QUANTITATIVE SURVEY

TRAVELERS
(N=604)

25-64
AGE

NC / SC / VA / GA
LOCATION

TAKEN/PLANNING A TRIP:
>4 HOURS AWAY & PAST/NEXT 12 MONTHS CONSIDERATION

ALUMNI OF UNC CHAPEL HILL
N=50 (28 of whom live and/or work in Charlotte)

ONLINE ANTHROPOLOGY

WE UTILIZED A SUITE OF TOOLS AND FRAMEWORKS THAT AID IN TRULY UNDERSTANDING DEEPER MOTIVATIONS AND BEHAVIORS.
YOUR UNIQUE CHALLENGE:
THE POPULARITY OF SPORTS OVERSHADOWS CHAPEL HILL’S OTHER OFFERINGS.
REASONS WHY RESPONDENTS AREN'T CONSIDERING CHAPEL HILL FOR A TRIP IN THE NEXT 12 MONTHS  OUT OF TOTAL

I prefer to visit the beach 28%
I don't know enough about the Chapel Hill area 25%
It's a college town 20%
The Chapel Hill area doesn't seem interesting 19%
I've already been there and want to go somewhere new 17%
I prefer to visit the mountains 16%

ACTIVITIES ASSOCIATED WITH CHAPEL HILL

54% ATTENDING A COLLEGE SPORTS EVENT
35% SPECIAL EVENTS (SPEAKERS, MEET & GREETS, ETC.)
28% HEARING LIVE MUSIC
34% VISITING BARS/ BREWERIES
25% HIKING
24% WALKING
23% VISITING MUSEUMS
23% VISITING ART EVENTS/ INSTITUTIONS

Finding No 1

CHAPEL HILL IS MAINLY SEEN AS A COLLEGE TOWN.
This is especially true among visitors who are hesitant to promote the town. Many view the college town vibe as a major barrier to considering recommending Chapel Hill.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would actively avoid telling my family and friends about it</td>
<td>57%</td>
</tr>
<tr>
<td>I would rarely bring it up to my family and friends</td>
<td>41%</td>
</tr>
<tr>
<td>I would actively tell my family and friends about it</td>
<td>18%</td>
</tr>
</tbody>
</table>

**Source:** Survey about Chapel Hill, fielded May 2019

**Question:** Which statement would you most associate with each of these travel locations?

**Barrier:** It’s a college town.
### Activities associated with Chapel Hill:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attending a college sports event</td>
<td>54%</td>
</tr>
<tr>
<td>Special events (speakers, meet &amp; greets, etc.)</td>
<td>35%</td>
</tr>
<tr>
<td>Visiting bars/breweries</td>
<td>34%</td>
</tr>
<tr>
<td>Hearing live music</td>
<td>28%</td>
</tr>
<tr>
<td>Hiking</td>
<td>25%</td>
</tr>
<tr>
<td>Walking</td>
<td>24%</td>
</tr>
<tr>
<td>Visiting art events/institutions (art galleries, art museums, art shows)</td>
<td>23%</td>
</tr>
<tr>
<td>Visiting museums</td>
<td>23%</td>
</tr>
<tr>
<td>Mountain biking</td>
<td>22%</td>
</tr>
<tr>
<td>Boating /kayaking /canoeing /rafting</td>
<td>19%</td>
</tr>
<tr>
<td>Enjoying nature/the scenery</td>
<td>19%</td>
</tr>
<tr>
<td>Visiting historical sites</td>
<td>19%</td>
</tr>
<tr>
<td>Shopping</td>
<td>18%</td>
</tr>
<tr>
<td>Visiting a spa/retreat</td>
<td>18%</td>
</tr>
<tr>
<td>Visiting restaurants</td>
<td>18%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>17%</td>
</tr>
<tr>
<td>Camping</td>
<td>15%</td>
</tr>
<tr>
<td>Visiting the beach</td>
<td>13%</td>
</tr>
</tbody>
</table>

**AREAS RELATED TO SOCIAL GATHERINGS (SPECIAL EVENTS, LIVE MUSIC) ALSO RISE TO THE TOP, SUGGESTING **CHAPEL HILL IS SEEN AS A DESTINATION FOR NON-SOLITARY ACTIVITIES (E.G., WALKING, HIKING, RELAXING).**
TRAVELERS HAVE LIMITED PERCEPTIONS OF THE TOWN

These assumptions are some of the biggest barriers when thinking about whether to visit Chapel Hill.

