



Idaho Image Research

November 2015



Background

- Idaho is part of the Pacific Northwest, resplendent with natural beauty, national parks, and recreational opportunities.
- As a travel and tourism destination, the state faces the challenge of understanding its market position and competitive strengths and weaknesses to help optimize opportunities.
- Competitively Idaho is surrounded by destinations with strong image positions, notably Washington, Oregon, and Colorado.
- At the same time there is little information regarding what visitors and potential visitors currently know about the area and their image of what it has to offer.
- The goals of this research are to provide insight into the current situation and create benchmarks for image and familiarity. These can serve as the basis of a strategy to help build perceptions of the state as a travel destination.



Research Objectives

- Assess current perceptions of Idaho among past visitors and potential visitors
- Determine the current level of familiarity with what Idaho has to offer, and explore differentiation among a competitive set that includes Oregon, Washington, Montana, Colorado, South Dakota, and Nevada
- Benchmark familiarity with Idaho.
- Explore the current image of the area and perceived strengths and weaknesses
- Compare the image of Idaho to key competitors
- Measure the appeal of the existing product to help highlight the best opportunities to increase interest in the destination
- Forward conclusions and recommendations regarding the current position and the best options for future marketing



Data Collection and Sampling

- Strategic Marketing & Research Insights (SMARInsights) utilizes online surveying for this type of project. It is the best option for gathering information from past and potential visitors. It provides an accurate measure of familiarity and image while providing a larger sample size at a lower cost than other types of data collection.
- With this methodology, an email with the survey link is sent to a qualified list of potential participants and they are asked to complete the survey.
- Respondents were screened to be leisure travelers.
- A total of 1,516 surveys were completed among leisure travelers in the western states of the U.S. An additional 310 were surveyed in western Canada.
- The surveying took place in October 2015. A copy of the questionnaire can be found in the appendix of this report.





Key Insights

- Idaho does not have a clear, defined image among potential travelers. Nevada, Oregon, Washington and Colorado are well defined and represent destinations that are perceived as more sophisticated and with a variety of activities and things to do. Idaho, Wyoming, Utah, Montana and South Dakota are all less defined and share a similar image – scenic beauty and lots of outdoor activities.
- Even in comparison to this group (Wyoming, Utah, Montana & South Dakota), Idaho's image is fairly bland – characterized as ordinary, affordable and safe.
- The challenge for Idaho is that its strengths are shared by nearby states. People do feel that Idaho is beautiful and offers lots of outdoor activities, but other nearby states are viewed as having even stronger product. Therefore Idaho needs to identify a way to differentiate itself from the nearby states.
- States often struggle because they try to appeal to everyone. This is especially challenging with a limited budget. Instead it makes sense to identify a clear target audience and develop the positioning to appeal to that group.
- The research identified 5 segments of visitors based on trip activities and preferences. The Active Family segment (20% of travelers) represents the best target for Idaho. They are already more interested in the state and likely to visit. Outdoor Enthusiasts (22%) represent a good secondary target.



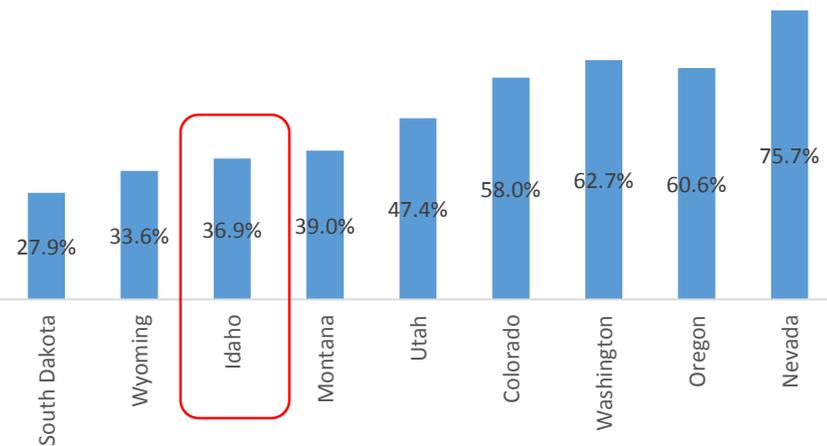
Key Insights

- The best way to position Idaho to appeal to the Active Family audience is to build on the perceptions of the state as safe and affordable and promote the state's wholesome, family appeal. While this can provide a good way to differentiate Idaho from nearby states, it will also be critical to portray Idaho as more fun and exciting than its current image. By positioning Idaho as the family destination, the state builds on current perceptions in a believable way, and creates an image that is different from key competitors.
- The current advertising already focuses on family. Moving more in this direction, while emphasizing fun and family excitement, will solidify this position. Consumers who recall the current advertising are already much more positive about Idaho – reinforcing a family focus' ability to increase interest.
- The family positioning targets the Active Family segment, but it will also work with Outdoor Enthusiasts, who tend to have children.
- From a market perspective, the research indicated that the Canadian audience has much lower familiarity and interest in Idaho. With limited resources it makes more sense to focus on the Western US as the key target markets.

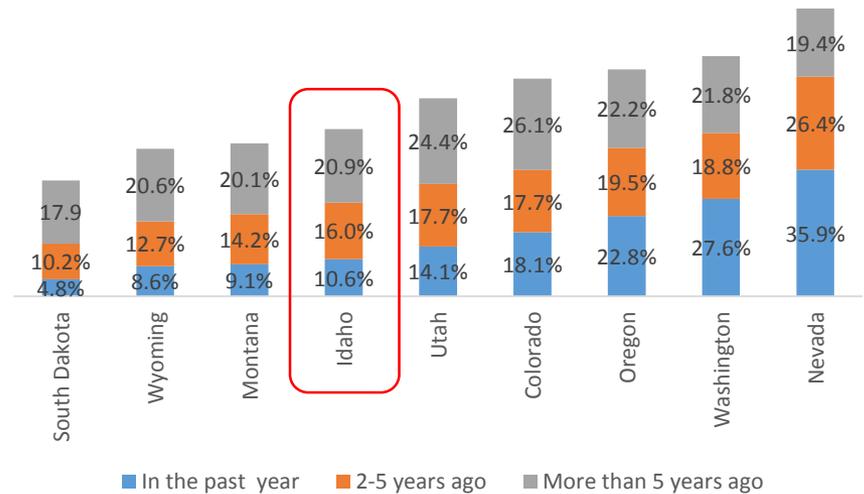
Familiarity with Idaho is fairly low, in part due to low levels of past visitation.

- As might be expected, Nevada (Las Vegas) has the strongest familiarity and past visitation, followed by Washington, Oregon, and Colorado.
- Overall 26% of the audience report having visited Idaho in the past 5 years. About 37% are familiar with what the state had to offer as a leisure travel destination.

