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

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

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 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.

**TOURISM ADVERTISING ELEVATES NORTH DAKOTA’S IMAGE**

**HALO EFFECT OF NORTH DAKOTA TOURISM MARKETING**

<table>
<thead>
<tr>
<th>Economic Development Attribute</th>
<th>Aware of ND Tourism Ads</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good Place to Live</td>
<td>12% Lift</td>
<td></td>
</tr>
<tr>
<td>Good Place to Start a Career</td>
<td>14% Lift</td>
<td></td>
</tr>
<tr>
<td>Good Place to Start a Business</td>
<td>16% Lift</td>
<td></td>
</tr>
<tr>
<td>Good Place to Attend College</td>
<td>15% Lift</td>
<td></td>
</tr>
<tr>
<td>Good Place to Buy Vacation Home</td>
<td>10% Lift</td>
<td></td>
</tr>
<tr>
<td>Good Place to Retire</td>
<td>8% Lift</td>
<td></td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Economic Development Attribute</th>
<th>Aware of ND Tourism Ads</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>A place with a promising economic future</td>
<td>11% Lift</td>
<td></td>
</tr>
<tr>
<td>A place with a strong and expanding job market</td>
<td>11% Lift</td>
<td></td>
</tr>
<tr>
<td>I’ve seen job opportunities located here</td>
<td>14% Lift</td>
<td></td>
</tr>
<tr>
<td>A place my family and I could be happy living</td>
<td>8% Lift</td>
<td></td>
</tr>
<tr>
<td>I’d consider moving there for the right job opportunity</td>
<td>18% Lift</td>
<td></td>
</tr>
<tr>
<td>I’d recommend moving here to friends/family</td>
<td>16% Lift</td>
<td></td>
</tr>
<tr>
<td>I’m interested in learning about work opportunities here</td>
<td>14% Lift</td>
<td></td>
</tr>
</tbody>
</table>

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**.
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.

**Intend to Travel Metrics**

- **Sessions**: 1,716,372 (51.66% increase)
- **Users**: 1,579,523 (76.95% increase)
- **Pageviews**: 2,209,869 (10.76% increase)
- **Website Traffic**: 34,094 (4% increase)

**Digital Native Advertising**
- Articles begin running

**In-State Print Campaign**
- With state-funded cooperative partnership runs

**New In-State TV Ad**
- With support of Josh Duhamel is developed and begins to run

**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

**New Campaign**
- Invites visitors to follow their curiosity not the crowds

Josh in the booth recording his voiceover.
**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

---

**REACH**
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.

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

**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

---

**PUBLIC RELATIONS**

**732** MEDIA PLACEMENTS

**1.35 BILLION** ESTIMATED AUDIENCE REACH

**$12.9 MILLION** IN EDITORIAL VALUE

**AWARD**

Midwest Travel Network

NORTH DAKOTA 2020 DESTINATION OF THE YEAR
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.

**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

**FOLLOWERS**

151,714

7% increase YOY

**WEB TRAFFIC**

49,485

22% increase YOY

**IMPRESSIONS**

15,313,814

**VIDEO VIEWS**

4,633,526+

**UGC TAGS AND ENGAGEMENTS**

300,000+

**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.
BY THE NUMBERS

NORTH DAKOTA TRAVEL INDUSTRY

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

TRAVEL & TOURISM IMPACT ACROSS THE STATE

- Under $2m
- $2-4m
- $4-8m
- $8-16m
- $16-30m
- $36-80m
- $110-400m
- $400-850m

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

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>+/-%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations/Food Services</td>
<td>$1,383,906,655</td>
<td>$1,116,571,135</td>
<td>-19.31%</td>
</tr>
<tr>
<td>Arts/Entertainment/Recreation</td>
<td>$94,997,559</td>
<td>$74,796,601</td>
<td>-21.26%</td>
</tr>
</tbody>
</table>

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.

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

**Pre-Pandemic:**
- Attended American Bus Association and Heartland Travel Showcase Conventions – Meeting with 60 operators and industry professionals.
- 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.

**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.**

**38**

**Represented North Dakota in 38 Women in Buses Meetings – Which includes tour and motorcoach operators, bus drivers, DMOS, suppliers and industry partners.**
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.

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.

**23,000 Guides added to North Dakota’s Rest Area Brochure Racks.**

**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.

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

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.

“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.

6K+ USERS HAVE ACCESSED SITE

13K+ ASSET DOWNLOADS

64K+ DOWNLOADABLE ASSETS

medialibrary.nd.gov
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.

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.
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:

**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

3,523,146
AIRPORT ARRIVALS
51.3% DECREASE

577,467
VISITORS IN 2020
A 21% DECREASE

577,467
IN VISITOR SPENDING
A 31.8% DECREASE

$2.1 BILLION
ESTIMATED STATE & LOCAL TAX
REVENUE – A 27.1% DECREASE

62
STATE AND NATIONAL PARK
VISITORS – A 0.32% INCREASE

129,207
CANADIAN BORDER CROSSINGS
– A 77.1% DECREASE

$422
MILLION IN
LODGING

$289
MILLION IN
FOOD &
BEVERAGE

$467
MILLION IN
RETAIL

$637
MILLION IN
TRANSPORTATION

$298
MILLION IN
RECREATION

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