



North Dakota National Awareness and Perception Study

September 28, 2022

NORTH
Dakota
Be Legendary.™



Agenda

- Background and Methodology
- National Talent Trends
- Perceptions of North Dakota
- Key Findings and Recommendations
- Q & A



Background and Methodology

Background and Methodology



Consumer Perception Study Overview

To establish baseline metrics and perceptions of North Dakota among working age individuals.



Methodology

An online survey developed in cooperation with the North Dakota Department of Commerce. Surveys were distributed via email to individuals over 21 years of age with at least a high school diploma who do not currently live in North Dakota. Quotas ensured sample was balanced to represent the U.S.



Respondents

1,002 working age individuals

- 300 from the South
- 252 from the West
- 243 from the Northeast
- 207 from the Midwest (not including North Dakota)

National Trends

National Talent Trends

- DCI's *Talent Wars* research shows an emerging trend in the talent attraction landscape: talent is **prioritizing an improved quality of life**, now more than ever.
- **Moving closer to family** is a top-trigger inspiring relocation (emphasizing the importance of a boomerang strategy).
- This year's study revealed the top three ways talent forms impressions of an area include **internet research, first-hand experience and word of mouth**.
- Talent **largely relocates in the same region** as their original residence...but not always.
- Promote **regional and statewide assets** to appeal to the widest audience.

Top Triggers Inspiring Relocation

A person in a red shirt and black pants is rappelling down a large, textured rock face. The background shows a clear blue sky and a rocky landscape with some greenery at the bottom.

46%

For a better
quality of life

A family consisting of an older woman, a younger woman, and a young child are sitting together on a couch, looking at a tablet. They are all smiling and appear to be enjoying the time together. A bookshelf is visible in the background.

31%

To be closer
to family

A person wearing a white shirt, blue shorts, and a red backpack is walking barefoot on a sandy beach. The ocean is visible in the background under a clear sky.

27%

Wanting a
different
lifestyle

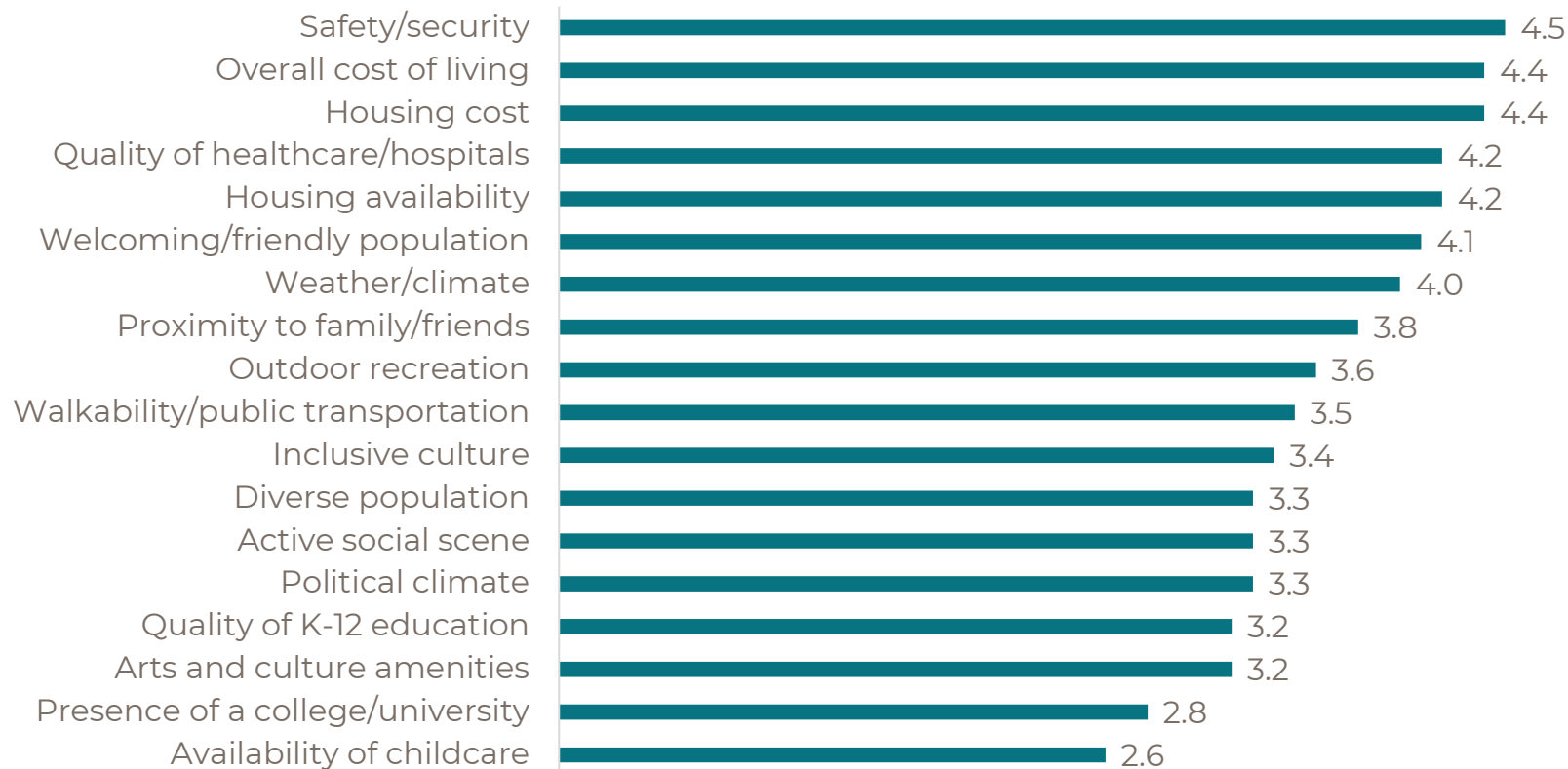
*what does
the quality of life
mean to talent?*

Attractions/amenities
Diverse and inclusive
Neighborhood/community
Culinary options
Climate/weather
Public Transportation
Arts/culture
Open space
Peaceful Shopping
Good K-12 schools
Walkability
Nightlife
Healthcare
Safe
Sense of community
Cost of living
No congestion/traffic
Outdoor recreation

