

# Research and Resources

Sound research provides the basis for good marketing decisions. The Office of Tourism conducts studies that address economic impact and assess travelers' perceptions and motivations. In 2003, the Office of Tourism conducted a visitor intercept study to collect data on trip characteristics, advertising recall and demographics in constructing visitor profiles. In this section, you'll also find a plethora of information pertaining to trends at the national, international, regional and state level. Who are today's visitors? How do they choose a destination? Read on to find out more.



# National Outlook

This section looks at travel trends on a national and international level.

## Travel Forecast, 2003-2005

The Travel Industry Association of America (TIA) predicts travel in the U.S. will recover slightly in 2003 with both travel volume and expenditures increasing somewhat. Expected total travel expenditures in 2003 will be \$544.4 billion, a 3 percent increase over 2002. Total travel expenditures for 2004 are forecast to reach \$568.1 billion for a 4.4 percent increase over 2003. 2005 expenditures are forecast to reach an estimated \$594.3 billion. TIA expects spending by international travelers to outpace domestic traveler spending in 2004 and 2005.

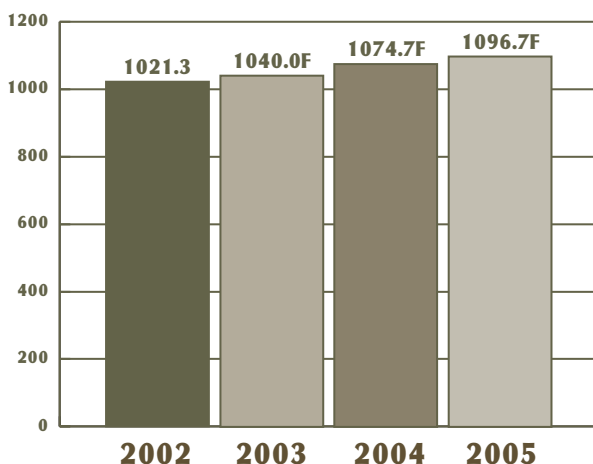
## Domestic Travel 2002 vs. 2001

- Total U.S. domestic travel volume is relatively flat over 2001 (+0.3%)
- Leisure travel volume is up nearly 2 percent over 2001
- Auto travel is up 2 percent over 2001

Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Total Domestic Person-Trips\*

(in millions)

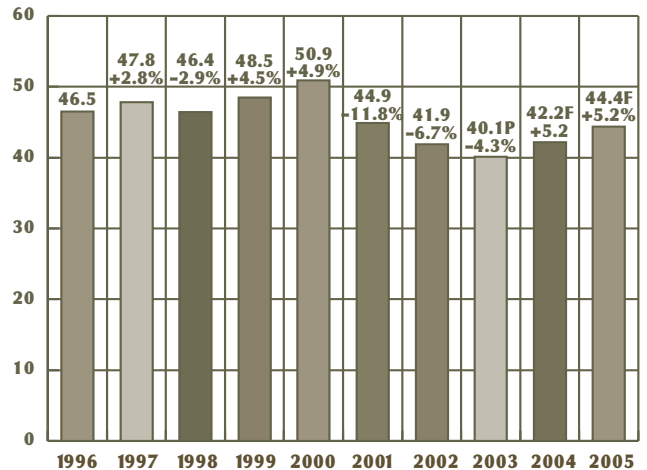


F=forecast

\*One person on one trip 50 miles or more (one way) away from home.

Source: Travel Industry Association of America's Travel Forecast

## International Travel to the United States (arrivals in millions)



P=Projection

F=Forecast

Source: Office of Travel and Tourism Industries/International Trade Administration, U.S. Dept. of Commerce

## Top 10 Generating Countries for U.S. (2002)

- |                   |                |
|-------------------|----------------|
| 1. Canada         | 6. France      |
| 2. Mexico         | 7. South Korea |
| 3. United Kingdom | 8. Australia   |
| 4. Japan          | 9. Italy       |
| 5. Germany        | 10. Brazil     |

Source: Office of Travel and Tourism Industries/International Trade Administration, U.S. Dept. of Commerce

## Economic Impact of Travel in the U.S., 2002\*

(Domestic and international travel)

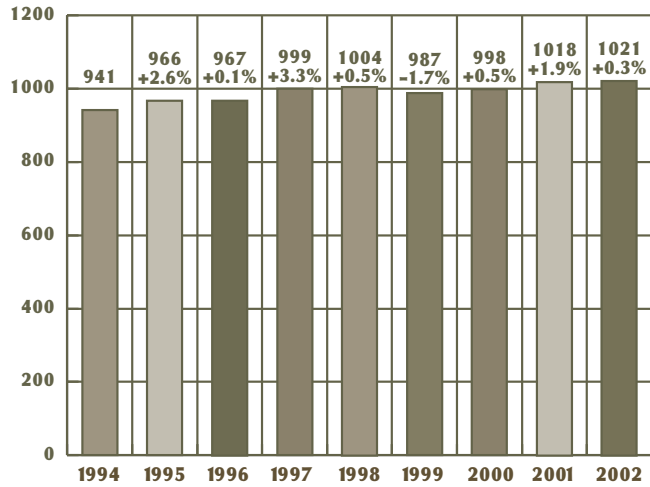
Travel expenditures . . . . . \$528.5 billion  
 Travel-generated tax revenue . . . . \$93.2 billion  
 Travel-generated employment . . . 7.2 million jobs  
 Trade surplus . . . . . \$5.5 billion

\* Preliminary data

Source: Travel Industry Association of America's Economic Impact of Travel and Tourism

## U.S. Domestic Travel Volume

Domestic travel in the U.S. has increased 8 percent from 1994 to 2002. (Person-trips in millions)

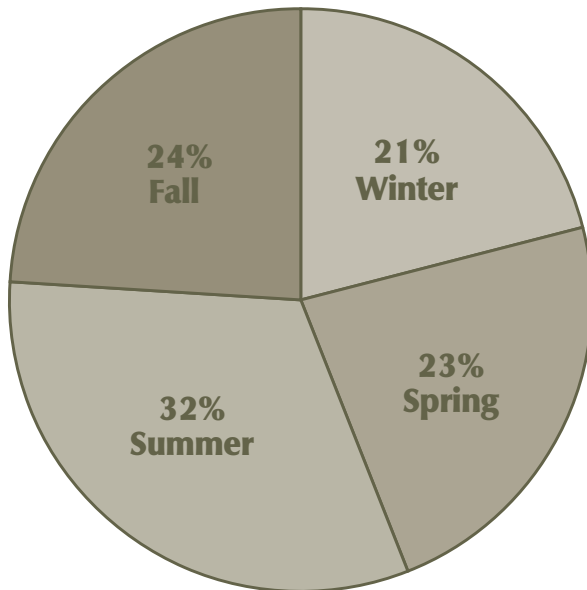


\*One person on one trip 50 miles or more (one way) away from home.

Source: Travel Industry Association of America's Domestic Research: Travel Volume and Trends

## Season of U.S. Travel in 2002

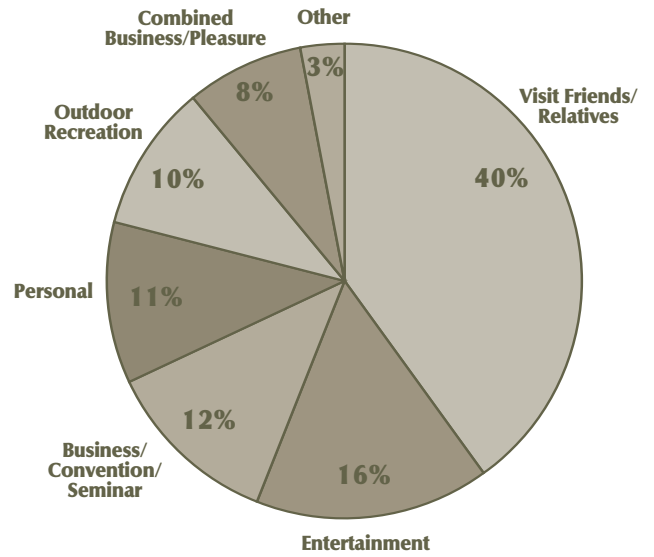
(% of person-trips)



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Primary Purpose of Travel, 2002

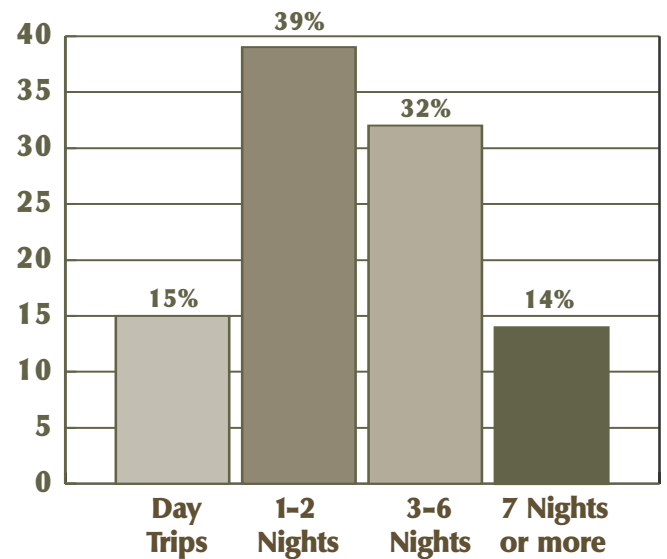
(percent of person-trips)



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

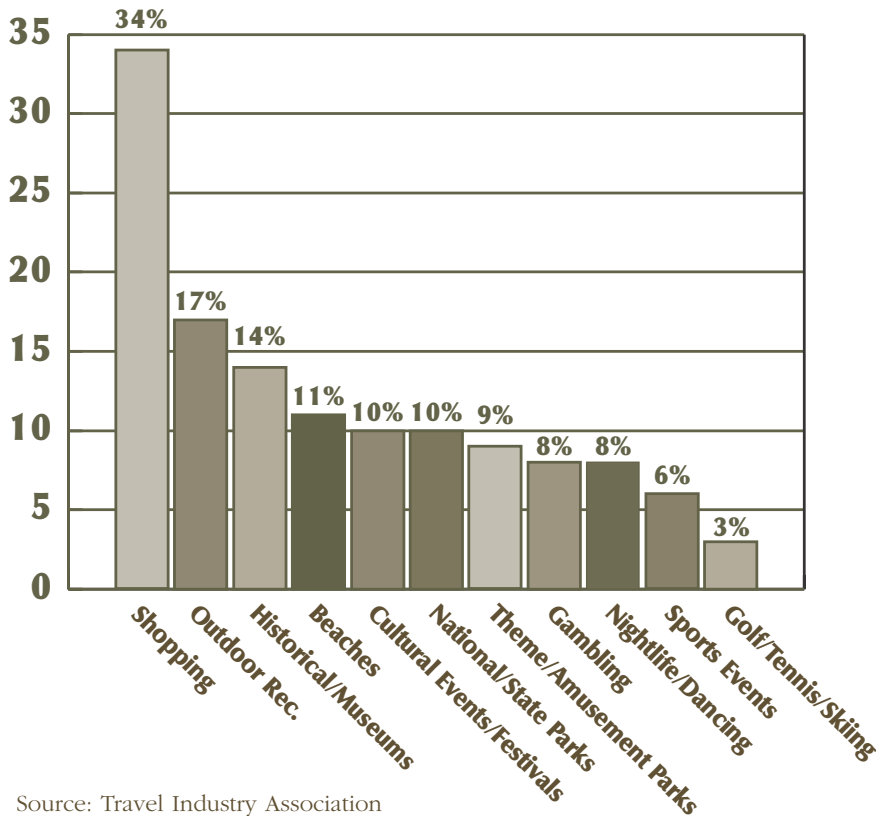
## Trip Duration in 2002

(% of Domestic U.S. Person Trips)



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Domestic Trip Activity Participation by U.S. Travelers in 2002 (% of person-trips)

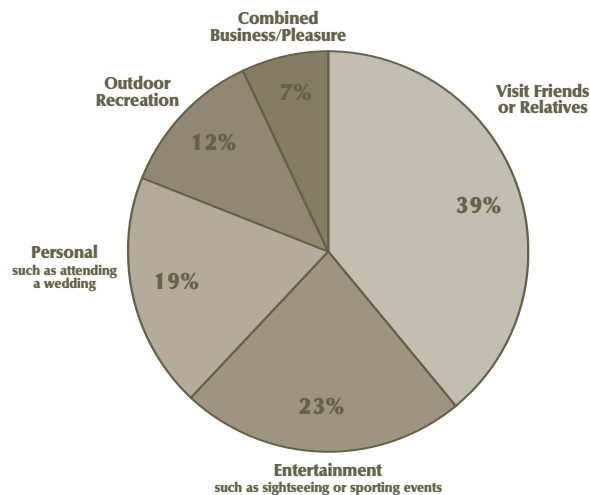


Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Last-Minute Travel

- 83.1 million adults (64 percent of past-year leisure travelers) planned at least one trip within two weeks of taking the trip.
- 17 percent of last-minute travelers used the Internet to make travel reservations.
- Most (70 percent) last-minute travelers drove their own car.

