



  
**New Hampshire**

LIVE FREE

**2023-2024 Winter  
Advertising Effectiveness Research**

May 2024

**SMARInsights**

# Background & Objectives

- The New Hampshire Division of Travel and Tourism Development (DTTD) runs annual winter advertising in select markets. The 2023-2024 winter advertising ran in the core U.S. markets, other U.S. markets, Montreal, and Quebec City.
- DTTD has retained Strategic Marketing & Research Insights (SMARInsights) to conduct research to measure awareness and influence of the advertising. The research is also designed to uncover insights that guide strategic decision-making.
- The specific objectives of this research are to:
  - Measure awareness of the winter advertising;
  - Evaluate the efficiency of the media investment;
  - Explore the overall reaction to the campaign elements;
  - Determine the advertising's ability to communicate desired messages and generate interest in New Hampshire winter travel;
  - Assess the ability of the winter advertising to influence New Hampshire winter travel;
  - Calculate the return on investment of the advertising; and
  - Forward insights into future refinement of the marketing.

# Methodology

- As with prior advertising effectiveness research conducted for DTTD, an online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- Respondents were screened to be travel decision makers age 18 to 65 who regularly take overnight leisure trips of at least 50 miles from home. They are also required to have interest in winter vacations that involve skiing, snowboarding, snowmobiling, snowshoeing, or other outdoor winter activities. These consumers are referred to as “snow travelers” in the report.
- A total of 1,205 surveys were completed between April 12<sup>th</sup> and 28<sup>th</sup>, 2024.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population distribution.
- The following report summarizes the research results.

Market		Completed Surveys
Core U.S.	NH	100
	MA	201
	RI	100
	ME	100
Other U.S.	CT	100
	NY	304
Canadian	Montreal	200
	Quebec City	100
<b>Total</b>		<b>1,205</b>

# Advertising Campaign Summary

Medium	2018-2019 Winter	2019-2020 Winter	2020-2021 Winter	2021-2022 Winter	2022-2023 Winter	2023-2024 Winter
Video (TV/CTV)	\$96,420	\$88,395	\$80,000	\$104,776	\$107,679	\$191,025
Print	\$5,000	\$0	\$31,475	\$31,475	\$42,917	\$45,032
Out of Home	\$116,205	\$109,816	\$38,640	\$68,620	\$102,170	\$94,318
Digital (Display, Social, SEM)	\$227,000	\$219,964	\$206,693	\$159,600	\$154,000	\$208,013
<b>Total</b>	<b>\$444,625</b>	<b>\$418,175</b>	<b>\$356,808</b>	<b>\$364,471</b>	<b>\$406,766</b>	<b>\$538,388</b>

- The winter 2023-2024 campaign marks a continuation of the “Discover Your New” campaign that was first used in winter 2020-2021.
- DTTD invested \$538,388 in the 2023-2024 winter advertising tested in this research, up from \$406,766 in winter 2022-2023.
- Samples of the ads are shown to the right. The full collection of assets tested is in the questionnaire in the Appendix.
- *It should also be noted that some **new media types** were tested this year. Namely, this is the first time to test **social influencer, SEM, rich media, and event** (Snowbound Expo) marketing.*

Sample Video Ad



Sample Print Ad



Sample Out of Home Ad



Sample Digital Display Ad



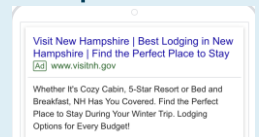
Sample Social Influencer Ad



Sample Paid Social Ad



Sample SEM Ad



Sample Rich Media Ad



Snowbound Expo



# Media Investment by Market

	Market	Print	TV	CTV	OOH	Digital Display	Ad Serving	Paid Social	Influencers	SEM	Total
Core U.S.	NH	\$7,505	\$0	\$0	\$0	\$17,429	\$261	\$8,438	\$3,617	\$5,000	\$42,249
	MA	\$7,505	\$116,025	\$60,000	\$83,950	\$17,429	\$261	\$8,438	\$3,617	\$7,750	\$304,974
	RI	\$7,505	\$0	\$15,000	\$10,368	\$17,429	\$261	\$8,438	\$3,617	\$7,750	\$70,367
	ME	\$7,505	\$0	\$0	\$0	\$17,429	\$261	\$8,438	\$3,617	\$0	\$37,249
Other U.S.	CT	\$7,505	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,750	\$14,255
	NY	\$7,505	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$6,750	\$14,255
Canadian	Montreal	\$0	\$0	\$0	\$0	\$13,642	\$261	\$6,000	\$3,617	\$4,000	\$27,519
	Quebec City	\$0	\$0	\$0	\$0	\$13,642	\$261	\$6,000	\$3,617	\$4,000	\$27,519
	Total	\$45,032	\$116,025	\$75,000	\$94,318	\$97,000	\$1,563	\$45,750	\$21,700	\$42,000	\$538,388

- Massachusetts received all ad media and the largest investment of any market by a wide margin.

# Insights

There was a lot of rain but not much snow this winter in New Hampshire, which has historically been one of the snowiest states in the country. Even when New Hampshire got a few inches of powder this year, it didn't stick around long. A changing climate is having a big effect on temperatures, which then has a ripple effect on snowfall. Mary Stampone, the New Hampshire state climatologist, said “As you have the winter season warming, we’re going to get more of that precipitation falling as rain – or rain on snow – and have more frequent melt events within the season, rather than having a continuous snowpack that slowly melts in the spring.”

DTTD partnered with SMARInsights to conduct advertising effectiveness research on the 2023-2024 winter advertising campaign. Insights from this research include:

- The 2023-2024 winter advertising generated 56% awareness, reaching about 2.5 million snow traveling households.
- Ad awareness and ad-aware households declined compared to last year despite a larger media investment. The declines are likely driven to some degree by lack of snowfall and a less engaged audience. There were also fewer target households this year, as DTTD traded Toronto for Quebec City.
- Social influencer, SEM, rich media, and event marketing were tested for the first time in this research. These new media accounted for 14 percentage points of total ad awareness (without these media, ad awareness would have been 42%). This underscores that it was difficult to generate awareness this year due to poor snow conditions – and that it is important to test a comprehensive collection of advertising media to arrive at a representative measure of awareness.
- Social influencer content is an effective way to generate efficient reach, especially among a targetable and engaged audience like snow travelers. This content is also well-received, with an 87% positive reaction.
- Winter ad awareness continues to be higher among younger consumers, but DTTD has made progress in reaching Boomers due in large part to investing more in video advertising.

# Insights cont.

- The winter advertising continues to generate strong ratings, but there were some year-over-year declines, which could result from creative featuring pristine snow conditions when the actual conditions are poor. Ad wear-out could also be contributing to ratings declines, as this campaign has been running since winter 2020-2021.
- The 2023-2024 winter advertising ultimately influenced New Hampshire winter travel from the U.S. markets, but not from the Canadian markets. In addition to the poor snowfall, the Canadian markets had the added challenge of an unfavorable exchange rate.
- The advertising influenced about 64,000 trips resulting in about \$83 million in visitor spending and \$6.0 million in tax revenue. Given the media investment of \$538,388, the advertising returned \$153 in visitor spending and \$11 in taxes for each \$1 invested.
- The 2023-2024 ROI and tax ROI are the second-lowest of the past five years, above only the COVID-suppressed winter 2020-2021 results. These results show how vulnerable tourism is to uncontrollable forces, whether they are pandemics or poor weather or unfavorable exchange rates.
- The advertising continues to influence more active, longer, better trips. But overall, the poor snow conditions led to shorter, less active trips with less social sharing than last year.

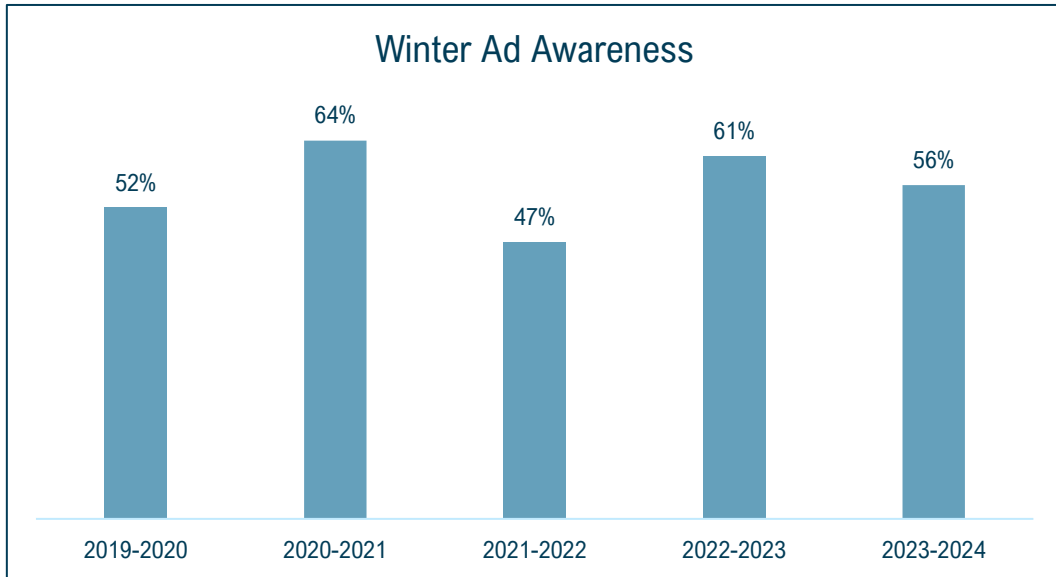
# Advertising Awareness

A photograph of three skiers ascending a steep, snow-covered mountain slope. The skiers are wearing winter gear and carrying skis on their backs. The scene is set against a backdrop of a clear blue sky and snow-covered peaks. The image is overlaid with a semi-transparent blue filter and a white diagonal line that separates the main image from the logo area on the right.

