New Hampshire

LIVE FREE

2026 Spring/Summer Advertising Effectiveness Wave 1 Research

August 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.
- The specific objectives of this research include:
  - Gauging advertising awareness at peak levels (near the end of the media flight);
  - Measuring the efficiency of the media investment;
  - Gathering consumer reaction to the creative;
  - Assessing advertising impact by comparing the perceptions and behaviors of those aware of the ads to the same measures among those not aware of the ads;
  - Comparing research results across market groups; and
  - Providing insights to guide marketing decision-making.

Methodology

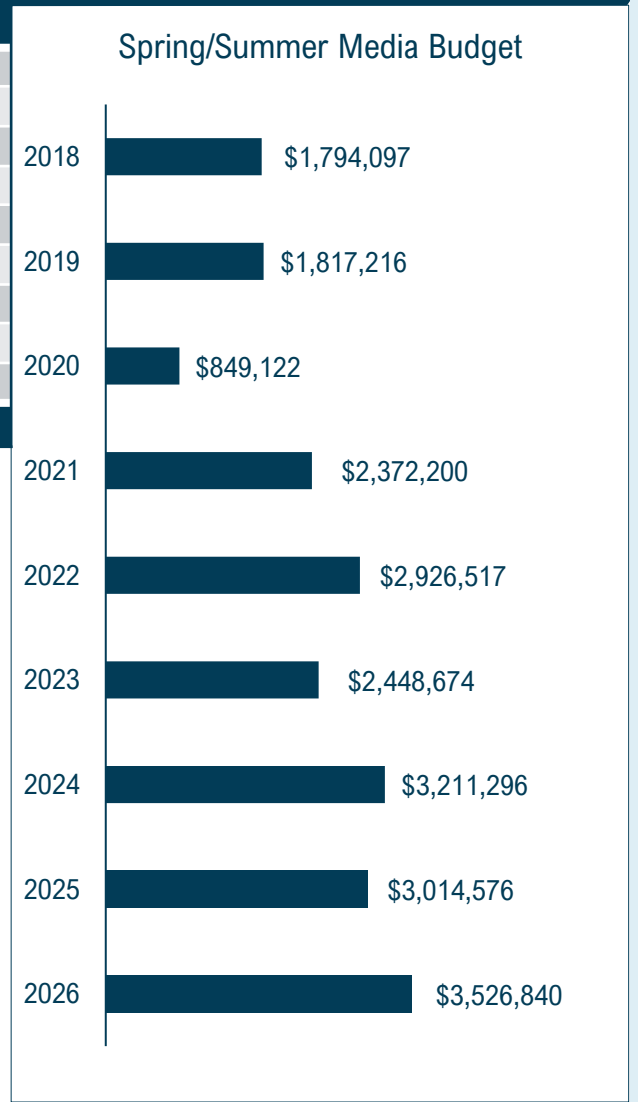
- As with previous New Hampshire ad effectiveness research, an online survey was used so that respondents could view the actual advertising. This method provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors 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 2,307 surveys were completed between late June and early July 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	77
	Providence/New Bedford	105
Opportunity	Philadelphia	200
	Connecticut	101
	Duchess, Orange, Ulster, Westchester, Rockland and Sullivan Counties NY	100
Florida	Orlando	136
	Tampa	132
	Ft. Myers	32
Canada	Montreal	300
Behavioral	DC, GA, IL, KY, MA (minus Boston), MI, NC, NJ, NY (minus select counties), OH, PA (minus Philadelphia), VA, VT	823
Total		2,307

Campaign Overview

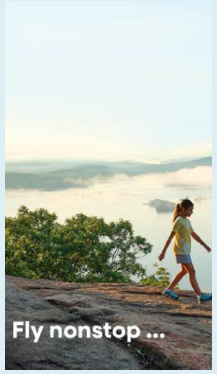
GEOGRAPHY	PRINT	TV	OOH	CTV	OLV	DISPLAY	SOCIAL	TOTAL
CORE	$55,923	$108,000	$153,206	$213,750	$86,250	$75,000	$132,000	$824,129
OPPORTUNITY	$0	$0	$206,506	$325,000	$134,000	$172,250	$184,000	$1,021,756
CANADA	$0	$0	$0	$40,000	$20,000	$71,400	$20,000	$151,400
FLORIDA	$0	$0	$120,220	$269,000	$151,250	$156,250	$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

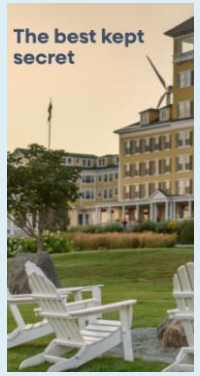
- The 2026 spring/summer advertising tested in this research included print, TV, out of home, CTV/OLV, digital display, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The total campaign investment increased by more than $500,000 (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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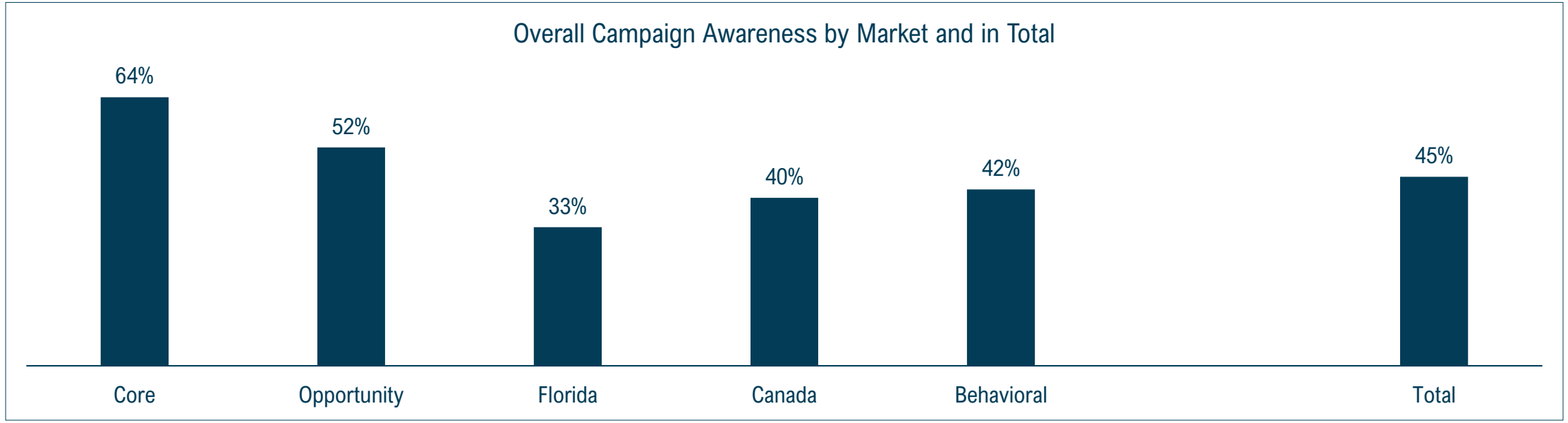
Insights

- Ad awareness remained strong, while the refreshed creative achieved notably stronger ratings. Increased media spending did not generate additional awareness compared to last year, but it increased message frequency—which could strengthen the campaign's ability to influence travel. This is an impact that will ultimately be evaluated in Wave 2 ROI research. Insights from the Wave 1 research include:
  - Awareness remained strong and stable. The campaign reached 45% of target travelers (9.95 million households) despite changes in market strategy, including the addition of Florida. Core markets continued to deliver the strongest awareness, while the behavioral targeting effort generated lower awareness than traditional geographic markets.
  - Additional media investment increased frequency but not reach. While overall awareness remained flat, consumers were exposed to the campaign through more media channels, creating stronger message reinforcement that may improve downstream travel influence. Whether this increased frequency translates into more visitation will be measured in Wave 2.
  - The refreshed creative is the campaign's biggest success. Every communication, emotional, and impact measure improved over last year, with nearly all ratings reaching top industry benchmark levels. The creative is particularly effective at communicating New Hampshire's sense of freedom, relaxation, discovery, and unique experiences.
  - Advertising continues to strengthen New Hampshire's brand. Consumers aware of the campaign rated virtually every destination image attribute more positively than those unaware, with especially strong lifts for ease of access, value, discovery, outdoor recreation, and overall destination appeal.
  - External economic conditions may suppress travel regardless of advertising effectiveness. More than one-quarter of travelers say transportation costs are significantly affecting their travel decisions, leading many to take fewer or shorter trips and choose destinations closer to home. These pressures may constrain advertising-influenced visitation overall, although New Hampshire's proximity to its core markets could position it to benefit as travelers seek more accessible, drive-to destinations.

