

23 FOR 2023



23 RECENT RESEARCH DATA POINTS AND TRENDS ...

Sara Otte Coleman

TOURISM-MARKETING TEAM



Sara Otte Coleman
Director
Oversees state marketing, strategic direction and performance, including workforce recruitment, to support Commerce's mission. Tourism Division administration, vision and goals including talent and business attraction. Serves on Commerce Senior Leadership Team, primary liaison for Tourism policy.
socoleman@nd.gov • 701-328-2527



Penny Blotsky
Marketing Coordinator
pjblotsky@nd.gov
701-328-7265

Executes project management, assists with marketing strategies and campaign development, analyzes marketing efforts and supports statewide logo and Commerce website needs.



Deanne Cunningham
Visitor Sales and Services Manager
decunningham@nd.gov
701-328-2502

Manages visitor support functions including inquiry response, tourism partner engagement and product development. Direct sales for group travel.



Kayla Jo Finley
Communications Specialist
kjfinley@nd.gov
701-516-3560

Commerce communication plans, news releases, talking points, newsletters, writing for publications, and related writing and editing.



Mike Jensen
Outdoor Promotions Manager
mjensen@nd.gov
701-328-2509

Outdoor media relations, media tours, consumer travel shows, niche marketing, outdoor recreation product development and policy tracking. Film inquiries and partner brochure distribution program.



Alicia Jolliffe
Social Media Strategist
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701-328-2548

Develops social media strategies and implements across all Commerce channels. Supports state social users.



Heather LeMoine
Marketing & Research Manager
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701-328-5372

U.S. and Canada marketing, promotional publications, advertising, e-marketing, tourism research, cooperative programs and contact for North Dakota Travel Industry Conference.



Tricia Miller
Digital Systems Manager
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701-328-5328

Website manager: nd.gov, NDtourism.com and Commerce sites, database management, CRM, data system and software management and support.



Amy Schmidt
Digital Content Specialist
amrschmidt@nd.gov
701-328-5315

Develops, coordinates and executes content on NDtourism.com. Manages partner portal submissions. Develops industry newsletter content.



Kim Schmidt
Communications Manager
ksschmidt@nd.gov
701-328-2532

Public relations program, media liaison, content strategy and implementation. Hosts media tours, national pitches, supports state communication platforms.



Cassie Theurer
Digital Asset Specialist
catheurer@nd.gov
701-328-5387

Photo and video asset management and liaison for state DAM system. Coordinates Governor's Photo Contest, photo needs, location scouting and editing.



Fred Walker
Global Marketing Manager
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701-328-3502

International marketing and sales, travel trade and media, product development tours, culture, heritage and tribal tourism development.



VACANT
Graphic Design Specialist

Design and production work supporting state marketing and branding, publications, promotional efforts, website visuals and display materials.

MEET HOLLY MILLER MANAGER OF TOURISM DEVELOPMENT

Goals – to implement strategic tourism development plan, including active recruitment of new tourism offerings.

Tourism marketing creates demand
Tourism development builds supply

- Budget ask for both





TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

The North Dakota Traveler Economy - 2021 Results

September 2022

Prepared for: North Dakota Tourism Division





Looking back

1. TSA – 21.71 million visitors in 2021, \$2.61 billion spent
F&B – 29%, retail - 22%, transportation - 20%, lodging - 15%, recreation - 14%
State and Local taxes generated \$248 million, Total economic impact - \$4.2 billion
2. 1/3 of counties have met or exceeded 2019 spending levels
3. USTA - US and ND August spending down 3.3% over 2019

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Longwoods
INTERNATIONAL

**North Dakota
2021
Advertising ROI
Research**

Advertising Effectiveness of 2021 Campaign

4. Campaign produced 1.4 million additional trips to ND and \$241.9 million yielding \$23.5 million in state and local taxes for a tax ROI of 1:3
5. ROI \$1 invested = \$34 in spending
6. Additionally, 31% intend to visit ND in next 12 months



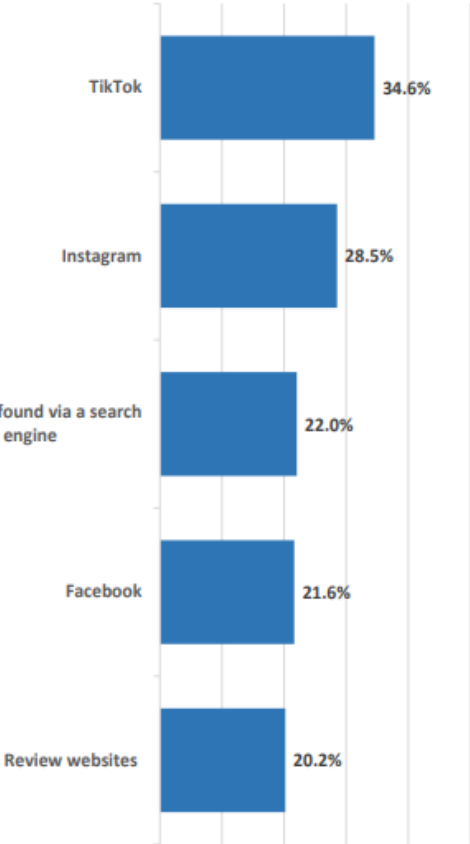


7. Awareness in regional advertising markets

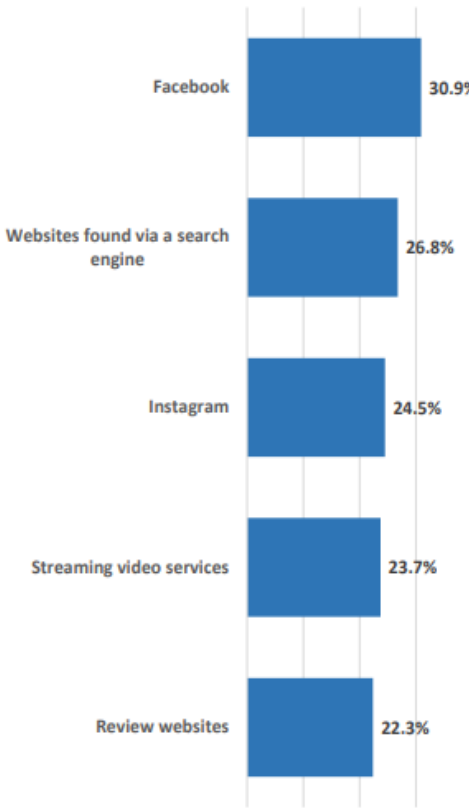
- 56% of travelers in regional markets recalled seeing at least one ad
- ND – 65%, MB and SK - 58%, WI - 58%, IL - 57%, SD - 43%
- Digital ads - 51%, sponsorships - 35%, broadcast radio - 32%, print - 30%, broadcast TV - 24%, OOH - 22%, social - 21%

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit?

