



JENNINGS

Hillsborough Brand Assessment – Summary Report

September 10, 2007

About Jennings

Jennings is an advertising agency and brand consultancy specializing in brand building, positioning and growth strategy. We use the brand development model to tap into market insights and develop sound brand strategies, refine brand positioning, assist with organizational change, and oversee brand execution (both internally and externally).

Jennings helps businesses and organizations achieve lasting improvement in competitiveness, success in the marketplace, and brand stature. We approach the challenge of enterprise growth by first evaluating the strength and positioning of the existing brand, assessing the relationship of the brand to the enterprise and to your key constituencies, and then by prescribing brand and operational solutions that effectively position the organization for next-level growth.

Introduction

Between the dates of July 20, 2007 and August 31, 2007, Dan Dunlop, Bruce Wlach and Tyler Estrada of Jennings conducted a brand perception study to evaluate perceptions of the Hillsborough brand and to make recommendations for effectively marketing the brand in the future. This particular study was focused on Hillsborough as a destination for visitors. The study included an internal brand assessment to evaluate perceptions of the Hillsborough brand within various community organizations. The internal assessment included one-on-one interviews with various town members that were identified as key influencers by the Tourism Board. Jennings also conducted visitor intercepts both on Churton Street and at the Visitors' Center. Brand association methodology is reviewed later in this report. In all, Jennings gained exposure to 13 members of the Hillsborough community including business owners, board members, restaurant owners and real estate agents and two people who managed recent events in town.

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An additional component of the brand perception study involved accessing perceptions of Hillsborough that are held by external constituents to the brand – visitors to the town. To do this, Jennings conducted visitor intercepts in Hillsborough. Verbatim responses from interviews and intercepts are included later in this report.

A significant element of this study involved a comprehensive review of Hillsborough’s marketing materials, along with those of competing destinations within the region. The Hillsborough marketing materials, including Hillsborough’s online presence, were reviewed for messaging and graphic representation of the Hillsborough brand, and overall consistency.

Brand Assessment Methodology

- I. One–On–One Interviews With Hillsborough Residents, Board Members and Town Officials
 - One-to-One Interviews – Jennings conducted 15 one-to-one or phone interviews with Hillsborough residents, board members and town officials who were chosen by the Board. These participants represented a range of experience including retail, food service, tourism, real estate, hospitality, local government, the arts and chamber of commerce. The individuals on the list were contacted by Jennings and interviews were conducted at the Visitor Center (Dickson House) or at their place of business. Due to scheduling issues, some interviews were conducted by phone.
- II. On-The-Street and Visitor Center Intercepts of Visitors to Hillsborough
 - One-to-One Interviews – Jennings conducted 26 one-on-one interviews with visitors to Hillsborough. These were conducted at random on the street and in the visitor center on three occasions during July and August.

Interview Methodology

One-On-One Interview Questions

The purpose of the interview questions is to help the respondent clearly express their perceptions of the brand. The questions are purposely designed to be redundant, so that eventually a version of the question will evoke a thoughtful response. It is often difficult for respondents to describe their relationship to the brand. By including brand association questions, we help respondents think creatively and free themselves to speak emotionally about their relationship with the brand.

1. How would you describe the personality of the Hillsborough area?

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2. If you could use one word to capture the essence of Hillsborough, what would it be?
3. If Hillsborough were a car, what kind of car would it be and why?
4. What does Hillsborough do exceptionally well for visitors?
5. What do you wish Hillsborough offered, that is not currently available?
6. How would you describe Hillsborough to a friend who has never visited the area?
7. What do you wish people knew about Hillsborough that they don't already know?
8. What is the most common positive feedback that you hear from visitors about Hillsborough?
9. What is one thing that everyone knows about Hillsborough? If they know one thing, this is it.
10. What is the most popular attraction for visitors?
11. What attractions could be marketed more aggressively?
12. What needs to be added to Hillsborough to make it more attractive to visitors?
13. How is Hillsborough unique from other vacation destinations?
14. Provide a list of positive words to describe Hillsborough.
15. What could we be doing better to market the area and keep people coming back?
16. What, if any, challenges does Hillsborough face as it works to build its brand and grow visitor business?
17. Does the town do a good job of coordinating the effort to attract visitors? What could be improved?

