

EXECUTIVE SUMMARY

THE DESTINATION SELECTION PROCESS



Destination selection is very much tied to individual traveler interests and motivations. Travelers look for different things for a leisure trip based on their passions/interests, travel partner(s), and life-stage (age/children). Most have a desire for a variety of activities, relaxation, and affordability to appeal to not only themselves, but their travel companions as well. With Ashland's variety of experiential offerings, and provided that more awareness about the destination brand is generated, the destination is uniquely positioned to attract more visitors.

Small towns have a favorable image that Ashland can capitalize on. High potential visitors clearly see the value and benefits of visiting small towns. Small towns are associated with easy navigation, fewer/smaller crowds, less expensive, slower pace, more relaxing, more welcoming and a more authentic, natural feel.

COVID-19 clearly affects travel and travel planning. The pandemic brings an aversion to flying and some general resistance to overnight travel. The pandemic creates reticence to dining out or being in crowded areas. Some noted challenges in finding open attractions during recent past trips. That said, those who have traveled, or feel ready to travel, find that the first trip builds confidence. As seen in Destination Analysts weekly *Coronavirus Travel Sentiment Index Study*, as well as through other qualitative research conducted, the pandemic will continue to be top-of-mind in planning travel. This should be considered as Travel Ashland develops future marketing.

TRAVEL INSPIRATION

Travel information is primarily sought online. As noted in the Survey of Leisure Travelers in Key Markets, as well as data from Destination Analysts' syndicated *The State of the American Traveler Study*, travelers primarily use online resources for travel inspiration. Travelers access multiple resources, such as: general online searches, social media like Instagram and Facebook travel groups. Word-of-mouth, both in person and through social media, is also key in inspiring travel.

High potential Ashland visitors can best be reached through a variety of marketing channels. This includes:

- Social media, particularly action-packed videos on Instagram or Facebook
- Search engines such as Google
- Streaming services (e.g., Hulu)
- The official destination website (with strong search capabilities and in-depth information)
- Billboards
- Mailers



THE ASHLAND DESTINATION BRAND

In general, High Potential Visitors express positive opinions about Ashland:

Culture and nature are largely associated with the Ashland destination brand. Both past visitors and non-visitors focused on Ashland's beauty, outdoor assets, and arts and culture in describing the city and its strengths. In addition, these High Potential Visitors value Ashland's small-town feel, warmth, and friendliness.

Wineries, wine bars, museums, coffee shops, parks, unique shopping, and the walkable and interesting downtown add further appeal. A few participants acknowledged a "hippie-ish" motif, which for some builds a deeper interest in exploring Ashland.

“I searched online for places to visit in Oregon and Ashland appeared as a top 10 small arts and culture town.”

THE ASHLAND DESTINATION BRAND

High potential visitors describe Ashland with words and terms that align with the destination's brand of arts & culture and nature. They shared that Ashland has/is:

- Culture (Shakespeare Festival)
- Food/Wine
- Quaint/charming ambience
- Great place to explore (the town)
- Great place to explore (outdoors)
- Lots to do
- Warm/inviting
- Variety
- Easy Access
- “Magical” and “free-spirited”
- Little big city
- Good balance of everything
- Friendly community
- Relaxing ambience



THE ASHLAND DESTINATION BRAND

The “lightning round” during the in-depth interviews specifically captures top-of-mind reactions to Ashland. And these top-of-mind reactions highlight the ideal visitors for Ashland and the destination’s strengths, which are again tied to arts & culture and nature.

Best Visitor	If in Ashland, I would ...	You’d be crazy to visit Ashland without experiencing ...
Outdoor enthusiast	Snowboard	Mountains
Active and enjoys outdoors	Enjoy outdoor activities	Local art galleries
Health-conscious traveler	Explore	Outdoor activities of Ashland
Nature lover	Visit wineries	Food and shopping
Someone who likes nature and theatre	See different areas, not just downtown	Local river and mountains
Explorer	Visit the museum	Visit the local community
Anyone	Soak in the art	Shakespeare festival
Something for everybody	Be outside a lot	Go to theatre
Enjoys small towns		

ALL TRAVELERS: ATTRIBUTES IMPORTANT TO DESTINATION SELECTION vs. ASHLAND'S RATINGS

Ashland performs well for outdoor recreation, off-the-beaten-path ambiance, family friendliness, accommodations, wineries, performing arts, and winter recreation.

