



New Hampshire

LIVE FREE

**2025 Spring/Summer Advertising
ROI Wave**

October 2025

Background & Objectives

- The New Hampshire Division of Travel and Tourism Development (DTTD) targeted 2025 spring/summer advertising geographically in Core, Opportunity, Road Trip, and Canadian markets. This year also featured the debut of the Behavioral targeted campaign that ran in the Midwest and Eastern U.S. regions.
- DTTD has partnered with its agency of record, GYK Antler, and Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess the effectiveness of the 2025 spring/summer advertising. An initial wave of ad awareness/creative evaluation research was completed in July 2025.
- This current research wave focuses on the impact of the advertising and the return on the media investment (ROI).
- The specific objectives of this ROI research include:
 - Reviewing ad awareness and creative ratings results;
 - Assessing advertising influence on New Hampshire travel during spring/summer 2025;
 - Exploring results by market groups;
 - Reviewing ad impact on New Hampshire trip types; and
 - Providing insights to guide marketing decision-making.

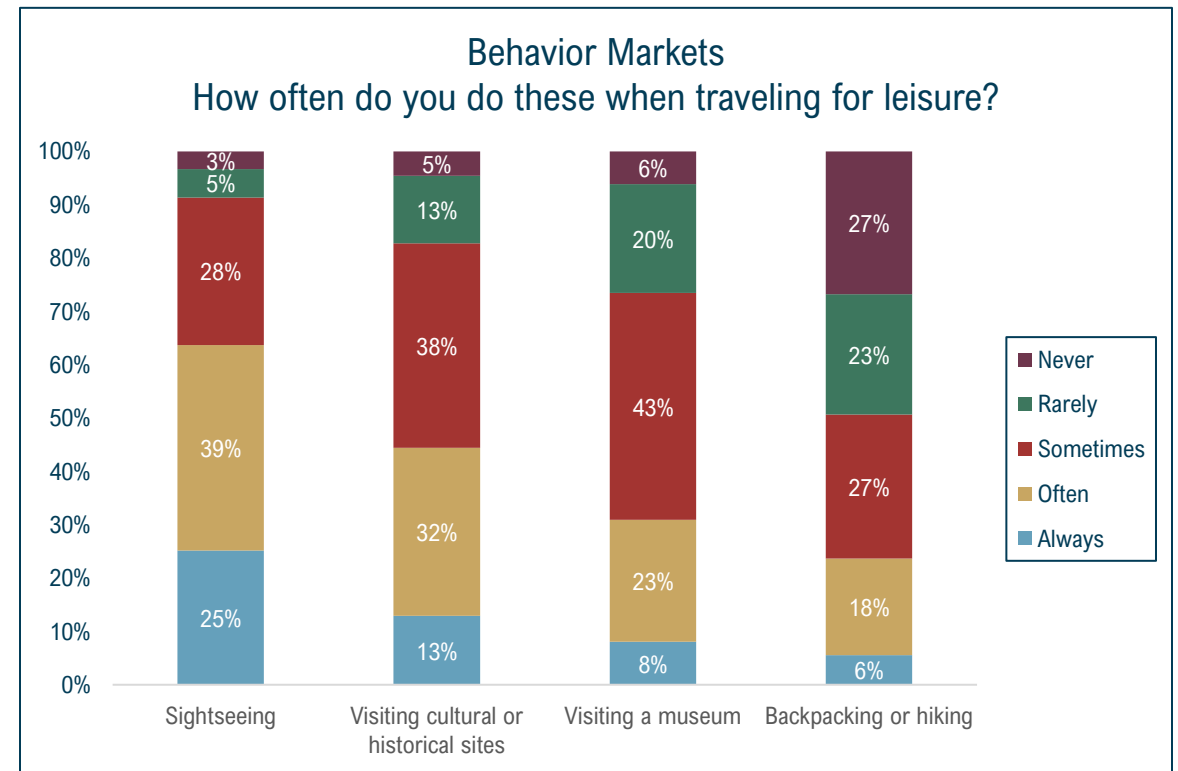
Methodology

- 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 and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels were used so that the results can be projected to the population.
- To qualify for the survey, respondents had to be household travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- The 2025 spring/summer advertising was aimed at existing Core, Opportunity, Road Trip, and Canadian markets.
- This study also included sample from new Behavioral target markets where DTTD ran digital display, native, social media, and rich media advertising featuring content aimed at specific traveler types.
- A total of 2,534 surveys were completed in September 2025. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the ad effectiveness research results.

Market	Frequency	
Core	Boston	333
	Portland/Auburn	105
	Providence/New Bedford	112
Opportunity	Hartford/New Haven	199
	Fairfield County	72
	Duchess County	26
	Orange County	28
	Ulster County	20
	Westchester County	61
	Rockland County	24
	Sullivan County	11
Road Trip	Philadelphia	330
Canada	Montreal	331
Behavioral (new)	DC, DE, GA, IL, IN, KY, MA (minus Boston), MD, MI, NC, NJ, NY (minus select counties), OH, PA (minus Philadelphia), SC	882
Total		2,534

Behavioral Targets

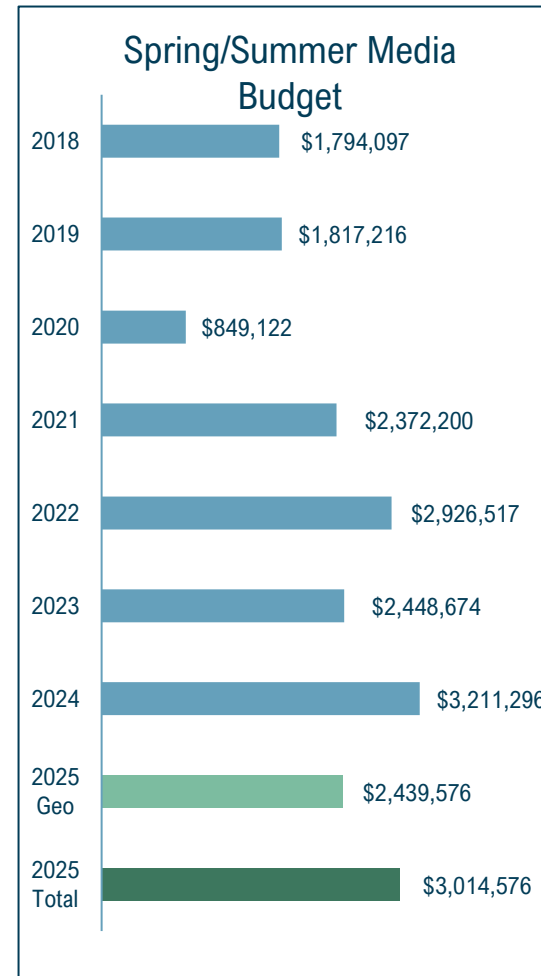
- Consumers in Behavioral markets were classified into targets based on how frequently (Never, Rarely, Sometimes, Often, Always) they participate in the following when traveling for leisure:
 - Sightseeing
 - Visiting cultural or historical sites
 - Visiting a museum
 - Backpacking or hiking
- Those who “always” do any of these things are considered behavioral targets. Overall, 32% of consumers in Behavior markets are classified as targets based on this criteria.
- The chart to the right shows the incidence of the various behavioral targeting activities. Sightseeing has the highest incidence, while backpacking/hiking is the most niche.