Reasons why respondents aren’t considering Chapel Hill for a trip in the next 12 months:

- I prefer to visit the beach: 28%
- I don’t know enough about the Chapel Hill area: 25%
- It’s a college town: 20%
- The Chapel Hill area doesn’t seem interesting: 19%
- I’ve already been there and want to go somewhere new: 17%
- I prefer to visit the mountains: 16%
- I’ve already been there and didn’t like it enough to go back: 11%
- Not enough activity options: 9%
- I don’t plan to take a trip: 7%
- It’s too expensive: 7%
- There isn’t much for my kids to do: 7%

**CHAPEL HILL IS SEEN AS BEING TOO MUCH LIKE A COLLEGE TOWN, PEOPLE DON’T KNOW ENOUGH ABOUT THE AREA, OR THEY WANT SOMETHING NEW AFTER HAVING VISITED IT BEFORE.**

**SOURCE:** Survey about Chapel Hill, fielded May 2019
Despite visiting recently, their lack of knowledge about the town stretches even to restaurant, shopping, and kid activity options.

### Reasons why respondents aren’t considering Chapel Hill for a trip in the next 12 months:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Visited Chapel Hill in the past 12 months</th>
<th>Have not visited Chapel Hill in the past 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s a college town</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>I’ve already been there and want to go somewhere new</td>
<td>11%</td>
<td>28%</td>
</tr>
<tr>
<td>The Chapel Hill area doesn’t seem interesting</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>I’ve already been there and didn’t like it enough to go back</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>I don’t know enough about the Chapel Hill area</td>
<td>9%</td>
<td>32%</td>
</tr>
<tr>
<td>There isn’t much for my kids to do</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Not enough shopping options</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Not enough restaurant options</td>
<td>5%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**SOURCE:** Survey about Chapel Hill, fielded May 2019

**Question:** Chapel Hill/Hillsborough/Carboro, NC isn’t one of the destinations that you mentioned that you would consider visiting in the next 12 months. **Why aren’t you considering Chapel Hill for a trip?**

*Boxed values are significantly higher at 90% confidence level.*
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.
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.

FINDING No2

TRAVELERS FAVOR LOCATIONS THAT OFFER CONSISTENT “OUT-OF-ROUTINE” EXPERIENCES.

WHAT IS MOST IMPORTANT TO TRAVELERS?

1. Is a nice escape from my routine

2 (TIE). There's so much to do I could visit again and again

3. Offers a unique experience

3 (TIE). Is a nice escape from my routine

4. Has a good reputation

4 (TIE). Takes me out of my normal life

DAY TRIPS ARE THE MOST POPULAR TRIP TYPES

DAY TRIPS 78%

SPRING AND WINTER ARE THE Most POPULAR TRIP TIMES

SPRING 62%

WINTER 50%
### TIMING OF TRIP

<table>
<thead>
<tr>
<th>Season</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring</td>
<td>62%</td>
</tr>
<tr>
<td>Winter</td>
<td>50%</td>
</tr>
<tr>
<td>Summer</td>
<td>47%</td>
</tr>
<tr>
<td>Fall</td>
<td>44%</td>
</tr>
</tbody>
</table>

When did you visit this/these destination(s) in the past 12 months?

### TYPE OF TRIP

<table>
<thead>
<tr>
<th>Type of Trip</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day trip</td>
<td>82%</td>
</tr>
<tr>
<td>Weekend trip</td>
<td>11%</td>
</tr>
<tr>
<td>Long weekend (3-4 days)</td>
<td>4%</td>
</tr>
<tr>
<td>Week-long trip</td>
<td>1%</td>
</tr>
<tr>
<td>Longer than a week</td>
<td>2%</td>
</tr>
</tbody>
</table>

What type of trip did you take when you last visited this/these destination(s)?

### COMPANION

<table>
<thead>
<tr>
<th>Companion</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>With significant other</td>
<td>33%</td>
</tr>
<tr>
<td>With family</td>
<td>26%</td>
</tr>
<tr>
<td>With friends</td>
<td>21%</td>
</tr>
<tr>
<td>Alone</td>
<td>19%</td>
</tr>
</tbody>
</table>

Who did you go with when you last visited this/these destination(s)?