Familiarity



Past Visitation

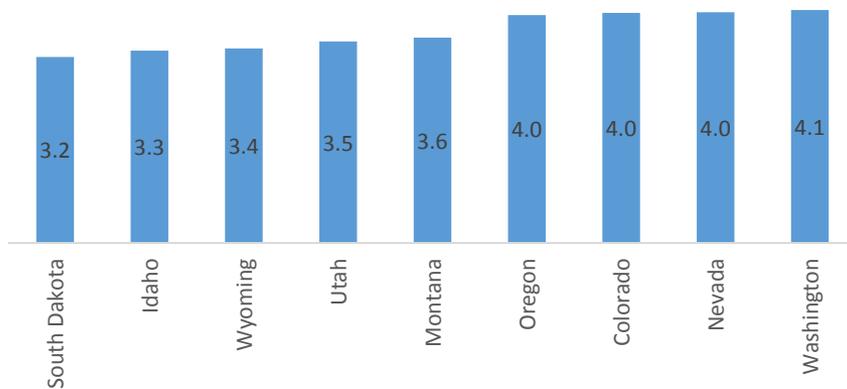


Given lack of familiarity, the image of the state is fairly neutral and future planned visitation is in line with the past.

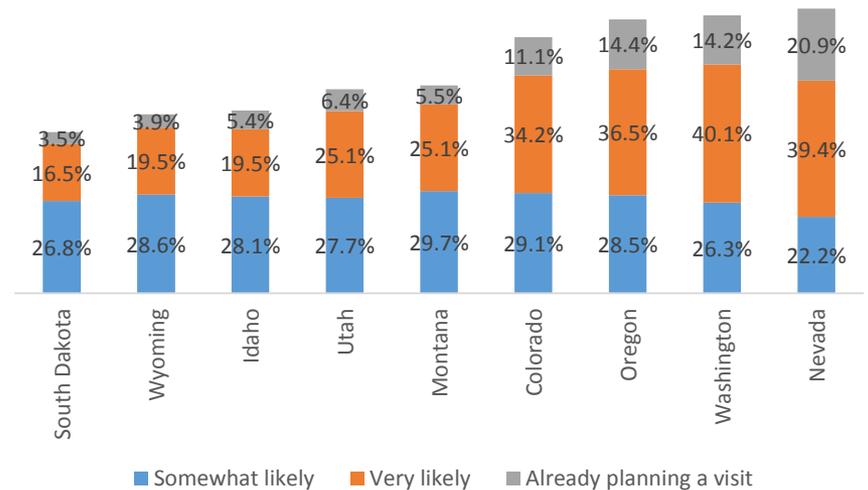
- Four destinations receive strong ratings: Washington, Nevada, Colorado, and Oregon. On a 5-point scale, a rating of three is neutral, and Idaho only receives a 3.3. Again, this seems in part due to familiarity – but indicates that the state does not have a strongly developed image.
- Likelihood to visit in the future is influenced by both the image of the destination and such outside factors as ease of access.

Rating of Destination

on 5-point scale - higher is better



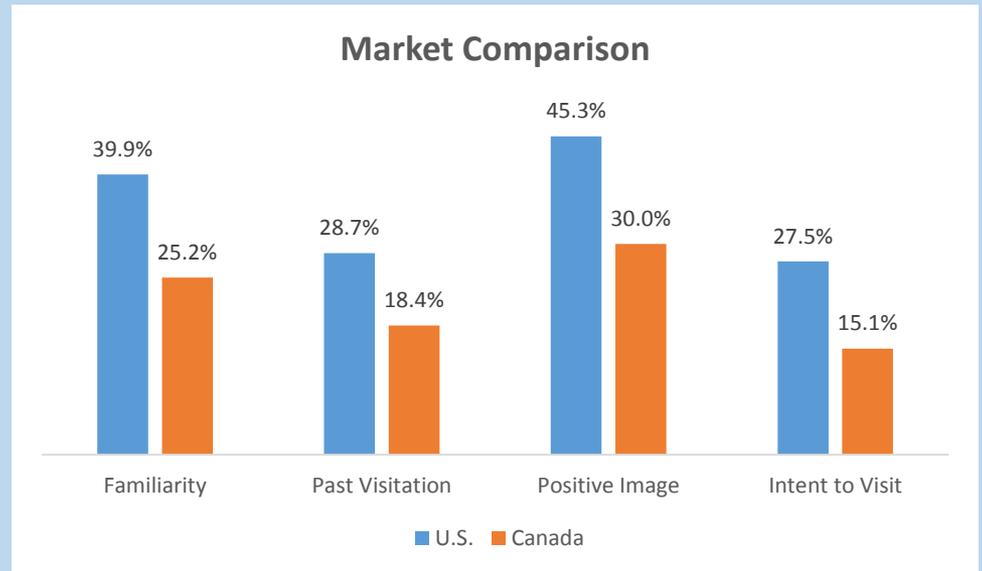
Likelihood to Visit





Canadians are less familiar and interested in Idaho.

- The focus of this study was the western sections of the U.S. and Canada. A comparison of the two markets highlights the relative strength of the U.S. market.
- Canadians are less familiar with Idaho, in part due to less past visitation. They are also less positive about the state and indicate less intent to visit.
- Given the limited budget for the state tourism marketing efforts, it would not be as effective to attempt to reach, educate, and persuade the Canadian markets.





Idaho is not clearly defined in the minds of consumers. While it is seen as *beautiful* and with lots of *outdoor recreation*, this is a general perception of the region and other competitors.

- Ratings of the destination need to be considered both in terms of the strength of the rating and the competitive situation.
- First, in terms of the ratings, the goal is a rating of 4.0 or higher on the 5-point scale. Idaho doesn't achieve this in any of the ratings. Its strongest is a 3.80 for being beautiful. Idaho also gets fairly good ratings for offering lots of outdoor recreation and being safe.

Attribute – ratings of Idaho	Rating
Is beautiful	3.80
Offers lots of outdoor recreation	3.76
Is safe	3.72
Is affordable	3.60
Has great parks	3.58
Has great national parks and monuments	3.48
Is easy to get to	3.47
Is a great place for winter sports such as skiing and snowmobiling	3.44
Is a kid-friendly vacation destination	3.43
Is a great place to vacation when traveling without children	3.39
Offers a good value in a vacation destination compared to other destinations	3.38
Is a great place to participate in extreme sports such as kayaking and rock climbing	3.35
Is a great place to vacation when traveling with children	3.34
Always has something new to discover	3.34
Has interesting historical sites and museums	3.32
Is unique because of the variety of destinations and activities it offers vacationers	3.31
Is a good place to live and work	3.29
Offers an attractive lifestyle	3.28
Is a fun and exciting place	3.25
Offers great vacations for people like me	3.23
Is a place I would be excited to visit for a leisure trip	3.20
Has accessible, diverse and abundant shopping opportunities	3.16
Is a great place to watch professional extreme sports such as kayaking and rock climbing	3.15
Offers lots of amateur sports activities and tournaments	3.15
Is rich in culture and the arts	3.09
Has sunny winters	3.09
I have a “been there, done that” attitude about this state	2.64



Areas of potential differentiation for Idaho are *being safe* and *affordable*.

