

2026 Spring/Summer Advertising ROI Wave

October 2026

SMARInsights

Background & Objectives

- For the 2026 spring/summer campaign, the New Hampshire Division of Travel and Tourism Development (DTTD) targeted advertising geographically in core, opportunity, Florida, and Canadian markets. Additionally, a behaviorally targeted campaign ran across a broader range of distant markets.
- DTTD has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess the effectiveness of the 2026 spring/summer advertising.
- 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 2026;
  - Exploring results by market groups;
  - Reviewing ad impact on New Hampshire trip types; and
  - Providing insights to guide marketing decision-making.

Methodology

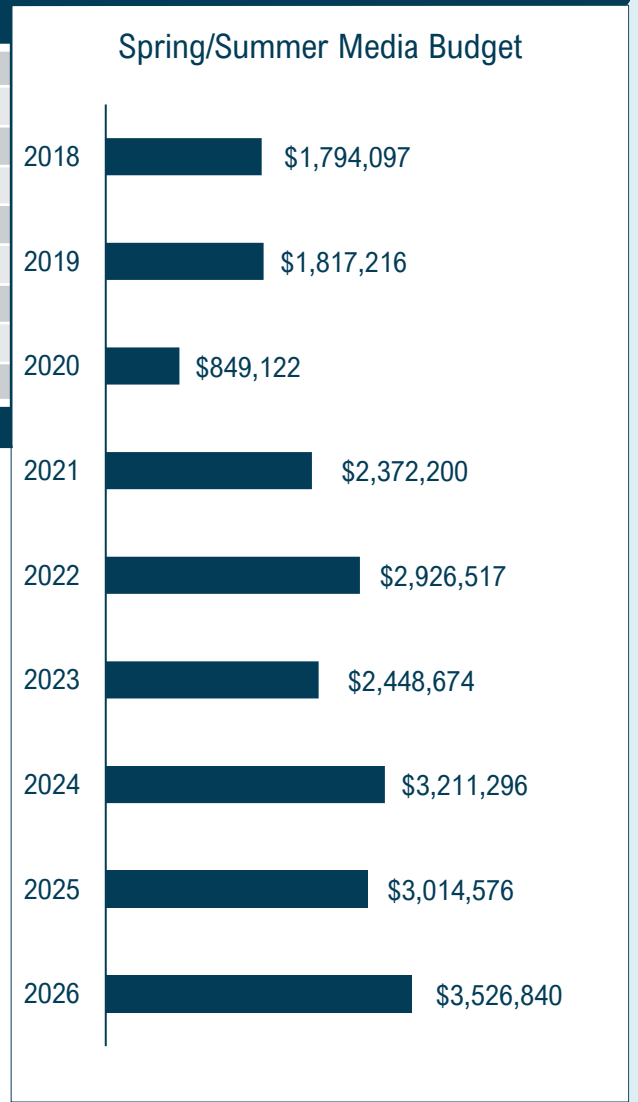
- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. This method provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors 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 2026 spring/summer advertising was targeted similarly to last year with some modifications, including reclassifying Philadelphia as an opportunity market (rather than a separate road trip market), using the whole state of Connecticut, adding Florida markets, and reducing the number of behavioral markets.
- The behavioral target markets received digital display, native, social media, and rich media advertising tailored to specific traveler types.
- A total of 2,253 surveys were completed in September 2026. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.

Market		Frequency
Core	Boston	300
	Portland/Auburn	68
	Providence/New Bedford	101
Opportunity	Philadelphia	200
	Connecticut	102
	Duchess, Orange, Ulster, Westchester, Rockland and Sullivan Counties NY	81
Florida	Orlando	120
	Tampa	152
	Ft. Myers	28
Canada	Montreal	300
Behavioral	DC, GA, IL, KY, MA (minus Boston), MI, NC, NJ, NY (minus select counties), OH, PA (minus Philadelphia), VA, VT	800
Total		2,253

Campaign Overview

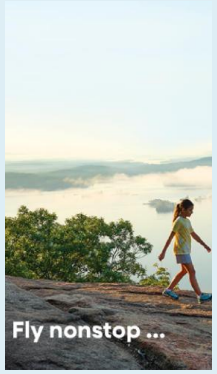
GEOGRAPHY	PRINT	TV	OOH	CTV	OLV	DISPLAY	SOCIAL	TOTAL
CORE	$55,923	$108,000	$153,206	$213,750	$86,250	$75,000	$132,000	$824,129
OPPORTUNITY	$0	$0	$206,506	$325,000	$134,000	$172,250	$184,000	$1,021,756
CANADA	$0	$0	$0	$40,000	$20,000	$71,400	$20,000	$151,400
FLORIDA	$0	$0	$120,220	$269,000	$151,250	$156,250	$120,000	$816,720
BEHAVIORAL	$0	$0	$0	$0	$126,088	$173,912	$150,000	$450,000
FIFA	$10,000	$0	$0	$0	$0	$1,540	$45,000	$56,540
America250	$10,000	$0	$0	$0	$0	$21,640	$75,000	$106,640
CHOOSE NH	$1,540	$0	$0	$0	$0	$13,740	$40,000	$55,280
PROUD TO BE 603	$0	$24,374	$0	$0	$0	$0	$20,000	$44,374
	$77,463	$132,374	$479,932	$847,750	$517,588	$685,732	$786,000	$3,526,840

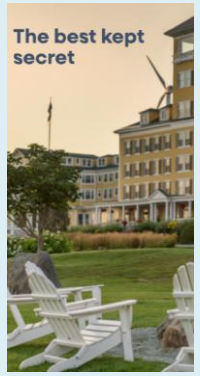
- The 2026 spring/summer advertising tested in this research included print, TV, out of home, CTV/OLV, digital display, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The total campaign investment increased by more than $500,000 (17%) over last year. However, this additional funding was distributed across several other campaigns not included last year—a FIFA effort, America250, Choose NH, and Proud to be 603.
- In terms of the primary campaign, the Florida market was added, while spending on the behavioral markets declined. Additionally, the campaign was refreshed compared to last year, inclusive of new music.



Sample Ads













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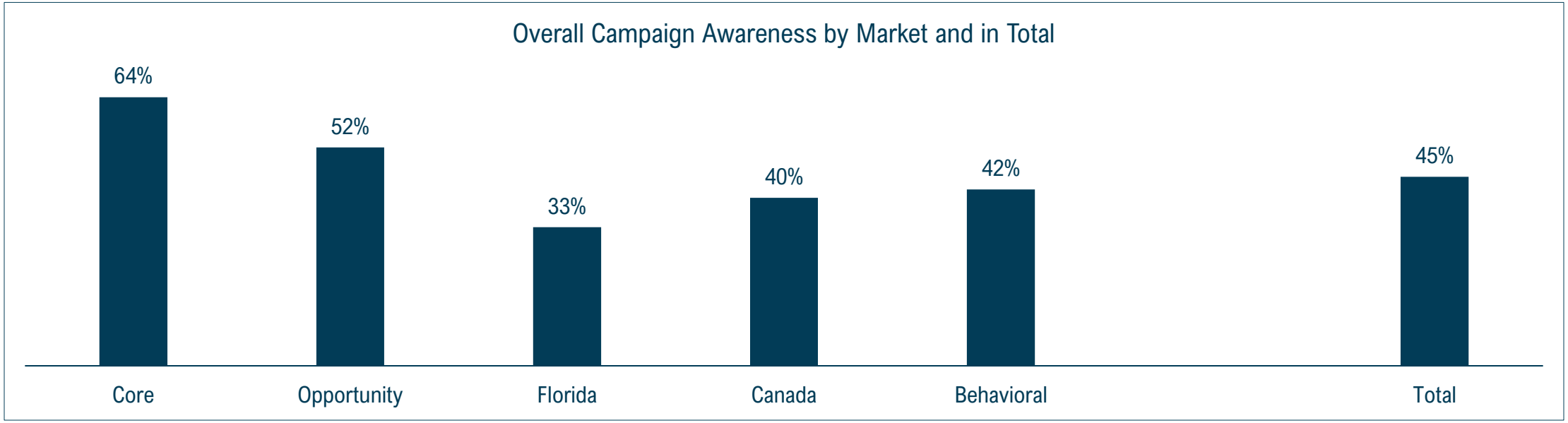
Insights