Day trips to Chapel Hill were among the most popular trip types, as were trips that involved traveling with a significant other.
<table>
<thead>
<tr>
<th>Personality Trait</th>
<th>Utility Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is a nice escape from my routine</td>
<td>2.1</td>
</tr>
<tr>
<td>There’s so much to do I could visit again and again</td>
<td>1.8</td>
</tr>
<tr>
<td>Offers a unique experience</td>
<td>1.8</td>
</tr>
<tr>
<td>Has a wide variety of activities</td>
<td>1.6</td>
</tr>
<tr>
<td>Has a good reputation</td>
<td>1.2</td>
</tr>
<tr>
<td>Takes me out of my normal life</td>
<td>1.2</td>
</tr>
<tr>
<td>Is good for the entire family</td>
<td>1.1</td>
</tr>
<tr>
<td>It’s a place that welcomes everyone</td>
<td>0.86</td>
</tr>
<tr>
<td>Is for people like me</td>
<td>0.86</td>
</tr>
<tr>
<td>Is always doing new and interesting things</td>
<td>0.79</td>
</tr>
<tr>
<td>Is different from other cities/towns I could visit</td>
<td>0.67</td>
</tr>
<tr>
<td>Has an interesting history</td>
<td>0.33</td>
</tr>
<tr>
<td>I’d recommend it to a friend/colleague/family member</td>
<td>-0.19</td>
</tr>
<tr>
<td>Is good for couples</td>
<td>-0.27</td>
</tr>
<tr>
<td>It feels inclusive</td>
<td>-0.38</td>
</tr>
<tr>
<td>There is cultural diversity</td>
<td>-0.44</td>
</tr>
<tr>
<td>It’s walkable</td>
<td>-0.55</td>
</tr>
<tr>
<td>I know exactly what to expect</td>
<td>-0.65</td>
</tr>
<tr>
<td>Is off the beaten path</td>
<td>-0.7</td>
</tr>
<tr>
<td>I hear a lot about it</td>
<td>-0.71</td>
</tr>
<tr>
<td>Is good for a group of friends</td>
<td>-0.9</td>
</tr>
<tr>
<td>Has rich traditions</td>
<td>-1.2</td>
</tr>
<tr>
<td>Is not corporate-like</td>
<td>-1.34</td>
</tr>
<tr>
<td>Lots of other tourists visit</td>
<td>-2.2</td>
</tr>
<tr>
<td>It has a funky vibe</td>
<td>-2.56</td>
</tr>
<tr>
<td>Offers sports I enjoy watching</td>
<td>-3.36</td>
</tr>
</tbody>
</table>

**Utility Score**

**Question:** What top five (5) personality traits would you most associate with [DESTINATION]? Please rate a “1” next to the most associated personality trait, “2” next to the second most, and so on until you’ve selected all five traits.

**SOURCE:** Survey about Chapel Hill, fielded May 2019
ONLINE, BASKETBALL SEEMS TO BE A BIG DRAW FOR FAMILIES

Basketball is the main event, and then other excursions are planned around it.

Source: Instagram

Source: Twitter

Source: Twitter

Source: Twitter

Source: Online Anthropology, conducted May-June 2019
IMPLICATIONS

CONFIRMS UNC IS CLOSELY ASSOCIATED WITH THE TOWN. ALSO CONFIRMS UNC SPORTS INFLUENCE VISITATION TO THE AREA.

THIS SIGNALS THAT WE’RE NOT GIVING VISITORS ENOUGH EXPOSURE TO EXPERIENCES THAT WILL MAKE THEM STAY MORE THAN A DAY.

THERE’S AN OPPORTUNITY TO PROMOTE VISITATION DURING SUMMER AND FALL TO LEISURE TRAVELERS.
ON THIRD-PARTY TRAVEL SITES, CHAPEL HILL IS NOT HIGHLIGHTED AS A DESTINATION

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

Finding #3

NC Tripping was a 2019 Indy Week Finalist for Best Local-Interest Website.

CITIES
- Asheville
- Greensboro
- Charlotte
- Raleigh
- Durham

SMALL TOWNS
- Bowling Rock
- New Bern
- Brevard
- Shelby
- Goldsboro

Those considering Chapel Hill, also consider visiting nearby cities.

Durham 62%
Raleigh 50%

Reasons why respondents aren’t considering Chapel Hill for a trip in the next 12 months:

- It’s a college town
- I’ve already been there and want to go somewhere new
- The Chapel Hill area doesn’t seem interesting
- I’ve already been there and didn’t like it enough to go back
- I don’t know enough about the Chapel Hill area
- There isn’t much for my kids to do
- Not enough shopping options
- Not enough restaurant options

Visited Chapel Hill in the past 12 months
- 32%

Have not visited Chapel Hill in the past 12 months
- 68%
MANY PEOPLE THINK OF CHAPEL HILL AS A ‘ONE AND DONE’ DESTINATION

Unless there is a reason or obligation to come back, there are only a few areas of interest that come to mind.

