



# WELCOME

Destination Data: How Awareness Impacts Economy





DIRECTOR OF RESEARCH SERVICES

**Anna Blount**

# NORTH DAKOTA'S IMAGE



## "Halo Effect" Research

How does travel marketing contribute to broader economic development goals?



## Advertising Effectiveness

Find out if your advertising is working in terms of incremental visitation, spending, and messaging.



## Image Research

What does the traveling public think about your destination? Leverage your knowledge to build more powerful messages.



## Custom Research

Use our market research expertise to position your destination for success.

N O R T H  
**Dakota**

Be Legendary.™

**Longwoods**  
INTERNATIONAL

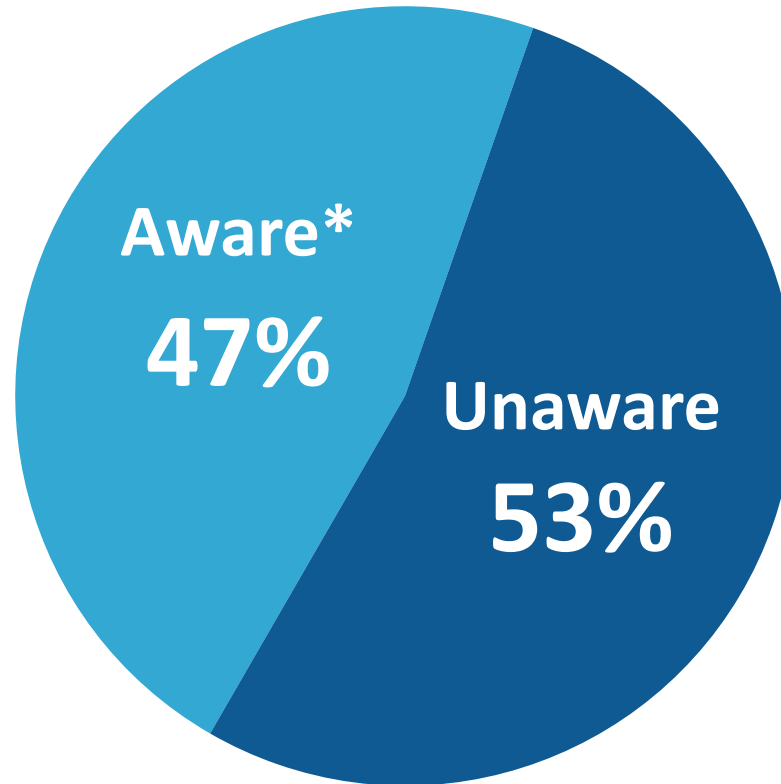
**Anna Blount**  
Director of Research Services

# 2020 Image & Halo Effect Study

- Markets where the study was conducted: Chicago, Wisconsin, Minnesota, Manitoba, and Saskatchewan.
- Measured effect of 2019 North Dakota advertising campaign across the following channels: digital, television, print, and out-of-home.
- Conducted in June 2020.
- Adults 18 years of age and older were randomly selected from the panel, to ensure a representative sample. Sample was drawn to be proportionate to population by specific states/DMA's/provinces, age, and sex to make sure they are representative of and projectable to these traveler populations.
- The objectives of the research include:
  - Key travel motivators for North Dakota;
  - Image of North Dakota in the areas that are important to travelers;
  - North Dakota's image strengths and weaknesses versus competitors; and
  - The impact of visitation and ad awareness on key overall economic development drivers.