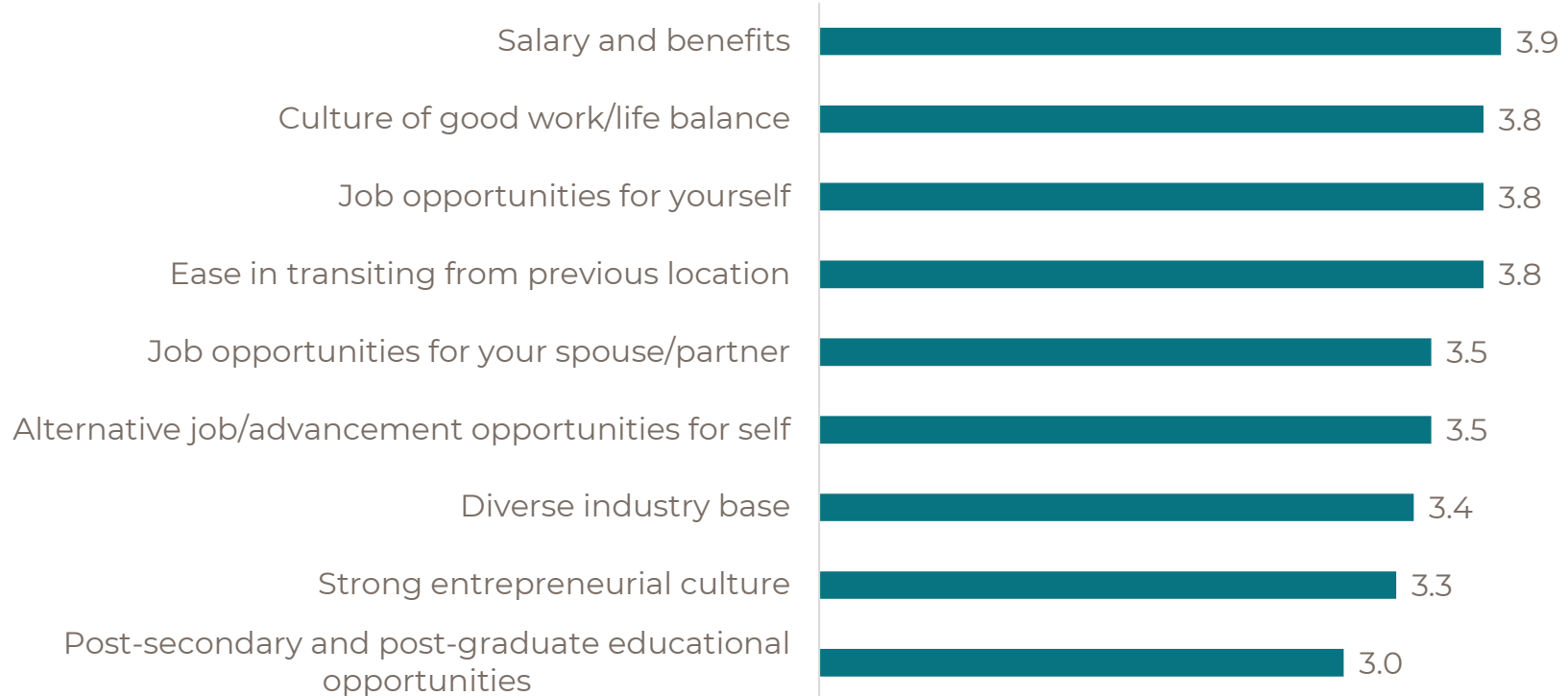
Where Talent Wants to Live...

Current Community Type	Prior Community Type			
	Large Urban Area	Mid-sized urban area	Rural	Suburban
Large urban area (more than 1 million in population)	48%	32%	15%	14%
Mid-sized urban	24%	36%	15%	10%
Rural	9%	14%	49%	13%
Suburban	19%	18%	21%	64%

