



New Hampshire

LIVE FREE

2021 Fall Advertising
Effectiveness Research

December 2021

 **insights**
Strategic Marketing and Research

Background & Objectives

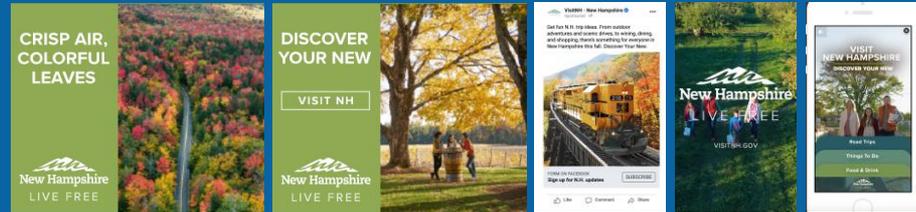
- The New Hampshire Division of Travel and Tourism Development (the Division) ran fall advertising in 2021 in existing northeastern U.S. target markets and in newer/more distant expansion markets.
- The Division has partnered with Strategic Marketing & Research Insights (SMARInsights) to assess the effectiveness of the fall 2021 advertising.
- This research is specifically designed to measure the impact of the fall 2021 effort on travel and spending. The objectives of this seasonal advertising effectiveness research include the following:
 - Measure awareness of the fall 2021 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 travel;
 - Quantify ad-influenced trips, visitor spending, and ROI;
 - Explore the results by existing and expansion market groups;
 - Evaluate a group of New Hampshire cultural photos in terms of overall reaction, association with New Hampshire, and impact on opinion of New Hampshire; 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. 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 fall 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 1,703 surveys were completed in November 2021. 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
Existing Target Markets	New Hampshire	100
	Connecticut	100
	Massachusetts	200
	Rhode Island	100
	Maine	100
	New York	201
	New Jersey	201
Expansion Markets	Pennsylvania	200
	Delaware	101
	Maryland	100
	Virginia	100
	North Carolina	100
	Ohio	100
	Total	1,703

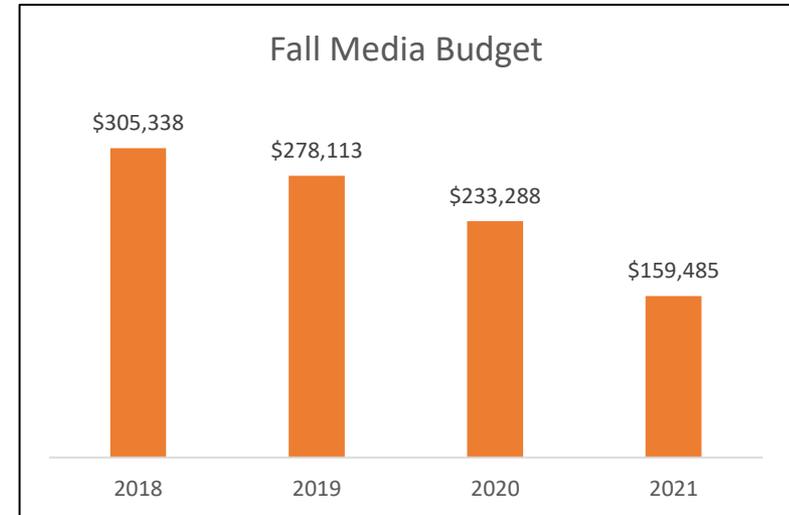
Fall Campaign Overview



Market	Display	Social	Total
New Hampshire	\$6,117	\$4,623	\$10,739
Connecticut	\$12,233	\$8,248	\$20,481
Massachusetts	\$6,117	\$4,623	\$10,739
Rhode Island	\$12,233	\$8,248	\$20,481
Maine	\$6,117	\$4,623	\$10,739
New York	\$9,867	\$8,248	\$18,114
New Jersey	\$6,117	\$3,625	\$9,742
Pennsylvania	\$6,117	\$3,625	\$9,742
Delaware	\$6,117	\$3,625	\$9,742
Maryland	\$6,117	\$3,625	\$9,742
Virginia	\$6,117	\$3,625	\$9,742
North Carolina	\$6,117	\$3,625	\$9,742
Ohio	\$6,117	\$3,625	\$9,742
Total	\$95,500	\$63,985	\$159,485

Total Existing Target Markets = \$101,035

Total Expansion Markets = \$58,450



- The fall 2021 campaign included digital display and social media advertising.
- The media investment is quite modest at \$159,485 – and is smaller than prior fall investments.
- 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 over a year now.
- The entire collection of ads tested can be found in the questionnaire in the Appendix.

Insights: Ad Awareness and Ratings

In fall of 2021, the Division ran fall Discover Your New advertising with a modest budget in the existing and expansion markets. The Discover Your New messaging once again proved effective. Key insights from this research include:

- The advertising generated 34% awareness, reaching about 8.7 million households. This level of awareness is outstanding given the relatively small budget, but there is likely some residual awareness of prior fall and other seasonal Discover Your New advertising driving this strong result.
- Advertising awareness is lower than in 2020 (48%) when the media budget was larger, and the ads were aimed at only nearby existing target markets. But adding the expansion markets led to more ad-aware households (8.7 million vs 4.6 million) and a more efficient media buy (\$0.02 per ad-aware household vs. \$0.05 per ad-aware household).
- The advertising achieves top 10% ratings relative to industry benchmarks in both market groups for communicating *where I would feel free-spirited* and *where I could uncover new places or things*.
- The advertising is less effective at communicating *where I would be challenged to live life to the fullest*. The below average rating for communicating this message is in line with prior fall campaigns. The spring/summer ads tend to do better in this regard; the fall ads are more laid back in their execution.
- The ads are more effective at communicating *where I would feel free-spirited* among younger generations and are more effective at communicating *where I could uncover new places or things* among older generations.

Insights: Ad Impact and ROI

- The advertising has a positive impact on top-of-mind consideration, familiarity with the New Hampshire leisure travel product, and preference for the state in both the existing and expansion markets.
- The advertising ultimately influenced New Hampshire fall leisure travel from both market groups. The impact is greater in the existing target markets than in the expansion markets, which is the expected result given that travel during the pandemic has tended to occur closer to home. This is especially true for fall travel, which tends to produce shorter “getaway” trips.
- The overall level of fall 2021 New Hampshire travel is higher than in fall 2020, which aligns with pent-up demand and a focus on outdoor-focused activities and drive trips as the pandemic continues to influence travel behaviors. The level of baseline (unaware) travel is actually above pre-pandemic levels, which suppresses the level of ad-influenced travel.
- The fall 2021 advertising ultimately influenced about 69,000 New Hampshire leisure trips – 59,000 coming from the existing target markets and 10,000 coming from the expansion markets. The nature of fall trips, which tend to be shorter and closer to home, makes it a challenge to influence fall travel from the expansion markets.
- The fall 2021 advertising influenced about \$68 million in revenue, generating an ROI of \$426 for each \$1 invested in the media buy. The advertising generated a positive ROI in both market groups, but the existing markets stand out for having a stronger ROI (\$578) than the expansion markets (\$163).
- The fall 2021 advertising produced a higher ROI than the fall 2020 advertising (\$286) but falls short of the pre-pandemic 2019 ROI (\$664).

Insights: Photo Test

- Some photos clearly resonate more strongly than others based on overall reaction, association with New Hampshire, and impact on perceptions of the state.
- The top photos show either dramatic outdoor scenery, charming New England architecture, or water. The bottom photos show nondescript buildings or niche appeal activities and attractions.

Top Photos

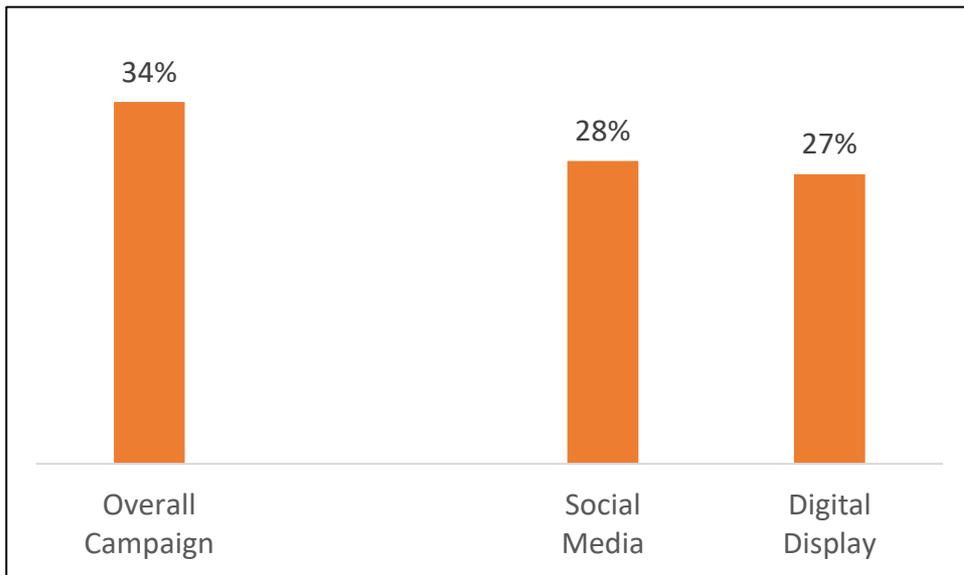


Bottom Photos



Ad Awareness

2021 Fall Ad Awareness Overall and by Medium

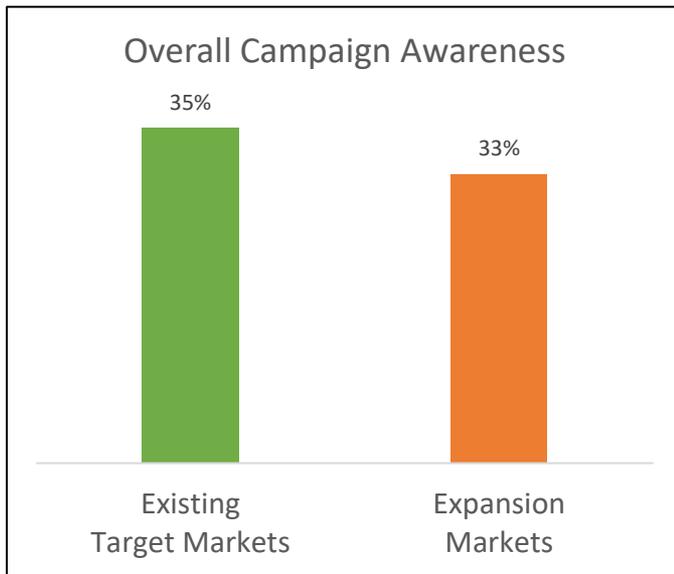


Target HHs	25,578,115
Ad Awareness	34%
Ad-Aware HHs	8,656,969
Media Investment	\$159,485
Cost per Aware HH	\$0.02



- The fall 2021 Discover Your New advertising generated 34% awareness, reaching 8.7 million households.
- With an investment of \$159,485, the cost per aware household is just \$0.02. While this indicates a remarkably efficient media buy, 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 nearly \$4 million. And adding the expansion markets has led to gains in efficiency (see next slide).