Source: TripAdvisor

Source: Twitter

Source: TripAdvisor
The biggest barrier for alumni is that they want to have new experiences. Other obstacles include perceived shortcomings around activities, lodging, and shopping options.

**Reasons why respondents aren’t considering Chapel Hill for a trip in the next 12 months:**

<table>
<thead>
<tr>
<th>ALUMNI VISITATION BARRIERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
<tr>
<td>6</td>
</tr>
<tr>
<td>7</td>
</tr>
<tr>
<td>8</td>
</tr>
<tr>
<td>9</td>
</tr>
<tr>
<td>10</td>
</tr>
</tbody>
</table>

**Source:** Survey about Chapel Hill, fielded May 2019

Question: Chapel Hill/Hillsborough/Carboro, NC isn’t one of the destinations that you mentioned that you would consider visiting in the next 12 months. Why aren’t you considering Chapel Hill for a trip?
TELL ENTICING STORIES

HIGHLIGHT UNIQUE CHAPEL HILL EXPERIENCES

Some spend the time leading up to their next getaway exploring their destination. Others just want to stay in the loop after their trip. There's an opportunity to keep people excited about Chapel Hill before and after their visit.
ON THIRD-PARTY TRAVEL SITES, CHAPEL HILL IS NOT HIGHLIGHTED AS A DESTINATION

Chapel Hill is often treated as an afterthought and is not given the same type of platform as other cities.

NC TRIPPING WAS A 2019 INDY WEEK FINALIST FOR BEST LOCAL-INTEREST WEBSITE

SOURCE: NC Tripping
CHAPEL HILL CONSIDERERS ARE ALSO THINKING ABOUT NEARBY TOWNS

Other destinations considered among Chapel Hill Considerers:

- Nearly half of Chapel Hill considerers are also considering Charlottesville as a travel destination in the next 12 months.

<table>
<thead>
<tr>
<th>City/Town</th>
<th>Consideration Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asheville</td>
<td>12%</td>
</tr>
<tr>
<td>Durham</td>
<td>58%</td>
</tr>
<tr>
<td>Raleigh</td>
<td>44%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>20%</td>
</tr>
<tr>
<td>Greensboro</td>
<td>39%</td>
</tr>
<tr>
<td>Savannah</td>
<td>13%</td>
</tr>
<tr>
<td>Charleston</td>
<td>13%</td>
</tr>
<tr>
<td>Williamsburg</td>
<td>15%</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>40%</td>
</tr>
</tbody>
</table>

Total: 24%

Base: Chapel Hill Considerers (N=98)

SOURCE: Survey about Chapel Hill, fielded May 2019
PROMOTING EVENTS AND ACTIVITIES IS THE KEY TO PRESENTING A WELL-ROUNDED CHAPEL HILL THAT’S JUST RIGHT FOR THEM.
RECENT VISITORS OF CHAPEL HILL ARE LESS LIKELY TO PROMOTE IT COMPARED TO NEIGHBORING DESTINATIONS, LIKELY DUE TO THEIR INDIFFERENCE TOWARD CHAPEL HILL.

"INDIFFERENCE" (5-7 NPS SCORE)

<table>
<thead>
<tr>
<th>City</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapel Hill</td>
<td>38%</td>
</tr>
<tr>
<td>Raleigh</td>
<td>38%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>32%</td>
</tr>
<tr>
<td>Asheville</td>
<td>24%</td>
</tr>
<tr>
<td>Williamsburg</td>
<td>19%</td>
</tr>
<tr>
<td>Savannah</td>
<td>16%</td>
</tr>
<tr>
<td>Charleston</td>
<td>16%</td>
</tr>
</tbody>
</table>