- Before the spring/summer campaign, there was every reason to temper expectations. A number of travel trends and leading indicators suggested some weakening in domestic travel. Inflation was on the rise, gas prices were up, and there was a war in the Middle East. On top of this, key domestic travel trends were K-shaped, with luxury experiences thriving and lower-end products performing poorly. None of this seemed encouraging for New Hampshire.
- In the initial advertising effectiveness wave, overall awareness showed some slippage; however, it was strong in the nearby core markets. While fewer traveling households were reached, a growth in spending resulted in higher frequency of exposure. This, combined with refreshed creative and excellent ratings, positively indicated potentially strong increments.
- All things considered, results were extremely positive. Strong, high-frequency creative performed exceedingly well in the nearby markets. Both the core and opportunity markets had extremely strong incremental travel rates as people traveled closer to home.
- This growth in incremental visits from closer markets resulted in a decline in the average trip spending. Despite the slippage in spending, overall influenced spending rose 25% year over year to a record high because incremental visits more than doubled.
- Coupled with an increased media spend, this yielded the second-highest tax ROI to date at $14.89.
- As foreshadowed by the excellent response to the creative, all markets delivered incremental travel, spend, and other positive results – albeit the distant markets showed the weakest performance.

Advertising Awareness

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2026 Overall Awareness



- The 2026 spring/summer advertising campaign generated 45% awareness across all markets.
- As has historically been observed, awareness performance is largely influenced by proximity to New Hampshire and levels of media investment. Nearby core markets achieved the highest awareness levels, while Florida recorded the lowest.

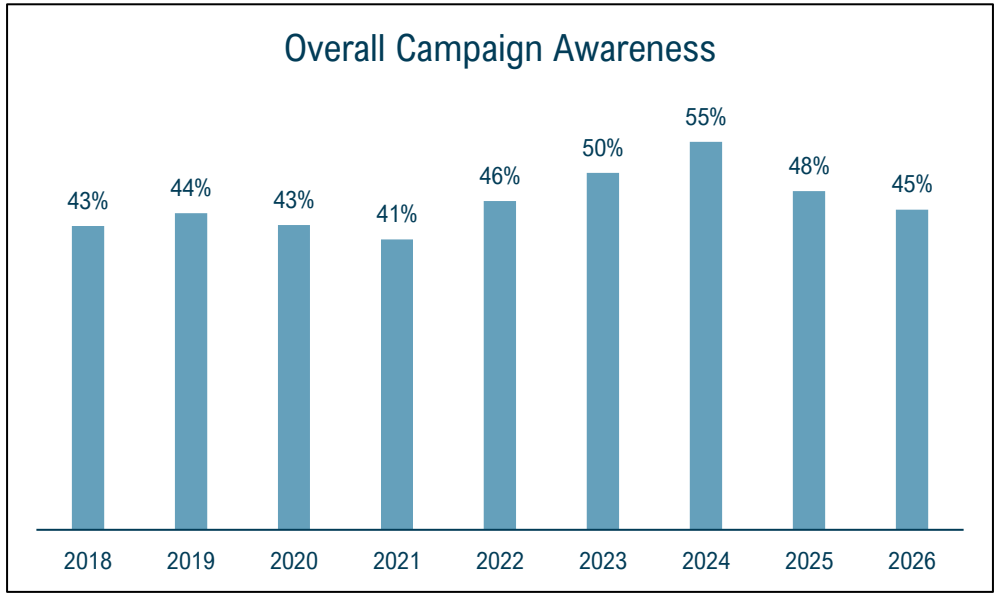
2026 Cost Per Aware Household

	Core Markets	Opportunity Markets	Canadian Markets	Florida Markets	Behavioral Target	Total
Traveling HHs	2,951,376	4,342,107	729,211	3,812,408	10,150,481	21,985,583
Awareness	64%	52%	40%	33%	42%	45%
Aware HHs	1,894,783	2,258,417	288,038	1,258,095	4,253,052	9,952,385
Media Investment	$1,042,589	$1,021,756	$151,400	$816,720	$450,000	$3,482,466
Cost per Aware HH	**$0.55**	**$0.45**	**$0.53**	**$0.65**	**$0.11**	**$0.35**

SMARInsights' spot market benchmark: $0.50 per Aware Household

- The 2026 advertising generated just shy of 10 million ad-aware households. Factoring in the media budget of roughly $3.5 million, this results in a cost per aware household of $0.35 for the campaign, which outperforms SMARInsights' benchmark for comparable campaigns.
- The media buy in the opportunity markets is the most cost-effective of the geographic market groups and is more efficient than the benchmark for similar campaigns. The core and Canadian markets are efficient as well but narrowly exceed the $0.50 benchmark.
- The behavioral target is broadening the reach of the campaign, contributing 4.2 million ad-aware households on a relatively small investment of $450,000.
- The awareness and spend figures presented here have been calculated across all campaign activity rather than the primary campaign alone. This contributes to the higher cost per aware household compared to prior years (not shown), as the additional investments in America250, the supplementary FIFA campaign, and Choose NH were relatively limited and only generated modest incremental awareness. The following slide compares the cost per aware household of the 2026 campaign to prior years.

Tracking Awareness Performance

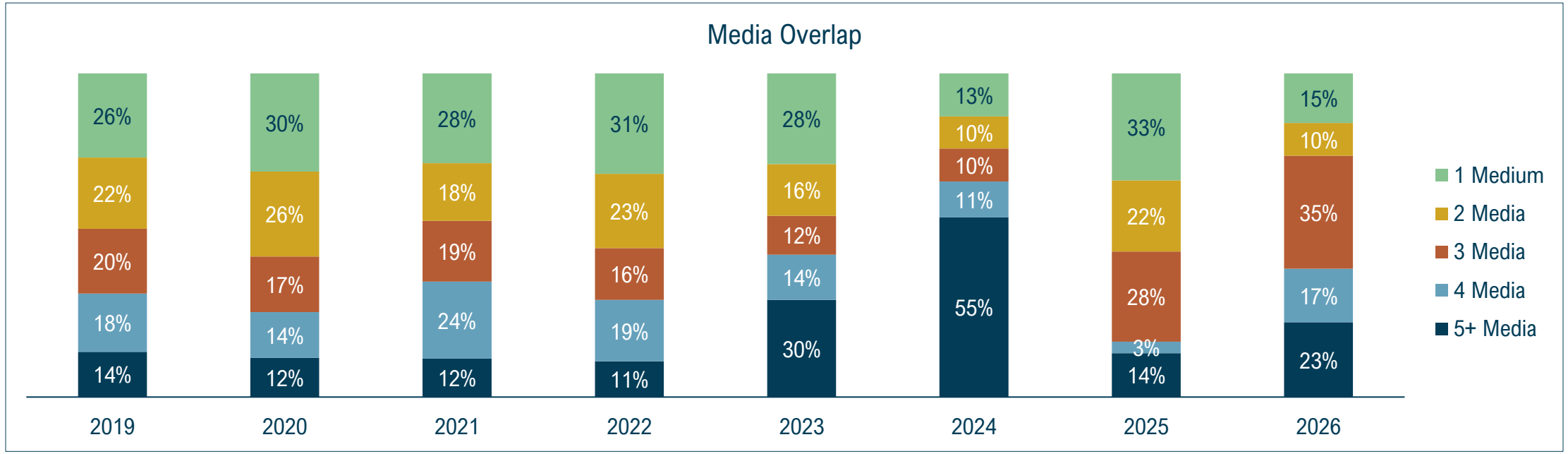


	2019	2020	2021	2022	2023	2024	2025	2026
Target HHs	16,275,450	12,147,318	25,765,229	27,787,051	17,429,050	17,442,671	21,725,260	21,985,583
Ad Awareness	44%	43%	41%	46%	50%	55%	48%	45%
Ad-Aware HHs	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	9,506,881	10,335,735	9,952,385
Media Investment	$1,817,216	$849,122	$2,372,200	$2,926.52	$2,448,674	$2,618,377	$3,014,576	$3,482,466
Cost per Aware HH	**$0.25**	**$0.16**	**$0.23**	**$0.23**	**$0.28**	**$0.28**	**$0.29**	**$0.35**

- When viewed comparatively to prior spring/summer efforts, the increased media spend was distributed across different markets – including the introduction of Florida and a narrowing of the behavioral target. At the same time, the campaign was refreshed. The result was a slippage in awareness percentage and aware households, as well as a higher cost per aware household. However, the creative was strongly received this summer, hinting at potentially stronger effectiveness.

