

**NEW HAMPSHIRE DIVISION OF TRAVEL & TOURISM DEVELOPMENT
2010 NHDTTD CONSUMER PERCEPTION SURVEY SUMMARY**

ABOUT THE RESEARCH

This is the synopsis of the 2010 NHDTTD Consumer Perception Survey conducted from February through April 2010. Primary research was conducted to develop consumer insights that would inform future marketing strategy and communications for New Hampshire Travel & Tourism. This report summarizes selected findings from the research intended to evaluate targeted consumer attitudes and perceptions of New Hampshire. We are providing data that we believe is most relevant to industry members to help develop or enhance current marketing and advertising programs. This research will also be the platform for developing the new marketing and advertising campaign for NHDTTD.

Consumer Quantitative Survey Results

ADJECTIVES ASSOCIATED WITH NEW HAMPSHIRE

Adjectives	NH %
Beautiful Scenery	89
Authentic New England	82
Safe	79
Family-Oriented	79
Clean	75
Affordable	69
Fun	67
Interesting	64
Friendly	64
Accessible	61
Convenient	58
Independent	55
Slow-Paced Lifestyle	54
Environmentally Responsible	51
Old-Fashioned	49
Popular	48
Conservative	46
Health and Wellness-Focused	37
Engaging	35
Open-Minded	32
Liberal	25
Diverse	23
Innovative	18
Crowded	13
Hip, Cool, Contemporary	12

ACTIVITIES ASSOCIATED WITH NEW HAMPSHIRE

Activities	NH %
Scenic Drives	88
Hiking	87
Leaf-Peeping	85
Skiing	83
Camping	83
Snowmobiling	76
Snowboarding	75
Canoeing/Kayaking	73
History and Heritage	72
Biking	68
Fishing	67
Antiquing	65
Fairs and Festivals	63
Swimming	57
Shopping	57
Maple Sugaring	51
Attractions/Theme Parks	42
Golf	38
Culture and Arts	32
Nightlife	13

Consumer Quantitative Survey Results

PERCEPTIONS SPECIFIC TO NEW HAMPSHIRE

Perceptions	NH %
Is a great place to unwind and relax	82
Is a great place to get away to	76
New Hampshire is an ideal place for a family vacation	73
Quantity of outdoor experiences makes New Hampshire ideal for all age groups	73
Has great state/national parks	71
Diversity of outdoor experiences makes New Hampshire ideal for all age groups	70
Offers great tax-free shopping	67
Great place to experience an adventure	65
Offers great summer sports	64
Offers a good value for the price	64
Offers environmentally-friendly experiences	57
Offers great water sports	56
Offers authentic experiences	55
In-state travel is very convenient	53
Has lots of interesting historic and architectural sites	52
Has rich cultural assets	29
Offers unique local cuisine	29
Has good golf courses	28
Has a strong arts community	27
Is known for good restaurants	21

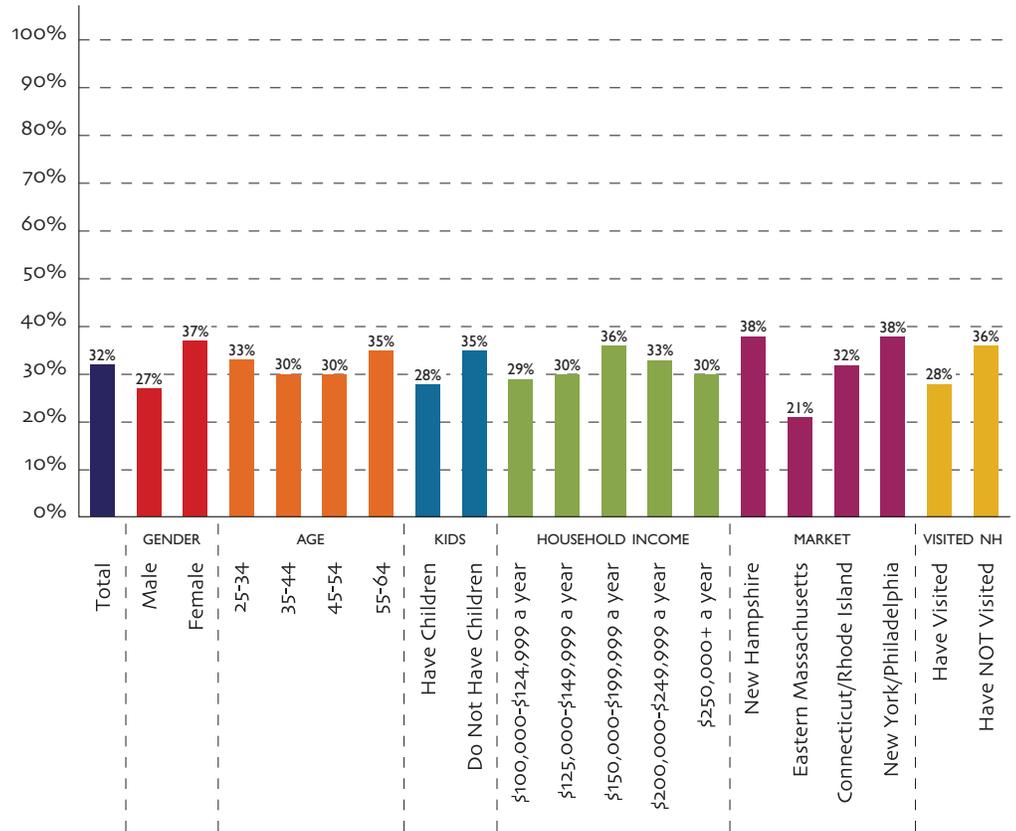
SINGLE ICON THAT CAPTURES THE SPIRIT OF NEW HAMPSHIRE

Icons	NH %
The White Mountains	23
The "Live Free or Die" motto	19
Fall foliage season	14
Mount Washington	8
The "Old Man of the Mountain"	8
No general sales tax or income tax	6
"The Granite State"	6
Lakes and Rivers	3
First in the nation presidential primary	2
The Seacoast	2
Covered Bridges	1

Consumer Quantitative Survey Results

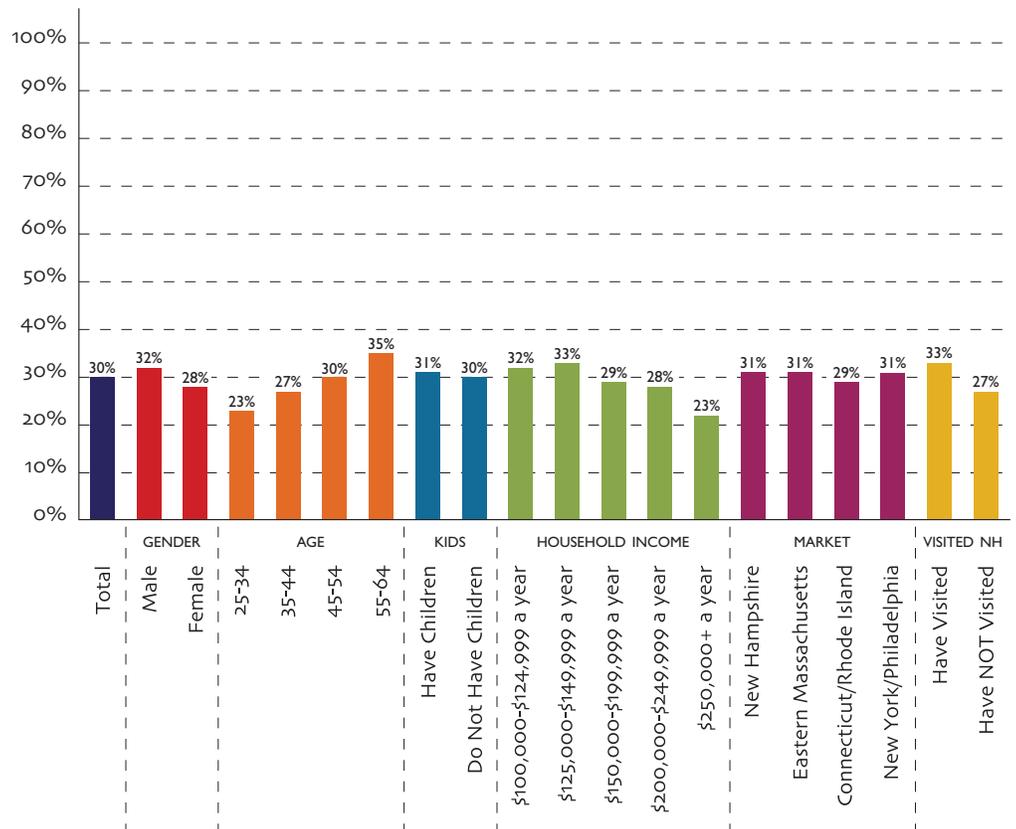
IDEAL VACATION SEASON FOR NEW HAMPSHIRE – FALL

While Fall had highest overall score for *Ideal New Hampshire Vacation Experience*, highest scores were from New Hampshire residents and residents of New York/Philadelphia; lowest score among residents of Eastern Massachusetts and Connecticut/Rhode Island.



IDEAL VACATION SEASON FOR NEW HAMPSHIRE – SUMMER

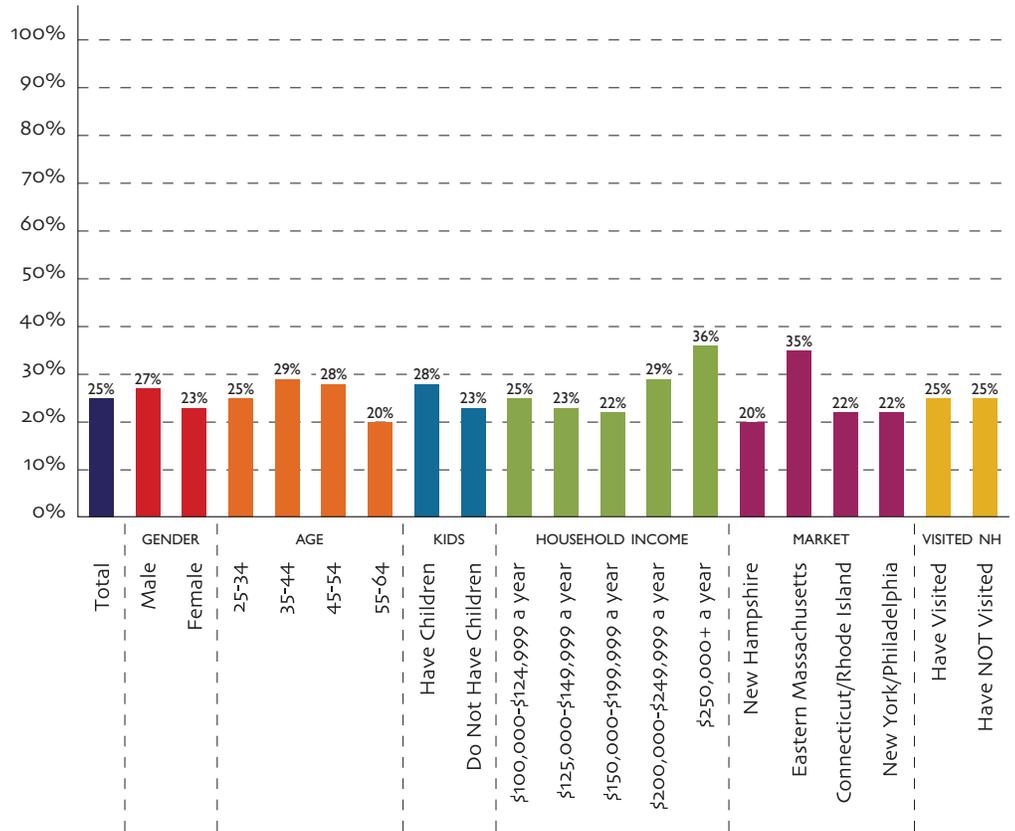
Summer had second highest overall score, with a tie between New Hampshire residents, Eastern Massachusetts and New York/Philadelphia residents. Summer popularity scores in general go down as household income goes up.



Consumer Quantitative Survey Results

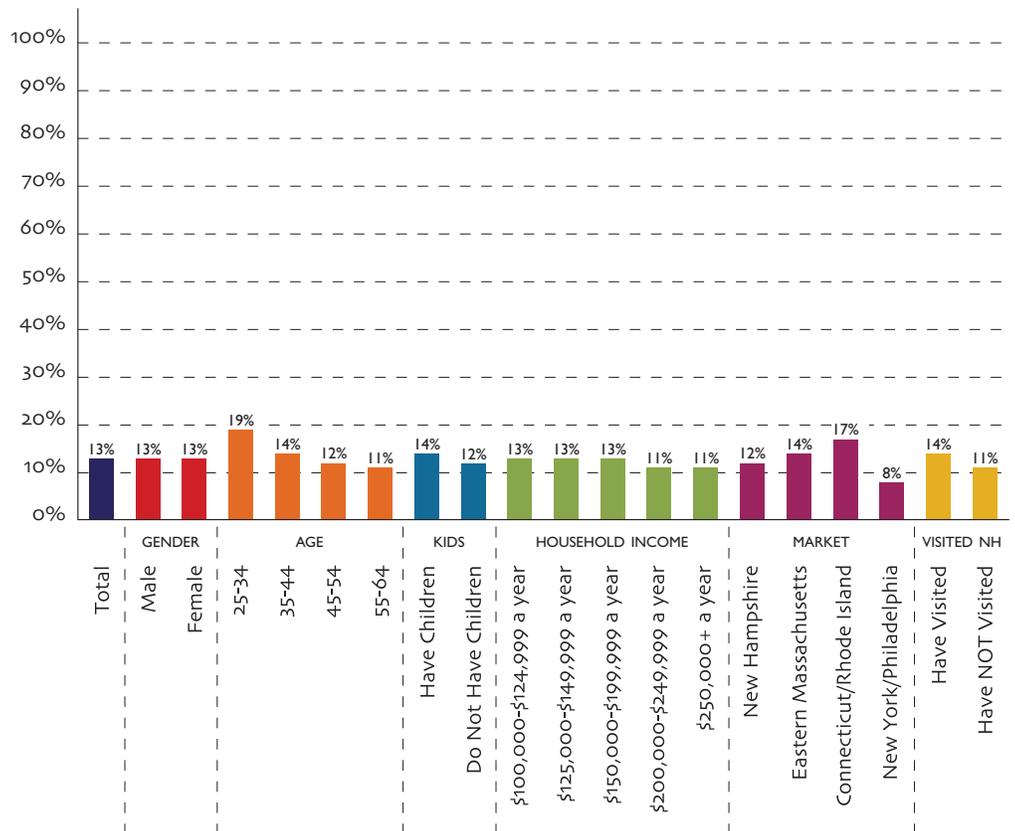
IDEAL VACATION SEASON FOR NEW HAMPSHIRE – WINTER

Winter had third highest overall score, with the single highest score coming from people in households with annual incomes \$250,000+, followed by residents of Eastern Massachusetts.



