

NORTH DAKOTA TOURISM UPDATE—Q4 2019

Area of Travel	4th Qtr 2019	4th Qtr 2018	% Change 19-18			
State Park Visitors	113,636	106,294	6.91%			
National Park Visitors	68,614	85,909	-20.13%			
Website Visits	144,309	179,137	-19.44%			
Major Attractions	1,179,367	1,374,003	-14.17%			
Local Visitor Centers	9,549	10,988	-13.10%			
Cumulative Lodging Tax	\$1,850,685.36	\$1,819,086.03	1.74%			
Canadian Border Crossings	128,470		-100.00%			
ND Airport Deplanements	295,087	272,135	8.43%			
Statewide Hotel Occupancy Rate						
October	59.7%	57.9%	1.8%			
November	49.9%	48.5%	2.7%			
December	41.3%	39.9%	3.4%			
Statewide ADR-Average Room Rate						
October	\$80.76	\$80.42	0.3%			
November	\$78.21	\$78.93	0.4%			
December	\$76.24	\$76.57	-0.4%			
Taxable Sales and Purchases	Arts, Entertainment & Recreation 2019 YTD thru 3rd QTR: \$94,997,559 down 4.53% from 2018 Accommodations & Food Services 2019 YTD thru 3rd QTR: \$1,383,906,655 up 4.79% from 2018					
				3rd Quarter 2019	3rd Quarter 2018	% Change
	Arts, Entertainment & Recreation			\$43,296,113	\$44,473,735	-2.65%
	Accommodation & Food Services			\$502,257,091	\$481,350,085	4.34%

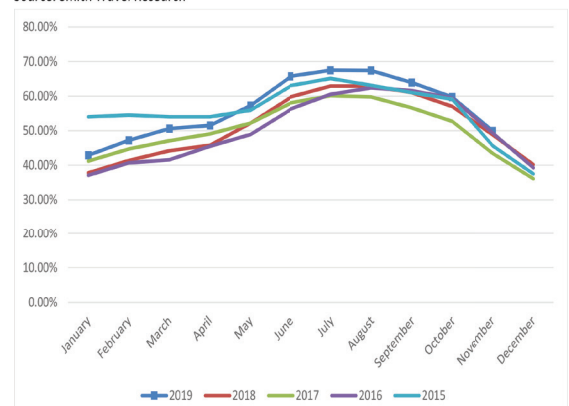
Q4 border crossing numbers
unreported at this time.

STATEWIDE UPDATES

- Economic impact research on 2018 was presented at the Travel Industry Marketing Summit on Oct. 8. Highlights include:
 - 22.6 million visitors spent \$3 billion across the state.
 - 4.1% growth in visitation from 2019 – up almost 1 million trips.
 - 81% of travel to North Dakota was for leisure and 19% business.
 - Details of spending by sector and county available in January.
- Williston Basin International Airport opened, claiming the fastest such build in US history.
- New Travel Matters videos were released, including Papa's Pumpkin Patch and Fluffy Fields.
- Governor's photo contest awarded 15 winners from more than 1,000 submissions and the best of show and best of decade photos.
- Main Street Summit included Tourism staff and partners who presented four breakout sessions highlighting the connection of tourism to healthy and vibrant communities.
- Trade mission to England, Ireland and Scotland included training more than 70 professionals and 12 product development meetings.
- Two group travel marketplaces, US Tour Operator Association's Marketplace and the National Tour Association resulted in 35 formal meetings and the creation of five new tours to add to the 11 returning tours.
- Attended Western Governors Association to promote attendance at the summer 2020 meeting in Medora.

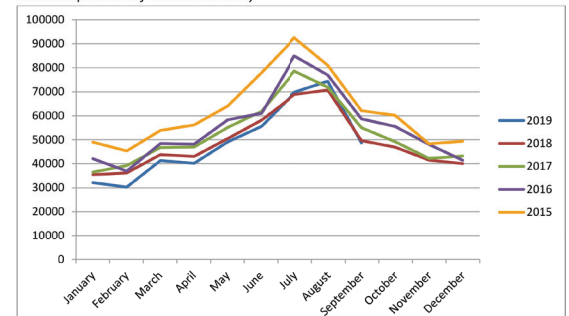
Monthly Statewide Hotel Occupancy (%), 2015-2019

