

**Outer Banks Visitors
Bureau**

**National Awareness
Study**



Strategic
Marketing &
Research, Inc.

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EXECUTIVE SUMMARY

- This research was conducted among a national sample of targeted respondents -- defined as households with annual incomes of at least \$50,000. It also compares results between the Outer Banks' traditional markets, emerging markets, and the rest of the United States. **The results of this survey serve as a benchmark for future marketing and public relations endeavors.**
- **As compared to its key competitors, existing levels of awareness for the Outer Banks is reasonable.** About 55% of the respondents have heard of the area as a vacation destination; 30% know it is in North Carolina; and 25% say they are familiar with the area.
- **For the competing destination with the highest levels of awareness, 91% indicate name awareness; 87% can correctly name the state; and 49% claim familiarity with the area.**
- **In considering the Outer Banks' goal of generating 80% awareness among its target audience, it is clear that generating lofty levels of name awareness is possible and that this goal is reasonable.** At the same time, it is quite difficult to generate high levels of familiarity. The 80% goal should be set based on name awareness, with additional goals relating to familiarity. Reasonable goals might be 60% that can name the state and 30% that are familiar.
- **In fact, in the Traditional Markets, name awareness has exceeded 80% (83%),** although this drops to 53% in the Emerging Markets and 46% in other parts of the United States.
- **The existing image of the Outer Banks revolves around beaches and the ocean.** While some people think about other things, such as fishing, these are much less prevalent. These findings reinforce earlier research and highlight the importance of protecting and promoting the area's beaches.
- **The respondents expressed some interest in the Anniversary of the First Flight, although interest in this event is weaker than it is for other activities and attractions.** Of course, this is the benchmark measure and interest should escalate.
- **Traditional and Emerging markets seem most likely to respond favorably to promotion of the Anniversary of the First Flight.** While their level of interest is not significantly higher, they are more aware of the Outer Banks. As such, they are more likely to visit the area.

BACKGROUND & OBJECTIVES

The Outer Banks is a popular vacation destination, being home to Kitty Hawk, the site of Orville and Wilbur Wright's first flight. The area, celebrating the 100th Anniversary of the First Flight, will use this occasion to further promote awareness and interest in visitation. The goal is to generate 80% awareness of the area among the target population.

In pursuit of this goal, the key considerations are current levels of awareness and levels of interest in the Anniversary of the First Flight. Making a determination of these measures can guide the effort needed to reach the objective of 80% awareness. Additionally, determining comparative measures of awareness for other destinations will help to clarify the reasonableness of this goal and provide a competitive context for evaluating current performance. To assist in this effort, it is also beneficial to consider other destinations that have achieved high levels of awareness to assess the manner in which they have done so.

Finally, this initial research serves as a benchmark measure for future promotional efforts. As the Outer Banks Visitors Bureau implements marketing, advertising, and public relations efforts, future measures of awareness will provide feedback relative to the Bureau's effectiveness.

The specific informational objectives of this research include the following:

- **Determine the level of awareness** of the Outer Banks among the targeted demographic;
- **Compare the level of awareness for the Outer Banks with that of key competitors** to provide a competitive context for evaluation;
- **Assess both general awareness and the level of familiarity** with the destination;
- **Gather information on key imagery** associated with the Outer Banks;
- **Explore the existing level of interest in participating in the First Flight Anniversary**;
- **Assess differences in awareness between traditional markets, emerging markets, and other areas**; and
- **Provide a baseline measure to be used in tracking** the Bureau's progress over time.

METHODOLOGY

The most effective approach to making a meaningful national assessment of awareness is via a telephone survey. In this case, *1005 interviews were conducted* from the call center at Strategic Marketing & Research, Inc. (SMARI), in Indianapolis, Indiana. The interviews were conducted during evening and weekend hours to ensure representative participation.

