



Hendersonville

NORTH CAROLINA

Brand Assets Research

February 2022



insights

Strategic Marketing and Research

Background

The Henderson County TDA has embarked on the development of brand assets that will include print advertising and a refreshed website and travel guide.

Destination marketing organizations must continuously evolve to respond to traveler preferences and changes in the competitive landscape. Understanding consumer reactions to current brand assets can help guide the development of future work. Research to represent the “voice of the traveler” is important in this process because marketers are inherently influenced by their relationships with the destination and the content that is used to promote a place.

Consumers don’t have the same connection, so they experience creative content differently. They are looking for content clues that communicate whether a community is a good place to visit or not.

Websites, travel guides and brand images have the additional objective of engaging the consumer in a way that communicates the right brand messages while also providing content that is both inspirational and informational.

This study addressed questions about how past and potential visitors respond to current brand assets. The research also examined how travelers use destination guides and websites, and the role these resources play in travel planning.

Methodology

- Data was gathered via an online survey that was conducted January 21 through February 5, 2022.
- Respondents were screened to be at least 18 years of age, travelers, and involved in travel decisions.
- The data was cleaned, coded and weighted to represent the traveler populations in the markets that were sampled.
- The quantitative survey was also used to qualify and recruit focus group participants.

Market	Surveys Completed
Raleigh / Charlotte	150
Nashville / Knoxville / Chattanooga	150
South Carolina	150
Atlanta / Jacksonville	150



Destination Appeal & Visitation

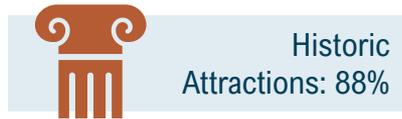
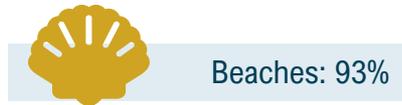
Beach and mountain destinations have similar appeal for target audiences.

Millennials make up a higher proportion of recent visitors to Hendersonville than other generations.

Appeal by Destination Type

- The most popular destination types among travelers includes beaches, mountains and historic sites.
- For people that said that mountains were appealing, Hendersonville scored in the middle for likelihood to visit. Asheville scored at the top.
- Appeal for mountain destinations skews younger, but not considerably.

The Percentage of Travelers that find each Destination Type Appealing



Likelihood to Visit	Score (4-point)
Asheville	3.3
Boone	2.9
Hendersonville	2.7
Highlands	2.7
Brevard /Transylvania County	2.6

Average Appeal Score by Age Group

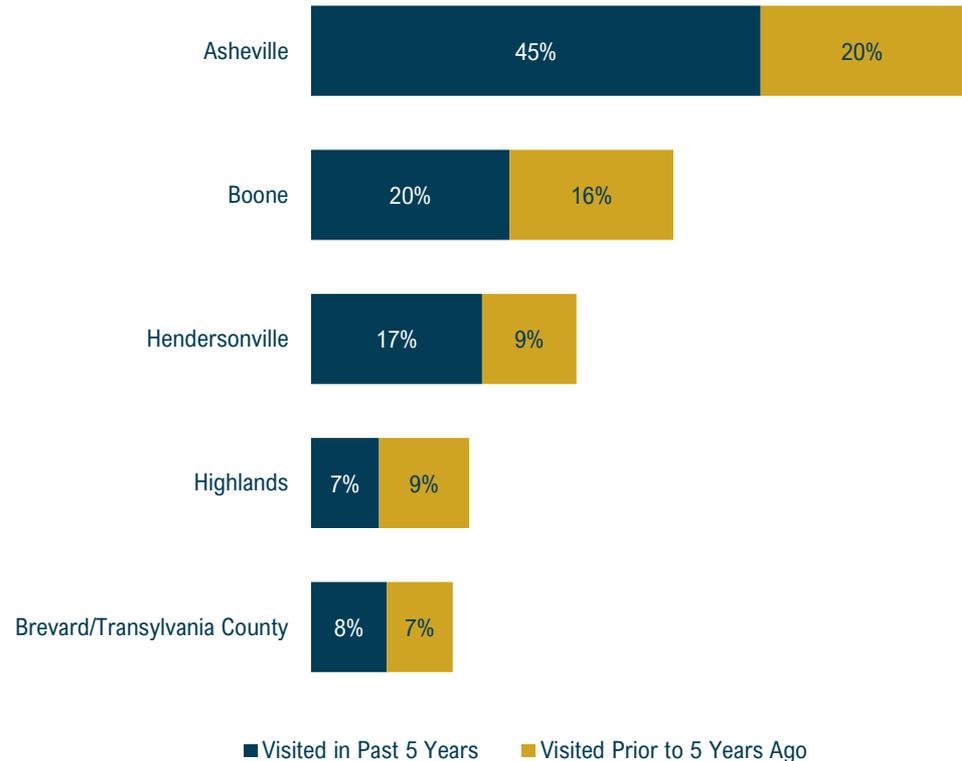
Appeal by Age Group	Millennials	Gen Xers	Baby Boomers
Beaches	3.6	3.6	3.5
Mountains	3.5	3.5	3.4
Historic attractions	3.2	3.3	3.4
Small towns	3.0	3.1	3.2
Theme or amusement parks	3.3	3.2	2.3
Cities	3.2	3.1	2.7

Past and Future Visitation

Respondents were asked if they had ever been to any of the destinations in the competitive set or Hendersonville, and if so, was it in the past 5 years.

- A majority of visitors had been to Asheville. The second most common was Boone and then Hendersonville.

Have you visited any of these places?



Past and Future Visitation

- More than 75% of Gen Xers and Baby Boomers have visited at a destination in the competitive set at least once. This will likely change over time as more Millennials start traveling at higher rates.
- Millennials have a higher proportion of recent visitors to Hendersonville than the other generations. Most likely due to the COVID pandemic, Baby Boomers have lower rates of recent visitation.

Past Visitation by Age Group

Destination	Millennials		Gen Xers		Baby Boomers	
	Prior to 5 Years Ago	Within 5 Years	Prior to 5 Years Ago	Within 5 Years	Prior to 5 Years Ago	Within 5 Years
Asheville	11%	48%	18%	47%	32%	39%
Boone	11%	20%	13%	20%	24%	19%
Hendersonville	6%	20%	7%	16%	15%	15%
Highlands	8%	6%	4%	9%	15%	5%
Brevard/Transylvania County	5%	8%	5%	10%	10%	5%
None of these places	31%		24%		23%	



Demographics & Markets

South Carolina is the top market for Hendersonville. Past and potential visitors differ in many ways.

Demographics

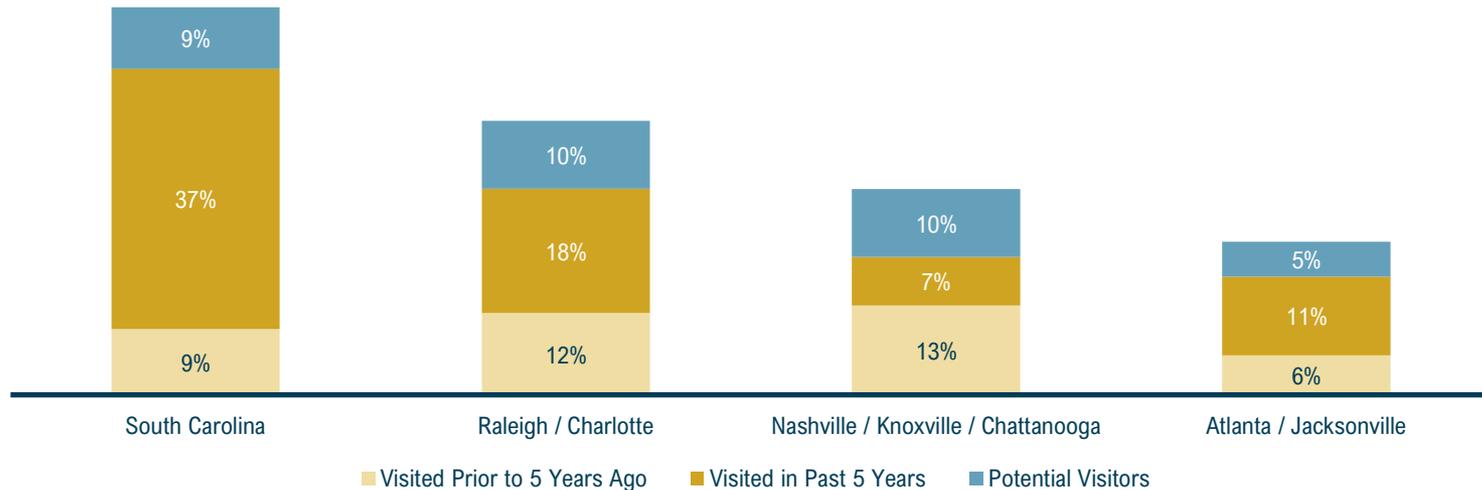
		Past Visitors	Potential Visitors
Age Group	Millennials (18-34)	36%	18%
	Gen Xers (35-54)	35%	30%
	Baby Boomers (55+)	29%	53%
Gender	Male	32%	40%
	Female	68%	60%
	Non-binary	0%	0%
	Prefer not to answer	0%	0%
Marital Status	Married/partnered	68%	63%
	Divorced/separated	6%	22%
	Widowed	2%	4%
	Single/never married	23%	11%
Ethnicity	African-American/Black	11%	4%
	Asian American	6%	0%
	Caucasian	79%	96%
	Hispanic/ Latin American	5%	2%
	Native American	2%	2%
	Other	0%	0%

		Past Visitors	Potential Visitors
Household Size	1 Person	11%	20%
	2 People	37%	43%
	3 People	20%	18%
	4+ People	31%	18%
Children Present	No Children	61%	72%
	1 Child	21%	20%
	2 Children	11%	6%
	3+ Children	7%	2%
Education	High school or less	13%	17%
	Some college/technical school	27%	31%
	College graduate	43%	39%
	Post-graduate degree	17%	13%
Income	Less than \$35,000	14%	25%
	\$35,000 but less than \$50,000	16%	16%
	\$50,000 but less than \$75,000	22%	21%
	\$75,000 but less than \$100,000	22%	19%
	\$100,000 but less than \$150,000	15%	7%
	\$150,000 or more	11%	12%

- Both past and potential visitors are more likely to be married/partnered, have one child and have an income of \$150,000+.
- Past visitors differ in that they are younger, more diverse, mostly families with children and have a higher education.
- Potential visitors are more likely to be older, divorced/separated, white, and less likely to have children.

Past and Potential Visitors by Market

- The top markets for past visitation and potential include **South Carolina** and **Raleigh / Charlotte**. South Carolina in particular has a high percentage of recent visitation, 37%.
- Tennessee and Atlanta/Jacksonville are the two smallest markets. Many of the figures suggest that these markets would require different tactics to reach potential visitors.

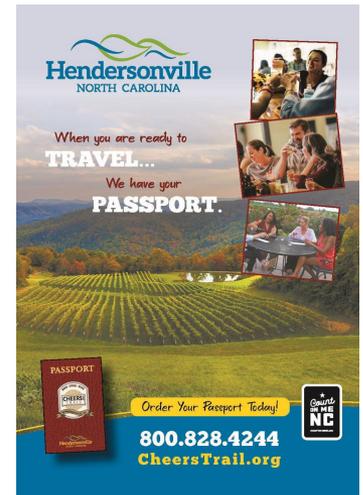


Brand Image & Ad Evaluation

Ad D

USA Travel Guide 2021

- Ad D's word cloud features a mix of responses including wine, boring and farm at the top.
- This suggests that the ad is focused on niche subject matter in terms of appeal.



