



■ Photo provided by Heliconia, and taken as part of the Epic Trails filming in May 2023

NORTH
Dakota | Tourism & Marketing
Be Legendary. COMMERCE

ANNUAL REPORT 2023

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

HELLO



I am excited to report on North Dakota's thriving tourism industry, highlighting significant milestones and achievements in our 2023 annual report.

We launched a groundbreaking initiative, the Destination Development Grant Program, our state's first major investment of \$25 million into growing tourism offerings and providing financial support for the development and expansion of transformative tourism experiences. This program awarded funding to 14 entities to bolster economic prosperity and diversification, supporting the attraction of additional visitors and new talent, and improving the quality of life for our rural and urban residents.

Our strategic and targeted marketing efforts in 2023 focused on digital platforms and experiential campaigns to engage with our audience effectively.

KEY MARKETING METRICS INCLUDE:

- Our social media platforms experienced a 25% increase in engagement compared to the previous year, with interactive content and user-generated campaigns driving significant interactions.
- The official North Dakota tourism website witnessed a surge in traffic, with more than 2.7 million sessions, indicating intent to travel to our state.
- Our HELLO campaign reached a broader audience, with impressions surpassing 1.5 billion across various channels, including traditional and digital media, earned media, and social and influencer collaborations.

KEY VISITOR STATISTICS INCLUDE:

- Arrivalist verified more than 18.2 million U.S. trips to North Dakota in 2023, marking a 15% increase from the previous year.
- Domestic tourism remained robust, with a notable increase in visitors from neighboring states and key metropolitan areas in Wisconsin, Illinois, Texas, Colorado, Iowa, Washington, and California.
- Our efforts to attract international visitors yielded positive results, with a 10.4% increase in overseas visitors, and a 47% increase in border crossings from Canada, quantifying North Dakota's growing global appeal.
- The tourism sector contributed over \$3.55 billion to North Dakota's economy in 2023, supporting local businesses, job creation, and community development initiatives.

The awareness and integration of tourism as a pillar of our state's economy is exciting and I am grateful to our dedicated team, industry partners, and stakeholders for their unwavering support! Looking ahead, we remain committed to showcasing the best of North Dakota and fostering continued growth and prosperity within the tourism sector.

Thank you for your continued collaboration and support.

Be Legendary,

TOURISM DIVISION DIRECTOR

SIGNALS OF INTENT TO TRAVEL

WEBSITE TRAFFIC

– 2,771,017 SESSIONS

📈 33.8% increase from 2022

– 3,096,036 PAGEVIEWS

📈 1% increase from 2022

TRADITIONAL INQUIRIES

29,090

📈 7% increase from 2022

FACEBOOK PAGE VISITS

122,800

📈 594% increase from 2022

LIVE CHATS

2,013

📈 25% increase from 2022

EBOOKS

– TRAVEL GUIDE

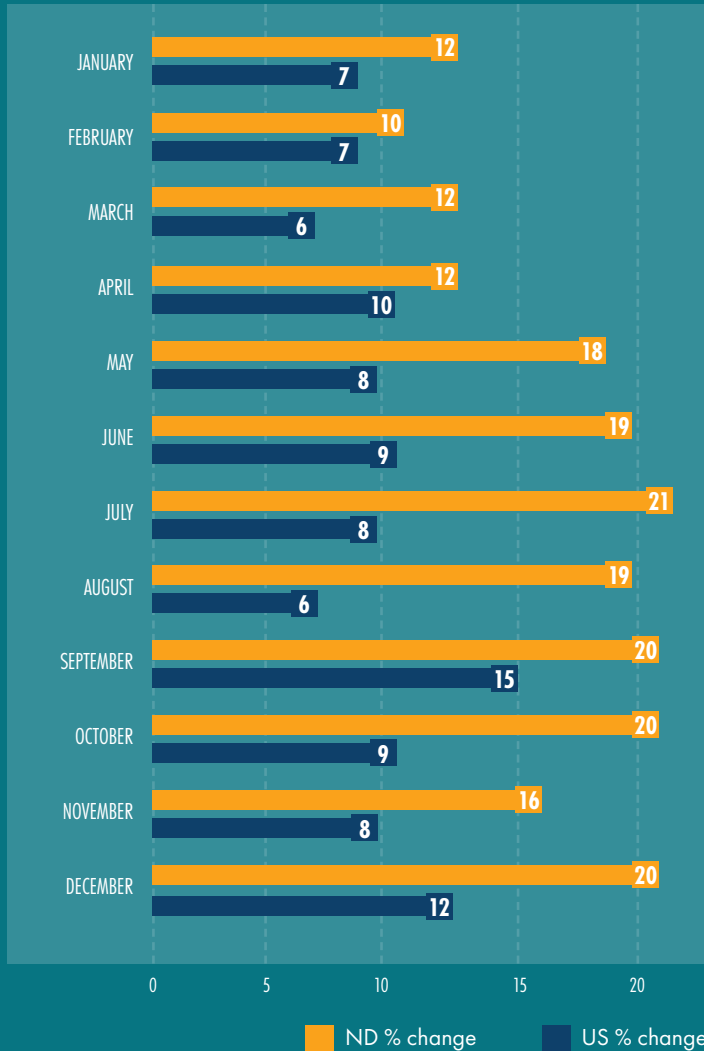
1,700+ Monthly Users
56,000+ Pageviews

– HUNTING & FISHING GUIDE

270+ Monthly Users
8,500+ Pageviews

NORTH DAKOTA OUTPACING THE U.S. IN TRAVEL SPENDING GROWTH

The U.S. Travel Association, in partnership with Tourism Economics, reported that North Dakota was among the top performing states in 2023, outpacing the U.S. as a whole in travel spending growth.



