

TOURISM AND STATE MARKETING UPDATE—Q4 2023

Area of Travel	4th Qtr 2023	4th Qtr 2022	% Change 23-22			
YEAR TO DATE TOTALS AVAILABLE IN THE ANNUAL REPORT						
State Park Visitors	not available	113,305	not available			
National Park Visitors	81,055	59,139	37%			
Website Sessions (Visits)	528,256	261,438	102%			
Major Attractions	1,086,721	1,057,328	3%			
Local Visitor Centers	4,924	5,231	-6%			
Cumulative Lodging Tax	\$2,266,628.83	\$2,061,692.92	10%			
ND Airport Deplanements	288,583	258,051	12%			
Canadian Border Crossing	101,850	84,153	21%			
Statewide Hotel Occupancy Rate						
October	64.1%	60.6%	5.8%			
November	51.8%	49.3%	5.1%			
December	45.2%	43.3%	4.4%			
Statewide ADR-Average Room Rate						
October	\$99.23	\$91.91	8.0%			
November	\$94.69	\$88.25	7.3%			
December	\$93.78	\$87.96	6.6%			
RevPAR				\$42.40	\$38.10	11.3%
Taxable Sales and Purchases						
			3rd Quarter 2023	3rd Quarter 2022	% Change	
Arts, Entertainment & Recreation			\$62,366,405	\$61,459,859	1.48%	
Accommodation & Food Services			\$599,139,902	\$566,225,643	5.81%	

STATEWIDE TOURISM UPDATES

- Arrivalist verified more than 2.2 million U.S. visits during the quarter, which was a 21% increase over Q4 2022. Day trips increased 15% over the previous year.
- Border crossings from Canada were 21% higher than Q4 2022. Canadian visitation is the only area that hasn't fully recovered to 2019 levels.
- Due to a high-performing program with Midwest Living, traditional inquiries surged during Q4 and were 72% higher for the quarter, ending the year 7% ahead of 2022.
- Hotel occupancy remained high for the quarter, ending 6.7% ahead of Q4 2022. North Dakota's occupancy, ADR and RevPAR all had increased that outperformed the national average.
- KFYZ-TV interview about fall pheasant hunting and the economic benefit of hunters.
- London Travel Week and Italian Mission lead to contacts across six of our markets. International media reached nearly 196M.

INTENT TO TRAVEL METRICS

TRADITIONAL
INQUIRIES
6,677 (↑72% YOY)

ENEWS
OPEN RATE
39.09% (↓7.16% YOY)

LIVE CHATS
47 by Counselors
190 by BOT

WEBSITE VISITS
528K (↑102% YOY)**

** GA (Google Analytics) UA and GA4 track differently. The numbers will not match perfectly, and the definitions have slightly changed. There is up to 20% discrepancy on sessions and users between the GA UA and GA4 numbers.

TOURISM MARKETING EFFORTS

- Sponsorships were a key component of the advertising campaign during the quarter with the Green Bay Packers, Ron Schara Productions and Jason Mitchell Outdoors showcasing HELLO North Dakota. Digital and social creative for fall, winter and outdoor recreation performed well.
- Digital ad exposures were 82% higher than the previous year netting 6,800 click-throughs.
- Arrivallist media attribution showed advertising increased 1- and 2-night stays for the quarter and increased visitation from near-border states of Minnesota, South Dakota and Montana.
- In one significant bonus, the wrapped train in Chicago remained active through year-end.



MEDIA RELATIONS EFFORTS

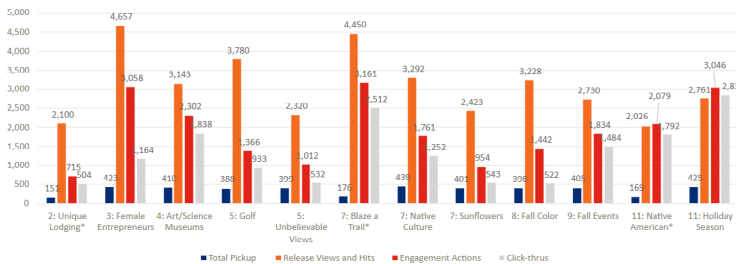
430 national media mentions reached 1.25B.

2023 OVERALL RESULTS | EARNED MEDIA

news release distribution

FM distributed 12 total news releases over PR Newswire that were picked up by local, regional and national media outlets.