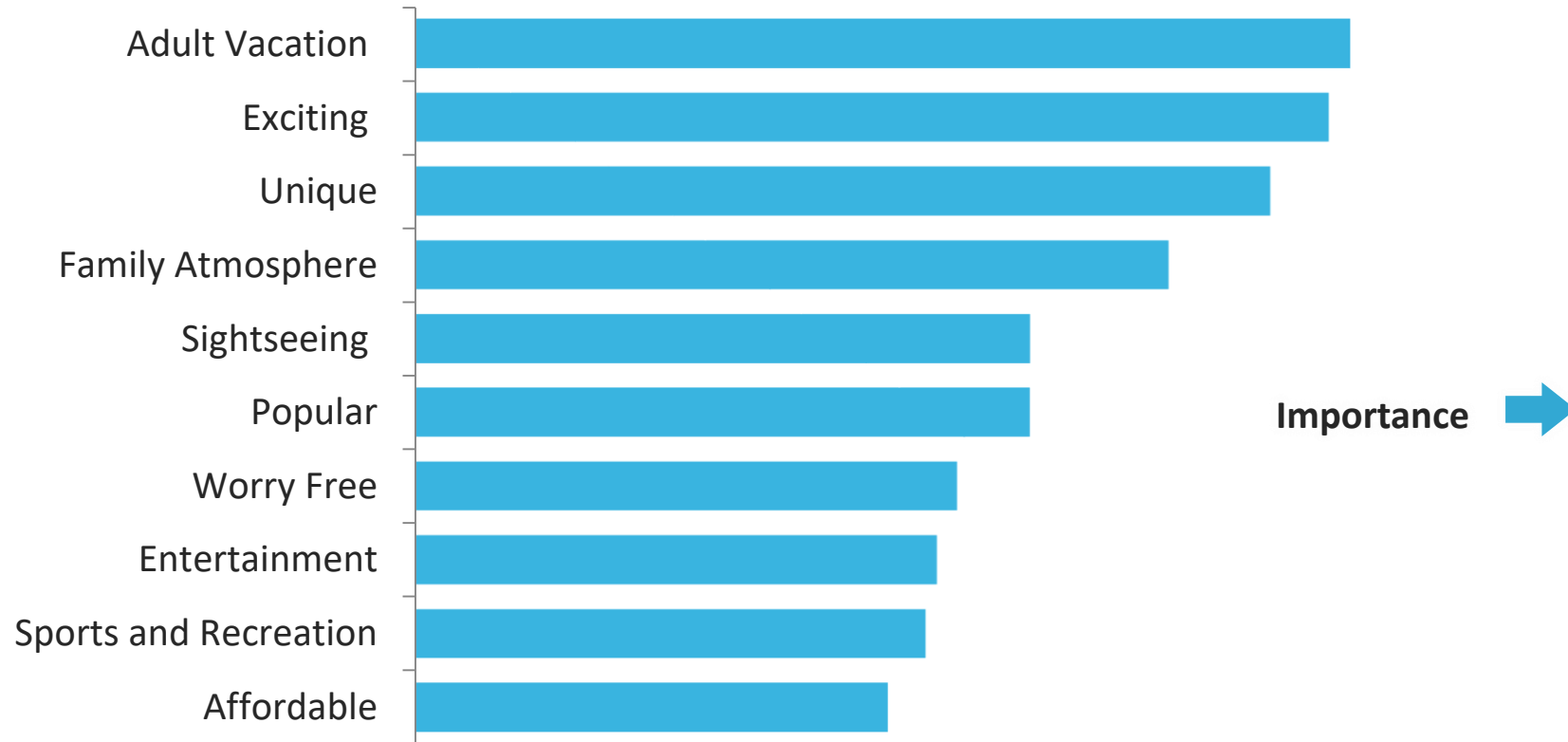
# Awareness of the Ad Campaign

Base: Residents of North Dakota's Regional Advertising Markets



\*Saw at least one ad

# Travel Motivators



\*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

# Top 10 Hot Buttons

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## Hot Buttons

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A fun place for vacation

Good for adult vacation

Lots to see and do

Must-see destination

An exciting place

Unique vacation experience

