



2019 Spring & Summer Advertising Effectiveness

November 2019



Background

- The New Hampshire Division of Travel and Tourism Development (the Division) continues to place seasonal media campaigns targeting leisure travelers.
- In order to be accountable for the resources invested in these efforts, the Division has retained Strategic Marketing & Research Insights (SMARInsights) to measure awareness and impact of this advertising for the past five fiscal years. An entire year's worth of media was evaluated in a single measure for the first two research efforts but starting in 2017-18 two waves of research were conducted based on seasonal placements.
- This current research is an evaluation of the 2019 spring and summer campaigns. With a previous measure of the fall and winter 2018-19 media, there is a complete picture of the entire fiscal year's marketing.
- The specific objectives of this seasonal awareness research include:
 - Measure awareness of the spring and summer 2019 advertising among the target audience;
 - Evaluate the efficiency of the Division's media buy through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
 - Understand the overlap and potential impact of multiple media;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
 - Assess the ability of the advertising to influence New Hampshire travel;
 - Calculate the number of ad-influenced trips, visitor spending, and return on investment of the media campaigns; and
 - Forward insights into future refinement of the marketing.

Methodology

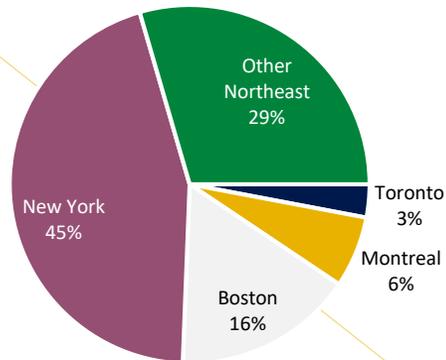
- An online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents had to be 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.
- In order to evaluate individual target markets, quotas were established in Toronto, Montreal, Boston, and New York City. The Division's paid media placements can also reach a broader audience throughout the Northeast. So in addition to the spot markets evaluated, interviews were completed in "Other Northeastern States" including Connecticut, Maine, Massachusetts, Rhode Island, Vermont, New Jersey, and New York.
- Toronto was not included as a target market in spring/summer 2018 but was included this year as well as in 2016 and 2017.
- A total of 2,320 surveys were completed across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the research results. The questionnaire and the ads tested appear in the Appendix.

	Completed Surveys
Toronto	403
Montreal	411
Boston	407
New York City	601
Other Northeastern States	498
Total	2,320

Campaign Overview

- The Division continues to air the Limitless campaign under the Live Free brand with some new executions for 2019 spring/summer. Also, Toronto was added as a target market in spring/summer 2019.
- The Division spent about \$1.8 million on the 2019 spring/summer advertising tested in this research.
- Spring/summer media spending was basically unchanged (1% increase) compared to the prior year.
- New York and the Other Northeast markets account for 74% of the 2019 spring/summer investment.

Distribution of 2019 Spring/Summer Ad Spending



	2015-16	2016-17	2017-18	2018-19	% Change
Fall/Winter	\$597,447	\$718,592	\$687,891	\$749,963	9%
Spring/Summer	\$3,144,803	\$1,563,742	\$1,794,097	\$1,817,216	1%
Total	\$3,742,250	\$2,282,334	\$2,481,988	\$2,649,179	3%



Spring/Summer 2019					
	TV	Out of Home	Digital (banners, social, video)	Total	% of Total
Toronto	\$0	*\$0	\$54,235	\$54,235	3%
Montreal	\$22,950	\$19,798	\$74,210	\$116,958	6%
Boston	\$12,143	\$224,325	\$57,774	\$294,241	16%
New York	\$383,860	\$362,800	\$69,320	\$815,980	45%
Other Northeast	\$172,110	\$15,550	\$348,141	\$535,801	29%
Total	\$591,063	\$622,473	\$603,680	\$1,817,216	100%

*The media plan lists \$82K spent on OOH advertising in Toronto, but this was not tested in the research.

Insights: Spring/Summer Ad Influence & ROI

- The Limitless campaign continues to influence New Hampshire travel and visitor spending.
- The Division's 2019 spring/summer advertising influenced about \$330 million in visitor spending and a return of \$182 for each \$1 invested.
- Media spending was flat compared to the prior spring/summer campaign, and the ad impact results are also similar.

	Spring/ Summer 2018	Spring/ Summer 2019	Change
Influenced visitor spending	\$321,101,120	\$330,339,600	3%
Media spending	\$1,794,097	\$1,817,216	1%
ROI	\$179	\$182	2%

Insights:

Fiscal Year Ad Influence & ROI

- The combined fall/winter & spring/summer results account for an entire fiscal year of advertising influence.
- Compared to the prior fiscal year, the fiscal year 2018/2019 advertising generated more visitor spending and a higher ROI.

	Fall/Winter 2017/18	Fall/Winter 2018/19	Change
Influenced visitor spending	\$185,578,461	\$241,941,141	30%
Media spending	\$687,891	\$749,963	9%
ROI	\$270	\$323	20%
	Spring/Summer 2018	Spring/Summer 2019	Change
Influenced visitor spending	\$321,101,120	\$330,339,600	3%
Media spending	\$1,794,097	\$1,817,216	1%
ROI	\$179	\$182	2%
	Total FY 2017/2018	Total FY 2018/2019	Change
Influenced visitor spending	\$506,679,581	\$572,280,741	13%
Media spending	\$2,481,988	\$2,567,179	3%
ROI	\$204	\$223	9%

Insights: Strategic Considerations

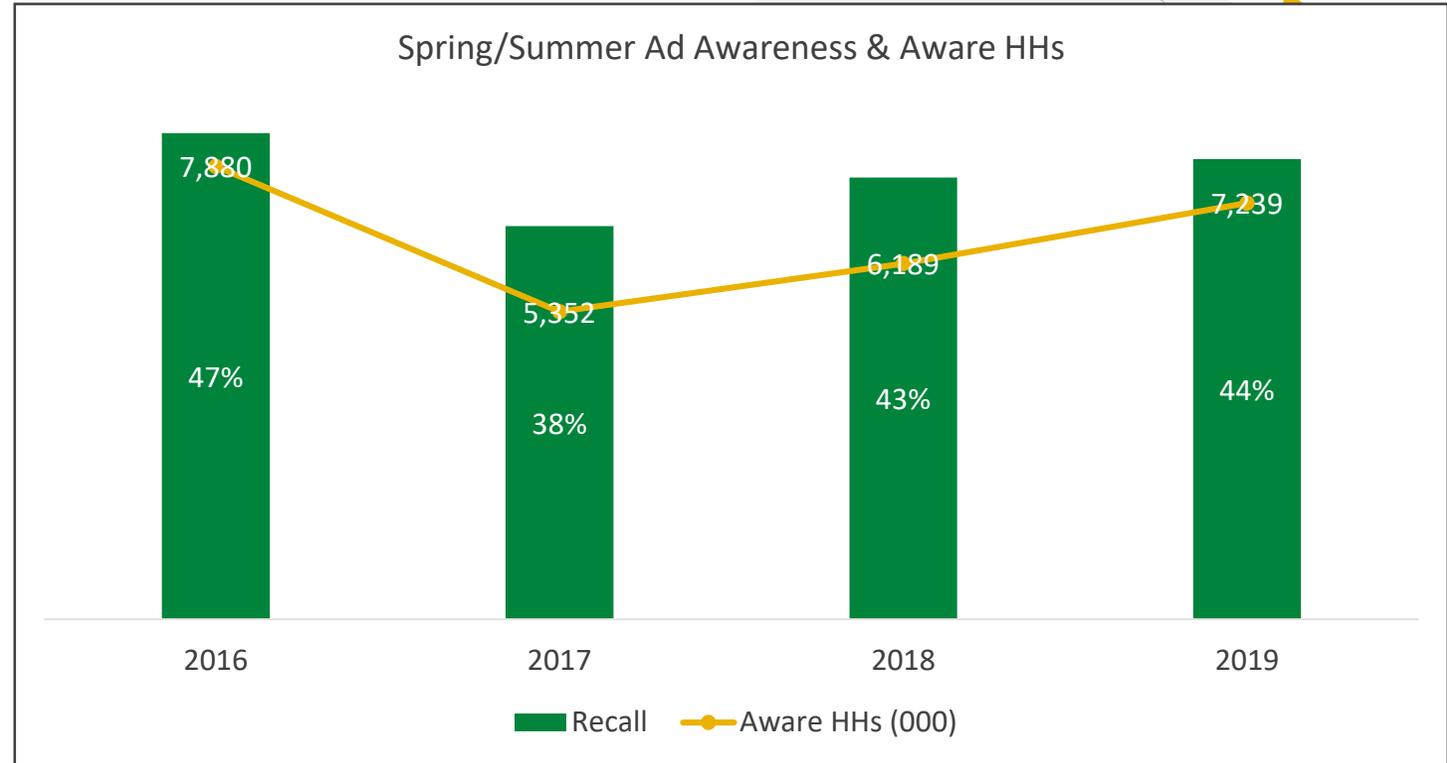
- The Division continues to implement efficient media plans. The 2019 spring/summer advertising generated 44% awareness, reaching about 7.2 million target households. With a media investment of \$1.8 million, the Division spent \$0.25 to reach a target household. This marks a gain in efficiency over the \$0.29 spring/summer 2018 figure, and a relatively efficient media buy compared to the industry benchmark of \$0.51.
- The spring/summer 2019 strategy resulted in ad media overlap. Of those aware of any ads, about three-quarters recall seeing ads in multiple media. About a third recall seeing ads in four or five media. This is critical, as the level of advertising influence spikes notably at awareness of four media. The Division should certainly continue to implement multi-media ad campaigns and prioritize generating overlap.
- The Limitless campaign is in its fourth fiscal year. While creative ratings generally remained in the same industry benchmark level, there was some slippage in the ad communication ratings that could be an early sign of creative wear-out and suggestive of the need for refreshed creative to prevent further declines. Classifying New Hampshire trip activities based on rates of participation and motivation is a way to prioritize candidates for inclusion in paid media marketing. The activities that have relatively high rates of participation and motivation include hiking, parks, scenery, tours, and shopping.
- The advertising is influencing New Hampshire travel from all target markets, but some markets stand out. The Other Northeastern States are the top performing market, as they account for just 25% of households but 38% of ad-influenced trips (a performance ratio of 1.52). Boston also over-performs from this perspective and maintains its status as a key target market. New York City is also an important market that produced 34% of the total ad-influenced trips. Montreal and Toronto combine for just 13% of ad-influenced trips. These markets should be monitored for future performance rather than considered for omission.
- The advertising is targeted to younger consumers, and the effectiveness of this effort is apparent in relatively high levels of ad awareness and relatively strong creative ratings among Millennials and Gen Xers. Moreover, these two generations account for about three-quarters of ad-influenced trips (36% Millennials, 40% Gen Xers).



