Image Perception Research

Summary of Findings

November 2016

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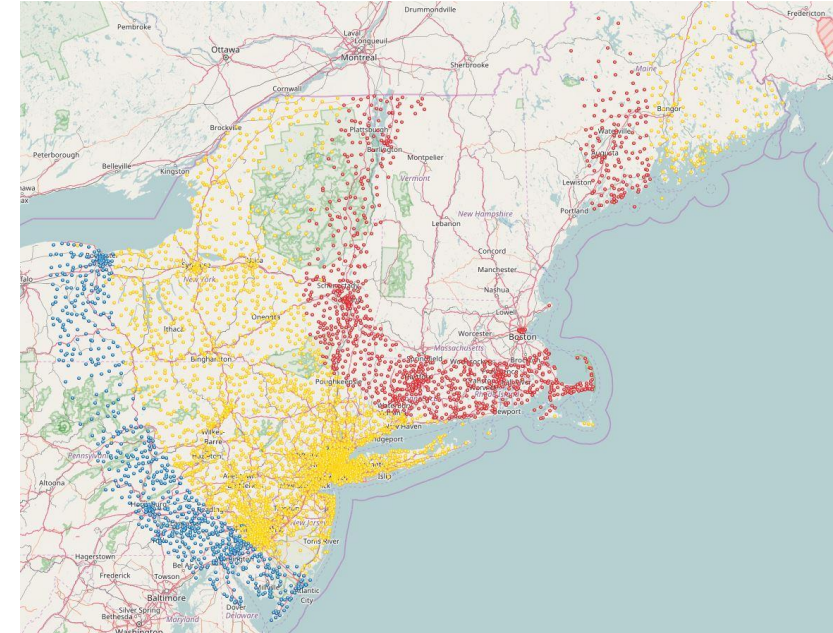
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Research Objectives

The effectiveness of marketing efforts are enhanced with excellent creative and media placement efforts. Ultimately, however, strategic positioning concerns represent the most critical foundation of any promotional plan. Understanding what makes the state most appealing to whom is the fundamental building block of the communication plan. To that end, this research is designed to address the following informational objectives.

- *Assess the overall image of New Hampshire from the perspective of current and potential visitors;*

- *Identify key attitudes/perceptions about New Hampshire as a destination, including perceptions of its key strengths and weaknesses;*

- *Define the prevailing market position, or positioning profile, of the area in the context of consumer perceptions vis-à-vis those of key competitors, which are driven by imagery and selection criteria;*

- *Investigate the competitive landscape and identify ways in which New Hampshire can differentiate and position itself as the preferred destination;*

- *Identify key motivators – both rational (product) and emotional – to visitation of the area and its key competitors and how the state can prompt additional consideration and visitation;*

- *Determine New Hampshire's key features and benefits offered to visitors, both overall and as it might vary by market; and*

- *Recommend a sustainable brand and image strategy with accompanying measures for success.*

Methodology

- In order to address these informational objectives, an image perception survey was conducted among travelers within a day's drive of the state. A total of 1,016 internet surveys were conducted in a radius surrounding the state. The map to the right indicates the ZIP codes in each of the radii.

- The survey explored levels of familiarity, appeal, and visitation with New Hampshire and its competitive set. It also explored a host of image considerations to uncover the underlying dimensions that drive appeal. A copy of the survey instrument employed in this study can be found in the appendix.

Target Geography	Completed Surveys
50 – 100 miles	307
100 – 250 miles	305
250 – 300 miles	404
Total	**1,016**

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Insights

- In terms of the competitive position of the surrounding New England states, New Hampshire has a comparatively low level of visitation, familiarity, and associated appeal and interest.

- This is due in part to a product/image that is essentially *outdoor* and therefore can only appeal to a singular segment of the traveling population.

- In terms of image, the state is considered a beautiful and outdoor-oriented experience.

- Unfortunately, this image leaves it undifferentiated from Vermont and Maine.

- Positioning in this competitive set should rely on personality and feel. Vermont is more sophisticated and winter oriented, and Maine has the coast.

- New Hampshire needs to be the approachable, affordable, convenient, beautiful New England experience.
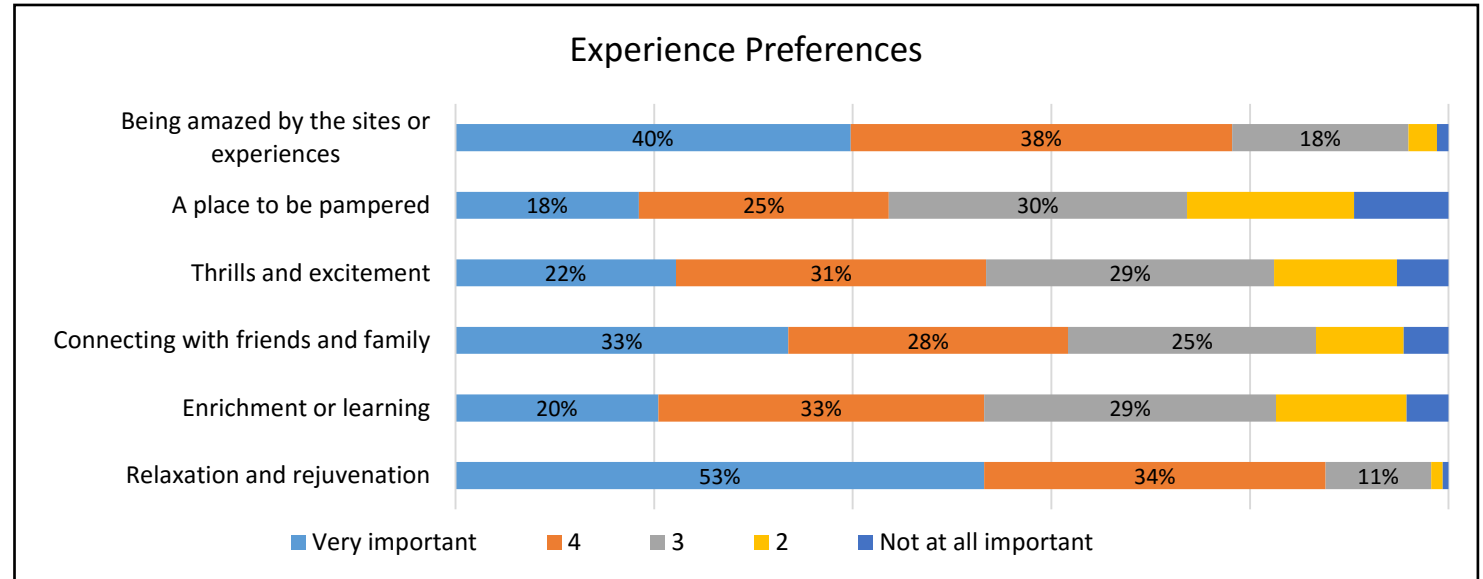
TRAVEL PREFERENCES AND BEHAVIORS

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Overview

- When considering image perceptions, it is important to note there is a wide variety of types of travelers looking for different types of experiences.

- As a result, before specific image perceptions and potential motivators and differentiators are considered, an examination of these background travel preferences provides a helpful context.

- Specifically, we'll consider the types of trip motivations at play and what matters to travelers, along with their experience and interest in New Hampshire and the competitive set.

Trip Motivations

- People look for different types of experiences when they travel. The six types of experiences in the chart illustrate how vastly different preferences can be.

- For most people, relaxation and being amazed are objectives.

- On the other hand, far fewer people are looking to be pampered or enriched.