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.
- It is notable that the behavioral target markets demonstrated lower awareness than the core, opportunity, and overall market populations. This suggests that behavioral targeting alone did not result in higher campaign awareness among those audiences.

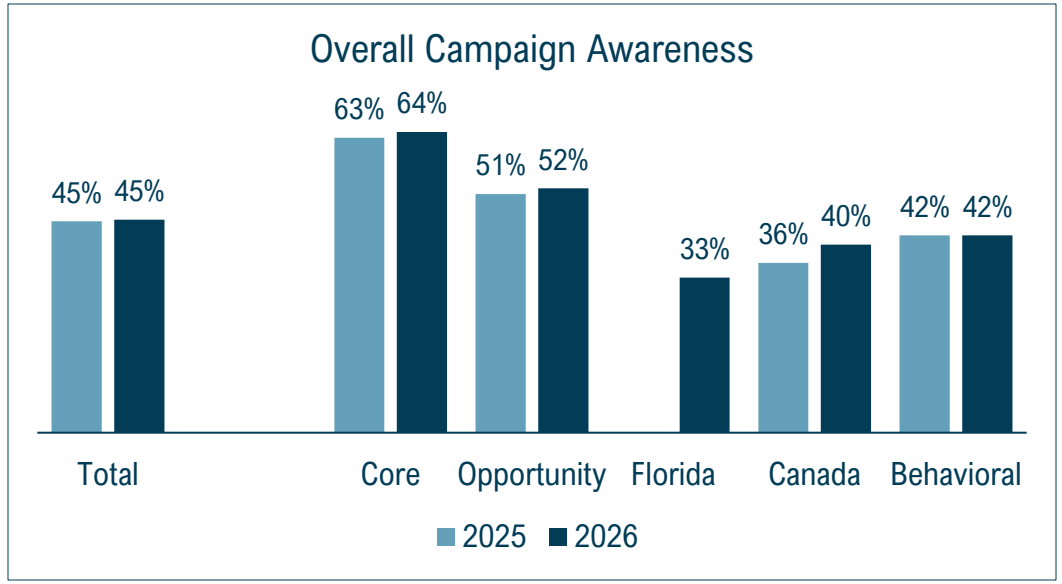
2026 Cost Per Aware Household

	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

- When viewed in the context of overall market spend and cost per aware household, the traditional markets (core, opportunity, Canadian) perform comparably.
- 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, as the additional investments in America250, the supplementary FIFA campaign, and Choose NH were relatively limited and only generated modest incremental awareness.

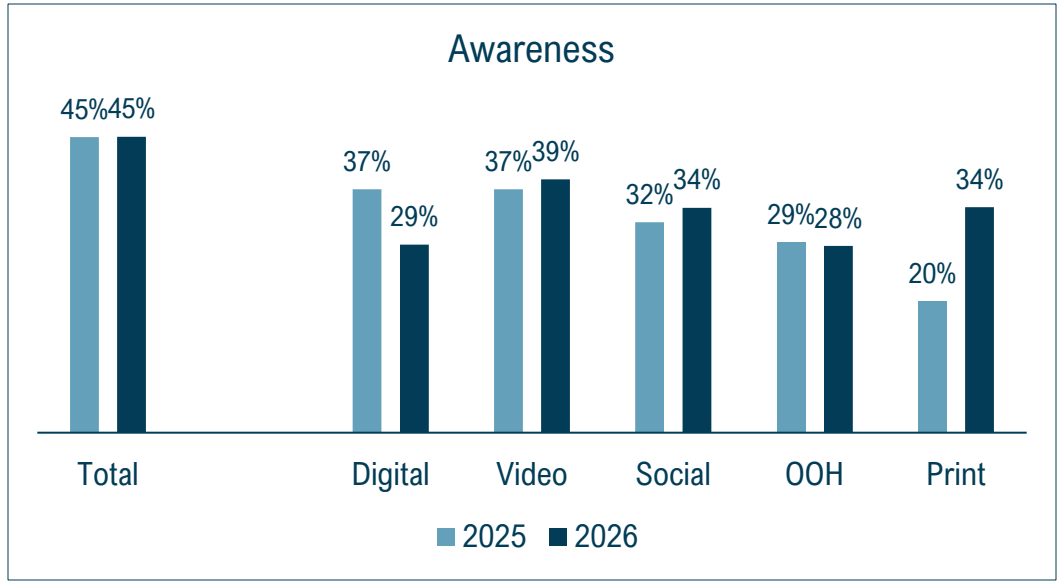
Awareness and Cost Per Aware HH Change



	2025	2026	% Change
Target HHs	21,725,260	21,985,583	1%
Ad Awareness	45%	45%	0%
Ad-Aware HHs	9,776,367	9,952,385	2%
Media Investment	$3,014,576	$3,482,466	16%
Cost per Aware HH	**$0.31**	**$0.35**	**13%**

- Compared with last year, awareness results are largely unchanged, with only modest gains observed in select markets.
- The increase in cost per aware household is primarily a result of higher media investment without a corresponding increase in overall awareness. A significant portion of this change is attributable to the addition of Florida, a market with comparatively lower awareness levels. Despite expanding into this market, the overall target audience size remained largely unchanged due to a 3.5 million household reduction in the behavioral target.

Ad Awareness by Medium

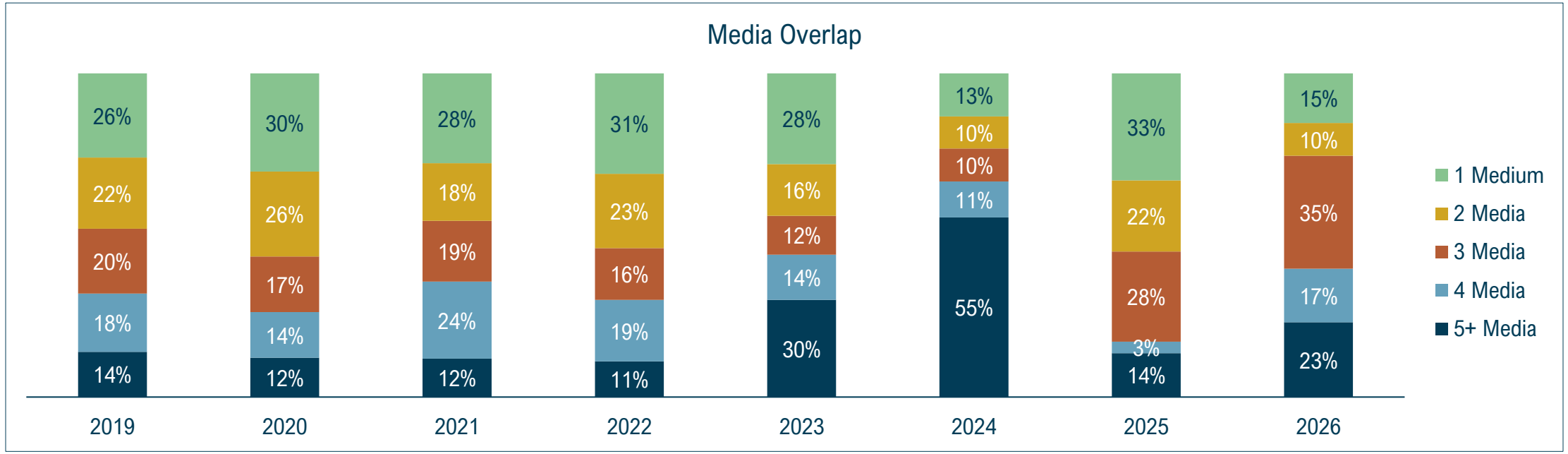


	2025	2026	Change
Print	$51,534	$77,463	$25,929
Video	$1,226,354	$1,497,712	$271,358
OOH	$334,538	$479,932	$145,394
Display	$726,400	$685,732	($40,668)
Social	$560,750	$786,000	$225,250