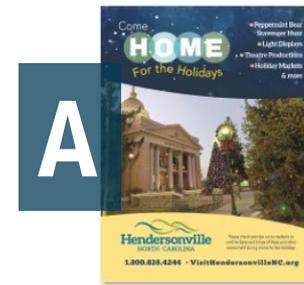
Print Advertising Evaluation

- Ad B did the best job of generating interest. A reason for this might be that the image was strong in both communicating that Hendersonville has mountains and that the ad was presented to people who had favorable associations with them (fun, adventure, beautiful).
- Ad C features a courthouse and text referring to a mountain getaway. This mixed messaging did not perform well. The other ad that featured the courthouse did better because it was focused on the holidays.

How does this ad make you feel about visiting Hendersonville, NC?



■ Makes me less interested in visiting ■ Has no impact ■ Makes me more interested in visiting



Atlanta mag Nov 2021 holiday PR.jpg



Charleston Living May-June 2021.jpg



Food Travel dec 2021 full - PR.jpg

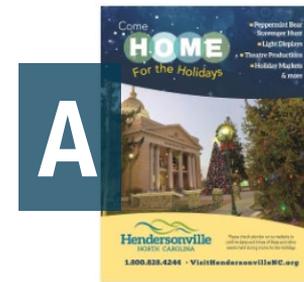


USA travel guide 2021 PR.jpg

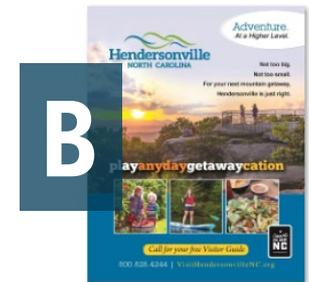
Print Advertising Evaluation

- Ad B performed the best for motivating interest in visiting Hendersonville.
- Ad C with its focus on a government building is the lowest performing, although focus group participants responded favorably to the mountains and skyline in the background.

Statement Agreement by Ad	Ad A	Ad B	Ad C	Ad D
Makes me want to learn more about things to see and do in Hendersonville	58%	74%	37%	45%
Makes me want to visit Hendersonville for a leisure trip	52%	70%	34%	44%
Makes me interested in visiting Hendersonville's tourism website for more information	52%	70%	35%	45%
Shows experiences of interest to me	51%	75%	32%	47%
Enhances my opinion of Hendersonville as a place to take a leisure trip	53%	72%	34%	46%



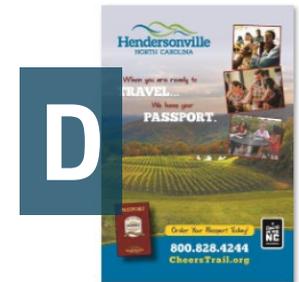
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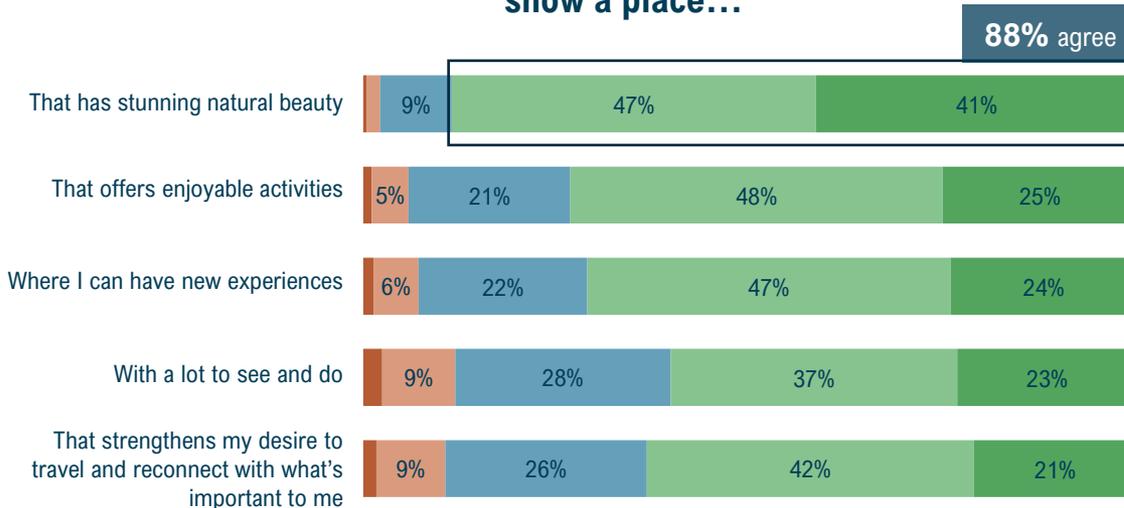


USA travel guide 2021 PR.jpg

Print Advertising Evaluation

- The ads did well showcasing Hendersonville as a place with stunning beauty. This can be attributed to three of the ads showing the mountains in some way through photography.
- The ads score lower for "...with a lot to see and do" – with 60% of respondents agreeing with this statement.

Indicate how much you agree that ALL these ads show a place...



Atlanta mag Nov 2021 holiday PR.jpg

Charleston Living May-June 2021.jpg

Food Travel dec 2021 full - PR.jpg

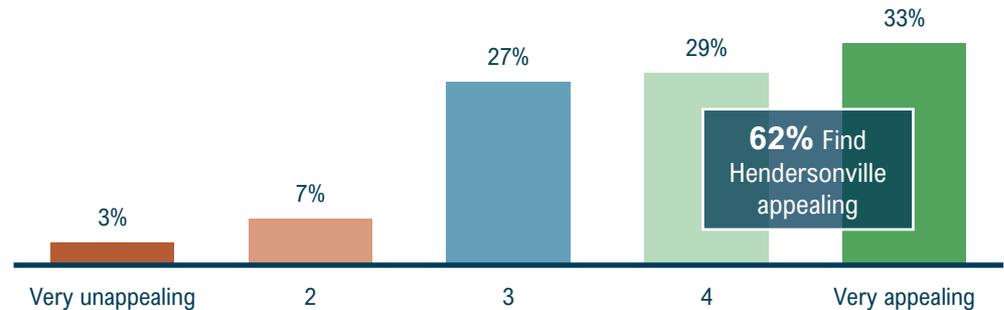
USA travel guide 2021 PR.jpg

When considering all the ads

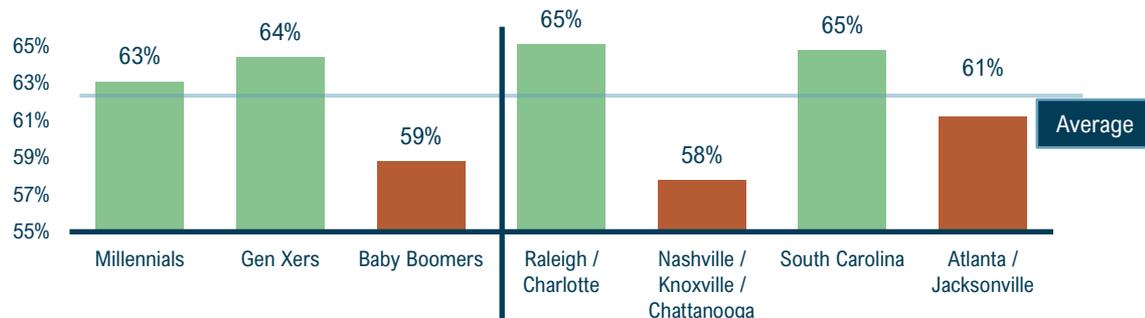
Print Advertising Evaluation

- Hendersonville scores well for appeal, with roughly 2 out of 3 people giving a rating of 4+.
- Ratings were higher among Millennials and Gen Xers, while ratings from Baby Boomers lagged.
- Both Atlanta / Jacksonville and Nashville / Knoxville / Chattanooga markets scored the ad appeal lower than the average.
- The markets in the Carolinas scored the ads much higher. These markets have higher familiarity with Hendersonville and bring more personal knowledge to how they experience the advertising.

Overall, based on the ads you have viewed, how appealing is Hendersonville, NC, as a place to visit for a leisure trip?



Good appeal (4+) percent by age group and market based on the ads



Print Advertising Evaluation

Why do you find Hendersonville appealing/unappealing based on the ads?

"A place that seems interesting, relaxing, and fun to visit."

"Seems small town, boring, not much activity drawing me in."

"It's a beautiful town, with fun activities and opportunities for good food and relaxation."

"It looks boring and it doesn't offer very exciting activities to do. I wasn't at all convinced by the ads that were shown."

"I love the mountains but really like getting to know the area and people by doing exciting things. Only one ad made me really want to go there."

"Haven't heard of Hendersonville being a go to destination. I've lived in NC awhile and haven't heard of it."

"Mobility issues and unable to do many outdoor activities."

"It looks boring and it doesn't offer very exciting activities to do. I wasn't at all convinced by the ads that were shown."

"Does not seem to have anything special going on. Shows some nature, but lots of places have mountains and geography."

"There's so many mountains so much land to just engage it with."

"The ads looked... like a high school kid made them."

"The focus on the courthouse is curious to me, the only time most people go to a courthouse is for something they'd rather not have happen to them!"

Image Evaluation

Travelers were asked to view these images and rate them on a three-point scale where 1 meant “makes me less interested in visiting,” 2 meant “had no impact” and 3 meant “makes me more interested in visiting.”



Apple Cannon Family.jpg



ApplePickinFamily5.jpg



Bearfootin' Bears 1777 - CREDIT Todd Bush.jpg



Bearallow CoupleDog - Todd Bush.jpg



Downtown.jpg



Dupont Triple Falls - CREDIT Bill Russ.jpg



dupont-high-falls.jpg



flatrockplayhouse.jpg



gem-mining-boy-mom.jpg



HorseShoeFarmSpa.jpg



JeterMountainCider2.jpg



JeterMountainFarmAriel3.jpg



jump-off-rock.jpg



MainStreetSouthAriel - Todd Bush copy.jpg



Marked Tree Vineyard_CREDIT Todd Bush.jpg



PumpkinWagonFamily.jpg



Roof Top Cocktails Courthouse Todd Bush.jpg



Sanctuary Brewing 0654 - CREDIT Bill Russ.jpg



sandburg-home4.jpg



Sierra Nevada Brewery.jpg



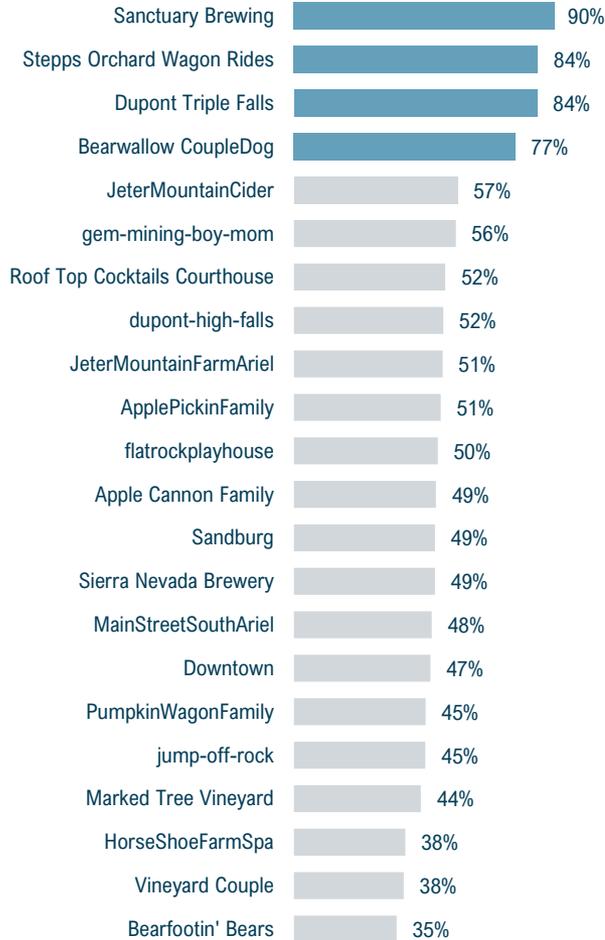
Steps Orchard Wagon Rides.jpg



Vineyard Couple4.jpg

Images

The images highlighted to the right scored the highest for “**makes me more interest in visiting.**”



Apple Cannon Family.jpg



ApplePickinFamily5.jpg



Bearfootin' Bears 1777 - CREDIT Todd Bush.jpg



Bearwallow CoupleDog - Todd Bush.jpg



Downtown.jpg



Dupont Triple Falls - CREDIT Bill Russ.jpg



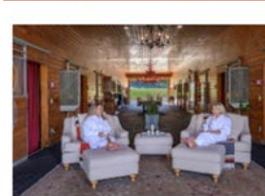
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sandburg-home4.jpg



Sierra Nevada Brewery.jpg



Stepps Orchard Wagon Rides.jpg



Vineyard Couple4.jpg

Images

Photo ranking by potential visitors is similar to the average visitor. The images with the biggest differences between potential* and past visitors are highlighted in the table below.

