



New Hampshire
LIVE FREE

2023 Fall
Advertising Effectiveness Research

December 2023

SMARInsights

Background & Objectives

- In fall 2023, the New Hampshire Division of Travel and Tourism Development (DTTD) continued to run “Discover Your New” advertising in core, long drive, and Canadian markets. This campaign has been running since 2020.
- DTTD has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess the effectiveness of the 2023 fall advertising.
- This research wave focuses on the impact of the 2023 fall advertising and the return on the media investment.
- The specific objectives of this seasonal advertising effectiveness research include:
 - Measure awareness of the fall 2023 advertising;
 - Evaluate the efficiency of the media buy through SMARInsights’ cost-per-aware household benchmarking;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights’ benchmarking;
 - Assess the ability of the advertising to influence New Hampshire fall travel;
 - Quantify ad-influenced fall trips, visitor spending, and ROI;
 - Review the results by market group; and
 - Forward insights into future refinement of the marketing.

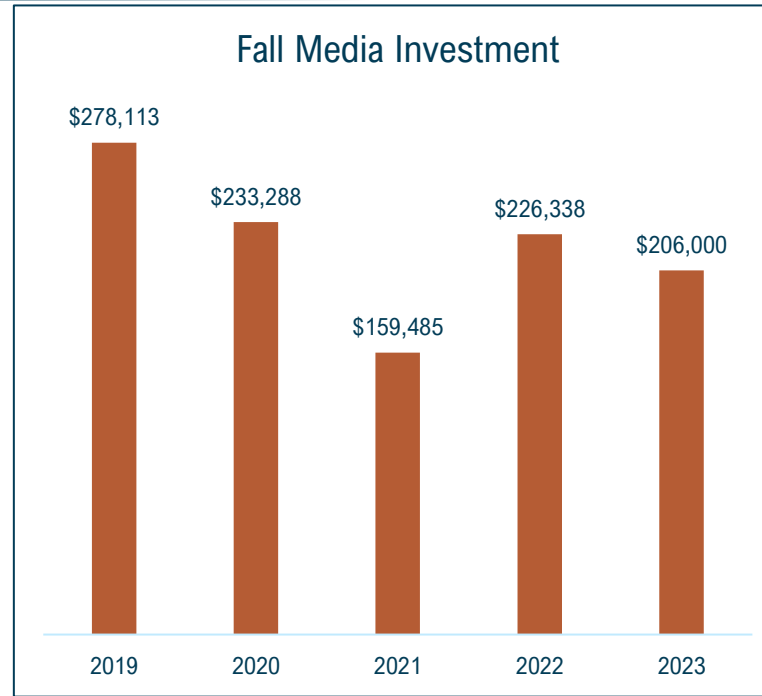
Methodology

- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. 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 are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents must be household 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 2023 fall advertising was aimed at existing northeastern core markets, more distant “long drive” markets, and Canadian markets.
- It is also important to note that the quantity of states comprising the long drive markets was reduced from 2022 and now includes only Eastern Pennsylvania and New Jersey. In 2022, the long drive group included those two markets plus western Pennsylvania, Delaware, Maryland, and Virginia. For the Canadian markets, Toronto was removed and replaced with Quebec City. Ad spending by market is provided on the following page.
- A total of 1,715 surveys were completed in December 2023. 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		Completed Surveys
Core	MA	201
	RI	100
	CT	101
	ME	100
	NH	100
	NY	300
Total Core		902
Long Drive	NJ	203
	Eastern PA	310
Total Long Drive		513
Canadian	Quebec City	150
	Montreal	150
Total Canadian		300
Total		1,715

Fall Campaign Overview

Market	Digital Banner/Video	Social Media Banner/Video	Total
MA	\$8,528	\$9,689	\$18,217
RI	\$8,528	\$6,589	\$15,117
CT	\$8,528	\$6,589	\$15,117
ME	\$8,528	\$9,689	\$18,217
NH	\$8,528	\$9,689	\$18,217
NY	\$8,528	\$6,589	\$15,117
Total Core	\$51,167	\$48,833	\$100,000
Eastern PA	\$24,417	\$12,083	\$36,500
NJ	\$24,417	\$12,083	\$36,500
Total Long Drive	\$48,833	\$24,167	\$73,000
Canada	\$15,000	\$18,000	\$33,000
Total	\$115,000	\$91,000	\$206,000



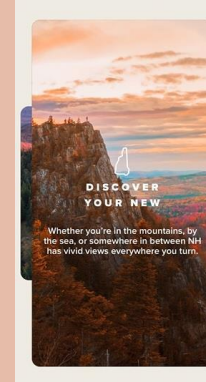
- DTTD has been running “Discover Your New” advertising since 2020.
- The fall 2023 campaign included digital and social media video and banner advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The fall 2023 media investment was smaller than in 2022 but larger than the 2021 investment.

Samples of Creative

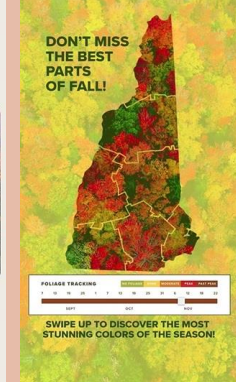
Fall :30 Video



Fall Landscapes Video



Foliage Tracker Video



Visitors Guide Video



Digital Banner



Social Media Banner



Insights

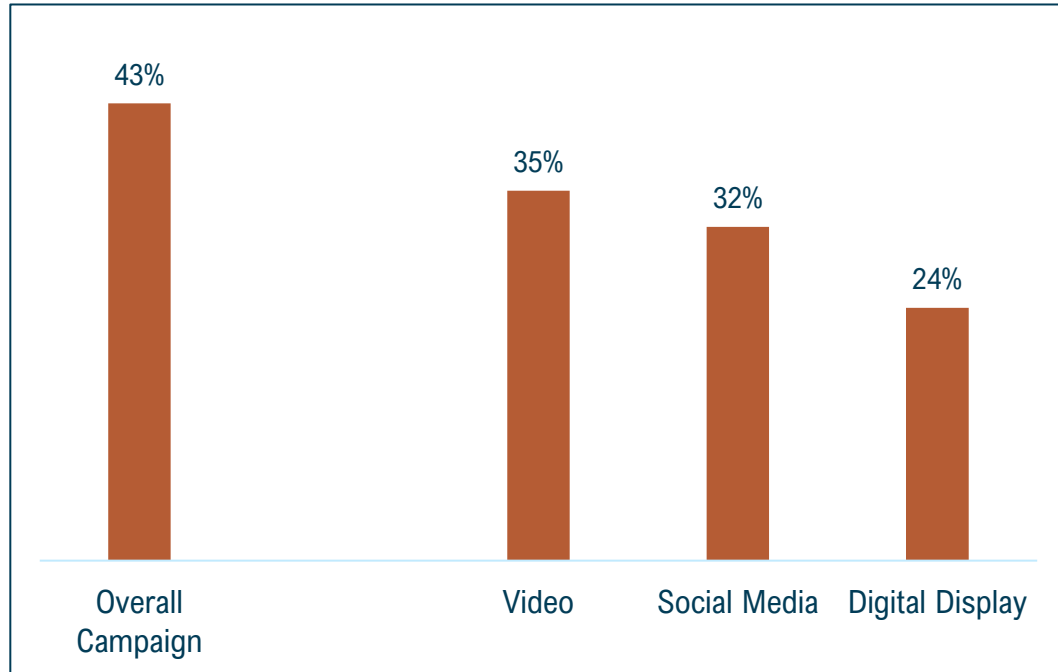
The fall “Discover Your New” advertising continues to efficiently reach target households, resonate with consumers, influence New Hampshire leisure travel, and produce a positive ROI. Key insights from this fall 2023 research include:

