

Image and Brand  
Research  
March 2022



 insights  
Strategic Marketing and Research

# Background & Objectives

During discussions regarding the New Hampshire travel brand, a variety of questions and issues arose that suggested the need for a high-level brand assessment. Among the prevailing questions are the following:

- What do people think about New Hampshire from a travel perspective?
- What is unique about the state?
- How is it differentiated from Maine and Vermont?
- What does “Live Free” communicate?
- Are there differences in perspective between nearby and more distant markets?
- What perceptions would motivate travelers?
- Is variety within proximity motivating?
- Who does New Hampshire want to attract?

While SMARInsights has reviewed the detailed image of the state compared to competitors in prior research, the broader image perceptions that result from qualitative feedback is the type of context that was needed. But instead of focus groups, SMARInsights conducted a quantitative survey effort among leisure travelers designed to capture open-ended qualitative input. Specifically, the survey addressed:

- Travel motivations
- Ideal New England trip collaging and descriptors
- Image of New Hampshire – open ended plus video open ends
- Positioning association (themes and states)
- Live Free messaging/appropriateness
- Classificatory information

# Overview

- The overall approach of this research was to attempt to gain a greater understanding of traveler perceptions by breaking the paradigms of measurement.
- In past studies, we have continually assessed New Hampshire in terms of attribute ratings in existing markets.
- In this research, we instead sought to identify traveler motivations, New England perceptions, and New Hampshire differentiation through alternative lenses of imagery and description exercises.
- The goal is to understand both what the state's image is in current and future markets and where the opportunities for growth lie.

# Methodology

- The survey was conducted online so that respondents could view and react to the images.
- The survey included open-ended video responses to collect qualitative feedback in the quantitative survey environment. Excerpts of qualitative feedback are provided as part of this report.
- A total of 1,798 surveys were completed in February 2022 among leisure travelers in the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.

Market	Completed Surveys
Existing Target Markets	393
New York	302
Expansion Target Markets	805
Fly Market (Chicago)	298
<b>Total</b>	<b>1,798</b>



# The Images

This set of images was tested for:

Which would be included in the ideal New England trip?

What words describe the images?

Which state comes to mind for each?



Barrington  
Country Store



Boston



Canoes by lake



Cape Cod  
Lighthouse



Cape



Covered Bridge



Fall Town



Foliage



Gloucester



Hampton



Hanover



Hiking Family



Hiking



Hotel



Jeep



Kayaking - Lake



Kayaking - River



Maine Lobster  
Roll



Motorcycles



Portsmouth



Robert Frost  
Historical  
Landmark



Seaside Dining



Shelburne  
Museum  
Outdoor Concert



Ski Picnic



Snow Skiing



Tent



Tree House



Vermont  
Summer  
Landscape



Wang Theatre



Winter Panorama

# The Descriptors

This set of descriptors was tested for:

Which describe the ideal New England trip?

Which describe the images?

Which state comes to mind for each?

Beachy	Authentic	Trendy	Calm	Charming
Luxurious	Colorful	Upscale	Natural	Hip
Mountainous	Comfortable	Vibrant	Fast paced	Outdoorsy
Adventurous	Expensive	Fresh	Active	Exquisite
Resorty	Laid-back	New	Relaxed	Enchanting
Variety	Rejuvenating	Free	Friendly	Historical
Quaint	Sophisticated	Open	Inspiring	Inviting
Sustainable				

# Insights

- Maine and Vermont are clearly positioned and differentiated as coastal and mountainous, respectively. In this context, New Hampshire's image is less clear.
- Among past visitors and in existing markets, the state is seen as a predominantly outdoor destination.
- Beyond this current franchise, the state has little image and is undifferentiated.
- New England as a leisure destination has a variety of appeals that factor into three distinct groups: outdoor, relaxing, and quaint.
- The existing markets want an outdoor New England. Expansion markets have nearby alternatives for relaxing and outdoor activities and as such desire a quaint New England.
- With Maine and Vermont already having strong images across markets, in expansion markets there is an opportunity for the state to occupy the quaint position and become the paradigmatic New England destination.
- These positioning determinations should be made in the strategic context of who we want to visit the state. Positioning as quaint would bring older visitors to the charming towns. Promoting the outdoor assets stresses those areas. Considerations like sustainable tourism may focus on younger outdoor-oriented regional markets.