	Past Visitors	Potential Visitors	Difference
Sanctuary Brewing	93%	88%	5%
Stepps Orchard Wagon Rides	92%	87%	6%
Dupont Triple Falls	87%	95%	-8%
Bearallow Couple Dog	86%	87%	-1%
gem-mining-boy-mom	63%	69%	-6%
Jeter Mountain Cider	66%	64%	2%
Roof Top Cocktails Courthouse	68%	57%	11%
flatrockplayhouse	63%	45%	17%
Apple Pickin Family	68%	53%	15%
dupont-high-falls	58%	48%	9%
Sandburg	62%	56%	6%
Jeter Mountain Farm Ariel	64%	55%	10%
Apple Cannon Family	58%	45%	12%
Main Street South Ariel	60%	43%	17%
Downtown	58%	47%	11%
Sierra Nevada Brewery	52%	44%	8%
jump-off-rock	54%	55%	-1%
Marked Tree Vineyard	59%	49%	10%
Pumpkin Wagon Family	59%	43%	15%
Horse Shoe Farm Spa	46%	48%	-2%
Vineyard Couple	46%	36%	11%
Bearfootin' Bears	43%	33%	10%



Apple Cannon Family.jpg



ApplePickinFamily5.jpg



Bearfootin' Bears 1777 - CREDIT Todd Bush.jpg



Bearallow CoupleDog - Todd Bush.jpg



Downtown.jpg



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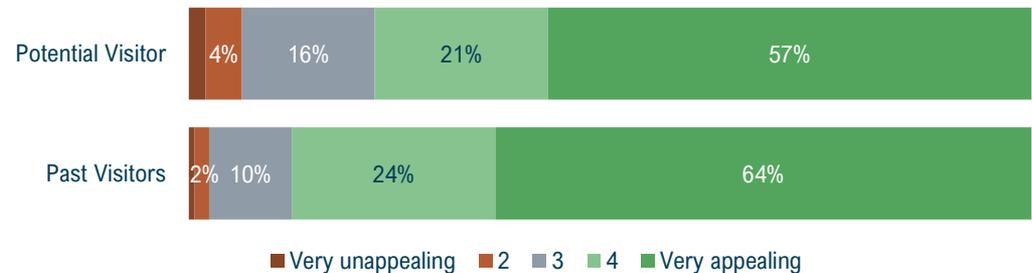
Vineyard Couple4.jpg

**potential visitors are defined as respondents that have not previously visited Hendersonville but indicated that they are likely to visit in the future.*

Images & Appeal

- The images do a good job of showcasing Hendersonville as an appealing place. Over half of both potential and past visitors rated Hendersonville as a very appealing place to visit, based on the images.
- It is not surprising that past visitors have even more favorable reactions after being exposed to the photography.

Overall, based on the images you have viewed, how appealing is Hendersonville, NC, as a place to visit for a leisure trip?



Considering all of the images you have viewed, how likely are you to visit Hendersonville, NC?

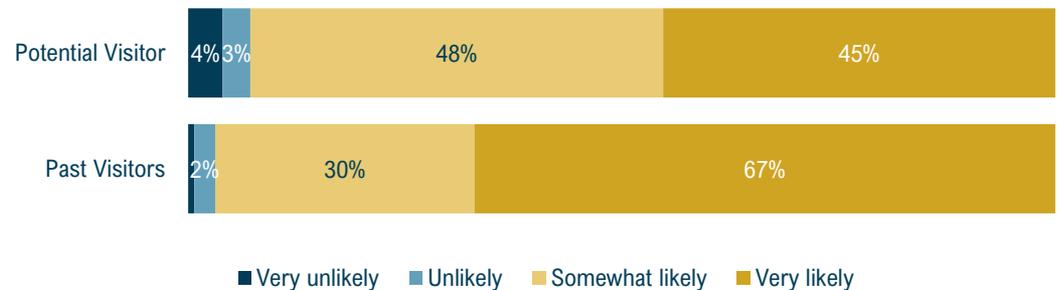


Image Makes Me More Interested

- The images listed below are organized by what generates the most interest in visiting Hendersonville by groups with the biggest potential lift.
- While there are subtle differences between groups, all of the top performing images are also the highest performers for the other groups. This suggests that using photography that generates interest among the respondents as a whole will also affect potential visitors in a similar way.



Sanctuary Brewing 0654 - CREDIT Bill Russ.jpg



Stepps Orchard Wagon Rides.jpg



Dupont Triple Falls - CREDIT Bill Russ.jpg



Bearwallow CoupleDog - Todd Bush.jpg



JeterMountainCider2.ipa



gem-mining-boy-mom.ipa

Focus Groups

Focus Group Insights

The Hendersonville website homepage performed well.

- The homepage was the best performing destination asset shown to the focus group. The reasons for this include the variety of activities, the video (although many mentioned the video should loop) and the navigation. Ultimately, visitors could find what they needed and there seemed to be enough going on to warrant a trip.

Attract more potential visitors with photography.

- The participants wanted more photography of Hendersonville for both the travel guide and the website. There were a few people who had visited the area before. They remarked that the beauty of the place was not matched by the photography of the destination assets. Additionally, when comparing the photos of Brevard and Hendersonville, many people preferred Hendersonville more. This suggests that the photos are not underperforming; rather the potential visitors have a larger appetite for good photography.

The design of the destination assets has narrow appeal.

- The participants described the targeted visitor for the website, the travel guide and the ads to be families interested in small towns. This suggests a need enhance the design of the destination assets to emphasize the scenic beauty of the area, outdoor recreation, and a broader array of activities.
- The most positive participants were familiar with Hendersonville and brought destination awareness to their perceptions of the materials. They were less impactful for potential visitors.

Travel Guide

Although many participants preferred the smaller format, the size of the guide is secondary to the content.

- *Brochure size*: Easy to transport and reference while on the trip. The local visitors preferred the smaller size.
- *Magazine size*: Larger size allows for more information, better for planning but less likely to be used while on the trip. The larger size allows for more pictures.

Do you use your phone or computer when also using the travel guide?

- The participants prefer to have all the information in the guide. There are places in the mountainous areas where you lose cell service. It is helpful to refer to the printed guide in these places.

Travel Guide Stories

- The majority of the participants liked seeing stories in the travel guides. One of the participants pointed out that for her to read the story, she had to be compelled by good photography first.

Printed Travel Guide Sizes



Brochure
(preferred size)



Magazine

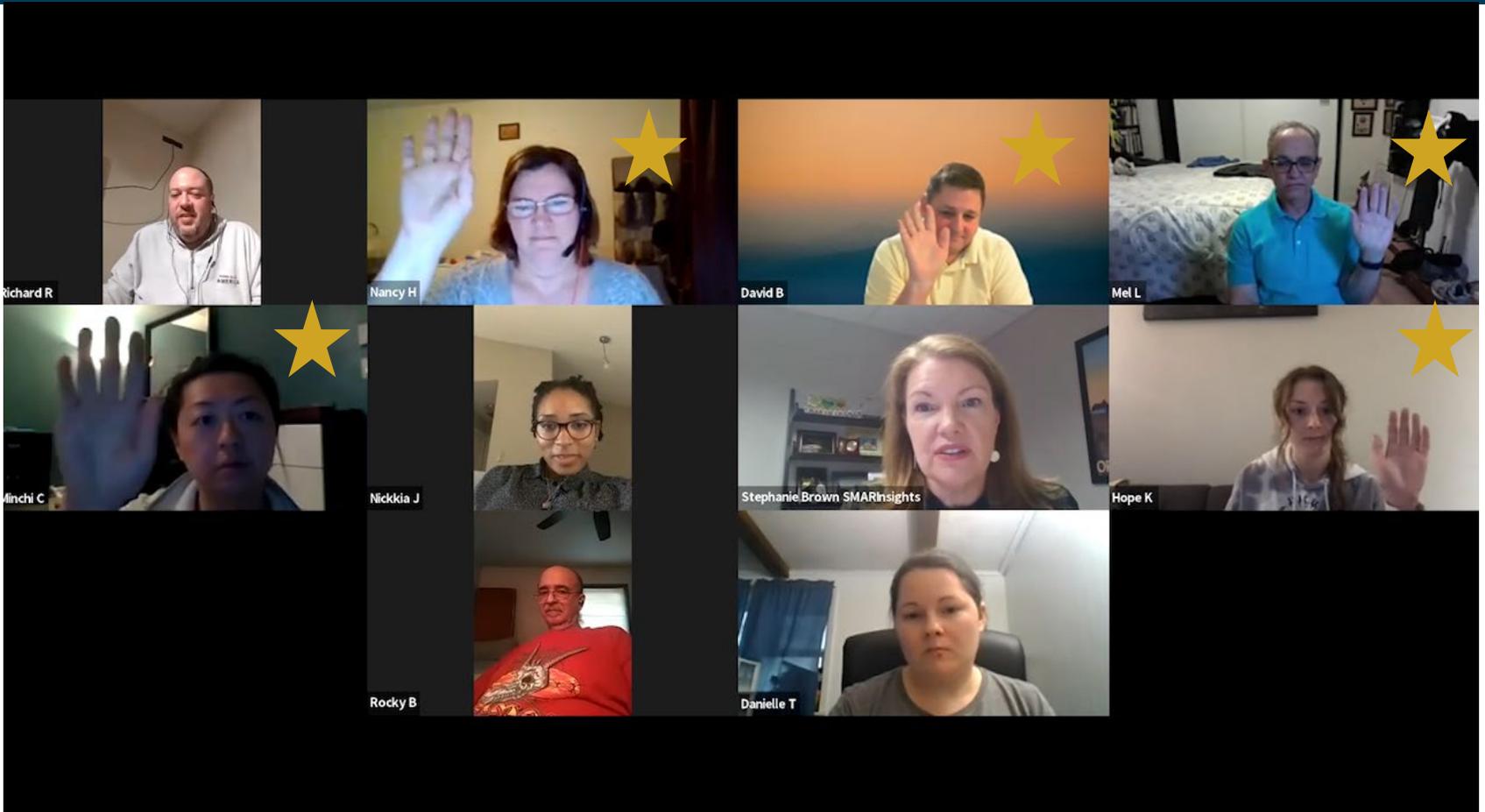
Travel Guide Size

5 of the 8 participants in Group B said they prefer the smaller travel guide size.