- The fall 2023 advertising generated 43% awareness, reaching about 7.6 million households in the core, long drive, and Canadian markets.
- DTTD continues to implement remarkably efficient media as indicated by a low cost per aware household (\$0.03) compared to the industry benchmark of \$0.51. This efficiency indicates an opportunity to expand into more/new markets to broaden advertising reach and influence. DTTD did the opposite this year, targeting fewer markets than during the past two years.
- The awareness percentage increased compared to last fall (37%), but targeting fewer markets resulted in about half a million fewer ad-aware households.
- Boomers remain difficult to reach given the media fragmentation resulting from cord cutting and the proliferation of streaming services. Even so, awareness among Boomers increased from 27% last year to 39% this year.
- There are no signs of creative wear out based on the evaluative creative ratings. In fact, the fall “Discover Your New” ratings are at peak levels since launching in 2020. We typically begin to see signs of wear out in the fourth or fifth year of a campaign.
- Canadians are less positive toward the advertising than those in the U.S. target markets, highlighting an opportunity to produce creative that is more appealing to our neighbors to the north.
- The fall 2023 advertising ultimately influenced about 107,000 New Hampshire trips, with most of these coming from the core markets. There were no ad-influenced trips from Canada this fall due to a higher baseline rate of travel resulting from fewer travel restrictions post-COVID. Canada should be monitored in the future rather than red-flagged for one year of no incremental travel.
- The quantity of ad-influenced trips is on par with fall 2022 and greater than fall 2020 and 2021. Ultimately, the fall 2023 advertising returned \$504 in visitor spending and \$31 in tax revenue for each \$1 invested in the advertising media.
- The advertising also seems to be driving travel to the more remote (northern/western) parts of the state.

Ad Awareness

SMARInsights

Fall 2023 Ad Awareness Overall and by Medium



Target HHs 17,429,051

Ad Awareness 43%

Ad-Aware HHs 7,564,316

Media Investment \$206,000

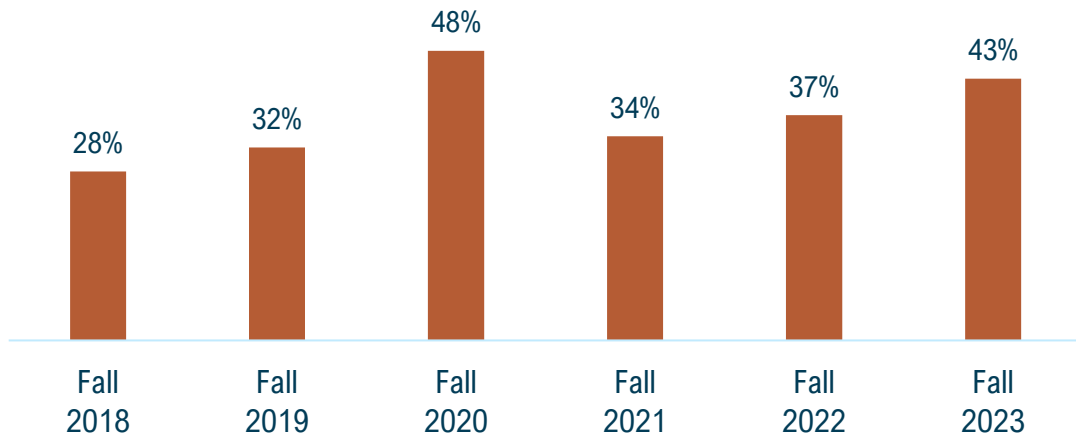
Cost per Aware HH \$0.03

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

- The fall 2023 advertising generated 43% awareness, reaching about 7.6 million target market households. The video advertising generated the highest awareness (35%), followed by social media (32%) and digital display (24%).
- DTTD continues to implement remarkably efficient media buys (see next slide), as indicated by a low cost per aware household. This efficiency could indicate an opportunity to expand into new markets to broaden advertising reach and influence.

Fall Ad Awareness Tracking

Overall Campaign Awareness

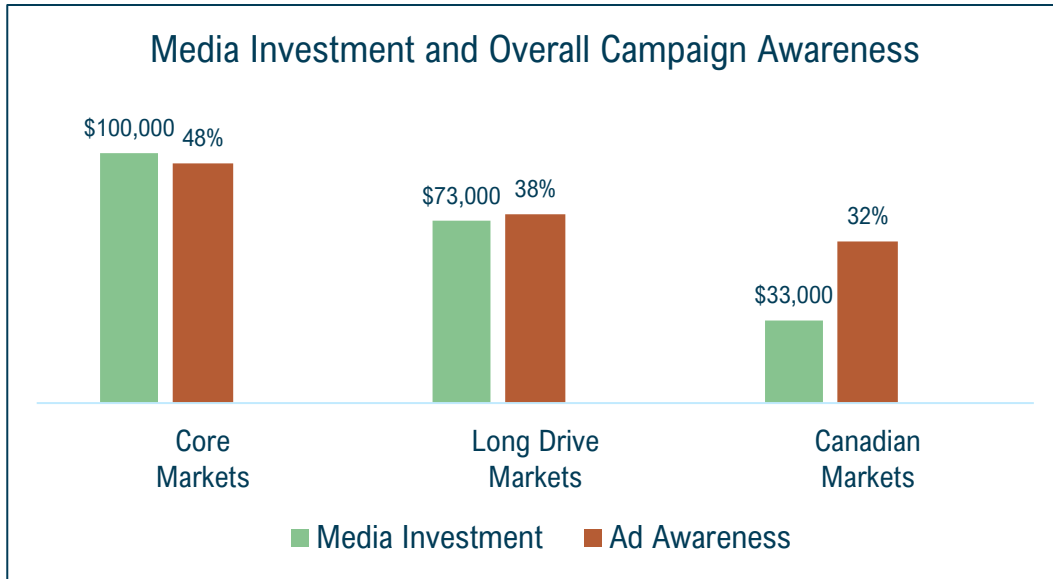


	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023
Target HHs	18,270,009	19,205,673	9,612,930	25,578,115	21,562,811	17,429,051
Ad Awareness	28%	32%	48%	34%	37%	43%
Ad-Aware HHs	5,185,047	6,150,380	4,641,103	8,656,969	8,049,391	7,564,316
Media Investment	\$305,338	\$278,113	\$233,288	\$159,485	\$226,338	\$206,000
Cost per Aware HH	\$0.06	\$0.05	\$0.05	\$0.02	\$0.03	\$0.03

- The level of ad awareness in fall 2023 is the second highest of the past several fall campaigns.
- While the awareness percentage increased compared to last fall, targeting fewer markets results in about half a million fewer ad-aware households.