- Secondly, the competitive situation is represented by the index – this compares Idaho’s rating to the other states evaluated. An index of 100 means Idaho is the same as the other destinations rated, while an index of 95 means the rating is 5% lower and a rating of 105 would be 5% higher.
- Idaho is only viewed stronger than the competition in two areas – safe and affordable. Otherwise the ratings are lower than the competitive set – although generally not much lower. Again this suggests that the image of the state is not well defined.

Attribute – ratings of Idaho	Index to other states
Is beautiful	98
Offers lots of outdoor recreation	99
Is safe	102
Is affordable	104
Has great parks	97
Has great national parks and monuments	94
Is easy to get to	98
Is a great place for winter sports such as skiing and snowmobiling	98
Is a kid-friendly vacation destination	99
Is a great place to vacation when traveling without children	96
Offers a good value in a vacation destination compared to other destinations	97
Is a great place to participate in extreme sports such as kayaking and rock climbing	98
Is a great place to vacation when traveling with children	97
Always has something new to discover	94
Has interesting historical sites and museums	94
Is unique because of the variety of destinations and activities it offers vacationers	94
Is a good place to live and work	98
Offers an attractive lifestyle	96
Is a fun and exciting place	93
Offers great vacations for people like me	94
Is a place I would be excited to visit for a leisure trip	93
Has accessible, diverse and abundant shopping opportunities	94
Is a great place to watch professional extreme sports such as kayaking and rock climbing	95
Offers lots of amateur sports activities and tournaments	95
Is rich in culture and the arts	93
Has sunny winters	97
I have a “been there, done that” attitude about this state	97

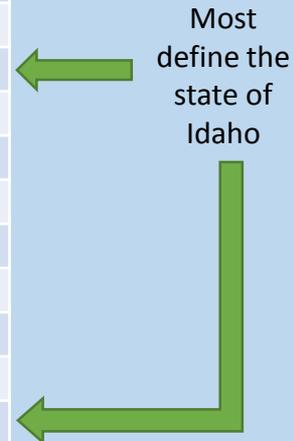
Idaho’s personality is welcoming and relaxing – but competitively it is defined most strongly as “ordinary.”

- In addition to attributes relating to the travel experience, the state was rated in terms of its personality – again using a 5-point scale.
- Idaho receives its strongest ratings for being welcoming, relaxing, and affordable. But these ratings are not strong, and they are generally similar to other states in the region.
- Based on the index measure (comparison to competitors), Idaho is most defined as ordinary and affordable. Consumers do not see the state as upscale, sophisticated, vibrant, exciting, surprising or fun.

Personality Attributes

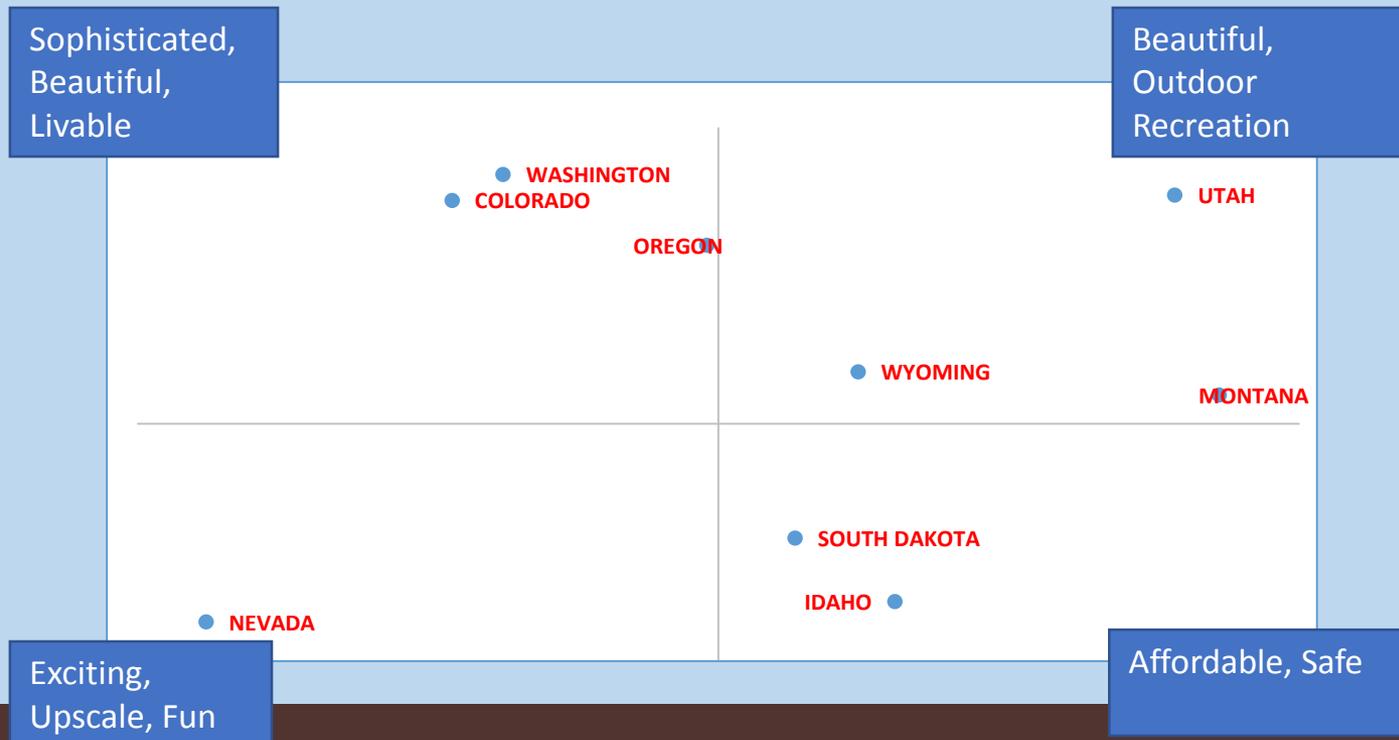
Attribute	Rating	Index
Welcoming	3.70	100
Relaxing	3.68	100
Affordable	3.66	104
Comfortable	3.65	100
Adventurous	3.59	96
Kid-friendly	3.52	100
Fun	3.45	95
Exciting	3.27	93
Surprising	3.27	95
Vibrant	3.24	93
Ordinary	3.20	107
Sophisticated	2.89	92
Upscale	2.84	91

Most define the state of Idaho



A competitive map of the destinations shows which states are most similar and helps explain what links different states.

- **Nevada** is defined by excitement and sophistication – but lacks the culture and attractive lifestyle of other destinations.
- **Washington, Colorado,** and **Oregon** are also viewed as sophisticated, but more cultural, beautiful, and livable.
- **Wyoming, Utah,** and **Montana** are defined by their natural beauty, national parks, and outdoor recreation.
- **Idaho** and **South Dakota** are defined by being affordable, safe, and ordinary.



This map was developed by plotting the ratings of each of the states and identifying their competitive positions based on the totality of their ratings.



Nevada, Washington, Oregon, and Colorado are all viewed as vibrant and sophisticated. Nevada is more exciting/fun, Washington and Oregon have more culture and lifestyle, while Colorado combines sophistication with adventure and outdoor recreation.

