

# **New Hampshire Division of Travel and Tourism Development**

2011-2012 Consumer Research  
New Brand Identity

v.5.7.12

# Today

- About Sentient Decision Science, Inc.
- Consumer Research
  - Consumer Focus Groups - key findings
  - Quantitative Testing - key findings

## About Sentient Decision Science

- Consumer consultancy and provider of behavioral science research methods
- An integrated team of psychologists, market researchers, statisticians, brand strategists, anthropologists and behavioral scientists.
- 2011 EXPLOR award winner for technological innovation in market research.
- Headquartered in Portsmouth, NH with satellite locations in Phoenix, Atlanta and St. Louis.



## Sample Client List

**Nestlé**



**PEPSICO**

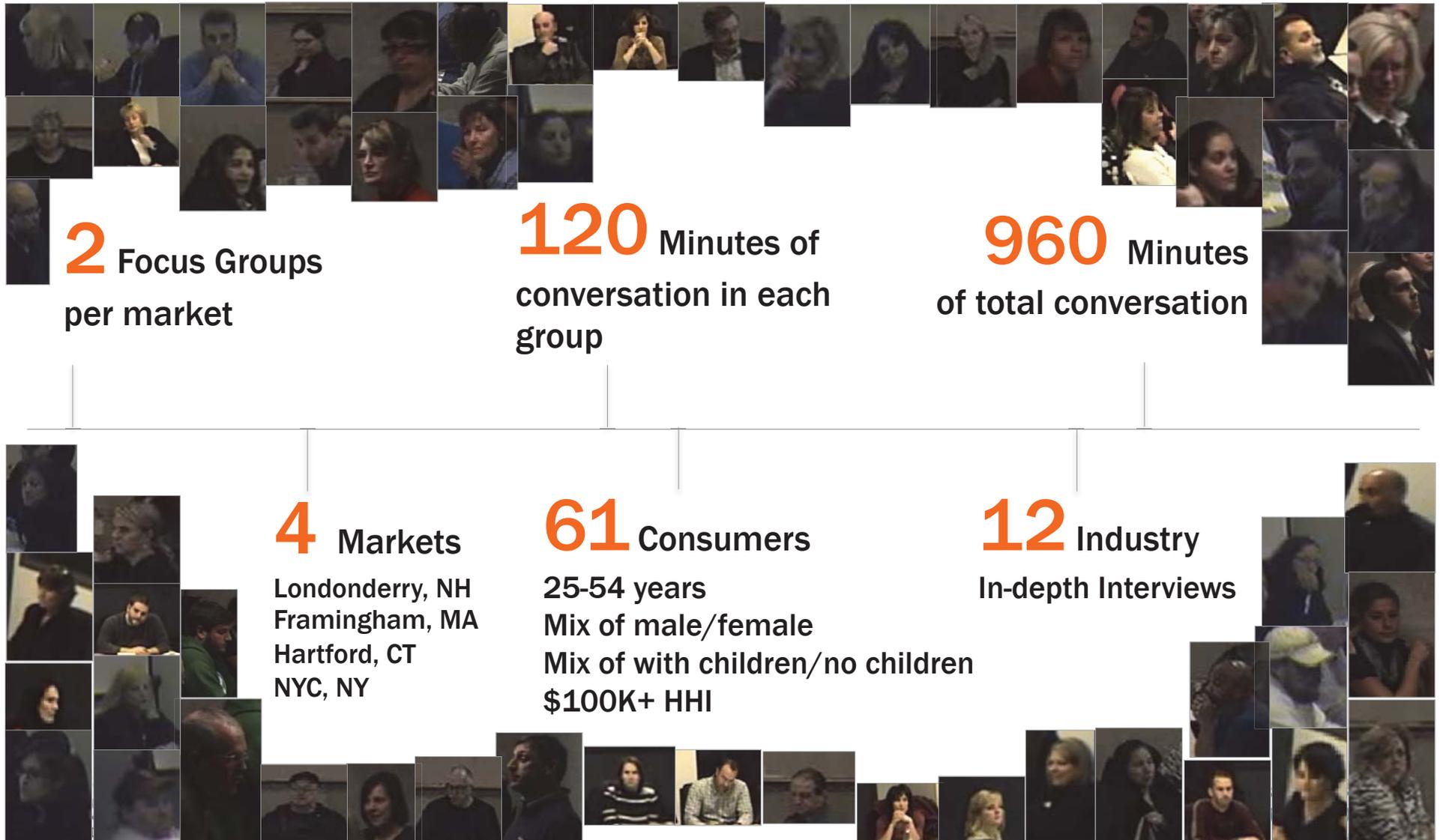


**iRobot**



# Consumer Focus Groups

# Consumer Focus Groups Methodology



# Consumer Research Stimuli

## Positioning Statements

### “Abundance”

Platform Theme: So much to choose from

From coastal routes past historic resorts to mountain passes through the highest peaks in the Northeast, New Hampshire is a traveler's dream. Along its roads and scenic byways are more historic sites than you can count, natural wonders that range from coasts to cliffs. View spectacular fall foliage, find tremendous tax-free shopping, and explore every kind of recreation under the sun. New Hampshire offers an unmatched bounty of experiences and adventures for you to discover.

Not at all Effective	1	2	3	4	5	Extremely Effective

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### “Live Free”

Platform Theme: Live Free and... [Surf, Explore, Climb...]

Visiting diverse regions forged by an unmatched independent spirit, offering vacation enthusiasts, adventures that truly inspire, engage and recharge their own independent spirit.

Not at all Effective	1	2	3	4	5	Extremely Effective

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### “Centerpiece”

Platform Theme: The center of it all

