



LOS ALAMOS COUNTY, NM Research Report

April 1, 2014

TABLE OF CONTENTS

INTRODUCTION	4
<i>About North Star Destination Strategies</i>	4
<i>About the BrandPrint Process</i>	4
EXECUTIVE SUMMARY	5
BRANDING PARTNERS	5
UNDERSTANDING	5
STRATEGIC BRAND PLATFORM	6
UNDERSTANDING	7
WHERE THE BRAND HAS BEEN & WHY	7
IN-MARKET STUDY	8
<i>Purpose, Methodology & Results</i>	8
ONLINE COMMUNITY-WIDE SURVEY	11
<i>Purpose, Methodology & Results</i>	11
COMMUNITY BRAND BAROMETER	20
<i>Purpose, Methodology & Results</i>	20
COMMUNITY TAPESTRY STUDY	24
<i>An Introduction to Community Tapestry</i>	24
<i>Purpose, Methodology & Results</i>	25
<i>Community Tapestry Segment Breakdown by LifeMode Group</i>	26
<i>Community Tapestry Who Report LifeMode Groups</i>	27
<i>Community Tapestry Who Report Community Tapestry Segments</i>	31
<i>Community Tapestry Who Report Top Tapestry Segments</i>	35
<i>Community Tapestry What Report Understanding the Who Report</i>	36
<i>Community Tapestry What Report Reading the What Report Charts</i>	37
<i>Community Tapestry What Report Resident What Report</i>	38
<i>Community Tapestry What Report Regional Profile What Report</i>	40
OUTSIDE PERCEPTION STUDY	42
<i>Purpose, Methodology & Results</i>	42
CONSUMER AWARENESS & PERCEPTION STUDY	57
<i>Purpose, Methodology & Results</i>	57
STAKEHOLDER PERCEPTION STUDY	74
<i>Purpose, Methodology & Results</i>	74
COMPETITIVE ANALYSIS	77
<i>Purpose, Methodology & Results</i>	77
INSIGHTS	91
WHERE THE BRAND SHOULD BE	91
INSIGHTS ABOUT LOS ALAMOS	92
LOS ALAMOS BRAND PLATFORM & RATIONALE	96

EVALUATION	98
TAPESTRY PROFILING STUDY	99
<i>Purpose, Methodology & Results</i>	99
BRAND BAROMETER STUDY	100
<i>Purpose, Methodology & Results</i>	100
ONLINE COMMUNITY-WIDE SURVEY	101
<i>Purpose, Methodology & Results</i>	101
CONSUMER AWARENESS AND PERCEPTION STUDY	102
<i>Purpose, Methodology & Results</i>	102
APPENDIX A: ONLINE COMMUNITY SURVEY OPEN-ENDED RESPONSES	
APPENDIX B: CAP STUDY OPEN-ENDED RESPONSES	
APPENDIX C: OUTSIDE PERCEPTION STUDY	
APPENDIX D: BRAND BAROMETER STUDY	

ABOUT NORTH STAR DESTINATION STRATEGIES

North Star Destination Strategies comprises over two dozen talented individuals dedicated to growing community brands through integrated marketing solutions. North Star offers communities a combination of research, strategy, creativity and action. This process – called Community BrandPrint – provides direction for the community's brand development, like a blueprint guides the construction of a home. And just like a blueprint, the priorities and targets of each Community BrandPrint are stated in clear and unambiguous language. The resulting brand personality is as revealing as an individual's fingerprint, and just as unique.

ABOUT THE BRANDPRINT PROCESS

Through the Community BrandPrint process, North Star determines Los Alamos County's most relevant and distinct promise. From that promise, we create a strategic platform intended to generate a brand position in the minds of residents, visitors and businesses. We then develop a Brand Identity Package (creative expressions), all of which reinforce the strategic positioning of the brand.

This process is divided into four stages: Understanding, Insights, Imagination and Evaluation. The following report includes the Understanding, Insights and Evaluation phases of the work. The Imagination Phase of the work including the Brand Identity Package is presented under separate cover.

BRANDING PARTNERS

Los Alamos County, NM contracted with North Star Destination Strategies to determine the community's true, unique and relevant brand position to help the area stand out in the marketplace. This Executive Summary represents a snapshot of the critical highlights from the Understanding and Insights phases of the Brand Print Process. Detailed research findings are compiled in the report that follows.

UNDERSTANDING (*Research findings*)

North Star conducted more than a dozen pieces of research to identify what differentiates Los Alamos County from its neighbors and competitors. By examining the community (stakeholders, residents), consumers (visitors, regional and state officials in tourism and economic development) and the competition (neighboring and other communities), North Star determined a strategy for Los Alamos County to assert across all community assets to implement an effective, meaningful and relevant brand. Important findings are summarized below.

Los Alamos County has held a unique place in the national historic conversation. Once completely a secret city and considered "off the grid," the scientific discoveries, innovation, and technological advances that Los Alamos County contributed to national defense interests solidified the area's reputation as a place of breakthroughs, highly educated individuals, and impactful research. Although Los Alamos County is no longer a secret city, the science, engineering, and technological impact is still felt throughout the United States and the world. What was once a national defense mission at the National Lab, Los Alamos County now offers a wide spectrum of assets for a resident, visitor or business. But the heritage of science and discovery can still be felt today.

Research affirmed the Los Alamos National Lab as one of the premier assets in the County, especially as it pertains to economic development or business growth interests. The presence of highly educated, intelligent, and critical thinkers in the County make the Los Alamos area a hotbed for talent (a key site-selector message). The County should effectively claim these interests and assets as the word is spread about Los Alamos through branding and marketing efforts. But, as research showed, there is an asset that competes with the National Lab that presents Los Alamos County's greatest future opportunity. In various instances during North Star's research, outdoor recreation outscored the National Lab as the area's top asset. This doesn't diminish the Lab's impact in the County; on the contrary, it shows that internal and external perspectives see outdoor recreation as a priority for messaging and brand development. Your residents and visitors can enjoy high-altitude training on area trails and can head out on a snowy Saturday and hit the slopes at Pajarito Mountain.

The County's strong schools, excellent public safety and nearby assets like the Bandelier National Monument and the Valles Caldera make the Los Alamos area a strong destination as a place to live. In order to attract more residents to Los Alamos County, which is a significant opportunity for the area, a few challenges must continue to be addressed. Research showed County residents desire a comprehensive selection of entertainment options, restaurants and

retail variety. Furthermore, many view the housing stock in Los Alamos County as expensive and, in some instances, giving a run-down or neglected impression.

Other challenges that research identified included the desire for residents to have a place to gather in Downtown Los Alamos with lots of options for boutique shopping, eateries, merchants and nightlife. Also, many conversations mentioned a sense of “analysis paralysis” in Los Alamos County that keeps projects from gaining significant forward momentum.

As with any community, Los Alamos County can capitalize on several opportunities for future growth and improvement. Aside from the aforementioned opportunities of resident recruitment and retail/entertainment/restaurant growth, the greatest opportunity for the area is a focus on diversifying the local economy to withstand fluctuations at the National Lab. Also, many see tourism growth as an ideal opportunity for the County and would allow the area to increase foot traffic to local shops. Finally, creating an affordable environment for housing in Los Alamos County will go a long way in attracting potential residents.

All of these assets and future opportunities work to create an environment that residents, visitors, and businesses can enjoy. After thorough research, a variety of assets, impressions, and attributes make up the Los Alamos County community. But a defining characteristic of the area sets the County apart in the marketplace. The presence of well-educated, intelligent individuals in the County with a great deal of brain power is a competitive advantage for the County. Furthermore, the County provides an ideal learning environment at the K-12 level that fosters future scientists, mathematicians, engineers and other highly trained professionals. In fact, “educated” and “intelligent” were descriptions that consistently ranked highest throughout the research. Creating a strong brand identity that effectively captures the intelligent, active, healthy, and unique community in Los Alamos County will go a long way in impacting inside and outside perceptions of the area.

STRATEGIC BRAND PLATFORM

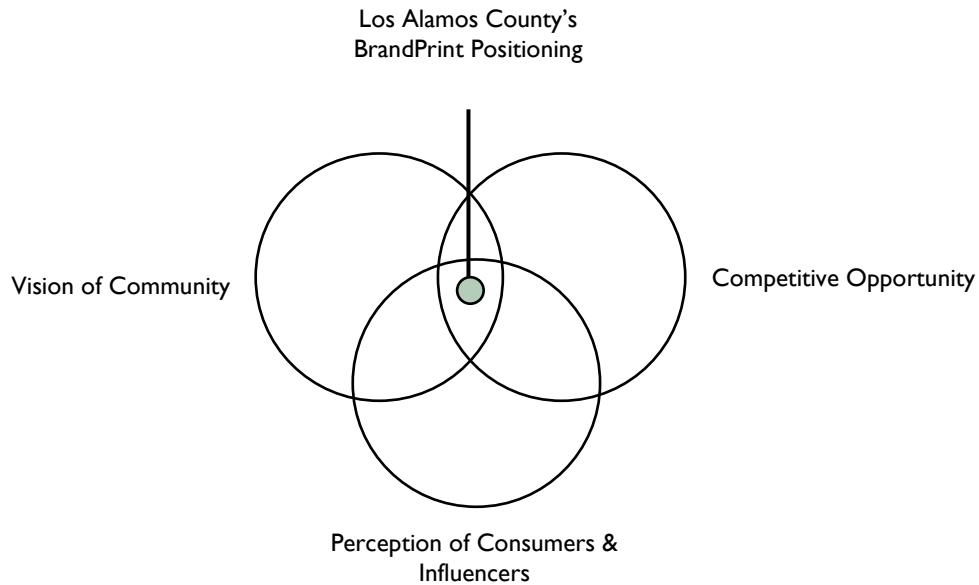
North Star funnels strategic insights for the brand into a single sentence: the brand platform. The brand platform is used as a filter for the formation of creative concepts and implementation initiatives in the Imagination phase of this project. All communications, actions and product development should connect to the essence of this relevant and defining statement.

Target Audience	For those who never stop questioning what’s possible,
Frame-of-Reference	Los Alamos County, in the elevated outdoors of northern New Mexico and home to the Los Alamos National Lab,
Point-of-Difference	is where some of the world’s best brains power the breakthroughs that shape our world
Benefit	so you are challenged to think bigger and live brighter.

WHERE THE BRAND HAS BEEN AND WHY

This stage addresses the community’s current brand positioning. We assess the environment; demographics and psychographics of residents; perceptions of visitors, residents and stakeholders; current communications and the competition. Most importantly, we gather input from Los Alamos County and its constituents.

We are looking for current attitudes regarding the brand. We are also trying to spot behavioral trends that exist around that brand. This stage is critical because it uncovers the relationship between three factors: the community's physical qualities, communication materials and the position the community holds in the minds of its consumers.



IN-MARKET STUDY

Purpose

The purpose of the In-Market Study is to gain understanding of the perceptions and attitudes of Los Alamos County residents and stakeholders towards their community and to experience first-hand what makes it a unique destination for visitors, residents and businesses.

Methodology & Results

The following summary reflects observations and input received during the North Star Destination Strategies In-Market visit from March 12-14, 2013. The information is not meant to be all-inclusive, but rather highlight the most common themes experienced on the trip. This includes an area familiarization (FAM) tour, stakeholder focus groups, stakeholder one-on-one interviews and local community one-on-one perception interviews.



MATERIALS REVIEWED

This is a sampling of the materials reviewed as part of the Research and Materials Audit, prior to the In-Market Study.

Tourism Materials

- Fuller Lodge Historic Treasure brochure
- Historic Sculptures brochure
- National Park Service
 - Explore Bandelier flyer
- Valles Caldera National Preserve
 - Super Volcano brochure
- Historical Walking Tour map of Downtown Los Alamos brochure/map
- Pajarito Mountain Ski & Snowboard brochure/map
- Pajarito Mountain rate card (2012/2013)
- Museums brochure
- Puye Cliff Dwellings brochure
- Creative District flyer
- Jemez Adventure Recreation and Attraction map

Chamber of Commerce and Development Corporation

- Mind Your Business newsletter (March/April 2013)
- FyiLA.com flyer

Economic Development

- Economic Development Division Area Communications Collateral print off (February 2013)
- Economic Development print off from Los Alamos County website
- ESRI
 - Retail Market Place Profile print off (April 2012)
 - Executive Summary Report print off (April 2012)
 - Household Budget Expenditures (April 2012)
 - Retail Market Profile (2012)
- Census Quickfacts print off (2011)
- Labor Analysis Summary (2010)
- Economic Base Report
- Industry Overview Report
- Local Economic Development Act Report
- Downtown Los Alamos Architectural Standards Ordinance (2007)
- Northern New Mexico Region Economic Development Analysis (March 2012)
- Destination Development Incorporated Assessment (2010)

Miscellaneous

- Remax real estate folder
 - Real Estate Report (February 2013)
 - Leadership Los Alamos Economic Development Session report (January 2012)
 - Los Alamos County map
- “Community in Motion” folder
 - Another copy of: Historical Walking Tour Map of Downtown Los Alamos, Explore Bandelier flyer, and PajaRito Mountain Ski & Snowboard map/brochure
 - Concert Association (2012/2013)
 - National Laboratory Lecture Series brochure (2013)
 - Wine Tours notecard flyer
 - Tour the Atomic City postcard
 - Economic Vitality Update newspaper (Summer 2010)
 - Land Transfer and Economic Self-Sufficiency progress report (2007)
- “Community in Motion” Citizen Handbook (2009)
- Self Help, Inc nonprofit brochure
- Family Strengths Network nonprofit brochure
- Atomic City Transit postcard
- Ride Guide Atomic City Transit brochure/map

The following highlights the conversations from the In-Market Visit.

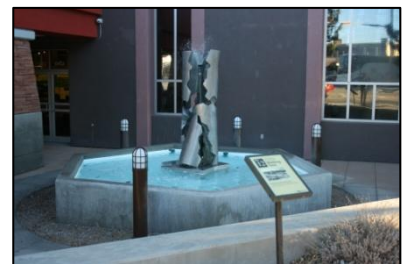
MOST MENTIONED ASSETS

- Los Alamos National Lab
- Outdoor recreation
- Good K-12 schools
- Highly educated (highest PhD per capita in the Country)
- Very wealthy
- Bradbury Science Museum
- Fuller Lodge
- Safety
- Hiking and biking capital of the region
- Eclectic and quirky residents
- Appreciation of the Arts and events



MOST MENTIONED CHALLENGES

- Expensive housing, very poor housing stock
- Getting commuters to live in the County
- Lack of entertainment, shopping and nightlife
- Struggling downtown with no sense of place
- Some outside perceptions that Los Alamos County is radioactive
- Most buildings are post-WWII
- Threat of fires
- Lack of outdoor recreation outfitters
- Residents don't spend their money
- Lack of tech transfer and spin off businesses from Lab
- Commercial rent is 50% higher in Los Alamos County
- Lack of young professionals
- Fear of using atomic identity
- Analysis paralysis



MOST MENTIONED OPPORTUNITIES

- Amplify outdoor recreation options
- Capturing commuters to live in the community
- Fixing housing situation
- Diversify economy
- Finding ways that art, science, outdoors and technology can intersect



ONLINE COMMUNITY-WIDE SURVEY

Purpose

The purpose of the Online Community-wide Survey is to gain a quantitative measure of the community's perceptions of Los Alamos County.

Methodology & Results

North Star developed an online survey based on the results of In-Market conversations. All questions were multiple choice, allowing for a quantitative measure of resident perceptions. Community members were encouraged to participate after the survey was posted on County websites and publicized in local media. 703 survey responses were collected for this survey, allowing for a margin of error of +/- 3.62 at the 95% confidence level.

The graphs on the following pages highlight responses for each question on the corresponding survey, allowing side-by-side comparison of results. Please refer to the Research Report CD and **Appendix A** for a detailed list of all "Other" responses.

Los Alamos County, NM Community Survey

2. If you had to pick a word/phrase to describe Los Alamos County, it would be...CHOOSE TWO ANSWERS

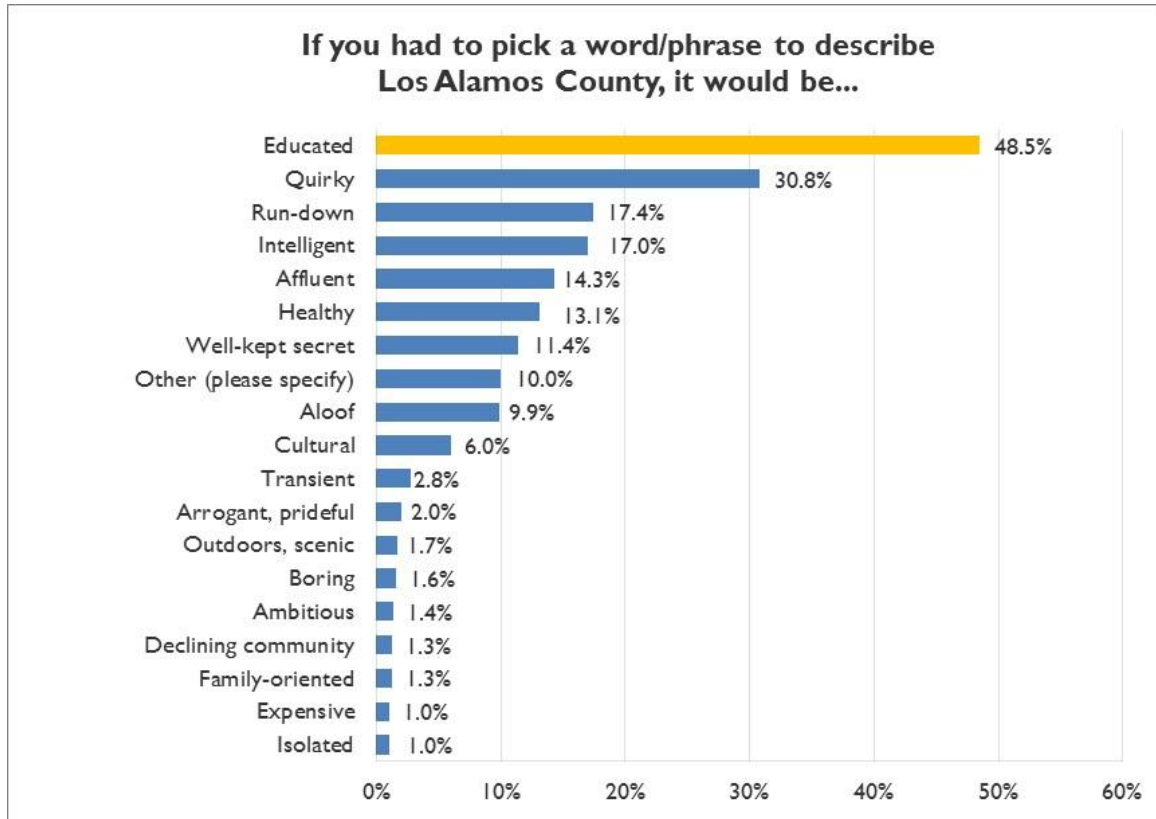
- Quirky
- Healthy
- Ambitious
- Educated
- Intelligent
- Transient
- Aloof
- Run-down
- Cultural
- Affluent
- Well-kept secret
- Other (please specify)

3. In your opinion, Los Alamos County's greatest asset is...CHOOSE TWO ANSWERS

- Safety
- Unique history
- Arts and cultural assets
- Outdoor recreation (skiing, biking, hiking, etc.)
- Los Alamos National Laboratory
- Good schools
- Downtown Los Alamos
- Highly educated scientists and professionals
- Sciences and technology businesses and start ups
- Affluence
- Diversity
- Other (please specify)

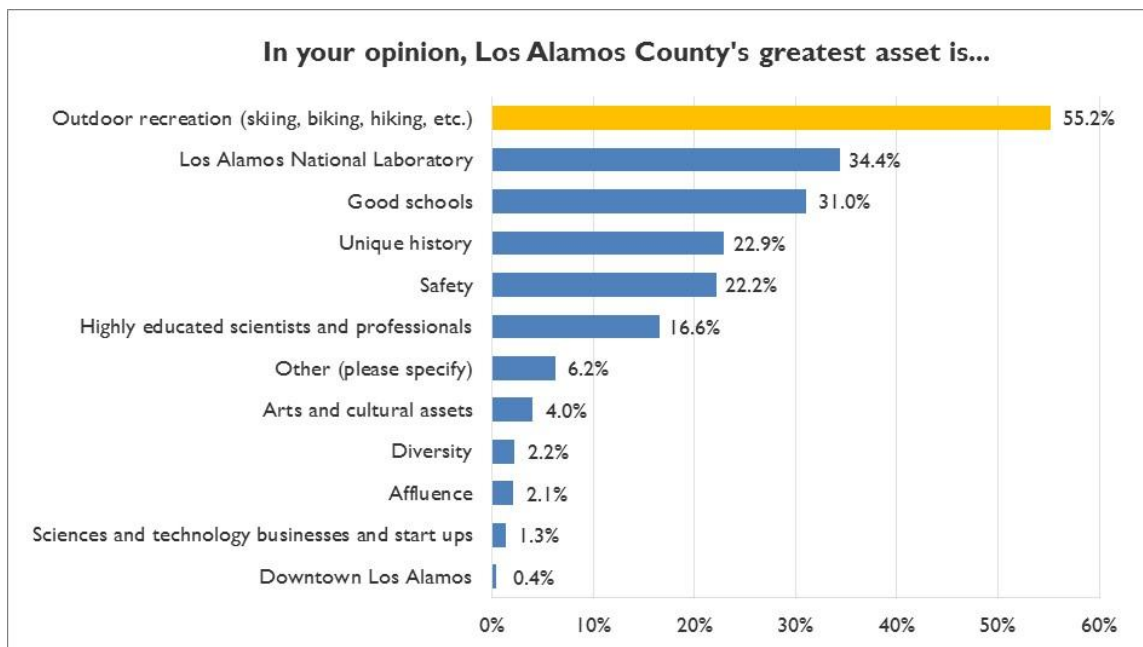
Los Alamos County Online Community Survey

Describing Los Alamos County: Being home to one of the premier science and research institutions in the country, a top description of “educated” is fitting.



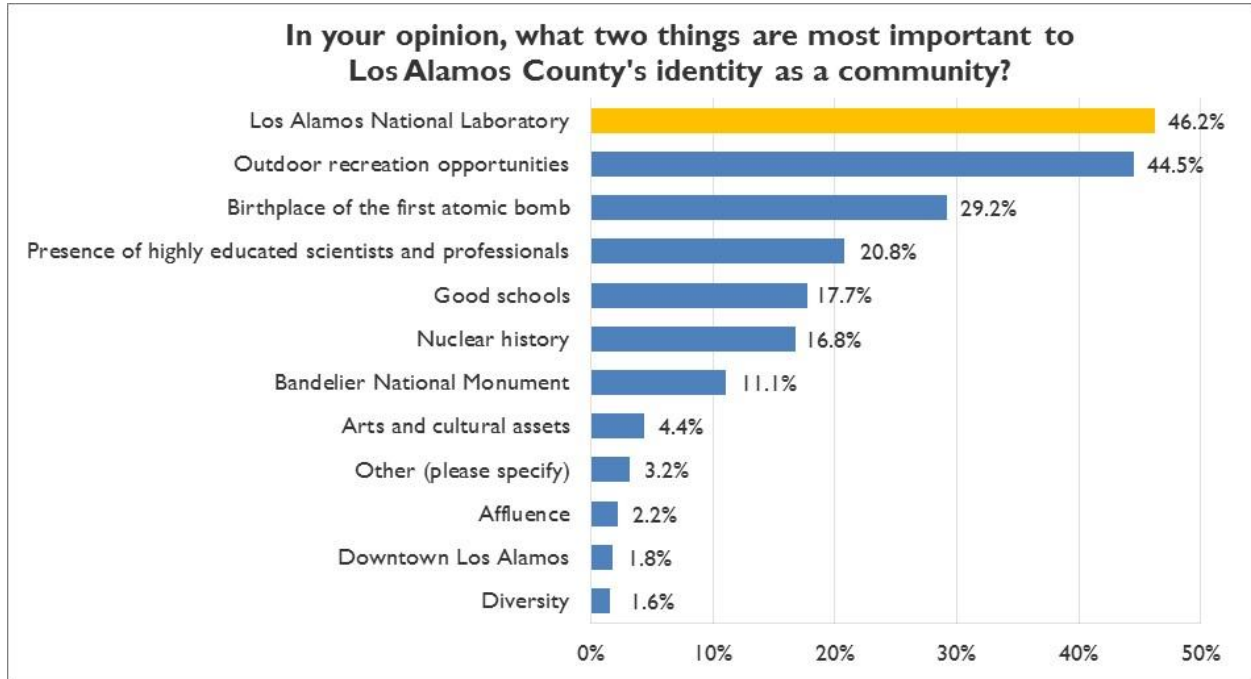
Other: Historic, quiet, sheltered

Assets: Residents view the County’s outdoor recreation as a preferred asset over the National Lab.



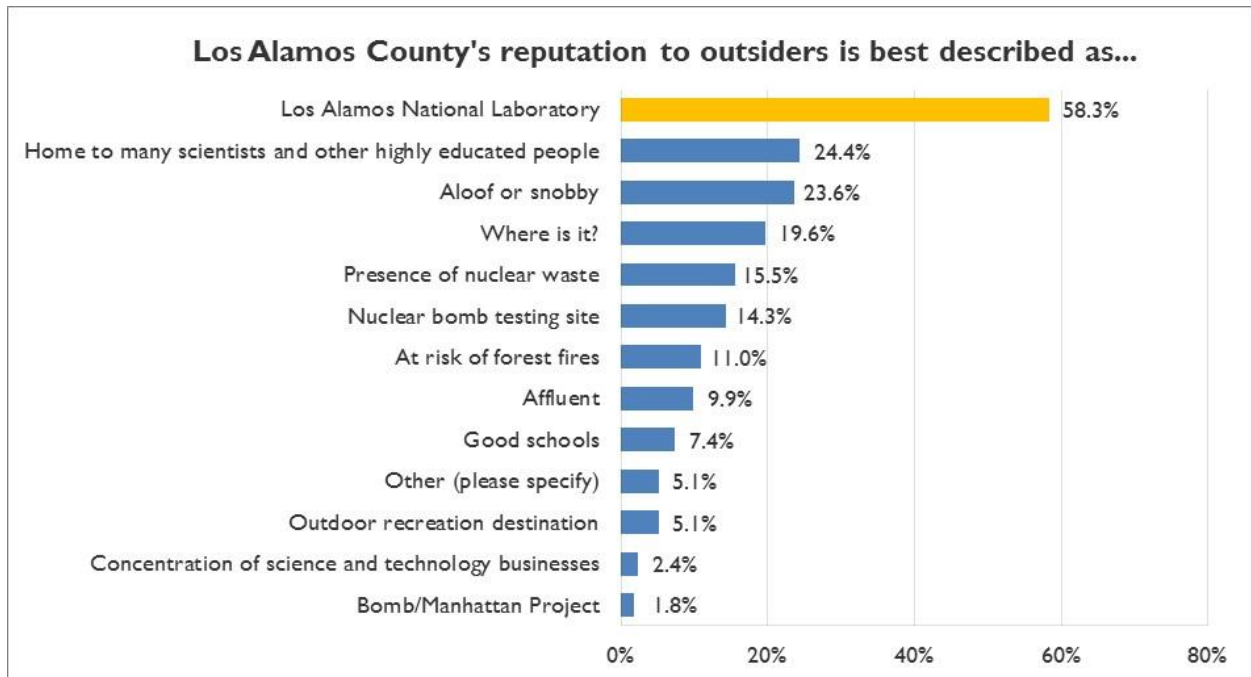
Other: Beauty/nature, location

Community Identity: The Los Alamos National Laboratory is most important to Los Alamos County’s identity followed closely by outdoor recreation, highlighting both as top reputation builders.



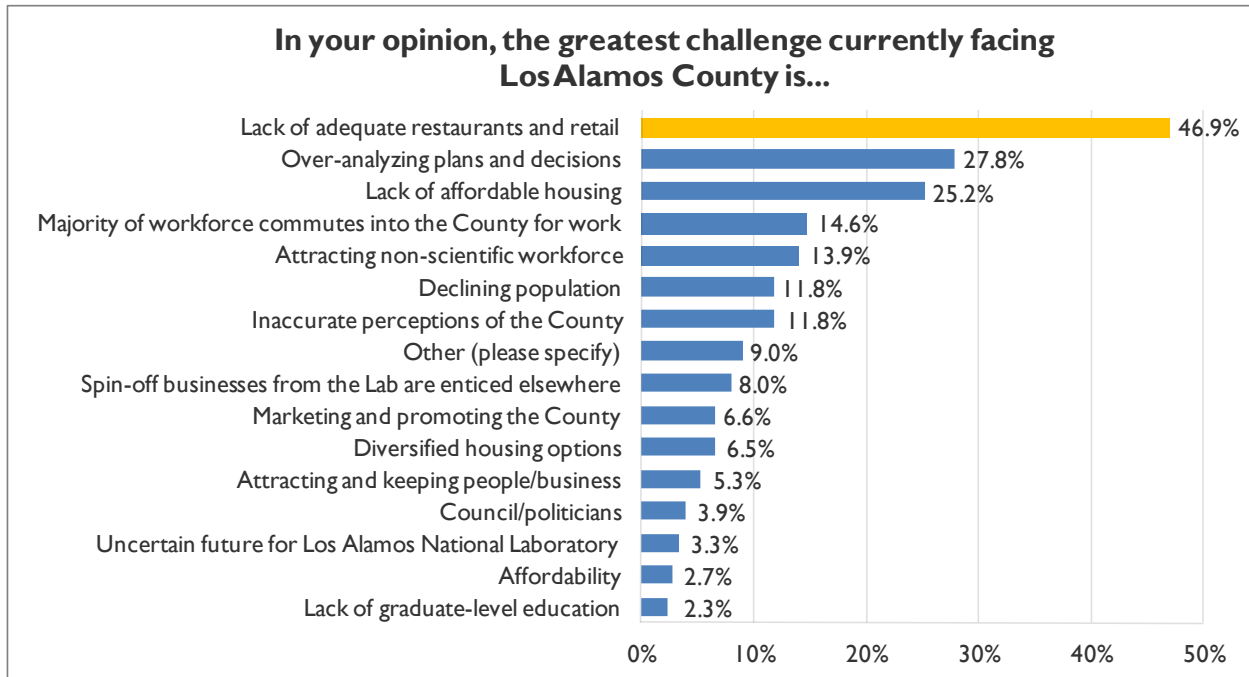
Other: Family friendly

Outside reputation: Residents believe that outsiders describe you as a haven for scientists and educated individuals.



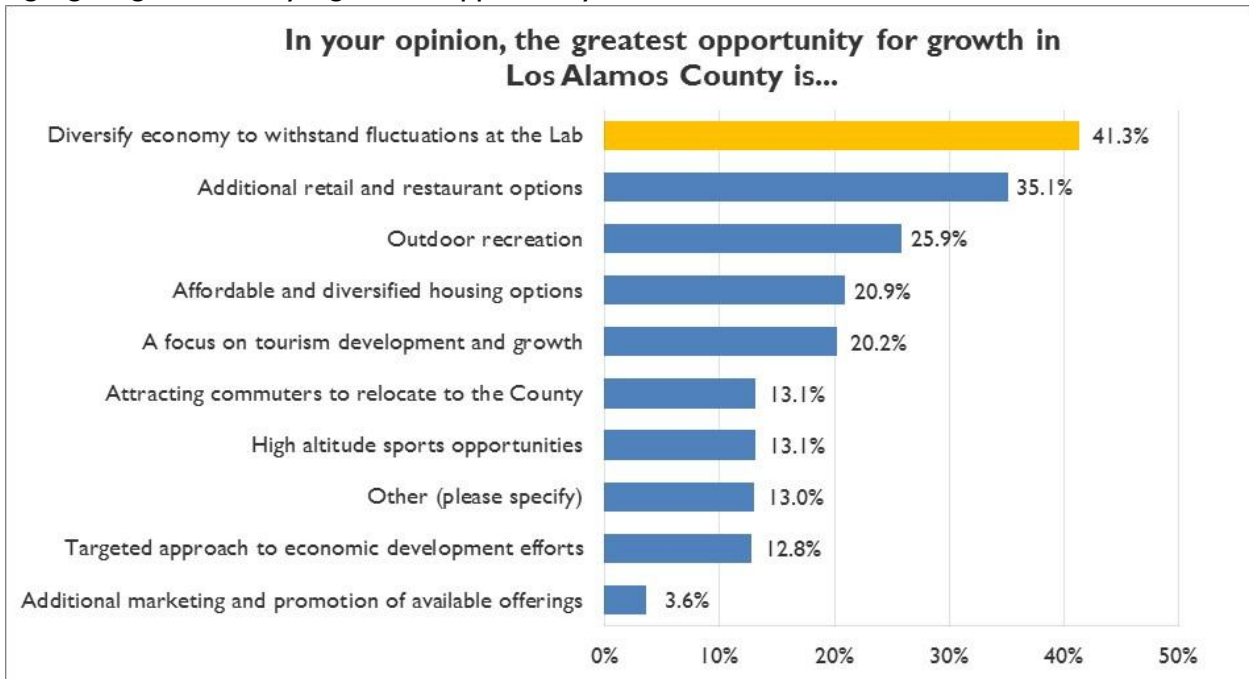
Other: Unkempt, uncultured, weird

Challenges: Research showed the lack of adequate shopping and dining as a top challenge for the County.



