



Strategic
Marketing &
Research, Inc.

HENDRICKS COUNTY PRODUCT & MESSAGE DEVELOPMENT

RESEARCH FINDINGS

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BACKGROUND & OBJECTIVES

The Hendricks County Convention and Visitors Bureau is developing a strategy to help guide the Bureau and the County toward a more profitable future – by increasing tourism to the area. To develop its strategy, the Bureau must know what types of products and packages will motivate visitation to Hendricks County.

This research study was designed to evaluate current familiarity and usage of Hendricks County as a leisure destination, identify travel criteria for the Bureau's target audience and determine how to package available product. This *qualitative* assessment of product ideas addresses the types of trips of interest to consumers, details what travel segments offer the greatest potential and assesses potential communication messages.

The specific information goals of this research include:

- *Assess the overall image and familiarity* of Hendricks County among target audiences;
- *Investigate the current Hendricks County visitor* relative to demographics, trip activities, and travel motivations;
- *Gather information on targeted visitor groups* and their destination preferences and travel motivators;
- *Distinguish product options* which offer the greatest potential;
- *Identify the best position for Hendricks County* to adopt and the best way to communicate this message; and
- *Provide conclusions and recommendations* regarding options for future marketing programs.

METHODOLOGY

The goal of this research was to explore the manner by which the Hendricks County CVB can develop its resources to attract additional visitors. In the past, CVB's have focused on the marketing of existing attractions; now, CVB's are moving toward development efforts - working to create products in their communities that are desired by potential tourists. As such, this research was designed to gather a broad-based overview of consumers' attitudes toward Hendricks County and several product development options. In addition, with this effort, the CVB will have a benchmark for measuring progress over time.

This research was conducted via on-line surveys. For participation, the respondents were screened for taking at least one, leisure trip per year and for being involved in deciding/selecting travel destinations. Two distinct groups were surveyed – those within 250 miles of Hendricks County and those who were identified as race enthusiasts. The racing sample was included to assess this existing market. While race enthusiasts are a small percentage of the general market, they are an established segment for Hendricks County. While the general survey was unlikely to identify an adequate sample of racers to explore their preferences, by including those who requested racing information from the county and O'Reilly Raceway Park, an adequate sample could be achieved.

Survey Sampling International provided e-mail addresses which matched the geographic requirements, and potential respondents were sent a link to the survey housed on our server. The racing leads were sent a link to the same survey.

To gauge familiarity and travel criteria, 1,008 surveys were completed -- 751 from those living within 250 miles of Hendricks County and another 257 by those who had requested racing information. The surveys were completed in September 2006. A copy of the survey appears in the Appendix to this report.

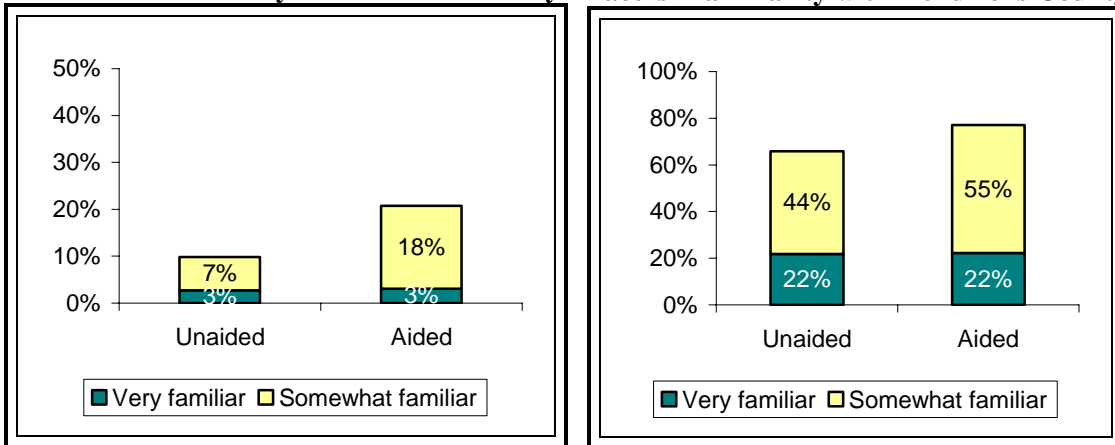
FAMILIARITY & USAGE

While Hendricks County wants to package existing attractions and develop new products for marketing, it is important to first review existing familiarity, usage and overall image on behalf of the sampled group. This will aid in assessing the existing scenario and identifying issues which will help in motivating visitation. Moreover, these results will provide a baseline measure of attitudes and familiarity which can be used to assess progress over time. For example, as the CVB increases its advertising and marketing efforts, it should expect to see increases in familiarity and interest in visitation.

Throughout this report, those respondents who were leads of Hendricks County or O'Reilly Raceway Park will be separated from the rest of the survey sample. Because they have requested information, they have some level of familiarity and likely, past visitation. Their racing interest has an impact not only on their perceptions of the County but also on the types of products in which they are interested.

While the racing enthusiasts claimed a great deal of familiarity with Hendricks County, the general traveling population did not. Only 10% of the general traveling population claimed to be very or somewhat familiar with the County, while 66% of race enthusiasts had some level of familiarity. Those who claimed to be unfamiliar with Hendricks County were then asked to rate their familiarity with specific towns. When the towns of Avon, Brownsburg, Danville and Plainfield were given as prompts, the somewhat familiar rating increased 11% on behalf of both travelers and racers.

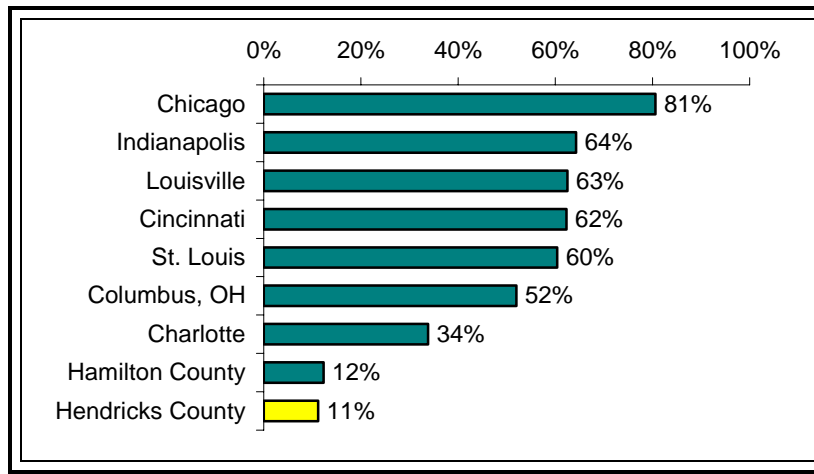
Travelers' Familiarity of Hendricks County Racers' Familiarity with Hendricks County



This finding is significant because potential visitors are aware of specifics such as towns and attractions. Though some counties, e.g., Brown County, Indiana, and Bucks County, Pennsylvania, successfully market themselves, the geographic boundaries which determine county lines are not important to consumers. This suggests Hendricks County should market developed products and packages rather than market the County name. By finding the core elements of appeal, Hendricks County can profitably feature its attractions.