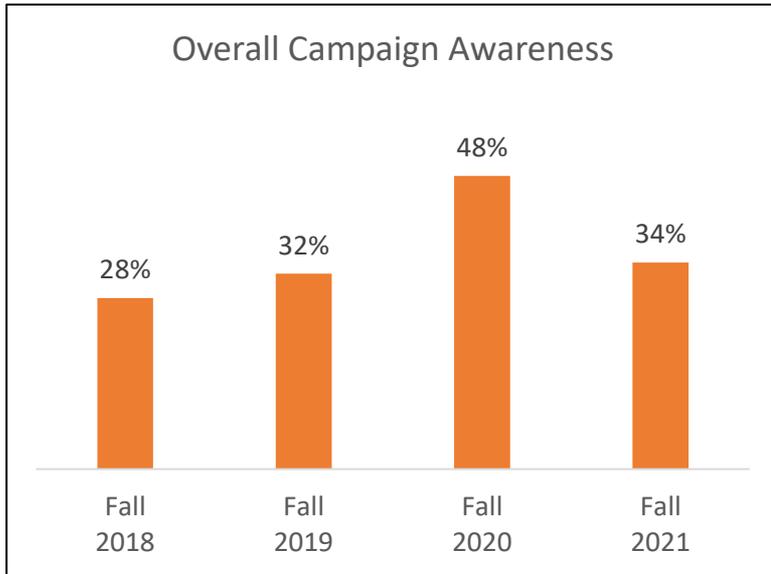
2021 Fall Ad Awareness by Market Group



	Existing Target Markets	Expansion Markets
Target HHs	11,596,683	13,981,432
Ad Awareness	35%	33%
Ad-Aware HHs	4,055,449	4,601,519
Media Investment	\$101,035	\$58,450
Cost per Aware HH	\$0.02	\$0.01

- Ad awareness is higher in the existing markets than in the expansion markets, but the expansion markets are more populous and account for over half of the ad-aware households – and have a lower cost per aware household.

Fall Ad Awareness Compared to Recent Years

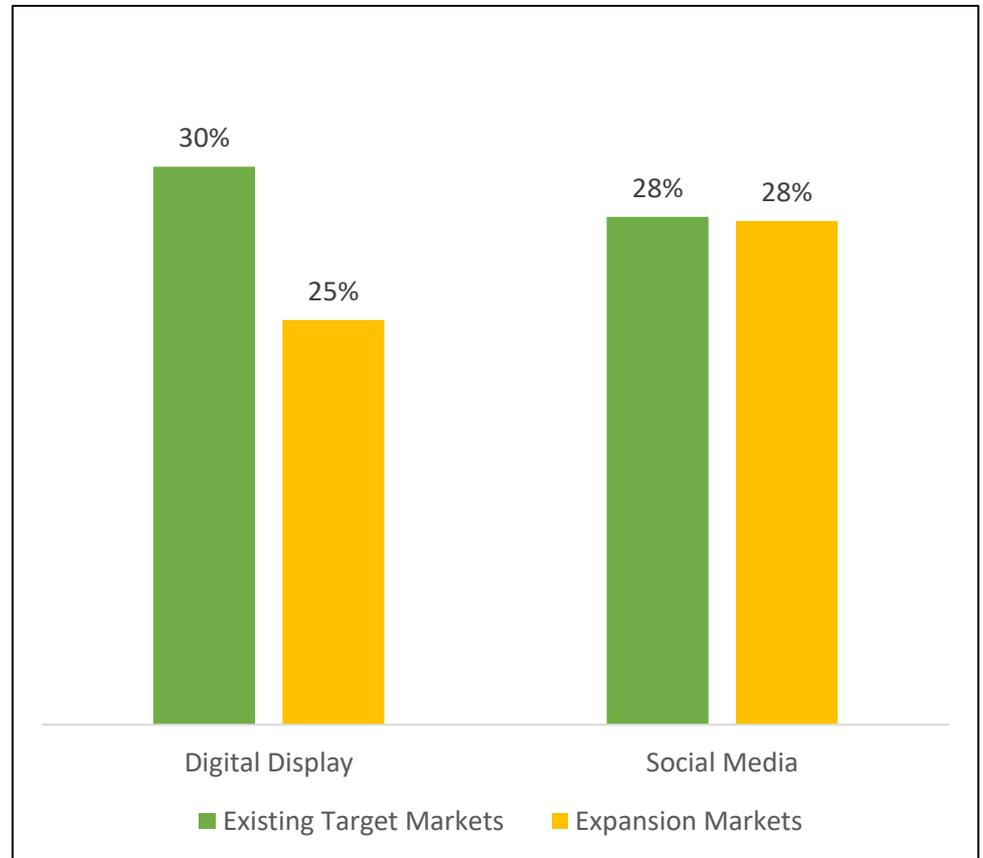


	Fall 2018	Fall 2019	Fall 2020	Fall 2021
Target HHs	18,270,009	19,205,673	9,612,930	25,578,115
Ad Awareness	28%	32%	48%	34%
Ad-Aware HHs	5,185,047	6,150,380	4,641,103	8,656,969
Media Investment	\$305,338	\$278,113	\$233,288	\$159,485
Cost per Aware HH	\$0.06	\$0.05	\$0.05	\$0.02

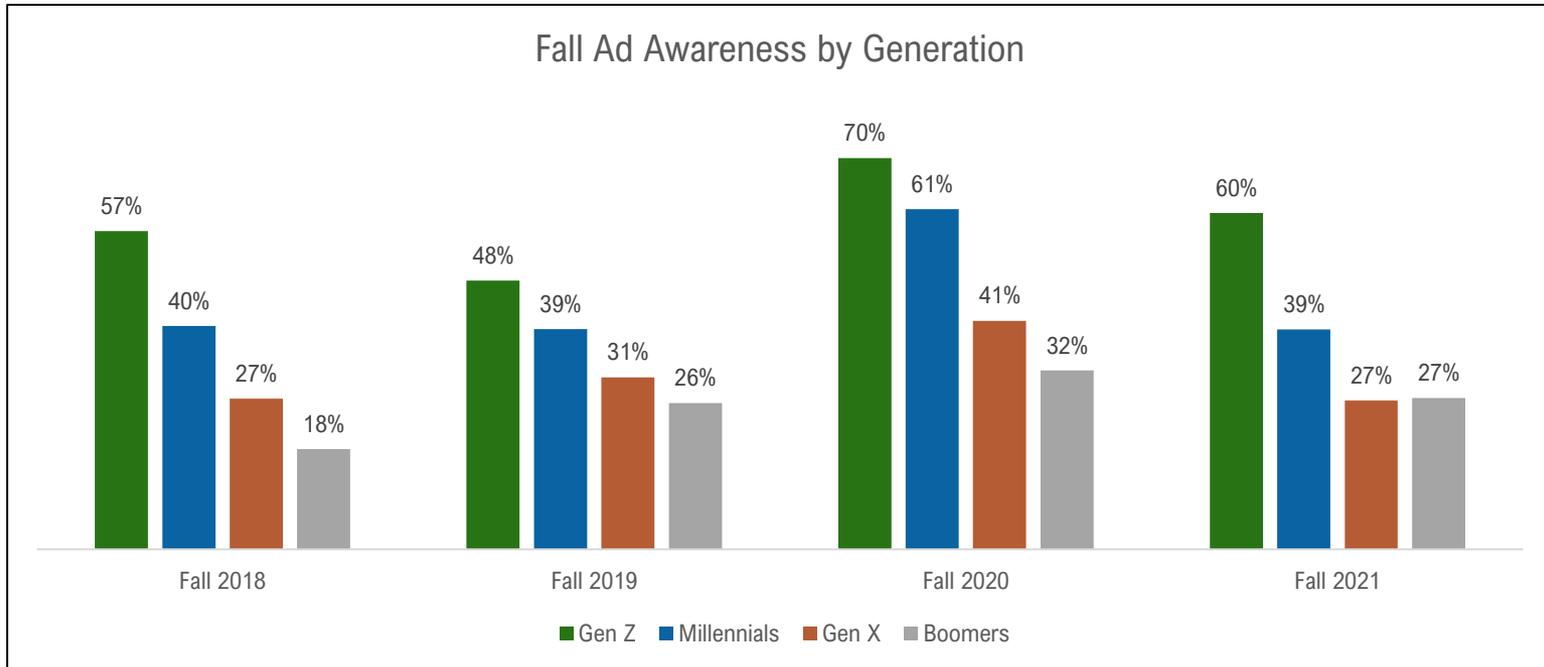
- The level of fall ad awareness is down compared to 2020, but adding the expansion markets led to the most ad-aware households and the lowest cost per aware household recorded over the past four years.

Fall Awareness by Medium by Market Group

- Awareness of the digital display ads is higher in the existing target markets than in the expansion markets, but awareness of the social media ads is the same in both market groups.



Fall Ad Awareness by Generation

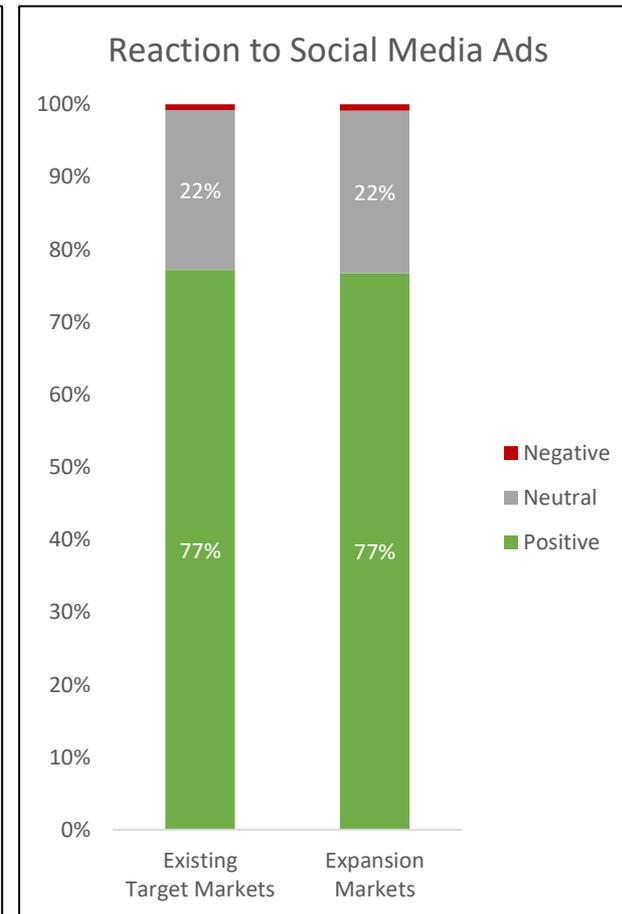
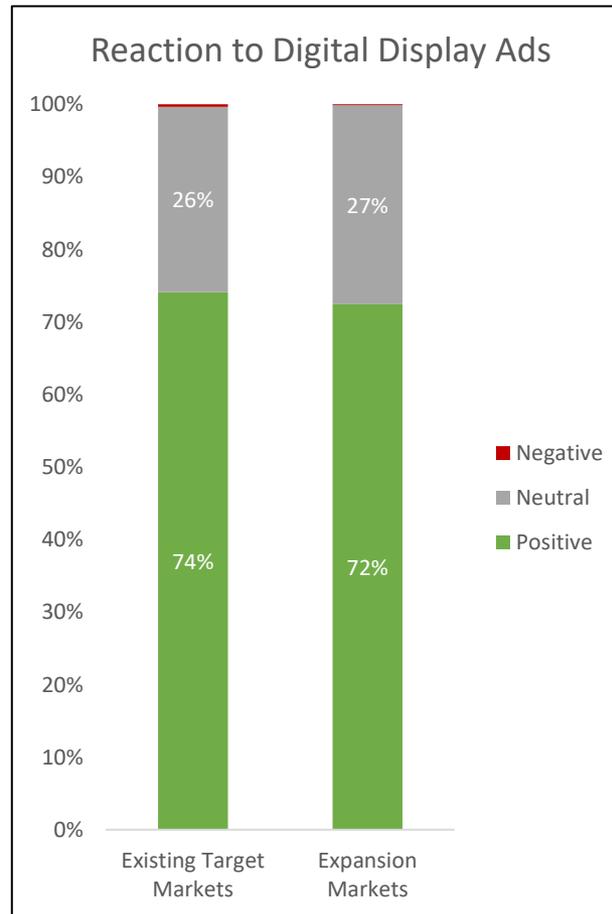