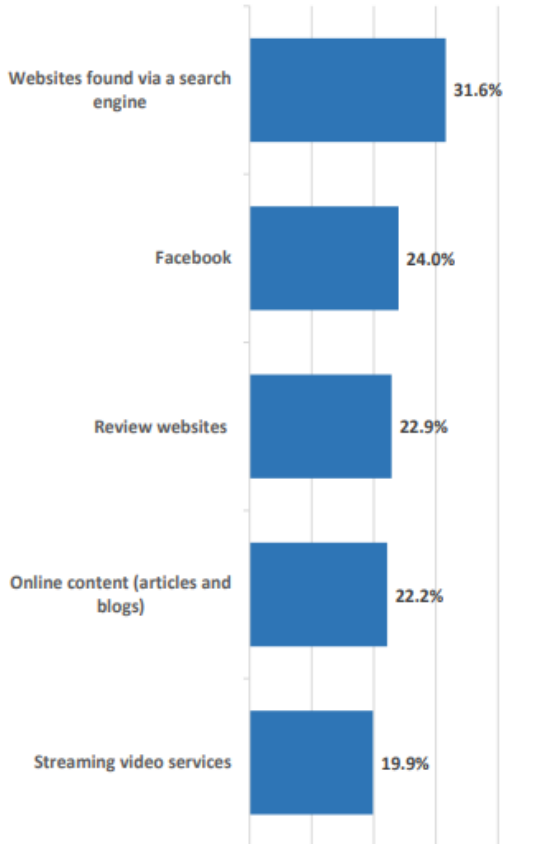
Gen Z



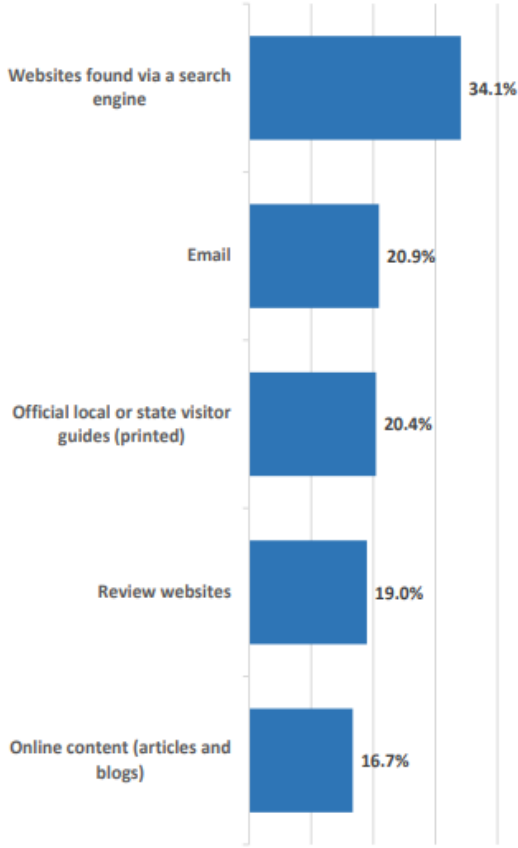
Millennials



Gen X



Boomer or older





North Dakota National Awareness and Perception Study

September 28, 2022

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Top Triggers Inspiring Relocation

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

46%

For a better
quality of life

A woman with curly hair is sitting on a brown couch, holding a tablet. A young child is sitting on her lap, looking at the tablet. An older woman with short grey hair is sitting next to them, smiling and looking at the tablet. They are in a room with bookshelves in the background.

31%

To be closer
to family

A person wearing a white shirt, blue shorts, and a red backpack is standing on a sandy beach. They are looking out at the ocean. The sky is clear and blue.

