



New Hampshire

LIVE FREE

**2024 Spring/Summer Advertising
Effectiveness Wave 2 ROI Research**

October 2024

SMARInsights

Background & Objectives

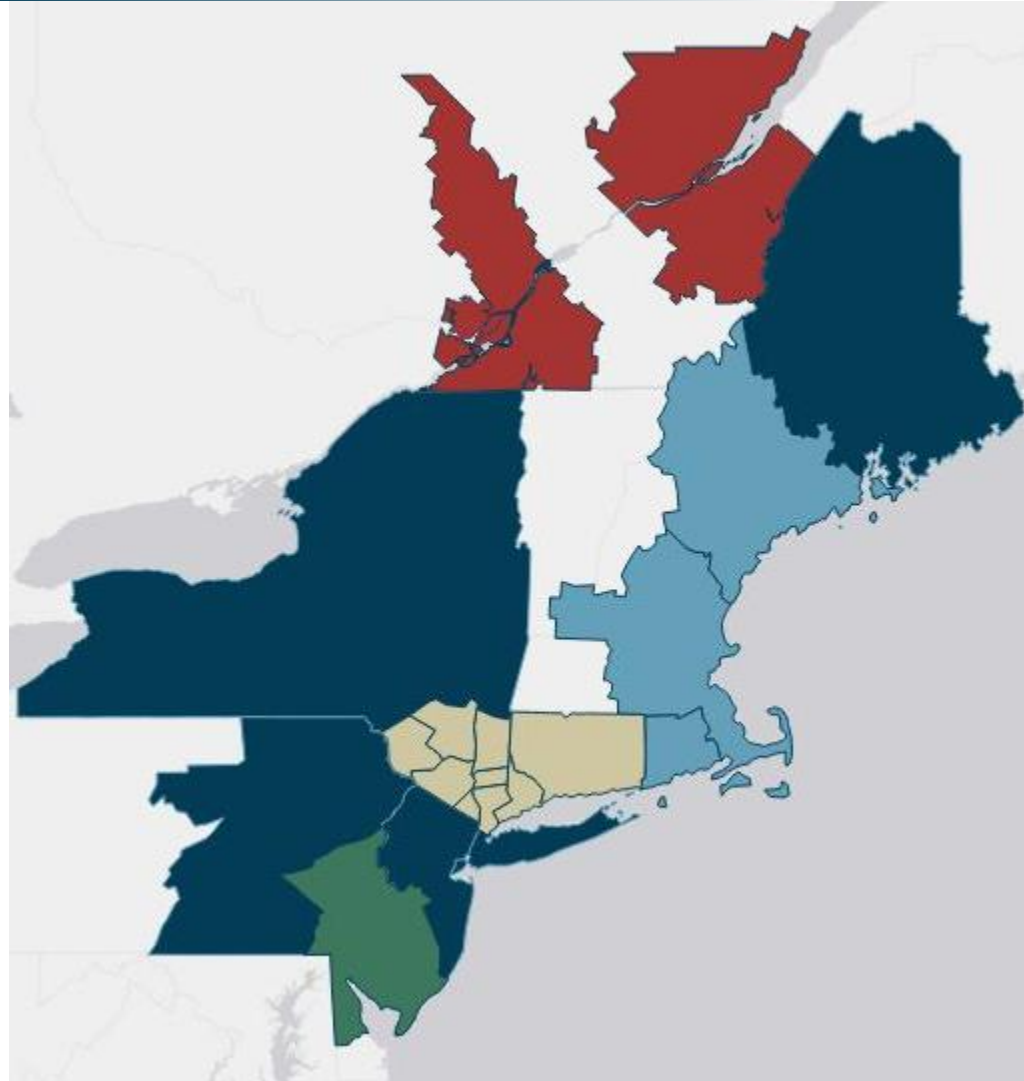
- The New Hampshire Division of Travel and Tourism Development (DTTD) ran updated advertising in core, opportunity, road trip, and Canadian markets. The updated ads no longer use the “Discover Your New” tagline.
- DTTD has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess the effectiveness of this 2024 spring/summer advertising. An initial ad awareness/creative evaluation research wave was completed in August 2024.
- This current research wave focuses on the impact of the advertising and the return on the media investment.
- The specific objectives of this ROI research include:
 - Reviewing the ad awareness and creative ratings results
 - Assessing the advertising influence on New Hampshire travel during spring/summer 2024
 - Exploring the results by market groups
 - Reviewing ad impact on the New Hampshire trip
 - Providing insights to guide marketing decision-making

Methodology

- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. This method 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.
- To qualify for the survey, respondents must be household travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents must also be between the ages of 18 and 65.
- The 2024 spring/summer advertising was aimed at existing northeastern core markets, opportunity markets, the road trip market, and Canadian markets. This study also included sample from spill markets, which are markets near the core and opportunity groups that are likely being exposed to the ads. A market map is provided on the following slide.
- A total of 2,304 ROI surveys were completed in September 2024. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the ad effectiveness research results.

	Market	Surveys
Core	Boston	300
	Portland/Auburn	150
	Providence/New Bedford	150
Opportunity	Hartford/New Haven	163
	Fairfield County	53
	Duchess County	52
	Orange County	50
	Ulster County	51
	Westchester County	61
	Rockland County	51
	Sullivan County	21
Road Trip	Philadelphia	300
Spill Markets	Remaining ME, NY, NJ, and Eastern PA	501
Canada	Montreal	200
	Quebec City	201
Total		2,304

Methodology - Markets



Core

Opportunity

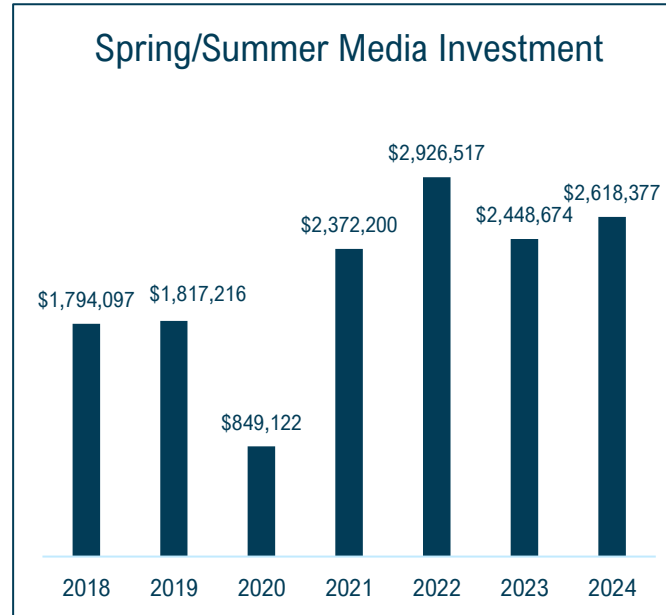
Road Trip

Canada

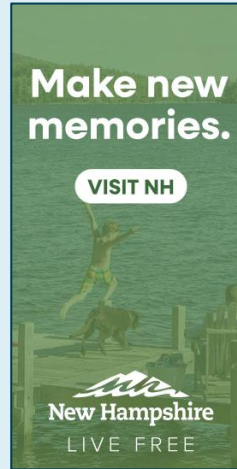
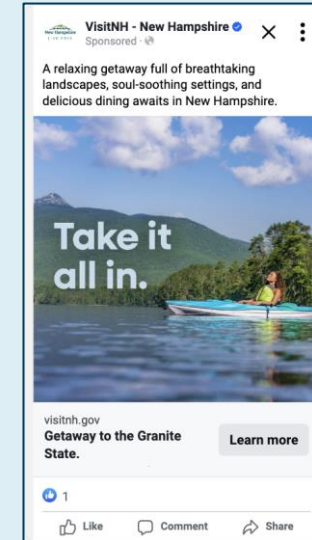
Spill Markets

Campaign Overview

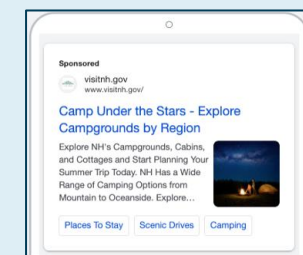
Market	Print	OOH	Video	Digital	Social Media	TOTAL
Core	\$32,466	\$190,485	\$380,905	\$27,470	\$100,500	\$904,647
Opportunity	\$15,460	\$66,228	\$422,989	\$291,690	\$142,500	\$1,169,434
Road Trip	\$3,608	\$116,150	\$148,004	\$75,200	\$62,500	\$509,065
Canada	\$0	\$59,321	\$190,300	\$214,100	\$78,500	\$628,149
TOTAL	\$51,534	\$432,184	\$1,142,198	\$608,460	\$384,000	\$2,618,377



- The 2024 spring/summer advertising tested in this research included print, out of home, video, digital display, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The ads feature New Hampshire’s outdoor, small town, road trip, and family-friendly activities and attractions.
- The media investment is the second-largest of the past seven years.