Visitor Intercept Questions (at Visitor Center and on-the-street)

Jennings conducted visitor intercepts on Churton Street, at the Farmers Market and at the Visitor Center. Visitors were offered \$5 to participate in a five-minute interview. The questions were straightforward in identifying where the subject was from, the purpose of their visit, how they came to visit the town, length of stay, frequency of visits, interaction with the town website and other destinations of interest. The questions were designed to elicit the maximum amount of information in the shortest amount of time. Conversations were encouraged, but often difficult to sustain as people were on their way to events or tours and often with family or friends.

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1. Where are you from?
2. What brought you to the area?
3. How long is your stay? Where are you staying?
4. What do you plan to do during your stay?
5. Is this your first time visiting?
6. What other areas are you planning to visit while you're here? Will you be going to Chapel Hill or Carrboro?
7. How did you hear about the area?
8. Did you visit the website when planning your trip?
9. Would you be inclined to come back/are you open to receiving information about travel opportunities in Hillsborough?
10. What other day trip destinations do you enjoy?

Executive Summary

The Hillsborough Brand

The following terms capture the essence of the Hillsborough brand as reported by the internal audience:

Historic, diverse, involved, picturesque

Hillsborough's Brand Position

Based on the perceptions of those we interviewed for this study, we were able to develop a brand position that represents current perceptions of the Hillsborough brand.

What makes Hillsborough distinct from other visitor destinations?

-- A well-documented, historic past that is well preserved in a welcoming, authentic small town environment.

Brand Position Verbatim Response: Historic

"Compact, quaint historic town. Friendly and interesting – rich with literature and artists."

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“We’re a modern, forward-thinking town that’s aware of its history.”

“In the context of heritage – the integrity is still here.”

“The historic district is number one. The buildings are compact and walkable. The tree-lined streets give it a sense of place.”

Brand Position Verbatim Response: Welcoming

“We show hospitality. We’re friendly and aware of visitors and take the time to talk with them.”

“ We make them feel welcome, at home, a member of the community.”

Brand Position Verbatim Response: Authentic

“People live here and have a shared sense of place. It has the small town feel and appearance, a sense of community and authenticity.”

Brand Position Verbatim Response: Small-Town

“A small town atmosphere. Little shops without the hustle and bustle. It’s like a big family where you know people by name.”

“It’s folksy and homey. We have a blacksmith shop. It’s an area to reminisce – the amusement area, ice rink and railroad.”

“ A bustling small town, where people are recognized and it’s easy to step into the community.”

Hillsborough’ Brand Personality Characteristics

- Hillsborough is perceived to be a relaxed, unpretentious, small town full of Southern charm

Brand Personality Verbatim Responses: Relaxed

“I once thought it was vibrancy, but it’s laid back too. It’s relaxing, but it still has a compelling energy.”

Brand Personality Verbatim Responses: Unpretentious

“We are ourselves – authentic and friendly.”

“A Sesame Street town where the mayor is accessible and people/characters are identifiable.”

“Redneck meets literati. Take a picture of the patisserie next to the bait & tackle store.”

Brand Personality Verbatim Responses: Southern Charm

“They feel embraced, it’s user friendly – no struggle for a nice experience.”

Hillsborough’ Brand Personality Characteristics

Friendly	A little edgy
Plain-talking	Dedicated
Eclectic	Welcoming
Casual	Old
Unique	Basic
Laid-back	Small
Fun	Cute
Modest	Happening
Colorful	Rural
Picturesque	Revolutionary
Progressive	Accessible
Authentic	Historical
Clean	Approachable
Vibrant	Funky
Hip	Charming
Active	Diverse –“redneck to literati”
Passionate	Creative
Invested	Green
Cooperative	Quaint
Tolerant	Blossoming
Self-aware	Proud
Preservation-minded	Comfortable
Walkable	Artsy
Forward-thinking	Unexploited

Brand Association: Hillsborough as a Vehicle

Q: If Hillsborough were a car, what kind of car would it be and why?

- 1972 Diesel Mercedes Benz –old and functional in all situations.
- Chevy – a basic car with down-home roots.
- Acura – utilitarian.
- Ford – a blasé appearance that doesn’t excite anyone.