IDEAL VACATION SEASON FOR NEW HAMPSHIRE – SPRING

Spring had the lowest overall score with peak among respondents aged 25-34; scores relatively even between all household income groups.

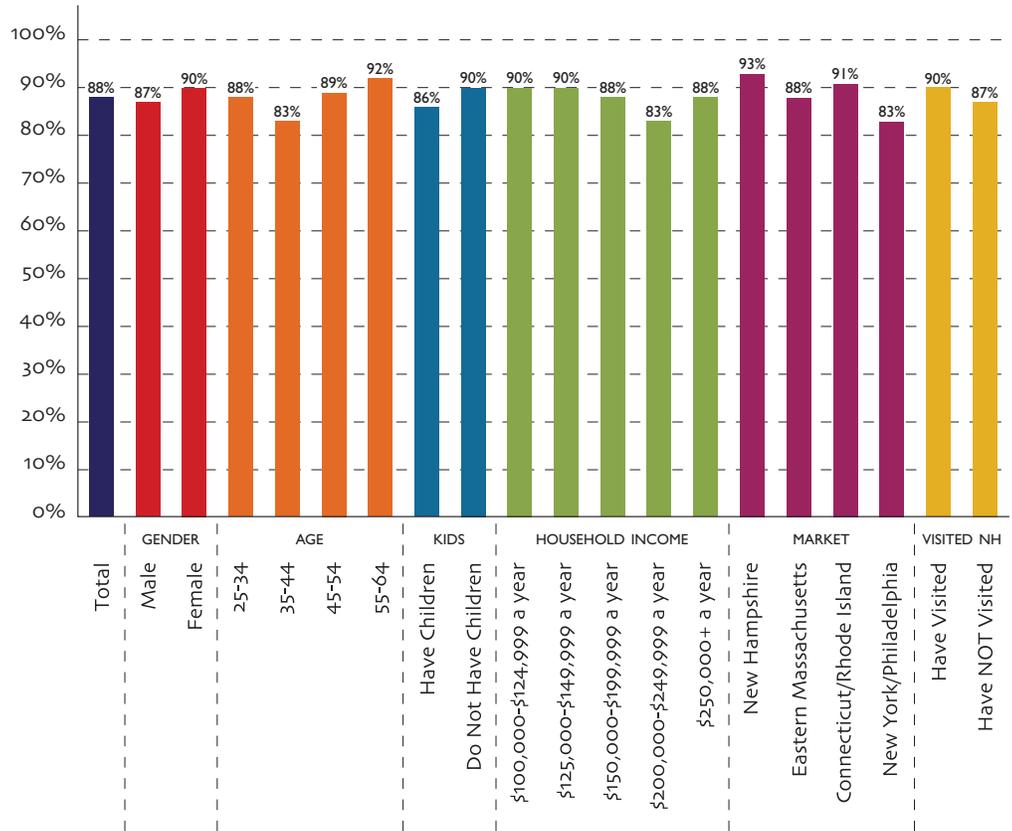


Consumer Quantitative Survey Results

NEW HAMPSHIRE IS ASSOCIATED WITH SCENIC DRIVES

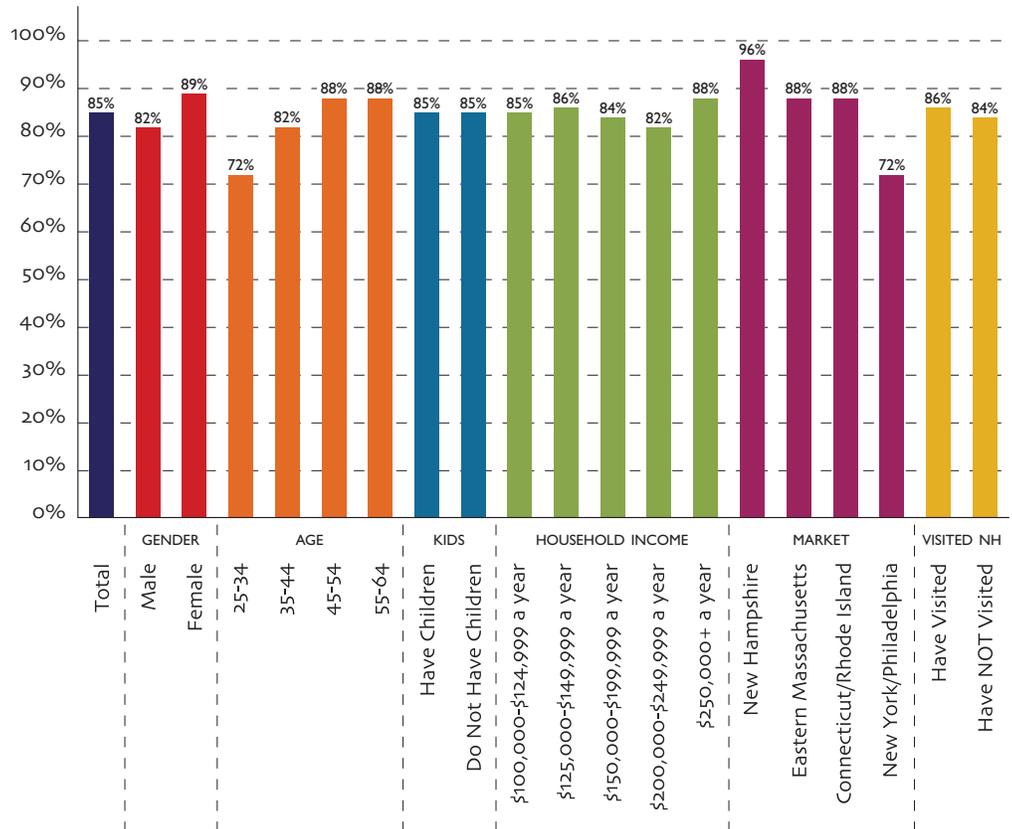
Association scores vary by respondent characteristic but are consistently above 83%.

Even among people who have NOT visited New Hampshire, the association score is 87%.



NEW HAMPSHIRE IS ASSOCIATED WITH LEAF-PEEPING

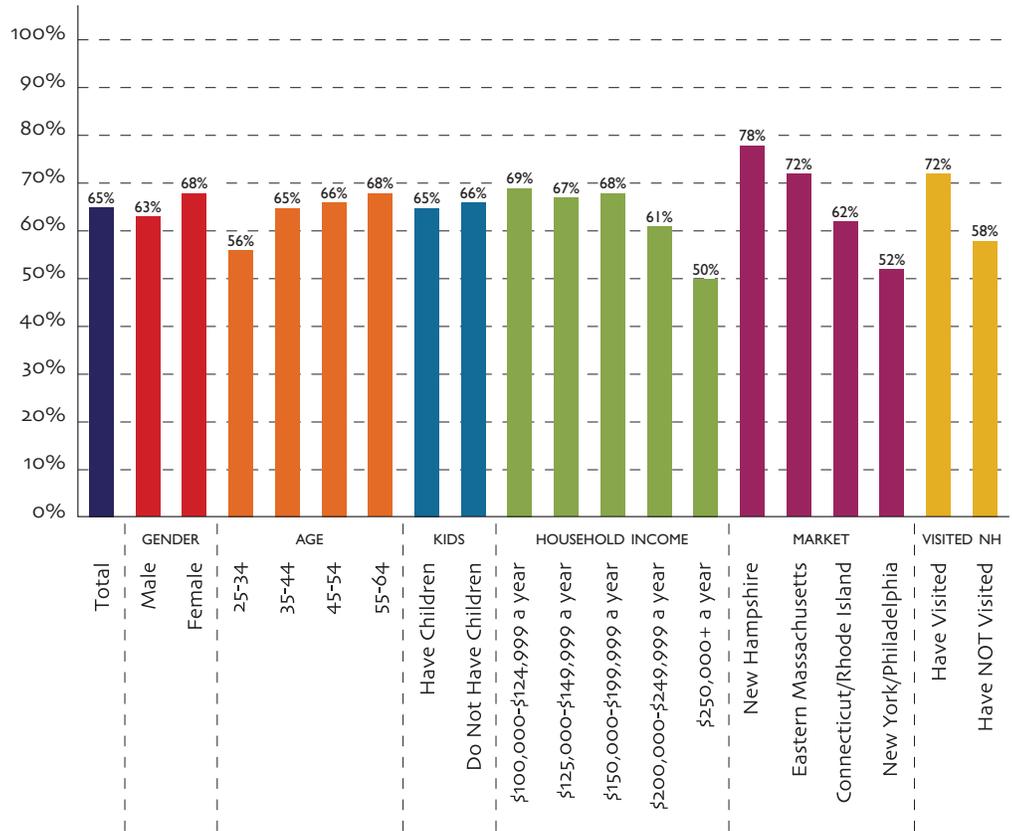
Lowest association scores are among respondents aged 25-34 and people living in New York/Philadelphia.



Consumer Quantitative Survey Results

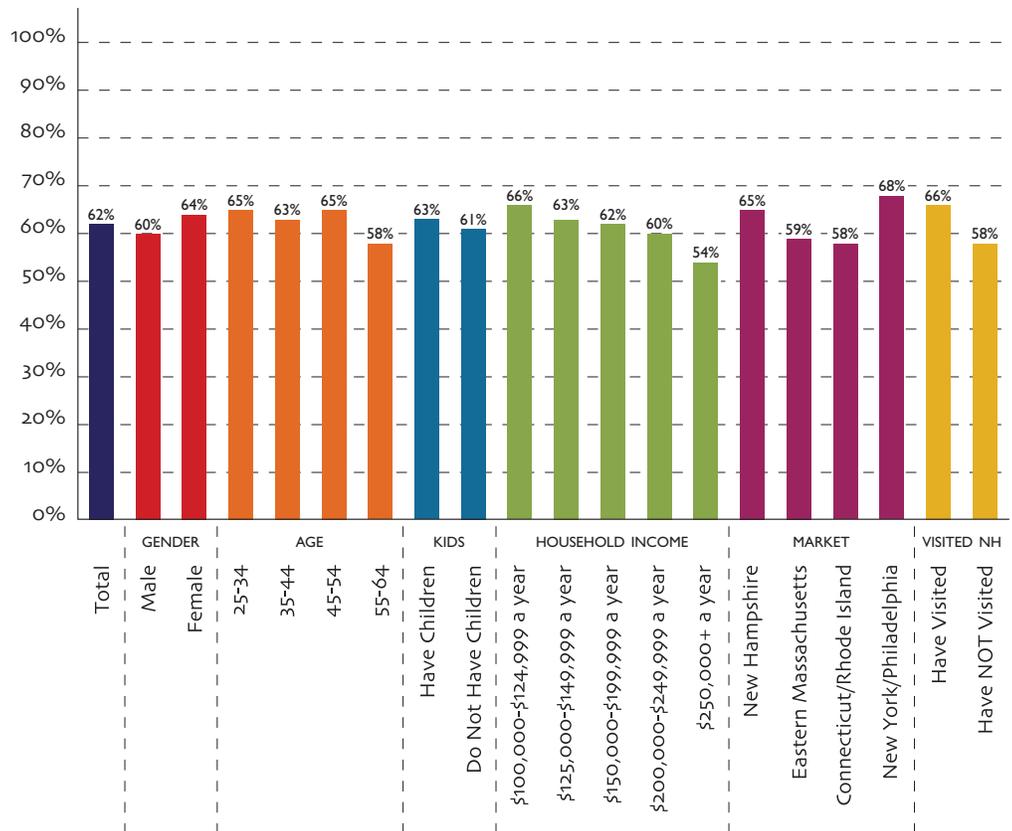
NEW HAMPSHIRE OFFERS LOTS OF THINGS TO SEE AND DO

Scores increase with age, decrease (in general) as household income increases, and decreases with distance from New Hampshire.



