Brand Sentiment Research Study
Detailed Findings

In Partnership With

the atkins group
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Overview
Objectives

- Understand key needs/drivers in the destination selection process
- Unearth current perceptions and visual imagery that leisure visitors often associate with The Woodlands
- Define the core essence of The Woodlands brand experience, including brand personality; explore what makes the township unique and desirable
- Identify improvements that would make the township even more attractive to visitors
Methodology

- One online focus group with meeting planners; paid $150 incentive
  - Participants recruited by CVB, with assistance from area hotel sales teams
  - 7 participants, four from the greater Houston area and three from out of state (MS, WI, KS)
  - All had 10+ years experience as meeting planner
  - Two are full-time meeting planners, five have other responsibilities
  - Most plan between 1 and 9 meetings/year; two plan 10+
  - Meetings range in size from 10 to 2,000 attendees, but most are for 200-400
  - Types of meetings include: sales training, leadership, medical conference, scientific research, incentive trips, customer events, board meeting, etc.

- Online survey among The Woodlands database; 1,661 completes
  - Primary purpose was to identify and recruit participants for the focus groups, but also collected data on experience with and perceptions of The Woodlands
    - 526 completes among respondents who said they live in Montgomery County (called “Residents” for purposes of this study)
    - 1,135 respondents who said they live outside of Montgomery County (called “Visitors” for purposes of this study, although only 67% have actually visited)
  - Results cannot be projected onto residential or visitor populations since the database was derived from people who requested to be on the list and/or were intercepted at community events
Methodology

- Three online focus groups with visitors; Groups One & Two paid $100, Group Three paid $150 incentive (more affluent)
  - Group One stayed overnight in a hotel in The Woodlands; originated from The Woodlands/Houston DMA
  - Group Two stayed overnight in a hotel in The Woodlands; originated from beyond The Woodlands/Houston DMA
  - Group Three visited The Woodlands during the day or evening, without staying overnight (daytrippers)
Executive Summary
Meeting Planner Process

- Limited number of participants makes it difficult to draw definitive conclusions; more confident when looking at perceptions of The Woodlands in combination with leisure traveler studies

- Several planners said biggest challenge is finding available meeting space (around the country); opportunity for The Woodlands to introduce itself to new prospects, especially if hotels have pockets of availability (i.e. hot rates/hot dates)

- Planners said they have a set list of destinations, but are also always trying to find new destinations; meet CVBs and hotel reps at industry events, go on FAM trips
  - National hotel sales reps also play role; in general, meeting planners don’t work as closely with CVBs
  - Email and websites are best way to get information about destination to meeting planner

- For smaller meetings, convenience is often key deciding factor; consider target markets within driving distance or with direct flights, establish/package service protocol that makes meeting planners’ jobs easier & CVB invaluable

- When talking about how they define GREAT value, meeting planners took a holistic view, balancing rates with quality of experience; however, when asked how they rated The Woodlands in terms of value, everyone only talked about price
  - Most rated it of average value; perhaps they’re not familiar with the entire Woodlands story
Meeting Planner Perceptions of The Woodlands

- Planners have positive perceptions of The Woodlands
  - See it as an attractive city, conveniently located, accessible, safe, nice amenities within walking distance
  - However, some meeting planners reported that attendees aren’t as aware of the destination and aren’t excited when it’s chosen; most are pleasantly surprised, more of a “destination” than they anticipated vs. just an extension of Houston

- Most enticing qualities are:
  1. Activities in area (proximity of all of the activities to each other enhances appeal/uniqueness)
  2. Great meeting space, catering and staff
  3. Cost effective (for some)
  4. Conveniently located destination with character and natural beauty

- Planners were very complimentary of the service provided by CVB and local hotel staff; for some, this was most compelling reason to choose The Woodlands

- Traffic to and in and around The Woodlands is a concern
  - Some of the reasons it gets crossed off the list include: lack of familiarity, no availability, high room rates, not enough to do off-property, weather in summer
Residents Community Involvement

- Three-quarters of participants said they participated in at least one community event in the last 12 months, with the Red, Hot and Blue July 4th Festival and The Waterway Arts Festival getting the most traffic.

- 4 out of 10 residents said they are very involved in the community and another 5 out of 10 said they want to be more involved, leaving only 10% who have no interest in being involved.

- There is stronger support for tourism development than economic development efforts with 66% “strongly” or “somewhat” in favor of economic development compared to 80% for tourism.
  - A small portion of respondents were neutral and less than 10% oppose either initiative.
Visitor Experience With The Woodlands

- Less than 50% of visitors in The Woodlands database were “very” or “somewhat” familiar with the destination; not surprisingly, among those who had taken day trips or stayed overnight in an area hotel, familiarity was much higher
  - 32% stayed in hotel in The Woodlands last 24 months
  - 18% stayed with friends/family
  - 85% visited during the day
- Of those who have never been to The Woodlands, over 80% were “very” or “somewhat” interested in visiting
- Shopping and dining prompt the majority of trips, with family vacations and couples getaways being important drivers of overnight hotel stays
- Over 80% of all visitors shop and dine in the area; other popular activities, especially with overnight guests, are: visiting Town Center, attending an event or concert and riding a Waterway Cruiser
Visitor Perceptions Of The Woodlands

- When asked how well a series of words match their image or impression of The Woodlands, the words most often chosen were “visually stunning,” “upscale/luxurious,” “fun,” “friendly/welcoming,” and “tranquil/relaxing”; less than 40% said “great value” accurately described The Woodlands.
  - Participants used similar words when asked to list their own adjectives or descriptive phrases (open-ended question that preceded word & phrase rating questions).
  - “Fun” was offered four times more often by visitors while family-friendly was mentioned three-times as often by residents.
Where The Woodlands Fits In People’s Lives

- It is all there is to do in The Woodlands (dine, shop, go to concert/event, participate in outdoor activities) IN COMBINATION with the natural beauty of the destination that sets it apart; it feels secluded, helps people feel like they really got away
  - Participants talked about it as an “oasis,” “its own world” and “hidden”; it’s as if the woods serves as a barrier, blocking out all the stress and strains of the world, lending an air of tranquility and serenity to the destination (and cooler temperatures!)
  - Not about just nature (like a trip to Colorado might be), more like “glamping” vs. camping or “outdoor activities for a suburbanite” or “country cosmopolitan”; it’s both sophisticated and relaxed at the same time
  - Waterway adds an element of fun and excitement

- Participants said The Woodlands is suited for a wide variety of trips, with concerts/special events at the top of the list, followed by girlfriend getaway, golf (more popular among residents), family-fun, relaxing/wellness retreat and culinary adventure; overnight guests ranked romantic getaway and luxury vacation higher than day trippers and residents

- Most consider The Woodlands to be a short trip/getaway vs. a long vacation destination
  - Driven in large part by events or activities; more spontaneous, what they’re in the mood to do
  - Where longer trips are about learning, discovering something new and relaxing, shorter trips are all about escaping the stress and routine of daily lives and recharging
  - Day trips to The Woodlands are shorter versions of overnight getaways: a chance to have fun, unwind, enjoy a good meal, shop, attend a special event or celebrate a special occasion
Visual Voice & Brand Personality

- Meeting planners and leisure travelers recalled very similar visual images of The Woodlands, citing the nature aspects of the destination: pine forest, ducks, water, natural beauty, and the colors green, blue & brown
  - The Waterway, Market Street and The Pavilion are especially memorable places, as are holiday events
  - People leave feeling relaxed, feels far away/removed from hustle and bustle of city
- When asked who best personifies the personality of the destination, meeting planners named attractive, stylish, earthy, easy-going men like Robert Redford and Matthew McConaughey
- Leisure travelers also chose accomplished, classy people, who have an air of casual, approachable sophistication—both refined and relaxed
  - *Princess Kate:* Classy but down to earth
  - *Gweneth Paltrow, Actress:* Conveys herself as very natural-living, yet very classy
  - *Kate Hudson, Actress:* Very upscale, but also builds houses & cleans up after storm
  - *George W. Bush, President:* Relaxed and refined at the same time
  - *Robert Redford, Actor:* Classy but also outdoorsy
  - *George Clooney, Actor:* Handsome, but seems approachable. Very upscale, has causes
Competition

- Meeting planners said they mostly consider other Texas cities such as Austin, Dallas, San Antonio and Clear Lake; Houston difficult to get in but is a consideration if need luxury property
- For short overnight trips, leisure travels look at destinations within driving distance: San Antonio, Austin and Galveston were primary considerations
- Daytrippers stayed even closer to home, with Kemah, Galveston and Conroe topping their list, as well as nearby cities with great shopping (Katy Mills Mall, Memorial Mall, The Galleria)
- Leisure travelers learn about new destinations from: friends, Facebook posts and ads, online search, advertising and travel stories
What’s Not To Like About The Woodlands

- When asked what typically gets The Woodlands crossed off their list, meeting planners said: lack of availability of meeting space or desired hotel, lack of familiarity with destination, weather in summer, perception that there isn’t a lot to do off-property and occasionally price

- Leisure visitors said the thing they like least is the traffic and congestion
  - Some (mostly residents) expressed concern with growth of destination and what they perceive to be the “deforestation of The Woodlands”; need to be careful not to destroy what makes the destination special
  - A few complained about signage and how easy it is to get lost or find things
  - Price was an issue for some; not enough moderately-priced restaurants or affordable hotels

- Given the concern with traffic, many of the suggestions to improve the visitor experience had to do with improving transportation to and from Houston and the airport and throughout the community
  - Suggested expanding the trolley to Creekside and the Marriott resort
  - From an infrastructure perspective, many complained about wifi coverage being spotty throughout the Township
  - To leverage nature aspect further, participants suggested building a tower or roof-top restaurant where visitors could see how beautiful The Woodlands is from above; many also liked the idea of a Woodlands winery
  - Rest of suggestions had to do with expanding activities (family-type amusement park, ferris wheel, ropes course, climbing wall, Boardwalk-type games area, dining on boat, artists’ work shop area and shops, etc.)
Meeting Planners
Life of a Meeting Planner
Challenges

• The most talked about challenge was availability of meeting space with appropriate lodging (in the Houston area as well as nationally)

• Other challenges discussed included: not having enough time to plan & execute (especially given the shortage of meeting space), communication between sales and convention services and budget restraints (especially in light of turn down in oil and gas industry)

Q: What’s the most challenging aspect of being a meeting planner today?

“For any size meeting, I am finding hotel availability is much more limited than it has been.”

