

A 10-Year Master Plan
Growing the Visitor Economy
In Salisbury-Rowan County, North Carolina



Completion & Connection

Strategic Collaborative Team

Developed By: TMO – Strategic Services – Appalachian State

A Product For: The Salisbury Tourism & Cultural Development Commission

The Rowan County Tourism Development Authority

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Table of Contents

Executive Summary 1

- A. Salisbury-Rowan County Assets
Align with Visitor Interests
- B. The Tourism Industry is a Good Investment
- C. Completion and Connection
- D. Flagships and Collections
- E. Phased Implementation
- F. Summary

Industry Assessment 5

- A. The Resilience of the American Visitor
- B. Analysis of Visitor Data
 - a. What Are They Thinking?
 - b. How Do They Decide?
 - c. What Do They Want?
 - d. What Does it Take?

Situation Assessment 9

- A. Visitor Research Data Analysis
- B. Visitor Assets
- C. Historical Significance
- D. The Creative Economy
- E. Light Adventure & Agri-Tourism
 - a. Light Adventure
 - b. Agri-Tourism
- F. Events
- G. Source of Business & Expanding Expenditures
 - a. Extending Day Visits to Overnight
 - b. Increasing Frequency of Visit
 - c. Expanding Length-of-Stay
 - d. Increasing Size-of-Party
- H. Competitive Frame
 - a. Downtown

- b. Light Adventure & Agri-Tourism
- c. Historical Sites
- d. Hiking and Biking
 - 1. Bike Friendly Trails
 - 2. Multi-Use Trails
- e. Organization
- I. Motivating Visitors:
The Buying Incentives

Key Issues 23

- A. Focus
- B. Connection
- C. Organization
- D. Staffing
- E. Outdoor Opportunity
- F. Marketing
- G. Drag
- H. Starving Artists
- I. Agrarian Definition
- J. Money Moves On
- K. Sense of Place

Strategies and Tactics 27

- A. Engage- The Visitor
- B. Complete- The Destination
- C. Connect- The Journey
- D. Destination Marketing

Implementation Plan 33

- A. Years 1-3: Asset Development**
 - 1. Solidify A Lasting Administrative Structure
 - 1A. Designate the CVB as a 501 (c)(6)
 - 1B. Staff and Structure for Implementation

- 1C. Set Up Visitor Business Development Grants
- 1D. Refine the Salisbury-Rowan County Brand
- 1E. Shift to Digital Visitor Centers
- 1F. Visitor Marketing
- 1G. Create Marketing Strategy for the Arts

- 2. Establish Sustainable Partnerships
 - 2A. Formalize Strategic Partnerships
- 3. Cultivate Business Economy and the Business Traveler
 - 3A. Quality of Life and Economic Development: The Creative Economy
 - 3B. Focus Support for Accommodations
 - 3C. Business and Community Orientation
 - 3D. Train Tourism-Related Businesses
 - 3E. Promote Commercial Redevelopment
- 4. Establish 2 Destination Flagships
 - 4A. Downtown Salisbury Flagship
 - 4B. Agri-Scenic Outdoor Flagship
- 5. Assemble 2 Collections
 - 5A. Rail
 - 5B. Light Adventure

B. Year 3-5: Infrastructure Improvement 54

- 1. Make Family Sports Facilities The 3rd Flagship
- 2. Bike Friendly Community
- 3. Designate and Develop Gateways
- 4. "Our Towns"
 - 4A. Develop and Promote Rowan County Communities as Destinations
- 5. Heritage Connections
- 6. Connect the Dots
 - 6A. Scenic Byways
 - 6B. Facilitate Winery Tours
 - 6C. Local Cuisine/Wineries
 - 6D. Town-Gown Connection
 - 6E. Rail to the Mountains
- 7. Continuation

C. Years 5-10: Structural Development 59

- 1. Destination Marketing, Management and Development
- 2. Downtown Flagship Expansion
- 3. Group and Conference Connection
- 4. Business and Product Development
- 5. Our Towns Expansion
- 6. Dedication to the Creative Economy
- 7. The Land and Light Adventure

The Road Ahead 63

- A. Strategic Implementation Board
- B. Time Frame
- C. Conclusion

Appendix 65



Executive Summary

Completion & Connection, a Ten-Year Tourism Industry Master Plan was commissioned by the Rowan County Tourism Development Authority (RCTDA) and the Salisbury Tourism Development Authority, doing business as (DBA). Salisbury Tourism and Cultural Development Commission (STCDC). The purpose of developing such a plan is to guide destination marketing and destination development in Salisbury-Rowan County, North Carolina. Collectively the RCTDA and the STCDC carryout their missions and tasks through their operational arm the Salisbury-Rowan County Convention and Visitors Bureau (CVB).

The primary goal of Completion & Connection is to double the economic impact of tourism in Rowan County, from \$124 million to \$250 million, by 2023. The plan provides perspective, strategy, initiatives and a timetable for achieving this objective. The first five months, July 1st, 2012 through December 31st, 2012, will address administrative and structural changes as defined later in Completion & Connection. The Ten-Year time frame will begin on January 1st, 2013 and be completed by January 1st, 2023.

- Economic impact of tourism in Rowan County doubled in the 15 years of 1995 – 2010 from \$66 MM to \$124 MM
- The objective is to double it again in 10 years (2013 – 2023) from \$124 MM to \$250 MM

The findings of Completion & Connection's process indicate that the objective is feasible based on visitor assets, trends and experience. The framework and implementation spelled out in the plan are designed to meet or exceed this objective.

Although the core objective is to double the economic impact in ten years, there are many other ancillary benefits that come from organizing and growing the visitor segment of the economy. Those benefits include, but are not limited to employment, higher quality of life, growth in the local tax base and overall economic development.

Several studies were made in connection with the Ten-Year Master Plan. And the ability of the plan to see ahead clearly owes much to plans and studies that were conducted previously here.

These plans and studies included:

- 40 Executive Interviews with business and community leaders
- 5 Guided Group Discussions with visitor industry constituents
- Statistical, quantitative research among three different samples
- Face-to-Face "intercept" interviews with visitors (387) at hotels, attractions and events throughout Rowan County
- Online questionnaires with visitors and enquirers (445)
- Online survey with non-visitors ("cold sample" – 489)

As a research-based plan, these 1321 completed questionnaires constituted an unusually reliable sample size, diversified for perspective.

Completion & Connection is designed to be as clear and handy as possible, and still fulfill the need to be deep and comprehensive. The format and the order with which factors are addressed are designed to help make implementation feasible.

Completion & Connection starts with the visitor, who is ultimately the customer. Profiling the visitors (prospects) who are the most viable for Salisbury-Rowan County allows for collected information to guide an action-oriented perspective of the visitor's role in economic development. The relevance of the destination's assets – current and yet to be developed – becomes clear in relation to the current visitors and prospective visitors. Their priorities and their interests are what make the difference between assets that are appealing to residents, and those that attract visitors and generate an economic return to the destination.

A. Salisbury-Rowan County Assets Align with Visitor Interests

The research findings of Completion & Connection confirm, prioritize, and detail the strengths and weaknesses that were identified during the 2007 and 2010 Salisbury –Rowan Convention and Visitor Bureau planning retreats.

Strengths: Location, history, cultural arts and dining

Weaknesses: Diversity, Internal marketing

Research reveals that travelers to the region want experiences from a visit that closely match the assets that currently exist in Salisbury-Rowan County.



Two different research samples, designed to give perspective to each other, rated and ranked the following among their top travel motivations:

- Accommodating, Friendly People
- Arts & Cultural Events
- Outdoor Activities
- Historic Sites / Districts
- Downtown Activities

The same studies revealed strong opportunity in the following:

- Concerts / Music Events
- Hiking / Biking

Another useful research finding is that two visitor activities, which might otherwise have been considered – nightlife and auto racing – are not supported by the visitor research findings. Although visitors do not “miss” the lack of nightlife in the Salisbury-Rowan County, it is sometimes discussed as a prerequisite for recruiting meetings and convention business.

However, both visitors and meeting planners agree that Salisbury-Rowan County is not considered a substantial meeting destination based off of the 2011 master plan research and a 2009 Salisbury market analysis for a new event facility.

Completion & Connection research suggests that the type of meeting and convention business for which Salisbury-Rowan County may qualify for in the future is not motivated by availability of surrounding activities, but is driven by local demand and the geographic location of Salisbury-Rowan County.

The visitor research further conveyed that although Auto Racing is part of the region’s heritage, and major assets are nearby, the sport does not show up as an important travel motivator to Salisbury-Rowan County, in terms of sustainable visitation. Significant visitor revenue to the economy does occur from Auto Racing, but it only prompts overnight stays specific to events that occur in May and October of each year.

B. The Tourism Industry is a Good Investment

According to the North Carolina Division of Tourism, North Carolina travel is a vital industry. It is the sixth most-visited state in the United States of America, with \$17 billion in direct travel spending during 2011. In 2011, travel contributed \$545.9 million in local taxes (the majority paid by non-residents) and supported 185,500 direct jobs in North Carolina.

Rowan County plays an important role in North Carolina’s travel industry. The county is ranked 28 in travel impact among North Carolina’s 100 counties and more than 1,180 jobs are directly attributed to travel and tourism. Travel generated a \$20.43 million payroll in 2010 and a tax savings of \$81.57 to each county resident.

Visitors provide an excellent form of economic development. Investing in visitor attractions – particularly those based on culture, heritage and natural beauty – enhance the quality of life for permanent residents in addition to attracting visitors. That quality of life tends to retain the educated young, attract knowledge-based businesses and provide the foundation for the type of overall economic development that is expected to characterize the 21st century.

C. Completion & Connection

Completion & Connection as a development strategy is based on matching existing assets to visitor interests. The plan concludes that although Salisbury-Rowan County visitor attractions do match visitor interests, those attractions each require some degree of completion to increase their competitiveness in a marketplace filled with many organizations and businesses competing for the visitor’s dollar. In addition, many existing attractions do not prompt overnight

stays individually. For these reasons, the key development strategies identified in the Master Plan focus on driving overnight visitation.

D. Flagships and Collections

To establish priorities and direction in developing Salisbury-Rowan County visitor assets, a system of Flagships and Collections is recommended. Flagships are visitor attractions that can by themselves prompt an overnight visit. Collections are sets of three or more attractions, related by theme or location, which together can prompt an overnight stay.

E. Phased Implementation

Looking at the opportunities revealed in the planning process, the particular initiatives required to achieve the objective are aligned in three phases:

Years 1 – 3: Asset & Structural Development

Years 3 – 5: Infrastructure Improvement

Years 5 – 10: Structural Development

The implementation plan describes specific initiatives to be deployed in each phase. Potential partners are named in the implementation plan, but that does not imply existing commitments, and the list of potential partners is a guide. More partners can be included as mutually beneficial opportunities are presented.

The benefits of implementing Completion & Connection will extend beyond the visitor sector of the economy and will work to support job growth, economic growth, quality of life and prosperity to all of Rowan County.

It is not possible at the outset of the plan to foresee every partner that will emerge to take part in the mutual benefits and “win-win” enterprises identified over the next ten years of the plan. The ability of the Convention and Visitors Bureau (CVB) to foster public-private partnerships, and attract private investment is vital to implementing the plan and achieving the primary objective of doubling the economic impact of the visitor economy in Rowan County by 2023.

F. Summary

Within Completion & Connection the following are identified:

1. Industry Assessment
2. Situation Assessment
3. Key Issues
4. Strategies and Tactics
5. Implementation Plan
6. Strategic Implementation Board

This is a fortunate, opportune plan. In the experience of those involved it is rare to see so many key factors for success already in place within Salisbury-Rowan County.

Completion & Connection was provided oversight and strategic guidance from a broad and comprehensive Steering Committee. Many thanks are given to the members of the Steering Committee and community leaders that participated in the analysis and research phase of Completion & Connection.

Completion & Connection Steering Committee

Kelly Alexander

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Barbara Perry

Dave Redden

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Industry Assessment



A. The Resilience of the American Visitor

Today leisure travel is seen as almost a birthright, and worldwide it grows at a consistent 3% to 6% per year, according to the World Tourism Organization. The United States is particularly opportune within this industry growth, because there are few other places where such a wide variety of scenic, cultural, natural and imaginative experiences can be had – and such distances can be spanned – without a passport.

A memorable example of the resilience of the travel impulse, and the security that is perceived in travel within the United States is this: A research study commissioned by the State of Colorado in November 2001, to determine the impact of the attacks of 9/11/01 on leisure travel, revealed that a temporary slump was due primarily to consumer uncertainty about the economic impact of 9/11, more than on fears for personal safety.

Leisure travel is a growing industry. According to the International Trade Administration, the United States is an especially stable environment for tourism industry growth and dominates a 6.4% share of world travelers. US travel still remains high, even after the economic developments of 2008.

B. Analysis of Visitor Data

a. What Are They Thinking?

Visitors increasingly seek authentic experiences when they travel, even for day trips and short getaways. Contact with history, heritage, art, culture, family tradition and the outdoors continue to rise among visitor motivations.

Accomplished destination marketers, developers, their researchers and consultants identify these four trends at work today in the mode of thinking visitors apply to their decisions and selections:

More Segmented In Their Interests

The visitor market is said to be composed of interest segments. Groups of people and patterns of preference that might in another time be called “niches” are now the norm.

Careful thinkers will wonder whether this was not always the case to a great extent, and whether today’s availability of highly segmented media – including ultimately Digital media – is not really at the bottom of this observation. In other words, maybe characteristic interests have always driven visitors and today convention and visitor bureaus are able to address them according to those interests.

It is increasingly accepted that today there is no mass “visitor” market, and that interest segments are the productive, actionable way to address the visitor. The research and software now available provide better tools to better identify visitor segments.

“Know It’s Me”

Visitor prospects expect to be addressed virtually on a personal basis. From the widespread distribution of multi-channel cable TV in the 1980’s, through the responding rise of narrowly targeted print media in the 1990’s, and then the rapid deployment of Digital media that virtually customizes the consumer’s media experience, people are today accustomed to living

in a media world of their own choosing, aligned with their tastes and attitudes.

This trend, over more than a quarter of a century, has bred a visitor prospect that responds to messages that seem to know what is preferred in advance. The implication of this trend is not that people want to be addressed by name – that capability is known to be computer-driven, and therefore not seen as evidence of authenticity.

Rather, the implication is that effective marketers communicate now with inside knowledge of the visitor’s hobby, interest, or passion. As a result, message content today demands knowledge of the subject that can mirror that of a real fan or aficionado. The prospect is implicitly checking the destination’s message for authenticity in subjects on which the destination can deliver to a visitor who is both knowledgeable and passionate.

Individualized Packages

Productive offers and incentives in today’s visitor communication are often centered on “packages,” – itineraries and experiences – that make it easy for the visitor to spend time deep in their passion for a subject.

“Package” is possibly a word to avoid, even though it’s handy, because it may tend to suggest “Deals.” Deals are a distraction from the real job. Giving a sense of exceptional value and insider advantage is important in composing a visitor itinerary or experience. It is not always necessary to discount lodging, meals or attractions to do this.

A more effective use of energy and ingenuity is to assemble experiences that respond with empathy to what the visitor knows and loves about a specific interest or activity – and perhaps move that knowledge further and drive the visitor to interact with the destination on an economic level. (Number three on a list of responses to “What did you do on your most recent travels?” in a recent research project was, “Learned something new.”)

Fickle And Self-Reliant

Few industries, if any, saw such a rapid rise in use of the Internet for purchase decisions as Tourism did in the early 2000’s. The power to evaluate wide and deep sources of information was at a visitor’s fingertips, and they were quick to take advantage of it.

This has made a destination’s prospective visitor highly self-reliant in planning their travel. Related to this autonomy is that the visitor is quick to change destinations.

It will take new techniques to cultivate the lucrative repeat visitor in an environment where local familiarity is so easy to replicate via technology. It is likely that no particular feature, asset or attraction is enough to accomplish this consistently.

Rather, it is likely that a memorable experience, impossible to duplicate elsewhere, is the ingredient that creates repeat visitors in the Digital age. Successful destinations will be those who can figuratively put themselves at the end of the famous line of dialog from the movie, Casablanca: “We’ll always have Paris.”

b. How Do They Decide?

The profound economic events of 2008 did not completely halt visitors from traveling to new and authentic destinations. In fact, many destinations had returned to levels at or near to their all-time high volumes by 2011. Studies have deemed the post 2008 visitor market as “The Era Of Consequences.”

An important piece of large-scale research entitled *A Darwinian Gale: The Recovery Consumer Marketplace in the Era of Consequences* was conducted in 2010 by a firm composed in part from the long-running national sampler, Yankelovich & Partners, and The Henley Center. A single chart from the report of that study can encapsulate the findings.

Five behavioral cornerstones are the foundation of consumer mentality that results from the economic events of 2008:

- Responsibility
- Vigilance
- Resourcefulness
- Prioritization
- Networks

The chart contrasts those with the dimensions that preceded them: the ambitious, exuberant, demonstrative, “indulgence era consumer” during the near-decade of the Bubble; the anxious, frugal, “recession consumer” in the aftermath of 2008; and the emerging “recovery consumer” returning to the sunshine,

	The Indulgence Era Consumer	The Recession Consumer	The Consequences Era Recovery Consumer
Ambition	Trading Up	Economizing	Responsibility
Sensibility	Exuberance	Anxiety	Vigilance
Mindset	Bullish	Sober	Resourceful
Passion	Accumulation	Frugality	Prioritization
Orientation	Self-expression	Self-preservation	Networks

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but with a sense of responsibility and watchfulness for the consequences of every decision.

Two of these behavioral dimensions, Prioritization and Networks are keys to unlocking the decision of this careful customer.

Branding – and the direction and content of marketing messages – must put an experience high enough on a visitor’s priority list to qualify for investment – because it is an investment now, rather than an indulgence; the visitor expects a return. The communication channels selected by the successful destination will include those that facilitate “networks,” sharing word of their satisfaction among visitors and prospects as an integral part of the marketing cycle.

c. What Do They Want?

According to the World Tourism Organization and the North Carolina Chamber of Commerce, overall trends in North America are similar to those desires and expectations of visitors to the Piedmont, thus a key strategy is to focus particularly on the findings of research conducted specifically for Completion & Connection. The quantitative, statistical study was structured to compare and contrast the interest of visitors to the region with those of visitors to Salisbury-Rowan County.

See the Completion & Connection section titled “Buying Incentives” for a complete discussion of findings about the match between visitor interests and Salisbury – Rowan County assets.

d. What Does it Take?

The vigilant, resourceful consumer of today is a tougher customer. Fortunately the means of reaching, motivating and engaging that customer are far

stronger and more articulate than they were even five years ago.

Just as the customer has gained more and more control in the marketing process, so too, the marketer has gained some unprecedented means of connecting with that customer.

Digital media platforms have literally changed the shape of marketing.

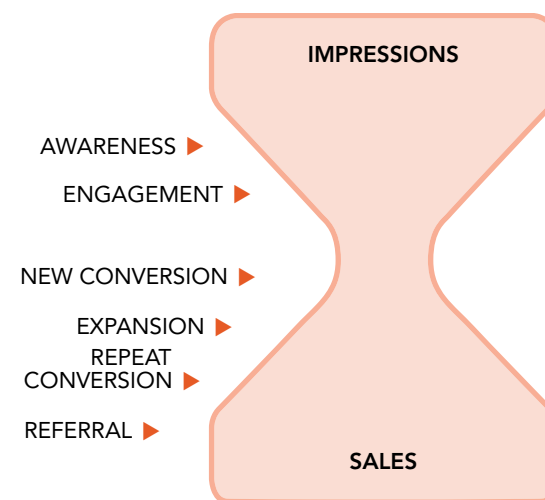
For almost a century, marketing was described in terms of a funnel – make impressions among the public at the wide top of the funnel, and watch customers dribble out the narrow bottom, after moving through stages described as attention, awareness, interest, commitment and purchase.

Today it is useful to think of the process as an hourglass.

With Digital media it is no longer necessary to pay for as many consumer impressions at the “top of the funnel,” because tourism authorities can now take an active part in converting them to buyers by engaging them in tailored communications, a kind of “digital dialog.” This leads to a higher rate of conversion and less need to fling a wide, wide net and keep repeating impressions over and over.

And after achieving purchase, marketers can now “cross-sell” far more efficiently – consider the long-established example of Amazon.com. For a destination that means tourism authorities can bring a visitor prospect’s attention to other assets that would interest the visitor, extend their plans and prolong their visits to the destination.

After a visit, Digital and Social media enable the marketer to activate what is often called “brand ambas-



sadors.” This function is not seen as a “commercial” anymore. It consists of advice from trusted friends and associates. Personal referrals and recommendations have always been more effective than commercial messages; now they have become a cornerstone of buying behavior for the post-Recession consumer.

Fortunately, Digital and Social media empower the marketer to take a more active part in this phase of the process than ever before.

Since 2006, savvy destination marketers have shifted significant funds from traditional media to digital and social media. But all appear to be looking for some guidance in how to make that shift. The Hourglass model is the basis for an excellent answer. Conventional media remains vital – to maintain awareness, freshen the pool of leads and serve as reminders of the overall capability of a destination. But digital media platforms now are the vital tools for engaging, converting and expanding visitor leads into paying customers.



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Situation Assessment



The current situation of Salisbury-Rowan County's visitor industry is an opportune one. The research and findings of Completion & Connection coincide with the strengths and weaknesses identified in analysis provided for Salisbury-Rowan County in 2007 and again in 2010. The strengths and weaknesses as identified are as follows:

Strengths:

- RCTDA Staff
- Branding
- Industry Experience
- Understanding of the Local Economic Environment
- Location
- Feeder Markets
- Diversity of Attractions
- Collaborations/Partnerships
- History
- Cultural Arts
- Transportation Access

Weaknesses:

- The Unknowns- Operating in a two Tourism Authority Model (the destination has made great strides and continues to successfully blaze new territory on cooperative partnerships)
- Economy
- Lack of Marketing Resources-compared to neighboring destinations (successful efforts have been made in Salisbury-Rowan County to increase funding for visitor marketing, the combined efforts of the tourism authorities has created the largest economic development organization in terms of funding in Rowan County)

- Diversity
- Accommodation mix
- Regional Competition
- Partnerships could easily unravel if personalities change

A. Visitor Research Data Analysis

For Completion & Connection a quantitative research study was completed with 1,321 total interviews from three primary sources; face to face intercept interviews with visitors, online questionnaires with visitors, and an online survey with prospective visitors who have never been to Salisbury-Rowan County serving as a cold sample, also called prospects or prospective visitors.

The research depicts that current visitors and prospects have many of the same underlying interests and are attracted to many of the assets Salisbury-Rowan County has to offer. Many of the key factors regarding the research findings are discussed throughout Completion & Connection in the context of how to grow and reach the viable tourism potential in the County.

From demographic information gathered, 68% of visitors are female, 69% are married, and visitors have an average of 2.85 people living in the home. This infers that the primary visitor is predominantly female, married, with a family of one to two children. Although the average age varied, 85% of visitors were between the ages of 25 and 64.

The majority of current visitors come from within a two-hour radius of Rowan County, and 55% are from within North Carolina. Of these visitors, 40.5% are coming from the Charlotte region of North Carolina, 11.3% from Greensboro, NC and 3.2% from Raleigh, NC. The most common mode of transportation to Salisbury-Rowan County is by car at an 88% majority.

The average spent on a typical day trip is \$54.63 per person, or \$172.62 for the entire traveling party. The average spent on a typical overnight trip is much higher at \$131.62 per person and \$408.76 for the entire traveling party. The average number of people in a typical trip is 3.16. The value of overnight leisure visitors is extraordinary and the potential economic impact of turning day-trippers into overnighters cannot be overstated. An overnight stay generates \$236.14 more per visit than a day visit.

Additionally, overnight guests agreed that they prefer to stay at a moderately priced or full-service hotel rather than with family and friends. With 85% of overnight stays to Salisbury-Rowan County being business related, the potential of translating day-trippers into overnighters is of extraordinary value to the destination and is a key component in increasing the economic impact of the visitor.

This research serves as baseline guide for the implementation and development of Completion & Connection. It is suggested to examine the research again in a comprehensive manner with fresh data in 2015 or 2016.

B. Visitor Assets

An important method for analyzing Salisbury-Rowan County's visitor assets is through the eyes of the people who have a big stake in the community and county as a whole. The viewpoint of this analysis in Completion & Connection comes from 40 leadership interviews, conducted with business and civic leaders during October and November 2011.

A key overall observation is that the stakeholders who were interviewed spoke of the destination's visitor assets in terms of their suitability for a leisure visitor. The fact that close to 85% of current overnight stays in Salisbury-Rowan County are from business travelers, corporate customers and transient guests, rather than leisure visitors, means that the leaders interviewed are looking to a future that is significantly different from the present reality of who the Salisbury-Rowan County "overnight guest" is.