Source: Smith Travel Research



Canadian Border Crossings (Autos), 2014-2019

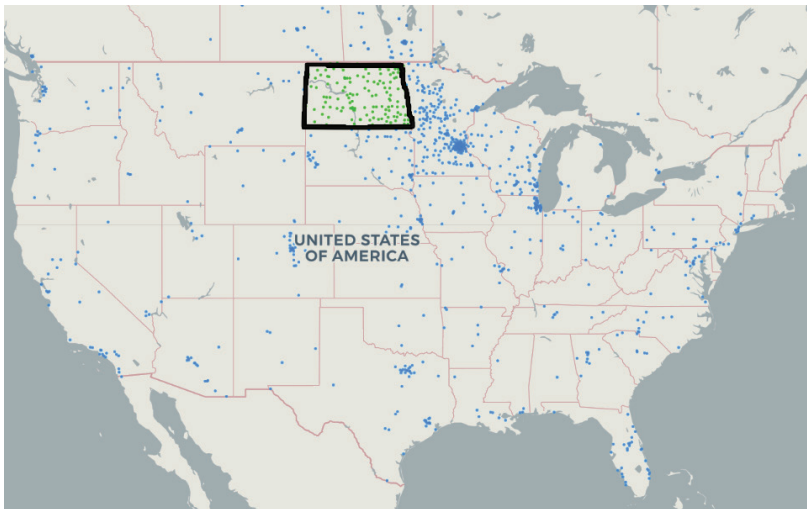
Source: Department of Homeland Security



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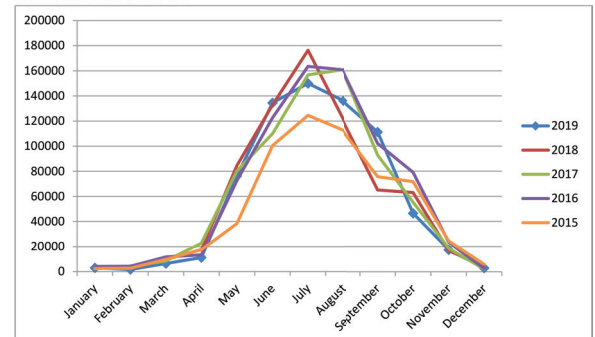
Q4 MARKETING EFFORTS

- Fourth-quarter advertising was focused on outdoor TV programming and sponsorships, netting approximately 11.7 million impressions.
- Tourism was advocated at the second Main Street Summit. Industry topics were Seasonal Events and Tourism Opportunities, Leveraging Unique Culture, Crafting and Telling your Community's Story and Managing Your Online Presence.
 - Presenters included Sara Otte Coleman, Matt Shanandore, Leanne Mellum, Ashley Schaan, Dave Pearce, Les Thomas, Darian Morsette, Sunna Furstenau, Acacia Stuckle, Carmen Rath-Wald, Selina Lafontaine, Kim Schmidt, Matt Chaussee, Chelsea Gleich, Heather LeMoine, Julie Obrigewitsch and Brooklyn Engelhart.
- A second campaign photo and film shoot took place in October, gathering new assets for the outdoors priority market. Shoots took place in the Donnybrook and Stanley regions.
- The 2020 Travel Guide and Hunting & Fishing Guide were produced, printed and delivered.
- Advertising exposure
 - 11,716,800 TV impressions



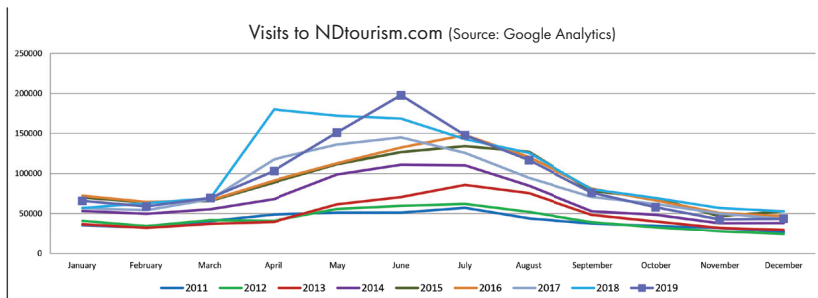
Arrivalist research records a 30% sample of phones/tablets/laptops arriving in North Dakota that have interacted with digital ads or content from NDtourism.com. There were 1,937 verified arrivals in Q4, a 43% increase over 2018. Blue dots show locations where ads were served. Green dots show where visitors arrived in North Dakota.

Theodore Roosevelt National Park Visitation, 2015-2019
Source: National Park Service



Region	Q4 2019	Q4 2018	%chg
North Dakota	27,899	37,991	-26.6%
Minnesota	20,359	25,648	-20.6%
Illinois	8,828	10,927	-19.2%
California	6,376	7,596	-16.1%
Texas	5,489	7,166	-23.4%
Nebraska	4,767	4,382	8.8%
Wisconsin	3,616	4,131	-12.5%
Florida	3,368	4,223	-20.2%
New York	2,695	3,558	-24.3%
Michigan	2,466	3,144	-21.6%

Signals of Intent to Travel Totals			
	Q4 2019	Q4 2018	%ch
Print Guide Orders	5,421	5,014	8.1%
eNews Signups	3,692	3,436	7.5%
Event Views	2,786	4,225	-34.1%



62% of traffic to NDtourism.com is from mobile

SOCIAL
MEDIA



68,128 fans



40,888 followers



31,772 followers