

# 2014 Visitor Profile



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April 2015

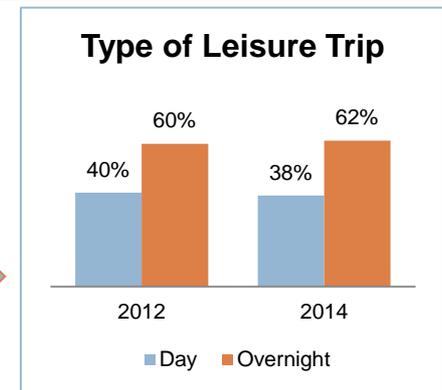
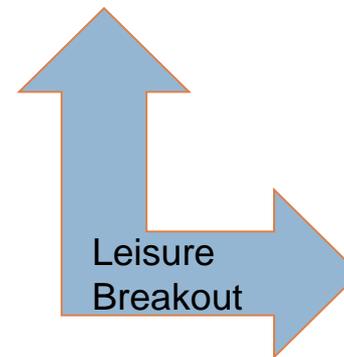
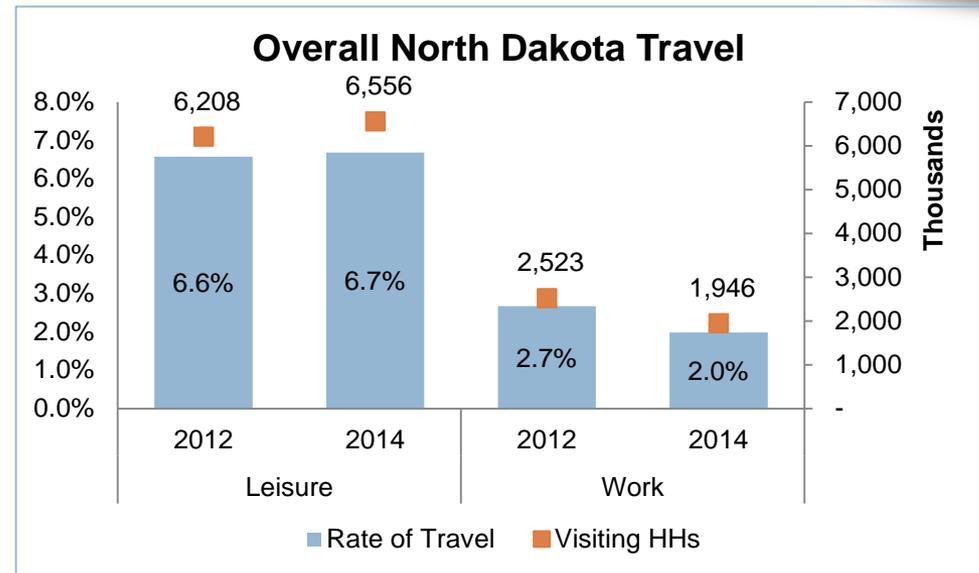
# Background & Methodology

The 2014 Visitor Profile research focused on overnight visitors to North Dakota.

- The goals of the research were to:
  - Track information on visitors and trips to North Dakota, including mode of travel, accommodations, attractions and sites visited, duration of travel, and expenditures;
  - Explore where visitors come from, where they go in the state, and what they do while visiting;
  - Understand how North Dakota visitors segment on outdoor activities;
  - Identify trips to North Dakota for work and track how those have changed; and
  - Provide information that will assist in marketing efforts.
- An online survey was conducted among a national audience to determine incidence of travel and to gather information on visitors and their trips. The focus was on both leisure and work trips and included both day and overnight visits. For 2014, a total of 7,544 surveys were conducted. There were 504 households that reported travel to North Dakota, with some reporting multiple trips. Overall, data were gathered on 1,008 North Dakota travelers.
- Surveying was conducted in February and March 2015 to gather information on trips throughout the previous two years.

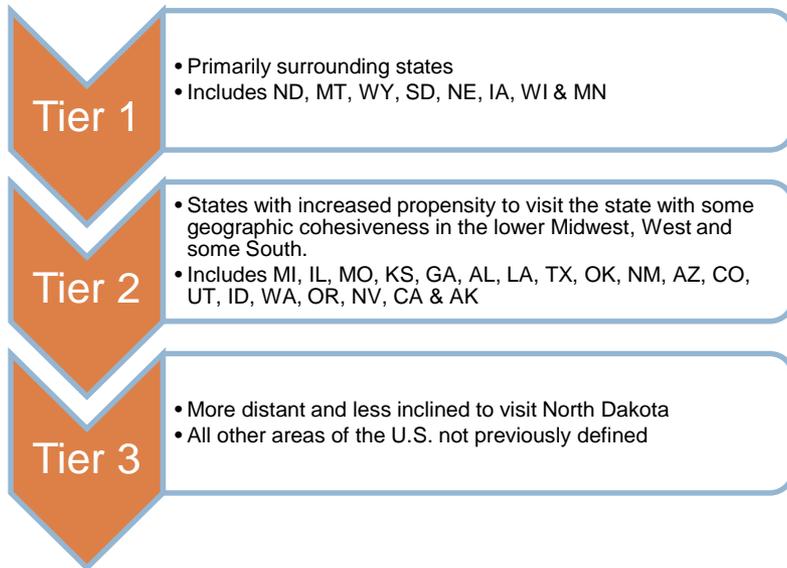
# Travel to North Dakota

- The overall rate of leisure travel increased slightly, while business travel was down.
- Of those visiting for leisure, more households were making overnight trips.
- Primary visitor origin states include:
  - North Dakota
  - South Dakota
  - Minnesota
  - Montana
  - Wisconsin
  - Colorado
  - Idaho



