



2016 Tourism Advertising Evaluation and Image Study

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Background



- ◉ Longwoods International was engaged by Explore South Dakota Tourism to undertake an evaluation of their spring/summer 2016 tourism advertising campaign.
- ◉ The campaign employed TV, Print, Digital, Out-of-Home and Social Media
- ◉ The ads were designed to:
 - ❖ *Promote leisure travel to South Dakota*
- ◉ South Dakota's advertising markets included:
 - ❖ *Minnesota, Wisconsin, Illinois, Missouri, Iowa, Colorado, Nebraska, North Dakota, Montana and Wyoming*
- ◉ Campaign spending totaled \$3.3 million.

Research Objectives



- ◉ The purpose of this research is to provide:
 - ◉ *fundamental strategic insights about the image of South Dakota and its key competitors with respect to key destination choice factors;*
 - ◉ *an evaluation of the spring/summer 2016 tourism advertising campaign in terms of:*
 - ❖ *top line measures:*
 - ◉ *awareness of the advertising*
 - ◉ *impact on South Dakota's image as a travel destination*
 - ❖ *the bottom line return on South Dakota's investment in the campaign in terms of:*
 - ◉ *incremental travel to South Dakota*
 - ◉ *incremental traveler spending in South Dakota*
 - ◉ *incremental state and local taxes*

Research Method



- ⦿ The study was conducted among a representative sample of adult travelers (18+) residing in South Dakota's advertising markets.
 - ⦿ *'Travelers' means respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years.*
- ⦿ The survey was conducted via a major online consumer panel which is demographically balanced to represent the population in the markets surveyed.
 - ⦿ 1,419 individuals responded to the research

Research Method (Cont'd)



- ◉ The questionnaire addressed three key areas:
 - ◉ ***South Dakota's Image as a Travel Destination***
 - *respondents rated South Dakota and selected competitive destinations across an extensive list of characteristics or destination attributes.*
 - ◉ ***Travel to South Dakota***
 - *respondents reported the number of day and overnight trips they took to South Dakota during and shortly after the advertising campaign.*
 - ◉ ***Advertising awareness***
 - *actual creative from the 2016 campaign was exposed and respondents reported recall of each.*
 - ◉ *we use this forced exposure approach to ensure that we are measuring the state-sponsored advertising only – not that of South Dakota's attractions and accommodation facilities.*

Research Method (Cont'd)



- ◉ **ROI** calculation:

- ◉ *the **Longwoods R.O.EYE™** method quantifies the relationship between awareness of campaign elements and trip taking.*
- ◉ *a baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.*
- ◉ *using the principles and techniques of experimental design, we control for the effects of internal and external factors that could otherwise influence the result.*

Image Study Summary

Travel Motivators



- ◉ In the survey, respondents were asked to evaluate several destinations overall and on a series of detailed image attributes.
- ◉ Through statistical analysis, we have derived the relative importance of each attribute in determining people's overall interest in the destinations.
- ◉ Then, in order to better communicate the results, the data have been grouped into 10 broader categories, or travel motivators, and ranked from more important to less important.

Travel Motivators (Cont'd)



- ◉ The more important a travel motivator is, the more important it should be for a destination to communicate that message about itself, taking into consideration its ability to deliver on the promise with its product.
- ◉ Within each travel motivator category, the image attributes that make up that category are also presented in their order of importance.
- ◉ When evaluating South Dakota's image and product delivery, and those of the competitive set, it is critical to keep the relative importance of each attribute in mind.

Travel Motivators (Cont'd)



- ◉ For travelers, the top motivators for getting on the destination wish list are **exciting**, followed by **adult vacation**, **uniqueness** and having a **family atmosphere**:
 - ◉ *the notion of **excitement** comes from being seen as fun, with a sense of adventure and a must-see destination*
 - ◉ ***adult vacation**, the perceived suitability for adults, is important because they are paying for the trip*
 - ◉ ***uniqueness**, offering a unique vacation experience*
 - ◉ ***family atmosphere** refers to a destination's perceived appeal for kids and families*

Travel Motivators (Cont'd)



- ⊙ Several factors are of moderate importance individually; but they include some of the key rational features that bring to life the emotional excitement that attracts people to a destination:
 - ⊙ ***popularity** as a tourist destination in general*
 - ⊙ *a **worry-free** environment, because being perceived as relaxed and friendly is important*
 - ⊙ *good **sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery*

Travel Motivators (Cont'd)



- ◉ Relatively low on the priority list are:
 - ◉ *the opportunities for **entertainment**, including theater and the arts, live music, and casinos*
 - ◉ ***affordability** refers to the costs associated with getting to and staying at a destination:*
 - ◉ *although relatively unimportant at the wish list stage, cost usually rises in importance the closer one gets to closing the sale*
 - ◉ *opportunities for **sports and recreation***

South Dakota's Image



- ◉ South Dakota's Competitive Set includes North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, and Colorado
- ◉ South Dakota's image strengths versus these competitors as a group are:
 - ◉ *Most aspects of sightseeing— well-known landmarks, Native American Culture, authentic historical sites, noted for its history, excellent national/state parks, great place for a Classic American Road trip, truly unique scenery, and different cultures/ways of life*
 - ◉ *Must-see destination*

South Dakota's Image (Cont'd)



- ◉ Nonetheless, travelers perceive some disadvantages to visiting South Dakota relative to the competition:
 - ◉ *Most aspects of water-related outdoor adventure – great for boating/water sports, excellent canoeing/kayaking/paddleboarding, fishing, as well as snowmobiling*
 - ◉ *Urban experiences such as interesting food and drink options, great for theater and the arts, and great live music*
 - ◉ *Not too far away for a vacation*

South Dakota's Image vs North Dakota



- ◉ A more detailed analysis of South Dakota's image vs. the image of the individual competitive states evaluated in this study reveals the following:
- ◉ **North Dakota** – South Dakota edges out North Dakota in all fourteen hot button areas: well-known destination, popular with vacationers, great place for a Classic American Road trip, must-see destination, unique scenery and vacation experience, vacation there is a real adventure, lots to see and do, fun place to vacation, children would enjoy, exciting place, excellent vacation value, good for adult vacation, and good place to relax.
- ◉ South Dakota has no statistically significant weaknesses relative to North Dakota

South Dakota's Image vs Minnesota



- ◉ **Minnesota**— South Dakota's image strengths include the key areas of unique scenery, great place for a Classic American Road trip, providing a vacation with real adventure, must-see and well known destination, popular with vacationers, unique vacation experience, and excellent vacation value.
- ◉ Minnesota's image strengths relative to South Dakota are many aspects of water-related outdoor adventure including boating/water sports, excellent fishing, canoeing/kayaking/paddleboarding, and snowmobiling. Strengths also include urban amenities such as theater and the arts, interesting food and drink options, great live music and exciting casinos, as well as not being too far away for a vacation.

South Dakota's Image vs Wyoming



- ◉ **Wyoming**— South Dakota's advantages over Wyoming include eight hot buttons: well-known destination, popular with vacationers, a fun place for vacation, lots to see and do, must-see destination, great place for a Classic American Road trip, good for adult vacation and children would enjoy. South Dakota's top strengths versus Wyoming also include well-known landmarks, noted for its history, authentic historical sites, and Native American Cultural.
- ◉ Wyoming's advantages over South Dakota include the less critical areas of great wilderness areas and excellent hunting.

South Dakota's Image vs Wisconsin



- ◉ **Wisconsin** – Relative to Wisconsin, South Dakota's perceived advantages include the key areas of must-see destination, truly unique scenery, vacation there is a real adventure, and great place for a Classic American Road trip. South Dakota also has an advantage in well-known landmarks, Native American Culture, authentic historical sites, noted for its history, and excellent national/state parks.
- ◉ Wisconsin's strengths in comparison include being a place children would enjoy and having lots to see and do. In addition, Wisconsin is recognized for many aspects of water-related outdoor adventure including great for boating/water sports, canoeing/kayaking/paddleboarding, fishing and snowmobiling.

South Dakota's Image vs Missouri



- ◉ **Missouri** – Relative to Missouri, South Dakota's perceived advantages include eight of the hot buttons: truly unique scenery, great place for a Classic American Road trip, vacation there is a real adventure, must-see destination, unique vacation experience, popular with vacationers, an exciting place, and good place to relax. South Dakota also gets the nod for Native American Culture, well-known landmarks, authentic historical sites and most outdoor aspects including national/state parks, snowmobiling, wilderness areas, hiking, beautiful scenery, hunting, camping, and viewing wildlife/birds.
- ◉ Missouri's strengths compared to South Dakota include great for boating/water sports, not too far away for a vacation, and the urban aspects of great live music, theater and the arts, and interesting food and drink options.

South Dakota's Image vs Colorado



- ◉ **Colorado** – Relative to Colorado, South Dakota's perceived advantages include Native American Culture, affordable accommodations, authentic historical sites, and well-known landmarks.
- ◉ Colorado's strengths in comparison include thirteen of the hot buttons: a fun place for vacation, lots to see and do, popular with vacationers, an exciting place, good for adult vacation, well-known destination, vacation there is a real adventure, must-see destination, truly unique scenery, children would enjoy, unique vacation experience, good place to relax, and great place for a Classic American Road trip.

South Dakota's Product Delivery



- ◉ The image ratings we just discussed looked at perceptions of South Dakota and the competition among the broad population of potential travelers in South Dakota's target markets. Within that broad population are some people who have visited South Dakota in the recent past, i.e. who have experienced South Dakota's product, and some who haven't.
- ◉ The analysis that follows examines recent visitors' image of South Dakota based on recent experience ("product delivery") compared to the image ratings of those who have never actually visited, i.e., whose perceptions are based on "pure image".

South Dakota's Product Delivery



- This is essentially the difference between the expectations of those who have not been to South Dakota vs. the experiences of those who have. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who don't know how wonderful South Dakota is.

South Dakota's Product Delivery



- ◉ In this survey people who have visited South Dakota in the past two years gave South Dakota substantially higher ratings for every one of the many attributes on which they evaluated the state than people who had never visited.
- ◉ In other words, the first time visitor is very pleasantly surprised by what they experience in South Dakota.
- ◉ The difference is in many cases so large that it is clear that South Dakota's product delivers, consistently exceeding visitor expectations. The conclusion one could draw is that with such a good product, South Dakota has more of an awareness problem than a product problem.

South Dakota's Product Delivery



- ◉ The greatest differences in “perception vs. reality” are:
 - ◉ *The all-important “hot button” attributes related to being a well-known destination, providing an excellent vacation value, being a great place for a Classic American Road trip, a unique, must-see destination, a place with lots to see and do for both adults and children.*
 - ◉ *South Dakota's historical and cultural offerings: noted for its history, well-known landmarks, authentic historical sites, and Native American Culture.*
 - ◉ *The outdoor activities such as national/state parks, hunting, cycling/off-road biking, camping, and beautiful scenery.*

Travel Motivators & Hot Buttons

Travel Motivators

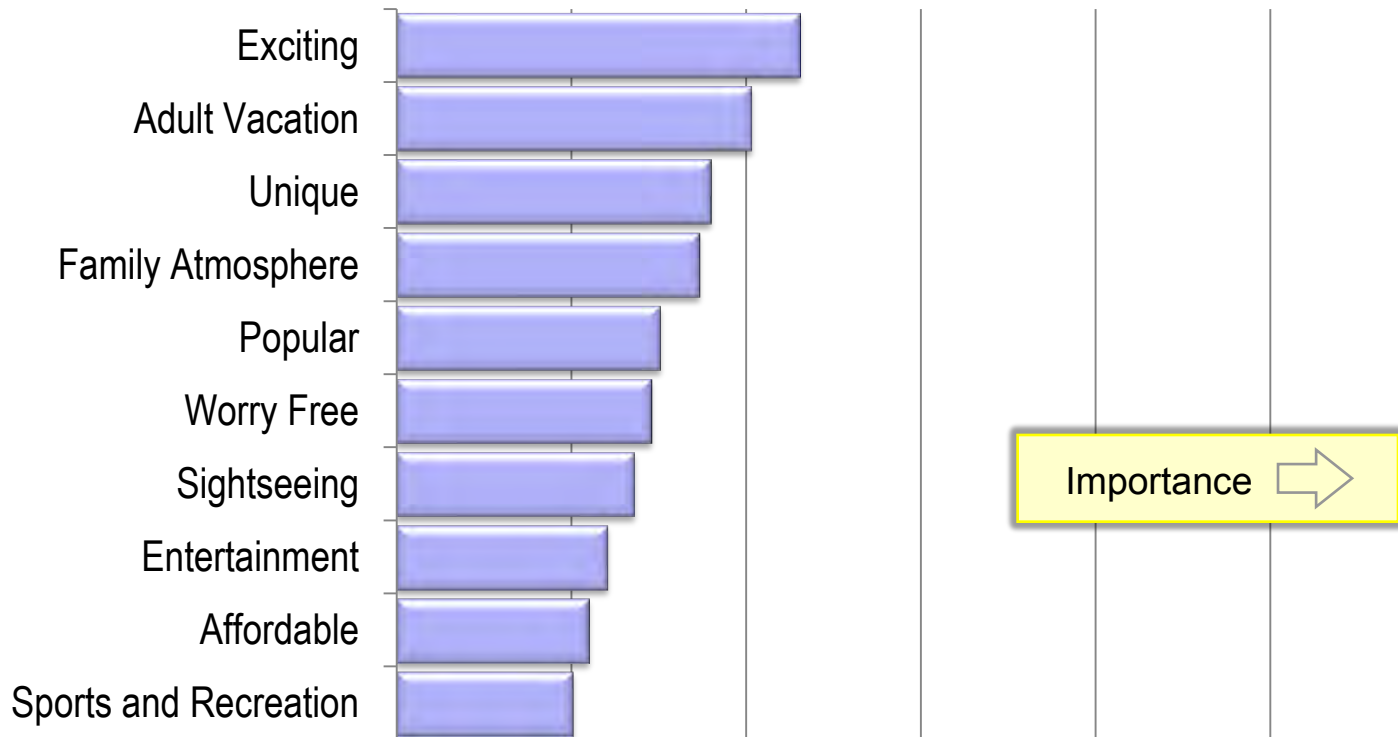


- ◉ In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate selected states across a robust list of **attributes** or characteristics.
- ◉ Statistical correlations are then used to establish the degree of association between each attribute and the overall rating, “A place I would really enjoy visiting.”
 - ◉ *A high correlation reveals an attribute to be an important motivator. The attributes with the highest correlations are referred to as ‘Hot Buttons’.*
 - ◉ *A lower correlation reveals an attribute to be of lesser importance.*
- ◉ The Travel Motivating factors are calculations that reflect the aggregated importance across attributes related by subject.

Travel Motivators



Base: Residents of South Dakota's Regional Advertising Markets



Relative Importance*

Hot Buttons



Base: Residents of South Dakota's Regional Advertising Markets

Top 14 Hot Buttons

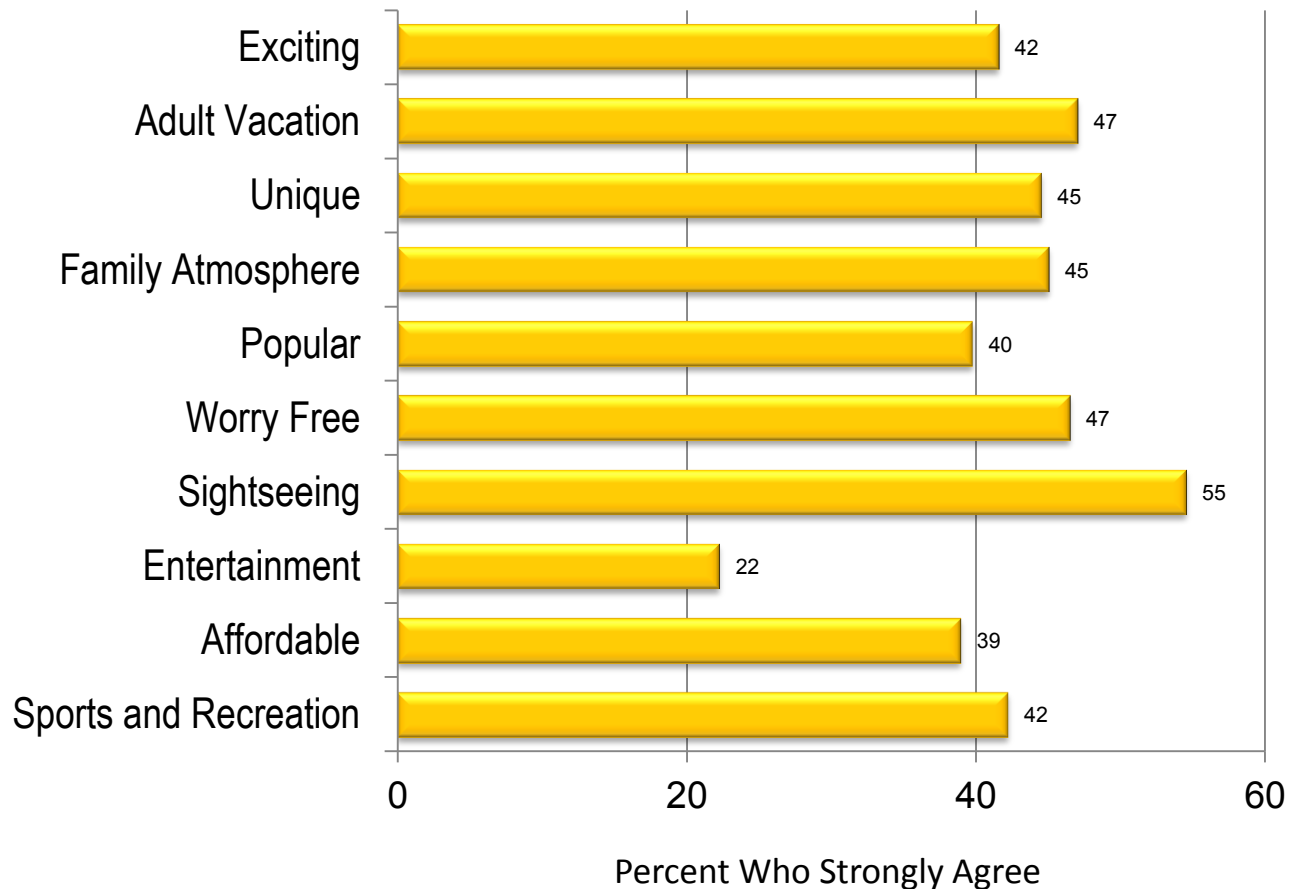
A fun place for a vacation	Popular with vacationers
An exciting place	Unique vacation experience
Must-see destination	Truly unique scenery
Lots to see and do	Excellent vacation value
Good for an adult vacation	Great place for a Classic American Road trip
Vacation there is a real adventure	Well-known destination
Children would enjoy	Good place to relax

South Dakota's Image vs. Competitors

South Dakota's Overall Image



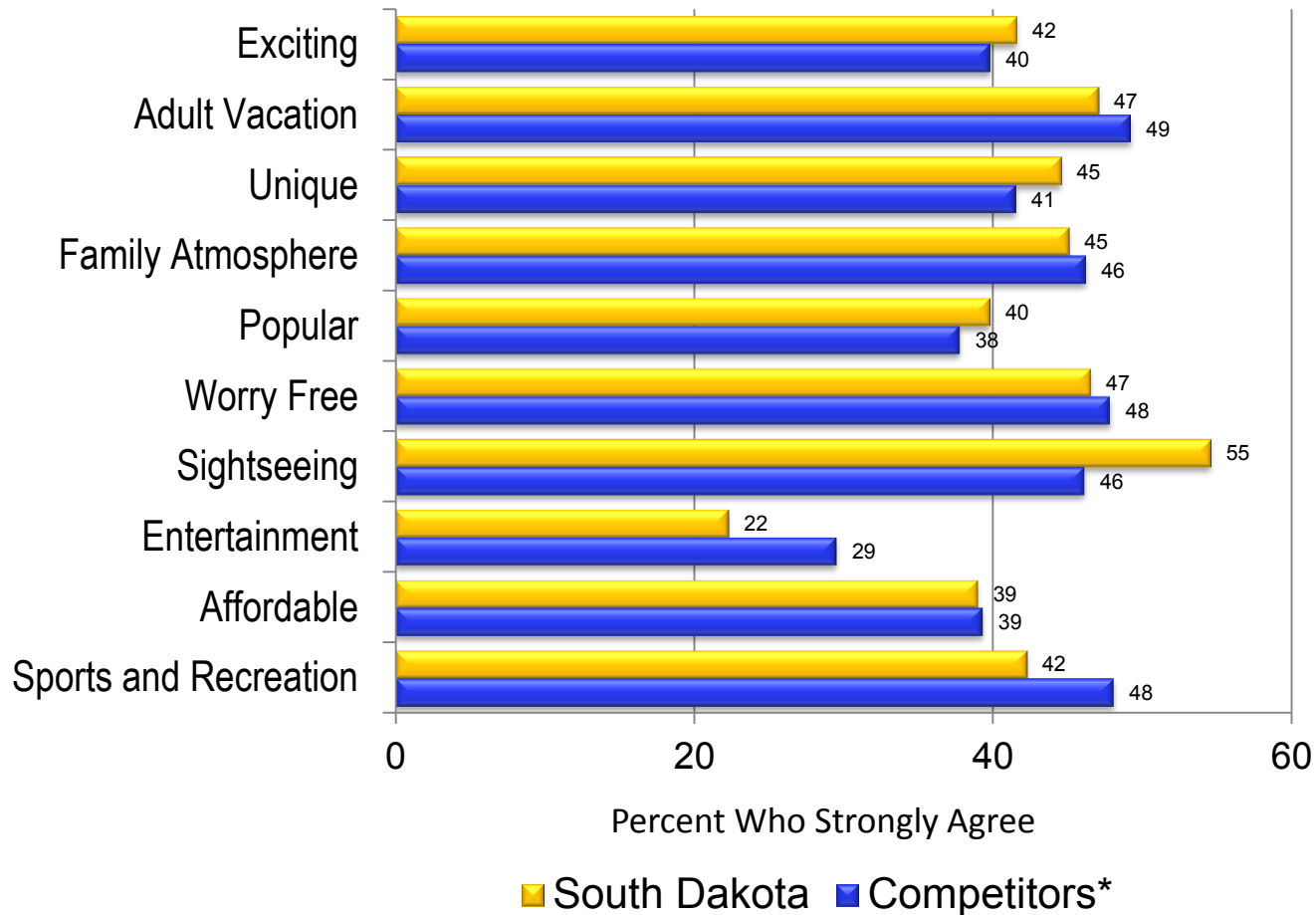
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Overall Image vs. Competitors



