), Hiking (3.79), Dining Culinary (3.75) and Fishing (3.75) (Table 3).
- On a scale with 1 (below expectations), 2 (meets expectations) and 3 (exceeds expectations), HC exceeded the expectations for all visitor travel party types: family (2.25), family with adults (2.23), couple/s (2.22), multi-generational (2.18), family with kids (2.18), pet friendly (2.14), girlfriends (2.13) and guy friends (2.09) (Table 4).

EVALUATION OF HC AS A DESTINATION

- Respondents who were aware of HC as a vacation destination, or who had visited in the past, rated the following leisure trip experiences as the most desirable (Important) on a scale from 1 (very low) to 5 (very high): Sightseeing (3.85), Dining/Culinary (3.63), Shopping (3.50), Festivals (3.46), Wildlife Watching (3.38), Live Theater/Concerts (3.23), Museums (3.20), Camping (3.12), Photography (3.11), Canoeing/Rafting/Kayaking (3.03) and Arts & Crafts (3.00). A full listing of the rating of desired leisure trip experiences is displayed in Table 5.
 - Respondents rated the same leisure trip experiences on how well they thought HC would perform them. The top-rated trip experiences for PERFORMANCE were: Sightseeing (3.92), Wildlife Watching (3.83), Camping (3.77), Photography (3.74), Hiking (3.70), Dining/Culinary (3.64), Fishing (3.63) and Canoeing/Rafting/Kayaking (3.60) (Table 6).
- Placing the evaluations of importance (items in Table 5) and performance (items in Table 6) onto an Importance/Performance grid (Figure 1) suggests the following.
 - Areas to keep up the good work: sightseeing, dining/culinary, wildlife watching, shopping, camping, photography and fishing (canoeing/rafting/kayaking is borderline);
 - Areas to concentrate on: live theater/concerts, museums and festivals (arts and crafts is borderline);

- Potential priorities: hiking and canoeing/rafting/kayaking;
- Lower priority with potential (niche activities): breweries/distilleries/wineries, agritourism, climbing, birding, mountain biking, golfing and motorcycling.
- When asked how positively or negatively they would talk to others about HC, the vast majority of visitors (91.4%) stated that they would speak positively with most saying extremely positively (44.2%), followed by mostly positively (33.0%) and somewhat positively (14.2%).
 - Very few said their discussions would be neutral (8.1%) while almost none said they would speak negatively: somewhat negatively (0.0%), mostly negatively (0.0%) or extremely negatively (0.5%).
- Within the next two years almost one-half (46.4%) said they either definitely will visit HC (17.1%) or there is a high probability (29.3%). Just over one-fourth (28.0%) are unsure whether they'll visit, while another fourth (24.4%) have a low probability of visiting and few (1.2%) said they definitely will not visit.
 - On average, respondents thought they would take approximately .57 trips to HC in the next two years.
- On a scale from 1 (extremely poor value) to 10 (extremely good value), respondents felt the value they would receive for the money spent to vacation in HC would be a somewhat good value (average = 6.85).

DEVELOPMENT OF TARGET MARKETS

- Using exploratory factor analysis (EFA) on the importance (desirability) ratings of the 20 attributes revealed 4 emergent "importance" factors. Each resultant factor below represents a group of items that were rated extremely similarly by each independent respondent and suggest attributes that would be good to market together. The four resultant factors and the importance items that each include were:
 - CULTURAL EXPERIENCES: Festivals, dining/culinary, live theater/concerts, shopping, sightseeing, museums and breweries/distilleries/wineries;
 - NATURE ACTIVITIES: Camping, canoeing/rafting/kayaking, fishing and hiking;
 - PASSIVE OUTDOORS: Wildlife watching, photography, birding, arts/crafts and agritourism;
 - OUTDOOR SPORTS: Motorcycling, mountain biking, golfing and climbing.

- The four “importance factors” stated above were next placed into a Cluster Analysis to determine specific clusters (target markets). Each of the five resultant clusters suggest similar groups of people (target markets) that HC might want to market to.

Table 7 reveals the final cluster centers for each factor. The larger the number, the more important it was perceived to be by the target market. The more negative a number is, the less important it was perceived to be by the target market. The resultant clusters, the number of respondents in each cluster and a brief description of each follow:

Like-it-Alls (n = 188): Really love everything outdoors

- They prefer outdoor sports but seem to like everything HC offers.
- Most likely to be male (58.5%), youngest (38.9 years) have highest incomes (12.4% make \$125k or more), are most likely to have taken day trips (4.1), and overnight trips (5.0) within the past 10 years, are most likely to have visited HC in the past (42.6%) and are likely to take the most trips to HC in the next 2 years (mean = 5.5).

Natures (n = 102): Fans of activities in the heart of nature (e.g. camping, canoeing/rafting/kayaking, fishing, hiking), not passive pursuits

- Love nature activities (#1) and really dislike outdoor sports.
- Split evenly between males and females, are younger than average (43.6 years), have the lowest incomes (5.9% > \$125,000), have taken the second most day trips (2.8) and overnight trips (4.7) in the last 10 years and are the second most likely to have already visited HC (34.3%).

Dislikers (n = 73): Somewhat like outdoor sports (motorcycling, mountain biking, golfing, climbing), but nothing else

- Really dislike cultural activities, dislike nature activities and passive outdoors, somewhat like outdoor sports.
- Slightly less likely to be female (48.6%), have average ages (43.6 years) and incomes (7.1% > \$125,000), are the least likely to have taken day trips (0.2) in the past ten years, the least likely to have visited HC (22.2%), and expect to take the fewest trips to HC in the next 2 years (0.7).