2023 U.S. ARRIVALS INCREASE

North Dakota partners with Arrivalist, a geo-location intelligence company, for data on U.S. adult road trips to the state. Arrivalist curates information from millions of devices/smart phones to report North Dakota visitation.

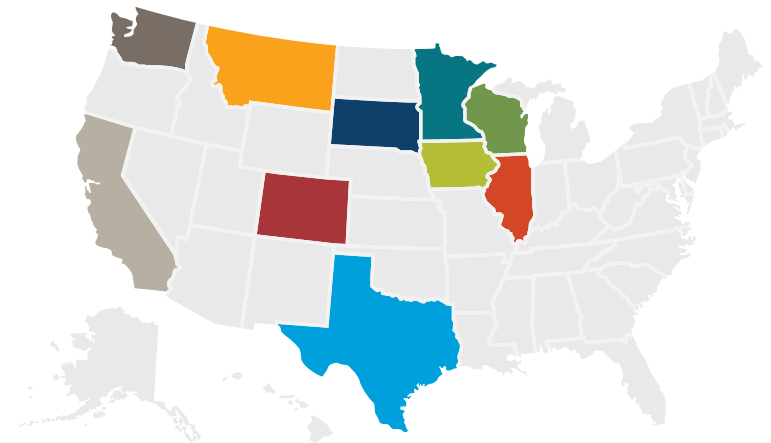
In 2023, Arrivalist data showed a 15% increase in U.S. visitation year-over-year. (Port-of-entry data shows that border crossings from Manitoba and Saskatchewan increased an additional 47%.)

U.S. Media Target Markets

DMA	% of Total U.S. Arrivals	Average Time in Destination
Minnesota	54.4%	1 day, 2 hours
South Dakota	11.6%	1 day, 17 minutes
Montana	8.3%	1 day
Wisconsin	2.9%	1 day, 15 hours
Illinois	2%	1 day, 9 hours
Colorado	1.6%	2 days, 7 hours
Arizona	1%	2 days, 23 hours
Nevada	.4%	2 days, 13 hours

Top 10 Out-of-State Markets

- 1 Minnesota
- 2 South Dakota
- 3 Montana
- 4 Wisconsin
- 5 Illinois
- 6 Texas
- 7 Colorado
- 8 Iowa
- 9 Washington
- 10 California



Advertising & Marketing

HELLO

North Dakota Tourism, in partnership with agency Odney, launched a new advertising campaign in 2023. Titled HELLO, the campaign aims to increase awareness of North Dakota as a travel destination and inspire trip planning, referrals to partners and booked trips.

In 2023, \$3.6 million was invested in paid advertising for North Dakota. This was a 20% decrease from 2022 when EDA grants reinforced the budget. According to Arrivalist attribution tracking, advertising made the largest impact in increasing arrivals from Montana and Colorado.

To view the campaign, visit NDtourism.com/information/advertising-campaign

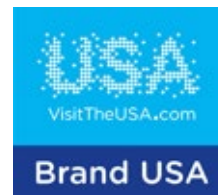


EXPANDING PARTNER REACH

Cooperative advertising programs were utilized by 13 marketing organizations in-state, extending marketing dollars and providing opportunities to reach more consumers. Odney managed seven paid ad programs with \$24,000 matching dollars to buoy partner efforts. The efforts netted 3.9 million partner impressions with 21,600 click conversions.

The HELLO campaign also laid a foundation for the Department of Commerce's talent recruitment initiative. Several efforts were co-branded with Find the Good Life in North Dakota inviting the audience to visit, explore and consider relocating to North Dakota. In 2023, more than 3,600 visitors of NDtourism.com further accessed online information about jobs and relocation to North Dakota.

MARKETING PARTNERSHIPS AMPLIFIED MEDIA SPEND



CAMPAIGN RESULTS

PAID IMPRESSIONS
379 million

DIGITAL AD CLICK-THROUGHS TO WEBSITE
INCREASED **19.2%**

VIDEO COMPLETIONS
18.91 million

TRAVEL GUIDES
DISTRIBUTED
203,000+

EBOOK PAGEVIEWS
64,500+

PAID VIDEO CONVERSIONS
TO WEBSITE
INCREASED **328%**



VISITATION PERFORMANCE

Visitation	+15%
Border Crossings	+47%
National Park Visitation	+11%
Air Arrivals	+11%
Hotel Occupancy	+6.7%

REACH

TV/RADIO
76,569,825

Broadcast and cable impressions were decreased in order to shift budget into connected, over-the-top and streaming video.

