

NORTH DAKOTA TOURISM UPDATE—Q1 2020

Area of Travel	1st Qtr 2020	1st Qtr 2019	% Change 20-19			
State Park Visitors	99,424	88,031	13%			
National Park Visitors	20,378	11,631	75%			
Website Visits	184,796	194,324	-5%			
Major Attractions	566,555	589,983	-4%			
Local Visitor Centers	7,838	8,672	-10%			
Cumulative Lodging Tax	\$1,338,578.23	\$1,365,495.60	-2%			
Canadian Border Crossing	89,467	103,706	-14%			
ND Airport Deplanements	277,023	287,551	-4%			
Statewide Hotel Occupancy Rate						
January	43.4%	42.5%	2.1%			
February	47.1%	46.7%	0.9%			
March	33.0%	50.6%	-34.8%			
Statewide ADR-Average Room Rate						
January	\$79.27	\$78.45	1.0%			
February	\$83.40	\$79.89	4.4%			
March	\$75.47	\$79.51	-5.1%			
RevPAR				\$32.86	\$36.81	-10.7%
Taxable Sales and Purchases						
			2019 YTD	2018 YTD	% Change	
Arts, Entertainment & Recreation			\$122,162,919	\$119,938,479	1.85%	
Accommodation & Food Services			\$1,834,041,363	\$1,766,444,579	3.83%	

STATEWIDE UPDATES

- March 13, a state of emergency was declared in North Dakota in response to the COVID-19 public health crisis.
- Prior to the March 13 declaration, website traffic was on par with 2019. Traffic significantly slowed at the end of March, resulting in an overall Q1 decrease of 4.9% compared to a year ago.
- Inquiries were down 13% for the quarter, with the decrease correlating to website traffic.
- North Dakota's subscriber email list continues to grow, and click-throughs to the website increased 44%.
- Appreciation for North Dakota's great outdoors was apparent during Q1. State park visitation increased 13% and Theodore Roosevelt National Park surged 75%.
- Deplanements at North Dakota's airports were trending 14% ahead of 2019 through February, but travel restrictions in March greatly impacted numbers, ending the quarter with a 3.47% decrease in overall inbounds.
- Canadian border crossings were up 5% in January and up 19% in February, but the March 18 announcement closing the border to recreational travel resulted in an overall 14% decrease for the quarter.
- The 2019 taxable sales and purchases report was released by the Office of the State Tax Commissioner, showing a 1.85% growth in sales related to arts, entertainment and recreation and 3.83% growth in accommodations and food services.

TRADITIONAL INQUIRIES

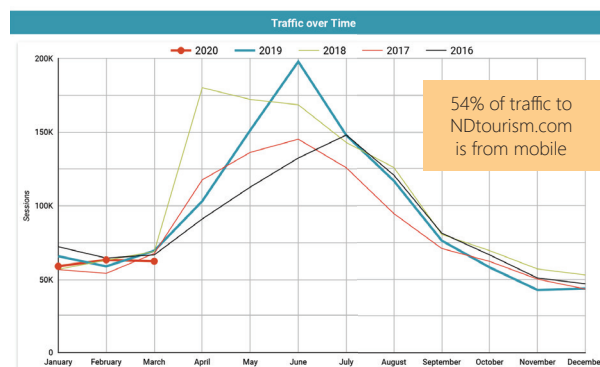
6,317 (↓13%)

E-NEWS SIGN-UPS

3,242 (↓23.1%)

PARTNER REFERRALS (WEB)

12,875 (↓20.1%)



Q1 MARKETING EFFORTS

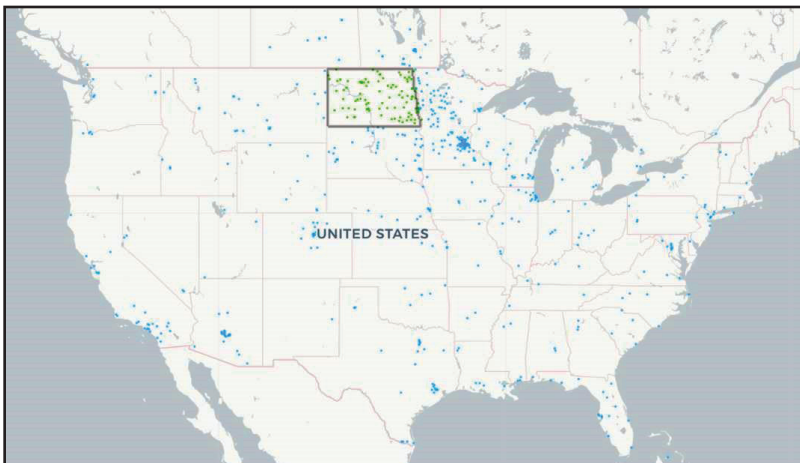
North Dakota's new advertising campaign, inspired by a "Follow your curiosity and not the crowds" theme was unveiled. Media coverage from the launch of the campaign reached 87 million with an ad equivalency of \$805,000. Total tourism media coverage from 1st quarter reached 400 million with an overall value of \$3,700,234.48.

The new campaign's initial launch began with television and digital placements, followed by early print placements:

- 1,036,800 impressions running with outdoors programming on Fox Sports Network
- 3,318,461 digital impressions with long-content articles on Nativio
- 3,071,314 print impressions with advertising in AAA Living, Live/Play AAA, Midwest Living's Best of the Midwest, Midwest Hunting & Fishing and Ducks Unlimited.

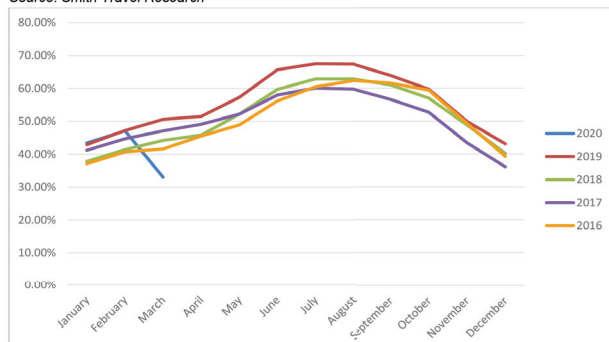
Internationally, efforts resulted in 81 media placements reaching 86,853,940 people with a value of \$1,188,299.63. International sales efforts took us to Italy and France where North Dakota was promoted to 33 tour companies, 90 tour operator representatives and 119 travel agents.

Exhibited at sport shows in Chicago, Minneapolis and Madison in February speaking to and distributing materials to over 3,000 outdoor enthusiasts that are planning to travel this year.



Arrivalist research records a 30% sample of enabled devices arriving in North Dakota that have interacted with digital ads or content from NDtourism.com. Q1 saw a 32% decrease in verified arrivals from the previous year. Blue dots show locations where ads were served. Green dots show where visitors arrived in North Dakota.

Monthly Statewide Hotel Occupancy (%)
Source: Smith Travel Research



The effects of the March 13 emergency declaration regarding the COVID-19 crisis show in hotel occupancy. Statewide occupancy fell to 33% in March.

SOCIAL MEDIA

- 66,545 fans
- 40,804 followers
- 32,960 followers

No social campaigns ran during Q1

TOTAL VIDEO VIEWS
103K (↑836%)

TOTAL IMPRESSIONS
2.41M (↑141%)

Top Performing Posts