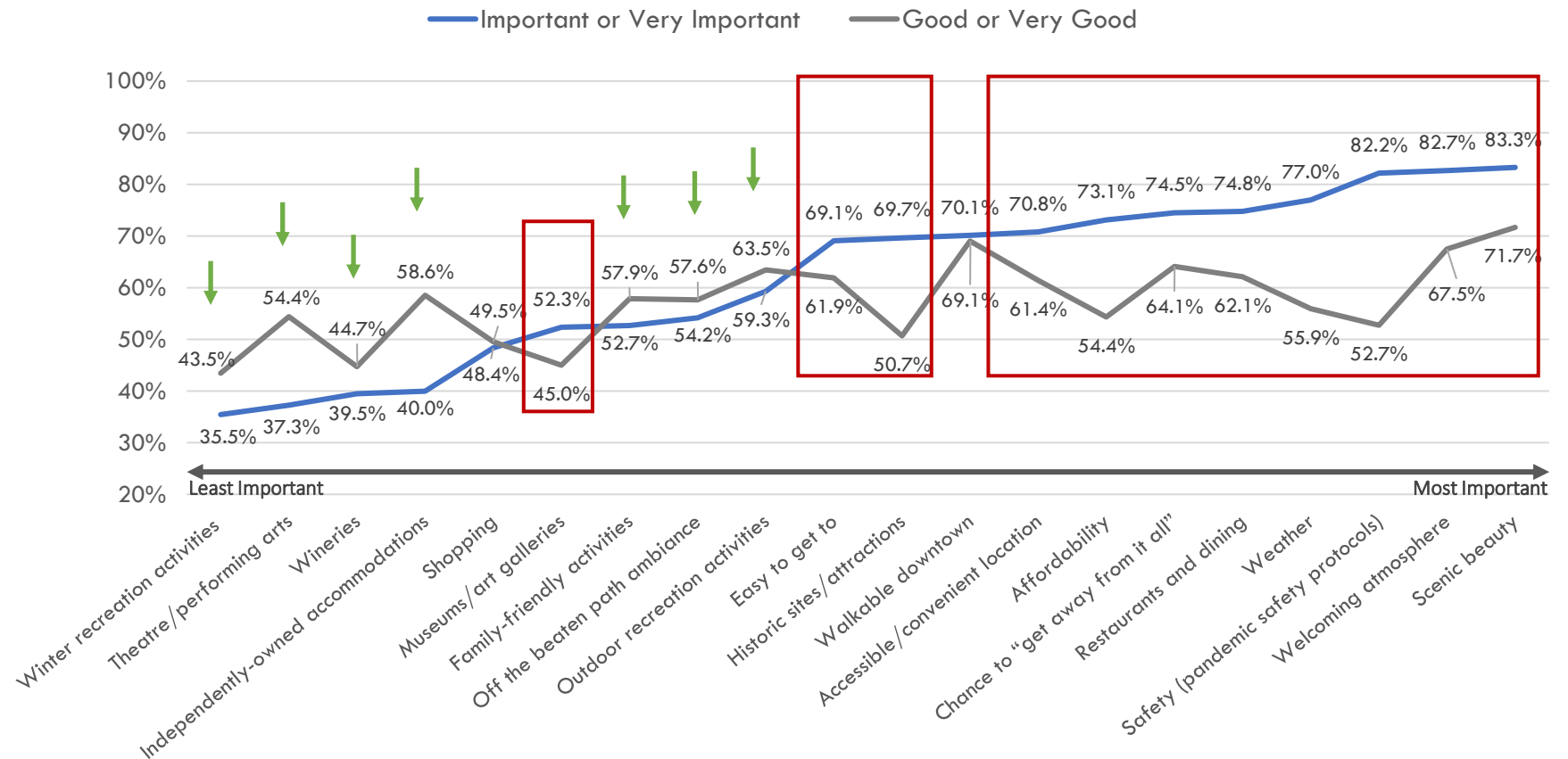
Otherwise, it under-performs for most attributes, including those that are the most important to selecting leisure destinations in the Pacific Northwest.