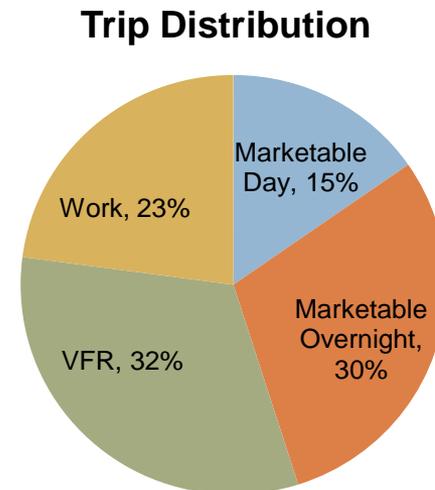
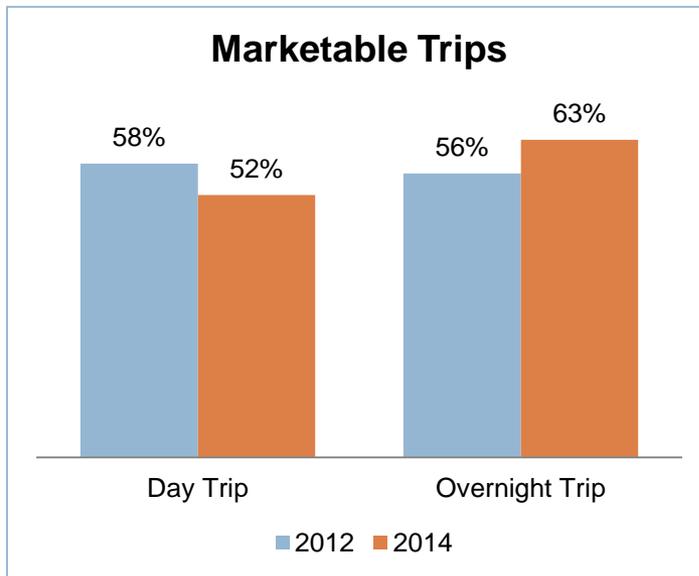
# Visitor Geography

- While there were increases in visitation from some individual states, including Colorado and Idaho, the same classification used previously by SMARInsights remains valid for comparison purposes.
- Nearby states, mostly those contiguous to North Dakota, are considered Tier 1, which saw a slight decline in visitation. At the same time, Tier 3, the most distant markets, had an increase in travel to the state.
- As the economy improves around the country, consumers are willing to travel farther for their leisure trips. Nearby markets chose more distant alternatives while North Dakota came into the consideration set for consumers from farther away.



# Visiting Friends and Relatives

- Overnight trips to North Dakota were more purposeful in that the state was the ultimate destination, and fewer of these trips were to visit friends and relatives.
- With fewer VFR trips, more of the overnight trips are considered “marketable” – that is, they are able to be influenced by North Dakota Tourism marketing.
- Of all North Dakota trips, one-third are VFR; another one in five trips are work-related trips, leaving just under half as marketable day trips or overnights.



# Trip Specifics for ND Visitors

- Trips to North Dakota in 2013 and 2014 were more purposeful in that the state was more often the primary destination. As a result, consumers:
  - Spent longer in North Dakota, with trip length increasing from 2.1 to 2.7 nights.
  - Visited fewer other states during their trips, resulting in shorter overall trips.
- Travel party composition shifted, with fewer parties traveling with friends and more traveling with children younger than 18.
- Though the per-person, per-day spending was down, with more nights and fewer people, overall trip spending was up.

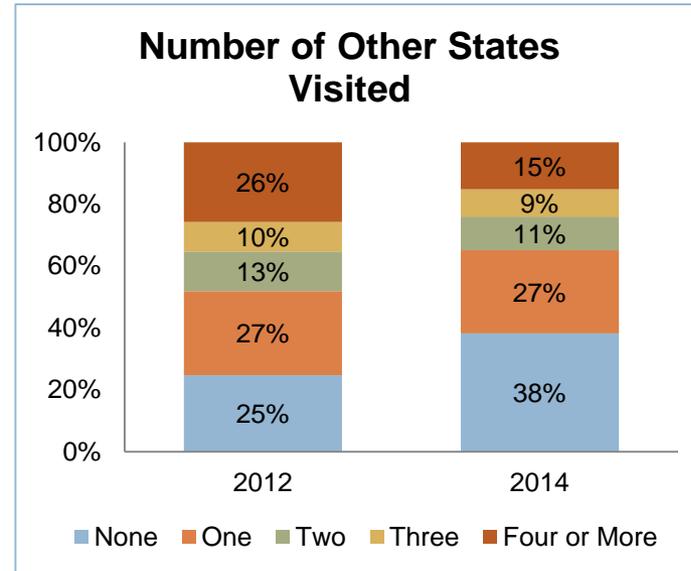
Overnight Trips	2012	2014
Total nights on trip	10.6	9.5
Nights in ND	2.1	2.7
ND was main destination of overnight trip	43%	52%
Number of other states visited	2.4	1.7
% of visitors driving – car or RV	79%	78%
% Using paid accommodation – hotel or B&B	81%	76%
Day Trips		
ND was main destination of day trip	62%	60%

	2012	2014
Number in travel party	3	2.9
Travel Party Composition		
Spouse/significant other	73%	77%
Kids on trip	24%	39%
Other family	14%	14%
Friends	23%	9%
Expenditures – per person/per day		
Day trip	\$137	\$154
Overnight	\$129	\$115

# Destination of Trip

- Given North Dakota is the primary destination of more overnight trips, there were fewer multi-state trips. Far more households only visited North Dakota while on their trips. As a result, the number of other states visited on the same trip declined.

Additional States Visited	2012	2014
South Dakota	27%	28%
Wyoming	16%	23%
Montana	21%	19%
Minnesota	26%	12%
Nebraska	12%	11%
Colorado	8%	9%
Idaho	10%	7%
Iowa	12%	7%
<b>Average number of additional states visited</b>	<b>2.4</b>	<b>1.7</b>



# Trip Timing

- There were slight shifts in the timing of marketable (again, this is non-VFR) leisure trips, with a more evident peak during the summer months of May to August.
- Because a trip to North Dakota would require considerably more travel time for the distant markets, it is notable that Tier 3 consumers more often visited in winter months. Demographically, this group is more likely to be younger and single. And their trips more often include skiing and snowmobiling.

Marketable Leisure Trips	2012	2014
January	17%	12%
February	19%	18%
March	16%	14%
April	17%	13%
May	24%	24%
June	32%	28%
July	24%	29%
August	29%	19%
September	19%	11%
October	17%	15%
November	11%	9%
December	7%	8%

Marketable Leisure Trips	Tier 1	Tier 2	Tier 3
January	10%	10%	14%
February	14%	11%	26%
March	10%	5%	24%
April	10%	12%	15%
May	18%	21%	28%
June	41%	31%	22%
July	32%	32%	25%
August	13%	17%	23%
September	10%	8%	15%
October	18%	16%	15%
November	7%	4%	15%
December	8%	9%	7%

# Trip Purpose

- With some more distant states, such as Colorado and Idaho showing up as having stronger rates of travel to North Dakota, closer states like Nebraska and Iowa have fallen a bit. With this shift, there is more visitation by new North Dakota visitors, those who have never visited before. Though repeat visitation makes up more than a third of leisure travelers, there was a significant increase in those visiting from word-of-mouth recommendations.

