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In 2019, North Dakota launched their advertising campaign in key out-of-state markets. The campaign consisted of both traditional and online media including:

- Digital
- Television
- Print
- Out-of-home

Longwoods was engaged to conduct a program of research designed to:

- Discover the hot buttons that motivate consumers in North Dakota’s markets
- Determine North Dakota’s strengths and weaknesses compared to its competition
- Leverage these insights to create powerful brand messages that are in line with the priorities of North Dakota’s consumers
Research Objectives

• The objectives of the research were to measure:
  • 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;
  • North Dakota’s image versus its product delivery as inferred from the image ratings of recent North Dakota visitors;
  • The impact of visitation and ad awareness on key overall economic development drivers.
Method

- A benchmark study was conducted to measure North Dakota’s image as compared to its competitors and to measure the awareness of North Dakota’s advertising campaign.
  - A national self-completion survey of 1,000 respondents in the advertising markets, distributed as follows:
    - Chicago DMA 400
    - Wisconsin 245
    - Minnesota 235
    - Manitoba 60
    - Saskatchewan 60
  - Respondents are members of a major online consumer research panel.
  - Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
  - Sample was drawn to be proportionate to population by specific states/DMAs/provinces, age, and sex.
Method (Cont’d)

- The survey took an average of 14 minutes to complete.
- During the survey respondents were shown copies of the advertising materials. This was done at the end of the survey as not to bias earlier questions on attitudes towards North Dakota and other behavioral measures.
- The fieldwork was conducted in June 2020.
- Data were weighted on key demographic variables (age, sex, household income and household size) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific states, DMAs, and Canadian provinces.
- For a sample of this size, the confidence level is + / – 2.5%, 19 times out of 20.
- Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,000 travelers).
Conclusions and Recommendations
Conclusions and Recommendations

• Almost half of travelers in North Dakota’s core markets recalled seeing at least one North Dakota ad.

• Ad awareness was highest in Minnesota, followed by Manitoba and Wisconsin.

• People were more likely to remember a TV, digital or print ad than one of the out-of-home ads.

• The campaign was very successful at changing people’s perceptions and overall image of North Dakota as a travel destination.

• Among the destinations evaluated in this study, North Dakota has a less positive overall image among travelers than South Dakota, Minnesota, Wyoming, Montana, and Manitoba. However, North Dakota had a more positive rating than Nebraska.

• Comparing the image ratings of people who have never visited North Dakota versus the ratings of those who have visited in the past two years creates a measure of “product delivery”, i.e., the relative satisfaction of the two groups. This report demonstrates that travelers who have experienced North Dakota recently rated the state higher on many attributes tied to leisure travel destination selection, and there were no areas where visitors felt the state failed to live up to expectations.
Tourism functions as the front door for economic development. As North Dakota continues to be successful via tourism advertising, people view North Dakota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire.

- The advertising has a positive effect on image before people even arrive, which is compounded through experiencing the North Dakota product.

- Tourism advertising can help drive economic development. It is the most visible and most cost-effective tool the region has of reaching those people who can be motivated to consider North Dakota for relocation, business building, etc.

- The ad campaign evaluated in this research did an extremely effective job of fulfilling this role.
Conclusions and Recommendations (Cont’d)

- A third of travelers in North Dakota’s core markets believe the state has a promising economic future and has a strong and expanding job market. Meanwhile, a quarter report seeing job opportunities there, think North Dakota is a place they and their families could be happy living, would consider moving there for the right job opportunity, and would recommend moving to the state to friends and family. Two in ten are interested in learning about work opportunities in the state.

- Awareness of North Dakota’s advertising lead to double digit increases in positive impressions of the state across all these economic development attributes, most notably in their impression of the state as a place they and their families would be happy living, they’d consider moving to for the right job opportunity, and willingness to recommend moving there to friends and relatives.

- Visiting North Dakota during the last two years had an even greater impact across all these attributes, especially seeing job opportunities there, perceiving North Dakota as a place they and their families would be happy living, and willingness to recommend moving there to friends and relatives.
Main Findings: Advertising Impacts
Advertising Awareness
Almost half (47%) of travelers in North Dakota’s core markets recalled seeing at least one North Dakota ad.