- These motivations generate different appeals to different destinations

Experience Preferences

Category	Very important	4	3	2	Not at all important
Being amazed by the sites or experiences	40%	38%	18%		
A place to be pampered	18%	25%	30%		
Thrills and excitement	22%	31%	29%		
Connecting with friends and family	33%	28%	25%		
Enrichment or learning	20%	33%	29%		
Relaxation and rejuvenation	53%	34%	11%		

■ Very important   ■ 4   ■ 3   ■ 2   ■ Not at all important

Importance Ratings

- In order to explore what matters to travelers when selecting a destination, respondents were asked to rate a whole battery of attributes in terms of their importance (which are used subsequently to rate individual states). The mean importance ratings on a 5-point scale are shown in rank order in the accompanying table.

- Not surprisingly, those which are most important are in a sense necessary conditions all destinations should have – be affordable, beautiful, safe and exciting to visit. Alternatively, the lower rated attributes simply have narrow niche appeal, like extreme sports.

| Attribute	Rating
Is safe	4.52
Is affordable	4.37
Is a place I would be excited to visit for a leisure trip	4.31
Offers great vacations for people like me	4.29
Is beautiful	4.28
Is a fun and exciting place	4.12
Always has something new to discover	3.92
Is unique because of the variety of destinations and activities it offers vacationers	3.88
Is a good place to go to the beach	3.82
Is easy to get to	3.80
Is a great place to vacation when traveling without children	3.75
Has interesting historical sites and museums	3.69
Offers lots of outdoor recreation	3.66
Offers an attractive lifestyle	3.62
Has great parks	3.60
Is rich in culture and the arts	3.58
Is a good place for shopping	3.45
Is a good place for fairs and festivals	3.43
Is a good place for water activities	3.31
Is a good place to live and work	3.17
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.16
Is a kid-friendly vacation destination	3.00
Has a "been there, done that" attitude about this state	2.70
Is a great place for winter sports such as skiing and snowmobiling	2.34
Is a great place to participate in extreme sports	2.23
Is a great place to watch professional extreme sports	2.23

Importance Factors

- A somewhat more helpful way to consider this type of data is to conduct a *factor analysis,* which groups considerations that *move* together with one another. If one thinks museums are important, it's likely culture and learning are also important.

- What can be seen here are some of the different kinds of attributes – discovery and learning experiences, outdoor experiences, and more adult experiences along with general measures of appeal.

Attribute	Rating
Has interesting historical sites and museums	3.69
Is rich in culture and the arts	3.58
Always has something new to discover	3.92
Is a good place for fairs and festivals	3.43
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Is a good place for water activities	3.31
Offers lots of outdoor recreation	3.66
Is a good place to go to the beach	3.82
Has great parks	3.60
Is a great place to vacation when traveling without children	3.75
Has a "been there, done that" attitude about this state	2.70
Is a good place for shopping	3.45
Offers an attractive lifestyle	3.62
Is affordable	4.37
Is safe	4.52
Is easy to get to	3.80

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Travel Segments

- The reason we consider these motivations and importance ratings is that people take different kinds of trips and it's sometimes helpful to view relative appeal through the lens of the types of travelers being surveyed.

- In light of this, we used this same importance data to develop different travel segments or types of travelers. We identified five distinct groups. Most of these segments represent about a fifth of the population, except for "outdoor," which is nearly a third of those interviewed.

- This segmentation will be used to help understand the relative appeal of New Hampshire within the competitive set.

KIDS AND FUN 19%
CHILDLESS GETAWAY 19%
ADULT RECHARGE 16%
QUAINT AND CULTURED 17%
OUTDOOR 29%
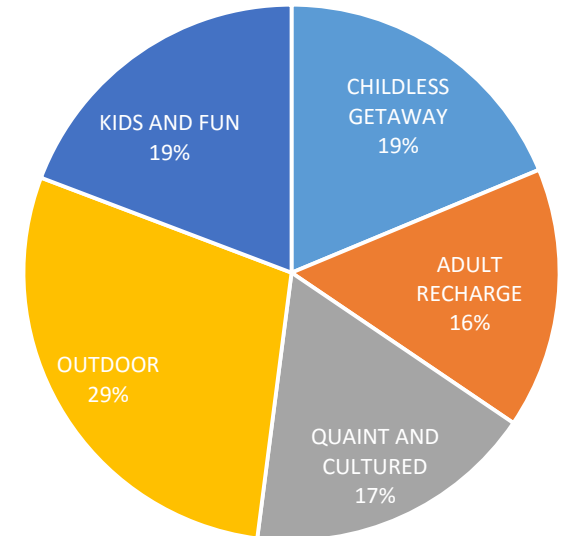
Travel Segments

1. Childless Getaway:
- These are the oldest travelers who are upscale with no kids and travel to museums, historic sites, for culture and arts.

Adult Recharge:
- These travelers are older empty-nesters who tend to be looking for a safe, relaxing and affordable experience.

Quaint and Cultured:
- These are younger single and single-parent households who are enrichment oriented.

Outdoor:
- This younger group is looking for experiences and engagement with a strong outdoor focus.

Kids and fun:
- This is the youngest group of travelers who are married with kids and looking for kid-friendly destinations to connect with family and have thrills and excitement.

| Segment Demographics	Childless Getaways	Adult Recharge	Quaint & Cultural	Outdoor	Kids & Fun
Marital Status					
Married	65%	58%	45%	58%	81%
Divorced/Separated	10%	10%	15%	13%	7%
Widowed	1%	3%	5%	0%	1%
Single/Never married	24%	29%	35%	29%	11%
Education					
High school or less	11%	16%	10%	16%	13%
Some college/technical school	29%	33%	26%	27%	24%
College graduate	40%	40%	45%	36%	38%
Post-graduate degree	20%	10%	18%	20%	25%
Income					
Less than $35,000	11%	16%	17%	16%	9%
$35,000 but less than $50,000	14%	15%	14%	14%	10%
$50,000 but less than $75,000	24%	29%	25%	21%	23%
$75,000 but less than $100,000	22%	16%	21%	21%	30%
$100,000 but less than $150,000	20%	17%	14%	19%	20%
$150,000 but less than $200,000	5%	5%	6%	5%	4%
$200,000 or more	3%	2%	3%	3%	4%
Ethnicity					
African-American/black	6%	10%	8%	4%	6%
Asian/Pacific Islander	4%	2%	3%	5%	4%
Caucasian/white	89%	83%	85%	84%	84%
Latino/Hispanic	1%	3%	5%	5%	6%
Mixed ethnicity	1%	2%	1%	1%	1%
American Indian	0%	0%	1%	0%	1%
Other	1%	0%	0%	0%	0%
People in Household	2.4	2.5	2.8	3.0	4.0
Kids Under 18	0%	32%	60%	35%	100%