Advertising Awareness

Overall Awareness

- Overall, 44% of the target consumers recall seeing the 2019 spring/summer advertising.
- The level of awareness is only one percentage point higher than 2018 spring/summer, but the addition of Toronto led to notably more ad-aware target households (7.2 million vs. 6.2 million).
- With a similar investment, the cost per aware household figure improved from \$0.29 in 2018 to \$0.25 in 2019.
- The New Hampshire media buy continues to be relatively efficient compared to SMARInsights' industry norm of \$0.51 per aware household.



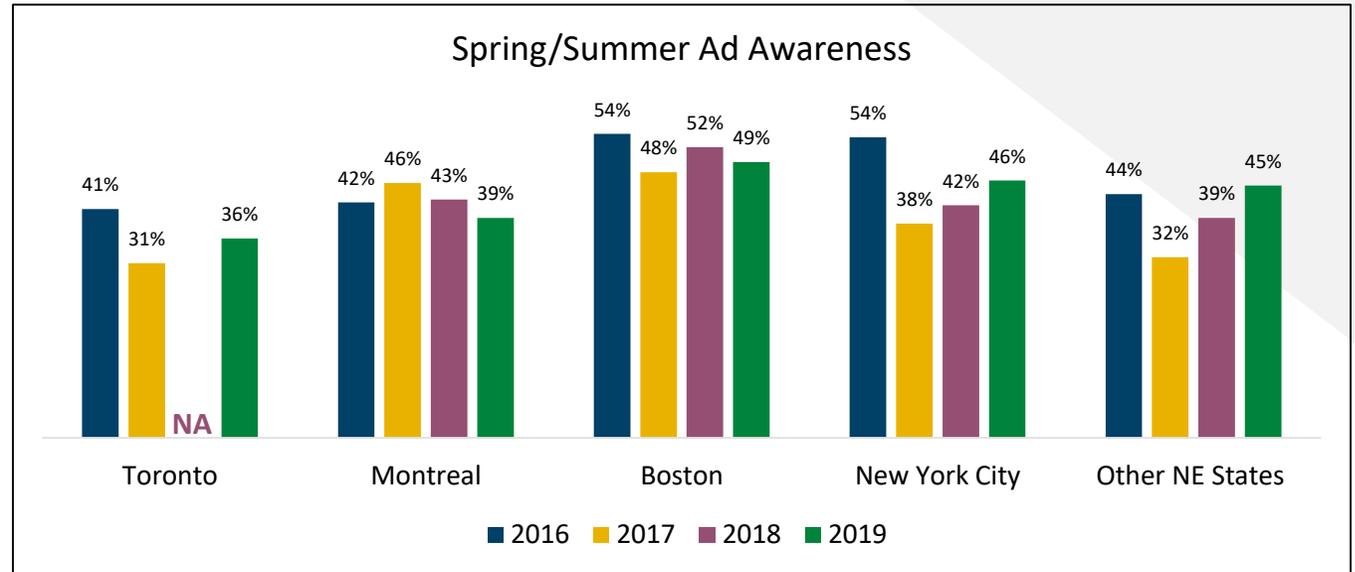
SMARInsights' spot market benchmark: \$0.51 per aware household

Spring/Summer	2016	2017	2018	2019
Target HHs	16,766,266	14,085,084	14,496,273	16,275,450
Recall	47%	38%	43%	44%
Aware HHs	7,880,145	5,352,332	6,189,099	7,239,490
Media Spending	\$3,144,803	\$1,563,742	\$1,794,097	\$1,817,216
Cost per Aware HH	\$0.40	\$0.29	\$0.29	\$0.25

Awareness by Market

- Compared to the prior year, the level of overall ad awareness grew in New York City and the Other Northeastern States but fell in Montreal and Boston.
- The ads reached 36% of consumers in the Toronto market, up from 31% in 2017 (Toronto was not a spring/summer target in 2018).
- Toronto and Montreal were the most efficient markets in terms of cost per aware household, but all markets beat the industry benchmark of \$0.51.

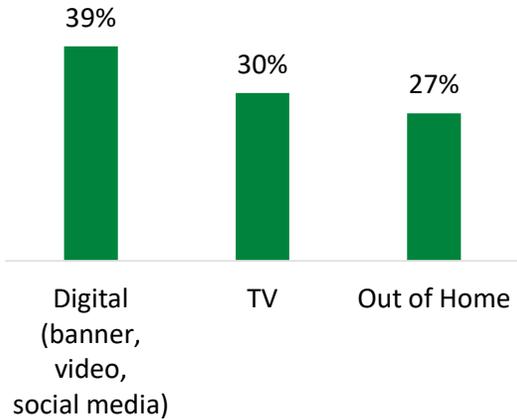
SMARInsights' spot market benchmark: \$0.51 per aware household



Spring/Summer 2019	Toronto	Montreal	Boston	New York City	Other Northeastern States
Target HHs	1,779,177	1,659,368	2,142,302	6,578,364	4,116,239
Awareness	36%	39%	49%	46%	45%
Aware HHs	635,736	654,057	1,057,992	3,031,958	1,859,747
Media Spending	\$54,235	\$116,958	\$294,241	\$815,980	\$535,801
Cost per Aware HH	\$0.09	\$0.18	\$0.28	\$0.27	\$0.29

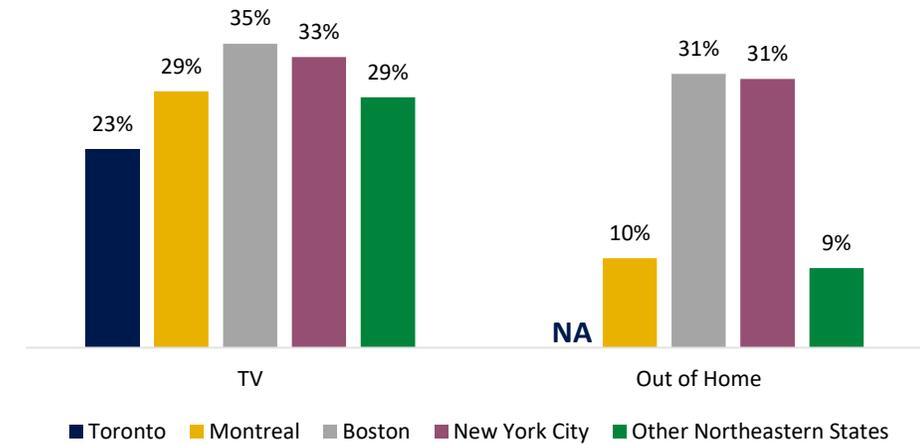
Awareness by Medium

Ad Awareness by Medium (All Markets)



