

# 2019 | 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

The end of another year – and the decade – provides a good time to reflect on why we do the work we do and maybe dispel a few myths.

Did you know that 22.6 million visitors traveled in North Dakota in 2018? Some might be surprised by that number, but if you ponder each of our 760,000 residents hosting 30 visitors, we're there. Think about our 22.6 million visitors spread out across our 70,762 square miles and compare that to Washington DC's industry, which welcomed about the same number in its 68 square miles.

The media has often cited that North Dakota is the least visited state. We cannot find that research. Someone once told me it was an old AAA study. Turns out, the data we can find shows that there are 11 states with less visitors than us, including Alaska, which reports 2.07 million visitors, Delaware, which cites 7.3 million and even Wyoming, where half of its 8.5 million visitors were drawn to Yellowstone National Park. Our sister state to the south also attracts fewer visitors than North Dakota, reporting 14 million.

The explanation can be found in our new research which shows visitor spending by sector and by county and confirms that North Dakota is a place people travel to. Whether you are a traditional summer vacationer from Chicago, a hockey family from Winnipeg taking your kids to tournaments, a marathon runner from Madison or a fisherman from Minneapolis, you have found your way to our state.

Our 2019 efforts were successful in reaching our target markets, as you will see in this report. And with our 2020 invitation to follow your curiosity not the crowds, we believe we will continue to inspire travelers to Be Legendary!

Tourism Director

Sara Otte Coleman



2019 Governor's Photo Contest winner, "Stormy Sunset" by Zachary Hargrove, as featured on the 2019 Annual Report cover. (L to R) Governor Doug Burgum; Sara Otte Coleman, Commerce; Kim Konikow, Council on the Arts; Gene LaDoucer, AAA North Dakota

## RESEARCH

The latest economic impact research was delivered in 2019, showing that growth returned to North Dakota's travel industry in 2018, moving past the oil boom-and-bust cycle of the mid-2010s.



**22.6 MILLION**  
VISITORS – AN INCREASE OF  
**1 MILLION**



**\$3 BILLION**  
IN VISITOR SPENDING  
**A 5.2% INCREASE**



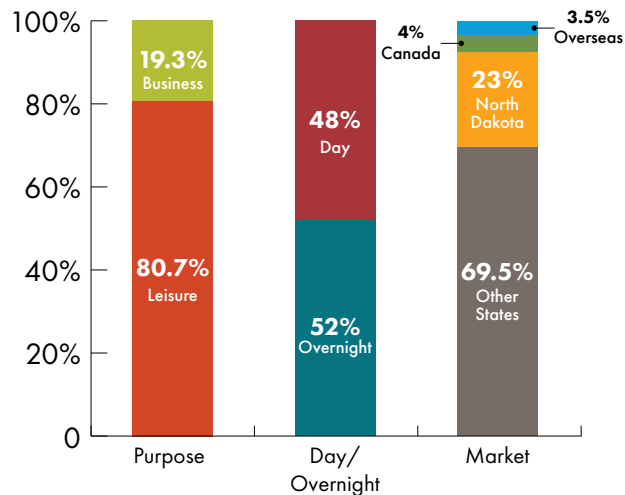
**\$300.5 MILLION**  
IN STATE AND LOCAL TAX  
REVENUE – **A 4.8% INCREASE**



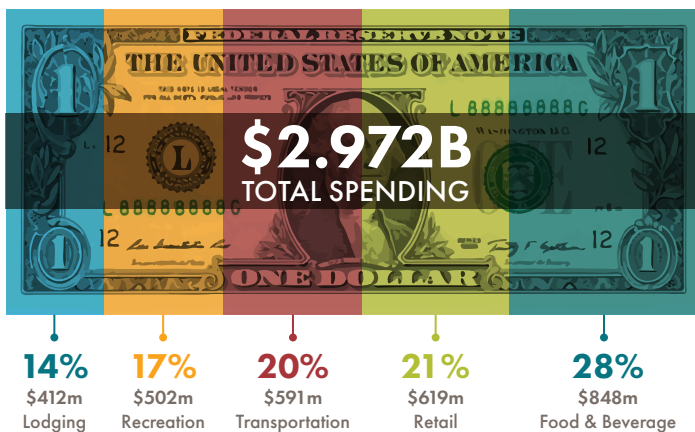
## Highlights from the Economic Impact of Tourism in North Dakota.

