



2016 Advertising Effectiveness & ROI

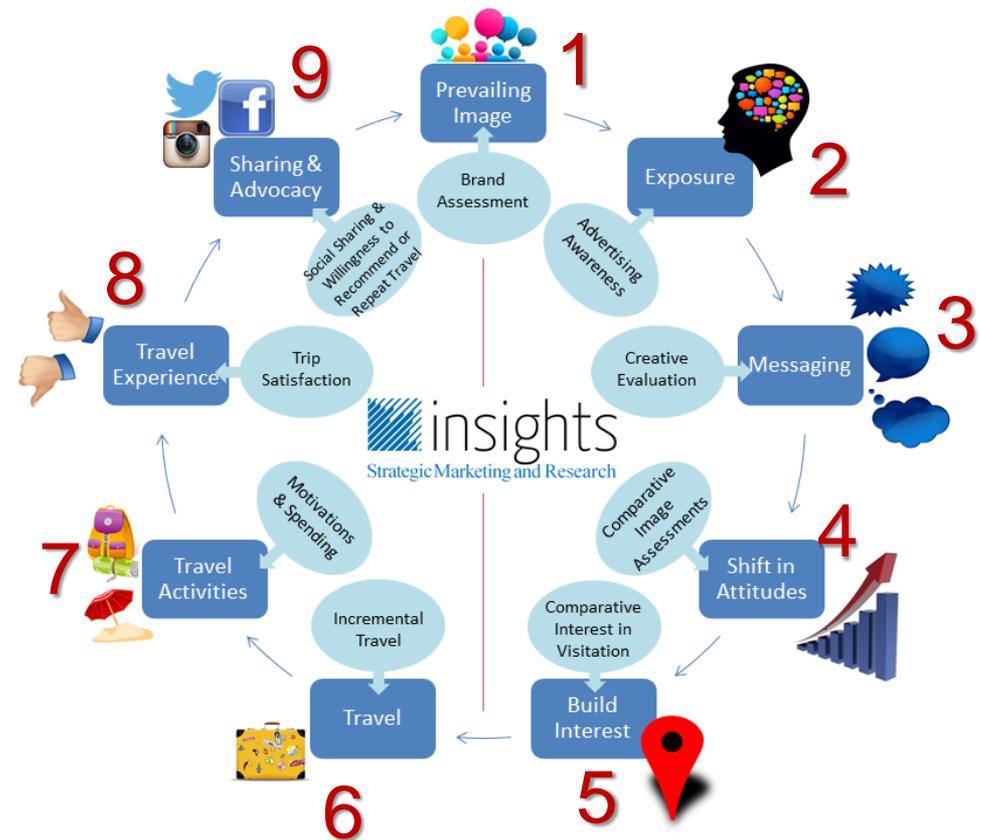
February 2017

Background

- The North Dakota Tourism Division introduced new creative to the Legendary brand position in 2016 featuring actor and native son Josh Duhamel.
- In order to be accountable for the resources invested in these efforts, the Division has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing.
- The specific objectives of this seasonal awareness research are to:
 - Measure the reach of the advertising among a targeted audience;
 - Evaluate the effectiveness of the marketing through SMARInsights' cost-per-aware household benchmarking;
 - Understand the overlap and potential impact of multiple media;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' destination marketing organization (DMO) benchmarking;
 - Assess the ability of the advertising to improve the image of the state, motivate interest in visiting, and increase visitation;
 - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
 - Forward insights into future refinement of the marketing.

Methodology

- SMARInsights has developed a research methodology based on how consumers make their travel decisions. The graphic outlines each step of the process and the measures used to evaluate the effectiveness of a destination's marketing efforts.
- SMARInsights typically breaks the process into two waves of research, with the first five steps of the process evaluated immediately at the conclusion of a destination's paid media. This allows the destination to capture recall at the peak of media placements. A second wave would then evaluate final four steps, including travel, after consumers had a chance to visit.
- But in order to allow for significant sample size in each of the target markets, this research evaluates the 2016 advertising on all phases of the process.



Methodology

- SMARInsights’ advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- The North Dakota Tourism Division placed media in target markets in the U.S. and Canada. Quotas were established in the spot markets with the largest media buys, but the marketing had the ability to reach farther into the Midwest and into Chicago as well.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Overall, more than 4,100 surveys were completed throughout North Dakota’s target markets.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. The questionnaire and the ads tested appear in the Appendix to this report.

	Completed Surveys
Minneapolis	606
Milwaukee	601
Madison	361
Green Bay	361
Duluth	361
MN, WI, IL	482
Chicago	372
Manitoba	483
Saskatchewan	482
Total	4,109

Campaign Overview

- The North Dakota Division of Tourism invested nearly \$3.2 million in paid marketing in 2016, with much of that allocated to TV and print.
- Minneapolis receives the most significant investment, with nearly 30% of the budget allocated to this primary market. Another 13.5% of the budget was spent in Milwaukee.
- Other smaller markets receive targeted investment with significant print and digital investments throughout the Midwest, including Chicago.
- Important Canadian provinces also received paid media.



Market	TV	Print	Digital	Outdoor	Sponsorship	Total
Minneapolis	\$387,440	\$163,066	\$116,622	\$145,710	\$109,510	\$922,349
Milwaukee	\$180,935	\$73,626	\$59,947	\$87,826	\$25,798	\$428,132
Madison	\$98,973	\$20,035	\$25,756		\$11,084	\$155,847
Green Bay	\$98,338	\$15,537	\$29,319		\$12,618	\$155,812
Duluth	\$58,402	\$7,373	\$11,001		\$12,990	\$89,766
MN, WI, IL	\$34,775	\$368,542	\$126,995			\$530,312
Chicago		\$152,802	\$231,772			\$384,574
Manitoba	\$96,780	\$158,499	\$80,124			\$335,403
Saskatchewan	\$58,127	\$40,775	\$70,228			\$169,130
Total	\$1,013,770	\$1,000,255	\$751,764	\$233,535	\$172,000	\$3,171,325

Insights

- With the introduction of a new campaign, the North Dakota Tourism Division was able to reach nearly 3.8 million households. From these, the marketing influenced more than 354,000 trips and generated more than \$328 million in visitor spending.
- Given the investment in paid media and sponsorship of nearly \$3.2 million, this results in a return on investment of \$104. While this is improved performance for the North Dakota Tourism Division, the ROI is below the average of \$129 SMARInsights' typically sees for state DMOs. The following could bring the state's performance on par with industry averages.



Market Insights

- Minneapolis receives the bulk of the marketing resources. Given its proximity, it is the market most familiar with North Dakota and generates a significant number of influenced trips.

But visitors from this market spend considerably less than visitors from other areas, resulting in one of the lower ROIs of the targeted markets. This, combined with a high cost per aware household, indicates resources could likely be shifted out of the market while still generating good levels of recall and influence.

Market Performance	Minneapolis	Wisconsin Target Markets (& Duluth)	Other MN, WI, IL, incl. Chicago	Manitoba	Saskatchewan
Cost per Aware HH	Below Average	Average	Above Average	Below Average	Below Average
Influenced Trips	Above Average	Average	Above Average	Above Average	Below Average
Economic Impact	Average	Below Average	Above Average	Average	Below Average
ROI	Below Average	Below Average	Above Average	Above Average	Average
Performance Key	Above Average	Average	Below Average		

Market Insights, cont.

- Other targeted markets in Wisconsin and Minnesota also have a high cost per aware household and low ROI. But they generate a good number of trips, an indication they can continue to be good targets, and NDTD could achieve similar results with less investment.
- Savings achieved by pulling back in Minneapolis and Milwaukee could allow the state to make additional investment in other parts of the Midwest, including Chicago. The population of these markets means even small levels of awareness and increment can generate a significant number of influenced trips.
- Of the Canadian markets, the high cost per aware household indicates NDTD could pull back the investment slightly, especially if the same campaign is able to be used and awareness has a chance to build.

Media Insights

- DMOs need media that can achieve two very different tasks: building the brand and spurring action. SMARInsights has seen that TV and print can be strong brand builders, while digital and outdoor are tactical executions that can spur action. NDTD is heavily invested in TV and print. Given that both are brand builders, it is likely a pull back in print could let TV carry the load of building the brand while shifting more resources into digital, which could present tactical call-to-action messaging.

Creative Insights

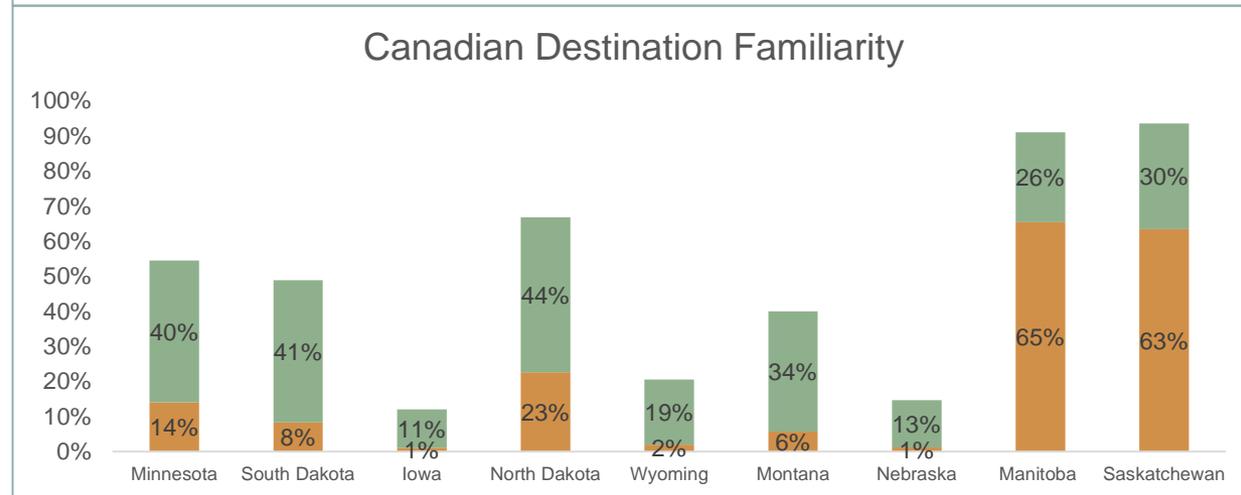
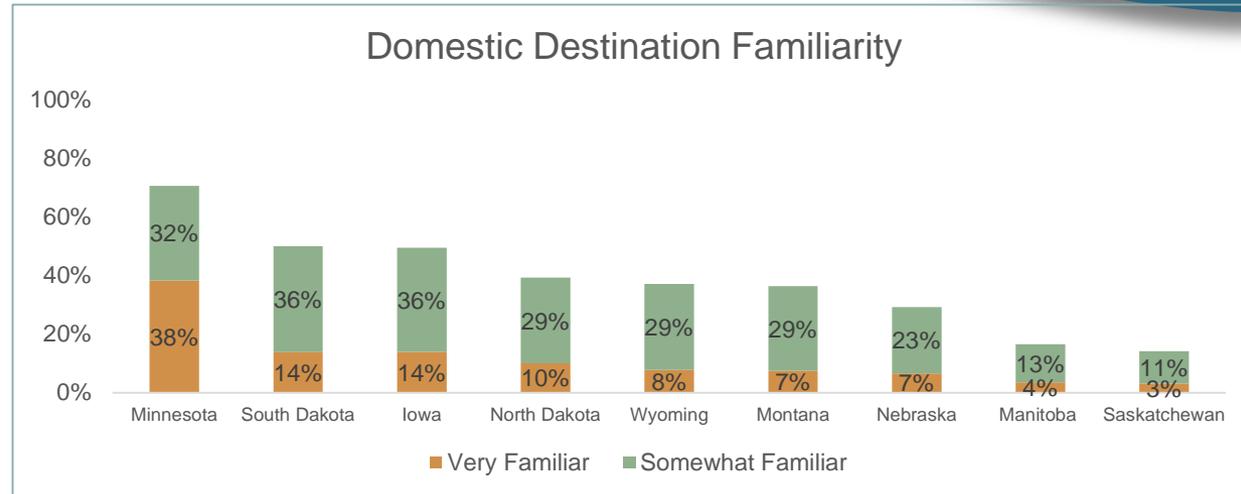
- The creative with Josh Duhamel generates some of the highest messaging ratings SMARInsights has seen. But because the ads don't generate as much interest in visiting, it's possible what is being communicated is not what consumers find motivating. By focusing on products and attributes considered drivers, the creative could generate higher impact ratings.

