

South Dakota Department of Tourism

**2003 Intercept Study
Final Report**

January 2004

TABLE OF CONTENTS

Survey Methodology	1
Executive Summary	2-4
Traveler Summary	5-6
Origin of Travelers	7-8
Length of Vacation	9-11
Accommodations	12
Vacation Destinations	13-14
Description of Travel Party	15-16
Traveler Connections to South Dakota	17-19
Impressions of South Dakota	20
Travel Plans to South Dakota	21-22
Advertising	23-24
Travel Information	25-28
Spending and Household Income	29-30

SURVEY METHODOLOGY

A total of 880 travelers were surveyed at nine different locations in South Dakota from May 22 through August 11, 2003.

The study includes 441 interviews with travelers residing within the Office of Tourism's target market area (Colorado, Illinois, Iowa, Minnesota, Missouri, Nebraska, North Dakota, Texas, and Wisconsin) and 439 interviews with travelers residing outside of the target market area. Travelers were interviewed at random. South Dakotans were not interviewed.

Interviews were conducted at:

Date	Location
May 22-25, 2003	Terry Redlin Art Center (Watertown)
June 7-8, 2003	Siouxland Renaissance Festival (Sioux Falls)
June 14-15, 2003	Wild Bill Hickok Days (Deadwood)
June 18-20, 2003	Corn Palace (Mitchell)
June 26-28, 2003	Mount Rushmore National Memorial (Keystone)
July 5-6, 2003	Lewis & Clark Information Center (Chamberlain)
July 18-20, 2003	State Capitol (Pierre)
July 25-27, 2003	Laura Ingalls Wilder Pageant (De Smet)
Aug. 11, 2003	Lewis & Clark Information Center (Chamberlain)

Please note: Percentages were carried out only to one-tenth and some questions allowed multiple answers. Therefore, total percentages may not equal 100 percent.

This document makes comparisons to the 1999 Intercept Study which was conducted July 25 through August 17, 1999, at various sites in South Dakota. A total of 841 travelers were interviewed for the 1999 study. Random interviews were conducted of 421 travelers from within South Dakota Tourism's target market area (same as 2003, except Indiana was included and Texas was not) and 420 travelers from outside the target market area. It is also important to note that interviews at three locations in 2003 were conducted during special events. The 1999 study did not include any interviews conducted at locales hosting special events.

EXECUTIVE SUMMARY

While, for most questions, no significant changes were recorded in the 2003 study, there were a few differences compared to 1999, most notably:

1. more respondents indicated that South Dakota was their destination,
 2. the respondents' impressions of South Dakota were even more positive,
 3. more respondents were influenced by advertising to come to South Dakota, and
 4. more respondents brought travel literature with them to South Dakota.
- **Travelers vacationed for an average of 8.6 days, spending 4.3 days in South Dakota.** (Pages 9-11.)

In 1999, travelers vacationed for an average of 11.1 days and spent 4.1 days in South Dakota. While travelers took shorter vacations by two and one-half days in 2003, the amount of time spent in South Dakota was slightly longer. In 2003, about half their vacation time was spent in South Dakota, while in 1999, only about one-third of their vacation time was spent in South Dakota.

It is further noted that the number of travelers taking 1-3 day vacations increased substantially in 2003. In 2003, 22 percent of the respondents were on a three-day-or-less vacation, while in 1999, 6.6 percent were on a three-day-or-less vacation. The fact that the 2003 study included interviews at special events may have influenced this finding.

- **Of the respondents who spent one or more nights in South Dakota, the majority of them stayed at motels.** Of the in-target respondents, nearly 64 percent stayed at motels, and of the out-of-target respondents, slightly more than 64 percent stayed at motels. (Page 12.)

Motel stays saw an increase from 1999, while the respondents not spending any nights and those staying at campgrounds decreased. This finding may have been influenced by the emphasis on vacation packages, which include hotel lodging, being made available by the South Dakota visitor industry and promoted by South Dakota Tourism. Fewer camping packages have been offered by the visitor industry.

- **More than three-fourths of the in-target respondents and slightly more than half of the out-of-target respondents indicated that South Dakota was their destination.** (Pages 13-14.)

Both groups marked significant increases over 1999. The in-target response rate increased by nearly 22 percentage points from 1999 and the out-of-target response rate increased by more than 17 percentage points from 1999. This increase in 2003 may have been influenced by traveler interviews being conducted at special events. This finding substantiates the need and effectiveness of special event promotion, particularly to strategically-targeted audiences.

As in 1999, the destinations within South Dakota were all over the state, with nearly half of the 2003 in-target respondents and almost three-fourths of the 2003 out-of-target respondents indicating some part of the Black Hills as their destination. Also as in 1999,

Wyoming/Yellowstone was the highest ranking destination of respondents whose destination was other than South Dakota.

- **Travel parties interviewed during the study contained an average of 3.3 people.** (Page 15.)

In 1999, travel parties contained an average of 3.2 people.

- **The average age of the adult traveler was 47.3 years old. Travelers over the age of 19 outnumbered child travelers by nearly 3.2 to 1. Genders of the adult travelers were nearly even.** (Page 16.)

Again, this compared similarly to 1999 when the average age of the adult traveler was 42.9 years old, with travelers over the age of 18 outnumbering child travelers by 4 to 1. (The age comparison between 2003 and 1999 is closer than it appears because the inclusion of 18-year-olds in 1999 would have skewed the average age slightly younger.)

- **Most respondents did not have friends or relatives living in South Dakota.** In-target respondents were slightly more likely to have friends or relatives than were out-of-target respondents. (Page 17.)

This compared almost identically to 1999, although the split for in-target respondents was somewhat greater in 2003 than it was in 1999.

- **Nearly three-fourths of the respondents had been to South Dakota before.** Their last time was an average of more than five and a half years ago. Most (90.1%) of those travelers rated South Dakota as better or the same as compared to their last trip. Of those travelers who had never been to South Dakota, nearly all (89.8%) rated South Dakota as better or about the same as they expected. (Pages 18-20.)

Similarly in 1999, nearly three-fourths of the respondents had been to South Dakota before. Their last time was an average of almost five years prior. Again, most (81.6%) of those travelers rated South Dakota as better or the same as compared to their last trip. And, of those travelers who had never been to South Dakota, a majority (66.5%) rated South Dakota as better or the same as they expected.

In all cases, respondents' answers of either "better than last time" or "better than expected" increased significantly between 1999 and 2003. Most notably, first time visitors' responses increased by more than 20 percentage points for both in-target and out-of-target respondents, although this is off-set somewhat by the "just arrived/don't know" respondents in 1999.