NEW HAMPSHIRE HAS FRIENDLY WELCOMING PEOPLE

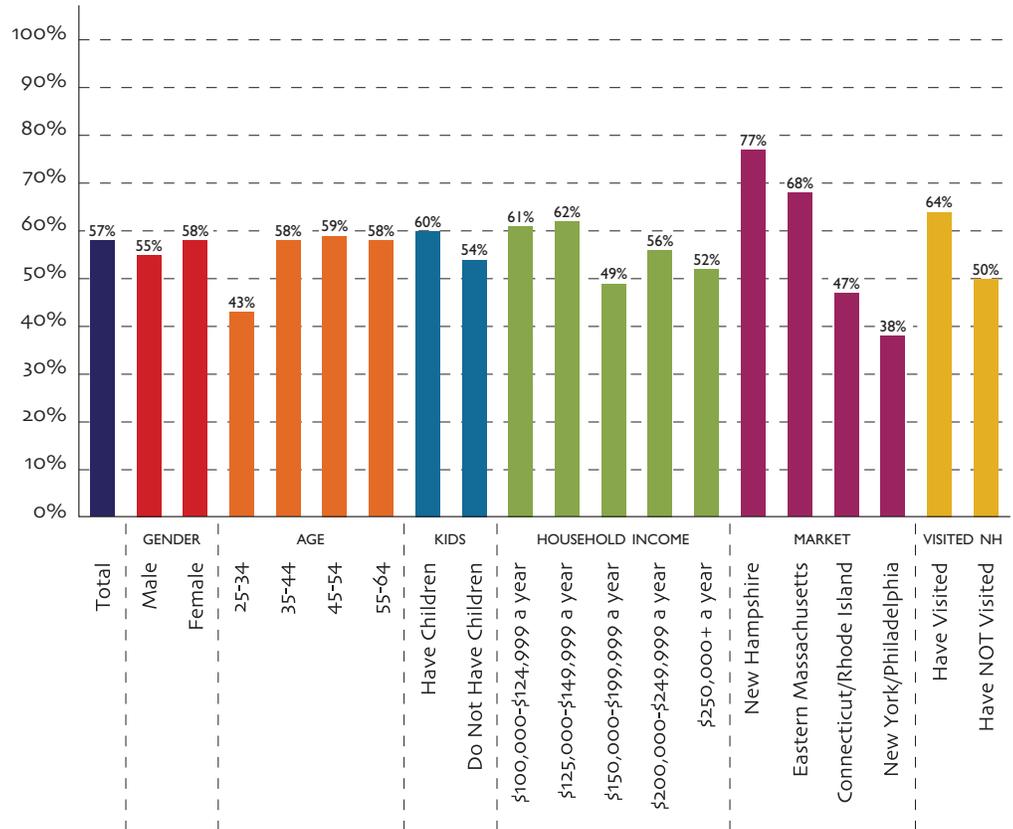
Scores decrease as household income increases, and are about even between respondents with and without children. Disconcerting is the fact that geographically, lowest scores were from residents of Eastern Massachusetts and Connecticut/Rhode Island.



Consumer Quantitative Survey Results

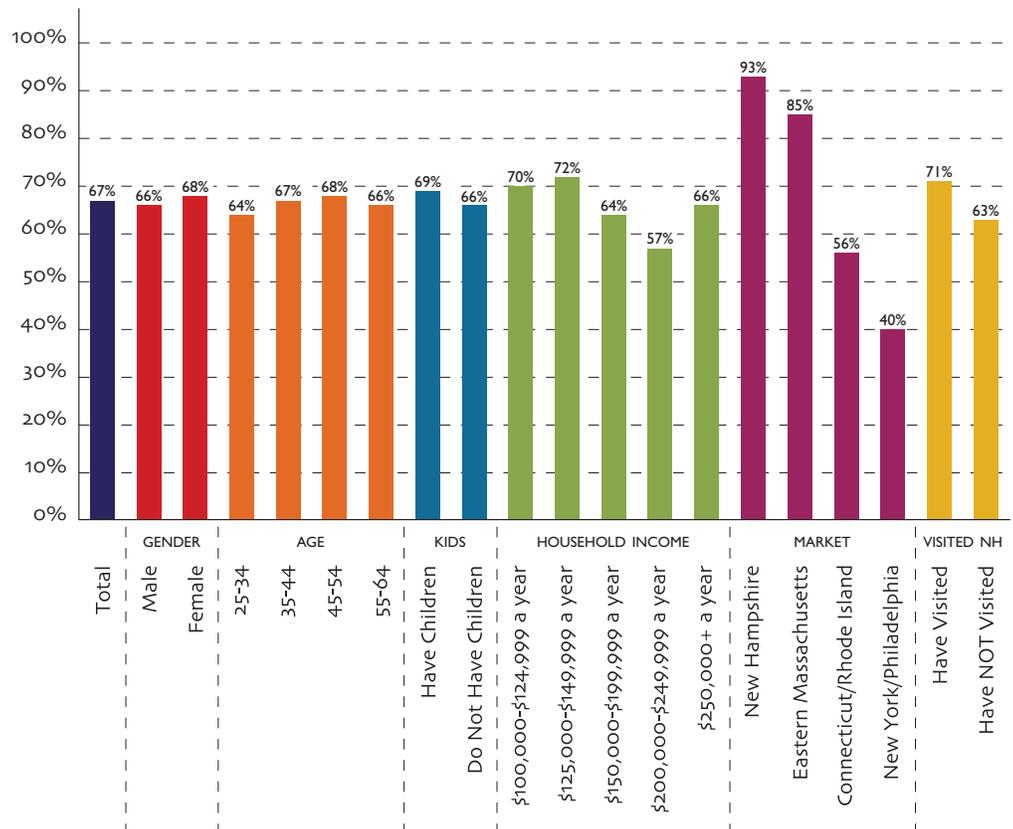
NEW HAMPSHIRE IS ASSOCIATED WITH SHOPPING

There is a wide swing of scores within most respondent groups: lowest scores going to Adults 25-34, respondents who do not have children, household income group \$150,000 - \$199,999 per year, respondents from New York/Philadelphia and those who have NOT visited New Hampshire.



NEW HAMPSHIRE OFFERS GREAT TAX-FREE SHOPPING

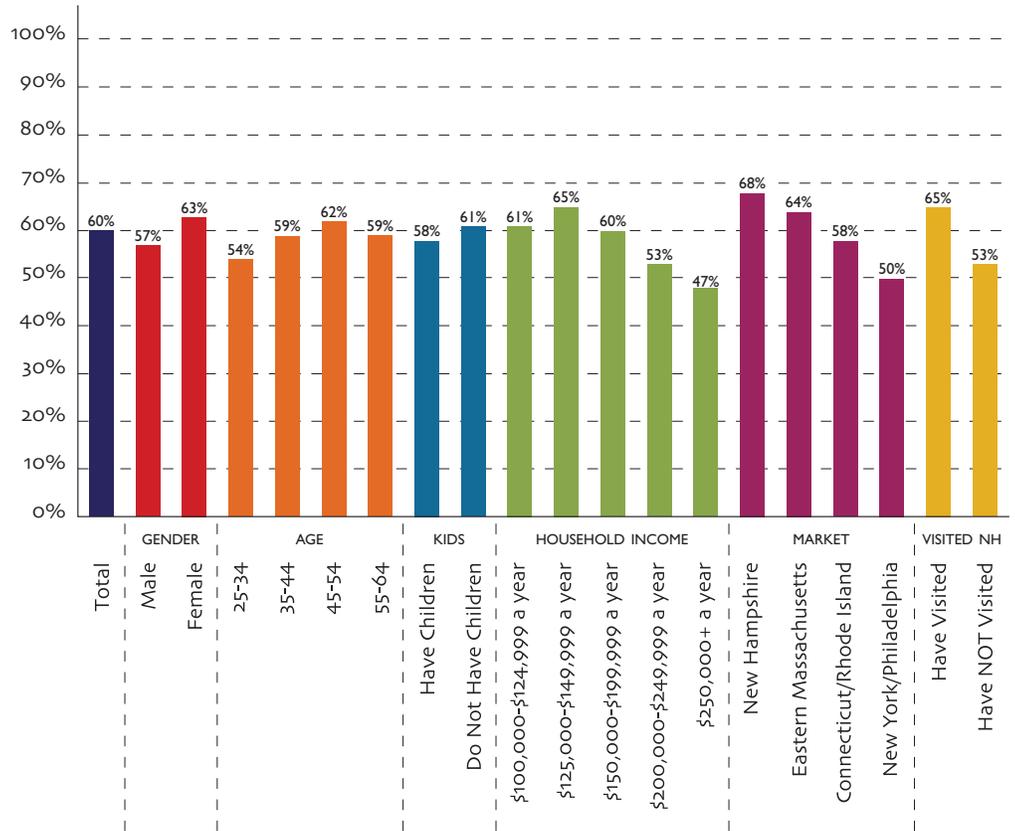
There are reasonable agreement scores across consumer quantitative characteristics with the exception of market, where agreement scores decrease as distance from New Hampshire increases.



Consumer Quantitative Survey Results

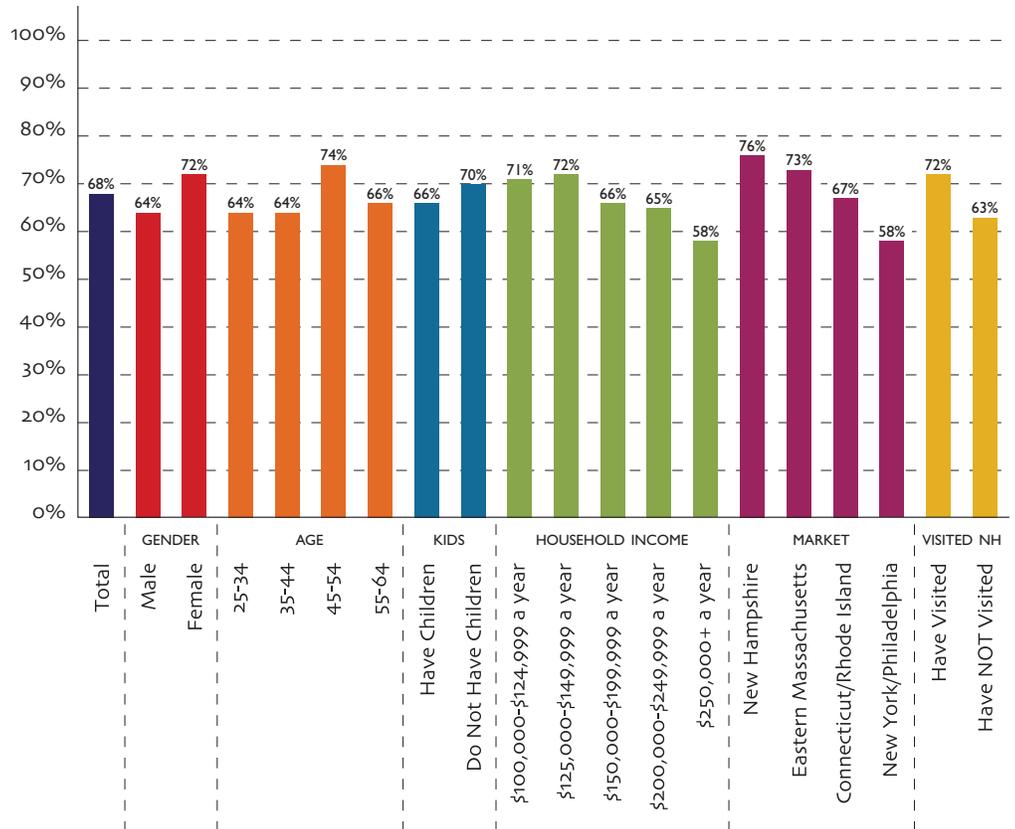
NEW HAMPSHIRE HAS HIGH QUALITY LODGING ACCOMODATIONS

Scores for *High Quality Accommodations* peak with respondents aged 45-54 and is lower for all other age groups. The further away from New Hampshire the lower the score.



NEW HAMPSHIRE HAS A VARIETY OF LODGING TYPES AT DIFFERENT PRICE POINTS

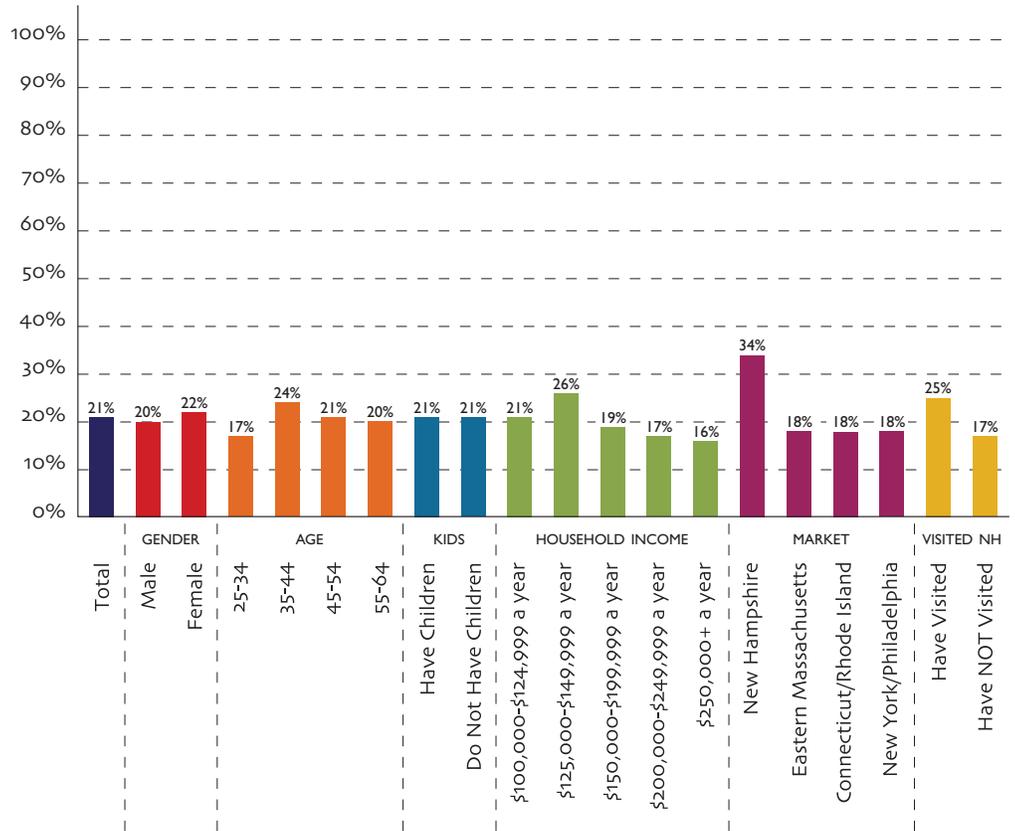
Overall scores for *Variety of Lodging Types at Different Price Points* are significantly higher than those for *High Quality Accommodations*; however, the highest score was among respondents aged 45-54, and again, the further away from New Hampshire the lower the score.