Samples of Creative



Spring/Summer 2024 Insights

DTTD ran updated advertising in spring/summer 2024 with a media investment was \$2.6 million, the second-largest investment of the past seven years. Overall, the campaign performed well in terms of awareness, creative ratings, and impact on travel. Key insights from the 2024 spring/summer research include:

- The advertising generated 55% awareness, reaching about 9.5 million households. The cost per aware household is \$0.28, which beats the norm of \$0.51 for campaigns of similar scope.
- Ad awareness is at peak levels compared to the past several New Hampshire spring/summer campaigns.
- The larger media investment led not only to higher ad awareness, but also to more media overlap, which is critical for generating advertising influence.
- The campaign performed in the top 10% benchmark range for showing a place where travelers will feel *inspired*, *free-spirited*, and able to *uncover new things*. This is the first year that *inspired* reached the top 10% benchmark. The campaign continues perform at the top 10% level for both encouraging consumers to learn more and want to visit New Hampshire, both of which reached historic high ratings this year.
- Fewer markets were targeted this year, meaning a smaller household base than prior years. However, “Spill” markets were included in this research to explore whether the advertising was reaching consumers beyond the more narrowly defined target area. The spill did indeed occur – 53% of Spill market consumers recalled the ads, compared to 68% in the Core markets, 60% in the Opportunity markets, 57% in the Drive market (Philadelphia), and 48% in the Canadian markets. Including the spill markets roughly doubles the quantity of ad-aware households.
- The 2024 spring/summer advertising ultimately influenced New Hampshire leisure travel from all market groups except Canada. The strongest travel increments were generated in the Core and Road Trip markets. The advertising influenced about 428,000 New Hampshire trips, \$532 million in visitor spending, and \$33 million in tax revenue. Visitor spending ROI is \$203; tax ROI is \$13.
- The level of ad-influenced travel, ad-influenced trips, visitor spending, and ROI are all down compared to recent years. The strong ROIs generated from 2021 to 2023 were indicative of the post-pandemic recovery boom that New Hampshire experienced. Now, in 2024, overall New Hampshire travel and ROI results are beginning to normalize.

FY2023/2024 Results

The total fiscal year ROI results include Fall 2023, Winter 2023/2024, and Spring/Summer 2024.

- Accounting for all FY2023/2024 campaigns, the advertising influenced \$720 million in visitor spending, \$46 million in tax revenue, a visitor spending ROI of \$218 and a tax ROI of \$14.
- Total FY2023/2024 ROI is down a bit compared to the past two years:
 - A more focused marketing strategy targeting fewer households in fall 2023 resulted in higher levels of ad awareness and incremental travel, but the smaller and closer-by household base meant lower average visitor spending, less ad-influenced visitor spending, and a lower ROI compared to last year.
 - Winter 2023/2024 was negatively impacted by below average snowfall.
 - Lower spring/summer results in 2023/2024 align with normalizing New Hampshire travel patterns after the post-COVID boom.

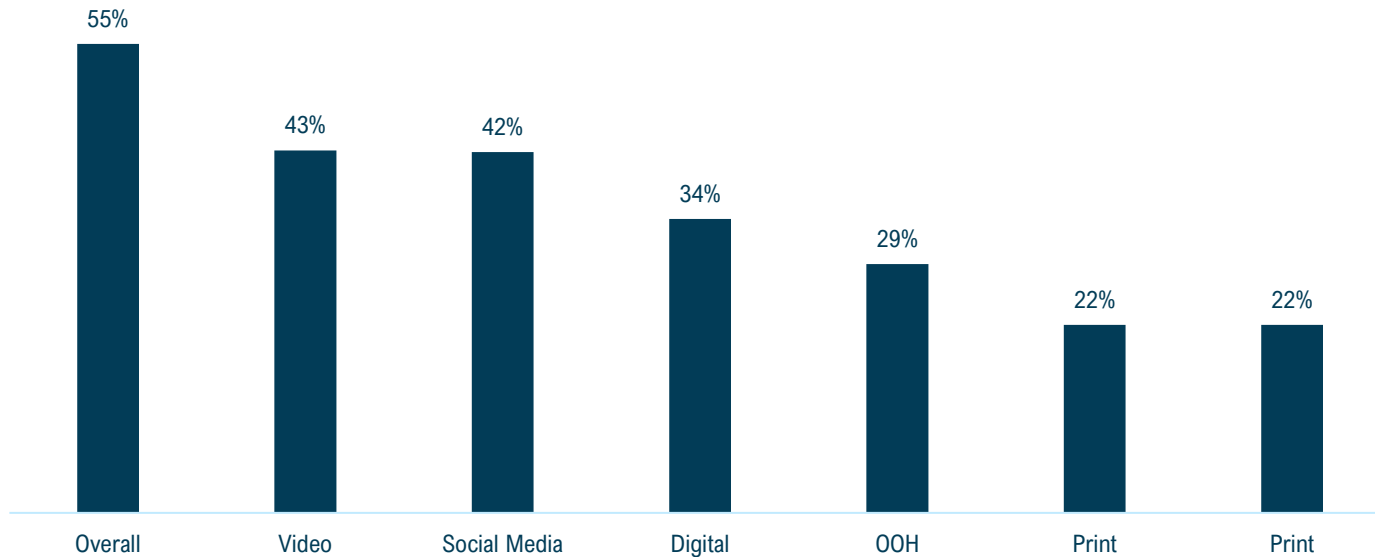
A person with a backpack is sitting on a rocky outcrop on a mountain peak, looking out over a vast, forested valley. The scene is captured in a blue-tinted, monochromatic style. The person is wearing a plaid shirt and shorts. The valley below is filled with dense evergreen trees, and the mountains in the distance are hazy.

Spring/Summer Ad Awareness And Creative Ratings Review

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2024 Ad Awareness

Awareness by Medium

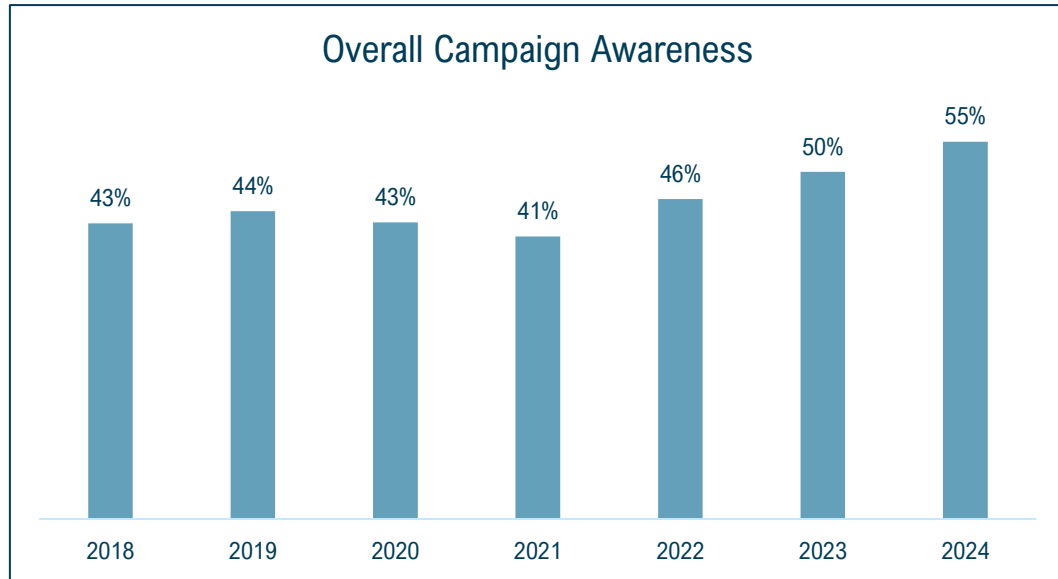


Target HHs	17,442,671
Ad Awareness	55%
Ad-Aware HHs	9,506,882
Media Investment	\$2,618,377
Cost per Aware HH	\$0.28

SMARInsights' spot market benchmark: \$0.51 per Aware Household

- The 2024 spring/summer campaign generated 55% awareness, reaching roughly 9.5 million households. A media investment of \$2.6 million translates to \$0.28 cost per aware household, which is below the SMARInsights' average of \$0.51 for similar campaigns.
- The video creative contributed the most to the overall reach with 43% awareness, followed by social media.