2016 Advertising Effectiveness & ROI

COMPETITIVE POSITION

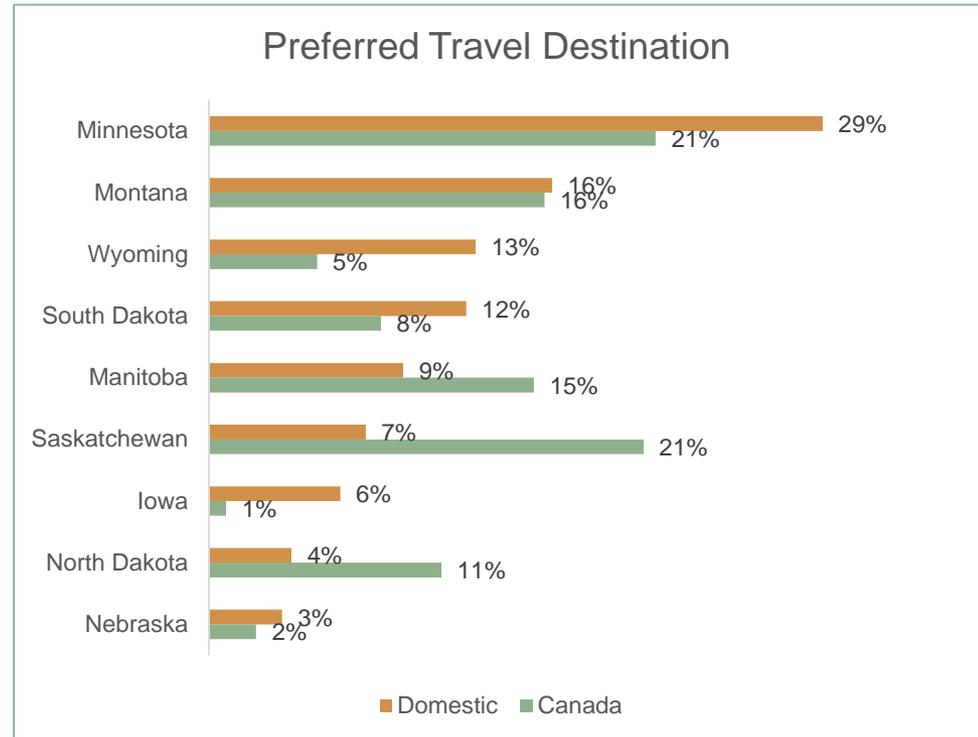
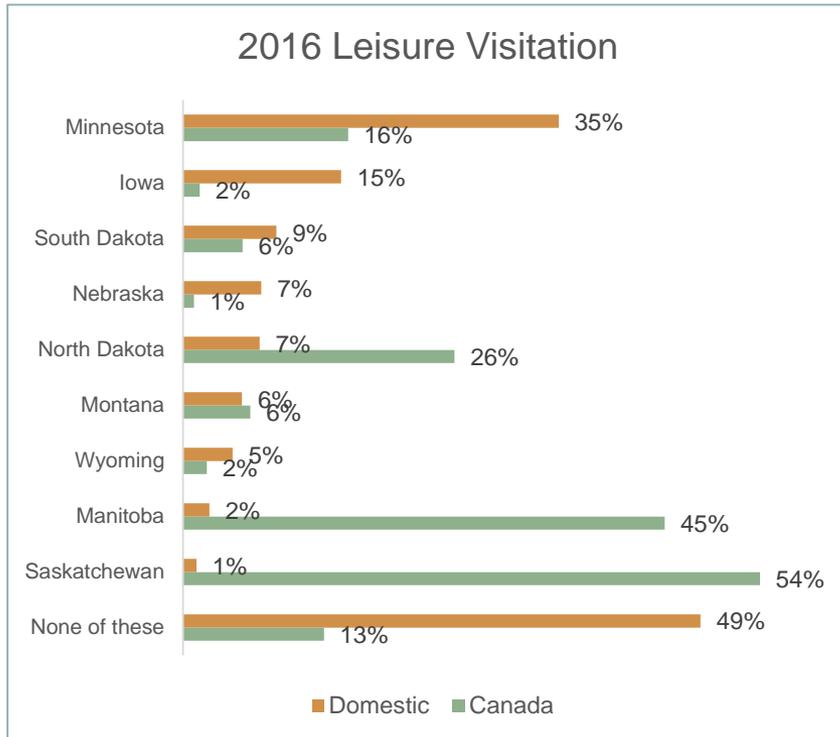
Competitive Familiarity

- There is not a lot of familiarity among domestic consumers with North Dakota, or most of the nearby competitors, in terms of what they offer as a leisure destination.
- Canadian visitors have more familiarity with the leisure product in their provinces and in neighboring states.



Competitive Position

- North Dakota is in a difficult position, especially among domestic visitors. Among the nearby competitive set, it is one of the least preferred destinations for leisure travel. However, it has slightly higher visitation from the target markets than other competitors. At the same time, the markets interviewed are targets of North Dakota and may not be targets of the destinations with lower visitation from these markets.



North Dakota Image

- Interestingly, although Canadians have more familiarity and past experience with North Dakota, domestic markets have a better perception of the state for a number of attributes.
- However, when evaluating destinations on a 5-point scale, a position of strength would be considered for those attributes rated 3.75 or higher. With very few attributes meeting this mark, North Dakota is considered to have a weak image.

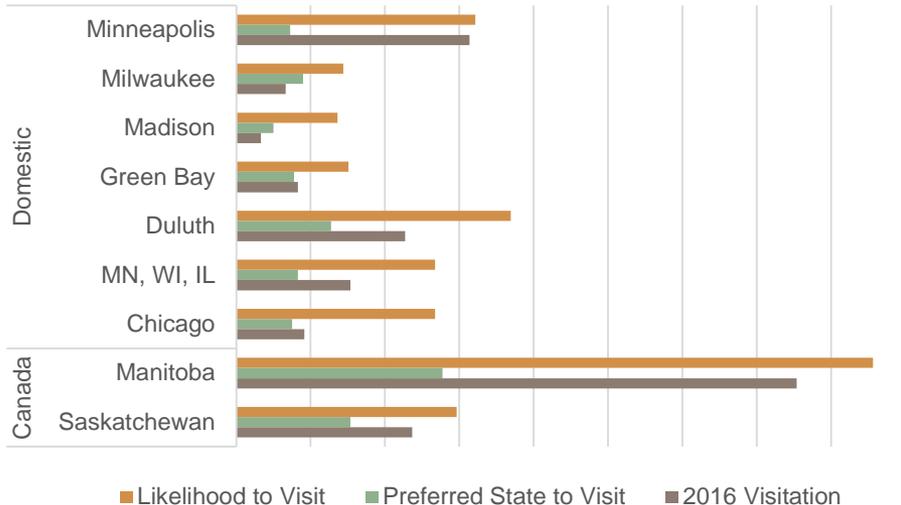
	Domestic	Canada	Diff
Has beautiful natural scenery	3.9	3.7	-0.2
Offers lots of outdoor activities such as hiking, fishing and hunting	3.9	3.6	-0.2
Offers good opportunities for wildlife viewing	3.8	3.5	-0.4
Is a good place to relax in peace and quiet	3.8	3.6	-0.1
Offers great camping and RVing	3.6	3.5	-0.2
Has interesting small towns/rural areas	3.6	3.6	0.0
Is rich with history	3.5	3.4	-0.1
Is a great place for winter sports, including snowmobiling	3.5	3.3	-0.2
Is not too far away for a vacation	3.5	4.0	0.4
Is a good value for the money	3.5	3.4	-0.1
Has interesting historical sites and museums	3.5	3.4	-0.1
Is a place to enjoy western culture	3.5	3.4	-0.1
Is a good place for family vacations	3.4	3.6	0.1
Is growing	3.3	3.4	0.1
Is a fun place to visit	3.3	3.5	0.2
Is a good place to raise a family	3.3	3.4	0.1
Has quality hotel and resort accommodations	3.3	3.6	0.3
Has lots to see and do	3.3	3.4	0.1
Has unique, local restaurants	3.3	3.3	0.1
Is a good place for cultural activities	3.2	3.1	-0.1
Has interesting cities	3.1	3.3	0.2
Is an exciting place to visit	3.1	3.2	0.1
Appeals to the interests of everyone in my travel party	3.1	3.4	0.3
Has a good business environment	3.1	3.2	0.1
Is a good place for a meeting or convention	2.9	3.2	0.3
Is a great place for entertainment, theater and the arts, live music	2.9	3.1	0.2
Is a great place for shopping	2.8	3.7	0.8
Is a place for which I often notice advertising	2.8	3.0	0.3

Market Familiarity

- Among the individual target markets, Minneapolis and Duluth have the most past experience, interest and familiarity with North Dakota of any of the domestic markets.
- Among the Canadian provinces, Saskatchewan is similar to many of the domestic markets in terms of interest and familiarity. The more proximate Manitoba is the most familiar and likely to visit. In 2016, more than a third of consumers from the province visited North Dakota.

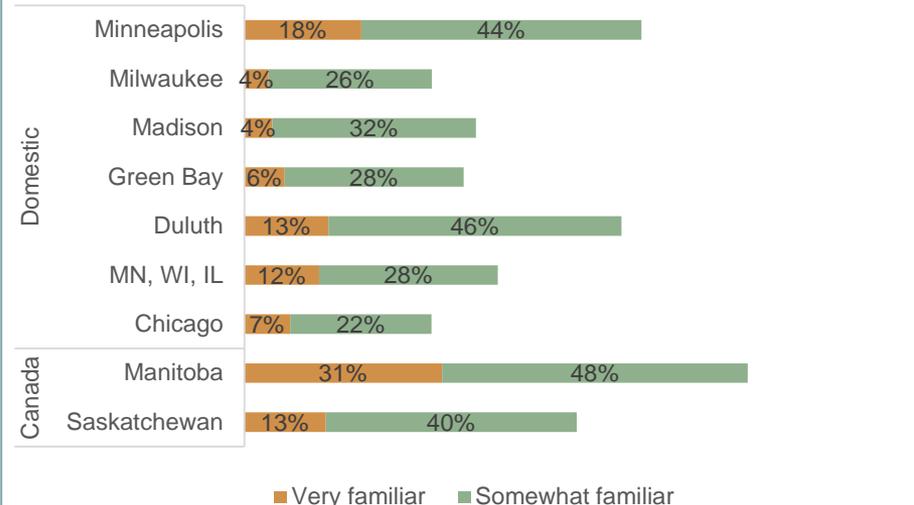
North Dakota Market Assessment

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%



North Dakota Familiarity by Market

0% 20% 40% 60% 80% 100%



Market Image

- An Index makes it easier to see where markets are performing above or below average. Average is 100, 110 is 10% above average and 90 is 10% below average.
- Interestingly, among the domestic markets, it is not the markets with the most familiarity that have the best image of the state. Green Bay and other smaller Midwest markets are quite favorable about North Dakota although they are less familiar.

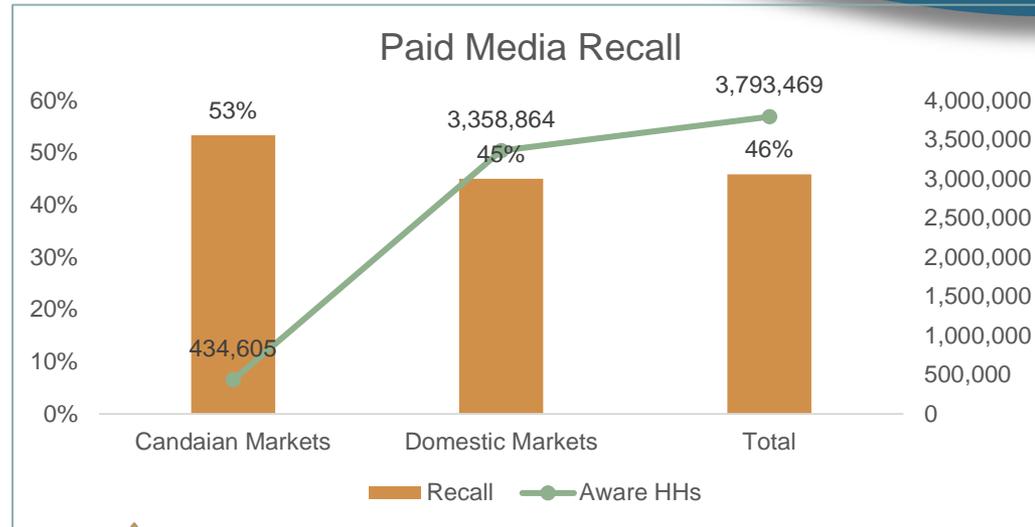
Performance Key	Above Average			Average			Below Average		
	Minneapolis	Milwaukee	Madison	Green Bay	Duluth	MN, WI, IL	Chicago	Manitoba	Saskatchewan
Has beautiful natural scenery	97	102	100	104	100	102	102	94	96
Offers lots of outdoor activities	99	101	101	102	100	103	100	94	95
Offers good opportunities for wildlife viewing	99	102	100	104	102	104	101	90	93
Is a good place to relax in peace and quiet	99	99	99	102	100	103	100	98	96
Offers great camping and RVing	99	102	100	102	102	102	100	96	97
Has interesting small towns/rural areas	97	101	97	102	102	102	101	100	99
Is not too far away for a vacation	108	94	95	94	111	100	93	115	105
Is rich with history	98	102	96	102	103	103	100	96	98
Is a great place for winter sport	100	98	100	99	99	102	102	96	95
Is a good value for the money	102	100	95	100	101	100	100	102	92
Has interesting historical sites and museums	97	100	97	101	102	103	101	95	98
Is a place to enjoy western culture	96	101	97	103	96	103	102	95	100
Is a good place for family vacations	95	100	94	102	103	102	101	105	101
Has quality hotel and resort accommodations	95	100	95	101	104	101	100	112	104
Is a fun place to visit	93	101	92	101	101	101	102	109	102
Is growing	103	99	95	101	105	102	97	105	98
Is a good place to raise a family	100	97	91	100	100	102	100	103	101
Has lots to see and do	92	103	94	103	102	101	103	104	102
Has unique, local restaurants	94	100	94	99	103	102	103	104	99
Is a good place for cultural activities	97	101	97	101	101	101	102	98	99
Has interesting cities	93	100	91	100	102	102	104	106	102
Is an exciting place to visit	92	100	94	101	102	102	104	103	101
Appeals to the interests of everyone in my travel party	94	99	89	99	101	101	102	112	103
Has a good business environment	98	99	92	99	103	102	100	106	101
Is a great place for shopping	89	97	88	98	97	98	102	131	116
Is a good place for a meeting or convention	97	99	90	98	101	101	100	110	105
Is a great place for entertainment	94	101	89	100	98	99	104	108	105
Is a place for which I often notice advertising	105	101	93	101	101	95	96	115	101

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MARKETING AWARENESS

Overall Awareness

- Overall, the campaign reached nearly 3.8 million households in the target markets. Although the percentage of awareness is higher in the Canadian markets, there are far fewer households here. So most of the recall comes from domestic markets.
- SMARInsights has established a number of benchmarks for DMO marketing based on the evaluation of hundreds of campaigns. Of destination campaigns attempting to reach targeted markets such as the North Dakota effort, the average cost per aware household is \$0.67. Overall, the paid media cost per aware household is higher than this average, an indication that there could be more efficiency in the media buy.
- Given 2016 was the rollout of a new campaign, it would be anticipated that future placements would have improved efficiency as the advertising has a chance to develop “wear in” among the target audience.