Consumer Quantitative Survey Results

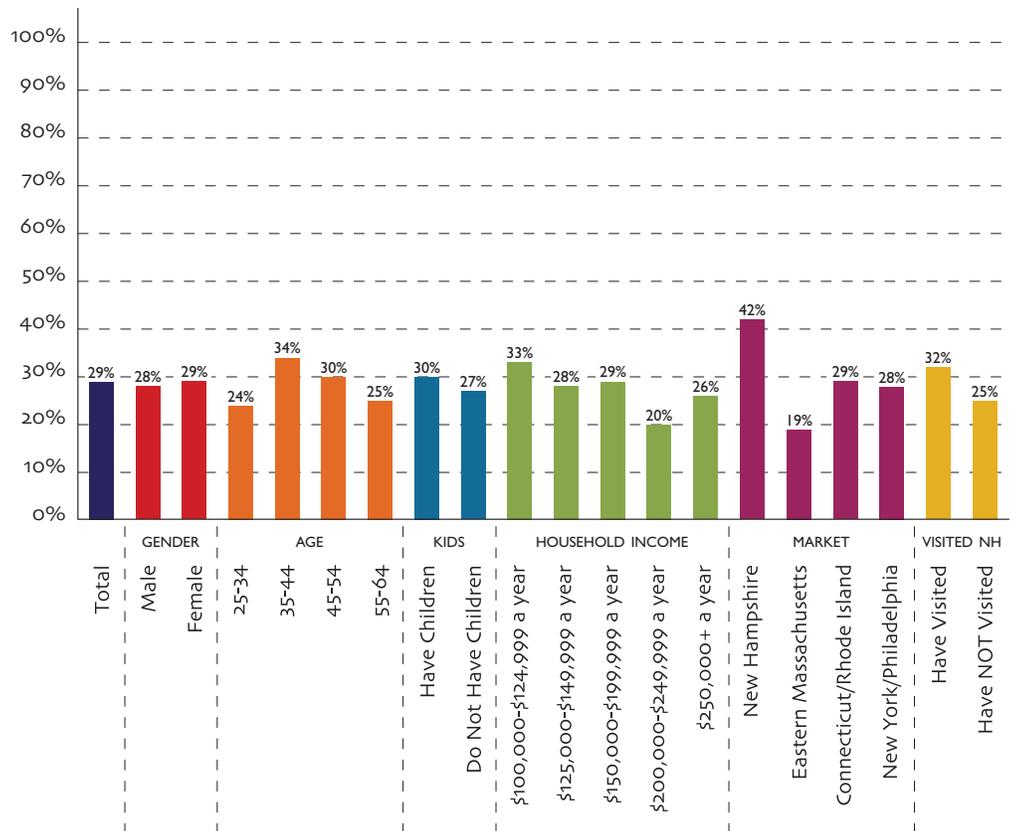
NEW HAMPSHIRE IS KNOWN FOR GOOD RESTAURANTS

New Hampshire residents scored *New Hampshire is Known for Good Restaurants* higher than any other group and at a mere 34%. Distance from New Hampshire doesn't seem to have impacted scores, with the exception of respondents with household incomes between \$125,000 and \$149,999.



NEW HAMPSHIRE OFFERS UNIQUE LOCAL CUISINE

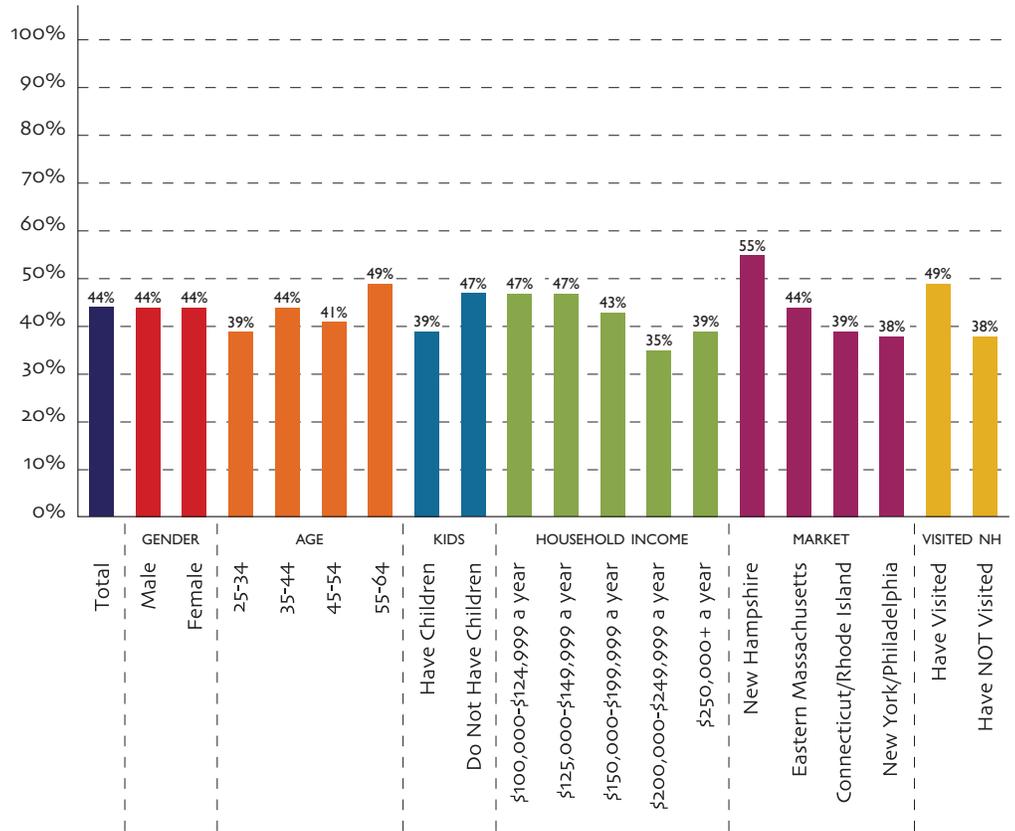
Again New Hampshire residents scored the statement *New Hampshire Offers Unique Local Cuisine* highest at 42%, with the lowest score from residents of Eastern Massachusetts.



Consumer Quantitative Survey Results

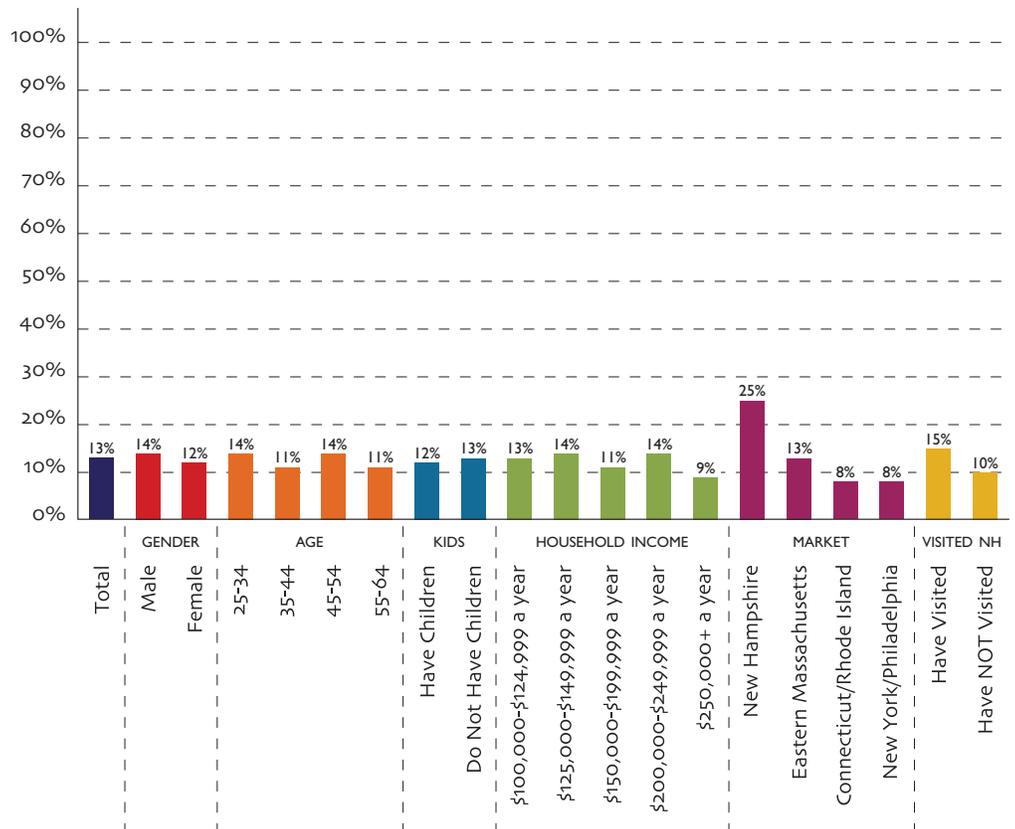
NEW HAMPSHIRE OFFERS HIGH QUALITY RESTAURANTS

Happily, scores for the statement *New Hampshire Offers High Quality Restaurants* were considerably higher in all age groups with the highest scores among respondents living in New Hampshire, respondents aged 55-64, and respondents who have visited New Hampshire.



NEW HAMPSHIRE IS ASSOCIATED WITH NIGHTLIFE

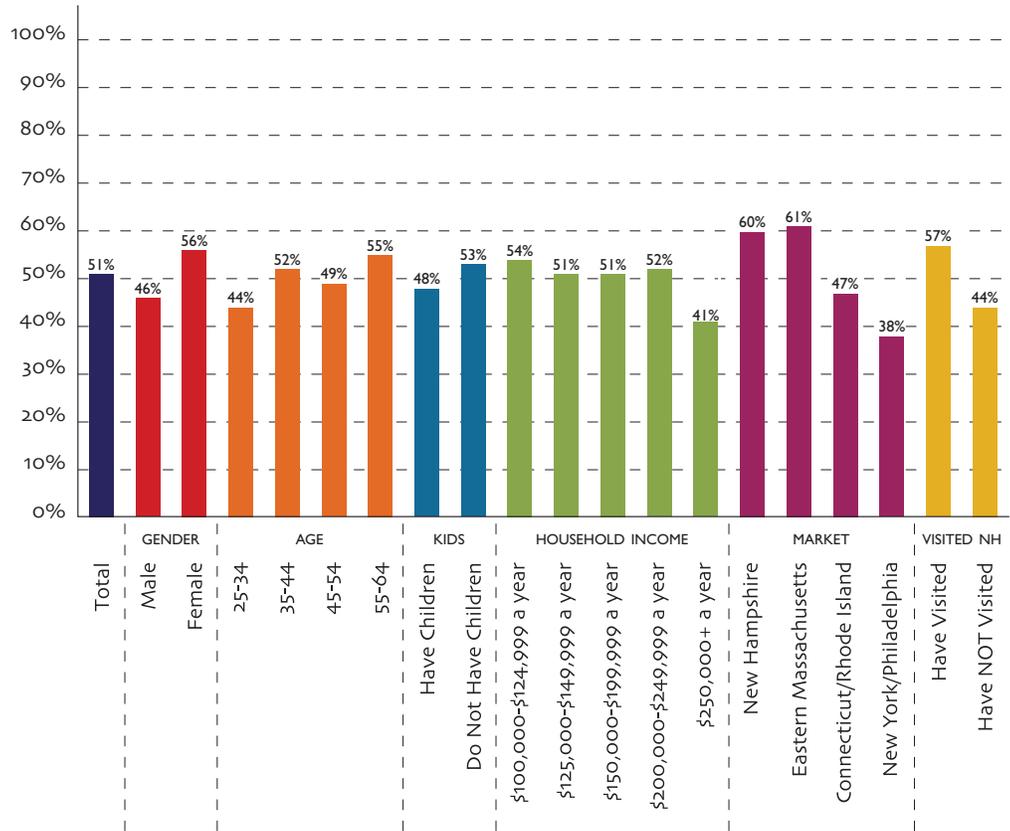
Perhaps because nightlife is not associated with a state offering so much outdoor recreation, scores for *New Hampshire is Associated with Nightlife* are quite low. Even respondents who are New Hampshire residents scored *Nightlife* at a mere 25%. Scores this low suggest a considerable challenge for New Hampshire's nightlife venues.