# New Hampshire Image

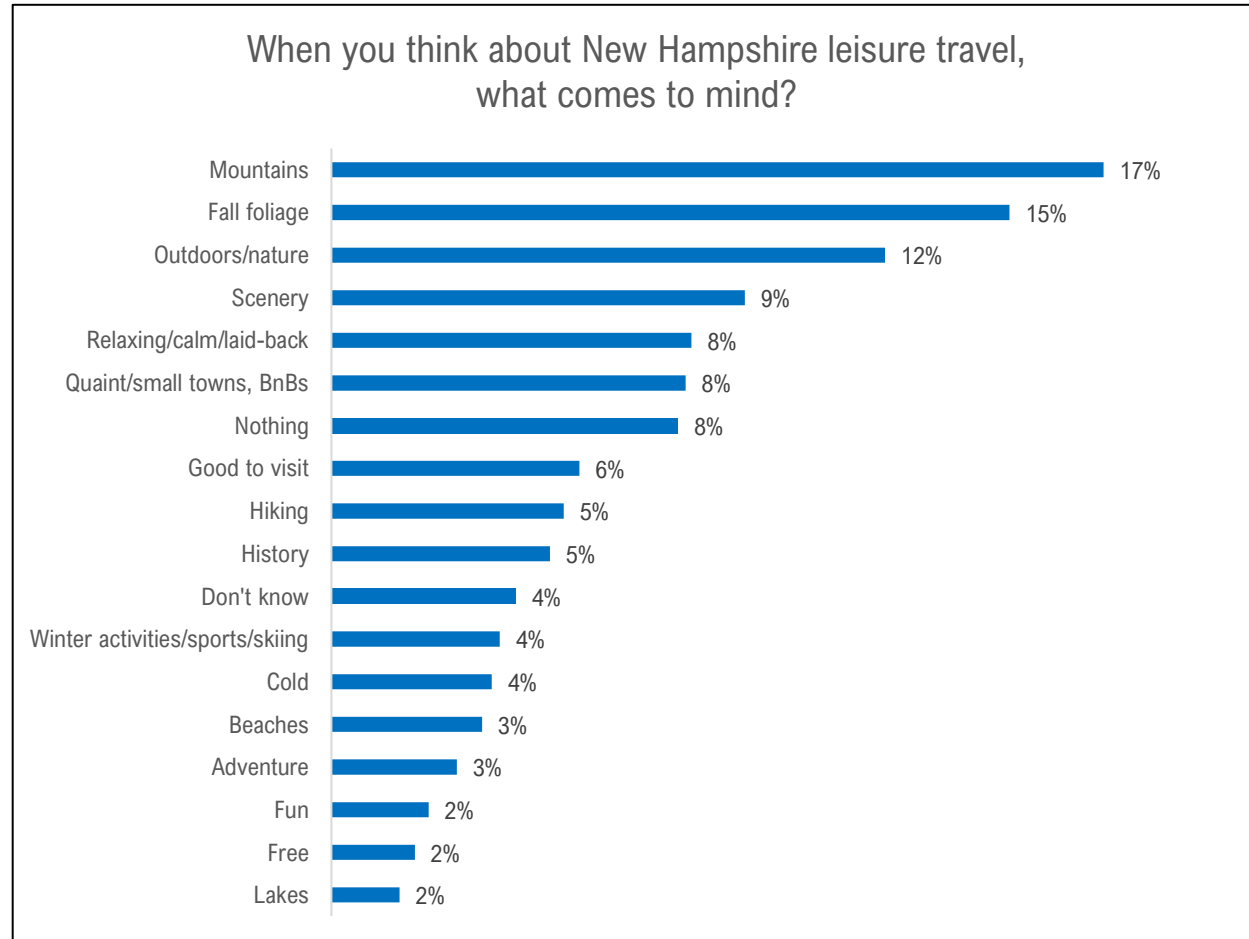


# Image Considerations

- It is important to recognize that New Hampshire's prevailing image as a leisure destination is a function of a variety of influences.
- Certainly, the marketing efforts of the state are important, as are experience and proximity.
- That being said, we need to view the state's image through a variety of lenses to understand the true fabric and complexity of this issue.

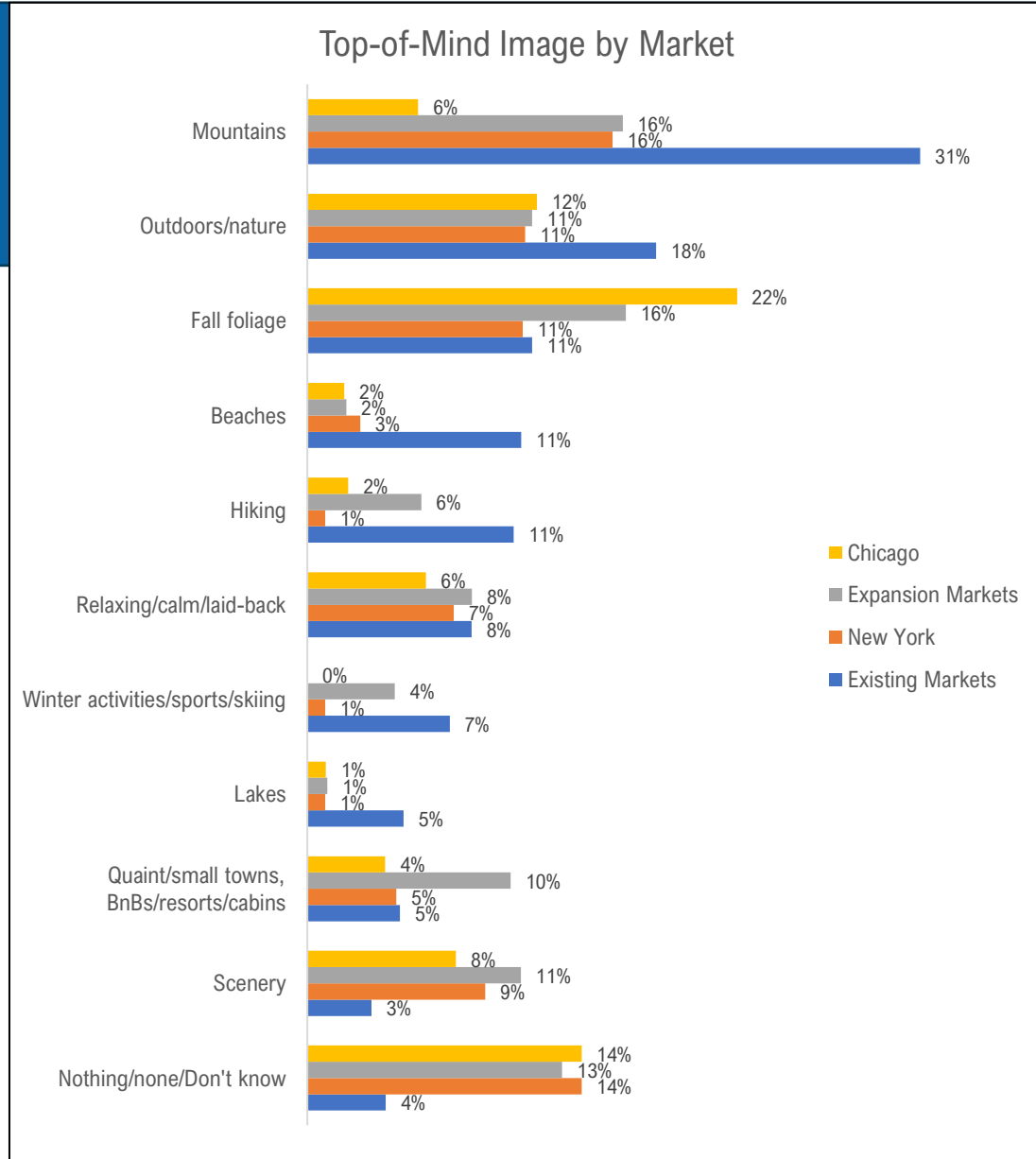
# New Hampshire Top of Mind Image

- When considering the overall sample, the top-of-mind image of New Hampshire reflects the general outdoor focus and tone of the marketing.
- That is, the state on an open-ended basis is a beautiful outdoor destination with mountains, nature, scenery, and foliage.



