

N O R T H
Dakota

Be Legendary.™

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**North Dakota 2019
Image & Halo Research**

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Background and Purpose

- 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/DMA's/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 $\pm 2.5\%$, 19 times out of 20.
- Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,000 travelers).



NDSU's football dynasty has produced national championship wins for most of the past decade. Along with UND hockey, there is plenty of action for sports fans, like North Dakota native, actor Josh Duhamel. Visit us online to learn more and find hotels, dining, nightlife, arts and entertainment to complete your visit.

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Conclusions and Recommendations

Conclusions and Recommendations

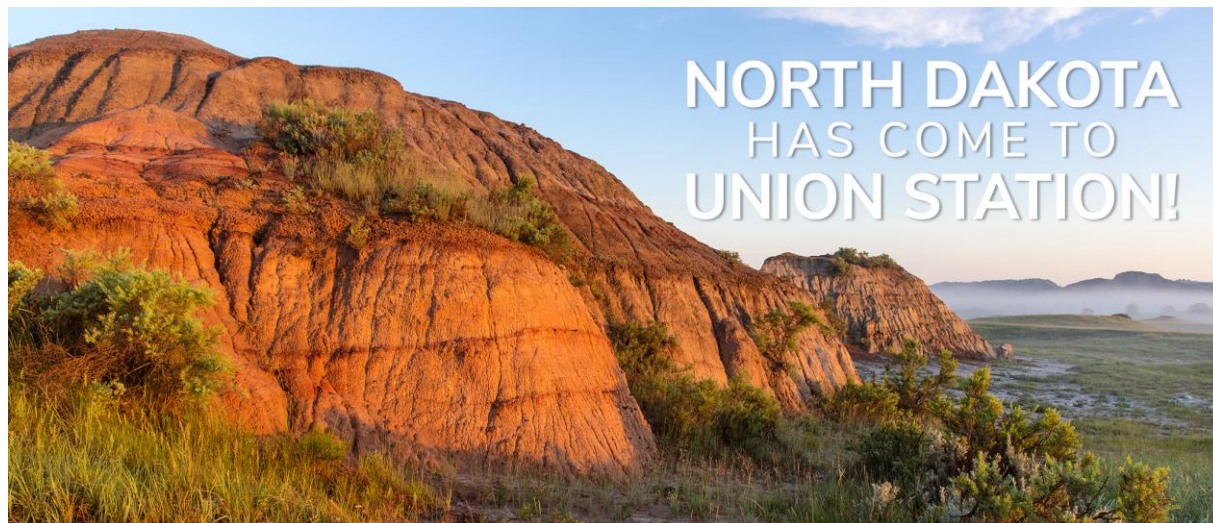
- Almost half of travelers in North Dakota's core markets recalled seeing at least one North Dakota ad.
- Ad awareness was highest in Minnesota, followed by Manitoba and Wisconsin.
- People were more likely to remember a TV, digital or print ad than one of the out-of-home ads.
- The campaign was very 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.

Conclusions and Recommendations (Cont'd)

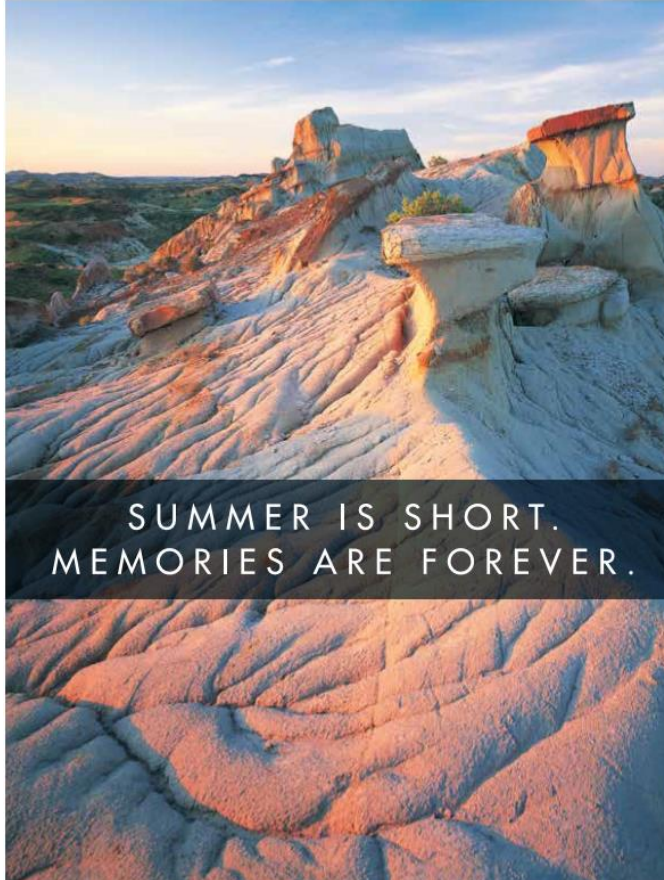
- Tourism functions as the front door for economic development. As North Dakota continues to be successful via tourism advertising, people view North Dakota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire.
 - The advertising has a positive 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



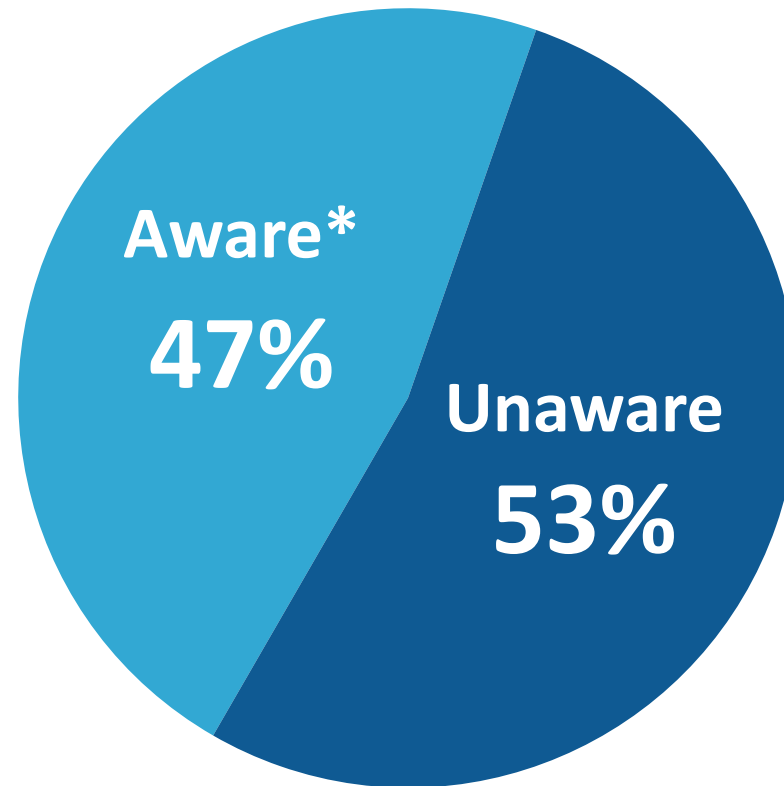
Advertising Awareness

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

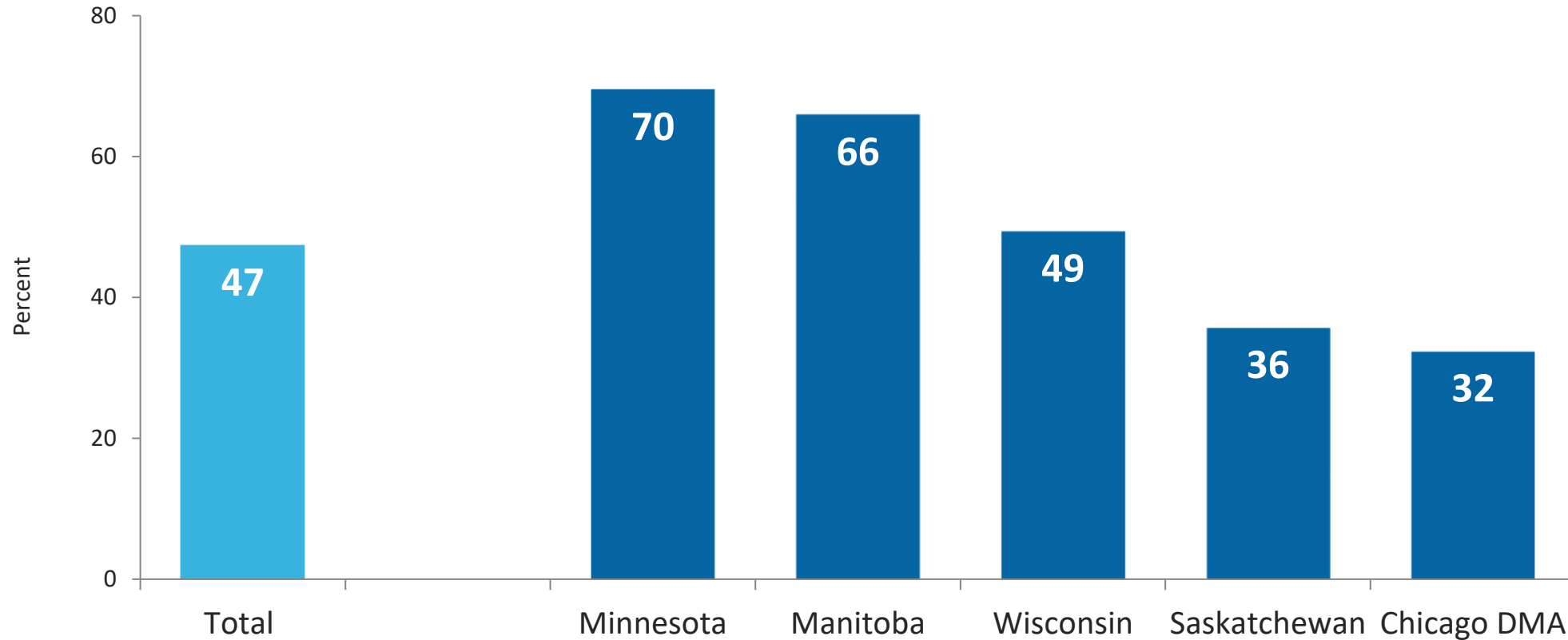
Base: Residents of North Dakota's Regional Advertising Markets



*Saw at least one ad

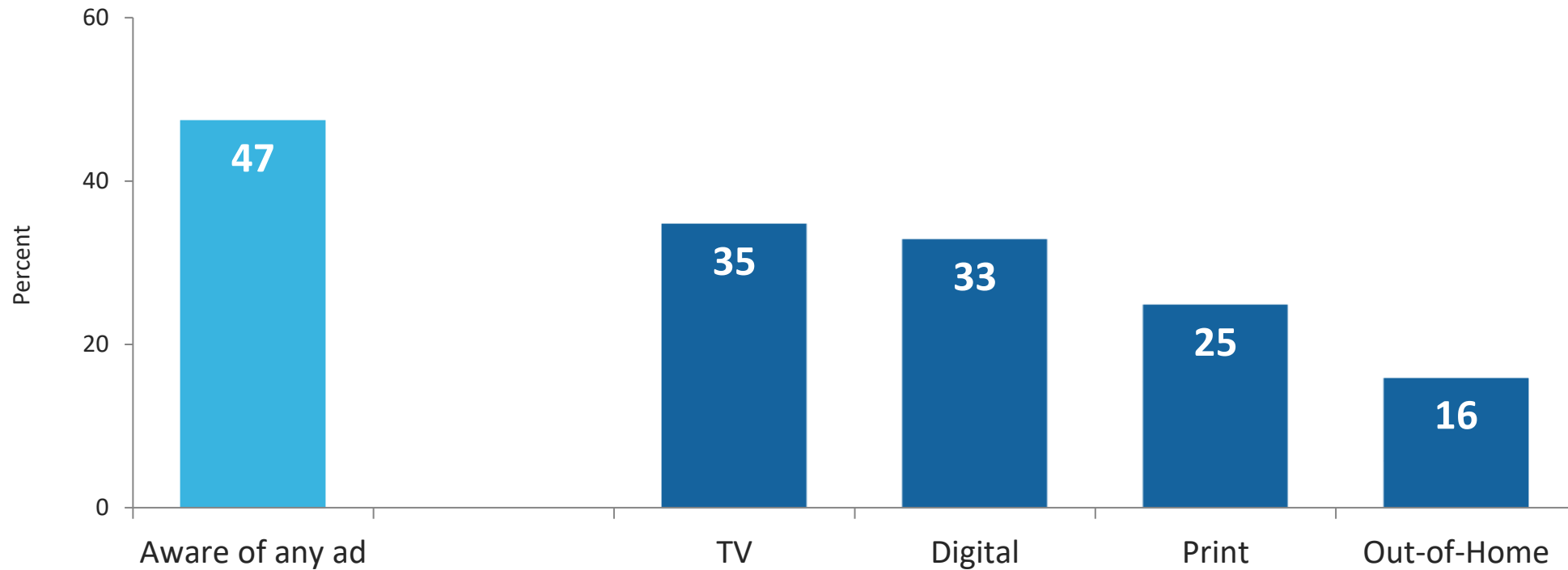
Awareness* by Market

Base: Residents of North Dakota's Regional Advertising Markets



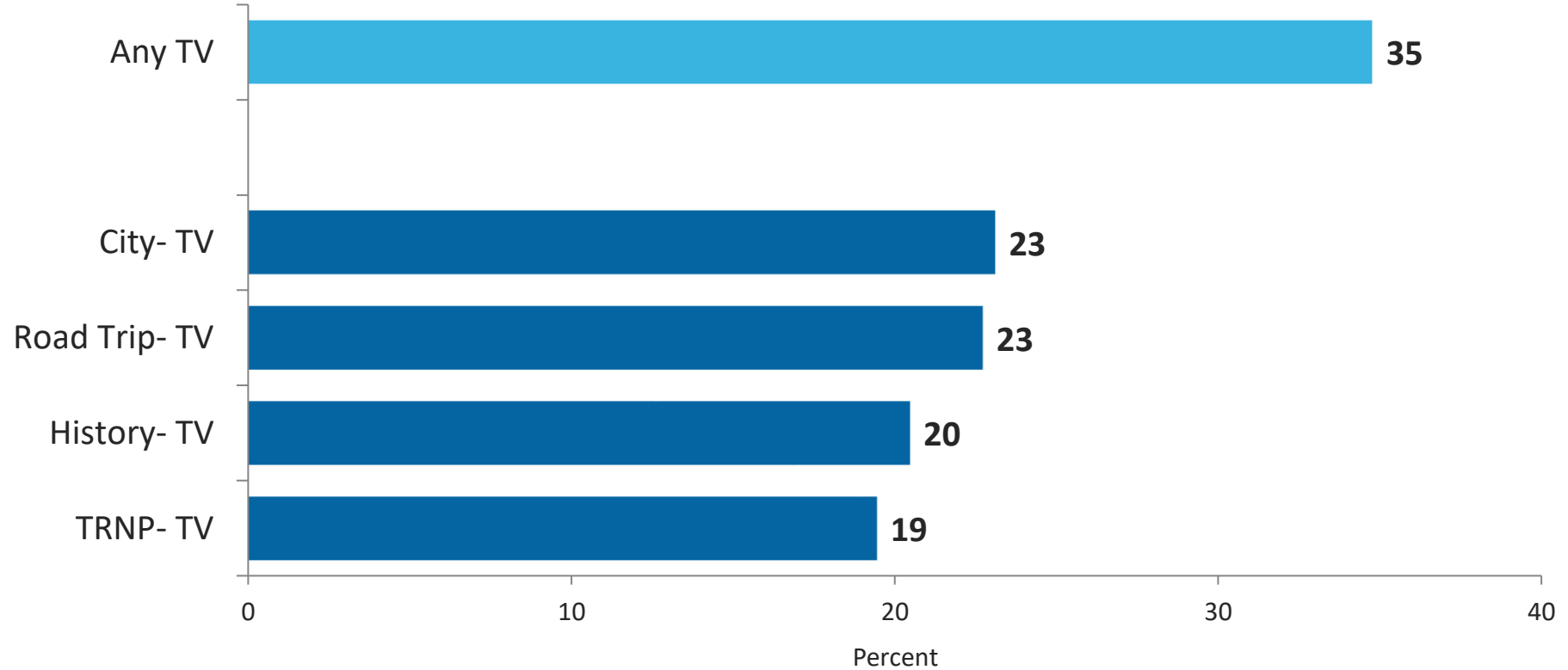
Advertising Awareness* by Medium

Base: Residents of North Dakota's Regional Advertising Markets



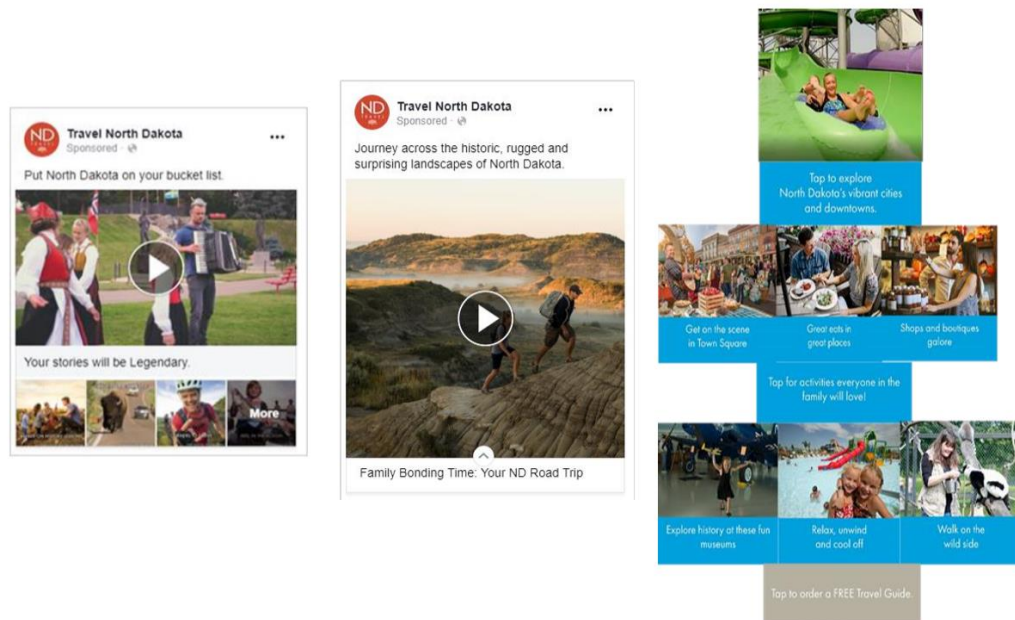
*Saw at least one ad and based on markets where shown

Awareness of Individual Ads* - TV

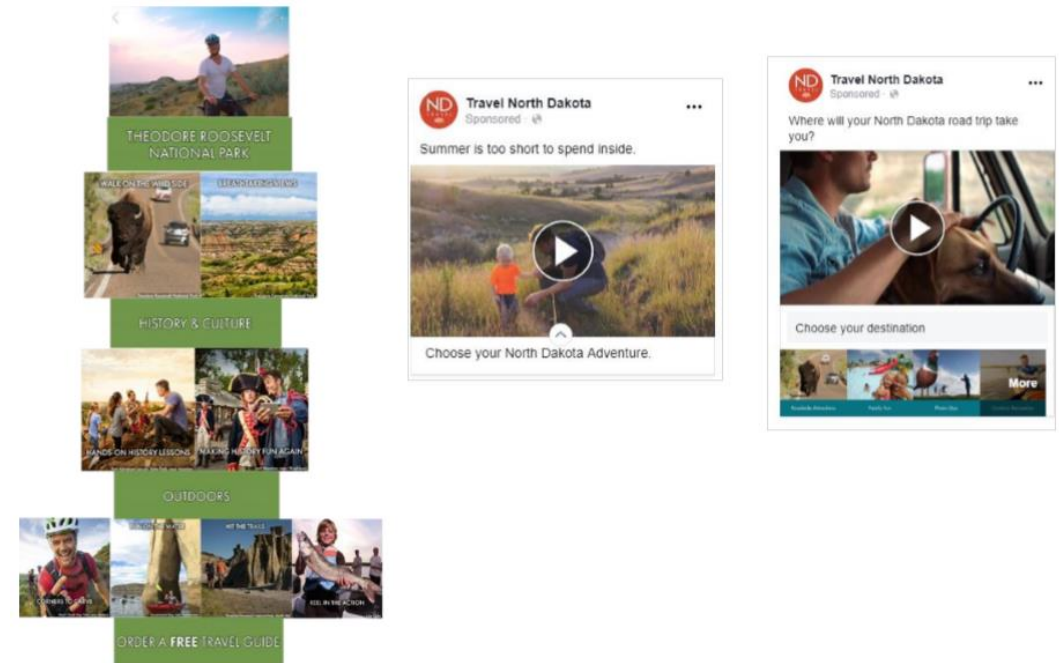


*Based on markets where shown

Digital Creative

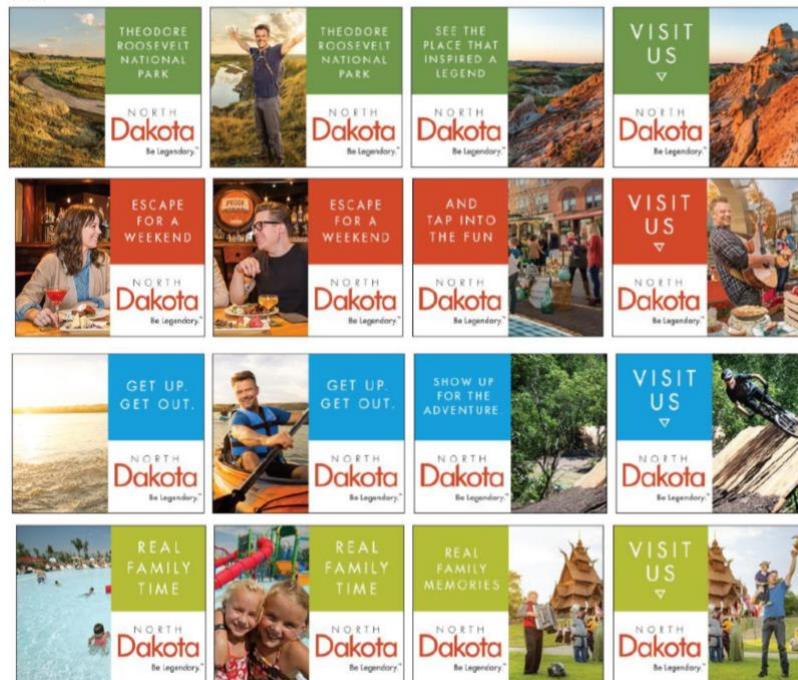


Social Compilation 1



Social Compilation 2

Digital Creative (Cont'd)



Digital Compilation 1



Digital Compilation 2

DU Under Armour Performance Tee
Yours with a donation of \$39 or more! [DONATE NOW](#)

North Dakota Should Be on Your Duck Hunting Bucket List

Start planning a Legendary North Dakota waterfowl hunting trip today

This content is a paid advertisement from North Dakota Tourism in conjunction with the DU Travel Program. Ducks Unlimited editorial staff had no role in the creation of this content.

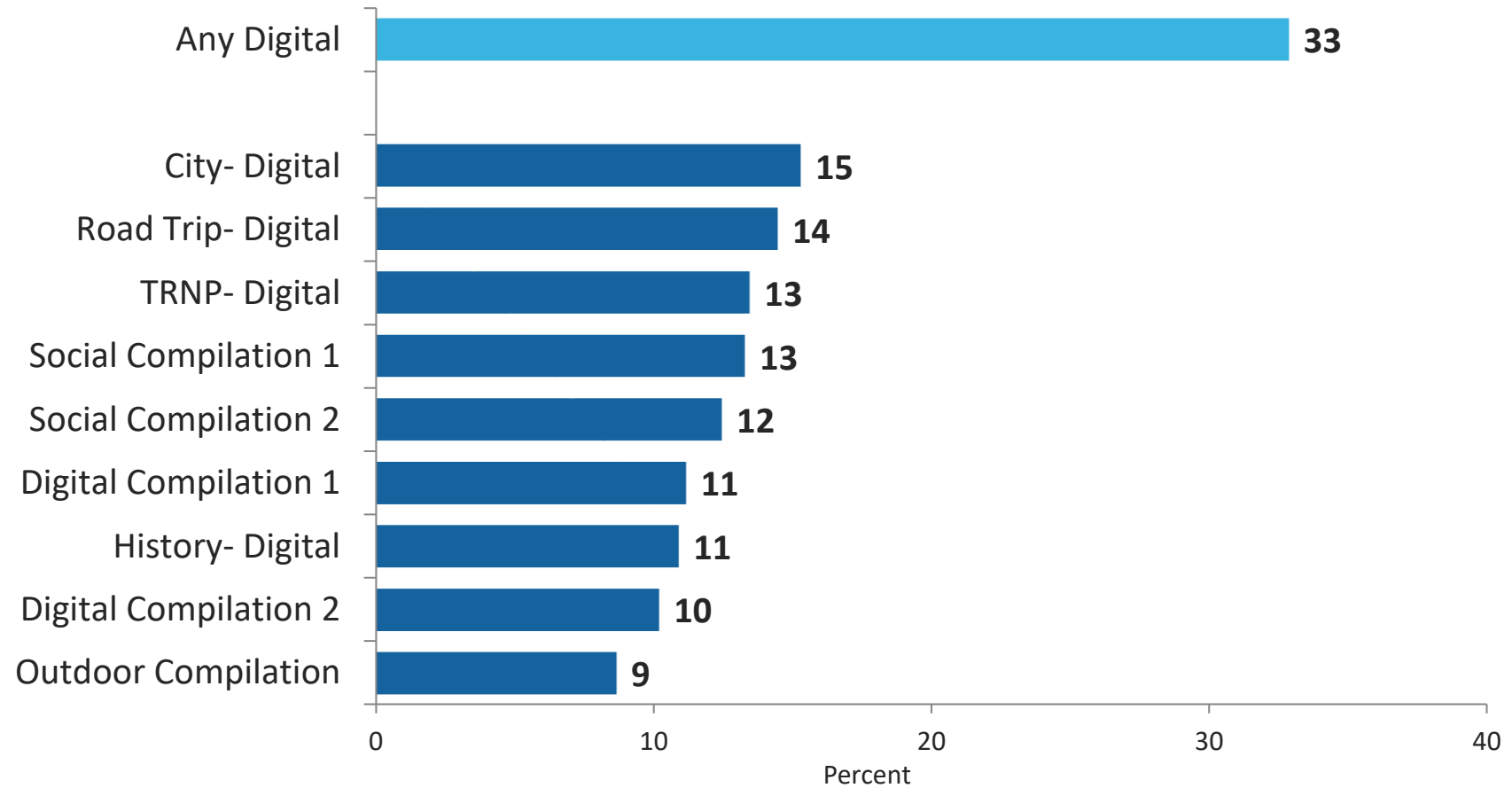
By North Dakota Tourism

FREE HUNTING GUIDE [GET IT NOW](#)

FREE HUNTING GUIDE [GET IT NOW](#)

Outdoor Compilation

Awareness of Individual Ads* - Digital



*Based on markets where shown

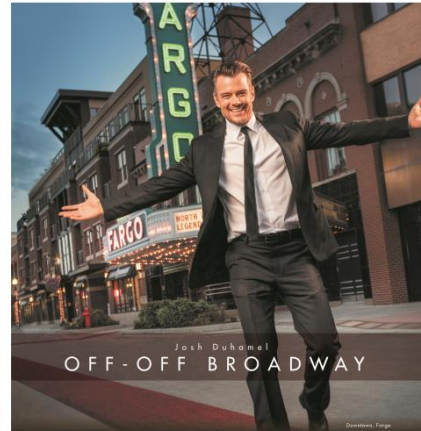
Print Creative



Sign and bike up to 1,44 miles of family-friendly to challenging terrain on the North Dakota Trail in the beautiful Badlands. In the vacation taking destination that only North Dakota native and actor Josh Duhamel can bring to life. Visit us online to learn more and plan your adventure.

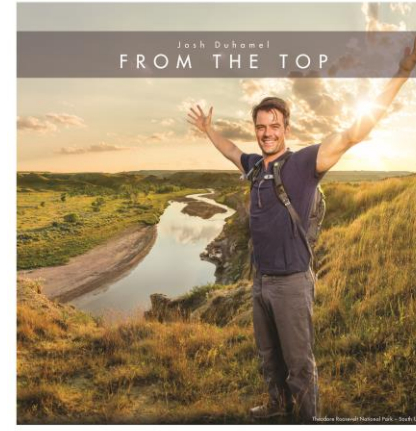
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North Dakota's growing cities and vibrant downtowns are setting the stage for your visit with a variety in arts and entertainment, shopping, dining and nightlife. They're just a few of the reasons actor Josh Duhamel keeps coming back to his home state. Visit us online to learn more and start your weekend escape.

**NORTH
Dakota**
Be Legendary.



Actor and North Dakota native Josh Duhamel has something in common with President Theodore Roosevelt: a love for the Badlands. After spending time here, Roosevelt was instrumental in starting the National Park System. Visit us online and plan your trip to beautiful Theodore Roosevelt National Park.

LegendaryND.com

**NORTH
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NDU's football dynasty has produced national championship wins for most of the past decade. Along with UND hockey, there is plenty of action for sports fans, like North Dakota native, actor Josh Duhamel. Visit us online to learn more and find hotels, dining, nightlife, arts and entertainment to complete your visit.

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We like to think that Lewis & Clark, along with Sakakawea, enjoyed a good laugh as much as anyone could in the winter of 1804. Rich history is just one reason why North Dakota native and actor Josh Duhamel returns home. Visit us online to discover Josh's favorites and start your own enjoyed adventure.

LegendaryND.com

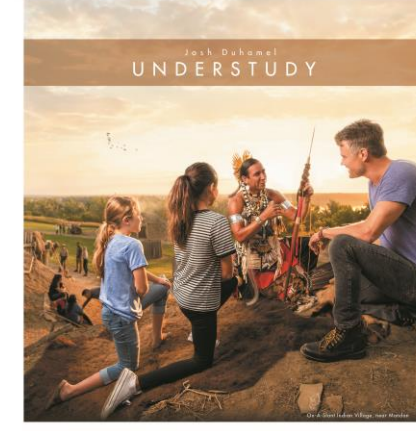
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Actor Josh Duhamel enjoys getting out of character and visiting his home state of North Dakota for authentic, on-location experiences. Join us for events like a powwow or North America's largest Scandinavian festival. Visit us online for more events, festivals and attractions and start planning today.

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**NORTH
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Actor and North Dakota native, Josh Duhamel, calls the people of his home state "inspiring." You've invited to be inspired, too. Join us for historic reenactments, international powwows and cultural festivals celebrating our diverse heritage. Visit us online to learn more and start planning today.

LegendaryND.com

**NORTH
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Let loose in the great outdoors of North Dakota. Here in his home state, actor Josh Duhamel enjoys getting outside and having fun on our rivers, lakes, hills and trails. Visit us online to find year-round outdoor adventures, and start planning today.

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Print Creative (Cont'd)

SUMMER IS QUICK, PLAN NOW

SEE INSIDE

NORTH Dakota
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SUMMER IS SHORT. MEMORIES ARE FOREVER.

THEODORE ROOSEVELT NATIONAL PARK

The park was named for the president who lived and roamed in North Dakota's Badlands in the late 1800s. This land inspired Roosevelt to do more for conservation than perhaps any other president in history. The park's three units offer both scenic drives and opportunities to experience the unspoiled American wilderness, with more than 100 miles of hiking trails, backcountry camping, wildlife viewing, and fishing on the Little Missouri River.

Theodore Roosevelt National Park's 70,000 acres of protected land are home to colorful canyons, towering buttes and sandstone pillars. Wildlife viewing is popular, with herds of bison, wild horses, elk, prairie dog towns, eagles and hundreds of bird species weaving visitors. Many also enjoy stargazing, as the park is a prime location to view the Milky Way and even catch the Northern Lights.

ADVENTURERS WANTED

Your road trip across North Dakota will truly begin in our largest city. While you're in Fargo, plan to visit local craft breweries, the Plains Art Museum and the famous Woodstock from the movie "Fargo." From there, you will head west on 940. Along the way, you'll encounter designated scenic byways, breathtaking roadside attractions, historic sites and more.

Plan a trip down the Sully River Valley National Scenic Byway from Valley City. Visit the World's Largest Buffalo at Jamestown. In the capital city area of Bismarck, see the North Dakota Heritage Center and State Museum with exhibits of Native American culture, historic life and dinosaurs. Tour the home of U.S. Col. George Custer at Fort Abraham Lincoln State Park near Mandan and enjoy the Missouri River on the Lewis and Clark Riverboat. Don't miss the Bechtel Highway, in western North Dakota, and its collection of the world's largest metal sculptures.

LEGENDARY HUNTING

Waterfowl hunting near Devils Lake

LEGENDARY HUNTING

North Dakota is home to the Central Flyway, a virtual super-highway for millions of migrating ducks and geese. Our rivers, lakes and wetlands stretch far and wide, offering premier waterfowl habitat. Come experience it for yourself. With duck numbers well above long-term averages, you'll have the hunt of a lifetime. Plan your trip and accommodations at legendaryND.com.

WHERE TO HUNT

Find world-class waterfowl hunting in central to east-central North Dakota. Favorite areas include the Missouri River corridor and the Prairie Potholes region between Highway 3 and the Sheyenne River/Devils Lake basin. Access is easy with our PLOTS (Private Lands Open to Sportsmen), wildlife management areas and waterfowl production areas.