Reason for Visiting	2012	2014
I had been there before and enjoyed it	46%	36%
I wanted to try somewhere new and different	29%	29%
I had heard about it from friends or family	8%	19%
It offered a specific activity or event	15%	11%
It offered something that I couldn't get anywhere else	3%	5%

# Trip Planning

- Given some more distant markets are visiting, which means there is less repeat travel, it is surprising that use of the Internet for planning purposes slipped.
- As “heard about it from friends and relatives” increased as the primary reason for visiting North Dakota, the use of these resources as a planning source had a corresponding increase.

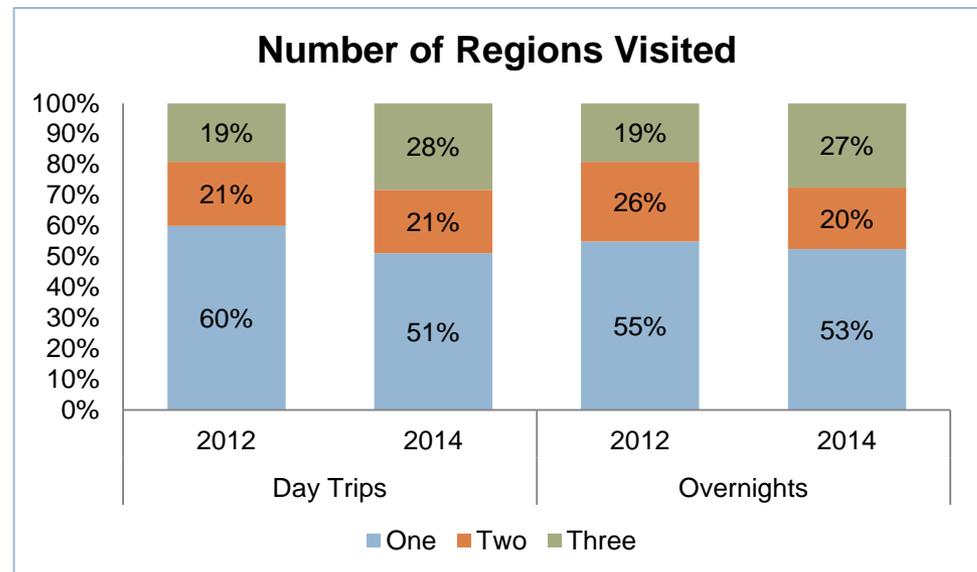
Overnights	2012	2014
Used Internet	71%	62%
Talked to friends and family	33%	52%
Called 800 number to request info	5%	17%
Contacted individual attraction or event	12%	15%
Contacted individual chamber of commerce	2%	8%
None	10%	6%
Other	9%	3%

Day Trips	2012	2014
Used Internet	59%	57%
Talked to friends and family	30%	55%
Called 800 number to request info	9%	19%
Contacted individual attraction or event	5%	16%
Contacted individual chamber of commerce	6%	8%
None	17%	5%
Other	5%	2%

# Destinations for Marketable Trips

- In the previous measure, when there was considerably more travel from neighboring states, visitors were coming in for a day trip and visiting only a single region. For 2014, there is more travel from distant consumers. While they often are staying overnight, those that are considered day trips are often traveling the length of the state and making numerous stop along the way. As a result, the less accessible Central Region sees an increase in visitation from day trip visitors and an increase in the total number of regions visited.
- Overnight visitors are staying longer on their trips, which enable them to visit more regions of the state as well.

	Day Trips		Overnight	
	2012	2014	2012	2014
East Region	66%	56%	52%	47%
Central Region	34%	43%	47%	39%
West Region	57%	49%	65%	45%



# East Region Destinations

- Visitation to individual destinations and attractions did not change much from the previous measure, though there was some decline in visitation to the more urban areas of the region in Fargo and Grand Forks.
- As a number of attractions were added to the 2014 survey, many do not have visitation levels tracked from 2012.

East Region	2012	2014
Alerus Center	3%	4%
Bonanzaville USA	2%	5%
Chahinkapa Zoo	NA	6%
Dakota Magic Casino	4%	4%
Fargo	24%	19%
Fargo Air Museum	7%	8%
Fargodome	4%	1%
Fort Abercrombie	NA	5%
Fort Ransom State Park	5%	6%
Gingras Trading Post	NA	5%
Grand Forks	12%	9%
Heritage-Hjemkost Interpretative Center	2%	3%
Icelandic State Park	3%	5%
Pembina Museum	NA	3%
Ralph Engelstad Arena	NA	2%
Red River Zoo	4%	8%
Scheels All-Sports Superstore	NA	0%
Sheyenne National Grasslands	NA	6%
Sheyenne River Valley National Scenic Byway	5%	5%
Turtle River State Park	5%	3%
Valley City	2%	2%
Wahpeton	NA	0%
West Acres	2%	1%

# Central Region Destinations

- The difficulty of access to the Central Region and its lack of an urban center result in overall less travel.
- However, the Region’s primary products, Devil’s Lake and the State Park, did show increases in visitation.

Central Region	2012	2014
Arrowwood National Wildlife Refuge	4%	4%
Devil’s Lake	13%	14%
Devil’s Lake State Parks	10%	15%
Double Ditch Indian Village	NA	2%
Former Governor’s Mansion	NA	4%
Fort Mandan	NA	6%
Fort Stevenson State Park	5%	5%
Fort Totten	NA	2%
Four Bears Casino	5%	4%
Graham’s Island State Park	NA	4%
International Peace Garden	3%	3%
Jamestown	6%	4%
Lake Metigoshe State Park	NA	4%
Lewis & Clark Interpretive Center	NA	6%
Minot	6%	5%
Roosevelt Zoo	NA	7%
Rugby-Geographical Center of North America	NA	2%
Scandinavian Heritage Park	NA	2%
Spirit Lake Casino	2%	3%

# West Region Destinations

- The West Region had declines in visitation from both day and overnight leisure visitors.
- Most dramatic was the drop in visitation to the Theodore Roosevelt National Park. Certainly this premier product in the state continues to hold great potential. With the National Park Service’s Centennial in 2016, there will be considerable promotion from the organization to these properties.
- North Dakota Tourism should consider how to best capitalize on the likely influx of visitors a promotion from the National Park Service would likely generate.

