



New Hampshire Department of
**BUSINESS AND
ECONOMIC AFFAIRS**

FY26/FY27

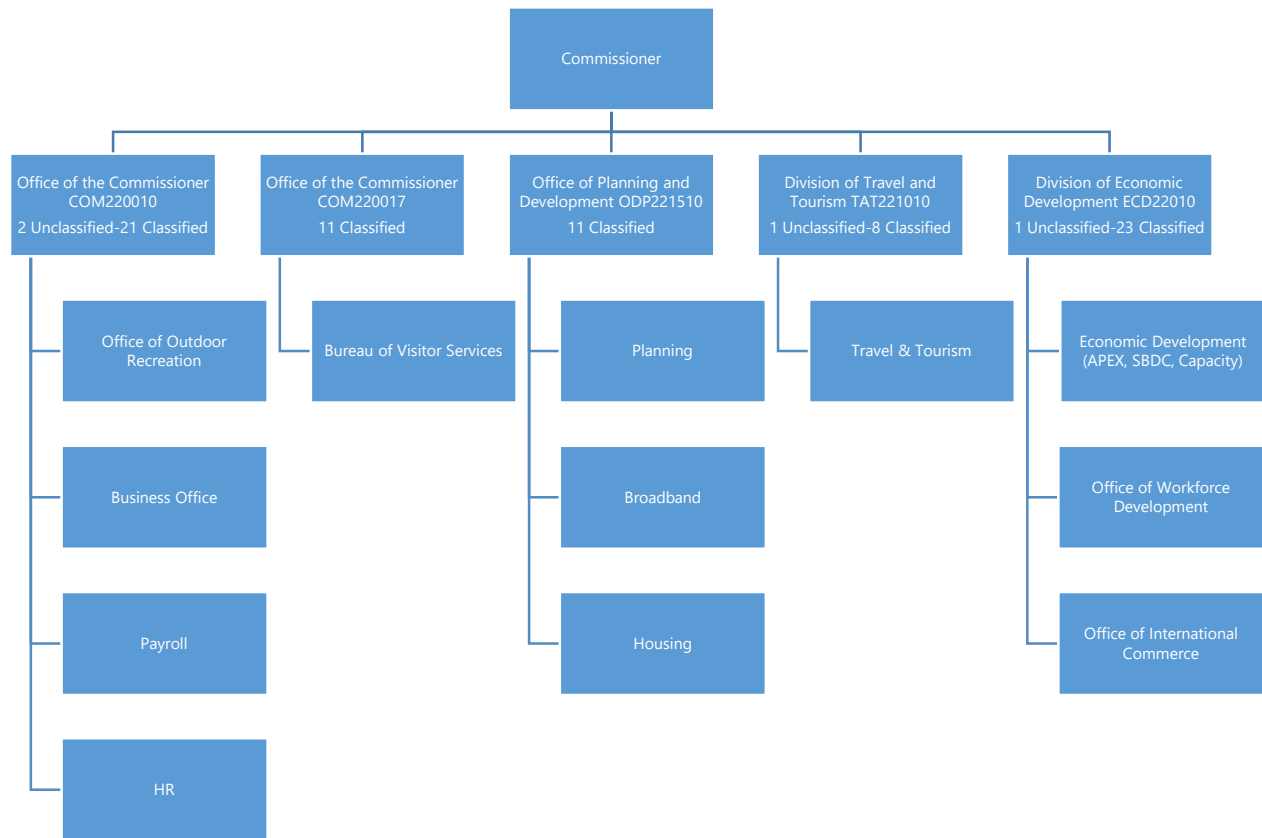
Operating Budget Presentation Follow-up

House Finance Committee

Meeting Date: January 22, 2025

Agency Organizational Structure

Organizational Structure with FTE count:



Totalling the positions reported on pages 6 to 11 of the original House Finance Committee presentation document distributed is higher than the total number of 78 positions because the Bureau of Visitor Services (BVS) and the Office of Outdoor Recreation (ORID) are budgeted in the Office of the Commissioner (OOC) so their position count was included on the OOC detail sheet. BVS and ORID also have a detail sheet included in the presentation because their purpose was important to highlight separate from the other functions of the Office of the Commissioner, so their respective head counts were listed again. Therefore, BVS and ORID's FTE count are doubled when adding 6 to 11 creating the discrepancy mentioned during testimony.

Broadband Overview

ARPA – Broadband Office Standup funding – SLFRF Funding

Award - \$659,734

Fully expended

These funds were used to setup the Broadband office and hire staff tasked with both fulfilling the program objectives of the Broadband federal program initiatives as well as necessary extensive reporting requirements.

ARPA Coronavirus Capital Projects Fund (CPF)

Award - \$122,066,151

Fully Obligated with \$56.9M+ expended to date.

This money is being used to fund the Broadband office (team of 5) and to buildout broadband service to approximately 51,000 previously unserved and underserved addresses in the most rural parts of the State. These include residential, business, and school addresses.

Infrastructure Investments & Jobs Act (IIJA) a/k/a Bipartisan Infrastructure Law (BIL)

Broadband Equity, Access & Deployment Program

Per law, this fundings number one priority is to provide broadband access to any / all unserved and underserved locations in the State

Two awards

1. Planning Grant in the amount of \$5,000,000
2. Implementation Grant in the amount of \$191,560,278.97

Planning Grant:

- Program Guidelines are outlined in the original Notice of Funding Opportunity
- Planning Grant funds have been fully obligated
- \$2.43M+ have been expended to date.

Implementation Grant:

- Full award is \$191,560,278.97 for this Grant
- Funding controls are set to release funds in phases
- Current available allocation is \$12,358,493.92
- Funding not yet obligated

Committees/Commissions/Boards

Yellow highlight indicates BEA RSA

Not BEA Mission Relevant Commissioner Obligation List (unless otherwise specified)

	Authority
Council for Thriving Children	EO 2020-03
Division of Ports and Harbors Advisory Council	12-G:44 I
New Hampshire Commission on Native American Affairs (Dir DTTD)	12-A:14-a
New Hampshire Land and Community Heritage Authority (LCHIP)	227-M:4
New Hampshire Transportation Council	238-A:2
Site Evaluation Committee (alternate)	162-H:3 VI
Solid Waste Working Group	149-M:61

BEA Mission Relevant Commissioner Obligation List (unless otherwise specified)

	Authority
Advisory Council on Emergency Preparedness and Security (Dir OPD)	21-P:48 I
Advisory Council on Career and Technical Education	188-E:10-b
Agricultural Lands Preservation Committee (Dir OPD)	432:19
Aquatic Resource Compensatory Mitigation Site Selection Committee (Dir OPD)	482-A:32
Commission on Demographic Trends	12-O:55-a
Community College System of NH Board of Trustees	188-F:4
Community Development Advisory Committee	162-L:15
Community Development Finance Authority (CDFA)	162-L:2
Council of Partner Agencies (CoPA)	12-O:7
Council on Housing Stability	EO 2020-22
Council on Resource and Development (CORD)	162-C:1
Geographic Information System (GIS) Committee (Dir OPD)	4-F:1 II 6
New Hampshire Canadian Trade Council	12-O:22
New Hampshire Drinking Water and Groundwater Advisory Commission (Dir DED)	485-F:4-g
New Hampshire Housing Champions program advisory committee	12-O:76
New Hampshire Ireland Trade Council	12-O:22-a
New Hampshire Lakes Management Committee (Dir OPD)	483-A:6 III
New Hampshire Statewide Trails Advisory Committee (OPD)	216-F:5
New Hampshire US Mexico Canada Trade Council (USMCA)	EO 2020-02
Offshore Wind and Port Development Commission	374-F:10
Offshore Wind Industry Workforce Training Center Committee	12-O:51-a
Public Water Access Advisory Board (Dir OPD)	233A:2-f
Rivers Management Advisory Committee (Dir OPD)	483:8 II
State Workforce Innovation Board (SWIB)	12-O:44
Statewide Interoperability Executive Committee (SIEC)	21-P:48 IV
Wetlands Council (Dir of OPD)	21-O:5-a

Welcome Center Information

	Name:	Dsg:	Funding	Hrs. of Op	Avg. Hrs. Annually	FY 2024 Foot Count	FY 2024 GSA Vol. Hrs./YR
1	Canterbury	HWY	GF	Daily, 9am-5pm	2,912	175,982	138
2	Colebrook	HWY	GF	Daily, 9am-5pm	2,912	31,940	0
3	Hooksett NB	TPK	TPK	Daily, 9am-5pm	2,912	1,869,492	6
4	Hooksett SB	TPK	TPK	Daily, 9am-5pm	2,912	1,854,383	4
5	Intervale	HWY	GF	Daily, 9am-5pm	2,912	136,855	0
6	Lebanon	HWY	GF	Daily, 9am-5pm	2,912	147,989	0
7	Littleton	HWY	GF	Daily, 9am-5pm	2,912	101,256	0
8	Salem	HWY	GF	Daily, 8am-10pm	5,096	239,052	9
9	Sanbornton	HWY	GF	Daily, 9am-5pm	2,912	188,802	13
10	Seabrook	TPK	TPK	Daily, 24 hrs.	8,760	813,318	282
11	Springfield	HWY	GF	Daily, 9am-5pm	2,912	245,223	0
12	Sutton	HWY	GF	Closed	-	-	0
					Total FY24:	5,804,292	452

Notes:

GSA only volunteers at locations of their choosing serving their interests

Plans pending to close Sutton and open Lebanon March 2025

As of this report, Open centers are operational year-round (hours subject to change)

Outdated Reports in Statute

Report for consideration to discontinue

RSA

9-B

Report name

SMART growth report

Travel & Tourism Report

Please see supplemental document provided containing the requested report relative to the return on investment information discussed during the presentation.