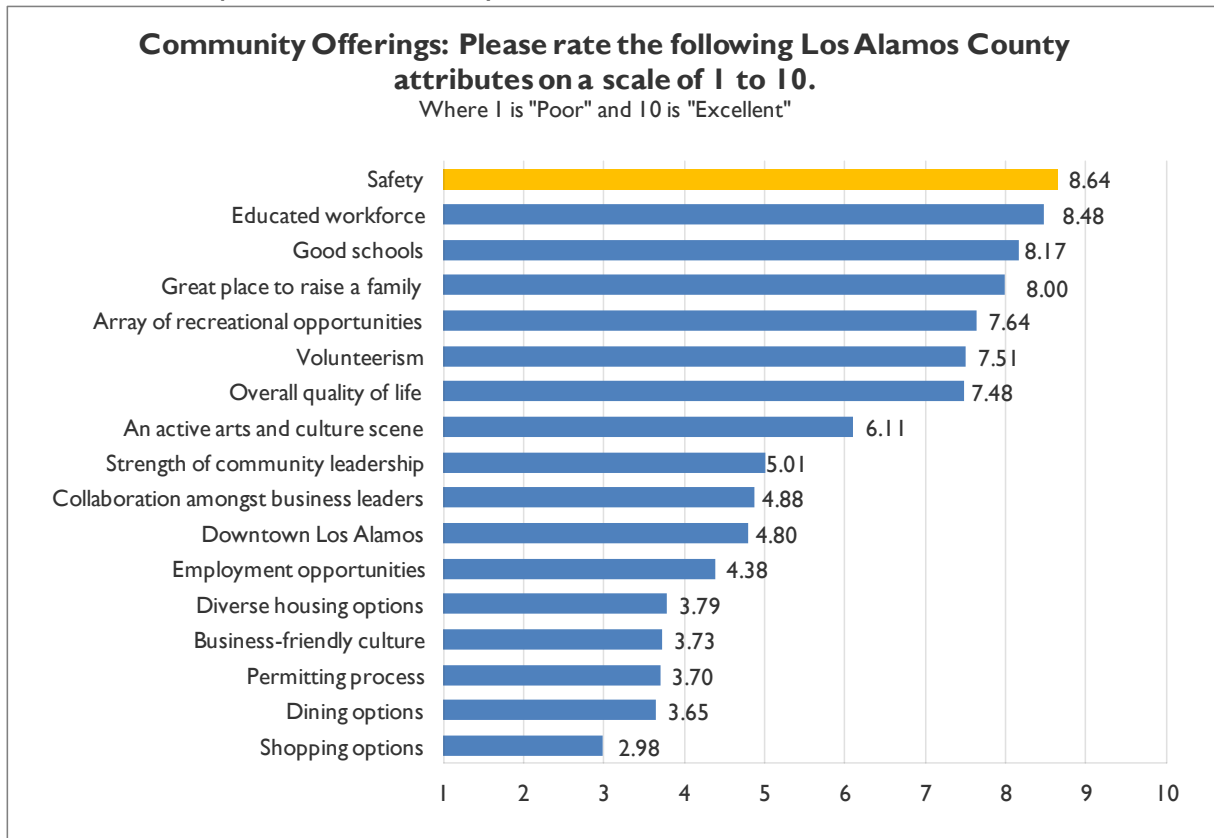
Other: Diversity, shuts down at night

Opportunities: Many see the County as solely relying on the Lab for economic growth, highlighting the County’s greatest opportunity of economic diversification.



Other: Remove blight, market as retirement community

Attributes: Respondents rated safety and educated workforce as the best attributes.

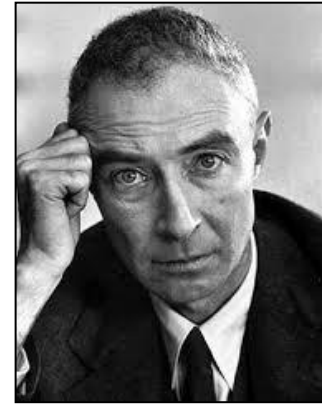
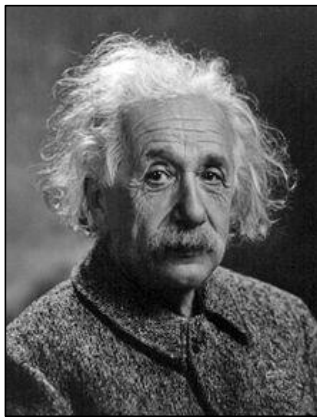


In your own words, describe the impact the Los Alamos National Laboratory has on the Los Alamos County community.

- *“There is no Los Alamos County without the Laboratory.”*
- *“As LANL goes, so does the town. LANL has helped enhance LAC through employment and economy, but it is also a double-edged sword. LANL leases numerous buildings in the town site which drives up rent for independent retailers making it harder to diversify LAC (i.e. dining, shopping, activities).”*
- *“Fluctuations in LANL funding have a direct impact on the amount of funding to county programs. Jobs cut at the Lab means a negative impact on the community overall. There's a direct relationship between LANL prospering and Los Alamos County prospering.”*

**If the Los Alamos County community were a famous person, who would it be?
Why?**

- Albert Einstein
 - *“Brilliant, but not good at simple, everyday living tasks.”*
- Lindsay Lohan
 - *“They seem to be incapable of connecting their decisions and actions with the outcomes.”*
- J. Robert Oppenheimer
 - *“Smart, strong, hard working, working to help the County.”*

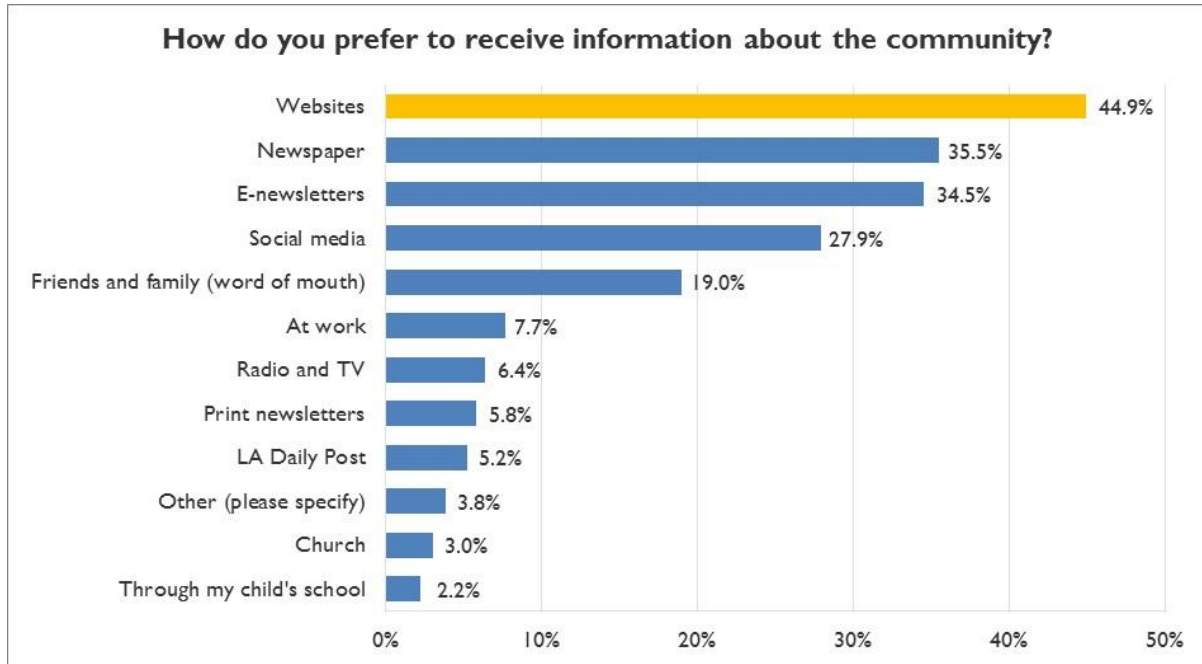


**If the Los Alamos County community were a consumer brand, what would it be?
Why?**

- Apple
 - *“Because they have to invent it themselves even if they don't always get it right.”*
- REI
 - *“Their products are generally high-tech, there is an outdoors focus, and they can be alternately perceived as high-end and/or snobby depending on the audience.”*
- Microsoft
 - *“Solid product in its prime, but unable/unwilling to anticipate change, thus losing its edge in a competitive market.”*

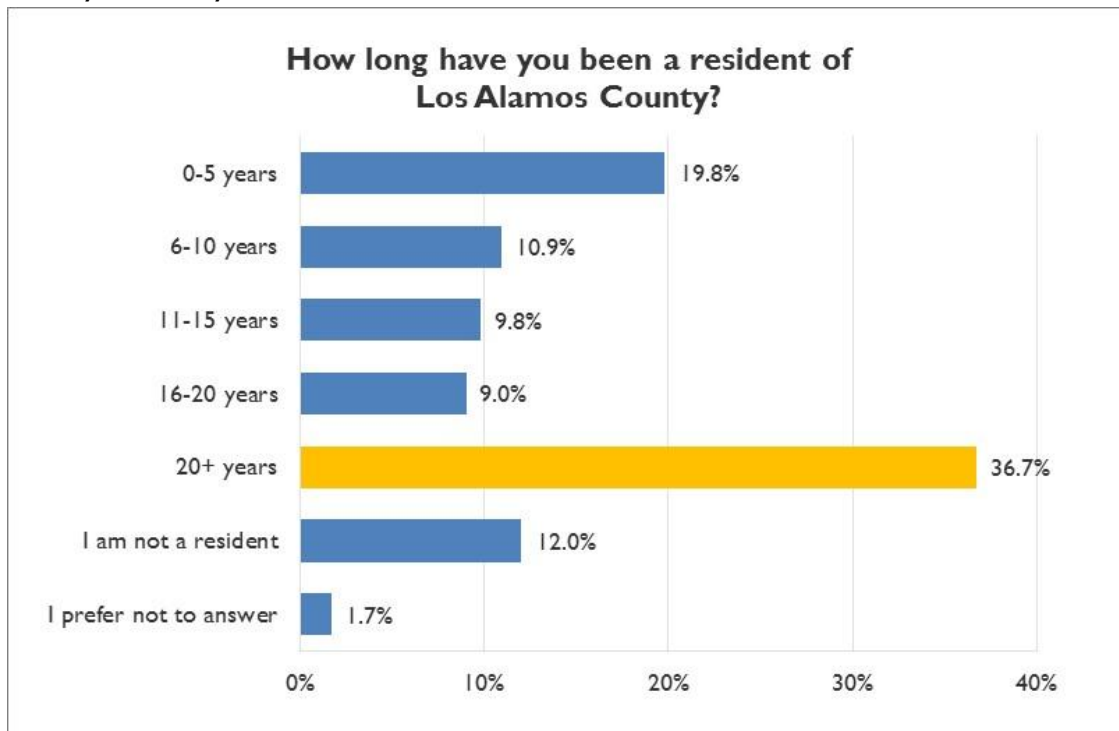


Information: Respondents prefer to receive information about the community on a website or news platform.

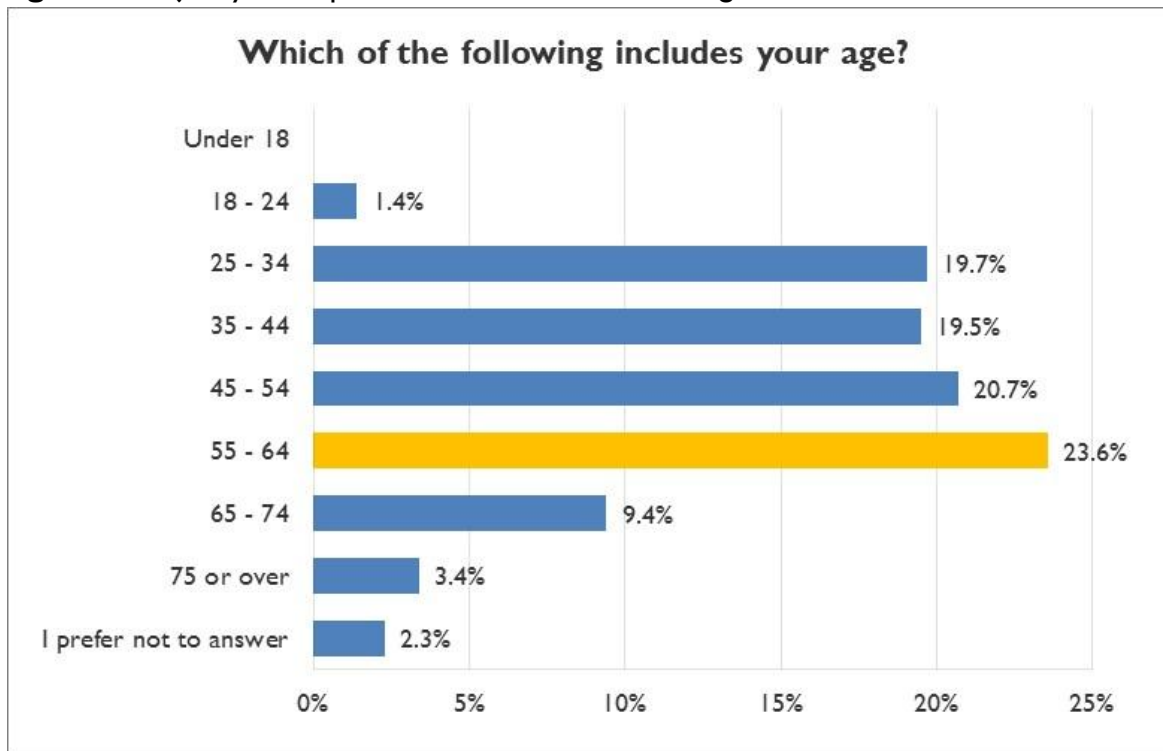


Other: Signs

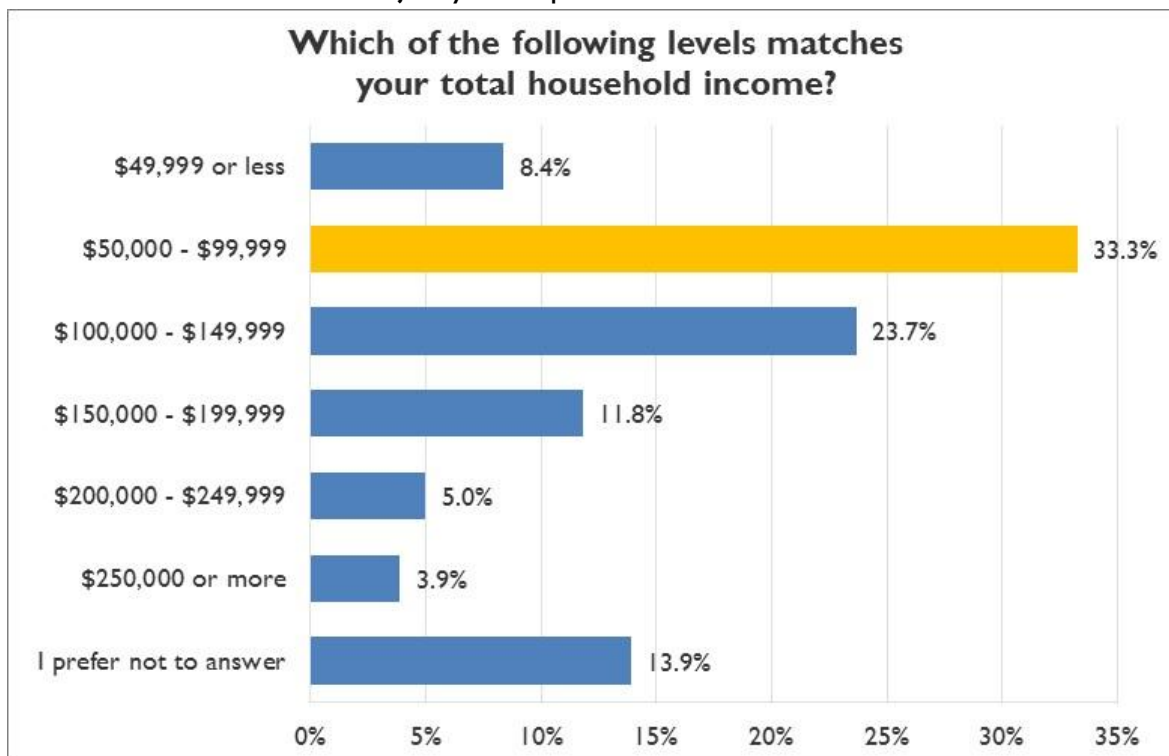
Living in Los Alamos County: The majority of respondents have lived in Los Alamos County for 20+ years.



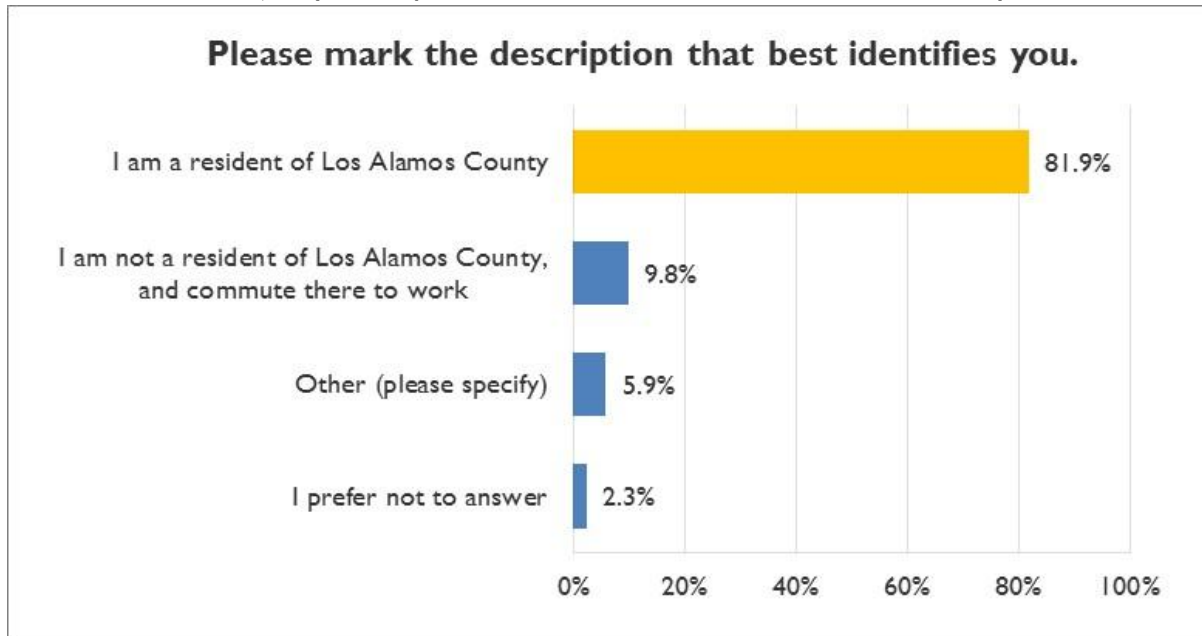
Age: The majority of respondents were between the ages of 55 and 64.



Household income: The majority of respondents have a HHI between \$50,000 and \$99,999.

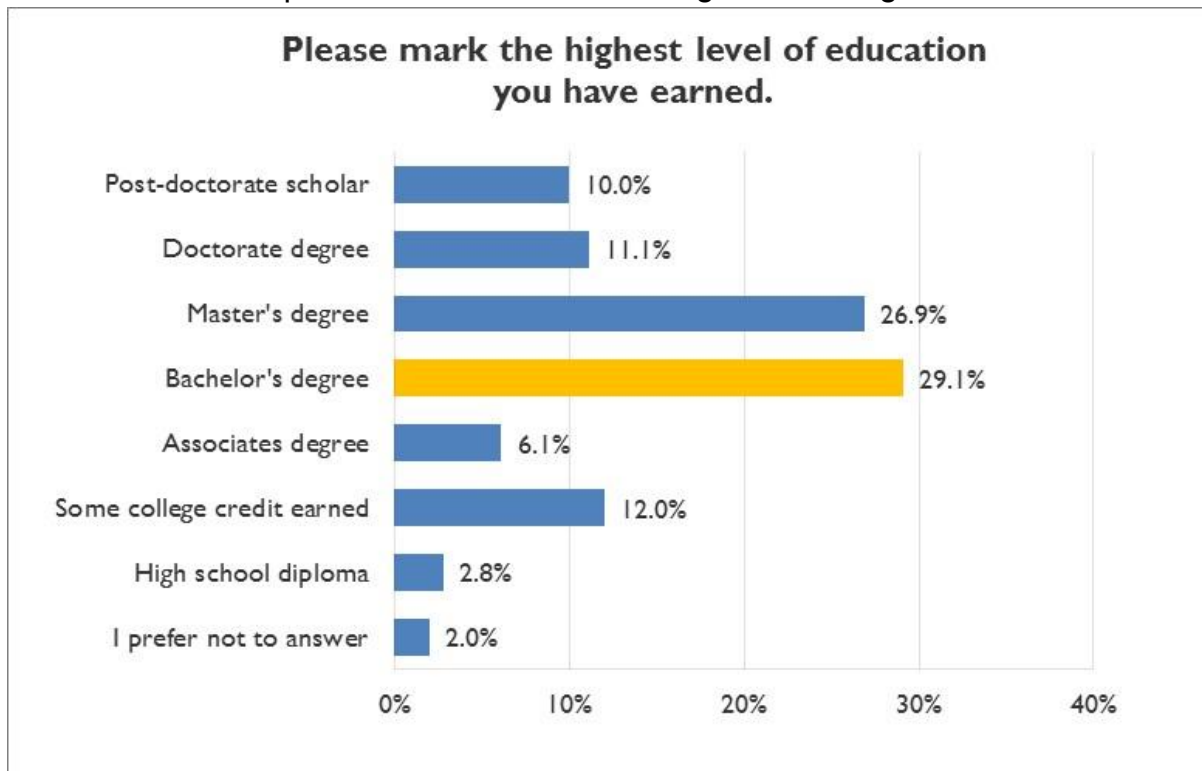


Residents: The majority of respondents are residents of Los Alamos County.



Other: Former resident

Education: Most respondents have some form of degree from a higher education institution.



COMMUNITY BRAND BAROMETER

Purpose

The Community Brand Barometer measures strength of the Los Alamos County brand according to:

- Resident satisfaction with and advocacy for Los Alamos County as a place to live, work and visit.
- Los Alamos County satisfaction / advocacy relative to the nation.

Methodology & Results

Significant research* on a wide variety of customer satisfaction metrics found that a single powerful question has the greatest ability both to measure current resident satisfaction and predict future community growth. That question, “Would you recommend your county to a friend or colleague as a place to live (or work or visit)?” is powerful because it surpasses the basic model of economic exchange, where money is spent for products or services. People who score their community high on the Brand Barometer actively recruit new residents, visitors and businesses through positive word-of-mouth marketing. It is very personal. By making a strong recommendation, they are willing to risk their own character, trustworthiness and overall reputation for no tangible reward.

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants in the community-wide surveys answered three questions:

- Would you recommend living in Los Alamos County to a friend or colleague?
- Would you recommend visiting Los Alamos County to a friend or colleague?
- Would you recommend conducting business in Los Alamos County to a friend or colleague?

Responses are measured on a 10-point scale with 1 being “Not at all likely” and 10 being “Extremely likely.” Results are presented on an individual respondent level as well as an aggregate Brand Advocacy Score. Scores are calculated with response percentages in the following categories:

- Promoters (9 or 10) – Loyal residents who will continue fueling your growth and promoting your brand.
- Passives (7 or 8) – Satisfied but unenthusiastic residents who are vulnerable to other opinions and brands.
- Detractors (1-6) – Unhappy residents who can damage your brand and impede growth through negative referrals.

$$\text{Brand Advocacy Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

Los Alamos County’s Brand Advocacy Score can then be compared to a benchmark score that has been derived for the entire nation. North Star employs multiple survey methods through proprietary sources to determine national averages. Scores represent a stratified random sample of the entire U.S. population and are updated on a regular basis. You can use this information to track your own brand performance relative to national trends over time. In addition, you can repeat the Community Brand Barometer after a designated period and compare the results to your own benchmark score for an on-going metric of how community attitudes change over time and in response to specific events or activities.

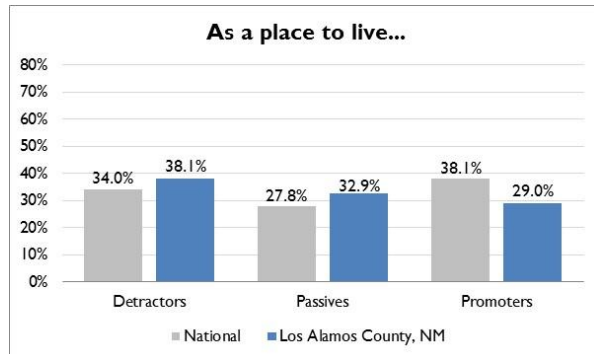
*Research conducted by Satmetrix Systems, Inc., Bain & Company and Fred Reichheld, author of “The One Number You Need to Grow,” Harvard Business Review (Dec. 2003).

BRAND BAROMETER RESPONSES

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend living, visiting or conducting business in Los Alamos County ...to a friend or colleague?

Living

Living in Los Alamos County, NM		
1	6.97%	Detractors 38.12%
2	3.13%	
3	4.69%	
4	4.13%	
5	12.94%	
6	6.26%	
7	12.94%	Passives 32.86%
8	19.91%	Promoters 29.02%
9	10.95%	
10	18.07%	

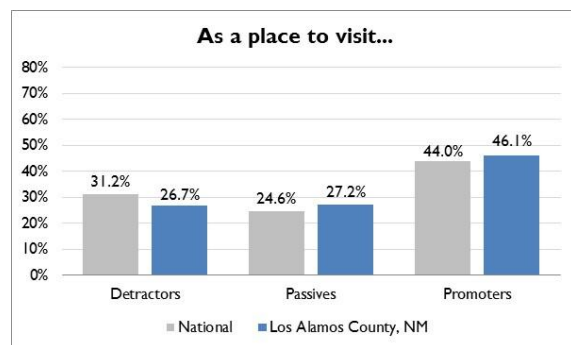


Observations:

- Nearly 30% of the Los Alamos County community acts as Promoters of the area. This represents a strong core group of ambassadors for the County.
- Just over 30% of respondents are Detractors of living in Los Alamos County. This is likely the group of residents concerned about housing affordability and access to dining and retail.

Visiting

Visiting Los Alamos County, NM		
1	2.99%	Detractors 26.74%
2	2.42%	
3	3.98%	
4	3.41%	
5	7.54%	
6	6.40%	
7	9.67%	Passives 27.17%
8	17.50%	Promoters 46.09%
9	14.79%	
10	31.29%	

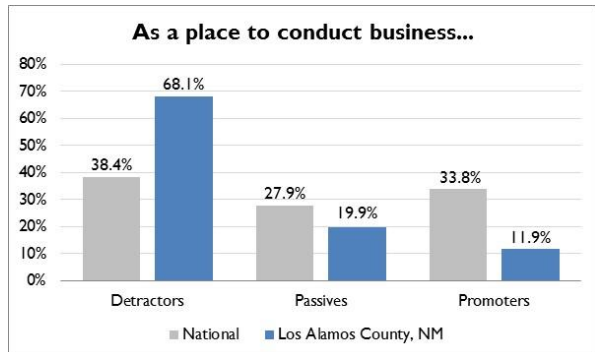


Observations:

- Close to half of Los Alamos County residents are Promoters of their community as a place to visit. This number shows an awareness among residents of what Los Alamos County has to offer to visitors, such as outdoor recreation.
- The Community Survey showed overwhelming support and interest for outdoor recreation opportunities. This is a primary visitor asset and likely explains the high percentage of Promoters in this category.

Conducting Business

Conducting Business in Los Alamos County, NM		
1	9.96%	Detractors 68.14%
2	9.53%	
3	9.96%	
4	8.11%	
5	20.20%	
6	10.38%	
7	9.67%	Passives 19.91%
8	10.24%	Promoters 11.95%
9	4.41%	
10	7.54%	



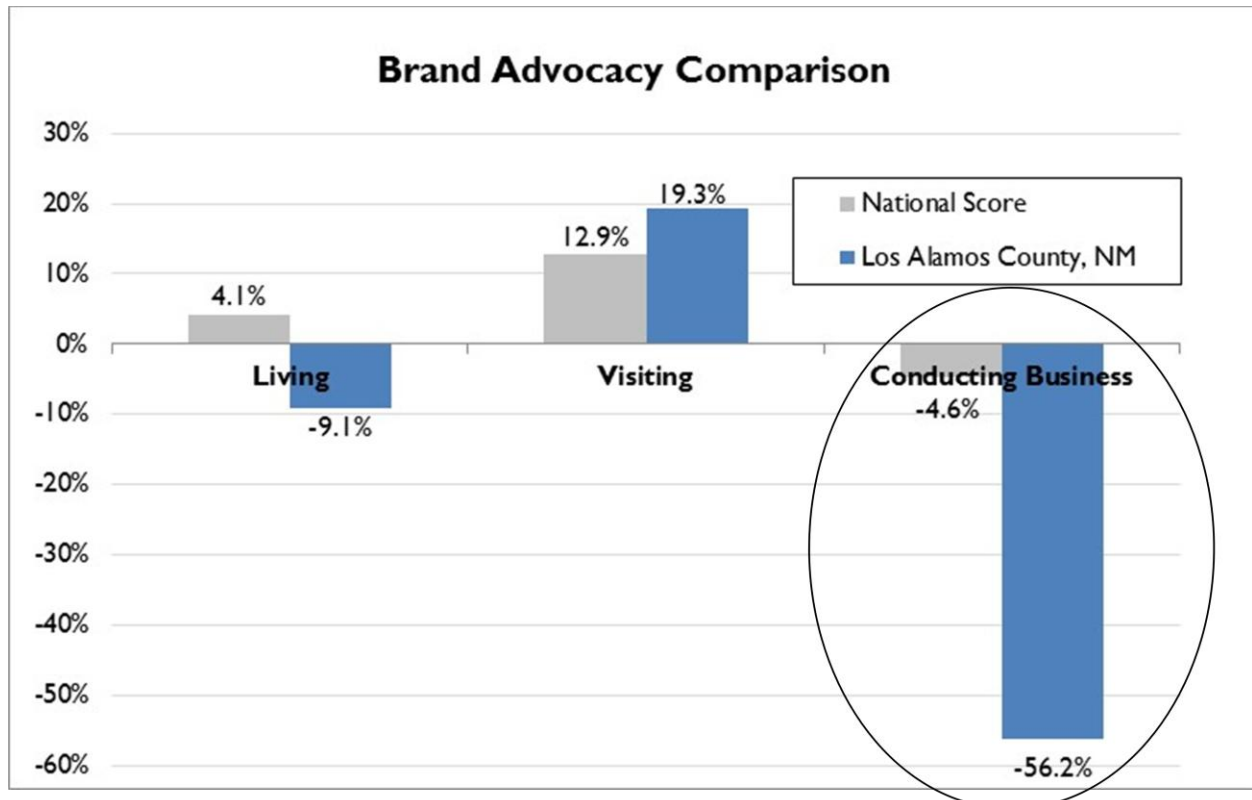
Observations:

- Economic development and conducting business represent the greatest opportunity for brand satisfaction in Los Alamos County.
- In-Market conversations and the community survey showed there exists a great deal of concern about the County's dependence on the National Lab. Also, finding ways to address the rising cost of rent and business expenses will go a long way in converting these Detractors into Promoters.

COMPARISON RESULTS | BRAND ADVOCACY SCORES

The chart below illustrates Brand Advocacy scores for Los Alamos County and at the national level in the categories tested – living, visiting and conducting business.

$$\text{Brand Advocacy Score} = \% \text{ Promoters} - \% \text{ Detractors}$$



NOTE: Often the Brand Advocacy Score represents the greatest opportunity for reputation improvement. However, the Conducting Business category results are often negatively influenced by pessimism toward the national economy.

COMMUNITY TAPESTRY STUDY

An Introduction to Community Tapestry™

For the past 30 years, companies, agencies and organizations have used segmentation to divide and group their markets to more precisely target their best customers and prospects. This targeting method is superior to using “scattershot” methods that might attract these preferred groups. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyle and lifestage of the residents and consumers and incorporates a wide range of public and private data.

Segmentation systems operate on the theory that people with similar tastes, lifestyles and behaviors seek others with those same tastes (hence the phrase “like seeks like”). These behaviors can be measured, predicted and targeted. The Community Tapestry™ segmentation system combines the *who* of lifestyle demography with the *where* of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods, identifying distinct behavioral market segments.

