

2022 | ANNUAL REPORT



Aerial view of the Little Yellowstone Campground on Sheyenne River Valley National Scenic Byway.

NORTH
Dakota
Be Legendary.

Tourism & Marketing
COMMERCE

North Dakota Department of Commerce
Tourism and Marketing Division Report on
Marketing North Dakota and the Travel
and Tourism Industry

Dear Friends,

Throughout this report, you will find the results of our collective and collaborative work. While this report focuses primarily on tourism, the work to elevate the image of North Dakota is drawing eyes, suitcases, and resumes, and showcasing all the advantages our state offers for visitors and lifestyle.

Trimming down the data we included has not been easy. Our need to understand the results we are netting, and how we can provide value and a strong return on investment to you and all the citizens of North Dakota is a priority we take seriously.

Research shows our marketing drove 1.4 million new trips to North Dakota and dramatically elevated our state's image as a good place to live, start a career, start a business, attend college, buy a vacation home and retire. A 2022 study also confirms what may seem obvious; most people visit before they move. Of recent drivers who transferred their licenses to North Dakota, 76% had visited the state prior to moving.

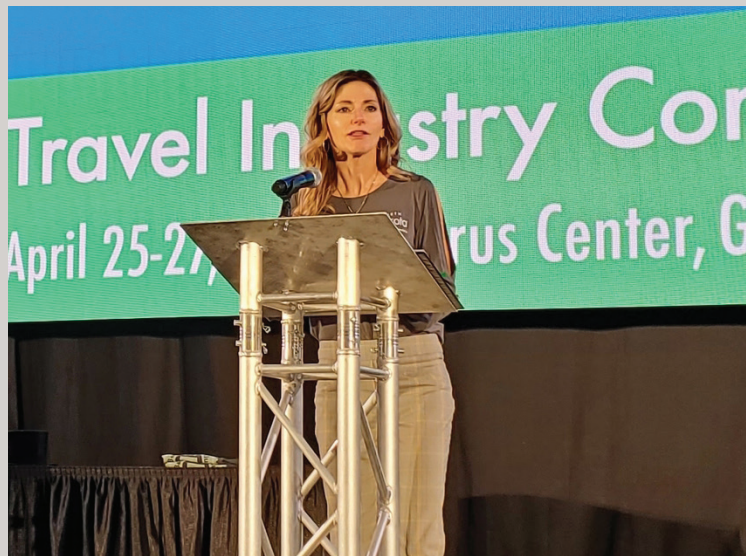
A 2022 national perception study assessing Americans' awareness of North Dakota, showed that perceptions of the state were modest and largely driven by a lack of familiarity. Only 22% had lived in or visited and the top words associated with North Dakota were cold, rural and remote. This may not seem like something you would want to include in a tourism annual report, but I believe it illustrates the importance of investing in marketing. We need to show people what North Dakota really is... and the most efficient way to accomplish that is through destination marketing.

In addition to marketing, our tourism operations team, which now includes a dedicated tourism business development manager, is focused on expanding and improving the offerings found statewide. Offerings that attract visitors, workforce and allow us all to enjoy life in North Dakota.

Thanks for your support and interest,



Sara Otte Coleman



Sara Otte Coleman presents at the 2022 Travel Industry Conference in Grand Forks.

76% of new residents visited North Dakota prior to moving to the state

Research

The Tourism & Marketing Division contracted three major studies in 2022 to gain insights into the national perception of the state, advertising effectiveness, and data to make market decisions for workforce recruitment.



47% FAMILIAR TO VERY FAMILIAR

NORTH DAKOTA CONTINUES TO BE AN UNFAMILIAR DESTINATION FOR MOST AMERICANS



\$34 RETURN ON INVESTMENT

EVERY \$1 INVESTED IN ADVERTISING GENERATED \$34 IN DIRECT VISITOR SPENDING AND \$3 IN TAX REVENUE



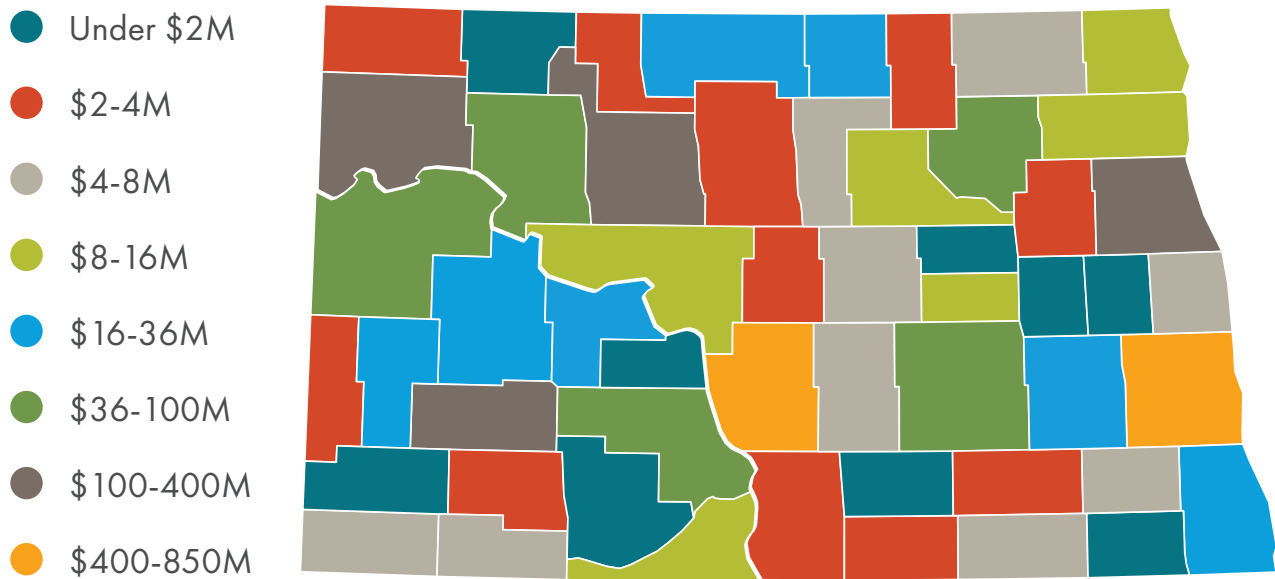
48% EMPLOYMENT MOTIVATED

A MAJORITY OF NORTH DAKOTA'S NEW RESIDENTS RELOCATED TO THE STATE BECAUSE OF WORK

TOURISM IMPACTS STATEWIDE

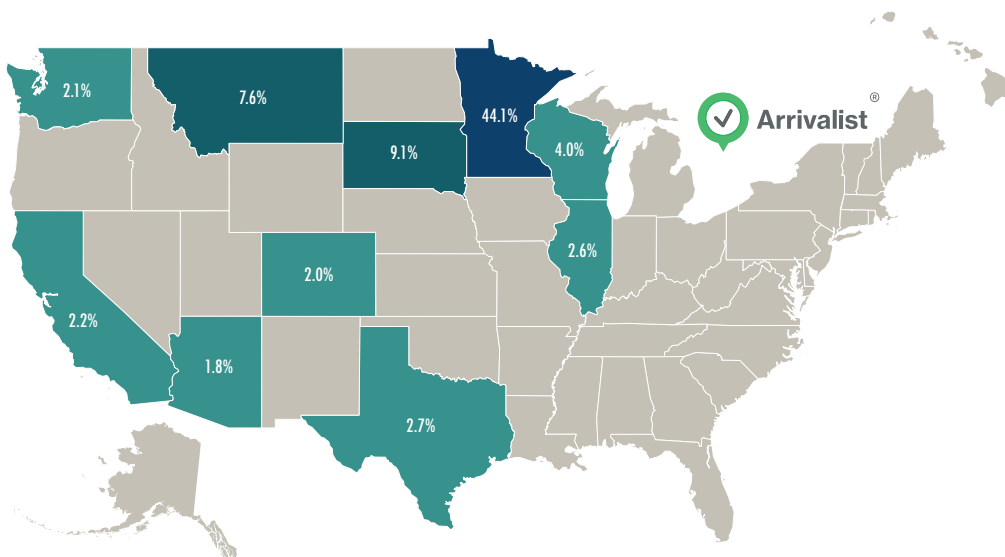
According to the 2021 Tourism Satellite Account, North Dakota counties had an average increase of 23.6% in visitor spending from 2020. Travel and tourism benefits every county in North Dakota, creating jobs, generating sales across dozens of sectors and improving your quality of life.

VISITOR SPENDING BY COUNTY



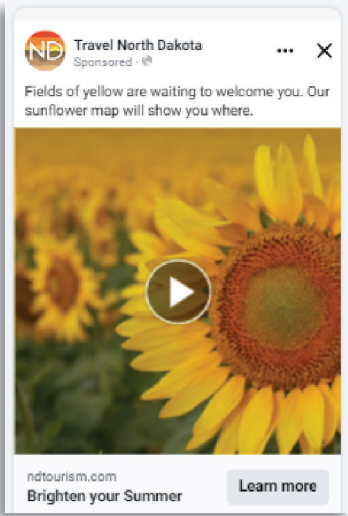
Top Origin States for Travel to North Dakota

North Dakota partners with Arrivalist, a geo-location intelligence company, for data on U.S. adult road trips to the state. Arrivalist sources information from mobile devices and GPS providers in order to report travel-specific data including a consumer's entire journey to, within and back from a destination.



NORTH DAKOTA TRAVEL INDUSTRY

North Dakota’s advertising presence in 2022 was significantly reduced following the unprecedented investment in 2021. As a result, ad reach declined in most mediums and markets, and year-over-year losses were seen in website traffic and traditional inquiries. Still, the 2022 campaign was one of the most efficient to date, based on video completions, arrival and stay lift measured by Arrivalist, and website conversions.



PRIMARY CAMPAIGN

The North Dakota Tourism advertising campaign’s **PRIMARY GOAL IS TO INCREASE AWARENESS OF THE STATE AS A TRAVEL DESTINATION, INCREASE QUALIFIED TRAFFIC TO THE WEBSITE, REFERRALS TO PARTNERS, AND PROVIDE THE TOP-OF-FUNNEL INSPIRATION TO ENCOURAGE A BOOKED TRIP TO NORTH DAKOTA.** Primary campaign advertising reaches the regional market including Minnesota, Wisconsin, Illinois, the Denver DMA, North Dakota, and Manitoba and Saskatchewan, Canada.

INTEND TO TRAVEL METRICS

TRAVEL GUIDE EBOOK

MONTHLY
USERS
1,000+
PAGEVIEWS
42,000+

TRADITIONAL
INQUIRIES

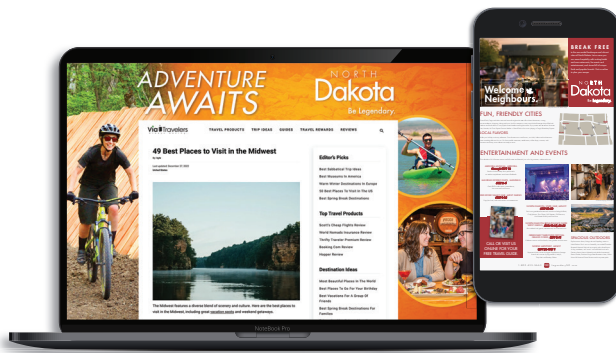
27,247
INQUIRES
1% decrease

WEBSITE TRAFFIC

USERS **1,942,019** 3.61% decrease
PAGEVIEWS **2,408,669** 6.01% decrease
SESSIONS **2,070,760** 3.91% decrease

NICHE CAMPAIGN

Fishing, hunting, golf, motorcycling and history are travel niches in which specialized marketing is expanded outside of near borders and into U.S. secondary markets including South Dakota, Montana, Nevada and Arizona.



CAMPAIGN RESULTS:

IMPRESSIONS
423 MILLION

VIDEO COMPLETIONS
15.22 MILLION

CONVERSIONS TO WEBSITE
250,000+

PAID SEARCH TRAFFIC
INCREASED 23.1%

TRAVEL GUIDES DISTRIBUTED
250,000+



REACH



TV/RADIO

184,242,890

A 8.8% reduction in reach due to smaller budget resulted in 11.9% fewer vanity URL conversions to website.



PRINT

12,412,638

Print reach was maintained from 2021 to 2022 and as a result, inquiries from magazines increased 18%.



OUT-OF-HOME

150,658,043

A 41% reduction in OOH impressions due to fewer placements.



DIGITAL

108,387,333

A 65.4% reduction in impressions, but most efficient digital campaign to date.



SOCIAL MEDIA

11,866,529

32% fewer social impressions led to a 13.6% decrease in social traffic to the website.

PUBLIC & MEDIA RELATIONS

Public and media relations efforts continued to elevate North Dakota's image through proactive outreach and storytelling garnering positive media coverage and increasing awareness.

2022 MEDIA COVERAGE

MEDIA INSTANCES

2,124

891% INCREASE

AUDIENCE REACH THROUGH MEDIA

13+ BILLION

INFLUENCER CAMPAIGN

AUDIENCE REACH

108,800

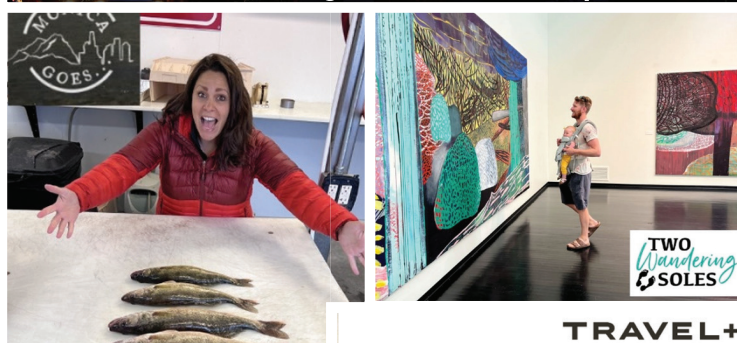
IMPRESSIONS

725,183

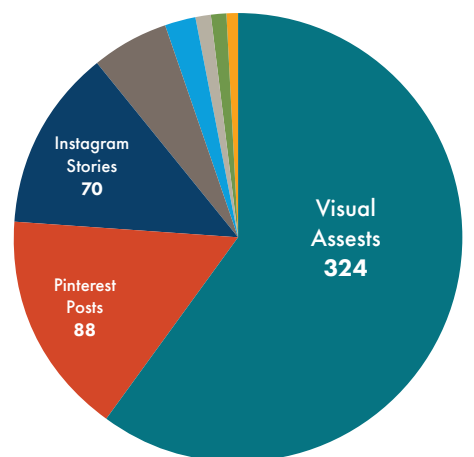
SOCIAL MEDIA ENGAGEMENTS

80,253

North Dakota Tourism extended the co-op influencer campaign, positioning North Dakota as a top travel destination with unforgettable, under the radar adventures located throughout the state.

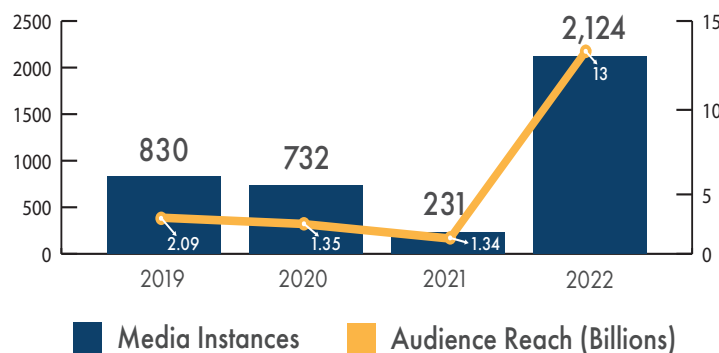


2022 Partner Results



Instagram: 30 Facebook Posts: 12 TikTok Posts: 6
Instagram Reels: 6 Tweets: 4

Earned Media Results



SOCIAL MEDIA

Social media gives us worldwide platforms to showcase North Dakota. Our goals are centered around audience engagement, travel counseling, generating traffic to the website, and educating residents and visitors about activities, communities, and attractions in our state.

164,519



FOLLOWERS

5% increase

1,000,535



ENGAGEMENTS

22% increase

223,789,835



IMPRESSIONS

22% decrease

74,924

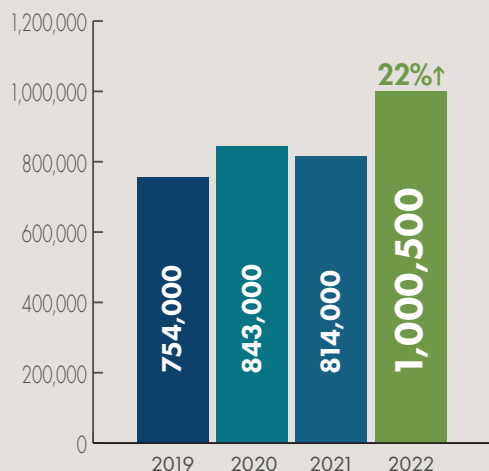


WEB TRAFFIC

13% decrease

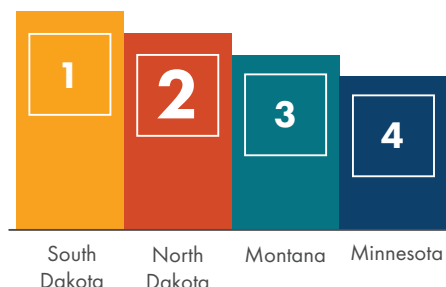
Total Engagements

Engagements are any interactions the audience is taking with our content. They are a strong indicator of interest in North Dakota.



North Dakota Ranks Second in Engagement Rate

Engagement rate shows how often your audience is interacting with your content despite the size of your following. North Dakota ranks second compared to neighboring states.



More Highlights of 2022

FACEBOOK
GREW

22%
YOY

SUNFLOWER
MAP GENERATED
WEBSITE VISITS

20,000

YOUTUBE
GREW

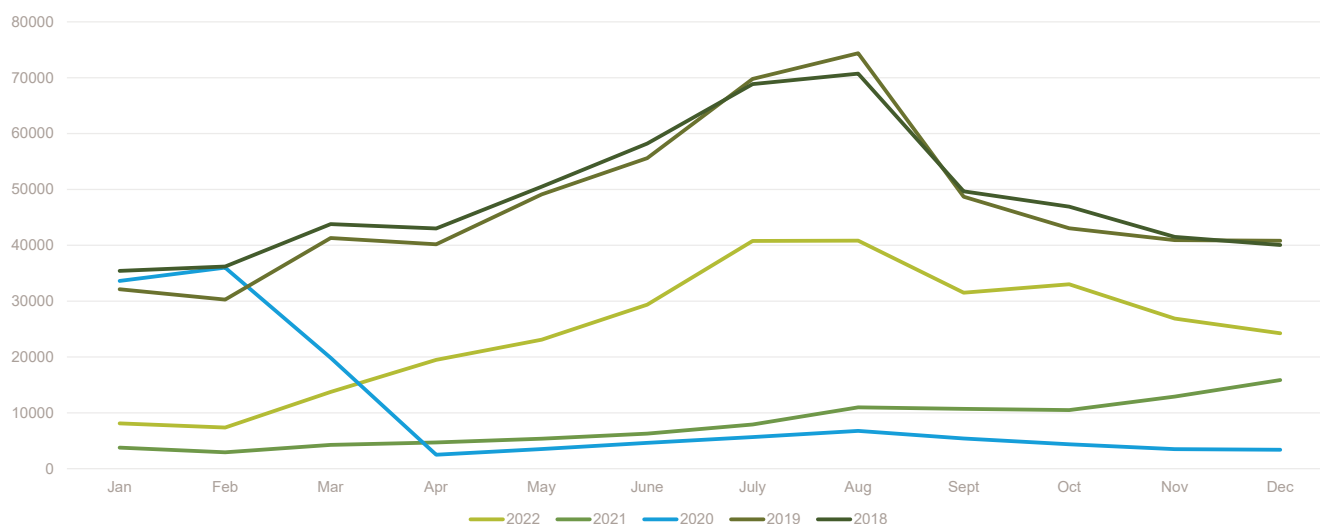
64%
YOY



BY THE NUMBERS

Since April 2020, there have been 840,027 personal bus and auto passengers entering the U.S. through North Dakota ports-of-entry. This is down 75.4% from the previous 33 months. At just 24.6% of the pre-pandemic volume of personal entries, the lost Canadian visitor spending due to the pandemic and border restrictions is estimated at more than \$344 million.

CANADIAN BORDER CROSSINGS INTO NORTH DAKOTA (Personal Vehicles)



NORTH DAKOTA TRAVEL INDUSTRY

Travel Segment	2021	2022	+/-
State Park Visitors	1,344,741	1,135,538	-16%
National Park Visitors	826,099	698,119	-15%
Major Attractions	3,999,505	4,108,799	3%
Local Visitor Centers	52,375	49,994	-5%
Cumulative Lodging Tax	\$5,552,640	\$7,350,904.14	32%
ND Airport Deplanements	88,7804	1,023,816	15%
Canadian Border Crossing	96,219	298,463	210%
Statewide Hotel Occupancy Rate	47.7%	52.9%	11%

TAXABLE SALES & PURCHASES THROUGH 3RD QTR 2022

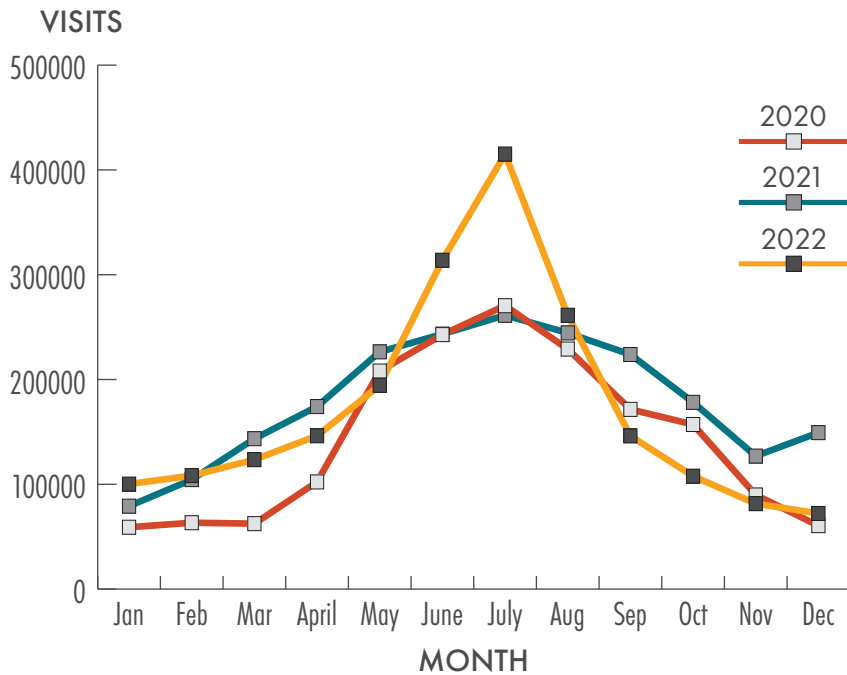
Accommodations/Food Services

2021	2022	+/-
\$1,382,650,572	\$1,520,225,611	9.53%

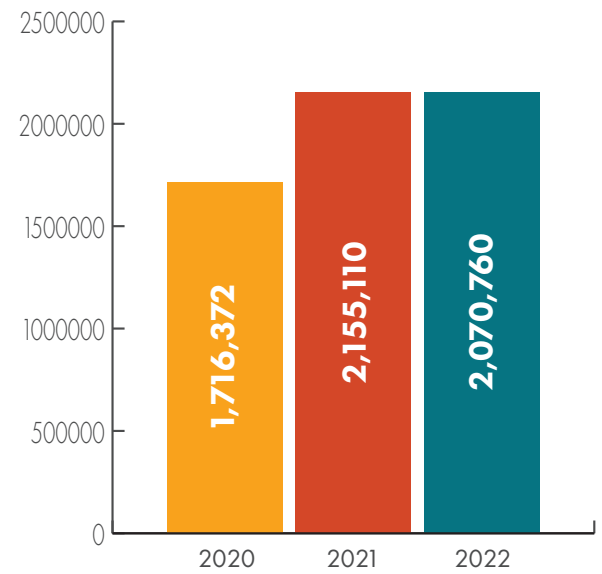
Arts/Entertainment/Recreation

2021	2022	+/-
\$98,550,322	\$121,642,968	22.09%

TOTAL WEB VISITS BY MONTH



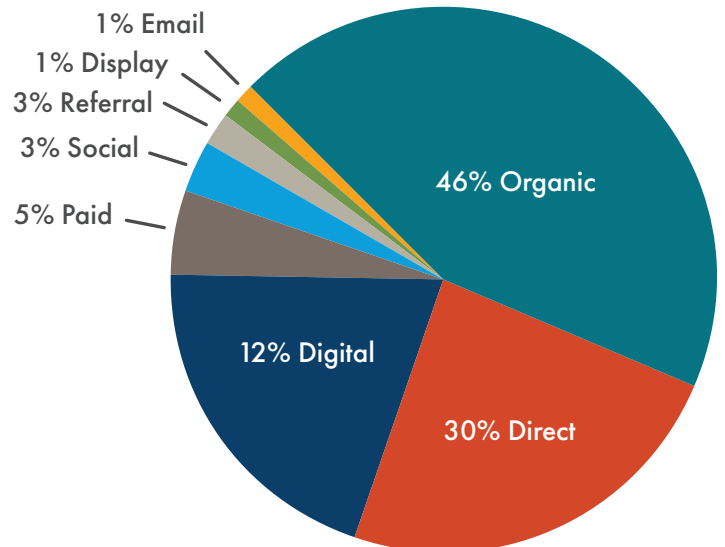
TOTAL WEB VISITS BY YEAR



TOP LOCATIONS FOR WEBSITE TRAFFIC

Rank	Location
1	North Dakota
2	Minnesota
3	Illinois
4	Wisconsin
5	Texas
6	California
7	Colorado
8	New York
9	Florida
10	Arizona

ORIGIN OF SITE TRAFFIC FOR NDtourism.com



For a complete list of references used to compile the data contained within this report, please email marketing@nd.gov or call 1-800-HELLOND.

GLOBAL MARKETING

International travel rebounded in 2022. In-person sales events welcomed new staff from international travel companies, resulting in needed training for new staff with little awareness of North Dakota.



North Dakota was added as a destination in 51 new itineraries with 174 overnights across the seven international markets. Across all 125 tour operators, North Dakota added 462 trips, giving North Dakota 1,266 overnight offerings. Within these itineraries, 18 communities across North Dakota are featured.

NORTH DAKOTA WAS
FEATURED IN
96 STORIES
AND REACHED
224M READERS
AND EARNED AN
EQUIVALENT OF
\$2.4M
IN EDITORIAL COVERAGE

OVERNIGHTS OFFERED
IN THE STATE WAS
INCREASED
24%
FROM 2021, WITH A
REGIONAL MARKET
SHARE INCREASE OF
19.5%

187 shareable leads were generated from the nation's largest Global Market Place International Pow Wow (IPW), International Roundup (held in Fargo), and BrandUSA Travel Week in 2022, along with 193 leads from missions to France, the Nordic Countries and the United Kingdom.

We hosted 12 product development and media tours that included 45 individuals. These media and travel trade representatives visited 17 communities and spent 48 nights in the state.

TRIBAL TOURISM

North Dakota Tourism and the North Dakota Native Tourism Alliance (NDNTA) continue to collaborate to develop and promote visitation to tribal lands, events, and attractions. The position of NDNTA executive director was created and will also oversee the creation of the Native American Cultural Tours (NACT).

This will essentially be a tribally owned receptive tour operator. North Dakota Tourism will continue to partner with the five Tribal Nations in education and promotion of tribal lands, cultures, and history to travelers from near and far.

North Dakota Tourism along with the NDNTA and the five Tribal Nations will continue to work together to create and enhance tourism opportunities across North Dakota and attract media and travel trade to showcase to the world.



GROUP TRAVEL



The group/motorcoach industry creates tours for customers that want to travel to, from and within North America.

One meeting at the American Bus Association resulted in a product development tour that visited seven communities and 18 attractions. This operator created an itinerary and sold this tour with four overnights. In 2023, 35 participants will fly into Bismarck and visit four communities in North Dakota.

8 NEW TOURS INCLUDED
18 OVERNIGHTS
36 COMMUNITIES
WITH AN IMPACT OF
\$800,000

120+
FACE-TO-FACE
MEETINGS LED TO
8 NEW TOURS

OUTDOOR MARKETING PROGRAM

Tourism and Marketing's outdoor promotion works to introduce outdoor enthusiasts to travel worthy adventures in North Dakota. Efforts include paid sponsorships, media relations, social media, visitor services and consumer travel shows.



New tourism campaign shot taken at Devils Lake

Marketing

- Sponsorships guarantee state outdoor messaging is being delivered to a broad regional & national audience in targeted niche areas.
- Many of these sponsorships include editorial and advertising content that highlight specific regions or communities that have interesting outdoor stories to tell.
- It is key for partners to update information about new trails, access for hunting or fishing, and new recreation providers such as equipment rentals or guides and outfitters that can attract out of state travelers for outdoor adventures.

Sport & Travel Shows

- To promote the state's outdoor adventure, we participate in consumer shows that bring our destinations face to face with potential travelers.
- There are opportunities for tourism partners to participate at the shows in person and there are options to distribute materials to outdoor enthusiasts across the upper Midwest.
- These shows have also been a place to meet and communicate with outdoor media and influencers.
- Commerce has been monitoring and studying the ROI of consumer shows to determine whether these shows create enough trips and interest to continue participation at the shows.

Outdoor Media Relations

- Outdoor promotion focuses on garnering editorial content with influential outdoor communicators through their media outlets.
- Tourism and Marketing Division staff create and manage relationships with members of outdoor media groups.
- This is important because hosting the right media can produce huge returns on relatively small investments.
- Our work focuses on influencing travel media to produce media instances about the state that will motivate trips that will produce positive economic impacts in our communities.

Sponsorship Partners

Ron Schara Productions
Jason Mitchell Outdoors
Midwest Outdoors
Ducks Unlimited
Delta Waterfowl
National Parks Magazine



1,600+

Sport show
booth attendees
in Minnesota &
Wisconsin



24,300

Hunting & Fishing
guides distributed
by end of July

Local Partners



Local partners can help welcome guests on product development/media trips to introduce media & travel influencers to attractions and communities.

North Dakota Department of Commerce recognizes that tourism development has the potential for economic and sociocultural effects that will positively impact further growth in our state. As our state continues to lead innovation in several economic development sectors, we understand the importance of creating a better quality life for our residents by connecting resources to drive economic growth. In addition, we recognize the importance of developing unique tourism experiences that share our story with non-residents to increase tourism revenue and to bring awareness of North Dakota, which supports workforce talent recruitment to the state.



Citizens Alley Pocket Park Ice Rink in Minot



The marina at Lake Sakakawea State Park

THE MAIN STREET OUTDOOR RECREATION GRANT

The Main Street Tourism Outdoor Recreation Grant was offered to support new or expanding businesses that would provide new outdoor recreation opportunities, improve visitor experiences, and would attract visitors and increase visitor expenditures in North Dakota. The Department of Commerce awarded six projects Main Street Outdoor Recreation Grants in 2022.



\$100,000

WAS AWARDED TO SIX PROJECTS ACROSS THE STATE. FIVE PROJECTS OFFER WINTER EXPERIENCES.

- A dedicated tourism business developer position was created to focus on attracting new tourism businesses and offerings to the state by addressing identified gaps. Areas of focus include outdoor recreation, value-added recreation, agritourism, arts, culture and heritage of North Dakota, venues, unique accommodations, culinary experiences, themed education and entertainment attractions, and other legacy projects.
- Commerce and the Tourism and Marketing Division understand the importance of attracting visitors and residents to North Dakota. As a result, the Main Street Outdoor Recreation Grant was created to support new or expanding businesses that provide new outdoor recreation opportunities, improved visitor experiences, and, with an emphasis on attracting visitors to North Dakota communities.
- Commerce's Economic Development and Finance Division and the Tourism and Marketing Division continue to work together to establish additional financial package opportunities for tourism business recruitment and expansion through primary sector certification. The certification allows qualified tourism businesses to apply for additional packages to enhance profitability.

AGRITOURISM



A canola field near Bowman

North Dakota's farm and ranch legacy is well known, and visitors are seeking more farm and ranch experiences. Our AgriTourism development work seeks to assist farmers and ranchers in diversifying their operations to generate income through activities, accommodations, rentals and on-site sales.

ND AgriTourism

PARTNER ENGAGEMENT

North Dakota Tourism staff works to identify, build, and sustain strong relationships with tourism and industry partners around the state. They are also at-the-ready to assist partners with research, presentations, resources, content, assets, promotional materials, and more. North Dakota Tourism relies on partner-listed and provided attractions, events, accommodations, guides, visitor centers and services, and works to promote them.



Tourism and Marketing staff visiting Fort Dilts State Historic Site on their southwest familiarization tour.

2022 Highlights

200

MORE THAN 200 TOURISM PROFESSIONALS ATTENDED THE 2022 TRAVEL INDUSTRY CONFERENCE IN GRAND FORKS.



COMMERCE NEWSLETTER HAD AN ENGAGEMENT RATE OF 60% IN 2022. TOTAL SUBSCRIBERS HAD A GROWTH OF 99.51% OVER THE PAST 12 MONTHS WITH OVER 20,000 SUBSCRIBERS.

15

A TOTAL OF 15 PARTNERS PARTICIPATED IN NINE DIFFERENT CO-OP ADVERTISING OPPORTUNITIES.

60

MORE THAN 60 TOURISM PROFESSIONALS ATTENDED THE 2022 TOURISM INDUSTRY MARKETING SUMMIT.

2,600+

PARTNER LISTINGS ON WEBSITE

1,600+

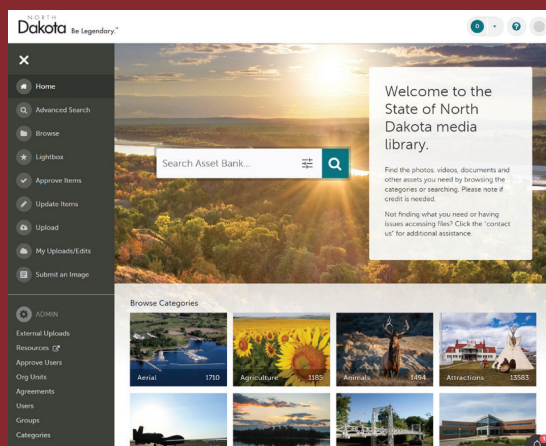
PARTNER LISTINGS IN TRAVEL GUIDE

244,000+

REFERRALS TO PARTNER WEBSITES

STATE MEDIA LIBRARY

The State Media Library allows for easier sharing and a boost to the visuals used across state government. It also increases the visuals available to partners, media and more.



325%

STATE AGENCY USERS ACCESSED SITE INCREASED

39%

RETURNING VISITORS INCREASED

94K+

DOWNLOADABLE ASSETS

15K+

ASSETS UPLOADED

- 12,230 downloads
- Top downloaded images include formatted Teams backgrounds, Theodore Roosevelt National Park, Lake Sakakawea, sunflowers, Missouri River and Pembina Gorge
- 5,461 visitors to the State Media Library

medialibrary.nd.gov

VISITOR SERVICES & SALES

The Tourism & Marketing Division produced hunting and fishing information sheets to fulfill inquiries in 2022. Information pieces were available for distribution in visitor centers, used to fulfill inquiries, and placed in rest areas throughout the state. Commerce also creates and manages e-news blasts, website articles and content on NDtourism.com.

LIVE CHAT TRAVEL COUNSELING

ONLINE TRAVEL COUNSELORS HAVE RESPONDED TO

890+

LIVE CHATS WITH POTENTIAL NORTH DAKOTA VISITORS

FROM MAY TO DECEMBER OF 2022
THE BOT HANDLED

700+

INQUIRIES BY POTENTIAL VISITORS

In May of 2022, North Dakota Tourism launched a BOT to assist visitors. The BOT handled over 700 inquiries by potential visitors. The BOT was able to answer questions on campground, lodging, travel guide, attractions and events, Canadian border, trails and byways, outdoor recreation, and general North Dakota information.



Real comments
from actual chat
participants!

North Dakota Guide Distribution



244,320

REFERRALS TO
PARTNER WEBSITES



189,000+

TRAVEL GUIDES
DISTRIBUTED
28,000 THROUGH
REST AREAS

WE ARE AVAILABLE TO VISITORS AROUND THE WORLD



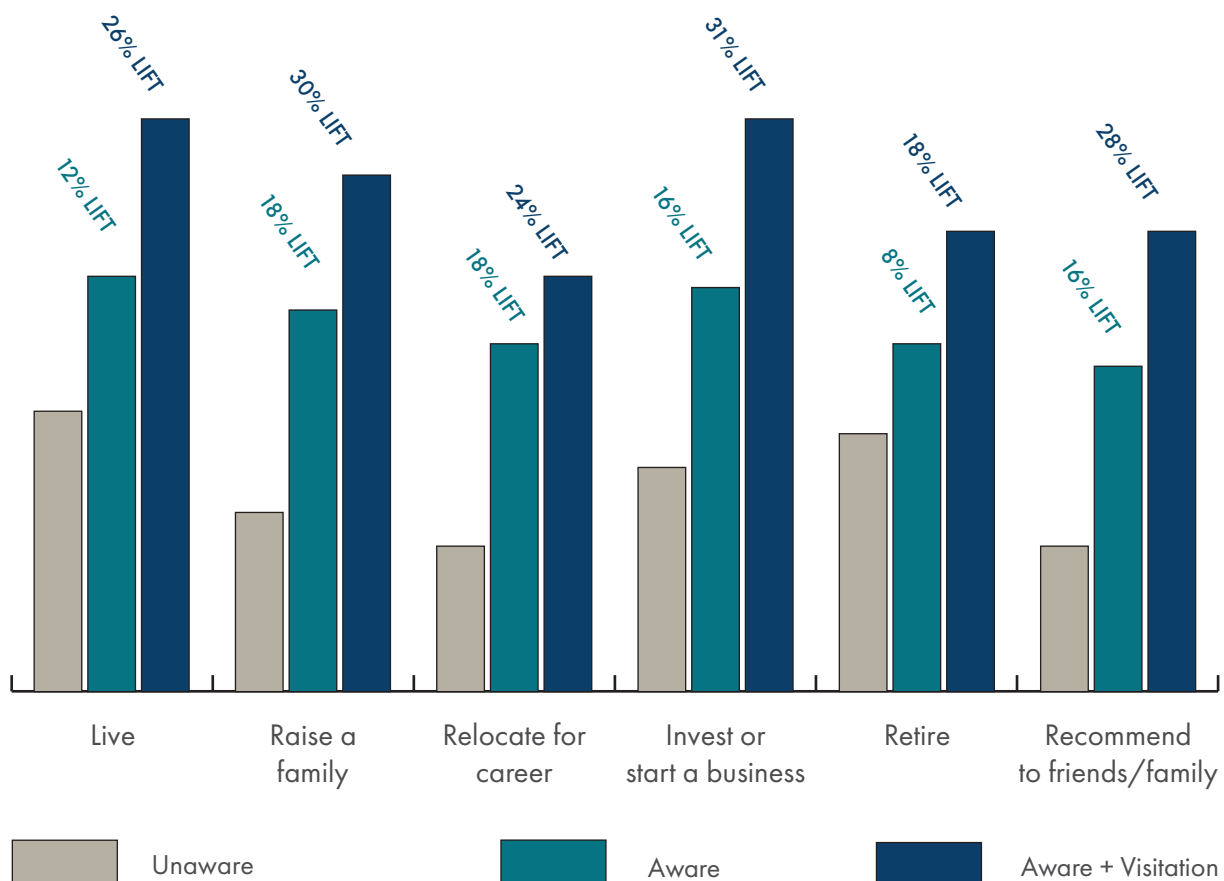
The expanded work of North Dakota Tourism and its tourism and marketing staff focuses on brand building and the integration of visitation, relocation, talent attraction, Main Street, and economic development efforts.

Research shows that North Dakota Tourism's promotional campaigns create a "halo effect" beyond motivating travel. Ripple effects of advertising positively impact the state's image as a place to live, work, start a business, attend college, purchase a home, and retire.

HALO EFFECT OF NORTH DAKOTA TOURISM MARKETING

TOURISM ADVERTISING ELEVATES NORTH DAKOTA'S IMAGE

Advertising is a powerful tool with the ability to change perceptions, attitudes and behaviors. Research shows that North Dakota Tourism's promotional campaigns create a "halo effect" that lifts image and diversifies the economy through increased visitation and makes North Dakota a more favorable place to visit, live, raise a family, work or advance your career, or invest or grow a business.



A LEGENDARY INDUSTRY AT A GLANCE



21.71 MILLION

VISITORS IN 2021
A 19% INCREASE OVER 2020



\$2.61 BILLION

IN VISITOR SPENDING
A 23.5% INCREASE OVER 2020



\$237.9 MILLION

ESTIMATED STATE & LOCAL TAX
REVENUE – AN 8.6% INCREASE



41,681

JOBS SUPPORTED BY THE
TRAVEL INDUSTRY



4,899,538

HOTEL ROOM NIGHTS SOLD
12.6% OCCUPANCY INCREASE



1,023,816

AIRPORT ARRIVALS
15.3% INCREASE



1,833,657

STATE AND NATIONAL PARK
VISITORS – A 15.53% DECREASE



298,463

CANADIAN BORDER CROSSINGS
A 210.1% INCREASE

VISITOR SPENDING BRINGS OUTSIDE DOLLARS INTO NORTH DAKOTA'S ECONOMY.



\$384

MILLION IN
LODGING



\$767

MILLION IN
FOOD & BEVERAGE



\$521

MILLION IN
TRANSPORTATION



\$374

MILLION IN
RECREATION



\$565

MILLION IN
RETAIL

**breakdowns in spending are from 2021*

NORTH
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Be Legendary.

Tourism & Marketing
COMMERCE

1600 E Century Ave., Suite 6
Bismarck, ND 58502-2057
1-800-435-5663
www.NDtourism.com



@TravelND



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