Consumer Quantitative Survey Results

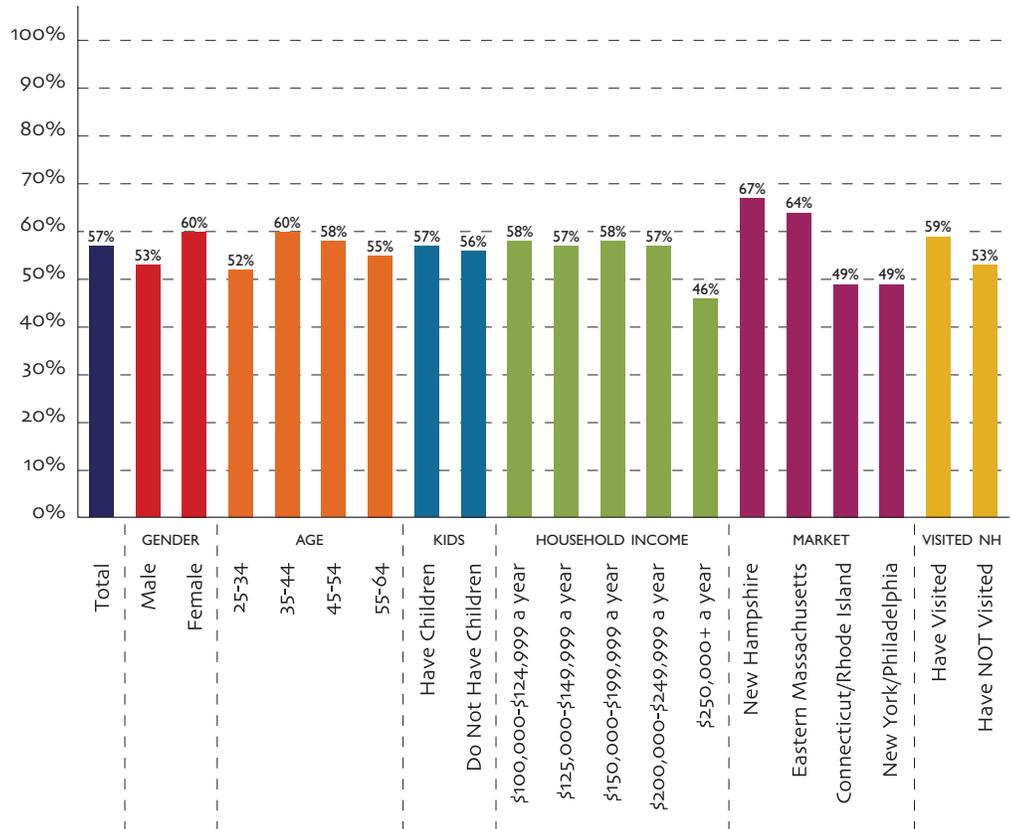
NEW HAMPSHIRE OFFERS LOTS OF QUALITY ATTRACTIONS

Of some concern are the scores for *Offers Lots of Quality Attractions*. Highest scores of 60% and 61% are from respondents who live in New Hampshire and Eastern Massachusetts, with the lowest score from residents of New York/Philadelphia and household incomes of \$250,000+ per year.



NEW HAMPSHIRE OFFERS A VARIETY OF ATTRACTIONS AT DIFFERENT PRICE POINTS

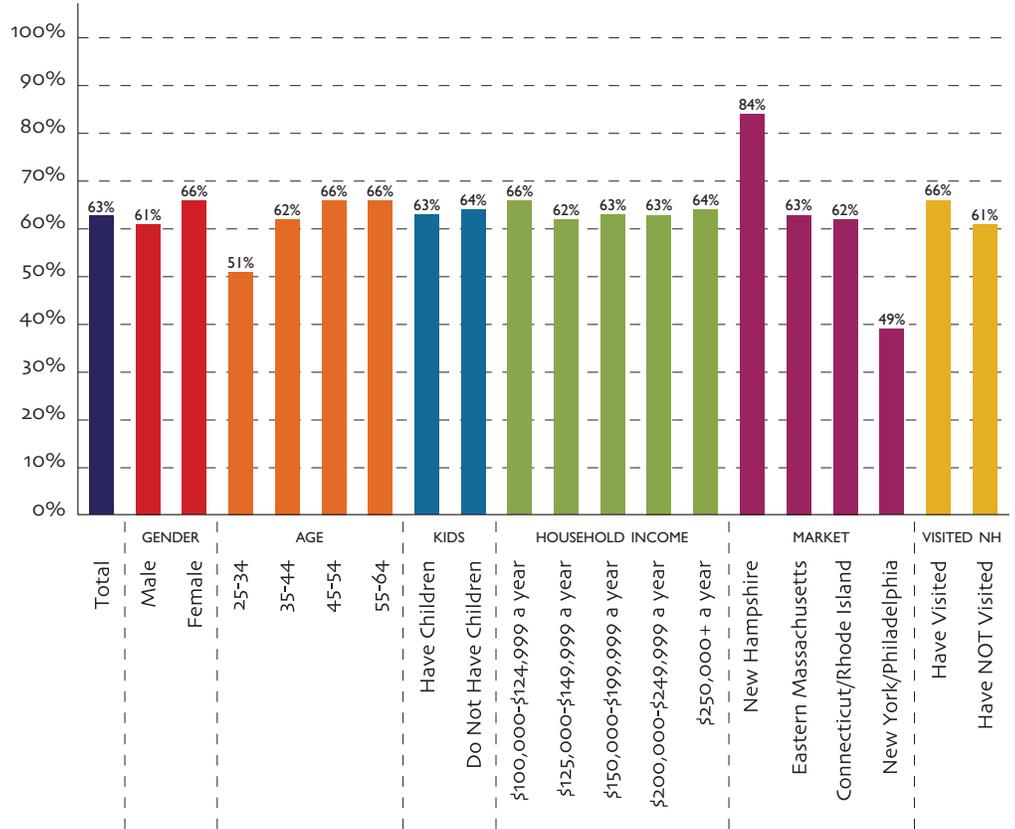
Overall scores for *Offers a Variety of Attractions at Different Price Points* are somewhat higher than for *Lots of Quality Attractions* with—again—the two highest scores coming from residents of New Hampshire and Eastern Massachusetts.



Consumer Quantitative Survey Results

NEW HAMPSHIRE IS ASSOCIATED WITH FAIRS AND FESTIVALS

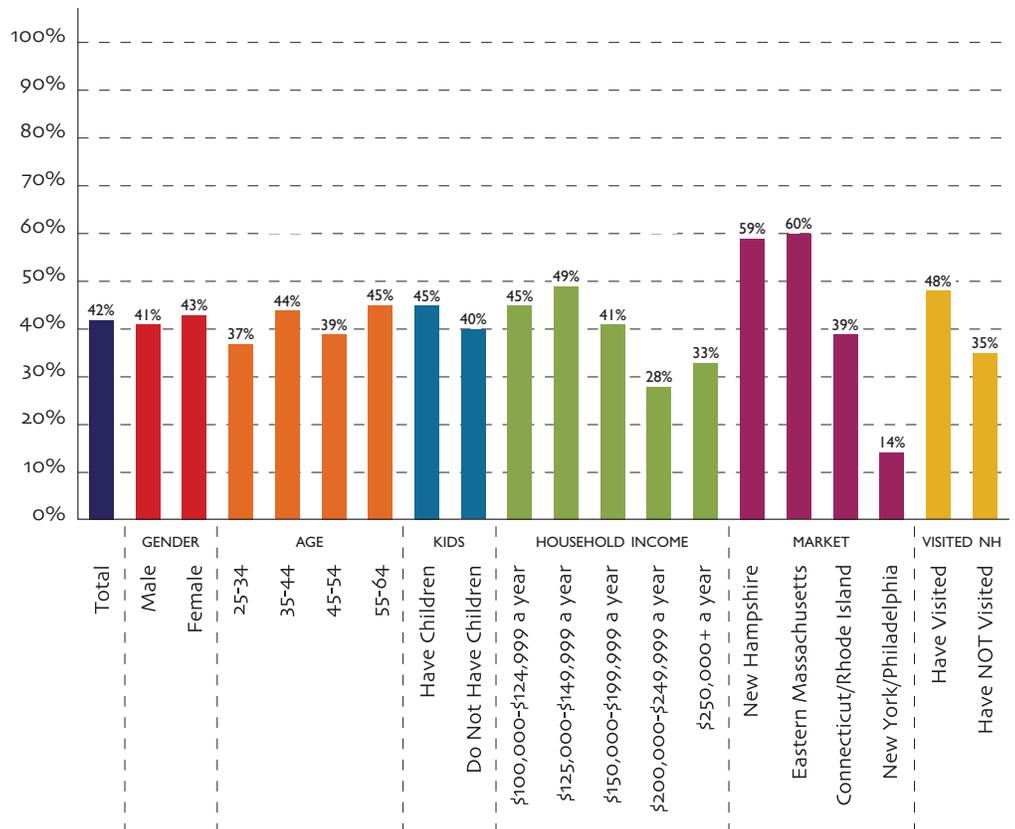
Association scores are significantly lower among adults 25-34 and people who live in New York/Philadelphia.



NEW HAMPSHIRE IS ASSOCIATED WITH ATTRACTIONS AND THEME PARKS

New Hampshire is not strongly associated with *Attractions and Theme Parks* among consumers.

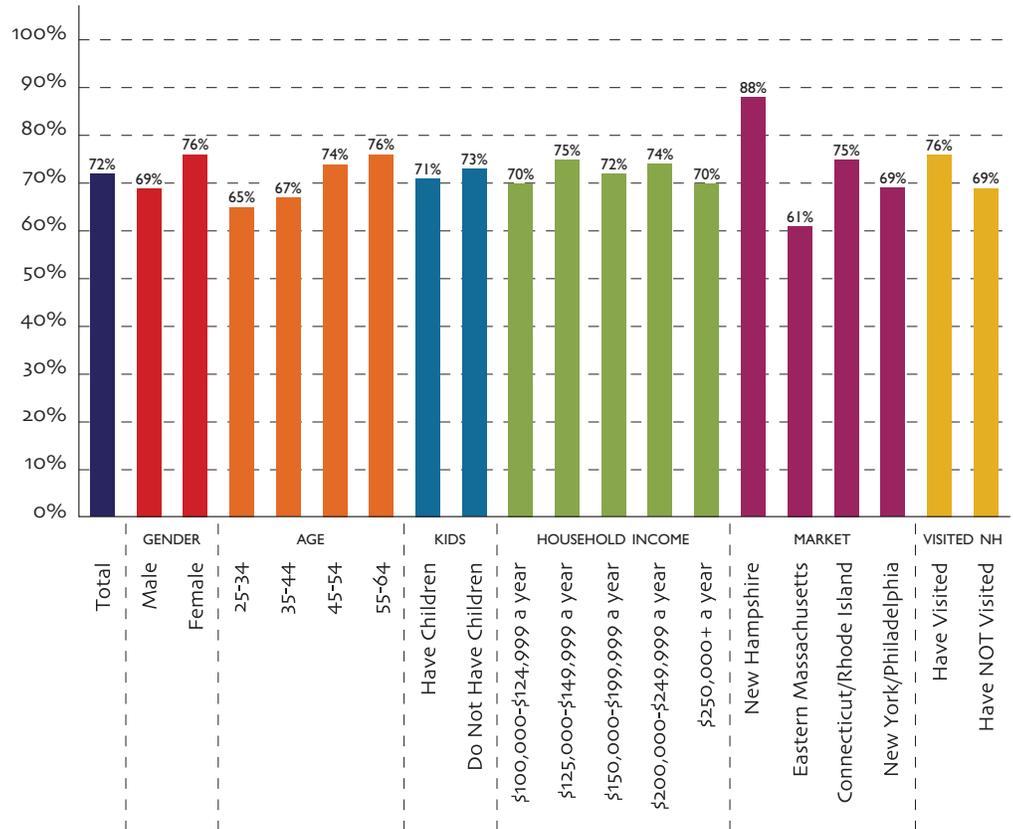
The two highest scores are from residents of New Hampshire (59%) and residents of Eastern Massachusetts (60%).



Consumer Quantitative Survey Results

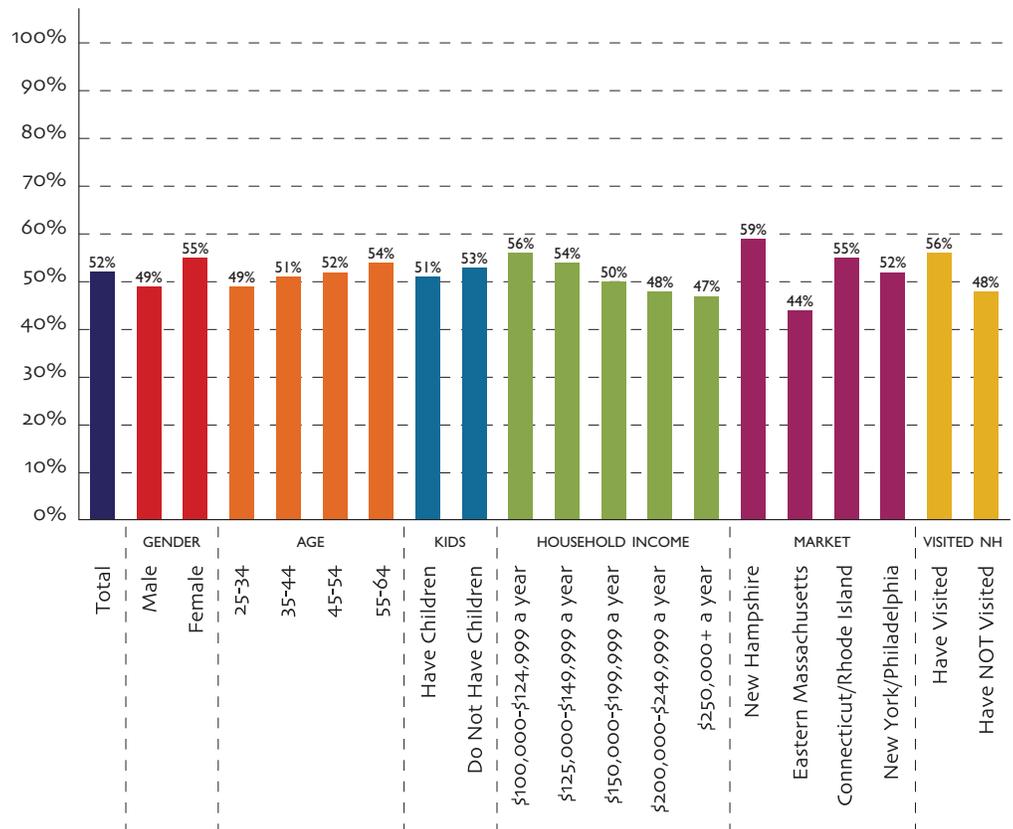
NEW HAMPSHIRE IS ASSOCIATED WITH HISTORY AND HERITAGE

Association scores are higher among respondents living in Connecticut/Rhode Island and New York/Philadelphia than in Eastern Massachusetts.