Base: Residents of South Dakota's Regional Advertising Markets

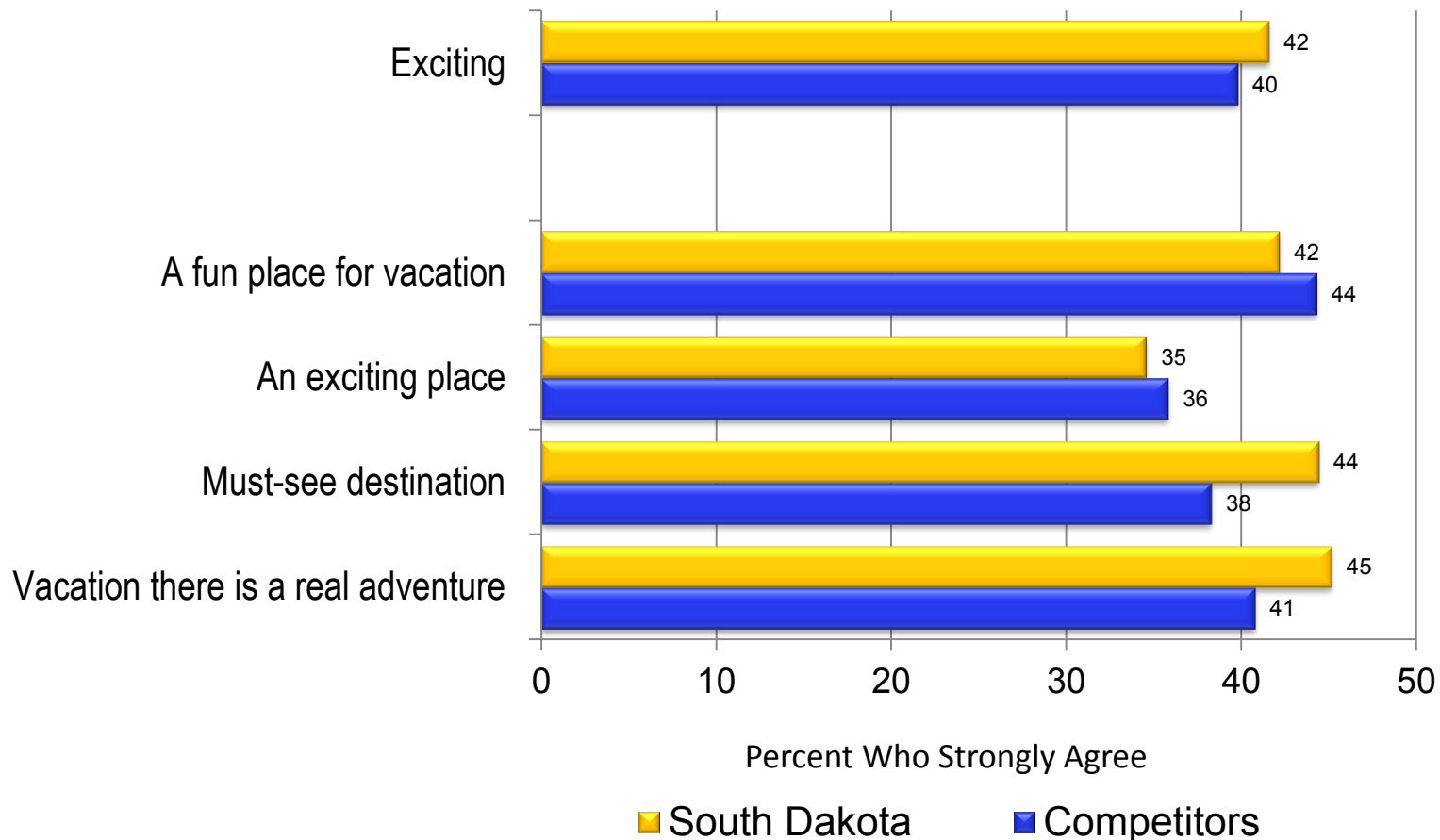


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Exciting



Base: Residents of South Dakota's Regional Advertising Markets

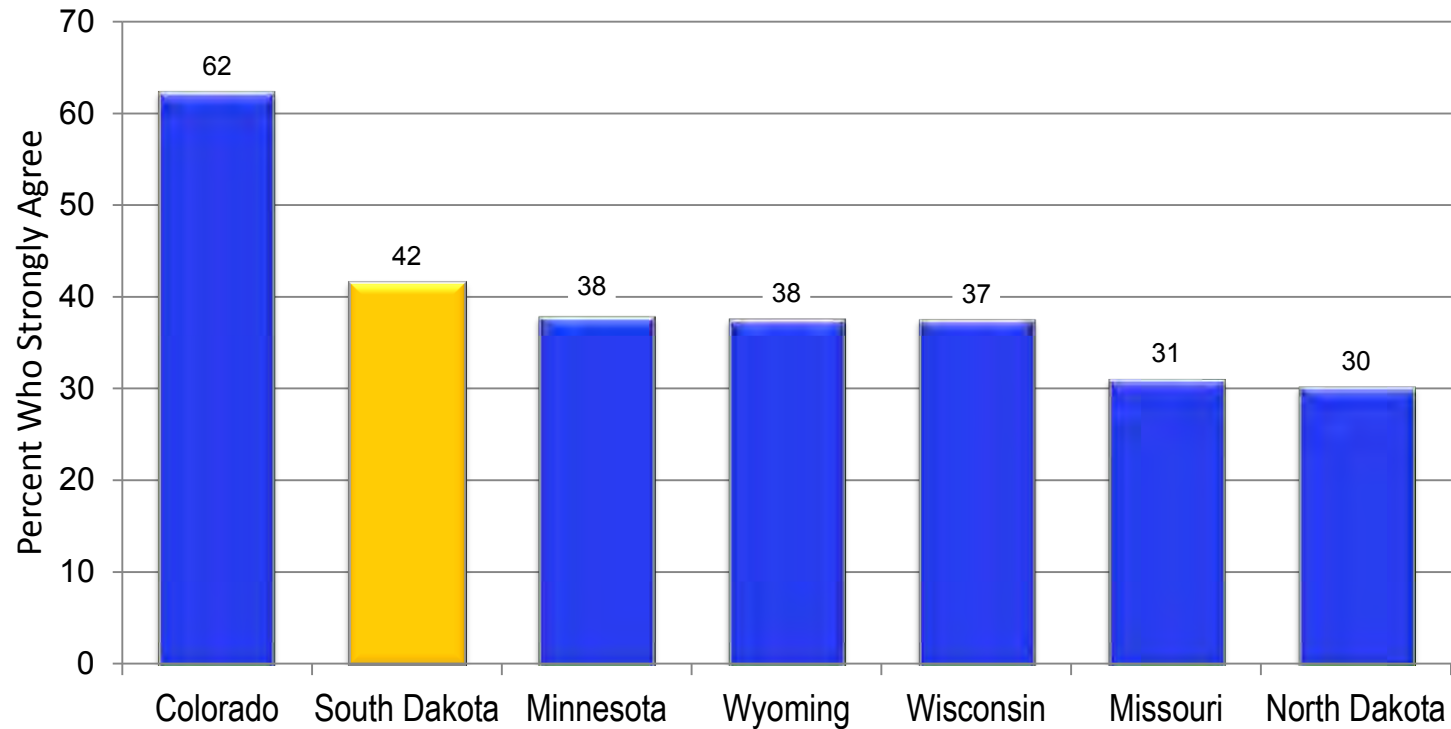


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Exciting



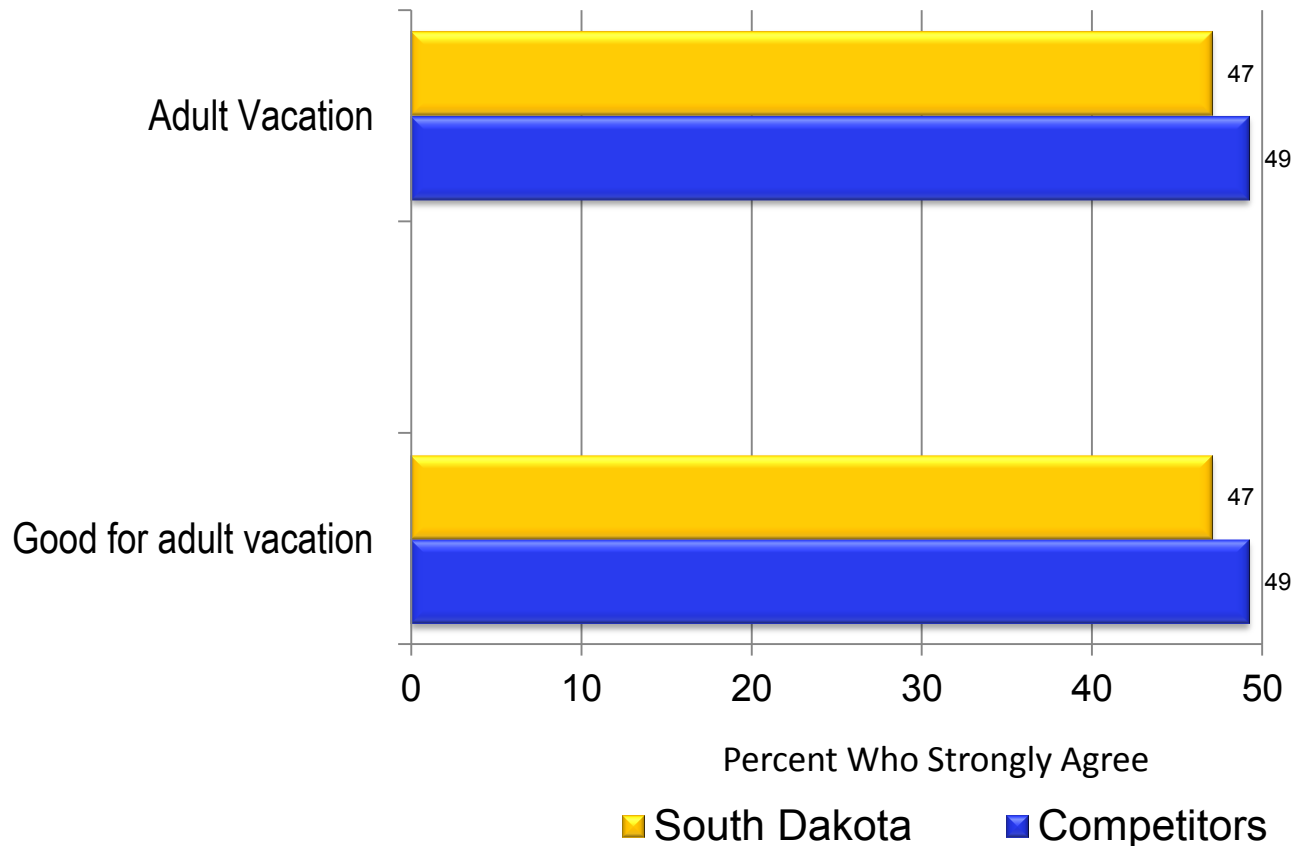
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Adult Vacation



Base: Residents of South Dakota's Regional Advertising Markets

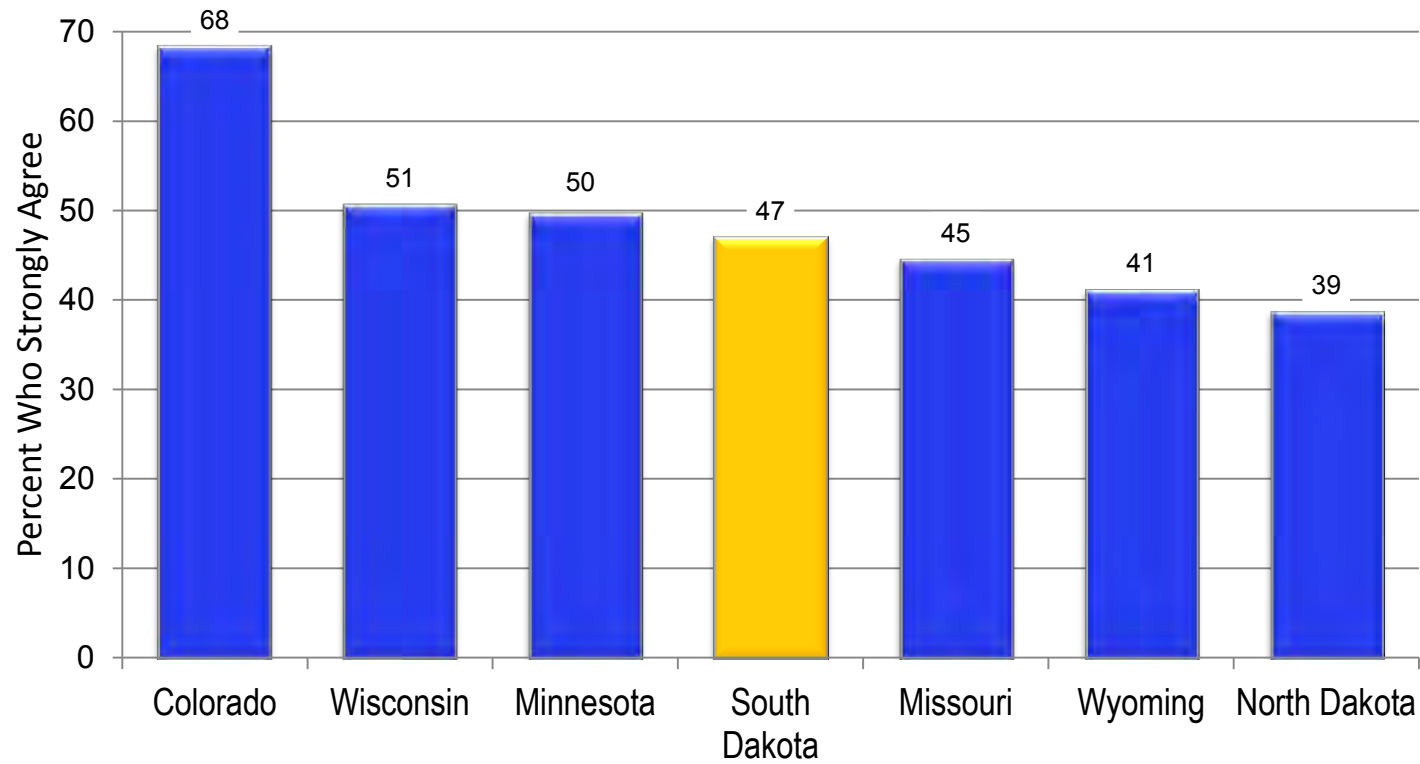


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Adult Vacation



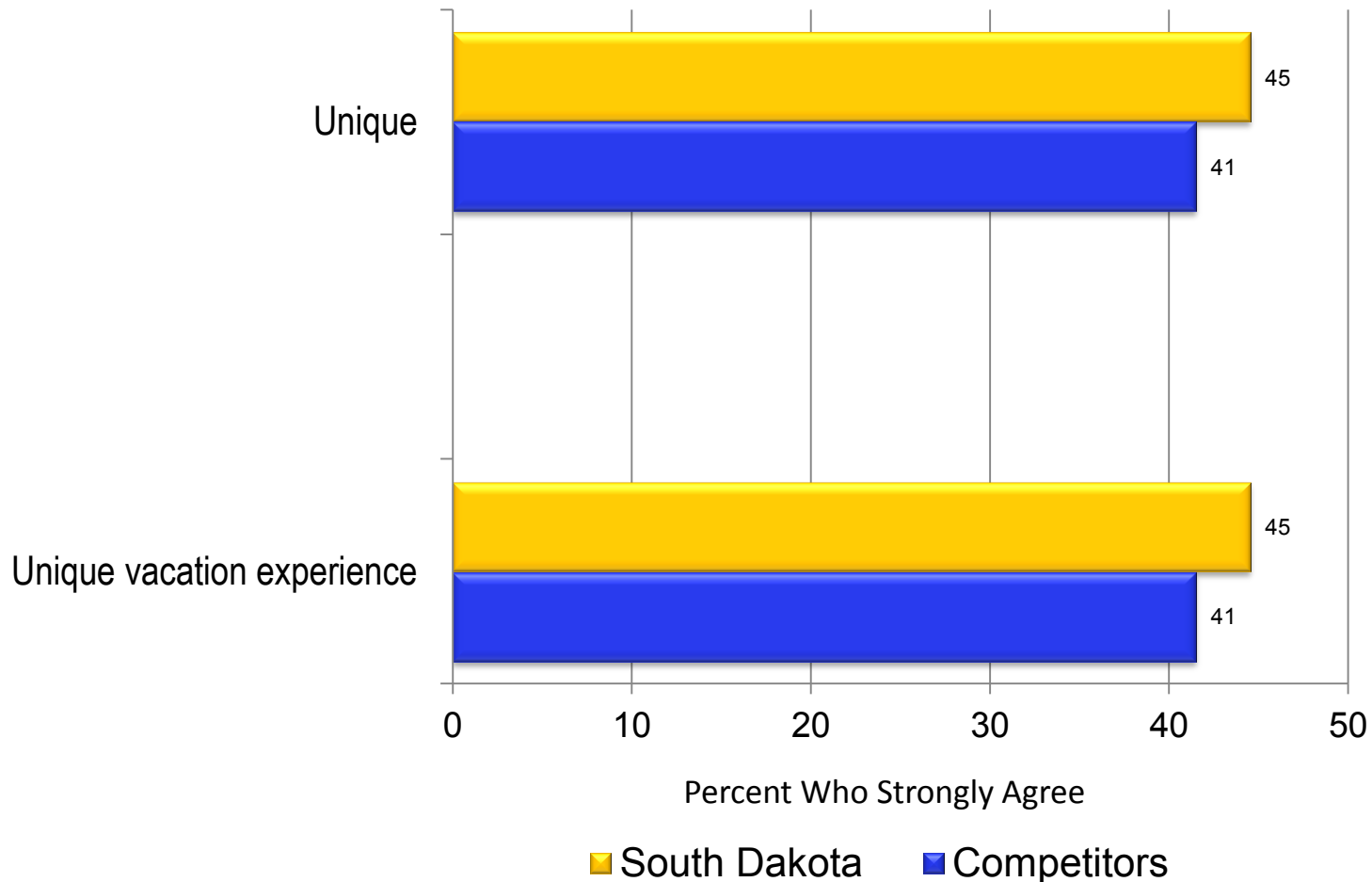
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Unique



Base: Residents of South Dakota's Regional Advertising Markets

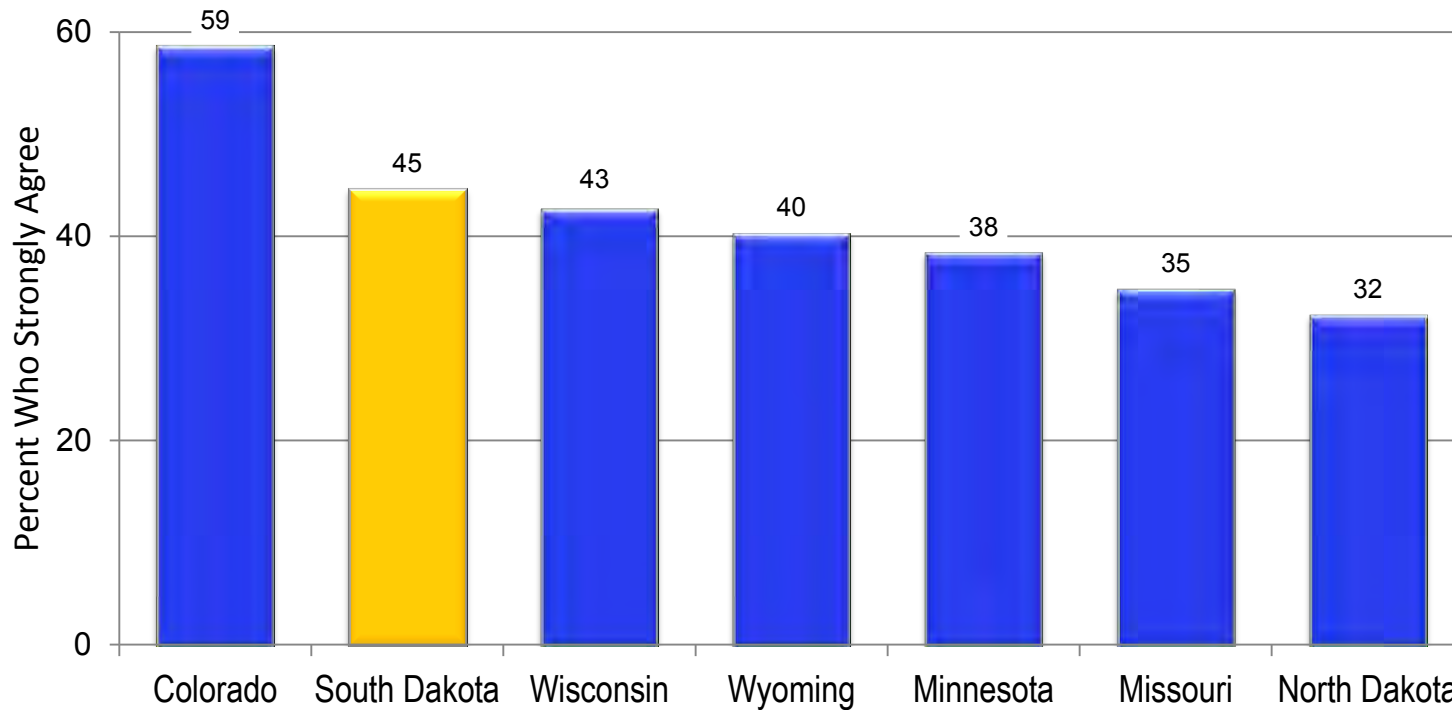


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Unique



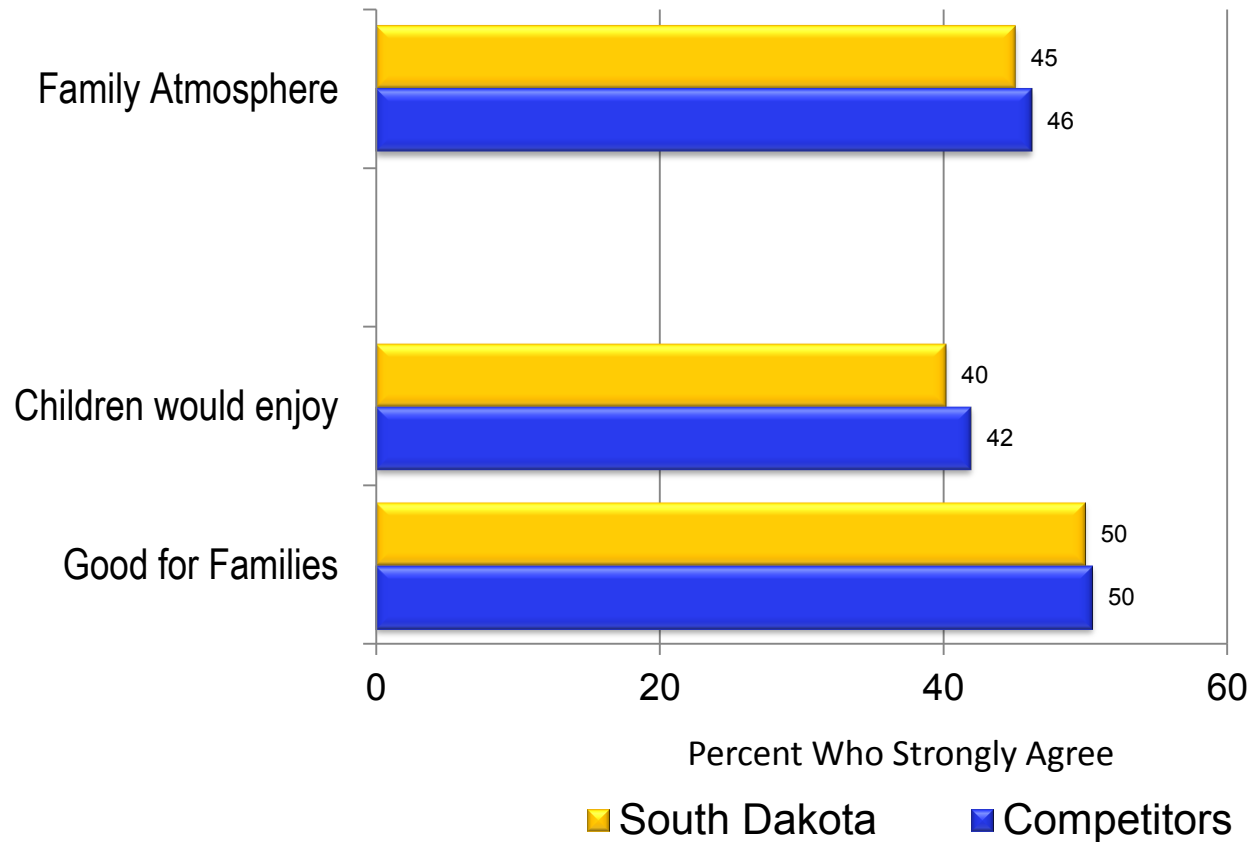
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Family Atmosphere