Ad awareness was highest in Minnesota (70%), followed by Manitoba (66%) and Wisconsin (49%).

People were more likely to remember a TV (35%), digital (33%) or print (25%) ad than one of the out-of-home (16%) ads.

The ads with the highest level of recall were:

- City TV ad (23%)
- Road trip TV ad (23%)
- History TV ad (20%)
Awareness of the Ad Campaign

Base: Residents of North Dakota’s Regional Advertising Markets

Aware* 47%

Unaware 53%

*Saw at least one ad
Awareness* by Market

Base: Residents of North Dakota’s Regional Advertising Markets

* Saw at least one ad
Advertising Awareness* by Medium

Base: Residents of North Dakota’s Regional Advertising Markets

- Aware of any ad: 47%
- TV: 35%
- Digital: 33%
- Print: 25%
- Out-of-Home: 16%

*Saw at least one ad and based on markets where shown
Awareness of Individual Ads* - TV

*Based on markets where shown
North Dakota Should Be on Your Duck Hunting Bucket List

Start planning a Legendary North Dakota waterfowl hunting trip today.
Awareness of Individual Ads* - Digital

- Any Digital: 33%
- City- Digital: 15%
- Road Trip- Digital: 14%
- TRNP- Digital: 13%
- Social Compilation 1: 13%
- Social Compilation 2: 12%
- Digital Compilation 1: 11%
- History- Digital: 11%
- Digital Compilation 2: 10%
- Outdoor Compilation: 9%

*Based on markets where shown
Print Creative (Cont’d)

Newspaper and Advertorial

Print Outdoors Niche
Awareness of Individual Ads* - Print

*Based on markets where shown
Out-of-Home Creative

Union Station Takeover

MSP OOH

Train Wrap

Union Station Out Cold
Awareness of Individual Ads* - Out-of-Home

- Any OOH: 16%
- MSP OOH: 17%
- Train Wrap: 11%
- Union Station Out Cold: 8%
- Union Station Takeover: 8%

*Based on markets where shown
Travel Guide Compilation
Awareness of Travel Guide*

- Any Travel Guide: 11%
- Travel Guide Compilation: 11%

*Based on markets where shown
Advertising Impact on Image
Advertising Impacts

• The campaign had a positive impact on travelers’ perceptions of North Dakota:
  • People exposed to the campaign gave North Dakota substantially higher rating scores than those unfamiliar with the campaign for the general overall statement “North Dakota is a place I would really enjoy visiting.”
  • For the more detailed attributes, we find that the campaign did a very good job of improving people’s perceptions of North Dakota for all of the image dimensions evaluated.

• The advertising had the greatest impact on perceptions related to:
  • I often notice advertising for this place
  • Not too far away for a vacation
  • An exciting place
  • Good place to relax
  • Great for theater and the arts
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

![Graph showing the comparison betweenAware* and Unaware with 46% and 30% respectively.](image-url)
Advertising Impact on North Dakota’s Image

- Adult Vacation: 39% Aware, 46% Unaware
- Exciting: 28% Aware, 40% Unaware
- Unique: 35% Aware, 46% Unaware
- Family Atmosphere: 36% Aware, 47% Unaware
- Sightseeing: 24% Aware, 44% Unaware
- Popular: 39% Aware, 44% Unaware
- Worry Free: 24% Aware, 46% Unaware
- Entertainment: 34% Aware, 46% Unaware
- Sports and Recreation: 24% Aware, 43% Unaware
- Affordable: 38% Aware, 50% Unaware

