

2024

Economic Impact of Visitors to North Dakota



CONTENTS

Introduction

Key Findings

Results in Context

Visitor Volume and Spending

Economic Impact Methodology

Economic Impact

County Spending and Impacts

Appendix



Introduction

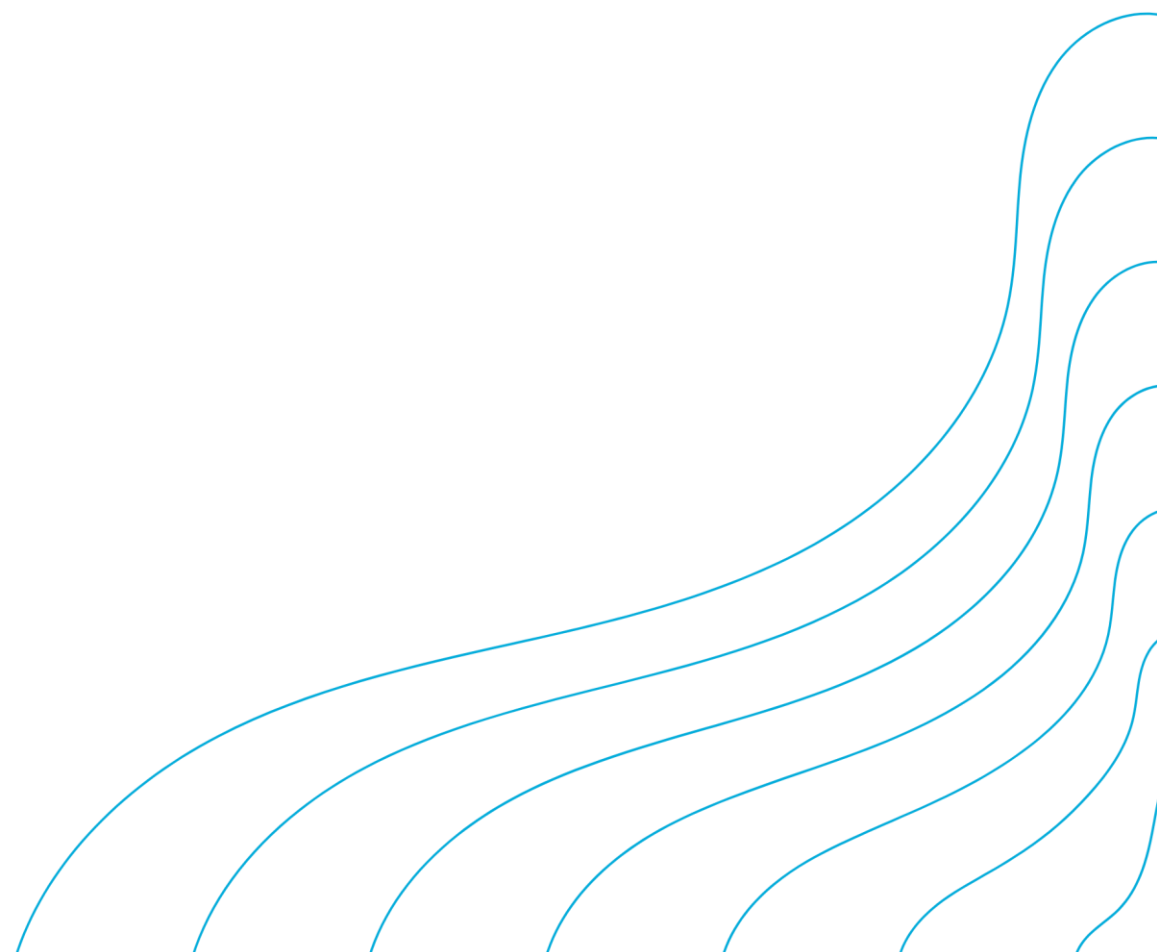
Visitors are integral to North Dakota's economy, generating significant financial benefits for residents and local businesses. Visitor activity and tourism investment also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of North Dakota's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending, as well as tourism-related capital investment and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

KEY FINDINGS



Key Findings

Visitors Generate Massive Economic Impact

In 2024, **26.3 million visitors** spent **\$3.4 billion** in North Dakota's economy in 2024, an increase of 2.7% and 2.5%, respectively, over the prior year



26.3M VISITORS TO NORTH DAKOTA



\$3.4B VISITOR SPENDING



\$5.7B TOTAL ECONOMIC IMPACT



\$1.4B TOTAL PERSONAL INCOME



40.1K TOTAL JOBS SUPPORTED



\$310.6M STATE AND LOCAL TAXES



Results in Context

The visitor economy is an economic pillar in North Dakota. In 2024, visitor spending supported one-in-15 jobs in North Dakota.



\$3.4B VISITOR SPENDING

Visitors spent \$10.3 million per day, on average, in North Dakota.



\$1.4B PERSONAL INCOME

This is the equivalent of \$4,300 per resident household, regardless of any connection to the visitor economy.



40,054 JOBS

The visitor economy sustained 6.5% of all jobs in North Dakota. These employees could fill the entirety of the Fargodome 2.1 times.

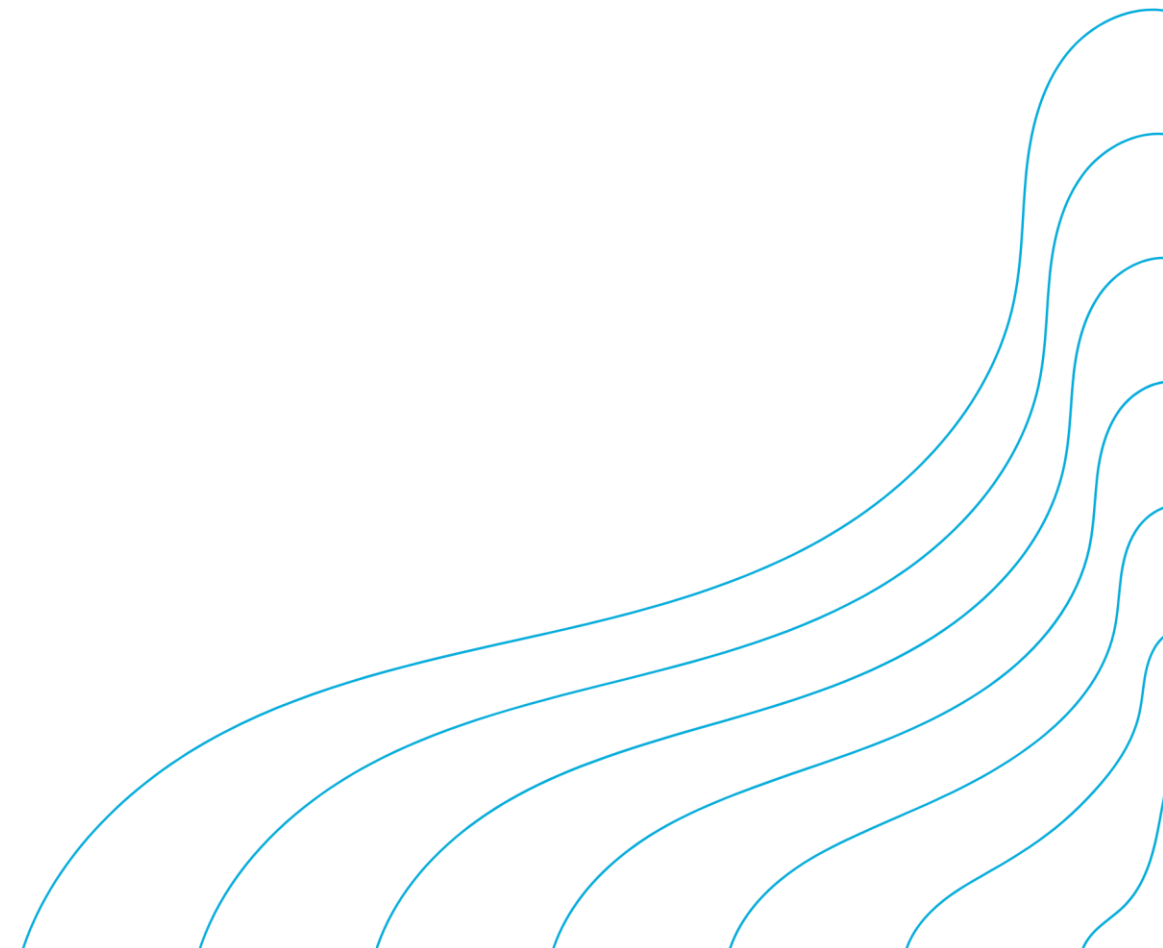


\$310.6M STATE & LOCAL TAXES

Each household in North Dakota would need to be taxed an additional \$935 to replace the visitor-generated taxes received by state and local government in 2024.



VISITOR VOLUME & SPENDING



North Dakota welcomed **26.3 million** visitors who spent **\$3.4 billion** in 2024.



