

# North Carolina I-95 Destination Corridor



**Visitor/Non-Visitor  
Brand Research Results  
June 2007**

# Survey Research Methodology

- ⇒ Online survey developed and administered to people who had at one point in the recent past inquired about visiting the NC I-95 Corridor region and/or the state of North Carolina. Database contact listings were provided by some of the counties along the NC I-95 Corridor and by the NC Department of Tourism.
- ⇒ A useable sample size of 934 was obtained which gives an overall sample size margin of error of  $\pm 3.21\%$  19 out of 20 times. Even the two key subsamples—visitors (504) and non-visitors (430)—have margins of error that are very good: visitors ( $\pm 4.37\%$ ) and non-visitors ( $\pm 4.73\%$ ).
- ⇒ Responses were collected from June 3 to June 13, 2007 and analyzed thereafter.

# Brand Research Methodology Cont'd

- ⇒ Information collected and analyzed on the following attributes:
  - ❖ Respondent demographics
  - ❖ Trip characteristics
  - ❖ Destination imagery, unique attractions and functional benefits
  - ❖ Destination emotional benefits
  - ❖ Major attraction satisfaction level
  - ❖ Communities visited
  - ❖ Suggested visitor experience improvements

**Destination Brand  
Image/Perception  
Survey**

# Destination Brand Survey Results

Primary Purpose of Trip (N=453)	
Purpose	Percentage of Visitors
Leisure	33.6
Pass-Thru	31.8
Visiting Friends and Relatives	22.7
Business/Corporate	6.8
Personal	3.2
Military Related	1.8

# Destination Brand Survey Results Cont'd

Respondent Demographics (% of respondents)		
	Visitors	Non-Visitors
Origin		
US South	61.8	43.4
US Northeast	17.5	16.7
US Midwest	10.1	17.1
Canada	5.9	14.5
US West	4.7	8.3

# Destination Brand Survey Results Cont'd

## Respondent Demographics Origin of Southern Visitors by State

State	% of Respondents	State	% of Respondents
North Carolina	43.5	Kentucky	1.9
Virginia	16.7	Oklahoma	1.4
Florida	11.5	Tennessee	1.0
Maryland	5.7	Mississippi	1.0
South Carolina	5.3	District of Columbia	1.0
Texas	4.8	Delaware	1.0
West Virginia	2.4	Alabama	0.5
Georgia	2.4		



# Destination Brand Survey Results Cont'd

## Respondent Demographics (% of respondents)

	Visitors	Non-Visitors
Age (mean in years)	36.0	32.9
Gender		
Male	49.9	42.3
Female	50.1	57.7

# Destination Brand Survey Results Cont'd

Respondent Demographics Cont'd (% of respondents)		
	Visitors	Non-Visitors
<b>Marital Status</b>		
Single	9.9	13.3
Married	76.6	70.1
Other	13.7	16.6
<b>Education (with degree)</b>	68.8	67.4
<b>Race</b>		
White	93.4	94.8
Other	6.6	5.2
<b>Household Income (below \$100K)</b>	64.3	76.1
<b>Household Income (above \$100K)</b>	35.6	24.0



# Destination Brand Survey Results Cont'd

Trip Characteristics	
Characteristic	Visitors
% visited in 2007	34.0
% visited in 2006	25.4
Avg. no. of visits in last 3 years	3.84
Avg. length of day visit (hours)	5.39
Avg. length of overnight stay (nights along I-95)	3.83
Transportation Type (N=451)	Percentage of Respondents
Private vehicle	84.3
Rented vehicle	8.6
RV	3.1
Other	4.0

# Destination Brand Survey Results Cont'd

## Trip Characteristics (% of respondents)

Top 5 activities (based on time) during last visit	Visitors
Sightseeing	35.7
Dining experience	33.5
Visiting friends and relatives	26.2
Outlet shopping	25.0
Family/recreational vacation	23.2
Historical/heritage sites	22.0

# Destination Brand Survey Results Cont'd

Trip Characteristics (% of respondents)	
Community Overnight Visitors Stayed (N=204)	Visitors
Fayetteville	36.8
Rocky Mount	16.2
Fort Bragg	7.8
Roanoke Rapids/Weldon	7.8
Smithfield/Selma	6.9
Lumberton	4.4
Dunn	2.5
Wilson	2.5

# Destination Brand Survey Results Cont'd

Trip Characteristics (% of respondents)	
Communities Visited (N=410)	Visitors
Fayetteville	34.9
Rocky Mount	27.8
Smithfield/Selma	19.0
Fort Bragg	17.3
Roanoke Rapids/Weldon	12.2
Lumberton	11.7
Wilson	8.5
Dunn	5.9
Halifax	4.1
Benson	2.4