Percent Who Strongly Agree

Aware
Unaware
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Difference in Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I often notice advertising for this place</td>
<td>26</td>
</tr>
<tr>
<td>Not too far away for a vacation</td>
<td>18</td>
</tr>
<tr>
<td>An exciting place</td>
<td>14</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>14</td>
</tr>
<tr>
<td>Great for theater and the arts</td>
<td>13</td>
</tr>
<tr>
<td>Must-see destination</td>
<td>12</td>
</tr>
<tr>
<td>A fun place for vacation</td>
<td>12</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
<td>12</td>
</tr>
<tr>
<td>Well-known destination</td>
<td>11</td>
</tr>
<tr>
<td>Excellent fishing</td>
<td>11</td>
</tr>
<tr>
<td>Good for RV-ing</td>
<td>11</td>
</tr>
<tr>
<td>Good for families</td>
<td>11</td>
</tr>
</tbody>
</table>

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers.
Great cycling/off-road biking
- Excellent vacation value
- Unique vacation experience
- Native American Culture
- Great hiking
- Great snowmobiling
- Friendly local people
- Well-known landmarks
- Children would enjoy
- Good place for camping
- Exciting casinos
- Excellent hunting

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
Great place for a classic American road trip
- Authentic historical sites
- Good for adult vacation
- Affordable accommodations
- Excellent canoeing/kayaking/paddleboarding
- Interesting food and drink options
- Lots to see and do
- I would feel safe traveling here
- Popular with vacationers
- Truly beautiful scenery
- Good for viewing wildlife/birds
- Different cultures/ways of life

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

Difference in Percent Who Strongly Agree

*34*
Main Findings: North Dakota’s Overall Position in the Target Market
Destination
Visitation
& Interest
Previous Visitation to North Dakota

- Ever visited: 44%
- Visited in past two years: 15%
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.
Destination Hot Buttons
Respondents evaluated the image of North Dakota and six other destinations on an overall basis and on a series of additional detailed image attributes. To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:

- For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.

Then, in order to better communicate the results, the data were grouped into broader categories or factors.

For a destination in this competitive set to get on travelers’ consideration list, it must, first and foremost, be perceived to:

- Be suitable for adults and couples – which is logical, since they are paying for the vacation.
- Be exciting – being seen as exciting means being a must-see place to visit, offering many once-in-a-lifetime experiences and a real sense of fun and adventure.
There are several factors that individually are of moderate importance, but in combination define the excitement and suitability for adults that attracts vacationers to a destination:

- **Uniqueness**, including the scenery, local food, people and culture.
- A great **family atmosphere** – with things to see and do that kids would especially enjoy.
- Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, parks, historical sites, etc.
- **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising or favorable reviews?
- A safe, welcoming and **worry-free environment**.
- The opportunities for **entertainment**, e.g., dining options, theaters, casinos, and the art scene.
• Lower priorities are:
  • Sports and recreation, including water sports such as kayaking/fishing/boating, and other outdoor recreation activities.
  • Affordability.
• **Affordability** is also relatively unimportant at the wish list stage:
  • But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
  • Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.
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

<table>
<thead>
<tr>
<th>Hot Buttons</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place for vacation</td>
</tr>
<tr>
<td>Good for adult vacation</td>
</tr>
<tr>
<td>Lots to see and do</td>
</tr>
<tr>
<td>Must-see destination</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Unique vacation experience</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
</tr>
<tr>
<td>Children would enjoy</td>
</tr>
<tr>
<td>Popular with vacationers</td>
</tr>
<tr>
<td>Excellent vacation value</td>
</tr>
</tbody>
</table>
North Dakota’s Image vs. the Competition
North Dakota’s Image

• Relative to the other destinations in the competitive set for this study, North Dakota has a less positive overall image among travelers.

• Across the markets surveyed, over a third (38%) rated North Dakota very favorably as a destination they “would really enjoy visiting.”
  • Ahead of Nebraska.
  • Behind Montana, Wyoming, South Dakota, Manitoba, and Minnesota.
North Dakota’s Image (Cont’d)

• When comparing North Dakota’s image versus the image of the combined competition, North Dakota’s two image strengths are related to:
  • Native American Culture
  • Affordable accommodations

• The top weaknesses are related to:
  • Great for boating/water sports
  • Lots to see and do
  • Excellent canoeing/kayaking/paddleboarding
  • Truly beautiful scenery
  • Excellent fishing
North Dakota Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”
North Dakota’s Overall Image vs. Competition*

