

NORTH
Dakota

Be Legendary.

Tourism & Marketing

COMMERCE



STAKEHOLDER SURVEY SUMMARY

January 4, 2022

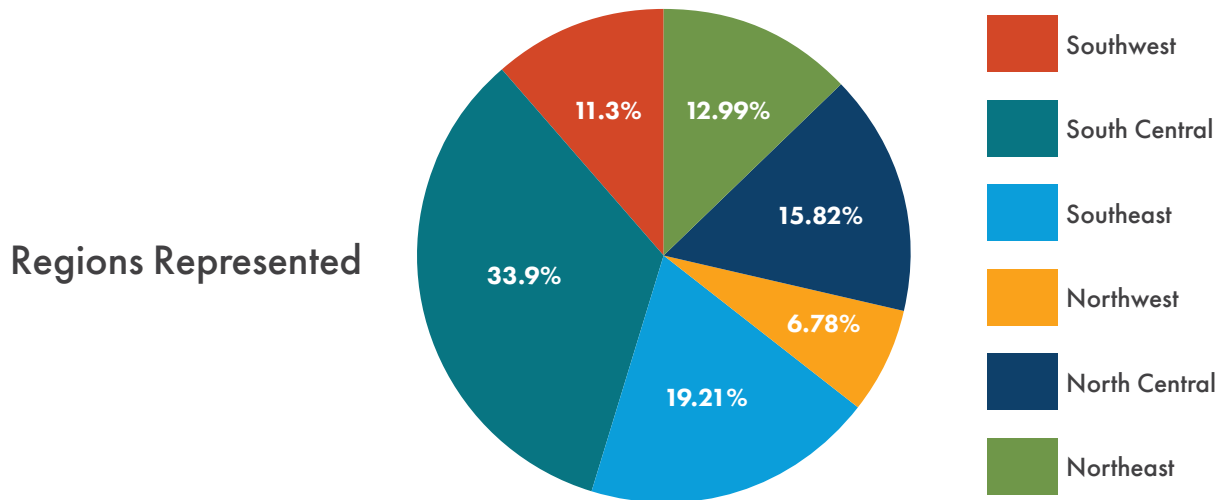
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METHODOLOGY

The North Dakota Tourism & Marketing Stakeholder Survey was introduced during the Tourism & Marketing Division's annual Travel Industry Marketing Summit, Oct. 26. A link to the survey went out to 5,579 partners in our database on Oct. 28. In addition, the survey was promoted in the Tourism & Marketing Division newsletter, Department of Commerce newsletter, through partner newsletters and emails, and during the Travel Industry Marketing Summit and Travel Industry Chat. The survey closed on Dec. 3, with a total of 177 completions.

Survey respondents represented all geographical regions of the state and multiple user groups as shown below.



ENTITY REPRESENTED	TOTAL RESPONDENTS	PERCENTAGE
Interested citizen	24	13.56%
Other state agency	20	11.30%
Local CVB, chamber, DMO/DMMO	15	8.47%
Accommodation, lodging, campground	13	7.23%
Attraction	12	6.78%
Local or state board member	12	6.78%
Other	12	6.78%
Historic site or experience	11	6.21%
Outdoor recreation	9	5.08%
Transportation	8	4.52%
Arts	6	3.39%
Event or festival	6	3.39%
Local elected official	5	2.82%
Retail and shopping	4	2.26%
Entertainment - theaters, etc.	3	1.69%
Federal partner	3	1.69%
Travel services	3	1.69%
Tribal organizations	3	1.69%
Education	2	1.13%
Media	2	1.13%
Restaurant	2	1.13%
State elected official	2	1.13%