Among the 1005 interviews, three distinct quota groups were identified and surveyed -- traditional markets, emerging markets, and *other*. These designations referred to groups of states that represent traditional markets for the Outer Banks, emerging markets, and then the rest of the country. Only households with average incomes of \$50,000 or more were surveyed. The following definitions and quotas were used:

Survey Definitions

Traditional Markets	Emerging Markets	Other	Other	Other
District of Columbia	Alabama	Arizona	Massachusetts	Oklahoma
Maryland	Florida	Arkansas	Michigan	Oregon
New Jersey	Georgia	California	Minnesota	Rhode Island
North Carolina	Illinois	Colorado	Mississippi	South Dakota
Ohio	Indiana	Connecticut	Missouri	Texas
Pennsylvania	Kentucky	Delaware	Montana	Utah
Virginia	New York	Idaho	Nebraska	Vermont
West Virginia	South Carolina	Iowa	Nevada	Washington
	Tennessee	Kansas	New Hampshire	Wisconsin
		Louisiana	New Mexico	Wyoming
		Maine	North Dakota	

The survey measured basic awareness of the destinations as well as level of familiarity with the Outer Banks and other key destinations. Other questions in the survey related to the image of the area, interest in visiting the area, and respondent demographics. A copy of the survey instrument is included in the Appendix.

Upon completion of the data collection effort, the data were coded and prepared for analysis. The data was weighted to represent the national population. Verbatim comments from the image question were coded and the respondents' actual answers are included in the Appendix.

The following report summarizes the key findings from this research effort.

AWARENESS & FAMILIARITY

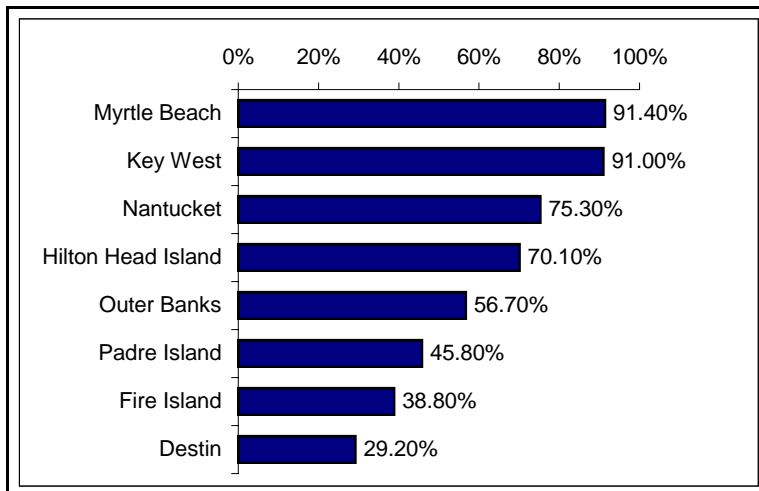
A challenge for any destination is generating meaningful public awareness. Moreover, defining “meaningful” awareness can be difficult. In many cases, people hear about a destination but actually know very little of it. The first step in generating meaningful awareness is creating name recognition. Nonetheless, assessing the depth of awareness and overall familiarity with the destination is crucial as well.

In this research, three measures of awareness and familiarity were employed. First, name recognition was tested by asking the respondents if they had heard of the area as a travel destination. Then, they were asked to indicate the home state of each destination mentioned. Their ability to link the area with the state (resultant data) will be used as the awareness measure. Finally, for each area heard of by the respondent, s/he was asked to indicate whether they were *very*, *somewhat* or *not familiar* with the destination. The following text reviews the findings and addresses how the Outer Banks fared in each quarter.

The initial measure of awareness is *name recognition*. A number of competitive destinations were included in the survey to provide a context for evaluating the results. These destinations were chosen as potential options that travelers might think about when considering the Outer Banks.

Myrtle Beach and Key West earned the highest name recognition, topping 90%. Nantucket and Hilton Head Island also earned relatively high name recognition. Name recognition for the Outer Banks falls toward the middle, as over half the respondents indicated hearing of this area. The goal of generating 80% name awareness seems reachable, although the Outer Banks must *touch* an additional 23% of its target population.