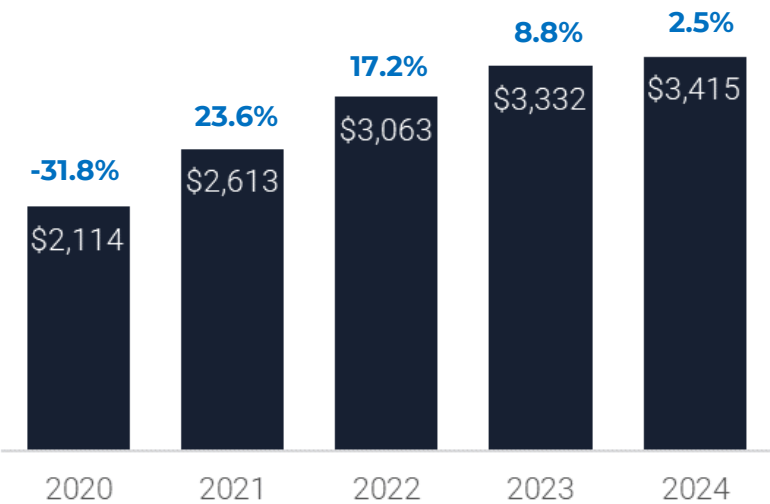
Visitor Spending

Visitor spending increased 2.5% to \$3.4 billion in 2024.

Of the \$3.4 billion spent, food and beverage accounted for \$987 million—29% of all visitor spending.

Visitors spent 20% of their budget on retail purchases.

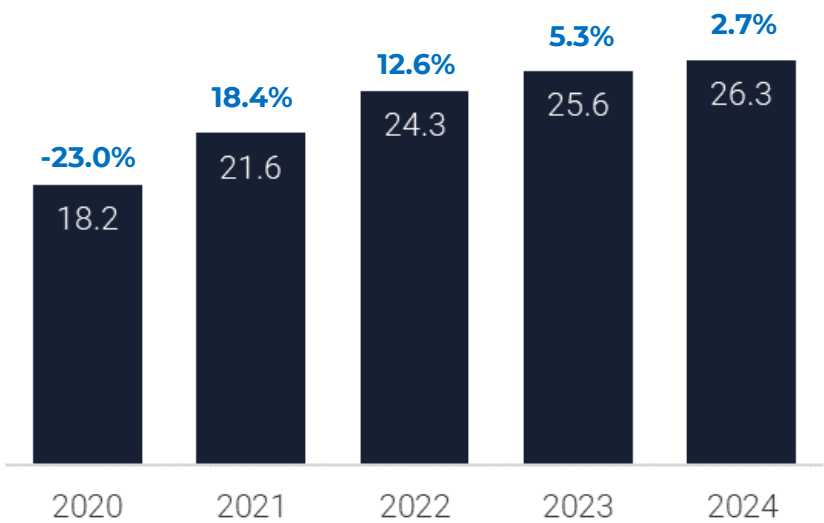
North Dakota Visitor Spending
\$ millions



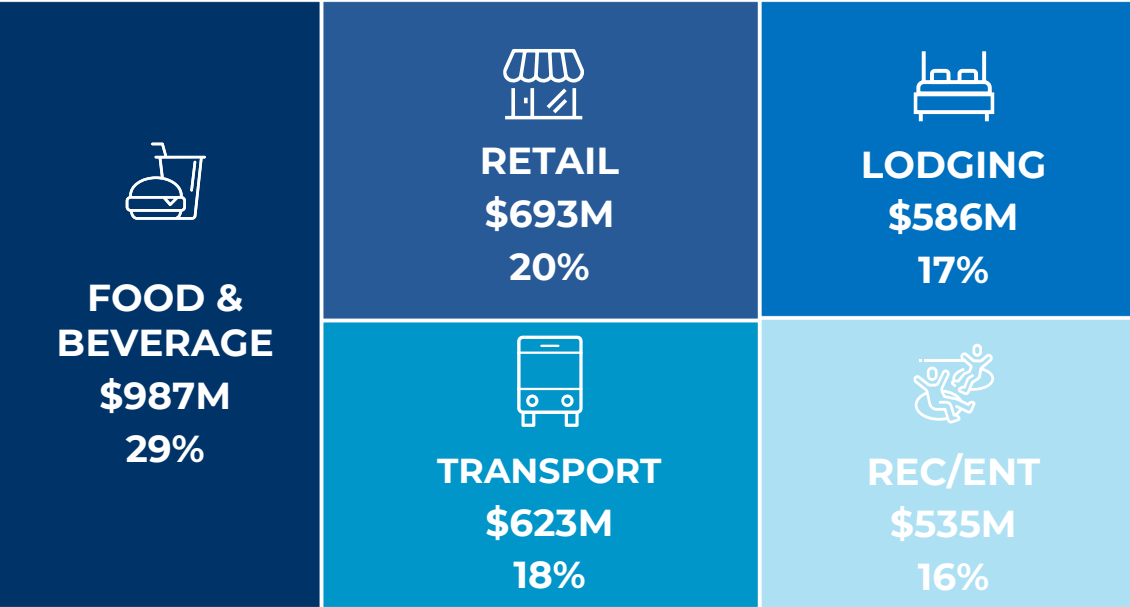
Visitor Volume

In 2024, 26.3 million visitors traveled to North Dakota, a moderate increase over the prior year (+2.7%). Both day visits and international arrivals drove growth, increasing 3.3% and 4.1%, respectively.

North Dakota Visitor Volume
millions



Source: Tourism Economics



Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Visitor Volume and Spending Trends

Visitor spending increased 2.5% in 2024, a result of moderated demand as price growth cooled.

Recreation led spending growth in 2024, increasing 5.8% year-over-year. Growth in food and beverage purchases followed, increasing 3.1%.

Spending from overseas arrivals increased 16.7% over the prior year, though this segment has not yet fully recovered to pre-pandemic levels.

North Dakota Visitor Spending and Annual Growth

\$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total visitor spending	\$2,114	\$2,613	\$3,063	\$3,332	\$3,415	2.5%
Food & beverage	\$637	\$768	\$882	\$949	\$978	3.1%
Retail	\$467	\$565	\$638	\$675	\$694	2.8%
Transportation	\$422	\$521	\$603	\$631	\$623	-1.1%
Lodging	\$289	\$384	\$488	\$572	\$585	2.2%
Recreation	\$298	\$375	\$451	\$506	\$535	5.8%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

North Dakota Visitor Volume, By Segment

millions of visitors, \$ millions, \$ per visitor

	2020	2021	2022	2023	2024	2024 Growth
Total visitors	18.2	21.7	24.3	25.6	26.3	2.7%
Day	12.9	15.2	16.9	17.8	18.4	3.3%
Overnight	5.3	6.5	7.4	7.8	7.9	1.3%
Total visitor spending	\$2,114	\$2,613	\$3,063	\$3,332	\$3,415	2.5%
Day	\$1,209	\$1,441	\$1,627	\$1,742	\$1,802	3.4%
Overnight	\$905	\$1,172	\$1,436	\$1,590	\$1,613	1.5%
Per visitor spending	\$116	\$120	\$126	\$130	\$130	-0.2%
Day	\$94	\$95	\$96	\$98	\$98	0.1%
Overnight	\$170	\$180	\$194	\$203	\$204	0.2%

Source: Tourism Economics

North Dakota International Visitor Volume, By Market

thousands of visitors, \$ millions

	2020	2021	2022	2023	2024	2024 Growth
International Visitors	127	190	281	435	453	4.1%
Canada	113	177	262	407	422	3.6%
Overseas*	15	14	19	28	32	11.8%
Total Spending	33	31	90	125	129	3.3%
Canada	12	8	65	83	80	-3.5%
Overseas*	21	23	25	42	49	16.7%

Source: Tourism Economics

*Overseas visits and spending include Mexico

Visitor Economy Trends

The visitor economy looks at a broader range of tourism-related expenditures. These include government support for tourism as well as capital investment (both new structures and machinery and equipment spending).

Overall, visitor economy spending in 2024 neared \$3.8 billion, led by domestic traveler spending at \$3.3 billion. Capital investment in support of tourism totaled \$254 million in 2024.

Tourism Capital Investment

\$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total Tourism CAPEX	\$179	\$188	\$220	\$373	\$254	-31.9%
Machinery & equip.	\$88	\$108	\$127	\$136	\$138	1.6%
Construction	\$91	\$80	\$93	\$237	\$116	-51.2%

Sources: Tourism Economics, Oxford Economics

Visitor Economy Distribution

In North Dakota, the international visitor market increased its share to 3.4% of tourism demand in 2024; up from 3.3% in 2023.

Capital investment in tourism-related construction and machinery & equipment represented 6.8% of all tourism-related demand.

Domestic visitor markets remained the largest category, providing 87.5% of demand in 2024.

The governmental support share was 1.5% of the North Dakota visitor economy in 2024.