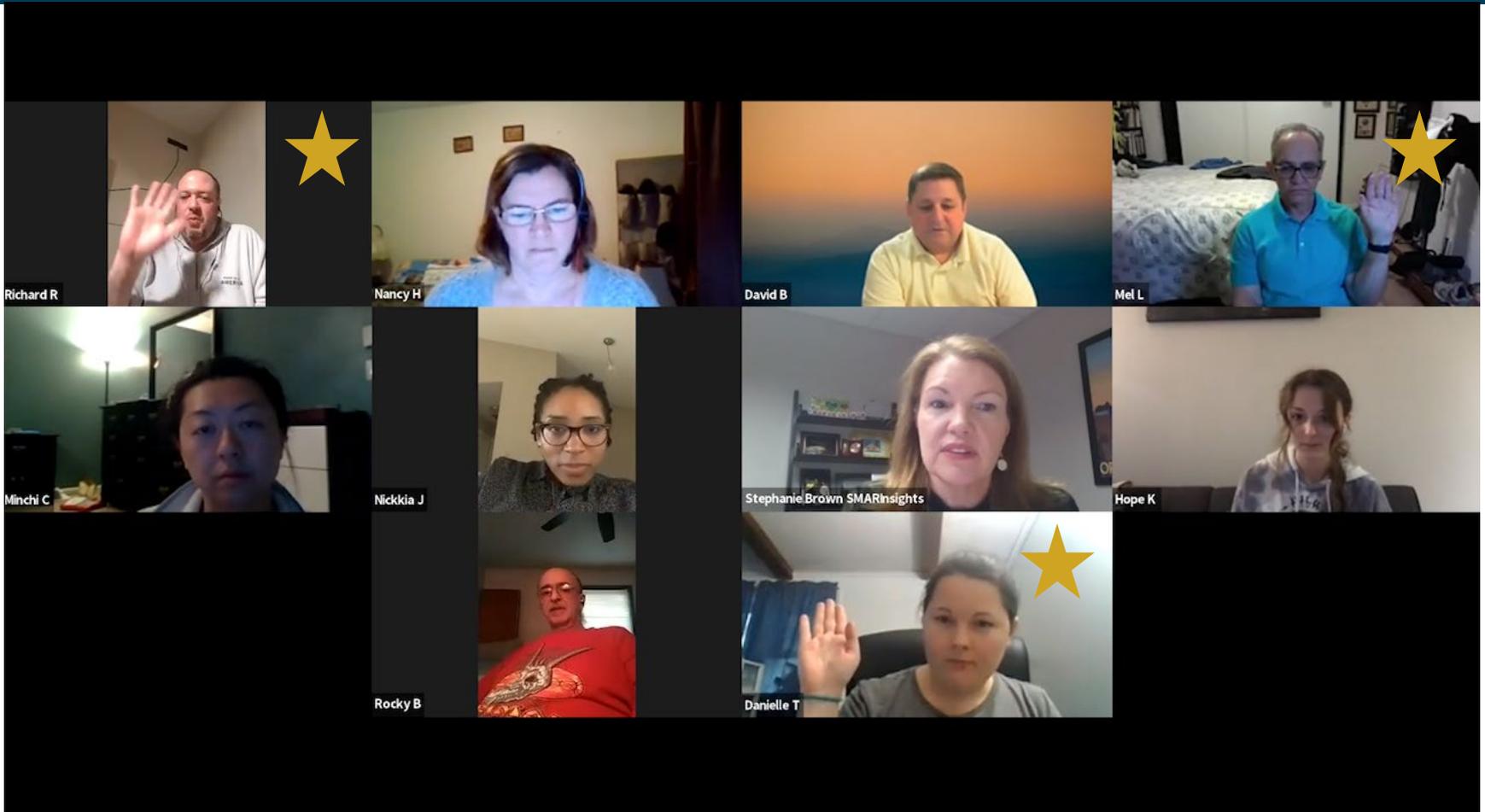
Travel Guides Requests

5 of the 9 participants in Group A said they would request the guide prior to taking their trip.



Travel Guide Used During Trip

3 of the 9 participants in Group A said they would use the travel guide to select things to do during their trip.



Travel Guide Comparison

The Brevard and Jackson County travel guides performed well because of their design, organization of helpful information and destination photography.

Brevard

- The Brevard design was rated the best overall. This gave the impression that the destination is classy, relaxed but also authentic.
- Many of the participants who live in cities said that their impression was that Brevard is an escape from the city life, with many outdoor things to do.
- The majority of Group B liked the Brevard guide the most. Reasons for this include the design/layout, the pictures and the organization of the information.

Jackson County

- The Jackson County guide's cover design appealed to 6 participants, which ties the cover for most popular.
- There is a focus on the mom-and-pop shops, and locally owned businesses.
- The reaction to the position of the ads was unfavorable, especially having an ad on the opening spread.
- The pricing and pet-friendly indicators on listing grids were liked by the planners and people with pets.
- The pull-out map was popular, particularly with the older visitors that identified themselves as extensive planners.

Boone

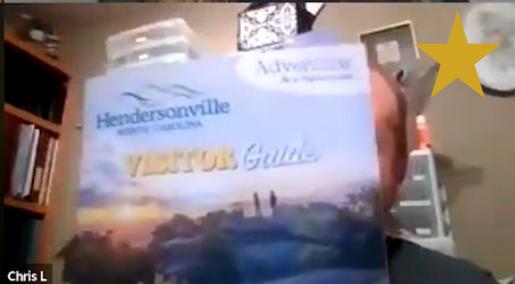
- The Boone guide's cover was the favorite of 4 participants, making it the third most appealing cover.
- The color-coding of the sections made the guide easier to use and navigate.
- The guide was considered too word-heavy. More pictures would have been preferred.
- The average temperature table was a helpful addition to the planners of Group A.

Most Appealing Travel Guide Cover

Votes for Most Appealing Cover



Most Appealing Place Based on the Travel Guide



Hendersonville Travel Guide

The Hendersonville travel guide cover lacked appeal for most of the focus group participants. This is a missed opportunity to engage potential visitors with stunning photography of the destination.

There is a connection between the perceived value of the travel guide and the perception of trip duration one might expect when visiting the area. In this case, the guide was considered low-budget thus Hendersonville must be a daytrip, budget-friendly place.

- The cover was not as appealing as the other guides that were evaluated. The size and larger picture were appealing to the few participants who liked the cover.
- When comparing photography between Brevard (the highest-rated guide) and Hendersonville, the focus groups rated the Hendersonville photos as better. However, the photography was described as randomly placed within the organization of the travel guide.
- When asked what you would change, picture quality/frequency and additional use of color were brought up. Many of the participants said the guide was too word-heavy and lacking photography.
- There were sections of the guide that were organized well, particularly the listings and the detailed camp information.
- The Hendersonville guide opening pages do a good job of introducing the area and what's nearby, although it is expected that that information be placed further back in the guide.
- When asked to describe the printed travel guide, the participant responses included: monotone, boring, not the prettiest and low-budget.
- When asked about the impression the guide gave of Hendersonville, many of the participants in Group A said it is a **family-friendly place** for **outdoorsy-type people**. It was additionally described as **small-town** and **low-budget** by Group B.
- In terms of trip duration, many people stated that Hendersonville appears to be a **daytrip destination**. One person said they would take an overnight but only because of the outdoors options nearby.

Budget Brand



Website Comparison

The focus group participants preferred the websites with inspirational videos/photography, and easy to use navigation. Having a well-organized and engaging homepage added to the destinations' appeal.

ExploreBoone.com

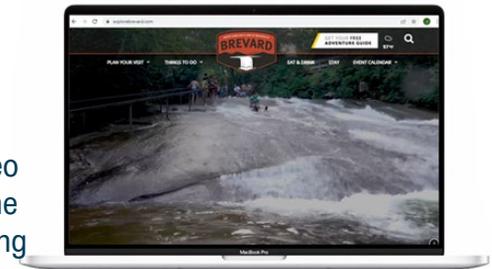
- The homepage sells the idea that there are many things to do in Boone. Some participants perceived the homepage as being cluttered because of all of the things listed.
- Currently, there are many wintery photos and attractions on the homepage. For a participant from Georgia, this is too much cold for her. Seasonality is certainly something to consider with different markets.
- The icons on the listings were preferred.

ExploreBrevard.com

- Most polished website among the group. This website received very high ratings from both groups. There was general agreement that the Explore Brevard website is the most professional of the group.
- One person scored the website a 3, because there were too many fast-food restaurants suggesting that there was a lack of local options.
- The participant who scored the website a 5 stated that it was her favorite. For her the video clips were informative, the small pictures in the navigation were helpful and it had a cozy feeling overall.

DiscoverJacksonNC.com

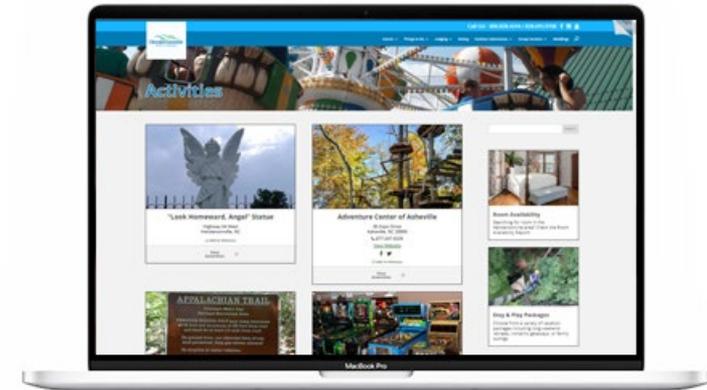
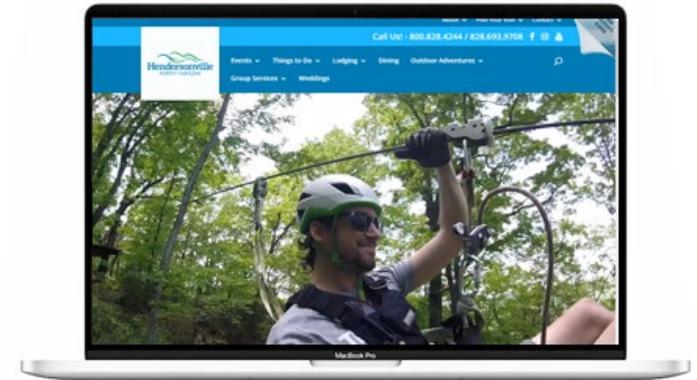
- The video on the homepage was appealing.
- The Jackson County travel guide had better appeal than the website.



Hendersonville Website

The current website rates high for ease of navigation but does little to inspire visitation. There is an opportunity to inspire potential visitors with content and compelling photography.

- The organization of the website is its biggest asset. Familiar participants need less inspiration and use the website more for reference.
 - Group B participants (with more familiarity) rated the website higher than Group A, although no one gave the website a 5.
 - Potential visitors need more inspiration than the current website offers.
 - When asked if the website showcases the stunning natural beauty of Hendersonville, the consensus was no, the website does not.
 - The website was characterized as simple, text-heavy, not eye-catching by a majority participants.
- The video on the homepage is very popular. However, everyone wanted it to keep playing or loop, noting that it stops at a weird point.
- The Hendersonville website is projecting a family-focused brand.
- It would be helpful for visitors to see the top things to do. The participants want to be directed to the best things about the destination.



Hendersonville Sections

While the homepage performed well, the interior pages miss the opportunity to connect with potential visitors through overview copy and photography for each of the landing pages.

Outdoor Section

- The pictures on the listings are generally appealing; however, participants noted that pictures were not a great representation of all the listings.
- The organization of the listings prior to using the search functionality came across as being either too much or having a strange order. The website appears to use an alphabetical order, which does not pull the most intriguing or highest performing listings to the top.
- There are not enough pictures to sell Hendersonville as a place with stunning natural beauty – and whatever listing is at the top of the alphabet becomes the establishing imagery for the page.

Lodging Section

- The pictures on the listings help select potential hotels.
- This section did not seem to function like the other landing pages.

Dinning Section

- Participants wanted more emphasis on independent restaurants.

Overview Copy

- The people who were interested in the destination wanted overview copy. From their perspective, overview copy is more important than the individual listings. The detail in the copy helps with deep-diving on specific subject matter.