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COMPETITIVE SET

From an image positioning perspective, it is essential to consider the results in a competitive context. Before image considerations are reviewed, however, it is helpful to understand the relative familiarity, experience, and attitudes toward each of the competitive states.
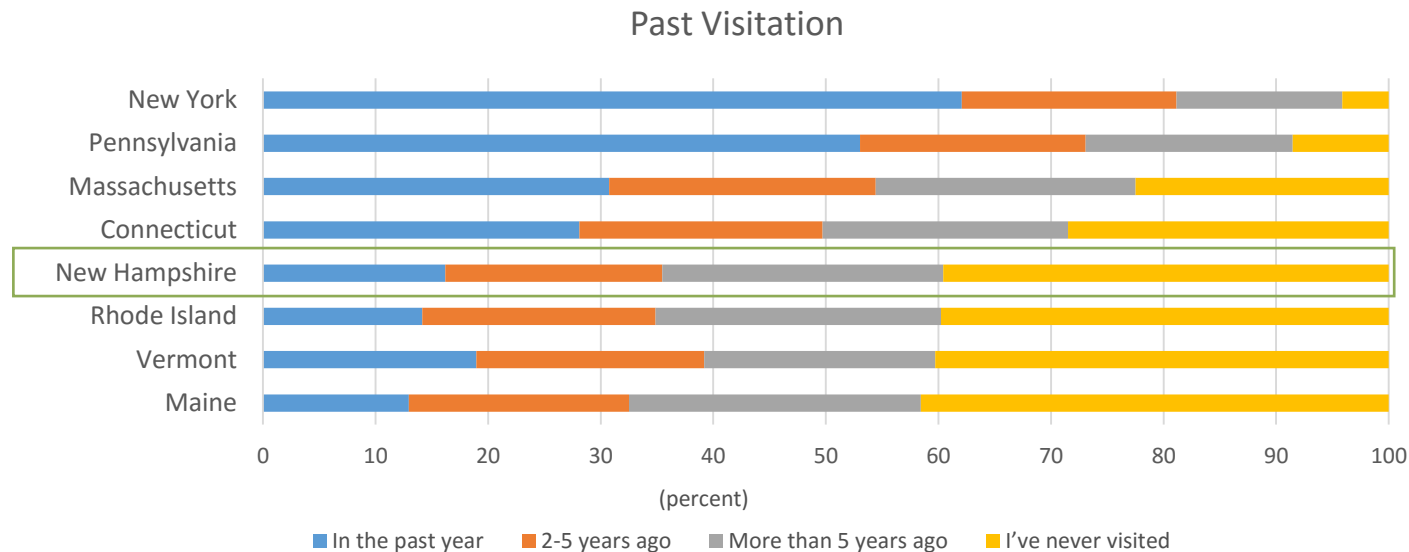
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Overall Familiarity

- Travelers' images and perceptions are driven to a large extent by their experience and familiarity.

- Among the target markets, New York has the leading share of familiarity followed by Pennsylvania.

- This is driven in part by population and proximity. The data is reflective of the households in each target state – and New York is the largest population.

- New Hampshire's familiarity is similar to that of Vermont, Maine, and Rhode Island. This is a theme that we will see recurring over several metrics.
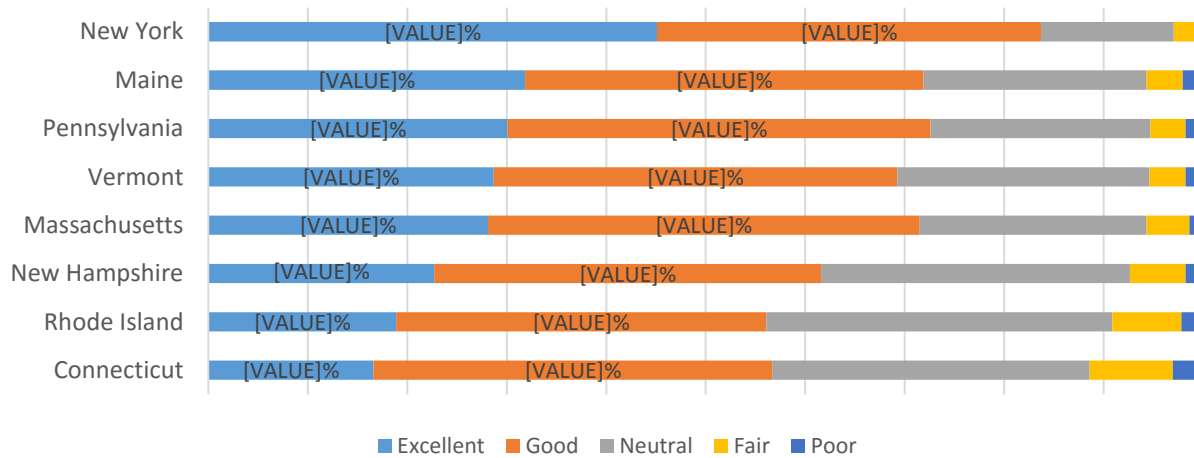

Overall Familiarity
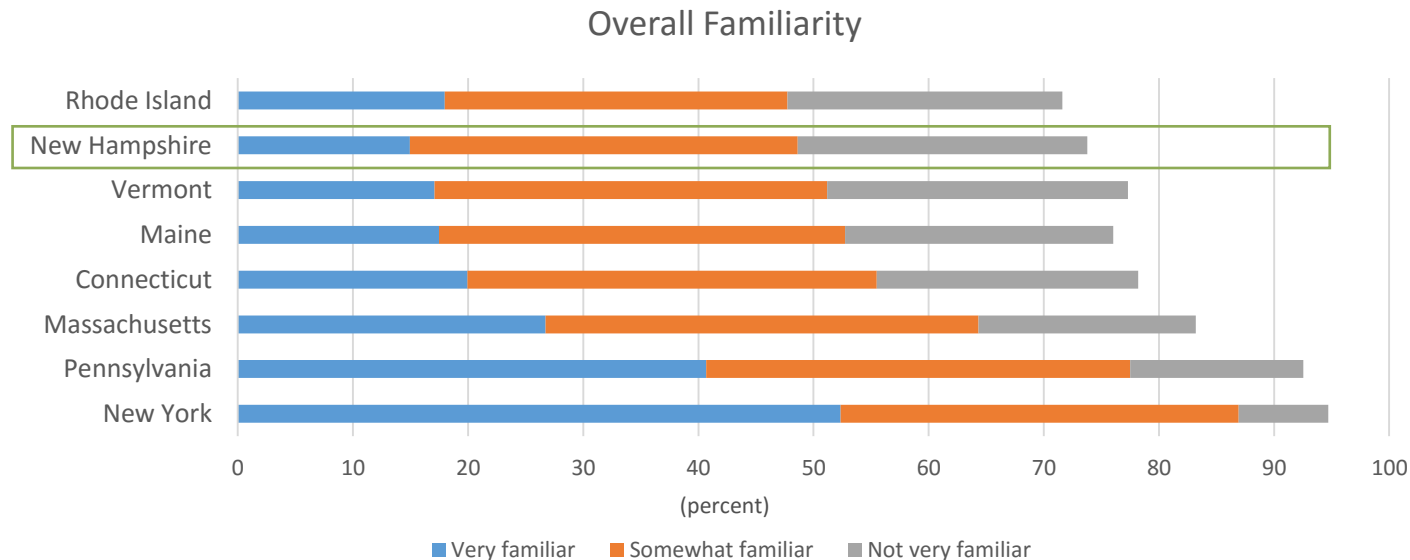
Past Visitation

- Familiarity and visitation are typically parallel measures, with the former being a function of the latter.

- In many ways, what appears to be the case here is the more developed states have higher visitation and familiarity. In part this is due to population.

