

2020 | ANNUAL REPORT



NORTH
Dakota | Commerce
Be Legendary.™

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

YEAR IN REVIEW & RESEARCH

2020 was a year of disruption and hardship for the travel and tourism industry. While North Dakota fared better than many states, we still saw canceled events, business closures, 6,200 lost jobs and the loss of more than \$1 billion in visitor spending.

Still, North Dakota has competitive advantages that allowed us to continue drawing visitors throughout the year and inspire future trips. Our marketing efforts invited visitors to “follow their curiosity not the crowds” and celebrated North Dakota’s wide-open spaces, outdoor and recreational opportunities, amenities, vibrant communities and road trips. These messages proved critical for our industry in 2020 and will continue to be valued in 2021.

North Dakota Tourism continued to advertise in 2020 with refined and relevant messages to nearby markets, and we saw a 51% increase in website traffic over the previous year. Our new image research also showed that destination advertising has a much larger impact than motivating travel. This advertising lifts the overall image of the state and economic development factors, such as being a good place to start a business, start a career, attend college and more.

The recovery of North Dakota’s \$3 billion hospitality industry is our priority. We are dedicated to supporting our industry partners through the continued promotion of the many safe, open, uncrowded, worry-free, affordable and exciting vacation options in North Dakota. Our strategies are centered on inspiring visitation and directing interest to our partners who can close the sale and deliver on legendary experiences.

North Dakota Tourism and Marketing Director

Sara Otte Coleman



North Dakota Tourism and Marketing Director Sara Otte Coleman stands next to “Dak,” the 3D-printed buffalo. WGA (The Western Governors’ Association) conference was one of hundreds of events scheduled and eventually canceled due to the pandemic.

RESEARCH

The pandemic significantly impacted North Dakota’s visitor economy. According to new research by Tourism Economics, shutdowns in the spring cut travel by three-quarters at the worst point. However, losses shrank into the summer and fall as North Dakota welcomed visitors from areas with more restrictions.