- Advertising awareness continues to be higher among younger consumers due to the digital orientation of the media buy. This result should, of course, also be interpreted considering demographic targeting strategy.

Creative Ratings

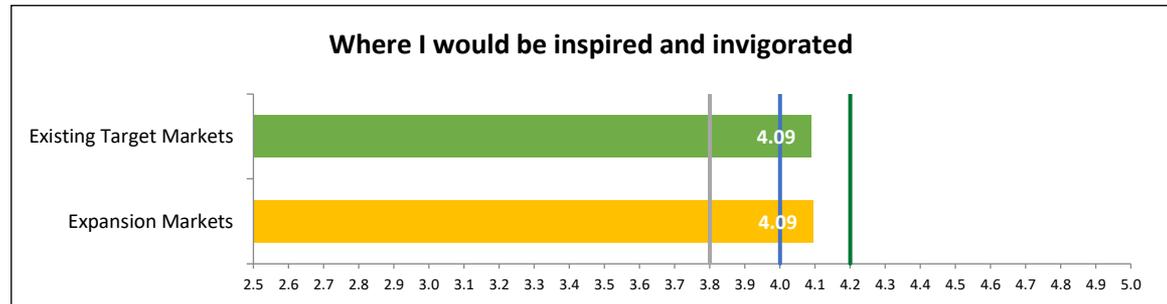
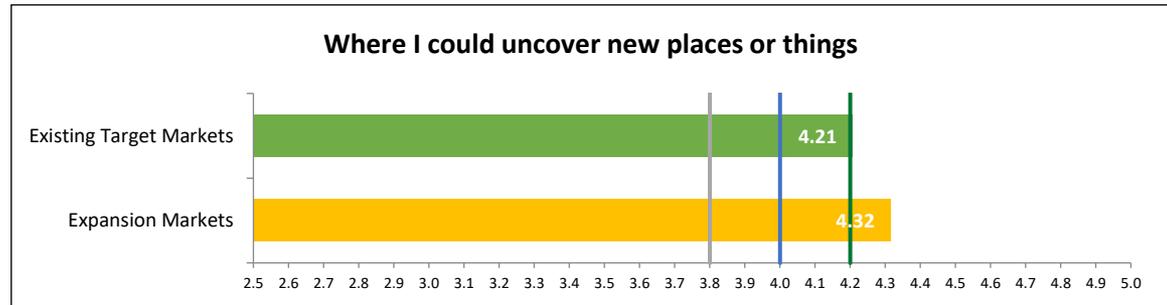
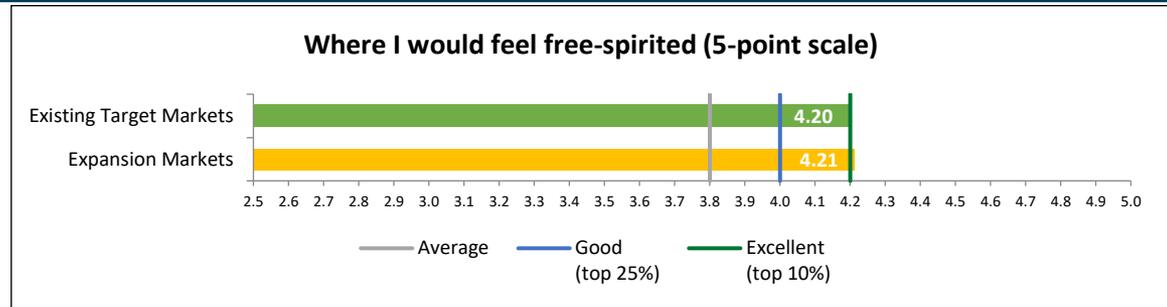
Overall Reaction to Fall 2021 Ads

- Around three-quarters of consumers have a positive reaction to the fall 2021 digital display and social media ads.
- The social ads, which include video, get a slightly higher proportion of positive responses.
- There is basically no negative reaction to the ads.



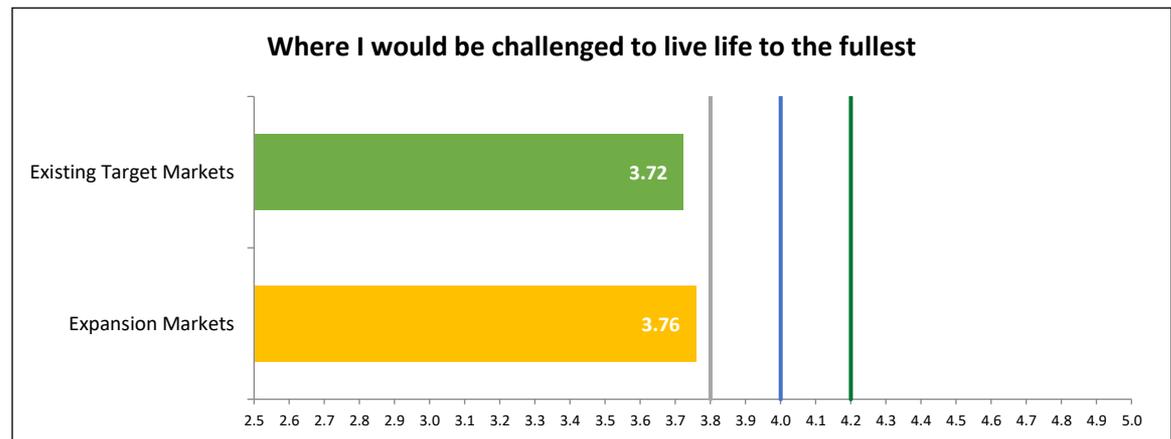
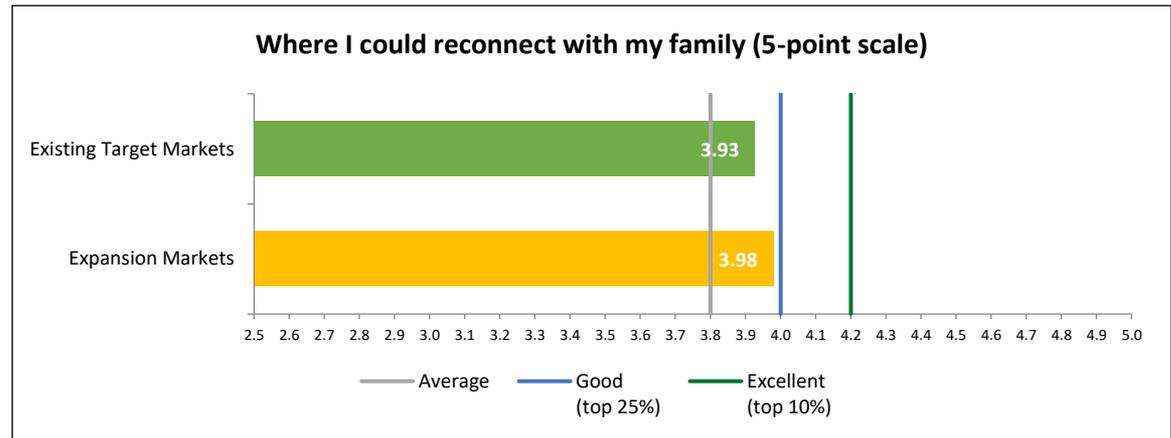
Fall 2021 Communication Attributes

- The fall 2021 advertising is effectively communicating the intended messages.
- The advertising is “excellent” from an industry benchmarking standpoint in both market groups for communicating *where I would feel free-spirited* and *where I could uncover new places or things*.
- The ads are good at communicating *where I would be inspired and invigorated*.



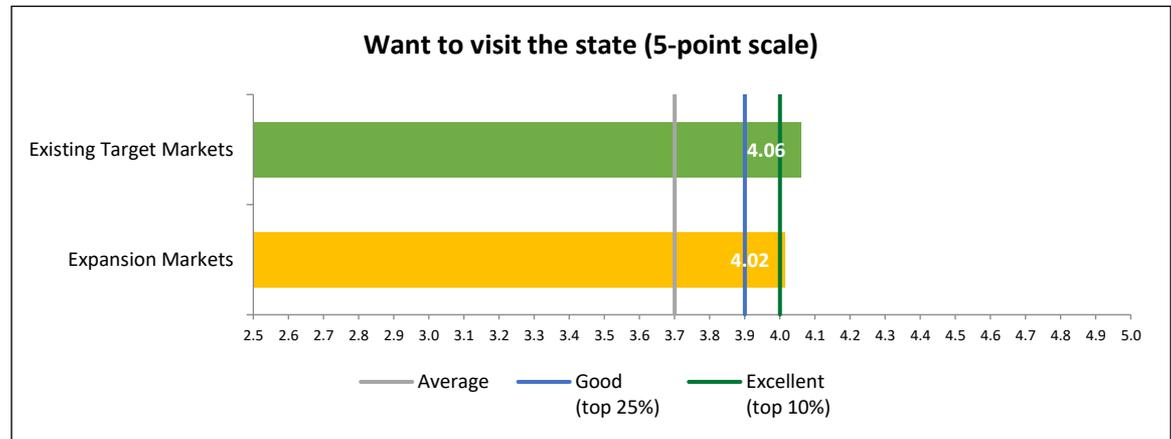
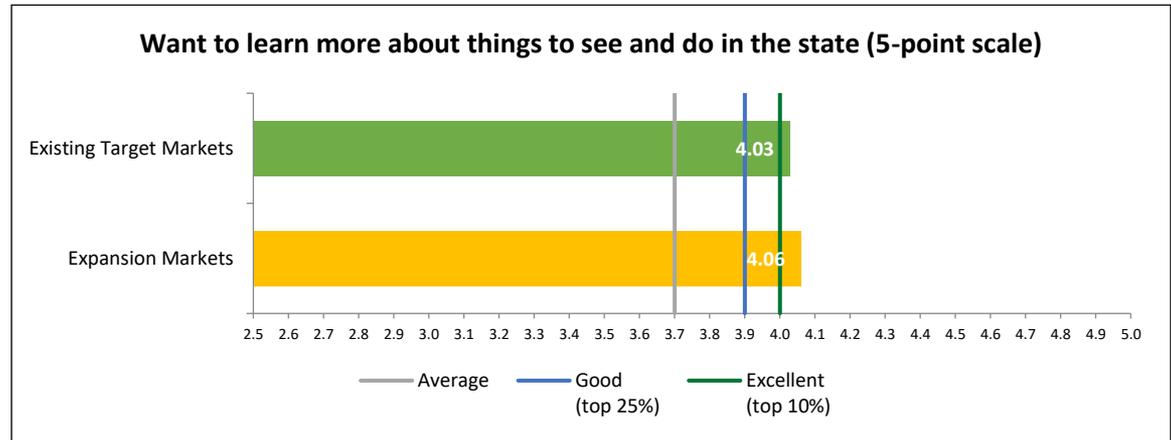
Fall 2021 Communication Attributes cont.