Based on the foundation of proven segmentation methodology introduced more than 30 years ago, the Tapestry system classifies U.S. neighborhoods into 12 larger LifeMode groups and within those 12 larger groups, 65 more distinct market segments. Neighborhoods with the most similar characteristics are grouped together while neighborhoods showing divergent characteristics are separated.

Understanding your customers (residents and visitors), knowing customers’ shopping patterns, assessing the media preferences of customers, cross-selling to customers, and successfully retaining existing customers for a lifetime are just some activities that are supported by mining customer files. Some of these marketing activities include:

- Customer profiling
- Media targeting
- Direct mail
- Site analysis

The customer profiles reveal the demographics, lifestyles and product preferences of a community’s consumers. Consumers can be visitors, residents or businesses, anyone who actively buys or sells goods in the County. By understanding who its customers are, more appropriate responses can be formed to address their needs with better messaging, products and services.

Said simply, the more you can learn about your customers (in this case your residents and visitors), the better you can serve them, keep them and find more like them.

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Purpose

A Community Tapestry Study was conducted to understand the target audience's lifestyle in detail. This included complete profiling reports for Los Alamos County residents and a Regional Profile, which consisted of a five county region, including Santa Fe, Rio Arriba, Taos, Sandoval, and Bernalillo Counties.

Methodology & Results

Tapestry represents the fourth generation of market segmentation systems that began 30 years ago. This powerful tool classifies U.S. neighborhoods in several ways, including:

- LifeMode Groups:
 - 12 summary groups based on lifestyle and lifestage
 - Members share an experience (being born in the same time period, facing the same lifestage, having a certain level of affluence, etc.)
- Community Tapestry Segments:
 - 65 groups based on sociographic and demographic composition
 - Considers income, occupation, educational attainment, ethnic origin, household composition, marital/living arrangements, patterns of migration, mobility and communication, lifestyle and media patterns
 - Most distinct level of segmentation

The results from the Tapestry studies can be classified into two main reports:

- Who Report:
 - Profiles the demographic and lifestyle segmentation of the population
 - Classifies the population in each of the ways outlined above and indexes the population under study against national averages
- What Report:
 - Provides a detailed profile of the core population for 37 separate lifestyle and media groups in over 2,200 sub-categories
 - Each category is indexed against the average U.S. resident to determine whether a member of the population under study is more or less likely to exhibit the specific behavior

Key findings from the Community Tapestry reports are shown on the following pages.

For the comprehensive Tapestry Who and What reports, please refer to the Final Research Report CD. For further explanation of any data or methodologies used to analyze the Tapestry reports, please refer to an electronic copy of the Tapestry Handbook by following this link: <http://www.esri.com/library/brochures/pdfs/tapestry-segmentation.pdf>.

COMMUNITY TAPESTRY SEGMENT BREAKDOWN BY LIFEMODE GROUP

The following chart lists all 65 Tapestry Segments under their respective LifeMode Group. The percentages listed are representative of the entire United States and not your community. As you read about Los Alamos County's Segments in the following pages, use the table below as a guide when matching those Segments with their corresponding LifeMode Groups.

For a detailed description of LifeMode groups as well as Tapestry Segments, see the handbook available at <http://www.esri.com/library/brochures/pdfs/tapestry-segmentation.pdf>

SEGMENT BREAKDOWN BY LIFEMODE GROUP	% of U.S. Pop.
L1. High Society	12.7%
01 Top Rung	0.7%
02 Suburban Splendor	1.7%
03 Connoisseurs	1.4%
04 Boomburbs	2.2%
05 Wealthy Seaboard Suburbs	1.4%
06 Sophisticated Squires	2.7%
07 Exurbanites	2.5%
L2. Upscale Avenues	13.8%
09 Urban Chic	1.3%
10 Pleasant-Ville	1.7%
11 Pacific Heights	0.6%
13 In Style	2.5%
16 Enterprising Professionals	1.7%
17 Green Acres	3.2%
18 Cozy and Comfortable	2.8%
L3. Metropolis	5.3%
20 City Lights	1.0%
22 Metropolitans	1.2%
45 City Strivers	0.7%
51 Metro City Edge	0.9%
54 Urban Rows	0.3%
62 Modest Income Homes	1.0%
L4. Solo Acts	6.8%
08 Laptops and Lattes	1.0%
23 Trendsetters	1.1%
27 Metro Renters	1.3%
36 Old and Newcomers	2.0%
39 Young and Restless	1.4%
L5. Senior Styles	12.4%
14 Prosperous Empty Nesters	1.8%
15 Silver and Gold	1.0%
29 Rustbelt Retirees	2.1%
30 Retirement Communities	1.5%
43 The Elders	0.6%
49 Senior Sun Seekers	1.2%
50 Heardand Communities	2.2%
57 Simple Living	1.4%
65 Social Security Set	0.6%
L6. Scholars & Patriots	1.4%
40 Military Proximity	0.2%
55 College Towns	0.8%
63 Dorms to Diplomas	0.4%
L7. High Hopes	4.1%
28 Aspiring Young Families	2.4%
48 Great Expectations	1.7%

SEGMENT BREAKDOWN BY LIFEMODE GROUP	% of U.S. Pop.
L8. Global Roots	8.2%
35 International Marketplace	1.3%
38 Industrious Urban Fringe	1.5%
44 Urban Melting Pot	0.7%
47 Las Casas	0.8%
52 Inner City Tenants	1.5%
58 NeWest Residents	0.9%
60 City Dimensions	0.9%
61 High Rise Renters	0.7%
L9. Family Portrait	7.8%
12 Up and Coming Families	3.4%
19 Milk and Cookies	2.0%
21 Urban Villages	0.8%
59 Southwestern Families	1.0%
64 City Commons	0.7%
L10. Traditional Living	8.8%
24 Main Street, USA	2.6%
32 Rustbelt Traditions	2.8%
33 Midlife Junction	2.5%
34 Family Foundations	0.9%
L11. Factories & Farms	9.5%
25 Salt of the Earth	2.8%
37 Prairie Living	1.0%
42 Southern Satellites	2.7%
53 Home Town	1.5%
56 Rural Bypasses	1.5%
L12. American Quilt	9.3%
26 Midland Crowd	3.7%
31 Rural Resort Dwellers	1.6%
41 Crossroads	1.5%
46 Rooted Rural	2.4%

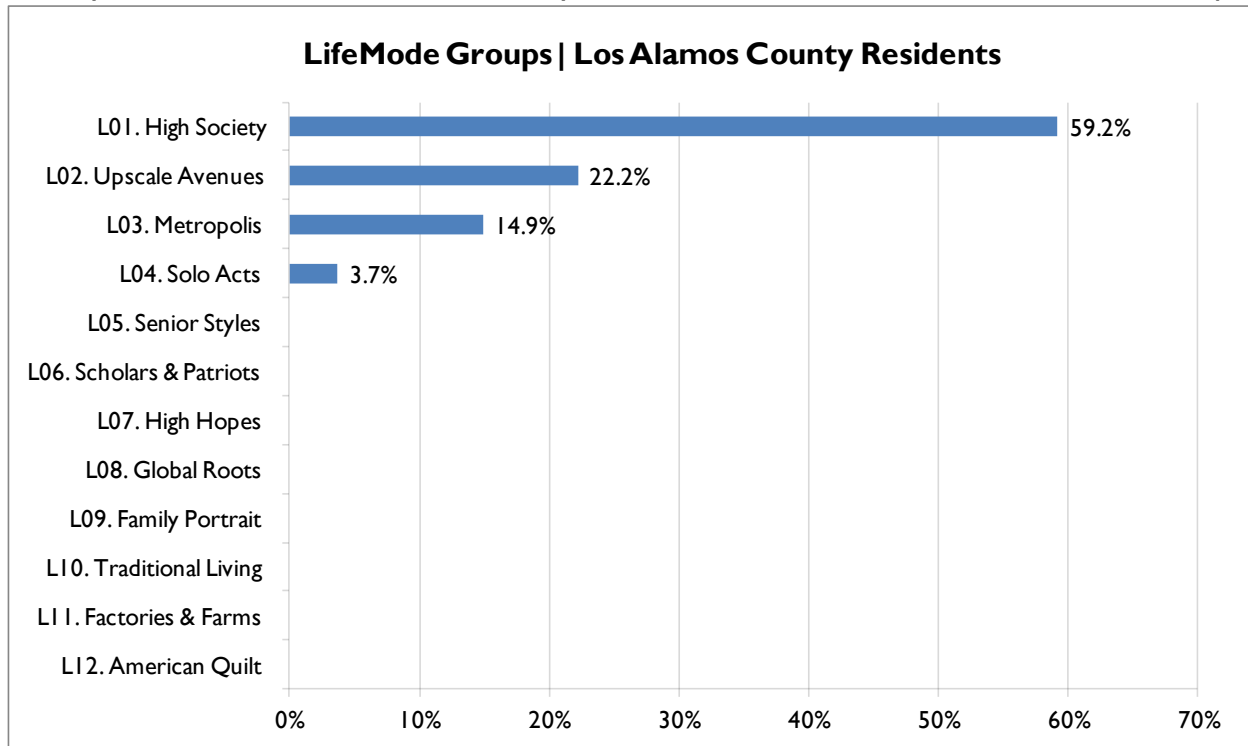


COMMUNITY TAPESTRY WHO REPORT | LIFEMODE GROUPS

The charts below highlight some of the key findings about the Los Alamos County Resident Profile and the Regional Profile as they relate to LifeMode Groups. Remember, members in a LifeMode Group share an experience such as being born in the same time period, facing the same lifestage, having a certain level of affluence, etc.

The number in front of each LifeMode corresponds with the LifeMode Group designation outlined on the community Tapestry Poster. Please refer to the previously mentioned link for more in-depth information on each LifeMode Group. The indexing system you will see referenced below has the U.S. average sitting at 100. Therefore, any index above 100 indicates that Los Alamos County is delivering above the U.S. average in that LifeMode or Tapestry Segment.

Below you can see how Los Alamos County residents are divided into the 12 LifeMode Groups.



Observations: Los Alamos County residents represent four of the twelve LifeMode groups, suggesting a less diverse population. More than half of Los Alamos County residents fall into the *High Society* group.

Top Resident LifeMode Groups: The U.S. average sits at 100.

High Society (59.2%) – Indexed 434 against the U.S. average

- The markets in High Society are affluent and well educated.
- The median household income for this group, \$94,000, is almost twice that of the national median.

- Most households are married-couple families residing in affluent neighborhoods where the median home value approaches \$290,000.
- Residents of High Society are affluent and active—financially, civically, and physically. They participate in a wide variety of public activities and sports and travel extensively.
- Try the Internet or radio instead of television to reach these markets.

Metropolis (22.2%) – Indexed 169 against the U.S. average

- Many are well educated with above average earnings and are successful from years of hard work.
- Median household income is \$65,000+ and median net worth is \$153,000+.
- Prosperous domesticity also characterizes the lifestyle in Upscale Avenues.
- They invest in their homes; the owners work on landscaping and home remodeling projects, and the renters buy new furnishings and appliances.
- They play golf, lift weights, go bicycling, and take domestic vacations. Although they are partial to new cars, they also save and invest their earnings.

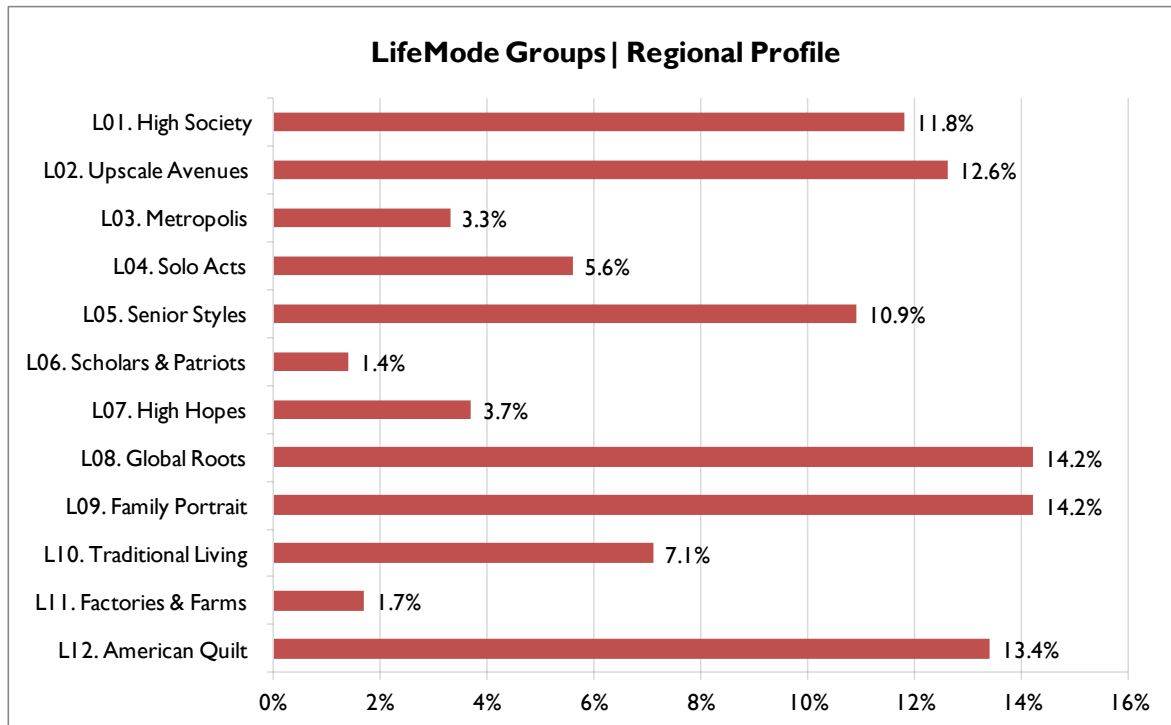
Upscale Avenues (14.9%) – Indexed 284 against the U.S. average

- Those living in larger cities tend to own fewer vehicles and rely more on public transportation; however, workers in most of the *Metropolis* Segments commute to service-related jobs.
- The median household income of the group is \$37,000.
- Their lifestyle is also uniquely urban and media oriented.
- They like music, especially urban and contemporary formats, which they listen to during their commutes. They watch a variety of TV programs, from news to syndicated sitcoms, and would rather see movies than read books.
- The *Metropolis* group reflects the segments’ diversity in housing, age, and income. For example, ages among the segments range from Generation Xers to retirees; households include married couples with children and single parents with children.
- Employment status also varies from well-educated professionals to unemployed.

Solo Acts (3.7%) – Indexed 66 against the U.S. average

- Their incomes reflect their employment experience, ranging from a low median of \$39,800 among the newest households to approximately \$87,000 among established singles.
- Residents of the Solo Acts summary group segments are singles who prefer city life.
- Residents of this group tend to be well-educated, working professionals who are either attending college or already hold a degree.
- Solo Acts’ residents are moving into major cities such as New York City; Chicago; Washington, D.C.; Boston; Los Angeles; and San Francisco.
- With considerable discretionary income and few commitments, their lifestyle is urban, including the best of city life—dining out, attending plays and concerts, and visiting museums—and, for a break from constant connectivity, extensive travel domestically and abroad.

The following chart examines the LifeMode breakout of your Regional Profile – a five county region, including Santa Fe, Rio Arriba, Taos, Sandoval, and Bernalillo Counties.



Observations: The Regional Profile represents every LifeMode group. This is typical because of the larger population sample. The two highest concentrations are in the *Global Roots* and *Family Portrait* groups.

Top Regional LifeMode Groups: The U.S. average sits at 100.

Global Roots (14.2%) – Indexed 144 against the U.S. average

- Ethnic diversity is the common thread among the eight segments in *Global Roots*.
- *Las Casas* and *NeWest Residents* represent a strong Hispanic influence in addition to a broad mix of cultural and racial diversity found in *Urban Melting Pot* and *International Marketplace*.
- Residents are young, earn modest incomes, and tend to rent in multiunit buildings.
- Their youth reflects recent immigration trends; half of all households have immigrated to the United States within the past ten years.
- Married couples, usually with children; single parents; and people who live alone are typical.
- Spending is high for baby products, children’s clothing and toys.
- Residents are less likely than other groups to have home PCs but just as likely to use cell phones.

Family Portrait (14.2%) – Indexed 136 against the U.S. average

- Defined by youth, family and the presence of children
- The median age is less than 33 and median HHI is \$58,000+.
- The group is also ethnically diverse: more than 30 percent of the residents are of Hispanic descent.
- The neighborhoods are predominantly composed of homeowners who live in single-family homes.
- Most households include married couples with children who contribute to the group's large household size, averaging more than 3.1 persons per household.
- Their lifestyle reflects their youth and family orientation—buying infant and children's clothing and toys and visiting theme parks and zoos.

American Quilt (13.4%) – Indexed 157 against the U.S. average

- Live in small towns and rural areas and own modest houses.
- Work as skilled laborers in Manufacturing, agriculture, local government, service, construction, and farming industries.
- American Quilt includes the Rural Resort Dwellers segment, an older population that is retiring to seasonal vacation spots, and the Crossroads segment, a younger, family population that favors mobile homes.
- Households in American Quilt are also more affluent, with a median income of \$44,478, and more are homeowners.
- However, the rural lifestyle is also evident, with fishing and hunting (and power boats) and a preference for pickups and country music.

Upscale Avenues (12.6%) – Indexed 96 against the U.S. average

- See page 28 for full description.

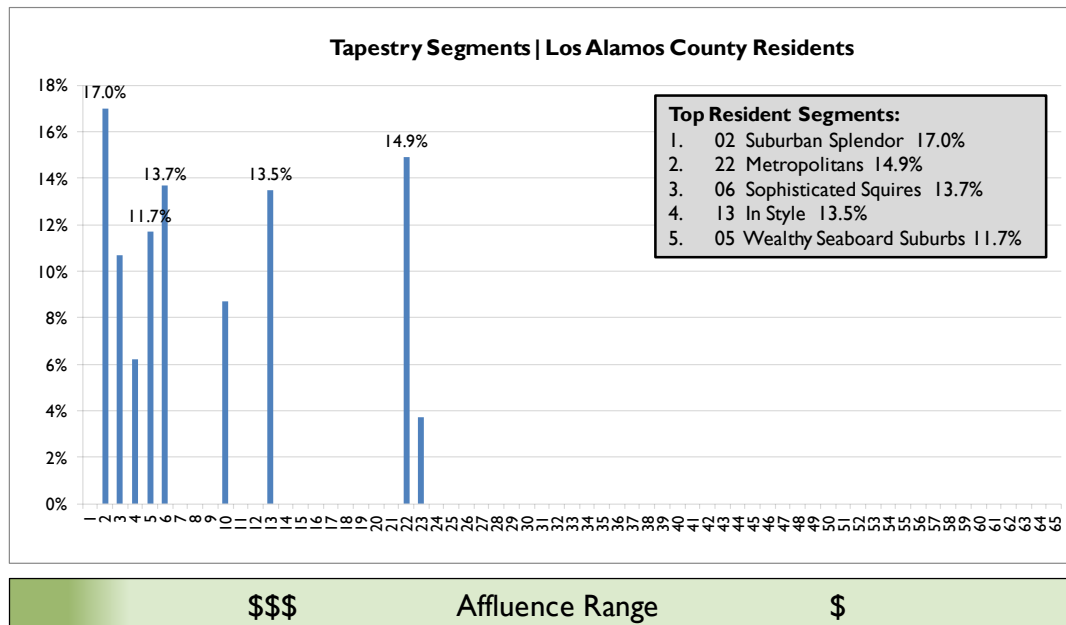
High Society (11.8%) – Indexed 87 against the U.S. average

- See page 27 for full description.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY TAPESTRY SEGMENTS

Community Tapestry Segments are the most distinct level of segmentation within the Tapestry System, dividing members of a population into 65 groups based on sociographic and demographic composition. Tapestry Segments take into consideration things like income, occupation, educational attainment, ethnic origin, household composition, marital / living arrangements, patterns of migration, mobility, communication and lifestyle and media patterns.

The chart below illustrates delivery within all the Segments for Los Alamos County residents. The Segments are organized by level of affluence – Segment One is the most affluent and Segment 65 is the least affluent Segment.



Observations: Los Alamos County residents display a fairly homogenous group of Segments, all to the left of the chart in the more affluent categories.

Top Resident Segment Descriptions: The U.S. average sits at 100.

02 Suburban Splendor (17.0%) – Indexed 908 against the U.S. average

- Maturing families, married with adolescent children and living in growing neighborhoods.
- Median age is 40 and median HHI is \$114,000.
- Homes feature the latest amenities and home design elements such as spas and hardwood flooring.
- Free time is devoted to family, travel and self-improvement pursuits such as physical fitness, reading, and visits to museums.
- Travel extensively domestically and internationally.
- Shop at high-end retailers such as Nordstrom, Lord & Taylor, etc.
- Technologically savvy and use the internet to check stocks and make purchases.

22 Metropolitans (14.9%) – Indexed 1,259 against the U.S. average

- Favor city living in older neighborhoods populated by singles or childless couples.
- Median age is 37 and median HHI is \$53,486.
- As owners of older houses, they have house maintenance and remodeling which they prefer to contract out. Same holds true with their lawn maintenance.
- Active, urban lifestyles; travel frequently; participate in yoga, backpacking and snorkeling; go to museums, zoos and rock concerts; rent foreign DVDs.
- Very civically active through participation in environmental causes and working for political parties.
- Own and use a laptop computer, preferably Apple, and go online daily to download music and buy books, etc.

06 Sophisticated Squires (13.7%) – Indexed 501 against the U.S. average

- Enjoy cultured country living in newer home developments on the fringe of urbanized areas.
- Mostly married-couple families; approximately 40% have children varying in age from toddler to over 18 years.
- Median age is 37 and median HHI is \$79,000.
- Sophisticated Squires drive SUV's and Minivan's. Cargo space is essential for the avid golfers and for DIY projects.
- Very health conscious; many own treadmills, join Weight Watchers, or take dietary supplements.
- They own all their own tools and supplies to complete lawn and household projects.
- Sophisticated Squires shop at suburban classics such as L.L. Bean, Lands' End and Eddie Bauer.

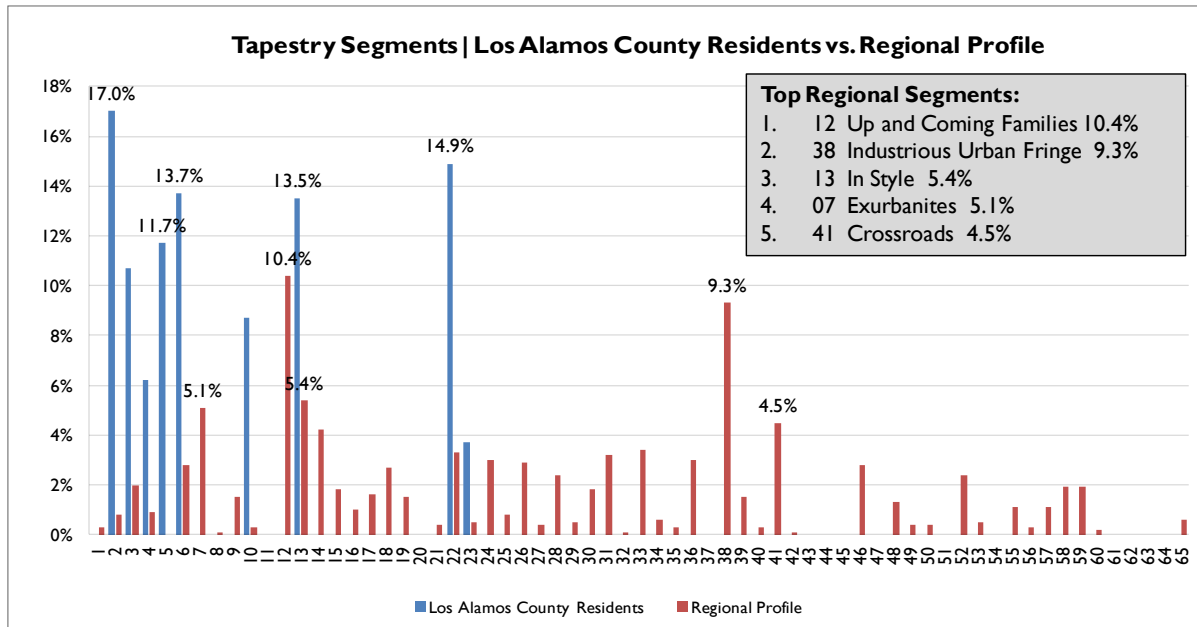
13 In Style (13.5%) – Indexed 633 against the U.S. average

- Professional couples who live in the suburbs but favor the lifestyle of city dwellers.
- Median age is 37.8 and median HHI is \$65,000+.
- Physical fitness is an integral part of their lifestyle with many participating in Weight Watchers and exercise programs.
- They enjoy dining out at The Cheesecake Factory and Chili's Grill and Bar, watching E! and the Golf Channel, traveling domestically, and going to rock concerts and live theater shows.

05 Wealthy Seaboard Suburbs (11.7%) – Indexed 759 against the U.S. average

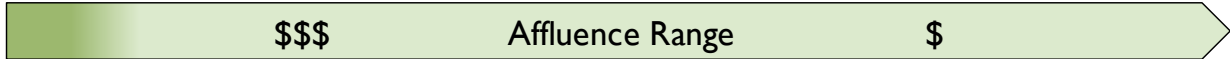
- Primarily living along the California and New England Coasts, these residents are married with no children.
- Median HHI is \$90,000+ and the typical resident is in their 40s.
- Diet more than exercise, but do enjoy going to the beach, sailing, and skiing.
- Travel frequently and shop at upscale retailers and use the Internet for convenience over entertainment.
- Television viewing is more limited, but favorite networks include A&E and Bravo along with movie and sports channels.
- Donate to charities and write to representatives, but are not activists.

The following chart examines the Segment breakout of your Regional Profile compared to residents.



Top Regional Segments:

- 12 Up and Coming Families 10.4%
- 38 Industrious Urban Fringe 9.3%
- 13 In Style 5.4%
- 07 Exurbanites 5.1%
- 41 Crossroads 4.5%



Observations: The Regional Profile represents a wider range of Segments than the Los Alamos County Profile. This is typical of a larger geographic area.

Top Regional Tapestry Segments: The U.S. average sits at 100.

12 Up and Coming Families (10.4%) – Indexed 222 against the U.S. average

- Young, affluent families with small children; own new single-family homes.
- 65% have attended college.
- Median age is < 32 and median HHI \$67,000.
- Fast food is a staple in the family diet. Leisure includes attending ball games, going to the zoo, etc.
- If these families travel, they only do so domestically.
- Since many are first time homeowners, they still purchase household basics.
- Up and Coming Families are starting or expanding their families so they purchase baby equipment, toys, etc.

38 Industrious Urban Fringe (9.3%) – Indexed 405 against the U.S. average

- Family is central; more than half of the households have children.
- Multigenerational households are relatively popular.
- Hispanics make up 57% of the residents. The median age, 29 years, is low because of the high number of children. The median HHI is \$39,000.
- They balance their budgets carefully. They shop at discount stores like Walmart, Kmart, and Target.

- Keeping in touch is a high priority, so they often have a second phone line and various phone services.
- They enjoy watching movies at home and at the theatre.

13 In Style (5.4%) – Indexed 256 against the U.S. average

- See page 32 for full description.

07 Exurbanites (5.1%) – Indexed 208 against the U.S. average

- Living beyond the urban fringe, Exurbanites prefer open space with affluence.
- Majority of residents are empty nesters, but the median age is 43. Median HHI is \$80,000+.
- Consult with financial planners and track investments on the Internet.
- Listen to public radio, donate to PBS, and remain active in their communities.
- Enjoy golf, boating, hiking, kayaking, vacations, and working on their homes and gardens.
- Practical shoppers favoring Old Navy, Target, and L.L. Bean.

41 Crossroads (4.5%) – Indexed 295 against the U.S. average

- Neighborhoods are growing communities in small towns in the South, Midwest, and West.
- Married couples with and without children and single parents are the primary household types.
- Median age is 33.6 and median HHI is \$37,185.
- Their priorities are their families and their cars – they undertake maintenance themselves.
- Enjoy watching TV, especially cartoon channels for the kids and fishing or NASCAR racing for the adults.
- Read automotive, boating, and motorcycle magazines more frequently than the newspaper. They like to fish and go to the movies. Shop at discount stores like Wal-Mart and Kmart.
- Have pets such as cats, dogs, and birds.

COMMUNITY TAPESTRY WHO REPORT | TOP TAPESTRY SEGMENTS

The charts below highlight the top Tapestry Segments for the Los Alamos County Resident Profile and for the Regional Profile. While the Regional Profile is represented in more segments, the two profiles only share two segments in common.

	Los Alamos County Residents		Regional Profile	
1	02 Suburban Splendor	17.0%	12 Up and Coming Families	10.4%
2	22 Metropolitans	14.9%	38 Industrious Urban Fringe	9.3%
3	06 Sophisticated Squires	13.7%	13 In Style	5.4%
4	13 In Style	13.5%	07 Exurbanites	5.1%
5	05 Wealthy Seaboard Suburbs	11.7%	41 Crossroads	4.5%
6	03 Connoisseurs	10.7%	14 Prosperous Empty Nesters	4.2%
7	10 Pleasant-Ville	8.7%	33 Midlife Junction	3.4%
8	04 Boomburbs	6.2%	22 Metropolitans	3.3%
9	23 Trendsetters	3.7%	31 Rural Resort Dwellers	3.2%
10			36 Old and Newcomers	3.0%

Observations:

- Los Alamos County residents and the Regional Profile only share two similar segments, indicating distinct differences in lifestyles between the two profiles. Efforts to please Los Alamos County residents may not speak to the region as a whole.
- Several affluent segments make up a significant percentage of Los Alamos County residents. The Regional Profile represents an older, less affluent population.

COMMUNITY TAPESTRY WHAT REPORT | UNDERSTANDING THE WHAT REPORT

The Los Alamos County Resident and Regional What Reports can be found in their entirety on the Research Report CD. The information below (and on the following pages) can be used as a guide to help you more fully understand the What Reports. When used correctly, this report will help you gain a much deeper understanding of the resident and regional populations and serve as a valuable tool for economic development.

We encourage you to familiarize yourself with the What Reports and challenge economic development entities to focus recruitment efforts on businesses frequented by populations with the same demographic composition as Los Alamos County.

As explained previously, the Tapestry What Report provides a detailed analysis of the audience under study for 37 separate Lifestyle and Media groups (see list below) in over 2,200 categories. Lifestyle and media groups are very broad (“Shopping”) while sub-categories are much more specific (“shopped at The Gap in the past 3 months”).

Complete list of all Tapestry Lifestyle and Media groups:

- Apparel
- Appliances
- Attitudes
- Automobiles
- Automotive/Aftermarket
- Baby Products
- Beverage/Alcohol
- Books
- Cameras
- Civic Activities
- Convenience Stores
- Electronics
- Financials
- Furniture
- Garden Lawn
- Grocery
- Health
- Home Improvement
- Insurance
- Internet
- Leisure
- Mail/Phone/Yellow Pages
- Watch
- Read
- Listen
- Personal Care
- Pets
- Restaurant
- Shopping
- Smoking
- Sports
- Telephone
- Tools
- Toys/Games
- Travel
- Video/DVDs
- Miscellaneous

COMMUNITY TAPESTRY WHAT REPORT | READING THE WHAT REPORT CHARTS

All categories are indexed against the national average of people who exhibit that certain lifestyle trait. An index of 100 is average, thus anything above an index of 100 is above average and anything below an index of 100 is below average. The sample below is pulled from the Los Alamos County Resident What Report and can help you understand this indexing system.

As an example, your residents index 510 in shopping at Stop 'N Shop within the last six months. This means your residents are 5.1 times more likely to shop at Stop 'N Shop than the U.S. average.

Economic development entities in your community can use this information as a sales tool to recruit potential businesses with cold hard numbers. Let's return to the Stop 'N Shop example: If Los Alamos County currently has a Stop 'N Shop operating within its county limits, you are satisfying your residents' desire to shop at this grocery store. However, if for some reason Los Alamos County is without a Stop 'N Shop, you can use this information to entice Stop 'N Shop to open a location within the county limits. Businesses will be more likely to partner with Los Alamos County if they are given data to support such a decision.

Grocery	Index
Shopped at grocery store/6 mo: Stop 'N Shop	510
Shopped at grocery store/6 mo: Pathmark	377
Shopped at grocery store/6 mo: Whole Foods Market	343
Bought coffee beans/6 mo: gourmet/specialty shop	266
Used 3+ pounds whole coffee beans in last 30 days	212



Note: The brands mentioned in the What Reports that follow may not be present in the Los Alamos County area. Although these national brands may not be present in the area, seeking similar brands will be beneficial.

COMMUNITY TAPESTRY WHAT REPORT | RESIDENT WHAT REPORT

Below you will find a summary of the What Report for Los Alamos County residents. The following pages contain selected charts that highlight some of your residents' key preferences. For all of the results from the Tapestry What Reports, refer to the Research Report CD.