The chart at right maps the percent of travelers who rated each attribute "Important" or "Very important" in selecting leisure destinations in the Pacific Northwest against the percent who said rate each attribute is "Good" or "Very good" in Ashland. Attributes in gray above the blue line illustrate where Ashland performs well – exceeding the level of importance.

The red box on the right side of the chart highlights those attributes where Ashland performs sub-par on the most important attributes (the two left red boxes attributes are also sub-par, but less important). Although approximately two-thirds of travelers associate the area with scenic beauty and a welcoming atmosphere, even these attributes fall below their level of importance. Pandemic safety and affordability lag even more.

Emphasizing how Ashland excels on these features should be a priority in the destination's marketing messaging.

Figure: Attribute Importance to Selecting Destinations in Pacific Northwest vs. Ashland's Ratings



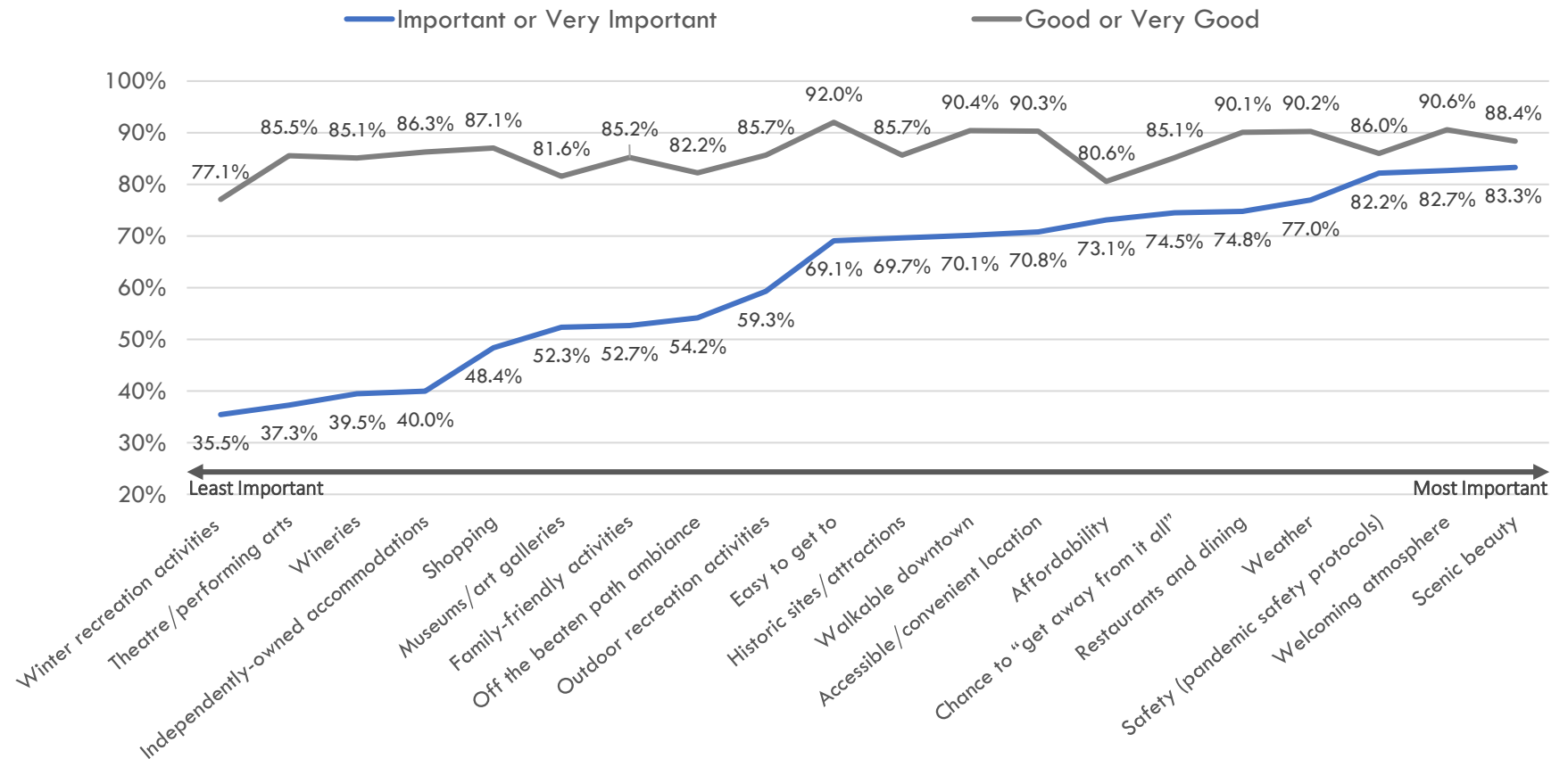
Question 1: Think carefully about how you usually approach selecting the places you visit for leisure in the Pacific Northwest region. In general, how important are each of the following to how you select the places you visit? Please use the scale below where "1" equals "Very unimportant" and "5" equals "Very important" to answer for each. 2. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Ashland a place to visit to visit for leisure travel. Even if you are unfamiliar with Ashland, please answer based on your current perceptions. Base: All respondents. 1,539 completed surveys.

