



New Hampshire

LIVE FREE

2021 Spring/Summer
Advertising Effectiveness ROI
& Photo Test Research
October 2021



insights
Strategic Marketing and Research

Background & Objectives

- The New Hampshire Division of Travel and Tourism Development (the Division) ran 2021 spring/summer advertising in existing northeastern U.S. target markets and in new/more distant expansion markets.
- The advertising marks a return to normalcy after the Division halted the planned 2020 spring/summer marketing efforts in response to the COVID-19 pandemic, instead running a recovery campaign. This recovery advertising included a specific in-state focus to encourage residents to vacation in New Hampshire and to support local businesses.
- The Division has partnered with Strategic Marketing & Research Insights (SMARInsights) to assess 2021 spring/summer advertising effectiveness. An initial ad awareness/creative evaluation/destination image research wave was completed in July 2021. This current research wave focuses on the impact of the advertising and the return on the media investment as well as an evaluation of a set of New Hampshire photos.
- 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 2021;
 - Exploring the results by existing and expansion market groups;
 - Evaluating a group of New Hampshire photos in terms of overall reaction, association with New Hampshire, and impact on opinion of New Hampshire; and
 - Providing insights to guide marketing decision-making.

Methodology

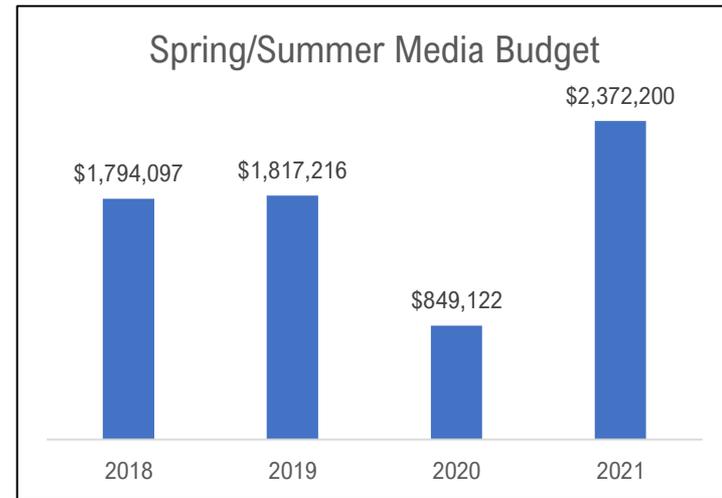
- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. This method provides a representative measure of aided ad awareness.
- National sample vendors with representative panels are used so that the results can be projected 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 spring/summer 2021 advertising was aimed at existing northeastern target markets and more distant “expansion markets.” Ad spending by market is provided on the following page.
- A total of 2,016 ROI wave surveys were completed in September 2021. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the ROI wave research results.

Market Group	Market	Completed Surveys
Existing Target Markets	New Hampshire	100
	Connecticut	102
	Massachusetts	200
	Rhode Island	100
	Maine	100
	Vermont	100
	New York	201
	New Jersey	200
Expansion Markets	Pennsylvania	203
	Delaware	106
	Maryland	150
	Virginia	151
	North Carolina	152
	Ohio	151
	Total	2,016

Campaign Overview



Market	Print	TV	CTV	Out of Home	Digital Display	Radio	Social	Total
NH	\$5,455	\$65,001	\$15,500	\$24,925	\$270,938	\$10,842	\$19,642	\$412,302
MA	\$5,455	\$78,750	\$15,500	\$260,775	\$25,938	\$10,842	\$19,642	\$416,901
RI	\$5,455	\$67,976	\$27,167	\$37,500	\$48,375	\$15,008	\$33,208	\$234,690
CT	\$5,455	\$55,031	\$27,167	\$28,900	\$48,375	\$15,008	\$33,208	\$213,144
ME	\$5,455	\$15,000	\$15,500	\$0	\$25,938	\$0	\$19,642	\$81,534
NY	\$0	\$237,320	\$27,167	\$358,431	\$48,375	\$15,008	\$33,208	\$719,509
NJ	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
PA	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
DE	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
MD	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
VA	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
NC	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
OH	\$0	\$0	\$6,786	\$0	\$17,438	\$8,327	\$9,467	\$42,017
Total	\$27,275	\$519,078	\$175,500	\$710,531	\$590,000	\$125,000	\$224,816	\$2,372,200



Total Existing Target Markets = \$2,120,097
Total Expansion Markets = \$252,103

- The spring/summer 2021 campaign included print, TV/CTV, out of home, digital display, radio, and social media advertising.
- 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 investment is much larger in the existing target markets than in the expansion markets.
- The overall 2021 investment is notably larger than the prior year when the Division shifted strategy in response to the COVID-19 pandemic. The 2021 investment is also the largest over the past four years.
- The entire collection of ads tested can be found in the questionnaire in the Appendix.

Insights: Wave 1 Review

- The 2021 spring/summer advertising generated 41% awareness in the existing and expansion target markets, translating into about 10.5 million ad-aware households and a relatively efficient cost per aware household of \$0.23 (the industry average for a similar campaign is \$0.51).
- Adding the expansion target markets led to a notable increase in ad-aware households compared to the prior three spring/summer campaigns. The expansion also led to the second-lowest cost per aware household recorded over the past four years despite the largest media investment.
- Reaction to the 2021 advertising is similarly positive in the existing and expansion markets. There is almost no negative reaction to the ads.
- The 2021 advertising is “excellent” or “good” from an industry benchmarking standpoint at communicating key messages in the existing and expansion markets. From an evaluative ratings standpoint, the 2021 advertising is also excellent at generating interest in NH travel in both market groups.

Insights: Ad Influence & ROI

The wave 1 research foreshadowed strong results in both the existing and expansion markets. The wave 2 research reveals that this is the case:

- The spring/summer 2021 advertising influenced New Hampshire leisure travel from both market groups. The level of impact is greater in the existing target markets than in the expansion markets, which is expected given that the existing markets are more established and more proximate to New Hampshire – and travel during the pandemic has tended to occur closer to home.
- The level of advertising influence translates into about 439,000 New Hampshire trips from March 2021 through September 2021. About 7 in 10 ad-influenced trips came from the existing target markets.
- The spring/summer 2021 advertising influenced about \$498 million in visitor spending. With a media investment of \$2.4 million, this means an ROI of \$210 in visitor spending for each \$1 invested – and \$13 in tax revenue for each \$1 invested. These ROI results are the strongest measured over the past several years.

Insights: Ad Influence & ROI

- The advertising generated ROI in both market groups, although the expansion markets (\$638 ROI) stand out compared to the existing target markets (\$159 ROI). The small media investment in the expansion markets generated a strong initial level of ad awareness, travel, and ROI. This phenomenon can occur when effective advertising introduces a novel product into new target markets, and we would expect to see a reduction of this effect in future expansion market efforts. Moreover, the expansion market result is softened a bit when considering that these markets account for 55% of target households but just 29% of ad-influenced trips.
- There are some notable differences in trip specifics among the expansion market visitors, including longer trips, higher incidence of kids in the travel party, higher overall trip spending, and higher incidence of staying in hotels, B&Bs, and luxury resorts.
- The advertising promotes New Hampshire's variety in close proximity by featuring normally separated landscapes like seacoast and mountains. New Hampshire is rare in that both topographies can be visited in in the same day. However, of those who visited the White Mountains only 8% visited the Sea Coast. A slightly higher percentage of Sea Coast visitors also went to the White Mountains (20%). So, there is an opportunity to increase the incidence of cross-regional road trips.

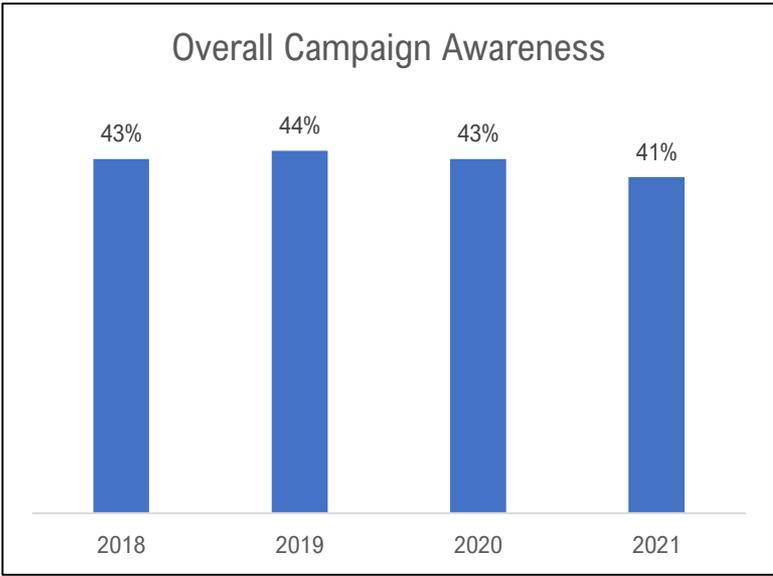
Insights: Photo Test

- The photos that feature water and/or dramatic scenery are viewed most favorably. The most favorable photos are “Beach Family,” “Pawtuckaway Paddleboarding,” “Dock,” “Sunset Cruise,” “Kayak with a View,” and “Willard Peak.” These are also the photos that are most likely to have a positive impact on consumers’ opinions of New Hampshire.
- The photos that show potentially dangerous activities or culture are viewed less favorably but are still mostly “favorable” or “neutral.” So, none of these photos would repel potential visitors – but some certainly have broader appeal than others.
- Photos featuring mountain vistas, fall foliage, and outdoor adventure are the most likely to be associated with New Hampshire. But a high of 26% association with the state suggests a lack of truly iconic imagery.
- The “state associated with” results suggest that:
 - New Hampshire is seen as a place with bridges, vistas and outdoor adventure.
 - New York and Massachusetts are arts and culture.
 - Rhode Island is beach.
 - Vermont is snow sports.
- These results align with and build upon the results of the destination image study conducted earlier this year (i.e., New Hampshire is differentiated by mountain scenery, and outdoor adventure).