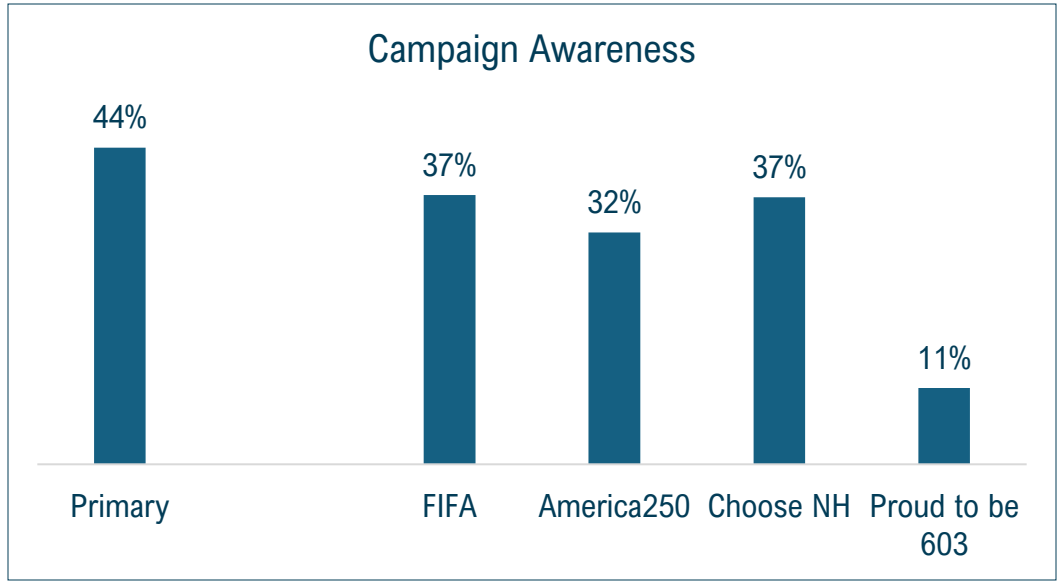
- Changes in awareness by media channel generally mirrored year-over-year changes in media investment. Awareness increased across all channels except digital, reflecting the reduction in digital spend. Print experienced the largest increase in awareness; however, this channel was targeted to a somewhat small audience within the core and opportunity markets.
- Overall campaign awareness remained stable. This suggests greater overlap in media exposure across channels, reducing the incremental reach of each additional medium. Media overlap is examined in more detail on the following slide.

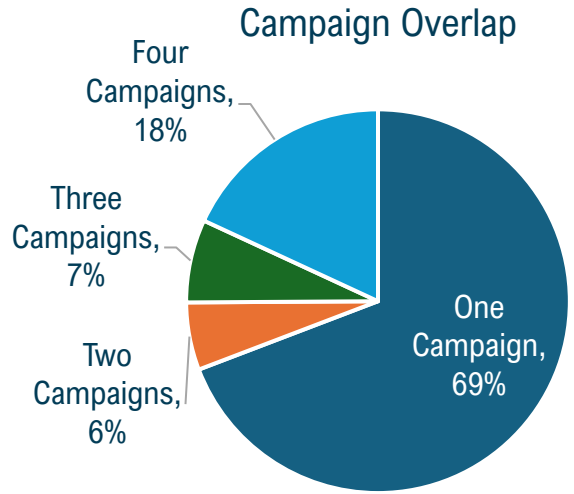
Media Overlap

- 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.



Awareness by Campaign





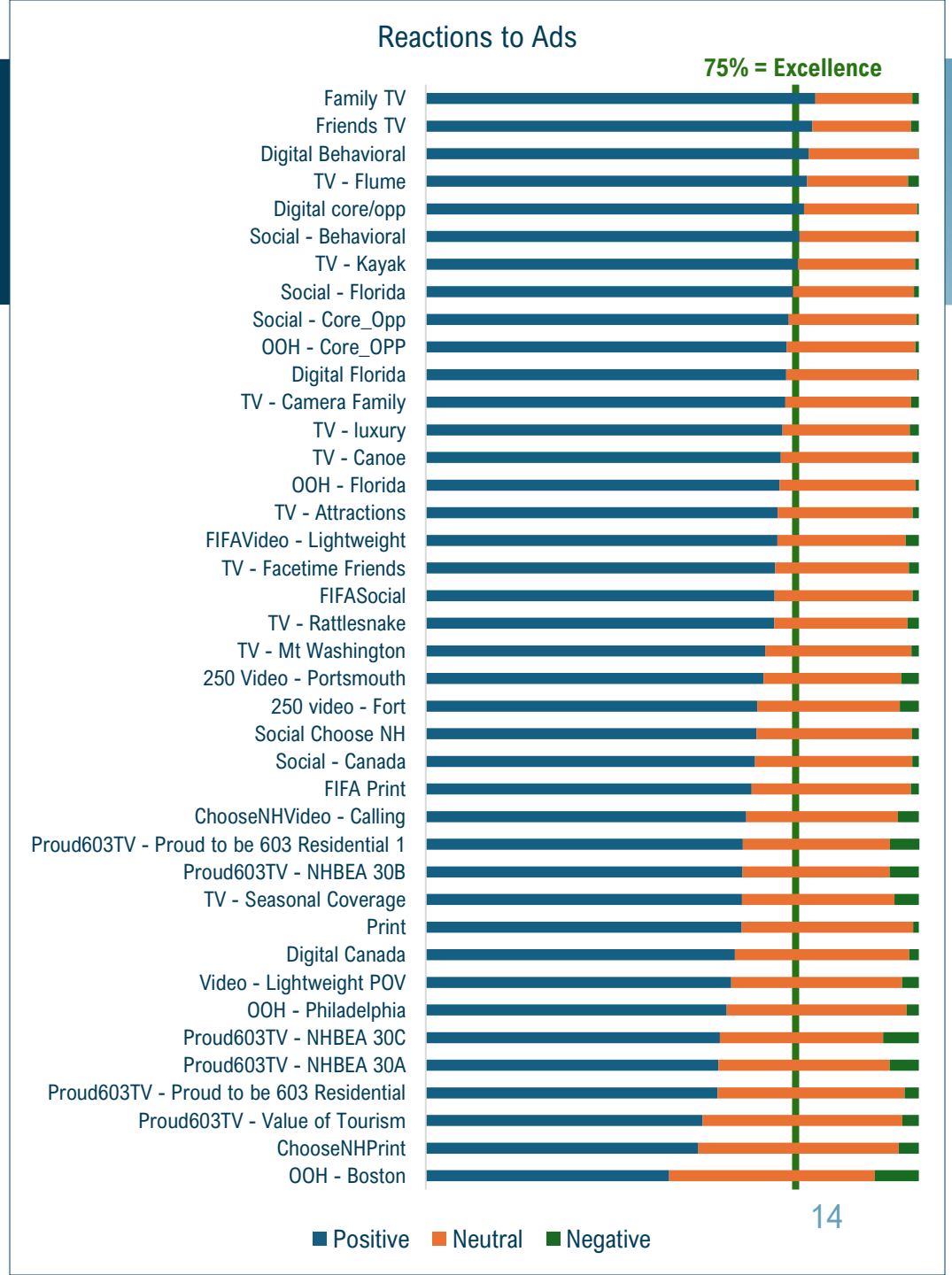
- As noted previously, a portion of the increased media investment was allocated to several smaller, targeted campaigns focused on core markets and in-state audiences. As shown earlier, the primary campaign generated most of the overall awareness, while supplementary efforts primarily increased message exposure rather than expanding campaign awareness.
- Whether this increased message frequency and exposure across multiple campaigns translates into greater levels of visitation is the key question that will be addressed in the Wave 2 research.