18.7 MILLION

VISITORS IN 2020
A 21% DECREASE



\$2.1 BILLION

IN VISITOR SPENDING
A 31.8% DECREASE



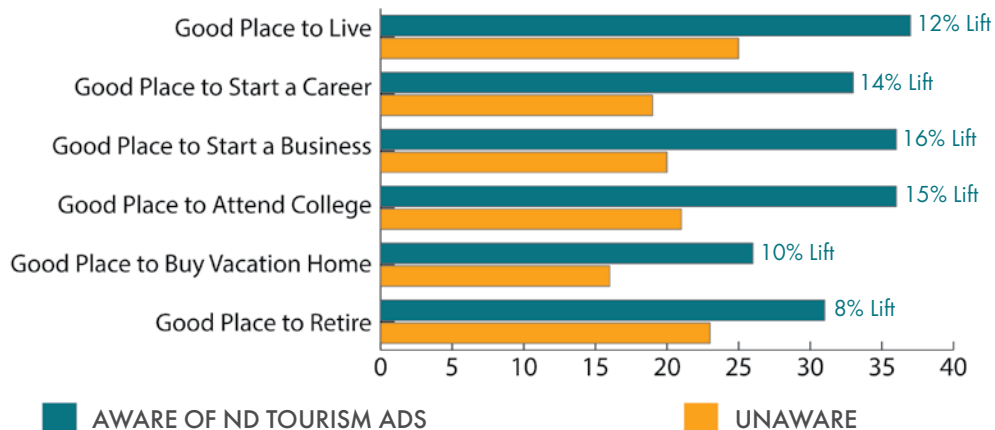
\$218.9 MILLION

ESTIMATED STATE & LOCAL TAX
REVENUE – A 27.1% DECREASE

TOURISM ADVERTISING ELEVATES NORTH DAKOTA'S IMAGE

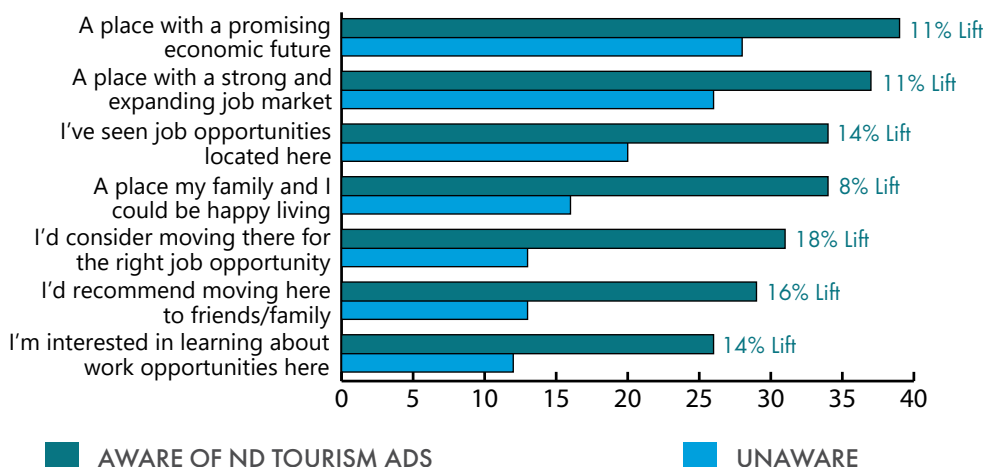
Research shows North Dakota Tourism's promotional campaigns create a "halo effect" that lifts image and diversifies the economy through increased visitation and makes North Dakota a more favorable place to live, work, start a business, attend college, purchase a home and retire.

HALO EFFECT OF NORTH DAKOTA TOURISM MARKETING



Awareness of North Dakota's advertising led to double-digit increases across economic development attributes, most notably the impression of North Dakota as a place to be happy living in, that would be considered moving to for the right job opportunity and willingness to recommend to friends and family.

TOURISM ADVERTISING IMPROVES IMAGE OF ECONOMIC DEVELOPMENT ATTRIBUTES



TOURISM IS A GATEWAY TO ECONOMIC DEVELOPMENT

Businesses don't build in a location they know nothing about. People don't move to a location they've never visited.



Arrivalist tracks actual arrivals in North Dakota through mobile devices after exposure to digital advertising and NDtourism.com.

In 2020, GPS monitoring of more than 882,000 devices showed:

- **47%** traveled **50-100 miles** to visit North Dakota.
- **Friday** is the weekday with the most arrivals (**21%**), followed by **Saturday** (**19%**).
- North Dakota received visitation from all 50 states and **30 countries**.

ADVERTISING & MARKETING

Committed to promoting North Dakota and tourism-related businesses, North Dakota Tourism, along with advertising partner Odney, stayed nimble and resilient during the 2020 advertising year. Messaging, markets and strategies were all revised to keep North Dakota top-of-mind for future vacations and engage locals and nearby audiences to explore the state.



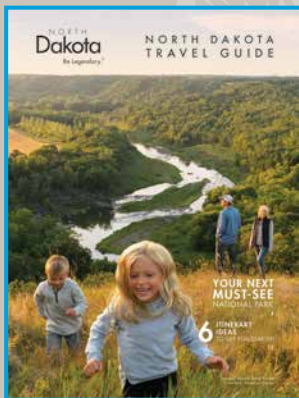
DIGITAL NATIVE ADVERTISING ARTICLES BEGIN RUNNING



NEW IN-STATE TV AD WITH SUPPORT OF JOSH DUHAMEL IS DEVELOPED AND BEGINS TO RUN



IN-STATE PRINT CAMPAIGN WITH STATE-FUNDED COOPERATIVE PARTNERSHIP RUNS



NEW CAMPAIGN INVITES VISITORS TO FOLLOW THEIR CURIOSITY NOT THE CROWDS



OUTDOOR TV SPONSORSHIPS CONTINUED WHILE THE PLANNED DIGITAL CAMPAIGN PAUSED; NEW ADS PRODUCED



BUS AND TRAIN WRAPS IN MINNEAPOLIS AND CHICAGO WERE POSTED THROUGH THE END OF THE YEAR, RESULTING IN AN ADDITIONAL 50 MILLION IMPRESSIONS

INTEND TO TRAVEL METRICS

WEBSITE TRAFFIC

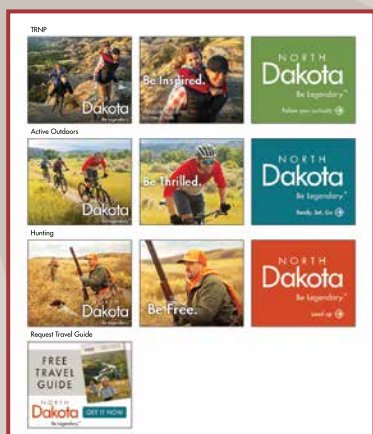
USERS
1,579,523
76.95% increase

SESSIONS
1,716,372
51.66% increase

PAGEVIEWS
2,209,869
10.76% increase

TRADITIONAL INQUIRIES

34,094
4% increase



INCREASED DIGITAL PRESENCE
WAS A SUCCESS



THIRD-QUARTER OUTDOORS
SPONSORSHIP BEGINS



D&N filming for the winter campaign.