Base: Residents of South Dakota's Regional Advertising Markets

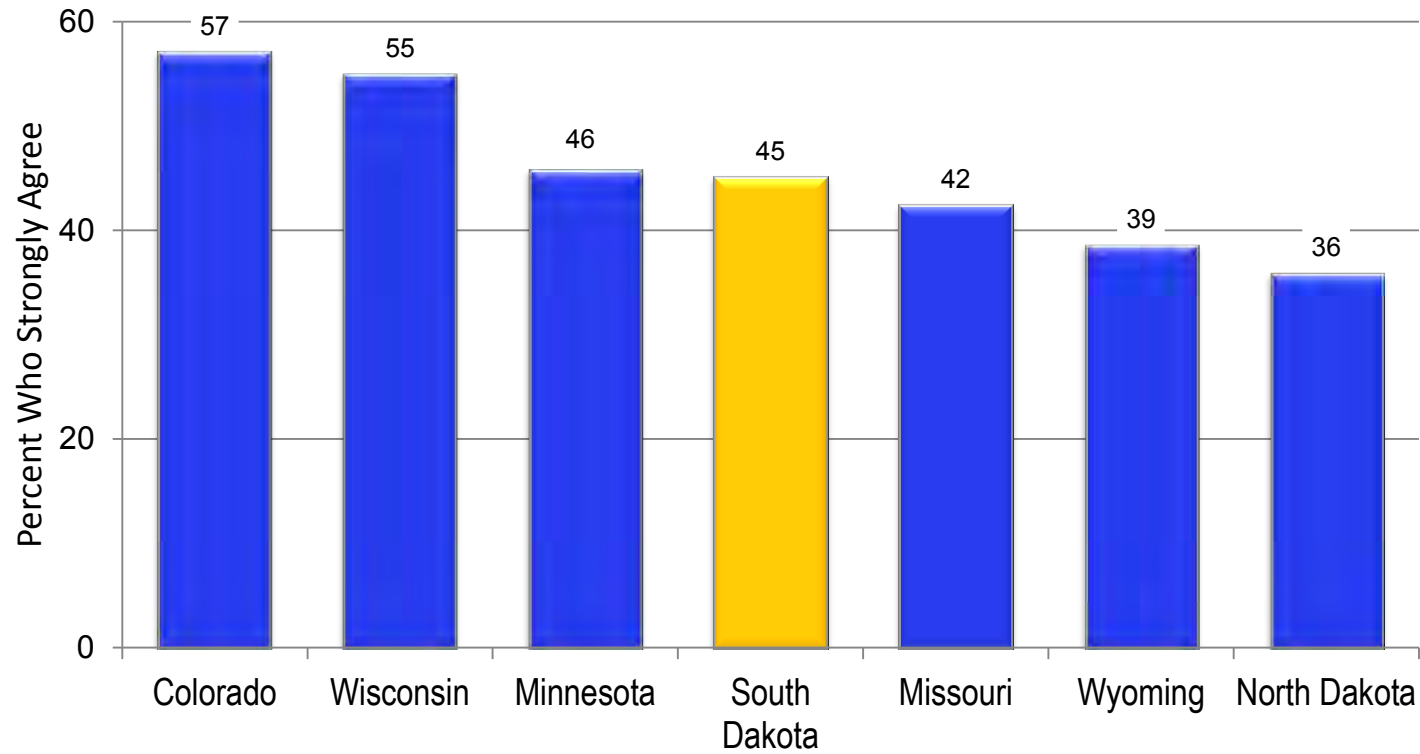


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Family Atmosphere



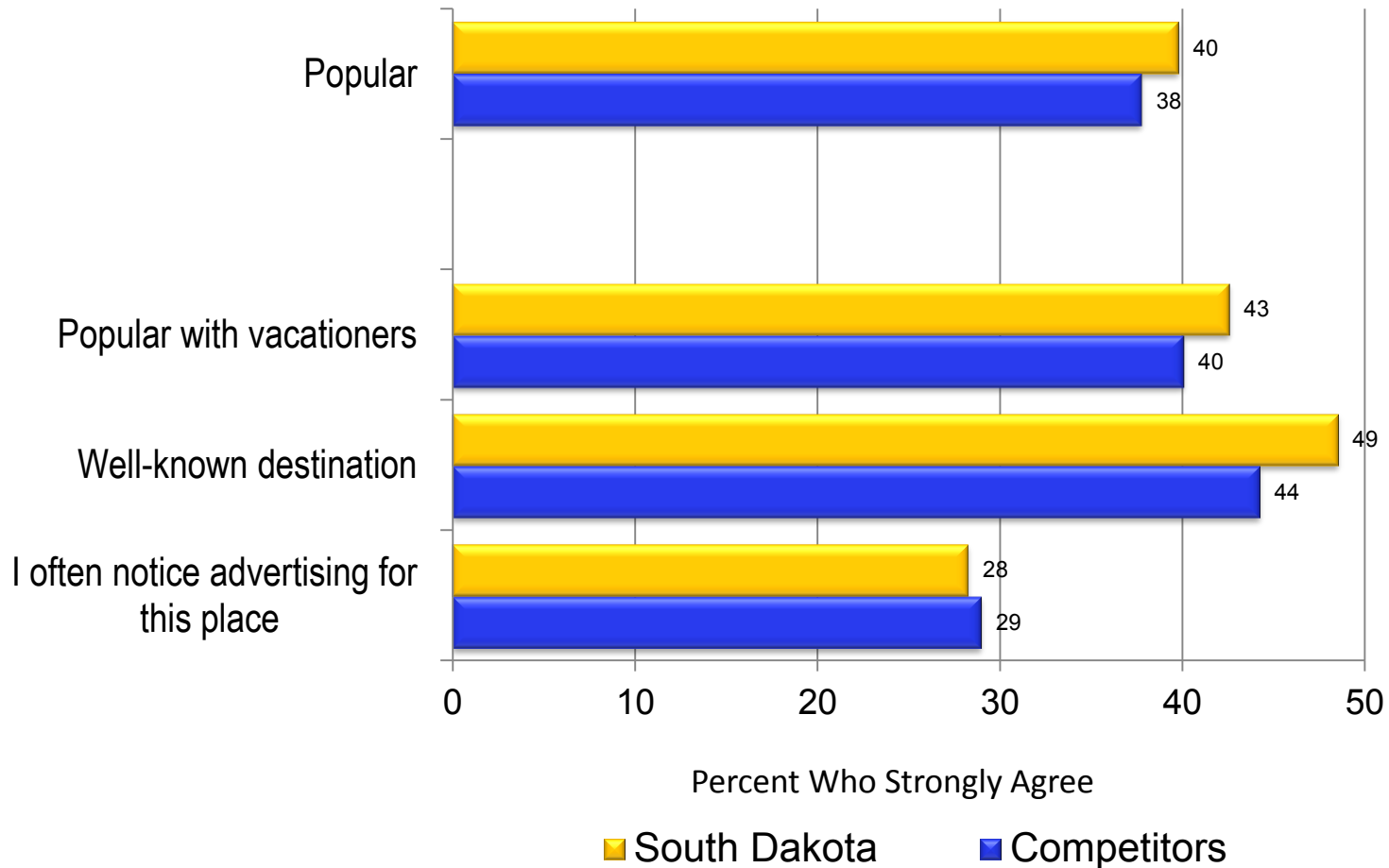
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Popular



Base: Residents of South Dakota's Regional Advertising Markets

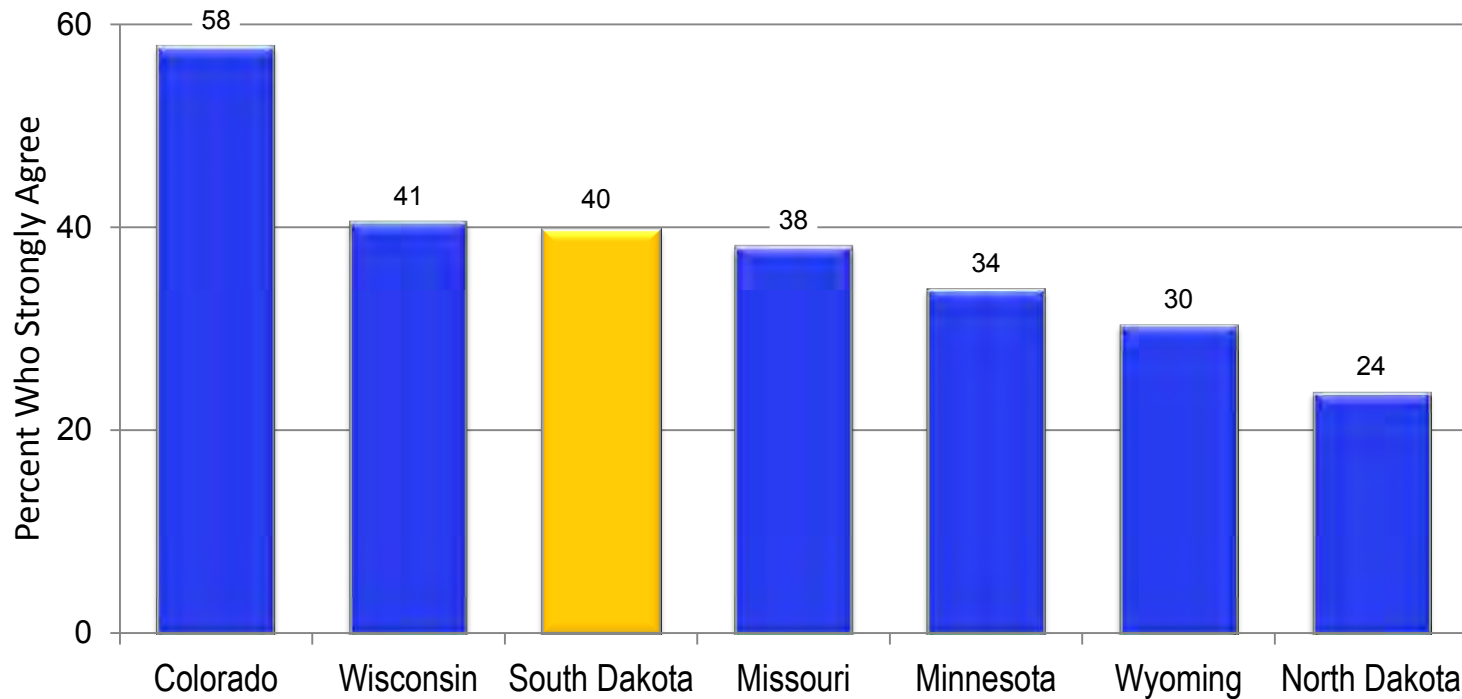


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Popular



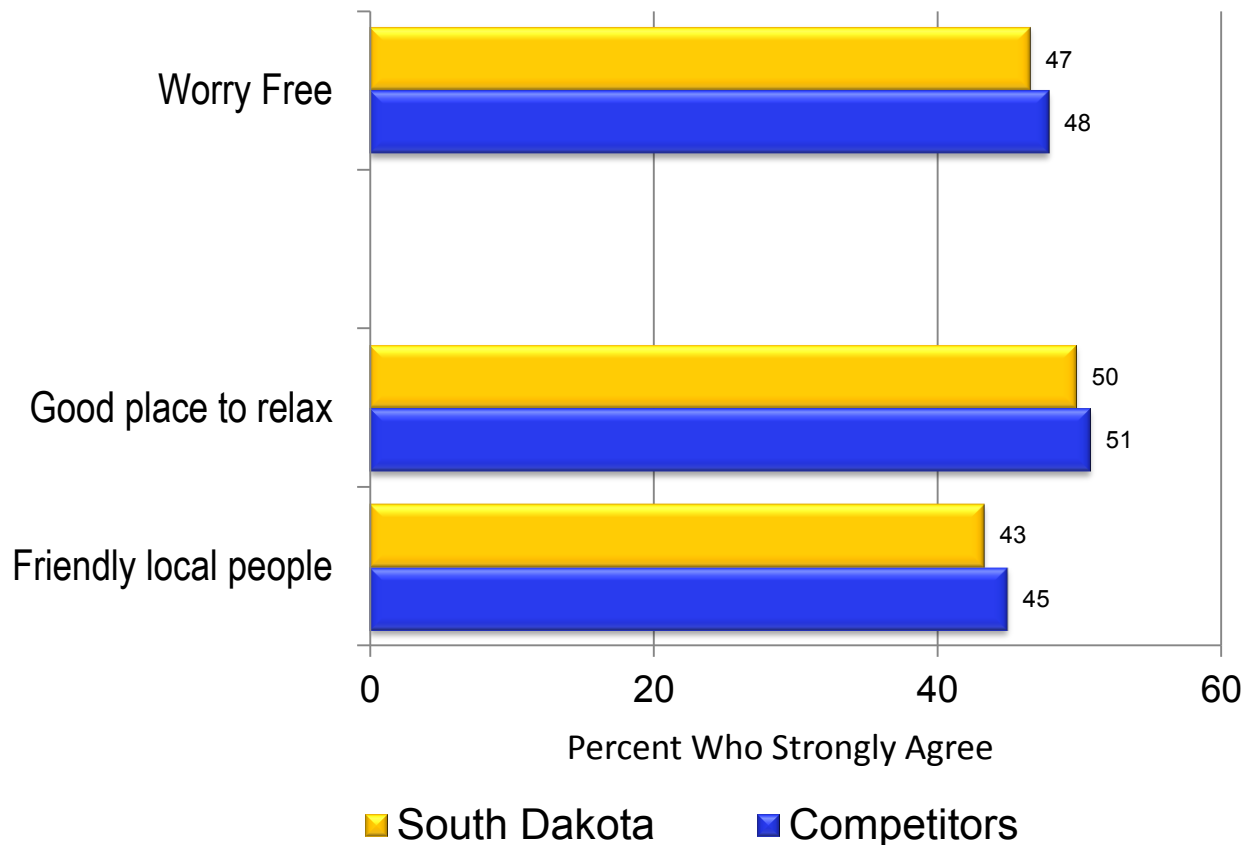
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Worry Free



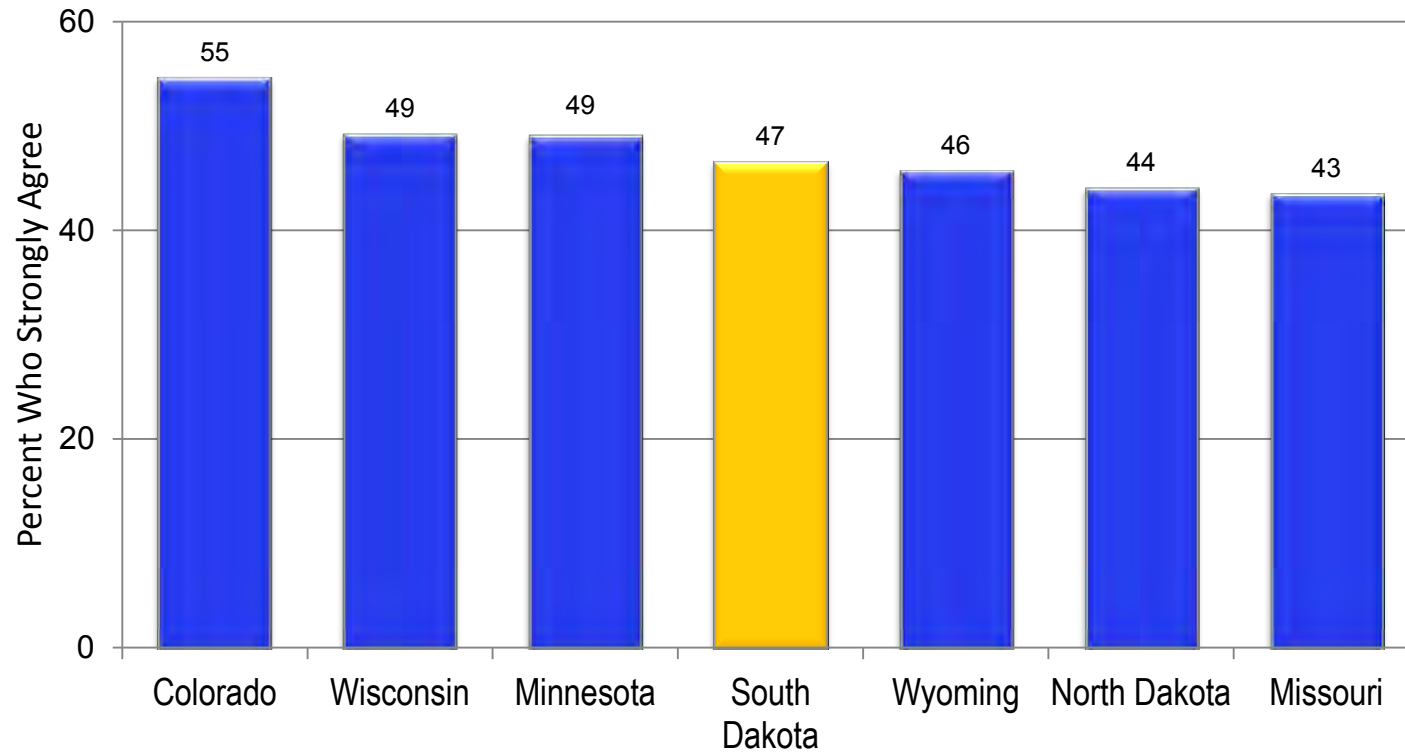
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Worry Free



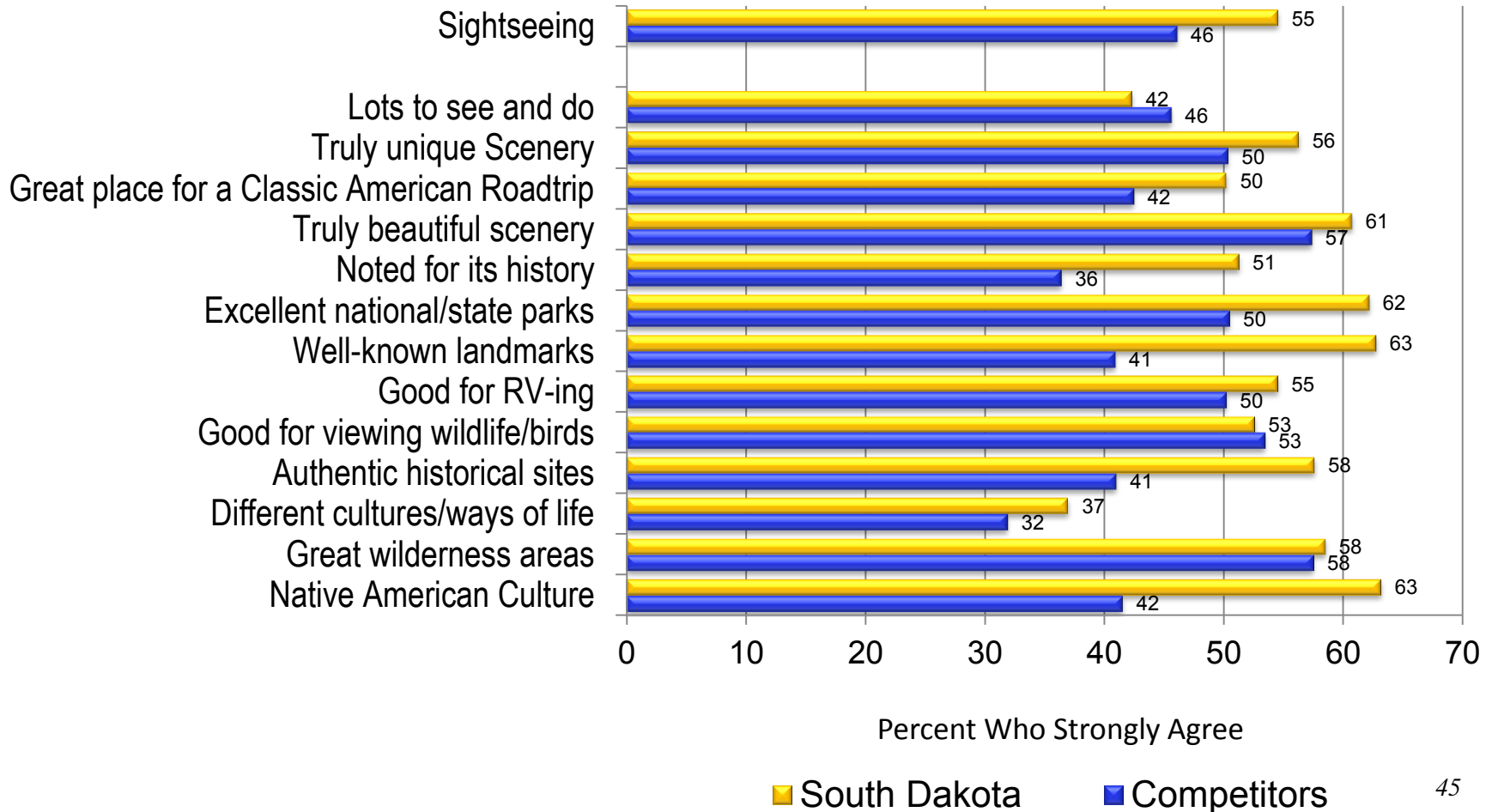
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Sightseeing



Base: Residents of South Dakota's Regional Advertising Markets

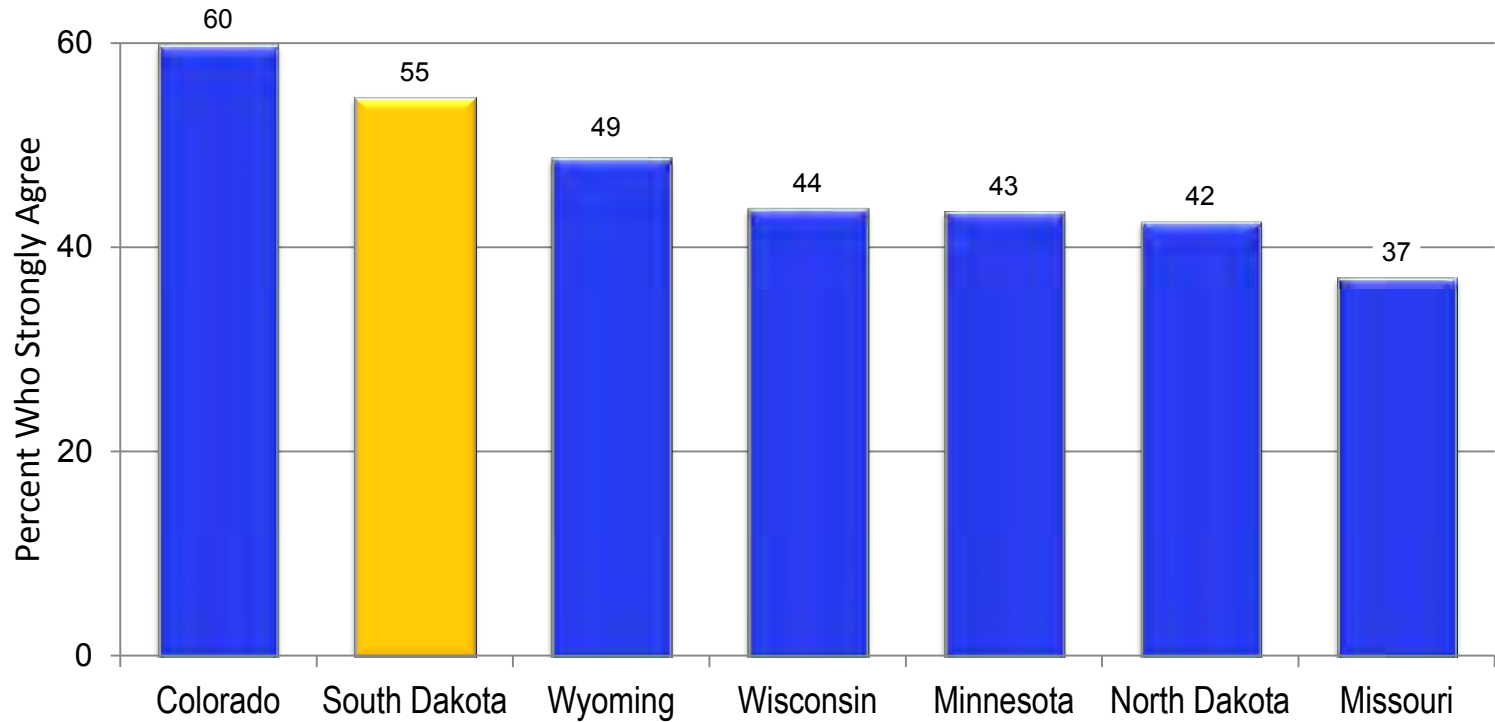


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Sightseeing



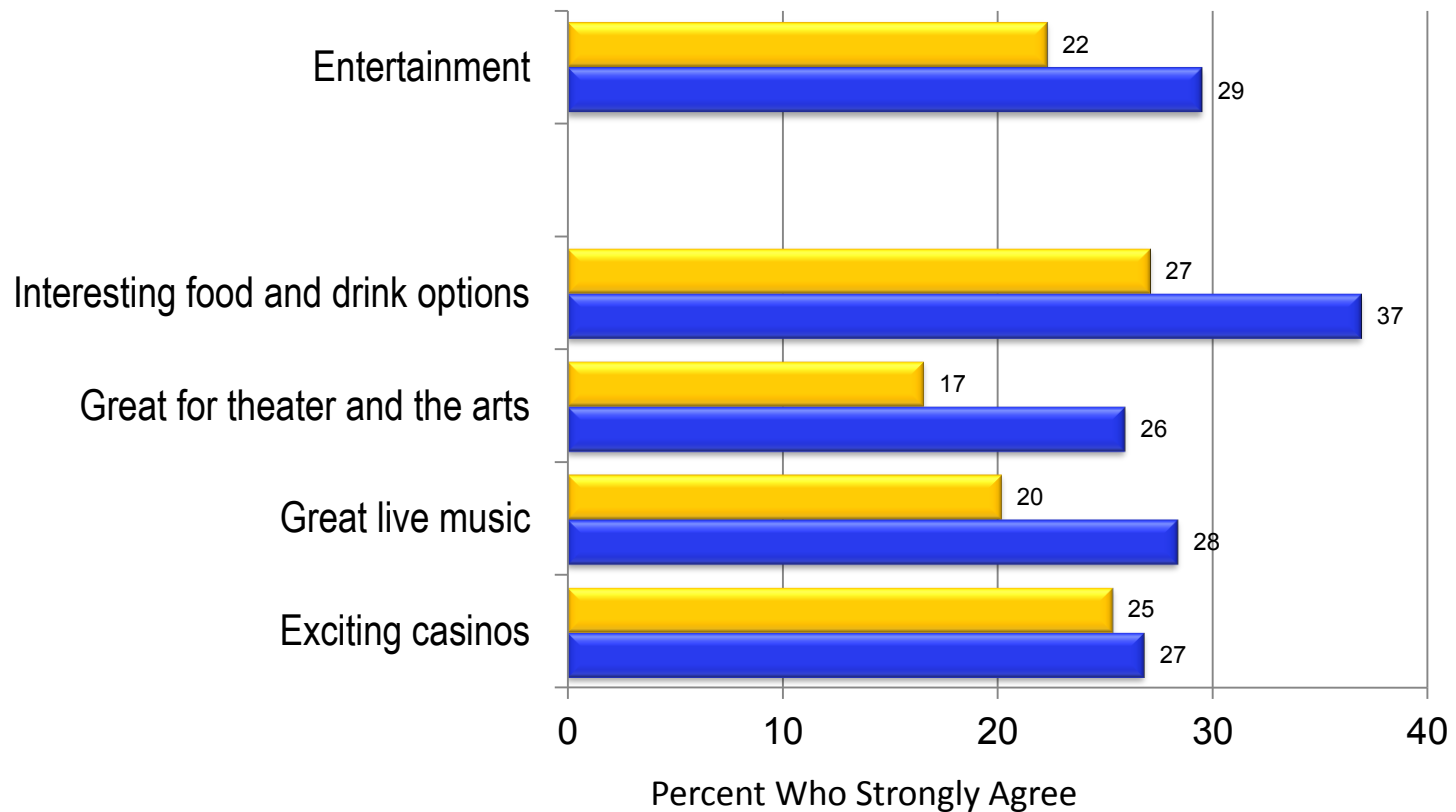
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Entertainment