- **More than three-fifths of the respondents made their decision to come to/through South Dakota during the months of April, May and June.** (Page 21.)

In 1999, the respondents had tended to make their decision to come to/through South Dakota during the months of May, June, July and August.

(Readers are asked to keep in mind that the majority of the interviews in 2003 were completed earlier in the summer than the 1999 interviews.)

- **For the majority of respondents, it was a specific attraction, a specific event or patriotic sites that prompted the decision to consider South Dakota for their vacation.** (Page 22.)

(Note: In 1999, this was an open-ended question, while in 2003 it was multiple choice.)

- **More than two-thirds (68.3%) of respondents originating from South Dakota's target market states had seen South Dakota advertising. More than half (55.1%) of these travelers said the advertising influenced their decision to visit South Dakota.** Most of the advertising was seen via television. (Page 23.)

While nearly the same amount had seen advertising in 1999, there was a significant increase in the number of respondents who indicated that the advertising had influenced their decision of more than 40 percentage points. Also, television remained the primary source for the advertising, and increased by about 3 percentage points over 1999.

Two-fifths (40%) of the respondents originating from outside the target market states had seen South Dakota advertising, and of those respondents, nearly three-fifths (58.5%) said the advertising influenced their decision to visit South Dakota. Again, most of the advertising was seen via television. (Page 24.)

Compared to 1999, there was a nominal increase in the number of respondents who had seen advertising, however significantly more indicated that the advertising influenced their decision. Three-fifths were influenced by the advertising which was an increase of 28 percentage points from 1999. Again, television was the primary source, but increased by nearly 12 percentage points from 1999 to 2003.

- **Nearly three-fifths of the respondents brought South Dakota travel literature with them.** For both in-target and out-of-target respondents, most got their travel literature from the Internet or from South Dakota. (Pages 25-28.)

In 1999, only about one-third of the respondents brought South Dakota travel literature with them – more than 22 percentage points less than in 2003. AAA was a primary source of the travel literature in 1999.

- **Survey respondents spent an average of \$168.93 per day, per travel party. The average annual household income of these visitors was \$72,682.** (Pages 29-30.)

Even with inflation, it appears that South Dakota visitors, in general, have continued to become more upscale. The 1999 average annual income was \$59,664, and travelers spent an average of \$144.26 per day, per travel party.

TRAVELER SUMMARY

Profile of In-Target Traveler, 2003

- 3.4 people in travel party
- Average age of adult traveler was 46.6 years. Travelers over age 19 outnumbered child travelers by 3.6 to 1.
- Took a 6.3-day vacation
- Spent an average of 3.9 days in South Dakota
- More than four-fifths (85.5%) had been to South Dakota before.
- Last time here was about 4.7 years ago
- Most (89.1%) rated South Dakota as better or the same as compared to their last trip.
- More than four-fifths (85.9%) of those who had never been to South Dakota rated it as better or the same as they expected.
- More than two-thirds (68.3%) had seen South Dakota advertising. Of that, more than half (55.1%) said the advertising influenced their decision to come to South Dakota.
- Spent \$164.44 per day, per travel party, on entire vacation
- Destination was South Dakota (76.9%)

Profile of In-Target Traveler, 1999

- 3.2 people in travel party
- Average age of adult traveler was 40.1 years. Travelers over age 18 outnumbered child travelers by 3.2 to 1.
- Took an 8.3-day vacation
- Spent an average of 4 days in South Dakota
- More than four-fifths (83.8%) had been to South Dakota before.
- Last time here was about 4.5 years ago
- Most (82.2%) rated South Dakota as better or the same as compared to their last trip.
- More than three-fifths (64.7%) of those who had never been to South Dakota rated it as better or the same as they expected.
- More than half (61.5%) had seen South Dakota advertising. Of that, not even one-fifth (15%) said the advertising influenced their decision to come to South Dakota.
- Spent \$141.54 per day, per travel party, on entire vacation
- Destination was South Dakota (55.1%)

Profile of Out-of-Target Traveler, 2003

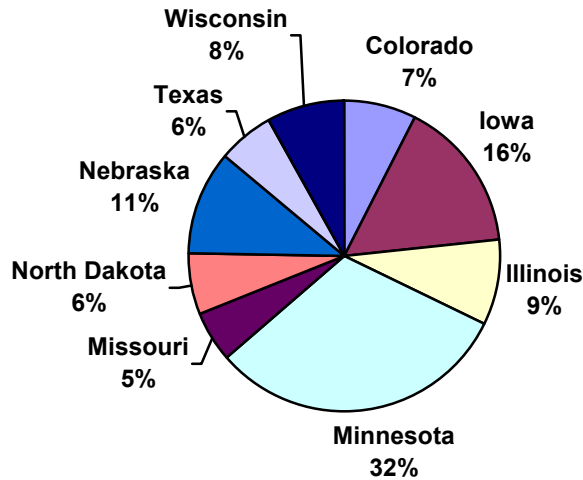
- 3.2 people in travel party
- Average age of adult traveler was 48 years. Travelers over age 19 outnumbered child travelers by 2.9 to 1.
- Took a 10.9-day vacation
- Spent 4.7 days in South Dakota
- More than three-fifths (61.3%) had been to South Dakota before.
- Last time in South Dakota was 6.8 years ago
- Most of the respondents (91.1%) who had been to South Dakota before rated it as better or the same as compared to their last trip.
- Most (93.6%) of those who had never been to South Dakota rated it as better or the same as they expected.
- Two-fifths (40%) had seen South Dakota advertising. Of that, nearly three-fifths (58.5%) said the advertising influenced their decision to come to the state.
- Spent \$173.42 per day, per travel party, on entire vacation
- Destination was South Dakota (51.5%)