“Finding the right venue that fits the group is tough...large meetings where I require many breakout rooms, plus general session, plus separate areas for meals.”

“Funding is our biggest obstacle. I can’t get our company to approve the budget in a timely manner.”

“Communication and collaboration between sales and convention services seems to be more difficult.”
Process

- Meeting planners approach the process in several different ways:
  - Start with internal discussion of which cities would be ideal
    - Look at airlift, weather, outside activities, what’s in close proximity to everyone
  - Depends on purpose of meeting...for some it’s convenience, for others it’s about the amenities and what there is to do
  - Some send out RFPs (one uses AMEX Meeting Planners to do the RFP), some work with national hotel sales reps and/or CVBs
    - One participant indicated that relationships are stronger with the national sales organizations vs. CVBs
  - Some choose destination first while others work the destination and meeting venue simultaneously

- 3 planners said they have no set list of destinations, 2 have a set list but also try to find new destinations from time to time and 2 typically like to meet in new locations
  - New contact or FAM trip to a city often prompts selection of new city
  - Rotate meetings geographically
  - Desire for something new and different

Q=Help me understand the process of selecting a destination. Where do you begin? Do you have a list of “tried and true” destination or do you often search out new host cities?

“We start with an internal discussion of what city or cities would be ideal. Once that is determined, I utilize AMEX meeting planners to do an RFP on my behalf.”

“It depends on the meeting needs, the relationships I have with CVBs and contacts at certain hotels I have met at industry events. I look at air lift, weather, outside activities.”

“The client usually has ideas as to where they want to hold a meeting, sometimes down to the venue, but usually just a city. I start with RFPs to my national account contacts and weed it down from there based on cost, estimated travel needs, etc.”
Primary Considerations When Evaluating Destinations

- Among the considerations participants listed were:
  - Business need for the meeting (dictates everything)
  - Location/extent of travel for participants
  - Airlift (preferably direct flight)
  - Available space and surrounding amenities
  - Available facilities/activities for group dinners/team building, etc.
  - Weather
  - Ease of transport from airport to venue/hotel
  - Cost & concessions (space, rate, food, rebate, comp ratio)

- Smaller meetings generally have more flexibility, but convenient location is often primary factor
Defining GREAT Value

• Most participants appear to take a holistic view; balance price with the quality of the experience and ease of hosting meeting
  ‣ Look at room rates, space, food & beverage pricing, surrounding night life, walkability of destination, restaurants/dining options
  ‣ Also take concessions into consideration (comp nights, upgrades, parking, wifi, breakfast, welcome reception, meeting space, room amenities, airport transfers, incentive money from CVB)

Q=What type of attributes or quality make a destination a great value?

“I look at space rate, food, some cases rebates, comp. ratio, surroundings, night life, not just what the hotel offers, whether everything is within walking distance.”

“I have a meeting in the Spring for 100 people. I am getting $2,000 from the CVB to be used towards my meeting as I would like as an incentive for booking their city.”
Learning About New Destinations

• Most participants said email (7) and websites (5) are the best way for them to learn about new destinations
  ‣ On websites, want accurate/up-to-date information on hotels and corresponding meeting space layout, directory of ancillary services and alternative venues

• Others said they appreciate meet and greets from hotel representatives as well as an invitation to see the city first hand

• Only one person said they like to receive information via traditional mail

• Most said they do not read industry meeting planner trade publications, might “glance at them” or “read them from time to time”; a few looked at advertisements for destinations
  ‣ Mentioned M&C magazine
Perceptions Of The Woodlands
Descriptive Words/Phrases

- Conveniently located/accessible and safe were most often used to describe The Woodlands
  - Also said there is a lot to do/nice amenities within walking distance
  - Clean, attractive city
  - Friendly
  - Only 1 negative comment about a facility (pre-renovation)

- Other words participants link with the Township include:
  - Hard to get in; need more “bigger box” hotels
  - Nice area “north of the city”
  - Upscale
  - Cynthia Woods Mitchell Pavilion
  - Conference Center

Q: What 3 adjectives or descriptive phrases would you use to describe your image or impression of The Woodlands as a destination for meetings and conventions? What other words do you link or associate with The Woodlands?
What’s Surprising or Unexpected

- Participants reported being pleasantly surprised by the assistance and great customer service they received from the CVB
- Great food
- Doesn’t look like Houston
- Much more of a “destination” that attendees expect

Q=What surprises people about The Woodlands? What don’t they expect to find or experience?

“Secret CVB assistance for my meeting exceeded my expectations. Received great support for activities outside of the hotel and meeting. Need evening events and venues. They did a lot of the leg work for me.”

“It doesn’t feel or look like Houston, which is a positive for me!”

“I think the problem with The Woodlands is that it’s not viewed as a destination by attendees. But it provides what you need for a meeting. Once you get attendees there, they are impressed and enjoy it.”
Most Enticing Qualities/Attributes

- Mentioned most often were all the things there are to do in the area
  - Golf
  - Restaurants
  - Shopping
  - Accessible outdoor activities
  - Nightlife
  - Arcade golf
  - Concerts (love Cynthia Mitchell Woods Pavilion)

- A close second was the great meeting space, outstanding food, catering and staff

- Destination is cost effective
  - Liked pricing structure with food and beverage included, makes it easy to budget

- Destination has a lot of character, love the trees and waterway

- Convenient/accessible

Q: Name three or four of The Woodland’s most enticing qualities or attributes as a site for meetings and conventions.
What’s Unique

• Three of the seven participants said they could not answer this question

• Rest of group seemed to think that it was not just all that there is to do, but how close it all is to each other; makes it very convenient, very doable city

• A few also said the natural beauty of the destination is appealing; like that it’s a community built into a forest that’s very close to a big city

• While not necessarily unique, a few took the opportunity to again say how excellent the hotel staff has treated them—from their sales person to event manager and the hostess at the restaurant, everyone goes out of their way to make sure event is successful

Q=Finish this sentence. ONLY in The Woodlands can you...

What, if anything, is truly unique to The Woodlands?

“Have a meeting, play a round of golf, grab some dinner and see a concert, all within walking distance.”

“The walkability, the convenience, the accessibility, the safety. You can meet, dine, relax, exercise, shop...maybe not one-of-a-kind experiences, but it’s super convenient and consolidated.”

“I think it has a lot of character. Probably the most of any Houston suburb.”

“I love the fact that it’s nestled into the forest and there is all the waterways. It make it a very peaceful location.”
Combine Business & Pleasure With Extended Stay

- Three said it’s not the type of destination where attendees extend their stay like they do in some of the other places they have been (Jacksonville, Los Angeles, Miami, Phoenix)
- A few said people in their groups love to stay over
  - Golf
  - Shop
  - Swim/relax by pool
- Some bring their families with them to enjoy the destination

Q=Is The Woodlands the type of destination where attendees would typically want to add on vacation days either before or after the meeting?

"I don’t see any add on vacation days to The Woodlands area except maybe to stay in the area for an event, like the rodeo or to shoot down to Galveston for the weekend."
Location & Transportation

- Prevailing thought was that many are not familiar with the area and some may assume that The Woodlands is just an extension of Houston.
- Many said Houston has a bad reputation; it’s important for people to understand that you are not in Houston when you are in The Woodlands.
- Being close to Houston and the IAH can be a plus as long as people understand how different The Woodlands experience is.
- Participants reported having great experience with airport transportation and charters for off-site activities, although some activities planned in Houston (NASA) proved to be too far.
- Getting around within The Woodlands can be difficult, no local transportation; must use charter if traveling away from central business district.

Q: Help us understand what meeting planners say about the location of The Woodlands?

“Most people are not familiar and assume that The Woodlands is just like any other area of Houston. I think Houston has a bad reputation as a destination.”

“From a national perspective I think it’s viewed as a suburb (of Houston). But it is so much more than that.”

“It is distinct from Houston, close to IAH, yes, but you are NOT in Houston when you are at The Woodlands.”

“Even if it is close to Houston (which it is), with the traffic problems in Houston, it takes forever to get anywhere, which is a deterrent.”

“If my meeting is in The Woodlands, we will not leave that area.”
How Attendees Feel About The Woodlands

- Most meeting planners said The Woodlands is not a destination that their delegates get overly excited about, however most like it once they get there
  - Been there a lot, ready for a change
  - See it as “nothing too special”
  - Some say it’s expensive

- When asked what’s not to like about The Woodlands three participants could only respond that “it’s a wonderful place”

- Among the concerns expressed were:
  - Traffic
  - Overflow hotels are not as special as the headquarter hotels; attendees feel slighted
  - One planner said it doesn’t have “the pizzazz” of a major city and people aren’t that familiar with it; may hurt destination for certain meetings, but not all
  - Another participant said attendees felt like the destination lacks character; everyone else in the group disagreed
  - There was also a complaint about the lodging in the duplexes being rundown, but they are gone now; would have to be “sold” on new lodging in order to return

Q=How do meeting participants feel about the selection of The Woodlands for a meeting? Is this a destination that they can’t wait to visit, pretty run-of-the-mill, or somewhere in between? What’s not to like about the Woodlands? What are some common objections or concerns?

“We have been in The Woodlands for several years so many of our attendees are ready for a change.”

“I don’t think they get too excited about The Woodlands. Once there, they will enjoy it and may return.”

“For our attendees, it’s pretty much run-of-the-mill. International attendees love the shopping, but that’s about it. They often comment that it is expensive.”

“The overflow hotels have been an issue in the past. Many of my attendees feel they are getting shafted.”

“Our attendees do not like the generic feeling of it. Many of our attendees feel like it has no character.”
Value Rating

- No one talked about anything other than cost; whether they thought the destination was of great or average value had to do with their point of comparison on price for venue, F&B, etc.
- Two participants rated the value “great”
  - Cost was less compared to other destinations for the same meeting
- Five said the value was “good” or “average”
  - Prices were the same as, or higher, than other destinations
  - Want to be able to negotiate package that works for their meeting

Q: Where does The Woodlands fall on the value scale...do you see it as a great value, average value, poor value?