PREPARATIONS ON ND TOURISM'S FIRST
EVER WINTER CAMPAIGN



NDNA NEWSPAPER AD WITH
CO-OP PARTNERS RUNS



"LET'S GO THERE" DIGITAL CAMPAIGN
ALIGNED WITH U.S. TRAVEL EFFORT



"LET'S GO THERE, TOGETHER" SOCIAL
CAMPAIGN ALIGNED WITH U.S. TRAVEL EFFORT

REACH



TV
116,663,240
In-state campaign
increased impressions
by 3.5%



PRINT
12,241,280
Advertising presence
in 46 magazines and
newspapers



OUT-OF-HOME
111,456,044
Bonus advertising nearly
doubled OOH presence



DIGITAL
111,998,358
Campaign traffic increased
109% over 2019



SOCIAL MEDIA
2,086,982
CTR of 1.3% is almost
double industry average

PUBLIC RELATIONS

Our public relations efforts tell the North Dakota story, garner positive media coverage and increase awareness and consumer engagement. Interest from regional and national media escalated as attractions like North Dakota's state parks saw record camping numbers.



**2020 INFLUENCER
CAMPAIGN REACHES
10.6 MILLION**



State-supported campaign receives more than **323,000 impressions** and **82,300 social media engagements**.

732

MEDIA PLACEMENTS



1.35 BILLION
ESTIMATED AUDIENCE
REACH

\$

\$12.9 MILLION
IN EDITORIAL VALUE

AWARD



ACCOLADES

"Oh man, if you need some wide-open spaces to find peace and tranquility there is no better location than Theodore Roosevelt National Park ..."
– Deb Thompson of *"Just Short of Crazy"*

"The Rendezvous Region is the perfect stop on a North Dakota road trip as it is an adventure lovers' paradise ... North Dakota has everything you need for an amazing vacation, so start planning yours now!" – Kirsten Maxwell of *"Kids are a Trip"*

"The secret is out. North Dakota is a sleeper state that you need to put on your radar for your next road trip." – Nedra McDaniel of *"Adventure Mom"*

"North Dakota might be the best domestic beer scene we're all sleeping on. As the rest of the country debates whether the craft bubble is bursting, North Dakota's just getting started."
– Andy Kryza – *Thrillist*

SOCIAL MEDIA

The North Dakota Travel social channels continue to be a place for visitors and locals to discover, learn more and interact directly with ND Tourism. In 2020, efforts were focused on driving website traffic, inspiring locals to rediscover their state and promoting safe recreation.

151,714



FOLLOWERS
7% increase YOY

49,485



WEB TRAFFIC
22% increase YOY

15,313,814



IMPRESSIONS

4,633,526+



VIDEO VIEWS

300,000+



UGC TAGS
and engagements

CO-OP PROGRAM

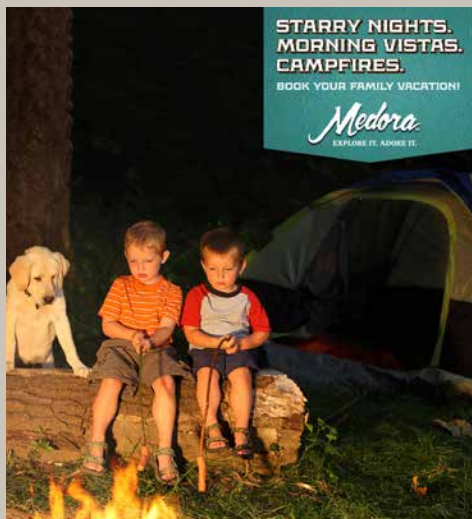
Supporting travel partners has always been our priority. In 2020, North Dakota Tourism developed a new social co-op program to help meet our partners' marketing priorities during the pandemic. This program included 12 partners and local efforts were amplified by using North Dakota Tourism platforms.