Importance of Lifestyle-Related Factors*

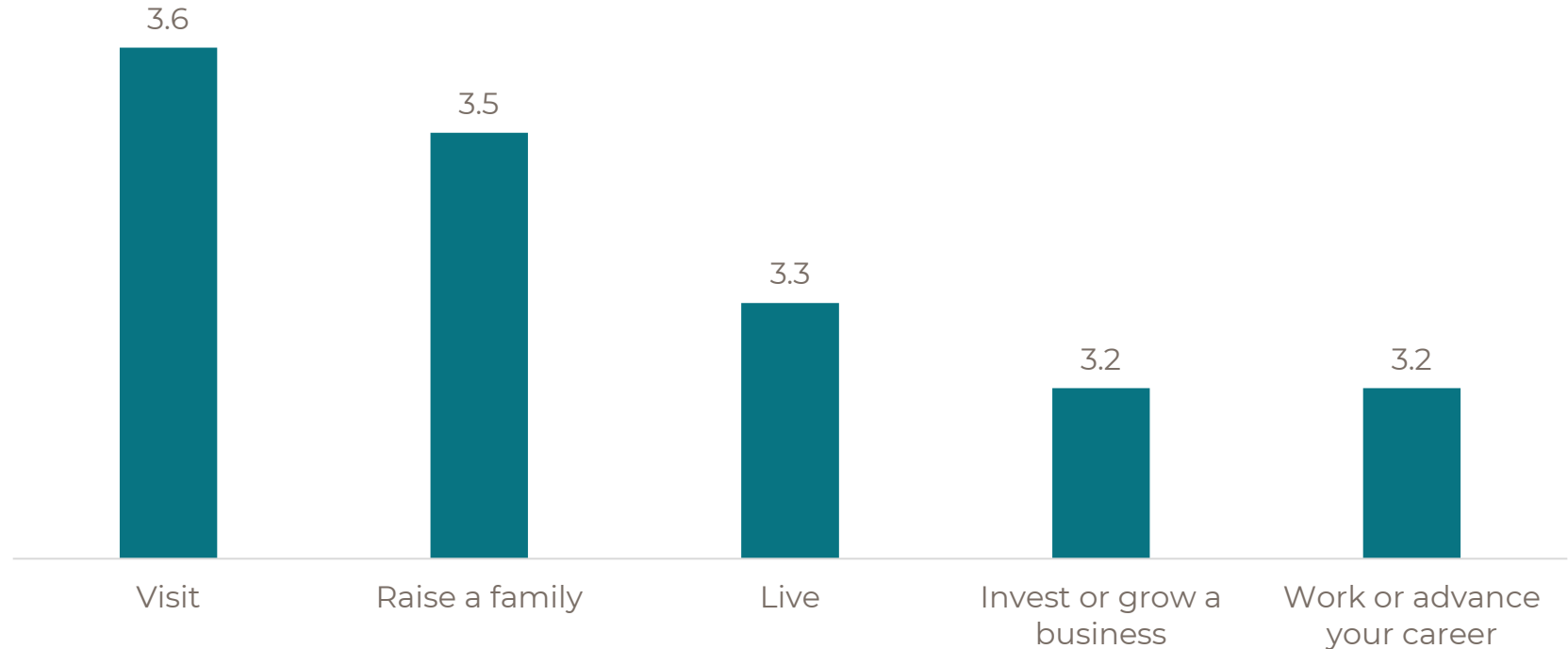


Importance of Career-Related Factors*



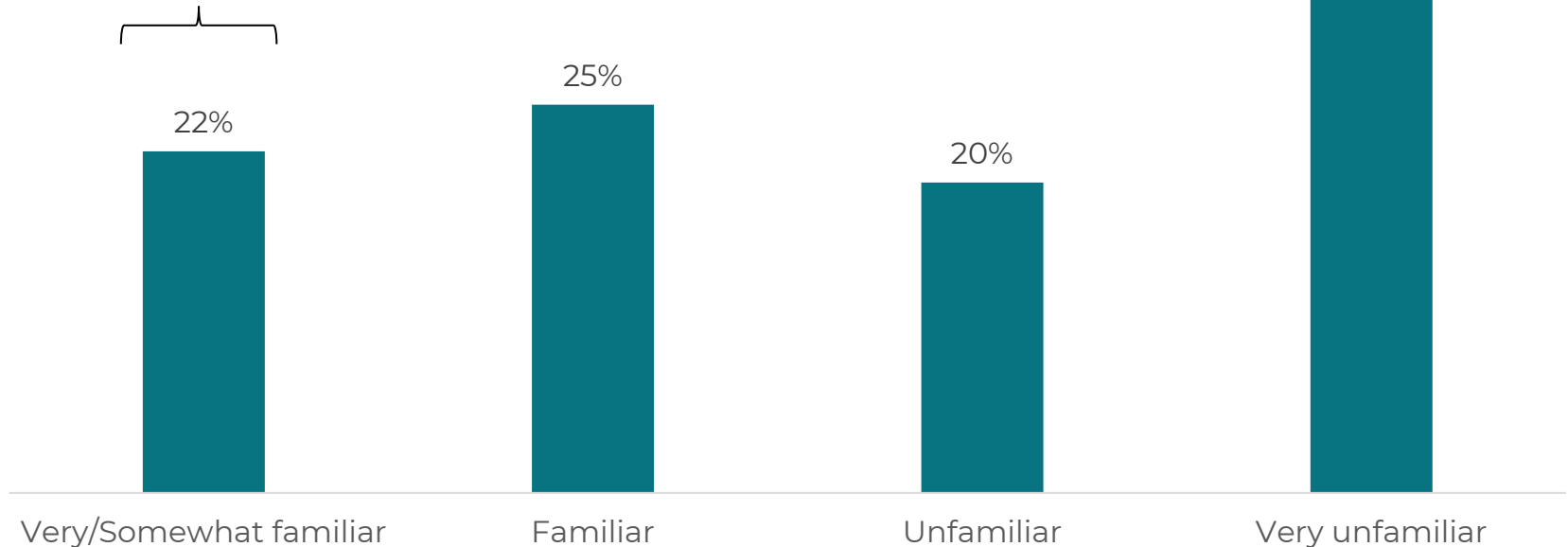
Perceptions of North Dakota

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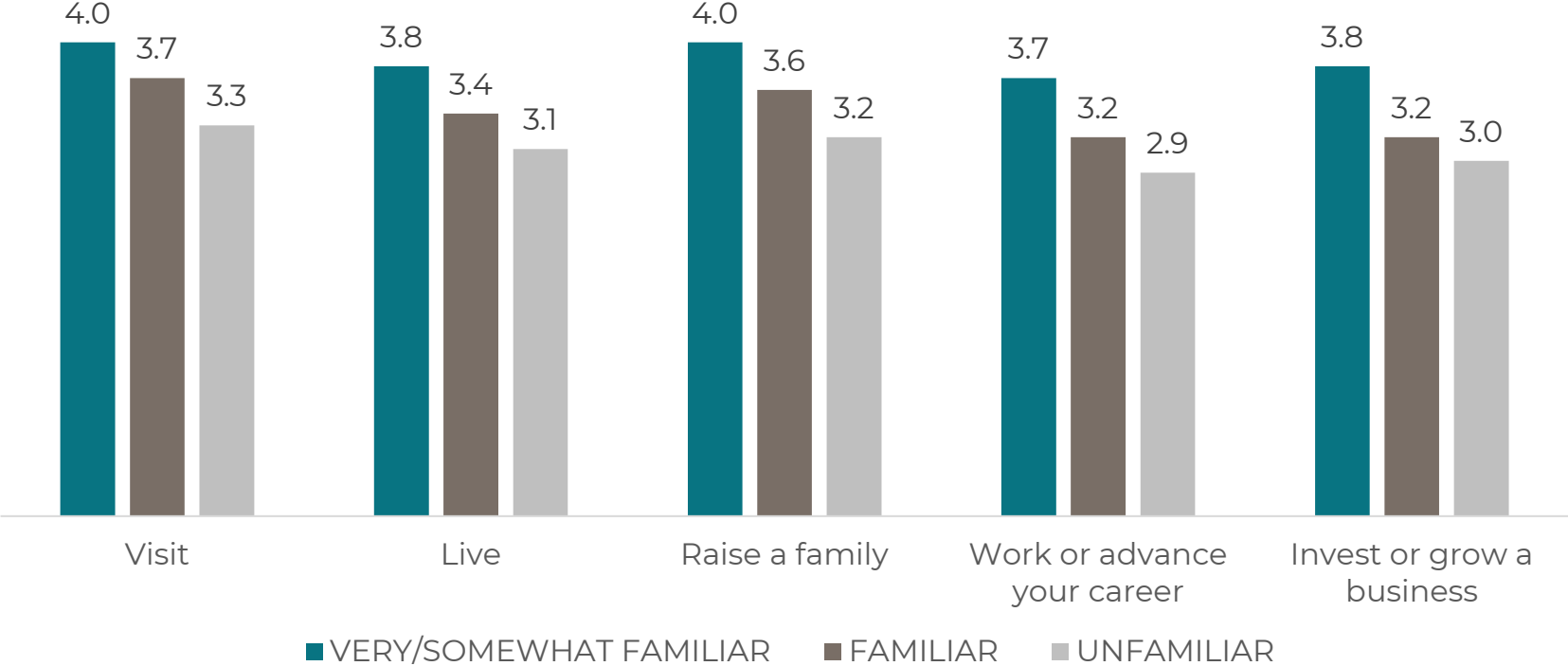