## Reasons for Taking Last-Minute Trips



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## U.S. Domestic Travel 2002 at a Glance

- Leisure travel accounts for 77 percent of all U.S. domestic travel, while business travel accounts for 12 percent. Eight percent of all travel combines business with pleasure.
- Auto travel, by car, truck or RV, accounts for 75 percent of all person-trips. Air travel accounts for 16 percent of all travel.
- Nearly four in 10 (39 percent) of all person-trips are short trips of one or two nights.
- More than half (55 percent) of overnight trips include a hotel, motel or bed-and-breakfast stay.
- Shopping is the most popular trip activity at 34 percent.
- On average, travel parties spend a total of \$457 per household trip, not including transportation to the destination.
- Four in 10 (44 percent) household trips are made by adults traveling alone or with someone outside their household, while about one-third (32 percent) are taken by multiple adults.
- One-quarter (24 percent) of household trips include children.
- Travel is most likely to occur in the traveler's own state, accounting for 46 percent of all person-trips.

Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Traveler Profiles by Age Group, 2002

### Profile of 2002 U.S. Domestic Traveler

- 64 percent married, 19 percent single/never married, 17 percent divorced, widowed, separated
- Average age: 47 (household head)
- 36 percent have children in the household
- Annual household income: \$56,600 median

### Demographics of Generation X and Y Traveling Households (Ages 18-34)

- 51 percent are married
- Average age: 29
- 43 percent have a child in the household
- 42 percent have an annual household income of \$50,000+

### Demographics of Baby Boomer Traveling Households (Ages 35-54)

- 73 percent are married
- Average age: 45
- 51 percent have a child in the household
- 68 percent have an annual household income of \$50,000+

### Demographics of Mature Traveling Households (Ages 55+)

- 64 percent are married
- Average age: 66
- 7 percent have a child in the household
- 52 percent have an annual household income of \$50,000+

Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

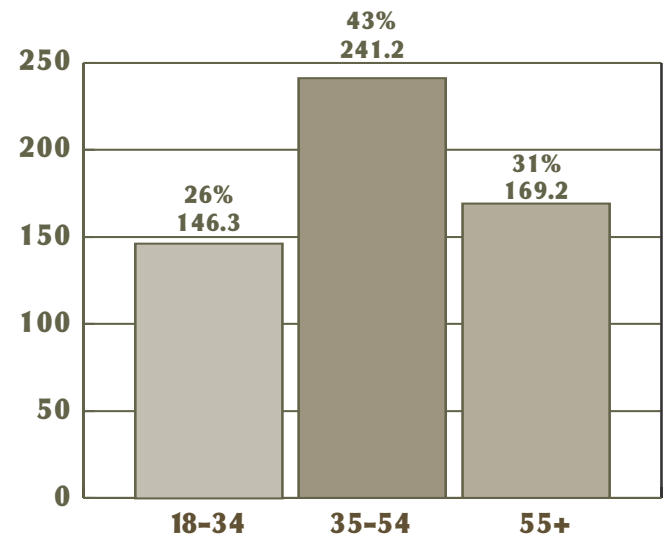
## Cash Flow

*Baby Boomers (ages 35-54) generate the highest travel volume in the U.S. They also spend the most per trip, an average \$491. Matures (ages 55+) spend an average \$468, while Generation X and Y travelers (ages 18-34) spend the lowest, an average \$391.*

Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Who Travels the Most?

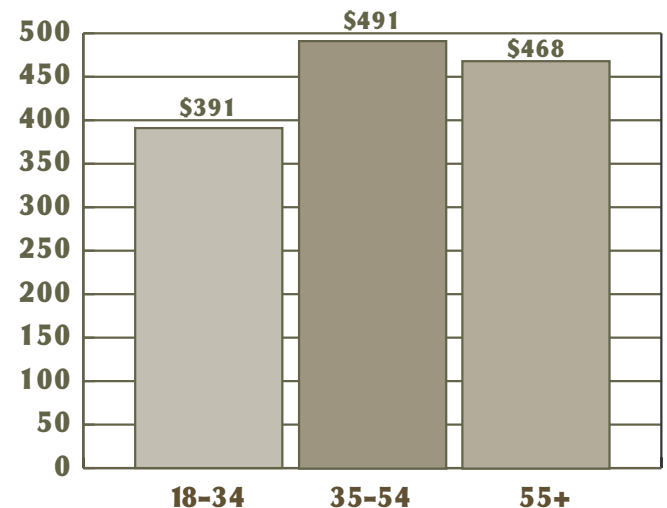
Volume of Travel by Age of Household Head, 2002 (Number of household trips in millions)



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

## Who Spends the Most?

Average Spending Per Trip by Age of Household Head, 2002



Source: Travel Industry Association of America's Domestic Travel Market Report, 2003 Edition

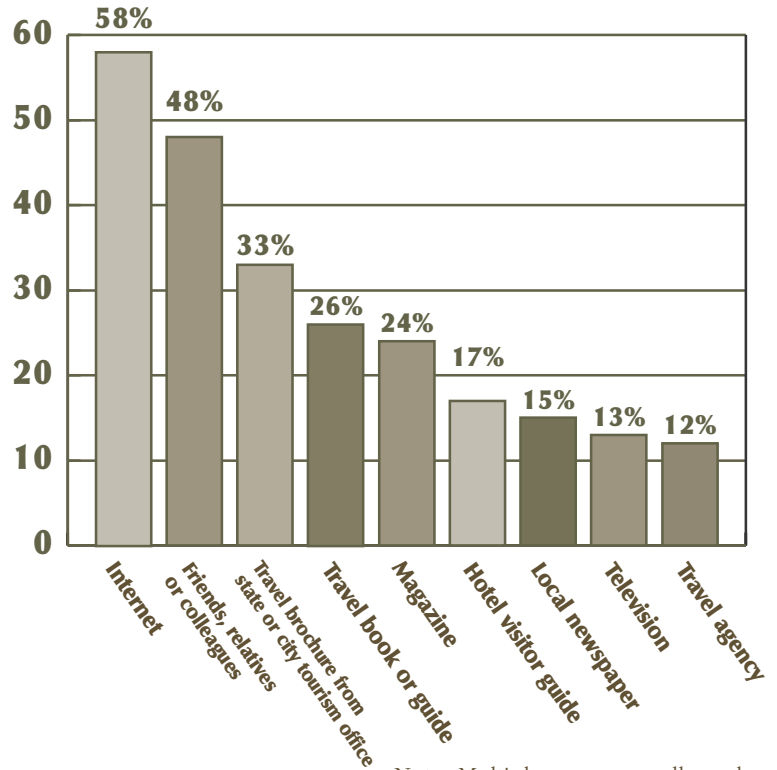
# Historic/Cultural Travel Market

Cultural, arts, historic and heritage activities are quite popular among today's domestic travelers. Remarkably, most (81 percent) of the 146.4 million American adults who traveled in the past year can be considered as historic/cultural travelers.

## Demographics of Historic/Cultural Traveler

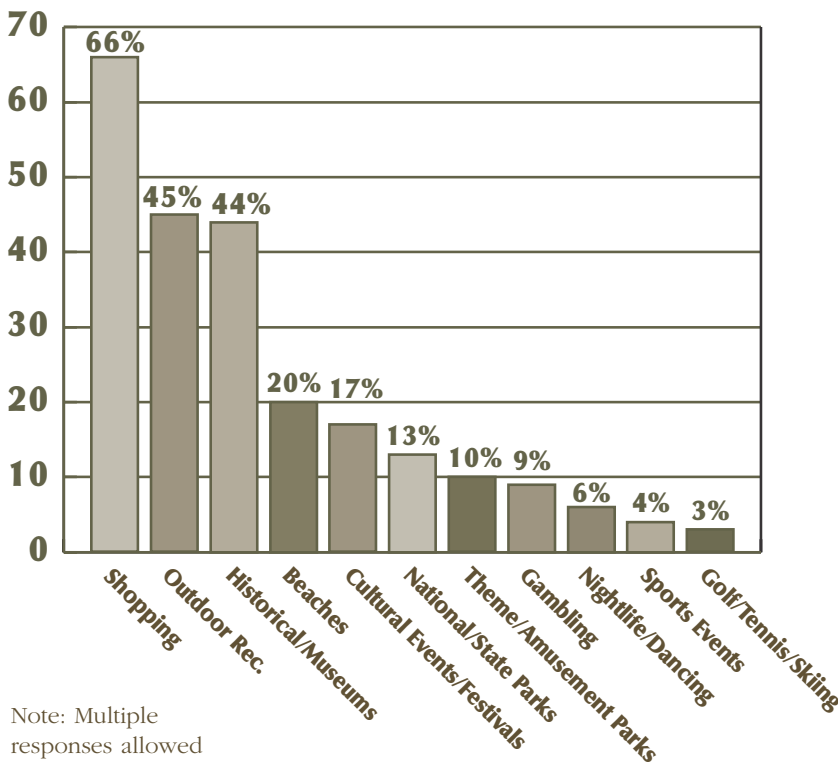
- Average age: 49
- 33 percent have children in the household
- Annual household income: \$55,600 median
- 58 percent of historic/cultural trips are taken by households with a college degree or more
- Historic/cultural traveling households are technologically savvy, most trips are generated by households that own a personal computer (81 percent)

## Planning Sources Used by Frequent Historic/Cultural Travelers



Note: Multiple responses allowed  
Source: Travel Industry Association of America's Historic/Cultural Traveler, 2003 Edition

## Activities by Historic/Cultural Travelers

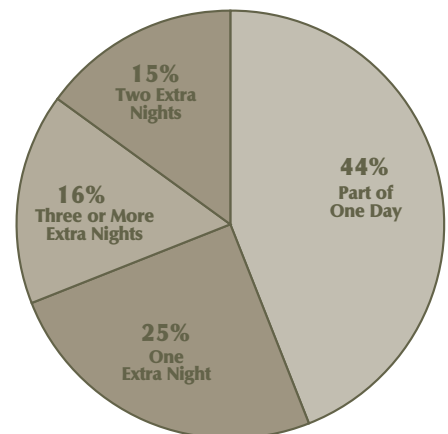


Note: Multiple responses allowed

Source: Travel Industry Association of America's Historic/Cultural Traveler, 2003 Edition

## Time Added to a Recent Trip Because of a Historic/Cultural Activity or Event

(Among 47.2 million historic/cultural travelers who added time)



Source: Travel Industry Association of America's Historic/Cultural Traveler, 2003 Edition

# State Tourism Budgets

(in millions of dollars)

State	2002-2003 projected budget	State	2002-2003 projected budget
Alabama	\$8.5	New Hampshire	\$5.9
Alaska	\$10.5	New Jersey	No data
Arizona	\$9.0	New Mexico	\$14.3
Arkansas	\$12.3	New York	No data
California	\$15.7	North Carolina	\$11.4
Colorado	\$7.7	North Dakota	\$2.5
Connecticut	No data	Ohio	No data
Delaware	\$1.6	Oklahoma	\$10.9
Florida	\$29.4	Oregon	\$3.1
Georgia	\$9.4	Pennsylvania	\$35.1
Hawaii	\$56.0	Rhode Island	\$2.5
Idaho	\$5.5	South Carolina	\$9.7
Illinois	\$49.7	<b>South Dakota</b>	<b>\$6.3*</b>
Indiana	\$5.3	Tennessee	No data
Iowa	\$3.6	Texas	\$31.1
Kansas	\$4.0	Utah	\$7.3
Kentucky	\$6.9	Vermont	\$ 5.1
Louisiana	\$17.8	Virginia	\$15.0
Maine	\$6.0	Washington	\$ 3.5
Maryland	\$13.4	West Virginia	\$17.0
Massachusetts	\$10.1	Wisconsin	\$14.8
Michigan	\$14.8	Wyoming	\$ 5.6
Minnesota	\$9.9		
Mississippi	\$9.3		
Missouri	\$15.2		
Montana	\$8.2		
Nebraska	\$3.0		
Nevada	\$10.1		

\* South Dakota's actual budget for FY03 was \$6,601,975. The estimated FY04 budget is \$7,818,473.