- The fall 2021 advertising is less effective from an industry benchmarking standpoint at communicating *where I could reconnect with my family* and *where I would be challenged to live life to the fullest*.
- The below average rating for *challenged to live life to the fullest* is in line with prior fall campaigns (shown later). The spring/summer ads tend to do better in this regard; the fall ads are more laid back in their execution.



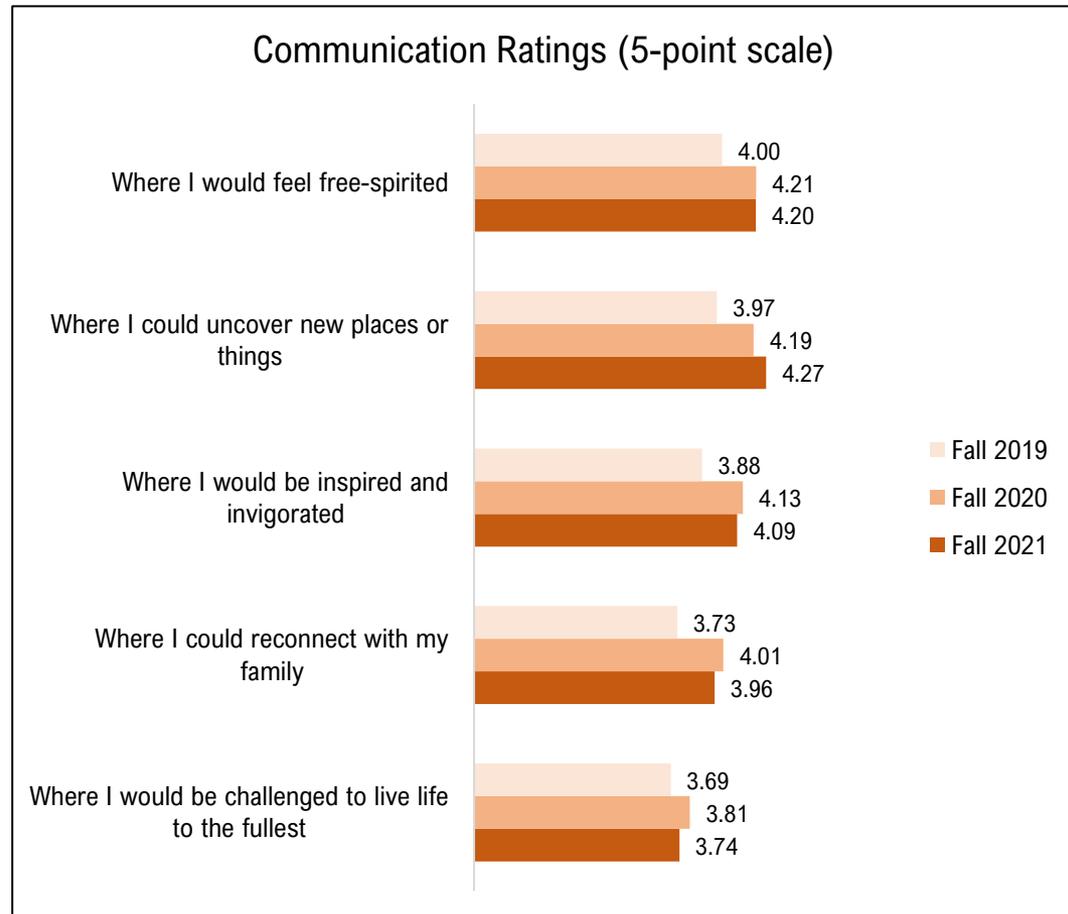
Fall 2021 Impact Attributes

- From an evaluative ratings standpoint, the fall 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.



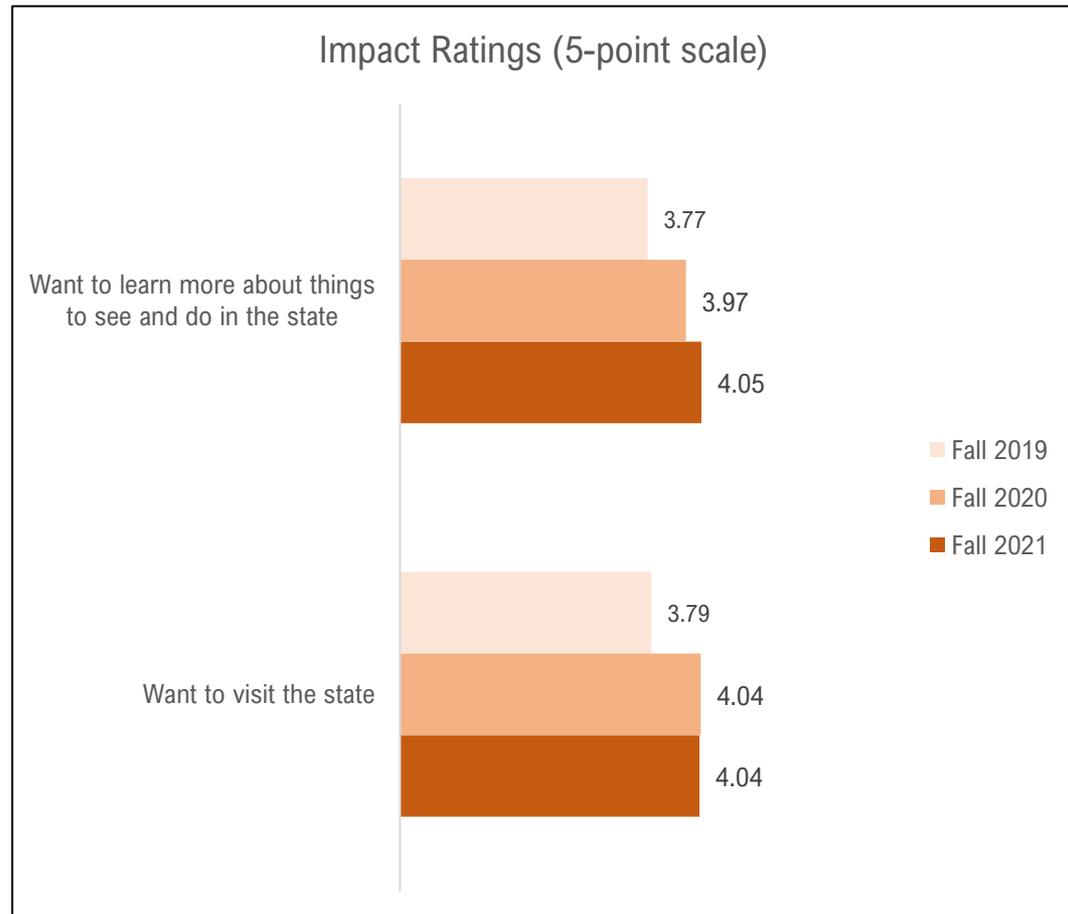
Communication Ratings Change

- The Discover Your New fall advertising (2020 and 2021) continues generate stronger ratings than the prior fall advertising (2019).
- The fall 2021 ads are the strongest of the past three fall campaigns at communicating *where I could uncover new places or things*.
- As noted, the fall ads consistently struggle to communicate *where I would be challenged to live life to the fullest*. But again, this does not seem to be a primary goal of these more laid-back ads.



Impact Ratings Change

- Like the communication ratings, the Discover Your New impact ratings are stronger than the impact ratings garnered by the prior campaigns.



Fall 2021 Campaign Ratings by Generation

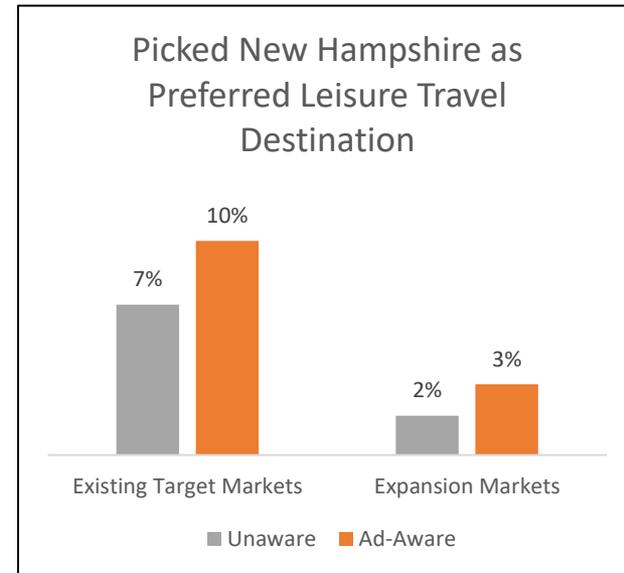
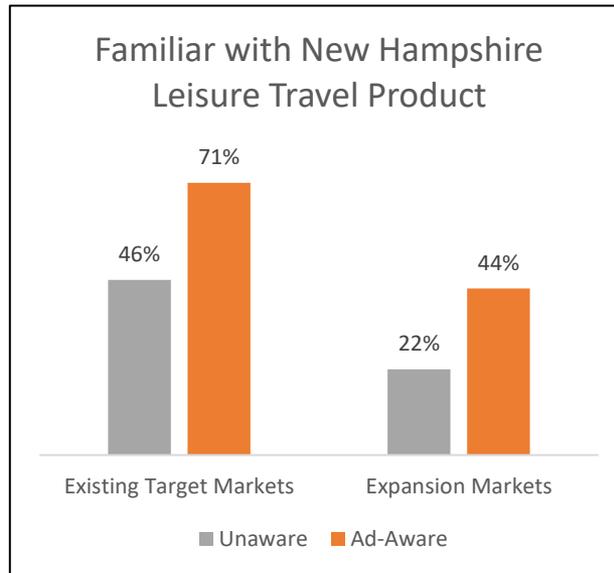
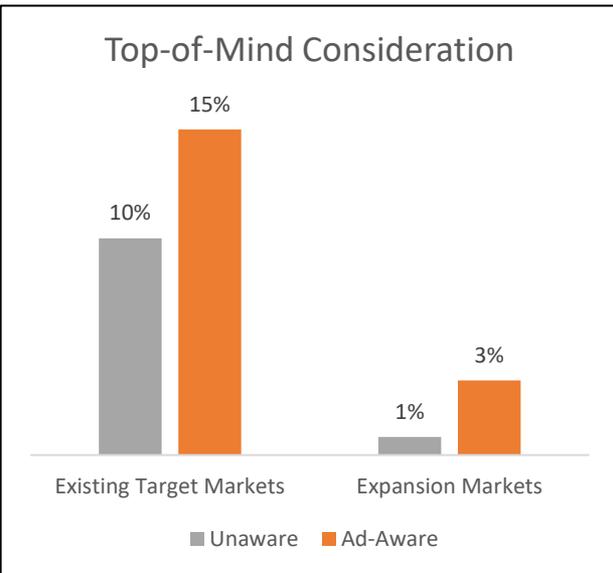
Top 10% Benchmark Range
Top 25% Benchmark Range
Above Average Benchmark Range
Below Average Benchmark Range