27%

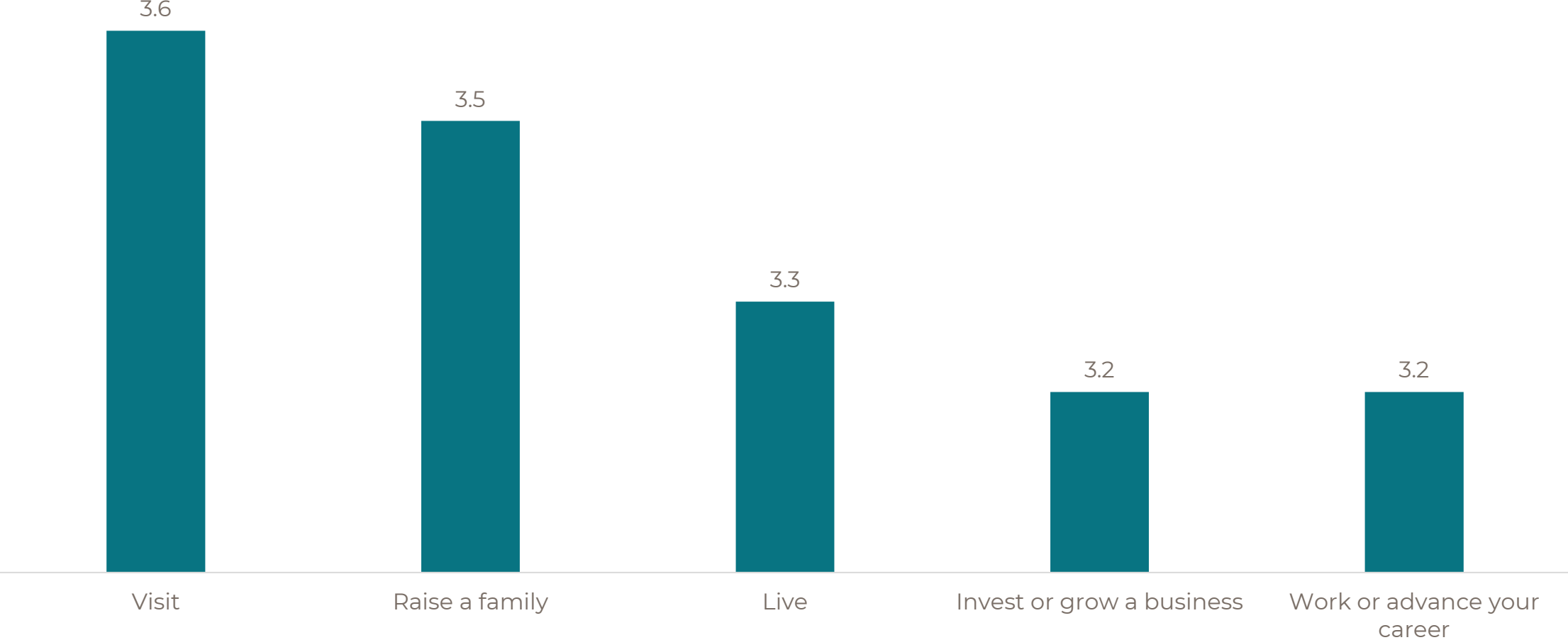
Wanting a
different
lifestyle

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

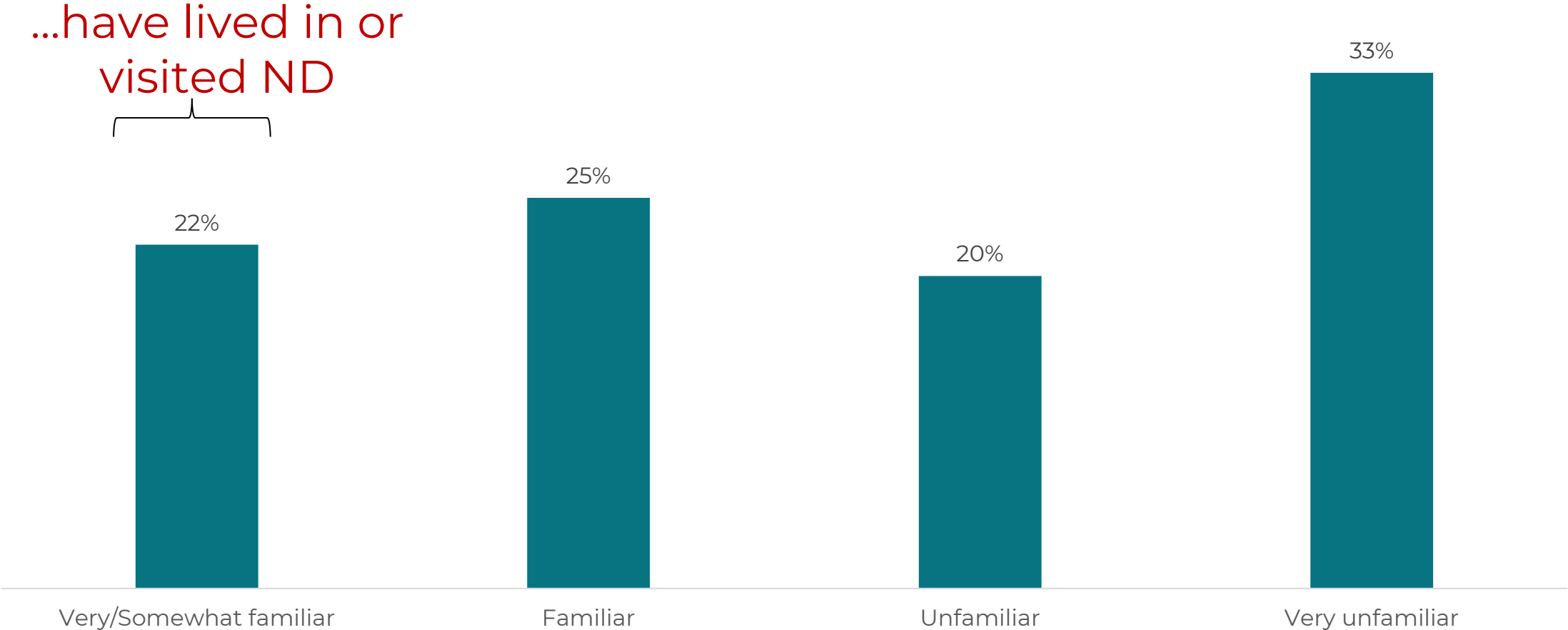
Attractions/amenities
Diverse and inclusive
Neighborhood/community
Culinary options
Climate/weather
Public Transportation
Arts/culture
Open space
Peaceful Shopping
Good K-12 schools
Walkability
Nightlife
Healthcare
Safe
Sense of community
Cost of living
No congestion/traffic
Outdoor recreation

