



New Hampshire

LIVE FREE

2022 Fall Advertising
Effectiveness Research

December 2022



insights

Strategic Marketing and Research

Background & Objectives

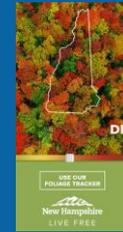
- The New Hampshire Division of Travel and Tourism Development (the Division) ran fall advertising in 2022 in core, long drive, and Canadian markets.
- The Division has partnered with Strategic Marketing & Research Insights (SMARInsights) to assess the effectiveness of the fall 2022 advertising.
- The objectives of this seasonal advertising effectiveness research include the following:
 - Measure awareness of the fall 2022 advertising among the target audience;
 - Evaluate the efficiency of the Division's media buy through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
 - Assess the ability of the advertising to influence New Hampshire fall travel;
 - Quantify ad-influenced fall trips, visitor spending, and ROI;
 - Review the results by market group; and
 - Forward insights into future refinement of the marketing.

Methodology

- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising, providing a representative measure of aided ad awareness.
- National sample vendors with demographically representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents had to be travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- The fall 2022 advertising was aimed at core, long drive, and Canadian markets. Ad spending by market is provided on the following page.
- A total of 1,701 surveys were completed in November 2022. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the fall research results.

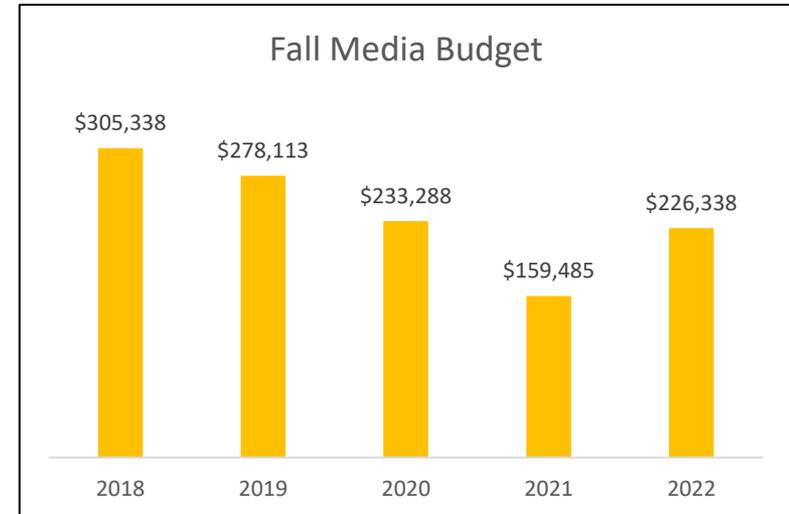
Market Group	Market	Completed Surveys
Core Markets	New Hampshire	101
	Connecticut	101
	Massachusetts	152
	Rhode Island	91
	Maine	100
	New York	202
Long Drive Markets	New Jersey	153
	Pennsylvania	200
	Delaware	100
	Maryland	100
	Virginia	100
Canadian Markets	Montreal	151
	Toronto	150
	Total	1,701

Fall Campaign Overview



Market	TV	Digital Display	Social	Total
New Hampshire	\$0	\$7,333	\$4,236	\$11,569
Connecticut	\$12,538	\$9,333	\$7,154	\$29,025
Massachusetts	\$0	\$7,333	\$4,236	\$11,569
Rhode Island	\$12,538	\$9,333	\$7,154	\$29,025
Maine	\$0	\$7,333	\$4,236	\$11,569
New York	\$0	\$9,333	\$7,154	\$16,487
New Jersey	\$5,000	\$8,000	\$4,433	\$17,433
Pennsylvania	\$5,000	\$8,000	\$4,433	\$17,433
Delaware	\$5,000	\$8,000	\$4,433	\$17,433
Maryland	\$5,000	\$8,000	\$4,433	\$17,433
Virginia	\$5,000	\$8,000	\$4,433	\$17,433
Montreal	\$0	\$10,000	\$4,963	\$14,963
Toronto	\$0	\$10,000	\$4,963	\$14,963
Total	\$50,075	\$110,000	\$66,263	\$226,338

Total Core = \$109,246 / Total Long Drive = \$87,167 / Total Canadian = \$29,926



- The fall 2022 campaign included TV, digital display, and social media advertising.
- The media investment was \$226,338, which is larger than the 2021 fall investment and on par with 2020.
- The ads invite viewers to “Discover Your New” and feature New Hampshire’s outdoor, small-town, road trip, and family-friendly activities and attractions. “Discover Your New” advertising launched in summer 2020, so the campaign has been wearing in for more than two years now.
- The entire collection of ads tested can be found in the questionnaire in the Appendix.

Insights: Ad Awareness and Ratings

In fall of 2022, the Division ran Discover Your New advertising in core, long drive, and Canadian markets. The advertising once again proved effective. Key insights from this research include:

- The advertising generated 37% awareness, reaching about 8.0 million households. Ad awareness increased from 34% in fall 2021, driven by a larger media investment and ad wear in.
- The level of awareness is excellent given a relatively small budget, but there is likely some residual awareness of prior fall and other seasonal Discover Your New advertising driving this strong result.
- The cost per ad-aware household is \$0.03, which is on par with previous New Hampshire fall campaigns – and indicates a remarkably efficient media investment compared to SMARInsights' benchmark of \$0.51 for campaigns of similar scope.
- The reaction to the fall 2022 advertising is mostly positive, especially in the core and long drive markets. Canadians are less positive.
- Some ad ratings declined year-over-year, which could be an early indication of the “Discover Your New” campaign wearing out. A similar result was observed in the spring/summer 2022 research. The greatest YOY declines are seen for *uncover new places or things*, *want to learn more*, and *want to visit*.

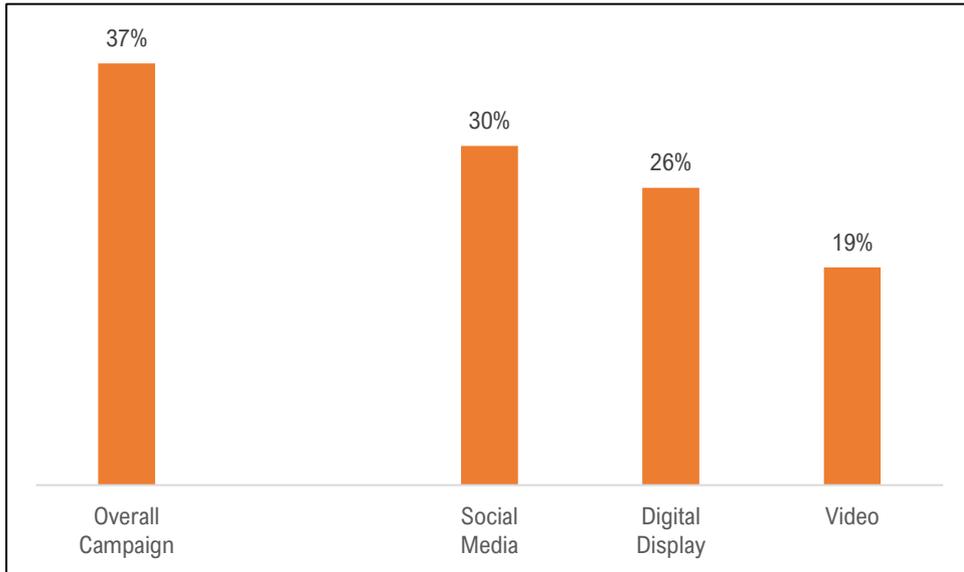
Insights: Ad Impact and ROI

- The fall 2022 advertising had a positive impact on top-of-mind consideration, familiarity with the New Hampshire leisure travel product, and preference for the state.
- The advertising ultimately influenced New Hampshire leisure travel during fall 2022 from all market groups. The greatest impact was achieved in the core markets. While long-haul leisure travel is returning as we emerge from the pandemic, the fall advertising was still most effective in the nearby markets – which makes sense given that fall trips tend to be shorter and closer to home.
- The overall level of fall incremental travel increased from 0.8% in 2021 to 1.3% in 2022. While the ads might be showing signs of wear out from an evaluative standpoint, they are not yet weakening in terms of their ability to influence New Hampshire leisure travel.
- Overall, the fall 2022 advertising influenced about 106,000 New Hampshire leisure trips. About 80% of these ad-influenced trips came from the core target markets.
- Incremental trips increased by 52% over fall 2021 but are not back to pre-pandemic levels when the fall 2019 ads influenced more than 200,000 trips.
- With an average trip spending of \$1,181, the fall 2022 advertising influenced about \$125 million in revenue. This means an ROI of \$551 for each \$1 invested in the media buy.
- The fall 2022 advertising produced more visitor spending and a higher ROI than the fall 2020 and 2021 advertising but falls short of the pre-pandemic (2019) ROI of \$664.
- A continued return to normalcy is reflected in an increase in average visitor spending that outpaces inflation.