West Region	2012	2014
Bismarck/ Mandan	13%	9%
Chateau de Mores	NA	1%
Cowboy Hall of Fame	6%	5%
Custer House	7%	10%
Dakota Zoo	9%	8%
Dickinson	4%	3%
Fort Abraham Lincoln State Park	NA	6%
Fort Union Trading Post National Historic Site	3%	4%
Indian Hills State Recreational Area	5%	5%
Knife River Indian Villages National Historic Site	NA	7%
Lake Sakakawea	5%	5%
Lewis and Clack State Park	8%	9%
Medora	5%	2%
Missouri-Yellowstone Confluence Center/Fort Buford	NA	6%
North Dakota Capitol	7%	10%
North Dakota Heritage Center	NA	6%
On-A-Slant Indian Village	NA	1%
Raging Rivers Waterpark	3%	3%
Standing Rock National Native American Scenic Byway	NA	6%
Theodore Roosevelt National Park	17%	12%
Watford City	NA	1%
Williston	5%	3%

# Marketable Overnight Trip Activities

- Though visitation to the state’s national park dropped, visiting a park continues to generate the highest participation and be the biggest motivator for North Dakota trips.
- Through the survey process, visitors indicated which activities they participated in, and of those, were asked which motivated their trip. Activities can have high participation but little motivation (like eating at unique restaurants) or have little participation but high motivation.

Overnight Marketable	Participate	Motivate
Visited a state or national park	57%	32%
Ate at unique, local restaurants	56%	12%
Visited historical sites	43%	16%
Scenic drive	36%	16%
Visiting museums	34%	10%
Shopping	28%	9%
Hiking or backpacking	26%	13%
Wildlife watching	24%	6%
Sightseeing tour	23%	9%
Visited Native American sites	20%	9%
Attended a meeting or convention	19%	8%
Fishing	18%	6%
Attended a festival or fair	16%	4%
Bicycling or mountain biking	15%	5%
Camping	15%	6%
Horseback riding	13%	5%
Visited a farm, ranch or agritourism site	11%	1%
Attended performing arts (music/theater)	11%	4%
Boating	10%	2%
Bird watching	9%	2%
Hunting	8%	3%
Snow skiing or snowboarding	8%	4%
Canoeing or kayaking	7%	4%
Gambling	5%	1%
Snowmobiling	5%	2%
Motorcycling	4%	1%
Golfing	4%	0%

# Marketable Day Trip Activities

- Day trips have a similar distribution to overnights, with some additional motivation for hiking, bird watching and performing arts events.

Day Trips	Participate	Motivate
Visited a state or national park	53%	33%
Hiking or backpacking	28%	17%
Bird watching	9%	17%
Attended performing arts (music/theater)	13%	15%
Scenic drive	29%	13%
Visiting museums	33%	12%
Golfing	5%	11%
Ate at unique, local restaurants	55%	9%
Visited historical sites	35%	9%
Bicycling or mountain biking	17%	7%
Camping	13%	7%
Attended a festival or fair	21%	7%
Visited a farm, ranch or agritourism site	11%	6%
Horseback riding	13%	6%
Attended a meeting or convention	22%	6%
Snow skiing or snowboarding	9%	5%
Snowmobiling	9%	4%
Fishing	16%	4%
Boating	12%	4%
Canoeing or kayaking	5%	2%
Hunting	7%	2%
Motorcycling	6%	2%
Shopping	24%	2%
Wildlife watching	24%	2%
Sightseeing tour	23%	1%
Visited Native American sites	19%	1%
Gambling	5%	0%

# Marketing Trip Activities

- Based on the size of the audience participating in activities and how motivating they are in prompting their trip to the state, North Dakota Tourism can make some decisions about how best to promote various products.
- Those activities with a large audience and high motivation are good products for North Dakota Tourism to feature in its mass marketing like TV. The small audience, high motivation activities are good for niche print publications.
- The activities with low motivation are best marketed at the local level by industry partners.



# Visitor Demographics

- With the shift to more families traveling with children and less travel with friends, the overall age of visitors was slightly younger.
- With a younger overall visitor, income and educational attainment were slightly lower as well.

Marital Status	2012	2014
Married/With partner	74%	67%
Single (never married)	17%	25%
Divorced	7%	7%
Widowed	2%	2%
Education		
High school graduate or less	13%	15%
Some college or technical school	26%	28%
College graduate	35%	40%
Graduate work/advanced degree	26%	18%
Income		
Less than \$25,000	6%	6%
\$25,000 but less than \$50,000	19%	18%
\$50,000 but less than \$75,000	26%	26%
\$75,000 but less than \$100,000	25%	22%
\$100,000 or above	25%	27%
Average Income	\$72,593	\$71,324
Gender		
Male	45%	48%
Female	55%	52%
Age	47	44

# SEGMENTATION

# Outdoor Segmentation

- SMARInsights has developed a segmentation system that is designed to understand consumer participation and motivation in outdoor activities. By understanding how loyal consumers are to some of North Dakota’s primary products, marketing strategies can be developed to target the kinds of travelers in each segment.
- Below is a description of the segments, along with the national distribution of each segment based on thousands of interviews SMARInsights has conducted for other entities besides North Dakota Tourism.