Nevada	Washington	Oregon	Colorado
<ul style="list-style-type: none"> •Has sunny winters •Has accessible, diverse and abundant shopping opportunities •Upscale •Sophisticated •Exciting •Surprising •Is easy to get to •Is a fun and exciting place •Is a great place to vacation when traveling without children •I have a “been there, done that” attitude about this state •Fun •Vibrant 	<ul style="list-style-type: none"> •Upscale •Has accessible, diverse and abundant shopping opportunities •Is rich in culture and the arts •Sophisticated •Has interesting historical sites and museums •Offers an attractive lifestyle •Is a place I would be excited to visit for a leisure trip •Always has something new to discover •Exciting •Offers great vacations for people like me •Is beautiful •Vibrant 	<ul style="list-style-type: none"> •Is a good place to live and work •Is a great place to vacation when traveling with children •Offers an attractive lifestyle •Is a place I would be excited to visit for a leisure trip •Offers great vacations for people like me •Has accessible, diverse and abundant shopping opportunities •Is a kid-friendly vacation destination •Is easy to get to •Vibrant •Relaxing •Is beautiful 	<ul style="list-style-type: none"> •Upscale •Is a great place for winter sports such as skiing and snowmobiling •Is a great place to watch professional extreme sports such as kayaking and rock climbing •Vibrant •Is a great place to participate in extreme sports such as kayaking and rock climbing •Adventurous •Sophisticated •Offers lots of outdoor recreation •Offers an attractive lifestyle

Highest indexing attributes for each state, from highest to lowest.



Montana and Wyoming are defined by their beauty, outdoor recreation, and parks. Montana offers more in terms of extreme sports, while Wyoming is more affordable. Utah is characterized by its national parks, and being safe and kid-friendly.

Montana

- Is a great place to participate in extreme sports such as kayaking and rock climbing
- Is a great place to watch professional extreme sports such as kayaking and rock climbing
- Has great parks
- Is a great place for winter sports such as skiing and snowmobiling
- Ordinary
- Is safe
- Offers lots of outdoor recreation
- Is beautiful
- Adventurous

Wyoming

- Ordinary
- Affordable
- Is safe
- Has great national parks and monuments
- Has great parks
- Is a great place for winter sports such as skiing and snowmobiling
- Is beautiful
- Is a kid-friendly vacation destination
- Offers lots of outdoor recreation

Utah

- Has great national parks and monuments
- Is easy to get to
- Is safe
- Kid-friendly

Highest indexing attributes for each state, from highest to lowest.



Idaho joins South Dakota in terms of having little image and generally being viewed as affordable, safe, and ordinary. South Dakota is noted for its interesting historical sites and museums – probably Mount Rushmore.

Idaho

- Ordinary
- Affordable
- Is safe

South Dakota

- Ordinary
- Affordable
- Has interesting historical sites and museums

- These findings certainly suggest that Idaho must identify ways to differentiate itself from the competition and create a stronger image. The findings also suggest that it will be difficult to compete with Nevada, Oregon, Washington, and Colorado. Those states have a different image – more sophisticated and developed.
- For Idaho the real competitive set is the states that are defined more in terms of their natural attributes – Utah, Montana, Wyoming and South Dakota.

Highest indexing attributes for each state, from highest to lowest.



Even when considered just among the more natural states, Idaho is generally average and not viewed as significantly different.

- Idaho’s index ratings compared to the other natural states range from a high of 103 to a low of 94 – so the state is seen as easier to get to than some of the competition and lacking in great national parks and monuments. But generally it is “average” among these states.
- Wyoming and Montana have more defined images and generate more excitement. Utah is defined by its national parks and sunny winters, while South Dakota has a weaker image than Idaho.

Attribute	Idaho	Utah	Wyoming	Montana	South Dakota
Is easy to get to	103	106	99	98	93
Is affordable	103	98	100	101	98
Is a good place to live and work	102	96	101	104	97
Has accessible, diverse and abundant shopping opportunities	102	100	102	97	99
Offers an attractive lifestyle	101	97	102	103	98
Has sunny winters	101	102	100	101	96
Is safe	101	100	102	101	96
Is a kid-friendly vacation destination	100	99	103	101	97
Is a great place to participate in extreme sports such as kayaking and rock climbing	100	97	103	105	96
Is a great place to vacation when traveling without children	100	99	105	100	96
Offers lots of outdoor recreation	100	99	102	103	96
Is a great place to vacation when traveling with children	99	100	101	104	96
Is beautiful	99	100	103	103	94
Is a great place for winter sports such as skiing and snowmobiling	99	97	103	103	97
I have a “been there, done that” attitude about this state	99	98	100	104	99
Offers a good value in a vacation destination compared to other destinations	99	99	101	102	99
Always has something new to discover	99	101	102	103	95
Offers great vacations for people like me	99	100	103	101	97
Offers lots of amateur sports activities and tournaments	99	101	101	100	99
Is unique because of the variety of destinations and activities it offers vacationers	98	100	102	102	98
Is rich in culture and the arts	98	102	101	100	99
Is a fun and exciting place	98	100	104	101	97
Is a great place to watch professional extreme sports such as kayaking and rock climbing	97	99	102	104	98
Is a place I would be excited to visit for a leisure trip	97	99	104	105	95
Has interesting historical sites and museums	97	102	101	99	101
Has great parks	97	100	104	102	97
Has great national parks and monuments	94	103	104	101	98



In terms of personality, Idaho indexes highest for being ordinary, affordable and comfortable.

- The ratings of these states are fairly similar. Idaho is more ordinary than the competition.
- Wyoming is more adventurous, fun, and surprising, while Montana is more sophisticated, surprising, vibrant, and adventurous.
- These findings reinforce that there is not a great deal of familiarity or depth of knowledge regarding these states and there is little differentiation.
- Given these findings it is useful to consider how familiarity and visitation impact the image of the state.

Personality Attributes

Attribute	Idaho	Utah	Wyoming	Montana	South Dakota
Ordinary	104	93	100	102	101
Affordable	102	97	101	100	100
Comfortable	102	99	101	100	98
Relaxing	101	97	101	102	98
Kid-friendly	101	99	100	102	98
Welcoming	100	98	102	100	99
Upscale	100	99	100	102	100
Sophisticated	100	98	99	103	100
Surprising	99	97	103	103	99
Fun	99	99	103	101	98
Vibrant	99	101	101	103	97
Adventurous	98	97	104	104	96
Exciting	98	98	103	103	98



Among the similar states, Idaho is affordable, safe, and a good place for kids.

- Wyoming and Montana are defined by the more extreme sports and more activity, while Utah is defined by the national parks. South Dakota has a weak image and is pushed to the top of the map because it is viewed as the least “easy to get to”





Familiarity and recent visitation both have a positive impact on ratings of Idaho, although recent visitors are actually a bit less positive than those who are familiar.