# Destination Brand Survey Results Cont'd

Main Destination Images/Functional Benefits	
Visitors (N=277)	Non-Visitors (N=132)
Natural Environment (beautiful and well preserved)	Natural Environment (beautiful and well preserved)
Friendly people	Historical
Historical	None
Rural	Trees
Convenient (good facilities, easy access from Interstate)	Mountains
Countryside/farms	Civil War sites
None	Small towns

# Destination Brand Survey Results Cont'd

## Major Factors of Importance to Visit a Destination (mean rating based on a 5-point scale)

Factor	Visitors	Non-Visitors
Offers personal safety	4.36	4.37
The destination is clean	4.34	4.33
Hospitable, friendly people	4.31	4.30
Expanse and beauty of landscape	4.21	4.26
Relaxation	4.25	4.20
The destination is affordable	4.19	4.28
Excellent service quality	4.19	4.23
Places of historical or cultural interest	4.16	4.20
The destination provides good value	4.15	4.15
Good weather	3.98	4.05



# Destination Brand Survey Results Cont'd

## Top Descriptive Destination Statements of the NC I-95 Corridor (mean rating based on a 5-point scale)

Statement	Visitors	Non-Visitors
The area contains beautiful nature and scenery	4.10	3.91
The area is rich in history and culture	3.97	3.82
The overall mood of the area is peaceful and relaxed	3.93	3.80
People residing in NC I-95 Corridor communities are warm and friendly	3.96	3.70
NC I-95 Corridor communities are easily accessible	3.87	3.60

# Destination Brand Survey Results Cont'd

## Top Descriptive Destination Statements of the NC I-95 Corridor (mean rating based on a 5-point scale)

Statement	Visitors	Non-Visitors
The NC I-95 Corridor is protective of its natural landscape and wildlife	3.73	3.79
The area offers affordable accommodation choices	3.75	3.60
The area offers a good variety of accommodation choices	3.71	3.65
The area offers plenty of opportunities for parks/outdoor recreation	3.69	3.68
The destination is affordable	3.80	3.49

# Destination Brand Survey Results Cont'd

## Key Destination Images/Emotional Benefits

Visitors (N=249)	Non-Visitors (N=112)
Friendly	Friendly
Relaxing/restful/rejuvenating	Relaxing/restful/rejuvenating
Welcoming/Warm	Welcoming/Warm
Peaceful	Historical
Good	Peaceful
Homey feeling	Southern Feeling/Hospitality
Laid back	Hospitable
Rural	Laid back
Serene	Safe

# Destination Brand Survey Results Cont'd

## Major Community/Attraction Satisfaction Level (mean rating based on a 5-point scale)

Community Attraction	Visitors
Airborne & Special Operations Museum	4.30
Bentonville Battlefield State Historic Site	4.15
General William C. Lee Airborne Museum	4.13
Historic Halifax	4.11
Lumber River State Park	4.06
Fort Bragg Military Base	3.99
SE North Carolina Farmers Market	3.98
Cape Fear River Recreational Area	3.98

# Destination Brand Survey Results Cont'd

## Major Community/Attraction Satisfaction Level (mean rating based on a 5-point scale)

Community Attraction	Visitors
SE North Carolina Farmers Market	3.98
Averasboro Civil War Battlefield and Museum	3.92
Carolina Premium Outlets	3.92
Country Doctor Museum	3.85
Roanoke Canal Museum and Trail	3.76
Ava Gardner Museum	3.71
Rocky Mount Sports Complex	3.68
Jordon Soccer Complex	3.63

# Destination Brand Survey Results Cont'd

## Major Community/Attraction Satisfaction Level (mean rating based on a 5-point scale)

Community Attraction	Visitors
Carolina Crossroads/Randy Parton Theatre	3.55
Wilson Antique District	3.54
Whirligigs/Windmill Farm	3.50
Robeson Planetarium	3.46
Boykin Cultural Center/Theater of the American South	3.21
Imperial Centre for Arts and Sciences	3.00



# Destination Brand Survey Results Cont'd

## Unique/Distinctive Tourist Attractions Identified Along NC I-95 Corridor (% of respondents)

Unique Attractions	Visitors (N=178)	Non-Visitors (N=49)
Outlet Malls/Shopping	33.7	10.2
Fort Bragg	32.6	12.2
Ava Gardner Museum	9.6	4.1
Civil War Sites	9.0	10.2
Restaurants/Dining	7.3	10.2
South of the Border	7.3	12.2

# Destination Brand Survey Results Cont'd

## Unique/Distinctive Tourist Attractions Identified Along NC I-95 Corridor (% of respondents)

Unique Attractions	Visitors (N=178)	Non-Visitors (N=49)
Golf/Golf Courses	6.7	18.4
Bentonville Battlefield Site	6.2	6.1
Historic Halifax	3.4	0.0
Museums	3.4	4.1
Antique Shopping	2.8	2.0
Rest stops	2.8	0.0

# North Carolina I-95 Destination Corridor

## Visitor/Non-Visitor Brand Research Results



**THANK YOU**