



New Hampshire

LIVE FREE

2022 Spring/Summer
Advertising Effectiveness
Wave 2 ROI Research

September 2022

 **insights**
Strategic Marketing and Research

Background & Objectives

- The New Hampshire Division of Travel and Tourism Development (DTTD) expanded its 2022 spring/summer advertising spend in core and long drive markets and renewed efforts in Canada now that the border has reopened.
- The advertising is a continuation of the 2021 “Discover Your New” campaign along with some refreshed efforts. For the Canadian markets, this represents the first running of these assets.
- DTTD has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess 2022 spring/summer advertising effectiveness. An initial ad awareness/creative evaluation research wave was completed in July 2022. 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 wave include:
 - Reviewing the wave 1 results
 - Assessing the advertising influence on New Hampshire travel during spring/summer 2022
 - Exploring the results by market groups
 - Reviewing ad impact on the New Hampshire trip
 - Providing insights to guide marketing decision-making

Methodology

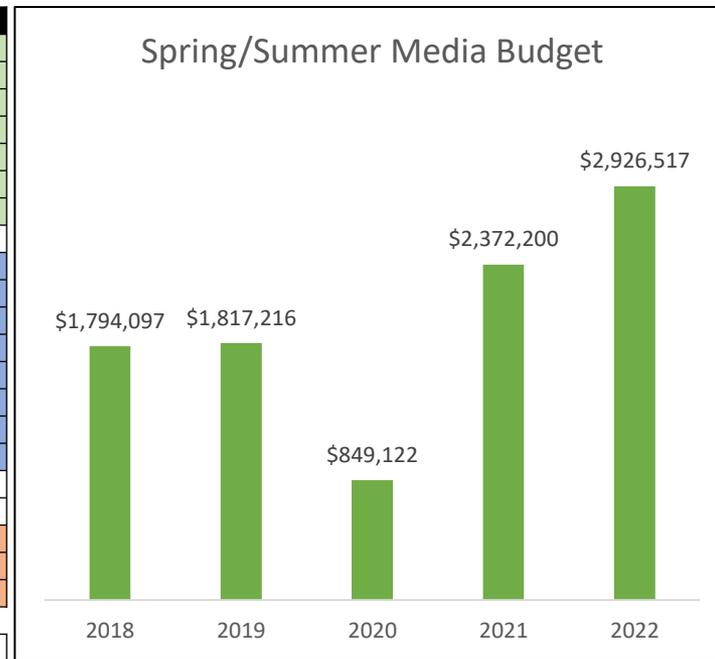
- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. This method provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents must be 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 2022 spring/summer advertising was aimed at existing northeastern core markets and more distant “long drive” markets. Additionally, two Canadian markets are also included. Ad spending by market is provided on the following page.
- A total of 2,303 surveys were completed in September 2022. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the ROI research results.

Market Group	Market	Completed Surveys
Core Markets	New Hampshire	95
	Connecticut	102
	Massachusetts	209
	Rhode Island	100
	Maine	93
	New York	296
Long Drive	New Jersey	202
	Pennsylvania	200
	Delaware	96
	Maryland	155
	Virginia	151
	North Carolina	150
	Ohio	150
Canada	Toronto	154
	Montreal	150
	Total	2,303

Campaign Overview



Channel	Print	TV	OOH	Display	CTV	Pandora	Social	TOTAL
MA	\$7,246	\$12,000	\$201,100	\$36,587	\$9,334	\$11,500	\$18,481	\$296,247
RI	\$7,246	\$175,161	\$10,600	\$49,837	\$21,334	\$15,668	\$18,481	\$298,326
CT	\$7,246	\$110,787	\$26,840	\$49,837	\$21,334	\$15,668	\$18,481	\$250,192
ME	\$7,246	\$12,000	\$0	\$36,587	\$9,334	\$11,500	\$18,481	\$95,147
NH	\$7,246	\$124,381	\$8,560	\$36,587	\$9,334	\$11,500	\$18,481	\$216,088
NY	\$7,246	\$198,660	\$653,105	\$49,837	\$21,334	\$15,669	\$18,481	\$964,331
Core Total	\$43,475	\$632,989	\$900,205	\$259,269	\$92,004	\$81,505	\$110,886	\$2,120,333
DE	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,692	\$76,788
NC	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,692	\$76,788
PA	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,692	\$76,788
VA	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,693	\$76,789
NJ	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,693	\$76,789
MD	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,693	\$76,789
OH	\$0	\$14,315	\$0	\$24,569	\$17,428	\$9,785	\$10,693	\$76,789
Long Drive Total	\$0	\$100,202	\$0	\$171,981	\$121,996	\$68,495	\$74,848	\$537,521
Montreal	\$0	\$43,905	\$30,971	\$39,375	\$3,000	-	\$11,000	\$128,252
Toronto	\$0	\$40,086	\$46,950	\$39,375	\$3,000	-	\$11,000	\$140,411
Canada Total	\$0	\$83,992	\$77,921	\$78,750	\$6,000	\$0	\$22,000	\$268,663
TOTAL	\$43,475	\$817,182	\$978,126	\$510,000	\$220,000	\$150,000	\$207,734	\$2,926,517



- The 2022 spring/summer campaign included print, TV/CTV, out-of-home, digital display, Pandora, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The ads invite viewers to “Discover Your New” and feature New Hampshire’s outdoor, small town, road trip, and family-friendly activities and attractions.
- The media investment was increased as can be seen in the chart; it was about 23% larger than last year and 12% higher in existing markets.

Insights: Wave 1 Review

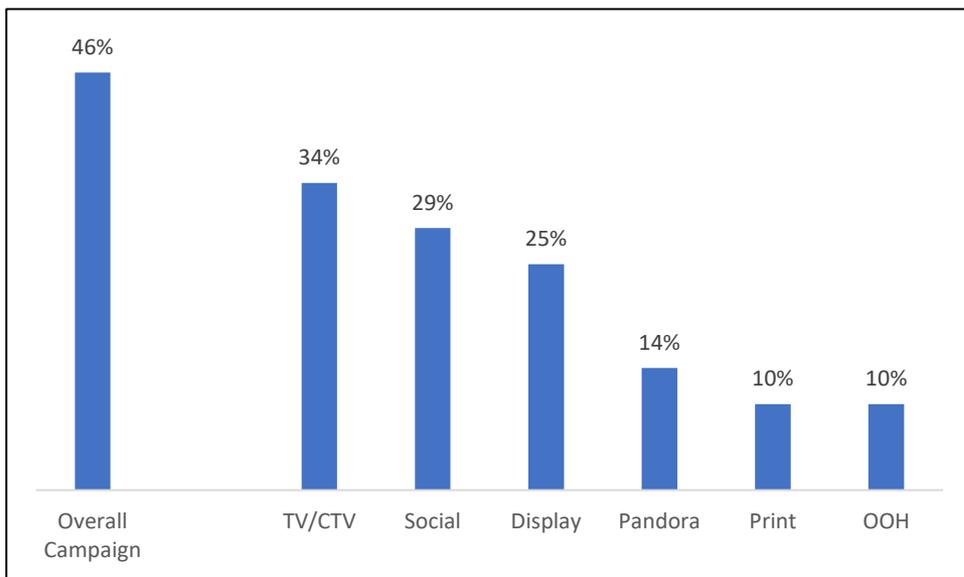
- The 2022 spring/summer advertising generated 46% awareness, translating into about 12.8 million ad-aware households and an efficient cost per aware household of \$0.23.
- The biggest gains in awareness were seen in the domestic markets where an 8-point awareness gain was achieved reflective of ad wear-in and the increase in media spend. The awareness results in Canada, while more modest, should be expected after a dark period and the introduction of a new campaign effort.
- Reaction to the 2022 advertising remains positive, although it has slipped slightly over last year's measure suggesting an initial sign of wear-out.
- The Sea to Sky campaign did similarly well as other social assets, although it did result in more negative reaction – no doubt a reflection of its grittier approach.
- The 2022 advertising is “excellent” or “good” from an industry benchmarking standpoint at communicating key messages. From an evaluative ratings standpoint, the 2022 advertising is also excellent at generating interest in New Hampshire travel.
- The 2022 advertising has a positive yet weakening impact on top-of-mind consideration, familiarity, preference, and specific perceptions.
- While there are initial signs of wear-out with this campaign, the strong awareness and continued positive impacts suggested that this campaign would outperform last year's.