New Hampshire

LIVE FREE

2023 Spring/Summer Advertising
Effectiveness Wave 2 ROI Research

September 2023



SMARInsights

Background & Objectives

- In spring/summer 2023, the New Hampshire Division of Travel and Tourism Development (DTTD) continued to run “Discover Your New” advertising in core, long drive, and Canadian markets.
- DTTD has partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct primary research among target consumers to assess the effectiveness of the 2023 spring/summer advertising. An initial ad awareness/creative evaluation research wave was completed in August 2023.
- This current research wave focuses on the impact of the advertising and the return on the media investment.
- The specific objectives of this ROI research include:
 - Reviewing the wave 1 results
 - Assessing the advertising influence on New Hampshire travel during spring/summer 2023
 - Exploring the results by market groups
 - Reviewing ad impact on the New Hampshire trip
 - Providing insights to guide marketing decision-making

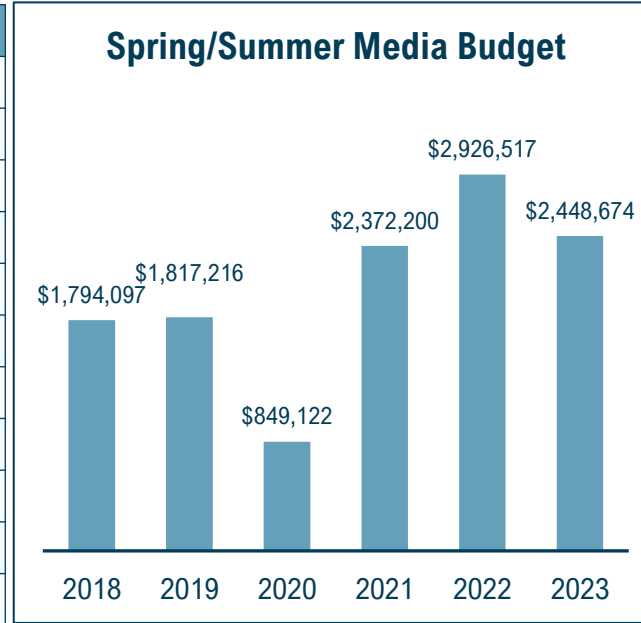
Methodology

- 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 are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents must be household travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents must also be between the ages of 18 and 65.
- The 2023 spring/summer advertising was aimed at existing northeastern core markets, more distant “long drive” markets, and Canadian markets.
- It is also important to note that the quantity of states comprising the long drive markets was reduced from 2022 and now includes only Pennsylvania and New Jersey. In 2022, the long drive group included those two markets plus Delaware, Maryland, Virginia, North Carolina, and Ohio. For the Canadian markets, Toronto was removed and replaced with Quebec City. Ad spending by market is provided on the following page.
- A total of 2,302 ROI surveys were completed in September 2023. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the ad effectiveness research results.

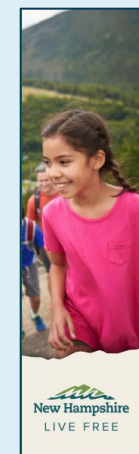
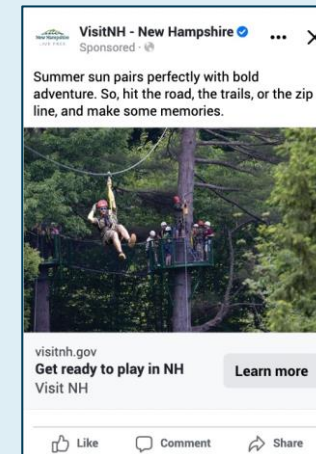
Market		Completed Surveys
Core	MA	300
	RI	99
	CT	200
	ME	100
	NH	100
	NY	600
Long Drive	NJ	300
	PA	400
Canadian	Quebec City	99
	Montreal	104
Total		2,302

Campaign Overview

Market	Print	TV/Pre-Roll	OOH	Display	Social	TOTAL
MA	\$7,152.83	\$54,368.00	\$144,488.00	\$61,705.00	\$30,291.67	\$298,005.50
RI	\$7,152.83	\$85,156.00	\$18,750.00	\$71,861.67	\$16,666.67	\$199,587.17
CT	\$7,152.83	\$78,710.00	\$19,700.00	\$71,861.67	\$16,666.67	\$194,091.17
ME	\$7,152.83	\$20,970.00	-	\$61,705.00	\$30,291.67	\$120,119.50
NH	\$7,152.83	\$57,673.00	\$16,440.00	\$61,705.00	\$30,291.67	\$173,262.50
NY	\$7,152.83	\$68,701.00	\$327,921.00	\$71,861.67	\$16,666.67	\$492,303.17
NJ	-	-	\$172,855.00	\$86,300.00	\$44,000.00	\$303,155.00
PA	-	\$70,523.00	\$214,414.00	\$86,300.00	\$44,000.00	\$415,237.00
Montreal	-	-	\$52,532.00	\$63,350.00	\$27,500.00	\$143,382.00
Quebec City	-	-	\$18,681.00	\$63,350.00	\$27,500.00	\$109,531.00
TOTAL	\$42,916.98	\$436,101.00	\$985,781.00	\$700,000.01	\$283,875.02	\$2,448,674.01



- The 2023 spring/summer campaign included print, TV/pre-roll, out of home, digital display, and social media advertising. The entire collection of ads tested can be found in the questionnaire in the Appendix.
- The ads invite viewers to “Discover Your New” and feature New Hampshire’s outdoor, small town, road trip, and family-friendly activities and attractions.
- The campaign investment was smaller than in 2022 but larger than the 2021 investment.



Samples of Creative



Insights

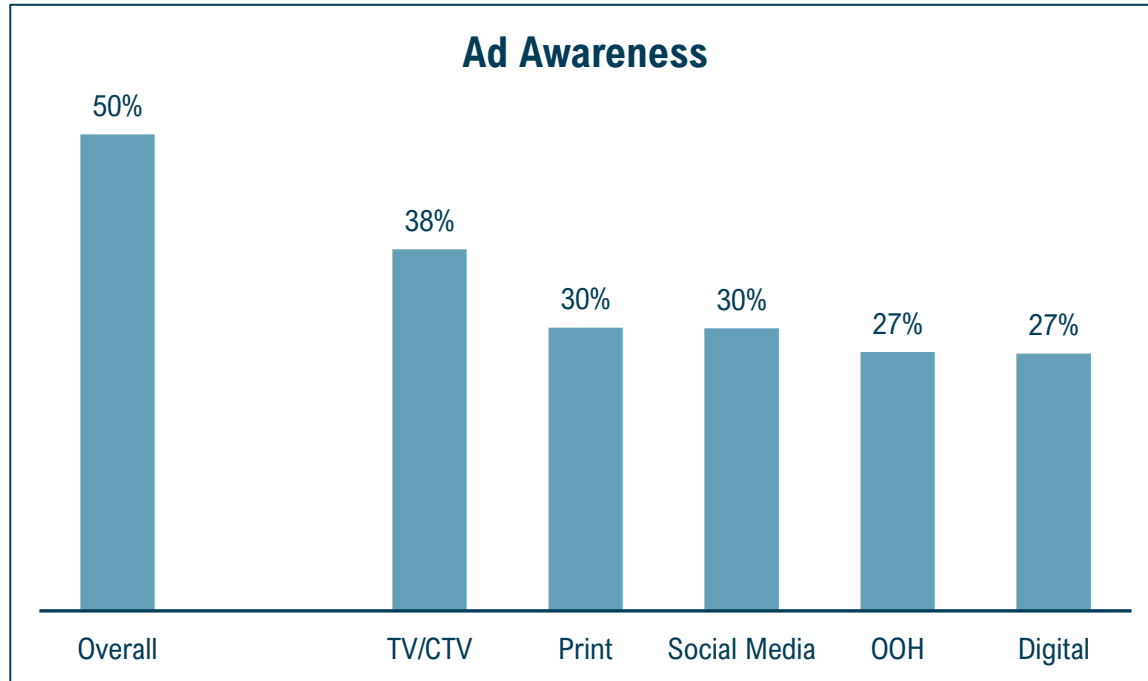
Compared to the 2022 spring/summer campaign, the 2023 spring/summer campaign was aimed at fewer markets with a smaller media budget. The “core” markets were unchanged, but several “long drive” markets that were targeted in 2022 were not targeted in 2023. Delaware, Maryland, Virginia, North Carolina, and Ohio were removed. New Jersey and Pennsylvania remained. And in Canada, Quebec City replaced the larger Toronto market. Montreal was targeted in both years. The result of this more focused marketing strategy in which the established/nearby “core” markets represent a larger proportion of target households is:

- The level of ad awareness increased from 46% to 50%, but the quantity of ad-aware households declined from 12.8 million to 8.7 million. The cost per ad-aware household rose from \$0.23 to \$0.28, but still beats the industry norm of \$0.51.
- Media overlap (awareness of ads in multiple media) increased. Media overlap consistently has a positive correlation with advertising influence.
- The overall level of incremental (ad-influenced) travel increased, driven by strong ad influence in the core markets. But there was no incremental travel from the 2023 long drive markets of New Jersey and Pennsylvania. An extremely competitive environment in which DMOs have big budgets and leisure travelers are free to roam the globe again made it difficult to influence travel from these more distant domestic markets. Incremental travel increased in Canada, but targeting fewer households resulted in a decline in the quantity of ad-influenced trips and less ad-influenced visitor spending.
- Ultimately, the 2023 spring/summer advertising influenced nearly 500,000 New Hampshire leisure trips and \$560 million in visitor spending. With a media investment of \$2.4 million, the ROI is \$228 for each \$1 invested in the media. ROI is down from \$266 in 2022 but is higher than in prior years.
- As in prior years, the advertising not only influenced New Hampshire leisure travel, but it also gave visitors ideas that led to longer, more active, better trips with higher average spending.