Wave 1 Review

This section includes a review of the key wave 1 findings of ad awareness, creative ratings, and ad impact on perceptions and preference to set the stage for the subsequent evaluation of advertising influence on New Hampshire travel.

Overall Campaign Awareness Compared to Recent Years

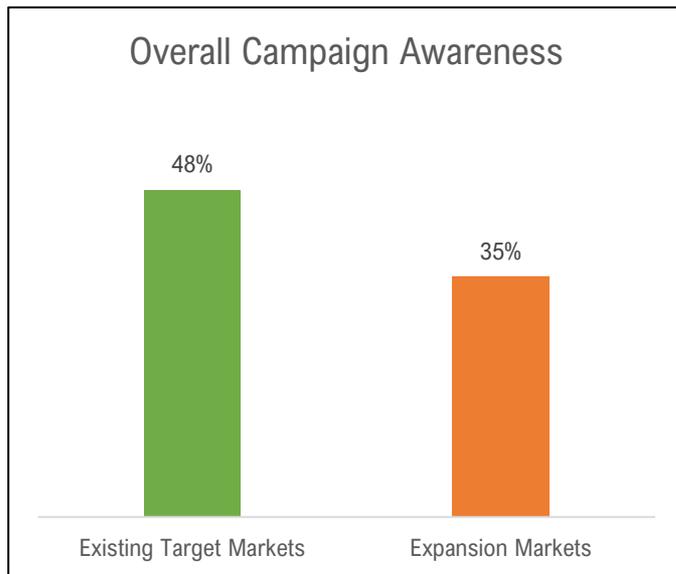


	2018	2019	2020	2021
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229
Ad Awareness	43%	44%	43%	41%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200
Cost per Aware HH	\$0.29	\$0.25	\$0.16	\$0.23

- The level of ad awareness is down slightly, but the expansion into more markets led to the second-lowest cost per aware household recorded over the past four years.



2021 Overall Awareness by Market Group



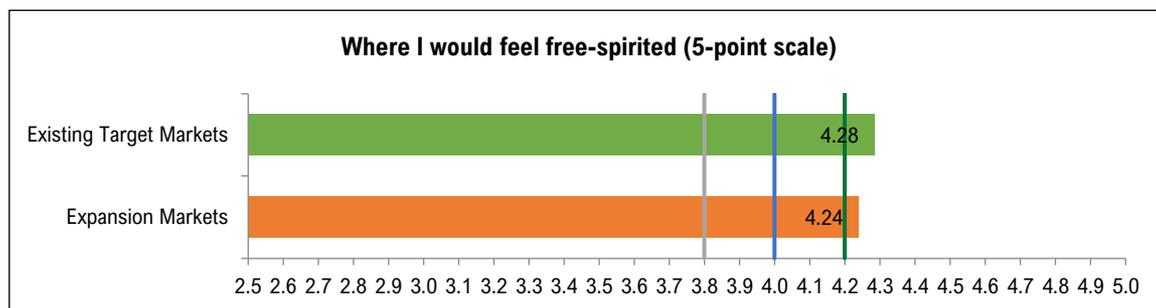
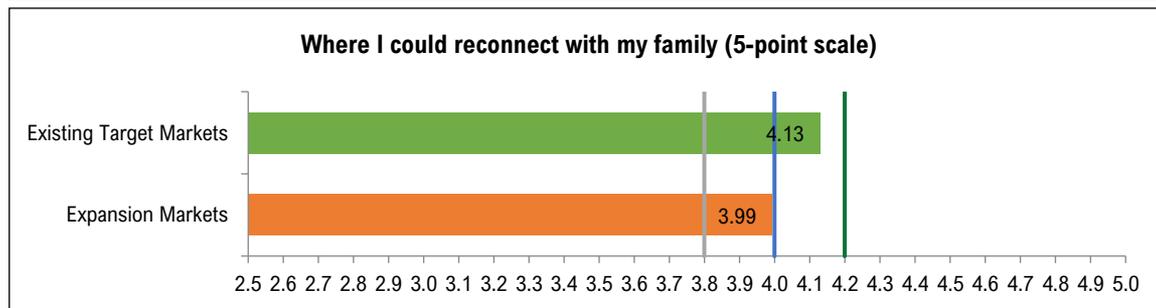
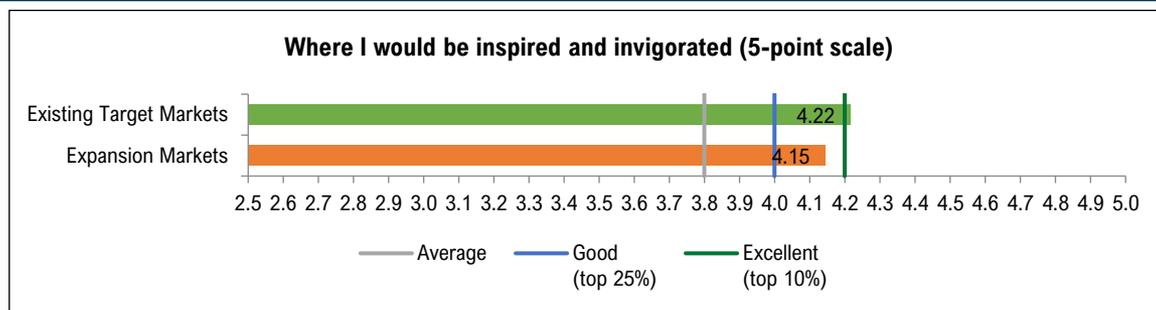
	Existing Target Markets	Expansion Markets
Target HHs	11,681,517	14,083,712
Ad Awareness	48%	35%
Ad-Aware HHs	5,568,100	4,942,434
Media Investment	\$2,120,097	\$252,103
Cost per Aware HH	\$0.38	\$0.05



- As anticipated, ad awareness is higher in the existing target markets. The media investment was larger in these markets – and these consumers have been exposed to similar New Hampshire messaging for many years.
- While awareness is lower in the expansion markets, the ads reached nearly as many households here – resulting in a remarkably efficient media buy in terms of cost per aware household.