HIGH POTENTIAL VISITORS: ATTRIBUTES IMPORTANT TO DESTINATION SELECTION vs. ASHLAND'S RATINGS

High potential visitors (who receive a visitation index score of 70 or higher based on their likelihood of taking a leisure trip to Ashland, the appeal of things to see and do in Ashland and familiarity with Ashland) are much more likely to rate Ashland highly for the destination attributes tested.

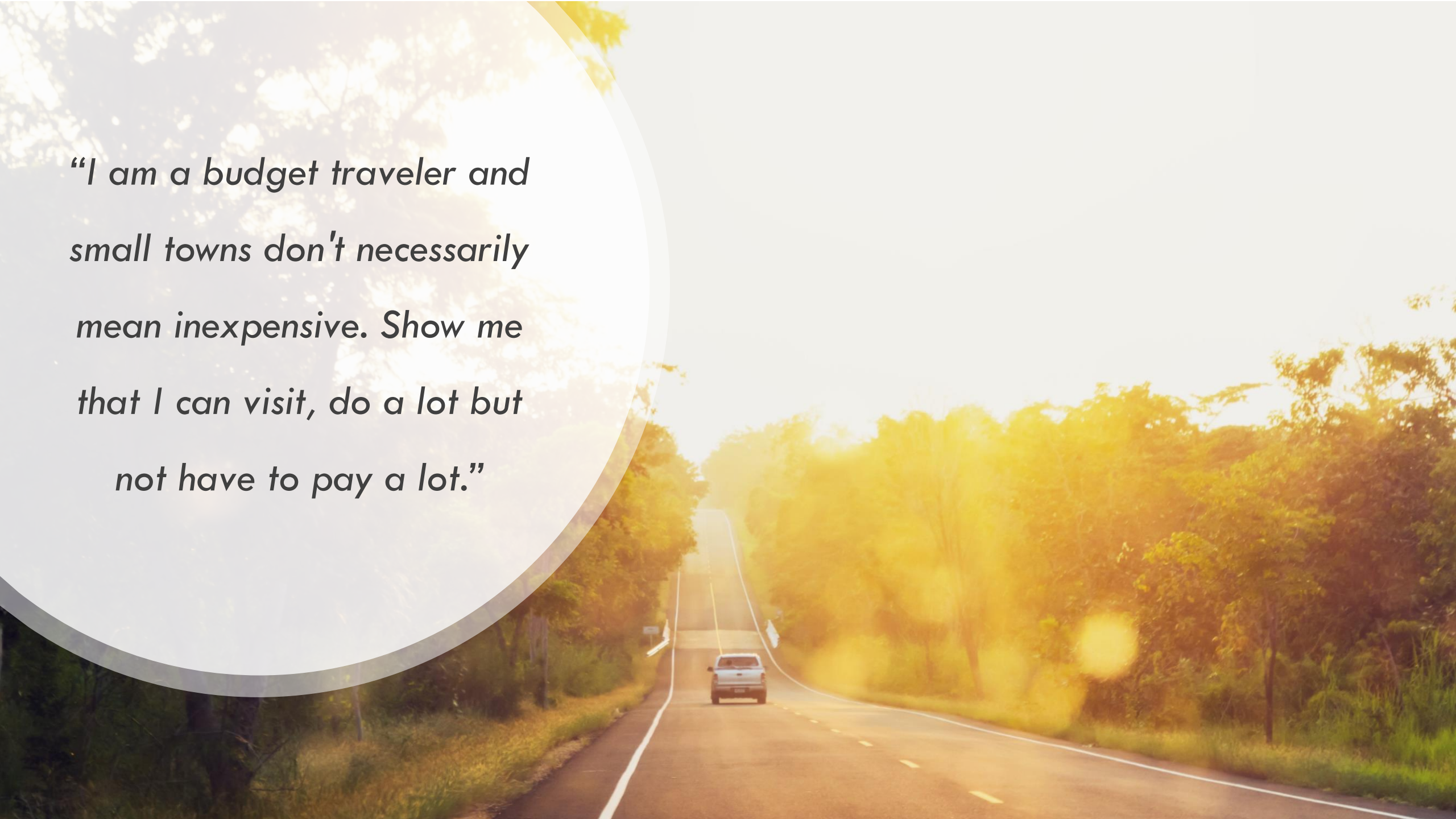
In analyzing the importance of destination attributes against ratings of Ashland amongst high potential visitors, there are no deficits. The attributes of most importance to destination selection—scenic beauty, welcoming atmosphere and pandemic safety—received high ratings in Ashland.