- It is noteworthy that those with familiarity are more positive than recent visitors in many areas. This suggests that the experience may not be quite as positive as consumers expect. The differences are not great – but they do highlight the need to not oversell the destination.
- Among those with familiarity and recent visitors the highest ratings are for beauty, outdoor recreation, great parks and being kid-friendly – as well as being safe and affordable.

Attributes	Not very familiar	Familiar	Recent Visitors
Is beautiful	3.55	4.24	4.15
Is safe	3.48	4.11	4.13
Offers lots of outdoor recreation	3.49	4.21	4.12
Is easy to get to	3.12	4.08	4.07
Is affordable	3.36	4.02	4.01
Has great parks	3.32	4.02	3.95
Is a kid-friendly vacation destination	3.18	3.84	3.84
Offers a good value in a vacation destination compared to other destinations	3.11	3.84	3.82
Is a great place to vacation when traveling without children	3.10	3.88	3.82
Is a great place to vacation when traveling with children	3.07	3.82	3.80
Offers great vacations for people like me	2.89	3.82	3.77
Has great national parks and monuments	3.25	3.88	3.77
Is a great place for winter sports such as skiing and snowmobiling	3.21	3.84	3.76
Always has something new to discover	3.08	3.80	3.75
Is unique because of the variety of destinations and activities it offers vacationers	3.03	3.79	3.73
Is a good place to live and work	3.02	3.74	3.72
Is a place I would be excited to visit for a leisure trip	2.84	3.81	3.72
Is a fun and exciting place	2.92	3.80	3.70
Offers an attractive lifestyle	3.00	3.77	3.70
Has interesting historical sites and museums	3.07	3.77	3.70
Is a great place to participate in extreme sports such as kayaking and rock climbing	3.13	3.73	3.67
Has accessible, diverse and abundant shopping opportunities	2.93	3.57	3.47
Offers lots of amateur sports activities and tournaments	2.91	3.54	3.46
Is rich in culture and the arts	2.87	3.48	3.44
Is a great place to watch professional extreme sports such as kayaking and rock climbing	2.96	3.48	3.44
Has sunny winters	2.86	3.46	3.35
I have a "been there, done that" attitude about this state	2.40	3.04	3.07



Recall of Idaho’s advertising or website also have a positive impact on the image of the destination.

- About 20% of the respondents indicated that they recalled the Idaho print ads or the website. Those with recall are significantly more positive about the state – and their responses are positive across all of the attributes.
- Advertising does help to create interest in Idaho, which probably leads to exploration and information gathering. While the advertising itself probably doesn’t directly impact all of the attributes, as consumers find out more about the state they are significantly more positive.

Attributes	No ad recall	Recall Ads	Difference
Is beautiful	3.71	4.15	0.44
Is safe	3.63	4.05	0.42
Offers lots of outdoor recreation	3.68	4.03	0.35
Has great parks	3.46	4.01	0.55
Is affordable	3.51	3.97	0.46
Is easy to get to	3.35	3.94	0.59
Is a kid-friendly vacation destination	3.3	3.89	0.59
Has great national parks and monuments	3.37	3.89	0.52
Is a fun and exciting place	3.08	3.88	0.8
Is a great place to vacation when traveling without children	3.25	3.88	0.63
Is unique because of the variety of destinations and activities it offers vacationers	3.16	3.87	0.71
Has interesting historical sites and museums	3.18	3.87	0.69
Always has something new to discover	3.20	3.86	0.66
Is a great place to vacation when traveling with children	3.21	3.86	0.65
Is a place I would be excited to visit for a leisure trip	3.03	3.84	0.81
Offers great vacations for people like me	3.07	3.84	0.77
Offers a good value in a vacation destination compared to other destinations	3.26	3.83	0.57
Offers an attractive lifestyle	3.15	3.78	0.63
Is a good place to live and work	3.16	3.76	0.60
Has accessible, diverse and abundant shopping opportunities	3.01	3.73	0.72
Is a great place to participate in extreme sports such as kayaking and rock climbing	3.25	3.73	0.48
Offers lots of amateur sports activities and tournaments	2.99	3.71	0.72
Is rich in culture and the arts	2.93	3.7	0.77
Is a great place for winter sports such as skiing and snowmobiling	3.38	3.7	0.32
Is a great place to watch professional extreme sports such as kayaking and rock climbing	3.01	3.66	0.65
Has sunny winters	2.96	3.55	0.59
I have a “been there, done that” attitude about this state	2.45	3.32	0.87



Initial analysis suggests that to increase interest Idaho needs to be viewed as more exciting, fun, and unique.

- The attributes that can have the most impact in creating stronger interest can be identified statistically (using correlation analysis).
- Consumers want to be excited about where they are visiting and feel that it fits their needs. For Idaho specifically they want a fun exciting place that is unique, offers an attractive lifestyle, and is a good value. They want a place that is exciting, fun, vibrant, and surprising.
- The correlation with being viewed as a place to travel without children is likely a function of the childless households outnumbering those with kids among the general traveling population.

Attributes to Promote

- Is a place I would be excited to visit for a leisure trip
- Offers great vacations for people like me
- Is a fun and exciting place
- Is unique because of the variety of destinations and activities it offers vacationers
- Offers an attractive lifestyle
- Is a great place to vacation when traveling without children
- Offers a good value in a vacation destination compared to other destinations
- Always has something new to discover

- Exciting
- Fun
- Vibrant
- Surprising



Segments

Given that Idaho does not have a strongly defined position, there is opportunity to select how to position and differentiate the state.

- These initial findings indicate that familiarity with Idaho is fairly low –and that even among those who are familiar, there is no strongly defined image.
- Idaho is grouped together with several other western states – Utah, Wyoming, Montana, and South Dakota. All are viewed as beautiful, scenic, and offering outdoor activities.
- Montana and Wyoming are more strongly defined for their outdoor attributes, as well as for being a bit more adventurous than the other states. Utah is defined by its national parks. South Dakota is the least defined, and the key image seems to be Mount Rushmore.
- There is opportunity for Idaho to create a stronger, more appealing image. Considered generally, this would involve being viewed as more exciting, vibrant, fun, and surprising.
- At the same time, that would put Idaho more directly in competition with Washington, Oregon, and Colorado. Currently those states “own” being more exciting and appealing.
- The attributes identified as being most important in terms of increasing interest also highlight the challenge of targeting. A key attribute is “being a good place to travel without children.” But if Idaho is targeting families, this finding would certainly be different. Therefore it may make sense to better define the target audience and consider what motivates the potential target audience.
- Our experience has found that the best way to identify targets for traveling is to consider what they want to do on vacation.



5 activity-based segments

- The segments were created based on their typical activities on vacation, as well as some demographic data. Profiles of each are presented in the following pages.