Summary of Resident What Report

Higher income levels and interest in culture and travel influence preferences:

- **Grocery:** Residents are likely to shop at Stop 'N Shop, Pathmark, and Whole Foods Market.
- **Internet:** Residents are likely to use the Internet to trade/track investments, buy airline tickets, make travel plans, and order flowers.
- **Leisure:** Residents are likely to have gambled in Atlantic City, attended a classical music/opera performance, gone to a museum, or gone to a live theater in the last 12 months. They are also likely to be a member of a charitable organization.
- **Listen:** Residents are likely to listen to all news, public, classical, sports, and news/talk radio stations.
- **Read:** Residents are likely to read airline, travel, business/finance, and computer magazines. They are also likely to read the business/finance section of the newspaper.
- **Watch:** Residents are likely to watch The Office, Golf Channel, and CNBC.

Example charts from the Resident What Report

Grocery	Index
Shopped at grocery store/6 mo: Stop 'N Shop	510
Shopped at grocery store/6 mo: Pathmark	377
Shopped at grocery store/6 mo: Whole Foods Market	343
Bought coffee beans/6 mo: gourmet/specialty shop	266
Used 3+ pounds whole coffee beans in last 30 days	212



Internet	Index
Internet last 30 days: traded/tracked investments	307
Ordered on Internet/12 mo: airline ticket	306
Ordered on Internet/12 mo: flowers	297
Spent on Internet orders last 12 months: \$500+	287
Internet last 30 days: made travel plans	283



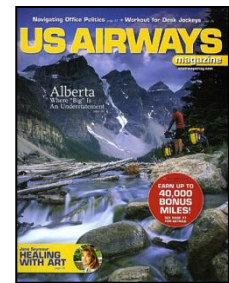
Leisure	Index
Gambled in Atlantic City in last 12 months	293
Attended classical music/opera performance/12 mo	273
Member of charitable organization	264
Went to museum in last 12 months	261
Went to live theater in last 12 months	247



Listen	Index
Radio format listen to: all news	501
Radio format listen to: public	344
Radio format listen to: classical	319
Radio format listen to: sports	296
Radio format listen to: news/talk	262



Read	Index
Read airline magazines	301
Read travel magazines	259
Read business/finance magazines	216
Read computer magazines	205
Read newspaper: business/finance section	201



Watch	Index
Watch TV aired once/wk: The Office	232
HH's cable/fiber optic co. offers Video on Demand	222
Watched last week: Golf Channel	221
HH has digital video recorder (DVR)	204
Watched last week: CNBC	184



COMMUNITY TAPESTRY WHAT REPORT | REGIONAL PROFILE WHAT REPORT

Below you will find a summary of the What Report for the Regional Profile. The following page contains selected charts that highlight some of the regional residents' key preferences. For all of the results from the Tapestry What Reports, refer to the Research Report CD.

Summary of Regional What Report

Higher income levels and cultural interests influence preferences:

- **Grocery:** The regional profile is likely to shop at Safeway, Publix, Albertson's, and Whole Foods Market.
- **Internet:** The regional profile is likely to use the Internet to order airline tickets, trade/track investments, make travel plans, and order flowers.
- **Leisure:** The regional profile is likely to have gambled at a casino six or more times, attended a classical music/opera performance, and attended horse races in the last 12 months. They are also likely to be members of charitable organization and veterans club.
- **Listen:** The regional profile is extremely likely to listen to Hispanic radio stations. They are also likely to listen to classical, golf, public, and news/talk radio.
- **Read:** The regional profile is likely to read airline, boating, and travel magazines. They are also likely to read the editorial and travel section of the newspaper.
- **Watch:** The regional profile is likely to watch Golf Channel, The Simpsons, NBC Meet the Press, Medium, and golf.

Example charts from the Regional What Report

Grocery	Index
Shopped at grocery store/6 mo: Safeway	169
Shopped at grocery store/6 mo: Publix	168
Shopped at grocery store/6 mo: Albertson`s	154
Shopped at grocery store/6 mo: Whole Foods Market	133
Used 3+ pounds whole coffee beans in last 30 days	129



Internet	Index
Ordered on Internet/12 mo: airline ticket	144
Internet last 30 days: traded/tracked investments	140
Internet last 30 days: made travel plans	133
Ordered on Internet/12 mo: flowers	133
Spent on Internet orders last 12 months: \$500+	133



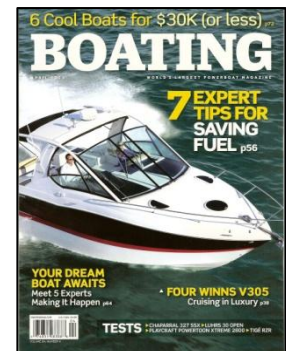
Leisure	Index
Gambled at casino 6+ times in last 12 months	151
Member of charitable organization	141
Attended classical music/opera performance/12 mo	140
Member of veterans club	140
Attended horse races in last 12 months	131



Listen	Index
Radio format listen to: Hispanic	336
Radio format listen to: classical	154
Radio listening: golf	145
Radio format listen to: public	144
Radio format listen to: news/talk	135



Read	Index
Read airline magazines	138
Read boating magazines	135
Read travel magazines	125
Read newspaper: editorial page	121
Read newspaper: travel section	121



Watch	Index
Watched last week: Golf Channel	148
Watch TV aired once/wk: The Simpsons	134
Watch TV aired once/wk: NBC Meet the Press	133
Watch TV aired once/wk: Medium	127
Watch on TV: golf	124



OUTSIDE PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight from individuals who live outside of Los Alamos County but commute to the area for work, or work outside of the Los Alamos County but have some familiarity with the area. Primarily the survey aims to collect the following types of information from respondents:

- Overall familiarity with the County and top-of-mind perceptions of Los Alamos County
- Outsider visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends and family)
- Overall perception of the business/economic development climate in the County
- Strengths, weaknesses, and opportunities of the business sector
- Reasons for living outside of Los Alamos County and motivators for considering relocation to the County
- Reasons for not considering Los Alamos County as a place to live in the future
- Measurements of Los Alamos County's quality of life indicators

Methodology & Results

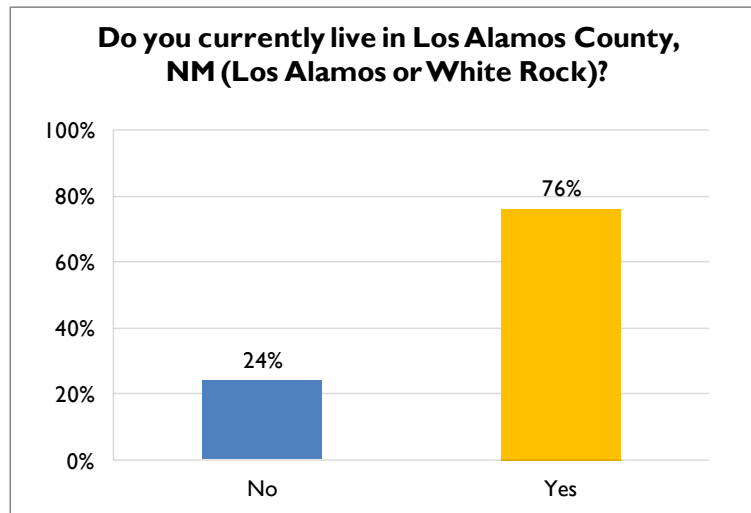
Representatives at Los Alamos County worked with local employers as well as regional and state level contacts to compile a comprehensive list of individuals to participate in the study. Local employers (including the Los Alamos National Lab) worked to provide Los Alamos County with a list of employees who live outside of the County but commute to the area for work. Regional and state level contacts were included in this list to increase the number of possible respondents. A total of 79 surveys were collected.

NOTE: The goal for this study was to collect 300 responses. Accessing employer databases and regional and state level contacts proved to be difficult for County representatives, thus the reason for the lower survey count. The majority of respondents to this survey were employees of the National Lab in the County, thus the results reflect these interests and perspectives.

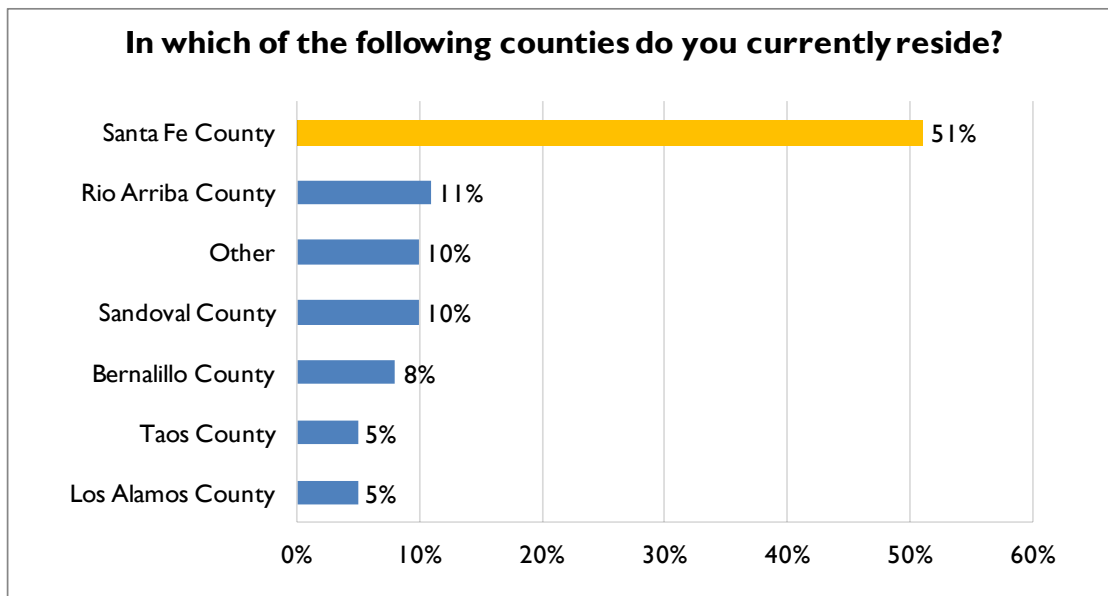
See **Appendix C** for unabridged Outside Perception Study results.

RESPONDENT DESCRIPTOR

- Living in Los Alamos County was the terminating factor for the survey.
- 249 respondents said they lived in Los Alamos County, and therefore were terminated from the survey.
- 79 responses were collected.

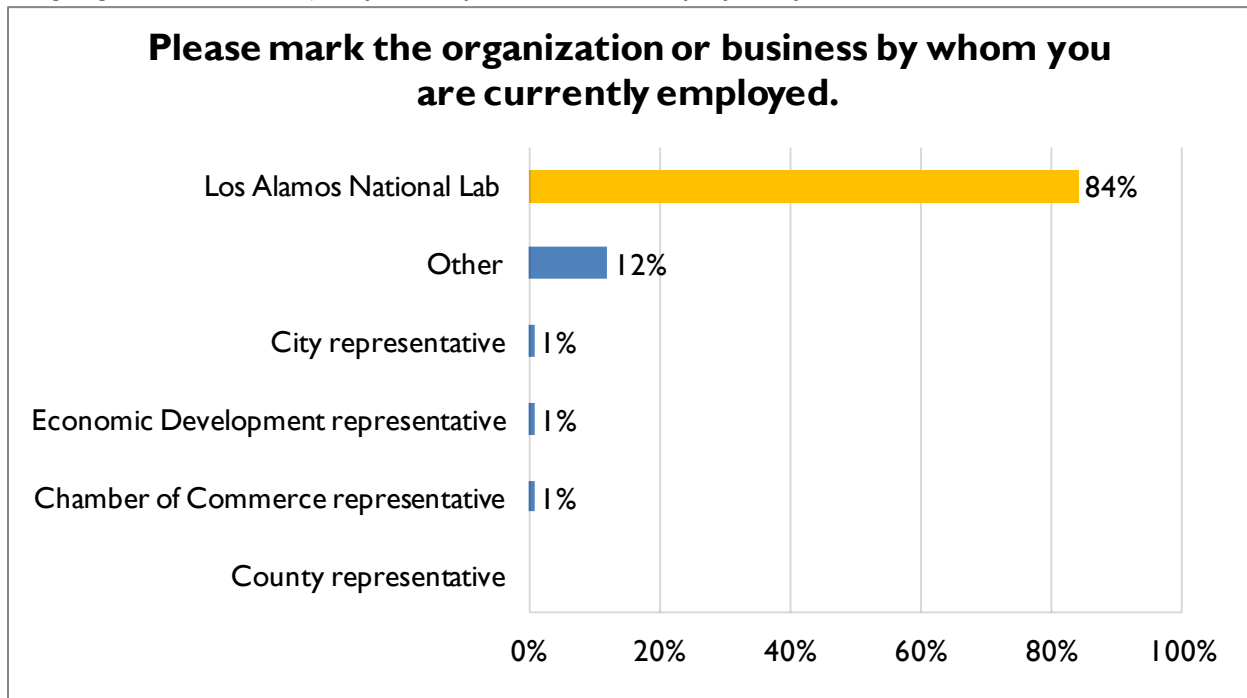


Note: If a respondent lives in Los Alamos County, they were terminated from the survey, leaving only outside perspectives.



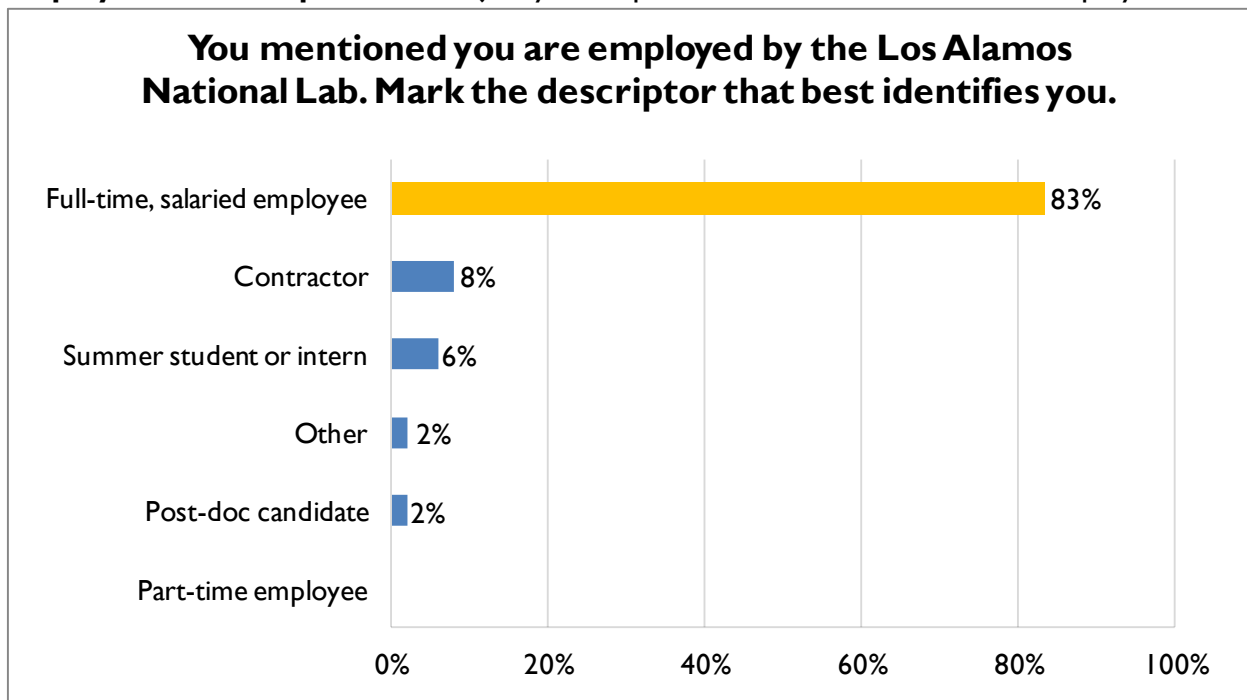
Other: Richland County, Jefferson County

Employment: The majority of respondents are employed by Los Alamos National Lab.



Other: Compa Industries, Inc., NSA, subcontractor, consultant

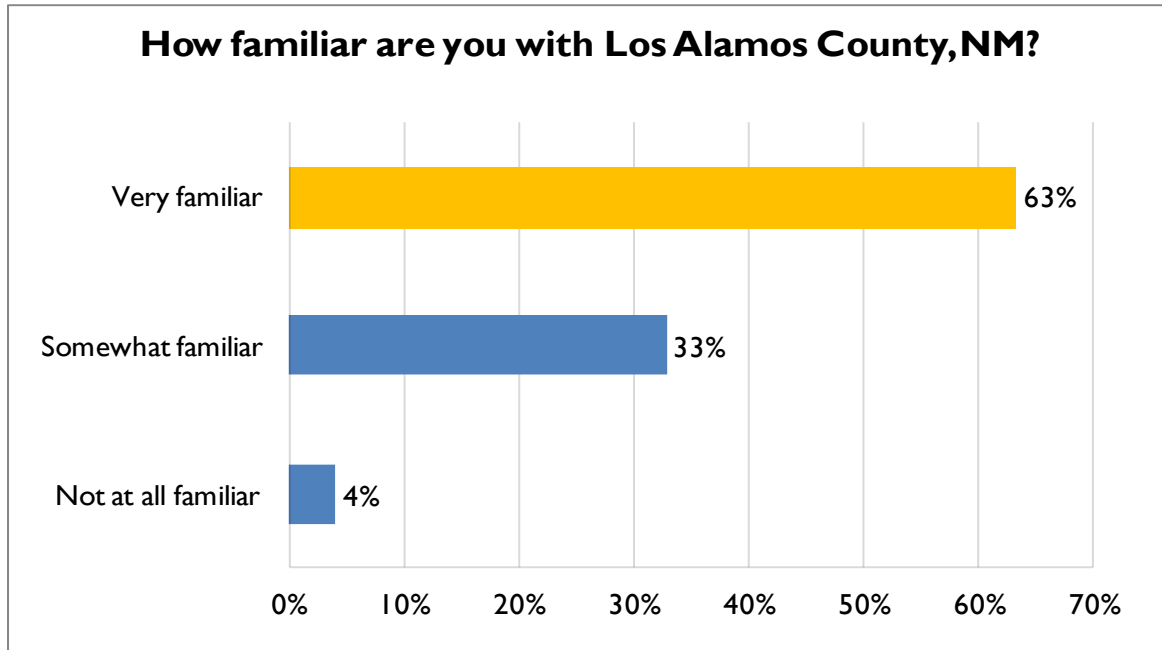
Employment Descriptor: The majority of respondents are full-time, salaried employees.



Other: Full time student

RESPONDENT FAMILIARITY

If a respondent was not at all familiar with Los Alamos County, they were terminated from the survey.

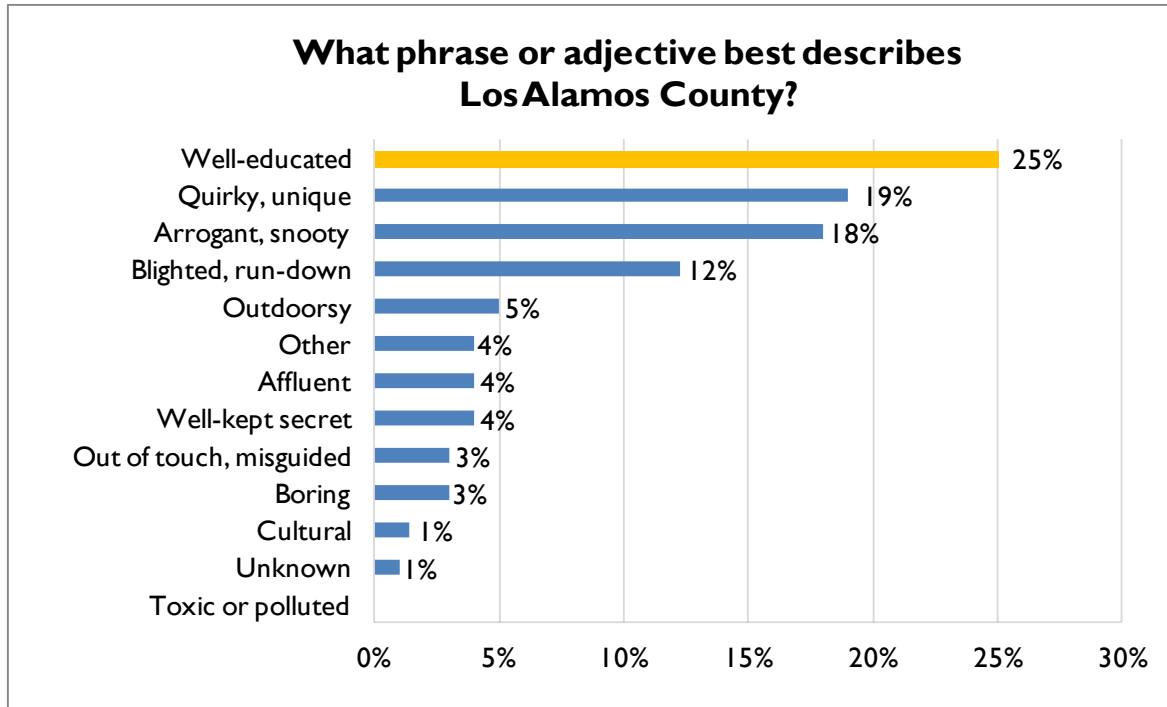


TOP OF MIND PERCEPTION

When you first think of Los Alamos County, NM, what comes to mind?

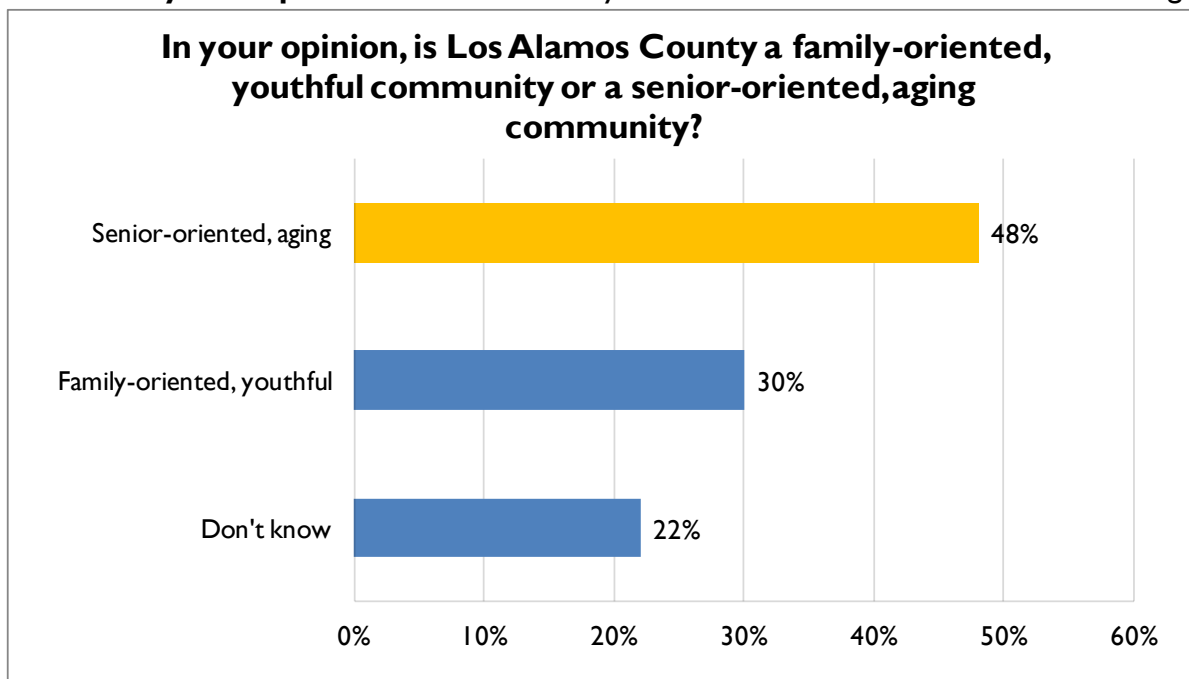
- Los Alamos National Laboratory
- Outdoor recreation

Descriptions: Reiterating community perspectives, the top adjectives are educated and quirky.



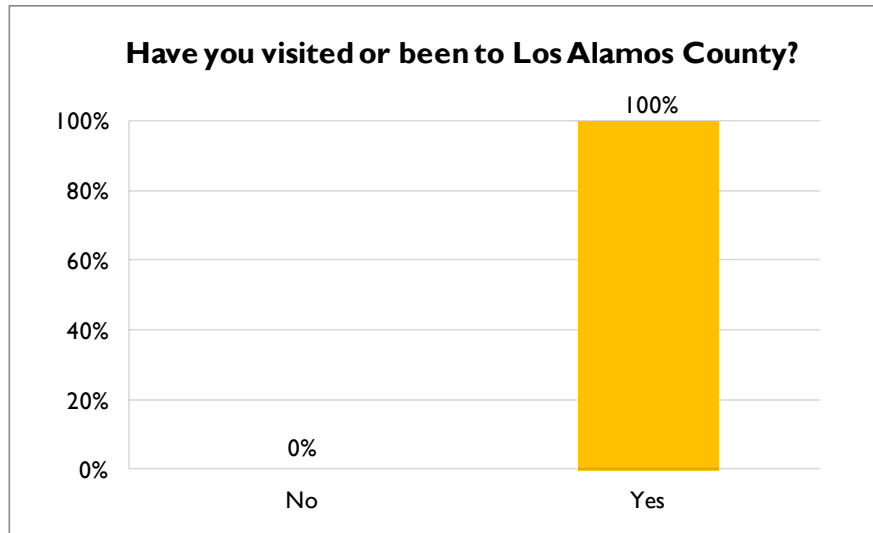
Other: Small town, family community, isolated

Community descriptor: Los Alamos County is best described as senior-oriented and aging.



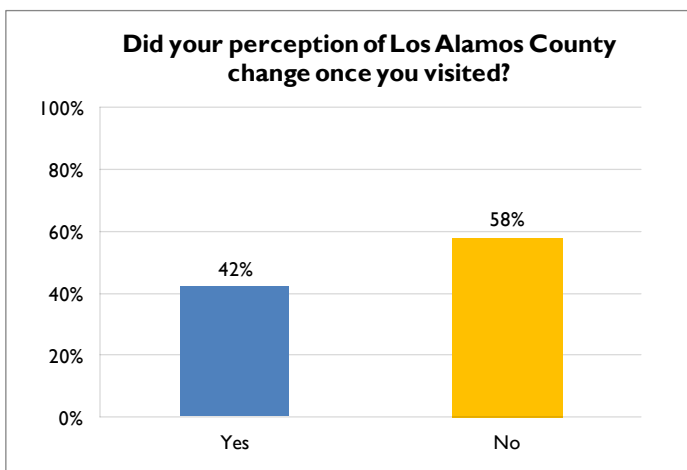
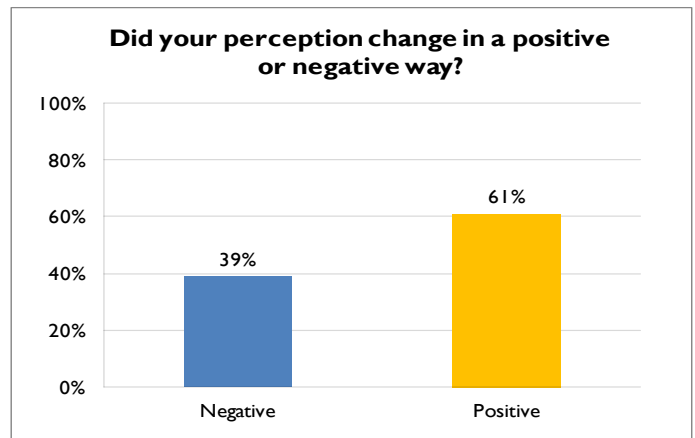
VISITATION

If a respondent said they had visited the County, they were asked a series of visitation questions. Because the majority of respondents of this survey work at the Lab, a 100% visitation rate was given, meaning most everyone travels to Los Alamos County for work.



What was your perception of Los Alamos County before you visited?

- *“My only thoughts of Los Alamos were tied to the Lab and radiation.”*
- *“Unique, beautiful outdoor scenery where exciting scientific discoveries are made.”*

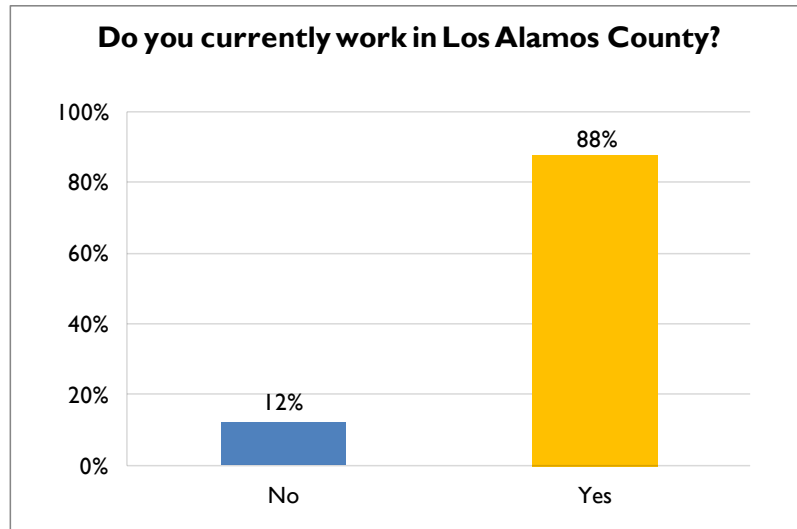


What changed your perception?

- *“I was surprised to find the town was so close to the mountains and national forest; very easy to drive a short distance to the mountains.”*
- *“Diversity and tolerance are great human qualities where fostered and Los Alamos County is rich in both.”*
- *“There’s a surprising lack of commerce in the County.”*

EMPLOYMENT

If a respondent said they currently work in the County, they were asked a series of business-related questions.



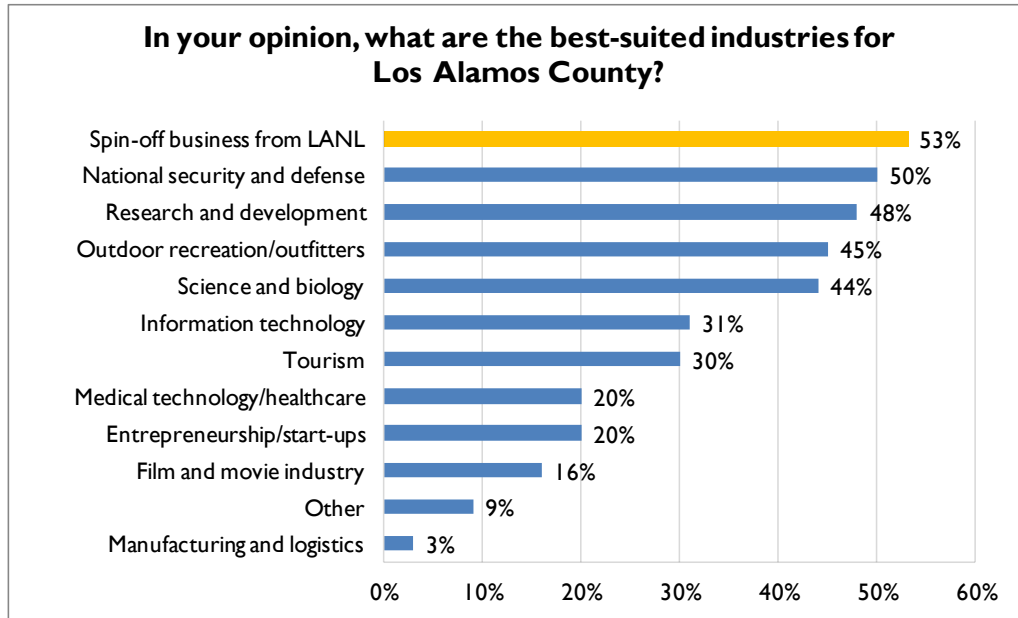
Why do you prefer to live outside of Los Alamos County and commute to the County for work?

- It's expensive
 - *"Los Alamos is expensive to live in and I have to leave in order to buy anything."*
- Lack of entertainment amenities
 - *"I prefer to have a more city environment to live in - shopping and eating choices and places that don't close down at 8:00 PM and on weekends."*
- Unfriendly culture
 - *"The people who live here are self-absorbed, uncommunicative and unfriendly."*
 - *"I prefer a more inclusive and open community."*

In your own words, describe the culture of the business community in Los Alamos County.

- It is centrally-focused on the Lab
 - *"I see the business community as existing to serve the laboratory or its employees. I have a hard time believing there is even a single business inside of Los Alamos County that could be viable without these demographics present."*
 - *"Mostly lab based. Everything else is there to address the basic needs of the locals."*
- It is struggling
 - *"Only a few own the business side of Los Alamos County so there is no growth."*
 - *"It's struggling to make it; it's not able to reinvest to grow."*
- It is an independent culture
 - *"The business is focused on government funding, especially nuclear. Little concept of business outside of that context."*

Best-suited industries: Spin-off businesses from LANL are the best-suited industries for Los Alamos County although capturing this tech-transfer was seen as a challenge in In-Market conversations.



