



# IDDC Strategic Plan

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## Executive Summary

The goal of the strategic planning process that was undertaken by the Indiana Destination Development Corporation (IDDC) was to surface priorities and recommend a path forward to further the mission of attracting and retaining talent, retaining graduates from Indiana higher education institutions and attracting new visitors and converting them into new residents of the state.

With this in mind, the IDDC commissioned JLL's Strategic Advisory division, in partnership with Longwoods International, to conduct detailed research and analysis on the State of Indiana's assets, understand stakeholder needs, visitor perceptions and set goals as an organization to support and grow the industry.

Stakeholder research included nine listening sessions across the state and over 600 survey responses from members of the leisure and hospitality industry, economic development and state and local government. The themes of the stakeholder feedback were consistent. The primary theme was on the need for a brand and messaging platform to tell Indiana's story and improve the perception of the state. Additionally, a second key theme was the need for improved positioning of existing assets and investment in new assets to develop the destination and improve quality of life across the state.

In addition to hearing from stakeholders, visitor research was conducted to understand the current visitor profiles and travel trends as well as the perception that different target markets have when it comes to the state for visitation as well as relocation for work. The visitor research confirmed the key themes of the stakeholder feedback, i.e., the need to control its narrative through a brand platform with consistent messaging and that the state would benefit from continued investment in assets both quality of life and visitor-facing attractions.

In order to be successful in its mission of attraction within its three areas of focus (talent, student retention and visitors), the strategic plan identifies specific priorities each with recommendations, action items, partners for collaboration and resources needed for implementation. The priority areas included in this plan are as follows:

1. Improve Indiana's Brand Image & Perception
2. Retain & Attract Talent
3. Retain Indiana Graduates
4. Attract and Convert Visitors
5. Formulate Destination Asset Development Strategy

As a new organization in its first fiscal year of operation, this plan will be critical to moving the mission forward in the respective areas of attraction.

## Current Positioning & Research Summary

As stated in the Executive Summary, a significant amount of research was completed on behalf of the IDDC to determining the current positioning of the State of Indiana when it comes to the three areas of focus: attracting and retaining talent, retaining graduates from Indiana higher education institutions and attracting new visitors and converting them into new residents of the state.

The research program kicked off with a concerted effort to listen and learn from stakeholders across the state. A series of listening sessions were held in nine locations across the state where stakeholders were asked about perceptions, challenges, new opportunities and top priorities for Indiana in the areas of visitor and talent attraction. To further the listening sessions, a stakeholder survey was also conducted to dig deeper into the sentiments received from the listening sessions. The survey was completed by over 600 stakeholders in leisure and hospitality, economic develop and government. The top two priorities that emerged from the stakeholder sessions included the following:

1. Brand Messaging – the need to establish a brand identity/message for the State of Indiana to use in promoting the quality of life to drive awareness and improve the perception of Indiana to prospective talent, visitors and residents alike.
2. Destination & Quality of Place Investments – the need to further invest both public and private dollars to increase the assets that cause a visit as well as those amenities that support a high quality of life for those living in, or considering relocating to, Indiana.

Outcomes from this research was further validated through an Image Study which was conducted reaching a panel of US households to understand different geographic and demographic markets' perceptions of Indiana. The panel was followed up by small focus groups in key geographic markets and included participants who had and had not been to Indiana or been exposed to Indiana's visitor advertising and promotional material as well as those who would and would not consider relocating for work. This study uncovered key information that supported stakeholders' desire for messaging to improve the State's brand and investment in new assets. The Image Study and subsequent focus groups confirmed that Indiana lacks overall awareness – knowledge of the state and its assets was very low. However, the positive side of that lack of knowledge was that the perception was not negative, it just wasn't there at all. This is a better starting point for a brand message development and campaign rollout to drive awareness.

The Image Study also revealed the need for consistency in messaging and commitment to frequency. Of those who had been previously exposed to the visitor marketing material compared to those who had not, there is a 22-point average differential in their perception of Indiana being a good place to live, work, start a career or business, etc. When combined with those who had been exposed to the state's visitor advertising and had visited to those who had not been exposed to marketing material and had not visited that point differential in positive perception was compounded to an average of 33.5 points. This means that a consistent brand message that will improve perception and influence a visit will ultimately cause someone to see Indiana as a valuable place for their personal economic growth.

This research process also included studying the landscape of assets and amenities across the state. In total, the assets inventoried reached over 400 points of interest. The assets considered were initially provided by Visit Indiana and fell into the following primary categories: Outdoor Recreation, Museums, Attractions, Entertainment, Amusement Parks, Breweries, Wineries and Distilleries, Golf Courses, Trails, Zoos, Agritourism, and Music, Art and Theater. The assets and amenities were placed on the Attractor Scale (see appendix) to determine if the asset was a quality of life amenity or an attraction that causes a visit. This process determined that across the state there are 17 leading attractors that cause a national-level visit on their own, which include assets like the Indianapolis Motor Speedway, The Studebaker Museum, Indiana Dunes National Park, Indiana Basketball Hall of Fame, French Lick Winery and several others. There are another 133 assets that are of a caliber to cause a regional visit.

The remaining assets fall in the quality of life amenities that support daily livability and make Indiana a great place for relocating, raising a family and enjoying a balanced lifestyle. The focus groups and Image Study panel reinforced the need for both of these kinds of assets; attractors that drive visitors and their spending into the state and amenities that make living in the state on a daily basis enjoyable.

With the combination of research layered together, the IDDC has a level of intel to position current assets to target audiences whether it be a visitor audience, prospective relocating talent or soon-to-be graduates considering job opportunities with the employers in Indiana. The IDDC will need to continue to leverage this information as the recommendations of this plan are implemented in 2021 and beyond.

The appendix of this report contains all of the research completed in support of this Plan.

## IDDC Strategic Plan Priority: Improve Indiana's Brand Image & Perception

### **Strategic Direction**

Every state has a brand. It is that compilation of beliefs and opinions that form the collective judgment, both internal and external, about a state's geography, industry, people, culture, attributes and attitudes. Every state brand consists of a mix of both positives and negatives, strengths and weaknesses, all measured against the values of those passing judgment. The brand image of Texas is very different from that of Vermont or California, each with its perceived strengths and weaknesses and individual attributes.

The research conducted across the state on behalf of the IDDC, including listening sessions, a stakeholder survey and focus groups, identified that stakeholders felt Indiana lacked a strong brand awareness and that IDDC's number one priority should be to improve the brand perception. Stakeholders across the fields of tourism and hospitality, economic development and government were unified on this message of wanting to improve the State of Indiana's brand perception in order to support the overall message of attraction. A unified, supported brand platform will be catalytic in unifying key stakeholders and supporting IDDC's success with the key priorities identified in this plan.

### **Recommendation**

The recommendation of the IDDC Strategic Plan is to perform a research-based, inclusive review of the Indiana brand and develop a brand platform which produces the most effective messaging for the state and its people. It is important that this platform be developed with diversity and inclusion in all aspects of who and what the state represents. This is important for many reasons, one of which is also to demonstrate how much the state has changed and will continue to evolve.

A strong state brand attracts businesses, talent, students, and visitors and changes perceptions about the vibrancy and livability of both the state and its individual communities. This brand will need to reflect and project the state's diversity as well as seek to improve the notion of welcoming. The IDDC will seek input, participation, and support from the state's corporations, universities, attractions, foundations as well as local business and tourism organizations to help build the direction of the organization.

People want to relocate and live in a place that has a high quality of life, with great restaurants, outdoor adventures and a thriving community environment. Indiana has all that and much more. As Hoosiers, we know we have an incredible

story to tell, but we need to be much more intentional about sharing it with the rest of the country and the world.

The goal of the messaging is not to create a brand for Indiana -- that already exists. The goal of the project is, through research and stakeholder input, to discover the essence of the Indiana brand – what makes Indiana the special place that it is – and create messaging that promotes the real Indiana in the most authentic and compelling manner. Further, this project will bring together key government, corporate, university, and non-profit leaders, as well as Indiana residents, in common purpose to provide positive and consistent brand messaging about the state and a platform for connectivity. It will unleash Hoosier pride across the state, making every citizen a brand ambassador for the state's advancement. The brand will also create linkages with IDDC's goal of attraction across all areas of talent, student retention and visitors.

Strong corporate brands – Disney, Nike, BMW – understand the values that drive their enterprises and communicate those values in all external communication. Indiana needs a stronger, embraced, state brand message. A survey of state brands completed by 21,000 people in 16 countries back in 2006 placed Indiana as #42 of the 50 states in brand strength. In that survey, California was rated the strongest U.S. state brand, followed by Florida, Hawaii, New York and Washington.

A stronger, more consistent brand message for Indiana will help the state succeed in every arena. Whether it's attracting new businesses or new visitors, helping Indiana companies acquire new talent or the state's universities winning the competition for the best students, a stronger brand message for Indiana will help tip the scale for the state and her people. It will raise Indiana's profile nationally and internationally. And it will inspire the expression of the justifiable pride Hoosiers have for their state.

The additional component of a successful brand effort is the ability to demonstrate the “return” to partners that will benefit from the brand lift. This will further solidify the IDDC's value add to partners in crafting the brand platform so that they continue to participate and ultimately invest in the IDDC's programs going forward. The Indiana brand messaging will not replace regional and local brands, rather it will provide an umbrella brand which will compliment regional and local branding initiatives.

The IDDC will work with a new marketing partner to develop brand positioning for the State of Indiana. This marketing partner will incorporate the messaging and tactics such as the Hoosiers by Choice videos, Boomerang Hoosiers videos and InGenuity campaign to create a comprehensive positioning for the state.

## **Potential Partners for Collaboration**

Based on the above recommendation, the IDDC will look to collaborate with organizations and industry associations to leverage expertise and network for implementation. These include:

- State agencies
- Corporate community
- Regional economic development entities
- Local and regional Destination Marketing Organizations (DMOs)
- Higher education institutions
- State associations

## **Milestone Action Items**

Based on the above recommendation, the IDDC will take the following actions:

### *Short-Term*

1. Create a marketing RFP for tourism and talent attraction which will include new brand positioning for the state of Indiana.
2. Retain a qualified Indiana marketing firm via RFP.
3. Execute an inclusive, research-based marketing strategy for tourism attraction and conversion and talent attraction with the selected firm.
4. Share brand positioning and messaging results with internal (state) and external (private sector) stakeholders to garner their support and brand adoption.

### *Medium to Long-Term*

5. Create a messaging and brand implementation plan for the State of Indiana.
6. Develop a partnership/engagement program to encourage brand adoption and investment by government, corporate, academic, non-profit and foundation partners.
7. Ensure positioning of the messaging with the Foundation Board in all fundraising campaign efforts.

## **Resources for Implementation**

The initial items in the short-term to distribute the RFP, select and engage the firm, develop the marketing plan for tourism and talent attraction and share the results with stakeholders are all budgeted for completion within the IDDC's FY21 budget. Beyond the selection and development of new messaging and positioning, all rollout and implementation including marketing to internal, in-state stakeholders for adoption as well as marketing to target markets of talent, graduates and visitors will require additional budgetary resources from both public and private partners.

In the long-term the resources will need to increase exponentially in order to successfully market the state with the new messaging platform. This should include additional allocation from the general fund. Additionally, this is specifically an area where the Foundation can and should be involved in a fundraising effort to solicit corporate partners to support implementation of the brand platform.

Annually a business/marketing plan should be developed to account for implementation tactics related to this priority and the milestone action items.

## IDDC Strategic Plan Priority: Attract and Retain Talent

### **Strategic Direction**

Based on research conducted on behalf of the IDDC, stakeholders identified the existing challenge of talent recruitment. Interviews with top recruiters indicated that Indiana's top employers, headquarter companies and emerging sectors have struggled to recruit top talent. This is tied to several factors, one of which is the brand perception as well as improving the product offerings, both of which are also priorities of this Strategic Plan. It is important to note that product offerings and the positioning of the product can and will shift for different target markets.

When it comes to talent attraction the important product will be slanted towards the quality-of-life assets in the state i.e. outdoor recreation, trails, dining, farms and orchards, children's experiences and assets positioned for families. Each market that employers are targeting for talent attraction will have different priorities for quality-of-life and the IDDC will have the ability to position the respective assets and amenities against those priorities. The research team applied an industry tested rating scale to rate statewide assets. Some assets show up on the Attractor Scale as quality-of-life amenities and enhancements for local and regional experiences. The visitor-driving assets and attractors may not be as valuable on a day-to-day basis when considering relocation but are still highly valuable as desirable visible attractors that may help spur initial interest or create a broader appeal from an applicant. The quality-of-life assets will be more important in the prospective talents decision-making and should be positioned as such.

Additionally, research results from the Image study completed in 2020 showed that when asked about the likelihood of relocating for work, those who had been exposed to Indiana visitor marketing and promotions and who had previously visited had a significantly higher response to Indiana. This indicates that the halo effect of visitation positively impacts economic development prospects for the state.

With this in mind, the goal of this priority is to increase the competitiveness of the state when it comes to recruiting talent. As mentioned above, this will be achieved through a multi-pronged approach in parallel with the messaging and brand and product priorities, but this specific priority of attracting talent also has actionable items for the IDDC to take in order to move the needle for talent attraction on its own.

### **Recommendation**

The recommendation of the Strategic Plan is to develop tools, resources and a support plan to engage with recruiters looking to attract more quality talent into the state. This recommendation positions the IDDC as a resource for the

companies and recruiters working to fill open positions and provide them with tools and targeted content to better showcase Indiana's offerings and appeal to prospective candidates. This will also require emphasis on helping to create and promote quality of place assets, which is a parallel priority in the Destination Development section through connecting communities to grants and consultants to improve things like walkability, downtown development, pocket parks, gateway entrances, art/culture, etc.

### **Potential Partners for Collaboration**

Based on the above recommendation, the IDDC will look to collaborate with organizations and industry associations to leverage expertise and network for implementation. Partners will include:

- Statewide organizations in various employment sectors
- Talent recruiting agencies
- Larger employers
- Small business associations
- Regional industry associations

### **Milestone Action Items**

Based on the above recommendation, the IDDC will take the following actions:

#### *Short-Term*

1. Develop a database of top recruiters and headhunters working for and with Indiana based companies
2. Determine location and platform for resources and tools to live for recruiter-side access. This may be part of an overarching determination on the usability of the existing IDDC website. Further build out may be required or a new site may be determined to be more valuable.
3. Create a recruiter council that will act as a resource to the Board managed on a quarterly and ad hoc basis by IDDC staff for prioritized engagement and feedback on the tools. The initiative in the short-term is to establish the council and gain commitment from initial participants. The ongoing engagement, scheduling and management will be a longer-term initiative.
4. Finalize map tool for recruiter-side use to create a dynamic and more engaging way for recruiters to talk to prospective hires about the quality of life and value of things to do when they relocate to Indiana.
5. Publish recruiter-side map tool on IDDC platform.
6. Create additional targeted content resource tools for recruiters to engage with including the "Hoosiers by Choice" material as an initial resource.
7. Develop survey tool to determine pain points and what is working for recruiters.

8. Build out and promote the social media channels that promote and share Indiana's quality of life to help with talent attraction.

*Medium to Long-Term*

9. Develop package of testimonials for recruiters to leverage.
10. Establish recruiter council quarterly engagement schedule and work plan.
11. Test quality of life product development ideas i.e., new and enhanced trail systems, outdoor recreation opportunities, etc. with recruiters and prospective talent.
12. Leverage messaging campaign and marketing materials to target markets for talent recruitment.
13. Launch annual survey process to gain broad based insight on recruiter sentiment.

**Resources for Implementation**

The majority of the action items mentioned above can be initially completed within the confines of the IDDC budget. In future fiscal years additional fundraising will be important to increase the level of engagement and technology that can be deployed. A specific example is the development of a new online platform and website which can be a bigger ticket item and investment. The majority of these items are implemented through human resource and the team at IDDC. While it is understood today that the budget constraints due to COVID-19's impact on the overall economy will affect staffing levels in the immediate term, these items that can be implemented leveraging existing human resource within IDDC should be completed to kick off implementation.

Annually a business/marketing plan should be developed to account for implementation tactics and goals related to this priority and the milestone action items.

## IDDC Strategic Plan Priority: Retain Indiana Graduates

### **Strategic Direction**

Based on research from the listening sessions, Image Study and TravelUSA data, it became clear that Indiana was well known for its quality higher education institutions, but that those who came into the state for school often left to pursue job opportunities outside the State of Indiana. Additionally, in-state students who grew up in Indiana and pursued higher education in the state left the state as well when it came to opportunities for employment. Mitigating the “brain drain” effect has challenges related both to perception of the State of Indiana as well as the tangible challenge of connecting those soon-to-be graduates with desirable job opportunities to keep them in the state. Because this challenge was identified, it has become a priority for the IDDC to address and take on as part of its mission to retain Indiana graduates in the state for employment.

### **Recommendation**

The recommendation of the IDDC Strategic Plan is to develop tools and resources to further connect the corporate community and the higher education systems in order to keep Indiana graduates in Indiana. This recommendation positions the IDDC as a conduit between the employers and the higher education institutions who interface directly with students and the recruiters who could and should be soliciting them for job opportunities within the State of Indiana.

IDDC should also develop dynamic accessible content that is designed to impact the student population and educate them on the benefits and opportunities associated with actively seeking employment and staying in the state. While a student may have spent four years achieving a college degree, it is clear that there is a need to broaden their understanding of the value of remaining in Indiana for employment and becoming a resident of Indiana.

### **Potential Partners for Collaboration**

Based on the above recommendation, the IDDC will look to collaborate with organizations and industry associations to leverage expertise and network for implementation. Examples of these include:

- Higher ed institution's career centers
- ASCEND
- Department of workforce development
- Large corporations already invested in this effort
- Indiana Chamber of Commerce
- Regional Chambers of Commerce
- Industry young professional networks

- Student affairs representatives, student government leadership or student trustees at public institutions

### **Milestone Action Items**

Based on the above recommendation, the IDDC will take the following actions:

#### *Short-Term*

1. Leverage existing tools and existing intern programs by creating a consolidated location or directory as a resource for prospective interns at higher education institutions to use as a jumping off point.
2. Create tool kit to connect corporate recruiters and higher ed institutions with resources for both the corporate recruiter and the education platforms to leverage with the student population
3. Develop tools to be included in the kit, i.e. asset map, collateral material, messaging that is developed for Indiana college students. This will include determining specific messaging for different constituents within the student population.
4. Develop annual plan to reaffirm ROI and encourage top employers to participate at existing key job fairs based on location, specialty, etc. as it was discovered that many prominent companies are not attending the in-state school fairs and spending time and resource recruiting out of state students. Ensuring that top employers participate will help mitigate “brain drain” and showcase the talent the state is producing.
5. Create a Council that combines higher education and corporate recruiter representatives to further the connection points and guide where the IDDC places its resources in the long-term for this effort.

#### *Medium to Long-Term*

6. Develop a post-graduation incentive for students to commit to staying in state i.e. loan payoffs or property tax credits for buying property etc. Indiana might consider allowing total payment on student loans deductible from Indiana income tax.
7. Consider development of “showcase” internship program where IDDC plays a role in elevating the job positions available statewide. This showcase could include a competition that the IDDC facilitates or a video production to document the internship to raise awareness. The video production could be produced by another school program.
8. Develop messaging plan to reach a broader audience through high school education systems.
9. Develop and support participation in statewide tours to encourage students to get off campus and explore the entire state. This could include tours of cutting-edge industries and exposure to key leadership.
10. Create a template for student accessible customized link or microsite branded by the higher education partners that can be populated with

IDDC content with info on services, attractions, restaurants, resources, companies and organizations in the area that would be of interest to a student - a “things to do” along with a special pass or discount.

### **Resources for Implementation**

The majority of the action items mentioned above can be completed within the confines of the IDDC budget in future fiscal years and would not necessarily require additional fundraising. The primary exceptions in the short-term would be funding a video production to document internships and any new collateral material that goes into the kit, especially if printed, will require budget planning. In addition the ability to materially drive the awareness in the college and high school student population will take additional resources. In the long-term the exceptions would be the potential for post-graduation incentives. Those would require significant additional funds. Increased resources would also support the ability to reach a higher percentage of students through the connection points at the higher education institutions with more frequent content.

The majority of these items are implemented through human resource and the team at IDDC. While it is understood today that the budget constraints due to COVID-19's impact on the overall economy will affect staffing levels in the immediate term, these items that can be implemented leveraging existing human resource within IDDC should be completed to kick off implementation.

Annually a business/marketing plan should be developed to account for implementation tactics and develop goals related to this priority and the milestone action items.

## IDDC Strategic Plan Priority: Attract and Convert Visitors

### **Strategic Direction**

State tourism promotion efforts produce a positive return on investment (ROI) for state treasuries. Specifically, the visitors attracted to a state by its tourism advertising typically pay more in state taxes (predominantly sales tax) than the campaigns cost. This produces net revenue for state and local governments.

But the impact of visitor marketing goes far beyond the financial gains they provide to leisure-related businesses and state and local coffers. As Longwoods International's Halo Effect research has demonstrated consistently in recent years, visitor promotion and the resulting arrival of visitors improves the image of a destination for both living and economic development. Specifically, consumers who are exposed to a visitor marketing message and/or visit a destination have a much better impression of that destination not only as a place to visit, but also a place to start a business, advance their career, buy a second home or retire. In essence, the state's visitor promotion effort serves as the brand marketing effort for the state for every purpose. This strategy recognizes that a visit is "the first date" in a consumer's relationship with a destination, a relationship that can blossom into a more permanent "live-in" arrangement.

While the Halo Effect of visitor marketing and visitation on economic development is a natural, positive benefit of marketing efforts, the IDDC will take a more deliberate approach to harness the power of these forces. Specifically, Indiana's visitor marketing efforts will include a new objective: to prioritize visitor promotion messaging to target markets, be they geographic or demographic, which also demonstrate significant potential to convert from visitor to employer, employee, second-home owner or retiree.

It is expected that some target markets will have significant potential for both visitation and conversion to employment, while others will be stronger prospects for visitation and conversion to residents. Indiana's marketing efforts will prioritize potential markets and utilize research-driven tactics appropriate for each potential target market.

This new strategy for visitation and conversion of visitors will foster an unprecedented level of cooperation between destination marketing organizations across Indiana and their economic development counterparts. In many cases, for the first time they will be working together to attract the same "leads" to the state, to accomplish both visitation and economic development objectives.

### **Recommendation**

The recommendation of the IDDC Strategic Plan is to design its visitor promotion effort to be targeted to both attract the maximum number of visitor dollars into Indiana's economy and to accelerate the conversion of visitors to relocating business owners, high-value employees, second home owners, residents and retirees. However, the ability to convert visitors into new residents begins with the visit in this case, and therefore the importance of consistent and targeted visitor marketing will be critically important. This targeted effort will utilize Indiana's improved brand messaging, which is also an IDDC Strategic Plan Priority. Consistent communication and messaging will be critically important. The knowledge gap between those who have been exposed to prior visitor messaging and those who have not is significant, as proven by the Image Study research. This reinforces the need to close that gap through consistent promotional messaging to cause increased visits which ultimately brings positive spending and economic impact into the state.

Within this priority, it is also recommended that target markets across all aspects of IDDC's mission of attraction be aligned to increase the likelihood of conversion. Finally, this effort will reinforce the value of "Hoosier Hospitality" to the state's economic well-being and increase Hoosier pride, pride in both the state and local communities as desirable places to live, work and play.

### **Potential Partners for Collaboration**

Based on the above recommendation, the IDDC will look to collaborate with organizations and industry associations to leverage expertise and network for implementation: examples of these include

- Local and regional DMOs
- Hospitality associations
- Restaurant association
- Transportation and transit authorities
- Real estate associations
- Indiana Tourism Association

### **Milestone Action Items**

Based on the above recommendation, the IDDC will take the following actions:

#### *Short-Term*

1. Analyze current visitor promotion efforts for effectiveness and return on investment against visitor conversion.
2. Research potential of current visitor target markets and new visitor target markets that are also targets for conversion to become Indiana employers, employees, second-home owners and retirees.
3. Create a brand marketing plan which will attract visitors, support talent recruitment and stimulate conversion from visitor to resident.
4. Engage with regional DMOs to develop alignment with the approach to target markets that have potential for broader attractions.

5. Develop approach to support Hoosier Pride within the marketing efforts.

*Medium to Long-Term*

6. Secure additional funding for the Indiana messaging and brand marketing plan for full rollout.
7. Develop a targeted (as stated above) co-op advertising program to generate private-sector dollars for the Indiana attraction marketing campaign, from both visitor-focused entities and economic development partners.

**Resources for Implementation**

There are two key resources in finalizing the direction related to converting visitors. The first is the data that is surfaced from the research that has been conducted. This will help inform which markets should be targeted. As this research has already been completed or is being completed through FY21, the short-term items can be implemented using in-house staff at IDDC, with the exception of the brand marketing plan which should be assembled in coordination with the overall messaging campaign. The current resources that are available are insufficient to successfully support the messaging campaign and raise interest in private funding participation.

The other resource is the capacity to launch a plan to meet with current asset owners throughout the state to review the attractor scale geared towards attracting new and additional visitors to the state. This too should begin implementation with existing staff and resources however the long-term will be enhanced through increased budget. The ability to successfully market, reach, convert and track visitation will require new budget dollars for the IDDC.

## IDDC Strategic Plan Priority: Formulate Destination Asset Development Strategy

### **Strategic Direction**

The research conducted across the State of Indiana to identify, assess and rate the existing assets, amenities and attractions highlighted that there is an opportunity to create and invest in new compelling visitor attractors. These attractors are positioned to draw visitors and capture and increased share of visitor spending for Indiana as well as increase the quality of place for residents of communities across the state. In total, the assets inventoried reached over 400 points of interest. The assets considered fell into the following primary categories: Outdoor Recreation, Museums, Attractions, Entertainment, Amusement Parks, Breweries, Wineries and Distilleries, Golf Courses, Trails, Zoos, Agritourism, and Music, Art and Theater.

The Attractor Scale, a JLL assessment tool, which the IDDC will continue to utilize, ranks and scores primarily leisure driven visitor assets to determine what kinds of assets are the cause of a visit. The Attractor Scale scores assets on eight different criteria to determine how much demand the asset will drive when it comes to visitor interest. The cumulative scores are then placed on the Attractor Scale to illustrate how many amenities exist today that drive an international level of visitation, national visitation, regional visitation or those that fall into the quality-of-life category but do not cause a trip on their own.

From the 400 assets inventoried it was determined that roughly 150 assets were the top priority that would be scored and placed on the Attractor Scale. The outcomes identified the State of Indiana has 17 leading national and regional attractors which include assets like the Indianapolis Motor Speedway, The Studebaker Museum, Indiana Dunes National Park, Indiana Basketball Hall of Fame, French Lick Winery and several others.

The majority of assets scored fell into the quality-of-life category and included amenities such as the Indianapolis Zoo, Fort Wayne Museum of Art, White River State Park, Blue Spring Caverns, Upland Brewing Company and many others.

All 400 assets were then mapped and placed across the State of Indiana to identify where the key assets fit in around the state and what other attractions and amenities were clustered together. In addition to these attractions and amenities, JLL worked with the IDDC to place the top companies and headquarters across the state into the same map. This further supports the IDDC's mission to understand what assets and amenities exist that help support quality of life and tell a story to multiple audiences when it comes to attracting people to

the State of Indiana whether they be travelers, students and workers, or companies.

In addition to the Attractor Scale results, a separate and specific focus should consider the marquee youth sports venues as that market segment continues to become increasingly competitive nationwide.

### **Recommendation**

The recommendation of the Strategic Plan is to create a strategy to inspire investment in new and enhance current visitor attractors and quality of place assets. This recommendation to develop a plan and path to reach investors and developers in both the public and private sector to solicit and advocate for the desired investments. These assets and investments should reflect the diversity of the state as well as plan for new assets that will be valuable to a diverse audience in the future as the population evolves and grows. A long-term goal of the Strategic Plan for the IDDC is to ultimately be the, or one of the, primary funding and advocacy entities for these investments via competitive grants or RFP processes. The assessment tool creates a common platform to review findings with current assets owners and operators and develop investment strategies.

### **Potential Partners for Collaboration**

Based on the above recommendation, the IDDC will look to collaborate with organizations and industry associations to leverage expertise and network for implementation. These will include:

- Developer networks
- Chambers (local and regional and state level)
- Indiana Tourism Association
- Regional economic development authorities
- 21st Century Talent Regions
- State agencies
- Indiana Finance Authority
- Legislators to consider tax credits for future projects

### **Milestone Action Items**

Based on the above recommendation, the IDDC will take the following actions:

#### *Short-Term*

1. Launch destination map.
2. Implement criteria for scoring assets and amenities (see appendix).
3. Utilize attractor scale to further validate gaps in the destination product.
4. Work with local DMOs and other organizations to surface and confirm assets represented at the state level. Also work with local DMOs to understand criteria for scoring. This will reinforce the scale's value at the local level and ensure stakeholders are using the same "lens" to consider

- new visitor-facing attractors vs. those positioned to enhance quality of life.
5. Study comparable statewide development and investment programs to create a program that is best for Indiana.
  6. Evaluate marquee youth sports venues as that market segment continues to become increasingly competitive nationwide and the attractive product may need to enhance or evolve.
  7. Create a council from the developer community to gain insight and feedback as to what programs are most appealing to them.
  8. Work with regional economic development groups to leverage existing investment programs (i.e. incentive, matching funds, community foundation grants, etc.).
  9. Identify additional public funding sources within the state.
  10. Create a communication plan to raise awareness and engagement with the assessment tool.

#### *Medium to Long-Term*

11. Develop an approach to funding projects centered around two categories of "Attractors" and quality of life amenities utilizing the attractor scale criteria.
12. Set targets for annual number of projects reviewed and endorsed for funding awards in each category of visitor Attractors that will drive awareness, convert new visitors, capture spending and enhance the profile of Indiana versus those assets that will enhance the overall quality of life and support the ability to recruit new talent and retain students as new residents of Indiana.
13. Secure positioning for IDDC to receive increased budget dollars to be one of the primary entities to assess and fund projects.
14. Develop standard operating procedures for fund management and develop annual funding cycle and supporting plan.

#### **Resources for Implementation**

The majority of the action items mentioned above can be completed within the confines of the IDDC budget in future fiscal years and would need to be built into annual work plans for departmental staff to take on portions of implementation i.e., working with local DMOs and managing the developer council.

In the long-term the resources will need to increase exponentially in order to fund, in full or in part, new projects across the state. Those would require significant additional funds.

While it is understood today that the budget constraints due to COVID-19's impact on the overall economy will affect staffing levels in the immediate term,

these items that can be implemented leveraging existing human resource within IDDC should be completed to kick off implementation.

Annually, a business/marketing plan should be developed to account for implementation tactics related to this priority and the milestone action items.

## IDDC Strategic Plan: Funding Approach

The ability for IDDC to raise funds in addition to public funds is paramount to achieving the priorities set forth above. The importance of the funds is not only in the need for additional resources, but the funding signifies deeper participation and engagement with key partners. The following are key components of a successful fundraising plan.

### 1. Establish Potential Funding Partners

There are many potential funding partners for the IDDC. In general, they fall into the following categories:

- State of Indiana general fund allocation
- Corporations
- Educational institutions
- Industry associations
- Developers
- Real estate industry
- Regional planning and promotional organizations/DMO's
- Foundations – granting agencies
- Private donors/philanthropists (Legacy programs in honor of individuals or families)

For each of the funding partners, the IDDC Foundation will enhance current databases and coordinate discussions to gain additional insight on their priorities and how IDDC can support their success.

### 2. Develop Value Propositions for Targeted Funders

For the most part, the fundraising plan will be predicated on determining how IDDC can add value for potential funding partners. With all of the current economic pressure on the private and public sector, the notion of raising money through funders wanting to be good “community” partners will not be successful. IDDC must show the value of engagement.

The first phase of the fund-raising process is to develop “value propositions” for the target categories noted above. The goal of this phase is to develop “value” by aligning IDDC’s approach with targeted partner and producing metrics regularly to demonstrate accountability. It is recommended that there are value propositions developed for each target funding party by priority, when applicable.

The following is a sample table to illustrate the approach related to what aspects of the IDDC’s priorities will add value to prospective funding partners.

	Talent Recruitment	Graduate Retention	Visitor Conversion	Brand Development	Destination Development
<b>State of Indiana</b>	X	X	X	X	X
<b>Corporate Entities</b>	X			X	X
<b>Education Systems</b>		X		X	
<b>Industry Assoc.</b>	X			X	
<b>Developer Community</b>	X			X	X
<b>Real Estate Industry</b>	X	X	X	X	
<b>Regional Tourism Agencies/ DMOs</b>			X	X	X
<b>Foundations/ Granting Agencies</b>	X	X	X		
<b>Private Donors</b>	X	X		X	

*Sample Value Propositions and Investment Priorities.*

The following are sample value propositions and the value of investment designed to demonstrate how all aspects of each priority should be reviewed in conjunction with fundraising opportunities.

1. Talent Recruitment

- a. IDDC has developed tools and other resources to enhance corporate recruiters' ability to attract talent into the state of Indiana. The tools are designed to provide targeted information based on the demographic of the recruit as well as specific interests. The goal is to increase the talent recruiter's effectiveness and therefore increase their conversion of quality talent.

If IDDC receives increased resources from funding partners in this area, it will be able to expand the technological capabilities and therefore effectiveness of the tools. IDDC will be measuring the impact and usage of the tools and developing goals based on the number of actual successful recruitments, where the IDDC tools were utilized.

2. Student Retention

- a. IDDC is developing a kit and communication plan to raise awareness of current state university students of both career opportunities and aspects of staying in Indiana that they may not be aware of. IDDC is collecting data from state universities on the current retention rate of Indiana college graduates with a goal of increasing this over the next five years.

Increased resource in this area will expand IDDC's ability to impact by raising awareness with more students. This initiative will be measured by an increase in student retention.

3. Visitor Attraction and Conversion and Contribution to Talent Recruitment and Relocation
  - a. IDDC is evolving the visitor strategy to focus on markets and geographies that have been identified from the research as having potential both in talent and visitor attraction. The visitor marketing efforts are centered around experiences that are attractive to specific audiences with vehicles to track the return on these efforts. IDDC will collaborate with the real estate industry to gain intelligence on the impact of a visit to Indiana as a first step in relocation.

Increased resources in this area will increase the frequency and reach in driving visitation that has the longer-term potential of increasing relocation.

### **Role of the Foundation Board - Governance**

The Foundation Board will oversee the efforts related to fundraising as the governing body for the entity that will receive the funds. The Board will ensure that the identified focus of secured funds is carried out by the IDDC. The Foundation Board will give input in the development of the value propositions as well as identifying potential targets in the key categories. There may also be opportunities for Foundation Board members to be part of the requests for partner support and financial commitments based on existing relationships or areas of expertise.

### **Establishment of Fundraising Goals**

The establishment of fundraising goals should be driven by the value propositions, potential impact and potential targets associated with the key priorities. Once each priority is further developed and the value propositions are validated, the fundraising efforts or “asks” can begin.

The talent recruitment priority may have the highest fundraising potential. This priority has a broad base of stakeholders, who will be positively impacted by successful implementation. When IDDC can demonstrate that the organization has increased recruiting efficiency and quality, the fundraising efforts should be successful.

Each priority will have targeted partners, a clear value proposition(s) and an estimate of value to create the fundraising goals.

### **Strategic Plan Funding Opportunities - Concepts for Implementation**

Throughout the priorities sections the Plan identifies action items for implementation that may require outside funding sources beyond the IDDC existing budget (post COVID). To recap, the goal for securing partner funds is to enhance and accelerate implementation. Based on the recommendations and action items of each priority noted above, the following are further examples of items that would benefit from partner funds:

- Brand implementation – amplification of marketing messaging
- Web development and technology enhancements for further navigational functionality as a recruiter resource
- Supporting the development of video documentary for internal university programs to increase visibility and the attractiveness of staying in Indiana
- Student loan payment deductibility and other incentives for students committing to stay in state after graduation

### **Importance of the Branding Initiative in Fundraising**

The development of a Brand and the connectivity that is involved in a successful brand implementation effort is foundational in supporting the fundraising efforts. The engagement process in the brand development provides a platform to engage potential funding partners. In addition, efforts to drive brand engagement will also create an opportunity to communicate the value proposition from IDDC's priority implementation.

Appealing to and complimenting current efforts related to statewide pride is another outgrowth of effective brand development that will support the overall fundraising efforts.

### **Milestone Action Items**

The following are potential milestones for the fundraising plan implementation:

#### *Short-Term*

1. Development of a database of potential funders organized by industry.
2. Launch a communication/outreach plan to raise awareness and educate potential funders
3. Finalize the value propositions for each priority and key fundraising targets.
4. Finalize the funding goals for each priority
5. Launch fundraising efforts with engagement from the Foundation Board of Directors.

#### *Medium to Long-Term*

6. Grow funding levels annually to reach comparable state marketing levels from competing states i.e., Pure Michigan as benchmark example.

7. Target new ancillary industry partners that are now or will soon see/feel value from the IDDC messaging efforts that go beyond the core stakeholder audiences.
8. Continue to lobby the state for increased financial support to grow total budget capacity.

## IDDC Organizational Recommendations

The IDDC was formed by the State Legislature following a recommendation by the 2017 Tourism Task Force under Governor Holcomb as a quasi-governmental agency. The IDDC was an outgrowth of the Indiana Office of Tourism Development (IOTD). The evolution into the IDDC was effective July 1, 2020. The move to the IDDC at the state level ensures that there is a seamless viewpoint on the important areas of retaining and attracting talent to the state, keeping graduates from the state's higher education institutions here for work and continuing to drive new visitation to increase spending and ultimately convert visitors into new residents in the State of Indiana.

The IDDC has ambitious goals to achieve and will need continued budgetary resource and a strong team to realize results for the State of Indiana across the areas of the mission.

Organizationally, the IDDC reports up to a Board of Directors as well as to the Lt. Governor's office. The IDDC also has a separate Foundation focused on fundraising and partnership, as mentioned above. This Foundation also has a separate Board of Directors. This is important because of the distinction between the two Boards and how the IDDC staff will engage them in distinctly different ways as well as how they could collaborate in the future. Board(s) management will be critical to prepare material and bring back decision making opportunities for the Boards as they are both expected to be working Boards. This is important because of the role the Boards will play. This plan for example was built with their joint feedback in mind and each member then reviewed the draft before final approval. Guiding documents like this, fundraising strategies and opportunities and more will be brought before the Boards for decisions. IDDC leadership will need to dedicate time to engaging the Boards for their distinct purpose.

The IDDC's current organizational chart supported eight positions including the President & CEO at the time of this Plan. For an organization with such a significant role to play across the state, additional human resource may be required. For example, director-level positions over the three growth areas of talent, graduate retention and visitor conversion should be considered. At the time of this report, only the visitor focus had a director-level position overseeing the focus area as an outgrowth of the IOTD. Similar roles for talent retention and attraction and graduate retention should be considered as additions to the organizational chart. These positions would report directly to the President & CEO.

Additionally, a chief of staff position should be considered for the IDDC as the mission is broad and the reach is wide, the President & CEO will need to be freed up to spend time meeting with constituents at the state level, fundraising partners,

board engagements and more. A chief of staff would support the President & CEO while receiving report backs from the departmental directors. The chief of staff would also be integral in preparing for Board(s) meetings and interfacing with the staff on project management and implementation.

It is recommended that beyond this level of organizational direction, the IDDC leadership develop a phased organizational chart to support budget increases over the next three to five years. This can be done in the implementation phase of this plan in 2021.

All organizational enhancements and considerations should be done in accordance with budget. COVID-19 impacted the first fiscal year (2020-2021) and may have an impact on the near-term but will hopefully not hinder the organization from the state's support side beyond 2021.

## Conclusion

In summary, this is an exciting time for the IDDC and the State of Indiana. While there is much work to do, there is great opportunity to make strides in the short-term that will significantly benefit the State in the long-term. The goal of this Strategic Plan was to take the feedback from stakeholders and visitors alike and craft a path forward for the IDDC to measure and make progress against.

With this in mind, the IDDC will begin implementation in January 2021, the midpoint of the fiscal year for IDDC's inaugural year. This will provide opportunity for the IDDC to communicate to stakeholders the goals of the plan and the steps that the organization will take to implement.

Additionally, the timing will support a fundraising campaign, that in the midst of COVID-19's health emergency which caused an economic downturn, will be even more important. The need to be nimble, flexible and resourceful while continuing to keep the long-term vision in mind will be important.

Partners identified in this plan will be key for the IDDC's initial implementation to collaborate and leverage resources as well as to understand those partners' long-term goals for the future and align the work plan in support of those mutual partners.

The IDDC will take this plan forward and on an annual basis create a sales and marketing or business plan to implement in greater detail.

While this is a new initiative for a new organization, the goals and ideas have been part of Indiana's hospitality, visitor attraction and economic development sectors for many years. This is the culmination of those ideas from a galvanized stakeholder community represented in one new entity of the IDDC.

## Appendix

### Research Elements

- 50 state-level tourism structures
- Image Study
- Travel USA Study
- Focus Group Reports
- Stakeholder Survey Results
- Attractor Scale