Level of Familiarity with North Dakota

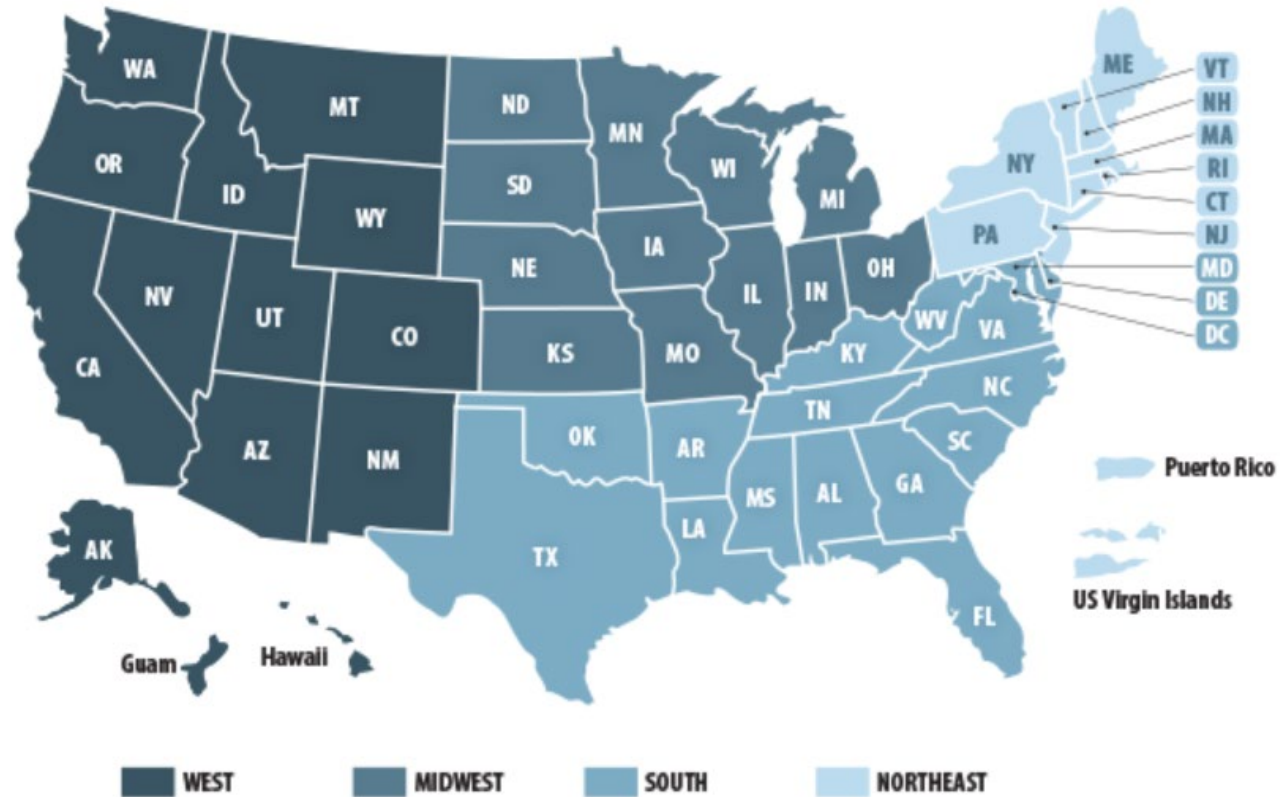
...have lived in or visited ND