Tracking Ad Awareness



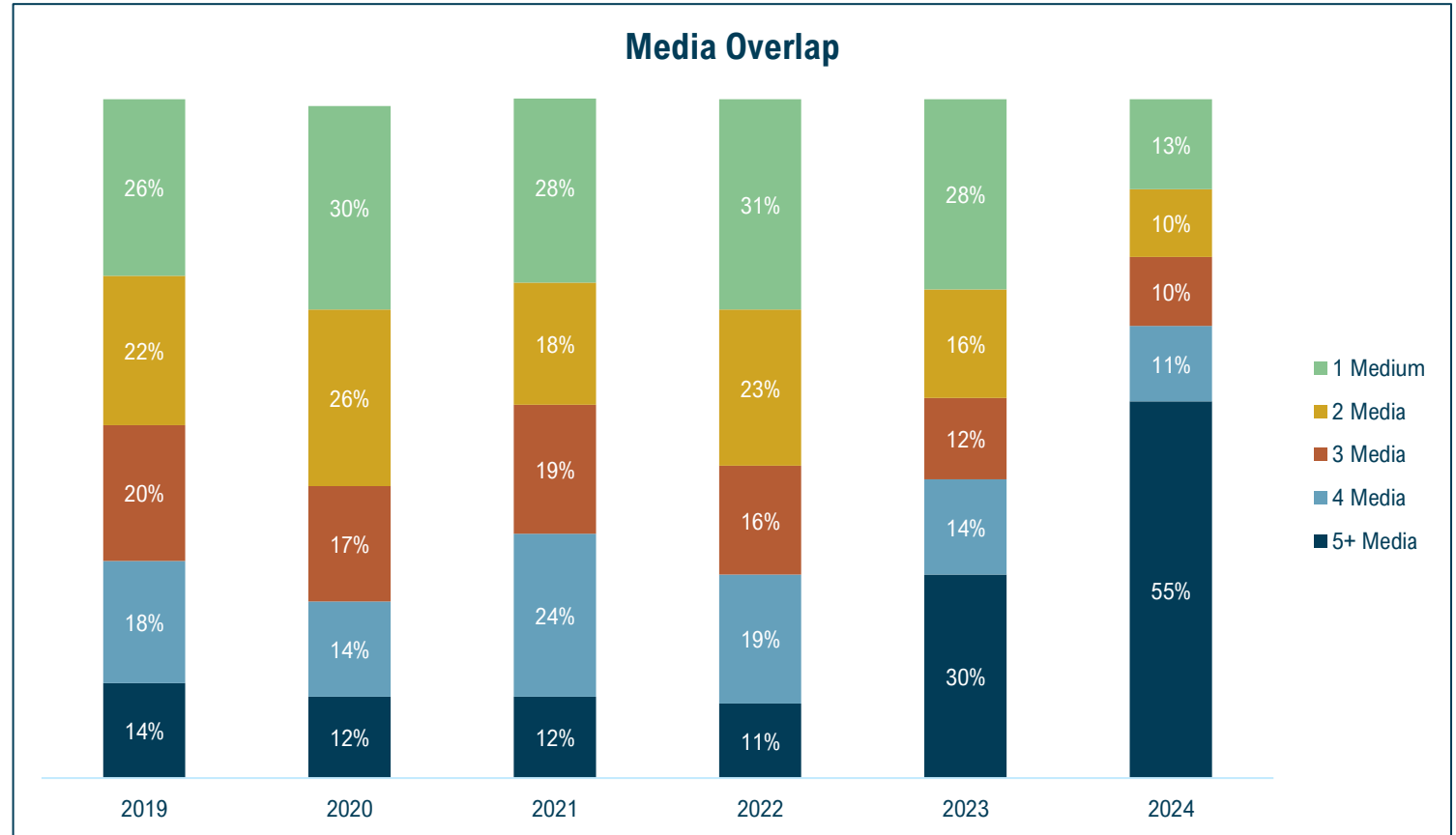
	2018	2019	2020	2021	2022	2023	2024
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,050	17,442,671
Ad Awareness	43%	44%	43%	41%	46%	50%	55%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	9,506,881
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926.52	\$2,448,674	\$2,618,377
Cost per Aware HH	\$0.29	\$0.25	\$0.16	\$0.23	\$0.23	\$0.28	\$0.28

- Compared to last year, a larger media investment in 2024 led to higher ad awareness and a similarly efficient campaign in terms of cost per aware household.

SMARInsights' spot market benchmark: \$0.51 per Aware Household

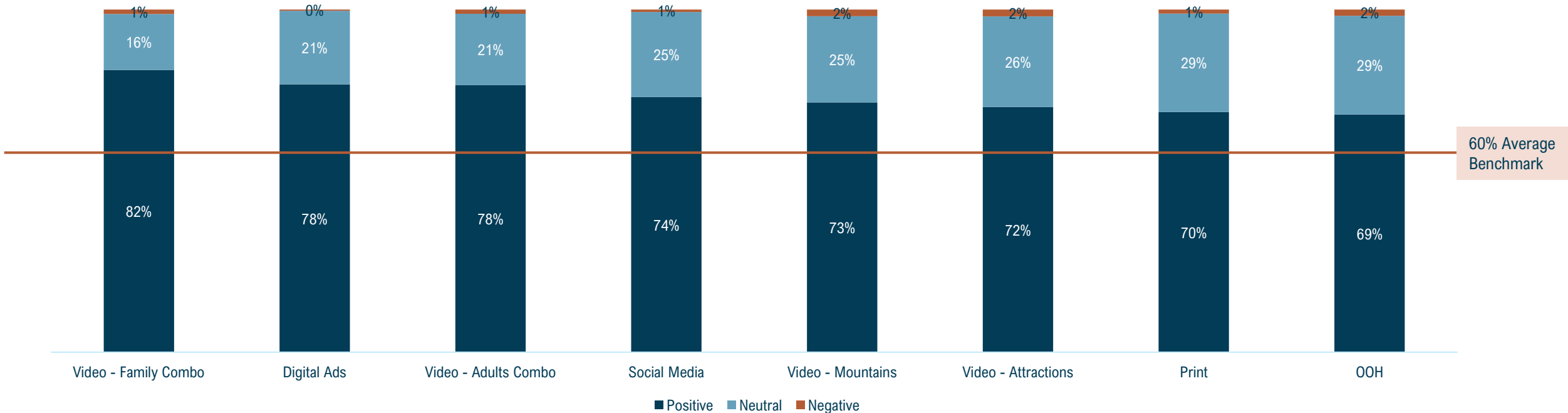
Media Overlap

- Of those aware of any 2024 ads, 66% were aware of 4 or more ad media – the highest in past 5 years.
- This increased overlap is most likely attributable to the increased media spend creating more opportunities for exposure to the creative.
- Reaching consumers with multiple forms of advertising tends to correspond with strong incremental travel.



Overall Reaction

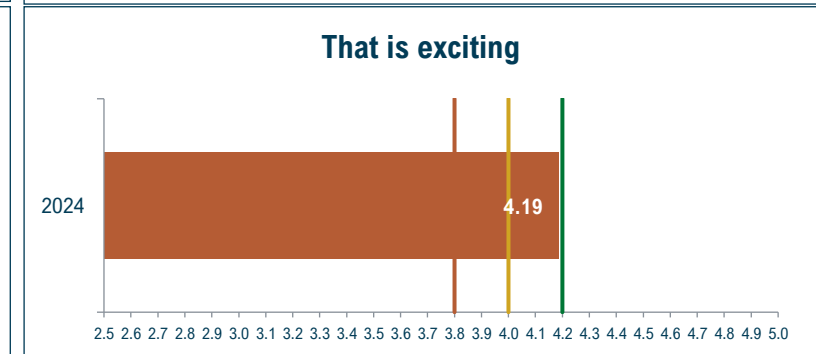
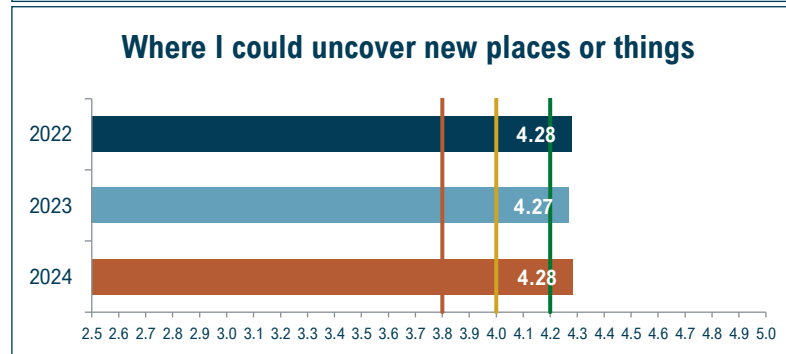
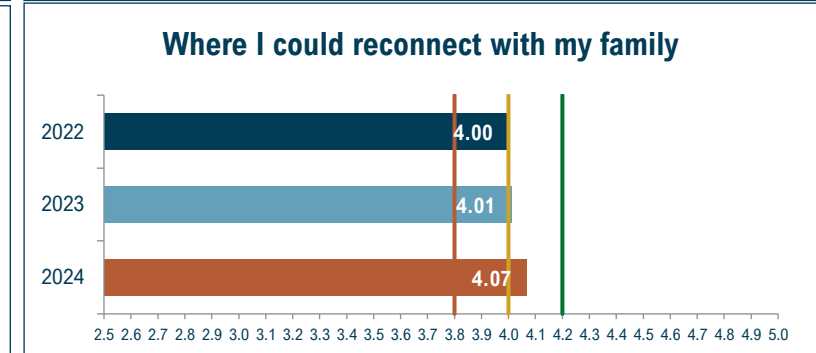
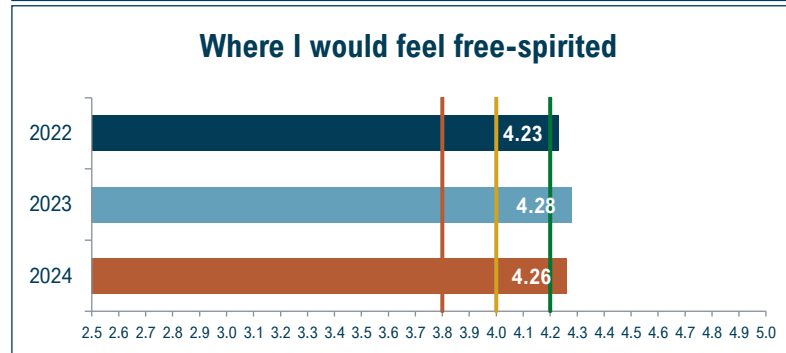
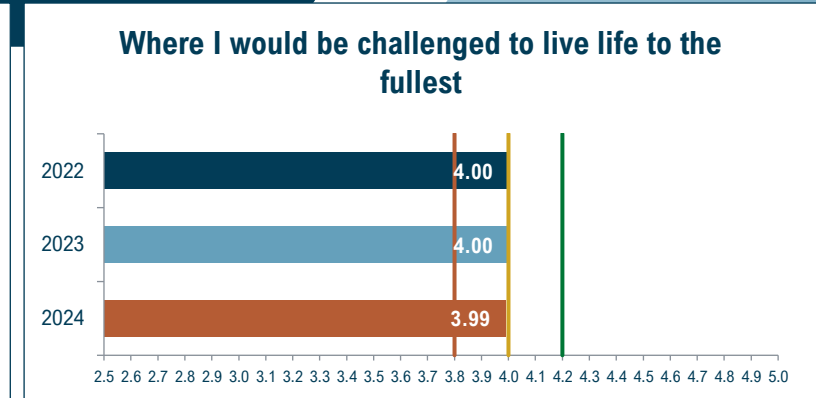
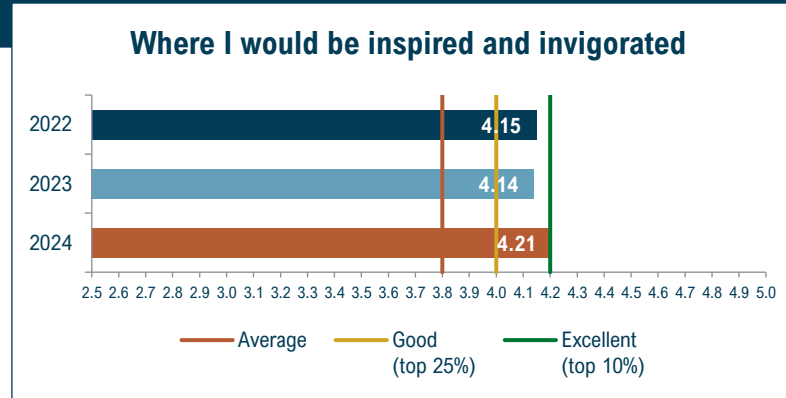
Reaction to the Creative by Medium



