

South Dakota Office of Tourism



2006 Intercept Study Final Report

Report Date: Dec 18, 2006

TABLE OF CONTENTS

Survey Methodology.....2

Executive Summary3

Traveler Summary4

Origin of Travelers.....6

Vacation Destinations7

Traveler Connections to South Dakota9

Length of Vacation10

Description of Travel Party13

Travel Plans to South Dakota15

Travel Information19

Spending24

SURVEY METHODOLOGY

A total of 1,146 travelers completed written surveys distributed at 13 different Interstate Information Centers in South Dakota from July 7-16, 2006.

The study includes 564 surveys from travelers residing within the Office of Tourism's peak season target market area (Colorado, Illinois, Iowa, Minnesota, Missouri, Kansas, Nebraska, North Dakota, Texas and Wisconsin). Surveys were distributed at random by the travel counselors at the Information Centers. Each participant was given a postage-paid envelope addressed to South Dakota Tourism in which to return the survey. Participants returning completed surveys by July 21, 2006, were entered into a drawing to receive a South Dakota gift package valued at \$100. South Dakotans were not interviewed for this study.

Interviews were conducted at:

Date	Location
July 7-16, 2006	Lewis and Clark Information Center near Chamberlain New Effington Information Center Salem Information Center (East) Salem Information Center (West) Spearfish Information Center Tilford Information Center (East) Tilford Information Center (West) Valley Springs Information Center Vermillion Information Center Vivian Information Center Wasta Information Center (East) Wasta Information Center (West) Wilmot Information Center

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 2005 Intercept Study, which was conducted July 10-July 19, 2005. South Dakotans were not interviewed for this study.

EXECUTIVE SUMMARY

- **Origin of travelers, in-target:** The origin of travelers remained consistent with 2005 results. In 2006, Minnesota accounted for the largest number of respondents with 135 travelers and 23.9 percent of the total In-Target respondents. One minor change from 2005 was a 5 percentage point decrease in respondents from Wisconsin, while Iowa increased 3 percentage points in 2006.
- **Origin of travelers, out-of-target:** Michigan exceeded all other out-of-target states with 57 respondents and 9.8 percent of the total out-of-target travelers. California remained consistent with 2005 results and accounted for 8 percent of the travelers. Michigan and Pennsylvania both increased percentage points in 2006.
- **Vacation destination, in-target:** In 2006, the percentage of in-target travelers who named South Dakota as their final destination dropped 3 percentage points, from 53.4 to 50.9. Respondents who selected “other” as their destination made up 49.1 percent of the travelers, a 3 percentage point increase from 2005. Black Hills, Badlands and Lakes Region was the destination for 81 percent of those who planned to stay in South Dakota for the length of their vacation. The Southeast Region was the 2nd most popular answer with 11.3 percent.
- **Vacation destination, out-of-target:** 33 percent of out-of-target travelers stated South Dakota as their vacation destination. This is a slight increase from 2005 with 31 percent planning to stay in South Dakota. Much like the in-target response, Black Hills, Badlands and Lakes comprised the far majority of travelers with 87 percent, while the Southeast region consisted of 11 percent.
- **Destinations other than South Dakota, in-target:** Comparable to 2005, 32 percent of in-target travelers who responded with a destination other than South Dakota were heading to Yellowstone (13 percent), Wyoming (10 percent), or Montana (9 percent). The next 3 most common responses were Colorado (7 percent), North Dakota (7 percent) and Minnesota (6 percent).
- **Destinations other than South Dakota, out-of-target:** Like the in-target respondents, 32 percent of these travelers said Yellowstone, Wyoming and Montana were their destinations. Minnesota was the 4th most popular response with 5 percent. These results are very similar to 2005 results. However, many travelers responded with cross country trip as their top destination in the 2005 survey.
- **Timing of travel plans:** Both in-target and out-of-target travelers responses were very comparable with this question. Over 65 percent made their travel plans between March and July. Please note that January was the most common response for in-target travelers vs. July being the most common in 2005.
- **Length of vacations:** 2006 travelers appear to be taking longer vacations than those surveyed in 2005. 68 percent of out-of-target travelers said they plan to be on vacation 12 days or more in 2006 compared to only 58 percent in 2005. The average number of vacation days for in-target consumers is 9.0 days vs. 7.7 days in 2005.

TRAVELER SUMMARY

Profile of In-Target Traveler, 2006

- 3.0 people in travel party
- Average age of adult traveler was 54.9 years. Travelers over age 19 outnumbered child travelers by 3.9 to 1
- Took a 9.0-day vacation
- Spent an average of 4.2 days in South Dakota
- Approximately 82.5% had been to South Dakota before.
- Last time here was about 5.5 years ago.
- Spent \$221.77 per day, per travel party on South Dakota portion of vacation
- Destination was South Dakota (50.9%)

Profile of In-Target Traveler, 2005

- 3.1 people in travel party
- Average age of adult traveler was 53.5 years. Travelers over age 19 outnumbered child travelers by 4.1 to 1.
- Took a 7.7-day vacation
- Spent an average of 4.2 days in South Dakota
- Approximately 82.7% had been to South Dakota before.
- Last time here was about 5.6 years ago.
- Spent \$170.69 per day, per travel party on South Dakota portion of vacation
- Destination was South Dakota (53.4%)