Figure: Attribute Importance to Selecting Destinations in Pacific Northwest vs. Ashland's Ratings of High Potential Visitors



Question 1: Think carefully about how you usually approach selecting the places you visit for leisure in the Pacific Northwest region. In general, how important are each of the following to how you select the places you visit? Please use the scale below where "1" equals "Very unimportant" and "5" equals "Very important" to answer for each. 2. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Ashland a place to visit to visit for leisure travel. Even if you are unfamiliar with Ashland, please answer based on your current perceptions. Base: All respondents. 1,539 completed surveys.

“I am a budget traveler and small towns don't necessarily mean inexpensive. Show me that I can visit, do a lot but not have to pay a lot.”



CREATIVE EVALUATION: ASHLAND IMAGES



Images highlighting Ashland's scenic beauty are attractive.

The image of fall colors and the mountain scene were unanimously considered the most appealing of the tested images. Meanwhile, the selfie image was considered to have been taken in anywhere, with the focus being on the people rather than the destination, and the wine image was appealing to those interested in wine.

CREATIVE EVALUATION: PRINT ADS

While reactions to the print ads were relatively lukewarm, the ad showcasing multiple images of Ashland was considered far more appealing. This ad was successful in broadening the image of Ashland, however excess white space and small images detracted. The wine print ad was described as too singularly focused and the image overpowered the more inclusive text.