SPECIES

Every migration season, the skies, fields and wetlands of North Dakota welcome vast flocks of Canada geese, white-fronted geese and light geese. Duck species are abundant, with mixed limits on mallards, gadwall, scaup, wood ducks, redheads, pintails, canvasbacks, blue-winged teal and mergansers. With a large variety of duck species, the migration provides a long, productive hunting season. Last year's breeding duck index was 17 percent above the long-term average — and mallards alone were 63 percent above.

SEASONS

North Dakota's regular seasons for waterfowl typically begin in late September, with an early season for Canada geese opening in August. Official dates become available in August. Find details and online licensing at: gnd.gov/hunting.

LEGENDARY HUNTING

Call for your free Hunting and Fishing Guide today.
1-800-435-5663

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Visit us at legendaryND.com or call 1-800-435-5663 to order your free North Dakota Travel Guide and state map.

ADVERTORIAL

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LEGENDARY HUNTING

Call for your free Hunting and Fishing Guide today.
1-800-435-5663

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Visit us at legendaryND.com or call 1-800-435-5663 to order your free North Dakota Travel Guide and state map.

ADVERTORIAL

CATCHING

North Dakota native, actor Jack Duhamel, Devil's Lake

A day spent fishing is never wasted. A day spent getting strikes on your line is even better. Welcome to fishing in North Dakota. With more than 400 lakes and rivers and a year-round fishing season, it's a great place to keep your reel busy with walleye, perch, bass and northern pike. Cast your line in North Dakota and get ready to reel in a great time.

WORLD-CLASS FISHING

North Dakota's largest natural lake is Devils Lake. Along with Lake Sakakawea and Lake Oahe, they provide fishing good enough to attract tournaments with America's top professional walleye anglers. You can feed your competitive side at tournaments like the Governor's Cup and the Devils Lake Ice Fishing Tournament.

LEGENDARY HUNTING

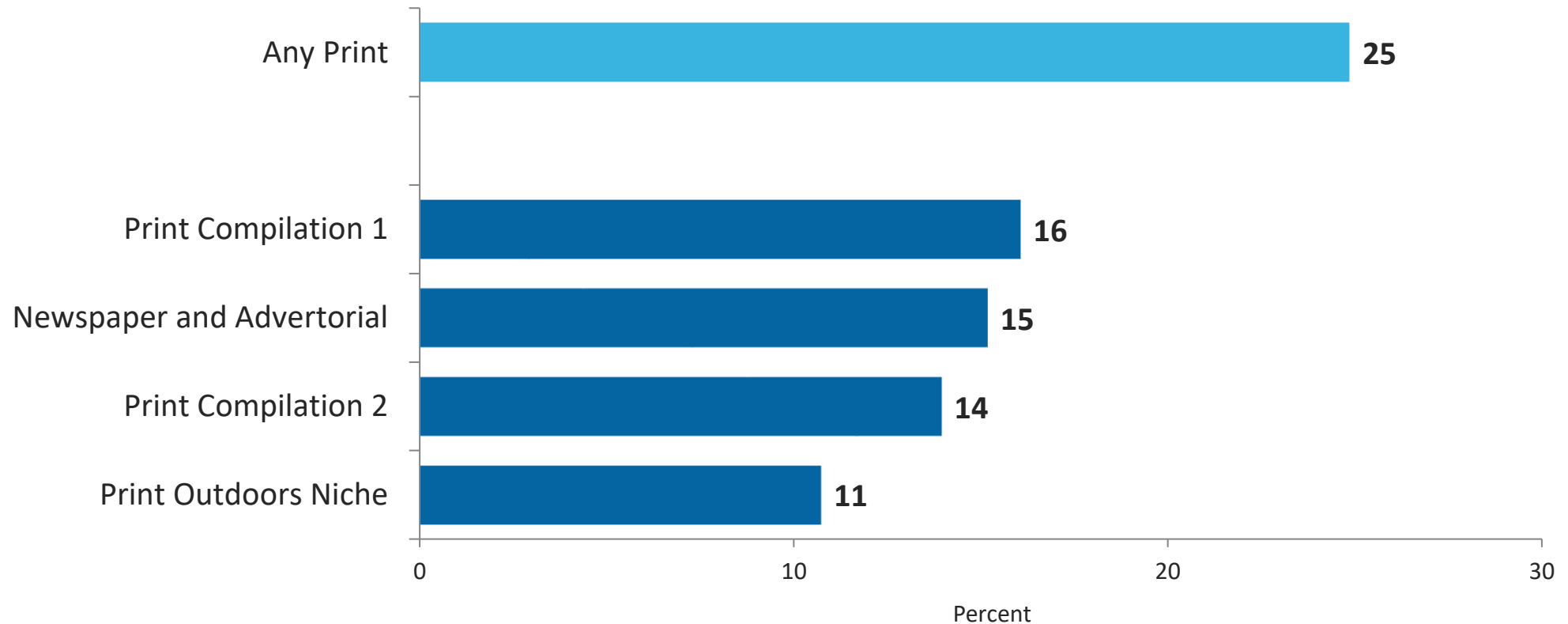
Call for your free hunting and fishing guide today.
1-800-435-5663

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Newspaper and Advertorial

Print Outdoors Niche

Awareness of Individual Ads* - Print



*Based on markets where shown

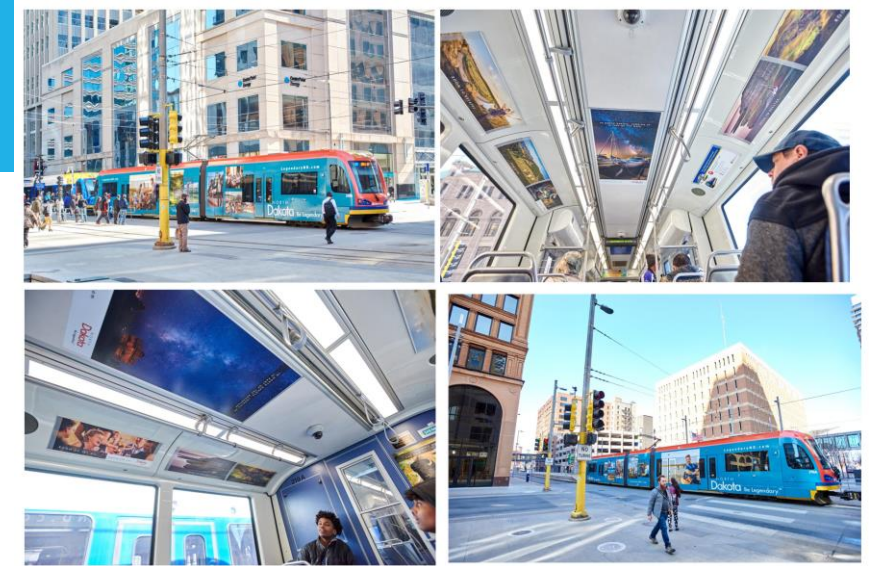
Out-of-Home Creative



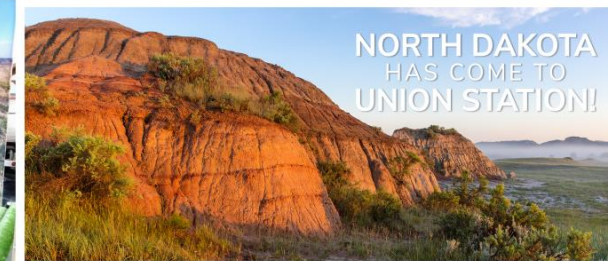
Union Station Takeover



MSP OOH

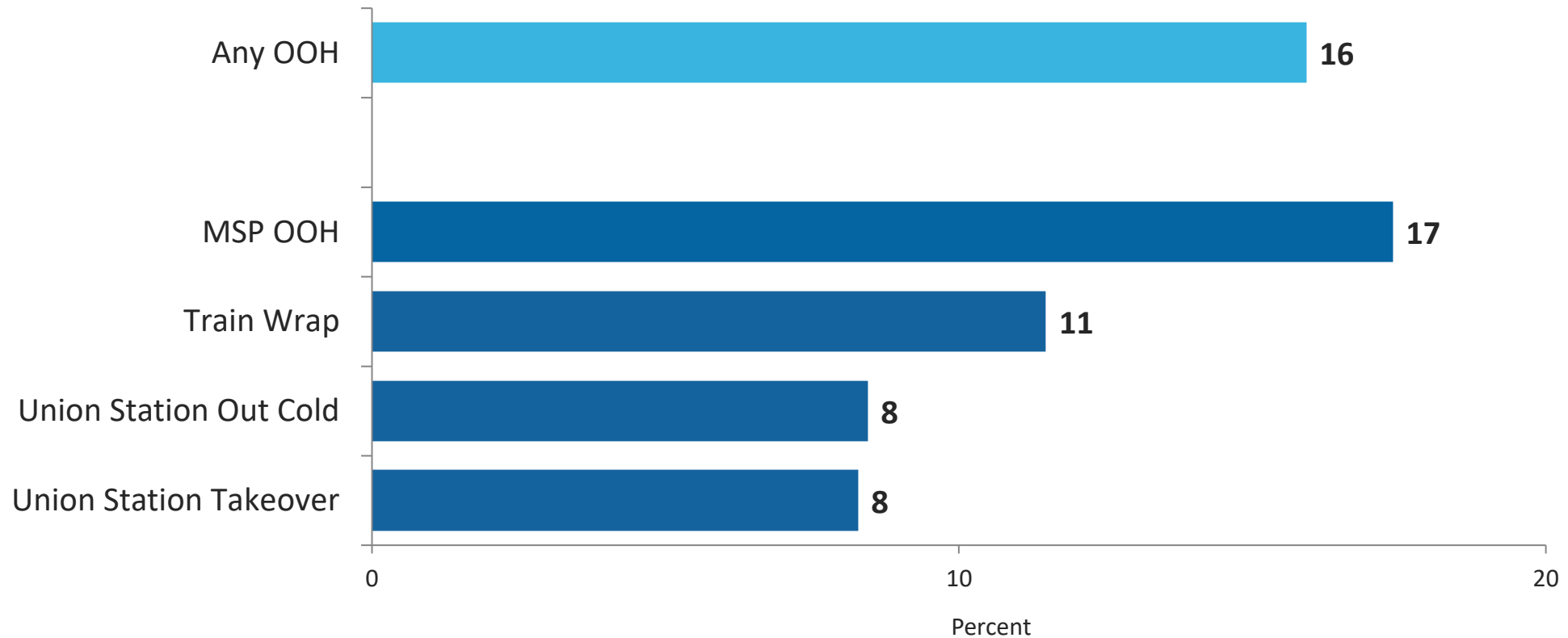


Train Wrap



Union Station Out Cold

Awareness of Individual Ads* - Out-of-Home



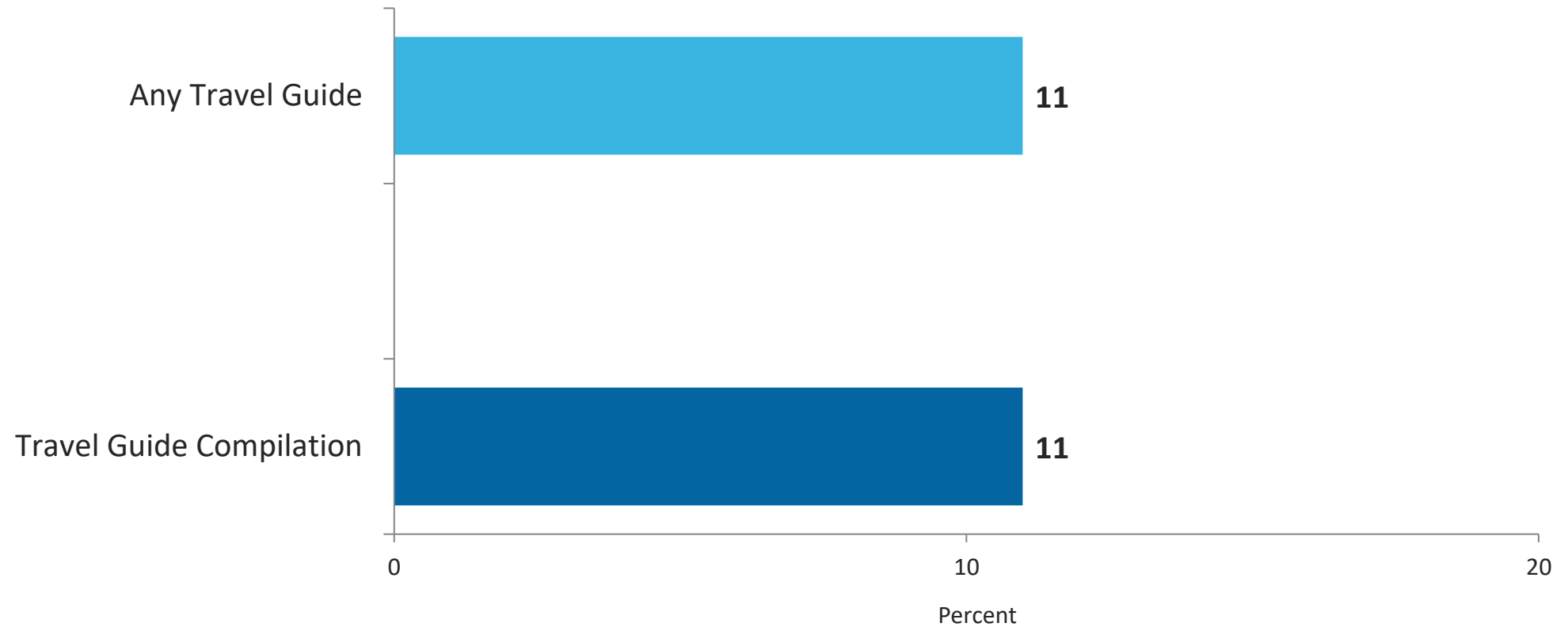
*Based on markets where shown

Travel Guide Creative

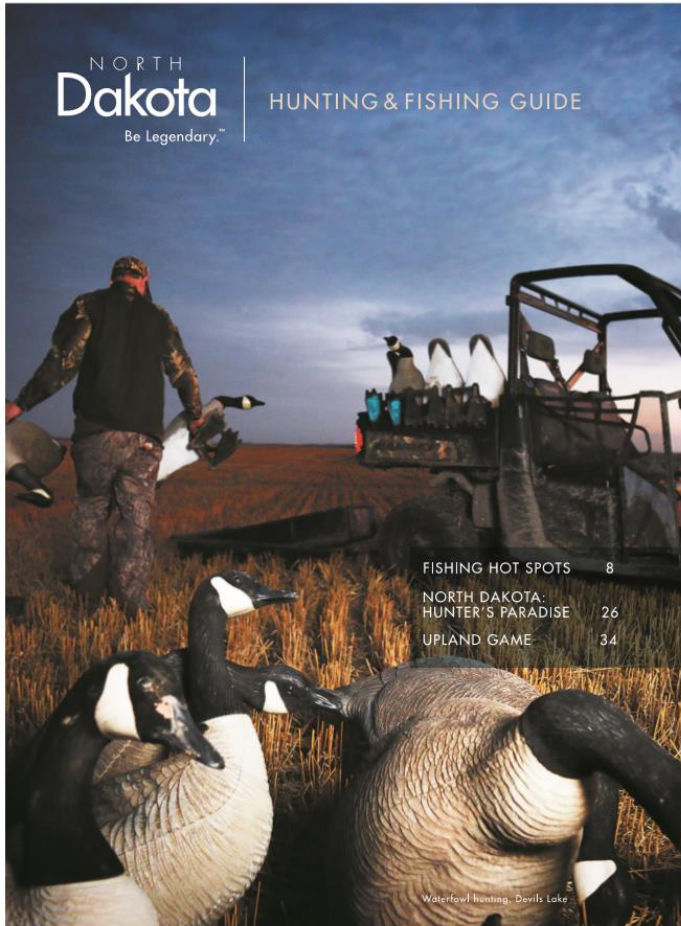


Travel Guide Compilation

Awareness of Travel Guide*



*Based on markets where shown



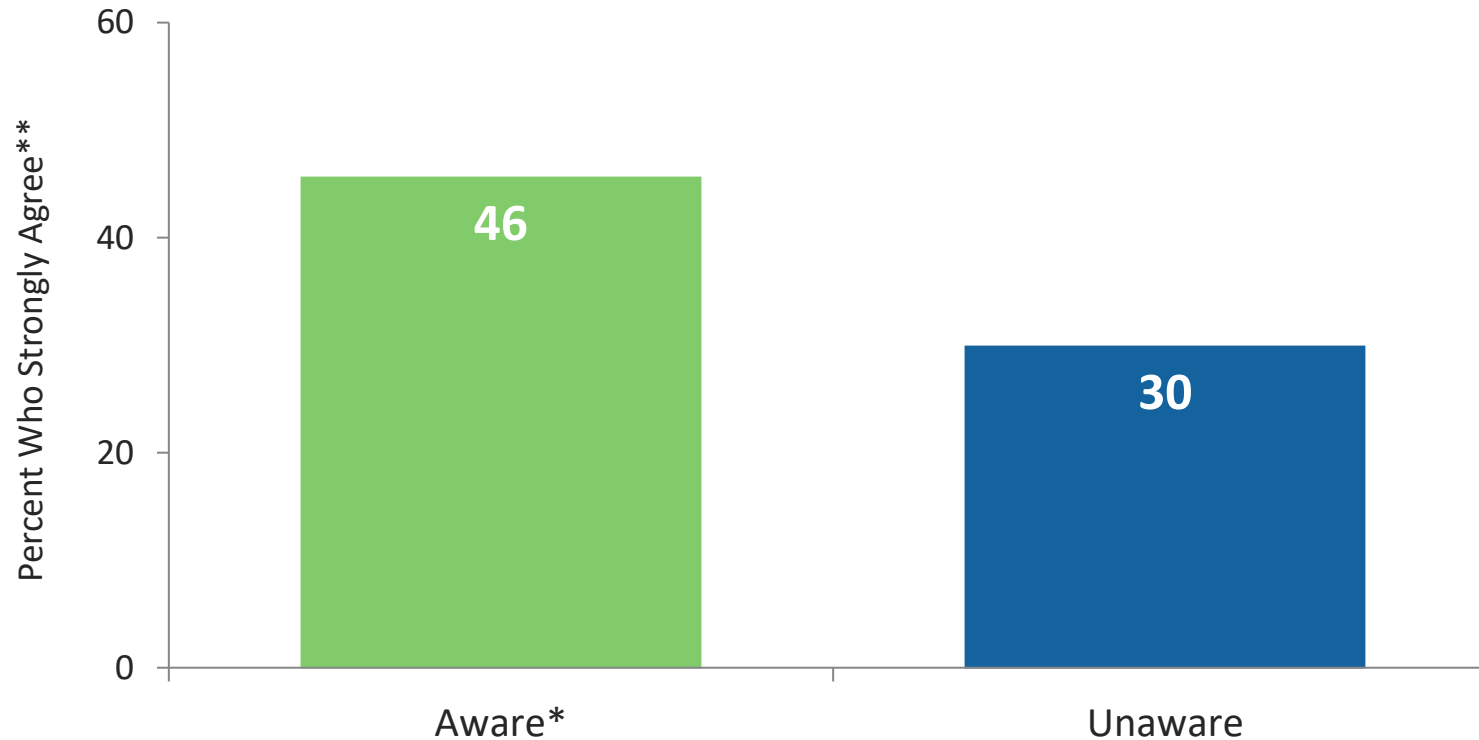
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Advertising Impact on Image

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

Advertising Impact on North Dakota's Image

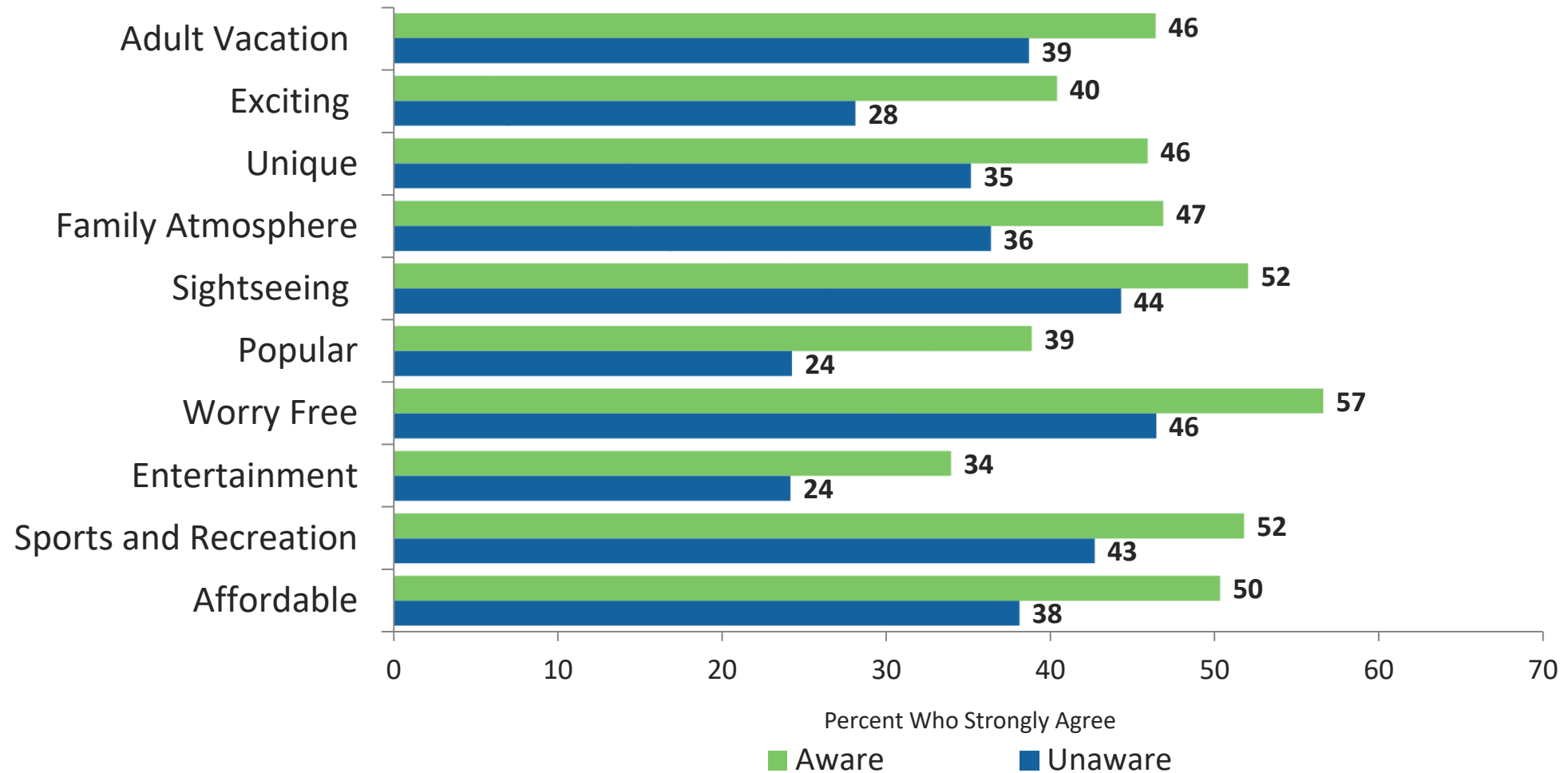
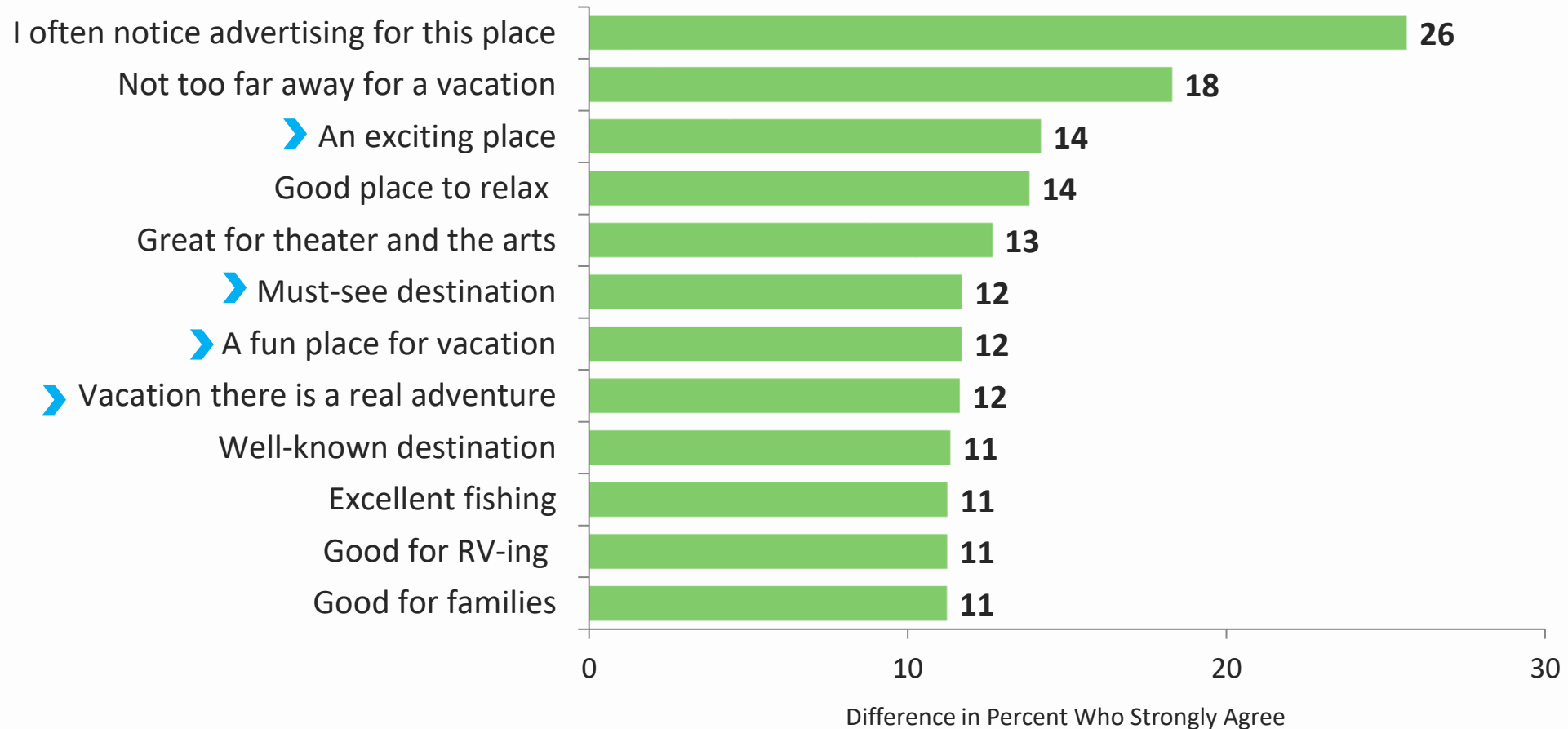
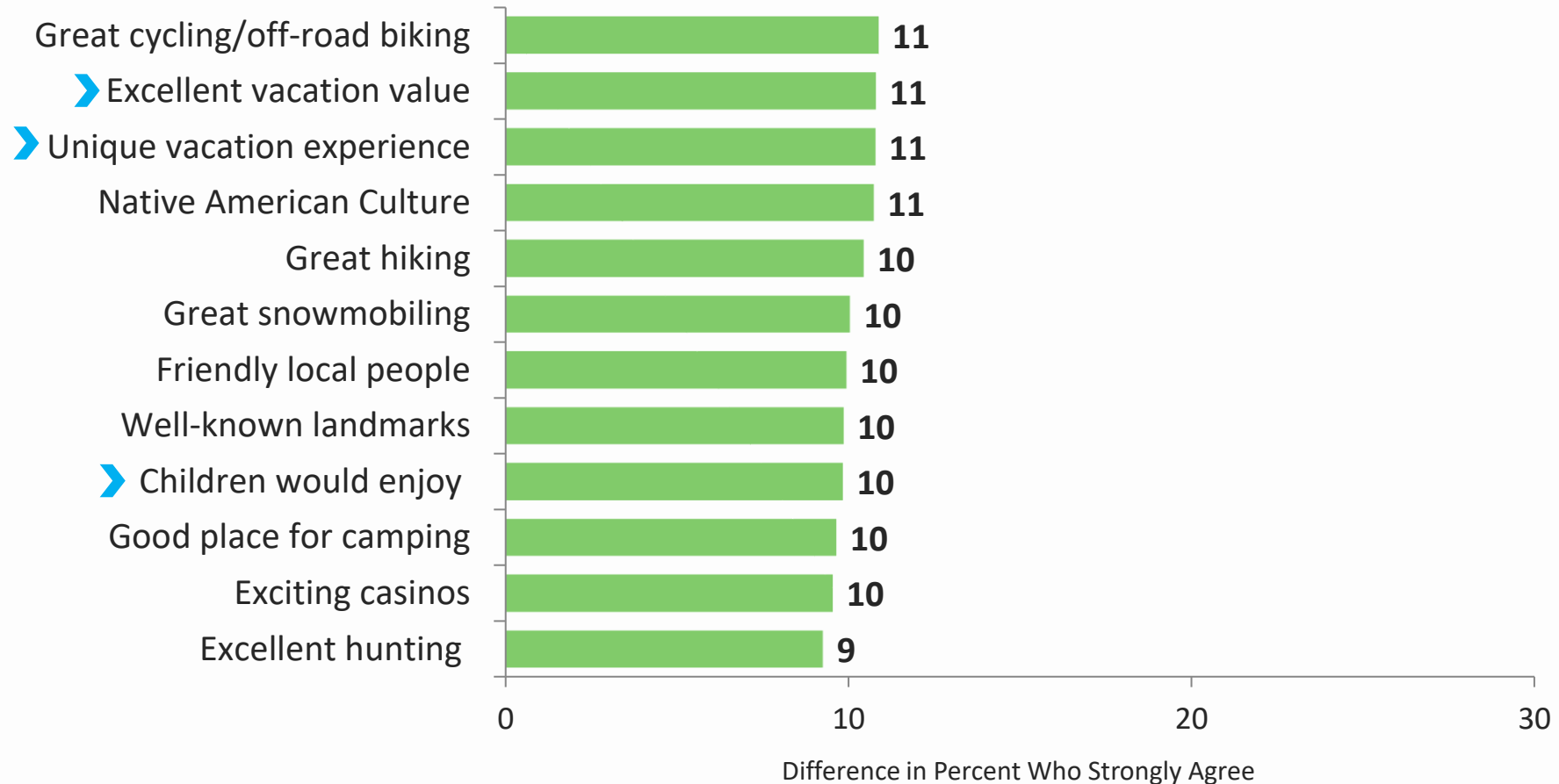


Image Attributes Most Impacted by Advertising



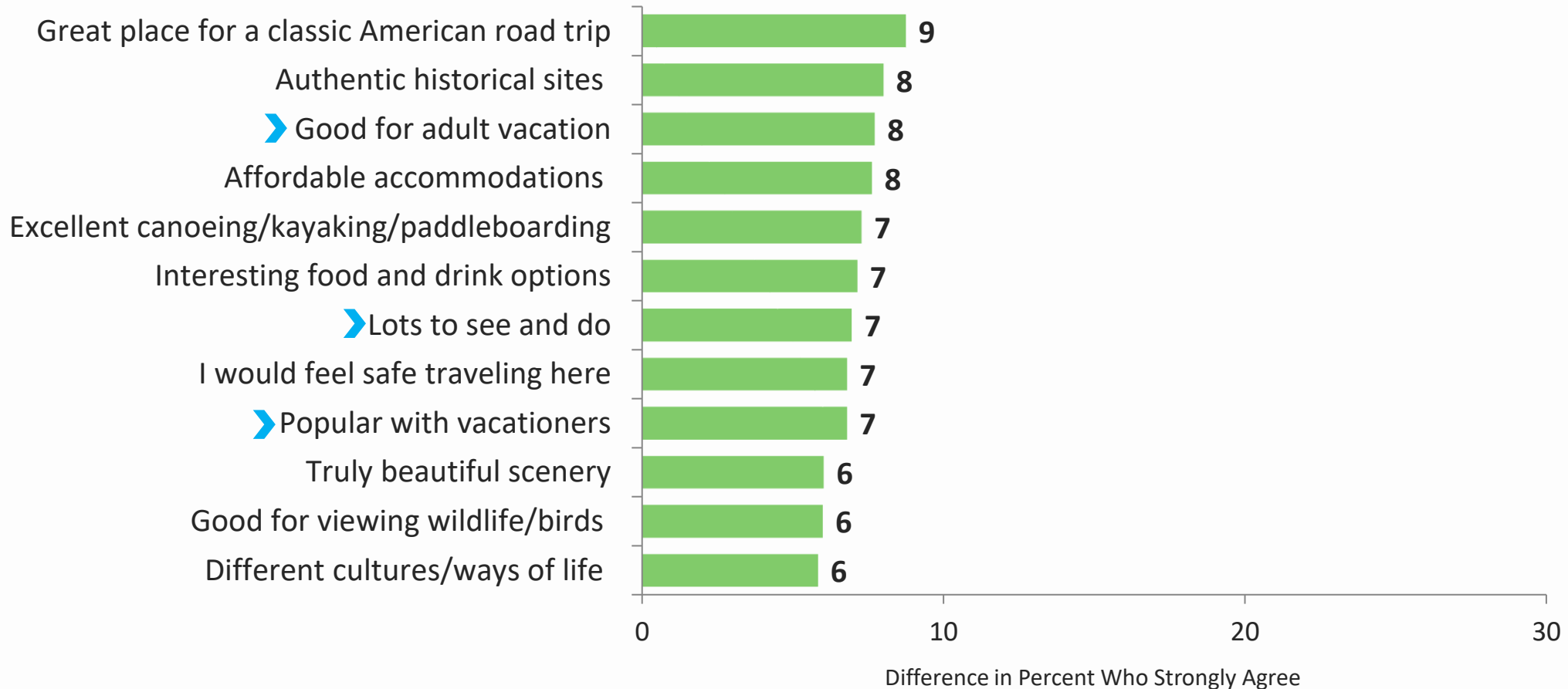
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)



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

Image Attributes Most Impacted by Advertising (Cont'd)



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



Main Findings: North Dakota's Overall Position in the Target Market



A visit to North Dakota is a fun ride for families. Actor and North Dakota native, Josh Duhamel, enjoys showing his son, Axl, the thrill of our fairs, zoos, water parks and delightful downtowns. Visit us online for more family-friendly events and attractions and start planning today.