CHAPEL HILL VISITORS AREN'T AS DRIVEN TO TELL OTHERS ABOUT THE TOWN

- Chapel Hill: 57%
- Greensboro: 50%
- Durham: 48%
- Charleston: 45%
- Raleigh: 46%
- Savannah: 45%
- Asheville: 38%
- Williamsburg: 38%
- Charlotte: 31%
- Charlottesville: 30%
- Savannah: 24%
- Asheville: 20%
- Charleston: 19%
- Williamsburg: 16%
- Raleigh: 16%
- Savannah: 15%
- Asheville: 14%
- Chapel Hill: 13%
- Greensboro: 12%
- Durham: 11%
- Williamsburg: 10%
- Raleigh: 10%
- Savannah: 9%
- Asheville: 9%
- Chapel Hill: 8%
- Greensboro: 7%
- Durham: 6%
- Williamsburg: 6%
- Raleigh: 5%
- Savannah: 5%
- Asheville: 4%
- Chapel Hill: 3%
- Greensboro: 3%
- Durham: 2%
- Williamsburg: 2%
- Raleigh: 2%
- Savannah: 2%
- Asheville: 2%
- Chapel Hill: 1%
- Greensboro: 1%
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- Asheville: 1%
- Chapel Hill: 1%
- Greensboro: 1%
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- Asheville: 1%
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- Savannah: 1%
- Asheville: 1%
- Chapel Hill: 1%
- Greensboro: 1%
- Durham: 1%
- Williamsburg: 1%
- Raleigh: 1%
- Savannah: 1%
- Asheville: 1%
- Chapel Hill: 1%
- Greensboro: 1%
- Durham: 1%
- Williamsburg: 1%
RECENT VISITORS TO CHAPEL HILL ARE LESS LIKELY TO BE STRONG PROMOTERS OF THE TOWN

That’s especially the case when compared with Charlottesville.

PROMOTERS (9-10)
- Savannah: 73%
- Charleston: 67%
- Williamsburg: 61%
- Asheville: 59%
- Raleigh: 40%
- Charlotte: 37%
- Charlottesville: 32%
- Chapel Hill: 29%
- Greensboro: 26%
- Durham: 20%

PASSIVES (7-8)
- Savannah: 15%
- Charleston: 26%
- Williamsburg: 29%
- Asheville: 27%
- Raleigh: 32%
- Charlotte: 27%
- Charlottesville: 26%
- Chapel Hill: 30%
- Greensboro: 25%
- Durham: 31%

DETRACTORS (0-6)
- Savannah: 12%
- Charleston: 8%
- Williamsburg: 11%
- Asheville: 14%
- Raleigh: 28%
- Charlotte: 36%
- Charlottesville: 42%
- Chapel Hill: 41%
- Greensboro: 49%
- Durham: 49%

SOURCE: Survey about Chapel Hill, fielded May 2019

Base: Visited cities for vacation/leisure in the past 12 months (Base Varies)
This is more likely due to less enthusiastic support for Chapel Hill.

NPS: Chapel Hill

- Detractors: 41%
- Passives: 30%
- Promoters: 29%

April:
- 19% extremely likely
- 3% not at all likely
- 3% neutral
- 16% indifferent
- 10% neutral
- 11% indifferent
- 20% neutral
- 9% indifferent
- 21% neutral

Source: Survey about Chapel Hill, fielded May 2019

NPS – How likely are you to recommend the following travel destination(s) to family or friends?
(10) - It’s the best place for culture and diversity, for couples or families. You can find literally everything there.

(9) - Beautiful area, especially around the university. Feels safe and quiet and has lots of great architecture.

(7) - I had a nice time, and this is a positive rating...little hard to navigate around...Hillsborough was pretty and quiet - good for a day trip...Chapel Hill and Carrboro were funky and fun.

(6) - They have great restaurants to eat at. I would not vacation there just a leisure trip to eat with family or friends.

(5) - There are some great things and some others that aren't so great. Traffic in the area is horrible, and they are not as welcoming/charming as other small town areas in North Carolina.

(2) - Not much there besides UNC.

“(X)” Denotes NPS score

SOURCE: Survey about Chapel Hill, fielded May 2019
THIS IS SOMETHING THAT CHAPEL HILL SHARES WITH DURHAM, GREENSBORO, AND RALEIGH

“INDIFFERENCE” (5-7 NPS SCORE)

Greensboro 46%  Durham 45%  Raleigh 38%  Chapel Hill 38%  Charlotte 32%  Charlottesville 31%  Asheville 24%  Savannah 22%  Williamsburg 19%  Charleston 16%

SOURCE: Survey about Chapel Hill, fielded May 2019

NPS – How likely are you to recommend the following travel destination(s) to family or friends?
Travelers to Chapel Hill aren’t as driven to tell others about the town.