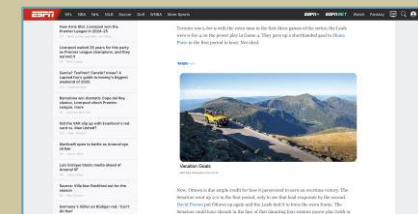
Campaign Overview

Market	PRINT	TV	OOH	CTV/OLV	DISPLAY/NATIVE	SOCIAL	RICH MEDIA	TOTAL
Core	\$25,922	\$146,352	\$133,050	\$289,250	\$61,935	\$111,650	\$0	\$768,159
Opportunity	\$10,358	\$0	\$99,659	\$417,501	\$163,722	\$150,100	\$0	\$841,340
Road Trip	\$15,254	\$0	\$101,829	\$252,001	\$115,921	\$79,000	\$0	\$564,005
Canada	\$0	\$0	\$0	\$121,250	\$124,821	\$20,000	\$0	\$266,071
Geo Subtotal	\$51,534	\$146,352	\$334,538	\$1,080,002	\$466,400	\$360,750	\$0	\$2,439,576
Behavioral	\$0	\$0	\$0	\$0	\$260,000	\$200,000	\$115,000	\$575,000
Total	\$51,534	\$146,352	\$334,538	\$1,080,002	\$726,400	\$560,750	\$115,000	\$3,014,576

- The 2025 spring/summer advertising tested in this research included print, TV, out of home, CTV/OLV, digital display, native, rich media, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The total campaign investment is down about \$200,000 from last year, though the budget for the geographic target saw a much steeper decline of around \$800,000.
- The ads feature New Hampshire's outdoor, small town, road trip, and family-friendly activities and attractions.



Samples of Creative

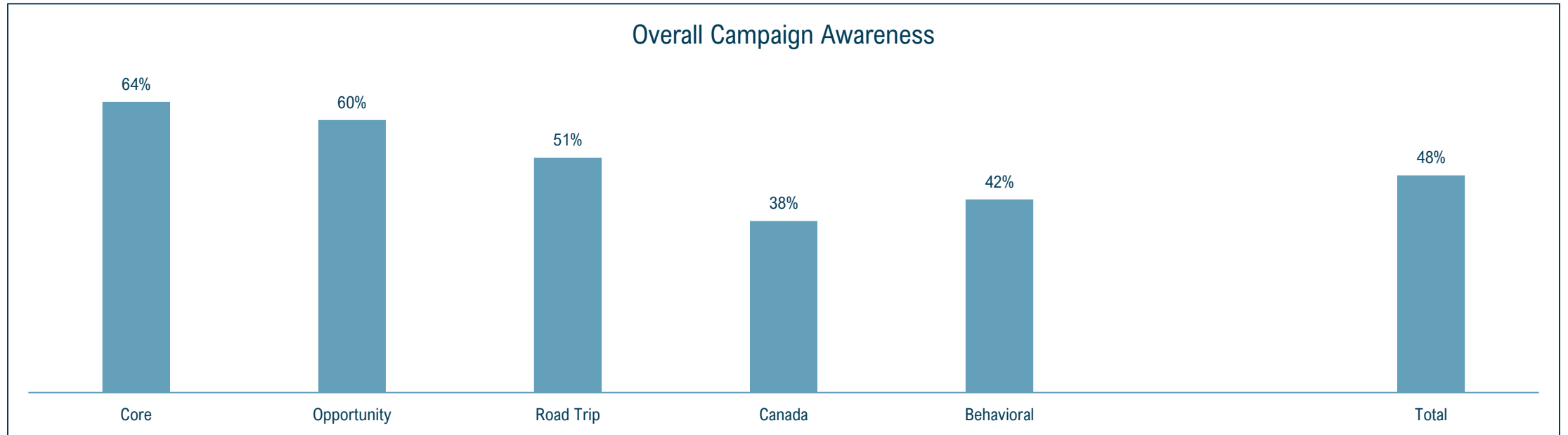


Insights

- The significant change in strategy relative to the Behavioral markets exhibits enormous potential. Key insights from this research include:
 - The 2025 spring/summer advertising generated 48% awareness across all markets.
 - Despite this being the first year of Behavioral targeting, these markets are more aware of the advertising than the Canadian market.
 - The Behavioral media investment was highly efficient at \$0.10 per aware household.
 - The expansion into the geographically larger Behavioral markets resulted in growth in the number of target households and ad-aware households.
 - The spring/summer campaign influenced travel from all the market groups, with the strongest impacts realized in the Core, Opportunity, and Road Trip markets.
 - Overall, the spring/summer 2025 advertising influenced about 368,000 New Hampshire trips, \$625 million in visitor spending, and \$38 million in tax revenue.
 - As in the past, Core markets are a critical element, accounting for 29% of ad-influenced trips. The Behavioral markets generated the most trips, but they are also the largest market. They account for 63% of target households and 41% of influenced trips.
 - Not only did the Behavioral markets generate the most incremental trips, but the travel from these more distant markets also resulted in higher average trip spending.
 - Expanding into the Behavioral markets ultimately delivered year-over-year growth in ad-influenced trips and visitor spending, with ROI holding steady despite higher media investment. The 2025 spring/summer tax ROI is \$13.
 - The Behavioral visitors are more likely than others to go on sightseeing tours, visit historical sites, go hiking/backpacking, and visit state or national parks – aligning with the targeting criteria and providing evidence that the marketing efforts reached the intended audience.