North Dakota Visitor Economy

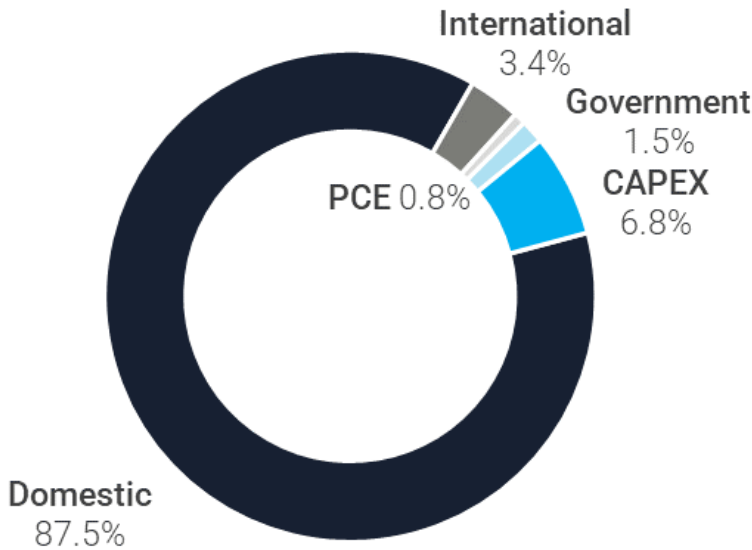
\$ millions

	2020	2021	2022	2023	2024	2024 Growth
Tourism Demand	\$2,362	\$2,878	\$3,363	\$3,791	\$3,757	-0.9%
Domestic Visitor	\$2,081	\$2,582	\$2,973	\$3,208	\$3,286	2.5%
International Visitor	\$33	\$31	\$90	\$125	\$129	3.3%
Non-visitor PCE	\$24	\$27	\$27	\$28	\$30	4.2%
Governmental Support	\$46	\$50	\$53	\$57	\$58	1.7%
Capital Investment	\$179	\$188	\$220	\$373	\$254	-31.9%

Sources: Tourism Economics, Oxford Economics

North Dakota Visitor Economy

Percent distribution



Sources: Tourism Economics, Oxford Economics

ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

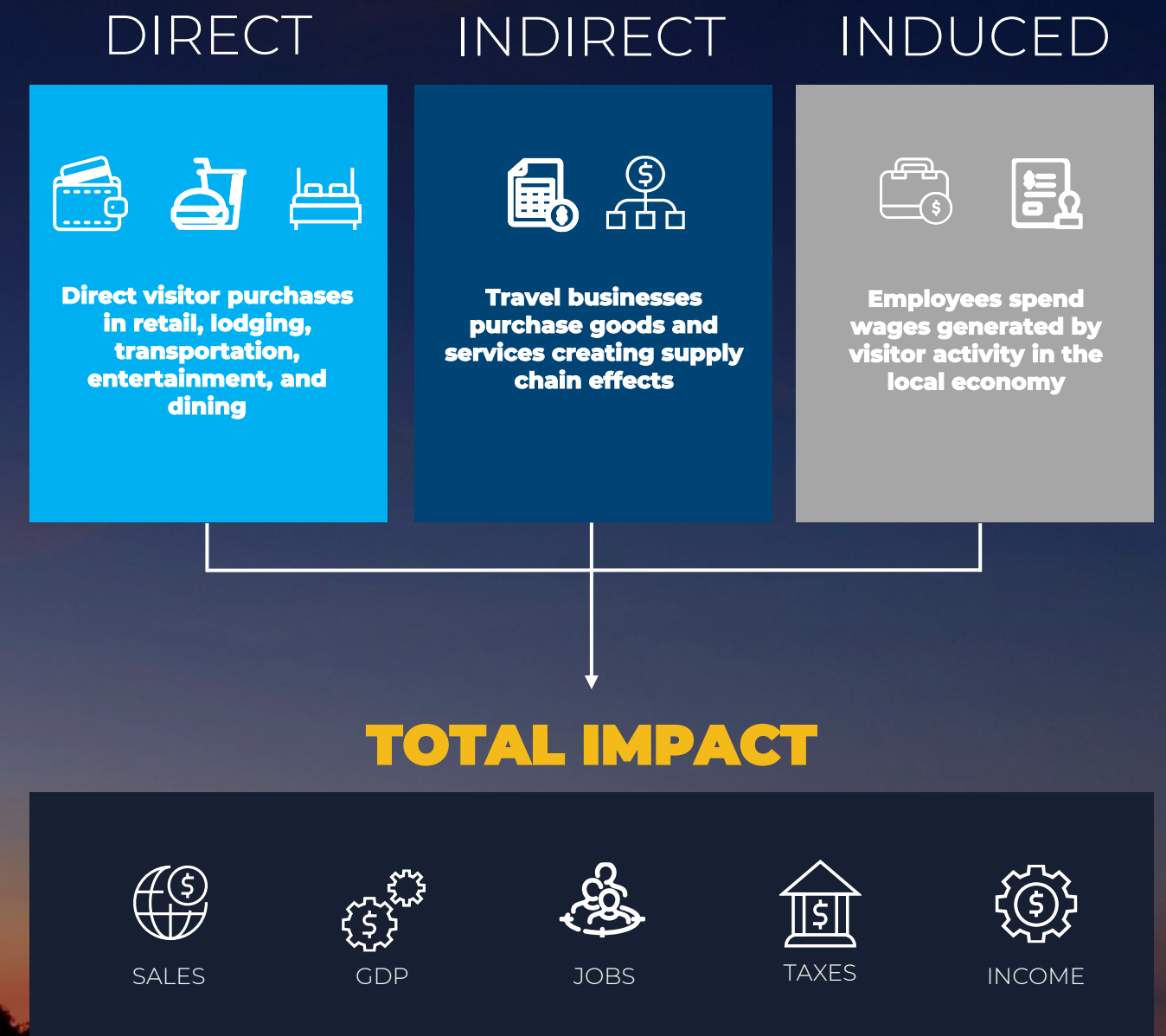
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitors through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

- Spending
- GDP
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Model

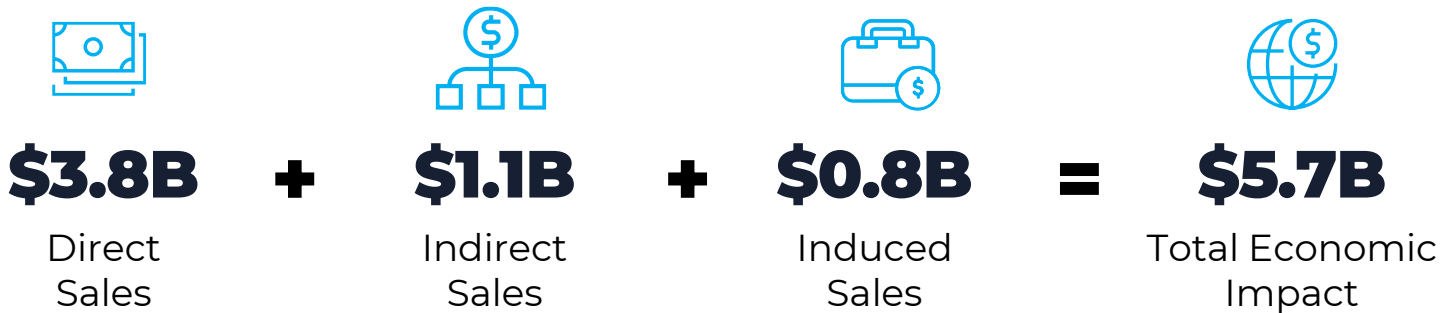


ECONOMIC IMPACT



Business Sales Impacts

Direct business sales, including visitor spending and TSA spending, tallied \$3.8 billion in North Dakota in 2024. These direct impacts generated an additional \$1.9 billion through supply chain (indirect) and income (induced) effects. As a result, the total economic impact of visitors reached \$5.7 billion in 2024.



Business Sales by Industry (2024)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$3,757	\$1,098	\$798	\$5,653
Food & Beverage	\$880	\$39	\$62	\$981
Retail Trade	\$819	\$24	\$69	\$913
Finance, Insurance, Real Estate	\$89	\$369	\$214	\$673
Lodging	\$543	\$0	\$0	\$543
Recreation and Entertainment	\$468	\$26	\$10	\$504
Gasoline Stations	\$476	\$1	\$6	\$484
Construction and Utilities	\$254	\$113	\$34	\$401
Business Services	\$10	\$180	\$45	\$235
Education and Health Care		\$3	\$179	\$182
Personal Services	\$57	\$32	\$45	\$134
Other Transport	\$48	\$56	\$21	\$125
Wholesale Trade		\$75	\$40	\$115
Government	\$58	\$28	\$14	\$100
Communications		\$71	\$26	\$97
Manufacturing	\$2	\$57	\$18	\$77
Air Transport	\$52	\$1	\$2	\$55
Agriculture, Fishing, Mining		\$23	\$11	\$34

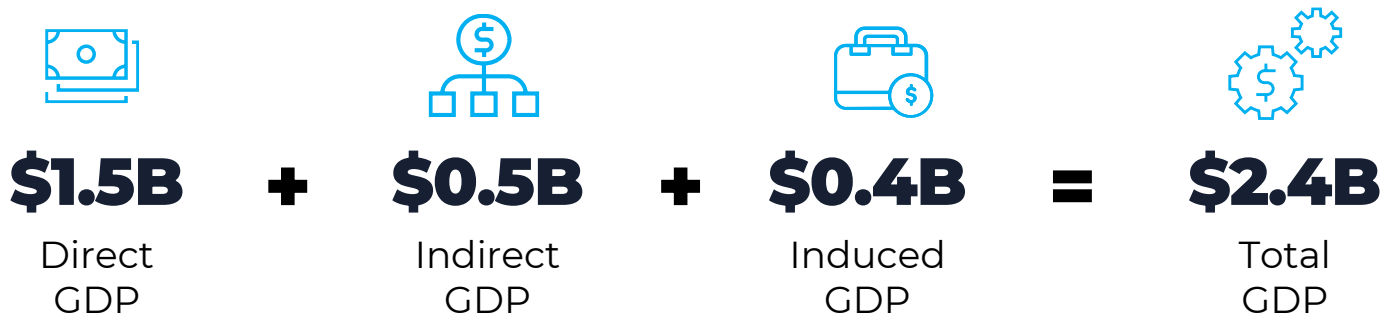
Source: Tourism Economics

The total economic impact of **\$5.7 billion** accrued to industries across the economy.