NEW HAMPSHIRE HAS LOTS OF INTERESTING HISTORICAL & ARCHITECTURAL SITES

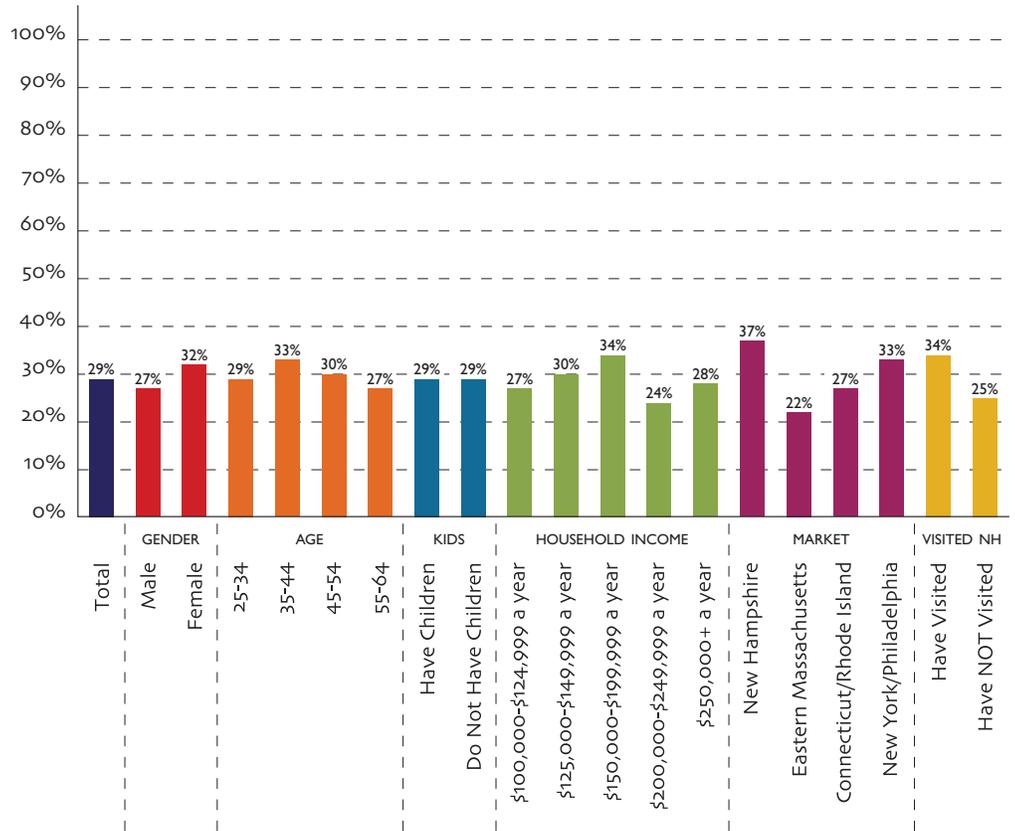
Scores for *New Hampshire Has Lots of Interesting Historical and Architectural Sites* are considerably lower than the scores for having *History & Heritage*. Useful to note that the lowest score geographically is from respondents living in Eastern Massachusetts. These respondents may believe that in comparison to Massachusetts' history and architecture, New Hampshire doesn't have as many interesting historical and architectural sites.



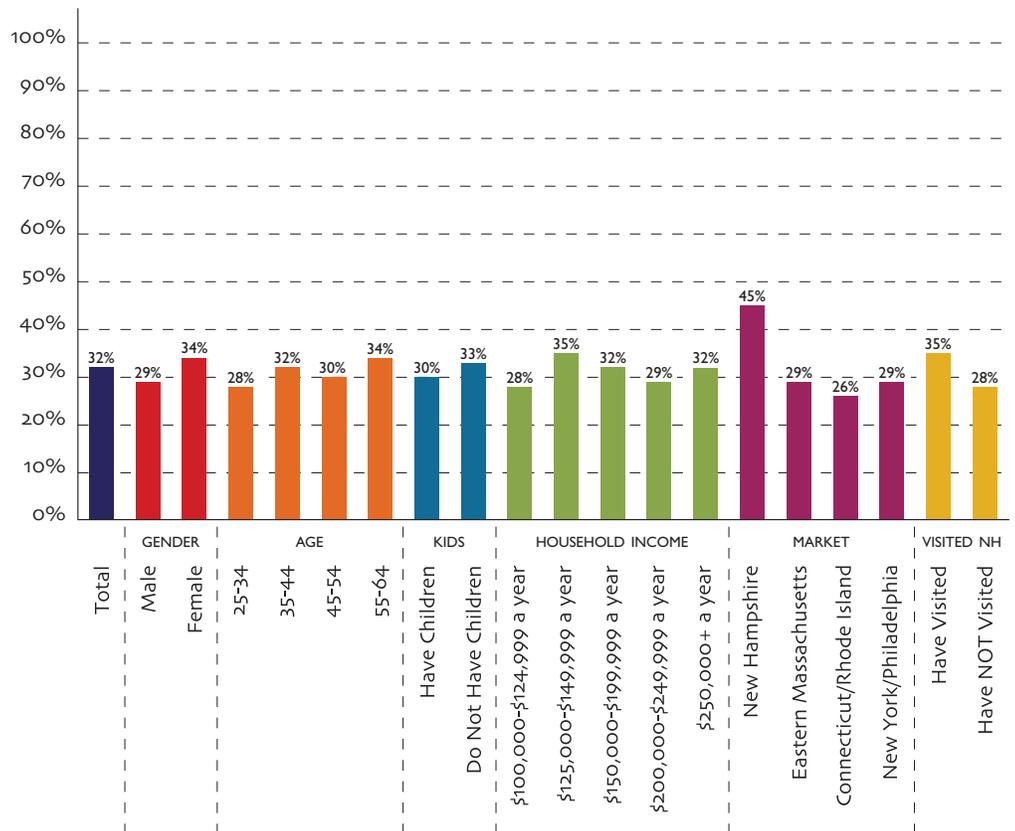
Consumer Quantitative Survey Results

NEW HAMPSHIRE HAS RICH CULTURAL ASSETS

Each of these charts is saying the same thing: a low percentage of respondents believe New Hampshire has *Rich Cultural Assets* and a low percentage of respondents associate New Hampshire with *Culture & Arts*. Highest scores are New Hampshire residents with a 37% and 45% respectively. Scores within other demographic groups do not fluctuate significantly.



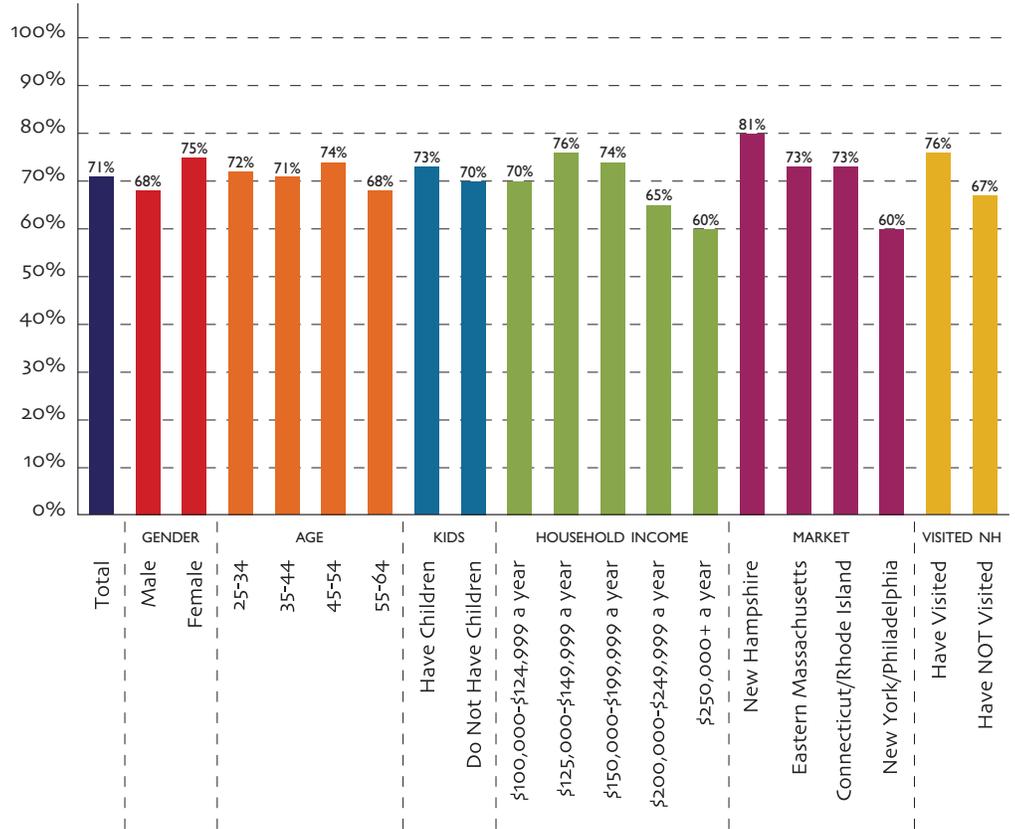
NEW HAMPSHIRE IS ASSOCIATED WITH CULTURE & ARTS



Consumer Quantitative Survey Results

NEW HAMPSHIRE HAS GREAT STATE AND NATIONAL PARKS

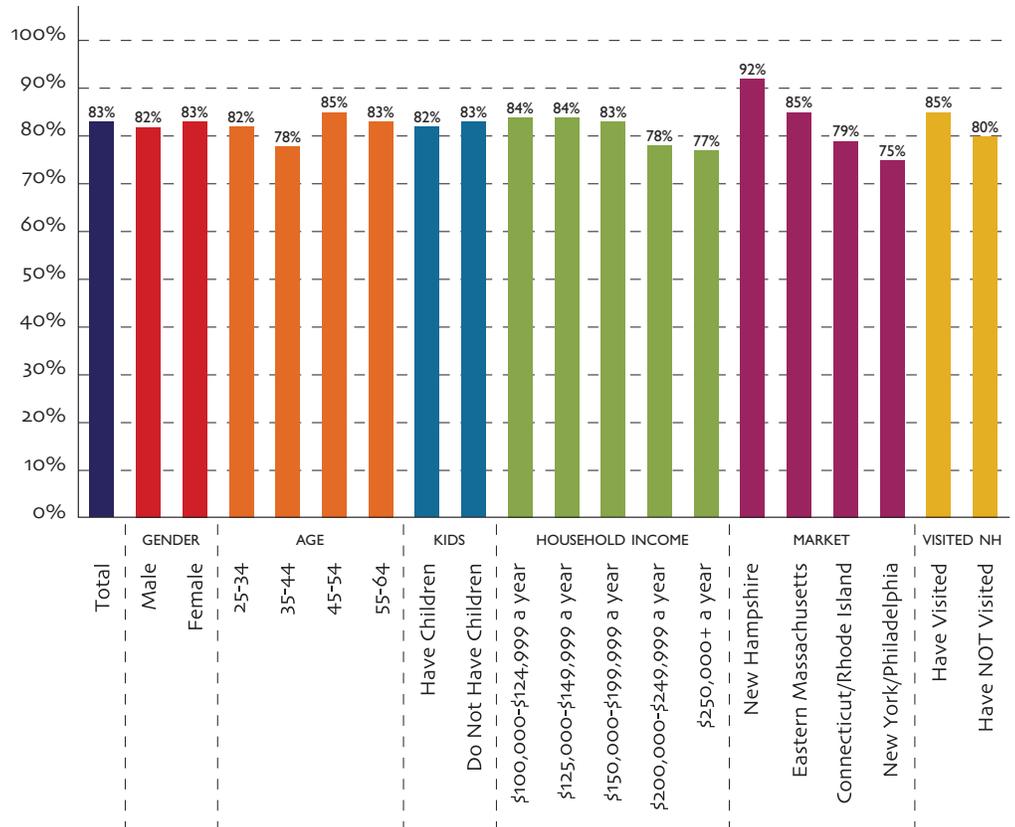
Over 70% of respondents agreed New Hampshire has *Great State and National Parks*. As expected, the highest percentage was among New Hampshire residents and the lowest scores are from respondents living in New York/Philadelphia and among respondents with annual incomes of \$250,000+.



NEW HAMPSHIRE IS ASSOCIATED WITH CAMPING

Scores are fairly consistent across respondent characteristics.

