

2008 Smoky Mountain Host/Cherokee Travel Study Summary Presentation Spring 2009



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- **The Blue Ridge National Heritage Area (BRNHA), Smoky Mountain Host, Eastern Band of Cherokee Indians, Cherokee Chamber of Commerce, Western Carolina University, and the Cherokee Preservation Foundation have partnered to support research efforts aimed at increasing the effectiveness of tourism marketing efforts in the region, including the sharing of leads/database resources.**
 - Prior research has been conducted to measure visitation and economic impact. Intercept visitor surveys in welcome centers and select attractions have also taken place over the past two years.
 - MWI conducted qualitative and quantitative research for Smoky Mountain Host in 2001 to understand awareness, perceptions, information used, and reactions to marketing materials, of both visitors and non-visitors to the area.
 - MWI was commissioned in 2007 to conduct multi-phase qualitative and quantitative research with the goal of building a framework for tracking visitation measures, motivators, and satisfaction for Cherokee and the Seven-County Smoky Mountain Host region* over time.
 - Focus groups with a mix of past-visitors and non-visitors were completed in November 2007.

*North Carolina counties: Clay, Cherokee, Graham, Haywood, Jackson, Macon, and Swain – including the Qualla Boundary.

2007 Focus Group Conclusions and Recommendations

Increasing Knowledge and Interest among Potential Visitors

- **BRNHA and Smoky Mountain Host's first challenge appears to be a general lack of awareness about the region among its target audience – exactly where the region is located, what it is called, why someone would want to vacation there (relative to other drivable vacation destinations), the available relaxation opportunities and activities/attractions (especially for those with children), and the available accommodations, food, and entertainment.**
 - **Without addressing this lack of awareness, most potential vacationers have no way or reason to learn about the region - unless they happen to hear about it through word of mouth – and therefore no reason to investigate it further or to plan a visit.**

***MWI recommended* that BRNHA and Smoky Mountain Host consider planning and implementing an awareness campaign that targets each audience of vacationer - e.g., those seeking an active versus a relaxing vacation, single/married/groups (such as reunions and trade organizations), those with no kids/younger children/older children/grandchildren. Potential visitors desire photographs of the beautiful vistas, information about the breadth of available activities and details on how to plan them, geographically-based sample itineraries (1 to 7 days), and reassurances that good hotels and restaurants are available. Since most potential visitors first think about enjoying outdoor activities in the region, providing detailed information on how to plan these appears critical, as well as emphasizing how relaxing a vacation in the mountains can be.**

2007 Focus Group Conclusions and Recommendations (Cont'd.)

Increasing Awareness among Potential Visitors

- Suggestions about the best ways to reach travelers with news about the Smoky Mountain Host region include:
 - Billboards
 - Articles in the travel section of the newspaper
 - Radio Ads
 - Direct Mail (that does not appear as though it advertises timeshares or land sales)
 - Local events/festivals
 - A simpler web site URL
 - Listings of possible road trips on the web site, segmented by audience (e.g., traveling with younger children/older children/no children; active versus relaxing vacations; 3/5/7 day trips)
 - Posting objective reviews from other visitors on the web site
 - Increasing awareness about bus service to/from the Cherokee casino

MWI recommended that BRNHA and Smoky Mountain Host consider evaluating and adjusting its current marketing mix and overarching strategies for visitor communications/messaging - primarily for its web site presence, for driving traffic to the site, and for search engine optimization. Additional targeted outreach – through interstate billboards, newspaper/magazine articles, Clark Howard [in Atlanta] radio ads, and a relationship with AAA – also appears advisable.

- **For the quantitative research reported here, interviews were conducted among three target groups in November 2008:**
 - 600 online interviews with adults who inquired about the area within the past four years ("Inquirers"), using a client-provided database.
 - 600 interviews with residents in a 300-mile radius outside western North Carolina ("Random Regional Travelers"), using a national consumer online panel; these respondents were screened to be:
 - Ages 21 or older
 - Sole or shared responsibility in the travel decisions
 - Has traveled for pleasure or vacation in the past 12 months 50/100 miles from home
 - An additional 50 telephone interviews were conducted with area Cherokee, NC Chamber members screened to ensure their company has dealt directly with tourists
 - This study is a 'snapshot in time' (November 2008). Findings will become more important over time as subsequent tracking research shows the impact of future marketing programs.

Methodology (Cont'd)

- Random regional travelers and inquirers were shown the map below in order to establish which area was referenced in the survey and to reinforce the terminology used (North Carolina Smoky Mountains (West of Asheville)).



The background of the slide is a light gray wireframe architectural drawing of a building's interior, showing various rooms, corridors, and structural elements. A solid dark blue horizontal band is positioned across the middle of the slide, containing the main title.

I. Travel and the Current Economic Environment

Current Economy's Effect on Travel Plans

(among random regional travelers and inquirers)

- Most travelers say that the current economy will have a negative impact on their travel plans. One-quarter are not sure.

	(Base)	Regional Travelers (600) %	Inquirers (600) %
<u>Current Economy Will Affect Plans</u>		62	57
Will reduce number of trips		49	44
Will reduce distance you travel		37	38
Will change method of transportation		8	7
Current Economy will have no negative impact		15	18
Don't know		23	25

- And when asked, about one-third say their current financial situation won't be as good in 2009 as in 2008.