Profile of Out-of-Target Traveler, 1999

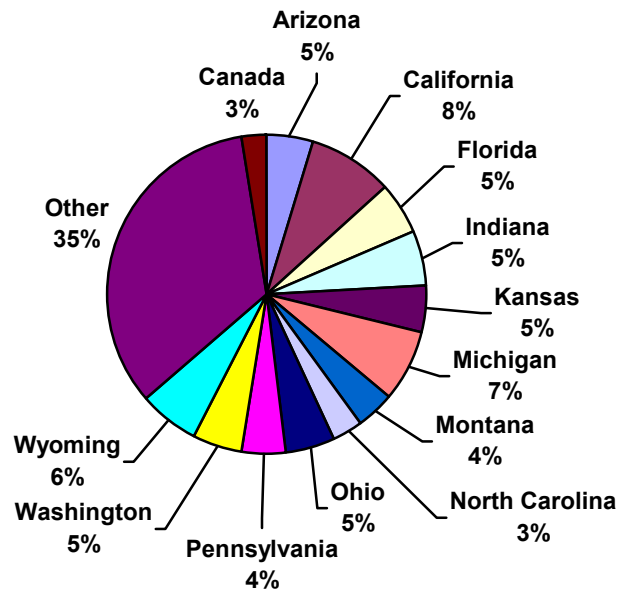
- 3.2 people in travel party
- Average age of adult traveler was 45.1 years. Travelers over age 18 outnumbered child travelers by 4.4 to 1.
- Took a 13.9-day vacation
- Spent 4.2 days in South Dakota
- More than half (57.4%) had been to South Dakota before.
- Last time in South Dakota was six years ago
- More than three-fourths (81%) of the respondents who had been to South Dakota before rated it as better or the same as compared to their last trip.
- Nearly three-fourths (68.2%) of those who had never been to South Dakota rated it as better or the same as they expected.
- More than one-fourth (27.9%) had seen South Dakota advertising. Of that, less than one-third (30.4%) said the advertising influenced their decision to come to the state.
- Spent \$147.02 per day, per travel party, on entire vacation
- Destination was Wyoming/Yellowstone (34.3% said South Dakota was their destination)

ORIGIN OF TRAVELERS, 2003

In-target

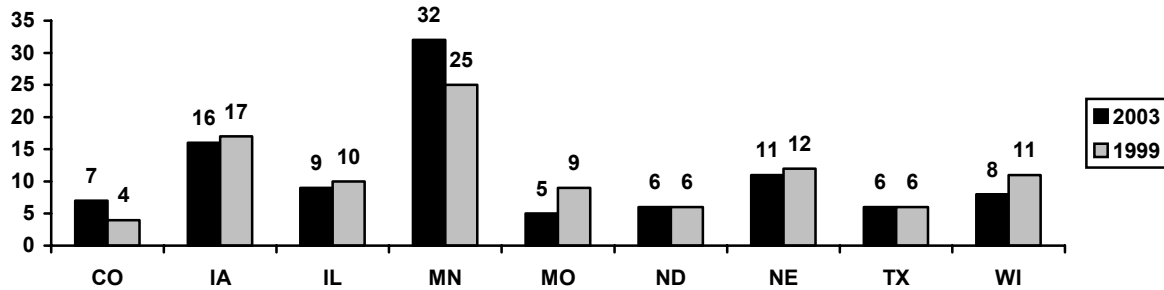


Out-of-target

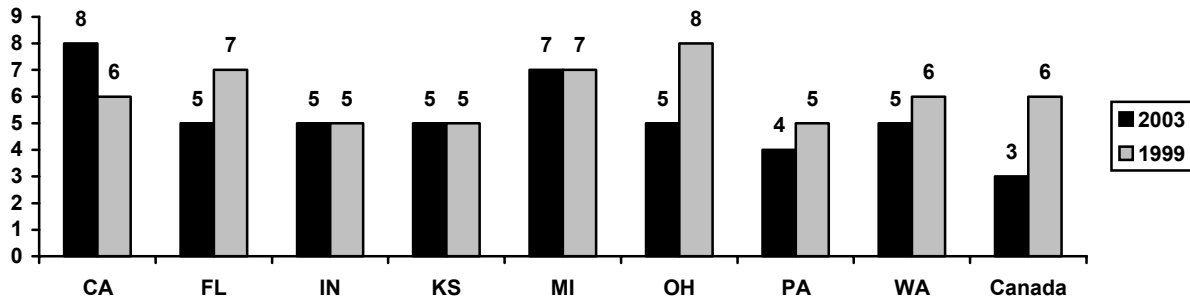


- In 2003, Minnesota yielded the greatest number of in-target travelers to South Dakota. While Minnesota also ranked first in this category in 1999, the percentage increased from 26 percent to 32 percent.

A Comparison of In-Target Travelers by percentage: 2003 vs. 1999



A Comparison of Out-of-Target Travelers by percentage: 2003 vs. 1999



- The out-of-target origins specified above comprise 47.0 percent of all out-of-target travelers surveyed in 2003. Not shown on the graph are Arizona, Montana, North Carolina and Wyoming, which together made up 18.0 percent of the out-of-target respondents in 2003. The remaining 35.0 percent included 26 states and 11 foreign countries.
- In 2003, only the state of California showed an increase for out-of-target travelers to South Dakota as compared to 1999.

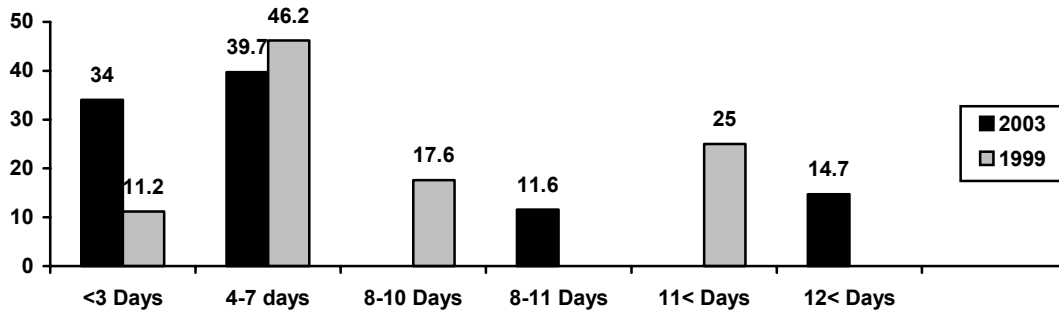
LENGTH OF VACATION

Total Vacation Days (In-Target)	2003 Percent	1999 Percent	Total Vacation Days (Out-of-Target)	2003 Percent	1999 Percent
3 days or less	34.0	11.2	3 days or less	10.0	1.9
4-7 days	39.7	46.2	4-7 days	26.2	16.8
8-11 days	11.6	17.6 *	8-11 days	14.1	16.1 *
12 or more days	14.7	25.0 *	12 or more days	49.7	65.2 *
Average vacation days:		6.3 days	8.3 days	Average vacation days:	
				10.9 days	13.9 days

* For 1999, the ranges for the number of days were 8-10 days, 11-14 days and 15+ days. The 17.6 and 16.1 percentages are for 8-10 days and the 25.0 and 65.2 percentages are for 11 or more days (combinations of the results for 11-14 days and 15+ days).