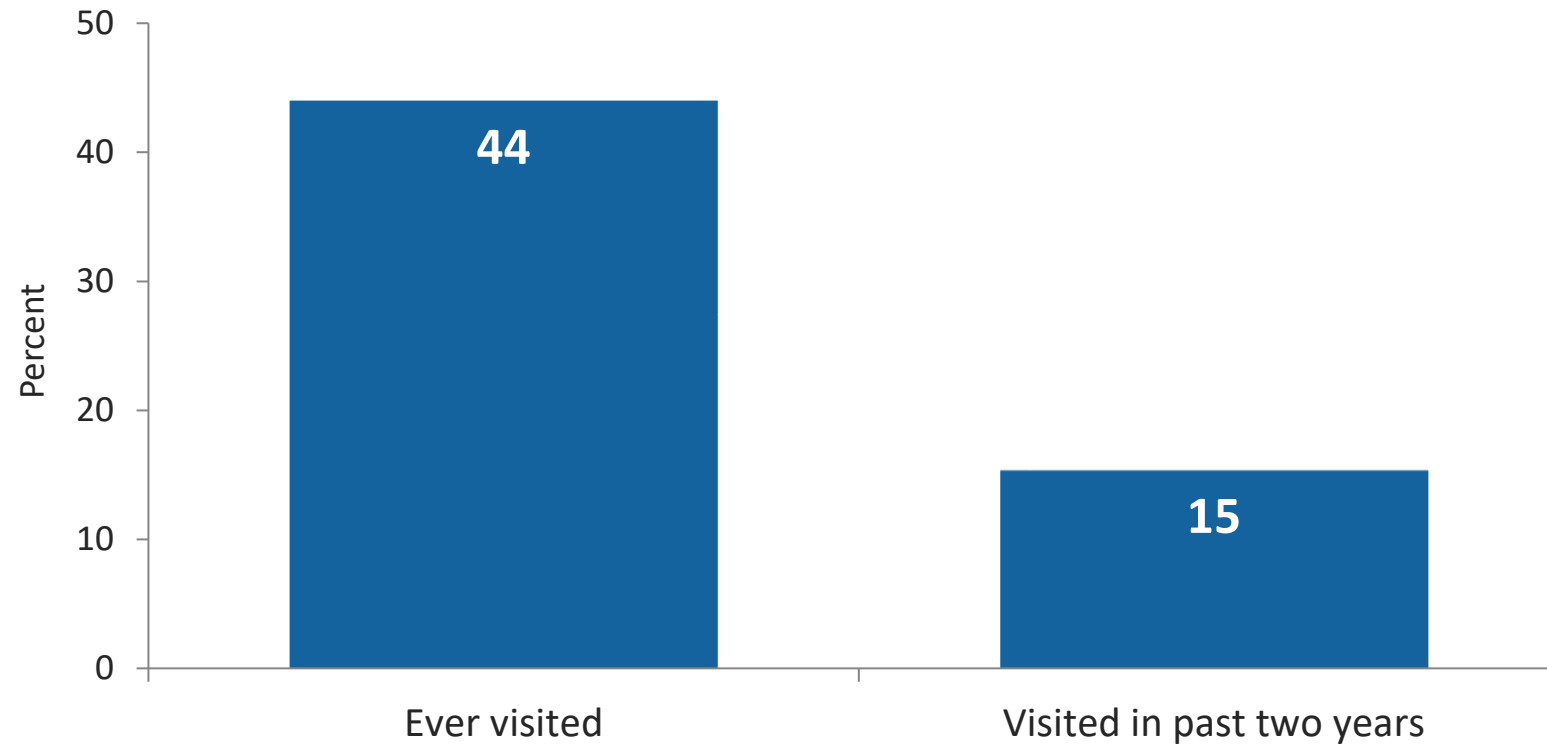
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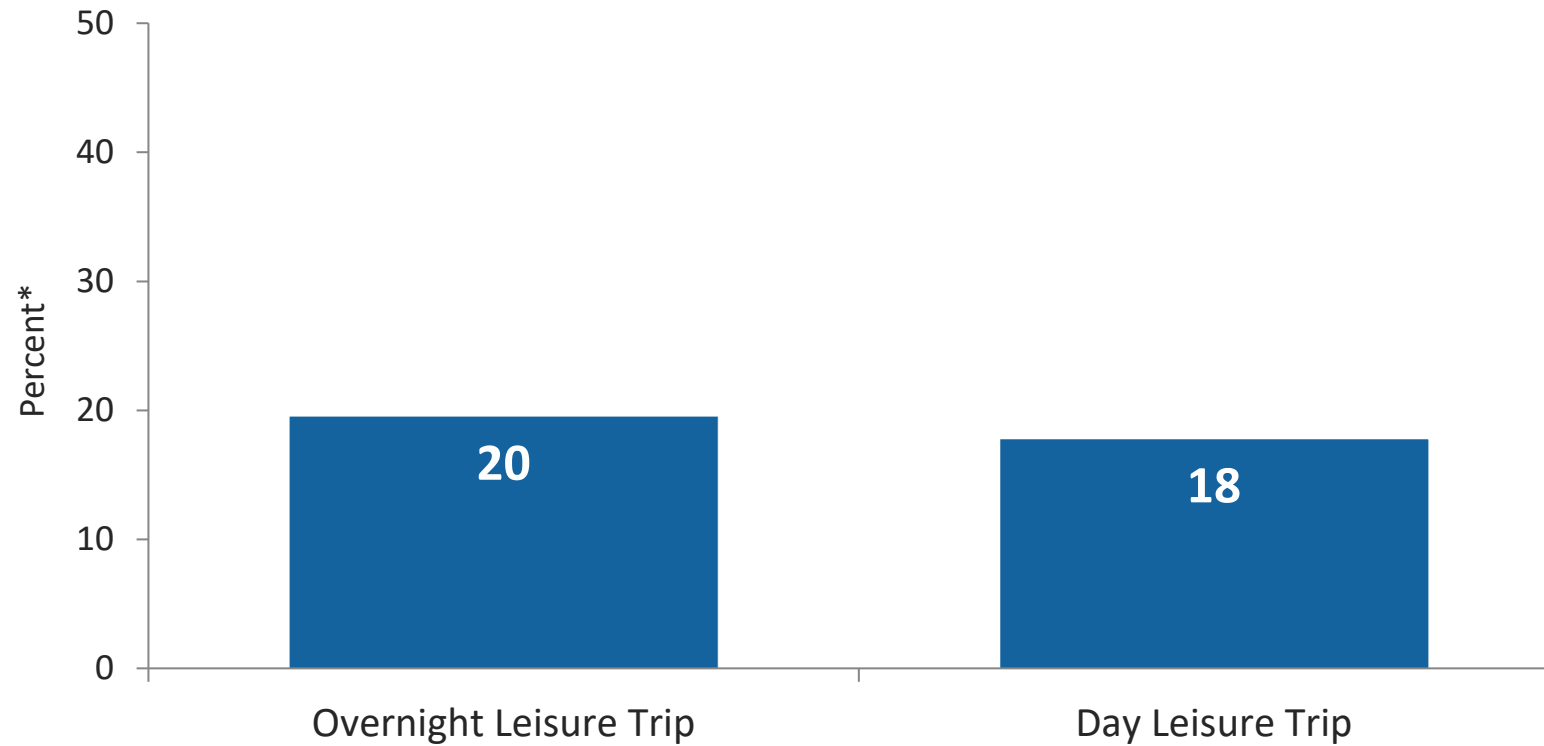
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Destination Visitation & Interest

Previous Visitation to North Dakota



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



Actor Josh Duhamel enjoys getting out of character and visiting his home state of North Dakota for authentic, on-location experiences. Join us for events like a powwow or North America's largest Scandinavian festival. Visit us online for more events, festivals and attractions and start planning today.

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Destination Hot Buttons

Travel Motivators

- 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.

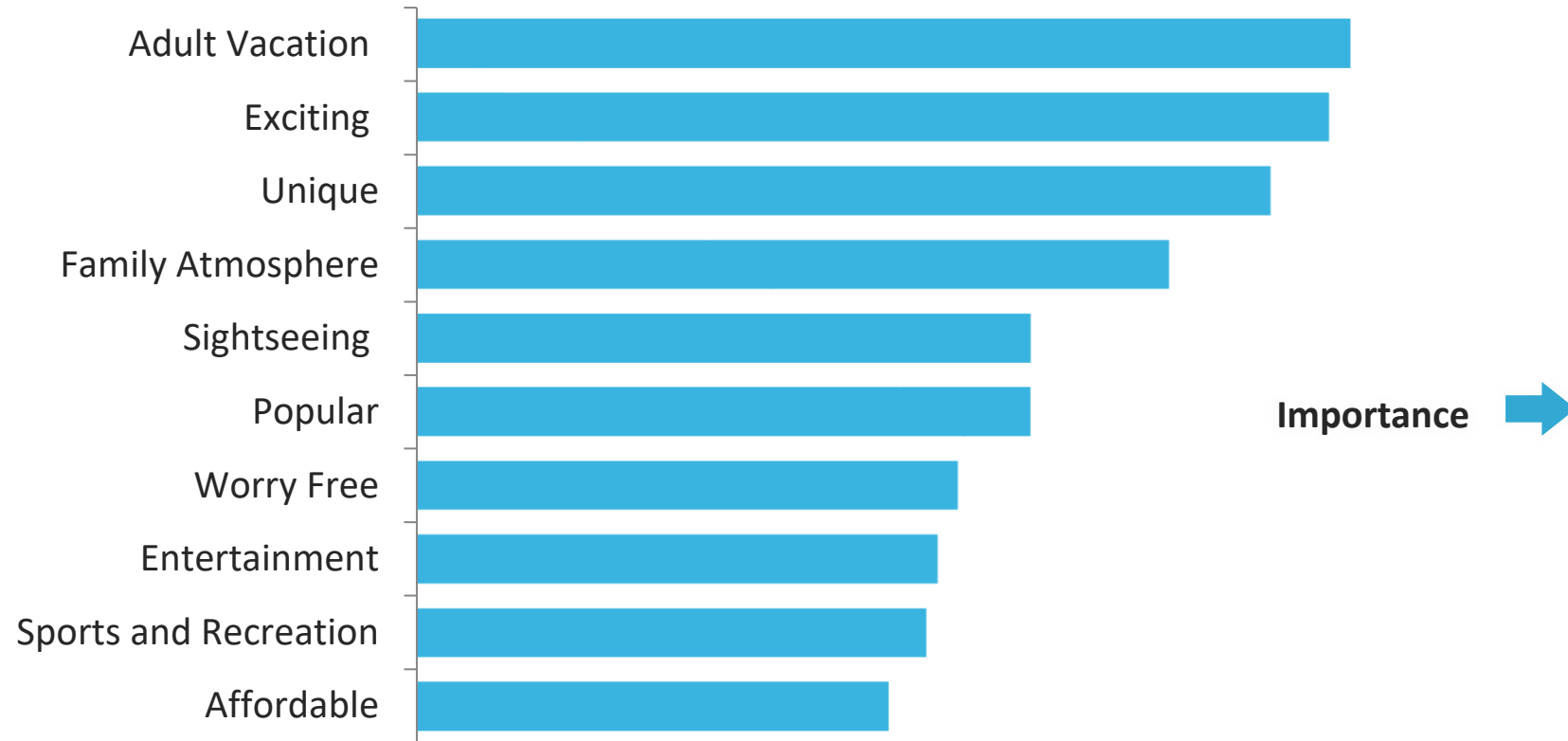
Travel Motivators (Cont'd)

- 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.

Travel Motivators (Cont'd)

- 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

Hot Buttons

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



North Dakota's Image vs. the Competition

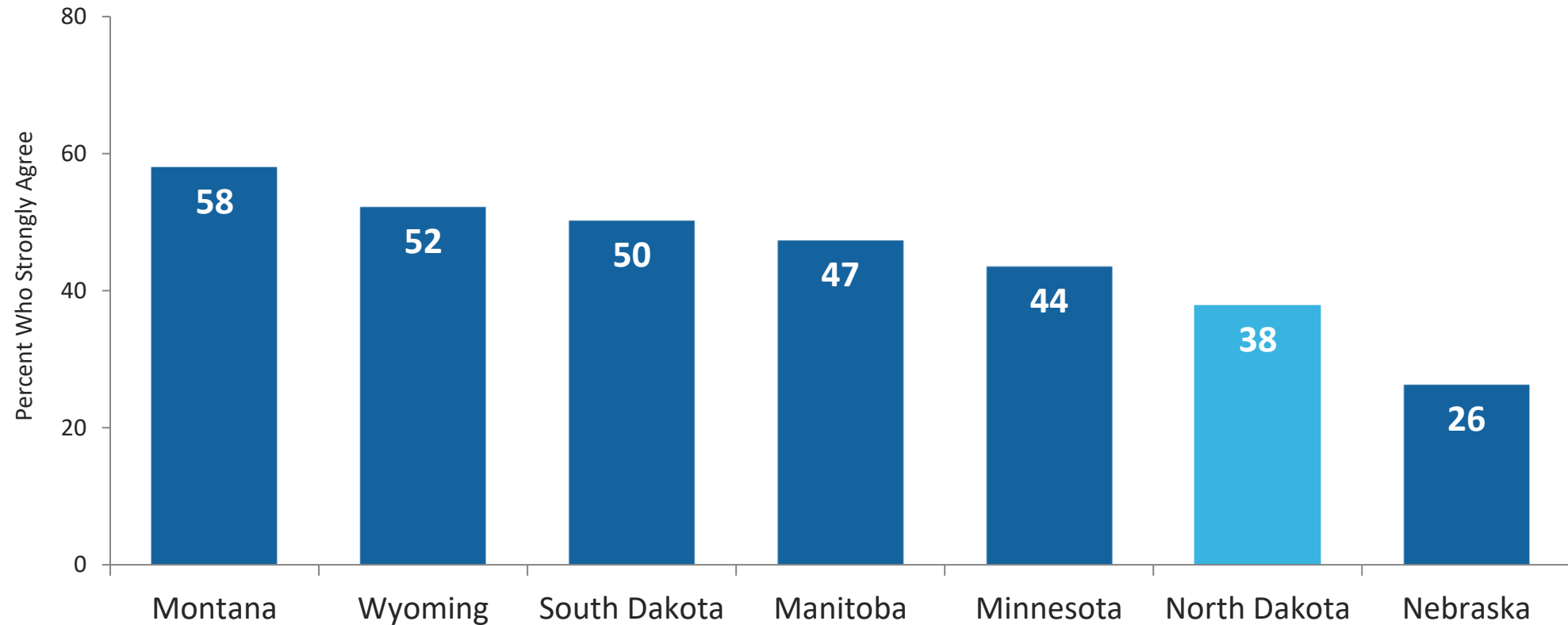
North Dakota's Image

- 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.

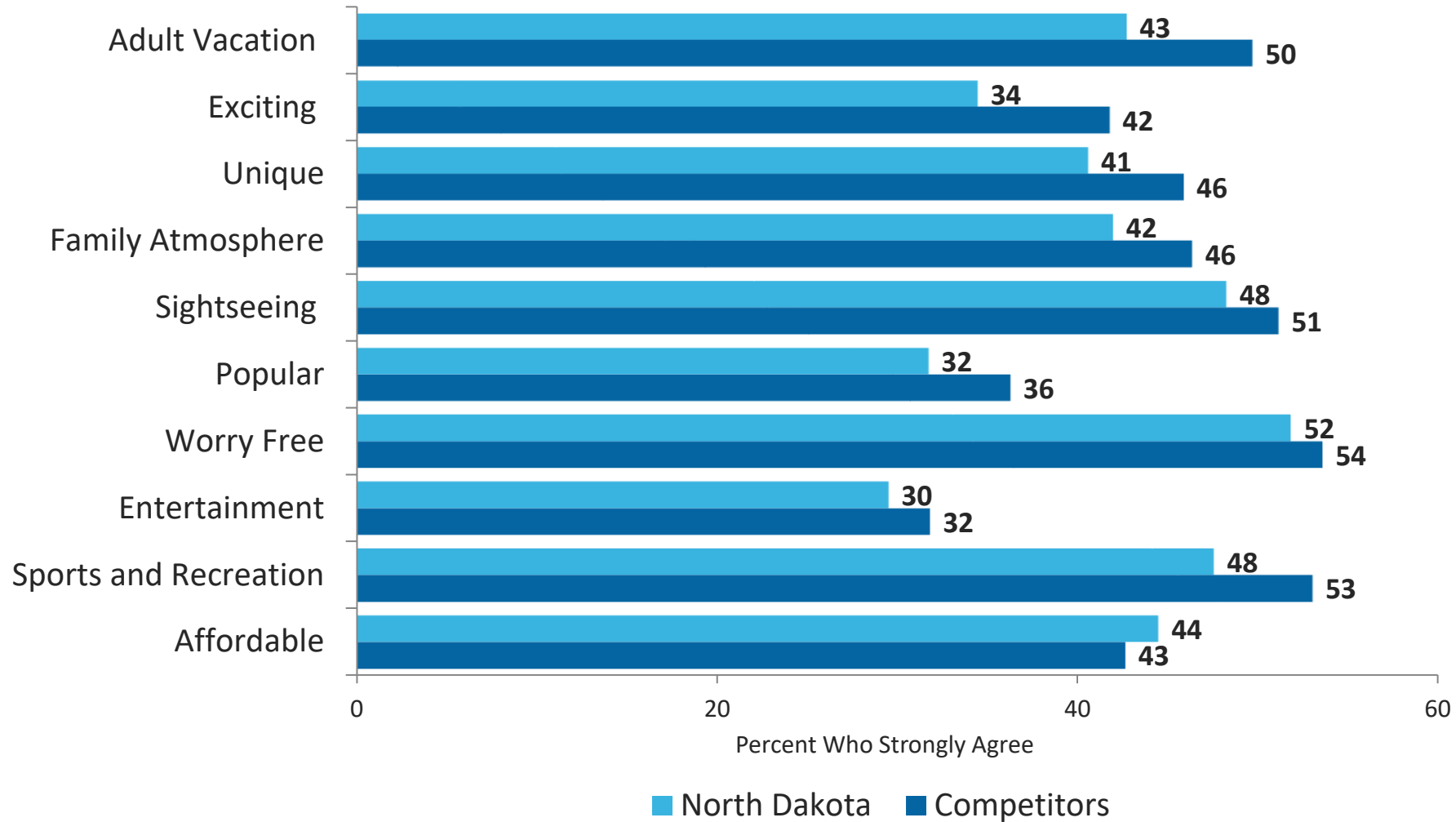
North Dakota's Image (Cont'd)

- 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

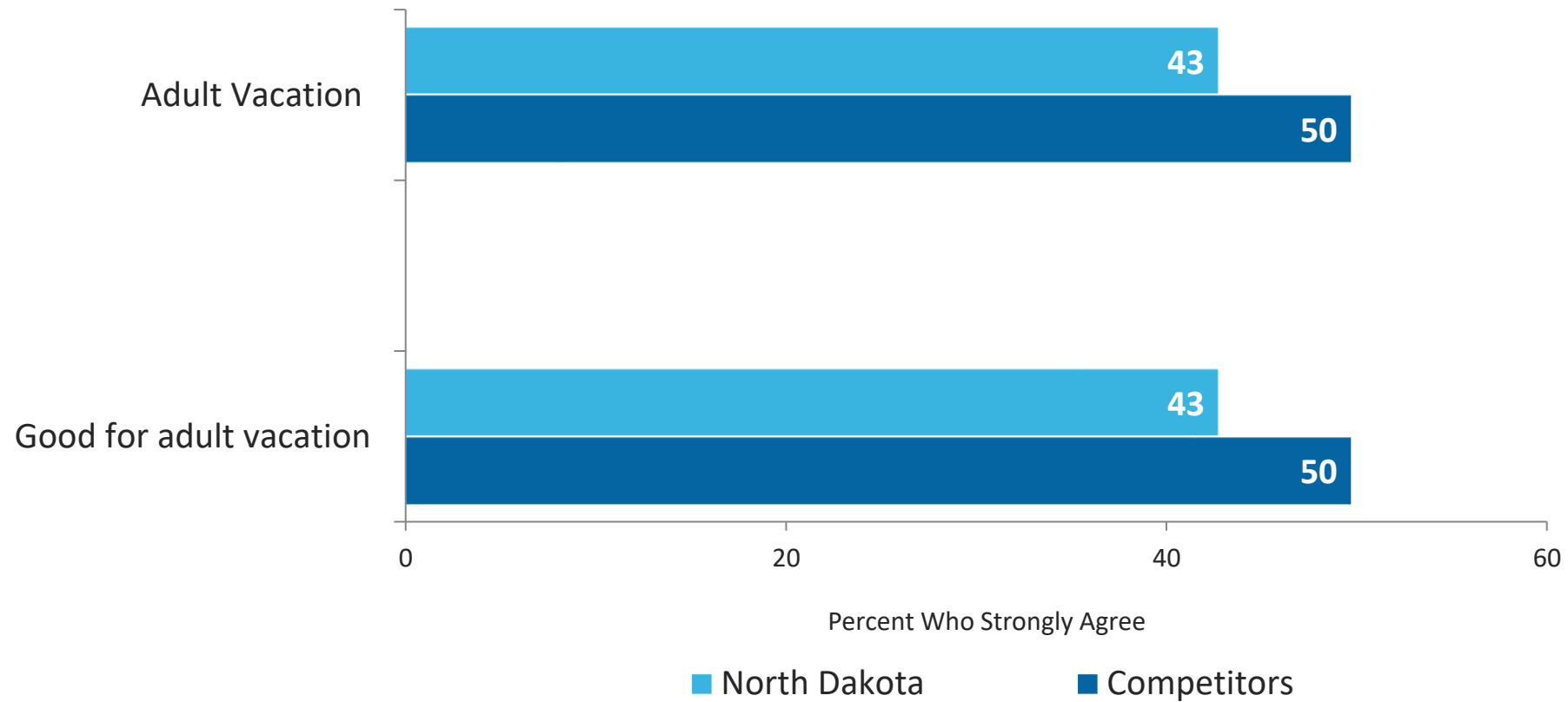
North Dakota Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”



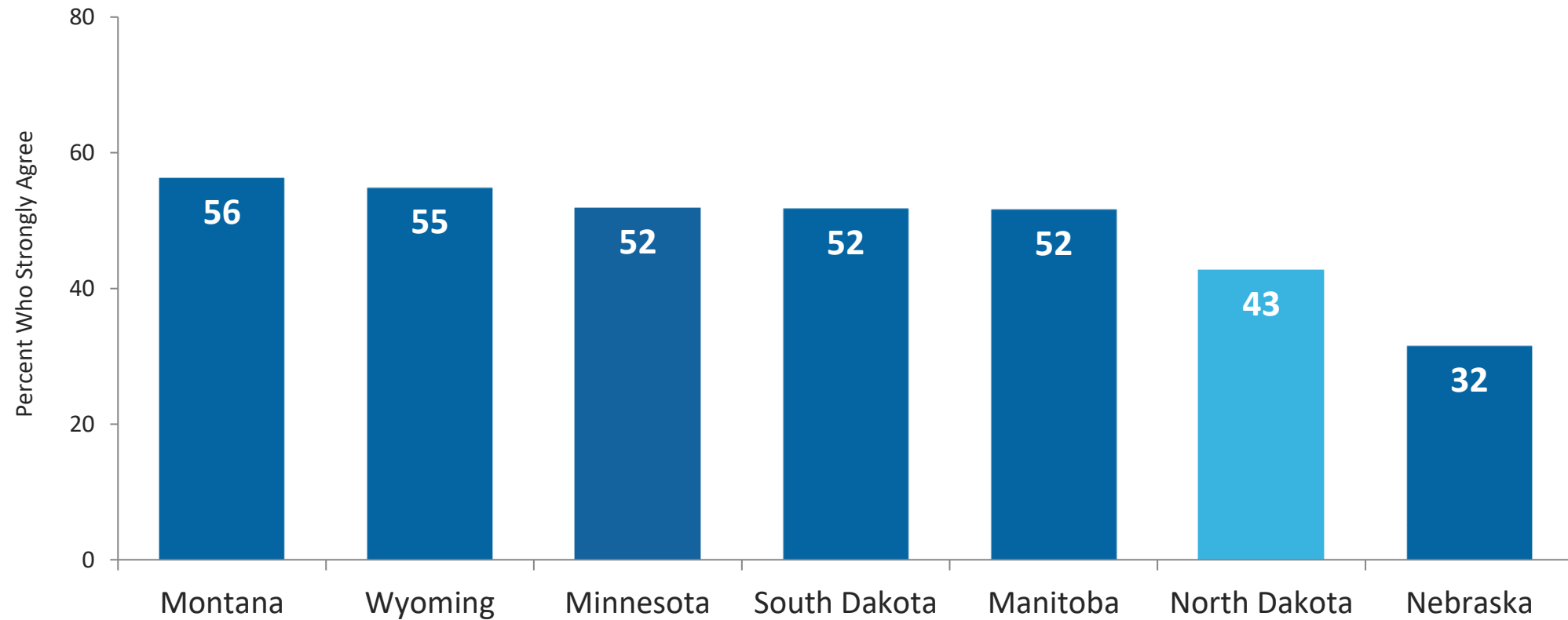
North Dakota's Overall Image vs. Competition*