SUPPORTED
12 PARTNERS
USING NORTH DAKOTA
TOURISM PLATFORMS

CONNECTED
12,500+
POTENTIAL VISITORS TO
PARTNER WEBSITES

GENERATED
1,100,000+
IMPRESSIONS FROM
SOCIAL MEDIA USERS

REACHED
400,000+
PEOPLE THROUGH CO-OP
PROGRAM POSTS



NORTH DAKOTA'S FARTHEST-REACHING SOCIAL PRESENCE

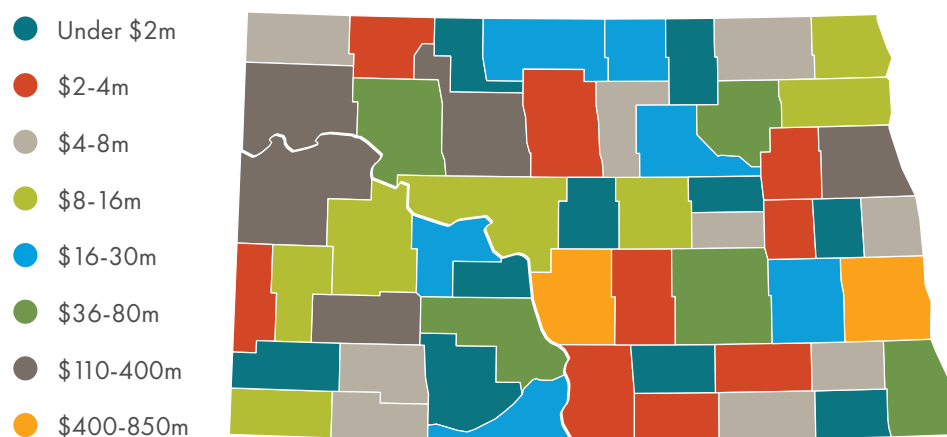


BY THE NUMBERS

NORTH DAKOTA TRAVEL INDUSTRY

Travel Segment	2019	2020	+/-
State Parks	1,204,518	1,364,169	+12%
National Parks	722,627	569,313	-21%
Major Attractions	4,564,301	1,645,936	-64%
Visitor Centers	99,984	29,132	-71%
Canadian Border Crossings	566,274	129,207	-77%
Deplanements	1,187,274	577,467	-51%
Lodging Tax	\$3,623,933	\$2,475,791	-23%
Statewide Hotel Occupancy Rate	55.2%	39.1%	-29%

TRAVEL & TOURISM IMPACT ACROSS THE STATE



The 2018 economic impact research showed significant visitor spending across all North Dakota counties.

- Cass County received the most visitor spending: \$878.91 million
- McKenzie County had the largest growth in visitor spending: 33.1%

TAXABLE SALES & PURCHASES THROUGH 3RD QTR 2020

Accommodations/Food Services

2019	2020	+/-
\$1,383,906,655	\$1,116,571,135	-19.31%

Arts/Entertainment/Recreation

2019	2020	+/-
\$94,997,559	\$74,796,601	-21.26%

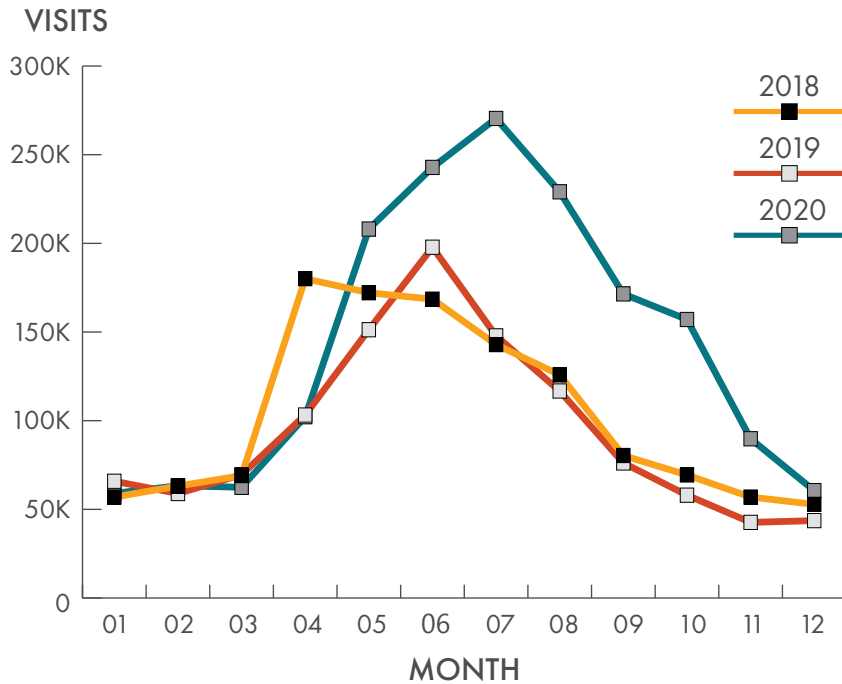
IS NORTH DAKOTA THE LEAST-VISITED STATE?

Visitor spending is one way to compare travel between states. The U.S. Travel Association reports this data, aggregated using the same methodology across all states and the District of Columbia. In 2018, North Dakota lost some market share, falling to 47th.