Association scores decrease with distance from New Hampshire.

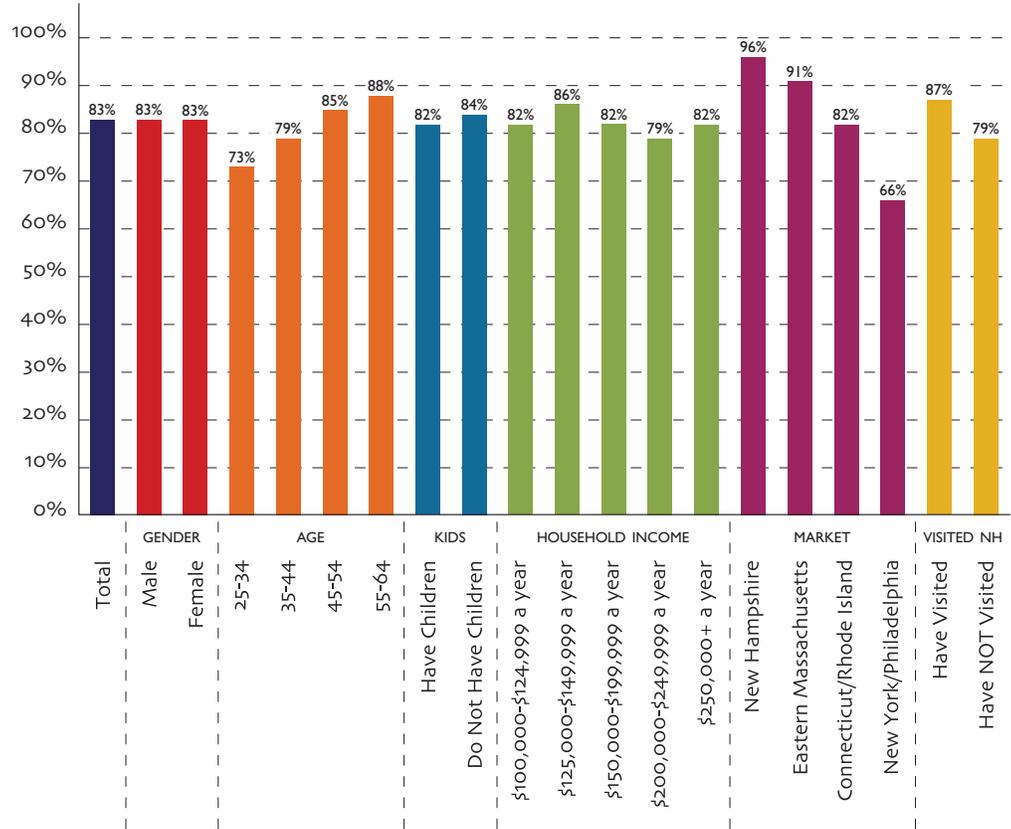


Consumer Quantitative Survey Results

NEW HAMPSHIRE IS ASSOCIATED WITH SKIING

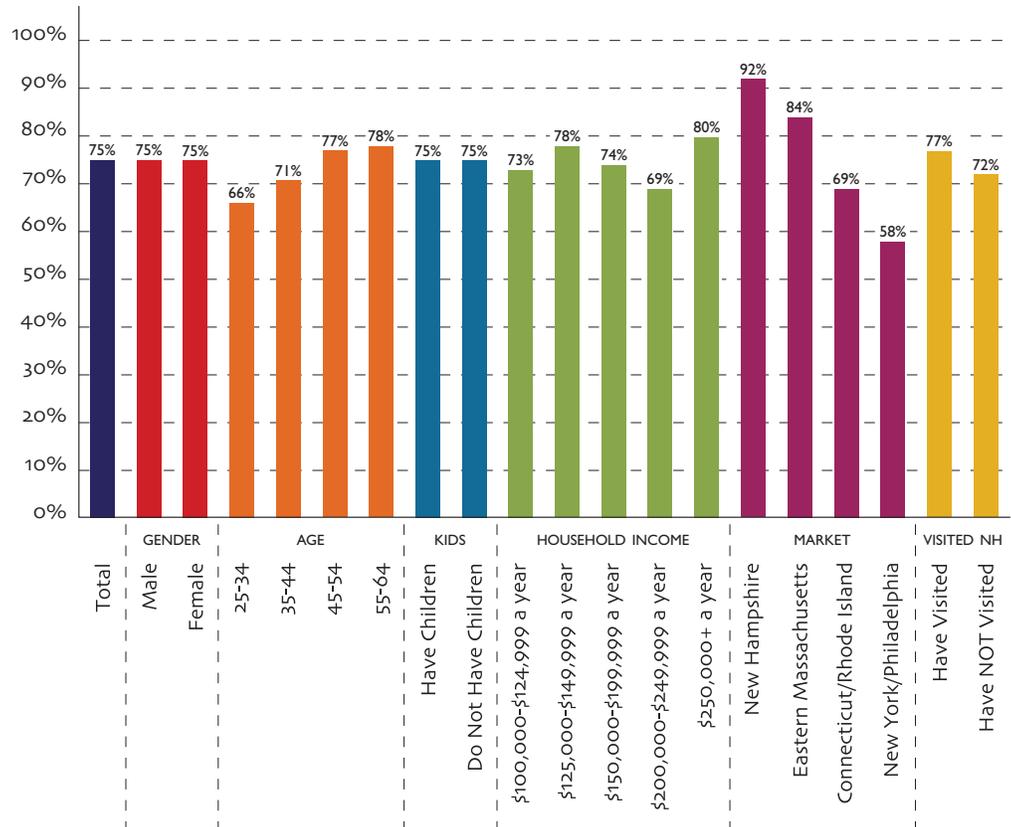
Highest scores are from respondents who are residents of New Hampshire and Eastern Massachusetts

Lowest scores are from respondents aged 25-34 and respondents living in New York/Philadelphia.



NEW HAMPSHIRE IS ASSOCIATED WITH SNOWBOARDING

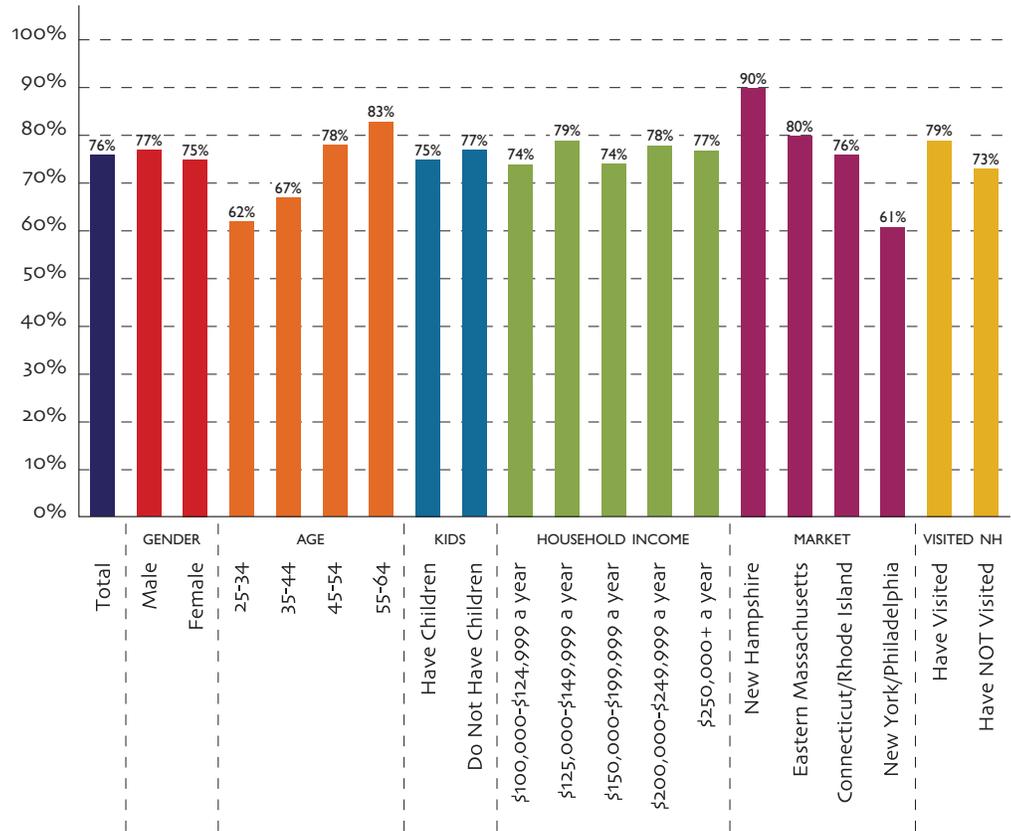
Three quarters of the total sample associate or strongly associate New Hampshire with *Snowboarding*. Association increases with age and decreases with distance from New Hampshire. The pattern is the same for *Skiing*.



Consumer Quantitative Survey Results

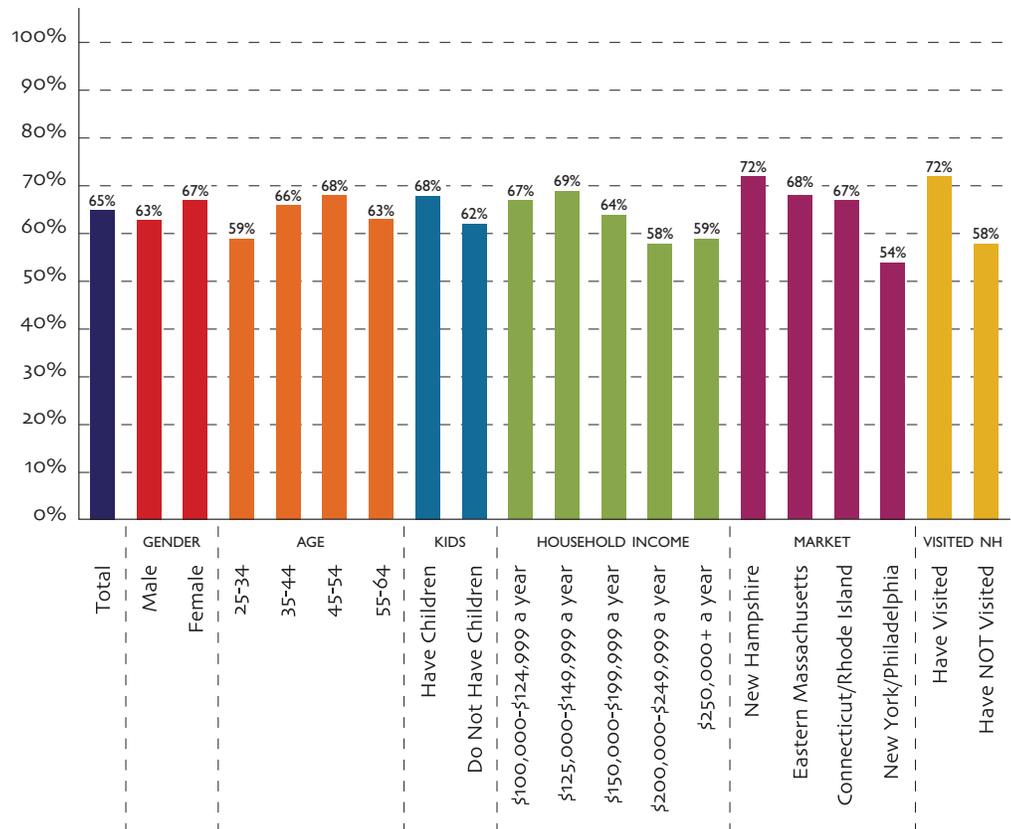
NEW HAMPSHIRE IS ASSOCIATED WITH SNOWMOBILING

Three quarters of the total sample associate or strongly associate New Hampshire with *Snowmobiling*. Association increases with age and decreases with distance from New Hampshire.



NEW HAMPSHIRE IS A GREAT PLACE TO EXPERIENCE AN ADVENTURE

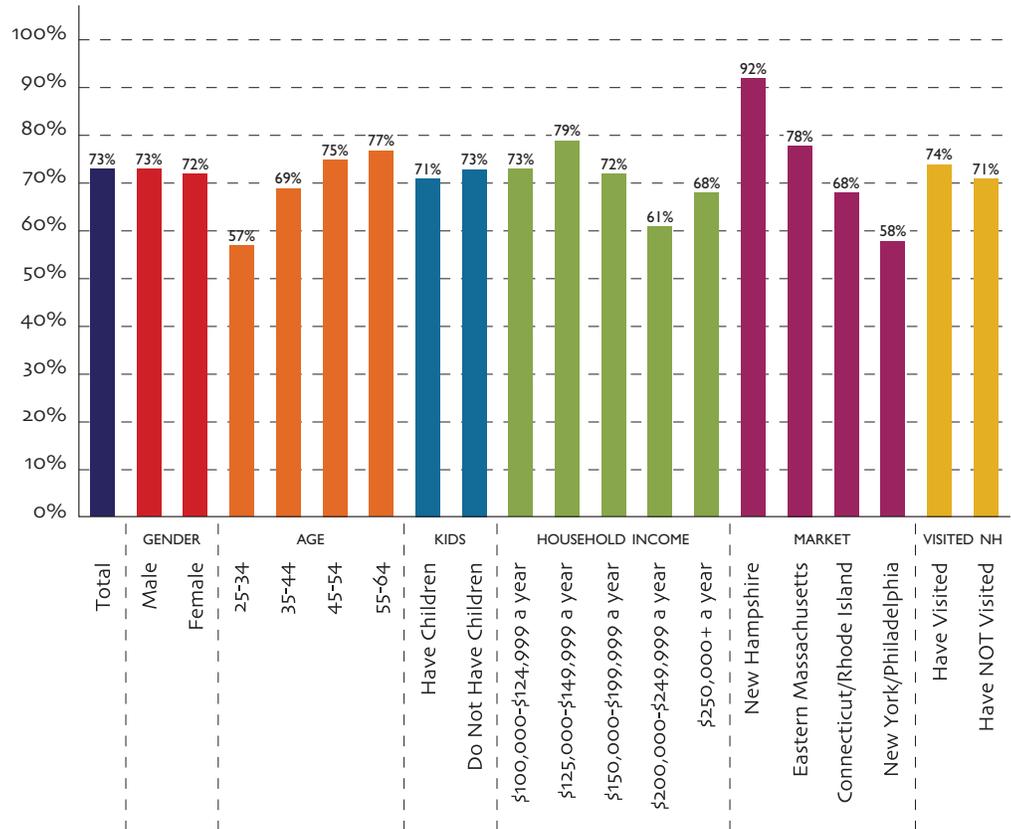
Over 70% of respondents who have visited New Hampshire agree or strongly agree that *New Hampshire is a Great Place to Experience an Adventure*. The lowest percentage of agreement was from New York/Philadelphia respondents.