- “It is a great value, a true value. Prices are very reasonable compared to other venues. The meeting I planned there has also been in Chicago and Summerlin, NV. The Woodlands was probably 30% below other venues for the same meeting. The Fitness Event was 50% less than Chicago Fitness.”
- “Average value compared to other venues we considered in other cities. In the RFP process the pricing that The Woodlands uses is sometimes seen as very high since others are just listing the room rate.”
- “It’s average value. Rates and amenities are about the same that we get in other cities with the same chain of hotels.”
- “It’s average value. The meetings at the facility are high at times. There’s no play in hotel costs like F&B all day package.”
- “Compared to other venues in Houston, it’s a good value.”
- “Given our low F&B compared to other meetings, we really do have a great value on room rental & A/V.”
Most Compelling Reason To Choose The Woodlands

• Vast majority of participants said the primary reason they would choose The Woodlands is the quality of service that they receive
  ‣ One participant disagreed, saying she receives the same level of service from other destinations and one said she did not find the hotel staff to be attentive

• Meeting at The Conference Center is like being on vacation

• More cost effective

• Convenient

Q= Thinking about all the attributes and qualities we discussed, what is the SINGLE MOST COMPELLING REASON to host a meeting or convention in The Woodlands?
Reasons The Woodlands Gets Crossed Off List

- Lack of availability in lodging or choices for luxury/higher end hotels
- Meeting space totally booked
- Room rates too high
- Lack of familiarity on a national/global stage; Houston (and The Woodlands) would not be a desirable location
  - Only reason ever consider Houston is because they have more luxury hotel options, otherwise rarely consider Houston due to traffic and space availability
  - Transporting from airport to downtown venue also difficult in Houston
- Weather in the summer
- Not enough off-property things to do
- When asked if price gets The Woodlands eliminated, a few said it has
  - Have had to explain and defend the rate to decision makers
  - Depending on occupancy, rates can be very high

Q=What are the types of things that typically get The Woodlands crossed off the list? Help me understand how often, if ever, price gets The Woodlands crossed off the list?
Meeting Facilities

- Participants talked about two facilities: The Woodlands Conference Center & The Woodlands Waterway Marriott Hotel & Convention Center
  - Conference Center has great packages with food, space, etc. Better than the Marriott
  - Conference Center updates are great
  - Marriott space was good, flexible and met needs
  - Marriott is only space large enough for bigger meeting

- General comments were about the meeting space being flexible, with lots of options on size of rooms and lots of break out rooms

- Three participants also said that there should be no room rental if planning food
Visual Voice & Brand Personality
Visual Images

- Participants described it as “picturesque,” citing the nature aspects of the destination: trees, ducks, water, natural beauty, cleaner air
  - Loosing some of the appeal of buildings being hidden in the trees with all of the development
  - Space is well-planned—both along The Waterway and in the venue
- Know you have arrived when you see the pine forest, also cooler at times
  - See the Exxon building, lots of houses and corporations
- Memorable places included: The Waterway, Market Street, The Pavilion, Hubble & Hudson Grocery (which is no longer there)
- Meeting planners associate the colors green, blue and brown with The Woodlands: the color of nature—trees, water and sky

Q: What pictures or images come to mind when you think of The Woodlands as a destination for meetings and conventions?
How, if at all, do you know you have arrived in The Woodlands?
What is the one place you’d take a delegate so they would always remember their visit?

“It’s very beautiful, huge forest, cooler at times because of the trees.”
How The Woodlands Makes People Feel

- Nature was the predominant theme with respect to what lingers about the destination after a group has visited
  - The smell of pine trees
  - The natural beauty, “get lost in the green”
    - Green also referred to money/savings (cheaper than other places)
  - Also mentioned fine dining
  - Three participants said they weren’t sure what lingers
- Visiting The Woodlands leaves people feeling relaxed; feels far away, remote from the city

Q = What lingers about the destination after you or your attendees have visited? What do people remember most? How does a trip to The Woodlands make you feel?

“People feel relaxed. The layout, convenience and nature make it relaxing.”

“I’ve grown up in Houston. For me, I don’t feel like I’m close to a big city.”

“It is far enough away from home that it is a bit of a vacation and it is far enough from Houston proper to be out of town.”
Brand Personality

Participants were asked to name a famous person, dead or alive, who most embodies the personality or spirit of The Woodlands. Named approachable, relaxed, easy going, confident superstars like:

Matthew McConaughey, Actor
Simple, stylish, relaxing, cool

George Strait, Singer
Clean, relaxed, organized. A home away from home.

Robert Redford, Actor
Attractive, earthy, easy going, put together, confident. City chic in a Texas suburb; defies definition

“I can’t think of a name, but I don’t think The Woodlands feels like Texas at all when compared to DFW, San Antonio or Austin. It’s more like a woody area in the Pacific Northwest or Colorado with the mountains. I don’t get a Texas vibe at all.”
Competition
Other Destinations Consider

- Mostly consider other Texas cities along with The Woodlands included:
  - Austin (2)
  - Dallas (3)
  - San Antonio (2)
  - Clear Lake area (2)
  - Houston (1)

- Also mentioned Savannah, Memphis and Hilton Head (can handle same size meetings), off the strip in Las Vegas, Chicago suburbs, Kansas City, Phoenix and Nashville

- Several said they tend to stay in cities where they have some corporate presence

- Can learn from Los Angeles and Nashville
Detailed Findings
Online Leisure Survey
Resident Only Questions
Participation In Community

Which of the following community events have you attended in the past 12 months?
(Check all that apply)

- July 4th Festival
- Waterway Arts
- Lighting of Doves
- Taste of Town
- Ironman
- Wine & Food Wk
- None

Community Events Participated In, Past 12 Months

- Red, Hot and Blue 4th of July Festival and the Waterway Arts Festival were the most popular events with almost half of resident respondents indicating they attended these events in the last 12 months.
- Almost one-quarter of those surveyed did not attend any of these events.
- The only difference among age groups is that those 65+ were less likely to attend (41% did not attend any event).
- Those earning $150K+ were more likely to attend the Waterway Arts Festival, Wine & Food Week and Ironman.
- No differences by gender.
Participation In Community

Which of the following statements best describe your involvement in your community?

a) I am involved in my community.  
b) I'd like to be more involved in my community.  
c) I have no interest in being involved in my community.

- 45% of those 55+ say they are involved in community vs. 37% of those 25-44
- 60% of 25-44 year olds want to be more involved in community vs. 49% of those 45+
- More of those earning $150K+ are involved in the community than those earning <$150K; given this, those most likely to want to get more involved had HHI <$150K
- No differences by gender
Participation In Community

Support For Economic Development & Tourism Efforts

5=Strongly Favor, 1=Strongly Oppose

- Men are more supportive of both economic development and tourism initiatives
  - 84% of men vs. 71% of women said they “strongly favor” or “somewhat favor” economic development efforts
  - 85% of men vs. 79% of women said they “strongly favor” or “somewhat favor” tourism efforts

- Older respondents are more strongly in favor than younger
  - 48% of those 45+ “strongly favor” economic development efforts vs. 34% of those <45
  - Half of those 45+ “strongly favor” tourism efforts vs. 32% of those <45

- No differences by HHI

How do you feel about economic development efforts to recruit companies to relocate or expand their business in Montgomery County?

How do you feel about tourism efforts to attract more leisure visitors to Montgomery County?
Visitor Only Questions
**Experience With The Woodlands**

Q: How familiar would you say you are with The Woodlands?

- **0**
- **14**
- **28**
- **42**
- **56**
- **70**

**Very Familiar**

**Somewhat Familiar**

**Neither**

**Somewhat Unfamiliar**

**Very Unfamiliar**

---

- **68%** of 25-34 year olds vs. 47% of those 35-54 and 37% of those 55+
- **65%** of those who earn $150K+ are “very” or “somewhat” familiar vs. 46% of those with HHI < $150K

- Not surprisingly, those who have visited The Woodlands, either for an overnight or daytrip, were more familiar with the destination
Experience With The Woodlands

Number of Trips To The Woodlands, Last 24 Months

- 44% of women who participated in the survey made 6+ trips vs. 34% of men
- No significant differences by age or HHI
- Overnight hotel visitors have made an average of 5.3 trips in the last 24 months while daytrippers have made an average of 6 trips

Q=Approximately how many trips to The Woodlands have you made in the last 24 months? (Asked only of those who indicated they had visited The Woodlands)
Experience With The Woodlands

Q=How interested are you in visiting The Woodlands?
(asked only of those who have never visited)

Interest In Visiting The Woodlands Among Those Who’ve Never Been

- 67% of those who live outside of Montgomery County (visitors) said they have been to The Woodlands
- Of the 33% who had not, 83% were very or somewhat interested in visiting
- No differences by gender, age or HHI

n=350
Experience With The Woodlands

Q: During the last 24 months, have you...
- Stayed overnight in a hotel in The Woodlands?
- Stayed overnight with family or friends in The Woodlands?
- Visited The Woodlands during the day or evening, without staying overnight?

- 296 of those who said they have visited The Woodlands did so more than two years ago
- No difference in gender or age for stayed overnight in hotel
- 18-34 year olds more likely to stay with friends/family than those 35+
- Those with HHI $100K+ were more likely to stay in a hotel
- No difference by gender, age or HHI for daytrippers
Experience With The Woodlands

Primary Reasons That Prompted Trip(s) to The Woodlands (Top Seven)

- Shopping and dining out are primary drivers for all visitors, but even more so for daytrippers.
- Family vacation and couples getaway are important drivers for Overnight Hotel Visitors.

Q: Please select the PRIMARY reason(s) that prompted your trip(s) to The Woodlands during the last 24 months (select all that apply).
Experience With The Woodlands

Other Primary Reasons That Prompted Trip(s) to The Woodlands

- While spa and golf have high appeal among niche audiences, they do not appear to be primary trip driver for the majority of visitors.

Q: Please select the PRIMARY reason(s) that prompted your trip(s) to The Woodlands during the last 24 months (select all that apply).
Experience With The Woodlands

Activities Participated In

- With more time to spend, overnight visitors are more likely than Daytrippers to visit Town Center, attend an event/concert and ride a Waterway Cruiser.
- That being said, almost half of Daytrippers visit Town Center and almost 40% attend an event or concert.

Q: While visiting The Woodlands in the last 24-months, which of the following did you do? (Select all that apply).

Total Respondents | Overnight Visitors, Stayed in Hotel | Daytrippers

- Restaurant: 86% | 82% | 92%
- Shop: 87% | 83% | 90%
- Town Center: 80% | 64% | 49%
- Event/Concert: 64% | 47% | 21%
- Waterway Cruiser: 21% | 9% | 9%
- Hike/Bike: 21% | 7% | 7%
- Sporting Event: 9% | 7% | 8%
- Event at Conv. Ctr.: 6% | 6% | 5%
- Golf: 3% | 5% | 3%
- None: 3% | 4% | 3%
Perceptions of The Woodlands
Q=How well do these words match your image or impression of The Woodlands (asked of residents and visitors who said they were familiar with the destination)

- “Visually stunning,” “upscale/luxurious,” “fun” and “friendly/welcoming” ranked the highest among all audiences
- Less than 40% of those surveyed see The Woodlands as a great value
Residents rated almost every attribute significantly lower than visitors.