Wave 1 Review

SMARinsights

2023 Ad Awareness

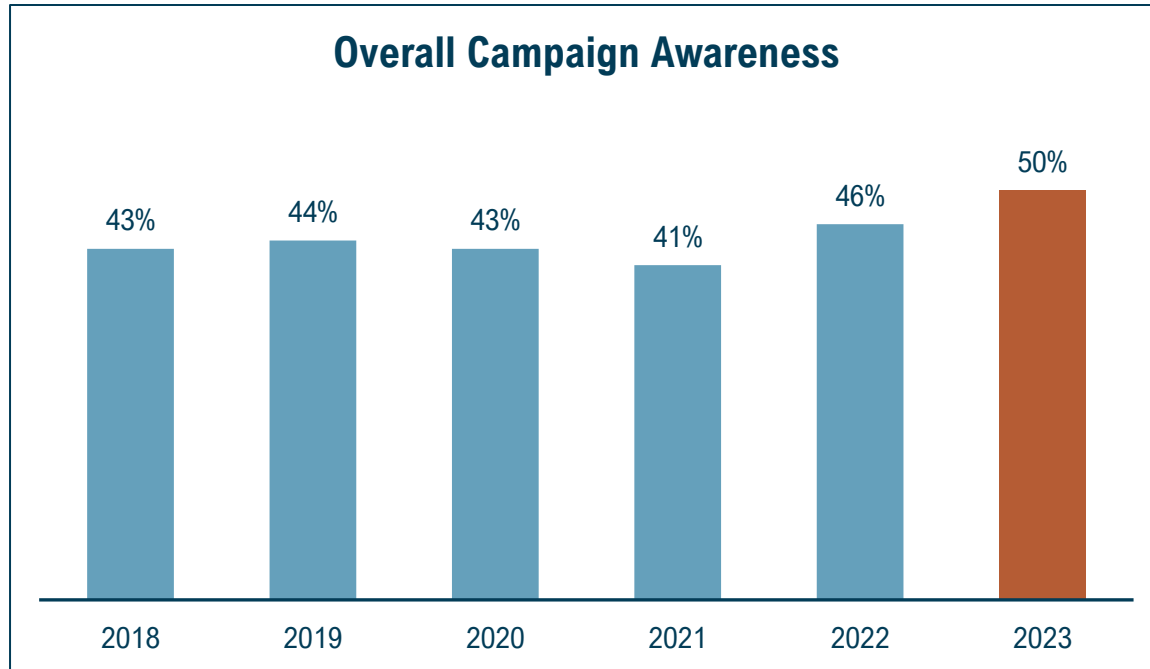


Target HHs	17,429,050
Ad Awareness	50%
Ad-Aware HHs	8,742,575
Media Investment	\$2,448,674
Cost per Aware HH	\$0.28



- The 2023 spring/summer campaign generated 50% awareness, reaching roughly 8.7 million households. A media investment of \$2.4 million translates to \$0.28 cost per ad-aware household, which is below the SMARInsights' average of \$0.51 for similar campaigns.
- The video creative contributed the most to the overall reach with 38% awareness, followed by print and social media.

Tracking Ad Awareness

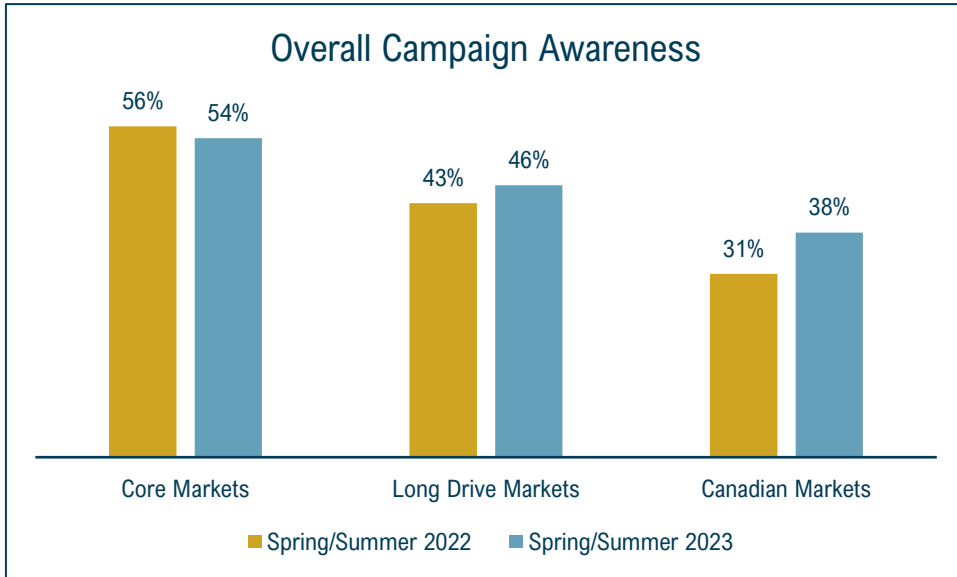


	2018	2019	2020	2021	2022	2023
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,050
Ad Awareness	43%	44%	43%	41%	46%	50%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926.52	\$2,448,674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

- The 2023 spring/summer campaign reached a greater percentage of targeted consumers (50%) as a result of more focused geographic targeting (a reduction of 10 million targeted households), although this strategy was less efficient overall as indicated by the \$0.28 cost per aware household (+\$0.05).

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

Ad Awareness by Market Group



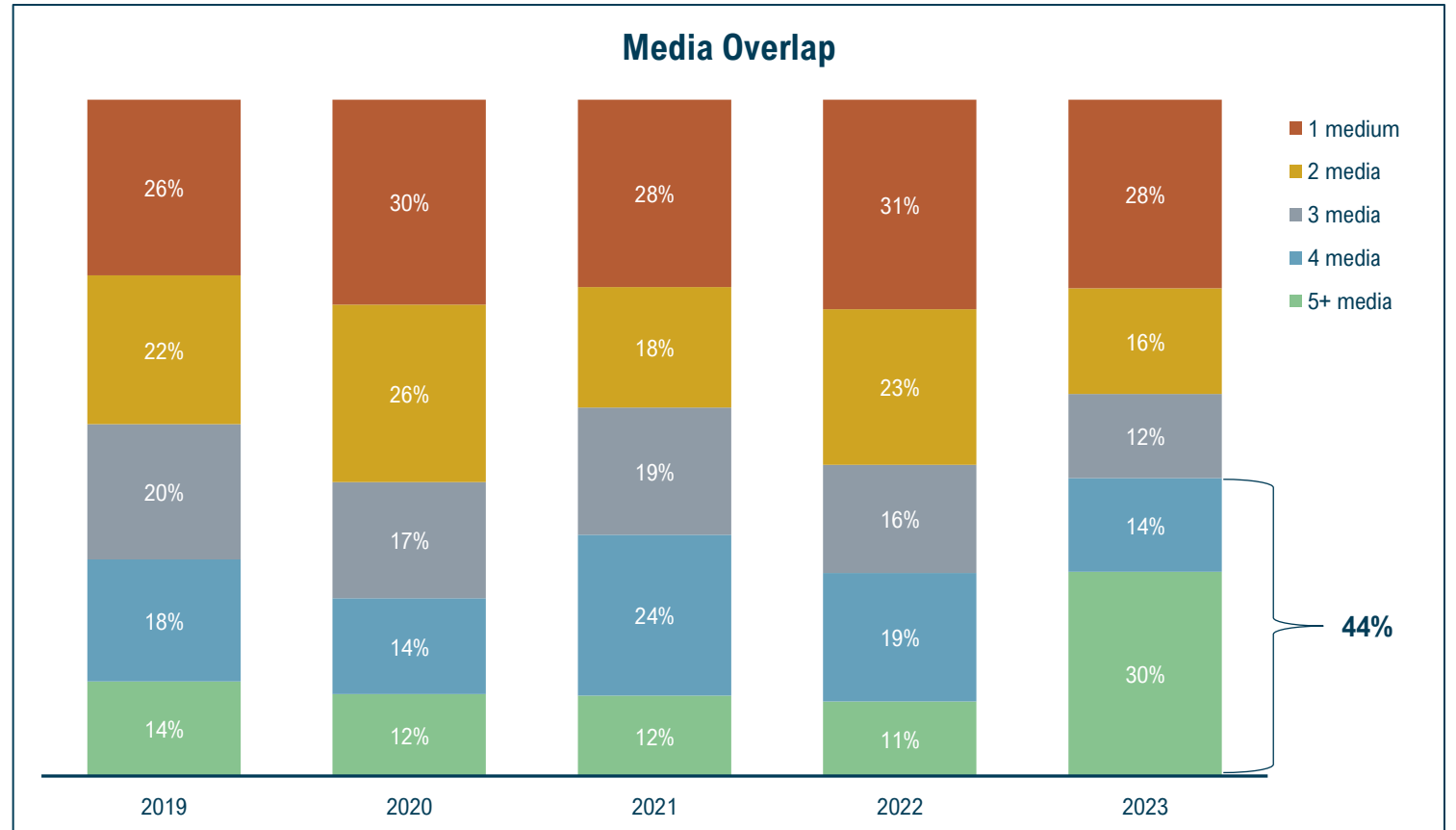
	Core Markets 2022	Core Markets 2023	Long Drive Markets 2022	Long Drive Markets 2023	Canadian Markets 2022	Canadian Markets 2023
Target HHs	9,286,327	*10,039,596	16,375,106	6,485,136	2,125,618	904,319
Awareness	56%	54%	43%	46%	31%	38%
Aware HHs	5,193,350	5,429,435	6,981,978	2,971,767	666,338	341,373
Media Investment	\$2,120,333	\$1,477,369	\$537,521	\$718,392	\$268,663	\$252,913
Cost per Aware HH	\$0.41	\$0.27	\$0.08	\$0.24	\$0.40	\$0.74

*The core markets did not change, but the leisure travel incidence increased, resulting in more target households.

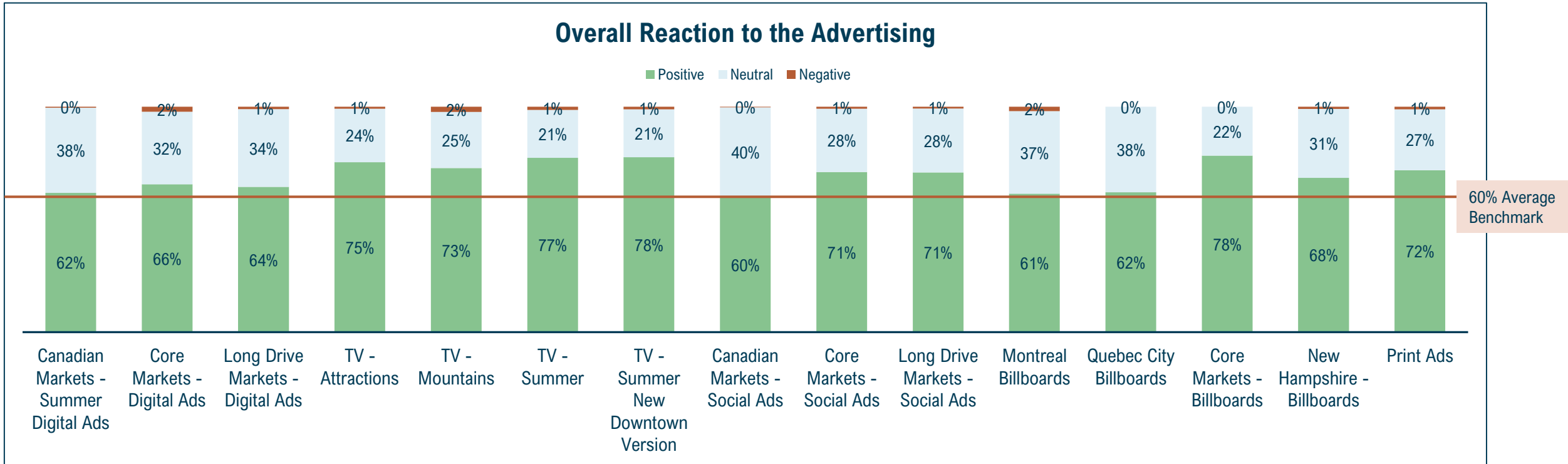
- A smaller investment in the core markets led to only a slight decline in ad awareness (56% to 54%). This led to a notable improvement in media efficiency (\$0.41 per ad-aware household to \$0.27).
- The long drive strategy of targeting fewer households with a larger investment led to modest growth in ad awareness (43% to 46%) but significantly fewer ad-aware households and a less efficient media buy.
- Similarly, targeting fewer Canadian households by swapping Quebec City for Toronto resulted in higher ad awareness but fewer ad-aware households and a decline in reach efficiency.