- All the ads received positive reactions above the SMARInsights' benchmark of 60%. Consumers tend to be the most positive toward video, which is the case for this campaign.

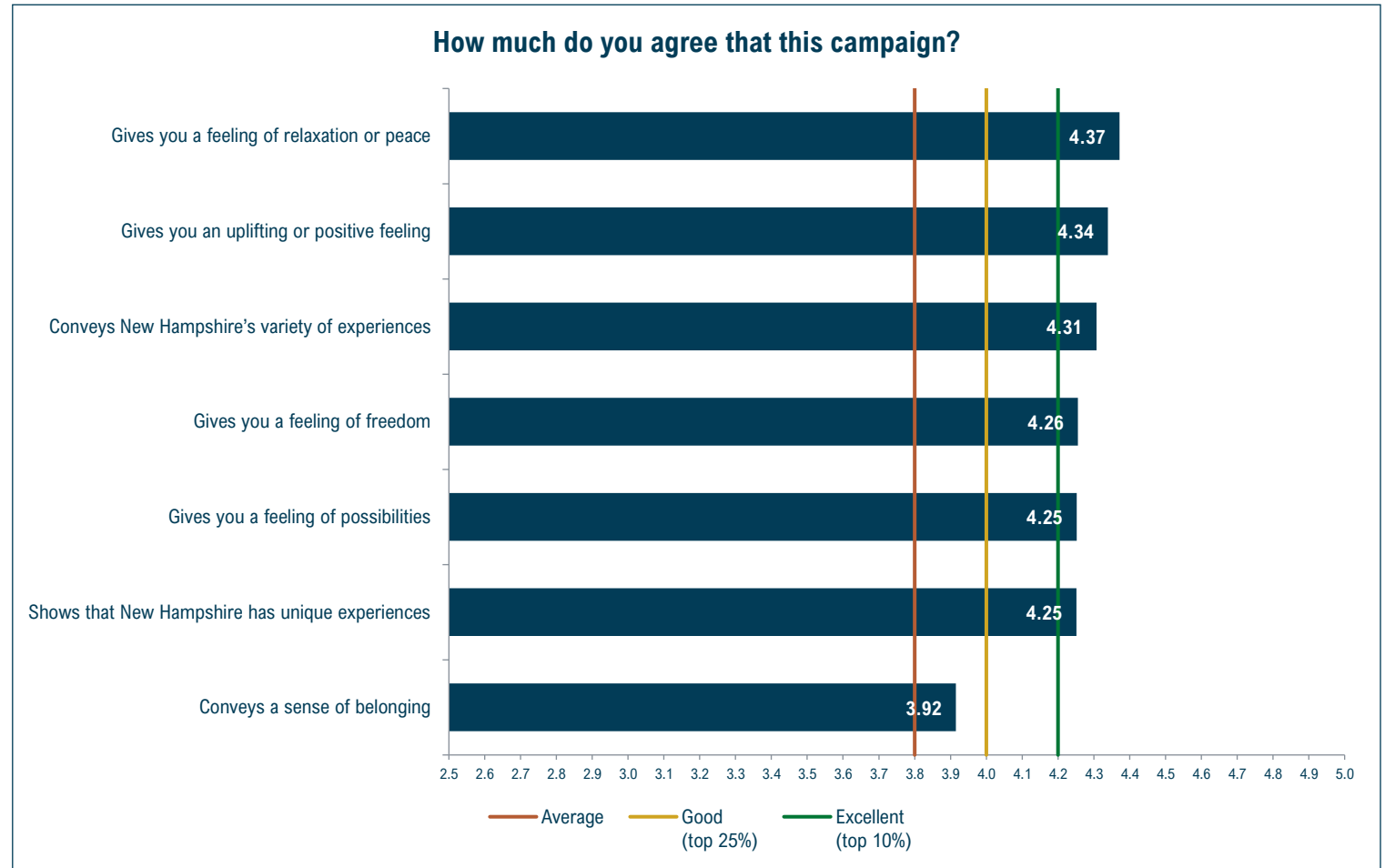
Communication Attributes

- This year, the campaign performed in the top 10% benchmark range for showing a place where travelers will feel *inspired*, *free-spirited*, and able to *uncover new things*. This is the first year that *inspired* reached the top 10% benchmark.
- The new attribute measured this year, *exciting*, fell just outside of the top 10% benchmark it the first year of measurement.



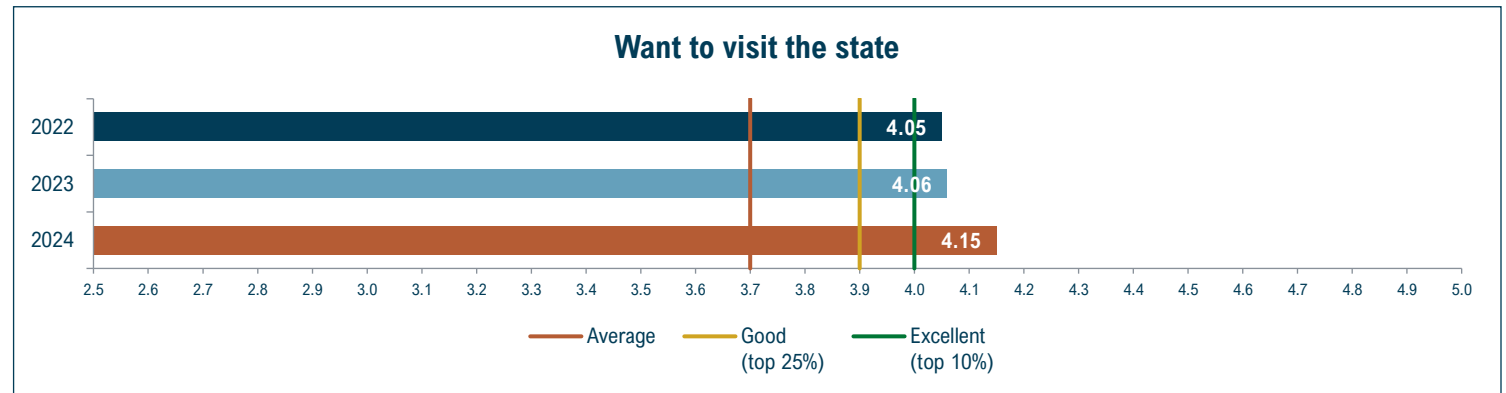
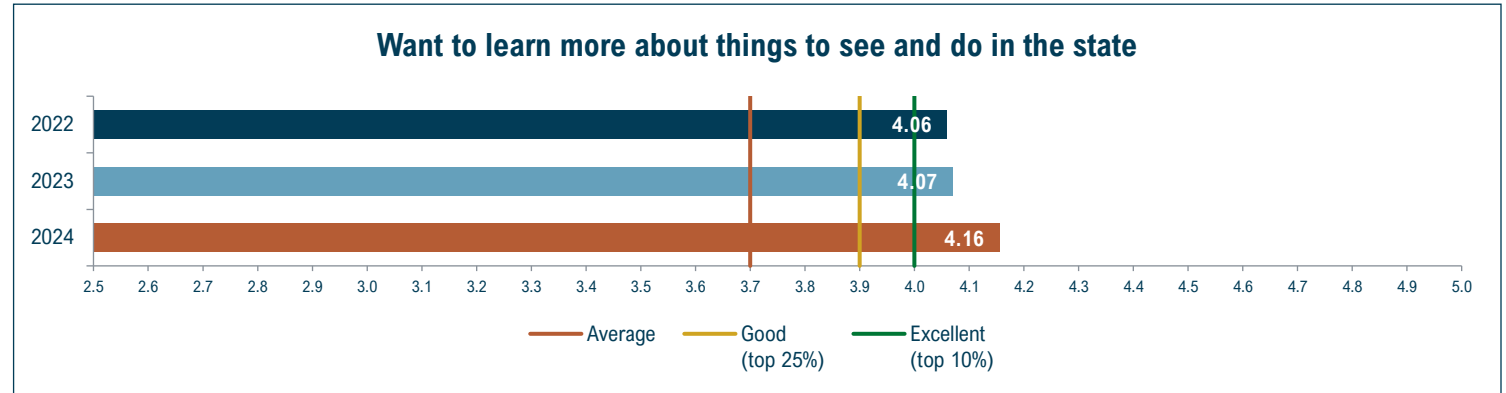
Evaluation of Campaign

- This year, a new set of attributes were developed to further evaluate the campaign. These attributes are designed to help understand how the ads make viewers feel.
- The campaign performed well above the top 10% benchmark for every attribute aside from *conveys a sense of belonging* which landed the average performance range.