Other: White collar jobs, retirement industries, restaurants

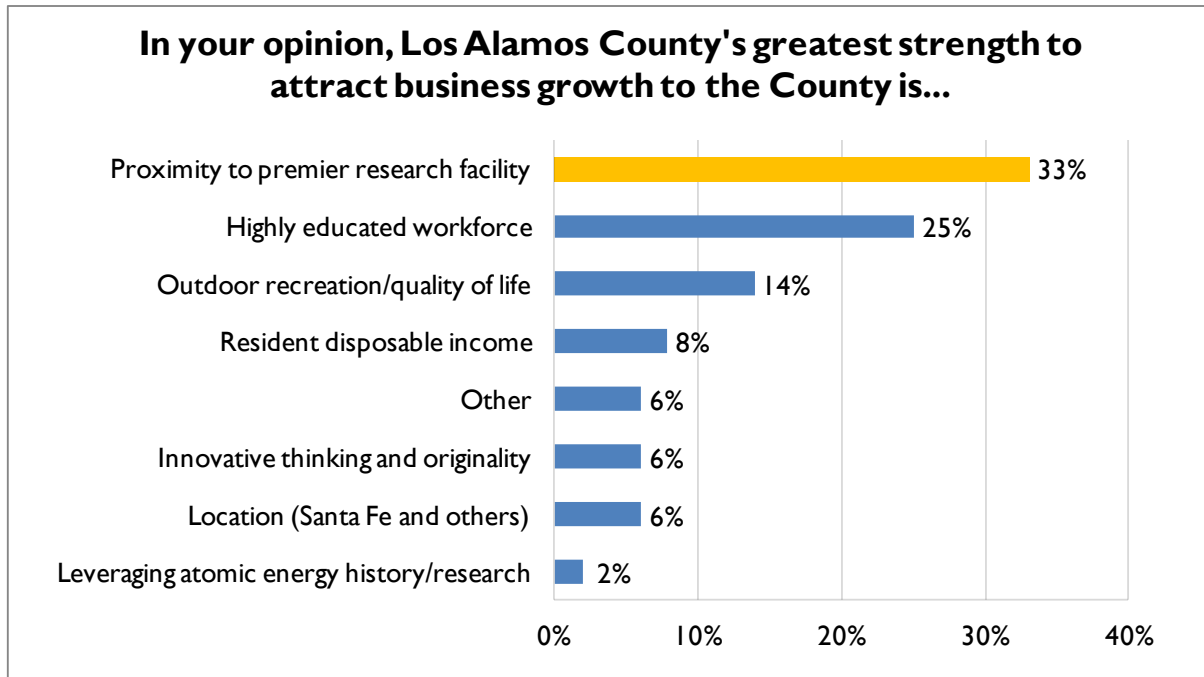
Los Alamos County should START doing what to attract additional economic development and business growth to the community.

- Encouraging new businesses
 - *"We need more fair and equitable new business propositions."*
 - *"Develop less reliance on the Los Alamos National Lab to pay rent and taxes, and lower the rent so small businesses that want a chance to get started here can."*
- Fostering affordability
 - *"Offer financial incentives for small businesses and incentives for landlords to fix rental spaces."*
- Bringing in entertainment amenities
 - *"Bring in more events with an appeal to younger members of the community."*
 - *"Encourage more entertainment options."*

Los Alamos County should STOP doing what to attract additional economic development and business growth to the community.

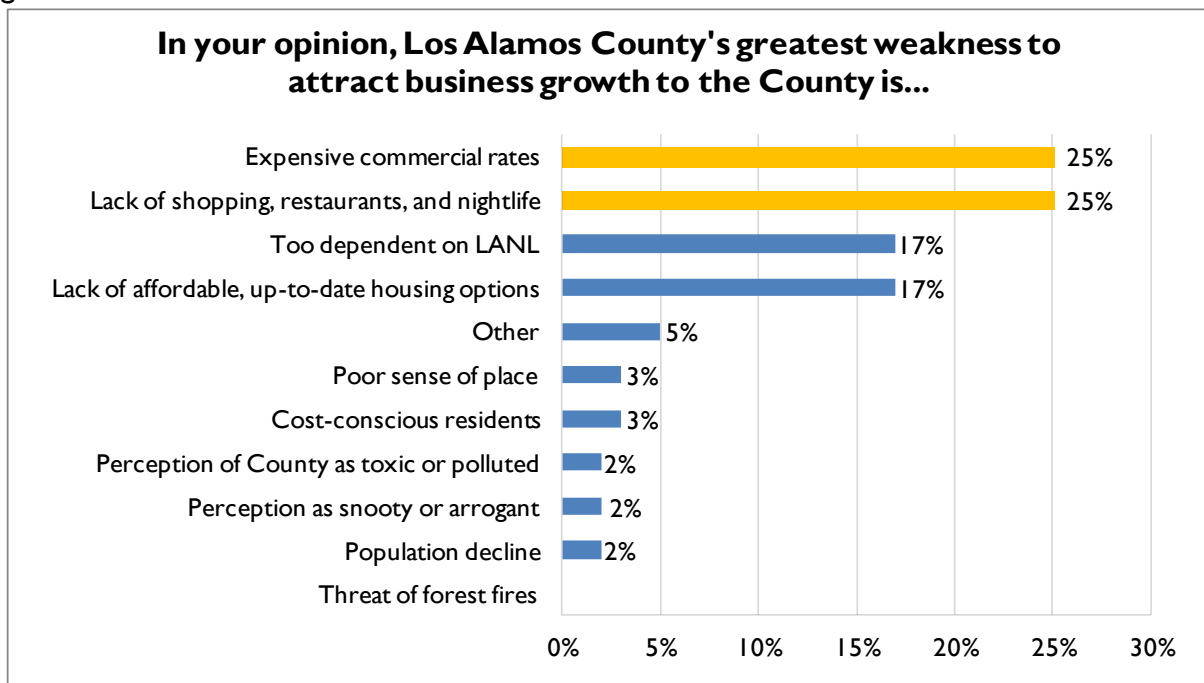
- Relying on Los Alamos National Laboratory
 - *"Planning under an assumption that the Los Alamos National Laboratory will be a prime economic generator in Northern New Mexico."*
 - *"Relying on the National Laboratory to pay high rent on leased space."*
- I don't know
- Discouraging business
 - *"Preventing reasonable growth opportunities."*
 - *"Allowing current businesses to dictate which businesses should come to town."*

Ability to attract business: Access to a premier scientific research facility as well as highly educated talent are top strengths and interests for economic development perspectives.



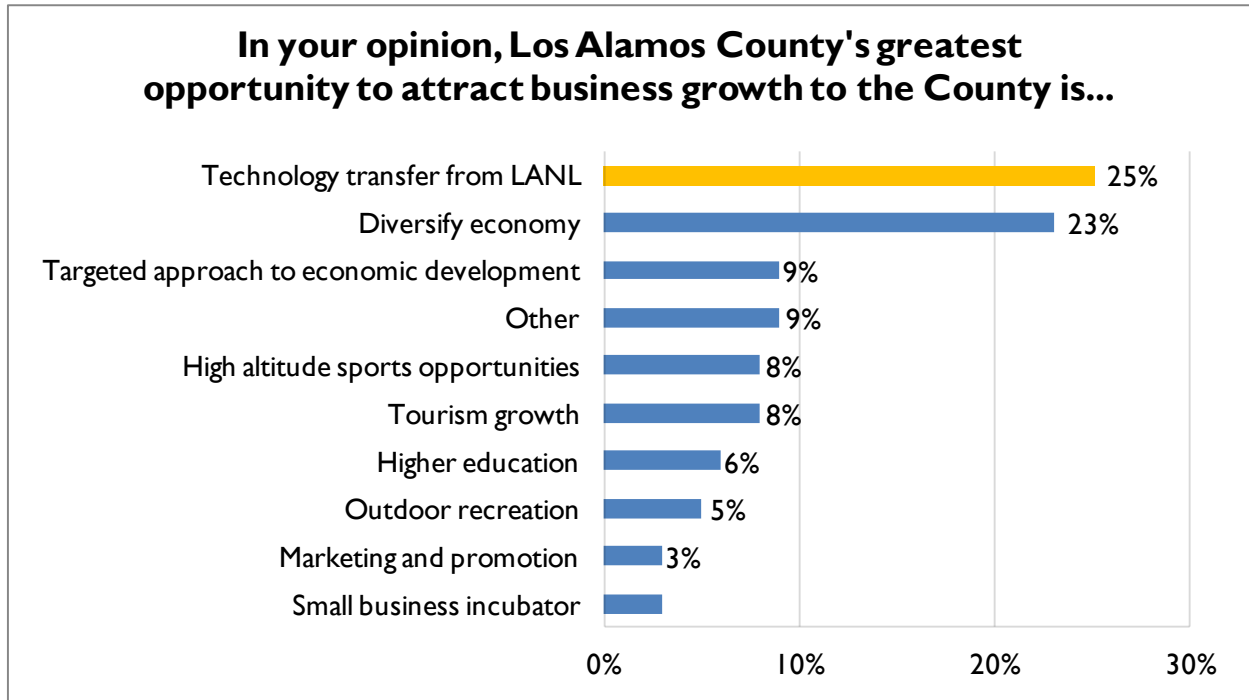
Other: Well-run government, lack of competition

Weakness to attracting business: Expensive commercial rates and lack of shopping, restaurants, and nightlife is Los Alamos County's greatest weakness in attracting business growth.



Other: County government interference, lack of entrepreneurial spirit/risk taking

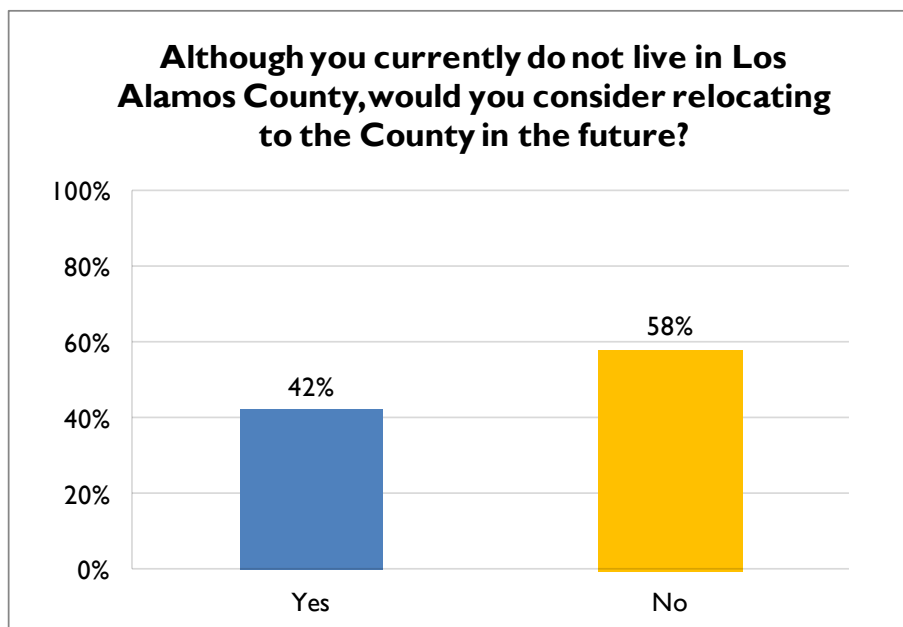
Opportunity for attracting business: Technology transfer from LANL is Los Alamos County's greatest opportunity for business growth. Also, this type of business is seen as the best-suited business as well.



Other: Real estate cost, daily growth of commuter population

RELOCATION

If a respondent mentioned they lived outside of Los Alamos County, a series of questions were asked to get a greater understanding of relocation interests.



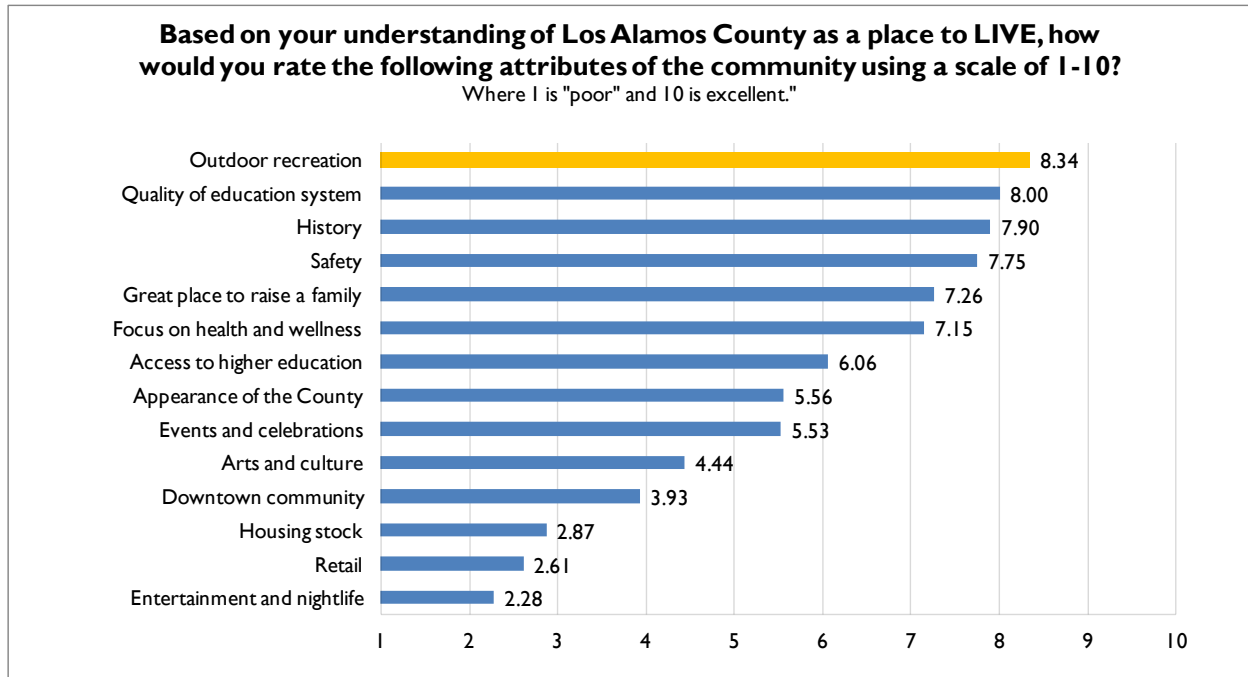
You mentioned you **WOULD consider relocating to Los Alamos County. What interests you about Los Alamos County that would make you consider relocating there?**

- Close to work and proximity to the Lab
 - *"The proximity to my job would make me consider relocating. It's a shorter, safer commute."*
- It is a family-oriented community
 - *"It's a good, safe community to raise children."*
- The outdoor recreation
 - *"Just the outdoor life – the mountains, for example."*
 - *"I'd move back for the good running trails."*

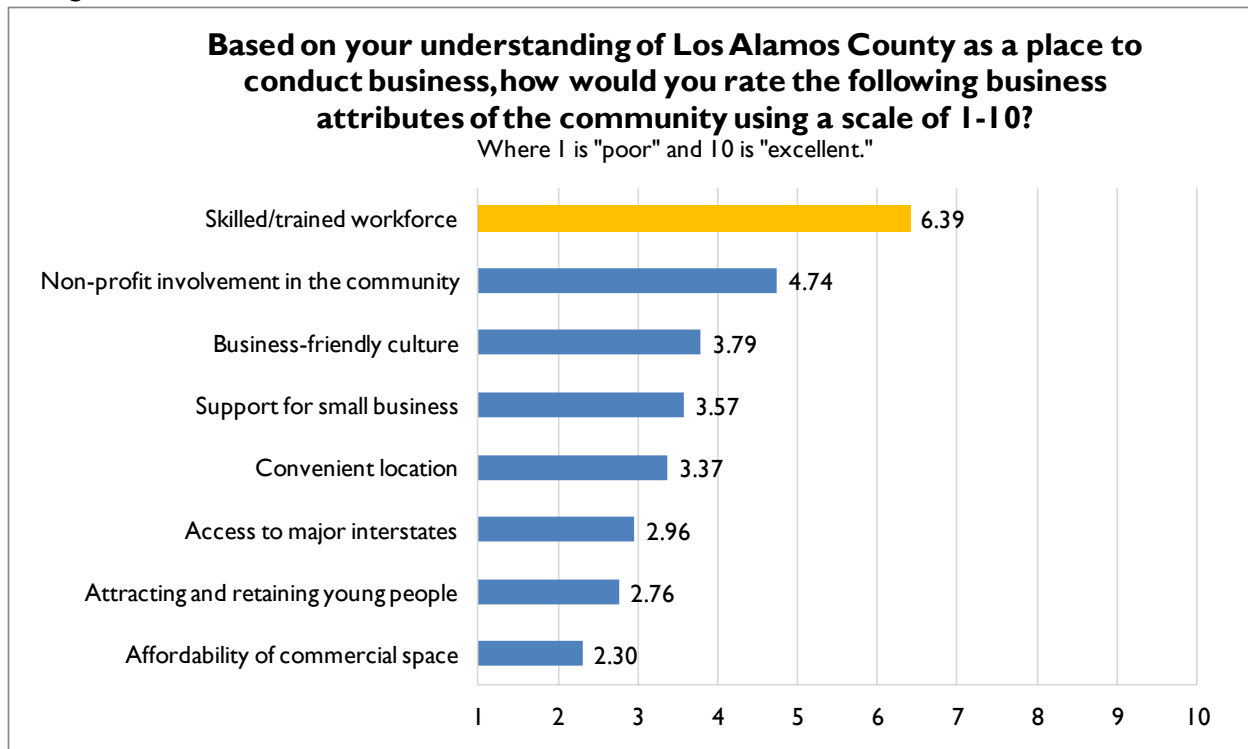
You mentioned you **WOULD NOT consider relocating to Los Alamos County. What detracts you from considering Los Alamos County as a place to live in the future?**

- Cost of living
 - *"It's too expensive – if not impossible – to purchase modern housing on a decent-sized lot in Los Alamos County."*
 - *"There is a limited and expensive real estate market."*
- Lack of amenities
 - *"There's nothing interesting to do culturally."*
 - *"The lack of restaurants, shopping, and cultural activities."*
- Too small
 - *"I don't see Los Alamos County ever having a bigger city vibe that's more my speed."*
 - *"Los Alamos County is too small for my liking."*

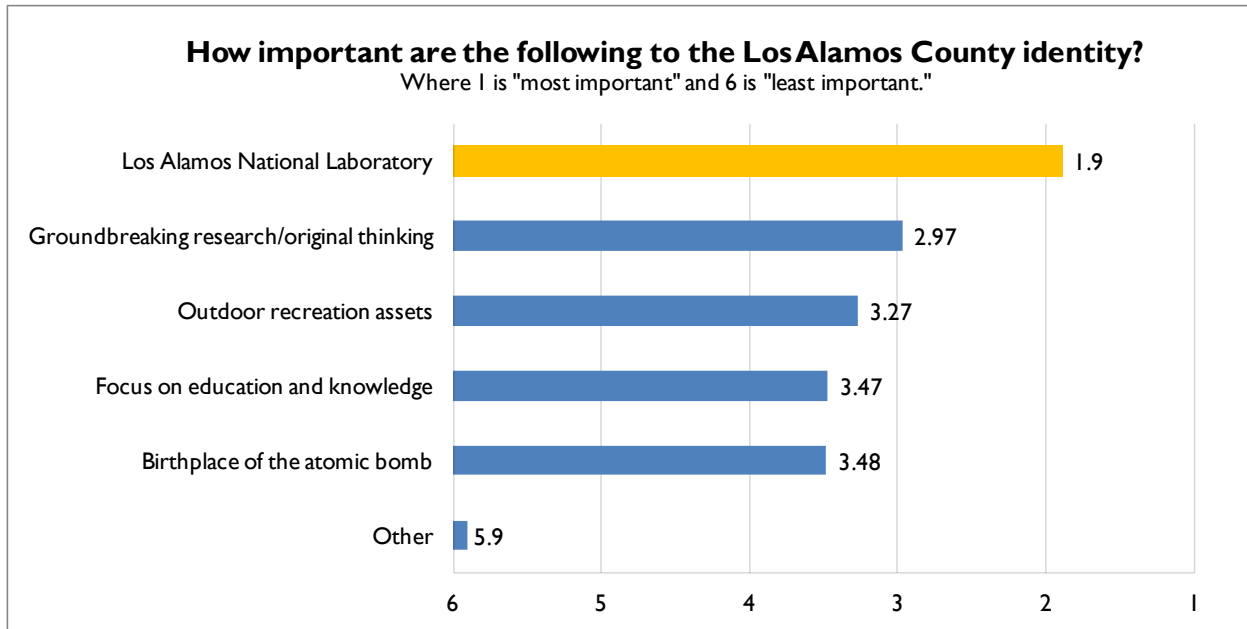
Community attributes: To further reiterate the great quality of life in Los Alamos County, outdoor recreation and quality education were top rated attributes.



Business attributes: Business attribute scores were lower compared to community attributes. This reveals an opportunity to inform your constituents about additional business strengths of the area.



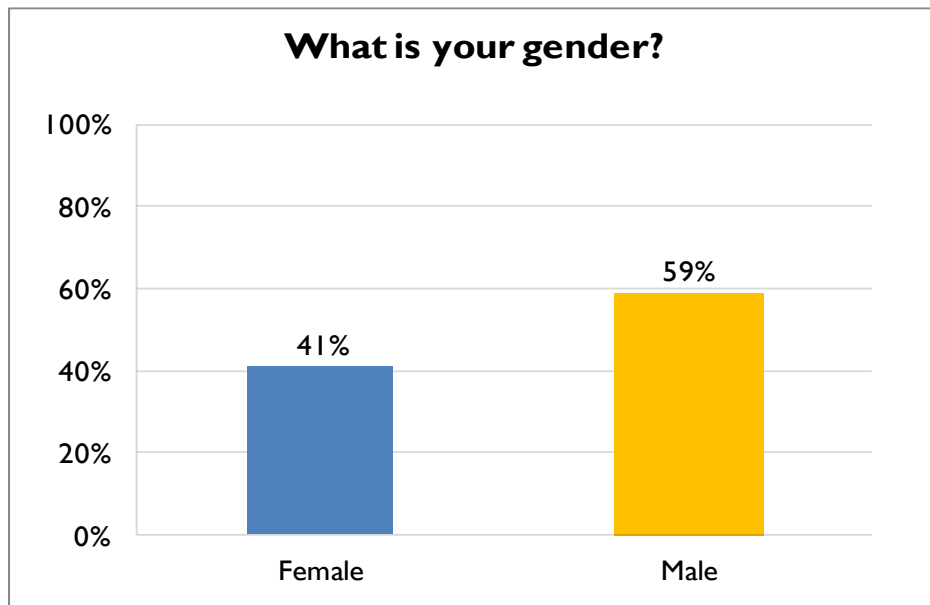
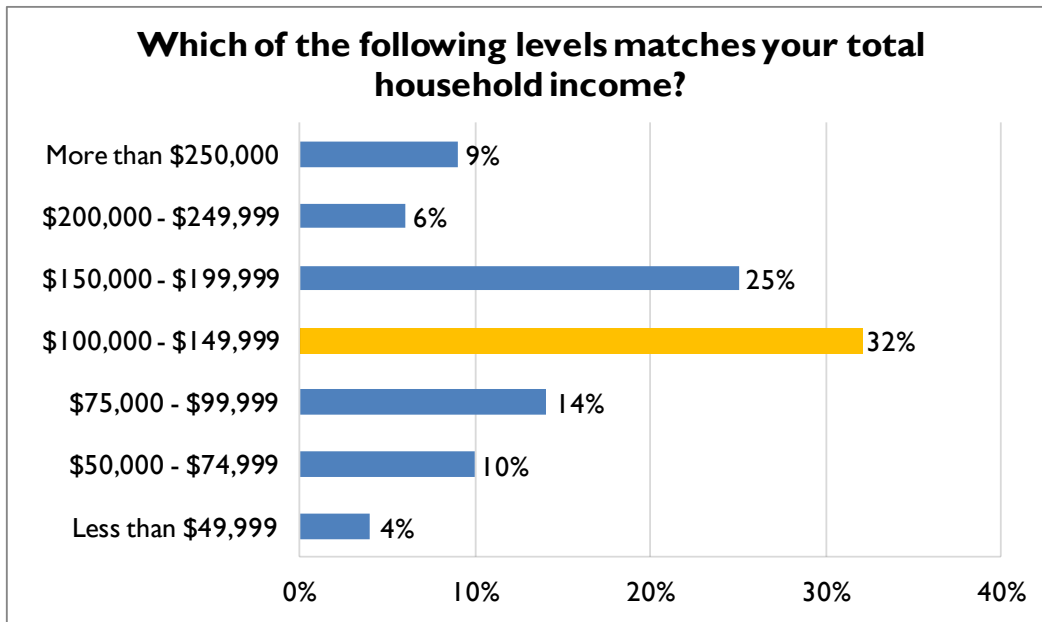
County identity: Los Alamos National Laboratory is the most important aspect of the Los Alamos County identity – a natural choice given the majority of respondents work at the Lab.



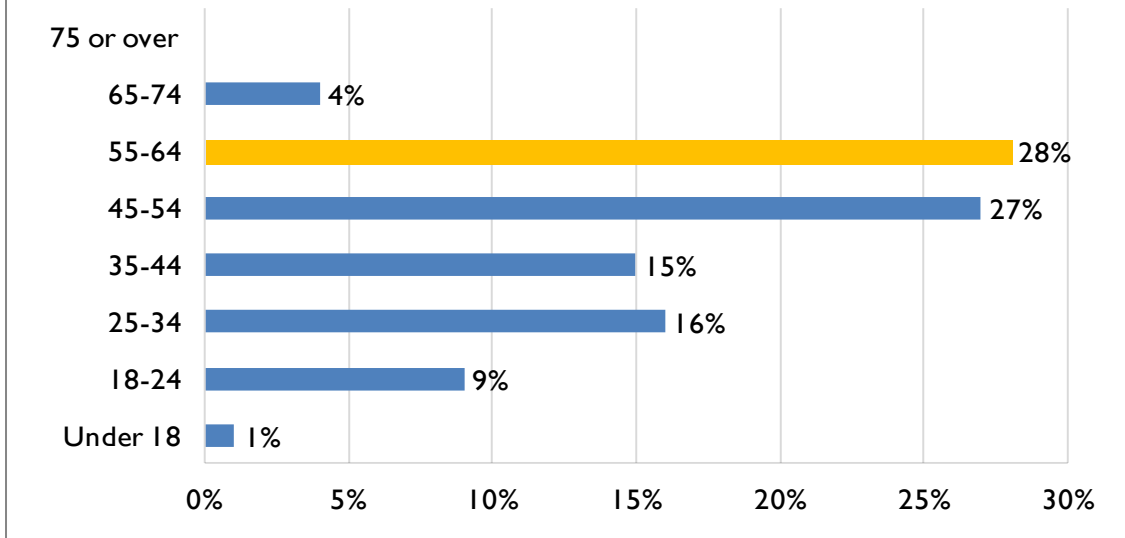
In your opinion, how can Los Alamos County improve its reputation and increase awareness in Northern New Mexico and across the state?

- Diversify the economy
 - *“Highlight the potential to tap into a market that's largely under populated with quality small businesses. The growth potential for a quality business is high.”*
 - *“Successfully launch at least one high tech company from a tech transfer that grows to greater than 100 employees in northern New Mexico.”*
- Positive advertising and marketing
 - *“Advertise the beauty and diversity.”*
 - *“Create more positive news articles on LANL research; this is slowly changing, but needs to happen more.”*
- Become more inclusive
 - *“There should be more contact and collaboration with neighbors.”*
 - *“Continue to work with Northern NM communities on economic development that benefits the region and not solely Los Alamos County.”*

DEMOGRAPHICS



Which of the following includes your age?



CONSUMER AWARENESS AND PERCEPTION STUDY (CAP STUDY)

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation, and perceptions of the Santa Fe, NM MSA and Albuquerque, NM MSA. The survey measures:

- Overall top-of-mind perceptions of Los Alamos County and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends and family)
- Strengths and weaknesses of Los Alamos County with identified community attributes
- Measurements of Los Alamos County quality of life indicators
- Measurement of Los Alamos County strengths and weaknesses as a place to do business

Methodology & Results

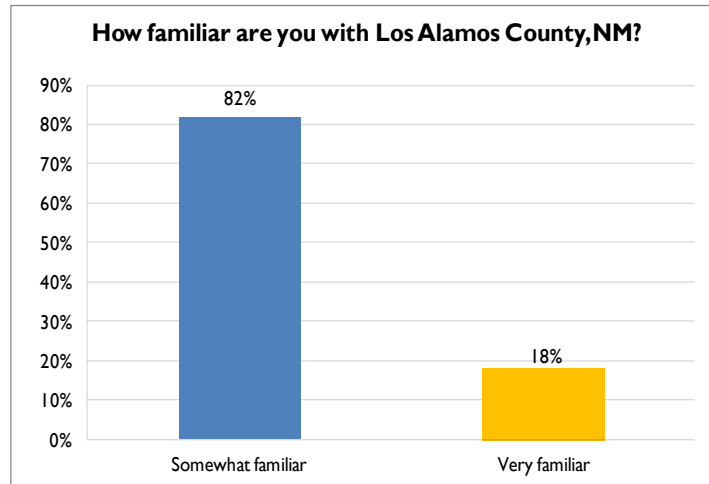
An internet study was conducted among respondents in the Santa Fe MSA (105 responses) and Albuquerque MSA (105 responses). A total of 210 surveys were collected, allowing for a margin of error of +/- 6.76 at the 95% confidence level.

See **Appendix B** for unabridged CAP Study results.

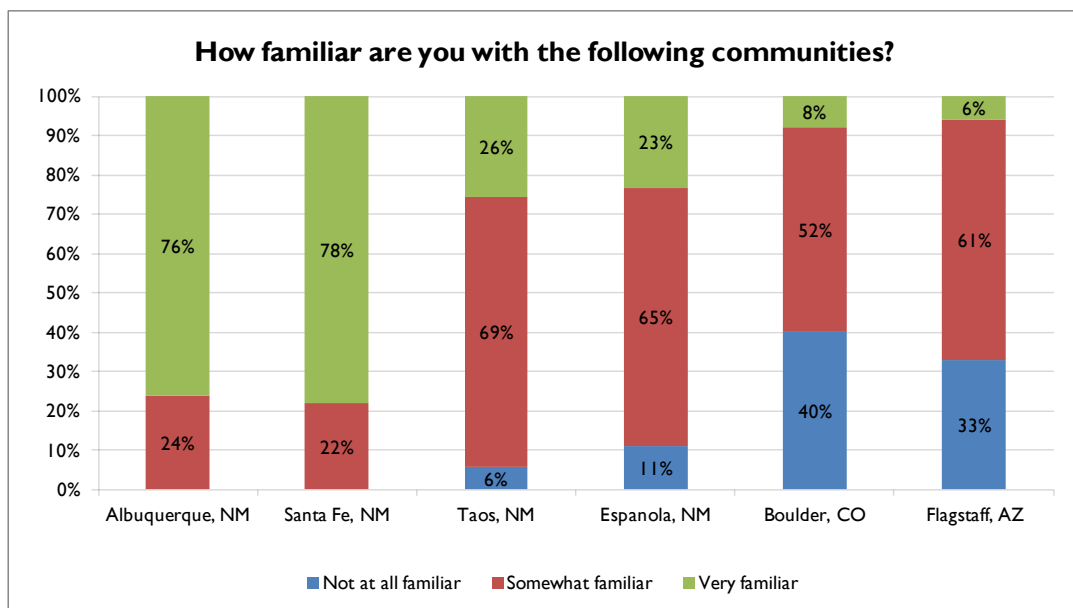
FAMILIARITY WITH LOS ALAMOS COUNTY

How familiar are you with Los Alamos County, NM?

- Lack of familiarity was the terminating factor for the survey.
- 126 respondents were not at all familiar with Los Alamos County, and therefore were terminated from the survey.
- The termination rate was 40%, which is average.
- Of those not terminated, 82% were somewhat familiar and 18% were very familiar (after termination for lack of familiarity).
- 210 responses were collected for the CAP Study.



NEIGHBORING COMMUNITY FAMILIARITY



When you think of the following communities, what comes to mind?