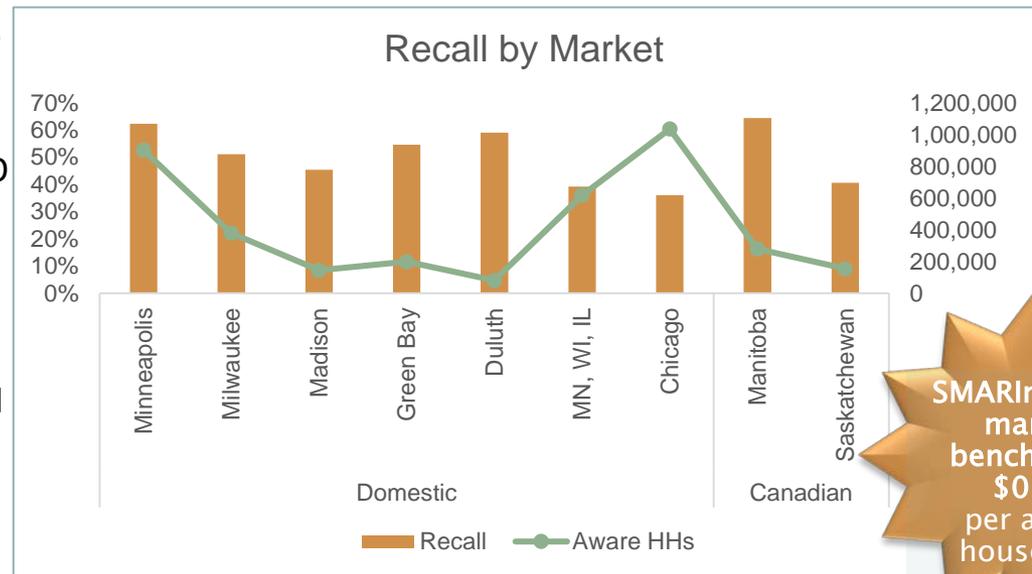


SMARInsights' market benchmark: \$0.67 per aware household

	Canadian Markets	Domestic Markets	Total
Targeted HHs	815,281	7,458,445	8,273,726
Awareness	53%	45%	46%
Aware HHs	434,605	3,358,864	3,793,469
Media Spending	\$504,533	\$2,494,791	\$2,999,325
Cost per Aware HH	\$1.16	\$0.74	\$0.79

Market Awareness

- Among the individual spot markets, recall is highest in Minneapolis and Manitoba, the nearby markets that are the most familiar with North Dakota. However, given the population of Chicago, much lower recall of the advertising generates a significant number of aware households.
- Using the SMARInsights' cost per aware household benchmark, the media placements in Chicago are the most efficient, coming in well below the DMO average.
- The cost per aware household can be a guide as to where resources can be shifted. It is likely in many of the markets the investment could be scaled back while retaining similar levels of recall.

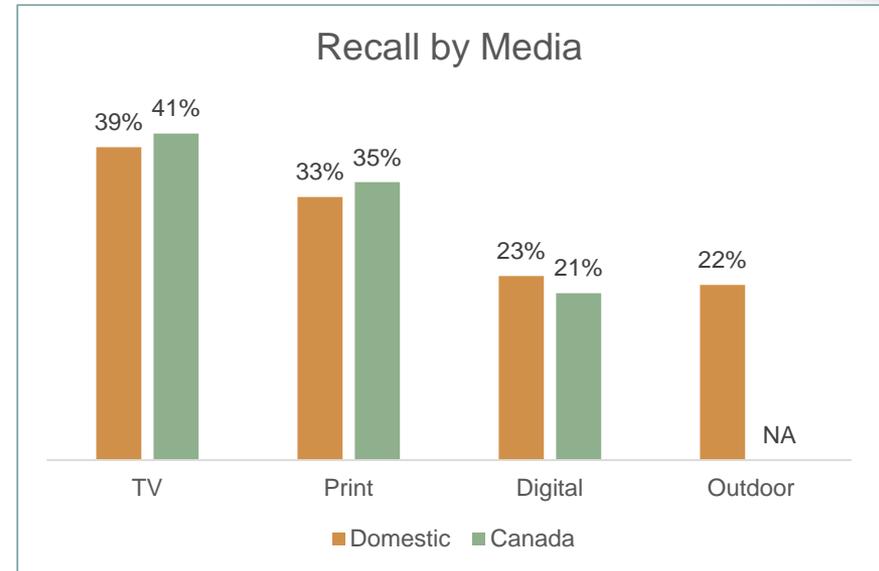


	Minneapolis	Milwaukee	Madison	Green Bay	Duluth	MN, WI, IL	Chicago	Manitoba	Saskatchewan
Targeted HHs	1,446,300	743,431	319,409	363,598	136,435	1,574,932	2,874,340	434,471	380,810
Recall	62%	51%	45%	55%	59%	39%	36%	64%	41%
Aware HHs	902,147	379,756	145,105	198,418	80,501	617,556	1,035,380	279,752	154,852
Media Spending	\$812,838	\$402,334	\$144,763	\$143,194	\$76,777	\$530,312	\$384,574	\$335,403	\$169,130
Cost per aware HH	\$0.90	\$1.06	\$1.00	\$0.72	\$0.95	\$0.86	\$0.37	\$1.20	\$1.09

SMARInsights' market benchmark: \$0.67 per aware household

Awareness by Media

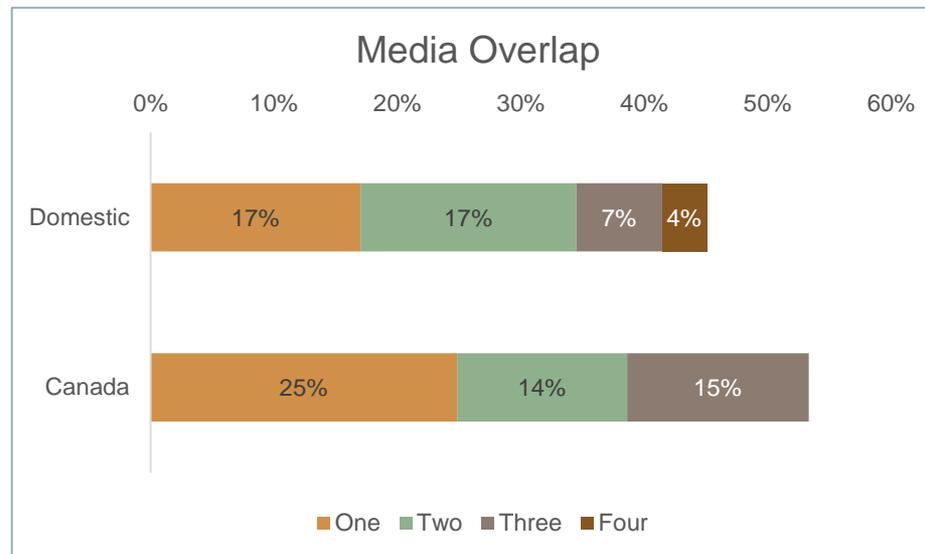
- Among the domestic markets, recall of individual media followed the level of investment. Although TV had the highest level of recall in the domestic markets, this did not include Chicago so the cost per aware household was higher than other media. The same is true for outdoor, which had a similar level of recall to digital but was only placed in two markets.
- SMARInsights has seen a shift in DMO allocations in recent years, and while TV receives the bulk of investment by most destinations, digital budgets have expanded dramatically, resulting in high levels of digital recall. In order to push digital recall higher, the level of investment will likely need to be increased.
- The population in the Canadian markets is so small that it is difficult to efficiently place media here, with costs per aware household for digital and print more than double that of the domestic markets.



	Domestic				Canada		
	TV	Print	Digital	Outdoor	TV	Print	Digital
Targeted HHs	4,584,106	7,458,445	7,458,445	2,454,782	815,281	815,281	815,281
Recall	39%	33%	23%	22%	41%	35%	21%
Aware HHs	1,794,334	2,454,782	1,717,464	537,547	333,034	283,379	170,249
Media Spending	\$ 858,863	\$ 800,982	\$ 601,412	\$ 233,535	\$ 154,907	\$ 199,274	\$ 150,353
Cost per Aware HH	\$0.48	\$0.33	\$0.35	\$0.43	\$0.47	\$0.70	\$0.88

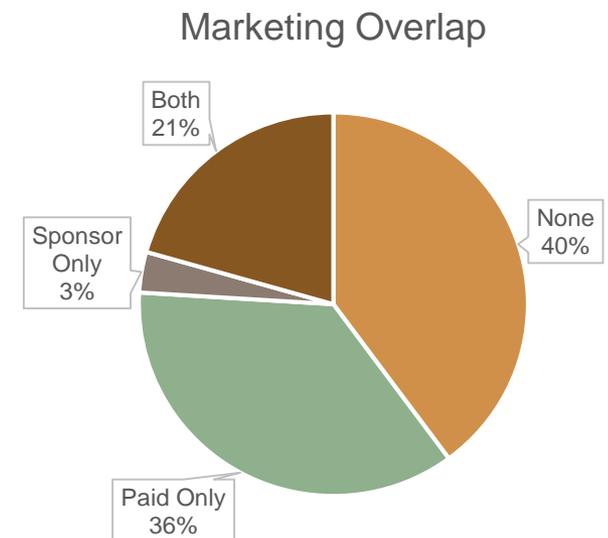
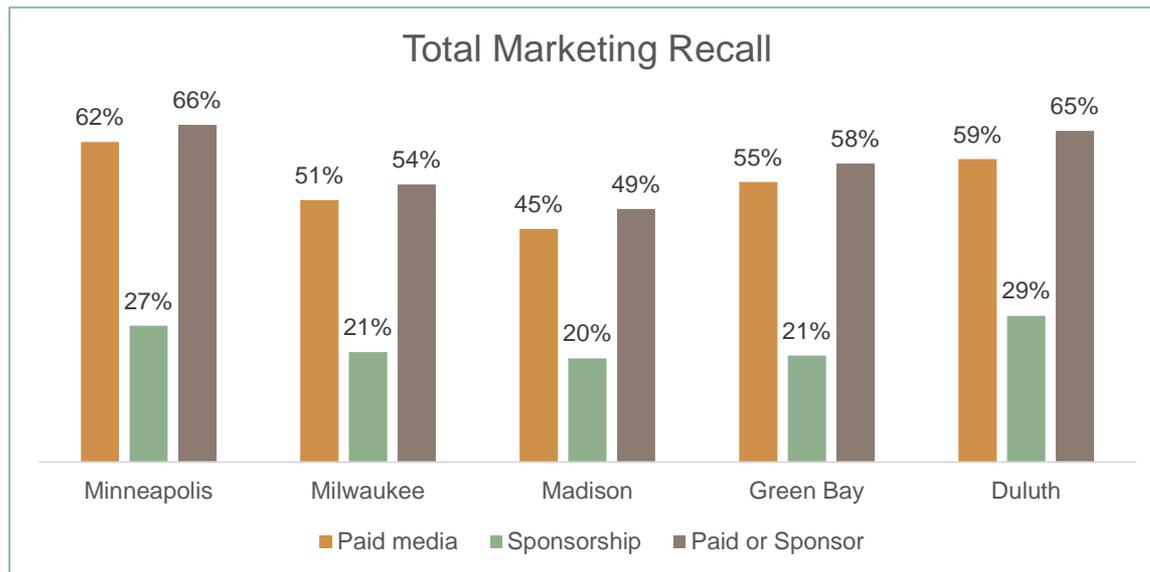
Media Overlap

- By being exposed to multiple messages, consumers are more likely to bring a destination into their consideration set and ultimately travel to the state.
- Of those exposed to the campaign, more than half saw more than one component of the paid media. Even in the Canadian markets where there was far less investment, there was considerable overlap among multiple parts of the campaign.



Total Marketing Recall

- In addition to traditional paid media, the North Dakota Tourism Division invested in paid sponsorships with Major League Baseball teams. The addition of sponsorships not only pushes recall of North Dakota marketing slightly higher, but it also generates additional overlap. Just as overlap of media can influence interest and travel, the more messaging consumers see, often the more a destination rises in their consideration set.
- So though paid media dominates North Dakota awareness, there is considerable overlap with the sponsorship program. Of the SMARInsights clients measuring additional marketing beyond paid media, there is an average overlap of 21% between paid and other sources, putting the North Dakota overlap on par with other DMOs.



Total Marketing Recall

- While the sponsorship marketing pushed recall slightly higher, it did so with additional investment. Therefore the cost per aware household in the markets able to be exposed to the sponsorship increased. Overall, the cost to reach an aware household for the entirety of the marketing campaign was \$0.81, slightly higher than the SMARInsights’ benchmark of \$0.67 for spot market campaigns. However, there was significant media overlap – both among the paid media placements as well as between paid media and sponsorships.