	Regional Travelers (600) %	Inquirers (600) %
<u>Checklist</u>		
Going to be better in 2009 than in 2008	23	15
Going to be about the same	35	40
Not going to be as good in 2009 as in 2008	30	31
Don't know	12	14

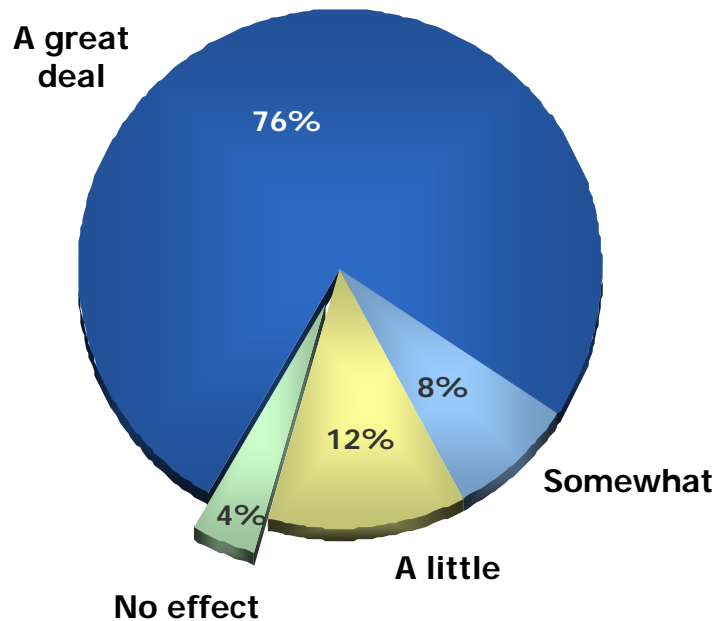
Q.16a/Q.17a: During 2009, to what extent, if any, do you think the state of the economy will impact your travel plans?

Current Economy's Effect on Tourism

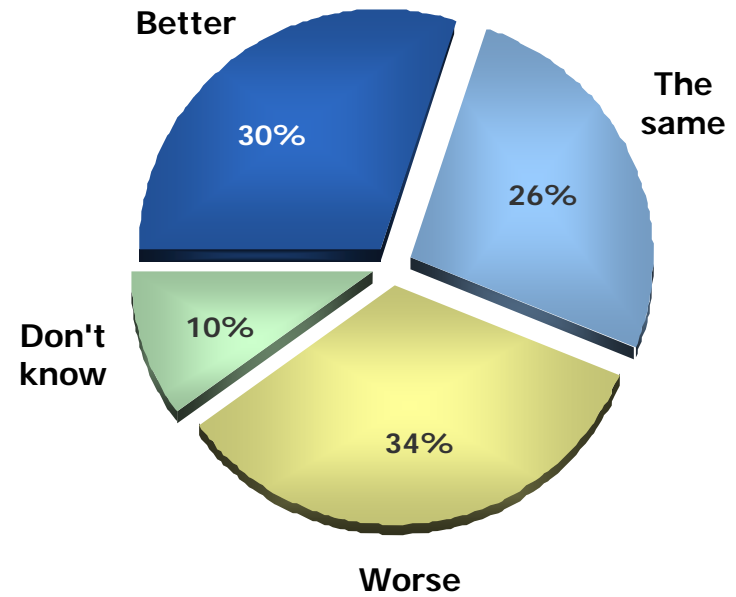
(among chamber members)

- Three-quarters of area businesses that deal with tourists say that the economy has had a great deal of impact on tourism to the area. Only 4% say that it has had no effect.
- Businesses are split in terms of forecasting how tourism will be in 2009: one-third each feel that it will be better, the same, or worse than in 2008.

Current Economy's Effect on Tourism in 2008



2009 Tourism Compared to 2008



Q.12a: In your opinion, how has the state of the economy impacted tourism in your area this year?
Q.12b: What do you think will be the impact of the economy on tourism to your area in 2009?

The background of the slide is a light gray architectural line drawing. It features a complex network of lines representing structural elements, including beams, columns, and curved surfaces, creating a technical and modern aesthetic.

II. Planning a Trip to the Smoky Mountain Area

Source of Information Used to Plan Visit

Among random regional travelers who have ever visited, the Internet, friends/relatives, and visitor guides are used most often. Inquirers, who were directed to inquire via the Internet, visitors' guides, or magazines, are more likely than random regional travelers to have used these three sources.

Internet

Friends/relatives

Net Travel/Visitor Guides

Visitor guides from the region or chamber of commerce

AAA or other travel club

Travel books/guides purchased in a store

Any travel guides ordered from a toll-free number

Other guide books

Net Media Advertising

Net Print Advertising

Travel section of newspaper

Magazine articles

Magazine advertising

Newspaper advertising

	Ever Visited		Chamber Members re: Visitors
	Regional Travelers	Inquirers	
(Base)	(445)	(540)	(50)
	%	%	%
	40	→ 68	58
	38	37	42
	<u>32</u>	<u>61</u>	<u>18</u>
Visitor guides from the region or chamber of commerce	19	45	12
AAA or other travel club	15	28	2
Travel books/guides purchased in a store	5	15	4
Any travel guides ordered from a toll-free number	4	11	-
Other guide books	3	4	-
	<u>10</u>	<u>31</u>	<u>18</u>
	<u>9</u>	<u>30</u>	<u>16</u>
Travel section of newspaper	5	8	2
Magazine articles	5	22	10
Magazine advertising	2	8	10
Newspaper advertising	2	3	2

(Miscellaneous comments not shown.)

Q.8/Q.9: What sources of information did you use to plan your most recent trip to the North Carolina Smoky Mountains (West of Asheville)?

Q.11: How do your visitors typically learn about the North Carolina Smoky Mountains, West of Asheville?

Length of Time Trip Was Planned Before Visit

- The trip planning cycle is much shorter than it used to be. Many travelers don't have time to wait and receive material in the mail.

	Regional Travelers	Inquirers
(Base)	(445)	(540)
	<u>%</u>	<u>%</u>
Less than 2 weeks in advance	22	← 17
2 to 4 weeks in advance	16	19
1 to 3 months in advance	22	→ 38
4 to 6 months in advance	12	14
7 to 12 months in advance	5	4
Over 1 year in advance	3	3
Don't know	<u>20</u>	<u>5</u>
	100	100

Reasons Visitors Chose the North Carolina Smoky Mountains as a Travel Destination

The scenery and attractions are mentioned most often as reasons for having chosen the area to visit, with inquirers more likely to mention each of these reasons.

Random regional travelers are more likely than inquirers to say they were on their way to another destination or there was no particular reason for traveling to WNC.