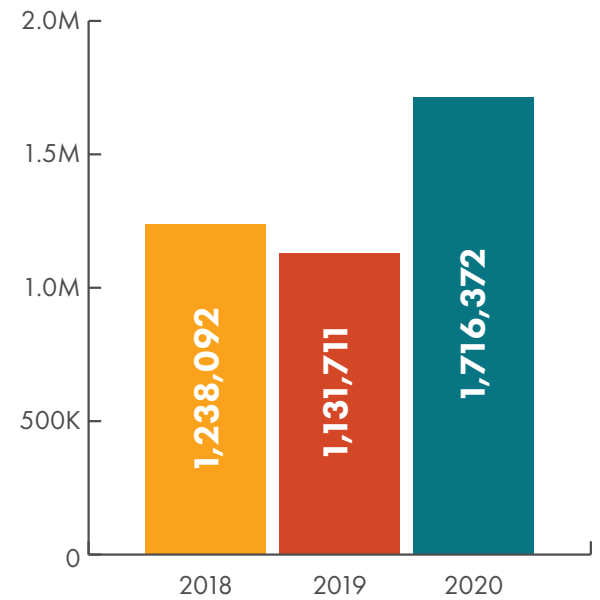
Rank	State	2018\$(m)
1	California	\$148,447
2	Florida	\$102,844
3	New York	\$83,045
4	Texas	\$76,403
5	Nevada	\$42,496
40	Nebraska	\$5,493
41	Montana	\$4,909
42	Maine	\$4,517
43	New Hampshire	\$4,350
44	West Virginia	\$4,349
45	Wyoming	\$3,687
46	South Dakota	\$3,398
47	North Dakota	\$3,085
48	Alaska	\$2,851
49	Vermont	\$2,666
50	Delaware	\$2,303
51	Rhode Island	\$2,289

NORTH
Dakota
Be Legendary.™

TOTAL WEB VISITS BY MONTH



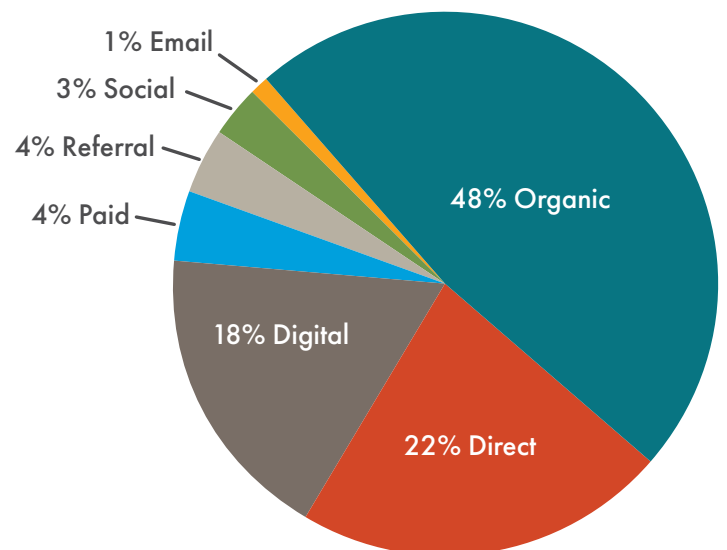
TOTAL WEB VISITS BY YEAR



TOP LOCATIONS FOR WEBSITE TRAFFIC

Rank	Location
1	Minnesota
2	North Dakota
3	Illinois
4	Wisconsin
5	Nebraska
6	California
7	Washington
8	Texas
9	South Dakota
10	Colorado