Profile of Out-of-Target Traveler, 2006

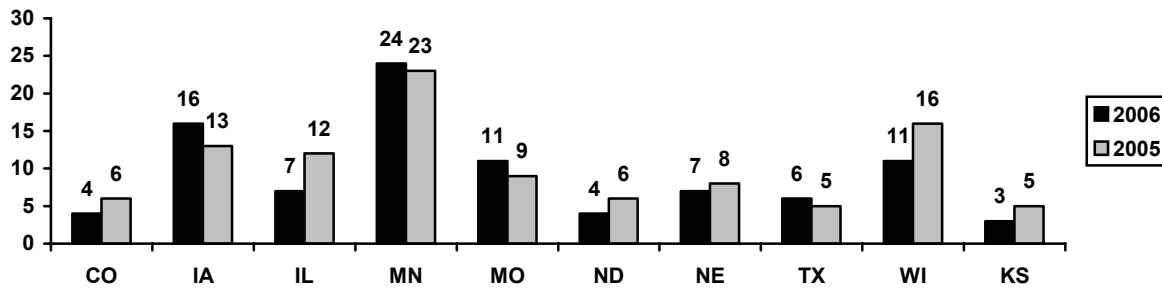
- 2.8 people in travel party
- Average age of adult traveler was 56.7 years. Travelers over age 19 outnumbered child travelers by 4.3 to 1.
- Took a 12.6-vacation
- Spent an average of 4.0 days in South Dakota
- Approximately 54.9% had been to South Dakota before.
- Last time here was about 7.0 years ago
- Spent \$209.50 per day, per travel party on South Dakota portion of vacation
- South Dakota was the final destination for 32.8 percent of the respondents. The top non-South Dakota destinations were a Yellowstone, Montana or Wyoming.

Profile of Out-of-Target Traveler, 2005

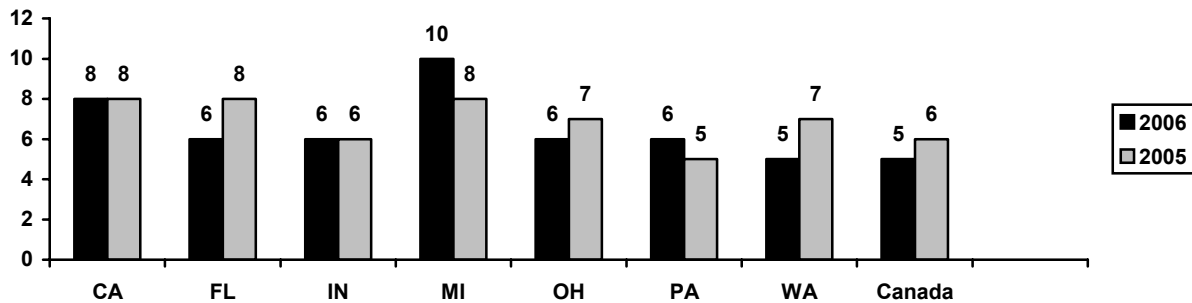
- 2.7 people in travel party
- Average age of adult traveler was 56.6 years. Travelers over age 19 outnumbered child travelers by 5.2 to 1.
- Took a 10.5-vacation
- Spent an average of 4.3 days in South Dakota
- Approximately 60.5% had been to South Dakota before.
- Last time here was about 6.8 years ago
- Spent \$166.36 per day, per travel party on South Dakota portion of vacation
- South Dakota was the final destination for 31.4 percent of the respondents. The top non-South Dakota destinations were a cross-country trip, Montana or Wyoming.

ORIGIN OF TRAVELERS, 2006

A Comparison of In-Target Travelers by percentage: 2006 vs. 2005



A Comparison of Out-of-Target Travelers by percentage: 2006 vs. 2005



- The out-of-target origins specified above comprise 52.3 percent of all out-of-target travelers surveyed in 2006. Not shown on the graph are New York, Alabama and Arizona which together made up 8.4 percent of the out-of-state target respondents for 2006. The remaining 38.1 percent included 29 states and two foreign countries.

• **DESTINATION**

Vacation Destination	In-Target		Out-of-Target	
	2006 Percent	2005 Percent	2006 Percent	2005 Percent
South Dakota	50.9	53.4	32.8	31.4
Other	49.1	46.6	67.2	68.6

Top destinations in South Dakota (In-Target)	2006 Percent	Top destinations in South Dakota (In-Target)	2005 Percent
Black Hills, Badlands and Lakes Region	81.0	Rapid City	22.0
Southeast Region	11.3	Black Hills	10.9
Great Lakes Region	7.7	Mount Rushmore	7.0
Glacier Lakes and Prairies Region	6.3	Deadwood	6.7
		Sioux Falls	5.6
		SD in General	4.7
		Keystone	4.4
		Hill City	4.1
		Spearfish	3.5
		Custer	3.2
		Watertown	2.1
		Badlands	2.1
		Pierre	1.8
		Hot Springs	1.5

*2006 Survey asked for the respondents destination by Region vs. specific location or attraction