- The more rural and northern New England states have sizably less visitation, with about 40% of those interviewed never having visited.
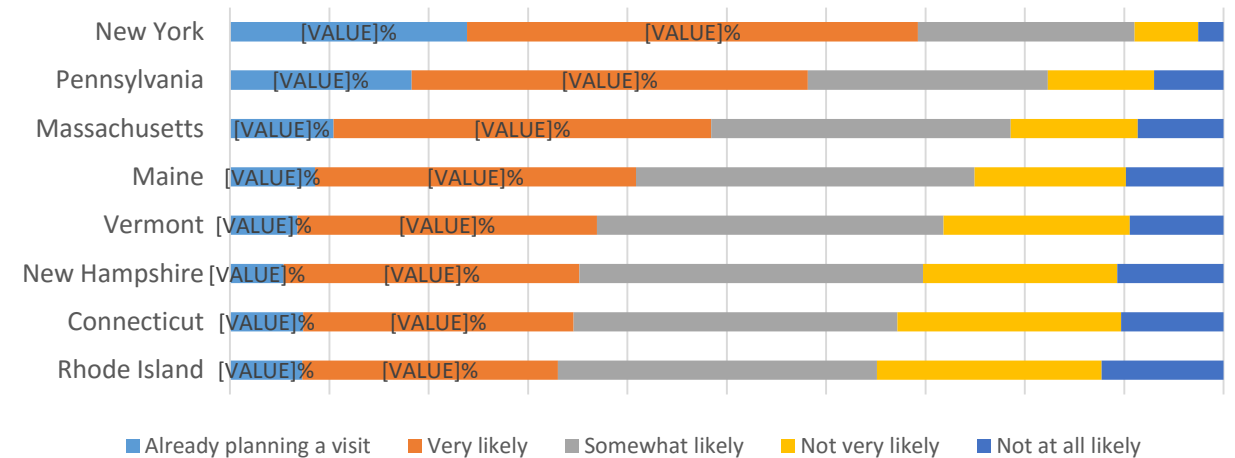
Past Visitation

Legend: In the past year | 2-5 years ago | More than 5 years ago | I've never visited

(percent)

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Overall Rating and Likelihood to Visit

Overall Rating

Likely Visitation

Excellent | Good | Neutral | Fair | Poor

Already planning a visit | Very likely | Somewhat likely | Not very likely | Not at all likely

- Interestingly, overall ratings and likelihood to visit don't exactly parallel the prior experience results. In particular, Maine is significantly better perceived and apparently more likely to be visited than might be expected. Conversely, Connecticut is apparently less well liked than experience might suggest. Vermont also outperforms New Hampshire.

- So the question is what image perceptions are driving these results and how can New Hampshire generate greater familiarity, differentiation, and appeal.

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IMAGE OVERVIEW

Understanding the image of New Hampshire and the other states in the competitive set requires understanding the ingredients of consumer perceptions – what are the strengths and weaknesses of these states and how do they differ.

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New Hampshire Ratings

- Each of the competitors was rated on the attributes that were considered from an importance perspective earlier.

- While the comparative image is critical to understand strengths and weakness, it is helpful to see specifically how travelers rate New Hampshire.

- The table to the right is a rank ordering of those ratings on a 5-point scale.

- Overall the state is seen as a beautiful outdoor recreation destination. This position could be limiting its overall appeal and failing to help differentiate.

Attribute – New Hampshire	Rating
Is beautiful	4.30
Is safe	4.18
Offers lots of outdoor recreation	4.16
Is a great place for winter sports such as skiing and snowmobiling	4.02
Is easy to get to	3.96
Is a great place to vacation when traveling without children	3.88
Has great parks	3.87
Is affordable	3.85
Offers great vacations for people like me	3.85
Is a place I would be excited to visit for a leisure trip	3.83
Is a kid-friendly vacation destination	3.83
Is unique because of the variety of destinations and activities it offers vacationers	3.79
Offers an attractive lifestyle	3.78
Always has something new to discover	3.77
Is a fun and exciting place	3.75
Has interesting historical sites and museums	3.73
Is a good place for fairs and festivals	3.72
Is a good place to live and work	3.70
Is a good place for shopping	3.58
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.57
Is rich in culture and the arts	3.54
Is a good place for water activities	3.52
Is a great place to participate in extreme sports	3.23
Is a great place to watch professional extreme sports	3.17
Is a good place to go to the beach	3.10
Has a "been there, done that" attitude about this state	3.04

Competitive Attribute Associations

	New Hampshire	Connecticut	New York	Maine	Massachusetts	Pennsylvania	Rhode Island	Vermont
Is beautiful	4.30	3.96	4.04	4.36	4.11	4.16	4.16	4.33
Is safe	4.18	3.95	3.21	4.15	3.86	3.85	3.99	4.28
Offers lots of outdoor recreation	4.16	3.83	3.83	4.20	3.93	4.00	3.71	4.16
Is a great place for winter sports such as skiing and snowmobiling	4.02	3.35	3.21	3.87	3.56	3.55	2.97	4.22
Is easy to get to	3.96	4.03	4.14	3.59	4.14	4.30	3.94	3.82
Is a great place to vacation when traveling without children	3.88	3.63	4.13	3.99	3.97	3.91	3.81	3.74
Has great parks	3.87	3.60	3.95	3.91	3.86	4.00	3.56	3.89
Is affordable	3.85	3.29	2.84	3.75	3.55	4.00	3.50	3.66
Offers great vacations for people like me	3.85	3.64	3.88	3.83	3.90	3.91	3.61	3.80
Is a place I would be excited to visit for a leisure trip	3.83	3.49	3.95	3.87	3.93	3.91	3.66	3.89
Is a kid-friendly vacation destination	3.83	3.65	3.39	3.93	4.03	4.07	3.66	3.76
Is unique because of the variety of destinations and activities it offers vacationers	3.79	3.57	4.18	3.78	4.08	3.95	3.62	3.73
Offers an attractive lifestyle	3.78	3.70	3.83	3.75	3.86	3.79	3.68	3.80
Always has something new to discover	3.77	3.57	4.34	3.79	3.97	3.94	3.54	3.70
Is a fun and exciting place	3.75	3.60	4.25	3.77	3.95	3.83	3.74	3.70
Has interesting historical sites and museums	3.73	3.83	4.24	3.74	4.39	4.35	3.97	3.78
Is a good place for fairs and festivals	3.72	3.56	3.73	3.69	3.86	4.10	3.70	3.75
Is a good place to live and work	3.70	3.57	3.33	3.61	3.79	3.85	3.64	3.64
Is a good place for shopping	3.58	3.56	4.39	3.54	4.01	3.85	3.64	3.50
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.57	3.59	3.52	3.65	3.80	3.74	3.42	3.76
Is rich in culture and the arts	3.54	3.73	4.41	3.57	4.19	3.92	3.81	3.64
Is a good place for water activities	3.52	3.40	3.05	3.86	3.59	3.25	3.66	3.37
Is a great place to participate in extreme sports	3.23	3.03	2.73	3.24	3.10	3.01	2.97	3.39
Is a great place to watch professional extreme sports	3.17	2.93	2.68	3.25	3.10	2.99	2.95	3.31
Is a good place to go to the beach	3.10	3.23	2.68	3.58	3.51	2.34	3.88	2.68
Has a "been there, done that" attitude about this state	3.04	3.28	3.18	3.01	3.24	3.23	3.16	3.16

These overall ratings are better understood in context. Here we see the ratings of all the states. Interestingly, those of Maine and Vermont are strikingly similar to New Hampshire's.

Open-Ended Description

When explored in an open-ended fashion, we found a similar result. The state's image is clearly outdoor – and more specifically focused on mountains.

Images – Strongest Associations

4.36

4.14

4.14

4.13

4.12

4.08

- In addition to the attribute evaluations, respondents were asked how well the state image fits with a selection of photographs. The strongest imagery association with the state had a strong outdoor appeal – hiking, biking, skiing, and quaint New England.

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Images – Strong Associations

3.98

- The second tier of imagery continued the strong outdoor associations.