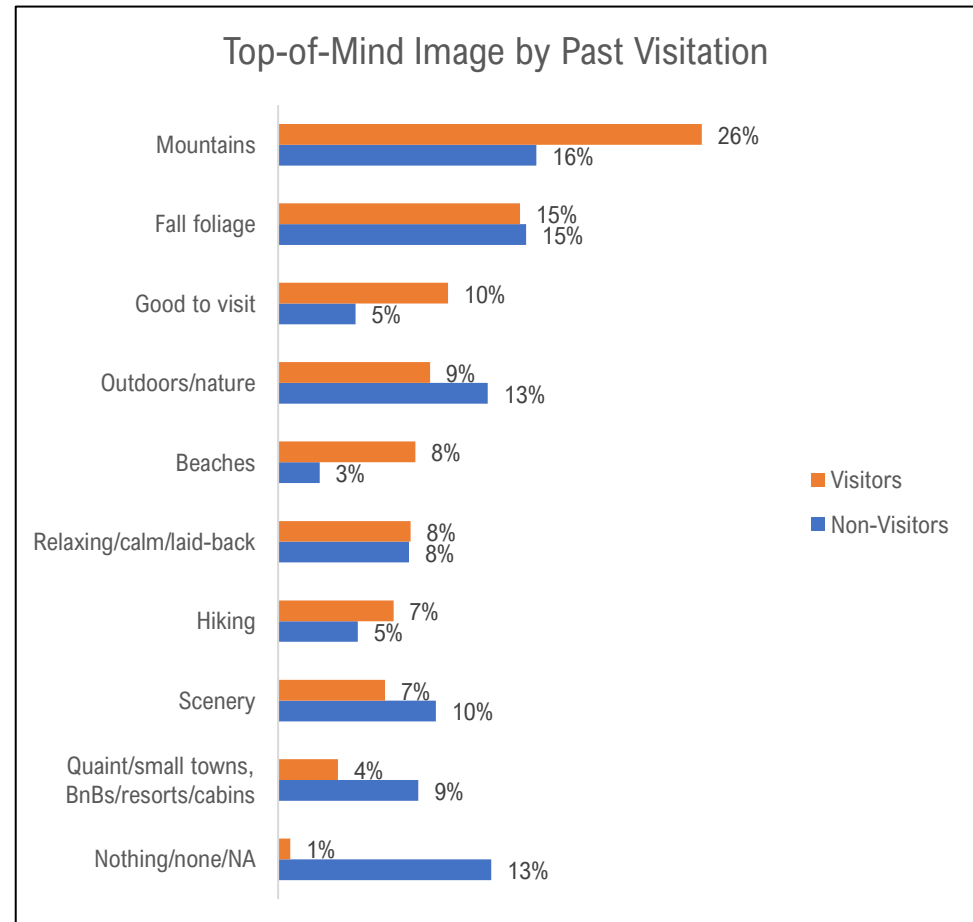
# Top-of-Mind Image by Market

- When these same open-ended responses are considered by market, the results are drastically different.
- The outdoor beauty image of the state is driven by the existing markets.
- Outside of the existing markets, the image is vague at best, and more likely “nothing.”
- It is important to note that this open-ended assessment followed an assessment of what an ideal New England trip would be like and many of these terms and images had been discussed. This no doubt had the impact of planting a seed of some image for the state. But overall, many travelers were still drawing a blank.



# Top-of-Mind Image by Past Visitation

- In a similar fashion, we see the same kind of differentiated results between those who have visited New Hampshire and those who have not.
- While the visitors focus on the mountains, the non-visitors simply parrot some of the New England imagery. If this had been done without those prompts, it seems likely that “nothing” would get an even greater portion of responses.
- Although it is interesting that “quaint” receives more mentions among non-visitors than visitors.



# New Hampshire Top-of-Mind Image Video Responses

Some of the flavor of the perception of New Hampshire as a leisure destination can be captured by virtue of video responses to this open-ended question.







# Word Association and Markets

	Existing Markets	Other Markets
Adventurous	140	93
Mountainous	136	94
Free	135	94
Outdoorsy	131	95
Active	129	95
Variety	127	96
Colorful	127	96
Fresh	97	101
Relaxed	96	101
Exquisite	93	101
Luxurious	91	102
Calm	88	102
Sophisticated	88	102
Expensive	81	103

- As we have seen, familiarity and experience matter.
- When we consider the difference between the word association results in existing markets and the other markets, these differences are relatively clear where the association is indexed against the overall.
- In existing markets, perceptions skew to the positioning adopted in the marketing of adventurous, mountainous, outdoorsy, and free.
- In contrast, those outside of the existing markets are more likely to associate New Hampshire with expensive, sophisticated, and luxurious.
- This association, again, may be more a function of what is not seen as the stronger image of either Maine or Vermont.

# Differentiation

- In prior image research, one thing that has been consistently seen is that there is a strong similarity in imagery of these three states. As such, in certain regards the key question has become what makes New Hampshire different from Vermont (in simplistic terms, New Hampshire's image has been characterized as *Vermont Lite*).
- As such, one challenge in this research was an attempt to tease out the differences between the states to help understand strength and potential.

# New Hampshire Differentiators

- When asked on an open-ended basis the differences between New Hampshire and Vermont and Maine, nearly half of all respondents could not identify a difference.
- Importantly, this non-differentiation prevailed regardless of geography – even a third of those in the existing target markets came up empty. It is only visitors who see some differences, and those tend to be subtle.
- Vermont and Maine have clear images, and travelers aren't sure how New Hampshire is any different. This is a testament to the lack of a prevailing image for Vermont – a blank slate, if you will.
- ***The opportunity this affords is that you can be almost anything.***

	Overall	Non-Visitors	Visitors	Existing Markets	Other Markets
<b><i>Don't know / unsure / not sure</i></b>	<b>31%</b>	<b>37%</b>	<b>4%</b>	<b>15%</b>	<b>34%</b>
<b><i>No differences / about the same</i></b>	<b>15%</b>	<b>16%</b>	<b>11%</b>	<b>18%</b>	<b>14%</b>
More to do / different activities and sights	5%	5%	10%	6%	5%
Nature / outdoors	5%	4%	10%	7%	4%
It's better / good / nice	5%	3%	11%	3%	5%
Relaxed / slow pace	4%	3%	8%	5%	4%
Culture / people / politics	3%	3%	4%	3%	3%
Mountains	3%	2%	5%	7%	2%