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

Fall 2023 Ad Awareness by Market Group

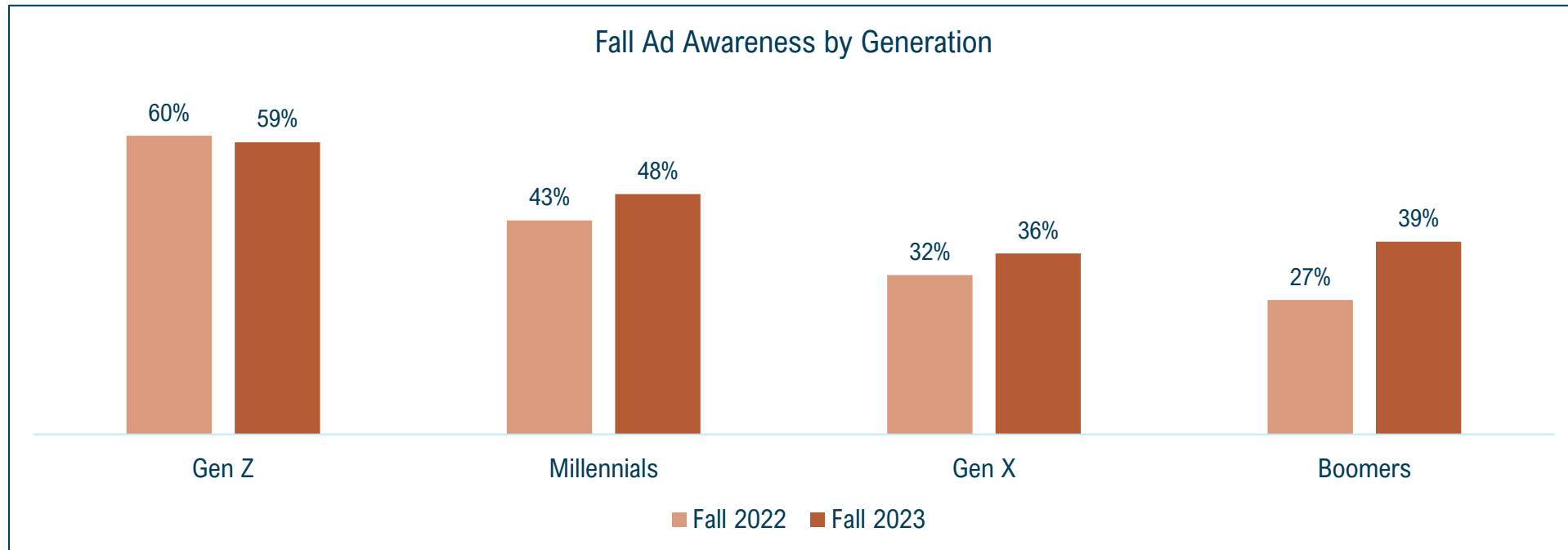


	Core Markets	Long Drive Markets	Canadian Markets
Target HHs	10,039,596	6,485,136	904,319
Ad Awareness	48%	38%	32%
Ad-Aware HHs	4,819,451	2,452,469	292,396
Media Investment	\$100,000	\$73,000	\$33,000
Cost per Aware HH	\$0.02	\$0.03	\$0.11

- Fall 2023 ad awareness is highest in the core markets. This large market group accounts for nearly two-thirds of ad-aware households.
- The level of ad awareness across markets correlates to the market-level media investment.
- Based on cost per aware household compared to the benchmark, the media investment is efficient all markets.

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

Fall Ad Awareness by Generation



- Recent reporting has revealed that media fragmentation, cord cutting, and the proliferation of streaming services have made it difficult to reach older consumers.
- This fall, ad awareness remains higher among younger consumers than among older consumers – but compared to last fall, the greatest gains in awareness are seen among the older consumers.

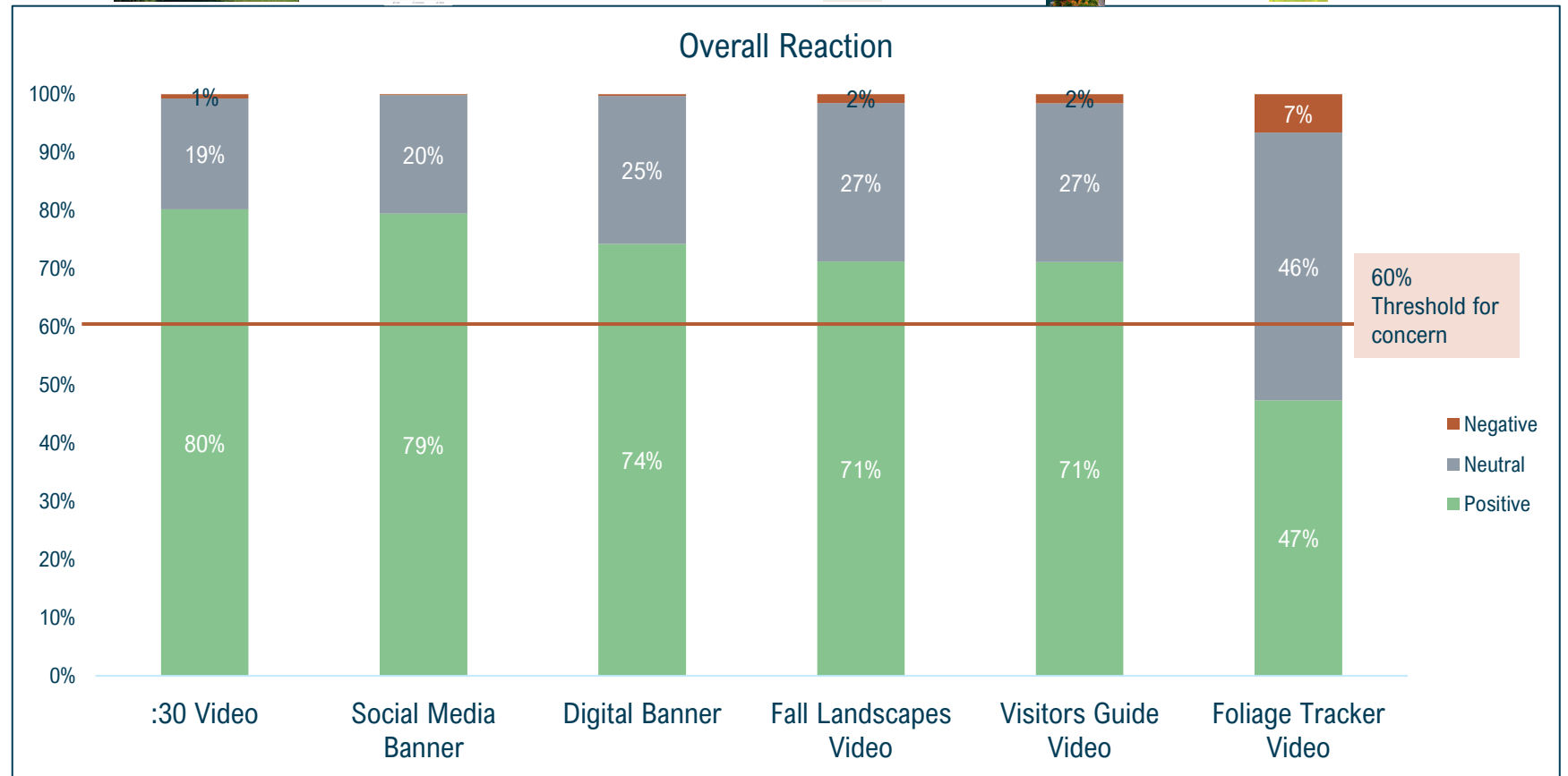
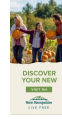
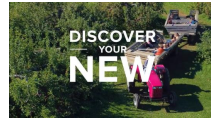
Creative Ratings