Insights: Ad Influence & ROI

- The spring/summer 2022 advertising influenced New Hampshire leisure travel from all market groups. The greatest travel increment was achieved in the core markets. While long-haul leisure travel is returning as we emerge from the pandemic, the advertising was still most effective in the nearby markets.
- Exposing consumers to advertising in multiple media was critical to influencing New Hampshire travel.
- In total, about 594,000 spring/summer 2022 New Hampshire trips were influenced by the advertising. About three-quarters of these ad-influenced trips came from the core markets. The core markets account for about a third of the target households, so they overperformed in terms of their contribution of ad-influenced trips compared to their population representation.
- The spring/summer 2022 advertising influenced about \$780 million in visitor spending. Given the media investment of \$2.9 million, the advertising returned \$266 in visitor spending for each \$1 invested in the media.
- The 2022 spring/summer advertising generated \$44.6 million in taxes and returned \$15.22 in tax revenue for each \$1 invested.
- The spring/summer 2022 advertising produced the highest ROI of the past five spring/summer campaigns.
- Accounting for all FY2021/22 campaigns, the advertising influenced \$958 million in visitor spending, \$55 million in tax revenue, and visitor spending and tax ROIs of \$278 and \$15.95, respectively. The total fiscal year 2021/2022 ROI is the second-highest of the past five fiscal years. Only fiscal year 2019/2020 produced a stronger ROI – when DTTD reduced the media investment in response to the pandemic and New Hampshire travel remained strong because of the state's outdoor product.

Wave 1 Review

2022 Ad Awareness Overall and by Medium

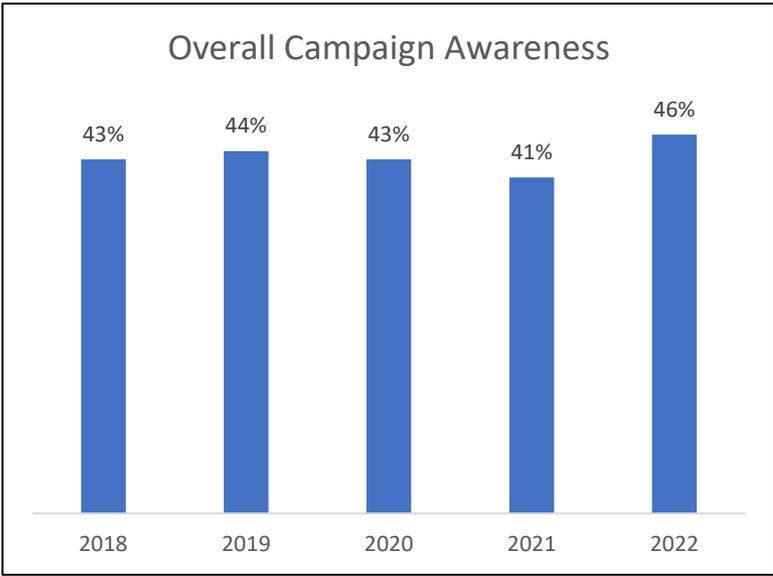


Target HHs	27,787,051
Ad Awareness	46%
Ad-Aware HHs	12,841,666
Media Investment	\$2,926,517
Cost per Aware HH	\$0.23



- Overall, the 2022 spring/summer advertising generated 46% awareness across all markets, which translates into about 12.8 million ad-aware households and a relatively efficient cost per aware household of \$0.23.
- TV/CTV had the highest awareness, followed by social and digital display.

Overall Campaign Awareness Compared to Recent Years

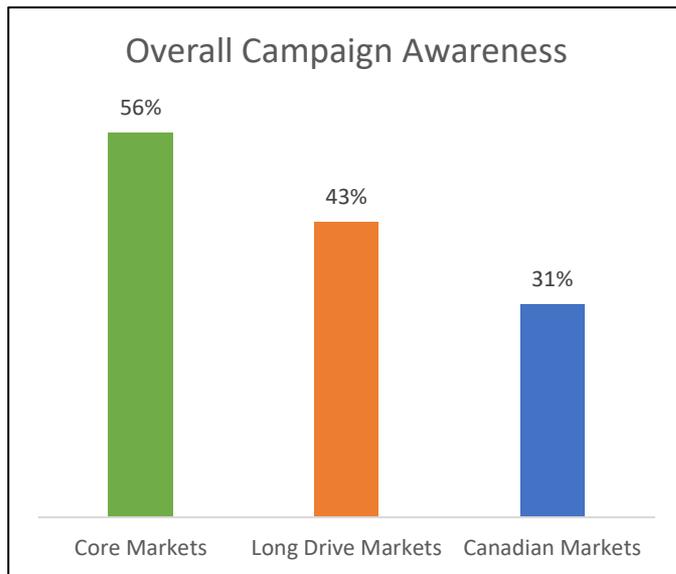


	2018	2019	2020	2021	2022
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051
Ad Awareness	43%	44%	43%	41%	46%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926,517
Cost per Aware HH	\$0.29	\$0.25	\$0.16	\$0.23	\$0.23

- The increased media spend yielded this corresponding gain in awareness. The highest media investment over the last five years was rewarded with the highest level of ad awareness.



2022 Overall Awareness by Market Group



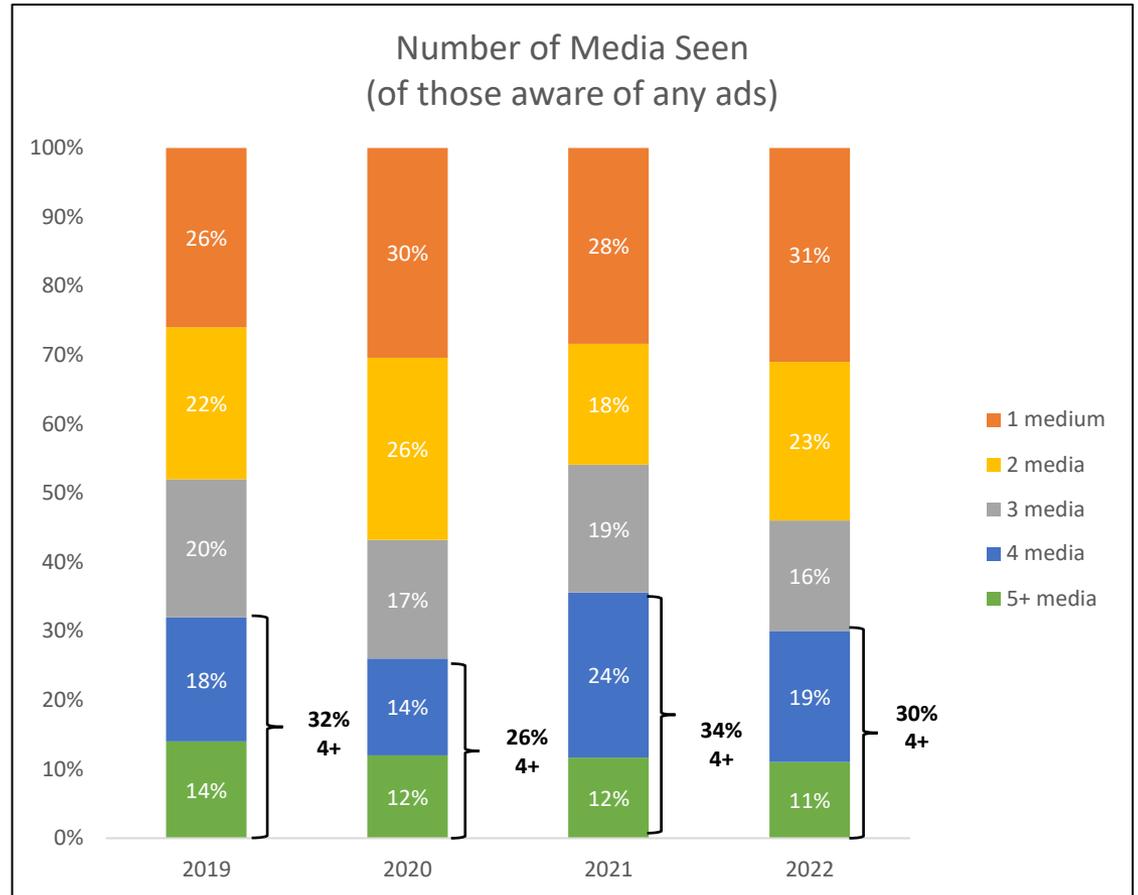
	Core Markets	Long Drive Markets	Canadian Markets
Target HHs	9,286,327	16,375,106	2,125,618
Ad Awareness	56%	43%	31%
Ad-Aware HHs	5,193,350	6,981,978	666,338
Media Investment	\$2,120,333	\$537,521	\$268,663
Cost per Aware HH	\$0.41	\$0.08	\$0.40