Media Overlap

- Of those aware of any 2023 ads, 44% were aware of 4 or more ad media – the highest in the past 5 years, even with the exclusion of radio (Pandora) advertising from the previous year.
- Again, this is likely a result of a more focused marketing strategy.
- Reaching consumers with multiple forms of advertising tends to correspond with strong incremental travel.



Overall Reaction

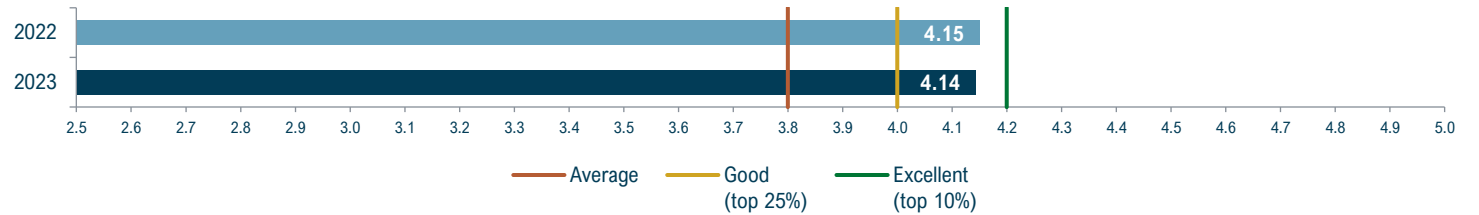


- Many of the ads received a proportion of positive reactions above the SMARInsights' benchmark of 60%. Consumers tend to be the most positive toward video, which is the case for this campaign. Additionally, the billboards used in the core markets received strong positive reactions.

Communication Attributes

- Many of the communication scores remain strong but unchanged.
- We generally expect increases in awareness to generate subsequently better performances in communication as aware consumers tend to give higher ratings.
- Even with a geographically focused strategy and improved awareness levels, the communication ratings have remained steady. This could suggest that the campaign is beginning to wear out.
- On a more positive note, we do see a slightly positive increase for “where I would feel free-spirited.”

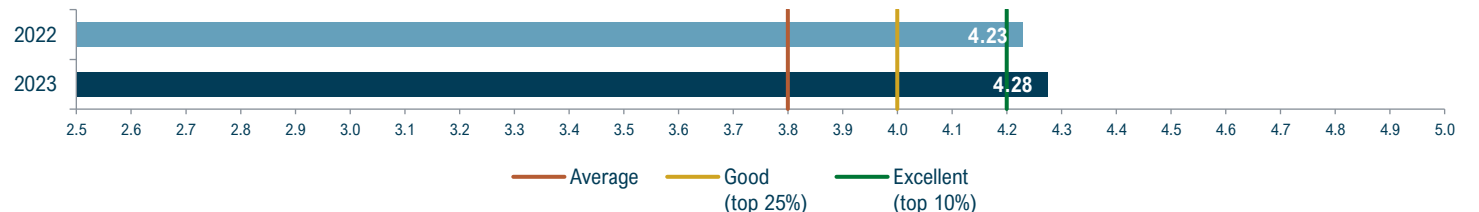
Where I would be inspired and invigorated



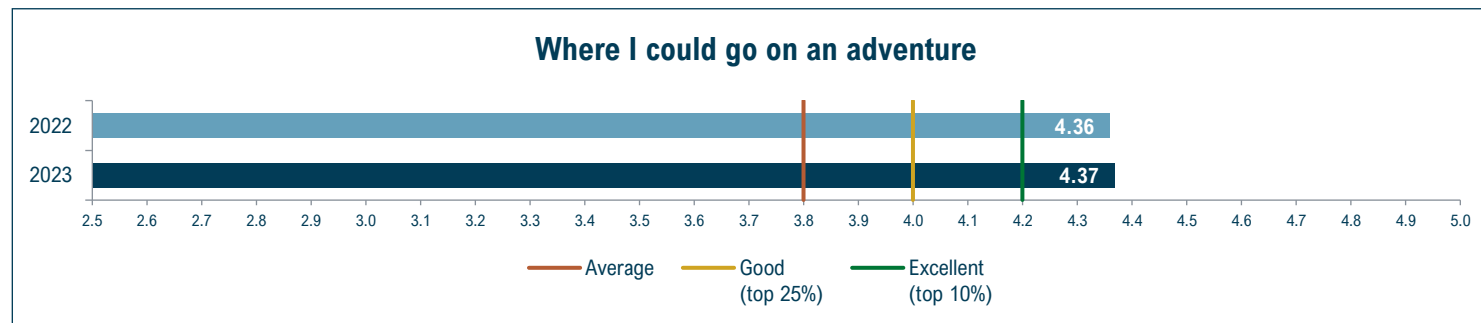
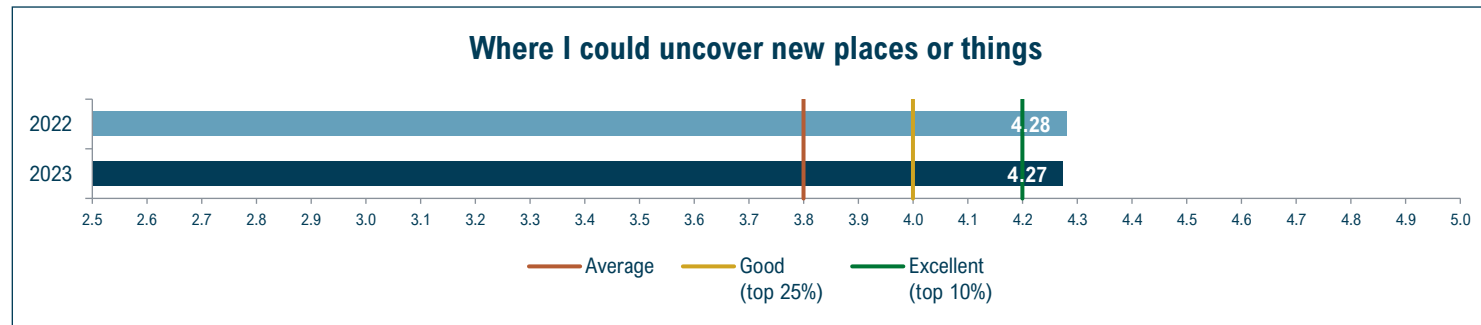
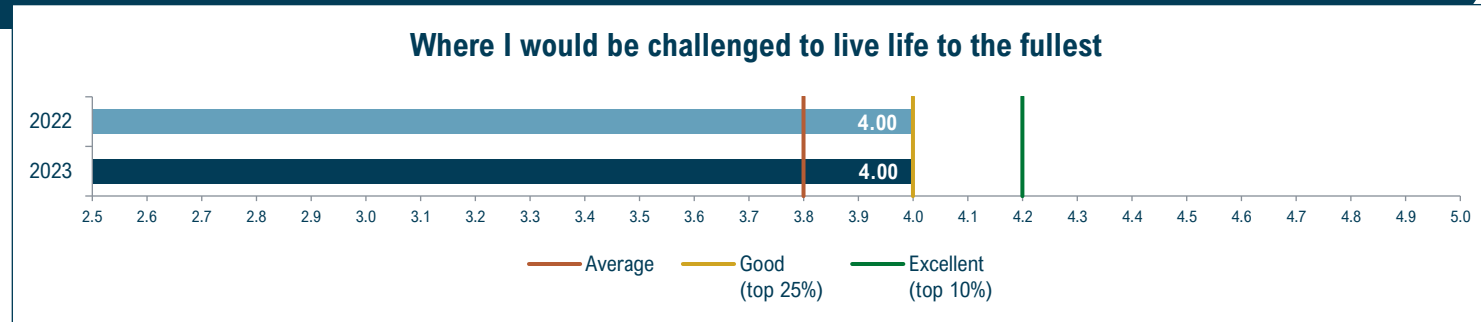
Where I could reconnect with my family