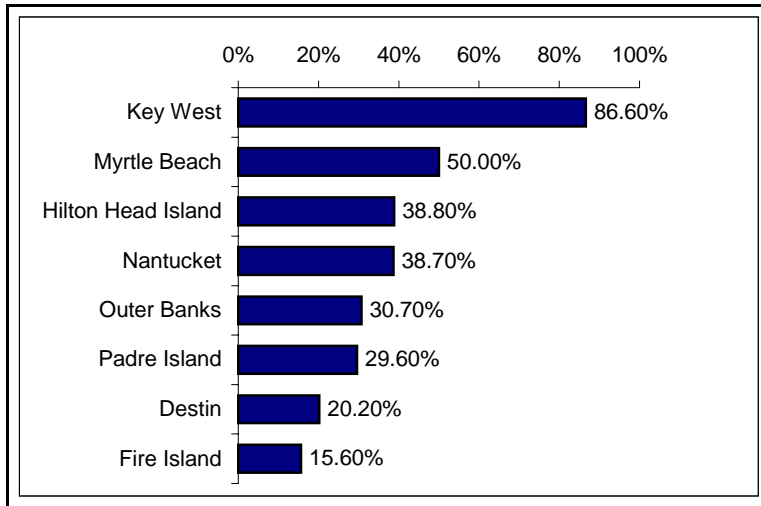
% Having Heard of Destination



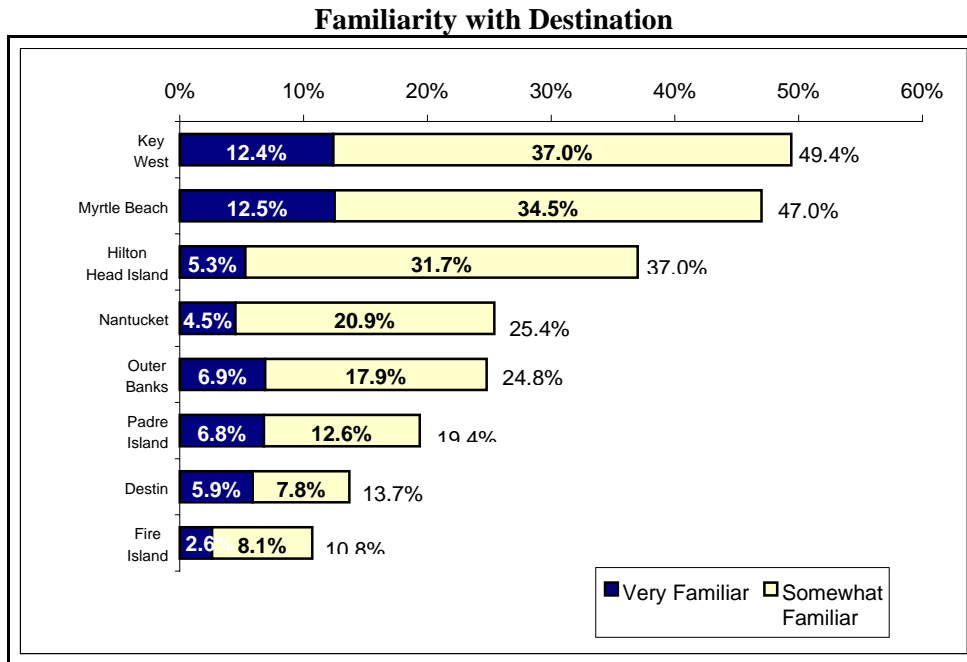
As noted, while name recognition is useful, people will ultimately not travel to a destination without first having information about what it offers to visitors. For this research, respondents were asked to indicate the home state of each area. Those who had heard of the area and could correctly name its home state were considered *familiar* with the area.

When considering measures of familiarity, we see that Key West far out-performed its competitors, as almost 90% of the national survey population had heard of Key West and knew that its home state is Florida. By comparison, only one-half of the respondents had heard of Myrtle Beach and could name South Carolina as its home state. Approximately 30% had heard of the Outer Banks and could place it in North Carolina. This means that about one-half the respondents had heard of the area. Another 9% thought it was in South Carolina, 29% could not name the home state, and the remaining 8% guessed incorrectly. These findings suggest that while many of these destinations have generated name awareness, the public's knowledge of the areas is relatively low.