# New Hampshire Differentiators Video Responses



# Ideal New England Trip

# Ideal New England Trip Characterization

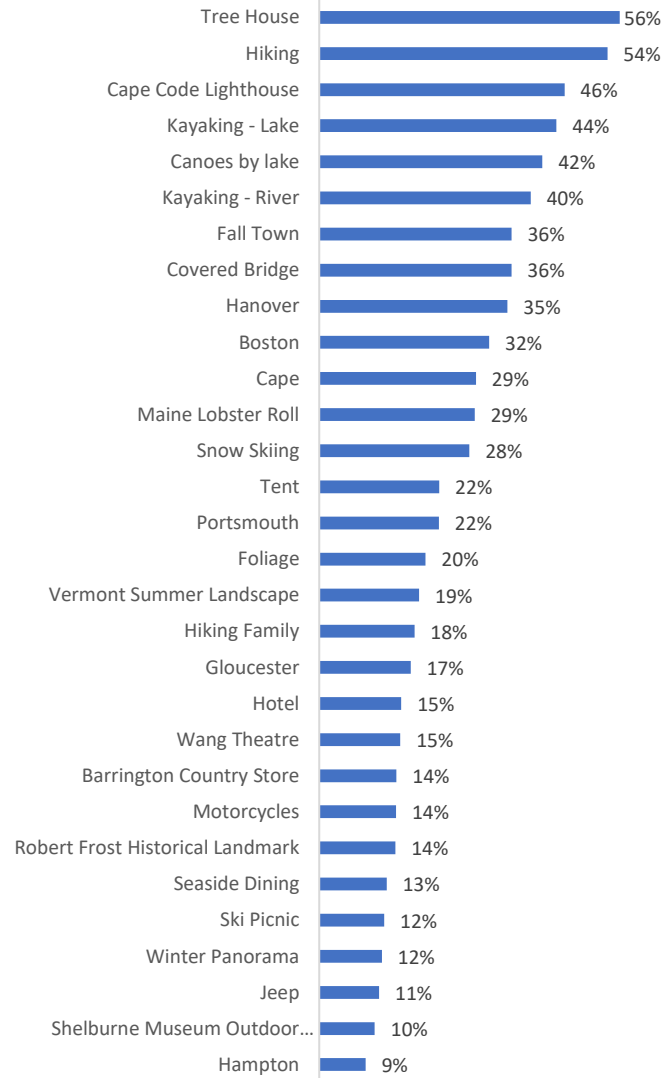
- As the potential of expanding into new markets has been explored and discussed, the relationship between the image of the state and the image of New England has consistently emerged.
- The working assumption was that while people may not have a clear image of New Hampshire, they probably have some perception of New England as a whole.
- As such, to help explore this issue further, one focus of this research was to understand what travelers felt an ideal New England trip might be.
- We explored this using imagery and descriptor collage exercises.



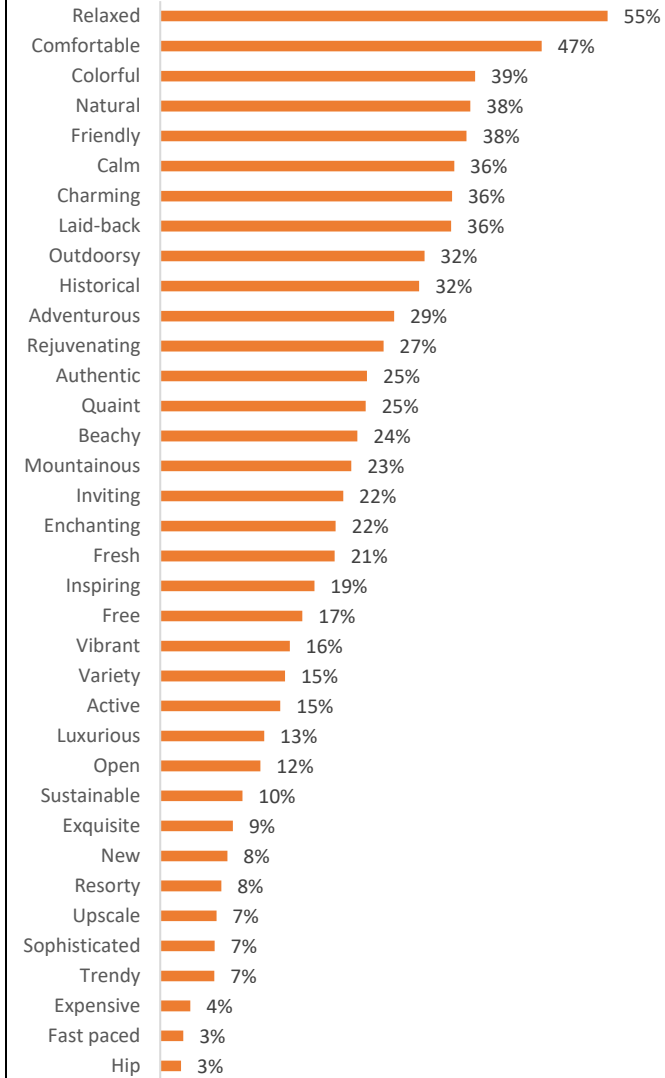
# Ideal New England Trip Overview

- The overall image of an ideal New England trip based on the images and words selected could be summarized as dramatic nature, water, and quaintness in a relaxed, comfortable, colorful, friendly, and charming manner.
- When analyzing a multiplicity of data such as this the most valuable approach is to explore how things “move” or factor together.
- Interestingly, this type of analysis performed on both the imagery and words did little to group these elements. This is indicative of several considerations – the simplest are there was a great deal that was found appealing and people like lots of different types of experiences.

### Ideal New England Trip Images



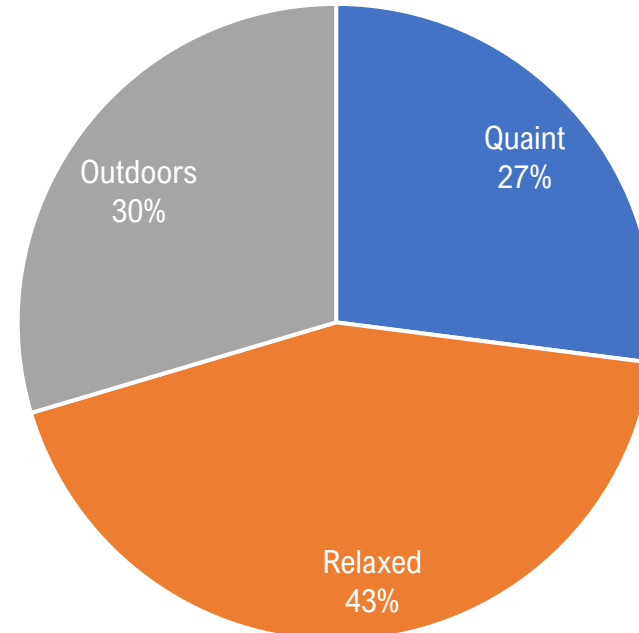
### Ideal New England Trip Descriptors



# Ideal New England Trip Types

- In order to address this and attempt to better characterize the types of trips desired by respondents, three underlying dimensions were uncovered in the data. This was done through an iterative factor analysis identifying the most differentiating appeals.
- The resulting three trip types are roughly equally distributed in the sample with the largest percentage imagining a relaxed trip.
- Next, consider the characteristics of these three ideal New England experiences.

