



Hendricks County Image/Halo Research

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ABOUT LONGWOODS INTERNATIONAL

Established in 1978 as a market research consultancy, Longwoods International is a premier market research firm that is a respected leader within the travel and tourism industry. With offices in Toronto, Ohio, Indiana, Michigan, Florida, New York, North Carolina, Illinois and Wisconsin, Longwoods **conducts strategic market research** for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods is known for a multitude of destination marketing services, most notably:

➔ **Overnight and day visitor profiles**, including visitor volumes and expenditures, through **Travel USA®**, the largest American domestic travel study, begun in 1990.

➔ **Destination advertising awareness, return-on-investment of advertising campaigns**, and **measuring the impact of advertising on a destination's image** across a wide range of leisure travel attributes.

➔ **"Halo Effect"** of tourism advertising on a destination's image for broader economic development objectives.

➔ **Resident sentiment research**, which investigates both practical and emerging concerns among residents in a destination regarding tourism, including topics such as economic development, perceived environmental impacts, overtourism, and residents' quality of life.

➔ **Custom qualitative and quantitative research**

Soundly grounded in scientific principles, our research methodologies have been **peer-reviewed**, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists. Our **scientific integrity has been recognized** with numerous Best Practice awards, as well as invitations for speaking engagements across North America.

With the acquisition of Clarity of Place, Longwoods now also offers cutting-edge approaches to help destinations **evaluate the alignment of the needs of visitors with those of residents**, the community capacity for destination growth, the health of their brand image, and their ability to remain competitive.

PROJECT OVERVIEW

Longwoods was engaged to conduct a program of research designed to provide Hendricks County with data and insights into travelers' perceptions of Hendricks County. This study specifically profiled:

- Key travel motivators for Hendricks County's target markets
- Image of Hendricks County in the areas that are important to travelers
- Hendricks County's image strengths and weaknesses versus competitors
 - Hamilton County, IN
 - Johnson County, IN
 - SoIN/Southern Indiana (Clark and Floyd Counties, IN)
 - Terre Haute, IN
 - Evansville, IN
- Hendricks County's image versus its product delivery
- Awareness of Hendricks County's tourism advertising
- The "halo effect" of Hendricks County's tourism advertising

Survey fielded in **four key advertising markets** and received **1,000 qualified respondents**.

Qualified respondents are **adult travelers*** and members of major online consumer research panel.

Sample drawn to be **representative and proportionate to sample DMAs, age, and gender**.

Data were weighted on **key demographic variables** (geography, age, sex, household income, household size) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific markets.

Fieldwork was conducted in April 25 – May 8, 2024. Median length of survey was 15 minutes. For a sample of this size, **the confidence level is + / -3, 19 times out of 20**

Sample Markets + Respondent Distribution	
Indianapolis DMA**	400
Fort Wayne DMA	110
Cincinnati DMA	350
Champaign-Springfield-Decatur DMA	140

*Adults 18 years of age or older who have taken at least one day or overnight leisure trip in the past 3 years and intend to take one in the next 2 years.

**Excludes Hendricks County

ADVERTISING

Nearly half of (48%) travelers in Visit Hendricks County's key advertising markets recalled seeing at least one Visit Hendricks County advertisement.

Over half of (54%) in-state travelers and four in ten (42%) out-of-state travelers in Visit Hendricks County's key advertising markets recalled seeing at least one ad.

Four in ten (42%) recalled at least one social media ad, one-third (34%) recalled one digital ad, and more than one in ten (16%) recalled one out-of-home ad.

The ads with the highest level of recall in the key advertising markets were:

Audio Streaming 1 – 21%

YouTube Video – 20%

NHRA TikTok – 20%

Overnight OOH Compilation – 19%

Audio Streaming 2 – 18%

Summer TikTok – 17%

Fall TikTok 2 – 16%

IMAGE

For a destination to get on the travelers from the target markets' consideration list, it must, first and foremost, be perceived to be exciting – being seen as exciting, fun, and having a real sense of fun and adventure.

When travelers from Visit Hendricks County's key advertising markets are deciding to visit the county, or one of its regional competitors, the 10 most important individual attributes (called Hot Buttons) tied to destination selection are: a fun place to visit, a good place to travel with friends, visiting this place is a real adventure, an exciting place, lots to see and do, noted for its unique dining experiences, provides unique travel experiences, children would especially enjoy this place, good place for families to visit, and interesting towns.

The advertising measured in this study had a strong, positive impact on travelers' perceptions of Hendricks County. Travelers in these target markets exposed to the campaign gave the county higher rating scores than those unfamiliar with the campaign across all Travel Motivator categories. For the more detailed attributes, we find that the campaign did an exceptional job improving people's perceptions of Hendricks County for nearly every image dimension evaluated, including all 10 Hot Button attributes.

More travelers from the target advertising markets who visited the county in the past two years gave Hendricks County higher rating scores than those who have never visited across all Travel Motivator categories. From this analysis we find that Hendricks County had two weaknesses in product delivery, Excellent fishing and Great for canoeing and kayaking. Neither of which are Hot Buttons. More recent Hendricks County visitors than non-visitors rated Hendricks County more favorably across eight Hot Button attributes.

IMAGE

Relative to the other destinations in the competitive set for this study, Hendricks County is competitive against most of the destinations included in this analysis. Across the target markets surveyed, three in ten rated Hendricks County very favorably as a destination they “would really enjoy visiting.” Hendricks County is tied with Terre Haute and Johnson County, and behind Hamilton County, SoIN/Southern Indiana, and Evansville. The county is only 11 points behind the top competitor, which is a reasonable reputational gap to close with time and effort.

Hendricks County is on par with its competitive set on most Image attributes and falls slightly below the competition when it comes to being a fun place to visit, great for canoeing and kayaking, exciting entertainment and shows, and being a well-known destination.

However, travelers rated Hendricks County higher than the competitive set when it comes to children would especially enjoy this place, a place with a “small town feel” and noted for motorsport experiences.

When looking at the most important motivators when it comes to destination selection for those travelers living in Hendricks County’s regional advertising markets, in-state and out-of-state scores are similar.

Three-fourths (75%) of travelers from Hendricks County’s regional advertising markets state that restaurants are very or extremely important when considering destinations for a leisure trip. Six in ten (60%) list outdoor amenities, and half (51%) state events and festivals are very or extremely important amenities/activities.

HALO EFFECT

In every case, Hendricks County's tourism advertising significantly improved the image of the county for a wide range of economic development objectives. Those who saw the advertising rated Hendricks County higher on all the economic development indicators.

Travelers who visited Hendricks County during the past two years also consistently rated the county higher than those who have never visited.

For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited Hendricks County.

In every case, Hendricks County's tourism advertising and subsequent visitation significantly improved the image of the county for a wide range of economic development objectives, including a good place to live, start a career, retire, and start a business.



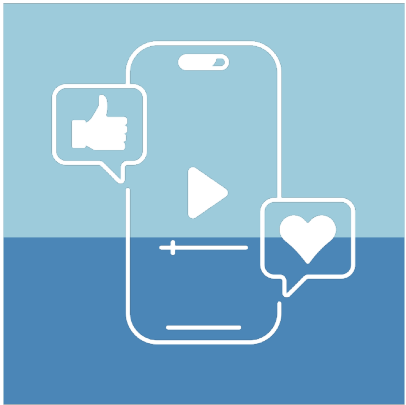
[ADVERTISING AWARENESS]



AWARENESS* OF THE AD CAMPAIGN

48% Aware of Any Ad

SOCIAL MEDIA AWARE



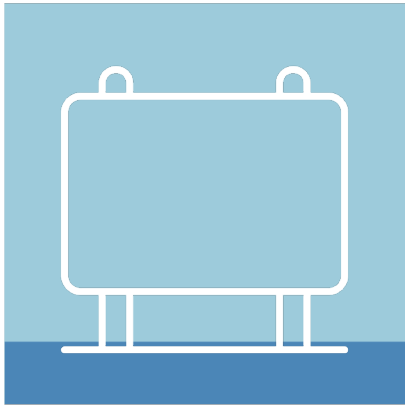
42%

DIGITAL AWARE



34%

OUT-OF-HOME AWARE

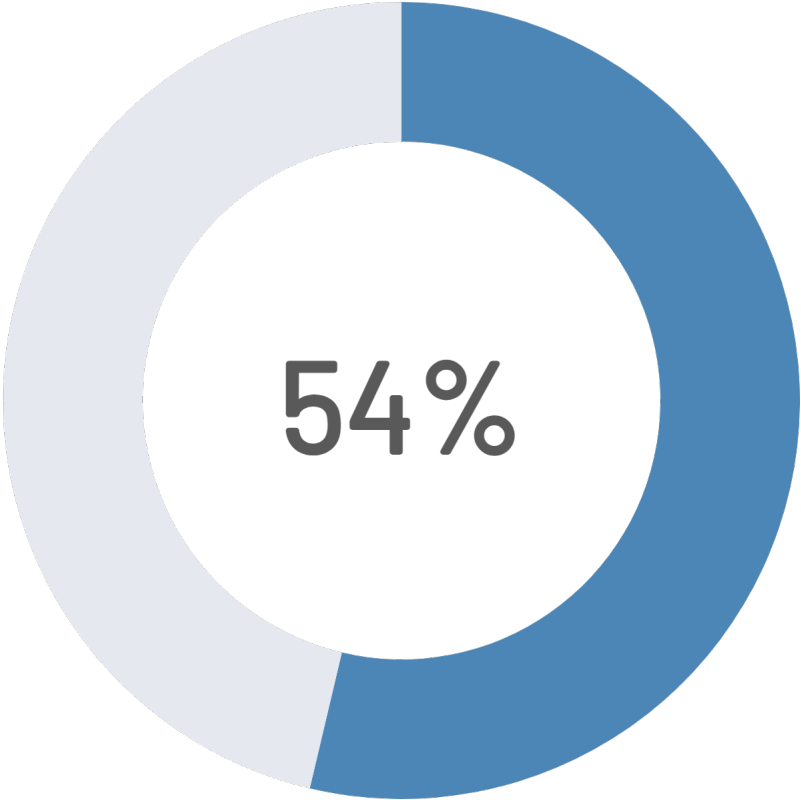


16%

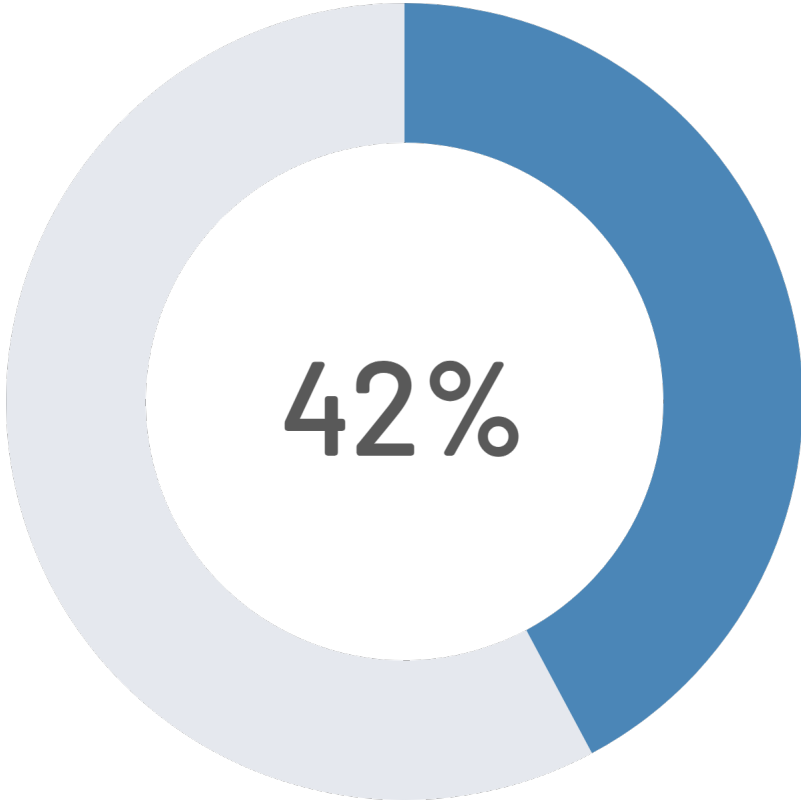
*Saw at least one ad and based on markets where shown
Base: Residents of Hendricks County's Regional Advertising Markets

AWARENESS* COMPARISONS

IN-STATE



OUT-OF-STATE



*Saw at least one ad and based on markets where shown
Base: Residents of Hendricks County's Regional Advertising Markets

SOCIAL MEDIA AND DIGITAL ADVERTISING CREATIVE



General Learn More Compilation



Take The Quiz Compilation

SOCIAL MEDIA AND DIGITAL ADVERTISING CREATIVE (Cont'd)



Fall Quiz Compilation



General Fall Compilation

SOCIAL MEDIA AND DIGITAL ADVERTISING CREATIVE (Cont'd)



NHRA is Back Compilation



NHRA US Nationals Orange Compilation

SOCIAL MEDIA AND DIGITAL ADVERTISING CREATIVE (Cont'd)

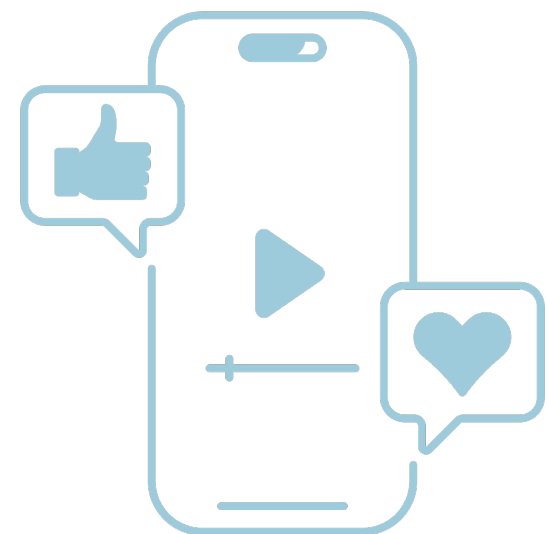


NHRA US Nationals Blue Compilation

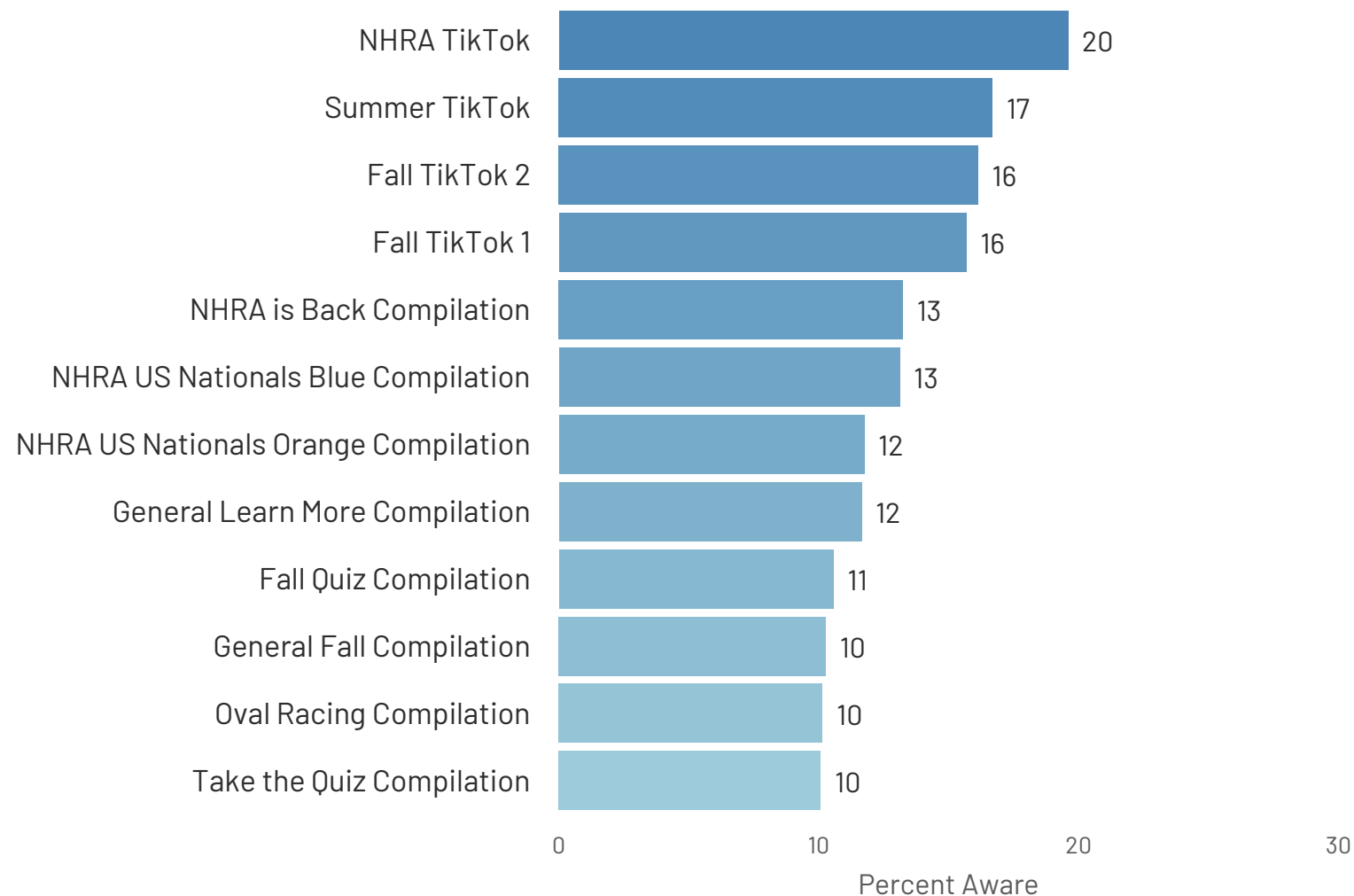


Oval Racing Compilation

AWARENESS* OF SOCIAL MEDIA ADS

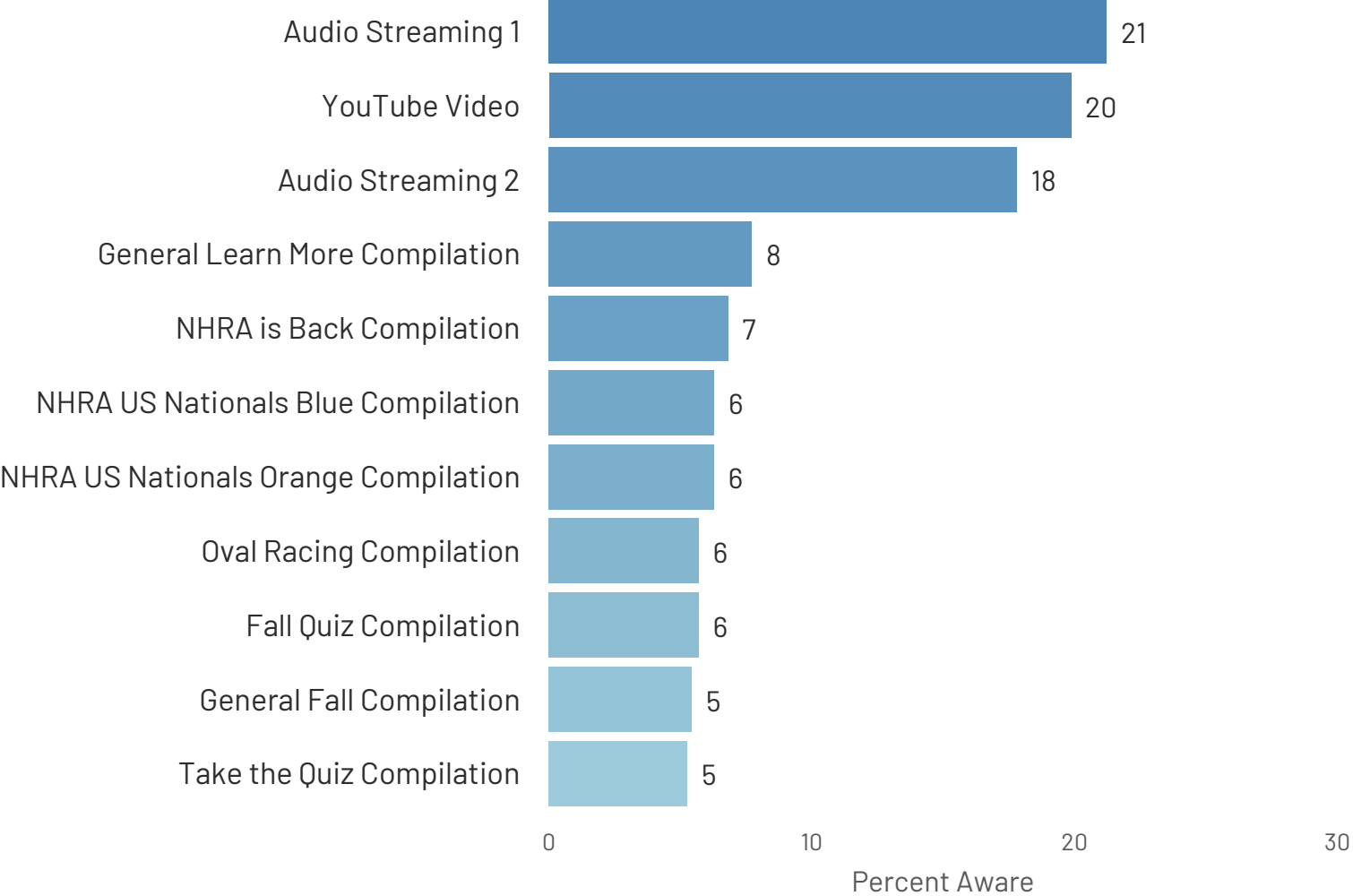


**Social Media Ad
Awareness**
42%



*Saw at least one ad and based on markets where shown
Base: Residents of Hendricks County's Regional Advertising Markets

AWARENESS* OF DIGITAL ADS



*Saw at least one ad and based on markets where shown
Base: Residents of Hendricks County's Regional Advertising Markets

OUT-OF-HOME ADVERTISING CREATIVE

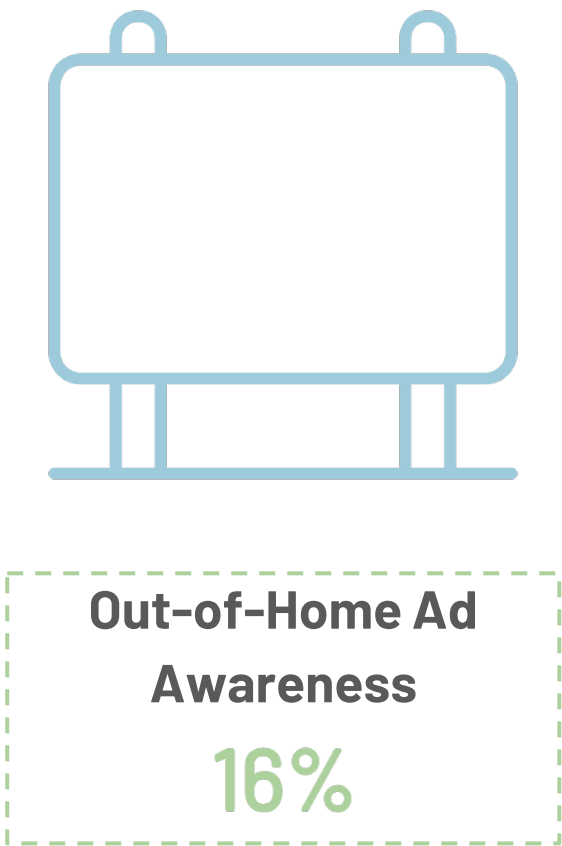


Overnight OOH Compilation



Local OOH Compilation

AWARENESS* OF OUT-OF-HOME ADS



Overnight OOH Compilation



19

Local OOH Compilation



10

0 10 20 30

Percent Aware

*Saw at least one ad and based on markets where shown
Base: Residents of Hendricks County's Regional Advertising Markets



DESTINATION VISITATION & INTEREST



PAST VISITATION



26% of travelers within Hendricks County's primary markets have visited the county during their lifetime. Among those, 62% have visited during the past 2 years.

	Ever Visited	Visited in Past 2 Years*
Hamilton County	34%	73%
Johnson County	21%	70%
Hendricks County	26%	62%
SoIN/Southern Indiana	27%	55%
Terre Haute	37%	49%
Evansville	36%	48%

*Among those who have ever visited respective destination
Base: Residents of Hendricks County's Regional Advertising Markets

INTENT TO VISIT IN NEXT 12 MONTHS



27% of respondents intend to visit Hendricks County during the next 12 months.

	Probably or Definitely Will Visit Destination in Next 12 Months*
Hamilton County	39%
Terre Haute	29%
Evansville	27%
Hendricks County	27%
SoIN/Southern Indiana	27%
Johnson County	25%

*On a day or overnight trip
Base: Residents of Hendricks County's Regional Advertising Markets



[IMAGE OVERVIEW]



WHAT IS A TRAVEL MOTIVATOR?



Respondents evaluated the image of Hendricks County and five other destinations on an overall basis and on a series of detailed image attributes.

Similar image attributes are grouped together to form **Travel Motivators**.

Travel motivators are ranked in descending order based on the average correlation* value for their respective individual attributes.

Travel Motivators in this Study

Exciting

Adult Vacation

Family Atmosphere

Popular

Sightseeing and Entertainment

Worry Free and Welcoming

Unique

Outdoor Recreation

Affordable

Exciting

A fun place to visit

Visiting this place is a real adventure

An exciting place

Adult Vacation

Good place to travel with friends

Good for couples

Family Atmosphere

Children would especially enjoy this place

Good place for families to visit

Popular

Popular with leisure travelers

Well-known destination

Sightseeing and Entertainment

Lots to see and do

Interesting towns

Exciting entertainment and shows

Great for theater and performing arts

Interesting public art and murals

Excellent museums and historical sites

Excellent shopping

Interesting festivals, fairs, and events

Excellent bars and nightlife

Noted for motorsport experiences

Worry Free and Welcoming

Good place to relax

A place I would feel welcome

Provides opportunities to escape and unwind

Accepting of different cultures, genders, and lifestyles

Unique

Noted for its unique dining experiences

Provides unique travel experiences

Offers unique retro/nostalgic experiences

Good place to visit with dogs

A place with a "small town feel"

Outdoor Recreation

Beautiful gardens and parks

Great water parks

Great for hiking and biking

Good place for exploring nature

Great for canoeing and kayaking

Good place for agritourism experiences

Excellent fishing

Great for horseback riding

Affordable

Excellent value for the money

Not too far away to consider for a leisure trip

Affordable to visit

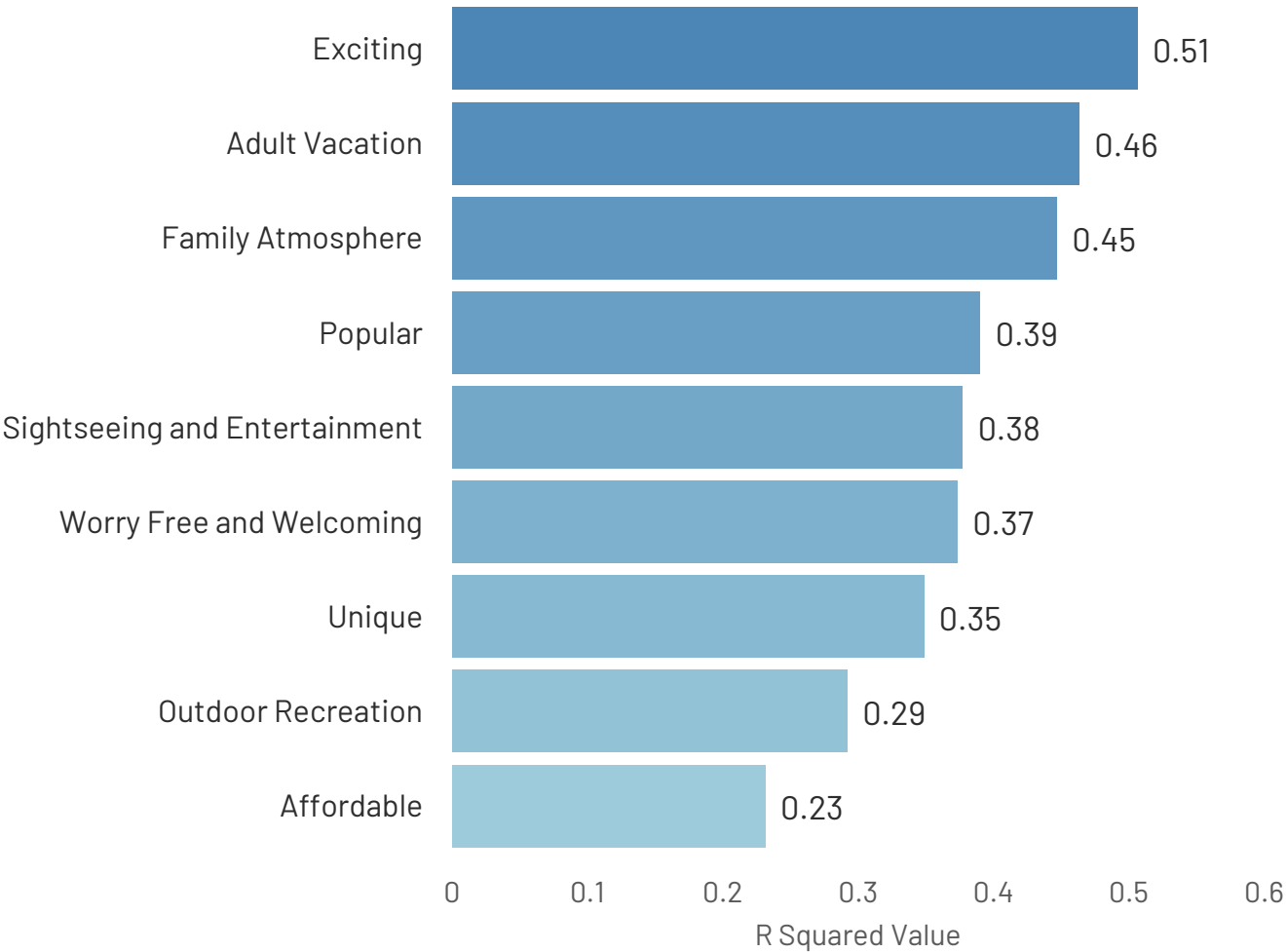
TRAVEL MOTIVATORS

Hendricks County's Travel Motivators

For a destination in Hendricks County's target markets to get on travelers' consideration list, it must, first and foremost, be perceived to be **exciting, great for an adult vacation, and have a family atmosphere.**

Other factors of moderate importance include being **popular, have sightseeing and entertainment, and be worry free and welcoming.**

Lower priorities are **being unique, outdoor recreation offerings, and affordability.**



*Correlations are a measure of the degree of association between each factor and whether destination is a place "I'd really enjoy visiting."
Base: Residents of Hendricks County's Regional Advertising Markets



Hot Buttons are the ten individual image attributes most closely tied to destination selection in Hendricks County's primary markets.*

Hot buttons are high on a traveler's 'wish list' when selecting a destination they'd really enjoy visiting.