	Minneapolis	Milwaukee	Madison	Green Bay	Duluth
Targeted HHs	1,446,300	743,431	319,409	363,598	136,435
Total Marketing Recall	66%	54%	49%	58%	65%
Aware HHs	949,880	402,022	157,492	211,511	88,059
Media Spending	\$922,349	\$428,132	\$155,847	\$155,812	\$89,766
Cost per Aware HH	\$0.97	\$1.06	\$0.99	\$0.74	\$1.02

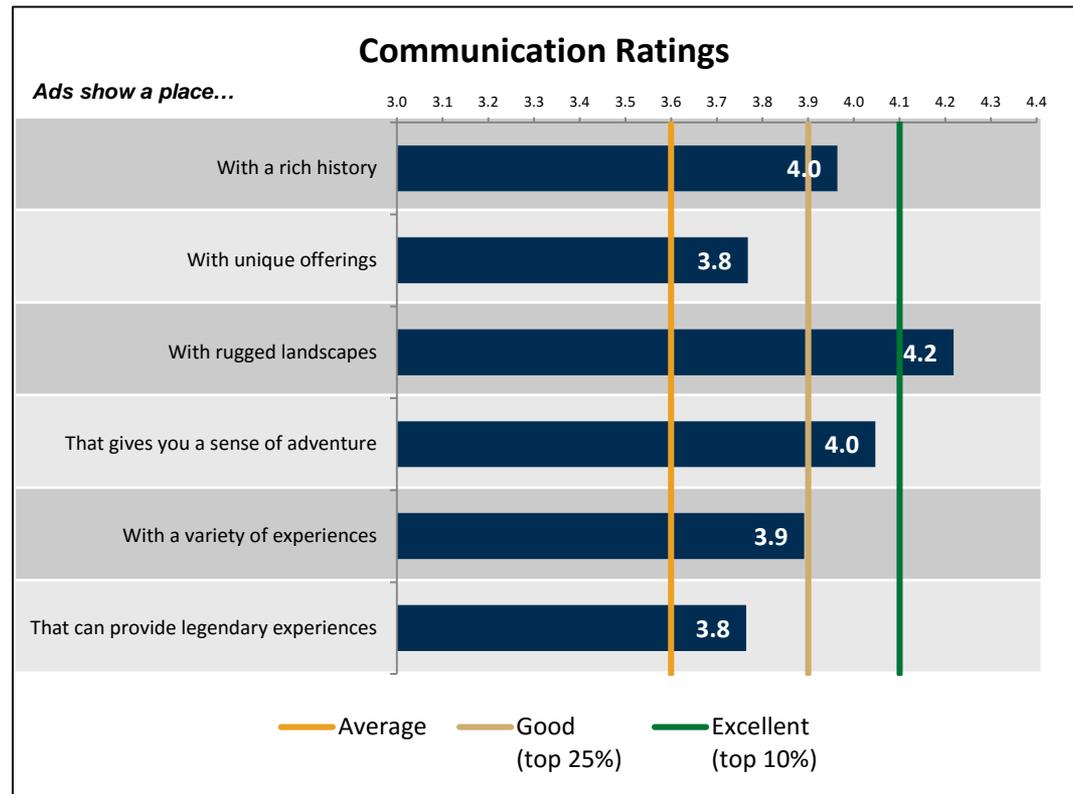
	Paid Media Only	Paid Media & Sponsorships
Targeted HHs	8,273,726	8,273,726
Total Marketing Recall	46%	47%
Aware HHs	3,793,469	\$3,896,507
Media Spending	\$2,999,325	\$3,171,325
Cost per Aware HH	\$0.79	\$0.81

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CREATIVE REVIEW

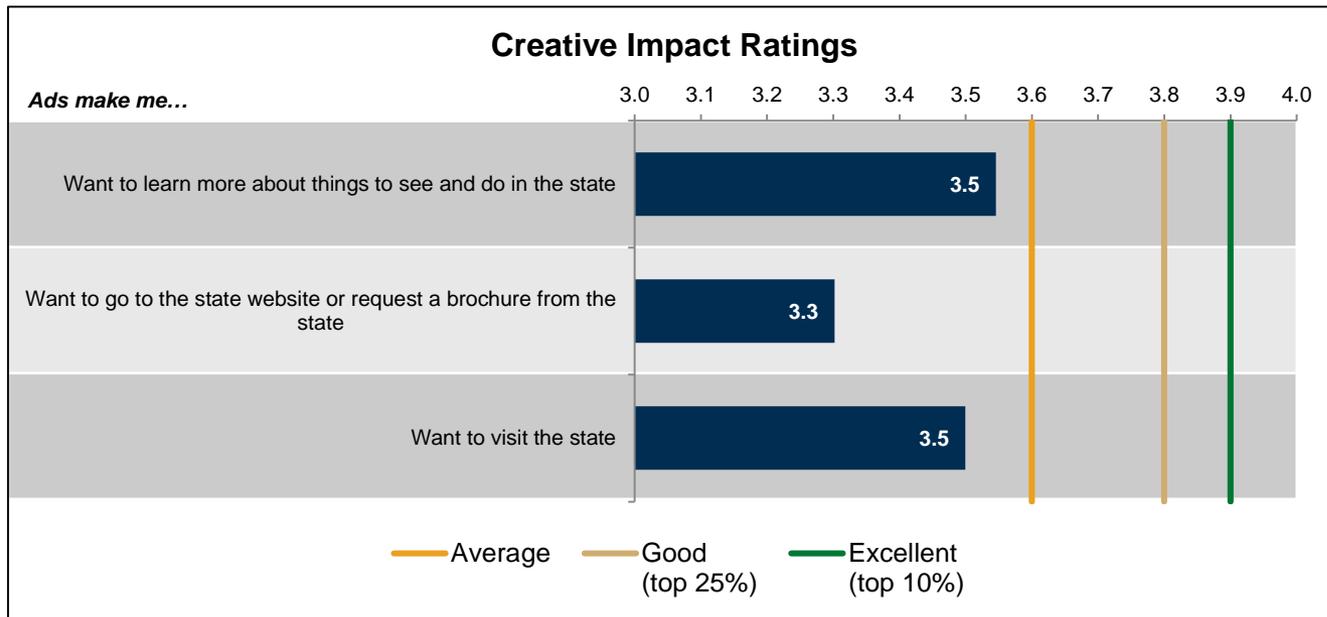
Communication Attributes

- SMARInsights has developed a set of creative benchmarks based on the evaluation of hundreds of DMO campaigns. These are goal ratings that campaigns should attempt to reach. These ratings vary depending on what they are attempting to do – communicate a message or spur a consumer to action.
- SMARInsights typically sees destinations with spectacular product receiving ratings above a 4.0. With many attributes in the top 25% of all DMO campaigns rated, the campaign is able to clearly and uniquely communicate to consumers.



Impact Attributes

- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult than just communicating a desired message. While the campaign clearly communicates the desired messages, it is not as inspiring in getting consumers to take action.
- With all of the impact attributes below average, it is possible consumers are drawn to the celebrity but not motivated by the product featured. It could be an indication that though the creative is communicating what NDTD has identified as the campaign’s messaging, consumers don’t find that message, or possibly product, motivating.



Familiarity with Spokesperson

- The newly developed creative features actor and North Dakota native Josh Duhamel from the Transformer films and the TV series “Las Vegas.” About half of consumers in the target markets were familiar with the actor, with Canadian markets slightly more familiar than domestic markets. Those who were aware of the advertising were more likely to know who he was as well.
- Although overall the impact ratings are lower than the industry benchmarks, those who know Mr. Duhamel give the ads much higher ratings for making them want to learn more and visit North Dakota.
- Given impact ratings are difficult to move, these differences are significant and point to Mr. Duhamel being a motivating spokesperson for the state.

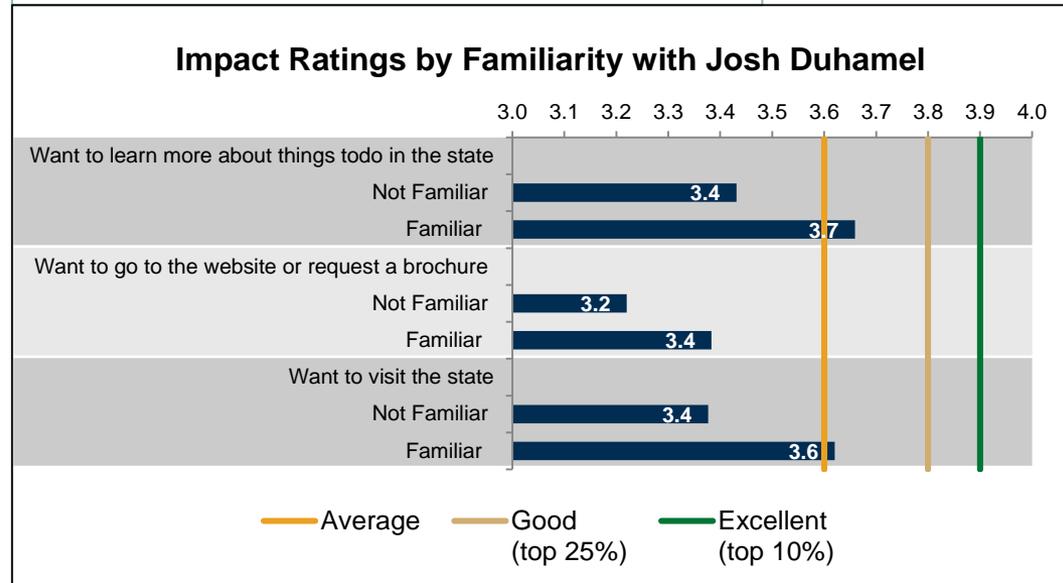
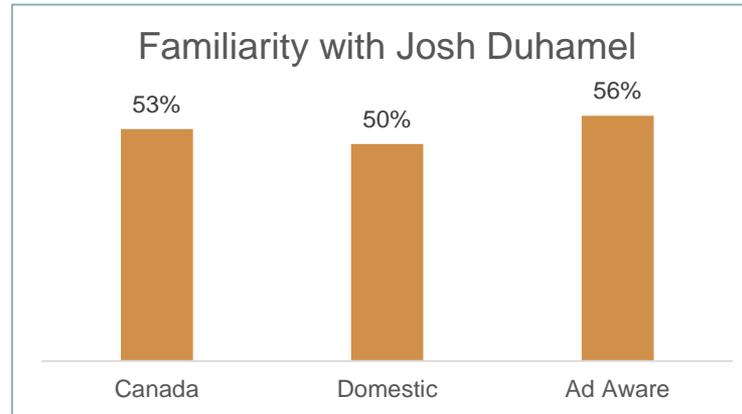
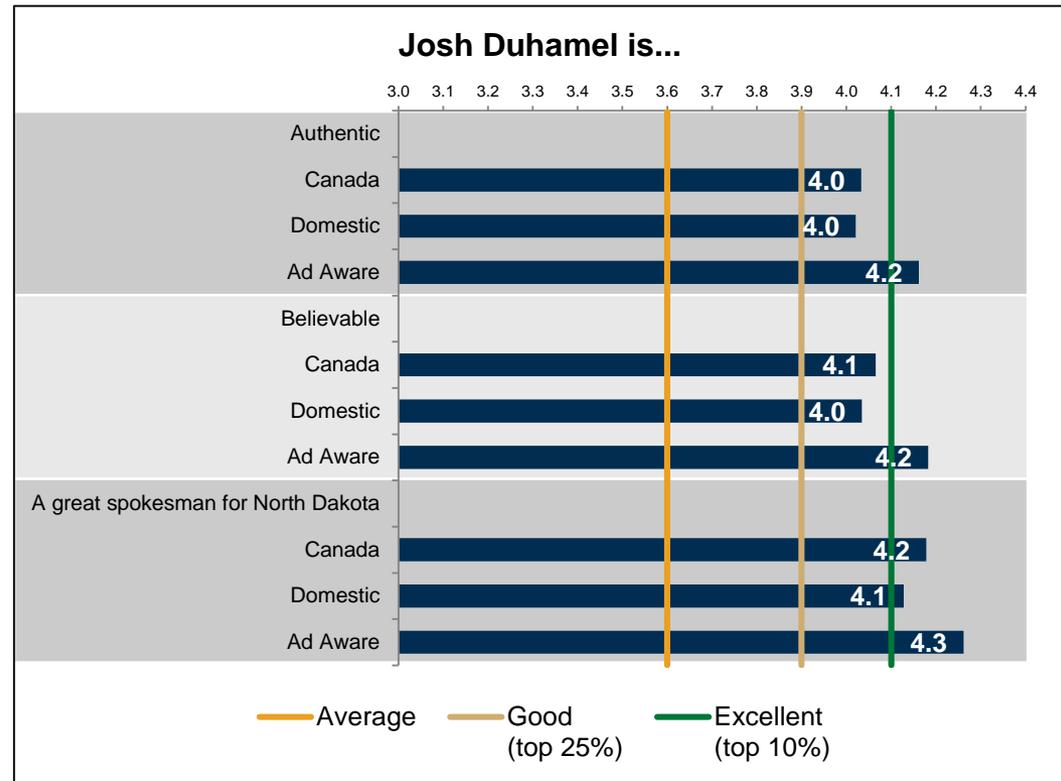