Advertising Awareness

2025 Overall Awareness by Market



- The 2025 spring/summer advertising generated 48% awareness across all markets. This represents slight gains in nearly all markets since the prior awareness wave, with marketing assets running since the prior July study.
- Despite this being the first year of Behavioral targeting, these markets are more aware of the advertising than the Canadian market. Much of the region now targeted behaviorally was explored in the spill market last year and awareness was strong, which could be boosting performance.

2025 Overall Awareness by Market Group

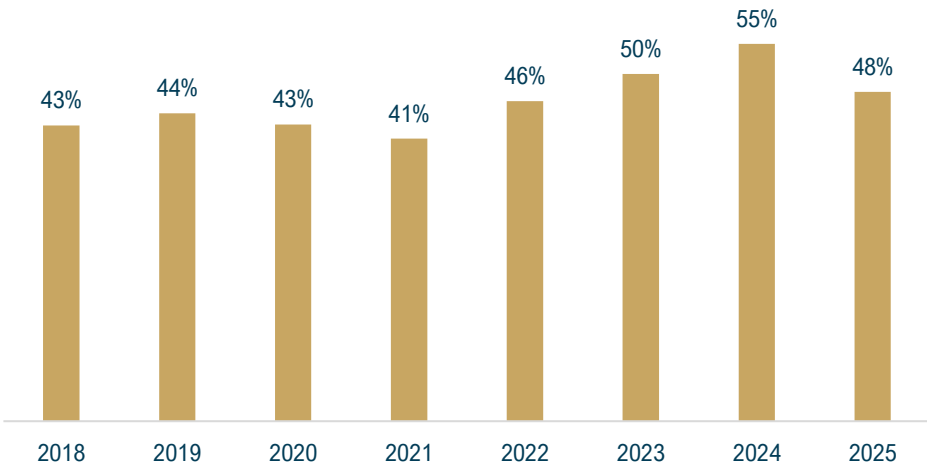
	Core Markets	Opportunity Markets	Road Trip Market	Canadian Markets	Total without Behavioral Target	Behavioral Target	Total with Behavioral Target
Traveling HHs	2,951,376	1,854,939	2,487,168	729,211	8,022,694	13,702,566	21,725,260
Awareness	64%	60%	51%	38%	52%	42%	48%
Aware HHs	1,878,928	1,107,811	1,277,890	274,526	4,185,579	5,796,580	10,335,735
Media Investment	\$768,159	\$841,340	\$564,005	\$266,071	\$2,439,576	\$575,000	\$3,014,576
Cost per Aware HH	\$0.41	\$0.76	\$0.44	\$1.01	\$0.97	\$0.10	\$0.29

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

- The media buy for the Behavioral target was highly efficient at \$0.10 in cost per aware household. Among the geographic targets, the Core market is the most efficient, with a cost per aware household of \$0.41.
- These findings reflect some growth in awareness levels from the prior wave. Additionally, the Behavioral target household size was computed from the survey responses representing those traveling households that always engage in the target behaviors. This represents a reduction of estimated size by about 6 million target households. Still, this represents a larger target with excellent efficiency compared to past periods.

Tracking Awareness Performance

Overall Campaign Awareness

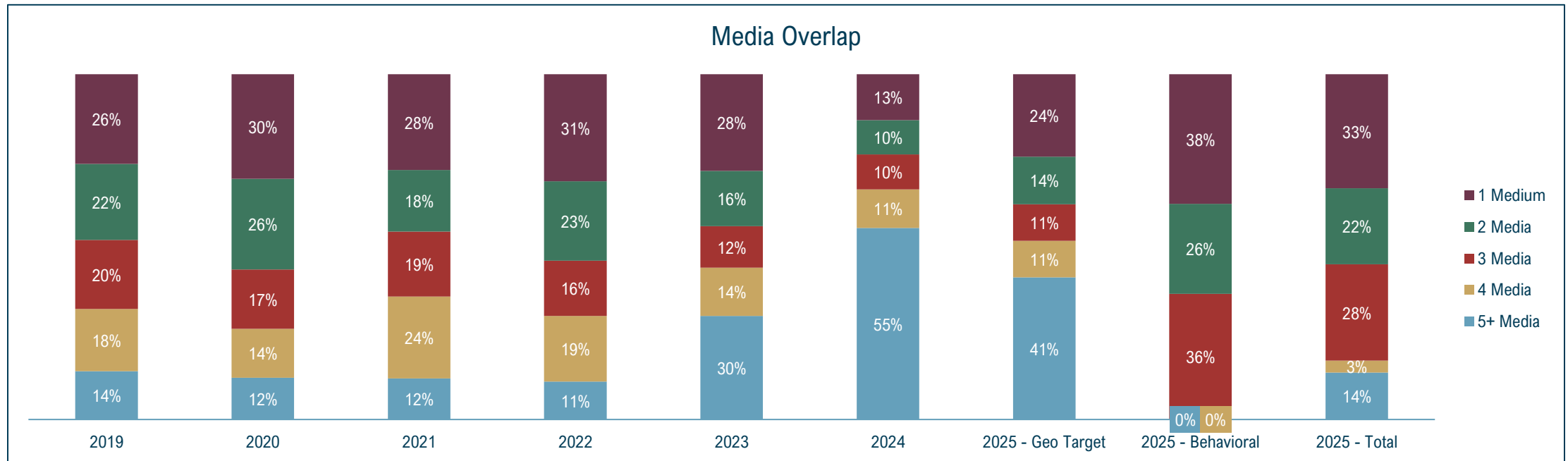


	2018	2019	2020	2021	2022	2023	2024	2025
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,050	17,442,671	21,725,260
Ad Awareness	43%	44%	43%	41%	46%	50%	55%	48%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	9,506,881	10,335,735
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926.52	\$2,448,674	\$2,618,377	\$3,014,576
Cost per Aware HH	\$0.29	\$0.25	\$0.16	\$0.23	\$0.23	\$0.28	\$0.28	\$0.29

- When viewed comparatively to prior spring/summer efforts, the expansion to the geographically larger Behavioral markets resulted in growth in the number of target households. At the same time, reaching this target for the first time, along with a lower Canadian effort, pushed overall awareness down. There was growth in the number of aware households given a larger media spend; however, from an efficiency standpoint, the cost per aware household remained nearly constant.