- Adult Vacation
- Exciting
- Unique
- Family Atmosphere
- Sightseeing
- Popular
- Worry Free
- Entertainment
- Sports and Recreation
- Affordable

Percent Who Strongly Agree

- North Dakota
- Competitors

* Includes South Dakota, Minnesota, Wyoming, Nebraska, Montana, and Manitoba
North Dakota’s Image vs. Competition
— Adult Vacation

Percent Who Strongly Agree

Adult Vacation

- North Dakota: 43
- Competitors: 50

Good for adult vacation

- North Dakota: 43
- Competitors: 50
North Dakota’s Image vs. Competition — Adult Vacation

Percent Who Strongly Agree

- Montana: 56
- Wyoming: 55
- Minnesota: 52
- South Dakota: 52
- Manitoba: 52
- North Dakota: 43
- Nebraska: 32
North Dakota’s Image vs. Competition
— Exciting

<table>
<thead>
<tr>
<th>Feature</th>
<th>North Dakota</th>
<th>Competitors</th>
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</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>34</td>
<td>42</td>
</tr>
<tr>
<td>A fun place for vacation</td>
<td>38</td>
<td>46</td>
</tr>
<tr>
<td>Must-see destination</td>
<td>32</td>
<td>38</td>
</tr>
<tr>
<td>An exciting place</td>
<td>31</td>
<td>36</td>
</tr>
<tr>
<td>Vacation there is a real adventure</td>
<td>38</td>
<td>46</td>
</tr>
</tbody>
</table>
North Dakota’s Image vs. Competition — Exciting
North Dakota’s Image vs. Competition — Unique

- Unique
- Unique vacation experience

Percent Who Strongly Agree
- North Dakota: 41%
- Competitors: 46%

苦しון: 41

 troubles: 41

Troubles: 46

North Dakota

Competitors
North Dakota’s Image vs. Competition — Unique

- Montana: 58%
- South Dakota: 52%
- Wyoming: 51%
- Manitoba: 49%
- Minnesota: 41%
- North Dakota: 41%
- Nebraska: 26%
North Dakota’s Image vs. Competition
— Family Atmosphere

- Family Atmosphere: 42% for North Dakota, 46% for Competitors
- Children would enjoy: 37% for North Dakota, 41% for Competitors
- Good for families: 47% for North Dakota, 51% for Competitors
North Dakota’s Image vs. Competition — Family Atmosphere

Percent Who Strongly Agree

- Minnesota: 53
- Montana: 51
- Wyoming: 49
- Manitoba: 47
- South Dakota: 45
- North Dakota: 42
- Nebraska: 33
North Dakota’s Image vs. Competition — Sightseeing

- Sightseeing: 48% North Dakota, 51% Competitors
- Lots to see and do: 35% North Dakota, 46% Competitors
- Great place for a classic American road trip: 47% North Dakota, 49% Competitors
- Truly beautiful scenery: 50% North Dakota, 60% Competitors
- Excellent national/state parks: 52% North Dakota, 57% Competitors
- Authentic historical sites: 49% North Dakota, 48% Competitors
- Well-known landmarks: 41% North Dakota, 45% Competitors
- Good for RV-ing: 54% North Dakota, 56% Competitors
- Good for viewing wildlife/birds: 55% North Dakota, 57% Competitors
- Different cultures/ways of life: 38% North Dakota, 40% Competitors
- Native American Culture: 53% North Dakota, 61% Competitors
North Dakota’s Image vs. Competition — Sightseeing

Percent Who Strongly Agree

- Montana: 59
- South Dakota: 58
- Wyoming: 57
- Manitoba: 49
- Minnesota: 49
- North Dakota: 48
- Nebraska: 34
North Dakota’s Image vs. Competition
— Popular