The destination's visitor assets do attract a substantial number of visitors on an annual basis reaching totals well over 3 million visitors a year. The vast majority of the 3 million visitors a year are day-trippers from the region. The day-tripper does contribute to the visitor economy through a variety of expenditures but not on the same level as an overnight visitor. Completion & Connection works to address the conversion of a day-tripper to an overnight guest. Day trip visitation is and will remain a vital component of any economic development strategy for a local visitor economy and should not be ignored.

The situation assessment will take the perspective of fitness for succeeding in the tourism industry. What do visitors want; what does that destination have that fulfills what visitors want; and what must the destination do to compete effectively for the visitors' decision to go and to spend?

Research identified the most significant visitor assets as (assets are not listed in a ranking format):

- Our Towns (The rich nature of the Cities and Towns in Rowan County)
- Downtown Salisbury
- History and Historical Architecture (including Downtown Salisbury)
- Parks and Recreation
- Lazy 5 Ranch
- Patterson Farms
- Arts and Culture (organizations and institutions)
- Transportation Museum
- Minor League Ballpark
- Heritage
- Civil War History
- Events
- Wineries
- Higher Learning (Community College, Catawba, Livingstone, Hood Theological)
- The Land (scenic destination)

A frequently mentioned asset was the History/ Genealogy Room at the Rowan Public Library. It's a resource for family historians whose ancestors came from the Southern and Middle Atlantic colonies. The collection of information focuses on North Carolina with significant information about migration in and out of the piedmont.

Leadership interviews resulted in a focus from stakeholders centered largely on historical significance, cultural experience, light adventure/agri-tourism and events.

C. Historical Significance

Salisbury-Rowan County boasts multiple historic locations and districts, which require architectural review as a mechanism to preserve heritage. Historical significance is overwhelmingly viewed by local leadership as an advantage over competitive and surrounding destinations.

The historical components of the destination are significant and can be used as a tool to market the destination. Various efforts have been made by the community to continue investing in the historic preservation of Salisbury-Rowan County and to recruit this type of visitor to the market. An example is the 2011 Historic Preservation Master Plan that discusses improvements to local history while working with the TDA to attract new visitors.

Multiple organizations and entities in addition to a variety of community leaders and volunteers play a significant role within promoting and preserving the rich history of Salisbury-Rowan County. Some of the primary groups are:

- Rowan Museum
- Downtown Salisbury Incorporated (DSI)
- Historic Salisbury Foundation



- Historic Preservation Commission
- North Carolina Transportation Museum
- Salisbury Confederate Prison Association
- Historical Society of Southern Rowan County
- The Rowan County Historical Society
- Historic Gold Hill and Mines Foundation

D. The Creative Economy

The creative economy encompasses artists, culture, nonprofits, creative, certain technology and knowledge based businesses that produce and distribute goods and services ranging from arts and culture to digital based design platforms that all impact the economy by generating jobs, revenue and increasing quality of life. The creative economy not only supports broad based economic development for a community but also is a substantial driver of the visitor sector of the economy.

Salisbury has a long history of efforts to support the creative economy beginning in 2005 when community, civic and business leaders participated in a conference called Cultivating Creative Communities and

followed the conference with subsequent studies, plans and investments to support creative endeavors.

The creative economy greatly impacts the Salisbury-Rowan County visitor economy and in 2008 a Cultural Action Plan was completed to evaluate how the two could mutually benefit each other. Many of the aspects in the plan focused on what the visitor economy could foster and how the two could work together in a symbiotic relationship. Since then, the Rowan Arts Council has aligned itself with the Rowan County and Salisbury Tourism Development Authorities for the purpose of marketing and developing cultural facilities, assets individuals, businesses and the destination as a whole.

Salisbury has a rich arts and cultural community with several arts and cultural venues and displays of public art. This draws many local residents and day-trippers, who over time can be converted to overnight guests in an effort to more greatly contribute to overnight stays.

The immediate benefits that the arts and cultural community provide for tourism were perhaps summed-up best during one of the interviews, "I'm not sure how much impact the arts and cultural assets in Salisbury have on tourism, but the arts and cultural community has a direct effect on the way the residents feel about themselves, and the way a community feels about themselves has a direct effect on tourism." This is a fair present-day observation, in a community in which 85% of visitors are not leisure-oriented.

Longer-term, however, the potential overnight visitor benefits are significant, since arts and culture visitors stay longer, spend more and travel in larger parties than do visitors as a whole.

E. Light Adventure & Agri-Tourism

a. Light Adventure

Complimentary to the historical and cultural assets in Salisbury-Rowan County are neighboring parks and a host of recreational visitor assets located throughout the destination. Parks contribute greatly to the light adventure, or leisure activities, segment of the visitor industry. Dan Nicholas Park ranks at or near the top of North Carolina parks in terms of visitor patronage.

At present, few of these visitor parties to Salisbury-Rowan County who interact with parks are overnight guests in the destination. Parks and outdoor assets attract a significant volume of day-trippers and is a permanent physical asset that contributes to economic impact of the visitor sector of the local economy.





b. Agri-Tourism

Agri-tourism is where agriculture and tourism intersect as farms and agriculture related businesses invite the public onto their property to enjoy a “hands on” outdoor experience, discover more about farming, or spend time with the family picking produce.

Agri-tourism is one of the fastest growing segments of the travel industry and offers a huge variety of entertainment, education, relaxation, outdoor adventures and most importantly an authentic experience for the entire family. A growing segment of visitors, particularly families, seek tangible experiences with the American heritage of working the land and caring for animals. Rowan County is unusually well qualified to capitalize on this trend, based on two well-established assets, Patterson Farms and Lazy 5 Ranch.

Patterson Farms and the Lazy 5 Ranch enjoy long histories of success as family attractions. Patterson Farms in particular has served as a key locale for educational field trips, as well as leisure day-trippers.

It has successfully explored the connection between the outdoor visitor and the arts/culture or heritage visitor by cross-referring parties to multiple visitor assets in Rowan County, including but not limited to Downtown Salisbury, Transportation Museum, Lazy 5 Ranch, and Dan Nicholas Park and to a variety of events and festivals.

Lazy 5 Ranch offers unique, engagingly offbeat and unexpected encounters with animals no one would associate with the Piedmont. It serves also as an example of learning-as-you-go while developing a visitor asset.

Rowan County has three wineries: Cauble Creek, Old Stone and Morgan Ridge. Although wineries appeal to a specific type of visitor, they are by nature agriculture related businesses and have become visitor related assets. They are open to the public and create unique visitor experiences. The wineries in Salisbury-Rowan County represent a new and unique opportunity for visitors in the region. Additionally,

the visitors that are attracted to wineries are also interested in downtown, arts and culture.

Other light adventure assets include High Rock Lake, Tuckertown Lake, Yadkin River, Bull Hole in Cooleemee, Dunn’s Mountain, and the proximity to Uwharrie National Forrest. Light adventure and agri-tourism satisfies a families desire to connect to the land through an authentic experience in an outdoor setting, while still being located where cell phones work. The potential of agri-tourism and light adventure to constitute a critical mass of attraction for overnight visitors to Salisbury-Rowan County represents a key opportunity for further development.

F. Events

Events that draw residents from Rowan County and neighboring counties are especially important to the local municipalities. These events separate Rowan County from its competitors, and often serve to distinguish the individual communities.



The TDAs, DSI and other organizations do a tremendous job of creating and promoting specific events for the betterment of the community and local economy. Events such as a Day Out With Thomas, Autumn Jubilee, OctoberTour, Friday Nights Out, Farmer’s Day, Faith Fourth and a host of others add to the authentic nature of Salisbury-Rowan County.

G. Source of Business & Expanding Visitor Expenditures

Currently approximately 85% of overnight visitors to Salisbury are business-related guests. The greatest opportunity for growth – and the focus of this master plan, is to develop further the 15% leisure market in a manner that focuses on the development of assets that encourage overnight leisure stays, but not at the expense of the business visitor. Business visitors are potential leisure visitors, and in the meantime they provide the revenue required for progress.

Completion & Connection recognizes the importance of supporting the local business economy, as a growing business economy drives overnight visitation. Strategies and tactics for targeting both the leisure and business market are included in Completion & Connection.

The element of choice is the vital, and a fundamental difference between the business visitor and the leisure visitor. Business travel is often prompted by a mission, and that mission is almost always attached to a particular business location, an office, a facility, a store or a certain destination. The purpose of the business trip usually dictates the location. Within that location, the selection of accommodations, dining, entertainment and business resources are areas for selection. But the destination itself is usually a given.

Leisure travel destinations are a matter of almost pure choice. Personal and family resources, including both time and money, narrow the field somewhat, but within any given budget bracket there are a host of options.

Events and Festivals are very active and a strong component of the tourism industry in Salisbury-Rowan County. Each event provides an authentic experience and an occasion that shows visitors what Salisbury has to offer. These occasions should be viewed as opportunities to expand a visitor’s perspective of the potential to further explore a destination. The greater the exploration by a visitor in terms of locations and length of stay the greater the economic impact.

Catawba and Livingstone Colleges every year deliver families to Salisbury-Rowan County when parents

come to situate their children at school and attend a Homecoming or a graduation ceremony. Once thought to be only a few basic occasions to visit, one destination development associate was able to enumerate seven (7) sampling occasions in which a college family is exposed to the destination. These include reunions, Mother/Father-Son/Daughter weekends, athletic events, holiday transport and so forth. These tides of family involvement should be harvested for their potential to expose more of the destination and its possibilities, and thereby motivate more and longer return visits.

For many destinations getting the first-time visitor is the highest bar to reach and often times lack of awareness, geographic unfamiliarity and other factors have to be overcome.





Salisbury-Rowan County can and is considered by some as a “trade route,” as noted in leadership interviews, not only between Winston-Salem and Charlotte, but also between D.C./Virginia and Atlanta.

A theme that resonated throughout leadership interviews was “it is a good thing to be distinctive, and yet not off the beaten track.” In addition to proximity, Salisbury-Rowan County has a great sense of authenticity and sense of preservation that encompasses multiple visitor segments and markets.

a. Extending Day Visits to Overnight

Leisure visitors to Salisbury and Rowan County are abundant. Reputedly one of the best-attended publically owned parks in North Carolina is in the County and close to the City. Carolina Field Trips magazine reported in September 2010 that Dan Nicholas Park

led the state in at least one measure, school trip visitors, with 126,343. Lazy 5 Ranch was a close second with 123,846, and Patterson Farm also ranked in the top 25 with 25,874 school visitors. While schools are just one indicator and not one that entails overnight stays, the awareness, popularity and usefulness of these outdoor experiences is just one high-profile fulcrum for leveraging overnight visits to Salisbury-Rowan County.

Festivals and Events are active and successful in Salisbury and in the other towns and areas of Rowan County. Each one is a sampling experience and an occasion that offers substantially untapped overnight potential. Active, direct initiatives to extend the stay of these visitors are a key opportunity.

Downtown Salisbury visitors often are motivated by historic, art and cultural attractions in addition to events and entertainment, and so extending their stay will involve linking those attractions and occasions into a multi-faceted experience.

b. Increasing Frequency of Visit

By building awareness of the untapped variety of attractions within the destination, visitors can be brought back to see what they couldn’t pack into one trip. Increasing frequency is perhaps the most difficult with families that include children. However other appropriate segments, including the most lucrative visitor segments – the affluent couples and empty-nesters who are drawn to cultural and art attractions, outdoor experiences and cuisine – are available for more than an annual visit.

Presenting more than one “package” within a given theme, and cross selling to adjacent interests (outdoor to art for example) are active measures that can increase visit frequency among high-value visitors.

c. Expanding Length-of-Stay

The same techniques that increase frequency of visit can be implemented to extend the length of stay, especially among 50+ visitors who have increasing control over their time.

Salisbury-Rowan County through the efforts of the Tourism Authorities has already launched strategies to expand the length of stay, specifically through the destination’s interconnected kiosk program. The program incorporates sites, institutions and accommodations into a visitor service network that encourages the visitor to expand the stay.

Further efforts are required to expand the stay; efforts that embrace the ability for technology to link people with places. Marketing strategies to improve the length of stay need to speak to the interests of the visitor as it relates to multiple visitor assets. For example, visitors who identify arts and culture as a primary interest also list heritage and dining as key interests. An effective marketing effort links all three interests together into to one experience, a singular experience that in turn increases the length of a visit.

d. Increasing Size-of-Party

An area of opportunity is to increase the size of the visiting party. The attraction portfolio in Salisbury-Rowan County provides a broad range of experiences that through further marketing, public relations, and communications, will serve as viable tools in any effort to increase the size of the visiting party. An increase in party size results in an increase in total expenditures made by the visiting party. The close working relationship between Salisbury and Rowan County sites can pay particular dividends on this issue, because experiences like Patterson Farm can round-out the family appeal for parents who them-



selves would like a downtown/culture/art/ cuisine experience.

History is a subject that makes “birds of a feather flock together,” and initiatives should be developed that package subjects like First Frontier, Civil War and American Railroad for small groups of friends and aficionados.

Festivals and Events are also ideal for family and friend groups, and the organizers should be encouraged to offer advantages to parties of four or more. Cultural and Art attractions can leverage informal learning as a reason for multi-person attendance. A backstage tour, a post-curtain Q&A, a meet-the-artist talk at an exhibit opening – these are just a few examples of patterns and initiatives that should be encouraged to increase visitor party size.

Light Adventure (hiking, canoe/kayaking, biking etc.) often trends towards parties larger than a couple. This is another reason for putting them in the plans for further development in Salisbury and Rowan County.

H. Competitive Frame

Salisbury-Rowan County has the potential for competitive advantage with their downtown, light adventure, agri-tourism, historical sites, hiking and biking and organization within the City and County.

When assessing the competitive frame it is important to recognize what an acceptable substitute for visiting Salisbury-Rowan is. By aligning Salisbury-Rowan County with the key interests and priorities of an individual or family, the community becomes a desirable destination for the visitor.

a. Downtown

Downtown Greenville, South Carolina is a great benchmark to compare with Downtown Salisbury. An analysis of Salisbury’s Downtown Master Plan reveals a sense from community leaders that the Greenville, South Carolina Downtown is a model for “what we might want our Downtown to be.”

Greenville, South Carolina affords an excellent example in the region of an attractive, accommodating downtown that was redeveloped after a history of industry decline and suburban migration. Although the scale of the city and metropolitan area, and its dominance of the county, is different from that of Salisbury-Rowan County, the issues Greenville overcame – and the outcome they achieved – make it a useful navigation point for the work already under way in downtown Salisbury. The Greenville case history also contains experience worth noting for the development of other towns in Rowan County.

Some key observations and review of a few of the differences between Greenville and Salisbury include these:

- Downtown Greenville is highly linear. Most of what to do and see, and where to stay stretches out along Main Street.
- A strong selection of lodging choices has made downtown Greenville a destination within a destination.
- Greenville has more restaurants and more variety of cuisine.
- Salisbury has a strong inventory of historic buildings and a compelling narrative on the Downtown, including the sense of place



that comes from an original rail station, courthouse buildings and historic churches to name a few.

- Both downtowns have key performing arts centers and Greenville has an outdoor stage.
- Education is a key difference leveraged now by downtown Greenville. Clemson University has located “Clemson At The Falls” near the foot of Main Street, and has consolidated the graduate programs of its College of Business And Behavioral Sciences there, along with several community outreach programs, including education for entrepreneurs and small business leaders. This reflects the interaction of visitor vitality with quality of life, and its ability to attract knowledge-based businesses for further economic development.

Many of the differences were consciously developed, like the anchor hotels of Greenville. Some were inherited, like the more interesting, less linear pattern of Downtown Salisbury. Some were adapted, like the riverfront park in Greenville.

Concepts for Downtown Development:

Mary Douglas Hirsch, the Downtown Development Manager for the City of Greenville, shared the following “Lessons Learned” from the important case history of successful redevelopment there:

- Work with community partners
- Attract new economic development
- Create anchors but fill in the gaps
- Bring cultural amenities to the area
- Activate “dead” parking lots and garages (multi-use)
- Incorporate residential uses into mix

- *Provide variety of public art
- Remember details are important (benches, trash cans, signs, etc.)
- Create walkable environments
- Recruit retail users into mix
- Provide areas for outdoor dining
- Create a landmark feature
- Activate the city/area through events
- Work on connections (town/outdoor); seek trail opportunities
- Ensure healthy office market
- **Realize that the work is never done!**

* On the subject of public art, it is noticeable that the thrust in Greenville is to add unity, direction and sense of place through the selection of sculpture. There are a variety of artists, subjects and moods – from baseball’s Shoeless Joe Jackson and Revolutionary General Nathaniel Greene to the nine whimsical “Mice On Main” that gently reward visitors, young and old, who follow Main Street from head to foot, to “find the mice.” But within that variety, the use of bronze as a medium and the inclination toward representation rather than expressionism, give Greenville’s public art a direct role downtown as guides, illustrations and influences rather than as objects.

Downtown Salisbury is strategically positioned because the lead organization (Downtown Salisbury Incorporated) has embraced long range strategic planning and has advocated many of the aforementioned positions. Additionally Downtown Salisbury Inc. and partners have generated over \$100 million in investments.

From a thorough review of the Greenville case it is striking how much persistence played a key role in successes. Many ideas – including the idea for a “water feature” that got the downtown redevelopment started in 1979 – were mistaken or misdirected.

Yet with persistence toward a larger vision, the mistakes fell away and the things that work remained. Few visitors – and even very few tourism professionals – realize how long Greenville has been “at it” to develop the downtown, or how much they owe their success to persistence.

Comparing downtown Salisbury to even the middle stages of the Greenville case, it is remarkable how much more Salisbury has to work with here now than Greenville had then.

b. Light Adventure & Agri-Tourism

The challenge of focusing visitor access on outdoor activities and “light adventure” is that the assets, facilities and attractions are literally scattered. By nature, it takes land to provide these services, and so distance between them is inevitable. Possibly as a result of those distances, cooperation and synergy among outdoor assets is less common than in downtown development. So, there is no one single “destination” that provides insight for Salisbury – Rowan County’s competition for outdoor visitors in terms of best practices.

South Carolina is an example of how through marketing and strategy they have connected the visitor to their assets with a unified approach. This can be seen on the South Carolina Parks website at www.southcarolinaparks.com.

Agri-tourism correlates with light adventure because they are both uniquely connected to the land. Research data verifies the connection between agri-tourism visitors and light adventure visitors. These visitors desire an authentic experience outdoors in a fun family setting.



Agri-tourism is a combination of nature, agriculture and civilization and research shows that visitor interest in connecting with land, crops and animals is strong and longstanding. Some agri-tourism destinations report that visitors started showing up years before the farm operators' thought of themselves as an attraction.

A confusing aspect of agri-tourism is that it takes so many different forms. Rowan County has the advantage of two outstanding examples of distinctly different forms in Lazy 5 Ranch and Patterson Farm. The former centers on exotic animals in an environment that visitors can enjoy from their cars, and the latter on indigenous produce, landscaping, farm, market and tours. In effect, Rowan County has two of the navigational poles of agri-tourism already nailed down. It is hard to find better benchmarks than the two that are here.

However, although the attractions are established and successful, they are not yet strong sources of overnight visitors or diversified visitor spending. Recent research shows most visitors to Patterson Farm,

for example, to be from relatively nearby, with a prominent motivation being that of having a low-cost activity for the whole family. Linking Rowan County agri-tourism assets to other interests and attractions appears to be the key to aligning them with the goal of overnight visitors.

c. Historical Sites

Salisbury – Rowan County encompasses a variety, quantity and concentration of historic sites – from homes (some restored, some in continuous use), to public buildings, to theaters, taverns and restaurants – that is hard to exceed anywhere in the region. What it lacks in battlefields or major historical turning points is made up in the “nearness” of history that pervades the destination.

The remarkable thing about Salisbury-Rowan's competitive set in the heritage market is the absence of viable competition in nearby Charlotte. Old Salem and Bethabara Park, in Winston-Salem are examples of how adding interpretation to restoration can create a more accessible form of appeal, one that does

not rely on the visitors' own knowledge or appreciation to be attractive and rewarding.

The Salisbury Confederate Prison site is a major opportunity to expand visitor attraction, through a unique historical asset, by making the story appealing beyond Civil War “buffs.” Accessing the leisure visitor through interpretation, i.e., careful selection of stories and visual guidance is the key.

In evaluating historic assets for further development, it may be well in addition to focus on aspects of history that clearly distinguish Salisbury-Rowan County from other destinations and are aspects that connect the visitor to the destination's history.

d. Hiking and Biking

Even though Hiking and Biking are connected with “Light Adventure” the two have a broad range appeal that reaches past the adventure seeker and embraces visitor segments ranging from the sports enthusiast to the environmentally focused visitor.

The “Light Adventure” style of hiking is dealt with in the outdoor segment of the competitive frame. This kind of visitor enjoys “hiking” that has more to do with jogging shoes and t-shirts, and which takes place closer to town. For attracting visitors this “soft” hiking is worth paying attention to, because it encompasses a wider variety of visitors, including more family members and multi-generational parties, and it provides an important connection between urban landscapes, forest landscapes and rural landscapes. A case in point is the Greenway system in Salisbury. Soft hiking expands visitors' familiarity with what a destination has to offer, and also gives the visitor time to connect to the destination in a variety of environments.



Success in competitive destinations demonstrates that biking is an area of opportunity for Salisbury-Rowan County that should be considered carefully and modeled for success. The Comprehensive Bike Plan now in place is to be supported. In addition, official designation as a “Bike-Friendly City” would give a quick and widely understood stamp of endorsement to visitor prospects that Salisbury fulfills this desire and qualifies for this preference.

Biking has served and continues to serve as a generator of overnight visitors, specifically related to bicycle related sporting events. Tourism officials have been successful at establishing relationships with event organizers and have recruited events to the destination, which have resulted in substantial overnight business.

Together, hiking and biking represents an increasing opportunity for Salisbury and Rowan County in the form of “trails” and “bike paths,” to market experi-

ences that reaches a broad range of visitors, whose interests align with the destination’s products. With “Hiking/Biking” figuring high among visitor preferences, it is worthwhile to consider “killing two birds with one stone” by providing a way to enjoy them through the same infrastructure development.

Trails and bike paths have been used effectively to tie urban and rural, or town and surroundings, together in many successful destinations. In Salisbury-Rowan they could also play an important role in forging a closer “town-gown” relationship between the City and the colleges, particularly Catawba College.

1. Bike Friendly Trails

The traffic-calming effect of striving for Bike-Friendly designation can greatly enhance a city for residents as well as visitors, pedestrians as well as bicyclists. The benefits of such initiatives come to bear before official designation is achieved. Measures like

segregated bike lanes and installing municipal bike racks are low-capital investments that tell everyone something good is happening.

2. Multi-Use Trails

Greenville, SC again, offers an excellent example of using trails as an enhancement, even to its downtown redevelopment. Trails there weave connections between streetscape and countryside. In Greenville as in other cities, trails present an example of one of the most inclusive visitor initiatives – one that gets participation from every segment – and also one of those measures that becomes an icon of quality-of-life and thoughtful development in the 21st Century. With 17.5 miles of current trails in use, Greenville plans to expand them to 23+ miles. In a study of the trails’ economic impact, 85% of the shops and businesses near them report a 20% or greater increase in sales since the trails were completed. They not only add to access, but also increase the quality of time spent around nearby businesses.

Of special interest to Salisbury-Rowan County might be the fact that large sections of Greenville’s successful trails lie along unused railroad right-of-way. The Mary Black Rail Trail in Spartanburg County (SC) is another excellent example of this technique.

Currently, Salisbury-Rowan County has a History and Art Trail and a Heritage Trail in and around the Downtown along with an African-American Heritage Trail and Civil War Trail that all originate in Downtown Salisbury. Efforts should be considered to enhancing these thematic trails by incorporating a “hiking” and “biking” component to the trails.

e. Organization

Today, organization is the most nearly unique visitor asset Salisbury-Rowan County brings to the new tourism industry table. The fact that the City Tourism Authority and the County Tourism Authority are banded together in the effort is authentic and speaks volumes of the destination's focus on economic development through the visitor economy.

The partnered organization eliminates waste of effort in ways that most tourism destinations cannot match. The current organizational structure is a competitive advantage for Salisbury-Rowan County because it provides the local tourism organization a greater ability to adapt to the changing demands of the visitor market. For example, by organizing the Arts Council in the same structure as tourism, the destination has put public art funding as one of its distinctive assets under an authority that has vital interest in developing arts and culture.

Even successful visitor destinations often have to overcome fault-lines of division over turf and priority. The tendency of individual interests to struggle for self-promotion rather than the collective good is very difficult to navigate through to success. Salisbury-Rowan County has laid a strong foundation for avoiding this. The loss of energy and focus that results from such struggles has been greatly reduced, simply by doing the right things for organization at the outset. Completion & Connection's primary concern with "organization" is that at the writing of the plan the "organization" is truly built on and sustained through the strong and valuable personalities that created the partnership. The challenge: personalities change.