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- An antique car that is half restored – a lot has been done, but there is still a lot to do. They haven’t used original equipment to restore it.
- VW Beetle – cute, unique, fun to drive, with a touch of class and elegance.
- Camry – middle of the road, upper scale.
- A mid-range sport utility vehicle -- not too luxurious, not too plain; can carry its weight or seat two. Just right.
- Sporty hatchback/crossover SUV – small and functional.
- Antique car & Ford F-150 pick-up – well done, colorful, with a clean, strong rural component.
- Hybrid – middle of transition.
- Cooper Mini – classic, happening, modest, a little edgy, fun, gets your attention, unique.
- A-model with a rumble seat – old and classy.
- A Subaru that’s fun, sporty, lasts a long time. It’s three parts Lexus, one part Ford Pinto – well built, quality, fun and laid back.

Hillsborough: Defining Brand Attributes

Walking trails	Eno River
Ayr Mount	250 years of history
Unique shops	Great restaurants
Last Friday’s	Hog Day
Location – close to RTP	Weather
Small town charm	Antiques
Welcoming feel - hospitality	Candlelight tour
Garden Tour	Walkable historic district
Museum	Dickson House

Brand Attribute Verbatim Responses:

“Still has small town charm. An air of sophistication with a dedication to culture, heritage, music and diversity. Forward thinking.”

“Welcoming, comfortable at home. Nice shops. Compact and clearly marked, walkable, navigable – you’re sure where you are.”

“It has history (Ayr Mount), nice shops and good restaurants.”

“A neat, walkable area with restaurants, shops, unique jewelry, Ayr Mount. Nature trails, Eno River walk.”

“There’s a lot going on – unique shops, great restaurants and great nightlife. Progressive – theaters, writers, book signings.”

“A cool, little town with a lot going on – Last Friday’s, Hog Day, re-enactments, colonial capital, Confederacy, Constitution Conventions, Indians at Eno River. We all get along.”

Challenges and Opportunities Facing Hillsborough

There are a number of challenges and opportunities that we identified based on the interviews with the internal audience, some that go beyond the scope of marketing communications. It is important to remember that your brand is a promise. It is critical that you live up to the expectations that this promise creates. The challenges below represent areas that fall within the realm of our marketing assignment:

1. **Heritage First**: Recognizing and embracing the “heritage destination” brand. This is Hillsborough’s true point of distinction. Hillsborough has lots of other interesting attributes that should be marketed, but it all builds on the foundation of history.
2. **Commitment**: The business, government and non-profit communities need to come together and agree that tourism is not only a good thing for Hillsborough, but a high priority moving forward. Developing a full-time approach to servicing visitors is critical. The chamber of commerce and many businesses currently have limited hours. Visitors get the wrong message when they arrive and the town is not open for business.
3. **Way Finding Signage**: Way finding, in particular, is critical to growing Hillsborough’s tourism industry. This means establishing a visual connection from outlying areas to downtown and the historic district. This should be done through the application of a high quality way finding system.
4. **Maximize Existing Opportunities**: Leveraging what you’ve got – assets such as incredible press coverage, established events and a reputation as a historic destination. You don’t need to invent a lot of things to market.

5. Develop Quality Tools: This includes a high quality, new website that serves as a tourism portal for the town of Hillsborough. These tools must communicate Hillsborough's many brand assets in a highly professional manner, reinforcing the brand look and personality.
6. More Consistent Communication With Constituents: Past visitors to Hillsborough are prime prospects for return trips, and just need to be invited back to enjoy the many facets that make up the town's charm. They are also a good source for referral business.

Marketing Recommendations

Based on Jennings' research into perceptions of the Hillsborough brand, we put forth the following brand communications recommendations:

1. **HERITAGE FIRST**

Embrace and Celebrate The Heritage Brand

The main attraction for visitors is overwhelmingly the historic district. Hillsborough has a well-developed reputation as a historic area. Many communities would love to have the established reputation that Hillsborough already possesses. This is a major draw, but the small town character and charm make Hillsborough more than just a heritage destination. While it makes sense to emphasize the strong links to history, the boomer market is attracted to the Churton Street experience for its dining/shopping/antiquing/music and arts. The authentic, small town charm with its laid-back approach is just the escape that visitors are looking for after a busy, stress-filled week. There is strength and power in knowing who you are – an authentic historic area with the charm of unique shops and restaurants that make for a complete visitor experience. One caveat: A common sentiment that we heard is to keep the town a secret to preserve its charm. This sentiment is in direct opposition to those who seek to bring more visitor business to the area.