North Dakota's Image vs. Competition — Adult Vacation

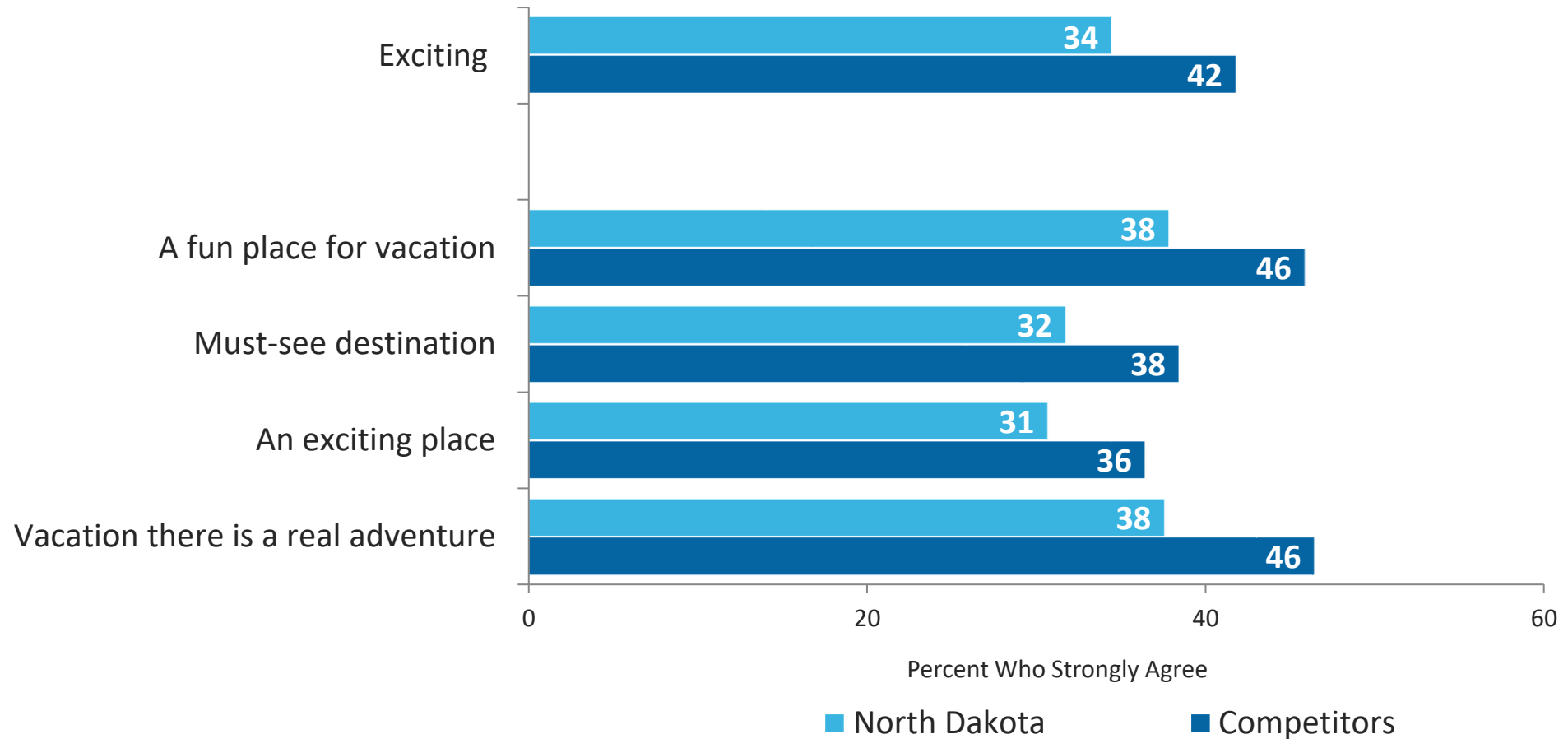


North Dakota's Image vs. Competition — Adult Vacation



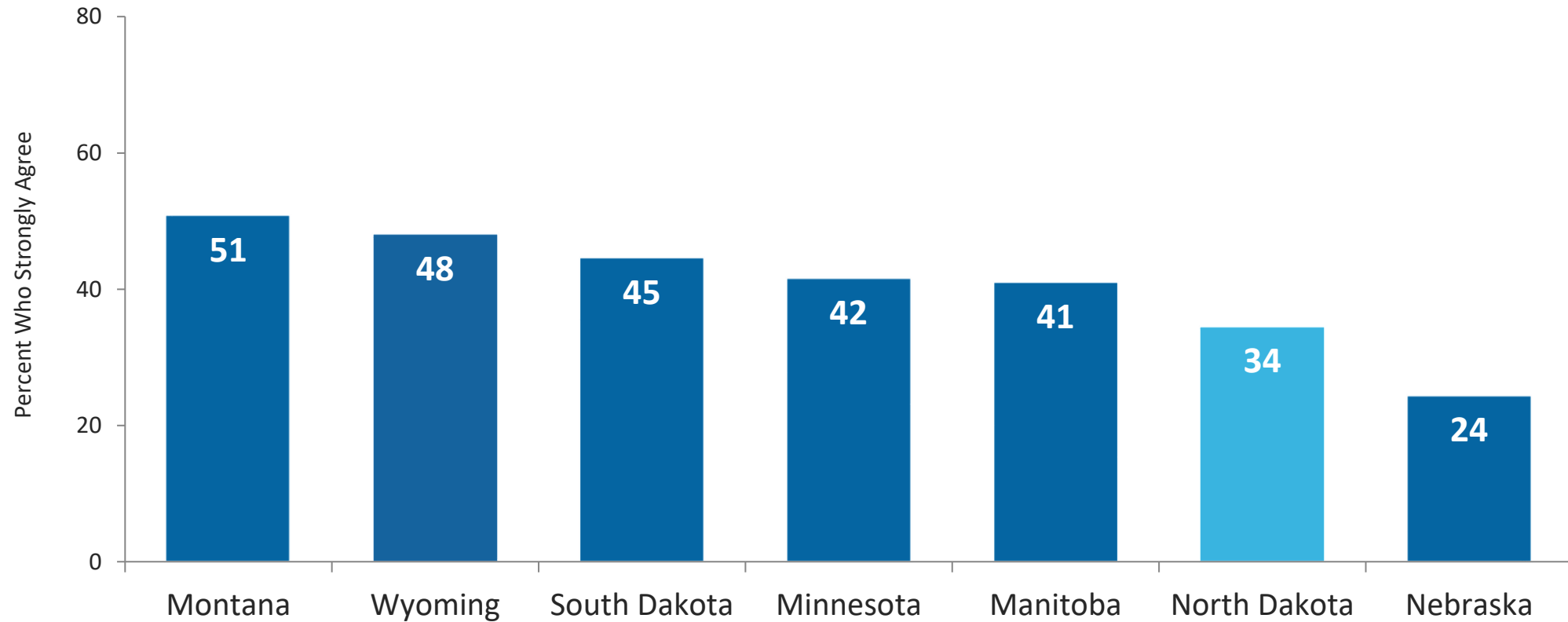
North Dakota's Image vs. Competition

— Exciting

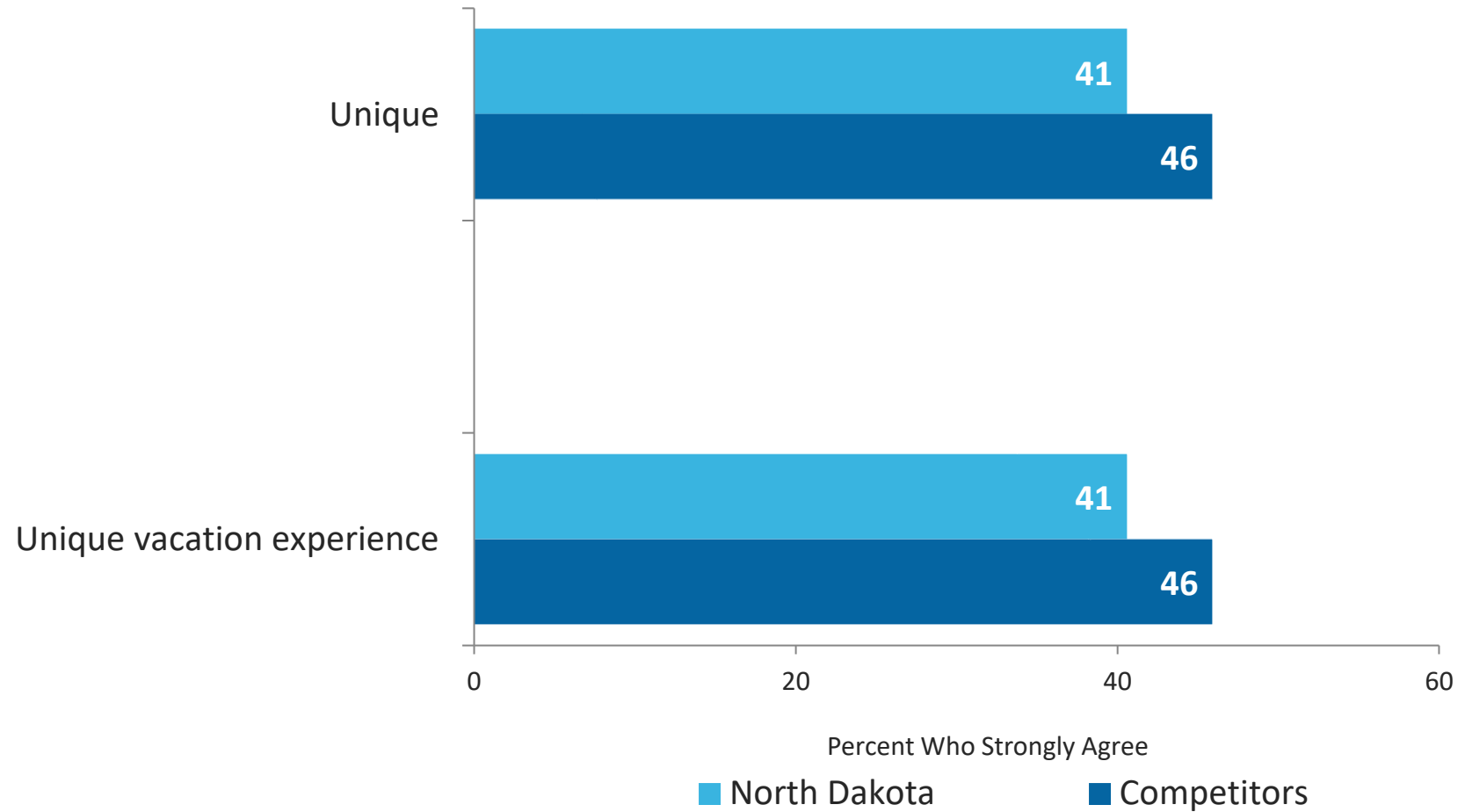


North Dakota's Image vs. Competition

— Exciting

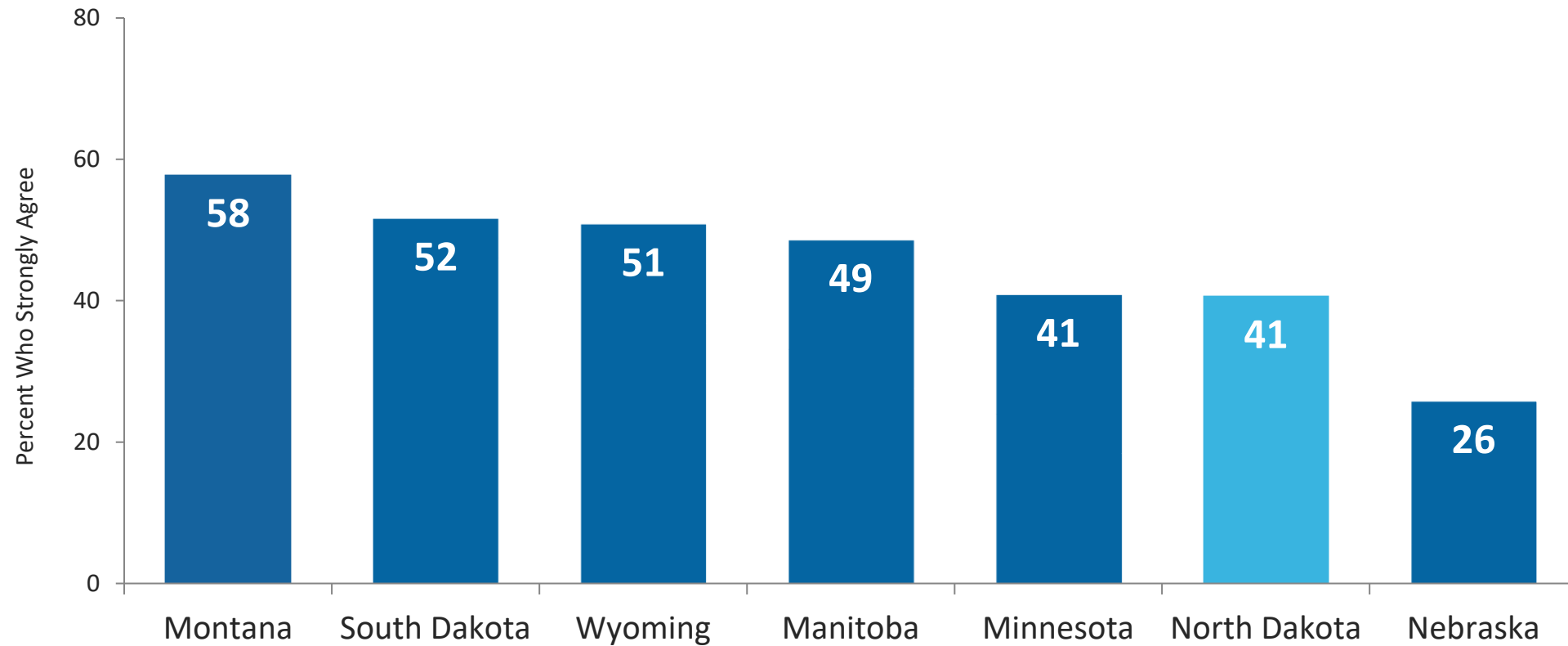


North Dakota's Image vs. Competition — Unique

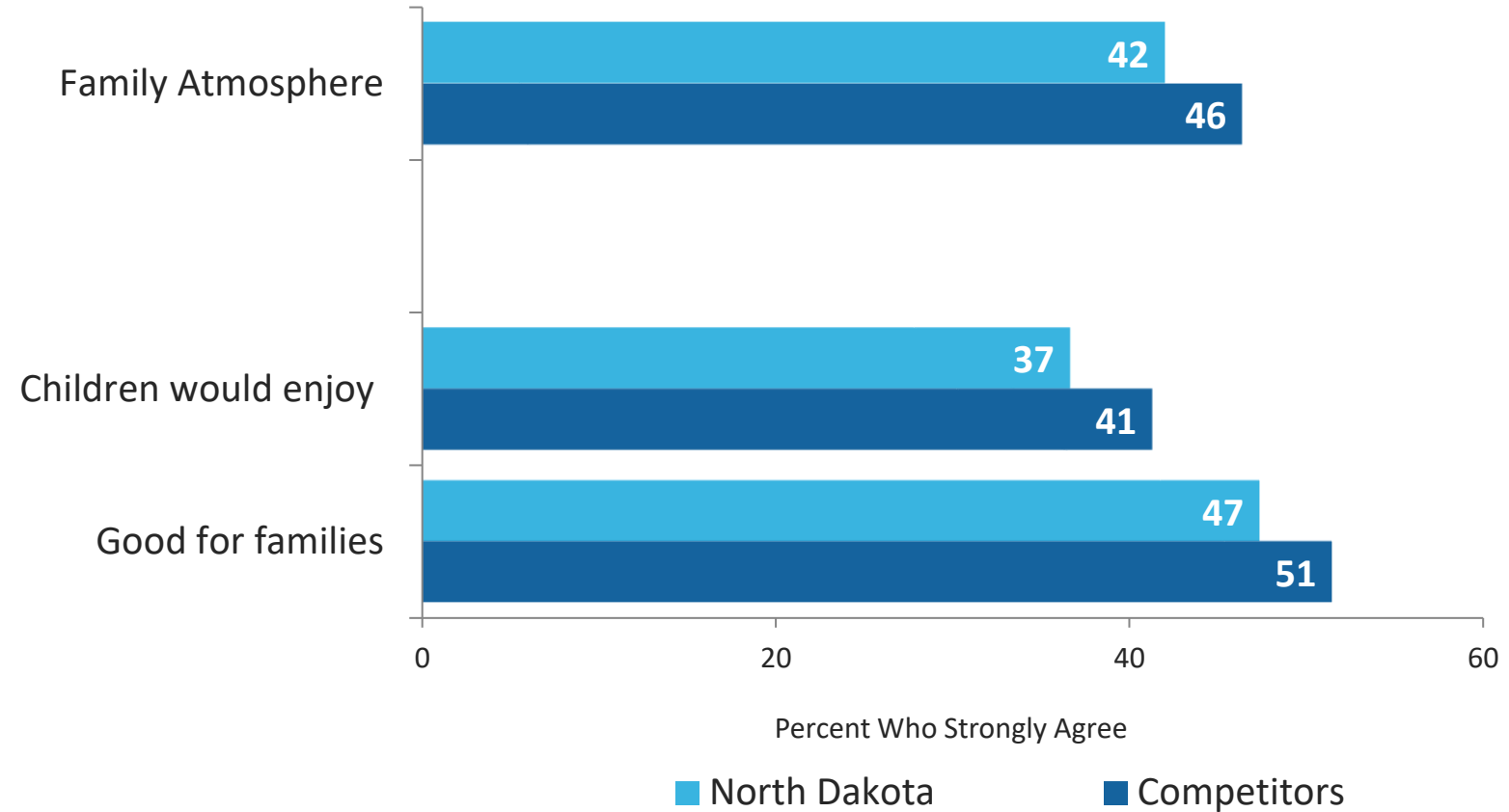


North Dakota's Image vs. Competition

— Unique

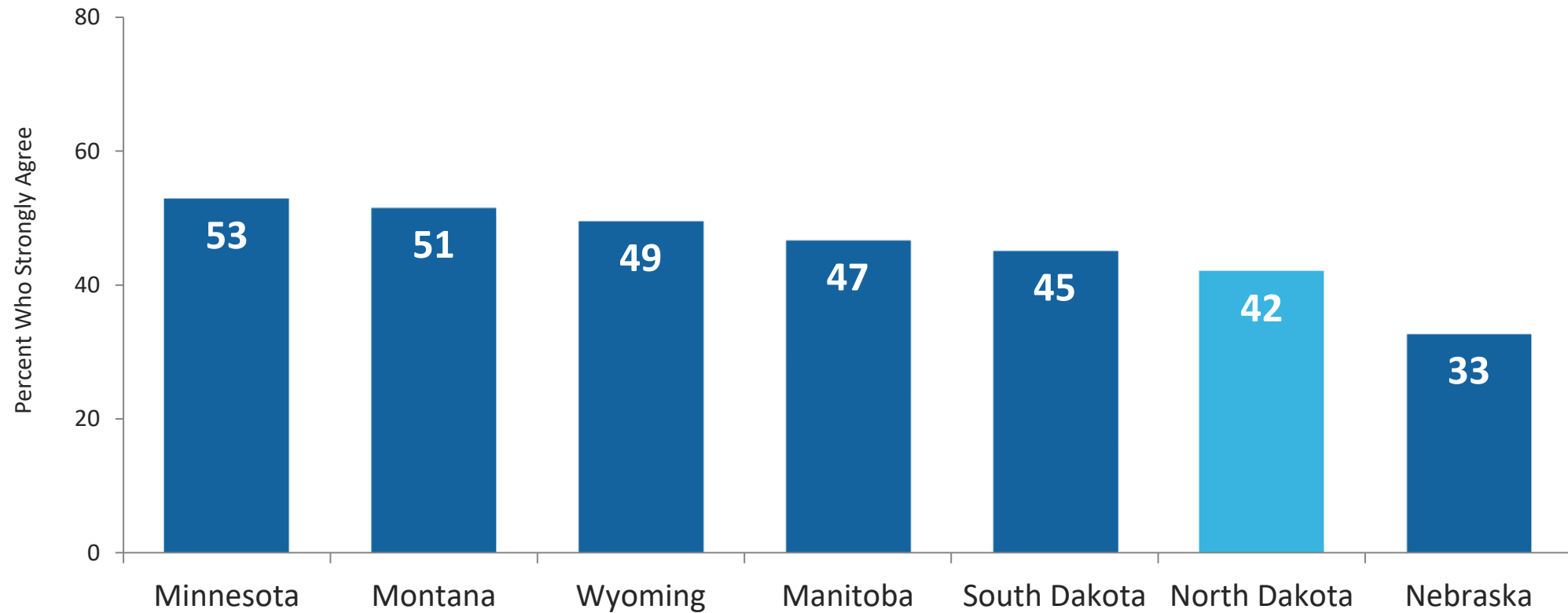


North Dakota's Image vs. Competition — Family Atmosphere

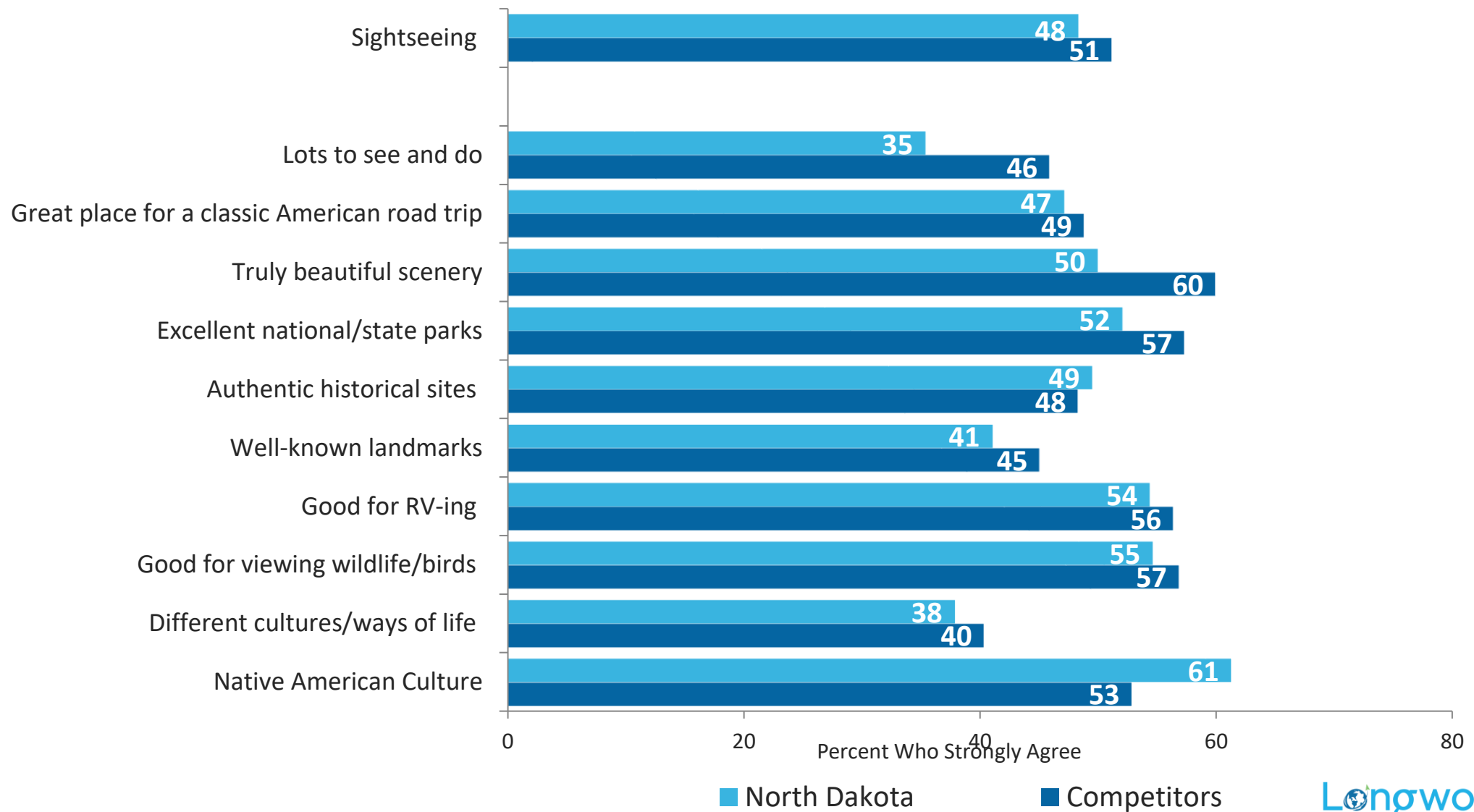


North Dakota's Image vs. Competition

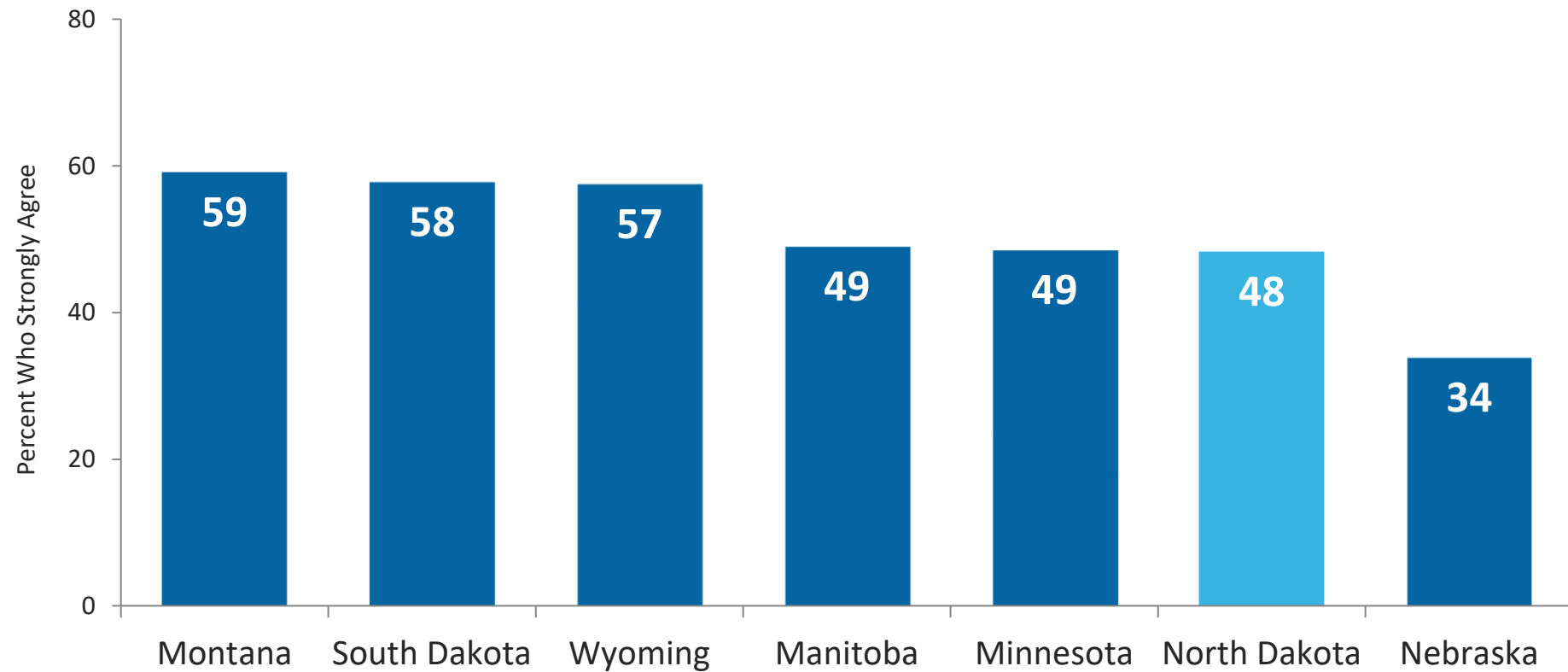
— Family Atmosphere



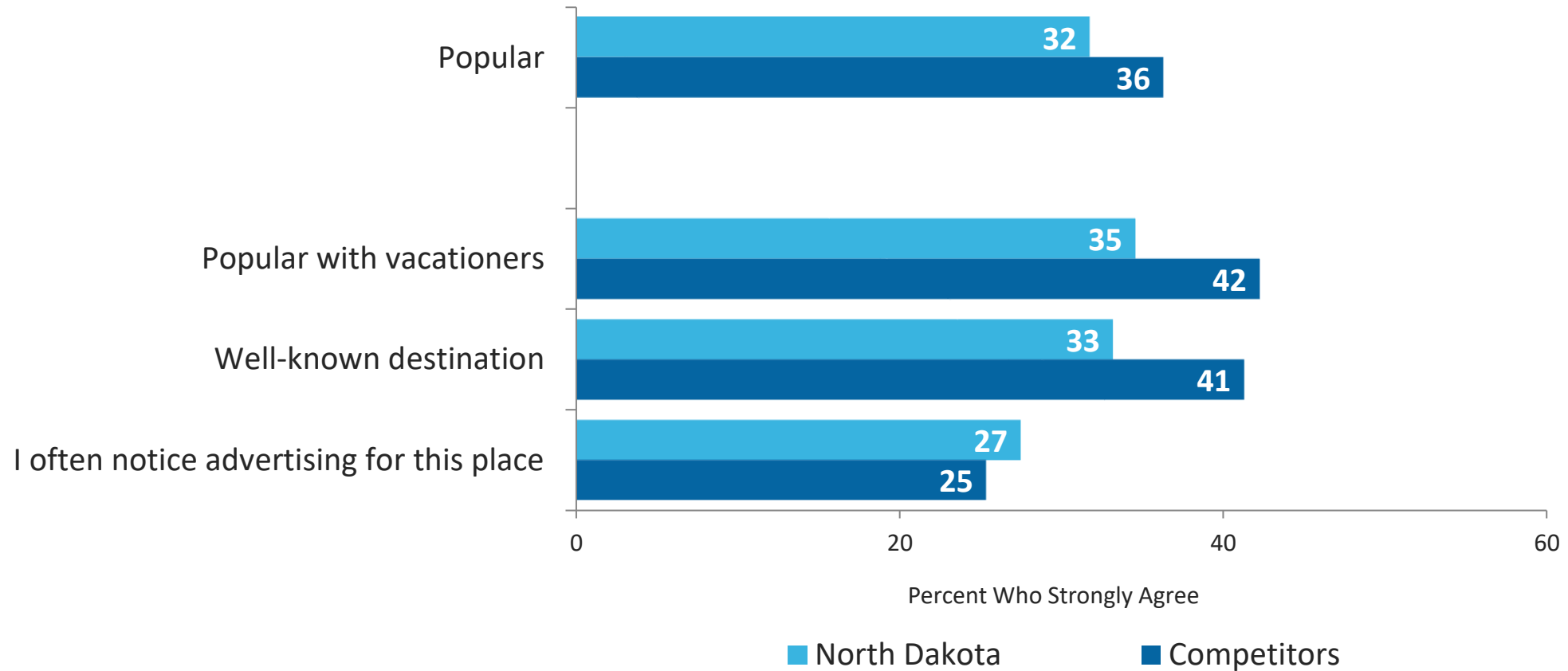
North Dakota's Image vs. Competition — Sightseeing