Impact Attributes

- The campaign continues perform at the top 10% level for both encouraging consumers to learn more and want to visit New Hampshire, both of which reached historic high ratings this year.



A woman with long hair is walking away from the camera on a wooden covered bridge. The bridge has a gabled roof and a sign that reads "PEMIGEWAS RIVER". The bridge is surrounded by trees and a river. The overall scene is in a natural, wooded setting.

Spring/Summer Advertising Influence & ROI

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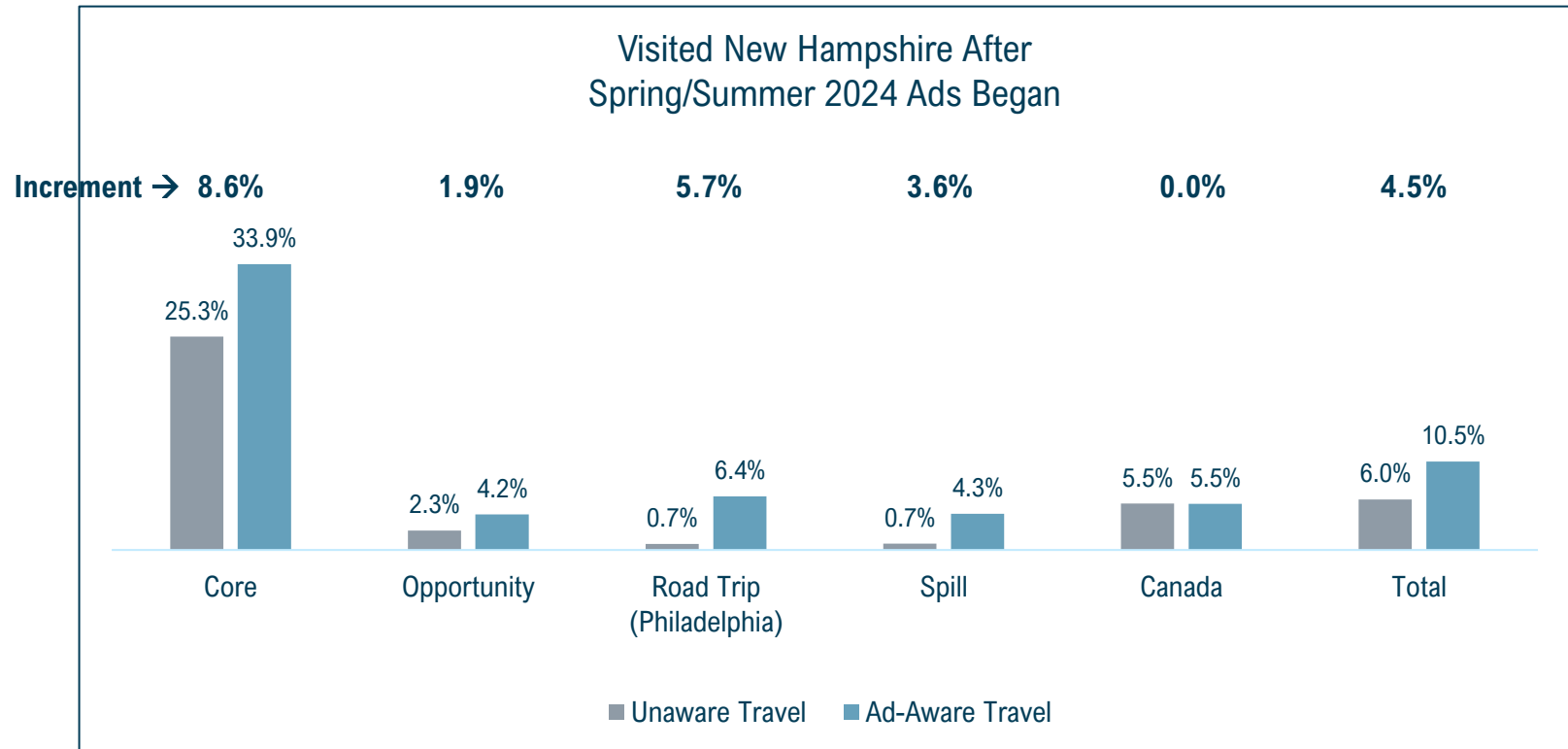
Incremental Travel Review

- SMARInsights' methodology for measuring advertising influence relies on establishing a base rate of travel. Certainly, New Hampshire travel would occur even without any paid advertising. Thus, not all visitation, or even visitation by 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, incremental travel is a conservative measure of influence.



2024 Spring/Summer Incremental Travel

- The 2024 spring/summer advertising influenced New Hampshire leisure travel from all market groups except Canada.
- The strongest travel increments were generated in the Core and Road Trip markets.



2024 Spring/Summer Ad-Influenced Trips

	Core	Opportunity	Road Trip (Philadelphia)	Spill	Canada	Total
Target HHs	2,951,376	1,854,939	2,487,168	9,197,815	951,374	17,442,671
Ad Awareness	64%	54%	52%	53%	50%	55%
Ad-Aware HHs	1,883,962	997,676	1,301,618	4,846,753	476,873	9,506,882
Incremental Travel	8.6%	1.9%	5.7%	3.6%	0.0%	4.5%
Incremental Trips	161,963	19,072	73,803	173,010	0	427,849

- The 2024 spring/summer advertising influenced about 428,000 New Hampshire leisure trips, most coming from the Core and Spill markets.

2024 Spring Summer Ad-Influenced Visitor Spending & ROI

	Core	Opportunity	Road Trip (Philadelphia)	Spill	Canada	Total
Incremental Trips	161,963	19,072	73,803	173,010	0	427,849
Avg. Trip Spending (among ad-aware visitors)	\$933	\$1,059	\$1,451	\$1,466	\$1,099	\$1,244
Ad-Influenced Trip Spending	\$151,172,404	\$20,196,067	\$107,074,530	\$253,626,285	\$0	\$532,069,285
Media Investment						\$2,618,377
ROI						\$203

- The 2024 spring/summer advertising influenced about \$532 million in visitor spending and returned \$203 in visitor spending for each \$1 invested in the advertising media.

Spring/Summer 2024 Tax ROI

	Core	Opportunity	Road Trip (Philadelphia)	Spill	Canada	Total
Incremental Trips	161,963	19,072	73,803	173,010	0	427,849
Avg. Taxable Trip Spending (among ad-aware visitors)	\$727	\$712	\$1,083	\$1,053	\$862	\$919
Ad-Influenced Taxable Trip Spending	\$117,735,949	\$13,587,385	\$79,897,522	\$182,142,294	\$0	\$393,363,150
Taxes Generated	\$10,007,556	\$1,154,928	\$6,791,289	\$15,482,095	\$0	\$33,435,868
Media Investment						\$2,618,377
Tax ROI						\$12.77

- In terms of tax revenue, the 2024 spring/summer advertising returned about \$13 for each \$1 invested in the advertising media.

Spring/Summer ROI Tracking

	Spring/Summer 2018	Spring/Summer 2019	Summer 2020	Spring/Summer 2021	Spring/Summer 2022	Spring/Summer 2023	Spring/Summer 2024	% Change 2023 to 2024
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,051	17,442,671	0.1%
Ad Awareness	43%	44%	43%	41%	46%	50%	55%	9.0%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	9,506,882	8.7%
Incremental Travel	6.5%	4.4%	3.1%	4.2%	4.6%	5.7%	4.5%	-21.0%
Incremental Trips	399,487	317,107	160,763	438,804	594,332	494,462	427,849	-13.5%
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042	\$1,053	\$1,202	\$1,312	\$1,130	\$1,244	10.1%
Ad-Influenced Trip Spending	\$321,101,120	\$330,339,600	\$169,243,990	\$527,237,760	\$779,563,175	\$558,680,848	\$532,069,285	-4.8%
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926,517	\$2,448,674	\$2,618,377	6.9%
ROI	\$179	\$182	\$199	\$222	\$266	\$228	\$203	-10.9%
Avg. Taxable Trip Spending (among ad-aware visitors)	\$598	\$680	\$603	\$778	\$882	\$844	\$919	8.9%
Ad-Influenced Taxable Trip Spending	\$238,957,240	\$215,567,826	\$97,014,255	\$341,556,238	\$524,184,858	\$417,480,042	\$393,363,150	-5.8%
Taxes Generated	\$21,506,152	\$19,401,104	\$8,731,283	\$30,740,062	\$44,555,713	\$35,485,804	\$33,435,868	-5.8%
Tax ROI	\$11.99	\$10.68	\$10.28	\$12.96	\$15.22	\$14.49	\$12.77	-11.9%

- While the spring/summer 2024 campaign generated higher awareness than the 2023 campaign, the level of ad-influenced travel, ad-influenced trips, visitor spending, and ROI are all down year-over-year. The strong ROIs generated in 2022 and 2023 are indicative of the post-pandemic recovery boom that New Hampshire experienced. Now, in 2024, overall New Hampshire travel and ROI results are normalizing.