CREATIVE EVALUATION: STREET POLE BANNERS

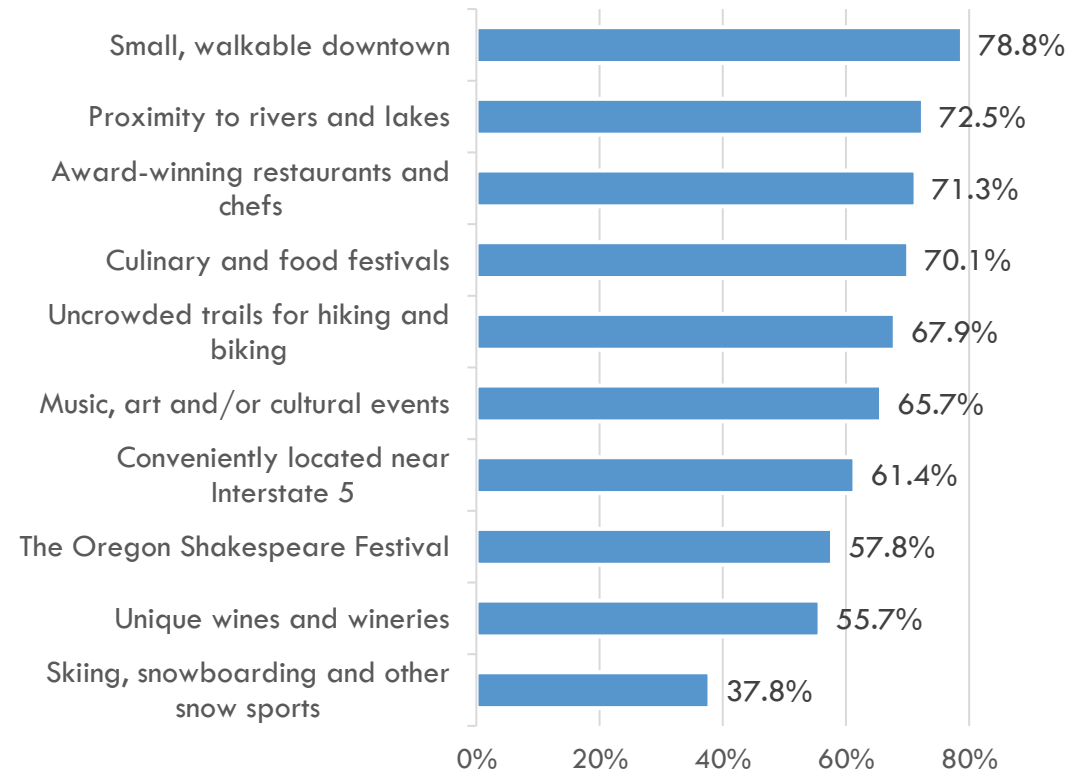
The Ashland street pole banners were met with overwhelmingly positive reactions. Travelers raved about these ads and described them as excellent motivators to visiting. The images with more “energy” (hiking trail, SUPing) excited travelers most. While the shopping and wine banners demonstrated other aspects of the Ashland experience, a few felt that these were less visually impactful and that the “text gets lost” in these specific banner ads.



MOTIVATORS TO VISIT ASHLAND

In terms of motivating leisure travelers to visit Ashland in the near future, the destination’s features are considered interesting. More than half of all travelers surveyed reported that all attributes tested (with the exception of skiing, which has a specialized following) are either “interesting” or “very interesting.” The small, walkable downtown tops the list (78.8%), followed by rivers/lakes (72.5%), award-winning food (71.3%), and food festivals (70.1%). Interest in these motivators is even higher for key traveler segments (e.g., High Potential Visitors, Families, Wine Travelers, Arts & Culture Travelers, Culinary Travelers and Outdoor Adventurers).

Motivators to visit Ashland in Next 3 Years
Top 2 Box Score —% Rating “Interesting” or “Very Interesting”



Question: In terms of motivating you to visit Ashland in the next three years, how interesting do you find each of the following attributes? (Select all that apply) Base: All respondents. 1,539 completed surveys.

DETERRENTS TO VISITING ASHLAND

The following insights cover barriers and deterrents to visiting Ashland that emerged during the in-depth interviews.

Lack of knowledge. As noted in the Survey of Leisure Travelers in Key Markets, potential visitors simply, and most commonly, do not feel they know enough about Ashland. Presenting content that inspires them to visit Ashland is essential. Potential visitors have many questions; they want to know about restaurants, festivals, arts & culture and outdoor activities. Other questions that came up were: *Are there other attractive destinations nearby? How is the shopping? Are there luxury accommodations?*

Distance and time to travel. As was also see in the Survey of Leisure Travelers in Key Markets, Ashland may require a longer drive or a flight. With a lack of direct flights, the time and expense mounts. For specific target geographic markets, it may be worthwhile for Travel Ashland's marketing to address easy and convenient drives and/or flights.

Unbalanced information. Particularly for those who are unfamiliar with Ashland, the focus on arts & culture may communicate that Ashland may not be for other types of travelers, such as Outdoor Adventurers or foodies. In fact, several interview participants mentioned that they had no idea that Ashland had wineries and opportunities for outdoor recreation.

“Don’t just tell me. Show me what I will see and do when I get there.”