LOS ALAMOS COUNTY

- Laboratory / science
- Intelligence / education
- Quaint / quirky

ALBUQUERQUE

- Metropolitan
- Balloon fiesta
- Home/residential

TAOS

- Art
- Skiing
- Pueblo

FLAGSTAFF

- Grand Canyon
- Mountains
- Weather / snow

SANTA FE

- Art / culture
- Capitol
- Home

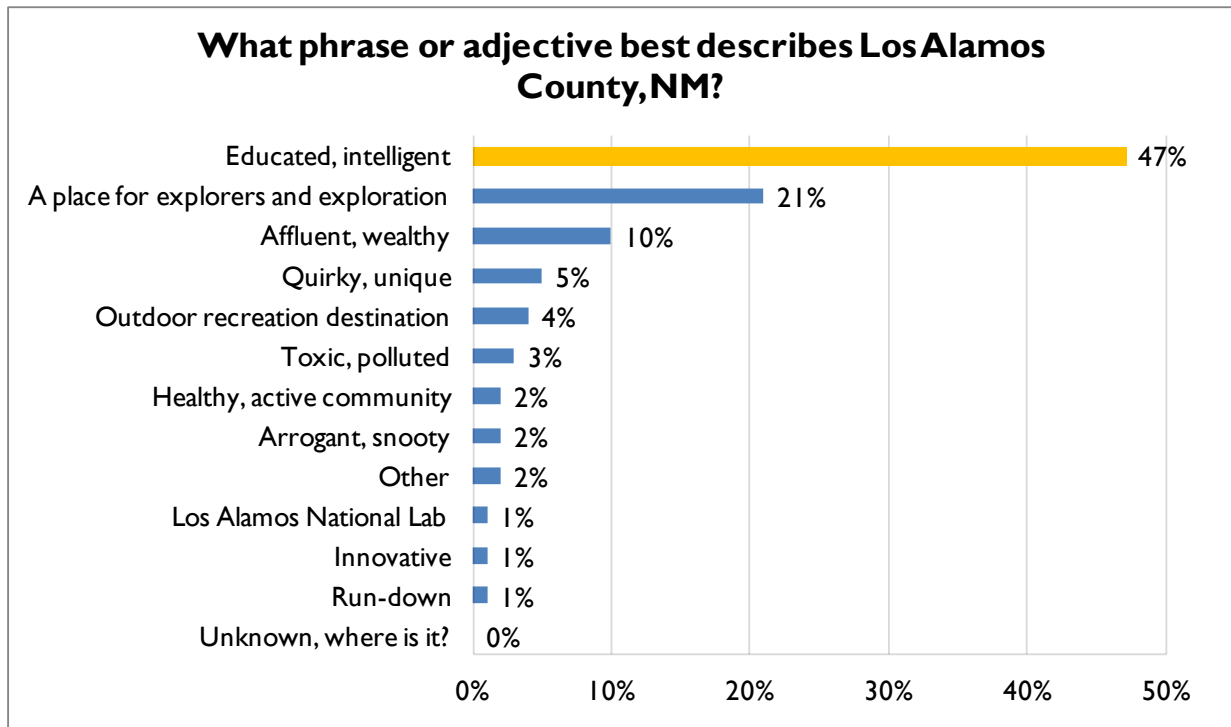
BOULDER

- University
- Mountains

ESPANOLA

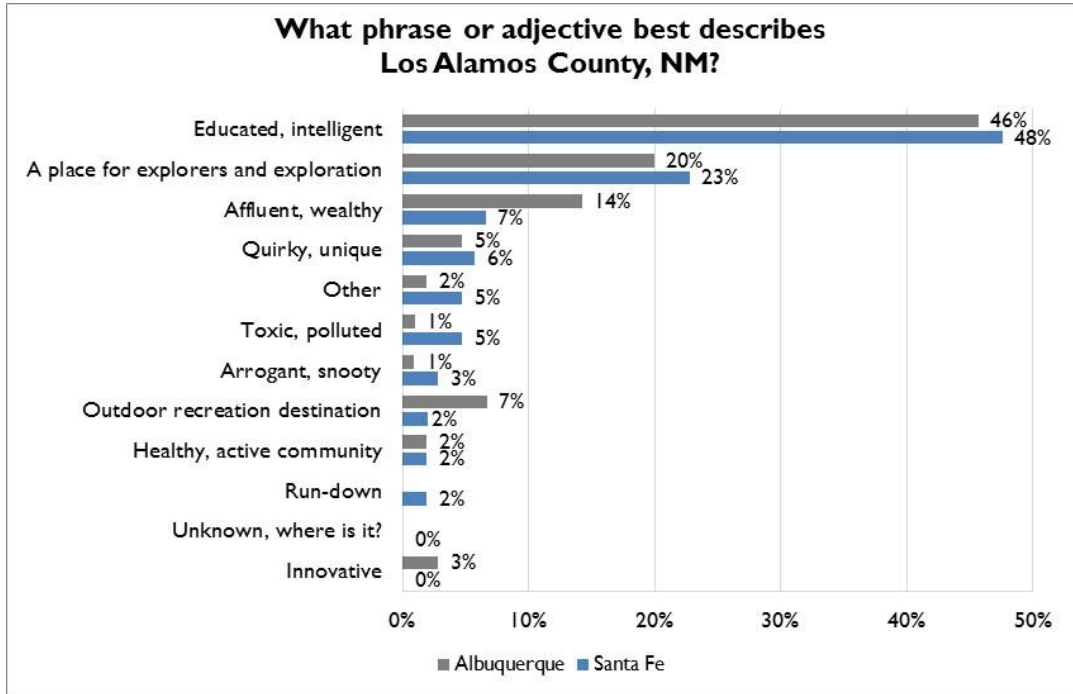
- Low Riders
- Drugs/crime

Adjective: Outsiders seemingly connect the presence of the National Lab and outstanding schools as a primary reason for the educated, intelligent community.

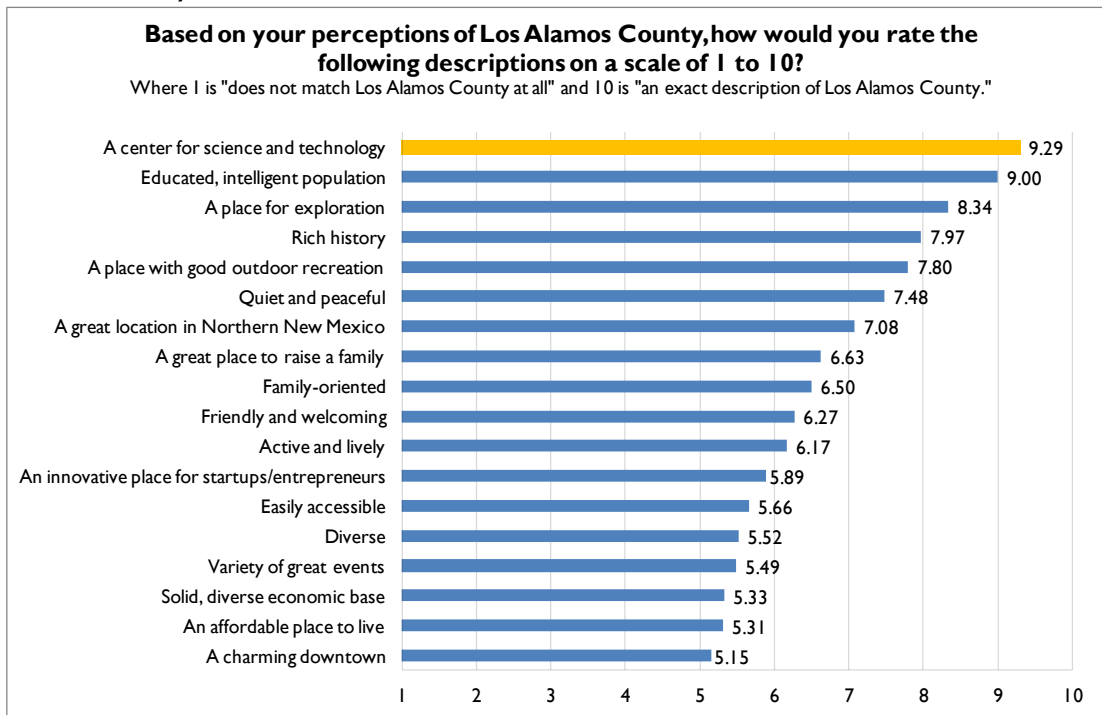


Other: Vital in national defense, military control

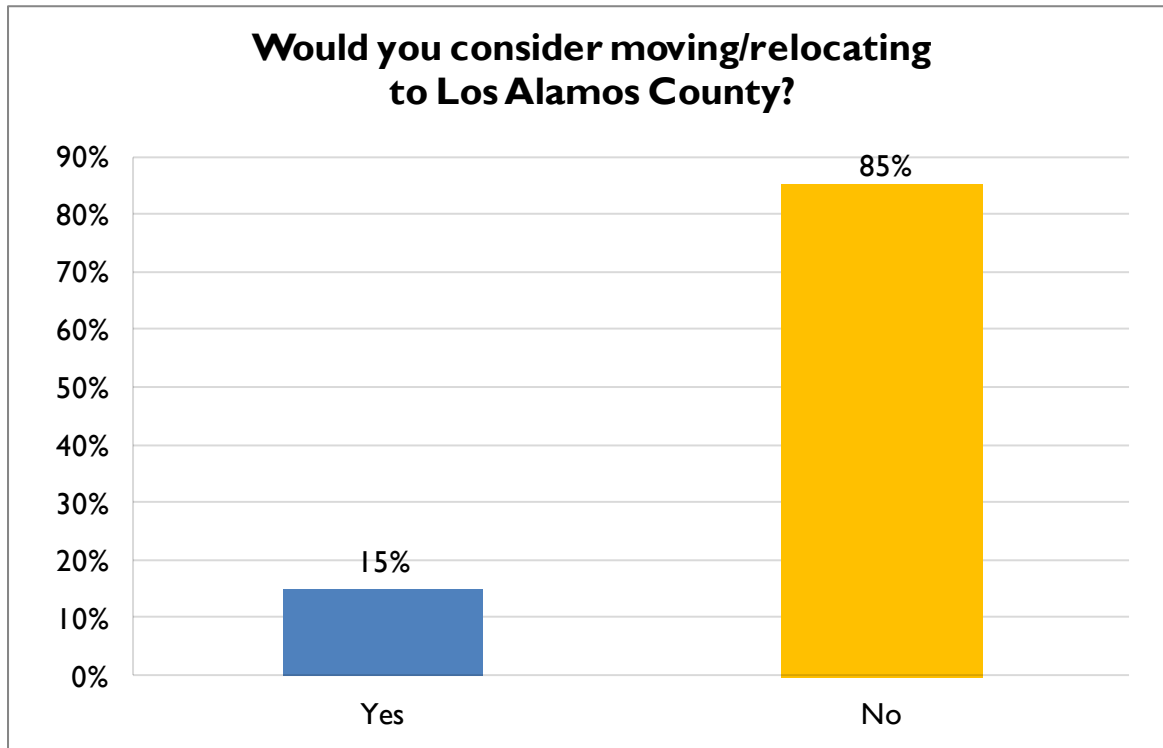
Adjective by Market: Those from Albuquerque are more likely to describe you as affluent over a place with outdoor recreation. Santa Fe respondents more closely associate Los Alamos County with the science assets and community.



Description rating: A center for science and technology is the highest rated description for Los Alamos County.



Relocation: The majority of respondents would not consider relocating to Los Alamos County.



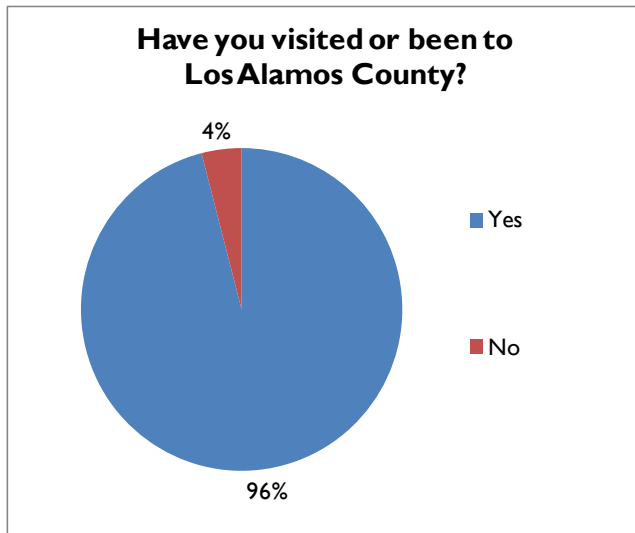
Why WOULD you consider moving/relocating to Los Alamos County?

- *“I lived there for 30 years and enjoyed it a lot. It’s great to be 15 minutes from the ski hill and two minutes from the forest.”*
- *“It would be nice to be surrounded by so many scientists.”*
- *“The people, outdoor activities, education opportunities, minimal civic problems, safety, and comfort.”*

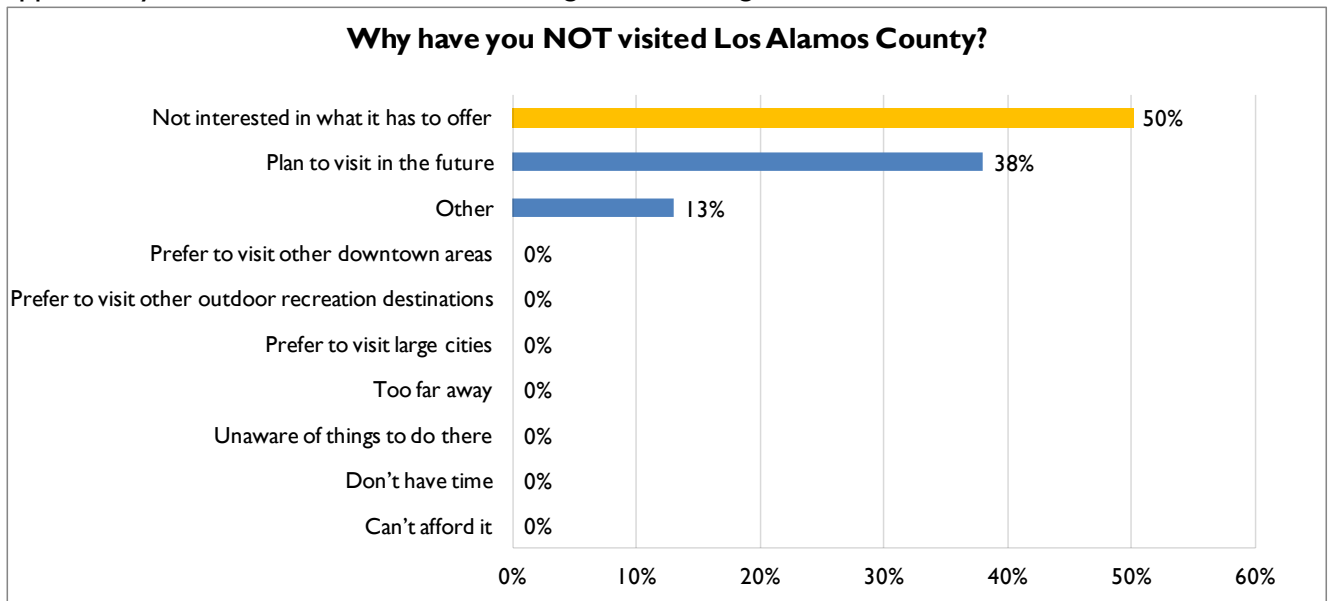
Why WOULDN’T you consider moving/relocating to Los Alamos County?

- *“It’s expensive, reclusive, and there isn’t enough independent business activity outside of the Lab.”*
- *“I tend to judge the county by the town of Los Alamos, which I find flabby and depressing.”*
- *“There aren’t enough activities, and it’s a one company town.”*
- *“There’s nothing to do there besides hiking. There’s not one good restaurant.”*
- *“It’s too isolated and not a very strong community since the residents come from all over the world. There’s not much to do in the town.”*

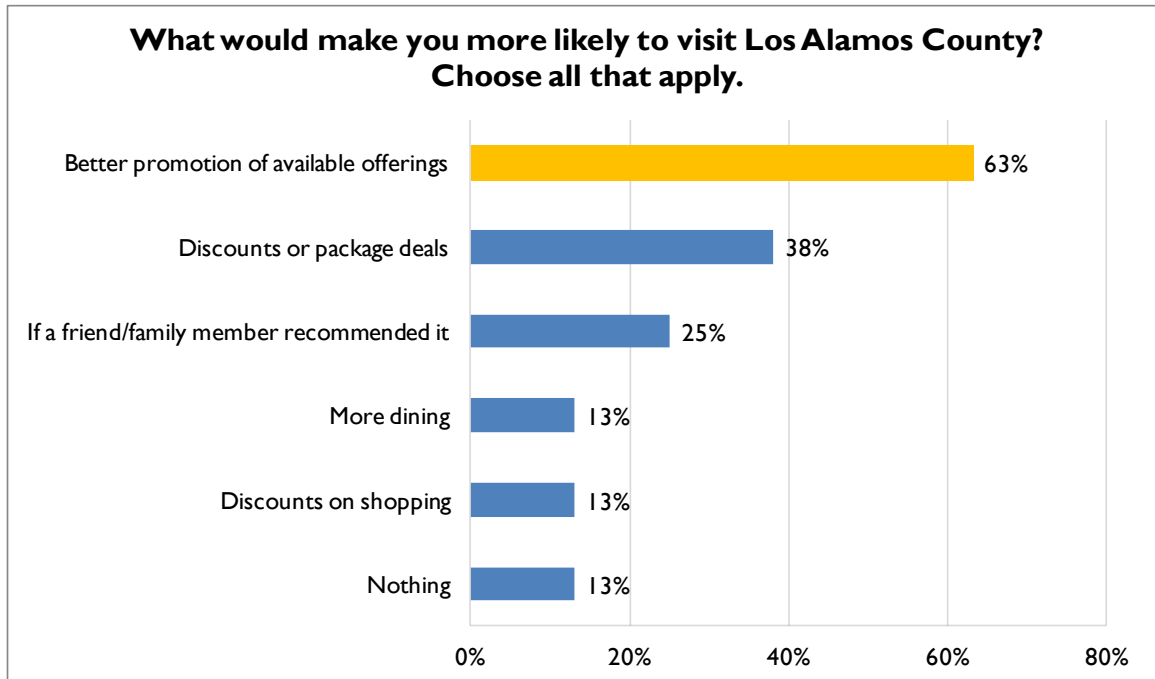
DESCRIBING LOS ALAMOS COUNTY



Visitation: The 37% of respondents who mention they plan to visit represent a great opportunity to affect visitation via marketing and branding.



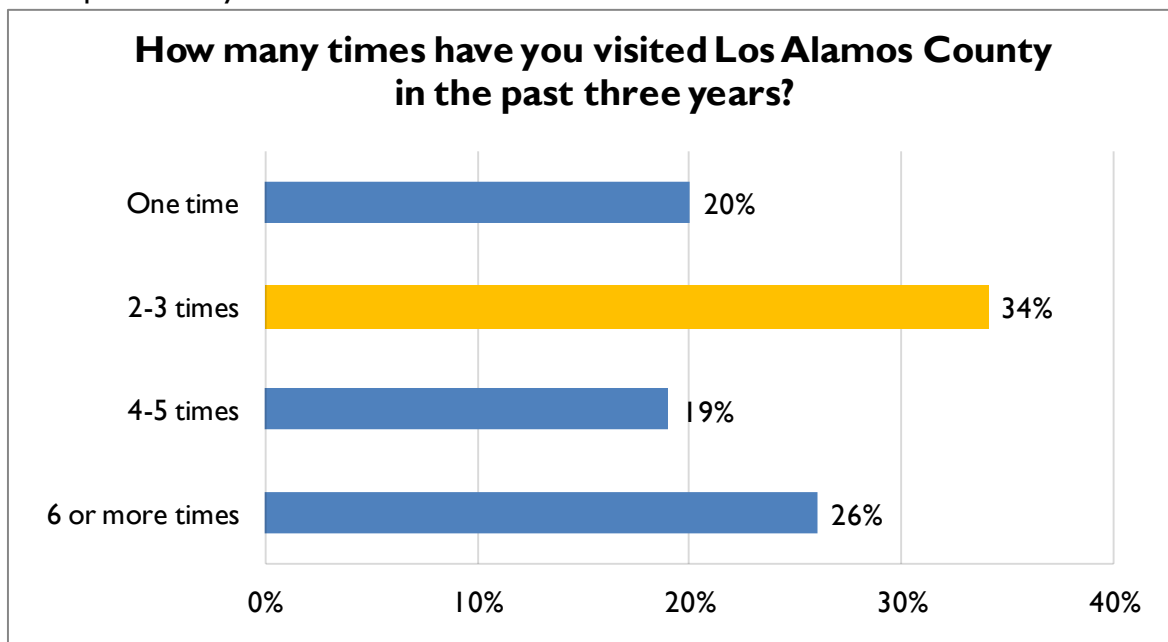
Attracting visitation: Better promotion of available offerings would make people more likely to visit Los Alamos County.



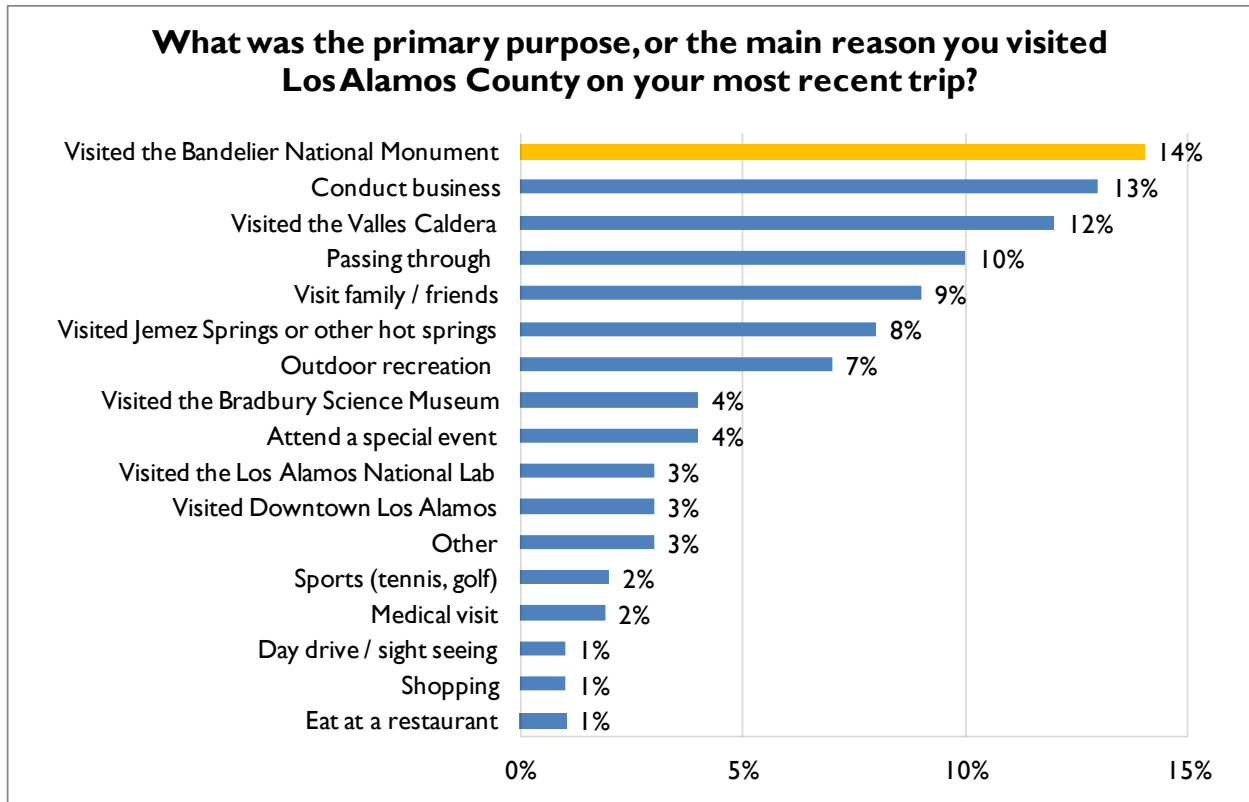
VISITATION QUESTIONS

The following questions were posed only to respondents who indicated that they have visited Los Alamos County, NM.

Visitation frequency: The majority of respondents have visited Los Alamos County 2-3 times in the past three years.

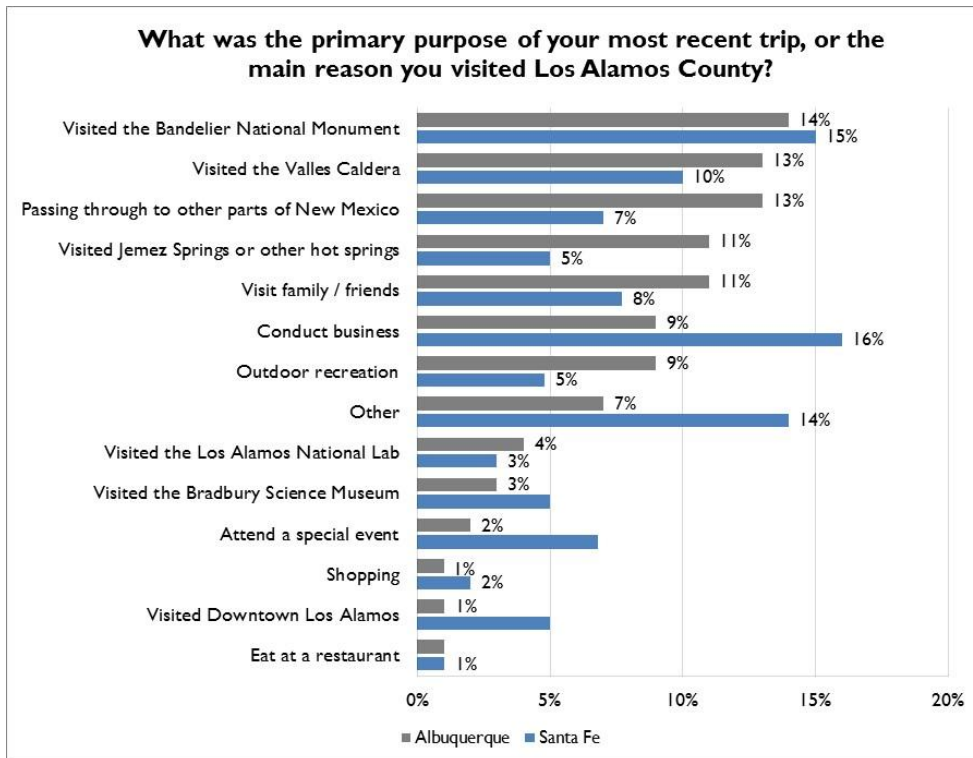


Trip purpose: As a primary purpose, outdoor recreation seems to be a top motivator for visitation given the outdoorsy nature of The National Monument and Valles Caldera.

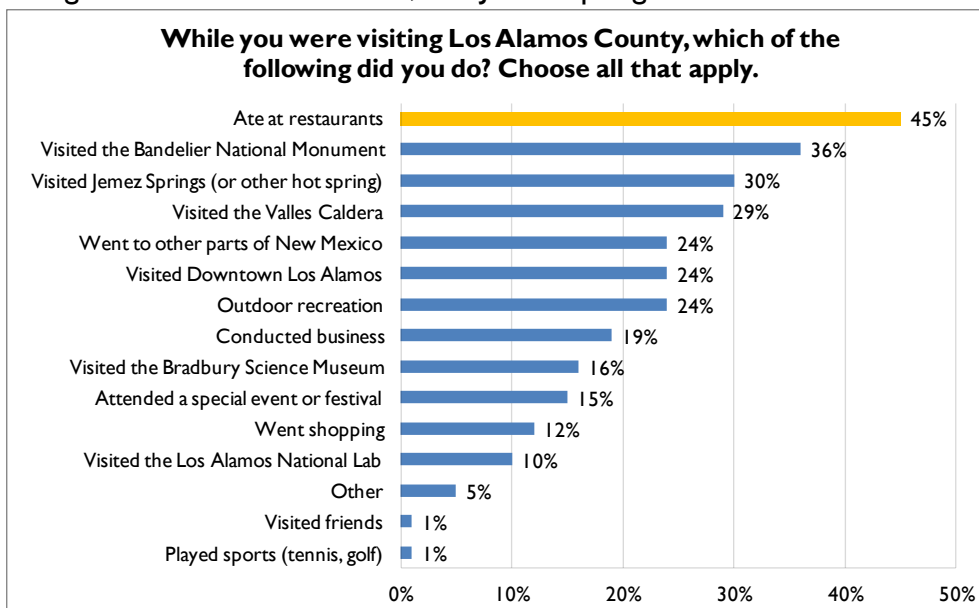


Other: Many of the above, cannot recall

Trip purpose by market: Santa Fe residents are much more likely to visit Los Alamos County for business and seeing a special event or downtown Los Alamos. Albuquerque visitors come to the area more prevalently to see the Valles Caldera, Jemez Springs and to visit friends and family.

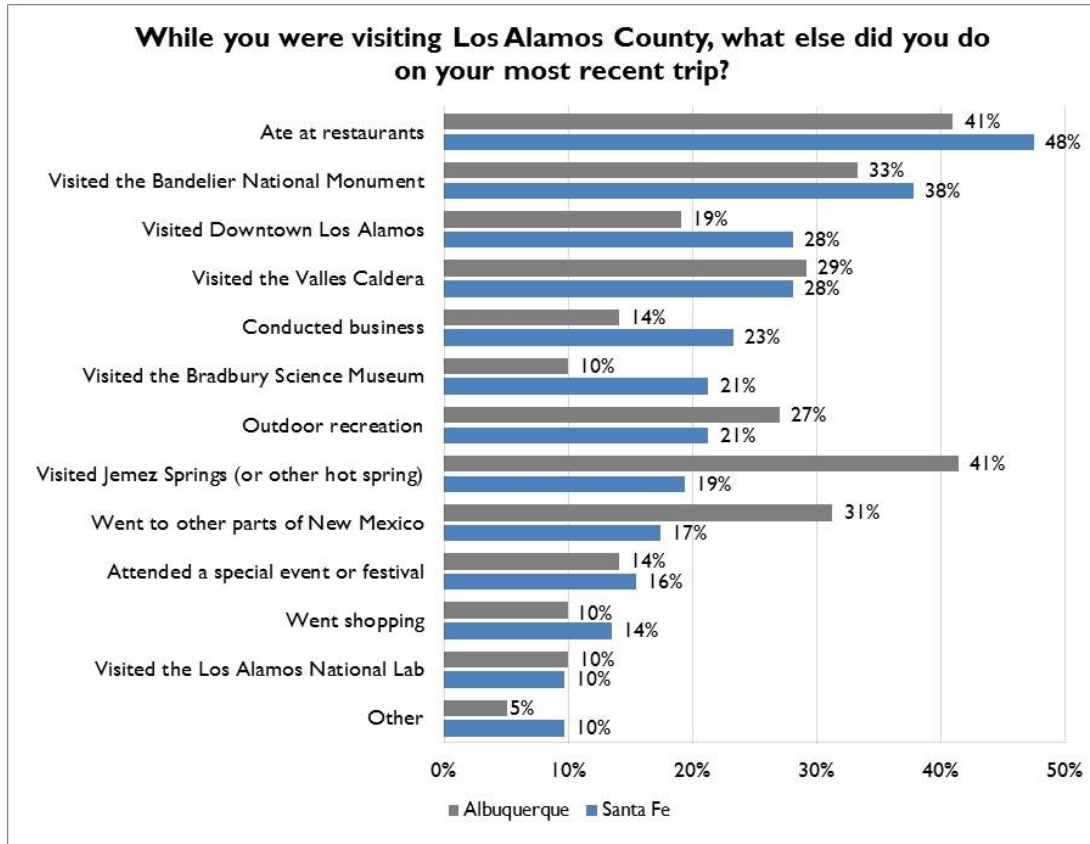


Trip activity: Aside from eating at restaurants, most visitors are also spending their time at some of the regional assets like Bandelier, and Jemez Springs.



Other: Nothing, went to church

Trip activity by market: Capturing the Albuquerque travelers who are passing through the area represent a great tourism opportunity.



TRIP FOLLOW-UP

You mentioned you did some form of outdoor recreation while you were in Los Alamos County. In your opinion, what is special about the outdoor recreation in Los Alamos County versus other parts of Northern New Mexico?

- "Beautiful hiking trails that are not crowded."
- "The long range vistas are pretty spectacular, and the sky overhead, which surrounds you on all sides."
- "Good skiing that is never crowded."

You mentioned you went elsewhere in New Mexico on your visit. Where else did you go?

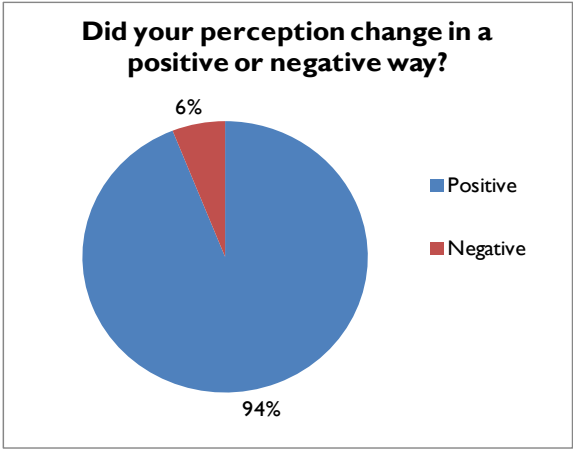
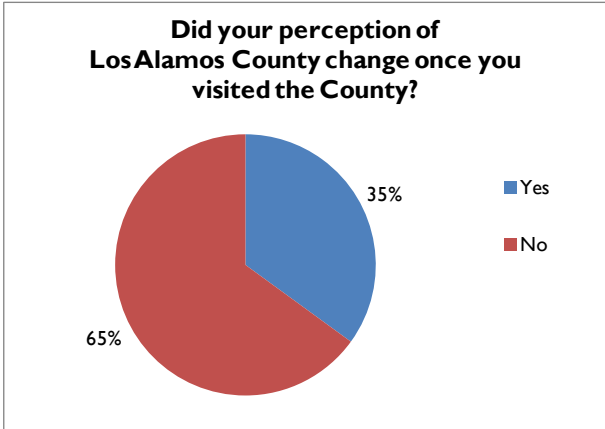
- Santa Fe (majority)
- Taos

You mentioned you visited Downtown Los Alamos. In your opinion, what is missing from the downtown experience in Los Alamos that would encourage a repeat visit to the area?