- **Cultured (n = 131): Really like cultural activities (festivals, dining/culinary, theater, concerts, shopping, sightseeing, museums, breweries/distilleries/wineries), and dislike everything else**

- Highest on cultural experiences, like everything else except passive outdoors.
- Likely to be female (59.5%), moderate age (46.6 years) and income (9.2% > \$125k), have taken the fewest number of overnight trips in the past 10 years (0.8) and expect to visit HC 1.2 times in the next 2 years.
- **Passives (n = 96):** *Love passive outdoor activities (wildlife watching, photography, birding, arts/crafts, agritourism) and like cultural activities*
 - Least likely to desire nature activities or outdoor sports.
 - Most likely to be female (64.6%), are the oldest (47.5 years), have high incomes (11.5% > \$125k), have taken the second most day trips in the last 10 years (1.9) and are somewhat likely to have visited HC in the past (33.3%).
- Table 8 is a summary of the above segments.

TARGET MARKET RATINGS OF HC

- Exploratory factor analysis was also conducted on the performance ratings of the 20 items to determine groupings of attributes based on how good target markets felt they were. Each resultant factor represents a group of items that were rated extremely similarly by each independent respondent. The three resultant factors suggest **attributes that could be grouped together for marketing purposes**. The three factors and the performance items that each include were:
 - **Outdoor Experiences:** Hiking, camping, canoeing/rafting/kayaking, birding, fishing, climbing, wildlife watching, photography, mountain biking and agri-tourism.
 - Natures were most likely to believe HC was good at offering cultural attributes, while Like-it-Alls, Urbanites and Passives rated them moderately.
 - Dislikers rated this attribute the lowest.
 - **Cultural Experiences:** Shopping, festivals, dining/culinary, theater/concerts, museums, sightseeing, breweries/distilleries/wineries and arts and crafts.
 - Culturals rated this factor the highest, while Like-it-Alls and Passives rated them moderately.

- Natures rated these experiences as low while dislikers rated them the lowest.
- **Outdoor Hobbies:** Motorcycling and golfing.
 - Only Like-it-Alls rated these experiences positively.
 - All other potential markets rated these experiences negatively, suggesting that motorcycling and golfing should be promoted separately and only to their specific, niche markets.
- The clusters (target markets) were next examined to see how they rated the value of HC as a destination, and how likely they would be to visit HC in the future:
 - **Perceptions of Value:**
 - The mean score on a scale from 1 “extremely poor value” to 10 “extremely good value” was significantly higher for Like-it-Alls (mean = 7.42) than it was for Dislikers (mean = 5.07), Natures (mean = 6.78), Urbanites (mean = 6.82), and Passives (mean = 7.15).
 - **Likelihood of Visiting:**
 - The mean score on a scale from 1 “Definitely Will Not” to 5 “Definitely Will” for the probability they’ll visit HC in the next two years was significantly higher for Natures (mean = 3.81) and Like-it-Alls (mean = 3.75), than it was for Dislikers (mean = 2.57), Urbanites (mean = 2.88) and Passives (mean = 3.07).
 - Table 9 summarizes the target market evaluations.

RECOMMENDATIONS

- While HC has extremely appealing attributes and competitive advantage over neighboring counties, increasing the number of visitors will take an excellent strategic plan, based on a focused brand. The marketing of this brand will need to make target markets much more aware of HC’s offerings and entice visitors based on its best offerings. The challenge can be seen based on the current familiarity with and likelihood to travel to HC.
 - Currently two-thirds (67.3%) of all respondents stated that they were either “not at all familiar” (39.9%), “mostly unfamiliar” (13.6%) or “somewhat unfamiliar” (13.8%) of HC as a potential tourist destination.

- Also, potentially problematic that more than one quarter (25.6%) of respondents “definitely will not” take a vacation to HC in the next two years (1.2%), or that the probability is “low” (24.4%). An additional one third (28.0%) are unsure whether they would consider taking a vacation to HC. This group of “unsures” will be important for increasing visitation to HC.
- The most desirable attributes that respondents consider when they decide where to travel included: Sightseeing (3.85), dining/culinary (3.63), shopping (3.50), festivals (3.46), wildlife watching (3.38), live theater/concerts (3.23), museums (3.20), camping (3.12), photography (3.11), canoeing/rafting/kayaking (3.03) and arts and crafts (3.00).
 - These items suggest that for HC to best attract target markets to the region, they will need to be thought of as a place that offers scenic outdoor recreation and cultural offerings. These two areas should be the primary pillars of all marketing materials.
- The attributes respondents felt HC best delivered on their needs or expectations included: Sightseeing (3.92), wildlife watching (3.83), camping (3.77), photography (3.74), hiking (3.70), dining/culinary (3.64), fishing (3.63) and canoeing/rafting/kayaking (3.60). These attributes will likely take less effort to inform potential visitors about but should be included in marketing messages.
- Findings from the importance-performance analysis suggest the following:
 - Areas to keep up the good work included: Sightseeing, dining/culinary, wildlife watching, shopping, camping, photography and fishing (canoeing/rafting/kayaking was borderline);
 - This suggests that visitors find these areas to be important and that HC is doing well with them. Extra resources are likely not necessary to promote and maintain these attributes, though it needs to be known that these attributes are extremely important to the success of tourism to HC.
 - Areas to concentrate on included: live theater/concerts, museums and festivals (arts and crafts was borderline);
 - These experiences were found to be important to visitors, but they would like HC to be better at them. Resources should be used to promote these activities with the goal of increasing their quality and potential visitors’ perceptions of them.
 - Potential priorities included: hiking and canoeing/rafting/kayaking;