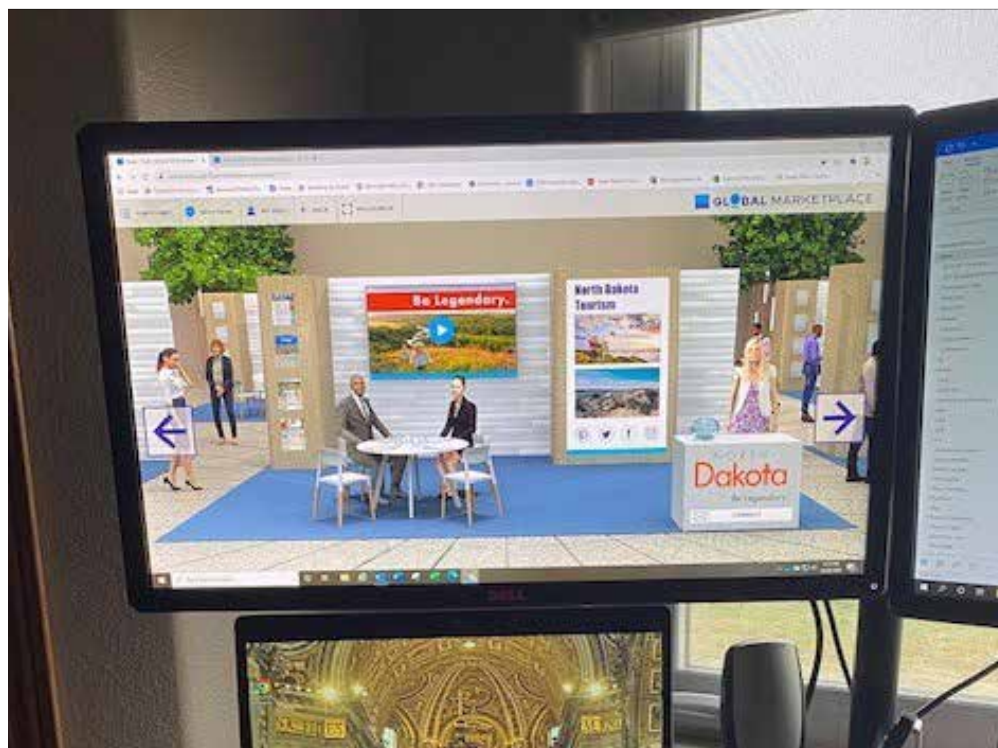
ORIGIN OF SITE TRAFFIC FOR NDtourism.com



For a complete list of references used to compile the data contained within this report, please email marketing@nd.gov or call 1-800-435-5663.

GLOBAL

The Global Marketing program educates the overseas markets about North Dakota's travel and tourism offerings and motivates travelers and visitor spending. Efforts in 2020 pivoted to virtual sales missions, digital pitching and innovative ways to showcase the state, working cooperatively with South Dakota, Montana, Wyoming and Idaho.



Participated in sales missions to Italy and France pre-pandemic and virtually participated in the Go West Summit, Brand USA Travel Week, the American Indian Tourism Conference, Great American West European Virtual Sales Mission and 27 travel trade meetings.



\$838,646

IN EARNED EDITORIAL
COVERAGE, REACHING

53.6 MILLION

READERS THROUGH

158 STORIES



NORTH DAKOTA TRAVEL
PRODUCT FEATURED BY

**128 INTERNATIONAL
TOUR OPERATORS**

WITH

12 COMMUNITIES

HAVING OVERNIGHT STAYS

GROUP

Group travel was severely impacted with an estimated 90% of group tour business lost, equaling more than \$2.5 million in lost business and visitation. Interest in North Dakota remained strong and our reputation for being an open and safe destination for groups helped tours return during the summer.



140+

MORE THAN 140 CANADIAN AND US TOURS ENJOYED TIME IN NORTH DAKOTA IN 2020.

150+

DIGITAL PROFILE PIECE AND ALL-NEW INSPIRATION GUIDE SENT TO MORE THAN 150 OPERATORS.



PRE-PANDEMIC: ATTENDED AMERICAN BUS ASSOCIATION AND HEARTLAND TRAVEL SHOWCASE CONVENTIONS – MEETING WITH 60 OPERATORS AND INDUSTRY PROFESSIONALS.

38

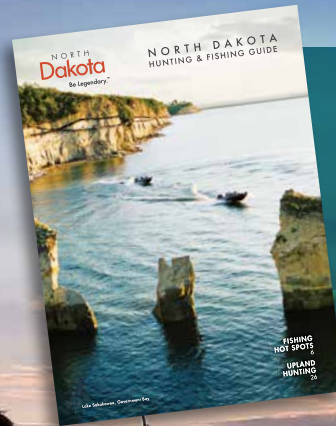
REPRESENTED NORTH DAKOTA IN 38 WOMEN IN BUSES MEETINGS – WHICH INCLUDES TOUR AND MOTORCOACH OPERATORS, BUS DRIVERS, DMOS, SUPPLIERS AND INDUSTRY PARTNERS



POST-PANDEMIC: VIRTUAL APPOINTMENTS, ZOOM AND MICROSOFT TEAM MEETINGS, VIRTUAL COFFEE BREAKS AND PHONE CALLS HAVE PROVIDED CONFIDENCE TO OPERATORS THAT NORTH DAKOTA PARTNERS ARE SAFE AND READY TO TAKE CARE OF CLIENTS.

OUTDOOR

North Dakota's Outdoors Marketing program works to entice outdoor enthusiasts to visit North Dakota. Efforts include working with media, participation in high-attendance outdoor and hunting and fishing consumer shows, social media and both travel trade and consumer relations.



23,000
GUIDES ADDED TO
NORTH DAKOTA'S
REST AREA
BROCHURE RACKS.