Communication Ratings	Gen Z	Millennials	Gen X	Boomers
Where I would be inspired and invigorated	3.96	4.12	4.07	4.11
Where I could reconnect with my family	3.76	4.04	3.93	3.89
Where I would feel free-spirited	4.24	4.24	4.15	4.18
Where I would be challenged to live life to the fullest	3.54	3.78	3.74	3.75
Where I could uncover new places or things	4.18	4.30	4.22	4.31
Impact Ratings	Gen Z	Millennials	Gen X	Boomers
Want to learn more about things to see and do in the state	4.02	4.13	3.99	3.96
Want to visit the state	3.93	4.12	4.02	3.89

- There are some differences in ad ratings across generations. Namely, the ads are more effective at communicating *where I would feel free-spirited* among the younger generations and are more effective at communicating *where I could uncover new places or things* among the older generations.

Advertising Impact

Ad Impact On Top of Mind, Familiarity, and Preference



- The fall 2021 advertising has a positive impact on top-of-mind consideration, familiarity with the New Hampshire leisure travel product, and preference for the state in both market groups.

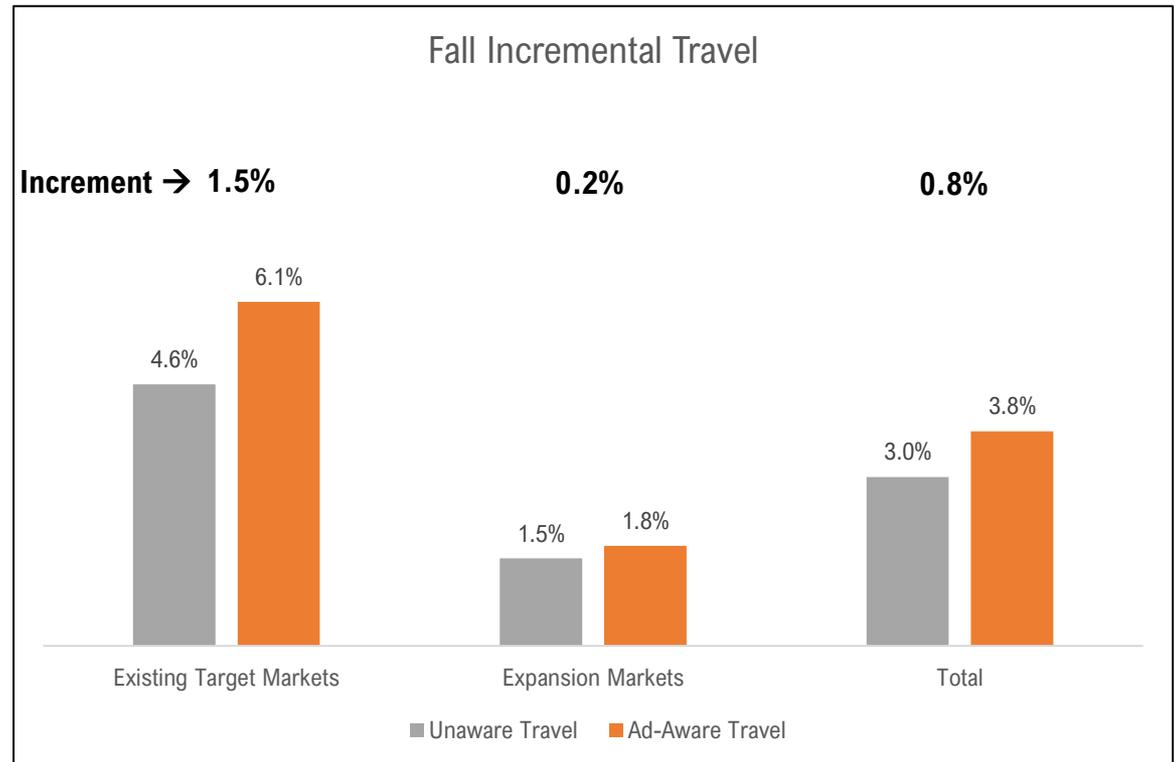
Incremental Travel Review

- 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 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 2021 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 2021 through September 2021. Accounting for travel in only October and November in this fall wave precludes double-counting.



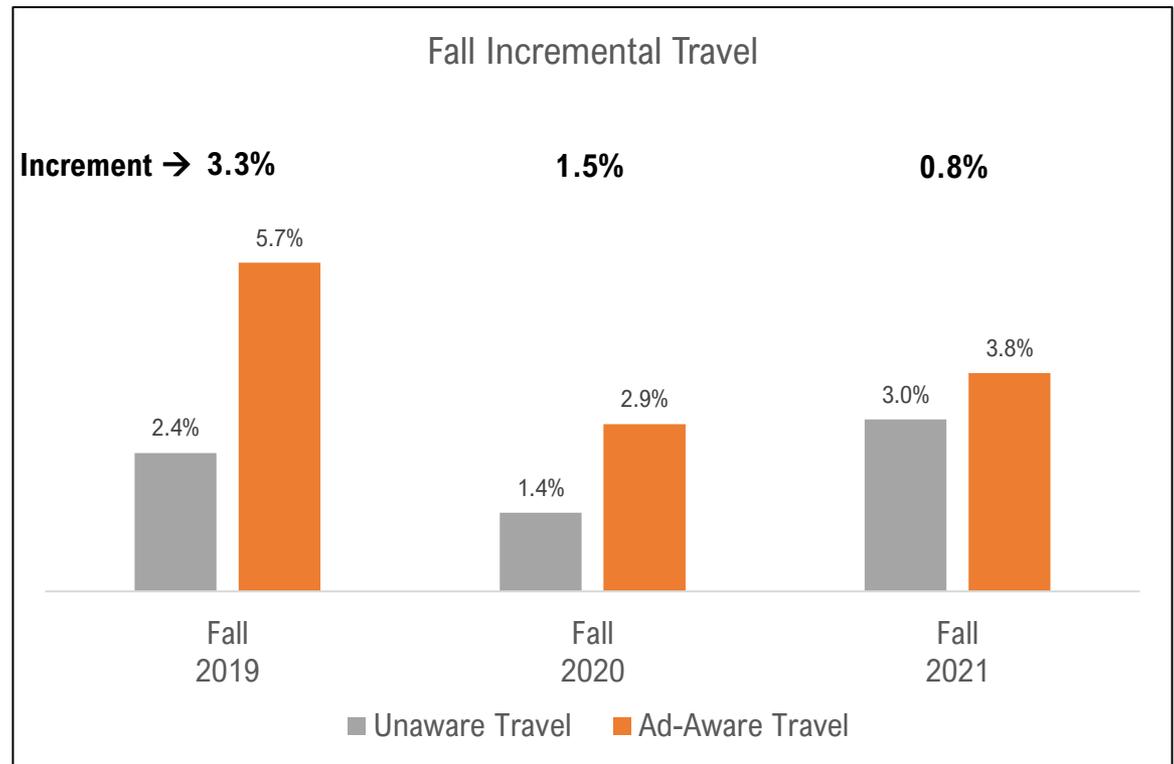
Fall 2021 Incremental Travel

- The fall 2021 advertising influenced New Hampshire leisure travel from both market groups.
- The level of ad 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 (especially for short fall getaway trips).



Tracking Fall Incremental Travel

- The level of baseline (unaware) travel is higher than in fall 2020, which suppresses the level of ad-influenced travel. In fact, the level of baseline travel is above pre-pandemic levels.
- The growth in fall travel aligns with pent-up demand and a focus on outdoor-focused and drive trips as the pandemic continues to influence travel behaviors.



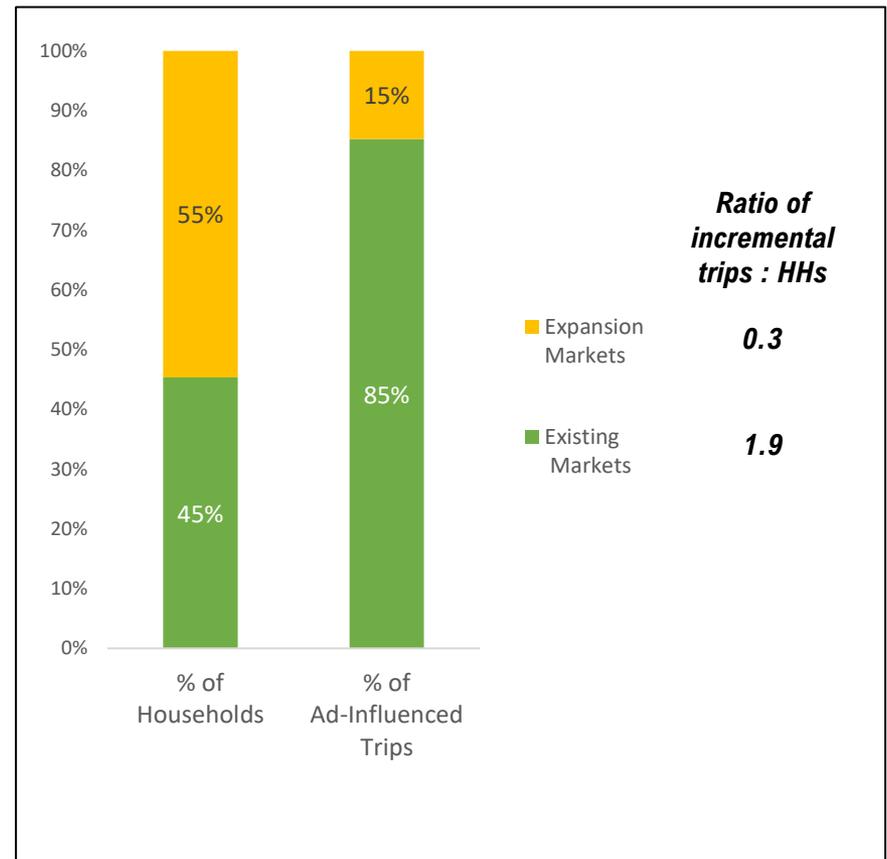
Fall 2021 Ad-Influenced Trips

	Existing Target Markets	Expansion Markets	Total
Target HHs	11,596,683	13,981,432	25,578,115
Ad Awareness	35%	33%	34%
Ad-Aware HHs	4,055,449	4,601,519	8,656,969
Incremental Travel	1.5%	0.2%	0.8%
Incremental Trips	59,222	10,254	69,476

- Overall, the fall 2021 advertising influenced about 69,000 New Hampshire leisure trips.
- Again, the ads were more impactful in the existing markets.

