

LOS ALAMOS COUNTY BRANDPRINT UPDATE

April 2014

The following document is meant to detail the individual research pieces conducted by North Star destination strategies on behalf of Los Alamos County, NM. A total of 8 research studies were completed with a primary goal of understanding the internal and external perceptions of Los Alamos County.

While North Star's process employs a combination of traditional research tools including online searches and surveys, telephone surveys and focus groups to collect data—opinions, perceptions, feedback, awareness, familiarity—to uncover what's most relevant and distinct about Los Alamos County, the nature of the data is essentially subjective. Therefore, small changes in percentage points in the research do not yield a great deal of change in the overall perception or opinion of Los Alamos County. The following is a recap of the research studies completed:

Community Research: The following research pieces were conducted to gather *internal* perceptions of the County from residents, stakeholders, and businesses.

- Communications & Materials Audit – a thorough collection of all research and communications pieces were given to North Star for review such as area visitor guides, Los Alamos County and organization websites, LACDC materials, local real estate guides, economic development material, and much more.
- In-Market Study – North Star traveled to Los Alamos County on March 12-14, 2013 to conduct Familiarization Tours of the area, one-one-one interviews with key stakeholders, and focus groups with area residents, businesses and organization leaders.
 - 6 Focus Groups or meetings (over 50 individuals were engaged in these meetings and focus groups) with County staff, Chamber businesses, area residents, culture and arts representatives, and more.
 - 9 One-on-one stakeholder meetings with County Councilors, White Rock representatives, Downtown and Chamber representatives.
 - *Quick summary of findings:* Conversations showed that the National Lab is the primary economic driver for the County although some worry that the County's economy relies too heavily on the Lab for future growth. Others mentioned the abundance of outdoor recreation and access to nearby attractions like Bandelier National Monument, Pajarito Ski Mountain, and the Valles Caldera as primary assets for the County. Quality education, safety, and strong culture and arts make Los Alamos County a great place to live. Some conversations highlighted the need to attract commuters to live in LAC but expensive housing and lack of entertainment, nightlife, and retail/restaurants keeps some from calling the County home.

- Online Community-Wide Survey – This survey was conducted as an extra research piece (not included in the contract) to reach the general population of Los Alamos County. North Star felt it was necessary to field this survey as part of the research. The Online Community Survey was promoted online, through social media, through traditional media channels, and through word-of-mouth.
 - A goal of 200 completed surveys is typical for this survey; however, North Star along with County Staff collected 703 surveys, a fantastic response rate!
 - Statistical Significance: +/- 3.62 at the 95% confidence level.
 - *Quick summary of findings:* Top adjectives were identified as educated, quirky, run-down, intelligent, and affluent. In fact, these adjectives were themes recurring in North Star’s research. Interestingly, outdoor recreation scored higher than the National Lab as the County’s greatest asset but both were identified as most important to the County’s identity. Challenges revealed similar findings from the In Market Study but also revealed an over-analyzing of plans and decisions as being a hindrance to future development. Safety and educated workforce rated highest in community offerings and diversifying the economy was shown as a top opportunity for the area.

- Community Brand Barometer – The Brand Barometer measures the strength of the Los Alamos County brand according to resident satisfaction and advocacy for LAC as a place to live, visit and work. Also, the satisfaction levels are compared to national average scores.
 - The Brand Barometer question reads: “On a scale of 1 to 10, with 10 being highly likely, how likely would you be to recommend living, visiting, and conducting business in Los Alamos County to a friend or colleague?”
 - This is the 1st question on the Community Survey; therefore 703 responses were collected with a statistical significance of +/- 3.62 at the 95% confidence level.
 - *Los Alamos County scored third highest in North Star’s community Brand Barometers for 2013 as a place to visit out of 50+ other communities. Los Alamos County scored 2.7x the National Average. Congratulations!*

- Community Tapestry Research – A resident profile was created to understand, in great detail, resident shopping patterns, media preferences, behaviors, lifestyles, preferences and affluence levels. A great deal of data was collected using the Tapestry system of geo-demographic research.
 - Resident Profile – the geographic boundaries of Los Alamos County were used to determine (with County approval) the different types of people who live in the County.
 - Using data pulled from various sources like shopper loyalty cards, credit card data, census information and more, Tapestry identifies the types of people who live at each address across the county and synthesizes information to paint a geo-demographic picture of the County.
 - Because the Tapestry data is considered secondary research, a statistical significance number cannot be provided. However, Tapestry is considered an industry-leading provider of geo-demographic research and is updated on an annual basis.
 - *Quick summary of findings:* The Resident Profile showed the County’s residents as being highly affluent. The top five segments of the County’s population show a focus on pursuing an active lifestyle with yoga, hiking, running and other outdoor activities a top priority. Additionally, travel, both international and domestic, are key behaviors as well as seeking personal growth through reading and going to museums.