Media Overlap

- Media overlap has often been used as a proxy for campaign frequency and message reinforcement. With increased media investment yielding little measurable improvement in overall awareness, the primary impact appears to have been greater campaign message frequency and increased exposure across multiple media channels.
- Although the additional spend did not translate into higher awareness, increased frequency may still improve broader campaign outcomes.



Advertising Influence & ROI

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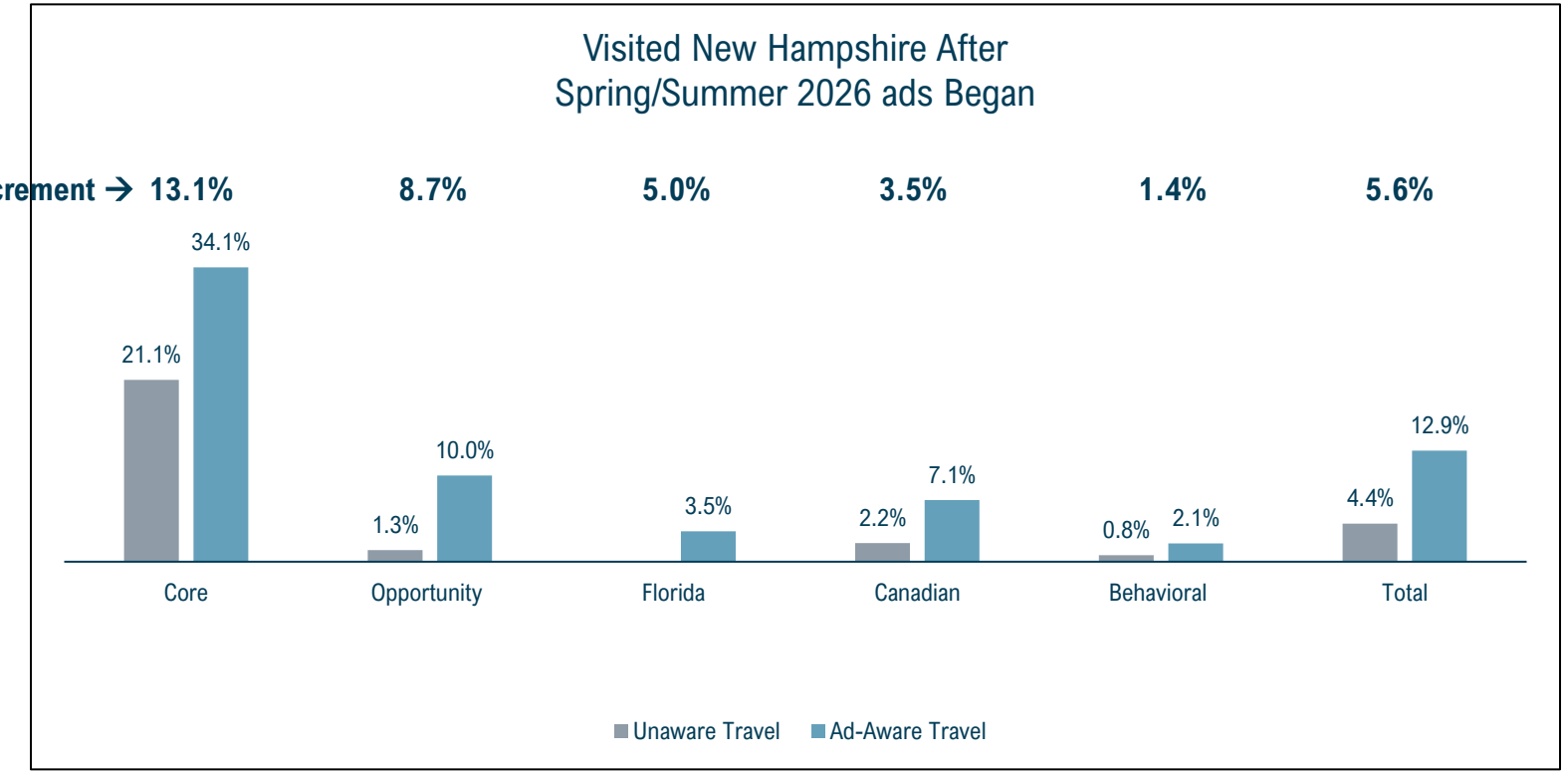
Incremental Travel Review

- 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.



2026 Spring/Summer Incremental Travel

- This year's spring/summer campaign influenced travel from all media markets.
- As was somewhat expected in light of economic considerations, gas prices, and overall travel trends, the core markets performed the strongest in terms of travel to the state and increment.
- The behavioral markets, which represent more distant travel, performed much more weakly.
- Notably, the Canadian and Florida markets generated incremental travel.



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2026 Spring/Summer Ad-Influenced Trips

	Core	Opportunity	Canada	Florida	Behavioral	Total
Target HHs	2,951,376	4,342,107	729,211	3,812,408	10,150,481	21,985,583
Ad Awareness	64%	52%	40%	33%	42%	45%
Ad-Aware HHs	1,894,783	2,258,417	288,038	1,258,095	4,253,052	9,952,385
Incremental Travel	13.1%	8.7%	5.0%	3.5%	1.4%	5.6%
Incremental Trips	247,554	195,729	14,312	44,299	58,176	560,071

- Despite the lower level of overall awareness seen this summer, the higher media spend yielded greater frequency of exposure to widely-liked creative, which resulted in a very strong increment.
- This summer's results show an increment that is over twice that of last year, yielding a total of 560,000 incremental trips.

2026 Spring/Summer Ad-Influenced Visitor Spending & ROI

	Core	Opportunity	Canada	Florida	Behavioral	Total
Incremental Trips	247,554	195,729	14,312	44,299	58,176	560,071
Avg. Trip Spending (among ad-aware visitors)	$1,076	$1,466	$1,508	$2,302	$1,832	$1,399
Ad-Influenced Trip Spending	$266,380,999	$286,958,856	$21,586,351	$101,976,574	$106,559,300	$783,462,079
Media Investment	$1,042,589	$1,021,756	$151,400	$816,720	$450,000	$3,482,466
ROI	$255	$281	$143	$125	$237	$225

- These results illustrate a generally well-balanced ROI performance across all markets. The weakest performances were in Canada and Florida, as Canada continues to avoid travel to the U.S. and Florida faces the longest travel distance.