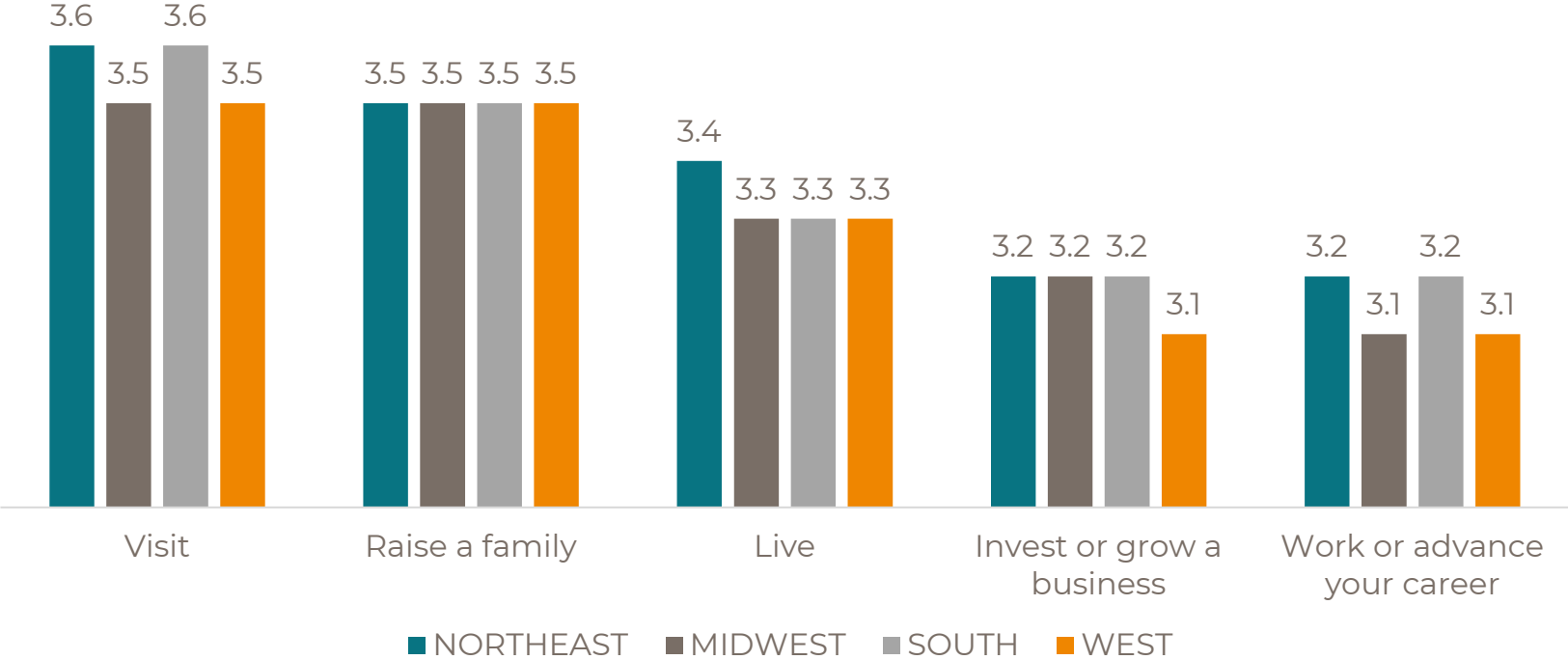
Perceptions of North Dakota, by Familiarity



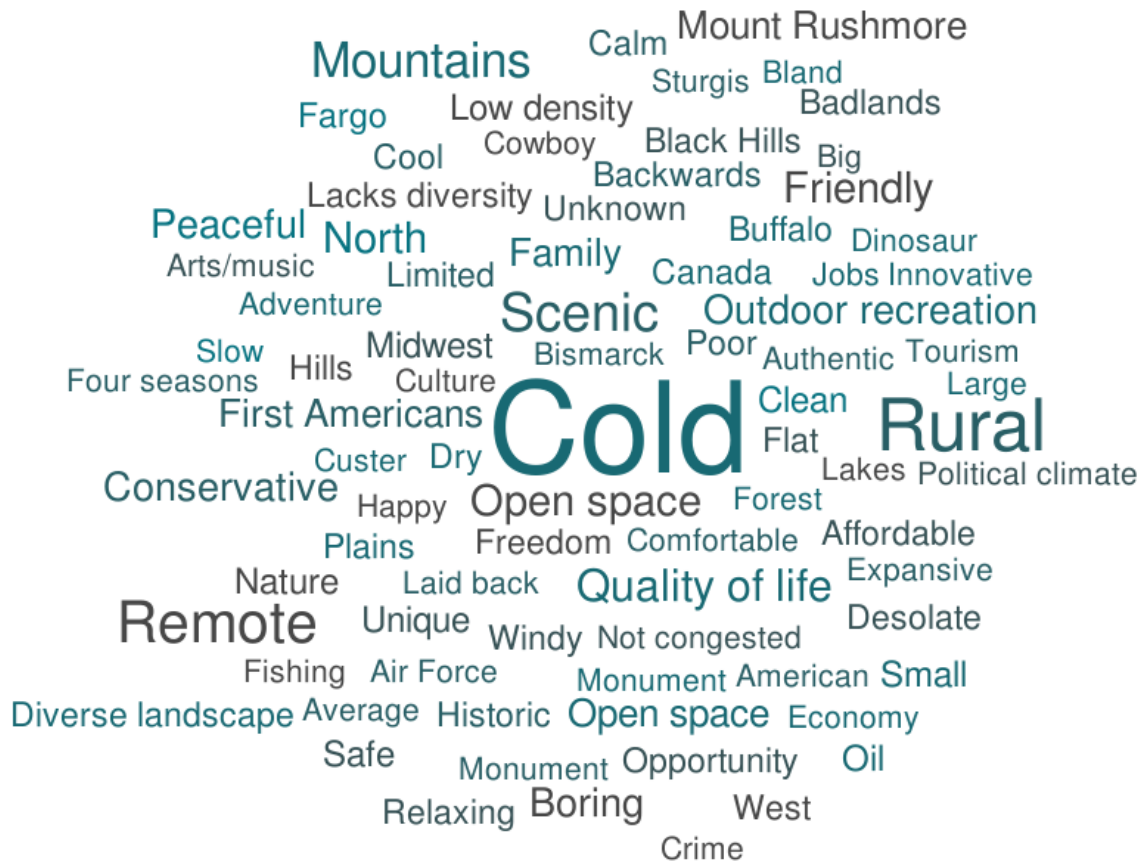
Regions of the U.S.