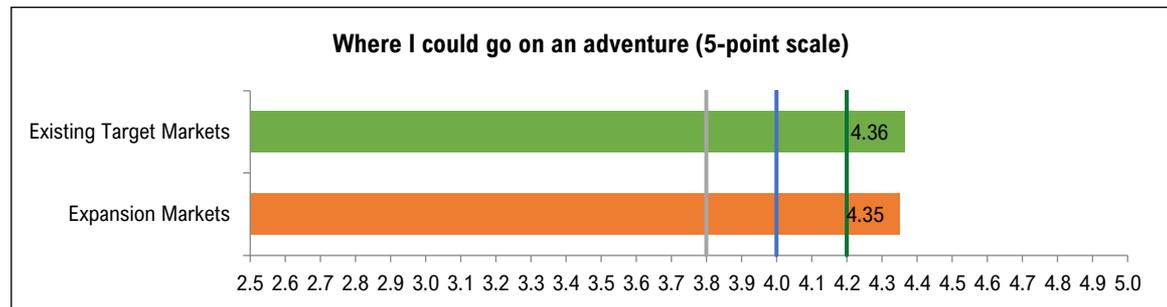
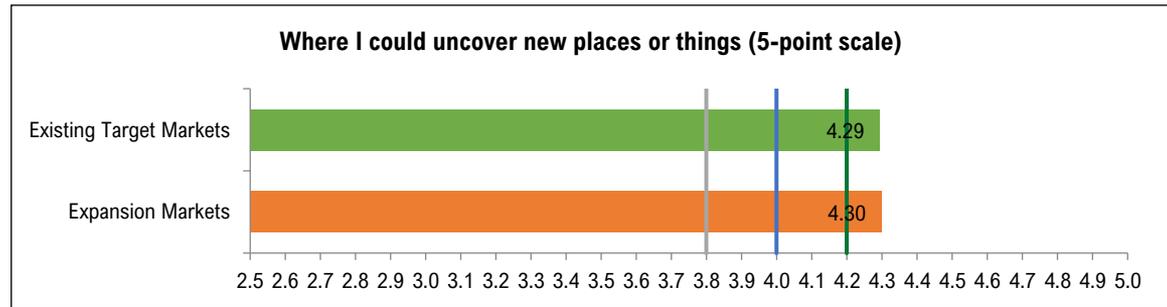
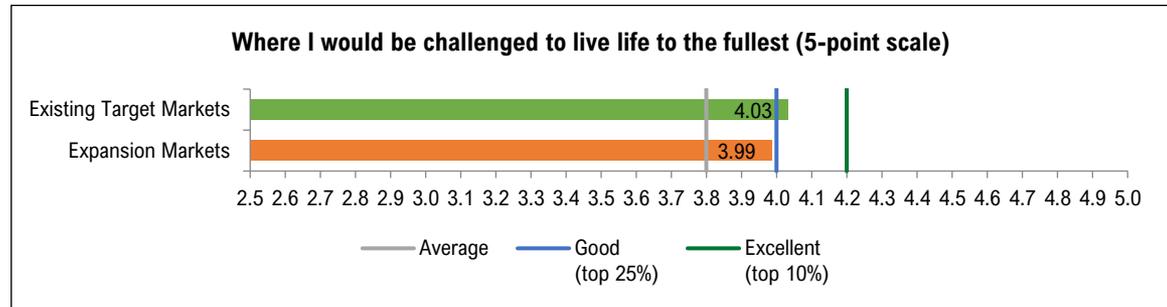
Communication Attributes

- The 2021 advertising is “excellent” or “good” from an industry benchmarking standpoint in both market groups for communicating these messages.
- The reaction is more positive in the existing target markets, but the expansion market consumers are certainly receptive to the message.



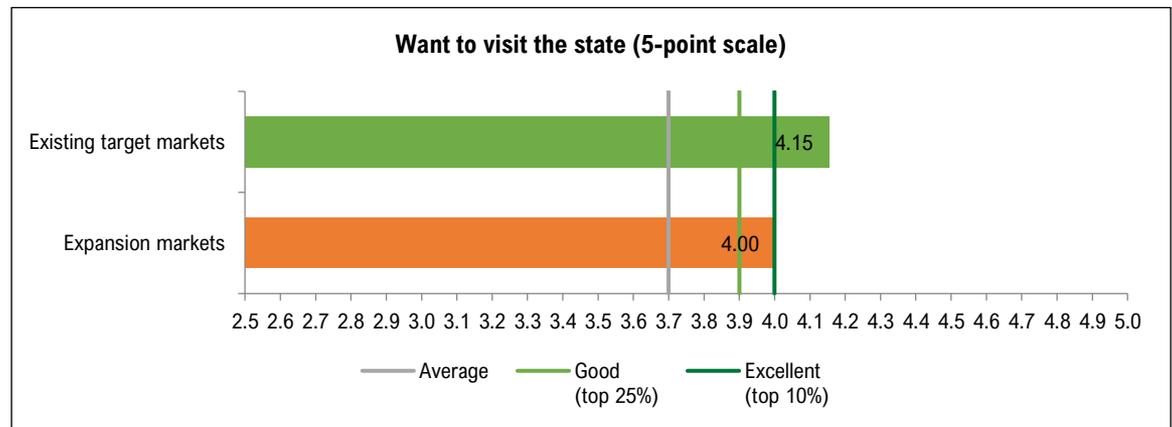
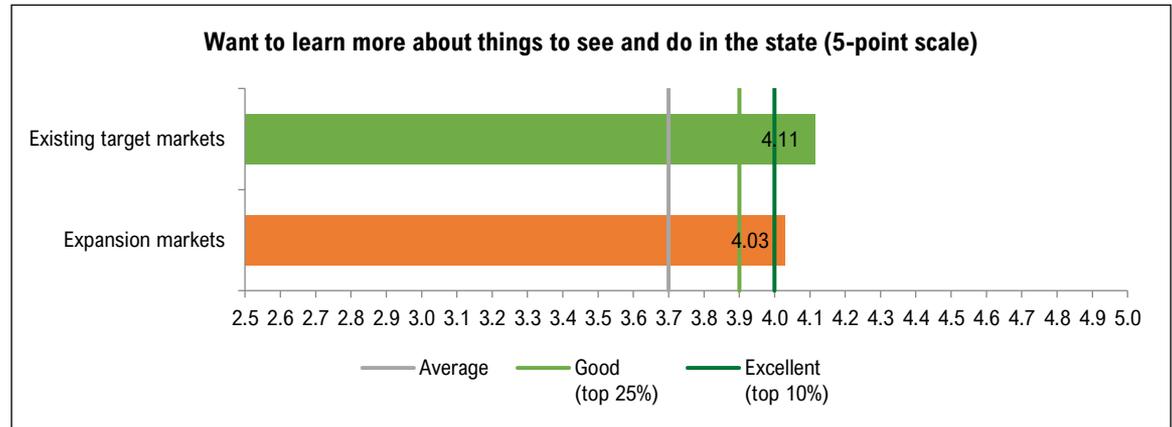
Communication Attributes Cont.

- Again, we see that the 2021 advertising is “excellent” or “good” from an industry benchmarking standpoint in both market groups for communicating these remaining messages.
- Here the reaction is similarly positive across market groups.



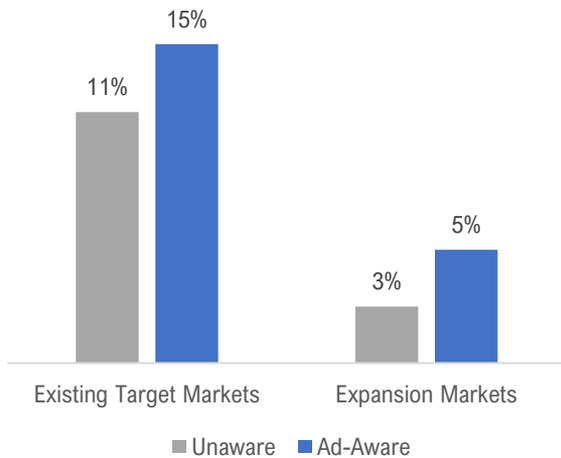
Impact Attributes

- From this evaluative ratings standpoint the 2021 advertising is excellent at generating interest in NH travel in both market groups.
- Actual ad impact on perceptions and intent to travel are reviewed in the next section.

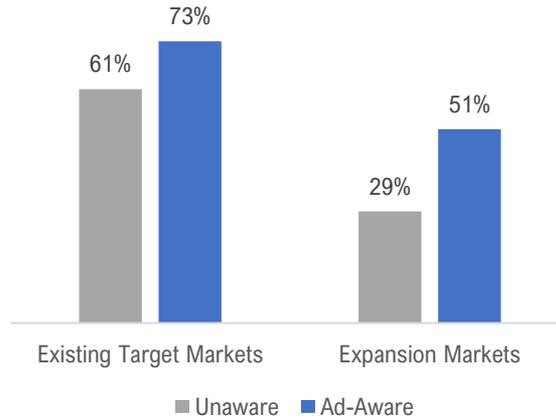


Ad Impact On Top of Mind, Familiarity, and Preference

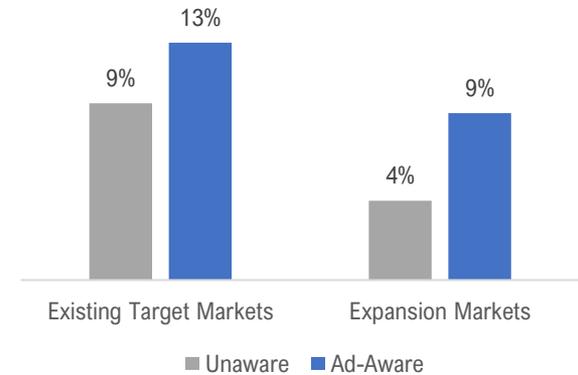
Top-of-Mind Consideration



Familiar with New Hampshire Leisure Travel Product



Picked New Hampshire as Preferred Leisure Travel Destination



- The 2021 advertising has a positive impact on top-of-mind consideration, familiarity, and preference in both market groups.