<u>Unaided Reasons for Choosing WNC</u>	(Base)	Regional Travelers (445)	Inquirers (540)
		%	%
<u>Net Scenic/Scenery</u>		<u>21</u>	→ <u>45</u>
Enjoy the beautiful scenery/view/to sight see	11		→ 26
To view/enjoy the mountains	8		→ 14
Foliage/leaves changing colors	3		→ 6
Like/love the Smoky Mountains	-		→ 6
Climate	-		→ 3
<u>Net Entertainment/Attractions</u>		<u>20</u>	→ <u>31</u>
Like/love the area	7		10
To enjoy miscellaneous outdoor activities	5		6
Named miscellaneous specific attraction	4		5
To gamble/visit Harrah's Casino	2		4
Enjoy the attractions/attend concert	2		5
Good shopping/dining	1		3
Lots of things to see/do	-		3
On the way to another travel destination		<u>17</u>	9
To visit family/friends/good family vacation	11		14
Close to home/convenient/quick	9		11
To try a new/different experience	5		5

(Miscellaneous comments not shown.)

Q.4/Q.5: Why did you choose to travel to the North Carolina Smoky Mountains (West of Asheville) on that last trip instead of someplace else?

The background of the slide is a light gray architectural wireframe or technical drawing. It features a complex network of lines representing structural elements, including beams, columns, and curved surfaces, creating a sense of depth and technical precision. The lines are thin and light, allowing the dark blue text box to stand out prominently.

III. Smoky Mountain Area Awareness, Visitation & Imagery

Unaided Southeastern Vacation Destinations Considering in the Next Year

(among 600 random regional travelers)

- On an unaided basis, one in ten random regional travelers (9%) say that they are considering the WNC area as a vacation destination in the next year (including Asheville). Most of future consideration comes from former visitors.

	<u>%</u>		<u>%</u>
<u>Net Florida</u>	35	<u>Net North Carolina</u>	23
Orlando	12	<u>Net Smoky Mountain Region</u>	9
Miami	3	Asheville	6
Tampa	3	Smoky Mountains (west of Asheville)	3
Panama City	3	Cherokee	1
Miscellaneous Florida mentions	15	Charlotte	4
<u>Net Georgia</u>	29	Miscellaneous North Carolina mentions	8
Atlanta	16	Virginia	9
Savannah	11	Alabama	4
Miscellaneous Georgia mentions	4	Kentucky	4
<u>Net South Carolina</u>	28	Louisiana	3
Myrtle Beach	14	Washington, D.C.	3
Charleston	11	None/don't know	7
Hilton Head	3		
Miscellaneous South Carolina mentions	5		
<u>Net Tennessee</u>	23		
Nashville	9		
Gatlinburg	8		
Pigeon Forge	4		
Memphis	3		
Chattanooga	3		
Miscellaneous Tennessee mentions	3		

2% of those who have never been to WNC before mention the area as a consideration (unaided) compared with 12% of those who have visited before.

(Miscellaneous destinations not shown.)

Q.1: When you think of taking a pleasure trip or vacation in the Southeast, say 100 to 300 miles from your residence, which cities or areas come to mind that you might consider if you were planning a trip in the next year, or so? Any others?

Southeastern Vacation Travel Destinations Visited in the Past Year

(among 600 random regional travelers)

- The Smoky Mountain Host region has strong competition for visitation, compared to other destinations.

	<u>Regional Travelers</u> %
<u>Total North Carolina</u>	<u>40</u>
Smoky Mountains (west of Asheville)	15
Asheville	13
Cherokee	11
Outer Banks	8
Other North Carolina	19
<u>Total Tennessee</u>	<u>39</u>
Smoky Mountains/Gatlinburg/Pigeon Forge	25
Chattanooga	13
Nashville	NA
Other Tennessee	14
<u>Total Florida</u>	<u>34</u>
Orlando area	15
Panhandle	9
South (Miami/Ft. Lauderdale/Keys)	9
North Atlantic Coast	4
Other Florida	10
<u>Total Georgia</u>	<u>29</u>
North Georgia Mountains	14
Coastal Georgia	9
Atlanta	NA
Other Georgia	14
<u>Total Mississippi</u>	<u>8</u>
<u>Total South Carolina</u>	<u>28</u>

Recency of Trip to the North Carolina Smoky Mountains

(among random regional travelers)

- Three-quarters of random regional travelers have been to the area before.
- About one-fifth have visited the area in the past year, but for 25%, visitation has not been within the last five years.

Caucasians, those with higher incomes, ages 55+, and those without kids in the household are more likely than their counterparts to have ever visited the area.

	(Base)	Regional Travelers (600)	
			<u>%</u>
<u>Have ever visited the area</u>		<u>74</u>	
Within the last year		18	
1-2 years ago		9	
2-3 years ago		9	
3-4 years ago		6	
5-9 years ago		13	} 25
10+ years ago		12	
Have visited but don't recall when		7	
Never		<u>26</u>	
		100	

* Less than 0.5%.

Q.3/Q.4: When was the last time, if at all, you traveled to any part of the North Carolina Smoky Mountains (West of Asheville) as shown on this map?