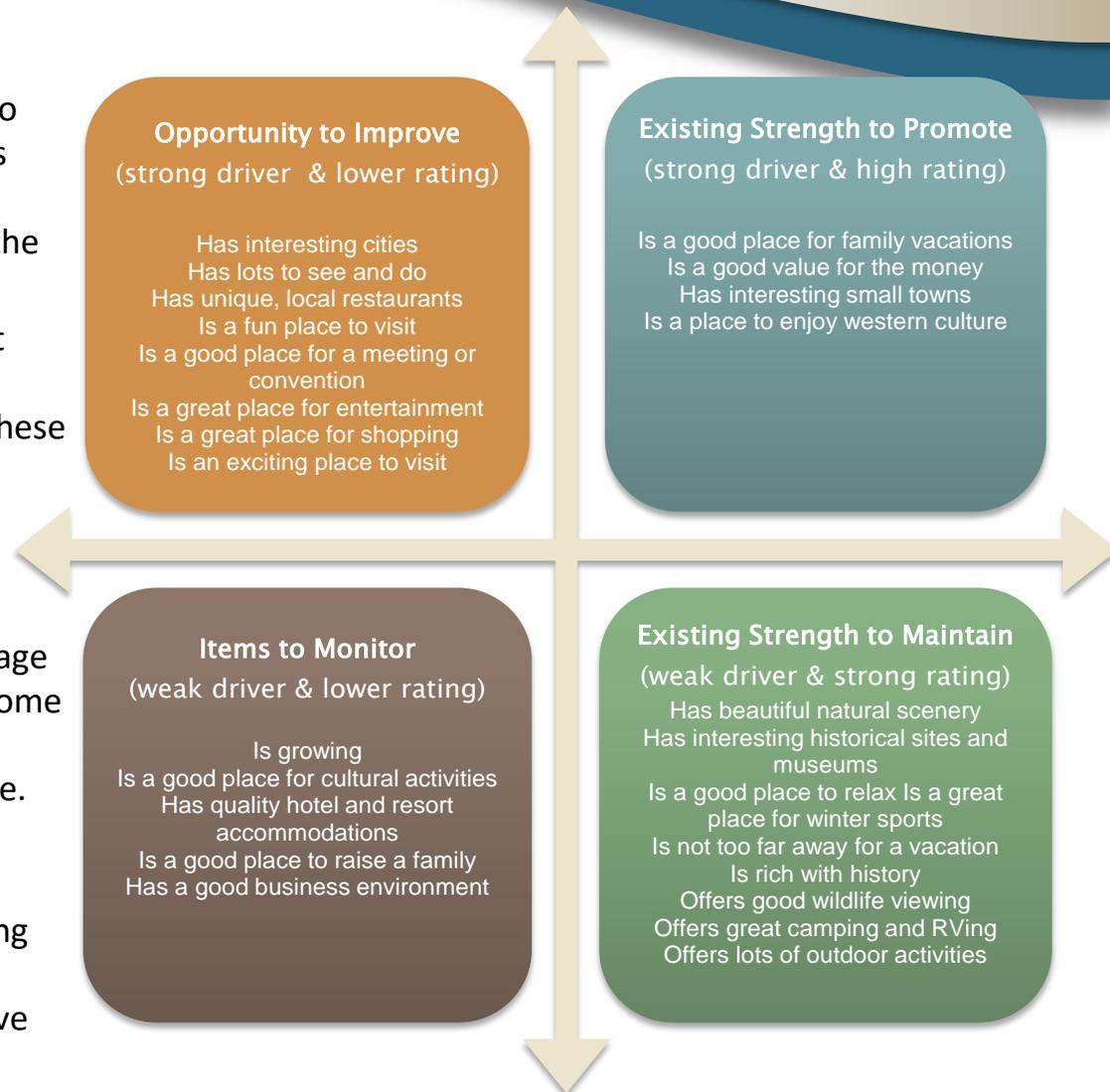
Image of Spokesperson

- DMOs have often employed celebrities as spokespeople for their destination. While this often captures consumers' attention, it can also be a danger if the celebrity ends up embroiled in a scandal or if the image of the spokesperson doesn't fit the image of the destination.
- Not only do consumers consider Mr. Duhamel a great spokesperson for North Dakota, but they also are positive about his believability and authenticity.
- The positive ratings by those aware of Mr. Duhamel indicate this could be a campaign with legs in that it could be used for a number of years to build awareness and the image of the state.



Creative Messaging

- By understanding what motivates visitors to consider North Dakota and how the state is currently performing, messaging can both appeal to what is motivating and improve the image of the state.
- Those activities in the upper right quadrant have both high correlation to interest in visiting and receive strong image ratings. These Strengths to Promote are centered around North Dakota being a place families can connect affordably.
- The lower right quadrant are attributes on which North Dakota rates better than average but are not considered drivers. However, some like wildlife, winter sports and outdoor activities are motivating to a niche audience.
- The upper left quadrant is motivating, but consumers don't have as strong a view of North Dakota for these attributes. Improving the state's image for these attributes and featuring them in the creative could improve interest in visiting.



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IMPACT OF THE ADVERTISING

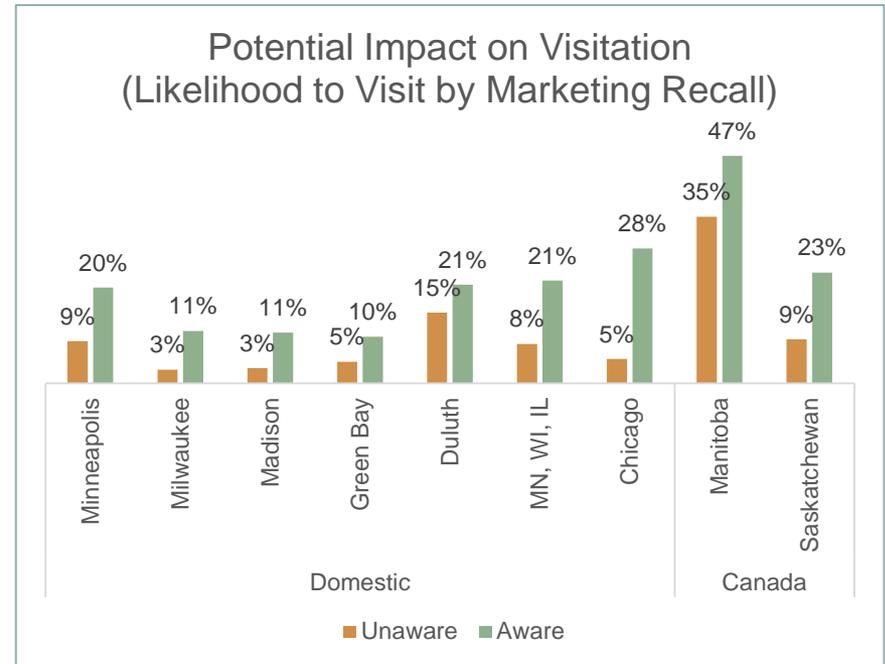
Impact on Image

- While the goal of destination marketing is to generate additional visitation, there are other ways in which the advertising can have influence. This includes improving the image of the place.
- When destinations have a strong brand and associated product, the marketing has little influence on image. For those attributes where North Dakota is receiving stronger ratings – 3.5 or higher – it is difficult for the marketing to have much influence.
- But for those attributes for which the state has a less defined image, the paid media more strongly influences the image of the state. Ads can stimulate consumers to research the destination, so recall of the advertising can impact attributes not addressed directly in the creative.
- The items in bold were those attributes that were considered Opportunities to Improve with the messaging. These are considered drivers to travel to North Dakota but where the state falls short. Continued improvements in these ratings could move additional visitation.

	Unaware	Aware	Diff.
Appeals to the interests of everyone in my travel party	2.8	3.4	0.6
Is an exciting place to visit	2.8	3.4	0.5
Is a fun place to visit	3.1	3.6	0.5
Is a great place for entertainment	2.6	3.1	0.5
Has interesting cities	2.9	3.4	0.5
Is a good place for cultural activities	2.9	3.4	0.5
Is a good place for family vacations	3.2	3.7	0.5
Is a great place for shopping	2.7	3.2	0.5
Is growing	3.1	3.5	0.4
Has unique, local restaurants	3.0	3.5	0.4
Is not too far away for a vacation	3.4	3.8	0.4
Has quality hotel and resort accommodations	3.1	3.5	0.4
Has lots to see and do	3.1	3.5	0.4
Is a good place for a meeting or convention	2.7	3.1	0.4
Is a place to enjoy western culture	3.2	3.6	0.4
Is a good value for the money	3.3	3.7	0.4
Has interesting historical sites and museums	3.3	3.7	0.4
Has interesting small towns/rural areas	3.4	3.8	0.4
Is a good place to raise a family	3.1	3.5	0.4
Has a good business environment	2.9	3.3	0.4
Is rich with history	3.3	3.7	0.4
Is a good place to relax in peace and quiet	3.6	3.9	0.4
Has beautiful natural scenery	3.7	4.0	0.3
Is a great place for winter sports	3.3	3.7	0.3
Offers great camping and RVing	3.4	3.8	0.3
Offers good opportunities for wildlife viewing	3.6	3.9	0.3
Offers lots of outdoor activities	3.7	4.0	0.3

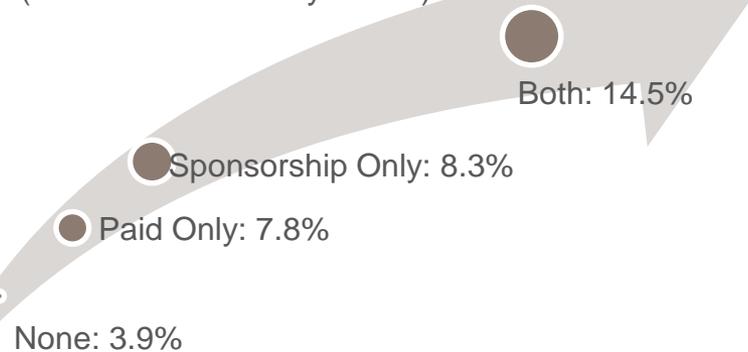
Impact on Likelihood to Visit

- The advertising generated travel in 2016, but it can also plant the seeds for future travel. In doing so, it can impact the likelihood to visit sometime in the future.
- Certainly recall of the paid media encourages visitation, but when combined with paid sponsorships, interest increases considerably. Although those aware of sponsorship only are slightly more likely to consider a trip, only a very small audience is aware of these without paid media.
- Future impacts across all markets look strong, with the opportunity for significant impact from other Midwest markets, including Chicago.



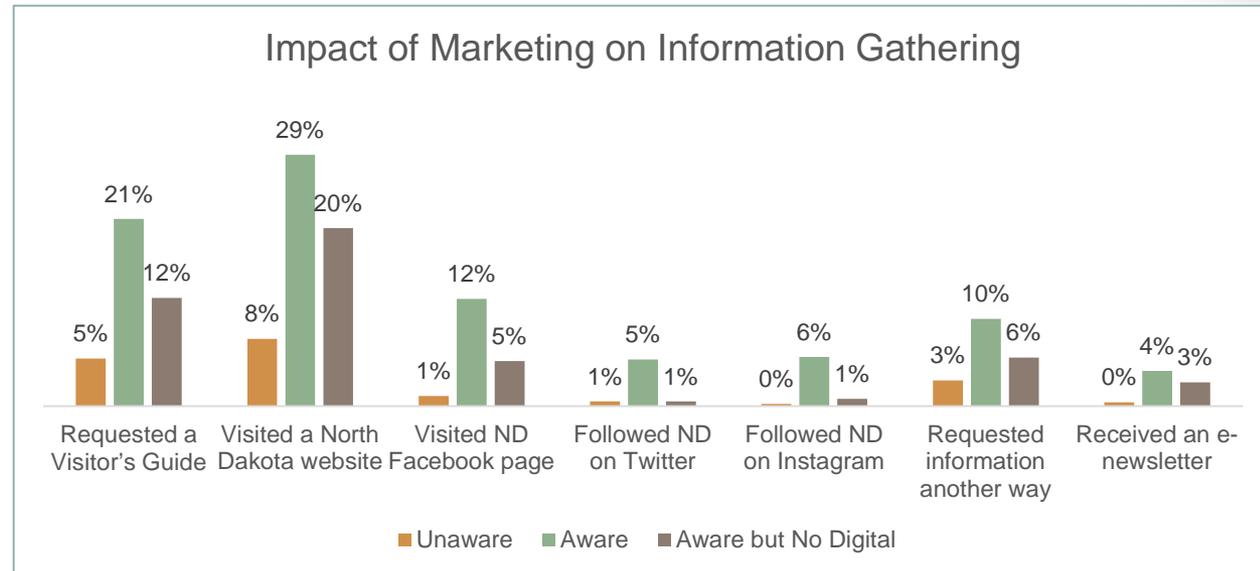
*Likelihood defined as 100% of households “already planning a trip” + 80% “very likely” to visit + 20% “somewhat likely” to visit

Impact of Marketing Overlap (Likelihood to Visit by Recall)



Impact on Information Gathering

- In addition to building the image of and interest in the state, destination marketing can spur consumers to gather information.
- Given DMOs are shifting more resources into retargeting, this can be a bit deceiving. The extreme differences in information gathering could be a result of a digital ad being delivered after visiting the state's website or Facebook page. This is likely the case given the drop in information gathering by those with recall of other media besides digital.
- Either way, those with exposure were still more engaged with North Dakota's digital and print collateral.



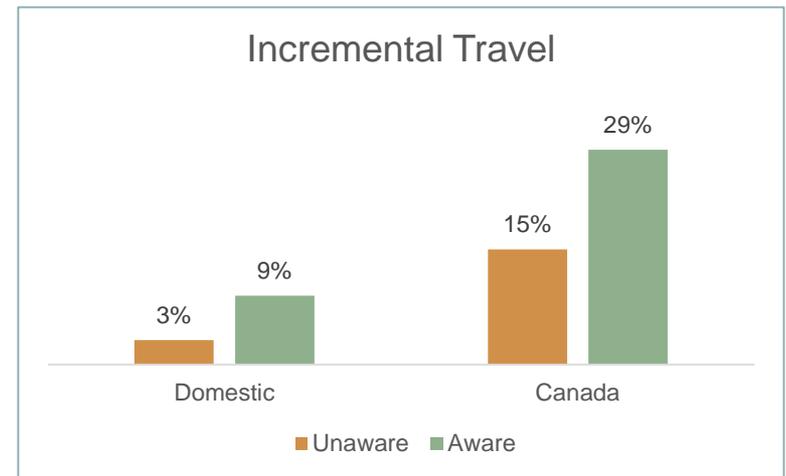
Impact on Trips

- In addition to influencing image and interest in visiting and information gathering, awareness of the marketing can also influence what consumers do on their trips.
- Those aware of the marketing took slightly longer trips, did more and spent more money. Those aware of the ads more often brought children under 18 on the trip as well.