Total Fiscal Year ROI



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Fall

- The more focused marketing strategy in fall 2023 resulted in higher levels of ad awareness and incremental travel, but the smaller and closer-by household base meant lower average visitor spending, less ad-influenced visitor spending, and a lower ROI compared to last year.

	Fall 2022	Fall 2023	% Change
Target HHs	21,562,811	17,429,051	-19%
Ad Awareness	37%	43%	17%
Ad-Aware HHs	8,049,391	7,564,316	-6%
Incremental Travel	1.30%	1.41%	8%
Incremental Trips	105,635	106,641	1%
Avg. Trip Spending (among ad-aware visitors)	\$1,181	\$973	-18%
Ad-Influenced Trip Spending	\$124,806,730	\$103,739,534	-17%
Media Investment	\$226,338	\$206,000	-9%
ROI	\$551	\$504	-9%
Avg. Taxable Trip Spending (among ad-aware visitors)	\$827	\$701	-15%
Ad-Influenced Taxable Trip Spending	\$87,401,514	\$74,765,063	-14%
Taxes Generated	\$7,429,129	\$6,355,030	-14%
Tax ROI	\$33	\$31	-7%

Winter

- 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.

	Winter 2022-2023	Winter 2023-2024	% Change
Target HHs	5,519,065	4,474,498	-19%
Ad Awareness	61%	42%	-31%
Ad-Aware HHs	3,371,419	1,901,073	-44%
Incremental Travel	2.80%	3.2%	14%
Ad-Influenced Trips	96,073	61,466	-36%
Average Trip Spending	\$1,492	\$1,368	-8%
Ad-Influenced Spending	\$143,382,835	\$84,065,167	-41%
Media Investment	\$406,766	\$473,125	16%
ROI	\$352	\$178	-49%
Avg. Taxable Trip Spending	\$1,023	\$1,098	7%
Ad-Influenced Taxable Spending	\$98,327,450	\$67,495,255	-31%
Taxes Generated	\$8,849,470	\$5,737,097	-35%
Media Investment	\$406,766	\$473,125	16%
Tax ROI	\$21.76	\$12.13	-44%

Spring/Summer

- While the spring/summer 2024 campaign generated higher awareness than the 2023 campaign, the level of ad-influenced travel, ad-influenced trips, visitor spending, and ROI are all down year-over-year.
- The strong ROIs generated from 2021 to 2023 are indicative of the post-pandemic recovery boom that New Hampshire experienced. Now, in 2024, overall New Hampshire travel and ROI results are beginning to normalize.

	Spring/Summer 2023	Spring/Summer 2024	% Change 2023 to 2024
Target HHs	17,429,051	17,442,671	0.1%
Ad Awareness	50%	55%	9.0%
Ad-Aware HHs	8,742,575	9,506,882	8.7%
Incremental Travel	5.7%	4.5%	-21.0%
Incremental Trips	494,462	427,849	-13.5%
Avg. Trip Spending (among ad-aware visitors)	\$1,130	\$1,244	10.1%
Ad-Influenced Trip Spending	\$558,680,848	\$532,069,285	-4.8%
Media Investment	\$2,448,674	\$2,618,377	6.9%
ROI	\$228	\$203	-10.9%
Avg. Taxable Trip Spending (among ad-aware visitors)	\$844	\$919	8.9%
Ad-Influenced Taxable Trip Spending	\$417,480,042	\$393,363,150	-5.8%
Taxes Generated	\$35,485,804	\$33,435,868	-5.8%
Tax ROI	\$14.49	\$12.77	-11.9%

Total FY2023/2024 ROI

- Accounting for all FY2023/24 campaigns, the advertising influenced \$720 million in visitor spending, \$46 million in tax revenue, and visitor spending and tax ROIs of \$218 and \$14, respectively.

	Fall 2023	Winter 2023/2024	Spring/Summer 2024	Total FY 2023/2024
Ad-Influenced Trips	106,641	61,466	427,849	595,956
Avg. Trip Spending (among ad-aware visitors)	\$973	\$1,368	\$1,244	\$1,208
Ad-Influenced Trip Spending	\$103,739,534	\$84,065,167	\$532,069,285	\$719,873,986
Avg. Taxable Trip Spending (among ad-aware visitors)	\$701	\$1,098	\$919	\$899
Ad-Influenced Taxable Trip Spending	\$74,765,063	\$67,495,255	\$393,363,150	\$535,623,467
Taxes Generated	\$6,355,030	\$5,737,097	\$33,435,868	\$45,527,994
Media Investment	\$206,000	\$473,125	\$2,618,377	\$3,297,502
ROI	\$504	\$178	\$203	\$218
Tax ROI	\$31	\$12	\$13	\$14

Total FY ROI Comparison

	Total Fiscal Year 2017/2018	Total Fiscal Year 2018/2019	Total Fiscal Year 2019/2020	Total Fiscal Year 2020/2021	Total Fiscal Year 2021/2022	Total Fiscal Year 2022/2023	Total Fiscal Year 2023/2024
Influenced Trips	604,055	636,170	555,681	529,505	743,727	696,170	595,956
Avg. Trip Spending (among ad-aware visitors)	\$839	\$900	\$1,103	\$1,101	\$1,288	\$1,188	\$1,208
Influenced Trip Spending	\$506,679,581	\$572,280,741	\$613,102,160	\$583,077,833	\$958,161,359	\$826,870,413	\$719,873,986
Avg. Taxable Trip Spending (among ad-aware visitors)	\$586	\$583	\$736	\$751	\$871	\$866	\$899
Influenced Taxable Trip Spending	\$353,937,438	\$370,684,548	\$408,746,075	\$397,603,983	\$647,472,232	\$603,209,006	\$535,623,467
Taxes Generated	\$31,854,370	\$33,361,609	\$36,787,146	\$35,784,358	\$55,035,140	\$51,272,765	\$45,527,994
Media Spending	\$2,481,988	\$2,567,179	\$1,545,410	\$2,962,296	\$3,450,473	\$3,081,778	\$3,297,502
ROI	\$204	\$223	\$397	\$197	\$278	\$268	\$218
Tax ROI	\$13	\$13	\$24	\$12	\$16	\$17	\$14