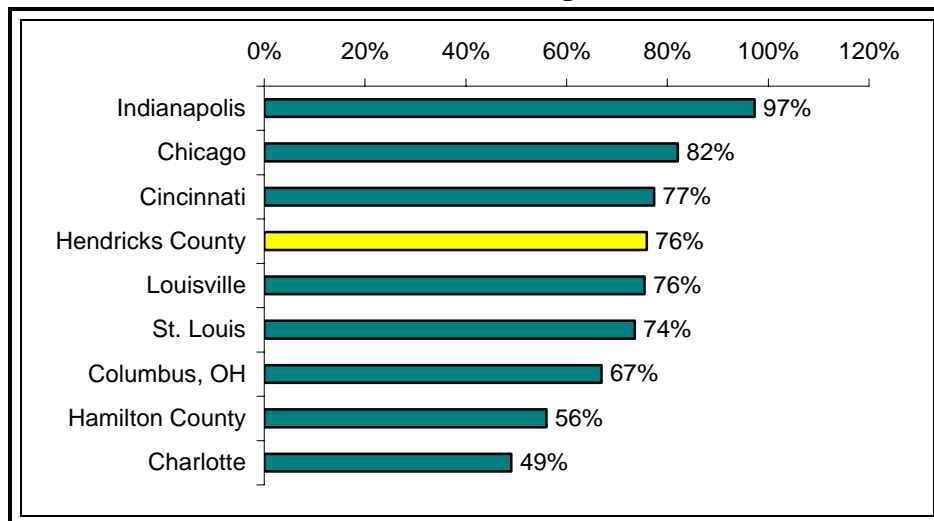
The stated lack of familiarity is partially the result of non-visitation or usage. Just 11% of the general population respondents had ever visited Hendricks County, and only 8% had visited within the past five (5) years, meaning that 92% visited over five years ago or not at all. Though Hendricks County received the lowest visitation of all its competitors, it is encouraging that its visitation was similar to that of Hamilton County, which has been in existence twice as long as the Hendricks County CVB. The rest of the competitive set includes far larger cities with well known attractions and significant marketing budgets.

Prior Visitation among Traveling Public



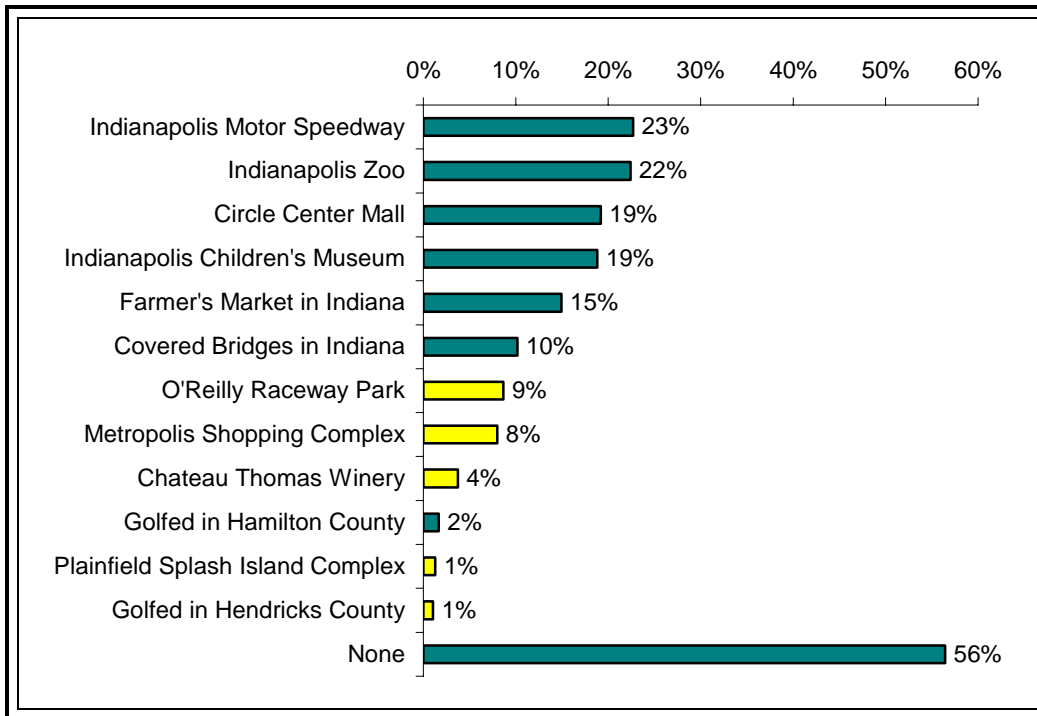
The travel pattern for racers differs significantly from that of the general public. Because the competitive set was based on destinations with well known race tracks, it is not surprising to note heavy visitation to those Midwestern cities, including Hendricks County. Again note that the racing respondents were requestors of information and were more likely to travel the County anyway. Aside from the level of Hendricks County visitation, also note that 97% of racers have been to Indianapolis – likely making them a stronger target for future visitation.

Prior Visitation among Racers



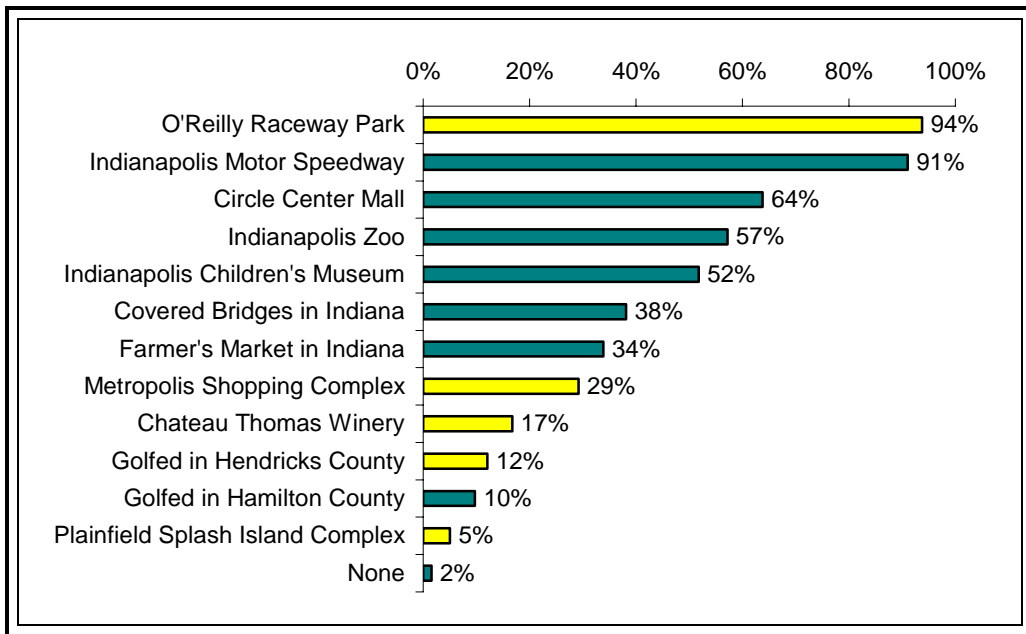
It is also important to consider visitation to individual attractions to gauge familiarity with the Hendricks County product and to discern the types of travel products in which visitors may be interested. While research for the city of Indianapolis has consistently shown the top local attractions to be the Indianapolis Zoo, Children’s Museum and Circle Centre Mall, the Indianapolis Motor Speedway (other than the Museum) has never been considered in research conducted by SMARI. Interestingly, in this research, the Speedway has been visited more often by travelers than any other local attraction. Though this could be viewed as a positive for Hendricks County and the potential for racing product, it is important to note that the Indianapolis Motor Speedway is iconic of the city and could be considered a “must see” by visitors, even if they do not have an interest in racing. As such, they would not be open to other racing attractions.