Vacation there is a real adventure

Children would enjoy

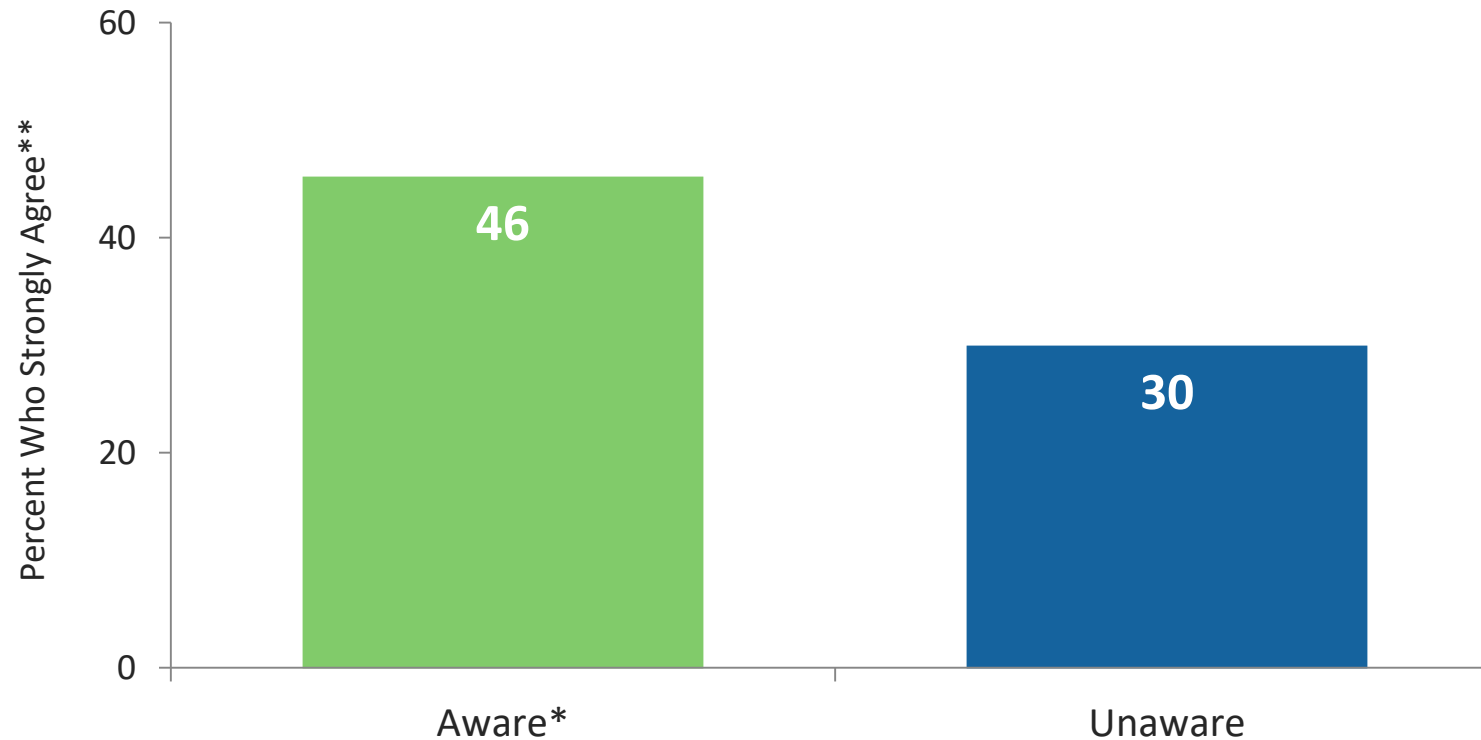
Popular with vacationers

Excellent vacation value

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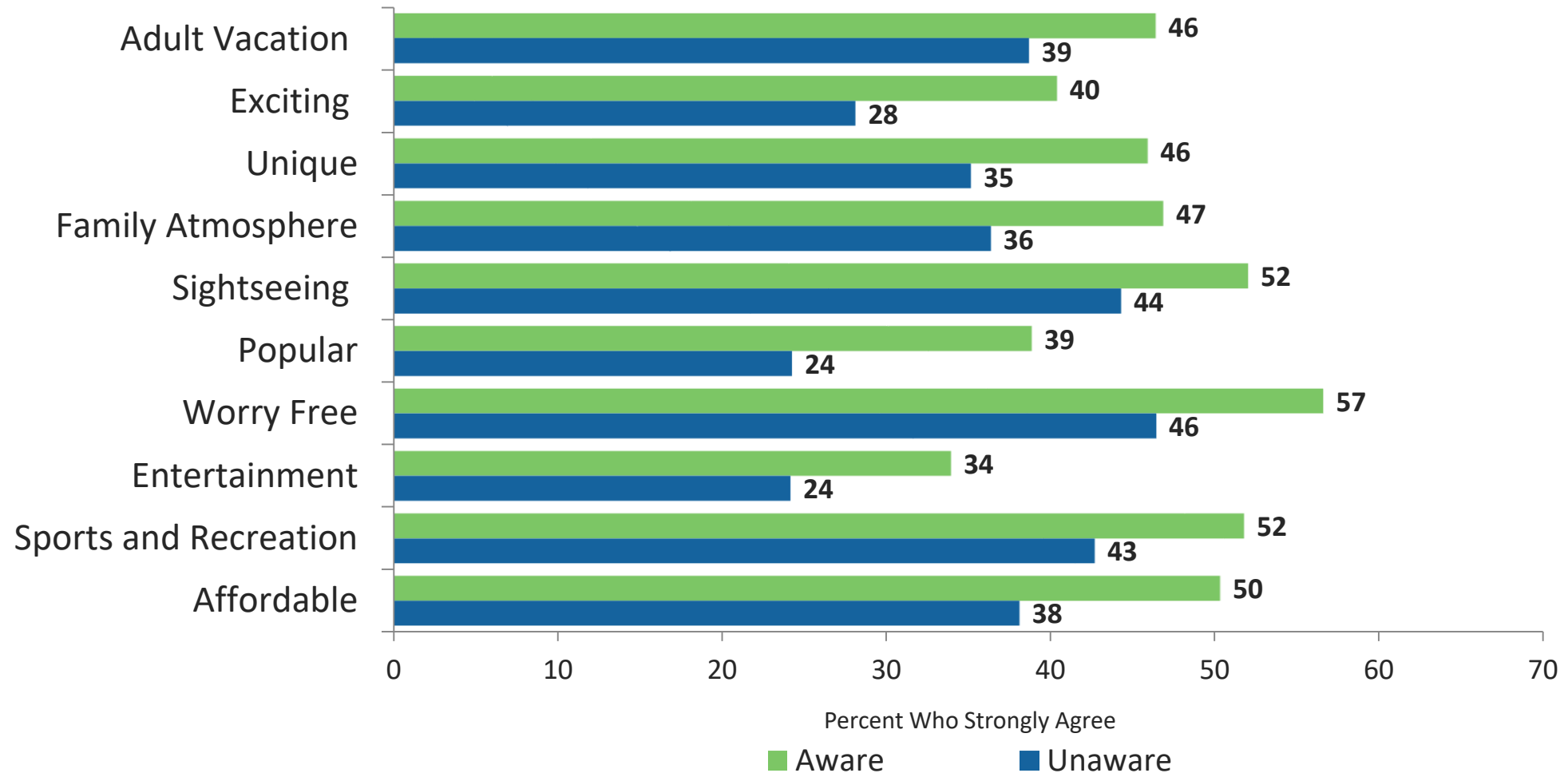
# Advertising Impact on North Dakota's Overall Image – “A place I’d really enjoy visiting”



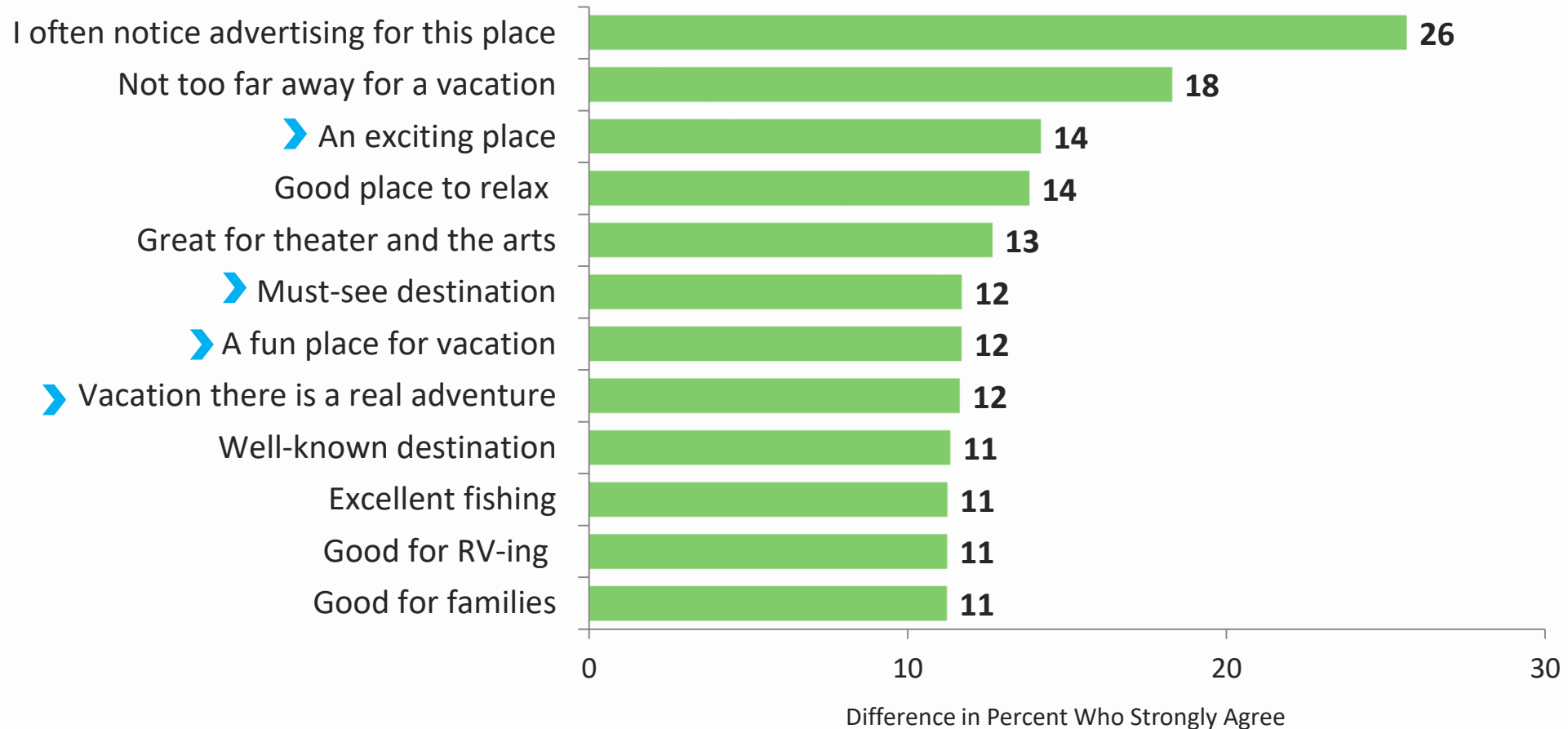
\*Saw at least one ad

\*\*“Percent who strongly agree” is the percent of respondents giving a statement on agree/disagree rating of 8, 9 or 10 out of 10