GDP (Value Added Impacts)

North Dakota visitor economy GDP reached \$2.4 billion in 2024. This represented 3.2% of North Dakota’s economy. GDP removes the value of all imported (from other states and internationally) goods and services.



GDP by Industry (2024)

\$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$1,525	\$482	\$429	\$2,436
Food & Beverage	\$449	\$12	\$27	\$488
Lodging	\$341	\$1	\$1	\$342
Finance, Insurance, Real Estate	\$15	\$148	\$139	\$301
Recreation and Entertainment	\$271	\$7	\$6	\$284
Retail Trade	\$160	\$14	\$37	\$211
Construction and Utilities	\$118	\$40	\$13	\$172
Business Services	\$8	\$106	\$26	\$139
Education and Health Care		\$1	\$96	\$96
Other Transport	\$34	\$26	\$9	\$69
Personal Services	\$21	\$22	\$25	\$68
Wholesale Trade		\$37	\$22	\$59
Gasoline Stations	\$37	\$1	\$3	\$41
Air Transport	\$38	\$0	\$1	\$39
Government	\$28	\$9	\$1	\$38
Communications		\$22	\$13	\$36
Agriculture, Fishing, Mining		\$20	\$8	\$27
Manufacturing	\$5	\$16	\$4	\$26

Source: Tourism Economics

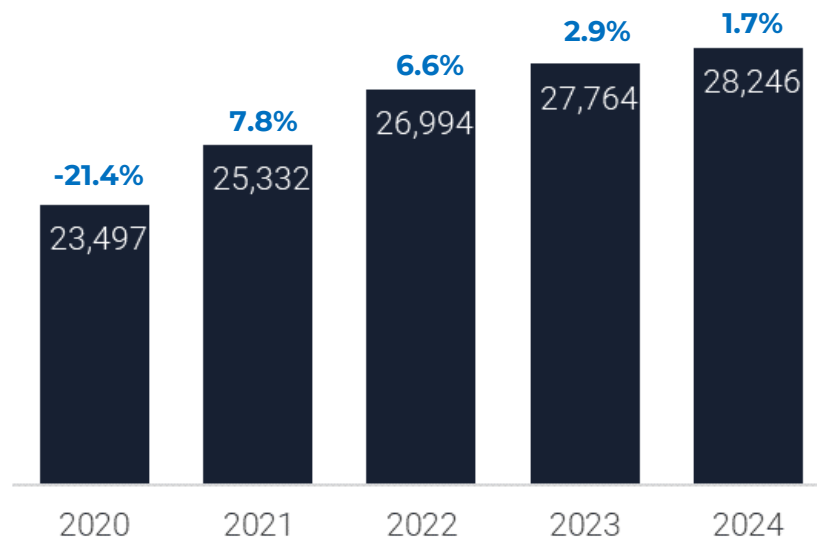


Direct Employment

Employment directly supported by visitor activity increased 1.7% in 2024, reaching 28,246 jobs. Visitor-supported employment is a significant part of several industries in North Dakota—nearly all of lodging employment, 44% of recreation employment, and 39% of food and beverage jobs are supported by visitor spending.

Visitor-Supported Employment in North Dakota

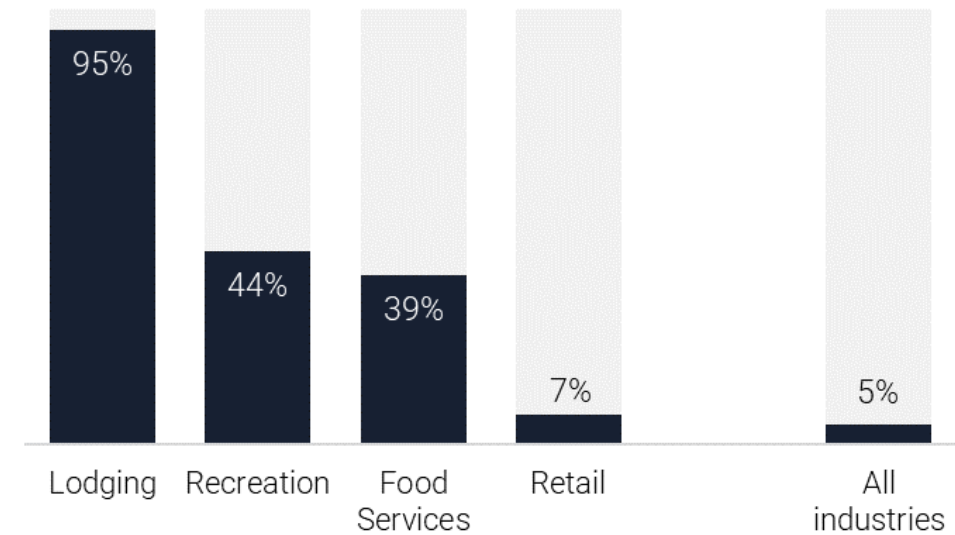
jobs



Source: Tourism Economics

Tourism Employment Intensity

share of total industry employment



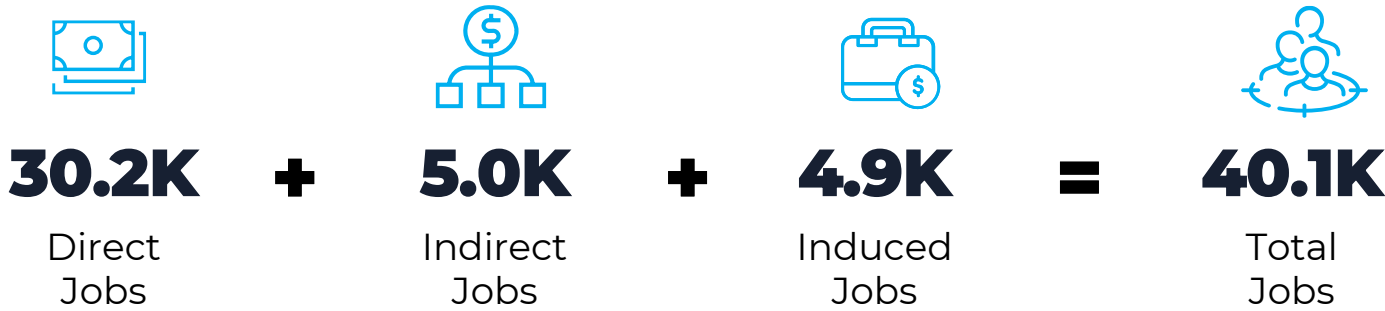
Source: Tourism Economics

The visitor economy in North Dakota directly supported more than **28,000 local jobs**.



Employment Impacts

Visitor activity sustained 30,150 direct jobs in 2024, with an additional 9,904 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 40,054 in 2024, translating to one-in-15 jobs in the state.



Employment by Industry (2024)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	30,150	4,984	4,920	40,054
Food & Beverage	11,902	401	746	13,049
Recreation and Entertainment	5,196	285	138	5,618
Retail Trade	3,803	214	643	4,661
Lodging	4,650	5	3	4,658
Construction and Utilities	1,824	328	184	2,336
Business Services	177	1,267	367	1,811
Finance, Insurance, Real Estate	49	1,193	558	1,800
Personal Services	803	257	479	1,540
Education and Health Care		33	1,325	1,358
Other Transport	685	337	127	1,149
Gasoline Stations	822	20	44	886
Wholesale Trade		186	111	297
Government	73	137	60	270
Communications		173	60	233
Manufacturing	81	83	19	183
Agriculture, Fishing, Mining		63	53	116
Air Transport	85	2	3	90

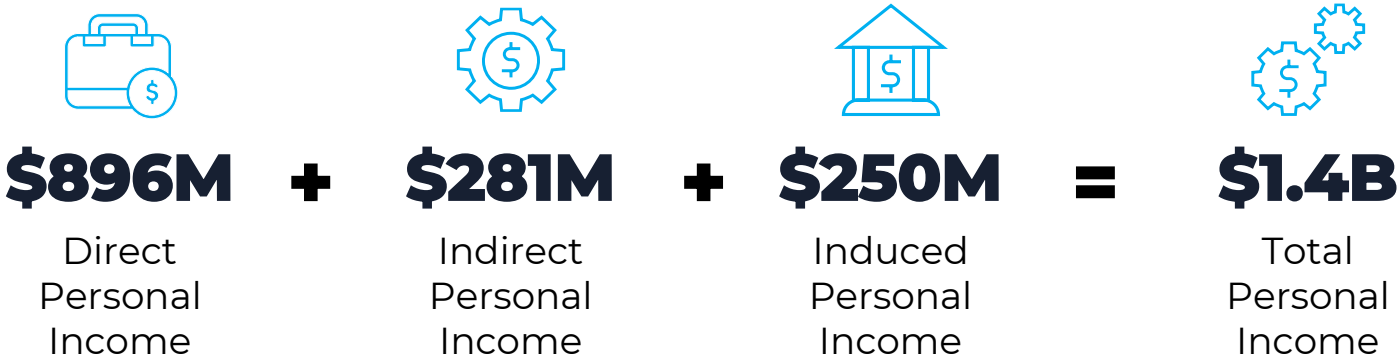
Source: Tourism Economics

Visitor spending supports **one-in-15 of all jobs** in North Dakota, including over **13,000 jobs** in the food and beverage industry.