Wave 2 ROI Results

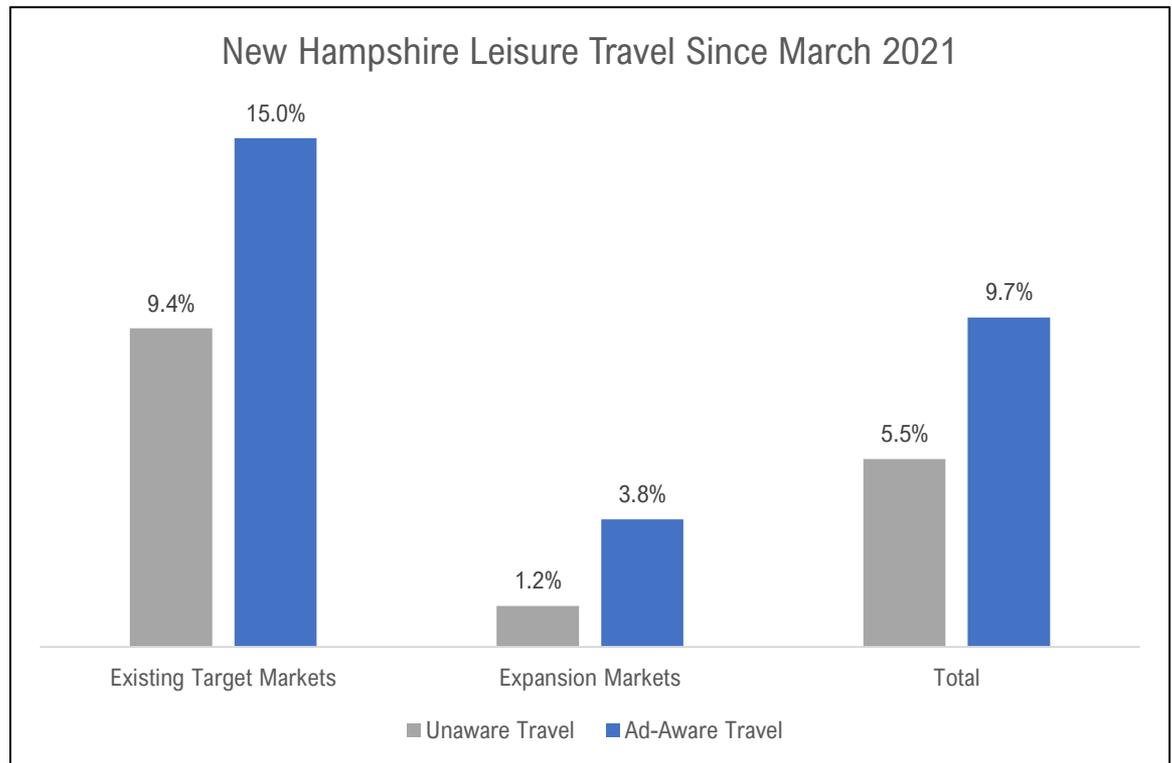
Incremental Travel Review

- 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 2021 Incremental Travel

- The spring/summer 2021 advertising influenced New Hampshire leisure travel from both market groups.
- The level of impact is greater in the existing target markets than in the expansion markets, which is the expected result given that the existing markets are more established and more proximate to New Hampshire – and travel during the pandemic has tended to occur closer to home.



Spring/Summer 2021 Ad-Influenced Trips

	Existing Target Markets	Expansion Markets	Total
Target HHs	11,681,517	14,083,712	25,765,229
Ad Awareness	48%	35%	41%
Ad-Aware HHs	5,568,100	4,942,434	10,510,535
Incremental Travel	5.6%	2.6%	4.2%
Incremental Trips	312,385	126,419	438,804

- The level of advertising influence translates into about 439,000 New Hampshire trips from March 2021 through September 2021.
- About 7-in-10 ad-influenced trips came from the existing target markets.

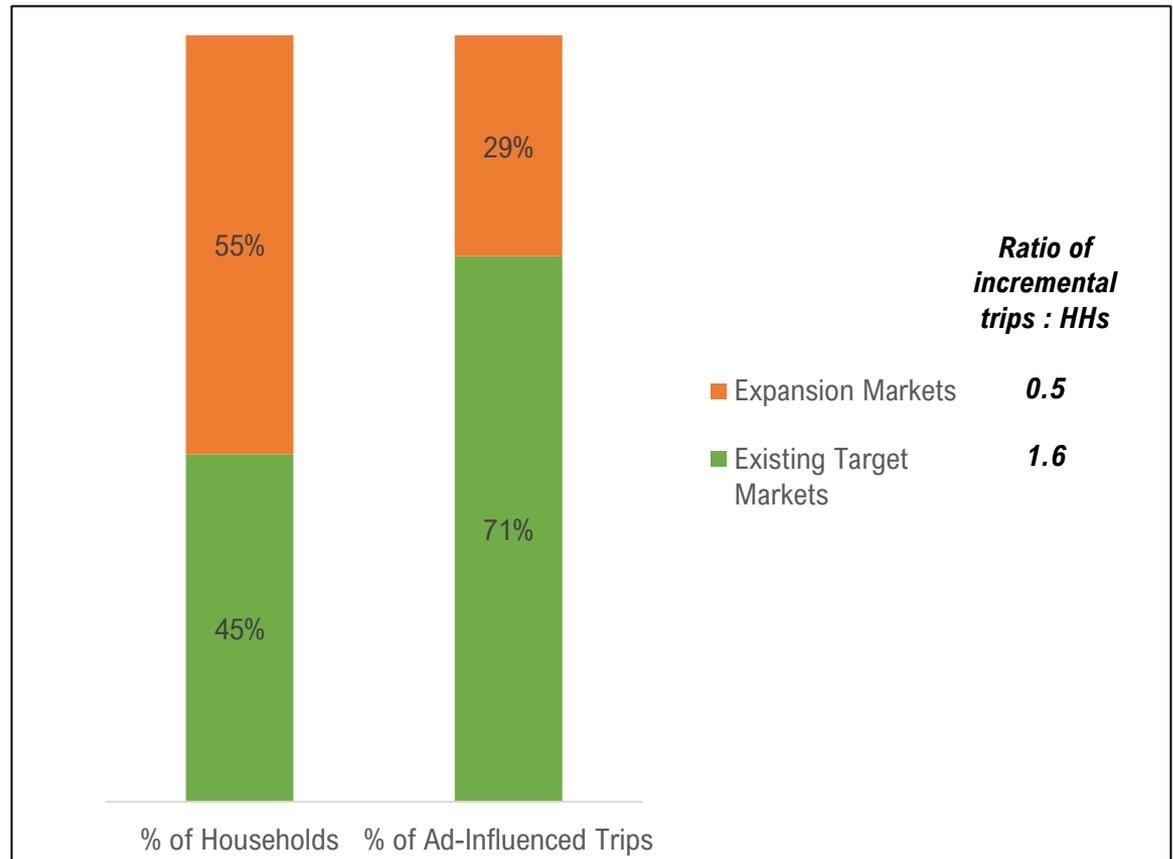
Spring/Summer 2021 ROI

	Existing Target Markets	Expansion Markets	Total
Incremental Trips	312,385	126,419	438,804
Avg. Trip Spending (among ad-aware visitors)	\$1,079	\$1,272	\$1,135
Ad-Influenced Trip Spending	\$337,052,019	\$160,787,933	\$497,839,953
Media Investment	\$2,120,097	\$252,103	\$2,372,200
ROI	\$159	\$638	\$210

- With average trip spending of \$1,135, the spring/summer 2021 advertising influenced about \$498 million in revenue.
- This means an ROI of \$210 for each \$1 invested in the media buy.
- The advertising generated a positive ROI in both market groups, although the expansion markets stand out for having a relatively strong ROI. The small media investment in these new markets generated a strong initial level of ad awareness, travel, and ROI. This phenomenon often occurs when effective advertising is introduced into new target markets, and we would expect to see a reduction of this effect in the future.

Market Performance

- Comparing each market group's percentage of the population to percentage of ad-influenced trips results in a "performance ratio."
- While the expansion markets generated a remarkably strong ROI, the result is softened a bit when considering this ratio. These markets account for 55% of target households, but just 29% of ad-influenced trips.
- This is not to diminish the advertising effectiveness in these markets or their potential for future advertising campaigns, it is just meant to be another lens through which to review the results.



Spring/Summer 2021 Tax ROI

	Existing Target Markets	Expansion Markets	Total
Incremental Trips	312,385	126,419	438,804
Avg. Taxable Trip Spending (among ad-aware visitors)	\$790	\$749	\$778
Ad-Influenced Taxable Trip Spending	\$246,814,963	\$94,741,276	\$341,556,238
Taxes Generated	\$22,213,347	\$8,526,715	\$30,740,062
Media Investment	\$2,120,097	\$252,103	\$2,372,200
Tax ROI	\$10.48	\$33.82	\$12.96

- 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 2021 spring/summer advertising generated \$30.7 million in taxes. Given media spending, the 2021 spring/summer ads returned \$12.96 in tax revenue for each \$1 invested.