Although the order changes slightly by audience, “fun,” “visually stunning,” “upscale/luxurious” and “friendly/welcoming” ranked the highest among all audiences.

The destination is at once “fun,” “tranquil/relaxing,” and “energizing,” especially among overnight visitors.

Q=How well do these words match your image or impression of The Woodlands (asked of residents and visitors who said they were familiar with the destination)
Visitors and Residents used many of the same words to describe The Woodlands, but they tended to place different importance on them based on their relationship with The Woodlands; for instance, while “beautiful” was the word used most often by both groups to describe the Woodlands, visitors mentioned the fun/entertaining atmosphere four times as often as residents and residents said family-friendly almost three times as often as visitors.
Three Words Visitors Used To Describe The Woodlands

- Beautiful, pretty, scenic, attractive, lovely, picturesque, gorgeous, breathtaking, stunning
- Relaxing, calm, comfortable, peaceful, serene, tranquil, peace of mind, refreshing, rejuvenating
- Fun, entertaining, enjoyable
- Positive affirmations such as: amazing, appealing, awesome, charming, classy, delightful, enchanting, excellent, exceptional, extraordinary, fantastic, gracious, grand, impressive, interesting, magical, nice, pleasant, popular, unforgettable, wonderful
- Nature at its best, amazing trees, beautiful landscape, natural, forested, nature/hiking/biking trails, green, wooded/woody, lakes, outdoorsy, plants and fauna, beautifully landscaped
- Upscale, affluent, exclusive, first/high class, high-end, luxury/luxurious, refined, regal, posh, prestigious, prosperous, ritzy, sophisticated, elegant, wealthy
- Friendly, inviting, welcoming
- Lots To Do, variety of activities and sights, night life, outdoor recreation, great entertainment options/venues, concerts, golf, boat rides, The Waterway
- Clean
- Exciting, adventurous, energizing, lively, intriguing, vibrant
- Awesome/great/fabulous shopping, wide variety of shops, love the Mall
- Great dining/restaurants, many options, outstanding/delicious food
- Family-friendly/family-oriented
- Difficult to navigate, crowded, congested, easy to get lost, hidden in the trees, confusing
- Great atmosphere, cozy, authentic, bucolic, quaint, quirky, set apart, secluded, private, eclectic
### Three Words Visitors Used To Describe The Woodlands

<table>
<thead>
<tr>
<th>Word</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modern, contemporary, innovative, progressive, cosmopolitan, stylish, trendy, visionary</td>
<td>31</td>
</tr>
<tr>
<td>Convenient, accessible, everything is so close, close enough to Houston, great location</td>
<td>30</td>
</tr>
<tr>
<td>Master-planned, organized layout, logical, masterfully planned, well-planned, well-designed, well groomed and maintained, good zoning</td>
<td>28</td>
</tr>
<tr>
<td>Active, busy, bustling</td>
<td>25</td>
</tr>
<tr>
<td>Safe, secure, good security</td>
<td>24</td>
</tr>
<tr>
<td>Unique, distinct, different, nowhere like it</td>
<td>23</td>
</tr>
<tr>
<td>Has Everything You Need, a city all its own, all-encompassing, complete, the “Bubble”, fully developed</td>
<td>17</td>
</tr>
<tr>
<td>Great Quality of Life, beautiful life, full of resort-like amenities, great place to live, community-oriented, livable</td>
<td>16</td>
</tr>
<tr>
<td>Big, growing, booming, always something new</td>
<td>15</td>
</tr>
<tr>
<td>Pricey, expensive</td>
<td>13</td>
</tr>
<tr>
<td>Romantic</td>
<td>11</td>
</tr>
<tr>
<td>Walkable, easy to get around</td>
<td>9</td>
</tr>
<tr>
<td>Suburban</td>
<td>6</td>
</tr>
<tr>
<td>Uppity, snooty, snobby, entitled, can be pretentious</td>
<td>5</td>
</tr>
<tr>
<td>Nice accommodations/lodging</td>
<td>4</td>
</tr>
<tr>
<td>Was prettier before deforestation</td>
<td>1</td>
</tr>
</tbody>
</table>
Three Words Residents Used To Describe The Woodlands

- **Nature abounds**, natural beauty, green, trees, lush, wooded, forest, great nature parks, endless bike/walking trails, canopied, environmentally-friendly/conscious, great views

- **Beautiful**, breathtaking, gorgeous, captivating, picturesque, pretty, stunning, visually inviting

- **Relaxed**, peaceful, quiet, tranquil, calm, easy-going

- **Upscale**, fine living, fancy, high-end/class, ritzy, glamorous, big houses/big mortgages, financially secure residents, prosperous, prestigious, rich, sophisticated, wealthy, stunning lifestyle

- **Lots to do**, always something going on, entertaining, many family-friendly/free activities, good entertainment venues, land of plenty, outdoor recreation, great night life, wonderful concerts

- **Friendly**, inviting, open, welcoming

- **Clean**

- **Positive affirmations**, including: awesome, amazing, great, exceptional, fabulous, fascinating, fantastic, charming, nice, impressive, interesting, inspiring, interesting, outstanding, wonderful, spectacular, world-class

- **Great Place To Live/Work/Play**, good work-life balance, great place to raise a family/children, very livable, amazing/great/excellent amenities, resort living, community-driven, neighborly

- **Crowded**, congested, overbuilt, overgrown, hard to get around/find places, horrible traffic, growth problems

- **Fun! Fun! Fun!**

- **Very active community**, always people running, biking, etc., busy, bustling, energetic, lively

- **Great restaurants**, wide variety, outdoor dining

- **Great place to shop**, lots of stores, easy to get to, outdoor shopping on Market Street
<table>
<thead>
<tr>
<th>Score</th>
<th>Word(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>30</td>
<td>Everything you need is here, all-inclusive, self-contained, “the Bubble”</td>
<td>• Overdeveloped, overbuilt, deforestation, development company more interested in profits then preserving balance of wooded lifestyle, diminishing trees, loosing trees, no more “woods,” getting too large, whatever happened to no buildings above the tree line? It’s what made The Woodlands attractive and different</td>
</tr>
<tr>
<td>25</td>
<td>Safe</td>
<td>• Big city amenities/small town feel, country cosmopolitan, city in the country</td>
</tr>
<tr>
<td>25</td>
<td>Homey, hometown, home sweet home</td>
<td>• Unique, no place like The Woodlands, different</td>
</tr>
<tr>
<td>25</td>
<td>Convenient to shopping, dining, great location, close to home, easy access</td>
<td>• Expensive, overpriced</td>
</tr>
<tr>
<td>21</td>
<td>Fast growing, evolving, thriving</td>
<td>• Suburban</td>
</tr>
<tr>
<td>20</td>
<td>Snobby, pretentious, stuffy, insular, fake, artificial, cliquish, entitled, uppity</td>
<td>• Healthy lifestyle, great place to exercise and be healthy, athletic</td>
</tr>
<tr>
<td>17</td>
<td>Modern, progressive, contemporary, trendy</td>
<td>• Great medical care, cutting edge medicine, excellent hospitals</td>
</tr>
<tr>
<td>14</td>
<td>Exciting, exhilarating, adventurous, stimulating, upbeat</td>
<td>• Great schools, highly sought after schooling</td>
</tr>
<tr>
<td>12</td>
<td>Cultural, artsy, creative</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Diverse, ethnic, eclectic, multi-cultural</td>
<td></td>
</tr>
</tbody>
</table>
A community known for great events, festivals and lots to see and do.
A foodie’s paradise, with many indie restaurants and national chains.
A resort-like destination where you can relax and escape.
A nature-filled sanctuary with outdoor recreation, hiking and waterways to explore.
A great shopping scene, with many local boutiques and big box retailers.

• Dominant image is of destination that offers lots to do and see, including great events, festivals and shopping—all nestled in a nature-filled setting with outdoor recreation, hiking and waterways to explore.

• No significant differences between residents and visitors or by age.
How Well Descriptions Match Image or Impression of The Woodlands
(10=Perfect Match, 1=Does Not Match)

- Lots To See & Do: Overnight Hotel = 8.9, Daytrippers = 8.6
- Great Shopping: Overnight Hotel = 8.8, Daytrippers = 8.6
- Nature-Filled Sanctuary: Overnight Hotel = 8.6, Daytrippers = 8.2
- Resort-Like: Overnight Hotel = 8.5, Daytrippers = 7.9
- Foodies Paradise: Overnight Hotel = 8.2, Daytrippers = 8.1

Overnight hotel visitors were more positive overall about each of the descriptions; rated “resort-like” significantly higher than daytrippers (and residents).