Previous Attraction Visitation by Travelers



Given that past visitation by the racing sample differed drastically from that of the general traveling population, it is not surprising that those respondents have visited attractions in Hendricks County far more often as well. And given that the source of the sample was those who requested information from Hendricks County or O'Reilly Raceway Park, it was to be expected that a large percentage would have visited the track previously. It is encouraging to note that those who race are willing to visit other types of attractions, though it is not known if they do so during the same trip.

Previous Attraction Visitation by Racers



While racing enthusiasts claim higher levels of familiarity and usage, Hendricks County is virtually a blank slate among the traveling public. Low familiarity and visitation result in weak imagery. While this is a disadvantage in the short term, it does represent opportunities to identify beneficial images and develop products and marketing efforts which can educate consumers via messages designed to increase interest and visitation.

TRAVEL CRITERIA & IMAGE

Myriad elements are used in developing the image of a local tourism destination. One of these is convincing people that the area offers attractions which will make their trips enjoyable. These range from perceived affordability to restaurants, nightlife, and other activities. The process of building imagery involves educating people and convincing them that Hendricks County is a destination worthy of consideration. The goal is to ensure that the County is part of the consideration set when people are choosing a leisure destination. To begin shaping packages and products, the County needs to know what activities consumers consider important when they select a leisure destination.

The respondents were asked to evaluate nineteen (19) attributes and rate their importance in the decision-making process. A 5-point scale was used, where the higher the number the more desirable the activity. Scores of "4" or higher represent very desirable activities. Scores between "3.5" and "4" indicate strength, and scores between "3" and "3.5" indicate average performance. Scores below "3" indicate weakness.

To better evaluate the activities which consumers consider important, they were grouped into four clusters – *convenient*, *charming*, *active and luxurious* – based on the strengths of their ratings relative to other attributes. The higher the ratings, the more important the activities are to a broad audience. To evaluate what is important to travelers versus the racing enthusiast sample, the ratings from both groups were broken out.

The *convenient cluster* garnered the highest ratings of any other group. These are the core attributes, or basics of any trip. Both travelers and racers want a destination which is affordable and fun while being comfortable and easy to get to – these things are considered “musts” for a leisure trip. For both trip types, the most important attribute is that a destination is fun – in creating a brand and marketing messages, the CVB must communicate that the County is a fun place to visit.

Convenient Cluster

Attributes	Travelers	Racers
Is a fun place to visit	4.4	4.4
Is an affordable place to visit	4.4	4.3
Is a comfortable place to visit	4.3	4.1
Has a wide variety of places to stay	3.9	3.8
Is easy to get to	3.9	3.7

Given the high scores generated by the *convenient* attributes, these are considered the “price of entry.” People will not consider a destination which does not perform reasonably well in these areas. At the same time, since many destinations meet these criteria, other attributes tend to differentiate one place from another. The remaining three sets of attributes relate more significantly to specific elements which people desire in various types of travel experiences.

Given the especially high ratings recorded for the *convenient* attributes, dramatic drops are noted for the other cluster attributes. Consequently, the ratings for two attributes, which are over “3” within the *charming* cluster, are significant. While not the most important features of a leisure trip, historic attractions and quaint communities still interest travelers.

Charming Cluster

Attributes	Travelers	Racers
Has lots of historical sites and attractions	3.4	3.4
Has lots of quaint, interesting small communities	3.1	2.9
Has farm markets or wineries	2.4	2.3
Has lots of antique shopping	2.1	2.0

While the *charming* cluster includes attributes which could appeal to a wide variety of leisure travelers, the *active* cluster is highly specialized. These include attributes which likely appeal to only a small portion of potential visitors. This is evident when travelers are compared to racers. Attending a race is highly important to that segment, while it is not all important to most travelers.

Active Cluster

Attributes	Travelers	Racers
Has lots of activities for families	3.3	3.1
Has lots of places for outdoor recreation	2.8	2.8
Has lots of auto/racing attractions	1.7	4.0
Has lots of golf courses	1.6	1.5

Finally, the *luxurious* cluster contains attributes – excluding restaurants – which do not generate high ratings but are activities which could appeal to a limited number of travelers. Again, the exception is having quality restaurants. This attribute is important to the traveling public as well as racers.

Luxurious Cluster

Attributes	Travelers	Racers
Has many fine restaurants	3.1	3.1
Offers an upscale travel experience	2.7	2.5
Has lots of nightlife	2.4	2.5
Has a variety of luxury places to stay	2.4	2.3
Has lots of upscale shopping	2.3	2.2

These ratings highlight the best ways to promote a destination overall. First, the destination must be perceived as fun, affordable, comfortable and easy to get to. It is also important to reassure people that a variety of lodging and dining options is available. Several attributes can be promoted to reach a wide audience – namely history and small towns. Other product, such as racing attractions, farm markets and shopping tend to be niche markets.

Not only is it good to know what visitors want in their leisure travel, it is important to know how Hendricks County is viewed against those attributes. Obviously, for marketing to be successful, it must be believable. Consequently, the traveling public that claimed to be very or somewhat familiar with Hendricks County rated the County on these same attributes. The best way to consider these County ratings is to compare the importance ratings to the County ratings. If they are similar, they indicate that the County delivers the *right* level. When the importance rating is higher than the attribute rating, this means that the destination falls short of what is desired, and when the destination rating is higher than the importance rating the area over-performs to some degree. As such, these areas can define the image of the County.

When comparing *convenient* attributes with how Hendricks County is perceived, the sole characteristic that meets the importance level is “*easy to get to.*” Given that Hendricks County was in the center of the survey sample, this result is not surprising. However, it is rather discouraging that those who were very or somewhat familiar with the County did not rate the remaining mandatory attributes higher. This suggests that one barrier to higher levels of visitation is that many people do not perceive that Hendricks County meets their minimum requirements. Hence, in addition to any product promotions, it will be critical to improve the overall image of Hendricks County as affordable, comfortable and fun – or to focus on specific niche markets. The biggest gap - and therefore the most critical need - will be promoting the area as a fun place to visit.