Key Measures By Age

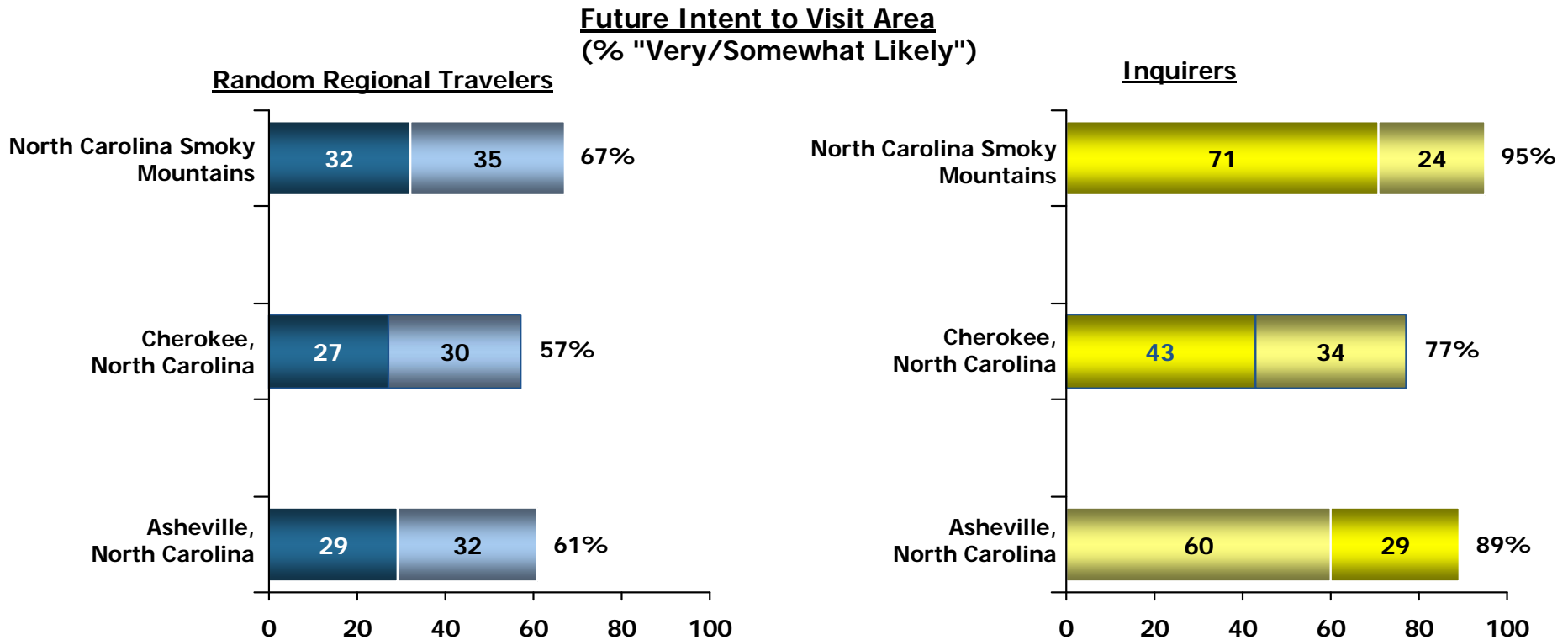
(among random regional travelers)

- Efforts need to be made to increase awareness and visitation among younger households.

	Total (600)	Age		
		21-44 (223)	45-54 (118)	55+ (259)
		<u>A</u> %	<u>B</u> %	<u>C</u> %
Ever visited WNC (west of Asheville)	74	65	→ 73	→ 83
Ever visited Cherokee	56	48	→ 54	→ 62
Aware of Cherokee	82	72	→ 85	→ 88

Future Visitation of the Region

- Nearly all inquirers (95%) are prime prospects to consider a future trip to the North Carolina Smoky Mountains area, and three quarters say they would consider a trip to Cherokee. This compares to two-thirds and 57% respectively among random regional travelers. Consideration of Asheville is similar to that of the WNC area overall.



- Travelers who have been to the area before are more likely to say they will consider a visit than those who have not been before suggesting high satisfaction with past visits.

Ways to Increase Visitation to the Region

- In order to visit/more often, random travelers and inquirers would be most motivated by knowing more about what there is to see and do in the area, package deals, an area discount pass, and/or seeing example itineraries.
- Chamber members most often say that visitation could be increased through economic improvement, more advertising, more attractions and more activities. They cite both adult and family activities, as well as more winter activities.
- When asked about the most important features to offer in the area, chamber members rate the following highest: sample itineraries, more advertising about what there is to see and do, more activities for kids, and advertised package deals.
- Chamber members also say that emphasizing scenic beauty (80%) and outdoor recreation opportunities (26%) are most important in marketing and advertising the region.

Ways to Increase Visitation to Area

(among chamber members)

	(Base)	<u>Chamber Members</u> (50) %
<u>Unaided Comments</u>		
<u>Net Economy Improvement</u>		<u>30</u>
Improve the economy		14
Gas prices		10
Need employment opportunities		4
Improve home prices		2
More advertisements		18
More attractions		14
<u>Net More Activities</u>		<u>12</u>
More activities for adults/nightlife		4
More winter activities		4
More activities for families		2
More activities for kids		2
Improve package deals/more comprehensive		6
More shopping		2
Get rid of tourism taxes		2
Modernize attractions		2
Protect ridge tops		2

Motivations For Future Visits/To Visit More Often

<u>List</u>	(Base)	Regional	Inquirers
		Travelers	
		(600)	(600)
		%	%
Knowing more about what there is to see/do		45	44
Package deals		37	→ 43
A regional discount pass to attractions or area businesses (such as restaurants)		33	→ 41
Seeing example itineraries to better understand what there is to see/do		28	→ 34
More festivals/events		17	→ 25
Better dining/more dining		16	→ 26
Improved traffic getting <u>to</u> the area		15	→ 22
More cultural and heritage activities		15	17
Better shopping/more shopping		13	14
Better roads in the area		13	15
Better accommodations in the area		12	→ 19
More theme parks or other attractions		11	10
More nighttime activity options		10	10
More activities for kids		10	12
Improved theme parks or other attractions		9	10
Improved outdoor activities		8	13

(Miscellaneous comments not shown.) (Multiple responses allowed.)
 Q. 16/Q. 17: What would motivate you to visit the North Carolina Smoky Mountains (West of Asheville) more often?

The background of the slide is a light gray architectural wireframe or technical drawing, showing various geometric shapes, lines, and curves, possibly representing a building or mechanical structure. It is centered on a dark blue background.

IV. Opinions of the Smoky Mountain Area

Unaided Impressions of the Smoky Mountains Region

(among random regional travelers)

- The "scenery" or specific "activities/attractions" come to mind first about the WNC area as well as Asheville. For Cherokee, "activities/attractions" are more prominent and in particular, the "Indian Reservation" and "casino."

In other words, travelers can enjoy a good mix of activities throughout the area. Something for everyone.

<u>Key Unaided Impressions</u>	The NC Smoky Mountains	Cherokee, NC	Asheville, NC
	%	%	%
<u>Net Scenic/Scenery</u>	<u>46</u>	<u>16</u>	<u>20</u>
Mountains	21	11	13
Beautiful/beautiful scenery	18	4	4
Fall leaves/foliage/trees/orchard	5	*	1
<u>Net Entertainment/Attractions</u>	<u>28</u>	<u>51</u>	<u>43</u>
Outdoor activities	14	3	3
<u>Net Specific Attractions</u>	<u>11</u>	<u>45</u>	<u>32</u>
Blue Ridge Parkway	4	*	1
Cherokee	2	2	-
Biltmore Estate	2	-	30
Native Americans/Indian reservation	1	23	*
Harrah's Casino/gambling	*	22	*

* Less than 0.5%.