Ideal New England Trip Types

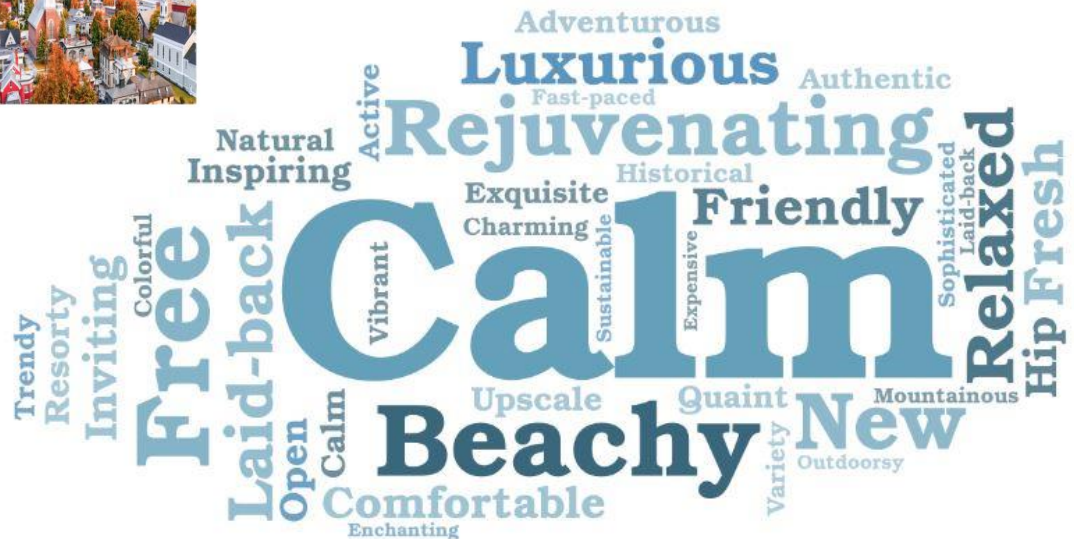


# Relaxed New England Trip



Trip Motivations
Have no responsibilities
Relax
Enjoy a beer/cocktail/glass of wine
Rejuvenate or recover from the stresses of daily life
Visit nightclubs or bars
Reconnect with family or friends
Just to do what you want

- A relaxed New England trip is quiet and calm and rejuvenating. The imagery is all peaceful and the motivations are essentially to escape and recharge.



# Outdoor New England Trip



- The ideal outdoor New England trip shares the same beautiful scenery with a relaxed trip, but is decidedly more active in motivation, experience, and feel.

Trip Motivations
Go hiking or biking
Go camping
Enjoy outdoor activities
Have an adventure





# Quaint New England Trip



Trip Motivations
Visit historic sites
Visit art or cultural museums
Visit charming/quaint places
Go shopping
Feel pampered
Have unique dining experiences
Experience the local flavor

- The quaint New England trip, which is the smallest of the three, is probably the most differentiated with more of an experience of place and culture than the relaxed or outdoor trip.



# Trip Type Characteristics

- These different types of ideal New England trips are quite similar demographically. They all have the same portion of married couples, education level, and income.
- The most significant difference was in terms of age with those seeing the ideal trip as quaint being significantly older (and consequently fewer couples with kids) than the outdoor-oriented segment, which was younger and slightly more male.
- Interestingly, there was also a geographic skew. In the nearby existing markets, New England is more strongly associated with an outdoor experience. However, in the other markets *quaint* has stronger resonance. In part this may simply be that it is more of a differentiator for New England. If you live in Ohio, outdoors could be Michigan. But if you want New England charm, it can only be found there.

	Quaint	Relaxed	Outdoors	Total
18-34	23%	44%	33%	100%
35-54	24%	46%	30%	100%
55+	34%	40%	25%	100%
Existing Markets	23%	41%	36%	100%
Other Markets	28%	44%	29%	100%



# New England Travel Motivators

- Ultimately, the issue here is how to optimally position New Hampshire. So, the question becomes how to differentiate the state in a way that will motivate trips. The former needs to be viewed in context – and we have already seen that New Hampshire’s current image is limited, which allows re-positioning. Given this, a key question to focus on is what motivates New England travel.
- However, it is important to recognize that New Hampshire’s image may need to be different in different markets. The outdoor positioning is less motivating for people outside of the existing markets.
- To help assess motivators, we looked at the reasons for traveling among those outside of the existing markets who were interested in visiting New England.
- ***The results suggest motivators like those central to the quaint New England trip – seeing a beautiful, different, quaint locale.***

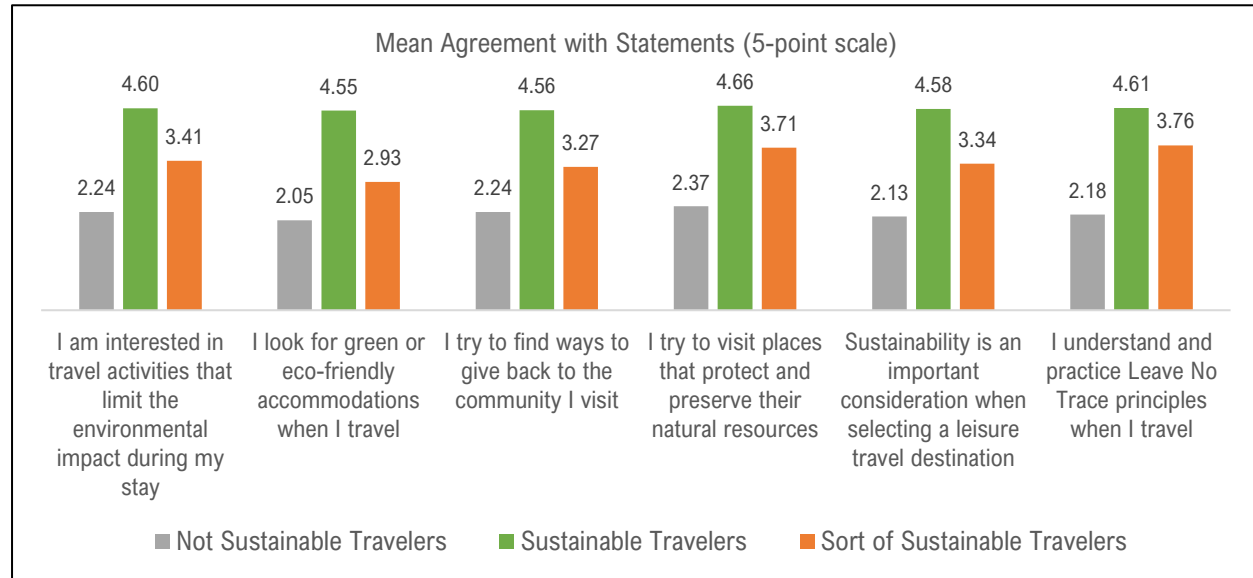
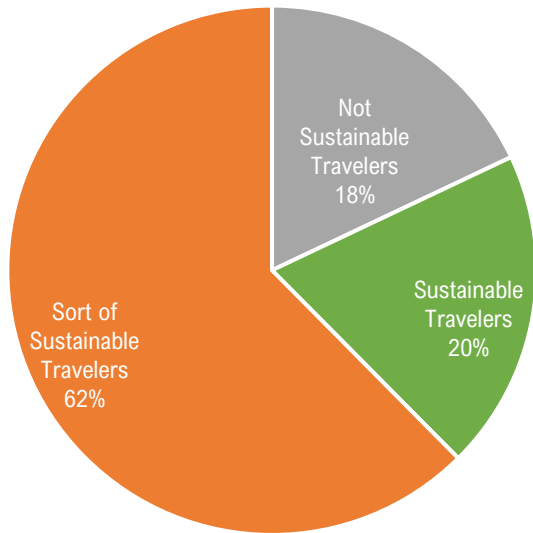
Travel motivators among those outside of the existing markets who are interested in New England Travel	
Enjoy beautiful places	4.67
Relax	4.63
Rejuvenate or recover from the stresses of daily life	4.53
See or do something new and different	4.50
Experience the local flavor	4.46
Visit charming/quaint places	4.46
Enjoy outdoor activities	4.45
Have an adventure	4.44
Take scenic drives	4.44
Visit historic sites	4.39