**SMAR**insights



# Winter Ad Awareness & Cost per Aware HH



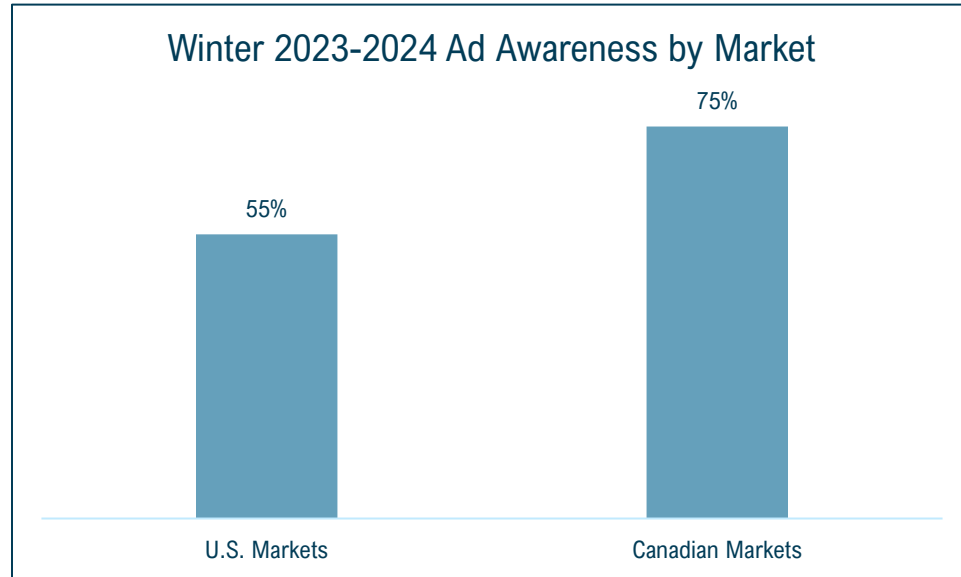
	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
*Targeted HHs	6,433,066	1,927,786	12,725,929	5,519,065	4,474,498
Ad Awareness	52%	64%	47%	61%	56%
Ad-Aware HHs	3,370,926	1,228,398	5,933,788	3,371,419	2,515,898
Media Investment	\$418,175	\$356,808	\$364,471	\$406,766	\$538,388
<b>Cost per Aware HH</b>	<b>\$0.12</b>	<b>\$0.29</b>	<b>\$0.06</b>	<b>\$0.12</b>	<b>\$0.21</b>

\*Target HHs differ by year due to markets and winter travel incidence

- The 2023-2024 winter advertising generated 56% awareness among snow travelers in the target markets. This equates to about 2.5 million ad-aware target households.
- Ad awareness and ad-aware households declined compared to last year despite a larger investment. This decline is likely driven to some degree by a less engaged audience during a winter with lackluster snowfall. There were also fewer target households this year, as DTTD traded Toronto for Quebec City – and the incidence of qualified snow travel was lower given the poor snow season.
- Still, the media investment is more efficient than average based on SMARInsights’ cost per aware household norms.



# 2023-2024 Winter Ad Awareness U.S. and Canada

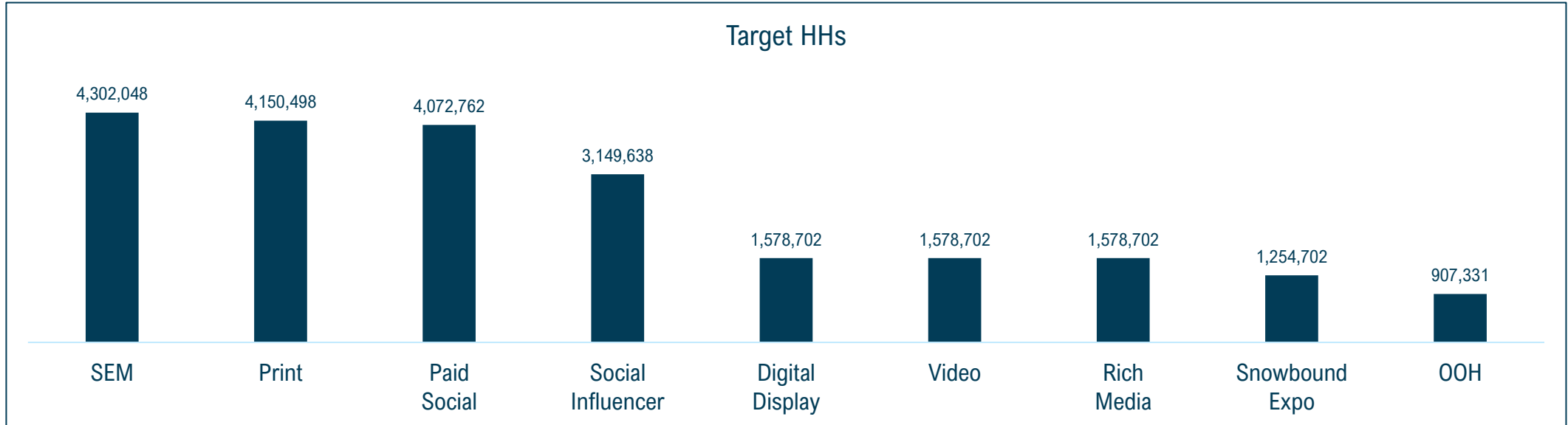


	U.S. Markets	Canadian Markets
Targeted HHs	4,150,498	324,000
Ad Awareness	55%	75%
Ad-Aware HHs	2,271,432	244,466
Media Investment	\$483,350	\$55,038
<b>Cost per Aware HH</b>	<b>\$0.21</b>	<b>\$0.23</b>

- The advertising generated 55% awareness in the U.S. markets and 75% awareness in the Canadian markets.
- The Canadian awareness figure might seem surprisingly high given the modest investment, but snow travelers are a small and targetable audience. Anecdotally, recent focus groups conducted among Canadian consumers suggested widespread awareness of New Hampshire travel advertising.
- Moreover, the cost per aware household was higher in Canada than in the U.S.

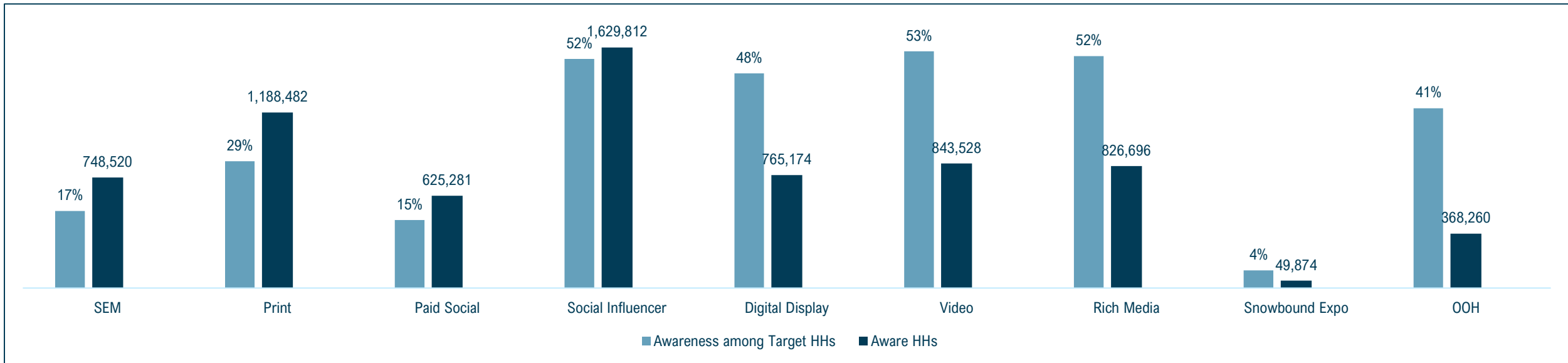
# Target Households by Medium

- Several winter ad media were employed and aimed at different markets or consumer groups.
- The graphics here summarize the target household counts for each ad medium.



Markets	All markets except Maine	All U.S. Target Markets	Use Facebook or Instagram	Use Instagram	NH, MA, RI, ME, Canada	NH, MA, RI, ME, Canada	NH, MA, RI, ME, Canada	NH, MA, RI, ME	MA, RI
Sample Ad									

# 2023-2024 Winter Ad Awareness by Medium



- The winter 2023-2024 video, rich media, and social influencer ads generated the highest awareness of the various media employed.
- The social influencer content had the broadest reach, as these ads were aimed at Instagram users in all markets. Instagram usage is 70% among this snow traveler audience. Instagram usage in the U.S. overall is 50%, indicating that social media is a good way to reach snow travelers.
- Interestingly, the paid social advertising generated much lower awareness than the influencer content despite a larger investment. Social influencers seem to be a good way to generate efficient reach, especially among a targetable and engaged audience like snow travelers. More on cost per aware household by medium is shown on the following slide.

# Cost per Aware HH by Medium

	Print	SEM	Digital Display	Video	OOH	Social Influencer	Paid Social
Target HHs	4,150,498	4,302,048	1,578,702	1,578,702	907,331	3,149,638	4,072,762
Ad Awareness	29%	17%	48%	53%	41%	52%	15%
Ad-Aware HHs	1,188,482	748,520	765,174	843,528	368,260	1,629,812	625,281
Media Investment	\$45,032	\$42,000	\$97,000	\$191,025	\$94,318	\$21,700	\$45,750
<b>Cost per Aware HH</b>	<b>\$0.04</b>	<b>\$0.06</b>	<b>\$0.13</b>	<b>\$0.23</b>	<b>\$0.26</b>	<b>\$0.01</b>	<b>\$0.07</b>

- The efficiency of the social influencer content investment is evident in a low cost per aware household.
- Video and out-of-home are the most expensive media in terms of cost per aware household. The video cost per aware household is slightly better than SMARInsights' norm for this medium (\$0.27). Out-of-home is less efficient than the norm (\$0.11).