# Advertising Impact on North Dakota's Image

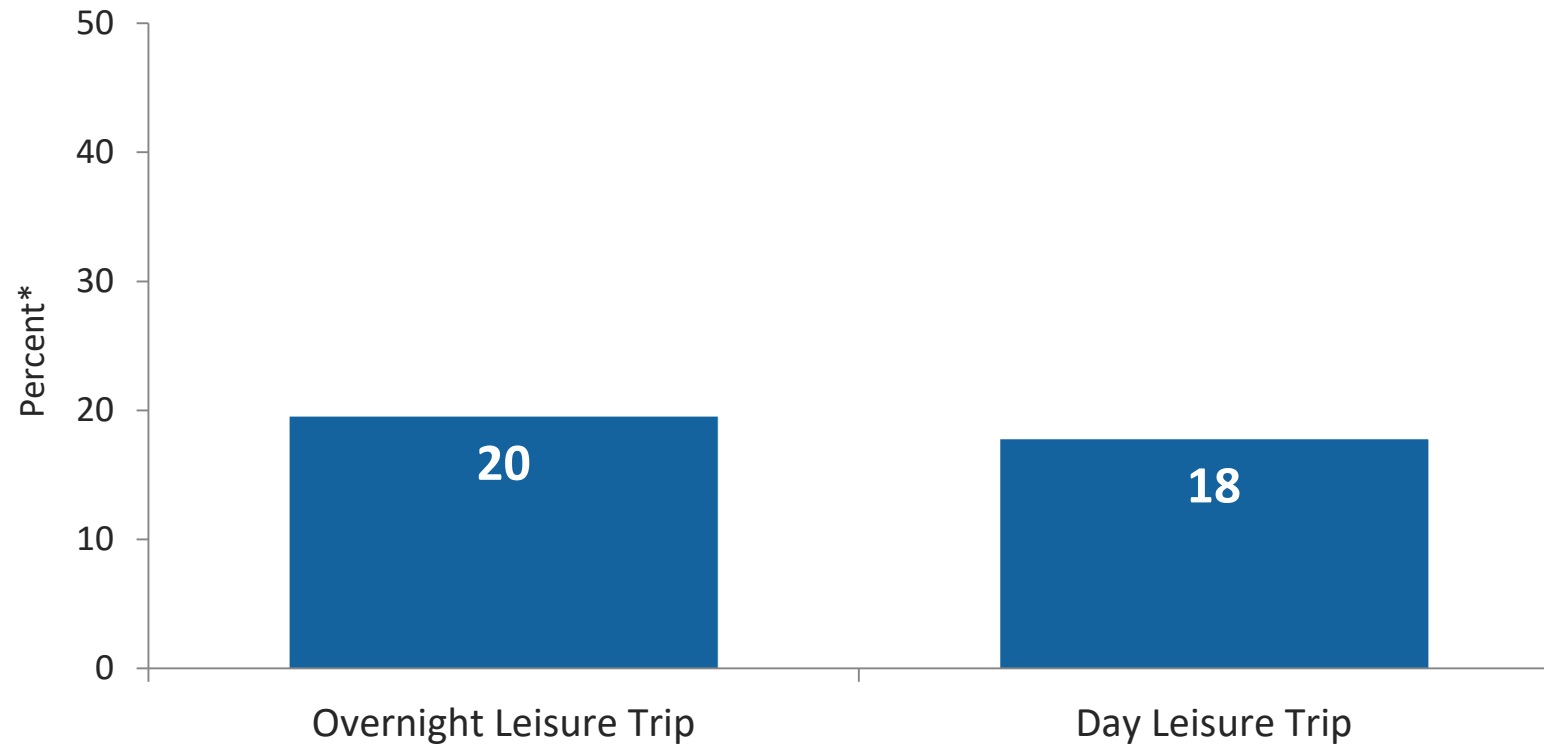


# Image Attributes Most Impacted by Advertising



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers










# Intent to Visit North Dakota in the Next 12 Months



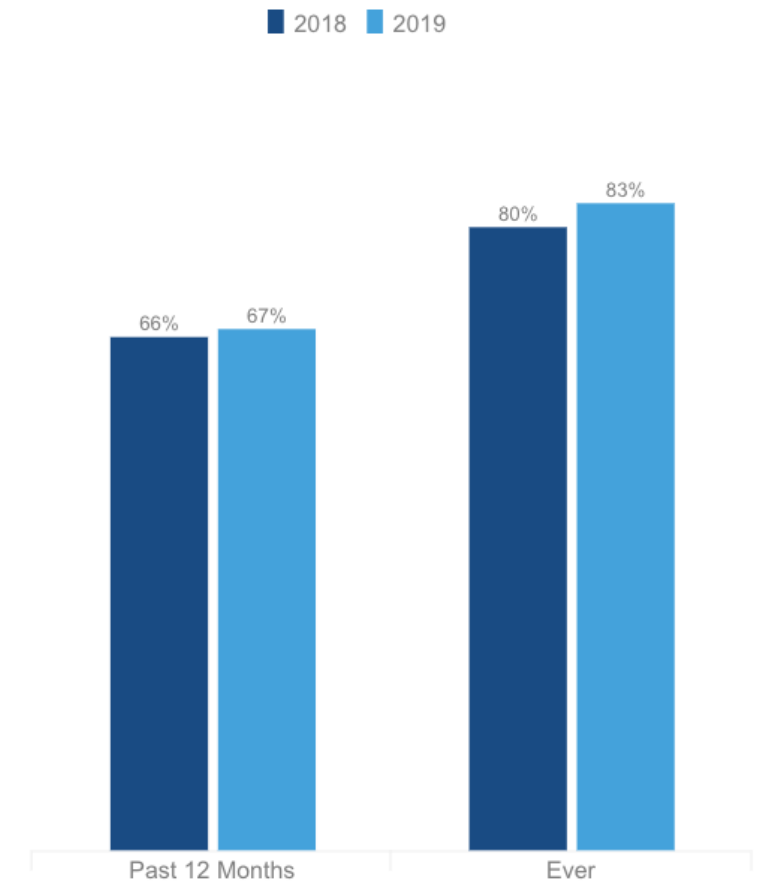
\*Percent of respondents who indicated they 'definitely will' or 'probably will' visit North Dakota in the next 12 months

