

## TOURISM AND STATE MARKETING UPDATE—Q4 2021

Area of Travel	4th Qtr 2021	4th Qtr 2020	% Change 21-20			
<b>YEAR TO DATE TOTALS AVAILABLE IN THE ANNUAL REPORT</b>						
State Park Visitors	142,995	134,342	6%			
National Park Visitors	69,520	75,614	-8%			
Website Visits	454,459	307,414	48%			
Major Attractions	1,233,969	236,985	421%			
Local Visitor Centers	6,605	3,473	90%			
Cumulative Lodging Tax	\$1,698,290.59	\$1,057,652.47	61%			
ND Airport Deplanements	246,883	130,899	89%			
Canadian Border Crossing	39,287	11,263	249%			
Statewide Hotel Occupancy Rate						
October	54.0%	45.8%	17.9%			
November	45.4%	33.9%	33.9%			
December	39.8%	30.1%	32.2%			
Statewide ADR-Average Room Rate						
October	\$84.62	\$71.28	18.7%			
November	\$81.08	\$69.25	17.1%			
December	\$81.42	\$68.15	19.5%			
RevPAR				\$38.33	\$28.55	34.3%
Taxable Sales and Purchases						
				3rd Quarter 2021	3rd Quarter 2020	% Change
Arts, Entertainment & Recreation				\$50,734,747	\$38,500,575	31.78%
Accommodation & Food Services				\$512,213,642	\$420,848,546	21.71%

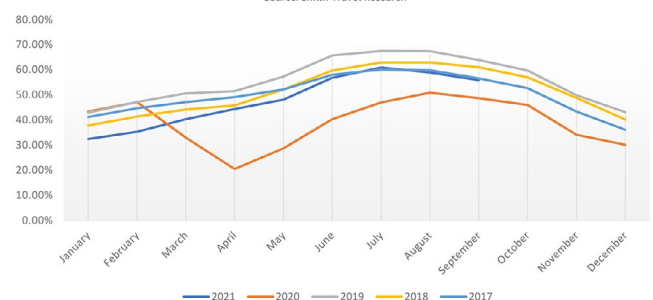
### Q4 STATEWIDE TOURISM UPDATES

- Land border entry reopened on Nov. 8. As a result, Q4 border crossings increased 248% over 2020. However, border crossings remained down 25.5% YOY. A loss of more than 2 million personal vehicle and bus passengers since the start of the pandemic and border closure, equals an approximate loss of \$275 million in Canadian visitor spending.
- Arrivalist verified 13,509,091 trips during 2021, this is 14.67% higher than 2020.
- Traditional inquiries fell by 64% primarily due to the success of a Midwest Living contest done last year.
- Theodore Roosevelt National Park visitation tracked 43.88% higher YOY. Colder temperatures in November and December meant lower visitation in Q4 YOY.
- Travel counselors at North Dakota Tourism handled 296 online chats during the quarter.
- The annual Tourism Industry Marketing Summit was hosted in Bismarck with more than 100 professionals attending.
- NDtourism.com had 454,459 site visitors during the quarter: a 47.8% increase over Q4 of 2020 and 214.92% higher than Q4 of 2019.
- Global Travel had two Brand USA shows, Travel Week London in person and one-to-one business meetings virtually along with individual tour operator meetings, resulting in 58 total meeting with international tour operators.
- Group Travel had development meetings with 35 tour companies, resulting in 33 scheduled trips for an estimated \$320,000+ in visitor spending.

TRADITIONAL INQUIRIES  
3,270 (↓64% YOY)

E-NEWS SIGN-UPS  
1,549 (↓79% YOY)

Monthly Statewide Hotel Occupancy (%)  
Source: Smith Travel Research



Hotel occupancy is up 47.7% YTD.

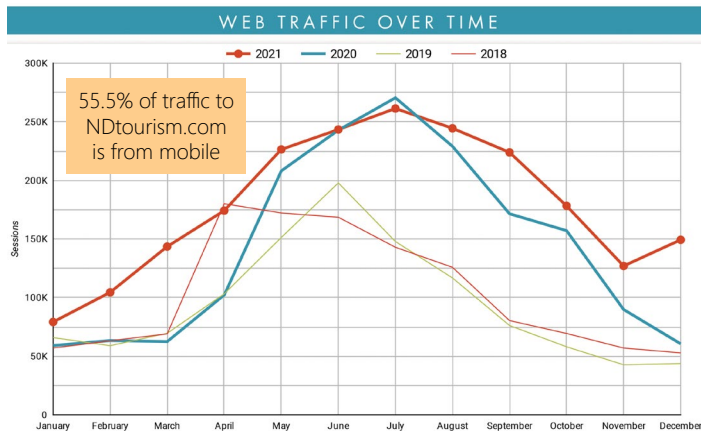
## Q4 TOURISM MARKETING EFFORTS

The mobilization of the additional \$6.5 million of CARES Act funding continued in Q4, allowing for expansion of existing campaigns into the winter months and to expand our marketing in the Chicago and Wisconsin markets, including a Green Bay Packers sponsorship that resulted in over 5.8 million impressions. The Denver market was also added utilizing the CARES Act dollars, to include digital, Hulu, social, email and Pinterest marketing.