Convenient Image

Attributes	Travelers	HC Rating	Difference
Is a fun place to visit	4.4	3.4	-1.0
Is an affordable place to visit	4.4	3.6	-0.9
Is a comfortable place to visit	4.3	3.6	-0.7
Has a wide variety of places to stay	3.9	3.1	-0.7
Is easy to get to	3.9	3.9	0.0

Still, it is encouraging that the County pulls in higher ratings than the importance ratings for some of the *charming* attributes. However, the qualities considered most important to potential visitors, *having lots of historical sites*, generated lower ratings than importance. The County does seem to be characterized by *quaint small communities*. As this is an attribute which travelers consider somewhat important, it could be a point of differentiation for Hendricks County.

Charming Image

Attributes	Travelers	HC Rating	Difference
Has lots of historical sites and attractions	3.4	2.9	-0.5
Has lots of quaint, interesting small communities	3.1	3.4	0.3
Has farm markets or wineries	2.4	2.8	0.4
Has lots of antique shopping	2.1	2.9	0.8

Hendricks County’s image ratings are on par with or outscore importance for every attribute in the *active* cluster. Outside those attributes in the *convenience* cluster – which as discussed are often the “price of entry” to be part of a traveler’s consideration set – having activities for families is both important and is an attribute for which the County already has an above-average image. And while auto racing was not important to the traveling public, it does appeal to a smaller audience that is familiar with the racing product.

Active Image

Attributes	Travelers	HC Rating	Difference
Has lots of activities for families	3.3	3.3	0.0
Has lots of places for outdoor recreation	2.8	3.0	0.2
Has lots of auto/racing attractions	1.7	3.5	1.8
Has lots of golf courses	1.6	2.7	1.1

Because those attributes in the *luxurious* cluster did not rank high in importance and Hendricks County’s image ranks below average for each attribute, these are not likely strong communication points for the CVB, which includes upscale shopping. Though the County’s image for having upscale shopping is stronger than the importance rating, neither rating is strong.

Luxurious Image

Attributes	Travelers	HC Rating	Difference
Has many fine restaurants	3.1	2.9	-0.2
Offers an upscale travel experience	2.7	2.6	-0.1
Has lots of nightlife	2.4	2.4	0.0
Has a variety of luxury places to stay	2.4	2.6	0.1
Has lots of upscale shopping	2.3	2.6	0.4

When reviewing the attribute clusters and considering Hendricks County’s ratings against the importance ratings, it is crucial to note that in the *convenience* attributes, those considered the “price of entry,” are where the largest discrepancies lie. Hendricks County should consider these basics -- *fun, affordable and comfortable* -- the foundation for promotion. Since many of the other attributes have more limited motivational appeal, the best options for the County will depend upon the final targeting strategy and those whom the CVB decides offer the greatest potential. In fact, it may make sense to focus on different motivators for different groups.

To gain greater insight into matching the marketing efforts with specific audiences, we will review the various segments of the population and their travel motivators. First, we review overall reactions to the products which were evaluated.

PRODUCT DEVELOPMENT

This study explores consumers' reactions to a variety of product options which might be considered in Hendricks County. In fact, the survey respondents evaluated twenty-two (22) ideas – in two ways. First, they rated their interest in all 22 product options, using a scale from 1 through 5, where a higher number indicated stronger interest. Then, to force prioritization, each respondent was asked to indicate his/her top three options and then rank them in terms of which products would actually motivate them to visit. The goal of this dual process was to differentiate between activities with appeal versus those with motivational ability. For example, many people might like to shop while they are in an area, but they would not travel there simply to shop. Therefore, to assess the relative appeal of the activities, it is necessary to consider both the overall rating and the strength of motivation.

In the following, the strength of motivation is determined by the percentage of people that ranked each activity as one of their top three options. Because products that appeal to the traveling public differ dramatically from those that appeal to racing activity visitors, the two are evaluated separately. One challenge is that motivational appeal is fairly fragmented, as none of the options were rated in the top three listing by more than a third of the traveling public respondents.

These activities are listed by the overall mean score to facilitate the classification of those with broader appeal and those considered niche products. Yet, given the fragmentation of appeal, none of the product ideas received strong ratings by the general travelers. As such, the best option is to combine elements – likely through packaging – to strengthen their overall appeal.

Leisure Traveler Interests

As discussed, on a 5-point scale the goal is a score of at least 3.5, which indicates strength. Unfortunately, none of the proposed products reached this mark. However, scores of 3.0 to 3.5 are still considered above-average. For this reason, the initial set of products evaluated is made up of things that at least meet the 3.0 threshold.

While products in this first tier were considered interesting and therefore a travel motivator, some differences are noted. For example, though live music and theatre was the most interesting to travelers, a quaint downtown was the biggest travel motivator among all the products. At the same time, though a restaurant showcase was interesting, it was not considered motivating. As such, it is assumed that for marketing purposes this type of product should be paired with another activity considered motivating.

Travelers' Product Interests – Tier 1

Product	Rating	Motivation
Theater, live music or concerts	3.4	23%
Quaint downtown	3.3	29%
Large botanic garden	3.3	23%
Trail with historical sites	3.3	23%
Restaurant showcase	3.3	15%
Trail though working farms	3.2	19%
Visit a working farm	3.0	14%
Arts district with lots of galleries	3.0	17%

And while the interest ratings for Tier 2 are lower, some of the products are more of a travel motivator than those in Tier 1. Again, this is a good reason to consider development of packages that combine differing activities.

Travelers' Product Interests – Tier 2

Product	Rating	Motivation
Outdoor water park	2.9	17%
Package of family activities	2.9	20%
An upscale mall	2.9	13%
Winery trail	2.8	20%
Visit locally owned winery	2.8	9%
Visit a working dairy farm	2.7	7%

Finally, the lowest scoring products are closely aligned with the *active* cluster discussed earlier. Though these products do not have broad appeal, a small group of constituencies consider them both interesting and motivating – as will be reviewed when the race enthusiasts are considered.

Travelers' Product Interests – Tier 3

Product	Rating	Motivation
Canoeing or kayaking on river	2.5	12%
Trail for bicycling	2.5	7%
Visit a national museum	2.4	6%
Tour facilities of nationally-known race cars	2.2	9%
Attend a nationally sanctioned motor sports event	2.2	13%
Play golf at variety of courses	1.6	5%

Given the fragmented appeal of these products, it is important to consider their inter-relationships. Thus far, the research findings suggest that the best plan for Hendricks County may be to identify several package/product options which appeal to specific segments of potential visitors. First, it is useful to examine racers' interest in particular products as they vary dramatically from those of general travelers.

Race Enthusiasts' Interests

Predictably, those who requested information from Hendricks County or O'Reilly Raceway Park found race-related products both highly interesting and motivating. However, what is notable is the strength of that interest – all the ratings are over 4.0 and motivation is above 60%. Considering that the highest rating among general travelers was 3.4 and the strongest motivation for a product was 29%, these race product ratings are significant.

Racers' Product Interests – Tier 1

Product	Rating	Motivation
Attend a nationally sanctioned motor sports event	4.8	87%
Tour facilities of nationally-known race cars	4.4	65%
Visit a national museum	4.3	63%

However, racers are generally only interested in race product. Only two other products were rate above 3.0 – live music and quaint downtowns. Of these, quaint downtowns would motivate only 12% of the racing segment.