# New Hampshire as Quaint



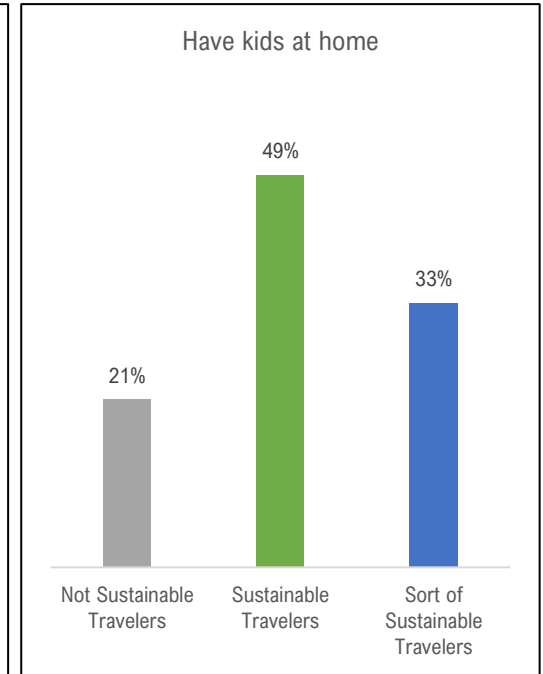
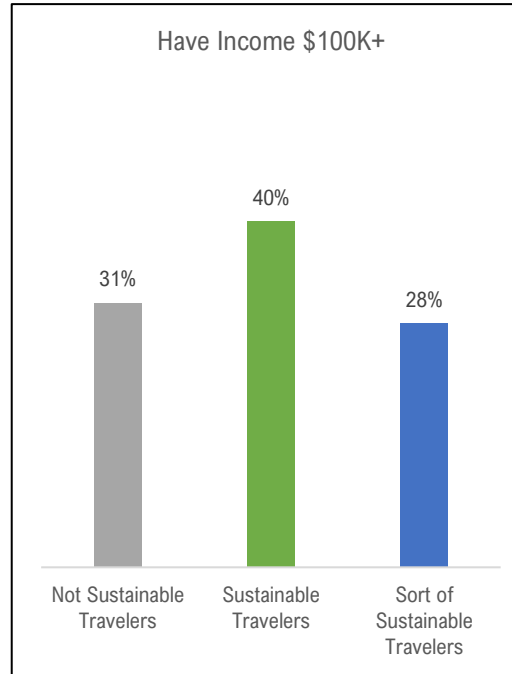
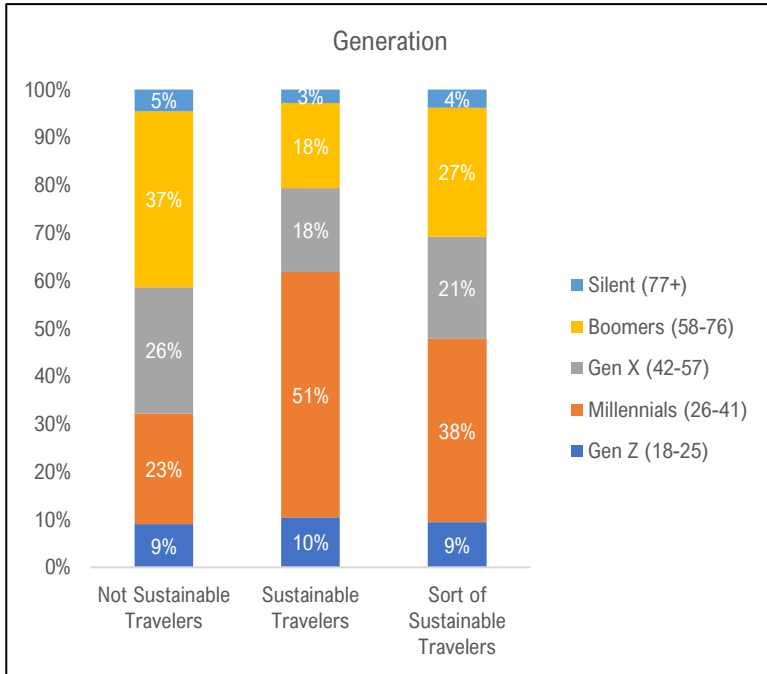
# Sustainable Travelers

# Sustainable Travelers Overview



- Respondents were classified into “sustainable traveler” groups based on their agreement with a series of statements shown in the column chart.
- 1-in-5 travelers are classified as sustainable travelers based on strong agreement with all these statements. The largest group is the “sort of sustainable traveler,” who agrees with these statements but less strongly.