Where I would feel free-spirited

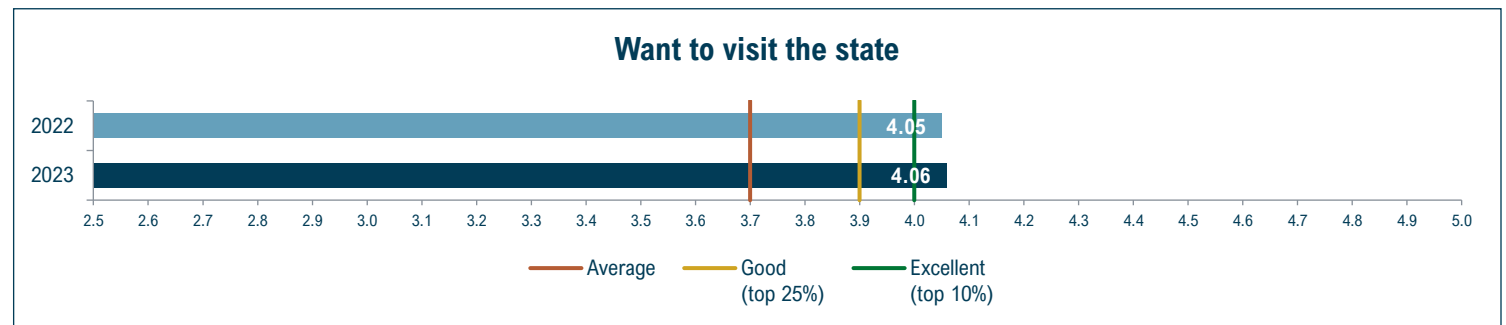
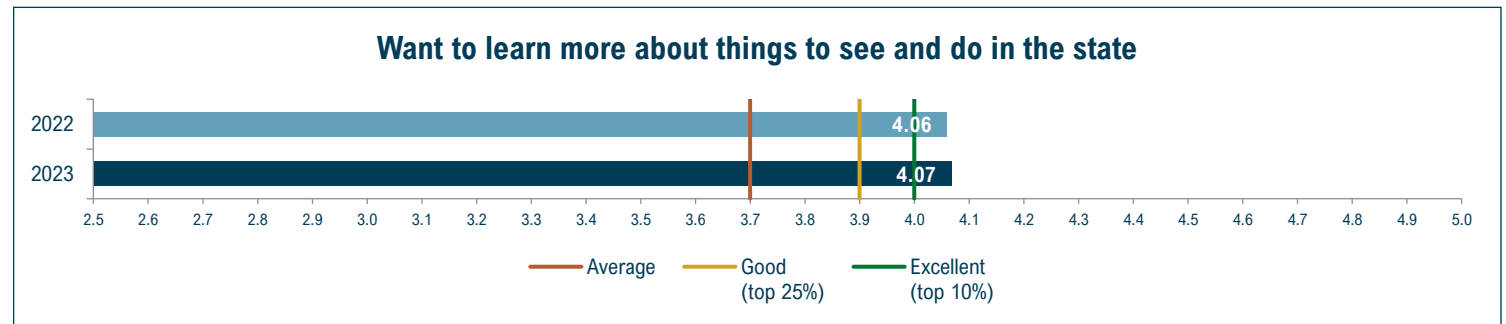


Communication Attributes, cont.



Impact Attributes

- The campaign continues to be in the top 10% of all campaigns at both encouraging consumers to learn more and want to visit New Hampshire.
- Given this campaign's stable and strong impact ratings and improved ad reach, we expected that the ads would again ultimately New Hampshire leisure travel.



Advertising Influence & ROI



SMARinsights

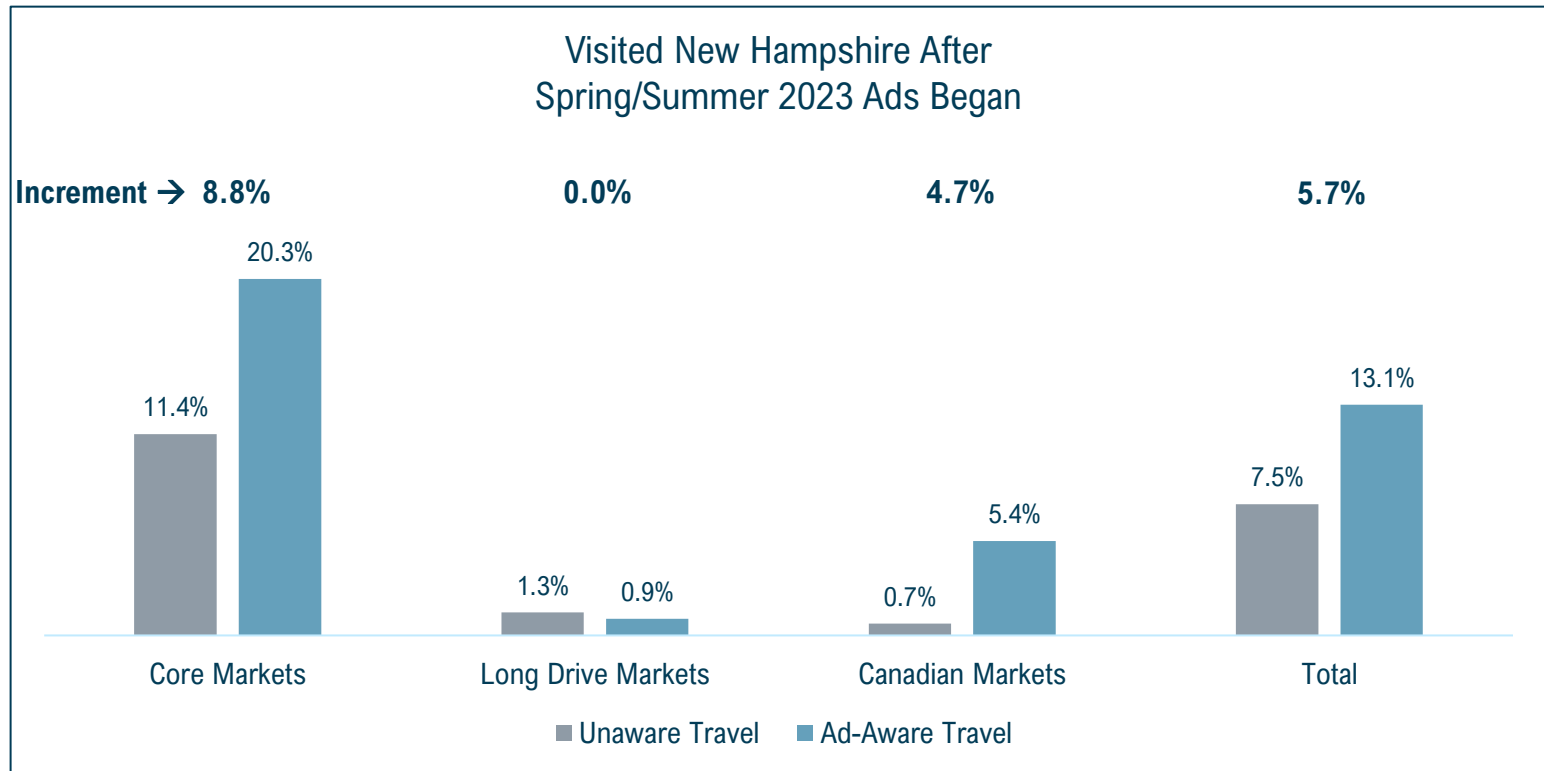
Incremental Travel Review

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

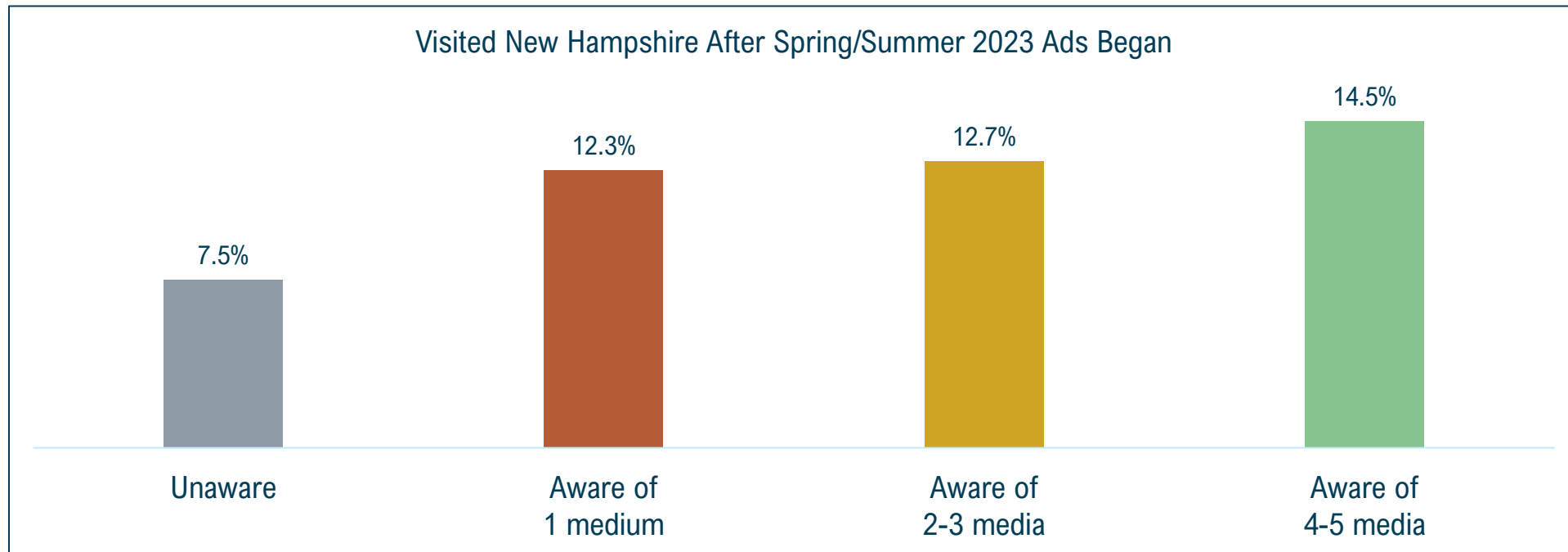


2023 Spring/Summer Incremental Travel

- The 2023 spring/summer advertising influenced New Hampshire leisure travel from the core and Canadian markets.
- But there was no incremental travel from the 2023 long drive markets of New Jersey and Pennsylvania. An extremely competitive environment in which DMOs have big budgets and leisure travelers are free to roam the globe again made it difficult to influence travel from these more distant domestic markets.