The importance of extending and capitalizing on this foundation, into the future, cannot be overstated. Of

additional note is the tourism leadership in Salisbury-Rowan County clearly recognizes that the "visitor" impacts the entire economy, from infrastructure to retail to dining to accommodations and the CVB has a role in supporting the entire economy. Such thinking and the willingness to allocate capital towards economic development endeavors speaks to the importance the CVB will play in the future growth of the destination.

I. Motivating Visitors: The Buying Incentives

A fundamental goal of any destination marketing and development effort is focused on motivating visitors to experience a destination. In turn destination managers must determine which buying incentives to apply on behalf of a destination in an effort to attract visitors, this exercise at time can be fraught with controversy, even though fundamentally it is based on maximum return on investment given available research and the amount of resources open for allocation.

Buying incentives refer to the items, assets, sites, attractions or businesses promoted to attract and motivate a visitor to experience the destination.

Every energetic enterprise in the destination has a role in building up a visitor industry, but not every enterprise works as a "headliner." Destinations that try to forego resolving this question end up "cataloging" instead of branding in their outside communications. They pay the price for not choosing what assets to feature by confusing visitor prospects and blending in with competition.

Extensive, original research was conducted in preparation of Completion & Connection, to determine the most efficient and effective buying incentives.

Results of this research provide a foundation on which communication; marketing and investment priorities can be set with confidence and conviction.

In the Appendix are a variety of charts that summarize the quantitative findings. A consistent Questionnaire was administered to a sample of visitor prospects that were aware of or familiar with Salisbury – Rowan County and a "cold" sample of prospects who had inquired about visiting the Piedmont region of North Carolina. More than 1,300 completed Questionnaires were analyzed in preparation of the study's findings.



The findings were unusually clear-cut. A basic snapshot is detailed here:

- Visitors and Prospects Interests Align With the Visitor Assets Found in Salisbury-Rowan County
- Visitors & Prospects Often Travel For The Same Reasons
- Visitors Rate And Rank Their Interests Similarly For A Current Visit
- Visitors Rate And Rank Interests Similarly For Future Visits
- Congruence Between Visitor Interests and Salisbury-Rowan County Assets Suggests Viable Tourism Potential
- The Interest/Asset-Matches Point To Specific Areas For Attention

The top visitor desires for the visitors' current visits were the following. The numbers show where visitors and prospects rated each interest on a scale of 1 – 5, one being low interest and five being high interest. The first rating is from the Salisbury-Rowan County sample and the second is from the "cold" sample.

Accommodating, Friendly People	3.63 / 3.83
Arts & Cultural Events	3.65 / 3.82
Outdoor Activities	3.53 / 3.51
Historic Sites / Districts	3.49 / 3.35
Downtown Activities	3.26 / 3.39

Visitor ratings for future visits were remarkably similar. "Accommodating, Friendly People" appears to be a constant, a qualifying factor, and "price of admission" at the top of the travel consideration list. The ratings for each of the subsequent interests were

somewhat higher for future visits, but they occupied the same relative rank with each other.

"**Eating Out**" emerged near the top of desires for future visits as well. (it did not appear among the top desires for the current visit.) "**Athletic & Team Sports**" emerges as an area of opportunity among the ratings for a future visit, with scores comparable to that of Arts & Cultural Events in the current visit.

A little lower on the priority list for a current visit, but showing promise for a future visit to Salisbury – Rowan County, were these visitor interests:

Concerts / Music Events	2.81 / 2.67
Hiking / Biking	2.30 / 2.17

"**Hiking/Biking**" was rated significantly higher for future visits, and even higher among the current Salisbury-Rowan County visitor. (Hiking/Biking rises

to 2.89/2.72!) The "future" and "cold" perspectives both indicate that an opportunity exists to profit from improving the recognition and delivery of Hiking/Biking experiences.

Of the two visitor interests that emerge from the study with lower than even moderate interest ratings, one is perhaps unsurprising and the other is quite surprising:

Nightlife	2.06 / 2.26
Auto Racing	2.01 / 1.81

Few, if any, stakeholders considered "Nightlife" to be a key current feature or a priority for future development. But most would probably have expected Auto Racing to figure more prominently. Rowan County's proximity to Charlotte Motor Speedway, the NASCAR Museum and the homes of many competitive race teams would have led one to expect this to



be more important than the data revealed. However, the findings are unambiguous: Racing interest rates quite low as a motivating factor for visits to the City and County.

The explanation probably includes factors such as these: Research respondents may not consider attendance at a NASCAR race to be a visit. Races are occasion-based, and it is possible that they do not attach specifically to a destination in the minds of travelers; "it's the race, not the town to many."

Adjacent Interests

An important follow-up phase of the quantitative research analysis was to examine the data in a way that revealed what *else* people were interested in. Taking the clusters of respondents who were primarily interested in History, for example, it was analyzed what other interests motivated those visitors.

Cluster examples:

Visitor Interests Can Connect Them to More (CONNECTION EXAMPLES)

- Downtown is highly interested in Arts/Culture, Eating Out, Shopping, History
- Arts/Culture has a high interest in Outdoors too
- And vice-versa
- Museums, Historical Sites, Railroad Travel:
 - Also have an interest in Outdoor, Downtown and Eating Out



Key Issues

Original research, primarily qualitative research, revealed the following Key Issues. The qualitative research component of the Plan consisted of in depth interviews (40 Executive Interviews) and guided discussions (5 Focus Groups). These are the issues that should be addressed to achieve the objective of Completion & Connection successfully.

These key issues have been presented and discussed in a series of meetings with key stakeholder groups, including and not limited to the Steering Committee, the Boards of the two Tourism Development Authorities, the Salisbury City Council and a meeting of town government and administrative officials from throughout Rowan County. In each of these meetings there was widespread recognition and agreement with this definition of Key Issues.

Key Issues:

- A. Focus
- B. Connection
- C. Organization
- D. Staffing
- E. Outdoor Opportunity
- F. Marketing
- G. Drag
- H. Starving Artists
- I. Agrarian Definition
- J. Money Moves On
- K. Sense of Place

A. Focus

Salisbury – Rowan County has excellent “table stakes” for family and upscale visitors. However there is no “hook” evident. The variety of appealing assets is undifferentiated and undistinguished – not only from competitive destinations, but critically they are undifferentiated from each other by emphasis within the community.

B. Connection

The excellent willingness to cooperate, between Arts and Downtown, between tourism-related businesses, between Agrarian and Cultural assets is not supported by strong physical connections. Cross-referencing to the visitor prospect, easy physical navigation (selection as well as wayfinding), easy transportation and visual unification, all need improvement.

C. Organization

The unusually productive structure of combining tourism authority for City, County and Arts is based largely on existing relationships, personalities and willingness. The agreement under which this structure was achieved is specific to the conditions that existed at the time it was drafted. That is, it is highly situational at this point. (The tourism authorities need to move further to a structural, administrative and financial framework that will continue to be useful – which will in fact get stronger – as municipalities and corridors throughout the county develop their own facilities and visitor revenue streams.

D. Staffing

Similarly, the current staff has evolved quickly to meet the requirements of getting tourism to the economic development table. However, rising to the challenge thus far has been mainly due to willingness, flexibility, an appetite for increased activity and belief in the future. These phenomena cannot by themselves take the TDA workday capabilities to the Varsity level that competes effectively with competitive options. The visitor industry opportunities envisioned in the planning process call for more capacity and capability in specific service areas.

E. Outdoor Opportunity

In a visitor environment that increasingly values family sports commitments (e.g., tournament baseball and soccer, competitive cheer and dance), “green” encounters with nature and active outdoor pastimes (e.g., biking, kayak/canoeing, hiking), Rowan County has impressive assets, most of which require some degree of completion and fulfillment to truly come on-stream.

F. Marketing

The community has chosen outside marketing resources wisely, but appears to be unable to hit the ball back across the net rapidly enough to take full advantage of all the good advice it has obtained.



G. Drag

Nostalgia for its big-industry past, pre-existing financial commitments and allegiance to individual assets – rather than to a future in which the rising tide raises all boats – add up to an environment in which there are substantial diversions from moving forward effectively. In addition, the issue of “Drag” includes low collective awareness of the potential benefits of a visitor industry, the skills and attitudes called upon from citizens (“Accommodating / Friendly People”) and the presence of an organized path to achieving its potential.

H. Starving Artists

With visual and performing arts representing a substantial proportion of the community’s self-image and appeal to upscale visitors, the visual art assets need a more lucrative business model and the performers need a community that truly recruits visitors, rather than intercepting them from the Interstate.

I. Agrarian Definition

Salisbury – Rowan County presents a relationship to the land that is deeply American and far more than simply rural or “country.” *The combination of nature, agriculture and civilization calls for an inspired, “ownable” identity.* Many potential visitors desire what is authentic here. Offering it effectively will call for insight and a breakthrough in cooperative action.

J. Money Moves On

The families who have provided most philanthropy in the City and County are aging. Their children have largely moved elsewhere. Increasingly over the next five to ten years, private donations for public projects will be more difficult to arrange.

K. Sense of Place

Economic development can occur passively, simply by widening Interstate 85. This type of development is almost certain within the ten-year scope of the plan. However an undeniable community of interest exists, both in the City and the County, for solidifying and even growing the identity of Salisbury – Rowan County as a place in its own right, rather than merely a Charlotte suburb, or a brightly lit section on the corridor between Charlotte and Winston-Salem. One form of development is virtually inevitable; the other takes work. Both forms of development can proceed with planning. Done properly, each form of development will enhance the other.

The problem with relying too much on suburban growth is that it brings a bias toward new construction rather than nourishment or redevelopment of existing assets.

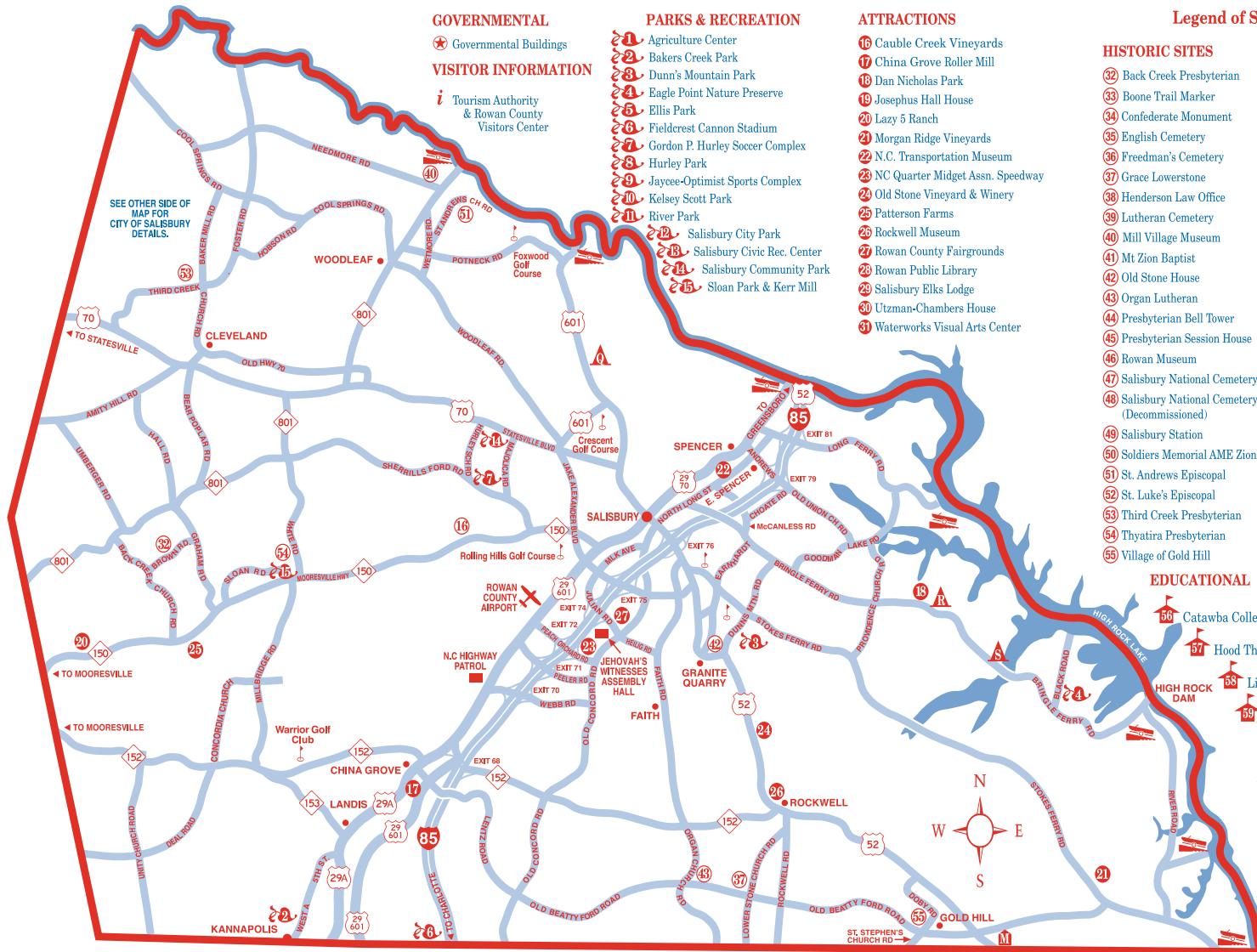
The problem with relying too much on I-85 for visitors is that the destination’s proximity to Charlotte and it’s mid-point with Winston-Salem does not seem to get the destination many overnights. So nearby people are not the answer. Also, the “accidental tourists” from I-85 don’t typically visit downtown.

Alignment of Issues

Viewing the key issues through the lens of the plan’s objective, it is seen that they align themselves with the three key factors for success in the plan:

- The Visitor
- The Destination
- The Journey

In “Strategies and Tactics” it will be seen how the key issues, and the strategies they call for, line up against these key factors for success.



GOVERNMENTAL

Governmental Buildings

VISITOR INFORMATION

Tourism Authority & Rowan County Visitors Center

PARKS & RECREATION

- 1 Agriculture Center
- 2 Bakers Creek Park
- 3 Dunn's Mountain Park
- 4 Eagle Point Nature Preserve
- 5 Ellis Park
- 6 Fieldcrest Cannon Stadium
- 7 Gordon P. Hurley Soccer Complex
- 8 Hurley Park
- 9 Jaycee-Optimist Sports Complex
- 10 Kelsey Scott Park
- 11 River Park
- 12 Salisbury City Park
- 13 Salisbury Civic Rec. Center
- 14 Salisbury Community Park
- 15 Sloan Park & Kerr Mill

ATTRACTIONS

- 16 Cauble Creek Vineyards
- 17 China Grove Roller Mill
- 18 Dan Nicholas Park
- 19 Josephus Hall House
- 20 Lazy 5 Ranch
- 21 Morgan Ridge Vineyards
- 22 N.C. Transportation Museum
- 23 NC Quarter Midget Assn. Speedway
- 24 Old Stone Vineyard & Winery
- 25 Patterson Farms
- 26 Rockwell Museum
- 27 Rowan County Fairgrounds
- 28 Rowan Public Library
- 29 Salisbury Elks Lodge
- 30 Utzman-Chambers House
- 31 Waterworks Visual Arts Center

Legend of Sites and Accommodations

HISTORIC SITES

- 32 Back Creek Presbyterian
- 33 Boone Trail Marker
- 34 Confederate Monument
- 35 English Cemetery
- 36 Freedman's Cemetery
- 37 Grace Lowerstone
- 38 Henderson Law Office
- 39 Lutheran Cemetery
- 40 Mill Village Museum
- 41 Mt Zion Baptist
- 42 Old Stone House
- 43 Organ Lutheran
- 44 Presbyterian Bell Tower
- 45 Presbyterian Session House
- 46 Rowan Museum
- 47 Salisbury National Cemetery
- 48 Salisbury National Cemetery (Decommissioned)
- 49 Salisbury Station
- 50 Soldiers Memorial AME Zion
- 51 St. Andrews Episcopal
- 52 St. Luke's Episcopal
- 53 Third Creek Presbyterian
- 54 Thyatira Presbyterian
- 55 Village of Gold Hill

HOTELS

- A Affordable Suites
- B Center Motel
- C Comfort Suites
- D Days Inn
- E Economy Inn
- F Executive Inn
- G Hampton Inn
- H Happy Traveler Inn
- I Holiday Inn
- J Quality Inn
- K Super 8 Motel
- L Volante Motel

B&Bs

- M Bed & Bike Inn
- N Duncan Hill Inn
- O Rowan Oak House B&B
- P Turn of the Century Victorian B&B

CAMPGROUNDS

- Q Bass Lake Resort
- R Dan Nicholas Park Campground
- S Tamarac Marina Campground

BOAT & CANOE ACCESS

EDUCATIONAL

- 56 Catawba College
- 57 Hood Theological Seminary
- 58 Livingstone College
- 59 Rowan-Cabarrus Comm. College

SALISBURY

ROWAN COUNTY
Authentic North Carolina

ROWAN COUNTY CONVENTION & VISITORS BUREAU
204 East Innes St., Suite 120
Salisbury, NC 28144
704-638-3100
1-800-332-2343
www.visitsalisburync.com

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Strategies and Tactics

The strategies and tactics of Completion & Connection are based on the identified Key Issues, as “form follows function.” Strategy provides the philosophical guide for the allocation of resources and organizational design to accomplish mission and goals. Strategy also serves as a guide for the allocation of resources. For Salisbury-Rowan County to be competitive, it is vital the goals be accomplished both effectively and efficiently. Resources are allocated and organized to accomplish a specific task, then the strategies of the plan are designed to achieve the objective by dealing effectively and efficiently with these issues.

Three primary strategy concepts identified by Completion & Connection are:

- Engage
- Complete
- Connect

Strategy Alignment with Key Issues:

- | | |
|----------------------------|-----------------|
| I. <u>The Visitor</u> | Engage |
| - Focus | |
| - Marketing | |
| II. <u>The Destination</u> | Complete |
| - Organization | |
| - Staffing | |
| - Drag | |
| - Starving Artists | |
| - Outdoor Opportunity | |
| - Agrarian Definition | |
| - Money Moves On | |
| - Sense of Place | |
| III. <u>The Journey</u> | Connect |
| - Connection | |

Completion & Connection recommends that Salisbury – Rowan County’s tourism marketing efforts segment prospective visitors based on their interests, as well as on their age, income, education and family size.

Data gathered from visitor research done for Completion & Connection reveal that interests are driving visitor decisions and that the interests transcend age, income, education and demographics. A resulting strategy is that marketing efforts to engage the visitor need to be based solidly on the interests of the visitor. The reason for this approach is two-fold.

First, customer purchase decisions are made with a sense of consequences and responsibility in the post-2008 marketplace, and appealing to the prospects’ “passions” or “central tendencies” is an effective way to get a place on their priority lists.

Second, digital media will give Salisbury-Rowan County a more active role in converting visitor prospects, expanding their visit to more different attractions within the destination, and making them “brand ambassadors” who recommend a visit here to their family, friends and associates.

B. Complete – The Destination

A key research finding as it relates to Salisbury-Rowan County visitor assets is that the current visitor assets in the destination align with the interests of visitors seeking to travel to the Piedmont region of North Carolina.

A. Engage – The Visitor

The strategy of engagement is based on the motivating behavior of visitor prospects and how they determine their destination choices and how they select their places to visit. Visitors engage destinations on an ever expanding platform of traditional and digital media thus increasing the potential to reach visitors yet in a more challenging and crowded market.





A key observation on the visitor assets in the destination is that as stand-alone assets they don't portray to prospective visitors a sense that Salisbury-Rowan is a destination, but collectively they can, pending they are connected in a manner that appeals to the visitor. All of the assets additionally have continued to grow and reinvest, however the local tourism assets are not without the need to expand and attract more visitors. This observation is not a reflection of any lack of effort or poor planning, but is recognition that the collective tourism authorities have a substantial role to play in the further development (Completion) of local visitor assets.

Fortunately any Completion & Connection measures are not as difficult or capital-intensive as starting

a visitor asset from scratch, and they can also be expected to improve quality of life for residents.

The Master Plan's baseline method for setting priorities and direction to complete visitor assets in Salisbury-Rowan County is through a process of establishing **Flagships and Collections**. This process is to be driven by and is founded in the visitor research completed for the plan.

Flagships: Develop key attractions to match identified themes and interests.

Flagship tourism products are those with such strong market appeal that they determine the travel decision and choice of destination.

A Collection is a set of at least three attractions that have mutual appeal by geography, theme or connecting interests. They are often related by accessibility and by their appeal to similar visitors.

The function of Collections is to add up a motivating decision. Where one attraction or visitor asset might not trigger an overnight trip, a Collection, can do so. In time and through future development strategies Collections can become a Flagship.

In addition, a Collection can extend the stay of a visiting party who may have come for a Flagship, mutually supporting the Flagship attraction.



The Implementation Plan is guided by the approach of completing at least two Flagship attractions within Salisbury-Rowan County, and assembling Collections that extend the stay of Flagship visitors as well as motivate visitors of their own. With experience, this method can become systematic, with partners and developers getting a clear indication of what it takes to become a Flagship or join a Collection.

C. Connect – The Journey

Many otherwise viable visitor assets in Salisbury-Rowan County do not meet the continual goal of motivating an overnight stay. Connecting assets that are related by interest, location or accessibility is therefore an important strategy of Completion & Connection.

“Connect” also encompasses the marketing dialog with the visitor/prospect. Connecting with them through their interests and passions is essential to accomplishing the goal.

Improving the “Journey,” the visitors’ basic access to the destination – and ensuring the continuity of that access – is the other key component of the “Connect” strategy.

Three components of the “Connect” strategy can be defined as the following:

- **Aware** [Marketing]
- **Acquire** [Inbound Routes]
- **Assemble** [Easy Transitions Among Assets]

AWARE:

The fundamental role of a convention and visitors bureau is to market the destination and represent its tourism related assets for the betterment of the citizens, the visitors and overall economic develop-

ment. One of the first goals of destination marketing is to make potential visitors aware of their product.

ACQUIRE:

Acquire is how the visitor interacts with the destination. “You only get one shot to make a first impression”, and the most common first impression in destination marketing and development is through inbound routes. Inbound routes are not just a physical route coming from the interstate to downtown they are also digital routes such as Facebook, Twitter, Pinterest, and forms of Social Media. Routes are all the ways visitors physically, electronically or mentally engage, and inquire information about a destination. Once a potential visitor becomes aware of a destination, they then acquire information about that destination in anticipation of a buying decision.

ASSEMBLE:

Effective branding and marketing enables people to understand assets from different perspectives. Assembling includes destination elements such as wayfinding, kiosks, signage standards, marketing and more. The key to assembling is creating a sense of connectivity and place that each asset knows about the other asset in a manner that is welcoming and inviting to visitors.

Aware, Acquire and Assemble are guiding principles to connect the visitor to the destination and steer the Implementation Plan.

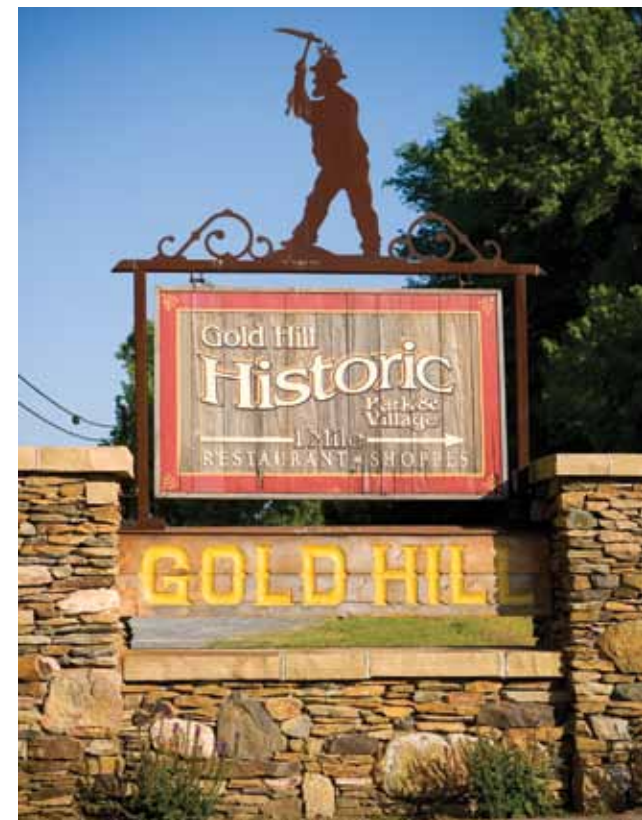
D. Destination Marketing

A comprehensive destination marketing strategy is the key to assembling visitors to Salisbury-Rowan County. Above all else the CVB must continue to focus on marketing through both programming and marketing staff.