Urban Sophisticates

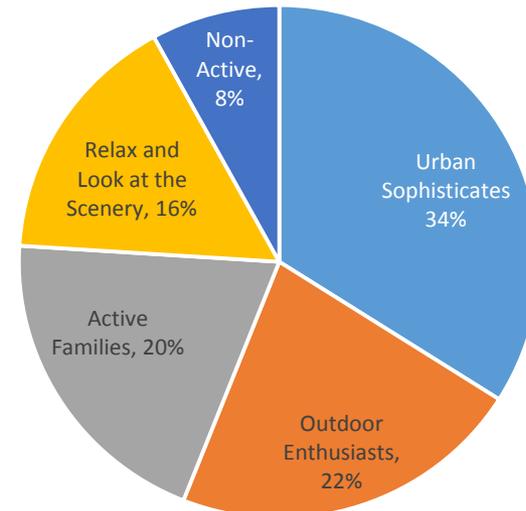
Outdoor Enthusiasts

Active Families

Relax and Look at the Scenery

Non-active

Segment Distribution



Outdoor Enthusiasts

Demographics

Male
62% married
54% with children
\$74,000 income



Trip Activities

Hunting
Fishing/boating
Trail rides
Hiking/backpacking

Accommodations

Camping
RVing
Guest ranch



Non-Active

Demographics

Women
Lowest income
Lowest education
Older with no children

Trip Activities

Shopping
Scenic drives



Accommodations

Budget properties

Urban Sophisticates

Demographics

Better educated
Younger
Fewer married

Accommodations

AirBnb



Trip Activities

Food scene
Cities & urban areas
Luxury experience
Culinary tours
Evening entertainment



Relax and Look at the Scenery

Demographics

Oldest
Female
Low education
Single/no kids

Trip Activities

Scenic drives
Historic sites
Museums
State parks
Natural attractions

Accommodations

Mid-level hotel



Active Families

Demographics

Youngest
Married with kids
Best education
Highest income



Trip Activities

Skiing
Biking
Backpacking
Luxury

Accommodations

High-end hotels
Luxury resorts

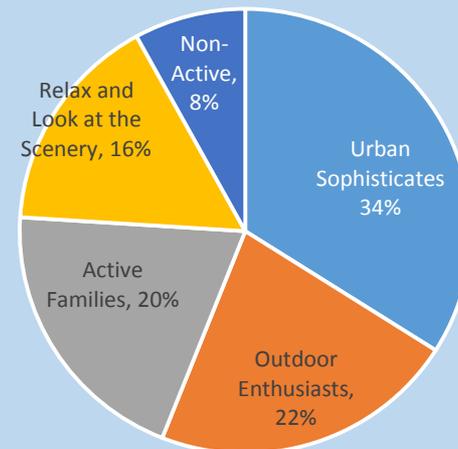


Two segments seem to offer stronger potential for Idaho – Outdoor Enthusiasts and Active Families.

- One way to evaluate the segments is based on past visitation to Idaho, as well as their interest in a future trip.
- Among the five segments, the Active Families have the highest percentage of recent visitors (within past 5 years), followed by Outdoor Enthusiasts. These two segments also have the highest percentage of people who indicate that they are likely to visit Idaho for a future leisure trip.
- Given that these two segments represent 42% of the population, they represent a reasonable target for Idaho. In fact, they may be too large a target and it may make sense to choose one or the other.

Segment	% recent visitors	% likely to visit
Urban Sophisticates	21.5%	18.6%
Outdoor Enthusiasts	33.0%	33.6%
Active Families	40.3%	43.6%
Relax and Look at the Scenery	18.8%	13.8%
Non-Active	12.5%	4.7%

Segment Distribution





Both segments have children and there are many similarities in what would motivate them to visit Idaho.

- Both groups want more fun and excitement, but they also value the attractive lifestyle and value that Idaho offers.

Attributes most Correlated with Likely Visitation by Key Segment

(Shown in order of highest to lowest correlation)

	Active Families	Outdoor Enthusiasts
Image attributes	Is a fun and exciting place	Is a fun and exciting place
	Offers lots of amateur sports activities and tournaments	Offers an attractive lifestyle
	Is unique because of the variety of destinations and activities it offers vacationers	Offers a good value in a vacation destination compared to other destinations
	Offers an attractive lifestyle	Is a good place to live and work
	Offers a good value in a vacation destination compared to other destinations	Is a great place to vacation when traveling with children
	Is a good place to live and work	Always has something new to discover
	Is a great place to vacation when traveling with children	
Personality attributes	Fun	Fun
	Exciting	Exciting
	Adventurous	Vibrant
	Surprising	Adventurous

Attributes common to both segments are shown in bold and should be promoted.

Active Families is the best target, but the positioning for this segment also works for Outdoor Enthusiasts.

- Active families are more likely to have visited Idaho recently and intend to visit in the future – and therefore they represent the best target.
- But the findings suggest that the positioning for the state that will appeal to Active Families will also appeal to Outdoor Enthusiasts.
- Idaho should “own” its position as safe, affordable, and kid-friendly. It should build on its image as a wholesome family destination that is not only a good place to visit, but a place with an attractive lifestyle. At the same time, it is critical to improve the image of the state as a place that is fun, vibrant, and a bit surprising.

Segment	% recent visitors	% likely to visit
Urban Sophisticates	21.5%	18.6%
Outdoor Enthusiasts	33.0%	33.6%
Active Families	40.3%	43.6%
Relax and Look at the Scenery	18.8%	13.8%
Non-Active	12.5%	4.7%





Active Families are strong participants in many activities, but focusing on what they would include for an Idaho trip can enhance the relevance of the message.

- Consumers were asked which activities they were likely to include on a trip to Idaho. Looking at both likely levels of participation and the index to other segments, it is clear that Active Families would include a wide variety of activities on their trips.
- Many are fairly broad, such as scenic drives and state parks, but they also like natural attractions, historical sites, festivals, and family attractions.

Activity	Active Families % would include	Index to other Segments
Scenic drives	58%	107
Shopping	56%	124
State parks	54%	102
Exploring natural attractions (geological formations, waterfalls, forests, etc.)	52%	106
Visiting a historical site or museum	51%	113
Fairs/festivals	48%	114
Family attractions	47%	127
Hiking/backpacking	46%	139
Wildlife watching	45%	129
Theme park/water park	41%	137
Camping/RVing	41%	128
Culinary tours/wineries	37%	154
Fishing	36%	157
Horseback riding	36%	150
Cultural events	36%	129
Spa/resort	35%	152
Guided adventure excursions	33%	183
Kayaking, canoeing or other boating	32%	168
Backcountry adventure	31%	141
Biking/mountain biking	30%	188
Whitewater rafting	28%	175
Farm tours or visits	28%	127
Skiing or snowboarding	27%	208
ATV/off-roading	24%	185
Watching extreme sports (rock climbing, whitewater kayaking, etc.)	19%	238
Participating in extreme sports (rock climbing, whitewater kayaking, etc.)	19%	238
Hunting	18%	200
Golfing	17%	189
Motorcycle riding	14%	233



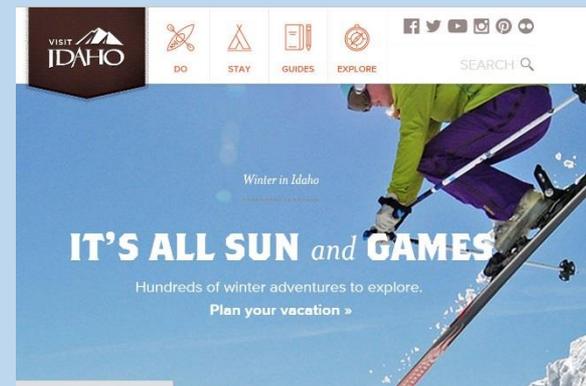


Reaching Consumers

Consumers turn to online travel sources for information, including destination websites.