## Arrivalist

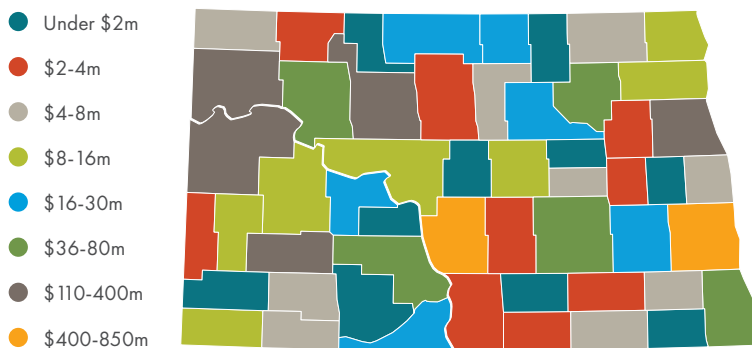
TOURISM INDUSTRY SALES BY MARKET SEGMENT, 2018



TOURISM INDUSTRY SALES IN NORTH DAKOTA, 2018



TRAVEL AND TOURISM IMPACT ACROSS THE STATE



Visitor spending grew an average of 5.2% 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%



Arrivalist is a technology that tracks actual arrivals in North Dakota after exposure to digital advertising and NDtourism.com through mobile devices. In 2019, 77 million exposures and 14,809 verified arrivals were recorded, representing approximately 30% of digitally exposed devices.

- 1.83% increase
- Blue dots represent location of exposure to digital content; green dots represent in-state arrival



HOSPITALITY AND  
LEISURE SALES TAX  
GENERATED

**\$1.48  
BILLION**

THROUGH Q3  
**AN INCREASE OF 3.73%**

# ADVERTISING & MARKETING

## INSPIRING TRIPS TO NORTH DAKOTA AND CONNECTING TRAVELERS WITH BUSINESSES.

North Dakota Tourism implemented the refreshed state brand across all promotions and advertising, activating a new chapter and message for visitors, job seekers, new citizens, investors and more. The active brand promise – Be Legendary – is a promising and inspirational call-to-action with a unified mission.



Full-page ads



Airport billboard



Digital ads



Television ads



Visitor guides



Newspaper advertorial

ADVERTISING BUDGET  
**\$3.26 MILLION**

### REACH



TV

**67,303,796**

58% increase in website referrals from vanity URL



PRINT

**11,941,059**

1.5% decrease in website referrals from vanity URL



OUT-OF-HOME

**34,004,871**



DIGITAL

**111,926,366**

112% increase in web traffic from Google CPC



SOCIAL MEDIA

**5,294,348**

CTR of 1.61% is almost double industry average

### INTEND TO TRAVEL METRICS

#### WEBSITE TRAFFIC

USERS

**892,639**

3.89% decrease

SESSIONS

**1,131,711**

8.59% decrease

PAGEVIEWS

**1,995,251**

11.14% decrease

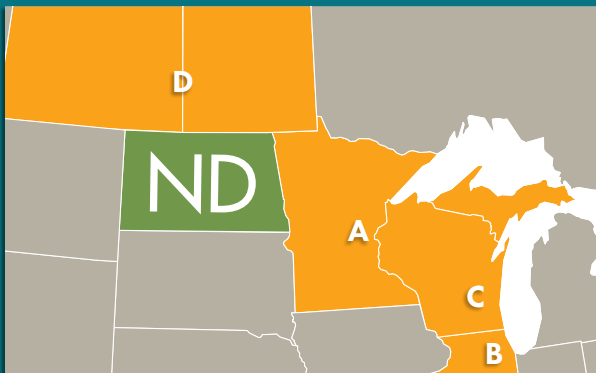
#### TRADITIONAL INQUIRIES

**56,389**

44.6% increase



## INFLUENCE IN OUR TARGET MARKETS



### A. Minneapolis–St. Paul

Broadcast TV, sponsorships, newspaper, magazine, out-of-home, digital, social media, sport shows