Top destinations in South Dakota (Out-of-Target)	2006 Percent	Top destinations in South Dakota (Out-of-Target)	2005 Percent
Black Hills, Badlands and Lakes Region	87.2	Rapid City	21.7
Southeast Region	11.2	Mt. Rushmore	13.7
Great Lakes Region	8.5	Black Hills	10.6
Glacier Lakes and Prairies Region	5.3	SD in general	7.1
		Sioux Falls	7.1
		Deadwood	5.8
		Badlands	5.3
		Spearfish	4.9
		Custer	4.0
		Mitchell	3.5
		Hill City	3.1
		Crazy Horse	2.7

*2006 Survey asked for the respondents destination by Region vs. specific location or attraction

Destinations other than South Dakota (In-Target)	2006 Percent	Destinations other than South Dakota (In-Target)	2005 Percent
Yellowstone	13.1	Montana	12.5
Wyoming	10.2	Yellowstone	10.8
Montana	8.8	Wyoming	10.8
Colorado	7.3	Minnesota	9.6
North Dakota	6.9	Colorado	8.3
Minnesota	6.2	North Dakota	7.9
Washington	4.4	Glacier National Park	5.8
Glacier National Park	4.0	Washington	4.6
California	3.3	Canada	4.2
Oregon	2.9	Iowa	3.8
Idaho	2.2	Oregon	2.1
Canada	1.8	Texas	2.1
Missouri	1.8	Nebraska	1.7
Wisconsin	1.5	California	1.7
Nebraska	1.5	Tetons	1.7
Texas	1.1	Utah	1.3

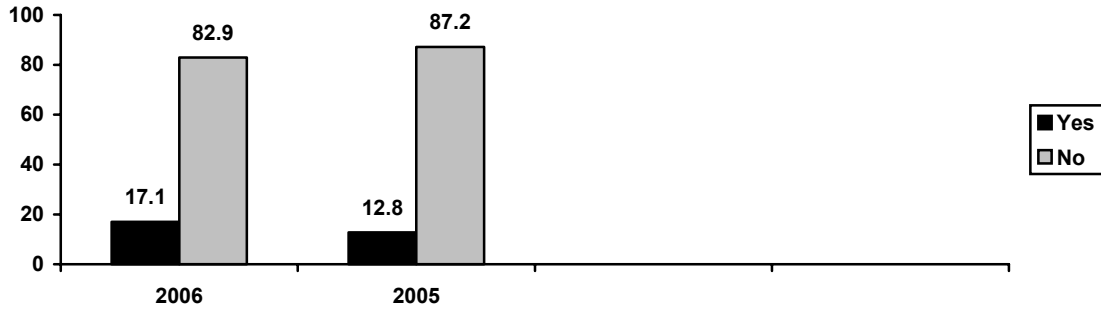
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Destinations other than South Dakota (Out-of-Target)	2006 Percent	Destinations other than South Dakota (Out-of-Target)	2005 Percent
Yellowstone	11.2	Cross country trip	10.1
Montana	9.1	Montana	8.6
Wyoming	6.8	Wyoming	8.1
Minnesota	4.7	Yellowstone	7.6
California	3.6	Washington	7.3
Washington	3.6	North Dakota	5.8
Oregon	3.1	Colorado	5.8
Canada	3.1	Minnesota	5.8
Colorado	2.9	California	5.3
Alaska	2.9	Canada	5.3
Wisconsin	2.1	Oregon	2.8
Glacier National Park	1.6	Iowa	2.8
Iowa	1.6	Grand Canyon	2.5
Idaho	1.3	Nebraska	2.3
North Dakota	1.0	Michigan	2.3
Missouri	1.0	Alaska	2.3

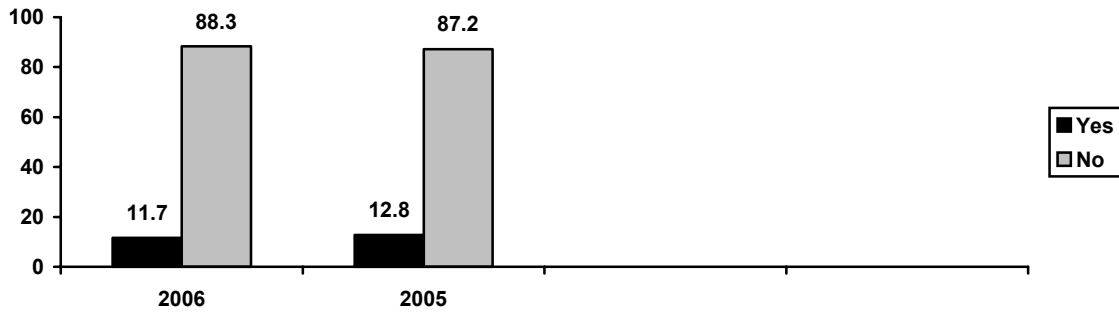
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TRAVELER CONNECTIONS TO SOUTH DAKOTA