# Social Influencer Ad Awareness

Awareness of content from two social media influencers were tested:

- Jacqueline K
- Traveling Mainers

- Both sets of content generated 44% awareness among Instagram users.
- There is a great deal of awareness overlap between these two influencers; the total combined awareness is 52%.

## Social Influencer Content Awareness

44%



Aware of any  
Jacqueline K  
Social Influencer Content

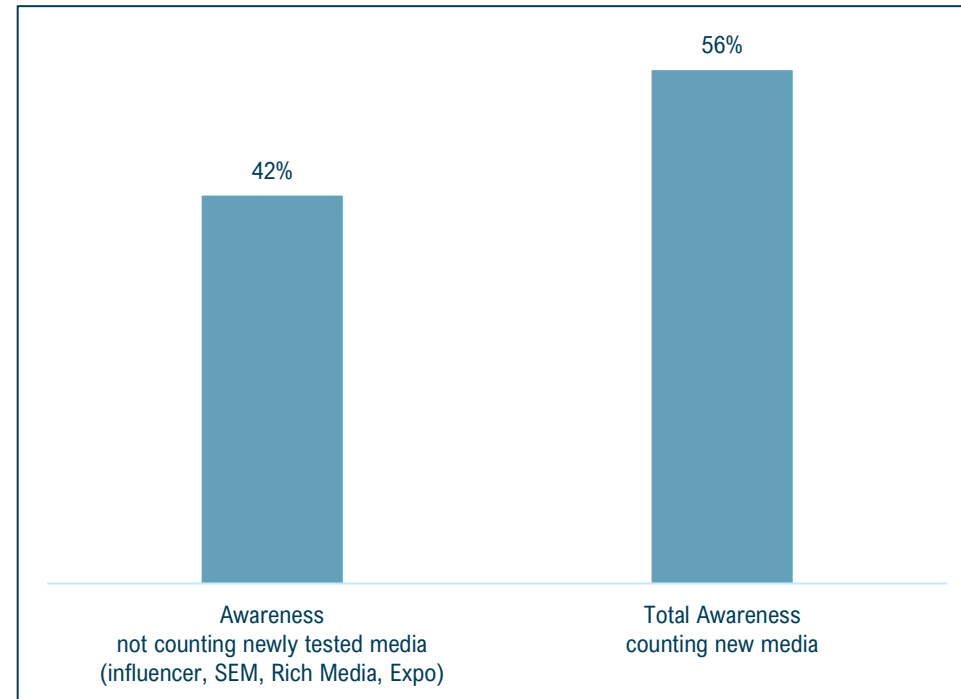
44%



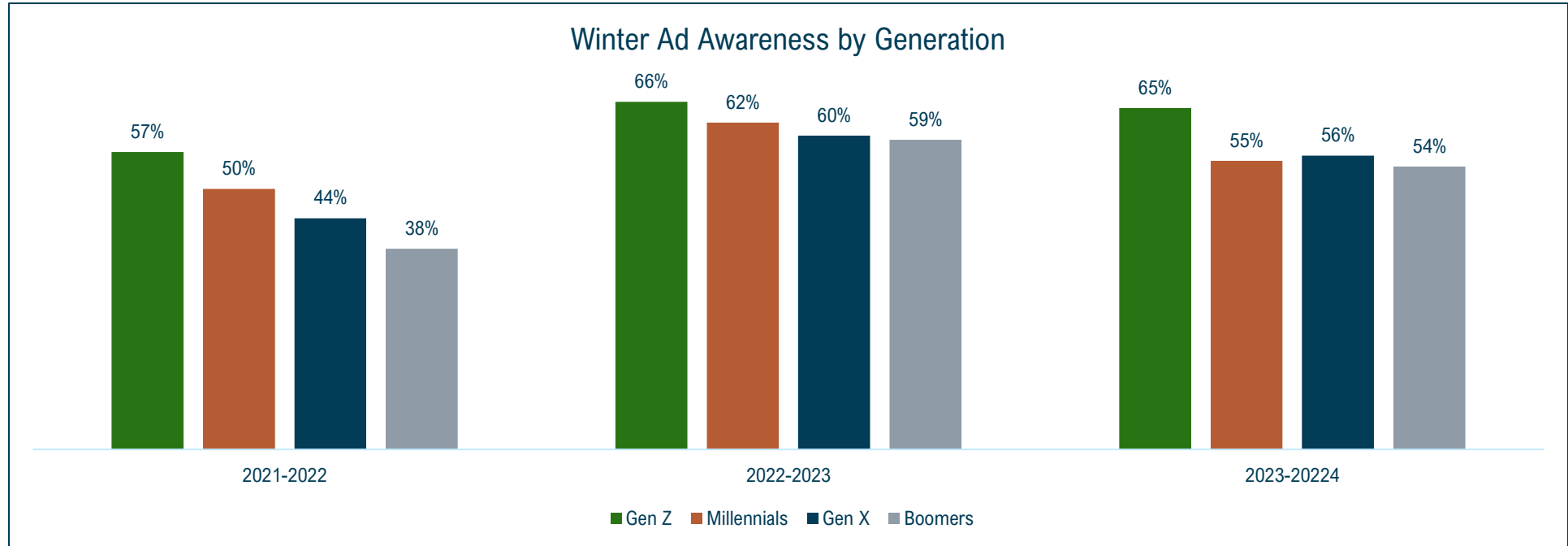
Aware of any  
Traveling Mainers  
Social Influencer Content

# New Media Contribution

- As noted in the Advertising Campaign Summary slide, this 2023-2024 winter research is the first time we have tested social influencer, SEM, rich media, and event (Snowbound Expo) marketing.
- These new media accounted for 14 percentage points of total ad awareness. In other words, ad awareness would have been much lower this year if these new media were not included.
- This underscores a couple of things:
  - It was more difficult to generate awareness this year due to lackluster snow conditions.
  - It is important to test a comprehensive collection of advertising media to arrive at a representative measure of awareness.



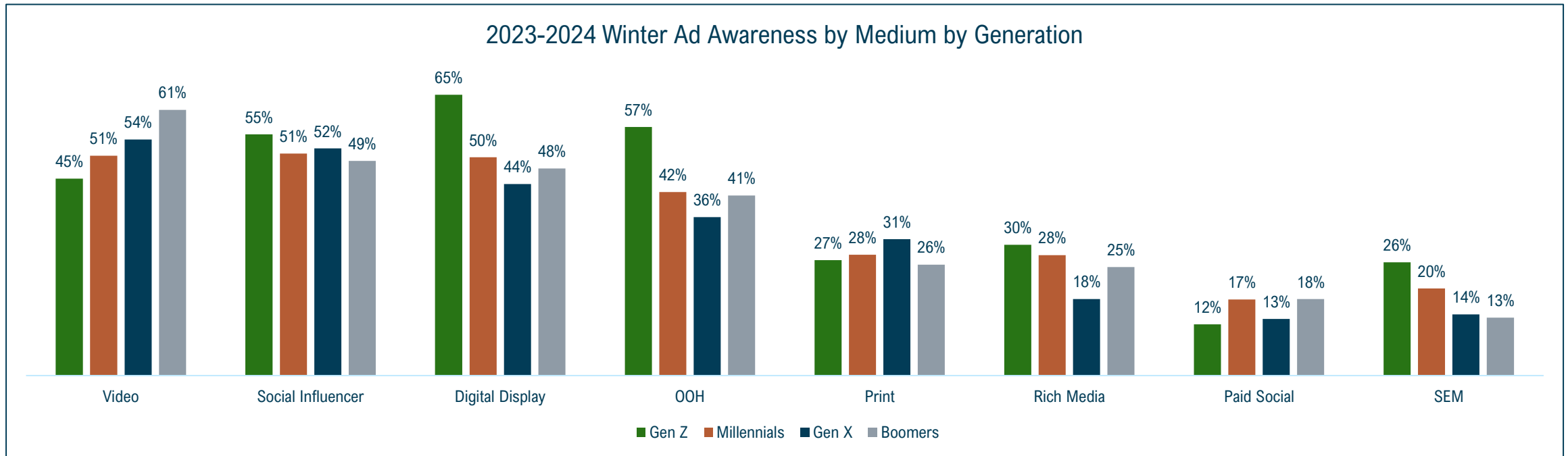
# Winter Ad Awareness by Generation



- Winter ad awareness continues to be higher among younger consumers, but DTTD has made progress in reaching Boomers. This is in large part due to investing more in video advertising, as indicated on the following slide.