HOT BUTTONS

A fun place to visit
Good place to travel with friends
Visiting this place is a real adventure
An exciting place
Lots to see and do
Noted for its unique dining experiences
Provides unique travel experiences
Children would especially enjoy this place
Good place for families to visit
Interesting towns

*Based on strongest correlation value to "A place I'd really enjoy visiting"
Base: Residents of Hendricks County's Regional Advertising Markets



[ADVERTISING IMPACT ON IMAGE]



ADVERTISING IMPACT ON OVERALL IMAGE

This campaign had a positive impact on travelers' perceptions of Hendricks County. Travelers aware of the campaign gave the county a significantly higher rating than those unfamiliar with the campaign for the attribute **Hendricks County is "a place I would really enjoy visiting"**.

Percent who strongly agree Hendricks County is **"A place I'd really enjoy visiting."** **

Aware*



37%

Unaware



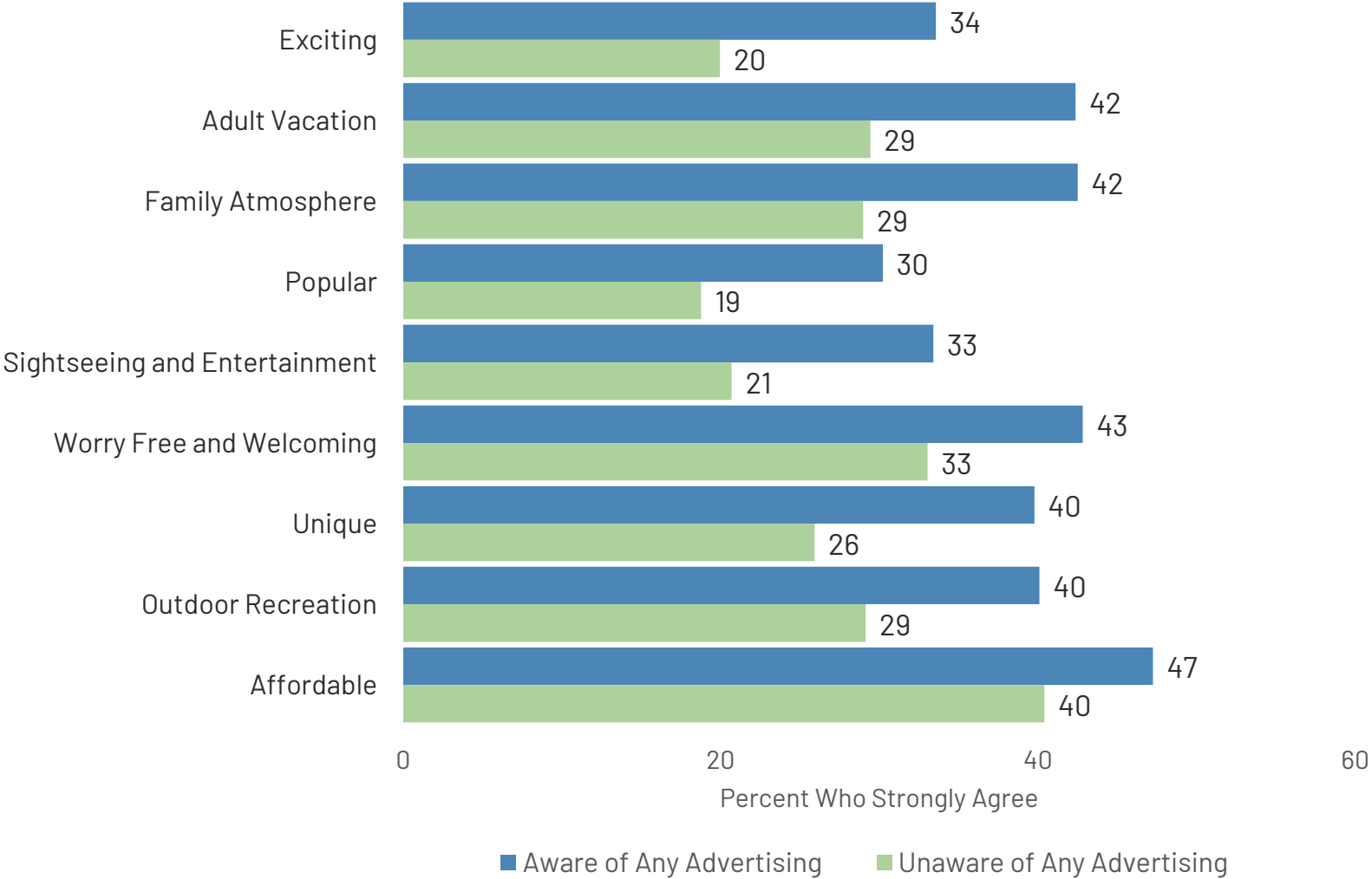
22%

*Saw at least one ad
**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10
Base: Residents of Hendricks County's Regional Advertising Markets

ADVERTISING IMPACT ON IMAGE

This advertising had a strong, positive impact on travelers' perceptions of Hendricks County.

Travelers exposed to the campaign gave the county higher rating scores than those unfamiliar with the ads, across all Travel Motivator categories.



HOT BUTTONS MOST IMPACTED BY ADVERTISING

More travelers who were aware of Hendricks County's advertising than non-aware travelers rated the county favorably across all 10 Hot Buttons.

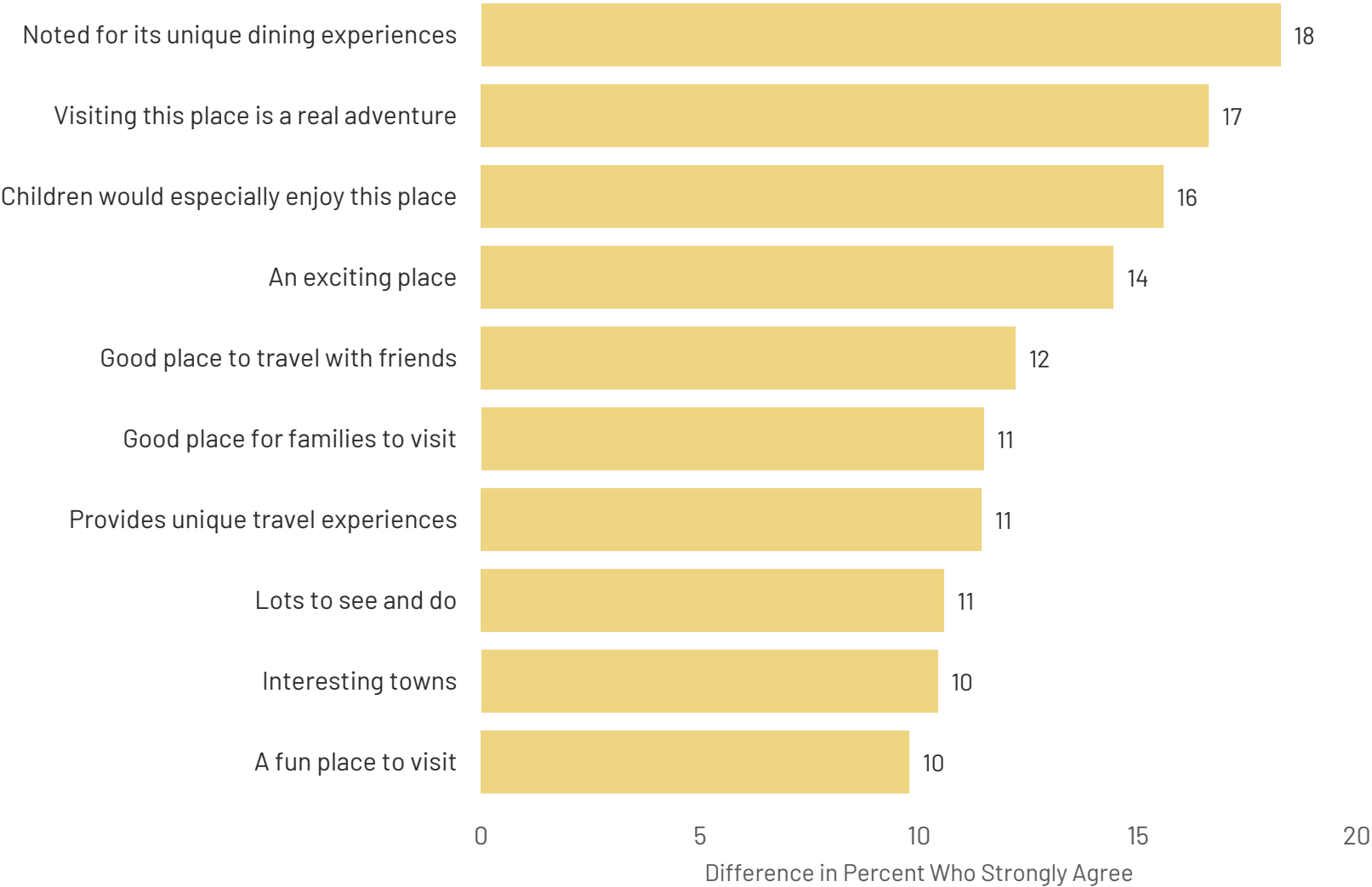
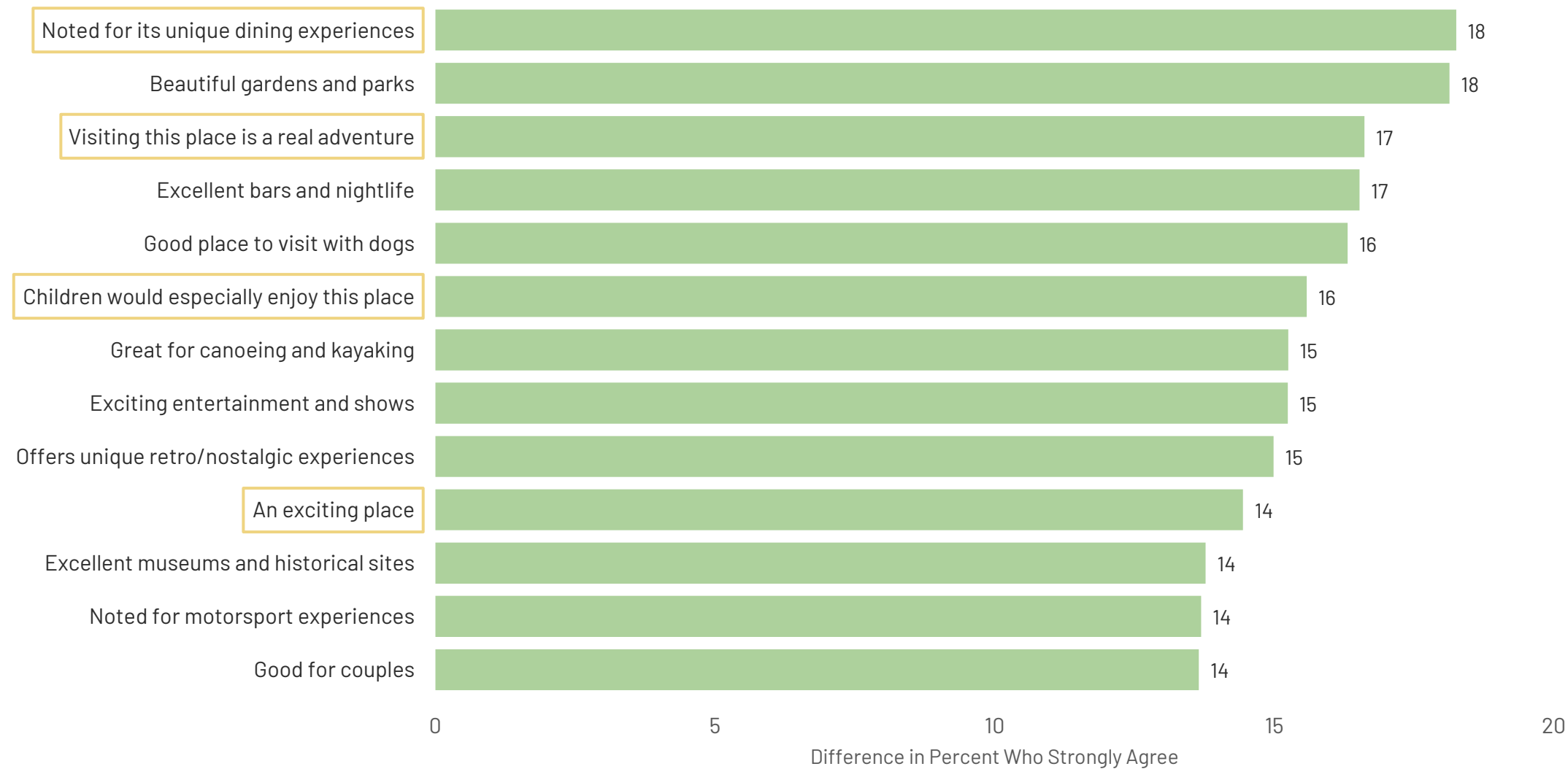


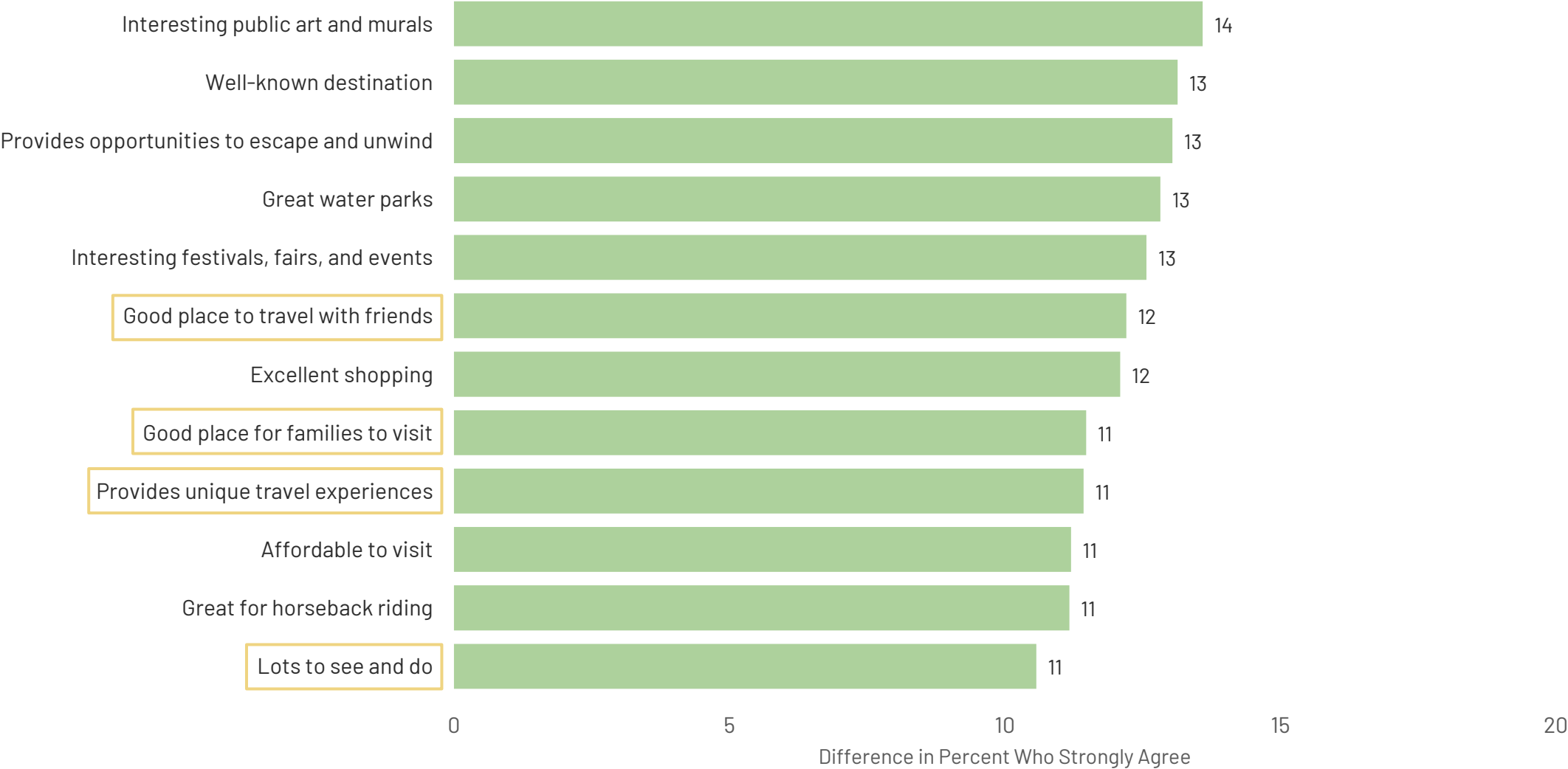
IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING



Hot Button

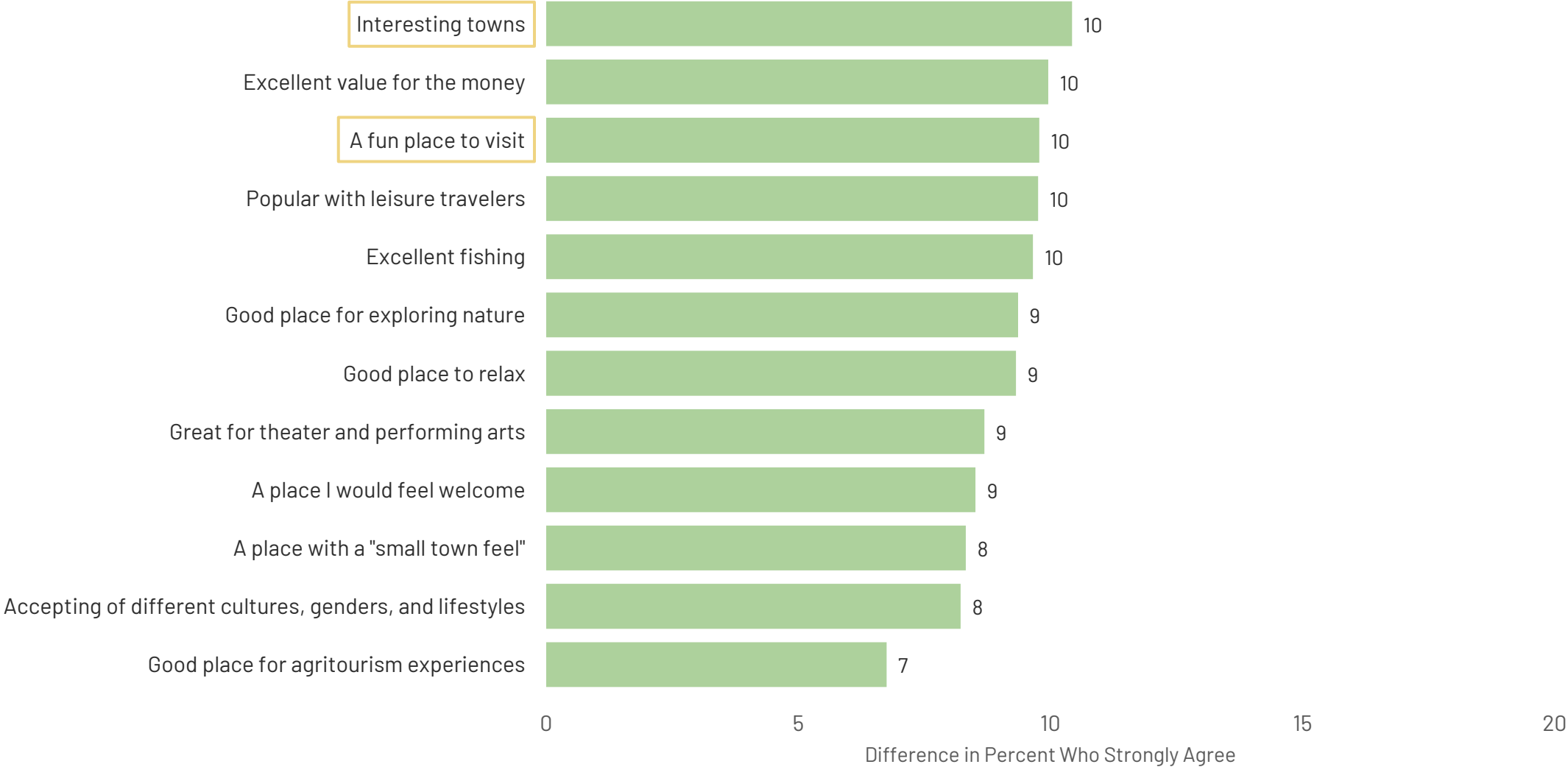
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (Cont'd)



Hot Button

IMAGE ATTRIBUTES MOST IMPACTED BY ADVERTISING (Cont'd)



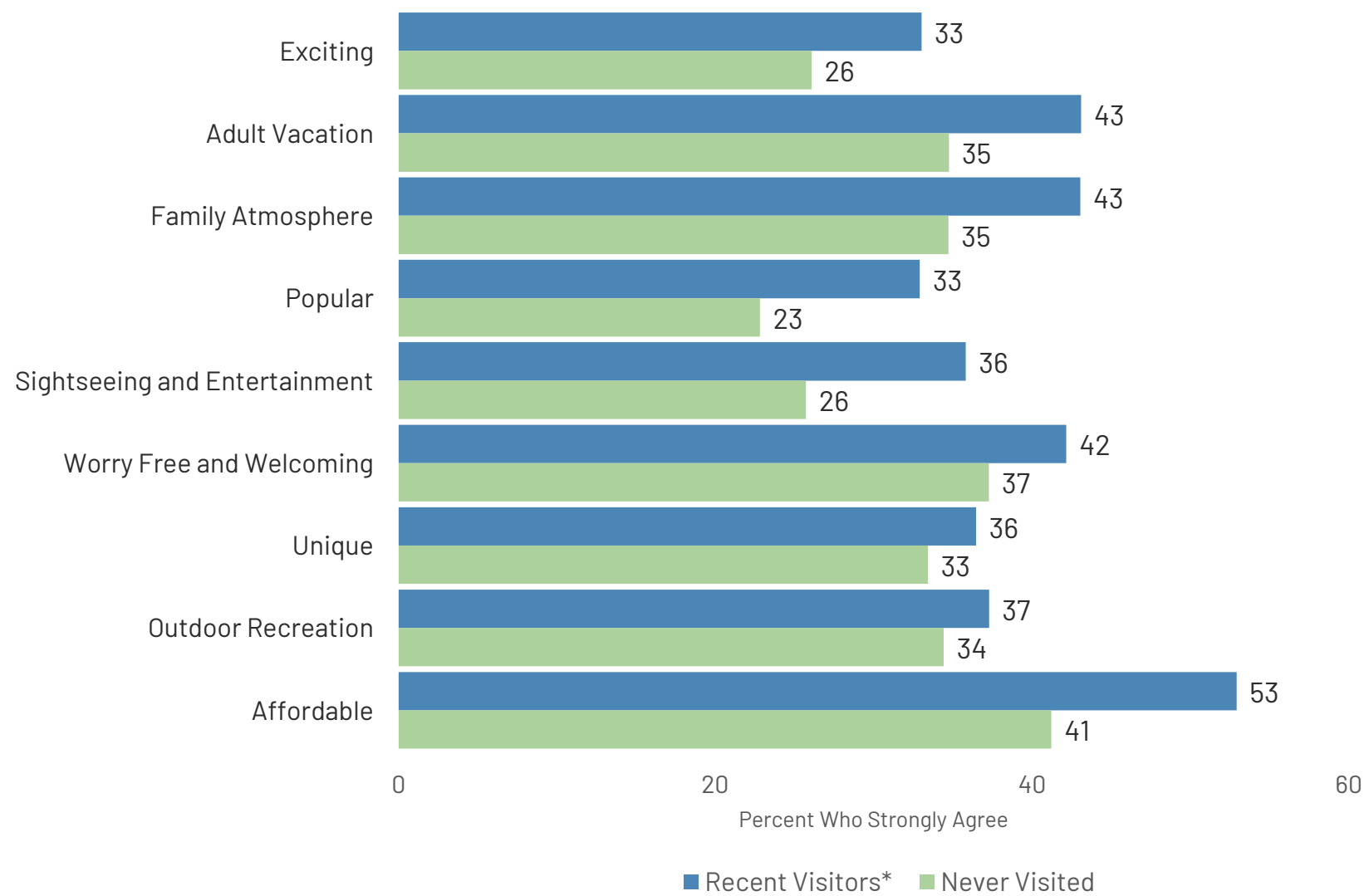
Hot Button



[PRODUCT DELIVERY]



PRODUCT VS. IMAGE

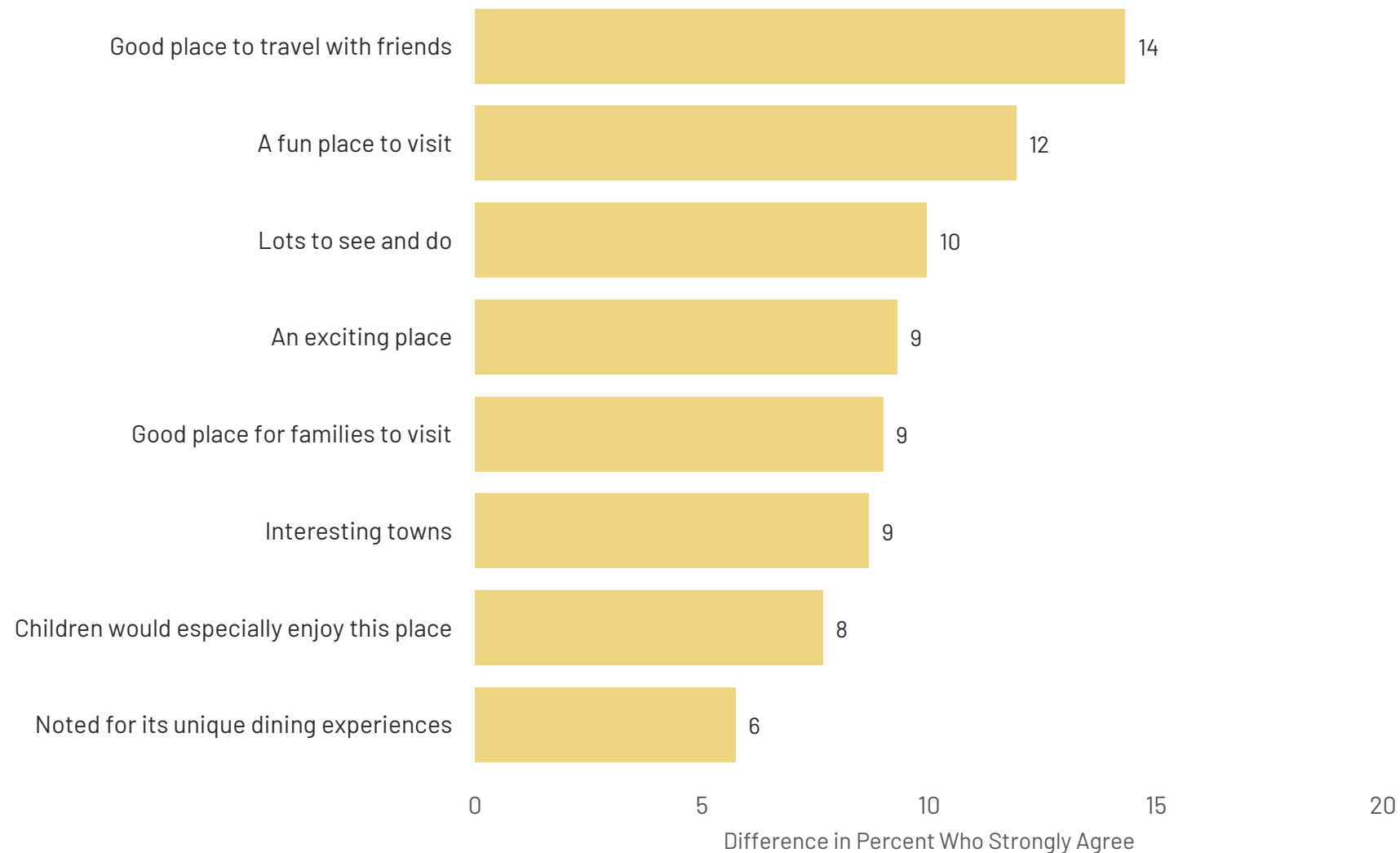


Comparing the image ratings of people who have **never visited** Hendricks County versus that of those who have **visited in the past two years**, we have a measure of **“product delivery,”** the relative satisfaction of the two groups.

*Visited in the past 2 years
Base: Residents of Hendricks County's Regional Advertising Markets

TOP PRODUCT STRENGTHS VS IMAGE - HOT BUTTONS

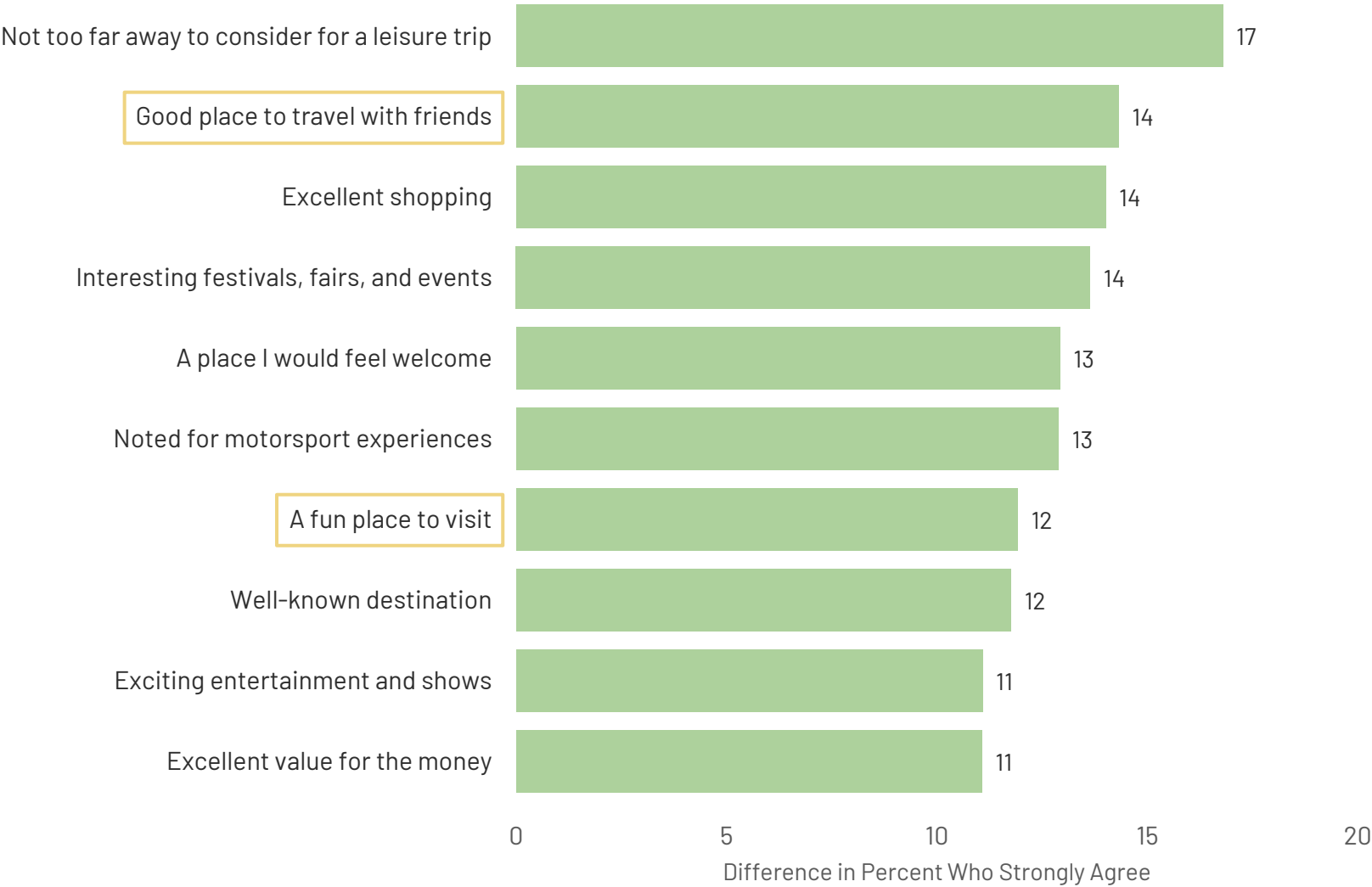
More recent Hendricks County visitors than non-visitors rated the county favorably across eight Hot Buttons.