Fall 2021 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 existing markets becomes even more clear when we see that they account for 45% of households and 85% of ad-influenced trips.
- The expansion markets account for 55% of households and 15% of ad-influenced trips. In spring/summer 2021, the expansion markets accounted for 55% of households and 29% of ad-influenced trips (performance ratio of 0.5). It makes sense that the expansion 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

- The quantity of ad-influenced fall trips in 2021 is basically the same as in fall 2020 despite lower ad awareness and a lower level of ad-influenced travel. Strong performance in the existing markets and some impact in the expansion markets drove this result.

	Fall 2019	Fall 2020	Fall 2021	% Change
Target HHs	19,205,673	9,612,930	25,578,115	166%
Ad Awareness	32%	48%	34%	-29%
Ad-Aware HHs	6,150,380	4,641,103	8,656,969	87%
Incremental Travel	3.3%	1.5%	0.8%	-47%
Incremental Trips	204,124	71,415	69,476	-3%

Fall 2021 ROI

	Existing Target Markets	Expansion Markets	Total
Incremental Trips	59,222	10,254	69,476
Avg. Trip Spending (among ad-aware visitors)	\$985	\$929	\$977
Ad-Influenced Trip Spending	\$58,358,063	\$9,529,518	\$67,887,580
Media Investment	\$101,035	\$58,450	\$159,485
ROI	\$578	\$163	\$426

- With average trip spending of \$977, the fall 2021 advertising influenced about \$68 million in revenue.
- This means an ROI of \$426 for each \$1 invested in the media buy.
- The advertising generated a positive ROI in both market groups, although the existing markets stand out for having a relatively strong ROI.

Fall 2021 Tax ROI

	Existing Target Markets	Expansion Markets	Total
Incremental Trips	59,222	10,254	69,476
Avg. Taxable Trip Spending (among ad-aware visitors)	\$716	\$442	\$675
Ad-Influenced Taxable Trip Spending	\$42,383,326	\$4,527,908	\$46,911,234
Taxes Generated (8.5% tax rate)	\$3,602,583	\$384,872	\$3,987,455
Media Investment	\$101,035	\$58,450	\$159,485
Tax ROI	\$35.66	\$6.58	\$25.00

- 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 2021 advertising generated \$4.0 million in taxes. Given media spending, the ads returned \$25 in tax revenue for each \$1 invested.

Fall ROI Tracking

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

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

- The fall 2021 advertising produced a higher ROI than the fall 2020 advertising but falls short of the pre-pandemic (2019) ROI.

Fall Trip Specifics

This section includes a review of fall 2021 trip activities, travel party make-up, spending, and lodging – and highlights changes compared to prior years.

Fall Trip Specifics Tracking

It should be noted that fall trips are shorter than spring/summer trips. Spring/summer 2021 trips from the existing markets were 3.0 nights on average; trips from the expansion markets were 5.1 nights on average.

- In fall 2021, there were some notable differences between existing target market and expansion market visitors.
- Namely, expansion market visitors stay longer, have larger travel parties, are more likely to bring kids, have higher overall trip spending, and are more likely to stay in an Airbnb.

Trip Specifics	Fall 2019	Fall 2020	Fall 2021 Existing Markets	Fall 2021 Expansion Markets
Nights in New Hampshire	2.5	2.5	2.6	3.1
People in your travel party	3.1	2.7	2.9	3.2
Kids on trip	34%	25%	38%	50%
Overall average spending	\$774	\$834	\$912	\$991
Per person/per day spending	\$100	\$121	\$123	\$98
Lodging				
Camping/RVing	9%	14%	9%	9%
Luxury resort hotel	7%	12%	11%	10%
Mid-level hotel	27%	30%	24%	21%
Vacation home	7%	9%	10%	5%
Budget hotel or motel	9%	10%	7%	5%
Home of family or friends	26%	28%	25%	43%
High-end full-service hotel	9%	9%	4%	6%
Airbnb	13%	12%	21%	29%
Bed and breakfast/Inn	13%	10%	14%	16%

Fall Trip Activities by Market Group

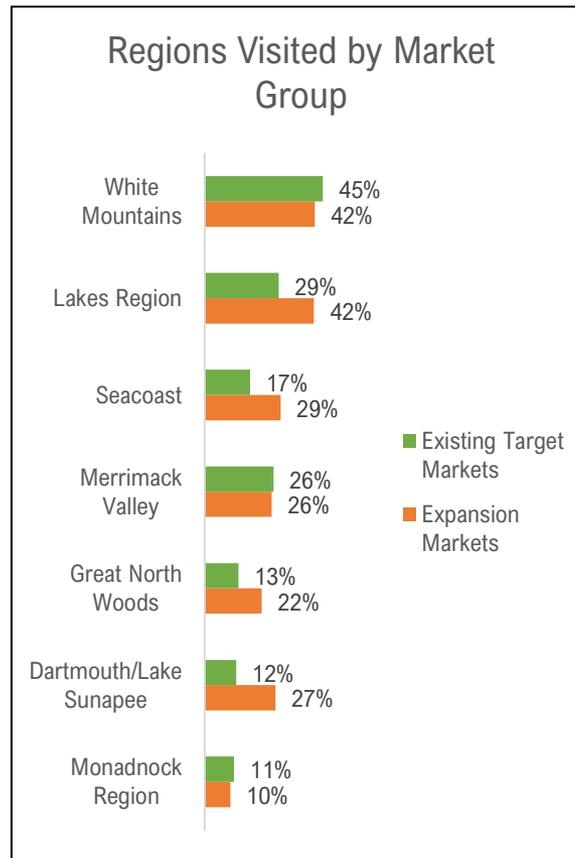
Statistically significant difference across groups

- The top New Hampshire trip activities in fall 2021 are scenic drives, local dining, shopping, parks, hiking, wildlife watching, and breweries.
- The visitors from the expansion markets are more likely than those from the closer-in existing markets to participate in some activities, as indicated by green highlighting in the table.

Trip Activity	Existing Target Markets	Expansion Markets
Scenic drive	53%	41%
Dining at locally owned restaurants	48%	30%
Shopping	37%	45%
Visiting a state or national park	25%	30%
Hiking or backpacking	23%	23%
Wildlife watching	21%	37%
Brewery	21%	39%
Sightseeing tour	18%	55%
Visiting historical sites	17%	36%
Farmer's markets / U-picks / roadside stand	17%	21%
Camping	15%	10%
Canoeing or kayaking	14%	14%
Bird watching	13%	17%
Visiting museums	11%	28%
Horseback riding	10%	9%
Winery tours	10%	23%
Fishing	9%	20%
Bicycling or mountain biking	9%	13%
Attending a play or concert	9%	18%
Boating	9%	5%
Attending a festival or fair	8%	19%
Attending performing arts (music / theater)	7%	22%
Visiting a noteworthy bar or nightclub	7%	13%
Hunting	6%	0%
Farm to table dinner	5%	15%
Rock climbing	5%	9%
Snow skiing or snowboarding	5%	6%
Golfing	4%	6%
ATVing	3%	9%

Regions Visited

- In fall of 2021, expansion market visitors were more likely than existing target market visitors to go to the Lakes, Seacoast, Great North Woods, and Dartmouth regions.
- Expansion market visitors went to 2.0 regions on average; existing target market visitors went to 1.5 regions on average.



New Hampshire Photo Test

This section includes overall reaction to, state associated with, and impact on opinion of New Hampshire of several photos. The photos tested in this research wave showcase New Hampshire's cultural attractions. The inventory of photos tested is provided on the next slide.

Photos Tested



Bethlehem Colonial



Currier Museum



Dartmouth



League of NH Craftsmen Fair



Meredith Sculpture Walk



New London Barn 1



New London Barn 2



New London Barn



NH Music Festival



NH Theatre Project



North Country Center for the Arts



Opera North



Portsmouth



Prescott Park Arts Festival



Revels North



Tupelo Music Hall



Weathervane Theatre 2



Weathervane Theatre



Winnepesaukee Playhouse

Overall Reaction

- Opera North, which shows beautiful mountain scenery, is the top-rated photo.
- Generally, the top photos show either dramatic outdoor scenery, charming New England architecture, or water.
- The bottom-rated photos show nondescript buildings or niche appeal activities and attractions.

