



America's Byways® Image & Visitor Profiling Research

Key Findings December 2007

Project Background



- America's Byways® Resource Center, in partnership with the Federal Highway Administration, executed three phases of research in association with the development of a new Public Awareness Plan* (Plan)
 - *Stakeholder*
 - *Visitor Profiling*
 - *Positioning*
- Longwoods International was commissioned to provide the research component and input into the development of the Plan and help define the overall approach and messaging strategies
- The focus of this report and key finding contained herein relate to the following two consumer research components:
 - *An Image and Positioning Study*
 - *Personal Vehicular Traveler Analysis - a detailed analysis of the byways' target market*

* This Plan is a strategic document that outlines Public Awareness activities for America's Byways® as authorized by Congress in 2005.

Key Research Findings - Summary



Based on the Longwoods Travel USA® Personal Vehicular Travel Analysis and Custom Image & Positioning Research studies executed for Americas Byways® in 2006 and 2007, Longwoods concludes that the America's Byways Collection offers an untapped opportunity in terms of stewardship, preservation and economic value for the communities along the designated Byways.

With less than 10 percent of Americans 18 years or older having traveled one of America's Byways in the last two years, of which 92% said they had a memorable experience, clearly America's Byways are one of the Nation's best kept secrets. Additionally, given that over 60% of Americans 18 years or older say they would likely visit one of America's Byways after learning more about the Collection, indications are that the economic value resulting from increased public awareness could be substantial.

Moreover, Longwoods' feels that based on the various findings and analyses of the custom research, and the estimated per person spending of the three priority segments: touring, special event and outdoor travelers, that an investment in elevating the public's awareness of America's Byways, if done effectively, will produce a positive Return on Investment for the Byways communities, the Federal Highway Administration, and the America's Byways Resource Center.

Key Research Findings – Image & Positioning



- Low awareness of the America's Byways® Brand – 37% Aided Awareness (picked from list) of the name America's Byways.
- On average, 50% of Americans 18 years and older who are aware of “individual” byways across the nation, are not aware of the America's Byways designation.
- When comparing the impressions of the America's Byways collection among those who have visited vs. not, there is substantial lift in agreement as to the quality of the America's Byways experience indicating that there is not a product problem, but rather, a marketing opportunity.
 - *In fact, over 92% of recent byway visitors feel they had a memorable experience filled with experiences/activities that contribute to key Travel Motivators correlated with “an experience I would really enjoy” in the first place.*
- Less than 10% of adults 18 years and older have traveled America's Byways in the past, and after learning more about the Collection by being exposed to a variety of byway names, images and maps (communications) in the image & positioning study:
 - *over 67% indicate that America's Byways offer “An experience I'd really enjoy”*
 - *60% indicate post communication a likelihood of traveling on America's Byways*
 - *44% indicate that they would definitely or probably take a trip on one of America's Byways in the next 2 years*
- The number one item of importance in making America's Byways more appealing to potential travelers is “More Information/Better Publicity.”

Key Research Findings – Personal Vehicular Traveler Analysis



- Based on an analysis of Longwoods' proprietary Occasion-Based Segmentation Model data (and a look specifically at those who take a trip in their car, motor home, or on a motorcycle), it was determined that the Outdoor, Touring and Special Event segments not only align well with the America's Byways® experience, but are the three largest segments of overnight travelers within this sub group.
- Collectively, these three segments represent over 51% of rubber tire overnight trips and 48% of overall overnight pleasure trips in 2005.
- In exploring regional or segment specific differences in these groups, (that could affect a go-to-market strategy, familiarity and visitation of America's Byways) the data suggested that the downstream messaging strategy should focus on two segments: Touring/Special Event and Outdoor.
- Given the parallels in the wants and needs of the Touring and Special Event segments, Longwoods concludes that these two groups are not mutually exclusive; however, when creating story ideas for vertical media, individualities should and could be leveraged.
- Longwoods also looked at what is important to communicate to byway travelers in order to get on the consideration list and motivate the desired behavior to visit a byway. The primary takeaway from this analysis was that there are regional differences in what motivates potential visitors, as can be seen in the charts on the following pages. Therefore individual Byways need to focus on what matters most to potential visitors in their market areas.