# Travel USA® 2019 North Dakota Overnight Visitation

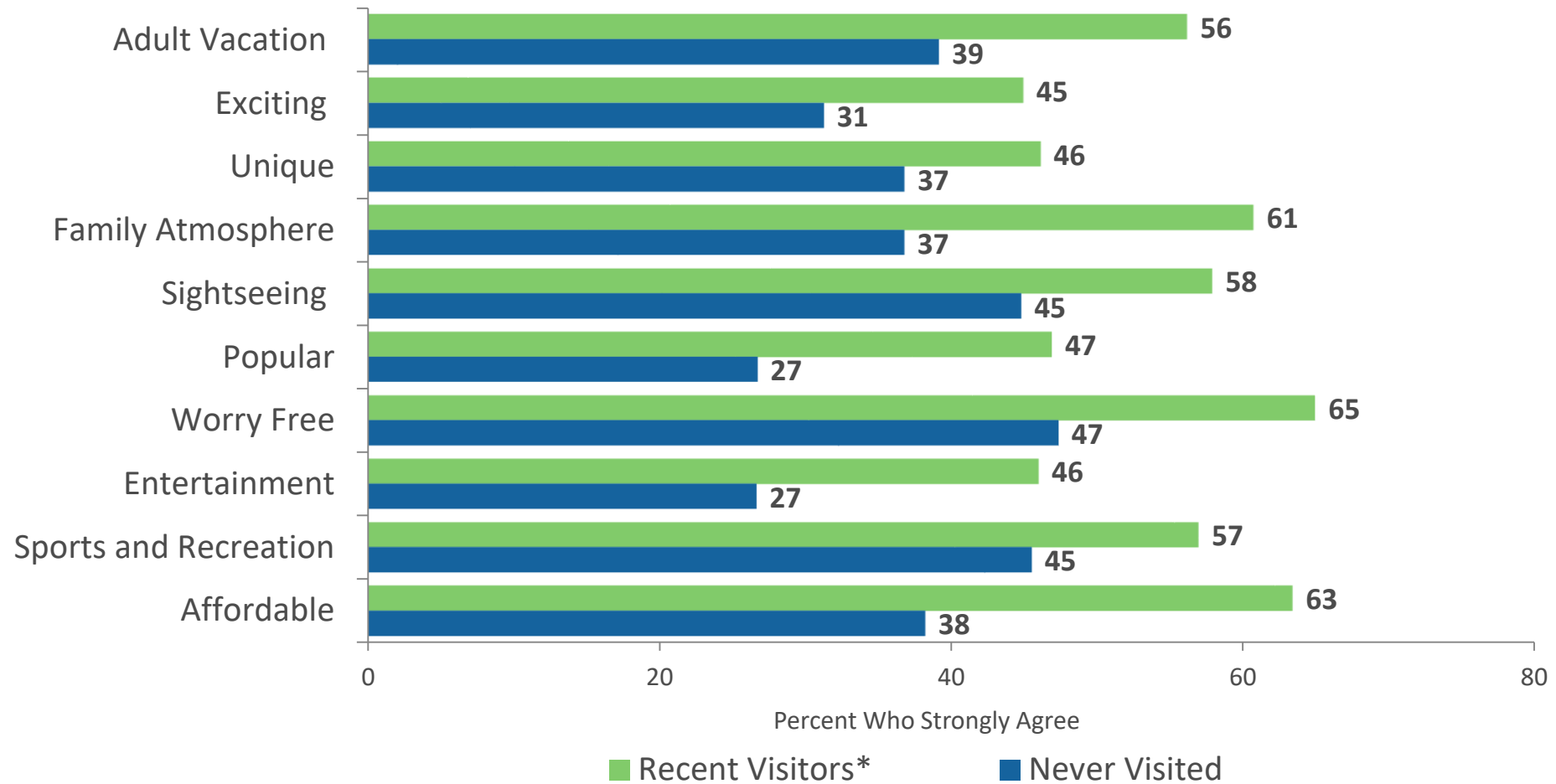
% Very Satisfied with Trip

	Overall trip experience	★★★★★☆☆☆☆	70%
	Friendliness of people	★★★★★☆☆☆☆	60%
	Safety and Security	★★★★★☆☆☆☆	59%
	Quality of accommodations	★★★★★☆☆☆☆	58%
	Cleanliness	★★★★★☆☆☆☆	57%
	Quality of food	★★★★★☆☆☆☆	57%
	Sightseeing and attractions	★★★★★☆☆☆☆	52%
	Value for money	★★★★★☆☆☆☆	49%
	Music/nightlife/entertainment	★★★★☆☆☆☆☆☆	39%