Consumer Quantitative Survey Results

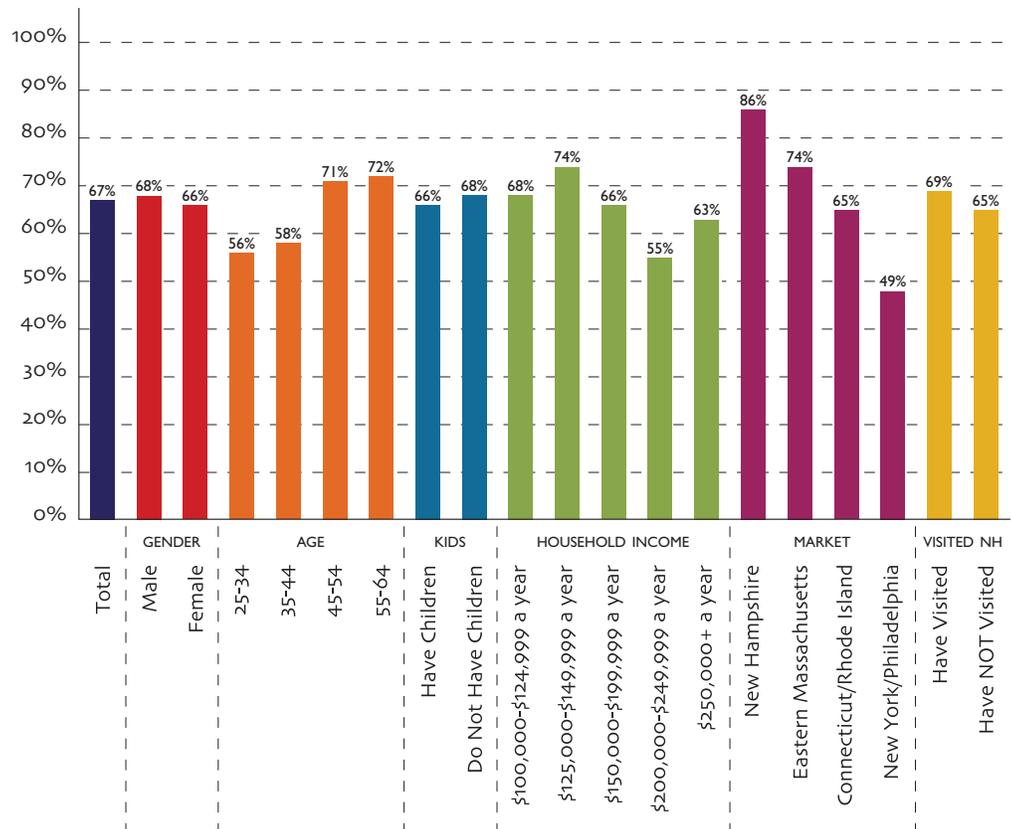
NEW HAMPSHIRE IS ASSOCIATED WITH CANOEING AND KAYAKING

Association scores increase with age, decrease with distance from New Hampshire, and are lower for people who have NOT visited New Hampshire.



NEW HAMPSHIRE IS ASSOCIATED WITH FISHING

Two thirds of the total sample associate or strongly associate New Hampshire with *Fishing*. As with several other statements, association increases with age and decreases with distance from New Hampshire.

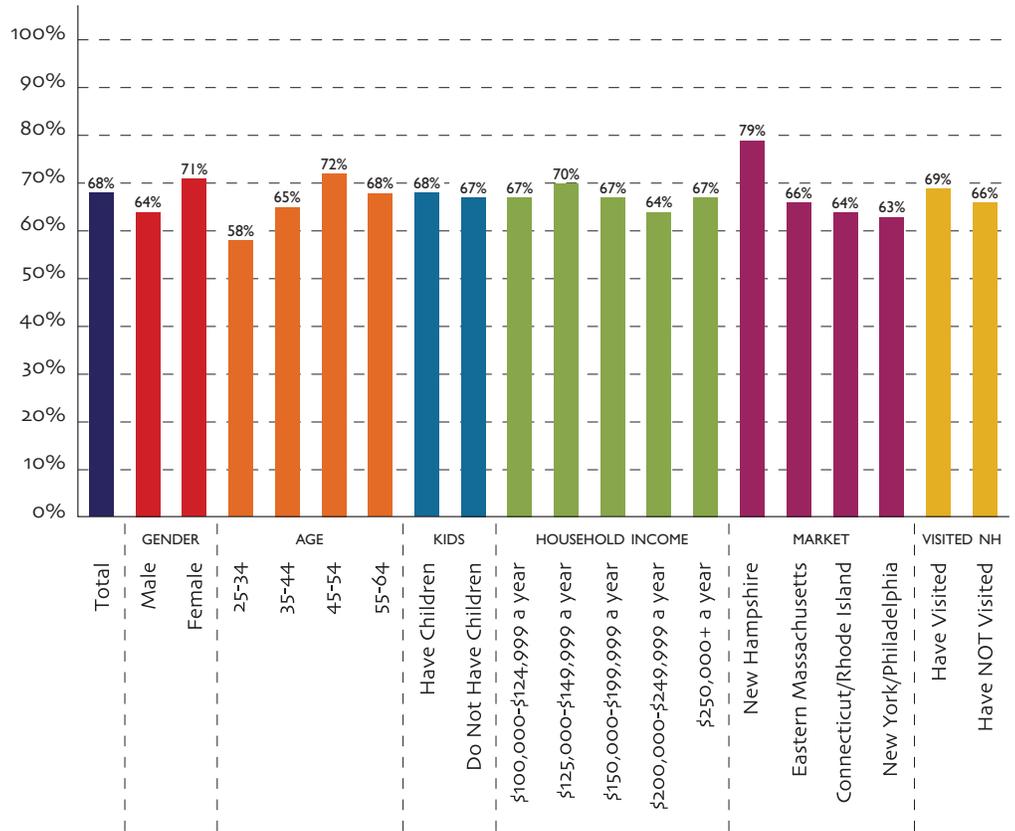


Consumer Quantitative Survey Results

NEW HAMPSHIRE IS ASSOCIATED WITH BIKING

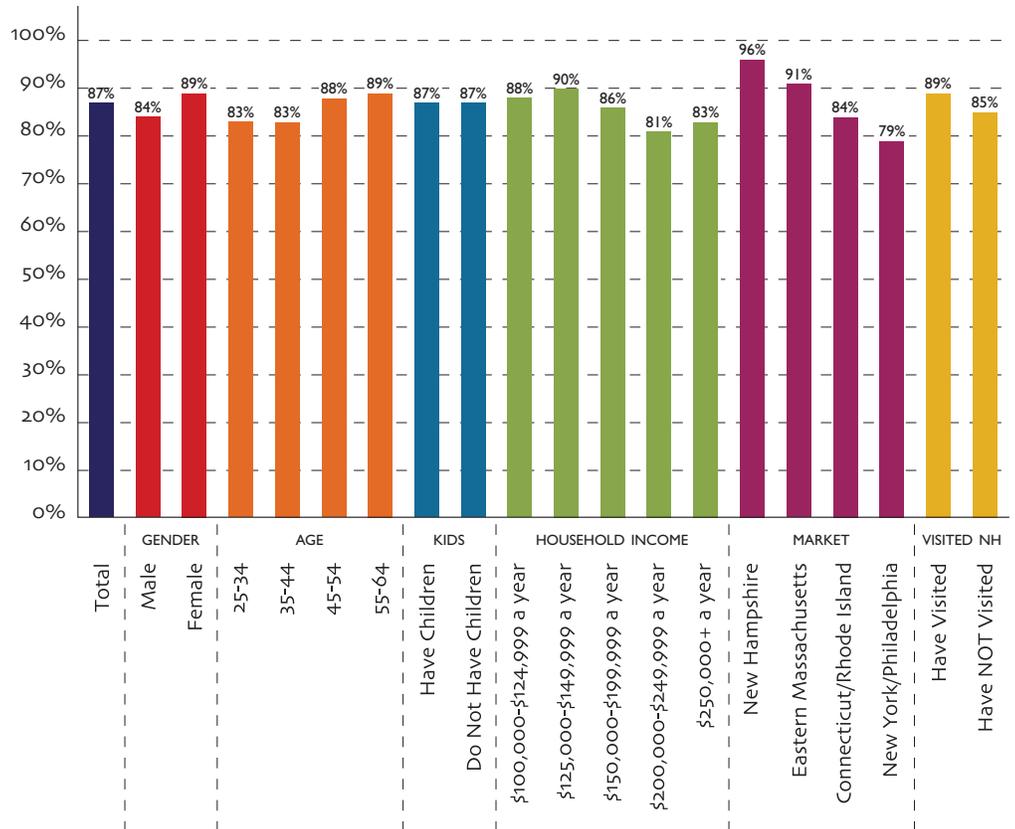
Association scores are lowest among respondents aged 25-34.

Association scores somewhat decrease with distance from New Hampshire.



NEW HAMPSHIRE IS ASSOCIATED WITH HIKING

Association scores increase as respondent age increases and decreases with distance from New Hampshire.

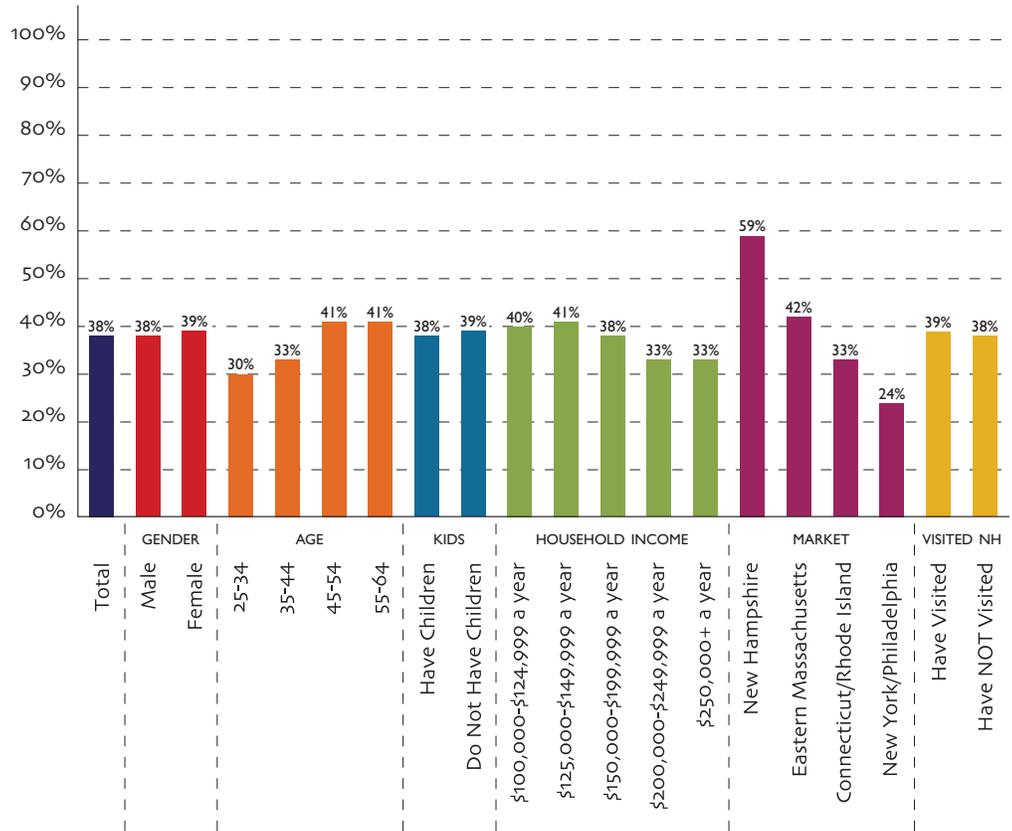


Consumer Quantitative Survey Results

NEW HAMPSHIRE IS ASSOCIATED WITH GOLF

Even among New Hampshire residents included in the consumer quantitative study, less than 60% believe that New Hampshire is associated with *Golf*.

As with other activities, association scores drop with distance from New Hampshire and generally drop as household income increases.



NEW HAMPSHIRE HAS GOOD GOLF COURSES

Less than 40% of the total sample associates New Hampshire with *Golf*, while less than 30% believe *New Hampshire has Good Golf Courses*. As in several other categories, agreement increases with age and decreases with distance from New Hampshire.