# Winter Ad Awareness by Medium by Generation



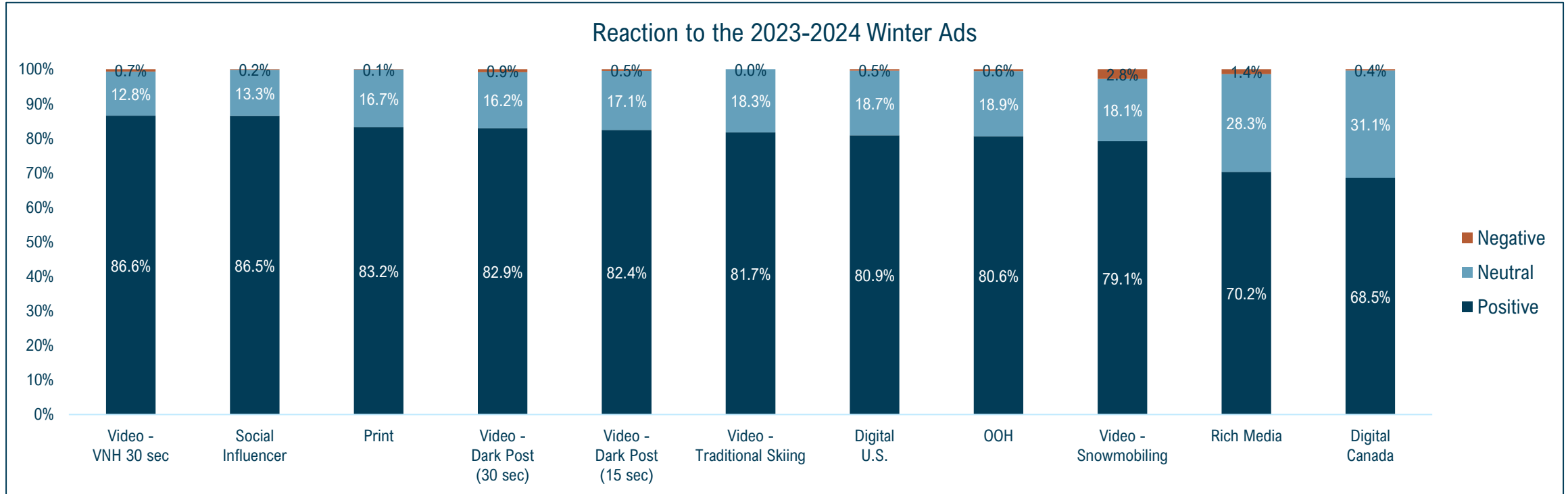
- Video ad awareness is highest among Boomers.
- Awareness of most other media is highest among the younger generations.

# Creative Evaluation

A photograph of three skiers ascending a steep, snow-covered mountain slope. The skiers are wearing winter gear and carrying skis on their backs. The scene is set against a backdrop of a clear blue sky and snow-covered peaks. The image is overlaid with a semi-transparent blue gradient and a white diagonal line.

**SMAR**insights

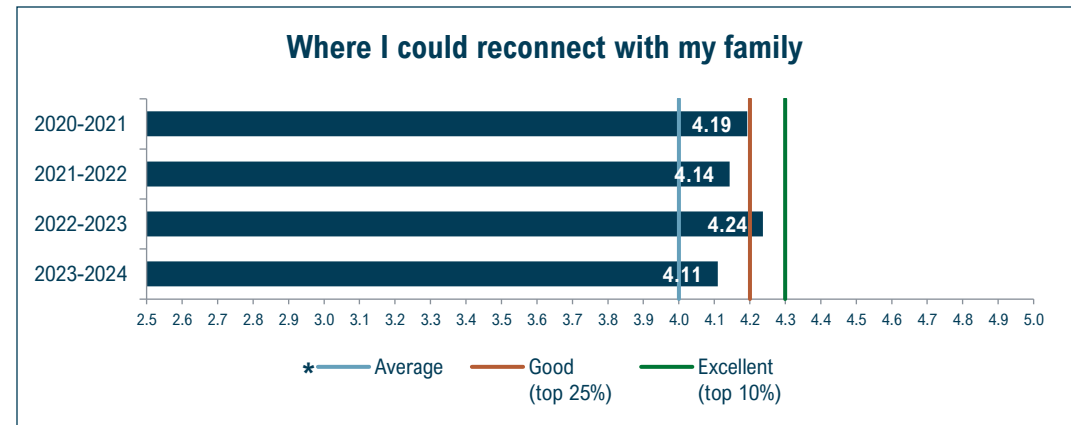
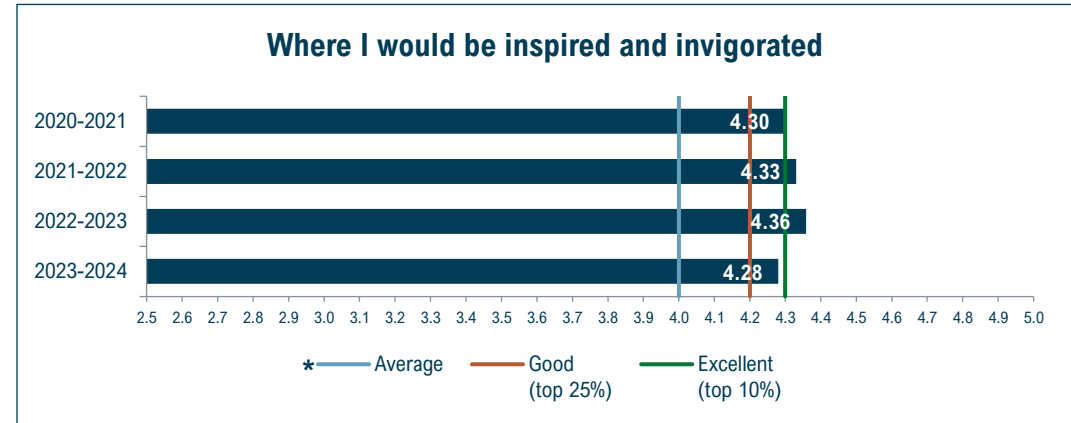
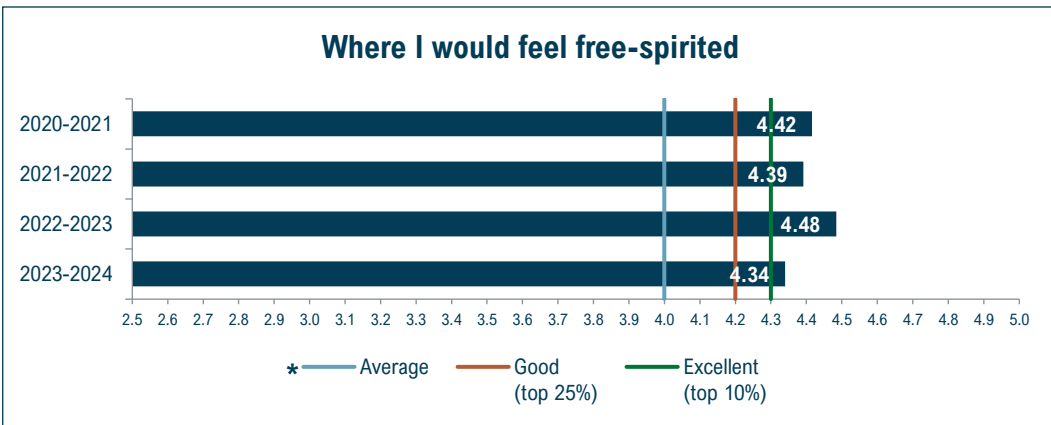
# Reaction to the 2023-2024 Winter Ads



- Reaction to the 2023-2024 winter advertising is mostly positive, and there are almost no negative reactions.
- The social influencer content is among the top performers in this regard. This medium not only generated efficient reach, but it also resonates with snow travelers.

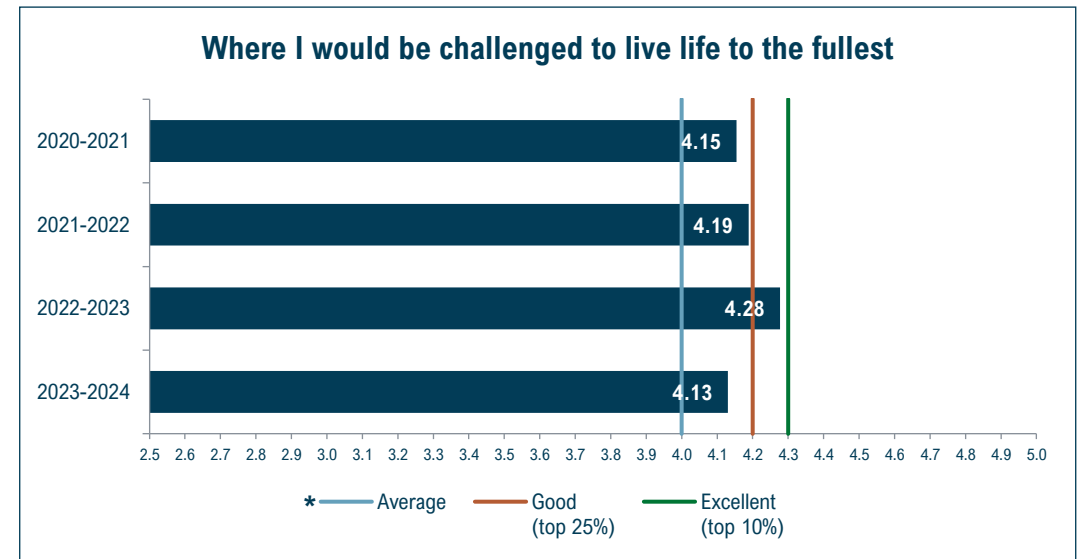
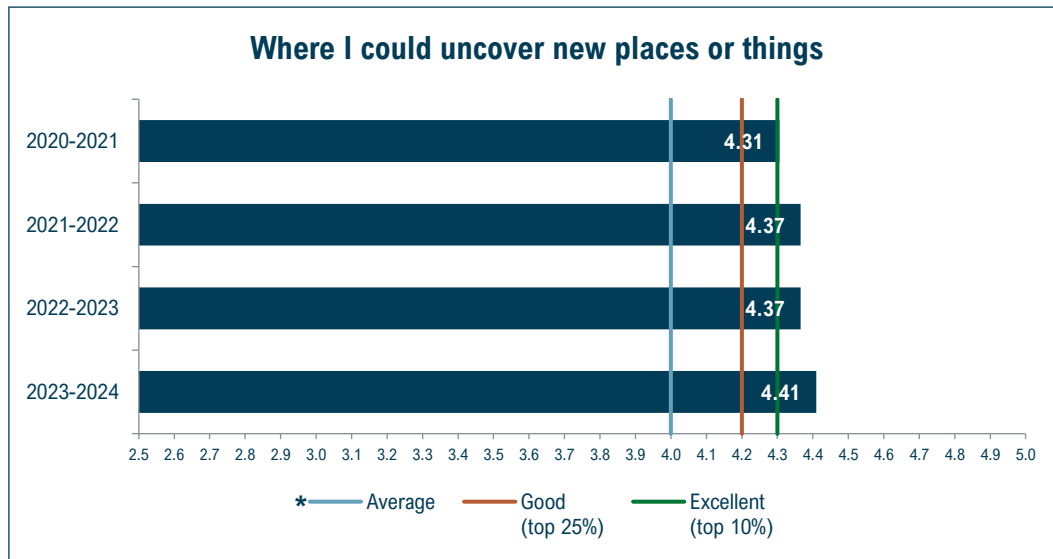
# Creative Communication Ratings