- 11.2% increase in web traffic
- 4.8% increase in verified arrivals

### C. Wisconsin

Broadcast TV, newspaper, magazine, out-of-home, digital, social media, sport show

- 4.9% increase in web traffic
- 11% increase in verified arrivals

### B. Chicago

Cable TV, newspaper, magazine, out-of-home, digital, social media, sport shows and experiential event

- 2% increase in web traffic
- 22.2% increase in verified arrivals

### D. Manitoba-Saskatchewan

Newspaper, magazine, digital, social media

- 3.2% decrease in border crossings – but monthly increases seen in second half of the year
- 40% decrease in site traffic
- 52% increase in verified arrivals



Blue Line Metro Train, Minneapolis



Union Station Takeover, Chicago



Two-page magazine advertorial



Broadcast and cable television



# 518,472

SUBSCRIBER  
NEWSLETTERS/  
EMAILS SENT

- 18% increase in subscribers
- 25.16% average open rate
- 28% increase in website referrals

FOR EVERY  
\$1 INVESTED  
IN TOURISM  
ADVERTISING



NORTH DAKOTA  
RECEIVES  
\$6 IN VISITOR-  
GENERATED TAX  
REVENUE





# PUBLIC RELATIONS



MIDWEST TRAVEL NETWORK ATTENDEES  
ENJOYED THEIR TIME IN NORTH DAKOTA!

24

DOMESTIC MEDIA  
TRIPS HOSTED



2.09 BILLION  
TOTAL READERS/  
VIEWERS

\$

\$19.3 MILLION  
IN EDITORIAL VALUE

Tourism implemented a pilot influencer program in 2019 that was a successful benchmark for 2020's influencer co-op program. This program included four key partnerships with recognized travel influencers that generated an estimated:

- 62.5 million impressions through influencer-led earned media placements
- 331,000 impressions through blog posts
- 6,000 social media engagements

"The people were kind, the air was clean, and the landscape was breathtaking ... The views, the colours, nature: it was all beyond words ... I left North Dakota feeling fulfilled and re-centered ... " – Conde Nast Traveler

Condé Nast  
**Traveler**

" Fargo is an amazingly supportive community that embraces their kitschy and weird reputation and that's reflected in the local brewery scene as well." – Forbes

**Forbes**

"North Dakota is a treasure trove, not only of activities, but coffee lovers rejoice, Bismarck has great coffee and they open up early. The food and art scene shouldn't be dismissed either." – Walking On Travels

Walking On  
**TRAVELS**

"North Dakota actually ranks in the top-two for sunflower production year-over-year, so travelers are venturing to the state to take in the picturesque view." – CNN Travel

**CNN** travel



# SOCIAL MEDIA

The goal of North Dakota Tourism's social media presence is to inspire potential out-of-state travelers to create their own legendary adventure in North Dakota through education, high-quality visual assets and quality customer service.

**141,500**



FOLLOWERS

**20%**



GROWTH YOY

**23,000,000**



IMPRESSIONS

**500,000 +**



VIDEO VIEWS

## SUNFLOWER SUCCESS

The partnership between North Dakota Tourism and the National Sunflower Association helped residents and potential visitors discover beautiful sunflower fields across the state. The campaign was picked up by 26 media outlets reaching more than 21 million people with an advertising equivalency value of \$197,500. Combined with a very successful social campaign that garnered 300,000 impressions, the weekly updated sunflower map had more than 15,000 visits to the website. This was the top-read webpage in August.



## OUTDOORSND CONTINUES GROWTH

With almost 20,000 followers, our hunting- and fishing-focused OutdoorsND channel has seen tremendous growth and interest. To capitalize on this, OutdoorsND is launching new channels and a 2020 paid advertising effort to capitalize on this highly engaging, niche audience.