Personal Income Impacts

Visitor activity generated \$896 million in direct personal income in 2024. Including indirect and induced impacts, employees received \$1.4 billion in personal income. Total visitor-generated income in North Dakota increased 1.2% in 2024.



Personal Income by Industry (2024)

\$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$896	\$281	\$250	\$1,427
Food & Beverage	\$275	\$10	\$20	\$305
Retail Trade	\$138	\$10	\$27	\$175
Recreation and Entertainment	\$141	\$5	\$3	\$149
Lodging	\$134	\$0	\$0	\$134
Construction and Utilities	\$103	\$17	\$6	\$126
Business Services	\$5	\$80	\$20	\$105
Finance, Insurance, Real Estate	\$4	\$65	\$27	\$97
Education and Health Care		\$1	\$87	\$88
Personal Services	\$25	\$17	\$23	\$65
Other Transport	\$26	\$19	\$7	\$52
Gasoline Stations	\$29	\$1	\$2	\$31
Wholesale Trade		\$19	\$12	\$31
Government	\$7	\$12	\$5	\$23
Communications		\$12	\$5	\$17
Manufacturing	\$4	\$8	\$2	\$14
Agriculture, Fishing, Mining		\$7	\$2	\$9
Air Transport	\$6	\$0	\$0	\$7

Source: Tourism Economics



Tax Impacts

Visitor activity generated \$600.8 million in government revenues in 2024.

State and local taxes alone tallied \$310.6 million in 2024.

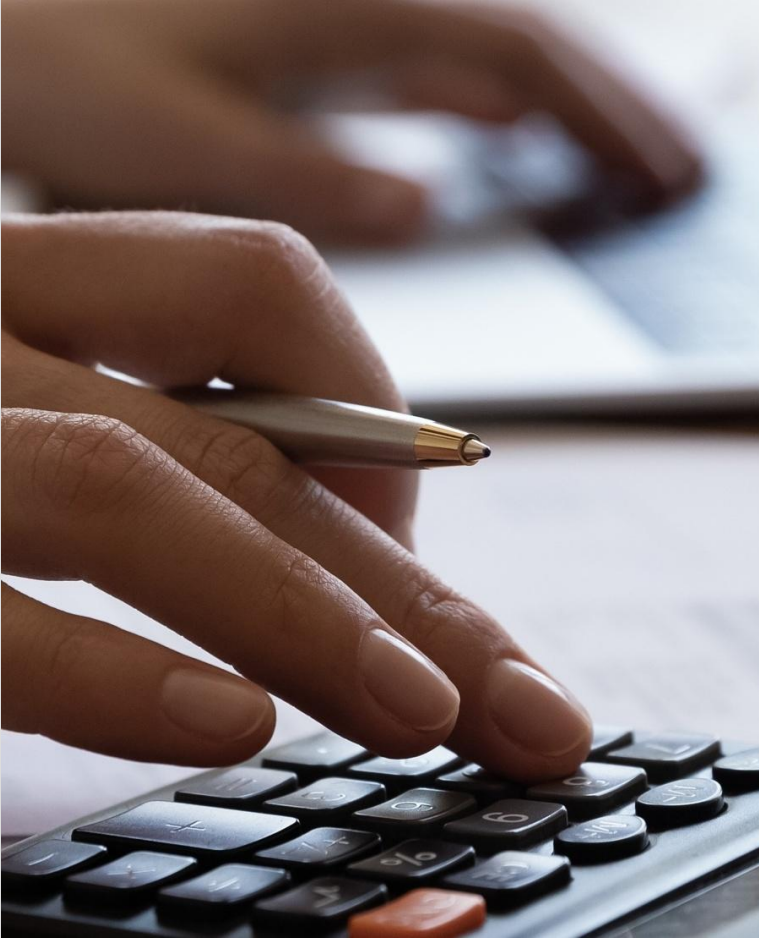
Each household in North Dakota would need to be taxed an additional \$935 to replace the visitor-generated taxes received by destination state and local governments in 2024.

Tax Impacts (2024)

\$ millions

	Total
Total Tax Revenues	\$600.8
Federal Taxes	\$290.3
Personal Income	\$98.1
Corporate	\$27.2
Indirect Business	\$12.5
Social Insurance	\$152.4
State and Local Taxes	\$310.6
Sales	\$154.4
Lodging Tax	\$11.9
Personal Income	\$10.2
Corporate	\$4.7
Social Insurance	\$12.1
Excise and Fees	\$83.1
Property	\$34.1

Source: Tourism Economics



The visitor economy generated over **\$600 million in government revenue** in 2024.

State and Local Tax Impacts (2024)

\$ millions

	Total
State Taxes	\$230.4
Sales	\$134.6
Personal Income	\$10.2
Corporate	\$4.7
Social Insurance	\$12.1
Excise and Fees	\$68.8
Local Taxes	\$80.2
Sales	\$19.7
Lodging Tax	\$11.9
Excise and Fees	\$14.4
Property	\$34.1

Source: Tourism Economics

COUNTY SPENDING & IMPACTS



Visitor Spending Timeline

Visitor Spending Timeline

\$ millions

North Dakota Counties - Annual Visitor Spending							
County	2020	2021	2022	2023	2024	2024 Share of Growth	2024 Share of State
North Dakota	\$2,113.7	\$2,612.6	\$3,062.7	\$3,332.2	\$3,415.1	2.5%	100.0%
Adams County	\$6.3	\$6.4	\$7.2	\$5.8	\$6.4	9.3%	0.2%
Barnes County	\$20.8	\$24.2	\$26.6	\$29.3	\$31.1	6.2%	0.9%
Benson County	\$8.7	\$10.4	\$12.1	\$13.1	\$13.7	4.1%	0.4%
Billings County	\$12.3	\$16.2	\$21.5	\$24.1	\$25.3	5.1%	0.7%
Bottineau County	\$15.6	\$16.8	\$17.9	\$20.2	\$20.9	3.2%	0.6%
Bowman County	\$6.5	\$7.6	\$8.3	\$10.3	\$10.5	2.2%	0.3%
Burke County	\$1.7	\$1.9	\$2.3	\$2.6	\$2.8	5.5%	0.1%
Burleigh County	\$344.2	\$442.4	\$496.3	\$514.7	\$537.4	4.4%	15.7%
Cass County	\$586.8	\$827.5	\$1,001.4	\$1,098.2	\$1,122.1	2.2%	32.9%
Cavalier County	\$3.4	\$4.3	\$5.0	\$5.0	\$5.1	1.5%	0.1%
Dickey County	\$4.8	\$5.2	\$5.4	\$5.8	\$6.2	6.0%	0.2%
Divide County	\$2.7	\$3.4	\$4.0	\$4.2	\$4.3	2.6%	0.1%
Dunn County	\$13.6	\$18.2	\$20.7	\$21.0	\$19.5	-6.9%	0.6%
Eddy County	\$1.1	\$1.5	\$1.6	\$1.6	\$1.5	-6.8%	0.0%
Emmons County	\$2.5	\$3.0	\$4.2	\$4.5	\$4.6	1.0%	0.1%
Foster County	\$9.9	\$11.1	\$12.2	\$12.6	\$12.1	-3.3%	0.4%
Golden Valley County	\$1.7	\$2.0	\$2.2	\$2.6	\$2.6	2.1%	0.1%
Grand Forks County	\$186.7	\$226.9	\$285.0	\$310.2	\$333.5	7.5%	9.8%
Grant County	\$1.6	\$1.9	\$2.4	\$2.5	\$2.7	4.7%	0.1%
Griggs County	\$1.6	\$1.8	\$2.1	\$2.2	\$2.2	-0.7%	0.1%
Hettinger County	\$2.6	\$3.0	\$3.4	\$3.8	\$4.0	4.3%	0.1%
Kidder County	\$4.0	\$4.6	\$4.9	\$4.9	\$4.6	-6.6%	0.1%
LaMoure County	\$3.0	\$3.5	\$3.9	\$4.4	\$4.8	9.5%	0.1%
Logan County	\$1.0	\$1.3	\$1.5	\$1.6	\$1.6	5.4%	0.0%
McHenry County	\$2.6	\$3.3	\$3.9	\$4.5	\$4.5	1.1%	0.1%
McIntosh County	\$3.5	\$3.8	\$4.3	\$4.8	\$5.1	6.3%	0.1%
McKenzie County	\$65.9	\$63.0	\$71.4	\$79.7	\$79.1	-0.8%	2.3%