Visibility Report Comparison



TOURISM SOCIAL MEDIA

Total Followers
176,246



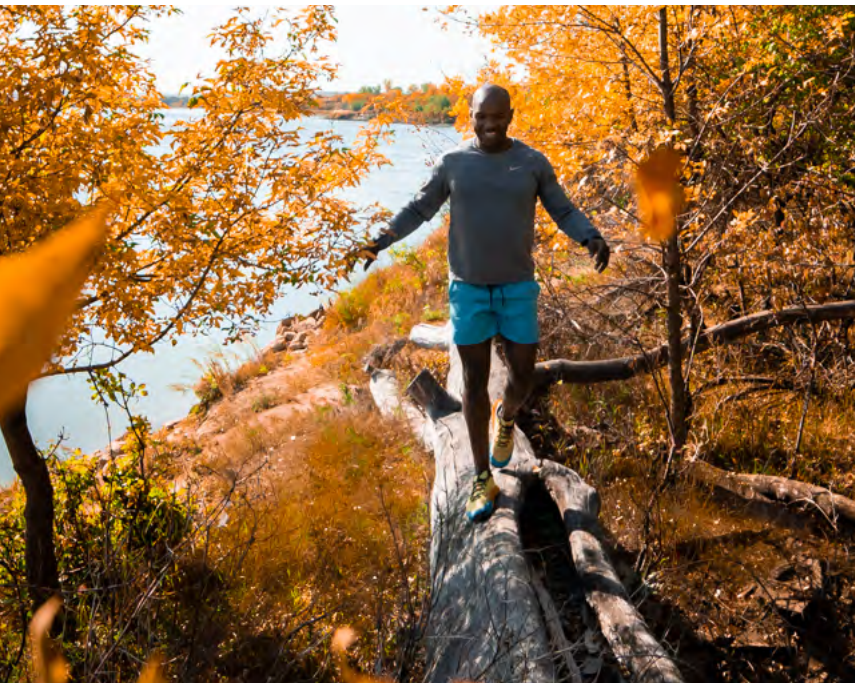
TOTAL
IMPRESSIONS
8.44M

VIDEO
VIEWS
292K

Social channels continue to outperform last year with strategies that focus on higher frequency on Facebook and identifying content with high audience interest. Impressions increased 52% YOY and engagements increased 103% YOY. Paid advertising generated almost 30,000 clicks to NDtourism.com. Short form video strategies encourage growth and engagement on Instagram.

Featured Content

A timely share of a rare winter phenomenon, ice discs, spread far and wide on social. This piece of organic content reached 1.7M and generated 1.8M impressions, and 25K engagements.



STATE MARKETING AND COMMERCE UPDATE—Q4 2023

COMMERCE MARKETING EFFORTS

- AmeriCorps campaign kicked off in October to drive awareness of the AmeriCorps volunteer positions and benefits, along with promoting funding opportunities for non-profit organizations. The campaign resulted in 2.75M impressions, 3.5K clicks, with a click-through rate of almost double the industry average.
- The 2023 Main Street Summit marketing was in full force, consisting of paid advertising in the forms of Facebook, LinkedIn, Twitter, online display, and online video, along with added value in the forms of TV and digital outdoor billboards. Press releases and interviews rounded out the media coverage leading up to the event, resulting in almost 500 registered participants. Unfortunately, due to weather, the Summit was canceled.

FIND THE GOOD LIFE MARKETING

- A Boomerang in-state holiday marketing campaign ran Nov. 20 – Dec. 31. The campaign consisted of video (broadcast and digital), display ads, streaming audio, digital outdoor, social media, and indoor marketing. More than 5M impressions were served, garnering almost 4K clicks.
- The Relocation Help Desk received 2,216 completed form submissions.
- The FTGL website had 40,425 users in Q4, a 19.6% increase from Q3 2023. The "Move Back" page was the most visited page, largely in part to the Boomerang in-state Holiday campaign.

STATE MARKETING

- A new project management platform, Wrike, was put in place for use by the Commerce Marketing team to allow for more collaboration, transparency, automation, and reporting.
- Logo Lockups for: Health & Human Services / Ethics Commission / Corrections & Rehabilitation.
- Consulted with: Ethics Commission (social media and icons) / Emergency Services / Health & Human Services (Gamblers Help, Bed Registry Program) / Corrections & Rehabilitation (clothing) / ND Rural Water Systems Association.

STATE MEDIA LIBRARY (PHOTO AND VIDEO)

- More than 3K downloads and 95K views for Q4 2023.
- 505 users with the average engagement time being over 23 minutes and 3.9 engaged sessions per user.



MEDIA PLACEMENTS

Quality of place – 28 national media mentions reaching 77M.

Business – 434 national media mentions reaching 921M.

Workforce – 15 national media mentions reaching 7M.

COMMERCE SOCIAL MEDIA

**TOTAL
IMPRESSIONS**
366K

**TOTAL
ENGAGEMENTS**
14K