SURVEY FINDINGS

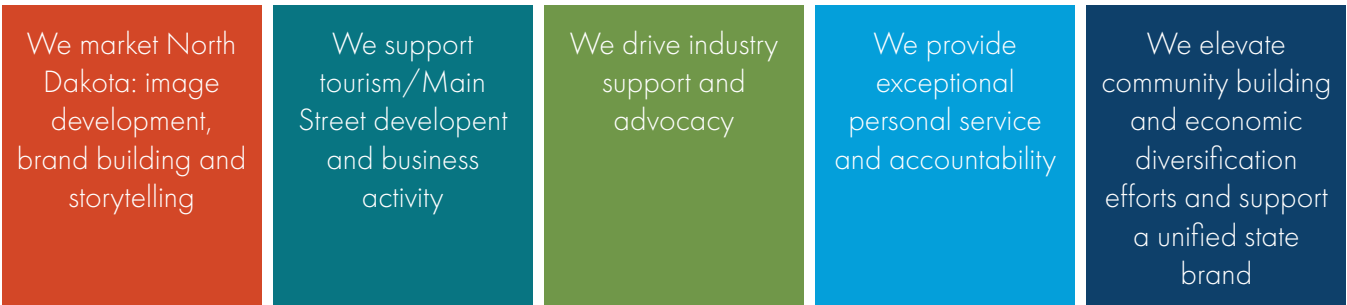
On the question of the Tourism & Marketing Division’s mission statement:

TOURISM & MARKETING MISSION STATEMENT

We build the positive public image of North Dakota as a dynamic place to live and work. By showcasing opportunities and inspiring visitors to Be Legendary, we strengthen the economy and provide opportunity for people across our communities.

- **79.09%** of respondents believe the mission statement is aligned with North Dakota’s needs.
- **69.93%** of respondents felt the division was achieving this mission.

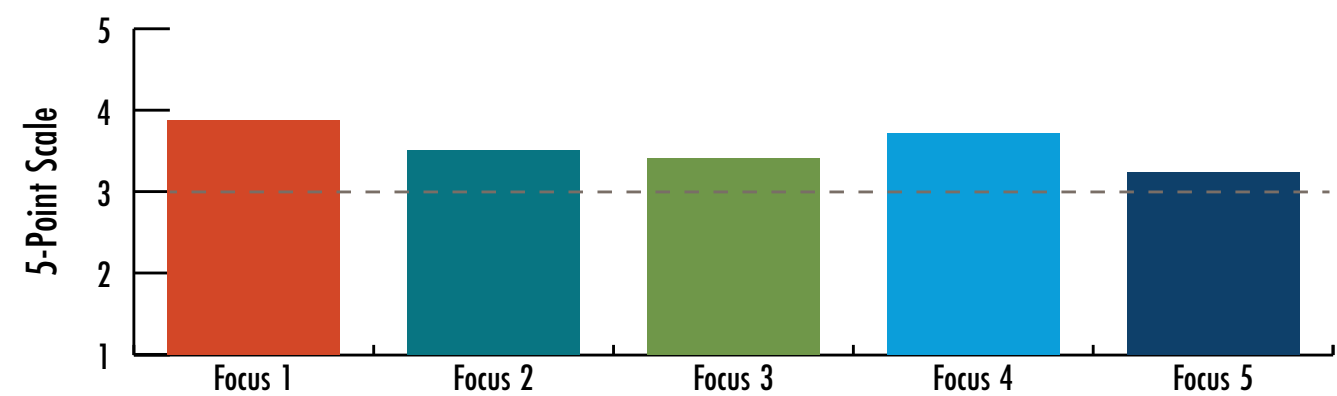
FIVE STRATEGIC AREAS OF FOCUS



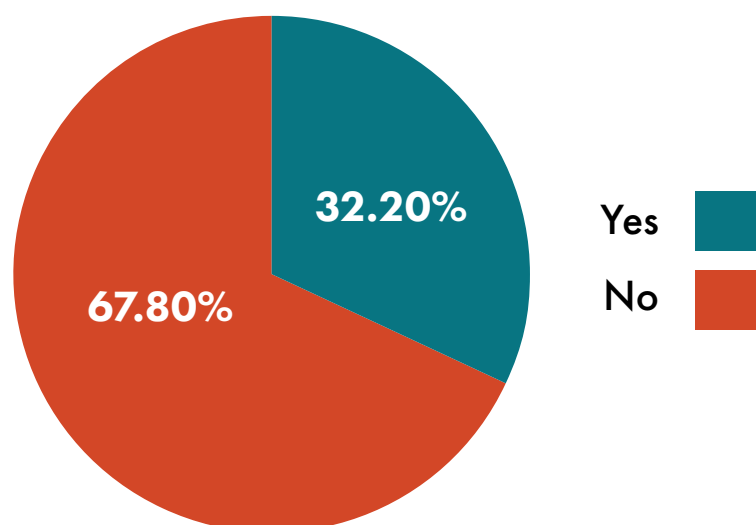
When asked about the Tourism & Marketing Division’s five strategic areas of focus, respondents prioritized:

1. Marketing, including advertising, image development, brand building and storytelling (**3.8**).
2. Tourism development and business activity (**3.45**).
3. Elevate community building and economic diversification efforts and support a unified state brand (**2.83**).
4. Provide exceptional personal service to visitors and partners (**2.71**).
5. Drive industry support and advocacy (**2.2**).