- While HC is perceived as doing well at these experiences, they weren't very important for potential visitors. This suggests that these areas could succeed if promoted, though the market for them will be somewhat smaller than for the attributes listed above.
- Lower priority with potential (niche activities) were: breweries/distilleries/wineries, agritourism, climbing, birding, mountain biking, golfing and motorcycling.
 - These are almost all niche activities. While most visitors stated they were not important nor were they performing well, these attributes are likely VERY important to those who vacation specifically for these purposes. Promotion of these attributes will require very focused target marketing and specific messages.
 - Hence, marketing campaigns based specifically on each of these individual attributes could be successful but must be targeted directly at the activity/niche users.
- The 20 desirable attributes (Importance) were reduced to four factors with an EFA, revealing attributes that respondents rated similarly important. The attributes in each factor reflect a collection of items that different groups of individuals would similarly like to do on a vacation. The items grouped in these factors suggest groupings of activities that visitors would like to do on one trip.

The four factors were:

 - CULTURAL EXPERIENCES: Festivals, dining/culinary, live theater/concerts, shopping, sightseeing, museums and breweries/distilleries/wineries;
 - NATURE ACTIVITIES: Camping, canoeing/rafting/kayaking, fishing and hiking;
 - PASSIVE OUTDOORS: Wildlife watching, photography, birding, arts/crafts and agritourism;
 - OUTDOOR SPORTS: Motorcycling, mountain biking, golfing and climbing.
- Factor analysis of the perceived performance of the same 20 attributes revealed three performance factors. Items in these factors are believed by respondents to be performing similarly by similar individuals. Future marketing messages should thus consider grouping these attributes together in promotion efforts.

- **Outdoor Experiences:** Hiking, camping, canoeing/rafting/kayaking, birding, fishing, climbing, wildlife watching, photography, mountain biking and agri-tourism.
- **Cultural Experiences:** Shopping, festivals, dining/culinary, theater/concerts, museums, sightseeing, breweries/distilleries/wineries and arts and crafts.
- **Outdoor Hobbies:** Motorcycling and golfing.
- Five markets were identified by cluster analyzing the three importance factors discussed above. While all of the identified markets have potential to be successful, it is believed that marketing to Like-it-Alls will have the most success. Natures, Culturals and Passives also look like viable markets, while Dislikers are likely the least viable market. Specific recommendations for each of the five target markets, listed in order of how viable they are believed to be are as follows:
 - **Like-it-Alls (n = 188): Really love everything outdoors**
 - This group likes all of the attributes HC has to offer and are much more likely to like outdoor sports than the other groups. Because of this they should be “Easy to Please.” They are also the largest segment, making up nearly one third of all potential visitors. They are also the youngest and have the highest incomes, are most likely to have already visited HC and really liked what they experienced. While messages about active outdoor pursuits will likely resonate the most with them, all marketing focused on the factors of desirability will be appealing to them. This market will not need extra resources spent on them to get them to visit as they know what HC offers, think it offers great value, and really like it. They are likely to be repeat visitors as long as HC doesn’t change too much.
 - **Natures (n = 102): This group loves playing in nature and likely hugs it**
 - This is a very attractive target market as HC’s natural bounty is what they desire the most. They are also the most likely segment to visit in the next two years (68.6%) and have taken the second most trips to HC in the past 10 years. Messages generated to attract this market should focus specifically on nature-based activities including hiking, camping, wildlife watching and being on the water. This segment isn’t a fan of urban activities, suggesting that these types of images should not be included.
 - **Passives (n = 96): This segment likes to view the outdoors, not play in it**
 - This segment is both the oldest (47.5 years) and most likely to be female (64.6%). They also have the second highest income and rate cultural

experiences moderately high. Based on their profile, this segment is likely more mature and less likely to take risks when traveling. Their preferred activities include wildlife watching, photography and birding. Images utilized to attract this market should include stunning images of nature, with wildlife in it. Marketing messages should also include information about the potential cultural experiences and more refined places to eat and stay.

- **Culturals (n = 102):** *Really like cultural experiences*
 - This group is mostly female (59.5%) and really like HC's attractions, food and shopping. They have moderate incomes and are much more likely to take day trips than overnight trips. Messages to attract this target market should likely promote groupings of activities to try to entice them to stay overnight. These messages should also promote girlfriend getaways that focus on the downtown experiences available in HC.
- **Dislikers (n = 73):** *Not a fan of HC's attributes except outdoor sports*
 - While this segment somewhat likes outdoor hobbies, they do not like the primary attributes HC offers. Their demographics are very average regarding age, income and gender. They are the least likely to have previously visited (especially day trips) and are the least likely to visit in the next two years. This group will be extremely difficult to attract, and marketing resources will most likely be better used to attract different visitors.
- Each of the five target markets were extremely similar in the mediums they are most likely to use when planning travel.
 - The three most likely mediums that all five of the target markets use were friends and family, online reviews and destination websites. This suggests the importance of word of mouth and that visitors' expectations will need to be exceeded when they visit the area. It also highlights the importance of investing in a quality website for promoting the tourism related activities to the area.
 - This also suggests that resources be used to continually scan online environments to help minimize the impacts of negative reviews and to seek ways to increase the visibility of positive reviews (i.e., hire an online concierge).
 - Google and TripAdvisor were also highly likely to be used by all groups when planning a vacation. This suggests the importance of investing in Google

AdWords and in search engine optimization (SEO). It further suggests that investment in an online concierge to monitor online reviews could greatly aid in increasing tourism to the region.

