

TOURISM AND STATE MARKETING UPDATE—Q4 2022

Area of Travel	4th Qtr 2022	4th Qtr 2021	% Change 22-21			
YEAR TO DATE TOTALS AVAILABLE IN THE ANNUAL REPORT						
State Park Visitors	113,305	142,995	-21%			
National Park Visitors	59,139	69,520	-15%			
Website Visits	261,438	454,459	-42%			
Major Attractions	1,057,328	1,233,969	-14%			
Local Visitor Centers	5,231	6,605	-21%			
Cumulative Lodging Tax	\$2,061,692.92	\$1,698,290.59	21%			
ND Airport Deplanements	258,051	246,883	5%			
Canadian Border Crossing	84,153	39,287	114%			
Statewide Hotel Occupancy Rate						
October	59.8%	47.6%	25.8%			
November	48.1%	45.4%	5.9%			
December	42.0%	39.8%	5.5%			
Statewide ADR-Average Room Rate						
October	\$91.71	\$84.62	8.4%			
November	\$88.72	\$81.08	9.4%			
December	\$88.40	\$81.42	8.6%			
RevPAR				\$40.97	\$32.95	24.3%
Taxable Sales and Purchases						
			3rd Quarter 2022	3rd Quarter 2021	% Change	
	Arts, Entertainment & Recreation		\$61,461,645	\$51,482,366	19.38%	
	Accommodation & Food Services		\$565,608,316	\$514,620,717	9.91%	

Q4 STATEWIDE TOURISM UPDATES

- Arrivalist verified 1.8 million U.S. road trips to North Dakota during the quarter, with 63% spending at least one night in destination. Overall visitor volume was down compared to Q4 2021.
- Border crossings from Canada increased 114% from Q4 2022. The 84,153 personal vehicles entering ND during Q4 was the highest quarter of the year.
- Traditional inquiries were 20% higher than Q4 of 2021.
- Hotel occupancy ended the quarter 3.7% higher than Q4 2021 and the year as a whole was 11.5% higher than 2021.
- Lodging tax collections, from reporting CVBs, were 21.3% higher than Q4 of 2021.
- The popular outdoor show Meateater aired their episode on Devils Lake in December. Tourism helped the Meateater crew with the episode in early 2022.
- The crew from the Outdoor Channel show The Flush were filming an episode in the state in late October. North Dakota Tourism is a long time partner of the show and assists in developing North Dakota story concepts.
- UK Mission leads: Trade 53, Airline 4, Receptive Operators 2, Media 15 for a total of 74.
- Overseas office Trainings: Australia, Benelux.
- Media: Germany 2 days with Tri County Alliance.
- Geoconquesting: National Tour - 11/13-11/16: 33,962 impressions, 21 clicks to the website with 0.06% click through rate.
- National Tour Retargeting: 11/17-12/16: 55,049 impressions, 37 clicks to website, 0.7% click through rate. Total impressions: 89,011, total clicks to website: 58.

INTENT TO TRAVEL METRICS

TRADITIONAL
INQUIRIES

3,893 (↑20% YOY)

ENEWS
OPEN RATE

2,307% (↑49% YOY)

LIVECHATS

75 by counselors
205 by BOT

WEBSITE VISITS

261 K (↓42% YOY)

DIGITAL AD
CONVERSIONS

504 (↓76.5% YOY)

Q4 TOURISM MARKETING EFFORTS

- Outdoors media placements with Ron Schara Productions and Jason Mitchell Outdoors along with the Green Bay Packers sponsorship carried advertising into Q4.
- In 2021, Cares Act dollars enabled the purchase of new media, and extended all digital campaigns through December 2021. As a result, both ad presence and results were decreased comparing Q4 of 2022 to the previous year.
- Website traffic was down 42.47%
- Digital ad exposures decreased 87.1%, and as a result, advertising-connected arrivals were down 38.4%
- If we compare 2022 advertising results to 2019: website traffic was 81% higher with all digital efforts, including paid search, social, email and display outperforming the pre-pandemic year.

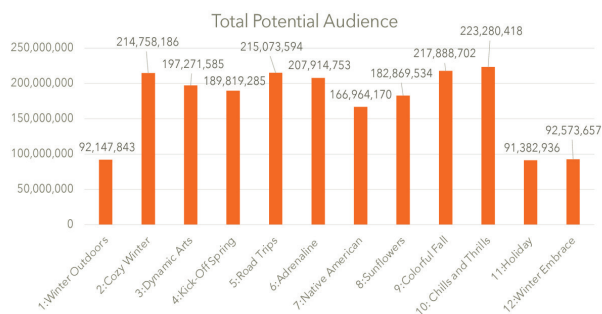


TOURISM

509 national media mentions reaching 5.5 billion.