PRINT/OUT-OF-HOME
157,467,085

While print circulations decreased, North Dakota got a major boost in impressions from value-added exposure with the wrapped train in Chicago.

DIGITAL
130,690,248

This 20% increase in impressions was strategically chosen to meet consumer behavior.

SOCIAL MEDIA
14,270,000

Campaign efforts on social media focused on Facebook and YouTube. YouTube click-through performance was 4x the industry average.

Public & Media Relations

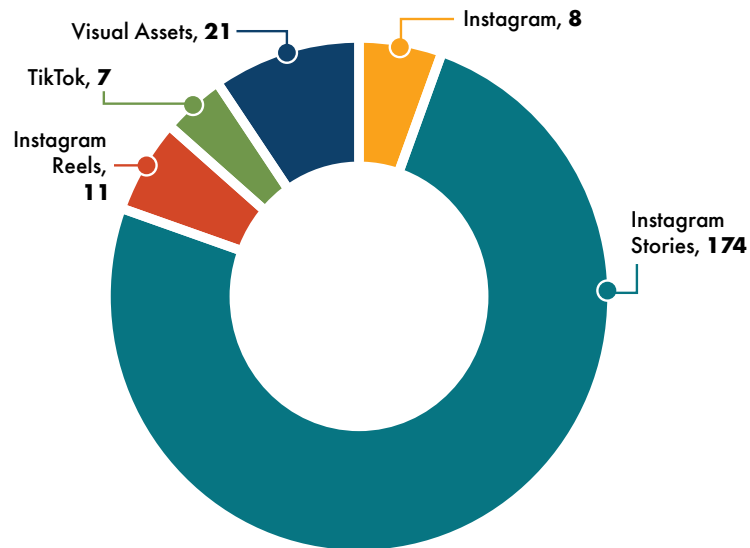
Public and media relations efforts continued to elevate North Dakota's image through proactive outreach and storytelling garnering positive media coverage and increasing awareness.



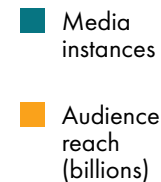
6. Fluffy Fields Winery

Fluffy Fields is a family-owned and operated winery featuring grapes and fruit grown in their vineyards, orchards, and gardens. Enjoy daily wine tastings, take a guided tour of their vineyard, or wander around on your own. And if you're hungry, enjoy charcuterie boards, sandwiches, and pizza.

2023 PARTNER RESULTS



EARNED MEDIA RESULTS



2023 MEDIA COVERAGE

MEDIA INSTANCES

2,444

AUDIENCE REACH THROUGH MEDIA

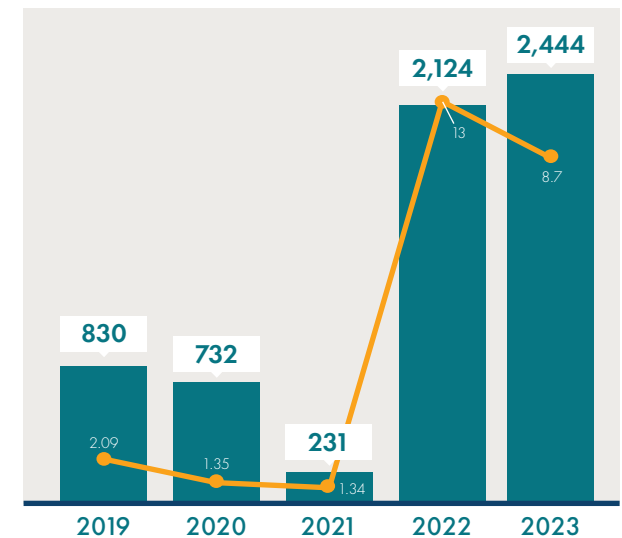
8.7 billion

INFLUENCER CAMPAIGN

AUDIENCE REACH – **778,445**

IMPRESSIONS – **1,742,690**

SOCIAL MEDIA ENGAGEMENTS – **398,151**



NORTH DAKOTA TOURISM'S STORIES WERE SEEN BY MORE PEOPLE THAN THE POPULATION OF LOS ANGELES, NEW YORK CITY, AND CHICAGO COMBINED, PROVING ITS LEGENDARY EXPERIENCES REACHED FAR BEYOND ITS BORDERS.

Social Media



171,753 FOLLOWERS

↑ 7% increase



2,158,443 ENGAGEMENTS

↑ 115% increase



40,020,074 IMPRESSIONS

↑ 85% increase



96,152 WEB TRAFFIC

↑ 28% increase

Social media gives us worldwide platforms to showcase North Dakota. It allows us to build an engaged fan base, provide travel counseling, generate traffic to the website, and offer educational opportunities to residents and visitors about activities, communities, people and attractions in our state.

MOST ENGAGING STORIES

These content pieces generated the most interest from fans around the state and country.