Verbatims from One-On-One Interviews

"It's unique because of its specific history and sense of place."

"While the historic aspect is still #1, it's becoming a more complete experience, combining Ayr Mount tour with shopping and lunch. Last Friday's is fast becoming the most popular drawing 1,000 people and helping the restaurants (pay the rent in one night's business)."

"The historic district is number one. The buildings are compact and walkable. The tree-lined streets give it a sense of place. You can shop, eat and have a

complete experience. The cultural arts are a unique attribute of the people – performances, visual, festivals.”

“We need a central point – a parking lot and a tour of what we are marketing. There’s a need for a central business group, with everyone on the same page. A vision with all efforts coordinated.”

“It is equally important that there is a legitimate depth to each marketed element to offer visitors a complete experience. Too many shallow appeals lead to confusion and disappointment.”

“Visitor growth needs to be accommodated by services. The worst thing you can do is to market, market, market and don’t have anything for people to do. You need places to send them. Visitors need a complete experience, more than a one-dimensional experience.”

Verbatims from Visitor Intercepts

Visitors that were interviewed were drawn to Hillsborough as a heritage destination, but also planned to take part in other activities and enjoy the small town atmosphere.

“We’ll explore the historic sites that we can find on our own and browse around downtown. If we see something good downtown, we’ll stop in for lunch.”

“We’ll walk around Main Street a little and find somewhere to eat lunch. We just left the Vietri Outlet, and that was fun.”

“We are going to the speedway, the bookstore and plan to look around Main Street. We haven’t decided if we’re going over to Bandido’s or the Flying Fish for lunch.”

2. COMMITMENT

Develop a Consensus with the Internal Audiences and Streamline Communication

Hillsborough currently lacks a focused commitment to marketing tourism and accommodating visitors. A focused effort will bring a more consistent return on investment. The commitment to tourism will need the cooperation of non-profit organizations, governmental bodies and the business community. While many in the community recognize that they have a vested interest in visitor business, one body needs to take ownership of the tourism brand. And the commitment to tourism needs to be a higher priority within the community. That commitment needs to be obvious to the visitor in their experience. It should be reflected in the

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welcoming atmosphere, the accommodations, the website, signage and literature to help guide their experience, the guided tours, and in the shops and restaurants that are open for business. Based on our findings, we believe there is a significant opportunity for Hillsborough to improve the visitor's experience and therefore drive more positive word-of-mouth business.

Coordination and communication are key elements in creating successful visitor experiences. By letting everyone know what's happening, you can increase the chances that visitors will experience all that the town has to offer.

Cooperation among the many organizations with a vested interest in visitor dollars will help Hillsborough to avoid lost opportunities for building repeat business. Indications are that efforts could be more organized and better coordinated, and that there is a lack of communication among interested parties.

Verbatim Responses

"I arrived at the Old Court House to find that court was being held, there was a leak in the roof and the air conditioning was broken. People in the courthouse didn't know about my meeting there, and sent me to the new courthouse. I worked with Donna at The Big Barn and held the meeting there." (Planner for writer's conference)

"The hours of the town are spotty."

"There are part-time storefronts. On Fridays stores are closed early, and are closed Sunday and Monday. The area is half alive, half open."

"There is a tendency to have a small group of people know a lot about what's going on – we need to get the word out to more people. A little communication would be helpful (e.g. didn't know about the recent family reunion). We need a clearing house of information and event planning."

"People keep great ideas to themselves – we need to collaborate better. There are 33 in the merchants association. We need help to change; we try to do too much with limited resources."

"We need to come across without an agenda. We're all in this together, and no one group should serve their own agenda. There needs to be more trust and cooperation."

"We're good at putting things together and we need to do more of it from March through November (take advantage of the calendar). Restaurants have developed e-mail lists and could combine and share with Tourism."

