

RESEARCH AND MARKETING

Report for the month of August 2007 (AUG FY08)

Inquiries (BHCR)				
Details	Mail	Phone	Web	Total
JUL 2007	934	1,488	12,992	15,433
AUG 2007	586	1,144	8,626	10,356
% Change	-37.3%	-23%	-34%	-32.9%
	Aug '06	FY TD	CY TD	Season
% Change	+8.2%	+15.3%	+15.1%	+8.2%

BHCR = Black Hills Central Reservations
Season = Peak (March through July: This Report MAR-JUN)

Special Inquiries and Inventory				
Special Inqs	AUG 07	%ChgLstYr	JUL 07	%Chg
Regular	96	+43.3%	107	-10%
Reviewed	2,705	+0.6%	4,532	-40%
Inventory	AUG 07	JUL 07	Used in AUG	
Maps	447,740	811,860	364,120	
Vac. Guides	9,780	47,465	37,685	

Special Inquiries = Requests requiring individual attention
Regular = Requests receiving individual responses
Reviewed = Requests fulfilled through manual assignment

Travel Activity Indicators (SDTMS)				
	JUL 07	JUN 07	% Chg	%ChgLstYr
Traffic Counts	189,458	176,232	+7.5%	+1.9%
State Park Attendance	UA	1,163,493	--	--
Aggregate Attractions *	1,322,749	880,386	*	+0.3%
STR Overnight Ldg	539,724	510,806	+5.7%	+4.6%
STR Occupancy	80.3%	78.6%	+2.2%	+4.1%
STR Ldg Rates	\$80.88	\$74.38	+8.7%	+3.6%

SDTMS = South Dakota Travel Monitoring System UA = Unavailable
* Aggregate Attractions Counts contain varying numbers of reporting Attractions and are comparable only annually

Online Statistics			
AUG 2007	Visits	Ave ToS	Ave Depth
TravelSD.com	88,198	389s	5.7pages
% Chg JUL	-16%	-9%	-15%
SDVisit.com	+7%	+37%	+32%
TravelSmart	Emails Sent	Opened	Clicks
AUG 2007	208,850	28,354	8,996
% Chg JUL	-1.5%	-24.6%	-1.4%

Ave ToS= Average Time on Site in seconds
Ave Depth= Average number of pages viewed

Economic and Social Indicators (SDTMS)				
	JUL 07	JUN 07	% Chg	%ChgLstYr
TPI	251.3	249.1	+0.9%	+3.4%
CPI-U	208.3	208.4	-0.0%	+2.4%
CCI	111.9	105.3	+6.3%	+4.6%
Gas Prices	\$2.95	\$3.02	-2.3%	+0.8%
Vac Intention	42.0%	45.2%	-7.1%	+0.7%

TPI = Travel Price Index CPI-U = Consumer Price Index
CCI = Consumer Confidence Index

Information Center Activity				
Car Counts	US Cars	Canadian	Foreign	Total
JUL 2007	80,092	3,120	1,120	84,332
AUG 2007	83,174	3,432	1,393	87,999
% Chg Jul	3.8%	10.0%	24.4%	4.3%
%ChgLstYr	+5.6%	+5.4%	+9.3%	+5.7%
BUS People	5,199	BUS Days In SD		418 33%

BUS People = Total People Counted on Bus Tours in July.
BUS Days in SD = Total Days spent in SD by Bus Tours and percent of Total Tour days spent in SD.

Notable Reports, Secondary Research and Related Information

STR: RALLY LODGING NUMBERS UP SLIGHTLY

According to Smith Travel Research, occupancy in the Black Hills, Badlands and Lakes Region during the week of August 5 through August 11 was up by 0.8 percent in comparison to last year. This equates to a 2.5 percent increase in overnight stays and a 2.2 percent in overall revenue during the Sturgis Rally week.

OTTI: International Visitation up 10 percent in May, 12 percent in June. SPENDING EXCEEDED \$10 BILLION Year-To-Date Arrivals 8 Percent Above Last Year. The U.S. Department of Commerce announced that 3.8 million international visitors traveled to the United States in June 2007, an increase of 12 percent over June 2006. Total visitation for the first six months of 2007 was up over eight percent from the same period in 2006. International visitors also spent over \$10.0 billion during the month, up 14 percent from June 2006 and \$58.0 billion year-to-date, up 10 percent from the first six months in 2006.

OTTI = Office of Travel and Tourism Industries (US Dept. of Commerce) STR = Smith Travel Research