Perceptions of North Dakota

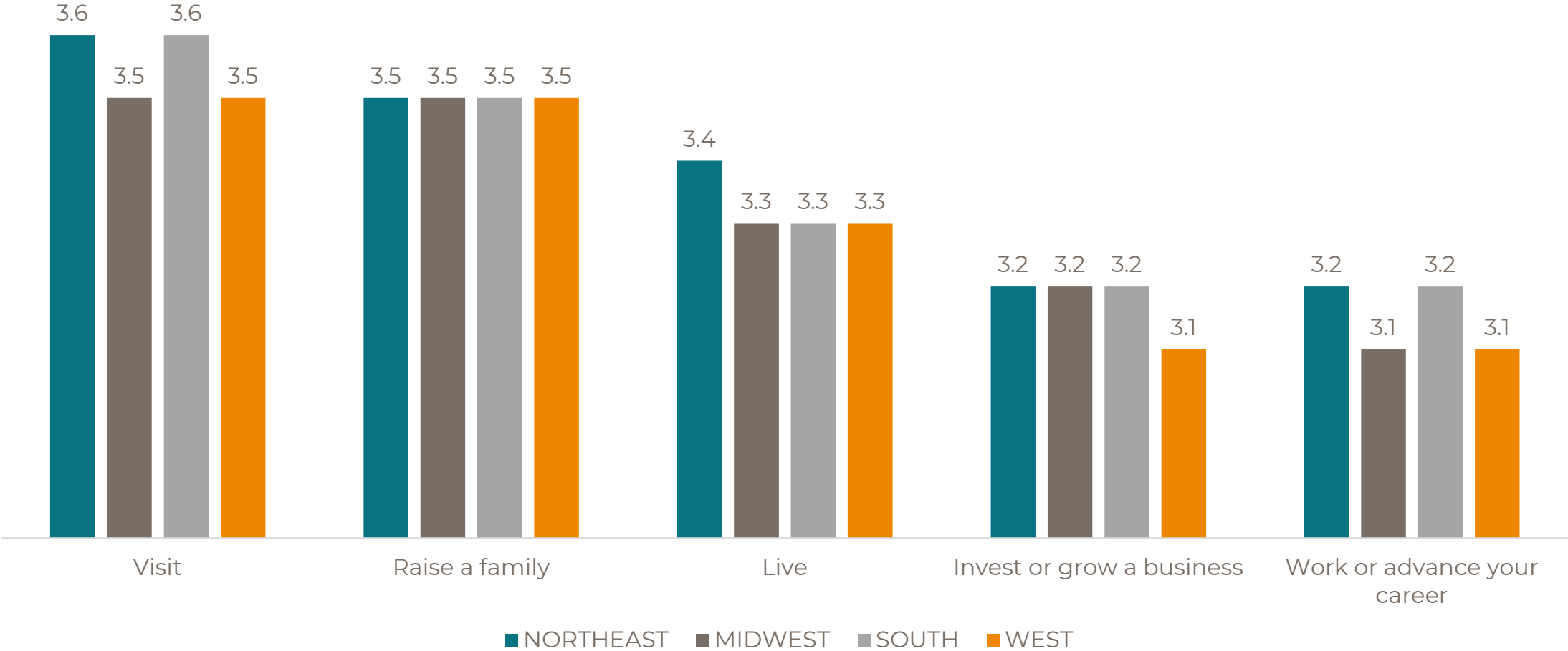
Perceptions of North Dakota



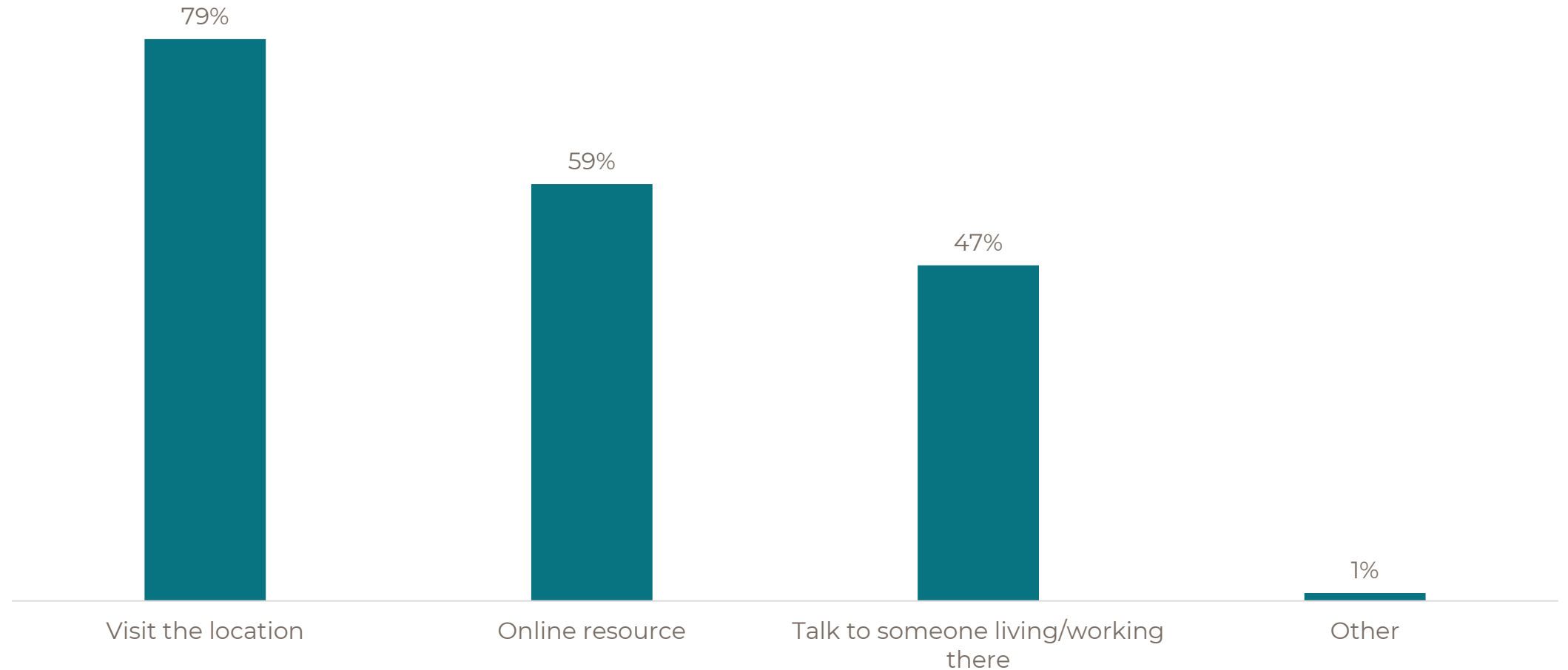
Level of Familiarity with North Dakota



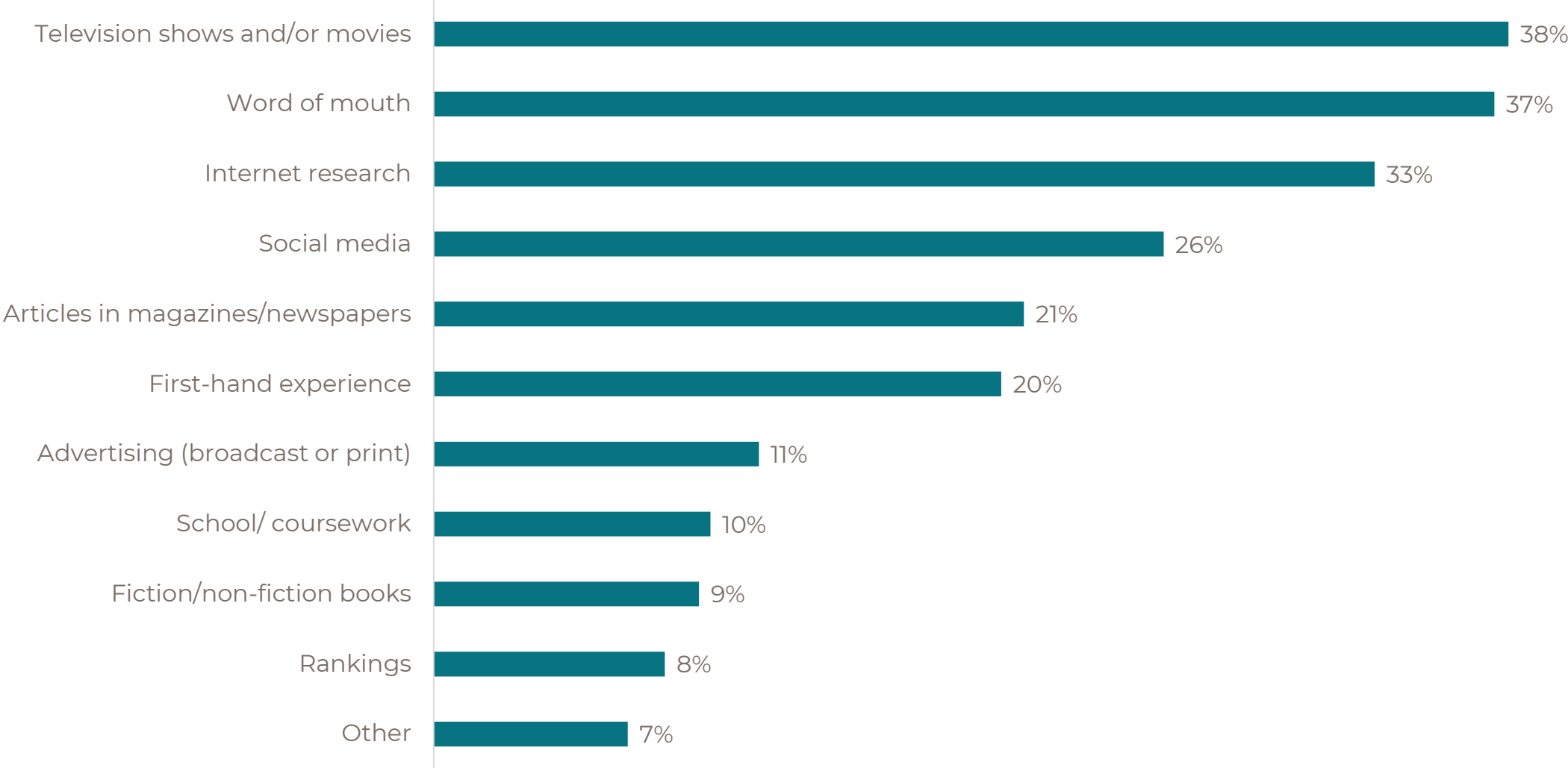
Perceptions of North Dakota by Region



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%

National Awareness Study

8. Very familiar - 22%, familiar - 25%, Unfamiliar - 20%, very unfamiliar - 33%
9. Perception of ND varied little by topic or region. "Feel of ND" – relaxed, adventurous, traditional, welcoming.
10. Visiting the location was viewed as most useful tool – 79%
11. Of those interested in relocating to ND, 71% are familiar with the state
12. TV shows and movies, WOM, internet research, social, print editorial