<table>
<thead>
<tr>
<th>City</th>
<th>Recommend</th>
<th>Rarely Bring</th>
<th>Actively Avoid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Williamsburg</td>
<td>89%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Savannah</td>
<td>88%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Asheville</td>
<td>83%</td>
<td>14%</td>
<td>3%</td>
</tr>
<tr>
<td>Charleston</td>
<td>79%</td>
<td>21%</td>
<td>3%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>67%</td>
<td>30%</td>
<td>3%</td>
</tr>
<tr>
<td>Raleigh</td>
<td>66%</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>63%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>Chapel Hill</td>
<td>57%</td>
<td>40%</td>
<td>3%</td>
</tr>
<tr>
<td>Greensboro</td>
<td>50%</td>
<td>45%</td>
<td>5%</td>
</tr>
<tr>
<td>Durham</td>
<td>48%</td>
<td>45%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Source:** Survey about Chapel Hill, fielded May 2019

**Base:** Visited cities for vacation/leisure in the past 12 months (base varies)

**NPS – How likely are you to recommend the following travel destination(s) to family or friends?**
CHAPEL HILL IS MORE ASSOCIATED WITH SITES AND LANDMARKS, WHICH MAY CAUSE IT TO HAVE A LESS MASS APPEAL THAN DURHAM AND RALEIGH, WHICH ARE MORE ASSOCIATED WITH ‘FOOD & DRINK’ AND ‘NIGHTLIFE’.

<table>
<thead>
<tr>
<th></th>
<th>Chapel Hill</th>
<th>Durham</th>
<th>Raleigh</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food &amp; Drink</strong></td>
<td>5</td>
<td>23</td>
<td>19</td>
</tr>
<tr>
<td><strong>Fun &amp; Games</strong></td>
<td>5</td>
<td>18</td>
<td>39</td>
</tr>
<tr>
<td><strong>Nightlife</strong></td>
<td>10</td>
<td>18</td>
<td>60</td>
</tr>
<tr>
<td><strong>Sightseeing</strong></td>
<td>17</td>
<td>19</td>
<td>45</td>
</tr>
<tr>
<td><strong>Shopping</strong></td>
<td>11</td>
<td>21</td>
<td>44</td>
</tr>
</tbody>
</table>

**Source:** Online Anthropology, conducted May-June 2019; Things to Do Highlights on TripAdvisor
COMPIRED TO CHARLOTTESVILLE, CHAPEL HILL IS SEEN AS LACKING IN FOOD AND DRINK AND SHOPPING EXPERIENCES

CHAPEL HILL

FOOD & DRINK 5  FUN & GAMES 5
NIGHTLIFE 10  SIGHTSEEING 17  SHOPPING 11

CHARLOTTESVILLE

FOOD & DRINK 33  FUN & GAMES 16
NIGHTLIFE 11  SIGHTSEEING 18  SHOPPING 27

SOURCE: Online Anthropology, conducted May-June 2019; Things to Do Highlights on Trip Advisor
IMPLICATION

THERE IS AN OPPORTUNITY TO IGNITE ENTHUSIASM AND, IN TURN, CREATE CHAPEL HILL ADVOCATES.
Finding No. 5

Chapel Hill is not seen as overly “welcoming.”

While there is room for improvement, ‘welcoming’ does rank in Chapel Hill’s top five traits when viewed by total personality traits.

Personality Traits

1. Charming 51%
2. Artsy 44%
3. Unique 42%
4. Cultured 38%
5. Welcoming 37%

Chapel Hill lags behind other towns when based on “welcoming.”

Certain groups feel unwelcome in Chapel Hill:

- Nola Darling: All love visiting Chapel Hill and seeing all the melanin❤️, y'all better add some brown to that blue👌.
  
  10:58 AM - 6 Apr 2017

- Aisha Alexander: As I shared #onhere earlier, when visiting Chapel Hill during their annual Halloween festivities, I would see several white students dressed in Blackface. I didn’t understand it’s acceptance. I was furious. I was so glad I went to an HBCU.
  
  8:56 PM - 5 Feb 2019

Chapel Hill’s lack of “welcoming” is based on past visitation, not perception viewed as “welcoming.”

Visited Chapel Hill in the past 12 months: 28%

Have not visited Chapel Hill in the past 12 months: 44%
IT LAGS BEHIND OTHER TOWNS IN BEING SEEN AS WELCOMING, EXCITING, AND ADVENTUROUS

‘Welcoming’ is the biggest challenge for the town, especially compared to Charlottesville.