- The 2023-2024 winter creative is excellent at communicating that a trip to New Hampshire would be *free-spirited*.
- While the ratings are generally good, they did decline year-over-year. This decline, as with awareness, is likely related to the poor snow conditions during winter 2023-2024. That is, ads featuring pristine snow conditions may not work as well when the actual conditions are poor. Ad wear-out could also be contributing to ratings declines, as this campaign has been running since winter 2020-2021.



\*The benchmarks are for winter campaigns being evaluated by snow travelers.

# Creative Communication Ratings Cont.

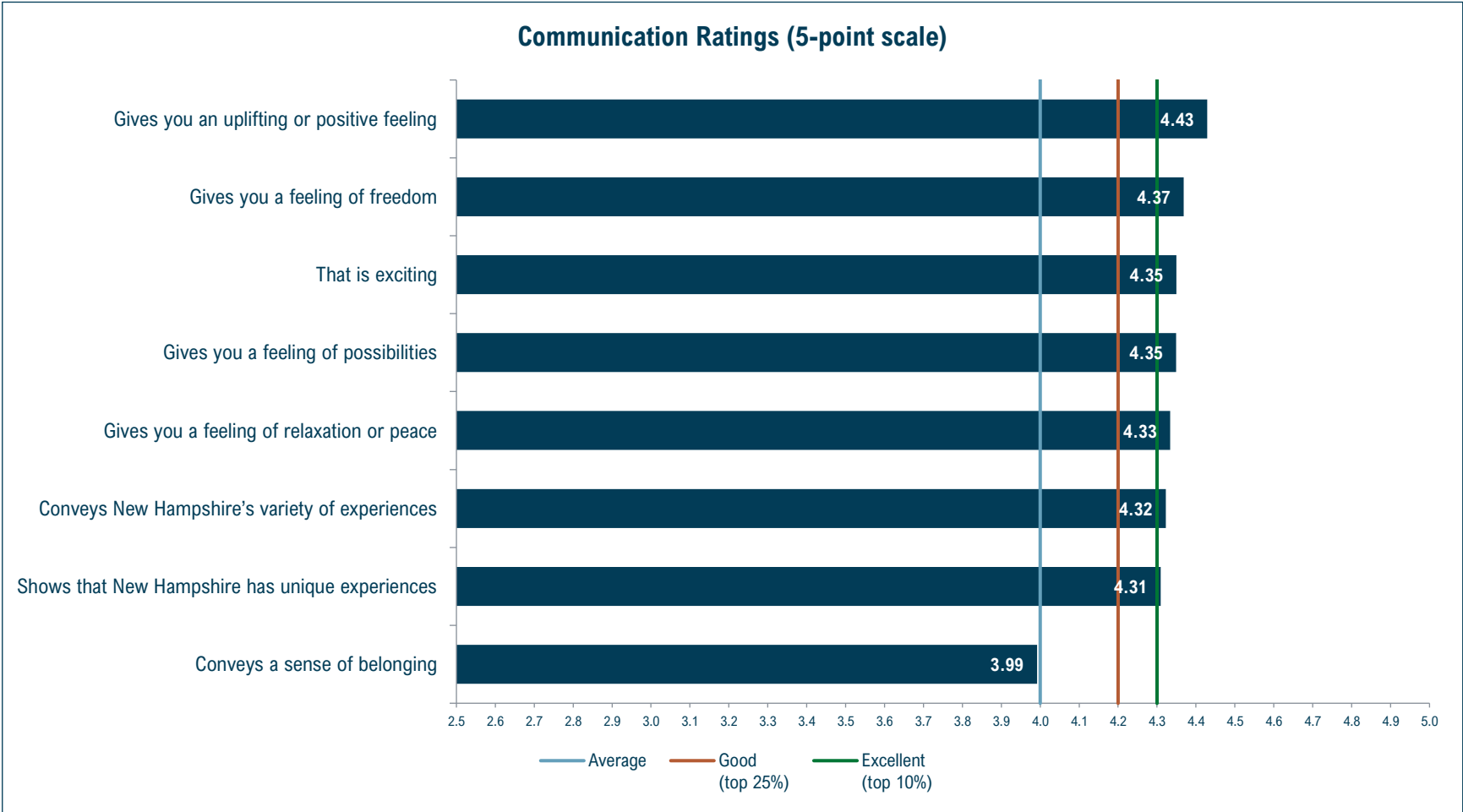


*\*The benchmarks are for winter campaigns being evaluated by snow travelers.*

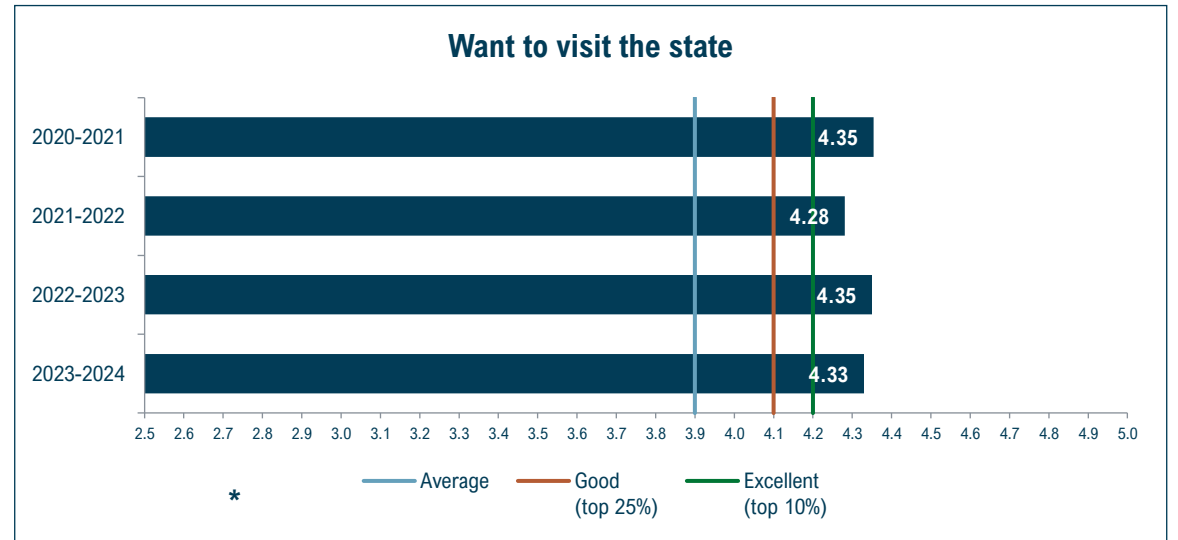
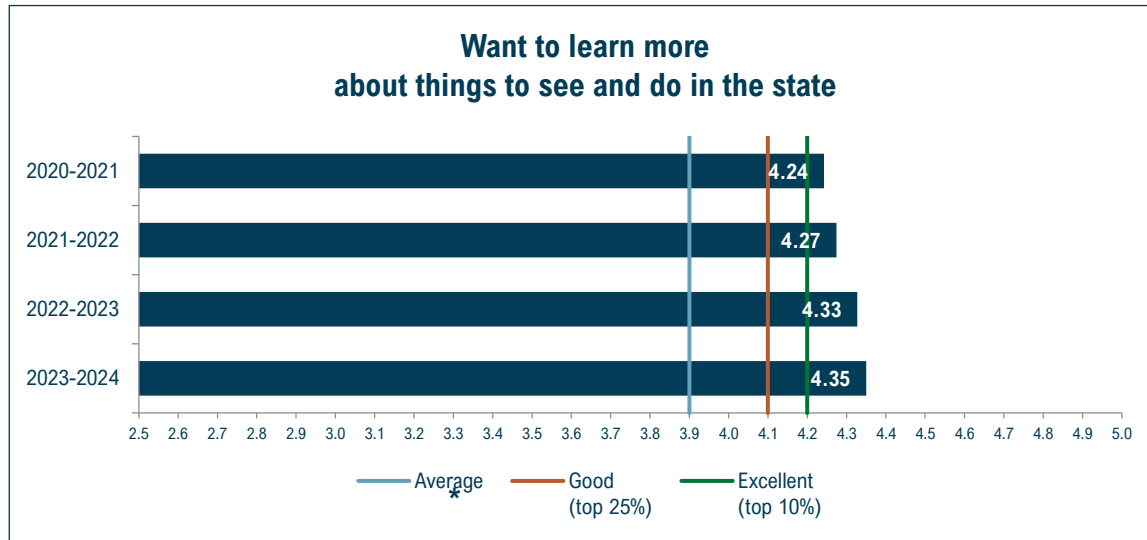
- The winter advertising continues to excel in its communication of *uncovering new places or things*.
- The 2023-2024 advertising met the average threshold for communicating *challenged to live life to the fullest*. Last year, the rating on this attribute was well-above the top 25% level. Again, this decline could be snow quality related.