# BY THE NUMBERS

## NORTH DAKOTA TRAVEL INDUSTRY

Travel Segment	2018	2019	+/-
State Parks	1,390,966	1,204,518	-3%
National Parks	782,328	722,630	-5%
Major Attractions	4,564,301	4,267,450	-8%
Visitor Centers	86,790	99,984	+6%
Canadian Border Crossings	584,855	566,274	-3%
Deplanements	1,081,269	1,187,274	+8%
Lodging Tax	\$6,568,173	\$6,752,086	+4%
Statewide Hotel Occupancy Rate	51.3%	55.3%	+8%

## TAXABLE SALES & PURCHASES THROUGH 3RD QTR 2019

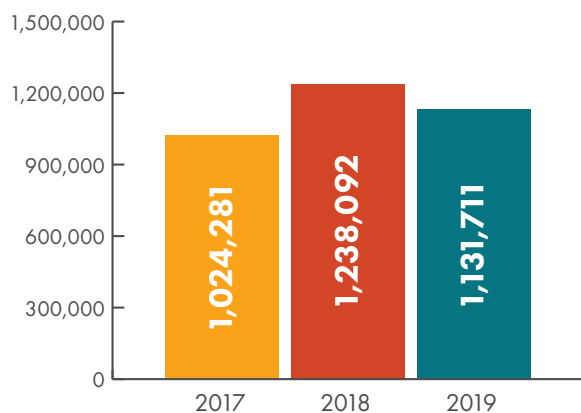
### Accommodations/Food Services

2018	2019	+/-
\$1,326,090,121	\$1,383,906,655	+4.36%

### Arts/Entertainment/Recreation

2018	2019	+/-
\$99,502,061	\$94,997,559	-4.53%

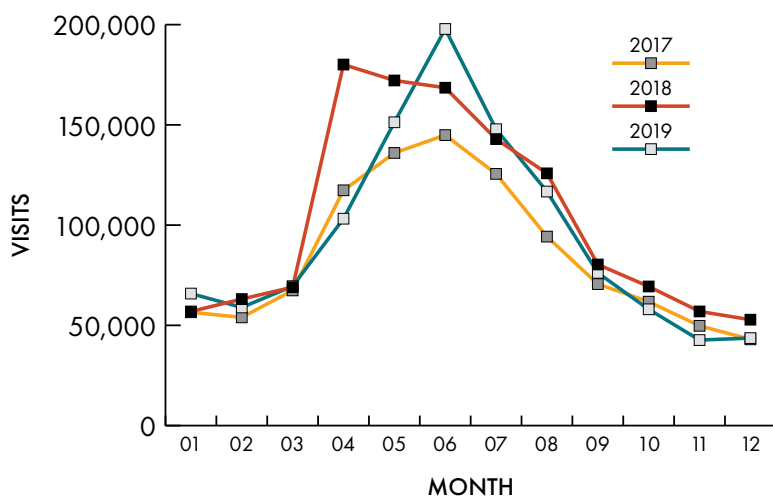
## TOTAL WEB VISITS BY YEAR



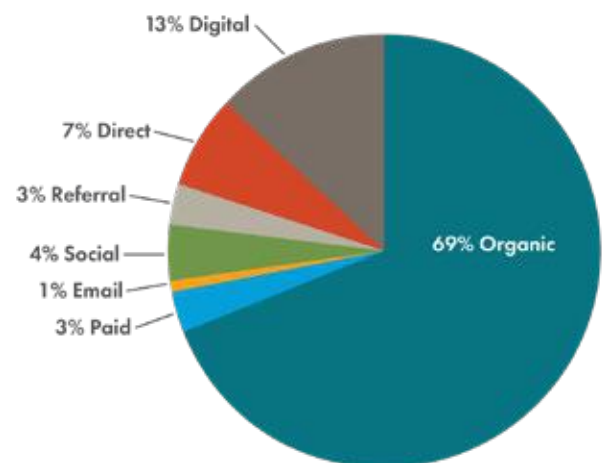
## TOP LOCATIONS FOR WEBSITE TRAFFIC

Rank	Location	Rank	Location
1	North Dakota	6	Nebraska
2	Minnesota	7	Texas
3	Illinois	8	Manitoba
4	Wisconsin	9	Saskatchewan
5	California	10	Florida