On a five-point scale, the Tourism & Marketing Division’s performance was ranked higher than mid-point for all areas of focus. The strongest rating (**3.87**) was in marketing, and the lowest ranked (**3.23**) was in elevating community building, economic diversification and supporting a unified state brand.



Respondents were asked if there is another priority area that should be a strategic area of focus:



Should there be another strategic area of focus?

Respondents also made recommendations on additional areas of focus to consider. Most comments fell into the following themes:

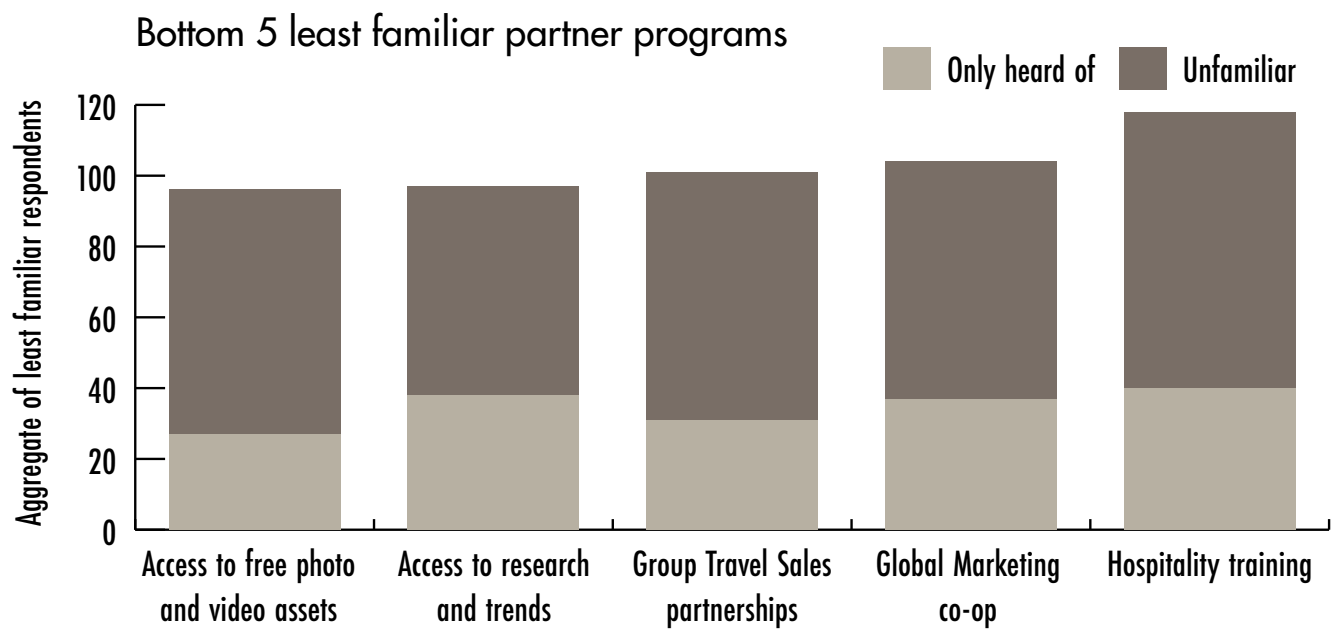