THE COVID-19 PANDEMIC HAS ONLY STRENGTHENED TRAVELERS' URGES TO GET OUTSIDE FOR MENTAL WELL-BEING AND PHYSICAL HEALTH. THIS DEMAND ALIGNS WITH SOME OF NORTH DAKOTA'S GREATEST ASSETS.



ATTENDED 3 SPORTSHOWS before the pandemic shut down remaining events scheduled. Distributed more than **1,000 Hunting & Fishing Guides** and hundreds of partner materials.



NORTH DAKOTA PARKS AND RECREATION DEPARTMENT had highest number of campers recorded in its history. **35% increase** in campsite nights compared to 2019 season.

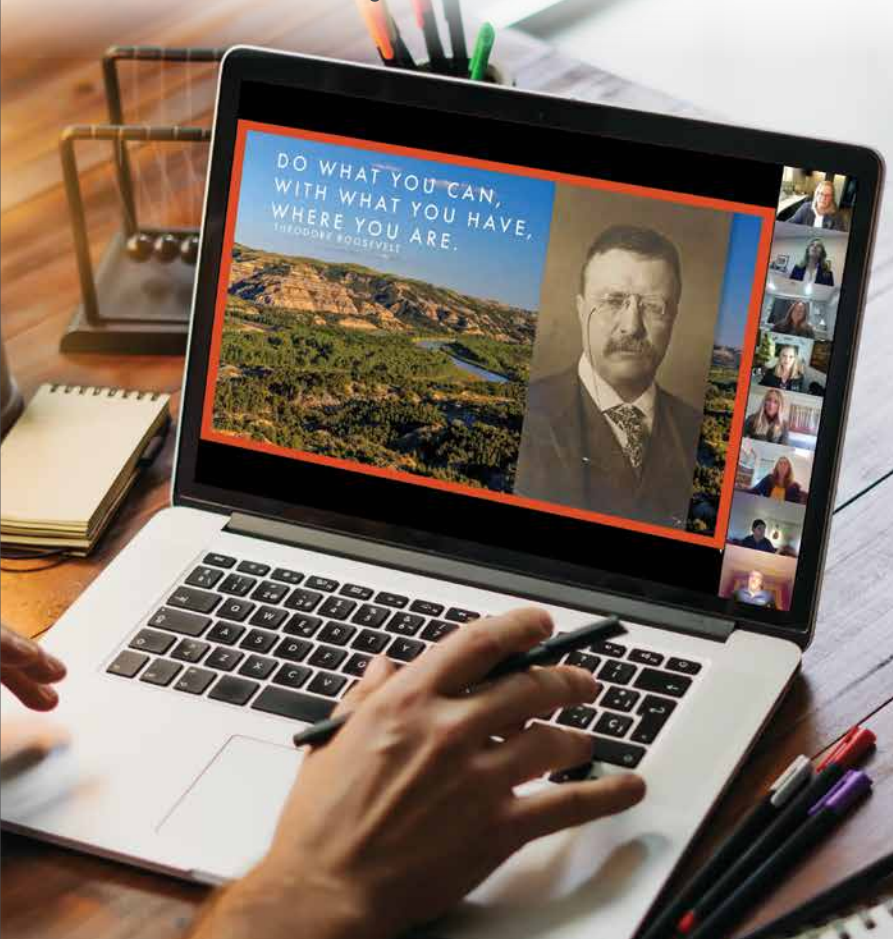


NORTH DAKOTA GAME AND FISH REPORTS STRONG LICENSE SALES:

- Nonresident waterfowl licenses **+16%**
- Nonresident small game licenses **+13.7%**
- Nonresident fishing licenses **+8%**

PARTNER SUPPORT

North Dakota Tourism staff works to identify, build and sustain strong relationships with tourism and industry partners around the state. They are also at-the-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.



18

IN 2020, NORTH DAKOTA TOURISM HOSTED 18 ONLINE INDUSTRY CALLS AND PRESENTATIONS.



TOURISM PROVIDES AN INDUSTRY NEWSLETTER WITH AN AVERAGE OPEN RATE OF 22%.



NINE PROJECTS WERE AWARDED MAIN STREET TOURISM GRANTS, FOR A TOTAL OF \$72,000+, EXPANDING OFFERINGS ACROSS THE STATE.



HOSTED THE 2020 NDTIC AWARDS WHICH WERE HELD VIRTUALLY AND PRESENTED BY GOVERNOR DOUG BURGUM.