TOP PRODUCT STRENGTHS VS. IMAGE

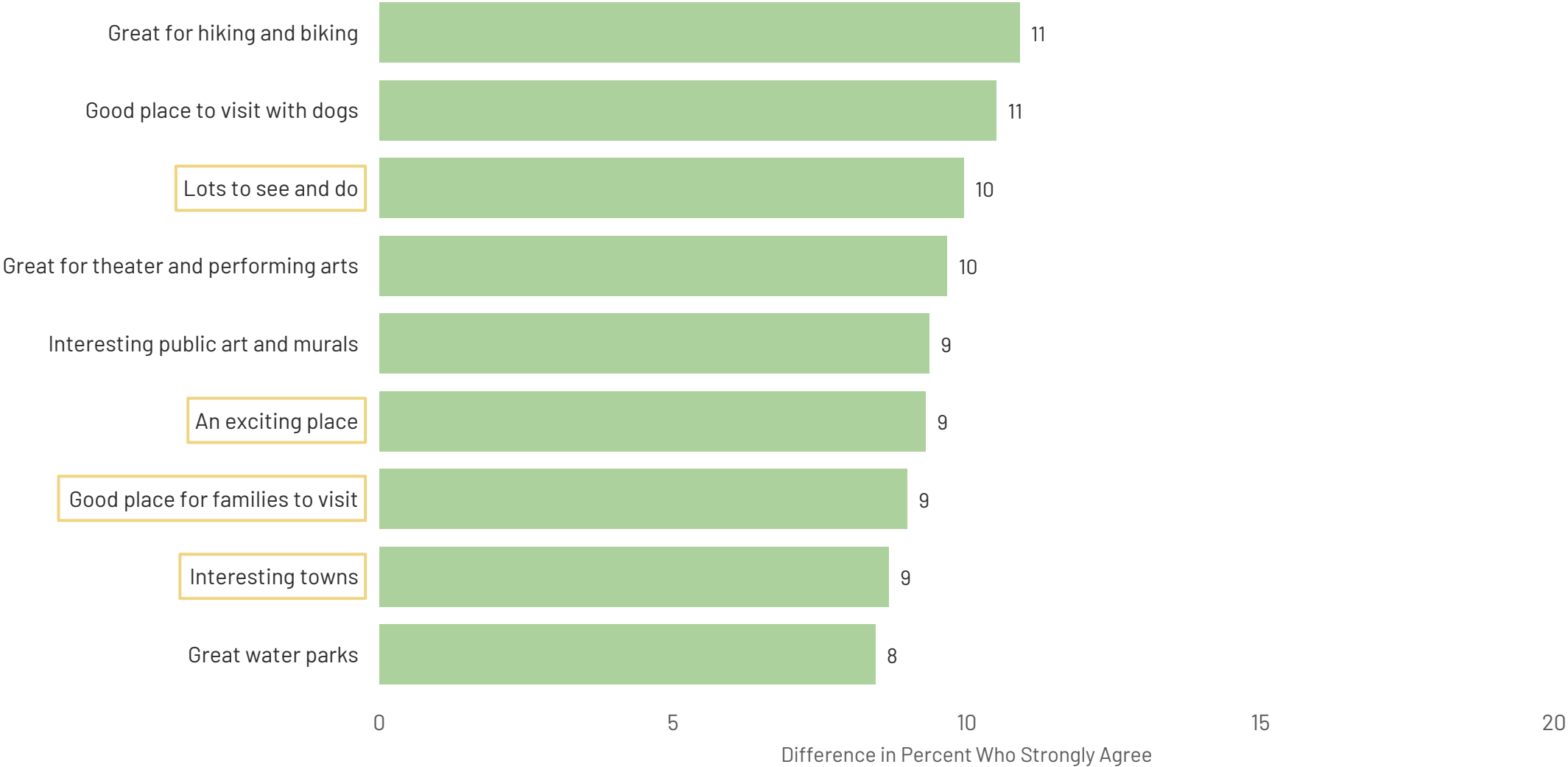


Recent visitation had a significant impact on most image attributes, including Not too far away to consider for a leisure trip.



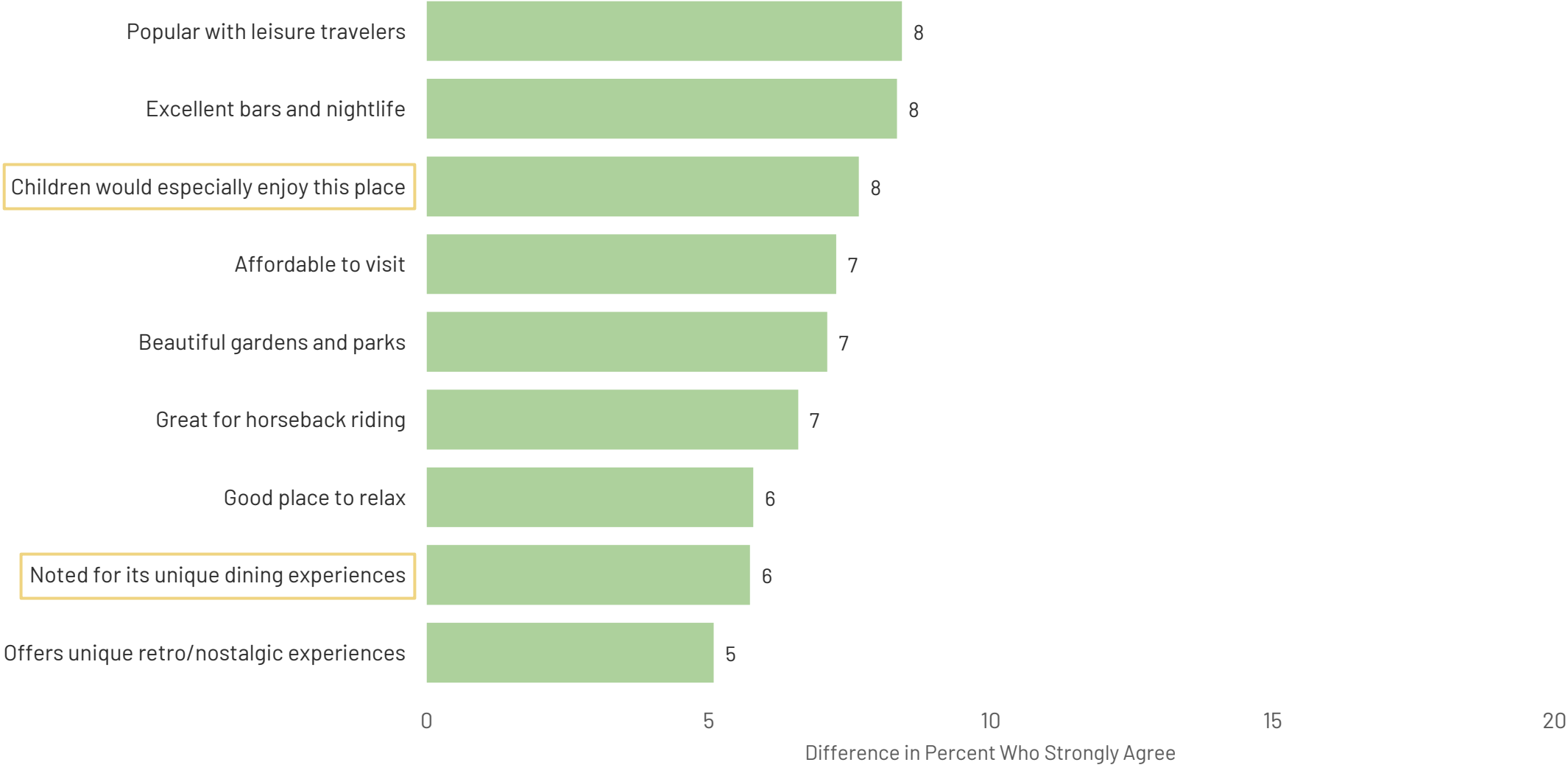
Hot Button

TOP PRODUCT STRENGTHS VS. IMAGE (Cont'd)



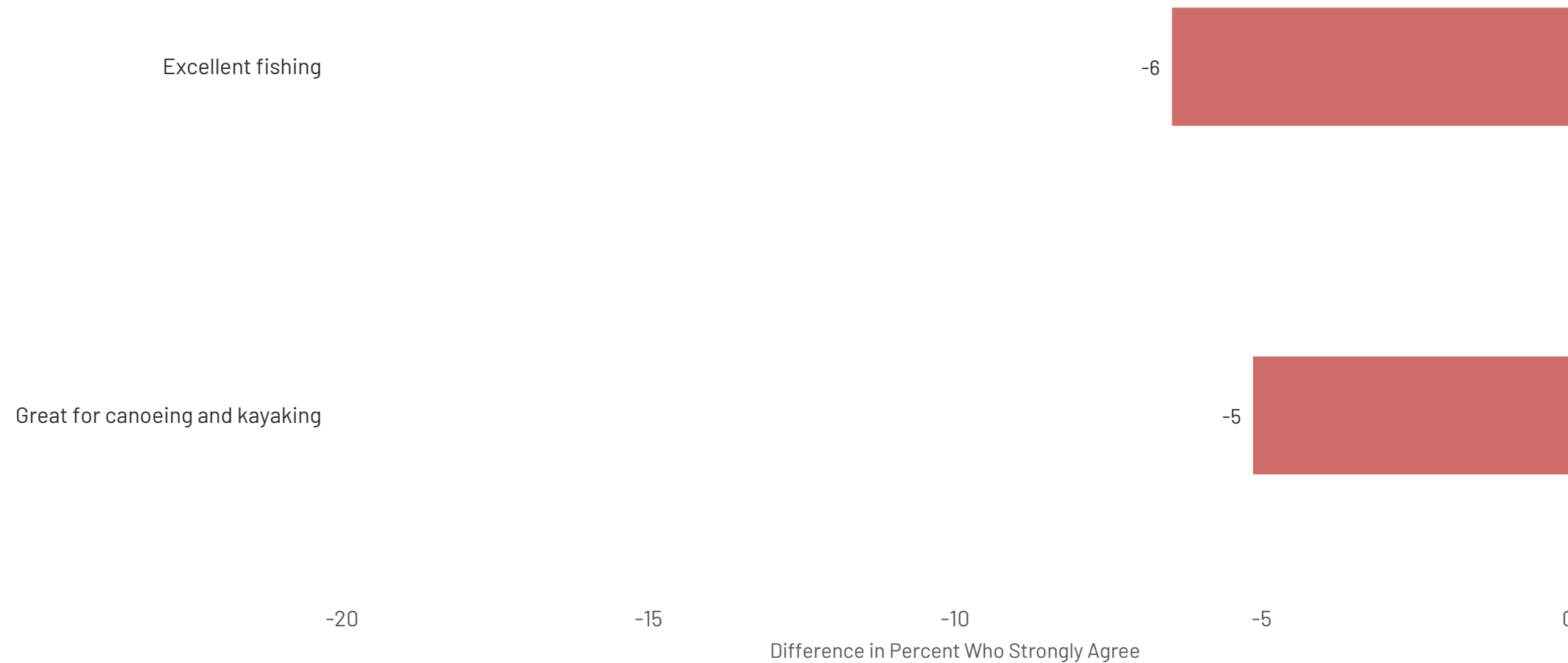
Hot Button

TOP PRODUCT STRENGTHS VS. IMAGE (Cont'd)



Hot Button

TOP PRODUCT WEAKNESSES VS. IMAGE

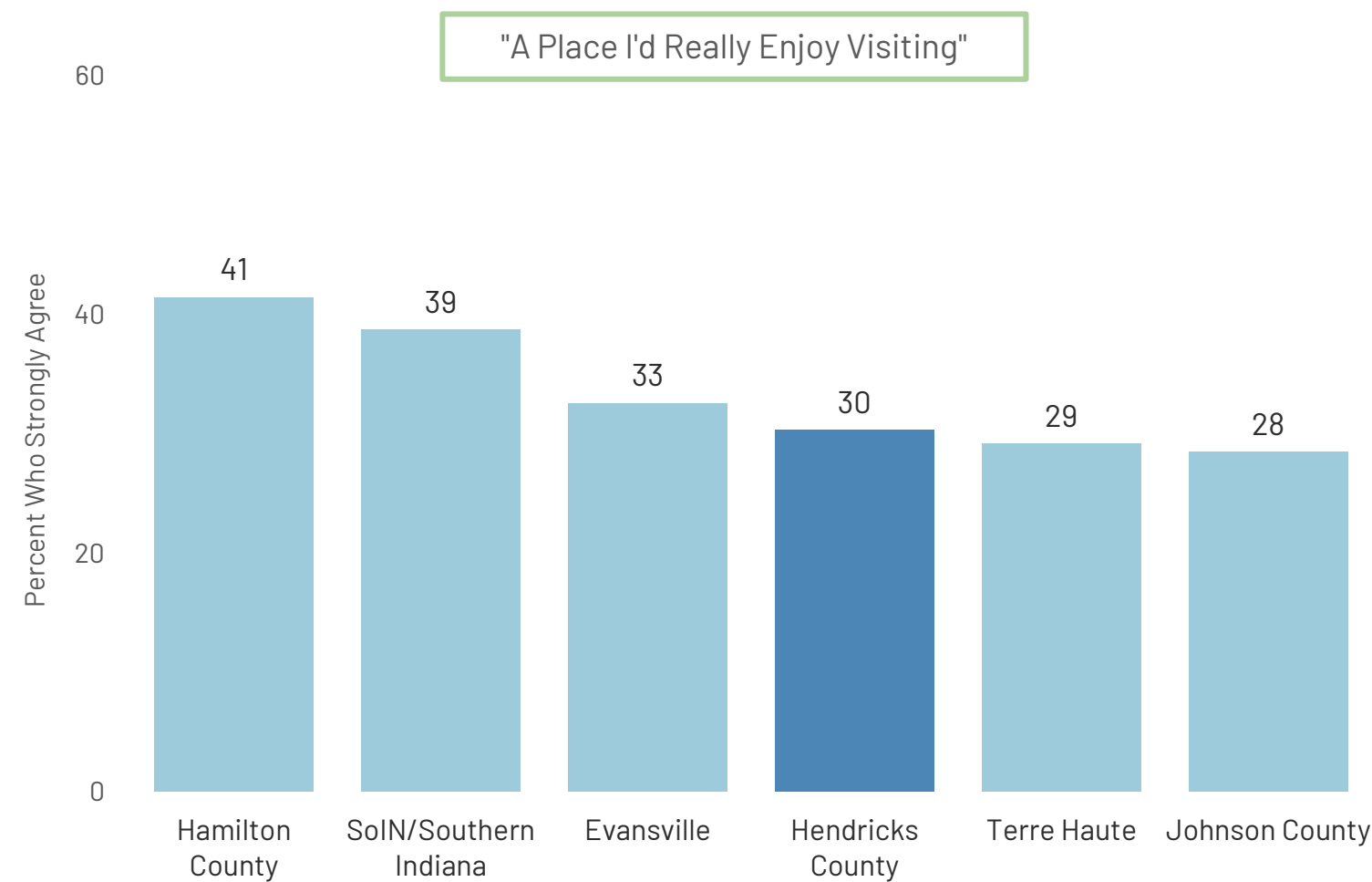




[IMAGE VS. THE COMPETITION]



OVERALL IMAGE VS. COMPETITION

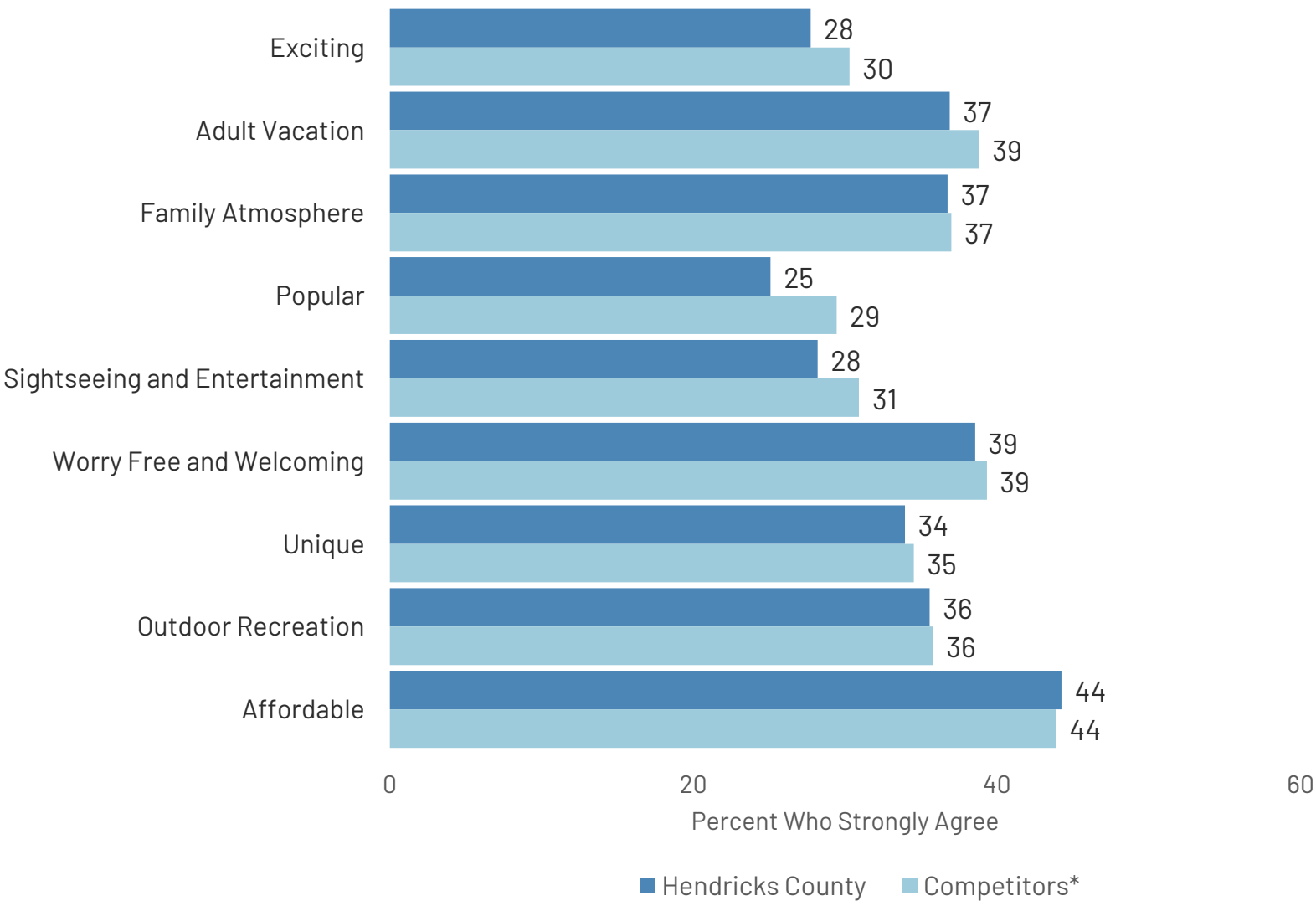


Hendricks County ranks 4th amongst the competitive set when it comes to the perception of the destination being a place I'd really enjoy visiting.

Hendricks County is statistically tied with Terre Haute and Johnson County.

OVERALL IMAGE VS. COMPETITION

When looking at the Travel Motivator categories, it is clear Hendricks County is evenly matched with the combined competitive set, and statistically tied in most categories.



* Includes Hamilton County, Johnson County, SoIN/Southern Indiana, Terre Haute, and Evansville
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - EXCITING