Base: Residents of South Dakota's Regional Advertising Markets



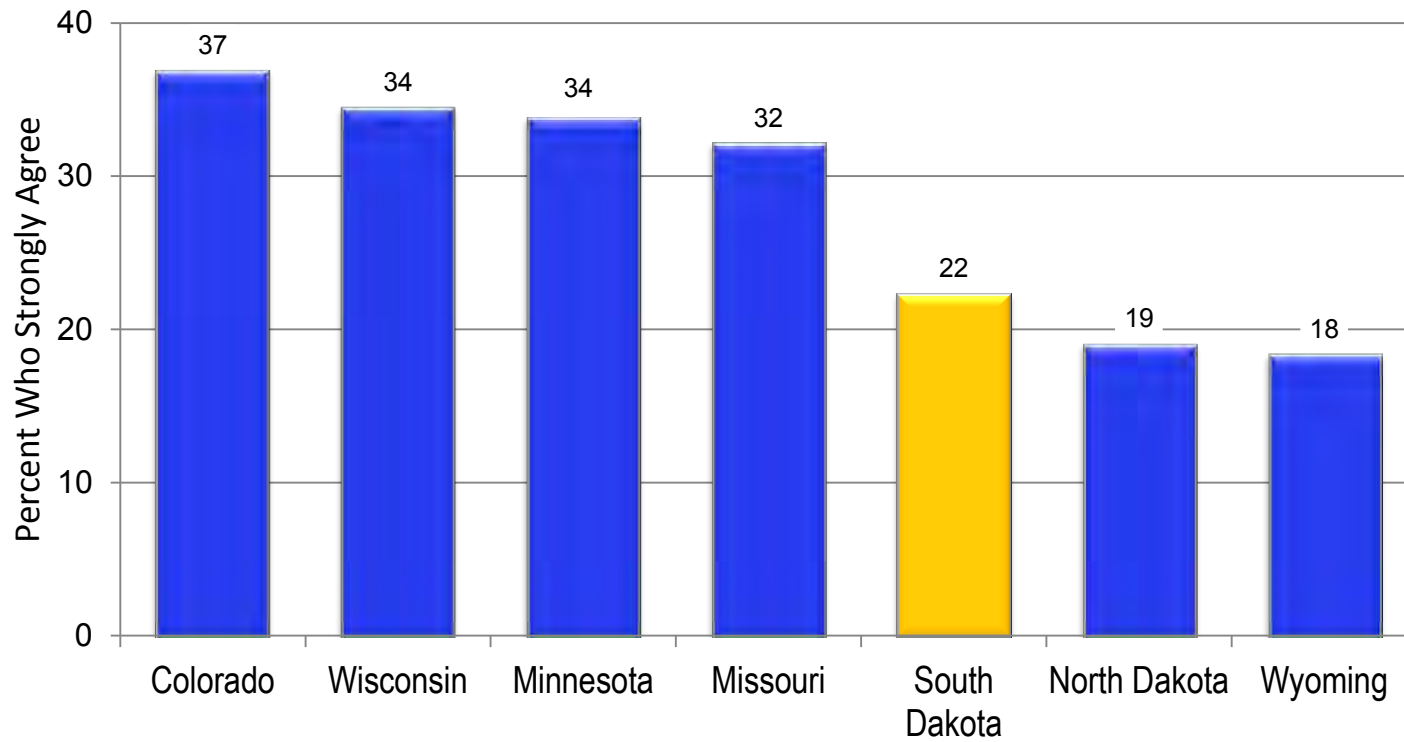
■ South Dakota ■ Competitors

* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Entertainment



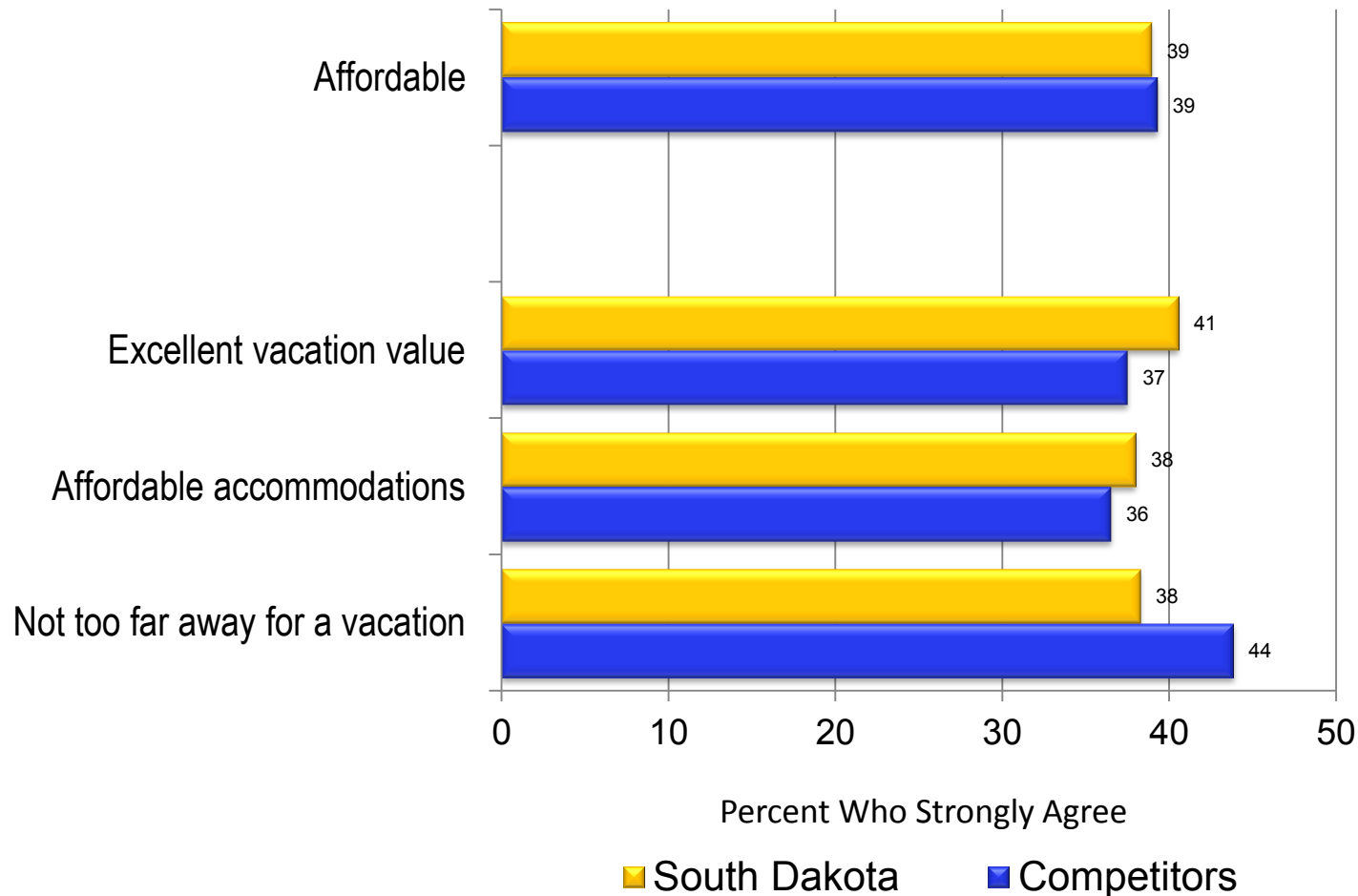
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Affordable



Base: Residents of South Dakota's Regional Advertising Markets

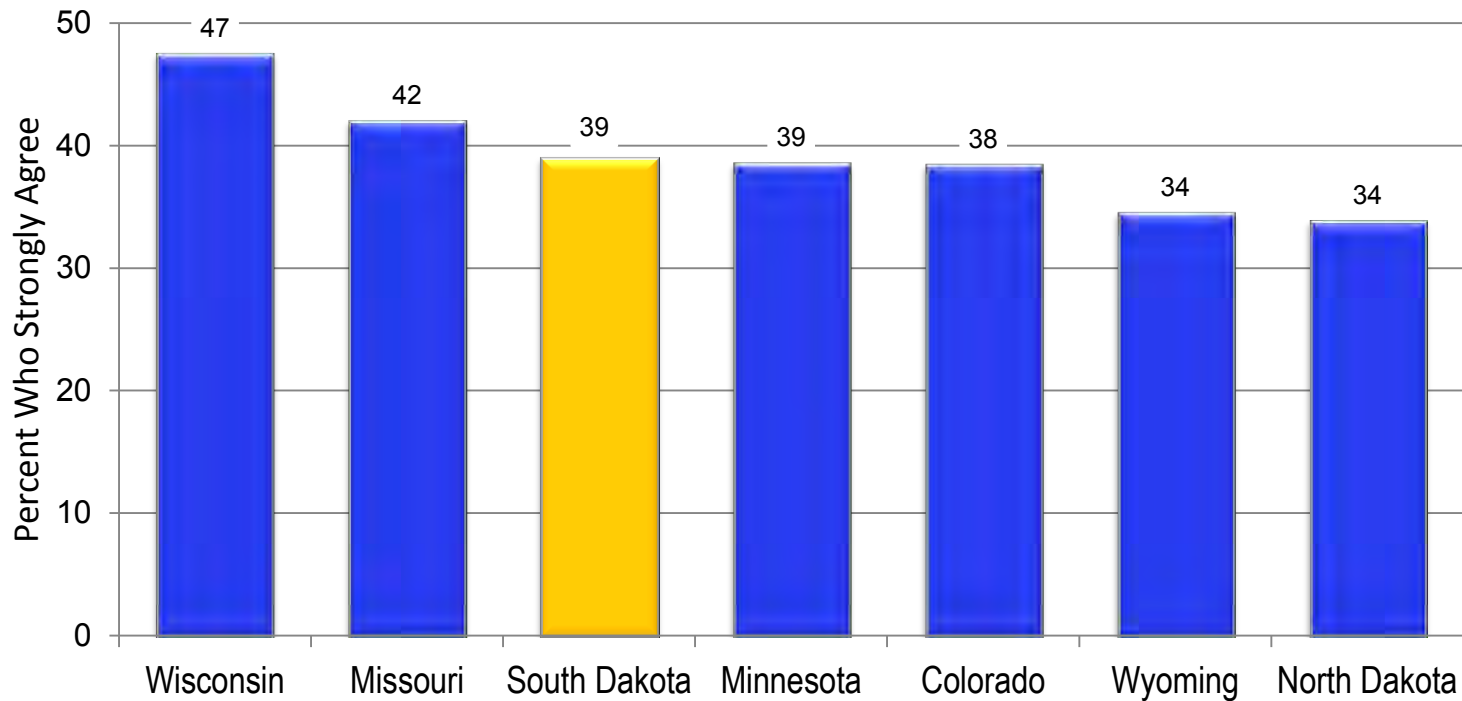


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Affordable



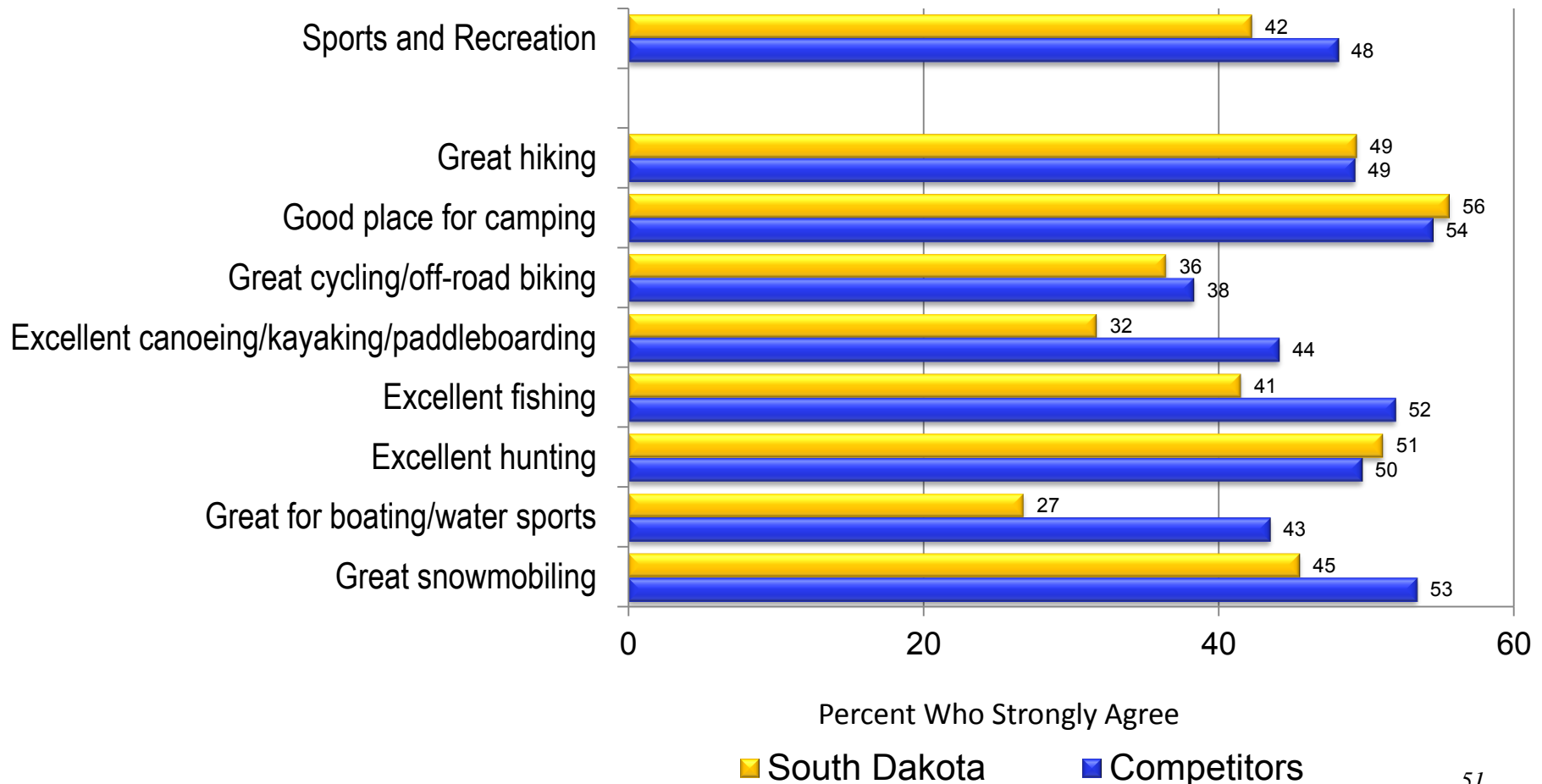
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competitors — Sports & Recreation



Base: Residents of South Dakota's Regional Advertising Markets

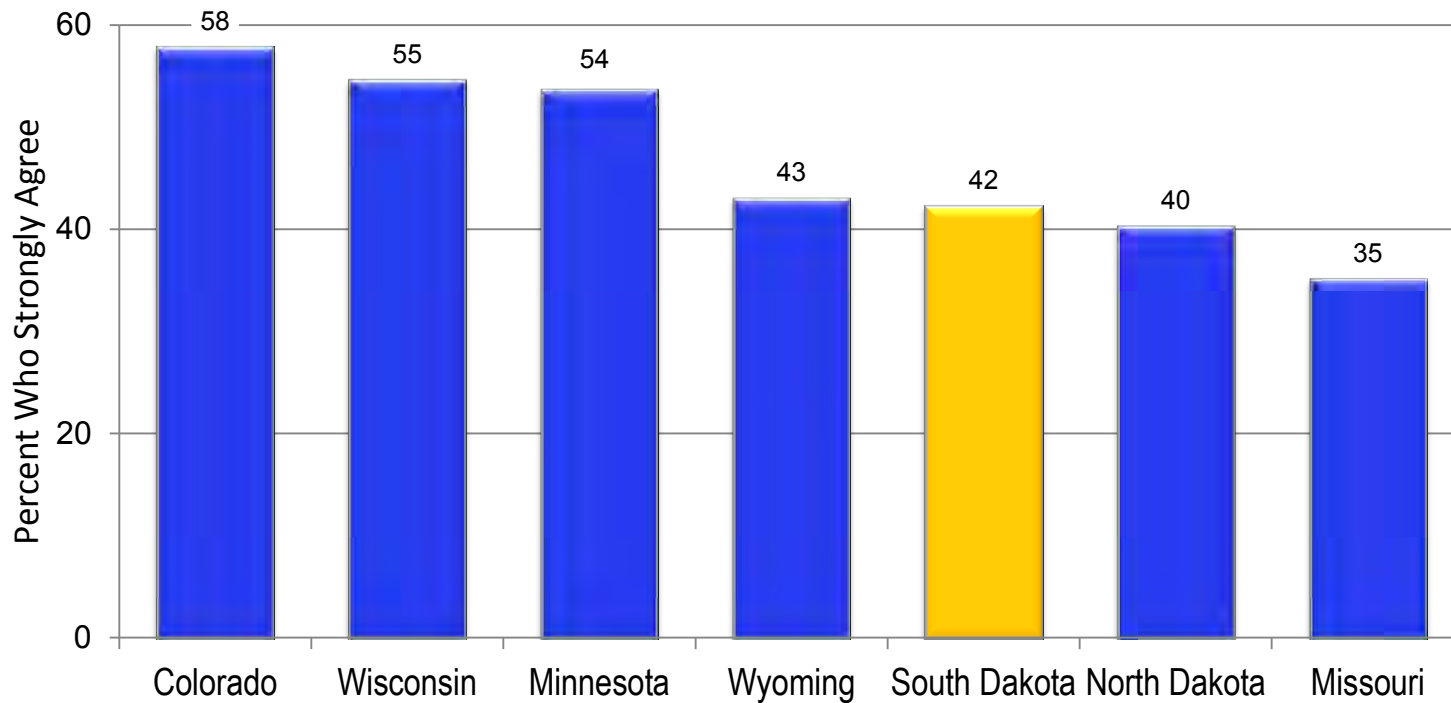


* Competitors include: North Dakota, Minnesota, Wyoming, Wisconsin, Missouri, Colorado

South Dakota's Image vs. Competitors — Sports & Recreation



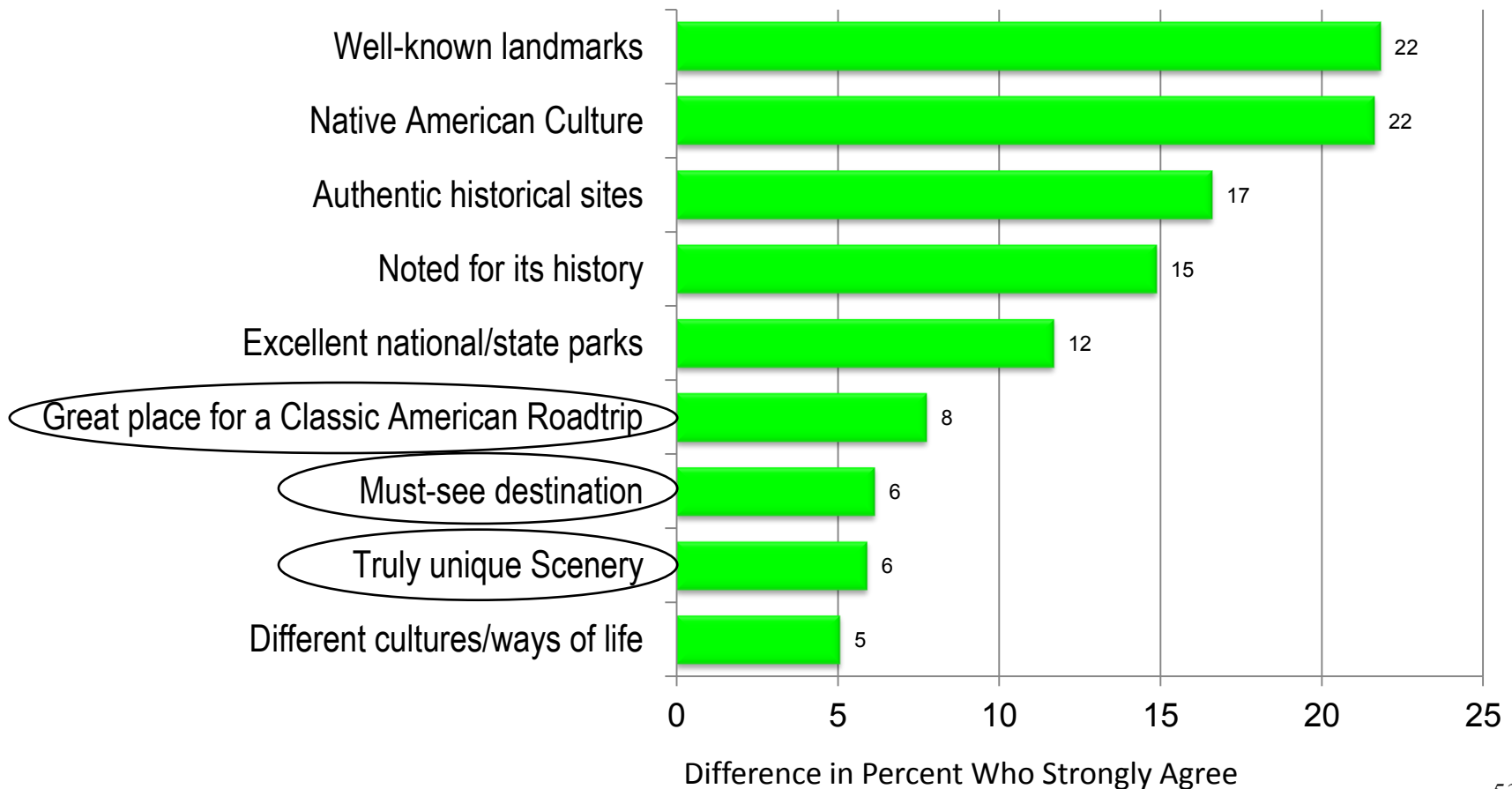
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Strengths vs. Competitors