3. WAY FINDING SIGNAGE

With a focused effort on heritage tourism or tourism in general, comes the need for a more organized approach to servicing the visitors that come to town. This starts with welcoming people into town and pointing them in the right direction with attractive and informative signage. Hillsborough should appear to be a town that is expecting visitors and anticipating their needs. Every path leading to town should have readable signage displaying a consistent brand look. This requires attractive and visible gateway signage at each entrance (major corridor) to Hillsborough; Interstate gateway signage on I-85 and I-40; and smaller trailblazer signs that direct visitors to specific destinations (Visitors' Center, Occoneechee Village, Ayr Mount, and Orange County Historical Museum – to name a few). Ideally, we want visitors to arrive in Hillsborough safely and with a sense of being valued (and expected).

Current efforts resemble a loosely connected group of unrelated events and activities, like a patchwork quilt. The brand identity needs to be embraced and celebrated. Currently, nondescript signs welcome visitors to Hillsborough and the historic character is not reflected until you are close to the downtown area. Historic markers are worn and look neglected. There is not a visual connection from one end of town to the other. There is a two-mile gap before visitors coming off of Interstate 40 are reassured that they are at the right place. There is no identifiable Hillsborough logo that portrays the historic nature that is at the core of the visitor experience. And there is nothing to notify the visitor of the area's significant points of interest. Standardized signage throughout town and at key venues can promote upcoming events and allow for cross-promotion to visitors.

With the growing popularity of events, we recommend using every opportunity to promote what's happening in town including banners in the downtown area. You want to make people think that you're expecting them and that you're excited to have them visit. Be open for business and don't disappoint visitors by not following through with appropriate service. There is an investment attached to attracting visitors to the town, and every successful visitor experience can bring repeat business and referral business.

Verbatim Responses

"Signage needs to be consistent and distinctive like downtown Durham's new efforts."

"There's not a game plan for visitors. They don't know where to go, what to do, and are confused. Elements are spaced out, people can't walk from one area to another. You can't park your car and walk to see everything."

"The walking tours need to be done on a more regular basis. It does more for local people. The Chamber brings in groups at Christmas and on Hog Day. They need to have Revolutionary War re-enactments on a more regular basis. They can add flower pots downtown and clean the sidewalks."

“A lot go to the Chamber for information – Chamber and Tourism need to be in the same office.”

4. MAXIMIZE EXISTING OPPORTUNITIES

More can be done to market what Hillsborough already has. It is obvious that people don't know all that the town has to offer. This applies to visitors from around the state, and to residents of Chapel Hill and Durham. There are genuine attractions that exist currently without having to create new venues or reach out to new markets. Better and more coordinated promotion can make these events and activities deliver higher returns. There is a definite need to coordinate with retailers and area businesses so that the town is always open for business at the opportune times, by coordinating store hours with peak visitor periods.

Leveraging the attention you receive in the press will pay off as well. The recent article in the June issue of *Our State Magazine* generated interest and drove people to the website for more information. That is the kind opportunity that can be leveraged to generate a much larger return.

Verbatim Responses

“We need to publicize the area – people in Chapel Hill don't know we're here. Add more events like Last Friday's, Hog Day, re-enactments, May Garden Show, the carriage rides in December.”

“People don't know that's there is so much here.”

“We need to boost visibility. We're only 12 minutes from Durham and Chapel Hill. People (especially Chapel Hill) don't know how close it is.”

“To be even better, we have to have long enough lead times to maximize promo and cross-promo opportunities.”

*“After reading *Our State*, I went to their website and found some links ... I eventually ended up at the Hillsborough Chamber website.”*

*“We read about Hillsborough in *Our State*. We heard that there are Civil War sites and a few antique shops.”*

*“Well, we always get *Our State* magazine and I sit and read over the entire issue every month. I happened to come across an article talking about Hillsborough.”*

5. DEVELOP QUALITY TOOLS

Every brand touch point should reinforce the brand personality and carry the brand look. Whether in print or online, the messaging for Hillsborough needs to be consistent. The Internet is a vital brand touch point as visitors plan their trip

itineraries online to be sure to maximize their leisure time. We need to make the website convey the relaxed, comfortable feel of a stroll down Churton Street while communicating the vitality of the community. The look of the site should offer easily accessible content covering all there is to do in Hillsborough.

6. DEVELOP CONSISTENT COMMUNICATION WITH CONSTITUENTS

There is a need for more formalized processes/systems for communicating with past visitors and people who have expressed an interest in Hillsborough. Visitors told us that they would like to receive information and would welcome mail or e-mail about events. You've already established a good impression, and more information about events and activities will only help to build repeat business.