Ad Awareness

Fall 2022 Ad Awareness Overall and by Medium

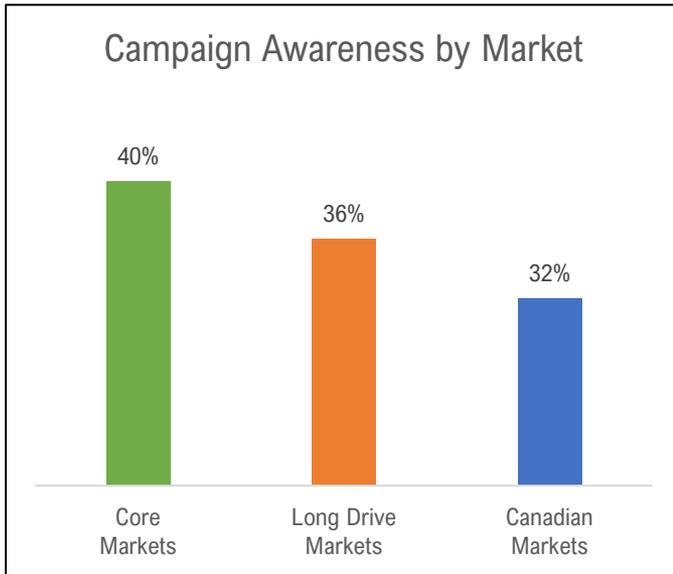


Target HHs	21,562,811
Ad Awareness	37%
Ad-Aware HHs	8,049,391
Media Investment	\$226,338
Cost per Aware HH	\$0.03



- The fall 2022 Discover Your New advertising generated 37% awareness, reaching 8.0 million households.
- With an investment of \$226,338, the Division spent \$0.03 to reach a target household. This indicates another remarkably efficient media buy, but some awareness is likely attributable to prior Discover Your New advertising, which has been airing since summer 2020 and has received a total media investment of more than \$4 million.

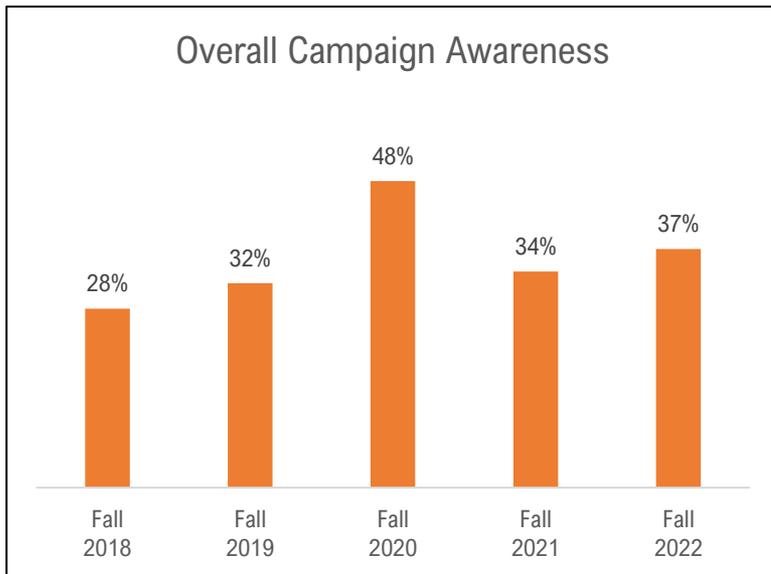
Fall 2022 Ad Awareness by Market Group



	Core Markets	Long Drive Markets	Canadian Markets
Target HHs	9,286,327	10,150,867	2,125,618
Ad Awareness	40%	36%	32%
Ad-Aware HHs	3,700,811	3,663,928	684,652
Media Investment	\$109,246	\$87,167	\$29,926
Cost per Aware HH	\$0.03	\$0.02	\$0.04

- Ad awareness is highest in the core target markets.
- But the long drive markets are more populous and account for nearly as many ad-aware households.
- The cost per aware household figures indicate efficient media investments in all markets.

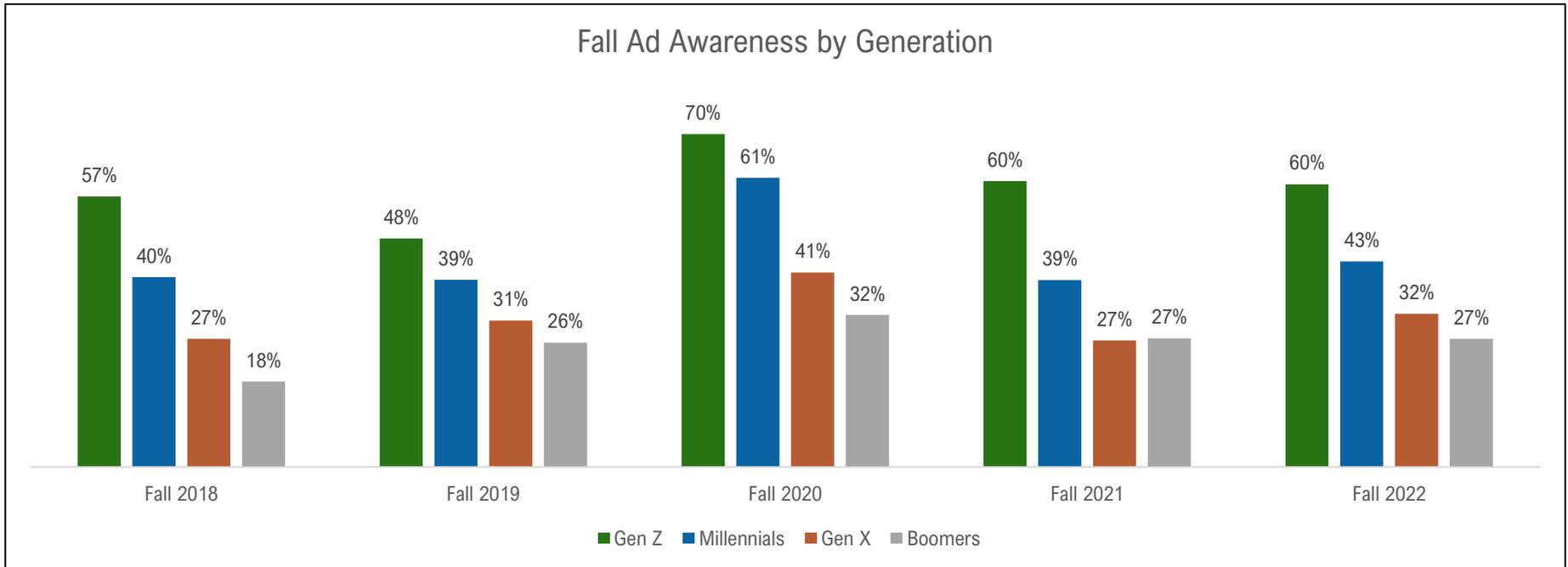
Fall Ad Awareness Compared to Recent Years



	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022
Target HHs	18,270,009	19,205,673	9,612,930	25,578,115	21,562,811
Ad Awareness	28%	32%	48%	34%	37%
Ad-Aware HHs	5,185,047	6,150,380	4,641,103	8,656,969	8,049,391
Media Investment	\$305,338	\$278,113	\$233,288	\$159,485	\$226,338
Cost per Aware HH	\$0.06	\$0.05	\$0.05	\$0.02	\$0.03

