

# 2008

# tourism congress *Report*



DESTINATION MARKETING  
ASSOCIATION  
of  
*North Dakota*

*North Dakota*  
Tourism Alliance Partnership

*North Dakota*  
LEGENDARY



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# Abstract

This 2008 Tourism Congress Report was prepared by the North Dakota Tourism Alliance Partnership (TAP), the Destination Marketing Association of North Dakota (DMAND) and the North Dakota Department of Commerce Tourism Division (Tourism Division).

The purpose of the report is to:

- Identify the toughest challenges and growth opportunities shared by tourism stakeholders.
- Offer targeted, flexible strategies for tourism growth based on economic research and data that builds on North Dakota's natural strengths and tourism as a target industry with strong future growth potential.
- Identify tourism advancement initiatives with champions and objectives shared by the majority of tourism stakeholders.
- Mobilize tourism stakeholders to take action that will enhance the growth, sustainability and credibility of the industry.

A diverse group participated in the Tourism Congress process including federal, state and local elected officials; state agency heads; economic development representatives; university officials; legislators; students; and private and nonprofit business owners including convention and visitors bureaus, chambers of commerce, lodging establishments, food and beverage purveyors, retailers, and attractions and festivals.

# Acknowledgements

The 2008 Tourism Congress was made possible by the collaborative efforts of several individuals and organizations committed to growing the industry. We extend our sincere thanks to those who contributed their time, talent and/or resources, including:

**North Dakota Tourism Alliance Partnership (TAP)** – TAP was one of the coordinating organizations driving the Tourism Congress. TAP staff organized meetings and materials, promoted attendance, and prepared reports to document Congress results.

**Destination Marketing Association of North Dakota (DMAND)** – DMAND, also a coordinating organization, provided local hosts for the regional meetings and financial support for the overall effort.

**North Dakota Department of Commerce Tourism Division (Tourism Division)** – The Tourism Division, also a coordinating organization, provided industry information for regional and state meetings, compiled mailing lists, led registration efforts, paid facilitator travel expenses, and donated staff time and supplies.

**Local Hosts** – DMAND members (convention and visitors bureau staff) from across the state volunteered their time to coordinate facilities and media efforts for eight regional Tourism Congress meetings. Their organizations also assisted with expenses by covering refreshment and lodging fees (Appendix D).

**Facilitators/Speakers** – Dana Bohn, TAP executive director, facilitated the regional and state meetings. Sara Otte Coleman, Tourism Division director, addressed each regional meeting delegation, sharing research findings and providing a look at the economic impact of tourism on the state. Bill Shalhoob, TAP chairman, also traveled to each of the regional meetings and explained to participants the background and purpose of the Tourism Congress.

**Roundtable Leaders** – These individuals volunteered to lead roundtable discussions at the statewide Tourism Congress meeting. They demonstrated both their knowledge and leadership ability as they worked with colleagues to develop initiatives for advancing the industry (Appendix E).

Last but certainly not least, thanks to all of the tourism industry stakeholders who completed the online survey and participated in regional and/or state meetings, offering their expertise and creativity for the betterment of the industry. More than 500 participants came together to identify challenges and to brainstorm strategies for industry growth. This commitment from the grassroots level is an indication of the strength and future success of North Dakota tourism.

# Executive Summary

Tourism is one of the largest and fastest growing industries in North Dakota. The Travel Industry Association reports that from 2000-2005, the state experienced 20.8 percent growth in visitor spending, outpacing the national average of 14.7 percent. The economic effects of this growth are new jobs, higher wages and fewer taxes for residents. Each visitor to North Dakota adds approximately \$81 to the Gross State Product, according to Global Insight, a leading economic researcher.

To ensure these benefits for the state, its businesses and families into the future, industry stakeholders united during the 2008 Tourism Congress with the purpose of identifying common challenges and developing short- and long-term strategies to further grow the industry.

The effort was coordinated by the North Dakota Tourism Alliance Partnership (TAP), the Destination Marketing Association of North Dakota (DMAND) and the North Dakota Department of Commerce Tourism Division (Tourism Division).

More than 500 stakeholders participated via an online survey and/or regional and state meetings in March and April. Participants used economic impact and other Tourism Division research as a foundation for strategy development.

Results from participant input at each step of the process reveal that stakeholders view marketing, physical infrastructure, industry development and workforce as the greatest industry challenges. Four core strategies for addressing the challenges and growing the industry were developed. They are presented below, along with key initiatives that stakeholders proposed and prioritized for setting the strategies into motion.

**Marketing** – Secure the funds to be competitive regionally in marketing/technology and to support both in- and out-of-state marketing efforts

Initiative: Double the governor's tourism budget (Champions: TAP, DMAND)

**Physical Infrastructure** – Create opportunities for additional tourism business development through grants, loans and entrepreneur assistance; obtain tourism-friendly signage

Initiative: Increase Tourism Infrastructure and Expansion Grant program funding/eligibility and add a technology component; develop flexible loan programs (Champion: Kyle Blanchfield, Woodland Resort)

Initiative: Create tourism development specialist position(s) (Champions: Jodeen Bergstrom-Dean, City of Tioga, and Mary Lee Nielson, Sheyenne River Valley National Scenic Byway/Valley City CVB)

Initiative: Increase signage on state and federal highways, including the addition of logo signage on four-lane highways (Champion: Bobby Koepplein, Cass County Electric)

**Industry Development** – Increase regional collaboration to generate more visitors and longer stays

Initiative: Create regional alliances and virtual partnerships to cross-sell offerings and market destination vacation areas (Champions: Terri Thiel, Dickinson CVB, and Amy Krueger, Williston CVB)

**Workforce** – Initiate and support statewide efforts to increase available workforce

Initiative: Develop tourism workforce training programs (Champion: René LaFrance, Northeast Workforce Training)

Tourism Congress coordinators will continue to work with champions to turn these initiatives into action. Some will become proposed legislation; others will be driven by interested individuals, groups or state agencies. Progress will be monitored and reported at the 2009 Tourism Conference.

To learn how you can get involved in the Tourism Congress movement, visit [www.ndtourism.com/industry](http://www.ndtourism.com/industry) or contact Dana Bohn, Tourism Congress coordinator, at 701-355-4458 or [clearh2o@btinet.net](mailto:clearh2o@btinet.net).

# Background

## Tourism Industry

Tourism has a tremendous impact on North Dakota's economy. It is one of the largest private-sector employers and draws in visitors who make significant contributions to the prosperity of the state and its people.

Global Insight, a leading economic researcher, reports:

- Every 493 visitors to North Dakota create a job.
- Each visitor generates \$39 in wages for workers employed across an array of industries.
- The average visitor contributes about \$24 in tax receipts. (If tourism didn't exist, each household would pay on average \$636 more in taxes annually.)
- Each visitor adds approximately \$81 to the Gross State Product.

This impact is increasing with the industry's advancement. Travel Industry Association data shows that North Dakota experienced 20.8 percent growth in visitor spending from 2000-2005, outpacing the national average of 14.7 percent.

Continued growth requires an engaged and proactive industry. The 2008 Tourism Congress brought stakeholders together to identify common challenges and develop short- and long-term growth strategies, thus ensuring tourism's benefits into the future.

## Regional Meetings

The Tourism Congress regional meetings were a huge success with about 400 people, including legislators, mayors, local officials and business owners, attending the eight meetings throughout the state March 4-6 and 11-12 in the following locations:

- |               |               |             |             |
|---------------|---------------|-------------|-------------|
| ■ Minot       | ■ Williston   | ■ Dickinson | ■ Bismarck  |
| ■ Devils Lake | ■ Grand Forks | ■ Fargo     | ■ Jamestown |

During the meetings, stakeholders discussed tourism's economic impact, identified industry challenges and growth opportunities, developed strategies for growth, and prioritized programs and action items for the 2009 Legislative Session.

## Statewide Meeting

Findings from the Tourism Congress regional meetings and an online survey were presented at the North Dakota Tourism Conference April 22 in Mandan. More than 200 attendees had an opportunity to further identify and develop growth strategies and initiatives, and vote on priorities.

The ideas and data collected are contained in this report and will help shape plans for future growth of the tourism industry. Key initiatives will either become proposed legislation or be championed by interested individuals, groups or state agencies.

## Coordinators

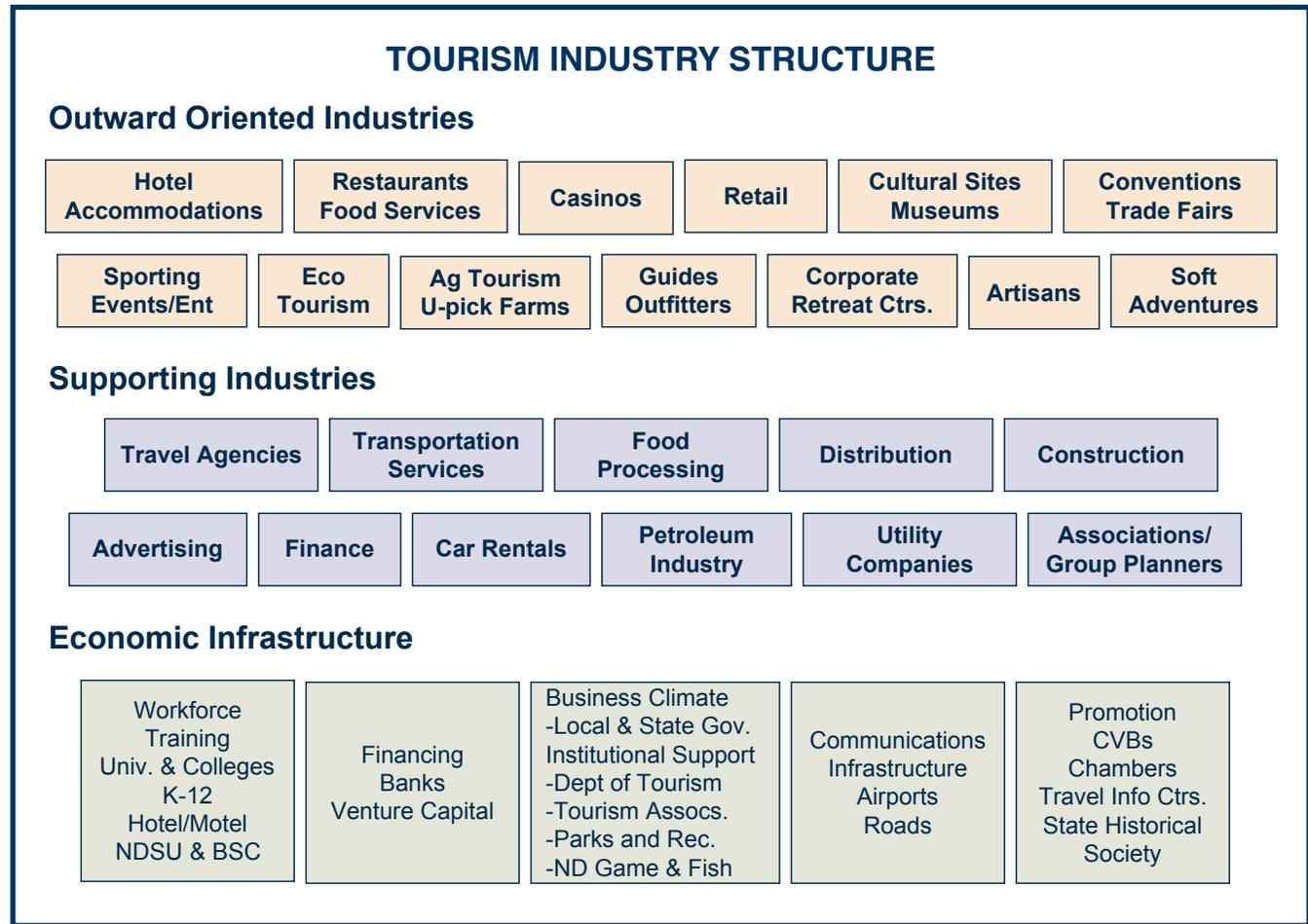
The Tourism Congress was coordinated by the North Dakota Tourism Alliance Partnership (TAP), the Destination Marketing Association of North Dakota (DMAND) and the North Dakota Department of Commerce Tourism Division (Tourism Division).

# Key Findings

## Vision and Structure

The opportunity that tourism development presents to North Dakota has been fully embraced by tourism stakeholders who attended the nine Tourism Congress meetings during March and April of 2008. They established a vision statement to guide the industry's growth and developed the tourism industry structure map below.

*North Dakota is the destination of choice for a global population wishing to have an authentic, customized, safe, quality experience in the unique cities and the wide-open spaces of the American West.*



## Major Challenges

### Tourism Division

Sara Otte-Coleman, Tourism Division director, shared a state perspective on industry challenges with Tourism Congress regional meeting participants. Highlights are presented below.

**Image** – North Dakota often has no image to outsiders and is assumed to be cold and flat. Media and paid advertising is creating a better image for North Dakota, as measured in advertising effectiveness research.

**Location** – Since North Dakota’s geographic location puts it hundreds of miles from target markets and population centers, it is difficult to bring visitors into the state. North Dakota is also a large state with many miles between attractions or activities, which presents another challenge.

**Product Strengths** – In many areas where North Dakota has a strong image or awareness, there is no depth of offering for the traveling public. One example is agriculture-based attractions, tours and activities.

**Limited Expansions** – Although demand for adventure-based vacations is growing nationally, North Dakota’s offering is not expanding to meet the demand. Liability insurance is one deterrent of growth in this sector.

**Retirements** – Like the energy industry, tourism is seeing many small business owners retire. Bed-and-breakfasts, retail outlets, etc., are not always being sold at retirement and, therefore, become industry losses. This is especially concerning in rural areas.

**Resources** – The Tourism Division is continually working to improve the efficiency of its marketing programs to compete with much larger budgets and staffs of other states. North Dakota ranks 47th in the nation in tourism funding and has the smallest budget compared to its neighbors and competitors.

### Stakeholders

Following are the top five challenge areas that industry stakeholders identified at the regional meetings and the top five challenge areas identified via the online survey. All challenges reported at the regional meetings are listed in Appendix A.

| <b>Regional Meetings</b>   | <b># of Votes</b> |
|----------------------------|-------------------|
| 1. Marketing               | 575               |
| 2. Physical infrastructure | 362               |
| 3. Industry development    | 270               |
| 4. Workforce               | 222               |
| 5. Finance                 | 99                |

| <b>Online Survey</b>  | <b>Rating<br/>(low #, high priority)</b> |
|---|--|
| 1. Human resources  | 3.72                                     |
| 2. Business resources                                       | 4.16                                     |
| 3. Adequate marketing for my business and finance (tie)     | 4.34                                     |
| 4. Business climate   | 4.40                                     |
| 5. Adequate marketing for the North Dakota Tourism Division | 4.56                                     |

## Growth Opportunities and Strategies

### Tourism Division

Tourism is one of the largest and fastest growing industries in North Dakota and has much potential for advancement. Listed below are several growth opportunities that were presented at the regional meetings by Sara Otte Coleman, Tourism Division director.

- Increased marketing will yield increased visitor spending and will improve the image of the state. This has been proven through numerous research studies.
- As the U.S. population (and that of the world) becomes more urban, there will be increased interest in rural landscapes and experiences.
- The better trained front-line tourism employees are, the higher the payback will be to the state through longer stays and repeat visits.
- Although the weak U.S. dollar has presented challenges, it helps attract Canadians as well as other international visitors.
- The “build it and they will come” philosophy can be debated, but the more attractions and experiences the state has to sell, the better the results will be.
- Online sales of travel now exceed traditional sales. If North Dakota has more product for sale online, the state will sell more trips.
- Visitors are time-challenged. The easier it is for them to buy North Dakota trips, the more visits there will be. The industry should continue to package offerings.
- There are many untold North Dakota stories to pitch to the media. Their return will be millions of dollars in earned regional and national media.
- North Dakota has some of the best outdoor resources in the country. The industry needs to recognize this as an asset and work together to promote the outdoors, while simultaneously managing the resources to maintain their future value.

### Stakeholders

Tourism industry stakeholders ranked recreation and accommodations as the top two sectors that need emphasis in order to grow.

| <u>Online Survey</u> | <u>Rating</u><br>(low #, high priority) |
|----------------------|---|
| 1. Recreation        | 2.21                                    |
| 2. Accommodations    | 2.51                                    |
| 3. Retail            | 3.12                                    |
| 4. Food              | 3.38                                    |
| 5. Transportation    | 3.67                                    |

A summary of the strategies and initiatives for advancing tourism from the regional meetings and the online survey can be found in Appendix C. A complete list of all initiatives from each region can be found in Appendix B.



Fargo



Devils Lake



Bismarck



Jamestown

## Statewide Initiatives for Advancement

Stakeholders at the statewide Tourism Congress meeting further developed promising regional initiatives and identified new initiatives. Then, they voted on the initiatives to establish priorities. Following is the list of statewide initiatives grouped by challenge areas in order of votes. The top five initiatives are highlighted.

### I. Marketing and Technology (351 votes)

- (155) Convince the governor to double the tourism budget
- (54) Develop an online campaign, a “Legendary Insiders” competition to invite visitors and North Dakotans to tell their “Legendary Stories”
- (45) Expand technological access to North Dakota communities
- (42) Market destination vacation areas
- (27) Market the diversity of North Dakota
- (18) Develop a significant in-state marketing campaign
- (10) Develop the North Dakota YouTube channel and industry blog

### II. Physical Infrastructure (252 votes)

- (83) Secure logo signage for four-lane highways throughout North Dakota
- (68) Place North Dakota Tourism representatives in Regional Council offices across the state
- (36) Secure funding for Theodore Roosevelt Expressway study for Highway 85 expansion; fund and expand scenic byway programs
- (34) Create a development position at North Dakota Tourism
- (31) Enhance the physical infrastructure grant program and add a technology component

### III. Industry Development (71 votes)

- (37) Create regional alliances with existing marketing tools (websites) and be sure tools all work together
- (34) Create virtual partnerships

### IV. Workforce (35 votes)

- (35) Develop a high school curriculum/class/training for tourism-based opportunity

### V. Finance (23 votes)

- (23) Increase funding from legislature; develop programs (grants, loans with more flexibility)



## Legislative Action Items

Following is a list of possible legislation derived from challenges, strategies and initiatives identified during the Tourism Congress meetings and from survey results. Based on the overwhelming number of votes for initiatives to gain more money for marketing, TAP will make this its number one priority in the 2009 Legislative Session.

### Marketing

- Double the governor's tourism budget to allow the resources needed to be competitive regionally in marketing and technology
- Create a formula-based funding source for tourism marketing and research
- Budget state funding for the implementation of an organized system of Visitor Information Centers (VICs)

### Tourism Enhancements/Product Development

- Increase the Tourism Infrastructure and Expansion Grant program funding/eligibility and add a technology component
- Create tourism development specialist position(s)
  - Create a development position at North Dakota Tourism
  - Place North Dakota Tourism representatives in Regional Council offices across the state
- Create more opportunities for tourism as a primary sector business to access state and local funding
  - Increase funding from legislature
  - Develop programs (grants, loans with more flexibility)
- Support North Dakota Heritage Center expansion legislation
- Secure funding for Theodore Roosevelt Expressway study for Highway 85 expansion
- Fund and expand scenic byway programs (includes signage)

### Workforce

- Support legislation and statewide efforts to increase and enhance the tourism workforce
  - Develop high school curriculum/class/training for tourism-based opportunities

### Signage

- Create a highway signage program that would allow identification of local hospitality businesses to travelers
  - Secure logo signage for four-lane highways throughout North Dakota
  - Increase signage on state and federal highways

### Hunting and Fishing

- Support hunting and fishing legislation that promotes free enterprise, encourages additional public access and has a positive economic impact on North Dakota

### Liability and Insurance

- Support legislation regarding liability and affordable insurance issues for recreational/nature-based tourism businesses

# Outcomes

The Tourism Congress outcomes are as follows:

- Created a vibrant environment of engaged and proactive tourism leaders
- United stakeholders by bringing them together to identify common challenges and opportunities
- Built and implemented a framework for developing short- and long-term growth strategies
- Identified four core strategies for industry growth
- Developed tourism advancement initiatives with champions and objectives shared by the majority of tourism stakeholders

## Core Strategies

The combined results from each step of the Tourism Congress process revealed four core strategies for industry growth. They are presented below, along with key initiatives that stakeholders proposed and prioritized for setting the strategies into motion.

**Marketing** – Secure the funds to be competitive regionally in marketing/technology and to support both in- and out-of-state marketing efforts

Initiative: Double the governor’s tourism budget (Champions: TAP, DMAND)

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**Workforce** – Initiate and support statewide efforts to increase available workforce

Initiative: Develop tourism workforce training programs (Champion: Rene´ LaFrance, Northeast Workforce Training)



Dickinson



Minot



Williston



Grand Forks

# Next Steps

After reviewing tourism economic impact research, identifying common challenges and opportunities, and developing and prioritizing strategies and initiatives for industry growth, it's time for action! Between now (Summer 2008) and the next Tourism Conference (April 20-22, 2009), several action steps will be taken by a "network of responsables" to address the four core strategies and implement key initiatives.

## Network of Responsibles

The coordination team, local hosts and initiative champions will serve as the "network of responsables" and will support each other in following through with the initiative development phase (May – August 2008) and the implementation phase (September 2008 – October 2009).

**Initiative Champions** – Individuals are encouraged to take action to implement initiatives that are priorities within their community, organization or business.

**Local Hosts** – Convention and visitors bureaus (CVBs) in the eight cities where regional meetings were held have already started and will continue to support the efforts of initiative champions that are consistent with the mission and goals of the local CVB.

**Coordination Team** – TAP, DMAND and the Tourism Division have already started and will continue to work with champions to refine action plans and implement initiatives that coincide with their missions.

The coordination team will also develop an overall implementation strategy that keeps the legislative actions, initiatives and ongoing tourism outreach efforts moving forward and monitors the implementation of major initiatives.

**Legislative Agenda** – TAP will develop a legislative action team comprised of key legislators and industry leaders to develop a legislative agenda for industry growth based on the Tourism Congress findings. TAP will also lead in further developing and implementing the tourism legislative agenda and work with the Tourism Division on future studies to determine the economic growth and impacts of the industry.

## Reporting Success

The coordination team, local hosts and initiative champions will be invited to share their individual, community and statewide accomplishments and implementation progress at the 2009 North Dakota Tourism Conference.

**2009 Tourism Conference**  
**Canad Inn, Grand Forks**  
**April 20-22**

## Get Involved

**Join the Tourism Congress movement today!**

**Visit [www.ndtourism.com/industry](http://www.ndtourism.com/industry) to:**

- Read this report.
- Sign up for the Tourism Division newsletter, which will include periodic Tourism Congress updates.
- Volunteer to assist champions with specific initiative implementation.
- Support tourism outreach efforts.

Contact **Dana Bohn** at 701-355-4458 or  
[clearh2o@btinet.net](mailto:clearh2o@btinet.net) to:

- Volunteer to assist with legislative efforts by contacting legislators or providing testimony.

# *Appendices*

**A – Regional Meeting Challenges**

**B – Regional Meeting Initiatives**

**C – Regional Meeting Strategy and Initiative Summaries**

**D – Regional Meeting Local Hosts**

**E – Statewide Meeting Roundtable Leaders**

## Appendix A: Regional Meeting Challenges

|   | Votes | Region      |   | Votes | Region      |
|---|-------|-------------|---|-------|-------------|
| <b>Marketing</b>  |       |             | <b>575</b>                                      |       |             |
| Small marketing budgets                                   | 4     | Minot       | Tourism culture                                 | 6     | Minot       |
| Don't market variety                                      | 3     | Minot       | Recognizing economic impact of tourism          | 14    | Williston   |
| Direct focus, best use of limited advertising             | 3     | Minot       | Marketing partnerships                          | 14    | Williston   |
| Lack of image, identification of attractions              | 6     | Minot       | Educate on value of tourism                     | 18    | Dickinson   |
| Stereotype/image  | 15    | Williston   | Need regional subdivision                       | 11    | Dickinson   |
| Regional marketing  | 5     | Williston   | Unified tourism businesses                      | 6     | Dickinson   |
| Better marketing to improve image & existing attractions  | 13    | Williston   | Develop tourism entrepreneurship program        | 1     | Dickinson   |
| Better marketing of local attractions                     | 10    | Dickinson   | Attitude toward tourism opportunities           | 20    | Dickinson   |
| Year-round marketing                                      | 5     | Dickinson   | Implement action plan                           | 15    | Devils Lake |
| Increase budget for all marketing                         | 11    | Dickinson   | Support tourism-related agencies/businesses     | 21    | Devils Lake |
| Better storytellers                                       | 8     | Dickinson   | Regional destination                            | 38    | Devils Lake |
| More in-state marketing                                   | 15    | Dickinson   | Cohesiveness                                    | 11    | Grand Forks |
| Image/awareness   | 9     | Dickinson   | Lack of entrepreneurs                           | 2     | Grand Forks |
| Marketing money   | 28    | Bismarck    | Cooperative efforts/scheduling                  | 27    | Grand Forks |
| Image in and out of state                                 | 22    | Bismarck    | Industry unity                                  | 2     | Fargo       |
| In-state awareness  | 18    | Bismarck    | More partnerships                               | 2     | Fargo       |
| Niche marketing   | 8     | Bismarck    | Perception of industry                          | 36    | Fargo       |
| Draw more visitors  | 12    | Bismarck    | Local support of tourism industry               | 8     | Jamestown   |
| National awareness  | 25    | Devils Lake | Lack of recognition of tourism potential        | 18    | Jamestown   |
| Marketing/education in and out of state                   | 10    | Devils Lake |   |       |             |
| Highway 2 in materials for promotion                      | 9     | Devils Lake | <b>Workforce</b>                                |       |             |
| Marketing International Peace Gardens                     | 7     | Devils Lake | <b>222</b>                                      |       |             |
| Money for more marketing                                  | 16    | Devils Lake | Workforce                                       | 10    | Minot       |
| Advertising   | 17    | Devils Lake | Quality employees                               | 8     | Minot       |
| More online marketing                                     | 11    | Devils Lake | Labor shortage and quality                      | 25    | Williston   |
| Image of ND (knowledge/value)                             | 30    | Grand Forks | Need for employees                              | 21    | Dickinson   |
| Dollars for marketing                                     | 21    | Grand Forks | Customer service attitude                       | 12    | Dickinson   |
| Innovative marketing tools                                | 5     | Grand Forks | Workforce                                       | 14    | Bismarck    |
| Help planning/coordinating marketing                      | 8     | Grand Forks | Competitive salaries                            | 2     | Bismarck    |
| More dollars  | 24    | Fargo       | Staff buy-in (training)                         | 12    | Bismarck    |
| Perception of ND and tourism industry                     | 30    | Fargo       | Workforce                                       | 22    | Devils Lake |
| Major competition   | 8     | Fargo       | Front-line training                             | 18    | Devils Lake |
| Marketing entire state                                    | 14    | Fargo       | Salaries  | 17    | Devils Lake |
| Celebrate central lowlands (regional marketing)           | 11    | Fargo       | Labor shortage                                  | 10    | Grand Forks |
| Image (internal/external)                                 | 45    | Fargo       | Training of staff                               | 4     | Grand Forks |
| Boring - nothing to do - pass through state attitude      | 6     | Fargo       | Quantity/quality labor                          | 26    | Fargo       |
| Funding for regional promotion                            | 12    | Jamestown   | Lack of volunteers                              | 3     | Jamestown   |
| Money for more marketing                                  | 16    | Jamestown   | Labor - lack of quality and quantity            | 18    | Jamestown   |
| Image of ND - negative perception                         | 24    | Jamestown   |   |       |             |
| Promotion (in-state awareness/education)                  | 16    | Jamestown   | <b>Finance</b>                                  |       |             |
| Packaging co-op promotions                                | 3     | Jamestown   | <b>99</b>                                       |       |             |
| Promotion of nationally known sites (e.g., Peace Gardens) | 12    | Jamestown   | More money                                      | 2     | Bismarck    |
|   |       |             | Financial support                               | 37    | Devils Lake |
| <b>Physical Infrastructure</b>                            |       |             | <b>362</b>                                      |       |             |
| Lack of attractions                                       | 7     | Minot       | Insurance                                       | 11    | Devils Lake |
| Hotels, food, airports, etc.                              | 15    | Minot       | Money in general                                | 7     | Grand Forks |
| Location, access/transportation                           | 11    | Williston   | Money for development                           | 15    | Fargo       |
| Lack of hotels  | 15    | Williston   | Lack of money in general                        | 27    | Jamestown   |
| Lodging   | 5     | Dickinson   |   |       |             |
| Icon signs  | 25    | Dickinson   | <b>Business Climate</b>                         |       |             |
| Accessibility   | 8     | Dickinson   | <b>58</b>                                       |       |             |
| Lodging   | 4     | Bismarck    | Unidentified                                    | 1     | Williston   |
| High cost of gas, air...                                  | 16    | Bismarck    | Insurance/liability                             | 4     | Dickinson   |
| Aging infrastructure                                      | 4     | Bismarck    | "Mom-and-pop" vs. chains                        | 4     | Bismarck    |
| Lack of rural lodging near attractions                    | 11    | Bismarck    | Public and legislative support                  | 16    | Bismarck    |
| State funding to replace federal earmarks                 | 4     | Bismarck    | Support   | 1     | Fargo       |
| More attractions to hold people                           | 20    | Bismarck    | Hunting issues                                  | 6     | Fargo       |
| New niches and services                                   | 17    | Devils Lake | Legislative support                             | 26    | Fargo       |
| Airline service   | 13    | Devils Lake |   |       |             |
| Fuel prices   | 8     | Devils Lake | <b>Other</b>                                    |       |             |
| Lodging   | 2     | Devils Lake | <b>45</b>                                       |       |             |
| General infrastructure                                    | 26    | Devils Lake | Short seasons                                   | 11    | Devils Lake |
| Cost of travel  | 9     | Grand Forks | Weather   | 9     | Grand Forks |
| Lack of attractions/events                                | 16    | Grand Forks | Population                                      | 2     | Fargo       |
| Airline service   | 5     | Grand Forks | East vs. West                                   | 20    | Fargo       |
| Funding for arts/attractions                              | 26    | Fargo       | Resistance to change                            | 3     | Jamestown   |
| Lack of lodging in west                                   | 3     | Fargo       |   |       |             |
| Lodging near points of interest                           | 10    | Fargo       | <b>Quality of Life</b>                          |       |             |
| Few airports  | 2     | Fargo       | <b>19</b>                                       |       |             |
| Lack of city experiences                                  | 5     | Fargo       | Lake level's impact                             | 19    | Williston   |
| Transportation costs                                      | 20    | Fargo       |   |       |             |
| Few attractions   | 7     | Fargo       | <b>Technology</b>                               |       |             |
| Travel costs  | 4     | Jamestown   | <b>12</b>                                       |       |             |
| Lack of nationally recognized parks                       | 7     | Jamestown   | Technology used for better sales, communication | 6     | Minot       |
| Signage   | 12    | Jamestown   | Adequate technology                             | 1     | Dickinson   |
| Attraction development                                    | 11    | Jamestown   | Access to information                           | 5     | Fargo       |
| Additional services at facilities (parks...)              | 4     | Jamestown   |   |       |             |
| Airlines, businesses, roads, etc.                         | 2     | Jamestown   |   |       |             |
| Signage   | 8     | Jamestown   |   |       |             |

## Appendix B: Regional Meeting Initiatives

|   | Votes | Region      |   | Votes  | Region      |             |
|---|-------|-------------|---|--|-------------|-------------|
| <b>Marketing</b>  |       |             | <b>356</b>  |  |             |             |
| Tell/show story on the national level (research production, other states' examples, resources, partner with energy/private) | 7     | Minot       | <b>Industry Development</b>   | <b>78</b>  |             |             |
| Agency coordination (promotion together, news/public together)  | 3     | Minot       |   | Develop local tourism toolbox  | 9           | Minot       |
| Legislative - request more state marketing dollars  | 3     | Williston   |   | Creating stronger partnerships   | 7           | Williston   |
| Promotion of what we have   | 9     | Williston   |   | More cooperative ventures (rural associations, more packages, golf, fishing, arts....niches)               | 22          | Bismarck    |
| Partner in marketing and education opportunities in ND  | 3     | Dickinson   |   | Develop niche businesses to support visitors (e.g., birding)   | 20          | Devils Lake |
| Continue to motivate travelers after they arrive in the state (VIC - staffing/funding, technology)                          | 22    | Dickinson   |   | Spread out major events  | 7           | Grand Forks |
| Define our image  | 13    | Dickinson   |   | More partnerships  | 6           | Fargo       |
| Training for tour guides  | 4     | Bismarck    |   | Packages to help with distances between sites (coordinated planning)                                       | 7           | Fargo       |
| Marketing to our youth  | 13    | Bismarck    |   | <b>Workforce</b>   |             |             |
| Use natural resources to extend stays   | 7     | Bismarck    |   | <b>64</b>  |             |             |
| Expand ND Heritage Center to be the hub to link travel experiences  | 13    | Bismarck    |   | Increasing tourism industry wages  | 5           | Minot       |
| Tourism website template for day trips with linkage to significant sites  | 5     | Bismarck    |   | Out-of-state marketing, state and local (HR/housing)   | 9           | Williston   |
| Marketing (good price/value relationship, good weather)   | 9     | Bismarck    |   | Increase workforce by providing flexible schedules for tourism training                                    | 1           | Bismarck    |
| Market region (packages, fill gaps in services available, DMAS for region)  | 25    | Devils Lake |   | Enable senior workforce (part-time interest, sunbirds, rural interest)                                     | 6           | Bismarck    |
| Online advertising (search engine optimization, technical assistance to help develop web site, expand listings)             | 13    | Devils Lake |   | Hospitality training (front-line vs. careers, offering incentives and better pay for professional service) | 9           | Devils Lake |
| Money for tourism marketing (grants, state sales tax, license plates for fee)   | 12    | Devils Lake |   | Hospitality training (seminars)  | 2           | Grand Forks |
| Money for year-round promotions (snow is sexy, winter-time activities)  | 12    | Devils Lake |   | Keep young people in ND for tourism jobs (educate on variety of opportunities)                             | 15          | Fargo       |
| In-state advertising (kiosk - touch screen in rest areas, signage - brown highway signs)                                    | 21    | Devils Lake |   | Human resources issues (training, educate on quality of place/life)  | 7           | Fargo       |
| Feature International Peace Garden in promotions/expand infrastructure at gardens   | 7     | Devils Lake |   | Better trained workforce for tourism (volunteer trainers - hospitality training)                           | 10          | Jamestown   |
| Stretch marketing (collaboration/cooperative, theme-based linkage, centralized data collection for use in marketing)        | 12    | Grand Forks | <b>Physical Infrastructure</b>  |  |             |             |
| Linking events with attractions (cross-selling)   | 6     | Grand Forks | <b>59</b>   |  |             |             |
| Weather (change perceptions, show all seasons in ads)   | 8     | Grand Forks | Tourism entrepreneurship (infrastructure grants, tourism development specialist, inventory of tourism businesses) | 6  | Minot       |             |
| Selling in humor (Fargo style)  | 3     | Grand Forks | Funding to expand, maintain Highway 85 and promote  | 8  | Williston   |             |
| Kiosks to cross sell  | 2     | Grand Forks | Icon advertising (logo signs for business promotion)  | 24   | Dickinson   |             |
| Market diversity of ND (experiences, ecotourism)  | 12    | Fargo       | Build attractions (linking attractions/events...regionally)   | 5  | Devils Lake |             |
| Internal cheerleading (improve self image, front-line hospitality training, centralized calendars)                          | 22    | Fargo       | Funding for attraction development (state funding, foundation)  | 11   | Grand Forks |             |
| Marketing strategies (survive ND, combine country with city)  | 8     | Fargo       | Affordable signs for tourism businesses (interstate signs - logo - off-interstate signs)                          | 5  | Jamestown   |             |
| Additional money to market ND (sales tax)   | 8     | Fargo       | <b>Finance</b>  |  |             |             |
| Promote agriculture (sell experiences in both east and west, laid-back getaway)   | 19    | Fargo       | <b>25</b>   |  |             |             |
| Marketing - positives (formal tours offered, packages)  | 10    | Jamestown   | Financial assistance for tourism businesses (public funding for public facilities)                                | 5  | Devils Lake |             |
| Increasing local money for marketing (co-ops with other cities, attractions, trade-offs, collaborations)                    | 11    | Jamestown   | Increase funding for tourism (implement tax, more grants)   | 20   | Jamestown   |             |
| Need to engage locals through regional tourism (reps - through ND Dept. of Commerce Tourism)                                | 34    | Jamestown   | <b>Business Climate</b>   |  |             |             |
|   |       |             | <b>13</b>   |  |             |             |
|   |       |             | Strong voice for industry (legislators)   | 13   | Fargo       |             |
|   |       |             | <b>Technology</b>   |  |             |             |
|   |       |             | <b>4</b>  |  |             |             |
|   |       |             | Funding support to expand technology (train tourism operators to use technology)                                  | 4  | Fargo       |             |
|   |       |             | <b>Quality of Life</b>  |  |             |             |
|   |       |             | <b>0</b>  |  |             |             |
|   |       |             | Seek federal lake dollars for infrastructure development  | 0  | Williston   |             |
|   |       |             | 48-inch pipeline to Colorado  | 0  | Williston   |             |

## Appendix C: Regional Meeting Strategy and Initiative Summaries (Page 1)

### **Marketing**

#### **Use various media to tell North Dakota's stories**

- Research the possibility of a North Dakota-based television program
- Increase and improve online national advertising
- Use airport terminals, trains and bus stations as marketing avenues
- Implement a cell-phone-driven "Highways to North Dakota History Program"
- Initiate a competition for a series of booklets on little-known, but fun, aspects of our state

#### **Collaborate for more efficient/effective marketing**

- Work together (public and news agencies) to tell about tourism attractions and accommodations
- Market destination vacation "areas" with various day trips
- Work together to asset map the state and compare it to national/statewide data to identify linkages for use in theme-based marketing
- Cross-promote events and attractions
- Promote community packages/tours
- Combine local event calendars to create one-stop access to events

#### **Educate North Dakotans for image improvement**

- Educate service industry (gas station, hotel) employees about tourism offerings
- Develop checklists (passports) of attractions
- Create partnerships to market and educate people about the opportunities in North Dakota
- Educate North Dakota youth on the state's assets so that they become spokespersons
- Train tour guides
- Initiate regional tourism offices to engage North Dakotans
- Get hard numbers to tell business leaders how tourism affects their bottom line

#### **Advertise within North Dakota**

- Seek incremental budgeting to fund visitor centers
- Expand North Dakota Heritage Center to be the hub to link travel
- Create a tourism template for day trips with linkage
- Develop a searchable kiosk system to market tourism offerings for use in rest areas, travel centers, chambers of commerce, hotels, etc.
- Put laptops in hotel lobbies with links to tourism information
- Design a campaign to get North Dakotans to visit their own attractions

#### **Obtain more money to market tourism**

- Convey to legislators the dollars that tourism brings in versus what is paid for in marketing
- Use a percentage of all sales tax for tourism marketing
- Use a percentage of license plate fees for tourism marketing
- Appoint someone to research out-of-state grant opportunities
- Pursue dollars for year-round promotion (including winter-time activities)
- Reinstate the Lewis and Clark lodging tax (possibly lowering the rate and expanding the base to car rentals, bars, restaurants, etc.)
- Form marketing package deals to trade promotions and get discounts

## Appendix C: Regional Meeting Strategy and Initiative Summaries (Page 2)

### ***Marketing*** *continued*

#### **Evaluate/change marketing strategies**

- Define industry image
- Market natural resource packages to extend stays
- Promote high-value/low-cost vacationing
- Gather statistics to promote good weather
- Feature International Peace Garden in all promotions
- Show all seasons in ads
- Use humor to sell (Fargo style)
- Market diversity of North Dakota
- Market “experiences” (agriculture, winter, etc.)
- Market ecotourism
- Embrace extreme weather and sell it to adventurous markets
- Market laid-back getaways

### ***Physical Infrastructure***

#### **Build more attractions/encourage tourism entrepreneurship**

- Get more funding and promotion for the North Dakota Tourism Infrastructure and Expansion Grants
- Initiate a Department of Commerce tourism development specialist position
- Develop community assets profiles
- Create a foundation to support attraction development
- Pursue funding for increased lodging accommodations (possibly used for other purposes in the off-season)

#### **Improve transportation routes**

- Study other highway development projects and secure funding to properly expand and maintain highways (e.g., Highway 85)
- Make county road improvements in scenic areas

#### **Improve signage for visitors**

- Pursue affordable signage options

#### **Enhance existing infrastructure**

- Investigate options for beneficial uses of lake water (pipelines) to maintain more water in Lake Sakakawea
- Seek federal lake dollars for infrastructure development at lake sites

### ***Industry Development***

#### **Form partnerships**

- Develop stronger partnerships within communities and among businesses
- Create local/regional hospitality associations
- Create cooperative ventures (packages)
- Coordinate planning throughout city/area to spread out major events
- Increase partnerships between arts and attractions
- Facilitate tours to transport visitors between sites
- Pursue Allegiant Air tourist packages

## **Appendix C: Regional Meeting Strategy and Initiative Summaries (Page 3)**

### ***Industry Development*** *continued*

#### **Develop industry tools**

- Create local tourism “toolboxes” to identify and promote attractions
- Develop state software for bookings and reservations

#### **Increase/expand niche offerings**

- Seek dollars/advertising help to develop/sell offerings unique to the area
- Develop family recreation to support hunting, fishing, etc.

### ***Workforce***

#### **Increase the quantity/quality of workers**

- Complete a study to determine attractive wages
- Bring in new, larger businesses with higher wages
- Recruit workers through out-of-state marketing
- Increase available housing for workers
- Offer hospitality training (actual college program or customer service sessions)
- Provide flexible (off-season) education schedules for college tourism students
- Create and market job opportunities for young people to keep them in state
- Enable the senior workforce
- Train volunteers to be trainers for other tourism employees
- Reform international workforce policy
- Provide state incentives to attract entry-level workers/retain young people
- Provide education incentives/loan waivers for 2-year, 4-year and trade schools

### ***Finance***

#### **Find sources of financial assistance for tourism businesses**

- Seek public funding for public facilities
- Increase number and size of local grants
- Implement tourism-specific taxes (lodging, restaurants, etc.)
- Establish or increase user fees

### ***Business Climate***

#### **Create a stronger voice for the industry among legislators**

- Meet with legislators to educate them on issues and to propose legislation
- Voice the impact of liability issues on agri-tourism and small/start-up tourism businesses
- Educate a group of ourselves to appeal to and lobby our legislators
- Explain the importance of a legislative change in out-of-state hunting policy/prices

### ***Technology***

#### **Increase technology knowledge/infrastructure throughout the state**

- Seek funding for technology tools/trends education
- Form partnerships to exchange technology knowledge
- Seek funding for expansion of technology infrastructure
- Expand technological access to smaller communities

## Appendix D: Regional Meeting Local Hosts

**Wendy Howe, Minot**

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**Amy Krueger, Williston**

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**Terri Thiel, Dickinson**

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**Terry Harzinski, Bismarck**

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**Judy Hoffer, Devils Lake**

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**Julie Rygg, Grand Forks**

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**Nina Sneider, Jamestown**

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## **Appendix E: Statewide Meeting Roundtable Leaders**

### **Marketing and Technology**

Wendy Howe, Minot CVB  
Kim Schmidt, Tourism Division  
Teri Onsgard, Fargo-Moorhead CVB  
Sara Otte Coleman, Tourism Division  
Julie Rygg, Greater Grand Forks CVB  
Annette Schilling, Tourism Division  
Randy Hatzenbuehler, T.R. Medora Foundation  
Judy Hoffer, Devils Lake CVB  
Cole Carley, Fargo-Moorhead CVB  
Jim Fuglie, T.R. Medora Foundation  
Wade Westin, T.R. Medora Foundation  
Heather LeMoine, Tourism Division  
Scott Wild, iNet Technologies  
Tricia Miller, Tourism Division

### **Physical Infrastructure**

Tracy Potter, Fort Abraham Lincoln Foundation  
Gene Veeder, McKenzie County JDA  
Bobby Koeplin, Cass County Electric  
Ken Kadrmas, North Dakota DOT  
Mark Zimmerman, Tourism Division

### **Industry Development**

Terri Thiel, Dickinson CVB  
Deanne Felchle, Tourism Division  
Amy Krueger, Williston CVB  
Scooter Pursley, Tourism Division  
Tammy Backhaus, Tourism Division  
Terry Harzinski, Bismarck-Mandan CVB  
Nina Sneider, Buffalo City Tourism

### **Workforce**

Maria Effertz Hanson, Black Butte Adventures

### **Finance**

Kyle Blanchfield, Woodland Resort  
Fred Walker, Tourism Division

### **Business Climate**

David Borlaug, Lewis & Clark Fort Mandan Foundation

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