(Miscellaneous comments not shown.)

Q.2: In thinking about each of the following areas as a leisure or vacation destination, what comes to mind?

Area Perceptions

(top 2 box excellent/good)

- Target regional travelers rate the area high, with 85% giving a positive overall rating, and a minimum of two-thirds rating nearly all attributes positively. The area is rated highest for scenery, a pleasant place to relax and unwind, and hiking, and lowest for nightlife, cell phone reception, and theme parks.

	Regional Travelers
(Base)	(600)*
	%
Overall	85
Scenic beauty/drives	94
Pleasant place to relax and unwind	88
Hiking trails	87
Has friendly people	85
Good for family vacations	84
Sites with natural or ecological emphasis	84
General outdoor activities	82
Camping/campgrounds	81
Shopping for local crafts & art	80
Variety of things to see and do	79
Quality accommodations & lodging	79
Fishing	79
A place that you feel safe & secure	78
Interesting places to shop	78
Whitewater recreation (rafting, kayaking, canoeing)	77
Motorcycle drives	76
Unique attractions & experiences	75
Cultural events & festivals	74
Good roadways/highways	73
Quality restaurants & dining	71
Fun things for kids to do	71
Good value for the money	70
Museums with historical or cultural emphasis	66
Golf	58
Gambling/casino	57
Theme parks	54
Internet/cell phone reception	49
An exciting night life	42

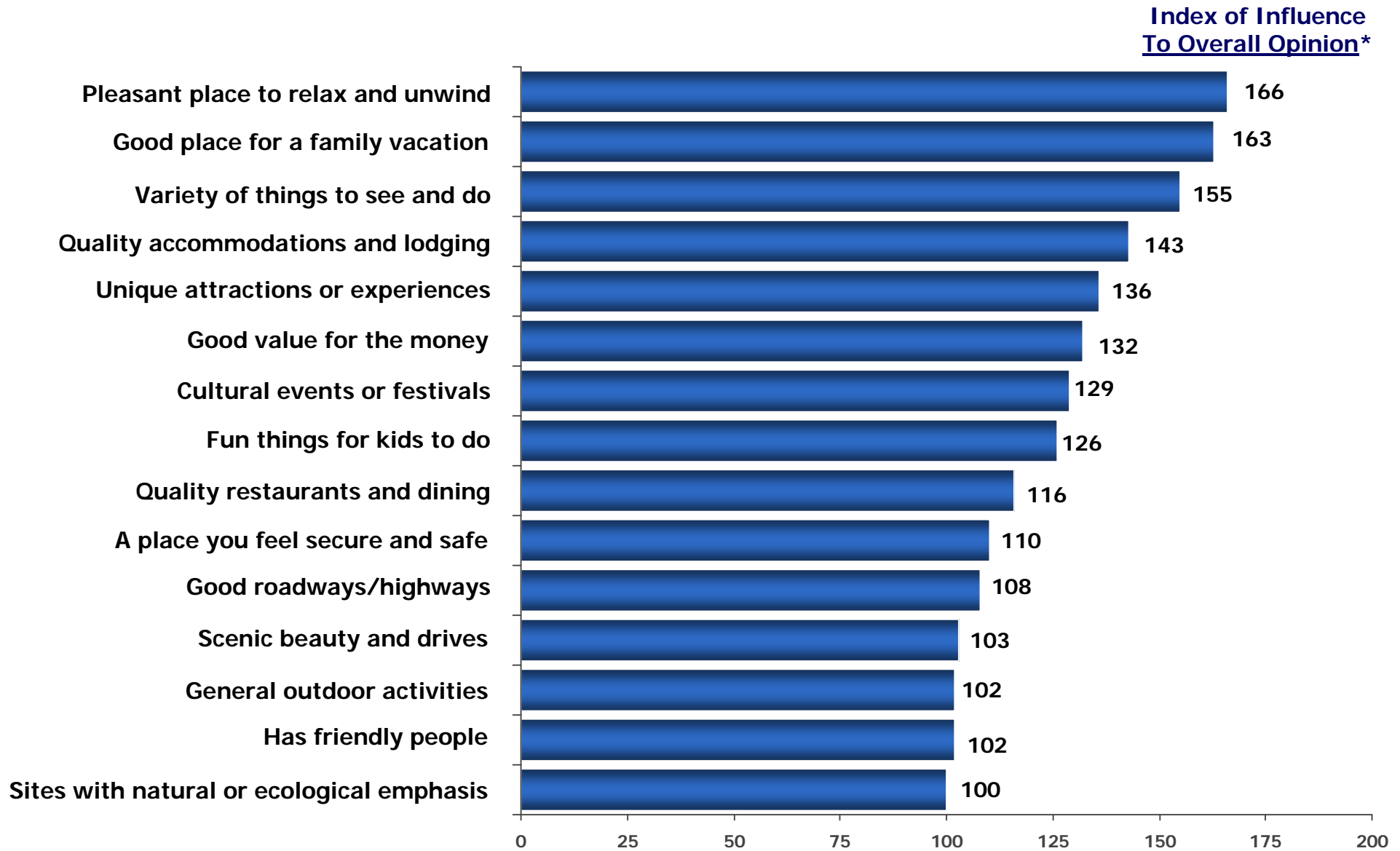
Q.9: Using a 5-point scale of excellent, good, average, fair, or poor, how would you personally rate the North Carolina Smoky Mountains, West of Asheville as a travel destination on each of the following attributes? (Ratings exclude 'Don't knows.')

Importance vs. Performance: North Carolina Smoky Mountains Area

- A multivariate analysis was used to determine which attributes are most important to (most greatly impact) a respondent's overall rating of the North Carolina Smoky Mountains. This "derived importance" provides an understanding of what actually impacts the opinions of potential visitors, rather than what they might "say" is important to them.
 - Among random regional travelers, the most important attributes to overall rating are a pleasant place to relax and unwind, good place for a family vacation, and a variety of things to see and do. Gambling/casino, camping, and motorcycle drives have the least impact on overall rating for this group.
 - Area tourism organizations can have the most impact on the overall rating of the area by improving the following: perception of value for the money, fun things for kids to do, variety of things to see and do, good for a family vacation, nightlife, and theme parks.
 - Improving perceptions of hiking, camping, motorcycle drives, and scenic beauty appear to have the least impact on overall rating. For scenic beauty, which rates lower in importance for random regional travelers than for inquirers who are more likely to have visited the area before, this may be because regional travelers do not appreciate the beauty until they see it, and/or that travelers making destination plans (especially to a place they have not yet been) are comparatively more focused on how to fill time/entertain kids.