A community known for great events, festivals and lots to see and do.
A foodie’s paradise, with many indie restaurants and national chains.
A resort-like destination where you can relax and escape.
A nature-filled sanctuary with outdoor recreation, hiking and waterways to explore.
A great shopping scene, with many local boutiques and big box retailers.
### Rank Order: What Makes The Woodlands Unique Or Special

<table>
<thead>
<tr>
<th></th>
<th>RESIDENTS</th>
<th>OVERNIGHT VISITORS</th>
<th>DAYTRIPPERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woodsy, nature-inspired location/setting</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Recreational &amp; entertainment options</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Dining</td>
<td>4</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Intentionally-designed, master-planned community</td>
<td>2</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Vibrant Town Center</td>
<td>5</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Shopping</td>
<td>6</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Texas Hospitality</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

- All audiences seemed to think that The Woodlands nature-inspired setting is the number one thing that makes the destination special.
- Residents ranked the master-plan and recreational/entertainment options second and third while master-plan ranked near the bottom for visitors.
- Overnight visitors put dining options and Town Center second and third while daytrippers listed dining and shopping.
- Younger visitors ranked recreation & entertainment second.
Participants ranked all of the types of trips about the same with the exception of concerts/special events, which is clearly perceived to be the type of trip most suited for The Woodlands.
How Suitable The Woodlands Is For Different Types Of Trips
(10=Perfectly Suited, 1=Not At All Suited)

- There is a significant difference in the suitability of The Woodlands as a golf trip destination among residents and visitors; could be an awareness/familiarity issue.
- Visitors are also more apt to think of The Woodlands for family fun trip, relaxing/wellness retreat, culinary adventures and romantic getaways.
How Suitable The Woodlands Is For Different Types Of Trips
(10=Perfectly Suited, 1=Not At All Suited)

- Only significant difference is the perception of The Woodlands as a romantic getaway and a luxury vacation destination; overnight visitors more apt to think of The Woodlands for this type of trip.
Detailed Findings
Online Leisure Traveler Focus Groups
Long vs. Short Vacations
Long Vs. Short Vacations or Getaways

• Most participants said they take 1 to 2 long vacations a year
  ‣ Recent trips included many international locations such as: Germany, Italy, Ireland, Spain, France, Greece, The Bahamas, The Caribbean and Mexico
  ‣ Tended to name states or regions (West Coast, East Coast) more than individual cities, including: California, Colorado, Florida, Hawaii, New York, Wyoming, South Carolina, Tennessee, Oregon and Texas
  ‣ Most of the individual cities were relatively large cities such as: Austin, Chicago, Dallas, Houston, Los Angeles, New Orleans, Orlando, San Antonio, Santa Barbara, San Francisco, San Diego
    - The Woodlands was mentioned by 3 who lived outside the Houston metro area

• Not surprisingly, participants take many more short vacations or getaways—anywhere from 3 to 4 a year to as many as one or more a month (12+)
  ‣ For those who live in the area, typical short getaways include: The Woodlands (11), Austin (10), San Antonio (8), Galveston (7), New Orleans (5), Dallas (5) and Baton Rouge
  ‣ Group 2 participants were geographically dispersed so their short getaway destinations were more scattered; The Woodlands received 9 mentions and Dallas, Galveston and New Orleans were the only other locations to receive multiple mentions (3 each)
Discovering New Destinations (Overnight & Day Trips)

• Desire for adventure or something different often prompts the search for a new destination; a few mentioned having “Bucket Lists”

• Find out about new destinations from: friends, Facebook posts and ads, online search, advertising and travel stories
  ‣ Google search, travel booking engines/review sites (Yelp, TripAdvisor, Travelocity, Lonely Planet, Expedia, Hotwire and hotels.com), destination websites, travel blogs
  ‣ Mentioned TV Travel shows, ads and articles in publications, including: Texas Monthly, Southern Living, Texas Highways, Houstonian, Coastal Living, Family Fun, Southwest, Travel & Leisure, American Road, Travel, Better Homes & Gardens, Imbibe, AAA and AARP
  ‣ Many also mentioned emails with special offers and travel guides/brochures from CVBs and State tourism offices

• Visit community websites
  ‣ Most helpful information includes: calendar of events, summary of activities/attractions, pictures, information about cost, coupons/specials and package deals, hotels, restaurants, reviews, parking info/traffic and weather
  ‣ Several mentioned organizing website by categories to make it easier to find what they’re looking for

Q: What prompts the search for a new destination?
What’s the best way to get information to you about a destination?
What kind of information is more helpful on a community’s website?

“New Orleans has a great site. They break down things to do based on why you came...a section on romance, a section for families, a section for foodies, a section for music lovers, history buffs, etc.”

“Usually I’ll watch a Travel Channel/show (like Texas Country Reporter) or my husband will read about somewhere in a magazine that we want to check out.”

“The need for something different, something exciting or unpredictable typically prompts the search for a new destination.”

“I love finding package deals on lodging and restaurants. If I can find a place that has a two-night getaway that includes at least one non-breakfast meal and either an event pass or something unique to do, I’ll usually choose that before anywhere.”
Considerations When Choosing Overnight Destination

- Many said longer trips are often to new destinations, but also return to favorite destinations where they know their way around; makes for an easier vacation
  - Must appeal to everyone in the family
  - Start with a few key factors: how long they have, the budget, who’s going, what they hope to see/do
  - Safety is a concern
- Shorter trips/quick getaways are usually within driving distance and often to places that participants are familiar with; driven in large part by events or activities
  - Often embarked upon at the last minute; specials/deals can influence travel plans
  - How much time they have off dictates how far participants are willing to travel
  - Take into consideration who’s going and what kind of activities will appeal to them; is the getaway about time to rest or time to play?
- Seasonality/weather plays into decision making; want to go when it’s the best time to visit

Q: Help me understand the process you go through when deciding where you’re going to go on vacation. Where do you begin the process? What qualities or attributes are most important to you when considering a destination?
Where Long Vacations Fit In Life

• Participants in both overnight groups most often said that they hope to come away from longer vacations relaxed and with memories from spending time together with family

• Also about having an adventure, seeing new sights, learning something new and getting to know a destination and its culture
  ‣ Diverse activities, something everyone will like, have fun!

• Requires more planning and coordination, a lot more stress just to get there
  ‣ Budget
  ‣ Usually involves family; coordinate timing/schedules of everyone going
  ‣ Pet/house sitters
  ‣ Packing
  ‣ Flights
  ‣ Lodging & transportation
  ‣ Itinerary
  ‣ Directions
  ‣ Some cooking, cleaning

Q=What makes for a GREAT long or extended vacation? What do you hope to come away with?

"It's a balance between relaxation, experiencing new places and cultures, and making memories with our daughter."

"Longer trips need more planning to make sure there isn't a dull moment."

"Hopefully I come away with a lot of rest and less stress, but definitely a good feel for the people, culture, food and fun experiences."

"I hope to leave with a memorable experience the whole family will talk about for years to come."

"It's a combination of relaxation, catching up, and learning something new about the region we are visiting. Taking tours and traveling to gain some new knowledge."

"I feel like on long ones I still have to cook and clean and then fit in as much as possible. It's go, go, go. Short getaways are more relaxing and spontaneous."

"It's a balance between relaxation, catching up, and learning something new about the region we are visiting. Taking tours and traveling to gain some new knowledge."
Purpose of Short Vacations or Getaways

• The majority of participants in both groups said shorter getaways provide a break from the stress (and monotony) of everyday life; provides a chance to recharge their batteries
  ‣ While some talked about these getaways as important time for their families, many seemed to use them to reconnect with their spouse

• Less is more: less packing, less planning, less stressful
  ‣ There’s a “degree of spontaneity which can be liberating and surprisingly fun!”
  ‣ Pace is much slower compared to long vacation where families feel compelled to experience as much as possible
  ‣ Since investment is not as steep, can do as little or as much as you want

Q: Thinking about shorter getaways, what do you hope to take away? What purpose do they serve in your life?

“These are small infusions of life, energy and rest. They are very necessary to keep up the daily grind.”

“Short vacations are more relaxing and spontaneous.”

“It’s a chance to take a break from work and responsibilities. A way to recharge and just have fun. To try something new.”

“A one or two night getaway could be just what the doctor ordered to maintain sanity and take a break from everything and everyone.”

“With short getaways the goal is to get a mental break from the rest of the world—relaxing, hiking, enjoying nature.”

“On a short trip you don’t feel like you need to get out and see the sites. It’s just for relaxing, sleeping in and eating great food.”
Daytrips

• Most participants said they take 1 to 3 day trips/month
  › Places they typically visit included: Galveston (12), The Woodlands (11), Kemah (6), Katy (6), Austin (4), Houston (3) + The Galleria (3), Kingwood (3), Spring (2) and Conroe (2)
  › Other places mentioned included: Beaumont, Brenham, Clear Lake, Humble, Lake Charles, Rosenberg, Schlitterbahn (location not specified), Shiner, SixFlags (location not specified), SugarLand and Tomball

• Participants take day trips for many of the same reasons that they go on short vacations or getaways
  › Have fun
  › Change of pace/scenery
  › Unwind, relax
  › Create memories
  › Enjoy the outdoors
  › Eat a good meal out
  › Shop
  › Attend special event/celebrate special occasion

Q=About how many daytrips do you take in an average month (where you visit a town for a day or eventing by do not stay overnight)?
What are some of the places you visit for these day trips?
What makes for a GREAT day trip? What do you hope to come away with?

"Sometimes it's just nice to change the pace and do something that's out of the ordinary."
"I take the trips because I want to do something fun with my family, something different from around here. I want my kids to have different experiences."
"They are a release from everyday stress, something to do just for fun."
"A great day trip is one where you can come back home relaxed, whether it is going to the movies, going out to eat, shopping or just seeing the sites."

"It's an escape from everyday life and stress."
Choosing A Day Trip Destination

• Like short getaways, day trips are often driven by a specific reason to go (i.e. go shopping, eat at a specific restaurant, see a concert, etc.)
  ‣ News story or online posting sparks interest/desire to visit as do recommendations from family and friends
  ‣ Give consideration to how long a trip it will be, what’s the traffic and weather like, how much will it cost, who’s going and what they want to do

• Most have a list of tried and true destinations, but look for new places to experience

• Among the attributes that participants said are more important in selecting a destination are:
  ‣ Is this a place where everyone going will have fun? What’s there to do?
  ‣ How far/long will it take to get there?
  ‣ Can I afford it?
  ‣ What’s the weather like?
  ‣ How easy is it to navigate?
  ‣ Is it safe?