- The survey explored the sources of information that consumers use in trip planning, as well as which ones they find most useful.
- The table shows the percentage of people who used each source in recent trip planning, and the percentage that found that source useful. The net score combines the level of usage with usefulness to identify the most important sources.
- Not surprisingly online travel sites lead, but interestingly destination websites come in next. Family or friends are used by many people, but are not viewed as useful as online sources.
- Social media, travel guides, other print, and calling 800 numbers are much less prevalent.

Used recently	Used	Found useful	Net
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	58%	66%	38%
Destination website	56%	54%	30%
Family or friends	60%	50%	30%
Online traveler reviews	49%	41%	20%
Social media (Facebook, Twitter, Instagram, etc.)	33%	24%	8%
Printed travel guides	26%	24%	6%
Guide books like Frommer's or Lonely Planet	17%	34%	6%
Magazine and newspaper articles	23%	17%	4%
Called destination on 800 number	12%	15%	2%





The type and prevalence of different options vary by segment, so Idaho should focus on preferences among key segments.

- As might be expected, there are differences by segment – both in terms of which sources they use and which they find most useful.
- This example focuses on the two segments identified as having higher potential for Idaho. Active Families use their friends and family for planning, but don't find them very useful – so this source is less important to them. Outdoor Enthusiasts are less likely to turn to family and friends, but more likely to use their advice.
- For both groups online travel advice sites are key, and destination websites are also important.

Active Family Segment	Used	Useful	Net
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	68%	71%	48%
Destination website	66%	56%	37%
Family or friends	70%	43%	30%
Online traveler reviews	63%	41%	26%
Social media	54%	18%	10%
Guide books like Frommer's or Lonely Planet	27%	27%	7%
Magazine and newspaper articles	45%	15%	7%
Printed travel guides	39%	14%	6%
Called destination on 800 number	20%	8%	2%

Outdoor Enthusiast Segment	Used	Useful	Net
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	53%	62%	33%
Family or friends	57%	57%	33%
Destination website	54%	59%	32%
Online traveler reviews	43%	37%	16%
Social media	37%	33%	12%
Printed travel guides	25%	31%	8%
Guide books like Frommer's or Lonely Planet	13%	29%	4%
Magazine and newspaper articles	21%	17%	4%
Called destination on 800 number	15%	16%	2%

When planning a trip to Idaho, consumers indicated relying more heavily on Trip Advisor and an app.

- In terms of researching and booking travel, online booking sites are most prevalent and used by almost two-thirds of the audience.
- The second tier of resources includes Trip Advisor, contacting the company directly, and contacting the CVB/destination.
- In addition to asking consumers how they typically research and book travel, the survey asked specifically what sources they would use if planning a trip to Idaho.
- In most cases the results are similar, but when planning a trip to Idaho consumers would be much more likely to turn to Trip Advisor and a smart phone app.

Research and Book Travel	% Use	% Would Use for Idaho Trip
Online booking sites (kayak, hotels.com, etc.)	64%	62%
Trip Advisor website/app	40%	51%
Company directly (call/visit website for hotel, airline, etc.)	42%	40%
Destination (call/visit website for state tourism or CVB office)	39%	39%
Smart phone app	17%	23%
Travel agent	15%	16%





There is strong interest in a Visitors Guide for those planning a trip to Idaho.

- When planning a trip a trip to Idaho, there is interest in a variety of different types of information. Most indicate interest in a Visitors Guide, followed by a Yellowstone Map/Guide and a highway map.
- Interest does vary by segment – with the Active Families wanting everything. Outdoor Enthusiasts are more interested in the RV and Campground guide and the Children’s brochure, while the Relax and Enjoy the Scenery group focused more on maps.

Type of Information	% Want	Outdoor Enthusiasts	Non-Active	Urban	Scenery	Active Families
Visitor guide	77%	97	86	103	106	101
National Geographic Yellowstone Map Guide	54%	100	70	98	107	115
State highway map	45%	91	82	93	127	102
Directory of Idaho guided outdoor adventures	43%	95	65	100	77	133
RV park and campground guide	30%	130	67	87	63	127
Children’s brochure	27%	130	81	78	70	141
Monthly newsletter	13%	100	38	77	62	192
Do not use/no interest in guides	7%	57	286	114	100	43

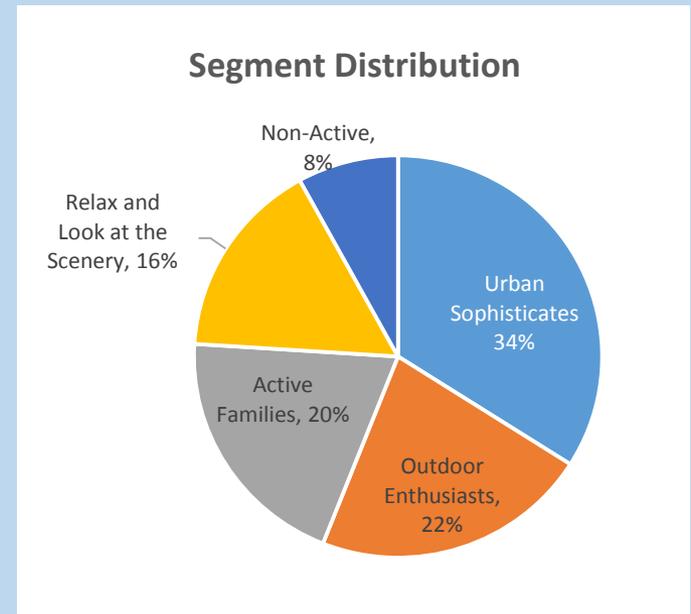


Appendix

Detailed Segments

Detailed Segments

- The segments were created based on their typical activities on vacation, as well as some demographic data.
- **Urban Sophisticates** – They are interested in nightlife, entertainment, culinary, and culture. They have above average income and education, and are less likely to have children at home.
- **Outdoor Enthusiasts** – This group loves the outdoors whether it's hiking, fishing, hunting or more extreme options. This group is more likely to be male, has average income and education and they are more likely to have children at home
- **Active Families** – This group participates in all kinds of activities – they travel a lot and there is nothing they will not try. This group is the youngest and most likely to have children at home. They also have the highest levels of income and education.
- **Relax and Look at the Scenery** – This group is older, and more likely to be female and without children. They like to look at the scenery, attend a festival or explore a historic site. They don't try to do too much or move too quickly.
- **Non-active** – This small group was not strongly interested in any of the activities. They have the lowest income and educational levels and may not be able to travel much except to visit friends and relatives.