Media Overlap

- Media overlap decreased this year due to a slightly reduced media budget and a much larger base of target households. The Behavioral targets were only shown assets in three media formats, which also contributes to lower overlap.
- The 2025 geographic target is a closer comparison to the 2024 campaign in terms of markets. Though overlap decreased year over year, there is still strong overlap in this audience.



Advertising Influence & ROI

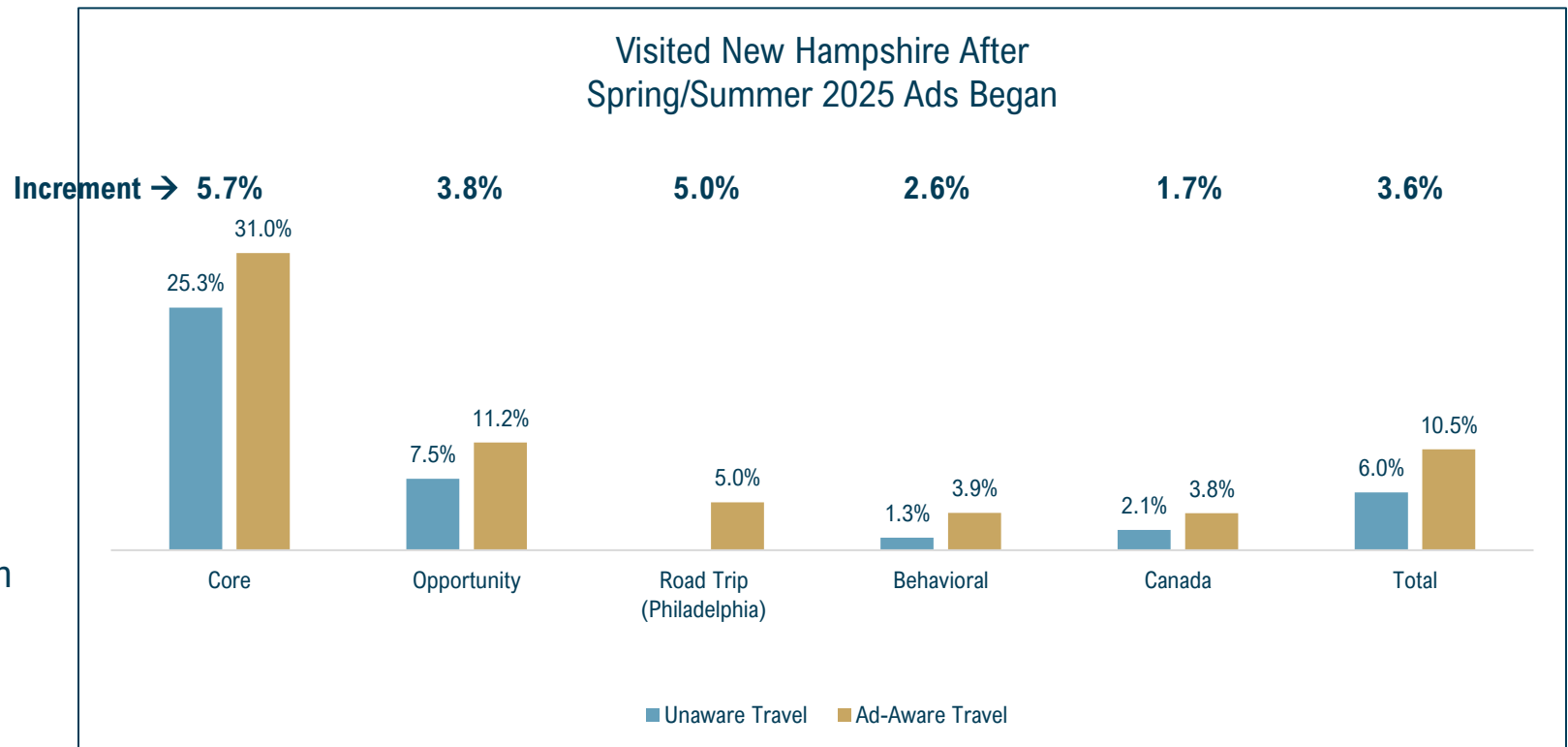
Incremental Travel Review

- SMARInsights' methodology for measuring advertising influence relies on establishing a base rate of travel. Certainly, New Hampshire travel would occur even without any paid advertising. Thus, not all visitation, or even visitation by aware households, is considered attributable to the ads. In this evaluation, the level of travel among unaware households is considered the base and what the state would see without the marketing campaign. Any travel above that base by aware households is what is considered influenced. As such, incremental travel is a conservative measure of influence.



2024 Spring/Summer Incremental Travel

- The spring/summer campaign influenced travel from all markets.
- Outside of the Core and Opportunity markets, base rates of travel are extremely low. This has historically been true of Philadelphia.
- Canada unaware travel is lower than in the past, reflective of current sentiment toward the U.S. Interestingly, the campaign had a positive impact on these travelers.
- Low levels of Behavioral visitation are expected due to greater distances for travelers to overcome. However, given the size of this market, this can have a strong long-term impact.