- Travel guides were also found to be a very important medium for all segments. This suggests that marketing efforts should still include access to both printed and online guides.
- While social/mobile media outlets were not as important as those listed above, they seem to be getting more important with each study that we do. Due to the low cost of these outlets, time and resources should be used to stay competitive in this space.
- In conclusion, the results suggest that HC could have competitive advantage over other destinations if it were to market the various activities that they offer, while highlighting Cultural, Nature and Refined experiences. They should focus marketing efforts at Like-it-Alls and should also pursue Natures, Passives and Culturals. They should do this by targeting these groups with the attributes each finds most important while concentrating marketing efforts on their website and social/mobile media outlets.
 - Thus, the results revealed that there are viable markets for HC to go after. Further, due to the large potential for growth in tourism to the region it is highly recommended that local governmental officials increase the budget for tourism promotion and invest in tourism related infrastructure and positions. These decisions should be strategically made based on the above suggestions and should be part of a larger plan for the city and region.

TABLES & FREQUENCIES

Table 1
Of the following travel party types, rate them
based on their desirability to you (Q5)

Party Type	Mean
Family with Adults	3.46
Couple/s	3.33
Pet Friendly	3.20
Family with Kids <18	3.04
Multi-generational Family	3.04
Solo/Individual	3.03
Girlfriends	3.00
Guy friends	2.69

*On a scale from 1 (Very Low) to 5 (Very High)

Table 2
If you were to plan a vacation, how important would each of the
following be in your planning process? (Q27)

Information Source	Mean
Friend or Family Member	3.91
Search for online reviews	3.67
Website of a specific destination	3.64
Travel Guide/Travel Book	3.62
Google	3.62
Trip Advisor	3.34
TV Show/TV News Story	3.12
Television Ads	3.10
YouTube Channel	3.09
Travel Agent	3.05
Facebook	3.00
Web Banner/Internet Ad	2.89
Radio Ad	2.81
An App	2.79
Instagram	2.79
e-mailed newsletters	2.79
Magazine Articles	2.75
Pinterest	2.72
e-mail blasts/ads	2.69
Newspaper Ads	2.65
Magazine Ads	2.65
TikTok	2.61
Twitter	2.56
Snapchat	2.52
Tumblr	2.27

*On a scale from 1 (Very Low) to 5 (Very High)

Table 3
Based on your most recent trip/s, how would you rank Haywood County
on these vacation types or activities (Q22) (VISITORS ONLY)?

Trip types	Mean
Wildlife watching	3.95
Sight Seeing	3.92
Photography	3.88
Camping	3.85
Hiking	3.79
Dining/Culinary	3.75
Fishing	3.75
Canoeing/Rafting/Kayaking	3.69
Shopping	3.65
Festivals	3.63
Climbing	3.57
Arts and Crafts	3.55
Mountain Biking	3.55
Birding	3.50
Museums	3.30
Breweries, Distilleries & Wineries	3.27
Motorcycling	3.26
Live Theater/Concerts	3.26
Agritourism	3.24
Golfing	3.13

*On a scale from 1 (Very Low) to 5 (Very High)

Table 4
Based on your most recent trips, how well do you think Haywood County
Delivered for these types of travel parties (VISITORS ONLY) (Q21)?

Party type	Mean
Family	2.25
Family with Adults	2.23
Couple/s	2.22
Multi-generational	2.18
Family with Kids <18	2.18
Pet Friendly	2.14
Girlfriends	2.13
Guy friends	2.09

* On a scale from 1 below expectations, 2 meets expectations, 3 exceeds expectations

Table 5
Of the following leisure trip experiences, rate them
based on their desirability to you (IMPORTANCE) (Q6)

Trip Types	Mean
Sight Seeing	3.85
Dining/Culinary	3.63
Shopping	3.50
Festivals	3.46
Wildlife watching	3.38
Live Theater/Concerts	3.23
Museums	3.20
Camping	3.12
Photography	3.11
Canoeing/Rafting/Kayaking	3.03
Arts and Crafts	3.00
Fishing	2.98
Breweries, Distilleries & Wineries	2.92
Hiking	2.90
Climbing	2.49
Agritourism	2.48
Birding	2.42
Mountain Biking	2.36
Golfing	2.27
Motorcycling	2.22

*On a scale from 1 (Very Low) to 5 (Very High)

Table 6

Of the following leisure trip experiences, rate them based on how well you think Haywood County would deliver on these vacation types or activities (Q28) (PERFORMANCE)?

