



### 2009 Rock Slide Research

The Division of Tourism, the Asheville CVB and Biltmore Company contracted with TNS to conduct research to gauge the awareness of the October 2009 I-40 rock slide in key markets. TNS is the world's largest custom market research company, providing market research expertise across a broad variety of business sectors in 75 countries around the world.

In addition to measuring awareness and perception of the rock slide location and its impact on travel, the TNS research also gathered data on the potential impact on travel to the Asheville area and the entire western North Carolina region. This data will help evaluate message strategy statements for future promotion of the region as the roadway is being repaired.

Using TNS' 6<sup>th</sup> Dimension Panel, 1,000 completed surveys were fielded in early November in key markets. These markets include Atlanta, Knoxville, Columbia, Greenville/Spartanburg, Raleigh, Charlotte, and Greensboro/Winston-Salem. A summary of findings is below.

#### All Markets

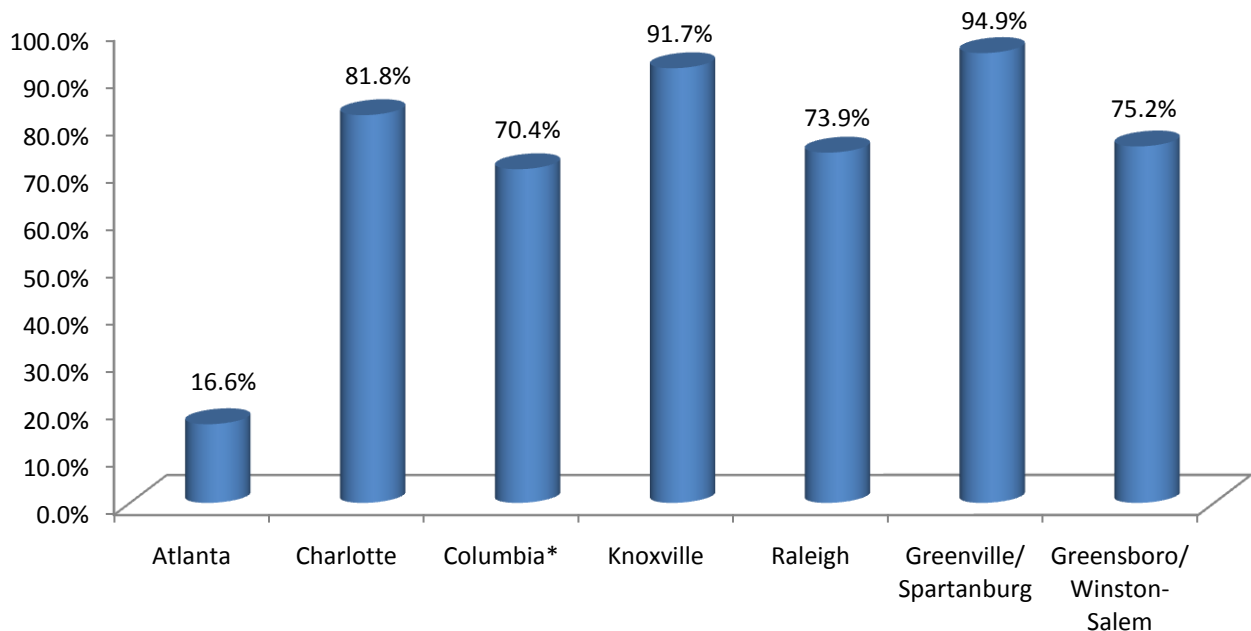
- Nearly two-thirds (65.0%) of all respondents are aware of the rock slide. Most of those aware (82%) correctly think that the rock slide is located in North Carolina, near the Tennessee border.
- With regards to the perception of how the rock slide will affect respondents travel to the North Carolina mountains, thirty-eight percent of respondents agreed that the rock slide would be a major inconvenience and that it would make it more difficult for them to get to their destination.
- Forty-four percent of respondents from all markets agreed that the rock slide would create traffic or delays on their normal or alternate route, while forty-six of respondents agreed that the rock slide would cause them to take an alternate route.
- Forty percent of respondents indicated that the rock slide would have no impact on their travel plans.
- With confirmation of the specific location of the rock slide, over eighty percent (82.1%) of respondents responded that they were no more or less likely to visit the North Carolina mountains in the next six months.

## Specific Markets

- **Awareness of rock slide**

- Over ninety (91.7%) percent of Knoxville respondents are aware of the rock slide, while only seventeen percent of Atlanta respondents are aware. Other markets showed high awareness. See below chart.