Source: Tourism Economics

Visitor Spending Timeline

\$ millions

North Dakota Counties - Annual Visitor Spending							
County	2020	2021	2022	2023	2024	2024 Share of Growth	2024 Share of State
North Dakota	\$2,113.7	\$2,612.6	\$3,062.7	\$3,332.2	\$3,415.1	2.5%	100.0%
McLean County	\$11.9	\$13.6	\$14.2	\$16.2	\$17.4	7.2%	0.5%
Mercer County	\$15.2	\$20.3	\$20.7	\$24.6	\$26.0	5.6%	0.8%
Morton County	\$32.7	\$42.7	\$48.8	\$48.5	\$50.1	3.3%	1.5%
Mountrail County	\$58.6	\$59.3	\$72.6	\$83.4	\$80.3	-3.7%	2.4%
Nelson County	\$2.7	\$3.3	\$3.9	\$4.4	\$4.8	9.2%	0.1%
Oliver County	\$0.6	\$1.4	\$1.4	\$1.4	\$1.3	-9.2%	0.0%
Pembina County	\$13.1	\$12.6	\$13.7	\$14.4	\$13.6	-5.6%	0.4%
Pierce County	\$4.5	\$5.4	\$5.5	\$5.5	\$5.6	2.4%	0.2%
Ramsey County	\$53.2	\$57.3	\$57.9	\$60.8	\$64.0	5.3%	1.9%
Ransom County	\$4.9	\$6.0	\$6.4	\$6.2	\$7.3	17.2%	0.2%
Renville County	\$1.7	\$2.0	\$2.0	\$1.6	\$2.0	24.9%	0.1%
Richland County	\$25.5	\$33.6	\$37.4	\$40.9	\$43.2	5.7%	1.3%
Rolette County	\$18.4	\$22.1	\$24.0	\$26.3	\$27.1	3.2%	0.8%
Sargent County	\$2.5	\$3.0	\$3.1	\$3.3	\$3.3	0.0%	0.1%
Sheridan County	\$1.2	\$1.4	\$1.6	\$1.6	\$1.8	9.9%	0.1%
Sioux County	\$8.9	\$10.9	\$12.1	\$13.4	\$14.2	5.6%	0.4%
Slope County	\$0.7	\$0.9	\$1.0	\$0.9	\$0.9	-3.4%	0.0%
Stark County	\$92.3	\$103.5	\$114.9	\$127.5	\$134.0	5.1%	3.9%
Steele County	\$1.3	\$1.5	\$1.7	\$1.9	\$1.8	-3.0%	0.1%
Stutsman County	\$44.7	\$55.6	\$65.3	\$81.1	\$80.1	-1.2%	2.3%
Towner County	\$2.3	\$2.2	\$2.0	\$2.2	\$2.2	1.9%	0.1%
Traill County	\$3.9	\$4.7	\$4.7	\$5.2	\$4.7	-8.0%	0.1%
Walsh County	\$8.6	\$10.1	\$10.8	\$11.7	\$11.9	1.7%	0.3%
Ward County	\$217.5	\$267.9	\$308.7	\$320.1	\$303.1	-5.3%	8.9%
Wells County	\$5.6	\$5.8	\$5.7	\$5.7	\$5.1	-11.3%	0.1%
Williams County	\$166.0	\$150.2	\$190.6	\$229.0	\$241.2	5.3%	7.1%

Source: Tourism Economics

Annual Visitor Spending

Annual Visitor Spending (2024)

\$ millions

County	Visitor Spending - 2024						2024 Growth	State and Local Tax Revenue
	Lodging	F&B	Retail	Recreation	Transport	Total		
North Dakota	\$584.5	\$978.2	\$693.6	\$535.3	\$623.4	\$3,415.1	2.5%	\$310.6
Adams County	\$1.5	\$1.9	\$1.4	\$0.7	\$0.8	\$6.4	9.3%	\$0.6
Barnes County	\$6.4	\$10.7	\$4.2	\$2.9	\$7.0	\$31.1	6.2%	\$2.8
Benson County	\$0.7	\$1.1	\$0.3	\$10.4	\$1.1	\$13.7	4.1%	\$1.1
Billings County	\$5.9	\$6.9	\$4.7	\$5.2	\$2.6	\$25.3	5.1%	\$2.0
Bottineau County	\$6.0	\$7.9	\$2.1	\$2.4	\$2.5	\$20.9	3.3%	\$2.0
Bowman County	\$2.4	\$2.9	\$1.4	\$1.0	\$2.7	\$10.5	2.2%	\$1.1
Burke County	\$0.7	\$0.9	\$0.2	\$0.2	\$0.8	\$2.8	5.5%	\$0.3
Burleigh County	\$78.7	\$143.0	\$153.2	\$65.0	\$97.6	\$537.4	4.4%	\$48.6
Cass County	\$179.1	\$303.1	\$228.1	\$205.3	\$206.6	\$1,122.1	2.2%	\$105.0
Cavalier County	\$0.9	\$1.3	\$0.6	\$0.6	\$1.8	\$5.1	1.5%	\$0.5
Dickey County	\$0.8	\$1.4	\$1.0	\$0.7	\$2.3	\$6.2	6.0%	\$0.6
Divide County	\$1.3	\$1.7	\$0.4	\$0.4	\$0.5	\$4.3	2.6%	\$0.4
Dunn County	\$5.3	\$6.0	\$1.8	\$2.8	\$3.6	\$19.5	-6.9%	\$1.6
Eddy County	\$0.2	\$0.3	\$0.4	\$0.1	\$0.4	\$1.5	-6.8%	\$0.3
Emmons County	\$1.2	\$1.6	\$0.4	\$0.4	\$1.0	\$4.6	1.0%	\$0.5
Foster County	\$2.9	\$3.5	\$1.9	\$1.4	\$2.5	\$12.1	-3.3%	\$1.1
Golden Valley County	\$0.7	\$0.8	\$0.4	\$0.3	\$0.4	\$2.6	2.2%	\$0.3
Grand Forks County	\$58.3	\$105.7	\$79.6	\$33.1	\$56.7	\$333.5	7.5%	\$30.1
Grant County	\$0.9	\$1.0	\$0.1	\$0.1	\$0.5	\$2.7	4.8%	\$0.3
Griggs County	\$0.4	\$0.5	\$0.5	\$0.5	\$0.3	\$2.2	-0.7%	\$0.2
Hettinger County	\$1.2	\$1.4	\$0.4	\$0.4	\$0.6	\$4.0	4.4%	\$0.4
Kidder County	\$1.3	\$1.4	\$0.6	\$0.8	\$0.6	\$4.6	-6.6%	\$0.4
LaMoure County	\$1.1	\$1.6	\$0.6	\$0.6	\$0.8	\$4.8	9.6%	\$0.5
Logan County	\$0.5	\$0.6	\$0.2	\$0.1	\$0.2	\$1.6	5.4%	\$0.1
McHenry County	\$0.8	\$1.7	\$0.3	\$0.3	\$1.5	\$4.5	1.1%	\$0.5
McIntosh County	\$1.6	\$1.7	\$0.7	\$0.5	\$0.7	\$5.1	6.3%	\$0.5
McKenzie County	\$17.8	\$24.9	\$13.3	\$8.5	\$14.5	\$79.1	-0.8%	\$7.0

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Annual Visitor Spending (2024)

\$ millions

County	Visitor Spending - 2024						2024 Growth	State and Local Tax Revenue
	Lodging	F&B	Retail	Recreation	Transport	Total		
North Dakota	\$584.5	\$978.2	\$693.6	\$535.3	\$623.4	\$3,415.1	2.5%	\$310.6
McLean County	\$4.8	\$7.0	\$1.0	\$1.3	\$3.3	\$17.4	7.2%	\$1.5
Mercer County	\$6.2	\$8.2	\$4.4	\$3.0	\$4.1	\$26.0	5.6%	\$2.4
Morton County	\$8.3	\$19.2	\$5.6	\$3.3	\$13.6	\$50.1	3.3%	\$5.3
Mountrail County	\$16.9	\$19.2	\$12.8	\$16.9	\$14.6	\$80.3	-3.7%	\$6.4
Nelson County	\$1.1	\$1.6	\$0.5	\$0.5	\$1.1	\$4.8	9.2%	\$0.5
Oliver County	\$0.3	\$0.4	\$0.2	\$0.1	\$0.3	\$1.3	-9.1%	\$0.2
Pembina County	\$2.6	\$3.6	\$2.0	\$1.8	\$3.6	\$13.6	-5.6%	\$1.3
Pierce County	\$1.0	\$1.9	\$0.5	\$0.5	\$1.7	\$5.6	2.4%	\$0.6
Ramsey County	\$12.7	\$21.5	\$10.7	\$9.4	\$9.7	\$64.0	5.3%	\$5.7
Ransom County	\$1.1	\$2.6	\$0.9	\$0.8	\$1.8	\$7.3	17.2%	\$0.7
Renville County	\$0.6	\$0.6	\$0.4	\$0.1	\$0.3	\$2.0	3.6%	\$0.2
Richland County	\$5.2	\$12.3	\$4.8	\$13.7	\$7.2	\$43.2	5.7%	\$3.7
Rolette County	\$2.9	\$4.8	\$2.3	\$12.4	\$4.7	\$27.1	3.2%	\$2.3
Sargent County	\$0.6	\$1.2	\$0.3	\$0.3	\$0.9	\$3.3	0.0%	\$0.6
Sheridan County	\$0.7	\$0.7	\$0.1	\$0.1	\$0.2	\$1.8	9.9%	\$0.2
Sioux County	\$1.2	\$1.2	\$1.0	\$9.8	\$1.0	\$14.2	5.6%	\$1.0
Slope County	\$0.3	\$0.3	\$0.1	\$0.1	\$0.1	\$0.9	-3.4%	\$0.1
Stark County	\$27.4	\$46.3	\$21.7	\$13.2	\$25.3	\$134.0	5.1%	\$11.2
Steele County	\$0.4	\$0.5	\$0.6	\$0.1	\$0.3	\$1.8	-3.0%	\$0.3
Stutsman County	\$16.1	\$26.8	\$13.1	\$11.9	\$12.2	\$80.1	-1.2%	\$7.8
Towner County	\$0.3	\$0.6	\$0.2	\$0.2	\$0.9	\$2.2	1.9%	\$0.2
Traill County	\$0.4	\$1.4	\$0.3	\$0.4	\$2.2	\$4.7	-8.0%	\$1.2
Walsh County	\$1.6	\$3.1	\$1.8	\$1.2	\$4.2	\$11.9	1.7%	\$1.3
Ward County	\$41.9	\$81.0	\$65.1	\$55.9	\$59.2	\$303.1	-5.3%	\$26.5
Wells County	\$1.1	\$1.7	\$0.7	\$0.5	\$1.0	\$5.1	-11.3%	\$0.5
Williams County	\$50.2	\$75.3	\$43.4	\$33.1	\$39.2	\$241.2	5.3%	\$20.2