What top five (5) personality traits would you most associated with [DESTINATION]. Please place a “1” next to the most associated personality trait, “2” next to the second most, and so on until you’ve selected all five traits.

SOURCE: Survey about Chapel Hill, fielded May 2019
THE ‘WELCOMING’ LAG IS DRIVEN BY THOSE WHO HAVE ALREADY VISITED CHAPEL HILL

This finding is concerning given it is based on real-life experiences of Chapel Hill.

What top five (5) personality traits would you most associated with [DESTINATION]. Please place a “1” next to the most associated personality trait, “2” next to the second most, and so on until you’ve selected all five traits. Boxed values are significantly higher at 90% confidence level.
CHAPEL HILL’S STRENGTHS ARE BEING PERCEIVED AS ARTSY, YOUNG, AND PROGRESSIVE

In all of these areas, it leads Charlottesville.

What top five (5) personality traits would you most associated with [DESTINATION]. Please place a “1” next to the most associated personality trait, “2” next to the second most, and so on until you’ve selected all five traits.

SOURCE: Survey about Chapel Hill, fielded May 2019
CERTAIN GROUPS MAY FEEL UNCOMFORTABLE IN CHAPEL HILL

Seeing other people like them reflected in the town makeup may make them feel more at home.

As I shared #onhere earlier, when visiting Chapel Hill during their annual Halloween festivities, I would see several white students dressed in Blackface. I didn’t understand it’s acceptance. I was furious. I was so glad I went to an HBCU.

Source: Twitter

All love visiting Chapel Hill and seeing all the melanin'y'all better add some brown to all that blue 😍❤️

Source: Twitter

So how gay friendly is Raleigh/The Triangle/Chapel Hill?

Title says it all. Am a gay man (who already has a partner), looking to move to the Raleigh area, for a change of life, I may already have a job waiting as well.

So how gay friendly is Raleigh-Durham? I am planning on visiting later in the year.

Source: Reddit

Take A Walk...Look Around

This main street is about 12-15 NYC blocks long lined with shops and restaurants and bars. It is full of 20 year olds having a fun time. If you are over 50, do not expect too much. Food is mostly pub food and inexpensive and not of great quality. It is still nice to be part of the scene but one night does it.

Show less

Date of experience: April 2018

Source: TripAdvisor

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SOURCE: Online Anthropology, conducted May-June 2019
IMPLICATION

FIND OPPORTUNITIES TO BOTH DEMONSTRATE AND COMMUNICATE A SENSE OF INCLUSION AND HOSPITALITY.
FEW TRAVELERS ARE SWAYED BY THE NEWS OUT OF CHAPEL HILL WHEN CONSIDERING IT:

ALUMNI HAVE STRONG POSITIVE PERCEPTIONS AND TRAVELERS’ VISITATION DECISIONS HAVEN’T BEEN AFFECTED BY NEGATIVE NEWS COVERAGE.

AFFECTED?

“Ongoing academic cheating scandal at UNC (and their lack of ethics in responding to it)”

“UNC Chapel Hill seems super political”

“The whole Silent Sam protests and controversy on the university grounds. It sounds like Chapel Hill culture is governed by a bunch of bratty, drunk millennials rather than thinking intellectuals”

“Crime in that area seems pretty high”

94% NO 6% YES
CONVERSELY, UNC ALUMNI VIEW THE TOWN AS MORE WELCOMING

This may be due to the memories they have, the time they’ve spent there, and the sense of belonging they felt as a student.

WHEN ASKED TO COME UP WITH A SHORT SLOGAN THAT DESCRIBES THE ESSENCE OF CHAPEL HILL, BEYOND THE UNIVERSITY, MANY MENTIONED DIVERSITY AND CULTURE:

“Chapel Hill is progressive, accepting, and welcoming”

“Southern Hospitality” that welcomes all”

“A family-centered town that encourages self-expression”

“Chapel Hill, a place that welcomes everyone”
ASSOCIATIONS WITH CHAPEL HILL HAVE ShiftED SOMEWHAT FROM SPORTS TO POLITICS

Searches about Chapel Hill used to have the highest spikes during sporting events, but recently social/political events have gained more attention.

SOURCE: Google Trends
FEW TRAVELERS ARE SWAYED BY THE NEWS OUT OF CHAPEL HILL WHEN CONSIDERING IT

“Ongoing academic cheating scandal at UNC (and their lack of ethics in responding to it)”

“UNC Chapel Hill seems super political”

“The whole Silent Sam protests and controversy on the university grounds. It sounds like Chapel Hill culture is governed by a bunch of bratty, drunk millennials rather than thinking intellectuals”

“Crime in that area seems pretty high”

AFFECTED?