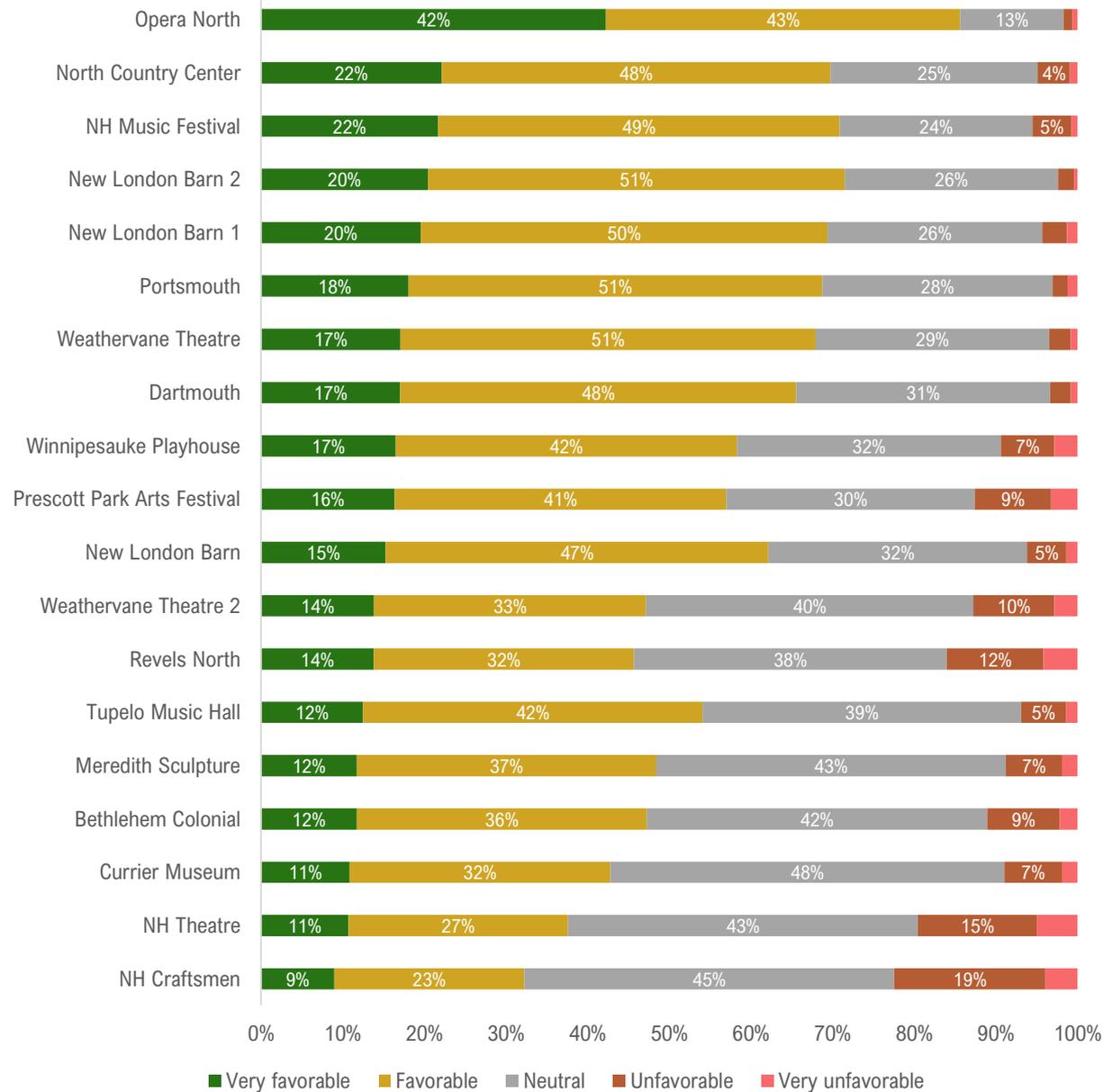
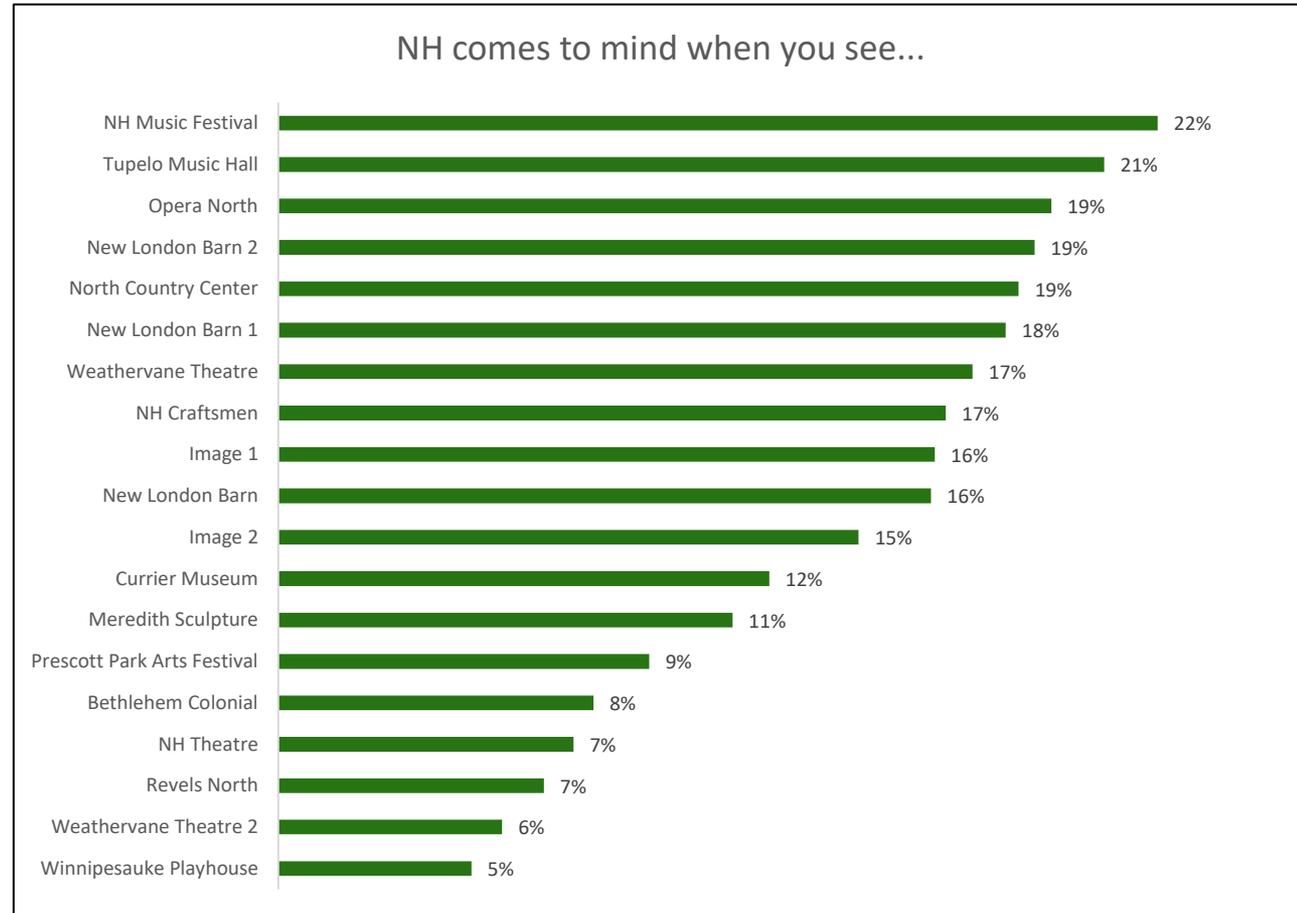


Photo Association with NH

- Outdoor music/festivals, mountains, and charming New England architecture are most likely to be associated with New Hampshire.
- But a high of 22% association suggests a lack of truly iconic imagery (of the photos tested).



What State Comes to Mind?

- The results of this exercise suggest that in the competitive context New Hampshire is seen as a place with outdoor music/festivals, mountains, and charming New England architecture. And Vermont has a very similar image.
- New York is arts and culture, and Massachusetts is old architecture.

	NH	CT	NY	ME	MA	RI	VT
NH Music Festival	22%	8%	10%	21%	12%	21%	6%
Tupelo Music Hall	21%	12%	8%	12%	15%	13%	19%
Opera North	19%	7%	11%	16%	7%	6%	33%
New London Barn 2	19%	20%	4%	15%	11%	9%	22%
North Country Center	19%	11%	11%	13%	11%	10%	26%
New London Barn 1	18%	12%	4%	19%	10%	9%	28%
Weathervane Theatre	17%	13%	4%	15%	16%	12%	22%
NH Craftsmen	17%	19%	14%	10%	12%	13%	16%
Dartmouth	16%	15%	8%	8%	31%	9%	13%
New London Barn	16%	16%	11%	14%	12%	16%	15%
Portsmouth	15%	17%	9%	7%	31%	8%	13%
Currier Museum	12%	23%	14%	9%	18%	14%	10%
Meredith Sculpture	11%	14%	15%	17%	13%	19%	11%
Prescott Park Arts Festival	9%	11%	28%	11%	17%	18%	6%
Bethlehem Colonial	8%	9%	57%	5%	10%	6%	5%
NH Theatre	7%	8%	57%	5%	10%	6%	8%
Revels North	7%	5%	61%	7%	9%	4%	7%
Weathervane Theatre 2	6%	6%	67%	3%	7%	5%	5%
Winnepesaukee Playhouse	5%	5%	70%	3%	7%	5%	4%

Impact on Opinion of NH

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

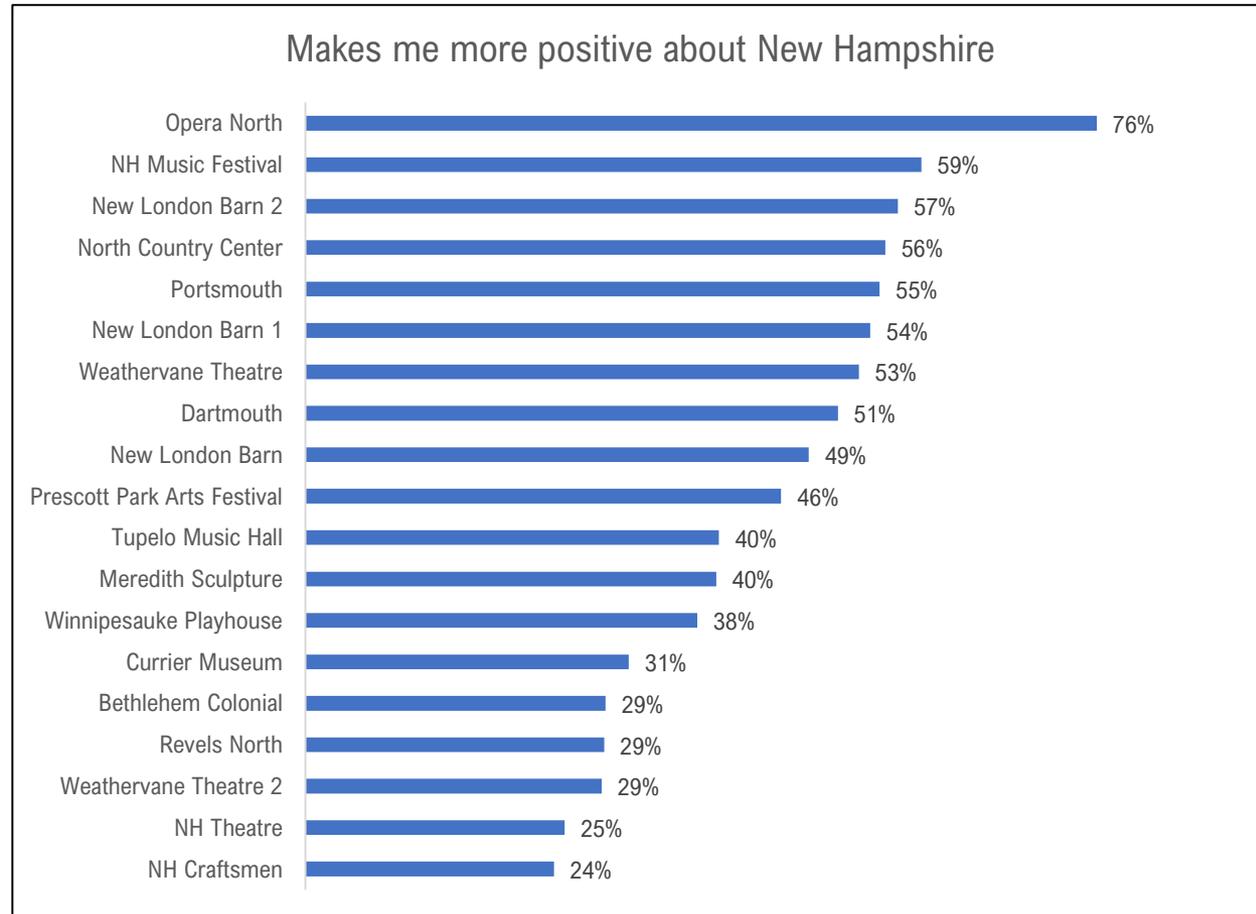


Photo Results Summary

Above Average Across Photos

Average Across Photos

Below Average Across Photos

- In summary, some photos clearly resonate more strongly than others based on overall reaction, association with New Hampshire, and impact on perceptions of the state.
- The top photos show either dramatic outdoor scenery, charming New England architecture, or water. The bottom photos show nondescript buildings or niche appeal activities and attractions.
- The following slides include the top and bottom rated photos from this and the prior research wave to highlight what consistently resonates/does not resonate.