NATURAL BEAUTY



EVENTS



SMALL BUSINESS



North Dakota's social media magic reached 52 times the state's population, garnering **40 million impressions**, 85% more than 2022, proving that legendary stories resonate far and wide!



North Dakota Tourism's social media inspired **2.1 million engagements** (115% over 2022). That's like getting a "hello" from every North Dakotan almost three times over.



Facebook and Instagram are North Dakota Tourism's most engaging social platforms. This is represented by engagement rate - the number of interactions social content receives per follower.

2023 average Facebook engagement rate: 5%
4.3 times the industry average

2023 average Instagram engagement rate: 6.7%
3.8 times the industry average

SOCIAL HIGHLIGHTS



115%

Increase in engagements



85%

Increase in impressions

FOLLOW US



@TravelND



@NorthDakotaLegendary



@NDTourism



@NorthDakota



@TravelND

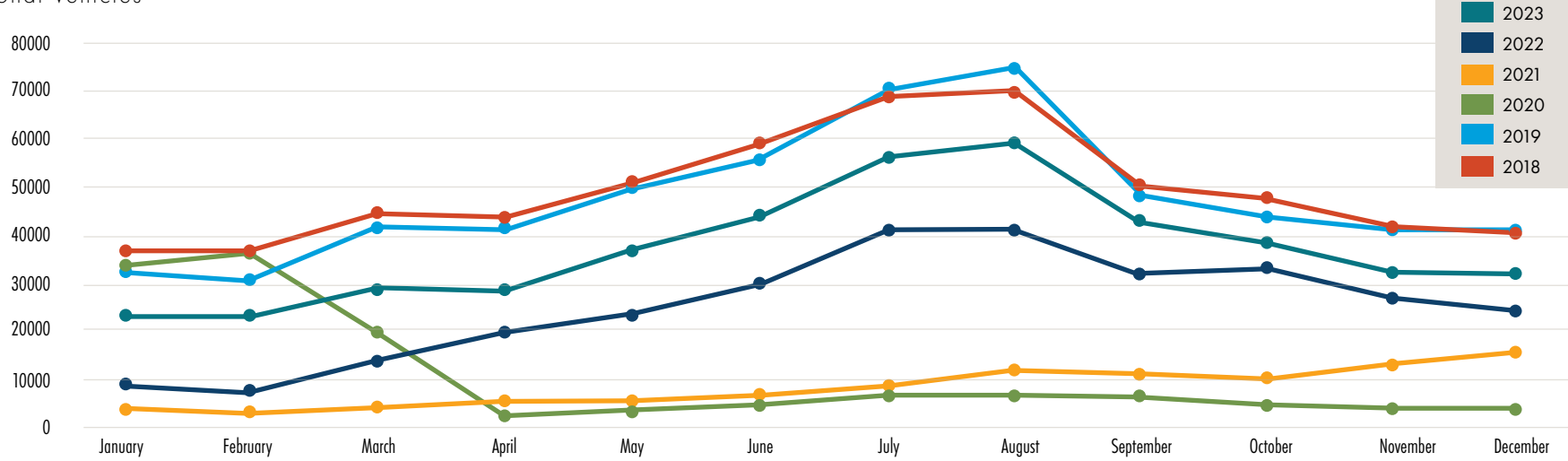


@NorthDakotaLegendary

By the Numbers

CANADA BORDER CROSSING INTO NORTH DAKOTA

Personal Vehicles



NORTH DAKOTA TRAVEL INDUSTRY

TRAVEL SEGMENT	2022	2023	+/-
State Park Visitors	1,135,538	*N/A	*N/A
National Park Visitors	698,119	775,490	11%
Major Attractions	4,112,052	4,793,135	17%
Local Visitor Centers	49,994	43,269	-13%
Cumulative Lodging Tax	\$7,350,904	\$8,529,582	16%
ND Airport Deplanements	1,023,816	1,137,485	11%
Canadian Border Crossing	298,463	439,866	47%
Statewide Hotel Occupancy Rate	54.0%	57.6%	7%