Racers’ Product Interests – Tier 2

Product	Rating	Motivation
Theater, live music or concerts	3.2	9%
Quaint downtown	3.1	12%
Trail with historical sites	3.0	5%
Restaurant showcase	3.0	3%

From there, the ratings in Tier 3 drop dramatically in terms of interest and motivation. Products that were considered Tier 1 for leisure travelers and were quite motivating do not generate interest among race enthusiasts.

Racers’ Product Interests – Tier 3

Product	Rating	Motivation
An upscale mall	2.7	3%
Visit locally owned winery	2.7	3%
Large botanic garden	2.7	2%
Trail though working farms	2.6	1%
Outdoor water park	2.6	10%
Package of family activities	2.6	5%
Winery Trail	2.6	9%
Visit a working farm	2.6	5%
Arts district with lots of galleries	2.5	4%
Canoeing or kayaking on river	2.5	3%
Trail for bicycling	2.4	7%
Visit a working dairy farm	2.2	1%
Play golf at variety of courses	1.7	4%

While Hendricks County would likely see increased visitation from packaging a variety of products from multiple tiers for general leisure travelers, racers would not likely be motivated by packages of products other than those related to race activities.

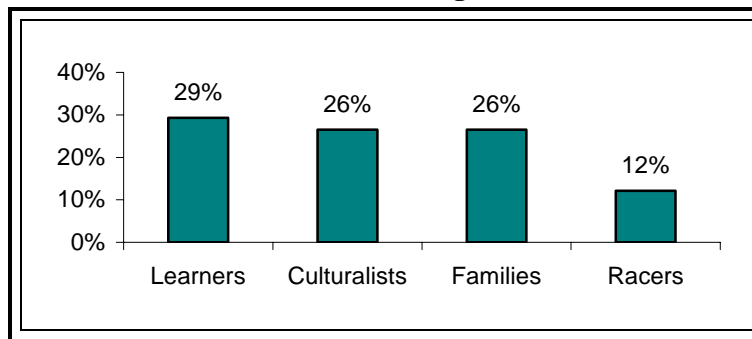
VISITOR SEGMENTS

To determine what types of activities should be bundled and promoted to particular types of travelers, segments were created. By considering the ratings for the product options and the activities which were grouped, four distinct groups result:

- Learners
- Culturalists
- Families
- Racers

There is fairly equal distribution among the top three segments, with Learners capturing a slightly larger share than Culturalists and Families. And while racers make up 12% of the population, this is still a significant percentage.

Distribution of Segments



While these groups are best identified by the activities they are likely to find appealing, demographic differences between the groups are noted. To determine which activities are preferred by each group, an index was created. With an index, a score of 100% indicates average performance and a score of 110 indicates 10% better than average. A score of 90 equates to 10% lower than average. Consequently, the attributes that rank well for each group are reflected in scores above 100. The following describes each group and highlights the best product options and combinations.

Learners: those who want some type of education element in their trip. This group is interested in more rural activities. They are interested in an authentic, small town experience.

Demographically, the segment is interesting because outside of the Families segment, they are the most likely to have children. In fact, with 31% having children under the age of 14, it seems that this group is interested in having educational experiences that they can share with young children. As well, a significant portion of the segment - 16% - has graduate degrees.

Though working farms earned the highest indices from the Learners segment, they did not generate the strongest ratings. This may mean that in order to attract this group the County will have to package a variety of activities to make a visit seem worthwhile. While visiting historic sites and working farms would not necessarily be a natural package of products, this group has strong interest in both.

Learners want...	Index	Rating
Visit a working dairy farm	133	3.4
Visit a working farm	131	3.9
Trail though working farms	131	4.0
Large botanic garden	124	4.0
Trail with historical sites	123	4.0
Quaint downtown	116	3.8

Culturalists: enjoy upscale experiences -- including the arts, food and wine, and shopping. This is a sought-after segment in that it is likely to comprise married couples with disposable income and no children. They are the most educated segment, with 21% having an advanced degree, and one of the wealthiest segments, with 22% earning over \$100,000/year.

In terms of promoting to this segment, the wine trail should likely be the featured product in any packaging. Dining out and shopping usually end up being included in a trip but are not likely selling points for generating travel. And while golf indexed highest for this segment, its ratings are quite low due to its limited appeal.

Culturalists want...	Index	Rating
Visit locally owned winery	134	3.7
Winery trail	133	3.7
Arts district with lots of galleries	129	3.7
Play golf at variety of courses	126	2.0
An upscale mall	122	3.5
Theater, live music or concerts	120	4.0
Restaurant showcase	118	3.9

Families: focus on ways to entertain their children. They are interested in high energy experiences like water parks but time as a family is most important – as is evident with high indices for more serene activities such as canoeing and bicycling.

This is the youngest of all the segments. They are likely married and 62% have children in the home – 52% with kids under the age of 14. This group earns slightly lower incomes and is the least educated segment – with 21% having a high school diploma or less.

Families want...	Index	Rating
Outdoor water park	136	4.0
Package of family activities	132	3.7
Canoeing or kayaking on river	119	2.9
Trail for bicycling	113	2.7

Racers: want race-related product and not much else, especially when considering a trip to Hendricks County. While the priority would be to see a race, as we saw earlier when looking at motivating activities, the segment is highly likely to combine a race visit with race-related attractions.

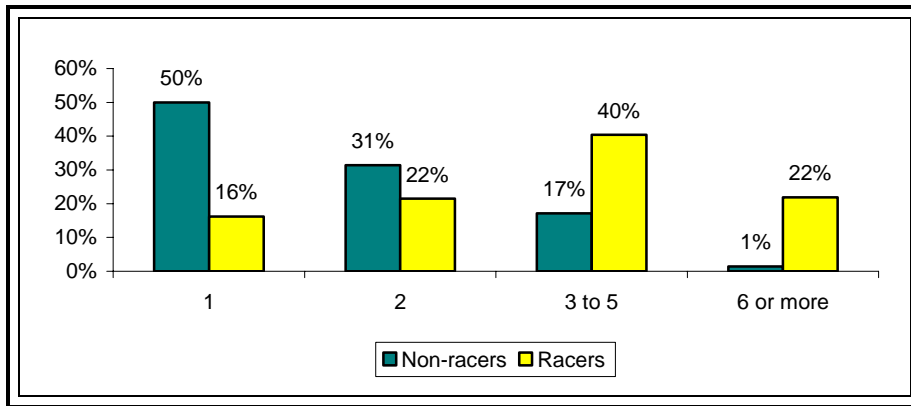
Demographically, the group is more likely to be married than any other segment, with 76% married, while just 39% have children. As racing – both as a participant and spectator – is an expensive sport, it is expected that the income levels for this segment are quite high – with 24% earning over \$100,000 annually.