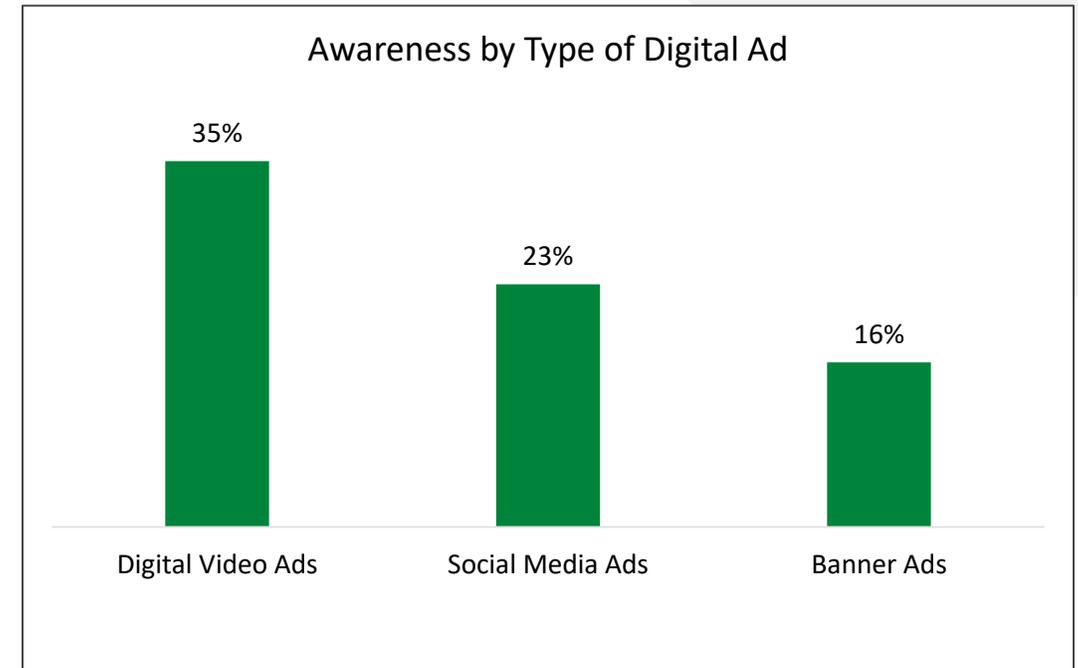
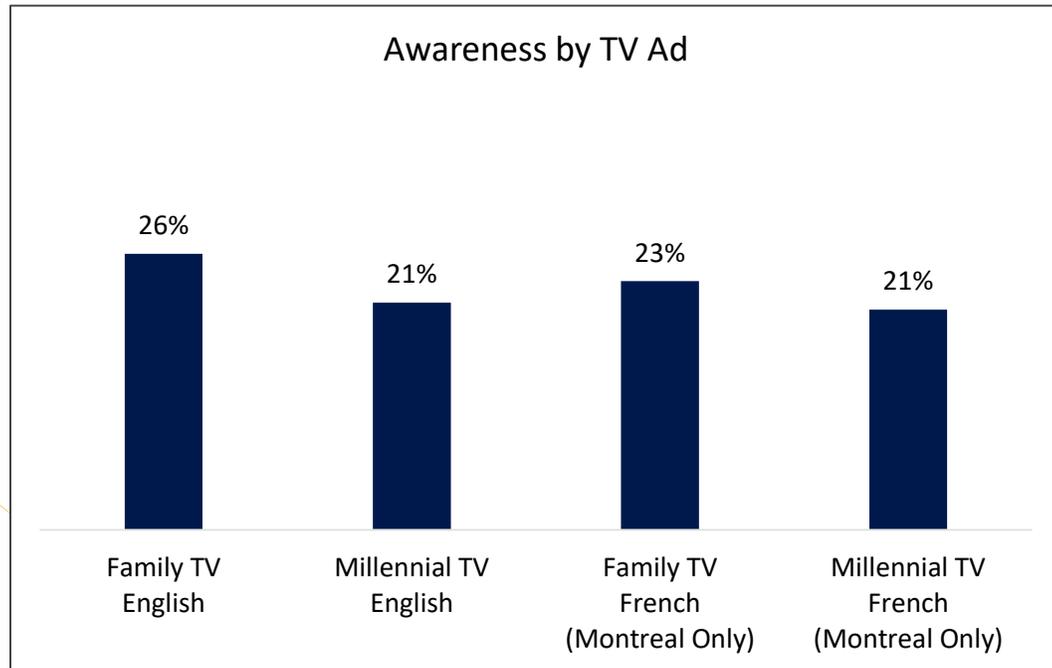
All Markets			
	Digital	TV	Out of Home
Target HHs	16,275,450	16,275,450	16,275,450
Awareness	39%	30%	27%
Aware HHs	6,281,959	4,916,172	4,322,500
Media Spending	\$603,680	\$591,063	\$622,473
Cost per Aware HH	\$0.10	\$0.12	\$0.14

TV & Out of Home Awareness by Market



- The digital advertising – which includes banners, videos, and social media ads – generated the highest level of awareness of any medium (39%). TV is next highest at 30%, followed by out of home at 27%.
- All three media were similarly efficient in terms of cost per aware household, which is an unexpected but positive finding as TV is generally more costly than other media.
- Boston and New York City received the bulk of the out-of-home advertising investment, and it shows in relatively high awareness of this medium in these markets. New York City and the Other Northeastern states received the most TV ad dollars, and while TV ad awareness is relatively high in New York, awareness is generally more similar across target markets. This is indicative of a mature campaign with videos that have run on multiple media in multiple markets for several years.

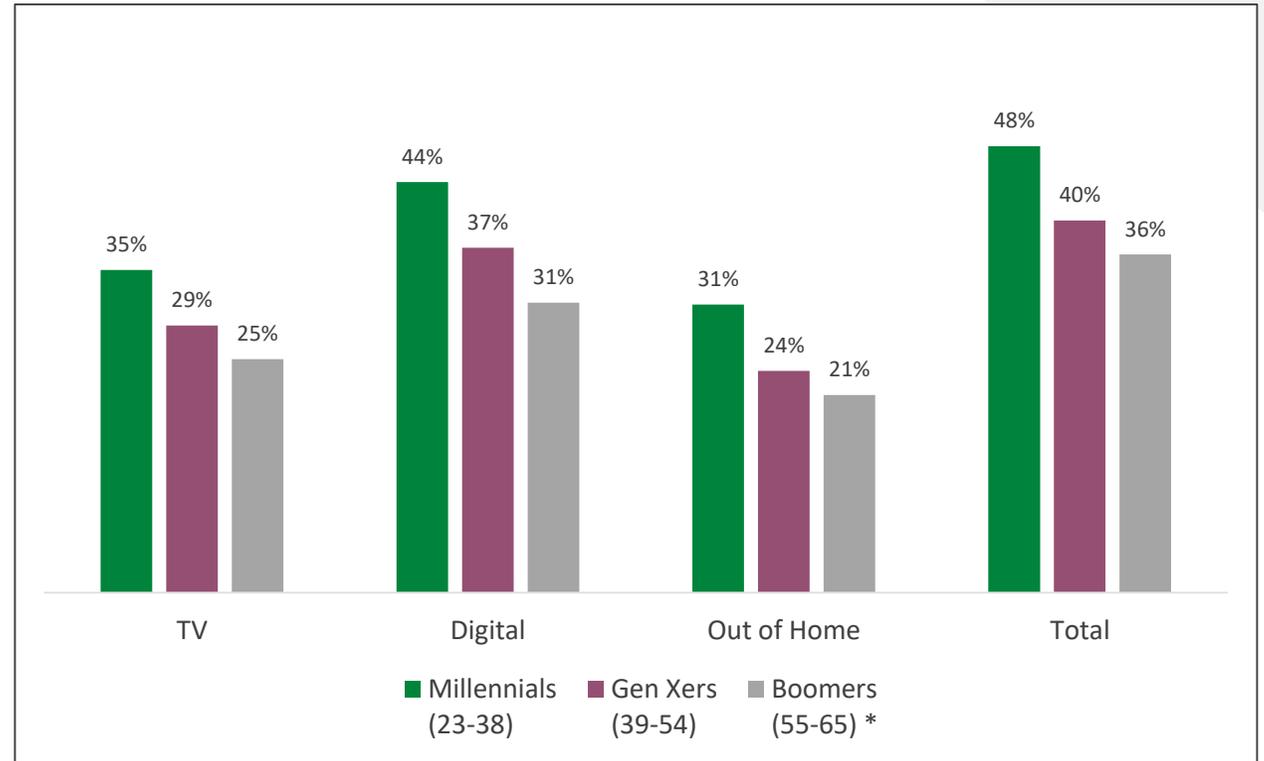
Awareness by TV Ad & Type of Digital Ad



- The family TV ads generated slightly higher awareness than the Millennial TV ads.
- Of the digital assets, the videos generated the highest level of awareness.

Awareness by Generation

- The campaign and the media buy is targeted to Millennials and Gen Xers, so it is a positive finding that awareness is sizably stronger among these younger audiences.
- Still, the ads are also reaching the Boomer audience.

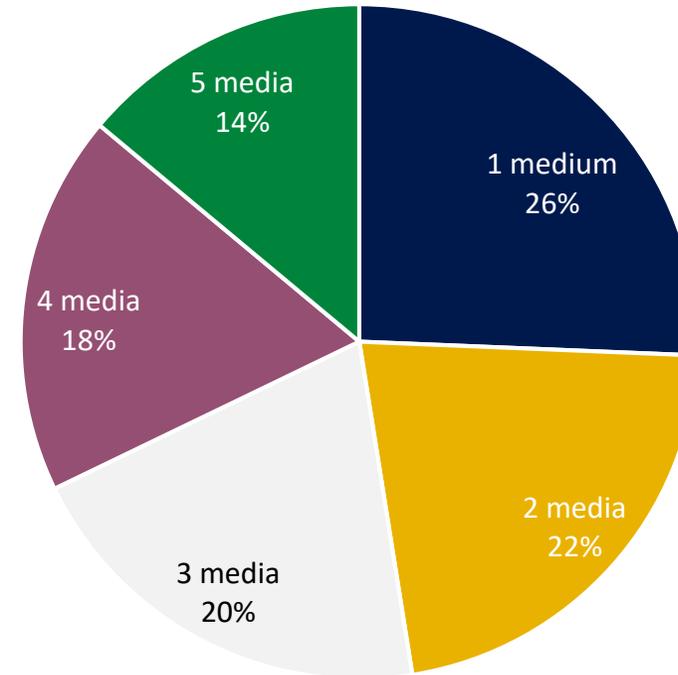


* Boomers' age range traditionally goes to 73, but we screened out those older than 65.

Media Overlap

- Exposing consumers to advertising across media generally increases ad impact. Each medium plays a role that can influence consumers at various stages of the travel journey. For instance, TV and digital video help to build the overall brand, while digital banners and social media ads can help to close the sale. The impact of media overlap is reviewed later in this report; first we consider the level of overlap attained.
- Of those aware of any ads, nearly three-quarters are aware of ads in multiple media. Almost a third recall seeing ads in for or five media.