Segment	Short Description	National Participation
Family Outdoors	These people enjoy participating in outdoor activities with family. They participate in a wide variety of outdoor activities, especially camping. They are motivated by spending time with family, scenery and making memories. North Dakota visitors most often fit in this segment, and is a good target for marketing efforts.	10%
Outdoor Enthusiasts	This segment is the most avid about outdoor activities. They are motivated by fun, recharging/relaxing, and simply getting away and enjoying the outdoors. They like being outdoors and care about taking care of it. This is an appealing segment for NDT given the state’s share of visitors in this category and their trip spending.	8%
Dabblers	This segment is not avid about any specific activity. They dabble in many activities on certain occasions such as vacations or when invited to participate. Thus there is a social aspect to their activity choices, and they like to try new things.	24%
Outdoor Excitement	This segment also enjoys participating in outdoor activities, but they are not motivated by spending time with family and making memories. They are instead motivated by scenery, adventure, excitement and getting away to recharge.	8%
Affable Adventurers	This outdoorsy adventure-seeking and sociable segment indexes high on all boating and fishing activities. They choose activities that allow them to be with family and friends while giving them a sense of adventure and excitement.	9%
Non-Target	This audience is not motivated by outdoor activities. Often, they are not very active and tend to be interested in either the arts or gambling. The arts-leaning visitors are motivated by activities they provide relaxation while the gamblers seek competition and excitement.	37%

# North Dakota Segments

- As seen in the 2012 measure, North Dakota visitors are far more likely to participate in and be interested in outdoor activities than the average U.S. traveler. On the previous page, 37% of all U.S. consumers are not classified in an outdoor segment and would not be motivated by these kinds of products.
- Given the outdoor product in the state, it is not surprising that North Dakota would attract a larger portion of consumers interested in these activities. While there are some Dabblers, many of the North Dakota visitors are highly invested in this type of product. More than a third of day trips and a quarter of overnights are by Outdoor Enthusiasts – the most ardent consumers of these products.

Marketable Day Trips	2012	2014
Family Outdoors	32%	28%
Outdoor Enthusiasts	27%	34%
Dabblers	16%	10%
Non-Target	13%	10%
Outdoor Excitement	5%	10%
Affable Adventurers	6%	8%

Marketable Overnight Trips	2012	2014
Family Outdoors	35%	36%
Outdoor Enthusiasts	22%	27%
Dabblers	18%	14%
Non-Target	12%	15%
Outdoor Excitement	7%	8%
Affable Adventurers	6%	2%

# Segment Trip Specifics

- As seen in previous measures, the Outdoor Enthusiasts spend longer in North Dakota on their trips than other outdoor segments while spending significantly more than any other audience. The Family Outdoors segment is developed based on the trip activities, but it is the Enthusiasts who are more often visiting with children.

	Dabblers	Family Outdoors	Affable Adventurers	Outdoor Enthusiasts	Outdoor Excitement	Non-Target
Number of Nights	2.3	2.4	2.8	3.3	1.5	3.2
Kids on Trip	24%	41%	13%	53%	22%	17%
Trip Spending	\$975	\$833	\$1,162	\$1,726	\$818	\$913
East Region	39%	39%	47%	56%	39%	35%
Central Region	36%	28%	42%	44%	30%	36%
West Region	35%	47%	43%	50%	31%	25%

# Segment Trip Activities

- Rather than looking at participation rates of each activity by all of the segments, an easy way to see who is doing what on their trips is by creating an index. Here, 100 is the average participation rate by all leisure visitors. An index of 110 is 10% above average while an index of 90 is 10% below average.
- Using an index, it is evident why the Outdoor Enthusiasts spend significantly more on their North Dakota trips. Simply, they do more.

	Dabblers	Family Outdoors	Affable Adventurers	Outdoor Enthusiasts	Outdoor Excitement	Non-Target
Boating	71	41	26	198	0	1
Bird watching	68	47	45	192	0	0
Canoeing or kayaking	38	59	56	187	86	0
Hunting	53	55	16	186	0	33
Snowmobiling	23	56	0	171	183	91
Fishing	32	72	136	170	56	0
Camping	51	38	199	169	3	41
Snow skiing or snowboarding	74	52	0	166	79	78
Horseback riding	51	78	52	166	45	24
Visited a farm, ranch or agritourism site	84	64	59	158	22	36
Attended performing arts (music/theater)	45	87	24	155	0	72
Attended a festival or fair	71	71	38	151	29	79
Hiking or backpacking	62	83	92	150	21	38
Visited Native American sites	49	88	97	150	36	31
Sightseeing tour	79	80	44	143	0	75
Wildlife watching	42	101	175	136	0	30
Bicycling or mountain biking	82	103	51	128	0	57
Attended a meeting or convention	91	86	10	128	55	103
Visiting museums	42	102	103	120	109	93
Shopping	79	81	135	119	48	101
Visited historical sites	59	101	124	113	119	86
Golfing	104	126	88	111	0	26
Visited a state or national park	73	108	115	109	87	77
Ate at unique, local restaurants	64	108	78	108	150	97
Gambling	112	59	151	99	208	146
Scenic drive	79	117	135	93	79	103
Motorcycling	59	178	35	71	181	86

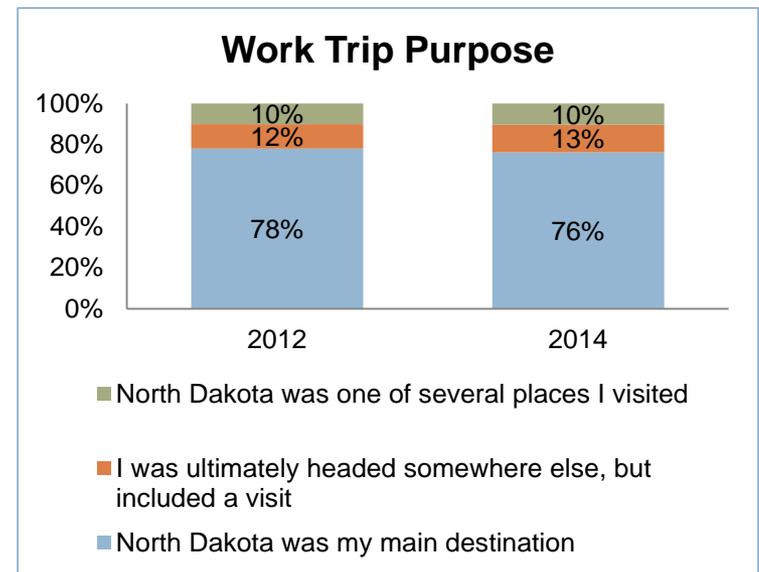
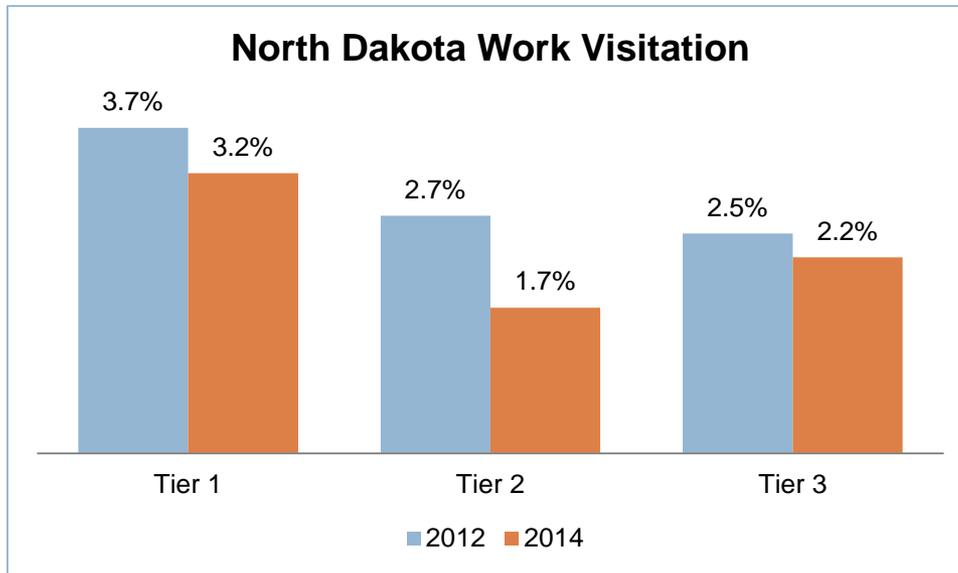
# Segment Demographics