ROI Tracking

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

- The spring/summer 2021 ROI produced the highest ROI of the past four years.

Agritourism

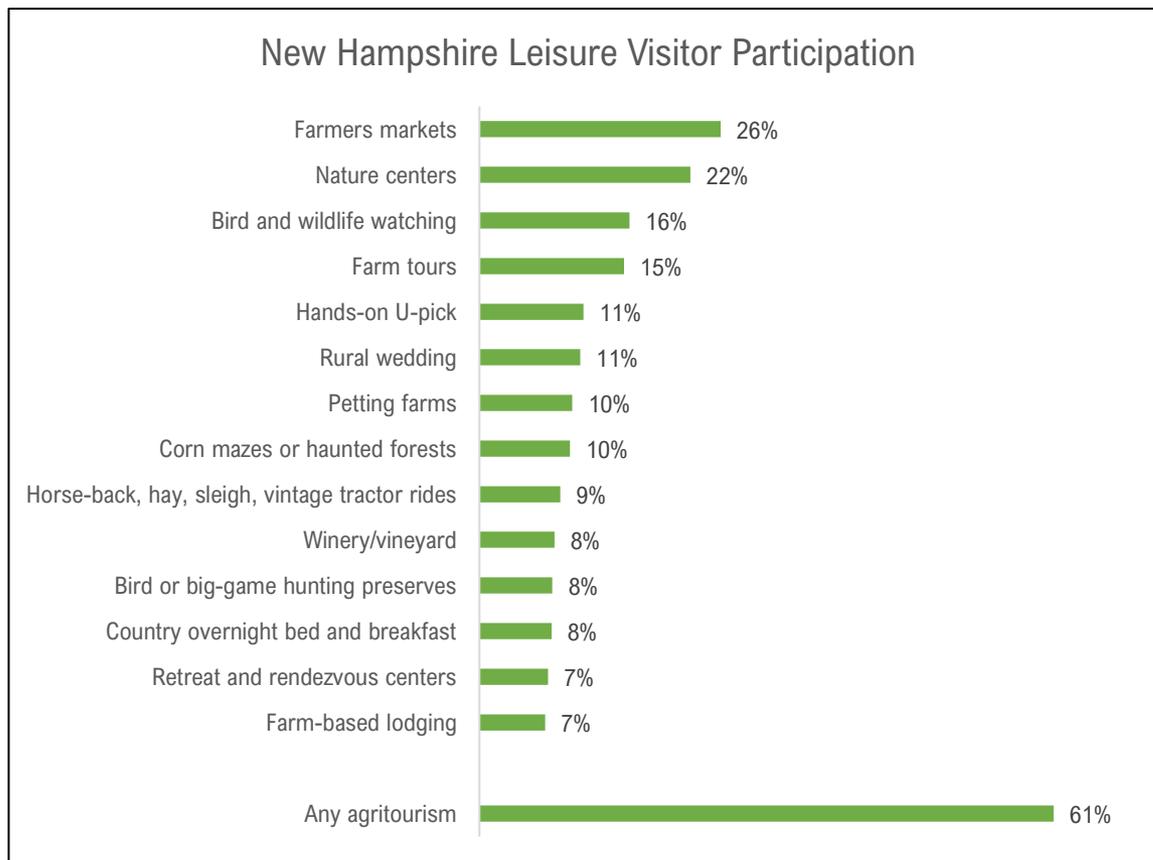
New to this 2021 research is a review of participation in and spending on New Hampshire agritourism. This evaluation does not consider advertising influence; rather, the results are among all visitors.

Agritourism Activity/Attraction Categories

Retreat and rendezvous centers
Nature centers
Farm tours
Farm-based lodging
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 rides
Farmers markets
Rural wedding

Participation and Spending

- Nearly two-thirds of New Hampshire spring/summer 2021 leisure visitors indicate that they participated in agritourism.
- Farmers markets and nature centers are the top agritourism attractions.
- On average, visitors who participated in agritourism spent \$242 on these attractions/activities.



Visitor Spending of Agritourism

- Based on overall rates of New Hampshire travel during the March 2021 through September 2021 period and average spending on agritourism among these those participating, this sector accounts for about \$237 million in visitor spending in an 8-month period, or about \$30 million per month.

	Existing Target Markets	Expansion Markets	Total
Target HHs	11,681,517	14,083,712	25,765,229
New Hampshire Visitation March 2021 - September 2021	11.6%	1.7%	6.2%
New Hampshire Visitors from Target Markets March 2021 - September 2021	1,354,802	244,236	1,599,038
Participated in Agritourism	58%	79%	61%
New Hampshire Visitors from Target Markets March 2021 - September 2021 Participating in Agritourism	786,043	193,962	980,005
Avg. Spending on Agritourism	\$213	\$358	\$242
Visitor Spending on Agritourism	\$167,589,307	\$69,499,741	\$237,089,048

New Hampshire Trip Specifics

Spring/Summer Trip Specifics Tracking

Trip Specifics	2018	2019	2020	2021 Existing Target Markets	2021 Expansion Markets
Nights in New Hampshire	3.1	3.0	3.1	3.0	5.1
People in your travel party	3.2	3.2	3.0	3.4	3.0
Kids on trip	30%	31%	40%	38%	56%
Overall average spending	\$712	\$882	\$961	\$968	\$1,157
Per person/per day spending	\$72	\$94	\$102	\$94	\$76
Lodging					
Mid-level hotel	32%	29%	23%	23%	35%
Home of family or friends	22%	21%	33%	18%	16%
Budget hotel or motel	12%	12%	11%	15%	19%
Bed and breakfast/Inn	7%	12%	7%	6%	19%
Airbnb	4%	12%	16%	17%	12%
Camping/RVing	12%	9%	17%	14%	4%
High-end full-service hotel	8%	8%	6%	10%	23%
Luxury resort hotel	8%	7%	8%	9%	20%
Vacation home	7%	5%	15%	5%	7%

- There are some notable differences among the expansion market visitors, including longer trips, higher incidence of kids in the travel party, higher overall trip spending, and higher incidence of staying in mid-level hotels, B&Bs, high-end hotels, and luxury resorts.

Trip Activities by Market Group

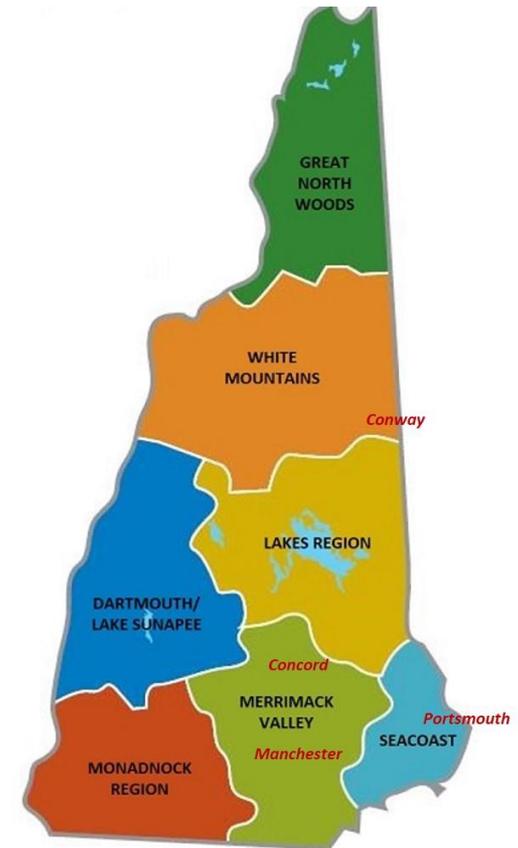
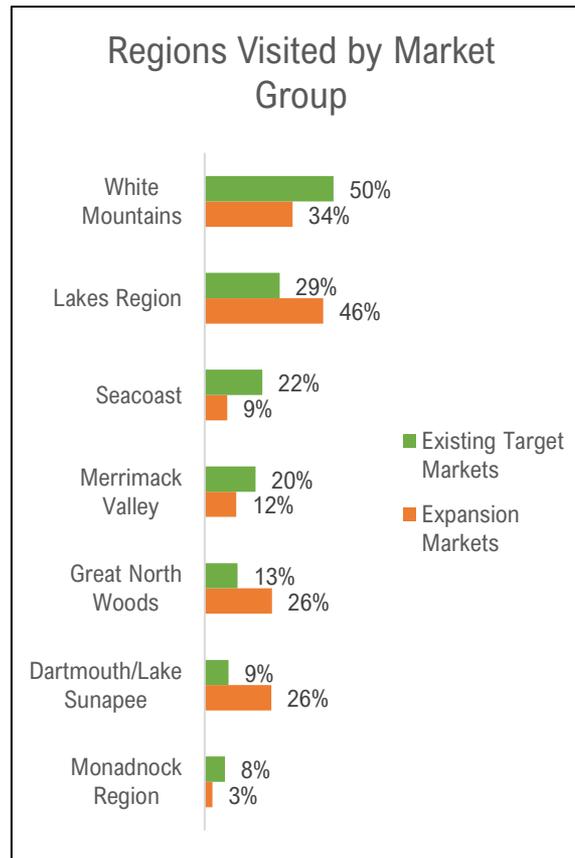
Statistically significant difference across groups

- Overall, the top New Hampshire trip activities are scenic drives, shopping, local dining, hiking, wildlife watching, visiting parks, and sightseeing tours.
- The visitors from the expansion markets are more likely than those from the closer-in existing markets to participate in several activities, as indicated by green highlighting in the table.