Base: Residents of South Dakota's Regional Advertising Markets

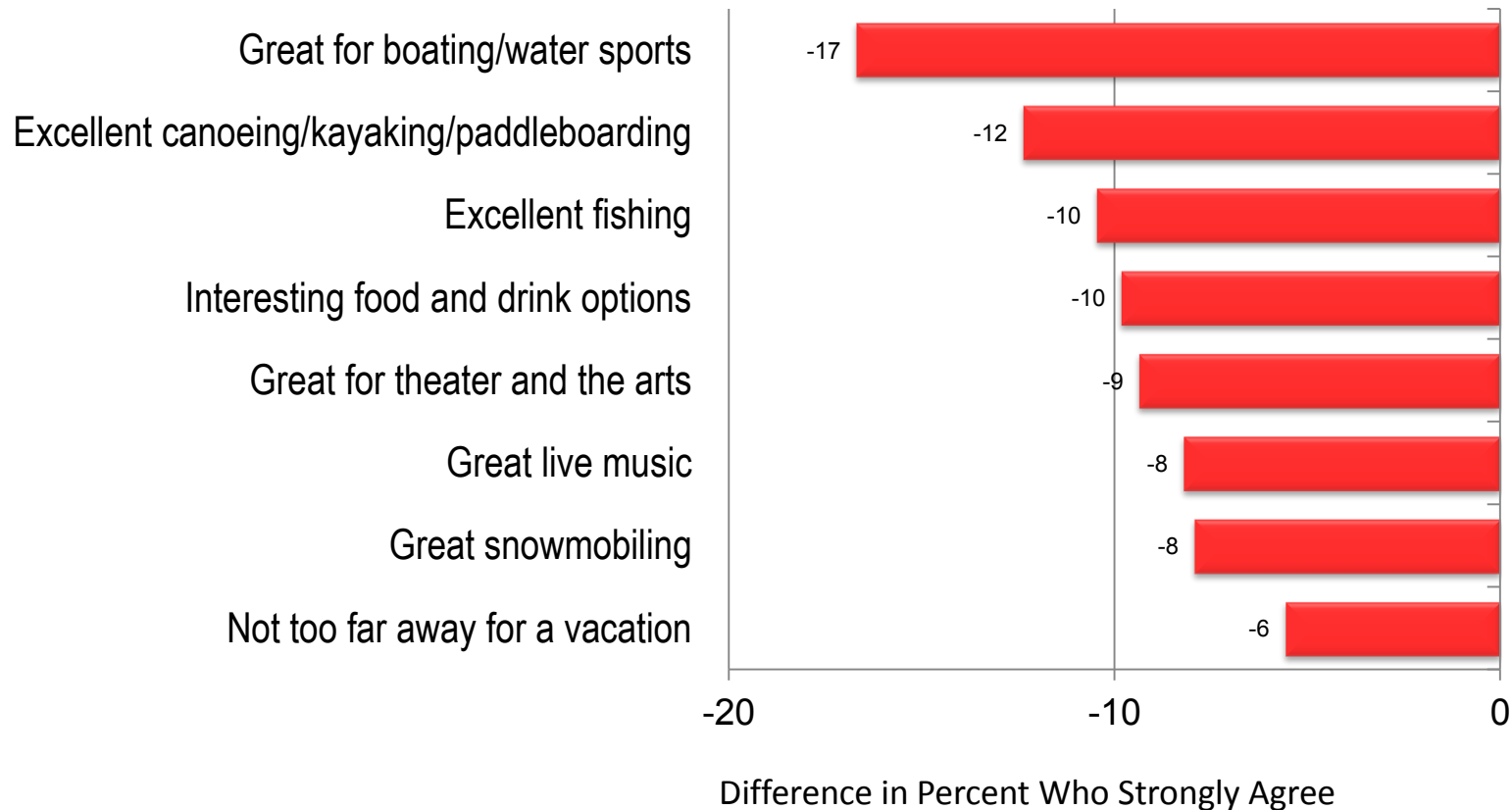


Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. Competitors



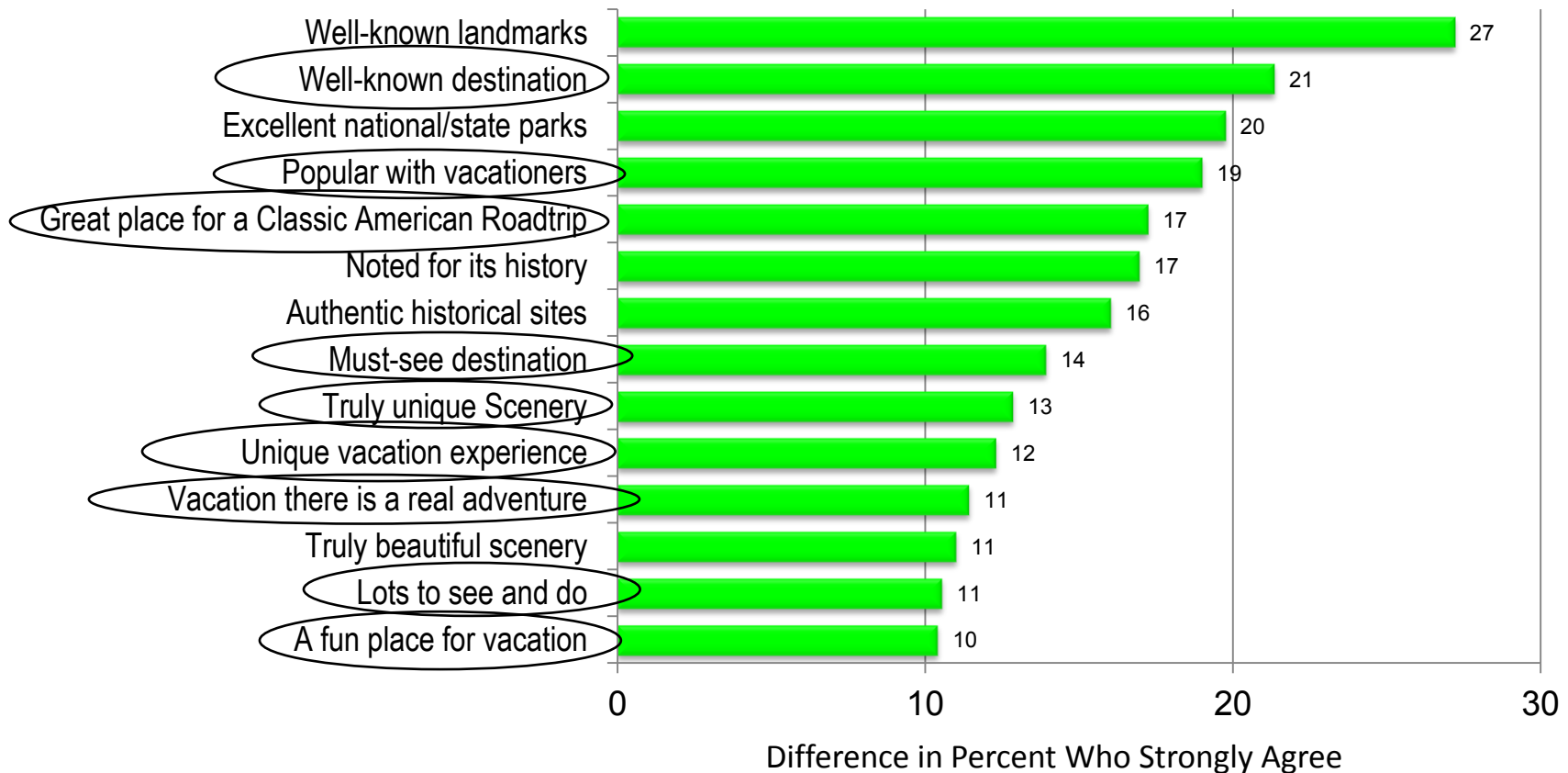
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Strengths vs. North Dakota



Base: Residents of South Dakota's Regional Advertising Markets

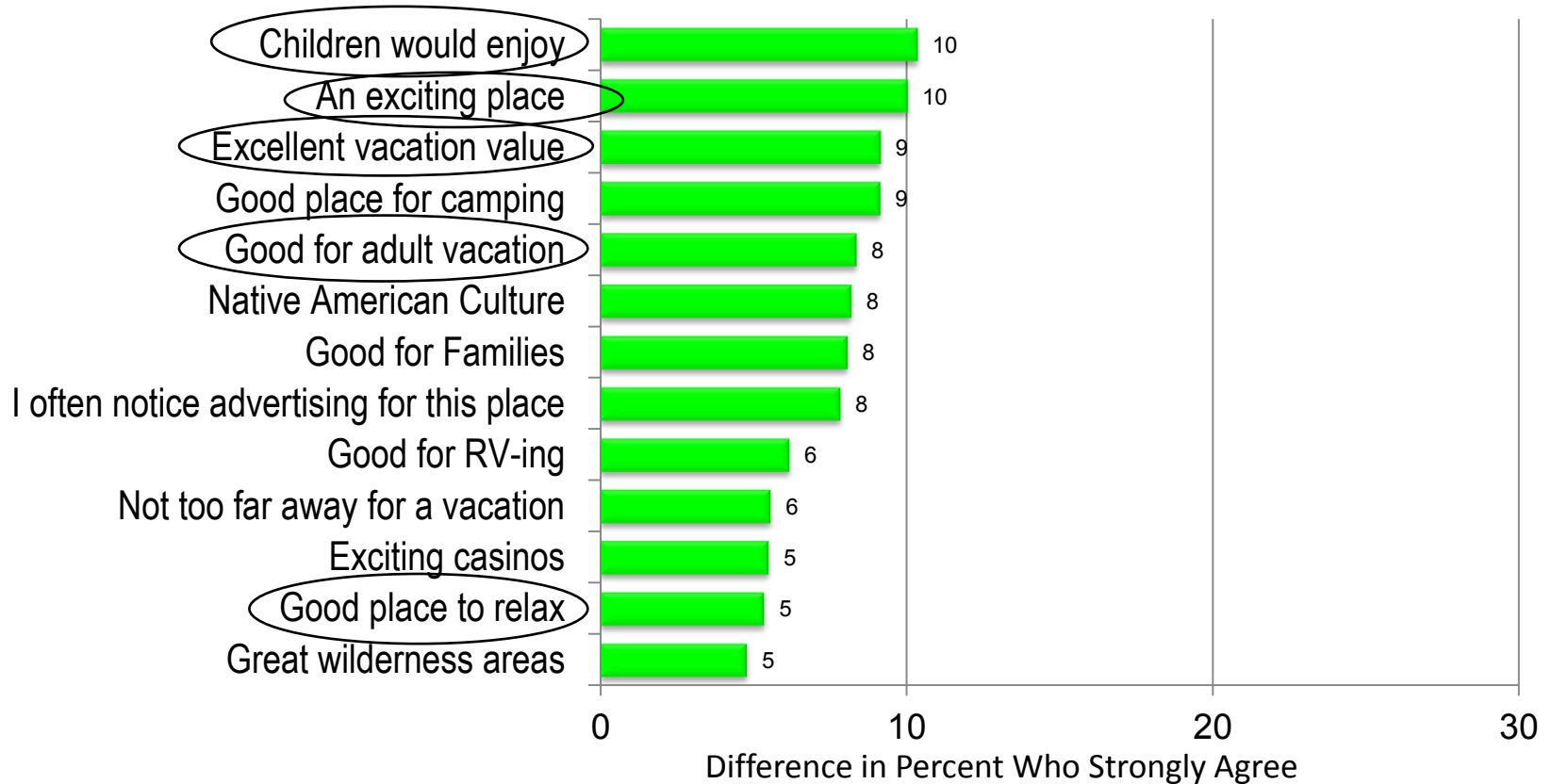


Circled attributes are image hot buttons

South Dakota's Image Strengths vs. North Dakota (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets



Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. North Dakota



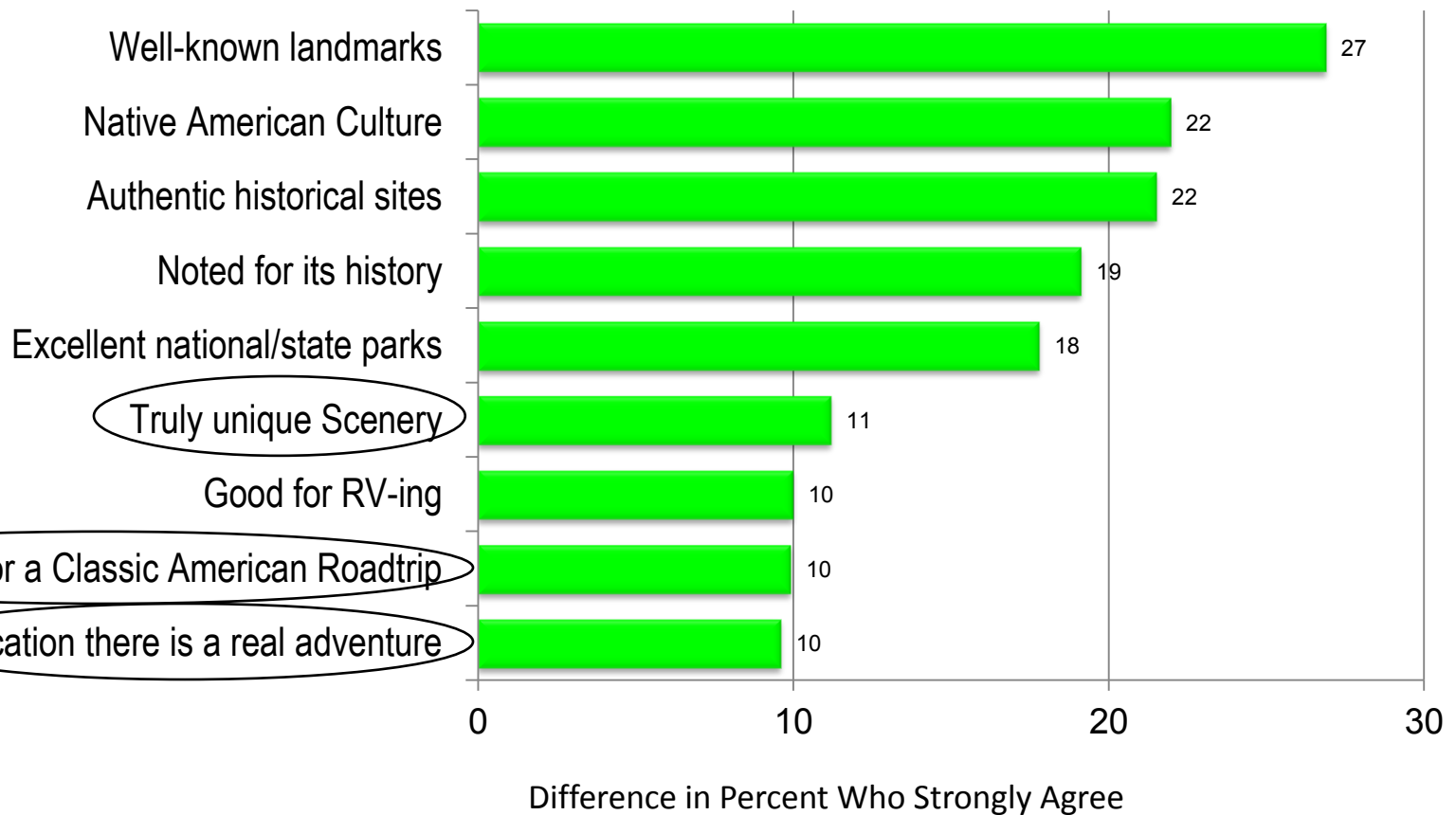
Base: Residents of South Dakota's Regional Advertising Markets

**No Image Weaknesses
vs. North Dakota**

South Dakota's Image Strengths vs. Minnesota



Base: Residents of South Dakota's Regional Advertising Markets

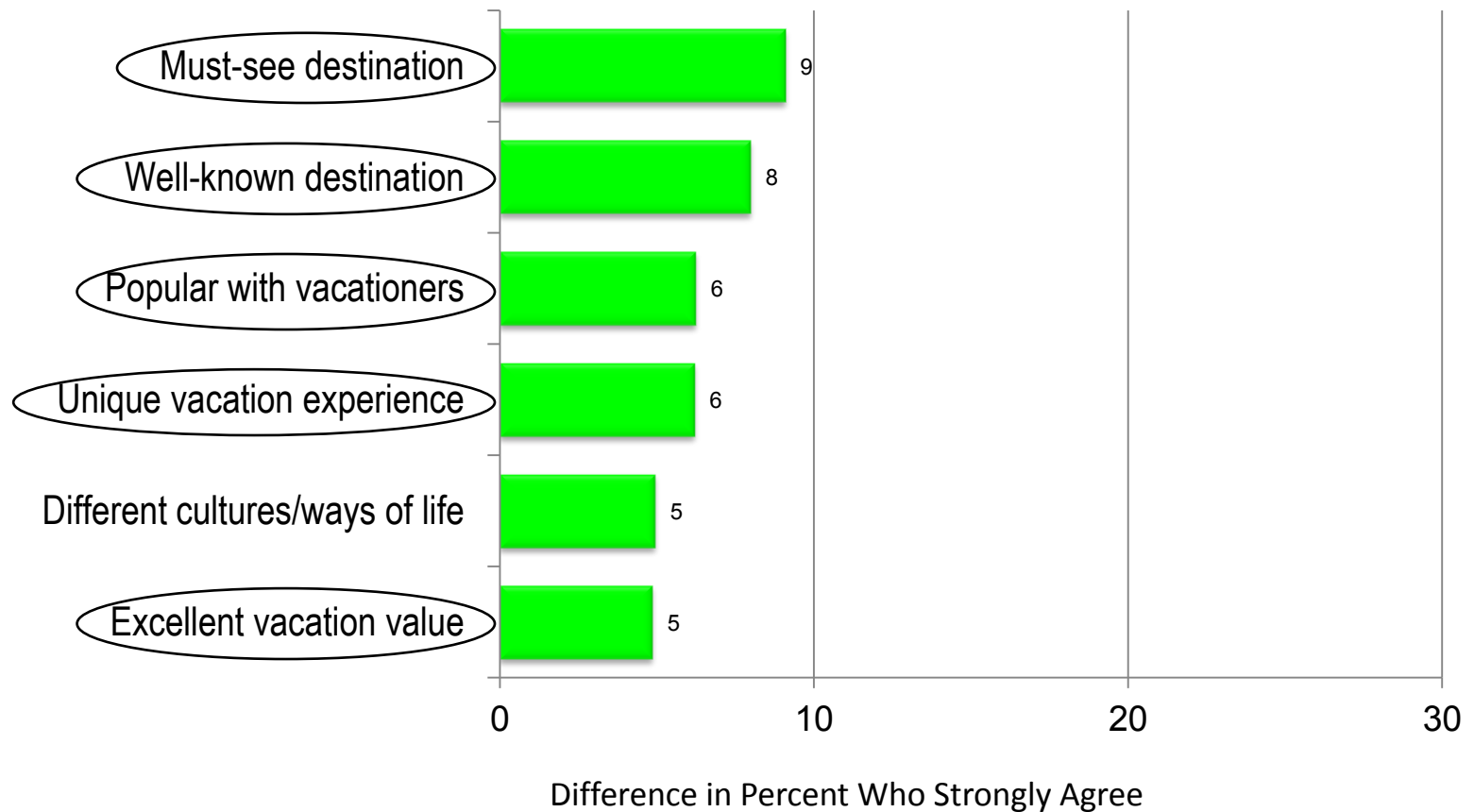


Circled attributes are image hot buttons

South Dakota's Image Strengths vs. Minnesota (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets

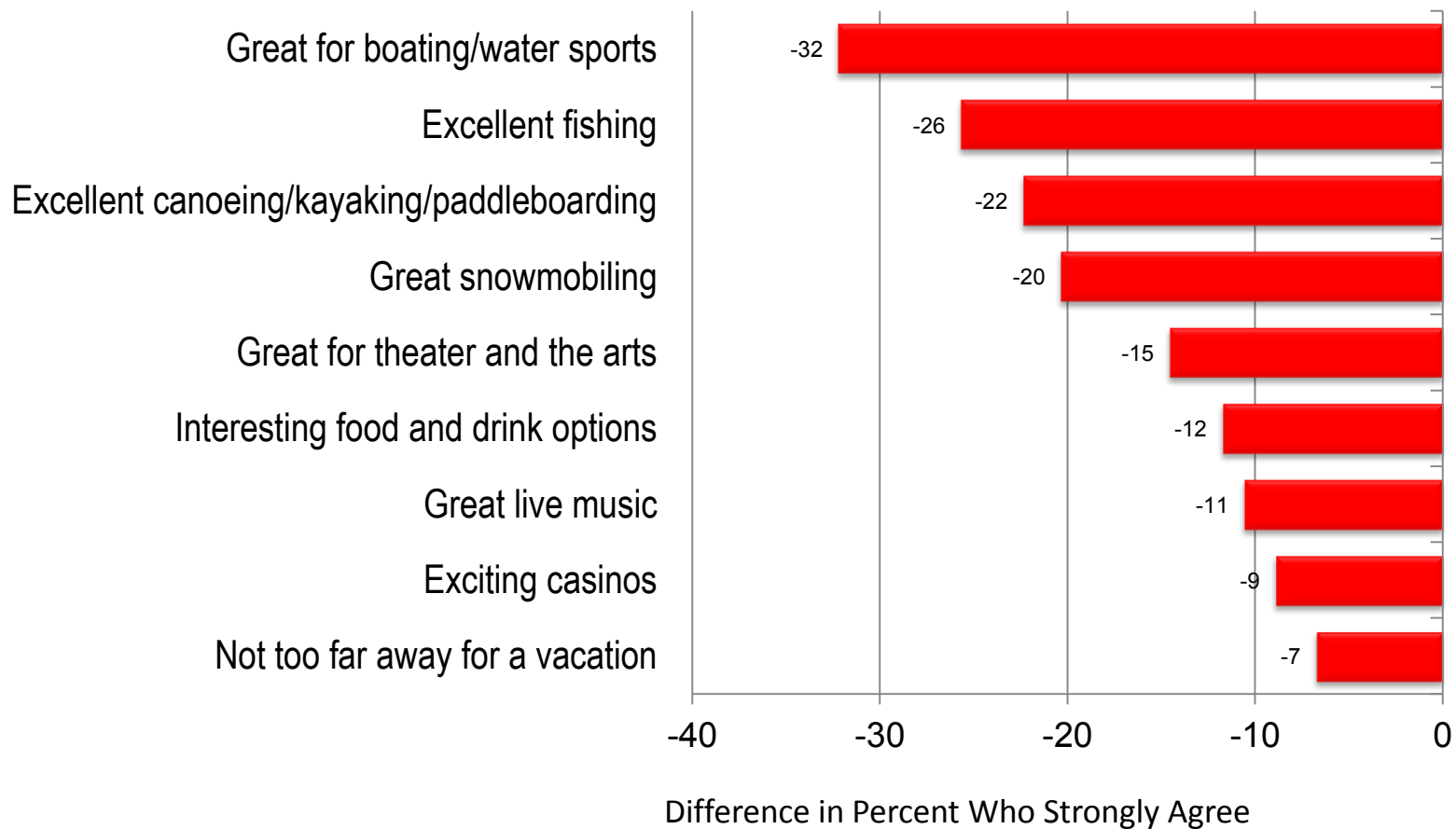


Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. Minnesota



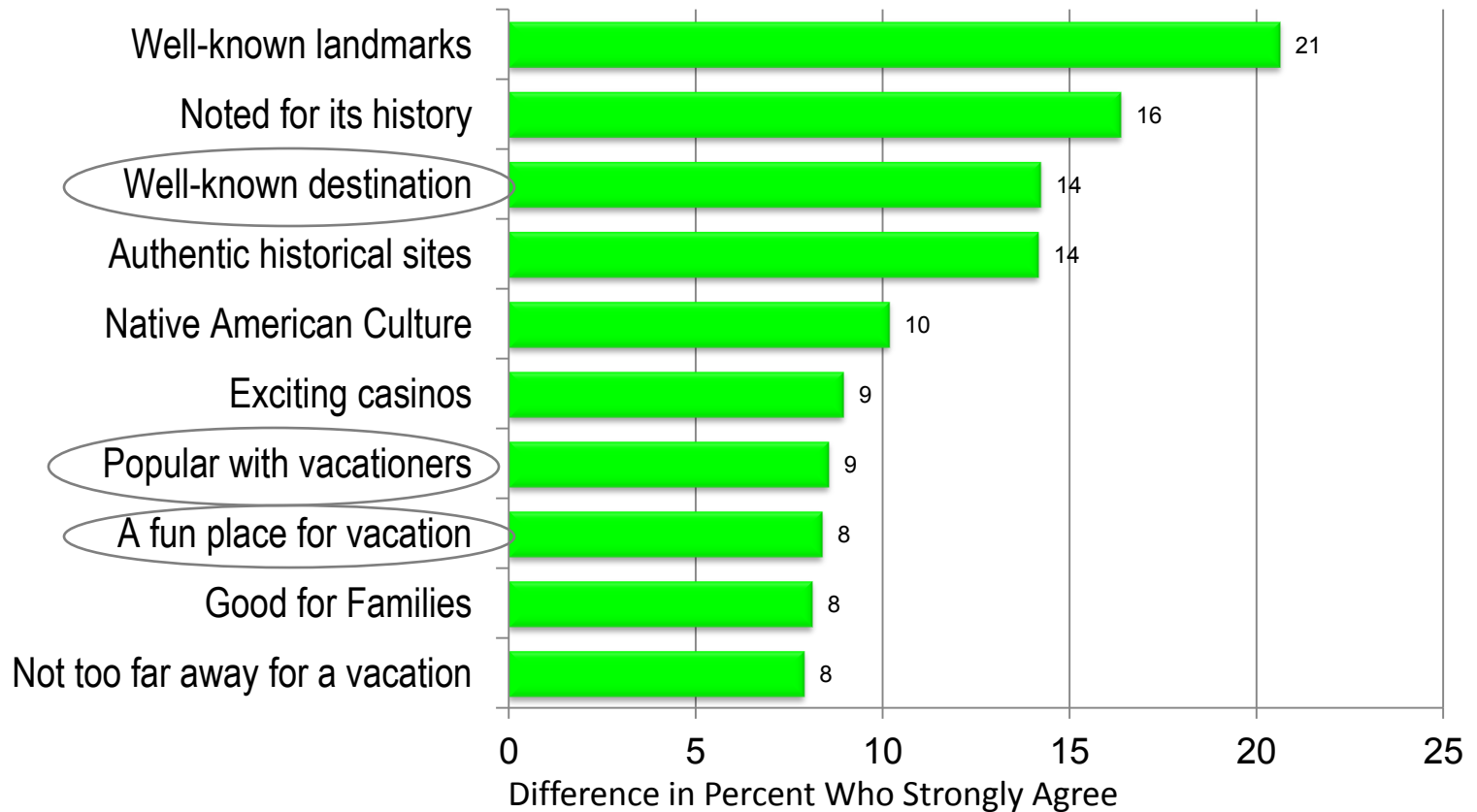
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Strengths vs. Wyoming