One big win from these efforts was the hosting of a freelance journalist that resulted in a feature about Fargo in the New York Times reaching 140 million with another story planned in spring 2023 in Travel + Leisure magazine. (Image below)

PR Newswire releases played a major role with great interest in our winter experiences.



The New York Times

Geez, Even Fargo Has Gone Upscale

Visitors to the North Dakota town expecting a scene right out of the movie might be surprised by the James Beard-nominated chefs, Pride flags, hipster boutiques and craft breweries. Oh, and a museum dedicated to the bison.



The city of Fargo has proved visitors into revitalizing its downtown. One look for The New York Times

By Danielle Boff
Published Oct. 24, 2022 | Updated Nov. 1, 2022

TOURISM SOCIAL MEDIA

Total Followers
164,526



TOTAL
IMPRESSIONS
5.5M

VIDEO
VIEWS
262K

ND Tourism social thrived on seasonal events this quarter. Highlights included Minot's Pop Up Christmas Bar "Miracle on 10th", downtown parades and holiday lights. YouTube shorts also generated a 23% increase in subscribers and a 40% increase in engagements.

Featured Content

A celebration of the CP Holiday Train coming back to North Dakota after taking years off generated almost 2,000 shares, an engagement rate of 12% and near 20,000 link clicks.





STATE MARKETING AND COMMERCE UPDATE—Q4 2022

The Governor's Photo Contest winners were announced on Oct. 17. 19 images were awarded in six categories. The 2022 contest had a total of 471 entries from 79 photographers, with a limit of ten entries per photographer.

MAIN STREET SUMMIT MARKETING EFFORTS

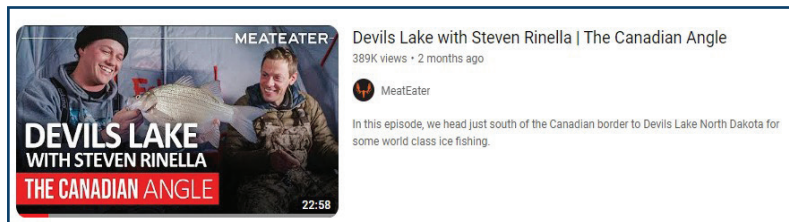
- A paid digital campaign, consisting of display, social and video ads, ran in September and October. This campaign served more than 2.5M impressions, resulting in 880 registrations for the Summit.
- Various collateral pieces were created for the event, including agendas, bingo cards, award plaques, room signage and digital curtain warmers.
- In-house Main Street Summit communications coverage prior and during the event consisted of:
 - 22 posts across all social platforms prior to the Summit resulted in 84,039 impressions.
 - 53 posts across all social platforms during the Summit resulted in 31,623 impressions.
 - Five GovDelivery emails resulted in 21,373 opens.
 - Seven press releases were sent, and we assisted with one (ND Works release) for the Governor's Office. The direct result of these releases and other topics related to the summit coverage reached 76,111,848 readers/viewers and had an advertising value equivalent of \$704,136.35.

FIND THE GOOD LIFE IN NORTH DAKOTA MARKETING

- Paid digital media placements, Keyword and email marketing continued for all four target audiences (Young Families, Grads, Veterans, and Boomerangs), resulting in over 17M impressions and 72K click thru to the Find the Good Life in North Dakota website.
- The Relocation Help Desk webpage was the second highest visited webpage, with 11K+ visits, surpassed only by the Find the Good Life homepage with over 74K visits in Q4. This resulted in 742 overall Relocation Help Desk requests in Q4, an average of 247 requests per month.
- The paid social media campaign continued using both Facebook and LinkedIn, garnering over 1.1M impressions and over 220K engagements.

STATE MARKETING – LOGO AND BRAND COMPLIANCY

- Consulted with: ndstrong.org / Aksal Group / Health and Human Services / Retirement & Investment Office
- Created logo lockups for: Corrections Crime Victims Compensation / Corrections Education / Corrections Training / NDHP Law Enforcement Academy



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
290K

TOTAL
ENGAGEMENTS
19K