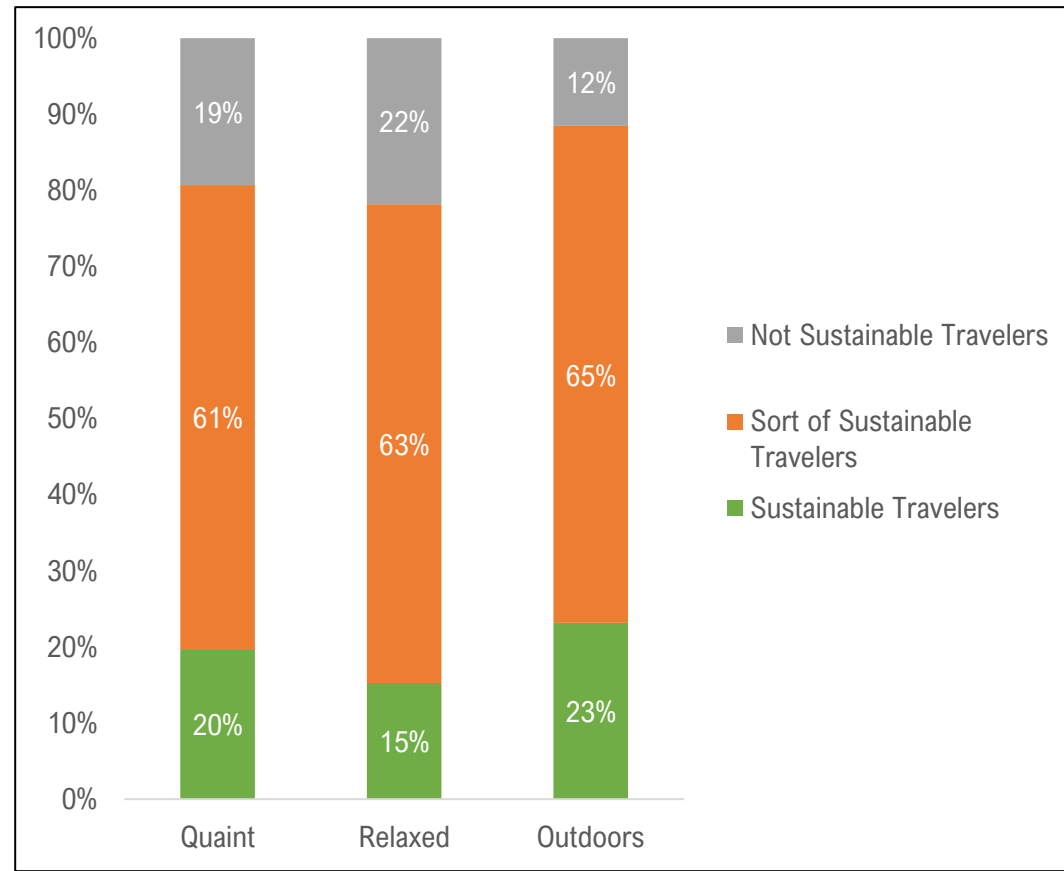
# Sustainable Travelers Demographics



- Sustainable travel practices are associated with youth, affluence, and having offspring.

# Ideal New England Trip by Sustainable Travelers

- Perhaps the most important consideration regarding sustainable travel is how it relates to the ideal New England trip types.
- We previously identified opportunity to market New Hampshire as a quaint New England destination, especially to the newer/more distant markets. Those who desire a quaint New England trip are 20% sustainable travelers and a combined 81% “sort of” or “full” sustainable travelers. And they are more sustainable than the relaxed group.
- So, a desire to attract sustainable travelers is not in conflict with attracting those who desire quaint New England.

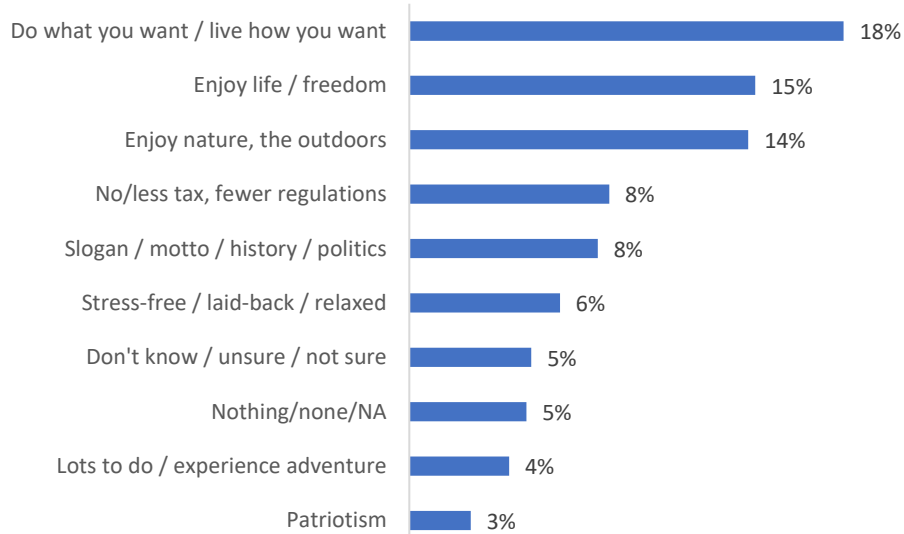


**“Live Free”**

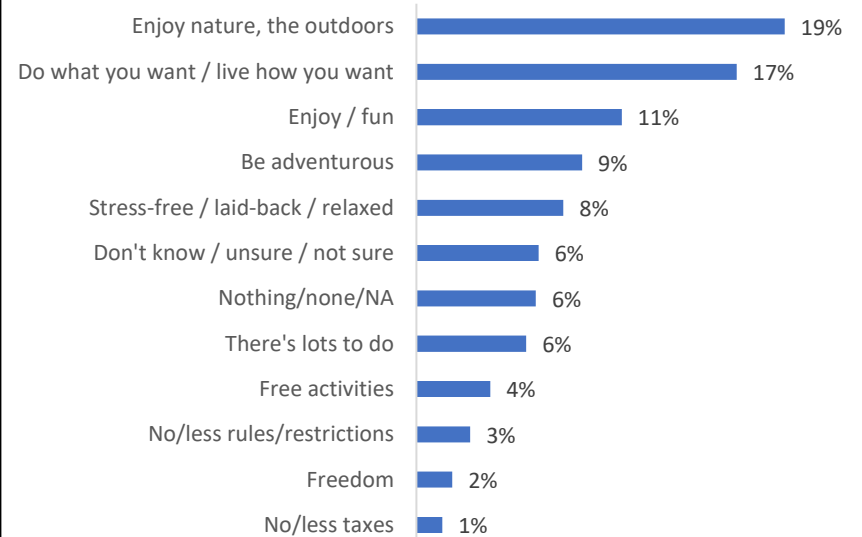
# What does 'Live Free' mean?

In addition to assessing the image of the state and its relative appeals and positioning alternatives, this research effort included an open-ended exploration of the “Live Free” line – its meaning and appeal. For the most part, the focus was on free and freedom and ranged from just do what you want, to no government restriction or taxes to patriotism.

What does 'Live Free' mean



In terms of travel, What Does 'Live Free' Mean





# Live Free Video Responses



# Appendix: Questionnaire

# Questionnaire

New Hampshire Tourism  
Brand & Image Research Questionnaire  
January 2022

SCREENERS

S1. What is your postal/ZIP code? \_\_\_\_\_

S3. Who in your household is responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE

S2. Please indicate if each of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		
<i>The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your travel behavior under normal circumstances</i>		
(IF =0, TERMINATE AFTER SCREENING QUESTIONS)		
I use video streaming services like Hulu or Netflix		
I like to travel during the fall to view the changing leaves		
I engage in skiing, snowboarding, and/or other winter activities		
I am currently planning or have already planned an upcoming leisure trip		

S4. What is your age? \_\_\_\_\_ TERMINATE under 18

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

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$125,000
- \$125,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more

ethnicity. Which of the following best describes your racial and ethnic heritage? Are you...?