Total Vacation Days in South Dakota (In-Target)	2003 Percent	1999 Percent	Total Vacation Days in South Dakota (Out-of-Target)	2003 Percent	1999 Percent
1	11.3	22.4	1	6.8	19.6
2	21.3	14.3	2	21.9	19.8
3	18.1	14.0	3	18.2	16.0
4	20.6	13.8	4	16.2	11.2
5	9.1	12.9	5	10.7	11.0
6	5.7	6.0	6	4.6	1.9
7	8.6	7.1	7	9.1	7.2
8	1.6	2.6	8	2.5	2.1
9	1.1	1.2	9	0.7	1.2
10	1.1	2.1	10	2.5	3.6
11	0.0	0.2	11	0.2	0.5
12 or more	1.6	3.3	12 or more	6.6	6.1
Average days in SD:		3.9 days	4.0 days	Average days in SD:	
				4.7 days	4.2 days

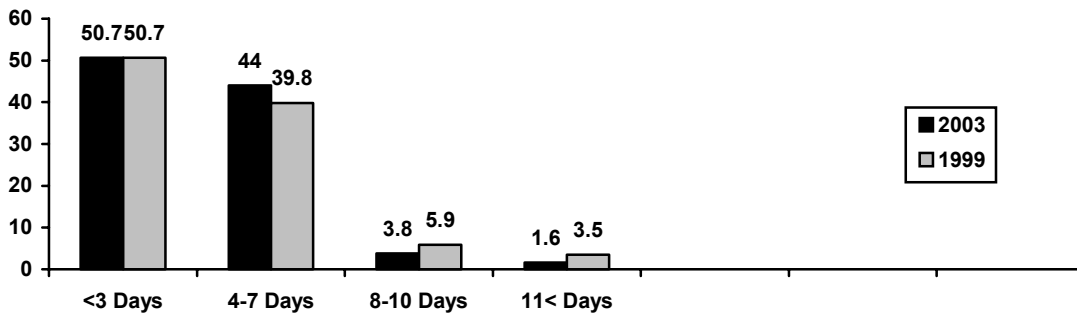
Total Vacation Days (in-target) by percentage: 2003 vs. 1999



2003 average: 6.3 days

1999 average: 8.3 days

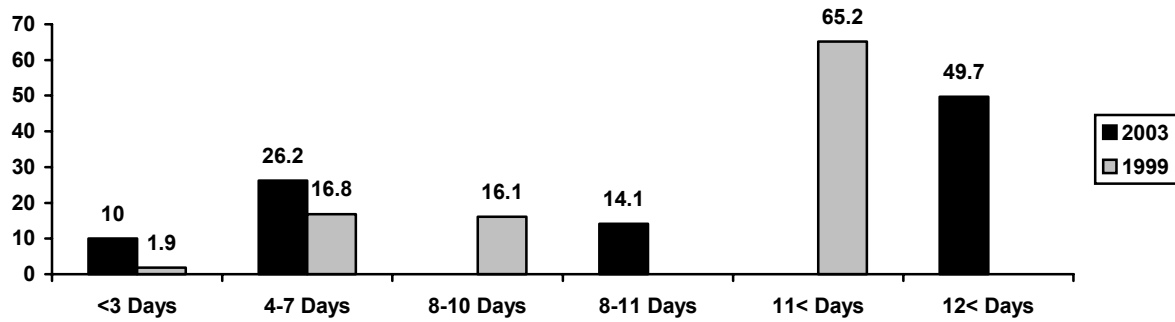
Total Vacation Days in South Dakota (in-target) by percentage: 2003 vs. 1999



2003 average: 3.9 days

1999 average: 4 days

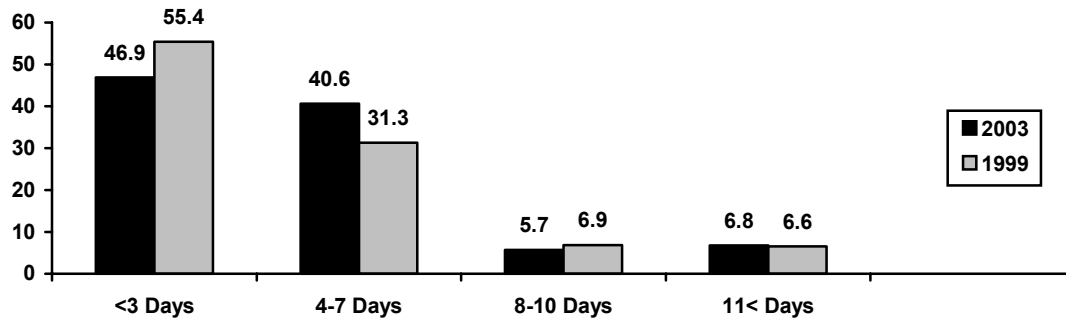
Total Vacation Days (out-of-target) by percentage: 2003 vs. 1999



2003 average: 10.9 days

1999 average: 13.9 days

Total Vacation Days in South Dakota (out-of-target) by percentage: 2003 vs. 1999



2003 average: 4.7 days

1999 average: 4.2 days

ACCOMMODATIONS

Type (In-Target)	2003 Percent	1999 Percent
Motel	63.9	45.4
Campground	17.7	29.5
Won't spend any nights	11.6	18.0
Friends or relatives	8.8	10.0
Bed & Breakfast/Lodge	2.7	3.8
Other	--	0.7

Type (Out-of-Target)	2003 Percent	1999 Percent
Motel	64.2	51.0
Campground	23.9	36.7
Friends or relatives	9.1	6.2
Won't spend any nights	6.4	10.1
Bed & Breakfast/Lodge	1.8	1.0
Other	--	1.0

DESTINATIONS

Vacation Destination	2003 Percent (In)	1999 Percent (In)	2003 Percent (Out)	1999 Percent (Out)
South Dakota	76.9	55.1	51.5	34.3
Other	23.1	44.9	48.5	65.7

Top Destinations in South Dakota in 2003 (In)	Percent	Top Destinations in South Dakota in 1999 (In)	Percent
Sioux Falls	16.2	Sturgis	33.0
Black Hills	14.2	Black Hills	25.4
Rapid City	11.5	Other	13.3
Mount Rushmore	11.2	Rapid City	12.5
Other*	9.4	Mount Rushmore	5.0
Terry Redlin Art Center	8.8	Around	4.2
Laura Ingalls Wilder Pageant	8.3	Custer/Custer State Park	3.8
Deadwood	7.7	Deadwood	3.3
Pierre	3.5	Sioux Falls	2.9
Watertown	3.2	Spearfish	2.1
South Dakota in general	2.7	Pierre	2.1
Brookings	1.5	Badlands	1.3
Aberdeen	1.2	Watertown	1.3
Badlands	1.2	Hill City	0.8
Keystone	1.2		
Spearfish	1.2		

*Examples of "other" 2003 destinations included: Chamberlain, Corn Palace, Hill City, and Mitchell.