North Dakota's Image vs. Competition — Sightseeing

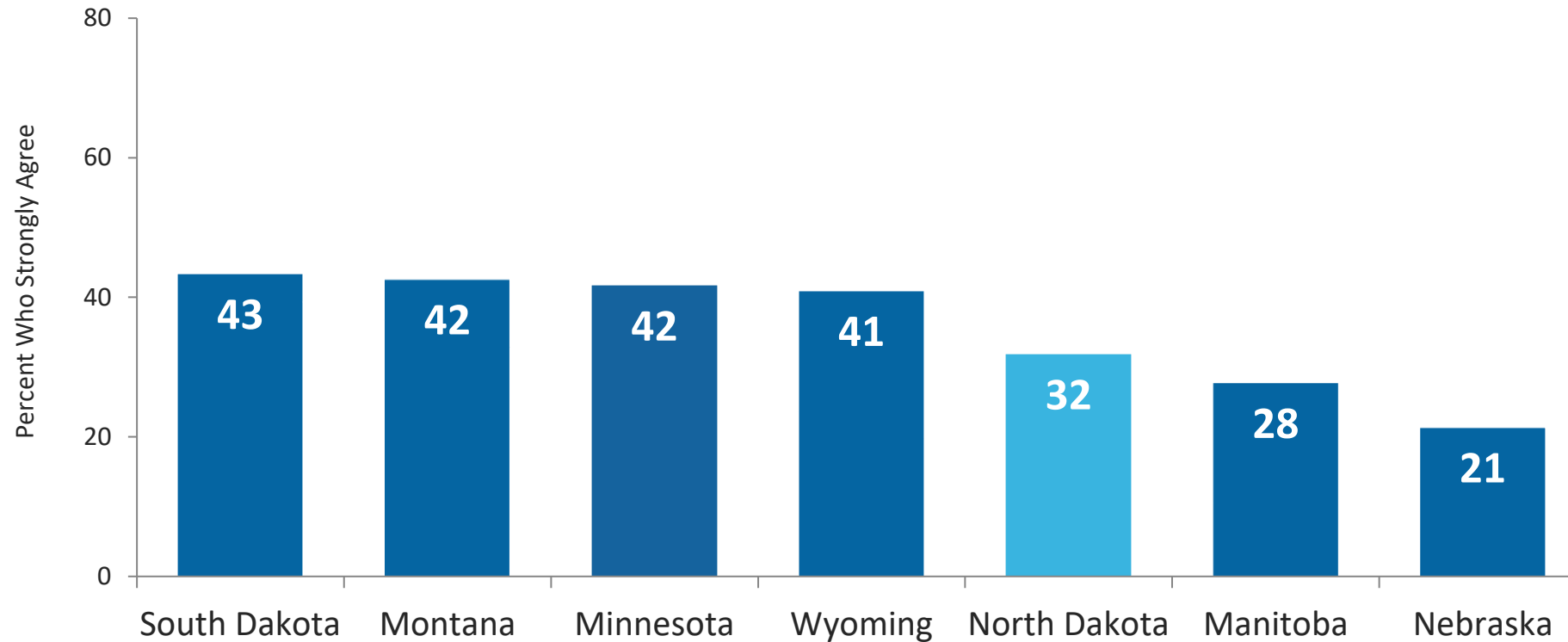


North Dakota's Image vs. Competition — Popular



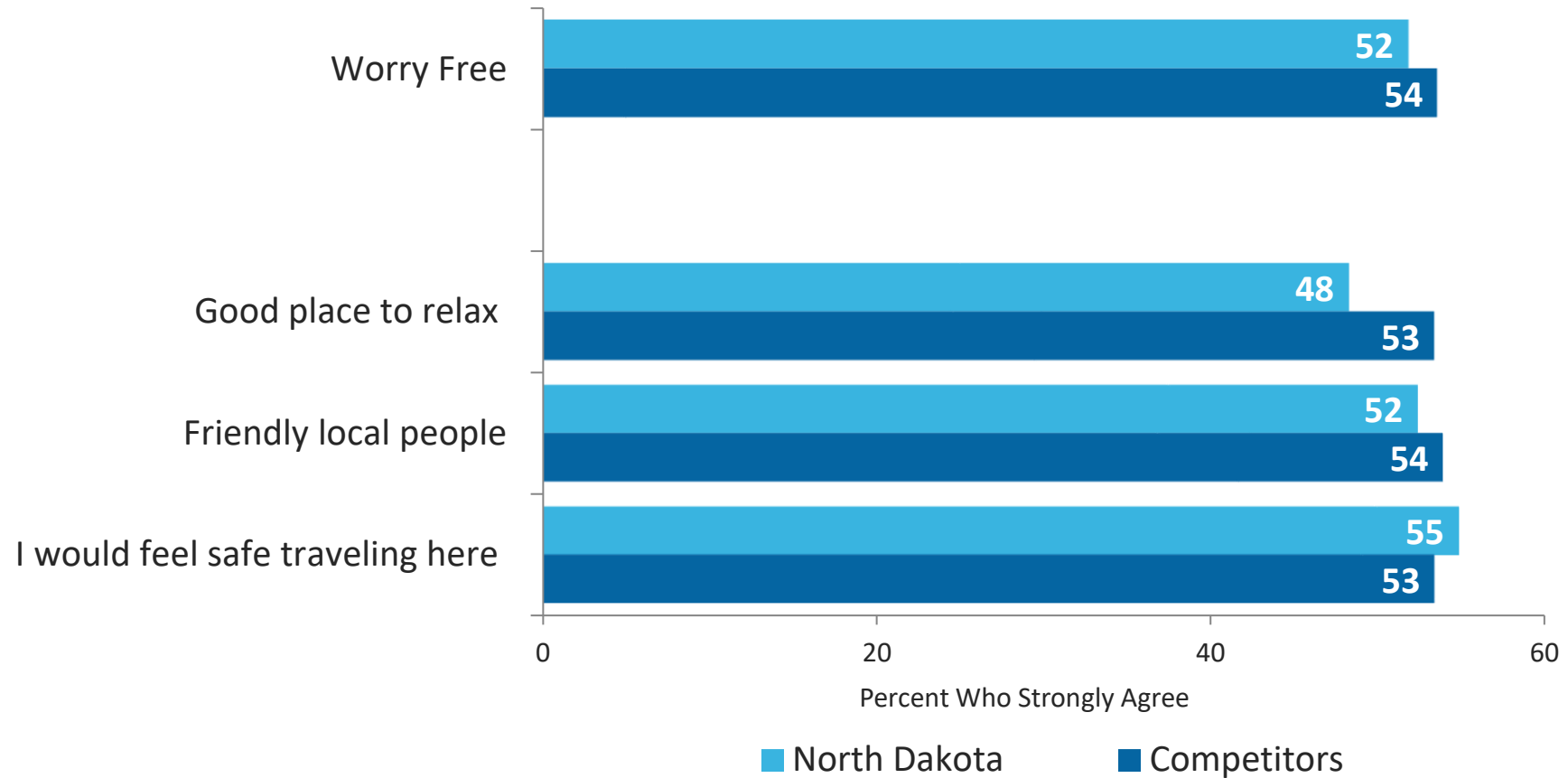
North Dakota's Image vs. Competition

— Popular



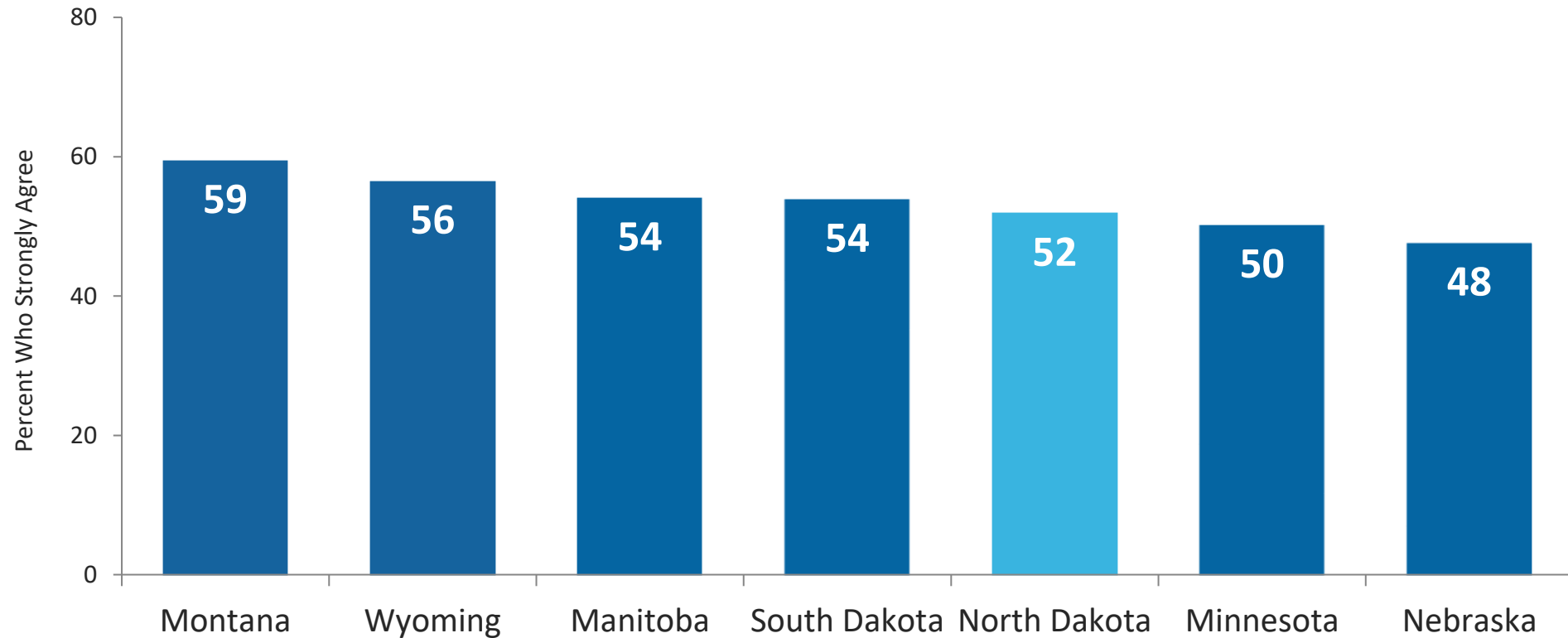
North Dakota's Image vs. Competition

— Worry Free

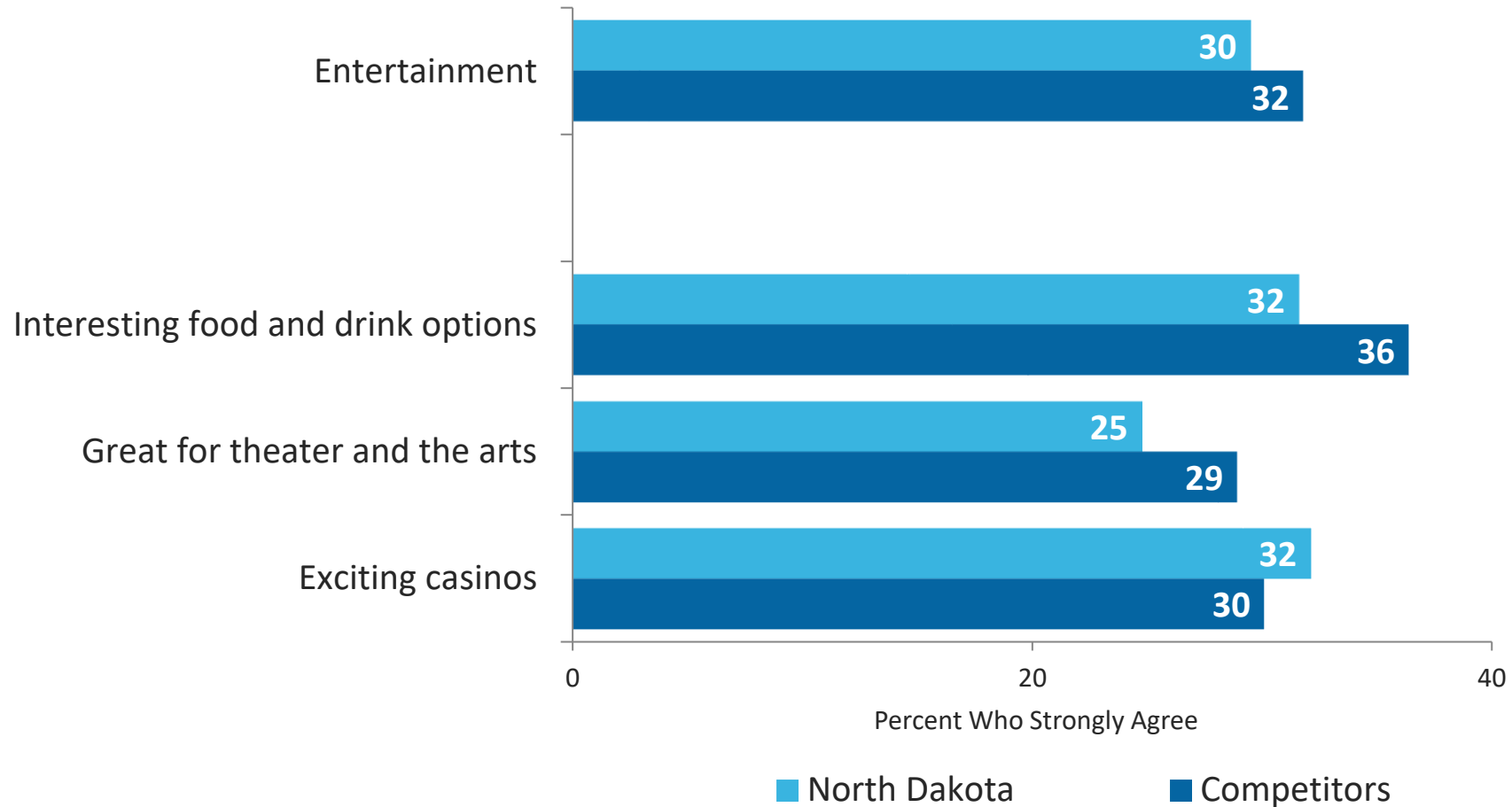


North Dakota's Image vs. Competition

— Worry Free

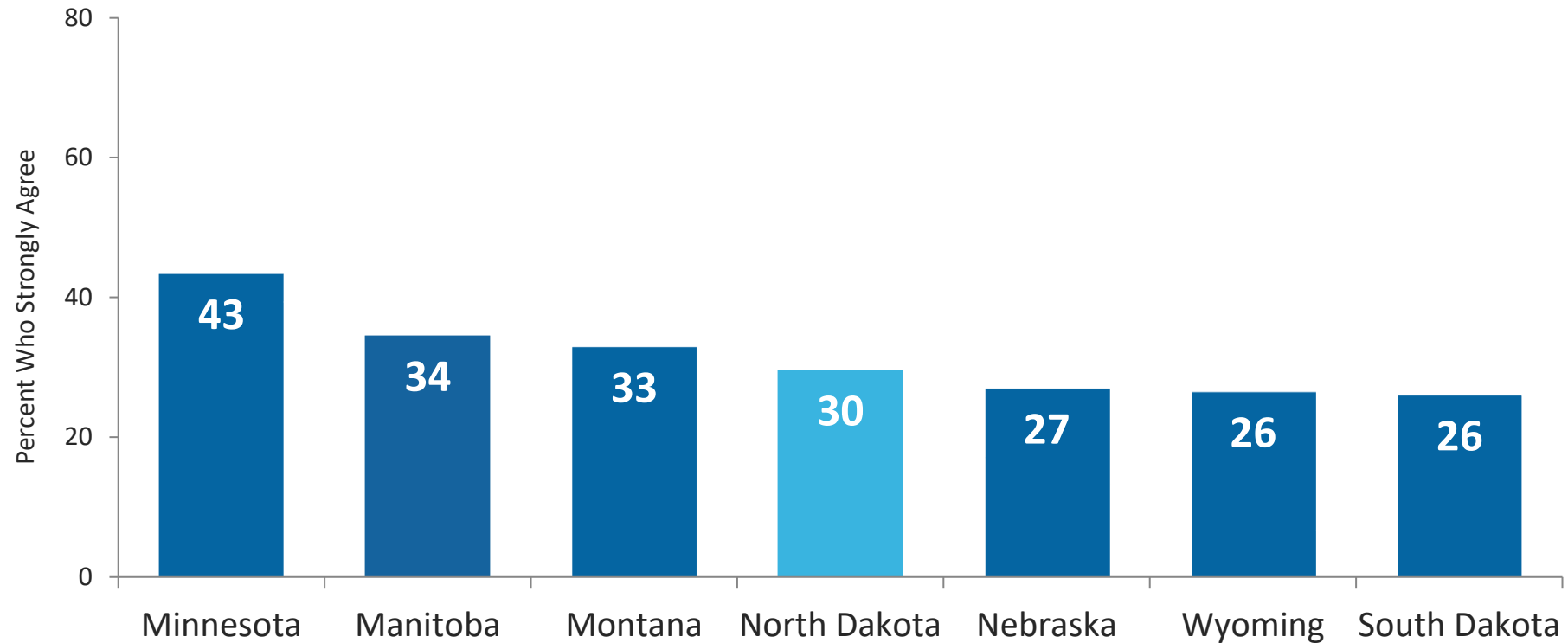


North Dakota's Image vs. Competition — Entertainment

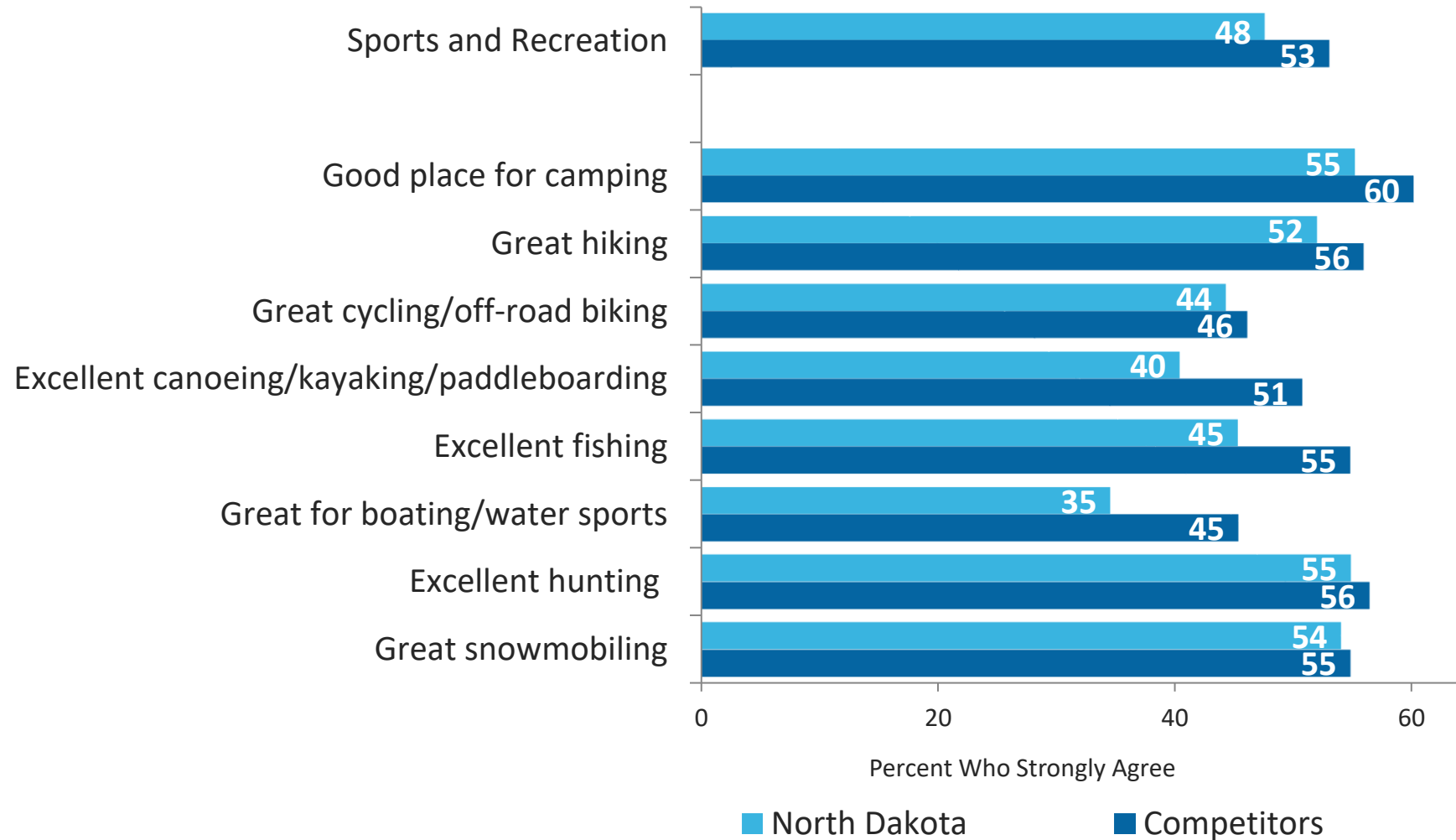


North Dakota's Image vs. Competition

— Entertainment

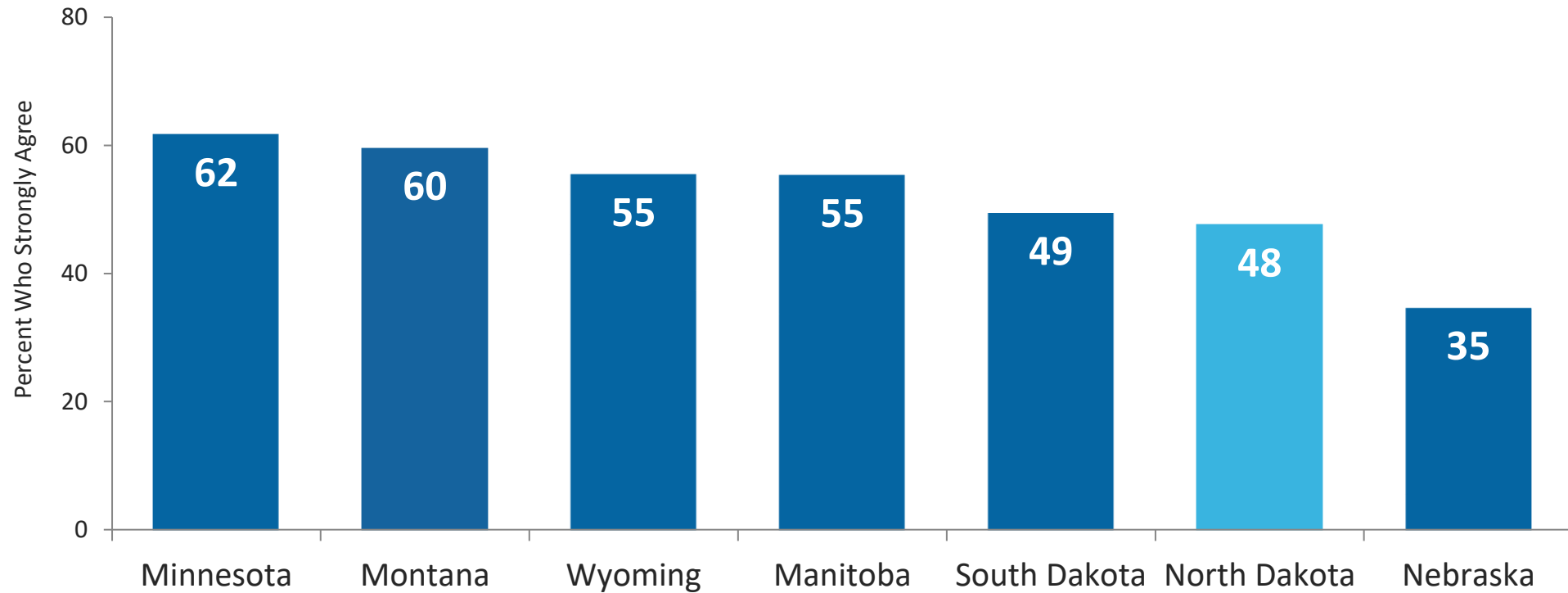


North Dakota's Image vs. Competition — Sports & Recreation

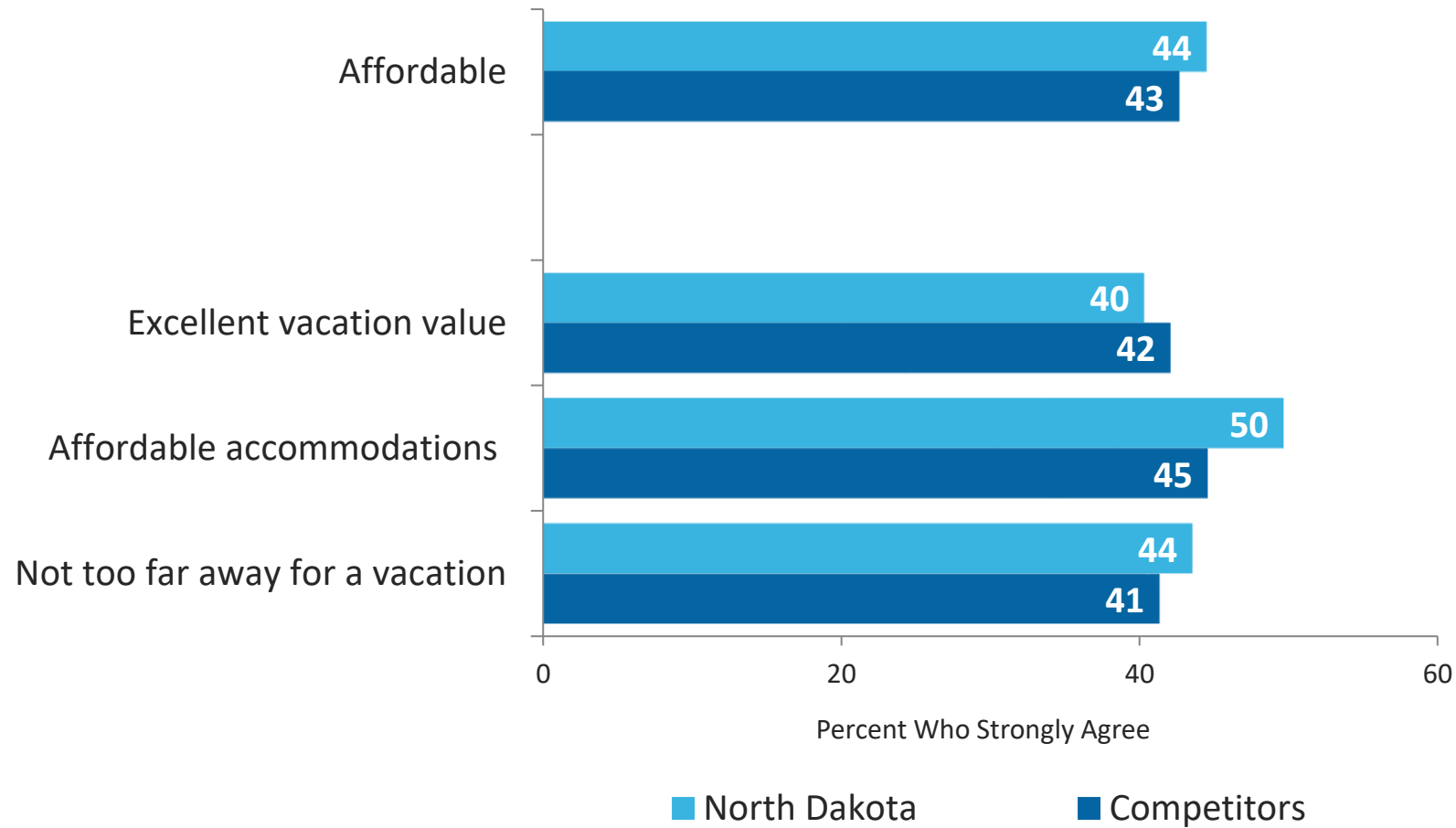


North Dakota's Image vs. Competition

— Sports & Recreation

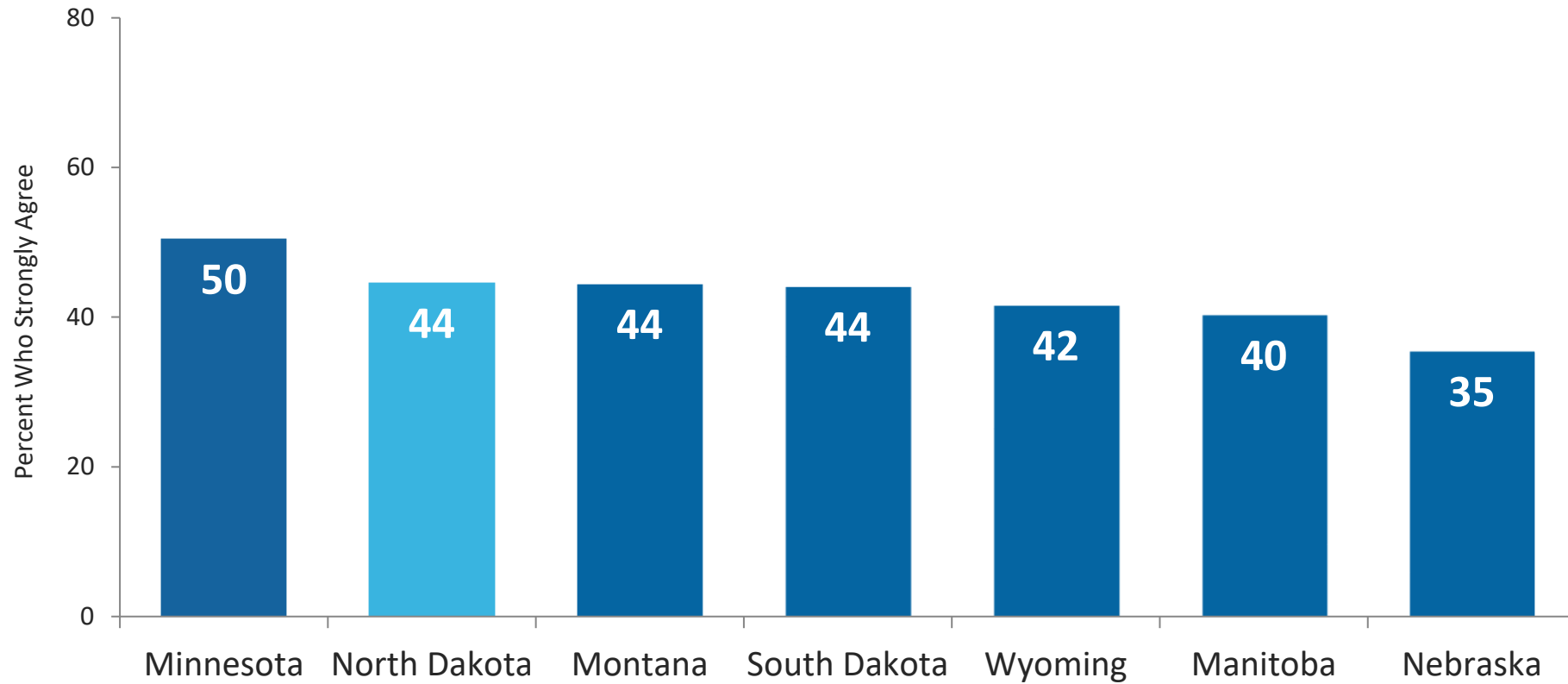


North Dakota's Image vs. Competition — Affordable

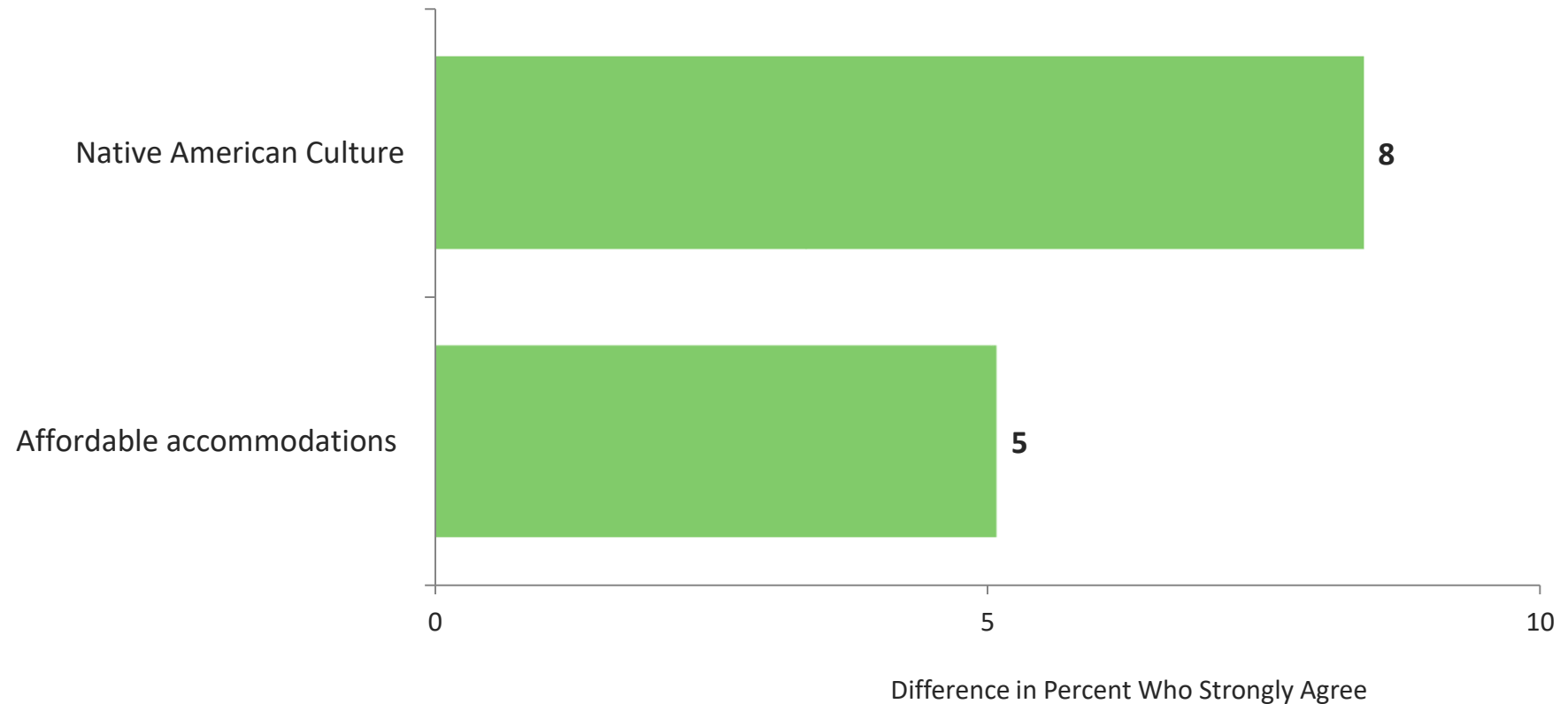


North Dakota's Image vs. Competition

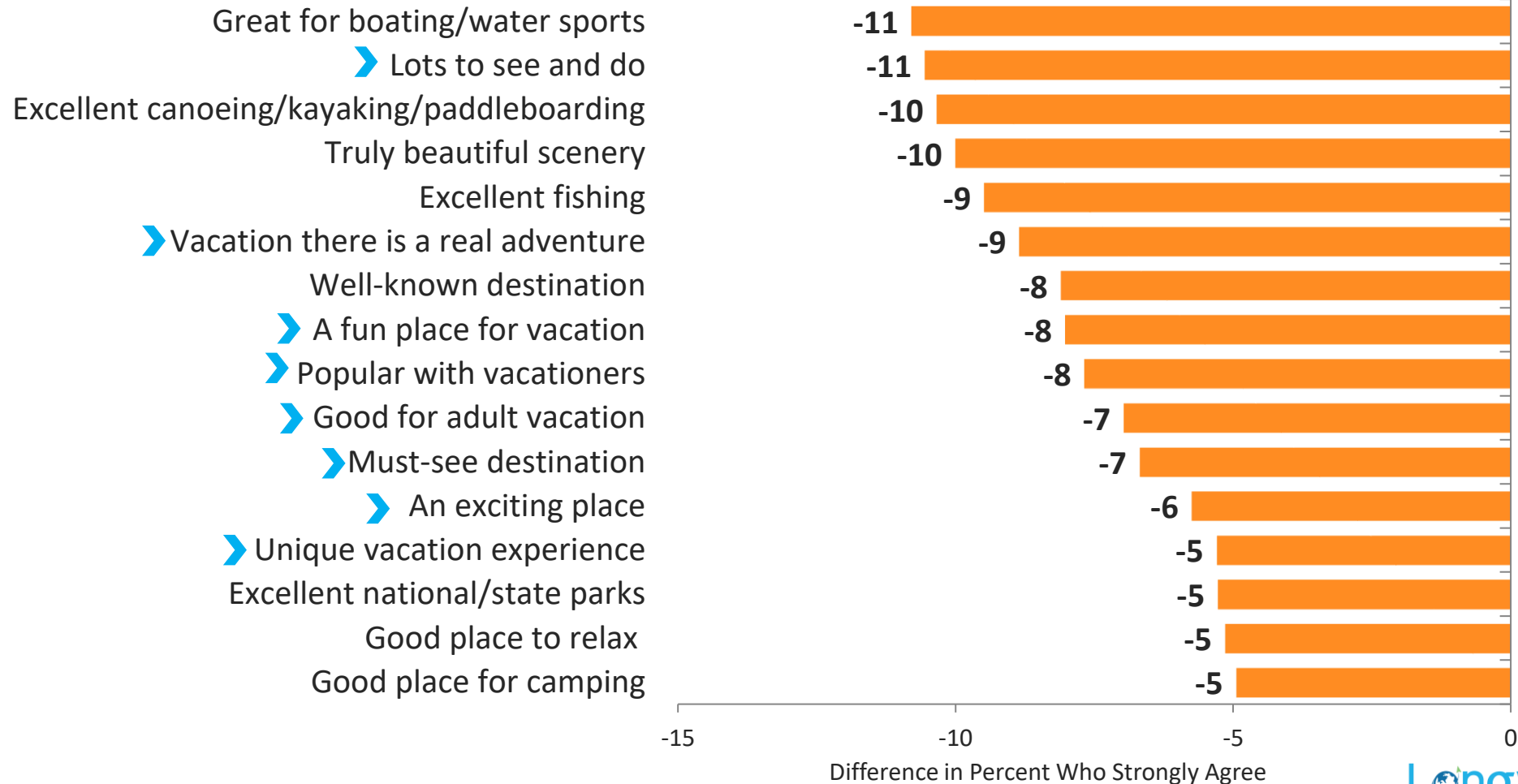
— Affordable



North Dakota's Image Strengths vs. Competition



North Dakota's Image Weaknesses vs. Competition





Clip-in and bike up to 144 miles of family-friendly to challenging terrain on the Maah Daah Hey Trail in the beautiful Badlands. It's the mountain biking destination that cues North Dakota native and actor Josh Duhamel to saddle up. Visit us online to learn more and plan your adventure.

LegendaryND.com

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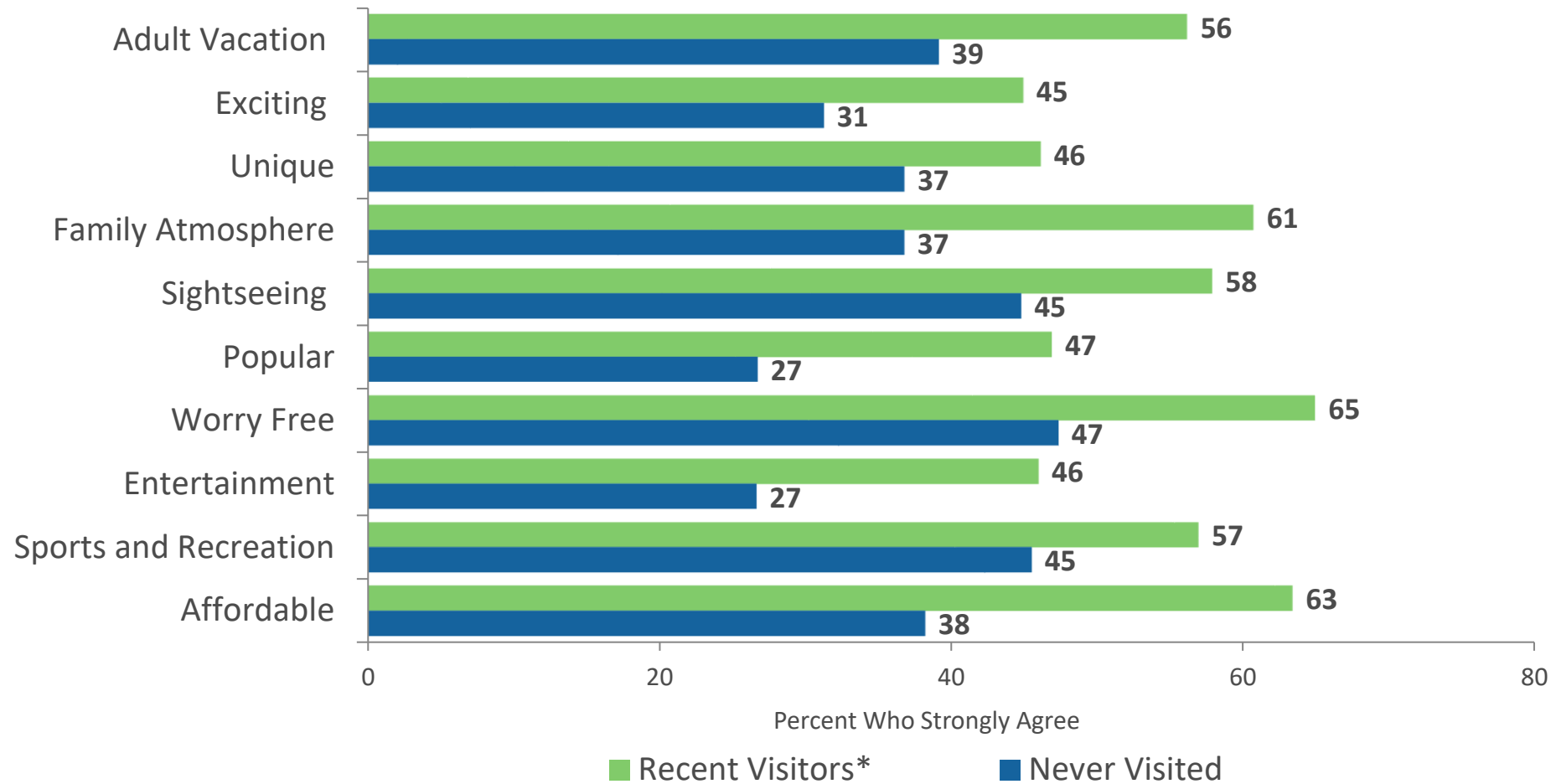
Longwoods
INTERNATIONAL

North Dakota's Product Delivery

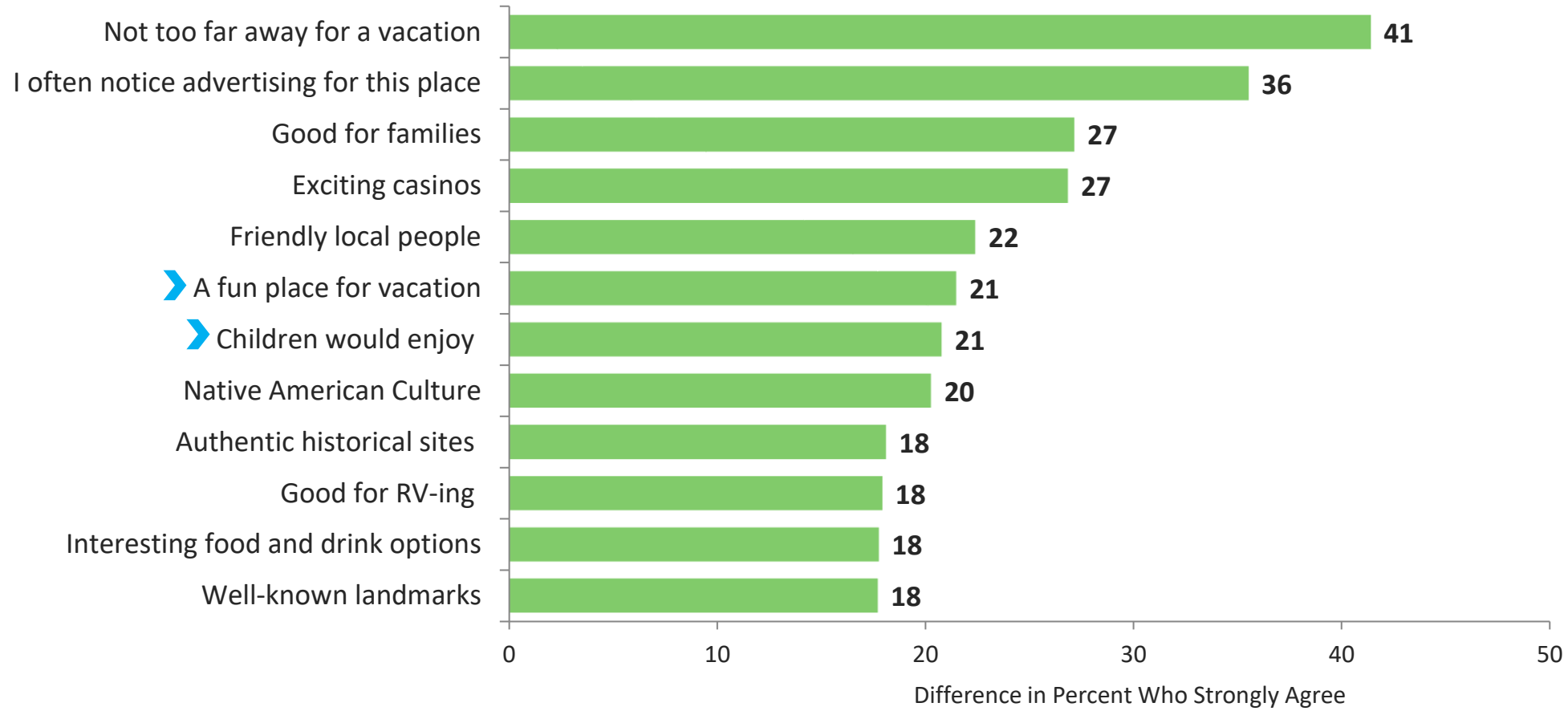
Product Delivery

- 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.