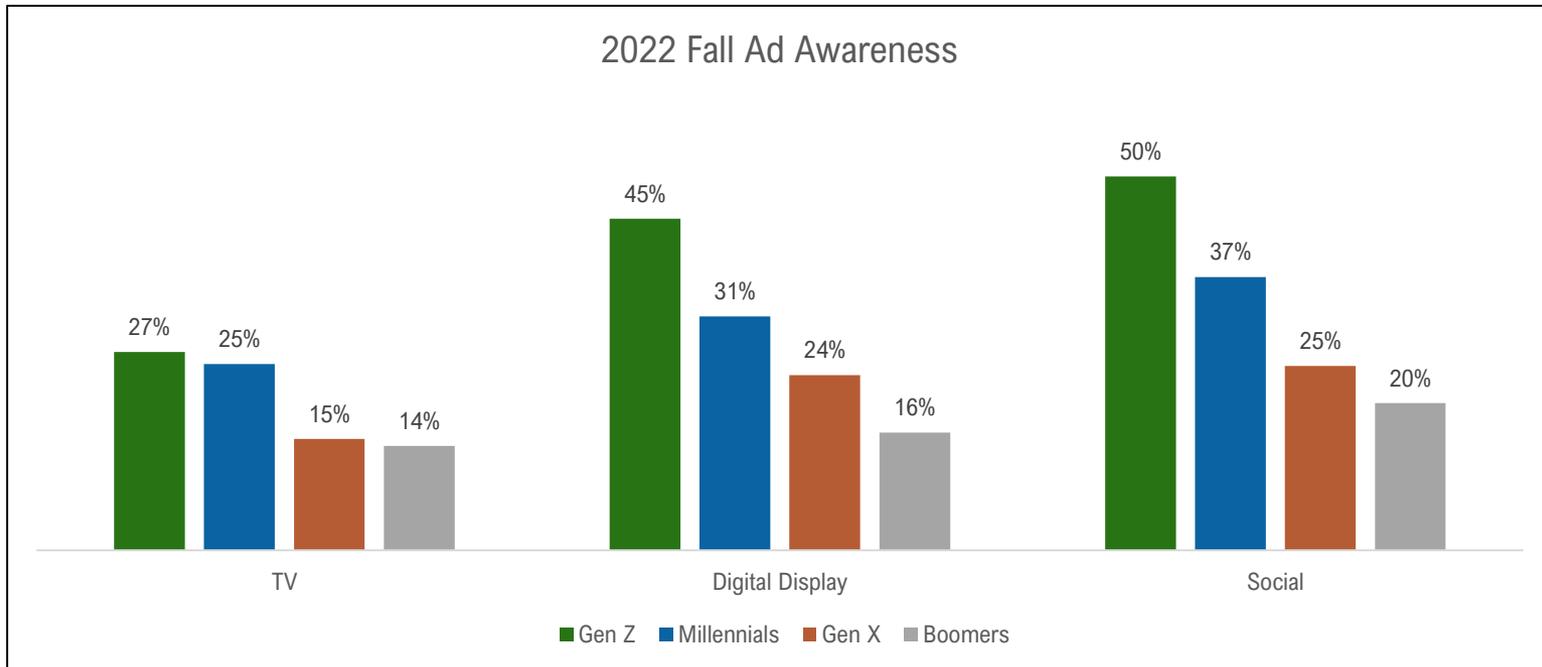
- The level ad awareness achieved in fall 2022 is the second-highest of the past five fall campaigns.
- The target household base is smaller in 2022 than in 2021 due to removing North Carolina and Ohio as target markets.
- The additional media investment in 2022 led to a three-percentage point gain in ad awareness. The cost per ad-aware household increased by only \$0.01, indicating efficient use of the additional funding.

Fall Ad Awareness by Generation



- The awareness growth in 2022 was among Millennials (39% to 43%) and Gen Xers (27% to 32%).
- Advertising awareness continues to be higher among younger consumers, aligning with overall industry trends as older consumers become increasingly more difficult to reach.

Fall 2022 Ad Awareness by Generation by Medium



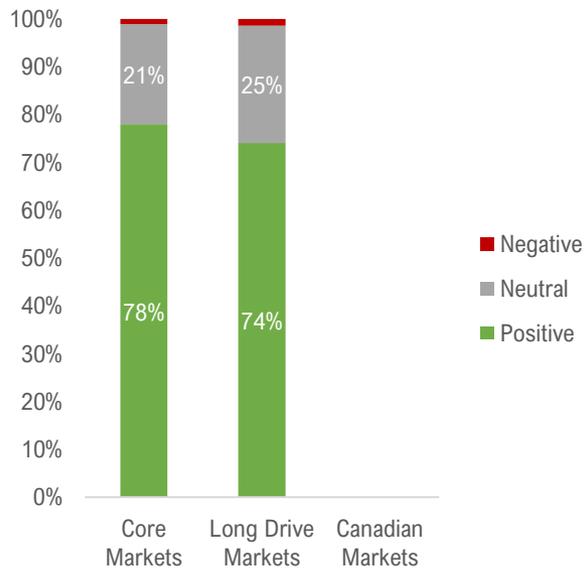
- Awareness of all fall 2022 media is higher among younger consumers – but the difference is more pronounced with digital display and social advertising. That said, TV is the medium with the lowest awareness across generations, highlighting the challenge of reaching older consumers even with a more traditional medium like linear TV.