EXCITING

Hendricks County*

28

Competitors*

30

Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

A fun place to visit

31

36

Visiting this place is a real adventure

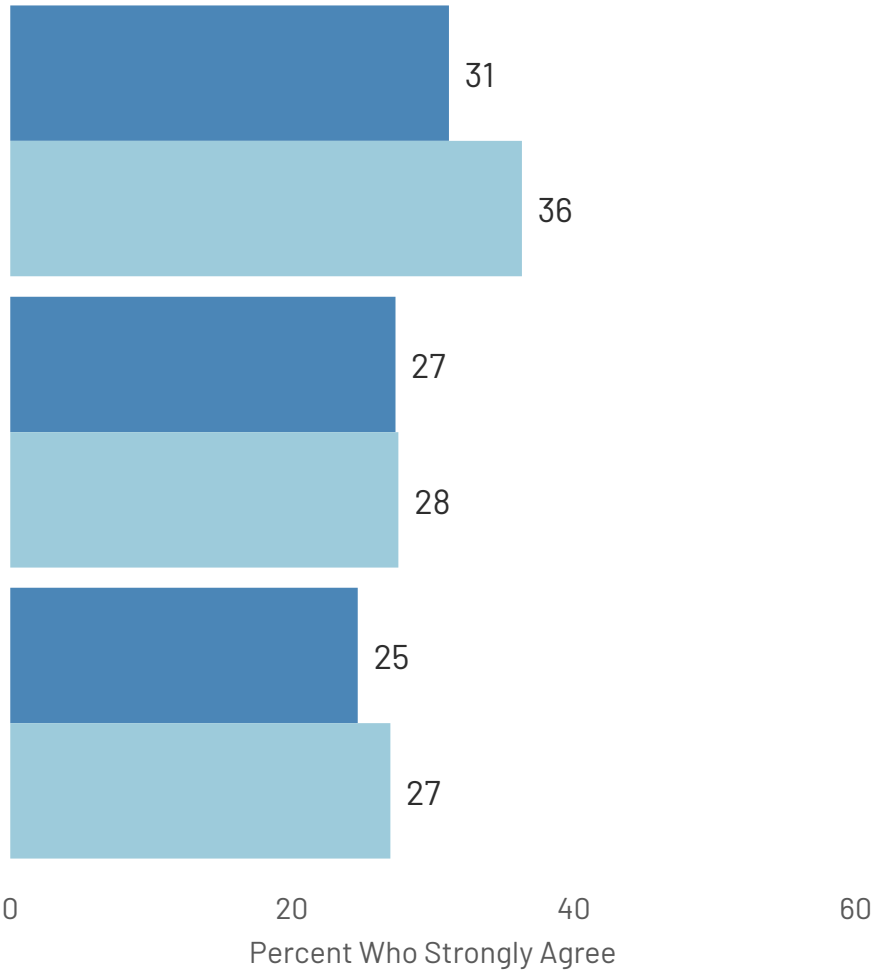
27

28

An exciting place

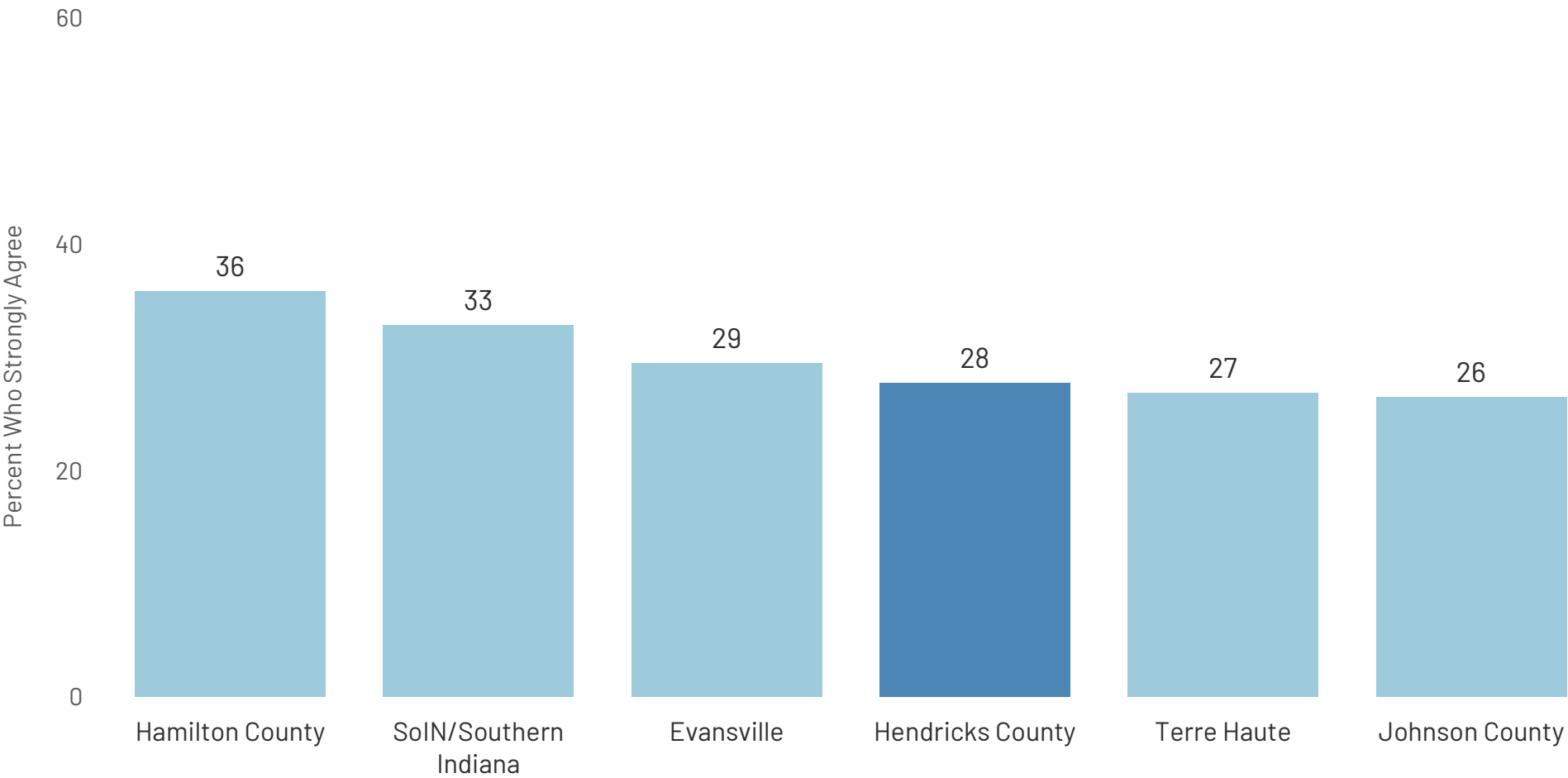
25

27



Hendricks County Competitors

IMAGE VS. COMPETITION - EXCITING



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - ADULT VACATION



ADULT VACATION

Hendricks County*

37

Competitors*

39

Good place to travel with friends

35

39

Good for couples

39

39

0 20 40 60
Percent Who Strongly Agree

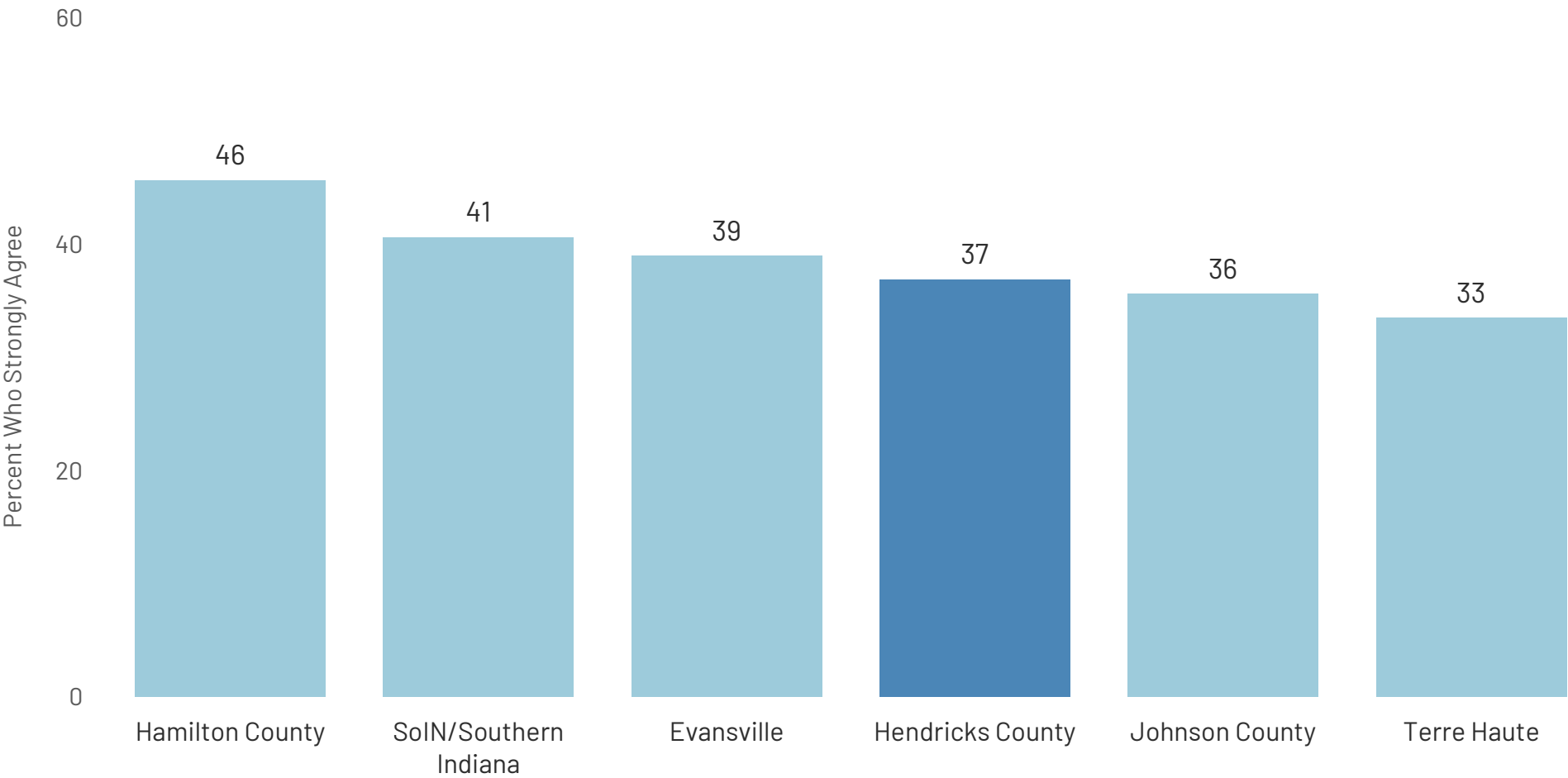
■ Hendricks County ■ Competitors

Hot Button

*Percent who strongly agree

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - ADULT VACATION



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - FAMILY ATMOSPHERE



FAMILY ATMOSPHERE

Hendricks County*

37

Competitors*

37

Children would especially enjoy this place

33

30

Good place for families to visit

41

44

Percent Who Strongly Agree

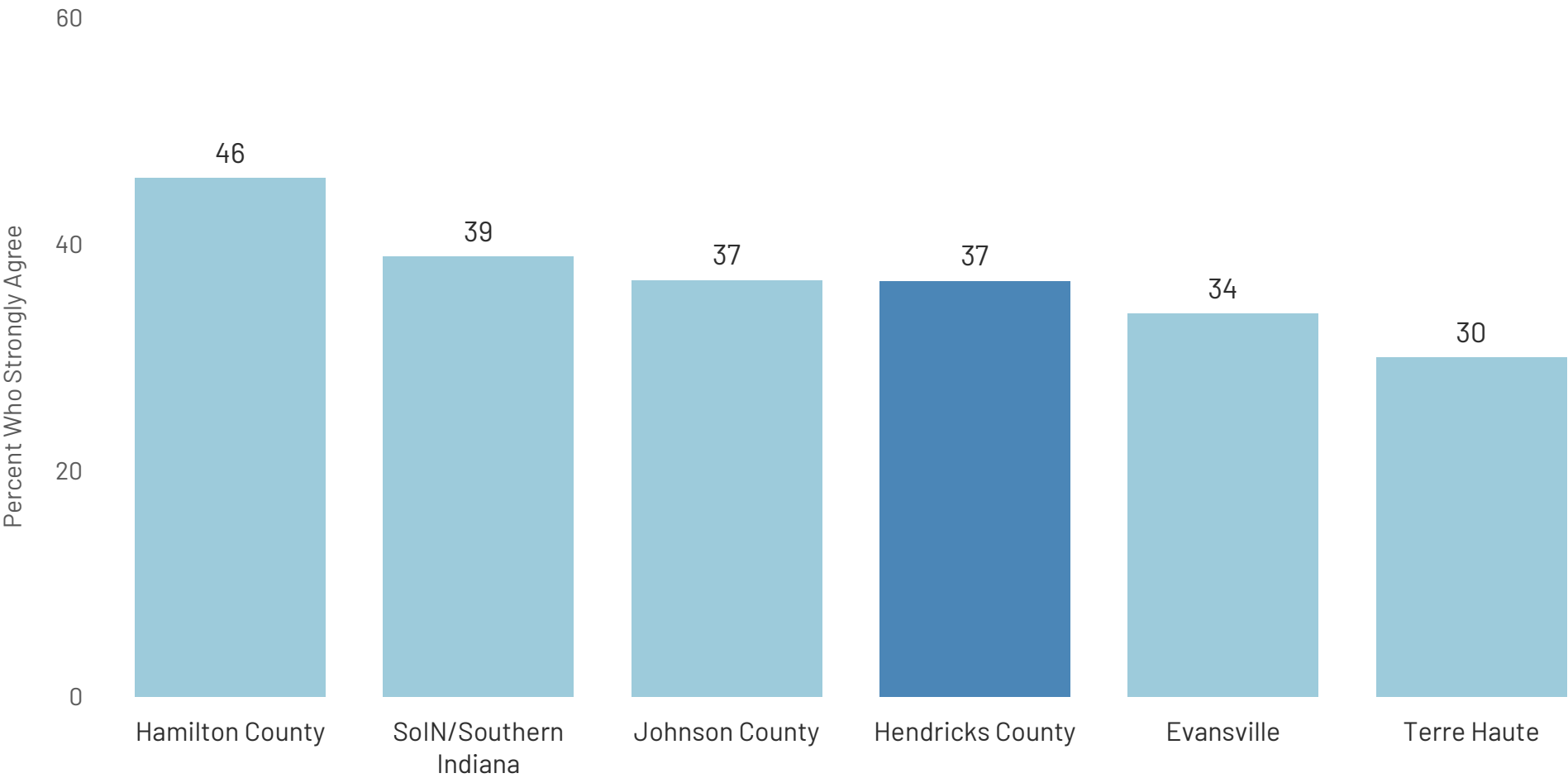
■ Hendricks County ■ Competitors

Hot Button

*Percent who strongly agree

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - FAMILY ATMOSPHERE



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - POPULAR



POPULAR

Hendricks County*

25

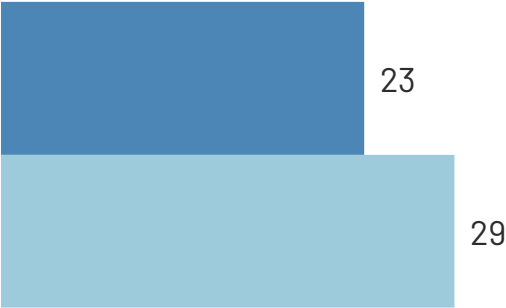
Competitors*

29

Popular with leisure travelers



Well-known destination

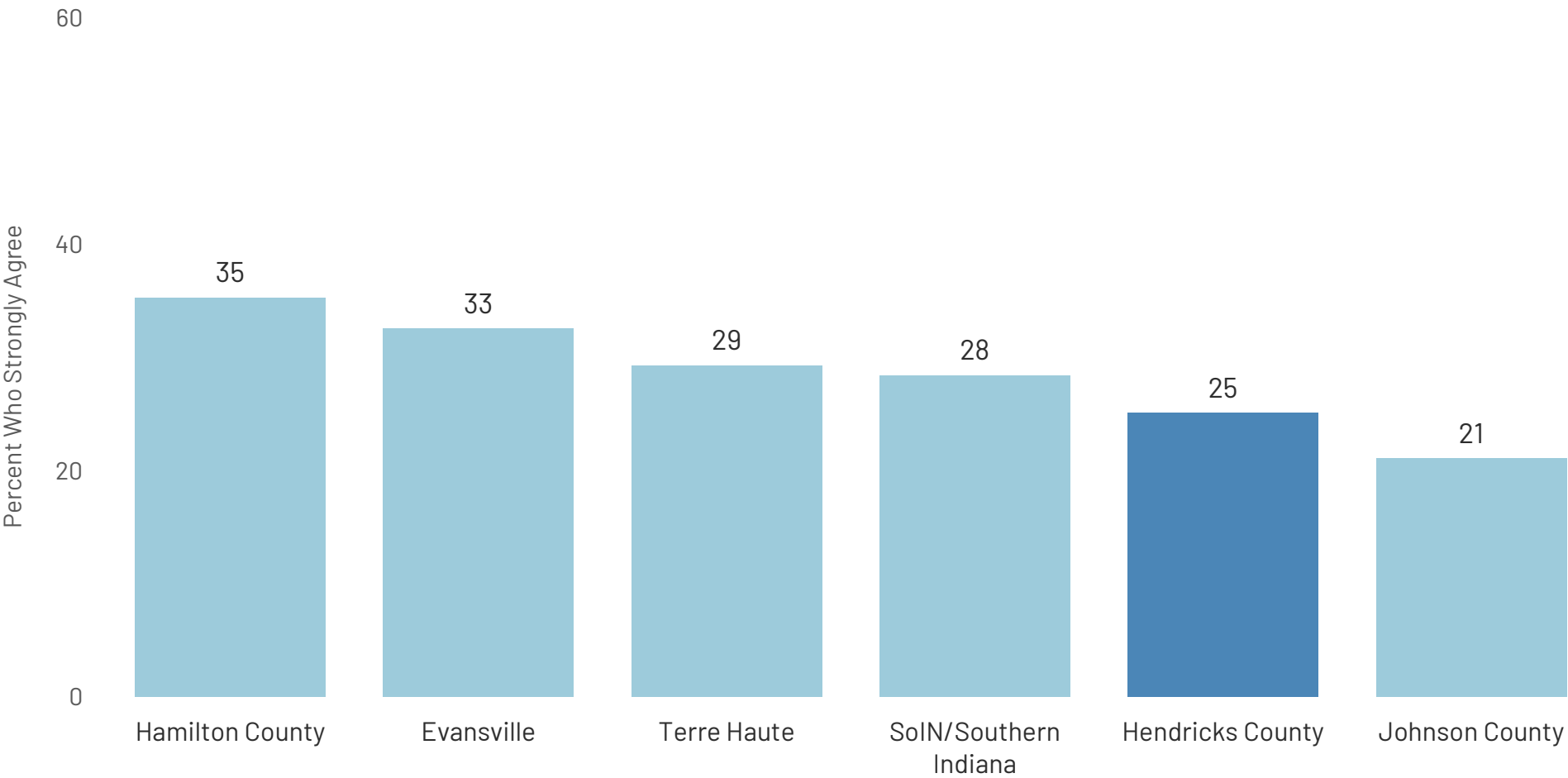


0 20 40 60
Percent Who Strongly Agree

■ Hendricks County ■ Competitors

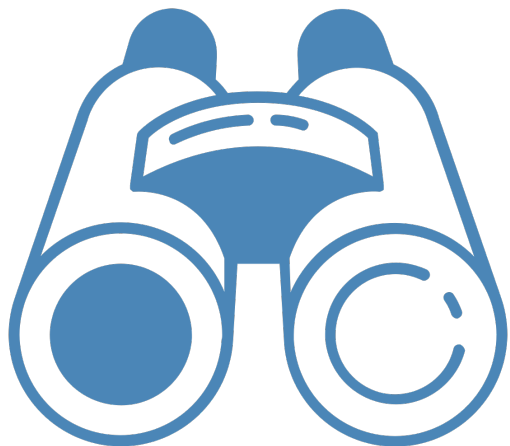
*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - POPULAR



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - SIGHTSEEING AND ENTERTAINMENT



SIGHTSEEING AND ENTERTAINMENT

Hendricks County*	Competitors*
28	31

Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

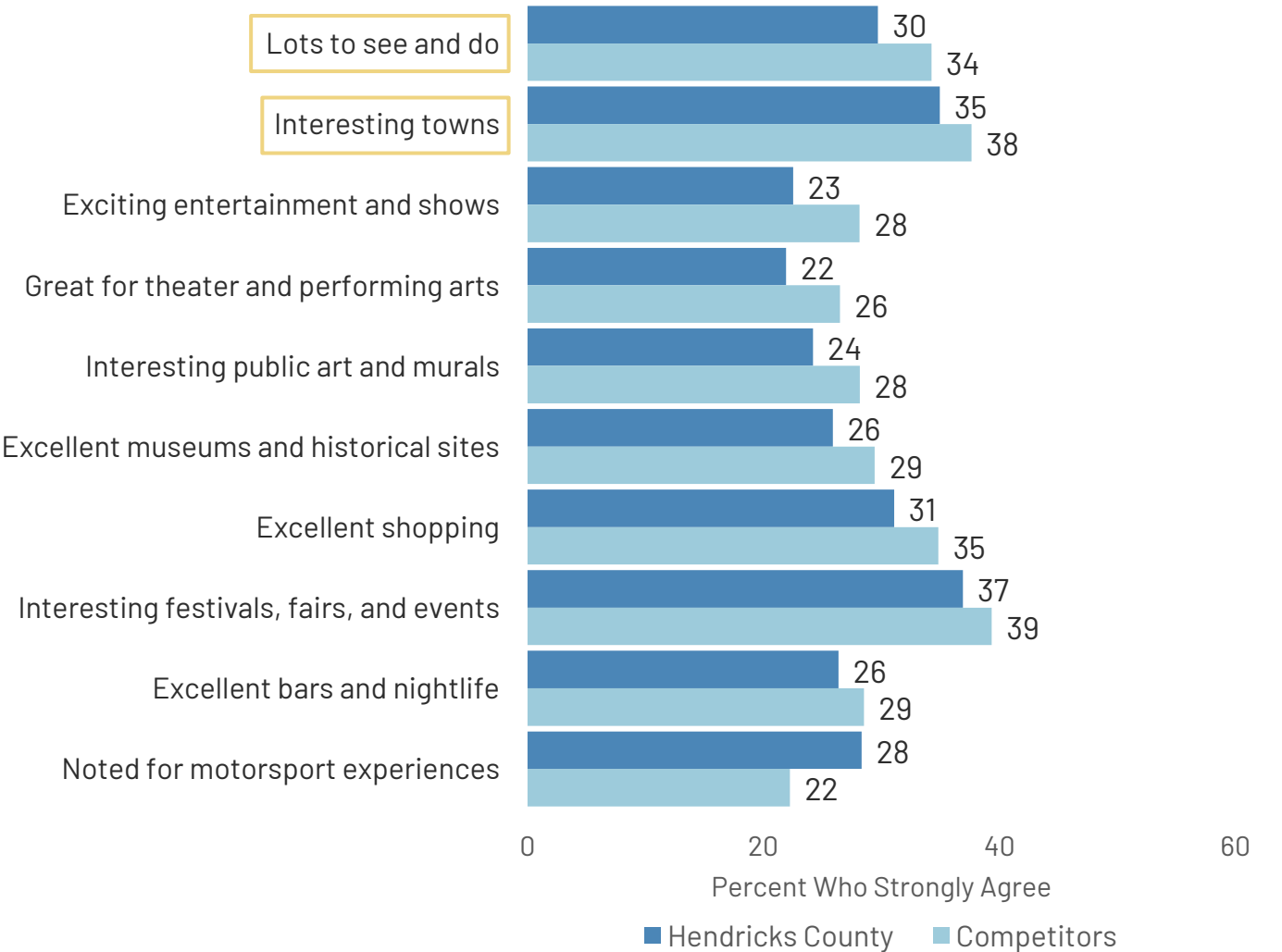
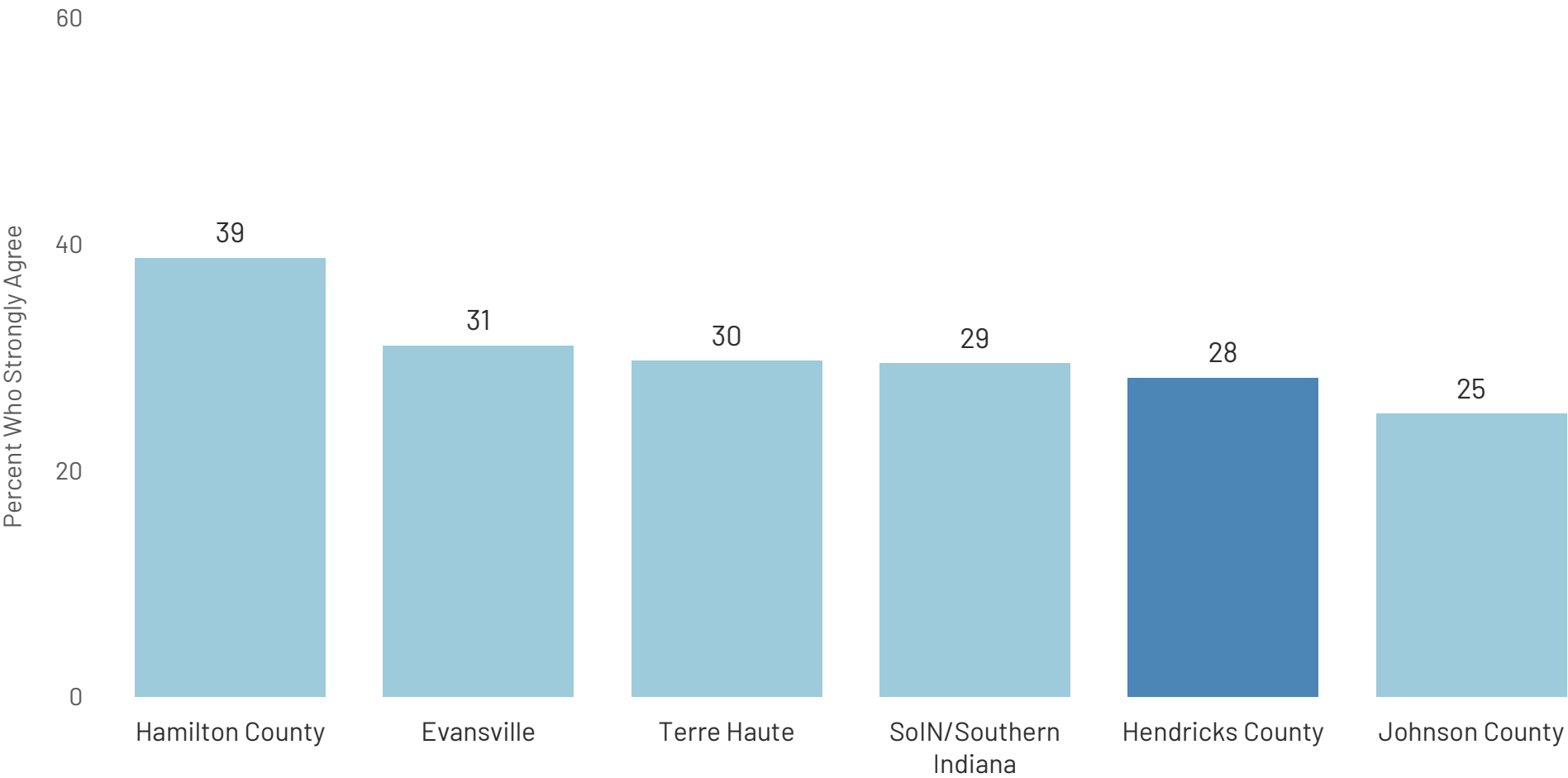


IMAGE VS. COMPETITION – SIGHTSEEING AND ENTERTAINMENT



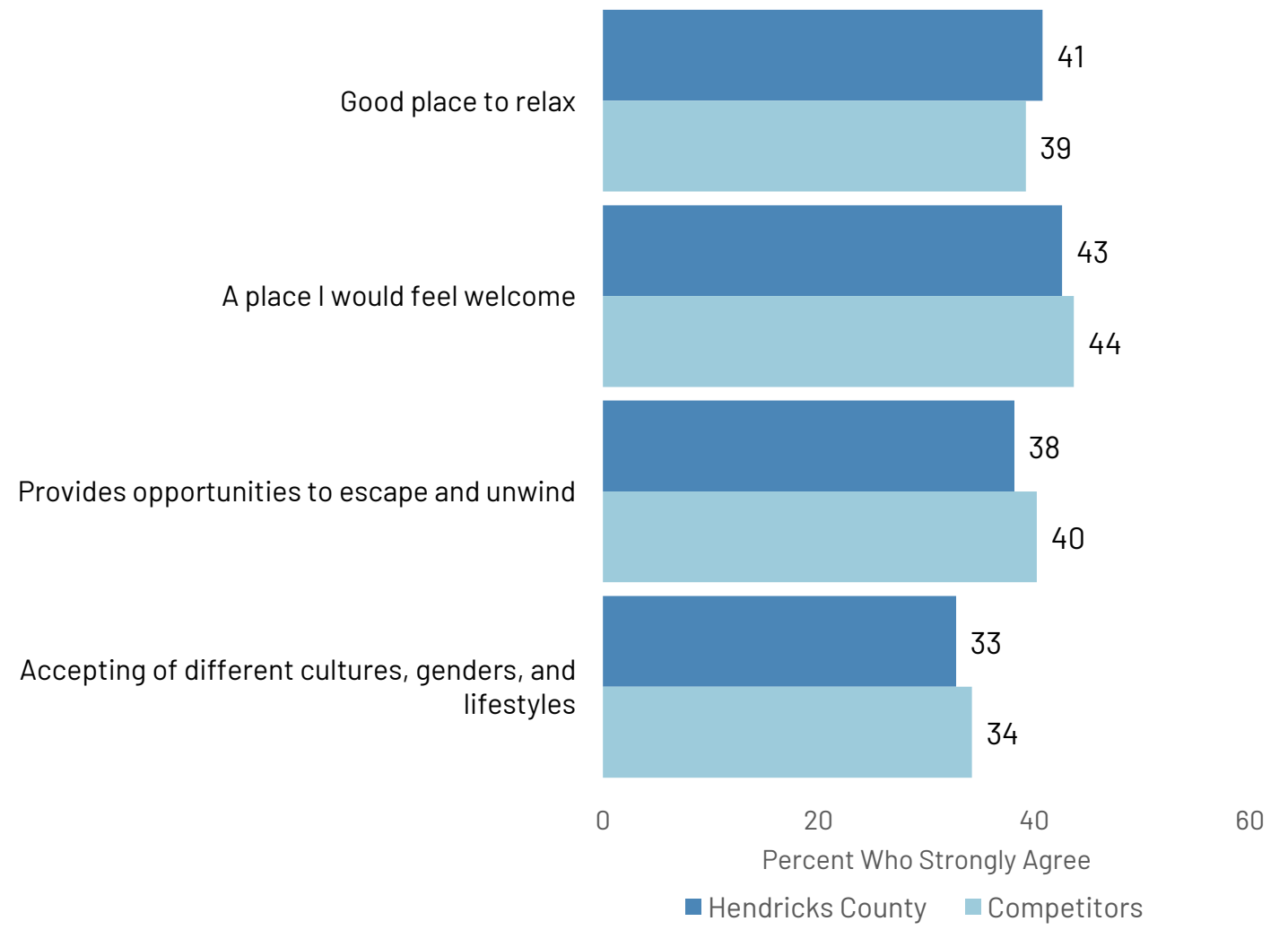
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - WORRY FREE AND WELCOMING



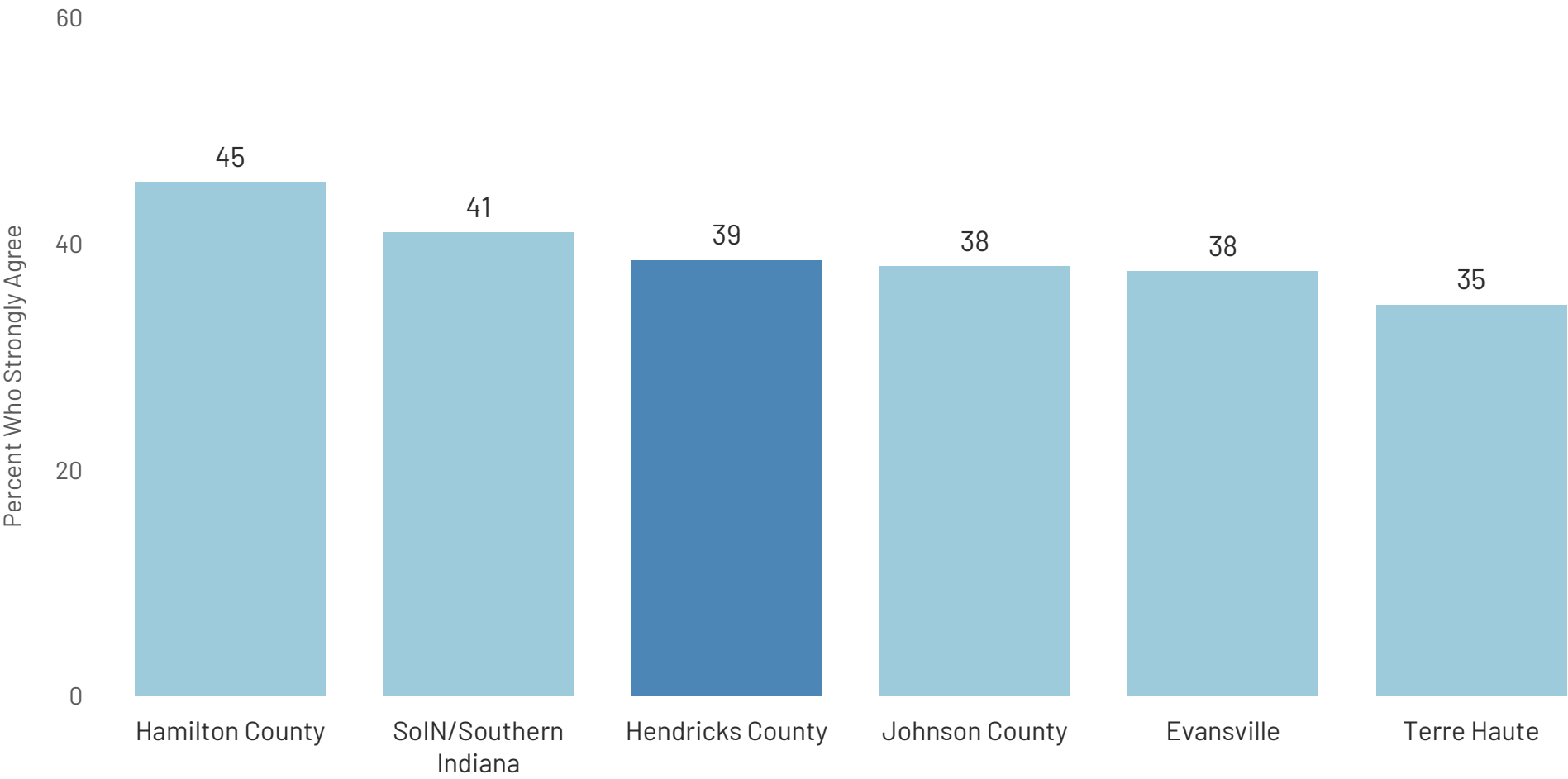
WORRY FREE AND WELCOMING

Hendricks County*	Competitors*
39	39



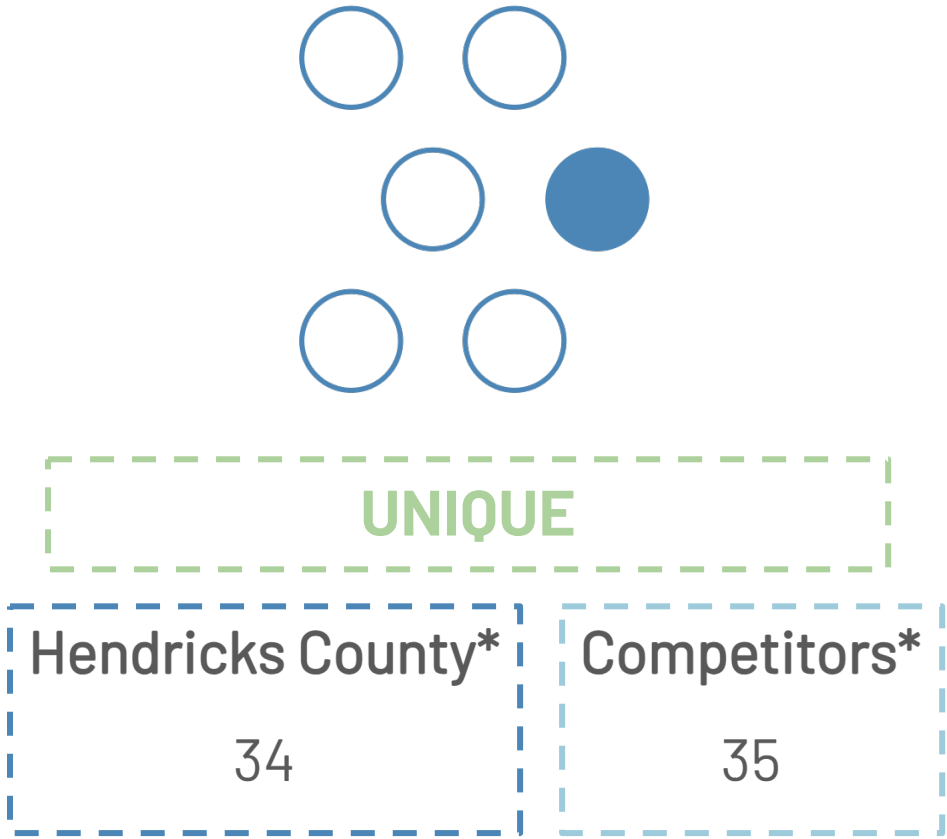
*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION – WORRY FREE AND WELCOMING