- Retail, restaurants, nightlife
- Nothing

What was your perception of Los Alamos County before you visited?

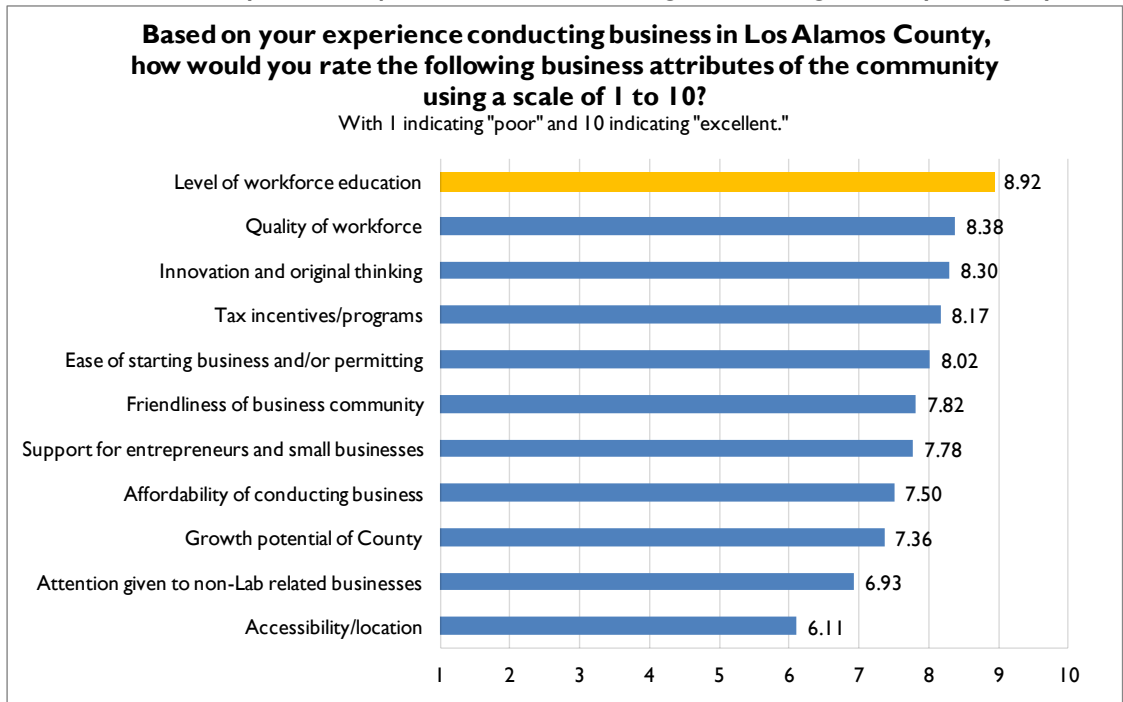
- “An isolated town of research scientists.”
- “I didn’t have one.”
- “Isolated and selective.”
- “Same as it is now: a beautiful small town centered around Los Alamos National Laboratory.”



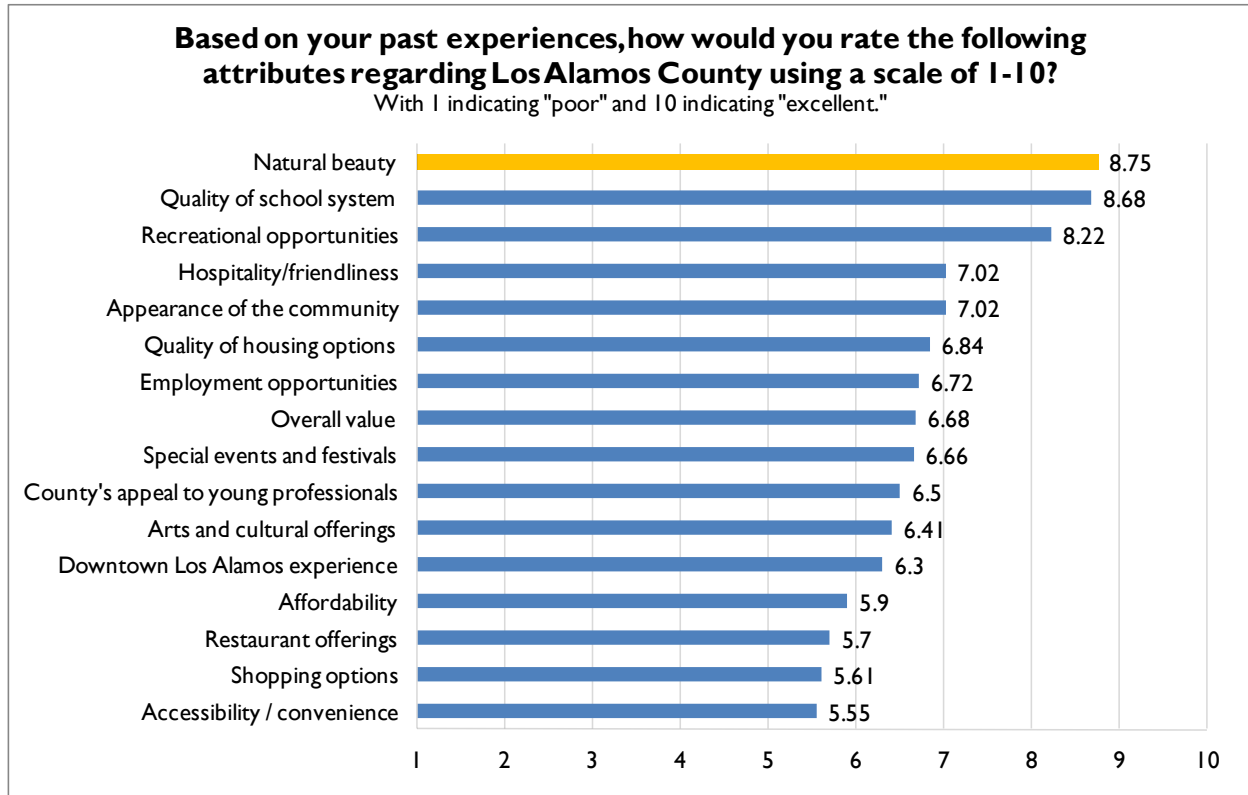
What changed your perception?

- “I didn’t realize how pretty the area was and that it housed Bandelier, which is on the top of my list for my next trip.”
- “I was only considering the Lab; I didn’t take into consideration the scenery and that the Lab is just a small part of the County.”
- “Seeing the outdoor recreation possibilities and greater diversity of people who live there.”

Business attribute: Compared to internal perspectives, the outside reputation of the business community is more positive with the ratings increasing in every category.



County attribute: Although outsiders view the County positively for natural beauty and other attributes, respondents also recognize the need for additional or improved restaurant and retail options.



In your own words, describe the impact the Los Alamos National Lab has on the following areas.

COUNTY IMPACT

- "Extremely strong - if not for the Lab, the County would be empty."
- "I would think it's major based on the number of employees it supports."
- "It's probably the determining economic force in the County."

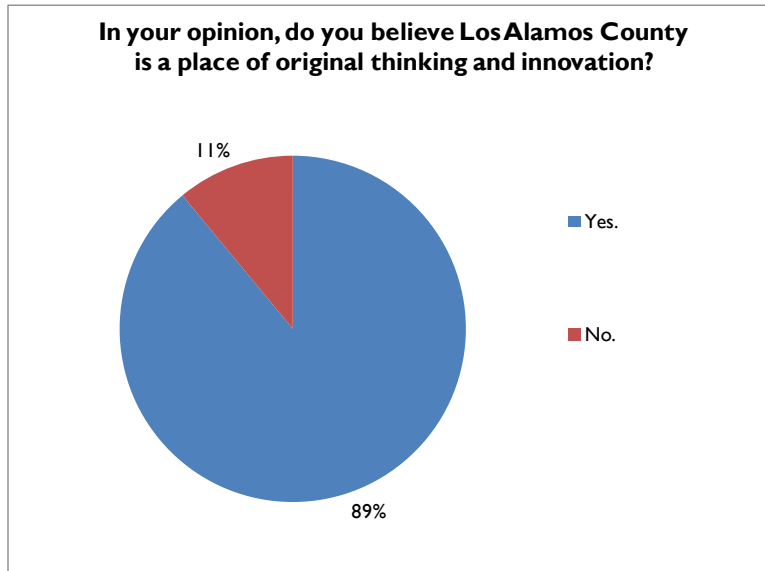
NEW MEXICO IMPACT

- "Big help to the state financially."
- "It's an economic impact drawing highly educated engineers and scientists to the state."
- "It's half the reason anyone lives in New Mexico."

NATIONAL IMPACT

- "A lot less than in the past."
- "It's a huge historic impact due to nuclear research."
- "A key component to national defense."

Original thinking and innovation: The majority of respondents consider the County to be a place of original thinking and innovation.



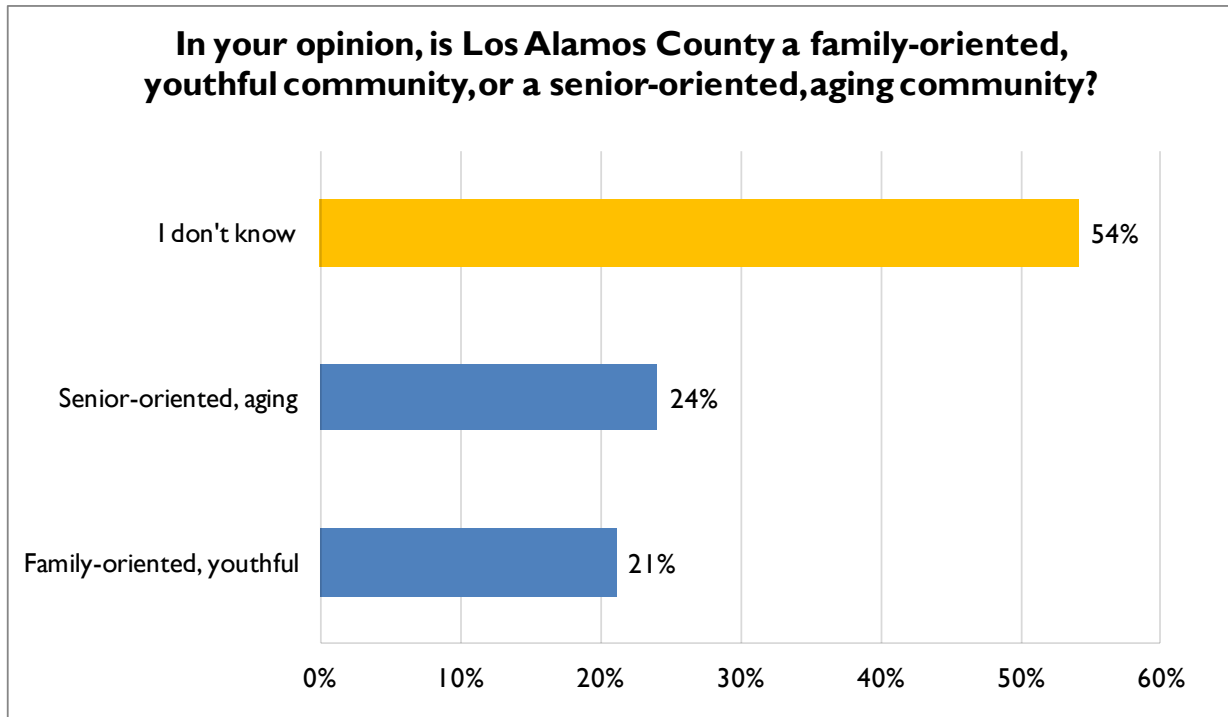
Yes. Why?

- *“There are so many minds there that want to think and perceive thinking as a good thing.”*
- *“People are always coming up with new ideas. It’s amazing, really.”*

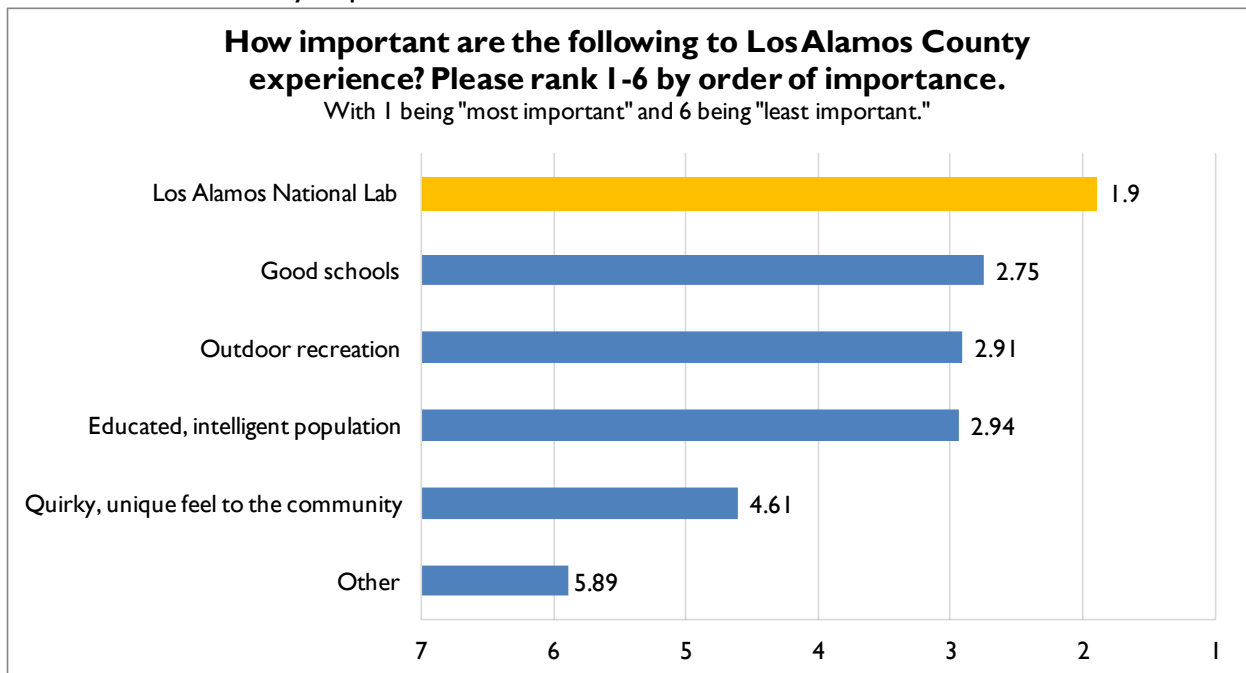
No. Why?

- *“Outside the Lab, it’s very narrow in its thinking and not too friendly.”*
- *“The Lab employees, though very intelligent, are basically government bureaucrats. There is no risk taking.”*

Community age: Most respondents do not know if Los Alamos County is a youthful or aging community.



Los Alamos experience: Outsiders see the Los Alamos National Lab as most important to the Los Alamos County experience.

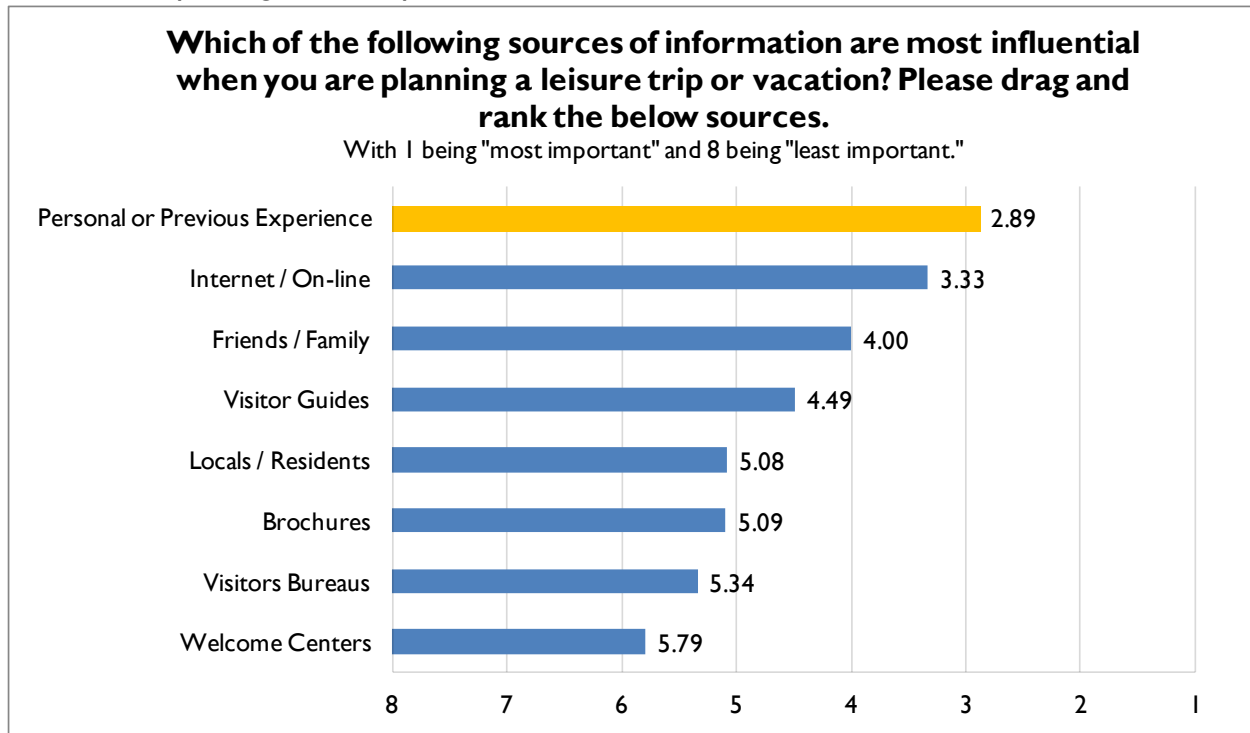


Other: Beautiful scenery, safety, history, proximity to Santa Fe

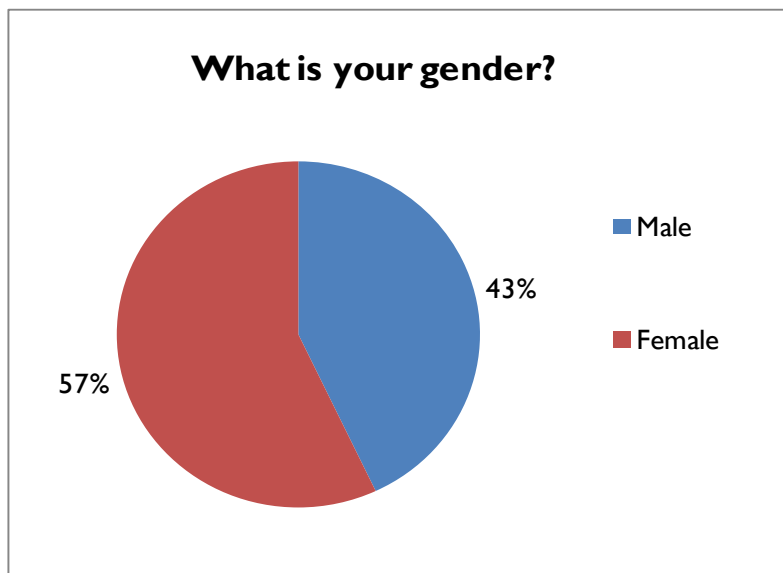
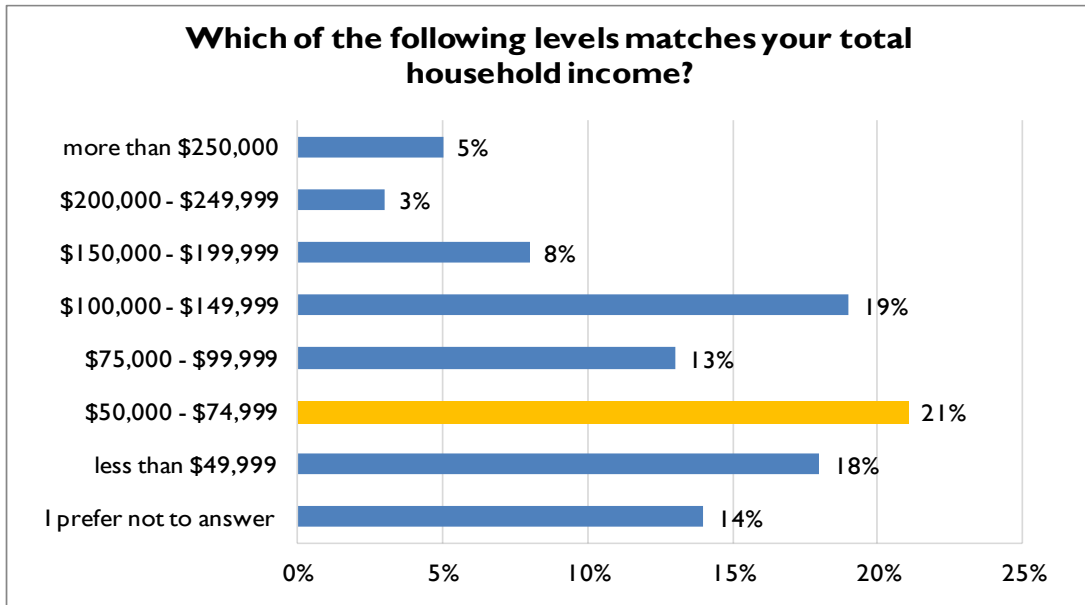
In your opinion, how can Los Alamos County improve its reputation and increase awareness in New Mexico and across the state?

- Advertising
 - *“Advertise the diversity of the experience: the museums, recreation, springs, historical sites, etc.”*
- I don’t know
 - *“I have no idea. It’s a very odd community. Hard to be cohesive with so many different cultures and backgrounds in one spot.”*
- Host more events
 - *“Have some major, prestigious arts festivals like the Santa Fe Chamber Music Festival or the Santa Fe Opera, with big names and high quality.”*
- Doing a fine job already
 - *“I think its reputation is fine. Maybe a bit conceited and elitist – try to change that.”*

Trip planning: Personal or previous experience is most influential when planning a leisure trip or vacation, speaking to the impact of word of mouth recommendations.



DEMOGRAPHICS



PERCEPTION STUDY

Purpose

The purpose of the Perception Study is to gain an in-depth understanding of the brand perceptions of Los Alamos County among important target audiences. What do these constituents of the brand have to say about the area as a place to live, visit or grow a business?

Methodology & Results

North Star consultants conducted perception interviews via telephone. The targeted audiences included state and regional economic development, tourism industry professionals, competitor communities as well as real estate developers and agents. Questions were phrased to gather qualitative information. An executive summary for the data is outlined below.

If you had to describe Los Alamos County in ONE WORD, what one word would you use?

- Scientists
- Educated
- Interesting
- Unique
- Isolated, insulated
- Company town
- Innovation
- Technology
- Mountainous
- Unanticipated

Describe Los Alamos County to someone who has never heard of it before.

- Highest income level in the state
- Educated residents and workforce (high IQ)
- High tech
- Beautiful, clean
- High altitude
- It's a community run by the Department of Energy and the government
- Home to LANL
- There's a mysterious element to that community
- Hiking and recreational
- Native American and Hispanic heritage
- You don't even know you are about to drive up to it; it comes out of nowhere

In your opinion, what are the County's greatest assets?

- Los Alamos National Lab
- The exemplary learning environment
- Access to educated talent pipeline
- The White Rock community, more affordable area
- Tremendous knowledge base
- Weather is beautiful, scenery is nice
- Historic role in atomic story
- Historic landmarks – like Bath House Row
- County of the future – lots of potential
- Historic museums, Fuller Lodge
- Bradbury Science Museum
- A tourism hub for the Northern New Mexico region
- Bandelier National Monument and Valles Caldera
- Parajito Mountain (Ski Hill)

In your opinion, what are the County's greatest challenges?

- Increasing the population base to attract retail and development
- Limited availability of land (government owned, restricted by mesas)
- High cost of land and commercial rent
- Poor quality housing (lack of affordable options)
- Lack of spin off businesses from the LANL
- The Lab's products don't translate into manufacturing jobs for the state
- Very secretive; no one knows what's happening there
- Poor amenities (entertainment, nightlife, restaurants, retail, etc.)
- Because of high household income, state not able to support/supplement funds
- Just have basic hotels; nothing high-end or edgy
- 60% of downtown is asphalt
- Downtown has a poor sense of place
- Retail leakage into Santa Fe and elsewhere

In your opinion, what are the County's greatest opportunities?

- Improve housing options (affordability and diversity of options)
- High-end, non-standard lodging
- Attract additional entertainment and nightlife
- Tech transfer and spin off firms from the LANL
- Diversify economy
- Diversity income levels to keep costs down
- Leverage outdoor recreational assets for tourism
- Tourism growth
- Encourage out-of-the-box architecture (don't just build typical New Mexico buildings)
- Mixed use facilities downtown
- Create a dynamic downtown with a strong sense of appeal
- White Rock community

- Long-term economic development plan
- State of the art performance venue
- Develop interpretive material for tourists
- Rim trail for mesas and canyons

In your opinion, what makes Los Alamos County unique? What sets it apart?

- Los Alamos National Lab
- High incomes/affluence
- Wonderful climate
- High desert location
- Urban center in a mountainous setting
- Gateway for outdoor recreation
- Science and technology
- The quirky feel to the community
- Small county

What is the single most important message about Los Alamos County that should be told to outsiders?

- The high concentration of skills and knowledge
- Los Alamos finds a way to welcome you
- The beautiful, clean environment
- Top secret work being done
- County is open and eager for new businesses
- Presence of high mesas
- Fascinating history
- People are theoretical and contemplative, very different

What is the single most important aspect to the Los Alamos County identity?

- Begin with the knowledge base in the County
- Attract development using scientific minds and well-educated individuals
- Great land that needs to be developed
- Knowledge and experience that impacted the history of our country

In your opinion, do you consider Los Alamos County to have some of the best brains and sharpest minds in the country?

- YES! (Virtually every respondent emphatically said YES to this question)
- High per capita of Ph.Ds
- This community is a think tank – many profound discoveries are made there
- This is effective for some new businesses looking for research and science

COMPETITIVE ANALYSIS

Purpose

To better understand what Los Alamos County's competition is currently offering in terms of economic development and delivering the tourist experience.

Methodology & Results

North Star reviewed each of the following counties' communication materials to compile a short synopsis of their tourism and economic development attributes. The materials reviewed include but are not limited to the county's website, the CVB website, Chamber website, area attraction websites as well as other communication materials such as brochures and visitors guides.

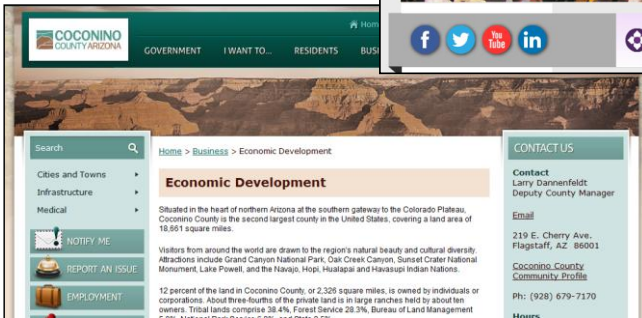
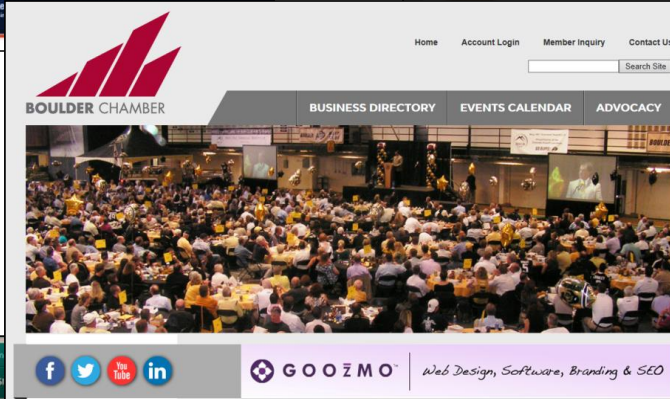
ECONOMIC DEVELOPMENT AND TOURISM

- Bernalillo County, NM
- Santa Fe County, NM
- Sandoval County, NM
- Boulder County, CO
- Coconino County, AZ
- Jefferson County, CO

NATIONAL LAB COMMUNITY COMPETITORS

- Oak Ridge, TN
- The Tri-Cities Area (Washington)

COMPETITIVE ANALYSIS | ECONOMIC DEVELOPMENT VISUALS



COMPETITIVE ANALYSIS | ECONOMIC DEVELOPMENT

Bernalillo County, NM

Chamber Positioning Line:

- “*Business Building a World Class Community.*”

Marketing Messaging:

- Bernalillo County, New Mexico does not seem to have its own Chamber of Commerce. However, there are many Chambers located within Bernalillo County. Since Albuquerque is a large and prominent city located in Bernalillo County, North Star focused on the Greater Albuquerque Chamber of Commerce.
- This Chamber of Commerce website offers easy to use navigation, with a variety of well organized menus located in clear view on the homepage.
- The website highlights the great quality of life, including the educational system, transportation network, small business community, healthcare, sustainable environment, and natural beauty. It contains many tools for new and existing businesses but no business incentives.
- The homepage is visually appealing with a large scenic picture. There is an arrow located on the right side of the picture which allows the viewer to scroll through different aspects of the Chamber, each with a large, visually appealing picture.
- Other pages of the website continue to have a nature theme and have a scenic picture of the mountains across the top and a color palette of white, blues, and red.



Sandoval County, NM

Chamber Positioning Line:

- “Business Building a World Class Community.”

Marketing Messaging:

- The Greater Sandoval County Chamber of Commerce website has many links on the left side of the homepage. One of the most helpful tools seems to be the business directory. However, once the viewer scrolls through the list, many categories are blank.
- The “Tools for Business Success” link on the homepage is the link with the most information. However it is unclear that this would be the case by just looking at the homepage. On this page there are many links for all kinds of business, from new businesses to existing businesses who are wanting to improve. This page also offers the option to switch from English to Spanish.
- The site has information on tax incentives, location, funding programs, new business information, and much more.
- There are links to the Sandoval County Small Business Development Center and Albuquerque Score, both tools for small businesses.
- The website tends to be link heavy and confusing. The color palette is earth tones, featuring colors that are present in the desert.



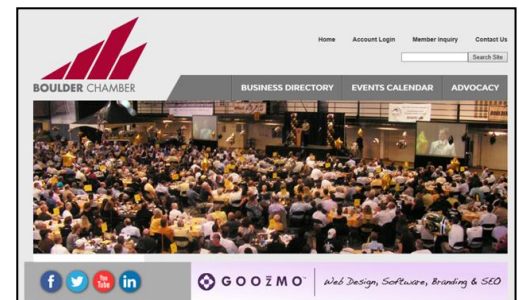
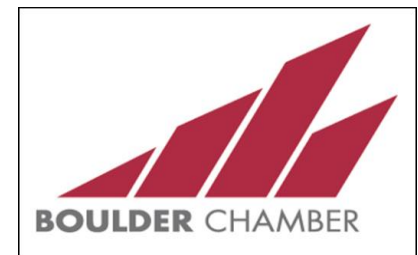
Boulder County, CO

Chamber Positioning Line:

- “For a Bolder Business Community.”

Marketing Messaging:

- The Boulder Chamber’s website features many links for new businesses and potential members, as well as a “Business Directory” which is useful to residents. The website tends to be link heavy and unorganized, although it provides good information to those who look through it.
- The homepage readily features useful information such as the Chamber’s new plan for the community.
- At the very bottom of the left column there are links to other organizations in Boulder which are helpful for businesses and residents alike, such as the city of Boulder government website, the Boulder Economic Council and the Convention and Visitor Bureau.



- The website seems to be very up to date on current events and the economic situation.
- The color palette is maroon, gray, and white and appears very clean and sharp.
- The Boulder Economic Council website highlights the great quality of life offered in Boulder, from the weather to all the outdoor activities. It also emphasizes business resources and the area’s top industries including aerospace, bioscience, renewable energy, software, data storage, outdoor recreation.

Coconino County, AZ

Chamber Positioning Line:

- None found.

Marketing Messaging:

- Coconino County did not have its own Chamber of Commerce website, so North Star focused on the economic development section of the Coconino County government website.
- The “Economic Development” page features contact information on the right and a menu bar on the left. All links featuring lists of their respective category. The “Cities and Towns” page also offers a link to the “Community Profile” of each city.
- On the homepage of the “Economic Development” section, there



is a description of the County, emphasizing cultural diversity, location, natural beauty and the major city of Flagstaff as the county’s economic, medical and transportation hub. Both Coconino County and the city of Flagstaff were named Enterprise Zones. Flagstaff is also known for its astronomy, astrogeology, and genomics.