Importance of Copy



Print Ad Comparison

The ad featuring the mountain as the primary photo received the most positive feedback. The rest of the print ads were perceived as mediocre or low-budget. The ads did not effectively communicate what there is to see and do in the Hendersonville area.

Courthouse Aerial Ad

- The ad was prettier than most of the photography on the website and in the travel guide according to Group B.
- Gives a sense of downtown Hendersonville, but not a good sense of things to do.
- The mountain in the background is what the participants wanted to see. The focus on a government building does not communicate attributes that motivate travel.

Mountain View, Multi-Image Ad

- The pictures in this ad were popular with everyone. In particular, the mountain photo made Hendersonville appealing to the focus group.
- Described as simplistic and showing a variety of things to do.

Winery Ad

- The ad successfully communicated that Hendersonville is a place to visit a winery, although this appealed to a smaller audience.

Holiday Ad (with Courthouse in the background)

- Some of the participants liked the ad and it made them want to visit. The courthouse photo should be swapped with one of a local shop, keeping the festive theme.

Impressions based on all the ads

- The ads were characterized as **low-budget** but this was not a negative for one participant. The low-budget nature of the ad is interpreted as an affordable place to visit.
- The participants indicated that the ads were intended for regional families looking for a place to relax or explore the outdoors for the day.
- A participant from Group B summed up her impression of the ads by saying “**there is something for everyone *but* not everyone is going to find it.**”

Overall Appeal of the Print Ads



Did the ads make you more interested in visiting Hendersonville?

2 of the 9 participants in Group A said they are more interested in visiting Hendersonville after seeing the ads.





Travel Guide Perceptions

More than a third of visitors use printed guides.

Travel guides and destination websites play a key role throughout the travel planning process.

Guides need to serve up information efficiently and make organizational sense.

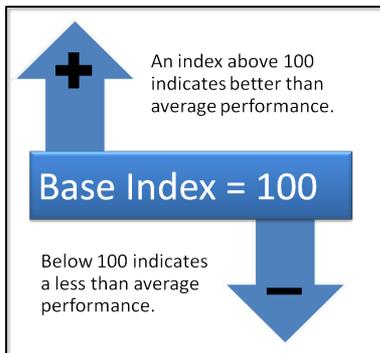
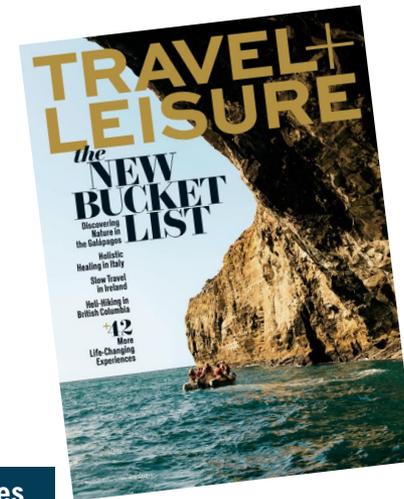
Travel Planning Resources Usage

- The table to the right displays the travel planning resources that past and potential visitors use.
- The top resources used include hotel websites, booking websites, recommendations from friends/family and destination websites.
- The biggest differences in the types of resources used when comparing past to potential visitors include (*indicated on the chart*):
 - Hotel websites
 - Other accommodation websites
 - Airline websites
 - YouTube
 - Magazines (*resource is used more by potential than past visitors*)
- Notice that many of these resources are used for booking things. Past visitors by their very nature have visited a place, which would explain the difference.
- Past visitors use 27% more planning resources than potential visitors.

Resource (% Used)	Past Visitor	Potential Visitor
Hotel websites	56%	43%
Booking websites (Kayak, Trivago, Hotels.com)	55%	45%
Recommendations from family/friends	53%	49%
Destination websites	47%	42%
Online travel agents (Expedia, Travelocity)	47%	39%
Other accommodation websites (Airbnb, VRBO, HomeAway)	42%	27%
Airline websites	37%	23%
YouTube	32%	14%
Printed travel guides or publications from the destination	24%	25%
Facebook	23%	19%
Instagram	23%	14%
Blogs (not those of people you know personally)	17%	11%
Television or other video ads	17%	17%
Magazines	14%	31%
Pinterest	14%	8%
Twitter	13%	3%
Snapchat	11%	3%
None of these	2%	3%

YouTube and Magazine Usage by Age and Market

- On the previous page, YouTube and magazines were identified as having large differences in use between past and potential visitors.
- To better understand why this might be, we have created an index for usage among age groups and markets.
- YouTube** was utilized more by **past visitors**. In the chart below, Millennials and the South Carolina market use YouTube much more than the other groups.
- Magazines** were utilized more by **potential visitors**. Baby Boomers and the Carolinian markets had the higher indexes.
- Both resources are used during as trip inspiration and for comparing destinations.



Index of Usage	YouTube	Magazines
Millennials	145	82
Gen Xers	112	97
Baby Boomers	44	120
Raleigh/Charlotte	78	111
Nashville/Knoxville/Chattanooga	105	106
South Carolina	131	113
Atlanta/Jacksonville	96	81

Planning Resource Usage by Planning Stage

The table to the right shows resource usage per planning stage. The resources are ordered by the percent of respondents that said they used that resource for 4+ stages.

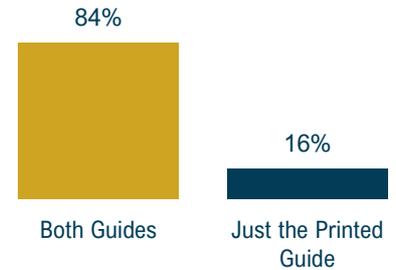
- Blogs and recommendations from family/friends were used most throughout the planning process.
- Instagram, Snapchat, magazines, Facebook, Pinterest, YouTube and TV/video ads are all very visual and more likely to be used during the inspiration stage of the process.
- Destination websites and travel guides serve similar purposes. Both are important for inspiration, comparing destinations and itinerary building.
- Printed travel guides are the most utilized resource for finding things to do when the visitor is in the destination.

	Inspiration	Comparing Places to Visit	Selecting Hotels/Transportation	Itinerary Building	Booking Hotels/Transportation	Find Things to Do During Trip	% Used During 1 Stage	% Used 4+ Stages
Blogs	69%	59%	40%	60%	22%	34%	25%	25%
Recommendations from family and friends	62%	64%	53%	59%	23%	35%	22%	24%
Online travel agents such as Expedia and Travelocity	32%	47%	64%	36%	70%	19%	24%	21%
Other accommodation websites such as Airbnb, VRBO or HomeAway	38%	49%	61%	33%	56%	16%	29%	21%
Booking websites such as Kayak, Trivago, Hotels.com, etc.	30%	48%	65%	27%	62%	16%	32%	20%
Destination websites	58%	64%	34%	53%	24%	39%	28%	19%
Instagram	66%	46%	34%	46%	17%	36%	40%	18%
Printed travel guides or publications from the destination	57%	55%	42%	57%	13%	53%	27%	17%
Twitter	51%	39%	45%	51%	25%	49%	30%	16%
Snapchat	63%	39%	33%	38%	31%	41%	41%	16%
Magazines	78%	46%	27%	38%	11%	27%	41%	15%
Hotel websites	22%	39%	67%	31%	58%	15%	33%	14%
Facebook	60%	45%	26%	44%	19%	40%	41%	13%
TV or other video ads	76%	41%	28%	34%	16%	28%	50%	13%
Pinterest	66%	49%	25%	46%	15%	36%	41%	13%
YouTube	65%	49%	27%	40%	14%	36%	38%	11%
Airline websites	17%	33%	41%	31%	76%	9%	42%	10%

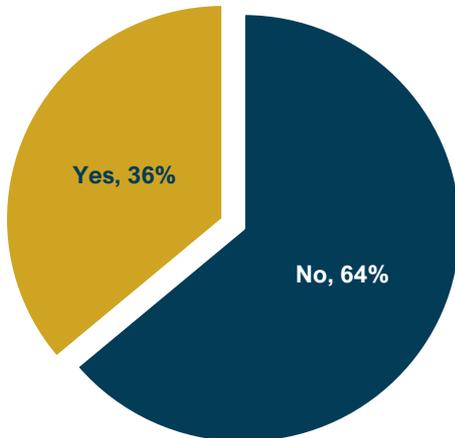
Travel Guides

- 36% of people report using a printed travel guide.
- A larger percentage of people have viewed the travel guide online – 56%.
- Digital guides are much more likely to be viewed online rather than downloaded.
- 84% of people who used a printed guide also used a digital one.
- 35- to 54-year-olds were more likely to use a printed travel guide than the other two age groups.

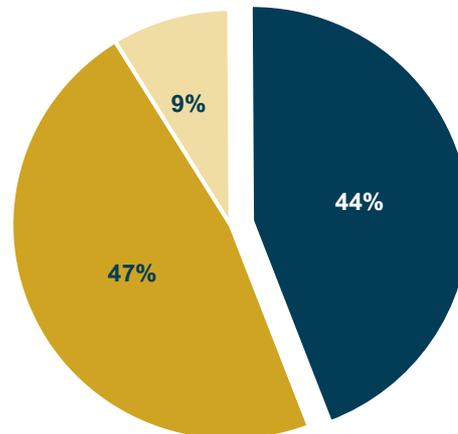
Digital Guide viewers most used both types of guides



Used a Printed Travel Guide

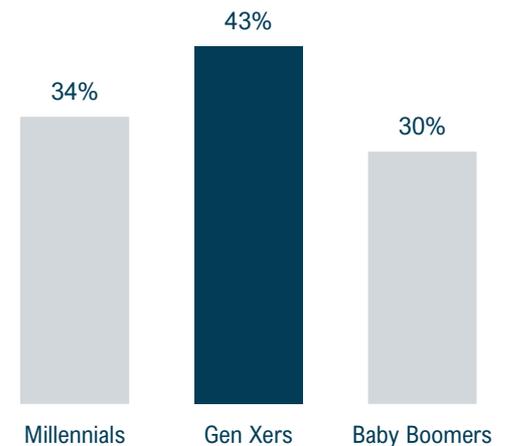


Used a Digital Travel Guide



- Yes, I looked at it online
- Yes, I downloaded/saved it for future reference
- No

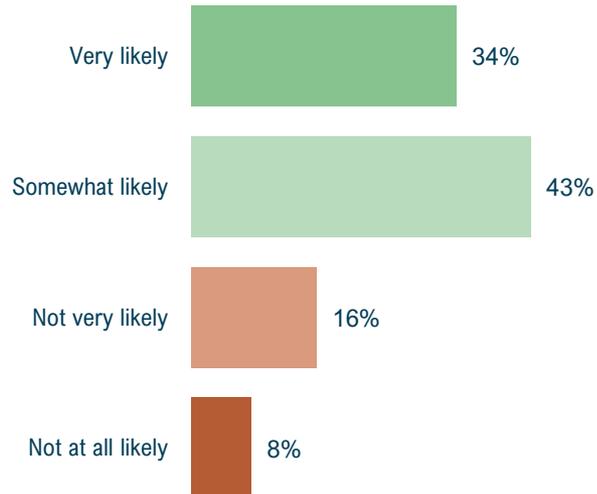
Use of Printed Guide by Age



Printed Travel Guide

- 3 out of 4 of visitors said they are likely to use a printed travel guide in the future.
- 42% of visitors request printed travel/visitors guides **via the website and have it mailed to them.**
- Almost half pick up a guide in market at a **hotel, a place they were visiting** or a **Visitors Center.**

How likely are you to use a printed travel guide in the future?



How did you get the printed travel or visitors guide?



Why did you get the printed guide?