Trip Activity	Existing Target Markets	Expansion Markets
Scenic drive	48%	40%
Shopping	47%	39%
Dining at locally owned restaurants	44%	30%
Hiking or backpacking	33%	26%
Wildlife watching	22%	29%
Visiting a state or national park	21%	14%
Sightseeing tour	17%	28%
Camping	15%	22%
Farmer's markets/U-picks/roadside stand	15%	8%
Visiting historical sites	13%	35%
Visiting a noteworthy bar or nightclub	10%	16%
Boating	9%	34%
Bicycling or mountain biking	8%	10%
Fishing	8%	27%
Canoeing or kayaking	8%	9%
Attending a play or concert	7%	21%
Bird watching	7%	8%
Attending a festival or fair	7%	7%
Golfing	6%	3%
Beer trail	6%	8%
Farm to table dinner	6%	5%
Winery tours	6%	9%
Attending performing arts (music/theater)	5%	9%
Visiting museums	5%	29%
ATVing	5%	5%
Rock climbing	5%	10%
Horseback riding	5%	13%
Hunting	5%	4%
River rafting	4%	23%

Regions Visited

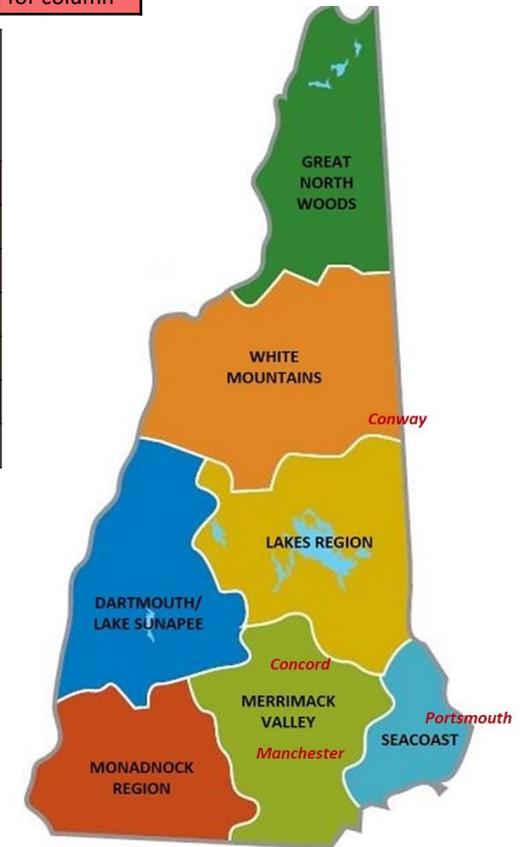
- Visitors from both market groups went to 1.5 regions on average.
- There are some differences by market group, such as the existing market visitors being more likely to go to the White Mountains regions and the expansion market visitors being more likely to go to the Lakes, Great North Woods, and Dartmouth regions.



Region Overlap

Above average for column
Average for column
Below average for column

	Great North Woods	White Mountains	Dartmouth/Lake Sunapee	Lakes Region	Monadnock Region	Merrimack Valley	Seacoast
Great North Woods		20%	23%	21%	13%	12%	3%
White Mountains	57%		36%	31%	39%	12%	20%
Dartmouth/Lake Sunapee	19%	10%		12%	14%	13%	7%
Lakes Region	43%	23%	31%		26%	34%	20%
Monadnock Region	5%	6%	7%	5%		10%	10%
Merrimack Valley	13%	5%	17%	18%	28%		32%
Seacoast	3%	8%	9%	11%	30%	33%	



- While visitors went to just 1.5 regions on average, there is some overlap as indicated in the table. For instance, of those who visited the Great North Woods, 57% visited the White Mountains region and 43% visited the Lakes region.
- The advertising promotes New Hampshire’s variety within proximity by featuring normally separated landscapes like seacoast and mountains. New Hampshire is rare in that both topographies can be visited in in the same day. However, of those who visited the White Mountains only 8% visited the Seacoast. A slightly higher percentage of Seacoast visitors also went to the White Mountains (20%). So, there is an opportunity to increase the incidence of cross-regional road trips.

New Hampshire Image (Photo) Test

The next section reviews the results of an image test, which includes overall reaction to, state associated with, and impact on opinion of New Hampshire of several photos. The photos fall into two categories: outdoor recreation and cultural. The inventory of photos tested is provided on the next two slides.

Photos Tested: Outdoor Recreation



ATV



Beach Family



Dock



Gondola



Kayak with a View



Mountain Bike



Mt. Washington Hiking Trail



Pawtuckaway Paddleboarding



Skiing & Riding



Snowmobiling



Speed Boat



Sunset Cruise



Surf



Train Ride



Willard Peak



Ziplining

Photos Tested: Cultural



Hanover Cornish Bridge



Hanover Dartmouth Art



Hanover Orozco Mural



Hanover Shaker Museum



Millyard Museum



Monadnock Region Foliage Central Square



Monadnock Region Foliage Stone Arch Bridge



Portsmouth



Seacoast Spring



State House

Overall Reaction

- The photos that feature water and/or dramatic scenery are viewed most favorably.
- The photos that show potentially dangerous activities or culture are viewed less favorably but are still mostly “favorable” or “neutral.”
- So, none of these photos would repel potential visitors – but some certainly have broader appeal than others.