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



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

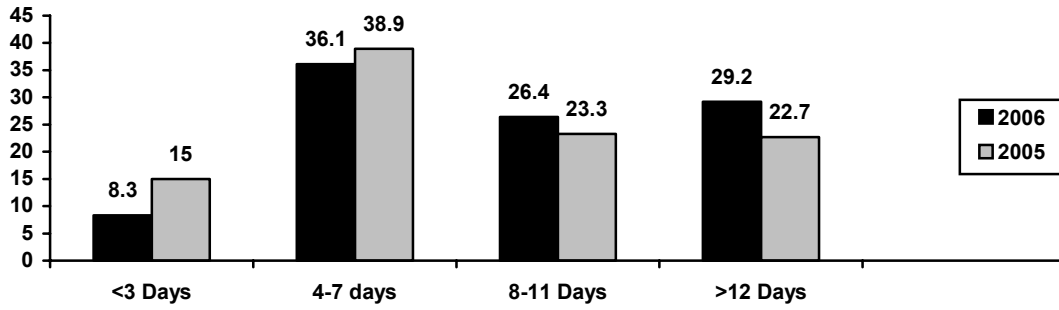


LENGTH OF VACATION

Total vacation days (In-Target)	2006 Percent	2005 Percent	Total vacation days (Out-of-Target)	2006 Percent	2005 Percent
3 days or less	8.3	15.0	3 days or less	1.7	7.7
4-7 days	36.1	38.9	4-7 days	12.2	16.8
8-11 days	26.4	23.3	8-11 days	18.0	17.8
12 or more days	29.2	22.7	12 or more days	68.0	57.7
Average vacation days:	9.0 days	7.7 days	Average vacation days:	12.6 days	10.5 days

Total vacation days in South Dakota (In-Target)	2006 Percent	2005 Percent	Total vacation days in South Dakota (Out-of-Target)	2006 Percent	2005 Percent
1	12.1	12.5	1	8.6	9.5
2	21.8	18.3	2	22.9	22.5
3	14.8	16.6	3	22.9	18.8
4	13.4	15.0	4	15.0	15.3
5	12.0	13.7	5	9.5	8.9
6	8.2	7.3	6	5.7	5.9
7	7.5	6.4	7	5.2	5.3
8	3.6	3.7	8	2.6	3.3
9	1.1	1.7	9	0.9	2.8
10	1.4	1.0	10	1.4	1.8
11	0.4	1.2	11	0.7	1.6
12 or more	3.8	2.7	12 or more	4.8	4.3
Average days in S.D.:	4.2 days	4.2 days	Average days in S.D.:	4.0 days	4.3 days

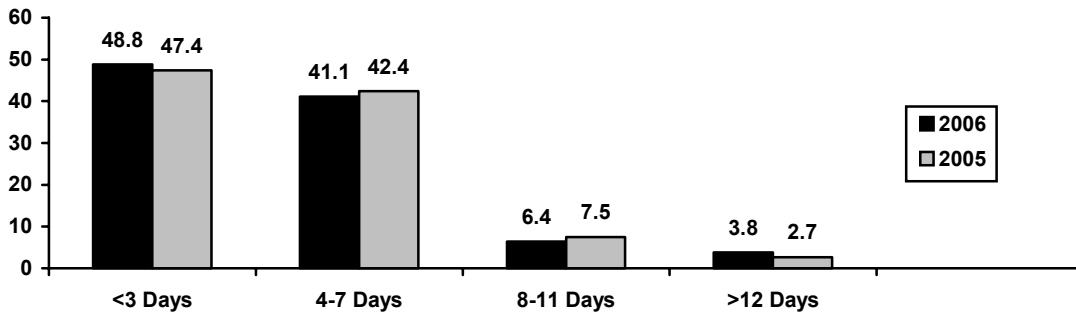
Total vacation days (In-Target) by percentage: 2006 vs. 2005



2006 average: 9.0 days

2005 average: 7.7 days

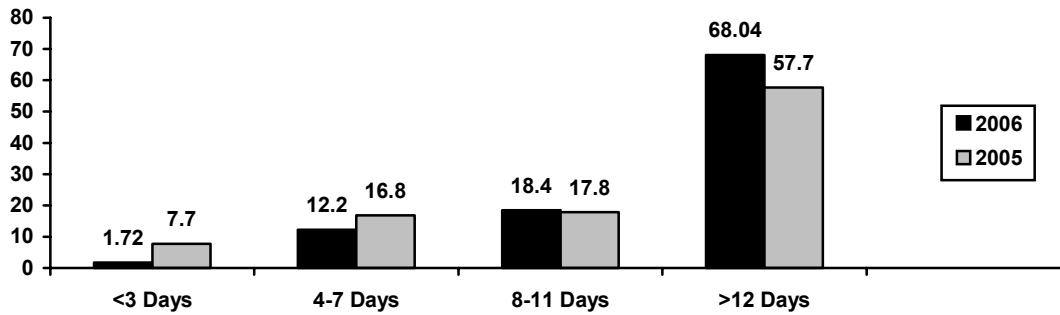
Total vacation days in South Dakota (In-Target) by percentage: 2006 vs. 2005