**Awareness of Rock Slide by Market**



\* denotes small sample size

- **Correct knowledge of rock slide location**

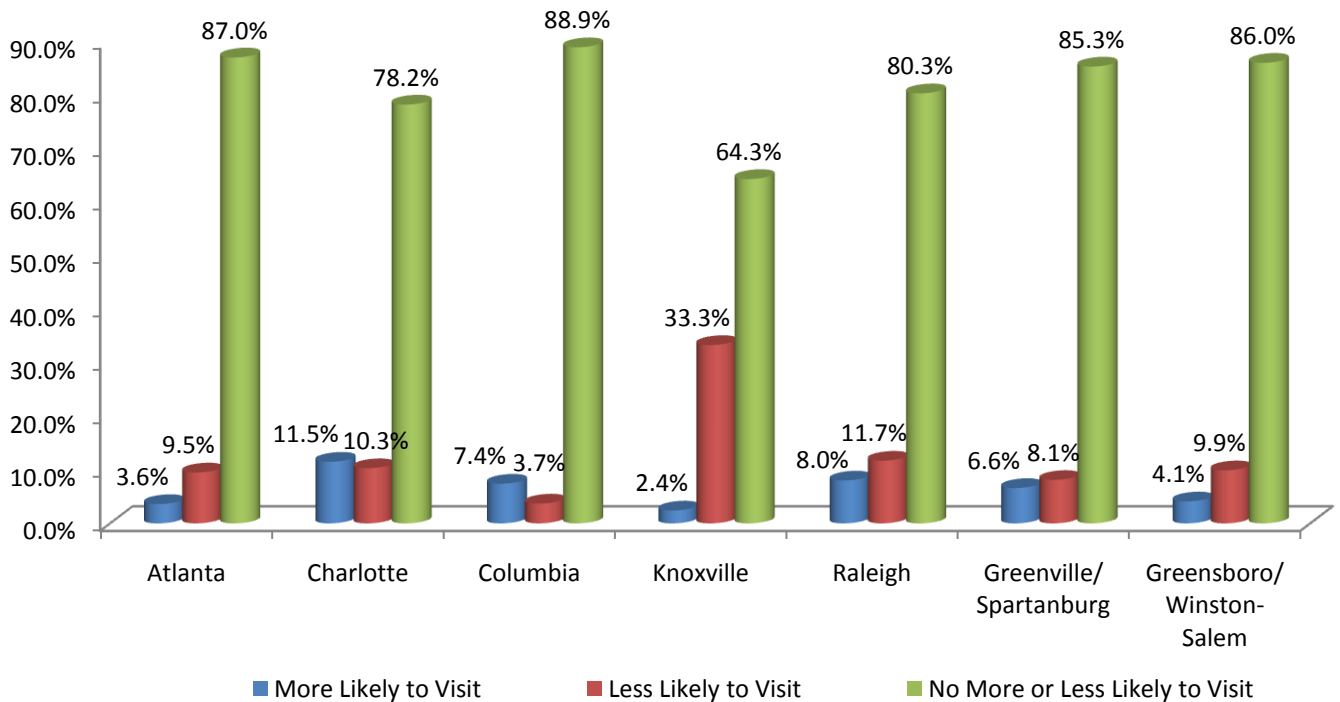
- Of the 16.5 percent of Atlanta respondents who are aware of the rock slide, over two-thirds (66.7%) of them know the correct location of the slide, while twenty-one percent are not sure.
- All other markets have a higher proportion of respondents who correctly know the location of the rock slide
  - Charlotte – 87.4%
  - Columbia\* – 73.7% (\*small sample size)
  - Knoxville – 83.1%
  - Raleigh – 80.6%
  - Greenville/Spartanburg – 86.0%
  - Greensboro/Winston-Salem – 81.3%

- **Perception of impact of rock slide on future travel to North Carolina mountains**
  - **Major inconvenience?**
    - Knoxville respondents agree most strongly that the rock slide would be a major inconvenience to them (70.3%), while Atlanta respondents are unsure (47.0%) as to whether it would be an inconvenience. This is most likely due to the lack of awareness overall in this market.
    - About forty percent of respondents in the Raleigh, Greenville/Spartanburg, and Greensboro/Winston-Salem markets agree that the rock slide would be a major inconvenience.
  - **Alternate route?**
    - The Knoxville market has the highest proportion of respondents (84.5%) who indicated that the rock slide would cause them to find an alternate route to the North Carolina mountains.
    - Just over half of the respondents (50.7%) from the Greenville/Spartanburg market and just less than half of the Greensboro/Winston-Salem market believe that the rock slide would require them to take an alternate route, while thirty-two percent of Atlanta respondents indicate the same.
  - **More difficult to get to destination?**
    - Almost three-fourths of Knoxville respondents believe that the rock slide will make it more difficult to get to their North Carolina destination, while only one-fourth (26.1%) of Atlanta respondents believe this.
    - Just over a third of Charlotte (34.5%) and Raleigh (39.9%) respondents responded that the rock slide would cause difficulty getting to their destination.
    - A slightly higher proportion of Greensboro/Winston-Salem (41.3%) and Greenville/Spartanburg (41.9%) responded similarly.
  - **Traffic or delays as a result of rock slide?**
    - Despite knowing the exact location of the rock slide, twenty-nine percent of respondents in eastern markets (excluding Atlanta) expect that that the rock slide will cause delays and other traffic on their normal or alternate route to the North Carolina mountains.
    - Over seventy percent of Knoxville respondents agreed that the rock slide would cause traffic and delays on their route to the mountains.
  - **No impact of travel?**
    - Almost one-third (32.1%) of eastern markets agreed that the rock slide would have no impact on their travel.