“Show me someone having fun at the attraction so I can see myself there. Maybe a YouTube influencer sharing their real experience.”

SEVEN MESSAGING ESSENTIALS: MOTIVATING TRAVELERS TO VISIT AND/OR STAY LONGER

1.) Communicate the ease of travel to Ashland. Convince potential visitors that the distance is worth the effort and if at all possible, make the transportation options easy. Direct air service development will especially entice farther markets to visit Ashland more frequently. Additionally, show ways that travel can be unique (train options), economical and/or simple to plan.

2.) Demonstrate that there is more than enough to do. Show visitors engaging in the many activities and experiences in Ashland. This may ultimately communicate *“there is so much to do that can fill a long trip.”*

3.) “Come for the Shakespeare, stay for the trails.” The focus on the Shakespeare festival draws many visitors, but potential visitors could very well be unaware that Ashland offers miles of scenic trails and other outdoor recreation.



SEVEN MESSAGING ESSENTIALS: MOTIVATING TRAVELERS TO VISIT AND/OR STAY LONGER



4.) Balance Ashland between nature and arts & culture. The destination excels in both; it would be easy for one to overwhelm the other.

5.) Position Ashland – both as a leisure destination, as well as geographically. Ashland can potentially serve as a base camp for exploring the larger area and encourage visitors to expand their length of stay.

6.) Acknowledge COVID-19 and the measures Ashland is taking to ensure health and safety. From the numerous qualitative and quantitative research studies Destination Analysts has conducted over the past year, it's clear that COVID-19 has impacted travel planning and the places travelers choose to visit. Illustrating how the city and its tourism community is addressing the situation will likely go a long way in getting travelers to consider Ashland.

7.) Show that Ashland can be economical. Visitors can experience Ashland without “*breaking the bank.*” However, this message should be balanced with luxury options for those who like to “*splurge on travel.*”

Marketing Implications

A marketing guide comparing key traveler segments.

Most Lucrative (Average spending per day in Ashland)	Easiest – Already “Tuned-In” to Ashland (Likely to Visit in the Next 3 Years): Message: “Come Soon, Come Often”	Avid Travelers (Average Trips Planned in the Next 12 Months) – Message: “Add an Ashland Trip”	Off-Peak Visitors (Sum of those who would likely visit between November–February) Message: “Ashland Is Open All Year”	Need More Information (Doesn’t Know Enough) – Strategy: Educate on Ashland’s assets and experiences
Total: \$511	Total: 49.0%	Total: 3.4 Trips	Total: 21.2%	Total: 29.8%
Profiles, Rank Ordered				
High Potential: \$719	High Potential: 100%	High Potential: 4.2	High Potential: 51.7%	Non-Recent: 35.7%
Wine Travelers: \$659	Recent Visitors: 81.2%	Recent Visitors: 3.9	Recent Visitors: 33.6%	Boomers: 35.2%
Millennials: \$623	Wine Travelers: 76.2%	Adventurers: 3.8	Wine Travelers: 34.2%	Gen Xers: 28.9%
Recent Visitors: \$613	Arts & Culture: 68.8%	Wine Travelers: 3.8	Families: 33.8%	Culinary: 27.0%
Arts & Culture: \$612	Families: 68.7%	Culinary: 3.7	Culinary: 32.3%	Families: 27.0%
Culinary: \$593	Culinary: 66.9%	Families: 3.7	Millennials: 30.5%	Millennials: 25.5%
Families: \$583	Millennials: 67.9%	Millennials: 3.6	Arts & Culture: 29.0%	Adventurers: 24.9%
Adventurers: \$561	Adventurers: 61.6%	Gen Xers: 3.5	Gen Xers: 27.3%	Wine Travelers: 19.2%
Gen Xers: \$528	Gen Xers: 51.3%	Arts & Culture: 3.4	Adventurers: 26.7%	Arts & Culture: 19.2%
Non-Recent: \$484	Non-Recent: 40.8%	Non-Recent: 3.2	Non-Recent: 17.9%	High Potential: 6.7%
Boomers: \$379	Boomers: 27.6%	Boomers: 3.1	Boomers: 6.6%	Recent Visitors: 0%