Spring/Summer ROI Tracking

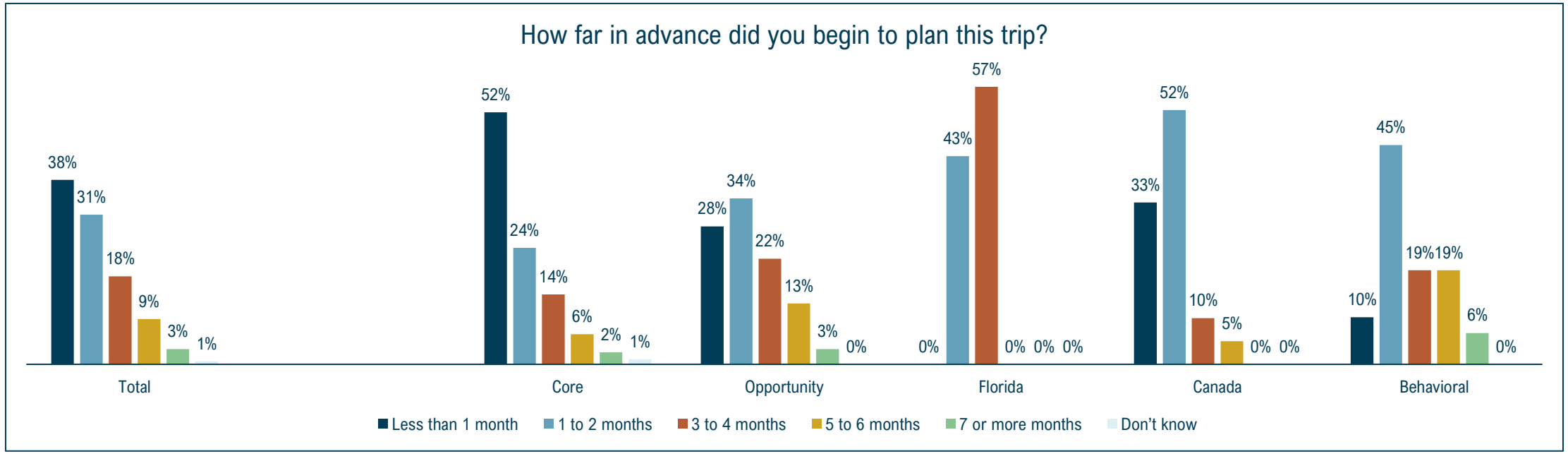
	Spring/Summer 2018	Spring/Summer 2019	Summer 2020	Spring/Summer 2021	Spring/Summer 2022	Spring/Summer 2023	Spring/Summer 2024	Spring/Summer 2025	Spring/Summer 2026
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,051	17,442,671	21,725,260	21,985,583
Ad Awareness	43%	44%	43%	41%	46%	50%	55%	48%	45%
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	9,952,385
Incremental Travel	6.50%	4.40%	3.10%	4.20%	4.60%	5.70%	4.50%	3.60%	5.63%
Incremental Trips	399,487	317,107	160,763	438,804	594,332	494,462	427,849	367,836	560,071
Avg. Trip Spending (among ad-aware visitors)	$804	$1,042	$1,053	$1,202	$1,312	$1,130	$1,244	$1,700	$1,399
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	$783,462,079
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	$3,482,466
ROI	$179	$182	$199	$222	$266	$228	$203	$207	$225
Avg. Taxable Trip Spending (among ad-aware visitors)	$598	$680	$603	$778	$882	$844	$919	$1,221	$1,089
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	$610,188,955
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	$51,866,062
Tax ROI	$11.99	$10.68	$10.28	$12.96	$15.22	$14.49	$12.77	$12.67	$14.89

New Hampshire Trip Specifics

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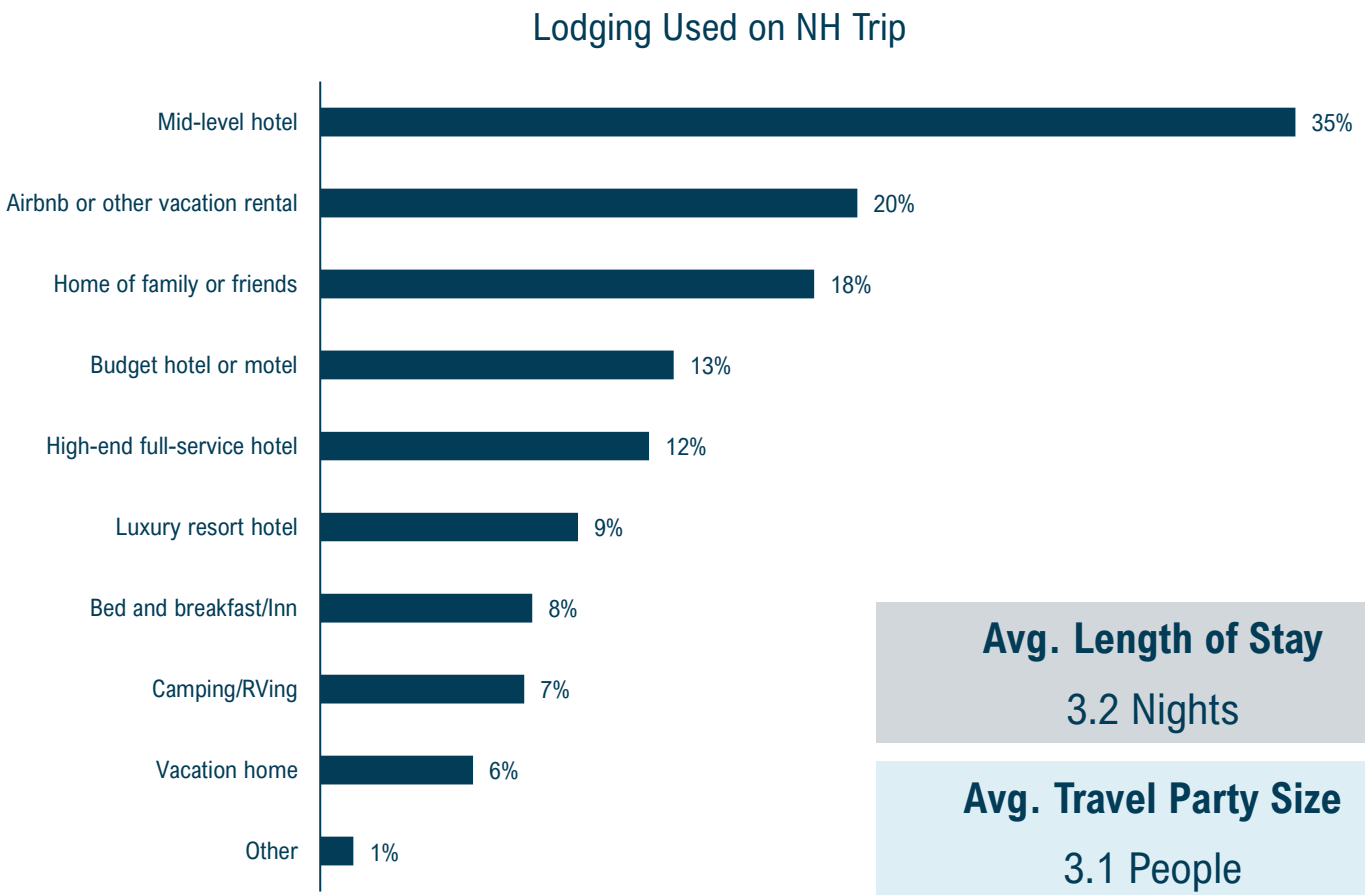
New Hampshire Trip Travel Planning

- New Hampshire trips are mostly planned in a window of two months or less. Travelers in the more distant opportunity markets and Florida, as well as the behavioral targets, have a longer planning period on average. Due to a limited sample of visitors, the market level results should be viewed more directionally.
- When planning flight times for ads, it is important to consider the longer planning periods in the more distant markets. Consumers in these markets will need time to make plans after seeing the advertising.



Travel Party, Length of Stay, and Lodging

- The average New Hampshire trip included a travel party of just over three people and lasted a little longer than three nights.
- This represents a slight decline from 3.8 people per travel party and 3.4 nights per trip during the same period in 2025, coinciding with the less optimal travel conditions this year.
- Travelers most frequently stayed at mid-level hotels (35%), though budget motels (13%), high-end, full-service hotels (12%), and luxury resort hotels (9%) were also commonly used.
- One in five visitors stayed in an Airbnb or another vacation rental, and just under one in five visitors stayed at the home of family or friends, representing another large chunk of trips.