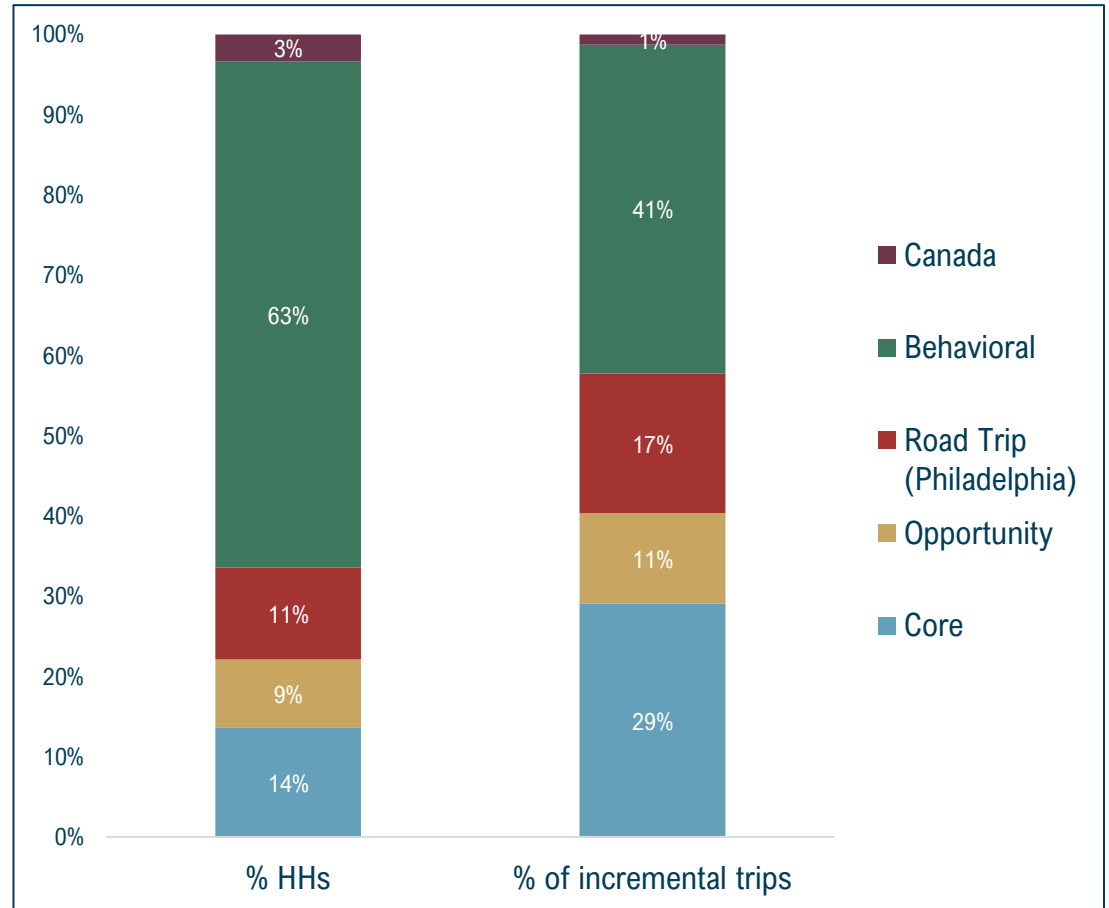
2025 Spring/Summer Ad influenced trips

	Core	Opportunity	Road Trip (Philadelphia)	Behavioral	Canada	Total
Target HHs	2,951,376	1,854,939	2,487,168	13,702,566	729,211	21,725,260
Ad Awareness	64%	60%	51%	42%	38%	48%
Ad-Aware HHs	1,878,928	1,107,811	1,277,890	5,796,580	274,526	10,335,735
Incremental Travel	5.7%	3.8%	5.0%	2.6%	1.7%	3.6%
Incremental Trips	106,906	41,568	63,894	150,750	4,718	367,836

- As in the past, Core markets are a critical element. Spill markets have been replaced by a Behavioral target which generated the most trips overall.
- The net result is 368,000 incremental visits.

2025 Spring/Summer HHs and Influenced Trips by Market

- While Behavioral markets generated the most ad-influenced trips, it is important to consider that they are the largest market group. In fact, they are 63% of target households and 41% of influenced trips.
- Core markets stand out for contributing an outsized share of influenced trips relative to their population.



2025 Spring Summer Ad-Influenced Visitor Spending & ROI

	Core	Opportunity	Road Trip (Philadelphia)	Behavioral	Canada	Total
Incremental Trips	106,906	41,568	63,894	150,750	4,718	367,836
Avg. Trip Spending (among ad-aware visitors)	\$1,177	\$1,080	\$1,584	\$2,295	\$1,549	\$1,700
Ad-Influenced Trip Spending	\$125,839,716	\$44,894,837	\$101,213,433	\$345,970,240	\$7,306,572	\$625,224,798
Media Investment	\$768,159	\$841,340	\$564,005	\$575,000	\$266,071	\$3,014,576
ROI	\$164	\$53	\$179	\$602	\$27	\$207

- This year, domestic travel generally softened in terms volume and room nights. This is illustrated above with all traditional markets and a slight increase in trip spending (consistent with the excellent performance of upscale properties and weaker low-end performance).
- At the same time, not only did targeting the Behavioral segment generate the most incremental trips, but travel from these more distant markets also lead to higher trip spending. The result is a Behavioral ROI that is 3 times that of overall performance.

Spring/Summer 2025 Tax ROI

	Core	Opportunity	Road Trip (Philadelphia)	Behavioral	Canada	Total
Incremental Trips	106,906	41,568	63,894	150,750	4,718	367,836
Avg. Taxable Trip Spending (among ad-aware visitors)	\$869	\$844	\$1,235	\$1,559	\$1,559	\$1,221
Ad-Influenced Taxable Trip Spending	\$92,857,769	\$35,080,629	\$78,927,949	\$235,041,176	\$7,355,636	\$449,263,160
Taxes Generated	\$7,892,910	\$2,981,853	\$6,708,876	\$19,978,500	\$625,229	\$38,187,369
Media Investment	\$768,159	\$841,340	\$564,005	\$575,000	\$266,071	\$3,014,576
Tax ROI	\$10.28	\$3.54	\$11.90	\$34.75	\$2.35	\$12.67

- The significant change in strategy relative to the Behavioral markets exhibits enormous potential. The net result is nearly identical in terms of Tax ROI compared to last year's result. This effort has long-term potential despite no prior guarantee it would deliver a first-year return.