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - UNIQUE



Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

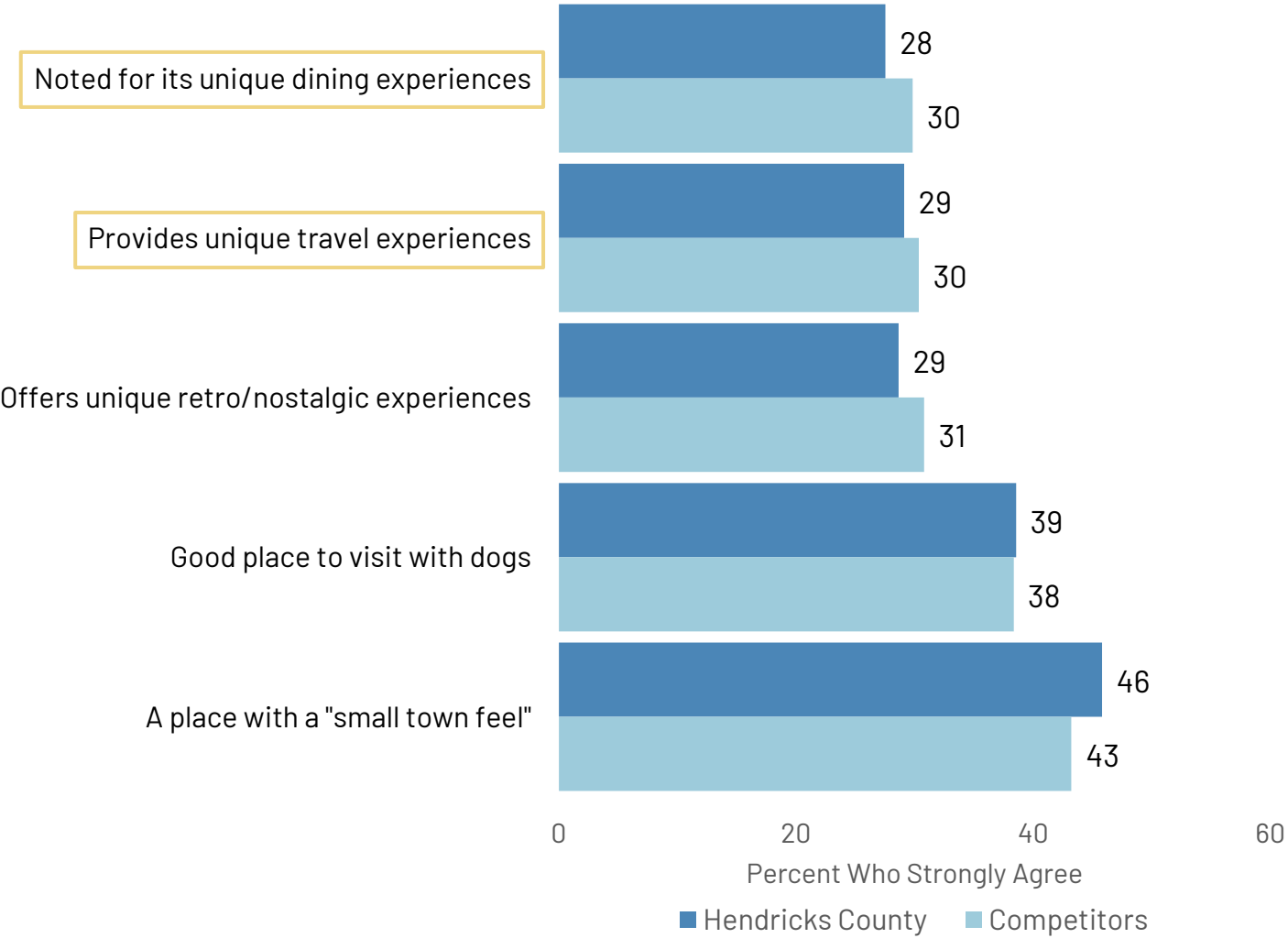
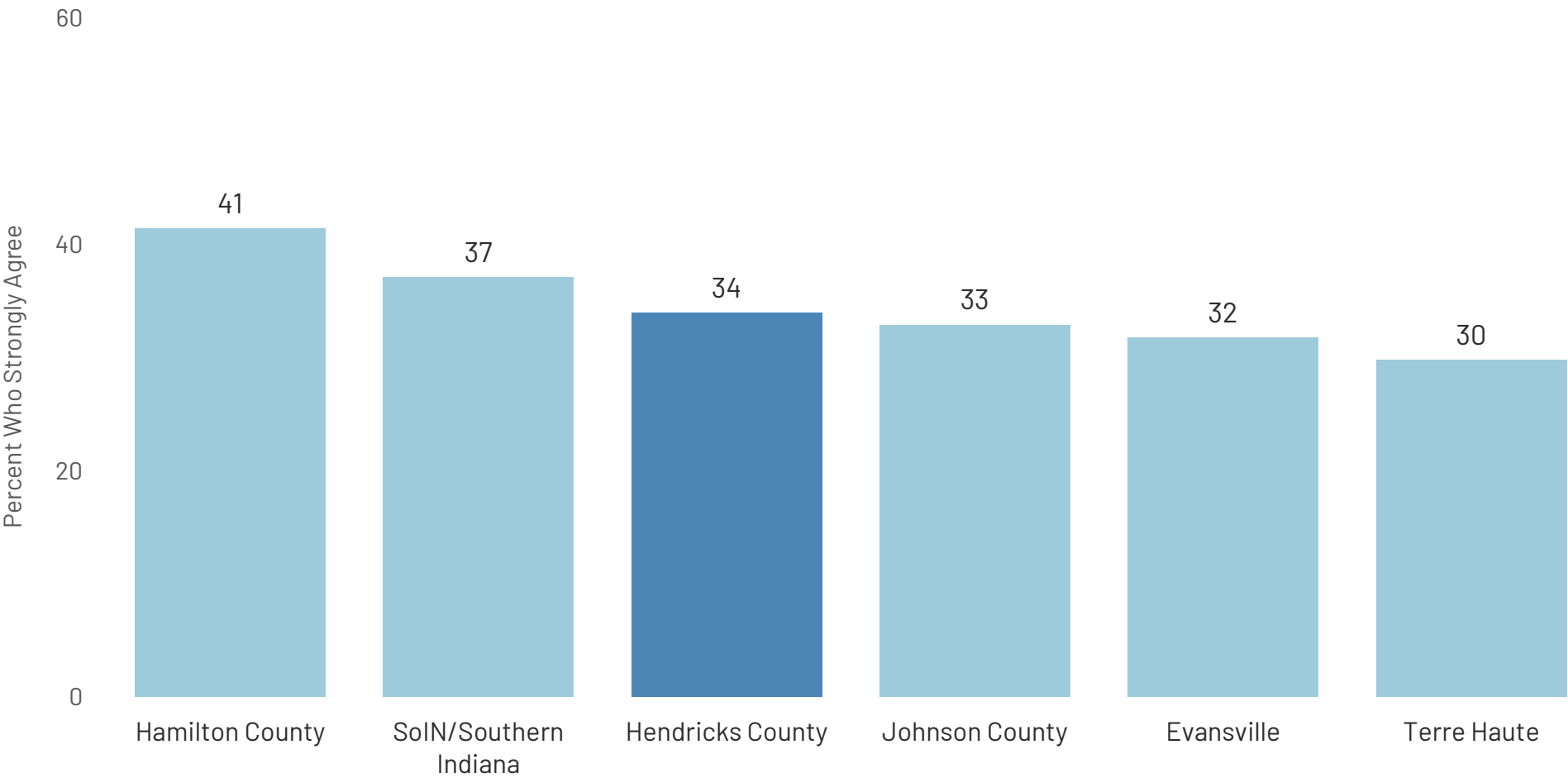


IMAGE VS. COMPETITION - UNIQUE



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - OUTDOOR RECREATION



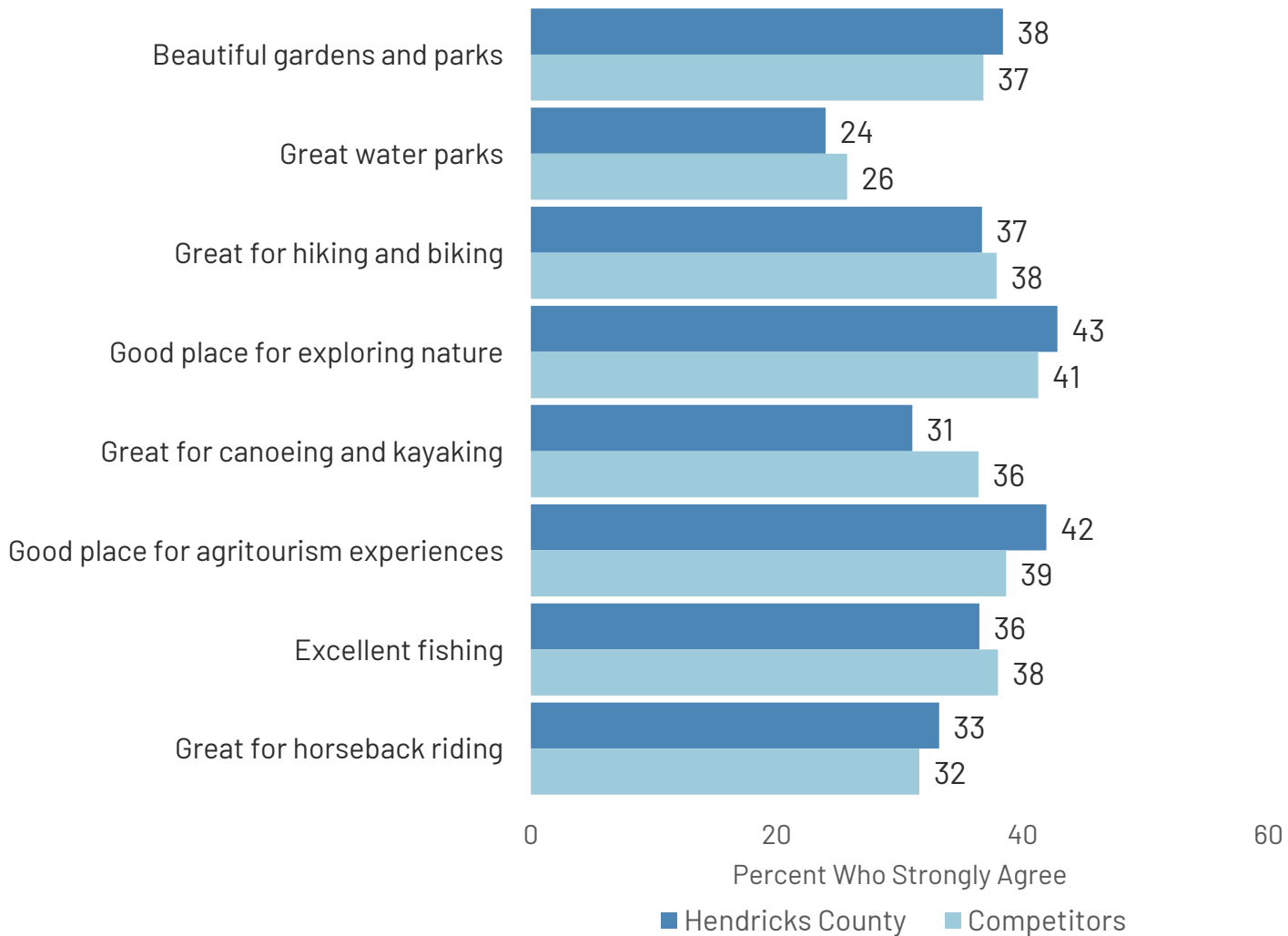
OUTDOOR RECREATION

Hendricks County*

36

Competitors*

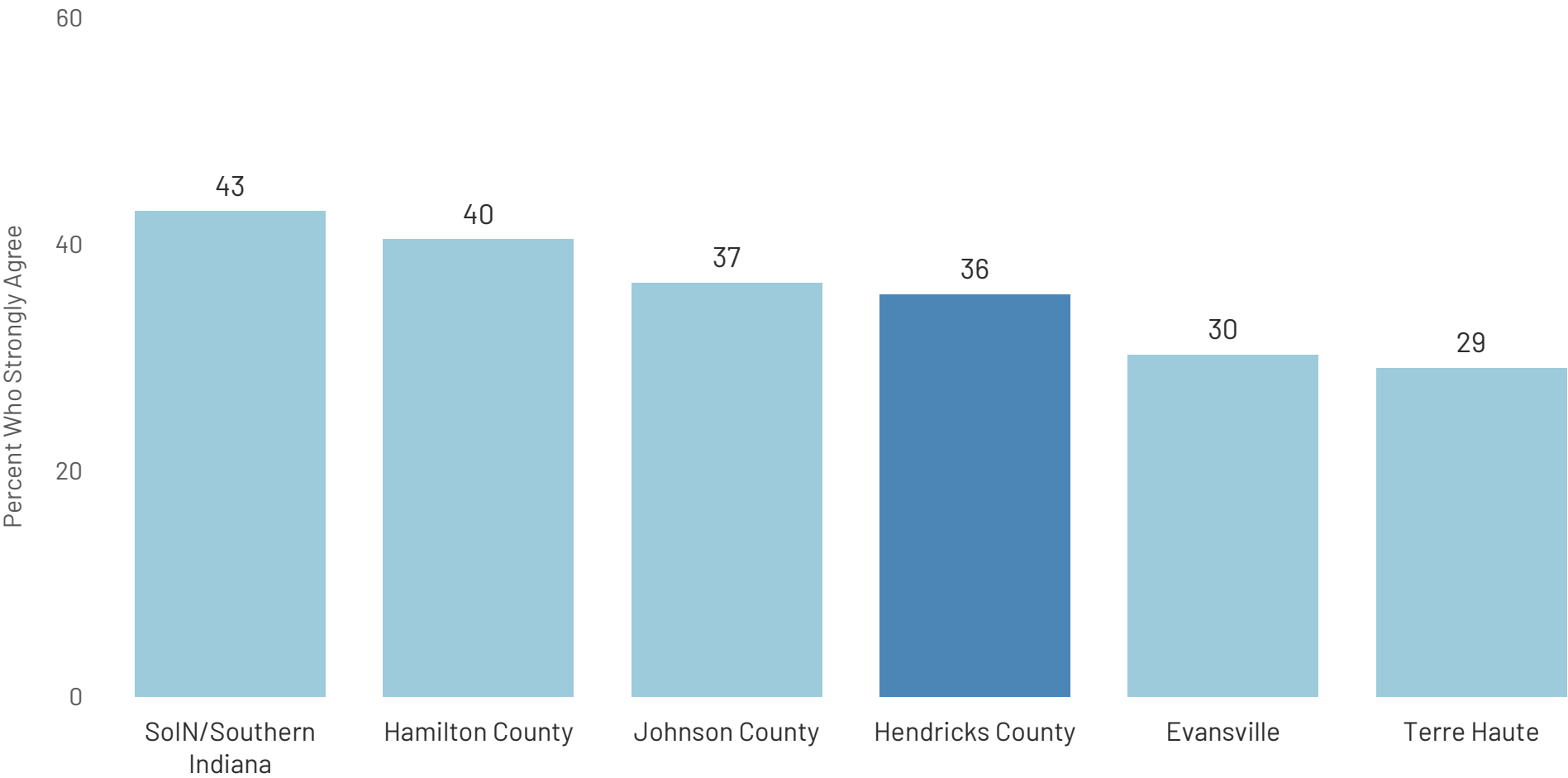
36



*Percent who strongly agree

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - OUTDOOR RECREATION



Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - AFFORDABLE



AFFORDABLE

Hendricks County*

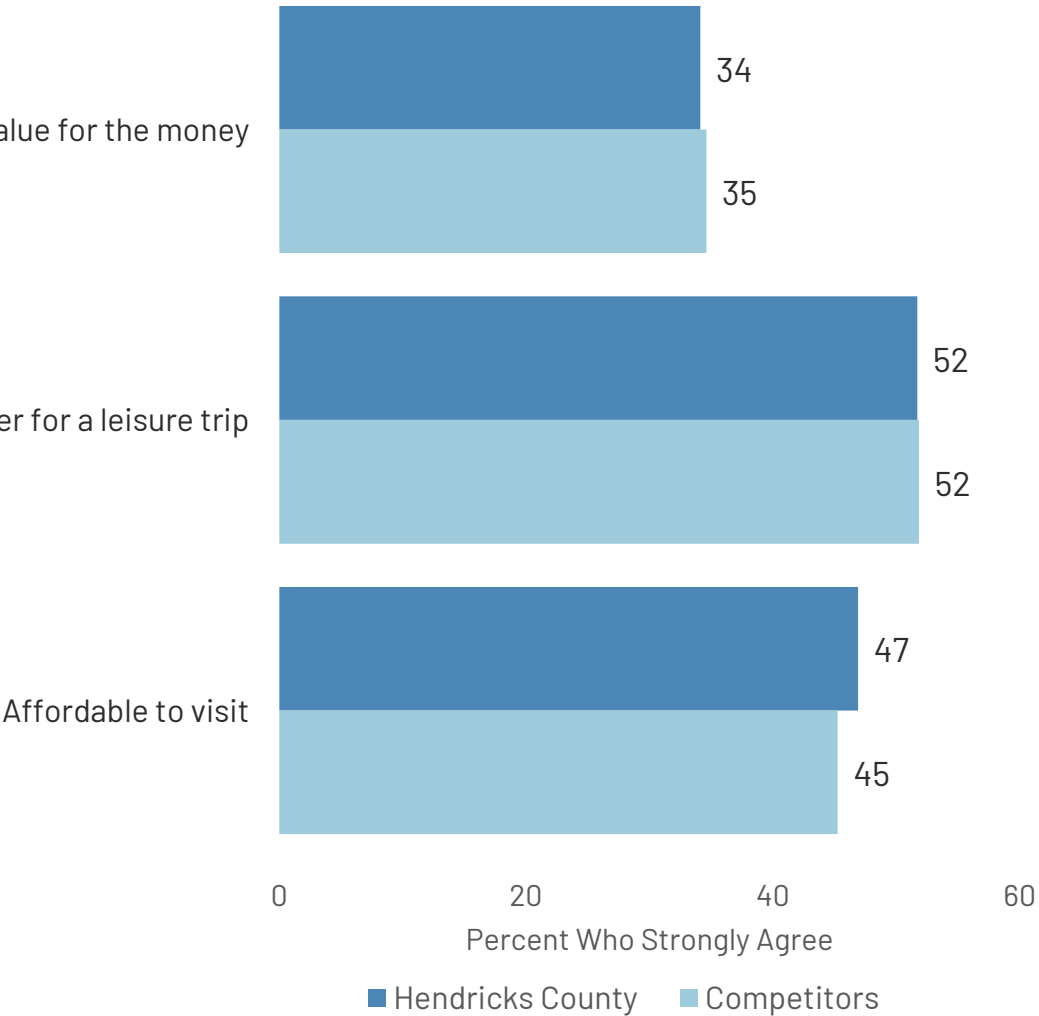
44

Competitors*

44

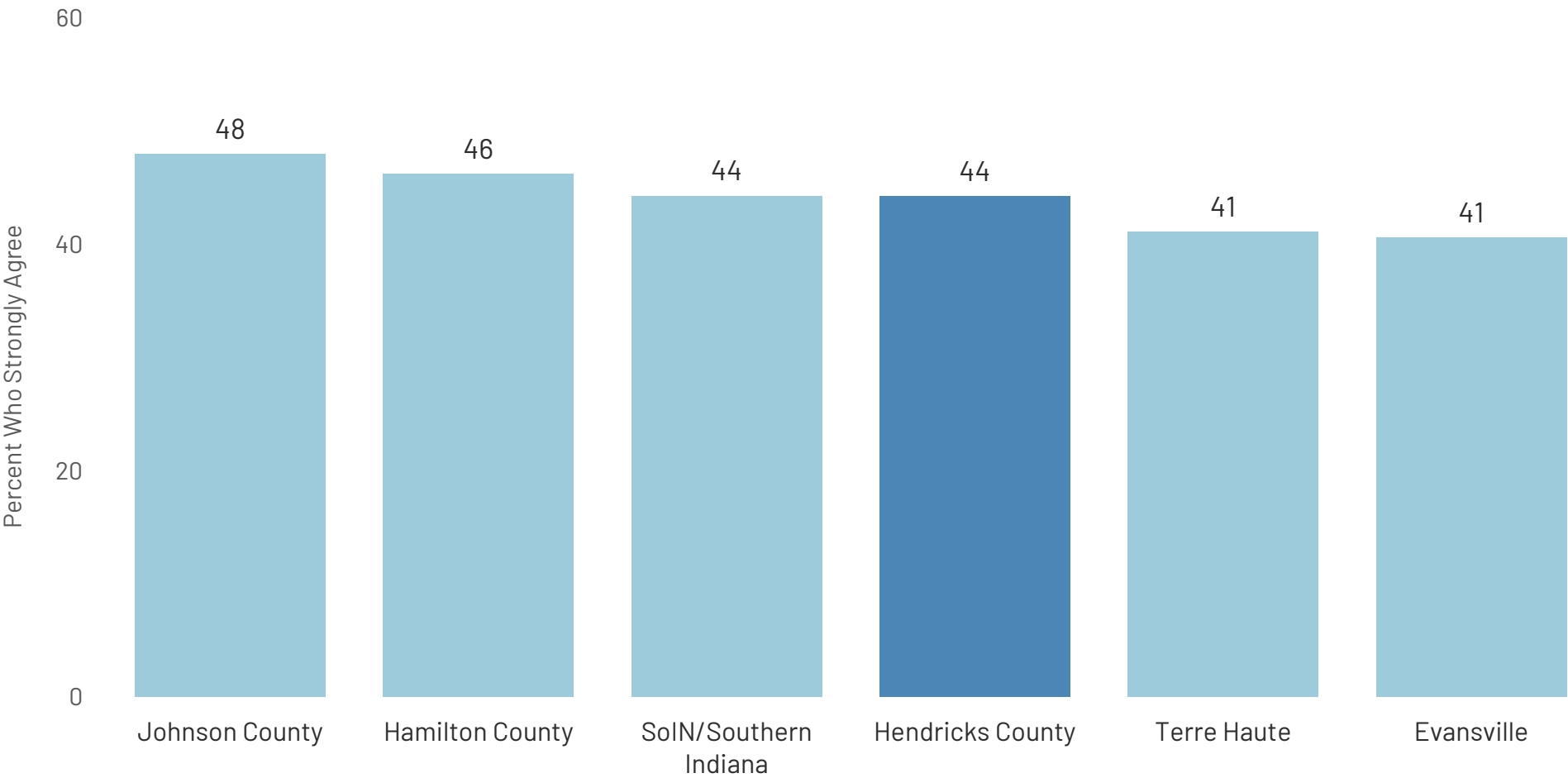
Excellent value for the money

Not too far away to consider for a leisure trip



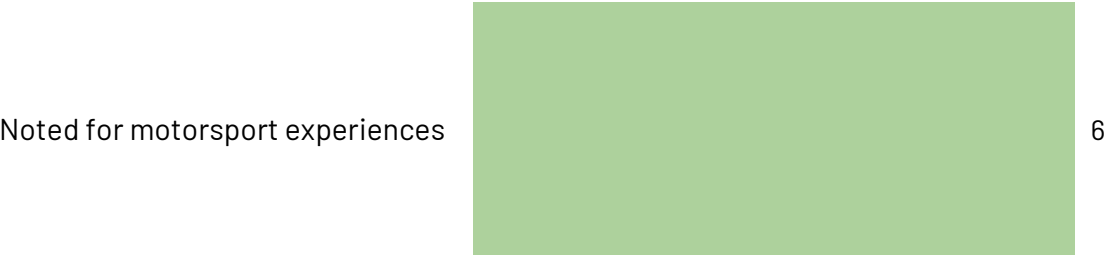
*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE VS. COMPETITION - AFFORDABLE



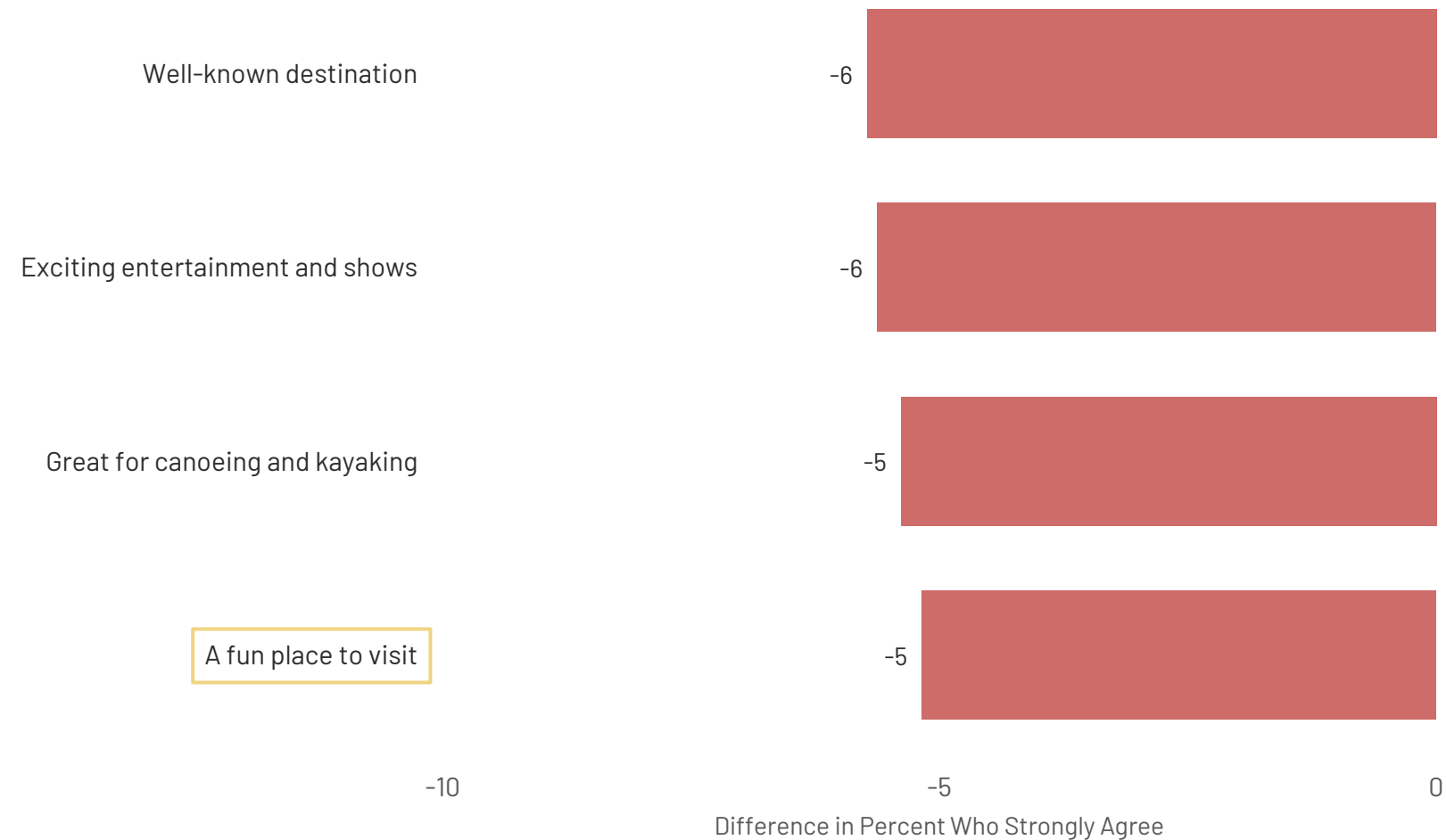
Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE STRENGTHS VS. COMPETITION



Difference in Percent Who Strongly Agree

IMAGE WEAKNESSES VS. COMPETITION



Hendricks County has four perceived weaknesses compared to the combined competitive set. This does include the Hot Button, a fun place to visit.

Hot Button

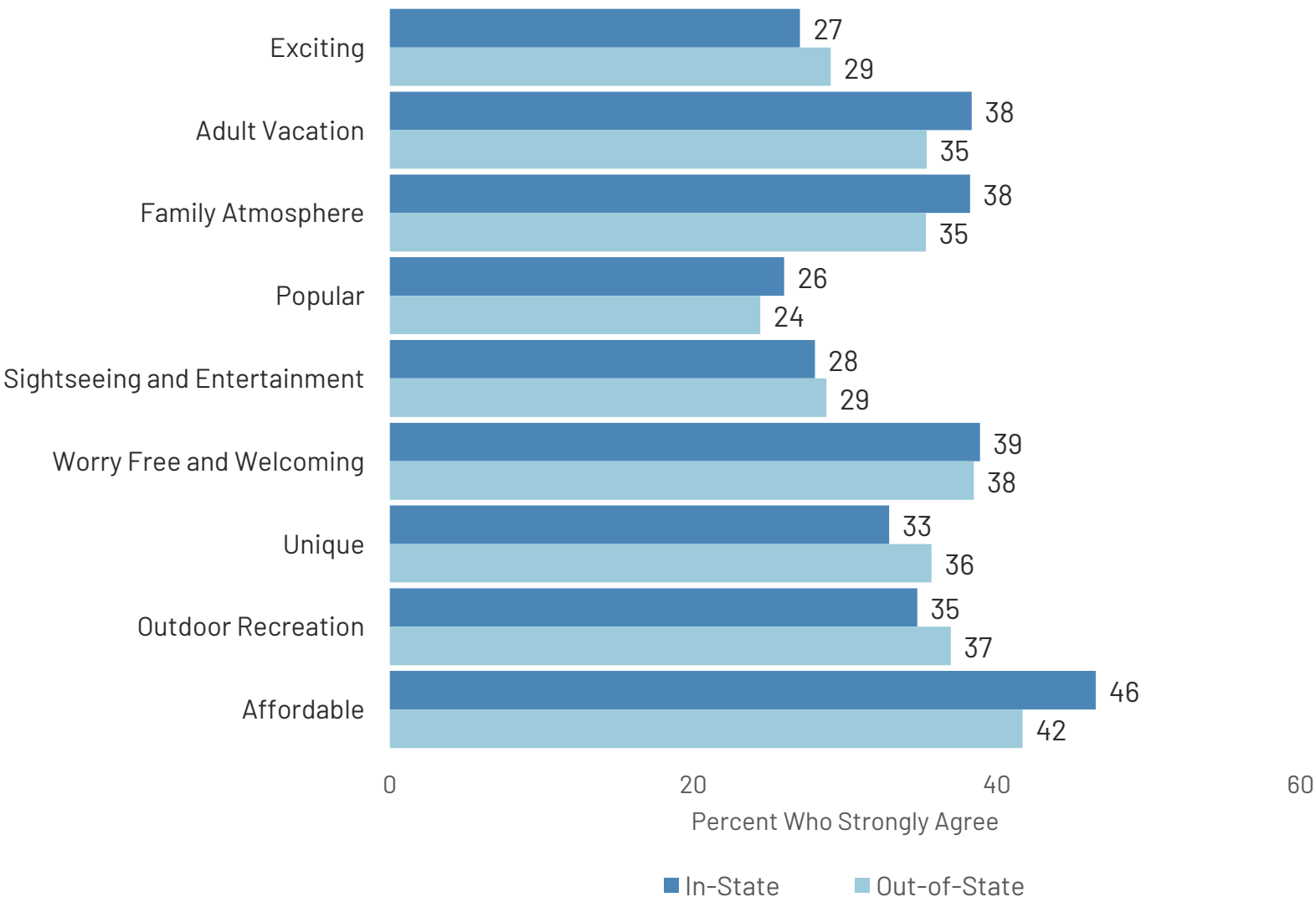


[IMAGE: IN-STATE VS. OUT-OF-STATE]



OVERALL IMAGE: IN-STATE VS. OUT-OF-STATE

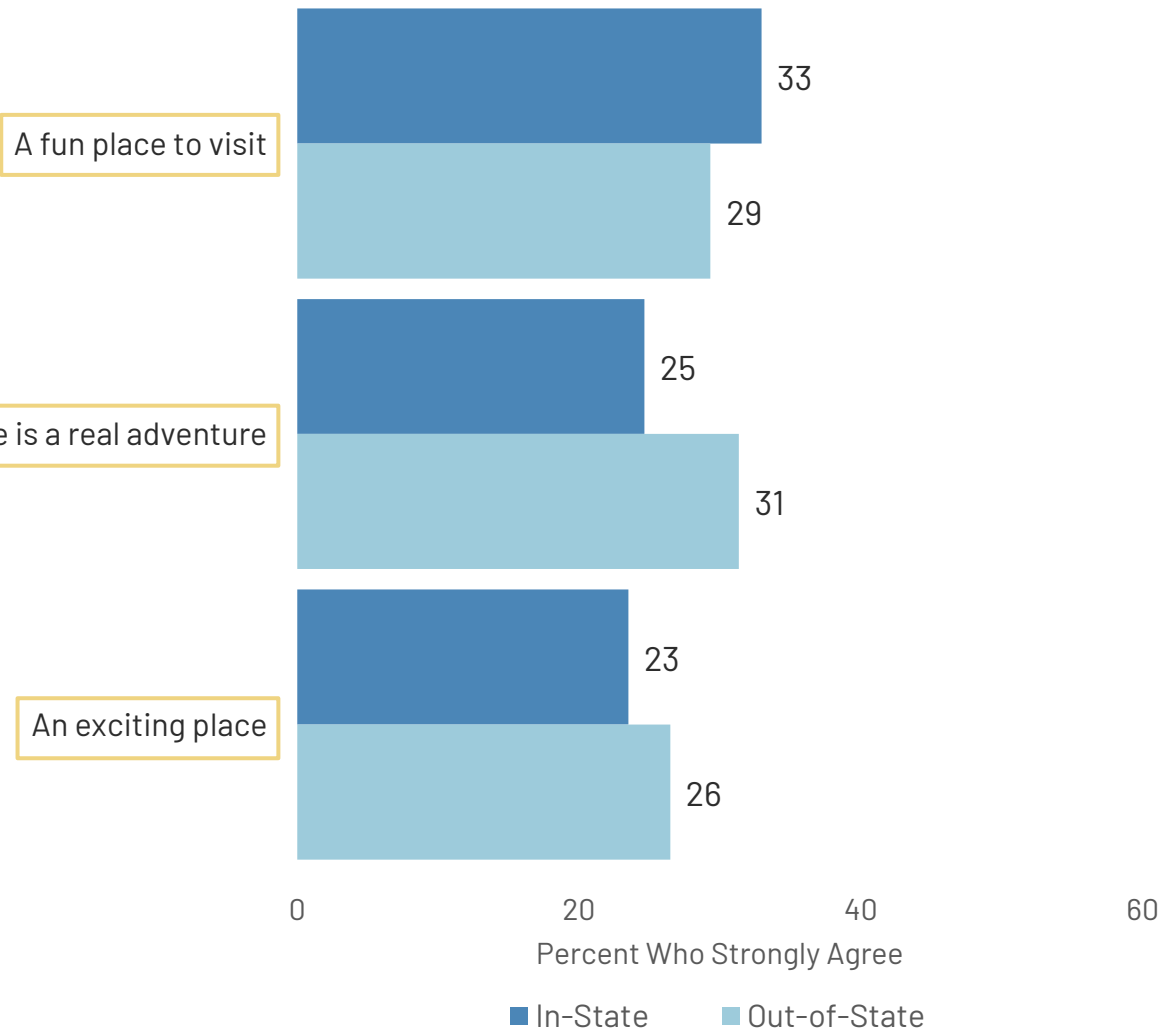
In-state travelers have similar perceptions of Hendricks County as out-of-state travelers. Affordability is the Travel Motivator category with the largest difference in those who strongly agree.