Most Important Attributes Driving Overall Area Rating

(among random regional travelers)



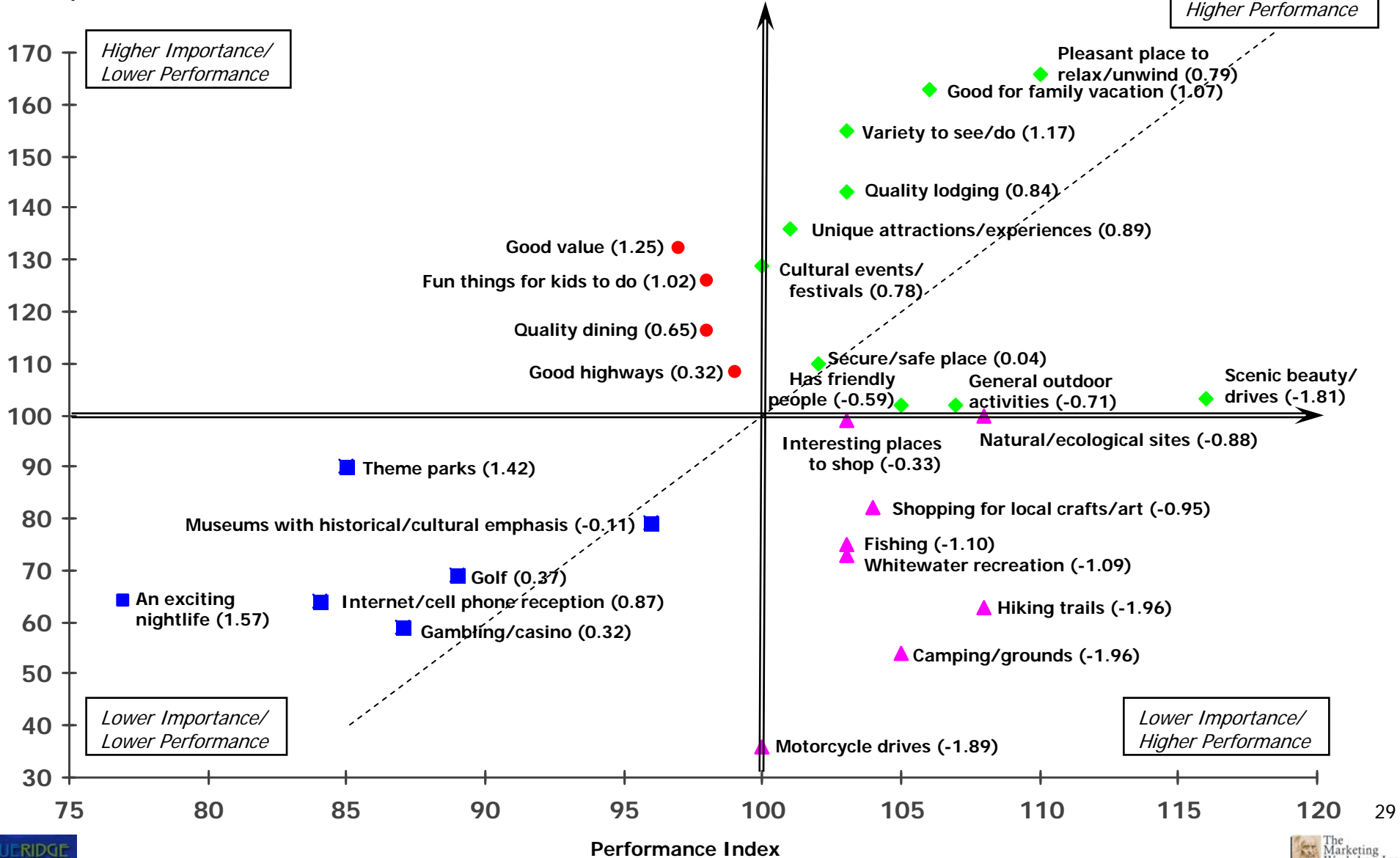
*Index of correlation with overall rating of the area, whether positive or negative.

Lower index attributes not shown; all attributes mapped on next slide

Derived Importance vs. Performance North Carolina Smoky Mountains Area

(among random regional travelers)

Derived Importance Index



The background of the slide is a light gray technical drawing or wireframe of a mechanical part, possibly a turbine or engine component, with various lines, curves, and circular features. A solid dark blue horizontal band runs across the middle of the slide, containing the section header.

V. Cherokee, NC

Recency of Trip to Cherokee, North Carolina

- Over one-half of random regional travelers say they have visited Cherokee before, compared with 74% who have ever visited the area as a whole.
- 18% of random regional travelers have never heard of Cherokee.

Ages 55+, those with higher incomes, and Caucasians are more likely than their counterparts to have ever visited Cherokee. There is no significant difference between those with and without children in the household.

	(Base)	Regional Travelers (600)
		<u>%</u>
<u>Total Ever Visited Cherokee</u>		<u>56</u>
Within the last year		11
1-2 years ago		7
2-3 years ago		4
3-4 years ago		6
5-9 years ago		9
10+ years ago		11
Have visited but don't recall when		8
Heard of but never been		26
Never heard of		<u>18</u>
		100

Q.11/Q.3a: When was the last time, if at all, you traveled to Cherokee, North Carolina?

Q.3a1: Have you heard of Cherokee, North Carolina?

Reasons Haven't Visited Cherokee, North Carolina

(among those aware of Cherokee, North Carolina but have never been)

- The most frequent reason for not having visited Cherokee before is "just haven't thought of visiting," suggesting the importance of getting Cherokee into the travelers' consideration frame, and then creating an interest in visiting.