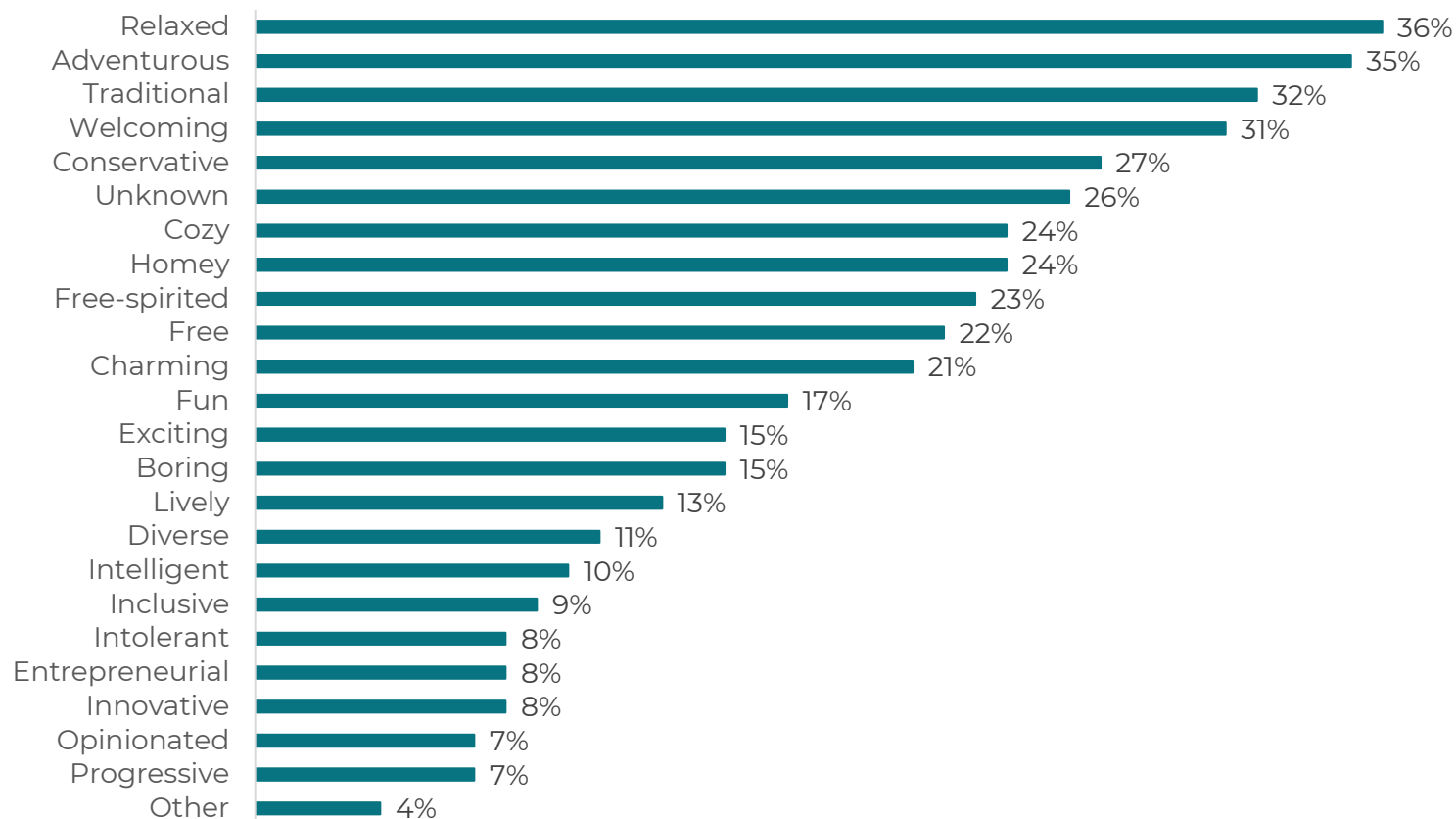
Perceptions of North Dakota by Region



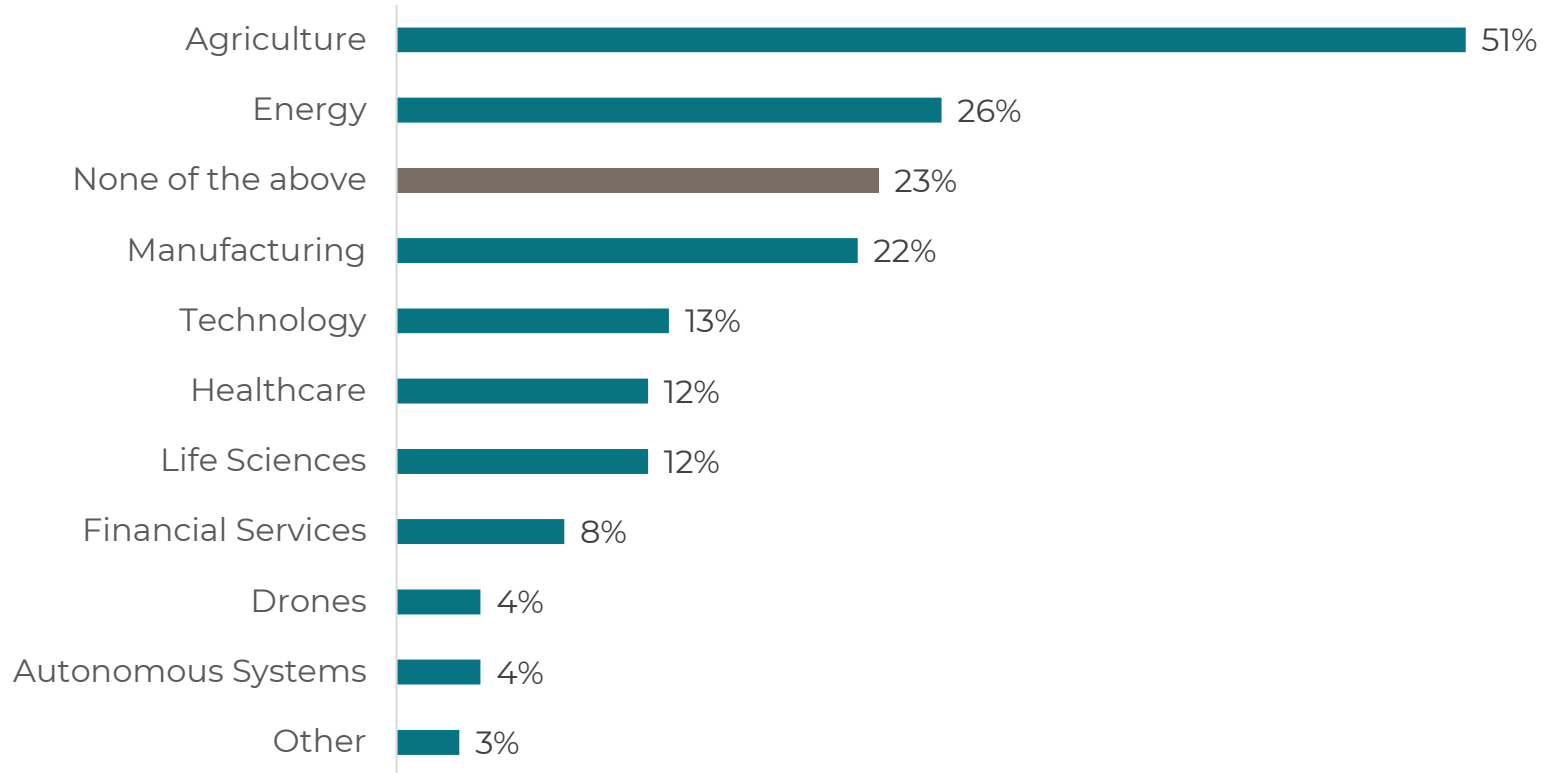
Top Associations with North Dakota



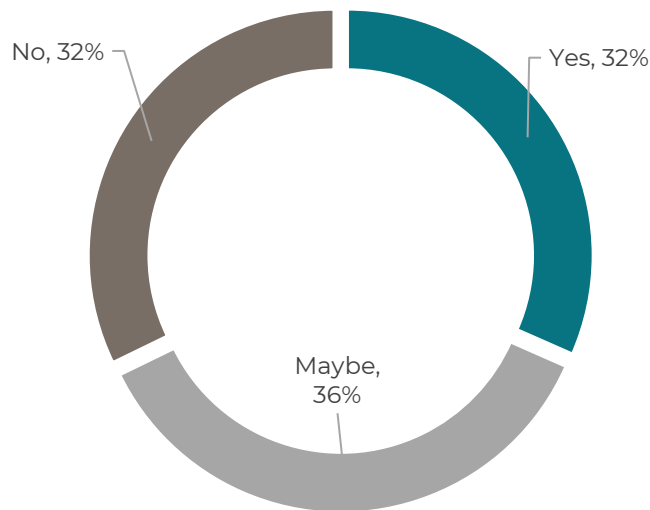
The “Feel” of North Dakota



Industries Associated with North Dakota



Interest in Relocating to North Dakota



24% of respondents report they would not be willing to relocate to North Dakota because of the climate.