Avg. Length of Stay

3.2 Nights

Avg. Travel Party Size

3.1 People

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New Hampshire Trip Activities

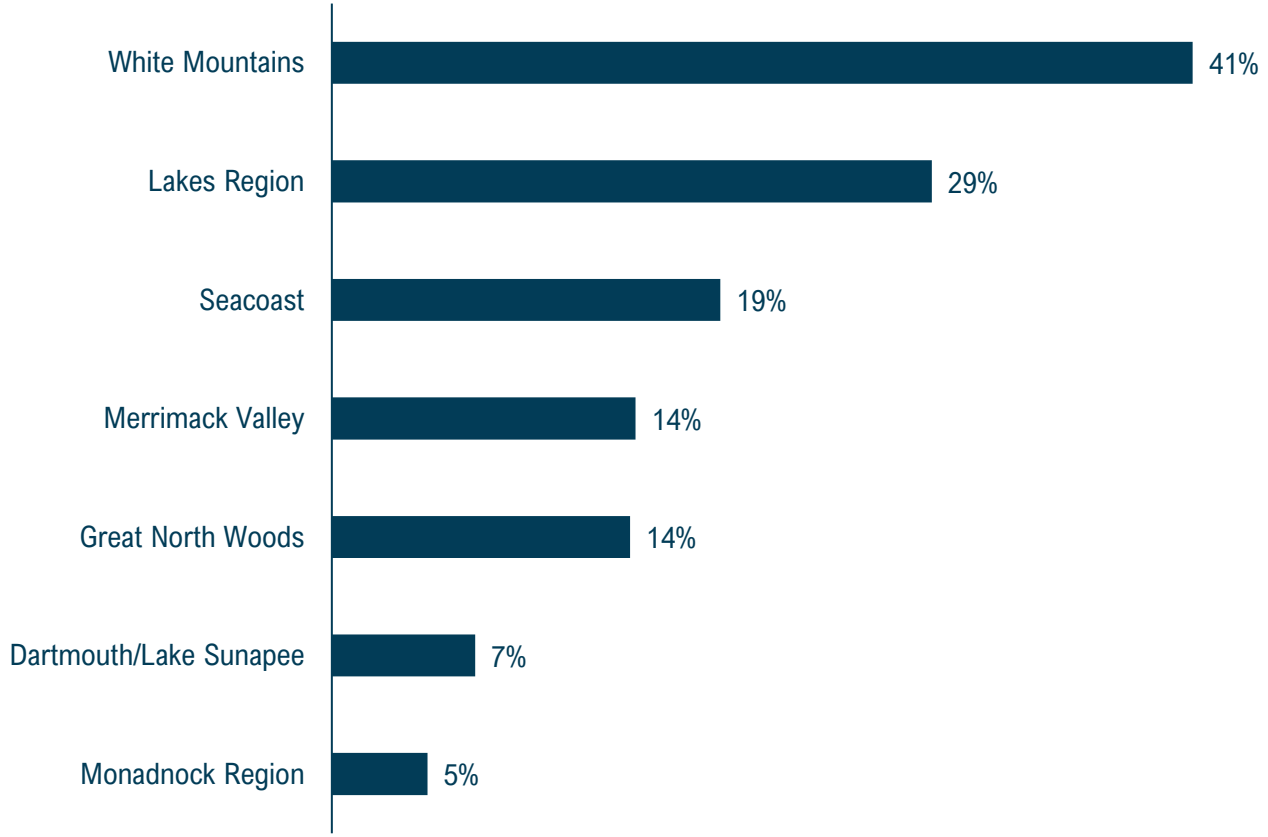
- Scenic drives were included in 50% of all trips, and 56% of those who took a scenic drive said that they were motivated to visit New Hampshire for that activity specifically. This means that 28% of all New Hampshire trips were motivated by scenic drives.
- Activities with lower participation and high motivation represent niche activities that could be used in more focused marketing efforts. These activities include winery tours, camping, festivals and fairs, plays and concerts, river rafting, horseback riding, and golf.
- The "other" category was highly motivating as well. Respondents who selected this option were asked to specify the activity with an open end, and the vast majority of these responses were related to going to the beach or an amusement park.

	Participate	Motivate	Net Motivation
Scenic drive	50%	56%	28%
Hiking or backpacking	28%	64%	18%
Shopping	55%	32%	17%
Dining at locally owned restaurants	51%	32%	16%
Visiting a state or national park	30%	46%	14%
Visiting historical sites	25%	44%	11%
Other	12%	90%	11%
Camping	13%	64%	8%
Attending a festival or fair	15%	47%	7%
Wildlife watching	22%	32%	7%
Visiting museums	19%	34%	6%
Sightseeing tour	19%	33%	6%
Attending a play or concert	11%	57%	6%
Winery tours	8%	47%	4%
Boating	12%	32%	4%
Canoeing or kayaking	14%	25%	4%
Bird watching	12%	28%	3%
Fishing	10%	33%	3%
Farmer's markets/U-picks/roadside stand	18%	17%	3%
River rafting	6%	46%	3%
Bicycling or mountain biking	8%	28%	2%
Horseback riding	5%	44%	2%
Farm to table dinner	9%	24%	2%
Golfing	5%	39%	2%
Attending performing arts (music/theater)	9%	19%	2%
Hunting	4%	29%	1%
Beer trail	7%	12%	1%
ATVing	4%	17%	1%
Visiting a noteworthy bar or nightclub	9%	8%	1%
Rock climbing	2%	25%	1%
None of these	1%	8%	0%

New Hampshire Regions Visited

- The White Mountains region was included in more than 40% of all New Hampshire trips, followed by the Lakes region, which was included in about 30% of trips.

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

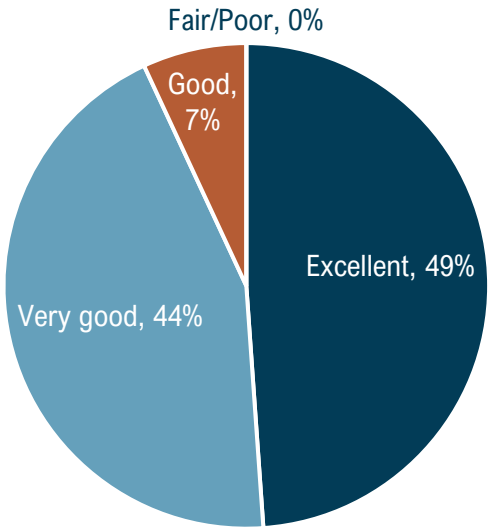


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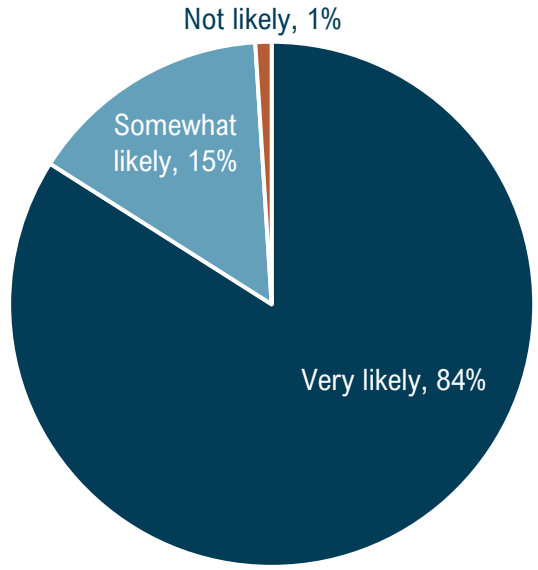
New Hampshire Trip Experience & Likelihood to Recommend

- New Hampshire visitors were overwhelmingly positive about their trip experience, with no fair or poor ratings.
- These positive trip experiences result in strong advocacy, with 84% of visitors saying they are very likely to recommend a trip to New Hampshire and only 1% unlikely.