Image	Favorable Reaction	New Hampshire Comes to Mind When Viewing Photo	Makes Me More Positive about New Hampshire
Opera North	86%	19%	76%
New London Barn 2	72%	19%	57%
NH Music Festival	71%	22%	59%
North Country Center	70%	19%	56%
New London Barn 1	69%	18%	54%
Portsmouth	69%	16%	55%
Weathervane Theatre	68%	17%	53%
Dartmouth	66%	15%	51%
New London Barn	62%	16%	49%
Winnepesaukee Playhouse	58%	5%	38%
Prescott Park Arts Festival	57%	9%	46%
Tupelo Music Hall	54%	21%	40%
Meredith Sculpture	48%	11%	40%
Bethlehem Colonial	47%	8%	29%
Weathervane Theatre 2	47%	6%	29%
Revels North	46%	7%	29%
Currier Museum	43%	12%	31%
NH Theatre	38%	7%	25%
NH Craftsmen	32%	17%	24%

Top/Bottom Photos Fall 2021

Top Photos



Bottom Photos



Top/Bottom Photos Spring/Summer 2021

Top Photos



Bottom Photos



Appendix: Agritourism

Agritourism

New to the 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.

The prior spring/summer research evaluated the March – September 2021 period. This fall research evaluates the October – November 2021 time frame.

Agritourism Activity/Attraction Categories

Farm tours

Farm-based lodging

Corn mazes or haunted forests

Petting farms

Pick-your-own

Winery / vineyard

Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides

Farmers markets

Rural wedding

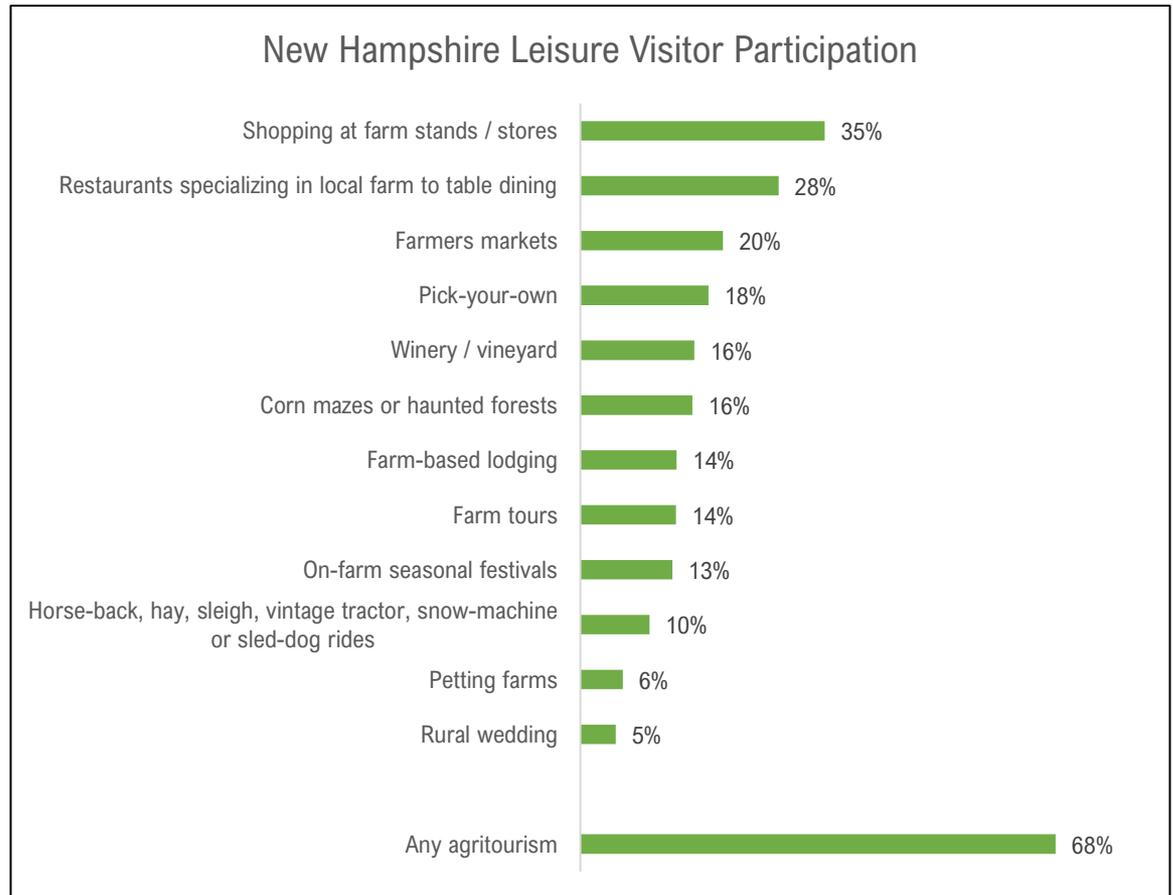
On-farm seasonal festivals

Restaurants specializing in local farm to table dining

Shopping at farm stands / stores

Fall 2021 Participation and Spending

- Just over two-thirds of fall 2021 New Hampshire leisure visitors indicate that they participated in agritourism.
- Farm stores and farm to table dining are the top agritourism attractions.
- On average, visitors who participated in agritourism spent \$171 on these attractions/activities.



Appendix: Questionnaire

Questionnaire

**New Hampshire Tourism
Fall Ad Awareness and ROI
October 2021**

SCREENER MODULE

ZIP. What is your ZIP code? _____

S1. 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

S2. Please indicate if each of the following applies to you...

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	<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	<input type="checkbox"/>	<input type="checkbox"/>
<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 am currently planning or have already planned an upcoming leisure trip		
I use video streaming services like Hulu or Netflix	<input type="checkbox"/>	<input type="checkbox"/>
I engage in skiing, snowboarding, and/or other winter activities	<input type="checkbox"/>	<input type="checkbox"/>
I like to travel during the fall to view the changing leaves	<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

1

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	

2

Questionnaire

IMAGE TEST MODULE

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Arts Tourism Test Photos



Bethlehem Colonial



Currier Museum



League of NH Craftsmen Fair



Meredith Sculpture Walk



New London Barn 1



New London Barn 2



New London Barn



NH Music Festival



NH Theatre Project



North Country Center for the Arts



Opera North



Prescott Park Arts Festival



Revels North



Tupelo Music Hall



Weathervane Theatre 2



Weathervane Theatre



Winnepesaukee Playhouse



Image 2



Image 1

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

3

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

1. Have you visited any of the following states since August 2021 for a leisure trip? How many trips did you take in each state since August 2021?

[ROTATE]	States visited since August 2021 (Select all that apply)	Number of visits since August 2021
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

2. 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

4

Questionnaire

IF Q2_2=1, ASK Q3

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Website



Visit NH Homepage

3. Is this the New Hampshire website you visited?

- 1. Yes
- 0. No

IF 2_3=1, ASK Q4A

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\FB Homepage



Facebook Homepage

5

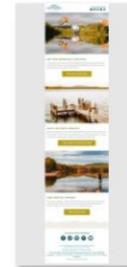
Q4a. Is this the New Hampshire Facebook page you accessed?

- 1. Yes
- 0. No

[ASK ONLY FOR: New England states (MA, NH, VT, ME, CT, RI) & New York]

IF Q2_6=1, ASK Q5b

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Email



Fall Newsletter_1



Fall Newsletter_2

Q5b. Is this similar to the New Hampshire e-newsletter you received?

- 1. Yes
- 0. No

(IF Q1 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 2021.

6. When since August 2021 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- August 2021
- September 2021
- October 2021
- November 2021

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

6_1. How many nights did you spend in New Hampshire during this trip? _____

6_2. Including you, how many people were in your travel party? _____

ASK Q16b if Q6_2 > 1

6b. Of those, how many were children under age 18? _____

6

Questionnaire

ASK Q6c if Q6_1 >0

6c. 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

7. 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:

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

INSERT NEW HAMPSHIRE REGIONS MAP

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

9a. Thinking about your overall travel experience in New Hampshire, would you say it...?

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

7

ASK 9B IF TRIP FAILED TO MEET EXPECTATIONS

9b. Why did the trip fail to meet your expectations? _____

10. 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

11 AND 12 ARE TO ADDRESS AGRITOURISM.

11. Did you visit or participate in any of the following on your trip?

ROTATE, ANCHOR "NONE"	
Farm tours	
Farm-based lodging	
Corn mazes or haunted forests	
Petting farms	
Pick-your-own	
Winery/vineyard	
Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides	
Farmers markets	
Rural wedding	
On-farm seasonal festivals	
Restaurants specializing in local farm to table dining	
Shopping at farm stands/stores	
None of these	

8

Questionnaire

12. 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

13. 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

14. 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

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

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

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

1. Yes
0. No

9

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

AD AWARENESS MODULE

DIGITAL

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Display Ads\AdTheorent Unit_All Markets

ALL MARKETS



I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Display Ads\All Markets\All Audiences_Foliage Tracker_160x600

ALL MARKETS



All
Audiences_Foliage
Tracker_160x600

10

Questionnaire

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Display Ads\Boost_NY, CT, RI

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

	
Boost Audience_Primary Road Trip_300x250	Boost Audience_Retargeting Road Trip Itinerary_160x600

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Display Ads\Long Drive_DE, NC, PA, VA, NJ, MD, OH

DE, NC, PA, VA, NJ, MD AND OH ONLY

	
Long Drive Audience_Primary Road Trip_300x600	Long Drive Audience_Retargeting Road Trip_728x90

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? _____

11

SOCIAL

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Social Ads\USE



I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Social Ads

IG Story_Foliage Tracker



IG Story_FoliageTracker

<https://vimeo.com/631326702>

I:\Ads Master\New Hampshire\2021\Fall 2021 SMARI Assets\Social Ads\Paid Social 15s

IG Story_Apple Picking



IG Story_Apple Picking

<https://vimeo.com/631326998>

IG Story_Hayride



IG Story_Hayride

<https://vimeo.com/631327562>

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

- Yes
- No

12

Questionnaire

FallSocialB. What is your reaction to these ads?

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

FallSocialC. Why do you feel that way? _____

FallGrid1. 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

FallGrid2. 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

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	

13

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 D6]
- 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 racial and ethnic heritage? Are you...?
Select all that apply.
 African-American/black
 Asian/Pacific Islander
 Caucasian/white
 Latino/Hispanic
 Mixed ethnicity
 American Indian
 Other, please specify _____)
- D7. Are you ...?
 Male
 Female
 Other
 Prefer not to answer

14