Racers want...	Index	Rating
Attend a nationally sanctioned motor sports event	153	3.7
Tour facilities of nationally-known race cars	144	3.4
Visit a national museum	134	3.4

Given the importance of this segment to Hendricks County, it was evaluated further. While it is not surprising that 93% of those that requested information from ORP and racing information from Hendricks County have taken a race-related trip in the past, it is interesting that 16% of the general public travelers have taken such a trip. This indicates that the potential audience for race-related attractions could be much larger than just the racers segment.

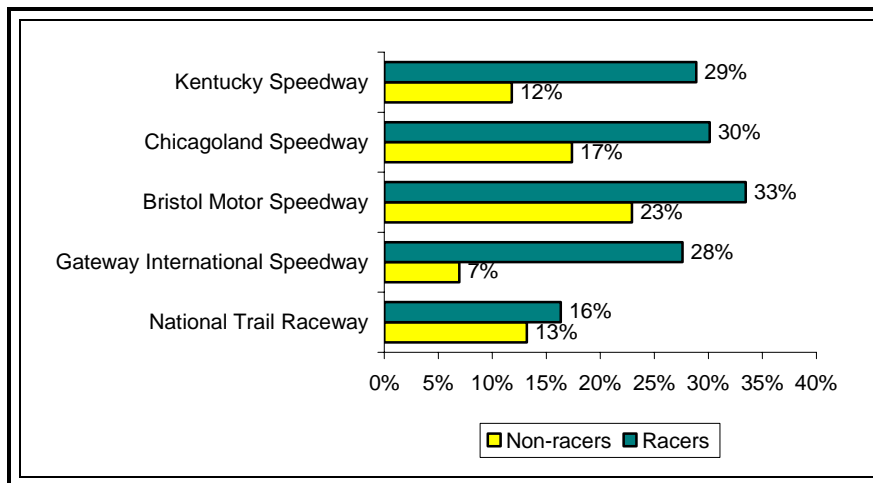
Of course differences in the quantity of race-related trips are noted between racers and non-racers. Of the 16% of the general traveling public that has taken a race-related trip, 50% of them did so only once a year. However, racers were more likely to take at least three trips annually where the purpose was auto racing.

Number of Race-related Trips Annually



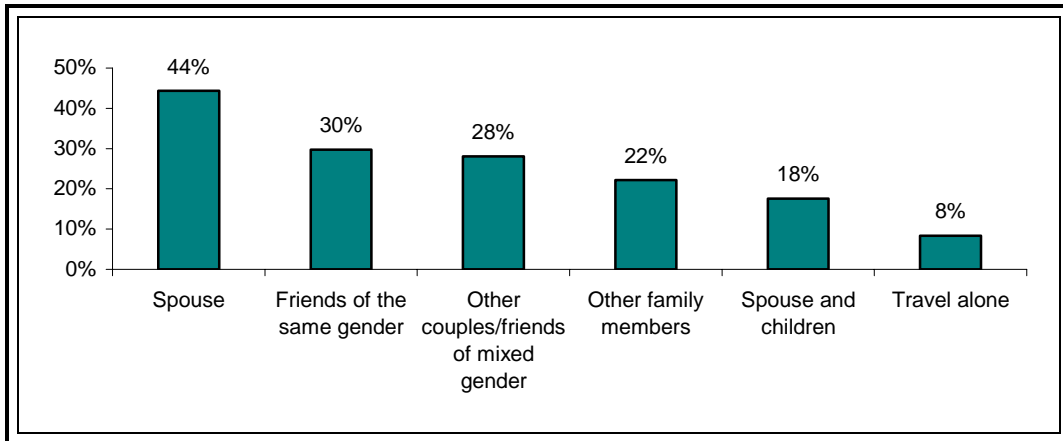
While the prior evaluation of attraction visitation compared racers and non-racers and their experience with the local tracks ORP and IMS, a comparison of the two groups and their visitation to other Midwest competitor tracks is seen below. While there is fairly equal distribution among racers and the tracks they have previously visited, because Bristol received such high visitation among non-racers, it is likely that NASCAR is attracting the general traveling audience.

Previous Tracks Visited



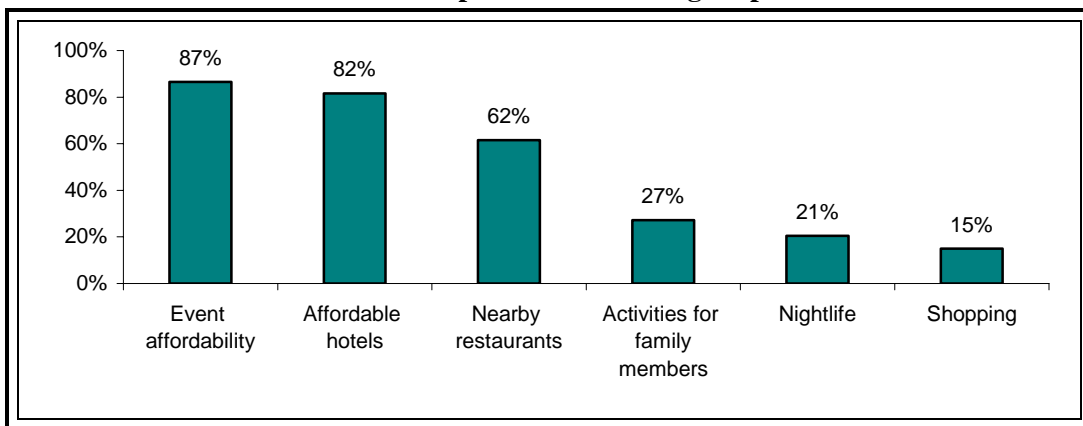
When creating marketing messages and images to communicate to the racers segment, it is important to know with whom they are traveling. Because the segment was given the opportunity to select multiple travel group types, it is difficult to discern exactly who comprises these travel parties. It is likely that racing trip travel parties often comprise both spouses and friends.

Racing Trip Travel Party



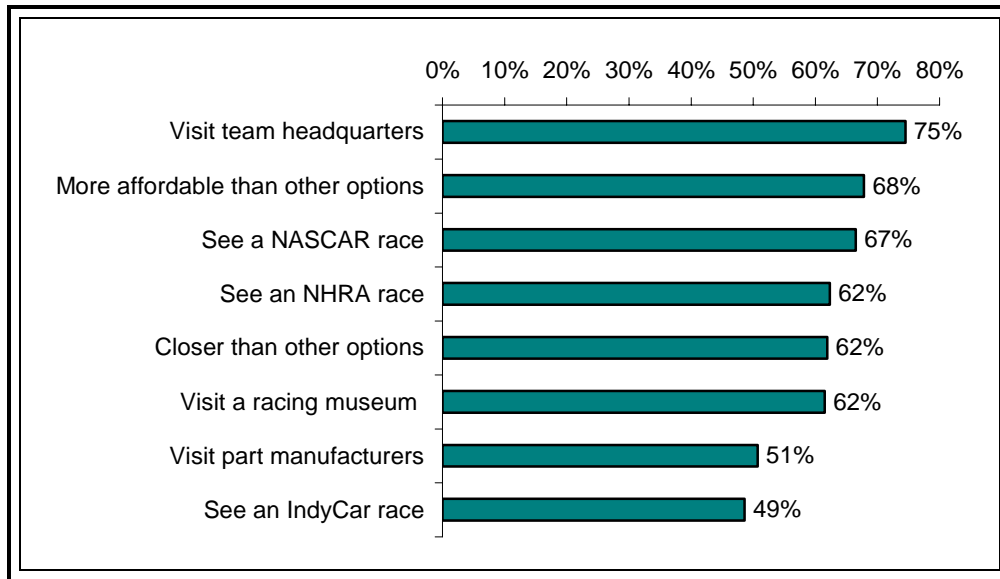
When considering a racing trip, the affordability of both the event and local accommodations are most important. While racers also want nearby restaurants, they are uninterested in any other trip activities. The graphic below shows attributes that racers considered very important or important elements of the race-related trip.