Number of *Media Seen
(of those aware of any ads)

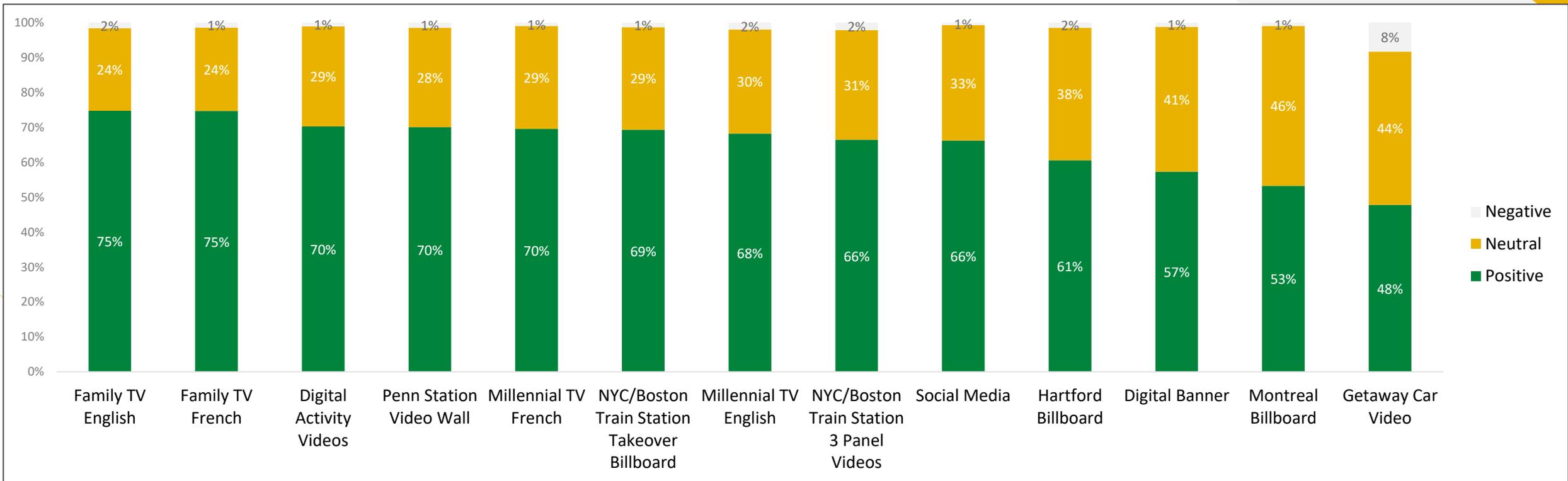


*Includes TV, digital video, digital banners, social media, and outdoor ads.



Creative Review

Creative Reaction



- First, consider the overall reaction to each of the 2019 creative elements tested sorted by the percentage of positive reactions.
- The majority of reactions to most of the ads are positive, with the exception of the Getaway Car video, which receives just under half positive reactions.
- In general, the TV ads/videos are the strongest ads from this standpoint except for Getaway Car, which is the weakest.

Why Negative Reaction to Getaway Car Video

- While the Getaway Car video received only 8% negative reactions, this is more than any other ad. Plus it received more negative/neutral reactions than positive reactions. The result was similar in the fall/winter research, when consumers indicated that the Getaway Car video showed activities that are too dangerous, noisy, or frenetic, or were too focused on driving rather than the outdoors. Some similar themes are present in the reasons for disliking the spring/summer version, along with the actors being unlikable and the ads generally missing the mark in terms of promoting New Hampshire's leisure travel product:

"Just didn't do anything for me. Some scenery was interesting, but people laughing and chatting in a vehicle doesn't really grab my attention and it all made no sense."

"It doesn't show what it has to offer there."

"I do not like the people in the ad. They are very annoying and take away from the scenery and message of the ad."

"Seems like a reality TV show."

"Wouldn't entice to visit, they are just trying to sell cars."

"I couldn't connect to the people in the ad."

"It's boring and it doesn't look like it promotes New Hampshire's scenery."

"Is this an ad for a car, a reality show, YouTube channel, vacation? Kinda confused. I might look up 'the getaway car' but doesn't seem worth it for a Jeep or a weird TV channel."

"It's very boring and looks like a home movie that doesn't show the beauty."

"It doesn't really tell me anything. It confuses me."

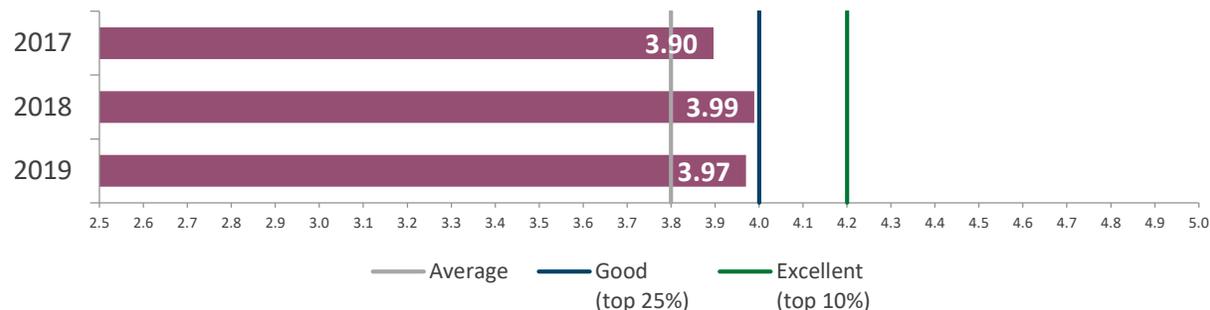
"The ad was too distracting there was a lot of things going on at first I was trying to concentrate on the scenery in the background of the video but I was distracted by the goofing off between the male and the female in the vehicle and the choice of music was also distracting and I didn't really catch the beauty of the outside grounds and beautiful scenery."

"It seems too hyper."

"Too noisy, looks like they are going to NH to make a mess."

Communication Attributes (5-point scale)

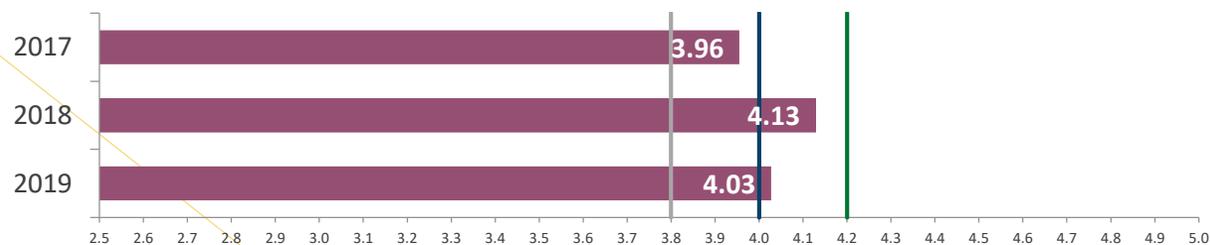
Where I would be inspired and invigorated



Where I could reconnect with my family



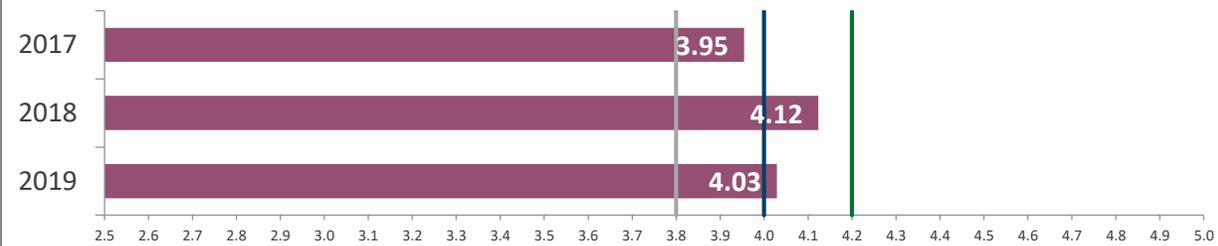
Where I would feel free-spirited



Where I would be challenged to live life to the fullest



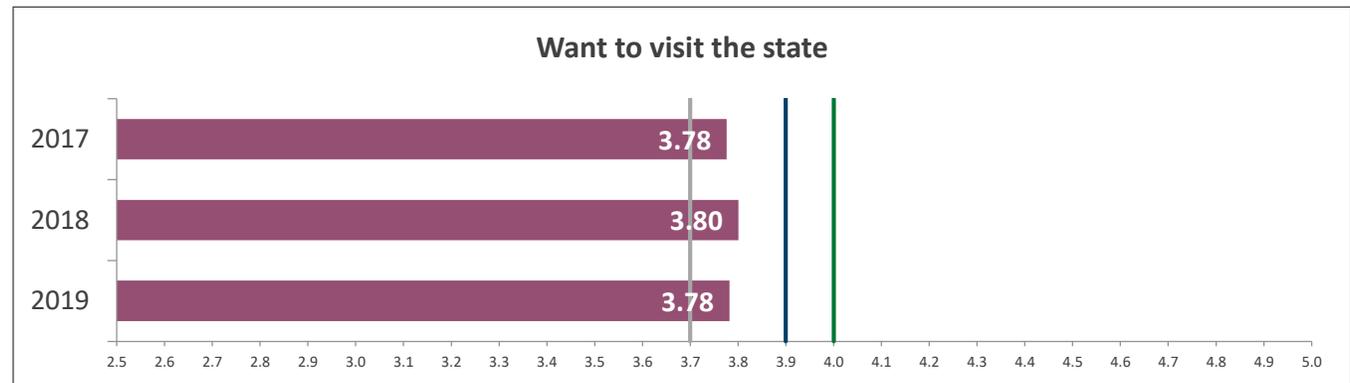
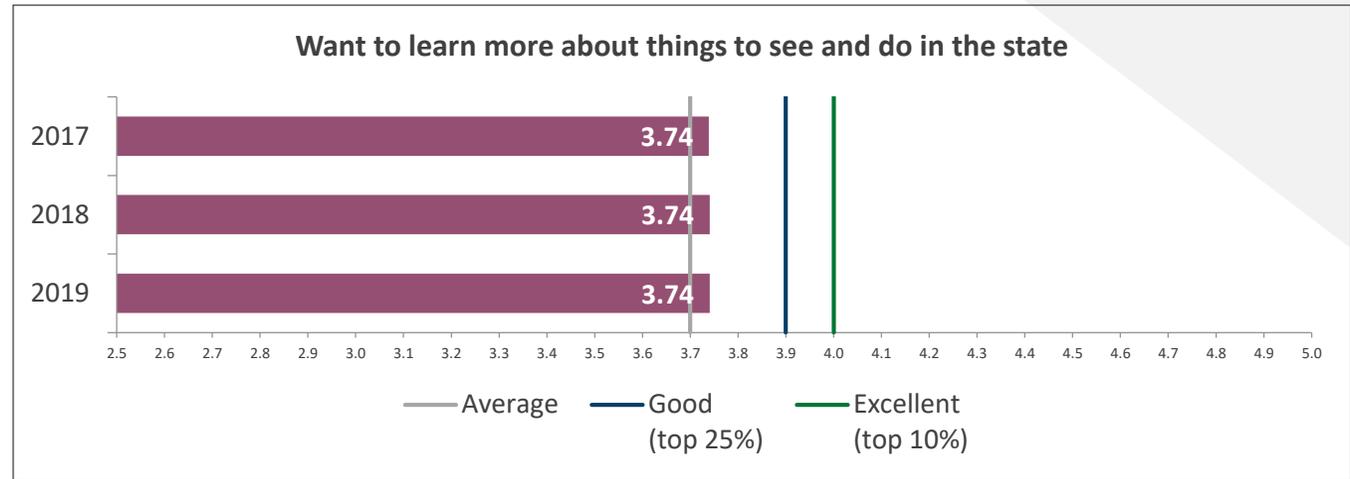
Where I could uncover new places or things