Top Destinations in South Dakota in 2003 (Out)	Percent	Top Destinations in South Dakota in 1999 (Out)	Percent
Mount Rushmore	25.3	Sturgis	29.1
Black Hills	18.6	Black Hills	23.5
Other*	12.8	Around	17.9
Deadwood	11.5	Other	10.1
Rapid City	9.7	Mount Rushmore	6.1
Sioux Falls	4.1	Rapid City	6.1
South Dakota in general	5.3	Midwest	4.5
Laura Ingalls Wilder Pageant/De Smet	3.1	Sioux Falls	2.8
Custer State Park	2.2	Badlands	1.7
Sturgis	1.8	Deadwood	1.7
Watertown	1.8	Aberdeen	1.1
Wild Bill Hickok Days	1.8		

*Examples of "other" 2003 destinations included: Hill City, Pierre, Badlands, Cheyenne and Pine Ridge Indian Reservations, Crazy Horse, Keystone, Mitchell, and Spearfish.

Destinations other than South Dakota in 2003 (In)	Percent	Destinations other than South Dakota in 1999 (In)	Percent
Wyoming/Yellowstone	27.5	Wyoming/Yellowstone	17.3
Other*	13.7	North Dakota	12.4
Cross country trip	7.8	Montana	11.9
North Dakota	7.8	Minnesota	11.9
Colorado	6.9	Other	9.2
Michigan	5.9	Canada	8.1
Canada	5.0	Colorado	5.9
Midwest in general	3.9	Nebraska	4.3
Montana	3.9	Idaho	4.3
Nebraska	2.9	No response	4.3
Idaho	2.9	Washington	3.8
Oregon	2.9	Oregon	3.2
Wisconsin	2.9	Iowa	2.7
Washington	2.9	Alaska	2.2
California	2.0	California	2.2
U.S. State Capitals	2.0		
Nevada	2.0		

*Examples of “other” 2003 destinations included: Iowa, Kansas, Pennsylvania, Glacier National Park, Grand Tetons, Missouri, touring Northern U.S.A., and the West Coast.

Destinations other than South Dakota 2003 (Out)	Percent	Destinations other than South Dakota in 1999 (Out)	Percent
Wyoming/Yellowstone	22.1	Wyoming/Yellowstone	16.6
Cross country trip	15.0	Other	11.5
Other*	13.1	Montana	9.8
Minnesota	9.9	Minnesota	8.5
Midwest in general	6.6	North Dakota	7.7
Colorado	5.6	Washington	6.4
Montana	3.8	Wisconsin	6.0
North Dakota	2.8	Iowa	5.1
Illinois	2.8	Canada	4.3
Washington	2.8	Colorado	3.8
Nevada	2.3	Michigan	3.8
Wisconsin	2.3	California	3.4
California	1.9	Nebraska	3.0
Canada	1.4	Alaska	2.6
Following Lewis & Clark Trail	1.4	East Coast	2.6
Nebraska	1.4	Missouri	2.6
Oregon	1.4	West Coast	2.1
Idaho	1.4	Idaho	1.7
		Oregon	1.7
		Illinois	1.3
		Indiana	1.3
		Ohio	1.3

*Examples of “other” 2003 destinations included: Alaska, East Coast, Maine, Michigan, New York, U.S. Capitals.

DESCRIPTION OF TRAVEL PARTY

Size of Travel Party 2003 (In-Target)	Percent	Size of Travel Party 1999 (In-Target)	Percent
1	5.2	1	8.6
2	43.1	2	41.8
3	12.2	3	12.4
4	20.9	4	22.3
5	10.0	5	8.6
6	3.4	6	4.3
7	1.1	7	0.2
8	0.5	8	0.7
9	0.9	9	0.2
10	0.9	10	0.2
11 or more	1.8	11 or more	0.7

Average #/party in 2003: 3.4 people

Average #/party in 1999: 3.2 people

Size of Travel Party 2003 (Out-of-Target)	Percent	Size of Travel Party 1999 (Out-of-Target)	Percent
1	7.5	1	7.4
2	45.8	2	48.4
3	11.4	3	14.6
4	19.6	4	18.6
5	7.7	5	4.5
6	3.4	6	2.1
7	2.5	7	0.7
8	0.7	8	1.9
9	0.0	9	0.0
10	0.0	10	0.0
11 or more	1.1	11 or more	1.7

Average #/party in 2003: 3.2 people

Average #/party in 1999: 3.2 people

Age of adults in travel party in 2003 (In-Target)	Percent	Age of adults in travel party in 1999 (In-Target)	Percent
19-24	5.2	18-24	5.1
25-34	11.1	25-34	11.6
35-54	53.7	35-54	45.0
55-64	26.3	55-64	18.4
65+	3.7	65+	19.9

Ave. age of 2003 adult traveler (In): 46.6

Ave. age of 1999 adult traveler (In): 40.1

Age of adults in travel party in 2003 (Out-of-Target)	Percent	Age of adults in travel party in 1999 (Out-of-Target)	Percent
19-24	5.3	18-24	3.5
25-34	8.1	25-34	8.9
35-54	49.0	35-54	37.4
55-64	35.1	55-64	22.1
65+	2.4	65+	28.1

Ave. age of 2003 adult traveler (Out): 48.0

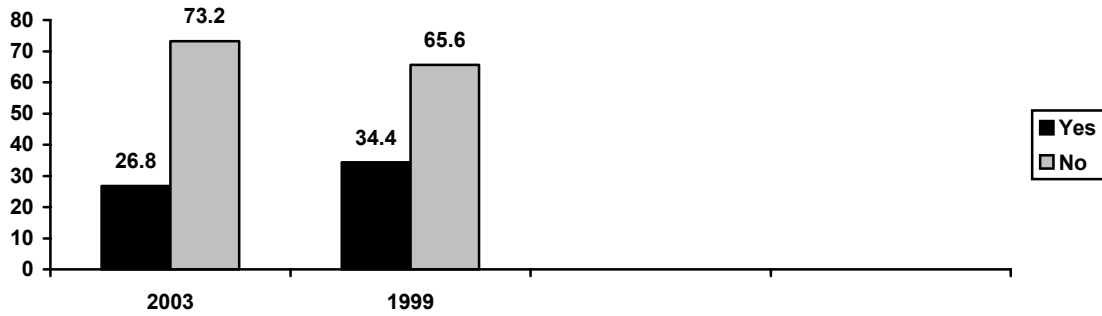
Ave. age of 1999 adult traveler (Out): 45.1