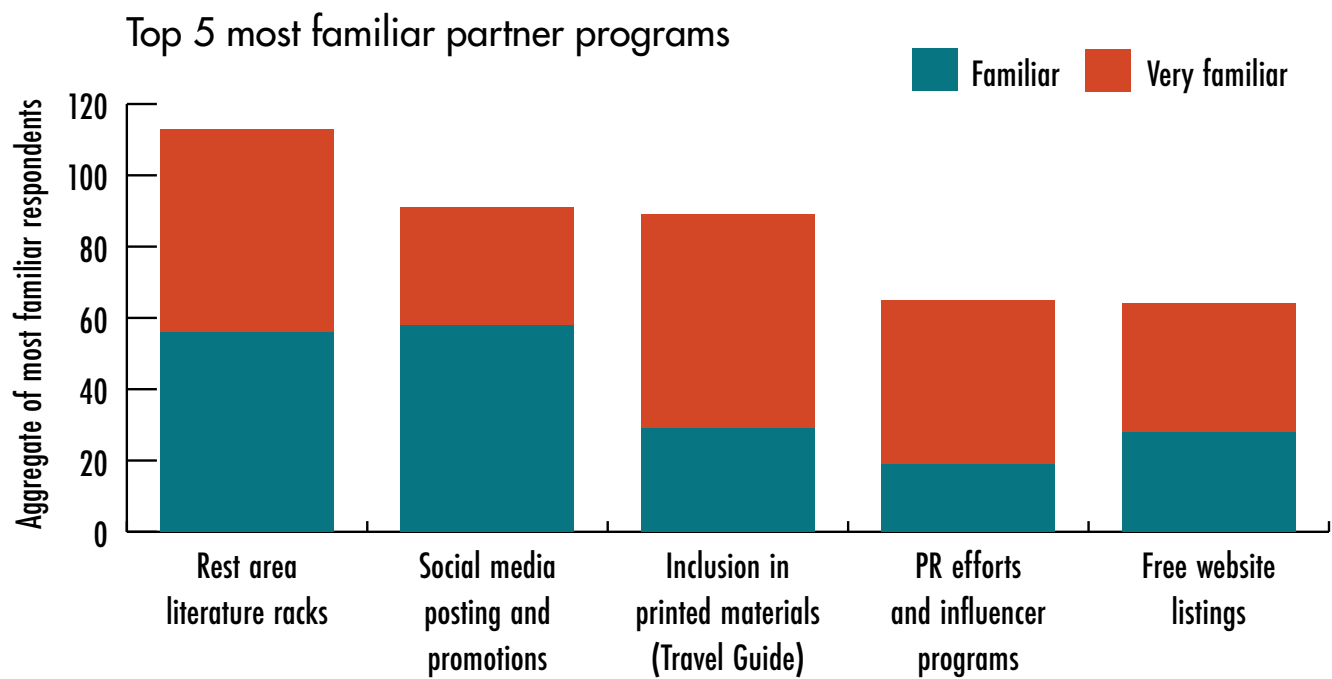
1. Destination/community development
 - a. Support small towns, rural, small attractions
 - b. Arts
 - c. Amenities and itineraries to extend length of stays
 - d. Event grants
2. Focused marketing efforts
 - a. More marketing – larger budget
 - b. Target suggestions contradicted each other (east vs west, instate vs out, neighbors vs coasts)
 - c. Lifestyle – live here
3. Industry engagement
 - a. Help small businesses
 - b. Tourism-hospitality training (career opportunities)
 - c. Marketing training
4. Focus niches
 - a. Tribal tourism
 - b. Outdoor recreation (Lake Sakakawea, etc.)
 - c. Agriculture