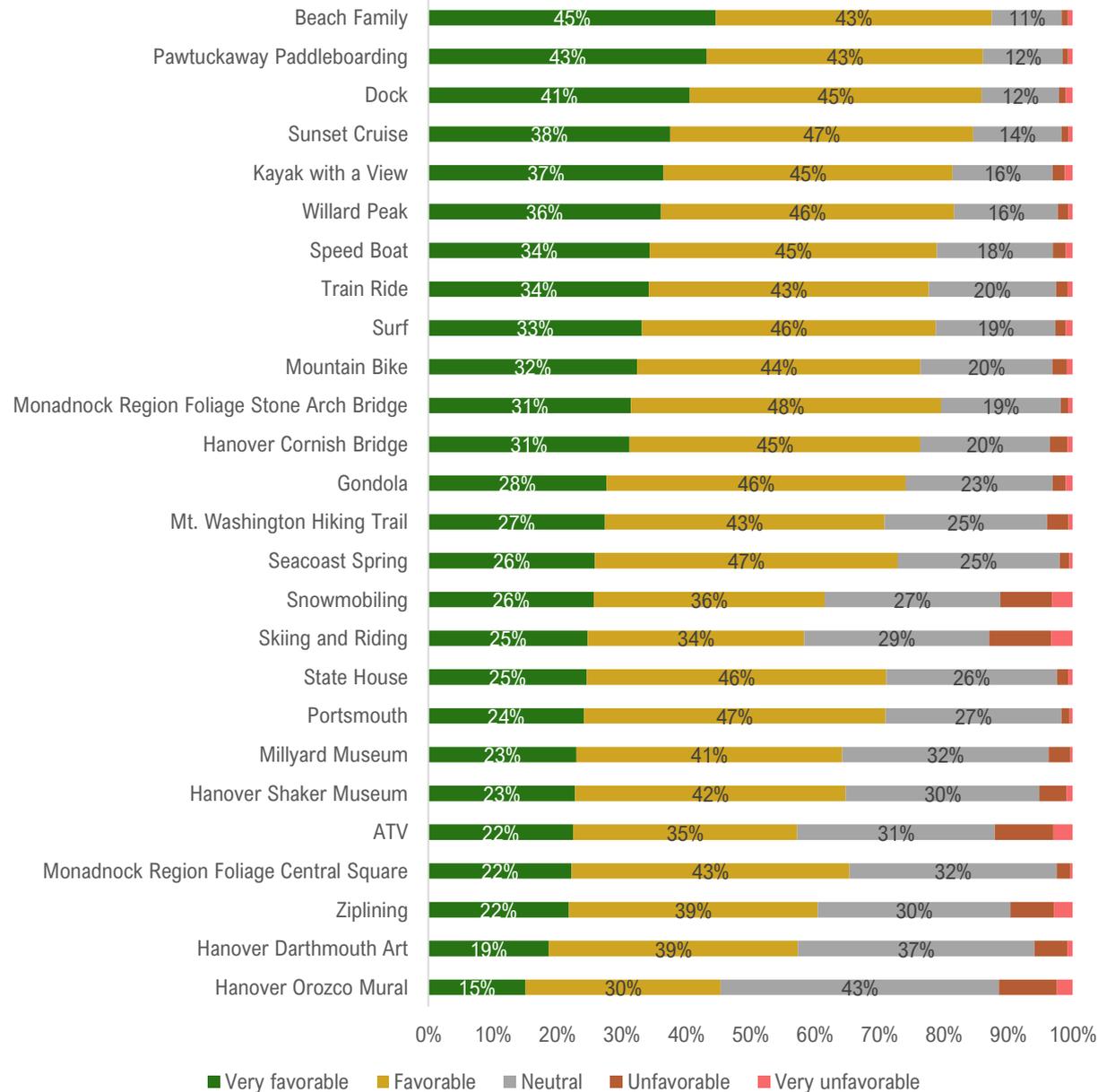
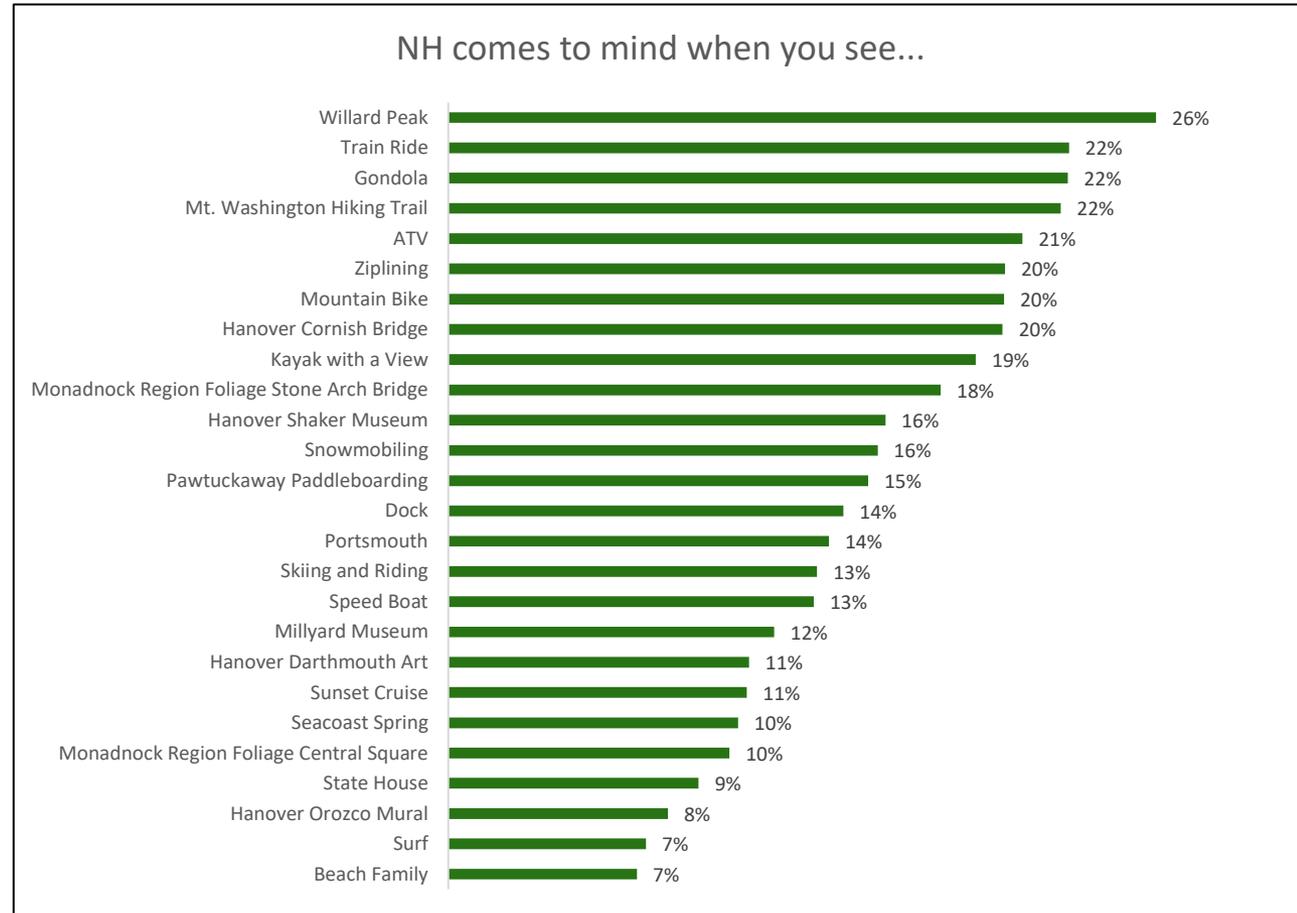


Photo Association with NH

- Mountain vistas, fall foliage, and outdoor adventure are most likely to be associated with New Hampshire.
- But a high of 26% association suggests a lack of truly iconic imagery (of the photos tested).



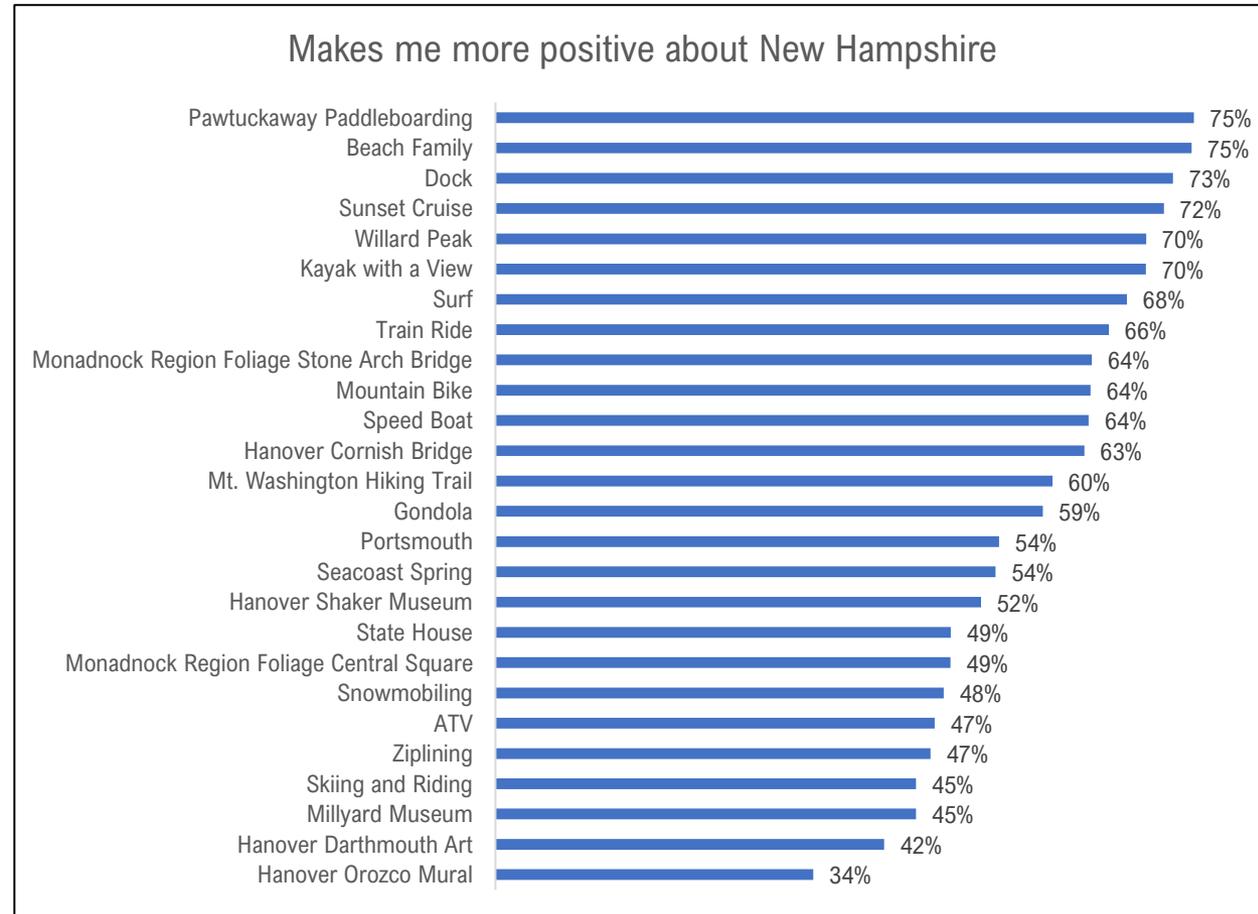
What State Comes to Mind?

- The results of this exercise suggest that:
 - NH is seen as a place with bridges, vistas and outdoor adventure.
 - NY and MA are arts and culture.
 - RI is beach.
 - VT is snow sports.
- These results align with and build upon the results of the destination image study conducted earlier this year: New Hampshire is differentiated by mountain scenery and outdoor adventure.