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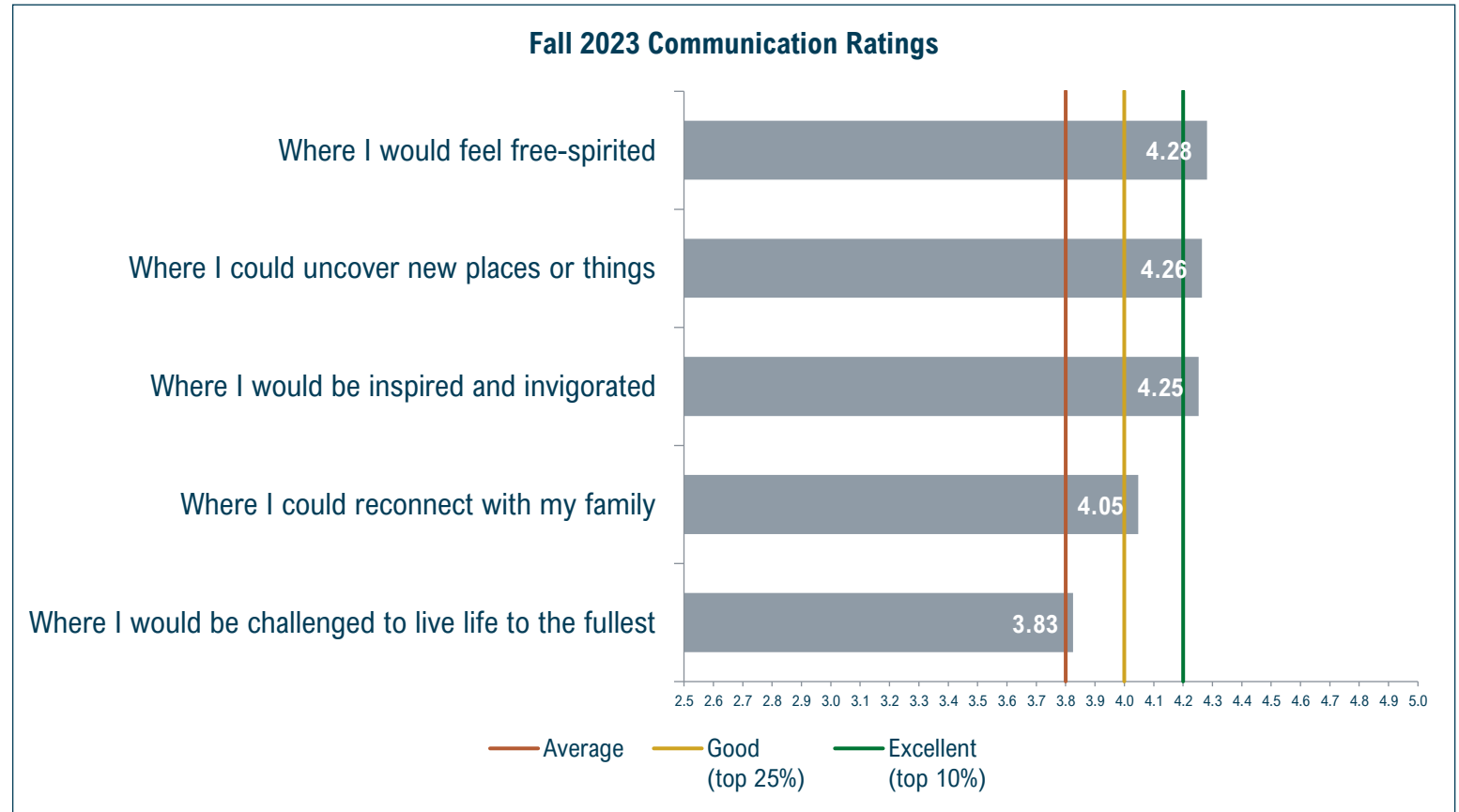
Fall 2023 Overall Reaction

- Most leisure travelers have a positive reaction to most of the fall 2023 creative assets tested.
- The exception is the Foliage Tracker video. Those who were negative about this ad indicate that it is boring or doesn't say/show enough.



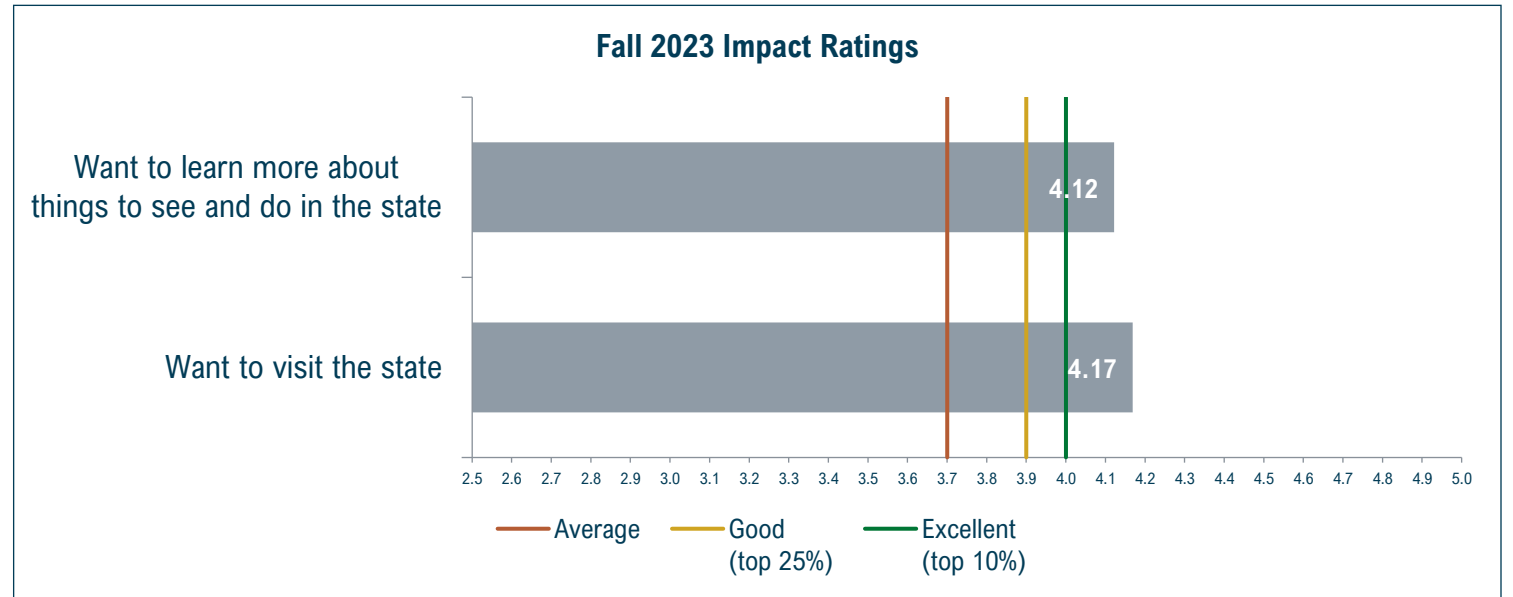
Fall 2023 Communication Ratings

- The fall 2023 “Discover Your New” campaign excels at communicating *free spirited, new places or things*, and *inspired/invigorated*.
- The only average rating relates to *challenging travelers to live life to the fullest*. This is a difficult message to communicate, as this has been the lowest-rated communication attribute over the past few years (the ratings over the past three years are shown later in this section).



Fall 2023 Impact Ratings

- From this evaluative ratings standpoint, the fall 2023 “Discover Your New” advertising effectively generates interest in visiting New Hampshire.



Fall 2023 Ratings by Market Group

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

- The fall 2023 “Discover Your New” ads effectively communicate key messages and generate interest in New Hampshire travel across market groups.
- But there is an opportunity to produce advertising that resonates more strongly (reaches the “excellent” threshold) with Canadians.