Travel Sentiment Study Wave 66

OCTOBER 4, 2022

miles
PARTNERSHIP

Longwoods
INTERNATIONAL

THE STATE OF THE AMERICAN TRAVELER

TRAVELER SEGMENTS EDITION

SEPTEMBER 27, 2022

Destination  Analysts 

Outlook

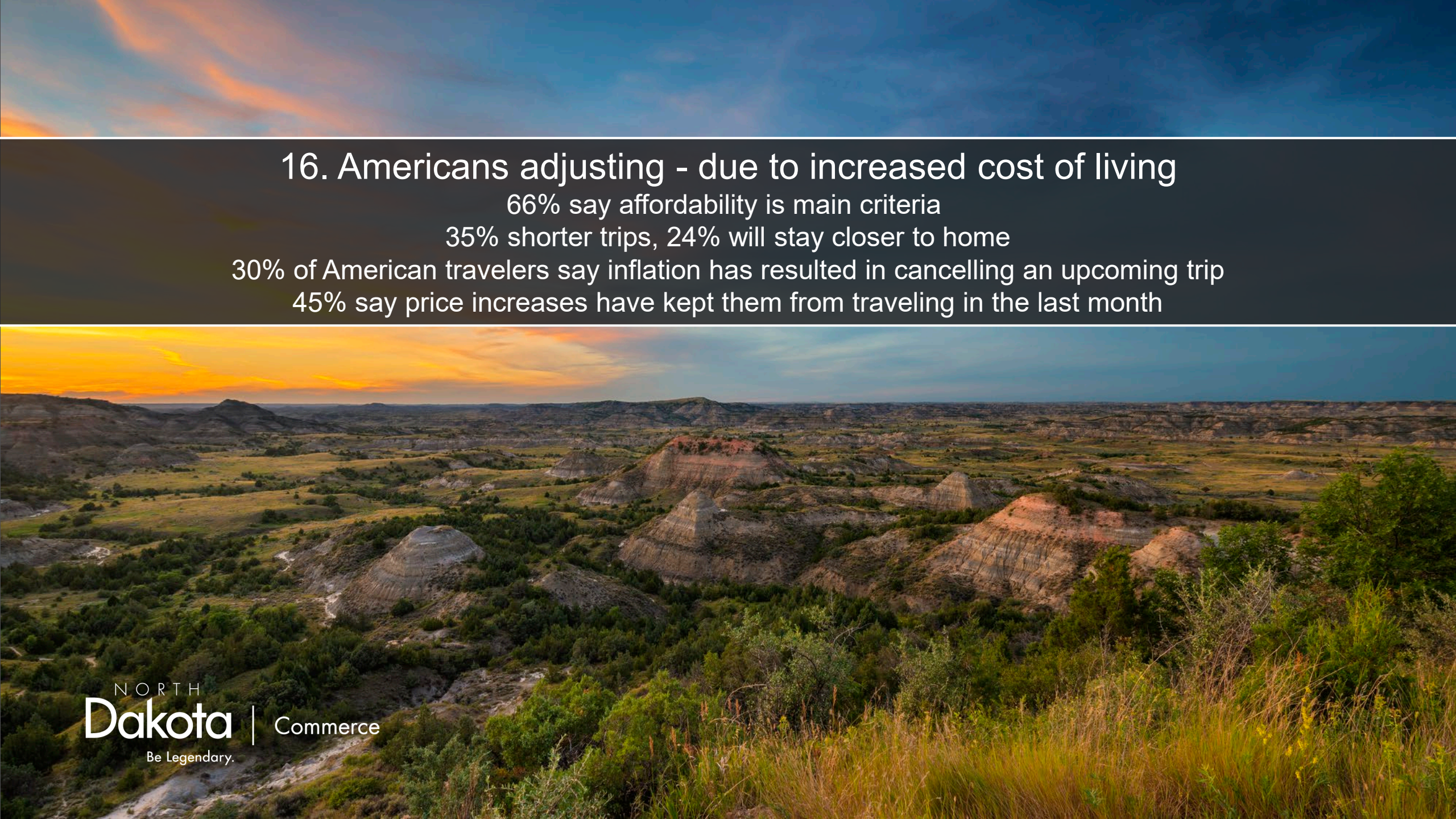
13. Americans will still travel
- 90% will be traveling in the next 6 months, 50% say more than in 2021 (LI)
 - 64.7% of Americans still expect to take at least one overnight trip in next 3 months (DA)
 - 68% are open to inspiration
14. Leisure travel is expected to fully rebound in 2022. Spending time with loved ones is THE top priority
15. Budget travel is priority, especially with Millennials and Gen Z





Financial Anxiety Replaces Covid Concerns

- The top travel deterrents remain firmly financial: the cost of gas, airfare, and travel in general being too expensive, as well as their own personal financial situation.
- Inflation continues to be a significant issue. Over 30% of American travelers say recent inflation in consumer prices has led them to cancel an upcoming trip, and 45% say high prices have kept them from traveling in the past month.
- Over the past year, those who feel their personal financial situation is stronger than it was relative to the year prior has fallen from 41% in August 2021 to 27% in August 2022.



16. Americans adjusting - due to increased cost of living

66% say affordability is main criteria

35% shorter trips, 24% will stay closer to home

30% of American travelers say inflation has resulted in cancelling an upcoming trip

45% say price increases have kept them from traveling in the last month

A couple is walking on a paved path that leads towards a wooden observation tower. The tower is a two-story structure with a small square tower on top, all made of dark wood. The scene is set on a grassy hill with a town visible in the background under a clear sky.

17. Workforce shortage is impacting quality of experience

- 40% of summer travelers reported service issues
- Culinary experiences are higher priority among travelers, especially young travelers

18. Reduced hours and businesses means less interest in traveling to your community and reduced spending

19. Safe, worry-free still high priority

20. Uncrowded

Undiscovered

Local authentic experience

21. Visitors seek sustainable offerings

- 70% of travelers are more likely to book accommodations if they know the property is planet-friendly
- Electric Vehicle charging is essential



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22. Diversity, Equity and Inclusion

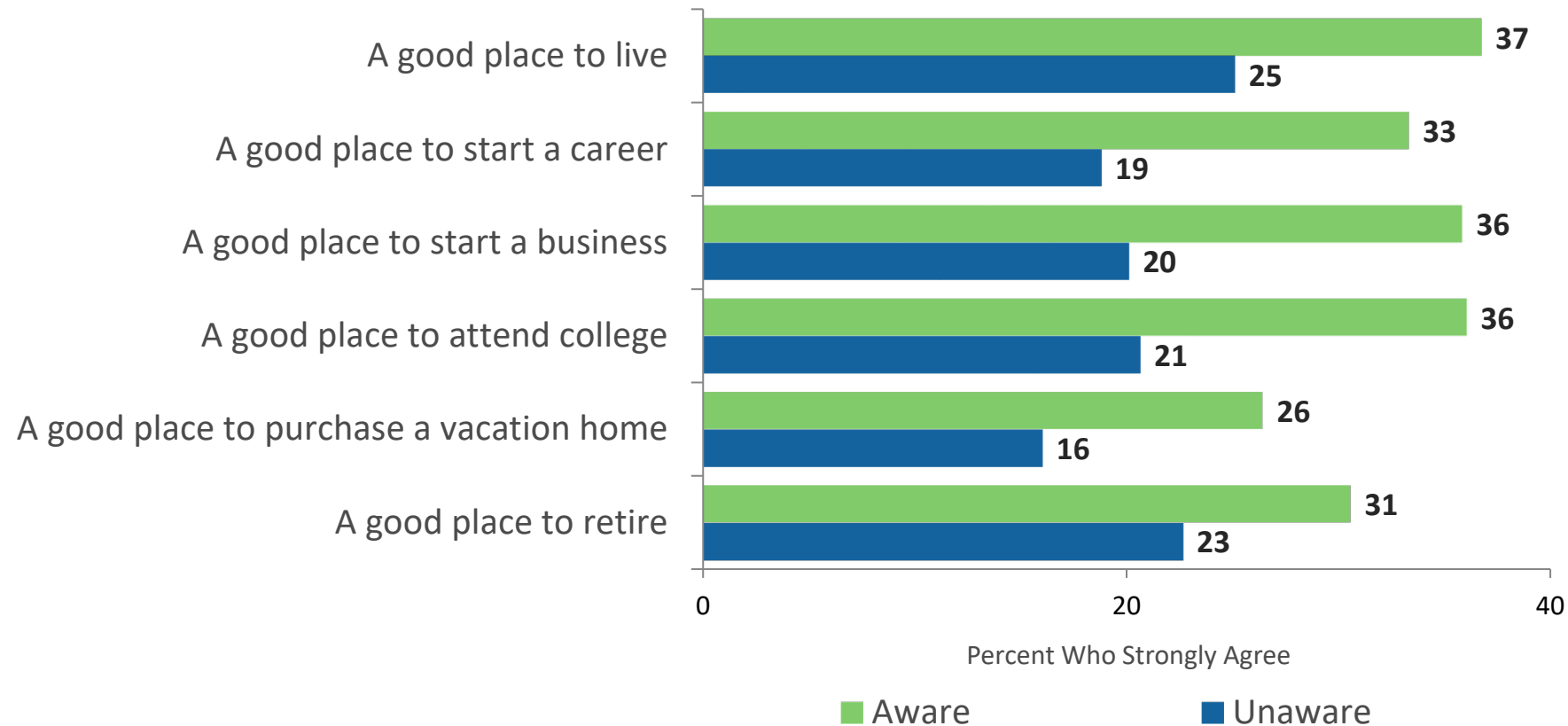
- Gen Z travelers: 45% identify as non-Caucasian, 25% LGBTQIA and 20% travel with varying accessibility
- Intentional about inclusive marketing and programming