2006 average: 4.2 days

2005 average: 4.2 days

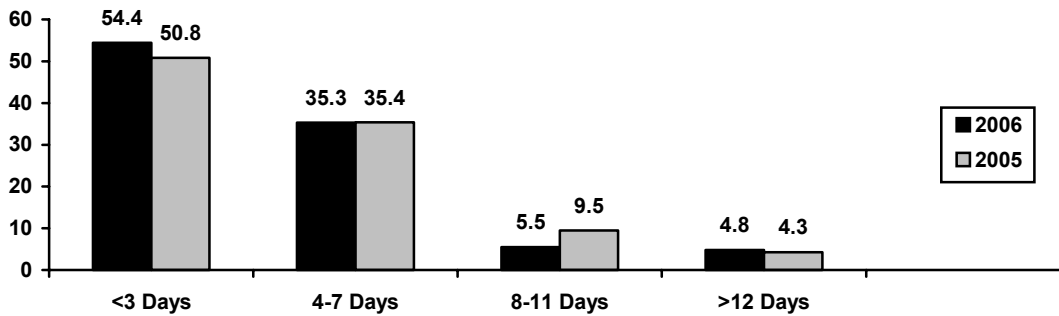
Total vacation days (Out-of-Target) by percentage: 2006 vs. 2005



2006 Average: 12.6 days

2005 Average: 10.5 days

Total vacation days in South Dakota (Out-of-Target) by percentage: 2006 vs. 2005



2006 Average: 4.0 days

2005 Average: 4.3 days

DESCRIPTION OF TRAVEL PARTY

Size of travel party (In-Target)	2006 Percent	Size of travel party (In-Target)	2005 Percent
1	4.8	1	6.2
2	52.0	2	46.8
3	12.1	3	12.9
4	16.0	4	17.3
5	6.7	5	8.3
6	4.6	6	3.9
7	1.4	7	0.8
8	0.7	8 or more*	3.9
9	0.5		
10+	1.2		

Average #/party: 3.0 people

Average #/party: 3.1 people

Size of travel party (Out-of-Target)	2006 Percent	Size of travel party (Out-of-Target)	2005 Percent
1	4.5	1	7.6
2	58.8	2	56.4
3	11.7	3	12.0
4	14.6	4	15.0
5	6.3	5	5.1
6	1.0	6	2.1
7	1.0	7	1.2
8	0.5	8 or more*	0.7
9	0.7		
10+	0.9		

Average #/party: 2.8 people

Average #/party: 2.7 people

* In 2005 8 or more people was the highest allowed answer.

Age of adults in travel party (In-Target)	2006 Percent	Age of adults in travel party (In-Target)	2005 Percent
19-24	2.3	19-24	5.3
25-34	5.5	25-34	4.9
35-54	37.6	35-54	39.4
55-64	27.5	55-64	24.8
65+	27.2	65+	25.7
Average age:	54.9 years	Average age:	53.5 years

Age of adults in travel party (Out-of-Target)	2006 Percent	Age of adults in travel party (Out-of-Target)	2005 Percent
19-24	2.8	19-24	3.0
25-34	4.2	25-34	3.8
35-54	30.3	35-54	31.2
55-64	31.8	55-64	30.7
65+	31.0	65+	31.2
Average age:	56.7 years	Average age:	56.6 years

Gender of adults in travel party (In-Target)	2006 Percent	Gender of adults in travel party (In-Target)	2005 Percent
Male	47.7	Male	46.5
Female	52.3	Female	53.5

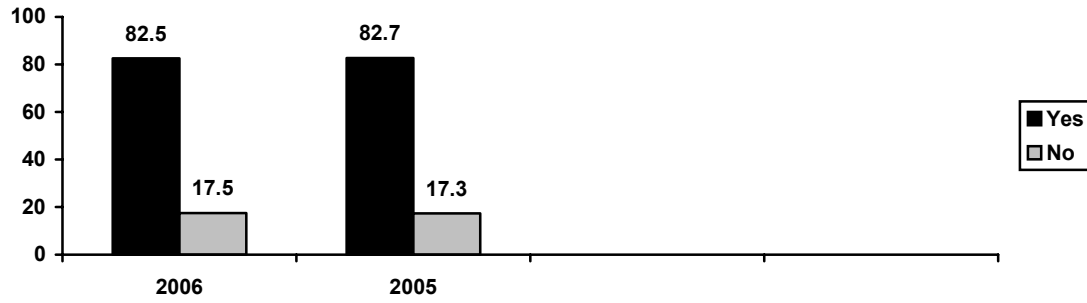
Gender of adults in travel party (Out-of-Target)	2006 Percent	Gender of adults in travel party (Out-of-Target)	2005 Percent
Male	46.7	Male	47.6
Female	53.3	Female	52.4