Q=Help me understand the process you go through when deciding where you're going to go on a day trip. Where do you begin the process? What qualities or attributes are most important to you when considering a destination?
Perceptions
Descriptions of The Woodlands

- For Groups 1 and 2 The Woodlands was most often described by listing how much there is to do and see; for Group 3 this was the second most often mentioned feature
  - Something for all ages, family-friendly
  - Variety of shopping
  - Great places to eat
  - Concerts with big name artists (@ The Cynthia Woods Mitchell Pavilion) and events (like Ironman)
  - Great community pools
  - Outdoor activities like kayaking, hiking, cycling, iceskating (during the holidays)
  - Golf

- For Group 3 (daytrippers), the most prominent description had to do with the beauty and nature aspects of the destination (came in second among the other two groups), with specific mentions of the abundance of green trees, wildflowers, parks, water features, walking trails and wildlife
  - Helps it feel like a real getaway, adds sense of tranquility and “hometown feel”; shade from trees makes it cooler

- Group 3 also used the term “family-friendly” and “safe” a lot in their descriptions

Q=Describe The Woodlands to someone who’s never been there before. What other words do you associate with The Woodlands?
Descriptions of The Woodlands

- Group One often described The Woodlands as “classy,” “upscale” and “exclusive,” while many in Group Two used “luxurious,” “refined” or “first class” to describe it (many had stayed at the Resort), Group Three also used “upscale” and “high-end”

- A few in Group One thought of The Woodlands as a romantic destination and several focused on how “relaxing” and “peaceful” it is, but also “fun,” “upbeat” and “exciting”

- Group One mentioned that The Woodlands was growing/expanding

- Several in Group Two, who had stayed at The Woodlands Waterway Marriott Resort, were enamored with the music underwater at the pool and their cookies

- The only negative comments came from participants who live in the area and had to do with The Woodlands becoming crowded, hectic and congested and difficult/confusing to navigate with everything hidden behind the trees; this was not brought up by Group Two

- Only one person said the residents of The Woodlands could be pretentious
Words Used To Describe The Woodlands

- "The Woodlands is like the perfect city that has everything to offer right there!"
- "An upscale community with a family feel nestled amongst trees, with all the amenities of a metropolitan city without all the clutter."
- "There’s lots to do. Malls, golf, restaurants, shops, activities. But it’s a little confusing to find your way around."
- "It’s a unique blend of trees and culture, fine food and friendly faces, kayaking and cycling."
- "The Woodlands is full of family-fun activities. You’ll never be bored. Everyone always seems so nice, and loves to live a full life."
- "The Woodlands is full of family-fun activities. You’ll never be bored. Everyone always seems so nice, and loves to live a full life."
- "Great place to see a concert and the parking is not too bad. Great Market Street area and other Town Center areas for dining and a little shopping. But man, can get SOOO crowded and congested with traffic! Have to plan your arrival and departure times."
- "It’s a great place to get away. Lots of trails, restaurants, water, activities, friendly people. Most exciting is the villages and the walkability to village centers and shops."
- "Refreshingly beautiful, first-class in quality, yet attainable. Worth it."
- "It feels like a very family-friendly environment, not too flashy. However, Market Street would be the Rodeo Drive of the community with all its glitz and glam."
- "Lots of SAFE walkways in a breathtaking natural environment with water features, classy restaurants and unique shopping."
- "Very exclusive, athletic community, lots of high end shopping."
- "Close by Houston, but very different. Feels like a real getaway. Lots to do, see, eat, shop."
- "It’s an upscale community that’s hidden in the trees. Even though it’s high end, it doesn’t feel it. It feels very natural."
- "The Woodway cruise boat is romantic as well as sitting out in front of Landry’s on the water or any of the restaurants outside on The Waterway."
- "The Waterway cruise boat is romantic as well as sitting out in front of Landry’s on the water or any of the restaurants outside on The Waterway."
- "It spoke volumes to me as being a luxurious place that we could afford to go."
- "It feels like a very family-friendly environment, not too flashy. However, Market Street would be the Rodeo Drive of the community with all its glitz and glam."
- "Very exclusive, athletic community, lots of high end shopping."
- "It seems as though developers now days don’t care about wildlife and The Woodlands fights to preserve that. We love it!"
- "Clean, lot of trees, upscale. You won’t think you are in a city, has a hometown feel."
- "Nature. Peaceful. Yet busy with things to do and keep you busy."
- "I love the nature feeling it gives us as well as a mix of suburbs, shopping and entertainment/restaurants."
- "I feel very safe walking with my daughter around The Waterway without my husband. That’s a big deal because I don’t feel trapped in a hotel."

"I feel very safe walking with my daughter around The Waterway without my husband. That’s a big deal because I don’t feel trapped in a hotel."
Unexpected or Surprising

• The preservation of nature and the impact on how this makes people feel was often cited as the most surprising or unexpected aspect of the destination
  ‣ Feels like its own world, open
  ‣ Beautiful from the moment you enter
  ‣ A hidden jewel
  ‣ Trees and birds were amazing
  ‣ Quiet, relaxing, peaceful

• The Waterway also added an element of fun and excitement to their experience
  ‣ Fountains are fun to watch, similar to the Belagio in Vegas
  ‣ Great people watching

• A few in Group One expressed concern that too much development could destroy what makes The Woodlands so special

• Other surprising qualities were the friendliness of the people and great customer service; happy to see visitors, felt like extended family

Q=Thinking back to the first time you visited The Woodlands, was there anything that you found unexpected or surprising?
Woodlands As Short Getaway vs. Longer Vacation Destination

- Most participants said they think of The Woodlands as a short getaway destination, although a considerable number of those in Group Two who live further away said it could be both
  - So close to home and familiar, doesn’t feel like a longer vacation destination
  - Too expensive to stay a long time, especially because it is so close to home
  - Not big enough or enough to do for long vacation

- To encourage a friend to visit for a short vacation/getaway, participants most often said they’d tell them about all the things to do and that they would will feel like they had really gotten away
  - Try to plan trip around an event
  - Can do as much or as little as you want
  - Great for girls day of shopping, couples dates, family trips, golfing and singles

- For longer stay vacations participants suggested using The Woodlands as a launching pad for surrounding area
  - Can easily visit Galveston, Lake Conroe and Houston, although Houston got mixed reviews due to traffic

Q=Do you think of The Woodlands as a place to go for long or extended vacations, for shorter getaways, or both? What would you say to convince a friend to visit for a short vacation or getaway?
Best Thing About The Woodlands

- Same three themes emerged: nature/beauty of the destination, so much to do so close to home and how refreshing a trip to The Woodlands is
  - Described as “the completeness” of the experience, a breath of fresh air
  - Close to downtown, but feels greener and cleaner
- Group One said The Waterway and Market Street area are a close second to the beautiful scenery
- Group Two continued to give high praise to the “luxurious” Marriott resort
  - Feel pampered, like a Queen!
  - Very relaxing
  - Great pool experience
- The daytrippers also talked about the small community feel, how safe The Woodlands is and how much they like that almost everything is within walking distance; makes it easy to enjoy yourself

Q=Of all the things we’ve talked about, what’s the absolute best thing about The Woodlands?

“It’s a city within nature.”

“It’s just peaceful in a rat-race!”

“Tucked into the landscape gives a feeling a privacy and adventure.”

“It has everything, but you just don’t feel like you are in a big city. It’s a nice feeling...a big community with a small town feel.”

“It’s the completeness of the experience. It’s not one best thing. It’s that everything is the best.”

“I know it sounds corny, but I just feel better when I’m in The Woodlands. There’s no one thing...it’s a combination of the people, places, food and fun.”

“The kids love that there is so much to do but we just don’t feel as rushed to do it all.”

“Going back to The Woodlands is like taking a breath of fresh air or coming back to life.”
Favorite Things To Do In The Woodlands

- Walking around/chilling out at The Waterway area was cited most often by overnight visitors as one of their favorite things to do, followed closely by attending concerts at The Cynthia Woods Mitchell Pavilion, eating at restaurants and then shopping at the Mall and Market Street area
  - For daytrippers, dining out and shopping were mentioned most often, followed by attending concerts and visiting The Waterway area
  - Among specific bars and restaurants mentioned were: Cheesecake Factory, Cru Wine Bar, Crush Wine Lounge rooftop, Jasper’s Grimaldi’s Pizza, Katz’s Deli, Kirby’s and a few general references to Hughes Landing

- Several people in Group One said they love to visit The Woodlands to partake in Christmas/holiday activities, 4th of July and Arts Festival events

- Collectively, there were a few mentions of golf, kayaking, running/walking the trails, visiting the parks and playgrounds and riding the trolley

- Swim in the resort pool also got several mentions from overnight guests

Q=Name 3 or 4 of your favorite things to do in The Woodlands.

“I love the outdoor feel.”

“We always take guests on the Waterway cruisers. Love the concert venue and The Waterway concerts too.”

“The Woodlands Pavilion is the best concert venue on earth! We go to lots of concerts. It’s beautiful. It’s organized. The staff is great. The variety of concerts is awesome.”

“We love to watch the fountains in Waterway plaza and walk around The Waterway, shop at the mall and eat at some of the wonderful restaurants.”

“I love to go for a run on the trails, walk The Waterway, eat at an outdoor patio.”
Unique To The Woodlands

- Many participants who live in the area talked about getting away to a beautiful place without going far away; the combination of big city amenities found in a natural setting
  - World class concerts/entertainers you wouldn’t expect to find in a city this size
  - Combination of nature and sophistication is a defining element
- Group Two had a tougher time defining what makes The Woodlands unique or different; mentioned being able to relax in the beautiful setting and the convenience of being able to walk to most of the stores and restaurants from your hotel
- Group Three also focused on the atmosphere as a key differentiator
  - The culture, the way it was designed and the people who live there give it a unique feel; like a small town (in a good way), home away from home
  - It’s peaceful, fun, feel like you’re on vacation even when visiting for just a day

Q=Finish this sentence: Only in The Woodlands can you...what experiences can you have in The Woodlands that you can’t have anywhere else?

“Be close yet get away from Houston in a fun, family-friendly environment.”

“Get away without going far away.”

“It’s city life with a country twist.”

“It’s just the feel. Safe, small town friendly.”

“I think you can experience many of the things The Woodlands offers other places—shopping, outdoor concerts, etc. But it’s close to home and all the events are done right so it’s our special place close to home.”

“Kayak, swim, golf, cycle, eat fine food, drink fine wines, all in one day!”

“Walk through trees with birds and squirrels, cruise The Waterway, then shop and dine at high-end places.”

“Only in The Woodlands can you enjoy a world class concert, walk down The Waterway to your hotel (or the skybridge) and then walk along the lit trees to an amazing restaurant.”

“It’s just the feel. Safe, small town friendly.”
Participants said the The Woodlands offers a wide variety of locally-owned shops and boutiques as well as major retailers, but what makes the shopping unique is the environment

- Beautiful green space; feels less rushed, less stressful
- Leisurly stroll outside to many of the stores, especially nice when the weather is good, and then dine at great restaurants
- Free trolley
- Parking is less of a hassle
- More personalized service

“There’s lots of green space to catch your breath between stores.”

“The trolley will take you very close to anywhere you’d like to shop and pick you back up. It’s free too! That’s so unique and I LOVED not having to drive everywhere.”

“The Woodlands is very walkable. One stop shopping with restaurants too. You can find anything you need in Houston, but you would have to drive a lot more.”

“The atmosphere is different...it’s less stressful and you aren’t hemmed in. And the parking in the Galleria—OMG, it scared my parents. We had to leave and come to The Woodlands.”

“Not so rush, rush, rush like Houston.”