Source: Travel Industry Association of America's 2002-2003 Survey of U.S. State and Territory Tourism Office Budgets

## Tourism Budgets in Review

- The average projected state budget for 2002-2003 was \$12.3 million.
- Hawaii had the largest budget of \$56 million. Illinois came in next with \$49.7 million and Pennsylvania third with \$35.1 million.
- South Dakota's projected budget ranked 31st among the 45 states that provided budget figures for the survey. Four of the states not reporting (Connecticut, New York, New Jersey and Tennessee) typically have larger budgets than South Dakota's.
- South Dakota's neighboring states ranked as follows: Minnesota 21st, Montana 27th, Wyoming 34th, Iowa 39th, Nebraska 42nd and North Dakota 43rd.

Source: Travel Industry Association of America's 2002-2003 Survey of U.S. State and Territory Tourism Office Budgets

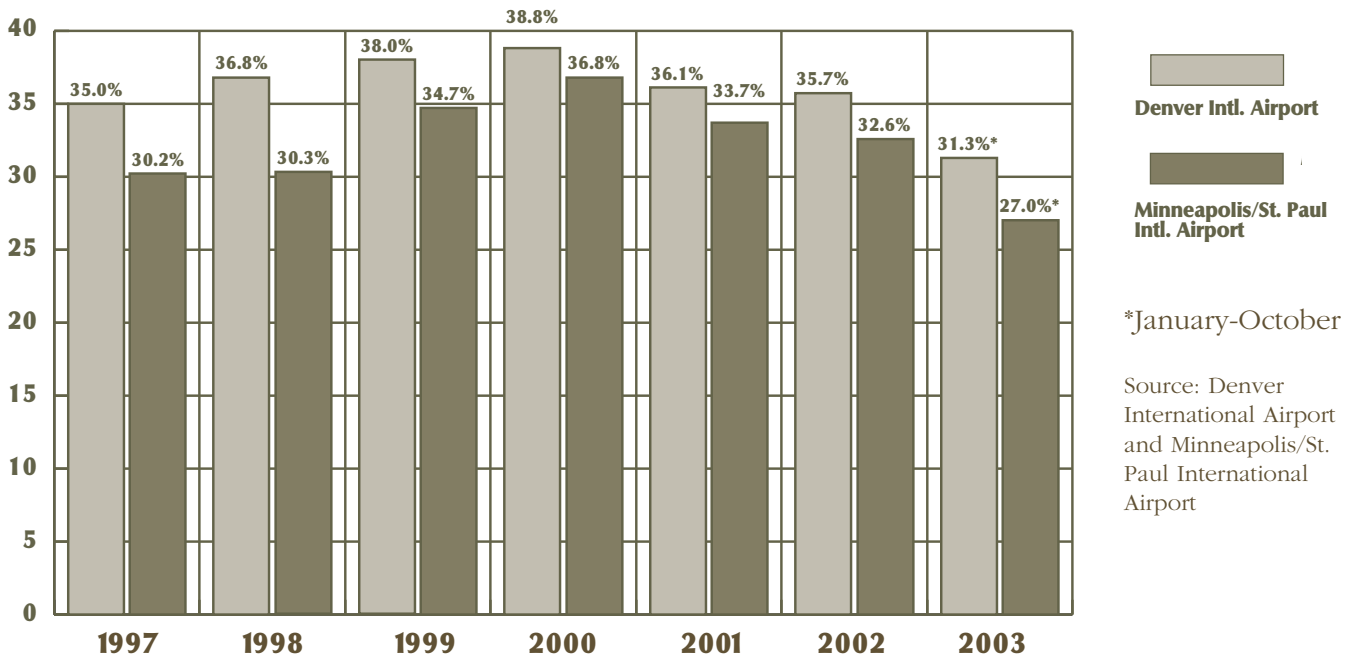
# Regional Roundup

## Occupancy Rates around the Region (January-November)

	2002	2003	change		2002	2003	change
Colorado	57.1%	55.9%	-2.1%	Nebraska	56.1%	55.2%	-1.6%
Iowa	57.6%	56.6%	-1.7%	North Dakota	57.7%	59.5%	+3.1%
Michigan	55.4%	53.5%	-3.4%	<b>South Dakota</b>	<b>56.4%</b>	<b>56.1%</b>	<b>-0.5%</b>
Minnesota	59.2%	58.9%	-0.5%	Wisconsin	54.4%	55.1%	+1.3%
Montana	59.5%	58.5%	-1.7%	Wyoming	60.4%	60.3%	-0.2%

Source: Smith Travel Research's Lodging Review Outlook, December 2003

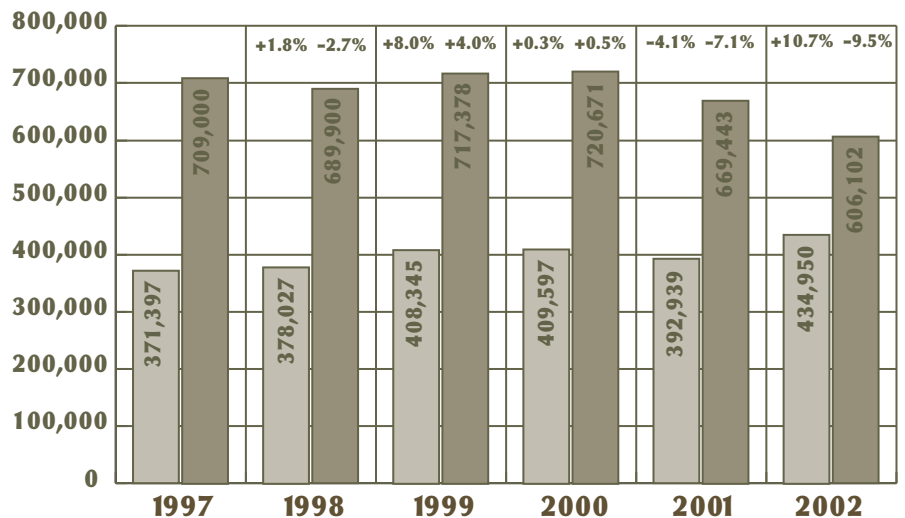
## Passenger Volume at Gateway Airports (in millions)



## Passenger Volume Rapid City and Sioux Falls Regional Airports



Source: Rapid City Regional Airport and Sioux Falls Regional Airport



## 2003 Visitation at National Parks\*

	2002	2003	% Change
<b>Badlands National Park, South Dakota</b>	<b>927,762</b>	<b>889,898</b>	<b>-4.1%</b>
Devils Tower National Monument, Wyoming	405,384	296,266	-2.2%
Effigy Mounds National Monument, Iowa	76,260	80,859	+6%
Glacier National Park, Montana**	1,885,125	1,937,240	+2.8%
Grand Teton National Park, Wyoming	3,987,585	4,065,184	+1.9%
<b>Mount Rushmore National Memorial, South Dakota</b>	<b>2,922,003</b>	<b>2,998,105</b>	<b>+2.6%</b>
Pipestone National Monument, Minnesota	84,295	82,288	-2.4%
Scotts Bluff National Monument, Nebraska	111,293	105,610	-5.1%
Theodore Roosevelt National Park, North Dakota	478,130	496,872	+3.9%
Yellowstone National Park, Wyoming	3,935,045	3,959,212	+0.6%

\* Total of recreational and non-recreational visits

\*\* Visitation for Glacier National Park represent January-October numbers

Source: National Park Service Public Use Statistics Office

## State Statistics

See how South Dakota's visitor industry fared in 2003. This section contains statistics on visitor spending, occupancy and visitation across the land of Great Faces and Great Places.

### 2003 Economic Impact

Visitor spending totaled \$698 million in 2003, \$35 million more than 2002, marking the highest level of visitor spending ever achieved in South Dakota. Visitor spending in 2003 is estimated to be 5.3 percent higher than the previous high recorded in 2002. The economic performance attained in 2003 is consistent with the long-run trend beginning in 1991.

From a statewide perspective, the July through October portion of the visitor season experienced the strongest relative performance with May and June showing the weakest performance.

Positive growth rates occurred in Black Hills counties and a significant number of Glacial Lakes and Prairies region counties. Again this year, the weakest visitor spending levels were associated with counties along the Missouri River. Brown County had the highest growth in visitor spending among South Dakota's more populated counties.

As for the state's four regions, Glacial Lakes and Prairies experienced the largest increase in visitor spending, 8.6 percent. 2003 represents the highest annual growth for northeastern South Dakota since 1997. Spending in both the Black Hills, Badlands and Lakes and Southeast regions rose by 5.6 and 5.3 percent respectively. Visitor spending in the Great Lakes Region for 2003 was virtually the same as 2002. Several counties, dependent on Missouri River reservoir conditions, experienced negative visitor volume in 2003. These counties include Charles Mix, Stanley and Sully. Other counties in the region, such as Corson, Hyde, Tripp and Walworth, experienced significant growth.

In the long-term, annual increases in South Dakota's real spending growth (a figure that factors out inflation) have averaged 3.9 percent since 1988. In 2003, however, the state experienced a 3.2 percent increase in real growth bringing the average to 3.7 percent.

Travelers yielded an estimated \$42.7 million in gas and sales tax receipts for 2003, about \$2.2 million more than in 2002. The visitor industry also accounted for an estimated 31,828 jobs across South Dakota.

\*Unless otherwise noted, statistics included in this section are provided by Dr. Michael K. Madden. For an explanation of the methodology used in computing travel industry estimates, see Appendix A on page 99.

## Travel Regions Used in Study\*



**Region 1 = Southeast**

**Region 2 = Glacial Lakes and Prairies**

**Region 3 = Great Lakes**

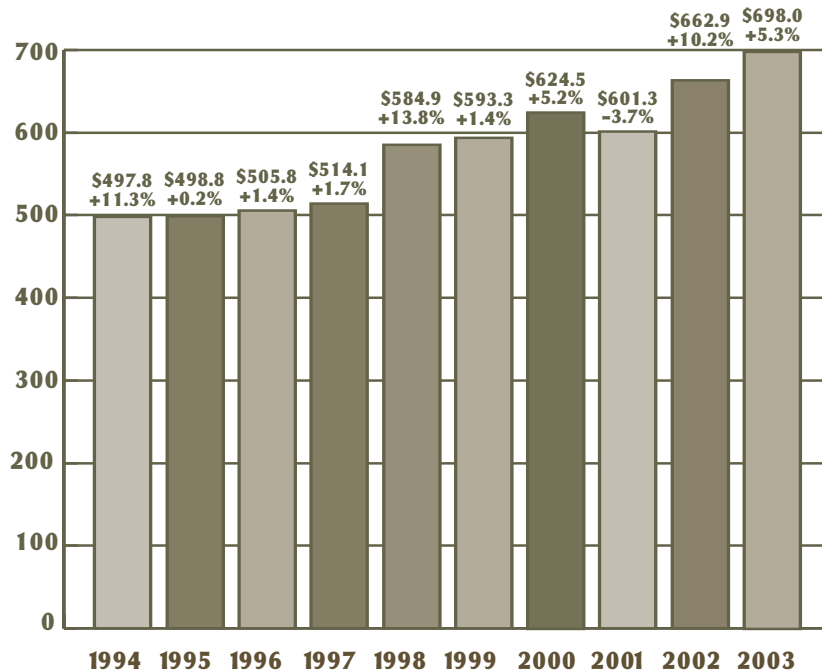
**Region 4 = Black Hills, Badlands and Lakes**

\*In 2003, regional boundaries for the economic impact and occupancy studies were revised to mimic the boundaries followed by the regional tourism associations. Data in the following charts and graphs has been adjusted for the regional comparisons from 1996.