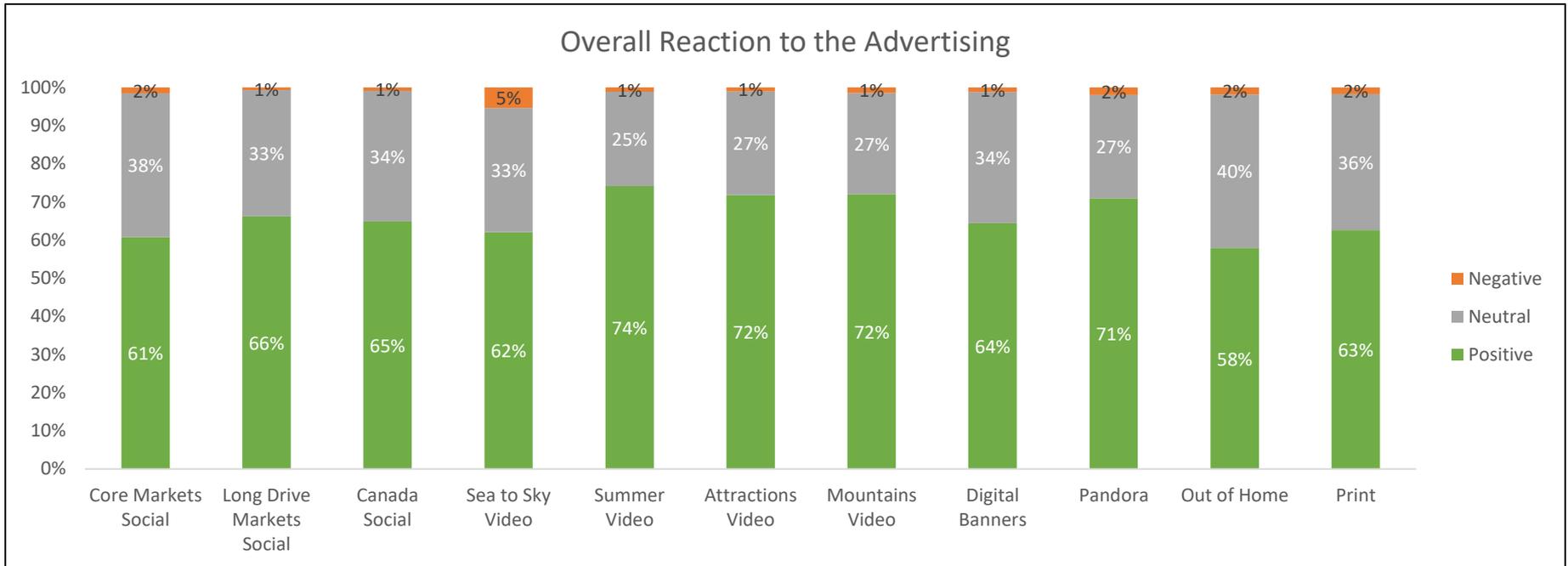
- With some changes in the makeup of the individual market groups, direct year-over-year comparisons are not completely reliable. However, these primary and secondary markets are quite similar, and each showed an 8-percentage point gain over last year.
- The results in Canada, while more modest, are reflective of the lower awareness levels that can be expected after a period of being dark and the introduction of a new campaign effort.

Media Overlap

- Exposing consumers to ads in multiple media boosts advertising impact. The various media relay different messages at different phases of the travel decision-making process.
- The reduction in the extent of overlap that is seen here is to be expected as campaign awareness grows (the ads are reaching new consumers rather than building overlap among existing ad-aware consumers).



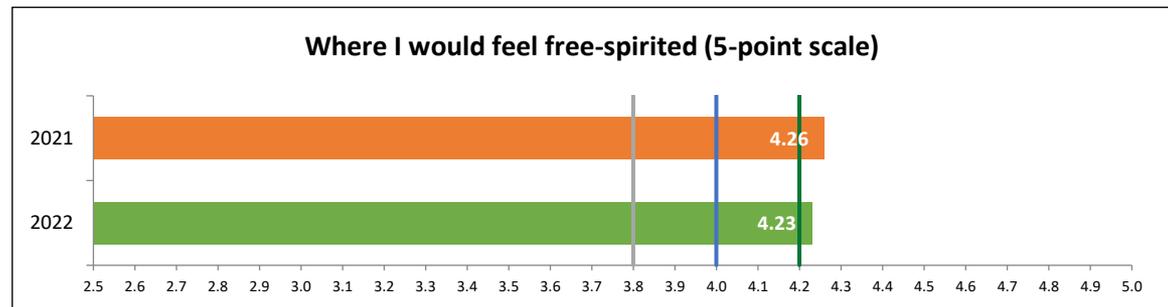
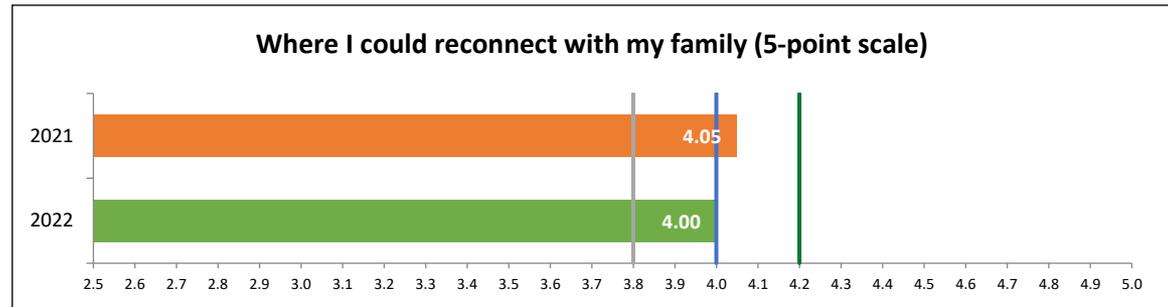
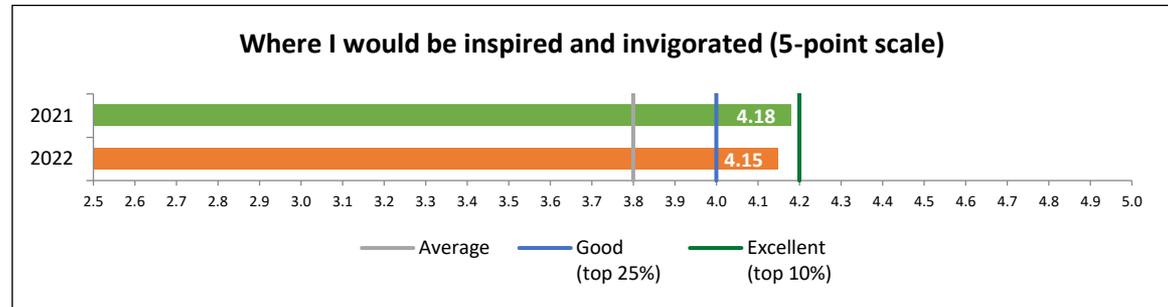
Overall Reaction



- The Sea to Sky video gets the largest portion of negative responses of any ad.
- While only 5% of responses are negative, this result is likely due to the gritty ad execution and should be considered in targeting this ad.