Q: What is unique or different about the shopping opportunities in The Woodlands?
Dining

- Referred to as a “foodie heaven” with a “massive variety” of restaurants in close proximity being the most often mentioned attribute
  - From hamburgers to five course gourmet meals, casual to elegant
  - Any type of food: steak, vegetarian, BBQ, seafood, Mexican, Chinese, Japanese, Italian, etc.
  - One of a kind, independently-owned to many chain restaurants (although participants had trouble naming some of the locally-owned)

- Quality and service are generally superb

- Group Three also liked how many outdoor eating options there are and said the dining experience in The Woodlands is just better; less busy, more convenient and nicer atmosphere
  - Cleaner, safer environment
  - Easier to park

- Among restaurants named were: Crisp, Ruggles Green, Kirby’s, Jasper’s, Hubbel and Hudson, Fielding’s, Fleming’s, Yukatan Taco Stand, Grimaldi’s Grott, Cheesecake Factory, PF Chang’s, Mi Cocina, Pallottas, Katz Deli, Pufferbelly’s

Q=What would you tell a foodie about dining options in The Woodlands?

"You can eat outside and have that city feel without being in the city."

"Oh my gosh, anything you want, you can find!"

"There’s so many unique, independent restaurants, but the big names are there too."

"It’s not as spread out as Houston. Places are easier to get to."

"Everything is the best you’ve had. Each type of food tasted AND looks like it was made by the best chef for that particular food."

"Less traffic, parking is easier, ambience is better!"
Special Events & Festivals

- The Christmas Holiday season was by far the most often mentioned special event for visitors to enjoy
  - Lighting of the Doves
  - Ice Skating
  - Decorations
- Not surprisingly, participants who live in the area were much more aware of events than those who live outside the area
  - Locals named Red, Hot and Blue Festival and Fireworks over 4th of July, Labor Day, Memorial Day, Halloween Trick-or-Treat Trail, Children's Festival, Margarita Fest, Wine Week, Arts Festival, IronMan, and free summer concerts
  - Most of those who live outside the area only mentioned the holidays and concerts at The Pavilion; one person named 4th of July events

Q=What unique or exciting special events or festivals happen in The Woodlands that visitors would enjoy?

“Christmas time is to die for, so much going on and decorations are awesome.”

“I was there one year when there was an art festival happening up and down both sides of The Waterway...I LOVED seeing all the local artists and just strolling along with my daughter.”

“Name a holiday, there’s something interesting going on at The Woodlands.”
Outdoor Recreation

• Participants from the area listed many outdoor activities for visitors to experience
  › Golf
  › Swimming and splash pads around town
  › Kayaking/canoeing
  › Fishing
  › Biking/hiking/walking nature trails and in parks (and along The Waterway)
  › Bird watching
  › Playgrounds for kids
  › Boat rides
• Those from outside the area mentioned nature trails, biking and water activities like swimming and kayaking
• Outdoor recreation opportunities are in close proximity to each other
• Well-maintained
• Surrounded everywhere by nature vs. roadways and buildings
• Suggested adding a ropes course and zip line like Moody Gardens

Q: What outdoor recreational opportunities would be appealing to Woodlands' visitors?

“They’re all so close to each other. No getting in the car and driving a while to the next fun thing. It’s all right there.”

“It’s not overcrowded and it’s well maintained.”

“The surroundings are just so pretty!”
Nature As Backdrop Or Trip Driver

• Most participants who live in the area said nature is more of a back-drop vs. the primary reason for their trip; it does differentiate and add to the experience of the destination, but it’s the combination of nature with big city amenities that is the draw
  ‣ Sets the mood, setting is spectacular WHILE people shop and dine; nature in a city
  ‣ Can spend time outdoors without having to give up civilization; “more like outdoor activities for a suburbanite,” “like glamping”
  ‣ Too “high falutin” for rugged outdoor types, but appeals to “outdoor-lite” visitors who enjoy walking/hiking, bird watching and being outside
  ‣ Wouldn’t come as often if nature was the only thing it had to offer

• Those from outside the area were more apt to say nature was a backdrop AND a trip driver
  ‣ Outdoor types would love the trails and wildlife and outdoor activities
  ‣ Feels like a green oasis near the desert
  ‣ Nuanced: less about outdoor adventure than about natural beauty

Q=Would The Woodlands appeal to someone who’s looking for a nature-filled vacation?

“It’s more a break from shopping and eating.”

“It’s nature-ish.”

“It makes the neighborhoods and retail more special.”

“It doesn’t drive the trip decision per-se, but it’s a great mood setter for any stay.”

“Sets the mood, setting is spectacular WHILE people shop and dine; nature in a city”

“Can spend time outdoors without having to give up civilization; “more like outdoor activities for a suburbanite,” “like glamping”

“Too “high falutin” for rugged outdoor types, but appeals to “outdoor-lite” visitors who enjoy walking/hiking, bird watching and being outside

“Wouldn’t come as often if nature was the only thing it had to offer

“You can go to Alvin or Santa Fe to look at trees but it does not have the rest of the amenities that The Woodlands has.”

“I love shopping and doing the restaurants, but sometimes I just want to enjoy the outdoors with hiking and seeing nature.”

“It’s sort of the differentiator. If I really wanted nature, I’d go to Colorado or something, but in The Woodlands, you get everything a city could offer, plus in a natural setting with lots of nature options.”

“For folks like me who like controlled nature followed by food & wine, it’s perfect.”
Value Scale

- Most participants in Group One rated The Woodlands of "average" value while the majority of those in Groups Two and Three said it was a "great" value
  - Most common reason for rating it average was that it can be expensive/pricey
  - While some in Group Two and Three also said The Woodlands can be expensive, the overall sentiment was that there is something to fit everyone's budget
    - Wide variety of things to do
    - Relatively hassle free
    - No place like it near by
    - Worth it, feel great when you leave

Q=Where does The Woodlands fall on the value scale...do you see it as a great value, average value, poor value?

"Great value. You can spend as little (cycling, swimming, kayaking) or as much as you want (concerts, fine dining)."

"It's an awesome day trip. They will not be disappointed. Lots to see and do."

"Great value. It has everything to go and have a great time without the hassles of big city traffic and crime."

"Average value. I think it comes with a price to relax there."

"It would be a great value if it were less pricey, but then again, we wouldn't likely have the same experience."

"It is worth every penny to escape the concrete jungle of Houston."

"I'm taking everything into account, including prices, activities, lodging, etc. I think what you get compared to the cost is excellent."
What Visitors Don’t Like

• Group One mostly talked about the traffic, congestion and crowds, also mentioned by other two groups, but to a lesser degree
  ‣ The Woodlands is landlocked, with no room for growth, which will make crowding/traffic worse

• The most often mentioned complaint among the daytripper group was the price; a few in Group 2 also said The Woodlands is pricey
  ‣ Not enough moderately priced restaurants

• Other concerns included:
  ‣ The Woodlands becoming dated
  ‣ Infrastructure not keeping pace with number of people moving to The Woodlands
  ‣ Signage, it’s easy to get lost
  ‣ Businesses/restaurants close too early, especially during the week
  ‣ Internet coverage is weak
  ‣ Need more walkways/crosswalks between the Mall and Market Square area; dangerous
Visual Voice & Brand Personality
Images The Come To Mind

- Most predominant images had to do with water and trees, with water getting more mentions in Groups One & Two and trees being mentioned more often in Group 3
  - Mostly The Waterway area, but also pools, the lazy river, fountains, the lake
  - Many mentioned both water and trees; trees bring serenity, water is focal point
  - When asked if water image was more predominant than trees, some said yes while others said they had talked about trees/nature as best thing about The Woodlands
  - Water is around the shopping/dining areas, trees are more in the residential areas
  - Many trees have been removed by development
- Other images mentioned included:
  - Golf
  - Concerts
  - Relaxation/tranquility
  - Shopping
  - Dining
  - People having fun in Waterway Square at night
  - Market Street lights

Q=What pictures of images come to mind when you think of The Woodlands?
Colors Associate With The Woodlands

- Green (for the trees) was the predominant color mentioned by all three groups, followed closely in Groups 1 and 2 by blue (water)
  - Group 3 did not mention blue
- A few mentioned brown (tree trunks), gray (concrete), white (lights in trees), yellow (sunshine) and rainbow (full of happiness)

Q=Is there a color or colors that you associate with The Woodlands?
Favorite Memories

• Memories were mostly filled with small, intimate moments with loved ones:
  ‣ A kiss along The Waterway
  ‣ Watching the kids run around the open field at Market Street
  ‣ Walking barefoot on the hill of the Pavilion as the sun was setting
  ‣ Relaxing in a jacuzzi at the Resort in the winter
  ‣ Watching movies and eating s’mores with the kids at the pool
  ‣ Taking pictures with family around the singing Christmas tree
  ‣ Kayaking on the lake with my daughter and husband
  ‣ Sitting in the Adirondack chairs at Hughes Landing Point
  ‣ Strolling and talking with my daughter along The Waterway
  ‣ My father standing with the other vets being honored at the Memorial Day celebration, crowd cheering and applauding them, perfect Fireworks
  ‣ Dancing along The Waterway, right next to the swing-dancing septuagenarians
  ‣ Kayaking on Lake Woodlands and falling in—and not being able to get back in
  ‣ Watching kids lose their minds with fun on lazy river while adults relaxed and enjoyed each others company

Q=Describe your favorite memory that was created at The Woodlands. What lingers after you have visited?

“Christmas with family from out of town. Taking pictures around the singing tree, the amazing weather, dinner at PF Changs, followed by desert and a ride on the Waterway Cruiser.”

“Meeting up with my daughter, walking The Waterway from I-45 all the way back under the Grogan’s Mill Bridge to the Waterway Park area. Then on to Hughes Landing restaurant for a leisurely meal, followed by a stroll and conversation.”

“I can see the fountains in The Waterway Square all lit up at night. My daughter is playing in the fountains. People are dancing to live music and everyone is having a great time! Lots of laughing and singing.”

“Feeding the ducks at Northshore Park with my kids and watching their faces light up when the ducks ate our old bread!”
Lasting Impressions

- More important than the memories is what lingers after a trip to The Woodlands; visitors said they feel relaxed, peaceful, calm, happy, content, fulfilled and refreshed
- It’s like “a breath of fresh air!”

Q=What lingers after you have visited?

- “A city as perfect as the nature that surrounds it.”
- “It was just so peaceful to be among the trees and not feel the hustle and bustle of a large city.”
- “I had a great peaceful visit and came away refreshed.”
- “I feel very happy with my day.”
- “Refreshe, refueled, recovered!”
- “The ahhhh feeling.”
- “Peace and tranquility, relaxation.”
Brand Personality

Participants were asked to name a famous person, dead or alive, who most embodies the personality or spirit of The Woodlands.