	NH	CT	NY	ME	MA	RI	VT
State House	9%	14%	16%	5%	42%	8%	5%
Portsmouth	14%	16%	12%	8%	34%	8%	8%
Hanover Cornish Bridge	20%	16%	9%	14%	12%	8%	21%
Hanover Dartmouth Art	11%	17%	14%	6%	40%	8%	5%
Hanover Orozco Mural	8%	13%	45%	7%	15%	8%	5%
Hanover Shaker Museum	16%	18%	10%	10%	27%	8%	11%
Monadnock Region Foliage Central Square	10%	15%	13%	5%	45%	7%	5%
Monadnock Region Foliage Stone Arch Bridge	18%	18%	16%	13%	14%	10%	11%
Millyard Museum	12%	15%	20%	8%	27%	10%	9%
Seacoast Spring	10%	15%	21%	13%	21%	12%	8%
Mt. Washington Hiking Trail	22%	8%	11%	23%	8%	8%	20%
Surf	7%	9%	16%	19%	17%	28%	4%
Mountain Bike	20%	13%	14%	17%	10%	8%	19%
ATV	21%	10%	17%	19%	9%	9%	16%
Willard Peak	26%	8%	13%	17%	8%	6%	23%
Gondola	22%	10%	18%	16%	8%	8%	17%
Sunset Cruise	11%	11%	23%	19%	12%	18%	6%
Speed Boat	13%	10%	22%	20%	11%	18%	6%
Kayak with a View	19%	10%	16%	23%	9%	9%	14%
Dock	14%	9%	19%	24%	10%	15%	8%
Beach Family	7%	10%	14%	23%	16%	26%	3%
Pawtuckaway Paddleboarding	15%	8%	19%	26%	8%	11%	12%
Skiing and Riding	13%	7%	13%	12%	4%	3%	48%
Snowmobiling	16%	7%	12%	22%	6%	3%	34%
Train Ride	22%	14%	16%	13%	10%	4%	20%
Ziplining	20%	12%	20%	11%	11%	9%	16%

Impact on Opinion of NH

- Like the overall reaction results, the photos that feature water and/or dramatic scenery are the most likely to have a positive impact on consumers' opinions of New Hampshire.



Appendix: Questionnaire

Questionnaire

New Hampshire Tourism
Spring/Summer Ad Effectiveness Wave 2
September 2021

SCREENER MODULE

S1. What is your postal/ZIP code? _____

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>The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your travel behavior under normal circumstances</i>		
(IF =0, TERMINATE AFTER SCREENING QUESTIONS)		
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		

S3. 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

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					

Questionnaire

IMAGE TEST MODULE

I:\Ads Master\New Hampshire\2021\Images\cultural



02a_state-house_10-21-19_001.jpg



dwp_gyk_nht_portsmouth_091819_038-3856x2572.jpg



ifwk_hanover_cornish-bridge_august-2017_001.JPG



ifwk_hanover_dartmouth-art_august-2017_003.JPG



ifwk_hanover_orozco-mural_august-2017_008.JPG



ifwk_hanover_shaker-museum_august-2017_024.JPG



ifwk_monadnock-region-foliage_central-square_10-4-17_002.JPG



ifwk_monadnock-region-foliage_stone-arch-bridge_10-4-17_010.JPG



millyard-museum_2-20-19_017.jpg



SeacoastSpring-0553-Edit-2-2915x1946.jpg

I:\Ads Master\New Hampshire\2021\Images\outdoor-recreation



DTTD_Mt-Washington-Hiking-Trail_9-9-14_245.jpg



dwp_gyk_nh_surf_620_highres-388x2592.jpg



dwp_gyk_nhdred_091515_L-30-3756x2496.jpg



dwp_gyk_nhdred_atv-6318_highres-4344x2896.jpg



dwp_gyk_nht_willard_100519_282.jpg



dwp_nh_dred_090716_147(1).jpg



dwp_nh_dred_090716_1711(1).jpg



dwp_nh_dred_090716_4272_highres-3888x2925.jpg



Kayak with a View.jpg



nh_tourism_140908_0239.jpg



nh_tourism_140908_1285-2761x1841.jpg



pawtuckaway-paddleboarding_september-2016_188-2880x1920.jpg



skiing & riding.jpg



snowmobiling.jpg



train rides.jpg



ziplining.jpg

ASK I1 AND THEN I2 FOR EACH IMAGE BEFORE MOVING ON TO NEXT IMAGE

I1. What is your overall reaction to this image?

Very unfavorable	Unfavorable	Neutral	Favorable	Very favorable
1	2	3	4	5

I2. Which state comes to mind when you see this image?

[ROTATE]	
New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

I3. These images are all from New Hampshire. How does each influence your opinion of the state?

SHOW EACH IMAGE	Makes me <i>less</i> positive	Has no impact	Makes me <i>more</i> positive

TRAVEL MODULE

T1. Have you traveled to or within any of the following states for a leisure trip in 2021? How many trips did you take to or within each state in 2021?

[ROTATE]	States visited in 2021	Number of visits in 2021
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

Questionnaire

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

T2. When in 2021 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? __

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

ASK T6 IF T5 > 0

T6. What form(s) 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 New Hampshire regions did you visit?

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 Banner

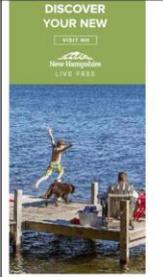
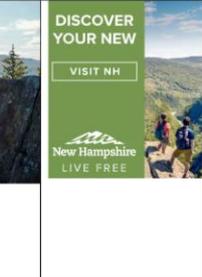
I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Display Ads\HTML5 - Animated\New England_New York_NJ

ASK IF NEW ENGLAND STATES, NY AND NJ

 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>	 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>	 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>
VisitSummerFY21_All_OpenForAdventure_300x600	VisitSummerFY21_Core_Initial_General_300x600	VisitSummerFY21_Core600Boost_Retarget_Roadtrip_300x250

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Display Ads\HTML5 - Animated\Test Markets

ASK IF PA, DE, MD, VA, NC AND OH

 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>	 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>	 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>	 <p>DISCOVER YOUR NEW VISIT NH New Hampshire LIVE FREE</p>
VisitSummerFY21_600Boost_Initial_General_300x600	VisitSummerFY21_600Boost_Initial_Roadtrip_300x600	VisitSummerFY21_600Boost_Retarget_RoadtripItinerary_300x250	VisitSummerFY21_All_OpenForAdventure_300x250

Questionnaire

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

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\TV_Pre-roll Videos



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

Yes
No

Social Ads

ASK IF S5 > 0

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Social Ads\Paid Social Videos 15s



I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Social Ads\Static Posts

ASK IF NEW ENGLAND STATES, NY AND NJ



I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Social Ads\Static Posts\Test Markets

ASK IF PA, DE, MD, VA, NC AND OH



ASK IF S5 = 1

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Social Ads\Pinterest



ASK IF S5 = 8

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Social Ads\TikToks

TIKTOK



Questionnaire

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

RADIO:

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Streaming Radio_All Markets

		
76339_S1_V1_JPerry_Memorial Day ...	76640_S1_V1_JPerry_NHDRED_Tha...	76640_S2_V1_JPerry_NHDRED_Red...
https://vimeo.com/564748548	https://vimeo.com/564748782	https://vimeo.com/564749013

ASK FOR EACH RADIO AD

Have you heard this or a similar ad before now?

- Yes
- No

OOH

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Billboards\use BOSTON AND HARTFORD ONLY

		
Boston_Lake_Family_Time_14x41	Boston_Night_Camping_14x48 1	Boston_Table_Rock_14x48

NEW HAMPSHIRE ONLY

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Billboards\New Hampshire\USE

	
NH_Table_Rock_14x48	Yankee Magazine_New England States1

NEW YORK ONLY

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Billboards\New York\USE

			
NY_Lake_14x48_Digital 1	NY_Table_Rock_14x48	NY_Lincoln Tunnel_Lakes	NY_Midtown West_Table Rock
			
NYC_SoHo_Unbeatable Nightlife			

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\Billboards\use PROVIDENCE ONLY

	
Boston_Night_Camping_14x48 1	Boston_Table_Rock_14x48

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

- Yes
- No

PRINT

I:\Ads Master\New Hampshire\2021\Summer\Summer 2021 Assets for SMARI\PRINT

			
Camping USE.jpg	Gundalow USE.jpg	Lake USE.jpg	Throwback USE.jpg

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

- Yes
- No

Questionnaire

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
- 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. What is your race/ethnicity? *Select all that apply.*
African-American/black
Asian/Pacific Islander
Caucasian/white
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify _____)
- D7. What is your preferred gender identity ...?
Male
Female
Other
Prefer not to answer