## TOTAL WEB VISITS BY MONTH

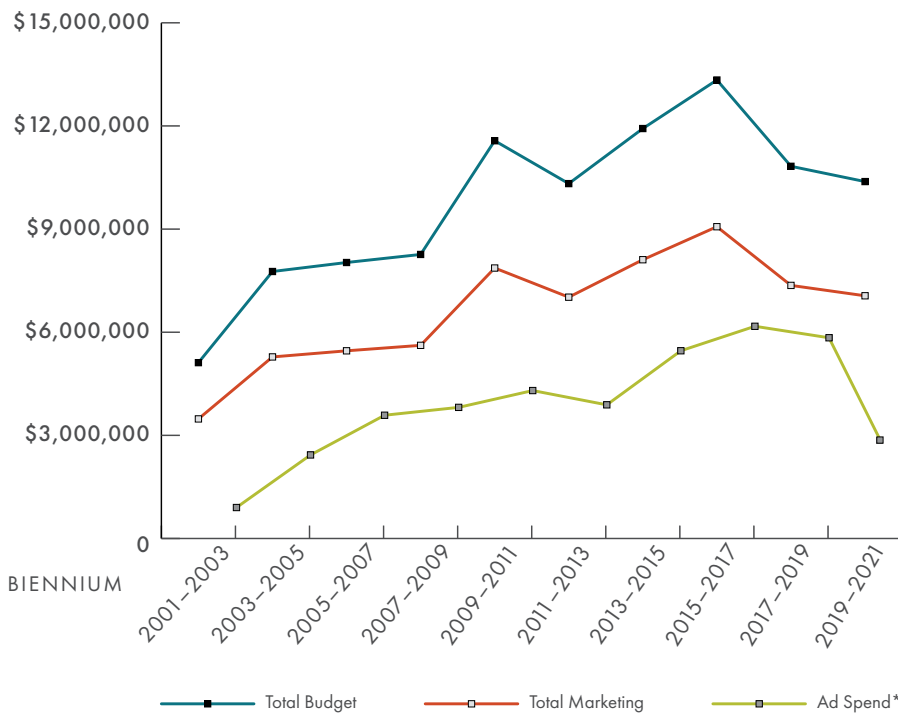


## ORIGIN OF SITE TRAFFIC FOR NDtourism.com





## NORTH DAKOTA TOURISM BUDGET HISTORY



\*Ad spend years offset from biennium years because main advertising season happens before the beginning of a biennium (i.e. 2017-2019 biennium funds 2018-2019 ad spend)

## BUDGET COMPARISONS BY STATE

State	Annual Budget (USTA) \$M	Visitor Spending (USTA) \$B	Self-Reported TSA Visitation*
North Dakota	\$4.4	\$2.9	22.6M
South Dakota	\$15.7	\$2.8	14M
Montana	\$17.5	\$4.57	11.7M
Minnesota	\$14.6	\$14.6	30.9M
Wyoming	\$12.2	\$3.39	8.5M
Nebraska	\$5.6	\$5.14	20M
Idaho	\$12.6	\$4.79	33M

\*Thrillist

For a complete list of references used to compile the data contained within this report, please email us at [marketing@nd.gov](mailto:marketing@nd.gov) or call 1-800-435-5663.

## IS NORTH DAKOTA THE LEAST-VISITED STATE?

Visitor spending is one way to compare travel between states, as reported through national surveys conducted by U.S. Travel, the Bureau of Labor Statistics' Survey of Consumer Expenditures, Smith Travel Research's Hotel and Motel Survey, TNS' TravelAmerica Survey and the U.S. Department of Commerce's Office of Travel and Tourism Industries.

According to the U.S. Travel Association's most recent data (2017), North Dakota ranks 46th in travel, of the 50 states and District of Columbia.