EXCITING: IN-STATE VS. OUT-OF-STATE



EXCITING	
In-State*	Out-of-State*
27	29



Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

ADULT VACATION: IN-STATE VS. OUT-OF-STATE



ADULT VACATION

In-State*

38

Out-of-State*

35

Good place to travel with friends

37

34

Good for couples

40

37

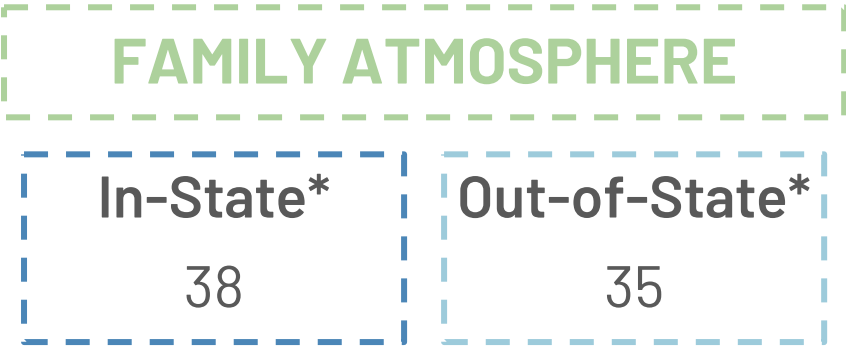
0 20 40 60
Percent Who Strongly Agree

In-State Out-of-State

Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

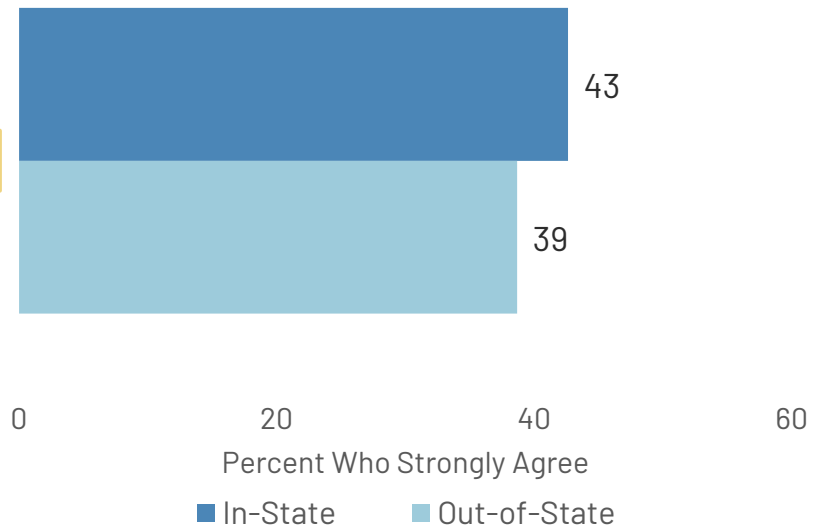
FAMILY ATMOSPHERE: IN-STATE VS. OUT-OF-STATE



Children would especially enjoy this place



Good place for families to visit



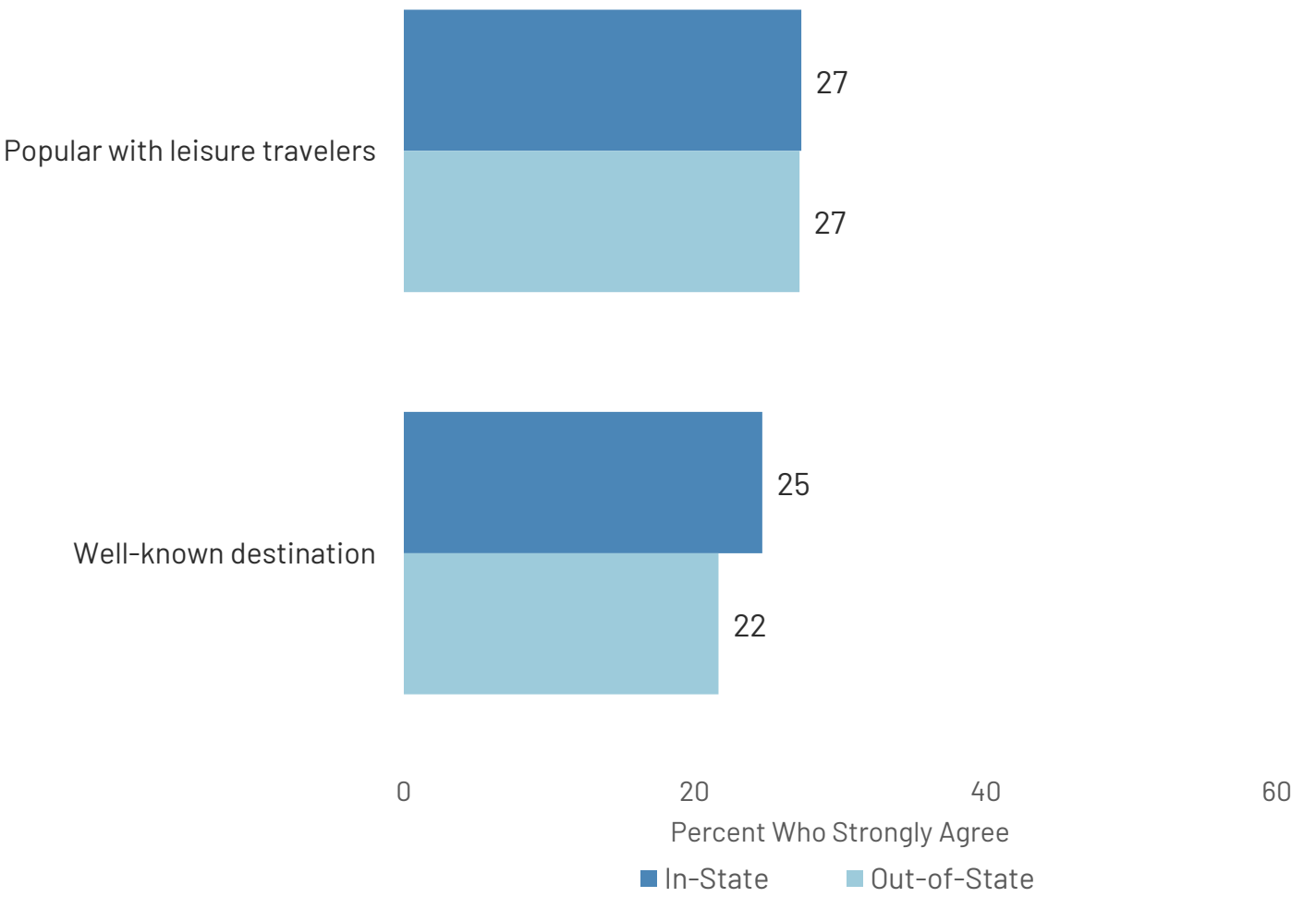
Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

POPULAR: IN-STATE VS. OUT-OF-STATE

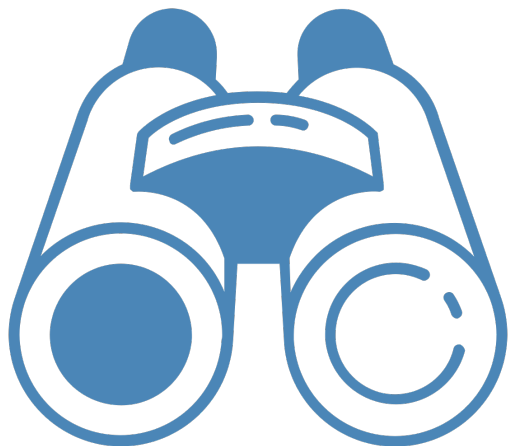


POPULAR	
In-State*	Out-of-State*
26	24



*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

SIGHTSEEING AND ENTERTAINMENT: IN-STATE VS. OUT-OF-STATE

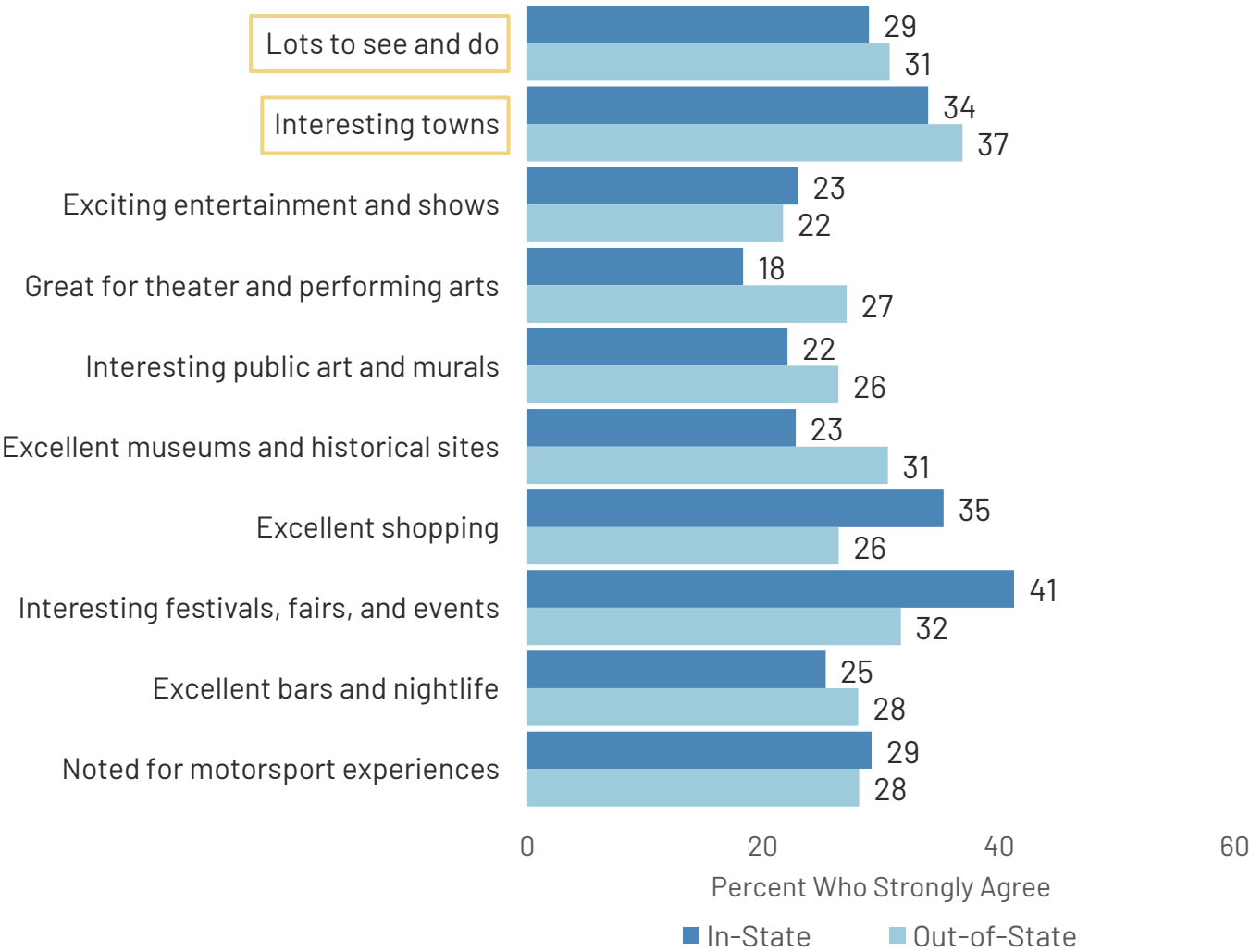


SIGHTSEEING AND ENTERTAINMENT

In-State*	Out-of-State*
28	29

Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

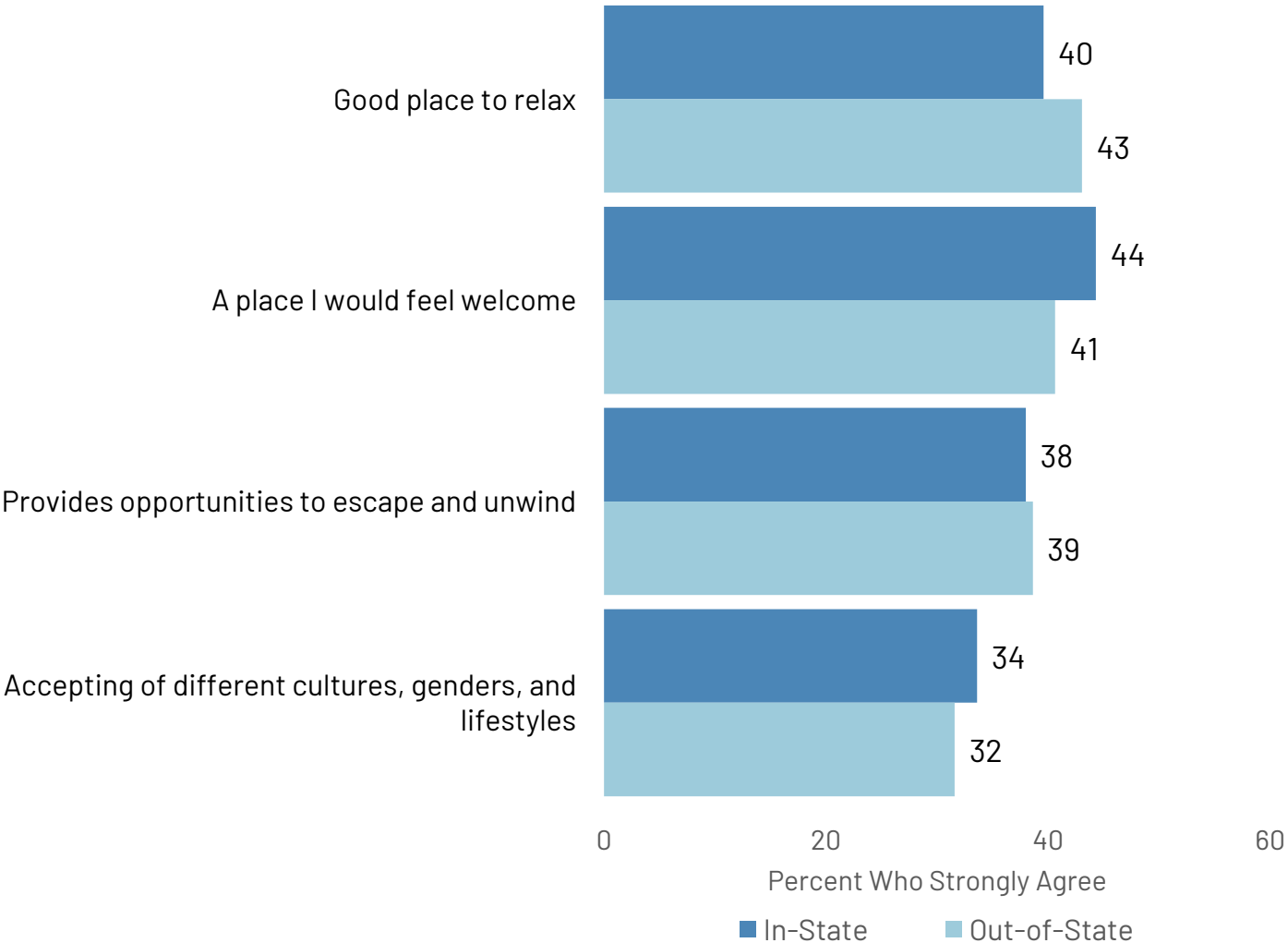


WORRY FREE AND WELCOMING: IN-STATE VS. OUT-OF-STATE



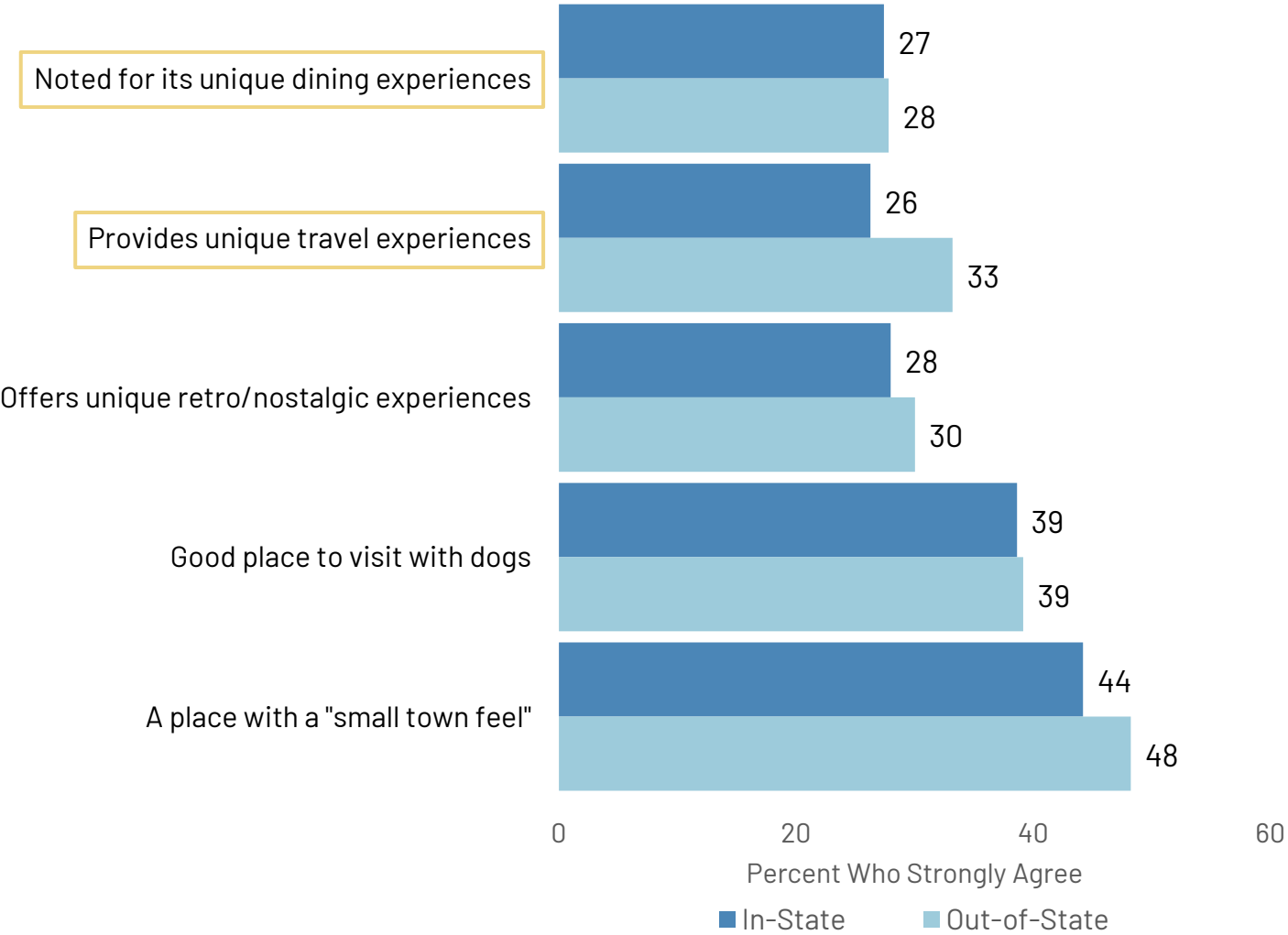
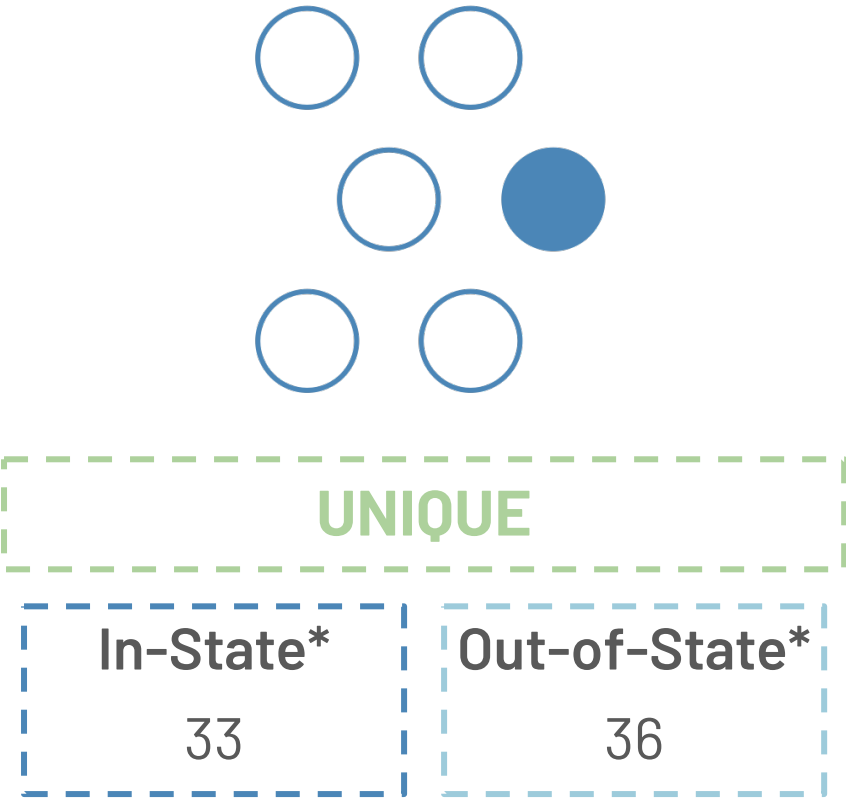
WORRY FREE AND WELCOMING

In-State*	Out-of-State*
39	38



*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

UNIQUE: IN-STATE VS. OUT-OF-STATE



Hot Button

*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets

OUTDOOR RECREATION: IN-STATE VS. OUT-OF-STATE



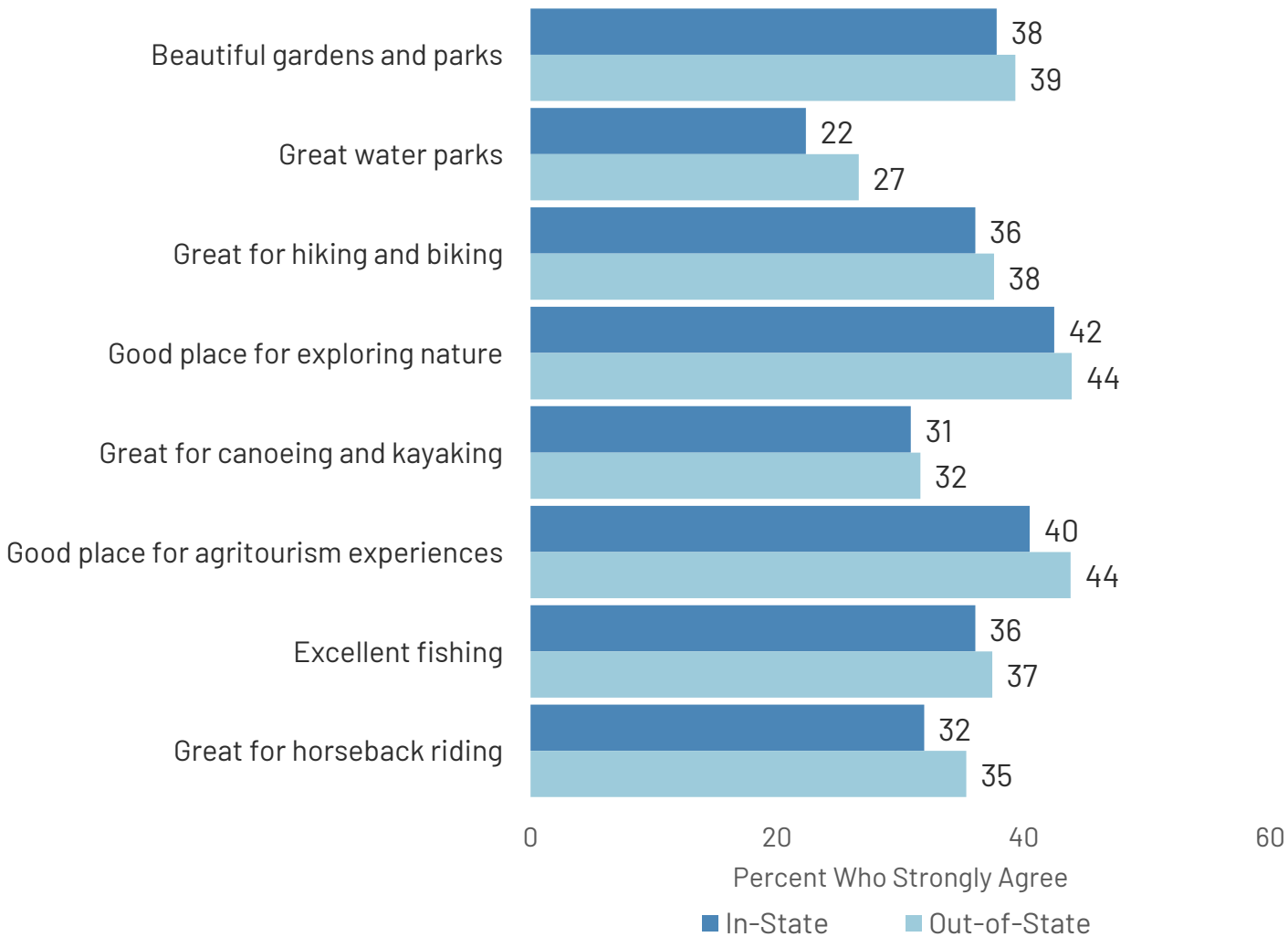
OUTDOOR RECREATION

In-State*

35

Out-of-State*

37



*Percent who strongly agree

Base: Residents of Hendricks County's Regional Advertising Markets

AFFORDABLE: IN-STATE VS. OUT-OF-STATE



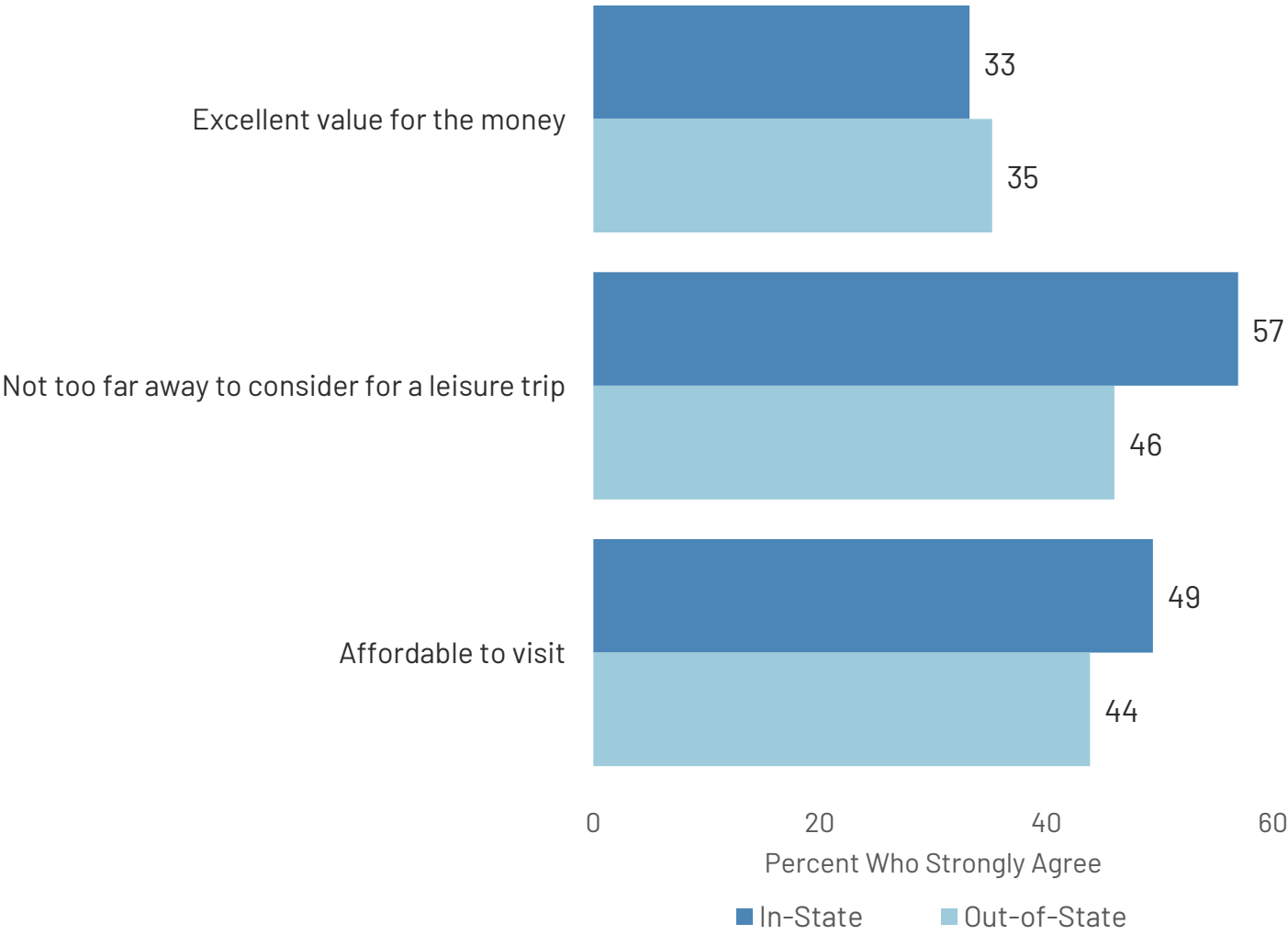
AFFORDABLE

In-State*

46

Out-of-State*

42



*Percent who strongly agree
Base: Residents of Hendricks County's Regional Advertising Markets



"HALO EFFECT" ON ECONOMIC DEVELOPMENT



WHAT IS THE "HALO EFFECT"?