Creative Ratings

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Reaction to Ads

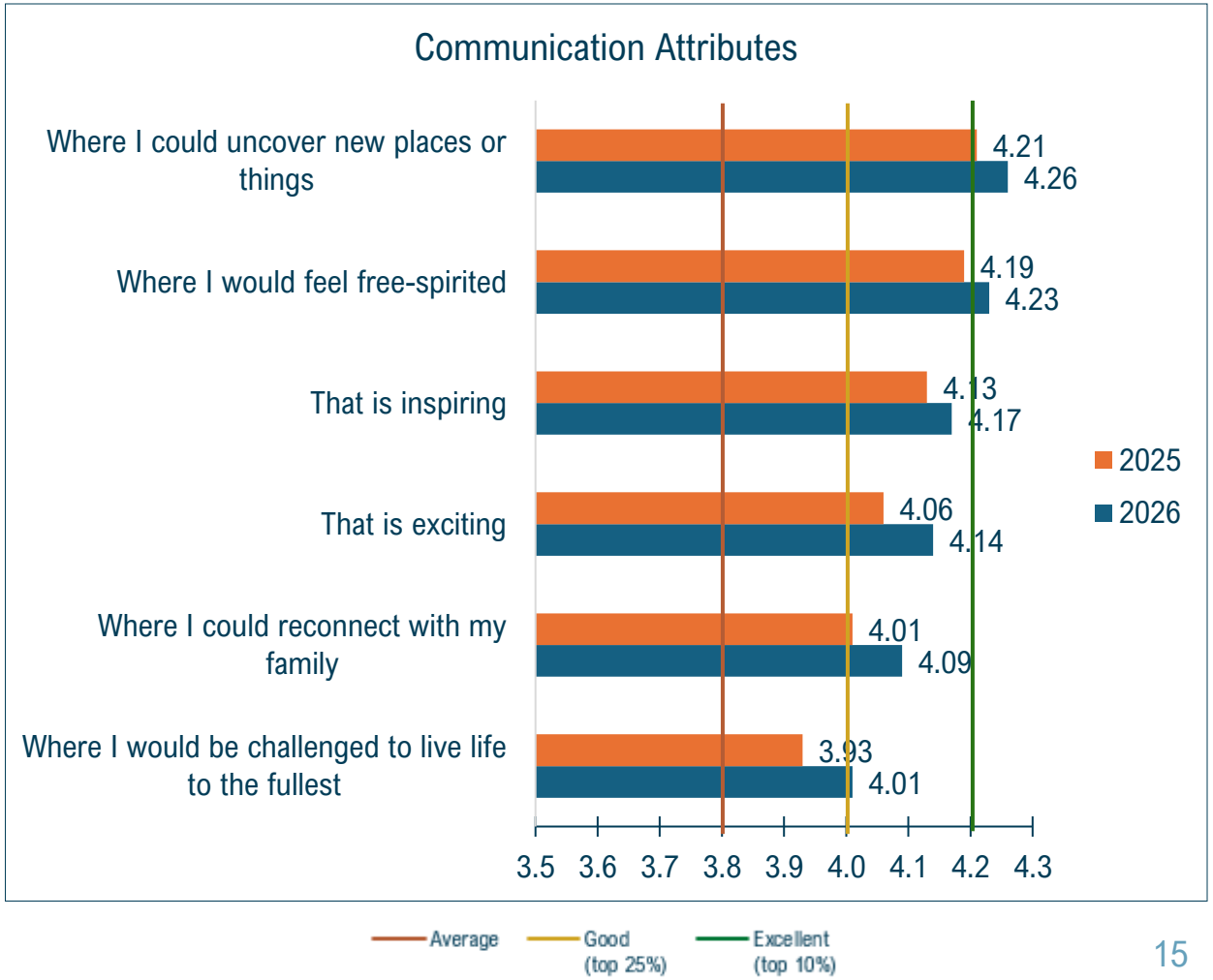
- Awareness is a key measure of campaign success because it quantifies the reach of the marketing effort. However, the ultimate success of a campaign depends on the effectiveness of the creative in influencing consumer behavior. While this is typically evaluated through behavioral outcomes, those results will not be available until the follow-up ROI wave.
- At this stage, the creative can be evaluated through comparative ratings across campaign attributes and overall audience reactions. Respondents were asked whether their impressions of individual campaign executions were positive, neutral, or negative. As a general benchmark, a positive rating of approximately 70% indicates strong performance, while 75% or higher represents excellence.
- The table on the right ranks the individual creative executions and highlights several notable findings. As expected, video executions were the strongest performers, with the two primary television spots receiving the highest overall ratings. Performance across the remaining executions generally reflected the visual appeal and production quality of the creative. At the lower end of the rankings were executions that were less travel-focused, such as Choose NH and Proud to Be 603, along with Boston's out-of-home creative, which was hindered by comparatively weak visual appeal.



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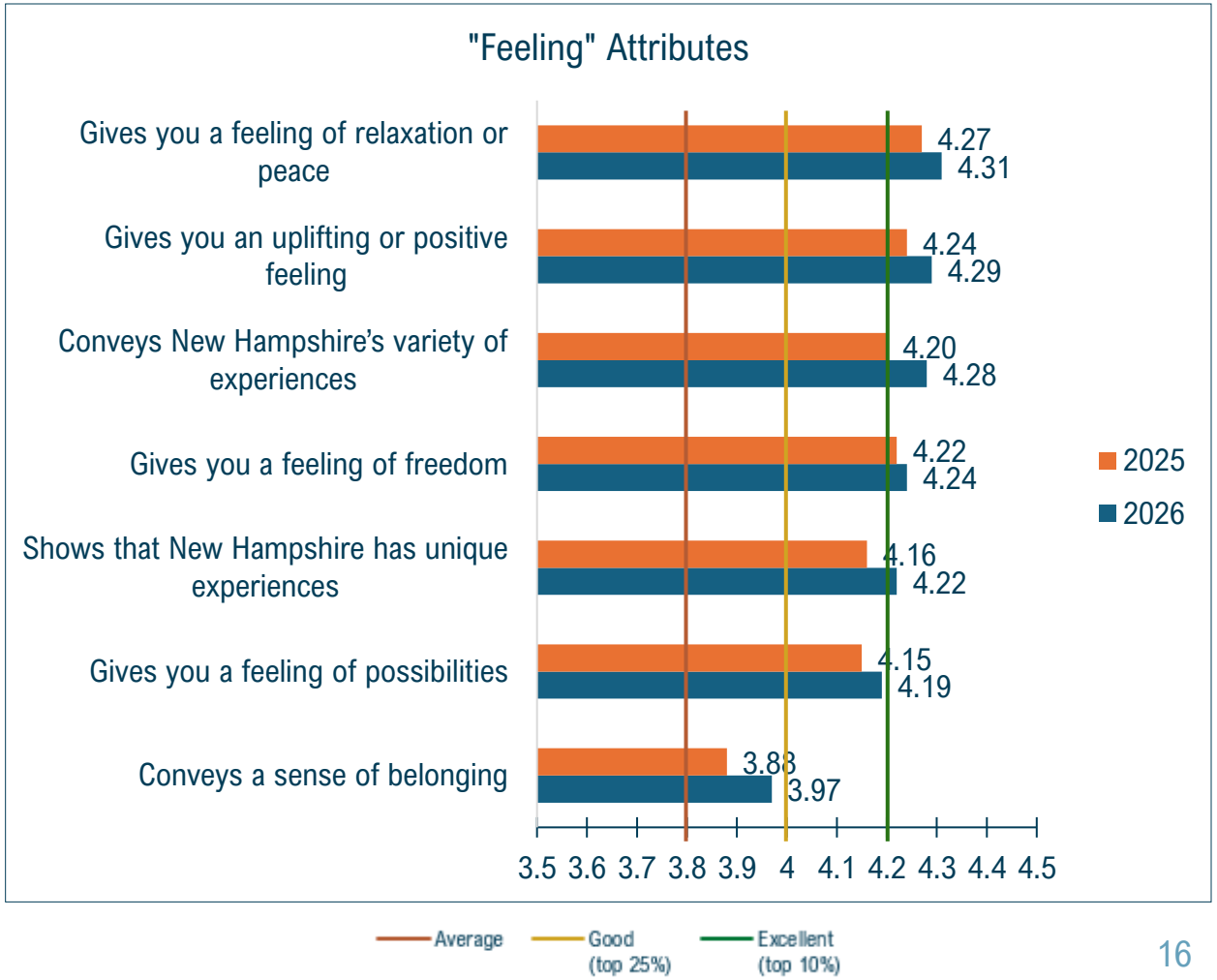
Communication Attributes

- Traditional communication attributes, which have been tracked for several years, provide an additional measure of creative effectiveness. A score of 4.2 represents the top 10% of advertising performance, while a score of 4.0 is considered strong performance and falls within the top 25%.
- Across every attribute measured, this year's campaign received significantly higher ratings than the prior campaign evaluated last year. All measures scored within the top 25% of advertising performance, with "where I could uncover new places or things" and "where I would feel free spirited" achieving excellent ratings.
- The improvement in these creative ratings is particularly notable given that the campaign generated no incremental awareness despite increased media investment. These results may indicate that while overall recall remained stable, the current campaign has the potential to deliver stronger downstream impact through improved creative resonance and engagement.