**% Having Heard of Destination
and Correctly Naming Its Home State**



Finally, the respondents who had heard of a destination were asked to indicate how familiar they were with the area. Among all the measures, this is the most conservative and probably the *most meaningful*. People who claim familiarity have more knowledge and awareness of the destination.



Predictably, awareness and familiarity varies by location. Familiarity is strongest in the Outer Banks traditional markets and weakest in the markets it has not penetrated. In fact, in the traditional markets, the Outer Banks has almost reached its 80% goal, at least relative to name awareness. The emerging markets also indicate relatively high levels of awareness, though familiarity is weaker. The differences between the markets provide insight into both *potential* levels of awareness and the difficulties that will be encountered while attempting to generate awareness in new markets.

Market Awareness & Familiarity

	Traditional Markets	Emerging Markets	Other Markets
Heard of	82.8%	52.9%	45.8%
Familiar	61.4%	35.8%	32.6%
Very familiar	24.4%	9.3%	3.3%

Clearly, generating high levels of name awareness is possible and achieving over 80% name awareness is reasonable. At the same time, it is difficult to generate high levels of familiarity. Even with the most familiar destinations, only about one-half the respondents indicated meaningful levels of familiarity. The Outer Banks Visitors Bureau should consider these findings in finalizing its awareness and familiarity goals.

IMAGE & INTEREST

While generating familiarity with the Outer Banks is difficult, creating the right imagery for the area is also challenging. The goal is to create familiarity that focuses on the positive aspects of the area and to communicate the desirability of the area. While the Bureau strives to boost familiarity with the Outer Banks, it can benefit from determining the area's imagery and to work toward communicating a desirable image.

When the respondents who claimed familiarity with the Outer Banks were asked to identify words that came to mind when thinking about the area, the words *beaches* and *ocean* were mentioned most frequently. The area is also envisioned as being *quiet*. Other images included fishing, the Wright brothers, and lighthouses. On a less positive note, some respondents mentioned the word *hurricane*. Few people mentioned any areas included in the Outer Banks, such as Kitty Hawk, Duck, and Hatteras.

Imagery of the Outer Banks

Beaches	27.5%
Ocean	12.7%
Quiet	11.0%
Fishing	9.1%
Wright Brothers	5.3%
Hurricanes	3.8%
Lighthouses	2.6%
Miscellaneous	12.7%

The respondents were also asked to react to several descriptions of the area and to indicate which one they most associated with the Outer Banks. Again, "beaches" topped the list of overwhelming imagery, while many respondents mentioned fishing.

Words Describing the Outer Banks

Beaches	67.4%
Fishing	21.0%
Home of the First Flight	8.5%
Lost Colony	3.2%

The imagery of the Outer Banks changes only slightly by market area, although *emerging market* respondents were more focused on the beaches. Those with higher levels of awareness mentioned the Home of the First Flight. These findings suggest that the emerging market audience may be more receptive to promotions about the First Flight Anniversary.

Imagery of Outer Banks - By Market

Imagery	Traditional Markets	Emerging Markets	Other Markets
Beaches	66.7%	70.5%	66.7%
Fishing	20.6%	12.4%	26.7%
Home of the First Flight	9.3%	11.9%	5.0%
Lost Colony	3.3%	5.3%	1.7%

As the Outer Banks begins to promote the 100th Anniversary of Flight, an assessment of existing levels of interest in this attraction is valuable. Of course, it is likely that interest will increase as the event is promoted. This assessment merely provides a benchmark against which to track the Bureau's progress and the effectiveness of its efforts. As a way to evaluate the level of interest in this particular event, the respondents were queried about several other events and attractions.