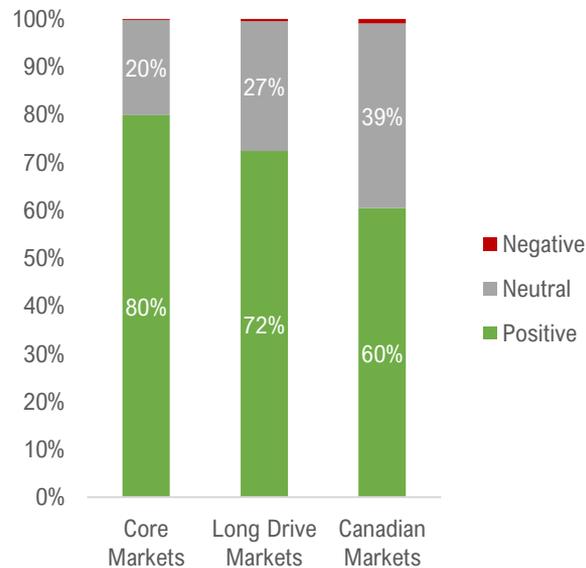
Creative Ratings

Overall Reaction to Fall 2022 Ads

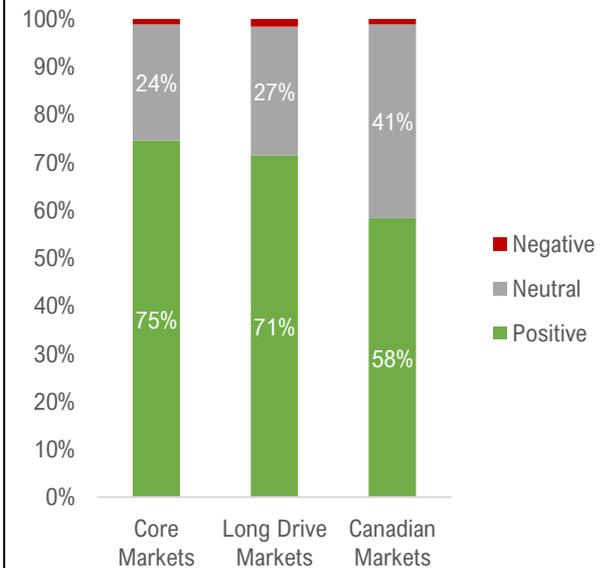
Reaction to Video Ad



Reaction to Digital Display Ads



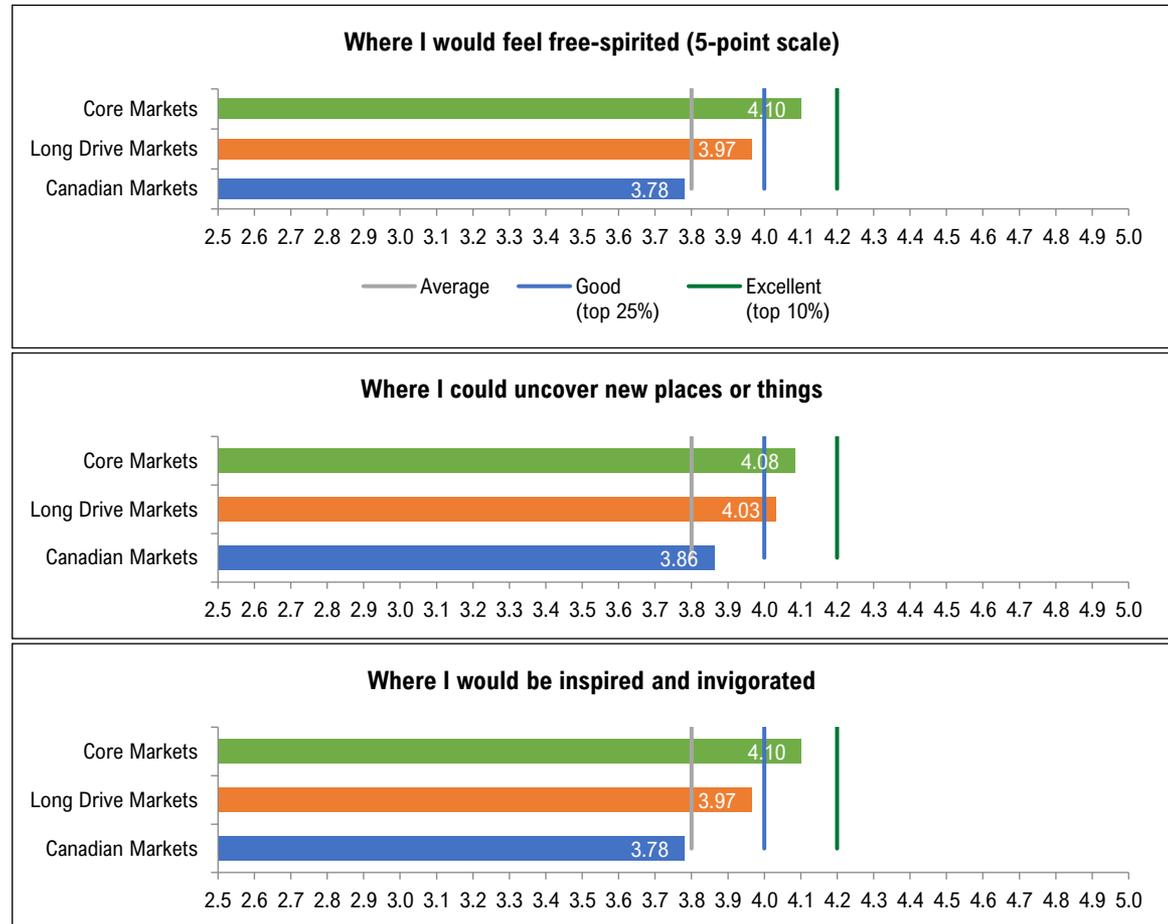
Reaction to Social Media Ads



- The reaction to the fall 2022 advertising is mostly positive, especially in the core and long drive markets. Canadians are less positive.
- There are almost no negative reactions to the ads across markets.

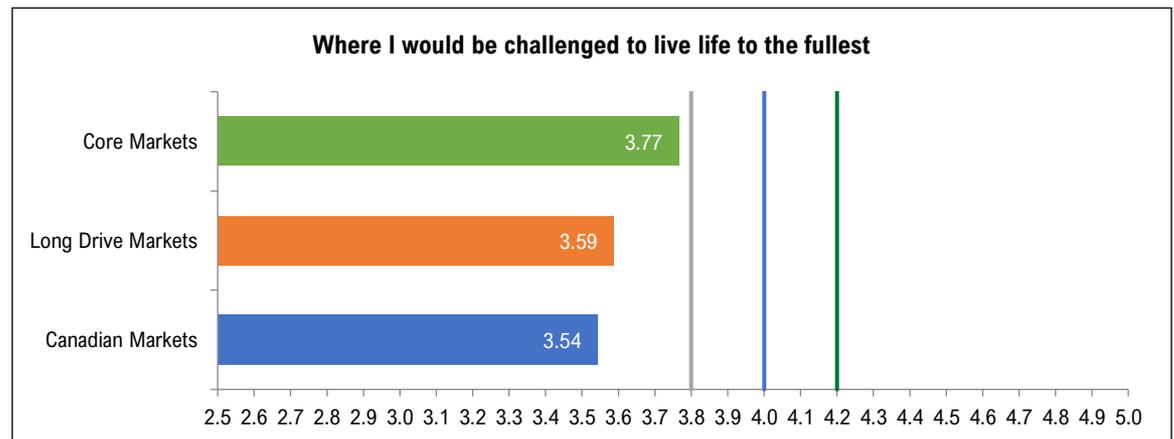
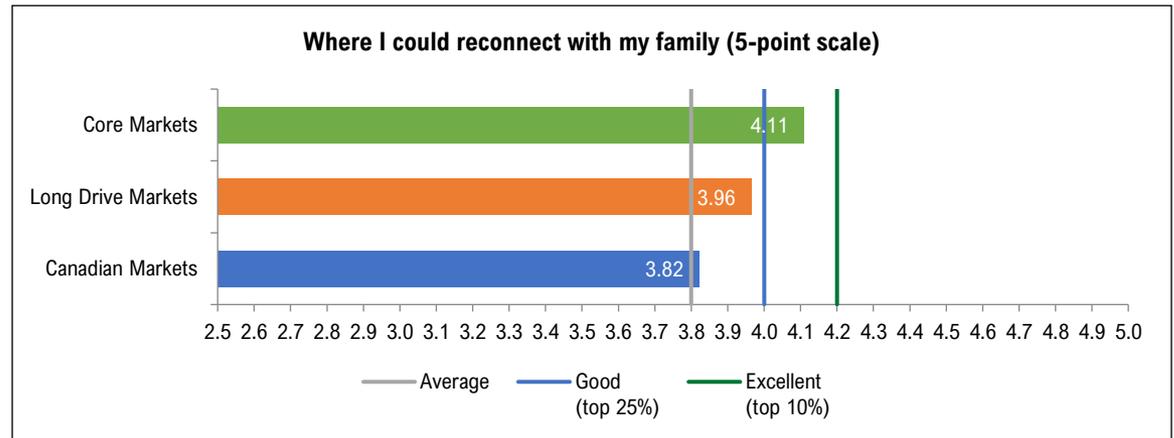
Fall 2022 Communication Attributes

- The fall 2022 advertising achieves top 25% ratings in the core target markets for communicating these messages.
- The ads rate above-average in the long drive markets and about average in the Canadian markets.



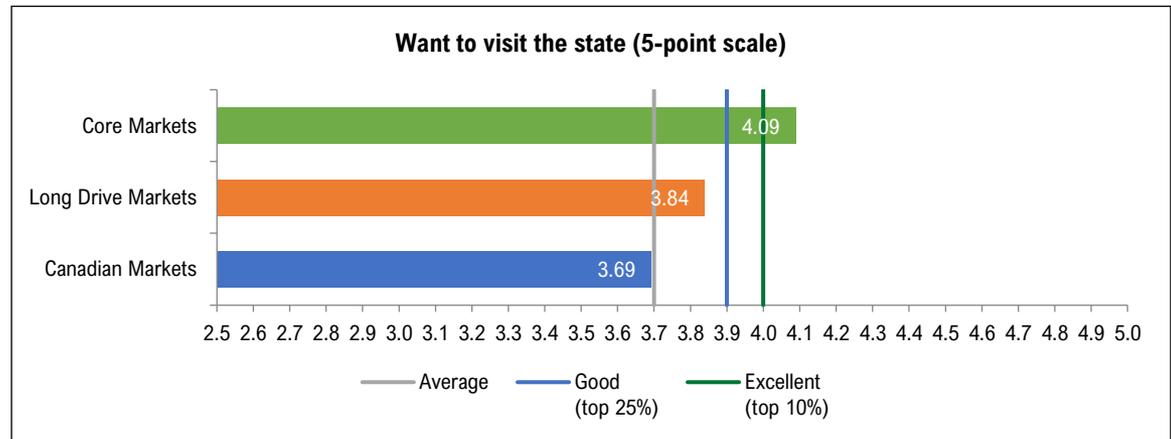
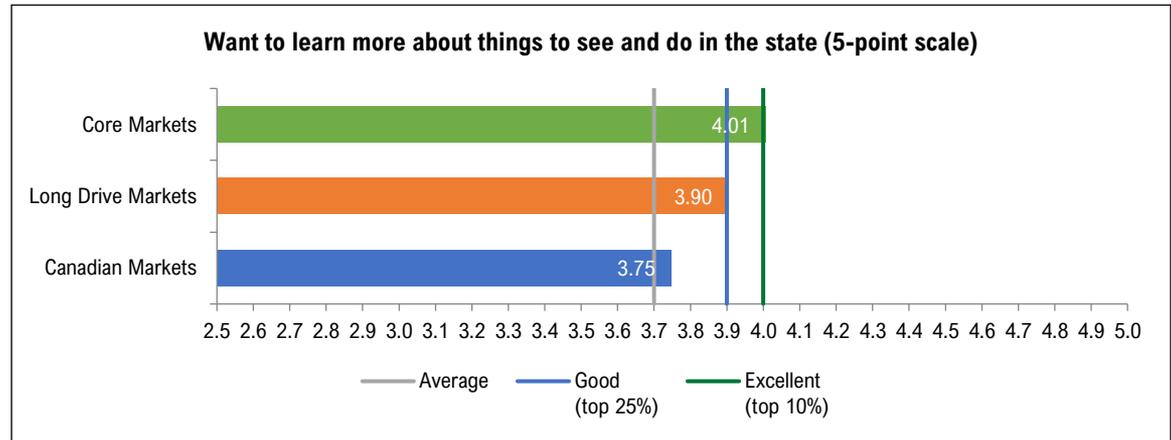
Fall 2022 Communication Attributes cont.