Base: Residents of South Dakota's Regional Advertising Markets

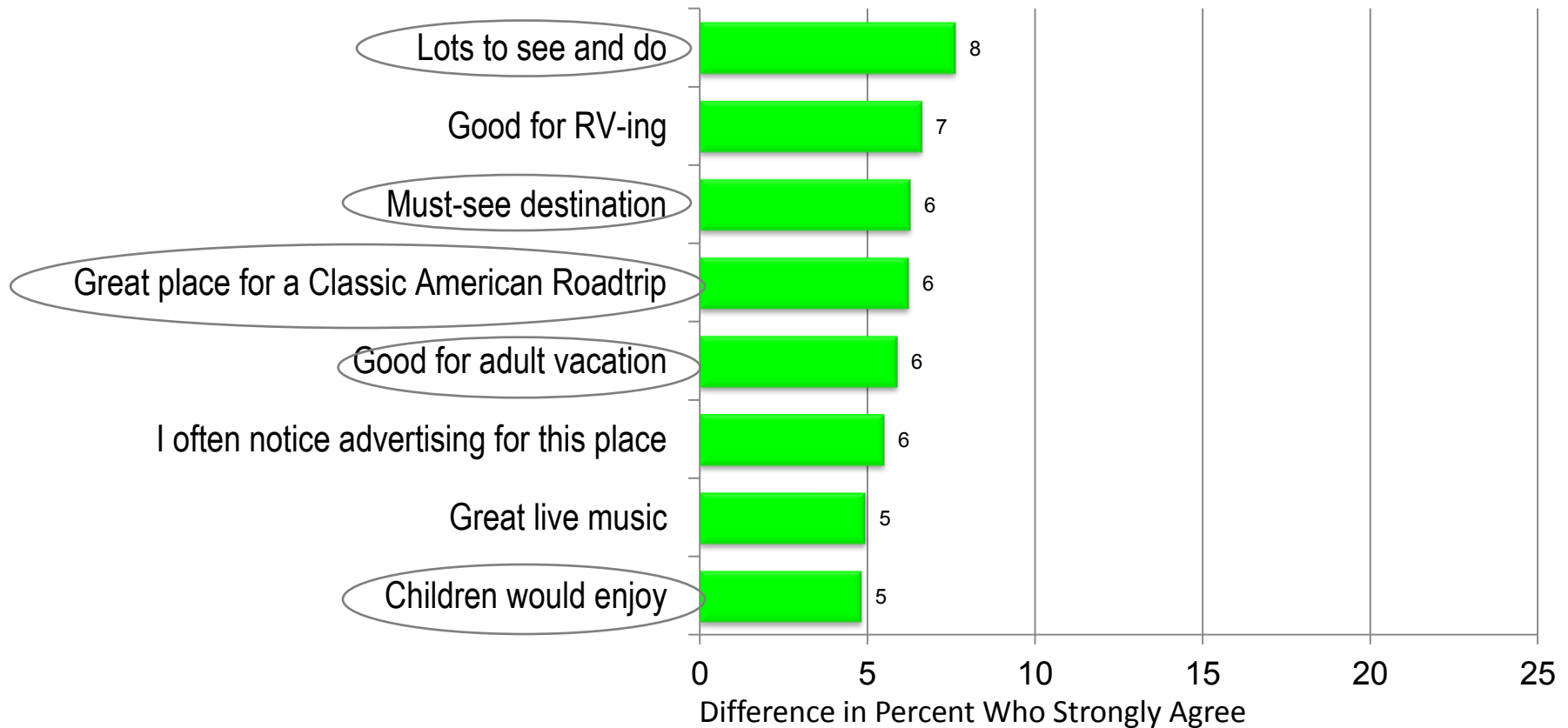


Circled attributes are image hot buttons

South Dakota's Image Strengths vs. Wyoming (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets

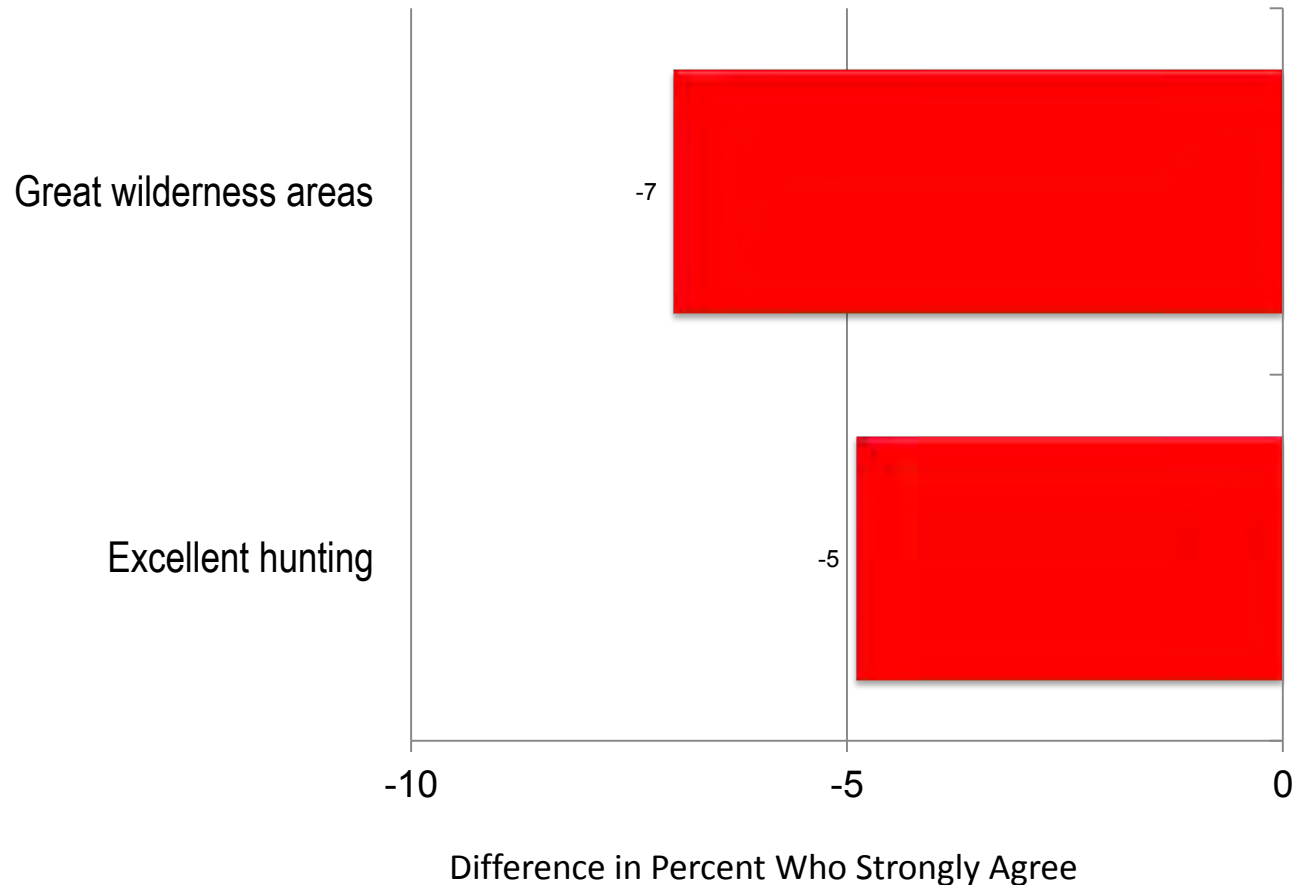


Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. Wyoming



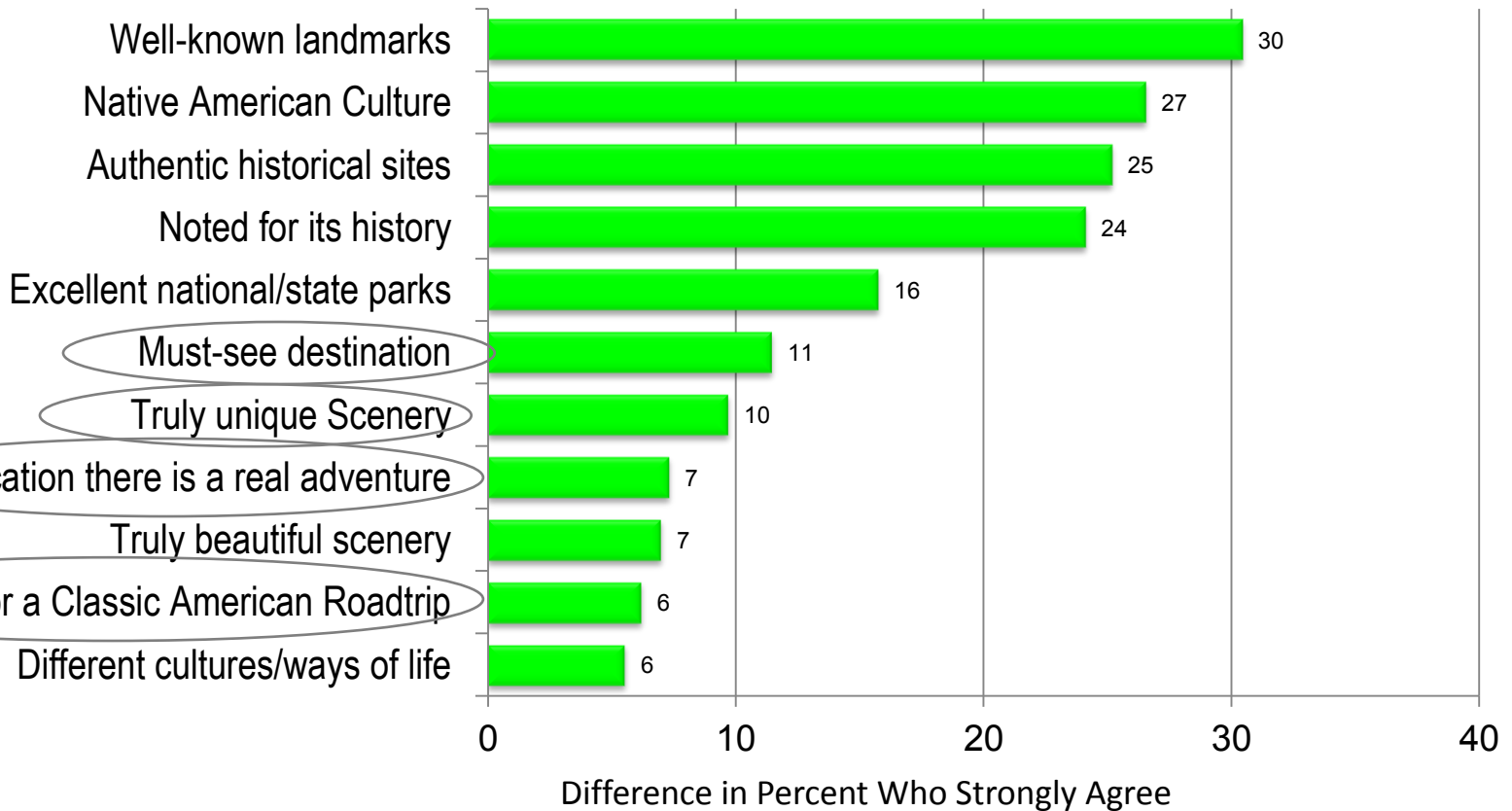
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Strengths vs. Wisconsin



Base: Residents of South Dakota's Regional Advertising Markets

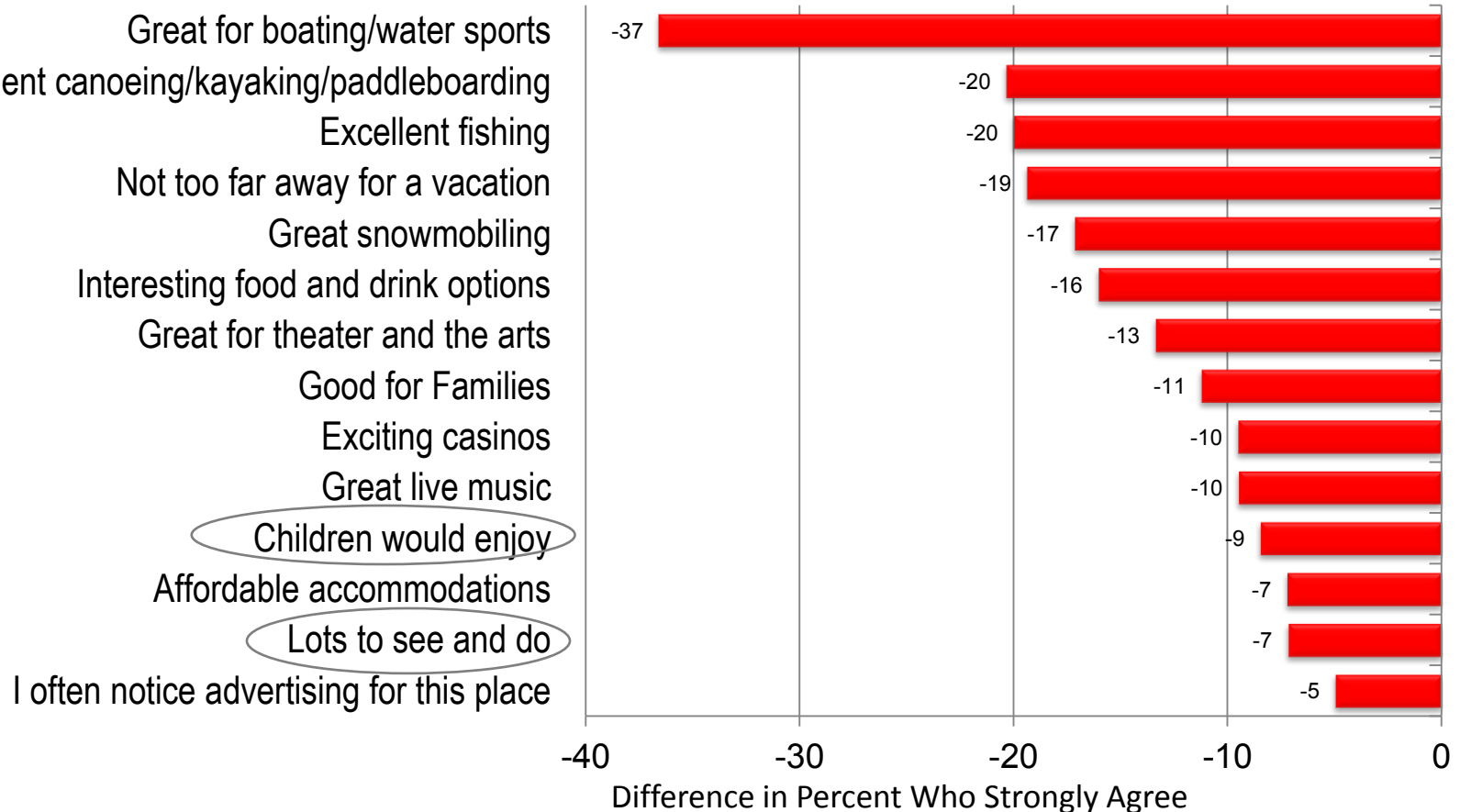


Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. Wisconsin



Base: Residents of South Dakota's Regional Advertising Markets

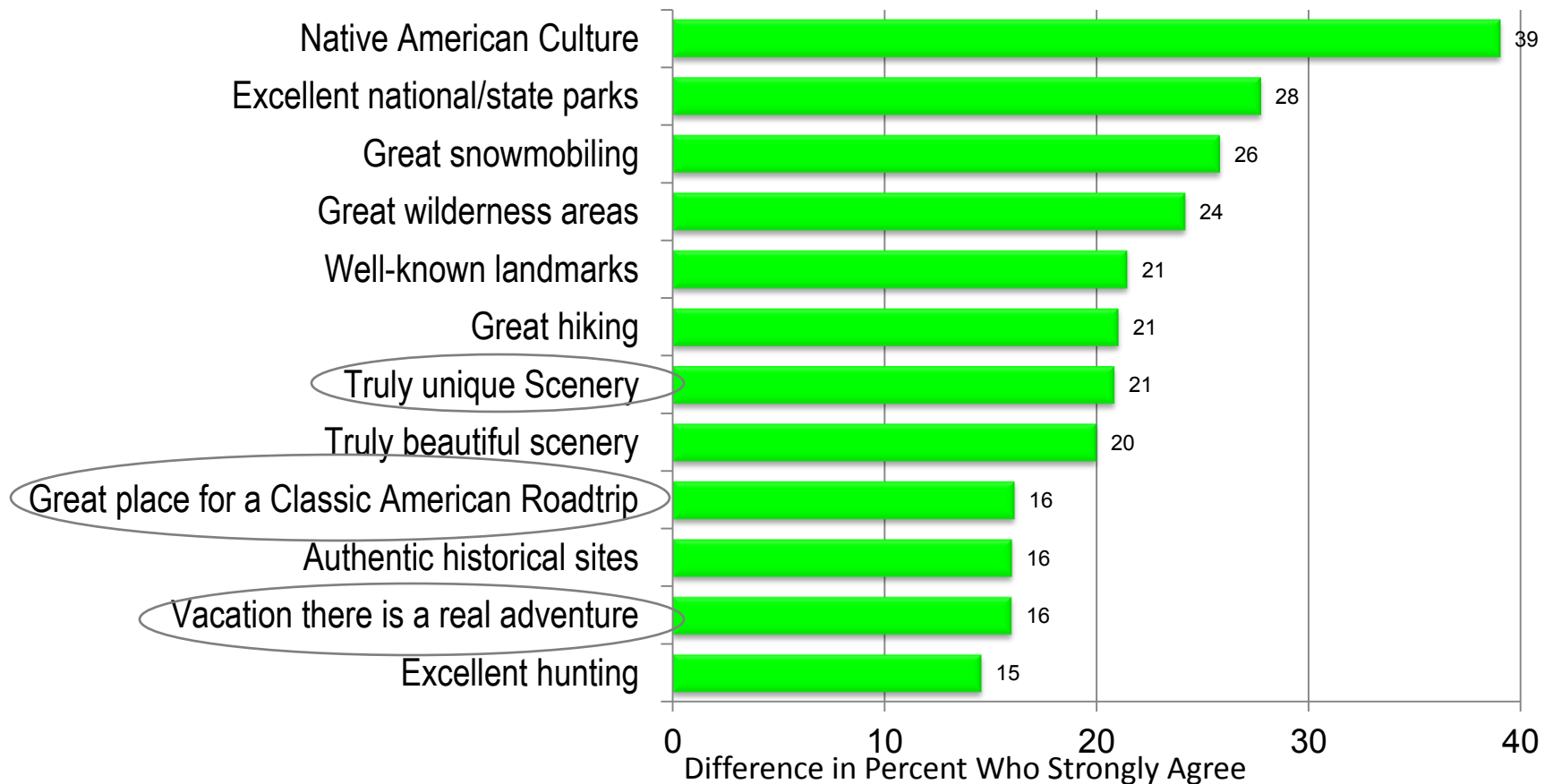


Circled attributes are image hot buttons

South Dakota's Image Strengths vs. Missouri



Base: Residents of South Dakota's Regional Advertising Markets

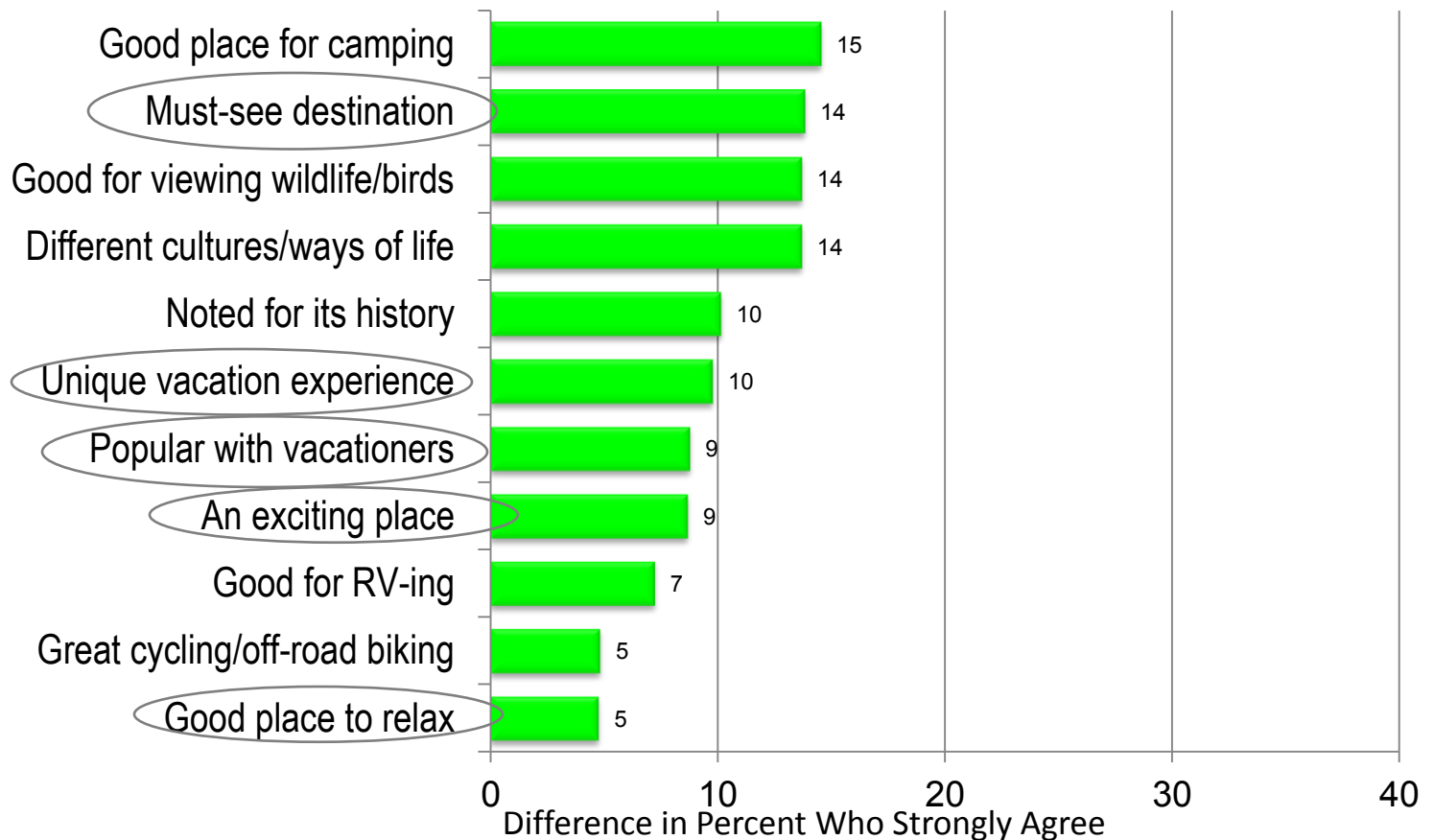


Circled attributes are image hot buttons

South Dakota's Image Strengths vs. Missouri (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets

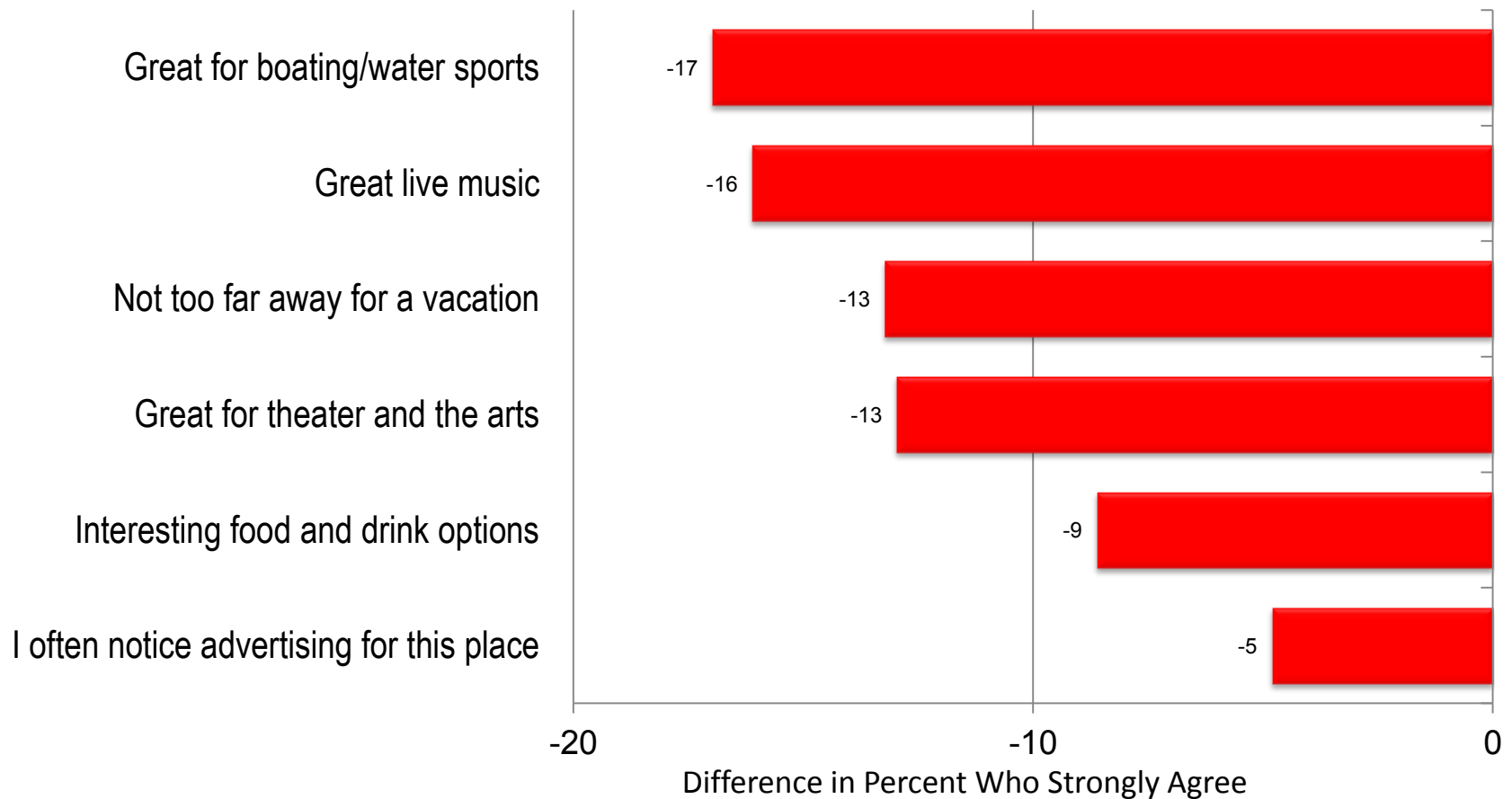


Circled attributes are image hot buttons

South Dakota's Image Weaknesses vs. Missouri



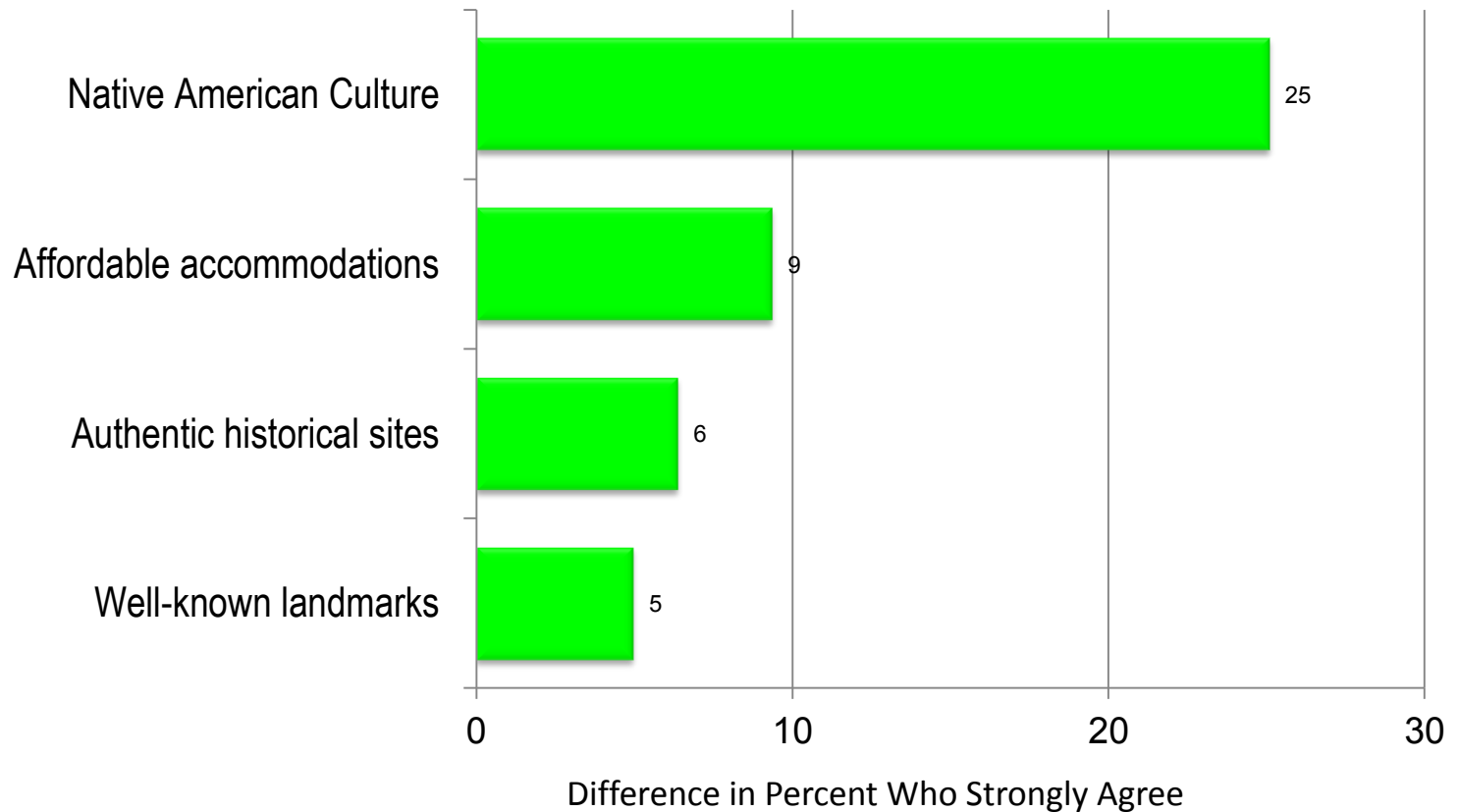
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Strengths vs. Colorado



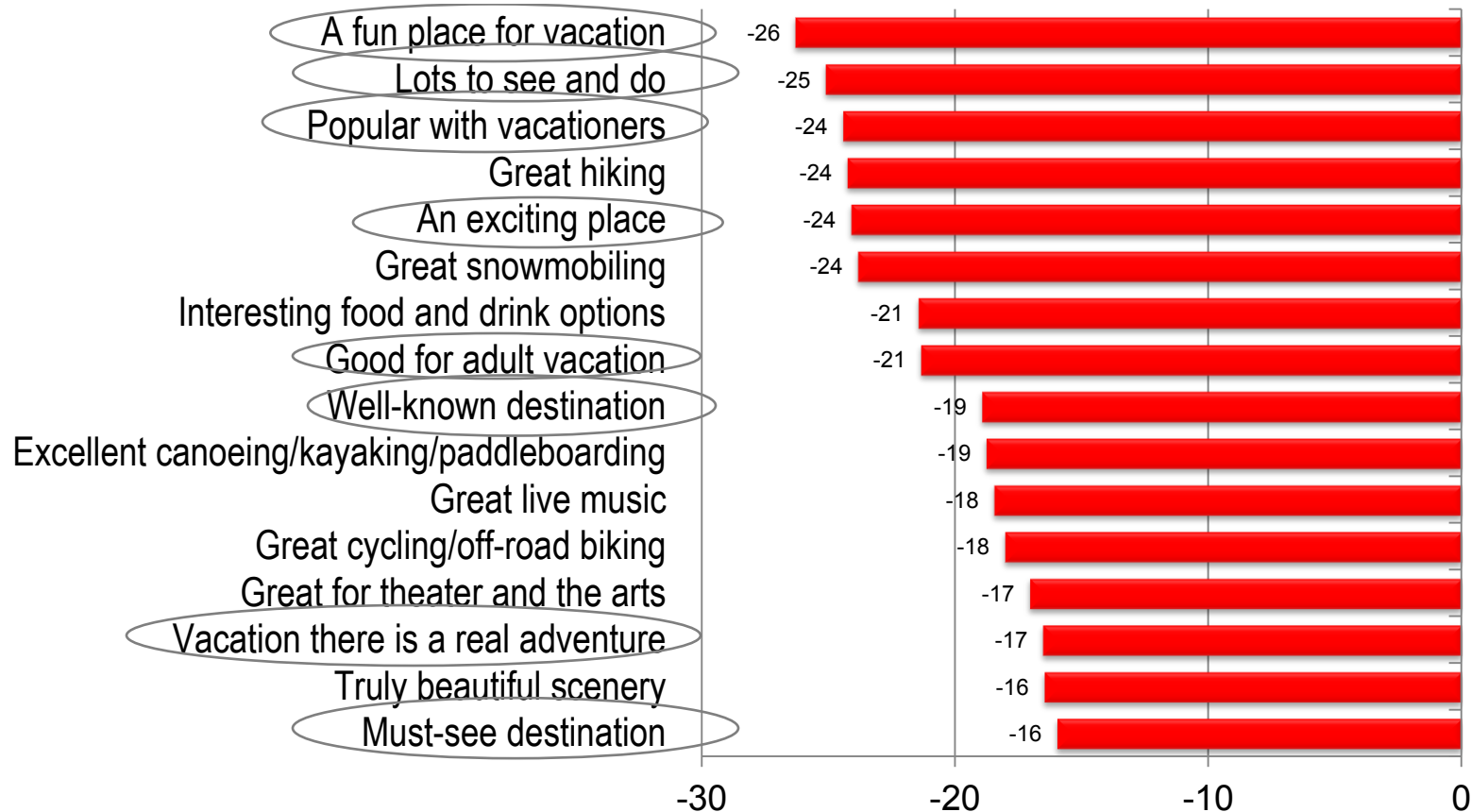
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Weaknesses vs. Colorado



Base: Residents of South Dakota's Regional Advertising Markets



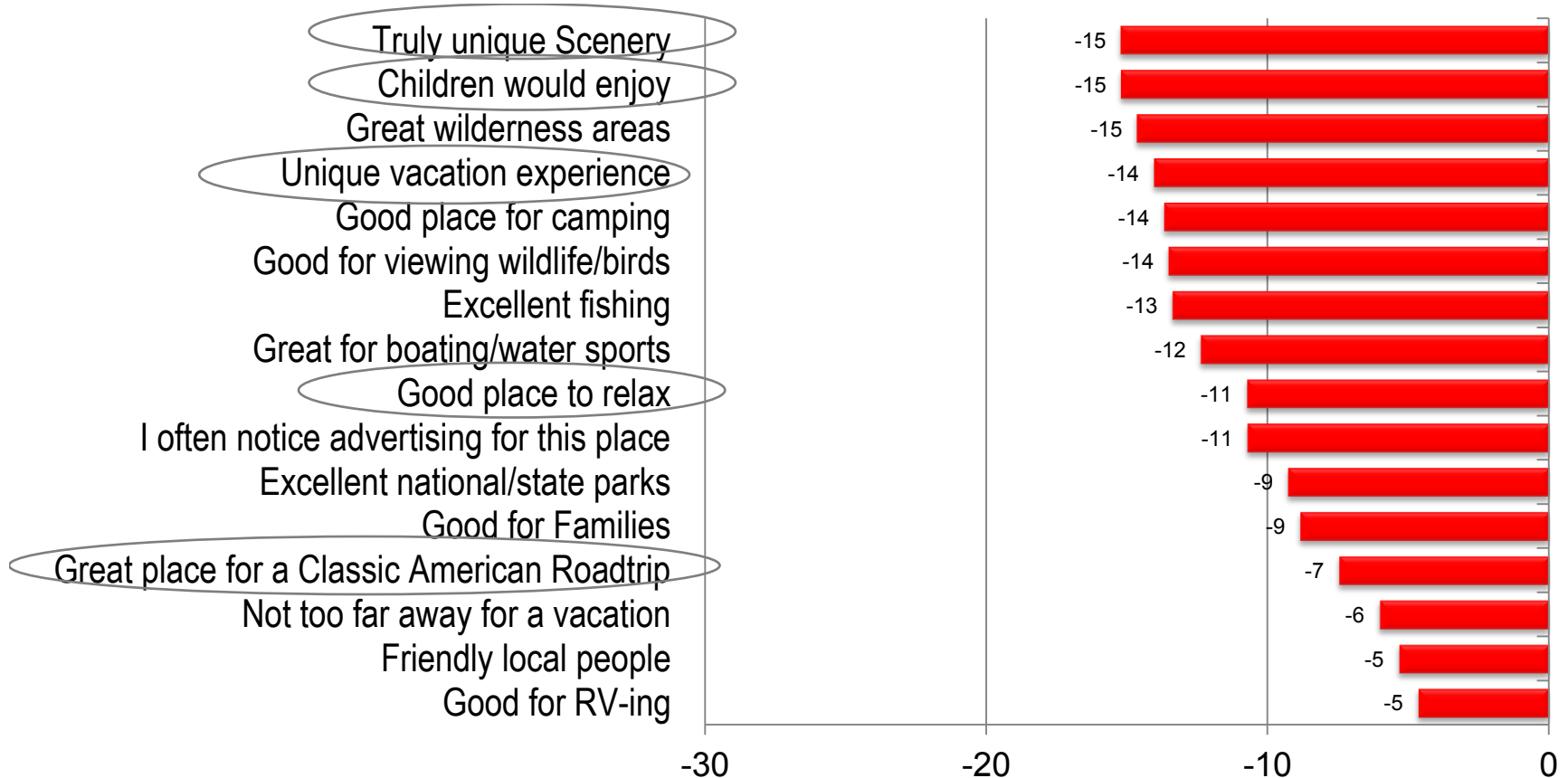
Circled attributes are image hot buttons

Difference in Percent Who Strongly Agree

South Dakota's Image Weaknesses vs. Colorado (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets



Circled attributes are image hot buttons

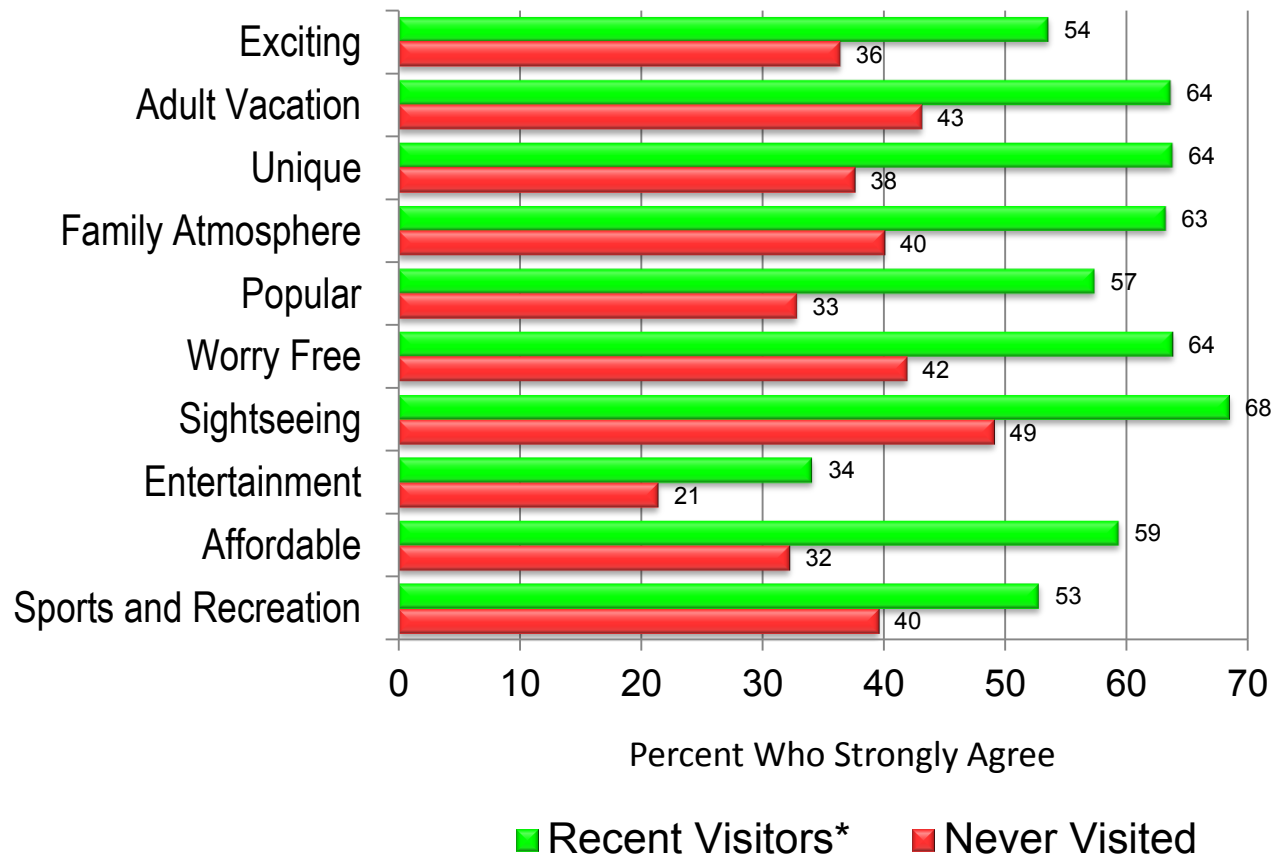
Difference in Percent Who Strongly Agree