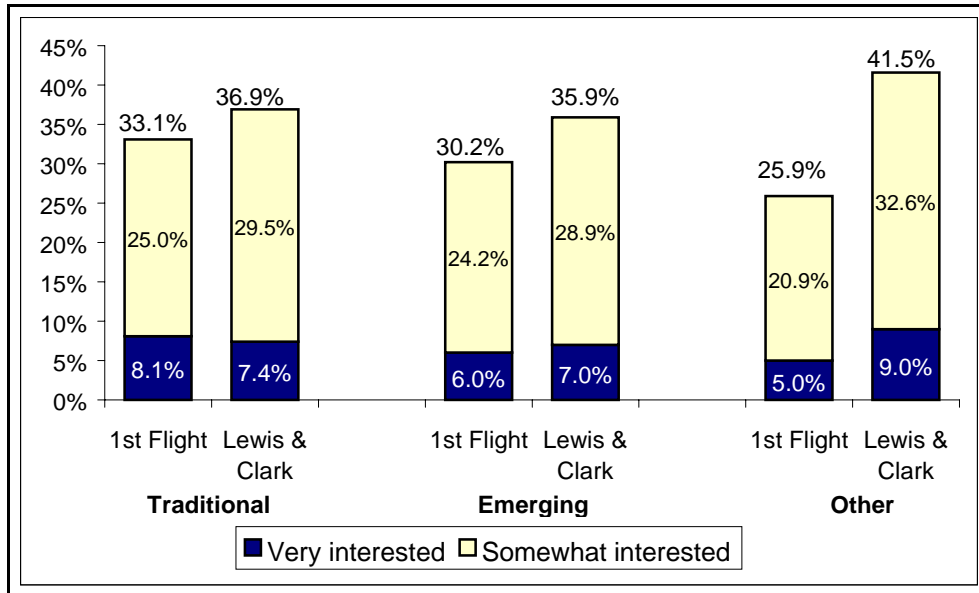
The event that generated the highest level of interest was Disney's 100 Years of Magic -- not an especially surprising result given that Disney events traditionally generate robust attention. Ground Zero is also capturing public interest. While the Anniversary of Flight generated the lowest level of interest, it is good to remember that this event has received the weakest promotion.

Level of Interest in Select Events

Level of Interest	Anniv. Flight	Lewis & Clark	Mt. Vernon	Ground 0	Disney 100
Very Interested	6.0%	8.1%	16.1%	24.9%	33.4%
Somewhat Interested	22.7%	31.0%	36.0%	28.7%	29.4%
Total	28.7%	39.0%	52.1%	53.6%	62.7%

While the respondents in the *emerging* markets were more aware of the Anniversary of the First Flight, their interest level was no higher. Interest, overall, was relatively equal regardless of geographic area. The traditional and emerging markets will probably be more receptive given their stronger awareness of the Outer Banks as a vacation destination.

Interest - By Market Area



APPENDIX

QUESTIONNAIRE

Outer Banks Visitors Bureau
National Awareness Research Questionnaire
Final – May 29, 2002
Job #: 947103

Hello, I'm _____ from Strategic Research. Today/Tonight we are interviewing people concerning their travel and vacation choices, and I would like to include your opinions.

▪ S1. First who in your household is primarily responsible for making decisions concerning travel destinations?

- 1...SELF
- 2...SELF/JOINT
- 3...SPOUSE/OTHER (ASK TO SPEAK TO THEM)

1. Which of the following places have you heard of as a travel destination?

- 1...Hilton Head Island
- 2...The Outer Banks
- 3...Myrtle Beach
- 4...Destin
- 5...Key West
- 6...Nantucket
- 7...Fire Island
- 8...Padre Island

FOR EACH ONE MENTIONED IN Q1

2. What state is [INSERT NAME] located in? DO NOT READ LIST

- 1.....NORTH CAROLINA
- 2.....SOUTH CAROLINA
- 3.....DELAWARE
- 4.....NEW YORK
- 5.....TEXAS
- 6.....MASSACHUSETTS
- 7.....OTHER, SPECIFY _____
- 8.....DON'T KNOW

IF MENTIONED IN Q1 ASK Q 3, OTHERWISE SKIP TO Q6

3. How familiar are you with [INSERT NAME]? Would you say...

- 1.....Very familiar
- 2.....Somewhat familiar
- 3.....Not at all familiar

IF FAMILIAR WITH OUTER BANKS ASK Q 4 AND Q5

4. What words come to mind when you think of the Outer Banks?

5. Which of the following activities do you *most* associate with the Outer Banks...
ONLY ALLOW ONE SELECTION

- 1.....Beaches
- 2.....Fishing
- 3.....Home of the First Flight
- 4.....Lost Colony

6. When you travel on a leisure trip, are you aware that in many destinations you can rent a house or condominium, rather than stay in a hotel or motel?