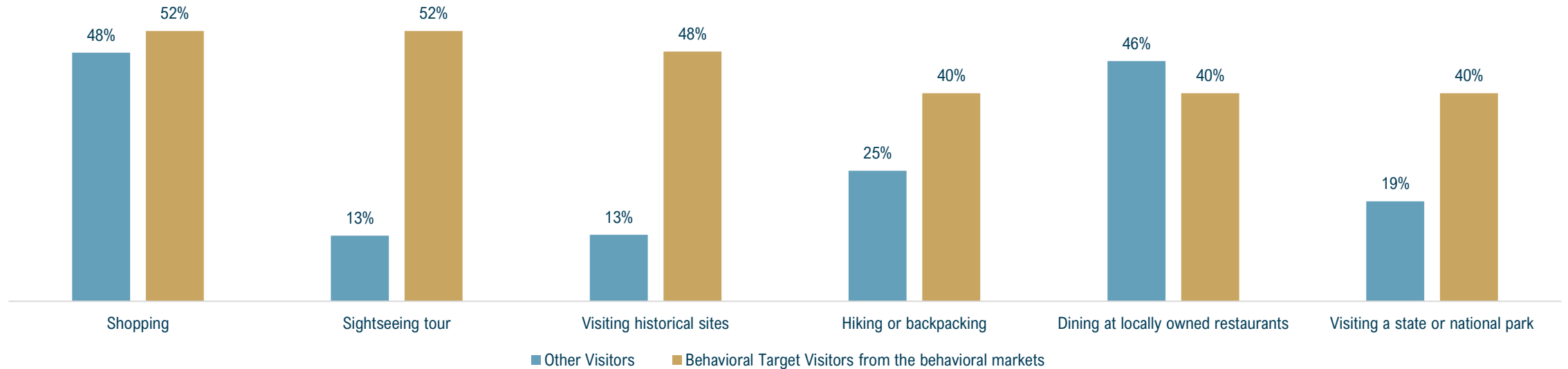
Spring/Summer ROI Tracking

	Spring/Summer 2018	Spring/Summer 2019	Summer 2020	Spring/Summer 2021	Spring/Summer 2022	Spring/Summer 2023	Spring/Summer 2024	Spring/Summer 2025
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,051	17,442,671	21,725,260
Ad Awareness	43%	44%	43%	41%	46%	50%	55%	48%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	9,506,882	10,335,735
Incremental Travel	6.5%	4.4%	3.1%	4.2%	4.6%	5.7%	4.5%	3.6%
Incremental Trips	399,487	317,107	160,763	438,804	594,332	494,462	427,849	367,836
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042	\$1,053	\$1,202	\$1,312	\$1,130	\$1,244	\$1,700
Ad-Influenced Trip Spending	\$321,101,120	\$330,339,600	\$169,243,990	\$527,237,760	\$779,563,175	\$558,680,848	\$532,069,285	625,224,798
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926,517	\$2,448,674	\$2,618,377	\$3,014,576
ROI	\$179	\$182	\$199	\$222	\$266	\$228	\$203	\$207
Avg. Taxable Trip Spending (among ad-aware visitors)	\$598	\$680	\$603	\$778	\$882	\$844	\$919	\$1,221
Ad-Influenced Taxable Trip Spending	\$238,957,240	\$215,567,826	\$97,014,255	\$341,556,238	\$524,184,858	\$417,480,042	\$393,363,150	\$449,263,160
Taxes Generated	\$21,506,152	\$19,401,104	\$8,731,283	\$30,740,062	\$44,555,713	\$35,485,804	\$33,435,868	\$38,187,369
Tax ROI	\$11.99	\$10.68	\$10.28	\$12.96	\$15.22	\$14.49	\$12.77	\$12.67

- Expanding into the Behavioral markets reduced overall ad awareness and incremental travel but ultimately delivered year-over-year growth in ad-influenced trips and visitor spending, with ROI holding steady despite higher media investment.

Trip Activities

New Hampshire Trip Activities



- There are some differences in Behavioral visitors compared to others that align with the behavioral criteria.
- Namely, the Behavioral targets are more likely than others to go on sightseeing tours, visit historical sites, go hiking/backpacking, and visit state or national parks. Shopping and dining are also top activities among this group, but they do not differ from other visitors in this regard.

Total Fiscal Year ROI

This section reviews the seasonal FY2024/2025 results and the total fiscal year combined results. The FY2024/2025 seasons include:

- Fall 2024
- Winter 2024/2025
- Spring/Summer 2025

Fall

- A relatively large fall media investment in 2024 led to strong ad awareness, incremental travel, and ROI.

	Fall 2022	Fall 2023	Fall 2024	% Change
Target HHs	21,562,811	17,429,051	17,220,508	-1%
Ad Awareness	37%	43%	48%	11%
Ad-Aware HHs	8,049,391	7,564,316	8,220,915	9%
Incremental Travel	1.3%	1.4%	2.1%	51%
Incremental Trips	105,635	106,641	175,396	64%
Avg. Trip Spending	\$1,181	\$973	\$1,144	18%
Ad-Influenced Trip Spending	\$124,806,730	\$103,739,534	\$200,666,160	93%
Media Investment	\$226,338	\$206,000	\$342,584	66%
ROI	\$551	\$504	\$586	16%
Avg. Taxable Trip Spending	\$827	\$701	\$851	21%
Ad-Influenced Taxable Trip Spending	\$87,401,514	\$74,765,063	\$149,289,383	100%
Taxes Generated	\$7,429,129	\$6,355,030	\$12,689,598	100%
Tax ROI	\$33	\$31	\$37	19%

Winter

- Winter 2024-2025 ad-influenced visitor spending and ROI rebounded from the prior year, when the results were suppressed by poor snow conditions and an unfavorable exchange rate for the Canadian markets.

	Winter 2022-2023	Winter 2023-2024	Winter 2024-2025	% Change
Target HHs	5,519,065	4,474,498	4,998,863	12%
Ad Awareness	61%	56%	63%	13%
Ad-Aware HHs	3,371,419	2,515,898	3,159,525	26%
Incremental Travel	2.8%	2.5%	2.4%	-4%
Ad-Influenced Trips	96,073	64,104	77,362	21%
Average Trip Spending	\$1,492	\$1,288	\$1,599	24%
Ad-Influenced Spending	\$143,382,835	\$82,593,685	\$123,667,806	50%
Media Investment	\$406,766	\$538,388	\$371,670	-31%
ROI	\$352	\$153	\$333	118%
Avg. Taxable Trip Spending	\$1,023	\$1,037	\$1,125	8%
Ad-Influenced Taxable Spending	\$98,327,450	\$66,445,164	\$87,011,635	31%
Taxes Generated	\$8,849,470	\$5,647,839	\$7,395,989	31%
Tax ROI	\$22	\$10	\$20	90%

Spring/Summer

- Expanding the marketing area to include the distant and populous behaviorally targeted markets led to some softening in ad awareness, incremental travel, and ad-influenced trips – but aiming targeted ads at a large group ultimately resulted in YOY gains in ad-influenced trips and visitor spending. And with a larger media investment, ROI is equal to last year.