New Hampshire's unique blend of seasonality, geographic location and countless natural assets, offers guests an unmatched range of authentic New England experiences.

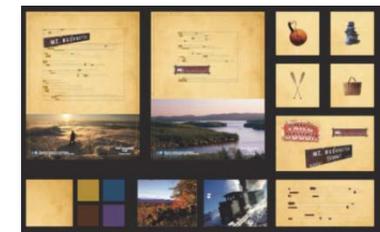
Not at all Effective	1	2	3	4	5	Extremely Effective

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## Mood Boards

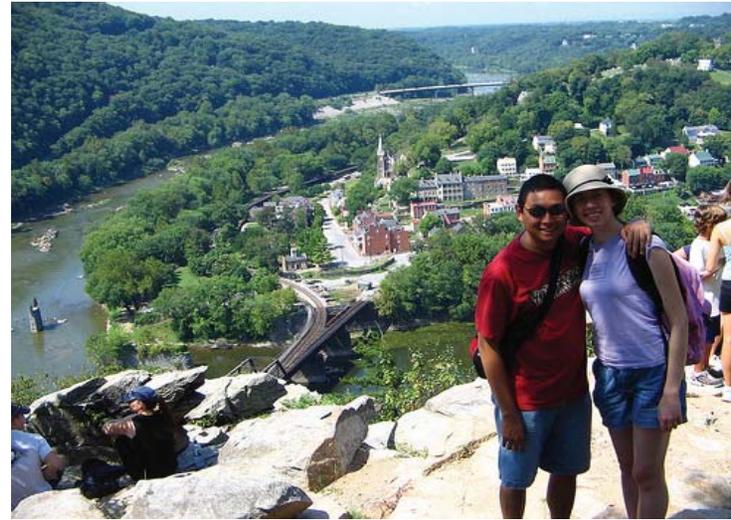


## Creative Concepts



# Focus Groups: Key Consumer Findings

# Vacations vs. getaways: Functional differences



Vacation	Getaway
Longer stay – 1 week	Shorter stays – 2-3 days
Lots of pre-planning	No real planning - Impromptu and impulsive
Far locations - Usually involves a jet	Close to home – up to 5 hours drive time
Usually more of a financial burden	Often less expensive
Usually occurs once a year	Several throughout the year
More structured and planned during each day	Less structure and usually no “itinerary”
Lots of activities	Can be very secluded with very little to do

# Vacations vs. getaways: The emotional differences

National Lampoon Family Vacation



Couples Retreat



Vacation	Getaway
“Must do”	“Want to do”
“It’s about my kids/family”	“It’s about me”
“Self-sacrifice”	“Get my arms back”

**Pick three words that you most associate with New Hampshire and pick three words that you least associate with New Hampshire**

Adventure    Endless options    Unmatched scenery    Historic    A must-visit  
Americana    Discovery    Luxurious  
Rugged    Wholesome    Thrilling activities    Inviting  
Relaxed    Greatest outdoor    Modern    Diverse    Intelligent  
Natural    Rustic    Best New England vacation  
Independent    Guaranteed enjoyment  
Cultured    Authentic    Fun  
Unique landscape    Edgy    Inspiring    A Treat    Vintage  
Friendly locals    Simple

## Celebrity Personification



- What celebrity, alive or deceased, do you think best represents how leisure travelers perceive New Hampshire?
- What celebrity would *never* personify New Hampshire?