Past Visitation to North Dakota



# North Dakota's Product vs. Image

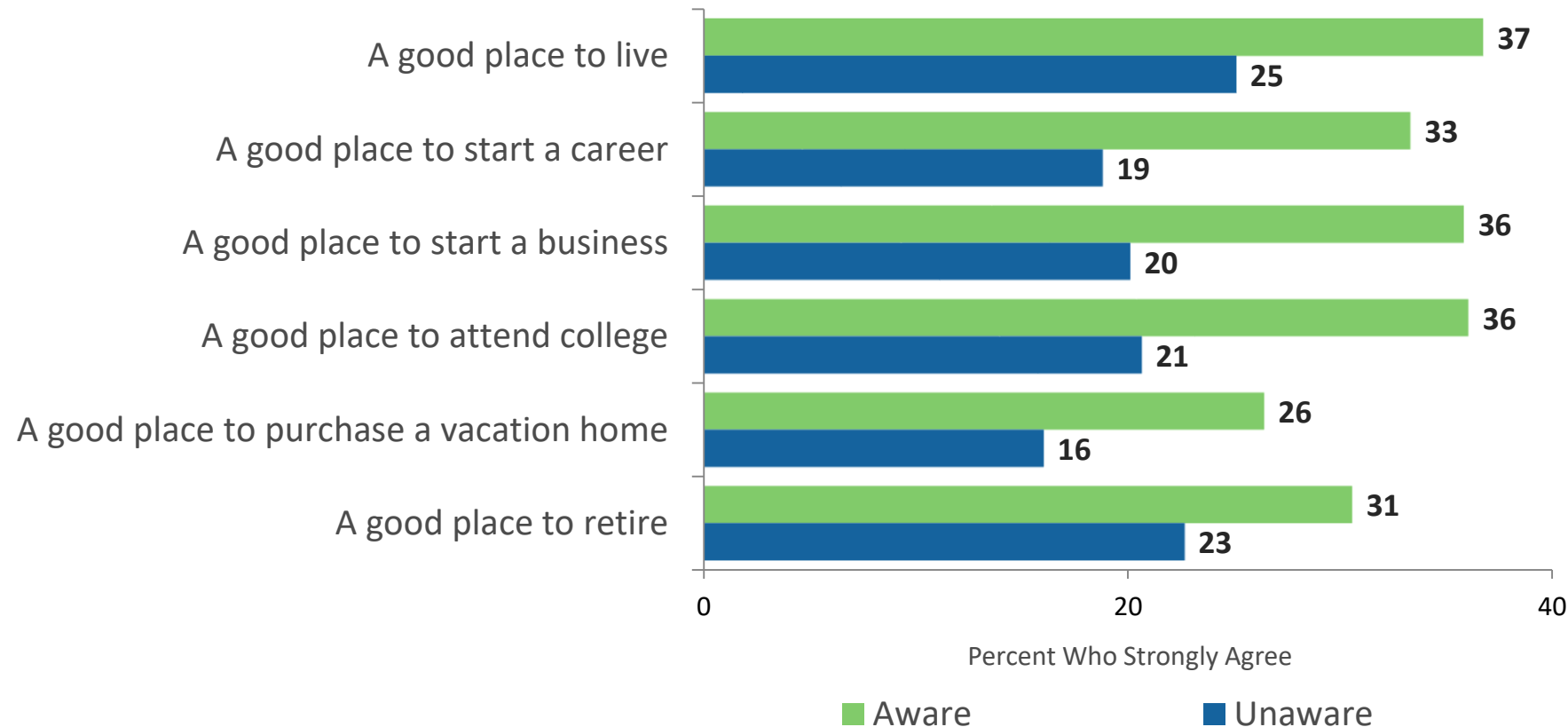


\* Visited in the past 2 years

# The halo effect of tourism advertising

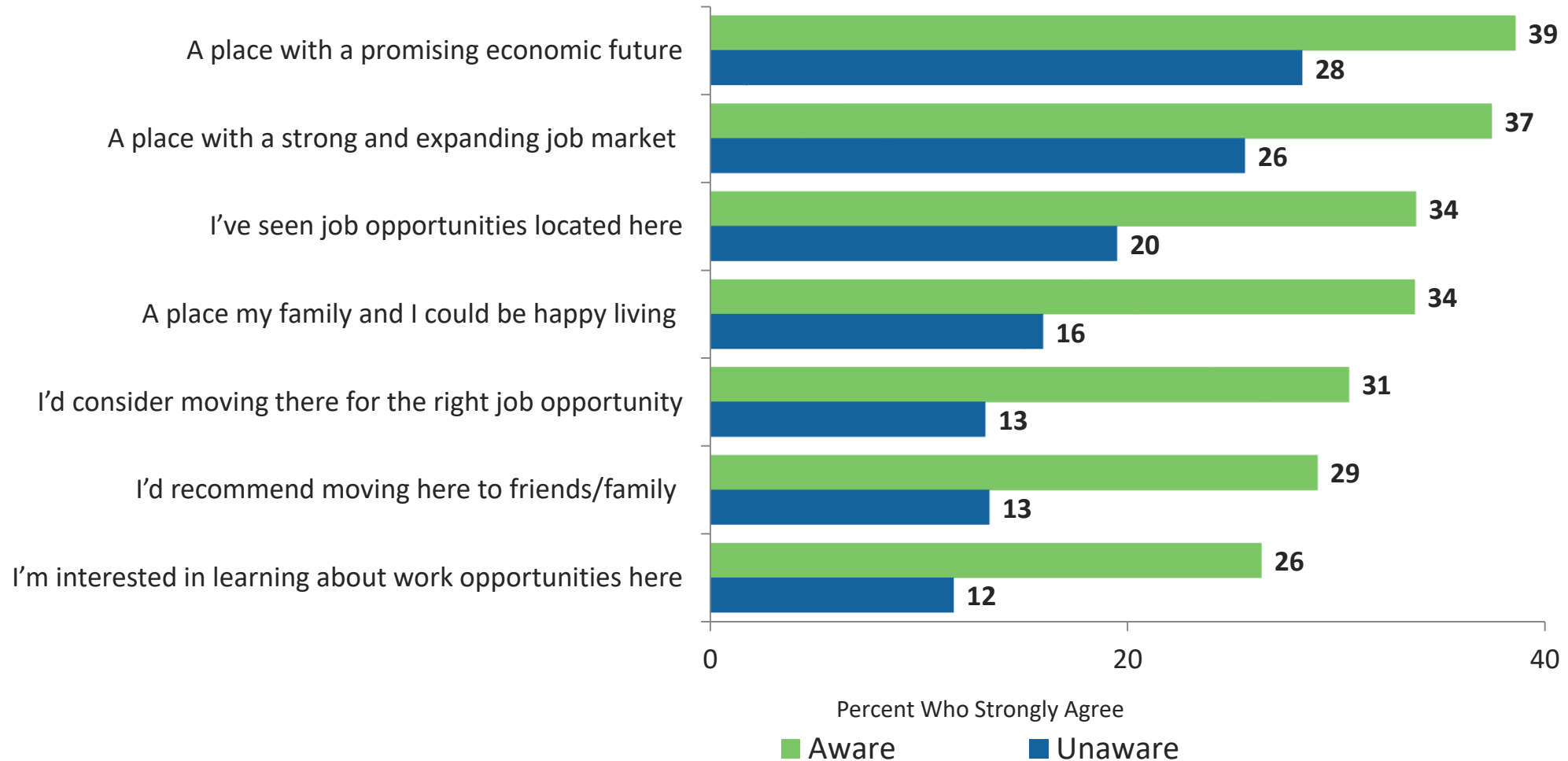


# Impact of *Tourism Ad Awareness* on North Dakota's Economic Development Image





# Impact of Advertising Awareness\* on North Dakota's Economic Development Attributes



\* Saw at least one ad

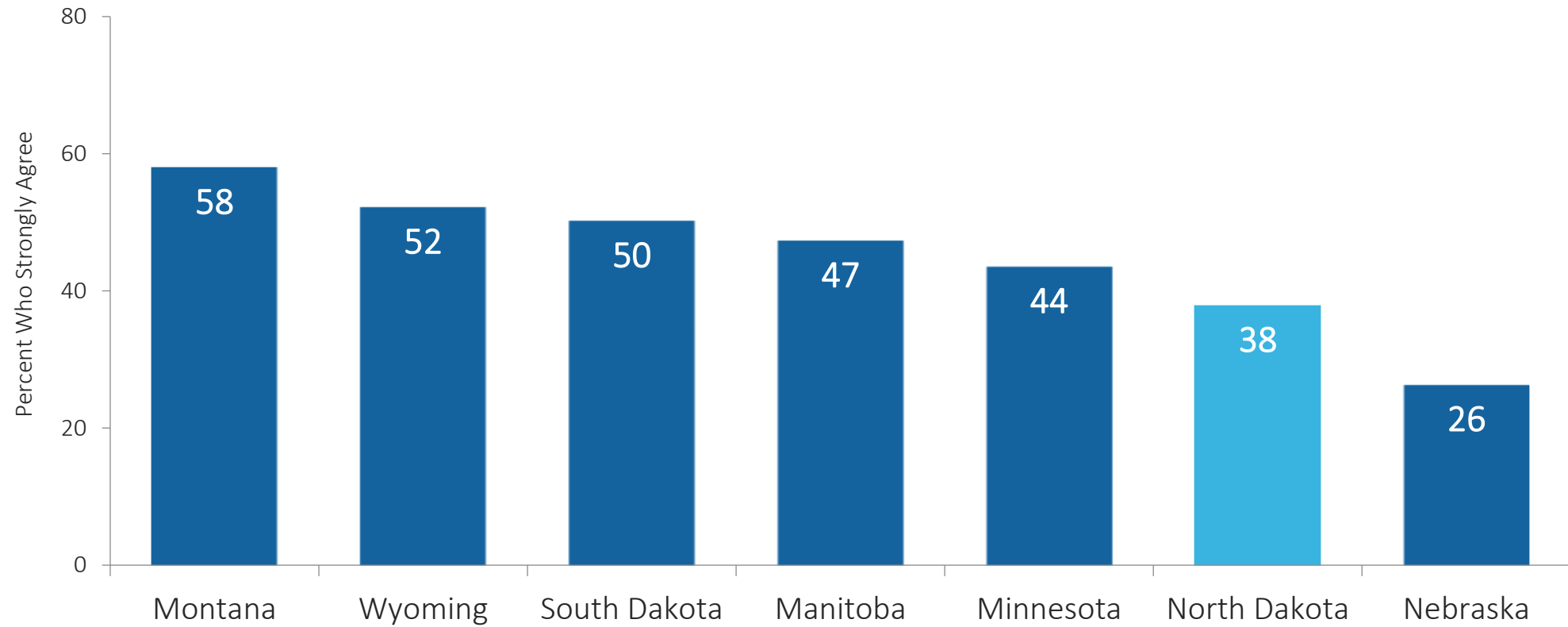
# Impact of Visitation on North Dakota's Economic Development Attributes