Source: Tourism Economics

Annual Visitor Spending

Annual Visitor Spending (2023)

\$ millions

County	Visitor Spending - 2023 (millions)						2023 Growth
	Lodging	F&B	Retail	Recreation	Transport	Total	
North Dakota	\$572.0	\$948.9	\$674.5	\$506.2	\$630.6	\$3,332.2	8.8%
Adams County	\$1.4	\$1.7	\$1.3	\$0.7	\$0.8	\$5.8	-19.4%
Barnes County	\$5.8	\$10.0	\$3.9	\$2.5	\$7.0	\$29.3	10.3%
Benson County	\$0.7	\$1.1	\$0.3	\$9.9	\$1.1	\$13.1	8.5%
Billings County	\$5.7	\$6.6	\$4.3	\$4.9	\$2.6	\$24.1	12.1%
Bottineau County	\$5.9	\$7.6	\$2.0	\$2.2	\$2.6	\$20.2	13.3%
Bowman County	\$2.3	\$2.8	\$1.4	\$1.0	\$2.7	\$10.3	24.1%
Burke County	\$0.6	\$0.8	\$0.2	\$0.1	\$0.8	\$2.6	16.9%
Burleigh County	\$75.2	\$137.6	\$146.8	\$59.1	\$96.0	\$514.7	3.7%
Cass County	\$177.0	\$296.2	\$227.5	\$192.5	\$205.0	\$1,098.2	9.7%
Cavalier County	\$0.8	\$1.3	\$0.6	\$0.5	\$1.8	\$5.0	0.9%
Dickey County	\$0.7	\$1.3	\$0.9	\$0.6	\$2.3	\$5.8	7.3%
Divide County	\$1.3	\$1.6	\$0.4	\$0.4	\$0.5	\$4.2	5.4%
Dunn County	\$5.8	\$6.5	\$1.8	\$2.8	\$4.2	\$21.0	1.4%
Eddy County	\$0.2	\$0.4	\$0.4	\$0.1	\$0.5	\$1.6	-0.8%
Emmons County	\$1.2	\$1.6	\$0.4	\$0.4	\$1.0	\$4.5	6.8%
Foster County	\$3.0	\$3.6	\$1.9	\$1.4	\$2.7	\$12.6	3.2%
Golden Valley County	\$0.7	\$0.8	\$0.4	\$0.3	\$0.4	\$2.6	15.8%
Grand Forks County	\$53.7	\$97.3	\$72.8	\$29.8	\$56.6	\$310.2	8.8%
Grant County	\$0.9	\$1.0	\$0.1	\$0.1	\$0.5	\$2.5	5.9%
Griggs County	\$0.4	\$0.5	\$0.5	\$0.4	\$0.3	\$2.2	5.4%
Hettinger County	\$1.1	\$1.3	\$0.4	\$0.4	\$0.6	\$3.8	12.0%
Kidder County	\$1.4	\$1.5	\$0.6	\$0.8	\$0.7	\$4.9	-0.5%
LaMoure County	\$1.0	\$1.5	\$0.5	\$0.5	\$0.8	\$4.4	12.9%
Logan County	\$0.5	\$0.6	\$0.2	\$0.1	\$0.2	\$1.6	5.7%
McHenry County	\$0.8	\$1.6	\$0.3	\$0.3	\$1.5	\$4.5	13.5%
McIntosh County	\$1.4	\$1.6	\$0.7	\$0.5	\$0.7	\$4.8	11.0%
McKenzie County	\$18.4	\$25.1	\$13.2	\$8.6	\$14.5	\$79.7	11.7%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Annual Visitor Spending (2023)

\$ millions

County	Visitor Spending - 2023 (millions)						2023 Growth
	Lodging	F&B	Retail	Recreation	Transport	Total	
North Dakota	\$572.0	\$948.9	\$674.5	\$506.2	\$630.6	\$3,332.2	8.8%
McLean County	\$4.3	\$6.6	\$0.9	\$1.1	\$3.3	\$16.2	21.3%
Mercer County	\$5.8	\$7.6	\$4.2	\$2.8	\$4.1	\$24.6	22.5%
Morton County	\$7.9	\$18.4	\$5.3	\$3.2	\$13.6	\$48.5	-3.8%
Mountrail County	\$17.7	\$19.8	\$12.9	\$17.2	\$15.8	\$83.4	16.0%
Nelson County	\$1.0	\$1.5	\$0.4	\$0.5	\$1.1	\$4.4	12.9%
Oliver County	\$0.3	\$0.4	\$0.2	\$0.1	\$0.3	\$1.4	-2.2%
Pembina County	\$2.8	\$3.8	\$2.1	\$1.8	\$3.9	\$14.4	5.3%
Pierce County	\$0.9	\$1.9	\$0.5	\$0.5	\$1.7	\$5.5	5.4%
Ramsey County	\$12.0	\$20.3	\$9.9	\$8.9	\$9.7	\$60.8	6.4%
Ransom County	\$0.9	\$2.0	\$0.8	\$0.7	\$1.8	\$6.2	-4.0%
Renville County	\$0.3	\$0.6	\$0.4	\$0.1	\$0.3	\$1.6	-5.3%
Richland County	\$4.9	\$11.8	\$4.0	\$13.0	\$7.2	\$40.9	8.0%
Rolette County	\$2.8	\$4.7	\$2.1	\$12.0	\$4.7	\$26.3	7.6%
Sargent County	\$0.5	\$1.2	\$0.4	\$0.3	\$0.9	\$3.3	10.9%
Sheridan County	\$0.7	\$0.6	\$0.1	\$0.1	\$0.2	\$1.6	8.8%
Sioux County	\$1.1	\$1.2	\$0.9	\$9.2	\$1.0	\$13.4	8.5%
Slope County	\$0.3	\$0.3	\$0.1	\$0.1	\$0.1	\$0.9	2.5%
Stark County	\$25.7	\$43.5	\$20.4	\$12.8	\$25.1	\$127.5	11.0%
Steele County	\$0.4	\$0.5	\$0.6	\$0.1	\$0.3	\$1.9	9.7%
Stutsman County	\$16.4	\$26.7	\$13.1	\$12.0	\$13.0	\$81.1	20.2%
Towner County	\$0.3	\$0.6	\$0.2	\$0.2	\$0.9	\$2.2	3.2%
Traill County	\$0.5	\$1.5	\$0.3	\$0.4	\$2.5	\$5.2	3.4%
Walsh County	\$1.6	\$3.1	\$1.7	\$1.1	\$4.2	\$11.7	7.9%
Ward County	\$45.6	\$84.4	\$67.1	\$55.9	\$67.1	\$320.1	4.1%
Wells County	\$1.2	\$1.9	\$0.8	\$0.6	\$1.3	\$5.7	20.7%
Williams County	\$48.1	\$70.7	\$41.1	\$30.9	\$38.3	\$229.0	23.6%

Source: Tourism Economics

Tourism Impacts

Tourism Impacts (2024)