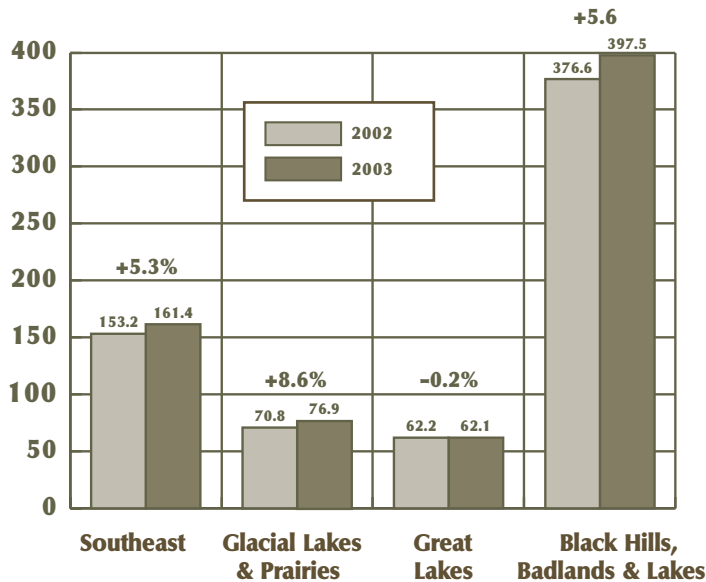
## Facts at a Glance 2003

		% Change from 2002
Total visitor spending:	\$697,971,635	.(+5.3 percent)
Impact on state's economy:	\$1.75 billion	.(+5.3 percent)
State sales tax from visitor spending:	\$20,465,000	.(+3.9 percent)
State gasoline tax from visitor spending:	\$22,246,000	.(+6.9 percent)
Employment traceable to visitor industry:	31,828 jobs	.(+2.6 percent)

## Total Visitor Expenditures and Percent Change 1994-2003 (in millions)



## Visitor Expenditures by Region 2002-2003 (in millions)



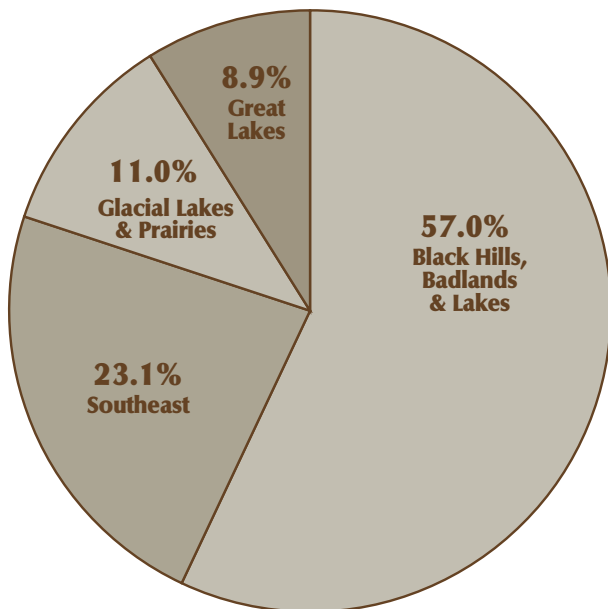
## Percentage Change in Real Growth (Visitor Sales Volume) 1989-2003

(Percentages factor out the impact of inflation on actual expenditure levels.)

1989	+7.2%
1990	+9.1%
1991	+5.5%
1992	-0.1%
1993	+11.3%
1994	+8.2%
1995	-2.6%
1996	-1.4%
1997	-0.6%
1998	+12.1%
1999	-0.7%
2000	+2.7%
2001	-6.4%
2002	+8.4%
2003	+3.2%

Arithmetic Average 3.7%

## 2003 Visitor Expenditures by Regional Share



## Visitor Expenditures by Region 1996-2003 (in millions)

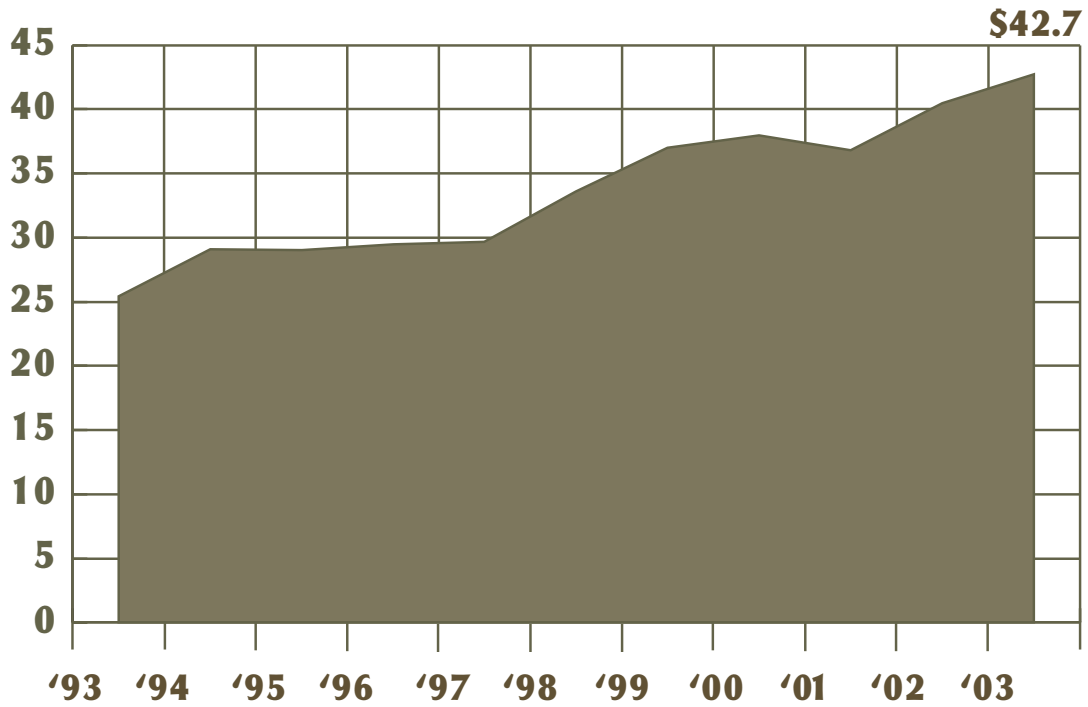
	South-east	Glacial Lakes & Prairies	Great Lakes	Black Hills, Badlands & Lakes
1996	\$118.7	\$57.3	\$53.9	\$275.9
1997	\$123.4	\$62.2	\$56.1	\$272.3
1998	\$144.0	\$67.3	\$58.7	\$314.9
1999	\$143.2	\$66.5	\$57.6	\$326.1
2000	\$145.5	\$68.7	\$58.6	\$351.7
2001	\$146.3	\$67.3	\$61.1	\$326.5
2002	\$153.2	\$70.8	\$62.2	\$376.6
2003	\$161.4	\$76.9	\$62.1	\$397.5

## Estimated Total Visitor Sales - Volume by County and Percent Change

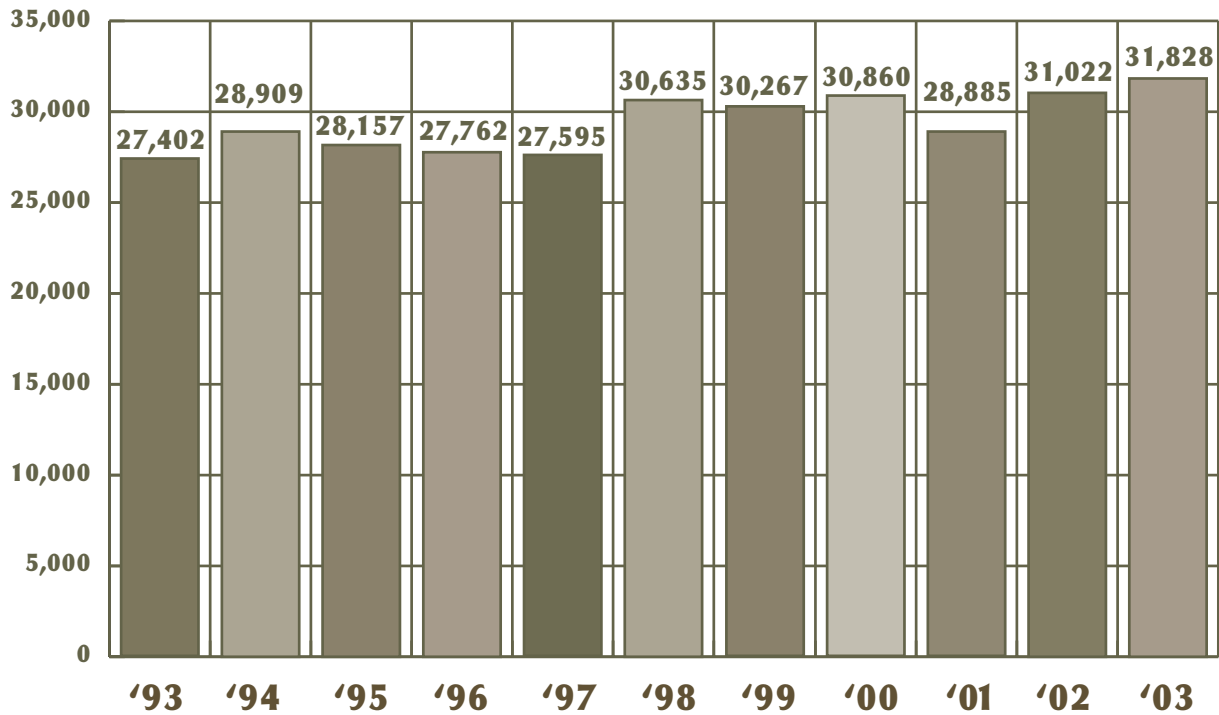
County	2002	2003	Change	County	2002	2003	Change
Aurora	1,311,739	1,238,749	-5.6%	Jackson	6,955,203	7,720,572	+11.0%
Beadle	6,330,255	6,391,729	+1.0%	Jerauld	684,093	1,706,778	+149.5%
Bennett	1,116,823	915,770	-18.0%	Jones	5,704,126	5,269,183	-7.6%
Bon Homme	1,241,150	1,113,065	-10.3%	Kingsbury	2,267,876	2,854,279	+25.9%
Brookings	9,394,686	10,488,644	+11.6%	Lake	2,307,850	3,424,542	+48.4%
Brown	12,831,776	15,322,655	+19.4%	Lawrence	84,380,116	89,579,643	+6.2%
Brule	9,279,991	9,387,018	+1.2%	Lincoln	6,096,078	5,967,165	-2.1%
Buffalo	NA *	NA *	NA *	Lyman	10,520,994	10,615,462	+0.9%
Butte	5,568,092	5,667,450	+1.8%	McCook	1,557,325	1,630,289	+4.7%
Campbell	1,025,122	1,032,545	+0.7%	McPherson	790,877	768,233	-2.9%
Charles Mix	7,155,043	5,951,158	-16.8%	Marshall	1,610,827	1,820,196	+13.0%
Clark	672,251	680,580	+1.2%	Meade	32,813,412	38,275,561	+16.6%
Clay	7,051,546	7,311,751	+3.7%	Mellette	627,066	379,404	-39.5%
Codington	14,070,790	14,704,118	+4.5%	Miner	498,984	686,999	+37.7%
Corson	519,112	655,763	+26.3%	Minnehaha	88,842,168	92,940,303	+4.6%
Custer	43,343,345	45,134,744	+4.1%	Moody	6,108,134	6,303,594	+3.2%
Davison	25,027,050	25,404,403	+1.5%	Pennington	177,356,673	184,548,939	+4.1%
Day	2,819,588	2,644,480	-6.2%	Perkins	1,016,969	901,603	-11.3%
Deuel	1,029,959	1,055,326	+2.5%	Potter	2,781,094	2,971,591	+6.8%
Dewey	952,749	872,823	-8.4%	Roberts	2,892,099	2,899,159	+0.2%
Douglas	393,583	486,431	+23.6%	Sanborn	707,885	669,829	-5.4%
Edmunds	700,244	706,686	+0.9%	Shannon	497,445	789,924	+58.8%
Fall River	10,302,614	10,566,917	+2.6%	Spink	2,196,163	2,248,024	+2.4%
Faulk	622,511	678,230	+9.0%	Stanley	2,207,621	2,152,248	-2.5%
Grant	2,727,347	1,999,881	-26.7%	Sully	2,238,514	2,182,459	-2.5%
Gregory	1,621,256	1,680,178	+3.6%	Tripp	5,338,289	6,139,657	+15.0%
Haakon	767,005	720,130	-6.1%	Todd	3,920,022	4,013,546	+2.4%
Hamlin	811,482	1,220,931	+50.5%	Turner	1,115,094	1,305,170	+17.0%
Hand	1,789,758	1,749,594	-2.2%	Union	5,720,285	6,264,376	+9.5%
Hanson	528,731	602,799	+14.0%	Walworth	4,096,502	4,583,937	+11.9%
Harding	712,782	753,436	+5.7%	Yankton	11,665,870	12,465,498	+6.9%
Hughes	13,795,291	14,400,302	+4.4%	Ziebach	99,341	169,816	+70.9%
Hutchinson	1,416,694	1,807,815	+27.6%				
Hyde	315,572	377,553	+19.6%				

\* Not available: Taxable sales not available for lodging, eating and drinking establishments for Buffalo County 2002-2003.