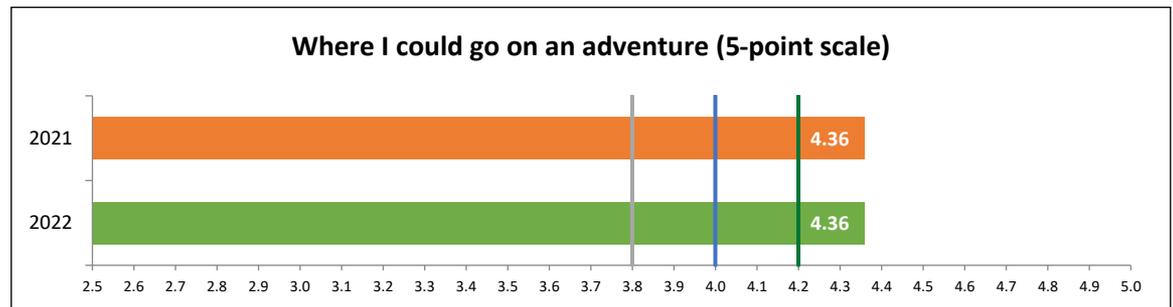
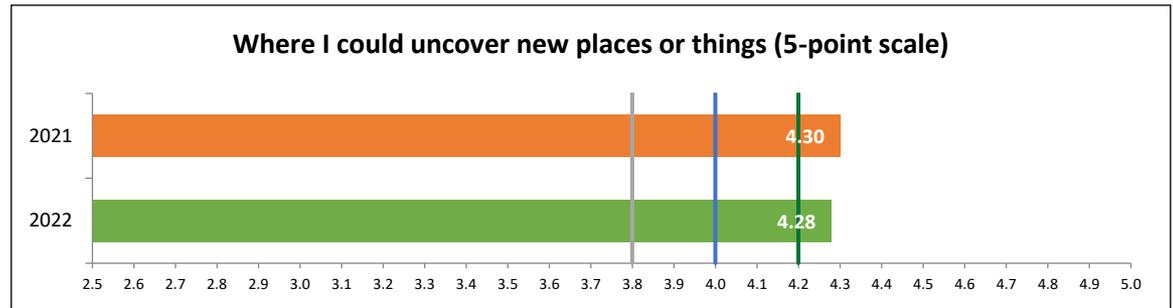
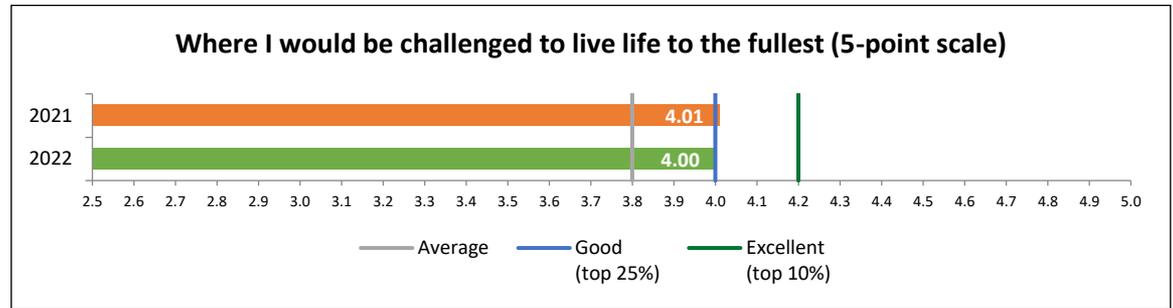
Communication Attributes

- We see some erosion in these communication ratings – although the scores continue to be quite good.
- In some ways this is surprising as those aware of ads typically rate them higher – and as such with increasing awareness we would expect these ratings to at least maintain. Again, this may be an early sign of wear-out.



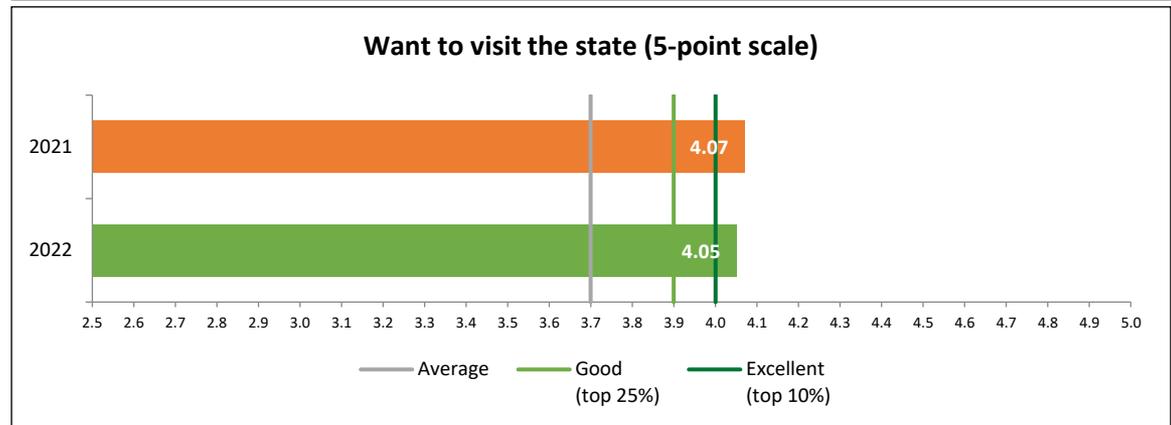
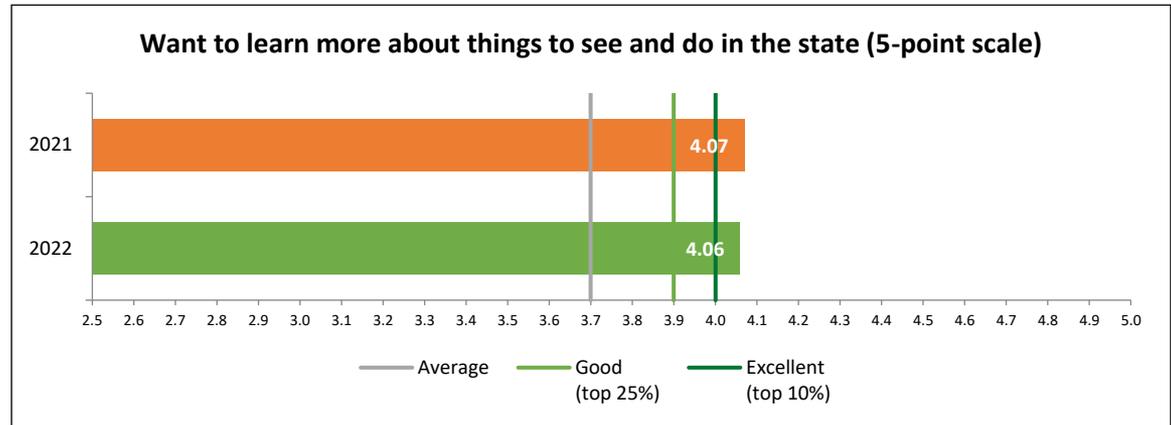
Communication Attributes Cont.

- With respect to these remaining communication attributes, we do not see declines with *live life to the fullest*, *adventure* and *uncover new things* – with the latter two being well into the excellent level.



Impact Attributes

- From this evaluative ratings standpoint, the 2022 advertising is excellent at generating interest in NH travel.
- This coupled with higher awareness and more aware households foreshadowed strong overall impact and potentially another record performance.



How much do you agree that these ads make you...?