Communication Attributes	Core Markets	Long Drive Markets	Canadian Markets
Where I would feel free-spirited	4.30	4.27	4.17
Where I would be inspired and invigorated	4.30	4.21	4.05
Where I could uncover new places or things	4.26	4.30	4.03
Where I could reconnect with my family	4.07	4.02	4.03
Where I would be challenged to live life to the fullest	3.82	3.83	3.82

Impact Attributes	Core Markets	Long Drive Markets	Canadian Markets
Want to visit the state	4.22	4.12	3.91
Want to learn more about things to see and do in the state	4.14	4.13	3.87

Fall 2023 Ratings by Generation

- Gen Z and Boomers are less positive about the ads than Millennials and Gen X. That said, the oldest and youngest travelers still give the ads good marks.
- The ratings among Boomers are actually stronger than SMARInsights typically sees with this group. Boomers are not only difficult to reach, but they are also generally less receptive to tourism advertising messages.

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

Communication Attributes	Gen Z	Millennials	Gen X	Boomers
Where I would feel free-spirited	4.24	4.38	4.23	4.22
Where I could uncover new places or things	4.15	4.33	4.25	4.23
Where I would be inspired and invigorated	4.12	4.36	4.20	4.23
Where I would be challenged to live life to the fullest	3.86	3.88	3.78	3.77
Where I could reconnect with my family	3.79	4.15	4.06	3.98

Impact Attributes	Gen Z	Millennials	Gen X	Boomers
Want to visit the state	4.19	4.29	4.11	4.05
Want to learn more about things to see and do in the state	4.06	4.28	4.06	3.99

Tracking “Discover Your New” Ratings

- We see no signs of wear out from this evaluative ratings perspective.
- Ad wear out usually begins to occur at the four or five year mark. Given that the “Discover Your New” advertising is four years old, it is encouraging that the communication ad impact ratings are at all-time highs.

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

Communication Attributes	Fall 2020	Fall 2021	Fall 2022	Fall 2023
Where I could uncover new places or things	4.19	4.22	4.06	4.26
Where I would feel free-spirited	4.21	4.17	4.16	4.28
Where I would be inspired and invigorated	4.13	4.07	4.03	4.25
Where I could reconnect with my family	4.01	3.92	4.03	4.05
Where I would be challenged to live life to the fullest	3.81	3.70	3.67	3.83

Impact Attributes	Fall 2020	Fall 2021	Fall 2022	Fall 2023
Want to visit the state	4.04	4.02	3.96	4.17
Want to learn more about things to see and do in the state	3.97	4.02	3.95	4.12

Advertising Influence & ROI



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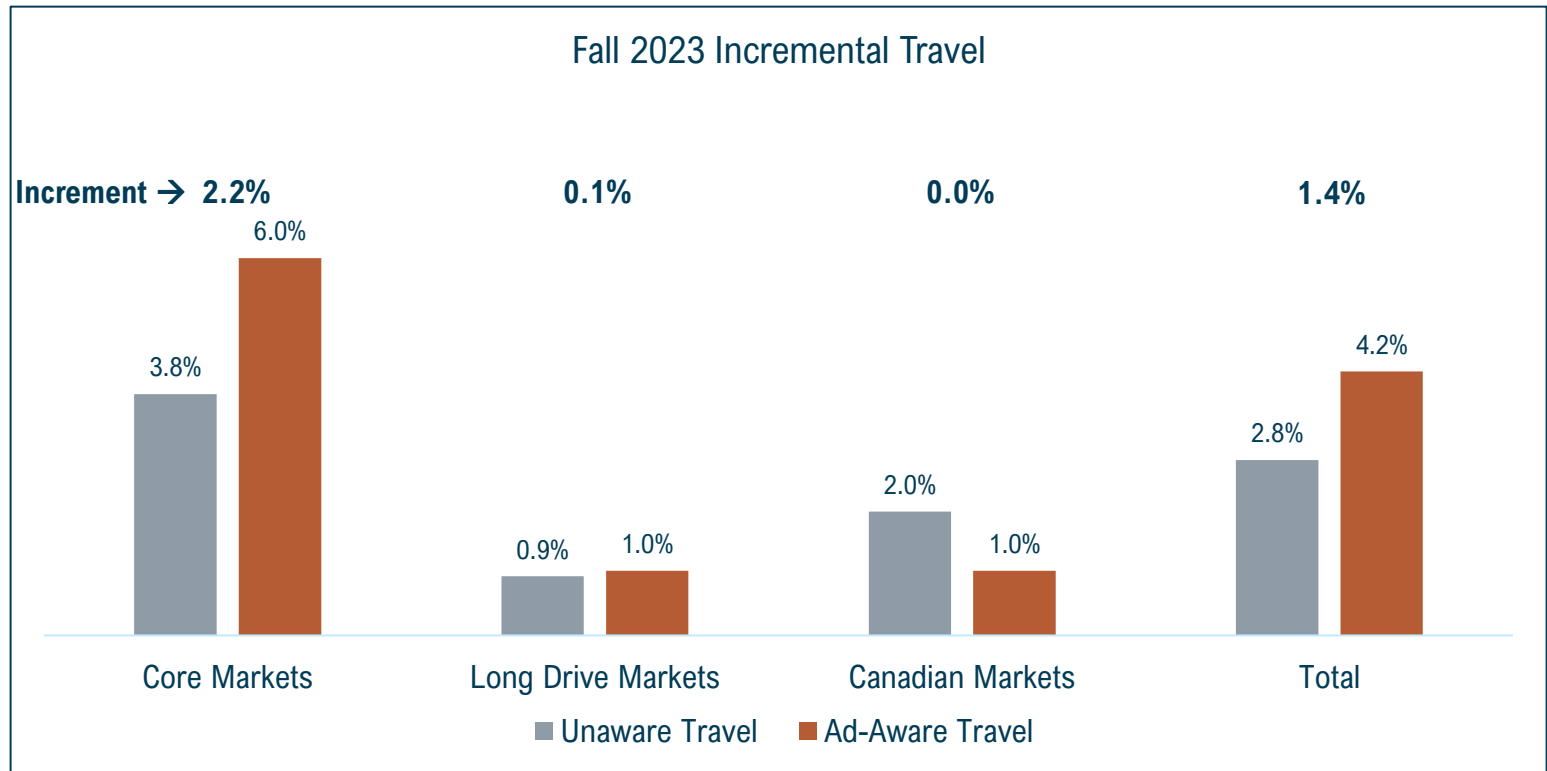
Incremental Travel Review

- SMARInsights' methodology for measuring advertising impact relies on establishing a base rate of travel. Certainly, New Hampshire travel would occur in the absence of advertising. Thus, not all travel, or even travel by ad-aware households, is attributable to the ads. Rather, the level of travel among unaware consumers is considered the base rate of travel that would occur without any advertising influence. Any travel above that baseline 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 2023 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 April 2023 through September 2023. Accounting for travel in only October and November in this fall wave prevents double-counting.