<u>Key Unaided Comments</u>	(Base)	Regional Travelers (158)
		%
Just haven't/never thought of visiting		32
Never had desire to visit		15
Busy schedule/kids/school		14
Prefer to go to other destination(s)		11
Can't afford to travel		8
I don't gamble/have no desire to gamble		4
I don't know where it is/what to do in that area		4
Don't know/no special reason		10

(Miscellaneous comments not shown.)

Q.10/Q.11a: Why have you never visited Cherokee, North Carolina?

Top 2 Box Attribute Ratings of Cherokee, North Carolina

(among random regional travelers, excluding don't knows)

- Cherokee rates higher than the North Carolina Smoky Mountains area overall for gambling/casino and nightlife, and rates similarly for friendly people, cultural events/festivals, unique attractions/experiences, fun things for kids to do, and museums.

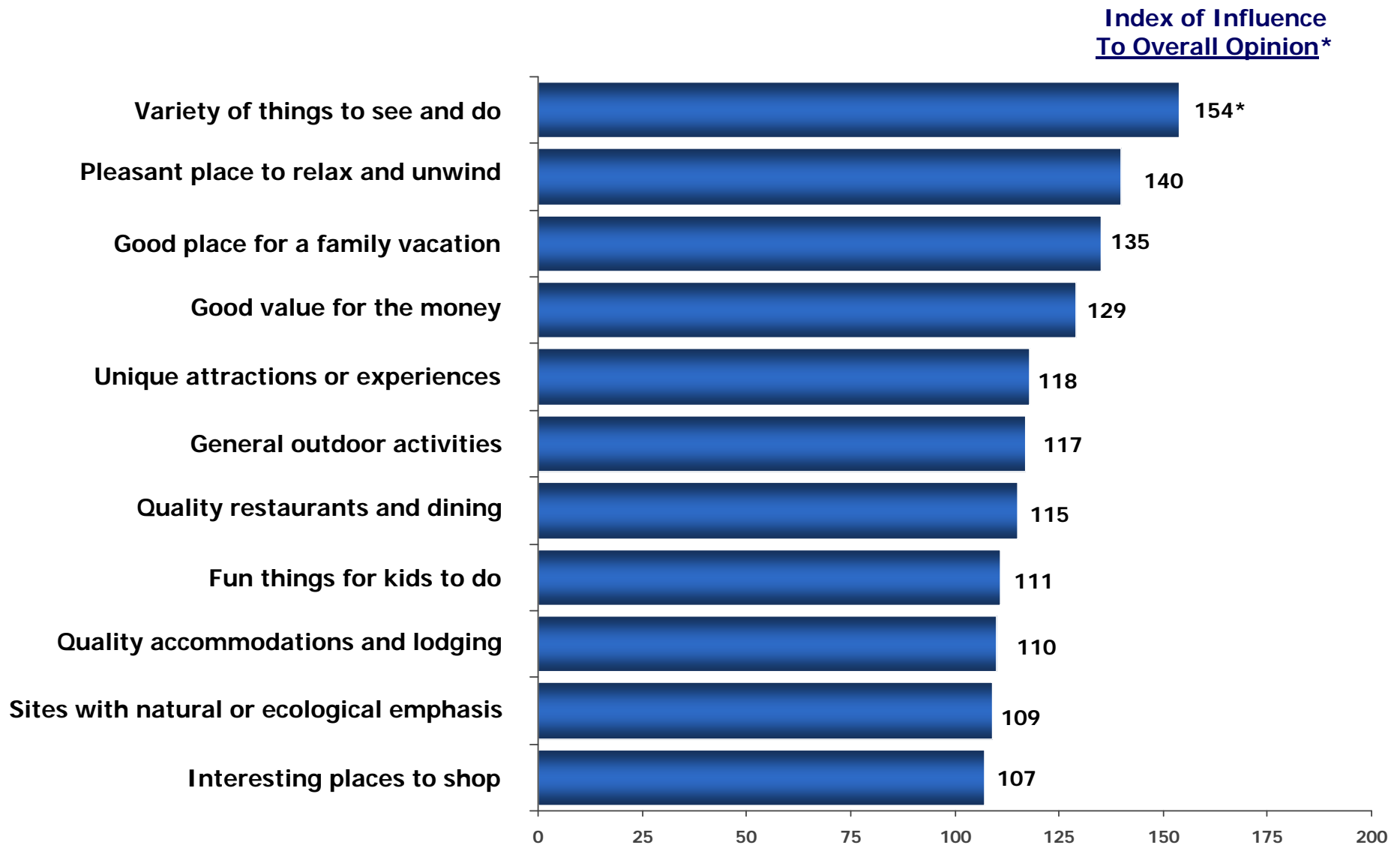
	<u>Rating of Cherokee</u>
	%
<u>Overall</u>	<u>72</u>
Scenic beauty/drives	88
Pleasant place to relax and unwind	76
General outdoor activities	76
Sites with natural or ecological emphasis	76
Has friendly people	76
Cultural events and festivals	74
Unique attractions & experiences	74
Good for family vacations	71
Gambling/casino	71
Quality accommodations & lodging	69
A place that you feel safe & secure	68
Interesting places to shop	68
Fun things for kids to do	68
Variety of things to see and do	67
Museums with historical & cultural emphasis	67
Quality restaurants & dining	64
Good roadways/highways	63
Good value for the money	60
An exciting nightlife	48

Importance vs. Performance: Cherokee, North Carolina

- **A multivariate analysis was used to determine which attributes are most important to (most greatly impact) a respondent's overall rating of Cherokee, North Carolina. This "derived importance" provides an understanding of what actually impacts the opinions of potential visitors, rather than what they might "say" is important to them.**
 - The most important attributes to overall rating are a variety of things to see and do, a pleasant place to relax and unwind, and a good place for a family vacation. Gambling/casino has the least importance to overall rating relative to all attributes.
 - Area tourism organizations can have the most impact on the overall rating of Cherokee with random regional travelers by improving the following: perception of value for the money, variety of things to see and do, quality dining, and nightlife. Although nightlife is indicated as one of the least important attributes to the overall rating of Cherokee, its much lower performance relative to importance is what makes this able to be leveraged.
 - For Cherokee, improvement of perceptions regarding scenic beauty/drives, gambling/casino, and friendly people would have the least impact on overall rating among random regional travelers because performance is already above average compared to other aspects of Cherokee. It may also be that these are "expected" or are the "price of entry" regarding travelers' opinion of the area.