Other top reasons preventing relocation:

- Too far from family/friends
- Unknown

Q. If a job opportunity that matched your skill and salary requirements were offered to you in North Dakota, would you be willing to relocate?

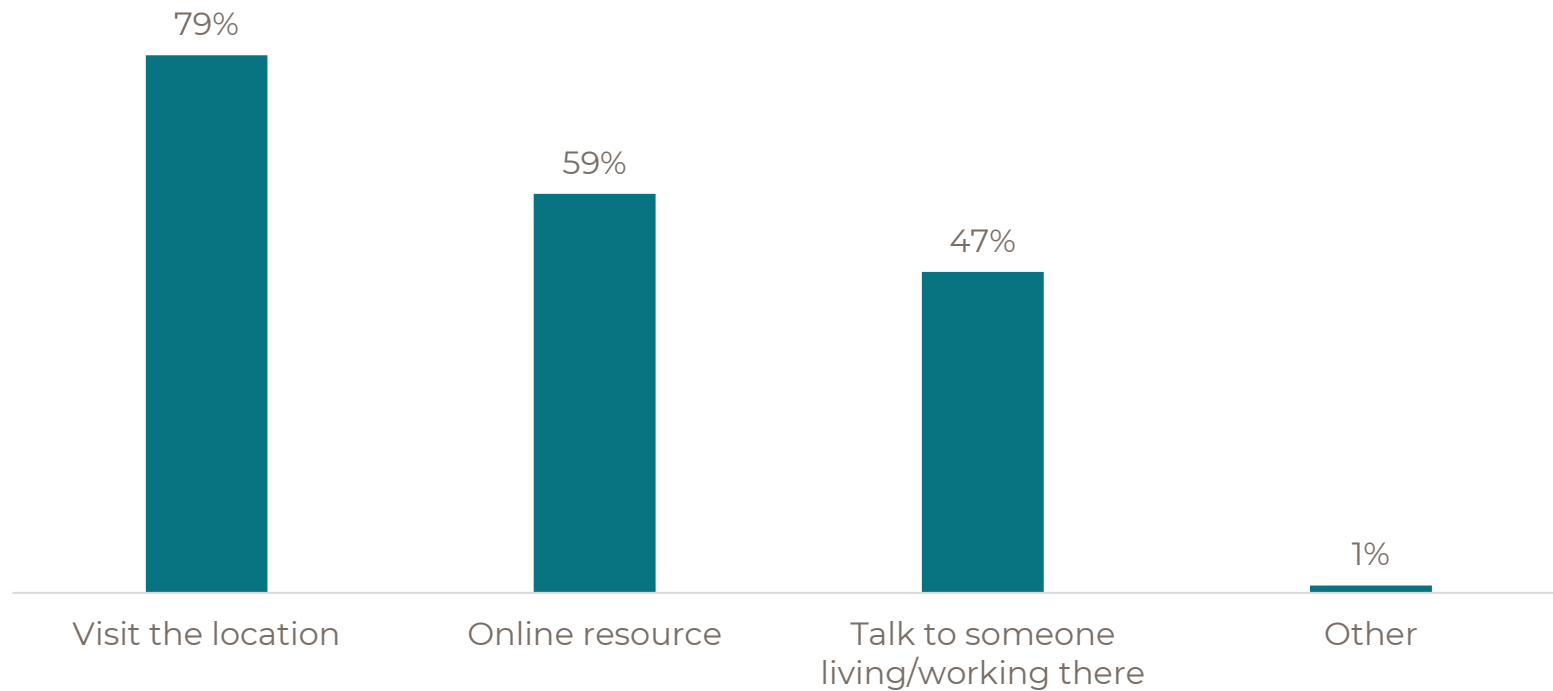
Profile of Talent Interested in Relocating to North Dakota