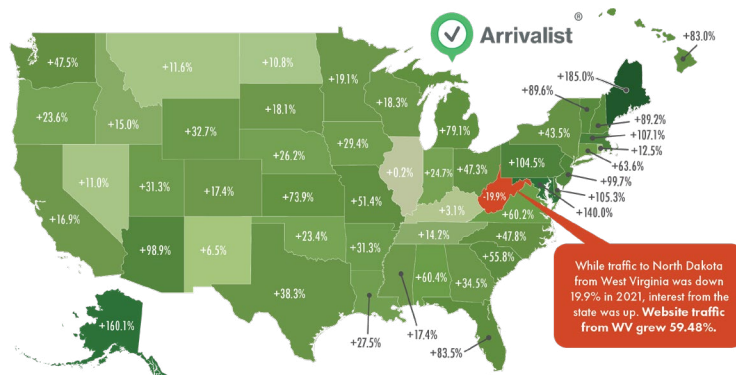
ND Tourism was also able to run a Canadian Welcome Back campaign in November and December, targeting the Winnipeg, Regina and Saskatoon markets and surrounding areas. A combination of broadcast television, radio, print, buses, and billboard advertising was utilized, resulting in 45,163,307 impressions.

Through Q4, advertising reached more than 263 million impressions, with over 120 million of those being attributed to the additional CARES Act dollars.

151 national media mentions reaching 621 million – up from 58 national media mentions reaching 159 million in 2020 due to additional CARES Act dollars to assist public relations efforts. Increase of 360%.



## NORTH DAKOTA SEES VISITATION INCREASES FROM SEVERAL STATES IN 2021



Arrivalist verified 16,725,823 U.S. road trips during 2021, this is 15.2% higher than 2020.

## TOURISM SOCIAL MEDIA

72,276 followers  
 39,862 followers  
 41,770 followers

An end of the year campaign using CARES Act dollars inspired potential travelers in new target areas to visit North Dakota in 2022. This push results in 5.5 million impressions and 6,000 visits to our website to learn more.

TOTAL VIDEO VIEWS  
593K

TOTAL IMPRESSIONS  
13.5M



Featured Content

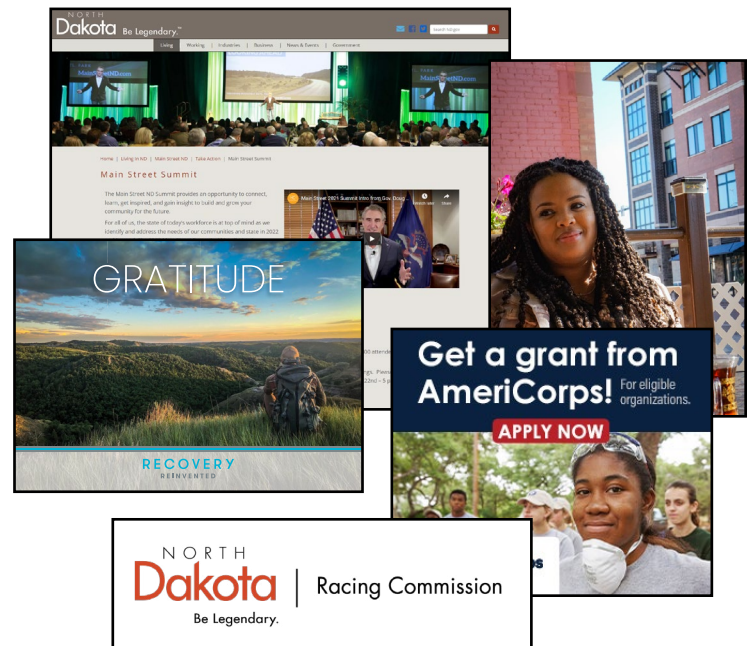




## STATE MARKETING AND COMMERCE UPDATE—Q4 2021

### COMMERCE AND STATE MARKETING PROJECT HIGHLIGHTS

- Recovery Reinvented postcards
- Main Street Summit marketing
- AmeriCorps Business recruitment campaign – paid Facebook marketing in 4th quarter resulted in over 1.1 million impressions and 5,085 engagements. Google display advertising resulted in over 1.6 million impressions and over 8,700 click-thrus to the AmeriCorps page. LinkedIn was also utilized, resulting in 92,478 impressions with 332 clicks.
- AmeriCorps Workshop Awareness Campaign
- Be Legendary logos/lockups for:
  - Council on the Arts
  - Atmospheric Resource Board
  - Racing Commission
  - Abstracter's Board of Examiners
- Marketing assistance consultations
  - Corrections — audio resources
  - Game & Fish — marketing options
  - Governor's Office — branding
  - Racing Commission — booth materials
  - Water Resources — emblems and brand compliance
  - Human Services — wordmark
  - Health & Human Services — lockup consultation
  - NDIT — website lockups
  - State Parks — photography consultation
- Photography co-op offered including requirement for new workforce related assets. Partners include Devils Lake, Minot, Jamestown, Turtle Mountain Band of Chippewa, and Williston.
- Overall media efforts garnered 190 media instances reaching more than 357 million readers/viewers
- Cultural Aspiration PowerPoint slides
- Small Business Saturday Campaign
- Created Be Legendary theme and instructions for Word and Excel
- Agri-Tourism signage mock-ups for joint project with Commerce, Ag Dept and various councils
- Social media presentation for Water Commission
- Governor's Photo Contest event and set up photo contest traveling exhibit
- Statewide Communications Network wordmark



### MEDIA PLACEMENTS

**Quality of place** – Nine national media mentions reaching 198 million – keeping pace with 9 media mentions in 2020 reaching 99 million.

**Business** – 128 national media mention reaching 285 million – 2020 had 62 mentions reaching 5 million. Fufeng and Cerilon GTL received majority of the business media coverage.

**Workforce** – 30 national media mentions reaching 191 million – up from 105 mentions reaching 73 million in 2020 (new jobs with Amazon in October).

### COMMERCE SOCIAL MEDIA

TOTAL IMPRESSIONS  
1.39M

TOTAL VIDEO VIEWS  
6,255