Most Important Attributes Driving Overall Cherokee Rating

(among random regional travelers)



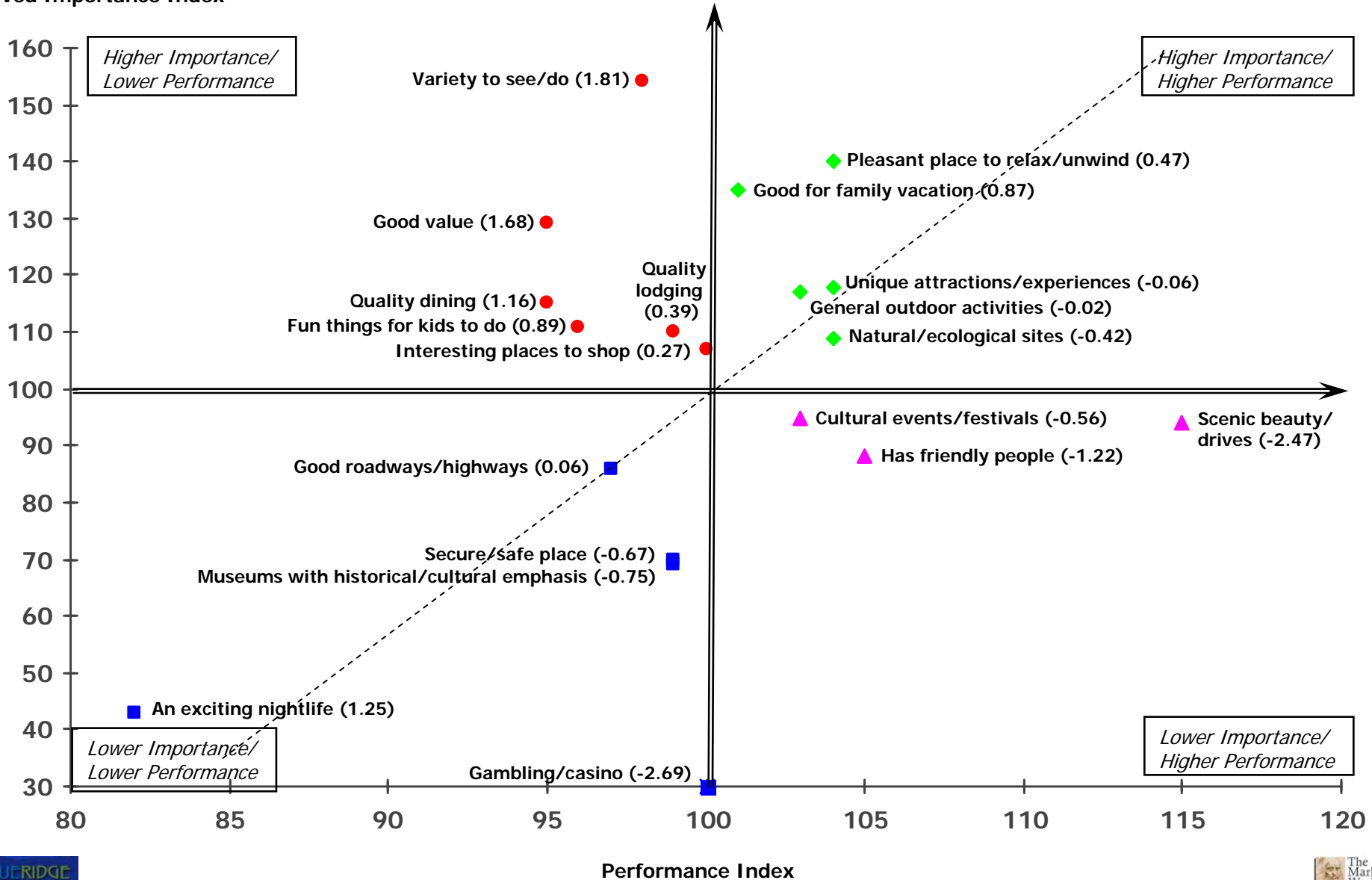
*Index of correlation with overall rating of the area, whether positive or negative.

Lower index attributes not shown; all attributes mapped on next slide

Derived Importance vs. Performance: Cherokee

(among random regional travelers)

Derived Importance Index



Conclusions and Recommendations

- **Three-quarters of target regional travelers have been to the North Carolina Smoky Mountain Area before, and two-thirds say they would consider a future trip. While they are not negative toward the area, it is clear that non-visitors are not sure what there is to do in the area and fewer visitors than is desirable are knowledgeable about all there is to see and do. In addition, particularly in today's economic climate, value for the money is an important driver of visitation.**

- **Visitors tend to be older and without kids, while analysis indicates that the overall rating of target regional travelers for the area would be most impacted through more activities, especially those for families/kids. The casino is not a driver of overall opinion of the area, although improvement in nightlife is sought.**

Conclusions and Recommendations (Cont'd)

- For Cherokee, improving the quality of restaurants and dining, nightlife, and a variety of things to do in Cherokee are what would most impact overall perceptions of Cherokee and indicates that more activities are desired beyond the casino. The casino rates lower in importance relative to other attributes, but this seems more indicative of the casino as an expectation than that it is not important at all. Families are looking for more family-friendly activities, and adults most likely desire more nightlife/activities along with the casino. And, as for the Smoky Mountain area as a whole, improving the perception of value for the money would have the most impact for Cherokee as well.
- Providing visitors and prospective visitors with example itineraries and/or more education about activities in the area along with package deals and/or an area discount pass would be motivating in terms of visitation as it addresses both the desire for more activities as well as value for the money.

Conclusions and Recommendations (Cont'd)

- There does appear to be an opportunity for an increase in family visitation provided more activities are made known/available. Additional research is recommended to test example itineraries or other marketing concepts as well as potential ideas for activities/attractions.
- Separate additional research would also be required to evaluate marketing tactics that would be most effective in increasing awareness of area activities/attractions.
- Lastly, to measure progress over time, it is important to regularly track the area's key performance metrics - awareness, imagery, and visitation - so that success of future marketing efforts can be measured.