71%

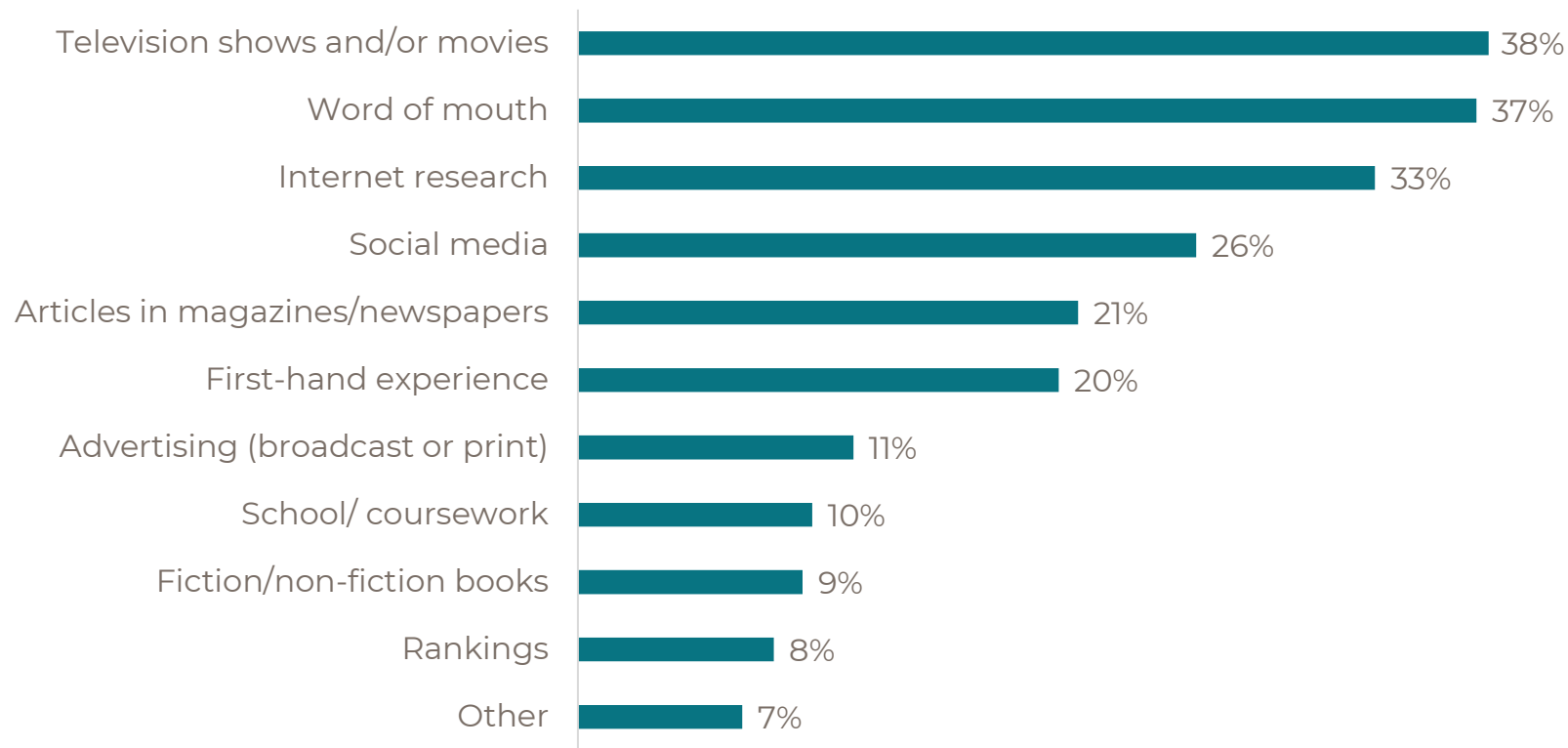
...are familiar with
North Dakota.

- **79%** are employed full or part time
- **55%** live with a spouse/partner or a spouse/partner and children
- **50%** are between the ages of 30 and 49
- **36%** have a Bachelor's degree or higher

Most Useful Tools When Considering Relocation



How Impressions of North Dakota were Informed



Social Media Channels to Expand Your Influence

*Employment
Opportunities*

facebook

59%

LinkedIn

41%

YouTube

36%

Relocation

facebook

57%

YouTube

45%

Instagram

41%

Travel

facebook

56%

YouTube

51%

Instagram

45%

Key Findings

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1. Perceptions of the state are moderate but largely driven by a lack of familiarity.
2. The depth/breadth of industry sectors and career opportunities in North Dakota are largely unknown among talent. The state is perceived more favorably as a place to visit and live.
3. Talent is reprioritizing the importance of lifestyle-related factors and North Dakota is well-positioned to capitalize on its quality of life.
4. First-hand experience is critical in influencing perceptions of an area and North Dakota has a significant opportunity to appeal to visitors in-destination who are there to experience the state's outdoor recreation, historical and cultural assets. While in-destination, messaging on lifestyle and career-related assets is encouraged to reach this target audience.
5. Messaging should be tailored to platforms most utilized by talent but does not have to be customized by region.

Key Findings

6. The talent most interested in relocating to the state are more “settled” and established in their career and family-life.
7. Messaging and marketing needs to leverage perceived strengths and counteract misperceptions.
 - Embrace the cold. Consider messaging as a “climate haven”
 - Arming employers with information to sell state/regions to prospective employees will be important.
 - Affordability particularly relative to salaries (don’t market as a “cheap” location but rather “value-driven”.
 - Depth/breadth of industry sectors and job opportunities
 - Housing cost/availability; safety/security; attractions and amenities
 - Diversity of living environments regionally (i.e., rural, suburban, downtown)
8. Key messages should be internally as well as externally communicated.

Thank You!