	Unaware	Aware
Number of Nights	2.2	2.6
People in Party	2.7	2.9
Kids on Trip	24%	36%
Number of Activities	2.6	4.8
Trip Spending	\$631	\$956

Incremental Travel

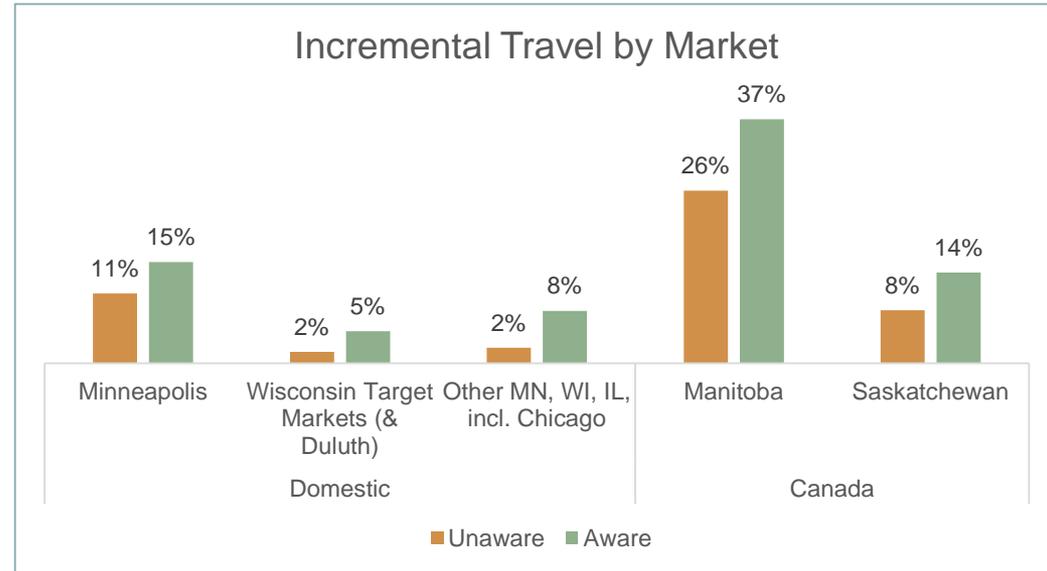
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to North Dakota even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.
- Based on the rates of aware and unaware travel, the North Dakota summer campaign influenced nearly 265,000 trips in 2016.
- Although the Canadian markets make up only 10% of the targeted households, they accounted for nearly a quarter of the incremental trips.



	Domestic	Canada	Total
Aware HHs	3,461,902	434,605	3,896,507
Incremental Travel	6%	13%	7%
Incremental Trips	206,198	57,818	264,017

Impact of the Advertising on Travel

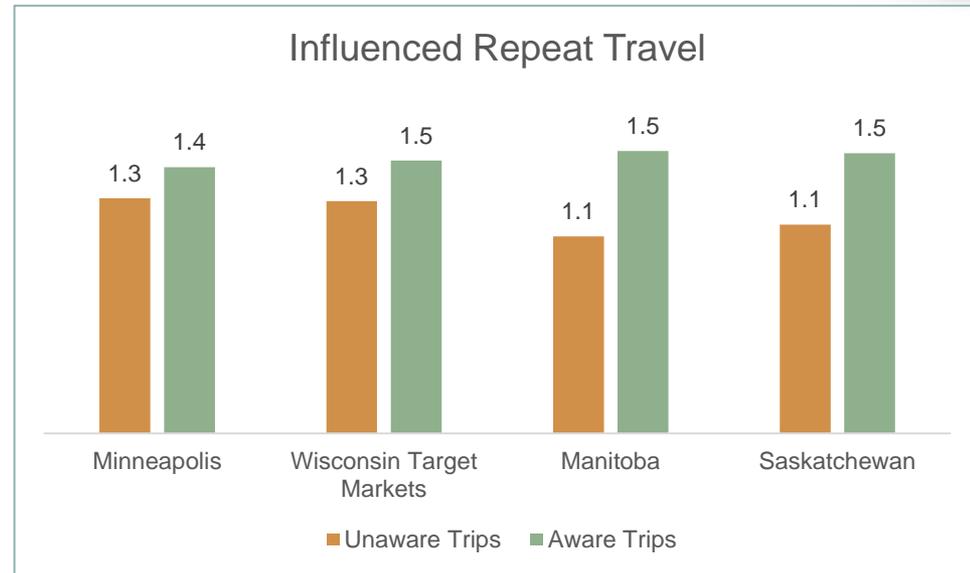
- Given the level of travel from the targeted markets, some of them had to be combined to generate a statistically reliable level of incremental travel.
- SMARInsights often finds that it is difficult to generate influence from markets that have a high propensity to visit even without marketing. However, the biggest increment is from the province of Manitoba, which has the highest rate of travel to the state, even by those unaware. However, the population here and in Saskatchewan is so small that even such good performance generates very few trips.
- Minneapolis has the highest rate of domestic visitation but still delivers a strong increment.
- The most incremental trips are from other parts of the Midwest, namely due to the inclusion of Chicago and the population of the city.



	Minneapolis	Wisconsin Target Markets (& Duluth)	Other MN, WI, IL, incl. Chicago	Manitoba	Saskatchewan
Aware HHs	949,880	859,085	1,652,937	279,752	154,852
Increment	6%	4%	7%	14%	7%
Incremental Trips	58,360	34,979	120,057	39,135	11,485

Impact on Repeat Travel

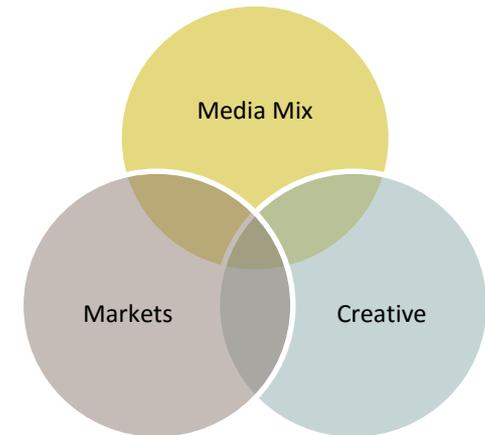
- In addition to generating incremental travel, destination marketing can also influence repeat travel. By evaluating the number of trips by aware versus unaware, the marketing influences additional trips in all the target markets except Chicago and the wider Midwest. Given these are the most distant markets, it is unlikely they would have repeat trips.
- Overall, the marketing influences more than 90,000 repeat trips to the state, more than half of those from Manitoba.



Repeat Trips	Minneapolis	Wisconsin Target Markets (& Duluth)	Manitoba	Saskatchewan
Aware HHs	949,880	859,085	279,752	154,852
Travel by Aware	15%	5%	37%	14%
Aware Traveling HH	145,585	41,870	103,445	21,332
Influenced repeat trips	0.2	0.2	0.5	0.4
Total repeat trips	24,734	9,226	47,975	8,278

Total Influenced Travel

- Overall, the campaign generated more than 350,000 influenced trips in 2106. The success of the effort is attributable to the primary components of destination marketing:
 - **Markets:** Although there are opportunities for the shifting of resources, expanding the footprint of the campaign beyond smaller targeted spot markets was successful.
 - **Media Mix:** Although the overall cost per aware household was higher than the industry average, this was primarily attributable to the overlap the campaign was able to generate.
 - **Creative:** The creative performs far above average for communicating North Dakota Tourism Division’s desired messages, likely with the celebrity inclusion a draw for consumers.



	Incremental Trips	Repeat Trips	Total Influenced Trips
Minneapolis	58,360	24,734	83,095
Wisconsin Target Markets (& Duluth)	34,979	9,226	44,205
Other MN, WI, IL, incl. Chicago	120,057	0	120,057
Manitoba	39,135	47,975	87,110
Saskatchewan	11,485	8,278	19,763
Total Influence	264,017	90,213	354,230

2016 Advertising Effectiveness & ROI

RETURN ON INVESTMENT

Return on Investment

- Given the level of spending from the target markets, the campaign generated more than \$328 million in influenced visitor spending through incremental and repeat trips.
- The Canadian markets had significantly less investment, so they have the highest return.
- The nearby market of Minneapolis spends significantly less on their trips. Given proximity, the market has high rates of visitation to North Dakota and continued targeting would likely generate additional influence. But it is important to realize that the value of the visitor is nearly half that of a visitor from more distant parts of the Midwest.
- The average ROI SMARInsights sees for state DMO campaigns is \$129. Overall, the campaign is performing slightly below this mark. But the markets with significantly lower return could likely have far less investment while generating similar levels of recall and influence.

	Minneapolis	Wisconsin Target Markets (& Duluth)	Other MN, WI, IL, incl. Chicago	Manitoba	Saskatchewan	Total Influence
Total Influenced Trips	83,095	44,205	120,057	87,110	19,763	354,230
Visitor Spending	\$661	\$968	\$1,113	\$876	\$1,045	\$927
Influenced Spending	\$54,896,966	\$42,776,527	\$133,608,752	\$76,345,814	\$20,646,657	\$328,274,715
Marketing Investment	\$922,349	\$829,557	\$914,886	\$335,403	\$169,130	\$3,171,325
ROI	\$60	\$52	\$146	\$228	\$122	\$104

Tax Return on Investment

- Government entities invest in tourism marketing because it is able to generate a positive return on investment. Given the effective tax rate of 5.7% in North Dakota, this results in \$18.7 million in tax revenue to the state. With the marketing investment at nearly \$3.2 million the result is \$5.90 returned to the state for every \$1 spent on paid media and sponsorship.
- The domestic markets return 70% of the tax revenue . But given the level of spending in the domestic markets, the tax ROI here is half that of the Canadian markets.

	Domestic	Canada	Total
Influenced Spending	\$231,282,245	\$96,992,471	\$328,274,716
Taxes Generated	\$13,183,088	\$5,528,571	\$18,711,659
Marketing Investment	\$2,666,792	\$504,533	\$3,171,325
Tax ROI	\$4.94	\$10.96	\$5.90

2016 Advertising Effectiveness & ROI

TRIP SPECIFICS

Trip Specifics by Market

- Although domestic visitors stay longer and do more on their trips, Canadian visitors spend more. However, the difference is attributable to Canadians spending more than three times as domestic visitors on shopping.
- Not only does North Dakota offer a nearby source of goods, but it also has a lower tax rate than Manitoba. So though still considered a leisure visitor because they are traveling more than 50 miles, some Canadian visitors are likely shopping for staples during their trips.

	Canada	Domestic
Number of Nights	2.2	2.7
People in Party	2.9	2.9
Kids on Trip	27%	33%
Number of Activities	2.9	4.7

	Canada	Domestic
Lodging	\$226	\$197
Meals/Food	\$182	\$139
Attractions	\$39	\$74
Shopping	\$333	\$98
Entertainment	\$16	\$45
Recreation	\$20	\$56
Transportation	\$46	\$68
Other	\$31	\$44
Total	\$901	\$731

Canadian Trip Motivation

- Understanding what is driving travel from a market can guide media messages. With Canadian visitors spending so much more than domestic visitors, it is clear their trip is motivated by shopping.
- Knowing this, however, North Dakota tourism could consider ways to deliver messages that encourages visitors motivated by shopping to do more while in the state.

Canadian Visitors	Participate	Motivate	Net Motivation
Shopping	81%	78%	63%
Ate at unique, local restaurants	47%	30%	14%
Scenic drive	29%	33%	9%
Other	8%	89%	7%
Visited historical sites	15%	35%	5%
Camping	7%	66%	5%
Gambling	8%	53%	4%
Visited museums	13%	29%	4%
Hiking or backpacking	7%	47%	3%
Sightseeing tour	10%	33%	3%
Visited a national park	10%	29%	3%
Visited a state park	11%	22%	2%
Attended a festival or event	4%	56%	2%
Visited Native American sites	5%	46%	2%
Golfing	7%	35%	2%
Attended a meeting or convention	2%	80%	2%
Wildlife watching	7%	25%	2%
Bicycling or mountain biking	4%	37%	1%
Attended performing arts (music/theater)	3%	40%	1%
Fishing	3%	30%	1%
Snowmobiling	1%	100%	1%
Motorcycling	1%	53%	0%
Snow skiing or snowboarding	0%	100%	0%
Horseback riding	2%	26%	0%
Boating	1%	33%	0%
None of these	2%	7%	0%
Hunting	0%		0%
Canoeing or kayaking	0%		0%
Visited a farm, ranch or agritourism site	0%		0%
Bird watching	2%	0%	0%

Domestic Trip Motivation

- Alternatively, domestic visitors are motivated to travel to North Dakota for more leisure-oriented activities. There is far more variety in both their participation and motivation of activities on their North Dakota trip.

Domestic Visitors	Participate	Motivate	Net Motivation
Visited a national park	29%	68%	20%
Visited historical sites	27%	49%	13%
Scenic drive	39%	32%	12%
Camping	19%	62%	12%
Shopping	39%	27%	11%
Hiking or backpacking	21%	47%	10%
Visited a state park	29%	33%	10%
Wildlife watching	26%	36%	10%
Ate at unique, local restaurants	36%	25%	9%
Visited Native American sites	18%	38%	7%
Other	7%	91%	6%
Attended a festival or event	15%	35%	5%
Visited museums	23%	22%	5%
Sightseeing tour	19%	24%	5%
Golfing	7%	57%	4%
Gambling	13%	25%	3%
Hunting	8%	41%	3%
Attended a meeting or convention	7%	43%	3%
Canoeing or kayaking	7%	41%	3%
Fishing	14%	16%	2%
Horseback riding	9%	24%	2%
Attended performing arts (music/theater)	7%	29%	2%
Visited a farm, ranch or agritourism site	12%	11%	1%
Snowmobiling	3%	47%	1%
None of these	5%	15%	1%
Bicycling or mountain biking	9%	8%	1%
Snow skiing or snowboarding	4%	17%	1%
Motorcycling	4%	8%	0%
Bird watching	10%	1%	0%
Boating	4%	0%	0%

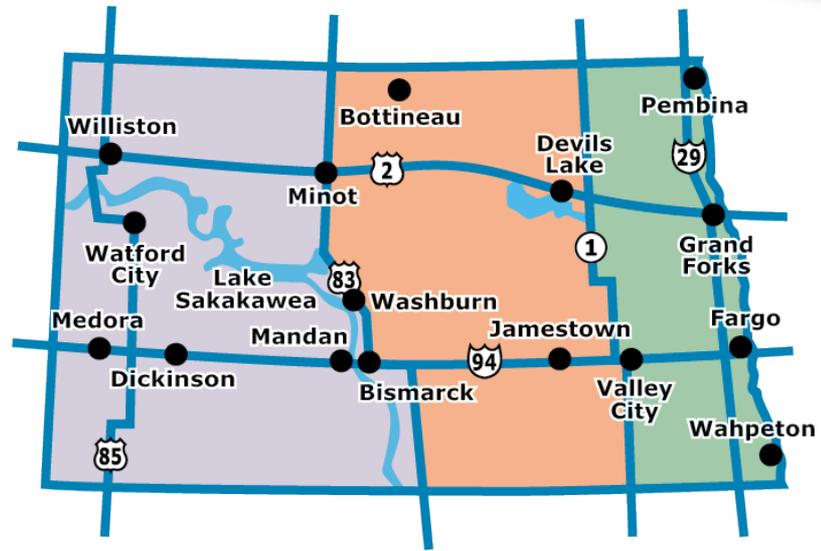
Market Trip Motivation

- SMARInsights' consistently sees shopping as a major trip activity, but rarely is it considered a travel motivation. However, Canadian visitors come to North Dakota for available shopping opportunities. It is significantly the highest travel motivator from the provinces.
- Among domestic visitors, more traditional product motivates travel. 2016 was the Centennial of the National Park Service, and early indications are parks saw an uptick in attendance. Although there were other motivators for domestic trips, the national parks play an integral role.