- The advertising communication ratings are down slightly compared to 2018 but are generally in the same benchmark level.
- The slight declines are typical for an aging campaign that has had only minor updates over the past few years.

Impact Attributes (5-point scale)

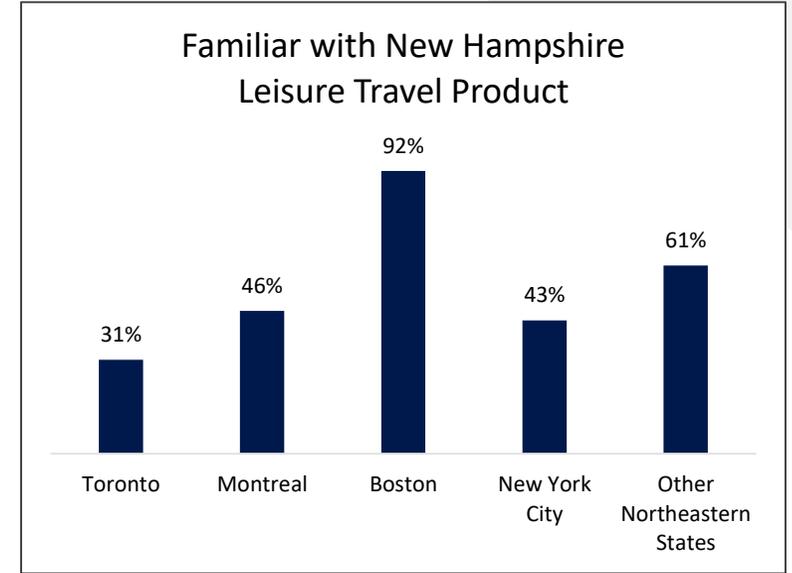
- The impact ratings are essentially unchanged and remain above average compared to the industry benchmarks.



Ad Ratings by Market

Above average across markets
Average across markets
Below average across markets

Ad Rating Statement	Toronto	Montreal	Boston	New York City	Other Northeastern States
Where I would be inspired and invigorated	3.79	3.96	4.03	3.97	4.06
Where I could reconnect with my family	3.64	3.90	3.85	3.77	3.74
Where I would feel free-spirited	3.88	4.01	4.14	3.99	4.12
Where I would be challenged to live life to the fullest	3.70	3.89	3.88	3.83	3.93
Where I could uncover new places or things	3.96	4.07	4.07	3.97	4.13
Want to learn more about things to see and do in the state	3.60	3.77	3.73	3.70	3.88
Want to visit the state	3.59	3.81	3.95	3.71	3.91

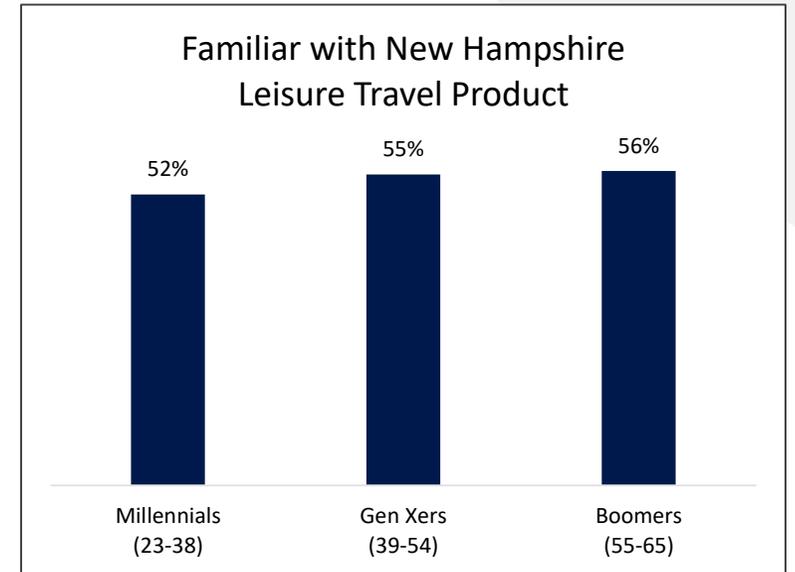


- Consumers from Boston and the Other Northeastern States give the ads relatively high ratings. These two markets are also the most familiar with the state, so they can relate to the advertising messages. A positive correlation between familiarity and reaction to advertising is a common result.

Ad Ratings by Generation

Above average across markets
Average across markets
Below average across markets

Ad Rating Statement	Millennials (23-38)	Gen Xers (39-54)	Boomers (55-65)
Where I would be inspired and invigorated	4.05	3.96	3.89
Where I could reconnect with my family	3.78	3.79	3.72
Where I would feel free-spirited	4.10	4.02	3.94
Where I would be challenged to live life to the fullest	3.90	3.87	3.77
Where I could uncover new places or things	4.13	4.01	3.95
Want to learn more about things to see and do in the state	3.84	3.76	3.60
Want to visit the state	3.89	3.79	3.63



- The advertising is targeted to younger consumers, and the effectiveness of this effort is evidenced in the higher ad ratings among Millennials.
- Unlike the cross-market results, Millennials’ relatively positive reaction to the advertising is not related to greater familiarity; rather, it is driven by creative content.

The background features several diagonal lines and shapes. A prominent dark blue diagonal line runs from the top right towards the center. A yellow diagonal shape is on the left side. A thin grey diagonal line runs from the top left towards the center. A thin blue diagonal line runs from the bottom left towards the center. A thin yellow diagonal line runs from the bottom right towards the center.

Advertising Impact

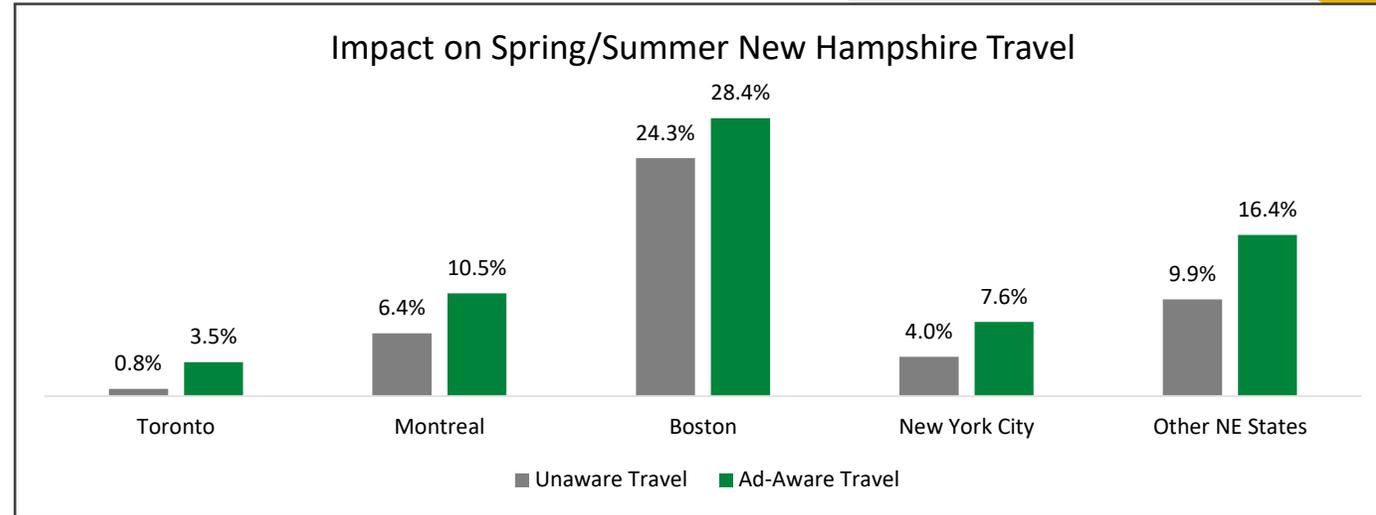
Incremental Travel

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



Impact of the Advertising on Travel

- Overall, the 2019 spring/summer advertising generated about 317,000 New Hampshire trips between March and October 2019.
- The advertising influenced New Hampshire travel from all target markets, with the largest impact occurring in the Other Northeastern States. This strong impact in these states highlights the strong potential of a regional targeting strategy.
- The Other Northeastern States and New York City account for about three-quarters of total ad-influenced trips. About three-quarters of advertising dollars went to these two markets, suggesting a smart investment allocation.
- The following slide reviews market performance by comparing the percentage of ad-influenced trips by market to the market population distribution.