Gender of adults in travel party in 2003 (In-Target)	Percent	Gender of adults in travel party in 1999 (In-Target)	Percent
Male	47.3	Male	52.9
Female	52.7	Female	47.1

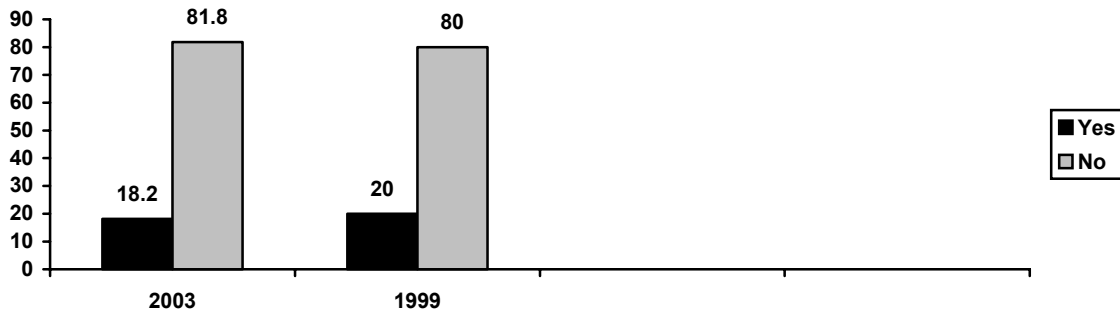
Gender of adults in travel party in 2003 (Out-of-Target)	Percent	Gender of adults in travel party in 1999 (Out-of-Target)	Percent
Male	48.9	Male	51.0
Female	51.1	Female	49.0

TRAVELER CONNECTIONS TO SOUTH DAKOTA

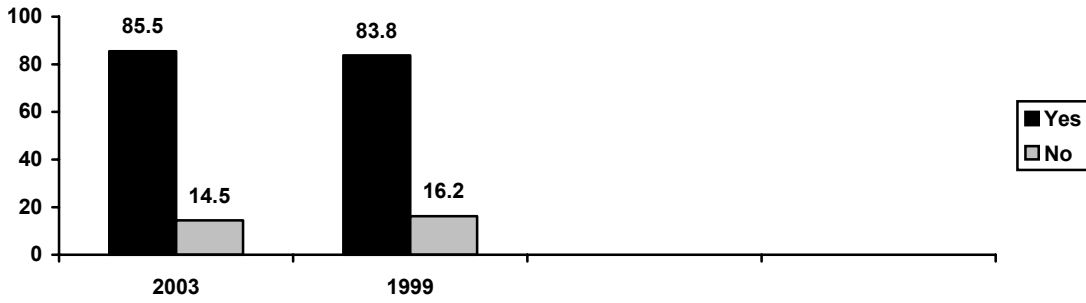
Friends and relatives living in South Dakota by percentage (In-Target):



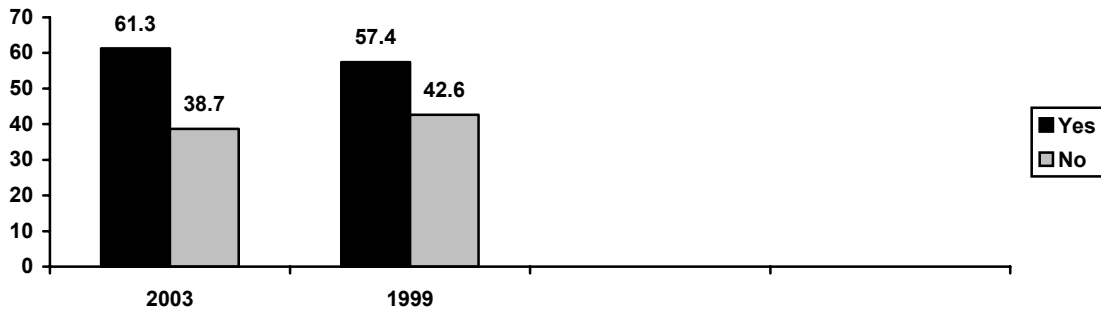
Friends and relatives living in South Dakota by percentage (Out-of-Target):



Have you been to South Dakota before? (In-Target) by percentage:



Have you been to South Dakota before? (Out-of-Target) by percentage:



**How many years ago were you
in South Dakota?
(In-Target)**

	2003 Percent	1999 Percent
Earlier this year	24.3	25.1
1 year ago	20.1	24.3
2 years ago	9.0	11.1
3 years ago	8.2	6.6
4 years ago	4.0	4.0
5 years ago	3.7	3.1
6 years ago	3.4	1.1
7 years ago	3.7	2.0
8 years ago	2.9	0.6
9 years ago	1.3	0.0
10+ years ago	19.3	22.0

**2003 Average:
4.7 years ago**

**1999 Average:
4.5 years ago**

**How many years ago were you
in South Dakota?
(Out-of-Target)**

	2003 Percent	1999 Percent
Earlier this year	11.5	9.6
1 year ago	14.5	25.0
2 years ago	8.6	10.8
3 years ago	7.8	8.8
4 years ago	4.5	4.6
5 years ago	6.7	3.8
6 years ago	6.3	2.9
7 years ago	4.5	2.9
8 years ago	3.0	2.1
9 years ago	1.1	1.3
10+ years ago	31.6	28.3

**2003 Average:
6.8 years ago**

**1999 Average:
6.0 years ago**

IMPRESSIONS OF SOUTH DAKOTA

Impression of South Dakota compared to previous visit (In-Target)	2003 Percent	1999 Percent
About the same	47.5	64.9
Better than last time	41.6	17.3
Just arrived	10.3	11.3
Not as good	0.5	5.4
No answer	--	0.8
Different	--	0.3

Impression of South Dakota compared to previous visit (Out-of-Target)	2003 Percent	1999 Percent
About the same	39.4	51.5
Better than last time	51.7	29.5
Just arrived	8.6	13.7
Not as good	0.4	3.7
No answer	--	1.2
Different	--	0.4