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



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



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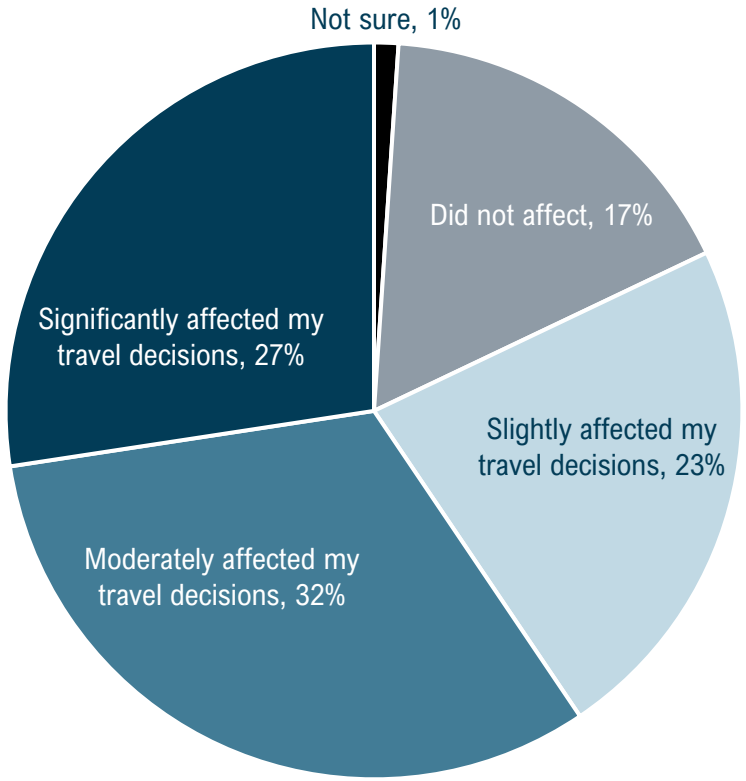
Appendix: Travel Conditions and Halo Attributes

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Impact of Current Economic Environment on Travel Decisions

- Only 17% of travelers say that transportation costs have not affected their recent travel decisions.
- Current costs are impacting the way travelers think about their next trip and how they plan for it, with more than a quarter of visitors saying current conditions are significantly impacting their decision making.
- On the next page, we explore how travelers are adjusting their plans.

To what extent have transportation costs (including gas, airfare, and other travel-related transportation expenses) affected your recent travel decisions?

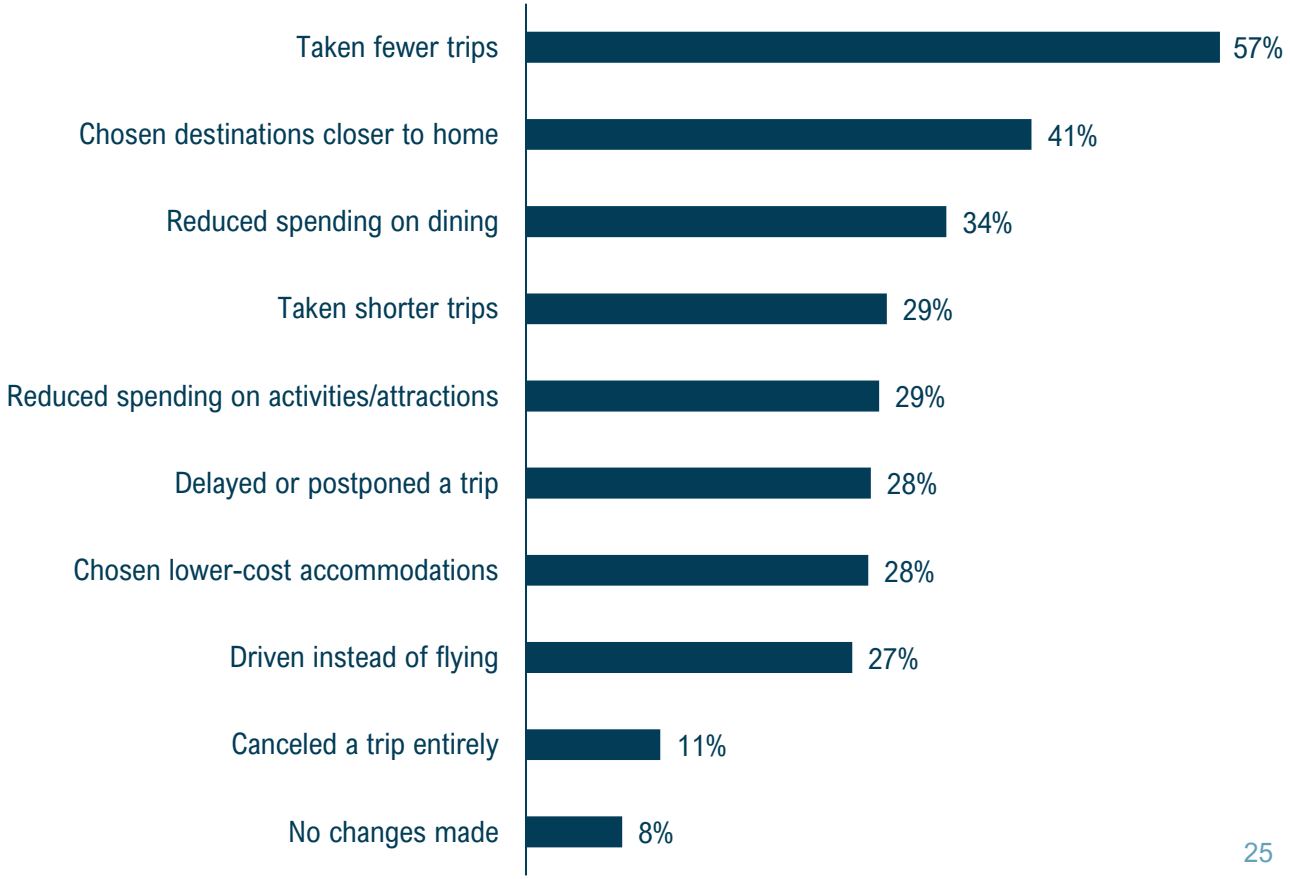


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Changes in Travel Decisions in Response to Transportation Costs