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<th>Category</th>
<th>North Dakota</th>
<th>Competitors</th>
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<tbody>
<tr>
<td>Popular</td>
<td>32</td>
<td>36</td>
</tr>
<tr>
<td>Popular with vacationers</td>
<td>35</td>
<td>42</td>
</tr>
<tr>
<td>Well-known destination</td>
<td>33</td>
<td>41</td>
</tr>
<tr>
<td>I often notice advertising for this place</td>
<td>27</td>
<td>25</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
North Dakota’s Image vs. Competition — Popular

- South Dakota: 43
- Montana: 42
- Minnesota: 42
- Wyoming: 41
- North Dakota: 32
- Manitoba: 28
- Nebraska: 21
North Dakota’s Image vs. Competition
— Worry Free

<table>
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<tr>
<th>Perception</th>
<th>North Dakota</th>
<th>Competitors</th>
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<tbody>
<tr>
<td>Worry Free</td>
<td>52</td>
<td>54</td>
</tr>
<tr>
<td>Good place to relax</td>
<td>48</td>
<td>53</td>
</tr>
<tr>
<td>Friendly local people</td>
<td>52</td>
<td>54</td>
</tr>
<tr>
<td>I would feel safe traveling here</td>
<td>55</td>
<td>53</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree
North Dakota’s Image vs. Competition — Worry Free

Percent Who Strongly Agree

- Montana: 59
- Wyoming: 56
- Manitoba: 54
- South Dakota: 54
- North Dakota: 52
- Minnesota: 50
- Nebraska: 48
North Dakota’s Image vs. Competition
— Entertainment

- Entertainment
  - North Dakota: 30
  - Competitors: 32

- Interesting food and drink options
  - North Dakota: 32
  - Competitors: 36

- Great for theater and the arts
  - North Dakota: 25
  - Competitors: 29

- Exciting casinos
  - North Dakota: 30
  - Competitors: 32
North Dakota’s Image vs. Competition
— Entertainment

- Minnesota: 43%
- Manitoba: 34%
- Montana: 33%
- North Dakota: 30%
- Nebraska: 27%
- Wyoming: 26%
- South Dakota: 26%
North Dakota’s Image vs. Competition — Sports & Recreation

- Sports and Recreation: 48% North Dakota, 53% Competitors
- Good place for camping: 55% North Dakota, 60% Competitors
- Great hiking: 52% North Dakota, 56% Competitors
- Great cycling/off-road biking: 44% North Dakota, 46% Competitors
- Excellent canoeing/kayaking/paddleboarding: 40% North Dakota, 51% Competitors
- Excellent fishing: 45% North Dakota, 55% Competitors
- Great for boating/water sports: 35% North Dakota, 45% Competitors
- Excellent hunting: 55% North Dakota, 56% Competitors
- Great snowmobiling: 54% North Dakota, 55% Competitors
North Dakota’s Image vs. Competition — Sports & Recreation

- Minnesota: 62%
- Montana: 60%
- Wyoming: 55%
- Manitoba: 55%
- South Dakota: 49%
- North Dakota: 48%
- Nebraska: 35%
Affordable

Excellent vacation value

Affordable accommodations

Not too far away for a vacation

Percent Who Strongly Agree
North Dakota’s Image vs. Competition — Affordable
North Dakota’s Image Strengths vs. Competition

Native American Culture: 8
Affordable accommodations: 5

Difference in Percent Who Strongly Agree
Great for boating/water sports

-11

Lots to see and do

-11

Excellent canoeing/kayaking/paddleboarding

-10

Truly beautiful scenery

-10

Excellent fishing

-9

Vacation there is a real adventure

-9

Well-known destination

-8

A fun place for vacation

-8

Popular with vacationers

-8

Good for adult vacation

-7

Must-see destination

-7

An exciting place

-6

Unique vacation experience

-5

Excellent national/state parks

-5

Good place to relax

-5

Good place for camping

-5

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota’s Product Delivery
When we compare the image ratings of people who have never visited North Dakota versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.