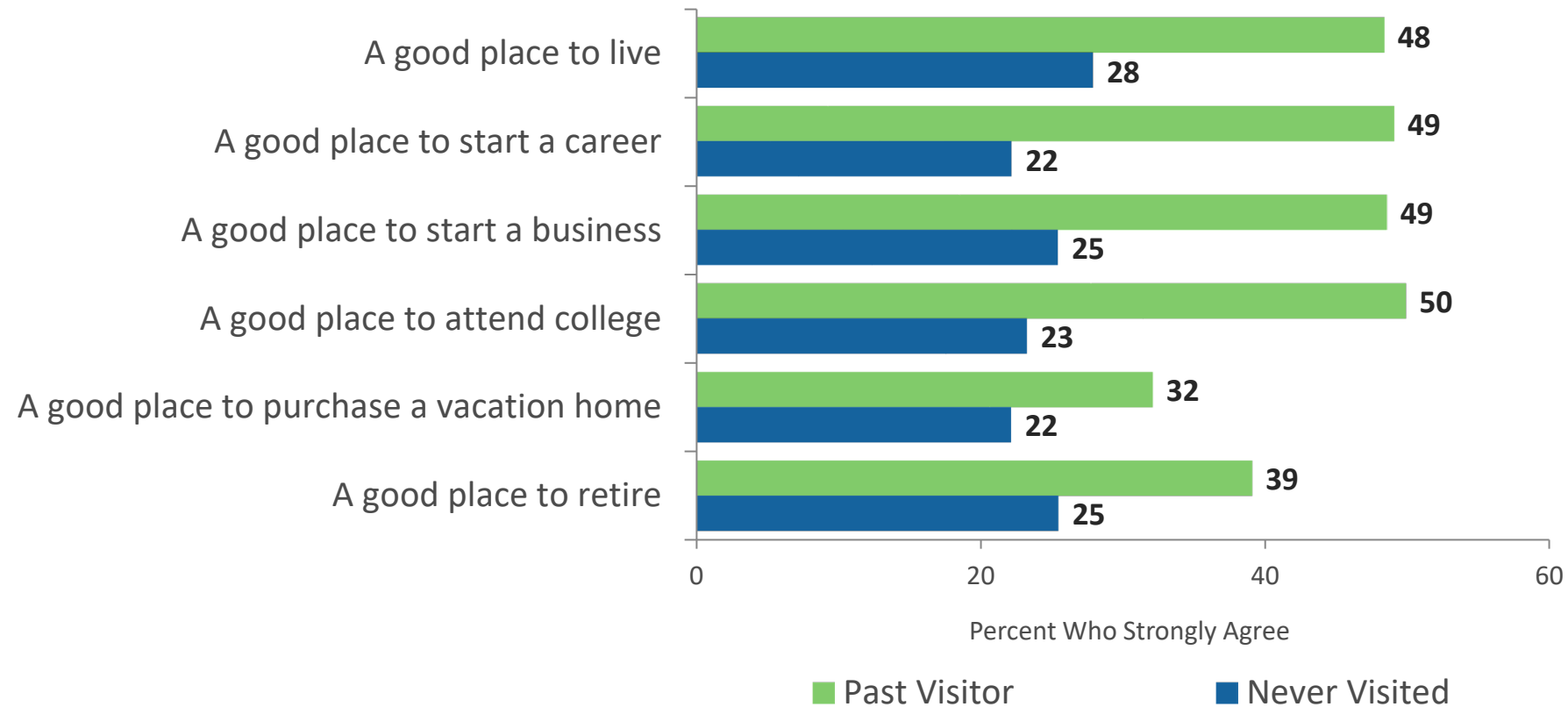
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Outlook and forecasts changing daily
Leisure 2023 may decrease