- The ratings for *reconnect with my family* tell a similar story – core market consumers are the most positive about the ads, and Canadians are the least positive.
- Communicating *where I would be challenged to live life to the fullest* is a challenge across markets.



Fall 2022 Impact Attributes

- From an evaluative ratings standpoint, the fall 2022 advertising is excellent at generating interest in New Hampshire travel in the core markets.
- Like the communication ratings, these impact ratings are good in the long drive markets and average in the Canadian markets.
- Actual ad impact on perceptions and intent to travel are reviewed in the next section.



Fall 2022 Ad Ratings by Ad Awareness

Above average across groups
Average across groups
Below average across groups

Communication Ratings	Core Markets		Long Drive Markets		Canadian Markets	
	Unaware	Ad-Aware	Unaware	Ad-Aware	Unaware	Ad-Aware
Where I would be inspired and invigorated	3.94	4.35	3.84	4.19	3.59	4.18
Where I could reconnect with my family	4.02	4.25	3.84	4.18	3.62	4.26
Where I would feel free-spirited	4.05	4.43	4.00	4.35	3.71	4.29
Where I would be challenged to live life to the fullest	3.58	4.05	3.49	3.76	3.30	4.05
Where I could uncover new places or things	3.90	4.36	3.90	4.26	3.68	4.24
Impact Ratings	Core Markets		Long Drive Markets		Canadian Markets	
	Unaware	Ad-Aware	Unaware	Ad-Aware	Unaware	Ad-Aware
Want to learn more about things to see and do in the state	3.80	4.32	3.70	4.26	3.51	4.25
Want to visit the state	3.88	4.40	3.65	4.18	3.40	4.30

- While Canadians overall give the advertising lower ratings than do consumers in the core and long drive markets, this is in part a function of lower ad awareness. The Canadians with prior awareness of the ads give them strong ratings, mostly on par with the ad-aware consumers from the domestic markets.
- Those with prior ad awareness (before taking the survey, in the ads' "natural habitat") almost always give the ads stronger scores than those seeing the ads for the first time in the more contrived survey environment.

Fall Campaign Ratings Change

Top 10% Benchmark Range
Top 25% Benchmark Range
Above Average Benchmark Range
Below Average Benchmark Range

YOY ad ratings data includes the matching markets:

New Hampshire
Connecticut
Massachusetts
Rhode Island
Maine
New York
New Jersey
Pennsylvania
Delaware
Maryland
Virginia

Communication Ratings	Fall 2021	Fall 2022
Where I would be inspired and invigorated	4.07	4.03
Where I could reconnect with my family	3.92	4.03
Where I would feel free-spirited	4.17	4.16
Where I would be challenged to live life to the fullest	3.70	3.67
Where I could uncover new places or things	4.22	4.06

Impact Ratings	Fall 2021	Fall 2022
Want to learn more about things to see and do in the state	4.02	3.95
Want to visit the state	4.02	3.96

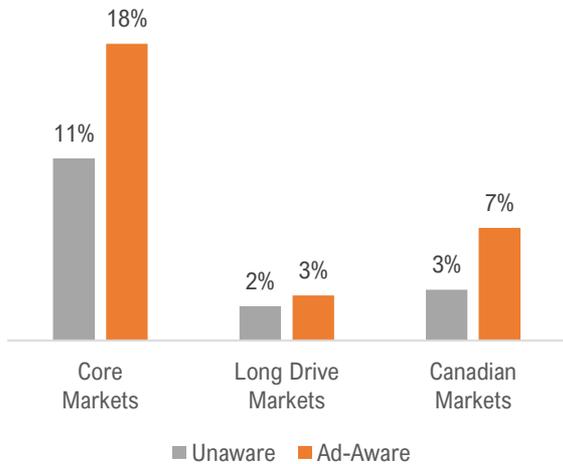
- Some ad ratings declined year-over-year, which could be an early indication of the “Discover Your New” campaign wearing out. A similar result was observed in the spring/summer 2022 research.
- The only notable YOY declines are seen for *uncover new places or things*, *want to learn more*, and *want to visit*.



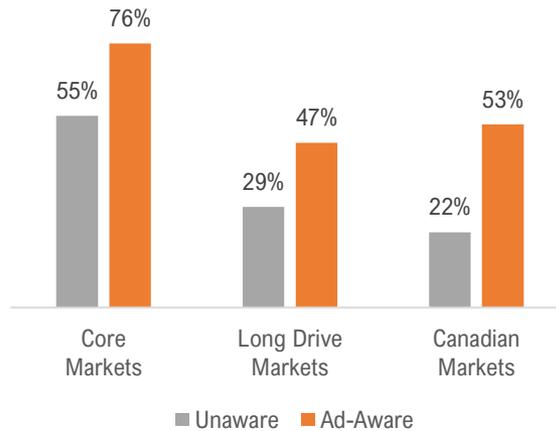
Advertising Impact

Ad Impact On Top of Mind, Familiarity, and Preference

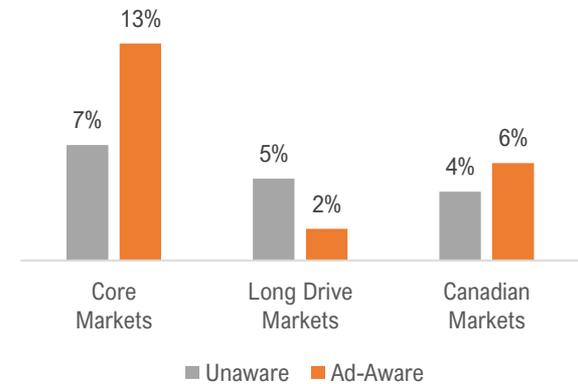
Top-of-Mind Consideration



Familiar with New Hampshire Leisure Travel Product



Picked New Hampshire as Preferred Leisure Travel Destination



- The fall 2022 advertising has a positive impact on top-of-mind consideration, familiarity with the New Hampshire leisure travel product, and preference for the state.
- The only exception is no incremental impact on preference in the long drive markets.