From this analysis we find that people who have experienced North Dakota recently were especially impressed with:

- Not too far away for a vacation
- I often notice advertising for this place
- Good for families
- Exciting casinos
- Friendly local people
- A fun place for a vacation

Among the dimensions evaluated, there are no areas where visitors felt North Dakota failed to live up to expectations.
North Dakota’s Product vs. Image

- Adult Vacation: 56% Recent Visitors, 45% Never Visited
- Exciting: 45% Recent Visitors, 39% Never Visited
- Unique: 46% Recent Visitors, 37% Never Visited
- Family Atmosphere: 61% Recent Visitors, 37% Never Visited
- Sightseeing: 58% Recent Visitors, 45% Never Visited
- Popular: 47% Recent Visitors, 47% Never Visited
- Worry Free: 65% Recent Visitors, 27% Never Visited
- Entertainment: 57% Recent Visitors, 27% Never Visited
- Sports and Recreation: 63% Recent Visitors, 45% Never Visited
- Affordable: 63% Recent Visitors, 38% Never Visited

* Visited in the past 2 years
North Dakota’s Product Strengths vs. Image

- Not too far away for a vacation: 41
- I often notice advertising for this place: 36
- Good for families: 27
- Exciting casinos: 27
- Friendly local people: 22
- A fun place for vacation: 21
- Children would enjoy: 21
- Native American Culture: 20
- Authentic historical sites: 18
- Good for RV-ing: 18
- Interesting food and drink options: 18
- Well-known landmarks: 18

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota’s Product Strengths vs. Image (Cont’d)

- Affordable accommodations
- Good for adult vacation
- Excellent vacation value
- Great place for a classic American road trip
- Great snowmobiling
- Excellent fishing
- I would feel safe traveling here
- Well-known destination
- Good place for camping
- Good place to relax
- Lots to see and do
- An exciting place

*Attributes marked with a chevron indicate some of the most important image hot buttons for travelers*
North Dakota’s Product Strengths vs. Image (Cont’d)

- Excellent hunting: 14
- Great for theater and the arts: 13
- Great cycling/off-road biking: 10
- Popular with vacationers: 10
- Good for viewing wildlife/birds: 10
- Must-see destination: 10
- Vacation there is a real adventure: 10
- Great hiking: 9
- Unique vacation experience: 9
- Excellent national/state parks: 9
- Excellent canoeing/kayaking/paddleboarding: 8
- Truly beautiful scenery: 7

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
THERE WERE NO SIGNIFICANT PERCEIVED PRODUCT WEAKNESSES VS. IMAGE
North Dakota’s Economic Development Image
Halo Effect Analysis

• Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers’ image of destinations as a place for leisure travel and recreation.

• Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for North Dakota from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing North Dakota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?

• Longwoods International has conducted this research for multiple state and city destinations across the U.S. since 2014.
Halo Effect Analysis

- The research compared consumers’ ratings of North Dakota on economic development image attributes by those who hadn’t seen the campaign or visited North Dakota with those who did see the tourism ads and/or visited.
- In every case, North Dakota’s tourism advertising and subsequent visitation significantly improved the image of North Dakota for a wide range of economic development objectives.
- Specifically, the North Dakota tourism advertising campaign created especially strong image lift in their perceptions of the state as a good place to start a business, go to college, and start a career.
- Actual visitation produced an overall positive effect on people’s image of North Dakota, especially on North Dakota being a good place to go to college and start a career and business.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and visited North Dakota, with the highest differences in the perception of the state as a good place to start a career, go to college, and start a business.
Impact of *Tourism Ad Awareness* on North Dakota’s Economic Development Image

- A good place to live: 37%
- A good place to start a career: 33%
- A good place to start a business: 36%
- A good place to attend college: 36%
- A good place to purchase a vacation home: 26%
- A good place to retire: 31%

Percent Who Strongly Agree

- Aware
- Unaware
A good place to live
A good place to start a career
A good place to start a business
A good place to attend college
A good place to purchase a vacation home
A good place to retire
Percent Who Strongly Agree

Past Visitor
Never Visited

Impact of Visitation on North Dakota’s Economic Development Image
Impact of Ad Awareness plus Visitation on North Dakota’s Economic Development Image