TRAVEL PLANS TO SOUTH DAKOTA

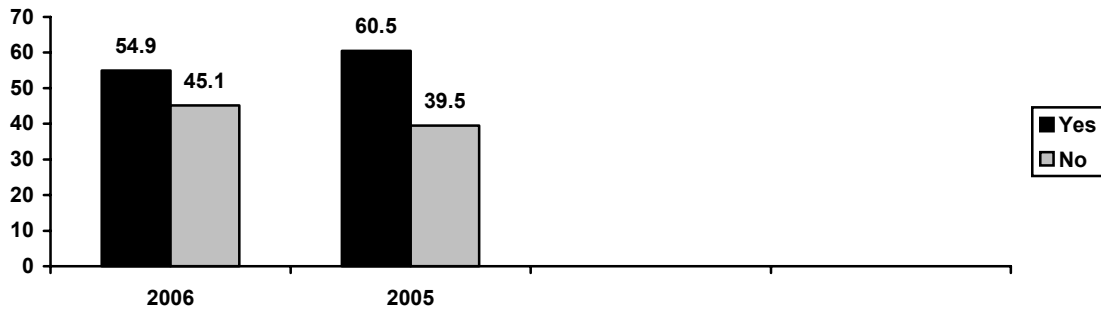
When did you make the decision to come to/ through South Dakota? (In-Target)	2006 Percent	When did you make the decision to come to/ through South Dakota? (In-Target)	2005 Percent
January	17.5	January	11.9
February	7.7	February	11.2
March	13.9	March	8.3
April	9.7	April	9.2
May	12.2	May	14.3
June	16.6	June	15.8
July	16.2	July	23.1
August	0.9	August	0.6
September	0.4	September	1.2
October	0.7	October	1.2
November	1.8	November	1.9
December	2.4	December	1.3

When did you make the decision to come to/ through South Dakota? (Out-of-Target)	2006 Percent	When did you make the decision to come to/ through South Dakota? (Out-of-Target)	2005 Percent
January	16.6	January	18.9
February	7.6	February	7.7
March	11.9	March	11.2
April	11.2	April	11.8
May	10.6	May	11.0
June	17.2	June	11.2
July	15.9	July	20.6
August	1.4	August	2.0
September	1.4	September	0.8
October	1.8	October	1.8
November	1.9	November	1.3
December	2.5	December	1.6

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)

	2006 Percent	2005 Percent
Earlier this year	16.3	15.0
1 year ago	24.8	20.6
2 years ago	10.4	6.4
3 years ago	6.8	4.0
4 years ago	4.4	3.7
5 years ago	3.8	6.0
6 years ago	2.3	0.8
7 years ago	1.9	1.0
8 years ago	1.9	1.2
9 years ago	1.1	1.2
10+ years ago	26.3	22.9
Average:	5.5 years ago	5.6 years ago

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

	2006 Percent	2005 Percent
Earlier this year	6.2	5.6
1 year ago	18.7	11.2
2 years ago	10.9	5.8
3 years ago	9.0	3.9
4 years ago	4.7	4.6
5 years ago	5.0	2.6
6 years ago	3.7	1.2
7 years ago	2.8	1.6
8 years ago	3.4	2.0
9 years ago	2.5	0.7
10+ years ago	33.0	21.4
Average:	7.0 years ago	6.8 years ago

What in particular prompted you to consider South Dakota? (In-Target)	2006 Percent	What in particular prompted you to consider South Dakota? (In-Target)	2005 Percent
Specific attraction	40.2	Specific attraction	38.3
Family/friends	19.7	Family/friends	21.0
Other	10.3*	Other	24.7*
Passing Through	9.9	NA	-
Specific Event	7.3	Specific event	8.7
Close to home	6.2	Close to home	3.1
Advertisement TV	1.9	Advertisement TV	0.8
Advertisement Magazine	1.7	Advertisement Magazine	0.4
Advertisement Internet/E-mail	1.3	Advertisement Internet/E-mail	0.6
Advertisement Newspaper	1.0	Advertisement Newspaper	1.7
Advertisement Travel/Outdoor Show	0.5	Advertisement Travel/Outdoor Show	0.8

(multiple answers allowed)

* Examples of “other” reasons in 2006 included: History, wildlife, painting, education, swimming, museums, rafting, scuba diving, horseback riding and fine arts.

What in particular prompted you to consider South Dakota? (Out-of-Target)	2006 Percent	What in particular prompted you to consider South Dakota? (Out-of-Target)	2005 Percent
Specific attraction	51.7	Specific attraction	46.2
Family/Friends	17.7	Family/Friends	20.9
Other*	11.3	Other*	22.5
Specific Event	5.0	Specific Event	6.6
Close to home	1.2	Close to home	1.0
Advertisement Travel/Outdoor Show	1.8	Advertisement Travel/Outdoor Show	0.8
Advertisement Magazine	3.2	Advertisement Magazine	0.7
Advertisement Internet/E-mail	1.2	Advertisement Internet/E-mail	0.5
Advertisement TV	1.5	Advertisement TV	0.3

(multiple answers allowed)

*See above 2005 other category for examples.

TRAVEL INFORMATION

While on your vacation, are you using a South Dakota Vacation Guide? (In-Target)*

	2006 Percent	2005 Percent
Yes	59.1	61.1
No	40.9	38.9

If yes, when did you receive the vacation guide? (In -Target)