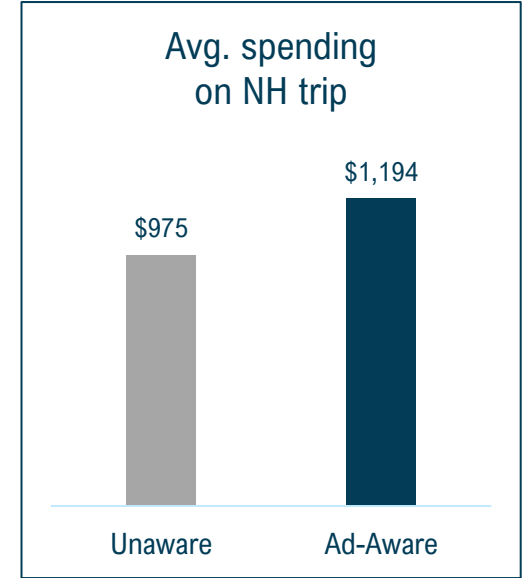
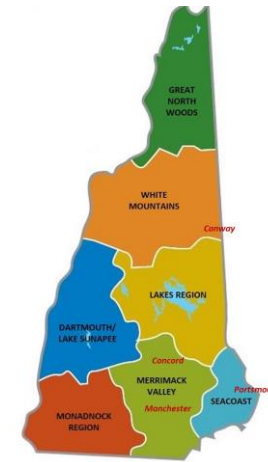
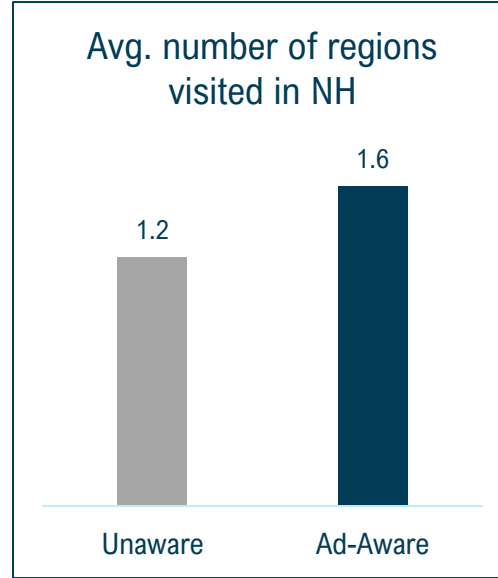
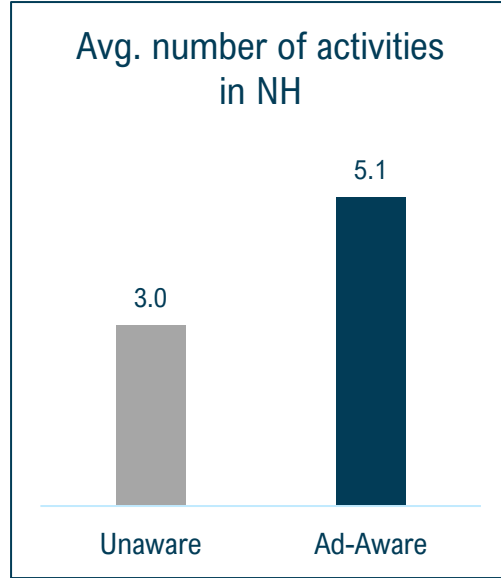
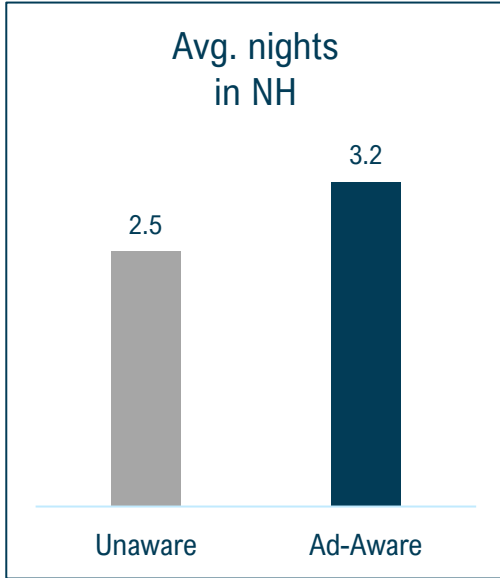
- Total FY2023/2024 ROI is down a bit compared to the past two years. A more focused marketing strategy targeting fewer households in fall 2023 resulted in higher levels of ad awareness and incremental travel, but the smaller and closer-by household base meant lower average visitor spending, less ad-influenced visitor spending, and a lower ROI compared to last year. Winter 2023/2024 was negatively impacted by below average snowfall. Lower spring/summer results in 2023/2024 align with normalizing New Hampshire travel patterns after the post-COVID boom.



Ad Influence on the New Hampshire Trip

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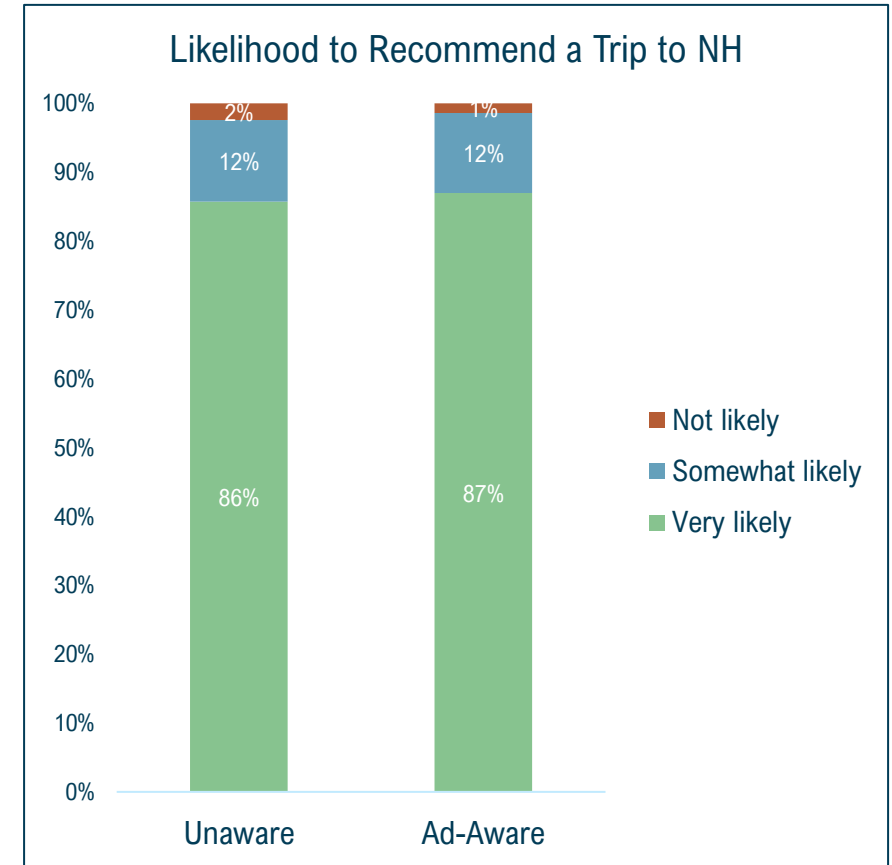
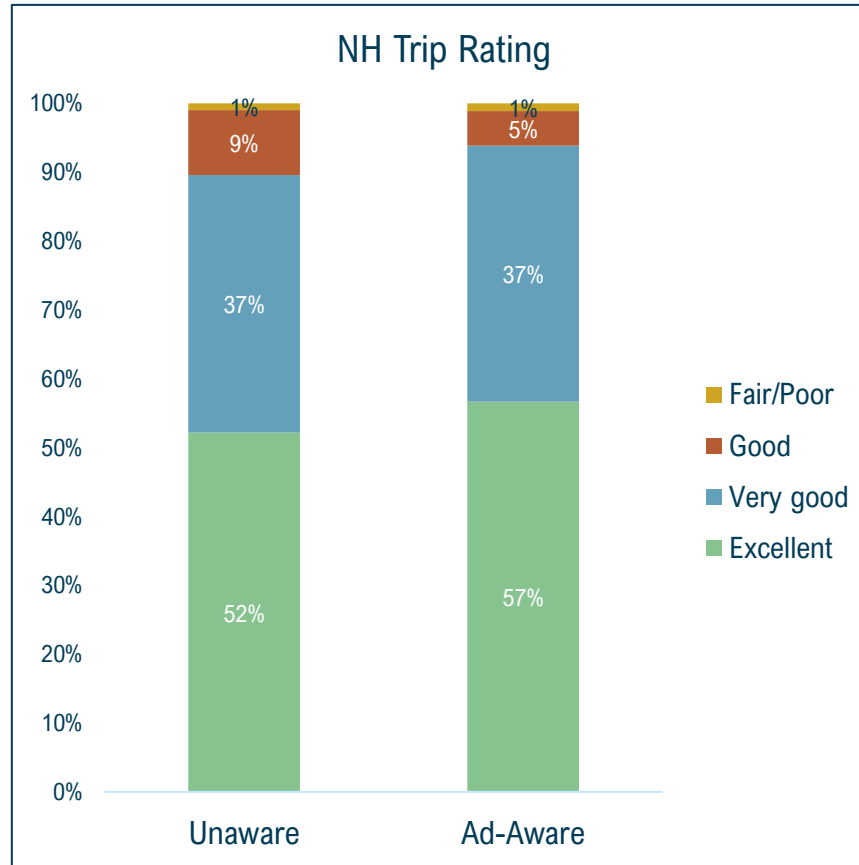
Ad Influence on the New Hampshire Trip



- As in prior years, the advertising not only influenced New Hampshire leisure travel, but it also gave visitors ideas that led to longer, more active trips with higher average spending.

Ad Influence on the New Hampshire Trip

- Ad-aware visitors are also more likely than unaware visitors to rate their New Hampshire trip “excellent”.
- There is no difference in likelihood to recommend New Hampshire between the unaware and ad-aware. Both groups are likely to recommend the state as place for a leisure trip.



Appendix: Spring/Summer ROI Questionnaire



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Questionnaire



New Hampshire Tourism
2024 Spring/Summer Ad Effectiveness Wave 2
August 2024

SCREENER MODULE

S1. What is your postal/ZIP code? _____

S3. Who in your household is responsible for making decisions concerning travel destinations?
Me
Me and my spouse/partner
My spouse/partner → TERMINATE

S2. Please indicate which of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, X, Instagram, or TikTok		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, Max, or Hulu		
I like to travel during the fall to view the changing leaves		
I engage in skiing, snowboarding, and/or other winter activities		
I am currently planning or have already planned an upcoming leisure trip		
I listen to Pandora Radio		

TERMINATE IF TRIP AND PLAN BOTH = 0

S4. What is your age? _____ [TERMINATE under 18 - over 65]

S5. Which of the following social networking sites do you use?

Select all that apply.

- Pinterest
- Snapchat
- Instagram
- YouTube
- X
- Facebook
- Travel review sites such as TripAdvisor
- TikTok
- Other, please specify _____
- None of these

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1



PERCEPTIONS MODULE

P2. 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				

P3. How likely are you to take a leisure trip to any of 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					

TRAVEL MODULE

T1. Have you traveled to or within any of the following states for a leisure trip in 2024? How many trips did you take to or within each state in 2024?

[ROTATE]	States visited in 2024	Number of visits in 2024
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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2



SKIP TO AD SECTION IF NOT HEW HAMPSHIRE VISITOR AT T1.