Trip Experiences	Mean
Sight Seeing	3.92
Wildlife watching	3.83
Camping	3.77
Photography	3.74
Hiking	3.70
Dining/Culinary	3.64
Fishing	3.63
Canoeing/Rafting/Kayaking	3.60
Shopping	3.46
Climbing	3.44
Festivals	3.35
Birding	3.34
Mountain Biking	3.33
Arts and Crafts	3.29
Breweries, Distilleries & Wineries	3.20
Live Theater/Concerts	3.09
Museums	3.05
Agritourism	2.97
Golfing	2.80
Motorcycling	2.80

*On a scale from 1 (Very Low) to 5 (Very High)

Table 7
Final Clusters

	Like-it-Alls	Natures	Dislikers	Culturals	Passives
Culture Experiences	.14528	-.64585	-1.30455	.81811	.27733
Nature Activities	.21699	1.14625	-.80215	-.08942	-.91084
Passive Outdoors	.40799	.10348	-.75778	-.88589	.87616
Outdoor Sports	1.03409	-.81323	.29029	-.41401	-.81683

*Bold items were quite high while italicized items were somewhat high

*Negative items suggest a dislike of the factors

Table 8
Target Market Summary

Target Market	Female ¹ %	Age ¹ Years	Income 125k+	Day Trips ¹ Last 10 yrs	Overnight ¹ Last 10 yrs	Visited ¹ HC	Visits ¹ Next 2 yrs
Like-it-Alls	40.3%	38.9	12.4%	4.1	5.0	42.6%	5.5
Natures	50.0%	43.6	5.9%	2.8	4.7	34.3%	1.6
Dislikers	48.6%	46.1	7.1%	0.2	1.1	22.2%	0.7
Culturals	59.5%	46.6	9.2%	1.7	0.8	26.0%	1.2
Passives	64.6%	47.5	11.5%	1.9	1.3	33.3%	1.1

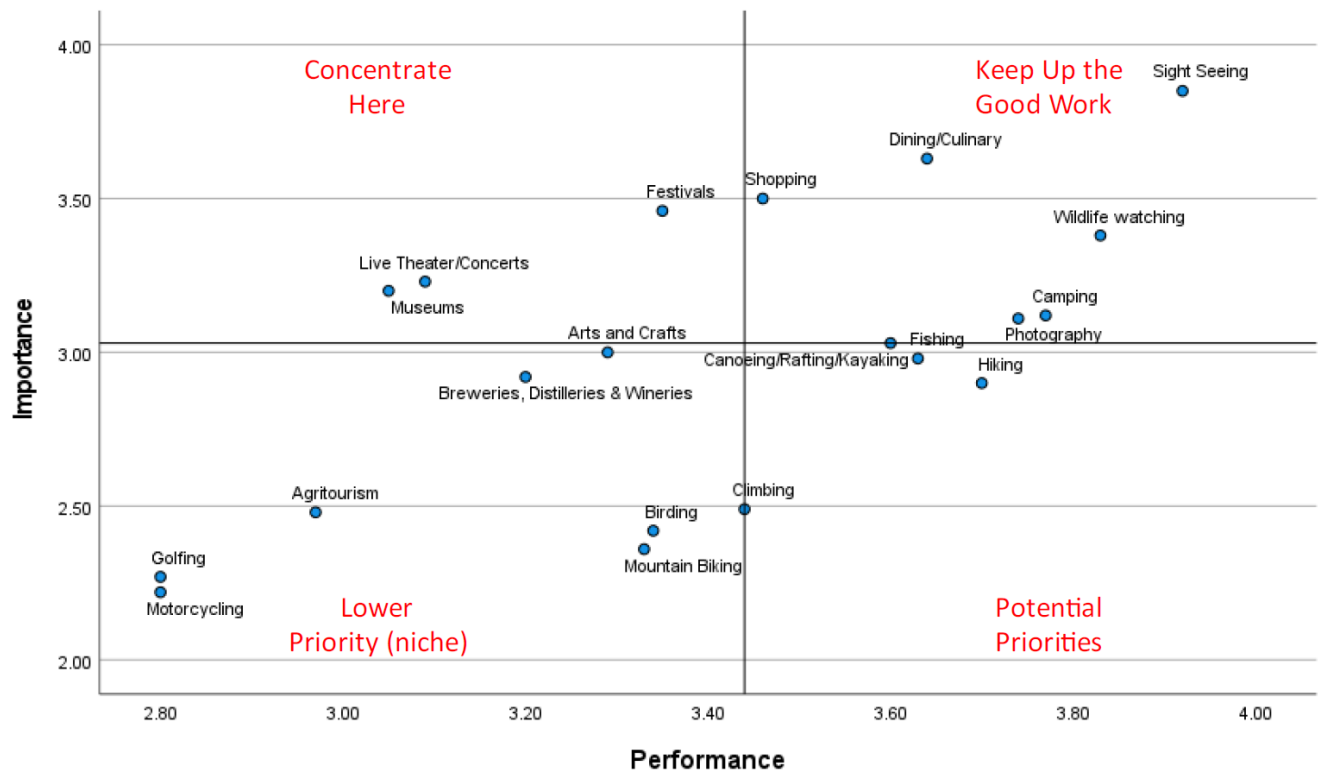
¹ Differences between markets are statistically significant

Table 9
Summary of Target Market Evaluations

Target Market	Outdoor Experiences	Cultural Experiences	Outdoor Hobbies	Value	Likelihood To visit¹
Like-it-Alls	Moderate	Moderate	Highest	Highest	High
Natures	Highest	Low	Low	Moderate	Highest
Dislikers	Lowest	Lowest	Low	Lowest	Lowest
Culturals	Moderate	Highest	Lowest	Moderate	Moderate
Passives	Moderate	Moderate	Low	Moderate	Moderate