- 1.....Yes
- 2.....No

7. How likely would you be to consider renting a house or condominium rather than staying in another type of accommodation?

- 1.....Very likely
- 2.....Somewhat likely
- 3.....Not likely

8. How interested would you be in visiting each of the following?

- a. The 100th Anniversary Celebration of the First Flight of Orville and Wilbur Wright
 - b. Celebration of the Lewis & Clark Expedition
 - c. Mount Vernon, home of the Nation's First President
 - d. Ground Zero in New York City
 - e. Disney's 100 Years of Magic
- 1.....Very interested
 - 2.....Somewhat interested
 - 3.....Not interested

These last few questions are for classification purposes only so that we can group your responses with others that we have interviewed.

9. Are you single or not?

- 1...Single
- 2...Not single
- 3...REFUSED

10. How many adults live in your household?

RECORD NUMBER _____

11. How many children under the age of 18 are currently living in your household?

RECORD NUMBER _____

12. Which of the following best represents the last grade of school you completed?

- 1...Less than high school
- 2...High school
- 3...Some college/technical school
- 4...College graduate
- 5...Post graduate
- 6...REFUSED

13. Which of the following categories best represents the total annual income for your household before taxes?

- 1...\$50,000 but less than \$75,000
- 2...\$75,000 but less than \$100,000
- 3...\$100,000 but less than \$125,000
- 4...\$125,000 but less than \$150,000
- 5...\$150,000 or more
- 6...REFUSED

14. What is your age?

RECORD NUMBER _____

THANK RESPONDENT

RECORD GENDER:

- 1...Male
- 2...Female

PHONE NUMBER _____

INTERVIEWER NAME _____

CUSID _____

DATE OF INTERVIEW _____

- DESOLATE
- DIVERSITY
- DON'T KNOW
- DUNES
- DUNES
- FAMILY
- FAMILY
- FAMILY
- FAR AWAY
- FAR AWAY PLACE
- FAVORITE PLACE
- FERRY AND THE WATER
- FISHING
- FISHING
- FISHING
- FISHING
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- FISHING
- FISHING
- FISHING
- FISHING
- FISHING & THE WRIGHT BROTHERS
- FISHING IS EXCELLENT
- FLIGHT, LIGHTHOUSE, TAI RESTAURANTS
- FLOOD
- FRIED CRAB SANDWICHES
- FRIENDLY PEOPLE
- GOLF
- GOOD BEACHES
- GOOD GETAWAY
- GOODTIME

- GREAT
- GREAT BEACHES
- GROWING VERY MUCH SO
- HANG GLIDING
- HARD TO GET TO
- HARD TO GET TO
- HATTERAS
- HISTORY
- HISTORY
- HOT
- HOT
- HOUSE RENTALS
- HURRICANE
- HURRICANES
- HURRICANES
- HURRICANES
- HURRICANES
- HURRICANES
- HURRICANES
- HURRICANES, WINDY, SAND
- ISLANDS
- ISLANDS
- ISOLATION
- ITS NICE
- JELLY FISH
- JOCKEY'S RIDGE
- JUST RELAXING
- KEEPING IT NATURAL
- KEEPING THE COMMERCIALISM DOWN
- KIND OF LIKE BEAUTIFUL
- KITTY HAWK
- LAIDBACK
- LIGHTHOUSES
- LIGHTHOUSE
- LIGHTHOUSE
- LIGHTHOUSES
- LIGHTHOUSES
- LOBSTER