Consumer Research: The following research pieces were conducted to gather *external* perceptions of the County from regional residents, visitors and non-visitors, regional and state level professionals in economic development, tourism as well as site selectors, developers and more.

- Community Tapestry Research – A regional profile was identified to comprehend, in great detail, regional resident’s shopping patterns, media preferences, behaviors, lifestyles, preferences and affluence levels.
 - Regional Profile – along with County staff assistance, North Star identified a region of outsiders likely to visit or be attracted to Los Alamos County. The following counties were selected for the Regional Profile: Santa Fe, Rio Arriba, Taos, Sandoval, and Bernalillo Counties.
 - *Quick summary of findings:* Because the geographic area is much broader, the preferences and lifestyles vary greatly. The top five segments are slightly more affluent than the national average. For this profile, residents value convenience likely due to their fast paced lives. These residents are practical, pay careful attention to budgets and penny-pinching, and value time together as family and friends.

- Outside Perception Study – The purpose of this study was to gain insight from individuals who work in Los Alamos County but commute to the area for work, or work outside of Los Alamos County but have some familiarity with the area. Using county email databases and leveraging area contacts, North Star fielded an online study to gather perceptions from these individuals.
 - Due to privacy policies observed by the Lab, the Los Alamos Chamber of Commerce and other businesses/organizations, the online survey was made available via mass e-mail to many organizations, potentially impacting rate of response.
 - 79 responses were collected, primarily from the County’s largest employer, the Los Alamos National Lab; thus, the results reflect the interests and perspectives of Lab employees that live outside Los Alamos County.
 - *Quick summary of findings:* Although a low response count was collected, this survey did shed some light on how employees at the National Lab view the County. These findings showed the majority of respondents come from Santa Fe and would describe the County as well-educated, quirky, and perhaps a bit condescending and physically run-down. Most prefer to live outside of Los Alamos County because it can be seen as expensive and lacking entertainment amenities. Respondents also revealed that spin-off businesses from the Lab as well as other scientific and national defense industries are well suited for the County, while others showed a need for outdoor recreation outfitters in the area. The area’s proximity to a premier research facility and highly educated workforce are top strengths for the area to attract business growth. Some of this research was confirmed in the CAP Study, detailed below.

- Consumer Awareness and Perception Study (CAP STUDY) - The purpose of this study is to gain insight into consumer awareness, familiarity, visitation, and perceptions of the Santa Fe, NM and Albuquerque, NM areas.
 - An online survey was conducted in the above markets using a third-party survey distribution provider. 200 is the target number of respondents for this survey, and 210 surveys were collected.
 - Statistical Significance: +/-6.76 at the 95% confidence level.
 - *Quick summary of findings:* 82% of respondents were somewhat familiar with LAC while 18% were very familiar with the area. Reiterating themes of the research, outsiders are most likely to describe the County as educated/intelligent, affluent, quirky, and being an outdoor recreation destination. However, adjectives like arrogant or run-down were much further down in the list of adjectives, suggesting outsiders don't view the area in these ways. A "center for science and technology" and "educated, intelligent population" were the highest rated perceptions of the County. 96% of respondents had visited the County. Of those visitors, exploring area assets like Bandelier and Valles Caldera were top reasons for visiting along with conducting business. Additionally, the level of workforce education and quality of workforce were top rated business attributes for the County.

- Perception Study - 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. From a list of roughly 25 contacts provided by County staff, telephone interviews were conducted and targeted regional economic development professionals, tourism industry contacts, competitor communities and developers.
 - Statistical significance cannot be given because this was a qualitative research piece. Therefore percentages were not included in the findings.
 - *Quick summary of findings:* Most respondents described the area as educated, full of scientists along with interesting and isolated. Others described the County as having the highest income level in the state and high tech. Many research themes were reiterated throughout the Perception Study; however, new perceptions were identified, like having lots of potential for the future and the County being a tourism hub for northern New Mexico. Outsiders see new opportunities as well for the County like "outside of the box" architecture, and developing interpretive material for tourists and visitors. When asked about the educated population in Los Alamos County, one respondent described the community as a "think tank."