Verbatim Responses

"I would like information about events coming up, especially before Hog Day comes around again."

"Online info or print materials would be great. We are thinking of checking out Hog day when it comes around again."

"That would be great. We'd love to hear more about what to do for our next trip."

Media Relations Opportunities

We began this study with the assumption that an enhanced media relations program would be one of the recommendations involved in growing the Hillsborough destination brand. In fact, securing media coverage is one of the areas where Hillsborough excels.

Securing press coverage is a first step in a much longer process. An important second step is adding life to the press coverage by making the articles (and links to articles) available to visitors and potential visitors. For that matter, press coverage in publications such as *Our State Magazine* should be merchandized to internal and external audiences. How do you do this? You make nice reprints of the articles available throughout town. You have PDFs of the articles available for download on your website (first secure reprint permission). And you make links available on your website. When a great article comes out, send an email blast to internal and external brand constituents, and draw attention to the feature. The reality about press coverage is that it is here today and gone tomorrow. Our job, as marketers, is to add value to the coverage by extending its lifespan.

We also recommend that Hillsborough use electronic news services to distribute press releases online, in addition to the current methods you are using. Two that

we recommend are dbusiness.com and CarolinaNewsWire.com. These will improve Hillsborough's online presence with search engines.

Hillsborough Visitor Intercepts

Immersing ourselves in what visitors are actually seeing and doing is critical to understanding the perception of the Hillsborough brand. General travel and tourism demographics only tell part of the story. While structured surveys provide a large amount of data as well as being cost-effective, they sometimes do not offer enough room for the respondent to elaborate on their answer and provide the detail and rationale for their response. Meeting and interacting with people on the street in a low-stress situation provides valuable insights into their decision to visit Hillsborough and their motivations for visiting tourist areas across the state. We covered the standard areas in our one-on-one intercepts and at the same time participated in a natural conversation where the visitor was able to make clear his/her thoughts about their time in Hillsborough. It's vital in evaluating the brand to understand why people visit, the various activities they participate in and the steps they took to arrive at the destination.

Summary of Visitor Intercepts

- **Where From:** The surrounding areas provided the bulk of the visitors including near-by Chapel Hill, Durham, Carrboro, Pittsboro, Cary, Raleigh and Efland. Visitors also came from Angier, Rougemont, King, Burlington and Shenandoah in North Carolina. In addition, visitors came from New York, Virginia and South Carolina.
- **What attracted them:** A variety of reasons including friends, shopping, *Our State Magazine* article, Farmers' market, antiques, auction, bike race.
- **Length of Visit:** Almost all were here for the day, with a few staying for an extended stay with family.
- **Itinerary:** Answers were varied but almost always included staying for a meal. People specified Farmers' Market, speedway, bookstore, historic sites, shopping, walking tour, shopping, Eno River, Vietri outlet, wildlife photography, auction as reasons for their visits.
- **How Often They Visited:** The majority (62%) had been here before, with 38% first time visitors, including people who knew about the area from driving through. The majority of visitors were focusing on Hillsborough for the day, with a few visitors heading for Chapel Hill later on.
- **How They Heard About Hillsborough:** Either they knew about the area from friends, from living close-by or from driving through town previously.
- **Using The Website:** 40% were adventurous and just showed up. The other 60% used various sites including the Alliance site, Google, The Chamber of Commerce, Orange County, WFMY and Chillkids.com

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- **Open to Receiving More Information:** 50% would like to receive more information, including event information on Hog Day.
- **Other Areas They Visit:** Visitors cited locations in North Carolina, Virginia and South Carolina. These included:
 - Seagrove, Sanford, Edenton, Old Salem, Mount Airy, Asheville, Fayetteville, Mebane, Wilmington, Cameron, Lexington, Black Mountain, Henderson, Washington, Bath, Murfreesboro, Greensboro, Fearington, Danville, Monticello, Outer Banks, Charleston, Pinehurst, Aberdeen, Margaret, Carthage, Asheboro, Falls Lake, Jordan Lake and Biltmore. More information on competitive visitor destinations is included later in the report.
- **Areas of Interest:** These included history, shopping, hiking, antiques, lakes, beaches and pottery.