Marital Status	Dabblers	Family Outdoors	Affable Adventurers	Outdoor Enthusiasts	Outdoor Excitement	Non-Target
Married	52%	63%	61%	74%	62%	67%
Divorced/Separated	9%	12%	6%	6%	9%	7%
Widowed	0%	1%	0%	1%	6%	5%
Single/Never married	38%	24%	34%	19%	23%	21%
<b>Education</b>						
High school or less	12%	12%	21%	16%	9%	13%
Some college/technical school	35%	21%	20%	23%	63%	39%
College graduate	44%	42%	50%	43%	22%	28%
Post-graduate degree	9%	25%	9%	18%	6%	21%
<b>Income</b>						
Less than \$25,000	0%	7%	5%	6%	1%	4%
\$25,000 but less than \$50,000	13%	12%	19%	22%	41%	34%
\$50,000 but less than \$75,000	39%	30%	28%	18%	35%	25%
\$75,000 but less than \$100,000	29%	23%	25%	18%	23%	22%
\$100,000 or above	19%	28%	23%	36%	0%	15%
<b>Ethnicity</b>						
African American	11%	6%	0%	7%	11%	6%
Asian American	5%	12%	0%	9%	0%	1%
Caucasian	83%	76%	89%	75%	82%	89%
Hispanic/Latin American	5%	4%	11%	12%	8%	4%
Mixed ethnicity	5%	4%	0%	3%	0%	0%
<b>Gender</b>						
Male	56%	43%	57%	48%	60%	29%
Female	44%	57%	43%	52%	40%	71%
Kids in household	36%	41%	22%	62%	27%	33%
Average age	41	47	38	39	43	50

# WORK TRIPS

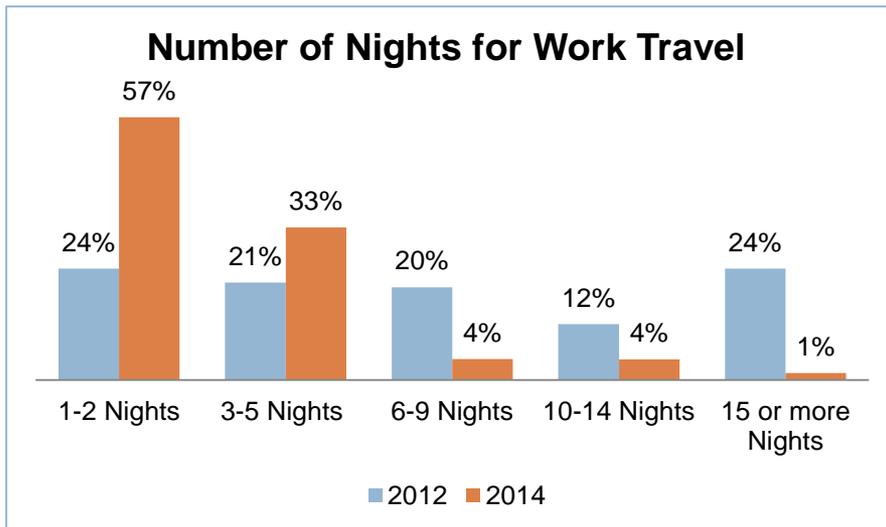
# Visitation for Work

- North Dakota has been uniquely positioned in recent years for business travel, which has been filling – and overflowing – hotels rooms. However, this is not traditional white collar business travel. This travel was related to the shale gas industry that was a boon for the state. However, with the decline in oil prices, there has been less need for the gas extracted through the fracking process. As a result, visits to North Dakota for work have declined in the past two years.



# Work Trip Specifics

- Previously, many of these work visitors were staying for many weeks in the shale fields, with nearly a quarter staying 15 nights or more. With shifts in the industry, the length of a work trip has declined dramatically and mirrors national business travel more closely. More than half of trips are only one or two nights.



Work Trips	2012	2014
Lodging	\$276	\$304
Meals/Food/Groceries	\$182	\$176
Entertainment	\$111	\$114
Activities	\$110	\$102
Shopping	\$161	\$183
Transportation	\$204	\$221
Other	\$82	\$64
<b>Total</b>	<b>\$1,125</b>	<b>\$1,163</b>

# QUESTIONNAIRE

# Questionnaire

## North Dakota Visitor Profile January 2014

Thank you for participating in our research study. Your opinions are valuable to us. This survey is for research purposes only. No sales effort will ever result from your participation. This survey should take approximately ten minutes of your time.

