

client: Chapel Hill

project name: Research Presentation Summary

date: 11/5/19

Research Methodology

Quantitative Survey for Travelers

- Respondents: 604
- Ages: 25-64
- States: NC, SC, VA, GA
- Consideration: Taken/Planning a trip less than 4 hours away & past/next 12 months

Qualitative Alumni Survey

- Respondents: 50
 - 28 of whom live and/or work in Charlotte

Online Anthropology

- Utilized a suite of tools and frameworks that gauge the sentiment of various audiences across online platforms (social media, review sites, travel sites, etc.) to gain deeper understanding of motivations and behaviors

Findings

Executive Overview

The research shows that Chapel Hill faces some challenges in both awareness and perceptions. Overall, past and prospective Chapel Hill visitors do have positive perceptions of the destination, but some don't know what there is to do beyond UNC sporting and college-related events. It's great that UNC-Chapel Hill has such a prominent brand because it gives Chapel Hill name recognition. Now we need to shed light on all the incredible experiences and activities the town and surrounding areas have to offer.

Finding #1:

Chapel Hill is mainly seen as a college town.

- Of respondents who aren't considering Chapel Hill for a trip, 25% say they don't know enough about CH and 20% say it's a college town.
- The top two activities associated with CH are attending a college sports event (54%) and special events, such as speakers, meet and greets, etc. (35%)

Implication:

There's an opportunity for the campaign to show there's more to do beyond campus and Chapel Hill is more than just basketball and red solo cups.

Finding #2:

The current traveler is mostly considering day trips to Chapel Hill during winter or spring, likely aligning with a basketball game and other sporting events.

- Day trips are the most popular trip type (78% of respondents)
- Spring (62%) and winter (50%) are the most popular trip times

Implication:

Confirms:

- UNC is closely associated with the town
- UNC sports influences visitation to the area
- Signals that we're not giving visitors enough exposure to experiences that will make them stay more than a day
- Opportunity to promote visitation during summer and fall to leisure travelers

Finding #3:

Overall, travelers have positive perceptions of Chapel Hill. They just don't have enough awareness of all that the town has to offer.

- Of respondents who aren't considering Chapel Hill for a trip that have never visited before, 32% say they don't know enough about Chapel Hill
- Of respondents who are considering Chapel Hill for a trip, they're also considering Durham (58%), Raleigh (44%), and Charlottesville (40%)

Implication:

Promoting events and activities is the key to presenting a well-rounded Chapel Hill that's just right for them.

Finding #4:

Recent visitors of Chapel Hill are less likely to promote it compared to neighboring destinations, likely due to their indifference toward Chapel Hill.

- 38% of respondents are "indifferent" when it comes to Chapel Hill
- 41% of people who have visited Chapel Hill would not recommend it to family or friends

Implication:

There's an opportunity to ignite enthusiasm and, in turn, create Chapel Hill advocates.

Finding #5:

Chapel Hill is not seen as overly welcoming.

- "Welcoming" is a top-five attribute that visitors associate with Chapel Hill
- Survey participants were not able to elaborate on their thought process to deem a destination "welcoming" or not

Implication:

Find opportunities to both demonstrate and communicate a sense of inclusion and hospitality.

Finding #6:

Alumni have strong perceptions and travelers' visitation decisions haven't been affected.

- 94% said they were not affected by any news coming out of Chapel Hill

Implication:

Negative news events can overshadow what people hear more generally about Chapel Hill. But they tend to fade into the background over time, and do not seem to be impacting travel decisions.