Rank	State	2017\$(m)
1	California	\$139,939.9
2	Florida	\$98,578.4
3	New York	\$79,132.7
4	Texas	\$72,483.3
5	Nevada	\$41,484.7
40	Idaho	\$4,788.6
41	Montana	\$4,572.5
42	New Hampshire	\$4,209.4
43	Maine	\$4,165.8
44	West Virginia	\$4,021.1
45	Wyoming	\$3,392.2
<b>46</b>	<b>North Dakota</b>	<b>\$2,913.7</b>
47	South Dakota	\$2,854.9
48	Alaska	\$2,727.4
49	Vermont	\$2,556.6
50	Delaware	\$2,202.0
51	Rhode Island	\$2,160.0



HOSTED REPRESENTATIVES OF THE NEW  
NORDIC MARKET FOR GREAT AMERICAN  
WEST AND NORTH DAKOTA.



**\$513,615**

IN EARNED EDITORIAL  
COVERAGE, REACHING

**12.5 MILLION**

READERS FROM

**102 STORIES**

**22%**

INCREASE IN TOUR OPERATORS  
SHOWCASING NORTH DAKOTA  
YOY. OVERNIGHT STAYS UP 54%.

**\$2M**

ESTIMATED VISITOR SPENDING  
FROM 7 OVERSEAS MARKETS  
THROUGH RELATIONSHIPS WITH  
TOUR OPERATORS. UP MORE  
THAN 14% YOY.



ONE PRESS TRIP  
**HOSTING FOUR  
JOURNALISTS**

FROM DIFFERENT  
MARKETS GENERATED

**\$175,000+**

IN ADVERTISING  
EQUIVALENCY PLUS  
SOCIAL MEDIA  
PRESENCE FROM **EACH**.



# GROUP

**54 NEW TOURS**  
CAME TO NORTH DAKOTA  
IN 2019 RESULTING IN  
**\$987,225**  
IN REVENUE.



Family Motor Coach Association's 100th rally was held in Minot with North Dakota State Fair, Minot CVB, Williston CVB and Turtle Mountain Tourism welcoming more than **1,900 RVers and 3,900 people**. This event had the highest attendance of first-time members of any FMCA event. Pre- and post-rally tours crossed the entire state. The average time spent in North Dakota was 2½-3 weeks.

**250+**

PRODUCT DEVELOPMENT MEETINGS WITH TOUR OPERATORS, RECEPTIVE OPERATORS AND TRAVEL INDUSTRY LEADERS.

**\$3.8**  
MILLION

ECONOMIC IMPACT OF 301 TOURS THROUGH 134 COMMUNITIES AS REPORTED BY TOUR COMPANIES IN 2019.



ONE PRODUCT DEVELOPMENT FAMILIARIZATION TOUR LED TO THE IMMEDIATE DEVELOPMENT OF 2 TOURS TO NORTH DAKOTA. THE 2019 TOUR BROUGHT IN 50 PEOPLE FOR 2 NIGHTS AND 6 SITE VISITS. THIS COMPANY HAS A 4-NIGHT TOUR SCHEDULED FOR 2020.

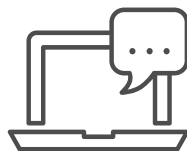


# OUTDOOR

Sharing North Dakota's vast outdoor recreational opportunities to media and travels through media content and participation in high-attendance outdoor and hunting and fishing shows.



**BROUGHT IN 6 MEDIA** representing Ducks Unlimited, Field & Stream, American Waterfowler, The Flush, Midwest Hunting & Fishing and On Wisconsin Outdoors.



**CONTINUED TO GAIN VALUABLE EDITORIAL CONTENT** through partnerships with Jason Mitchell Outdoors and Ron Schara Productions.



**WORKED 6 SPORTSHOWS** with a total of 11 partners who either worked alongside tourism staff or sent brochures to the following shows:

- Star Tribune Vacation & Travel Experience
- Chicago Travel & Adventure Show
- St. Cloud Sportsmen's Show
- Wisconsin Fishing Expo
- Sioux Empire Sportsmen's Show
- Northwest Sportshow Minneapolis

## INCREASE IN NONRESIDENT GAME & FISH SPENDING

New North Dakota Game and Fish research released in 2019 shows nonresidents are spending more money in North Dakota on hunting and fishing than they had in previous years. Nonresident hunters spent **6% more** and nonresident anglers spent **66% more** over the previous survey.