3.97

- The unassociated images were all skewed to more urban and cultural images of dining, art and architecture.
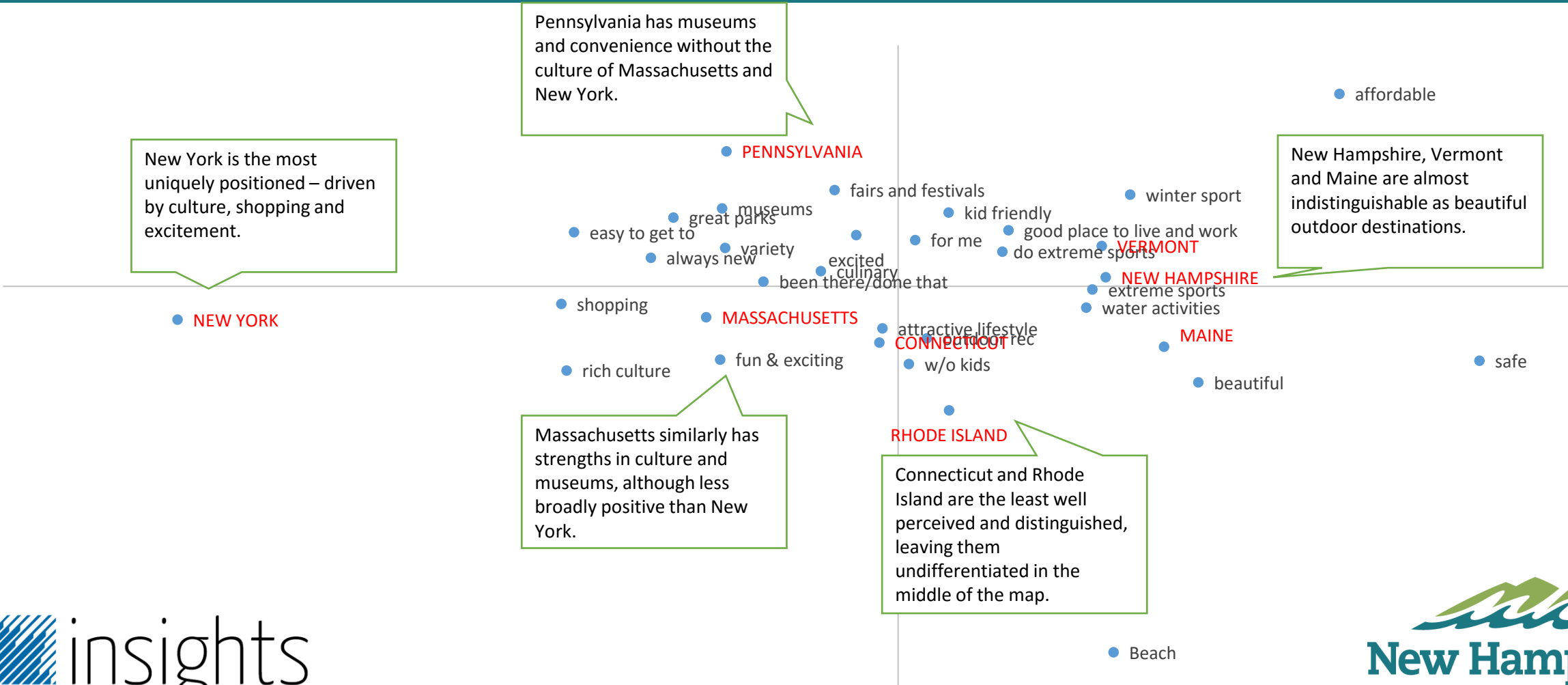
3.88

3.83

Competitive Imagery Associations

	New Hampshire	Connecticut	New York	Maine	Massachusetts	Pennsylvania	Rhode Island	Vermont
brewery	3.71	3.30	3.71	3.31	3.56	3.51	3.32	3.35
cannon	4.13	3.19	3.18	3.86	3.23	3.41	2.63	4.37
curriermuseum	3.20	3.29	3.35	2.94	3.33	3.30	3.28	3.04
surf	3.06	2.86	2.48	3.09	3.07	2.11	3.51	2.65
town	3.54	3.57	4.04	3.49	3.99	3.60	3.90	3.24
bikes	4.14	3.68	3.29	3.97	3.63	3.98	3.58	4.09
atv	3.88	3.19	3.03	3.71	3.38	3.74	3.15	3.70
kayak	3.98	3.28	3.08	3.81	3.29	3.57	3.17	3.65
monadnock	4.36	3.72	3.46	4.09	3.69	3.96	3.32	4.29
fronoconiainn	4.12	3.94	3.27	3.91	3.92	3.85	3.74	3.93
hermit woods	3.83	3.58	3.20	3.58	3.48	3.66	3.42	3.79
manchester	3.23	3.62	3.99	2.99	3.81	3.61	3.46	3.01
mt washington hotel	3.97	3.18	2.65	3.41	3.10	2.95	2.87	3.63
mt washington hiking	4.08	3.34	3.10	3.90	3.45	3.58	3.17	3.93
strawberybanke	4.14	3.97	3.14	3.88	4.08	4.00	3.72	3.94
welington room seafood rick dumont	3.67	3.84	3.90	3.60	3.97	3.32	3.87	3.42

Viewed in context, while New Hampshire is clearly positioned as outdoor, quaint, new England, it's amazingly close to Maine and Vermont.

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Competitive Review

- This initial review of the competitive landscape suggests that New Hampshire is competing as an undifferentiated competitor for a limited outdoor travel market.

- In terms of familiarity and visitation, the state is ranked rather low. At the same time, in terms of overall appeal, Maine and Vermont have stronger draws.

- From an image perspective, New Hampshire is beautiful outdoor recreation and mountains. However, this is fairly similar to a host of key competitors.

- The critical issue to explore is how New Hampshire can promote itself to gain leverage in this competitive marketplace by playing on the state's strengths and identifiable competitive weaknesses. To do this we have employed perceptual mapping. This relies on a multivariate approach called discriminant analysis. The result plots all the attributes and competitors in the same space where proximity equates to similarity.

Perceptual Mapping

Pennsylvania has museums and convenience without the culture of Massachusetts and New York.

New York is the most uniquely positioned – driven by culture, shopping and excitement.

New Hampshire, Vermont and Maine are almost indistinguishable as beautiful outdoor destinations.

Massachusetts similarly has strengths in culture and museums, although less broadly positive than New York.

Connecticut and Rhode Island are the least well perceived and distinguished, leaving them undifferentiated in the middle of the map.