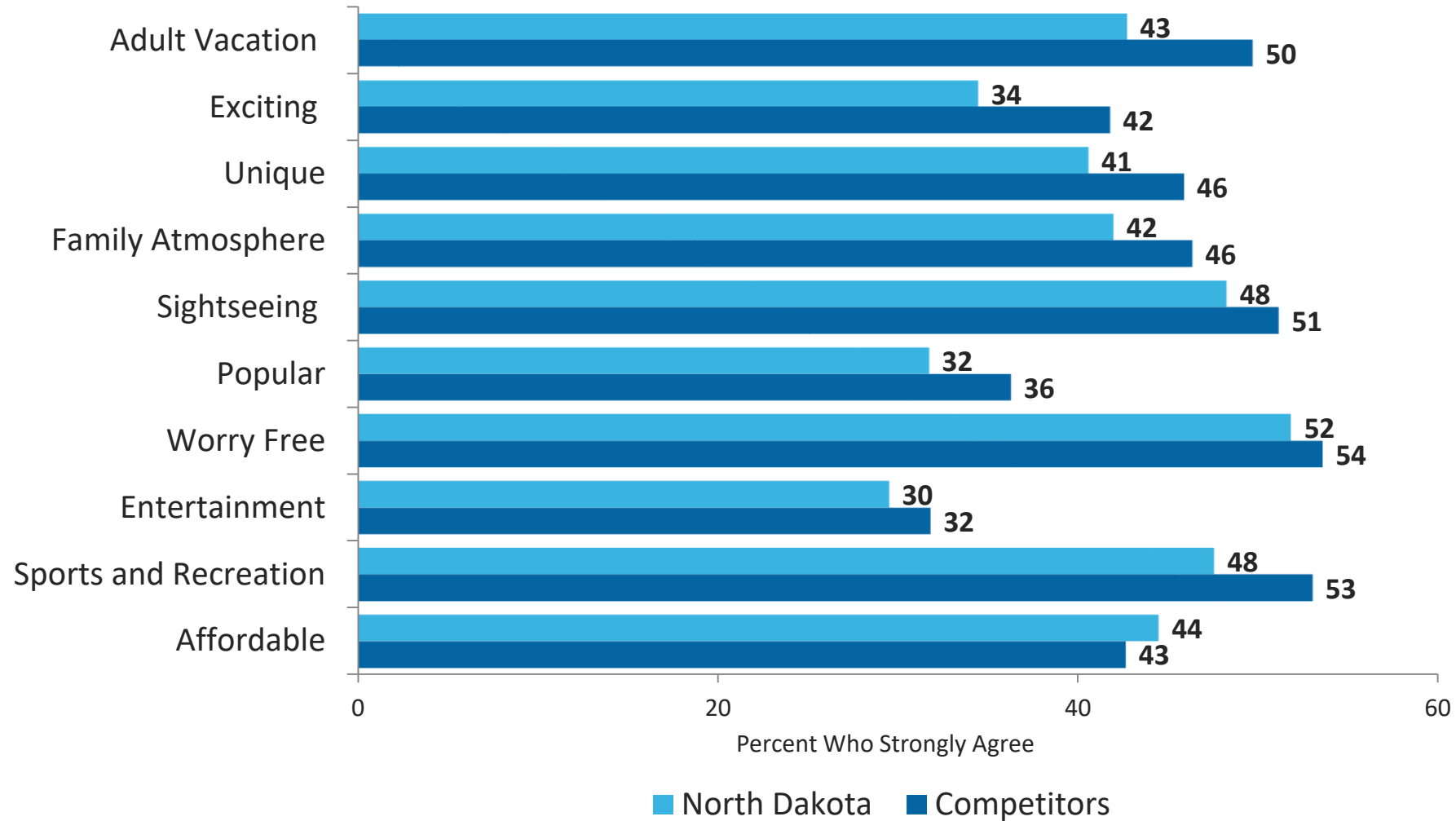
\* Visited in the past 2 years

# North Dakota's Visitation/Recruitment Cycle

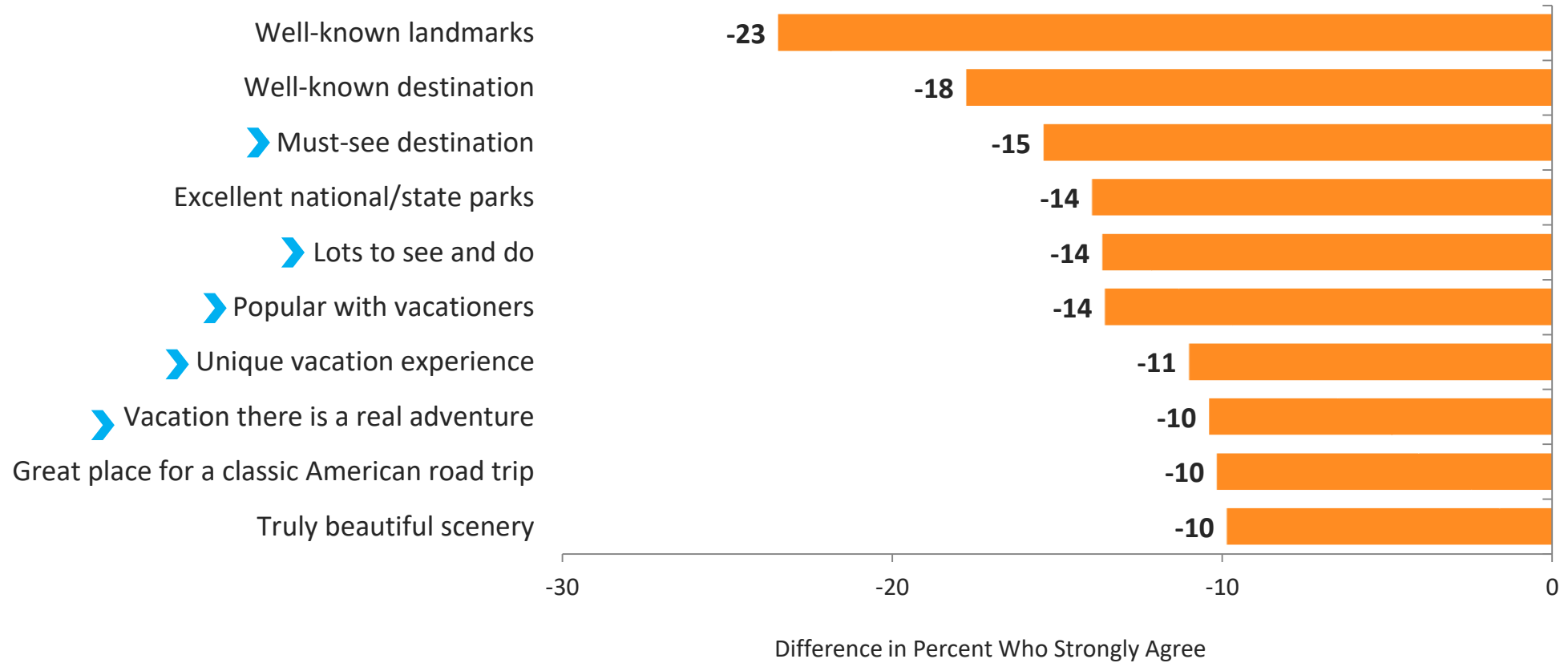




# North Dakota's Overall Image vs. Competition\*

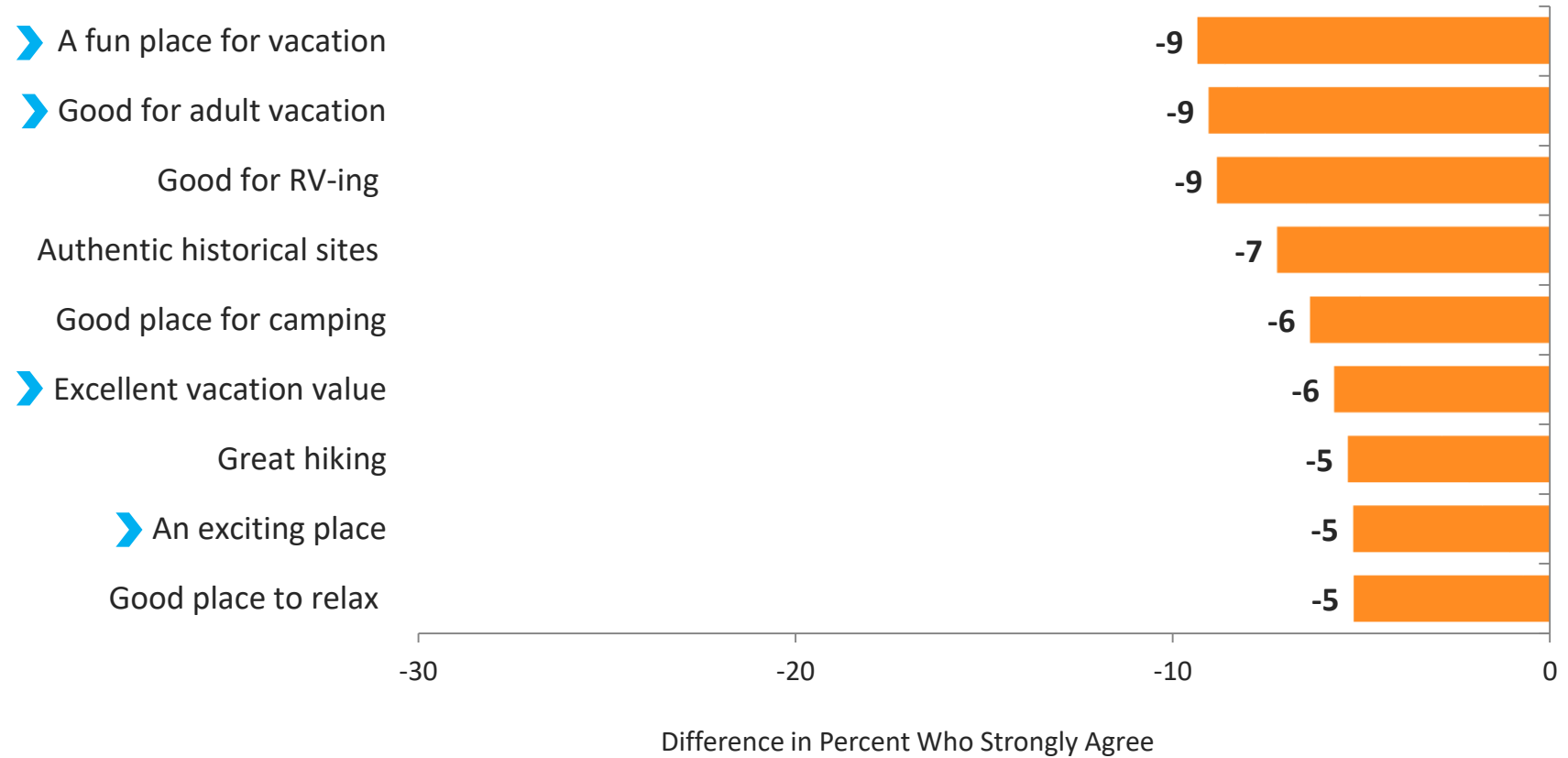


# North Dakota's Image Weaknesses vs. South Dakota



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

## North Dakota's Image Weaknesses vs. South Dakota (Cont'd)



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers



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# WHAT IS A GOOD INVESTMENT?

- Benefits
  - Communities
  - Businesses
  - Citizens
  - Governments