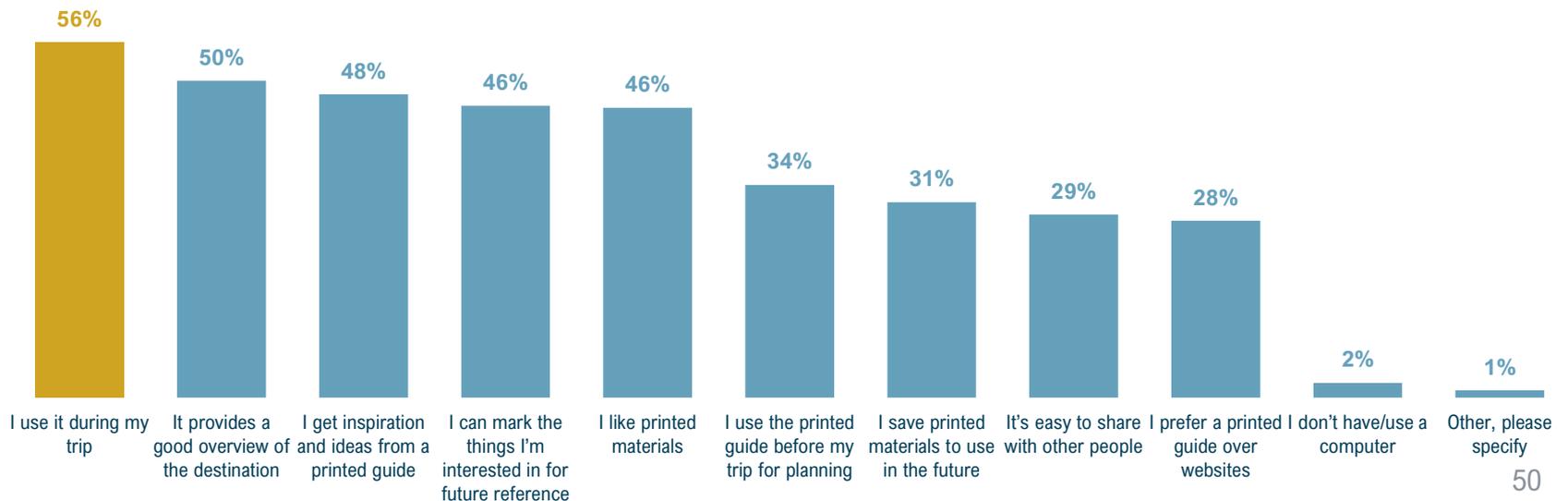
Most people who got the printed guide used it on their trip – 56%.

A large proportion of people say that printed guides provide a good destination overview, are inspirational, give ideas of things to do and allow for you to mark what's interesting for future reference.

Less than half of people state that they like printed materials, with 28% saying they prefer them over websites.

Guides are used with other sources, by a variety of people. Only 2% of guide users report not having a computer.

Why did you get a printed guide?



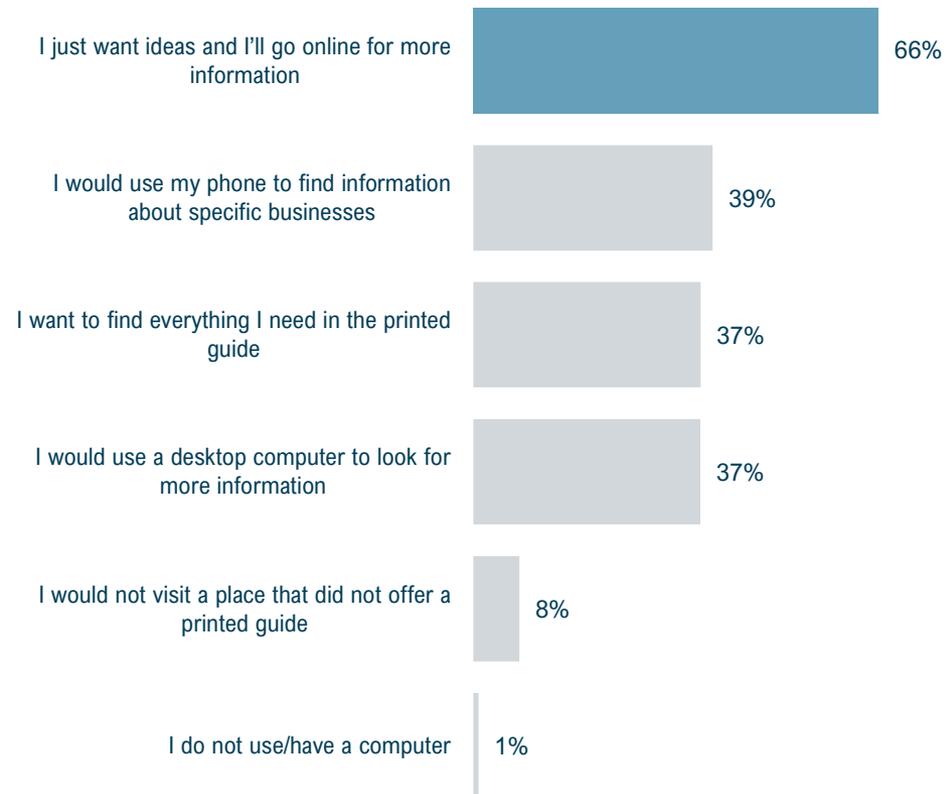
How the printed guide is used

- Printed guides are used more for planning trips than during trips.
- More than 2 out of 3 people use the printed guides to choose a destination among a group.
- 66% of people want the guide to inspire them and will go online to do more detailed research.

Printed Guide Usage



When using a printed guide...?



Important Features of Travel Guides

The travel guide is valuable to potential visitors because it inspires, helps visitors compare destinations and build their trip itineraries. On the right is a chart of travel guide features, sorted by the percent of potential visitors that found the feature important.

- 100% of potential visitors rated both listings of things to do/attractions and a general overview as important. Potential visitors want information that helps give them a sense of place and also allows them to compare against other destinations.
- Articles about things to do, where to eat, and a history of the destination score higher for importance by potential visitors than past ones.
- While the “insider” articles rank lower in importance, past and potential visitors score this feature 10%+ higher than the average of all respondents, including people who won’t visit Hendersonville.
- QR codes, advertising and a welcome from a city/area official score the lowest for importance.

Travel Guide Features Rated as Important (3+ Rating %)	Past Visitors	Potential Visitors
Listings of things to do/attractions	94%	100%
General overview of the destination	94%	100%
Articles about things to do	91%	98%
Articles about where to eat	87%	92%
History of the destination	83%	91%
Maps	93%	90%
Listings of restaurants	95%	88%
Photography that shows the destination	88%	87%
Listings of places to stay	87%	85%
Festivals and events	86%	84%
Articles about what’s new	82%	83%
“Insider” articles written by locals	78%	81%
Listings of shops	86%	73%
QR Codes or website addresses that link to more information	60%	48%
Advertising	48%	45%
Welcome from a city/area official	62%	41%

Listings Visitors Prefer and Use

The chart to the right rates the content travelers want to see included in guides.

- 2 out of 3 said that they prefer most of the items of information *except for the accessible icon and pet-friendly icon*. These features are important to niche audiences.
- The most used items of information are the **web address**, the **physical address** and the **hours of operation**.
- The **web address** has the same level of preference as it does usage.
- The high score for the web address is unsurprising. It is a jumping off point for the visitor to learn more. This speaks to the idea that the travel guide is a reference tool for picking things about the trip, or even the destination itself and not necessarily a tool for detailed information.

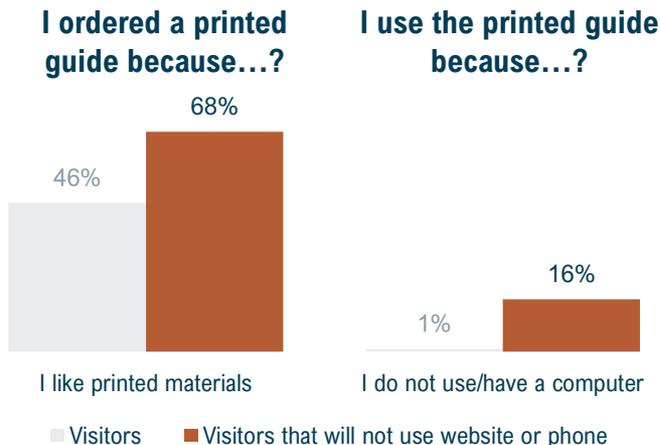
Listing Items of Information	Prefer to Include	Would Use
Website Address	69%	69%
Address	68%	62%
Hours of Operation	71%	60%
Business Name	66%	56%
Phone Number	63%	56%
Description	67%	56%
Pet-friendly Icon	38%	33%
Accessible Icon	25%	21%
None of these	3%	2%

Finding Information in Place of Listings

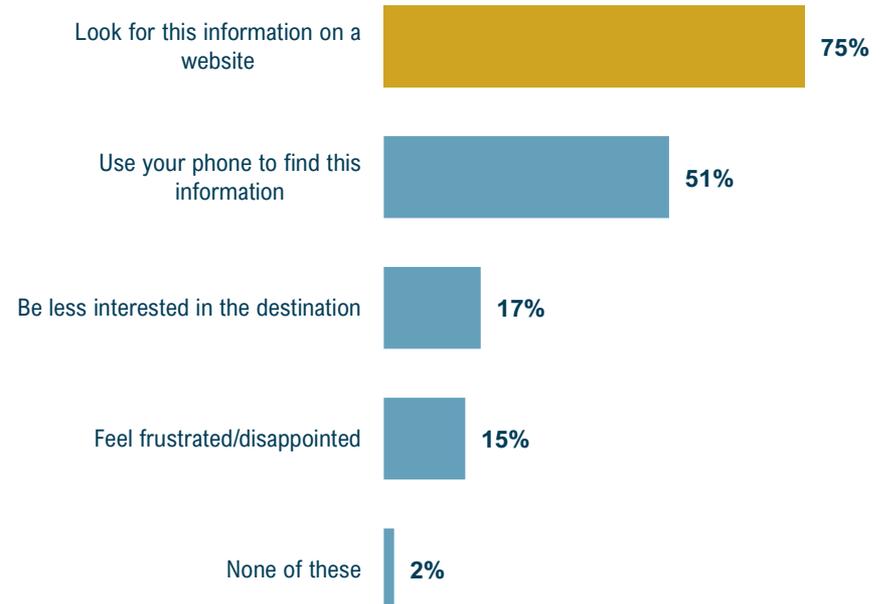
Listings provide a similar service to what can be found on the website.

- 3 out of 4 visitors would use the **website for information** if listings were not included in the travel guide.

People who said they would not look up the information on a website or phone as an alternative to listings, either prefer printed materials or don't have a computer.



If listings were not included in the travel guide, would you...?



Why I Use Listings

More than half of travelers use the listings in the guide to get ideas.

However, different age groups use listings differently.

- Millennials are more likely to look for contact information, addresses, select places to visit and go online to get directions.
- Gen Xers are more likely to use an online resource in tandem with the travel guide but less likely to look for contact information.
- Baby Boomers are more likely to use the listings for comparison.

When you use business listings in a travel guide, which of these reasons apply to you?