Ad Influence & ROI

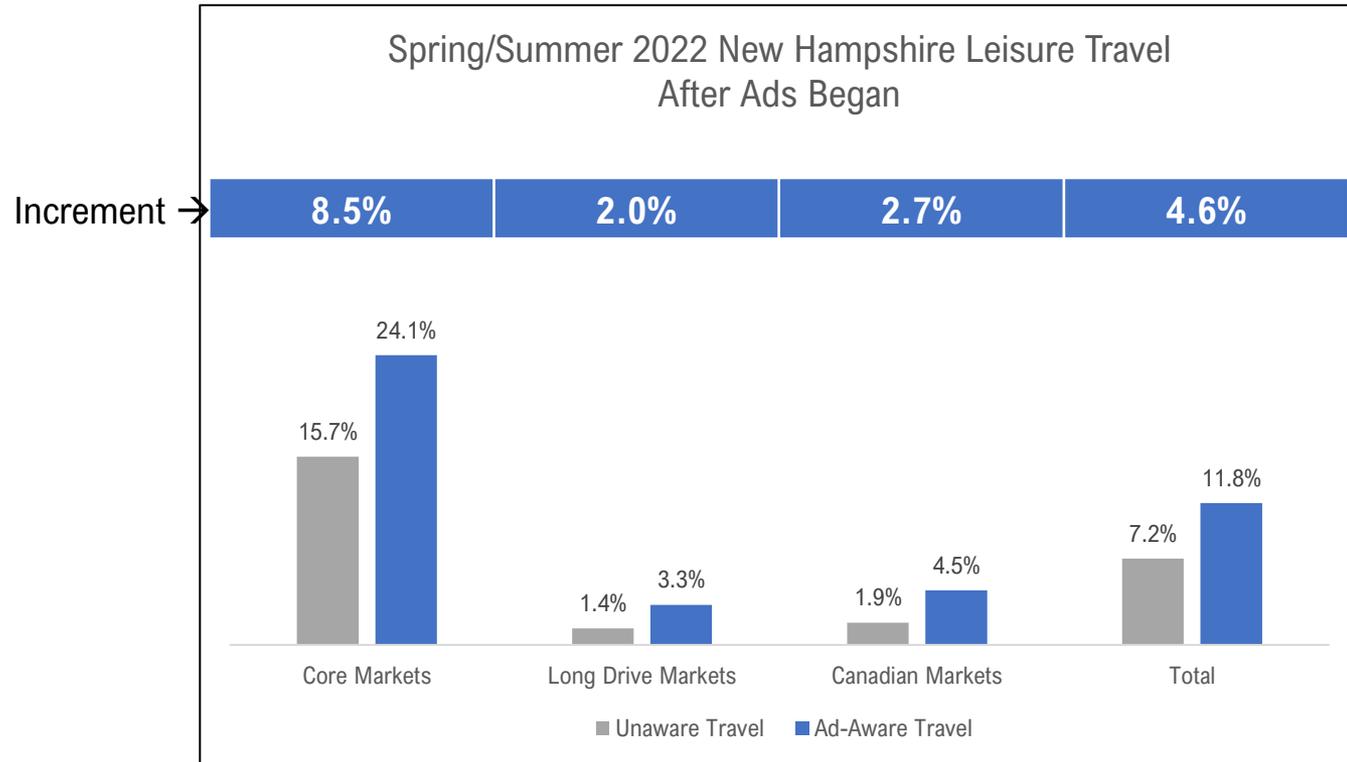
Incremental Travel Review

- SMARInsights' methodology for measuring 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. Not all visitation, or even visitation by aware households, is 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.



Spring/Summer 2022 Incremental Travel

- The spring/summer 2022 advertising influenced New Hampshire leisure travel from all market groups.
- The greatest travel increment was achieved in the core markets. While long-haul leisure travel is returning as we emerge from the pandemic, the advertising was still most effective in the nearby markets.
- The ad influence was similar in the long drive and Canadian markets.



Spring/Summer 2022 Ad-Influenced Trips

	Core Markets	Long Drive Markets	Canadian Markets	Total
Target HHs	9,286,327	16,375,106	2,125,618	27,787,051
Ad Awareness	56%	43%	31%	46%
Ad-Aware HHs	5,193,350	6,981,978	666,338	12,841,666
Incremental Travel	8.5%	2.0%	2.7%	4.6%
Incremental Trips	439,068	137,315	17,948	594,332

- In total, about 594,000 spring/summer 2022 New Hampshire trips were influenced by the advertising.
- About three-quarters of these ad-influenced trips came from the core markets.

Spring/Summer 2022 ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	439,068	137,315	17,948	594,332
Avg. Trip Spending (among ad-aware visitors)	\$1,085	\$1,880	\$2,517	\$1,312
Ad-Influenced Trip Spending	\$476,277,847	\$258,109,201	\$45,176,126	\$779,563,175
Media Investment	\$2,120,333	\$537,521	\$268,663	\$2,926,517
ROI	\$225	\$480	\$168	\$266

- The spring/summer 2022 advertising influenced about \$780 million in visitor spending.
- Given the media investment of \$2.9 million, the advertising returned \$266 in visitor spending for each \$1 invested in the media.
- ROI is highest in the long drive markets, where a comparatively small investment produced \$258 million in visitor spending.

Spring/Summer 2022 Tax ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	439,068	137,315	17,948	594,332
Avg. Taxable Trip Spending (among ad-aware visitors)	\$753	\$1,153	\$1,971	\$882
Ad-Influenced Taxable Trip Spending	\$330,499,737	\$158,312,136	\$35,372,985	\$524,184,858
Taxes Generated	\$28,092,478	\$13,456,532	\$3,006,704	\$44,555,713
Media Investment	\$2,120,333	\$537,521	\$268,663	\$2,926,517
Tax ROI	\$13.25	\$25.03	\$11.19	\$15.22

- 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 related to lodging, meals and transportation are taxed.
- Based on the average visitor spending on the taxable categories, the 2022 spring/summer advertising generated \$44.6 million in taxes. Given media spending, the 2022 spring/summer ads returned \$15.22 in tax revenue for each \$1 invested.