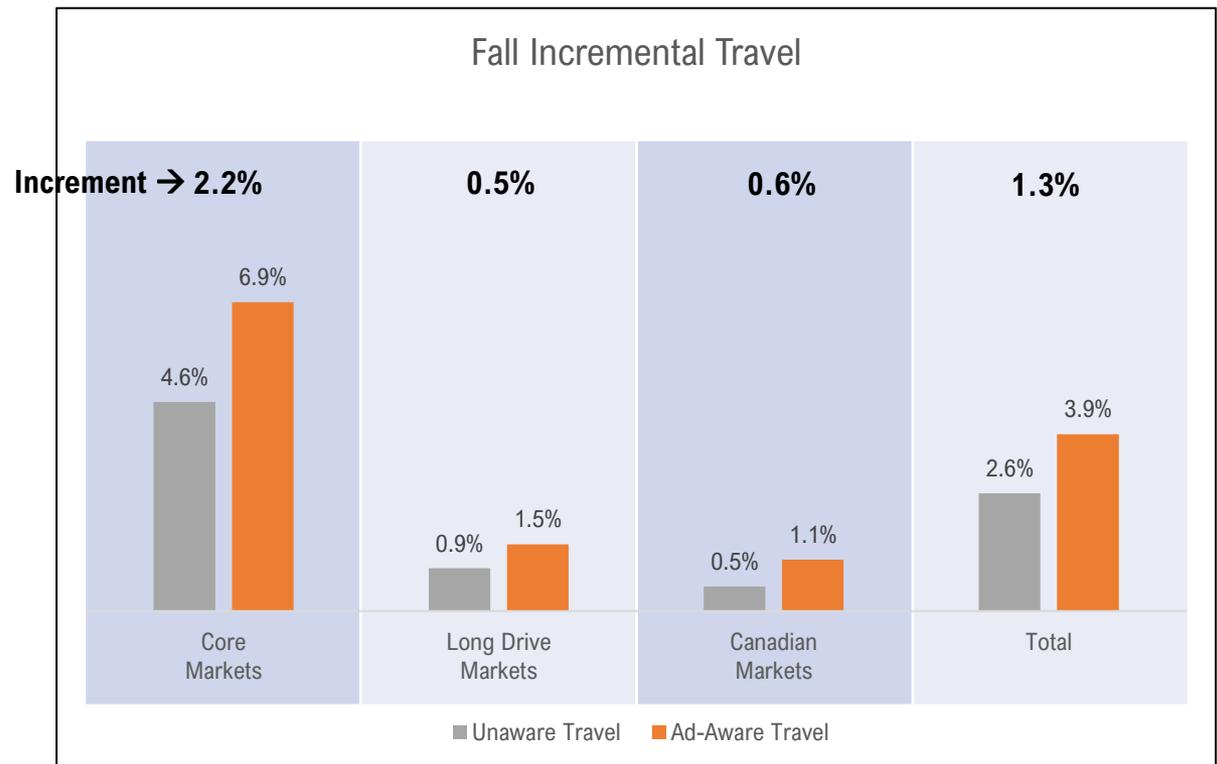
Incremental Travel Review

- SMARInsights' methodology for measuring advertising impact relies on establishing a base rate of travel. Certainly, travel to New Hampshire would occur in the absence of advertising. Thus, not all travel, or even travel by ad-aware households, is attributable to the ads. Rather, the level of travel among unaware consumers is considered the base rate of travel that would occur without any advertising influence. Any travel above that base by ad-aware consumers is what is considered influenced. As such, accounting for only this *incremental travel* is a conservative measure of influence.
- For this fall review we are counting only travel that occurred between October and November 2022 that did not include a stay at the visitor's vacation home or the home of family/friends. The prior spring/summer ROI wave counted travel from March 2022 through September 2022. Accounting for travel in only October and November in this fall wave prevents double-counting.



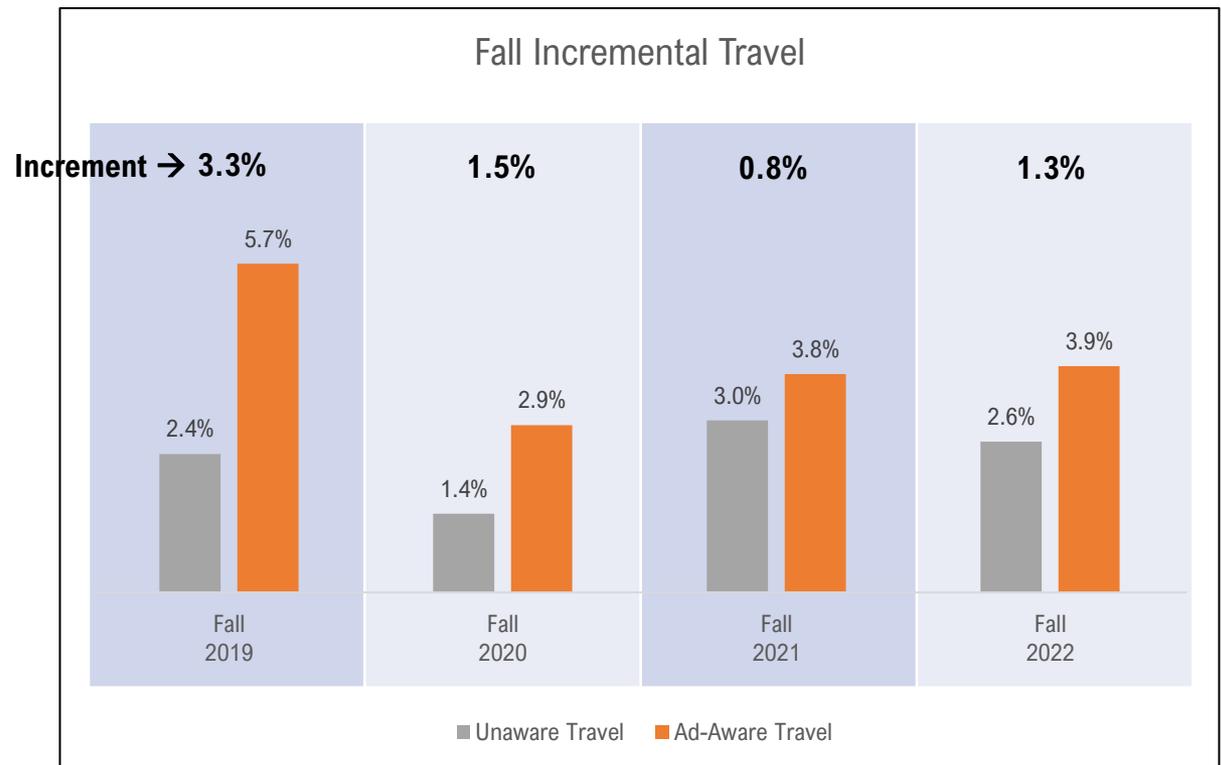
Fall 2022 Incremental Travel

- The fall 2022 advertising influenced New Hampshire leisure travel from all three 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 fall advertising was still most effective in the nearby markets – which makes sense given that fall trips tend to be shorter and closer to home.



Tracking Fall Incremental Travel

- The overall level of fall incremental travel increased from 0.8% in 2021 to 1.3% in 2022.
- Next, we use the level of ad-influenced travel to estimate the quantity of influenced trips and ROI.



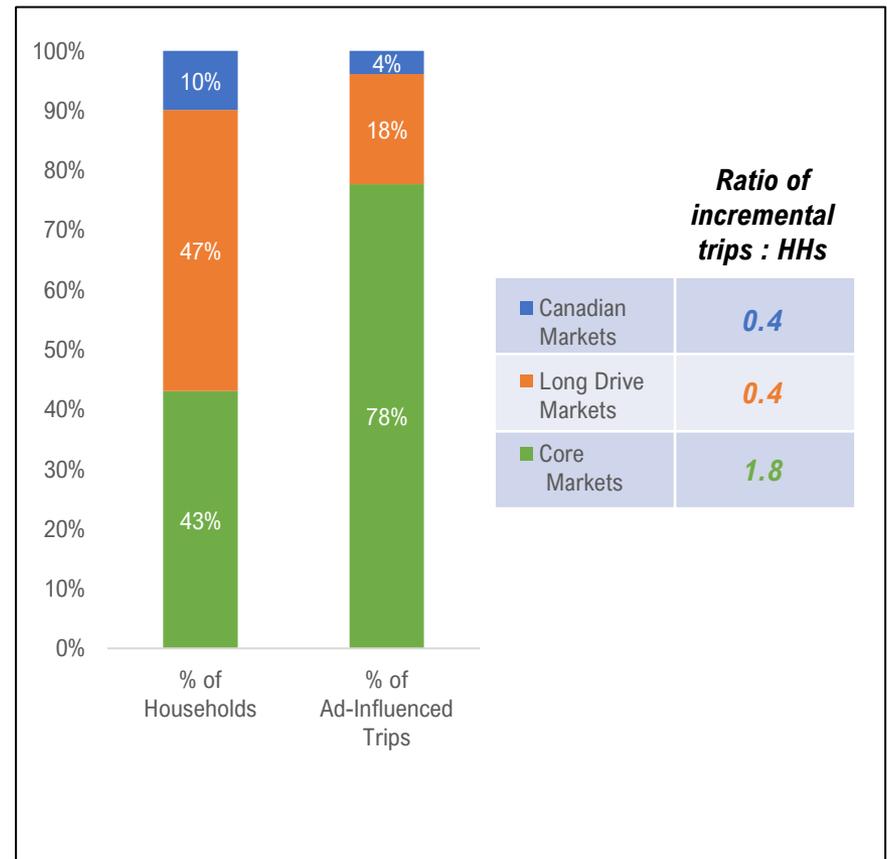
Fall 2022 Ad-Influenced Trips

	Core Markets	Long Drive Markets	Canadian Markets	Total
Target HHs	9,286,327	10,150,867	2,125,618	21,562,811
Ad Awareness	40%	36%	32%	37%
Ad-Aware HHs	3,700,811	3,663,928	684,652	8,049,391
Incremental Travel	2.2%	0.5%	0.6%	1.3%
Incremental Trips	82,081	19,467	4,086	105,635

- Overall, the fall 2022 advertising influenced about 106,000 New Hampshire leisure trips.
- About 80% of these ad-influenced trips came from the core target markets.