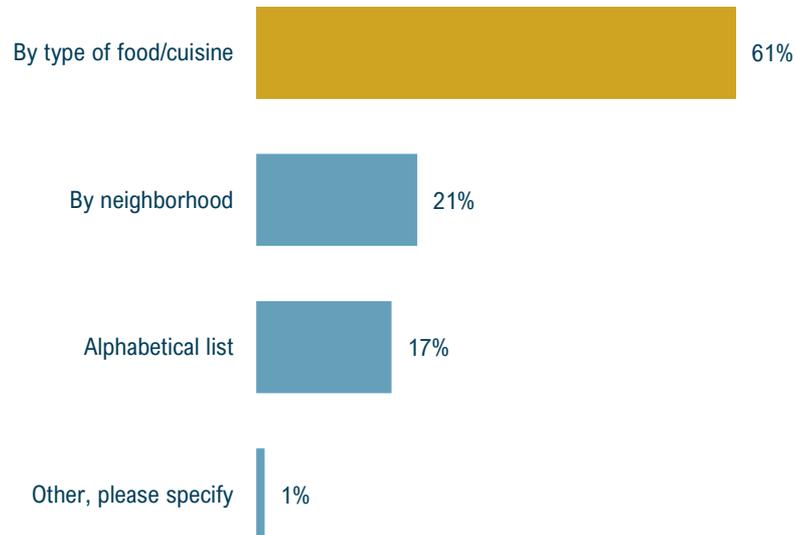


Index by Age Group	Millennials	Gen Xers	Baby Boomers
I'm looking for ideas	101	97	102
I'm looking for contact information	131	81	93
I want the listing to help me compare the location to others	90	88	124
I'm looking for an address	116	93	93
I will use this information to select and go to that business	108	99	94
I will go online to learn more about that business	90	110	98
I will use an online resource to get directions to that business	114	93	95

Organization of Restaurant Listings

61% of travelers prefer that the restaurant listings are organized by type of food or cuisine.

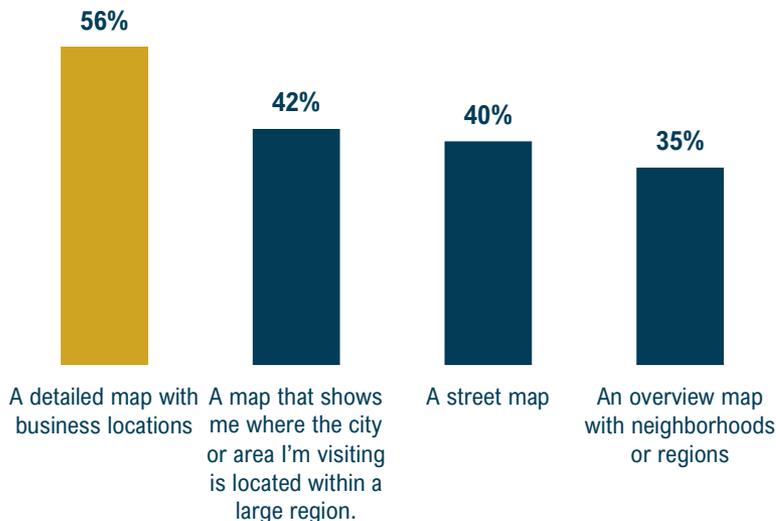
When you look for information about restaurants in a travel guide, how do you want them to be organized?



Maps in Travel Guides

- A majority of visitors find **detailed maps with plotted business locations most useful**. The other types of maps were rated less but similar to each other. The overview map of neighborhoods/regions was rated the least useful.
- When we compare the index of map usage by market, some differences arise. Visitors from Raleigh/Charlotte find maps that show the city/area as part of the larger region and street maps as much more useful than visitors from other markets. In particular the **street map is 20% more useful to the Raleigh/Charlotte market**.

What kind of map is most useful to you?

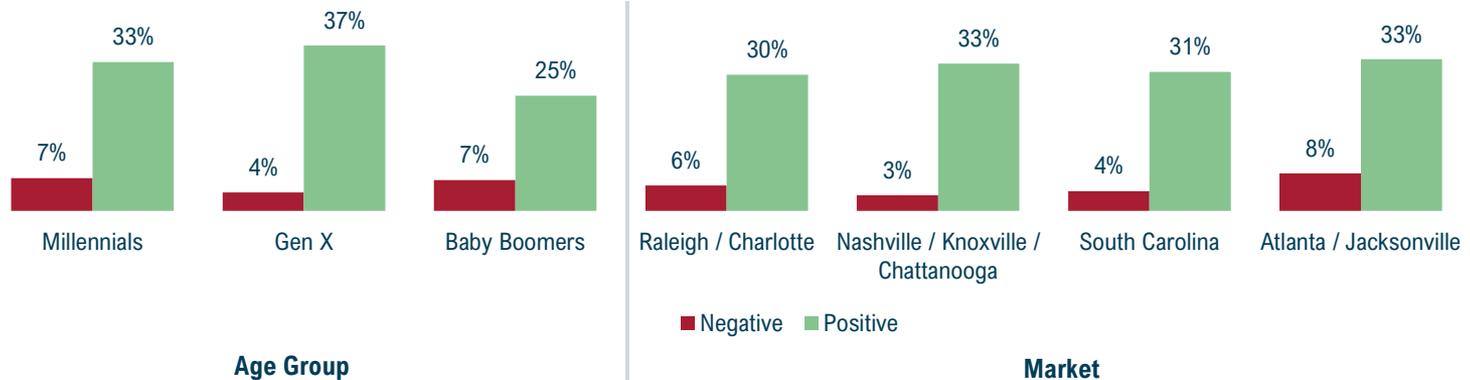


Map Usefulness Index	Raleigh / Charlotte	Nashville /Knoxville /Chattanooga	South Carolina	Atlanta /Jacksonville
A detailed map with business locations	95	100	102	103
A map that shows me where the city or area I'm visiting is located within a large region.	108	94	95	101
A street map	120	86	93	98
An overview map with neighborhoods or regions	94	104	97	104

Advertising in Travel Guides

- Most visitors responded positively when asked about how they feel about advertising in travel guides when comparing only negative or positive responses.
- **Gen Xers** and the **Nashville / Knoxville / Chattanooga** market had the most positive responses.
- **Baby Boomers** had the lowest percentage of positive scores, while **Atlanta / Jacksonville** had the highest percentage of negative scores.

How do you feel about advertising in guides?



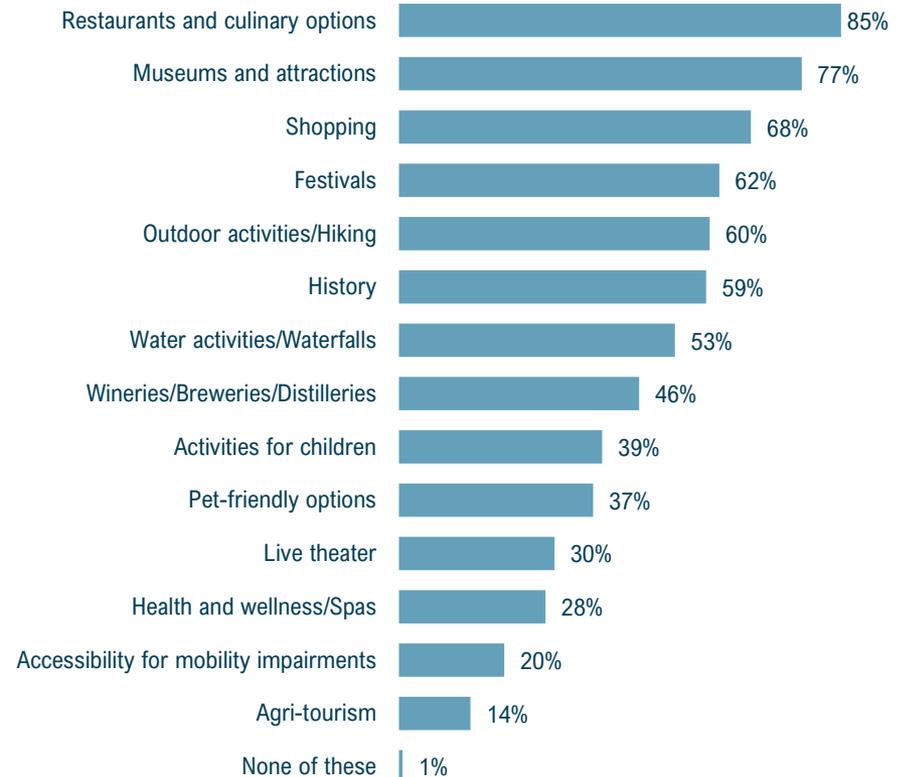
Travel Guide Topics

- The most popular topics for travel guides include restaurants, museums, shopping and festivals.
- Readers enjoy many different formats, the most popular being articles on unique things.

The types of travel guide articles I like to read



Which topics would you like to see featured in a Travel Guide?





Appendix

Questionnaire

Hendersonville Brand Assets Research
January 2022

zipcode. What is your ZIP code? _____

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

- Me
- Me and my spouse/partner
- My spouse/partner → **TERMINATE AT END OF SCREENERS**

screenergid. Please indicate which of the following describe you. The coronavirus/COVID 19 is impacting Americans' lives to varying degrees. However, for these questions we are interested in your behavior under normal circumstances.

[ROTATE]	YES	NO
I regularly use social media like Facebook, Twitter, or Instagram		
I am currently planning or have already planned an upcoming leisure trip		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home	[TRAVEL SCREENER; TERMINATE IF NO]	
I engage in skiing, snowmobiling and/or other outdoor winter activities		
I use video streaming services like Hulu, Netflix or Amazon		

AGE. What is your age? _____ → TERMINATE UNDER AGE 18

[END OF SCREENING QUESTIONS]

1. Which of the following do you typically use for travel planning?

Select all that apply. **[ROTATE]**

- Recommendations from family and friends
- Online travel agents such as Expedia and Travelocity
- Hotel websites
- Airline websites
- Other accommodation websites such as Airbnb, VRBO or HomeAway
- Booking websites such as Kayak, Trivago, Hotels.com, etc.
- Printed travel guides or publications from the destination
- Destination websites
- Television or other video ads
- Magazines
- YouTube
- Facebook
- Twitter
- Pinterest
- Blogs (not those of people you know personally such as family or friends)
- Instagram
- Snapchat
- Other, please specify _____ [ANCHOR]
- None of these _____ [ANCHOR]

1a. SHOW EACH SOURCE THEY USED AND ASK:

How do you use **[INSERT SOURCE]**...? *Select all that apply.*

1. When I am looking for inspiration and first thinking about a trip
2. When I am comparing destinations and selecting where to go
3. When I am planning my trip and selecting hotels and transportation
4. When I am planning my itinerary and activities in the destination
5. To make actual bookings for flights, hotels or activities
6. Once I am in the destination to find things to see and do

2. Have you used a printed travel or visitors guide in 2019 or 2020 or 2021? By "travel guide" we mean a publication that is provided by the tourism organization of a place. We do not mean a book that would be sold at a bookstore.

- a. Yes
- b. No

3. Many destination websites have an online travel guide, formatted like a printed guide. You may have visited a destination website, but specifically did you view or download a travel guide from a destination website in 2019 or 2020 or 2021?

- a. Yes, I looked at it online
- b. Yes, I downloaded/saved it for future reference
- c. No

4. How likely are you to use a printed travel guide in the future?
- Very likely
 - Somewhat likely
 - Not very likely
 - Not at all likely

IF NO TO Q2 GO TO Q9, IF C OR D TO Q4 GO TO Q17

5. How did you get the printed travel or visitors guide? [ROTATE]
- I requested it from a website, and it was mailed to me
 - I picked it up at a Visitors Center
 - I picked it up at a hotel or place I was visiting
 - I received it from someone I know
 - Other, please specify _____
6. Why did you get a printed guide? Select all that apply.
- I like printed materials
 - I save printed materials to use in the future
 - It's easy to share with other people
 - I get inspiration and ideas from a printed guide
 - It provides a good overview of the destination
 - I don't have/use a computer
 - I prefer a printed guide over websites
 - I use it during my trip
 - I can mark the things I'm interested in for future reference
 - I use the printed guide before my trip for planning
 - Other, please specify _____
7. When you used the printed travel guide, which of these applied to you? Select all that apply.
- I was researching a place I had decided to visit
 - I was looking at multiple places to potentially visit
 - I was looking for information about relocating/moving
 - I was on my trip and looking for information
 - Other, please specify _____
8. When you use a printed visitor guide, which of the following applies to you? Select all that apply.
- I want to find everything I need in the printed guide
 - I just want ideas and I'll go online for more information
 - I would use a desktop computer to look for more information
 - I would use my phone to find information about specific businesses
 - I would not visit a place that did not offer a printed guide
 - I do not use/have a computer

9. How important is each type of information that is typically available in a travel guide?

Feature	Not at all important	Not very important	Somewhat important	Very important
Welcome from a city/area official				
General overview of the destination				
History of the destination				
Listings of restaurants				
Listings of places to stay				
Listings of shops				
Listings of things to do/attractions				
"Insider" articles written by locals				
Articles about things to do				
Articles about where to eat				
Maps				
Articles about what's new				
QR Codes or website addresses that link to more information				
Festivals and events				
Photography that shows the destination				
Advertising				

10. IF LISTINGS ARE IMPORTANT: Travel guides often have listings of businesses and attractions in the area. In the list below, select the items of information you prefer to see included in travel guides, and indicate which of those you are most likely to use. Select all that apply.