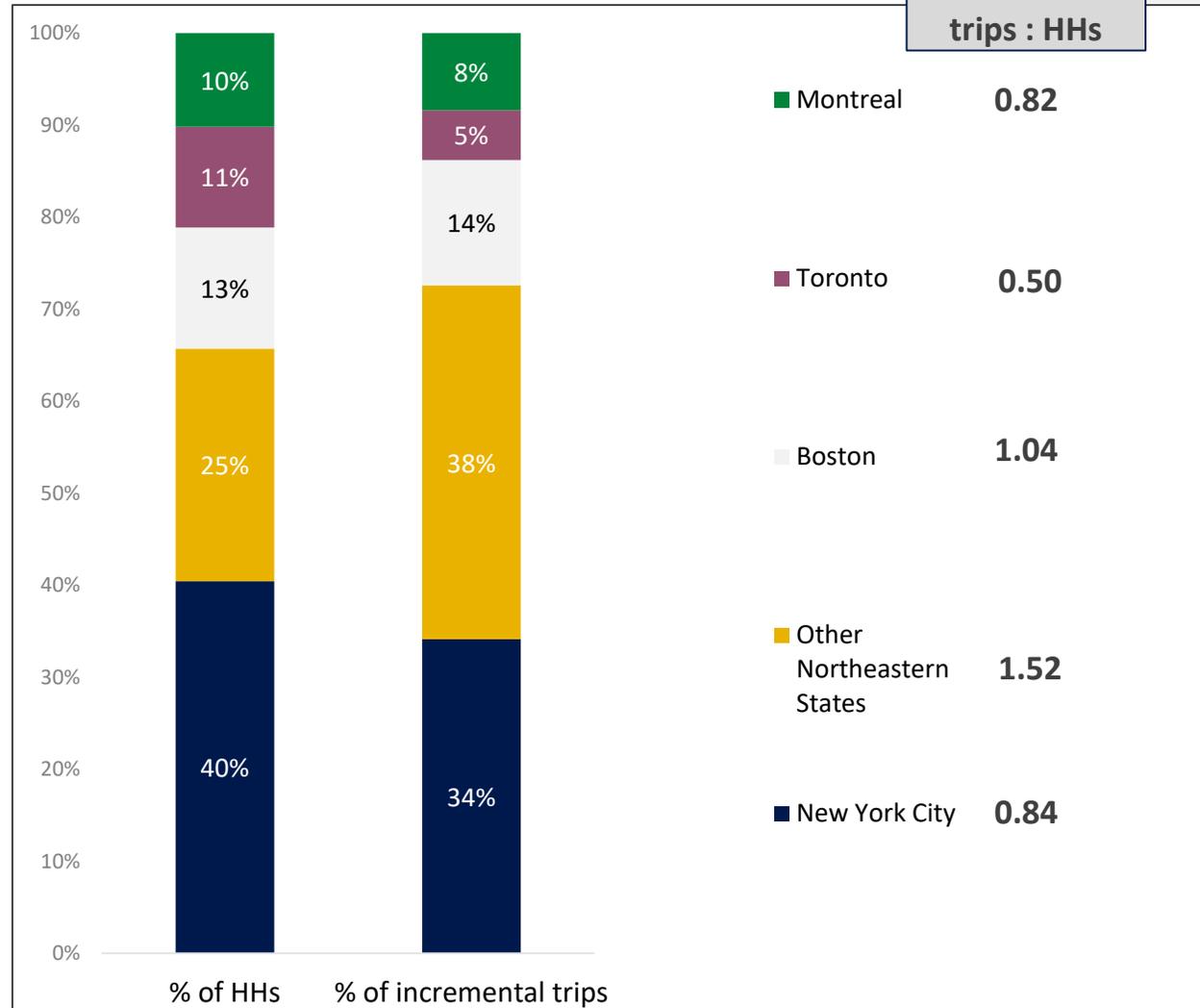


	Toronto	Montreal	Boston	New York City	Other NE States	Total
Qualified HHs	1,779,177	1,659,368	2,142,302	6,578,364	4,116,239	16,275,450
Ad Aware	36%	39%	49%	46%	45%	44%
Aware HHs	635,736	654,057	1,057,992	3,031,958	1,859,747	7,239,490
Increment	2.7%	4.1%	4.1%	3.6%	6.6%	4.4%
Incremental Trips	17,165	26,608	43,233	108,207	121,894	317,107

Market Performance

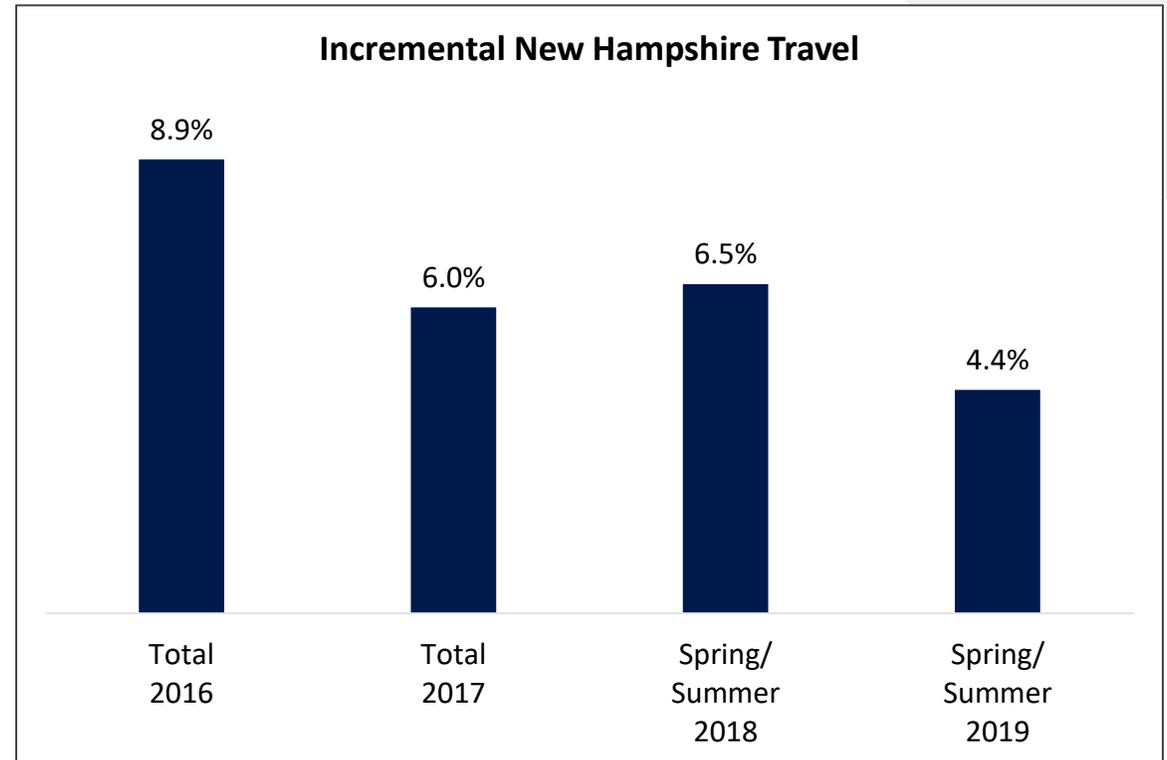
- The ratio of incremental trip percentage : household population percentage highlights which markets over- or under-performed.
- The Other Northeastern States stand out as the top performing market, as they account for just 25% of households but 38% of ad-influenced trips (a performance ratio of 1.52).
- Boston slightly over-performs and maintains its status as a key target market.
- New York City underperforms from this perspective, but it is still an important market that produced 34% of the total ad-influenced trips. New York City's distance from New Hampshire and the relatively high cost of placing media here drives the "underperformance" in terms of the ratio.
- Montreal and Toronto have performance ratios under 1.0, but they are still contributing ad-influenced trips. These markets should be monitored for future performance rather than considered for omission.

Ratio of
incremental
trips : HHs



Advertising Impact Change

- The creative communication ratings dipped this year after gains the previous year. As noted, this is typical of a wear-in/wear-out cycle for leisure travel advertising.
- As even more concrete evidence of creative wear-out, the level of incremental (ad-influenced) travel shows a downward trend.



Return on Investment

- The 2019 spring/summer advertising returned \$182 in visitor spending for each \$1 invested.
- This marks a slight gain over the \$179 ROI generated by the 2018 spring/summer advertising.
- There were fewer ad-influenced trips in 2019, but higher average ad-aware visitor spending led to an increase in ad-influenced visitor spending. The strong economy and consumer confidence are driving higher average leisure trip spending. The advertising is also driving higher average visitor spending, as overall average visitor spending among 2019 spring/summer visitors is \$882.