New Hampshire conjures up images of the outdoors and the scenery- not edgy, modern, or luxurious

A must-visit A treat **Unique Landscape** Adventure Americana Authentic

Rugged Cultured **Relaxed** Discovery Friendly Locals Fun

**Greatest Outdoor** Inspiring Historic

Independent Intelligent Inviting **Natural** Rustic Thrilling

Simple Activities **Unmatched-scenery**

Vintage Wholesome *Modern* Endless-Options *Edgy*

Best-New England Vacation Diverse Guaranteed-enjoyment

*Luxurious*

# New Hampshire would be a down-to-earth and approachable celebrity



# Mood Board Findings

- ✓ People or no people?
- ✓ Surprisingly New Hampshire



# Creative Concepts Findings – “Live Free” Most Appealing



# The “Live Free” concept was met with enthusiasm

*“Simple messages, great examples, live free and explore, live free and surf. Simple and direct, it gives you the message.” – Daphne, 5:30 pm Framingham*



*“I like the attachment to the state’s slogan.” – Al, 8:00 pm Hartford*



*“Love the words Live free and...it’s very catchy.” – Dan, 5:30 pm Framingham*



*“Live free and explore, live free and blossom...it gives you so many things... hope!” – Carrie, 5:30 pm Hartford*



*“Live free and explore, live free and discover, live free and blossom. It’s a great idea, a great thing.” – Peter, 8:00 pm Framingham*



*“Live free and surf, live free and explore, live free and discover it’s nice, easy and straight to the point.” – Bob, 8:00 pm New York*



## Logo Findings



- ✓ Most potential, although it will need additional work.



- ✓ Perceived as old-fashioned, and tended to have a one-dimensional focus on fall foliage



- ✓ More likely to cause confusion among the unfamiliar, while to the initiated it is "been there, done that."

## Summary of Key Findings

- ✓ Leisure travel to **fulfill fundamental emotional needs**
- ✓ Distinct views and emotions about **vacations vs. getaways**
- ✓ Current perceptions of NH cluster around the **outdoors** and **scenery**
- ✓ New Hampshire's "attitude and persona" is more **down-to-earth** and **approachable** – not edgy or flashy
- ✓ Most consumers had strong, favorable reactions to the "**Live Free and...**" concept

# Creative Refinement for Testing

## Phase 1: Qualitative Testing



## Phase 2: Quantitative Testing



## Final In-Market



# Quantitative Testing

## Objectives

- ✓ Which creative concepts = greatest preference for New Hampshire
- ✓ Identify emotional associations with New Hampshire
- ✓ Uncover any preferences for imagery by audience segments
- ✓ Inform final creative platform and logo development