	Spring/Summer 2023	Spring/Summer 2024	Spring/Summer 2025	% Change
Target HHs	17,429,051	17,442,671	21,725,260	25%
Ad Awareness	50%	55%	48%	-13%
Ad-Aware HHs	8,742,575	9,506,882	10,335,735	9%
Incremental Travel	5.7%	4.5%	3.6%	-20%
Incremental Trips	494,462	427,849	367,836	-14%
Avg. Trip Spending	\$1,130	\$1,244	\$1,700	37%
Ad-Influenced Trip Spending	\$558,680,848	\$532,069,285	\$625,224,798	18%
Media Investment	\$2,448,674	\$2,618,377	\$3,014,576	15%
ROI	\$228	\$203	\$207	2%
Avg. Taxable Trip Spending	\$844	\$919	\$1,221	33%
Ad-Influenced Taxable Trip Spending	\$417,480,042	\$393,363,150	\$449,263,160	14%
Taxes Generated	\$35,485,804	\$33,435,868	\$38,187,369	14%
Tax ROI	\$14	\$13	\$13	-1%

Total FY2024/2025 ROI

- Accounting for all FY2024/25 campaigns, the advertising influenced \$949 million in visitor spending, \$58 million in tax revenue, and visitor spending and tax ROIs of \$255 and \$16, respectively.

	Fall 2024	Winter 2024/2025	Spring/Summer 2025	Total FY 2024/2025
Ad-Influenced Trips	175,396	77,362	367,836	620,594
Avg. Trip Spending (among ad-aware visitors)	\$1,144	1,599	1,700	\$1,530
Ad-Influenced Trip Spending	\$200,666,160	123,667,806	625,224,798	\$949,558,764
Avg. Taxable Trip Spending	\$851	\$1,125	\$1,221	\$1,105
Ad-Influenced Taxable Trip Spending	\$149,289,383	\$87,011,635	\$449,263,160	\$685,564,178
Taxes Generated	\$12,689,598	\$7,395,989	\$38,187,369	\$58,272,956
Media Investment	\$342,584	\$371,670	\$3,014,576	\$3,728,830
ROI	\$586	\$333	\$207	\$255
Tax ROI	\$37	\$20	\$13	\$16

Total FY ROI Comparison

	Total Fiscal Year 2017/2018	Total Fiscal Year 2018/2019	Total Fiscal Year 2019/2020	Total Fiscal Year 2020/2021	Total Fiscal Year 2021/2022	Total Fiscal Year 2022/2023	Total Fiscal Year 2023/2024	Total Fiscal Year 2024/2025
Influenced Trips	604,055	636,170	555,681	529,505	743,727	696,170	598,594	620,594
Avg. Trip Spending	\$839	\$900	\$1,103	\$1,101	\$1,288	\$1,188	\$1,200	\$1,530
Influenced Trip Spending	\$506,679,581	\$572,280,741	\$613,102,160	\$583,077,833	\$958,161,359	\$826,870,413	\$718,402,504	\$949,558,764
Avg. Taxable Trip Spending	\$586	\$583	\$736	\$751	\$871	\$866	\$893	\$1,105
Influenced Taxable Trip Spending	\$353,937,438	\$370,684,548	\$408,746,075	\$397,603,983	\$647,472,232	\$603,209,006	\$534,573,377	\$685,564,178
Taxes Generated	\$31,854,370	\$33,361,609	\$36,787,146	\$35,784,358	\$55,035,140	\$51,272,765	\$45,438,737	\$58,272,956
Media Spending	\$2,481,988	\$2,567,179	\$1,545,410	\$2,962,296	\$3,450,473	\$3,081,778	\$3,362,765	\$3,728,830
ROI	\$204	\$223	\$397	\$197	\$278	\$268	\$214	\$255
Tax ROI	\$13	\$13	\$24	\$12	\$16	\$17	\$14	\$16

- Total FY2024/2025 ROI is up compared to last year. The additional fall media investment was fruitful, winter results rebounded due to better snow conditions, and the spring/summer behavioral targeting effort resulted in some immediate impact.

Appendix: Spring/Summer ROI Questionnaire

Spring/Summer ROI Questionnaire

SMARinsights

New Hampshire Tourism
2025 Spring/Summer Ad Effectiveness Wave 2
August 2025

SCREENER MODULE

S1. What is your postal/ZIP code? _____

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

S2. Please indicate which of the following describe you.

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

TERMINATE IF TRIP AND PLAN BOTH = 0

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

S5. Which of the following social networking sites do you use?
Select all that apply.

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

Strategic Marketing & Research Insights

SMARinsights

S6 IS TO CLASSIFY BEHAVIOR TARGETS:

S6. How often do you do each of the following when traveling for leisure?

ROTATE	Never	Rarely	Sometimes	Often	Always
Sightseeing					
Visiting cultural or historical sites					
Visiting a museum					
Backpacking or hiking					

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					

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FOR P4, HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST NOT VERY FAMILIAR AT P2.

P4. How much do you agree that each of these statements describes STATE?

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
A good place to live					
A good place to start a career					
A good place to start a business					
A good place to attend college					
A good place to purchase a vacation home					
A good place to retire					
A good place to relocate a business					
A good place to attend a meeting, conference or trade show					

TRAVEL MODULE

T1. Have you traveled to or within any of the following states for a leisure trip in 2025? How many trips did you take to or within each state in 2025?

[ROTATE]	States visited in 2025	Number of visits in 2025
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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

T2. When in 2025 did you travel to or within New Hampshire?

January	
February	
March	
April	
May	
June	
July	
August	
September	

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

T2a. How far in advance did you begin to plan this trip?