	2018 Spring/Summer	2019 Spring/Summer
Influenced Spring/Summer Trips	399,487	317,107
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042
Influenced Trip Spending	\$321,101,120	\$330,339,600
Media Spending	\$1,794,097	\$1,817,216
ROI	\$179	\$182

Tax Return on Investment

- Of the ad-influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so only those related to lodging, meals, and transportation are taxed.
- Based on the average visitor spending on the taxable categories of lodging, meals, and transportation, approximately the 2019 spring/summer advertising generated \$19.4 million in taxes.
- Given media spending, the ads returned \$10.68 in tax revenue each \$1 invested. This tax return is slightly lower than the industry average (\$12) for taxes returned. However, it is notable that New Hampshire is basically on par with competitors in terms of tax ROI given the state's tax structure is much more conservative than its competitors.

	2018 Spring/Summer	2019 Spring/Summer
Influenced Trips	399,487	317,107
Avg. Taxable Spending (among ad-aware visitors)	\$598	\$680
Influenced Taxable Spending	\$238,957,240	\$215,567,826
Taxes Generated	\$21,506,152	\$19,401,104
Media Spending	\$1,794,097	\$1,817,216
Tax ROI	\$11.99	\$10.68

Total Fiscal Year 2018/2019 ROI

- The combination of 2018/2019 fall/winter and 2019 spring/summer provides a measure of total fiscal year ad impact.
- In total, the FY2018/2019 advertising influenced about 636,000 New Hampshire trips and about \$572 million in visitor spending. With a total media buy of \$2.57 million, the ROI is \$223 for each \$1 invested. In terms of tax dollars the FY2018/2019 ROI is \$13.00.

	Fall/Winter 2018/2019	Spring/Summer 2019	Total Fiscal Year 2018/2019
Influenced Trips	319,063	317,107	636,170
Avg. Trip Spending (among ad-aware visitors)	\$758	\$1,042	\$900
Influenced Trip Spending	\$241,941,141	\$330,339,600	\$572,280,741
Avg. Taxable Trip Spending (among ad-aware visitors)	\$486	\$680	\$583
Influenced Taxable Trip Spending	\$155,116,722	\$215,567,826	\$370,684,548
Taxes Generated (9% tax rate)	\$13,960,505	\$19,401,104	\$33,361,609
Media Spending	\$749,963	\$1,817,216	\$2,567,179
ROI	\$323	\$182	\$223
Tax ROI	\$18.61	\$10.68	\$13.00

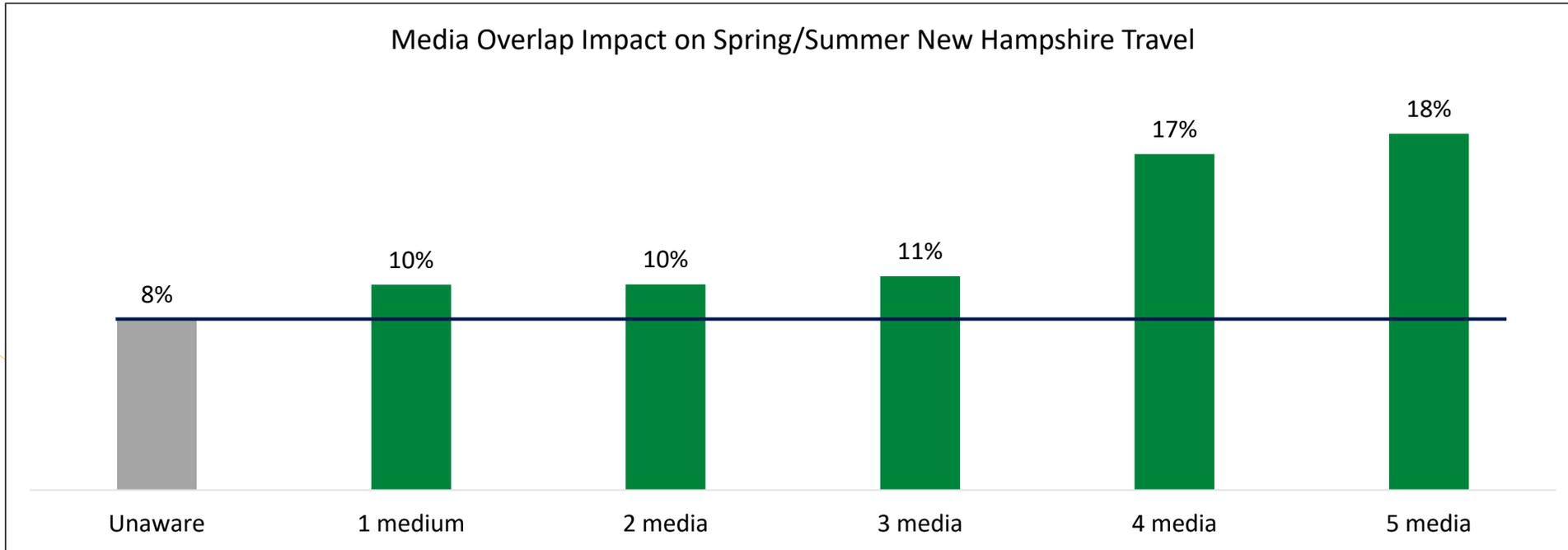
Total Fiscal Year ROI Comparison

- Total fiscal year visitor spending ROI and tax ROI both increased compared to the prior year.

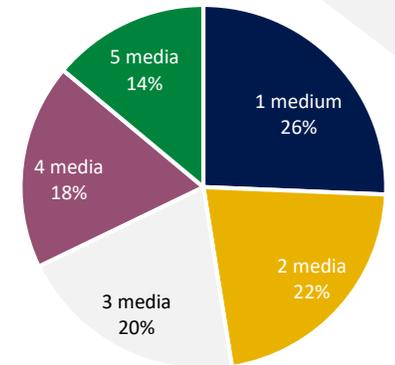
	Total Fiscal Year 2017/2018	Total Fiscal Year 2018/2019
Influenced Trips	604,055	636,170
Avg. Trip Spending (among ad-aware visitors)	\$839	\$900
Influenced Trip Spending	\$506,679,581	\$572,280,741
Avg. Taxable Trip Spending (among ad-aware visitors)	\$586	\$583
Influenced Taxable Trip Spending	\$353,937,438	\$370,684,548
Taxes Generated (9% tax rate)	\$31,854,370	\$33,361,609
Media Spending	\$2,481,988	\$2,567,179
ROI	\$204	\$223
Tax ROI	\$12.83	\$13.00

Media Overlap Impact

Media Overlap Impact on Spring/Summer New Hampshire Travel



Number of *Media Seen
(of those aware of any ads)



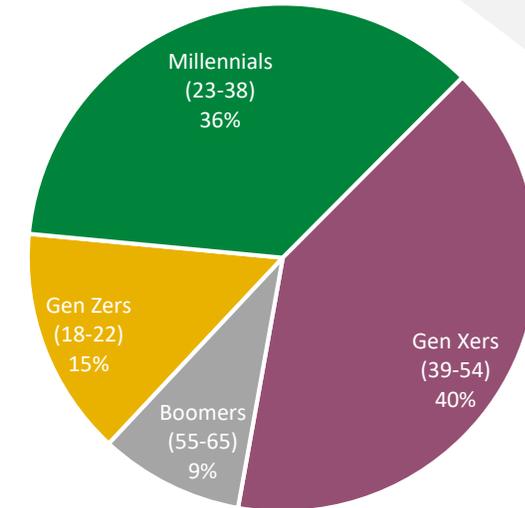
*Includes TV, digital video, digital banners, social media, and outdoor ads.

- Earlier the level of advertising media overlap was reviewed (shown again in the pie chart on the right).
- The column chart above shows that the level of New Hampshire travel increases significantly when consumers are exposed to ads in four or more media. This highlights the importance of implementing multi-media campaigns with the goal of generating awareness overlap.

Ad Impact by Generation

	Gen Zers (18-22)	Millennials (23-38)	Gen Xers (39-54)	Boomers (55-65)
Target HHs	1,705,645	5,725,449	5,197,005	3,647,350
Awareness	64%	48%	40%	36%
Aware HHs	1,099,124	2,742,407	2,074,332	1,323,627
Incremental Travel	4.2%	4.2%	6.2%	2.2%
Incremental Traveling HHs	46,170	113,950	128,027	28,961

Distribution of Ad-Influenced Trips by Generation



- The advertising influenced New Hampshire travel among all generations, but population, level of awareness, and level of ad impact result in Millennials and Gen Xers accounting for about three-quarters of influenced trips.



Trip Specifics

Spring/Summer Trip Specifics

- New Hampshire visitors from the advertising target markets spend 3.0 nights on average in the state.
- Travel parties include 3.2 people on average, and about a third of parties include children.
- Total average visitor spending is \$882, which equates to \$94 per person per day.
- Mid-level hotels, family/friends' homes, budget hotels, B&B and Airbnb are the top lodging options. The percentage of visitors indicating that they stayed in an Airbnb jumped notably from 4% last spring/summer to 12% this year.