In depth marketing is the driving force that gets visitors to a specific destination and the following are recommendations to complete and connect the marketing strategies to efficiently attract visitors to Salisbury-Rowan County.

- **Redevelopment of Website**

Consider the redevelopment of the current website with complete brand consistency between the mobile website and the mobile application.



- **Digital, Social and Electronic Marketing Platforms**

Put further emphasis on building relationships with visitors through the use of digital, social, and electronic marketing platforms including, but not limited to, popular mechanisms such as electronic newsletters, Facebook, Twitter, YouTube, Pinterest, and other evolving platforms. Social media marketing is not only one of the most effective but is also one of the most efficient forms of communication. It has the widest reach and is interest specific, allowing the visitor to interact with his/her specific interests. Instead of just seeing an advertisement the visitor can experience it in different ways.



- **Target Visitor Interests Through Packaging**

Align marketing with targeted visitor interests. For example, target people who are interested in authentic experiences in North Carolina history through outlets such as Our State Magazine. The key to success through such an example is to expand beyond simply purchasing an advertisement in a publication but instead by fully integrating the marketing by capitalizing on electronic, digital, and social media platforms.



A past example of a successful effort by the Salisbury-Rowan County CVB was when the 2010 Day Out With Thomas event at the NC Transportation Museum was packaged with other activities in Salisbury-Rowan County and promoted through the NC Division of Tourism.

Such models should be the blueprint for future development and marketing incentivized packages. Continuing to expand efforts to package popular experiences and/or assets in Salisbury-Rowan County and market them to visitors in a manner that conceptually promotes Salisbury-Rowan County as an overnight destination will be essential.

- **Festivals and Events**

Build the event experience into one that would prompt an overnight stay. Efficiently marketing and developing events is a key component of successfully developing Flagships. Events create a greater sense of place, foster a sense of energy and provide visitors an experience authentic to a destination.

- **Business Development Grant Program**

The Business Development Grant Program is meant to provide financial assistance in “completing” the visitor-ready assets that will be valuable in attracting overnight visitors to Salisbury and Rowan County. Effectively communicating the opportunities available through this program will allow more businesses to participate, therefore further developing business and tourism related assets. More details on the Business Development Grant Program are located in Area VI. Implementation Plan, Section 1C of Completion & Connection.

- **Marketing Experts for Programs, Seminars & Classes**

Bring in marketing experts to hold programs, seminars and classes for local businesses and the community. Providing this training will allow further development of City and County businesses that can attract overnight visitors. Such programs are to be offered in addition to continuing the marketing grant program and were conceptually thought to be tied together when the Joint Tourism Marketing Committee (JTMC) was formed. The JTMC established a long term goal that grant applicants be trained on the current trends in visitor marketing; Completion & Connection recommends such a concept become formalized and required for obtaining visitor marketing grants from the CVB.





• **Out Of State Visitor Marketing**

Phase 1 of Completion & Connection recommends that Salisbury-Rowan County market to out of state visitors in partnership with the NC Division of Tourism’s annual co-operative marketing program. Until Salisbury-Rowan County’s initial Flagships are further developed partnering with the NC Division of Tourism is the most cost effective and comprehensive method of marketing the destination to visitors who originate outside of North Carolina.

Solidifying a lead-conversion system for handling the inquiries that result from co-operative marketing – responding, converting and building a database from them – is a fundamental priority. An 80% increase in inquiries resulted from the first co-operative effort, and results like that must be capitalized effectively through an airtight response system.

Having a strong understanding of the visitor research data analysis will aid in effectively marketing Salisbury-Rowan County and connecting the visitors to the destination.

So Much to See and Do.

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Join Us for the 30th Anniversary of the Farmers Day Festival
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Implementation Plan

A. Years 1-3: Asset Development

1. Solidify A Lasting Administrative Structure

For Completion & Connection to be successful the driving organizations behind the plan will need to be the local Tourism Authorities. The primary implementation of the plan should collectively be housed through their operational arm the Salisbury-Rowan County Convention and Visitors Bureau.

For success, the relationship between the Tourism Authorities has to be formalized in a manner that is lasting and provides confidence to the destination and the partners required to assist in fulfilling the goals and objectives of Completion & Connection.

Until a new and balanced structure is established Completion & Connection recommends that the existing partnership between the two TDA's through their Joint Tourism Marketing Committee remain. The Salisbury Tourism and Cultural Development Commission should continue to remit 2/3 of the Salisbury Occupancy Tax to the committee and the Rowan County Tourism Authority should remit all funds available after the costs of operating the CVB are covered.

The current unity of organization, with City TDA, County TDA and Arts Council all working through the Convention & Visitors Bureau, is one of the rare assets that give the development of visitor industry a competitive advantage here. Yet "Organization" is identified as one of the Key Issues, because the degree of cooperation that exists now is not protected structurally. A framework is needed that will remain

strong, and in fact gain strength, as the initiatives of Completion & Connection move forward.

1A. Designate the CVB as a 501 (c)(6)

As a 501(c)(6) non-profit organization, the Salisbury-Rowan County Convention & Visitors Bureau can combine all resources under one organization and proportionately represents the Rowan County TDA, the Salisbury TDA, any future TDA's in Rowan County, the Salisbury-Spencer Trolley Works and the Rowan Arts Council.

- The 501(c)(6) Board of Directors is to be composed of, and appointed by the Rowan and Salisbury TDA's proportionate to funding levels (currently a 50-50 split). All tourism staff would report to and directly serve under the new CVB Board.
- CVB Board could be made up of the Rowan and Salisbury TDA Board members.
- Any new municipal TDA's in Rowan County would appoint members to the CVB based on their funding levels and occupancy taxes.
- Long term (minimum timeframe being the ten years for Completion & Connection) legal agreements (bylaws, operation contracts, etc.) would need to be established.

Advantages:

- Internal Revenue Code 501(c)(6) provides for exemption of "business leagues", including

chambers of commerce, boards of trade, and similar organizations that are not organized for profit.

- A business league is defined as an association whose purpose is to promote the common business interest and not to engage in a regular business of a kind ordinarily carried on for profit. Its activities are directed to the improvement of business conditions of one or more lines of business rather than the performance of particular services for individual persons.
- The CVB as a 501(c)(6) would have members including the Rowan County and Salisbury Tourism Development Authorities.
- Greater balance between all stakeholders
- Easier staffing of the CVB
 - Lowered overhead costs as a 501(c)(6)
 - One tourism board, one tourism staff for marketing and support
- Synchronized capacity increase;
 - As additional properties throughout the county begin collecting accommodations taxes – and municipalities assume responsibility for investing and applying those tax revenues toward visitor development and marketing – the 501(c)(6) would be positioned to serve that function and perform

those services efficiently, without additional organizational steps or levels of overhead/administration.

Overall Reasoning:

- Balance
- Impact
- Organizational Strength and Capacity
- Adaptability and Maneuverability
- Preemptive – Accommodates Future Development

Tactical, Structural and Strategic Advantages:

- Staff Flexibility
 - Allows existing tourism staff to depart from the Local Government and State of North Carolina mandated benefit plans including the LGERS (Local Government Employee Retirement System) and NC 401(k) Plan. Departure as local government employees under the Rowan County TDA is a net reduction in annual labor costs of between 7% and 10% of annual wages. Result of change is an increase in working capital for marketing and destination development initiatives.
 - Lower cost for future staff. Departure from TDA employees into a 501(c)(6) structure allows for more cost effective additions of future tourism/cultural development staff.
 - A negative consequence of the change is a substantial reduction in the retirement benefits the RCTDA staff currently receives. A more-cost effective, market-based retirement plan is recommended as a lower cost option for employees of the 501(c)(6), such as

a SIMPLE IRA (Savings Incentive Match Plan for Employees).

• Organizational Balance

- Creating a 501(c)(6) to lead all visitor development and marketing initiatives provides a more equal balance in determining operational, tactical and strategic decisions. With equal representation on the new CVB Board both Tourism Development Authorities will have a necessary and balanced role in all organizational decisions and efforts.
- Board representation proportional to funding prevents one TDA from becoming the dominant force in the 501(c)(6). As new lodging properties and the subsequent occupancy taxes occur outside of Salisbury in Rowan County (e.g. China Grove, Kannapolis and/or Spencer) an increase in funds to the Rowan County TDA would be balanced by an increase in funds to a new municipal TDA, thus keeping board presence proportional.
- Both the Rowan County and Salisbury TDA's remain in place and no changes are required with enabling legislations and/or tax rates. The 1/3 capital funds from the Salisbury TDA should remain with the Salisbury TDA's Destination Development Committee, but should work directly with the new 501(c)(6) Salisbury-Rowan CVB on capital programs for Completion & Connection.
- Currently the Rowan County TDA is covering all costs associated with operating a CVB (overhead, databases, staff, operations, visitor center, trolley, arts council management, CVB management, etc.) and allocating its remain-

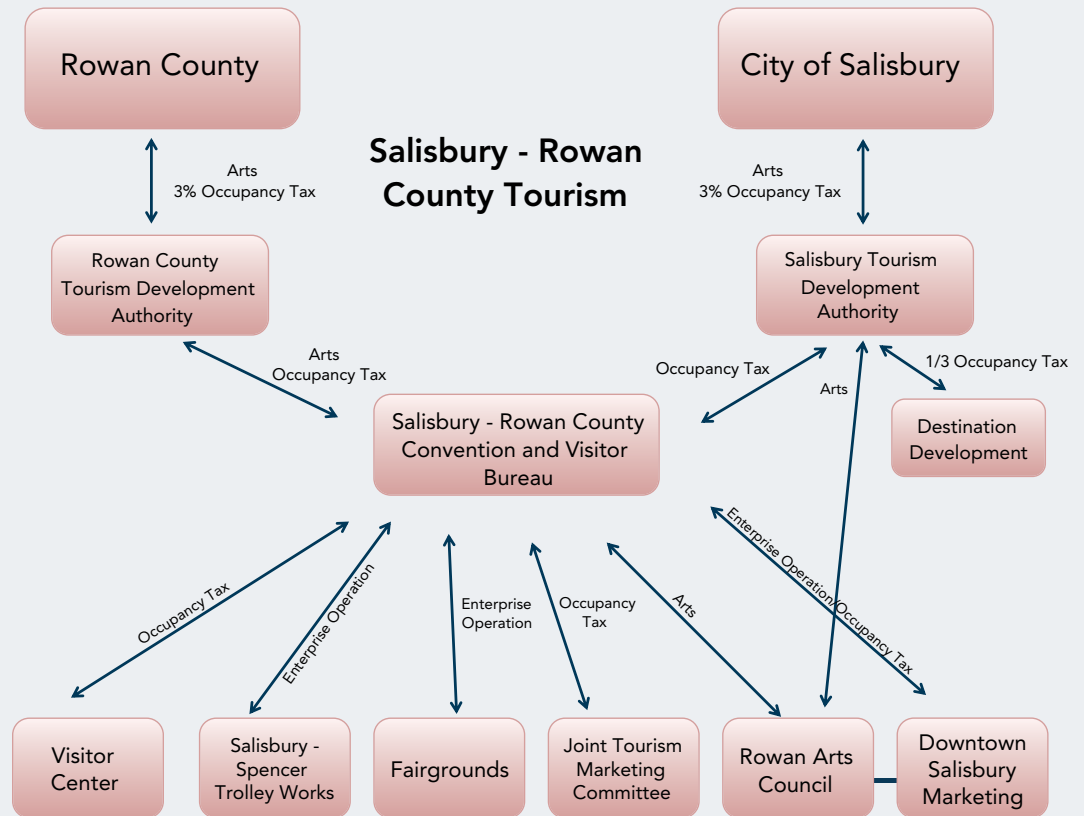
ing funds to the Joint Marketing Committee. The Salisbury TDA has no costs for operating a CVB and is currently funding the majority of all marketing through the joint committee and all development through the destination development committee.

- Hence one TDA has all the fixed costs and the other TDA has primarily variable costs...this is imbalanced and not sustainable.
- Allows for an easier addition of any new TDA's in Rowan County to the cooperative marketing and development efforts of the visitor industry, through proportional representation tied to funding of the 501(c)(6), the Salisbury-Rowan County CVB.
- Completion & Connection recommends all occupancy taxes collected in Rowan County be remitted from the respective TDA's to the CVB, less any funds retained for the Destination Development Committee, which cannot exceed 1/3 of the Salisbury occupancy tax, the Salisbury TDA is not required by law to dedicate 1/3 to capital.
- **Organizational Focus And Capacity**
 - As a 501(c)(6), similar in nature to a Chamber of Commerce, the newly formed CVB will have a higher capacity for launching development initiatives than the current structure.
 - 501(c)(6) would have a capacity to borrow funds, if elected by its Board of Directors, for the purpose of expediting projects by obtaining financing from lending institutions, leveraging what will be close to

\$650,000 annually in operating funds in 2012 and will continue to increase over the next 10 years, especially as new hotel product is added.

- Focus of effort is preserved by adding new elements to a 501(c)(6) organization rather than going through multiple government entities – which in the next 10 years could include more TDA's than those existing now – to implement Completion & Connection.
- Provides greater stability for establishing long-term partnerships.
- For instance the Salisbury and Rowan TDA's have jointly agreed to partner with and manage the Rowan Arts Council through the CVB. All documents and decisions around the Arts Council partnership were crafted and made with the understanding that it is a long-term partnership, one widely accepted in the community.
- However Completion & Connection notes a major dilemma in that the TDA's are collectively building partnerships to support other organizations for the long term yet among themselves they only have a short-term relationship through an annual Memorandum of Understanding (MOU). A one-year MOU is not sustainable for the long term.

The following is the proposed organizational structure for Salisbury-Rowan County Tourism:

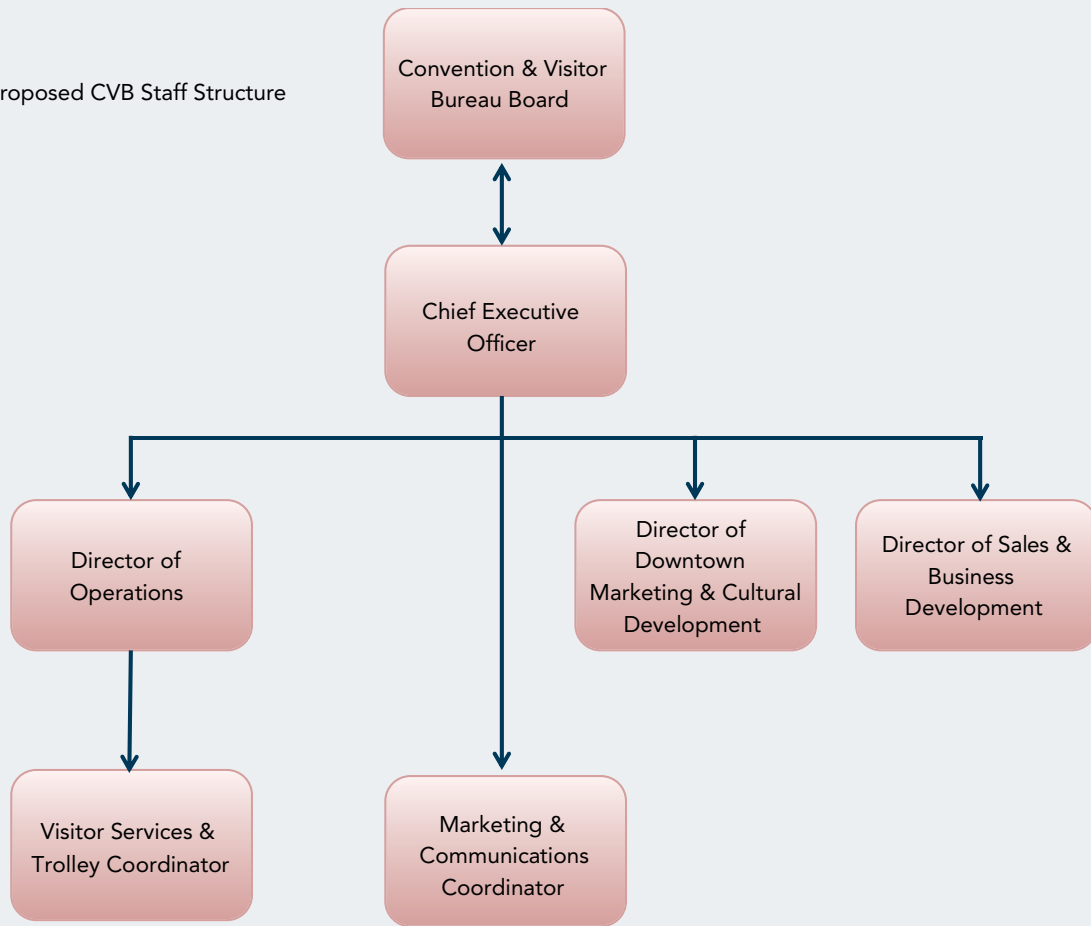


1B. Staff and Structure for Implementation

The successful implementation of Completion & Connection requires a fully staffed Convention and Visitors Bureau, with the ability to cover multiple areas of expertise. Two additional staff positions are recommended initially for the CVB to facilitate the initiatives encompassed in the first phase of Completion & Connection.

Often times Boards and/or members of the community believe that “adding staff” hinders marketing. In certain cases such assumptions are correct. For instance if a community only had a CVB with budget of \$250,000 or less, having more than two full time positions and two part-time positions (3 full time equivalents) would be unwise as it would hinder marketing.

Proposed CVB Staff Structure



The combined efforts of the Salisbury and Rowan County Tourism Authorities through the CVB require that resources typically dedicated for “marketing” be allocated to secure staff focused on marketing and tourism development.

Given the demands and expectations placed on tourism officials in Salisbury-Rowan County, more staff is a key component to increased capacity, even if some

paid advertising is sacrificed. Qualified tourism staff is a greater marketing asset than paid advertising, on a dollar-to-dollar comparison, when analyzing CVB’s larger than \$500,000 a year. Customers become larger, decisions longer, potential impacts bigger, which all require more staff time.

Additional tourism staff will add to the capacity for the CVB to market more efficiently and deliver a

greater tourism experience and product to visitors and to the destination.

The first position to be filled is a full time staff member focused on destination marketing and communications. The second initial addition to CVB staffing/structure is a position to focusing on Downtown marketing, arts and cultural development in addition to providing support to the Rowan Arts Council. Both are critical and should be added soon after adoption of Completion & Connection.

A third additional position is recommended later in Phase 1, to provide greater operational capacity for the CVB primarily in the area of Group Sales and Business Development.

Above is a revised CVB staff organizational chart based on the discussed realignment of the CVB becoming a 501(c)(6) organization:

Marketing and Communications:

It is recommended that the TDA recruit a qualified person to perform the day-to-day direction and coordination of marketing. The position can be fielded by an entry-level individual, who is versed in destination marketing. A key marketing issue was identified in Completion & Connection for the TDA to have enough capacity to respond to opportunities and initiatives proposed by outside marketing resources and with its own marketing initiatives.

The position should be funded by resources currently dedicated to the Joint Marketing Committee and then through the combined funding of the CVB (once formed as a 501(c)(6). The position needs to be filled early in Fiscal Year 2012-2013.



Primary Duties of the Marketing and Communications position:

- Further development of brand identity in light of Completion & Connection
- Development of annual marketing plan and assembly of visitor database
- Conventional media plans, digital and social media programs
- Public Relations/Media-Travel Writer Relations
- Day-to-day interaction with marketing and media partners
- Coordination of all marketing campaigns and strategies
- Assistance to partners in aligning individual marketing efforts with the overall visitor brand
- Direct staff support for the Joint Tourism Marketing Committee
- Event marketing and support
- Coordination of marketing grants program

Director of Downtown Marketing & Cultural Development:

The Director of Downtown Marketing & Cultural Development would not only support Downtown Salisbury as a tourism asset but in time would develop marketing programs and plans for other vital Downtowns in Rowan County. Additionally this position would support the Rowan Arts Council in

developing a greater product portfolio of Arts and Culture in Rowan County. Much of the concept behind an Arts and Cultural Development position originated in the City of Salisbury’s 2008 Cultural Action Plan.

Initially this position should be funded in the same manner as the Marketing and Communications position, but in time it can transition to a self-funded position through the Arts Council. Position is also recommended for FY 2012-2013.

Duties of the Director of Downtown Marketing and Cultural Development position should include:

- Marketing, public relations and communications for Downtown Salisbury as a tourism asset and other Rowan County Downtowns
- Rowan Arts Council
- Arts and Cultural Communication and Public Relations
- Festivals and Events management and development
- Public Art initiatives
- Salisbury History & Art Trail
- Represent Arts Council/TDA on “Events Incubator” work team
- Resource development through grants and arts fundraising
- NC Grassroots Grants Program
- Partner relations

Director of Sales and Business Development:

An executive-level person should be added at an appropriate time during Phase 1 (years 1 – 3), as demand and inventory grow, to directly support the sales efforts of hotels, to actively recruit group visitation and to help lodging properties host and facilitate groups during their visits. As the visitor sector of the economy expands and increasing demands are placed on the CVB to increase visitation the CVB will need to secure an individual with extensive background in Hotel Management, Sales and/or Destination Sales and Marketing.

- Development, management and implementation of CVB Sales and Marketing strategies
- Oversight of all marketing programs implemented by marketing and communications
- Expansion of position over time to focus on long term business development strategies that seek to increase overnight visitation
- Work closely with the Executive Director and support the Business Development Grant Program (see 1C.)
- Work closely on expansion and new development of amateur sports, both in terms of tournament recruitment and product development
 - Amateur sports continue to be a significant driver of overnight visitors to destinations, especially weekend business.

1C. Set Up Visitor Business Development Grants

Initiate a program of Business Development Grants, through the CVB, to provide financial assistance in “completing” the visitor-ready status of assets that will be effective in attracting overnight visitors to Salisbury and Rowan County.

The grant program is not intended to fund the development of assets in their entirety, but rather to support private and public efforts related to tourism development. Existing assets as well as new ones should be eligible. A percentage of accommodations tax funding should be allocated to the program each year. The program structure, funding level, qualifications and application reviews for the



Business Development Grant Program will be the responsibility of a committee of business and community leaders. The CEO of the CVB should be the standing administrative member of that committee.

The CVB has compiled positive experiences as the source of marketing grants to enable events, attractions and businesses to conduct marketing initiatives that attract visitors. This experience indicates the success potential of extending grants for business development also.

Business Development Grants are to serve as a key tool for completing the initiatives and achieving the objectives of Completion & Connection. They will be a competitive advantage over other destinations. Funding models (such as Asheville, NC’s Tourism Development Fund) exist within the state, to serve as best-practices guides for reviewing and qualifying grant applications.

1D. Refine the Salisbury-Rowan County Brand

Conduct a Brand Refinement process to sharpen the focus of visitor marketing and communications.

The research findings and the direction identified in Completion & Connection validate “Authentic North Carolina” as a basic communication position. This brand position was developed by a collaboration of outside marketing resources with community and business leaders, and was orchestrated in 2008 by the Rowan County Tourism Development Authority.

The brand can be made more specific, engaging, useful and efficient in attracting visitors, by acting on the research findings and strategies identified in Completion & Connection.

Opportunities to increase marketing and communications efficiency through brand refinement include:

- New data on visitor desires gives specific “hot buttons” to use in developing brand message selection.
- The strategy of “Engage” calls for specific performance characteristics to be used in graphic design.
- The brand promise of authenticity can be communicated more clearly, specifically and graphically by using the priority of interests identified in Completion & Connection research.
- A “brand architecture” can be developed that initially appeals to primary motives and expands business through cross-selling, by using the plan’s identification of “adjacent interests.”
- A unified visitor/economic development brand could be explored, to determine how effectively “easy to do business with” might become one of the meanings of “Authentic North Carolina.”

Completion & Connection shows specific relationships between visitors’ central tendencies and their additional motivations. By refining the brand and developing brand architecture, Salisbury – Rowan County can present visitor assets in a way that capitalizes on these connections.

1E. Shift to Digital Visitor Centers

Use technology to assist visitors at multiple locations.

Traffic to the Visitors Center has declined significantly in recent years. The rate of decline at the counter almost exactly matches the rapid rise in visitor inqui-

ries and unique visitation through the CVB's central web site, www.visitsalisburync.com. This presents considerable opportunities to capitalize on a tourism industry trend and respond to current visitor trends and preferences. Benefits of a shift to digital visitor centers include:

- Economies by reducing public floor space and staff time.
- Reinvesting the savings in development projects and/or additional marketing.
- Effectiveness of deploying visitor assistance and cross-sell where it is needed.
- Serve multiple visitors simultaneously through technology.
- Visitor centers are less costly if they are not staffed and it becomes economically feasible to provide more than one location.