- **Likelihood of rock slide change travel plans to the North Carolina mountains**

- As shown below, the majority of respondents from all markets indicate that they are no more or less likely to visit the North Carolina mountains in the next six months, even with the knowledge of the correct location of the rock slide. Even the Knoxville market had over two-thirds of the respondents say that the rock slide will not deter them from visiting.

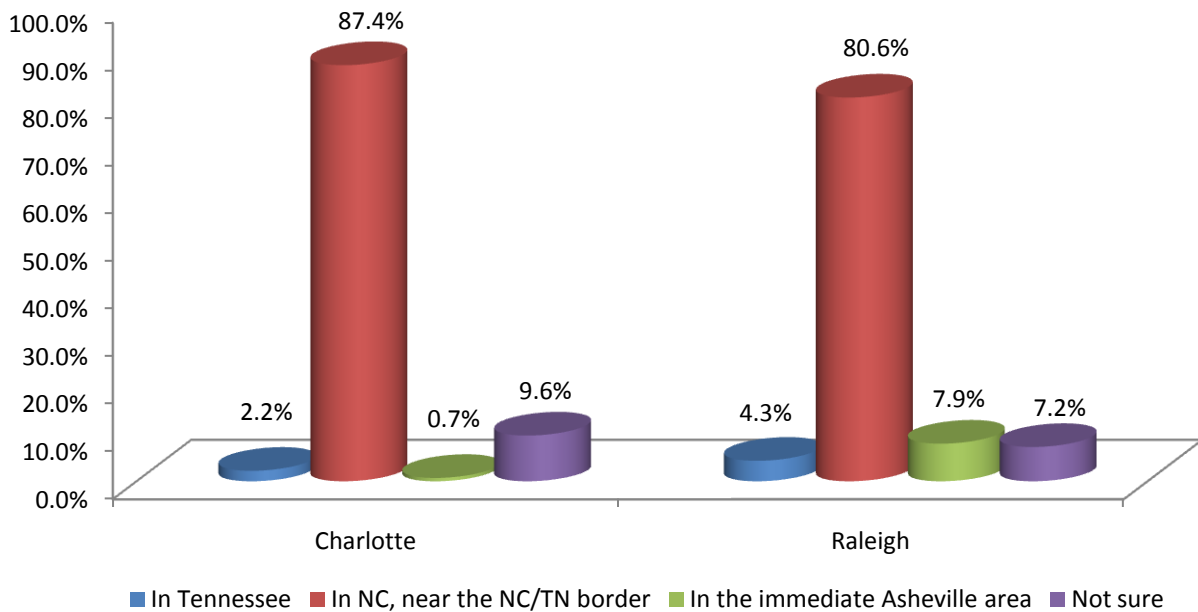
**How has your likelihood to visit the North Carolina mountains in the next 6 months changed (with the understanding of the location of the rock slide)?**



### Comparison of Raleigh and Charlotte markets

- With the exception of Knoxville and Atlanta, all other key markets had very similar responses to all of the survey questions. In fact, there are few differences in responses between markets that were statistically significant.
- Though there are few statistically significant differences between markets, the following tables and charts show responses specific to the Raleigh and Charlotte markets. A notation is provided for the differences that are significant.

**Based on your knowledge of the rock slide, where is the rock slide located?**



\* The differences between markets for this data is statistically significant.

Assuming you were planning to travel to the North Carolina mountains in the near future, how much would you agree or disagree with the following?

	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
<b>The rock slide blocking I-40 would be a major inconvenience</b>					
Charlotte	12.7%	22.4%	24.2%	23.6%	17.0%
Raleigh	16.5%	23.4%	27.7%	17.6%	14.9%
<b>The rock slide blocking I-40 would cause me to take an alternate driving route.</b>					
Charlotte	12.5%	25.5%	21.2%	20.0%	18.2%
Raleigh	19.7%	26.1%	23.9%	18.1%	12.2%
<b>The rock slide blocking I-40 would make it more difficult for me to get to my destination.</b>					
Charlotte	12.7%	21.8%	24.2%	21.8%	19.4%
Raleigh	12.8%	27.1%	27.1%	20.2%	12.8%
<b>The rock slide blocking I-40 would create traffic or delays on my normal or alternate route.</b>					
Charlotte	18.2%	26.1%	23.6%	16.4%	15.8%
Raleigh	17.0%	29.3%	29.3%	11.7%	12.8%
<b>The rock slide blocking I-40 would have no impact on my travel plans.</b>					
Charlotte	28.5%	20.6%	20.6%	21.2%	9.1%
Raleigh	20.2%	20.2%	27.1%	21.8%	10.6%

\*There are no statistically significant differences between Charlotte and Raleigh in this data.

- The following chart represents answers that were given AFTER respondents were told of the exact location of the rock slide.

**How has your likelihood to visit the North Carolina mountains in the next 6 months changed (with the understanding of the location of the rock slide)?**