affordable

PENNSYLVANIA

fairs and festivals

winter sport

museums

kid friendly

great parks

good place to live and work

easy to get to

for me

VERMONT

variety

do extreme sports

always new

excited

NEW HAMPSHIRE

culinary

extreme sports

been there/done that

water activities

shopping

NEW YORK

MASSACHUSETTS

attractive lifestyle

MAINE

CONNECTICUT

rec

rich culture

fun & exciting

w/o kids

beautiful

safe

RHODE ISLAND

Beach

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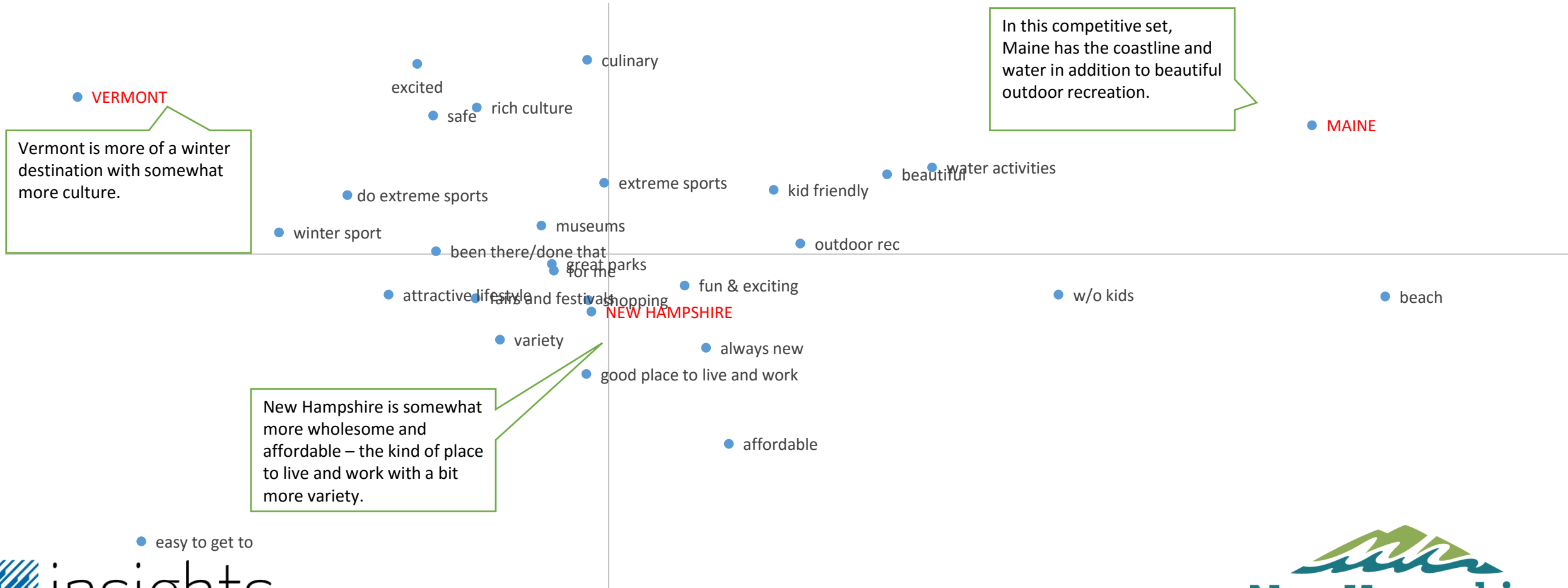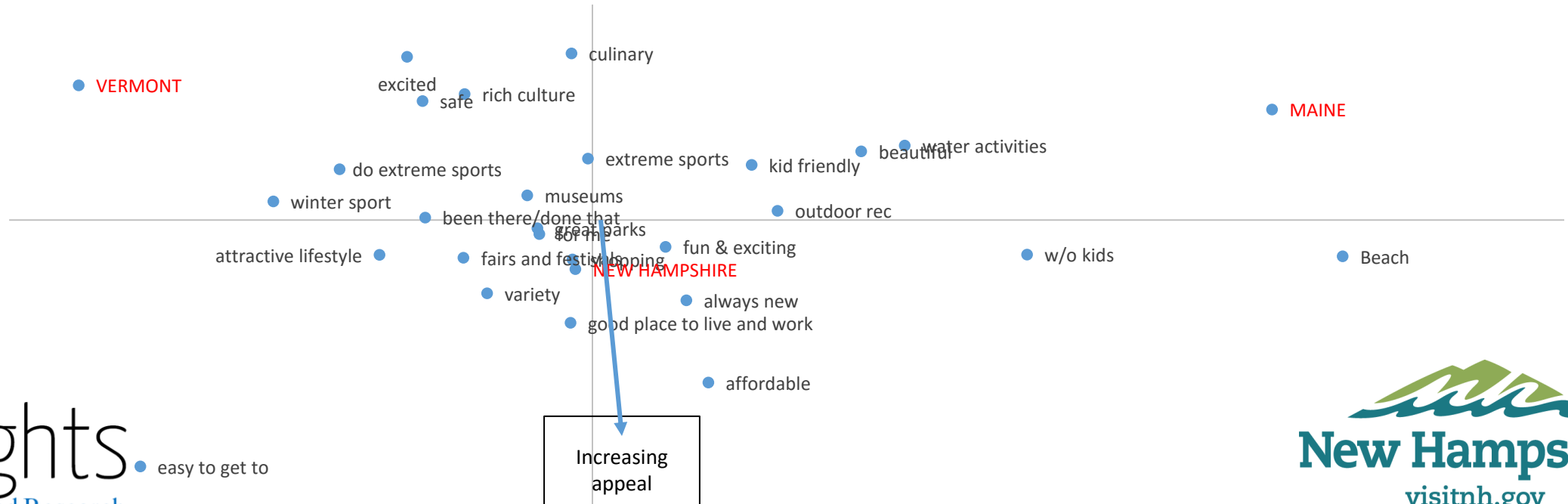New Hampshire
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Perceptual Mapping

- With this competitive set, it is clear that New Hampshire is strongly perceived as a beautiful outdoor destination.

- While this helps to distinguish it from the likes of New York and Massachusetts, the key issue from a competitive standpoint may be how to distinguish the state from its most similar rivals.

- In order to do this, the perceptual mapping exercise was repeated with just the core set of competitors to see how they could be differentiated.

Perceptual Mapping – Narrow Competitive Set

In this competitive set, Maine has the coastline and water in addition to beautiful outdoor recreation.

Vermont is more of a winter destination with somewhat more culture.

New Hampshire is somewhat more wholesome and affordable – the kind of place to live and work with a bit more variety.

VERMONT

MAINE

NEW HAMPSHIRE

culinary

excited

rich culture

safe

water activities

beautiful

extreme sports

kid friendly

do extreme sports

museums

winter sport

outdoor rec

been there/done that

great parks

for the

fun & exciting

attractive lifestyle

fairs and festivals shopping

w/o kids

beach

variety

always new

good place to live and work

affordable

easy to get to

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Perceptual Mapping – Opportunities

- Differentiation from the competitive set can make a destination more appealing. To help explore this, we considered where New Hampshire is located in light of respondents' evaluation of it as a leisure destination.
- Interestingly, the more positively the state is viewed the more differentiated the image is moving downward on the map. Specifically, a strong position is one that plays upon the affordability, appeal, variety, and convenience of the location.