Touch-screen kiosks, possibly developed in partnership with Fibrant, can be designed and deployed at attractions, local assets and high-traffic locations.

Prerequisites for vacating the current Visitors Center operation include the following:

- Design and populate a mobile app to guide and assist visitors.
- Devise and deploy an appropriate amount of visitor kiosks in the destination, currently multiple locations are covered across the destination through the CVB's existing Kiosk program.
- Build and maintain public restrooms at a more convenient location to service the needs of



visitors. It is recommended to pair a public restroom project with another tourism development project in Downtown Salisbury

1F. Visitor Marketing

Devise a new visitor marketing plan in light of the findings of Completion & Connection. Within the strategy of Engage, it is anticipated that new plans will include the following concepts, among others:

- Take maximum advantage of partnerships with the NC Division of Tourism to reach out-of-state visitors for overnight stays. Utilizing the reach and capacity of the NC Division of Tourism is the most cost effective manner to reach out of state visitors, promote local tourism assets and drive down stream traffic to visitsalisburync.com

- Foster more cooperative marketing opportunities for local businesses and tourism-related partners.
- Continue the marketing grant program within the marketing plan budget, providing for qualification standards, review committee and funding through a consistent percentage of occupancy tax collections.
- Present a workshop/seminar program that brings marketing professionals to local businesses and partners, to increase their capacities and expertise, and to promote further cooperative relationships.
- Activate a group sales strategy focusing on existing assets – most notably targeting the sports market and smaller meetings and conferences that can utilize existing meeting space.



- Emphasize authenticity as a collective experience embracing all visitor assets. Encourage this brand consistency by establishing standards for qualification within the co-op and grant programs.
- Revisit past incentive-based concepts to include a visitor tool in the mobile app that contains incentives to visit more places, stay more nights and return for future visits.
- Increase marketing focus on social media platforms that include, but are not limited to Facebook, Pinterest, Twitter, YouTube and Blogs. Integrate this platform with brand consistency and effective linking. Consider a YouTube channel with a video calendar of events and a Blog to promote festivals, events and area attractions in addition to the social media already in place.
- Consider promoting hot deals and packages through a content management tool that allows visitor industry partners to add deals and packages themselves.
- Enhance the destination's website to include an ecommerce aspect where packages can be sold directly to visitors for area attractions, lodging, dining and events.
- Improve the visitor industry partners listing by allowing each to have a page on the website with photos, videos, maps, etc.
- Consider partaking in a cooperative video program with local attractions to create short videos for the attractions to place on their industry partner pages.
- Create a video calendar of events; select key events to promote and develop 15-30 second videos that, when displayed on a calendar, an icon shows for the video of the event. When the mouse hovers over the icon, the video enlarges and plays immediately.
- Develop an interactive map to allow visitors to select the places they want to visit and map them. The map should be connected to a database of attractions in the area.
- Consider a new design for visitsalisburync.com. The current website is well established but has been in place since 2008 with only minor upgrades. A new design every 3-5 years maintains a fresh perspective for visitors and can improve the destination's ranking with search engines. When redesigning the website also perform a Search Engine Optimization (SEO) analysis.

1G. Create Marketing Strategy for the Arts

Marketing Salisbury's many artists, art galleries, and arts and cultural institutions can be challenging. It is recommended to contract for development of a marketing plan specific to the arts, aimed at building regional attendance at performing arts presentations (for overnight stays) and attracting "collectors, not browsers" to visual arts venues.

A specific arts and culture marketing strategy was initially proposed in the 2008 Cultural Action Plan. Such a strategy should include both the commercial and nonprofit arts and cultural sectors with the understanding that tourism marketing is based on a combination of community building and promoting authentic local experiences.



Additionally, the strategy should address maintaining close organizational connection between the TDA and Rowan Arts Council in a manner that continues to grow the economic impact of arts and culture in Salisbury-Rowan County.

The South Carolina Cultural Tourism Marketing Collaborative is an excellent example of best practices in regional arts and cultural marketing. The purpose of this collaborate is to link the arts community to tourism promotion in ways that improve cultural resources and support economic vitality for artists and communities using the arts for economic development. Goals that the S.C. Cultural Tourism Marketing Collaborative has identified could easily transfer over to Salisbury-Rowan County and aid in developing a marketing strategy for the arts.

These goals include:

- Attract new cultural tourists
- Increase cultural tourism
- Encourage return visits
- Encourage increased expenditures during subsequent visits
- Provide a reliable information source for tourists interested in arts

Key Partners Anticipated for the Salisbury-Rowan County CVB Include:

- ☑ Area Lodging Properties
- ☑ Arts Council & Affiliates
- ☑ City & County Recreation Departments
- ☑ Downtown Salisbury Incorporated
- ☑ Economic Development Commission
- ☑ Educational Institutions
- ☑ Fibrant
- ☑ Heritage-Related Organizations
- ☑ Land/Agrarian-Related
Businesses & Entities
- ☑ Land Trust
- ☑ Local Governments
- ☑ Transportation Organizations
- ☑ Visitor-Related Businesses

For more information on this work, visit: <http://www.southcarolinaarts.com/tourism/eartsguidelines.shtml>.

An additional area to consider when developing a comprehensive marketing plan for arts and culture in Rowan County is the CVB's partnership with the Rowan Arts Council. The partnership in Salisbury-Rowan County is fairly unique and provides multiple avenues for marketing and development that were not possible before the partnership was formed.

Completion & Connection recommends leveraging each organization in a manner that can secure additional funding for new sources including but not limited to State and Federal funding in addition to foundation grants and economic development grants that pertain to tourism, arts and cultural development. The CVB should dedicate staff time via the Director of Downtown Marketing and Cultural Development in seeking and applying for various grants and new funding resources.

2. Establish Sustainable Partnerships

Fulfillment of the plan requires that sustainable partnerships be established among business, government and administrative entities throughout the City and County. The TDA budgets are not in themselves sufficient to fund all the development and outreach recommended in Completion & Connection. Nor is all the required expertise, perspective or manpower located exclusively in the Convention and Visitors Bureau.

The previously recommended Business Development Grant could serve as a vital tool in building new partnerships centered on the visitor economy, since the grants would serve as a mechanism to attract private investment.

2A. Formalize Strategic Partnerships

Over time securing long term more formalized partnerships will greatly aid in the successful implementation of Completion & Connection.

A partnership is an informal or contractual cooperative effort joining two or more organizations that have recognized a common goal, in this case, increasing visitor spending, quality of life and economic development. Partnerships should transform



into strategic alliances, or long-term partnerships, to create stability and better serve the overall efforts of the destination. In order to develop partnerships, key partners need to be identified to assist in the development of a shared vision for a successful visitor destination.

Through partnerships the CVB can achieve more than it could on its own. Overall marketing efforts can increase through cooperative programs, there are more advocates for tourism, and there is an increased knowledge base in the community when strong partnerships are in place. Several types of destination partnerships exist and should be explored by the CVB in order to foster relationships and successfully build strategic alliances.

These partnerships may include:

- One-time Cooperative Programs
- Short-term, Marketing Partnerships

- Multi-activity Cooperative with the Same Partners
- Strategic Alliances
- Multiyear Cooperative Programs Contracted to Achieve Specific Goals

Partnerships play a significant role in connecting tourism assets, the community and the CVB and should not be overlooked. The Salisbury and Rowan County Tourism Development Authorities have always relied on partners and over time should continue to establish and develop these long-term mutually beneficial relationships.

3. Cultivate Business Economy and the Business Traveler

A basic tenet underlying Completion & Connection is to support and sustain the business traveler that

currently makes up about 85% of overnight visitors to the City and County.

Developing the full potential of both targets, the leisure and business traveler are interconnected and can mutually support each other.

- Business travel currently is the main driver of hotel occupancy revenues needed for development and maintenance of the destination.
- Leisure travel is the main driver of revenues to attractions, both man-made and natural.
- Dining, arts, culture and entertainment all need the leisure traveler to fully capitalize on their investments and offerings, but are also supported by the business traveler and are important mechanisms for promoting "Quality of Life" factors.

- Getting business travelers more engaged in attractions, dining, arts, and entertainment assets during their stay is an important potential source of business. (An updated Business Resource Guide that cross-sells to "leisure" assets is recommended. – 3B.)

- Tools that will facilitate the business traveler's effectiveness will also enhance the leisure visitor's experienced, e.g.:

- Mobile app: Discover Salisbury-Rowan County
- Fibrant broadband fiber optic installations in hotels and tourism assets (high speed data is important for both business visitors and leisure visitors)



- Initiatives which were at first envisioned as enhancements of a leisure destination – such as wayfinding, public art for sense of place, and streetscapes that impart openness and energy – will also benefit the business visitor and the development of a creative business economy. These components provide key features that are necessary for a destination to thrive.

Additionally, building on the existing close working relationship between the Convention and Visitors Bureau and the Economic Development Commission is important to the implementation of Completion & Connection. Due to a growing need to be efficient, and consolidate services, the EDC and CVB partnership was first conceptualized as a goal of the Rowan County TDA in 2009. It was presented to the TDA and EDC boards in 2011 to move forward with specific collaborative strategies focused on retail, commercial and business development.

This conceptual partnership has been further amplified by Completion & Connection leadership interview research and recent calls in Salisbury-Rowan County to focus more on retail, commercial and business recruitment, which both directly and indirectly supports the visitor economy.

The following describes a proposed partnership structure between the Convention and Visitors Bureau and an Economic Development Agency:

- CVB should consider dedicating funds on an annual basis for business marketing endeavors.
- Establish a joint committee made up of CVB and Economic Development Representatives.
- CVB should partner with Economic Development leaders to create a collaborative business

marketing plan to address local needs and the needs to increase business activity and drive further overnight visitation to local hotels.

3A. Quality of Life & Economic Development: The Creative Economy

A stated paradigm during development of Completion & Connection was based on an observation which planners called “The Irish Patient.” Ireland developed a visitor industry with minimal capital investment based on natural beauty and cultural heritage. The influx of cash from that visitor industry – plus the presence of an educated workforce – became the foundation for high-tech business investments into a Creative and Knowledge based economy supported with cultural roots that promoted quality of life. Ireland made itself the European center for digital design, software and data processing when technology was the wave of economic development, using tourism industry income as part of their own financial fulcrum.

Today, knowledge-based business is an economic opportunity that municipalities seek to attract, and Salisbury-Rowan County has the foundation for taking part in that wave of economic development. Cultivating a tourism industry is particularly suited to this goal because the assets that attract visitors also enhance quality of life for residents. Knowledge based and creative economy businesses and their work forces are often times more likely to engage local tourism assets and serve as regular patrons of such facilities.

Quality of life is frequently a basic requirement for retaining the workforce that is already educated here, and for attracting the investment, entrepreneurs, and intellects that make up the creative economy. The Irish paradigm has been a reminder

of the overall goal: vigorous, sustainable economic development. In this paradigm, the tourism industry is a means to an end.

Completion & Connection recommends the Salisbury-Rowan CVB work more closely with Economic Development organizations and tourism industry partners to further develop and market Quality of Life attributes in the destination.

Tactics to consider for Quality of Life for development and promotion:

- Greater marketing of events and arts and cultural venues, programs and development opportunities.
- Increase the number of regularly held events in an effort to create “energy” and sense of place. Connect the event efforts with other strategies in Completion & Connection such as with Downtown Salisbury and the other towns in Rowan County.
- Increase communication to existing businesses and employees about the variety of arts/cultural/tourism options in the destination. Convert locals into visitor “patrons” of tourism assets. Consider partnering with the EDC, Chamber of Commerce, the Arts Council and area business to generate greater enthusiasm from locals about the community they live in. People are a part of the tourism product. Helping them understand that increases the psychological carrying capacity of a destination.
- Quality of life is partially based on perceptions and word of mouth. With social and digital platforms a common manner of communicating; local conversations in the social arena about any

given destination needs to be positive in order to help attract greater visitation.

- Work to provide low cost programs that incentivize local citizens to serve as ambassadors who actively promote the destination outwardly to friends, groups, associations and relatives through social networks and digital platforms. With Quality of Life driven in part by perception...strong local ambassadors are key.

3B. Focus Support for Accommodations

The following strategies and tactics deal specifically with the experience of the business traveler. There is an opportunity to focus support for the experiences of the business traveler, who are 85% of their guests.

Completion & Connection recommends that the CVB partner with current and future accommodations in the development of facilities and amenities that allow Salisbury-Rowan County to be perceived as an “easy to do business with” business community. Suggested initiatives include but are not limited to:

- Help foster possible partnerships with Fibrant and local accommodations in an effect to provide first class data capacity.
- Broadband and wireless business centers in hotels.
- Digital and interactive visitor information kiosks.
- Assistance in guiding and facilitating groups during their visit.
- Consider a repeat business traveler rewards program done in partnership with local accommodations, restaurants and/or local gas stations and retail businesses.
- In an effort to convert the business travelers to potential weekend travelers the CVB should consider offering discounts to local attractions to encourage the business traveler to bring back his/her family to the destination for the weekend.

The recommended programs of Marketing Grants and Business Development Grants (1C.) can be resources for these initiatives.

3C. Business and Community Orientation

Consider developing and employing a community program throughout Salisbury-Rowan County that through a rewards system encourages local citizens to more greatly support economic development by acting as visitor hosts.

The most immediate benefit of this orientation will be to make business travelers and other guests feel more welcome and comfortable. “Friendly, accommodating people” was the number one motiva-

tor visitors looked for in a destination and such a community program would add to Salisbury-Rowan County’s effectiveness in this area. Further, the benefits of such a program would work to enhance the overall development of leisure assets within the Salisbury-Rowan County visitor sector of the economy

Research done in conjunction with Completion & Connection indicated visitors had a top ranking for “accommodating, friendly people.” This trend was identified in both samples of quantitative research and cannot be passed over lightly, even though attitudes and awareness are not as visible as other visitor assets.

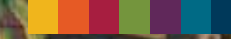
One of the key issues identified in Completion & Connection is low awareness within the destination of the potential benefits of a visitor led economy, and the skills and attitudes called upon from residents to foster and grow the visitor industry. Communities often conclude that “some need training; all need inspiration,” when it comes to citizen preparedness for a tourism industry.

The qualities of “accommodating, friendly people” can be considered similar to other destination assets, in that strength already exists, but some degree of completion is required. (For example, residents often are unfamiliar with distances, directions and street names because they have known how to get around their hometowns all their lives.)

Key features needed in developing a community orientation program would include, and not be limited to:

- Hospitality By The Numbers – the miles and exit numbers vital to giving easy directions to visitors





- The All-Time Win-Win – the importance of visitors to economic development here, and the benefits to residents of developing visitor assets
- Home Field Advantage – the key assets to know about, so that residents can pass on their own appreciation (This can be structured as a game.)
- Train The Trainer – Consider establishing a visitor oriented training program from business professionals and front line supervisors. It is important to have the support of business managers in advocating the importance of providing an environment of “accommodating” individuals. A potential partner is the Rowan County Chamber of Commerce through its Leadership Rowan program. Focus on developing a greater emphasis on hospitality and tourism in the leadership program.



In addition to providing orientation programs and incentive rewards to citizens the CVB needs to consider positioning itself as an organization that “not only supports the visitor, but supports the citizen.” CVB’s by design are outwardly focused on attracting visitors and developing assets that attract even more visitors. However, CVBs also need to be embraced by the local community as an organization that benefits all.

The Salisbury-Rowan CVB has maintained a strong presence in the local community and has built a substantial amount of goodwill towards tourism and its role in economic development. The “story of tourism” has grown rapidly in Salisbury-Rowan County and is supported through its continued coverage in the local media and regular reporting on the economic impact of tourism. Additionally when

tourism leaders make decisions that are impactful to the tourism industry and the local destination they are routinely covered and conveyed to the local citizenry.

In order to maintain and expand goodwill in the local community Completion & Connection recommends the CVB reserve a small, but significant portion of its annual funding as a Local Sponsorship Fund. The sponsorship fund should be used to support local causes and efforts that are important to the community, namely charities and organizations that provide a positive benefit to local citizens through some aspect of tourism. In the end the CVB and the Board of Directors are members of the community in which they seek to market and develop for visitors.

3D. Train Tourism-Related Businesses

Provide training to further develop businesses within Salisbury-Rowan County that can attract overnight visitors. In addition to marketing and business development grants (1C.), develop training programs in marketing, customer service and other fields required for success.

Completion & Connection recommends launching a training program to further develop the skills of employees that serve visitors at area tourism related businesses. Potential partners could be Livingstone College, Catawba College and Rowan Cabarrus Community College in addition to the Rowan Chamber of Commerce.



The Salisbury-Rowan CVB should focus on training the workforce to be accommodating to visitors in partnership with local educational institutions such as through the hospitality program at Livingstone College and the business program at Catawba College. These partnerships and training programs can foster a greater visitor experience, which in turn leads to enhanced economic growth for the community.

Furthermore, Completion & Connection recommends the CVB establish partnerships to foster greater development of local marketing expertise and capacity. A well trained business economy versed in the most current marketing trends and skills will better serve the businesses and the overall awareness of Salisbury-Rowan County.

- More marketing + Better marketing = More Awareness
- Potential partners include, but are not limited to the previously referenced local educational institutions, Rowan Cabarrus Community College and the Rowan Chamber of Commerce

3E. Promote Commercial Redevelopment

Completion & Connection notes that growth in the retail and commercial sectors are beneficial to the local tourism industry. Such growth provides a source of hospitality jobs, new businesses and assets to attract visitors and additional streams of business and tax revenues into the destination. It is recommended that the CVB continue to expand its role in fostering opportunities in commercial and retail development that are connected to and benefit the local tourism industry. In 2011 the CVB took such actions by expanding the scope of tourism staff and building off of a 2009 Board of Directors Goal to work on expansion of business travel through the support of general economic development.

The CVB should continue to partner with the Economic Development Commission and development organizations on addressing projects that will impact the local tourism industry. Focus should be on multiple-use developments that could facilitate overnight visitor business, including lodging, dining and retail. The CVB should consider reserving funds for the marketing of sites and development concepts and when applicable site drawings and conceptual designs of development projects that will have a substantial impact on the visitor economy.

4. Establish 2 Destination Flagships

Salisbury – Rowan County does not currently have a visitor “Flagship,” that is, an activity or attraction that by itself can consistently prompt overnight stays. To get the benefits of the “Flagships and Collections” approach to destination development, it is proposed that the two activities/attractions that are nearest to becoming a Flagship be completed in the first phase of Completion & Connection, years 1 through 3.

4A. Downtown Salisbury

Complete the critical mass of assets required to make Downtown an overnight visitor attraction. Connect history, art, culture, cuisine and retail offerings to each other and to their respective target audiences.

Thanks to concerted efforts over the course of many years by businesses, benefactors, local government and Downtown Salisbury Incorporated, the downtown area offers perhaps the greatest concentration of potential visitor attractions. Certain elements and catalysts are recommended to complete the ability of Downtown Salisbury to take a Flagship role in the tourism industry.

In addition to recommended elements for development, the CVB should continue to have an active role in providing grants to Downtown Salisbury organizations and cultural entities, provide marketing support for Downtown Salisbury, operate the Salisbury-Spencer Trolley Works and maintain a physical presence in the Downtown.

The recommended elements and catalysts in years 1 through 3 are:

History & Art Trail

- Expedite completion of the Salisbury History & Art Trail. Design and deploy new interactive marking features.

Signage / Way-Finding

- Complete the signage / way-finding program and provide for its ongoing adjustment and maintenance.



Public Art

- Partner in the annual purchase annually of public art. Apply standards for selection that gives public art a direct, constructive, role downtown. Selected works should serve as unifying influences, guides and illustrations. Art also helps to define and differentiate a destination.

Downtown Portal

- Erect a public art or architectural feature that can serve as a visible, defining, hilltop entry to Historic Downtown Salisbury, drawing visitors through the commercial corridor on Innes Street that intervenes between I-85 and Downtown.

Rail Connection

- Encourage greater use of the Historic Salisbury Station as reception venue for meetings and group tours. Connect the Station with the Transportation Museum via the Trolley system on specific, opportune occasions.
- Consider the use of docent talk en route guides for key events such as the October Tour of Homes.
- Integrating Historic Salisbury Station more directly into Downtown, group meetings, Arts and Heritage experiences is a key connection for visitor development. Rail is part of Salisbury's present and future as well as its past.

Centerpiece

- Allocate resources, design and build a forum in Downtown Salisbury, working title: "Center-

piece," as a focus for gatherings, culture and agrarian linkage.

- Centerpiece could include multiple assets that were discussed as Downtown needs during the executive interviews and when reviewing past planning documents, assets were an outdoor stage/amphitheater, a new Farmers Market, family recreation / playground facilities and infrastructure to facilitate events, including public restrooms and digital visitor information kiosks.
- Completion & Connection recommends consolidating all the aforementioned assets into one location, however if such consolidation is not feasible it is still important that all are completed in some order to provide the Flagship experience in Downtown Salisbury.

Authentic Salisbury Holiday

- Present an annual turn-of-the-century Salisbury Holiday Season.
- Include features and attractions such as the following:
 - New Holiday decorations for Downtown, authentic, refined and tasteful, in a theme that reflects the atmosphere of the Downtown
 - Marketing outreach built into annual TDA marketing plan
 - Presentations produced in partnership with organizations such as Piedmont Players for productions such as:

- Charles Dickens' A Christmas Carol (a new script by novelist John Jakes has been produced successfully in the region)
- Scenes from The Nutcracker ballet
- Trolley tours with Victorian costumed guides
 - Retail tie-ins with turn-of-the-century theme
 - Restaurant drinks and menu items from the period
 - Time-honored traditions that will attract families and shoppers, such as ice-skating and photos with Santa Claus



Confederate Prison History

- Preserve and present the unique Confederate Prison history that is within the walking scope of Historic Downtown Salisbury.
- Make it engaging and accessible to the general visitor and not only the Civil War buff.
- Utilize current technologies, social and digital platforms to reach new markets and tell the story to new visitor segments

- Partner with the Salisbury Confederate Prison Association to interpret interesting aspects of the story, including:
- Individual and family stories connected to the Prison
- Findings of archaeology and forensics conducted on the site
- Consider the use of marketing grants and staff support to assist the SCPA annually in promoting attendance at the Confederate Prison

Symposium, as a significant group meeting held at multiple Salisbury locations.

African-American Heritage Audio Tours

- Produce an audio/self-guided presentation on both digital and social media platforms of the African-American Heritage Trail, including three modular tours:
 - Downtown Salisbury & Vicinity – 21 sites
 - Livingstone College & Union Hill – 24 sites
 - Rowan County – 11 sites

Bike Loop Downtown

- Assist in developing and deploying the Historic District Tourism Loop proposed in the Comprehensive Bike Plan. Include lanes, mapping and signage.

Business Development

- Support efforts to provide facilities and training for entrepreneurs to develop visitor-related businesses.
 - Since thriving offices are key to enlivening a downtown – providing steady, day-to-day customers for restaurants and retail stores – a downtown location would serve as desirable location for establishing a business incubator.

Downtown Salisbury Destination Marketing

- Connect Downtown Salisbury marketing to the CVB's overall marketing.
- Link the Downtown experience to the CVB's brand "Authentic".





- Incorporate consistency of message, when applicable, among the various businesses and assets in Downtown Salisbury.
- Expand reach: Increase the scope of marketing related to Downtown Salisbury, both in terms of geographic reach and marketing related platforms.
- Market the authentic qualities and traits of Downtown Salisbury, focuses on the unique people and places that comprise the Downtown, “keeping it real” attracts new visitors.

Empire Building Situation Analysis

The Empire Building, a historic landmark built over 150 years ago, is located in downtown Salisbury across the street from the Meroney Theatre, City Hall, the current Farmer’s Market and the future central office for the Rowan-Salisbury School System. The Empire is owned by Downtown Salisbury Incorporated (DSI) which bought the property in 2007 for around \$1 million and financed the project with the help of multiple banks. DSI never intended to own the property long-term but rather sought out a developer who shares the community’s vision for its historic preservation and for downtown development.

Various development scenarios have been considered previously but the cost of the project combined with the current economic environment has created a significant challenge. The immediate need is to establish the financial resources to meet the obligation to the lending institutions who supported DSI on the Empire.

There are currently no significant development agreements under consideration, not because of lack

of effort, but primarily because market conditions since 2008 have not been ideal for such a project.

The project is significant in that if fully developed, the Empire would complete one of the community’s most visible destination Flagships, Historic Downtown Salisbury, which is also one of the most compelling visitor attractions in the area.

The building occupies nearly 1.4 acres of prime real estate on Main Street, and in its current condition, creates a disappointing impression for visitors who come to see a town that prides itself in architectural preservation.

Various solutions for the Empire situation have been debated among government officials, civic leaders and key stakeholders, all of whom have a vested interest in the vitality of downtown Salisbury. Because the Empire is supported by and important to the public, the debate is sometimes challenging as varying opinions are shared in regard to expectations.