First time visitor impression of South Dakota (In-Target)	2003 Percent	1999 Percent
Better than expected	57.8	29.4
About what expected	28.1	35.3
Not as good as expected	0.0	0.0
Just arrived/don't know	14.1	33.8
No answer	--	1.5

First time visitor impression of South Dakota (Out-of-Target)	2003 Percent	1999 Percent
Better than expected	71.2	36.9
About what expected	22.4	31.3
Not as good as expected	0.6	1.1
Just arrived/don't know	5.9	28.5
No answer	--	1.7
Different	--	0.6

TRAVEL PLANS TO SOUTH DAKOTA

When did you make the decision to come to/ through South Dakota? 2003 (In-Target)	Percent	When did you make the decision to come to/ through South Dakota? 1999 (In-Target)	Percent
January	5.0	March	5.0
February	3.6	April	6.0
March	8.2	May	7.7
April	13.8	June	18.9
May	22.4	July	23.1
June	28.0	August	15.2
July	11.1	September	0.7
August	0.0	October	0.5
September	0.5	November	0.7
October	1.1	December	2.0
November	1.1	1 year ago	6.7
December	5.2	Annual	0.5

June 1998	0.2
July 1997	0.2
July 1998	2.2
August 1997	0.2
November 1998	0.2
6 months ago	9.7

When did you make the decision to come to/ through South Dakota? 2003 (Out-of-Target)	Percent	When did you make the decision to come to/ through South Dakota? 1999 (Out-of-Target)	Percent
January	7.1	March	7.8
February	5.0	April	6.4
March	6.2	May	11.6
April	16.9	June	12.8
May	16.4	July	17.6
June	26.0	August	7.6
July	7.7	September	0.7
August	3.9	October	0.2
September	1.1	November	1.7
October	0.5	December	1.4
November	1.8	1 year ago	11.2
December	7.5	July 1998	2.6
		6 months ago	18.1
		Years ago	0.2

What in particular prompted you to consider South Dakota? 2003 (In-Target)	Percent	What in particular prompted you to consider South Dakota? 1999 (In-Target)	Percent
Specific attraction	44.7	Rally/Sturgis	22.3
Patriotic sites	33.3	Traveling through	20.2
Specific event	31.5	Family/friends	18.1
Family/friends	21.3	Other	12.6
Passing through	9.8	On the way	10.2
Other*	8.2	Mount Rushmore	7.8
Many sites to see	2.0	Black Hills	5.7
Business	1.4	Never been	3.3
Lewis & Clark Trail	1.4	Love it/Like it	2.9
Close to home	0.7	Close	2.1
Advertisement seen/heard	0.5	Scenery/beauty	2.1
		Annual trip	1.4
		No answer	1.4
		Deadwood/gambling	1.0
		Fishing	0.7
		Reunion	0.7

*Examples of “other” reasons in 2003 included: Nothing specific, convention, traveling cross country.

(Note: In 1999, this was an open-ended question, while in 2003 it was multiple choice.)

What in particular prompted you to consider South Dakota? 2003 (Out-of-Target)	Percent	What in particular prompted you to consider South Dakota? 1999 (Out-of-Target)	Percent
Specific attraction	49.7	On the way	17.4
Patriotic sites	44.6	Family/friends	16.0
Passing through	28.0	Mount Rushmore	16.0
Specific event	21.9	Sturgis Rally	15.2
Family/friends	18.2	Traveling through	15.2
Other*	8.9	Other	9.8
Many sites to see	2.7	Black Hills	6.2
Traveling cross country	2.7	Never been	5.7
Never been to S.D. before	1.8	Badlands	3.3
Lewis & Clark Trail	1.1	Scenery	2.4
Close to home	0.2	No answer	1.9
		Crazy Horse	1.7
		Love it/Like it	1.2
		Deadwood	1.0
		Part of tour	1.0
		Reunion	1.0

*Examples of “other” reasons in 2003 included: Missionary trip, traveling across the Midwest, and business.

(Note: In 1999, this was an open-ended question, while in 2003 it was multiple choice.)

ADVERTISING

Do you recall seeing any advertising for South Dakota while at home? (In-Target)	2003 Percent	1999 Percent
Yes	68.3	61.5
No	31.7	38.5

If yes, where did you see it? (In-Target)	2003 Percent	1999 Percent
TV	69.1	66.4
Newspaper	25.2	32.4
Magazine	14.3	32.8
Internet/web	12.6	--
Radio	7.3	--
Mall of America	3.0	--
Word of mouth	2.3	--
Other*	2.3	7.3
Travel/Outdoor Show	1.3	--

*Examples of "other" sources for 2003 included: billboards, casino information, information centers, post cards, college professor, and S.D. brochures.

Did advertising influence your decision to come to South Dakota? (In-Target)	2003 Percent	1999 Percent
Yes	55.1	15.0
No	44.2	80.7
Not Sure	0.7	4.3

Do you recall seeing any advertising for South Dakota while at home? (Out-of-Target)	2003 Percent	1999 Percent
Yes	40.0	27.9
No	60.0	72.1

If yes, where did you see it? (Out-of-Target)	2003 Percent	1999 Percent
TV	56.2	44.4
Magazine	19.9	44.4
Internet/web	10.2	--
Newspaper	9.7	14.5
Word-of-mouth	7.4	--
Radio	5.1	--
Other*	4.5	19.7
Travel/Outdoor Show	2.3	--
Mall of America	0.6	--

*Examples of "other" sources included: billboards, art galleries, books, Ducks Unlimited Banquet, magazines, Sam's Club, and talk tour.