¹ Measured on a scale from 1 “Not at all Likely” to 5 “Extremely Likely”

FIGURE 1
Importance/Performance
Grid



*Importance is among all prospects, Performance is among past visitors

APPENDIX A:
PANEL SURVEY

Haywood County Panel Study

1 How many days per year do you travel for pleasure?

Mean = 15.0

2 How many different vacations of 4 days or more do you take per year?

Mean = 2.9

3 Whom do you travel with most often?

13.2% Solo Traveler (1)

29.9% Significant Other (4)

7.4% Children (5)

22.3% Significant other and children (10)

16.4% Other Family (6)

7.1% Friends (7)

0.3% Coworkers(s) (8)

3.4% Other (please specify) (9)

- 4 When you think of a place to travel to or find lodging near the Great Smoky Mountains National Park in North Carolina, what towns or cities (name as many as you can) come to mind? Put “none” if you can’t think of any.

7.9% Recalled Unaided
92.1% Did Not Recall Unaided

- 5 Of the following travel party types, rate them based on their desirability to you:

	Very Low (1)	Low (2)	Medium (3)	High (4)	Very High (5)
Couple/s (1) Mean = 3.33	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family with Adults (2) Mean = 3.46	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family with Kids (9) Mean = 3.04	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Girlfriends (10) Mean = 3.00	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guy friends (11) Mean = 2.69	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Multi- generational Family (12) Mean = 3.04	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pet Friendly (13) Mean = 3.20	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Solo/Individual (14) Mean = 3.03	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6 Of the following leisure trip experiences, rate them based on their desirability to you:	Very Low (1)	Low (2)	Medium (3)	High (4)	Very High (5)
Agritourism (1)					
Mean = 2.48	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts and Crafts (34)					
Mean = 3.00	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Birding (35)					
Mean = 2.42	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Breweries, Distilleries & Wineries (36)					
Mean = 2.92	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Camping (37)					
Mean = 3.12	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Canoeing/Rafting/Kayaking (38)					
Mean = 3.03	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Climbing (39)					
Mean = 2.49	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dining/Culinary (40)					
Mean = 3.63	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Festivals (41)					
Mean = 3.46	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing (42)					
Mean = 2.98	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golfing (43)					
Mean = 2.07	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hiking (44)					
Mean = 2.90	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live Theater/Concerts (45)					
Mean = 3.23	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motorcycling (46)					
Mean = 2.22	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Mountain Biking (47) Mean = 2.36	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Museums (48) Mean = 3.20	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Photography (49) Mean = 3.11	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping (50) Mean = 3.50	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sight Seeing (51) Mean = 3.85	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wildlife watching (52) 3.38	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7 What additional factor or factors are important to you when choosing a place to vacation?
(Type 'None' if you can't think of any)

Haywood County, NC is located just east of the Great Smoky Mountains National Park, and west of Asheville, NC. County towns include Waynesville, Maggie Valley, Lake Junaluska, Canton and Clyde. Its location is outlined on the below map:

8 Have you ever heard of Haywood County, NC or any of the towns within the county?

47.1% Yes (1)

52.9% No (2)

9 How familiar are you with Haywood County, NC as a potential travel destination? (among all respondents, not just those who previously said they have heard of HC)

39.9% Not at all familiar (1)

13.6% Mostly unfamiliar (2)

13.8% Somewhat unfamiliar (3)

19.7% Somewhat familiar (4)

7.0% Mostly familiar (5)

6.1% Extremely familiar (6)

10 Have you ever visited the Great Smoky Mountains National Park?

56.4% Yes (1)

43.6% No (2)

11 Have you ever been to Haywood County, NC?

33.4% Yes (1)

66.6% No (2)

Skip To: 28 If the answer to #11 above = NO

11b When was your most recent trip there?

12 On your most recent trip to Haywood County, NC, which places did you visit? Check all that apply.

19.6% Blue Ridge Parkway (1)

5.6% Canton (2)

5.6% Clyde (3)

20.7% Great Smoky Mountains National Park (4)

5.6% Lake Junaluska (5)

16.5% Maggie Valley (6)

8.8% Waynesville (7)

1.0% None of the above (8)

13 On your most recent visit to Haywood County, did you stay overnight in the county?

64.0% Yes (1)

36.0% No (2)

Skip To: 16 If the answer to #13 above = NO

14 When you have visited Haywood County, NC in the past, in which towns did you stay in paid lodging (check all that apply)

- 6.2% Waynesville (1)
- 12.6% Maggie Valley (2)
- 4.6% Canton (3)
- 3.2% Clyde (4)
- 3.7% Lake Junaluska (5)
- 1.5% Other (6) _____
- 1.0% No Paid Lodging (7)

15 Approximately how many overnight trips have you taken to Haywood County? If you took none in a category put "0".

- | | |
|----------------------------|-------------|
| 14 In the past 2 years (1) | Mean = 1.56 |
| 15 Between 2-5 years (2) | Mean = 2.06 |
| 16 Between 6-10 years (3) | Mean = 3.52 |
| 17 11 or more years (4) | Mean = 4.85 |

16 Have you taken any daytrips to Haywood County?

- 58.4% Yes (1)
- 41.6% No (2)

Skip To: 19 If Have the answer to #16 above = NO

17 Approximately how many day trips (with no overnight stay) have you taken to Haywood County? If you took none in a category put "0".