- A good place to live: 21 Aware + Visitor, 47 Percent Increment
- A good place to start a career: 16 Aware + Visitor, 50 Percent Increment
- A good place to start a business: 19 Aware + Visitor, 50 Percent Increment
- A good place to attend college: 18 Aware + Visitor, 50 Percent Increment
- A good place to purchase a vacation home: 18 Aware + Visitor, 34 Percent Increment
- A good place to retire: 21 Aware + Visitor, 39 Percent Increment
Economic Development Attributes
Economic Development Attributes

• A third of travelers in North Dakota’s core markets believe the state has a promising economic future (34%) and has a strong and expanding job market (32%). Meanwhile, a quarter report seeing job opportunities there (27%), think North Dakota is a place they and their families could be happy living (25%), would consider moving there for the right job opportunity (22%), and would recommend moving to the state to friends and family (22%). Two in ten (19%) are interested in learning about work opportunities in the state.

• Awareness of North Dakota’ advertising lead to double digit increases in positive impressions of the state across all these economic development attributes, most notably in their impression of the state as a place they and their families would be happy living, they’d consider moving to for the right job opportunity, and willingness to recommend moving there to friends and relatives.

• Visiting North Dakota during the last two years had an even greater impact across all these attributes, especially seeing job opportunities there, perceiving North Dakota as a place they and their families would be happy living, and willingness to recommend moving there to friends and relatives.
North Dakota’s Economic Development Attributes

- A place with a promising economic future: 34%
- A place with a strong and expanding job market: 32%
- I’ve seen job opportunities located here: 27%
- A place my family and I could be happy living: 25%
- I’d consider moving there for the right job opportunity: 22%
- I’d recommend moving here to friends/family: 22%
- I’m interested in learning about work opportunities here: 19%
Impact of Advertising Awareness* on North Dakota’s Economic Development Attributes

- A place with a promising economic future: 39% Aware, 28% Unaware
- A place with a strong and expanding job market: 37% Aware, 26% Unaware
- I’ve seen job opportunities located here: 34% Aware, 20% Unaware
- A place my family and I could be happy living: 34% Aware, 16% Unaware
- I’d consider moving there for the right job opportunity: 31% Aware, 13% Unaware
- I’d recommend moving here to friends/family: 29% Aware, 13% Unaware
- I’m interested in learning about work opportunities here: 26% Aware, 12% Unaware

* Saw at least one ad
A place with a promising economic future: 51%
A place with a strong and expanding job market: 48%
I’ve seen job opportunities located here: 52%
A place my family and I could be happy living: 46%
I’d consider moving there for the right job opportunity: 37%
I’d recommend moving here to friends/family: 41%
I’m interested in learning about work opportunities here: 35%

Percent Who Strongly Agree

* Visited in the past 2 years
Appendix: North Dakota’s Image Strengths & Weaknesses vs. Individual Competitors
North Dakota's Image Strengths vs. South Dakota

Great snowmobiling

Difference in Percent Who Strongly Agree

7
North Dakota's Image Weaknesses vs. South Dakota

- Well-known landmarks
- Well-known destination
- Must-see destination
- Excellent national/state parks
- Lots to see and do
- Popular with vacationers
- Unique vacation experience
- Vacation there is a real adventure
- Great place for a classic American road trip
- Truly beautiful scenery

* 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)

- A fun place for vacation
- Good for adult vacation
- Good for RV-ing
- Authentic historical sites
- Good place for camping
- Excellent vacation value
- Great hiking
- An exciting place
- Good place to relax

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Minnesota

- **Native American Culture**: 15
- **I would feel safe traveling here**: 14
- **Authentic historical sites**: 6
Great for boating/water sports  -35
Excellent canoeing/kayaking/paddleboarding -25
Excellent fishing -23
Great for theater and the arts -20
Not too far away for a vacation -18
Great snowmobiling -15
Lots to see and do -15
Interesting food and drink options -15
Children would enjoy -14
Well-known destination -12
Popular with vacationers -11

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Weaknesses vs. Minnesota (Cont’d)