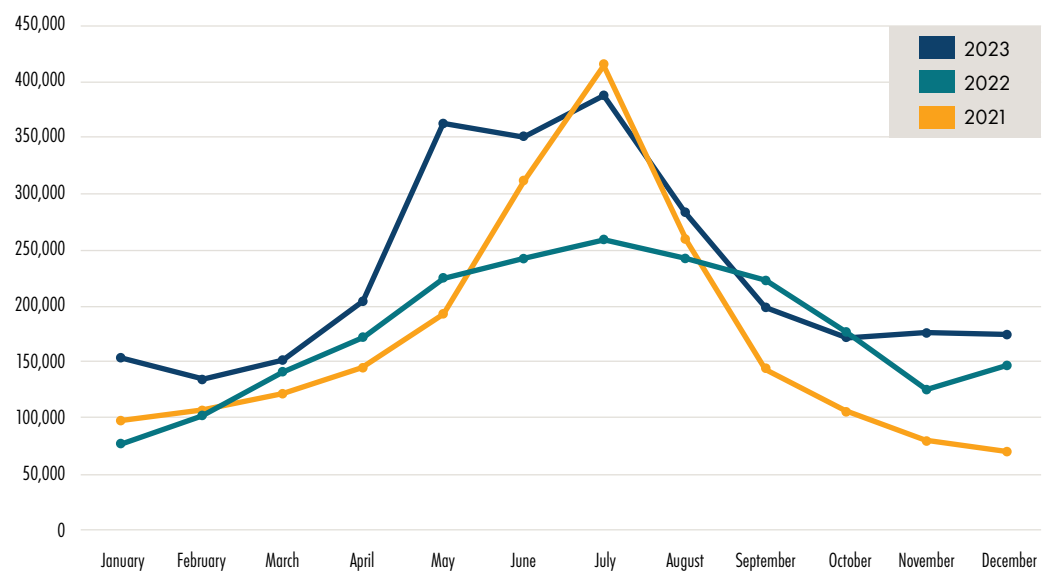
*Not available at time of print 4/1/24

TAXABLE SALES & PURCHASES

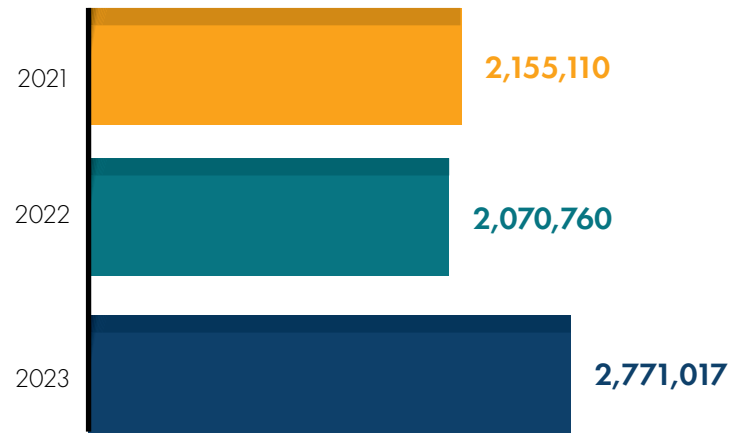
ACCOMMODATIONS/FOOD SERVICES		
2022	2023	+/-
\$2,021,271,778	\$2,157,789,994	6.75%

ARTS, ENTERTAINMENT & RECREATION		
2022	2023	+/-
\$151,617,794	\$167,006,812	10.15%

TOTAL WEB VISITS BY MONTH



TOTAL WEB VISITS BY YEAR

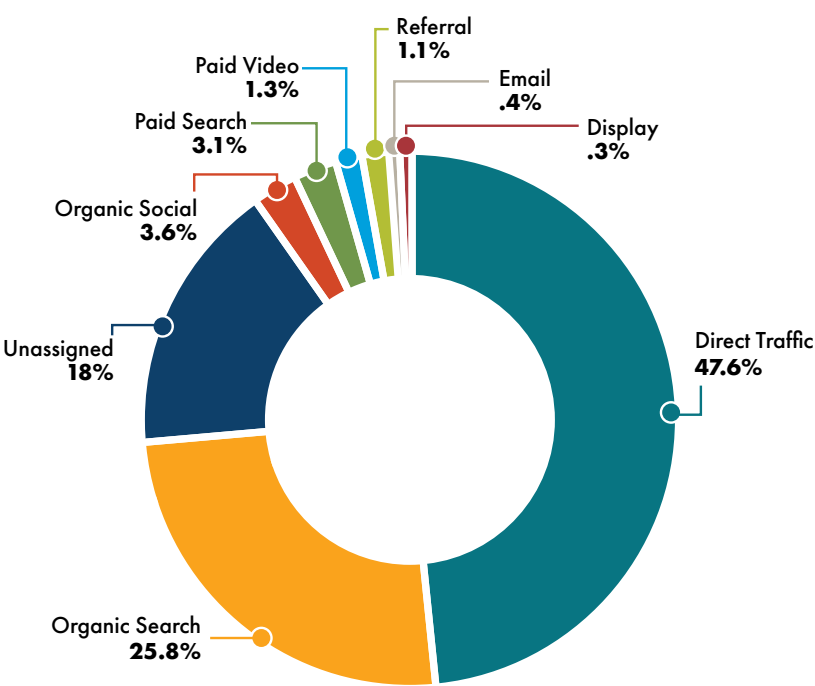


TOP LOCATIONS FOR WEBSITE TRAFFIC

RANK	LOCATION
1	Kansas
2	Illinois
3	North Dakota
4	Minnesota
5	Michigan
6	Texas
7	Florida
8	Wisconsin
9	Colorado
10	California

Kansas is showing as #1 website traffic location, however, Coffeyville, Kansas is the geographical center of the contiguous United States. This location, similar to (not set), is also used in Google Analytics when Google can't identify a website visitor's precise location from their IP address.

ORIGIN OF SITE TRAFFIC



Global Marketing

International markets are still striving to return to their 2019 levels. Returning to face-to-face meetings, trade events and continuity helps North Dakota grow in the marketplace.