- Less than 1 month
- 1 to 2 months
- 3 to 4 months
- 5 to 6 months
- 7 or more months
- Don't know

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

ASK T4 IF T3 > 1

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

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

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

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

ASK T6 IF T5 > 0

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

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

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

Hiking or backpacking	Wildlife watching
Visiting a state or national park	Bird watching
Bicycling or mountain biking	Scenic drive
ATVing	Sightseeing tour
Rock climbing	Golfing
Horseback riding	Shopping
Hunting	Dining at locally owned restaurants
Camping	Visiting a noteworthy bar or nightclub
River rafting	Farm to table dinner
Fishing	Winery tours
Visiting museums	Beer trail
Attending a play or concert	Farmer's markets/U-picks/roadside stand
Attending a festival or fair	Canoeing or kayaking
Attending performing arts (music/theater)	Boating
Visiting historical sites	
	Other, please specify _____
	None of these

SHOW THE ACTIVITIES SELECTED IN T7 AND ASK:

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

SHOW NEW HAMPSHIRE REGIONS MAP AND ASK T9.

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

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

- Excellent
- Very good
- Good
- Fair
- Poor

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T11. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

Please complete all fields. Your best estimate is fine. If no expenditures in a category enter a "0"

Accommodations (includes campground fees)	
Food and beverage service	
Food stores	
Local transportation & gasoline	
Arts, entertainment, and recreation	
Retail sales	
Visitor air	
Other	
Total	SHOW TOTAL

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

- Very likely
- Somewhat likely
- Not likely

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AD AWARENESS MODULE

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

DIGITAL:

BEHAVIORAL TARGETED STATES

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Standard Display\Behavioral

 VisitSummer25_Behavioral_Family Culture_300x600	 VisitSummer25_Behavioral_Family_Hiking_300x600	 VisitSummer25_Behavioral_Friends Friends_300x600
 VisitSummer25_Behavioral_Friends_Hiking_300x600	 VisitSummer25_Behavioral_Retargeting_300x600	

CANADA

French

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Standard Display\Canada\VisitSummer25_Canada_300x600

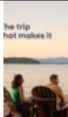


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CORE, OPPORTUNITY, LONG HAUL MARKETS

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Standard Display\Core_Opp_Long Haul

 5-5_VisitSummer25_Non Family Canoe_300x600	 5-5_VisitSummer25_Non Family Fire PH_300x600	 5-5_VisitSummer25_Retargeting_300x600
 5-5_VisitSummer25_Family_Hiking_300x600	 5-5_VisitSummer25_Family_Kayak_300x600	

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

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

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NATIVE:

BEHAVIORAL TARGETED STATES

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Native Display\Behavioral\Native Images\Cultural\USE

Cultural



I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Native Display\Behavioral\Native Images\Hiking\USE

Hiking



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

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

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Cultural Native Video



<https://vimeo.com/1090159827>

Hiking Native Video



<https://vimeo.com/1090159756>

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

CORE, OPPORTUNITY, LONG HAUL MARKETS

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Native Display\Core_Opp_LongHaul\USE



Have you seen any of these or similar online ads before now?
 Yes, I have seen this ad before
 No, I have not seen this ad before

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NEW YORK TIMES:

CORE, OPPORTUNITY, LONG HAUL MARKETS

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\New York Times (Core_Opp_Long Haul)\USE



New York Times Friends



New York Times Words Out

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

RICH MEDIA:

BEHAVIORAL TARGETED STATES

Culture



<https://vimeo.com/1090193166>

Hiking



<https://vimeo.com/1090196631>

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CORE, OPPORTUNITY, LONG HAUL MARKETS



<https://vimeo.com/1090198707>

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:

CORE, OPPORTUNITY, LONG HAUL, CANADA MARKETS



<https://vimeo.com/1090210818>



<https://vimeo.com/1090210556>

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NEW HAMPSHIRE ONLY:

WMUR TV



<https://vimeo.com/1090214695>



<https://vimeo.com/1090214373>

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

Yes
No

SOCIAL ADS:
ASK IF 55 > 0

CANADA
French

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Paid Social\Canada\USE



Canada_Story_French_Family



Canada_Story_French_Friends

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English

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Paid Social\Canada\USE



Canada_Story_English_Family



Canada_Story_English_Friends

CORE, OPPORTUNITY, LONG HAUL MARKETS

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Paid Social\Core_Opp_Long Haul\USE



FE_US_Canood_Family



FE_US_Canood_Friends



FE_US_Static_Family



FE_US_Static_Friends



Static_Story_Family



Static_Story_Friends

Have you seen this or a similar social media ad before now?

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

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OOH:

CORE, OPPORTUNITY, LONG HAUL MARKETS

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\OOH (core_opp_long haul)\USE



Carot_OOH



Chocoma_OOH



Group_OOH



MA_Washington_OOH



Baltimore_OOH



Spauld_Crook_OOH

BOSTON ONLY

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Unique OOH\Boston\Fenway



<https://vimeo.com/1090502249>

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PHILADELPHIA ONLY

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Unique OOH\Philadelphia



Philly_Double_Decker_1



Philly_Double_Decker_2



Philly_Double_Decker_3



Philly_MSI_Complete

Have you seen this or a similar ad before now?

- Yes
- No

CORE, OPPORTUNITY, LONG HAUL MARKETS

PRINT:

I:\Ads Master\New Hampshire\2025\2025 SpringSummer\OneDrive_1_6-2-2025\Print



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

- Yes
- No

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DEMO MODULE

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

- D1. Are you currently ...?
 - Married/living as married
 - Divorced/Separated
 - Widowed
 - Single/Never married
- D2. Including you, how many people are currently living in your household? _____ [IF 1, SKIP TO D4]
- D3. How many living in your household are children under the age of 18? _____
- D4. Which of the following categories represents the last grade of school you completed?
 - High school or less
 - Some college/technical school
 - College graduate
 - Post-graduate degree
- D5. Which of the following categories best represents your total annual household income before taxes?
 - Less than \$35,000
 - \$35,000 but less than \$50,000
 - \$50,000 but less than \$75,000
 - \$75,000 but less than \$100,000
 - \$100,000 but less than \$150,000
 - \$150,000 but less than \$200,000
 - \$200,000 or more
- D6. Which of the following best describes your race or ethnicity? Are you...?

Select all that apply.

 - White
 - Hispanic or Latino
 - Black or African American
 - Asian
 - American Indian or Alaska Native
 - Middle Eastern or North African
 - Native Hawaiian or Other Pacific Islander
- D7. What is your preferred gender identity ...?
 - Male
 - Female
 - Other
 - Prefer not to answer

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