Elements Important to a Racing Trip



The biggest motivator to travel to Hendricks County for such a race-related trip would be visiting the headquarters of nationally known race teams – with 75% of the racers segment indicating such an attraction would influence their decision to visit. While other elements were considered influential, racers want to see a national race affordably.

Factors Influencing Race Trip to Hendricks County



PROMOTING THE PRODUCT

While the previous section reviewed the possible types of products Hendricks County could develop or package for targeting particular groups, there must be a consistent marketing message behind the promotion of these products. As such, the CVB wants to brand the County with a logo and tagline for leisure travelers.

Hendricks County forwarded three possible logos for evaluation, and respondents were asked to rate each on several communication goals and outcomes. Given that the outcomes require action on behalf of the consumer – something difficult to accomplish – it is much more difficult to garner high ratings for this measure. After evaluating hundreds of advertisements and their communication outcomes, SMARI has found that a...

- Score of 3.8 to 4.0 is **excellent**
- Score of 3.5 to 3.8 is **good**
- Score of 3.3 to 3.5 is acceptable

The first logo evaluated - Indiana's Fast Track to Fun - generated only one measure which was considered in the acceptable range. Especially discouraging for this logo is that its ratings for the outcome of motivating consumers to visit the County falls below 3.0.



Communication Ratings

Engaging	3.0
Action packed	3.2
Unique	3.1
Welcoming	3.3
Fun	3.2
Lively	3.2
Memorable	3.0

Outcome Ratings

Learn more	3.0
Go to Website	2.9
Visit	2.7



The second logo consumers' evaluated, A Change of Pace, was able to move a single communication goal in the “good” range. But still, this logo is not does not motivate consumers to take an action, especially visit.

Communication Ratings

Engaging	3.2
Action packed	2.8
Unique	3.2
Welcoming	3.5
Fun	3.0
Lively	3.1
Memorable	3.1

Outcome Ratings

Learn more	3.0
Go to Website	3.0
Visit	2.8



The ratings for the final logo - Fast Track to Family Fun - exceeded the threshold for effectively communicating a desired message. While it is more difficult to rate high on outcomes, the ratings for the Fast Track to Family Fun remain low. Because two of the measures center on gathering more information, it would likely be an effective tool to include the County’s Website in all usage of the logo.

Communication Ratings

Engaging	3.6
Action packed	4.0
Unique	3.6
Welcoming	3.6
Fun	4.0
Lively	4.1
Memorable	3.6

Outcome Ratings

Learn more	3.3
Go to website	3.3
Visit	3.1

While the outcome ratings lag, the use of *Fast Track to Family Fun* will better communicate the messages which Hendricks County hopes to promote, Furthermore, it is likely to generate better outcomes than the other logos evaluated. A side-by-side comparison shows that by including the word *family* and a more whimsical font treatment, Hendricks County can more effectively communicate the desired messages.

Communication Ratings

Message	Fast Track to Fun	Change of Pace	Fast Track to <i>Family Fun</i>
Engaging	3.0	3.2	3.6
Action packed	3.2	2.8	4.0
Unique	3.1	3.2	3.6
Welcoming	3.3	3.5	3.6
Fun	3.2	3.0	4.0
Lively	3.2	3.1	4.1
Memorable	3.0	3.1	3.6

Outcome Ratings

Message	Fast Track	Change of Pace	Fast Track to <i>Family Fun</i>
Learn more	3.0	3.0	3.3
Go to Website	2.9	3.0	3.3
Visit	2.7	2.8	3.1

VISITOR PROFILE

To effectively target marketing messages, it is important to know what type of person – racing enthusiast or general traveler – is already visiting Hendricks County. Below is a current visitor profile for those who have visited the County. The use of the term “Racer” in this context does not relate to the racer segment described above. This term simply represents those who requested race-related information from ORP or Hendricks County and have actually traveled the area.

Profile	General Traveler	Racer
Marital Status		
Married	60%	75%
Single	25%	9%
Separated/Divorced	9%	14%
Widowed	6%	1%
Education		
Less than high school	1%	1%
High school graduate	16%	14%
Some college or technical school	38%	40%
College graduate	29%	27%
Graduate work/advanced degree	15%	18%
Income		
Less than \$50K	44%	23%
\$50K but less than \$79,999K	31%	30%
\$80K but less than \$99,999K	12%	25%
\$100K but less than \$124,999K	10%	15%
Over \$125K	4%	8%
% With children	37%	39%
Average Age	45	48

APPENDIX

Questionnaire

Hendricks County Convention & Visitors Bureau Image and Product Development Assessment Draft – August 29, 2006

Thank you for visiting our travel survey. Your opinions are valuable to us!! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:

For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.

If you need to go back to the preceding question to change your response, click on the Previous button.

For some questions, you will need to scroll down to respond to all the questions on a screen. To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- You
- Your spouse/partner (TERMINATE)
- Jointly with your spouse/partner
- Someone else (TERMINATE)

S2. Thinking of all the non-business trips you have taken in the past two years, how many have you taken? [_____] **IF NOT TAKEN ANY NON-BUSINESS TRIPS, TERMINATE.**

1. Please think about when you are choosing a destination for a nearby leisure trip. How important are each of the following in your choice of a destination?

	Not at all important	2	3	4	Very important
Offers an upscale travel experience					
Has lots of activities for families					
Has lots of places for outdoor recreation such as hiking, biking and canoeing					
Has lots of upscale shopping					
Has lots of antique shopping					
Has lots of quaint, interesting small communities					
Has lots of auto/racing attractions					
Has lots of golf courses					
Has lots of historical sites and attractions					
Is easy to get to					
Is a comfortable place to visit					
Has farm markets or wineries					
Is an affordable place to visit					
Has lots of nightlife					
Has many fine restaurants					
Has a wide variety of places to stay					
Has a variety of luxury places to stay					
Is a fun place to visit					

2. How familiar are you with Hendricks County, Indiana?

Would you say.....

- 1...Very familiar (SKIP TO 2B)
- 2...Somewhat familiar (SKIP TO 2B)
- 3...Not at all familiar

2a. Hendricks County Indiana includes the towns of Avon, Brownsburg, Danville and Plainfield. Thinking about those areas would you say you are...