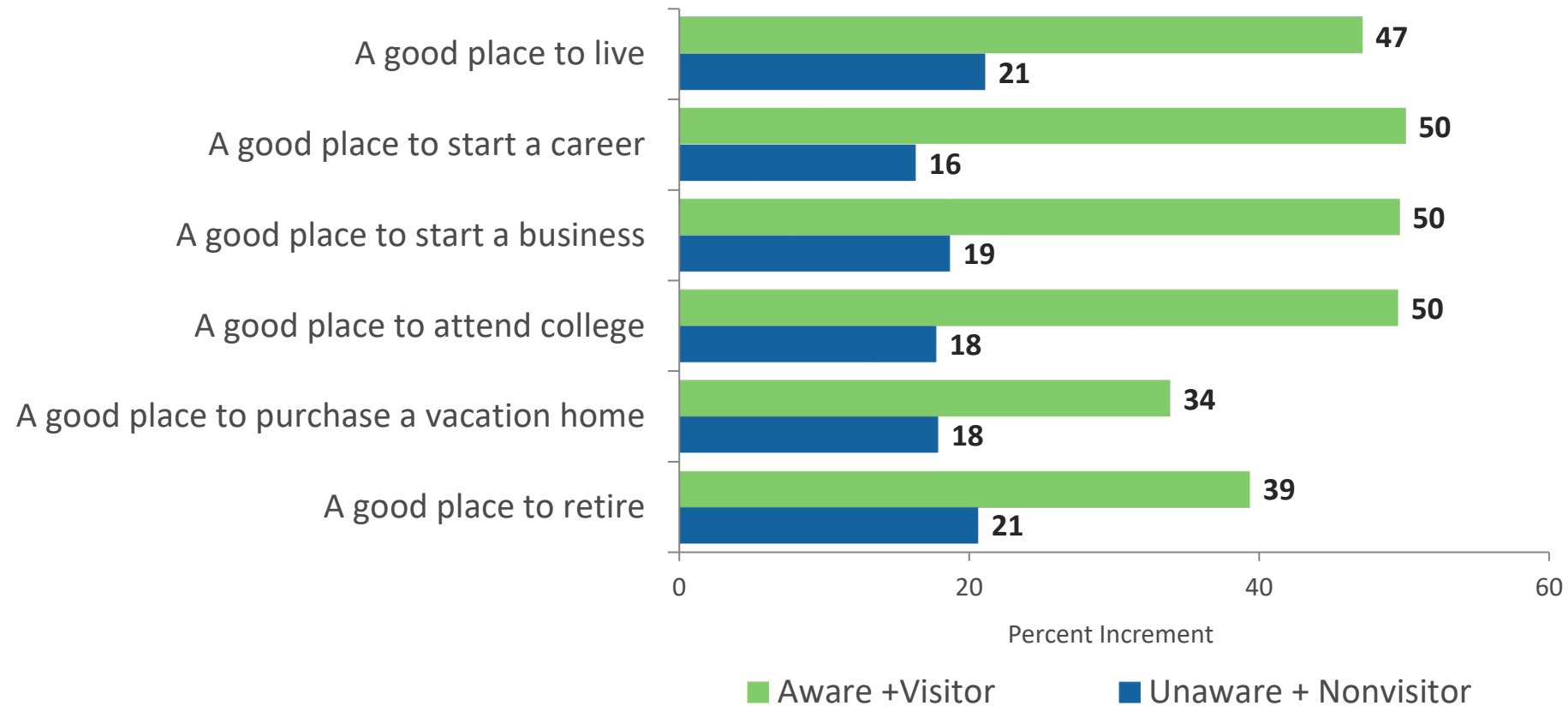
Impact of *Tourism Ad Awareness* on North Dakota's Economic Development Image



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



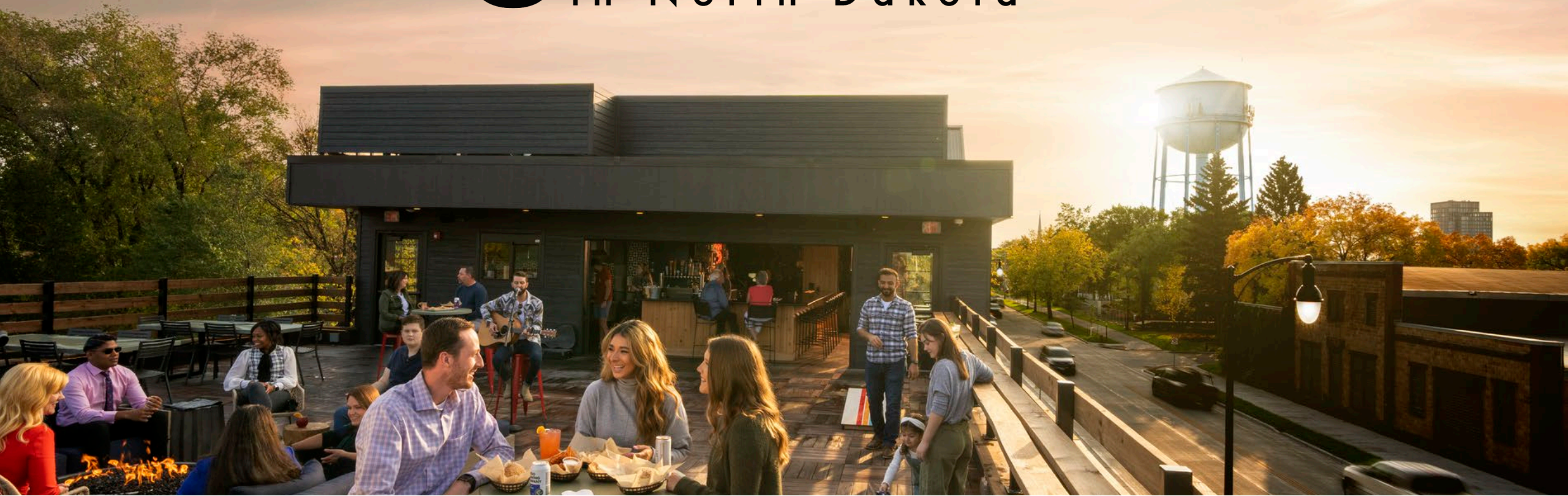
Impact of Ad Awareness *plus* Visitation on North Dakota's Economic Development Image





23. Today's tourist is tomorrow's talent

FIND THE
goodlife
in North Dakota



Toolkit at BeLegendary.link/FTGL

MEET THE NEW COMMISSIONER, JOSH TEIGEN

Goals

Tourism-Marketing directly ties to all
Commerce priorities:

- Business – economic development
- Workforce
- Main Street – community development
- Engaged partners and communities

Looking ahead ...



MAIN STREET ND

SUMMIT 2022

INSPIRING COMMUNITY-DRIVEN WORKFORCE

October 24–26 at the Bismarck Event Center

FREE REGISTRATION FOR ALL ATTENDEES

SESSION TOPICS INCLUDE:

- Common Traits in Thriving Communities
- Community Collaborations in Workforce Development
- Youth and the Workforce: What the Next Generation of Workforce is Looking for in Employment
- Innovative Solutions in Workforce Housing
- Creating a Community for all Generations
- Marketing and Digital Best Practices
- Best Practices in Inclusivity and Workforce
- AND MORE!



CHECK OUT THE AGENDA AND REGISTER

MainStreetSummitND.com