	2006 Percent	2005 Percent
Before coming to South Dakota	46.3	39.1
After Arriving to South Dakota	53.7	60.9

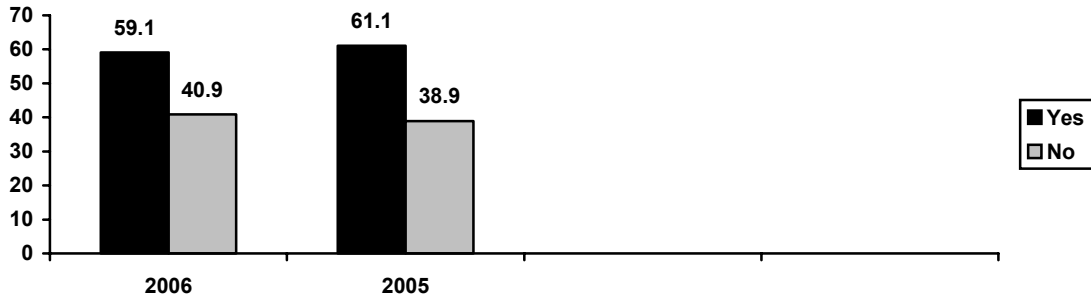
While on your vacation, are you using a South Dakota Vacation Guide? (Out-of-Target)

	2006 Percent	2005 Percent
Yes	57.8	60.7
No	42.2	39.3

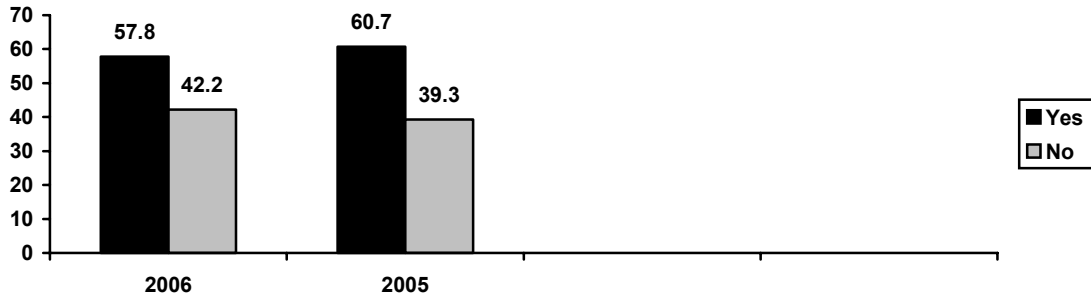
If yes, when did you receive the vacation guide? (Out-of-Target)

	2006 Percent	2005 Percent
Before coming to South Dakota	33.5	40.8
After Arriving to South Dakota	66.5	59.2

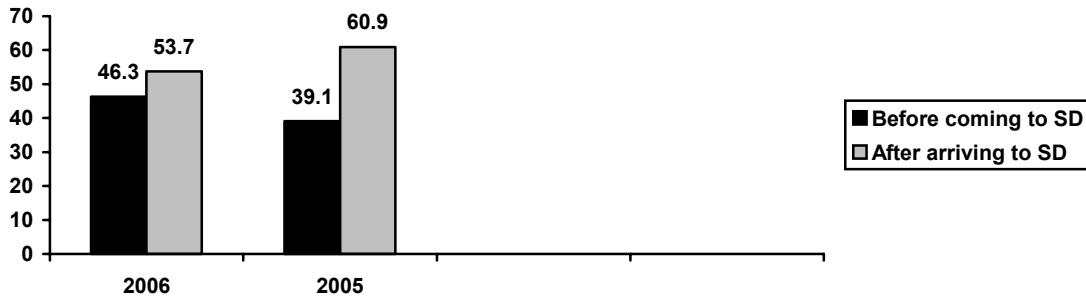
While on your vacation, are you using a South Dakota Vacation Guide? (In-Target)



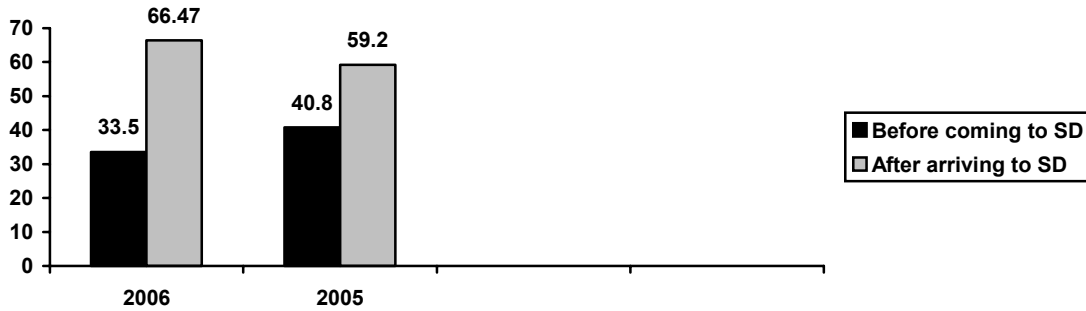
While on your vacation, are you using a South Dakota Vacation Guide? (Out-of-Target)



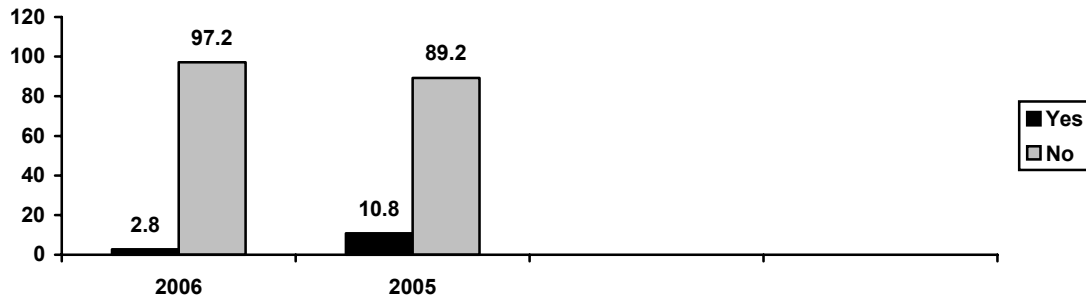
When did you receive the vacation guide? (In -Target)