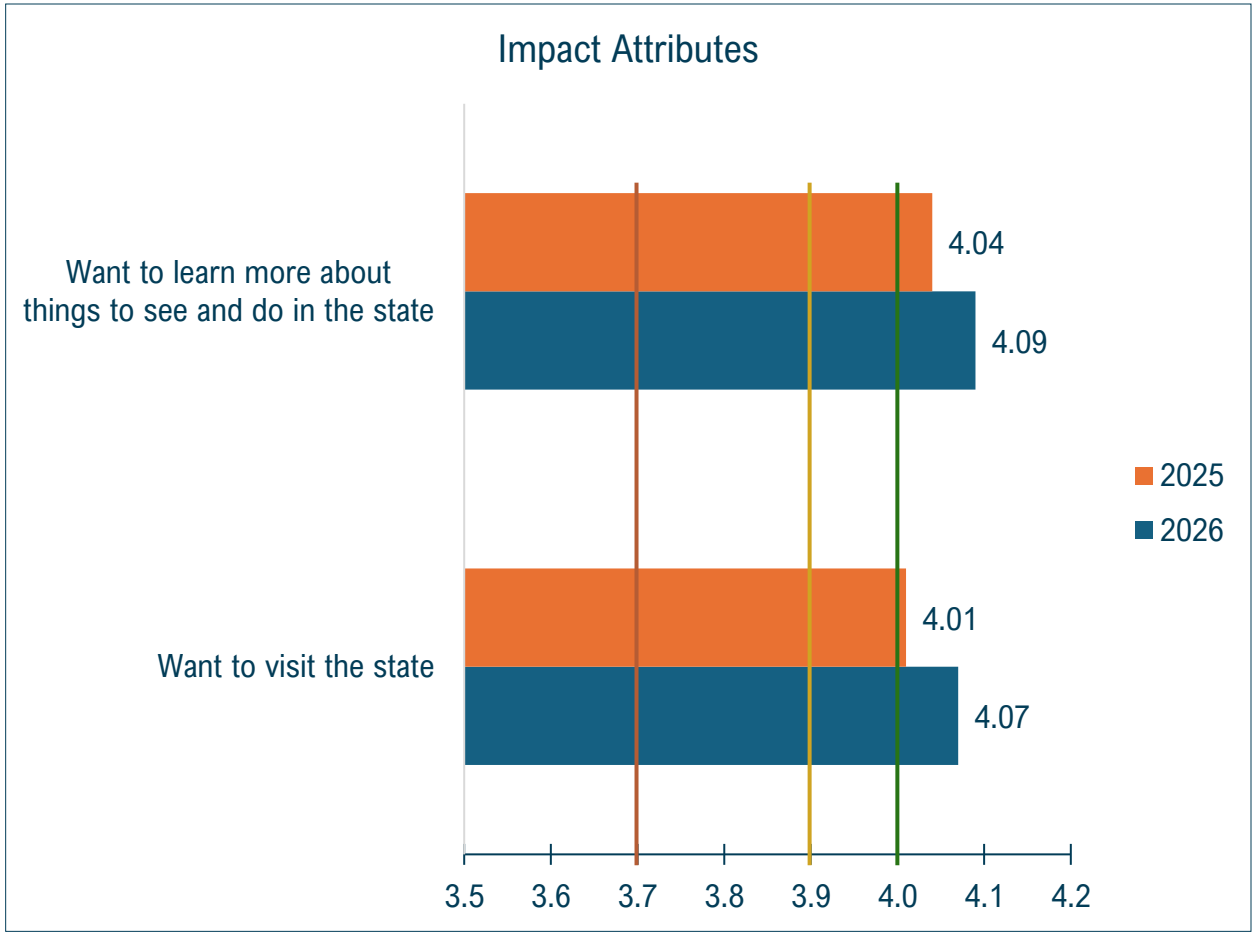
“Feeling” Attributes

- When the creative strategy shifted in 2024 to focus more heavily on emotional connection and specific feelings associated with the destination, a new set of communication attributes was introduced to evaluate this approach.
- While these attributes performed well in previous measures, the current campaign shows significant improvement, with nearly all attributes achieving excellent ratings. These gains represent meaningful improvements in creative effectiveness and provide early indications that the campaign may deliver stronger overall impact, pending validation through behavioral and ROI measures.



Impact Attributes

- Ultimately, visitation is the key measure of campaign success. Until the ROI wave provides a direct assessment of behavioral impact, impact attribute ratings serve as the strongest available indicator of the campaign's potential effectiveness.
- For these measures, a score of 4.0 is generally considered excellent performance. Consistent with every other evaluation examined to this point, the current campaign significantly outperforms the prior effort, indicating stronger consumer engagement and greater potential to influence future travel behavior.



Ad Ratings Among Targets

Stronger Rating
Average Rating
Weaker Rating

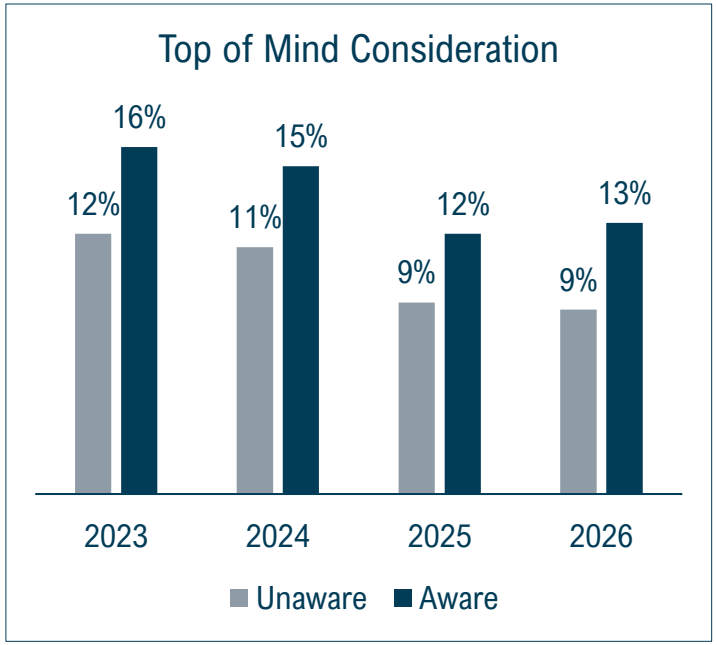
- To better understand the strength of these ratings, it is helpful to evaluate performance across the different target markets.
- Unsurprisingly, the core market generally outperforms all other markets, particularly on the impact attributes. Interestingly, Florida also ranks among the stronger-performing markets. In this case, the results may reflect the distinctiveness and visual appeal of the destination compared with the experiences Floridians encounter in their everyday environment.
- The comparatively weaker performance of the opportunity market is somewhat unexpected given its geographic proximity to the destination relative to the broader behavioral target. Canada's lower performance likely reflects the broader challenges in the current U.S.–Canada relationship.
- Finally, while stronger performance might be expected among behavioral target audiences given the campaign targeting strategy, the broad appeal of the campaign messaging appears to have reduced differentiation between target and non-target audiences. Notably, individuals within the behavioral target did not demonstrate higher awareness levels than the broader market populations.