## State Fiscal Impacts (gas and sales tax) (in millions)



## South Dakota Employment Traceable to Visitor Industry



## 2003 Hotel/Motel and Campground Occupancy

Statewide hotel/motel occupancy for May through October 2003 was 64.8 percent, moderately lower than 2002 occupancy levels but somewhat stronger than levels experienced in 2001 and 2000. The May occupancy rate was significantly lower than May 2002. However, October occupancy was somewhat improved over the same month in 2002. Statewide, the number of room nights rented in 2003 was 2,764,632, a 1.9 percent decrease from 2002.

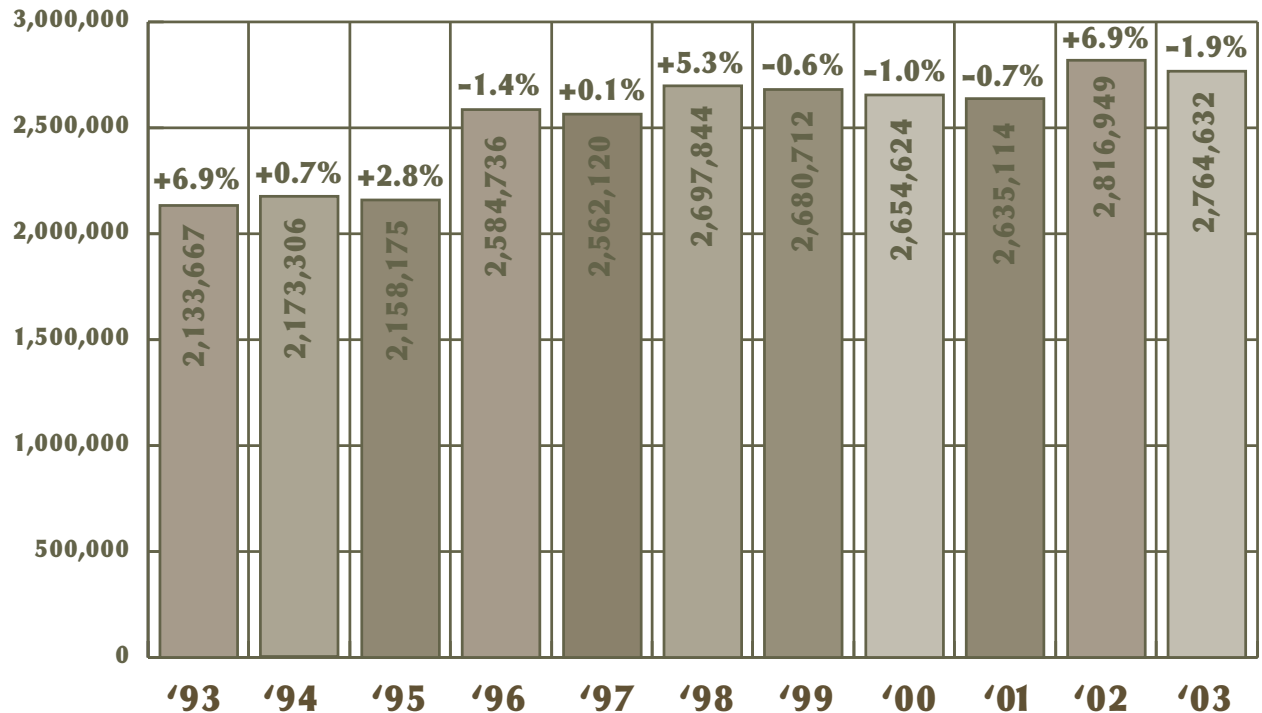
Region 4, Black Hills, Badlands and Lakes, saw an occupancy rate unchanged from last year, 68.3 percent. The highest seasonal occupancy rate in that region occurred in July. The Great Lakes region recorded monthly reductions in occupancy May through October. This is probably due to reduced water levels and associated drops in recreational opportunities on Lake Oahe and Lake Sharpe.

An additional 405 lodging units were available statewide in 2003, accounting for a 1.8 percent increase over 2002. The Black Hills, Badlands and Lakes region led the way with an increase of 246 rooms. The number of rooms available in 2003 is 10.7 percent higher than five years ago.

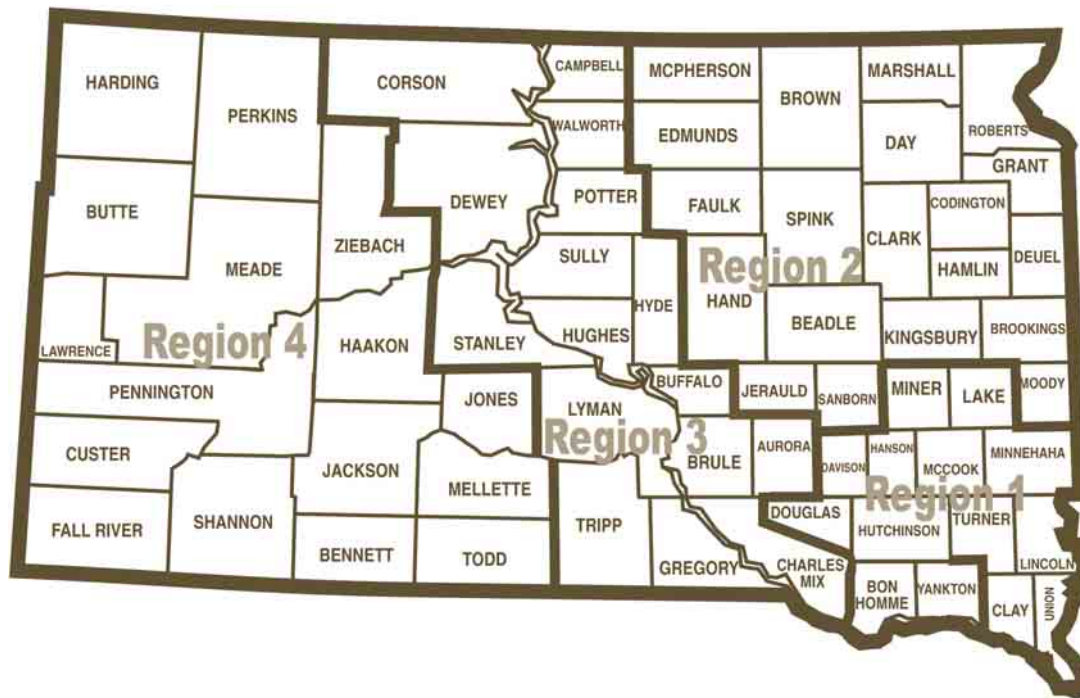
Campground occupancy in 2003 was comparable to 2002 levels in the state equating to 57 percent occupancy. Statewide, July recorded the highest campground occupancy rate in 2003. The Black Hills, Badlands and Lakes region experienced an improvement while the three remaining regions were comparable to slightly lower when compared to 2002.

\*Unless otherwise noted, statistics included in this section are provided by Dr. Michael K. Madden. For an explanation of the methodology used in figuring occupancy rates, see Appendix B on page 99.

## South Dakota Room Nights Rented (May through October)



## Map of Occupancy Regions\*



- Region 1 = Southeast**
- Region 2 = Glacial Lakes and Prairies**
- Region 3 = Great Lakes**
- Region 4 = Black Hills, Badlands and Lakes**

\*In 2003, regional boundaries for the economic impact and occupancy studies were revised to mimic the boundaries followed by the regional tourism associations. Data in the following charts and graphs has been adjusted for the regional comparisons from 1996.

## Lodging Units by Region, 1998-2003\*

Region	1998	1999	2000	2001	2002	2003	Change 2002-2003	Change 1998-2003
<b>1 Southeast</b>	5,560	5,917	5,995	6,281	6,202	6,244	+42	+684
<b>2 Glacial Lakes and Prairies</b>	2,955	2,857	3,087	3,082	3,145	3,130	-15	+175
<b>3 Great Lakes</b>	2,668	2,588	2,649	2,635	2,767	2,899	+132	+231
<b>4 Black Hills, Badlands and Lakes</b>	9,763	9,814	10,195	10,240	10,668	10,914	+246	+1,151
<b>Total</b>	20,946	21,176	21,926	22,238	22,782	23,187	+405	+2,241

\* Room count data is based on South Dakota Department of Health records as of October of each year.

## Season-end Motel Occupancy (May through October)

Region	1998 %	1999 %	2000 %	2001 %	2002 %	2003 %
1 Southeast	70.6	71.9	69.8	70.5	71.5	68.2
2 Glacial Lakes and Prairies	66.9	61.2	60.3	58.7	59.6	55.6
3 Great Lakes	66.7	65.6	62.6	62.2	61.4	54.3
4 Black Hills, Badlands and Lakes	71.5	69.6	66.5	63.5	68.3	68.3
Statewide	70.0	68.4	65.8	64.4	67.2	64.8

## Season-end Campground Occupancy \* (June through August)

Region	1998 %	1999 %	2000 %	2001 %	2002 %	2003 %
1 Southeast	45.1	47.4	48.7	52.5	47.2	46.9
2 Glacial Lakes and Prairies	34.9	42.2	42.5	49.8	52.2	49.4
3 Great Lakes	55.0	47.1	50.6	51.1	51.3	47.0
4 Black Hills, Badlands and Lakes	57.5	59.8	60.7	54.7	61.5	62.4
Statewide	54.4	54.6	56.1	52.7	56.6	57.0

\*Sample includes both public and private campgrounds.

## International Occupancy

For more than a decade, the South Dakota Office of Tourism has made efforts to market the state to international travelers. Because of this activity, the office has conducted research since 1995 that tracks international travel. In the first years, the survey concentrated solely on the Black Hills, Badlands and Lakes region. In 2000, the survey sample was expanded to include the Southeast Region. In 2001, the survey also included the Glacial Lakes and Prairies region. These same three regions of the state were used in the 2002 survey. In 2003, the survey was further expanded to all four tourism regions in the state.