- | | |
|----------------------------|-------------|
| 17 In the past 2 years (1) | Mean = 2.1 |
| 18 Between 2-5 years (2) | Mean = 5.5 |
| 19 Between 6-10 years (3) | Mean = 6.9 |
| 20 11 or more years (4) | Mean = 12.1 |

18 When the primary destinations for your trips have been to other regional towns like Asheville, Cherokee, Gatlinburg, Pigeon Forge or Sevierville, and you took any daytrips to Haywood County (Waynesville, Maggie Valley, Canton, Clyde, Lake Junaluska), how many daytrips have you taken? If you took none in a category put "0".

21 In the past 2 years (1)	Mean = 2.1
22 Between 2-5 years (2)	Mean = 2.9
23 Between 6-10 years (3)	Mean = 3.9
24 11 or more years (4)	Mean = 6.0

19 Approximately how much money did your travel party spend on your most recent trip to Haywood County, NC for each of the following (exclusive of airfare)? If you spent nothing in a category put "0".

25 Lodging (1)	Mean = \$285.92
26 Food (5)	Mean = \$232.02
27 Entertainment (6)	Mean = \$194.03
28 Shopping (7)	Mean = \$294.7
29 Other (8)	Mean = \$127.07

20 How many adults (including yourself) were in your travel party on your most recent visit to Haywood County?

Mean = 3.04

21 Based on your most recent trips, how well do you think Haywood County delivered for these types of travel parties?

	Below Expectations (1)	Meets Expectations (2)	Exceeds Expectations (3)
Couple/s (10) Mean = 2.22	30	31	32
Family with Adults (13) Mean = 2.23	33	34	35
Family with Kids (14) Mean = 2.18	36	37	38
Girlfriends (15) Mean = 2.13	39	40	41
Guy friends (16) Mean = 2.09	42	43	44
Multi-generational (17) Mean = 2.18	45	46	47
Family (18) Mean = 2.25	48	49	50
Pet Friendly (19) Mean = 2.14	51	52	53

22 Based on your most recent trip/s, how would you rank Haywood County on these vacation types or activities?	Very Low (1)	Low (2)	Medium (3)	High (4)	Very High (5)
Agritourism (1) Mean = 3.24	54	55	56	57	58
Arts and Crafts (4) Mean = 3.55	59	60	61	62	63
Birding (5) Mean = 3.50	64	65	66	67	68
Breweries, Distilleries & Wineries (6) Mean = 3.27	69	70	71	72	73
Camping (7) Mean = 3.85	74	75	76	77	78
Canoeing/Rafting/Kayaking (8) Mean = 3.69	79	80	81	82	83
Climbing (9) Mean = 3.57	84	85	86	87	88
Dining/Culinary (10) Mean = 3.75	89	90	91	92	93
Festivals (11) Mean = 3.63	94	95	96	97	98
Fishing (12) Mean = 3.75	99	100	101	102	103
Golfing (13) Mean = 3.13	104	105	106	107	108
Hiking (14) Mean = 3.79	109	110	111	112	113
Live Theater/Concerts (15) Mean = 3.26	114	115	116	117	118
Motorcycling (16) Mean = 3.26	119	120	121	122	123

Mountain Biking (17) Mean = 3.55	124	125	126	127	128
Museums (18) Mean = 3.30	129	130	131	132	133
Photography (19) Mean = 3.88	134	135	136	137	138
Shopping (20) Mean = 3.65	139	140	141	142	143
Sight Seeing (21) Mean = 3.92	144	145	146	147	148
Wildlife watching (22) Mean = 3.95	149	150	151	152	153

23 How far did you travel to reach your destination in Haywood County?

- 19.3% less than 100 miles (1)
- 44.2% 100 to 250 miles (2)
- 22.3% 251 to 500 miles (3)
- 10.7% 501 to 1000 miles (4)
- 3.6% more than 1,000 miles (5)

24 Where did you stay while in Haywood County?

- 9.6% Private Home (1)
- 11.7% Camping/RV (2)
- 41.1% Hotel/Motel (3)
- 9.1% Bed & Breakfast (4)
- 10.7% Rental Home (e.g., Airbnb, VRBO) (5)
- 17.8% Other: (6) _____

25 What was the primary purpose of your trip to Haywood County?

- 3.0% Business (1)
- 17.3% To visit friends/family (4)
- 15.0% General vacation (5)
- 3.6% Special event (6)
- 24.4% Getaway weekend (7)

2.2% Other: (8) _____

26 Which of the following best describes how positively or negatively you will talk to others about Haywood County as a leisure travel destination? Mean = 1.89

44.2% Extremely Positively (1)

33.0% Mostly Positively (2)

14.2% Somewhat Positively (3)

8.1% Neutral (4)

0.0% Somewhat Negatively (5)

0.0% Mostly Negatively (6)

0.5% Extremely Negatively (7)

27 If you were to plan a vacation, how important would each of the following be in your planning process?	Not at all important (1)	(2)	(3)	(4)	Very important (5)
Magazine Ads (1)					
Mean =2.65	26	27	28	29	30
Magazine Articles (4)					
Mean = 2.75	31	32	33	34	35
Facebook (5)					
Mean = 3.00	36	37	38	39	40
Newspaper Ads (6)					
Mean = 2.65	41	42	43	44	45
Television Ads (7)					
Mean = 3.10	46	47	48	49	50
Twitter (8)					
Mean = 2.56	51	52	53	54	55
TikTok (9)					
Mean = 2.61	56	57	58	59	60
TV Show/TV News Story (10)					
Mean = 3.12	61	62	63	64	65
Radio Ad (11)					
Mean = 2.81	66	67	68	69	70
Pinterest (12)					
	71	72	73	74	75
YouTube Channel (13)					
Mean = 3.09	76	77	78	79	80