THE "HALO EFFECT"

Research has long demonstrated that tourism advertising and the visitation it inspires have a **positive impact on consumers' image** of destinations as a place for leisure travel and recreation.

Applying the psychological concept of the **"halo effect"** to tourism promotion advertising, Longwoods set out to determine if gains in image for Hendricks County from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that **economic objectives could also be achieved**, such as viewing Hendricks County more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?

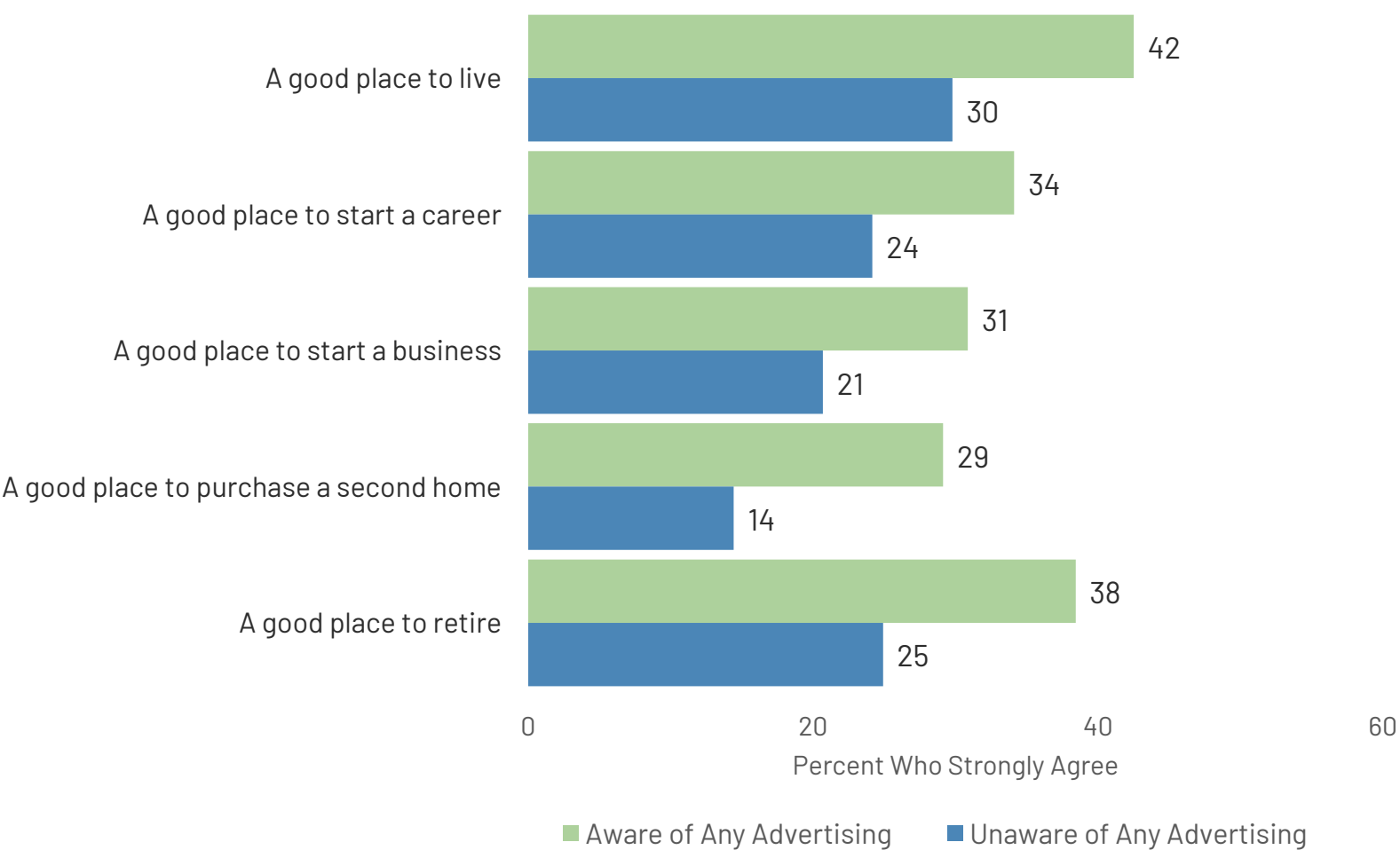


IMPACT OF TOURISM AD AWARENESS ON ECONOMIC DEVELOPMENT IMAGE

In the first Halo Effect data analysis, Longwoods compared the percentage of travelers aware of Hendricks County's advertising, who strongly agreed with each of the economic development variables, to travelers that were unaware of the campaign.

In every case, Hendricks County's tourism advertising significantly improved the image of the county for a wide range of economic development objectives.

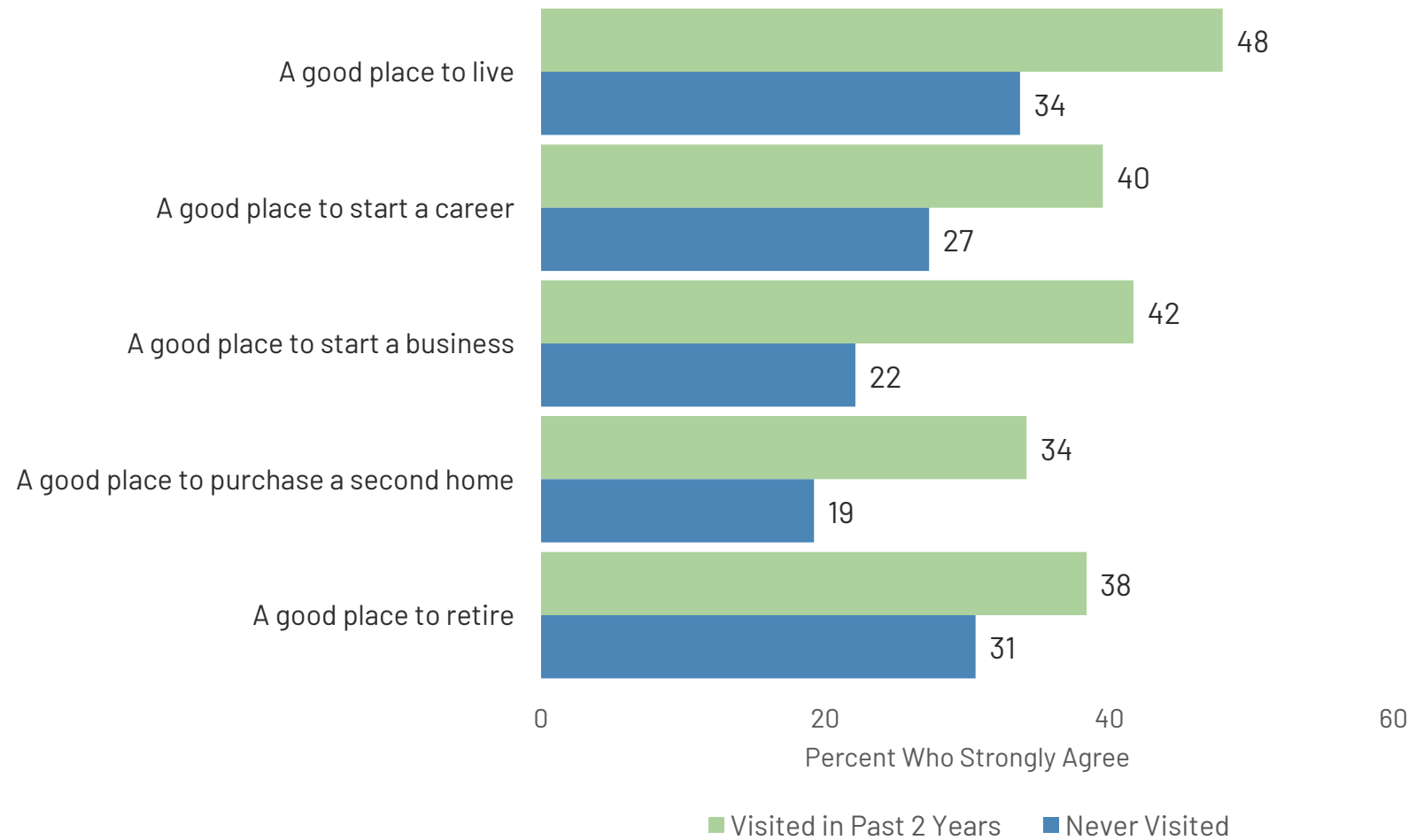
Those who saw the advertising rated Hendricks County higher on all the economic development indicators.



IMPACT OF VISITATION ON ECONOMIC DEVELOPMENT IMAGE

Next, Longwoods compared the percentage of travelers who have visited the county recently to those who have never visited.

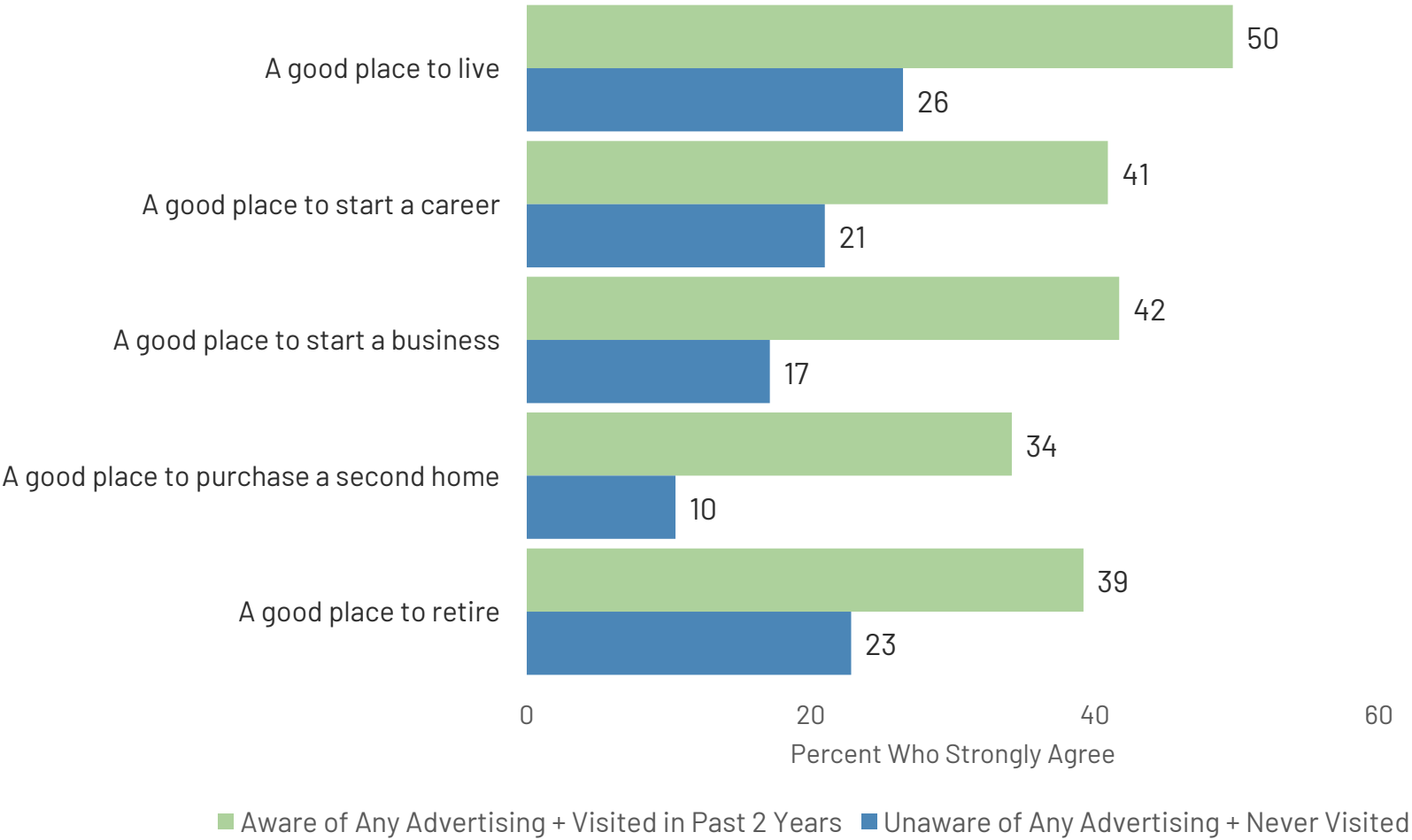
Travelers who visited Hendricks County during the past two years also consistently rated the county higher than those who have never visited.



IMPACT OF AD AWARENESS + VISITATION ON ECONOMIC DEVELOPMENT IMAGE

In the final analysis, Longwoods compared the strongly agree results of travelers who were both aware of the Hendricks County advertising and have visited in the past 2 years to those who were unaware of the campaign and have never visited.

For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising message and who also visited Hendricks County.

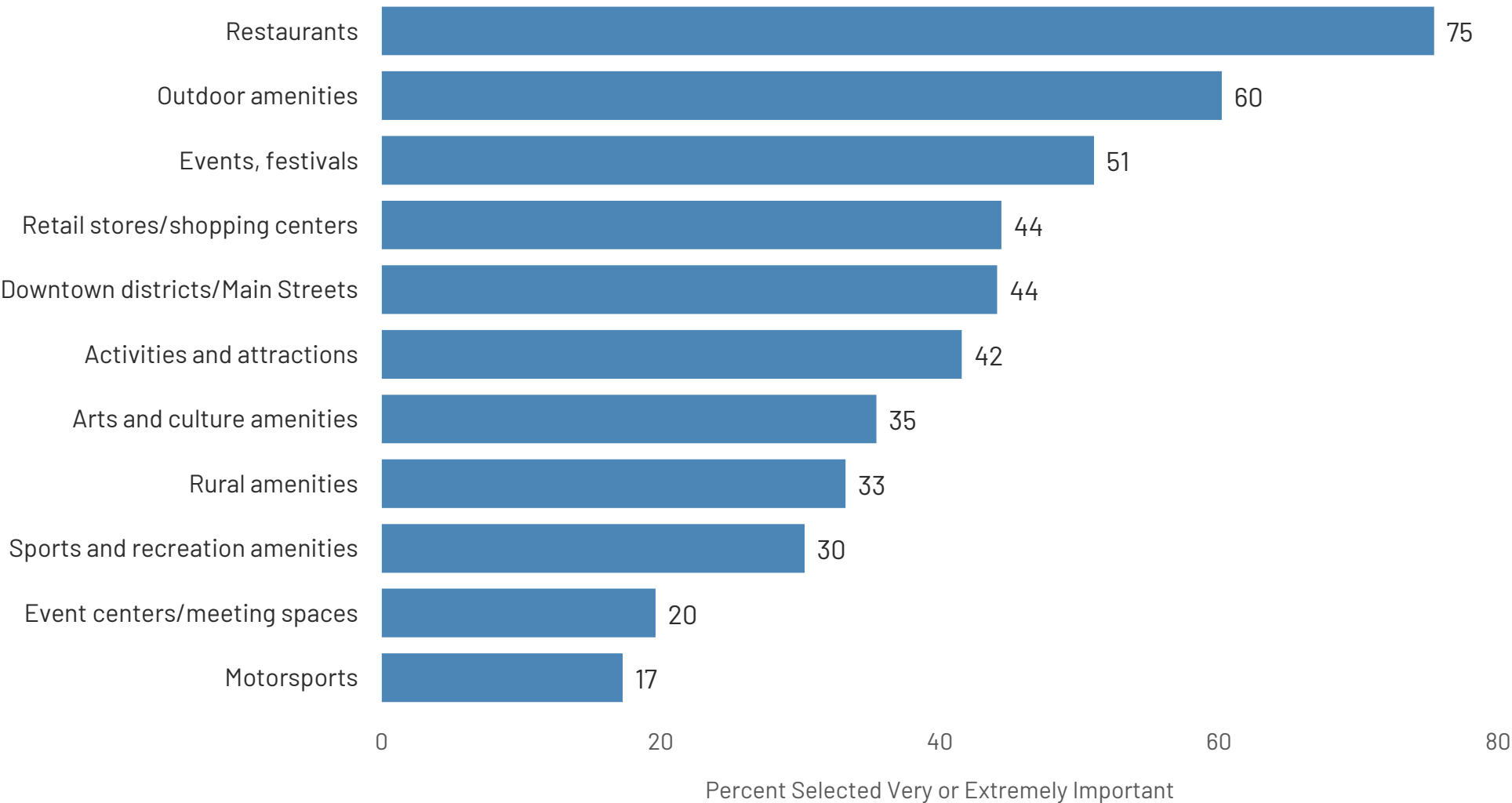




[CUSTOM QUESTION]



IMPORTANCE OF AMENITIES/ACTIVITIES FOR LEISURE TRIPS



How important are each of the following amenities/activities when considering destinations for a leisure trip?
Base: Residents of Hendricks County's Regional Advertising Markets



APPENDIX: IMAGE STRENGTHS AND WEAKNESSES VS. INDIVIDUAL COMPETITION



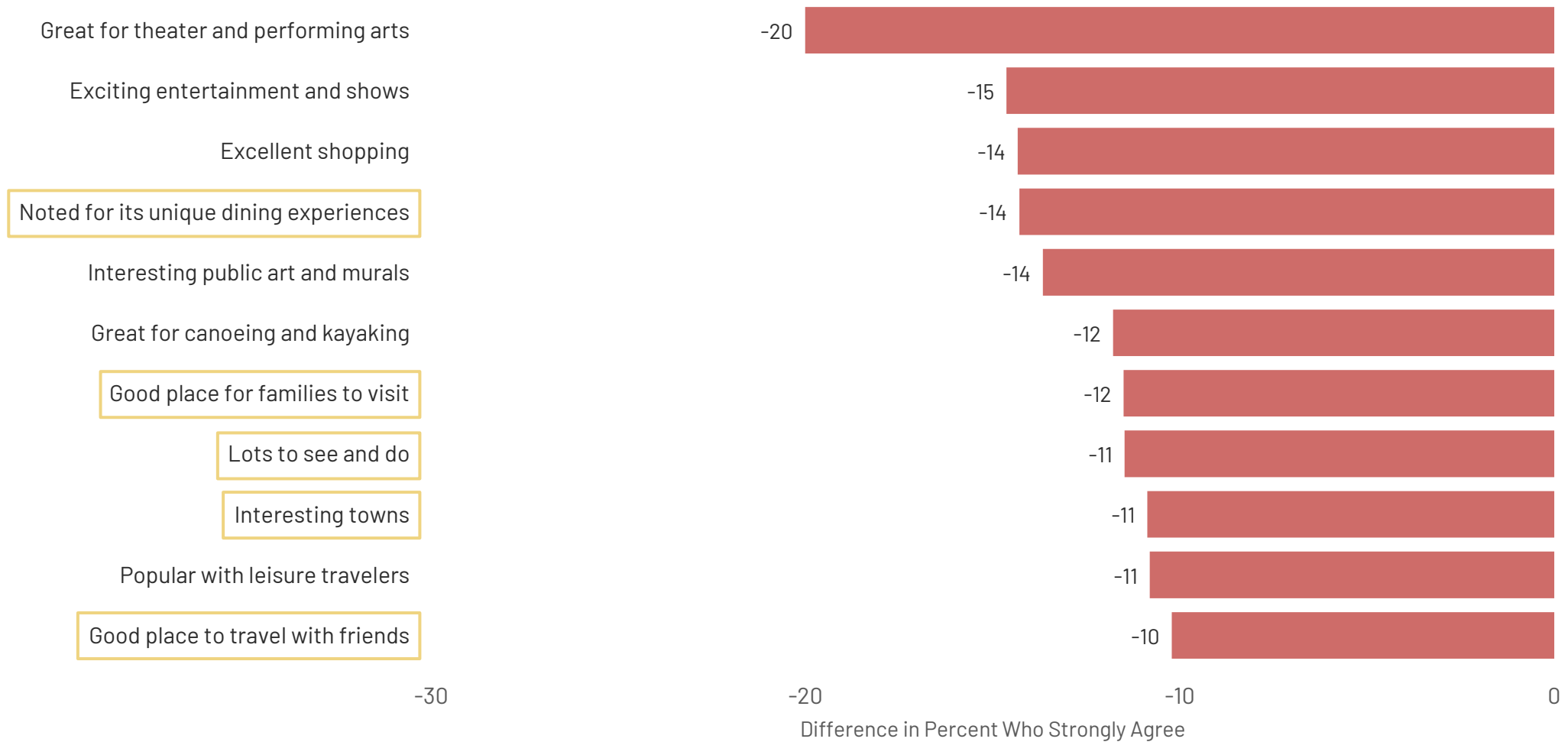


HENDRICKS COUNTY VS. HAMILTON COUNTY: IMAGE STRENGTHS AND WEAKNESSES



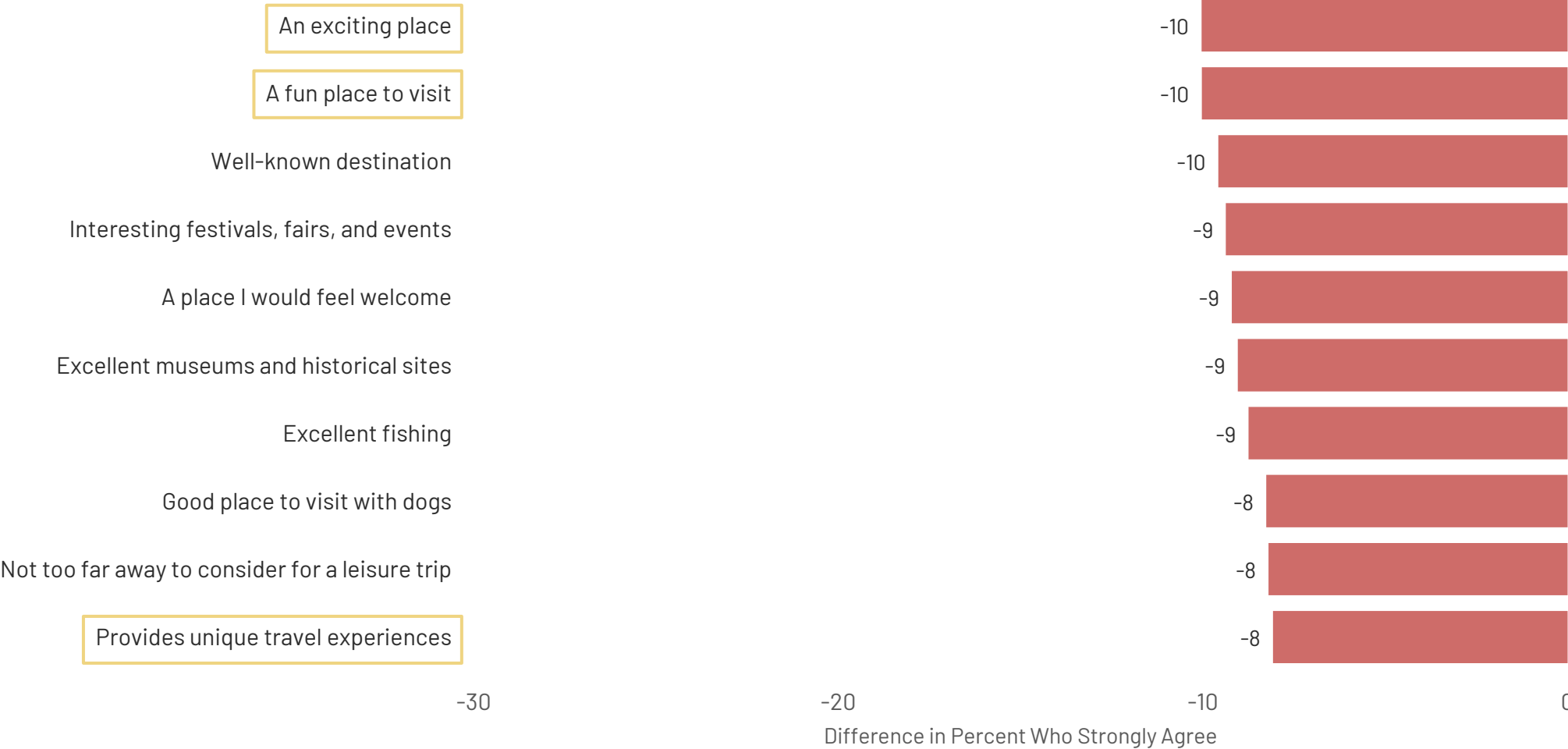
**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE STRENGTHS
VS. HAMILTON COUNTY**

IMAGE WEAKNESSES VS. HAMILTON COUNTY



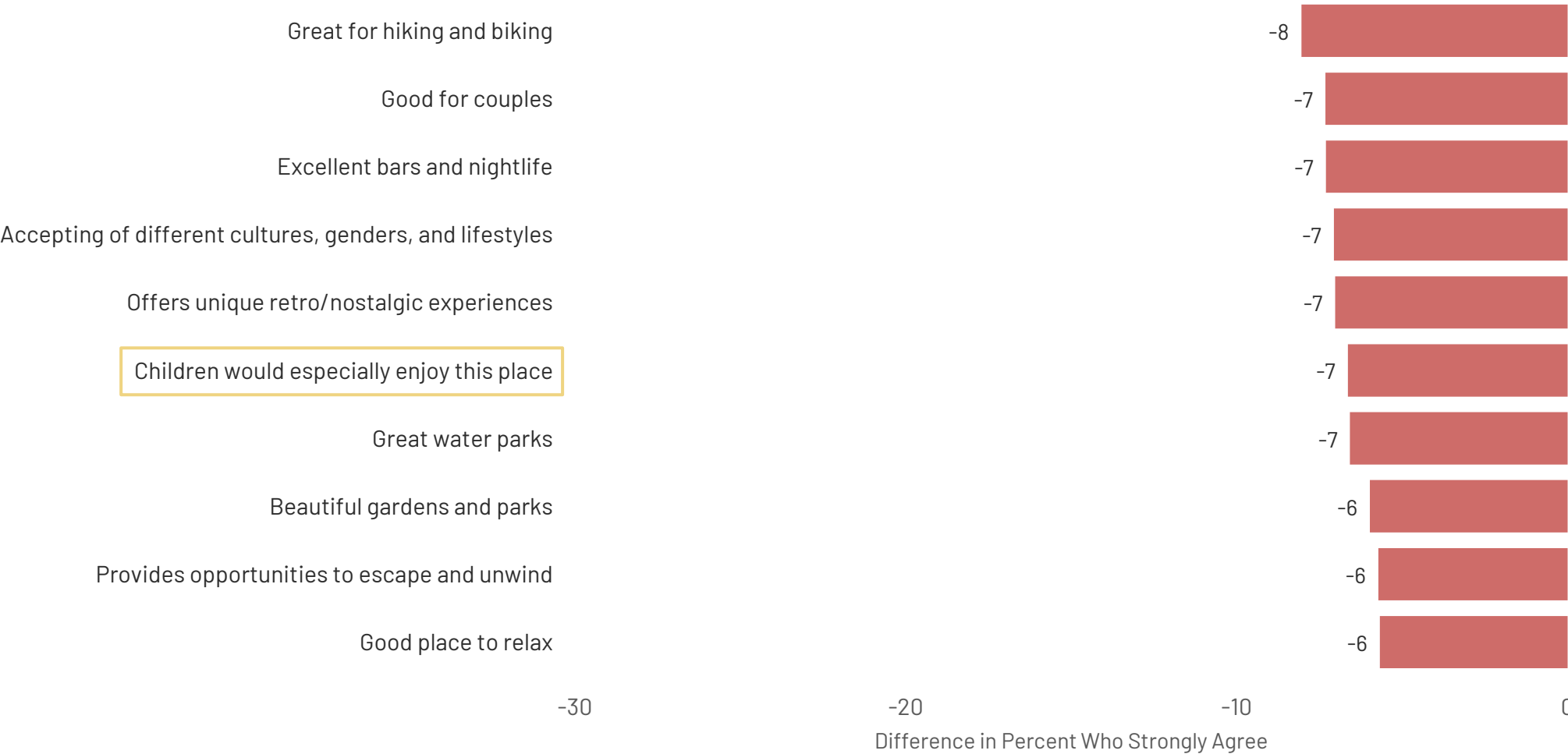
Hot Button

IMAGE WEAKNESSES VS. HAMILTON COUNTY (Cont'd)



Hot Button

IMAGE WEAKNESSES VS. HAMILTON COUNTY (Cont'd)