Net Motivation	Canada	Domestic
Visited a national park	3%	20%
Visited historical sites	5%	13%
Scenic drive	9%	12%
Camping	5%	12%
Shopping	63%	11%
Hiking or backpacking	3%	10%
Visited a state park	2%	10%
Wildlife watching	2%	10%
Ate at unique, local restaurants	14%	9%
Visited Native American sites	2%	7%
Attended a festival or event	2%	5%
Visited museums	4%	5%
Sightseeing tour	3%	5%
Golfing	2%	4%
Gambling	4%	3%
Hunting	0%	3%
Attended a meeting or convention	2%	3%
Canoeing or kayaking	0%	3%
Fishing	1%	2%
Horseback riding	0%	2%
Attended performing arts	1%	2%
Visited a farm, ranch or agritourism site	0%	1%
Snowmobiling	1%	1%
Bicycling or mountain biking	1%	1%
Snow skiing or snowboarding	0%	1%
Motorcycling	0%	0%
Bird watching	0%	0%
Boating	0%	0%
Other	7%	6%

Regions Visited

- The specific travel regions visited by the target markets are highly dependent on proximity, with Minneapolis and Manitoba primarily visiting the East and Saskatchewan the West.
- However, the more distant markets are apt to include more regions on their trip.
- Through past Visitor Profile research for North Dakota and surrounding states, SMARInsights has seen that consumers often visit a number of states in the region on a single trip. So rather than visiting for a single destination or attractions, those from more distant markets could be making a trip to North Dakota part of a larger trip, so they cover more ground.



	West	Central	East
Minneapolis	37%	34%	67%
Wisconsin Target Markets (& Duluth)	44%	45%	54%
Other MN, WI, IL, incl. Chicago	38%	38%	36%
Manitoba	10%	14%	88%
Saskatchewan	58%	42%	24%

Cities and Attractions Visited

- Visitation to individual attractions and communities varies by proximity. But as the population center, the East region sees the most visitation from both domestic and Canadian visitors.

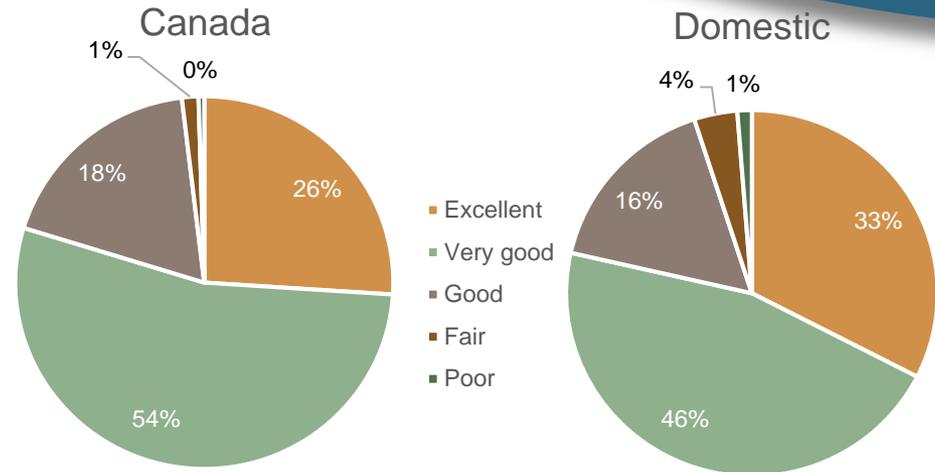
West Region	Canada	Domestic	Central Region	Canada	Domestic	East Region	Canada	Domestic
Theodore Roosevelt National Park	18%	49%	Jamestown	14%	43%	Fargo-West Fargo-Moorhead	64%	72%
Western State Parks	7%	40%	Devils Lake Region	17%	42%	Grand Forks	86%	30%
Lake Sakakawea	18%	33%	Bismarck-Mandan	24%	41%	Valley City and the Sheyenne River Valley National Scenic Byway	1%	15%
Dickinson	16%	27%	Washburn	5%	19%	Wahpeton	2%	8%
Medora	11%	27%	Central State Parks	9%	18%	Eastern State Parks	9%	8%
Standing Rock National Native American Scenic Byway	16%	25%	Germans from Russia Region	2%	16%	Pembina Gorge Region	10%	5%
Watford City	9%	15%	Turtle Mountain Region	19%	16%			
Williston	11%	11%	Minot	59%	13%			
Knife River Indian Villages NHS	2%	11%						

2016 Advertising Effectiveness & ROI

SATISFACTION & ADVOCACY

Trip Satisfaction

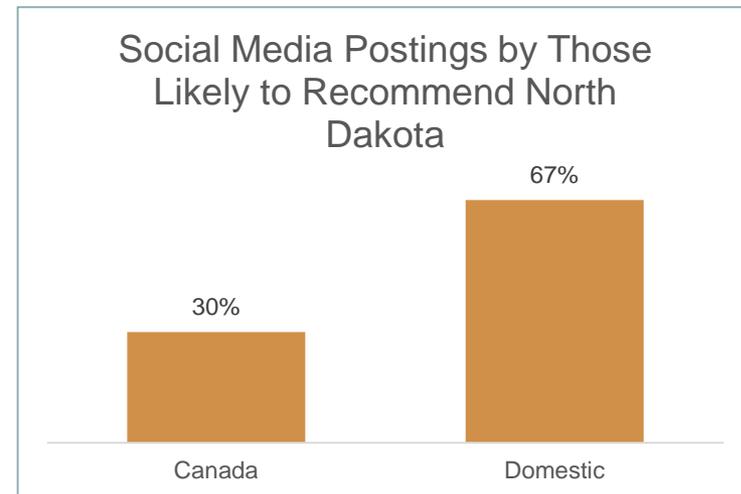
- SMARInsights' methodology for evaluating marketing effectiveness has changed as the travel planning process has changed. Recently, trip satisfaction and advocacy have been added as important measures as consumer involvement as brand promoters has become increasingly important for destination marketing organizations.
- Those who are aware of North Dakota's marketing are more positive about their trip, an indication the experience lives up to the brand promise featured in the creative.



Brand Advocates

- It is important for the advertising to influence consumers, but the state’s travel industry also must fulfill its role to ensure visitors are having an experience that will make them want to return, speak positively about the trip with friends and family, and promote the destination via social media channels. How the industry follows through on the marketing messages is often out of the control of the DMO.
- While half of domestic visitors are posting about their North Dakota trip, there could be an opportunity to move Canadians to become advocates. They are just as satisfied with their trips to the state but far less likely to post on social media about it.

	Canada	Domestic
Facebook	20%	43%
Twitter	4%	14%
Flickr	0%	4%
YouTube	2%	13%
Blogs	3%	7%
Instagram	7%	15%
Pinterest	0%	4%
None of these	76%	51%



Visitor Demographics

- Differences in social media postings about North Dakota trips could be attributable to demographics, as Canadian visitors are slightly older than domestic visitors. Canadians are also better educated and have higher incomes.
- It is also important that the media reach consumers who are similar to North Dakota visitors. Well educated, upper income households are traditionally more difficult to reach because they consume media differently.



	Age	Married	Kids in HH	High School or Some College	College Grad or Higher	Income Under \$50K	Income \$50K-\$100K	Income Over \$100K
2016 Visitors								
Domestic	42	63%	38%	32%	68%	30%	36%	34%
Canada	45	63%	31%	29%	71%	25%	35%	40%
Aware HHs	42	62%	41%	40%	60%	32%	45%	23%

2016 Advertising Effectiveness & ROI

DAKOTA ACCESS PIPELINE

Destination Challenges

- DMOs continually deal with disasters, often falling in one of three categories:

Environmental:

- Tornadoes and floods, common in the central states, earthquakes, hurricanes, wildfires and oil spills

Political:

- Rights issues, controversial subjects, perception issues, gaffes

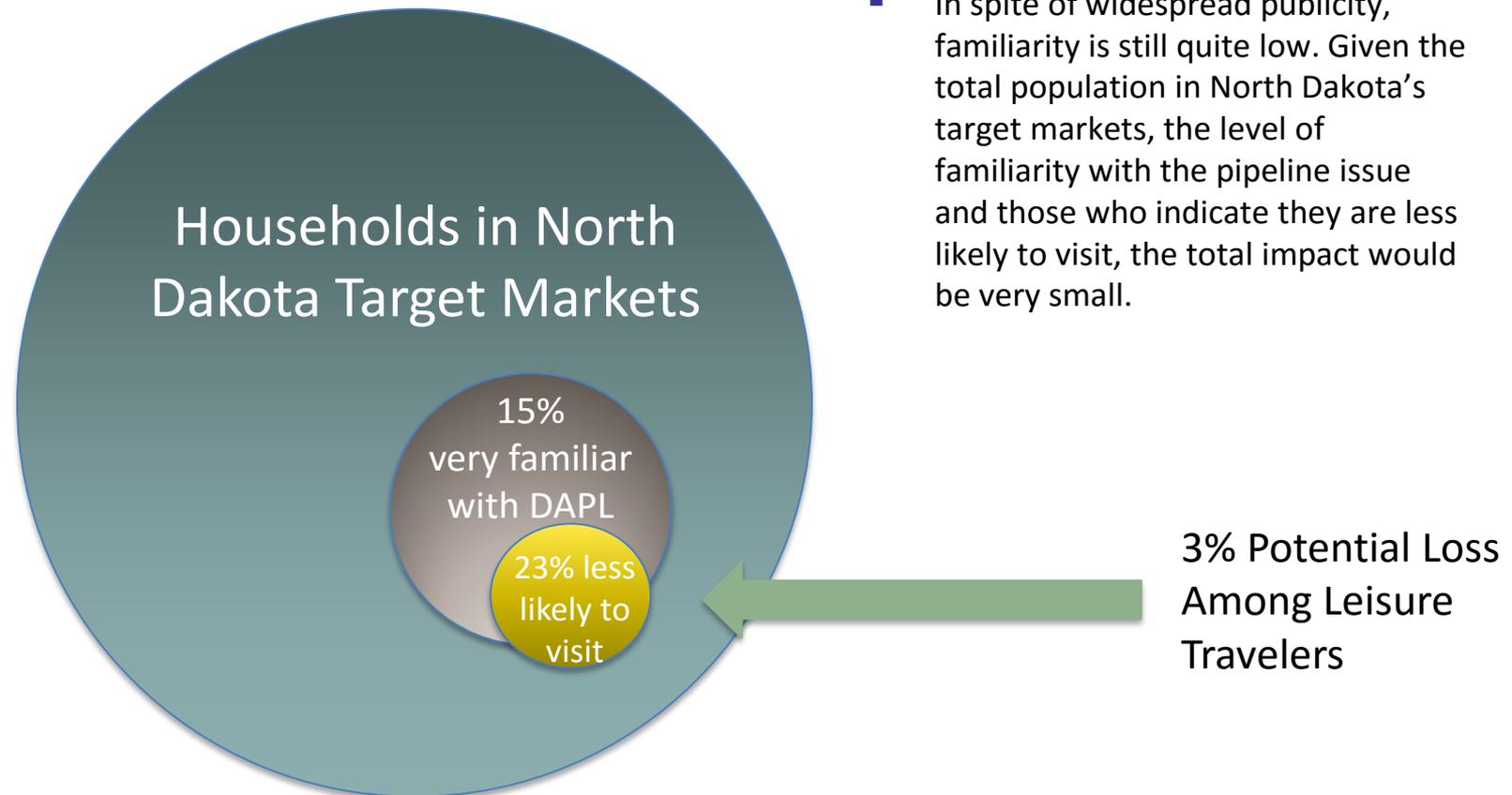
Social:

- Riots and protests, responses to law enforcement actions, pro and con rallies

Dakota Access Pipeline

- SMARInsights has measured responses to all types of disasters. The results have centered on:
 - The severity of the issue appears larger to those closest to it
 - Travel professionals are more likely to be impacted than leisure visitors
 - Changes in messaging are sometimes appropriate
- For the Dakota Access Pipeline, there is concern a political issue could influence leisure travel given the attention it has received.
- The North Dakota Tourism Division has included questions regarding the impact of the DAPL in existing research projects to understand if there is a need for a response or a potential loss of business.

Potential Impact on Visitation



Pipeline's Impact on Image

- Those familiar with DAPL remain more positive about North Dakota as a leisure destination. Those familiar with the issue are often from more nearby markets and are therefore more familiar with the state's product.
- There will likely be little, if any, overall impact on leisure travel.
- There has been no damage to the image of the state as a travel destination; no messaging addressing the issue is needed.
- North Dakota's brand is made up of life-long events, products and marketing.