2023 Spring/Summer Media Overlap Influence

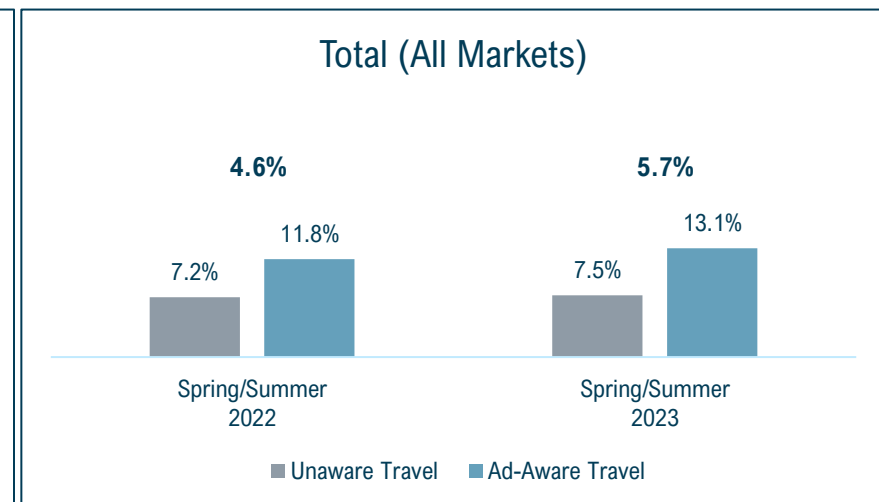
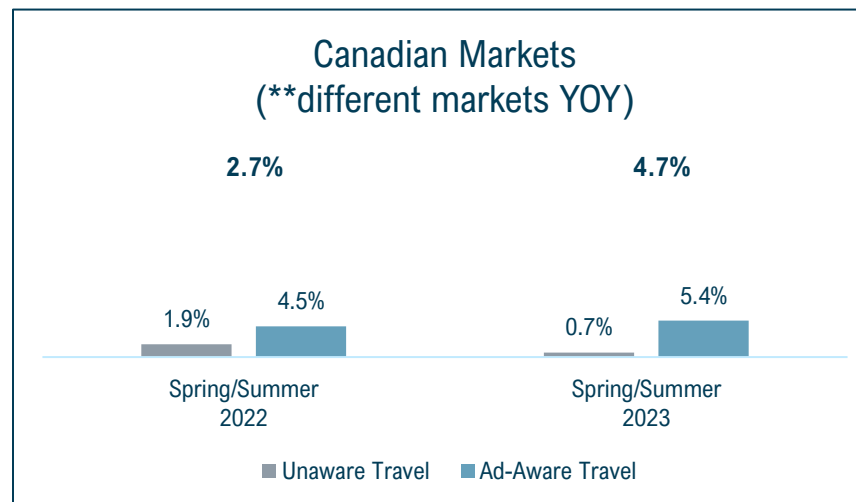
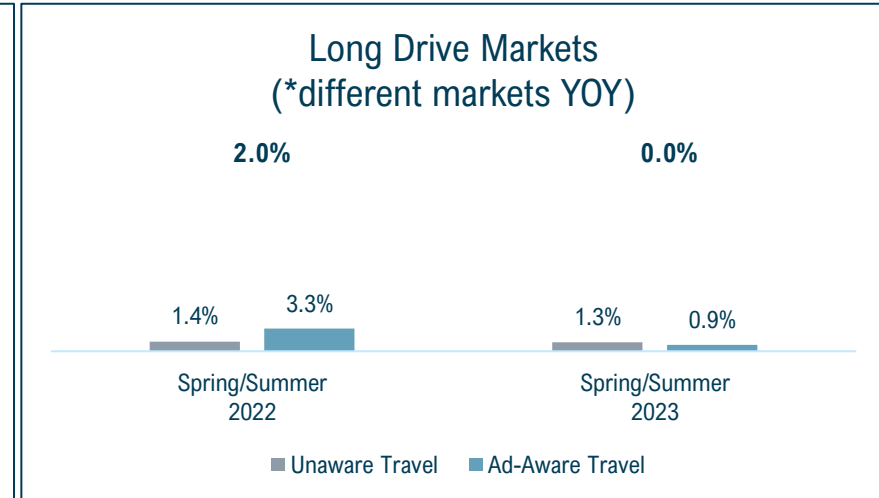
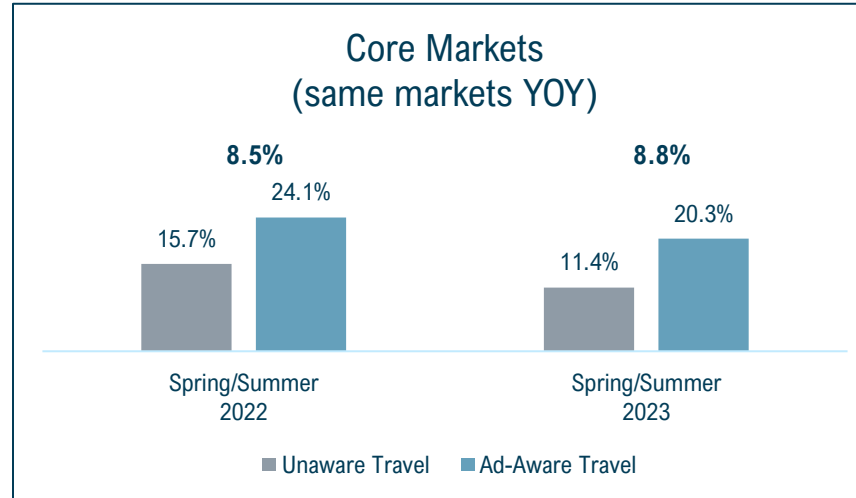


- The 2023 spring/summer campaign influenced New Hampshire leisure travel at all levels of media overlap, but the strongest influence occurred among consumers who saw 4 or 5 ad media. This reiterates the importance of running multi-media campaigns and implementing media plans that result in awareness overlap.

Incremental Travel Change by Market & Overall

*2022 Long Drive	*2023 Long Drive	**2022 Canadian	**2023 Canadian
NJ	NJ	Toronto	Quebec City
PA	PA	Montreal	Montreal
DE			
MD			
VA			
NC			
OH			

- The overall level of incremental travel increased year over year, driven by continued strong ad influence in the core markets.
- The long drive markets were fruitful last year, but even with a more focused long drive strategy this year in which fewer markets were targeted, there was no ad-influenced travel. Again, competitive pressures likely made it more challenging to influence travel from these distant domestic markets.
- Incremental travel increased in Canada, but targeting fewer households resulted in a decline in the quantity of ad-influenced trips and less ad-influenced visitor spending (shown later).



2023 Spring/Summer Ad-Influenced Trips

	Core Markets	Long Drive Markets	Canadian Markets	Total
Target HHs	10,039,596	6,485,136	904,319	17,429,051
Ad Awareness	54%	46%	38%	50%
Ad-Aware HHs	5,429,435	2,971,767	341,373	8,742,575
Incremental Travel	8.8%	0.0%	4.7%	5.7%
Incremental Trips	478,496	0	15,966	494,462

- The 2023 spring/summer advertising influenced about 494,000 New Hampshire leisure trips, most coming from the core target markets.
- The ads influenced travel from Montreal and Quebec City, but these comparatively small markets produce only a small portion of ad-influenced trips.

2023 Spring Summer Ad-Influenced Visitor Spending & ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	478,496	0	15,966	494,462
Avg. Trip Spending (among ad-aware visitors)	\$1,133	--	\$1,046	\$1,130
Ad-Influenced Trip Spending	\$541,983,518	\$0	\$16,697,329	\$558,680,848
Media Investment	\$1,477,369	\$718,392	\$252,913	\$2,448,674
ROI	\$367	\$0	\$66	\$228

- The 2023 spring/summer advertising influenced about \$559 million in visitor spending and returned \$228 in visitor spending for each \$1 invested in the advertising media.
- The return is higher in the core markets than in the Canadian markets.

Spring/Summer 2023 Tax ROI

	Core Markets	Long Drive Markets	Canadian Markets	Total
Incremental Trips	478,496	0	15,966	494,462
Avg. Taxable Trip Spending (among ad-aware visitors)	\$832	--	\$1,225	\$844
Ad-Influenced Taxable Trip Spending	\$397,920,678	\$0	\$19,559,363	\$417,480,042
Taxes Generated	\$33,823,258	\$0	\$1,662,546	\$35,485,804
Media Investment	\$1,477,369	\$718,392	\$252,913	\$2,448,674
Tax ROI	\$22.89	\$0.00	\$6.57	\$14.49

- In terms of tax revenue, the 2023 spring/summer advertising returned \$14.49 for each \$1 invested in the advertising media.

Spring/Summer ROI Tracking

	Spring/Summer 2018	Spring/Summer 2019	Summer 2020	Spring/Summer 2021	Spring/Summer 2022	Spring/Summer 2023	% Change 2022 to 2023
Target HHs	14,496,273	16,275,450	12,147,318	25,765,229	27,787,051	17,429,051	-37%
Ad Awareness	43%	44%	43%	41%	46%	50%	9%
Ad-Aware HHs	6,189,099	7,239,490	5,203,708	10,510,535	12,841,666	8,742,575	-32%
Incremental Travel	6.5%	4.4%	3.1%	4.2%	4.6%	5.7%	24%
Incremental Trips	399,487	317,107	160,763	438,804	594,332	494,462	-17%
Avg. Trip Spending (among ad-aware visitors)	\$804	\$1,042	\$1,053	\$1,202	\$1,312	\$1,130	-14%
Ad-Influenced Trip Spending	\$321,101,120	\$330,339,600	\$169,243,990	\$527,237,760	\$779,563,175	\$558,680,848	-28%
Media Investment	\$1,794,097	\$1,817,216	\$849,122	\$2,372,200	\$2,926,517	\$2,448,674	-16%
ROI	\$179	\$182	\$199	\$222	\$266	\$228	-14%
Avg. Taxable Trip Spending (among ad-aware visitors)	\$598	\$680	\$603	\$778	\$882	\$844	-4%
Ad-Influenced Taxable Trip Spending	\$238,957,240	\$215,567,826	\$97,014,255	\$341,556,238	\$524,184,858	\$417,480,042	-20%
Taxes Generated	\$21,506,152	\$19,401,104	\$8,731,283	\$30,740,062	\$44,555,713	\$35,485,804	-20%
Tax ROI	\$11.99	\$10.68	\$10.28	\$12.96	\$15.22	\$14.49	-5%

- The more focused marketing strategy in 2023 resulted in higher levels of ad awareness and incremental travel, but the smaller and closer-by household base meant less ad-influenced trips, lower average visitor spending, lower ad-influenced visitor spending, and a lower ROI compared to last year. That said, the ROI is the second-highest of the past six spring/summer campaigns.