Fall 2023 Incremental Travel

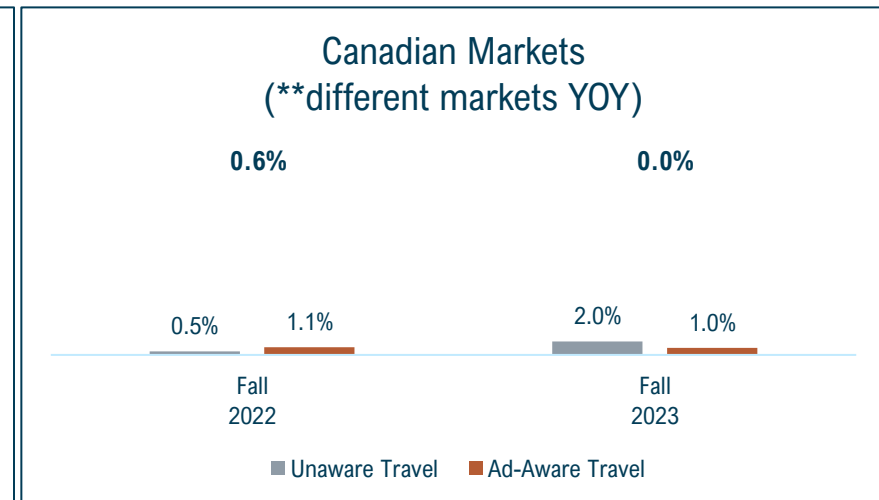
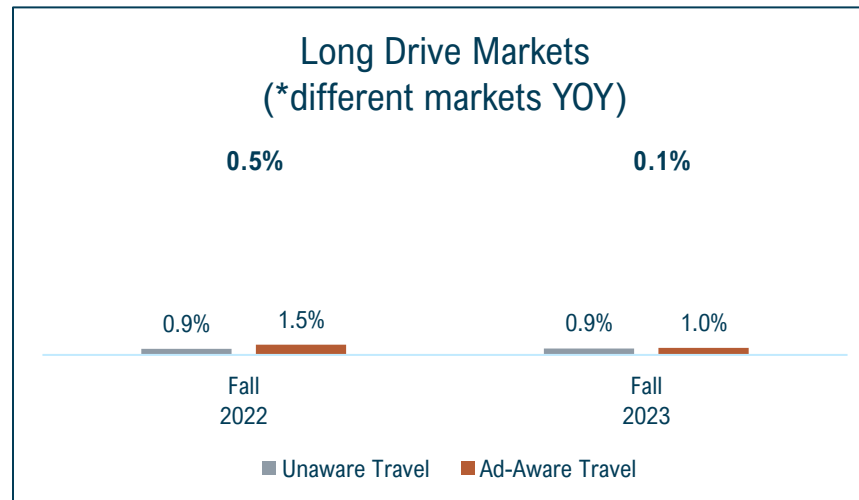
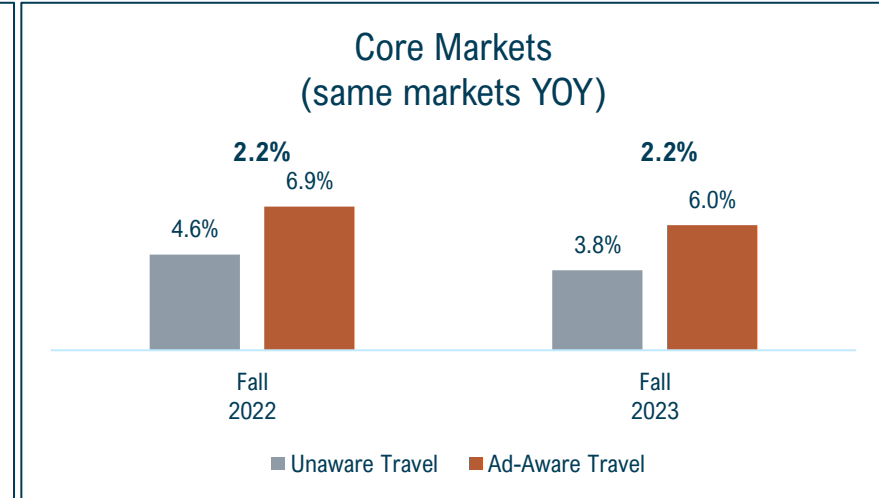
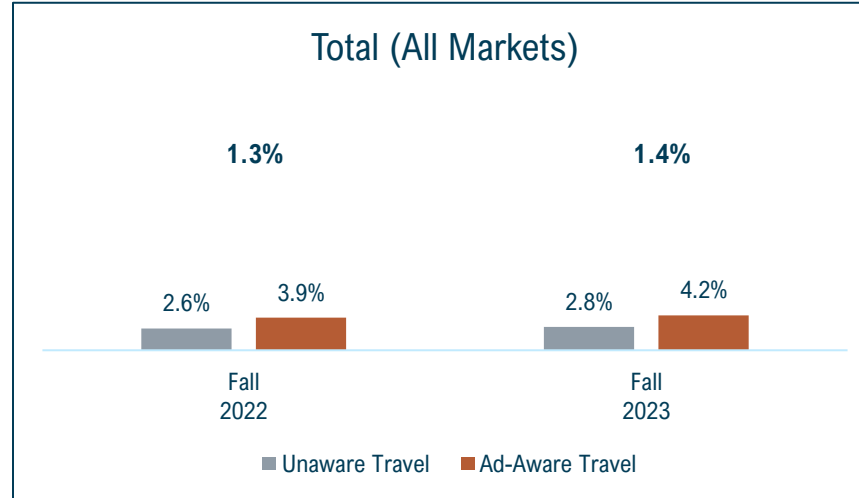
- The fall 2023 “Discover Your New” advertising influenced New Hampshire leisure travel from the core and long drive markets, but not from the Canadian markets. And the level of incremental travel from the long drive markets is quite small.
- In total, the level of incremental travel in fall 2023 is 1.4%.



Incremental Travel Change by Market & Overall

*2022 Long Drive	*2023 Long Drive	**2022 Canadian	**2023 Canadian
NJ	NJ	Toronto	Quebec City
PA	Eastern PA	Montreal	Montreal
DE			
MD			

- The overall level of incremental travel is essentially unchanged year-over-year despite a decline in the long drive markets and no incremental travel from the Canadian markets. Last year, the long drive markets included more markets/households and thus contributed more to the overall results (see next slide).
- In Canada, the baseline of travel increased in 2023 as travel restrictions are gone post-COVID. This prevented ad-influenced travel from Canada this year.



Incremental Trips Change by Market

<i>Fall 2022</i>	Core Markets	Long Drive Markets	Canadian Markets	Total
Target HHs	9,286,327	10,150,867	2,125,618	21,562,811
Ad Awareness	40%	36%	32%	37%
Ad-Aware HHs	3,700,811	3,663,928	684,652	8,049,391
Incremental Travel	2.2%	0.5%	0.6%	1.3%
Incremental Trips	82,081	19,467	4,086	105,635

<i>Fall 2023</i>	Core Markets	Long Drive Markets	Canadian Markets	Total
Target HHs	10,039,596	6,485,136	904,319	17,429,051
Ad Awareness	48%	38%	32%	43%
Ad-Aware HHs	4,819,451	2,452,469	292,396	7,564,316
Incremental Travel	2.2%	0.1%	0.0%	1.4%
Incremental Trips	104,421	2,219	0	106,641

- The fall 2022 and fall 2023 advertising campaigns each influenced just over 100,000 New Hampshire trips.

Fall 2023 Ad-Influenced Visitor Spending & ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	104,421	2,219	0	106,641
Avg. Trip Spending (among ad-aware visitors)	\$954	\$1,837	\$2,236	\$973
Ad-Influenced Trip Spending	\$99,661,803	\$4,077,731	\$0	\$103,739,534
Media Investment	\$100,000	\$73,000	\$33,000	\$206,000
ROI	\$997	\$56	\$0	\$504

- The fall 2023 advertising influenced about \$104 million in visitor spending and returned \$504 in visitor spending for each \$1 invested in the advertising media.
- The core markets produced the highest return by a wide margin.

Fall 2023 Tax ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	104,421	2,219	0	106,641
Avg. Taxable Trip Spending (among ad-aware visitors)	\$692	\$1,152	\$1,699	\$701
Ad-Influenced Taxable Trip Spending	\$72,208,381	\$2,556,682	\$0	\$74,765,063
Taxes Generated	\$6,137,712	\$217,318	\$0	\$6,355,030
Media Investment	\$100,000	\$73,000	\$33,000	\$206,000
Tax ROI	\$61.38	\$2.98	\$0.00	\$30.85

- In terms of tax revenue, the fall 2023 advertising returned about \$31 for each \$1 invested in the advertising media.