Familiarity with DAPL	Not at all familiar	Very familiar	Difference
Is not too far away for a vacation	3.4	4.0	0.6
Is a place for which I often notice advertising	2.7	3.2	0.5
Is a good value for the money	3.4	3.9	0.5
Is a great place for winter sports, including snowmobiling	3.4	3.9	0.5
Is growing	3.2	3.7	0.5
Has a good business environment	3.0	3.4	0.4
Is a good place to relax in peace and quiet	3.6	4.1	0.4
Offers lots of outdoor activities such as hiking, fishing and hunting	3.7	4.1	0.4
Is a place to enjoy western culture	3.4	3.8	0.4
Is a good place to raise a family	3.2	3.6	0.4
Offers good opportunities for wildlife viewing	3.6	4.0	0.4
Is rich with history	3.4	3.8	0.4
Is a good place for a meeting or convention	2.9	3.3	0.4
Offers great camping and RVing	3.5	3.9	0.4
Has interesting small towns/rural areas	3.5	3.9	0.4
Has interesting historical sites and museums	3.4	3.8	0.4
Is a good place for cultural activities	3.1	3.5	0.4
Has quality hotel and resort accommodations	3.3	3.7	0.4
Has beautiful natural scenery	3.8	4.1	0.3
Is a great place for entertainment, theater and the arts, live music	2.9	3.2	0.3
Is a good place for family vacations	3.4	3.7	0.3
Appeals to the interests of everyone in my travel party	3.1	3.4	0.3
Has unique, local restaurants	3.2	3.5	0.3
Has interesting cities	3.1	3.4	0.3
Is a fun place to visit	3.3	3.6	0.3
Is an exciting place to visit	3.1	3.4	0.3
Has lots to see and do	3.3	3.5	0.2
Is a great place for shopping	3.0	3.2	0.2

2016 Advertising Effectiveness & ROI

QUESTIONNAIRE

Questionnaire

**North Dakota Tourism
Ad Awareness and ROI
October 2016**

ZIP: What is your ZIP code? _____

These are the screeners to identify leisure travel decision makers.

S1. Please indicate which of the following describe you. Select all that apply.

[ROTATE]	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	<input type="checkbox"/>	<input type="checkbox"/>
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF -0, TERMINATE AFTER SCREENING QUESTIONS)	<input type="checkbox"/>	<input type="checkbox"/>
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	<input type="checkbox"/>	<input type="checkbox"/>
I use video streaming services like Hulu or Netflix	<input type="checkbox"/>	<input type="checkbox"/>

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

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

AGE: What is your age? _____ [TERMINATE under 18 / over 65]

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

1. Thinking about places to go for domestic leisure trips, what STATES come to mind as good places to go? [USE DROP DOWN LISTS]

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

2. How familiar are you with each of the following states and provinces, 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
Iowa				
Nebraska				
North Dakota				
Manitoba (Canada)				
Minnesota				

1

Montana				
Saskatchewan (Canada)				
South Dakota				
Wyoming				

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

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
Iowa					
Nebraska					
North Dakota					
Manitoba (Canada)					
Minnesota					
Montana					
Saskatchewan (Canada)					
South Dakota					
Wyoming					

4. Which of the following states and provinces would you prefer to visit for a leisure trip within the next year? **Please select only one.** [ROTATE]

Iowa	
Nebraska	
North Dakota	
Manitoba (Canada)	
Minnesota	
Montana	
Saskatchewan (Canada)	
South Dakota	
Wyoming	
Other, please specify	

5. Have you visited any of the following states and provinces in 2016 for a leisure trip that included an overnight stay? How many overnight leisure trips did you take in each state in 2016?

[ROTATE]	States visited in 2016	Number of overnight visits in 2016
Iowa		
Nebraska		
North Dakota		
Manitoba (Canada)		
Minnesota		
Montana		
Saskatchewan (Canada)		

2

Questionnaire

South Dakota		
Wyoming		
None of these		

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

6. In the course of planning for any recent or upcoming trips to North Dakota, have you gathered information in any of the following ways?
1. Requested a North Dakota Visitor's Guide
 2. Visited the North Dakota Tourism site, www.ndtourism.com, www.legendarynd.com or northdakotalegendary.com
 3. Visited the North Dakota Facebook page
 4. Followed North Dakota on Twitter
 5. Followed North Dakota on Instagram
 6. Requested information about a North Dakota trip in another way
 7. Received an e-newsletter
 8. None of these

[IF Q6 2-1, ASK Q7]



Q7. Is this the North Dakota website you visited?

1. Yes
0. No

[IF 6 3-1, ASK Q7A]



Q7a. Is this the North Dakota Facebook page you accessed?

1. Yes
0. No

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

[HAVE THEM RATE NORTH DAKOTA IF AT LEAST NOT VERY FAMILIAR AT Q2]

[ROTATE]	Strongly disagree			Strongly agree
Is a fun place to visit				
Is an exciting place to visit				
Appeals to the interests of everyone in my travel party				
Is rich with history				
Has beautiful natural scenery				
Offers great camping and RVing				
Has interesting historical sites and museums				
Is a place to enjoy western culture				
Is a good place to relax in peace and quiet				
Is not too far away for a vacation				
Offers lots of outdoor activities such as hiking, fishing and hunting				
Offers good opportunities for wildlife viewing				
Is a great place for winter sports, including snowmobiling				
Has interesting cities				
Is a good place for family vacations				
Is a good value for the money				
Has quality hotel and resort accommodations				
Has unique, local restaurants				
Is a good place for cultural activities				
Is a good place for a meeting or convention				
Is a good place to raise a family				
Has a good business environment				
Is growing				
Has interesting small towns/rural areas				
Has lots to see and do				
Is a great place for entertainment, theater and the arts, live music				
Is a great place for shopping				
Is a place for which I often notice advertising				

[IF Q5 IS NOT NORTH DAKOTA SKIP TO AD SECTION]

Now, please give us some information about the trip(s) you took to North Dakota in 2016.

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

9. When in 2016 did you visit North Dakota for a leisure trip? [ACCEPT MULTIPLES]

- 1..... January 2016
- 2..... February 2016

Questionnaire

- 3..... March 2016
- 4..... April 2016
- 5..... May 2016
- 6..... June 2016
- 7..... July 2016
- 8..... August 2016
- 9..... September 2016
- 10..... October 2016
- 11..... November 2016

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

10_1. How many nights did you spend in North Dakota during this trip? _____

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

[ASK Q10b if Q10_2>1]

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

10d. 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

IF Q10_1=0, SKIP TO Q 11

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

11. Which of the following activities did you participate in during your trip to North Dakota? Select all that apply.

Hiking or backpacking	Attended a festival or event	
Visited a state park	Attended performing arts (music/theater)	
Bicycling or mountain biking	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	
Boating	Golfing	

5

Fishing	Shopping	
Visited museums	Gambling	
Motorcycling	Visited a national park	
Ate at unique, local restaurants	Other	
Attended a meeting or convention	None of the above	

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

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

INSERT NORTH DAKOTA REGIONS MAP

E:\Ads Master\North Dakota\2016 Ad Fit & Vis Profile NDAK106\ND Region_map-01 (002)

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

FOR EACH REGION MARKED AT Q13, ASK Q13A

Q13A. Which of the following places or attractions did you visit in North Dakota?

West	Central Region	East Region
Theodore Roosevelt National Park	Bismarck-Mandan	Fargo-West Fargo-Moorhead
Williston, including the Fort Union Trading Post NHS	Minot	Grand Forks
Knife River Indian Villages NHS	Devils Lake region including Fort Totten and Sully's Hill	Pembina Gorge region including the cities of Pembina, Walthalla and Grafon
Lake Sakakawea	Jamestown	Wahpeton
Dickinson	Germania from Russia region, including the cities of Wishek, Linton and Strasburg	Valley City and the Sheyenne River Valley National Scenic Byway
Watford City	Washburn, including the Lewis & Clark Interpretive Center and Fort Mandan	State Parks including Fort Ransom, Turtle River and Icelandic
Medora	Turtle Mountain region including the International Peace Garden and cities of Bottineau, Rolla and Belcourt	
Standing Rock National Native American Scenic Byway	State Parks including Lake Metigoshe, Graham's Island and Beaver Lake	
State Parks including Fort Stevenson, Sakakawea, Fort Abraham Lincoln, Lewis & Clark, Cross Ranch, Little Missouri and Sully's Creek		

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

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

6

Questionnaire

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

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

Please complete all fields – best estimate is fine. If no expenditures in a category enter a “0”

- Lodging/Accommodations _____
- Meals/Food/Groceries _____
- Attractions _____
- Shopping _____
- Entertainment such as shows, theater or concerts _____
- Recreation (including hunting, fishing, golf, and rentals such as bikes, boats, etc) _____
- Transportation to North Dakota _____
- Transportation within North Dakota _____
- Other _____

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

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

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

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

23. How likely are you to recommend a trip to North Dakota?

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

Questions 24-27 will be used to measure recall of North Dakota advertising.

24. Have you seen any advertising for North Dakota as a travel destination?

- 1. Yes → ASK 24A
- 0. No

24a. What do you recall about the ads? _____

7

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

TV



City_TV.mov
https://youtu.be/1_39oc5ND



History_TV.mov
<https://youtu.be/1xCGPTD0Xc>



ND_TRNP ad.mov
https://youtu.be/Cmldaf7K_vM



Road Trip_TV.mov
<https://youtu.be/aRG6qWwE1kQ>

ASK FOR EACH VIDEO

TV. How many times have you seen this or a similar ad for North Dakota?

- More than three times
- Two or three times
- Once
- Never

ASK FOR EACH AWARE

TVA. Where do you recall seeing the ad? Select all that apply.

- 1. On TV
- 2. Online
- 3. Don't recall

ASK FOR EACH VIDEO

TVB. What is your reaction to this ad?

- 1. Positive
- 2. Negative – ASK TVC
- 3. Neutral

TVC. Why do you feel that way? _____

8

Questionnaire

PRINT



Biking.pdf
Biking.jpg



City.pdf
City.jpg



Fishing.pdf
Fishing.jpg



History.pdf
History.jpg



MWL-front cover_ND_FINAL_HiRez.pdf
MWL-front_cover_ND_FINAL_HiRez.jpg



TRNP.pdf
TRNP.jpg

26A. Please indicate in the box to the left of each print ad which you recall seeing before now.

Q26Ab. What is your reaction to these ads?

1. Positive
2. Negative – ASK Q26Ac
3. Neutral

Q26Ac. Why do you feel that way?

DIGITAL

BANNER ADS



Digital. Please indicate in the box to the left of each online ad which you recall seeing before now.

DigitalB. What is your reaction to these ads?

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

DigitalC. Why do you feel that way? _____

NEWSPAPER INSERTS

Fall



Fall Insert_Front.pdf
Fall Insert_Front.jpg



Fall Insert_Back.pdf
Fall Insert_Back.jpg

Summer

Spring



Spring Insert_Front.pdf
Spring Insert_Front.jpg



Spring Insert_Back.pdf
Spring Insert_Back.jpg

Questionnaire



Summer Insert 8 Summer Insert 8 Summer Insert 8
 pages_Page_1.jpg pages_Page_2.jpg pages_Page_3.jpg pages_Page_4.jpg

26A. Please indicate in the box to the left of each newspaper insert which you recall seeing before now.

Q26Ab. What is your reaction to these ads?

1. Positive
2. Negative – ASK 26Ac
3. Neutral

Q26Ac. Why do you feel that way? _____

OUTDOOR --



Billboard Poster Biking 1.pdf
 Billboard Poster_Biking 1.jpg
 Billboard Poster Fishing 1.pdf
 Billboard Poster_Fishing 1.jpg
 Billboard Poster History 1.pdf
 Billboard Poster_History 1.jpg



Billboard Poster History 2.pdf
 Billboard Poster_History 2.jpg
 Billboard Poster TRNP 1.pdf
 Billboard Poster_TRNP 1.jpg
 Billboard Poster TRNP 2.pdf
 Billboard Poster_TRNP 2.jpg

SHOW ALL ON ONE PAGE

Please indicate in the box to the left of each outdoor ad which you recall seeing before now.

OutdoorB. What is your reaction to these ads?

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

OutdoorC. Why do you feel that way? _____

Questions 28-29 will be used to evaluate the messaging of the advertising.

AFTER ALL ADS SHOWN, ASK

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

[ROTATE]	Strongly disagree				Strongly agree
With a rich history	1	2	3	4	5
With unique offerings	1	2	3	4	5
With rugged landscapes	1	2	3	4	5
That gives you a sense of adventure	1	2	3	4	5
With a variety of experiences	1	2	3	4	5
That can provide legendary experiences	1	2	3	4	5

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

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

JD1. Are you familiar with the actor featured in the TV, print and outdoor ads?

1. Yes -> ASK JD2
0. No

JD2: Can you name the actor? _____

The actor featured is Josh Duhamel, a North Dakota native known for starring in the Transfomer films and the TV series "I as Vegas," among others. How much do you think the actor is...?

Authentic	1	2	3	4	5
Believable	1	2	3	4	5
A great spokesman for North Dakota	1	2	3	4	5

Questionnaire

SPONSORSHIPS



FSN_FINAL.Q1_15 Billboard.wmv
<https://youtu.be/bcJkrkVt27I>



Tickerflow.mov
<https://youtu.be/ojAD37yhqW0>

ASK FOR EACH

Do you recall seeing this or similar North Dakota sponsorship of sports or outdoor programming?

1. Yes
0. No

SponsorshipB. What is your reaction to these ads?

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

SponsorshipC. Why do you feel that way? _____

DAPL1. How familiar are you with the Dakota Access Pipeline?

3. Very familiar
2. Somewhat familiar
1. Not at all familiar – SKIP TO P1

DAPL2. How much will the issues surrounding the Dakota Access Pipeline affect your likelihood to visit North Dakota in the next 12 months?

- I am much more likely to visit
- I am somewhat more likely to visit
- I am neither more nor less likely to visit
- I am less likely to visit
- I am much less likely to visit

Questions P1-P3 are outdoor segmentation questions and D1-7 detail demographics.

P1. Please select which answer 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						

13

	1	2	3	4	5
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.					

P2. 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 Strongly disagree	2	3	4	5 Strongly 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					

P3. 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

14

Questionnaire

The following questions are for classification purposes only and will help us understand different groups of people.

DEMOS [ALL ON ONE SCREEN & DO NOT FORCE]

D1. Are you ...?
Male
Female

D2. Which of the following best describes your racial and ethnic heritage? Are you...?
Select all that apply.

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

D3. Are you currently ...?
Married
Divorced
Widowed
Single/Never married

D4. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]

D5. How many children under the age of 18 live in your household? _____

D6. Which of the following categories represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate degree

D7. Which of the following categories best represents your total annual household income before taxes?

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more