The 2003 survey results reflect much of what has been discovered in previous years. According to survey results, the weighted state average for international travel in 2003 was 1.7 percent. As in previous years, the Black Hills, Badlands and Lakes region experienced a higher international influence than other regions in the state. For the entire sample period, the Black Hills, Badlands and Lakes region is estimated to have received an international impact of about 2.4 percent on aver-

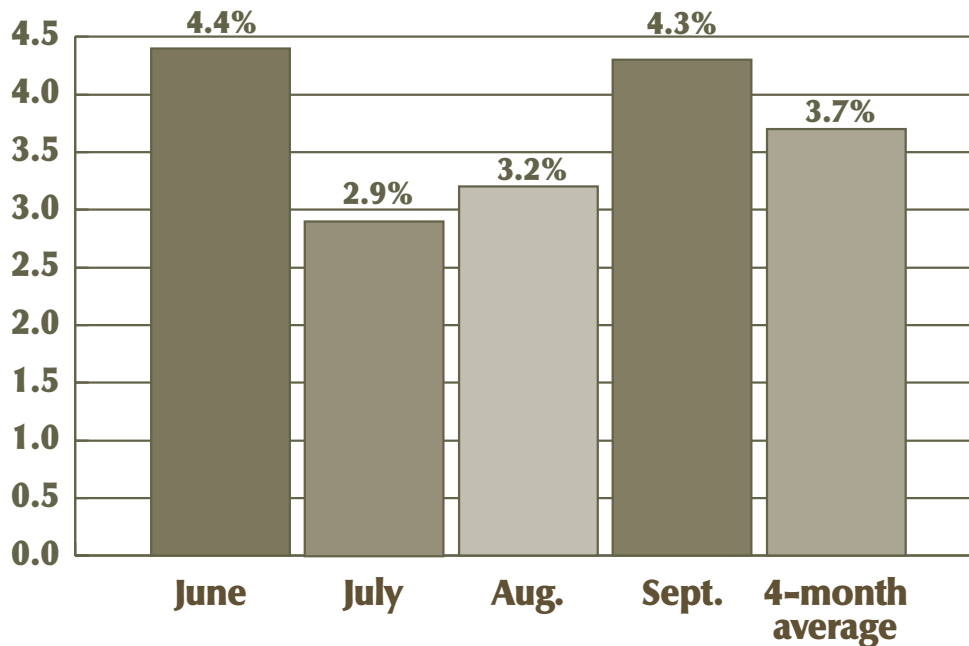
age in 2003. The Southeast Region averaged about 1.2 percent for the combined months of June and July. International travel generally accounted for only about 0.7 and 0.6 percent of travel in the Glacial Lakes and Prairies, and Great Lakes regions respectively.

Using surveys from previous years, it appears that the relative shoulder travel months of June and September are characterized by higher percentages of foreign guests than the traditional peak travel months of July and August. This largely continued to be the case in 2003 in the Black Hills, Badlands and Lakes region.

Germany remained the top-generating country in 2003, followed by the United Kingdom. Other top countries of origin for 2003 included Japan, the Netherlands, Italy, France and Norway.

The Office of Tourism targets travelers from Germany, France, Belgium, Italy and the United Kingdom with its international promotions. This is done as part of a consortium, Rocky Mountain International, with Montana, Wyoming and Idaho.

## Percentage of Lodging Guests of Foreign Origin 1996-2003 average for Black Hills, Badlands and Lakes



## Percentage of Rented Rooms Occupied by International Visitors, 2003

Region	Overall Avg.	June Avg.	July Avg.	June Max.	July Max.
1 South-east	1.2%	1.1%	1.3%	2.1%	1.7%
2 Glacial Lakes & Prairies	0.7%	0.4%	1.1%	0.6%	1.9%
3 Great Lakes	0.6%	0.4%	0.9%	1.2%	2.1%
4 Black Hills, Badlands & Lakes	2.4%	2.7%	2.2%	4.2%	2.8%
Weighted State Average	1.7%	1.7%	1.6%	2.8%	2.3%

## Top Countries of Origin of Foreign Visitors (2003)

1. Germany
2. United Kingdom
3. Japan
4. Netherlands
5. Italy

## Top 20 States Represented at Interstate Information Centers 2003

- |                  |                  |
|------------------|------------------|
| 1. Minnesota     | 14. Ohio         |
| 2. South Dakota  | 15. Florida      |
| 3. Iowa          | 16. Texas        |
| 4. Wisconsin     | 17. Colorado     |
| 5. Illinois      | 18. Pennsylvania |
| 6. Nebraska      | 19. Montana      |
| 7. Michigan      | 20. Kansas       |
| 8. Missouri      |                  |
| 9. Washington    |                  |
| 10. Wyoming      |                  |
| 11. North Dakota |                  |
| 12. California   |                  |
| 13. Indiana      |                  |

Source: Guest registers at South Dakota Interstate Information Centers (May-October).

# Visitation at Major South Dakota Attractions

## Mount Rushmore National Memorial

1993	2,604,692
1994	2,755,394
1995	2,700,721
1996	2,571,209
1997	2,365,008
1998	2,706,926
1999	2,656,278
2000	2,522,288
2001	2,570,271
2002	2,922,002
2003	2,998,015

## Wind Cave National Park

1993	740,807
1994	1,180,024
1995	1,069,197
1996	1,059,070
1997	1,130,695
1998	1,158,001
1999	1,016,065
2000	872,194
2001	874,026
2002	965,416
2003	1,201,527

## Corn Palace\*

1993	561,149
1994	587,822
1995	535,861
1996	500,372
1997	287,358
1998	334,452
1999	330,894
2000	300,851
2001	267,094
2002	294,922
2003	276,235

## Fort Sisseton State Park

1993	69,619
1994	78,407
1995	79,364
1996	72,753
1997	78,852
1998	96,992
1999	98,976
2000	107,799
2001	111,219
2002	107,862
2003	120,009

## Badlands National Park

1993	1,198,322
1994	1,149,323
1995	1,094,433
1996	1,043,407
1997	989,560
1998	1,039,913
1999	969,317
2000	1,124,688
2001	974,333
2002	927,762
2003	889,898

## Black Hills National Forest\*

Motorized Travel	
2001	1,938,800
2002	2,083,100
Camping	
2001	230,100
2002	235,800

\* One visitor day is one person for 12 hours or 12 people for one hour in the Forest

## Jewel Cave National Monument

1993	132,611
1994	148,552
1995	154,758
1996	144,983
1997	133,393
1998	131,238
1999	135,253
2000	129,445
2001	125,678
2002	131,565
2003	126,735

## Cultural Heritage Center

1993	37,119
1994	30,995
1995	23,614
1996	22,513
1997	20,653
1998	21,829
1999	22,262
2000	20,733
2001	22,984
2002	19,741
2003	20,979

## Custer State Park

1993	1,495,355
1994	1,651,115
1995	1,700,217
1996	1,678,808
1997	1,703,819
1998	1,828,623
1999	1,801,494
2000	1,693,887
2001	1,666,938
2002	1,820,154
2003	1,821,078

## Lewis and Clark Recreation Area

1993	844,251
1994	1,043,451
1995	1,102,499
1996	1,122,924
1997	1,037,169
1998	1,013,286
1999	1,013,070
2000	1,028,697
2001	1,071,621
2002	1,070,190
2003	1,105,725

## The Mammoth Site

1993	88,527
1994	98,837
1995	103,096
1996	92,926
1997	90,391
1998	97,104
1999	99,878
2000	105,706
2001	96,160
2002	107,102
2003	102,003

## West Whitlock Recreation Area

1993	62,727
1994	74,589
1995	76,440
1996	86,658
1997	97,479
1998	69,771
1999	40,497
2000	64,047
2001	69,745
2002	70,640
2003	72,153

## Washington Pavilion of Arts and Science

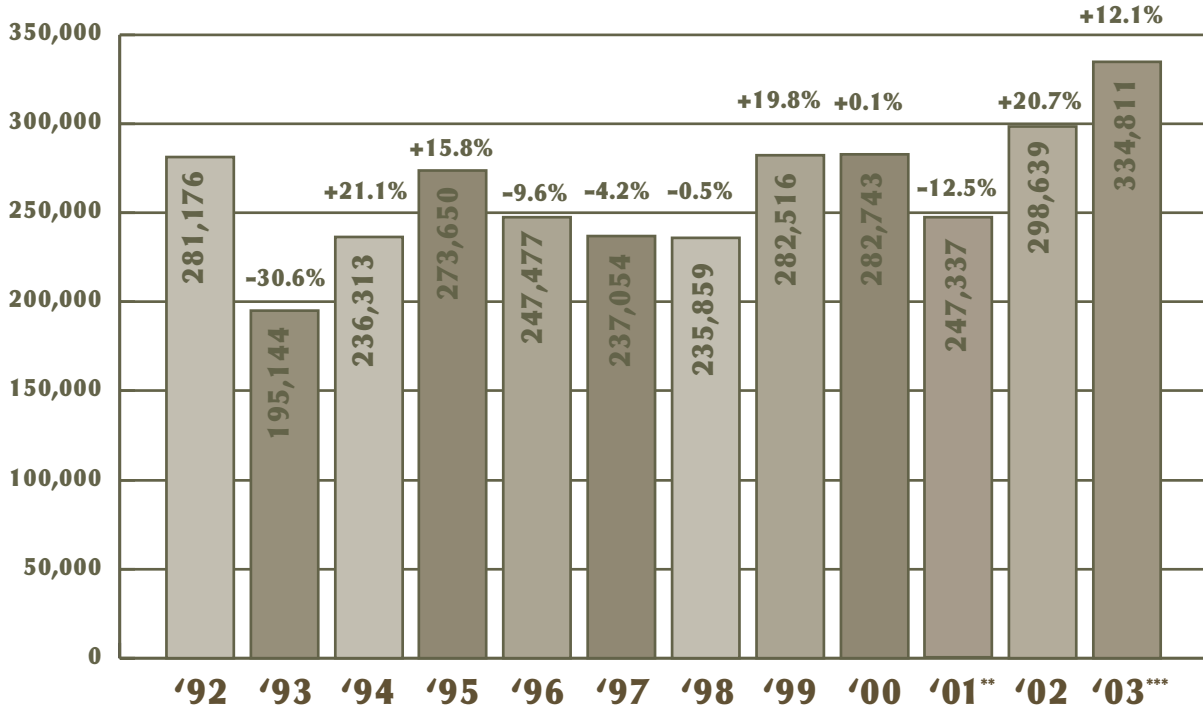
2000	358,746
2001	293,290
2002	304,567
2003	306,826

## Redlin Art Center

2000	234,648
2001	231,304
2002	195,552
2003	182,194

\*Corn Palace figures are for Memorial Day-Labor Day only. Changed counting method in 1997

## Visitation at Interstate Information Centers\*



Source: Guest Registers at South Dakota Interstate Information Centers.

The average number of people per party at the Information Centers was 2.46 in 2003. For the season (mid-May through October), more than 823,000 people passed through the Interstate Information Centers' doors.

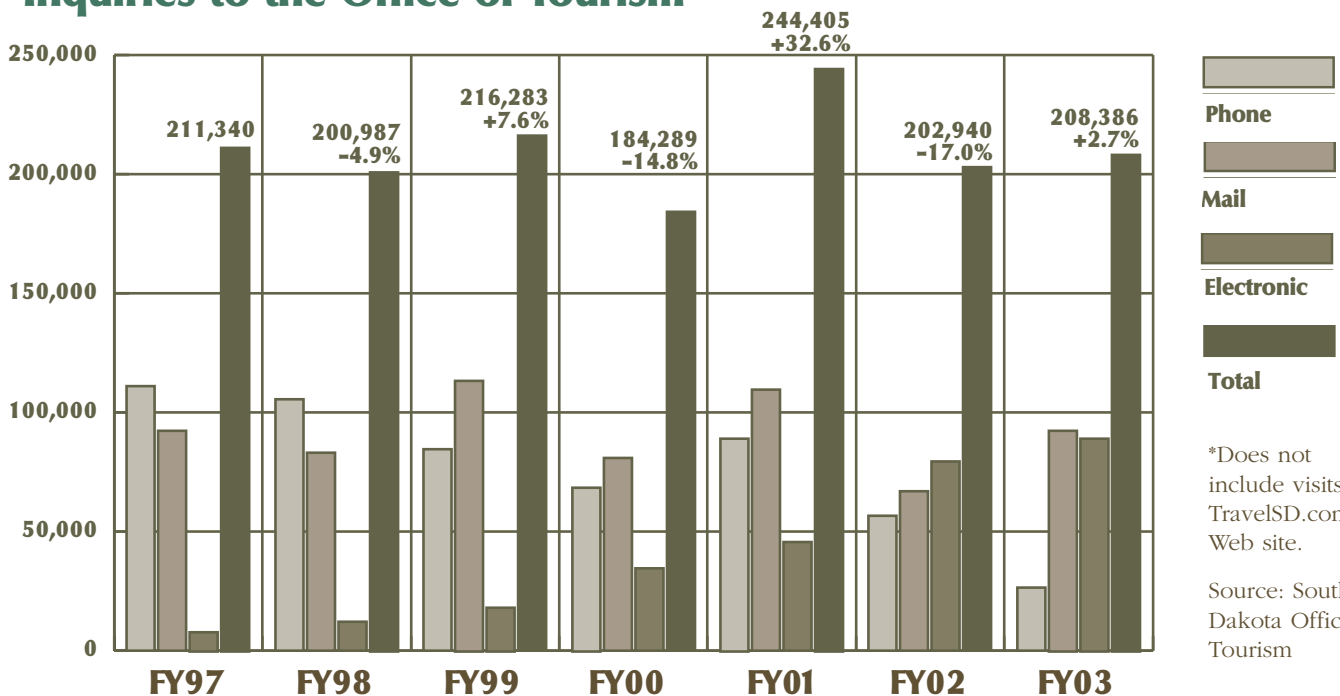
Source: South Dakota Office of Tourism

\*Figures represent cars counted at 13 Interstate Information Centers during the summer travel season, generally mid-May through September.