PARTNER PROGRAMS

North Dakota Tourism & Marketing has a vast number of partner programs. Sixteen options were provided to gauge how familiar the industry is with these partner programs. More than half were ranked above the mid-point in familiarity, however, most programs were ranked right around mid-point, indicating only moderate awareness.

- The partner program with the greatest familiarity is the Rest Area Literature Rack Program.
- The partner program with the lowest familiarity is hospitality training.

The graphs below represent the top five and bottom five categories out of the 16 total categories provided, showing an aggregate of the most familiar and the least familiar options.

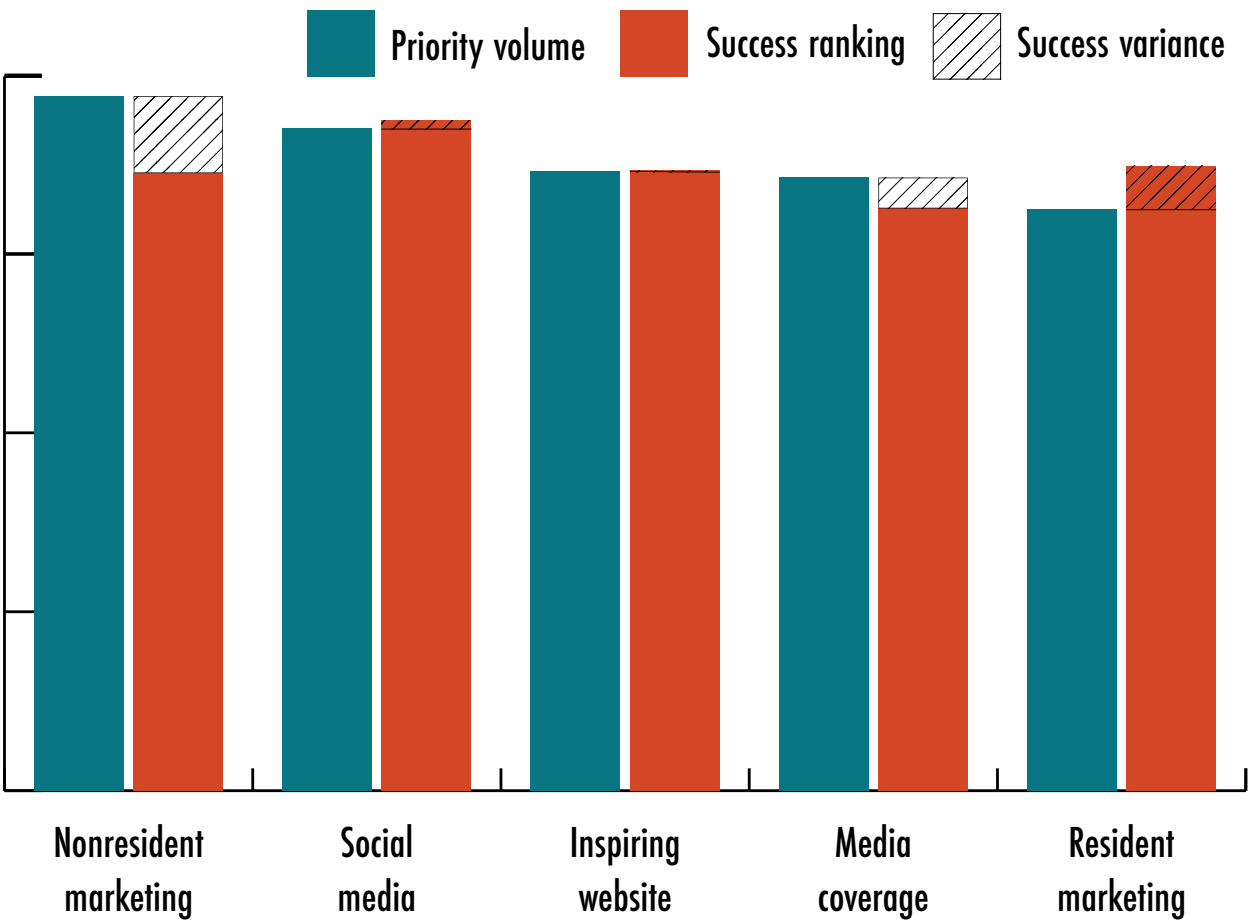


DESTINATION MARKETING PRIORITIES & EFFECTIVENESS

Destination marketing is the principal role of the Tourism & Marketing Division. Stakeholders were asked to weigh the importance of several marketing efforts, and then to rank the effectiveness of the Tourism & Marketing Division in those efforts.

- The most important marketing role, as identified by stakeholders was: Provide inspiring destination marketing to encourage nonresident visitation (8.76). Stakeholders indicated additional efforts are needed to meet the value of importance (7.98), creating a variance between importance and effectiveness.
- Nine of the 13 marketing areas were evaluated by stakeholders to outperform their importance. Ranked as most effective was: Showcase North Dakota offerings through social media (8.49).
- Of lowest importance to stakeholders was: Provide relevant and believable research and metrics on the value of tourism to the North Dakota economy (5.60).

Stakeholder priorities in comparison with how we’ve succeeded



COMMUNICATION & RESEARCH

Stakeholders prioritized the following communication methods from the Tourism & Marketing Division.