# PARTNER ENGAGEMENT

At North Dakota Tourism, our job is to inspire travel to North Dakota and provide resources for visitors to plan their trips here. We rely 100% on our partner attractions, event planners, accommodation hosts, guides, restaurateurs and visitor center staffs to deliver on our brand promise, who together show visitors how to Be Legendary!

**2,000+**

PARTNER LISTINGS  
ON WEBSITE

**1,700+**

PARTNER LISTINGS  
IN TRAVEL GUIDE

## # OF PARTNERS IN COOP ADVERTISING/ SALES PROGRAMS

	2018	2019
Regular Coop	12	10
Global	4	4
Outdoor	12	11
PR	1	2
Social	5	1

## TRAVEL MATTERS VIDEO SERIES



Travel Matters tells the personal stories behind the advocates, business owners and community leaders of North Dakota, while uplifting and empowering our partners and advocating for the state as a whole.

**10**

STORIES  
PUBLISHED

**86K**

VIDEO  
VIEWS

**15K**

WEBPAGE  
VIEWS

TIME SPENT ON PAGE IS  
**MORE THAN TWICE**  
THE AVERAGE SITE-WIDE

MEDIA ASSETS CREATED  
PROVIDE PARTNERS WITH  
**FREE, QUALITY CONTENT**



# VISITOR SERVICES

## PERSONAL SERVICE HELPS VISITORS PLAN THEIR NORTH DAKOTA TRIPS

Providing personal service to visitors and potential visitors is top priority at ND Tourism. We take pride in advising travelers on best routes, attractions, events and communities to fit their interests and schedules. Our counselors often find that with a few suggestions a quick trip can turn into a longer adventure. Today's travel counseling takes place by phone, through mail, email, social media, online travel forums, at shows, special events and even walk-in office traffic.