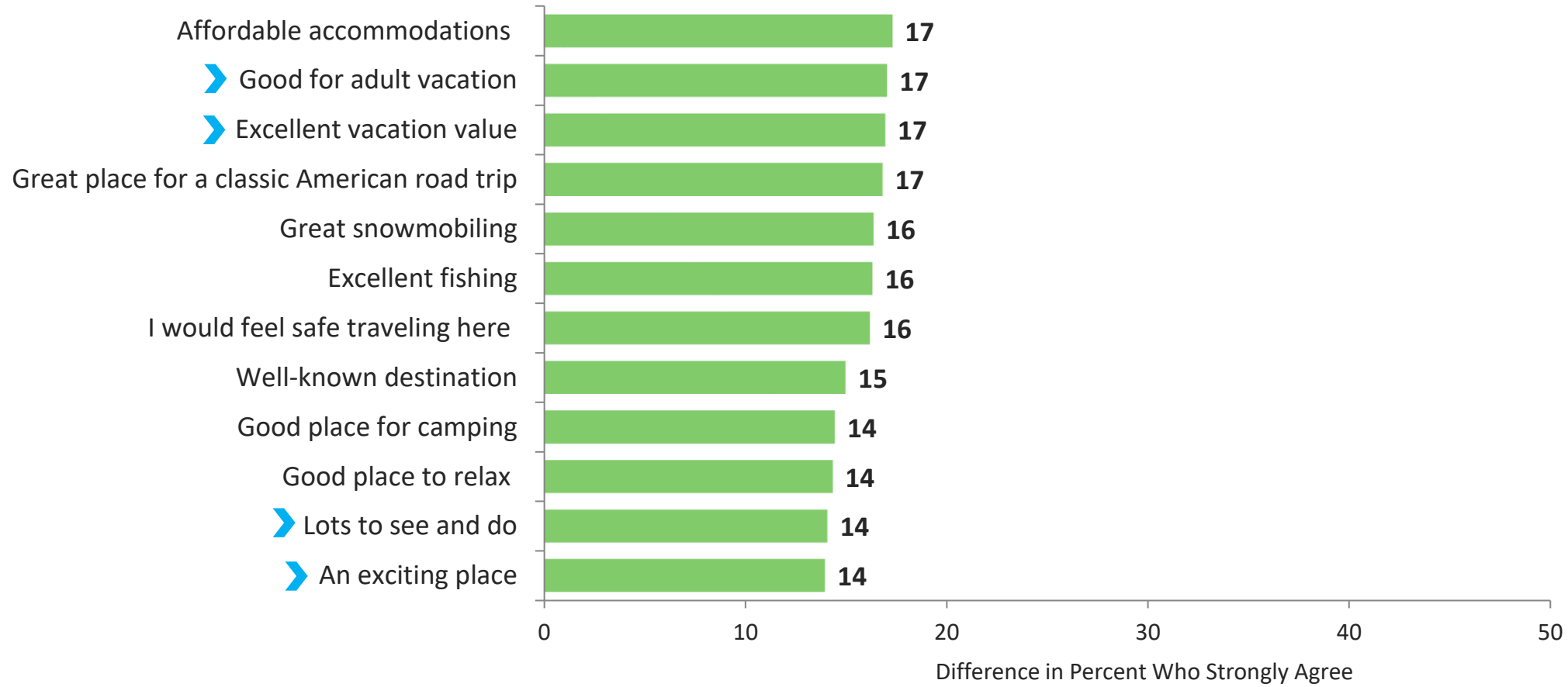
North Dakota's Product vs. Image



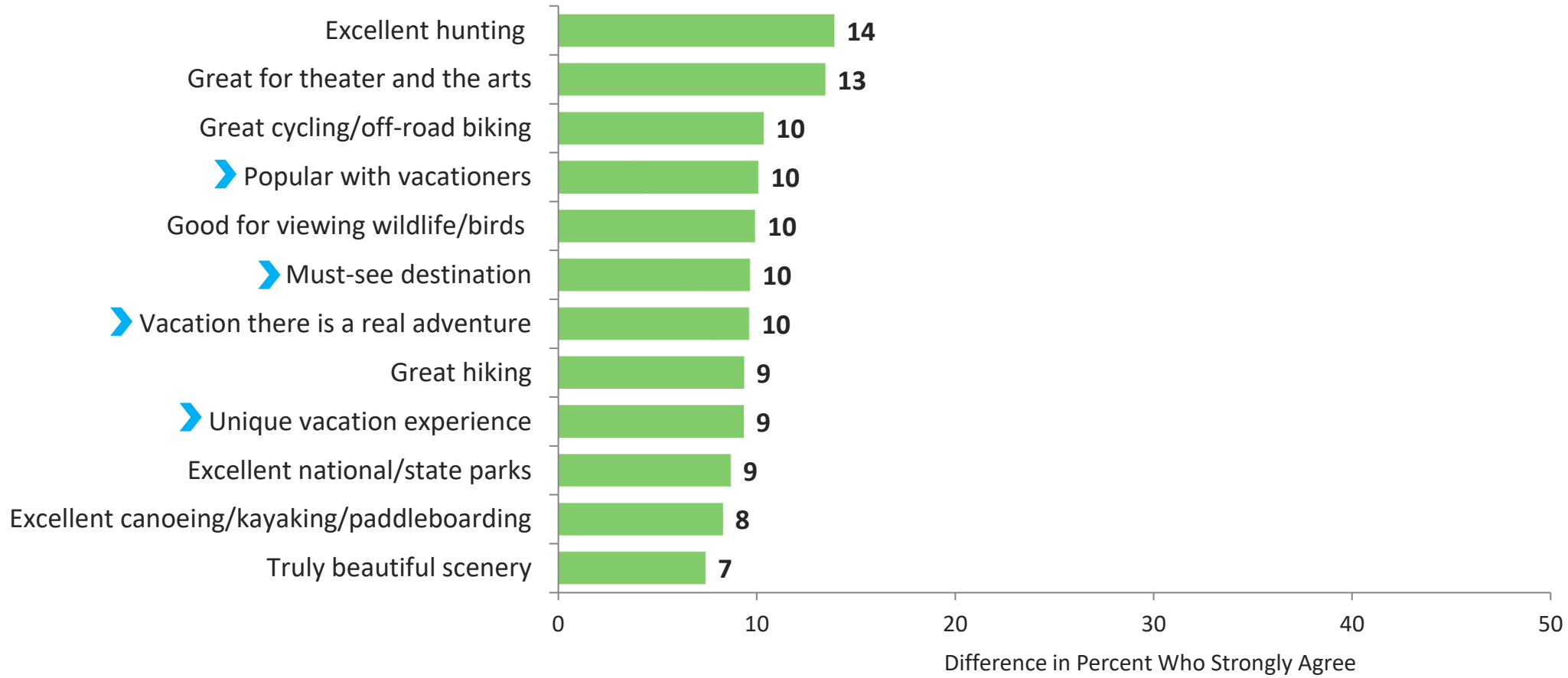
North Dakota's Product Strengths vs. Image



North Dakota's Product Strengths vs. Image (Cont'd)



North Dakota's Product Strengths vs. Image (Cont'd)



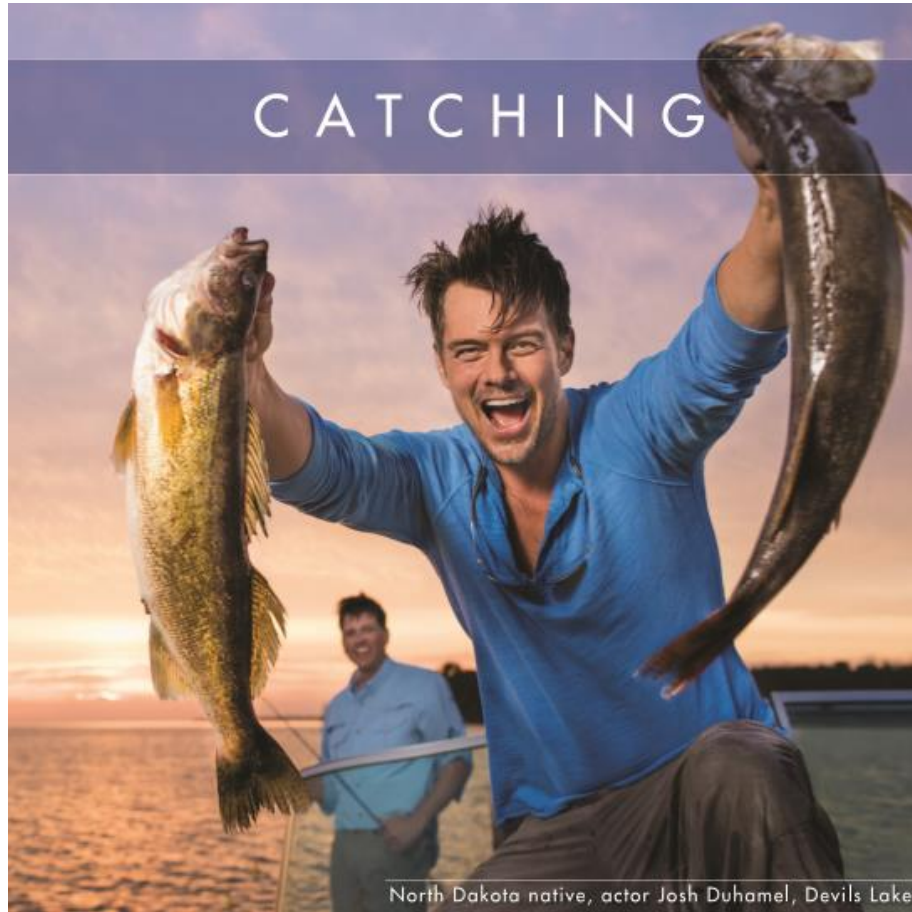
North Dakota's Product Weaknesses vs. Image

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



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North Dakota's Economic Development Image



Longwoods
INTERNATIONAL

Halo Effect on Economic Development Image

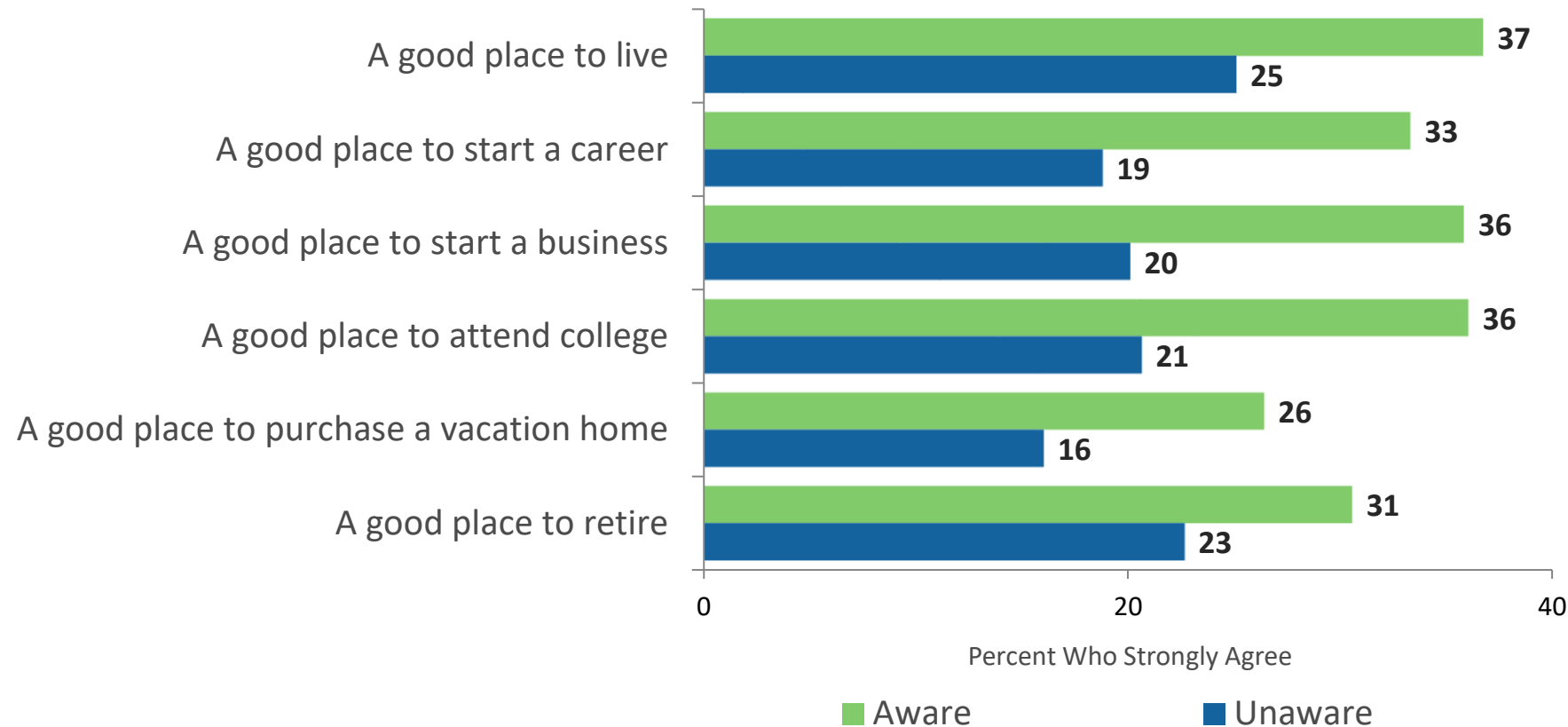
Halo Effect Analysis

- 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.

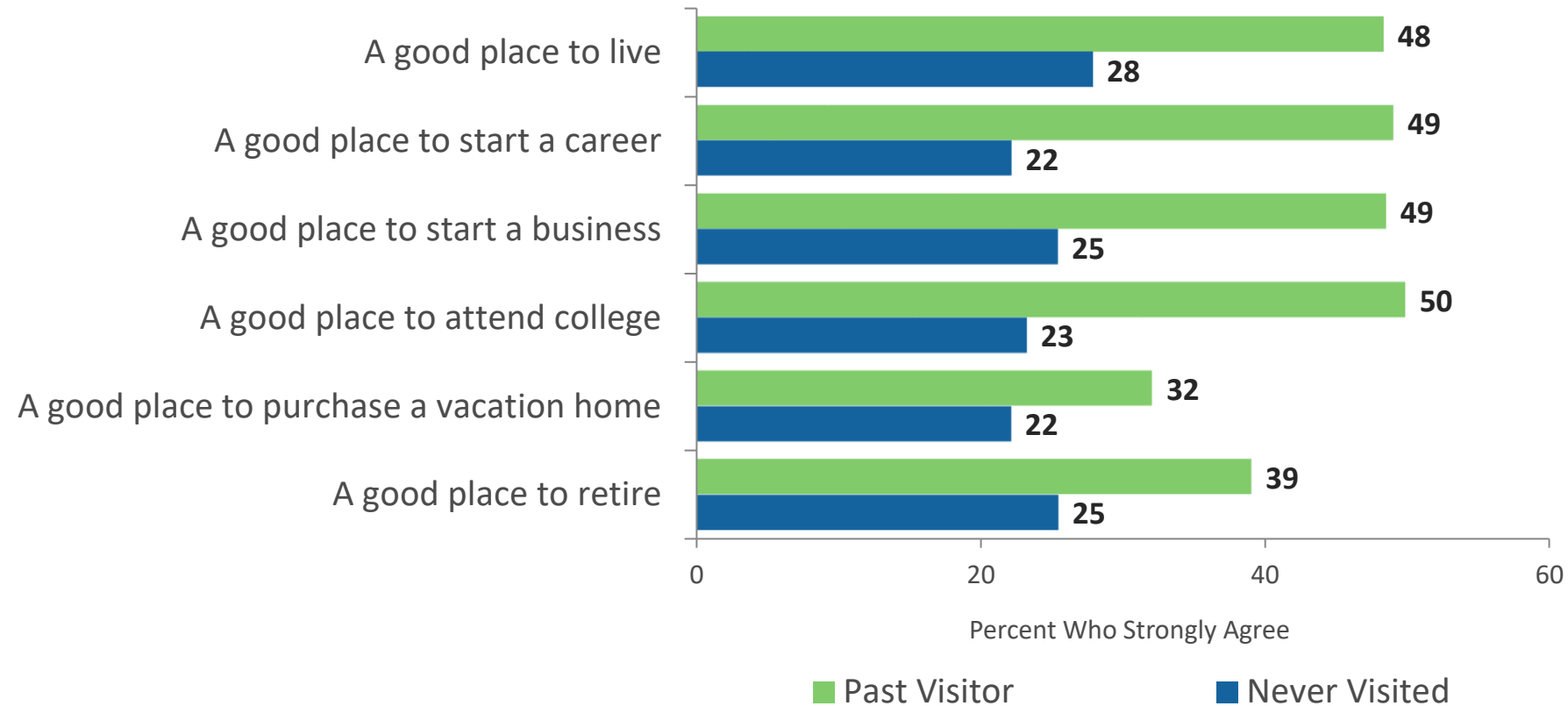
Halo Effect Analysis

- 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.

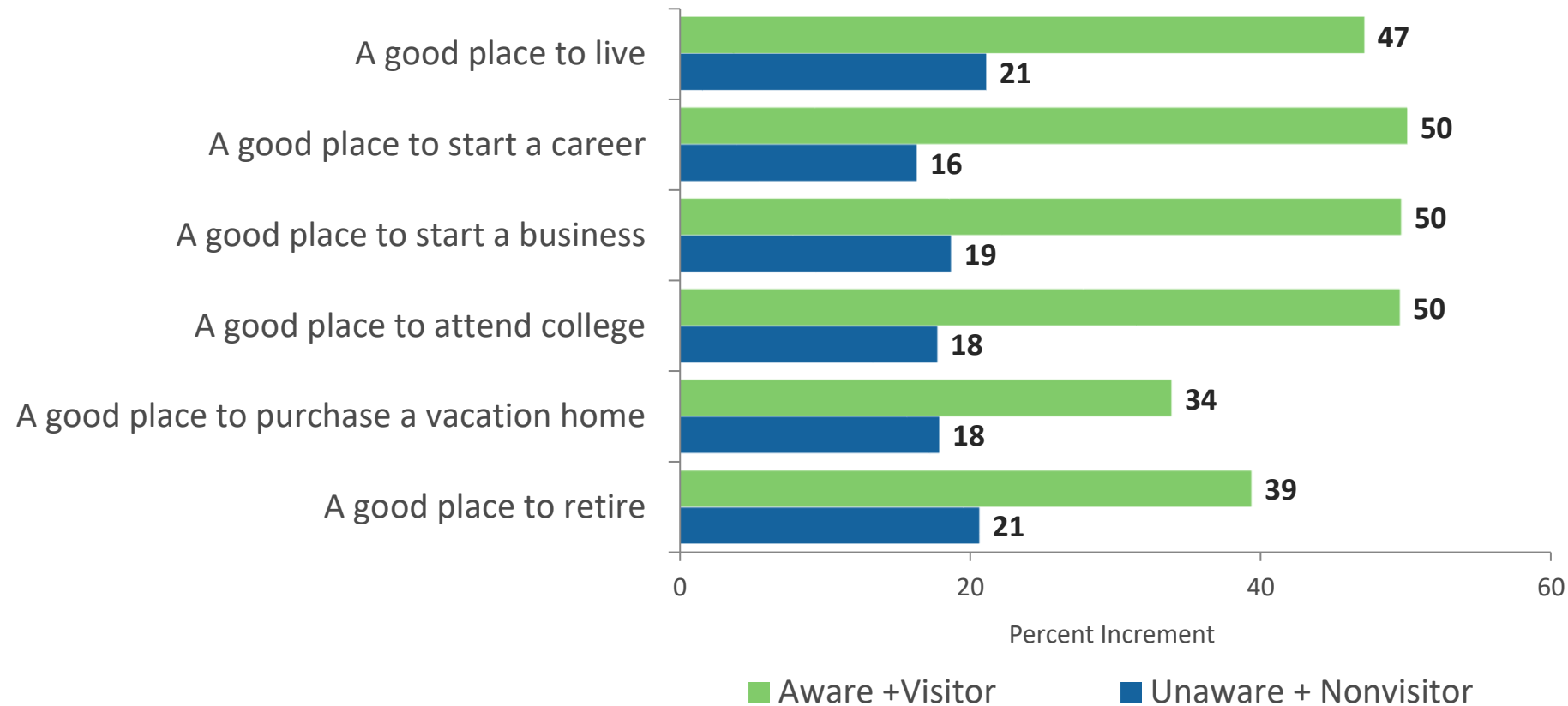
Impact of *Tourism Ad Awareness* on North Dakota's Economic Development Image



Impact of *Visitation* on North Dakota's Economic Development Image



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





For North Dakota native and actor Josh Duhamel, a visit to his home state is music to his ears. Join the scene for downtown street fairs, wine walks, ribfests, farmers markets, music festivals and much more. Visit us online to learn more and plan your getaway.

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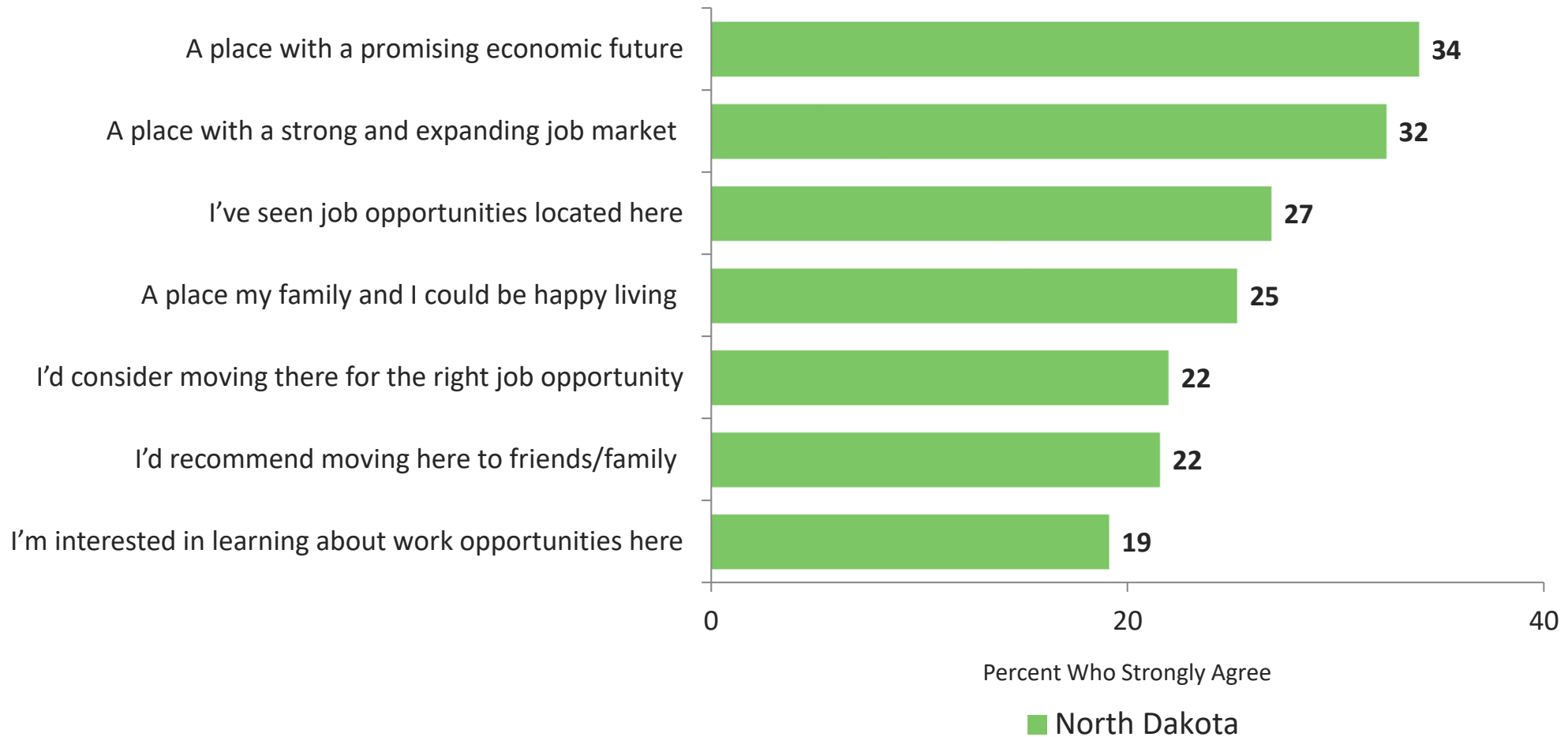
Longwoods
INTERNATIONAL

Economic Development Attributes

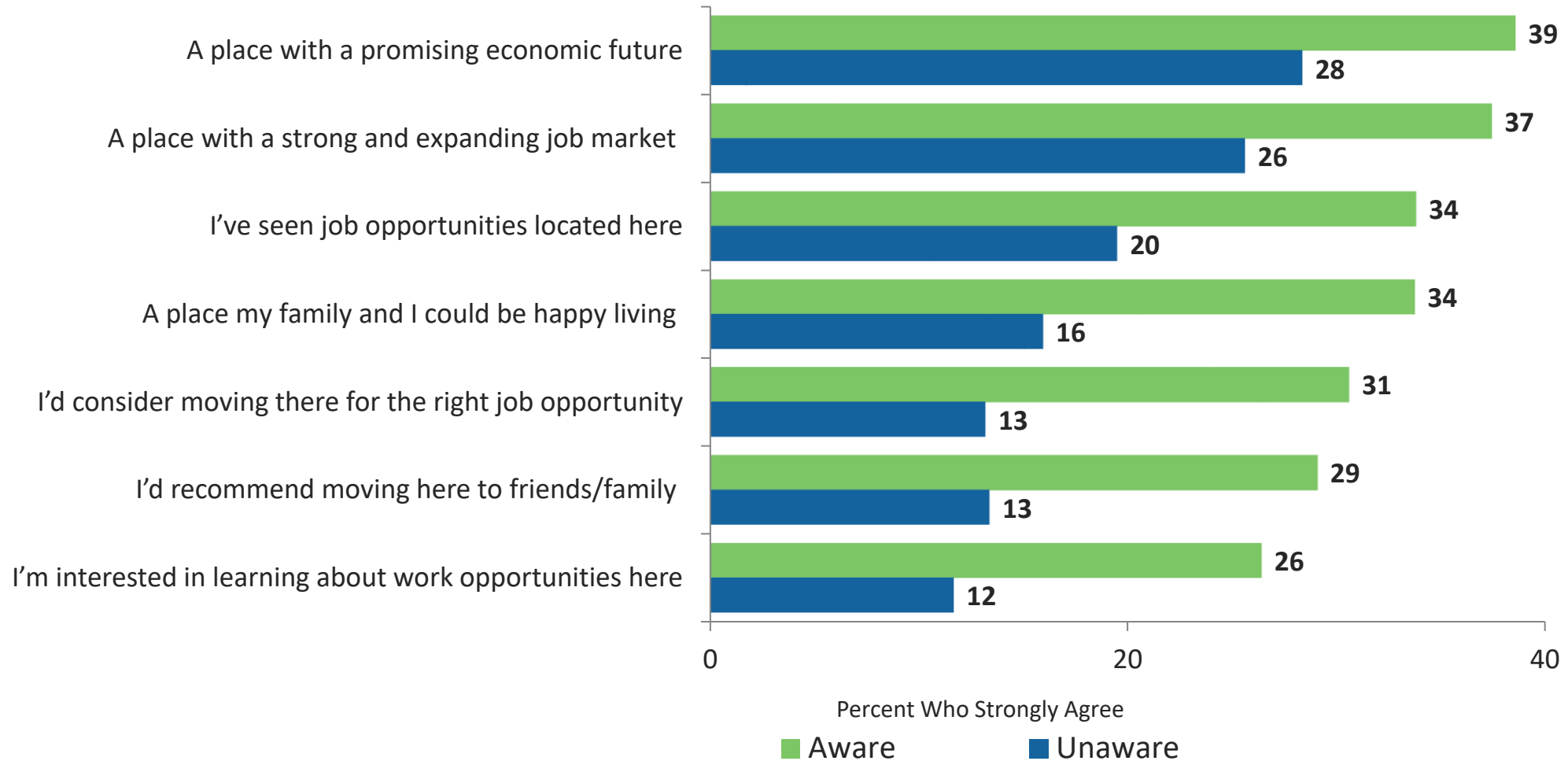
Economic Development Attributes

- 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'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.