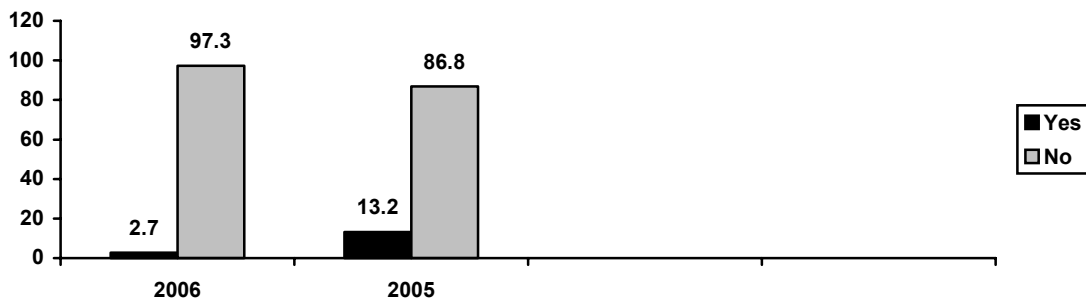
When did you receive the vacation guide? (Out-of-Target)



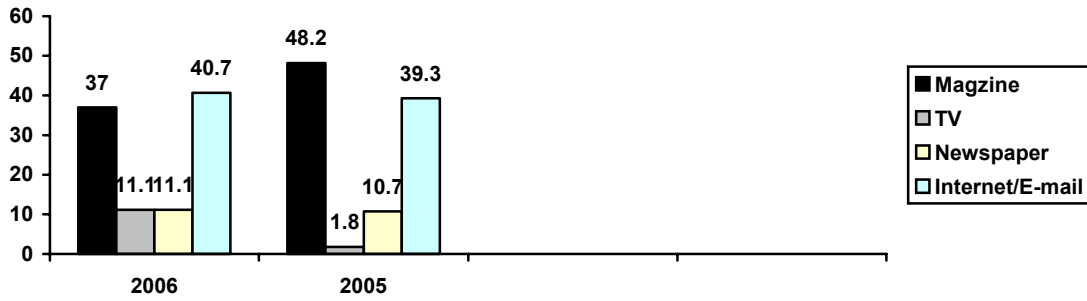
Are you using a South Dakota vacation package that combines lodging and activities on your trip? (In-Target)



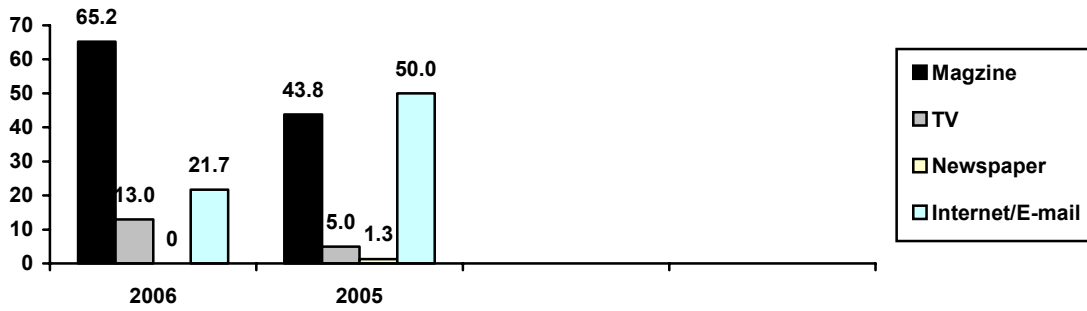
Are you using a South Dakota vacation package that combines lodging and activities on your trip? (Out-of-Target)



Where did you find out about the package? (In-Target)



Where did you find out about the package? (Out-of-Target)



SPENDING

Total spending per day for entire travel party (In-Target)	2006 Percent	2005 Percent
Less than \$100	15.0	37.4
\$100-199	42.1	35.4
\$200-299	23.4	16.2
\$300-399	7.3	6.8
\$400-499	3.6	2.5
\$500-599	1.4	1.2
\$600-699	0.9	0.4
Over \$700	4.1	0.0
Average spending:	\$221.77 per day	\$170.69 per day

Total spending per day for entire travel party (Out-of-Target)	2006 Percent	2005 Percent
Less than \$100	12.3	34.7
\$100-199	45.1	38.5
\$200-299	26.4	19.4
\$300-399	6.7	4.5
\$400-499	2.7	1.7
\$500-599	1.7	1.0
\$600-699	0.5	0.2
Over \$700	2.1	0.0
Average spending:	\$209.50 per day	\$166.36 per day

Average spending of **all** respondents, 2006: \$215.52 per day

Average spending of **all** respondents, 2005: \$168.53 per day