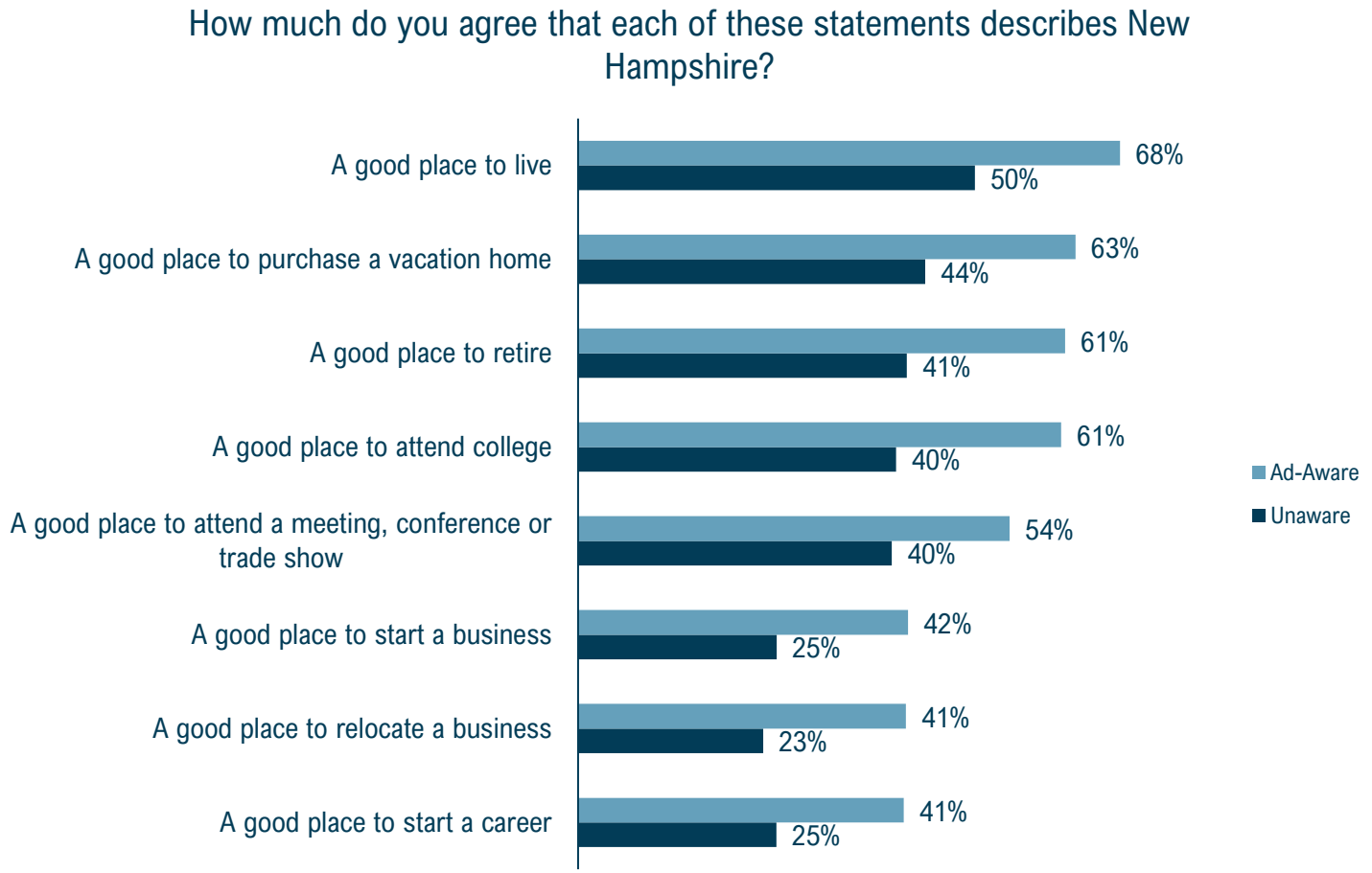
- Travelers who agreed that current transportation costs have led to changes in their recent travel decision making were asked how they changed their plans.
- Nearly 60% said that they are taking fewer trips this year, and another 41% indicated that they are choosing destinations closer to home. This helps to add context to the growth in trips from the more proximal core markets.

Which of the following changes have you recently made because of transportation costs? Please select all that apply.



Ad Impact on Halo Attributes

- While the advertising does not promote New Hampshire as a place to live and work, awareness is associated with stronger ratings on these halo perceptions.



Total Fiscal Year ROI

This section reviews the seasonal FY2025/2026 results and the total fiscal year combined results. The FY2025/2026 seasons include:

- Fall 2025
- Winter 2025/2026
- Spring/Summer 2026

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Fall 2025

- The fall 2025 campaign generated the most visitor spending and tax revenue of any fall campaign on record, with similar ROI despite a dramatic jump in media spend.
- It was the stronger impact among the behavioral target that made the increased media spend both effective and efficient.

	Fall 2022	Fall 2023	Fall 2024	Fall 2025	% Change
Target HHs	21,562,811	17,429,051	17,220,508	13,627,992	-21%
Ad Awareness	37%	43%	48%	48%	1%
Ad-Aware HHs	8,049,391	7,564,316	8,220,915	6,580,518	-20%
Incremental Travel	1.3%	1.4%	2.1%	3.6%	72%
Incremental Trips	105,635	106,641	175,396	237,922	36%
Avg. Trip Spending	$1,181	$973	$1,144	$1,444	26%
Ad-Influenced Trip Spending	$124,806,730	$103,739,534	$200,666,160	$343,531,738	71%
Media Investment	$226,338	$206,000	$342,584	$655,580	91%
ROI	$551	$504	$586	$524	-11%
Avg. Taxable Trip Spending	$827	$701	$851	$1,020	20%
Ad-Influenced Taxable Trip Spending	$87,401,514	$74,765,063	$149,289,383	$242,641,972	63%
Taxes Generated	$7,429,129	$6,355,030	$12,689,598	$20,624,568	63%
Tax ROI	$33	$31	$37	$31	-15%

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Winter 2025/2026

- Favorable snowfall conditions across New England – combined with weaker snow conditions in competing U.S. ski destinations – created a strong market opportunity for New Hampshire to capture incremental winter ski and snowboard travel demand during the 2025-2026 season.
- All together, the 2025-2026 winter campaign represented the most ad-influenced trips, visitor spending, and tax revenue generated in the past four years.

	Winter 2022-2023	Winter 2023-2024	Winter 2024-2025	Winter 2025-2026	% Change
Target HHs	5,519,065	4,474,498	4,998,863	5,192,337	4%
Ad Awareness	61%	56%	63%	72%	15%
Ad-Aware HHs	3,371,419	2,515,898	3,159,525	3,754,840	19%
Incremental Travel	2.8%	2.5%	2.4%	5.1%	114%
Ad-Influenced Trips	96,073	64,104	77,362	192,451	149%
Average Trip Spending	$1,492	$1,288	$1,599	$1,626	2%
Ad-Influenced Spending	$143,382,835	$82,593,685	$123,667,806	$312,888,300	153%
Media Investment	$406,766	$538,388	$371,670	$461,514	24%
ROI	$352	$153	$333	$678	104%
Avg. Taxable Trip Spending	$1,023	$1,037	$1,125	$915	-19%
Ad-Influenced Taxable Spending	$98,327,450	$66,445,164	$87,011,635	$176,093,208	102%
Taxes Generated	$8,849,470	$5,647,839	$7,395,989	$14,967,923	102%
Tax ROI	$22	$10	$20	$32	62%

SMARInsights

Spring/Summer 2026

- Although the campaign reached fewer traveling households this year, increased media investment drove higher exposure frequency. Combined with refreshed creative, this contributed to a strong incremental lift in travel and highly positive overall results.

	Spring/Summer 2023	Spring/Summer 2024	Spring/Summer 2025	Spring/Summer 2026	% Change
Target HHs	17,429,051	17,442,671	21,725,260	21,985,583	1%
Ad Awareness	50%	55%	48%	45%	-6%
Ad-Aware HHs	8,742,575	9,506,882	10,335,735	9,952,385	-4%
Incremental Travel	5.7%	4.5%	3.6%	5.6%	56%
Incremental Trips	494,462	427,849	367,836	560,071	52%
Avg. Trip Spending	$1,130	$1,244	$1,700	$1,399	-18%
Ad-Influenced Trip Spending	$558,680,848	$532,069,285	$625,224,798	$783,462,079	25%
Media Investment	$2,448,674	$2,618,377	$3,014,576	$3,482,466	16%
ROI	$228	$203	$207	$225	9%
Avg. Taxable Trip Spending	$844	$919	$1,221	$1,089	-11%
Ad-Influenced Taxable Trip Spending	$417,480,042	$393,363,150	$449,263,160	$610,188,955	36%
Taxes Generated	$35,485,804	$33,435,868	$38,187,369	$51,866,062	36%
Tax ROI	$14	$13	$13	$15	15%

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Total FY2025/2026 ROI

- Accounting for all FY2025/2026 campaigns, the advertising influenced $1.4 billion in visitor spending, $87 million in tax revenue, and ROI and tax ROI of $313 and $19, respectively.