\*\* Vivian Information Center was closed in 2001, which accounted for 23,900 cars in 2000.

\*\*\* 2003 figure represents a one to three week extended season at four of the centers.

## Inquiries to the Office of Tourism\*

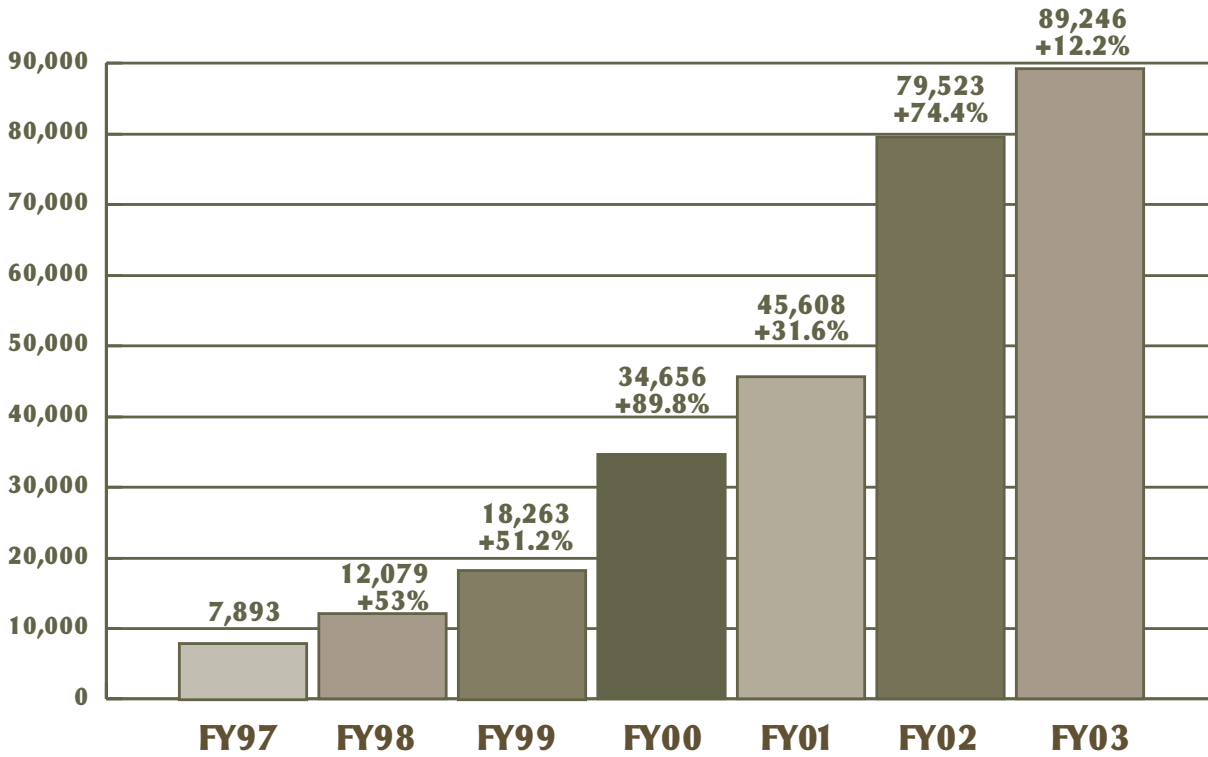


\*Does not include visits to TravelSD.com Web site.

Source: South Dakota Office of Tourism

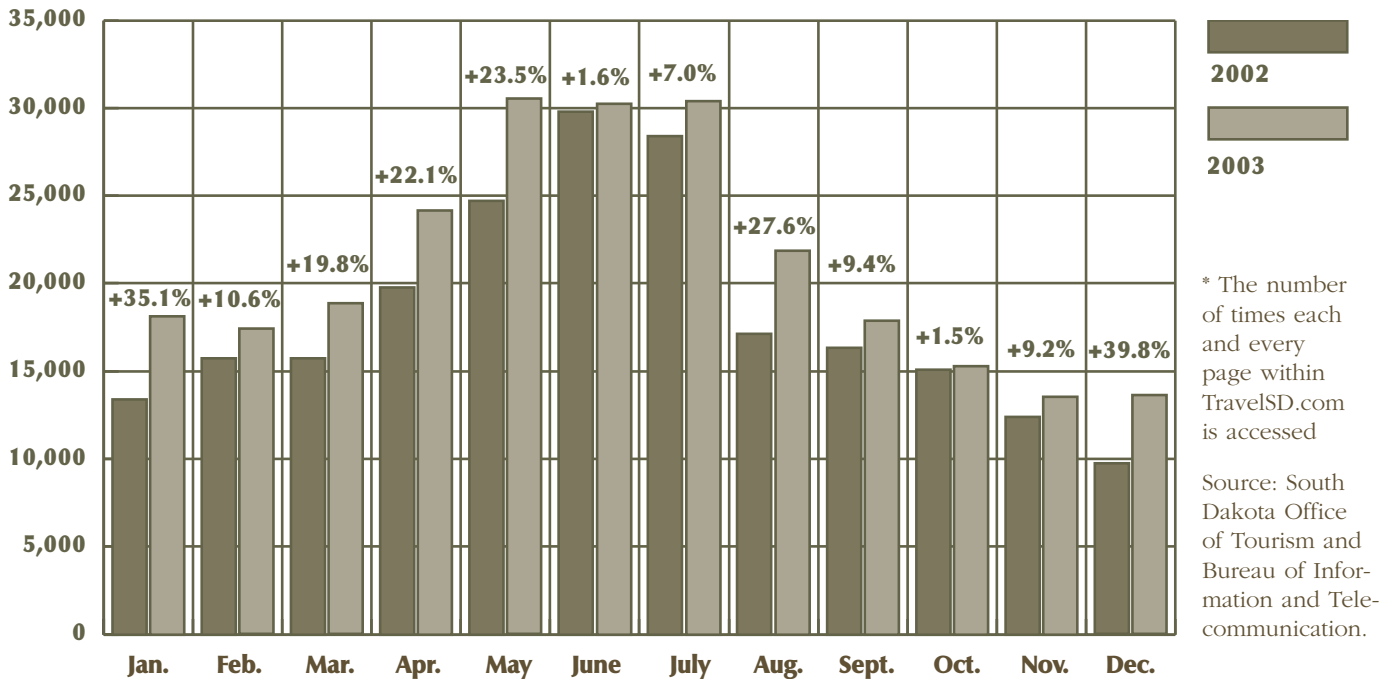
# Web Statistics

## Electronic Inquiries to the Office of Tourism\*

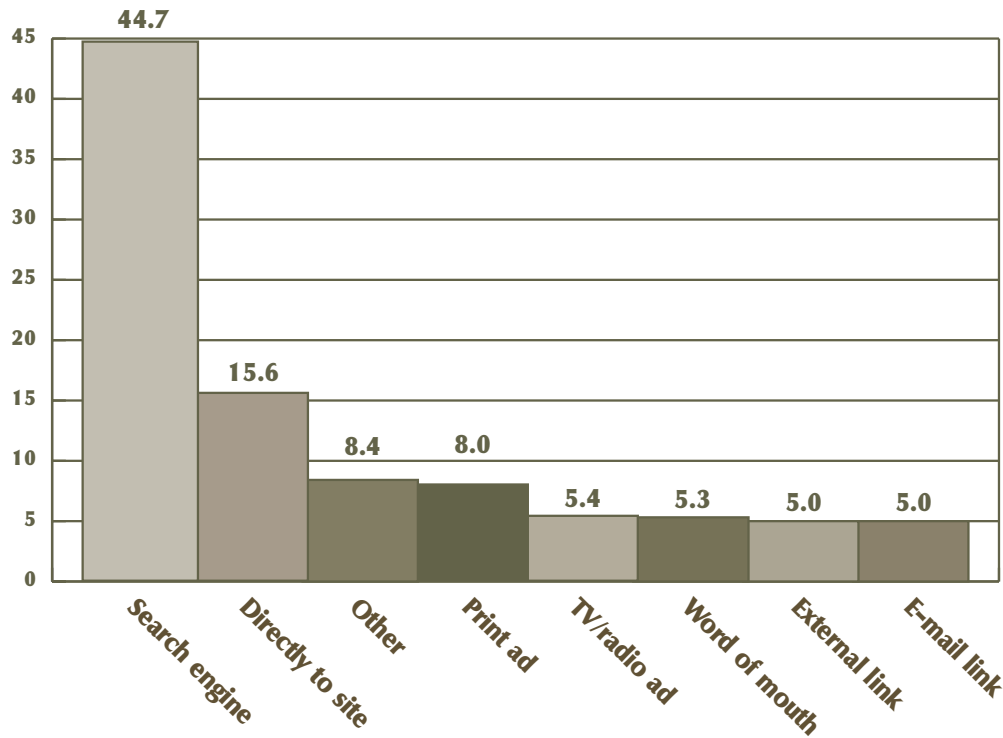


\*Does not include visits to TravelSD.com Web site. Source: South Dakota Office of Tourism

## TravelSD.com Daily Average Page Views\*

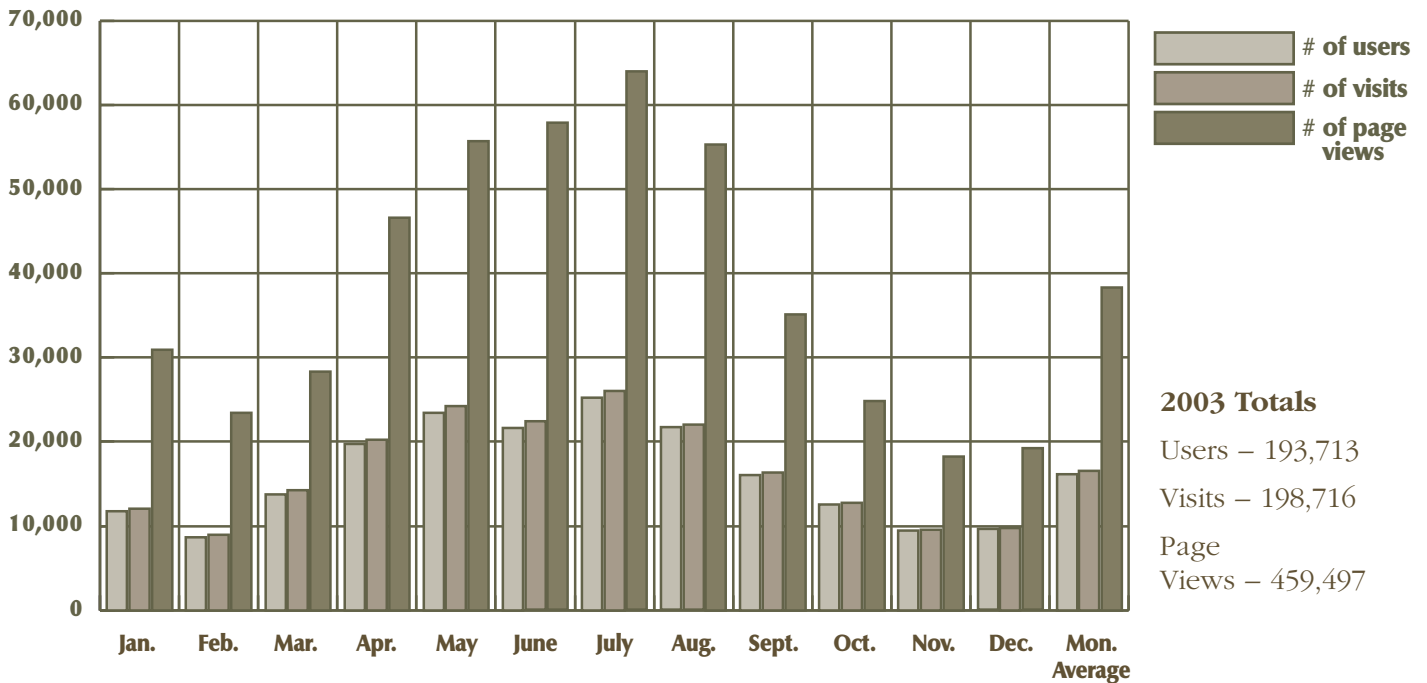


## How Users Get to TravelSD.com



Source: Office of Tourism, World Wide Web User Survey, October 2002-September 2003

## 2003 Online Vacation Package and Coupon Promotion



### Key

User – the number of users  
 Visit – the number of times the site is accessed

Page view – the number of times each and every page within TravelSD.com is accessed.