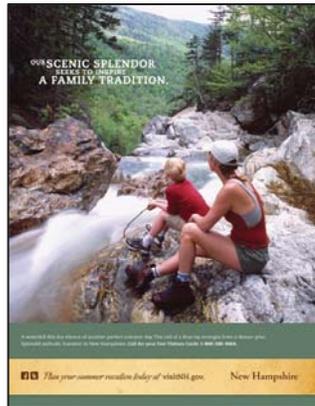
# Research Stimuli: Ad Concepts

## “Live Free” Imagery

## “Abundance” Imagery

“Abundance”  
Text

Concept 1



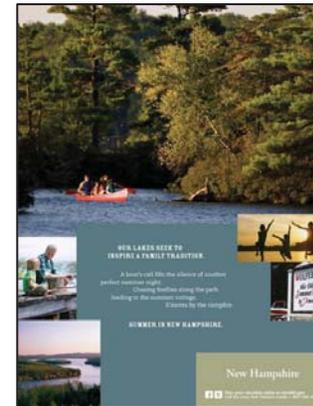
W/ kids

Concept 3



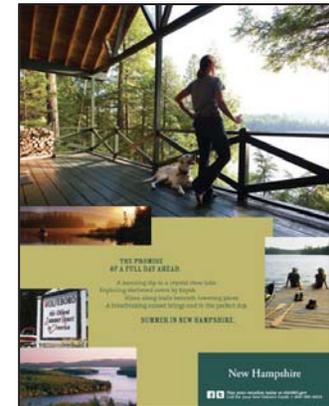
W/o kids

Concept 5



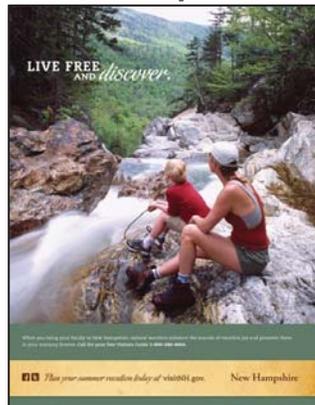
W/ kids

Concept 7



W/o kids

Concept 2



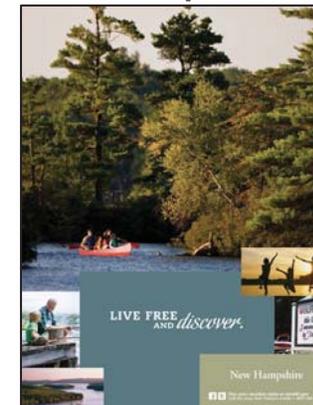
W/ kids

Concept 4



W/o kids

Concept 6



W/ kids

Concept 8



W/o kids

# Research Stimuli: Logos

Logo 1



Logo 2

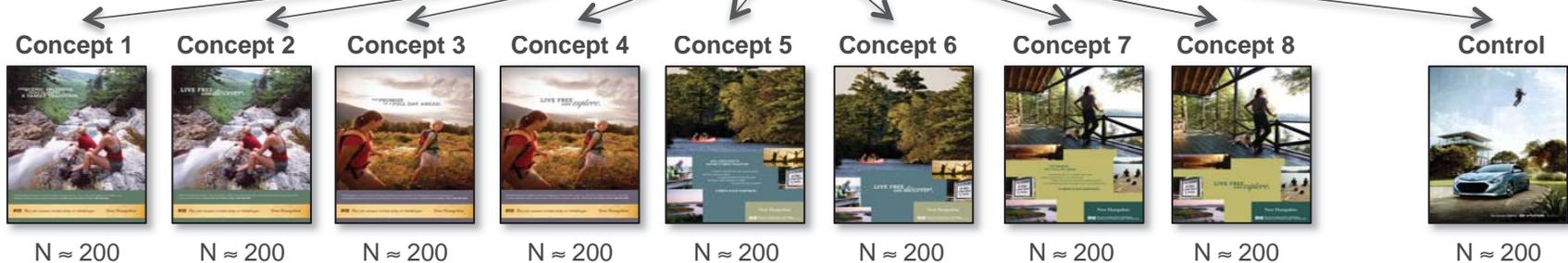


# Experimental Study Design

## All Respondents, N = 1,800

### Leisure Travel Profile Questions

Random Assignment



Automatic Brand Associations (ABA)

Stated Interest in Visiting NH

Choice Based Conjoint (CBC)

Derived Associations (Max Diff)

Explicit Concept Ratings

Logo Preference Vote

# Respondent Characteristics

- 20- minute online study
- Total N = 1831, margin of error = +/- 2.29%

- Regional Distribution:

<b>NH (9%)</b>	<b>MA (24%)</b>	<b>CT / RI (18%)</b>	<b>NY / Phil (49%)</b>
<b>N = 172</b>	<b>N = 439</b>	<b>N = 320</b>	<b>N = 900</b>

- Gender Distribution:

<b>Men (40%)</b>	<b>Women (60%)</b>
<b>N = 736</b>	<b>N = 1095</b>

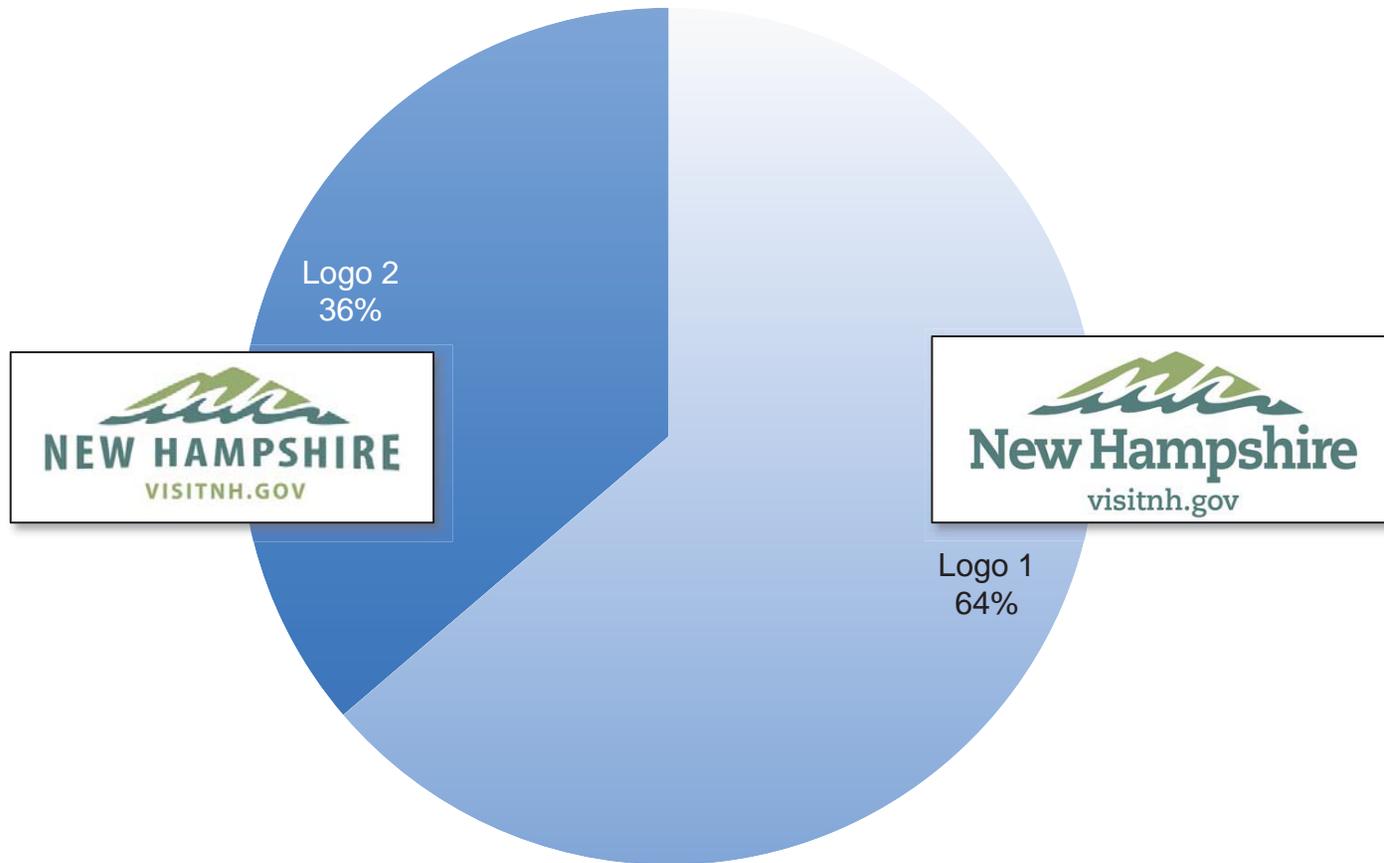
- Household Composition:

<b>With Kids (48%)</b>	<b>Without kids (52%)</b>
<b>N = 947</b>	<b>N = 884</b>

- Visitor Status

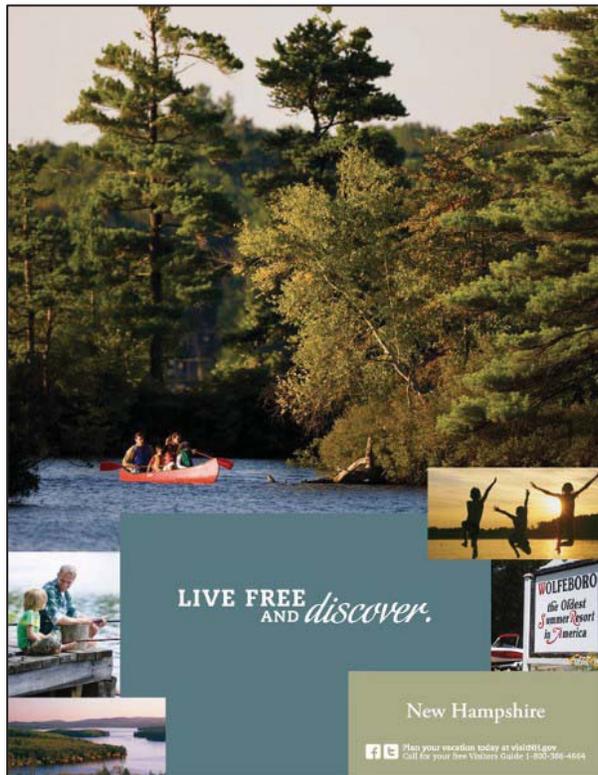
<b>Have visited NH (44%)</b>	<b>Non-visitors (56%)</b>
<b>N = 809</b>	<b>N = 1,022</b>

# Clear preference for Logo 1



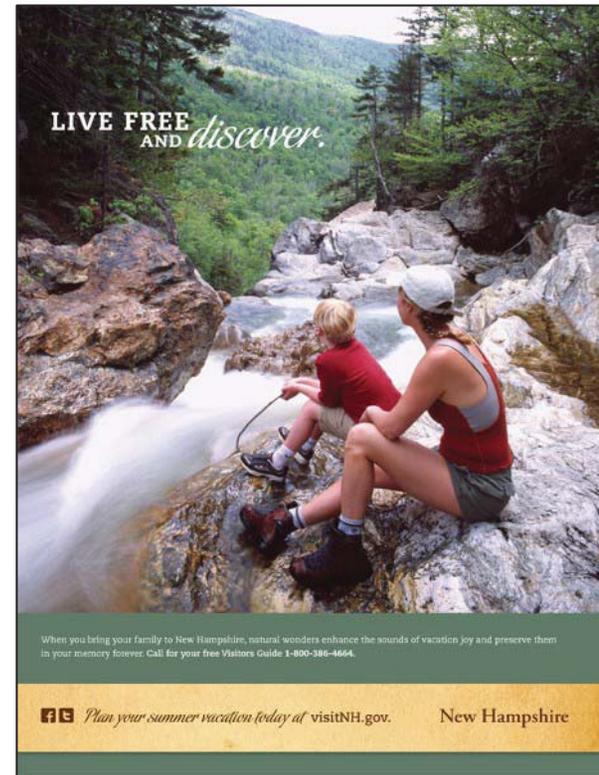
Q13: Which do you find most appealing?