Fall 2022 Market Performance

- Comparing each market group's percentage of population to percentage of ad-influenced trips results in a "performance ratio."
- The ads' relatively strong impact in the core is clear when we see that they account for 43% of households and 78% of ad-influenced trips.
- It makes sense that the long drive and Canadian market performance would not be as strong in the fall given the nature of fall trips, which tend to be shorter and closer to home.



Fall Ad-Influenced Trips Tracking

- Incremental trips increased by 52% over fall 2021 but are not back to pre-pandemic levels.
- Strong performance in the core markets and some impact in the long drive and Canadian markets drove this result.

	Fall 2019	Fall 2020	Fall 2021	Fall 2022	% Change
Target HHs	19,205,673	9,612,930	25,578,115	21,562,811	-16%
Ad Awareness	32%	48%	34%	37%	9%
Ad-Aware HHs	6,150,380	4,641,103	8,656,969	8,049,391	-7%
Incremental Travel	3.3%	1.5%	0.8%	1.3%	63%
Incremental Trips	204,124	71,415	69,476	105,635	52%

Fall 2022 Influenced Trip Spending by Market

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	82,081	19,467	4,086	105,635
Avg. Trip Spending (among ad-aware visitors)	\$1,138	\$1,332	\$1,332	\$1,181
Ad-Influenced Trip Spending	\$93,437,878	\$25,926,962	\$5,441,890	\$124,806,730

- With average trip spending of \$1,181, the fall 2022 advertising influenced about \$125 million in revenue.

Fall 2022 ROI

- With \$125 million in ad-influenced visitor spending and a media investment of \$226,000, the ROI is \$551 for each \$1 invested in the media buy.

	Total
Incremental Trips	105,635
Avg. Trip Spending (among ad-aware visitors)	\$1,181
Ad-Influenced Trip Spending	\$124,806,730
Media Investment	\$226,338
ROI	\$551

Fall 2022 Taxes Generated by Market

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	82,081	19,467	4,086	105,635
Avg. Taxable Trip Spending (among ad-aware visitors)	\$793	\$947	\$947	\$827
Ad-Influenced Taxable Trip Spending	\$65,087,307	\$18,443,122	\$3,871,084	\$87,401,514
Taxes Generated (8.5% tax rate)	\$5,532,421	\$1,567,665	\$329,042	\$7,429,129

- 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 fall 2022 advertising generated \$7.4 million in taxes.

Fall 2022 Tax ROI

- With \$7.4 million in ad-influenced taxes and a media investment of \$226,000, the tax ROI is \$33 for each \$1 invested in the media buy.

	Total
Incremental Trips	105,635
Avg. Taxable Trip Spending (among ad-aware visitors)	\$827
Ad-Influenced Taxable Trip Spending	\$87,401,514
Taxes Generated (8.5% tax rate)	\$7,429,129
Media Investment	\$226,338
Tax ROI	\$32.82

Fall ROI Tracking

	Fall 2019	Fall 2020	Fall 2021	Fall 2022
Target HHs	19,205,673	9,612,930	25,578,115	21,562,811
Ad Awareness	32%	48%	34%	37%
Ad-Aware HHs	6,150,380	4,641,103	8,656,969	8,049,391
Incremental Travel	3.3%	1.5%	0.8%	1.3%
Incremental Trips	204,124	71,415	69,476	105,635
Avg. Trip Spending (among ad-aware visitors)	\$904	\$936	\$977	\$1,181
Ad-Influenced Trip Spending	\$184,568,565	\$66,818,515	\$67,887,580	\$124,806,730
Media Investment	\$278,113	\$233,288	\$159,485	\$226,338
ROI	\$664	\$286	\$426	\$551
Avg. Taxable Trip Spending (among ad-aware visitors)	\$578	\$594	\$675	\$827
Ad-Influenced Taxable Trip Spending	\$118,075,492	\$42,418,245	\$46,911,234	\$87,401,514
*Taxes Generated	\$10,626,794	\$3,817,642	\$3,987,455	\$7,429,129
Tax ROI	\$38	\$16	\$25	\$33

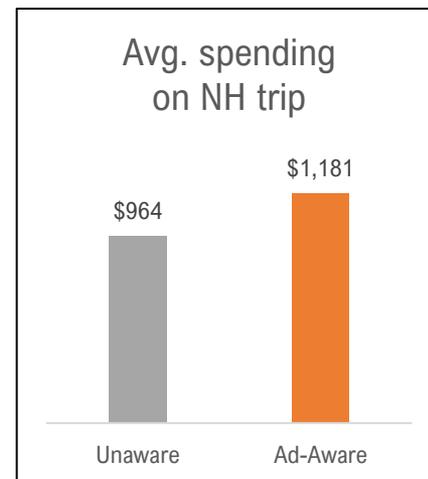
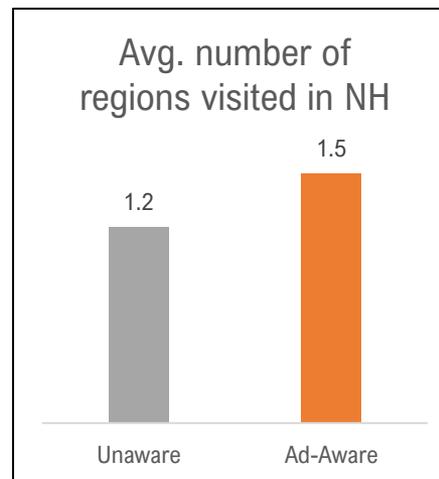
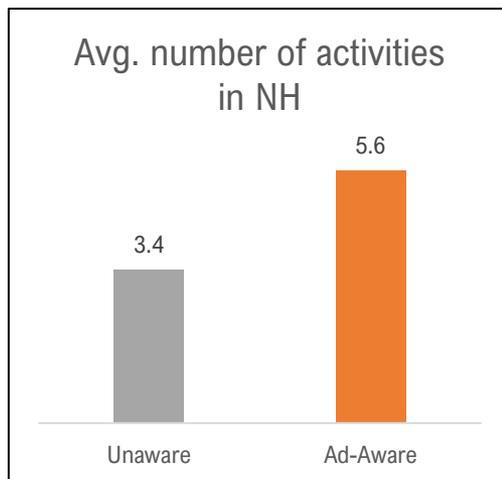
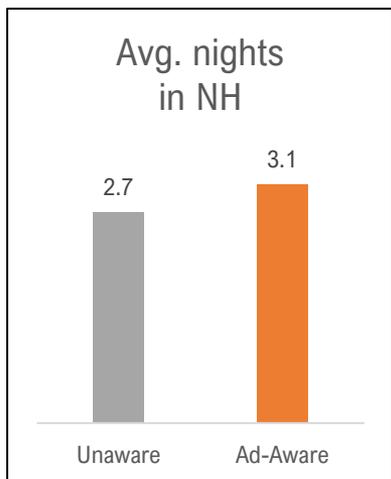
*The tax rate was changed to 8.5% in Fall 2021. The prior tax rate was 9.0%.

- The fall 2022 advertising produced more visitor spending and a higher ROI than the fall 2020 and 2021 advertising but falls short of the pre-pandemic (2019) ROI. A continued return to normalcy is reflected in an increase in visitor spending that outpaces inflation.