Many want to see the property restored to its original state, as a hotel, but finding the right developer who is willing to finance a project with many more variables than developing a new hotel is unique and rare in such an environment.

In 2012 the cost per room to develop a brand new hotel equal in quality to a Hilton Garden Inn or Courtyard by Marriott was approximately \$100,000 to \$110,000 per room. An Empire redevelopment would require a different approach than standard hotel construction as the redeveloped property would most likely include retail space and meeting space. The addition of retail space does add to the potential of the Empire.

A standard comparison between new hotel construction and the Empire is difficult to obtain because of the varying factors between such projects. Any development scenario for the Empire would need to reach a development target cost for the hotel portion in the \$100,000 range in order to be competitive in the market.

If a difference in development costs exists, considered a funding gap, then it does create a substantial hurdle for the Empire. However, the funding gap could be overcome through available tax credits, making an eventual return on investment more obtainable. Such a scenario will require a development strategy from a qualified developer that can effectively tie available tax credits into the project’s financial model and balance the ratio of commercial space to hotel space in a manner that is competitive.

Potential support should be considered if a viable and ensuing development agreement surfaces. Supports perhaps in the way of an adjacent parking lot, upgrades to the sidewalks and surrounding public infrastructure or supporting facilities are among the possibilities. Such an approach is not unusual.

Many municipalities have entered into development agreements where public funds were allocated as incentive to private investment. Several local governments in neighboring North Carolina cities have built supporting facilities to compliment privately developed downtown hotels as a means to create economic energy, which also increased local tax collection. Most recently the City of Raleigh has entered into an agreement with Summit Hospitality for the development of a new Marriott hotel in Downtown Raleigh.

For Completion & Connection to be successful in developing Downtown Salisbury into a Flagship visitor



destination does partially hinge on the redevelopment of the Empire.

Redevelopment does not require a hotel. Improvements to the first floor with new retail and visitor related businesses in addition to enhancements in the surrounding infrastructure will go far in improving the Empire Block of Main Street. Completion & Connection recommends the CVB to continue to support DSI's efforts in the redevelopment of the Empire, even if not as a hotel.

Downtown Salisbury History Experience

A key factor in making downtown a Flagship should include enhancing the history experience that is

offered to visitors. Existing products such as the African-American Heritage Audio Tour, History and Arts Trail, Walking Tour, the Rowan Museum, and the Confederate Prison need to be further developed to incorporate a wider range of visitors. Potential methods for improving the history experience include but are not limited to developing an all-encompassing brochure, exploring the possibility of interactive maps on the CVB's website, and improving the simplicity of audio tours.

4B. Agri-Scenic Outdoor Flagship

Agri-tourism is one of the fastest growing segments of the tourism industry. It has a broad base of appeal in large part because agri-scenic sites provide enter-

tainment, education, relaxation, outdoor adventures and most importantly an authentic experience for the entire family. Salisbury-Rowan County is uniquely qualified to capitalize on this trend, and the following are recommendations to grow this sector of the visitor economy into a Flagship:

- Assist in expanding and updating existing visitor assets such as Patterson Farms and Lazy 5 Ranch, and Dan Nicholas Park. (See 1C. Business Development Grants)
- Consider developing a product inventory map and identify areas of opportunity for additional product development to support further growth in the agri-scenic portfolio.
- Focus specifically on areas of development that can support public-private partnerships, targets new segments of visitors and has a track record of success. Examples could include but are not limited to corn mazes, behind the scene tours, new interactive/hands on experiences and adventure based experiences.
- Incentivize overnight stays by cross-promoting additional visitor assets in connection with the agri-scenic experience
 - Connect and cross-sell agri-scenic assets with visitor traffic to Dan Nicholas Park and vice versa. Expansion of marketing platforms such as the current visitor kiosk program should be considered a baseline model.
 - Make it easy for visitors to key sites such as Patterson Farms and Lazy 5 to locate lodging, dining and other attractions. Additionally cross-promote such assets at lodging and dining facilities.

- Work with agri-scenic sites on developing general marketing strategies that provide reach into new segments, leverage existing marketing initiatives and provide cooperative marketing opportunities.
- Extend the Salisbury wayfinding system to agri-scenic sites and other visitor assets throughout the entire destination.
 - Expand integration of the wayfinding system that works to connect multiple tourism assets and creates a greater sense of place and stronger appeal as a destination.
 - The wayfinding system should not be limited to Salisbury.
- Aggressively promote agri-scenic assets in the CVB's overall marketing plan, specifically by incorporating the sites through imagery, positioning and inclusion in marketing campaigns that incentivize and reward visitors to the destination.
- Explore expanded partnerships with the wineries such as through festivals, events, regional and statewide cooperative marketing. Consider locating events in partnership with the wineries in a Downtown setting as a mechanism to support both Flagship goals.
- Look towards the North Carolina Division of Tourism and the North Carolina Grape Council for identifying new marketing avenues and tourism development initiatives pursuant to wineries.
- Connect the Agri-Scenic experience with Historic Downtown Salisbury.

- Extend the Salisbury Greenway trail to connect its Memorial Park inception with Downtown thoroughly.
- Begin qualifying Salisbury for official designation as a Bike Friendly Community.
- Conduct culinary trail tours connecting Downtown restaurants with wineries.
- Continue and facilitate referencing Downtown restaurants, arts and culture from key agri-scenic visitor points.
- Market the Farmer's Market in the region as a visitor asset
- Explore completion of the Centerpiece project for Downtown Salisbury; the inclusion of a Farmer's Market element supports both the Downtown Flagship goal and the Agri-Scenic Flagship goal.

5. Assemble 2 Collections

5A. Rail

The empirical research findings convey that visitors would be willing to use high-speed rail, if available. In order to gain a competitive edge over other destinations, Completion & Connection recommends capitalizing on this emerging trend in a market that is already saturated with the desire for rail could push the destination ahead of its competitors. The following are recommendations that could turn rail into a Collection for Salisbury-Rowan County. At a core perspective it involves recognizing rail as a distinctive visitor asset.



Reception Point

- Cultivate indoor and outdoor facilities at Historic Salisbury Station as a setting for welcoming visitors to Salisbury-Rowan County. Continue the current efforts in the community that have successfully integrated the Station with Historic Downtown and Rail Walk Arts District events.
 - Explore using the Salisbury-Spencer Trolley Works as an avenue to allow visitors by train to better explore the entire destination. Past efforts have been considered by the CVB but consistency of demand and supply has always been issue.
 - Completion & Connection suggest working closely with Amtrak marketing representatives on accurately describing available services and visitor options in the area and using digital and social platforms to push rail options into Salisbury-Rowan County.
 - Consider greater connections between lodging business and rail. For instance discounts

for rail passengers at local hotels, complimentary shuttle service to and from hotels and the train station. These efforts additionally support the need for the destination to be “accommodating”

- This rail element could be used to attract both over-night visitors and day-trip visitors.

Big Attraction

- Continue and increase support and promotion of the North Carolina Transportation Museum as a unique feature to Salisbury – Rowan County, the Towns of Spencer and East Spencer and as an attraction for families and multi-generational visitor parties.
- The NC Transportation Museum is a critical component of the local tourism industry and should be supported by the CVB. It pro-



vides an important avenue to promote the history, present and future, of travel in North Carolina in addition to supporting the town of Spencer and attracting tens of thousands of visitors a year.

- Seek partnerships with the NC Transportation Museum that focus on adding new events and activities that work to attract additional visitors to the destination and increase visitation to the site.

Prepare For Opportunities

- Stay abreast of any future developments around additional rail service that involve connections with Western North Carolina as well as the potential for High Speed Rail in the region that could connect Salisbury to Charlotte, Raleigh, Washington, D.C. and New York City at potential speeds of 90-125 mph.
- Seek out new partnerships that could expand Rail into a Collection:
 - Work with the North Carolina Rail Division when and if applicable on advocating the importance of rail and on opportunities available to expand ridership in the area and region
 - Explore marketing partnerships with Amtrak on promoting visitor assets in Salisbury-Rowan County and establishing packages around a “rail experience.”

Rail as an Adventure

- Market and promote rail travel into Salisbury-Rowan County as an adventure experience.

Since rail is not a predominate form of leisure based travel in North Carolina, Completion & Connection recommends the CVB seek to capture the authenticity and uniqueness of rail based travel.

- Package rail travel with assets such as over-night accommodations, agri-scenic activities, downtown events and arts and culture.
- Part of any package should include any additional transportation required to navigate the destination.
- Often an obstacle to travel by rail is the visitor’s inability to move within the destination once they have arrived since “they have no car” and often times rental cars are not available at the destination’s train depot.

5B. Light Adventure

Light adventure involves outdoor activities that take place in an environment that is less controlled and encompasses a wider variety of visitors, including more family members and multi-generational parties. Light adventure also expands visitors’ familiarity with what a destination has to offer, and also gives the visitor time to connect to the destination in a variety of environments.

The following are potential methods that could be incorporated to support further development of this segment of the visitor economy:

Point The Way

- As discussed with agri-scenic development there is a need to extend and enhance the Salisbury wayfinding system to make it easy for visitors to



discover multiple assets including the available outdoor experiences in Salisbury-Rowan County.

- Include Light Adventure features such as trip planning, inside knowledge, local tips and navigation based directions in the mobile app.

4 X 4 to Paddle Tours, Rail and More

- An opportunity exists in Salisbury-Rowan County to capture a truly authentic experience that appeals to adventure seekers, young couples, small groups, young families and the young at heart. Completion & Connection refers to it as a “Temporary, but Lasting Jeep Experience.” Not a proper marketing name, only a descriptive phrase.

Imagine a tourism product that connects rail with the excitement of an off-road experience to the experience of getting a paddle wet in a river to

hiking through nature trails and up to observation platforms all while being away yet being where the cell phone still works and all it was all secured via a one stop package.

Such a product could be developed as follows:

- Visitors arrive by train at the Salisbury Depot
- Waiting for the family of four is a 4 door off-road ready Jeep Wrangler.
- Already entered into the vehicle’s navigation system is a weekend worth of adventure that could include kayaks, hiking, canopy or zip line tours, behind the scenes access to pick your own farms and driving through Lazy 5 with the top down and the animals leaning right inside the vehicle.
- All accommodations are arranged in advance, all meal options are secured.

- Rewards could be utilized to have visitors share the experience through social platforms
- After a great weekend visitors simply return to the Salisbury Depot catch a train ride home, share the memories and have a “Temporary, but Lasting Jeep Experience” in Salisbury-Rowan County that stays with the visitor well beyond the weekend.

Such products (packages) as described above are a lasting mechanism to connect multiple sites, building destination, and generating new visitation all in an authentic style unique only to Salisbury-Rowan County.

Completion & Connection recommends the use of business development grants, marketing grants and private sector partnerships to cultivate the “Temporary, but Lasting Jeep Experience”.

Developing a product/marketing name for the package that is more compelling to visitors than the descriptive name (“Temporary, but Lasting Jeep Experience”) is a critical step. The descriptive phrase was given for the purpose of this plan.

Downtown Salisbury & Light Adventure Connection

Establish through careful planning the connections from visitor focal points such as Downtown Salisbury, Dan Nicholas Park, Patterson Farms, Lazy 5 Ranch, etc., to canoe and kayak outfitting points on the Yadkin River Trail and throughout the Uwharrie Lakes region that would enhance the experience.



High Rock Lake

- Identify and develop opportunities to facilitate fishing tournaments and actively promote more visitor usage of High Rock Lake. With 365 miles of shoreline, Rowan County has the second largest lake in North Carolina, with significant potential for additional visitor business.
- Work closely with the Land Trust on opportunities to open recreational activities on High Rock Lake.

Dunn's Mountain Park

- Partner with the Land Trust and Rowan County Parks and Recreation to build awareness of Dunn's Mountain Park as a nearby adventure, with a family-friendly hike to the top of Dunn's Mountain, 83 acres of foliage, butterflies, birds and rock formations, and a view that extends on clear days from Charlotte to Mocksville.
- Connect Dunn's Mountain to light adventure packages

Salisbury-Rowan County Birding

- Support birding visitors with trail tips on the TDA website and mobile app. Identify key lo-

cations and list them with Bird Watchers Digest magazine online.

- Consider signage at trail heads and designated viewing points

Expanded Hiking

- Identify and develop day-hiking trails within Salisbury-Rowan County. Partner with guide services to link trail hiking with fishing, canoeing, kayaking for the more robust outdoor visitor.

Country Roads Biking

Develop, signpost and promote the seven additional bike loops identified in the Comprehensive Bike Plan. (Deployment may continue into Phase 2.) Tie in with the Piedmont Heritage / Daniel Boone Loop and the Uwharrie Loop of the Central Park Bicycle Plan from the Piedmont Triad Regional Council.

B. Years 3-5: Infrastructure Improvement

1. Make Family Sports Facilities **The 3rd Flagship**

Complete and promote the existing facilities in an effort to improve the destinations capacity to host tournaments, camps and workshops in baseball, softball, soccer, cheerleading, etc. Include promotion of them in the CVB's annual marketing plan.

The importance of sports tournaments, workshops and related amateur/family events is that they concentrate overnight visitors on the weekends, amortizing the same fixed lodging investments that host business travelers during the week.

Family and tournament sports have many of the same advantages as the "meetings and conventions" business, and more. For example, families taking part in sports travel in larger parties and often make more retail purchases than do business travelers.

Salisbury-Rowan County currently houses facilities that are very near to qualifying for this important source of visitor business.

- Salisbury Parks & Recreation's current fields appear to require only the addition of lighting and parking capacity to equal the competitive capacity found in surrounding destinations.
 - Completion of the facilities at Community Park would substantially increase the capacity for Salisbury-Rowan County to host youth sports. Completion & Connection recommends the CVB work closely with Parks and Recreation and develop a strategy to expedite completion.
- CMC-NorthEast Stadium (formerly Fieldcrest-Cannon Stadium) in Kannapolis may be a partnership opportunity to provide a special setting for tournament finals.
- Continue to aggressively recruit sporting events such as fishing tournaments, bike races and soccer.
 - Continue to provide sponsorship funds to such events in a manner to secure the business for the local visitor economy.
 - Develop a sales strategy specific to recruiting sport tournaments.



2. Bike Friendly Community

Completion & Connection recommends the consideration of obtaining an official designation from the League of American Bicyclists as a Bike Friendly Community. This will involve setting up a working committee or task force, and setting in motion the measures required to qualify during Phase 1.

With nine other North Carolina communities having achieved this designation it can be considered a proven tourism development tool, but that is not common or overused. The process of qualifying for this designation sends visible signals to residents and visitors alike that quality-of-life is a priority. When designation is achieved, it identifies a community as considerate and up-to-date among visitor prospects as a whole, and serves as a powerful endorsement to those whose specific interests include biking, exercise and outdoor experience.

As of May 2011, the League had received 452 applications and designated 179 Bicycle Friendly Communities in 44 states. The five categories in which a community is evaluated to qualify for the designation, "The Five E's," give an initial sense of what it takes to travel this path:

- Engineering (e.g., bike lanes, multi-use paths)
- Education (e.g., cycling and safety instruction)
- Encouragement (e.g., Bike Month, Bike-To-Work Week)
- Enforcement (e.g., ongoing liaison with Law Enforcement)
- Evaluation & Planning (e.g., monitoring use and safety stats)

Providing bicyclist friendly opportunities in the destination further supports Completion & Connection's recommendations of offering light adventure opportunities and also supporting youth and amateur sports. Salisbury-Rowan County has already made efforts in cultivating bicycling enthusiasts and has successfully converted them to overnight visitors. An example of this is the annual Crossroads Classic event held throughout Salisbury-Rowan County.

Further enhancements for a bicyclist friendly destination could include:

- Supporting efforts to provide improved bike maps and routes.
- Utilizing technology to enhance the bicyclist's experience.

- Continue to provide sponsorship funds for bicyclist events that provide an economic impact to the community and increase overnight visitation.

3. Designate and Develop Gateways

Developing streetscapes, landscaping appeal and business incentives to conform the appearance of properties to an appealing standard are all tools to consider in providing a welcome mat to the destination, and to its tourism assets. Such a process works to enhance the visitor's experience and encourages repeat and referral visits.

Select the preferred routes for visitors to take to Flagship assets. Encourage development along these routes that is:





- Visually appealing and hospitable
- Supportive of the activities people visit for
- Incorporate public art to reflect the cultural elements of the destination
- Create a sense of place
- Connect with existing infrastructure improvement plans already developed by local government and/or transportation organizations
- Consider adding monument-based or architectural entranceways in connection with the visitor wayfinding signage system
- Address “Welcome To” signs for Salisbury-Rowan County and all the municipalities in the destination.

4. “Our Towns”

In addition to Salisbury, the municipalities and their subsequent communities make up an authentic component of the entire destination experience. During the planning process for Completion & Connection, interviews were held with all the municipal leaders in Rowan County. It was clear that each municipality has a unique set of circumstances that dictate policy and economic development strategies, however all collectively agree on the goal of increased economic development by attracting more visitors to “town.”

Completion & Connection recommends building on many of the successful strategies, tactics and programs employed in Downtown Salisbury and replicating similar practices, when applicable, in other towns in the destination.

However, Completion & Connection does recognize that what works in one town may not work in the other and encourages the CVB to remain flexible in any parameters set around funding support for visitor marketing and development initiatives connected with the towns.

Kannapolis:

- The town of Kannapolis presents a unique situation in that roughly half of the town is in neighboring Cabarrus County and half is in Rowan County. Much of the tourism infrastructure in Kannapolis, minus the CMC north stadium, resides in Cabarrus County including the majority of lodging and dining facilities.
- Kannapolis is an example of investing in tourism infrastructure that also supports the community, most notably the town of Kannapolis’ investments in Village Park which houses recreational opportunities, family opportunities, and entertainment and performance space. Such an example could be successful on the appropriate scale in other Rowan County towns.

4A. Develop & Promote Rowan County Communities as Destinations

Utilize the Visitor Business Development Grant and Marketing Grant programs to encourage communities throughout the destination to complete and connect their assets and events with the visitor.

- The CVB should work with each town on identifying their specific needs and developing long term strategies to fulfill those needs for both marketing and tourism development.



- Once strategies and tactics are identified, an implementation board similar to the one in Completion & Connection should be developed and shared with appropriate stakeholders for input, guidance, and awareness.
- The implementation board would allow towns to plan for and understand the potential tourism investments made by the CVB, connected with the Our Towns initiative.
- Recommendations for how the CVB could aid in this process include:
 - Establish regular communication channels.
 - Provide marketing plan development options.
 - Provide complimentary branding sessions.
 - Hold community focus groups and input sessions.
 - Continue to actively promote events and activities.
 - Consider sponsoring new events and activities.
 - Work with municipal leaders when appropriate on recruiting tourism related businesses.
 - Considering holding business and community orientation programs as discussed in 3C for each town related to visitor based marketing and development strategies.

- Provide marketing resources, when applicable for economic development projects that would impact the visitor economy.
- Consider establishing working committees with the towns on developing marketing and tourism programs...such a method works to increase input and reach of the CVB through collaboration.

5. Heritage Connections

Completion & Connection recommends the CVB continue to promote and develop the expansive history of Salisbury-Rowan County to visitors. The following are areas of recommendation to consider while moving forward.

- Continue Efforts to Promote Rowan County's Rich African-American Heritage
 - Celebrate African-American churches
 - Preserve and present the role of African-American churches in the culture and development of Historic Downtown Salisbury and the entire destination.
 - Refine the African-American Heritage Trail
 - Modify and extend content and media for interpreting the Trail based on user experience and volume achieved during Phase 1 of Completion & Connection.
- Develop and offer new historic based trolley tours.

- Consider opportunities to provide an increase in access to historic properties (hours, images, narratives, virtual tours, etc).
- Begin efforts via partnership with appropriate organizations and stakeholders to develop the Confederate Prison into a physical tourism site.
- Continue to focus on providing history to visitors at a pace that is dictated by the visitor themselves as opposed to a pace set by the entity or organization operating a historic site or attraction.
- Focus on new technologies that expand the capacity for visitors to interact with and appreciate Salisbury-Rowan County's heritage.

6. Connect the Dots

6A. *Scenic Byways*

- Build on the established routes and incorporate with Light Adventure.
- Identify and develop new scenic routes that can extend visitor interest to adjacent communities and attractions.
- Work with community groups and the Department of Transportation on maximizing signage for scenic byways and best practices for marketing and communicating the byways as a tourism site.
- Collect and gather digital imagery of the byways for marketing and promotional collateral...images sell a destination.

6B. Facilitate Winery Tours

- Provide and promote trolley transportation to visitors between wineries, through scenic byways, and among agri-scenic assets – to be organized through partnerships.
- Explore culinary trail tours that originate in Downtown Salisbury and incorporate overnight accommodations

6C. Local Cuisine/Wineries

- Organize weekend tours that include a selection of restaurants, visits to the wineries, agri-scenic attractions, and the Farmers Market. Schedule transportation services such as trolleys for escorting visitors from winery tours to local authentic restaurants.
- Consider developing weekend long events around local cuisine and wineries in an effort to expand weekend visitors and increase overnight visitation.
- Examine events in other destinations for best practices.

6D. Town-Gown Connection

- Develop routes, conveyances and occasions that will make Downtown Salisbury a more frequent, integral experience for students and families at Livingstone and Catawba College.
- More retail, dining and entertainment expenditures during their student days, and a higher retention rate of educated young people upon graduation, will result from building up the

connection between Downtown Salisbury and the colleges.

- Bike lanes, retail and dining specials, special college ticket prices and special college nights for performances and entertainment events are to be encouraged. The possibility of a weekend shuttle between the Catawba campus and Downtown should be explored based on demand.
- Downtown merchants and restaurateurs should be supported in cooperatively developing college family events for those dates when students are “delivered” and moved out in the cycle of the school year, via the marketing grant program.
- Examine entertainment options in Downtown Salisbury that would attract college age students. For example if an opportunity arises to secure a first run movie theater in Downtown Salisbury, the CVB and DSI should actively pursue it. Downtown Morganton, NC has benefited greatly from such a project.

6E. Rail to the Mountains

If conditions exist, consider developing and promoting rail excursions to destinations such as Asheville and the Blue Ridge Mountains. The Salisbury-Rowan CVB could utilize its existing partnerships with other convention and visitor bureaus to develop and promote such a concept. Additionally, employ an intercept strategy to make Historic Downtown Salisbury the Arts & Culture beginning of that experience for visitors (particularly Charlotte visitors). *“We’ll get them going and coming.”*

These elements related to rail are important because they provide avenues to fully develop the Downtown Salisbury Flagship with its Arts & Culture, History, Retail and Cuisine offerings. Being connected to a rail experience helps foster completion.

The Transportation Museum is an excellent partner for such a tourism product as they are already providing excursion opportunities. Consider a multi-leveled partnership with Amtrak, the museum and the CVB to provide leisure based rail excursions that include Salisbury-Rowan County. Current excursions from the Transportation Museum generate a significant number of overnight visitors and still have capacity to expand.

7. Continuation

Completion & Connection notes the importance of continuing to focus on the initiatives in Phase 1 and especially the initiatives and/or strategies that have not been completed. The CVB should continue to dedicate resources towards:

- Destination marketing
- Business marketing
- Flagship development
- Development of Collections
- Support for tourism related businesses
- Stakeholder communications
- Visitor services
- Tourism related infrastructure projects
- Continue to support a strong and lasting administrative structure

Furthermore, during Phase 2 of Completion & Connection the CVB should partner with a 3rd party



organization such as in the past to perform new visitor research. The visitor research should focus on:

- Comparing trends from data at the start of Completion & Connection to new research findings
- Assess current visitor interests
- Analyze market competition
- Current situation analysis
- Effectiveness of Completion & Connection strategies
- More detailed analysis of the total economic impact of the tourism industry, specifically its impact on Rowan County's GDP and what percentage of the local economy is driven by tourism and visitors.

C. Years 5-10: Support Development

In Years 5-10 (Support Development) of Completion & Connection a significant component of the CVB's strategy needs to remain focused on destination management, marketing and development. Emphasis should always remain on the core competencies of any CVB; providing destination leadership in the areas of visitor marketing and tourism development. Specific attention is to be given towards the areas of:

1. Destination Marketing, Management and Development

- Research based destination marketing that supports attracting visitors to the destination through integrated platforms that drive visitation in concert with Flagships and Connections.

- Continue to dedicate human capital and financial resources towards tourism and destination development initiatives outlined in Phase 1 and Phase 2 of Completion & Connection.
- Fostering arts and cultural development in connection with the creative economy.
- Supporting businesses and business travelers.
- Actively recruiting group business to increase overnight visitation.
- Enhancing the authentic nature of Rowan County Towns.
- Providing high levels of support for all visitor related businesses.
- Transfer all visitor kiosks managed by the CVB to an interactive and digital based platform by the end of 2020.