- LONG WAY AWAY
- LOTS OF SANDS
- LOW COUNTRY
- MARSH BIRDS
- MOM AND DAD
- MORE NATURAL
- MOSQUITOES
- MOUNTAINS
- MOUNTAINS
- MOUNTAINS...GREAT PLACE TO GO
- NATURAL SCENERY
- ND SURF
- NICE
- NICE FAMILY PLACE BUT GETTING MORE CROWDED
- NICE PLACE
- NICE SURF
- NONCOMMERCIAL
- NONE
- NORTH CAROLINA
- NORTH CAROLINA
- NORTH CAROLINA FIRST PLANE
- NOT GOING IN THE SUMMER
- NOT IMPRESSIVE
- NOTHING
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN
- OCEAN AND BEACH.
- OCEAN FLAT GETTING TO BE A RATHER NICE RESORT
COMMUNITY VERY QUIET & LOW KEY & SOUNDS REAL NICE
- OCEANS

- OFF THE COAST OF THE UNITED STATES
- PEACEFUL
- PEACEFUL
- PEACEFULNESS
- PEACEFUL
- PENINSULA
- PICTURESQUE BEACH
- PIRATES
- PLAY THE LOST COLONY
- PLEASANT
- PLENTY OF WATER
- PONIES
- POPULAR
- PRETTY
- PRIVATE
- QUIET
- QUIET
- QUITE
- QUITE
- RAIN
- REALLY GOOD TOURIST PLACE
- RELAX
- RELAXATION, CALM
- RELAXED
- RELAXING
- RELAXING
- RELAXING
- RELAXING, FAMILY ORIENTED
- REMOTE
- REMOTE
- REMOTE
- RESORT
- RESORT
- RESORTS
- RESTAURANTS & FISHING
- WRIGHT BROTHERS
- WRIGHT BROTHERS - AIRPLANES
- ROCKS

- RUGGED COASTLINE
- RUSTIC VERY PLACE THAT PEOPLE WOULD BE VERY RELAXED & ENJOY A GREAT DEAL
- SAND
- SAND
- SAND
- SAND
- SAND
- SAND
- SAND
- SAND
- SAND BAR
- SAND DUNES
- SAND DUNES
- SAND DUNES
- SAND DUNES, KITTY HAWK
- SAND...PEACE OF MIND
- SANDY
- SANDYGOOD CRABBING.....WRIGHT BROTHERS
- SCUBA DIVING
- SEAFOOD
- SEAFOOD
- SEASIDE
- SECLUDED
- SHE THINKS OF AUSTRALIA
- SHIP CRASHES
- SHIPPING WRECKS
- SHORE
- SOLITUDE PEACE
- SOLITUDE, DESOLATE FISHING
- SOME SOLITUDE
- STORMS
- SUMMER, BEACH
- SUN
- SUN
- SUN BEACH
- SUN SHINE
- SUNNY

- SUNNY BEACHES
- SURFING
- SWIMMING
- TEENAGERS
- THE BEACH....PEACE AND QUIET
- THE BEAUTY OF THE SHORE
- THE INTER-COSTAL WATERWAY
- THE MOVIE MADE ABOUT THE OUTER BANKS
- THE OCEAN
- THE WILD HORSES
- THE WRIGHT BROTHERS
- THE WRIGHT BROTHERS
- TINA
- TOBACCO
- TOURIST
- TRAFFIC
- UNDEVELOPED
- VACATION
- VACATION
- VACATION
- VACATION
- VACATIONS
- VERY POOR PEOPLE
- VERY NICE
- VERY NICE
- VERY RELAXING
- VIRGINIA DARE
- WARMTH
- WARMTH ...CLEAR WATER ...SAND
- WATER
- WATER
- WATER
- WATER
- WATER
- WATER
- WATER
- WATER
- WATER
- WATER

- WATER
- WATER, FISHING, AND BOATING.
- WAVES
- WEATHER IN THE 80'S
- WILBUR WRIGHT
- WIND
- WIND
- WIND
- WIND SWEPT
- WISH SHE COULD LIVE THERE
- WRIGHT BROS.
- WRIGHT BROS.
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- WRIGHT BROTHERS
- YEARLY