# Concepts with “Live Free” copy are the clear winners



Consistent color palettes

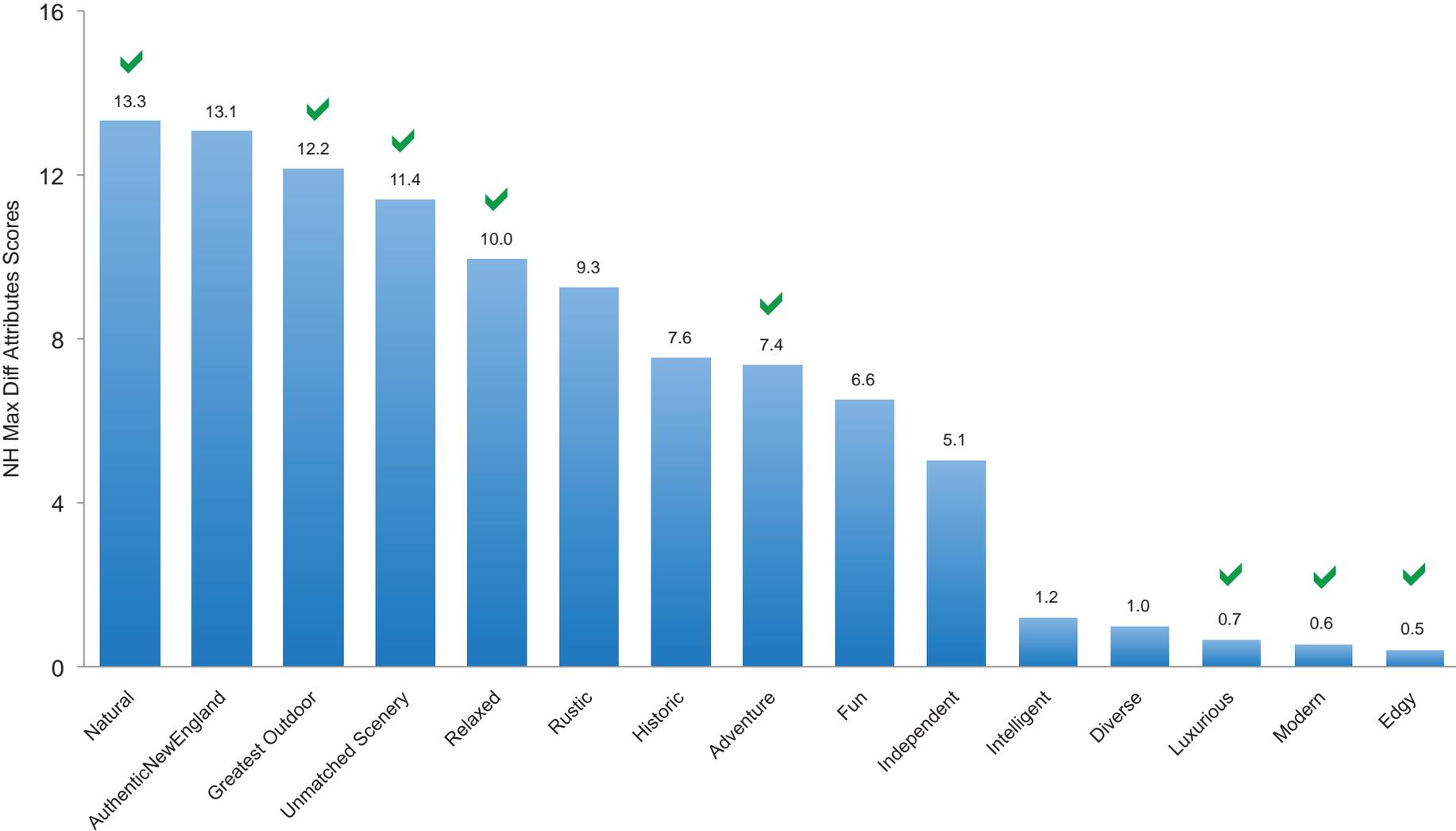
Consistent copy theme – “Live Free”



Kids or families in the picture

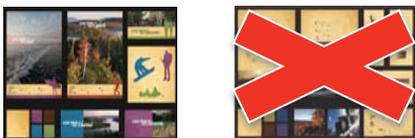
Outdoor Activities

# The pattern of attributes associated with New Hampshire closely parallels the findings from the qualitative phase

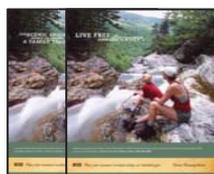


# How far we've traveled!

## Phase 1: Qualitative Testing

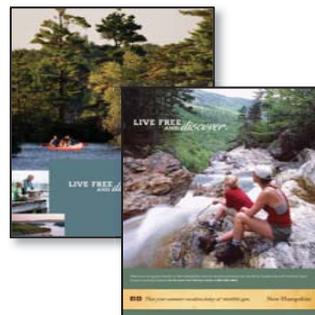


## Phase 2: Quantitative Testing



## Final Refinement

Collage Images with "Live Free" text



## Final In-Market



## Launch with the Live Free and... concept

- ✓ Live Free and... emerged as the most effective copy theme for generating interest in and preference for New Hampshire.
- ✓ For a visual approach, the collage-like setup generated stronger interest and preference particularly among family travelers.

## Launch with the Logo 1



## Key Findings

- ✓ Family travelers and Kids are a strong combination.
- ✓ New Hampshire = Natural
- ✓ Adventure and Fun relate both stronger preference for and connection to New Hampshire.
- ✓ Travelers who have visited NH in the past tend to have a higher likelihood of visiting again.
- ✓ Long-term growth will come from attracting new 1st time visitors.
- ✓ Building memories and creating family bonds are top reasons families with children travel.