141

PARTICIPANTS IN THE REST AREA  
LITERATURE RACK PROGRAM

## LEADING STATES REQUESTING TRAVEL GUIDES



MINNESOTA



WISCONSIN



ILLINOIS



MICHIGAN



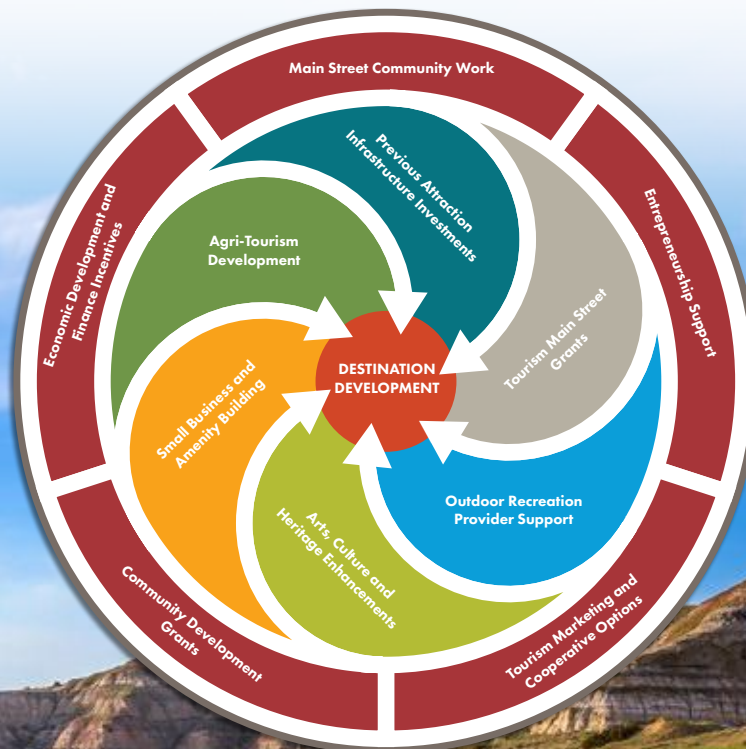
OHIO



## DESTINATION DEVELOPMENT AND MARKETING IS CRITICAL FOR NORTH DAKOTA'S ECONOMY.

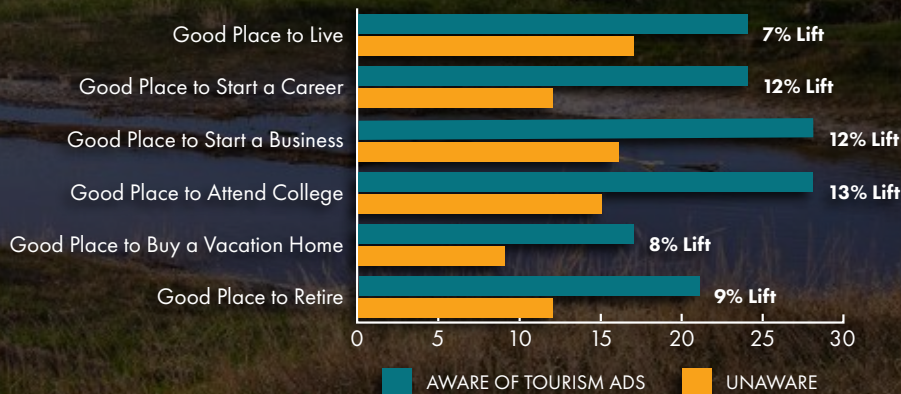
Developing (and then marketing) North Dakota as a destination is not only critical for attracting visitor revenue - but also essential for sustaining vibrant communities and attracting and retaining quality workers needed to drive our economy.

The chart shown below shows that many pieces flow into successful destination development.



## TOURISM MARKETING HALO EFFECT

Tourism advertising has been shown to boost a state's image. According to Longwoods International, this "halo effect" of tourism marketing not only lifts visitation but positively impacts key economic development measures.





# A LEGENDARY INDUSTRY AT A GLANCE



**22.6 MILLION**  
VISITORS – AN INCREASE OF  
1 MILLION



**\$3 BILLION**  
IN VISITOR SPENDING  
A 5.2% INCREASE



**\$300.5 MILLION**  
IN STATE AND LOCAL TAX  
REVENUE – A 4.8% INCREASE



**45,640**  
JOBS SUPPORTED BY THE  
TRAVEL INDUSTRY



**4,998,123**  
HOTEL ROOM NIGHTS SOLD  
8% OCCUPANCY INCREASE



**1,186,732**  
AIRPORT ARRIVALS  
9.75% INCREASE



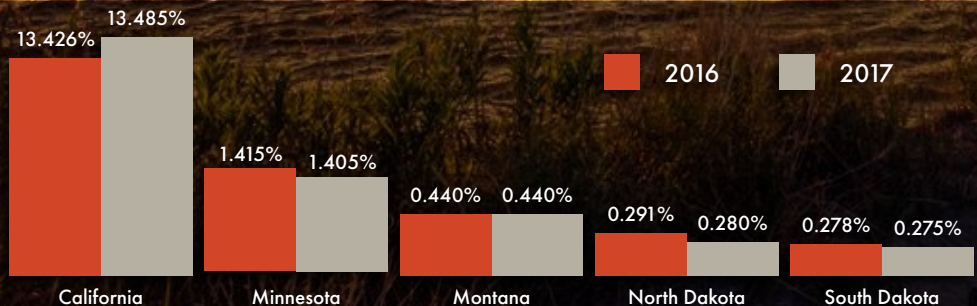
**1,927,148**  
STATE AND NATIONAL PARK  
VISITORS – A 4.03% DECREASE



**566,274**  
CANADIAN BORDER CROSSINGS  
– A 3% DECREASE

## U.S. TRAVEL MARKET SHARE

National travel expenditures topped \$1 billion in 2017, for the first time. California is the state with the largest share of travel in the U.S.



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@TravelND



@NorthDakotaLegendary



Travel North Dakota



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Travel North Dakota