Spring/Summer ROI Change by Market

	Core Markets 2022	Core Markets 2023	Core Markets % Change	Long Drive Markets 2022	Long Drive Markets 2023	Long Drive Markets % Change	Canadian Markets 2022	Canadian Markets 2023	Canadian Markets % Change
Target HHs	9,286,327	10,039,596	8%	16,375,106	6,485,136	-60%	2,125,618	904,319	-57%
Ad Awareness	56%	54%	-4%	43%	46%	7%	31%	38%	23%
Ad-Aware HHs	5,193,350	5,429,435	5%	6,981,978	2,971,767	-57%	666,338	341,373	-49%
Incremental Travel	8.5%	8.8%	4%	2.0%	0.0%		2.7%	4.7%	74%
Incremental Trips	439,068	478,496	9%	137,315	0		17,948	15,966	-11%
Avg. Trip Spending (among ad-aware visitors)	\$1,085	\$1,133	4%	\$1,880	--		\$2,517	\$1,046	-58%
Ad-Influenced Trip Spending	\$476,277,847	\$541,983,518	14%	\$258,109,201	\$0		\$45,176,126	\$16,697,329	-63%
Media Investment	\$2,120,333	\$1,477,369	-30%	\$537,521	\$718,392	34%	\$268,663	\$252,913	-6%
ROI	\$225	\$367	63%	\$480	\$0		\$168	\$66	-61%

- The 2023 spring/summer core market advertising influenced more trips with a smaller budget. The advertising continues to build upon a strong foundation in these nearby markets.
- The more focused long-drive strategy of targeting fewer markets with more money led to slightly higher ad awareness, but it did not pay off in terms of influenced trips and ROI.
- Replacing Toronto with Quebec City led to higher ad awareness and stronger incremental travel in Canada, but ad-influenced visitor spending and ROI declined.

Total Fiscal Year ROI



SMARinsights

Total FY2022/2023 ROI

- Accounting for all FY2022/23 campaigns, the advertising influenced \$827 million in visitor spending, \$51 million in tax revenue, and visitor spending and tax ROIs of \$268 and \$17, respectively.

	Fall 2022	Winter 2022/2023	Spring/Summer 2023	Total FY 2022/2023
Ad-Influenced Trips	105,635	96,073	494,462	696,170
Avg. Trip Spending (among ad-aware visitors)	\$1,181	\$1,492	\$1,130	\$1,188
Ad-Influenced Trip Spending	\$124,806,730	\$143,382,835	\$558,680,848	\$826,870,413
Avg. Taxable Trip Spending (among ad-aware visitors)	\$827	\$1,023	\$844	\$866
Ad-Influenced Taxable Trip Spending	\$87,401,514	\$98,327,450	\$417,480,042	\$603,209,006
Taxes Generated	\$7,429,129	\$8,849,470	\$35,485,804	\$51,272,765
Media Investment	\$226,338	\$406,766	\$2,448,674	\$3,081,778
ROI	\$551	\$352	\$228	\$268
Tax ROI	\$33	\$22	\$14	\$17

Total FY ROI Comparison

- Total FY2022/2023 ROI is on par with FY2021/2022.
- The results in terms of ROI are the strongest of the past several years except for FY2019/2020, when a small budget took advantage of the outdoor/nearby travel behaviors resulting from the pandemic.

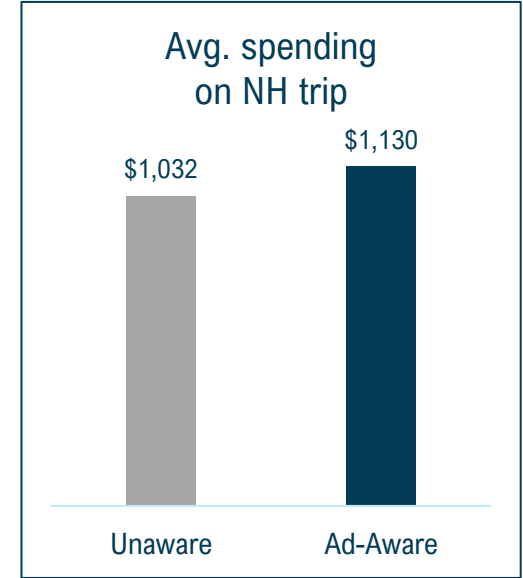
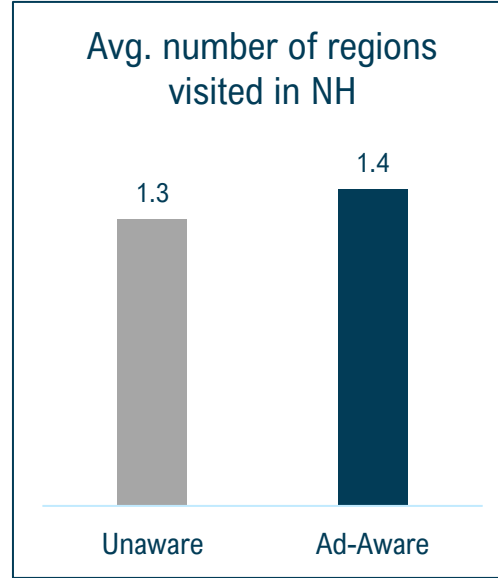
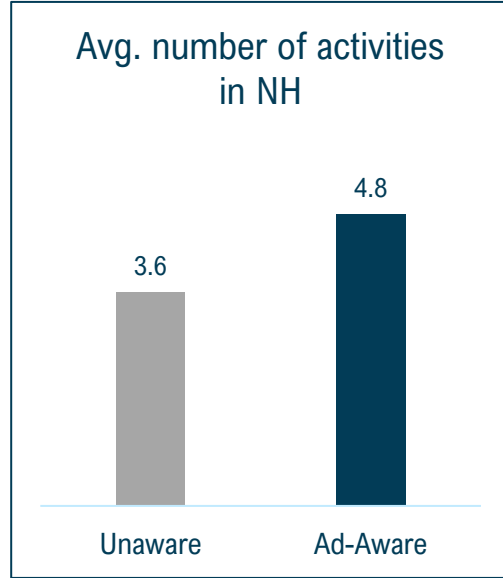
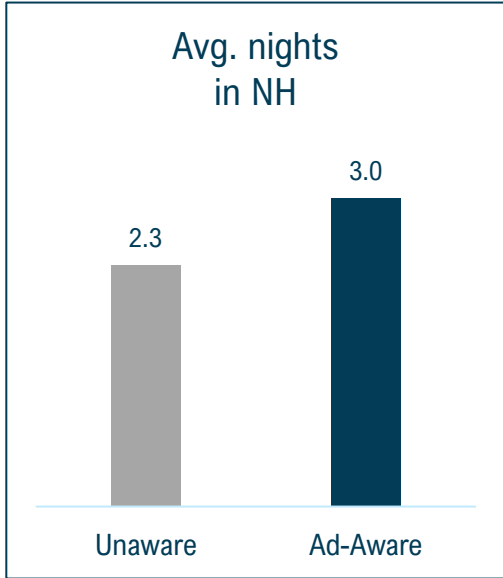
	Total Fiscal Year 2017/2018	Total Fiscal Year 2018/2019	Total Fiscal Year 2019/2020	Total Fiscal Year 2020/2021	Total Fiscal Year 2021/2022	Total Fiscal Year 2022/2023
Influenced Trips	604,055	636,170	555,681	529,505	743,727	696,170
Avg. Trip Spending (among ad-aware visitors)	\$839	\$900	\$1,103	\$1,101	\$1,288	\$1,188
Influenced Trip Spending	\$506,679,581	\$572,280,741	\$613,102,160	\$583,077,833	\$958,161,359	\$826,870,413
Avg. Taxable Trip Spending (among ad-aware visitors)	\$586	\$583	\$736	\$751	\$871	\$866
Influenced Taxable Trip Spending	\$353,937,438	\$370,684,548	\$408,746,075	\$397,603,983	\$647,472,232	\$603,209,006
Taxes Generated	\$31,854,370	\$33,361,609	\$36,787,146	\$35,784,358	\$55,035,140	\$51,272,765
Media Spending	\$2,481,988	\$2,567,179	\$1,545,410	\$2,962,296	\$3,450,473	\$3,081,778
ROI	\$204	\$223	\$397	\$197	\$278	\$268
Tax ROI	\$13	\$13	\$24	\$12	\$16	\$17