Fall ROI Tracking

	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	% Change 2022 to 2023
Target HHs	19,205,673	9,612,930	25,578,115	21,562,811	17,429,051	-19%
Ad Awareness	32%	48%	34%	37%	43%	17%
Ad-Aware HHs	6,150,380	4,641,103	8,656,969	8,049,391	7,564,316	-6%
Incremental Travel	3.30%	1.50%	0.80%	1.30%	1.41%	8%
Incremental Trips	204,124	71,415	69,476	105,635	106,641	1%
Avg. Trip Spending (among ad-aware visitors)	\$904	\$936	\$977	\$1,181	\$973	-18%
Ad-Influenced Trip Spending	\$184,568,565	\$66,818,515	\$67,887,580	\$124,806,730	\$103,739,534	-17%
Media Investment	\$278,113	\$233,288	\$159,485	\$226,338	\$206,000	-9%
ROI	\$664	\$286	\$426	\$551	\$504	-9%
Avg. Taxable Trip Spending (among ad-aware visitors)	\$578	\$594	\$675	\$827	\$701	-15%
Ad-Influenced Taxable Trip Spending	\$118,075,492	\$42,418,245	\$46,911,234	\$87,401,514	\$74,765,063	-14%
Taxes Generated	\$10,626,794	\$3,817,642	\$3,987,455	\$7,429,129	\$6,355,030	-14%
Tax ROI	\$38	\$16	\$25	\$33	\$31	-7%

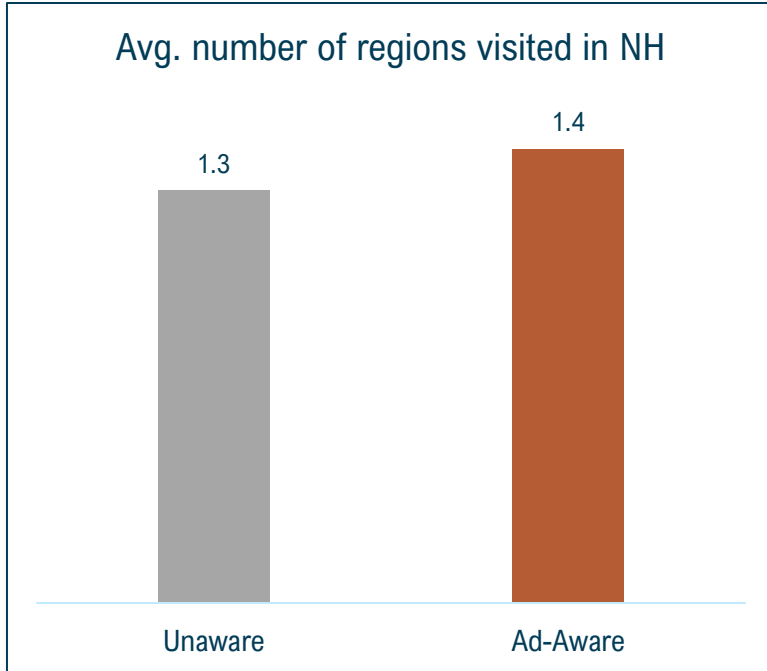
- The more focused marketing strategy in fall 2023 resulted in higher levels of ad awareness and incremental travel, but the smaller and closer-by household base meant lower average visitor spending, less ad-influenced visitor spending, and a lower ROI compared to last year. That said, the fall 2023 ROI is higher than it was in 2020 and 2021.

Fall 2023 ad Influence on the New Hampshire Trip



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Ad Influence on the New Hampshire Trip

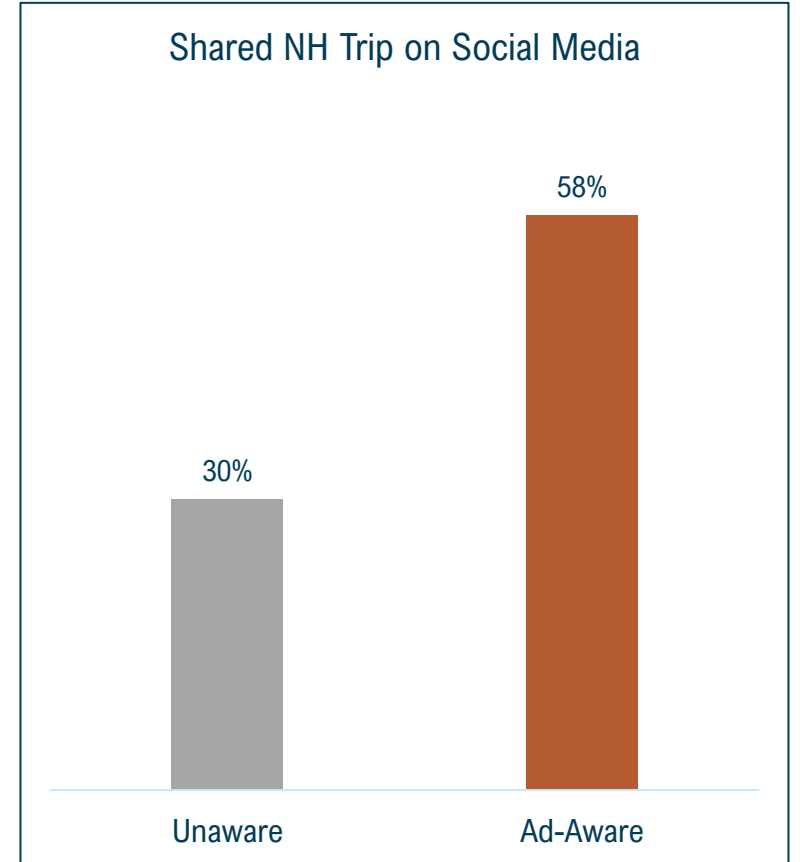
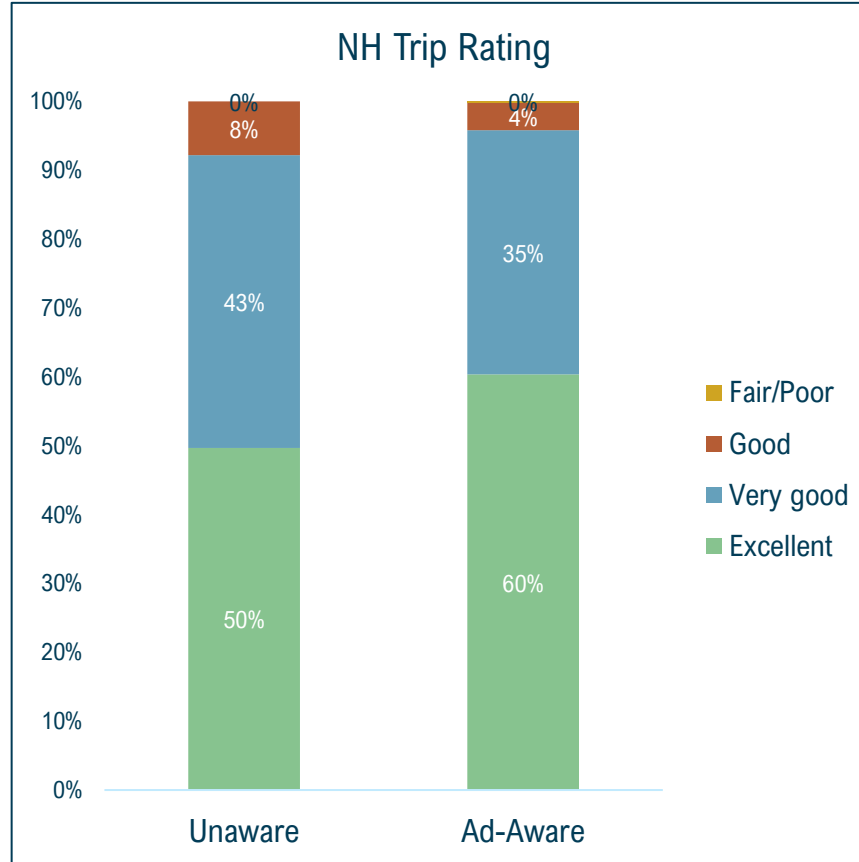