T2. When in 2024 did you travel to or within New Hampshire?

January	
February	
March	
April	
May	
June	
July	
August	
September	

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

T3. Including you, how many people were in your travel party? ____

ASK T4 IF T3 > 1

T4. Of those, how many were children under age 18? ____

T4a. What mode(s) of transportation did you use to travel to New Hampshire? Select all that apply.

- Airplane
- Personal car/truck/van
- Electric personal car/truck/van
- Rental car/truck/van
- Electric rental car/truck/van
- RV
- Bus
- Other

T5. How many nights did you spend in New Hampshire during this trip? ____

ASK T6 IF T5 > 0

T6. What type of lodging did you use during your trip?

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

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3

Questionnaire

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T7. Which of the following activities did you participate in during your trip to or within New Hampshire?

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	
River rafting	Farm to table dinner	
Fishing	Winery tours	
Visiting museums	Beer trail	
Attending a play or concert	Farmer's markets/U-picks/roadside stand	
Attending a festival or fair	Canoeing or kayaking	
Attending performing arts (music/theater)	Boating	
Visiting historical sites		
	Other, please specify _____	
	None of these	

SHOW THE ACTIVITIES SELECTED IN T7 AND ASK:

T8. Of these activities/attractions, please indicate if there were any that were a major influence when you selected the destination for this trip. You may choose up to 3.

SHOW NEW HAMPSHIRE REGIONS MAP AND ASK T9.

T9. Which of the following regions did you visit during your trip?

T10. Thinking about your overall travel experience in New Hampshire on this most recent trip, would you say it was...?

- Excellent
- Very good
- Good
- Fair
- Poor

T11. 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. Your 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	

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Arts, entertainment, and recreation	
Retail sales	
Visitor air	
Other	
Total	SHOW TOTAL

T13. How likely are you to recommend a trip to New Hampshire?

- Very likely
- Somewhat likely
- Not likely

T13 AND T14 ARE TO ADDRESS AGRITOURISM.

T13. Did you visit or participate in any of the following on your trip?
ROTATE, ANCHOR "NONE"

- Retreat and rendezvous centers
- Nature centers
- Farm tours
- Farm-based lodging
- Cross-country ski or snowshoe trails
- Country overnight bed and breakfast
- Bird and big-game hunting preserves
- Bird and wildlife watching
- Corn mazes or haunted forests
- Petting farms
- Hands-on U-pick
- Winery/vineyard
- Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides
- Farmers markets
- Rural wedding
- None of these

T14. Please estimate how much your travel party spent in total on the following activities/attractions...

SHOW ALL OF THOSE THAT THEY DID FROM T13. INCLUDE ONLY ONE NUMERIC BOX – WE JUST WANT TOTAL SPENDING ON ALL THINGS COMBINED	
---	--

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AD AWARENESS MODULE

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

MONTREAL AND QUEBEC CITY ONLY

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMAR Testing Assets (1)\Summer 2024\Display\Canada (Montreal, Quebec City)

			
DTTD_2024 Summer_Retargeting_Fren 300x600	DTTD_2024 Summer_Canada_Adventure 300x600	DTTD_2024 Summer_Canada_Family 300x600	DTTD_2024 Summer_Canada_Relaxation 300x600

BOSTON, PORTLAND, PROVIDENCE, OTHER NORTHEAST

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMAR Testing Assets (1)\Summer 2024\Display\Core (Boston, Portland and Providence)

			
DTTD_2024 Summer_Core_Family 300x600	DTTD_2024 Summer_Core_Adventure 300x600	DTTD_2024 Summer_Core_Relaxation 300x600	DTTD_2024 Summer_Retargeting_English 300x600

Hartford, New Haven, Fairfield, CT and NY Counties

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMAR Testing Assets (1)\Summer 2024\Display\Opportunity (Hartford, New Haven, Fairfield, CT and NY Counties)

			
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6

Questionnaire

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SummerRetargetingEnglish300x600	DTTD_2024 Summer_Opportunity_Adventure_300x600	DTTD_2024 Summer_Opportunity_Family_300x600	DTTD_2024 Summer_Opportunity_Relax_300x600
---------------------------------	--	---	--

PHILADELPHIA ONLY

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\Display\Road Trip (Philadelphia)

DTTD_2024 Summer_Retargeting_English_300x600	DTTD_2024 Summer_Road_Trip_Adventure_300x600	DTTD_2024 Summer_Road_Trip_Family_300x600	DTTD_2024 Summer_Road_Trip_Relax_300x600

Have you seen this or a similar online ad before now?

- Yes, I have seen this ad before
- No, I have not seen this ad before

SEM:

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\SEM (Core, Opportunity, Road Trip, Canada)|USE



Have you seen any of these or similar online ads before now?

- Yes, I have seen this ad before
- No, I have not seen this ad before

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RICH MEDIA:

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\Rich Media Units (Road Trip, Opportunity, Canada)

https://vimeo.com/956038615 AdTheorent_Accordian 60 sec, force 15sec	https://vimeo.com/956038835 AdTheorent_Interactive Display 10 sec	https://vimeo.com/956038863 AdTheorent_Interscrollers_Adults 22 sec, force 15 sec
https://vimeo.com/956038447 AdTheorent_Interscrollers_Family 21 sec, force 15 sec	https://vimeo.com/956038547 AdTheorent_Social Amplification_Adult 10 sec	https://vimeo.com/956038590 AdTheorent_Social Amplification_Family 11 sec

Have you seen this or a similar online ad before now?

- Yes, I have seen this ad before
- No, I have not seen this ad before

TV/Pre-Roll:

DO AIA FOR THIS SECTION

30sec

https://vimeo.com/956014503	https://vimeo.com/956014348

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15Sec

https://vimeo.com/956014713	https://vimeo.com/956014936	https://vimeo.com/956014787

SummerTV. Have you seen this or a similar ad before now?

- Yes
- No

SOCIAL ADS:
ASK IF 55 > 0

MONTRÉAL AND QUÉBEC CITY ONLY

English:

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\Paid Social\Canada (Montreal, Quebec City)\English\USE



Questionnaire

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French:
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\Paid Social\Canada (Montreal, Quebec City)\French\USE



BOSTON, PORTLAND, PROVIDENCE, OTHER NORTHEAST
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\Paid Social\Core (Boston DMA, Portland DMA and Providence DMA)\Carouse\USE



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Hartford, New Haven, Fairfield, CT and NY Counties ONLY
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\Paid Social\Opportunity (Hartford DMA, New Haven, Fairfield, CT and NY Counties)\USE



PHILADELPHIA ONLY
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\Paid Social\Road Trip (Philly DMA)\USE



Have you seen this or a similar social media ad before now?
Yes, I have seen this ad before
No, I have not seen this ad before

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OOH:
PHILADELPHIA ONLY
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\Philadelphia Airport



I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\OOH\Road Trip (Philly DMA)\USE

MONTREAL AND QUEBEC CITY ONLY
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\OOH\Canada (Montreal, Quebec City)



HARTFORD NEW HAVEN, FAIRFIELD, CT AND NY COUNTIES ONLY
I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets
(1)\Summer 2024\OOH\Opportunity (Hartford, New Haven, Fairfield, CT and NY Counties)

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Questionnaire

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BOSTON, PROVIDENCE, OTHER NORTHEAST

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\OOH\Care (Boston, Providence)



Kayak_Billboard mockup



Telescope_English_Billboard mockup

BOSTON ONLY



Boston Video Wall 30 sec

<https://vimeo.com/956030304>

Have you seen this or a ad before now?

- Yes
- No

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PRINT:

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\Print - Yankee Co-op



Yankee-Magazine MockUp

Have you seen this or a similar print ad before now?

- Yes
- No

AUDIO:

DO AIA FOR THIS SECTION

I:\Ads Master\New Hampshire\2024\2024 New Hampshire Summer\Summer 2024 SMARI Testing Assets (1)\Summer 2024\Streaming Audio

<p>https://vimeo.com/956048798 SPOTIFY US NEW HAMPSHIRE APR PRE MEMORIAL DAY OPT 2 27 sec</p>	<p>https://vimeo.com/956051862 SPOTIFY US NEW HAMPSHIRE APR POST MEMORIAL DAY OPT 2 27 sec</p>	<p>https://vimeo.com/956061055 Stack Adapt English Spot 30 sec</p>

Have you heard this or a similar audio ad before now?

- Yes
- No

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DEMO MODULE

The following questions are for classification purposes only so that your responses may be grouped with those of others.

- D1. Are you currently ...?
Married/living as married
Divorced/Separated
Widowed
Single/Never married
- D2. Including you, how many people are currently living in your household? _____ [IF 1, SKIP TO D4]
- D3. How many living in your household are children under the age of 18? _____
- D4. 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
- D5. Which of the following categories best represents your total annual household income before taxes?
Less than \$35,000
\$35,000 but less than \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$150,000
\$150,000 but less than \$200,000
\$200,000 or more
- D6. Which of the following best describes your ethnic heritage? Are you...? (ALLOW MULTI)
Caucasian/White
African American/Black
Asian
American Indian
Native Hawaiian or Other Pacific Islander
Other (Specify _____)
- D7a. Do you identify as Hispanic or Latino?
Yes
No
- D7. What is your preferred gender identity ...?
Male
Female
Other
Prefer not to answer

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