- North Dakota was added as a destination in 32 new itineraries with 140 new overnights across the seven international markets.
- 138 tour operators.
- 1,585 overnights with an increase of 312.
- 30 communities featured!
- 207 shareable leads were generated from IPW, International Roundup, IITA and Brand USA Travel week in 2023, along with 135 from mission to Italy and mixed mission to Switzerland and the Netherlands.
- Hosted five media individual Fams. These media visited 15 communities and spent 23 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 NDNTA continues to build awareness of the Tribes located within the State to people from around the world. They have been represented at IPW, IRU, Go West and have hosted national officials from the U.S. Department of the Interior and Department of Commerce. NDNTA was well represented at the Inaugural Indigenous Leadership Lecture Series hosted by George Washington University International Institute of Tourism Studies and the Indigenous Tourism Collaborative of the Americas. The North Dakota Native Tourism Alliance was referenced as a model for all Tribal groups by every speaker as the leader of the Tribal alliances.

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

GROUP TRAVEL

Sales missions are topped with organization, collaboration, inspiration, and vision. It is uniting North America travel markets with North Dakota's partners in travel for the purpose of creating new product in our state. Our partners are essential for welcoming visitors into their communities.

In 2023, over 400 Canadian travel industry professionals attended the first Brand USA & Collette sales missions in Winnipeg, MB, Edmonton and Calgary, AB. Key dignitaries, tour and motorcoach operators, travel agencies, media and other travel businesses were met with and itinerary options, maximizing experiences were discussed and community contacts for developing partnerships to generate travel to North Dakota were exchanged.

This first Brand USA and Collette Travel provided introductions and have reignited the passion for travel to North Dakota and to develop and work with communities across the state. We are looking forward to more sales missions to Canada and sharing the possibilities with our partners.

NORTH DAKOTA WAS
FEATURED IN
265 STORIES
AND REACHED
72M READERS
AND EARNED AN
EQUIVALENT OF
\$5.3M
IN EDITORIAL COVERAGE

OVERNIGHTS
OFFERED IN THE STATE
WERE INCREASED
24%
FROM 2022, WITH A
REGIONAL MARKET
SHARE INCREASE OF
16.9%



Outdoor Marketing Program

North Dakota sponsored and hosted Heliconia Productions for filming and photographing an episode of Epic Trails. Featured locations included Theodore Roosevelt National Park, the Maah Daah Hey Trail, and Lake Sakakawea.

The episode titled “North Dakota Backpacking Adventure” from Epic Trails Season 6, Episode 7, aired on PBS, Backpacking TV, and various online platforms.

Year-to-date metrics for Heliconia sponsorship are as follows:



147 AIRINGS



3.9M VIEWERSHIP



\$398,048 MEDIA
VALUE

IMAGINE KAYAKING A MILE OF SCENIC LAKE SAKAKAWEA IN NORTH DAKOTA EQUALS ONE VIEWER - YOU'D NEED TO PADDLE THE ENTIRE LENGTH OF THE 178-MILE RESERVOIR A WHOPPING 21,910 TIMES TO MATCH THE 3.9 MILLION VIEWERS NORTH DAKOTA'S PARTNERSHIP WITH HELICONIA REACHED - TALK ABOUT REACHING NEW AUDIENCES!

MARKETING

Hunting & Fishing TV

- Ron Schara Productions
- Jason Mitchell Outdoors
- Midwest Outdoors
- Linder Media Angling Buzz

Print

- On Wisconsin Outdoors
- Ducks Unlimited
- Delta Waterfowl
- National Parks Magazine
- Mountain Bike Action Magazine

MEDIA RELATIONS

Participated in the Association of Great Lakes Outdoor Writers Conference held in Bemidji, MN in September. Mike Jensen, Tourism Outdoor Recreation Manager, conducted one-on-one meetings to present North Dakota story ideas to 35 qualified outdoor media at AGLOW.

Hosted John Bumpus from Outsider Magazine to produce a winter camping piece for that publication.

SPORT SHOWS

To promote the state's outdoor adventures direct to consumers, Tourism exhibited at the Northwest Sport Show in March in Downtown Minneapolis. North Dakota Tourism was able to promote travel face-to-face with just over 700 potential travelers.

Tourism Destination Development



AGRITOURISM

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

North Dakota Department of Commerce recognizes that tourism destination 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 of 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.

Tourism development worked with new and existing businesses across the state. These offerings included 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.



Governor Doug Burgum, recognizing the importance of tourism destination development, recommended a \$50 million appropriation for a Destination Development Grant Program, and the 68th Legislative Assembly approved \$25 million. As a result, the grant program was created, and 81 applications varying in scope and visitor appeal were submitted for the grant. Our team continues to work with applicants to develop and expand tourism offerings across the state.

Commerce's Economic Development and Finance Division and the Tourism Division continued to work on additional financial package opportunities for tourism business recruitment and expansion through tourism primary sector certification. Four applicants were certified tourism primary sector in 2023.

THE DESTINATION DEVELOPMENT GRANT

The Destination Development Grant Program was designed to support new and expanded destination attractions, resulting in new or improved experiences for visitors and residents across North Dakota.