	Fall 2025	Winter 2025/2026	Spring/Summer 2026	Total FY 2025/2026
Ad-Influenced Trips	237,922	192,451	560,071	990,444
Avg. Trip Spending (among ad-aware visitors)	$1,444	1,626	1,399	$1,454
Ad-Influenced Trip Spending	$343,531,738	312,888,300	783,462,079	$1,439,882,117
Avg. Taxable Trip Spending	$1,020	$915	$1,089	$1,039
Ad-Influenced Taxable Trip Spending	$242,641,972	$176,093,208	$610,188,955	$1,028,924,135
Taxes Generated	$20,624,568	$14,967,923	$51,866,062	$87,458,553
Media Investment	$655,580	$461,514	$3,482,466	$4,599,560
ROI	$524	$678	$225	$313
Tax ROI	$31	$32	$15	$19

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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	Total Fiscal Year 2025/2026
Influenced Trips	604,055	636,170	555,681	529,505	743,727	696,170	598,594	620,594	990,444
Avg. Trip Spending	$839	$900	$1,103	$1,101	$1,288	$1,188	$1,200	$1,530	$1,454
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	$1,439,882,117
Avg. Taxable Trip Spending	$586	$583	$736	$751	$871	$866	$893	$1,105	$1,039
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	$1,028,924,135
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	$87,458,553
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	$4,599,560
ROI	$204	$223	$397	$197	$278	$268	$214	$255	$313
Tax ROI	$13	$13	$24	$12	$16	$17	$14	$16	$19

- Total FY2025/2026 ROI is the second-strongest on record, even with the largest media investment. Effective behavioral targeting drove a strong fall result, the winter campaign capitalized on good snow conditions, and refreshed creative and strong frequency resulted in strong summer results.

Appendix: Questionnaire

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Questionnaire

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New Hampshire Tourism
2026 Spring/Summer Ad Effectiveness Wave 2

Market Designation	Markets	Surveys
Core	Boston (Manchester) DMA	300
	Portland/Auburn DMA	100
	Providence/New Bedford DMA	100
Opportunity	Philadelphia, DMA	200
	State of Connecticut	100
	Dutchess, Orange, Ulster, Westchester, Rockland, Sullivan Counties NY	100
Florida	Orlando, Tampa, Ft. Myers DMAs	300
Canada	Montreal	300
Behavioral Targeted States	DC DMA, GA, IL, KY, MA (minus Boston, Providence-New Bedford DMAs), MI, NC, NJ (minus Philadelphia DMA), NY (minus select counties), OH, PA (minus Philadelphia), VA, VT	800
	Total	2,300

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		

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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

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					

SMARInsights

Visiting a museum					
Backpacking or hiking					
Staying in luxury accommodations					

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	Somewh at likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

Questionnaire

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 2026? How many trips did you take to or within each state in 2026?

[ROTATE]	States visited in 2026	Number of visits in 2026
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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

T2. When in 2026 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.

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
- Electic 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

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	

Questionnaire

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

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	
Food and beverage service	
Food stores	
Local transportation & gasoline	

Arts, entertainment, and recreation	
Retail sales	
Visitor air	
Other	
Total	SHOW

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

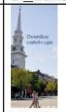
Very likely
Somewhat likely
Not likely

AD AWARENESS MODULE

DO AIA FOR THE VIDEO SECTION ON EACH CAMPAIGN
Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

PRIMARY SUMMER

DIGITAL:
Behavioral

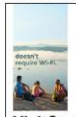
 VisitSummer26_Behavioral_Luxury_V1	 VisitSummer26_Behavioral_Luxury_V2	 VisitSummer26_Behavioral_V1_Culture
 VisitSummer26_Behavioral_V1_Hiking	 VisitSummer26_Behavioral_V2_Culture	 VisitSummer26_Behavioral_V2_Hiking

Canada

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Standard Display\Canada\SummerVisit26_Canada_French_300x600.zip



Core_Opp
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Standard Display\Core_Opp

 **VisitSummer26_Family V1**	 **VisitSummer26_Family V2**
 **VisitSummer26_Friends_V1**	 **VisitSummer26_Friends_V2**

Florida
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Standard Display\Florida

 **Florida_V1**	 **Florida_V2**

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:

Questionnaire

SMARInsights

All Markets



https://vimeo.com/1199792286 https://vimeo.com/1199792440
https://vimeo.com/1199788621

RANDOMLY SHOW 1 - 10SEC VIDEO



https://vimeo.com/1199800838 https://vimeo.com/1199800716
https://vimeo.com/1199800715 https://vimeo.com/1199800725
https://vimeo.com/1199800718

Core_Opp and Canada



https://vimeo.com/1199788627 https://vimeo.com/1199788626

Florida



https://vimeo.com/1199788623

Core_Opp and Florida

SMARInsights



https://vimeo.com/1199800526

TV. Have you seen this or a similar ad before now?
Yes
No

SOCIAL ADS:
ASK IF S5 > 0

Behavioral
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Paid Social\Behavioral\USE



Canada
English
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Paid Social\Canada\English\USE



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French
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Paid Social\Canada\French\USE



Core_Opp
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Paid Social\Core:Opp\USE



Florida
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Paid Social\Florida\USE



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

OOH:

CORE_OPP

Questionnaire

SMARInsights

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\OOH\Core_Opp\USE



FLORIDA

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\OOH\Florida\USE



Florida-V1.jpg Florida-V2.jpg Florida-V3.jpg Florida-V4.jpg

BOSTON

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Unique OOH\Boston\USE



4345933_Visit NH_Boston_Aquarium Windows_00005P1 A_2026-04-27-2.jpg 4345933_Visit NH_Boston_Aquarium Windows_00005P1 A_2026-04-27-5.jpg Fenway.jpg Screenshot 2026-05-29 at 10.53.31 AM.jpg



https://vimeo.com/1090502249

PHILADELPHIA

SMARInsights

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Unique OOH\Philadelphia\USE



Have you seen this or a similar ad before now?
Yes
No

PRINT:
SHOW TO CORE_OPP MARKETS ONLY
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Print



Yankee-Magazine MockUp copy.jpg

BOSTON GLOBE:
SHOW TO CORE_OPP MARKETS ONLY

I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Boston Globe

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Screenshot 2026-06-08 145948.jpg



Native Newsletter.jpg

Have you seen this or a similar print ad before now?
Yes
No

FIFA, AMERICA 250

CORE_OPP

TV:



https://vimeo.com/1199828780

FOR ALL VIDEOS LONGER THAN 30SECS, ALLOW NEXT BUTTON TO APPEAR AT 30SECS

Questionnaire

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https://vimeo.com/1199836659 https://vimeo.com/1199836660
https://vimeo.com/1199836602

TV. Have you seen this or a similar ad before now?
Yes
No

PRINT:

BOSTON GLOBE:
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\FIFA\Boston Globe



I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\America 250\Boston Globe



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

SMARInsights

Yes
No

SOCIAL ADS:
ASK IF S5 > 0
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\FIFA\Paid Social\USE



I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\America 250\Paid Social\USE



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

Choose NH
CORE_OPP-excluding NH

SMARInsights



https://vimeo.com/1199843847

TV. Have you seen this or a similar ad before now?
Yes
No

PRINT:
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Choose NH\Boston Globe



Have you seen this or a similar print ad before now?
Yes
No

Questionnaire

SMARInsights

SOCIAL ADS:
ASK IF S5 > 0
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Choose NH\Paid Social\USE



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

Proud to be 603
NH Only

TV:
FOR ALL VIDEOS LONGER THAN 30SECS, ALLOW NEXT BUTTON TO APPEAR AT 30SECS
RANDOMLY SHOW TWO 30SEC AND ONE 15SEC VIDEO.



https://vimeo.com/1199856835 https://vimeo.com/1199856836
https://vimeo.com/1199856600

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https://vimeo.com/1199856598 https://vimeo.com/1199856601
https://vimeo.com/1199856597

TV. Have you seen this or a similar ad before now?
Yes
No

TRANSPORTATION COST MODULE

Tc1. To what extent have transportation costs (including gas, airfare, and other travel-related transportation expenses) affected your recent travel decisions?

Significantly affected my travel decisions
Moderately affected my travel decisions
Slightly affected my travel decisions
Not affected my travel decisions
Not sure

ASK TC2 IF AT LEAST SLIGHTLY AFFECTED:

TC2. Which of the following changes have you recently made because of transportation costs? Please select all that apply.

Chosen destinations closer to home
Taken fewer trips
Taken shorter trips
Driven instead of flying
Chosen lower-cost accommodations
Reduced spending on dining

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Reduced spending on activities/attractions
Delayed or postponed a trip
Canceled a trip entirely
No changes made

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

Questionnaire

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$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 idenity …?

Male
Female
Other
Prefer not to answer