New Hampshire Region Visited	Unaware	Ad-Aware	Difference
Lake Region	26%	34%	7%
Great North Woods	10%	17%	7%
Dartmouth/Lake Sunapee	5%	11%	6%
White Mountains	47%	53%	6%
Monadnock Region	1%	5%	3%
Seacoast	20%	13%	-6%
Merrimack Valley	22%	12%	-10%

- Those aware of the fall 2023 advertising visited slightly more New Hampshire regions on average than those not aware of the ads. Perhaps more interesting is that the ads drove travel to the more remote (northern/western) parts of the state.

Ad Influence on the New Hampshire Trip

- Ad-aware visitors are also more likely than unaware visitors to rate their New Hampshire trip “excellent” and to share their trip on social media. In other words, the advertising is working to produce New Hampshire advocates.



Appendix: Questionnaire



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Questionnaire

**New Hampshire Tourism
Fall Ad Awareness and ROI
November 2023**

SCREENER MODULE

ZIP. What is your ZIP code? _____

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

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

S1. Please indicate which of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, X (formally known as Twitter), 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 am currently planning or have already planned an upcoming leisure trip		
I listen to Pandora Radio		

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
- X (formerly known as Twitter)
- Facebook
- Travel review sites such as TripAdvisor
- TikTok
- Other, please specify _____
- None of these

PERCEPTIONS MODULE

1. Thinking about places to go for domestic leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

- STATE #1 _____
 STATE #2 _____
 STATE #3 _____
 STATE #4 _____
 STATE #5 _____

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you prefer to visit for a leisure trip within the next year?

Please select only one. [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

TRAVEL MODULE

5. Have you visited any of the following states since August 2023 for a leisure trip? How many trips did you take in each state since August 2023?

[ROTATE]	States visited since August 2023 (Select all that apply)	Number of visits since August 2023
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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

Now, please give us some information about the trip(s) you took to New Hampshire since August 2023.

9. When since August 2023 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- August 2023
- September 2023
- October 2023
- November 2023
- December 2023

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

10_1. How many nights did you spend in New Hampshire during this trip? _____

10_2. Including you, how many people were in your travel party? _____

ASK Q10b if Q10_2 > 1

10b. Of those, how many were children under age 18? _____

ASK Q10c if Q10_1 > 0

10bb. What mode(s) of transportation did you use to travel to New Hampshire? Select all that apply.

- Airplane
- Personal car/truck/van
- Rental car/truck/van
- RV
- Other

Questionnaire

10c. What forms of lodging did you use during your trip? Select all that apply.

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

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply. [ROTATE]

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

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

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

INSERT NEW HAMPSHIRE REGIONS MAP

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

4

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

- Excellent
- Very good
- Good
- Fair
- Poor

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

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

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

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

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

T13 AND T14 ARE TO ADDRESS AGRITOURISM.

T13. Did you visit or participate in any of the following on your trip?

ROTATE, ANCHOR "NONE"	
Retreat and rendezvous centers	
Nature centers	
Farm tours	
Farm-based lodging	
Cross-country ski or snowshoe trails	
Country overnight bed and breakfast	
Bird or big-game hunting preserves	
Bird and wildlife watching	
Corn mazes or haunted forests	
Petting farms	

5

Hands-on U-pick	
Winery/vineyard	
Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides	
Farmers markets	
Rural wedding	
None of these	

T14x. Please estimate how much your travel party spent in total on the following activities/attractions...

SHOW ALL OF THOSE THAT THEY DID FROM T13. INCLUDE ONLY ONE NUMERIC BOX – WE JUST WANT TOTAL SPENDING ON ALL THINGS COMBINED	
---	--

14. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

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

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. TikTok
9. None of these

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

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

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

1. Yes
0. No

6

Questionnaire

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

AD AWARENESS MODULE



30 Fall Spot

Vimeo: 882977951

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

- Yes
- No

FALLvideoB. What is your reaction to this ad?

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

FALLvideoC. Why do you feel that way? _____

USA ONLY:

3 VIDEOS:

Fall Landscapes Slideshow	Foliage Tracker	Visitor's Guide
Fall Landscapes Slideshow.mp4	Foliage Tracker.mp4	Visitor's Guide.mp4
Vimeo: 882963166	Vimeo: 882970054	Vimeo: 882963196

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

- Yes
- No

FALLvideoB. What is your reaction to this ad?

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

FALLvideoC. Why do you feel that way? _____

DIGITAL

ASK OF EVERYONE:



Native ad Nov 2023

Native ad Nov 2023.mp4

Vimeo: 882954641

MONTREAL AND QUEBEC CITY

FRENCH ONLY

VisitFall23_Retargeting_French_300x600	VisitFall23_Canada French_300x600

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

VisitFall23_Core_300x600	VisitFall23_Retargeting_300x600

LONG-DRIVE: PA, NJ ONLY

I:\Ads Master\New Hampshire\2023\Fall 2023\Fall 2023 Ad Effectiveness Study\Display\Long-Drive (Eastern PA, NJ)

VisitFall23_Long Drive_300x600	VisitFall23_Retargeting_300x600

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? _____

Questionnaire

SOCIAL
MONTREAL AND QUEBEC CITY
FRENCH ONLY



5 Expériences d'Automne



Balades Automnales FB



Traquet de Feuillage

ENGLISH ONLY



5 Fall Experiences



Fall Road Trips FB



Foliage Tracker 2

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



Foliage Tracker 2



Leave No Trace



The Ultimate Fall Road Trip Instagram



Ultimate Fall Road Trip

LONG-DRIVE: PA, NJ ONLY



7 Scenic Foliage Drives



Foliage Tracker 2



Long Drive Carousel



Ultimate Fall Road Trip 2

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

- Yes
- No

FallSocialB. What is your reaction to these ads?

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

FallSocialC. Why do you feel that way? _____

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

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

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

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

DEMO MODULE

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

- D3. Are you currently ...?
 Married/living as married
 Divorced/Separated
 Widowed
 Single/Never married
- D4. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]
- D5. How many children under the age of 18 live in your household? _____
- D6. Which of the following categories represents the last grade of school you completed?
 High school or less
 Some college/technical school
 College graduate
 Post-graduate degree
- D7. Which of the following categories best represents your total annual household income before taxes?
 Less than \$35,000
 \$35,000 but less than \$50,000
 \$50,000 but less than \$75,000
 \$75,000 but less than \$100,000
 \$100,000 but less than \$150,000
 \$150,000 but less than \$200,000
 \$200,000 or more
- D2. Which of the following best describes your ethnic heritage? Are you...? (ALLOW MULTI)
- Caucasian/White
 - African American/Black
 - Asian
 - American Indian
 - Native Hawaiian or Other Pacific Islander
 - Other (Specify _____)
- D2a. Do you identify as Hispanic or Latino?
 Yes
 No
- D1. Are you ...?
 Male
 Female
 Other
 Prefer not to answer