- The color palette of the website is red earth tones, blues, and teals. In comparison to other economic development websites, this site has limited information mostly aimed to assist residents rather than new or existing businesses.



Jefferson County, CO

Chamber Positioning Line:

- “Business. Economy. Community.”

Marketing Messaging:

- Although the West Chamber began as the Lakewood Chamber of Commerce, in 1990 it merged with the Wheat Ridge Chamber of Commerce to be the West Chamber Serving Jefferson County.
- On the left side of the website, there is a unique “Share” feature that remains fixed throughout navigating the website. It gives the option to share through Facebook, Twitter, Pinterest, and more.
- The top bar with many menus also travels with the viewer through the website. The menus offer a variety of information, however there are many different menus spaced very closely together along the top.
- The site focuses on the leaders and potential leaders in the community. It also highlights businesses that are doing well in the community and different financial incentives.
- The website features a palette of grays, blues and whites. The homepage is very clean and easy to read, but looks incomplete, with spaces for additional links on the right column and other unnecessary white spaces.

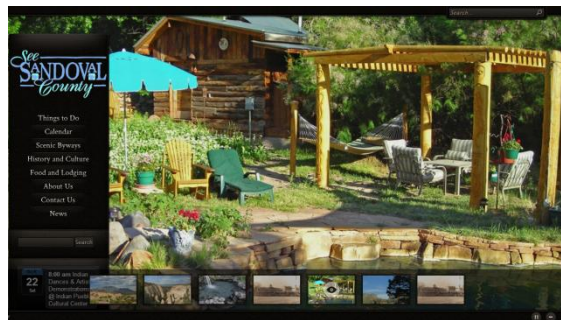
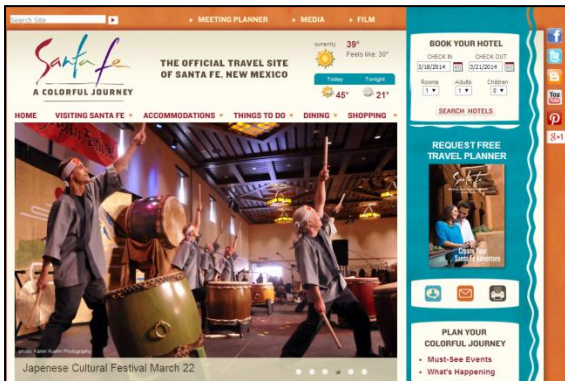
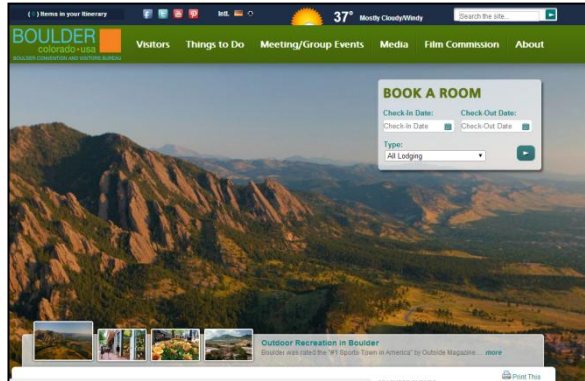


ECONOMIC DEVELOPMENT SUMMARY

What do these communities share in common? What differentiates them?

- Many of the communities identified as competitor communities did not have their own Chamber of Commerce website. Therefore, for the analysis, either the economic development page of the county website was used or another Chamber of Commerce website which seemed to represent the County.
- The Greater Albuquerque Chamber of Commerce website is the most visually appealing, sophisticated, organized and easy to use.
- Four out of the five logos have a mountain type design. Two have earth tone and desert color palettes that remind the viewer of the location in the desert. The natural beauty of the area is highlighted on almost all of the websites.

COMPETITIVE ANALYSIS | TOURISM VISUALS



COMPETITIVE ANALYSIS | TOURISM

Bernalillo County, NM

CVB Positioning Line:

- “It’s a Trip.”

Marketing Messaging:

- Bernalillo County, New Mexico does not seem to have its own CVB or tourism website. Using the County website to access the tourism section yields a 404 error.
- The Albuquerque CVB site, however, focuses on the region’s rich culture, heritage, and history. It emphasizes Native American culture and various museums. The site also highlights the wide variety of outdoor activities that the region offers.
- Based on the County website, Bernalillo County emphasizes community culture and the Sandia Mountains as their top assets. Furthermore, the front page features a rotating view of news and events.



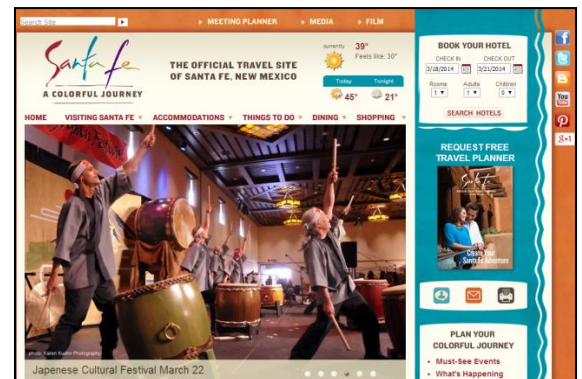
Santa Fe County, NM

CVB Positioning Line:

- “A Colorful Journey.”

Marketing Messaging:

- The Santa Fe County CVB shares a website with its city. The homepage offers a multitude of links that are both organized and easy to use. The site also displays links for meeting planners, media, and film prospects at the top of the page.
- The site labels Santa Fe as a location that is a journey where legendary history meets culture. It highlights the diverse visual arts, award winning food and restaurants, and relaxing spas. Furthermore, it promotes the areas as a year-round destination.
- The color palette includes orange and blue, using designs similar to Native American pueblos. The front page features a scrolling slideshow of activities and awards. Overall, the site is visually appealing.
- Other pages of the website continue with the theme, offering the same color palette and hosting pictures or awards for every click.



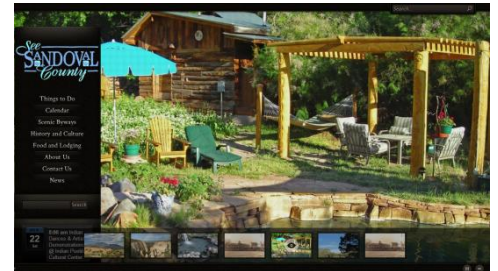
Sandoval County, NM

CVB Positioning Line:

- “See Sandoval County.”

Marketing Messaging:

- The Sandoval County Convention and Visitors Bureau website has many links on the left side of the homepage. Besides the links, the homepage does not offer any marketing narrative to promote Sandoval County as a tourist destination.
- The “things to” link on the homepage provides the most information. However, the link directory is not optimally formatted. It is apparent that the links are supposed to highlight Sandoval County’s best assets, but this leads to additional, less relevant links once the buttons are scrolled over.
- The homepage is visually appealing and hosts a few large scenic pictures and a small area for event postings. Otherwise, it is sparse. On the other pages, the background changes to a desert tone. The navigation bar appears on every page, making it easy to navigate the site.
- While no asset is particularly promoted, the main assets of Sandoval County appear to be its landscapes and natural beauty, all of which can be seen along the County’s many scenic byways. Other assets include history, hot springs, and other activities such as hot air ballooning.
- The website is simple and easy to understand, but could use additional pictures or updates.



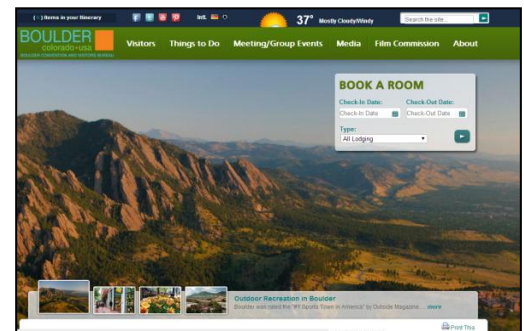
Boulder County, CO

CVB Positioning Line:

- None found

Marketing Messaging:

- The Boulder County Convention and Visitor’s bureau shares a website with the city. It features a navigation bar that links to all aspects of the community and remains at the top of every page. The website is easy to navigate, and offers links for international users and movie production.
- The homepage features links for social media and to book rooms. The main area of the front page includes buttons named “Fresh Stories,” “For Foodies,” “Watch the Video,” and “Hot Events.”



- The homepage text emphasizes the area’s skiing and their award for Foodiest Town in America. On top of this, the layout of the website promotes Bolder as a hip town and cultural center.
- The website is media savvy, using a high quality video to introduce all of the features of the area. Other important features of Boulder appear to be their emphasis on green culture, bike culture, and breweries.
- Links are not generic, making the site feel vibrant and fresh. Instead of “Things to Do,” the site features link names such as “7 Ways to Sip and Savor Boulder” or “Boulder’s Foodie Checklist.”
- The colors used on the website are various shades of green, but uses pictures of the Rocky Mountains as a backdrop for every page.

Coconino County, AZ

CVB Positioning Line:

- *“The destination for all seasons.”*

Marketing Messaging:

- Coconino County did not have its own Convention and Visitors website, so North Star focused on the visitors section of the Coconino County government website and Flagstaff’s CVB site.
- The site does not put emphasis on tourism. The visitors section is fairly unorganized and does not feature any statement from the CVB.
- The attractions listed on the site link out to those attractions’ webpages. Main assets include national parks (which include parts of the Grand Canyon), Lowell Observatory, and Lake Powell.
- The Flagstaff CVB site heavily markets the community as a hub for outdoor activities. It emphasizes the area’s mountains, extensive pine forest, snowboarding and skiing, camping, proximity to the Grand Canyon, and distinct four seasons.
- The Flagstaff site also emphasizes the region’s history, including Native American culture and Route 66.



Jefferson County, CO

CVB Positioning Line:

- “Get Lost in Adventure.”

Marketing Messaging:

- The Jefferson County Convention and Visitor’s Bureau website offers easy navigation and plenty of links to navigate the site. Besides tourist information, it includes information about each community and relocation offerings.
- The site gives no indication that it is the Jefferson County CVB site unless the user reads through it.
- The homepage is visually pleasing and hosts a slideshow of major assets. It is quite informative and features a rocky background likely taken at the County’s Red Rock venue. However, some links lead to visually unappealing lists.
- Other pages on the site use brown, earthy tones that complement the homepage well.
- The website emphasizes Jefferson County’s mix of urban amenities and Rocky Mountain adventures. Its major assets are Red Rocks Concert Venue, Coors Brewery, Bandimere Speedway, and the area’s various museums.

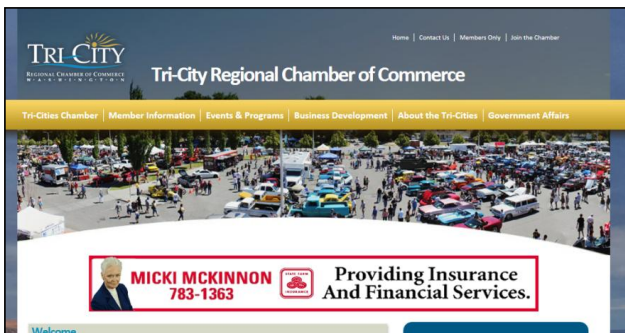
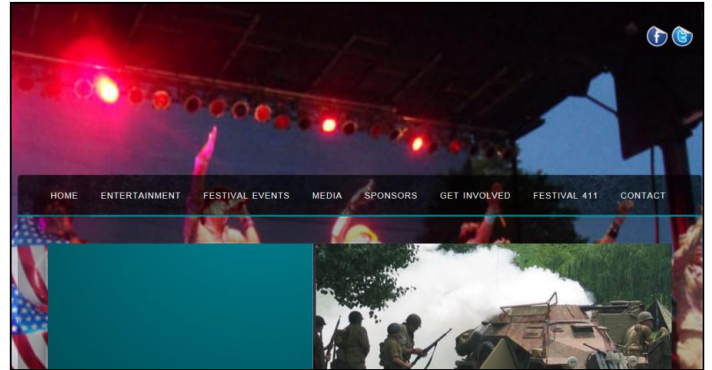


TOURISM SUMMARY

What do these communities share in common? What differentiates them?

- Every community used mountains as an asset to sell the community.
- Most communities placed an emphasis on outdoor living while still enjoying urban culture, but counties with smaller communities placed more focus on history and other attractions like spas.
- Boulder County and Santa Fe County both had well made websites, but were sharing their website with a city within the County. Furthermore, they both expressed an interest in hosting movie production. Jefferson County is the only county with a CVB website complete and separate of other entities.
- Most of the counties applied earthy tones to their color palette. Boulder’s website was the only site that did not have an earthy brown or orange.

COMPETITIVE ANALYSIS | NATIONAL LABORATORY VISUALS



COMPETITIVE ANALYSIS | NATIONAL LABORATORY COMMUNITIES

Oak Ridge, TN

Marketing Messaging:

- Oak Ridge is home to the Oak Ridge National Laboratory, however if the viewer did not know this when looking at the city website, they may not realize the promotion of the “Secret City” is in fact the connection to the National Lab. The “Secret City Festival” is one of the featured events that appears predominately on the homepage, which features an atomic symbol. The festival also has its own website which can be accessed through the city website.
- The city’s seal also relates to the Lab through the use of an atomic symbol in the center of the image.
- The Convention and Visitor Bureau website urges the viewer to “Unlock the Secrets of America’s Secret City” as well provides information on the lab and its history.
- The Oak Ridge Chamber of Commerce website offers no clear information on the National Laboratory.
- The Oak Ridge Economic Partnership mentions the National Lab in the first sentence on the homepage. The lab also has its own page under the “Innovation” menu on the top toolbar.
- The Oak Ridge National Laboratory seems to be promoted more under the guise of tourism than economic development through promotion on the city and Convention and Visitors Bureau website.



The Tri-Cities Area

Marketing Messaging:

- The Tri-Cities Area is home to the Pacific Northwest National Laboratory.
- On the Visitor and Convention Bureau website, there is a mention of the Lab under the description of Richland.
- Since the Lab was briefly mentioned under the description of Richland, North Star reviewed the city of Richland city website, where there is a link to a page about the Hanford Communities and the location of the National Lab, under the “Government” menu on the homepage. This page gives very limited information about the community, not even specifically the National Lab.
- The Tri-City Area Chamber of Commerce website does not seem to mention the Lab at all.
- None of the logos researched, including for the Tri-City Area’s Visitor and Convention Bureau, the Chamber of Commerce, or Richland, WA, have anything to do with the National Lab. They all contain suns and highlight the natural aspect of the region.



NATIONAL LABORATORY COMMUNITIES SUMMARY

What do these communities share in common? What differentiates them?

- Neither Oak Ridge nor the Tri-Cities Area heavily promotes their National Laboratories. The lack of promotion could work to Los Alamos County's advantage. Perhaps Los Alamos County can seize this opportunity to use their national laboratory as a way to promote economic development in their community.
- The Tri-Cities Area websites have color palettes of blue, orange, red and yellow and feature suns in their logos. The city of Oak Ridge website is blue, green and grey and features an atomic symbol in their city logo and their search bar logo.
- All of the websites are very sophisticated, have a good balance of photographs and text, and are visually appealing.

WHERE THE BRAND SHOULD BE

The Insights portion of this process comprises the emotional and subjective sparks – gleaned from our intellectual and objective research – that point like a compass to the strategic position that best supports Los Alamos County’s goals.

Los Alamos County’s primary goals include:

- Assist the County and its partners in defining and deploying branding to promote a compelling and unified image of Los Alamos County.
- Define the strategic advantages of Los Alamos County from a competitive image standpoint over other communities in the region, nation and the world.
- Develop marketing approaches that would infuse strategic advantages into communications, both county and communitywide, in a consistent and positive manner.

With these objectives in mind, we need to focus the branding strategy in the markets that will be most receptive to the brand communications. Furthermore, the brand strategy must differentiate Los Alamos County in the region and increase awareness and regard within the community and beyond. This differentiation must remain in keeping with the personality perceived by stakeholders, visitors and prospective businesses alike.

Using the research gathered as fodder for thought, our insights come from asking numerous, provocative questions:

- What emotional attachments can the brand hold for the consumer?
- How does the brand fit into his or her lifestyle?
- How can the brand best be used to redefine perceptions?
- How can the brand stand out in the marketplace?

These insights will become the framework of our creativity on behalf of the brand.

INSIGHTS ABOUT LOS ALAMOS COUNTY

“If everyone is thinking alike, then somebody isn’t thinking.”

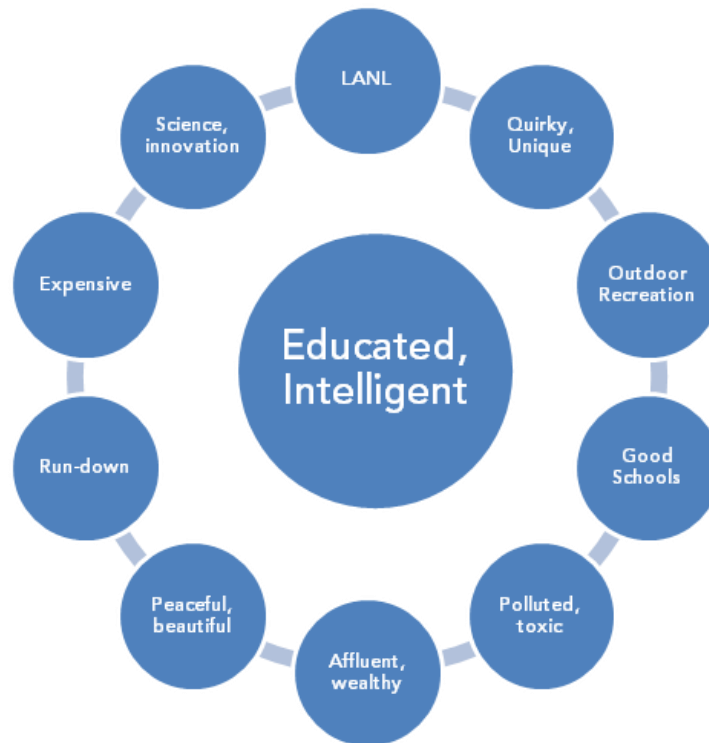
- George S. Patton

Throughout North Star’s research, a variety of thoughts and perceptions about the community were collected from individuals inside and outside the County. Here are some of the biggest perceptions gathered throughout our research that were shared by inside and outside perspectives.

- Los Alamos National Lab – One of the greatest assets of the community, and the reason for the County’s existence. The National Lab is the key economic development interest in the area.
- Quirky, unique – Many people spoke about the quirky, unique culture here. Many loved that about the community!
- Outdoor Recreation – A great asset for tourism in the county. Lots of people discussed the opportunity this has for the future. In North Star’s research, outdoor recreation was seen, at times, to be a greater asset than the National Lab.
- Good schools – Highly ranked in the state, the schools are known throughout the region for their excellence.
- Polluted, toxic – Some conversations mentioned that the area may be polluted due to the existence of nuclear research and other activities here. This is an inaccurate assessment of Los Alamos County, but being aware that outsiders have this perception of the area is important.
- Affluent, wealthy – Both internal and external voices commented on the areas affluence and wealth.
- Peaceful, beautiful – The setting in Los Alamos County is very desirable and makes for a great place to live, work and play.
- Run-down – Some individuals mentioned the declining aesthetics in the community, and how this is a great opportunity for improvement moving forward.
- Expensive – Some voices commented on the community’s higher cost of living, especially as it pertains to housing costs.
- Science, innovation – This is a science and innovation destination in New Mexico. This message should be told more often to outsiders to help them understand the importance of this community.

The goal is to build a distinct, unique community-wide brand that can connect, mainly, to economic development, but also tourism, community pride, business-development, arts and culture, and more. During all of North Star’s interviews, focus groups, surveys, and other conversations, we heard repeatedly about a certain aspect of the Los Alamos community that really sets you all apart.

And that is the level of education and intelligence in the community. All of these other attributes and perceptions make up the community as well, but what sets Los Alamos County apart is the highly intelligent, well-educated individuals and big brains that live and work here in the County.



North Star’s research shows the importance of the highly-educated and intelligent populous here. The phrase “educated” or “intelligent” was some of the top adjectives, attributes, and assets mentioned throughout North Star’s research.

The phrase “educated” or “intelligent” was the...

- #1 adjective to describe Los Alamos County in the Community Survey, Outside Perception Study, and the CAP Study and throughout the Perception Study.
- #2 rated attribute in the Community Survey.
- #2 rated perception in the CAP Study
- #1 rated business attribute in the CAP Study
- #2 asset in the Outside Perception Study.

“There are tons of highly intelligent, well-educated individuals in Los Alamos County that are making a profound impact on our society that has to be the core of this community’s brand.”

- Quote from North Star conversation

“I’ve never seen a higher concentration of skills! And I work with communities all over the country. The smart, educated residents dominate the population, and that is highly unique.”

- Quote from North Star conversation

A skilled, highly-trained, educated, and intelligent workforce is one of the primary interests of site selectors, economic development professionals, and individuals responsible for finding a location for new and relocating businesses.

But how is this intelligence meaningful for the County? How can we take this overarching asset and apply it to the whole community? Howard Gardner developed the theory of Multiple Intelligences in 1983 in his book “*Frames of Mind*.” He theorized that there were eight specific modalities or intelligences rather than a dominating single general intelligent ability. In other words, there are multiple ways to be intelligent...not just whether you are smart or not. For today’s discussion, we are going to synthesize some of these intelligences into just three.

Emotional intelligence – These are the individuals in the community who use emotion as a primary guiding force. They can relate to one another well, show compassion and heart and volunteer here in the community. Also, these individuals leverage their emotional intelligence to create beautiful art or moving music.

Bodily intelligence – We also heard about the beautiful scenery and enviable outdoor recreation in the County. These individuals with bodily intelligence are the outdoor enthusiasts. They go skiing on the weekends, take advantage of the high altitude to better their endurance and strength. And these are the people here that value fitness, health, and getting out and moving...taking advantage of the sunlight and beautiful climate.

Logical intelligence – Obviously this intelligence reigns supreme here in the County. These residents and professionals leverage their mental capacity to make a big impact on our world. They shape our nation’s discoveries and influence healthcare, science, manufacturing, biofuel and much, much more.

But, the beauty of this concept of multiple intelligences isn’t that you are singularly intelligent in just one of these areas. No, your aptitude for intelligence in these areas vary. For example, you can still be quite logically intelligent while still having a desire to get out and run on the trails – bodily intelligence, or play in a local band – emotional intelligence.

The outcome of these intelligences like physical fitness, volunteerism, beautiful music and stirring art, or highly evolved scientific discoveries, make up the *brain power* of this community. The outcomes and influences that are a result of the churning minds in the Los Alamos County community make up the power that is felt locally and globally by the brains here. *But, brain power is useless if it doesn’t make an impression, cause change, and influence decisions.* These changes can be personal change like a desire to make a difference in the community, local change like watching the children in school excel at science and math, and national change through taking new products to market to change cancer research and national security. This is the positive outcome of such a highly intelligent populous with a lot of brain power. Just like the atom is the basic unit of matter, an idea is a basic building block of intelligence. In this community, a simple idea can have a profound impact that changes an industry, or collects

enough attention to challenge the way we think. A simple idea in Los Alamos County can make you think bigger and live a brighter life.

However, there is one roadblock to branding Los Alamos County effectively. That is, few outsiders, and even some residents, actually know with absolute certainty what is happening in some of the scientific labs in the County. In other words, the outside perception of Los Alamos County is somewhat inaccurate. Anecdotally, most associate Los Alamos County with nuclear research, bombs and other historic activities. The County's identity as a secret city goes beyond the fact that this community was once off the grid. Nowadays, it describes the work of some brilliant minds far off in a room somewhere uncovering the next discovery that will change our world.

So the challenge becomes creating an identity and brand for the County that...

- Stays true to Los Alamos County and accurately depicts the community.
- Doesn't diminish the value of all of the hard work, critical thinking and innovation that happens here.
- And, says it in a meaningful, impactful way! Which can be done in a variety of different ways.

And this is where the creative part of this process can roam free. How the essence of the Los Alamos County community is considered and applied to create a brand that resonates is where the magic happens. Creativity is about emotion, it's about causing a feeling, stirring someone to make a change. And that's what building a brand is all about too...connecting with people's emotions to encourage an action.

"The essential different between emotion and reason is that emotion leads to action while reason leads to conclusions."

- Donald Calne, neurologist

This brand for Los Alamos County can have a tremendous impact on the community, by leveraging the intelligences of this community a forward thinking, progressive, and creative brand can be developed for the County.

After all, *"creativity is just intelligence having fun."* - Albert Einstein

STRATEGIC BRAND PLATFORM

North Star funnels these strategic insights for the brand into a single sentence, the brand platform which can be used as a guide for creative expressions and implementation initiatives ensuring consistency and relevance.

Target Audience	For those who never stop questioning what's possible,
Frame-of-Reference	Los Alamos County, in the elevated outdoors of northern New Mexico and home to the Los Alamos National Lab,
Point-of-Difference	is where some of the world's best brains power the breakthroughs that shape our world
Benefit	so you are challenged to think bigger and live brighter.

BRAND PLATFORM RATIONALE

For those who never stop questioning what's possible

- Target Audience: A statement that reveals who will find Los Alamos County most attractive, often uncovers a characteristic of a group of people.
- Los Alamos County is a place for critical thinkers, who use their minds to their advantage, and who aren't afraid to think differently than their peers.
- Also, this Target Audience statement is individualistic, which is reflective of the community in Los Alamos County.
- By promoting Los Alamos County as a place for critical thinkers and intelligent people, this creates trust in the brand. Essentially, the brand promise will be experienced when someone visits or moves to the community.
- Additionally, this statement gives the positive impression that the County is a place of people who challenge the status quo, that consistently push the limits of their mind, body and soul. These types of individuals dream big, which connects to the Benefit statement in the Platform.

Los Alamos County, in the elevated outdoors of northern New Mexico and home to the Los Alamos National Lab,

- Frame of Reference: An easy geographic identifier – where the County is in the region. Also, sometimes this includes prominent assets that are well known in the region.
- North Star heard throughout our research that Los Alamos County wouldn't exist today without the LANL. This is the community's greatest asset and most prominent identifier, nationally. Thus, it is included in the Frame of Reference.
- Outdoor recreation was seen as a primary asset that should be given top strategic priority. Because this asset is not unique to Los Alamos County it is included in the Frame of Reference as opposed to the Point of Difference.

- Additionally, the word “elevated” describes the type of outdoor recreation one can experience in Los Alamos County. Not only is the outdoor recreation in the area at high-altitude, the word elevate also describes the type of outdoor experience a visitor or resident can have in the County. An elevated experience is one that is a bit better, more invigorating, and more authentic.
- Finally, Los Alamos County has a significant impact on the northern New Mexico region, thus this regional identifier is included in the Platform.

is where some of the world’s best brains power the breakthroughs that shape our world

- Point of Difference: what is most relevant and distinct about Los Alamos County. What is the area’s competitive advantage in the marketplace?
- The high concentration of highly intelligent, educated, skilled individuals sets Los Alamos County apart from virtually any community in the country, its size.
- Insights explored the idea of Los Alamos County’s “brain power” – the impact the community has on the area and the country. Here the phrase “brain power” has been altered slightly to break up the common phrase.
- Historically, Los Alamos County has been a destination for outstanding breakthrough in science. This tradition continues today; however, one can have a multitude of breakthroughs in the County. For example, a visitor can have a downhill skiing breakthrough. An athlete can hit a personal best on his recent 5-K. Or a business person or scientist can have a breakthrough that powers innovation and science in the region.
- Having the “best brains,” “brain power,” and “breakthroughs” in the community is an effective economic development message, a key goal for this initiative.

so you are challenged to think bigger and live brighter.

- Benefit: what’s in it for a resident, visitor, or business. The takeaway once you’ve experienced the Los Alamos County community.
- The Los Alamos County community is a place that doesn’t back down from a challenge. In fact, the community embraces a challenge as an opportunity to grow and make an impact.
- In Los Alamos County, by thinking bigger, your life is brighter.
- This Benefit statement is also a call to action for newcomers, residents, and businesses. It’s a challenge to think bigger, don’t accept the status quo and to live a bright life full of energy, passion, and growth.

HOW IS THE BRAND PERFORMING?

Evaluation yields new information which may lead to the beginning of a new planning cycle. Information may be gathered from concept pre-testing, campaign impact in the marketplace and tracking studies to measure a brand's performance over time.

Ideally, two basic questions will be answered: Have responses to the brand among target audiences changed in the way the BrandPrint intended? And have these changes resulted in consumer action that will achieve the desired objectives of the brand? Turnkey or do-it-yourself programs are recommended depending on the needs of the community.

To begin the process of brand evaluation, North Star has set up a schedule to discuss Los Alamos County's brand progress. This schedule begins immediately after the delivery of your BrandPrint.

- Immediately – North Star recommends that Los Alamos County focus efforts on growing its inquiry and visitor database for both visitors and business prospects. In addition, the County should continue to add to its resident database of email addresses. Los Alamos County should also establish an email database of the business community in the County.
- Six months – North Star's Research Director will conduct an assessment call to outline a plan for measuring brand performance moving forward
- One year – Los Alamos County will be contacted to determine specific measurement goals including re-measuring awareness and perception of the community amongst intended audiences.

Building your databases and keeping them current ensures future success measurements can be calculated. These leads will be the best data start point for future brand evaluation.

As stated above, North Star will consult with the community at the above times to evaluate your specific needs. Keep in mind that many of the research pieces in your BrandPrint were created to act as benchmarks by which future improvements can be measured. Based on what we now know of the community, likely recommendations for success measurements at Los Alamos County's one-year mark may include:

- Resident and Visitor Tapestry Profile Who and What Reports
- Community Brand Barometer
- Online Community-wide Survey
- Consumer Awareness and Perception Study

LOS ALAMOS COUNTY TAPESTRY PROFILE STUDY

Purpose

A Community Tapestry Study is conducted to understand the target audience's lifestyle in detail. This included profiling reports for Los Alamos County residents and the Regional Profile – five county region including Santa Fe, Rio Arriba, Taos, Sandoval, and Bernalillo Counties.

Methodology & Results

Tapestry represents the fourth generation of market segmentation systems that began 30 years ago. This powerful tool classifies U.S. neighborhoods by lifestage and lifestyle in addition to traditional demographics.

The results from the Tapestry studies can be classified into two main reports:

- **Who Report:**
 - Profiles the demographic and lifestyle segmentation of the population
 - Classifies the population in each of the ways outlined above and indexes the population under study against national averages

- **What Report:**
 - Provides a detailed profile of the core population for 37 separate lifestyle and media groups in over 2,200 sub-categories
 - Each category is indexed against the average U.S. resident to determine whether a member of the population under study is more or less likely to exhibit the specific behavior (100 represents the national average)

Key findings from the Community Tapestry reports allow for greater understanding of your residents and consumer groups. The more you understand about your target audiences, the better you can target your message to them.

Timing

The Community Tapestry Study should be conducted every one-to-three years.

LOS ALAMOS COUNTY COMMUNITY BRAND BAROMETER

Purpose

The Community Brand Barometer measures strength of the Los Alamos County brand according to:

- Resident satisfaction/advocacy with the brand as a place to live, work and visit
- Brand satisfaction/advocacy relative to the nation.

Methodology & Results

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants answer three questions:

- Would you recommend living in Los Alamos County to a friend or colleague?
- Would you recommend visiting Los Alamos County to a friend or colleague?
- Would you recommend conducting business in Los Alamos County to a friend or colleague?

Resident advocacy is one of the strongest measures of brand success. Successful brand implementation will energize the resident base, making them more likely to recommend their community to others.

Timing

The Community Brand Barometer should be conducted annually. The first Brand Barometer should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

See **Appendix D** for additional information.

LOS ALAMOS COUNTY ONLINE COMMUNITY-WIDE SURVEY

Purpose

The purpose of the Online Community-wide Survey is to gain a quantitative measure of the community's perceptions of Los Alamos County.

Methodology & Results

This qualitative survey is fielded online and is open to all residents of the community. The study measures the following:

- Overall top-of-mind perceptions of Los Alamos County
- Strengths and weaknesses of Los Alamos County
- Resident suggestions on what is missing from Los Alamos County
- Measurements of Los Alamos County quality of life indicators

Positive resident perceptions are a strong indicator of brand success. Successful brand implementation will energize the resident base, making them more likely think of the community in a positive light.

Timing

The Online Community-wide Survey should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

CONSUMER AWARENESS AND PERCEPTION STUDY (CAP STUDY)

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation and perceptions of Los Alamos County.

Methodology & Results

This quantitative survey is fielded online outside of Los Alamos County's borders in order to obtain an outsider's perspective. The survey measures:

- Overall top-of-mind perceptions of Los Alamos County and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends and family)
- Strengths and weaknesses of Los Alamos County identified within community attributes
- Consumer suggestions on what is missing from Los Alamos County
- Measurements of Los Alamos County delivery of hospitality
- Measurements of Los Alamos County quality of life indicators

Timing

The CAP Study should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).