Select all that apply.

- African-American/black
- Asian/Pacific Islander
- Caucasian/white

- Mixed ethnicity
- American Indian
- Other, please specify \_\_\_\_\_)

Ethnicity? Do you identify as Hispanic or Latino?

- Yes
- No

S5. Please indicate how much you agree that each of the following applies to your leisure travel.

[ROTATE]	Strongly disagree 1	2	3	4	Strongly agree 5
I often visit national parks while traveling for leisure					
I am interested in travel activities that limit the environmental impact during my stay					
I look for green or eco-friendly accommodations when I travel					
I try to find ways to give back to the community I visit					
I try to visit places that protect and preserve their natural resources					
Sustainability is an important consideration when selecting a leisure travel destination					
I understand and practice Leave No Trace principles when I travel					

# Questionnaire

1. The reasons people have for taking leisure trips vary widely. Some travel for particular experiences, some look for a feeling, while others take trips for specific activities. The list below represents a wide range of experiences, feelings, and activities that may or may not be important to you. For each of these, please indicate how much each of these is something you look for in your travels.

Not at all important	Not important	Neither important nor unimportant	Important	Very important
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- Just to do what you want
- Have an adventure
- Escape
- Feel pampered
- Unplug
- Relax
- See or do something new and different
- Reconnect with family or friends
- Visit the ocean or beach
- Visit historic sites
- Listen to live music
- Visit art or cultural museums
- Have no responsibilities
- Visit amusement or theme parks
- Golf
- Enjoy beautiful places
- Go hiking or biking
- Enjoy outdoor activities
- Go camping
- Visit nightclubs or bars
- Go shopping
- Gamble
- Have unique dining experiences
- Attend fairs or festivals
- Attend sporting events
- Experience the local flavor
- Take scenic drives
- Enjoy a beer/cocktail/glass of wine
- Rejuvenate or recover from the stresses of daily life
- Relive an experience from your past
- Visit charming/quaint places
- Sustainable travel activities

Q2.

Please take a moment to review these 30 images. Thinking about your ideal New England leisure trip, please select the images that best represent that trip. Click on an image to select it. You may select up to 10 images. If you want to unselect an image, just click on it again.

I:\Ads Master\New Hampshire\2022\DTTD 2022 SMARI Images

Beach Lake



Canoes by lake



Cape Cod Lighthouse



Hampton



Maine Lobster Roll



Seaside Dining



Ski Picnic

Culinary

Culture



Shelburne Museum Outdoor Concert



Wang Theatre

Hiking



Hiking Family



Hiking Green Mountains

History



Gloucester



Robert Frost Historical Landmark

Kayaking



Kayaking - Lake



Kayaking - River

Landscape



Cape



Covered Bridge



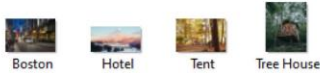
Vermont Summer Landscape



Winter Panorama

# Questionnaire

## Lodging



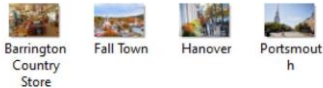
## Road Trip



## Skiing



## Towns & Shopping



2. Now, please select the words that best describe this perfect New England leisure trip. You may select up to 10 words. INSERT LIST OF WORDS.

Beachy	Authentic	Trendy	Calm	Charming
Luxurious	Colorful	Upscale	Natural	Hip
Mountainous	Comfortable	Vibrant	Fast paced	Outdoorsy
Adventurous	Expensive	Fresh	Active	Exquisite
Resorty	Laid-back	New	Relaxed	Enchanting
Variety	Rejuvenating	Free	Friendly	Historical
Quaint	Sophisticated	Open	Inspiring	Inviting
Sustainable				

3. Please pick up to 3 words that best describe this image. SHOW CAROUSEL WITH EACH IMAGE AND ENTIRE LIST OF WORDS ON EACH SCREEN.

5

4a. Have you traveled to or within any of the following states for a leisure trip in the past five years? How many trips did you take to or within each state in the past five years?

[ROTATE]	States visited in the past five years	Number of visits in the past five years
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

4b. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

(ROTATE BETWEEN Q4-Q7 AND Q10-Q11)

INVITATION FOR VIDEO OPEN ENDS: You have been selected to provide video responses to the next few questions. Your recorded responses will provide valuable input! If you do not wish to provide a video response, you may simply type your answers. Which do you prefer?

Record video responses  
Type responses

IF CHOOSE VIDEO, SAY: Thank you. Here are some things to remember as you provide your responses:

- Please make sure that your camera and microphone are turned on.
- You must click the record button to begin recording. It will be a red button below the video screen.
- Please take no more than 45 seconds for each video.
- Please review your first video to be sure that you can be seen and heard.
- Please make sure you submit each video.
- You must record and upload each video before you are able to move on to the next question

4. When you think about New Hampshire leisure travel, what comes to mind?

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5. How would you describe New Hampshire to a friend as a leisure travel destination?

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6

# Questionnaire

6. What would a leisure trip to New Hampshire be like?

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7. How is New Hampshire different from other New England states like Maine and Vermont?

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8. Which of these states comes to mind when you see each of these images? SHOW CAROUSEL WITH EACH IMAGE AND LIST OF NEW HAMPSHIRE, VERMONT, AND MAINE ON EACH SCREEN.

9. Which of these states comes to mind when you hear each of these words? SHOW CAROUSEL WITH EACH WORD AND LIST OF NEW HAMPSHIRE, VERMONT, AND MAINE ON EACH SCREEN.

INVITATION FOR VIDEO OPEN ENDS: The next questions ask your opinion of some of these themes/taglines. You can either type your responses or record them - whichever you prefer.

10. What does New Hampshire's theme/tagline "Live Free" mean to you?

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11. Now, thinking specifically in terms of leisure travel, what does New Hampshire's them/tagline "Live Free" mean to you?

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## DEMOS

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

D1. Are you currently ...?  
Married/living as married  
Divorced/Separated  
Widowed  
Single/Never married

D2. Including you, how many people live in your household? \_\_\_\_\_ [IF 1, SKIP TO D4]

D3. How many children under the age of 18 live in your household? \_\_\_\_\_

D4. Which of the following categories represents the last grade of school you completed?  
High school or less  
Some college/technical school  
College graduate  
Post-graduate degree

D7. Do you identify as...?

Male  
Female  
Other  
Prefer not to answer