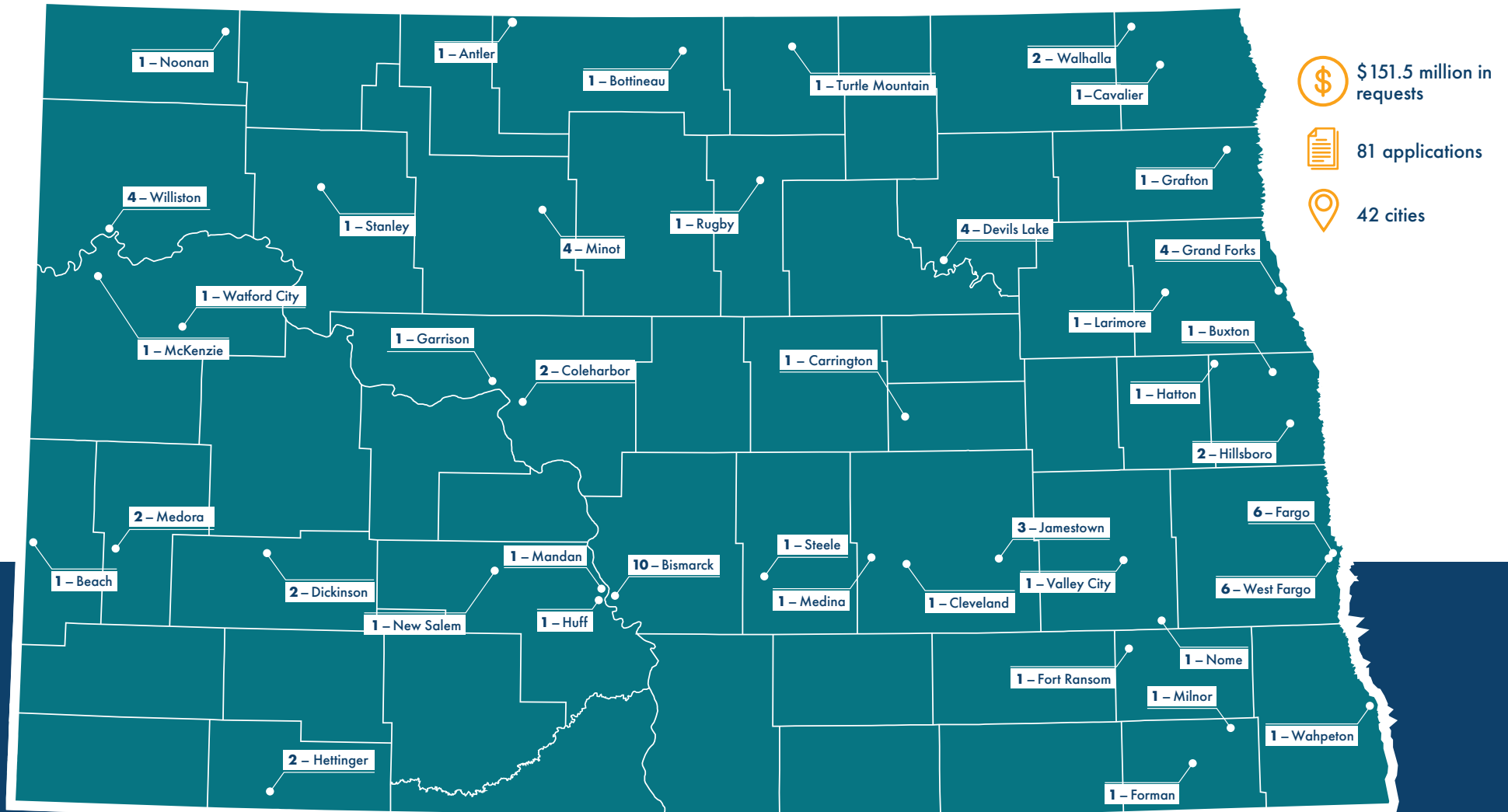
List of Recipients:

- Arrowhead Lodge at Indian Hills
- Bison World
- Bottineau Winter Park Snow Making
- Brews, Chews, and Views in Minot
- Dickinson Museum Center Expansion Project
- Frost Fire Park
- Huff Hills Ski Area
- Riverfront Festival Grounds
- Scott Moser, Hunting & Fishing Lodge and Resort with Birding Trails
- The Theodore Roosevelt Presidential Library
- Thrill Hills
- Turtle Mountain Comprehensive Tourism Plan
- Western Heritage
- Woodland Resort Guest Center

\$25 million awarded to grow and expand tourism offerings in North Dakota.

2023 DESTINATION DEVELOPMENT GRANT APPLICATIONS

The applications varied considerably in scope and appeal to unique visitor segments. New and expanded destination experiences will not only attract visitors but also improve our quality of life and workforce recruitment efforts.



Grant application projects varied considerably, appealing to various visitor sectors.



Lake resorts



Accommodations



Multi-faceted venues



Museums



Activities



Rentals



Entertainment



Outdoor recreation



Amenities



New and enhanced complete attraction experiences

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 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.