S1 First, what is your ZIP code? \_\_\_\_\_ ALLOW CANADIAN POSTAL CODES

- S2. What is your age?
1. Under 18 – TERMINATE
  2. 18-35
  3. 35-55
  4. Over 55

Think for a moment about any travel that you've taken in the last two years. This would be any trip that:

- was for leisure
- was for work;
- involved an overnight stay away from home, or
- was a day trip at least 50 miles from home.

Q1. Have you visited any of the following states or provinces in the last two years? Please indicate if you have visited for leisure or work

	I live here	Visited for leisure	Visited for work
Iowa			
Nebraska			
North Dakota			
Manitoba (Canada)			
Minnesota			
Montana			
Saskatchewan (Canada)			
South Dakota			
Wyoming			
None of these			

IF ALL AT Q1 – 0 LEISURE OR WORK TRIPS, THANK AND TERMINATE.  
IF Q1 NORTH DAKOTA > 0 TRIPS, ASK Q2. IF RESPONDENT IS NOT A NORTH DAKOTA VISITOR, BUT HAS VISITED ANOTHER STATE, ASK Q2 THEN THANK AND TERMINATE.

Q2. (SHOW STATES VISITED IN LAST TWO YEARS) Below you will see the states and provinces you indicated you have visited in the last two years. Please indicate the number of trips to each state and province that were daytrips, the number of trips to each that were overnight trips, and the number that were for business.

[LIST ALL TRIPS FROM Q1]

	Number of Trips in the last two years	Number of trips that were daytrips	Number of trips that were overnight leisure trips	Number of trips that were daytrips for work	Number of trips that were overnight trips for work
Iowa					
Nebraska					
North Dakota					
Manitoba (Canada)					
Minnesota					
Montana					
Saskatchewan (Canada)					
South Dakota					
Wyoming					

Below you will see one of the states you indicated you have visited and the number of trips taken in the last two years. Please indicate the month of trip, length of stay, and if the main purpose was to visit friend and family.

Q5. Please tell us a little more about your North Dakota trip(s). If you are listing multiple trips, the most we will ask you about is 6. Thinking about ... PROGRAMMING: BRING IN THE APPROPRIATE NUMBER OF TRIPS FROM Q2 – DAY LEISURE, OVERNIGHT LEISURE, DAY WORK AND OVERNIGHT WORK

	Type of Trip	Year of trip (DROP DOWN WITH 2011 AND 2012)	Month of trip (DROP DOWN WITH MONTHS – JAN THRU MAY)	How many nights did you stay (enter 0 if daytrip) (let respondent enter number)	Main purpose was to visit friends or family
North Dakota trip(s) [INSERT TRIP #]	POPULATE FIELD				

[RANDOMLY SELECT NORTH DAKOTA TRIP SELECTING ONE WHO'S PRIMARY MOTIVATION WAS **NOT** TO VISIT FRIENDS AND FAMILY FIRST – IF NONE, THEN RANDOMLY SELECT ANY. PLEASE PULL IN MONTH AND LENGTH OF TRIP TO INDICATE WHAT TRIP – EG. 5 NIGHT TRIP IN JANUARY 2012. ASK Q7- Q21 FOUR TIMES IF POSSIBLE, FOR ONE DAY LEISURE TRIP, ONE OVERNIGHT LEISURE TRIP, ONE DAY WORK TRIP AND ONE OVERNIGHT WORK TRIP.]

# Questionnaire

Q7. What method of transportation did you use to travel to Wyoming on your (INSERT LENGTH AND MONTH FROM NORTH DAKOTA Q5) trip?

1. Drove via car, van, truck or SUV
2. Drove via RV
3. Flew/airplane Specify airport \_\_\_\_\_
4. Bus or motorcoach trip
5. Motorcycle
6. Other (Please specify \_\_\_\_\_)

Q8. Which of the following best describes your visit to North Dakota on your (INSERT LENGTH AND MONTH FROM NORTH DAKOTA Q5)?

1. North Dakota was my main destination.
2. I was ultimately headed somewhere else, but included a visit in North Dakota.
3. North Dakota was one of several places I decided to visit on this trip.

Q8A. What other states did you visit on this trip?  
[INCLUDE STATE LIST WITH CHECK BOXES INCLUDE  
NO OTHER STATES VISITED AT END OF LIST]

IF Q8=2 OR 3 ASK Q8B & Q8C. OTHERS SKIP TO Q9. IF DAYTRIP AND Q8=2 OR 3, ASK Q8B BUT SKIP Q8C.

Q8B. HOW MANY NIGHTS DID YOU SPEND ON YOUR ENTIRE TRIP? \_\_\_\_\_  
Q8C. HOW MANY NIGHTS DID YOU SPEND IN NORTH DAKOTA DURING YOUR TRIP? \_\_\_\_\_

Q9. Which of the following best describes the reason you chose to visit North Dakota on this trip?

1. I had been there before and enjoyed it
2. I wanted to try somewhere new and different
3. I had heard about it from friends or family
4. It offered a specific activity or event
5. It offered something that I couldn't get anywhere else
6. I went to visit friends or family
7. I had business in the state

Q10. Prior to your (INSERT LENGTH AND MONTH FROM Q5) visit to North Dakota, which of the following sources did you use to gather information for planning your trip?

1. Called 800 number to request info
2. Talked to friends and family
3. Used Internet
4. Contacted individual attraction or event to request information
5. Contacted individual chamber of commerce to request information
6. Other (Please specify \_\_\_\_\_)
7. None

Q11. How far in advance did you begin planning that [INSERT LENGTH AND MONTH FROM Q5] trip to North Dakota?

1. Less than 1 month
2. At least 1 month, but less than 2 months
3. At least 2 months, but less than 3 months
4. At least 3 months, but less than 6 months
5. 6 months or more

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Q12. Including yourself, how many people were in your travel party? \_\_\_\_\_

Q13. Of those, how many were children under age 18? \_\_\_\_\_

Q14. With whom did you travel...

- Spouse / significant other
- Child(ren)/Grandchild(ren): age 0-12
- Child(ren)/Grandchild(ren): age 13+
- Other Family
- Friends/Acquaintances
- I traveled alone

Q15. What forms of lodging did you use during your trip? (Mark all that apply.)

1. Hotel or motel
2. Inn, lodge, or bed & breakfast
3. Resort or dude ranch
4. RV park
5. Campground
6. Rental home, condominium or timeshare
7. With friends or family
8. Other (Please specify \_\_\_\_\_)

Q16. Which of the following activities did you participate in during your trip to North Dakota [INSERT LENGTH AND MONTH FROM Q5]? (Mark all that apply.)