# New Communication Ratings

- In this year’s study, some new communication attributes were debuted to help better understand how the ads make the viewers feel.
- The campaign cleared the top 10% benchmark for all these attributes aside from *conveys a sense of belonging* which fell just below the average rating.



# Creative Impact Ratings



*\*The benchmarks are for winter campaigns being evaluated by snow travelers.*

- The 2023-2024 winter advertising also excels from this evaluative ratings standpoint at generating interest in New Hampshire winter travel. The rating for *want to learn more* is at a five year high, while the rating for *want to visit the state* fell just below last year's high point.
- While it is positive to see that the creative impact ratings did not decline year-over-year like many of the communication ratings, it is important to remember that these are just evaluated reactions. Actual ad influence is evaluated in the next section by comparing the behaviors of those aware of the ads to the behaviors of those not aware of the ads.

# Advertising Influence

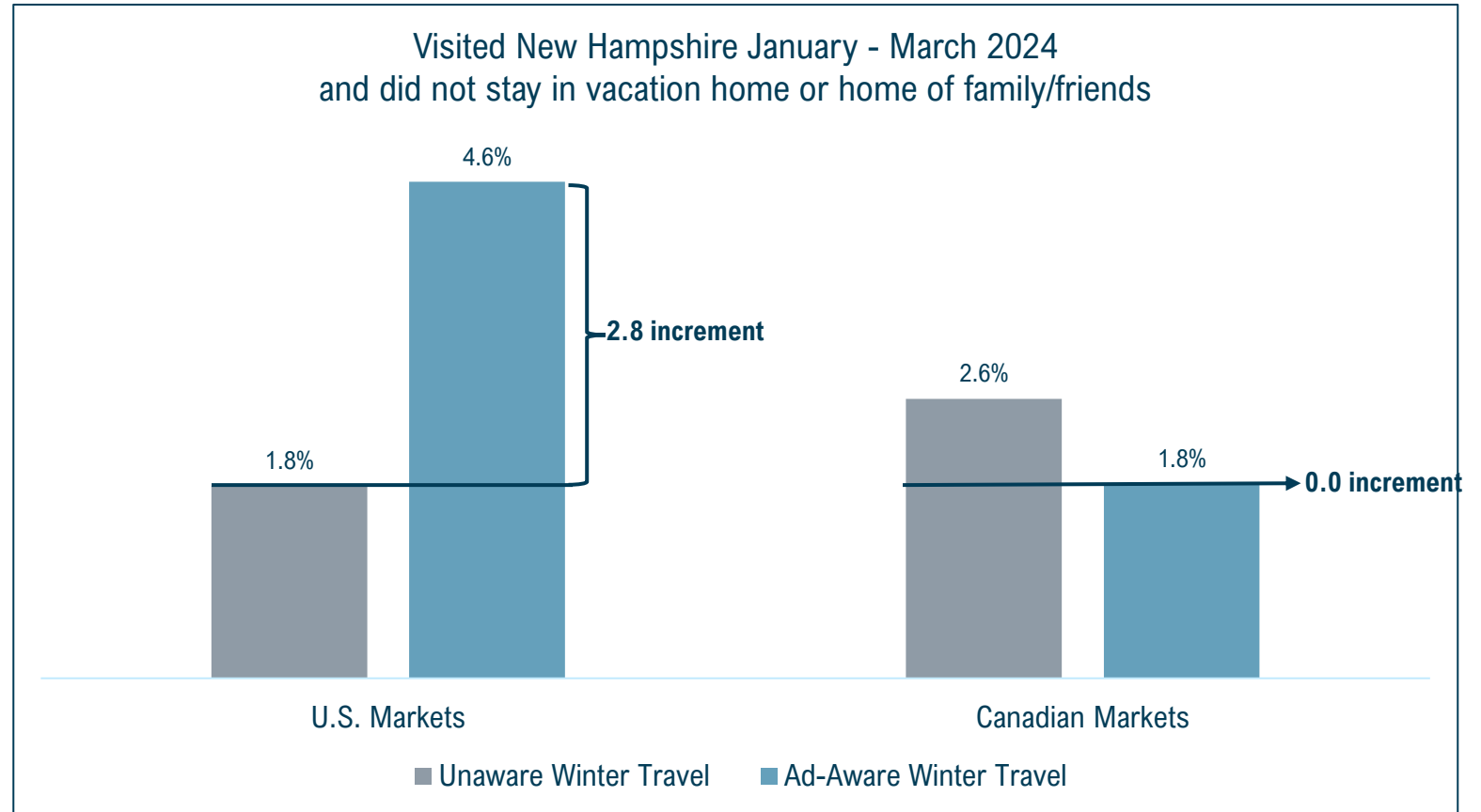
SMARInsights' methodology for evaluating the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus, not all visitation, or even visitation by ad-aware households, is considered attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Any travel above that base by *aware* households is what is considered influenced. As such, this is a conservative measure of influence.

Moreover, for this winter review we are counting only travel that occurred between January and March of 2024 that did not include a stay at the visitor's vacation home or the home of family/friends.



# 2023-2024 Ad-Influenced Winter Travel

- The 2023-2024 winter advertising influenced New Hampshire travel from the domestic markets, but not from the Canadian markets.
- In addition to the poor snowfall, the Canadian markets had the added challenge of an unfavorable exchange rate. Canadians may have opted to travel north for winter leisure trips, where there was better snow and no currency exchange.
- It should also be noted that both Canadian markets (Montreal and Quebec City) were evaluated separately and there was no ad-influenced travel from either of them.



# 2023-2024 Winter Advertising ROI

- The 2023-2024 winter advertising ultimately influenced about 64,000 New Hampshire trips and \$83 million in visitor spending, all coming from the domestic markets.
- The advertising returned \$153 in visitor spending for each \$1 invested in the media.

	U.S. Markets	Canadian Markets	Total
Target HHs	4,150,498	324,000	4,474,498
Ad Awareness	55%	75%	56%
Ad-Aware HHs	2,271,432	244,466	2,515,898
Incremental Travel	2.8%	0.0%	2.5%
Ad-Influenced Trips	64,104	0	64,104
Average Trip Spending	\$1,288	NA	\$1,288
Ad-Influenced Spending	\$82,593,685	\$0	\$82,593,685
Media Investment	\$483,350	\$55,038	\$538,388
<b>ROI</b>	<b>\$171</b>	<b>\$0</b>	<b>\$153</b>

# 2023-2024 Winter Advertising Tax ROI

- Of the ad-influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so only those expenses related to lodging, meals and transportation are taxed.
- Based on the average visitor spending on the taxable categories of lodging, meals, and transportation, the 2023-2024 winter advertising generated about \$6.0 million in taxes.
- The 2023-2024 advertising returned about \$11 in tax revenue for each \$1 invested.

Ad-Influenced Trips	64,104
Avg. Taxable Trip Spending	\$1,037
Ad-Influenced Taxable Spending	\$66,445,164
Taxes Generated (9% tax rate)	\$5,980,065
Media Investment	\$538,388
<b>Tax ROI</b>	<b>\$11.11</b>

# Winter Advertising ROI Tracking

For each row:

Above-Average Across Years

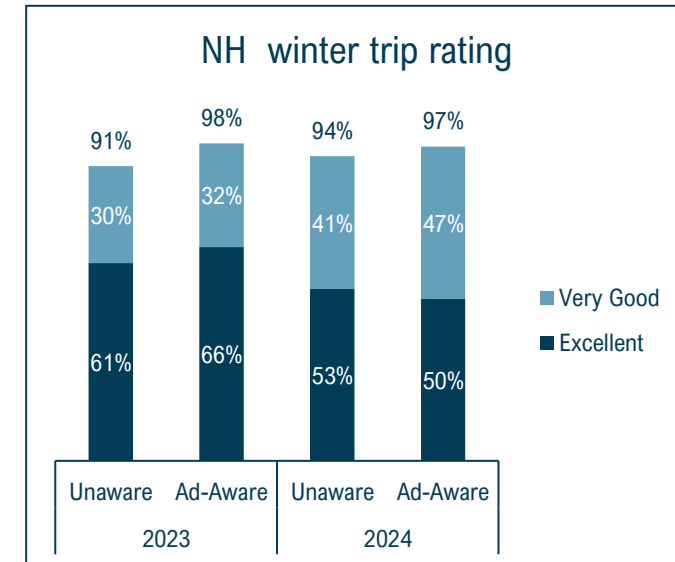
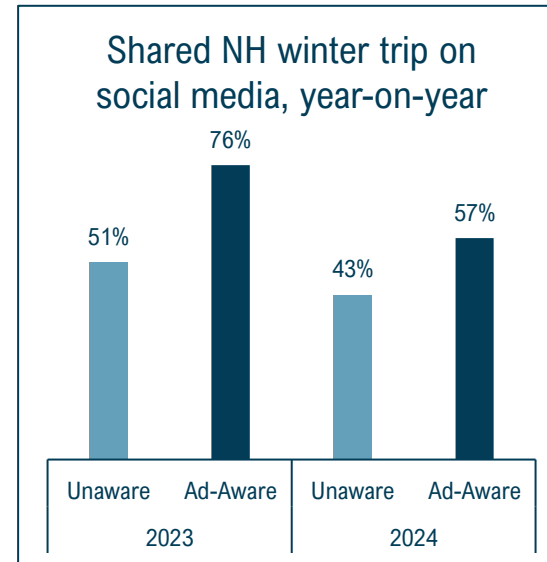
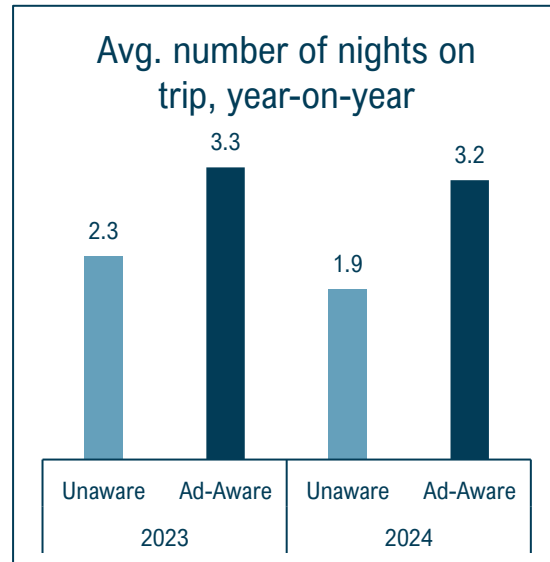
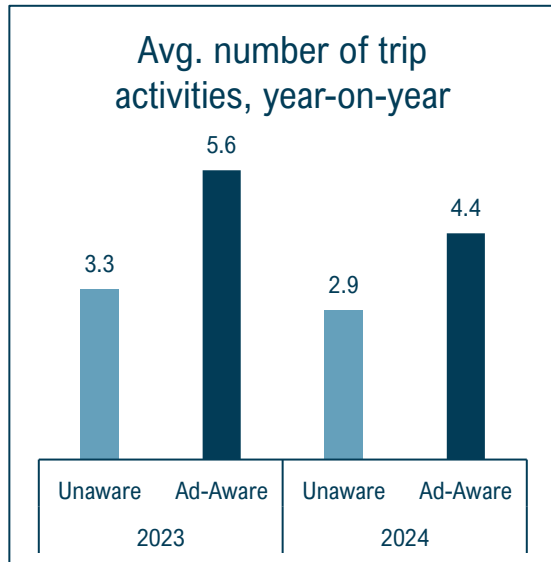
Average Across Years

Below-Average Across Years

- The 2023-2024 ROI and tax ROI are the second-lowest of the past five years, above only the COVID-suppressed winter 2020-2021 results.
- These results show how vulnerable tourism is to uncontrollable forces, whether they be pandemics or poor weather.
- One other thing to note when looking at the results across years is that the household base in 2021-2022 is large due to the inclusion of “long drive” target markets. These additional, more distant markets suppressed incremental travel that year. The level of incremental travel in 2023-2024 is well-above that of 2021-2022, but ROI is lower this year due to fewer target households and a larger media investment.

	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Target HHs	6,433,066	1,927,786	12,725,929	5,519,065	4,474,498
Ad Awareness	52%	64%	47%	61%	56%
Ad-Aware HHs	3,370,926	1,228,398	5,933,788	3,371,419	2,515,898
Incremental Travel	5.70%	1.60%	1.30%	2.80%	2.50%
Ad-Influenced Trips	190,794	19,286	79,919	96,073	64,104
Average Trip Spending	\$1,359	\$955	\$1,385	\$1,492	\$1,288
Ad-Influenced Spending	\$259,289,605	\$18,419,365	\$110,710,604	\$143,382,835	\$82,593,685
Media Investment	\$418,175	\$356,808	\$364,471	\$406,766	\$538,388
ROI	\$620	\$52	\$304	\$352	\$153
Avg. Taxable Trip Spending	\$1,015	\$707	\$956	\$1,023	\$1,037
Ad-Influenced Taxable Spending	\$193,656,328	\$13,629,500	\$76,376,140	\$98,327,450	\$66,445,164
Taxes Generated	\$17,429,069	\$1,226,655	\$6,873,853	\$8,849,470	\$5,980,065
Media Investment	\$418,175	\$356,808	\$364,471	\$406,766	\$538,388
Tax ROI	\$41.68	\$3.44	\$18.86	\$21.76	\$11.11

# 2024 Winter Advertising Influence on the Trip



- Although there were year-over-year decreases in average number of activities on the trip, nights stayed, and rates of sharing to social media, awareness of the ads continues to create lift in each of these metrics.
- Less active, shorter trips with less social sharing are also likely artifacts of the lack of snowfall.

# Appendix: Questionnaire



**SMAR**insights

# Questionnaire

**New Hampshire Tourism  
2023-2024 Winter & Ad Awareness and ROI  
April 2024**

ZIP. What is your ZIP/postal code? \_\_\_\_\_

S2. Who in your household is responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE

S1. Please indicate which of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, X (formerly Twitter), Instagram, or TikTok	<input type="checkbox"/>	<input type="checkbox"/>
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF THIS AND PLANNING = 0, TERMINATE AFTER SCREENING QUESTIONS)	<input type="checkbox"/>	<input type="checkbox"/>
I am currently planning or have already planned an upcoming leisure trip		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	<input type="checkbox"/>	<input type="checkbox"/>
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, Max (formerly HBO Max), or HULU	<input type="checkbox"/>	<input type="checkbox"/>
I'm interested in taking winter vacations that involve skiing, snowboarding, snowmobiling, snowshoeing, or other outdoor winter activities (IF =0, TERMINATE AFTER SCREENING QUESTIONS.)	<input type="checkbox"/>	<input type="checkbox"/>
I like to travel during the fall to view the changing leaves	<input type="checkbox"/>	<input type="checkbox"/>
I engage in skiing, snowmobiling and/or other outdoor winter activities		

AGE. What is your age? \_\_\_\_\_ [TERMINATE under 18 - over 65]

Social. Which of the following social networking sites do you use? *Select all that apply.* [ROTATE]

- Facebook
- X (formerly Twitter)
- YouTube
- Instagram
- Travel review sites such as TripAdvisor
- Snapchat
- Pinterest
- TikTok
- Other, please specify \_\_\_\_\_
- None

ASK SOCIAL2 IF THEY USE INSTAGRAM FROM SOCIAL

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Influencers (Core, Montreal and Quebec City)\State Insta Accounts



Social2. Which of these state tourism accounts do you follow on Instagram?  
SHOW ALL ON SAME SCREEN.

1. Thinking about places to go for leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

- STATE #1 \_\_\_\_\_
- STATE #2 \_\_\_\_\_
- STATE #3 \_\_\_\_\_
- STATE #4 \_\_\_\_\_
- STATE #5 \_\_\_\_\_

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to or within the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you most prefer to visit for a leisure trip within the next year? *Please select only one.* [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	
Other, please specify	

5. Have you taken a leisure trip to or within any of the following states in 2024? How many trips did you take in 2024?

[ROTATE]	States traveled to or within in 2024 (Select all that apply)	Number of trips in 2024 FORCE GREATER THAN 0
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

6. In the course of planning for any recent or upcoming trips to or within New Hampshire, have you gathered information in any of the following ways?

1. Requested a New Hampshire Visitor's Guide
2. Visited the New Hampshire Tourism site, [www.visitnh.gov](http://www.visitnh.gov)
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on X (formerly Twitter)
5. Followed Visit New Hampshire on Instagram
6. Received an e-newsletter
7. Requested information about a New Hampshire trip in another way
8. None of these

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)

Now please give us some information about the trip(s) you took to or within New Hampshire in 2024.

9. When did you travel to or within New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

Select all that apply.

- January 2024
- February 2024
- March 2024
- April 2024

# Questionnaire

Now we'd like to ask you some questions about your most recent New Hampshire trip.

10\_1. How many nights did you spend in New Hampshire during this trip? \_\_\_\_\_

10\_2. Including you, how many people were in your travel party? \_\_\_\_\_

ASK Q10b if Q10\_2 > 1

10b. Of those, how many were children under age 18? \_\_\_\_\_

ASK Q10c if Q10\_1 > 0

10c. What forms of lodging did you use during your trip? *Select all that apply.*

- Luxury resort hotel
- High-end full-service hotel
- Mid-level hotel
- Budget hotel or motel
- Bed and breakfast/Inn
- Airbnb/VRBO
- Camping/RVing
- Home of family or friends
- Vacation home
- Other

11. Which of the following activities did you participate in during your trip to or within New Hampshire?

*Select all that apply. [ROTATE]*

Hiking or backpacking	Wildlife watching
Visiting a state or national park	Bird watching
Bicycling or mountain biking	Scenic drive
ATVing	Sightseeing tour
Rock climbing	Golfing
Horseback riding	Shopping
Hunting	Dining at locally owned restaurants
Camping	Visiting a noteworthy bar or nightclub
Skiing or snowboarding	Farm to table dinner
Snowmobiling	Winery tours
Fishing	Brewery
Visiting museums	Farmer's markets/U-picks/roadside stand
Attending a play or concert	Canoeing or kayaking
Attending a festival or fair	Boating
Attending performing arts (music/theater)	Dogsledding
Visiting historical sites	Cross country skiing
Snowshoeing	Ice fishing
Ice skating	Other, please specify _____
	None of these

4

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to New Hampshire. *You may choose up to 3.*

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

Click to select region(s).

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was...?