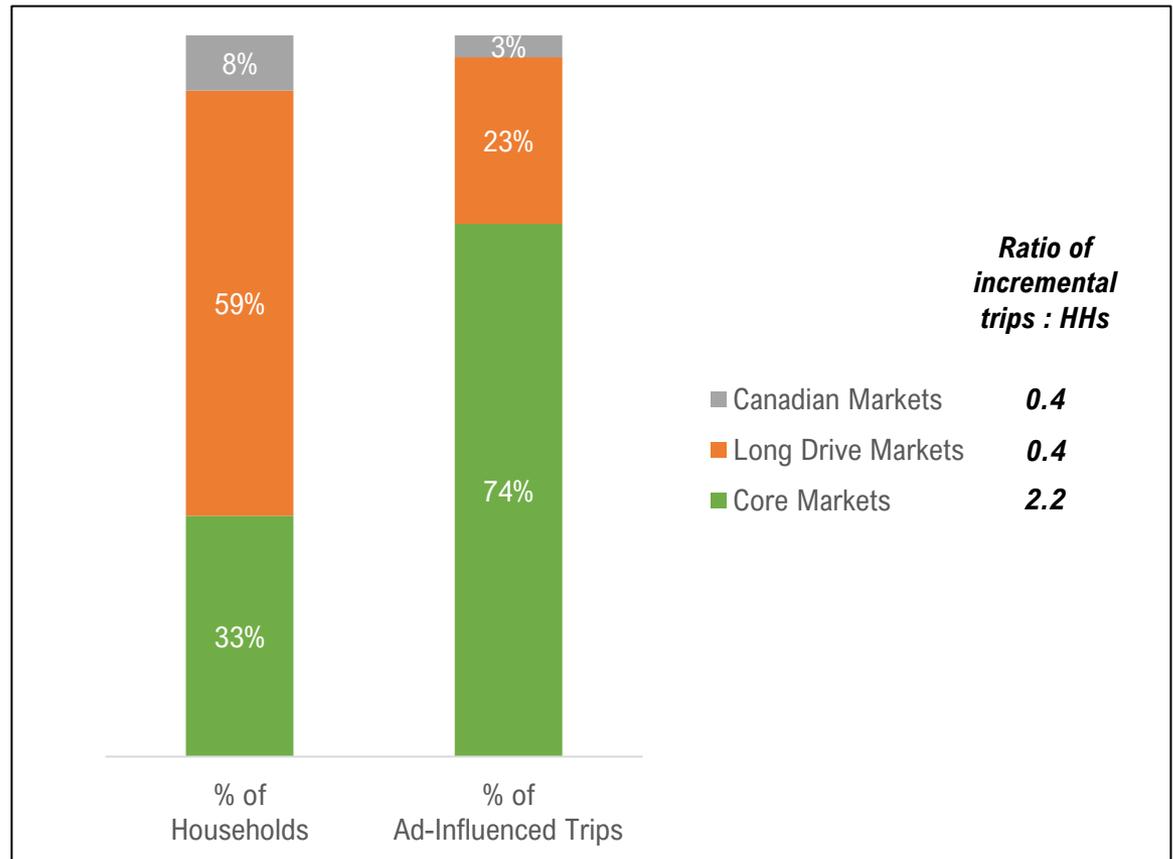
ROI Tracking

	Spring/Summer 2018	Spring/Summer 2019	Summer 2020	Spring/Summer 2021	Spring/Summer 2022
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051
Ad Awareness	43%	44%	43%	41%	46%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666
Incremental Travel	6.5%	4.4%	3.1%	4.2%	4.6%
Incremental Trips	399,487	317,107	160,763	438,804	594,332
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042	\$1,053	\$1,202	\$1,312
Ad-Influenced Trip Spending	\$321,101,120	\$330,339,600	\$169,243,990	\$527,237,760	\$779,563,175
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926,517
ROI	\$179	\$182	\$199	\$222	\$266
Avg. Taxable Trip Spending (among ad-aware visitors)	\$598	\$680	\$603	\$778	\$882
Ad-Influenced Taxable Trip Spending	\$238,957,240	\$215,567,826	\$97,014,255	\$341,556,238	\$524,184,858
Taxes Generated	\$21,506,152	\$19,401,104	\$8,731,283	\$30,740,062	\$44,555,713
Tax ROI	\$11.99	\$10.68	\$10.28	\$12.96	\$15.22

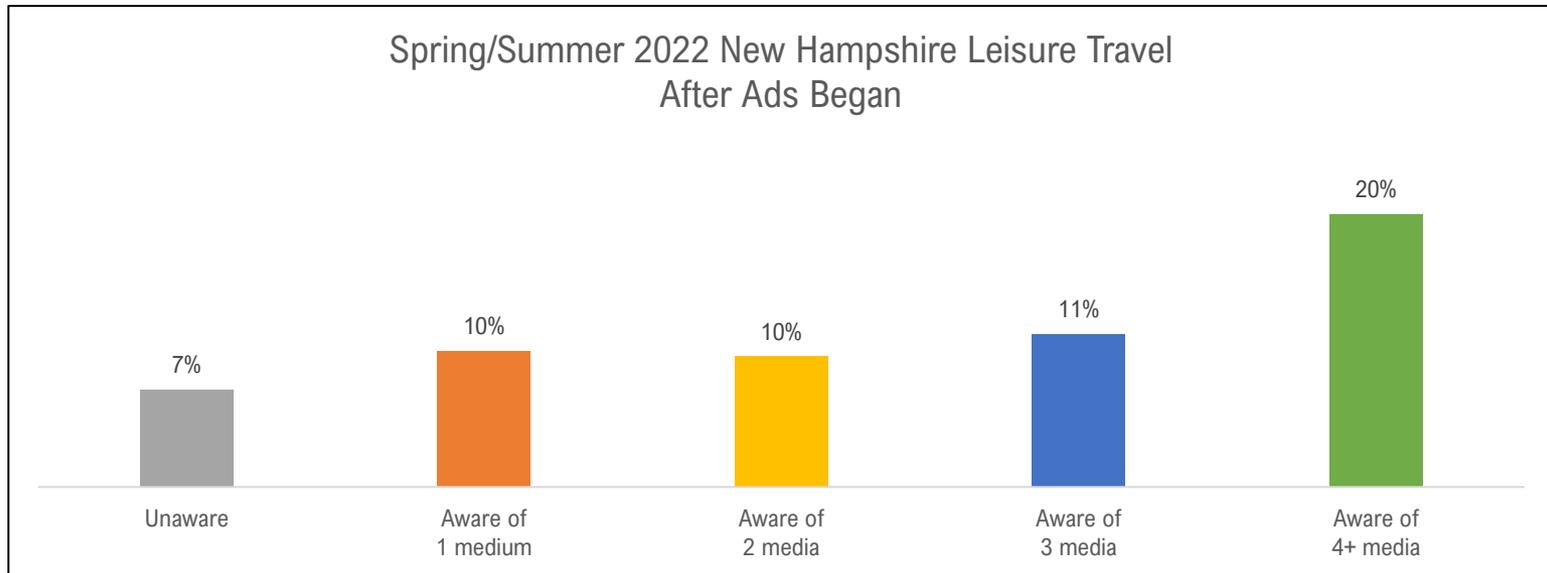
- The spring/summer 2022 advertising produced the highest ROI of the past five spring/summer campaigns.

Market Performance

- Comparing each market group's percentage of the population to percentage of ad-influenced trips results in a "performance ratio."
- While the long drive markets generated the highest ROI, the result is softened a bit when considering this ratio. These markets account for 59% of target households, but just 23% of ad-influenced trips.
- This is not to diminish the advertising effectiveness in the long drive markets. Rather, it is meant to be another lens through which to interpret the results. All three market groups are generating New Hampshire travel and positive ROI.



Media Overlap Impact



- Exposing consumers to advertising in multiple media was critical to influencing New Hampshire travel.
- There is incremental travel among those aware of one, two, or three media, but the ad influence is notably stronger among those who recall seeing ads in four or more media.

Total Fiscal Year ROI

Total FY2021/2022 ROI

	Fall 2021	Winter 2021/2022	Spring/ Summer 2022	Total FY 2021/2022
Influenced Trips	69,476	79,919	594,332	743,727
Avg. Trip Spending (among ad-aware visitors)	\$977	\$1,385	\$1,312	\$1,288
Influenced Trip Spending	\$67,887,580	\$110,710,604	\$779,563,175	\$958,161,359
Avg. Taxable Trip Spending (among ad-aware visitors)	\$675	\$956	\$882	\$871
Influenced Taxable Trip Spending	\$46,911,234	\$76,376,140	\$524,184,858	\$647,472,232
Taxes Generated	\$3,987,455	\$6,491,972	\$44,555,713	\$55,035,140
Media Spending	\$159,485	\$364,471	\$2,926,517	\$3,450,473
ROI	\$426	\$304	\$266	\$278
Tax ROI	\$25.00	\$17.81	\$15.22	\$15.95

- Accounting for all FY2021/22 campaigns, the advertising influenced \$958 million in visitor spending, \$55 million in tax revenue, and visitor spending and tax ROIs of \$278 and \$15.95, respectively.