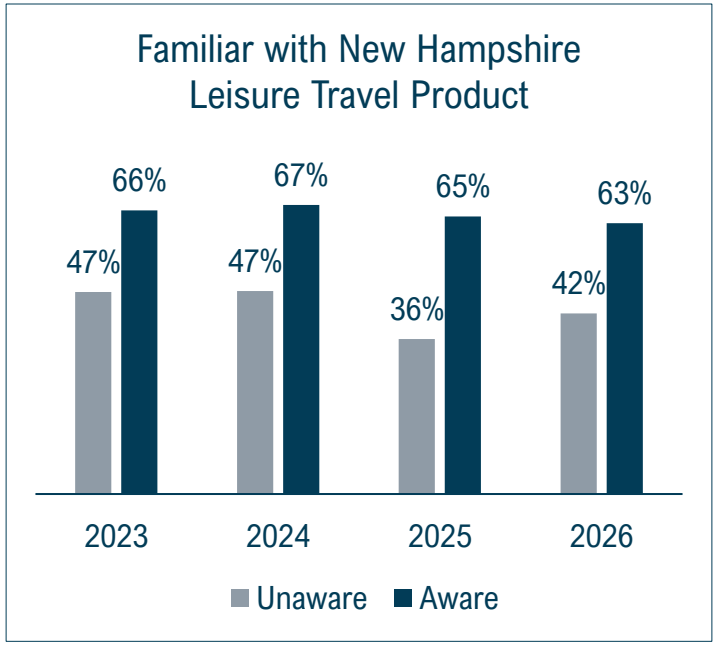
Communication Attributes	Core	Opportunity	Florida	Canada	Behavioral
That is inspiring	4.26	4.04	4.23	4.02	4.20
Where I could reconnect with my family	4.25	4.11	4.06	3.78	4.07
Where I would feel free-spirited	4.33	4.20	4.26	4.11	4.20
Where I would be challenged to live life to the fullest	4.06	3.92	4.02	3.90	4.04
Where I could uncover new places or things	4.28	4.22	4.30	4.08	4.28
That is exciting	4.22	4.06	4.17	3.99	4.15
Feeling Attributes	**Core**	**Opportunity**	**Florida**	**Canada**	**Behavioral**
Conveys a sense of belonging	4.06	3.86	4.00	3.70	4.00
Gives you a feeling of freedom	4.35	4.19	4.29	4.10	4.21
Gives you a feeling of relaxation or peace	4.38	4.28	4.36	4.13	4.30
Gives you a feeling of possibilities	4.25	4.09	4.23	4.00	4.21
Gives you an uplifting or positive feeling	4.35	4.20	4.35	4.07	4.31
Conveys New Hampshire's variety of experiences	4.35	4.22	4.28	4.13	4.30
Shows that New Hampshire has unique experiences	4.24	4.12	4.29	4.04	4.25
Impact Attributes	**Core**	**Opportunity**	**Florida**	**Canada**	**Behavioral**
Want to learn more about things to see and do in the state	4.18	4.03	4.06	3.80	4.13
Want to visit the state	4.28	3.99	4.01	3.83	4.07

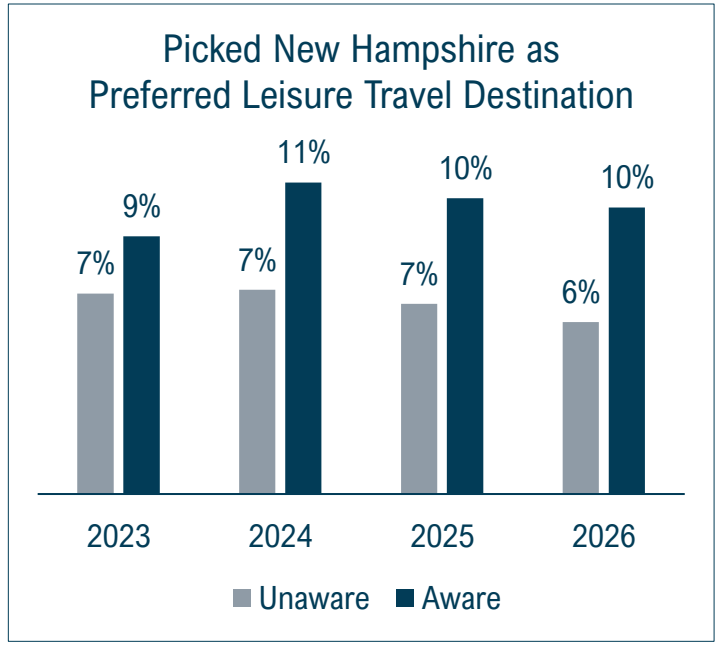
Advertising Impact

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Ad Impact on Top of Mind, Familiarity and Preference



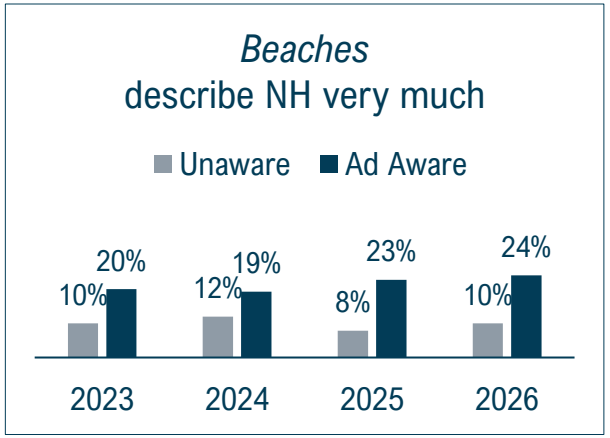


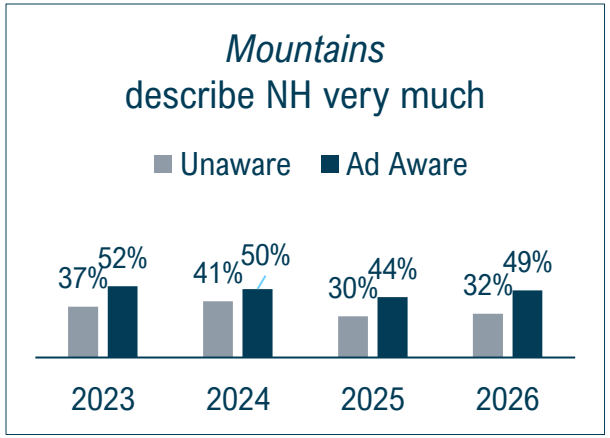


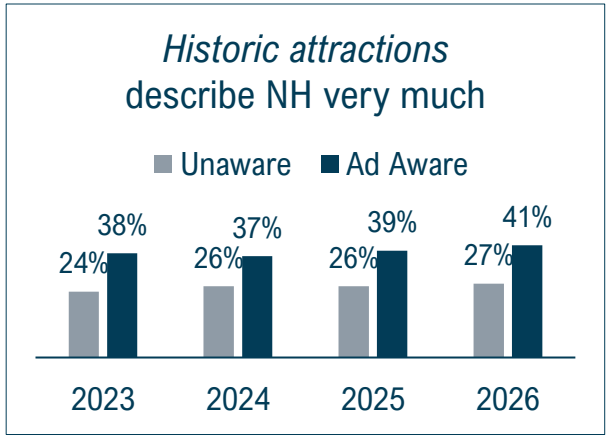
- The advertising continues to positively influence key brand metrics, including top-of-mind consideration, familiarity with New Hampshire, and overall preference.

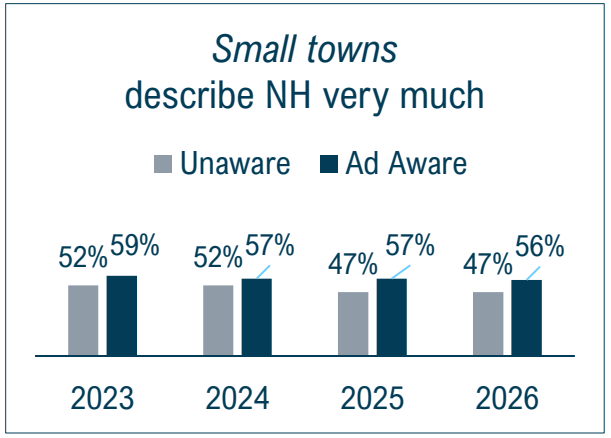
Ad Impact on Perceptions

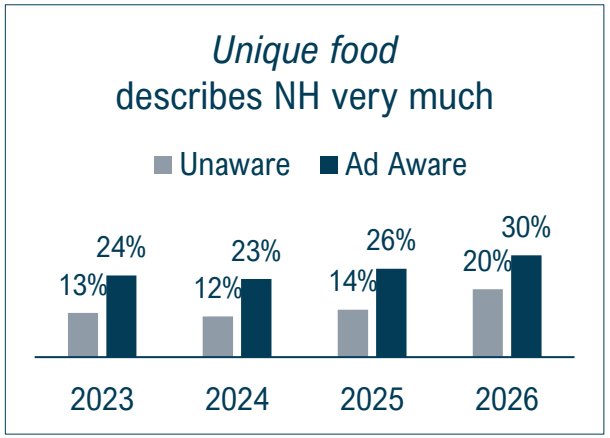
- The advertising tends to lift perceptions of New Hampshire in all regards.