In developing strategies for Years 5-10 it is important to recognize that predicting market and economic conditions are challenging. For example in 1996, strategic plans for the tourism industry did not predict the events of September 11, 2001 and 2004 plans did not predict the economic recession in 2008-2009.

Concepts for Years 5-10 of Completion & Connection are a priority based road map that includes development concepts built on the foundations of current and/or potential products related to Salisbury-Rowan County. However such concepts will require additional market study and should be driven by demand, market and financial conditions present at that time.

2. Downtown Flagship Expansion:

- Hotel Development: if the Empire is not redeveloped as a hotel, based on market conditions in 2018 and beyond, then explore either recruiting a new hotel project or if feasible and available continue focus on the Empire.





- **Entertainment:** provide support to cultural institutions to double the level of entertainment performances in Salisbury from 2018 to 2023. If completed the Downtown centerpiece project will assist in the goal by providing an authentic outdoor entertainment venue.
- **Sense of Place and Center for Activity:** If market conditions allow and not at the detriment of an existing business, partner with DSI to actively recruit new entertainment options to Downtown such as a first run movie theater as found in Downtown Morganton, NC or “family fun” venues that provide activities for the entire family.
- Such product development will add “continual energy” to the Downtown as they provide a steady flow of commerce at night on an annual basis and provide secondary activities for visitors to enjoy while exploring the destination.

3. **Group and Conference Connection**

- Use added CVB staff capacity, the annual marketing plan and the marketing grant program to actively cultivate new, repeat and expanded business among Social, Military, Educational, Religious and Fraternal conferences, using existing lodging and meeting facilities.
 - Achieve high capacity utilization by targeting groups specifically related to Salisbury – Rowan County interests/assets, e.g., History & Heritage, Art & Culture, Agri-Tourism, Historic Preservation & Restoration, etc.
- Analyze market conditions to determine if demand exists for additional meeting space in the destination
 - If strong demand exists consider developing strategies for additional public meeting space.

4. **Business and Product Development**

- Through partnerships with economic development agencies continue focus on commercial and retail development, specifically on dining and retail businesses that could fill market holes and/or complement existing businesses in the destination.
 - **Interstate Development:** Salisbury-Rowan County has a significant amount of undeveloped land at Interstate Exit ramps along I-85, specifically outside of Salisbury.
 - Through partnerships with economic development agencies and local governments the CVB should take an active role in recruiting developments that support growth in the tourism industry namely through lodging, dining, retail, entertainment and transportation related businesses.
- Take an active and continuous role in promoting rail access to Salisbury-Rowan County. Potential high-speed rail service could provide business and leisure travelers an excellent alternative to air and auto for trips between 100-500 miles.
 - Position and promote Salisbury as an ideal starting point for art, theater, cuisine and scenic outdoors excursions by train.
 - Continue to cultivate awareness and relationships with Charlotte, Triad, Raleigh and Greenville, SC visitors. Make Salisbury and Rowan County a preferred and ideal getaway option.
 - Consider working with the North Carolina Volunteer Train Host Association to provide

welcome guides or “docents” on rail routes that arrive in Salisbury.

- Partner with the NC Transportation Museum and support additional rail related experiences, such as train tours through some of Rowan County’s landscape, similar in nature to the Great Smokey Mountain Railway attraction.

5. Our Towns Expansion

- Partner with local governments to develop additional recreational assets suitable for tournament sports and other youth (family) competitions.
 - Assess the experience of promoting existing facilities in Phase 2, and the set of facilities built subsequently in nearby communities. Complete and promote additional capacity as options for tournament and workshop planners.
- Offer assistance and support to the Town of Kannapolis in developing and promoting additional family recreation facilities in the vicinity of CMC-NorthEast Stadium (formerly Fieldcrest Cannon Stadium).
- Launch infrastructure initiatives that support the visitor experience within Rowan County Municipalities:
 - Expand the wayfinding signage system to all 10 municipalities by 2023, keeping brand consistency and interconnectivity.
 - Marketing funds should be dedicated towards this initiative in an effort to fully connect and complete the visitor experience.

- Seek and develop public art strategies in partnership with municipal leaders in an effort to grow the arts and cultural sector of the visitor economy and to further enhance sense of place.
- Consideration for public restroom facilities, public gathering places and active parks in Rowan County municipalities. Seek funding partnerships to complete such projects.
- Digital based visitor centers (digital kiosks) throughout Rowan County municipalities.

6. Dedication to the Creative Economy

- Use quality of life and economic activity to retain the workforce that is already educated in Rowan County, and to attract the investment, entrepreneurs, and intellectuals that make up the creative economy.
- Consider providing marketing and business development grants towards new endeavors within the creative economy that seek to expand human capital, recruit visitors and improve the quality of life and economic prosperity in Salisbury-Rowan County.
- Continue efforts to utilize Fibrant as a competitive advantage with business travelers and as a high end platform for delivering tourism content digitally to current and prospective visitors.
- Establish focus groups and or working committees to establish strategies for blending technological advancements with arts and culture as a mechanism to grow arts and cultural commerce

and help distinguish the destination and foster greater economic growth.

7. The Land and Light Adventure

Salisbury-Rowan County is blessed to have the Yadkin River and vast amounts of pristine land protected and preserved in a manner that has a potential to foster greater economic development through recreation and the visitor economy.

- Expand upon efforts to develop and market light adventure options for families and visitors.
 - Establish a strategic alliance with the LandTrust
 - Identify and develop new recreational opportunities on property preserved by the LandTrust.
 - Work with the LandTrust and other groups to develop a first class canoe/kayak trail on the Yadkin River in Rowan County.
 - Increase hiking options along the river.
 - If applicable and agreed upon, develop off road trails on lands that allow “treading” and connect it with the Jeep experience outlined in Phase II, Section 5B, Light Adventure.
 - Consider recruiting private outfitters to support visitors and recreational opportunities.
 - Increase access to High Rock Lake and Tucker-town Lake through new recreational opportunities such as dedicated parks with swimming access, picnic options and restroom facilities.



The Road Ahead



A. Strategic Implementation Board

The “Strategic Implementation Board,” located in the Appendix, summarizes all of the projects and recommendations included in this plan. The board is intended to be a working document for evaluation of the implementation process. Each recommendation that is presented on the Strategic Implementation Board is supported in more detail throughout the plan. It represents an overall summary and work plan for Completion & Connection, a 10-Year Tourism Industry Master Plan, Growing the Visitor Economy in Salisbury-Rowan County, North Carolina.

B. Time Frame

The projects are divided into three time frames, short-term, mid-term and long-term. The short-term series of projects focus on concepts that should begin immediately after the plan is adopted, and then continues to focus on asset development.

Short-term initiatives should be completed by the end of year 3, which for Completion & Connection are the years of 2013, 2014 and 2015.

The mid-term initiatives focus on infrastructure improvement and ideally would be completed throughout Years 3-5 (2015, 2016 and 2017).

The final series of initiatives are long-term, focusing on structural development. These projects are to be completed over the following five years (2018, 2019, 2020, 2021 and 2022). Completion & Connection should conclude by January 1st, 2023.

As with any master plan, completion of all initiatives is connected to a variety of factors and conditions that can change over time. Timeframes are primarily established to give direction and a sense of clarity when communicating the plan throughout the destination. Completion & Connection is no different than any other master plan when it comes to establishing time frames and potential benchmarks. Ultimately current conditions will largely influence implementation.

C. Conclusion

Salisbury-Rowan County is a destination that has collectively agreed that the tourism industry and the recruitment of visitors is a key component in the future of its local economy. When developing Completion & Connection multiple themes and strategies were presented by civic leaders, business leaders, community leaders and political leaders, but they all connected back to a central goal of economic prosperity through the continued growth and development of the visitor economy.

At the end of the day visitors fundamentally serve as the driver and end decision maker for the tourism industry, as they are the customers, whether visiting for business or leisure. It all begins with a visit.

Developing products and promotions that distinguish Salisbury-Rowan County and emphasize authenticity has been and will remain the basis for success. Research was clear that visitors are seeking authenticity they want to share with their friends and family and are interested in destinations

that are accommodating and friendly, Salisbury-Rowan can be that destination, over time.

The willingness of tourism and community leaders to embark on partnerships that have bridged perspectives and divides and culminate into a master plan for an entire sector of the economy demonstrates great potential. Completion & Connection recommends that those bridges become permanent and lasting in a manner that benefits all, grows the visitor economy and achieves the goal of doubling the economic impact of tourism in Salisbury-Rowan County.





2007
NIBC
Carson Cougars
Lake Norman Wildcats
Mooresville Blue Devils
NW Cabarrus Trojans
North Iredell Raiders
Statesville Greyhounds
West Iredell Warriors
West Rowan Falcons
Track & Field
CONFERENCE CHAMPIONSHIP



APPENDIX

- Strategic Implementation Board
- Acknowledgements
- Quantitative Research





STRATEGIC IMPLEMENTATION BOARD

Strategic Implementation Board

PHASE	OBJECTIVE	ACTION	
1 (Years 1-3)	Asset & Structural Development		
	1. Solidify a Lasting Administrative Structure	1A. Designate the CVB as a 501 C6 1B. Staff and Structure 1C. Set up Visitor Business Development Grants 1D. Refine the Salisbury-Rowan County Brand 1E. Shift to Digital Visitors Centers 1F. Refocus Visitor Marketing 1G. Create Marketing Strategy for the Arts	
	2. Establish Sustainable Partnerships	2A. Formalize Strategic Partnerships	
	3. Cultivate Business Economy and the Business Traveler	3A. Quality of Life & Economic Development 3B. Focus Support for Accommodations 3C. Business and Community Orientation 3D. Train Tourism-Related Businesses 3E. Promote Commercial Redevelopment	
	4. Establish 2 Flagships	4A. Downtown 4B. Agri-Scenic Outdoor	
	5. Establish 2 Collections	5A. Rail 5B. Light Adventure	
	2 (Years 3-5)	Infrastructure Improvement	
		1. Make Family Sports Facilities The 3rd Flagship	
		2. Bike Friendly Community	
		3. Designate and Develops Gateways	
		4. "Our Towns"	4A. Develop and Promote County Communities as Destinations
		5. Heritage Connections	
		6. Connect the Dots	6A. Scenic Byways 6B. Facilitate Winery Tours 6C. Local Cuisine/Wineries 6D. Town-Gown Connection 6E. Rail to the Mountains
		7. Continuation	
	3 (Years 5-10)	Secondary Development	
1. Destination Marketing, Management and Development			
2. Downtown Flagship Expansion			
3. Group and Conference Connection			
4. Business and Product Development			
5. Our Towns Expansion			
6. Dedication to the Creative Economy			
7. The Land and Light Adventure			

TIME FRAME	PROSPECTIVE PARTNERS*	NOTES
Year 1		Early implementation is recommended
Year 1-3		
Year 1-3	◇ □ □ ■	
Year 1	ALL PARTNERS	Recommend broad base input on branding process
Year 1-2	◇ □ ● □ □ □	Expands capacity to reach visitors
Year 1-2		Continue to build off of visitor related input
Year 2	◇ ● □ □ ○	Focus on best practices in other communities
Year 1-3	ALL PARTNERS	A must for long term success
Year 1-3	◇ □ ● □ ○	Support business, residential and retail growth
Year 1-3	□ □ □	Utilize input from lodging partners
Year 2	◇ □ ● □ ○	
Year 2	□ ● ○	Consider Outside Sources
Year 2-3	◇ □ □ ●	May provide chance for new occ. tax revenue
Year 1-3	○ ● ■ ■	Continue through the entire plan
Year 1-3	○ ● ■ ■	Continue through the entire plan
Year 3	◇ □ ● ◇ ○	Excellent area to differentiate
Year 3	■ □ ■	Speaks to the authentic nature of Rowan County
Year 4	□ ○ ■ □	Great for weekend visitors/competitive market
Year 4	■ □ ● ●	Look for avenues to connect with quality of life
Year 4-5	○ □ ●	Sometimes first impressions are everything
Year 3-5	○ ◇ □ ● ● ■	Focus on each town specific to its need
Year 3	◇ □ ●	
Year 4-5	● □ ○ ● ● ■ □	Connects well with light adventure and bicycle friendly
Year 3	● ■ □	
Year 3	● ■ □	
Year 5	□ ○ ● □ ● ○	Excellent opportunity to reach younger demographics
Year 5	□ ○ ● ●	
Year 3-5		
Year 5-10		
Year 7-10	◇ □ ● ◇ ○ □	
Year 7-10	◇ □ ● □ ◇	
Year 5-7	□ ○ □ ■ □ ◇ ■	
Year 5-10	○ ◇ □ ● □ ○ ● ■	
Year 7-10	● ○ ◇ ○	
Year 5-7	■ □ ■	

- Economic Development Commission
- ◇ Downtown Salisbury
- Education Institutions
- Arts Council & Affiliates
- City & County Recreation Depts.
- Area Lodging Properties
- ◇ Heritage Related Organizations
- Local Government (Municipalities)
- Transportation Organizations
- Land-Agrarian Related Businesses and Entities
- Visitor Related Businesses
- Chamber of Commerce

TIME FRAME
Year 1: January 2013
Year 1-3: January 2013 - December 2015
Year 3-5: January 2013 - December 2018
Year 5-10: January 2013 - December 2023

*The 2 TDA's have the overall responsibility for implementing the strategic plan

ACKNOWLEDGEMENTS

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QUANTITATIVE RESEARCH

Empirical Findings: Salisbury-Rowan County Project

Michael Dotson, DBA

Dinesh Dave, PH.D.

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Observations and Utility of Findings

- **Visitors and Prospects Want What We Have**
 - Visitors & Non-Visitors Vacation For The Same Reasons
 - They Rate And Rank Their Interests Similarly For This Visit
 - They Rate And Rank Interests Similarly For Future Visits

- **Congruence Between Visitor Desires and Salisbury-Rowan County Assets Suggests Viable Tourism Potential**

- **Interest/Asset Matches Suggest Specific Areas For Attention**

Salisbury-Rowan County Quantitative Study



■ Sources of Data:

- Face-to-Face “intercept” interviews with visitors (387)
 - At hotels, attractions and events throughout Rowan County
- Online questionnaires with visitors and enquirers (445)
- Online survey with non-visitors “cold sample” (489)
- TOTAL OF COMPLETED INTERVIEWS: 1,321

Table 1: General Demographics (N = 832)

DEMOGRAPHICS	CATEGORY	PERCENT
Gender	Female	67.8
	Male	32.2
Marital Status	Married	68.9
	Not Married	31.1
Age	18-24	3.8
	25-34	16.6
	35-44	20.6
	45-54	24.2
	55-64	23.7
	65 and Over	11.2
Education	High School	15.5
	Some College	34.9
	Bachelor's Degree	28.7
	Graduate/Professional Degree	20.9
Household Income	Less than \$25,000	11.5
	\$25,000 to \$49,999	25.8
	\$50,000 to \$74,999	22.2
	\$75,000 to \$99,999	20.1
	\$100,000 to \$124,999	9.2
	\$125,000 to \$149,999	5.4
	\$150,000 and Above	5.8
Average Number of People Living in the Home		2.85

Table 2: Residence Based Upon 3-Digit Zip Code (N = 832)



LOCATION	PERCENT
Charlotte, NC	40.5
Greensboro, NC	11.3
Missing	9.0
Raleigh, NC	3.2
Hickory, NC	3.1
Winston-Salem, NC	1.9
Fayetteville, NC	1.8
Baltimore, MD	1.7
Asheville, NC	1.4
Florence, SC	1.1
Northern, SC	1.1

Table 3: General Travel Behavior (N = 832)

VARIABLE	CATEGORY	PERCENT
Mode of Transportation	Private Car	87.9
	Bus	1.1
	Rail	1.5
	Air	3.7
	Air Plus Car Rental	4.3
	Other	1.6
TRIP INFORMATION		AVERAGE
Average Number of Day Trips		10.48
Average Amount Spent on a Typical Day Trip		\$172.62
Average Amount Spent on a Typical Day Trip per Person		\$54.63
Average Number of Overnight Trips		5.53
Average Amount Spent on a Typical Overnight Trip		\$408.76
Average Amount Spent on a Typical Overnight Trip per Person		\$131.62
Average Number of People in a Typical Trip		3.16
WHEN I GO ON AN OVERNIGHT TRIP, I AM LIKELY TO STAY AT THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>		AVERAGE
Moderately Priced Hotel		3.60
Full-service Hotel		3.60
Stay with Family/Friends		2.99
Inn/Guest House		2.69
Economy Motel		2.66
Bed & Breakfast		2.63
Limited Service Hotel		2.62
Rental Condo		2.56
Campground		2.28
RV Park		1.88

Table 4: Travel Motivations (N = 832)



I GO ON TRIPS PRIMARILY FOR THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	AVERAGE
Relaxation/Escape	4.48
Spending Time with Family/Friends	4.41
Experiencing Nature/Outdoor Activity	3.93
Festivals & Events	3.70
History & Heritage	3.65
Local Foods	3.45
Arts/Theater, Culture	3.24
Experiencing Small Town Life	3.09
Education	3.09
Agri-Tourism	2.58
Nightlife	2.42

Table 5: Trip Activities Ratings for Current and Future Trips (N = 832)

CURRENT TRIP	
I GO TO SALISBURY /ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES	AVERAGE
Festivals & Events	3.81
Accommodating /Friendly People	3.63
Outdoor Activities	3.53
Historical Sites/District	3.49
Eating Out	3.47
Downtown Activities	3.26
Railroad Travel/History	3.22
Museums	3.20
Shopping	3.10
Arts & Cultural Events	3.05
Antiques	2.82
Concerts/Music Events	2.81
Full-Service Hotel	2.45
Hiking/Biking	2.30
Pet Friendly Locations	2.29
Athletic/Team Sports	2.23
Nightlife	2.06
Auto Racing	2.01
Meeting/Conventions	2.00
Golf/Tennis	1.91

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

FUTURE TRIP	
I GO TO SALISBURY /ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES	AVERAGE
Festivals & Events	4.15
Accommodating /Friendly People	4.02
Eating Out	3.89
Downtown Activities	3.85
Outdoor Activities	3.84
Historical Sites/District	3.78
Shopping	3.68
Museums	3.61
Arts & Cultural Events	3.61
Concerts/Music Events	3.54
Railroad Travel/History	3.51
Antiques	3.20
Full-Service Hotel	3.14
Hiking/Biking	2.89
Pet Friendly Locations	2.78
Nightlife	2.66
Athletic/Team Sports	2.63
Auto Racing	2.38
Meeting/Conventions	2.34
Golf/Tennis	2.22

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

Table 6: Overall Satisfaction with Salisbury/Rowan County Experience (N = 832)



WITH RESPECT TO THE TOURISM ELEMENTS OF THE SALISBURY/ROWAN COUNTY EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	AVERAGE
Quality at a given price	3.85
Service & support	3.84
Interesting things to do	3.91
Overall satisfaction	4.04
I intend to return to this destination	4.15
I would recommend this destination to a friend or relative	4.18
Will be willing to use high speed rail, if available	3.75

Table 7: T-Test Comparing Trip Experience and “Would Like to See in the Future” (N = 832)

VARIABLE	CURRENT VISIT MEAN	FUTURE VISIT MEAN	tSTATISTIC	SIG.
Shopping	3.10	3.68	11.486	0.000
Historical Sites/District	3.49	3.78	6.048	0.000
Museums	3.20	3.61	9.655	0.000
Golf/Tennis	1.91	2.22	7.283	0.000
Hiking/Biking	2.30	2.89	12.246	0.000
Nightlife	2.06	2.66	12.345	0.000
Concerts/Music Events	2.81	3.54	14.864	0.000
Arts & Cultural Events	3.05	3.61	11.362	0.000
Antiques	2.82	3.20	8.208	0.000
Eating Out	3.47	3.89	9.543	0.000
Festivals & Events	3.81	4.15	7.608	0.000
Outdoor Activities	3.53	3.84	6.903	0.000
Meeting/Conventions	2.00	2.34	6.430	0.000
Pet Friendly Locations	2.29	2.78	10.230	0.000
Auto Racing	2.01	2.38	6.988	0.000
Full-Service Hotel	2.45	3.14	13.215	0.000
Downtown Activities	3.26	3.85	12.660	0.000
Railroad Travel/History	3.22	3.51	5.618	0.000
Athletic/Team Sports	2.23	2.63	8.637	0.000
Accommodating /Friendly People	3.63	4.02	8.351	0.000

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

Table 8: Aggregated Satisfaction Scale (N = 832)



WITH RESPECT TO THE TOURISM ELEMENTS OF THE SALISBURY/ROWAN COUNTY EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	CHRONBACH α , IF ITEM DELETED
Quality at a given price	0.928
Service & support	0.922
Interesting things to do	0.917
Overall satisfaction	0.914
I intend to return to this destination	0.923
I would recommend this destination to a friend or relative	0.921
Overall Chronbach α	0.933

Table 9: Results of Cluster Analysis Using Aggregated Satisfaction Scale (N = 832)

CLUSTER VARIABLE	CLUSTER 1 HIGH SATISFACTION		CLUSTER 2 MODERATE SATISFACTION		CLUSTER 3 LOW SATISFACTION	
	CLUSTER MEAN	PERCENT OF SAMPLE	CLUSTER MEAN	PERCENT OF SAMPLE	MEAN	PERCENT OF SAMPLE
AGGREGATED SATISFACTION SCALE	4.51	61.6%	3.34	32.3%	2.29	6.1%

All cluster solutions are significant at p-value of 0.05

Table 10: Demographic Profile Across Three Clusters (N = 832)



DEMOGRAPHICS	CATEGORY	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Gender	Female	70.6%	60.1%	69.8%
	Male	29.4%	39.9%	30.2%
Marital Status	Married	68.3%	71.7%	66.7%
	Not Married	31.7%	28.3%	33.3%
Age	18-24	3.0%	4.0%	9.5%
	25-34	16.7%	16.0%	16.7%
	35-44	19.0%	24.4%	23.8%
	45-54	24.8%	26.2%	16.7%
	55-64	24.3%	20.0%	19.0%
	65 and Over	12.3%	9.3%	14.3%
Education	High School	15.8%	12.4%	28.6%
	Some College	36.3%	31.6%	42.9%
	Bachelor's Degree	27.9%	33.3%	21.4%
	Graduate/Professional Degree	20.0%	22.7%	4.0%
Household Income	Less than \$25,000	11.2%	8.1%	25.6%
	\$25,000 to \$49,999	28.0%	21.4%	28.2%
	\$50,000 to \$74,999	22.1%	24.3%	15.4%
	\$75,000 to \$99,999	18.9%	24.8%	12.8%
	\$100,000 to \$124,999	9.7%	8.6%	7.7%
	\$125,000 to \$149,999	4.7%	5.7%	2.6%
	\$150,000 and Above	5.5%	7.1%	7.7%
Average Number of People Living in the Home		2.79	2.98	3.24

Table 11: General Travel Behavior by Cluster (N = 832)

VARIABLE	CATEGORY	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Mode of Transportation	Private Car	88.6%	86.1%	85.0%
	Bus	1.2%	1.3%	0.0%
	Rail	1.9%	1.3%	0.0%
	Air	3.0%	4.5%	5.0%
	Air Plus Car Rental	3.5%	6.3%	5.0%
	Other	1.9%	0.4%	5.0%
TRIP INFORMATION		AVERAGE	AVERAGE	AVERAGE
Average Number of Day Trips		10.87	9.37	11.0
Average Amount Spent on a Typical Day Trip		\$173.73	\$176.98	\$214.86
Average Amount Spent on a Typical Day Trip per Person		\$54.80	\$53.63	\$74.60
Average Number of Overnight Trips		5.27	5.78	6.59
Average Amount Spent on a Typical Overnight Trip		\$419.60	\$422.03	\$407.14
Average Amount Spent on a Typical Overnight Trip per Person		\$132.37	\$127.89	\$141.37
Average Number of People in a Typical Trip		3.17	3.30	2.88
WHEN I GO ON AN OVERNIGHT TRIP, I AM LIKELY TO STAY AT THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>		AVERAGE	AVERAGE	AVERAGE
Bed & Breakfast		2.74	2.50	2.35
Economy Motel		2.77	2.49	2.42
Moderately Priced Hotel		3.72*	3.45**	3.03**
Limited Service Hotel		2.67	2.56	2.44
Full-service Hotel		3.61	3.60	3.51
Inn/Guest House		2.77**	2.55**	2.32**
Rental Condo		2.56	2.60	2.34
Campground		2.37	2.12	2.25
RV Park		1.94	1.76	2.15
Stay with Family/Friends		3.09	2.72	2.90
Same number of * represent homogeneity across groups				

Table 12: Travel Motivations By Cluster (N = 832)