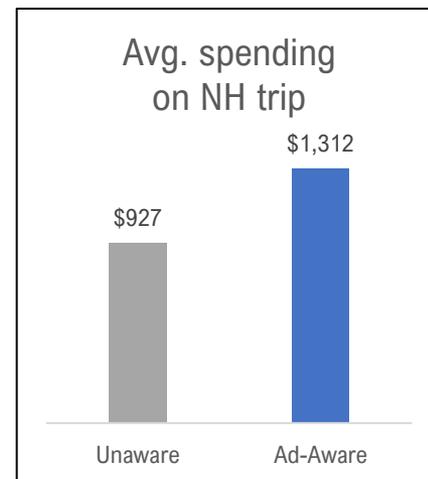
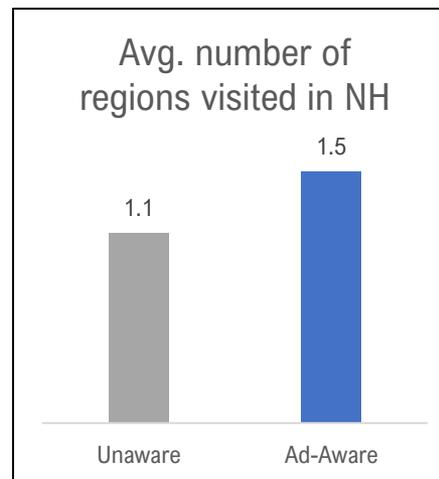
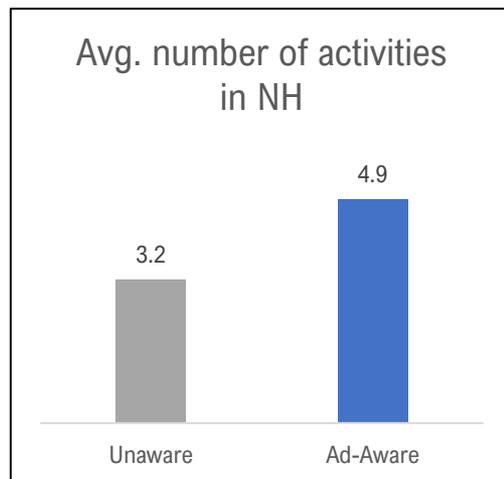
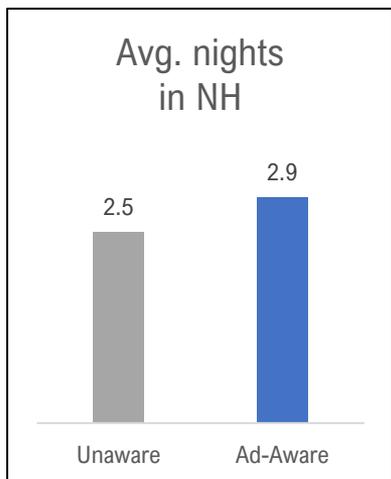
Total FY ROI Comparison

	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
Influenced Trips	604,055	636,170	555,681	529,505	743,727
Avg. Trip Spending (among ad-aware visitors)	\$839	\$900	\$1,103	\$1,101	\$1,288
Influenced Trip Spending	\$506,679,581	\$572,280,741	\$613,102,160	\$583,077,833	\$958,161,359
Avg. Taxable Trip Spending (among ad-aware visitors)	\$586	\$583	\$736	\$751	\$871
Influenced Taxable Trip Spending	\$353,937,438	\$370,684,548	\$408,746,075	\$397,603,983	\$647,472,232
Taxes Generated	\$31,854,370	\$33,361,609	\$36,787,146	\$35,784,358	\$55,035,140
Media Spending	\$2,481,988	\$2,567,179	\$1,545,410	\$2,962,296	\$3,450,473
ROI	\$204	\$223	\$397	\$197	\$278
Tax ROI	\$12.83	\$13.00	\$23.80	\$12.08	\$15.95

- The total fiscal year 2021/2022 ROI and tax ROI are the second highest of the past five fiscal years. Only fiscal year 2019/2020 produced a stronger ROI – when DTTD reduced the media investment in response to the pandemic and New Hampshire travel remained strong because of the state’s outdoor product.

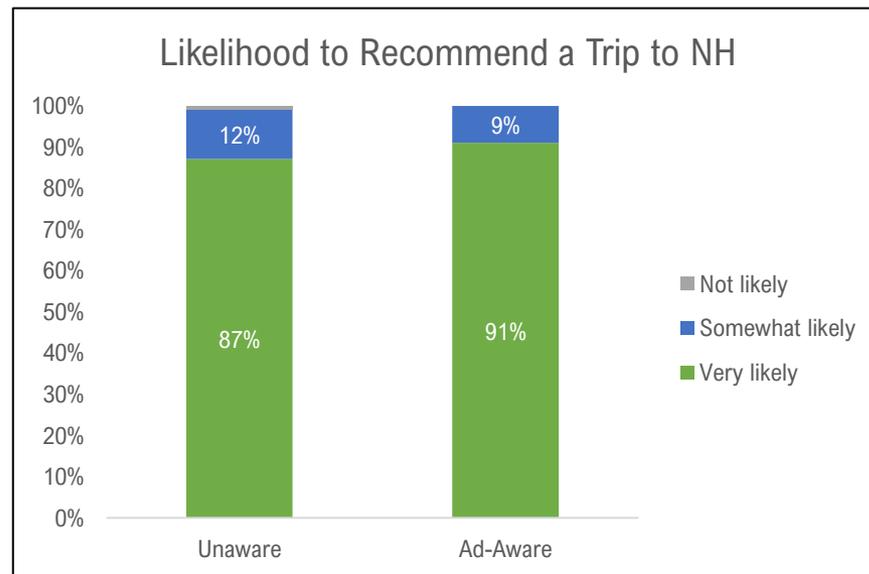
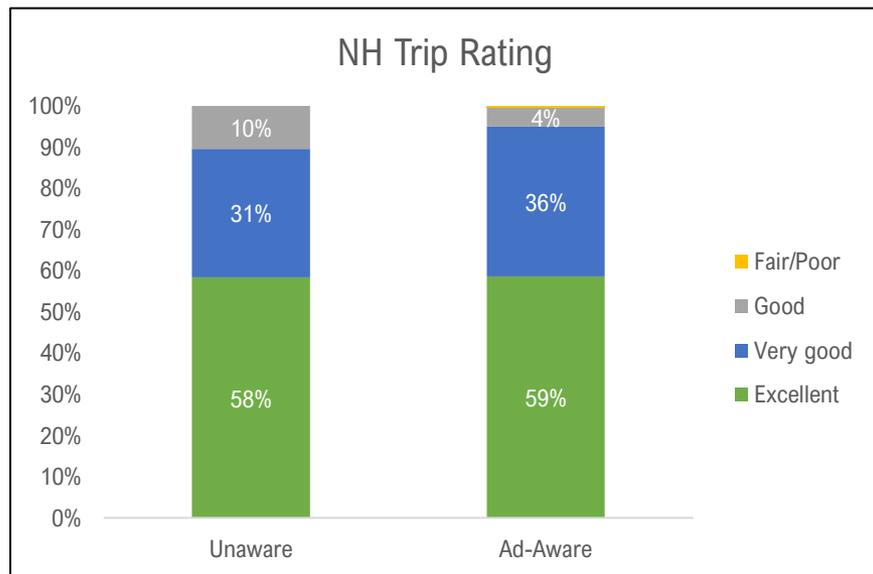
Ad Impact On the New Hampshire Trip

Ad Impact on the NH Trip



- Effective advertising not only influences the decision to visit, but it also showcases the state's leisure travel offerings, which gives visitors ideas and leads to longer, more active trips with higher spending.
- The spring/summer 2022 advertising was effective in this regard, as the ad-aware visitors stayed longer, did more, visited more regions, and spent more than the unaware visitors.