## 2003 Intercept Study

From May 22 to Aug. 11, 2003 the Office of Tourism surveyed a total of 880 travelers at nine different locations in South Dakota. The study includes 441 interviews with travelers residing within the Office of Tourism's target markets (Colorado, Illinois, Iowa, Minnesota, Missouri, Nebraska, North Dakota, Texas and Wisconsin) and 439 interviews with travelers residing outside the target markets. South Dakotans were not interviewed. Travelers were interviewed at random. Comparisons were made to the same study conducted in 1999. The complete 2003 Intercept Study is available at [SDVisit.com](http://SDVisit.com)

## Profile of In-Target Traveler, 2003 Intercept

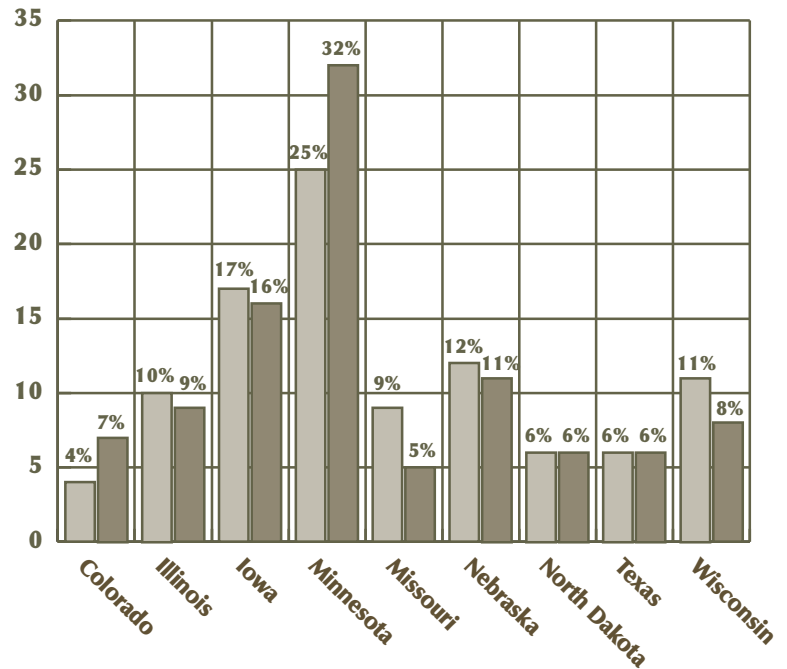
- 3.4 people in travel party
- Average age of adult travelers was 46.6
- Took a 6.3 day vacation
- 85.5 percent had been to South Dakota before
- More than two-thirds (68.3 percent) had seen South Dakota advertising, 55.1 percent said the ads influenced their decision to come to South Dakota
- Spent \$164.44 per day on entire vacation
- 76.9 percent said South Dakota was their destination

## Profile of In-Target Traveler, 1999 Intercept

- 3.2 people in travel party
- Average age of adult traveler was 40.1
- Took an 8.3 day vacation
- Spent an average of 3.9 days in South Dakota
- 83.8 percent had been to South Dakota
- Spent an average of 4 days in South Dakota
- More than half (61.5 percent) had seen South Dakota advertising, 15 percent said the ads influenced their decision to come to South Dakota
- Spent \$141.54 per day on entire vacation
- 55.1 percent said South Dakota was their destination

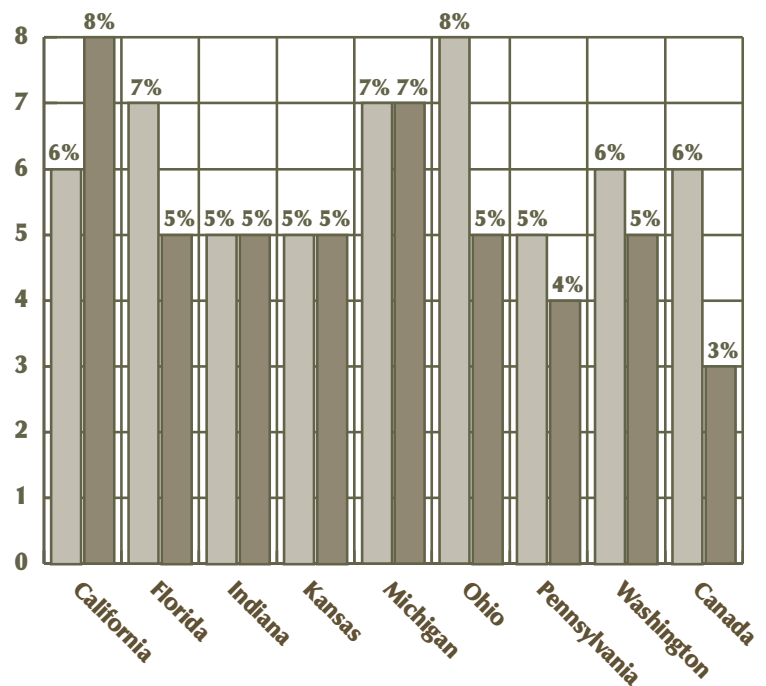
## Origin of Travelers

### In-Target\*



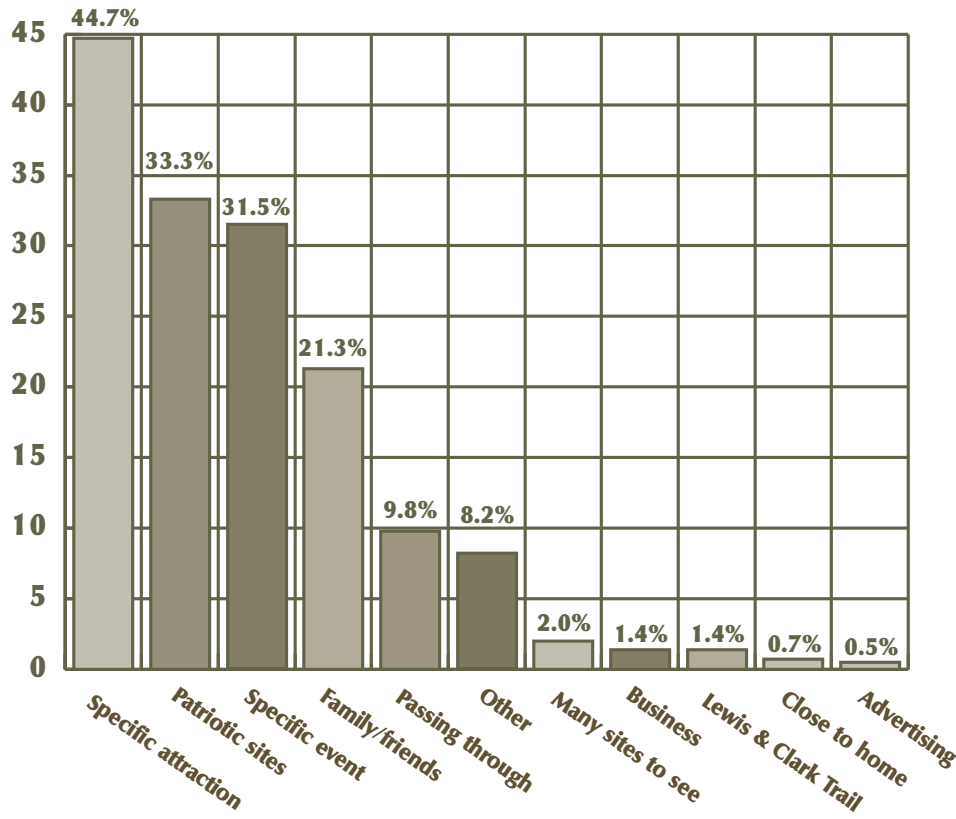
\*Travelers residing within Tourism's target markets.

### Out-of-Target\*



\* Travelers residing outside Tourism's target markets.

# Factors Influencing 2003 Travel to South Dakota\*

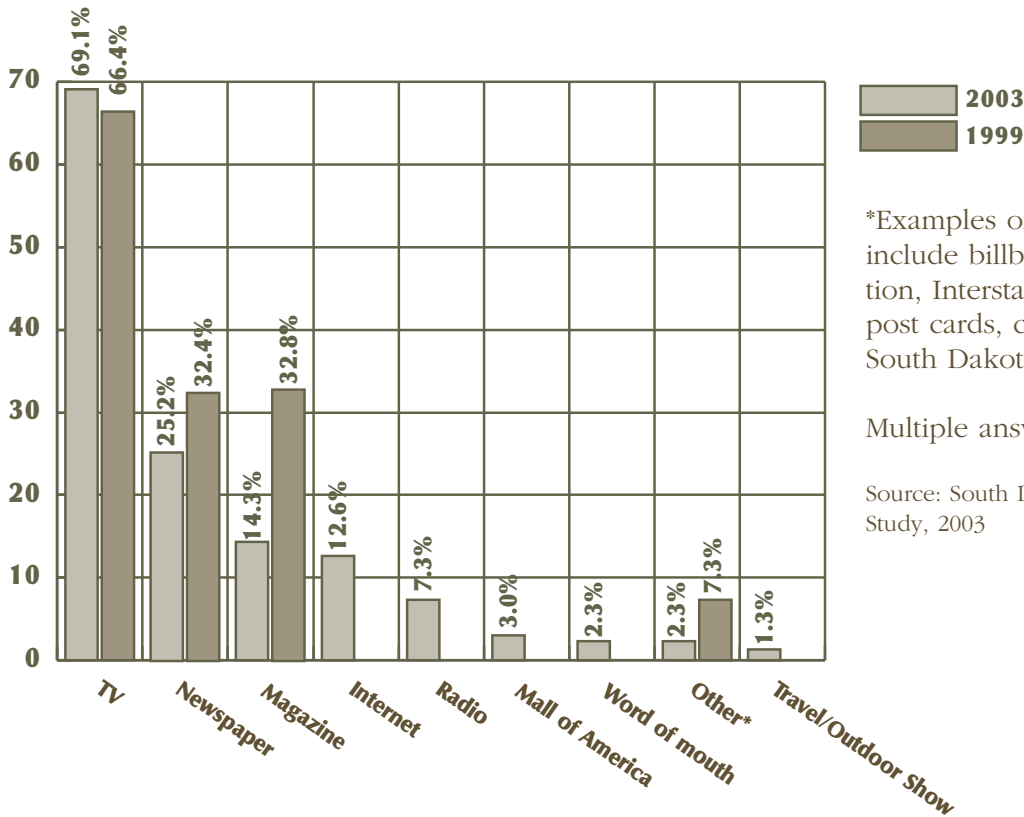


\*Travelers residing within Tourism's target markets.

Source: South Dakota Tourism Intercept Study, 2003

# South Dakota Advertising

(Among in-target travelers (68.3 percent) who recalled seeing South Dakota advertising at home)



\*Examples of other sources for 2003 include billboards, casino information, Interstate Information Centers, post cards, college professor and South Dakota brochures.

Multiple answers allowed.

Source: South Dakota Tourism Intercept Study, 2003