Perceptual Mapping – Images

Nearly identical results are found with respect to the image perception exercise with Maine, New Hampshire and Vermont being similarly perceived. And again, beautiful mountains and idyllic New England is the image. The similarity in image among the three destinations is reflected in their proximity on this map. The question that remains is which images are more important.
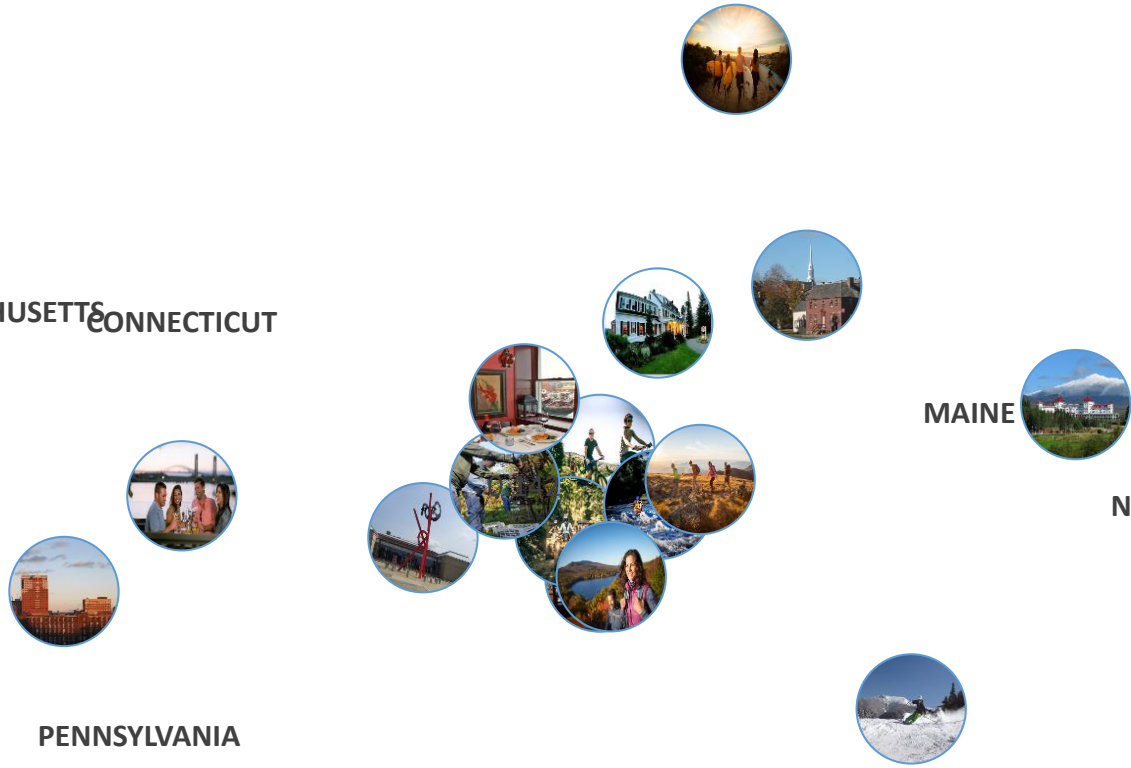
RHODE ISLAND
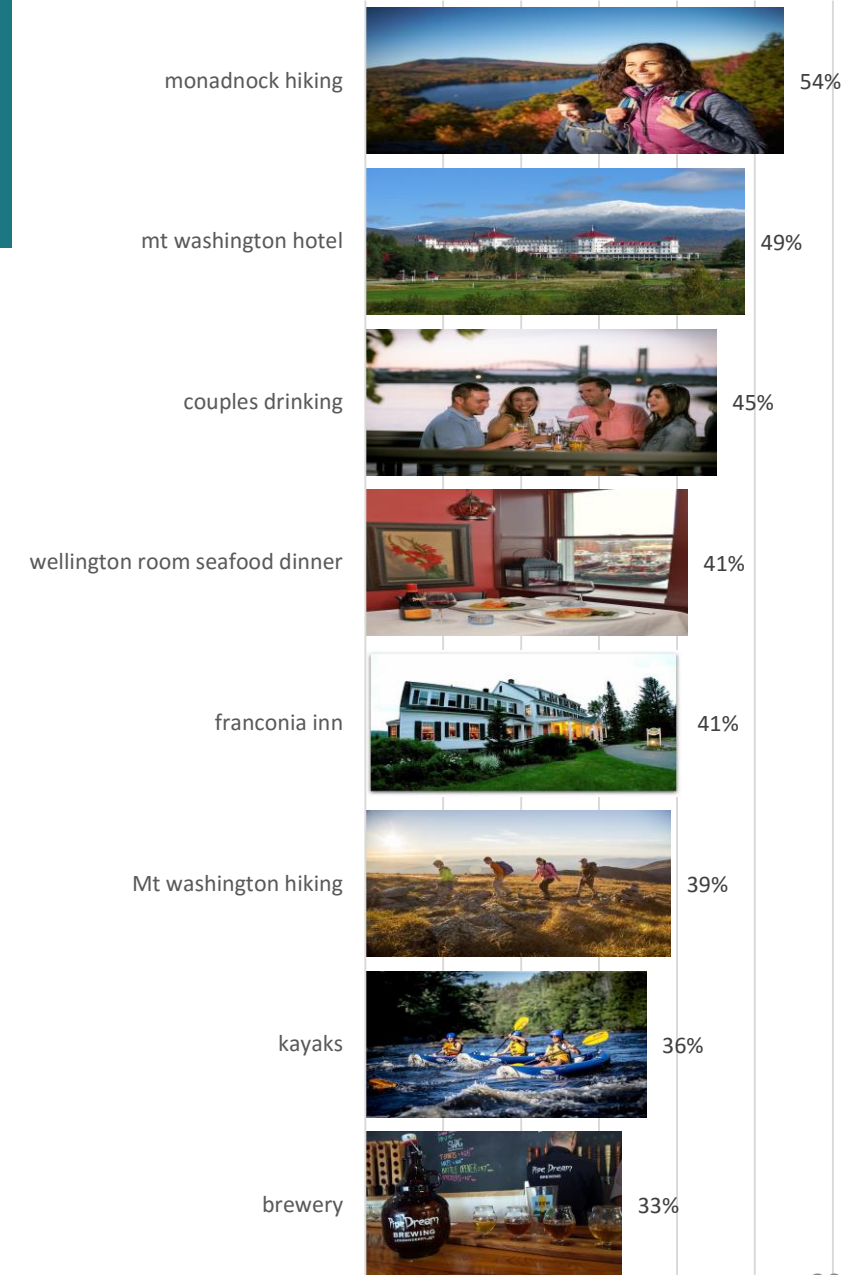
MASSACHUSETTS CONNECTICUT

MAINE

NEW HAMPSHIRE

VERMONT

NEW YORK

PENNSYLVANIA
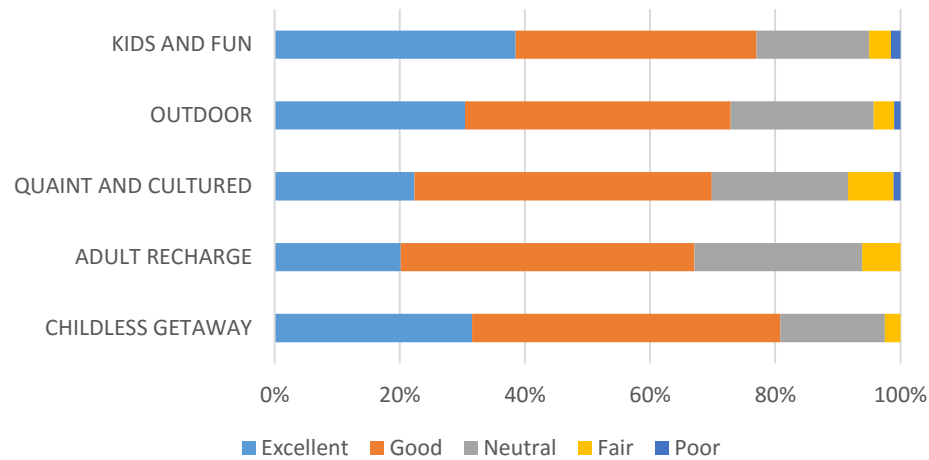
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Image Appeal

- To address the appeal of the imagery, respondents were asked which photographs would make them more interested in visiting New Hampshire. The results are illustrated in the table at the right with the appeal and motivation being in strengthening the core appeal we have seen – beautiful, outdoors, mountains, and New England charm. The challenge will be in making these characteristics ones that the state can make its own.