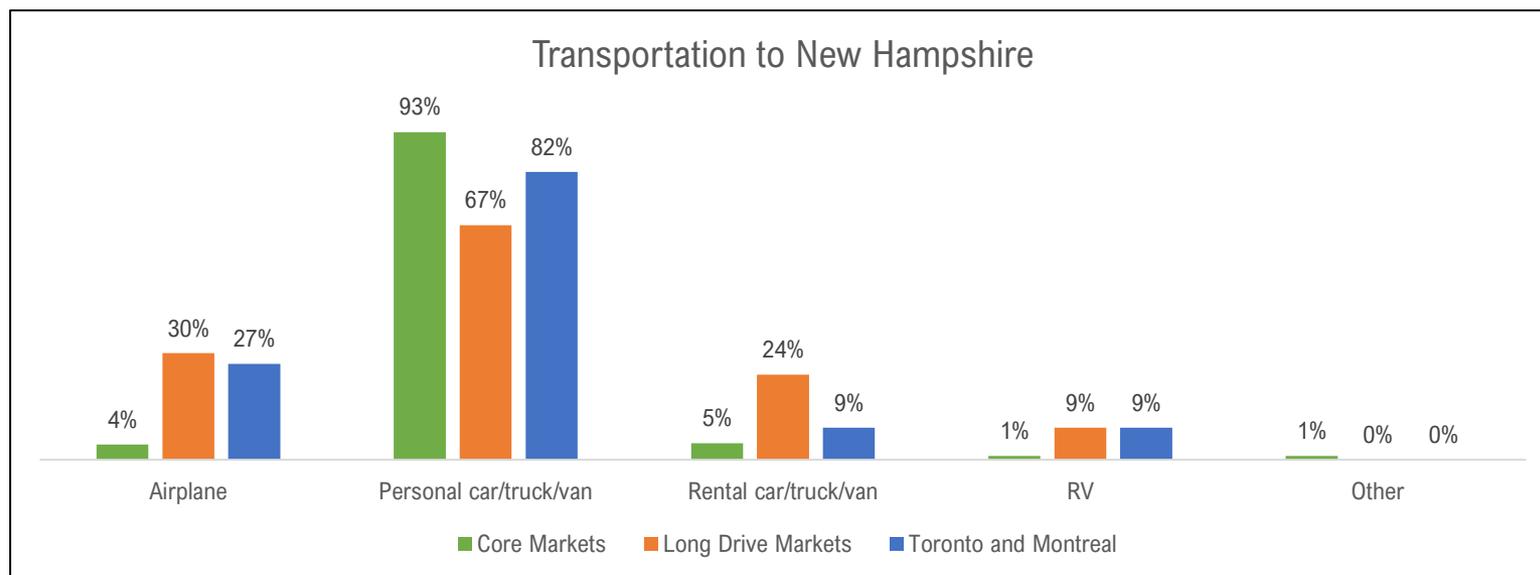
Ad Impact on the NH Trip



- The advertising also has a marginal impact on trip rating and likelihood to recommend the state, but overall satisfaction and advocacy are so strong that there is little opportunity for positive influence.

Appendix: Transportation to NH

Transportation to NH



- A survey question was added to address mode of transportation to New Hampshire.
- Most New Hampshire trips from the nearby core, long drive, and Canadian markets involve an automobile.
- Those from the long drive and Canadian markets are naturally more likely than those from the core markets to fly to the state.

Appendix: Questionnaire

Questionnaire

New Hampshire Tourism
2022 Spring/Summer Ad Effectiveness Wave 2
September 2022

SCREENER MODULE

S1. What is your postal/ZIP code? _____

S3. 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

S2. Please indicate if each of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
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 Hulu or Netflix		
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
- Twitter
- Facebook
- Travel review sites such as TripAdvisor
- TikTok
- Other, please specify _____
- None of these

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 2022? How many trips did you take to or within each state in 2022?

[ROTATE]	States visited in 2022	Number of visits in 2022
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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

Questionnaire

T2. When in 2022 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
- Rental car/truck/van
- RV
- 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	

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. Which of these activities were a major influence when you decided to travel to or within New Hampshire? 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	
Arts, entertainment, and recreation	

Questionnaire

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 or 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	
---	--

AD AWARENESS MODULE

ROTATE APPEARANCE OF MEDIA. SKIP TO NEXT MEDIUM IF AWARE OF ANY AD IN CURRENT MEDIUM.

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

DIGITAL:

ASK IF DE NC PA VA NJ MD OH

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Display Ads\Long-Drive Audience_DE_NC_PA_VA_NJ_MD_OH

	
VisitSummerFY22_Long Trip_160x600	Distance Initial Road Trip
VisitSummerFY22_Long Trip_160x600	Distance Road Trip Itinerary_300x600

ASK IF MA RI CT ME NH NY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Display Ads\Core Audience_MA_RI_CT_ME_NH_NY

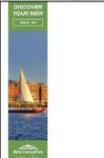
	
VisitSummerFY22_Core Boost General_300x600	Initial
VisitSummerFY22_Core Boost General_300x600	VisitSummerFY22_Core Boost Road Trip_728x90

Questionnaire

ASK If Montreal or Toronto

English

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Display Ads\Canada_Montreal_Toronto_Quebec Province

	
VisitSummerFY22_Canada Initial Road Trip_160x600	VisitSummerFY22_Canada Road Trip Itinerary_300x250

ASK IF Montreal
FRENCH

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Display Ads\Canada_Montreal_Toronto_Quebec Province\Canada_Montreal_Toronto_Quebec Province

	
VisitSummerFY22_Canada French Road Trip Itinerary_300x250	VisitSummerFY22_Canada French_160x600

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

7

TV:

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\TV_Pre-roll Videos

		
NH TOURISM SUMMER 30_horizo...	NH TOURISM 15 - ATTRACTIONS	NH TOURISM 15 - MOUNTAINS (SR)
NH TOURISM SUMMER 30_horizontal.mp4 https://vimeo.com/722686247	NH TOURISM 15 - ATTRACTIONS.mp4 https://vimeo.com/722684078	NH TOURISM 15 - MOUNTAINS (SR).mp4 https://vimeo.com/722684110

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

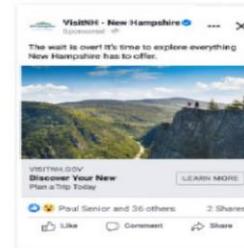
- Yes
- No

SOCIAL ADS:

ASK IF S5 > 0

MONTREAL AND TORONTO ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Social Ads\Canada Audience_Montreal_Toronto_Quebec Province



Epic Adventure_French



Laid Back Summer

8

Questionnaire

ALL U.S. MARKETS

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY

3_Summer Core Social_FB Video_Sea to Sky 30.mp4			
https://vimeo.com/722936158			

MA RI CT ME NH NY ONLY



DE NC PA VA NJ MD OH ONLY



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

ONLY SHOW IF LISTEN TO PANDORA AT S2
 PANDORA IS FOR U.S. MARKETS ONLY

RADIO:
 I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Streaming Radio\Sponsored Station Radio Spots



85780_S1_V2_JPerry.mp4	https://vimeo.com/722954069	23sec
85780_S2_V2-2_JPerry.mp4	https://vimeo.com/722954098	30sec
85780_S3_V2-2_JPerry.mp4	https://vimeo.com/722954137	26sec

ASK FOR EACH RADIO AD
 Have you heard this or a similar ad before now?
 Yes
 No

OOH:

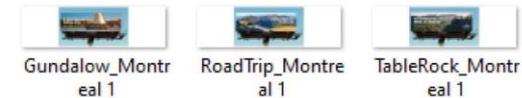
NY ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Billboards\NYC



MONTREAL ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Billboards\Canada\Montreal\USE



Questionnaire

TORONTO ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Billboards\Canada\Toronto\USE



Gundalow_Toronto 1



Night Camping_Toronto 1



Table_Rock_Toronto 1

NH ONLY



MA ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Billboards\MA, CT, RI\Back Bay Station Takeover_MA



Back Bay Station, Video, MA



Back Bay, DCH, Banner



Back Bay, DCH, Banner2



Back Bay, DCH, Platform poster



Back Bay, DCH, Turnstile



Back Bay, DCH, Wall posters



Lake, MA, CT, RI 1



Night Camping



Table Rock

CT, RI ONLY

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Billboards\CT, RI



Lake_MA CT RI 1



Night Camping



Table Rock

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

- Yes
- No

NY, NH, MA, RI, ME ONLY

PRINT:

I:\Ads Master\New Hampshire\2022\SpringSummer\Summer 2022 Assets for SMARI Survey\Print Ad_New England



DTTD Summer Strip Ad, Camping



DTTD Summer Strip Ad, Lake



DTTD Summer Strip Ad, Throwback



Spread Ad, Table Rock

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

- Yes
- No

COVID-19 MODULE

The following questions are about your thoughts and behaviors given the coronavirus/COVID-19 pandemic.

C1. Which of the following best describes how you feel about traveling soon?

I would not even consider traveling any time soon	
I will wait and see what happens in the coming weeks before planning any trips	
I am ready to start planning a trip now	
I already have plans to travel	

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

Questionnaire

- D2. Including you, how many people live in your household? _____ [IF 1, SKIP TO D4]
- D3. How many children under the age of 18 live in your household? _____
- 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