Did advertising influence your decision to come to South Dakota? (Out-of-Target)	2003 Percent	1999 Percent
Yes	58.5	30.4
No	41.5	63.4
Not Sure	--	6.3

TRAVEL INFORMATION

Did you bring any travel literature about South Dakota with you? (In-Target)	2003 Percent	1999 Percent
Yes	54.2	33.5
No	45.8	66.5

If yes, where did you get that literature? (In-Target)	2003 Percent	1999 Percent
From South Dakota	36.0	32.6
Internet	32.6	9.2
AAA	21.8	36.2
Other*	14.2	23.4
S.D. Regional/Local Visitor Association (/Chamber of Commerce)	13.4	4.3
Travel agent	0.8	0.7
no answer	--	2.1

*Other literature sources (In-Target)	2003 Percent	1999 Percent
Magazine	26.5	--
Newspaper	26.5	16.7
Library	11.8	3.3
Mall of America	8.8	--
Previous visit info.	8.8	3.3
Family/Friends	5.9	16.7
Bookstore	2.9	--
Hotel/Restaurant	2.9	--
Info. Centers	2.9	16.7
KOA (Campground)	2.9	--
Sport & travel show	2.9	3.3
Terry Redlin Art Center Calendar	2.9	--
Atlas/maps	--	13.3
Books/travel book (guide)	--	16.7
Brochures	--	3.3
Custer State Park	--	3.3
No response	--	6.7
Tourism	--	6.7

What literature did you bring? (In-Target)	2003 Percent	1999 Percent
Internet information	28.9	--
South Dakota Vacation Guide	28.0	16.3
S.D. Highway Map	25.9	--
AAA trip planner	22.6	29.8
Other*	20.9	7.1
Traveler Magazine	9.2	7.8
South Dakota newspaper/magazine insert	8.4	2.8
Lewis and Clark Trail Guide	2.1	--
No answer	--	42.6

*Other literature brought along (In-Target)	2003 Percent	1999 Percent
S.D. Brochures	36.0	--
Literature from Info./Visitor Center	22.0	10.0
Information on Siouxland Renaissance Festival	14.0	--
Chamber information	6.0	--
Information from Mall of America	4.0	--
Books	2.0	--
Casino information	2.0	--
Fishing guide	2.0	--
Information on Terry Redlin Art Center	2.0	--
KOA information	2.0	--
Maps/South Dakota map	2.0	40.0
Pierre information	2.0	--
South Dakota travel packs	2.0	--
Travel CDs/tapes	2.0	--
Literature	--	20.0
Newspaper	--	10.0
Travel Guide	--	10.0
Travel Show	--	10.0

Did you bring any travel literature about South Dakota with you? (Out-of-Target)	2003 Percent	1999 Percent
Yes	64.0	39.6
No	36.0	60.4

If yes, where did you get that literature? (Out-of-Target)	2003 Percent	1999 Percent
AAA	33.5	53.0
Internet	33.8	4.8
From South Dakota	28.8	21.7
S.D. Regional/Local Visitor Association (/Chamber of Commerce)	17.1	0.6
Other*	11.7	23.5
Travel agent	0.7	1.8
no answer	--	1.8

*Other literature sources (Out-of-Target)	2003 Percent	1999 Percent
Magazines	27.3	5.6
Family/Friends	18.2	16.7
Hotel/Restaurant	9.1	--
Mall of America	9.1	--
KOA information	6.1	--
Library	6.1	2.8
Newspaper	6.1	--
From Japan	3.0	--
From NC	3.0	--
Info. Centers	3.0	8.3
Outdoor Show	3.0	--
RV trip planner	3.0	--
Shopping center	3.0	--
No answer	--	22.2
Atlas/maps	--	19.4
Tourism	--	13.9
Books/travel book (guide)	--	2.8
Insurance company	--	2.8
Previous visit info.	--	2.8
Rally info. center	--	2.8
Self	--	8.3

What literature did you bring? (Out-of-Target)	2003 Percent	1999 Percent
AAA trip planner	32.7	44.0
Internet information	32.4	--
South Dakota Vacation Guide	26.3	13.9
Other*	23.1	5.4
S.D. Highway Map	16.0	--
Traveler Magazine	11.4	9.0
South Dakota newspaper/magazine insert	4.6	1.8
Lewis and Clark Trail Guide	1.4	--
No answer	--	31.5

*Other literature brought along (Out-of-Target)	2003 Percent	1999 Percent
S.D. Brochures	43.1	--
Literature from Info. Center	26.1	--
Books	9.2	--
Siouxland Renaissance Festival information	7.7	--
Chamber information	4.6	--
Black Hills information	1.5	--
Information on Terry Redlin Art Center	1.5	--
KOA information	1.5	--
Map/atlas	1.5	11.1
RV trip planner	1.5	--
Traveler CDs/tapes	1.5	--
Can't remember/no answer	--	44.4
AAA (travel) atlas/book	--	11.1
Commerce	--	11.1
Map/tour books/internet	--	11.1
Motorhome books	--	11.1

SPENDING AND HOUSEHOLD INCOME

Total spending per day for entire travel party on entire vacation (In-Target)	2003 Percent	1999 Percent
Less than \$100	28.6	37.8
\$100-199	42.6	47.7
\$200-299	24.7	11.9
\$300-399	2.7	1.9
\$400-499	0.2	0.5
\$500-599	0.7	0.2
\$600-699	0.2	--
Over \$600	--	0.0
Over \$700	0.2	--

**2003 average spending:
\$164.44 per day**

**1999 average spending:
\$141.54 per day**

Total spending per day for entire travel party on entire vacation (Out-of-Target)	2003 Percent	1999 Percent
Less than \$100	22.8	35.0
\$100-199	45.6	48.1
\$200-299	26.2	14.3
\$300-399	4.1	1.9
\$400-499	0.5	0.2
\$500-599	0.2	0.2
\$600-699	0.2	--
Over \$600	--	0.2
Over \$700	0.5	--

**2003 average spending:
\$173.42 per day**

**1999 average spending:
\$147.02 per day**

Average spending of **all** respondents, 2003: \$168.92 per day

Average spending of **all** respondents, 1999: \$144.26 per day

Total household income (In-Target)	2003 Percent	1999 Percent
Less than \$25,000	2.3	3.8
\$25,000 to \$39,000	5.2	10.2
\$40,000 to \$54,000	10.7	19.9
\$55,000 to \$69,000	20.2	14.5
\$70,000 to \$84,000	10.4	7.8
\$85,000 to \$99,000	7.3	3.8
More than \$100,000	5.9	4.3
Retired	18.4	11.6
Did not answer	19.7	35.8

**2003 average income:
\$69,776.56**

**1999 average income:
\$57,585.77**

Total household income (Out-of-Target)	2003 Percent	1999 Percent
Less than \$25,000	2.1	2.5
\$25,000 to \$39,000	2.1	10.9
\$40,000 to \$54,000	8.9	17.3
\$55,000 to \$69,000	12.3	11.5
\$70,000 to \$84,000	11.4	10.3
\$85,000 to \$99,000	4.3	2.5
More than \$100,000	7.7	7.8
Retired	29.4	14.8
Did not answer	21.9	37.2

**2003 average income:
\$76,387.85**

**1999 average income:
\$61,871.11**

Average annual household income of **all** respondents, 2003: \$72,682

Average annual household income of **all** respondents, 1999: \$59,664