Appendix

Questionnaire

Questionnaire

Idaho Tourism (Drake Cooper)
2015 Image & Brand Perception Study
September 25, 2015 Draft
Goal field date: week of October 5

ZIP. What is your ZIP code? _____

S1. 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

S2. Do you normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home?

1. Yes
0. No -> TERMINATE

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

1. Thinking about when you travel, how often do you or someone you are traveling with participate in each of the following activities on your leisure trips?

[ROTATE]	Never	Rarely	Some-times	Often
Outdoor recreation such as hiking, camping or biking				
Visiting cities and urban areas				
Cultural activities such as museums and the performing arts				
Golf				
Visiting a spa				
Shopping at a mall				
Evening entertainment and nightlife				
Watching sporting events				
Experiencing the unique culture of the area				
Visiting a place to enjoy the great food scene				
Exploring small towns				
Shopping in a downtown or neighborhood district (not a mall)				
Visiting microbreweries and the local craft beer scene				
Taking scenic drives				
Boating or other water-based activities				
Participating in activities that are fun for young children				
Skiing, snowboarding, and/or other snow sports				
Enjoying downtown vitality				
Seeing interesting architecture				
Sightseeing or taking tours				
Visiting historic sites				
Attending special events and festivals				
Visiting well-known attractions				

1

Fishing				
Listening to live music				
Visiting art galleries or art districts				
High-end shopping				
Luxury experiences				
Hunting				
Visiting parks (state or national)				
Backcountry excursions such as backpacking and trail rides				

2. 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	
Airbnb	
Camping/RVing	
Guest Ranch	
Other vacation home rental	

3. In the course of planning a recent leisure trip, have you gathered information in any of the following ways? *Select all that apply.* [ROTATE]

Destination website	
Family or friends	
Online travel advice websites (TripAdvisor.com, AAA.com, etc.)	
Guide books like Frommer's or Lonely Planet	
Magazine and newspaper articles	
Social media (Facebook, Twitter, Instagram, etc.)	
Online traveler reviews	
Printed travel guides	
Called destination on 800 number	
Other, please specify _____	
Have not gathered any leisure travel information	

4. [SHOW RESOURCES CHOSEN IN Q3] What were the most helpful sources of information? You may choose up to two.

5. Next, please think about the way you typically research and book travel. What types of resources do you use? *Select all that apply.* [ROTATE]

Destination (call/visit website for state tourism or CVB office)	
Company directly (call/visit website for hotel, airline, etc.)	
Online booking sites (kayak, hotels.com, etc.)	
Travel agent	
Trip Advisor website/app	
Smart phone app	
Other resource, please specify _____	

2

Questionnaire

Now we want to explore your attitudes toward several specific destinations.

6. 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
Idaho				
Washington				
Oregon				
Nevada				
Utah				
Wyoming				
Montana				
Colorado				
South Dakota				

7. 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
Idaho				
Washington				
Oregon				
Nevada				
Utah				
Wyoming				
Montana				
Colorado				
South Dakota				

8. 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
Idaho					
Washington					
Oregon					
Nevada					
Utah					
Wyoming					
Montana					
Colorado					
South Dakota					

3

9. 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
Idaho					
Washington					
Oregon					
Nevada					
Utah					
Wyoming					
Montana					
Colorado					
South Dakota					

Now we would like you to provide more detailed ratings of a couple of the destinations we've been considering.

[HAVE THEM RATE IDAHO AND ONE OTHER RANDOMLY CHOSEN DESTINATION WITH FAMILIARITY EQUAL/SIMILAR TO IDAHO.]

Please indicate how much you agree with each of the 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					
Offers a good value in a vacation destination compared to other destinations					
Has sunny winters					
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					
Offers lots of amateur sports activities & tournaments					
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					

4



Questionnaire

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					
Has accessible, diverse and abundant shopping opportunities					
Is a great place to vacation when traveling with children					
Is a great place to vacation when traveling without children					
I have a "been there, done that" attitude about this state					
Offers great vacations for people like me					
Is affordable					
Has great national parks and monuments					
Is a great place to participate in extreme sports such as kayaking and rock climbing					
Is a great place to watch professional extreme sports such as kayaking and rock climbing					

10. Again thinking about [INSERT STATE], please consider the following words that could be used to describe the "personality" of an area and indicate how much you agree that each one describes [INSERT STATE].

[ROTATE]	Strongly disagree - 1	2	3	4	Strongly agree - 5
Upscale					
Surprising					
Vibrant					
Comfortable					
Adventurous					
Affordable					
Fun					
Sophisticated					
Exciting					
Relaxing					
Kid-friendly					
Welcoming					
Ordinary					

11. [ASK ONLY THOSE SOMEWHAT FAMILIAR OR GREATER IN Q6]
How would you describe Idaho to someone who had never been there?

12. If you were to visit Idaho, which of the following places or activities would you include on your trip? Select all that apply.

[ROTATE]		
Whitewater rafting		
Kayaking, canoeing or other boating		
Horseback riding		
Fishing		
Scenic drives		
Skiing or snowboarding		
Golfing		
Exploring natural attractions (geological formations, waterfalls, forests, etc.)		
Hiking/backpacking		
Biking/mountain biking		
Guided adventure excursions		
Visiting a historical site or museum		
Wildlife watching		
Farm tours or visits		
State parks		
Fairs/festivals		
Cultural events		
Shopping		
Family attractions		
Hunting		
Camping/RVing		
Watching extreme sports (rock climbing, whitewater kayaking, etc.)		
Participating in extreme sports (rock climbing, whitewater kayaking, etc.)		
Spa/resort		
Culinary tours/wineries		
Theme park/water park		
ATV/off-roading		
Motorcycle riding		
Backcountry adventure		
Other, please specify _____		
None of the above		

Questionnaire

Now we would like you to view some different forms of advertising. Please review each ad carefully and answer the questions that follow.

I:\Ads - Master\Idaho\2015 Image and Branding



[SHOW ALL ON ONE SCREEN]

13. Have you seen any ads like these before now?
 Yes
 No

I:\Ads - Master\Idaho\2015 Image and Branding
 idaho website



14. Have you visited this Idaho website www.visitidaho.org?
 Yes
 No

15. If you were preparing to travel to Idaho, what information would you be interested in receiving?
Select all that apply.

Visitor guide	
Children's brochure	
RV park & campground guide	
Directory of Idaho guided outdoor adventures	
National Geographic Yellowstone Map Guide	
Monthly newsletter	
State highway map	
Other, please specify _____	
Do not use/no interest in guides	

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16. If you were preparing to travel to Idaho, what types of resources would you use to book travel?
Select all that apply. [ROTATE]

Destination (call/visit website for state tourism or CVB office)	
Company directly (call/visit website for hotel, airline, etc.)	
Online booking sites (kayak, hotels.com, etc.)	
Travel agent	
Trip Advisor website/app	
Smart phone app	
Other resource, please specify _____	

DEMOS [ALL ON ONE SCREEN & DO NOT FORCE]

The following questions are for classification purposes 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

8



Questionnaire

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