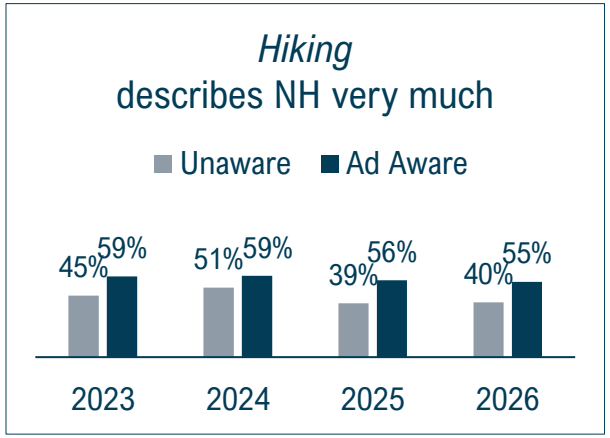


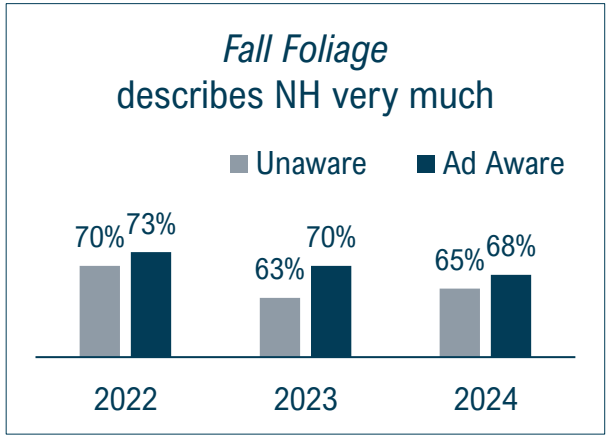












Ad Impact on Perceptions

- Consumers who are aware of the advertising provide stronger ratings across all image attributes compared with those who are unaware. Rather than driving isolated gains in any single attribute, the campaign has elevated overall perceptions of New Hampshire modestly and consistently across categories.
- This year, the ad-aware respondents rated nearly all image attributes as excellent. In contrast, the ad-aware audience last year rated only about half of the attributes at that level—demonstrating broader, more positive impact from the current campaign.

	Unaware	Aware	Lift
A good place to view fall foliage	4.23	4.37	0.14
Beautiful	4.12	4.36	0.24
Natural beauty and scenic landscapes	4.15	4.35	0.20
A peaceful place	4.06	4.29	0.23
Relaxing	4.02	4.29	0.27
Offers lots of outdoor recreation	4.03	4.26	0.23
Offers a clean and healthy environment	3.97	4.23	0.25
Safe	3.99	4.22	0.24
A good place to explore	3.95	4.22	0.27
Good hiking	3.97	4.21	0.24
Charming	3.97	4.21	0.23
Mountain scenery	3.93	4.20	0.27
A good place for me to stroll around	3.96	4.20	0.23
Has a variety of landscapes	3.94	4.20	0.25
A good place for a road trip	3.95	4.18	0.24
Friendly people and welcoming atmosphere	3.87	4.16	0.29
A great place for winter sports such as skiing and snowmobiling	3.96	4.15	0.19
A good place to vacation when traveling without children	3.88	4.13	0.24
Is easy to get to	3.71	4.13	0.41
Has great parks	3.81	4.12	0.31
Fun	3.79	4.11	0.32
A wide variety of activities	3.80	4.11	0.31
Always has something new to discover	3.73	4.08	0.35
A good place for fairs and festivals	3.78	4.08	0.30
A good place to reconnect with family and friends	3.75	4.07	0.32
Is unique because of the variety of destinations and activities it offers	3.73	4.06	0.32
A place to pursue health and wellness activities	3.79	4.05	0.27
A good value for my money	3.66	4.04	0.38
Has interesting historical sites and museums	3.76	4.03	0.27
Is a kid-friendly vacation destination	3.72	4.02	0.30
A good place for craft beverages – breweries, wineries, cideries, distilleries	3.67	4.01	0.33
A good place for agritourism such as U-pick farms and farm tours	3.73	4.00	0.27
Affordable	3.60	3.94	0.34
Excellent restaurants	3.64	3.94	0.29
Exciting	3.62	3.94	0.31
Romantic	3.63	3.93	0.29
Rich in culture and the arts	3.56	3.88	0.32
A good place for shopping	3.54	3.88	0.34
A good place for culinary activities	3.58	3.87	0.29
A good place for water activities	3.48	3.86	0.38
A good place to go to the beach	3.17	3.65	0.47

Destination Ratings Benchmarks
4.0 or above = Excellent (top 10%)
3.75 – 3.99 = Good (top 25%)
3.5 – 3.749 = Average
Less than 3.5 = Below Average

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Ad Impact on Halo Attributes

- While tourism advertising is not specifically designed to build broader halo perceptions, it can—and does—positively influence them.
- The Choose NH campaign is specifically focused on positioning the state as a place to live; as a result, it has a significantly stronger impact on perceptions of business opportunities and career potential.

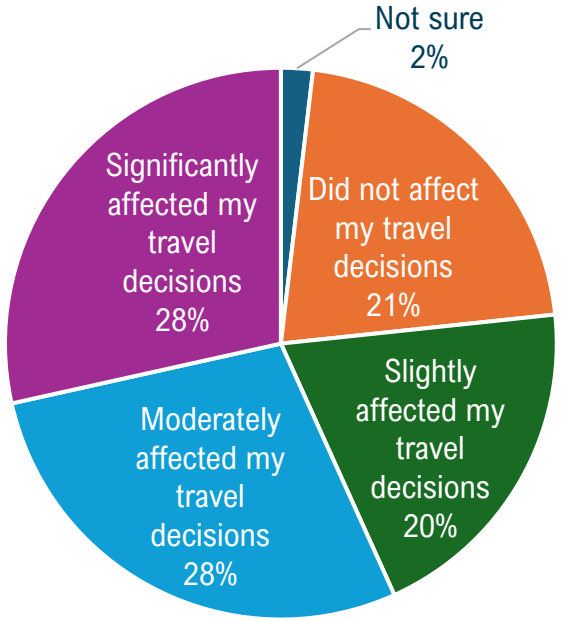
	Overall	Unaware	Aware	Lift
A good place to live	3.82	3.63	4.02	0.39
A good place to purchase a vacation home	3.41	3.20	3.62	0.42
A good place to retire	3.42	3.22	3.62	0.41
A good place to attend college	3.68	3.49	3.87	0.37
A good place to attend a meeting, conference or trade show	3.78	3.58	3.98	0.41
A good place to start a business	3.68	3.46	3.92	0.46
A good place to start a career	3.40	3.20	3.61	0.41
A good place to relocate a business	3.64	3.45	3.83	0.38

	Unaware Of Choose NH	Aware Of Choose NH	Lift
A good place to relocate a business	3.03	3.79	0.76
A good place to start a career	3.01	3.74	0.73
A good place to start a business	3.08	3.73	0.65
A good place to retire	3.49	4.14	0.65
A good place to attend a meeting, conference or trade show	3.41	4.00	0.59
A good place to purchase a vacation home	3.64	4.20	0.56
A good place to live	3.67	4.16	0.49
A good place to attend college	3.51	3.97	0.46

Impact of Transportation Costs

- There has been significant volatility affecting the travel landscape over the past several years, driven by international events and, more recently, inflation and rising travel costs. For that reason, this wave of research explored how cost pressures affect traveler perceptions and behavior.
- More than one-quarter of respondents indicated that cost pressures significantly impact their travel plans. The anticipated behavioral changes remain consistent with historical patterns: taking fewer trips, traveling shorter distances, staying closer to home, and reducing overall spending.
- These pressures may constrain advertising-influenced visitation overall. However, New Hampshire's proximity to its core markets could position it to capture demand as travelers seek accessible, drive-to destinations. This will be explored in the Wave 2 research.

Impact of Transportation Cost on Travel



Of those affected	
Taken fewer trips	45%
Chosen destinations closer to home	35%
Taken shorter trips	33%
Reduced spending on dining	33%
Reduced spending on activities/attractions	29%
Delayed or postponed a trip	28%
Chosen lower-cost accommodations	27%
Driven instead of flying	23%
Canceled a trip entirely	13%
No changes made	13%

Appendix: Questionnaire

Questionnaire

New Hampshire Tourism
2026 Spring/Summer Ad Effectiveness Wave 1
June 2026

SCREENER MODULE

S1. What is your postal/ZIP code? _____

S2. Please indicate if each of the following describe you.

ROTATE	Yes	No
I regularly use social media like Facebook, X, Instagram, or TikTok		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0 and Planning = 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 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 (IF =0 and Normally = 0, TERMINATE AFTER SCREENING QUESTIONS)		
I listen to Pandora Radio		

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

S4. What is your age? _____ [TERMINATE under 18, 66+]

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

PERCEPTIONS MODULE

P1. 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_____

P1a. How appealing is each of the following when you are traveling for leisure?