Ad Influence on the New Hampshire Trip



SMARinsights

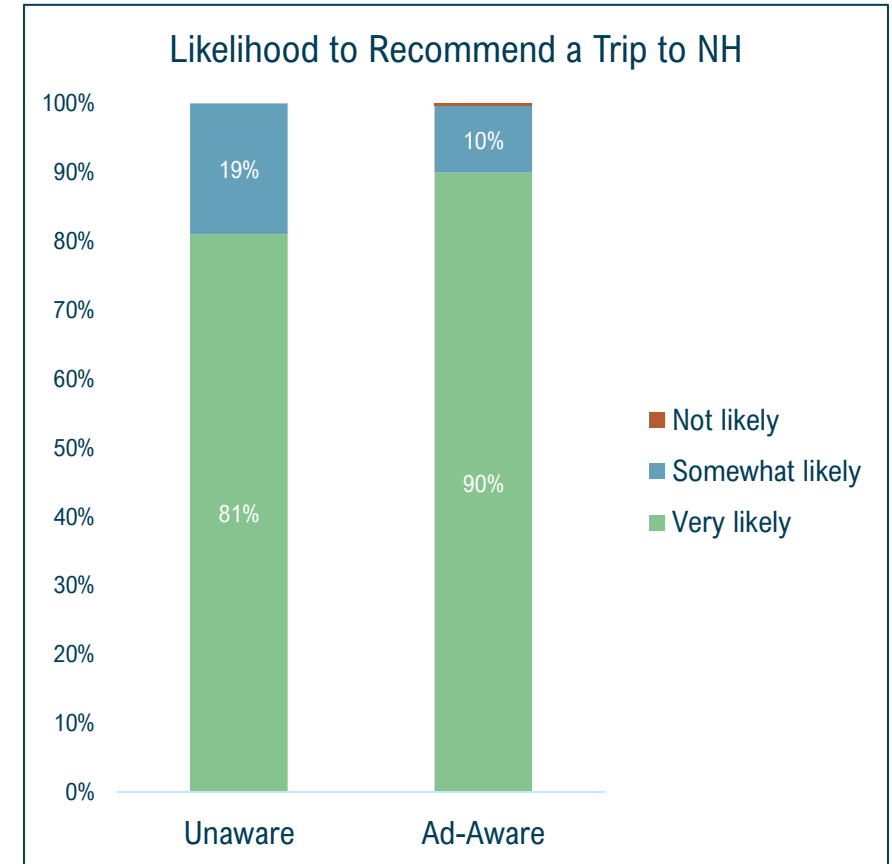
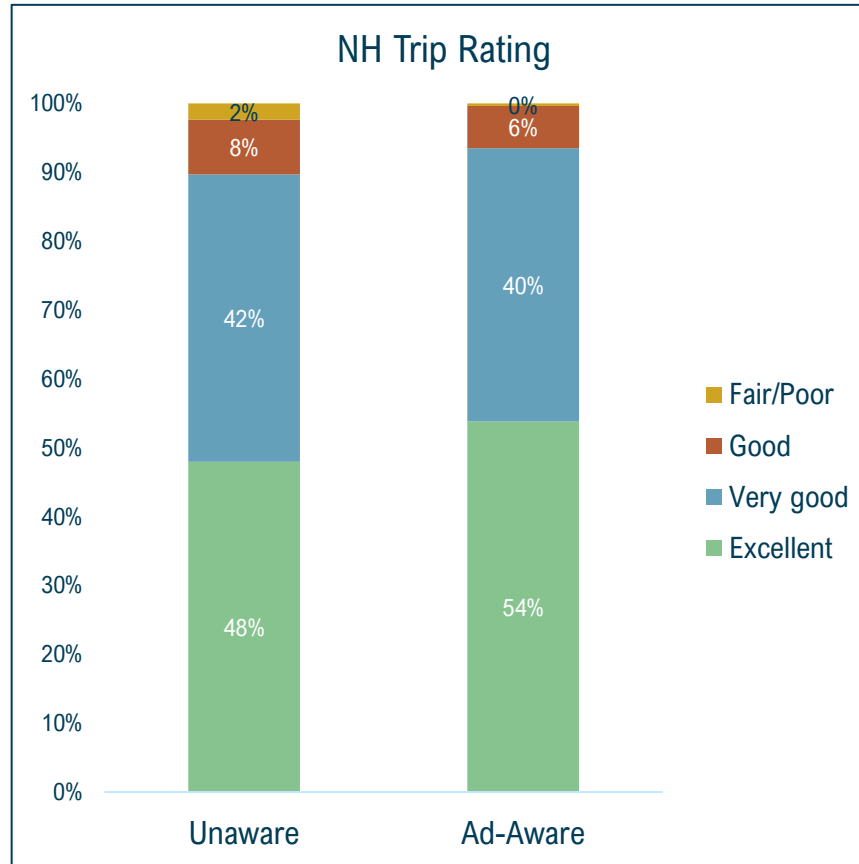
Ad Influence on the New Hampshire Trip



- As in prior years, the advertising not only influenced New Hampshire leisure travel, but it also gave visitors ideas that led to longer, more active trips with higher average spending.

Ad Influence on the New Hampshire Trip

- Ad-aware visitors are also more likely than unaware visitors to rate their New Hampshire trip “excellent” and to recommend the state as place for a leisure trip.



Appendix: Questionnaire



SMARInsights

Questionnaire

New Hampshire Tourism
2023 Spring/Summer Ad Effectiveness Wave 2
August 2023

SCREENER MODULE

- S1. What is your postal/ZIP code? _____
- S3. Who in your household is responsible for making decisions concerning travel destinations?
1. Me
 2. Me and my spouse/partner
 3. My spouse/partner → TERMINATE

S2. Please indicate which of the following describe you.

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

TERMINATE IF TRIP AND PLAN BOTH = 0

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

S5. Which of the following social networking sites do you use?

Select all that apply.

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

1

PERCEPTIONS MODULE

P2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

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

P3. How likely are you to take a leisure trip to any of the following states in the next year?

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

TRAVEL MODULE

T1. Have you traveled to or within any of the following states for a leisure trip in 2023? How many trips did you take to or within each state in 2023?

[ROTATE]	States visited in 2023	Number of visits in 2023
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

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

2

T2. When in 2023 did you travel to or within New Hampshire?

January	
February	
March	
April	
May	
June	
July	
August	
September	

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

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

ASK T4 IF T3 > 1

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

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

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

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

ASK T6 IF T5 > 0

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

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

3

Questionnaire

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

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

SHOW THE ACTIVITIES SELECTED IN T7 AND ASK:

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

SHOW NEW HAMPSHIRE REGIONS MAP AND ASK T9.

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

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

- Excellent
- Very good
- Good
- Fair
- Poor

4

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

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

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

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

- Very likely
- Somewhat likely
- Not likely

T13 AND T14 ARE TO ADDRESS AGRITOURISM.

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

ROTATE, ANCHOR "NONE"	
Retreat and rendezvous centers	
Nature centers	
Farm tours	
Farm-based lodging	
Cross-country ski or snowshoe trails	
Country overnight bed and breakfast	
Bird or big game hunting preserves	
Bird and wildlife watching	
Corn mazes or haunted forests	
Petting farms	
Hands-on U-pick	
Winery/vineyard	
Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides	
Farmers markets	
Rural wedding	
None of these	

T14. Please estimate how much your travel party spent in total on the following activities/attractions...

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

5

AD AWARENESS MODULE

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

DIGITAL:

MONTREAL AND QUEBEC CITY ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Display Ads\Canada_Greater Montreal, Quebec City

- VisitSummerFY23_Canada Adventure French_160x600
- VisitSummerFY23_Canada Family French_300x250
- VisitSummerFY23_Canada Relaxing French_300x600
- VisitSummerFY23_Retargeting French_300x250

MA, RI, CT, ME, NH AND NJ ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Display Ads\Core_MA_RI_CT_ME_NH_NY State

- VisitSummerFY23_Core Adventure_300x250
- VisitSummerFY23_Core Family_160x600
- VisitSummerFY23_Core Relaxing_300x250
- VisitSummerFY23_Retargeting All Markets_300x250

EASTERN PA AND NJ ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Display Ads\Long-Drive_Eastern PA, NJ

- VisitSummerFY23_Retargeting All Markets_300x250
- VisitSummerFY23_Road Trip Adventure_300x250
- VisitSummerFY23_Road Trip Family_300x600
- VisitSummerFY23_Road Trip Relaxing_300x250

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

6


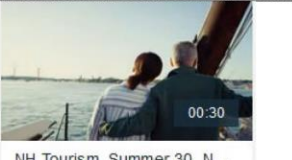
Questionnaire

TV

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\TV_Pre-Roll Videos\Pre-Roll Display Videos 15s_All Markets copy

<p>NH TOURISM 15 - ATTRACTIONS.mp4</p>  <p>NH TOURISM 15 - ATTRACTIONS</p> <p>https://vimeo.com/833440296?share=copy</p>	<p>NH TOURISM 15 - MOUNTAINS (SR).mp4</p>  <p>NH TOURISM 15 - MOUNTAINS (SR)</p> <p>https://vimeo.com/833441421?share=copy</p>
--	--

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\TV_Pre-Roll Videos\TV Spot 30_All Markets copy

<p>NH TOURISM SUMMER 30_original.mp4</p>  <p>NH TOURISM SUMMER 30_original</p> <p>https://vimeo.com/833442803?share=copy</p>	<p>NH Tourism_Summer 30_NEW Downtown Version.mov</p>  <p>NH Tourism_Summer 30_N...</p> <p>https://vimeo.com/833645160?share=copy</p>
--	--

SummerTV. Have you seen this or a similar ad for New Hampshire?
 Yes
 No

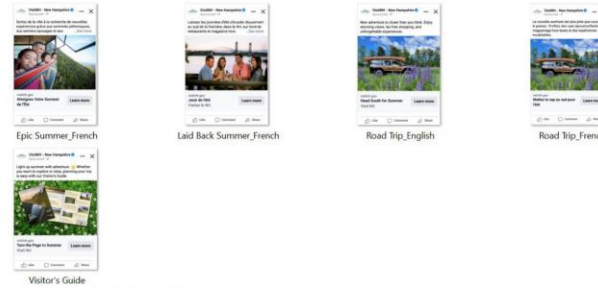
7

SOCIAL ADS:

ASK IF 55 > 0

MONTREAL AND QUEBEC CITY ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Social Ads\Canada_Greater Montreal, Quebec City



Visitor's Guide

MA, RI, CT, ME, NH AND NY ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Social Ads\Core_MA_RI_CT_ME_NH_NY State



8

EASTERN PA AND NJ ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Social Ads\Long-Drive_Eastern PA, NJ



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

OOH:

MONTREAL ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Billboards\Canada\Montreal\Use



QUEBEC CITY ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Billboards\Canada\Quebec City\Use



9

Questionnaire

MA, NJ, CT, NY, PA and RI ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Billboards\MA, NJ, CT, NY, PA, RI\Use



NEW HAMPSHIRE ONLY

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Billboards\New Hampshire\Use



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

- Yes
- No

PRINT:

I:\Ads Master\New Hampshire\2023\Summer 2023\Summer 2023 SMARI Assets\Print Ad_New England



Spread Ad_Mt
Washington
Jeep.jpg

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

- Yes
- No

DEMO MODULE

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

- D1. Are you currently ...?
 Married/living as married
 Divorced/Separated
 Widowed
 Single/Never married
- D2. Including you, how many people are currently living in your household? _____ [IF 1, SKIP TO D4]
- D3. How many living in your household are children under the age of 18? _____
- D4. Which of the following categories represents the last grade of school you completed?
 High school or less
 Some college/technical school
 College graduate
 Post-graduate degree
- D5. Which of the following categories best represents your total annual household income before taxes?
 Less than \$35,000
 \$35,000 but less than \$50,000
 \$50,000 but less than \$75,000
 \$75,000 but less than \$100,000
 \$100,000 but less than \$150,000
 \$150,000 but less than \$200,000
 \$200,000 or more
- D6. Which of the following best describes your ethnic heritage? Are you...? (ALLOW MULTI)
 - Caucasian/White
 - African American/Black
 - Asian
 - American Indian
 - Native Hawaiian or Other Pacific Islander
 - Other (Specify _____)
- D7a. Do you identify as Hispanic or Latino?
 Yes
 No
- D7. What is your preferred gender identity ...?
 Male
 Female
 Other
 Prefer not to answer