94% NO
6% YES

SOURCE: Survey about Chapel Hill, fielded May 2019
CONSIDERATION IS HIGHER AMONG ALUMNI

This is likely due to their prior experience in the area.

<table>
<thead>
<tr>
<th>City</th>
<th>Alumni</th>
<th>Travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapel Hill</td>
<td>55%</td>
<td>24%</td>
</tr>
<tr>
<td>Charleston</td>
<td>61%</td>
<td>47%</td>
</tr>
<tr>
<td>Asheville</td>
<td>64%</td>
<td>41%</td>
</tr>
<tr>
<td>Savannah</td>
<td>58%</td>
<td>38%</td>
</tr>
<tr>
<td>Charlotte</td>
<td>55%</td>
<td>33%</td>
</tr>
<tr>
<td>Williamsburg</td>
<td>52%</td>
<td>25%</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>52%</td>
<td>24%</td>
</tr>
<tr>
<td>Raleigh</td>
<td>34%</td>
<td>19%</td>
</tr>
<tr>
<td>Durham</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>Greensboro</td>
<td>25%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Question: Which of the following cities and towns would you consider visiting in the next 12 months for vacation/leisure whether for a short/long trip?

SOURCE: Survey about Chapel Hill, fielded May 2019
IMPLICATION

NEGATIVE NEWS EVENTS CAN OVERSHADOW WHAT PEOPLE HEAR MORE GENERALLY ABOUT CHAPEL HILL. BUT THEY TEND TO FADE INTO THE BACKGROUND OVER TIME.
CONSIDERATIONS

HOW CAN WE BETTER LEVERAGE ALUMNI?

HOW CAN WE TIE IN CHAPEL HILL MORE TO THE TRIANGLE?

HOW DO WE GET VISITORS TO KNOW THAT THERE IS MORE TO DO, WHICH IN TURN, WILL EXTEND THEIR LENGTH OF STAY?

HOW DO WE LEVERAGE LOCAL BUSINESSES AND THE COMMUNITY TO DEMONSTRATE AN OVERALL SENSE OF WELCOMING?

HOW DO WE ENCOURAGE BUSINESSES TO LIVE INTO OUR CAMPAIGN’S BRAND PROMISE?

HOW CAN WE INCREASE ENTHUSIASM OF VISITORS SO THAT THEY INHERENTLY BECOME VOCAL ABOUT THEIR EXPERIENCE?

HOW DO WE HARNESS THE FEELING THAT PEOPLE ARE GOING FOR WHEN THEY COME FOR BASKETBALL GAMES, AND REPLICATE THAT FEELING MORE BROADLY?

HOW DO WE INCREASE ENTHUSIASM OF VISITORS SO THAT THEY INHERENTLY BECOME VOCAL ABOUT THEIR EXPERIENCE?

HOW CAN WE BETTER LEVERAGE ALUMNI?
just do you campaign
just do you

• Capture the progressive, welcoming spirit of Chapel Hill and Orange County
• Embrace the individual while allowing people to picture themselves here
• Recognize our diverse audience members and their range of interests
• Promote experiences the area offers rather than solely focusing on businesses
• Achieve balance between Chapel Hill, Carrboro, and Hillsborough
From modern cocktails to campus traditions, there’s no one way to
experience Chapel Hill, Hillsborough, and Carrboro. Find what you
love, or discover something new. Whatever you do here, just do you.
VisitChapelHill.org
just do you: digital ads

- Animated banner ads
- Rich media ads
just do you: social ads

facebook carousel

instagram story

pinterest
just do you: facebook instant experience—fill a day

Visit Chapel Hill & Orange County, NC

Coming to Chapel Hill? Or driving through? Take a break—or a whole day—to have some fun. Whatever you do here, just do you.

Quick Trip Ideas

5G

3 Comments 4 Shares

Like Comment Share
Whatever you do here, just do you.

Whether you’re coming for work or for play, there are plenty of excuses to extend your stay. Revisit your favorite Chapel Hill icons, or discover something new in Carrboro and Hillsborough. We invite you to be comfortable, be adventurous, and, most of all, be yourself.
just do you: mini-doc video

Home grown
next steps

• research results will inform future campaign planning
• evaluate considerations that arose from research
• seek opportunities to promote welcoming spirit of Chapel Hill/ Orange County