Jobs, \$ millions

County	Employment		Employment -	Employment -	Personal Income	
	Direct	Total	Share of State Tourism	Share of County Total	Direct	Total
North Dakota	28,246	40,054	70.5%	6.5%	\$782.3	\$1,427.0
Adams County	51	75	0.2%	4.7%	\$1.0	\$2.2
Barnes County	287	412	1.0%	5.7%	\$5.8	\$10.8
Benson County	149	192	0.5%	6.3%	\$2.5	\$4.7
Billings County	181	224	0.6%	18.1%	\$7.6	\$9.1
Bottineau County	238	306	0.8%	6.4%	\$4.7	\$7.6
Bowman County	95	124	0.3%	5.4%	\$1.8	\$3.1
Burke County	15	23	0.1%	1.6%	\$0.2	\$0.6
Burleigh County	4,185	6,262	15.6%	7.9%	\$117.7	\$235.8
Cass County	10,210	14,441	36.1%	8.6%	\$316.5	\$564.8
Cavalier County	35	47	0.1%	1.7%	\$0.7	\$1.2
Dickey County	51	78	0.2%	2.1%	\$0.8	\$2.0
Divide County	33	52	0.1%	3.4%	\$0.6	\$1.5
Dunn County	78	119	0.3%	3.3%	\$1.8	\$4.0
Eddy County	11	20	0.1%	1.4%	\$0.2	\$0.5
Emmons County	95	114	0.3%	5.1%	\$1.7	\$2.4
Foster County	153	174	0.4%	6.9%	\$2.4	\$3.4
Golden Valley County	16	22	0.1%	1.5%	\$0.3	\$0.5
Grand Forks County	3,167	4,498	11.2%	8.0%	\$84.3	\$151.0
Grant County	19	33	0.1%	2.0%	\$0.3	\$0.9
Griggs County	6	17	0.0%	1.0%	\$0.2	\$0.6
Hettinger County	55	58	0.1%	3.7%	\$0.9	\$1.0
Kidder County	48	54	0.1%	3.1%	\$0.7	\$0.9
LaMoure County	30	37	0.1%	1.3%	\$0.5	\$0.8
Logan County	18	21	0.1%	1.4%	\$0.2	\$0.3
McHenry County	43	67	0.2%	2.3%	\$0.6	\$1.7
McIntosh County	44	70	0.2%	3.6%	\$0.9	\$2.0
McKenzie County	553	696	1.7%	4.6%	\$16.4	\$27.0

Source: Tourism Economics

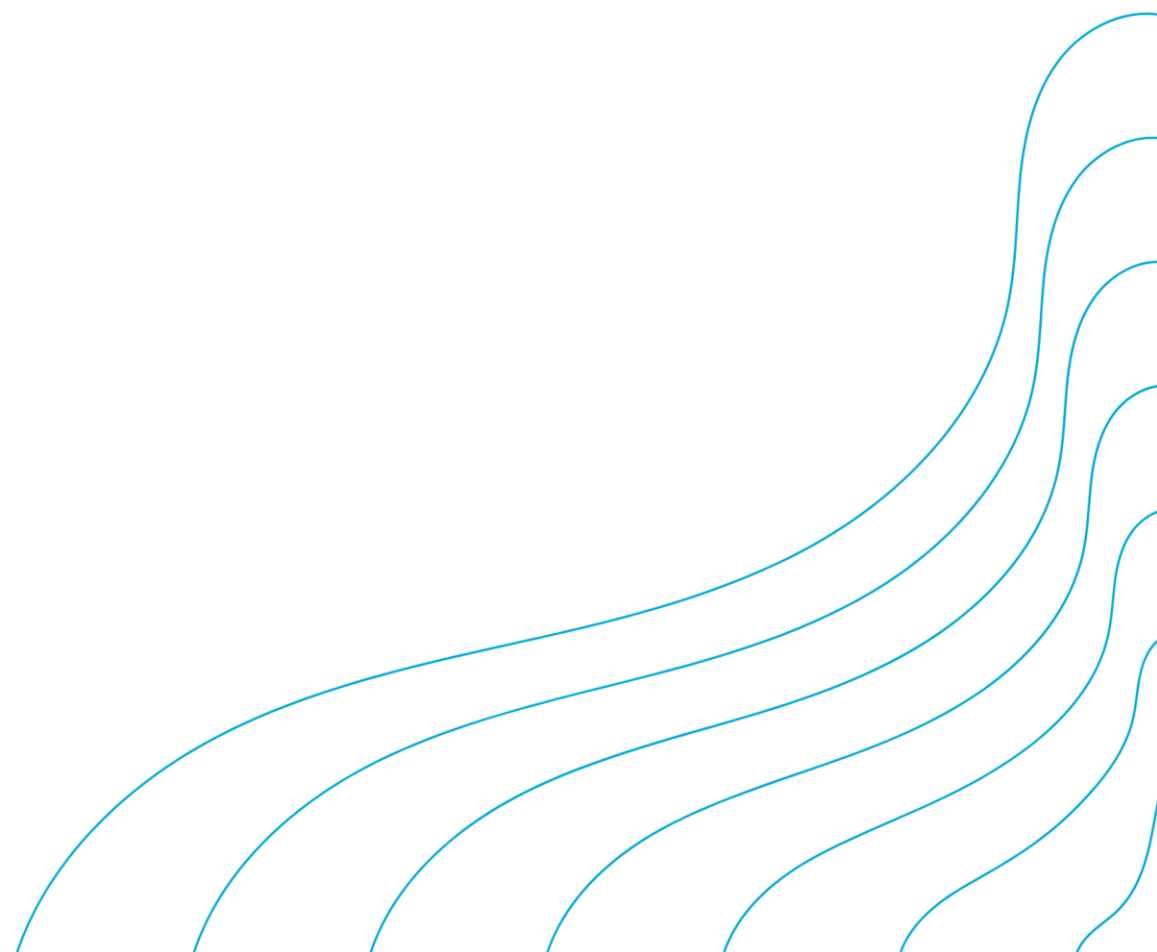
Tourism Impacts (2024)

Jobs, \$ millions

County	Employment		Employment -	Employment -	Personal Income	
	Direct	Total	Share of State Tourism	Share of County Total	Direct	Total
North Dakota	28,246	40,054	70.5%	6.5%	\$782	\$1,427
McLean County	114	159	0.4%	2.7%	\$2.2	\$5.0
Mercer County	246	338	0.8%	5.2%	\$5.0	\$11.6
Morton County	449	795	2.0%	4.2%	\$10.8	\$27.2
Mountrail County	603	713	1.8%	9.7%	\$15.1	\$21.9
Nelson County	79	96	0.2%	4.4%	\$1.2	\$1.8
Oliver County	18	30	0.1%	2.3%	\$0.3	\$1.2
Pembina County	132	207	0.5%	4.1%	\$2.3	\$5.6
Pierce County	90	114	0.3%	4.0%	\$1.5	\$2.6
Ramsey County	785	970	2.4%	11.5%	\$20.7	\$29.1
Ransom County	74	107	0.3%	3.2%	\$1.3	\$2.7
Renville County	17	21	0.1%	1.7%	\$0.3	\$0.5
Richland County	276	417	1.0%	3.6%	\$5.3	\$11.4
Rolette County	268	350	0.9%	5.4%	\$4.4	\$7.4
Sargent County	39	65	0.2%	1.7%	\$0.6	\$1.6
Sheridan County	12	28	0.1%	3.3%	\$0.1	\$0.6
Sioux County	5	8	0.0%	0.3%	\$0.1	\$0.2
Slope County	10	10	0.0%	1.4%	\$0.3	\$0.3
Stark County	596	923	2.3%	3.3%	\$16.3	\$33.5
Steele County	13	17	0.0%	1.4%	\$0.3	\$0.5
Stutsman County	1,027	1,326	3.3%	8.7%	\$23.5	\$37.2
Towner County	20	25	0.1%	1.5%	\$0.2	\$0.4
Traill County	35	65	0.2%	1.2%	\$0.6	\$2.0
Walsh County	134	208	0.5%	2.8%	\$2.5	\$6.1
Ward County	2,232	3,152	7.9%	6.3%	\$59.8	\$104.7
Wells County	38	55	0.1%	1.9%	\$0.5	\$1.2
Williams County	1,068	1,618	4.0%	4.5%	\$36.3	\$70.2

Source: Tourism Economics

APPENDIX



Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as the state of North Dakota.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations.

The Tourism Satellite Account (TSA) which measures the tourism-related capital investments into the economy of the study area, are estimated through the analysis of industry-specific data sets on the construction industry, Census Capital Expenditure Survey data, BEA personal consumption expenditure data, and government data.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

Data Sources

- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR:** Lodging performance data, including room demand and revenue for hotels
- **North Dakota Office of the State Tax Commissioner:** Local lodging and restaurant tax and sales tax receipts, by industry
- **BEA/BLS:** Employment, wage, and CPI data, by industry
- **US Census:** Business sales and employment by industry, seasonal second homes inventory, population, households, and median real estate taxes paid
- **National Park Service:** National Park visitor data
- **US Bureau of Transportation:** Air passenger data for airports in North Dakota
- **US EIA:** Gasoline prices for Midwest Region
- **Tourism Economics:** International arrivals data for overseas, Canadian, and Mexican travel to North Dakota
- **Oxford Economics:** Construction data, by industry, for North Dakota

Glossary

SPENDING DEFINITIONS	LODGING	All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.
	FOOD & BEVERAGE	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
	RECREATION	Includes visitors spending within the arts, entertainment and recreation sector.
	RETAIL	Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.
	LOCAL TRANSPORT	Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.
	AIR TRANSPORT	Where applicable, the local share of air transportation spending.
ECONOMIC IMPACT DEFINITIONS	SECOND HOMES	Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.
	DIRECT IMPACT	Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).
	INDIRECT IMPACT	Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).
	INDUCED IMPACT	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.
	EMPLOYMENT	Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
	PERSONAL INCOME	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
	VALUE ADDED (GDP)	Business sales net of intermediate (supply chain) purchases.
	LOCAL TAXES	City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.
	STATE TAXES	State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

Oxford Economics employs more than 600 full-time staff, including 350+ professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



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