NOTE TO PROGRAMMER, SHOW ON 2 SCREENS

Hiking or backpacking	Ate at unique, local restaurants	
Visited a state or national park	Attended a meeting or convention	
Bicycling or mountain biking	Attended a festival or fair	
	Attended performing arts (music/theater)	
	Visited historical sites	
Horseback riding	Visited Native American sites	
Hunting	Visited a farm, ranch or agritourism site	
Camping	Wildlife watching	
Snow skiing or snowboarding	Bird watching	
Snowmobiling	Scenic drive	
Canoeing or kayaking	Sightseeing tour	
	Golfing	
Boating	Shopping	
Fishing	Gambling	
Visiting museums	Other	
Motorcycling	None of the above	

PROGRAMMER: BRING UP THOSE MARKED IN Q16 AS WELL AS "None of the above"

Q17. Of the following in which you said you participated, which motivated you to travel to North Dakota on your [INSERT LENGTH AND MONTH FROM]?

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# Questionnaire

FOR EACH REGION MARKED AT Q18, ASK Q19  
 Q19. Which of the following places or attractions did you visit in North Dakota?

East Region	Central Region	West
Fargo	Minot	Bismarck/ Mandan
West Acres	Devil's Lake	Lake Sakakawea
Grand Forks	Jamestown	Scenic Byways
Heritage-Hjemkost Interpretative Center	International Peace Garden	Cowboy Hall of Fame
Fargodome	Devil's Lake State Parks	North Dakota Capitol
Dakota Magic Casino	Four Bears Casino	Williston
Ralph Engelstad Arena	Fort Stevenson State Park	Dickinson
Fargo Air Museum	Arrowwood National Wildlife Refuge	Indian Hills State Recreational Area
Wahpeton	Rugby-Graphical Center of North America	Theodore Roosevelt National Park
Bonanzaville USA	Spirit Lake Casino	Lewis and Clark State Park
Alerus Center		Fort Union Trading Post
Sheyenne River Valley National Scenic Byway		Medora
Sheyenne National Grasslands		Raging Rivers Waterpark
Turtle River State Park		Dakota Zoo
Pembina	Lewis & Clark Interpretive Center	Standing Rock National Native American Scenic Byway
Scheels All-Sports Superstore	Fort Mandan	Watford City
Red River Zoo	Scandinavian Heritage Park	Knife River Indian Villages National Historic Site
Chahinkapa Zoo	Roosevelt Zoo	Fort Union Trading Post National Historic Site (just added National Historic Site)
Valley City		North Dakota Heritage Center
Fort Ransom State Park		Custer House

Q20. Thinking about your overall travel experience on this trip to North Dakota, would you say it was...

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

Q21. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your trip to North Dakota. Please estimate how much you spent on each of the following and enter the amounts in whole dollars in the boxes provided. Please only estimate expenditures while you were in North Dakota.

- a. Lodging \_\_\_\_\_
- b. Meals/Food/Groceries \_\_\_\_\_
- c. Entertainment (such as admission for events or attractions) \_\_\_\_\_
- d. Activities (including park entrance fees and equipment rental) \_\_\_\_\_
- e. Shopping \_\_\_\_\_
- f. Transportation \_\_\_\_\_
- g. Other \_\_\_\_\_

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Q23. Please select which of the following best describes how often you participate in each of the following activities:

	Every chance you get	Often	Occasionally when you have an opportunity	You've done it, but it was over a year ago	You have not done it, but would like to try sometime	You have never done it and probably never will
Camping						
Hunting						
Hiking						
Fishing (freshwater, saltwater, or fly fishing)						
Boating (motor boating, canoeing, kayaking, or sailing)						
Wildlife viewing or bird watching						
Visiting a state or national park						
Target shooting						
Outdoor adventure activities such as rock climbing, sky diving, zip lining, mountain biking, etc.						

Q24. Thinking about the activities we have discussed that you do, how much do you agree that the following describe something that motivates you to participate?

	1 Completely Disagree	2	3	4	5 Completely Agree
It's exciting					
I like the adventure					
It's a good way to spend time with friends					
I only do these on certain occasions such as when on vacation and looking for an activity					
It's a great way to spend time with kids/grandkids					
It's a great way to enjoy the outdoors					
It's a good way to create memories					
I enjoy looking at the scenery					
It's something my family enjoys					

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# Questionnaire

Q25. Thinking about the activities we have discussed that you do, which of the following best describes you?

- I like many of these outdoor activities, but would not consider myself avid about any of them
- I am avid about these activities and would consider myself an outdoor enthusiast
- I enjoy participating in these outdoor activities with my family
- I participate in these outdoor activities for the adventure and excitement
- I enjoy the social and adventure aspects of these outdoor activities
- None of these describe me

**DEMOGRAPHICS**

These last few questions are for classification purposes only.

1. Are you...
  - Married/With partner..... 1
  - Single (never married)..... 2
  - Divorced ..... 3
  - Widowed..... 4
  
2. Including yourself, how many people are currently living in your household?  
SKIP TO Q4-->
  - ONE..... 1
  - TWO ..... 2
  - THREE ..... 3
  - FOUR ..... 4
  - FIVE OR MORE..... 5
  
3. How many children under the age of 18 live in your household? \_\_\_\_
  
4. Which of the following categories represents the last grade of school you completed?
  - HIGH SCHOOL GRADUATE OR LESS..... 1
  - SOME COLLEGE OR TECHNICAL SCHOOL..... 2
  - COLLEGE GRADUATE..... 3
  - GRADUATE WORK/ADVANCED DEGREE..... 4
  
5. Which of the following categories best represents the total annual income for your household before taxes?
  - \$1 less than \$25,000 ..... 1
  - \$25,000 but less than \$50,000..... 2
  - \$50,000 but less than \$75,000..... 3
  - \$75,000 but less than \$100,000 ..... 4
  - \$100,000 or above..... 5
  
6. What is your age? .....

7. Which of the following best describes your ethnic heritage?
  - African American.....1
  - Asian American.....2
  - Caucasian .....3
  - Hispanic/Latin American.....4
  - Mixed ethnicity.....5
  
8. Are you.....  Male  Female