- Across the board, all three groups tended to choose accomplished, classy people who have an air of casual, approachable sophistication—refined & relaxed
  - While some were “exciting,” “beautiful” or “glamorous” movie stars, others were more wholesome, fun and down to earth—or a combination of both

- There were also serious artists and deep thinkers among the chosen personalities, suggesting a complexity and degree of gravitas that is not always associated with master-planned communities (no hint or suggestion that it seems fake or manufactured)

- Perhaps the natural setting makes The Woodlands feel more organic; it’s much more than just a “superficial person with a pretty face”
Brand Personality

- **F. Scott Fitzgerald, Author:** Seems all glitzy and high end, very glamorous
- **John Wayne, Actor:** An adventure kind of guy
- **Cary Grant, Actor:** Classy. Gorgeous. But so funny and fun. Old school charm and class.
- **Robert Redford, Actor:** Classy but also outdoorsy
- **Robert Frost, Poet:** Layers and layers in his poetry. Uses nature to tell a story
- **Teddy Roosevelt, President:** Started the National Parks
- **Paul Bunyan, Lumberjack in American Folklore:** Woodsy
- **Ansel Adams, Nature Photographer:** Beautiful landscapes, poetry in motion
- **George W. Bush, President:** Relaxed and refined at the same time
- **Keith Urban, Musician:** Gorgeous, trendy, musical, stylish
- **Bruce Springsteen, Musician:** An American experience, but crosses all nationalities
- **Sean Connery, Actor:** Sexy, great looking. Distinct. Timeless. Universal appeal.
- **George Clooney, Actor:** Handsome, but seems approachable. Very upscale, has causes.
Brand Personality

• **F. Scott Fitzgerald, Author:** Seems all glitzy and high end, very glamorous
• **Princess Kate:** Classy but down to earth
• **Rachael Carson, Conservationist:** Preserved nature
• **Michelle Obama, First Lady:** Eloquent
• **Julia Child’s, Chef:** Classy, fun, natural
• **Taylor Swift, Musician:** Down to earth, small town girl who sells out The Pavilion
• **Ellen Degeneres, Talk Show Host:** Sexy, fun, entertaining. Caring. Someone everyone wants to be around.
• **Marilyn Monroe, Actress:** Just can’t get enough. Sexy & exciting, but quiet at times
• **Madonna, Singer:** Exciting, full of life. Still an amazing experience.
• **Kate Hudson, Actress:** Very upscale, but also builds houses & clean up after storm
• **Gweneth Paltrow, Actress:** Conveys herself as very natural-living, yet very classy
Competitors
Other Destinations Consider

- San Antonio (8), Austin (7) and Galveston (6) were the primary considerations for other short overnight trips or getaways for participants in Group One
  - Dallas, Houston and New Orleans got a few mentions each
- Group Two’s list was a bit more scattered, with Austin (5) and Galveston (3) getting the most mentions
  - Branson, Biloxi, Gaylord, New Braunfels, Port Aransas, San Antonio and Vegas were each mentioned once
- Daytrippers had an entirely different set of alternative destinations with Kemah (11) and Galveston (8) topping the list
  - Conroe was mentioned by 4 participants
  - Other shopping venues such as Katy Mills Mall, Memorial Mall, the Galleria and the outlets also received several mentions
Similar Destinations

• Most participants from the local area (Groups 1 & 3) said San Antonio with its Riverwalk and resorts offers a similar type of experience to The Woodlands; more of a big city feel, but come away feeling relaxed, have a variety of dining and entertainment options,
  ‣ Other cities mentioned in Group One included: Austin, Kemah, New Orleans, niche/more upscale parts of Dallas or Houston, San Marcos and certain areas of Miami
  ‣ Group Three included towns in the Texas Hill Country, Galveston, Grapevine, San Diego, Kemah, Bellevue, WA, and the Santa Monica promenade

• In Group Two, Austin was thought to offer similar experiences
  ‣ It’s woodsy, has lakes and beautiful scenery, restaurants, shopping, concerts
  ‣ Gaylord resort in Grapevine, Marshall, San Antonio, Branson, Pacific Grove, CA and Pigeon Forge, TN also received one mention each

• At least one participant in each group said there isn’t a comparable experience

Q: What other destinations offer a similar experience to The Woodlands?

“Other Texas cities are either nature OR sophistication. Not both.”

“The Riverwalk offers the same type of experience but it’s more of a big city feeling, not naturally beautiful.”

“Closest in my experience is the quieter part of the San Antonio Riverwalk extension, near where the old brewery used to be. But honestly, I’ve never found anywhere that’s quite as unique as The Woodlands.”

“Austin has some similarities...woods, trees, lakes, water, nature. It offers restaurants, concerts and shopping too.”

“Both the Kemah Boardwalk and Galveston Strand have unique dining and shopping opportunities with a little bit of ambience.”
Improvements
Add To Infrastructure

- Group One had three ideas, with one of them being to do nothing; it’s perfect as it is and doesn't need to get more crowded
  - Provide a view of The Woodlands from above to see lights, layout and nature
    - Build a tower like the Reunion Ball or Tower of Americas with a restaurant
    - Add a restaurant at the top of a tall building or outdoor deck on top of the Marriott
  - Improve transportation to and from and around The Woodlands
    - Expand trolley routes and hours of operation
    - Transportation to and from airport and into downtown Houston

- The most talked about suggestion in Group 2 was the addition of a winery
  - A few people mentioned integrating the trees more into public areas, not just serve as a backdrop
  - Also mentioned restaurant at the top of a skyscraper, more unique or foreign/cosmopolitan restaurants
  - More antique stores
  - Artists’ work area and shops
  - Extend trolley to Spring, TX
  - Host murder mystery cruise on The Waterway
  - Outdoor nature/water activity area

“Nothing else will fit...adding too much more of anything will crowd it more.”
“A restaurant on top of one of the skyscrapers would be spectacular!”
“Winery in The Woods. Love it!”

“Keep the infrastructure how it is. Great, woody roads, trails, waterways, the trolley and water taxis are all perfect.”
“Make the trolley go to all the different areas so they can experience all of The Woodlands and not just the front part.”
“More areas of trees and activities combined. Don’t just put a field in with a patch of grass and lights and a few plants!”
“Visited the U.S. National Whitewater Center in Charlotte. It has man-made white water rafting, zip lining, ropes courses, rock climbing, mountain biking, kayaking and food all in one place. Would be very good tourist attraction with local interest as well.”

Q: What could The Woodlands add to its infrastructure that would make it more attractive to leisure travelers?
Add To Infrastructure

• Group Three had a hodge podge of suggestions, including several that were mentioned in the other groups
  ‣ Expand trolley (to Creekside and the Marriott resort)
  ‣ Train to/from Houston and Dallas
  ‣ Boutique hotel
  ‣ Family amusement park
  ‣ Outdoor movies or drive-in movie theater
  ‣ Boardwalk-type game area
  ‣ Ferris wheel
  ‣ Expand activities on The Waterway
  ‣ Dining on the water on a boat
  ‣ Better/more consistent Internet coverage
  ‣ More walking paths connecting different areas
  ‣ More places for kids to play
  ‣ A climbing wall
  ‣ More affordable hotels and casual dining restaurants

Q: What could The Woodlands add to its infrastructure that would make it more attractive to leisure travelers?

“What about some type of Boardwalk games area? That would be so fun at night!”

“Maybe add a ferris wheel overlooking The Waterway would be cool—like the one in Vegas.”

“A good family amusement park! Houston is sorely lacking in big family entertainment since AstroWorld closed.”
Ways To Better Serve Leisure Visitors

- Most of the suggestions had to do with making The Woodlands more affordable
  - Discounts for frequent visitors or area residents, end of summer discounts, package deals
- Want to be able search for ideas/itineraries by type of trip or adventure they are looking for (i.e. foodies, nature lovers, shopping, sports, kids activities, couples, etc.); offer different types of tours/packages
- Many of the stated information needs are already being produced, suggesting visitors don’t know what’s available
  - Woodlands magazine mailed to homes with restaurants, activities, events
  - Map with attractions/things to do
  - Comprehensive hiking/biking trail map
  - More information on activities with full calendar of events
  - Emails with timely events (with opt-in to specify what type of info want to receive)
  - Updates on new restaurants, retail, events
  - Parking information (beyond just Market Street and hotels)
  - Suggested itineraries

Q: How could The Woodlands Better Serve You? What information would you like to have about The Woodlands that you don’t currently have?
Aha! Moments
What’s Unique & Different About The Woodlands

- Close to major city, but feels a world away; a true escape
- Combination of things to do, nestled in nature
  - Beautiful serene setting, without sacrificing sophistication—both relaxed and refined
  - Shopping, dining, outdoor activities, concerts, events, spectacular golf courses, The Waterway—there’s always something fun and exciting going on
- Many activities are in close proximity to each other, very accessible, convenient and walkable (not a lot of in and out of car, parking hassles)

What Customers Want/Need

Meeting Planners
- Make their job as easy as possible (planning, meeting logistics, execution, great service)
- Need availability with close-in dates
- Work within their budget/flexibility/options
- Destination that attendees will be excited about
- Safe destination

Leisure Visitors
- Relax, recharge
- Be entertained, experience something new/learn
- Make memories
- Less is more: less packing, less planning, less stressful
Appendix
Profile of Respondents Online Survey

Gender & Presence of Children in Household

- Majority of respondents were female
- Almost half of resident respondents have children vs. 34% of visitors
Profile of Respondents Online Survey

Average age of visitor respondent was 48.7 years old vs. 46.5 for resident respondents.
Profile of Respondents Online Survey

Household Income

- Respondents who live in Montgomery County were more affluent than those who visited the community.

LOOK UP DIFF BETWEEN DAY AND OVERNIGHT VISITOR
Residents Online Survey

- 22% lived in the area 5 years or less; 26% 6-10 years; 52% 11+ years
- 26% commute to work outside of Montgomery County
  - 22% 30 minutes or less
  - 34% 31 to 45 minutes
  - 26% 46 to 60 minutes
  - 19% more than 1 hour
- 33.5% of families said they have taken a “staycation” in The Woodlands, where they stayed overnight in a local hotel; 35-44 year olds most likely to have done this (44%)

Montgomery County Respondents’ Zip Codes

- 77354: 28%
- 77380: 10%
- 77381: 5%
- 77382: 5%
- 77384: 6%
- 77385: 21%
- Other: 25%

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