2023 Highlights



More than 220 Tourism Professionals attended the 2023 Travel Industry Conference in Bismarck.



A total of 15 partners participated in 11 different coop advertising opportunities.



Commerce newsletter had an engagement rate of 53% in 2023. Total subscribers had a growth of 28% over the past 12 months with over 32,000 subscribers.



More than 70 tourism professionals attended the 2023 Tourism Industry Marketing Summit.

3,400+

PARTNER LISTINGS
ON WEBSITE

1,650+

PARTNER LISTINGS IN
TRAVEL GUIDE

265,000+

REFERRALS TO
PARTNER WEBSITES



STATE MEDIA LIBRARY



21,376

DOWNLOADS (system-wide)



10,677

UPLOADS (system-wide)



98,647

ASSETS (system-wide)

Most downloaded assets included: TRNP (scenic, winter, wildlife), teams backgrounds, sunflowers, North Dakota Capitol, Pembina Gorge, Crow Flies High/Lake Sakakawea, Medora Musical, Killdeer Mtn Four Bears Scenic Byway, Little Missouri National Grasslands, Fort Abraham Lincoln State Park, Icelandic State Park.

Most viewed assets included: Sunflowers, Crow Flies High/Lake Sakakawea, Bismarck Railroad Bridge, North Dakota Capitol, Highway 5 Itinerary, Sweet Briar Lake, North Dakota Travel Guide, Fort Abraham Lincoln State Park, TRNP (wildlife, winter, family fun, etc.), Bismarck/Mandan "Ask a Local" video, Red Door Art Gallery.

Because of the GA4 (Google Analytics) conversion, only data from April–December is available. In that time-frame, more than 1,400 users accessed the system. Average engagement time is 27:39.

Visitor Services & Sales

The Tourism and Marketing Division plays a crucial role in promoting destinations and attracting visitors. One of their key responsibilities is to create information pieces that serve various purposes, such as fulfilling content on the website, providing resources at visitor centers, and offering information at rest areas. Here's how these information pieces can be utilized effectively in each context:

Brochures

Digital versions of brochures can be uploaded to the website for visitors to download or view online. These brochures can highlight key attractions, activities, and accommodations.

Interactive Maps

North Dakota Tourism has created interactive maps and more than 30 itineraries that allow visitors to explore different regions, attractions, and amenities. Include points of interest, hiking trails, historical sites, and other relevant locations.

Rest Area Partnerships

Collaborate with partners and attractions to showcase their offerings at rest areas through their brochures.

By leveraging these information pieces effectively across the website, visitor centers, and rest areas, the Tourism and Marketing division can enhance the overall visitor experience, promote tourism activities, and contribute to the economic growth of the state. Individuals that take brochures gain knowledge on area attractions, events and amenities. Travelers are able to experience more and spend more time in destination increasing the economic impact of each visitor.

REST AREA PARTNERSHIPS

110 different rest area program partner brochures were displayed and distributed at 15 sites across North Dakota.

2023 Rest Area Distribution Numbers



33,165

2023 TRAVEL
GUIDES



66,500

2023 HIGHWAY
MAPS



16,200

2023 HUNTING &
FISHING GUIDES

LIVE CHAT TRAVEL COUNSELING



470 LIVE CHATS

Online travel counselors have responded to **470** live chats with potential North Dakota visitors.



1,500 INQUIRIES

In 2023, the BOT handled **over 1,500** inquiries by potential visitors. The BOT was able to answer questions on campgrounds, lodging, attractions and events, travel guide, seasonal and outdoor recreation, Canadian border and general North Dakota information.

NORTH DAKOTA GUIDE DISTRIBUTION



265,000+

REFERRALS TO PARTNER
WEBSITES



203,000+

TRAVEL GUIDES DISTRIBUTED
- **33,165** THROUGH
REST AREAS

Industry At A Glance

SALES



\$3.55 BILLION

IN TRAVEL SPENDING IN 2023



9.7 MILLION

IN VISITOR SPENDING PER DAY



5,380,651

HOTEL ROOM NIGHTS SOLD
(7.2% INCREASE FROM 2022)

REVENUE



\$2.3 BILLION

IN TAXABLE SALES



\$531,324,672

ROOM NIGHT SALES

JOBS



43,877

AVERAGE ANNUAL EMPLOYMENT



3,011

INDUSTRY BUSINESSES



MORE THAN

\$1 BILLION

IN ANNUAL WAGES

\$3.55 BILLION
IN TRAVEL SPENDING

36% increase from 2021

1,137,485
AIRPORT ARRIVALS

11.1% increase from 2022

298,463
BORDER ENTRIES
FROM CANADA

47.3% increase from 2022

NORTH
Dakota | Tourism & Marketing
Be Legendary. COMMERCE

1600 E CENTURY AVE., SUITE 6
BISMARCK, ND 58502-2057
1-800-435-5663
WWW.INDTOURISM.COM



@TravelND



@NorthDakota



@NorthDakotaLegendary



@TravelND



@NDTourism



@NorthDakotaLegendary