1. Direct email or calls with staff
2. Tourism industry section of the website
3. In-person meetings
4. Tourism industry newsletter
5. Travel Industry Conference and stakeholder meetings
6. Travel Industry Chat presentations/calls

Visitation research and trends are used to drive marketing strategies and tactics. All research is reported to the public, and destination marketing partners are able to use reports and dashboards. Current research needs, as prioritized by respondents were:

1. Visitor profile studies
2. Image and awareness studies
3. Advertising effectiveness and return on investment research

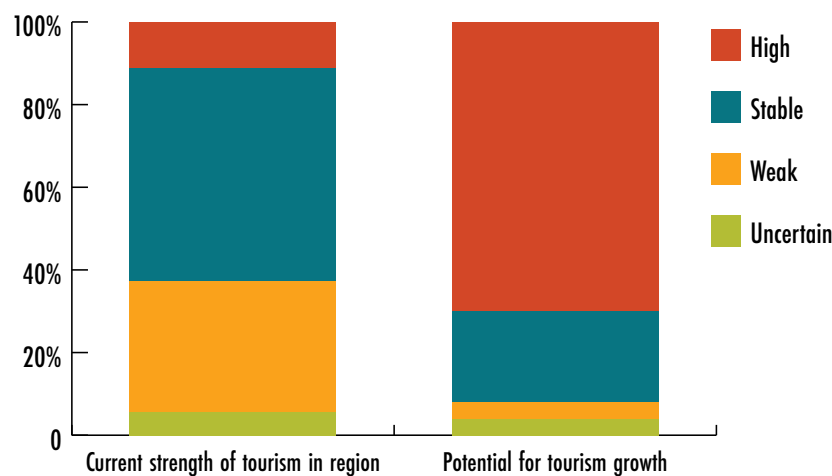
TOURISM BUSINESS DEVELOPMENT

In order to expand options for visitors, amenities for residents, and revenue for the state, the Tourism & Marketing Division supports business development. Development tools prioritized in the survey results were:

1. Grants to support new or expanded offerings (**3.55**)
2. Grants to support tourism development planning (**3.45**)
3. Community seminars and trainings on opportunities and value (**2.98**)

Respondents were asked to rank the current strength of tourism in their region:

- **51.41%** of respondents ranked their current strength of tourism in their region as stable.
- **70.06%** said their regional potential for tourism growth was strong.



Development priorities primarily fell into three areas:

Providers:

- Attractions
- Entertainment
- Better accommodations (hotels, full-service cabins)
- Events (arts, culture, sports)
- Evolving for a younger audience and sustainability
- Heritage/ethnic
- Private business development, amenities and access to capital
- Meeting spaces
- Recreation: golf, trails, parks, activities, adventure
- Local flavor: retain businesses, main street options, small towns, rural experiences
- Oil and gas tours

Outdoor recreation:

- Agritourism
- Nature/ecotourism
- Hunting/fishing
- Adventure: off-highway vehicles, horseback, archeology, hiking, camping
- Trails and green space access

Organization:

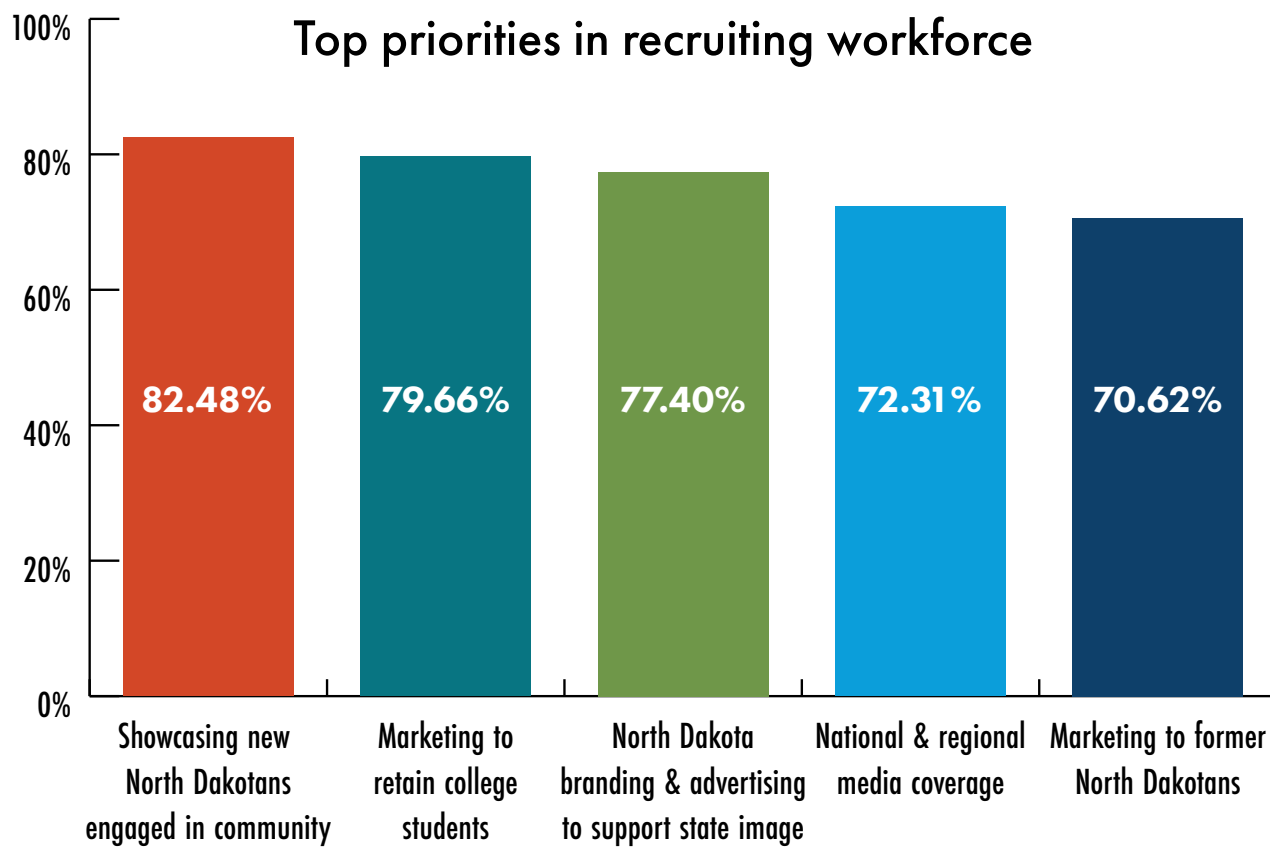
- Training
- Tribal tourism
- In-state pride/education
- Political support
- Community buy-in
- Planning help
- Cooperation/packaging
- More financial support and grants to DMOs

CHALLENGES

Stakeholders were asked to share the greatest challenges facing tourism growth in their region. Similar themes emerged, along with the business development suggestions. These themes include:

1. Workforce
2. Funding
3. COVID-19 impact – loss of business and staff
4. Need for champions and local leaders
5. Lack of awareness
6. Geography
7. Access to lakes, land and rivers (recreation)
8. Funding for marketing and lack of grants
9. State support for business development falls short of other states
10. Access to recreation areas
11. Public sentiment that seems anti-immigrant or anti-outsider
12. Missing a focal point attraction for the region

With workforce being a prevalent issue locally, regionally, state- and nationwide, survey respondents rated how important several factors were in helping to attract and retain workers. The top priorities were identified as:



OPPORTUNITIES & CONSIDERATIONS

Survey respondents suggested 482 priorities for the future of tourism in North Dakota. Common themes arose in those suggestions. North Dakota Tourism & Marketing will use the results of this survey supplemented by formal research and personal meetings and work with stakeholders to develop future strategies. Areas of consideration include:

Opportunities:

- There were two destination marketing priorities that respondents evaluated as needing additional focus: nonresident marketing and media coverage. Additional resources and advocacy are needed for North Dakota to compete in the crowded and competitive advertising and media relations markets.
- North Dakota citizens are very interested in tourism and marketing the state as shown by the high percentage of respondents who are not directly involved in current tourism operations.
- There is significant interest from the South Central region in the state.
- A number of suggestions made by stakeholders represent initiatives already taking place at North Dakota Tourism & Marketing.

Considerations:

- Nearly 68% do not believe there should be additional strategic areas of focus.
- There is a gap between the importance ranking of focus areas and the performance of the division. Identify ways to bridge this gap.
- Given the low familiarity of partner programs and initiatives, look for ways to increase communication, partner outreach and participation.
- Grants to support tourism development were prioritized in survey responses and open-ended comments. Funding would be needed to support this request.



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If you have any questions regarding this summary
or require additional detail, please email us at
MarketingND@nd.gov.