1,700+

PARTNER LISTINGS
IN TRAVEL GUIDE

1,800+

PARTNER LISTINGS
ON WEBSITE

ASSET BANK



"Wind Canyon in the South Unit of Theodore Roosevelt National Park" by Dave Bruner is the most downloaded image on Asset Bank. It is the winner of the 2014 Teddy Roosevelt National Park Contest, the new official image of the "Welcome to North Dakota" billboards used on state borders and the cover of the 2020 Tourism Annual Report.

Our online media gallery has transitioned to a statewide platform called Asset Bank. This new service allows for easier sharing and a boost to the visuals used across state government. Additionally, it increases the visuals available to partners, media and more.

6K+

USERS HAVE
ACCESSED SITE

13K+

ASSET
DOWNLOADS

64K+

DOWNLOADABLE
ASSETS

medialibrary.nd.gov

VISITOR SERVICES

Providing personal customer service to visitors and potential visitors is top priority at ND Tourism. We advise travelers on best routes, itineraries, attractions, events and communities to fit their interests and schedules. Our counselors commonly hear, "I'm so happy to talk to a real person!" which often results in a longer stay. There are more than two-dozen trip itineraries available on NDtourism.com which have been a popular request among potential visitors.

WE MAKE OURSELVES AVAILABLE TO VISITORS AROUND THE WORLD



TODAY'S TRAVEL COUNSELING TAKES PLACE ONLINE AND OFFLINE, THROUGH PHONE, MAIL, EMAIL, SOCIAL MEDIA AND ONLINE TRAVEL FORUMS.



30,640

TRAVEL GUIDES
DISTRIBUTED
THROUGH REST AREAS



239,467

REFERRALS TO
PARTNER WEBSITES

SUNFLOWER MAILBOXES

Be Sunny.

North Dakota Tourism's popular sunflower campaign generates countless social media posts, shares and photos. It has earned national media attention, and most importantly, lured visitors from near-and-far to see fields of yellow blooms. This campaign includes a partnership with the National Sunflower Association and participating producers in development of an online map of sunflower fields where visitors are welcome. In 2020, mailboxes were added to a handful of fields in a pilot program, where visitors could sample sunflower seeds. It's just one more way of providing unmatched visitor service.



GOING BEYOND

The staff of North Dakota Tourism adapted to remarkable situations and created innovative ways to promote travel to the state. In addition, this team of highly skilled, professional marketers were called upon to assist the Office of the Governor, North Dakota Department of Health, Joint Information Center and other agencies and groups.

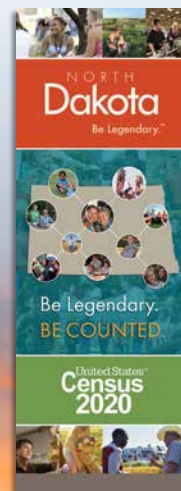
Those efforts included:



ND Smart Restart Materials



Care19 Marketing Materials



Census Materials



COVID-19 Business Briefings



Smart Business Pledge



NDResponse.gov Website



HOSPITALITY ECONOMIC RESILIENCY GRANTS (HERG, HERG PLUS)

Tourism marketing staff were instrumental in the marketing, planning, execution and follow-through of the Economic Resiliency Grant programs which included the Hospitality Economic Resiliency Grant (HERG), Hospitality ERG PLUS and additional rounds of HERG funding, which are forthcoming.

HOSPITALITY ECONOMIC RESILIENCY GRANT (HERG)

966
APPROVED
APPLICATIONS
\$23.7M
AWARDED

HOSPITALITY ERG PLUS

197
APPROVED
APPLICATIONS
\$8.4M
AWARDED

A LEGENDARY INDUSTRY AT A GLANCE



18.7 MILLION

VISITORS IN 2020
A 21% DECREASE



\$2.1 BILLION

IN VISITOR SPENDING
A 31.8% DECREASE



\$218.9 MILLION

ESTIMATED STATE & LOCAL TAX
REVENUE – A 27.1% DECREASE



42,363

JOBS SUPPORTED BY THE
TRAVEL INDUSTRY



3,523,146

HOTEL ROOM NIGHTS SOLD
30.4% OCCUPANCY DECREASE



577,467

AIRPORT ARRIVALS
51.3% DECREASE



1,933,482

STATE AND NATIONAL PARK
VISITORS – A 0.32% INCREASE



129,207

CANADIAN BORDER CROSSINGS
– A 77.1% DECREASE

VISITOR SPENDING BRINGS OUTSIDE DOLLARS INTO NORTH DAKOTA'S ECONOMY.



\$289

MILLION IN
LODGING



\$637

MILLION IN
FOOD &
BEVERAGE



\$422

MILLION IN
TRANSPORTATION



\$298

MILLION IN
RECREATION



\$467

MILLION IN
RETAIL

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