Trip Specifics	2018 Spring/Summer Trips	2019 Spring/Summer Trips
Nights in New Hampshire	3.1	3.0
People in your travel party	3.2	3.2
Kids on trip	30%	31%
Overall average spending	\$712	\$882
Per person/per day spending	\$72	\$94
Lodging		
Mid-level hotel	32%	29%
Home of family or friends	22%	21%
Budget hotel or motel	12%	12%
Bed and breakfast/Inn	7%	12%
Airbnb	4%	12%
Camping/RVing	12%	9%
High-end full-service hotel	8%	8%
Luxury resort hotel	8%	7%
Vacation home	7%	5%

Trip Activity Classification

Paid Media Marketing (Large Audience, Strong Motivation)	Niche Marketing (Small Audience, Strong Motivation)	In-Destination Marketing (Large Audience, Weak Motivation)	Less Marketing Potential (Small Audience, Weak Motivation)
Hiking or backpacking	Horseback riding	Visiting historical sites	Bicycling or mountain biking
Visiting a state or national park	Camping	Wildlife watching	ATVing
Scenic drive	Attending a play or concert	Dining at locally owned restaurants	Rock climbing
Sightseeing tour	Attending a festival or fair	Farmer's markets/U-picks/roadside stand	Hunting
Shopping	Attending performing arts (music/theater)		River rafting
	Golfing		Fishing
	Beer trail		Visiting museums
	Canoeing or kayaking		Bird watching
			Visiting a noteworthy bar or nightclub
			Farm to table dinner
			Winery tours
			Boating

- A way to classify and prioritize New Hampshire trip activities is to consider rates of participation and motivation. The activities that have relatively high rates of both are the top candidates for inclusion in paid media marketing. These are shown in the green table above and include hiking, parks, scenery, tours, and shopping.
- The activities that are more suited to niche marketing are those with low rates of participation, but strong motivation. These are shown in the pink table.
- Activities with high rates of participation but that are not particularly motivating are more suited to in-destination marketing, giving visitors ideas of extra things to do (yellow table).
- Some activities have less marketing potential given low rates of participation and motivation, as shown in the gray table. This is not to say that these activities should not be used in advertising, but they probably shouldn't be the focus of the ad. For example, an ad showcasing mountain biking in beautiful and dramatic scenery would work – but an ad focusing solely on mountain biking would be less effective.



Appendix

Questionnaire

Questionnaire

**New Hampshire Tourism
Ad Awareness and ROI
October 2019**

ZIP. What is your postal/ZIP code? _____

These are the screeners to identify leisure travel decision makers.

S1. Please indicate if each of the following apply to you.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0, TERMINATE AFTER SCREENING QUESTIONS)		
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 Hulu or Netflix		
I like to travel during the fall to view the changing leaves		
I'm interested in taking winter vacations that involve skiing or snowboarding		

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

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

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

Questions 1-5 will be used to evaluate the impact of the advertising on top-of-mind recall, familiarity and travel.

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 most 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	

5. Have you visited any of the following states since March 2019 for a leisure trip? How many trips did you take in each state since March 2019?

[ROTATE]	States visited since March 2019 (Select all that apply)	Number of visits since March 2019
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

Questions 6-8 will be used to evaluate the impact of the advertising on information gathering and image of New Hampshire.

6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?

1. Requested a New Hampshire Visitor's Guide
2. Visited the New Hampshire Tourism site, www.visitnh.gov
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on Twitter
5. Followed Visit New Hampshire on Instagram
6. Requested information about a New Hampshire trip in another way
7. Received e-newsletter
8. None of these

IF Q6=2, ASK Q7



VisitNH.gov Homepage.jpg

7. Is this the New Hampshire website you visited?

1. Yes
0. No

Questionnaire

IF 6=3, ASK Q7A



Visit NH Facebook Page Screenshot.jpg

7a. Is this the New Hampshire Facebook page you accessed?

- 1. Yes
- 0. No

IF 6=7, ASK Q7B



NewEngland.com.jpg

7b. Is this similar to the New Hampshire e-newsletter you received?

- 1. Yes
- 0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					

4

Is a great place for winter sports such as skiing and snowmobiling									
Is a place I would be excited to visit for a leisure trip									
Is a good place for shopping									
Is a great place to vacation when traveling with children									
Offers great vacations for people like me									
Is affordable									
Is a good place for fairs and festivals									
Is a good place to go to the beach									
Is a good place for water activities									

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

Questions 9-23 will be used to understand New Hampshire trips, including party composition, trip activities and spending.

Now, please give us some information about the trip(s) you took to New Hampshire since March 2019.

9. When since March 2019 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- 3..... March 2019
- 4..... April 2019
- 5..... May 2019
- 6..... June 2019
- 7..... July 2019
- 8..... August 2019
- 9..... September 2019
- 10..... October 2019

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

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	

5

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	
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	Canoing or kayaking	
Attending performing arts (music/theater)	Boating	
Visiting historical sites		
	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?

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

- 5. Excellent
- 4. Very good
- 3. Good
- 2. Fair
- 1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? _____

6

Questionnaire

16. 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 – best estimate is fine. If no expenditures in a category enter a "0"

- Lodging/Accommodations _____
- Meals/Food/Groceries _____
- Entertainment/Attractions _____
- Shopping _____
- Entertainment such as shows, theater or concerts _____
- Transportation to New Hampshire _____
- Transportation within New Hampshire _____
- Other _____
- Total SHOW TOTAL _____

17. 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

18. 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. None of these

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

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

7

This next section will be used to measure recall of New Hampshire advertising.

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

1. Yes → ASK 20a
0. No

20a. What do you recall about the ads? _____

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

Digital Banner



Summer Digital. Have you seen this or similar online ad before now?

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

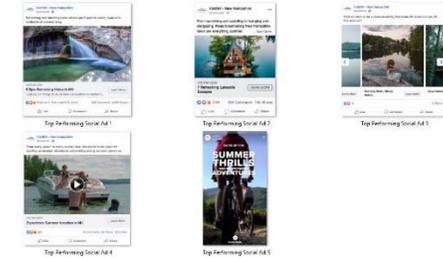
SummerDigitalB. What is your reaction to this ad?

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

SummerDigitalC. Why do you feel that way? _____

8

Social Ads



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

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

SummerSocialB. What is your reaction to these ads?

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

SummerSocialC. Why do you feel that way? _____

TV

US and TORONTO MARKETS ONLY:



MONTREAL ONLY:



9

Questionnaire

ASK TV SERIES FOR EACH SPOT

SummerTV. How many times have you seen this or a similar ad for New Hampshire?

3. More than three times
2. Two or three times
1. Once
0. Never

SummerTVB. What is your reaction to this ad?

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

SummerTVC. Why do you feel that way? _____

Digital Activity Videos



BIKING 15-HD.mp4

- 363810207



HIKING 15 mp4

- 363810531



KAYAK 15-HD.mp4

- 363811605

ASK FOR EACH VIDEO

SummerActivity. How many times have you seen this or a similar ad for New Hampshire?

3. More than three times
2. Two or three times
1. Once
0. Never

ASK AFTER ALL VIDEOS SHOWN

SummerActivityB. What is your reaction to these ads?

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

10

SummerActivityC. Why do you feel that way? _____



Getaway Car 15.mp4

- 363811954

SummerActivity1. How many times have you seen this or a similar ad for New Hampshire?

3. More than three times
2. Two or three times
1. Once
0. Never

SummerActivityB1. What is your reaction to this ad?

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

SummerActivityC1. Why do you feel that way? _____

11

OOH

SHOW ALL ADS FOR EACH MARKET ON THE SAME SCREEN

Billboard

HARTFORD (CONNECTICUT)



Hartford Billboard.jpg

BOSTON



Boston I-93 Billboard.jpg

MONTREAL



Montreal Billboard.jpg

12

Questionnaire

Station Takeover NYC



nyconestart_2046_Page_1



nyconestart_2046_Page_2



nyconestart_2046_Page_3



nyconestart_2046_Page_4



nyconestart_2046_Surfing

Station Takeover Boston



SunshineCampaign_All_Page_1



SunshineCampaign_All_Page_2



SunshineCampaign_All_Page_3



SunshineCampaign_All_Page_4

Train Stations - 3 PANEL WALL BOSTON & NYC



biking total.jpg
BIKING CENTER MONITOR.mp4
- 366326376



hiking total.jpg
HIKING CENTER MONITOR.mp4
- 366487266



kayak total.jpg
KAYAKING CENTER MONITOR.mp4
- 366487586

SHOW VIDEOS FOR EACH AD

SHOW ALL ON ONE PAGE; ASK FOR EACH AD

SummerOutdoor1. Have you seen this New Hampshire video ad in a train station?

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

ASK AFTER ALL ADS

SummerOutdoorB1. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK SummerOutdoorC1

SummerOutdoorC1. Why do you feel that way? _____

BOSTON



Boston Kenmore Sq. Elevator Wrap



Boston Kenmore Sq. Tower



Boston Transit Posters

Boston Kenmore Sq. Elevator Wrap.jpg

Boston Kenmore Sq. Tower.jpg

Boston Transit Posters.jpg

SHOW ALL ON ONE PAGE; ASK FOR EACH AD

SummerOutdoor. Please indicate if you have seen each of these ads before.

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

ASK AFTER ALL ADS

SummerOutdoorB. What is your reaction to these ads?

4. Positive
5. Neutral
6. Negative – ASK SummerOutdoorC

SummerOutdoorC. Why do you feel that way? _____

PENN STATION VIDEO AD

NYC MARKET

SHOW IMAGE AND VIDEO ON THE SAME SCREEN



Penn Station Video Wall - Static Ex.jpg

DRED TV FAMILY 30 FOR PENN STATION.mpg

- 363817110

SummerOutdoorVideo. Have you seen this or a similar New Hampshire video ad in Penn Station?

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

SummerOutdoorVideoB. What is your reaction to this ad?

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

SummerOutdoorVideoC. Why do you feel that way? _____

Questions 21-22 will be used to evaluate the messaging of the advertising campaign.

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

	Strongly disagree				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

22. 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

Questionnaire

The following questions detail demographics.

DEMOS [DO NOT FORCE]

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

marital. Are you currently ...?

- Married
- Divorced/Separated
- Widowed
- Single/Never married

ppinHH. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]

kids. How many children under the age of 18 live in your household? _____

education. 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

income. 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

ethnicity. What is your race/ethnicity? *Select all that apply.*

- African-American/black
- Asian/Pacific Islander
- Caucasian/white
- Latino/Hispanic
- Mixed ethnicity
- American Indian
- Other, please specify _____)

Gender. Are you ...?

- Male
- Female