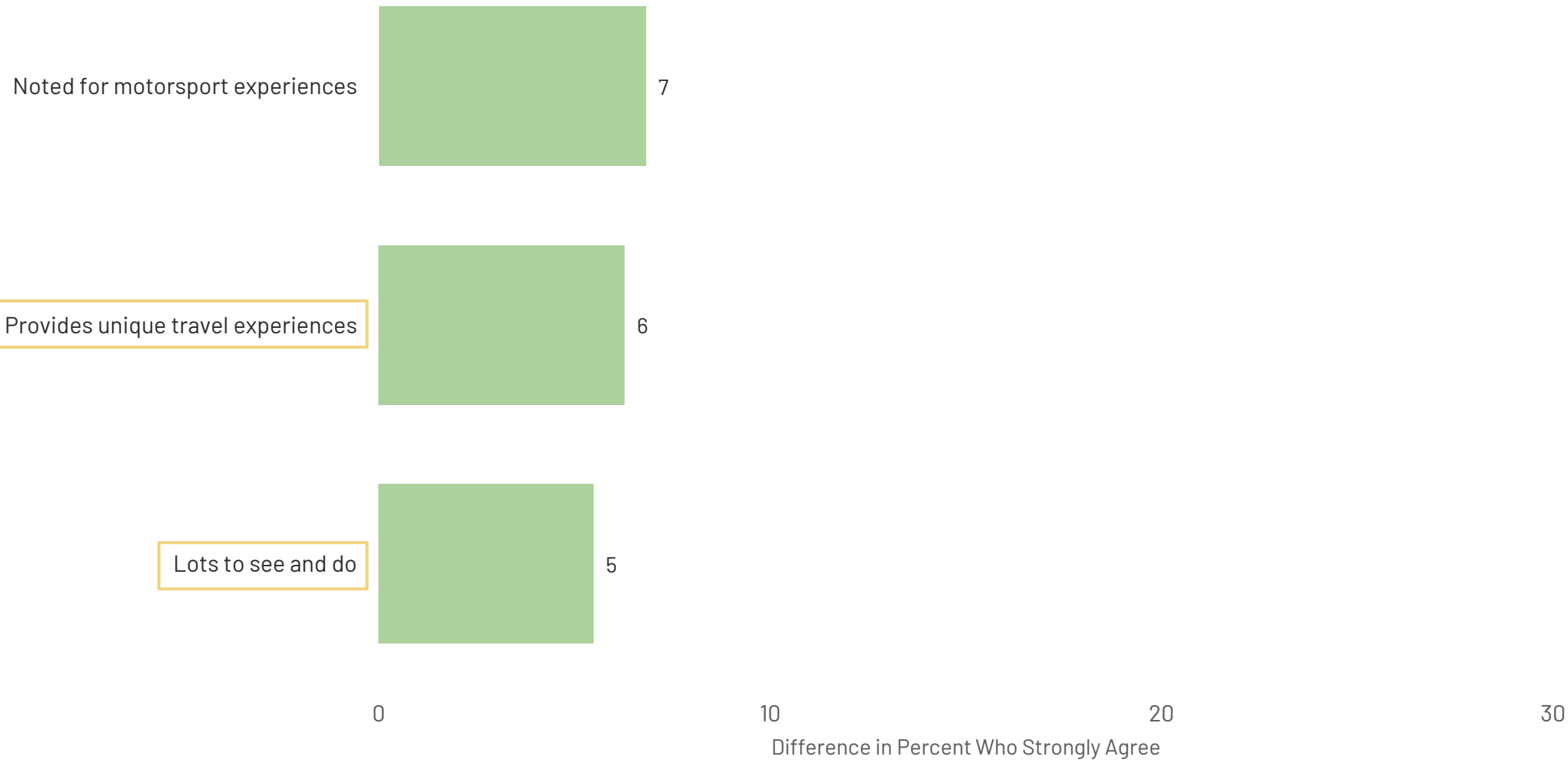
Hot Button



HENDRICKS COUNTY VS. JOHNSON COUNTY: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. JOHNSON COUNTY



Hot Button

IMAGE WEAKNESSES VS. JOHNSON COUNTY

Not too far away to consider for a leisure trip

-7



-30

-20

-10

0

Difference in Percent Who Strongly Agree



HENDRICKS COUNTY VS. SoIN/ SOUTHERN INDIANA: IMAGE STRENGTHS AND WEAKNESSES



IMAGE STRENGTHS VS. SoIN/SOUTHERN INDIANA

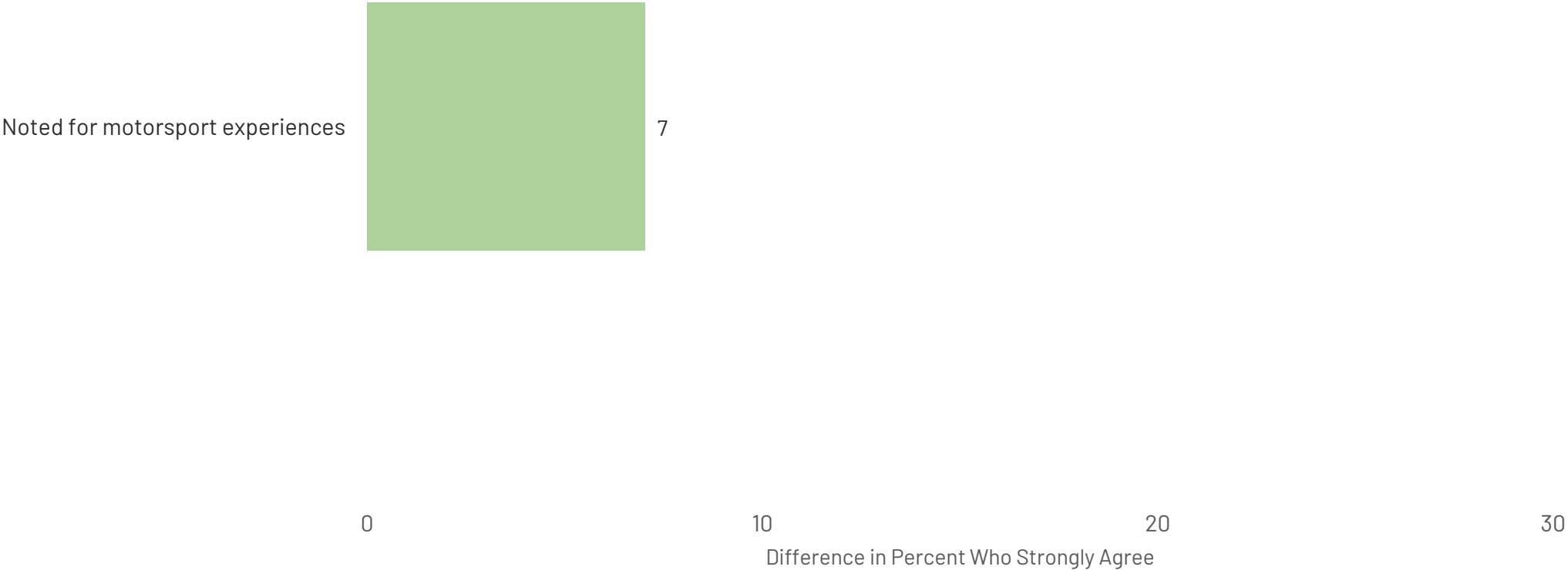
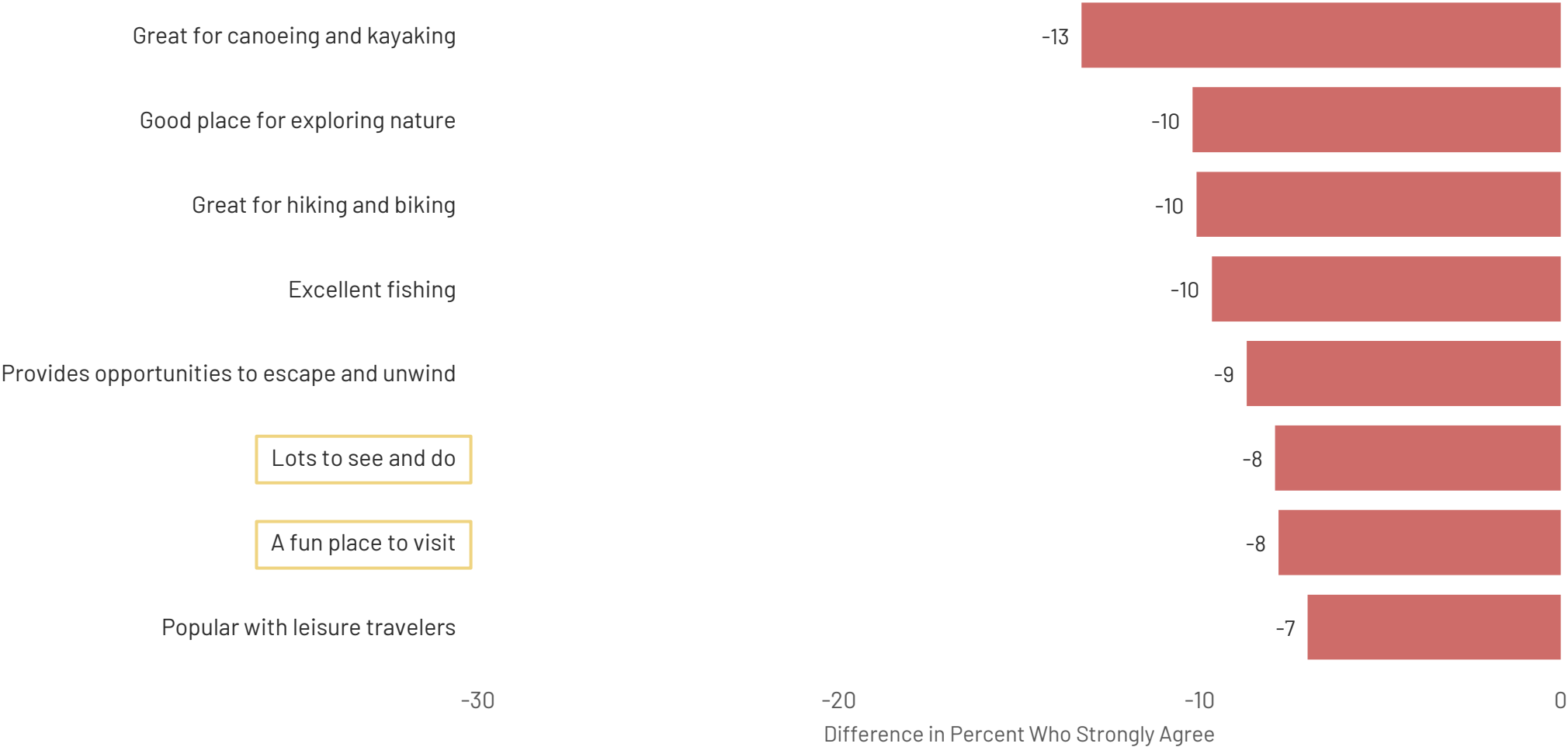
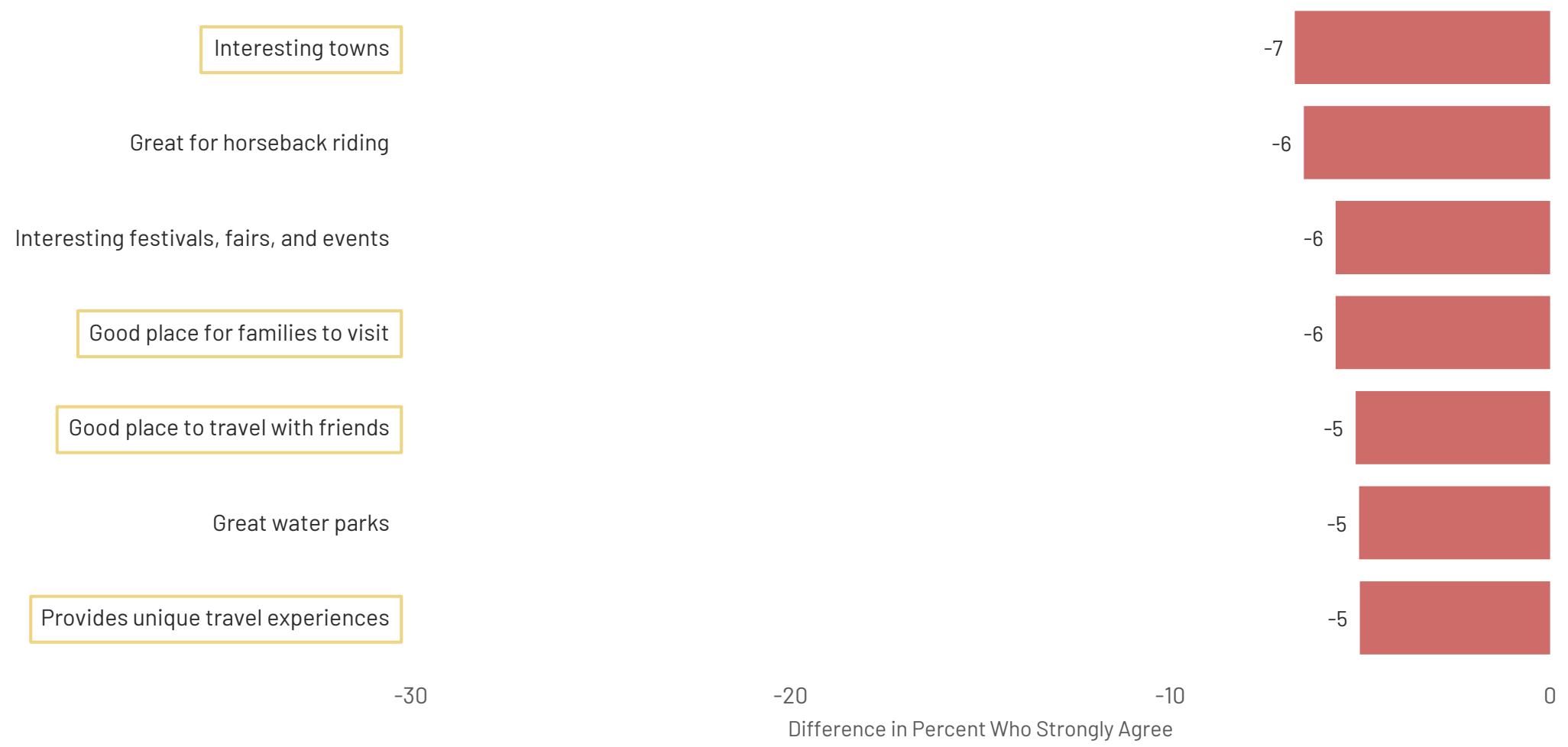


IMAGE WEAKNESSES VS. SoIN/SOUTHERN INDIANA



Hot Button

IMAGE WEAKNESSES VS. SoIN/SOUTHERN INDIANA (Cont'd)



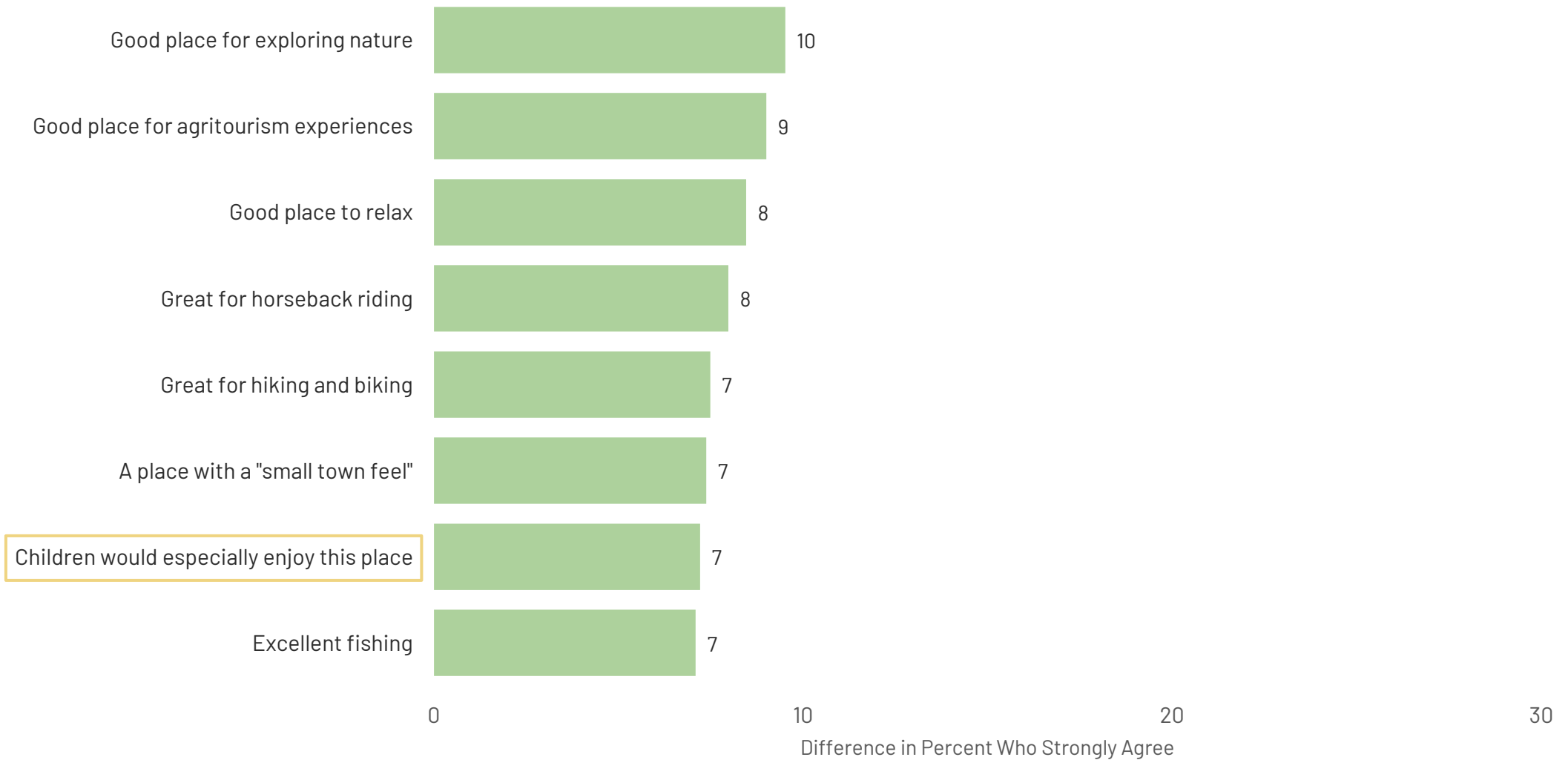
Hot Button



HENDRICKS COUNTY VS. TERRE HAUTE: IMAGE STRENGTHS AND WEAKNESSES



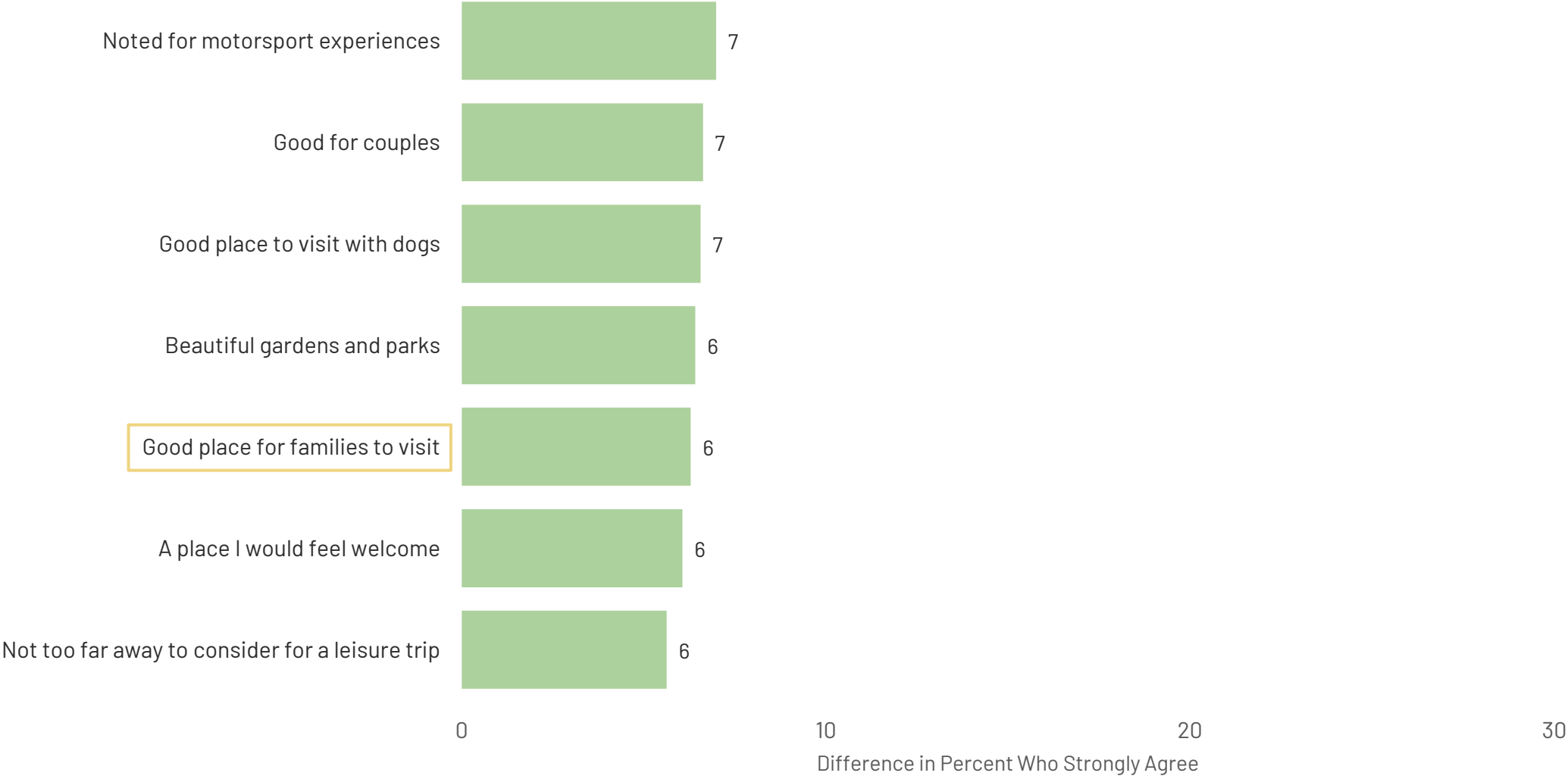
IMAGE STRENGTHS VS. TERRE HAUTE



Hot Button

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE STRENGTHS VS. TERRE HAUTE (Cont'd)



Hot Button

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE WEAKNESSES VS. TERRE HAUTE

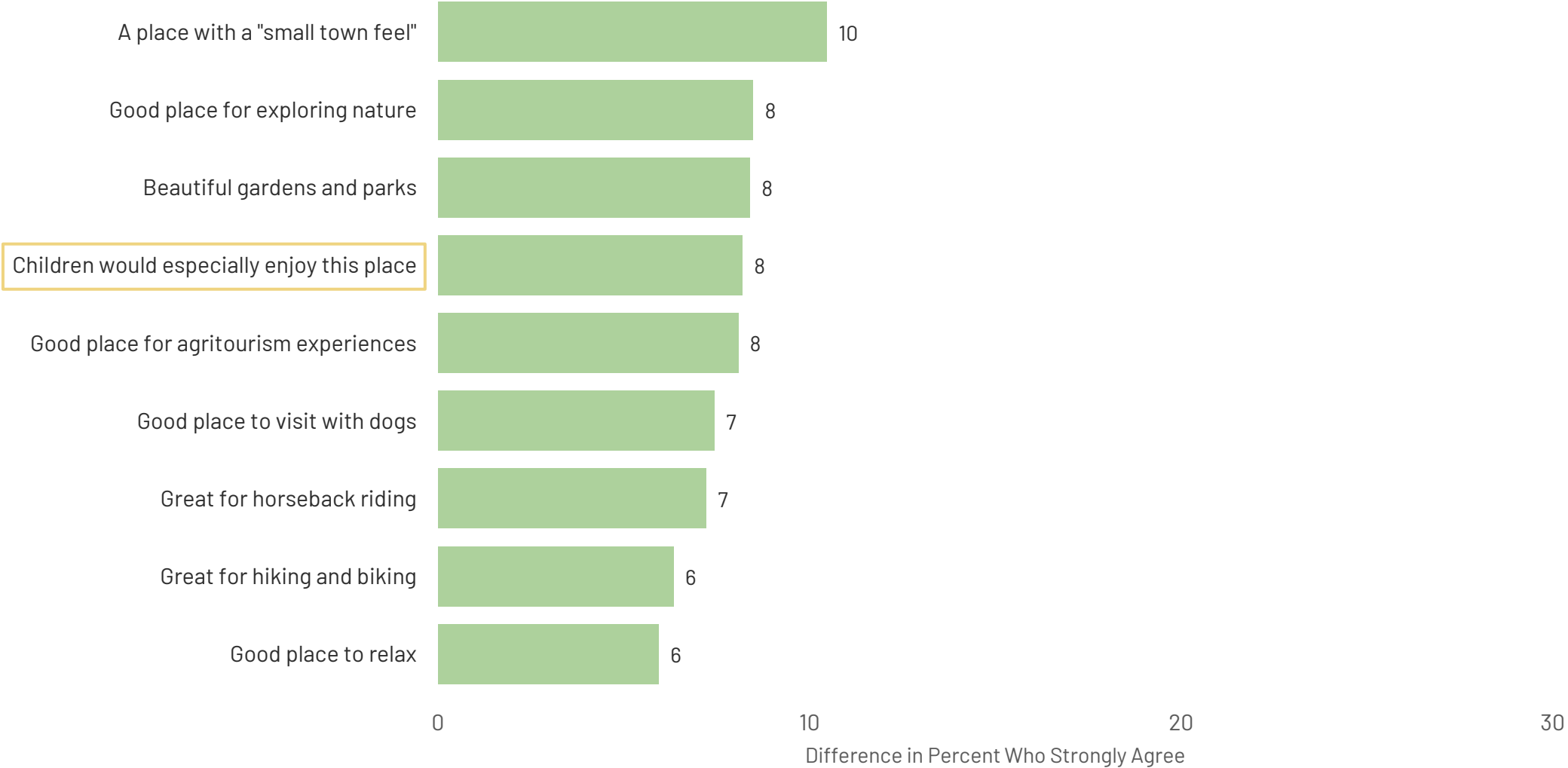




HENDRICKS COUNTY VS. EVANSVILLE: IMAGE STRENGTHS AND WEAKNESSES



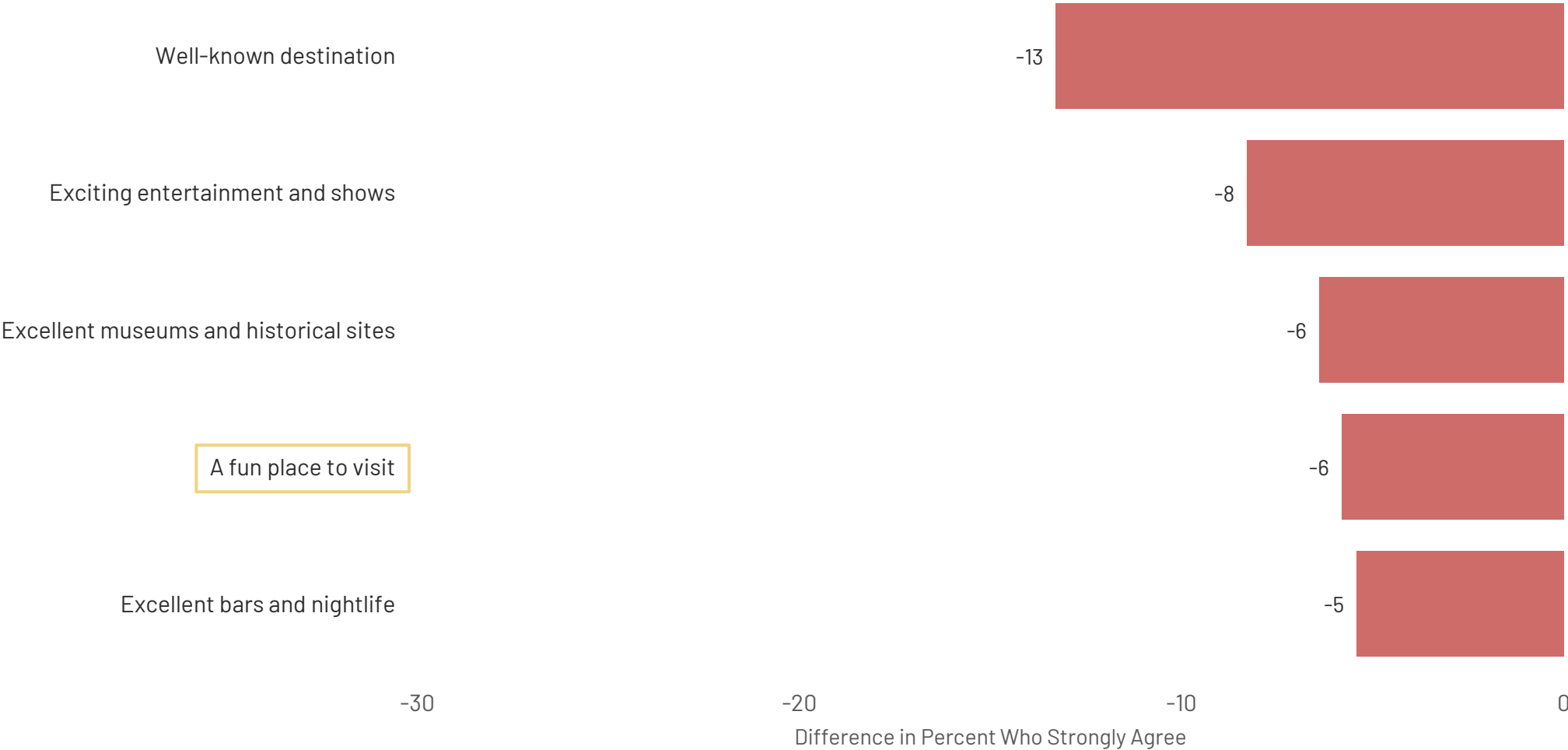
IMAGE STRENGTHS VS. EVANSVILLE



Hot Button

Base: Residents of Hendricks County's Regional Advertising Markets

IMAGE WEAKNESSES VS. EVANSVILLE



Hot Button

Recommendations

Recalled ad awareness counts – The current Hendricks County campaign is having a positive impact on potential visitors, but future campaigns should aim for higher awareness share – at least 60% for in-state markets, and 50% for out-of-state within two years of the rebranding launch. This can be accomplished by a combination of two ways – additional ad investment and a campaign with a more definite brand identity for Hendricks County.

Focus on conversion – Although 48% of potential travelers in Hendricks County were aware of the campaign, only 16% report visiting during the past 12 months. The upcoming rebrand should focus on messaging laser-focused on conversion. Some ideas around this include touting time-sensitive special events, new product offerings, underutilized experiences and offerings repeat visitors may have never tried, and the completeness of the Hendricks County vacation – that travelers will have their expectations met within the destination.

Evaluate product delivery across Hot Buttons – The 10 Hot Buttons are the key leisure travel attributes when travelers in your primary advertising markets are deciding where to go on vacation – will it be Hendricks County or SoIN? Evansville or Hamilton County? However, no destination can be everything to everyone. Longwoods recommends focusing on the Hot Buttons that align with your product and offerings. When we look at the perceptions of recent visitors, they have the same ranking of Hendricks County than those who have never been on 2 Hot Buttons – Visiting this place is a real adventure and Provides unique travel experiences. And the strongest positive impression is with Good place to travel with friends, A fun place to visit, and Lots to see and do. However, this is not just how it is – this is how your current visitors, many of whom are aware of your current advertising, are reacting to engaging with your destination as it is now. You are rebranding and developing new product. Sit with the Hot Buttons and decide which ones reflect your strengths moving forward, and message against those.

Recommendations

Competition is real – Although Hendricks County ranks 4th amongst the competitive set when it comes to the perception of the destination being A place I'd really enjoy visiting, you are only 11 points out of 1st place. That is a very manageable difference. In fact, most of the individual image attributes are relatively the same as your combined competitive set – you have one strength and only four weaknesses, with one of those weaknesses being a hot button – A fun place to visit. A successful, data-driven rebranding will give Hendricks County an edge in preference, something potential travelers will connect with more forcefully than the current position.

Give them what they want – When asked what amenities/activities are important when considering destinations for leisure trips, the majority of potential visitors in your primary advertising markets chose restaurants, outdoor amenities, and events/festivals. While restaurants are only something Visit Hendricks County can support in secondary ways, focusing product development on the outdoor amenities and events/festivals will move the needle on visitation, as long as those opportunities are communicated and marketed to potential visitors.

This is a baseline, not destiny – We need to understand where Hendricks County now to both provide data for the rebranding efforts and understand how perceptions of the destination have moved a few years after the rebrand. Brand Health Assessment is not a one-off process – it's meant to be an accessible, practical way for you to understand what is important to your potential travelers when selecting destinations and how Hendricks County is measuring up in those areas.

VISIT | **HENDRICKS**
C O U N T Y

Longwoods
INTERNATIONAL