monadnock hiking 54%

mt washington hotel 49%

couples drinking 45%

wellington room seafood dinner 41%

franconia inn 41%

Mt washington hiking 39%
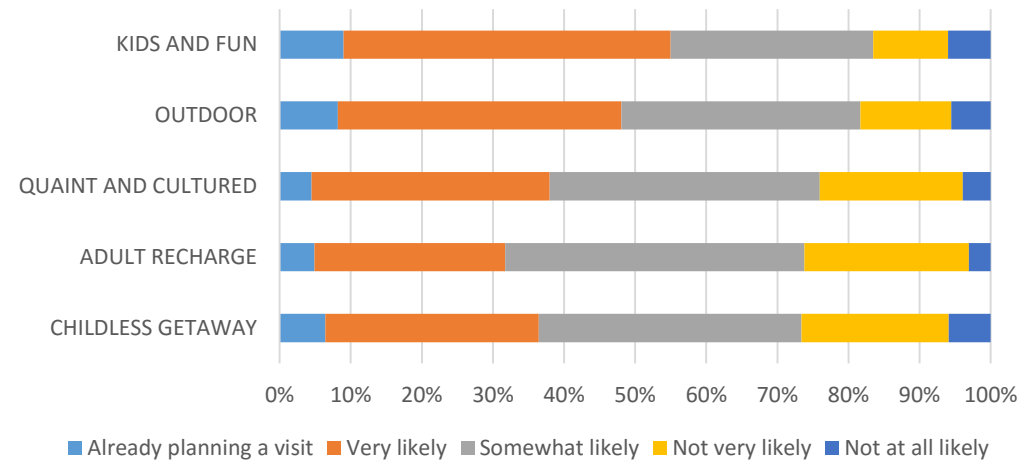
kayaks 36%

brewery 33%

Segments and Appeal

Overall Rating

Likelihood

- Finally, understanding to whom to appeal is as important as how to position the state. Interestingly, while Outdoor was the biggest segment, Kids and Fun is the segment that both rates the state high and is the most likely to come. This fits well with the affordable wholesome outdoor image and seems a good direction.

- Interestingly, Childless Getaways like the state but aren't very likely to come. It is here that some varied appeal may be in order, and their planning window may well be shorter. But importantly, outdoor is not the strongest target – here the competition of Maine and Vermont with more clearly defined imagery serves to weaken appeal.

Questionnaire

APPENDIX

New Hampshire Tourism
2016 Image & Brand Perception Study
September 20, 2016 Draft
Goal field date: week of October 3

ZIP. What is your ZIP code? _____

These are the screeners to identify leisure travel decision makers.

S1. Please indicate which of the following describe you. Select all that apply.

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 (IF =0, TERMINATE AFTER SCREENING QUESTIONS)	☐	☐
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	☐	☐
I use video streaming services like Hulu or Netflix	☐	☐

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?
1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age?   [TERMINATE under 18 - over 65]

Q1-Q3 will be used to classify respondents based on travel preferences. This will allow us to explore New Hampshire's image among different "segments" of travelers. DRED should provide input on attributes in Q2.

1. People look for different experiences when they travel. When you are picking a destination for a leisure trip, how important are each of the following?

[ROTATE]	Not at all important 1	2	3	4	Very important 5
Relaxation and rejuvenation					
Enrichment or learning					
Connecting with friends and family					
Thrills and excitement					
A place to be pampered					
Being amazed by the sites or experiences					

2. Please indicate how important each of the following are when selecting a destination for a leisure trip.

[ROTATE]	Not at all important 1	2	3	4	Very important 5
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling without children					
Has a "been there, done that" attitude about this state					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a great place to participate in extreme sports					
Is a great place to watch professional extreme sports					
Is a good place to go to the beach					
Is a good place for water activities					

3. When you are taking a leisure trip or getaway, which of the following types of lodging are you most likely to choose? *Select only one answer.*

Luxury resort hotel	
High-end full-service hotel	
Mid-level hotel	
Budget hotel or motel	
Bed and breakfast/Inn	
Airbnb	
Camping/RVing	
Guest ranch	
Other vacation home rental	

Q4-7 will give us an overview of the competitive situation. SMARInsights used a national travel database to determine competitors. The process will enable New Hampshire to define what makes the state unique when many of the New England states have similar product.

4. How familiar are you with the following states in terms of what they have to offer as a destination for a leisure trip?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Pennsylvania				
Rhode Island				
Vermont				

5. Which of these destinations have you visited?

[ROTATE]	In the past year	2-5 years ago	More than 5 years ago	I've never visited
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Pennsylvania				
Rhode Island				
Vermont				

6. Please rate the following destinations as a place to visit for a leisure trip. In some cases, you may not be very familiar with the destination, but please rate it based upon whatever you know or have heard.

[ROTATE]	Poor	Fair	Neutral	Good	Excellent
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Pennsylvania					
Rhode Island					
Vermont					

insights
Strategic Marketing and Research

New Hampshire
visitnh.gov

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7. How likely are you to visit each of these destinations for a future leisure trip?

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

Q8 & 9 will identify New Hampshire's and competitor states' leisure travel image. The results will be used to produce a perceptual map which illustrates the competitive landscape and identifies opportunities for differentiation and motivation. Attributes are the same as Q2 to get an understanding of New Hampshire's performance versus visitor importance.

FOR Q8 -10 HAVE THEM RATE NEW HAMPSHIRE AND ONE OTHER RANDOMLY CHOSEN DESTINATION WITH FAMILIARITY EQUAL/SIMILAR TO NEW HAMPSHIRE IN Q4. IF NOT FAMILIAR WITH NEW HAMPSHIRE, RATE FOR 2 OTHER STATES THEY ARE FAMILIAR WITH.

Now we are going to ask you more detailed information about [STATE] AND [STATE].

Q8. First of all, when you think of [INSERT STATE], what two words come to mind?

_____

_____

Q9. Please indicate how much you agree with each of these descriptions of [INSERT STATE]. In some cases, you may not have a lot of knowledge about a specific element, but please base your rating on what you have seen, heard or read about this state.

How much do you agree that [STATE]...?

[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					

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[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Has a "been there, done that" attitude about this state					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a great place to participate in extreme sports					
Is a great place to watch professional extreme sports					
Is a good place to go to the beach					
Is a good place for water activities					

Q10 & 11 will use a variety of New Hampshire images to enrich the competitive image assessment and to identify which images have the most potential for generating interest in visiting the state. Images selected are placeholders. DRED will need to provide final images. Those used in paid marketing should be included.

Q10. Now please indicate how much you agree that each of the following pictures fits with [STATE].

SHOW IMAGES DOWN LEFT SIDE. ROTATE	Strongly disagree - 1	2	3	4	Strongly agree - 5

brewery.jpg | Cannon3-6-12_047.jpg | CurrierMuseum.jpg | dwp_gyk_nh_surf_-347.jpg

dwp_gyk_nh_town-3161.jpg | dwp_gyk_nhdred_091515_286.jpg | dwp_gyk_nhdred_atv-7222.jpg | dwp_gyk_nhdred_kayak-210.jpg

5

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dwp_nh_monadnock_101515_783.jpg | franoconiainn.png | hermit_woods_harvest-003.JPG | manchester.jpg

Mt washington hotel-2.jpg | Mt-Washington-Hiking.jpg | Strawberybanke.jpg | Wellington Room Seafood Rick Dumont Images.jpg

Q11. These images are all from New Hampshire. Please indicate which would make you more interested in visiting New Hampshire.

SHOW IMAGES DOWN LEFT SIDE. ROTATE	Makes me more interested in visiting New Hampshire - 1

6

33

The following questions are for classification purposes only and will help us understand different groups of people.

DEMOS [ALL ON ONE SCREEN & DO NOT FORCE]
The following questions are for classification purposed only so that your responses may be grouped with others, to help us better analyze the advertising.

D1. Are you …?
Male
Female

D2. 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
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify _____)

D3. Are you currently …?
Married
Divorced
Widowed
Single/Never married

D4. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]

D5. How many children under the age of 18 live in your household? _____

D6. 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. Which of the following categories best represents your total annual household income before taxes?

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

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