- 5. Excellent
- 4. Very good
- 3. Good
- 2. Fair
- 1. Poor

15. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...  
**Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"**

Accommodations (includes campground fees)	
Food and beverage service	
Food stores	
Local transportation & gasoline	
Arts, entertainment, and recreation	
Retail sales	
Visitor air	
Other	
Total	SHOW TOTAL

16. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

5

17. Did you post any information about this trip on the following outlets? *Select all that apply.*

- 1. Facebook
- 2. X (formerly Twitter)
- 3. Flickr
- 4. YouTube
- 5. Blogs
- 6. Instagram
- 7. Pinterest
- 8. Snapchat
- 9. TikTok
- 10. None of these

23. How likely are you to recommend a trip to New Hampshire?

- 1. Very likely
- 2. Somewhat likely
- 3. Not likely

24. Have you seen any advertising for New Hampshire as a travel destination?

- 1. Yes
- 0. No

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

ROTATE APPEARANCE OF MEDIA

PRINT

ALL U.S. MARKETS

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Yankee Print Ad (Core and Opportunity)



0371\_2023 Yankee Winter-Spread\_R2.jpg

WinterPrint. Please indicate if you have seen this print ad before.

- 1. Yes
- 0. No

WinterPrintB. What is your reaction to this ad?

- 1. Positive
- 2. Neutral
- 3. Negative

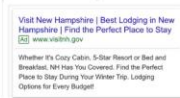
6



# Questionnaire

## SEM

### ALL MARKETS EXCEPT MAINE



WinterSEM. Have you seen this or a similar ad for New Hampshire?

1. Yes
0. No

## DIGITAL

### CORE MARKETS (NH, MA, RI, ME)

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Display\Core (NH, MA, RI, ME)\Off Slope Adventure	I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Display\Core (NH, MA, RI, ME)\Skiing Groomed	I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Display\Core (NH, MA, RI, ME)\Retargeting

### MONTREAL AND QUEBEC ONLY:

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Display\Canada (Montreal, Quebec City)\Off Slope Adventure French	I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Display\Canada (Montreal, Quebec City)\Retargeting French

WinterDigital. Please indicate if you have seen each of these online ads before.

1. Yes
0. No

WinterDigitalB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative

7

## VIDEO

### CORE MARKETS (NH, MA, RI, ME), MONTREAL, QUEBEC CITY

#### 30 SECOND VIDEOS SHOW BOTH 30 SECOND VIDEOS

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Video (Core, Montreal, Quebec City)\30

VNH_30_SFX_FINAL	1_Winter2024_Dark Post Video_30
VNH_30_SFX_FINAL.mp4 Vimeo # 929850385	1_Winter2024_Dark Post Video_30.mp4 Vimeo # 929850466

## 15 SECOND VIDEOS

### SHOW ONE OF THREE 15 SECOND VIDEOS SELECTED RANDOMLY

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Video (Core, Montreal, Quebec City)\15\15s TO USE

3_Winter2024_Dark Post Video_15 Off Slope.mp4 Vimeo # 929854032	NH Tourism 15 - Traditional Skiing.mp4 Vimeo # 929854153	NH Tourism15 - Snowmobiling.mp4 Vimeo # 929854269

WinterTV. Have you seen this or a similar ad for New Hampshire?

1. Yes
0. No

## ASK FOR EACH VIDEO AD

WinterTVB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative

8

## OUT OF HOME

### MA, RI

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\OOH



WinterOOHA. Please indicate if you have seen each of these outdoor ads before.

1. Yes
0. No

WinterOOHB. What is your reaction to these outdoor ads?

1. Positive
2. Neutral
3. Negative

## SOCIAL INFLUENCER

ASK ONLY IF THEY USE INSTAGRAM FROM SOCIAL QUESTION

## STILLS

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Influencers (Core, Montreal and Quebec City)\Jacqueline K



Jacqueline K Stills.jpg

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Influencers (Core, Montreal and Quebec City)\Traveling Mainers



Traveling Mainers Stills.jpg

9

# Questionnaire

ASK FOR EACH SET OF STILLs

WinterInfluencerA. Have you seen any of these or similar social media influencer content about New Hampshire before?

1. Yes
0. No

VIDEOS

JACQUELINE K

SHOW TWO OF THESE FOUR VIDEOS RANDOMLY SELECTED.



jkrow\_Reel 1

<https://vimeo.com/929595307?share=copy>



jkrow\_Reel 2

<https://vimeo.com/929597647?share=copy>



jkrow\_snow coach story

<https://vimeo.com/929597844?share=copy>



JKrow\_Wentworth Story

<https://vimeo.com/929597956?share=copy>

TRAVELING MAINERS

SHOW THREE OF THESE EIGHT VIDEOS RANDOMLY SELECTED.



Traveling Mainers\_Reel 1

<https://vimeo.com/929601232?share=copy>



Traveling Mainers\_Bens Sugar Shack Story

<https://vimeo.com/929601440?share=copy>



Traveling Mainers\_Museum Story

<https://vimeo.com/929601476?share=copy>

10



Traveling Mainers\_Purgatory Falls Story

<https://vimeo.com/929601514?share=copy>



Traveling Mainers\_Reel 2

<https://vimeo.com/929601558?share=copy>



Traveling Mainers\_Reel 3

<https://vimeo.com/929601801?share=copy>



Traveling Mainers\_Reel 4

<https://vimeo.com/929601917?share=copy>



Traveling Mainers\_Stafford Lake Story

<https://vimeo.com/929602099?share=copy>

WinterInfluencerA1. Have you seen this or similar social media influencer content about New Hampshire before?

1. Yes
0. No

WinterInfluencerB. What is your reaction to this social media influencer content?

1. Positive
2. Neutral
3. Negative

11

PAID SOCIAL

ASK ONLY IF THEY USE FACEBOOK OR INSTAGRAM FROM SOCIAL QUESTION

CORE MARKETS (NH, MA, RI, ME)

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Paid Social\Core (NH, MA, RI, ME)



CANADIAN MARKETS

ENGLISH

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Paid Social\Canada (Montreal, Quebec City)\English



FRENCH

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Paid Social\Canada (Montreal, Quebec City)\French



WinterSocialbannerA. Please indicate if you have seen each of these social media ads before.

1. Yes
0. No

12

# Questionnaire

WinterSocialbannerB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative

WinterSocial. Please indicate if you have seen each of these social media ads before.

1. Yes
0. No

WinterSocialB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative

RICH MEDIA

CORE MARKETS (NH, MA, RI, ME), MONTREAL, QUEBEC CITY

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Rich Media Unit (Core, Montreal, Quebec City)



Vimeo # 929863437

WinterRich. Have you seen this or a similar ad for New Hampshire?

1. Yes
0. No

WinterRichB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative

13

SNOWBOUND EXPO

DO NOT SHOW TO CT, NY OR CANADIAN MARKETS

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Winter\Snowbound Expo at the Boston Convention & Exhibition Center, November 3 – 5, 2023

SHOW LOGO AND ASK EXPO1.



Snowbound Expo Logo USE

Expo1. Did you attend the 2023 Snowbound Expo in Boston?

1. Yes
0. No

ASK NH BOOTH AWARENESS IF THEY ATTENDED THE EXPO.



Snowbound Expo Collage

Expo2. Did you see the Ski New Hampshire booth at the 2023 Snowbound Expo in Boston?

1. Yes
0. No

28. Given all of these ads together, how much do you agree that this campaign shows a place...? ROTATE

	Strongly disagree				Strongly agree
That is inspiring	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5
That is exciting					

14

28a. How much do you agree that this campaign...?

ROTATE	Strongly disagree				Strongly agree
Conveys a sense of belonging	1	2	3	4	5
Gives you a feeling of freedom					
Gives you a feeling of relaxation or peace					
Gives you a feeling of possibilities					
Gives you an uplifting or positive feeling					
Conveys New Hampshire's variety of experiences					
Shows that New Hampshire has unique experiences					

29. How much do you agree that this campaign makes you...?. ROTATE

	Strongly disagree				Strongly agree
Want to learn more about things to see and do in the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

15

# Questionnaire

The following questions are for classification purposes only and will help us understand different groups of people.

- D3. Are you currently ...?
- Married
  - Divorced
  - Widowed
  - Single/Never married
- D4. Including you, how many people live in your household? \_\_\_\_\_ [IF 1, SKIP TO D6]
- D5. How many children under the age of 18 live in your household? \_\_\_\_\_
- D6. Which of the following categories represents the last grade of school you completed?
- High school or less
  - Some college/technical school
  - College graduate
  - Post-graduate degree
- D7. Which of the following categories best represents your total annual household income before taxes?
- USA ONLY:
- Less than \$35,000
  - \$35,000 but less than \$50,000
  - \$50,000 but less than \$75,000
  - \$75,000 but less than \$100,000
  - \$100,000 but less than \$150,000
  - \$150,000 but less than \$200,000
  - \$200,000 or more
- CANADA ONLY:
- Less than \$35,000 CAD
  - \$35,000 but less than \$50,000 CAD
  - \$50,000 but less than \$75,000 CAD
  - \$75,000 but less than \$100,000 CAD
  - \$100,000 but less than \$150,000 CAD
  - \$150,000 but less than \$200,000 CAD
  - \$200,000 or more CAD
- D8. Which of the following best describes your race or ethnicity? Are you...?  
Select all that apply.
- White
  - Hispanic or Latino
  - Black or African American
  - Asian
  - American Indian or Alaska Native
  - Middle Eastern or North African
  - Native Hawaiian or Other Pacific Islander

16

- D9. Do you identify as ...?
- Male
  - Female
  - Non-binary
  - Prefer not to answer

17