- 1...Very familiar
- 2...Somewhat familiar
- 3...Not at all familiar (SKIP TO Q4)

2b. What comes to mind when you think of the Hendricks County area?

2c Based on what you know or have heard, please consider the following descriptions of a destination and how well they describe the Hendricks County area.

	Does Not Describe Hendricks County At All	2	3	4	Describes Hendricks Well
Offers an upscale travel experience					
Has lots of activities for families					
Has lots of places for outdoor recreation such as hiking, biking and canoeing					
Has lots of upscale shopping					
Has lots of antique shopping					
Has lots of quaint, interesting small communities					
Has lots of auto/racing attractions					
Has lots of golf courses					
Has lots of historical sites and attractions					
Is easy to get to					
Is a comfortable place to visit					
Has farm markets or wineries					
Is an affordable place to visit					
Has lots of nightlife					
Has many fine restaurants					
Has a wide variety of places to stay					
Has a variety of luxury places to stay					
Is a fun place to visit					

3. Which of the following areas have you visited *for a leisure trip*?

	Within the past two years	Two to Five years ago	More than 5 years ago	Never visited
Hendricks County, Indiana				
Indianapolis, IN				
Cincinnati, OH				
Charlotte, NC				
Chicago, IL				
Hamilton County, Indiana				
Columbus, OH				
Louisville, KY				
St. Louis, MO				

4. Which of the following attractions have you ever visited? Please check all that apply.

- 1.....O'Reilly Raceway Park at Indianapolis (formerly Indianapolis Raceway Park)
- 2.....Chateau Thomas Winery
- 3.....Plainfield Splash Island Complex
- 4.....Golfed in Hendricks County, Indiana
- 5.....Indianapolis Zoo
- 6.....Indianapolis Motor Speedway
- 8.....Covered Bridges of Parke and Putnam County, Indiana
- 9.....Golfed in Hamilton County, Indiana
- 10.....Indianapolis Children's Museum
- 11.....Visited an Orchard or Farmer's Market in Indiana
- 12.....Metropolis Shopping Center
- 13.....Circle Center Mall
- 14.....None

5. Consider the following activities that could be available on a short leisure trip. How interested would you be in participating in these activities if you were visiting Hendricks County for a leisure trip?

	Not at all Interested	2	3	4	Very Interested
Tour facilities that make or work on nationally-known race cars					
Ability to play golf at a variety of courses					
Visit a national museum featuring all major forms of auto racing with hands on exhibits, memorabilia and souvenirs					
Visit a working farm and have experiences like delicious organic dinners served in a farm setting, hay rides and other relaxing activities					
An upscale mall with nationally known stores					
An arts district with lots of art galleries and unusual shops					
A quaint downtown with antiques, unique stores and great local dining					
Canoeing or kayaking on the river					
An outdoor water park					
A stroll through a large botanic garden, complete with a children's play garden					
A package of family activities including biking, bowling and a water park along with an upscale movie experience					
A theater, live music or concert performance					
A trail that traced a number of historical sites and provided interactive experiences along the way					
Visit a locally owned winery for entertainment and education on wine					
A trail that includes 5-7 wineries that offer varied experiences including tours, tastings, vineyard education and entertainment					
A trail for bicycling along historical and scenic routes in the area					
Attend a restaurant showcase featuring locally owned dining experiences					
Attend a nationally sanctioned motor sports event (NHRA, NASCAR, IRL, USAC)					
A trail through a variety of working farms such as an apple orchard, orchid farm and maple sugar farm.					
Visit a working dairy farm with hands on activities and educational experiences					

BRING UP ALL THE ACTIVITIES THAT ARE RATED A 4 OR 5 AND ASK:
 6. Which of these, if any, would motivate you to choose Hendricks County as the location a leisure trip? You may choose up to three. [IF NONE – SKIP Q8]

7. Now rank your choices in terms of those you are most likely to do using a 1 for most likely, 2 for next most and so on...

- 7a. Have you ever taken a trip where the main purpose is racing?
 1. Yes
 2. No [IF NO SKIP TO INSTRUCTION AFTER Q14]

8. How many leisure trips did take last year, where the main purpose was auto racing?

9. Have you ever been to any of the following? Check all that apply
 1. National Trail Raceway (Columbus, OH)
 2. Gateway International Speedway (St. Louis, MO)
 3. Bristol Motor Speedway (Bristol, TN)
 4. Chicagoland Speedway (Chicago, IL)
 5. Kentucky Speedway (Sparta, KY)
 6. None of these tracks

10. Who do you typically travel with when you go on racing leisure trips?
 1.....Spouse
 2.....Spouse and children
 3.....Other family members
 4.....Friends of the same gender
 5.....Other couples/friends of mixed gender

11. How important is it that the following are part of your racing trip?

	Not at all Important	2	3	4	Very Important
Affordable accommodations					
Variety of nearby restaurants					
Event affordability, including tickets, parking and concessions					
Shopping					
Nightlife/bars					
Activities for other family members					

12. Which of the following would influence your decision to take a racing trip to Hendricks County?

	No influence	2	3	4	Strongly influence
Ability to see a NASCAR race					
Ability to see an IndyCar race					
Ability to see a NHRA race					
Visit nationally known race team headquarters					
Ability to visit multiple companies that make parts for or service race cars					
Being closer than other comparable options					
Ability to visit a museum featuring all major forms of auto racing					
Being more affordable than comparable options					

13. Is there anything that would make you hesitate to visit Hendricks County for a racing trip? _____

Many communities brand themselves as a travel destination. As part of this process they develop logos and taglines that are designed to communicate key messages and images of the community. Next you will be asked to look at some logos and taglines and provide feedback.

SHOW FIRST LOGO

15. How much does this logo and tagline communicate each of the following messages about Hendricks County?

	Strongly disagree - 1	2	3	4	Strongly agree - 5
Is engaging					
Is action-packed					
Is unique					
Is welcoming					
Is fun					
Is lively					
Is memorable					

15. How much does this logo make you...

	Strongly disagree - 1	2	3	4	Strongly agree - 5
Want to learn more about things to do and see					
Want to go to the website					
Want to visit Hendricks County					

REPEAT FOR ADDITIONAL LOGOS/SLOGANS

These last few questions are for classification purposes only.

16. Are you...?

- 1...Married
- 2...Single
- 3...Separated/Divorced
- 4...Widowed

17. Including yourself, how many people are currently living in your household?

- a. How many are children under the age of 14? _____
- b. How many are children 14-18 years old? _____

18. Which of the following categories represents the last grade of school you completed?

- 1.....Less than high school graduate
- 2.....High school graduate
- 3.....Some college or technical school
- 4.....College graduate
- 5.....Graduate work/advanced degree

19. Which of the following categories best represents the total annual income for your household before taxes?

- 1.....less than \$50,000
- 2.....\$50,000 but less than \$79,999
- 3.....\$80,000 but less than \$99,999
- 4.....\$100,000 but less than \$124,999
- 5.....over \$125,000

20. What is your age? _____

21. What is your zip code? _____

22. Are you
- 1.....Male
 - 2.....Female