Travel Guide/Travel Book (14) Mean = 3.62	81	82	83	84	85
Web Banner/Internet Ad (15) Mean = 2.89	86	87	88	89	90
Tumblr (16) Mean = 2.27	91	92	93	94	95
Trip Advisor (17) Mean = 3.34	96	97	98	99	100
Friend or Family Member (18) Mean = 3.91	101	102	103	104	105
Instagram (19) Mean = 2.79	106	107	108	109	110
An App (20) Mean = 2.79	111	112	113	114	115
Snapchat (21) Mean = 2.52	116	117	118	119	120
Google (22) Mean = 3.62	121	122	123	124	125
Travel Agent (23) Mean = 3.05	126	127	128	129	130
Website of a specific destination (24) Mean = 3.64	131	132	133	134	135
Search for online reviews (25) Mean = 3.67	136	137	138	139	140
e-mailed newsletters (26) Mean = 2.79	141	142	143	144	145

e-mail blasts/ads (27) Mean = 2.69	146	147	148	149	150
28 Of the following leisure trip experiences, rate them based on how well you think Haywood County would deliver on these vacation types or activities?					
	Very Low (1)	Low (2)	Medium (3)	High (5)	Very High (5)
Agritourism (1) Mean = 2.97	151	152	153	154	155
Arts and Crafts (4) Mean = 3.29	156	157	158	159	160
Birding (5) Mean = 3.34	161	162	163	164	165
Breweries, Distilleries & Wineries (6) Mean = 3.20	166	167	168	169	170
Camping (7) Mean = 3.77	171	172	173	174	175
Canoeing/Rafting/Kayaking (8) Mean = 3.60	176	177	178	179	180
Climbing (9) Mean = 3.44	181	182	183	184	185
Dining/Culinary (10) Mean = 3.64	186	187	188	189	190
Festivals (11) Mean = 3.35	191	192	193	194	195
Fishing (12) Mean = 3.63	196	197	198	199	200
Golfing (13) Mean = 2.80	201	202	203	204	205

Hiking (14) Mean = 3.70	206	207	208	209	210
Live Theater/Concerts (15) Mean = 3.09	211	212	213	214	215
Motorcycling (16) Mean = 2.80	216	217	218	219	220
Mountain Biking (17) Mean = 3.33	221	222	223	224	225
Museums (18) Mean = 3.05	226	227	228	229	230
Photography (19) Mean = 3.74	231	232	233	234	235
Shopping (20) Mean = 3.46	236	237	238	239	240
Sight Seeing (21) Mean = 3.92	241	242	243	244	245
Wildlife watching (22) Mean = 3.83	246	247	248	249	250

29 Within the next two years, the probability that you will take a vacation to Haywood County, NC is: Mean = 3.37

- 1.2% Definitely will not (0% chance) (1)
- 24.4% Low Probability (2)
- 28.0% Unsure Probability (approximately 50% chance) (3)
- 29.3% High Probability (4)
- 17.1% Definitely Will (100% chance) (5)

30 Approximately how many trips to Haywood County, NC do you think you will make in the next two years?

Mean = 2.56 (Visitors = 5.72, Non Visitors = .99)

31 How would you rate the value you would receive for the money you think you would pay for a vacation to Haywood County, NC? Mean = 6.85 (Visitors = 7.85, Non Visitors 6.35)

4.1% Extremely poor value (1)
3.1% (2)
4.4% (3)
7.4% (4)
11.1% (5)
9.4% (6)
13.0% (7)
17.4% (8)
9.9% (9)
19.8% Extremely good value (10)

32 In what year were you born?

Mean = 1978 Average age = 43.7 years

33 Where is your permanent residence? (53)

	N	%
Tennessee	122	20.6%
Florida	108	18.2%
North Carolina	98	16.5%
Georgia	97	16.4%
South Carolina	87	14.7%
New York	39	6.6%
New Jersey	11	1.9%
Kentucky	8	1.3%
California	4	0.7%

Connecticut	3	0.5%
Colorado	2	0.3%

Q33B Which of the following areas do you live closest to

	N	%
Charlotte, NC	72	12.1%
Atlanta, GA	60	10.1%
New York, NY	57	9.6%
Knoxville, TN	55	9.3%
Orlando-Daytona Beach-Melbourne, FL	53	8.9%
Chattanooga, TN	50	8.4%
Tampa-St. Petersburg (Sarasota), FL	50	8.4%
Nashville, TN	49	8.3%
Augusta, GA	47	7.9%
Greensboro-High Point-Winston Salem, NC	47	7.9%
Anderson-Greenville-Spartanburg SC-Asheville NC	45	7.6%
Missing System	8	1.3%
Total	593	100.0%

34 Are you:

48.4% Male (1)

51.3% Female (2)

0.3% Other (3)

35 What was your approximate total household income last year?

Median = \$45,000-\$54,999

36 What is your US Zip Code?

37 If you have any comments regarding Haywood County, NC as a travel destination feel free to write them here: