

TOURISM AND STATE MARKETING UPDATE—Q1 2023

Area of Travel	1st Qtr 2023	1st Qtr 2022	% Change 23-22			
State Park Visitors	74,605	81,218	-8%			
National Park Visitors	12,900	13,551	-5%			
Website Visits	326,606	332,025	-2%			
Major Attractions - pending 1	593,586	629,354	-6%			
Local Visitor Centers	2,549	3,971	-36%			
Cumulative Lodging Tax	\$1,618,534.08	\$1,452,076.69	11%			
Canadian Border Crossing	73,411	29,218	151%			
ND Airport Deplanements	280,243	250,902	12%			
Statewide Hotel Occupancy Rate						
January	43.8%	39.4%	11.2%		2023 YTD 48.1%	
February	48.3%	43.4%	11.3%		2022 YTD 44.3%	
March	52.4%	48.6%	7.8%		% Change 8.7%	
Statewide ADR-Average Room Rate						
January	\$89.75	\$81.97	9.5%			
February	\$93.49	\$87.75	6.5%			
March	\$95.88	\$87.97	9.0%			
RevPAR				\$44.79	\$38.00	17.9%
Taxable Sales and Purchases						
			2022 YTD	2021 YTD	% Change	
			Arts, Entertainment & Recreation	\$150,675,957	\$123,263,094	22.24%
			Accommodation & Food Services	\$2,018,335,015	\$1,854,048,663	8.86%

STATEWIDE TOURISM UPDATES

Despite a winter in which interstates were closed a record, and combined, 430-hours due to weather and road conditions, visitation reports during Q1 were encouraging.

- The average statewide hotel occupancy has surpassed 2019 levels and is at an eight-year high.
- January visitation to Theodore Roosevelt National Park was 32% higher than its 10-year monthly average. But weather impacted visits in February and March.
- January deplanements outperformed 2019.
- Border crossings into North Dakota from Canada were 151% higher than 2022, but remain only 75% recovered from pre-pandemic closures.
- Through mid-March, Arrivalist has verified 567k U.S. road trips to North Dakota with 48% spending at least one night in a destination. Q1 growth has been seen from primary markets including Minnesota, South Dakota, Montana, Colorado and Wyoming.
- International Inbound Travel Association Summit resulted in 24 appointments with 25 leads generated. International media featured North Dakota in 51 stories reaching more than 225M with an ad value of \$2.11M.
- Group travel shows, including American Bus Association, Go West, and Midwest Marketplace, resulted in 109 appointments.
- More than 700 people stopped at the North Dakota booth at the Northwest Sportshow in Minneapolis.
- Hosted a writer from Outsider Magazine to do a winter story featuring the national park.

INTENT TO TRAVEL METRICS

TRADITIONAL INQUIRIES

6,148 (↓24% YOY)

ENEWS OPEN RATE

45.71% (↑5% YOY)

LIVECHATS

61 by counselors
319 by BOT

WEBSITE VISITS

327K (↓1.6% YOY)

TOURISM MARKETING EFFORTS

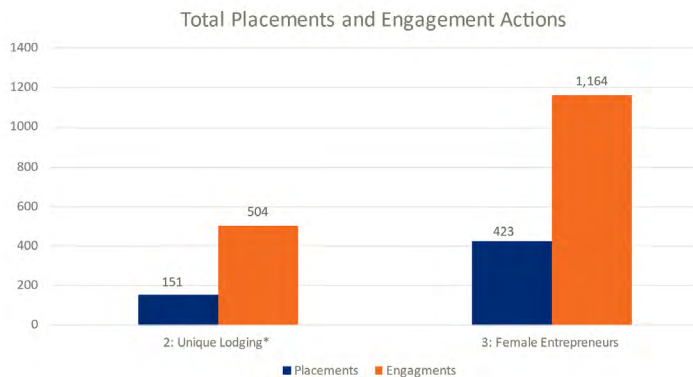
- Governor Doug Burgum joined Tourism & Marketing Director Sara Otte Coleman in announcing the Tourism Division's new advertising campaign, called "Hello." The campaign is built off the foundation of North Dakota's renowned hospitality. It invites guests to experience events, outdoor recreation, welcoming communities and attractions across the state. The 2023 media plan was announced during Q4 2022.
- Q1 media placements included print in AAA Living, Midwest Living, Better Homes & Gardens, Ducks Unlimited, and North Dakota Living; along with TV spots airing on outdoor programming with Jason Mitchell Outdoors and Lindner Media.
- Paid search campaigns in both the U.S. and Canada started early into Q1. Overall search volume was down however during the quarter, factors included weather and inflation.
- Arrivalist reports a 29% average arrival lift from advertising exposures through Q1.
- Website enhancements reflect the new campaign, and the URL www.HelloND.com is being used to promote the state's tourism offerings. Year-to-date, website inquiries are 70% ahead of 2022.



MEDIA RELATIONS EFFORTS

535 national media mentions reached 3.8B.

Great coverage from national release strategy along with other pitches on northern lights and watchable wildlife.



TOURISM SOCIAL MEDIA

Total Followers
166,497



TOTAL
IMPRESSIONS
6.63M

VIDEO
VIEWS
125K

Celebrating winter, historical stories, MeatEater visiting Devils Lake, and the opening of exciting new attractions generated millions of impressions and 25,600 visits to the website to learn more about traveling to North Dakota.

Featured Content

Northern lights stole the show this January with top publications naming Theodore Roosevelt National Park a top viewing destination as well as sharing photos from northern lights chasers from around the state.



STATE MARKETING AND COMMERCE UPDATE—Q1 2023

COMMERCE MARKETING EFFORTS


- More than 200 pitches, news releases and direct communications efforts resulted in 91 in-state and 1,690 national media mentions reaching more than 5B.
- Workforce hosted a booth at an open house held by Job Service in January. Staff took the opportunity to promote the various tools available to employers and workers alike.
- Main Street Initiative Community Chats were held in January, February, and March. Each month focused on a different topic that impacts Main Street Communities throughout North Dakota.
- Workforce hosted a booth at the Virtual National Job Fair on February 8, 2023, to promote Find the Good Life in North Dakota.

FIND THE GOOD LIFE MARKETING

- Paid digital media placements, and keyword and email marketing continued for all four target audiences (young families, grads, veterans, and boomerangs), resulting in over 18M impressions and 91K click-throughs to the Find the Good Life in North Dakota website.
- The Relocation Help Desk webpage was the second highest visited webpage, with 4K+ visits, surpassed only by the Find the Good Life homepage with over 29K visits in Q1. This resulted in 407 overall Relocation Help Desk requests in Q1, an average of 135 requests per month.
- The paid social media campaign continued using both Facebook and LinkedIn, garnering over 650K impressions and over 130K engagements.

STATE MARKETING – LOGO AND BRAND COMPLIANCY

- Consultations with: Financial Institutions, University of North Dakota, and Water Resources
- Created logo lockups for: Department of Corrections Medical, Water Resources, Industrial Commission, Global Engagement Office, NDI – Health Information Network, NDI – GIS, and NDI – EduTech




OUTDOORS

National Parks Journal: North Dakota's Theodore Roosevelt National Park is that Less-Traveled Path Worth Traveling

"The Badlands of North Dakota paint its backdrop, and the people hold a genuine charm and hospitality that has to be faked elsewhere. If you're in Medora year-round, it's because you want to be. And after a visit, that's an easy state of mind to understand."

-Jon Bumpus




FarmProgress

Soil health program first of its kind

"This has not been done anywhere else. We're in a unique position in North Dakota to implement this program and lead the effort, and I anticipate it will expand to other states."

-Abbey Wick



EXPANSION SOLUTIONS
ESM
MAGAZINE

Data Center Sector to Expand Exponentially

"Companies are moving away from Tier 1 data markets. We're starting to see great interest in markets like Minneapolis and Fargo, which offer necessary infrastructure."

-Bruce Curling

As a result of our relationship with Mark Smith, DCI secured an interview about data center expansions in the U.S. Bruce Curling, CCO of Bitzero, interviewed for this story, which published in Expansion Solutions Magazine.

MEDIA PLACEMENTS

Quality of place – 351 national media mentions reaching 351M – Primary topics include national news release on female entrepreneurs in North Dakota, Top State to Retire and Livability content.

Business – 454 national media mentions reaching 635M – Primary topic coverage included Thread announcement, O'Leary Ventures and North Dakota Startups.

Workforce – 350 national media mentions reaching 326M – Primary topic coverage include PR Newswire Entrepreneurs, Find the Good Life, most welcoming, and Livability pieces.

COMMERCE SOCIAL MEDIA

TOTAL
IMPRESSIONS
309K

TOTAL
ENGAGEMENTS
11K