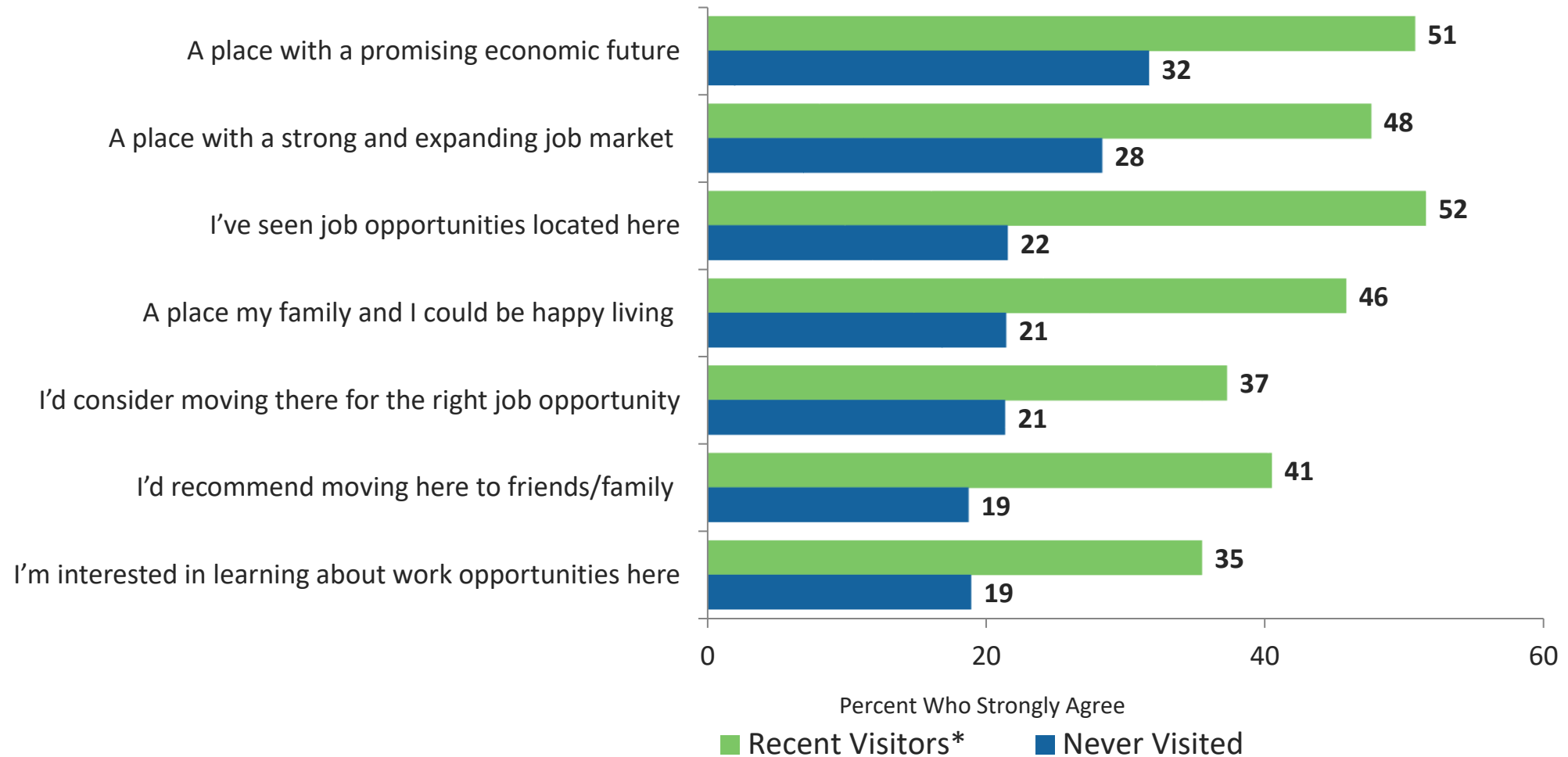
North Dakota's Economic Development Attributes



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



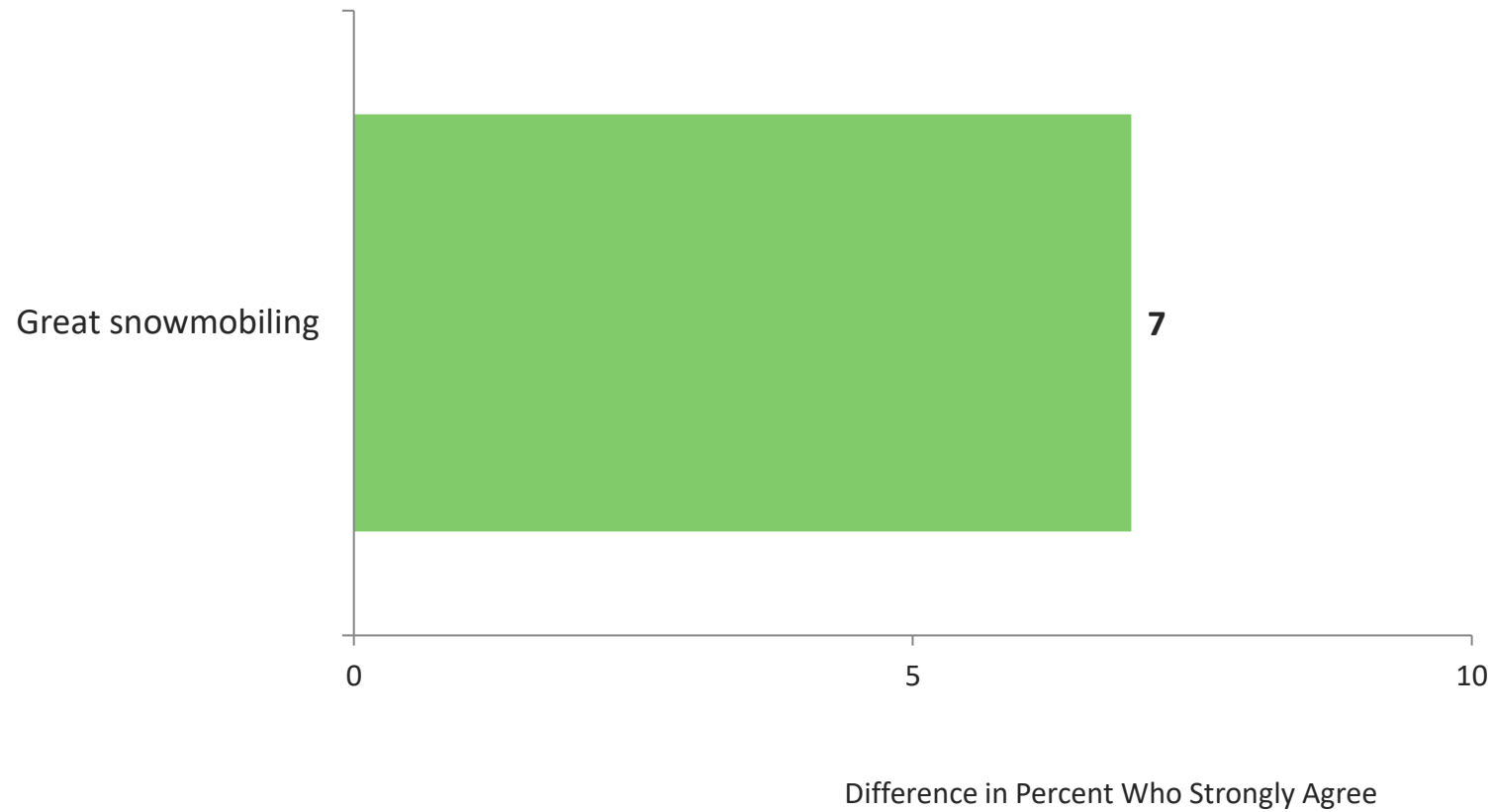
Impact of Visitation on North Dakota's Economic Development Attributes



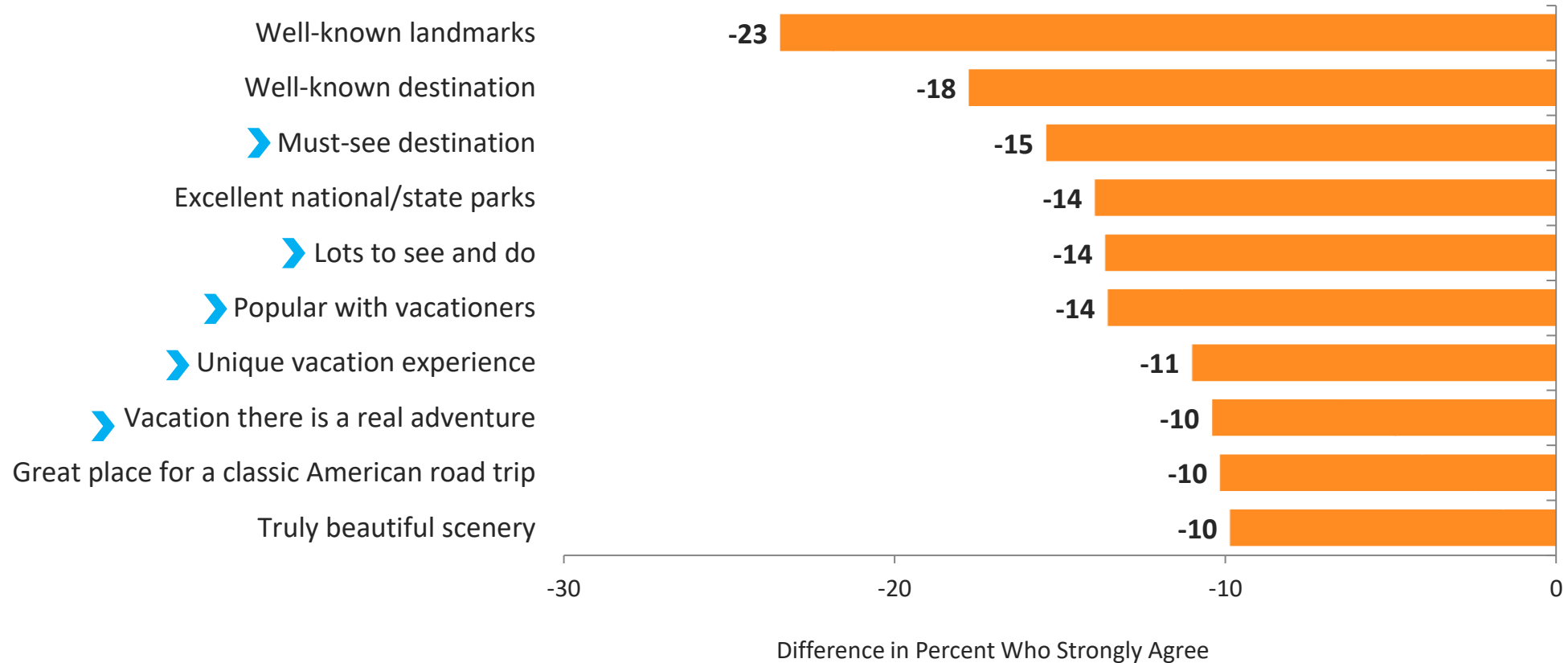


Appendix: North Dakota's Image Strengths & Weaknesses vs. Individual Competitors

North Dakota's Image Strengths vs. South Dakota

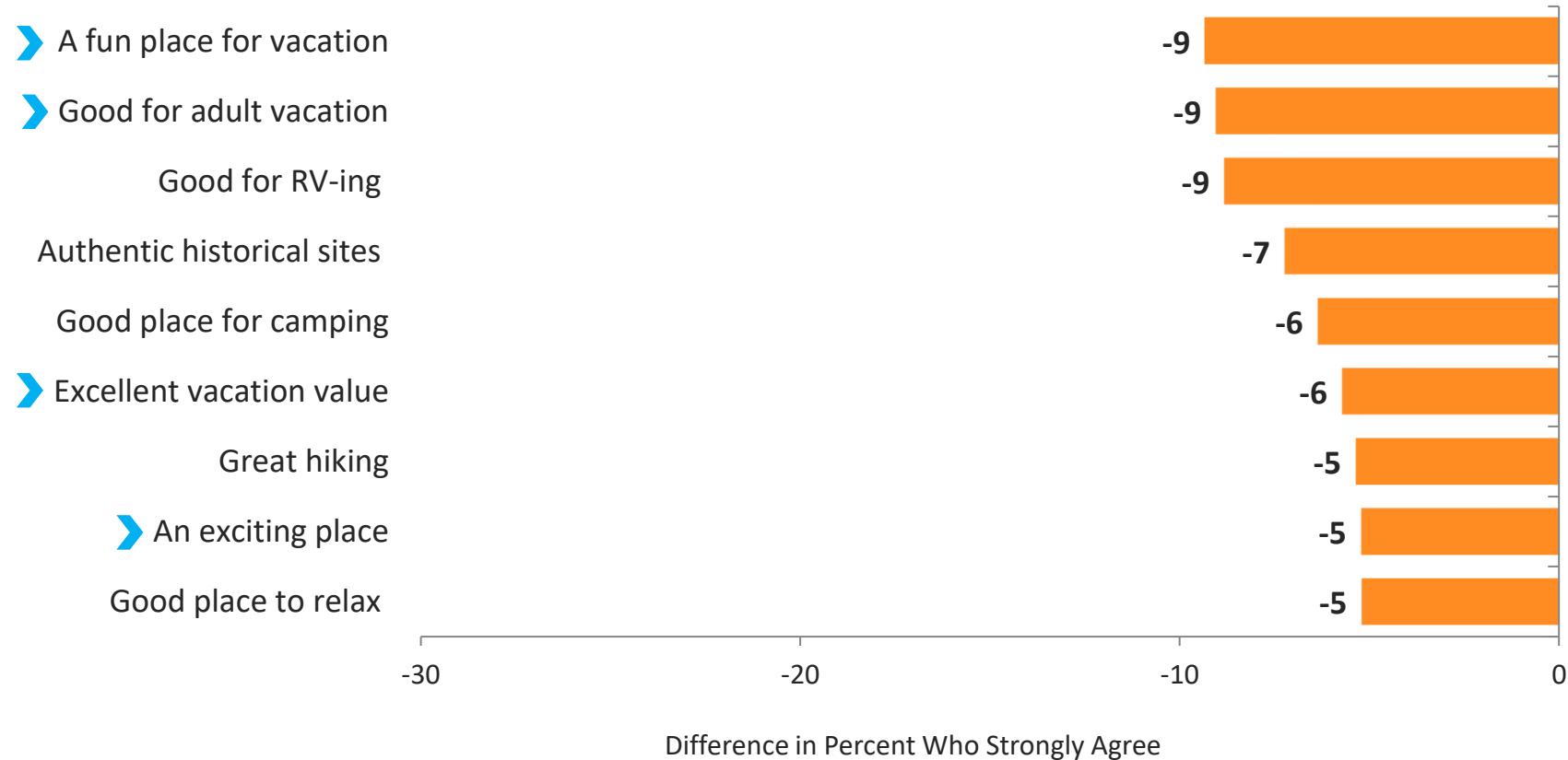


North Dakota's Image Weaknesses vs. South Dakota



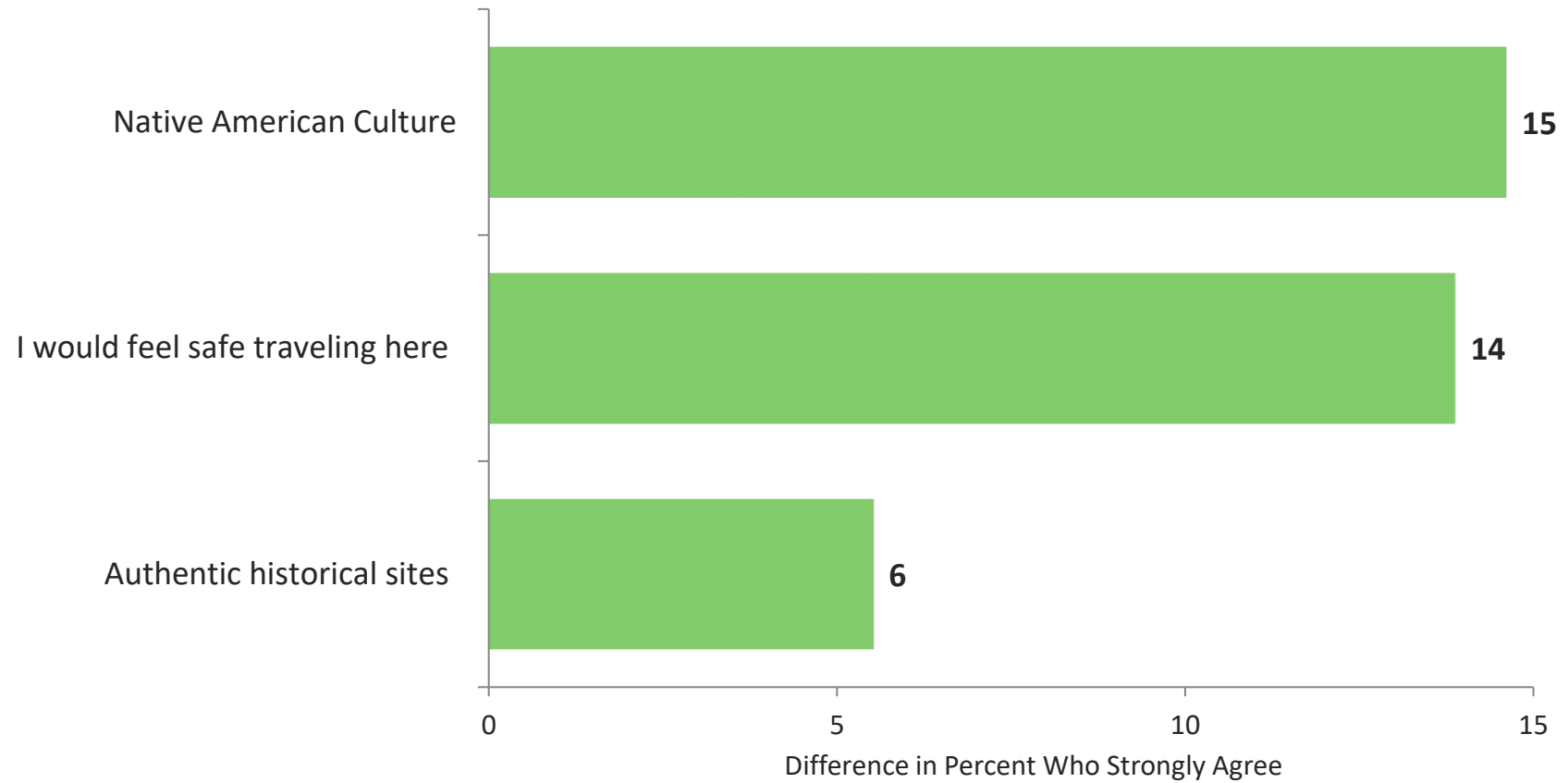
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

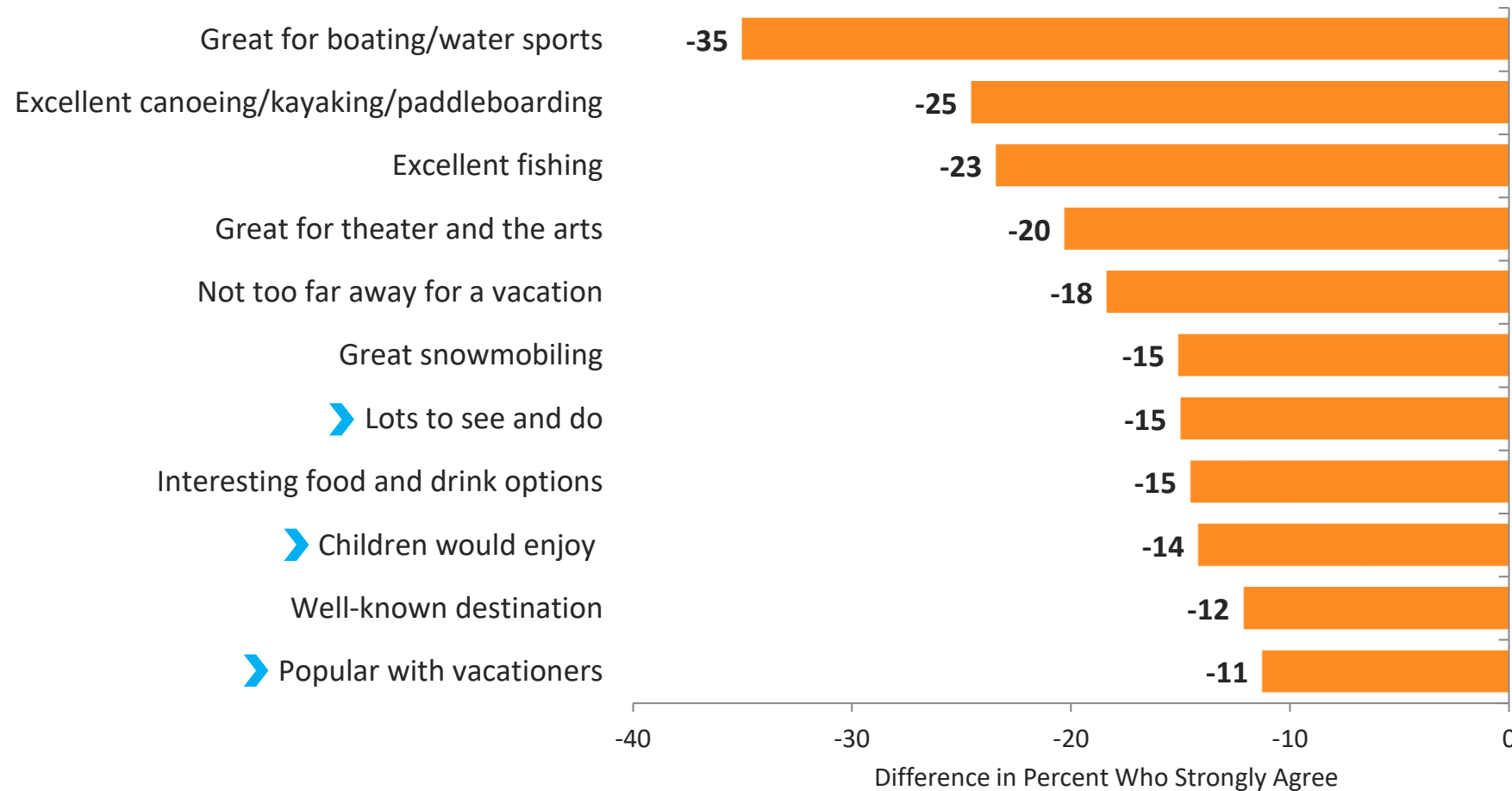


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

North Dakota's Image Strengths vs. Minnesota

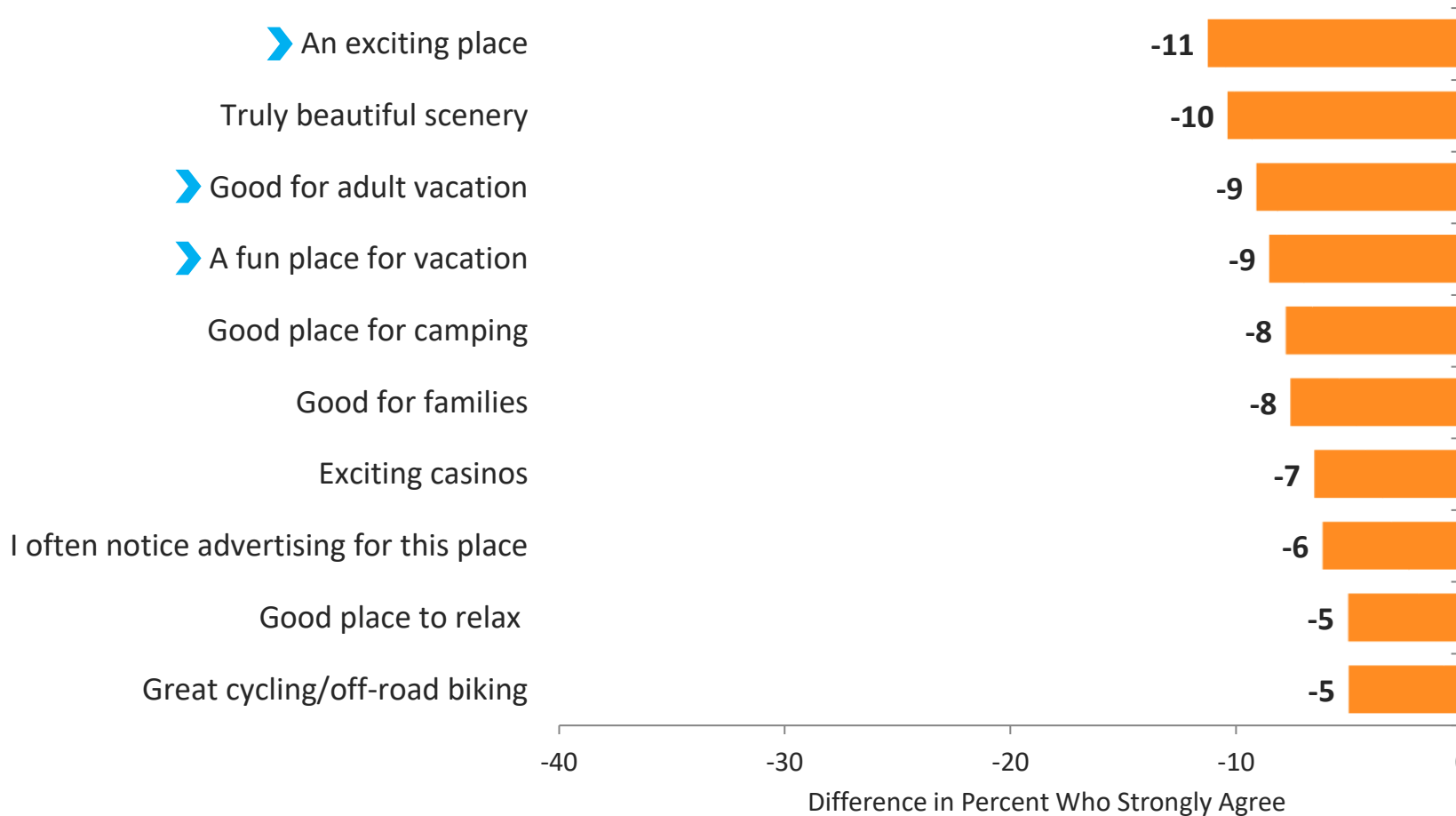


North Dakota's Image Weaknesses vs. Minnesota



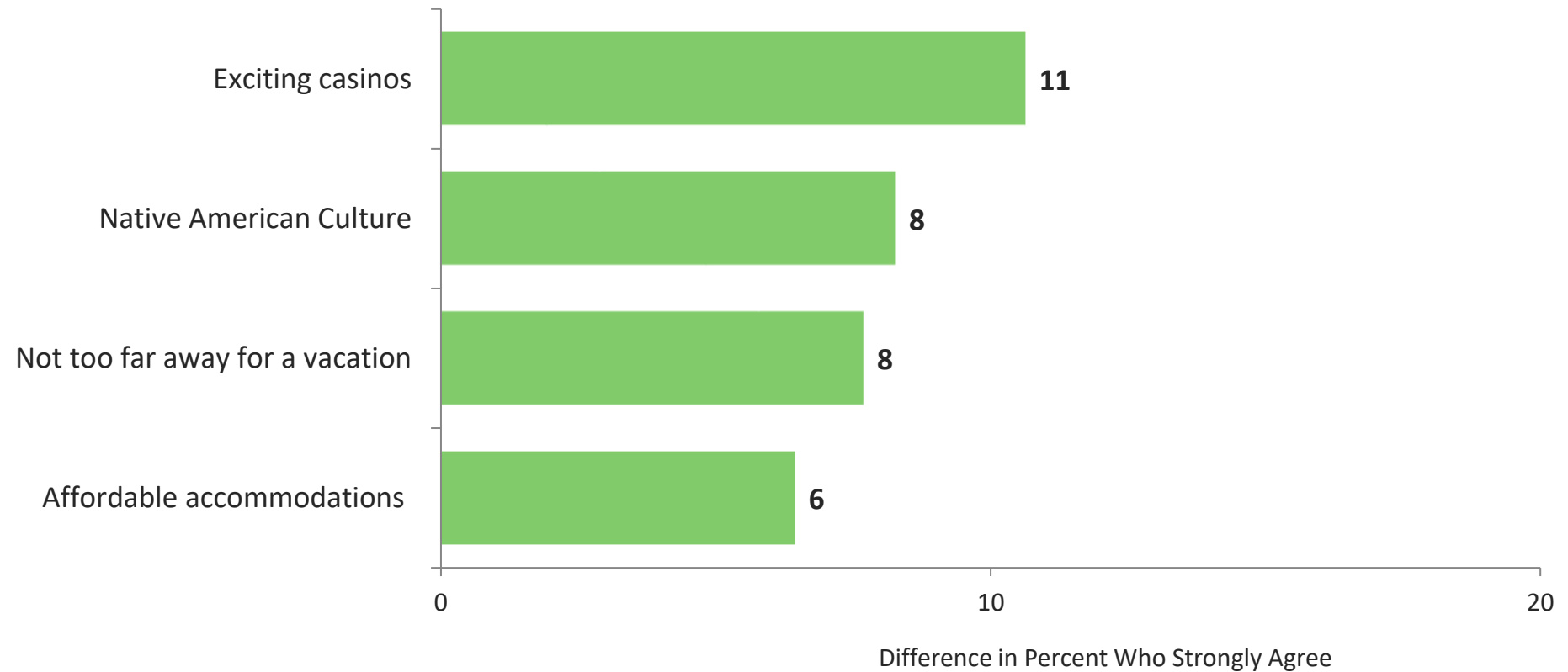
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

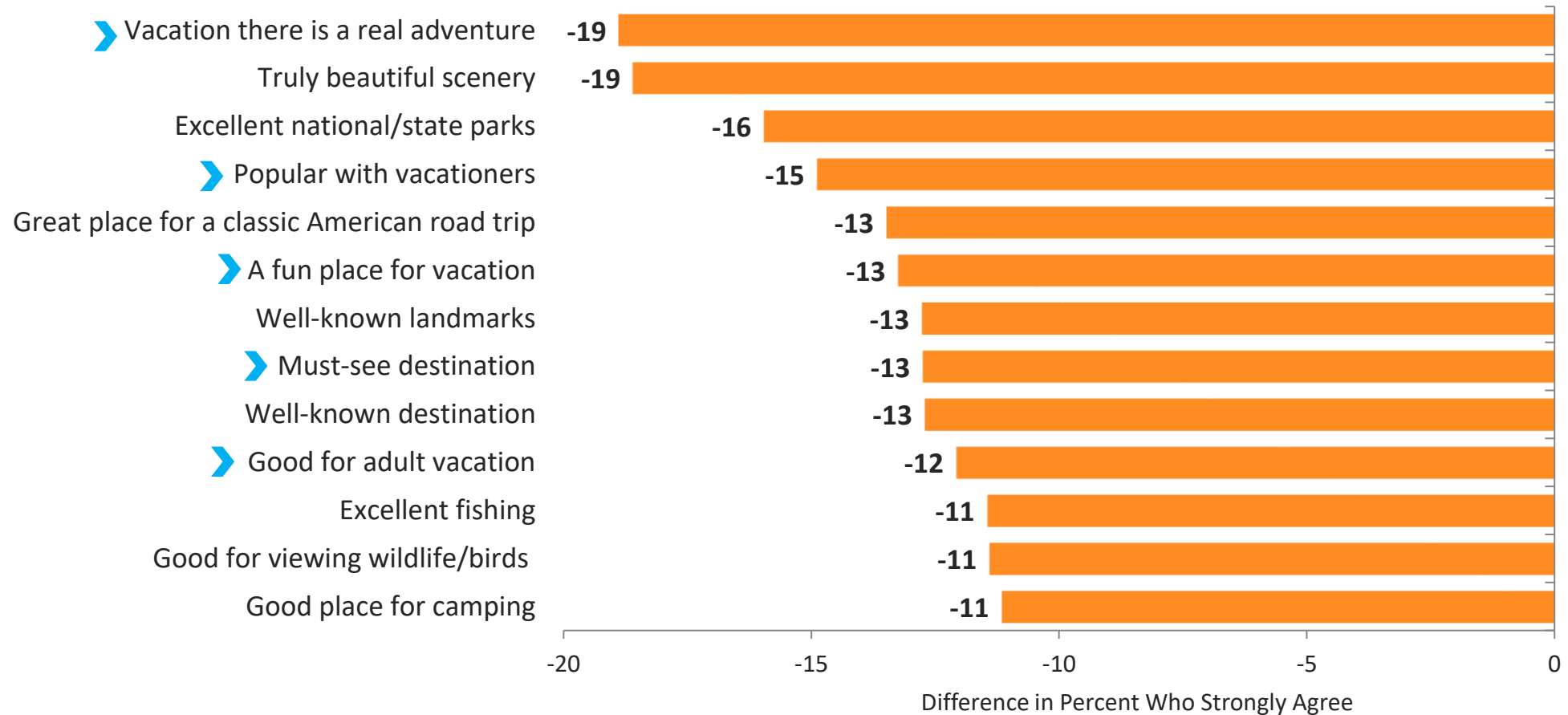


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

North Dakota's Image Strengths vs. Wyoming

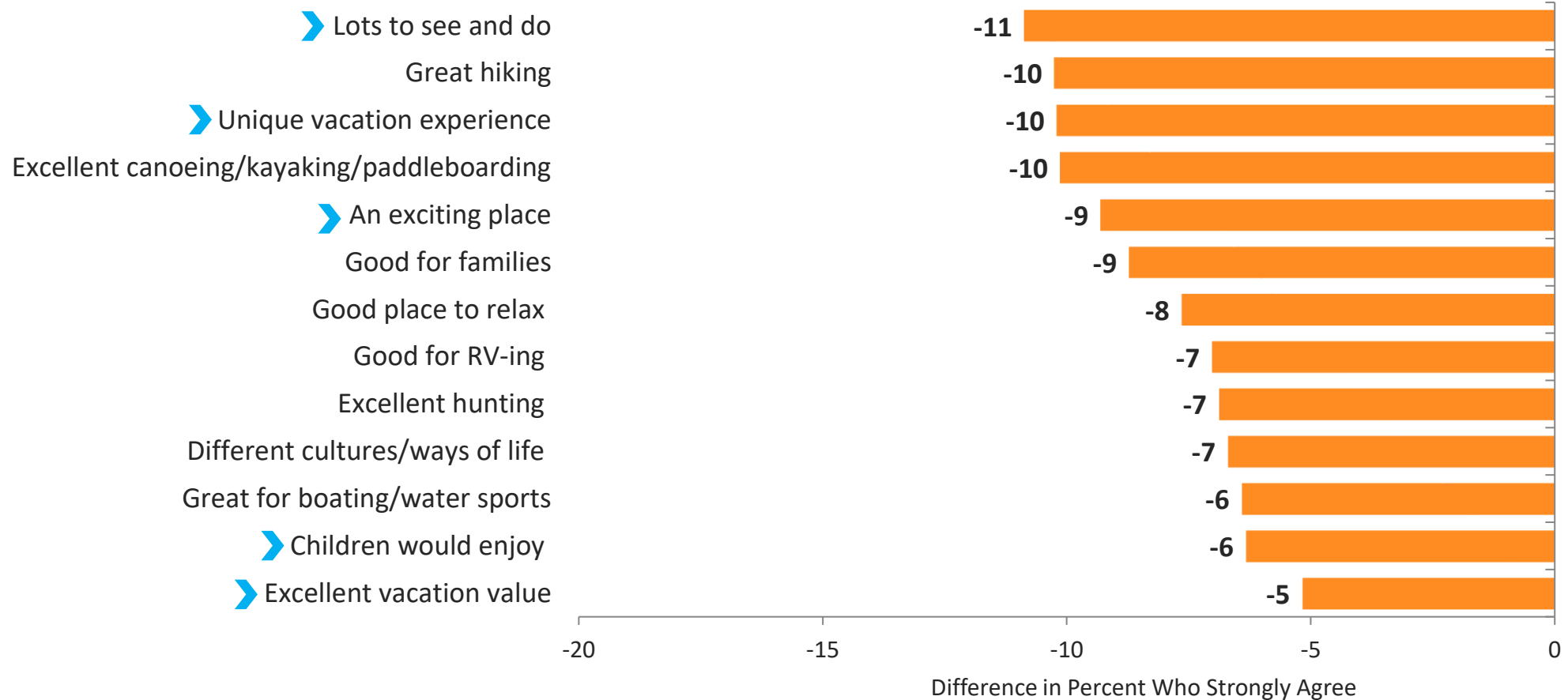


North Dakota's Image Weaknesses vs. Wyoming



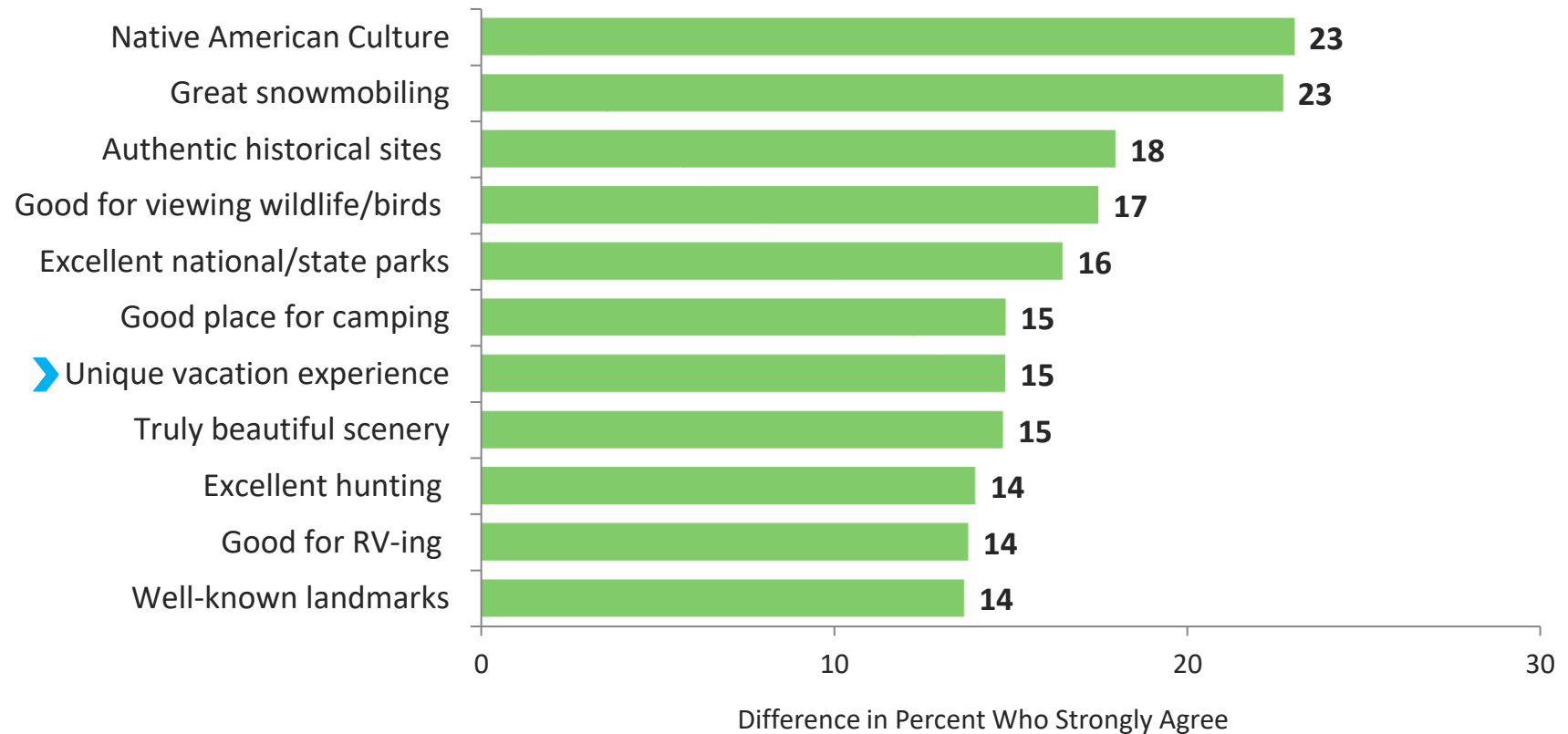
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



