

To: Secretary Richard Benda

From: Billie Jo Waara

Date: 08/7/07

RE: July 2007 - 2010 Summary

Accomplishing the 2010 Initiative will take the Office of Tourism, the visitor industry and the State of South Dakota to a whole new level. I welcome your feedback and suggestions regarding this summary report. The second page of this report highlights key statistics representing the visitor industry compiled by the Research and Marketing team.

GOAL ONE: Double Visitor Spending from \$600 Million to \$1.2 Billion by 2010

Tourism Office Funding Update:	June 2006	June 2007	% Change
Deadwood Gaming Tax	\$242,264	\$266,380	9.95%
Tourism Promotion Tax	\$303,960	\$332,987	9.55%
Total Monthly Deposits	\$546,224	\$599,367	9.73%
FYTD 2008 vs. 2007	\$546,224	\$599,367	9.73%

1A. Change the way we market South Dakota.

- **Media Contacts:** For the annual Buffalo Roundup event, the Office invited 45 domestic and international journalists and group tour operators for a pre-fam to the Roundup. This year, the pre-fam includes tours of the Pine Ridge and Rosebud reservations for the first time.
- **Cultural & Heritage Tourism:** The Office facilitated an initial discussion with South Dakotans for the Arts, Arts Council, and the Historical Society to discuss the development of a new Cultural Heritage Tourism cooperative publication for the 2008 summer season.

1C. . . greater use of partnerships and cooperative efforts

- **Million Dollar Challenge:** The Governor's Tourism Board reviewed five new applications and approved one from the Sioux Falls Sports Marketing Authority for marketing of the Summit League Championship Basketball Tournament in Sioux Falls.
- **South Dakota Film Festival:** There are presently 22 films scheduled for showing at the festival in Aberdeen. There will be over 20 films presented at the event's first year. Tourism will assist organizers with event planning and marketing.
- **The Early Show on CBS:** Worked with producers of The Early Show on CBS for their live broadcast at Mount Rushmore National Memorial on August 9. In conjunction with CBS's "Great American Vacation" giveaway announcement, Tourism worked with industry partners for a South Dakota vacation giveaway, with registrations via KELO's web site and the winner to be announced on KELO's evening news on August 9.
- **Independence Day Celebration at Mount Rushmore National Memorial:** Tracking service estimated a national viewing audience of 52.8 million in 41 states. Tourism was a monetary sponsor as well as a member of the organizing committee.
- **2Nations Tours:** In partnership with tourism offices in North Dakota, Minnesota, and Manitoba, the Office will participate in cooperative marketing campaign and brochure. The Office also presented an update on the cooperative efforts of the 4 entities to the 2Nations Legislative Forum, comprised of 30 representatives from entity partners, held in Pierre at the Ramkota. The Forum is the group that originally developed this marketing concept.

1E. Capitalize on the existing outdoor opportunities in our state

Media Activity Highlights: Compilation of earned media: July – estimated ad value of \$45,456 (circ. of 699,527); Total 2007 – estimated ad value of \$474,327 (circ. of 16,332,078); and Fiscal Year 2008 – estimated ad value of \$45,456 (circ. of 699,527).

RESEARCH AND MARKETING

Report for the month of July 2007 (JUL FY08)

Inquiries (BHCR)				
Details	Mail	Phone	Web	Total
JUN 2007	1,544	1,582	15,195	18,321
JUL 2007	934	1,488	12,992	15,433
% Change	-39.5%	-6%	-14%	-15.8%
	Jul '06	FY TD	CY TD	Season
% Change	+20.6%	+20.6%	+15.7%	+17.9%

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

Special Fulfillments and Inventory			
Fulfillment	JUL 07	% Chg JUN	%ChgLstYr
Fulfillment Stats unavailable at time of report.			
Inventory	JUL 07	JUN 07	Difference
Maps	811,860	356,640	New Order
Vac. Guides	47,465	73,056	25,591

New Order = New Highway Maps received this month.

Travel Activity Indicators (SDTMS)				
	JUN 07	MAY 07	% Chg	%ChgLstYr
Traffic Counts	176,232	153,739	+14.6%	+0.0%
State Park Attendance	1,163,493	700,417	+66.1%	-1.0%
Aggregate Attractions *	880,366	394,190	*	+0.0%
STR Overnight Ldg	510,806	377,576	+35.3%	+8.9%
STR Occupancy	78.6%	56.4%	+39.4%	+7.7%
STR Ldg Rates	\$74.38	\$61.53	+20.9%	+3.1%

SDTMS = South Dakota Travel Monitoring System
* Aggregate Attractions Counts contain varying numbers of reporting Attractions total Attendance

Online Statistics				
JUL 2007	Visits	Ave ToS	Ave Depth	
TravelSD.com	105,408	425s	6.3pages	
Top Markets	MN	SD	IL	WI
sdvisit.com	2,993	359s	CO	CA
TravelSmart	Emails Sent	Opened	Clicks	
JUL 2007	211,991	37,598	9,126	
% Chg JUN	+2.3%	+3.5%	+5.1%	

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

Economic and Social Indicators (SDTMS)				
	JUN 07	MAY 07	% Chg	%ChgLstYr
TPI	249.1	246.1	+1.2%	+4.1%
CPI-U	208.4	207.9	+0.2%	+2.7%
CCI	105.3	108.5	-2.9%	-0.1%
Gas Prices	\$3.02	\$3.12	-3.2%	+7.6%
Vac Intention	45.2%	41.5%	+8.9%	+5.2%

TPI = Travel Price Index CPI-U = Consumer Price Index
CCI = Consumer Confidence Index * = Not Available

Information Center Activity				
Car Counts	US Cars	Canadian	Foreign	Total
JUN 2007	70,822	1,892	947	73,661
JUL 2007	80,092	3,120	1,120	84,332
% Chg Jun	13.1%	64.9%	18.3%	14.5%
%ChgLstYr	4.5%	3.9%	6.1%	6.0%
BUS People	5,597	BUS Days In SD	418	28%

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 TIA, TTRA and CTR Reports and other not so Minute Minutia

SDT: Travel Indicators Up in South Dakota

Interest in travel and tourism in South Dakota has risen nearly 18 percent for the months of March through July in comparison to last year. This increase in interest is mirrored by an increase in car counts and overnight stays.

Overall the efforts of the Office of Tourism and the Travel and Tourism Industry are being seeing across the state with an increase in Tourism Taxable Sales of 10.1 percent for the year ending June 30th.

OTTI: INTERNATIONAL VISITATION UP TWO PERCENT IN APRIL 2007

Year-To-Date Arrivals Seven Percent Above Last Year - The U.S. Department of Commerce announced that 4.0 million international visitors traveled to the United States in April 2007, an increase of almost two percent over April 2006. Total visitation in for the first four months of 2007 was up seven percent from the same period in 2006.

International visitors also spent \$9.7 billion during the month, up 10 percent from April 2006 and \$38.0 billion year-to-date, up eight percent from the same period in 2006.

SDT = South Dakota Office of Tourism OTTI = Office of Travel and Tourism Industries (US Dept. of Commerce)