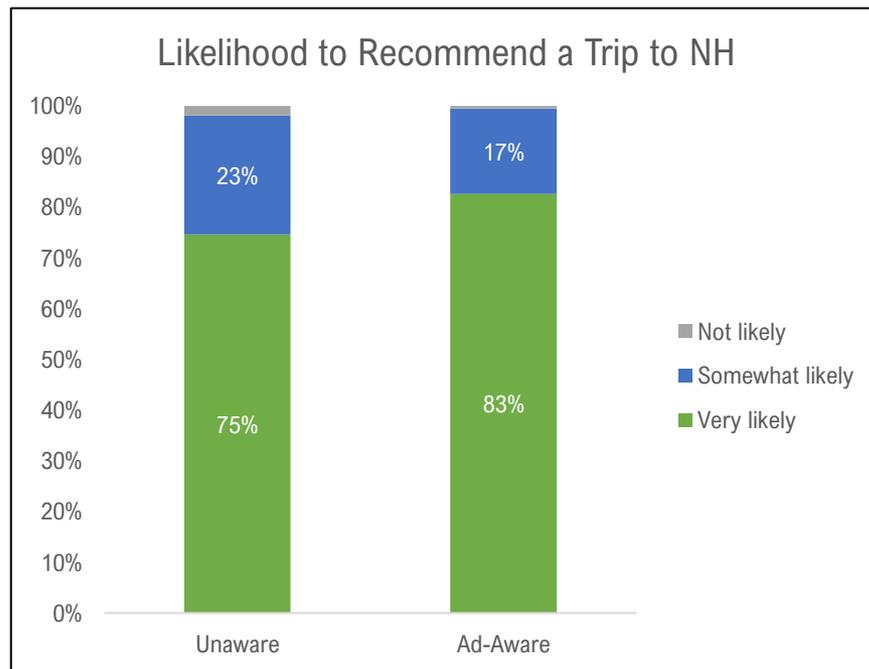
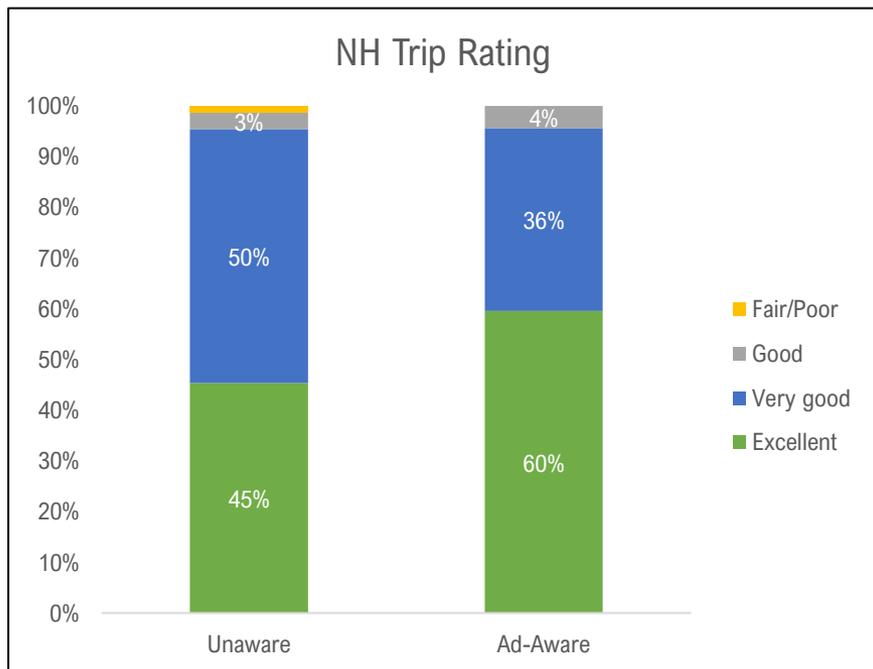
Ad Impact On the New Hampshire Trip

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 fall 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 positive impact on trip rating and likelihood to recommend the state.



Appendix: Questionnaire

**New Hampshire Tourism
Fall Ad Awareness and ROI
November 2022**

SCREENER MODULE

ZIP. What is your ZIP code? _____

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

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

S1. Please indicate which of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, 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	<input type="checkbox"/>	<input type="checkbox"/>
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, HBO Max, or HULU	<input type="checkbox"/>	<input type="checkbox"/>

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.

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

PERCEPTIONS MODULE

1. Thinking about places to go for domestic 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 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					

4. Which of the following states would you 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	

TRAVEL MODULE

5. Have you visited any of the following states since August 2022 for a leisure trip? How many trips did you take in each state since August 2022?

[ROTATE]	States visited since August 2022 (Select all that apply)	Number of visits since August 2022
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 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
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on Twitter
5. Followed Visit New Hampshire on Instagram
6. Received e-newsletter
7. Requested information about a New Hampshire trip in another way
8. None of these

IF Q6_2=1, ASK Q7

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Website



VisitNH.Gov Fall 2022

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Q7. Is this the New Hampshire website you visited?

1. Yes
0. No

IF 6_3=1, ASK Q7A

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\FB Homepage



Fall Facebook Page 2022

Q7a. Is this the New Hampshire Facebook page you accessed?

1. Yes
0. No

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

Now, please give us some information about the trip(s) you took to New Hampshire since August 2022.

9. When since August 2022 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- August 2022
- September 2022
- October 2022
- November 2022

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

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

4

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
- Camping/RVing
- Home of family or friends
- Vacation home
- Other

10bb. 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

11. Which of the following activities did you participate in during your trip to 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
Snow 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

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.

5

INSERT NEW HAMPSHIRE REGIONS MAP

13. 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

13a. Thinking about your overall travel experience in New Hampshire, would you say it...?

- Exceeded your expectations
- Met your expectations
- Failed to meet your expectations

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	
Retail sales	
Visitor air	
Other	
Total	SHOW TOTAL

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	

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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	
---	--

14. 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

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

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. TikTok
9. 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

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

AD AWARENESS MODULE

USA ONLY:

F:\Ads Master\New Hampshire\2022\Fall\Fall 2022\TV\TV_RI_CT_Long Distance



1_FALL 30

<https://vimco.com/767038630>

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

- Yes
 No

FALLvideoB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK FALLTVC

FALLvideoC. Why do you feel that way? _____

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DIGITAL

MA, NY, CT, ME, NH AND RI ONLY

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Display Ads\Core Audience_MA, RI, CT, ME, NH, NY

VisitFallFY23_CoreBoost Fall Activities_300x250	VisitFallFY23_foliage tracker_300x600	VisitFallFY23_Road Trip Retargeting_160x600

DE, , PA, VA, NJ, MD

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Display Ads\Long-Drive Audience_DE, PA, VA, NJ, MD

VisitFallFY23_foliage tracker_300x600	VisitFallFY23_Long Drive_300x250	VisitFallFY23_Road Trip Retargeting_160x600

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MONTREAL ONLY:

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Display Ads\Canadian Audience_Montreal, Toronto\Montreal

VisitFallFY23_Canada Fall Activities French_300x250	VisitFallFY23_foliage tracker_french_300x600	VisitFallFY23_Road Trip Retargeting French_300x600

TORONTO ONLY:

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Display Ads\Canadian Audience_Montreal, Toronto\Toronto

VisitFallFY23_Canada Fall Activities English_300x600	VisitFallFY23_foliage tracker_300x600	VisitFallFY23_Road Trip Retargeting_160x600

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

Yes
No

FallDigitalB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK FallDigitalC

FallDigitalC. Why do you feel that way? _____

SOCIAL

MA, NY, CT, ME, NH AND RI ONLY:

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY



CORE- Foliage Tracker



CORE- Ultimate Road Trip



CORE- Visitor's Guide

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY\Paid Social 15s



IG Story_Hayride

<https://vimeo.com/767041122>



IG Story_Apple Picking

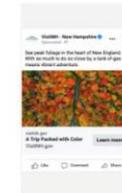
<https://vimeo.com/767040871>

DE, PA, VA, NJ, MD ONLY:

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Long Drive_DE, PA, VA, NJ, MD



Road Trippers- 7 Scenic Drives

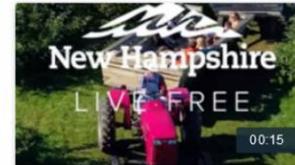


Road Trippers- Ultimate Road Trip



Road Trippers-Foliage Tracker

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY\Paid Social 15s



IG Story_Hayride

<https://vimeo.com/767041122>



IG Story_Apple Picking

<https://vimeo.com/767040871>

MONTREAL ONLY:
 I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Canada Audience_Montreal, Toronto\Montreal



Canada- 5 Fall Experiences (French)



Canada- Visitor's Guide (French)

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY\Paid Social 15s



IG Story_Hayride

<https://vimeo.com/767041122>



IG Story_Apple Picking

<https://vimeo.com/767040871>

TORONTO ONLY:

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Canada Audience_Montreal, Toronto\Toronto



Canada- 5 Fall Experiences (English)



Canada- Visitor's Guide (English)

I:\Ads Master\New Hampshire\2022\Fall\Fall 2022\Social Ads\Core Audience_MA, RI, CT, ME, NH, NY\Paid Social 15s



IG Story_Hayride

<https://vimeo.com/767041122>



IG Story_Apple Picking

<https://vimeo.com/767040871>

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

- Yes
- No

FallSocialB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK FallSocialC

FallSocialC. Why do you feel that way? _____

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

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Where I would be inspired and invigorated	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

29. How much does this campaign make you...?. ROTATE

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

DEMO MODULE

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

- D3. Are you currently ...?
 Married/living as married
 Divorced/Separated
 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?
 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

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- \$150,000 but less than \$200,000
- \$200,000 or more

D2. 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 _____)

D2a. Do you identify as Hispanic or Latino?

- Yes
- No

D1. Are you ...?

- Male
- Female
- Other
- Prefer not to answer

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