	Prefer to include	Would use
Business name		
Address		
Phone number		
Website address		
Accessible icon		
Hours of operation		
Pet-friendly icon		
Description		
None of these		

10a. **IF NOT NONE OF THESE:** If listings were not included in the travel guide, would you...? **Select all that apply.**

- a. Look for this information on a website
- b. Use your phone to find this information
- c. Be less interested in the destination
- d. Feel frustrated/disappointed
- e. None of these

11. IF LISTINGS ARE IMPORTANT: When you use business listings in a travel guide, which of these reasons apply to you? **Select all that apply.**

- a. I'm looking for ideas
- b. I'm looking for contact information
- c. I want the listing to help me know the location compared to other places I want to go
- d. I'm looking for an address
- e. I will use this information to select and go to that business
- f. I will use an online resource to find out more about that business
- g. I will use an online resource to get directions to that business

12. IF RESTAURANTS ARE IMPORTANT: When you look for information about restaurants in a travel guide, how do you want them to be organized?

- a. By type of food/cuisine
- b. By neighborhood
- c. Alphabetical list
- d. Other, please specify _____ SPECIFY

13. IF MAPS ARE IMPORTANT: What kind of map is most useful to you? Select all that apply.

- a. An overview map with neighborhoods or regions
- b. A street map
- c. A detailed map with business locations
- d. A map that shows me where the city or area I'm visiting is located within a large region.

14. How do you feel about advertising in guides?

- a. Negative
- b. Neutral
- c. Positive

15. Which of the following topics would you like to see featured in a Travel Guide? Select all that apply.

ROTATE	
Agri-tourism	
History	
Festivals	
Museums and attractions	
Restaurants and culinary options	
Wineries/Breweries/Distilleries	
Health and wellness/Spas	
Outdoor activities/Hiking	

Activities for children	
Pet-friendly options	
Accessibility for mobility impairments	
Live theater	
Water activities/Waterfalls	
Shopping	
None of these	

16. Thinking about the types of articles you might see in travel guides, how much do you agree with the following?

Feature	1 Strongly disagree	2 Somewhat disagree	3 Agree	4 Strongly agree
I like long articles that inspire me to visit				
I like articles that give me ideas of specific things to do				
I like short, numbered lists such as "Top 10 Things to Do"				
I like to see ratings such as TripAdvisor				
I want information specific for families visiting with children				
I like articles on unique things available in the destination				
I like articles with more in-depth info on types of activities such as shopping, outdoor activities, culture, etc.				

17. How appealing are the following types of destinations when you are traveling for leisure?

ROTATE	1 Not at all appealing	2 Not very appealing	3 Somewhat appealing	4 Very appealing
Beaches				
Mountains				
Historic attractions				
Small towns				
Theme or amusement parks				
Cities				

17. How familiar are you with each of the following North Carolina mountain destinations?

ROTATE	1 Not at all familiar	2 Not very familiar	3 Somewhat familiar	4 Very familiar
Hendersonville				
Asheville				
Boone				

Highlands				
Brevard/Transylvania County				

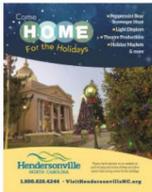
Have you visited any of these places?

ROTATE	Visited in the past 5 years	Ever visited
Hendersonville		
Asheville		
Boone		
Highlands		
Brevard/Transylvania County		

18. How likely are you to visit each of these destinations in the future?

ROTATE	1 Very unlikely	2 Unlikely	3 Somewhat likely	4 Very likely
Hendersonville				
Asheville				
Boone				
Highlands				
Brevard/Transylvania County				

Now you will be shown a series of ads for Hendersonville, NC. Please take a moment to look at each ad before answering the questions.



Atlanta mag Nov 2021 holiday PR.jpg



Charleston Living May-June 2021.jpg



Food Travel dec 2021 full - PR.jpg



USA travel guide 2021 PR.jpg

ROTATE ADS AND ASK FOR EACH

19. How does this ad make you feel about visiting Hendersonville, NC...?

Makes me less interested in visiting	Has no impact	Makes me more interested in visiting
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20. What one word comes to mind when you view this ad? _____

21. Please indicate how much you agree that this ad...

ROTATE	1 Disagree strongly	2 Disagree	3 Neutral	4 Agree	5 Agree strongly
Makes me want to learn more about things to see and do in Hendersonville					
Makes me want to visit Hendersonville for a leisure trip					
Makes me interested in visiting Hendersonville's tourism website for more information					
Shows experiences of interest to me					
Enhances my opinion of Hendersonville as a place to take a leisure trip					

22. Now, please think about **ALL** of the advertising that you just saw. Please indicate how much you agree that these ads show a place...

ROTATE	1 Disagree strongly	2 Disagree	3 Neutral	4 Agree	5 Agree strongly
That strengthens my desire to travel and reconnect with what's important to me					
Where I can have new experiences					
That has stunning natural beauty					
With a lot to see and do					
That offers enjoyable activities					

23. Overall, based on the ads you have viewed, how appealing is Hendersonville, NC, as a place to visit for a leisure trip?

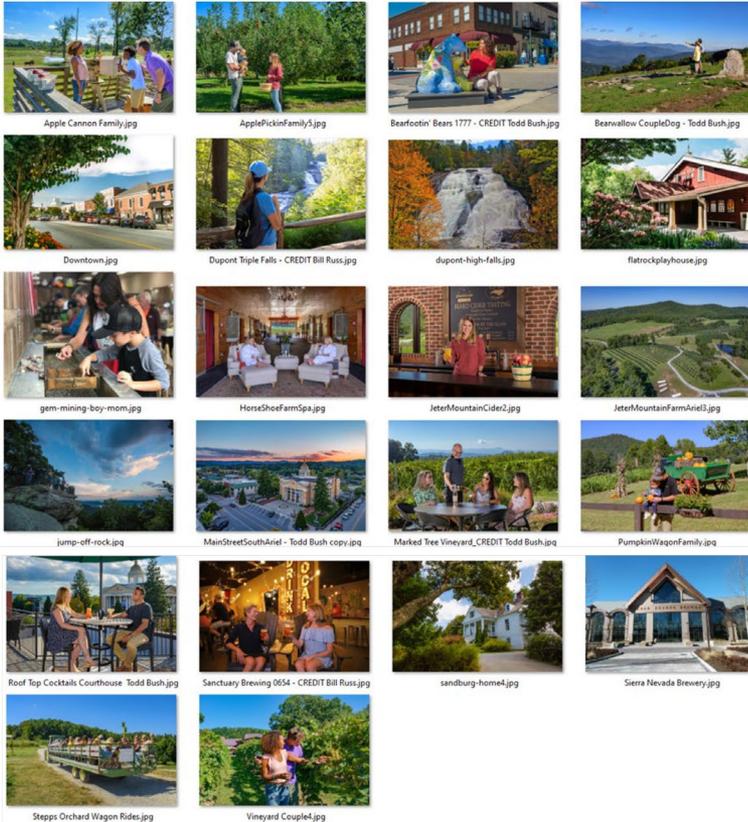
1 Very unappealing	2	3	4	5 Very appealing
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24. Why? _____

IMAGES

25. These images are from Hendersonville, NC. View the following images and say whether the image makes you more or less interested in visiting.

[ROTATE]	Makes me less interested in visiting	Has no impact	Makes me more interested in visiting
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26. Overall, based on the images you have viewed, how appealing is Hendersonville, NC, as a place to visit for a leisure trip?

ROTATE	1 Very unappealing	2	3	4	5 Very appealing
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27. Considering all of the images you have viewed, how likely are you to visit Hendersonville, NC?

1 Very unlikely	2 Unlikely	3 Somewhat likely	4 Very likely
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DEMOGRAPHICS

The following questions are for classification purposes only so that your responses may be grouped with those of others.

Gender. Do you identify as...?

- Male
- Female
- Non-binary
- Prefer not to answer

Marital. What is your marital status? Are you...?

- Married/partnered
- Divorced/separated
- Widowed
- Single/never married

Ethnicity. Which of the following best describes your ethnic heritage? *Select all that apply.*

- African American
- Asian American
- Caucasian
- Hispanic/Latin American
- Native American
- Other

PpinHH. Including you, how many people are currently living in your household? _____

Kids. [ASK IF ppinHH>1] How many living in your household are children under the age of 18? _____

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

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

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

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 or more

INVITATION

Q1=PRINTED TRAVEL GUIDE OR Q2=YES OR Q4=SOMEWHAT OR VERY LIKELY

INVITATION

We would like you to consider participating in an ONLINE VIDEO FOCUS GROUP DISCUSSION regarding Leisure Travel, which will include individuals like yourself. The group will take place on our Zoom Platform.

The group will include reviewing and discussing travel websites and printed travel materials, which will be sent to your mailing address prior to the group. As part of this project, you will be asked to review and take notes while searching a few specific travel websites. This pre-group “homework” should take no longer than 30 minutes.

During the actual discussion group, you will be required to log in and fully participate for the entire 60 minutes. **Your opinions are very important to the sponsor of this study, and your thoughtful responses are very much appreciated.** For your time and opinions, you will receive a \$125 Amazon e-gift card.

The discussion will take place:

	Date/Time
GROUP 1	February 16 th , 5:30 – 6:30 PM EST
GROUP 2	February 16 th , 7:00 – 8:00 PM EST

In order to be able to access the focus group, you will need to use a PC, Mac, iPad, iPhone or Android that has both a camera and microphone, as well as be comfortable being seen in an online Zoom focus group.

INVITE1: Are you available and interested in participating in this ONLINE VIDEO FOCUS GROUP DISCUSSION? (SHOW ONLY AVAILABLE DATES/TIMES)

1. Yes, [INSERT DATE/TIME]
2. Yes, [INSERT DATE/TIME]
3. Yes, I am interested, but I am not available those dates/times -> THANK AND TERMINATE
4. No, I am not interested in participating -> THANK AND TERMINATE

THANK YOU

Thank you for your interest and willingness to participate in our online group discussion. Within the next 2 hours you will receive an email to confirm your interest and availability for the group discussion.

Also, within the next week we will again contact you via email to final confirm your spot in the group as well as your availability to participate.

Both emails will be sent from:

From: Shelly Lindley (slindley@smarinsights.com)
Subject: INVITATION | ONLINE FOCUS GROUP – H1
INVITATION | ONLINE FOCUS GROUP – H2

Please provide the following information so that we can follow-up via email to confirm your participation, send the printed travel materials, as well as supply you with a URL and password to the secure Internet site where the discussion group will be hosted.

RECORD THE FOLLOWING:

Name: _____

Address _____

City: _____ State: _____

Phone: _____

Email Address: _____

VERIFY EMAIL ADDRESS _____