- An exciting place
- Truly beautiful scenery
- Good for adult vacation
- A fun place for vacation
- Good place for camping
- Good for families
- Exciting casinos
- I often notice advertising for this place
- Good place to relax
- Great cycling/off-road biking

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Wyoming

Difference in Percent Who Strongly Agree

- Exciting casinos: 11
- Native American Culture: 8
- Not too far away for a vacation: 8
- Affordable accommodations: 6
North Dakota's Image Weaknesses vs. Wyoming

- Vacation there is a real adventure: -19
- Truly beautiful scenery: -19
- Excellent national/state parks: -16
- Popular with vacationers: -15
- Great place for a classic American road trip: -13
- A fun place for vacation: -13
- Well-known landmarks: -13
- Must-see destination: -13
- Well-known destination: -13
- Good for adult vacation: -12
- Excellent fishing: -11
- Good for viewing wildlife/birds: -11
- Good place for camping: -11

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Weaknesses vs. Wyoming (Cont’d)

- Lots to see and do
- Great hiking
- Unique vacation experience
- Excellent canoeing/kayaking/paddleboarding
- An exciting place
- Good for families
- Good place to relax
- Good for RV-ing
- Excellent hunting
- Different cultures/ways of life
- Great for boating/water sports
- Children would enjoy
- Excellent vacation value

Difference in Percent Who Strongly Agree

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Nebraska

- Native American Culture: 23
- Great snowmobiling: 23
- Authentic historical sites: 18
- Good for viewing wildlife/birds: 17
- Excellent national/state parks: 16
- Good place for camping: 15
- Unique vacation experience: 15
- Truly beautiful scenery: 15
- Excellent hunting: 14
- Good for RV-ing: 14
- Well-known landmarks: 14

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Nebraska (Cont'd)

- Excellent fishing: 13
- Vacation there is a real adventure: 13
- Great place for a classic American road trip: 12
- Popular with vacationers: 12
- Different cultures/ways of life: 12
- Great hiking: 12
- I often notice advertising for this place: 12
- Excellent vacation value: 11
- Good for adult vacation: 11
- Children would enjoy: 11
- Excellent canoeing/kayaking/paddleboarding: 10

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Nebraska (Cont’d)

- Must-see destination: 10
- A fun place for vacation: 10
- Affordable accommodations: 9
- Great for boating/water sports: 8
- Great cycling/off-road biking: 8
- Good for families: 8
- Well-known destination: 8
- An exciting place: 7
- Not too far away for a vacation: 6
- Exciting casinos: 6
- I would feel safe traveling here: 5

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers.
THERE WERE NO SIGNIFICANT PERCEIVED IMAGE WEAKNESSES VS. NEBRASKA
North Dakota's Image Strengths vs. Montana

Not too far away for a vacation

Difference in Percent Who Strongly Agree
North Dakota's Image Weaknesses vs. Montana (Cont’d)

- Good for viewing wildlife/birds
- Great hiking
- Good for adult vacation
- Excellent fishing
- An exciting place
- Good place to relax
- Good place for camping
- Great place for a classic American road trip
- Children would enjoy
- Great cycling/off-road biking

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Weaknesses vs. Montana (Cont’d)

- Good for RV-ing
- Interesting food and drink options
- Different cultures/ways of life
- Good for families
- Great snowmobiling
- Well-known landmarks
- Excellent vacation value
- Great for boating/water sports
- Friendly local people
- Authentic historical sites

* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers
North Dakota's Image Strengths vs. Manitoba

- Great place for a classic American road trip: 11%
- Well-known landmarks: 10%
- Affordable accommodations: 9%
- I often notice advertising for this place: 7%
- Native American Culture: 5%

Difference in Percent Who Strongly Agree
North Dakota's Image Weaknesses vs. Manitoba

Excellent fishing
Great for boating/water sports
Excellent canoeing/kayaking/paddleboarding
Vacation there is a real adventure
Truly beautiful scenery
Lots to see and do
Different cultures/ways of life
A fun place for vacation
Good for adult vacation
Great for theater and the arts
Unique vacation experience
Good place for camping
Good for families
Interesting food and drink options
Great snowmobiling

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