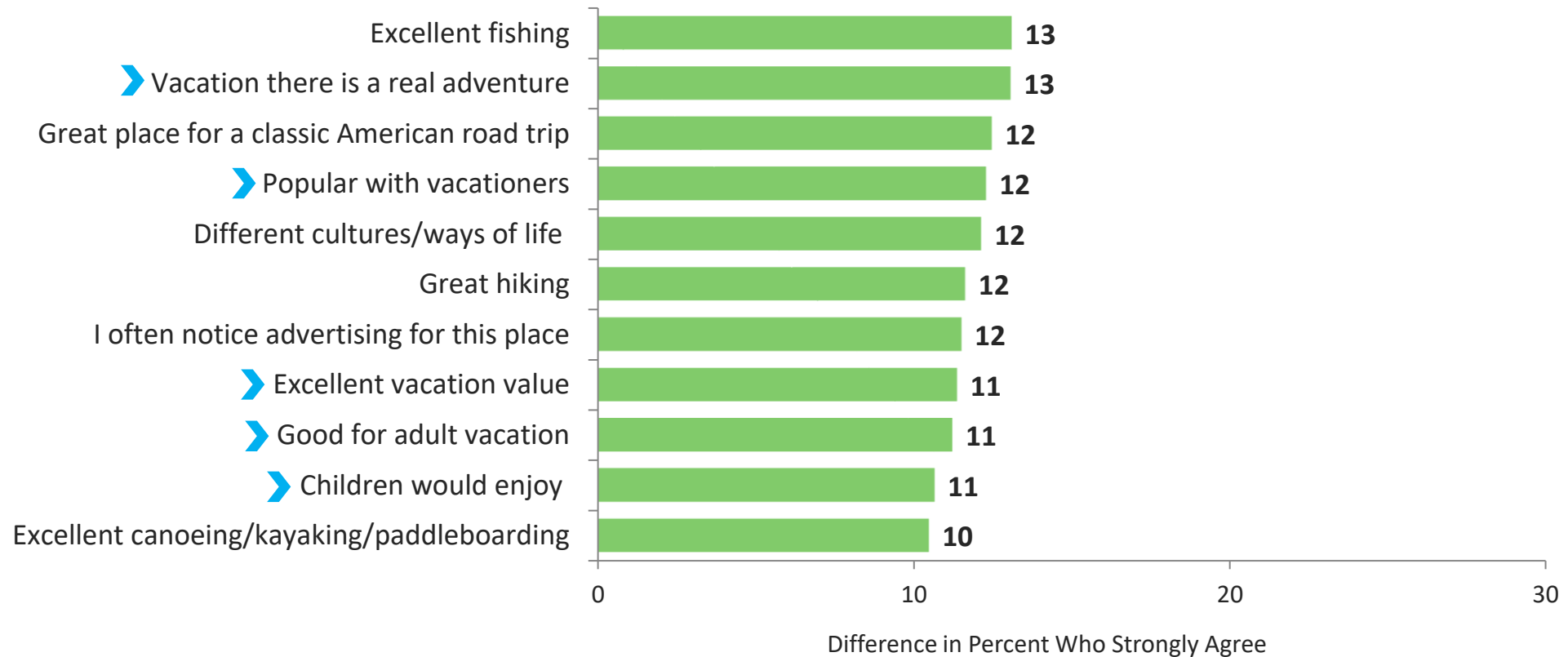
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

North Dakota's Image Strengths vs. Nebraska



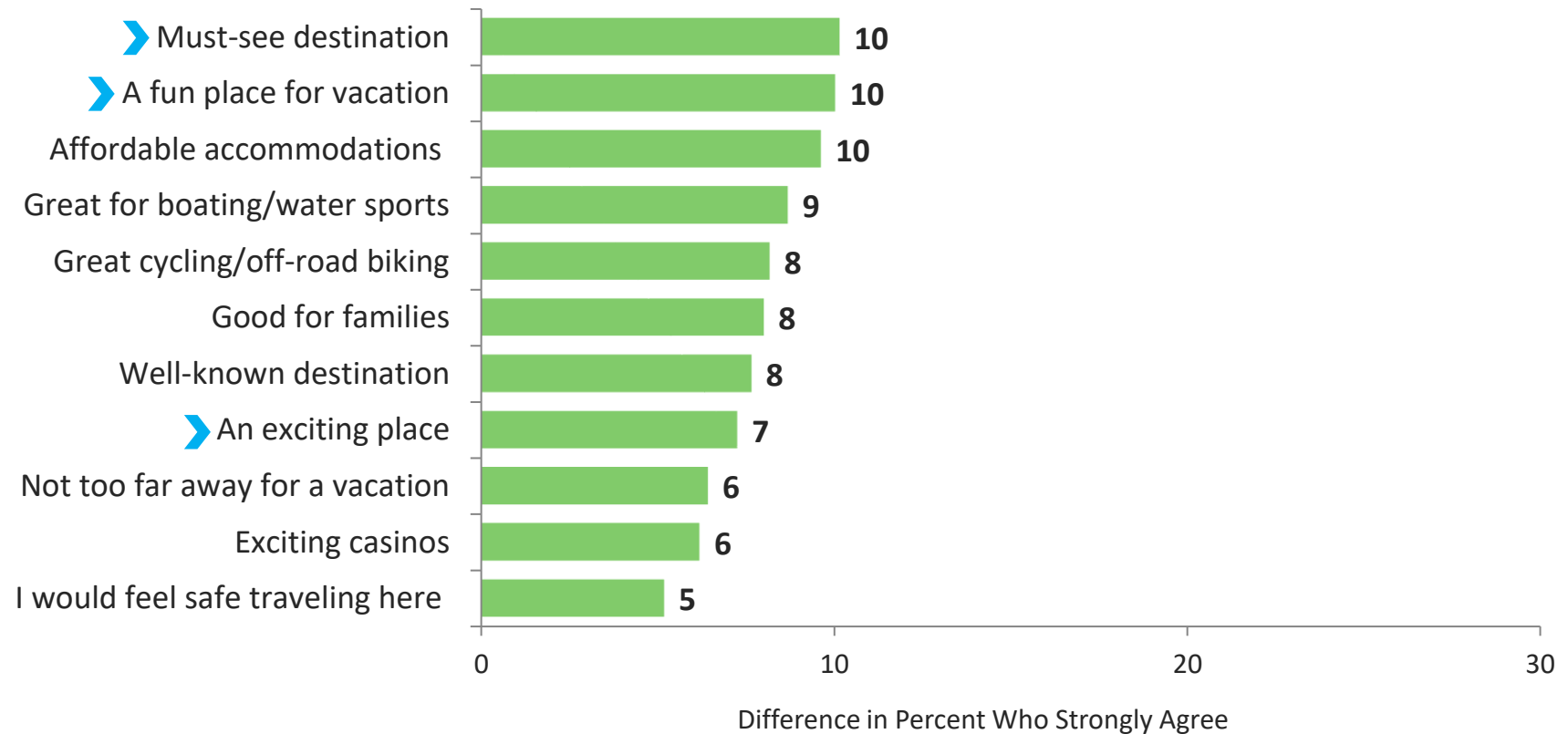
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

North Dakota's Image Strengths vs. Nebraska (Cont'd)



* 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)

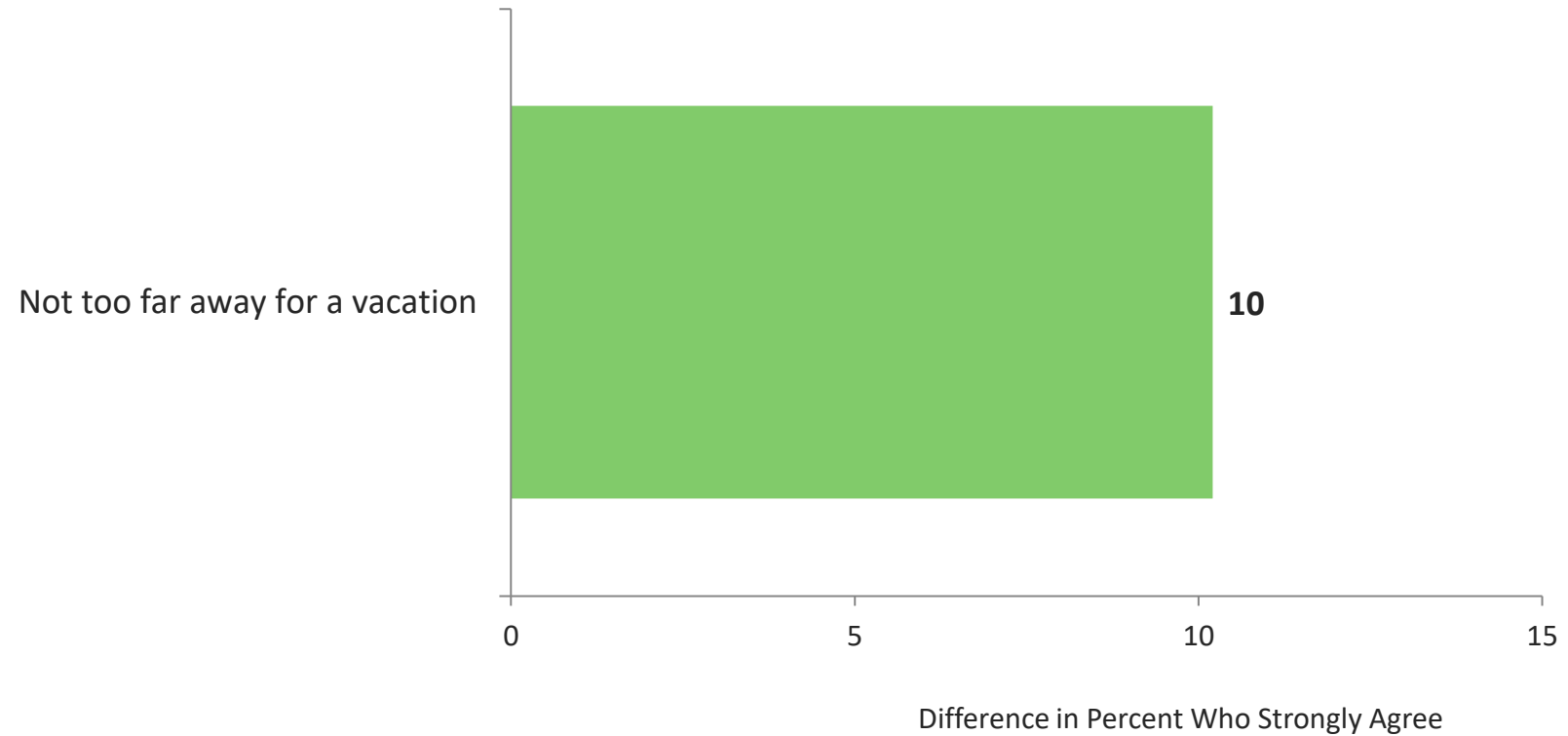


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

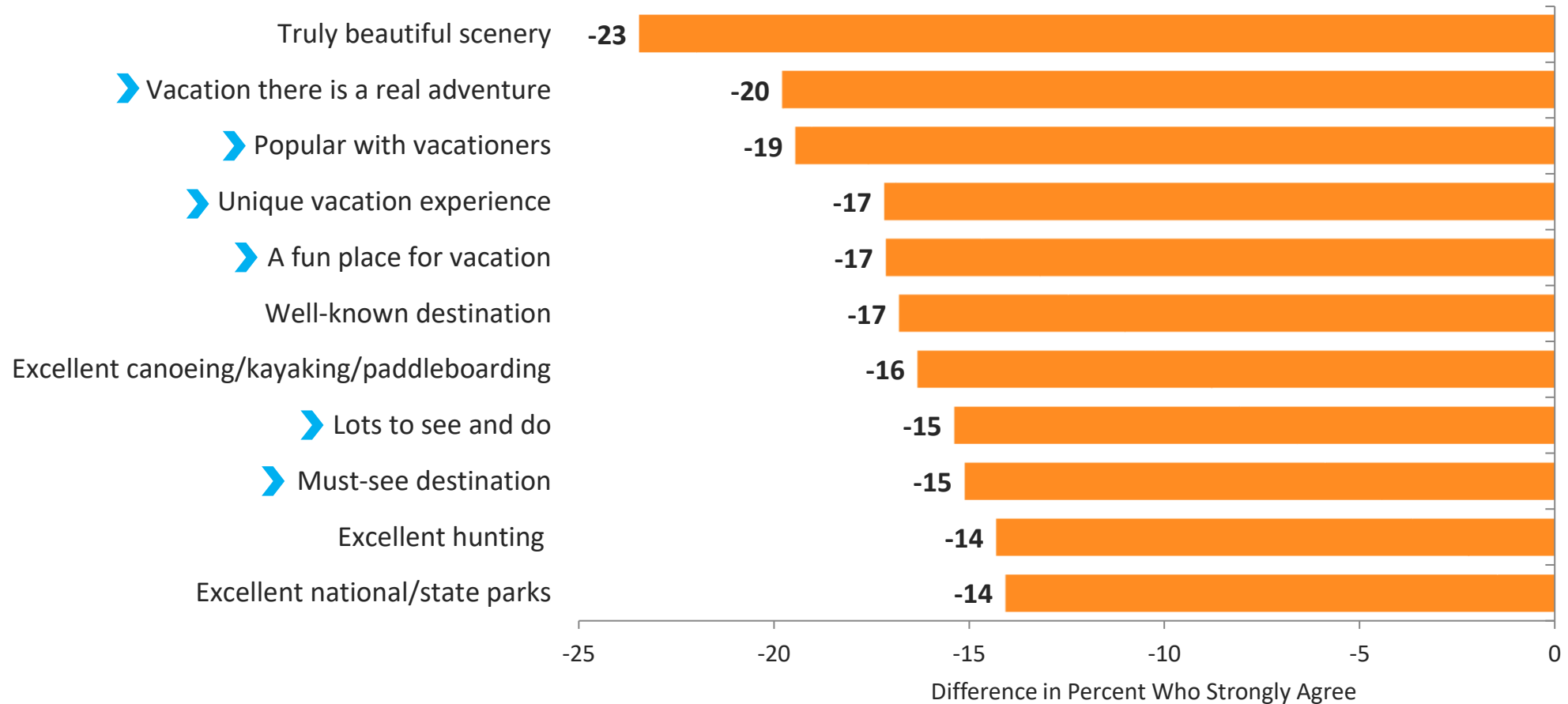
North Dakota's Image Weaknesses vs. Nebraska

**THERE WERE NO SIGNIFICANT
PERCEIVED IMAGE WEAKNESSES
VS. NEBRASKA**

North Dakota's Image Strengths vs. Montana

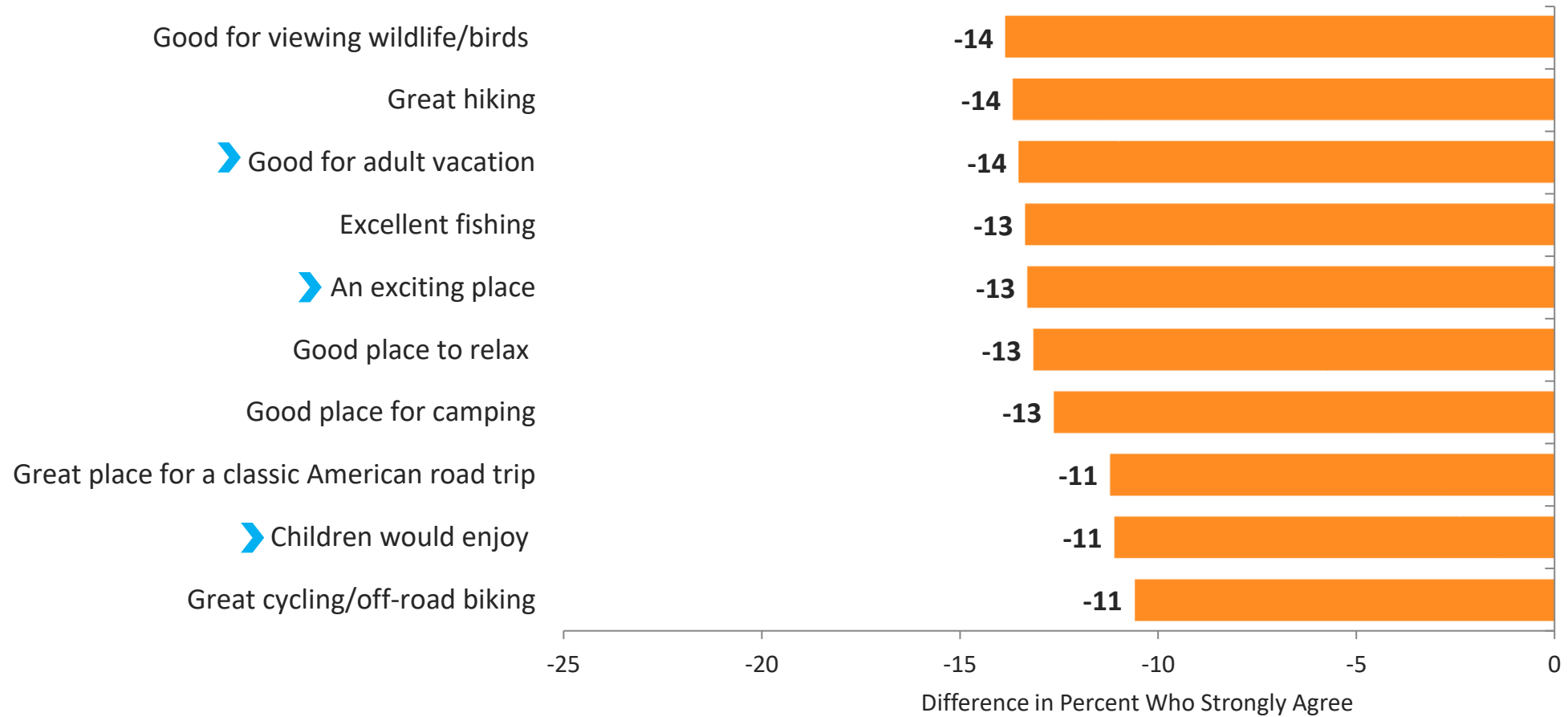


North Dakota's Image Weaknesses vs. Montana



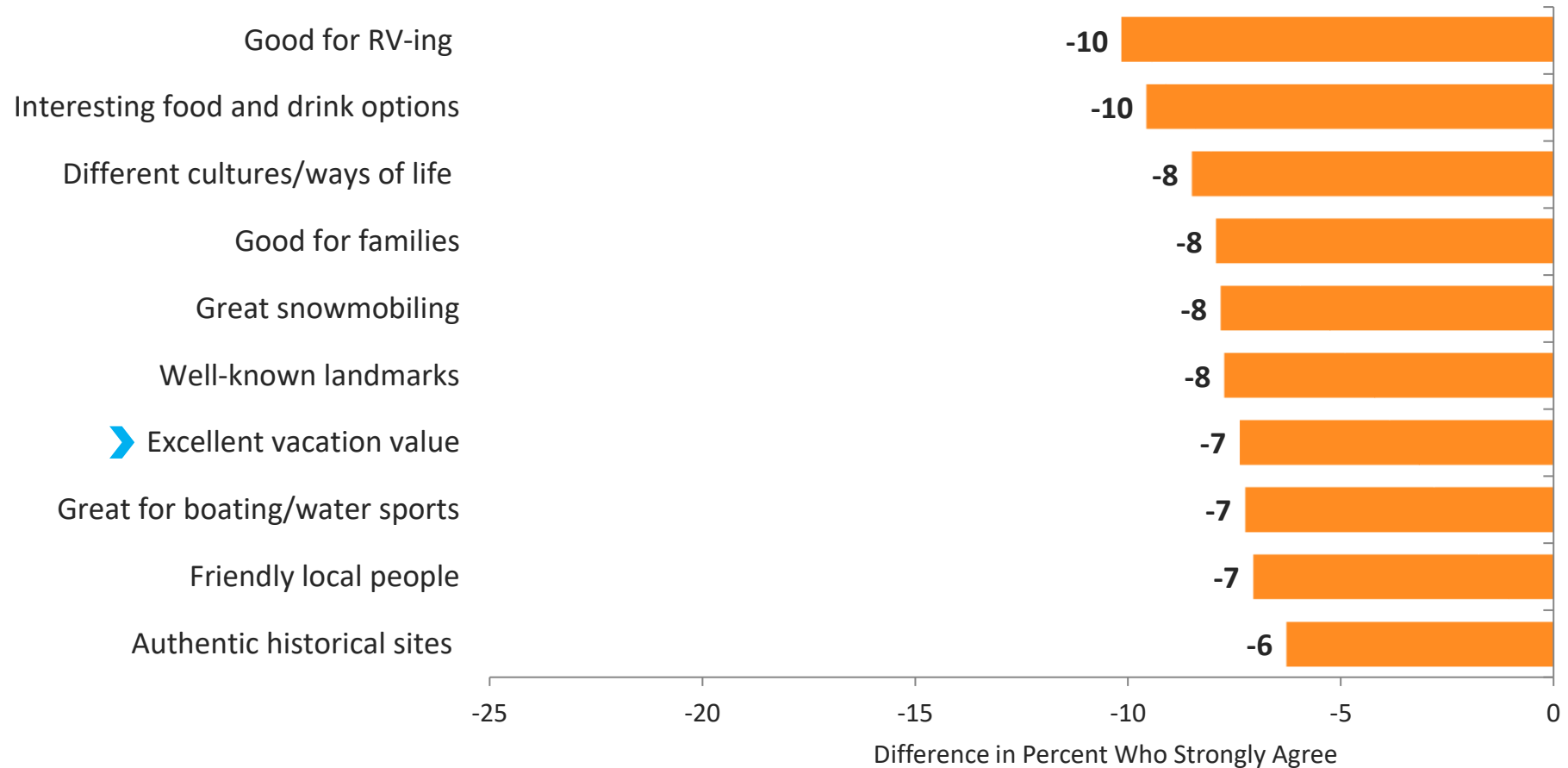
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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



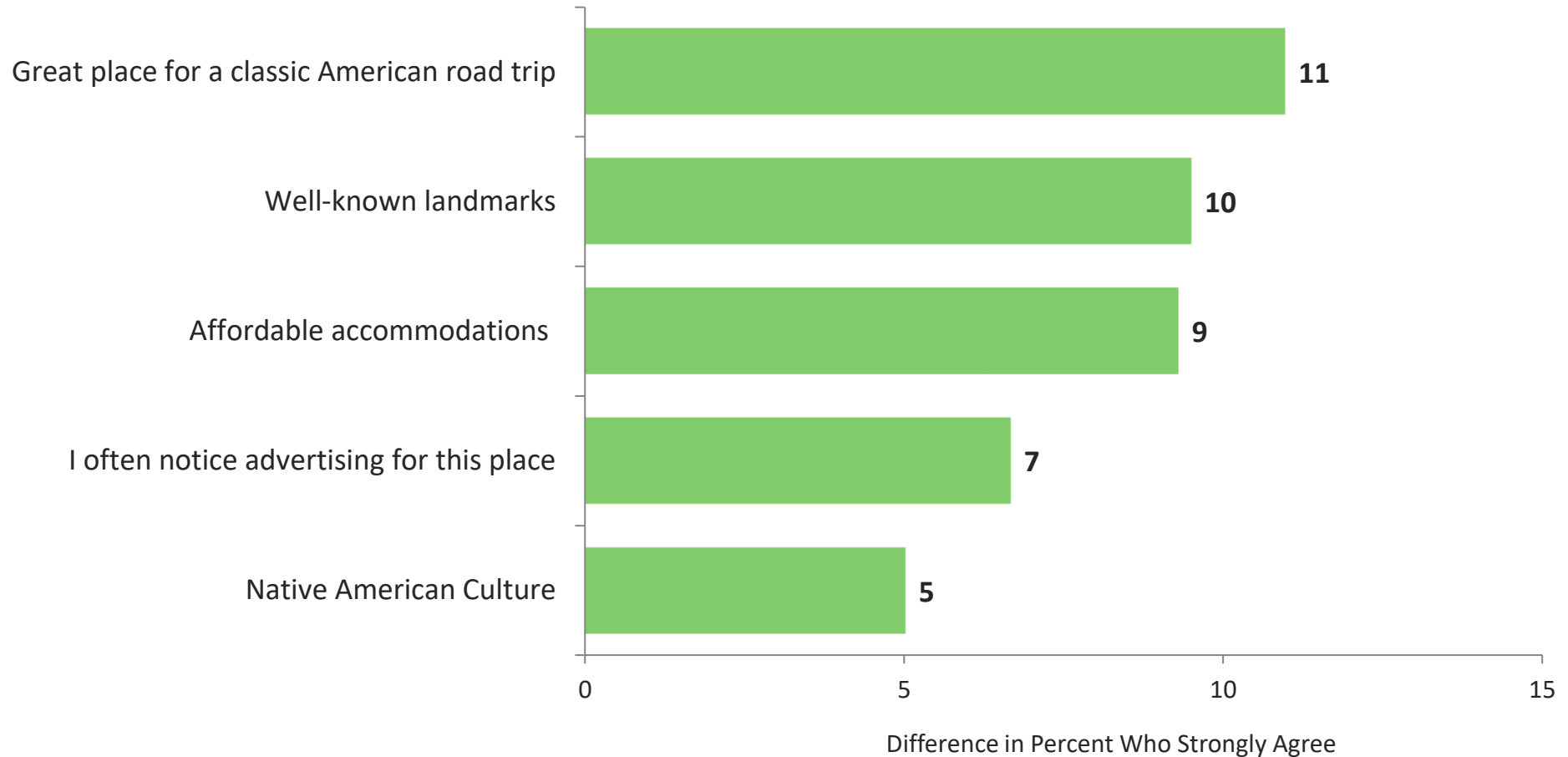
* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

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

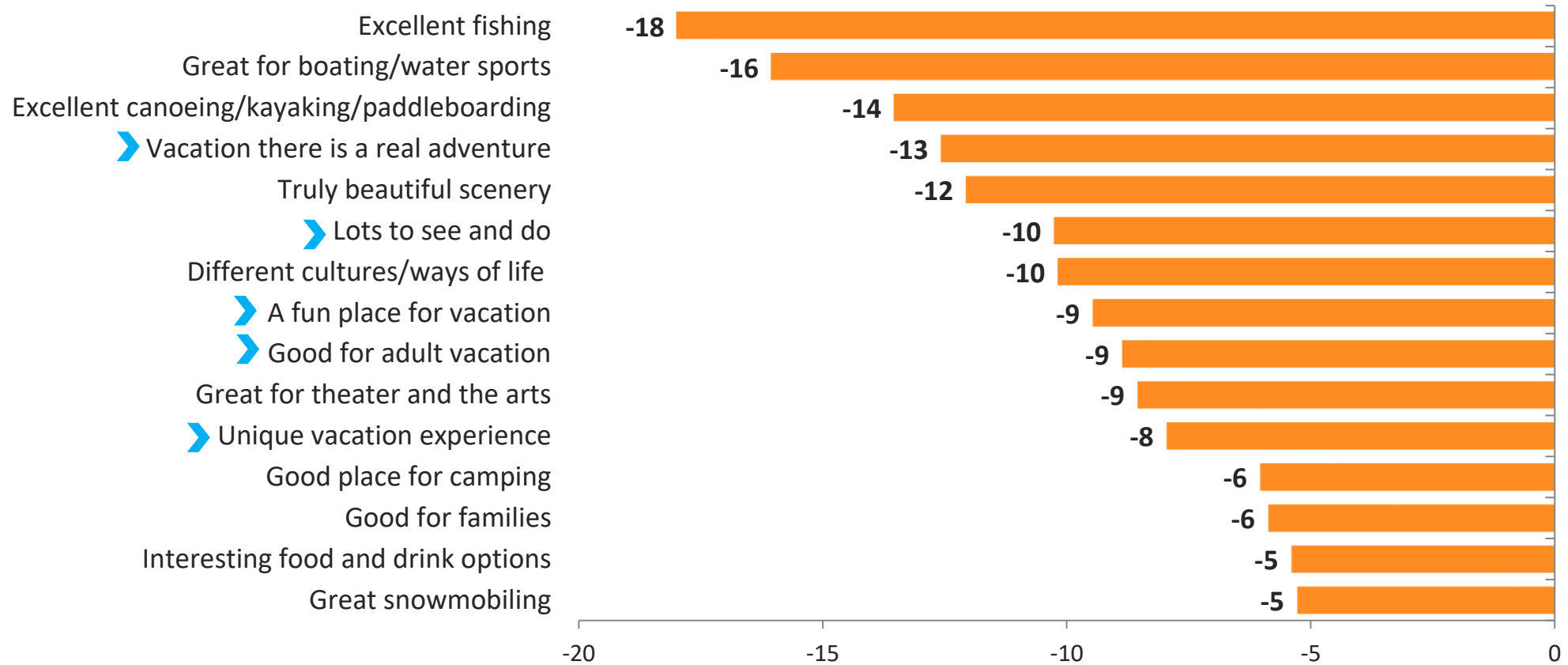


* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

North Dakota's Image Strengths vs. Manitoba



North Dakota's Image Weaknesses vs. Manitoba



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