I GO ON TRIPS PRIMARILY FOR THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Education	2.52*	2.85**	3.23***
Experiencing Nature/Outdoor Activity	4.09*	3.74**	3.62**
Relaxation/Escape	4.57*	4.40**	4.29**
Spending Time with Family/Friends	4.53**	4.27**	3.98*
Nightlife	2.40	2.46	2.43
Festivals & Events	3.85*	3.49**	3.57**
History & Heritage	3.80*	3.47**	3.10**
Local Foods	3.63*	3.27**	3.17***
Agri-Tourism	2.71	2.43	2.38
Experiencing Small Town Life	3.29*	2.77**	2.76**
Arts/Theater, Culture	3.36*	3.06**	2.76**
<i>Same number of * represent homogeneity across groups</i>			

Table 13: Trip Activities Ratings for Current Trip By Cluster (N = 832)

I GO TO SALISBURY/ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Shopping	3.34*	2.71**	2.79**
Historical Sites/Districts	3.80*	3.12**	2.56***
Museums	3.48*	2.90**	2.44**
Golf/Tennis	1.86	2.00	1.79
Hiking/Biking	2.38*	2.23**	1.89**
Nightlife	2.07**	2.05**	1.66*
Concerts/Music Events	3.02*	2.59**	2.13***
Art & Cultural Events	3.35*	2.80**	2.21***
Antiques	3.05*	2.54**	2.37**
Eating Out	3.72*	3.11**	2.95**
Festivals & Events	4.02*	3.45**	3.26**
Outdoor Activities	3.73*	3.24**	3.21**
Meeting/Conventions	1.98	1.98	2.03
Pet Friendly Locations	2.35	2.24	2.08
Auto Racing	2.04	1.98	2.00
Full-Service Hotel	2.53	2.32	2.23
Downtown Activities	3.56*	2.83**	2.64**
Railroad Travel/History	3.49*	2.86**	2.66**
Athletic/Team Sports	2.23	2.19	2.46
Accommodating/Friendly People	4.01*	3.10**	2.79**

*Same number of * represent homogeneity across groups*

Table 14: Trip Activities Ratings Respondents Would Like to See In Future By Cluster (N = 832)

I WOULD LIKE TO SEE IN FUTURE VISITS TO SALISBURY/ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Shopping	3.84*	3.47**	3.18**
Historical Sites/Districts	4.00*	3.57**	2.92***
Museums	3.83*	3.33**	2.84***
Golf/Tennis	2.16**	2.34**	1.92*
Hiking/Biking	2.90*	2.97*	2.44**
Nightlife	2.68	2.61	2.39
Concerts/Music Events	3.71*	3.37**	2.85**
Art & Cultural Events	3.82*	3.40**	2.67***
Antiques	3.38*	2.99**	2.62**
Eating Out	4.10*	3.61**	3.55**
Festivals & Events	4.35*	3.85**	3.61**
Outdoor Activities	4.01*	3.64**	3.46**
Meeting/Conventions	2.34	2.31	2.03
Pet Friendly Locations	2.87*	2.72*	2.24**
Auto Racing	2.42*	2.36*	1.82**
Full-Service Hotel	3.20*	3.08*	2.67**
Downtown Activities	4.13*	3.49**	2.95***
Railroad Travel/History	3.75*	3.19**	2.72**
Athletic/Team Sports	2.66	2.58	2.46
Accommodating/Friendly People	4.30*	3.65**	3.38**

*Same number of * represent homogeneity across groups*

Table 15: Overall Satisfaction with Salisbury/Rowan County Experience By Cluster (N = 832)

WITH RESPECT TO THE TOURISM ELEMENTS OF THE SALISBURY/ROWAN COUNTY EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Quality at a given price	4.33*	3.23**	2.37***
Service & support	4.37*	3.17**	2.19***
Interesting things to do	4.46*	3.27**	1.91***
Overall satisfaction	4.54*	3.42**	2.30**
I intend to return to this destination	4.65*	3.48**	2.53***
I would recommend this destination to a friend or relative	4.71*	3.48**	2.47***
Will be willing to use high speed rail, if available	4.03*	3.42**	2.67***

*Same number of * represent homogeneity across groups*

Table 16: Results of Factor Analysis for Trip Activities Ratings for Current Trip (N = 832)



FACTOR	I GO TO SALISBURY/ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES	FACTOR LOADING
Factor 1: Sports & Social Activities	Golf/Tennis	0.764
	Hiking/Biking	0.576
	Nightlife	0.683
	Meeting/Conventions	0.713
	Pet Friendly Locations	0.623
	Auto Racing	0.762
	Full-Service Hotel	0.539
	Athletic/Team Sports	0.758
Factor 2: Events	Concerts/Music Events	0.696
	Arts & Cultural Events	0.744
	Festivals & Events	0.687
	Outdoor Activities	0.630
Factor 3: Service Oriented	Shopping	0.744
	Eating Out	0.749
	Downtown Activities	0.604
	Accommodating/Friendly People	0.592
Factor 4: History & Museums	Historical Sites/Districts	0.788
	Museums	0.854
	Railroad Travel/History	0.747

Table 17: Results of Stepwise Regression Analysis for Factors of Trip Activities Ratings for Current Trip with Trip Satisfaction Factor (N = 832)

DEPENDENT VARIABLE	INDEPENDENT VARIABLE	COEFFICIENT	t-STATIC	SIG.
TRIP SATISFACTION FACTOR	Constant	2.465	20.156	0.000
	Factor 1: Sports & Social Activities	-0.136	-3.575	0.000
	Factor 2: Events	0.174	4.297	0.000
	Factor 3: Service Oriented	0.158	5.280	0.000
	Factor 4: History & Museums	0.214	5.106	0.000

Table 18: Results of Factor Analysis for Trip Activities Ratings Respondents Would Like to See in Future (N = 832)

FACTOR	I GO TO SALISBURY/ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES	FACTOR LOADING
Factor 1: Sports & Social Activities	Golf/Tennis	0.785
	Nightlife	0.582
	Meeting/Conventions	0.720
	Pet Friendly Locations	0.547
	Auto Racing	0.795
	Athletic/Team Sports	0.774
Factor 2: History, Museums, Antiques	Historical Sites/Districts	0.845
	Museums	0.834
	Antiques	0.529
	Railroad Travel/History	0.751
Factor 3: Service Oriented	Shopping	0.657
	Eating Out	0.727
	Downtown Activities	0.655
	Accommodating/Friendly People	0.555
Factor 4: Events and Outdoor	Hiking/Biking	0.594
	Concerts/Music Events	0.678
	Festivals & Events	0.609
	Outdoor Activities	0.666
	Arts & Cultural Events	0.641

Table 19:

Results of Stepwise Regression Analysis for Factors of Trip Activities Ratings for Respondents Would Like to See in Future with Trip Satisfaction Factor (N = 832)

DEPENDENT VARIABLE	INDEPENDENT VARIABLE	COEFFICIENT	t-STATIC	SIG.
TRIP SATISFACTION FACTOR	Constant	2.280	15.560	0.000
	Factor 1: Sports & Social Activities	-0.078	-2.415	0.016
	Factor 2: History, Museums, Antiques	0.213	5.787	0.000
	Factor 3: Service Oriented	0.299	7.235	0.000



Empirical Findings: Salisbury-Rowan County Project

COLD SAMPLE

Table 1: General Demographics (N = 489)

DEMOGRAPHICS	CATEGORY	PERCENT
Gender	Female	69.3
	Male	30.7
Marital Status	Married	61.7
	Not Married	38.3
Age	18-24	4.0
	25-34	16.2
	35-44	18.7
	45-54	27.9
	55-64	24.5
	65 and Over	8.7
Education	High School	10.6
	Some College	29.4
	Bachelor's Degree	35.7
	Graduate/Professional Degree	24.3
Household Income	Less than \$25,000	5.0
	\$25,000 to \$49,999	20.1
	\$50,000 to \$74,999	23.3
	\$75,000 to \$99,999	21.0
	\$100,000 to \$124,999	12.4
	\$125,000 to \$149,999	7.9
	\$150,000 and Above	10.2
Average Number of People Living in the Home		2.56

Table 2: Residence Based Upon 3-Digit Zip Code (N = 489)



LOCATION	PERCENT
Charlotte, NC	20.2
Baltimore, MD	4.9
Greenville, SC	2.1
Asheville, NC	1.6
Fall River, MA	1.6
Greensboro, NC	1.6
Milwaukee, WI	1.6
Raleigh, NC	1.6
Fayetteville, NC	1.4
Charleston, SC	1.2
Columbia, SC	1.2
Detroit, MI	1.2
northern SC	1.2
Orlando, FL	1.2
Atlanta, GA	0.9
Birmingham, AL	0.9
Camden, AR	0.9
Columbus, OH	0.9
Harrisburg, PA	0.9
North metro, GA	0.9
Saint Louis, MO	0.9
Westchester, NY	0.9

Table 3: General Travel Behavior (N = 489)

VARIABLE	CATEGORY	PERCENT
Mode of Transportation	Private Car	58.9
	Bus	1.5
	Rail	1.0
	Air	24.3
	Air Plus Car Rental	8.3
	Car Rental	3.9
	Other	2.1
TRIP INFORMATION		AVERAGE
Average Number of Day Trips		11.06
Average Amount Spent on a Typical Day Trip		\$252.47
Average Amount Spent on a Typical Day Trip per Person		\$93.51
Average Number of Overnight Trips		6.81
Average Amount Spent on a Typical Overnight Trip		\$731.81
Average Amount Spent on a Typical Overnight Trip per Person		\$271.04
Average Number of People in a Typical Trip		2.70
WHEN I GO ON AN OVERNIGHT TRIP, I AM LIKELY TO STAY AT THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>		AVERAGE
Full-service Hotel		3.79
Moderately Priced Hotel		3.74
Stay with Family/Friends		2.97
Limited Service Hotel		2.69
Rental Condo		2.63
Inn/Guest House		2.47
Economy Motel		2.45
Bed & Breakfast		2.42
Campground		1.69
RV Park		1.36

Table 4: Travel Motivations (N = 489)



I GO ON TRIPS PRIMARILY FOR THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	AVERAGE
Relaxation/Escape	4.54
Spending Time with Family/Friends	4.28
Experiencing Nature/Outdoor Activity	3.61
Festivals & Events	3.56
Local Foods	3.52
History & Heritage	3.40
Arts/Theater, Culture	3.25
Education	2.75
Experiencing Small Town Life	2.62
Nightlife	2.45
Agri-Tourism	2.15

Table 5: Trip Activities Ratings for Current and Future Trips (N = 489)

CURRENT TRIP	
I WENT TO MY MOST RECENT VACATION DESTINATION TO ENJOY THE FOLLOWING ACTIVITIES	FUTURE TRIP
Accommodating /Friendly People	3.83
Eating Out	3.82
Outdoor Activities	3.51
Downtown Activities	3.39
Festivals & Events	3.38
Historical Sites/District	3.35
Full-Service Hotel	3.29
Shopping	3.06
Museums	2.91
Arts & Cultural Events	2.82
Concerts/Music Events	2.67
Athletic/Team Sports	2.28
Nightlife	2.26
Hiking/Biking	2.17
Railroad Travel/History	2.14
Meeting/Conventions	1.91
Antiques	1.89
Pet Friendly Locations	1.82
Auto Racing	1.81
Golf/Tennis	1.61

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

FUTURE TRIP	
I WENT TO MY MOST RECENT VACATION DESTINATION TO ENJOY THE FOLLOWING ACTIVITIES	FUTURE TRIP
Accommodating /Friendly People	4.17
Eating Out	3.99
Festivals & Events	3.82
Downtown Activities	3.77
Outdoor Activities	3.74
Full-Service Hotel	3.69
Historical Sites/District	3.66
Shopping	3.35
Museums	3.34
Concerts/Music Events	3.32
Arts & Cultural Events	3.30
Athletic/Team Sports	2.79
Hiking/Biking	2.72
Nightlife	2.67
Railroad Travel/History	2.63
Antiques	2.29
Pet Friendly Locations	2.17
Auto Racing	2.15
Meeting/Conventions	1.96
Golf/Tennis	1.92

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

Table 6: Overall Satisfaction with Travel Experience (N = 489)



WITH RESPECT TO MY MOST RECENT VACATION TRAVEL DESTINATION EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	AVERAGE
Quality at a given price	4.17
Service & support	4.07
Interesting things to do	4.32
Overall satisfaction	4.37
I intend to return to this destination	4.20
I would recommend this destination to a friend or relative	4.39
Will be willing to use high speed rail, if available	3.64

Table 7: T-Test Comparing Trip Experience and “Would Like to See in the Future” (N = 489)

VARIABLE	CURRENT VISIT MEAN	FUTURE VISIT MEAN	tSTATISTIC	SIG.
Shopping	3.06	3.35	5.925	0.000
Historical Sites/District	3.35	3.66	5.762	0.000
Museums	2.91	3.34	7.134	0.000
Golf/Tennis	1.61	1.92	6.432	0.000
Hiking/Biking	2.17	2.72	9.522	0.000
Nightlife	2.26	2.67	8.240	0.000
Concerts/Music Events	2.67	3.32	12.279	0.000
Arts & Cultural Events	2.82	3.30	8.968	0.000
Antiques	1.89	2.29	8.887	0.000
Eating Out	3.82	3.99	3.856	0.000
Festivals & Events	3.38	3.82	7.968	0.000
Outdoor Activities	3.51	3.74	4.519	0.000
Meeting/Conventions	1.91	1.96	1.226	0.221
Pet Friendly Locations	1.82	2.17	6.942	0.000
Auto Racing	1.81	2.15	7.018	0.000
Full-Service Hotel	3.29	3.69	7.432	0.000
Downtown Activities	3.39	3.77	7.246	0.000
Railroad Travel/History	2.14	2.63	8.874	0.000
Athletic/Team Sports	2.28	2.79	8.928	0.000
Accommodating /Friendly People	3.83	4.17	7.174	0.000

Scale: 1 = Strongly Disagree and 5 = Strongly Agree

Table 8: Aggregated Satisfaction Scale (N = 489)



WITH RESPECT TO MY MOST RECENT VACATION TRAVEL DESTINATION EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	CHRONBACH α , IF ITEM DELETED
Quality at a given price	0.844
Service & support	0.845
Interesting things to do	0.834
Overall satisfaction	0.818
I intend to return to this destination	0.844
I would recommend this destination to a friend or relative	0.816
Overall Chronbach α	0.857

Table 9: Results of Cluster Analysis Using Aggregated Satisfaction Scale (N = 489)

CLUSTER VARIABLE	CLUSTER 1 HIGH SATISFACTION		CLUSTER 2 MODERATE SATISFACTION		CLUSTER 3 LOW SATISFACTION	
	CLUSTER MEAN	PERCENT OF SAMPLE	CLUSTER MEAN	PERCENT OF SAMPLE	MEAN	PERCENT OF SAMPLE
AGGREGATED SATISFACTION SCALE	4.712	54.6%	3.879	38.7%	2.683	6.7%

All cluster solutions are significant at p-value of 0.05

Table 10: Demographic Profile Across Three Clusters (N = 489)



DEMOGRAPHICS	CATEGORY	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Gender	Female	71.5	68.4	67.7
	Male	28.5	31.6	32.3
Marital Status	Married	61.9	61.8	75.9
	Not Married	38.1	38.2	24.1
Age	18-24	4.4	3.4	3.2
	25-34	12.7	20.5	22.6
	35-44	18.3	19.9	16.1
	45-54	28.3	28.4	29.0
	55-64	28.3	19.3	29.0
	65 and Over	8.0	8.5	0.0
Education	High School	11.3	7.5	25.8
	Some College	31.6	27.0	19.4
	Bachelor's Degree	33.2	38.5	41.9
	Graduate/Professional Degree	23.9	27.0	12.9
Household Income	Less than \$25,000	5.4	6.0	0.0
	\$25,000 to \$49,999	19.6	18.6	32.1
	\$50,000 to \$74,999	24.6	23.4	17.9
	\$75,000 to \$99,999	20.5	21.6	7.1
	\$100,000 to \$124,999	13.4	9.6	17.9
	\$125,000 to \$149,999	4.0	13.8	10.7
	\$150,000 and Above	12.5	7.2	14.3
Average Number of People Living in the Home		2.53	2.66	2.67

Table 11: General Travel Behavior by Cluster (N = 489)

VARIABLE	CATEGORY	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Mode of Transportation	Private Car	57.0	62.1	74.2
	Bus	0.8	1.1	3.2
	Rail	1.2	1.1	12.9
	Air	25.9	23.7	3.2
	Air Plus Car Rental	8.4	7.9	3.2
	Car Rental	4.8	1.7	74.2
	Other	2.0	1.7	74.2
TRIP INFORMATION		AVERAGE	AVERAGE	AVERAGE
Average Number of Day Trips		11.46	10.21	15.81
Average Amount Spent on a Typical Day Trip		\$244.93	\$214.75	\$466.17
Average Amount Spent on a Typical Day Trip per Person		\$89.39	\$81.34	\$170.76
Average Number of Overnight Trips		6.95	6.30	8.81
Average Amount Spent on a Typical Overnight Trip		\$802.58	\$668.59	\$467.67
Average Amount Spent on a Typical Overnight Trip per Person		\$292.91	\$253.25	\$171.31
Average Number of People in a Typical Trip		2.74	2.64	2.73
WHEN I GO ON AN OVERNIGHT TRIP, I AM LIKELY TO STAY AT THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>		AVERAGE	AVERAGE	AVERAGE
Bed & Breakfast		2.48	2.22	2.68
Economy Motel		2.48	2.46	2.23
Moderately Priced Hotel		3.79	3.74	3.43
Limited Service Hotel		2.80	2.68	2.13
Full-service Hotel		3.99	3.53	3.53
Inn/Guest House		2.55	2.38	2.29
Rental Condo		2.70	2.52	2.70
Campground		1.65	1.63	2.30
RV Park		1.35	1.30	1.83
Stay with Family/Friends		3.07	2.85	2.70
<i>Same number of * represent homogeneity across groups</i>				

Table 12: Travel Motivations By Cluster (N = 489)



I GO ON TRIPS PRIMARILY FOR THE FOLLOWING <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Education	2.11	2.80	2.45
Experiencing Nature/Outdoor Activity	3.75*	3.49*	3.06**
Relaxation/Escape	4.64*	4.44*	4.17**
Spending Time with Family/Friends	4.37	4.19	4.13
Nightlife	2.59	2.27	2.27
Festivals & Events	3.75*	3.39**	3.00**
History & Heritage	3.46*	3.30*	3.03**
Local Foods	3.65	3.32	3.53
Agri-Tourism	2.22	2.06	2.20
Experiencing Small Town Life	2.80	2.40	2.48
Arts/Theater, Culture	3.37*	3.14*	2.74**
<i>Same number of * represent homogeneity across groups</i>			

Table 13: Trip Activities Ratings for Current Trip By Cluster (N = 489)

I WENT TO MY MOST RECENT VACATION DESTINATION TO ENJOY THE FOLLOWING ACTIVITIES <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Shopping	3.08	3.04	2.81
Historical Sites/Districts	3.45	3.17	3.16
Museums	2.99	2.77	2.57
Golf/Tennis	1.60	1.61	1.77
Hiking/Biking	2.26	2.09	1.90
Nightlife	2.35	2.09	2.30
Concerts/Music Events	2.75*	2.62*	2.16**
Art & Cultural Events	2.91*	2.71*	2.26**
Antiques	1.96*	1.73**	2.16*
Eating Out	3.96	3.66	3.61
Festivals & Events	3.56*	3.19*	3.03**
Outdoor Activities	3.71	3.28	3.40
Meeting/Conventions	1.93	1.88	1.57
Pet Friendly Locations	1.84	1.76	2.00
Auto Racing	1.88	1.72	1.97
Full-Service Hotel	3.47*	3.05*	2.93**
Downtown Activities	3.52*	3.22*	2.87**
Railroad Travel/History	2.24	1.99	1.90
Athletic/Team Sports	2.37*	2.24*	1.86**
Accommodating/Friendly People	4.09*	3.61**	3.23**

*Same number of * represent homogeneity across groups*

Table 14: Trip Activities Ratings Respondents Would Like to See In Future By Cluster (N = 489)

I WOULD LIKE TO SEE FOR FUTURE VISITS THE FOLLOWING ACTIVITIES <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Shopping	3.40	3.29	3.30
Historical Sites/Districts	3.74	3.49	3.70
Museums	3.42	3.18	3.26
Golf/Tennis	1.92*	1.84*	2.41**
Hiking/Biking	2.81	2.65	2.44
Nightlife	2.83	2.47	2.50
Concerts/Music Events	3.46*	3.22*	2.73**
Art & Cultural Events	3.48*	3.14*	2.56**
Antiques	2.38	2.12	2.42
Eating Out	4.12	3.83	3.80
Festivals & Events	4.00	3.62	3.65
Outdoor Activities	3.94	3.53	3.56
Meeting/Conventions	1.98	1.99	1.60
Pet Friendly Locations	2.18	2.11	2.32
Auto Racing	2.20*	2.04*	2.72**
Full-Service Hotel	3.84	3.49	3.67
Downtown Activities	3.95*	3.57*	3.40**
Railroad Travel/History	2.74	2.47	2.56
Athletic/Team Sports	2.87	2.75	2.32
Accommodating/Friendly People	4.38*	3.96*	3.80**

*Same number of * represent homogeneity across groups*

Table 15: Overall Satisfaction with Vacation Experience By Cluster (N = 489)

WITH RESPECT TO MY MOST RECENT VACATION EXPERIENCE <i>(Scale: 1 = Strongly Disagree and 5 = Strongly Agree)</i>	HIGH SATISFACTION CLUSTER	MODERATE SATISFACTION CLUSTER	LOW SATISFACTION CLUSTER
Quality at a given price	4.56*	3.85**	2.87***
Service & support	4.49*	3.65**	2.81***
Interesting things to do	4.75*	3.99**	2.87***
Overall Satisfaction	4.79*	4.02**	3.03**
I intend to return to this destination	4.77*	3.75**	2.13***
I would recommend this destination to a friend or relative	4.90*	4.00**	2.39***
Will be willing to use high speed rail, if available	3.90*	3.47**	2.55***

*Same number of * represent homogeneity across groups*

Table 16: Results of Factor Analysis for Trip Activities Ratings for Current Trip (N = 489)

FACTOR	I WENT TO MY MOST RECENT VACATION DESTINATION TO ENJOY THE FOLLOWING ACTIVITIES	FACTOR LOADING
Factor 1: History, Museum, Antiques	Historical Sites/District	0.842
	Museums	0.626
	Antiques	0.548
	Railroad Travel/History	0.503
Factor 2: Service Oriented	Shopping	0.530
	Eating Out	0.676
	Full-Service Hotel	0.698
	Downtown Activities	0.597
	Accommodating/Friendly People	0.620
Factor 3: Events & Nightlife	Nightlife	0.702
	Concerts/Music Events	0.814
	Arts & Cultural Events	0.603
	Festivals & Events	0.591
Factor 4: Outdoor	Hiking/Biking	0.807
	Outdoor Activities	0.767

Table 17: Results of Stepwise Regression Analysis for Factors of Trip Activities Ratings for Current Trip with Trip Satisfaction Factor (N = 489)

DEPENDENT VARIABLE	INDEPENDENT VARIABLE	COEFFICIENT	t-STATIC	SIG.
TRIP SATISFACTION FACTOR	Constant	3.432	22.339	0.000
	Factor 2. Service Oriented	0.162	4.372	0.000
	Factor 4: Outdoor	0.089	3.065	0.002

Table 18: Results of Factor Analysis for Trip Activities Ratings Respondents Would Like to See in Future (N = 489)

FACTOR	I GO TO SALISBURY/ROWAN COUNTY FOR THE FOLLOWING ACTIVITIES	FACTOR LOADING
Factor 1: Service Oriented	Shopping	0.507
	Eating Out	0.690
	Full-Service Hotel	0.669
	Downtown Activities	0.608
	Accommodating/Friendly People	0.634
Factor 2: Arts, Music, Nightlife	Nightlife	0.652
	Concerts/Music Events	0.791
	Arts & Cultural Events	0.670
Factor 3: Museums and History	Historical Sites/Districts	0.866
	Museums	0.846
	Railroad Travel/History	0.579
Factor 4: Outdoor	Hiking/Biking	0.793
	Outdoor Activities	0.804

Table 19:

Results of Stepwise Regression Analysis for Factors of Trip Activities Ratings for Respondents Would Like to See in Future with Trip Satisfaction Factor (N = 832)

DEPENDENT VARIABLE	INDEPENDENT VARIABLE	COEFFICIENT	t-STATIC	SIG.
TRIP SATISFACTION FACTOR	Constant	3.344	18.986	0.000
	Factor 1: Service Oriented	0.168	3.278	0.001
	Factor 2: Arts, Music, Nightlife	0.089	2.350	0.019

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