Competitor Research: The following research piece was conducted to understand Los Alamos County competitors in greater detail. Throughout the surveys, North Star collected research pertaining to the County's competitors in addition to the analysis below.

- Competitive Analysis – This piece is conducted to better understand area competitor brands. By reviewing their online presence, straplines, brand elements, marketing messages, and visuals used, North Star then uses this information to ensure that the brand identity for Los Alamos County is distinct in the marketplace.
 - Economic Development and Tourism Competitors: These competitors were identified by County Staff as key competitor markets.
 - Bernalillo County, NM
 - Santa Fe County, NM
 - Sandoval County, NM
 - Boulder County, CO
 - Coconino County, AZ
 - Jefferson County, CO
 - National Lab Community Competitors: these communities were added to the list to better understand how communities with large national labs promote this asset.
 - Oak Ridge, TN
 - Tri-Cities, Washington

REVIEW OF INSIGHTS: Insights showed there is a defining characteristic of the area that 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. However, these intelligent residents, businesspeople, and consumers need a place to let loose and let off some steam. The outdoor recreation and surrounding assets like the Bandelier National Monument and others are fertile ground for these types of quality of life activities. And leveraging this access to outdoor recreation was a highlighted opportunity for the County in the future. 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.

BRAND PLATFORM STATEMENT: 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. This is NOT ad-copy and is not a creative 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.

PLATFORM RATIONALE:

- 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.
- 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.
- 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 better, more invigorating, and more authentic.
- The “brain power” in Los Alamos County describes the impact the community has on the area and the country.
- Historically, Los Alamos County has been a destination for outstanding breakthroughs 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.
- 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.

CREATIVE DEVELOPMENT:

Using the Platform above, North Star, along with a small Creative Committee has worked to develop the foundational elements of the brand identity. Drawing inspiration from the Brand Platform a creative concept was born.

- The Creative Committee chose the Written Concept—a narrative that tells the story of Los Alamos brand—that will be presented at the May 6th Council meeting.
- The Creative Committee also selected the strapline, like a tagline or slogan, but with a larger, long-lasting purpose. The strapline is: ***Los Alamos County...Live Exponentially.***
- This strapline connects to the Brand Platform above while also providing a mechanism to connect to all facets of the community. Rationale for the strapline is below:
- This strapline centers on the word, “exponentially.” This word is ideal for Los Alamos County because:
 - “exponentially” gives the feeling that life in the County is elevated and raised, that life is great, and the County is for those that want the most out of life
 - “Exponentially” is an element found in science, mathematics, and engineering. This word is on-strategy and will resonate with key target audiences
 - “Exponentially” allows for a visual mechanism in the brand to help this concept come to life.
- Residents and businesspeople in Los Alamos County aren’t thrill seekers; however, they do push the status quo. They never stop questioning the boundaries of science, the boundaries of their personal life, and the boundaries of health, activity, leisure, and time with family. It’s an innate desire to learn and to grow, and this strapline encompasses this sentiment.
- This concept does a nice job of capturing the essence of the Platform benefit statement, think bigger and live brighter.
- Finally, this strapline is perfect for a community-wide branding effort because the word “live” can be substituted for various words to connect with all types of audiences. For instance the strapline can be tweaked as below in different ways, the possibilities are endless:
 - For a workforce development message: Los Alamos County...“Work Exponentially.”
 - For students in the local schools or for scientists at LANL: Los Alamos County... “Think Exponentially.”
 - For outdoor fun: Los Alamos County... “Play Exponentially.”
 - For trail runners: Los Alamos County... “Run Exponentially.”
 - For a local brewery: Los Alamos County... “Brew Exponentially.”
 - For local bands and music functions: Los Alamos County... “Jam Exponentially.”
 - Or, for local painters and artists: Los Alamos County... “Create Exponentially” or “Imagine Exponentially.”
- This strapline can be further tweaked to connect with existing events and assets, for instance, the “Los Alamos ScienceFest” (formerly known as the “Next Big Idea Festival”) now has a tagline: “Unleash Your Creative Genius—Exponentially!”