[ROTATE]	1 Not at all appealing	2 Not very appealing	3 Somewhat appealing	4 Very appealing
Beaches				
Mountains				
Historic attractions				
Small towns				
Unique food				

Fall foliage				
Hiking				

P1b. Which of the following do you use for leisure travel inspiration/ideas or to decide where to travel?

ROTATE, ANCHOR "NONE"	
Printed visitors guides	
Digital visitors guides	
Destination websites	
Destination Facebook page	
Destination X page	
Destination Instagram page	
Social media influencers	
YouTube	
TikTok	
Instagram reels	
None of these	

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					

Questionnaire

Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

P4. 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	

ASK FOR EACH ATTRACTION TYPE THAT IS AT LEAST SOMEWHAT APPEALING FROM P1a:
P4a. How well does ATTRACTION TYPE FROM P1a describe each of these states?

[ROTATE]	1 Not at all	2 Not very much	3 Somewhat	4 Very much
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

P5. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes STATE.

FOR P5 AND P5A, HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST NOT VERY FAMILIAR AT Q2.

[ROTATE]	Strong lv	2	3	4	Strong lv
Fun					
Exciting					
Always has something new to discover					
Beautiful					
Rich in culture and the arts					
A good place for culinary activities					
A good place for agritourism such as U-pick farms, farm tours					
Has great parks					
Offers lots of outdoor recreation					
Safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers					
Has interesting historical sites and museums					
A great place for winter sports such as skiing and snowmobiling					
A good place for shopping					
A good place to vacation when traveling without children					
Affordable					
A good place for fairs and festivals					
A good place to go to the beach					
A good place for water activities					
Relaxing					
Romantic					
Excellent restaurants					
Natural beauty and scenic landscapes					
Offers a clean and healthy environment					
Charming					

[ROTATE]	Strong lv	2	3	4	Strong lv
Friendly people and welcoming atmosphere					
A good place for me to stroll around					
A good value for my money					
A good place for a road trip					
Has a variety of landscapes					
A good place to view fall foliage					
A good place to reconnect with family and friends					
A peaceful place					
A good place to explore					
Mountain scenery					
Good hiking					
A place to pursue health and wellness activities					
A good place for craft beverages – breweries, winteries, cideries, distilleries					
A wide variety of activities					

P5a. How much do you agree that each of these statements describes STATE?

[ROTATE]	Strong lv	2	3	4	Strong lv
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					

P6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?
Requested a New Hampshire Visitor's Guide

Questionnaire

Visited the New Hampshire Tourism site, www.visitnh.gov
Visited the Visit New Hampshire Facebook page
Followed Visit New Hampshire on X
Followed Visit New Hampshire on Instagram
Received e-newsletter
Visited the New Hampshire Pinterest page
Requested information about a New Hampshire trip in another way
None of these

T1. Have you traveled to or within any of the following states for a leisure trip in the last 12 months?

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

IF T1 = NEW HAMPSHIRE ASK

T2 Which of the following activities did you participate in during your trip to or within New Hampshire? *Select all that apply*. [ROTATE]

Hiking
Biking
Camping
Non motorized boating
Golfing
Off-highway recreational vehicles like ATV or trail bike
Going to concerts
Going to plays

Enjoying craft beverages from New Hampshire breweries, cideries and wineries

T3. Thinking about these activities on your trip(s) to/in New Hampshire in the past 12 months, approximately how much did you spend on average over the course of the year on this activity and related purchases or expenses like equipment and fees?

SHOW ACTIVITIES FROM T2

Hiking	
Biking	
Camping	
Non motorized boating	
Golfing	
Off-highway recreational vehicles like ATV or trail bike	
Going to concerts	
Going to plays	
Enjoying craft beverages from New Hampshire breweries, cideries and wineries	
Total	SHOW TOTAL

AD AWARENESS MODULE
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

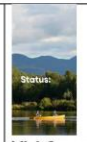
Canada
I:\Ads Master\New Hampshire\2026\Summer\OneDrive_2026-06-05\Summer 2026\Primary Summer\Standard Display\Canada\SummerVisit26_Canada_French_300x600.zip



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**

Questionnaire

 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

What is your reaction to these ads?

Positive
Neutral
Negative
Positive
Neutral
Negative

TV:
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



https://vimeo.com/1199800526

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

Yes
No

TVB. What is your reaction to this ad?

Positive
Neutral
Negative

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

Questionnaire

SMARInsights






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



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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

What is your reaction to these ads?
- Positive
- Neutral
- Negative

OOH:

CORE_OPP

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



BOSTON

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



SMARInsights



https://vimeo.com/1090502249

PHILADELPHIA

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

ASK AFTER ALL ADS

What is your reaction to these ads?
- Positive
- Neutral
- Negative

PRINT:

SHOW TO CORE_OPP MARKETS ONLY

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

Questionnaire



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



Screenshot 2026-06-08 145948.jpg



Native Newsletter.jpg

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

What is your reaction to these ads?
Positive
Neutral
Negative

AD RATINGS MODULE

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

[ROTATE]	Strongly disagree				Strongly agree
That is inspiring	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
That is exciting	1	2	3	4	5

28a. How much do you agree that this campaign...?

ROTATE	Strongly disagree				Strongly agree
Conveys a sense of belonging	1	2	3	4	5
Gives you a feeling of freedom	1	2	3	4	5
Gives you a feeling of relaxation or peace	1	2	3	4	5
Gives you a feeling of possibilities	1	2	3	4	5
Gives you an uplifting or positive feeling	1	2	3	4	5
Conveys New Hampshire's variety of experiences	1	2	3	4	5
Shows that New Hampshire has unique experiences	1	2	3	4	5

29. How much do you agree that this campaign makes you...?. ROTATE

	Strongly disagree				Strongly agree
Want to learn more about things to see and do in the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

FIFA, AMERICA 250
CORE_OPP
TV:



https://vimeo.com/1199828780

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



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

Questionnaire

TVB. What is your reaction to this ad?
- Positive
- Neutral
- Negative

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


BostonGlobe.jpg



DTTD_26_Jeep_BostonGlobe_Advert.jpg

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


BG.jpg

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

What is your reaction to these ads?
- Positive
- Neutral

- Negative

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


Screenshot 2026-06-05 at 8.45.41 AM.jpg



Screenshot 2026-06-05 at 8.45.08 AM.jpg


Screenshot 2026-06-05 at 8.45.11 AM.jpg



Screenshot 2026-06-05 at 8.45.36 AM.jpg

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


Screenshot 2026-06-05 at 8.48.03 AM.jpg



Screenshot 2026-06-05 at 8.47.23 AM.jpg


Screenshot 2026-06-05 at 8.47.28 AM.jpg



Screenshot 2026-06-05 at 8.47.32 AM.jpg


Screenshot 2026-06-05 at 8.47.19 AM.jpg

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

What is your reaction to these ads?
- Positive
- Neutral
- Negative

Choose NH
CORE_OPP-excluding NH



https://vimeo.com/1199843847

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

TVB. What is your reaction to this ad?
- Positive
- Neutral
- Negative

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


Screenshot 2026-06-09 133806.jpg

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

What is your reaction to these ads?
- Positive
- Neutral

Questionnaire

Negative

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

What is your reaction to these ads?
Positive
Neutral
Negative

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



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

TVB. What is your reaction to this ad?
Positive
Neutral
Negative

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
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 live in your household? [IF 1, SKIP TO D4]

D3. How many children under the age of 18 live in your household?

D4. Which of the following categories represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate degree

Questionnaire

SMARInsights

D5. Which of the following categories best represents your total annual household income before taxes?

USA ONLY:
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

CANADA ONLY:
Less than $35,000 CAD
$35,000 but less than $50,000 CAD
$50,000 but less than $75,000 CAD
$75,000 but less than $100,000 CAD
$100,000 but less than $150,000 CAD
$150,000 but less than $200,000 CAD
$200,000 or more CAD

D6. Which of the following best describes your ethnic heritage? Are you...? (ALLOW MULTI)
African-American/Black
Asian
American Indian or Alaska Native
Caucasian/White
Hispanic/Latino
Middle Eastern or North African
Native Hawaiian or Other Pacific Islander
Other (Specify _____)

D7. What is your preferred gender identity?
Male
Female
Non-binary
Prefer not to answer