South Dakota's Product Delivery

South Dakota's Product vs. Image



Base: Residents of South Dakota's Regional Advertising Markets

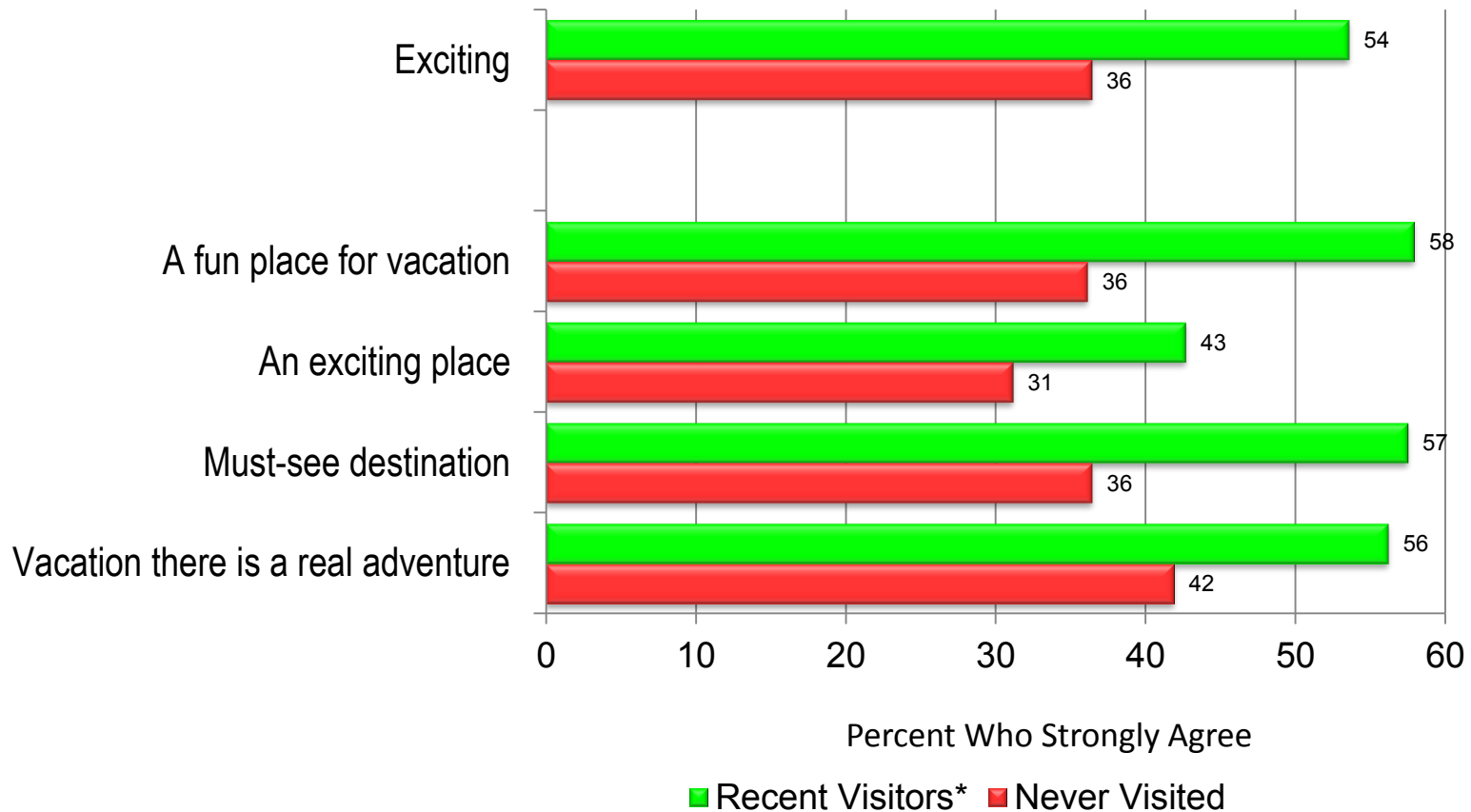


* Visited in past two years

South Dakota's Product Delivery vs. Image — Exciting



Base: Residents of South Dakota's Regional Advertising Markets

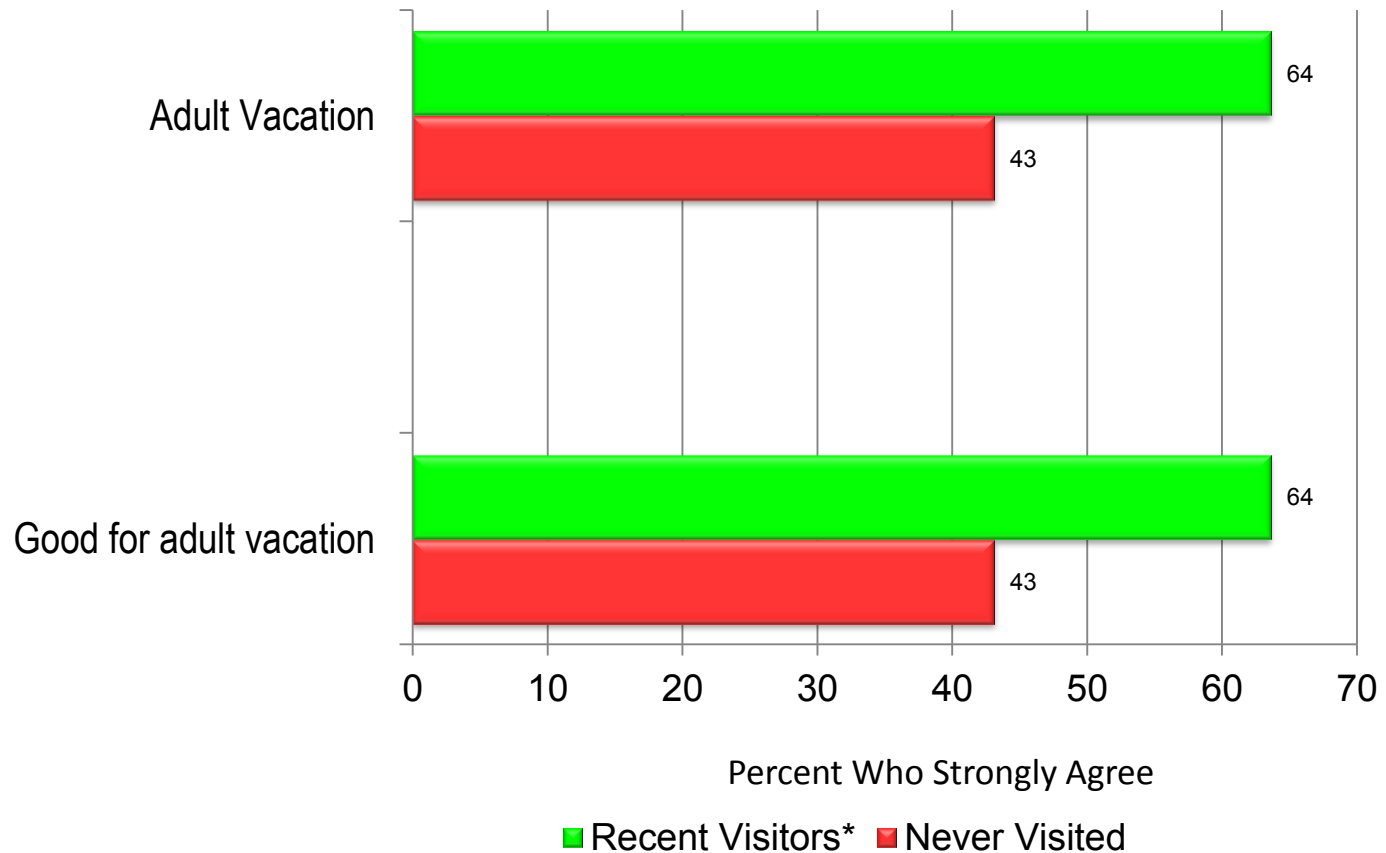


* Visited in past two years

South Dakota's Product Delivery vs. Image — Adult Vacation



Base: Residents of South Dakota's Regional Advertising Markets

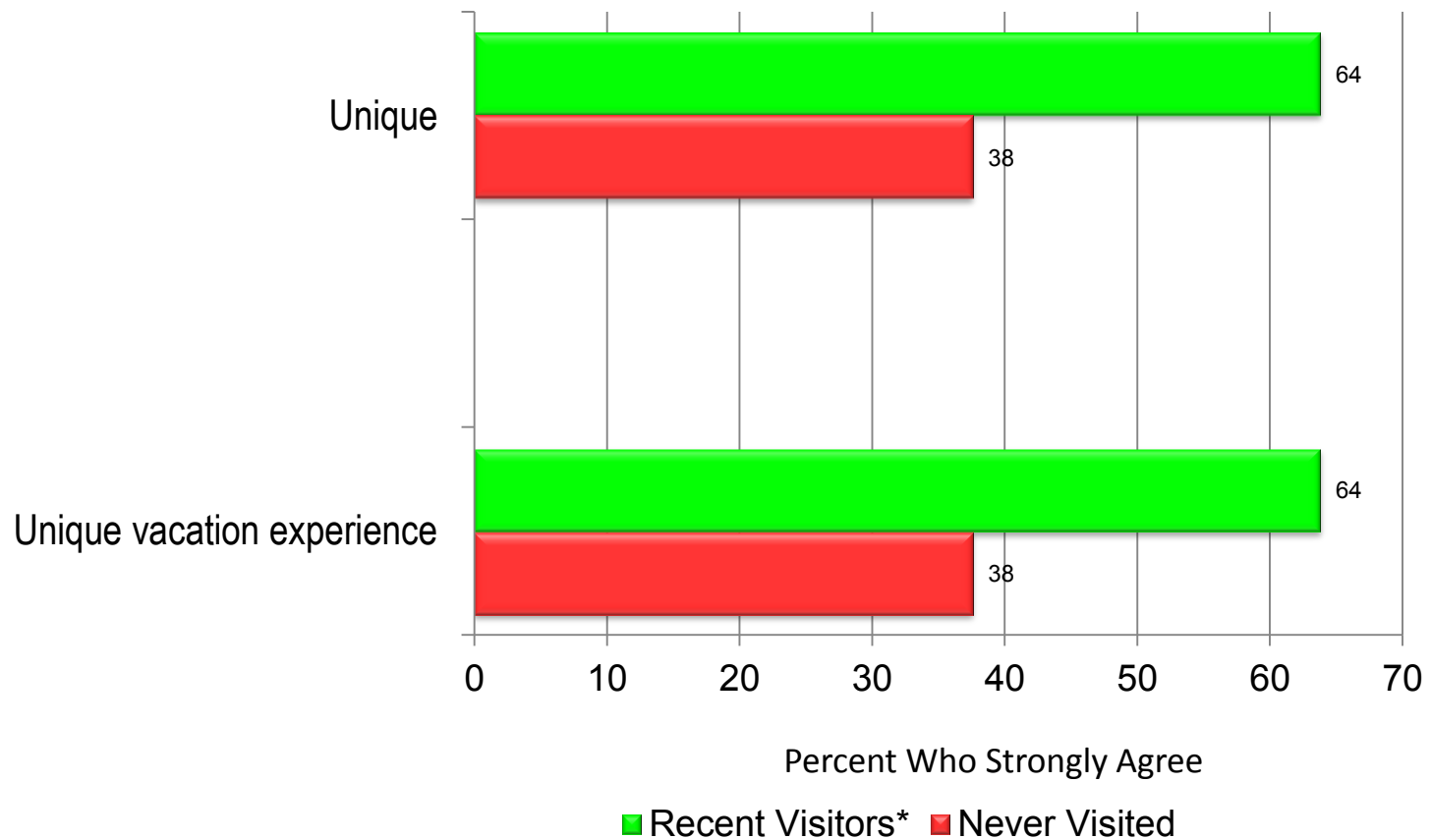


* Visited in past two years

South Dakota's Product Delivery vs. Image — Unique



Base: Residents of South Dakota's Regional Advertising Markets



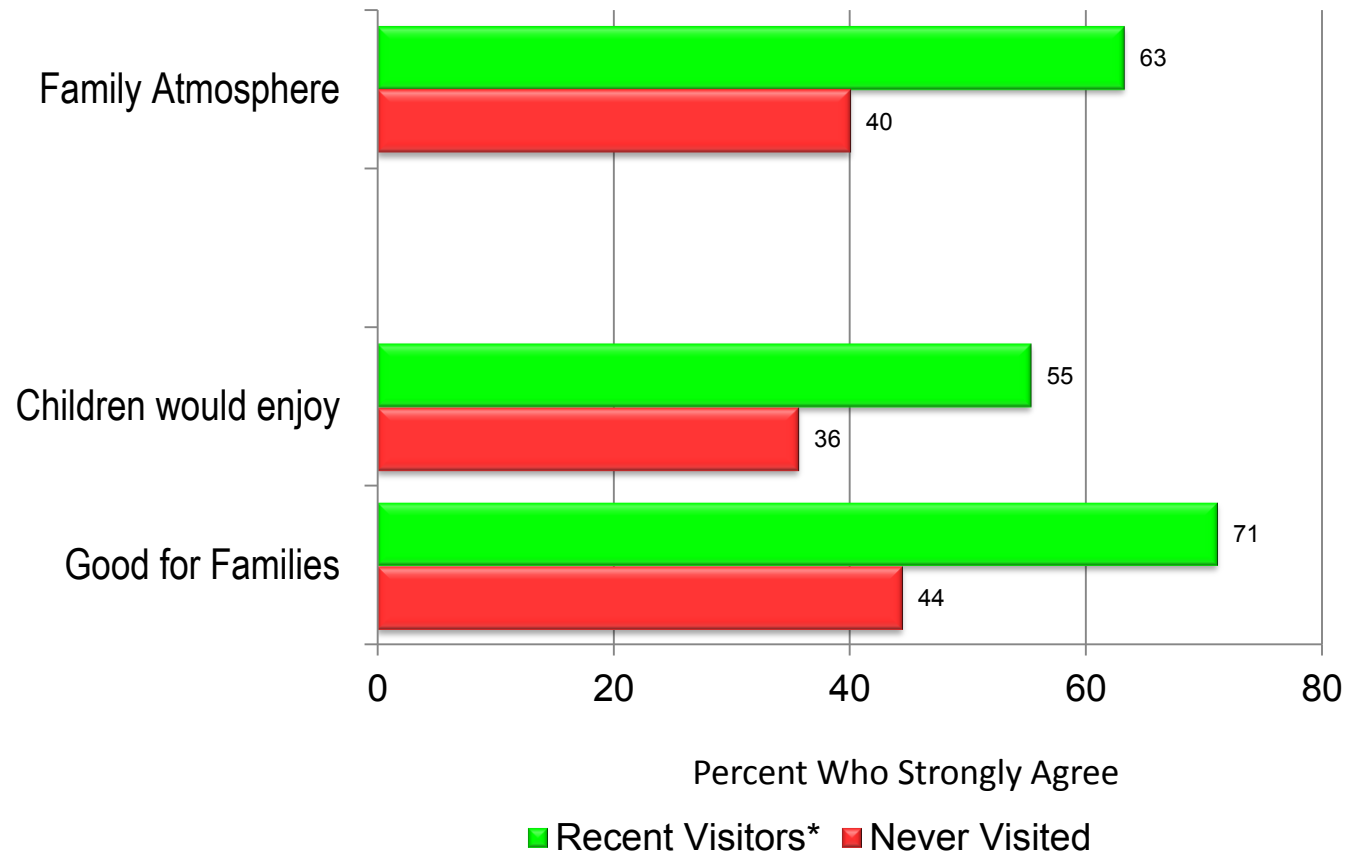
* Visited in past two years

South Dakota's Product Delivery vs. Image

— Family Atmosphere



Base: Residents of South Dakota's Regional Advertising Markets

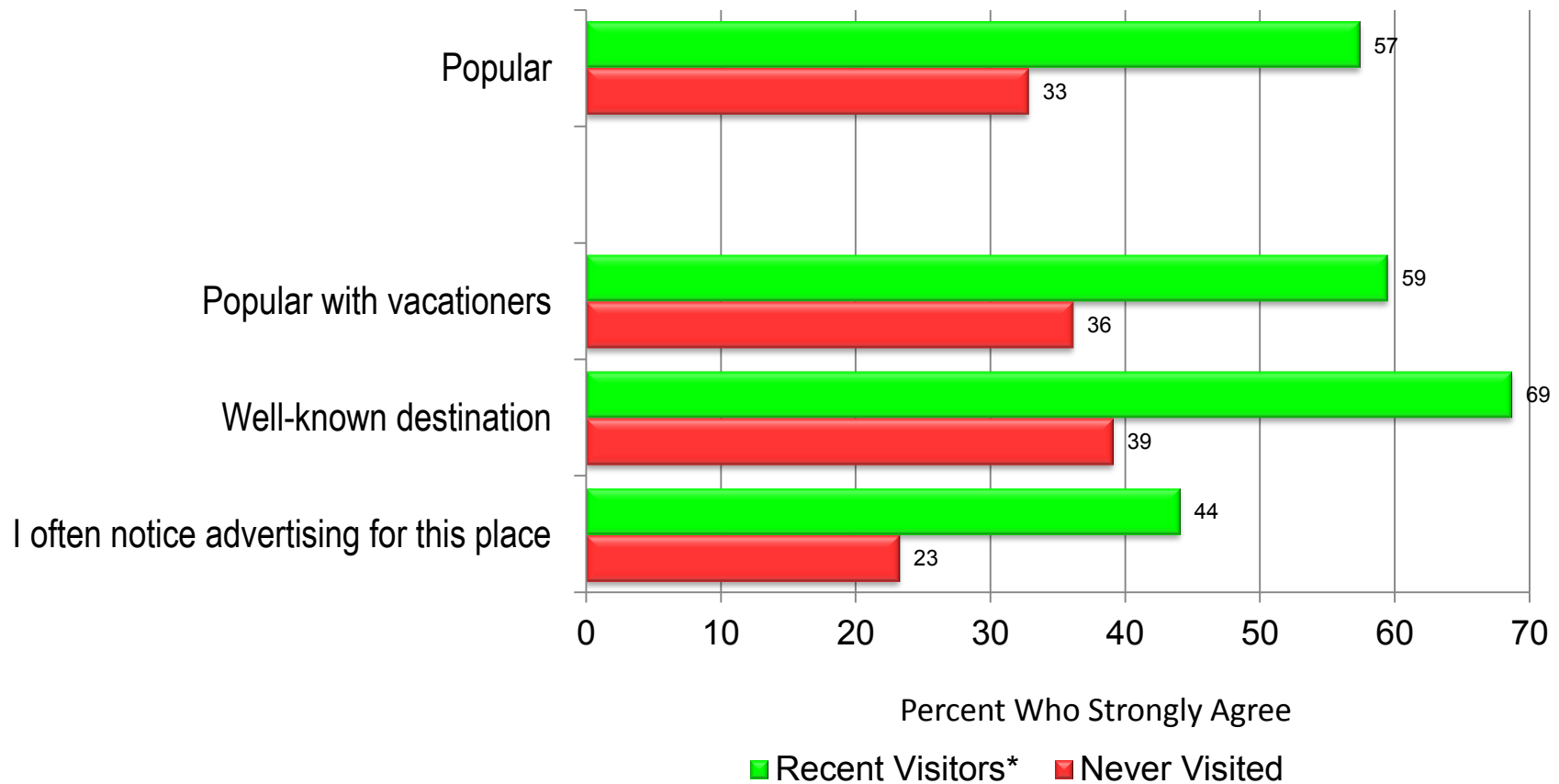


* Visited in past two years

South Dakota's Product Delivery vs. Image — Popular



Base: Residents of South Dakota's Regional Advertising Markets

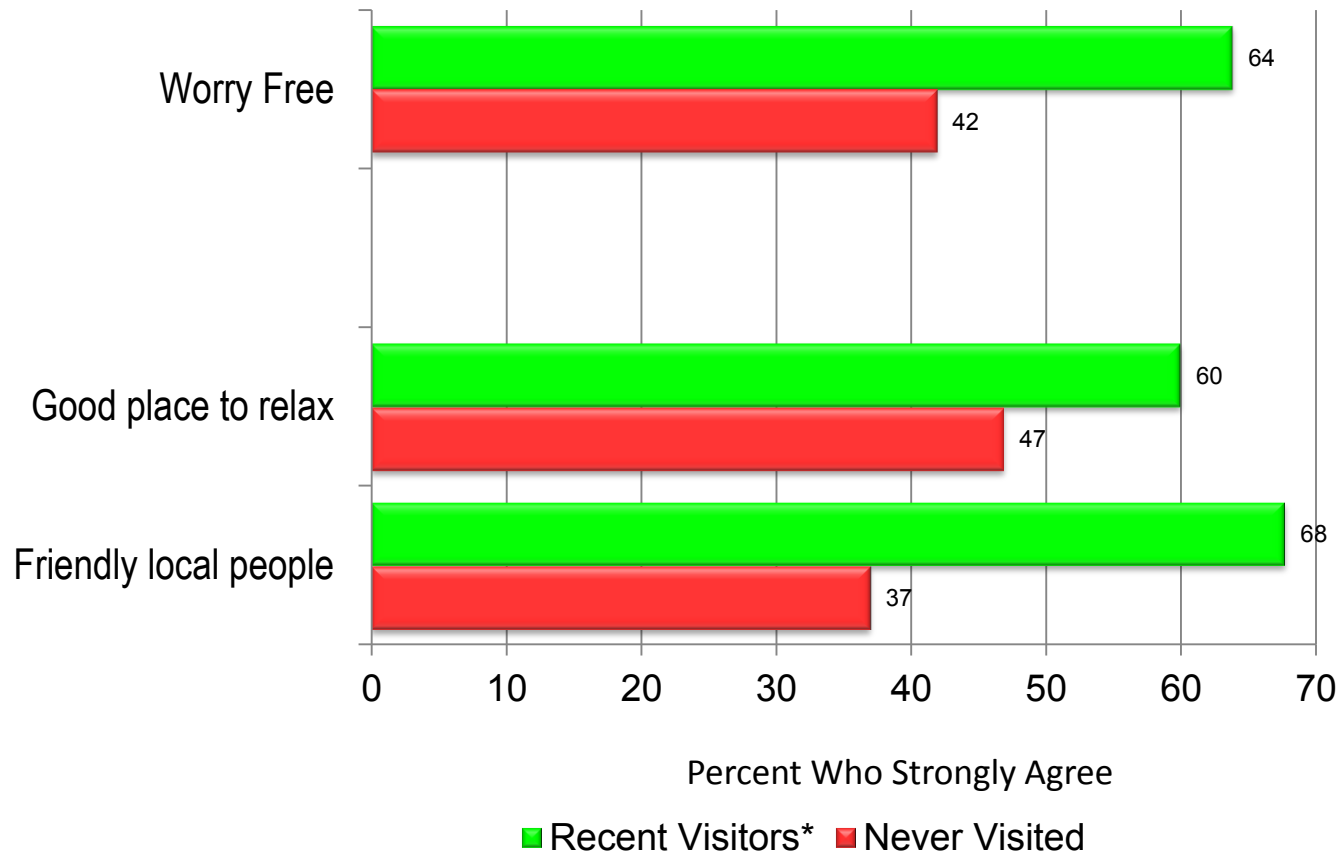


* Visited in past two years

South Dakota's Product Delivery vs. Image — Worry Free



Base: Residents of South Dakota's Regional Advertising Markets

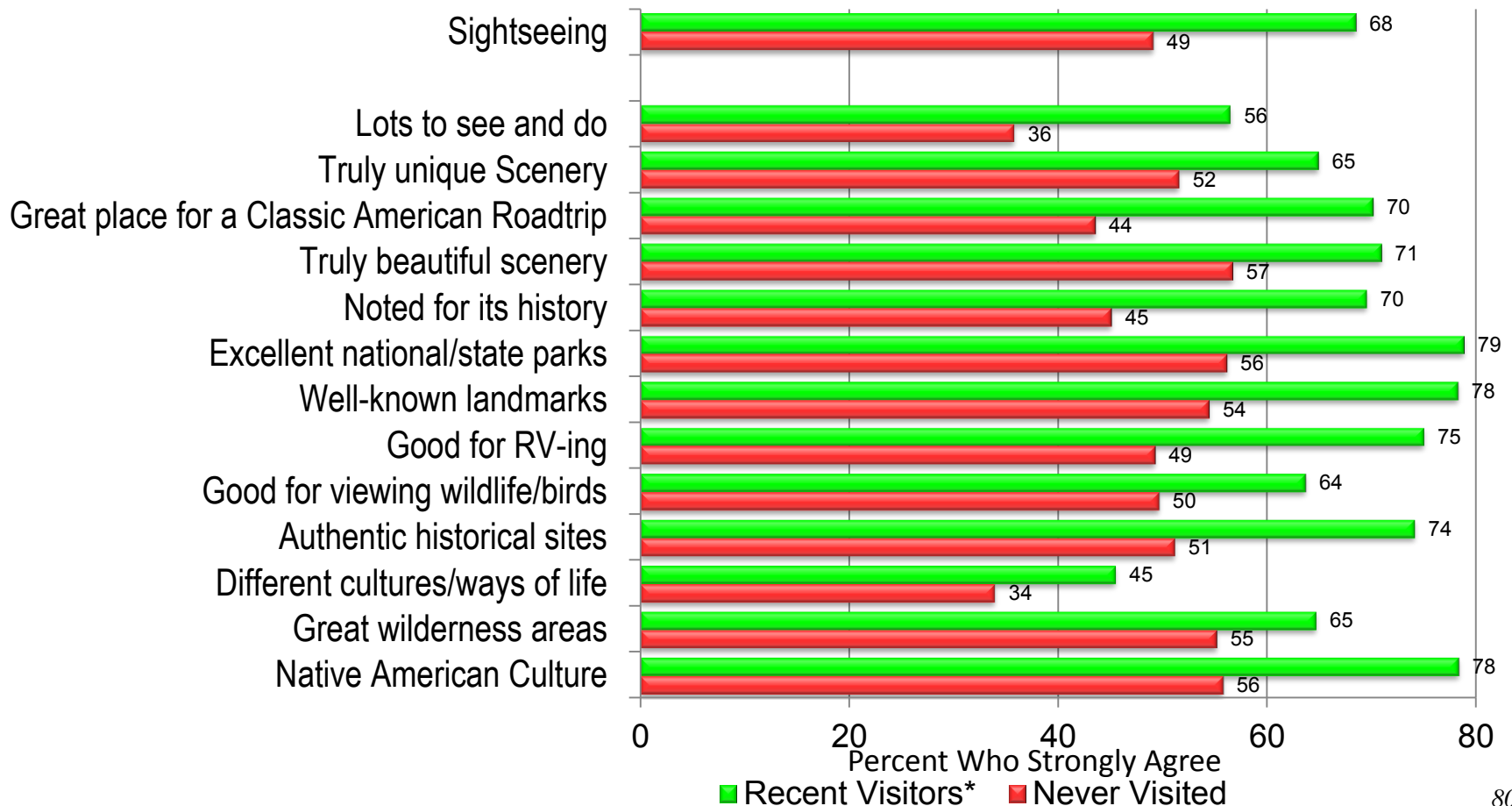


* Visited in past two years

South Dakota's Product Delivery vs. Image — Sightseeing



Base: Residents of South Dakota's Regional Advertising Markets

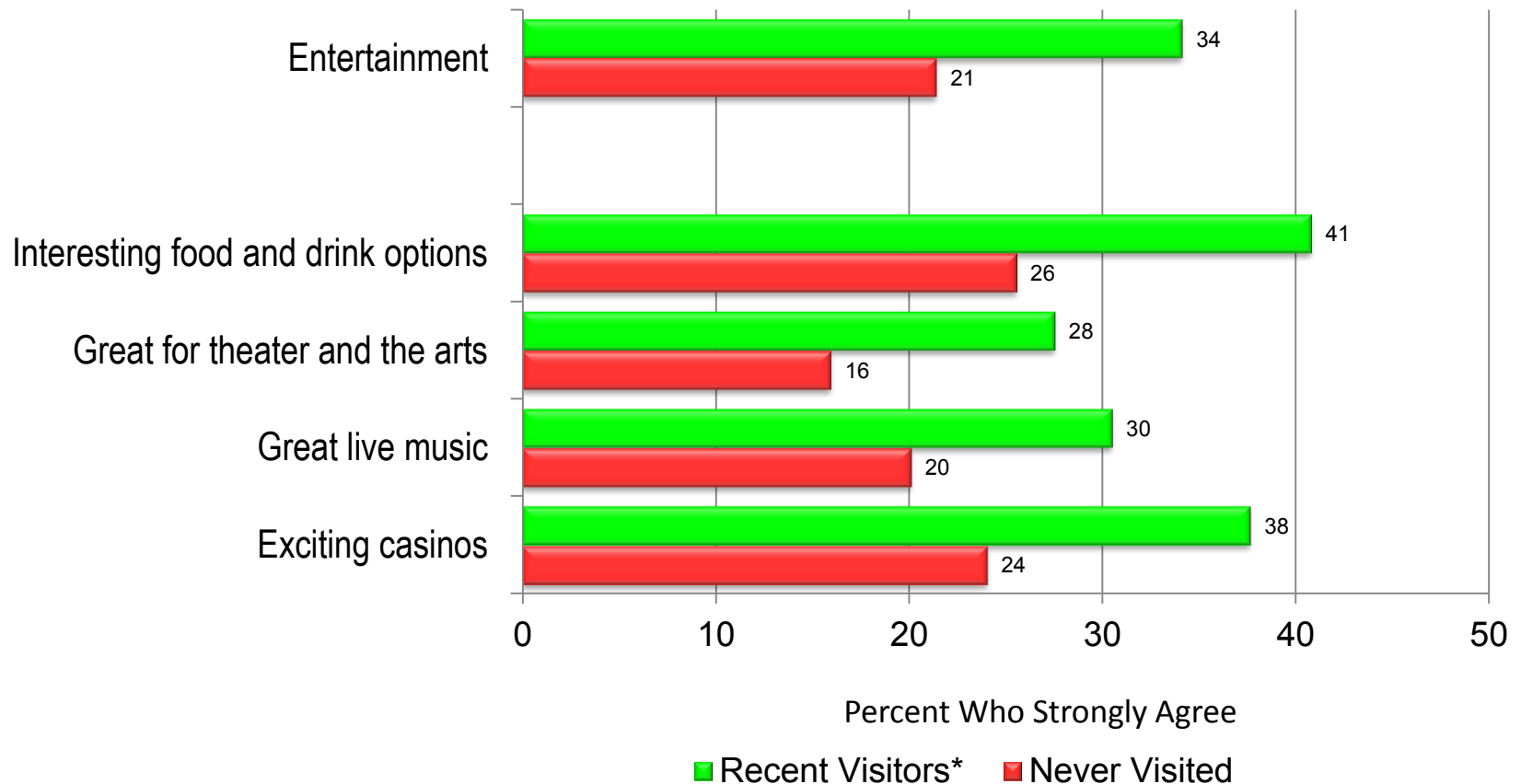


* Visited in past two years

South Dakota's Product Delivery vs. Image — Entertainment



Base: Residents of South Dakota's Regional Advertising Markets

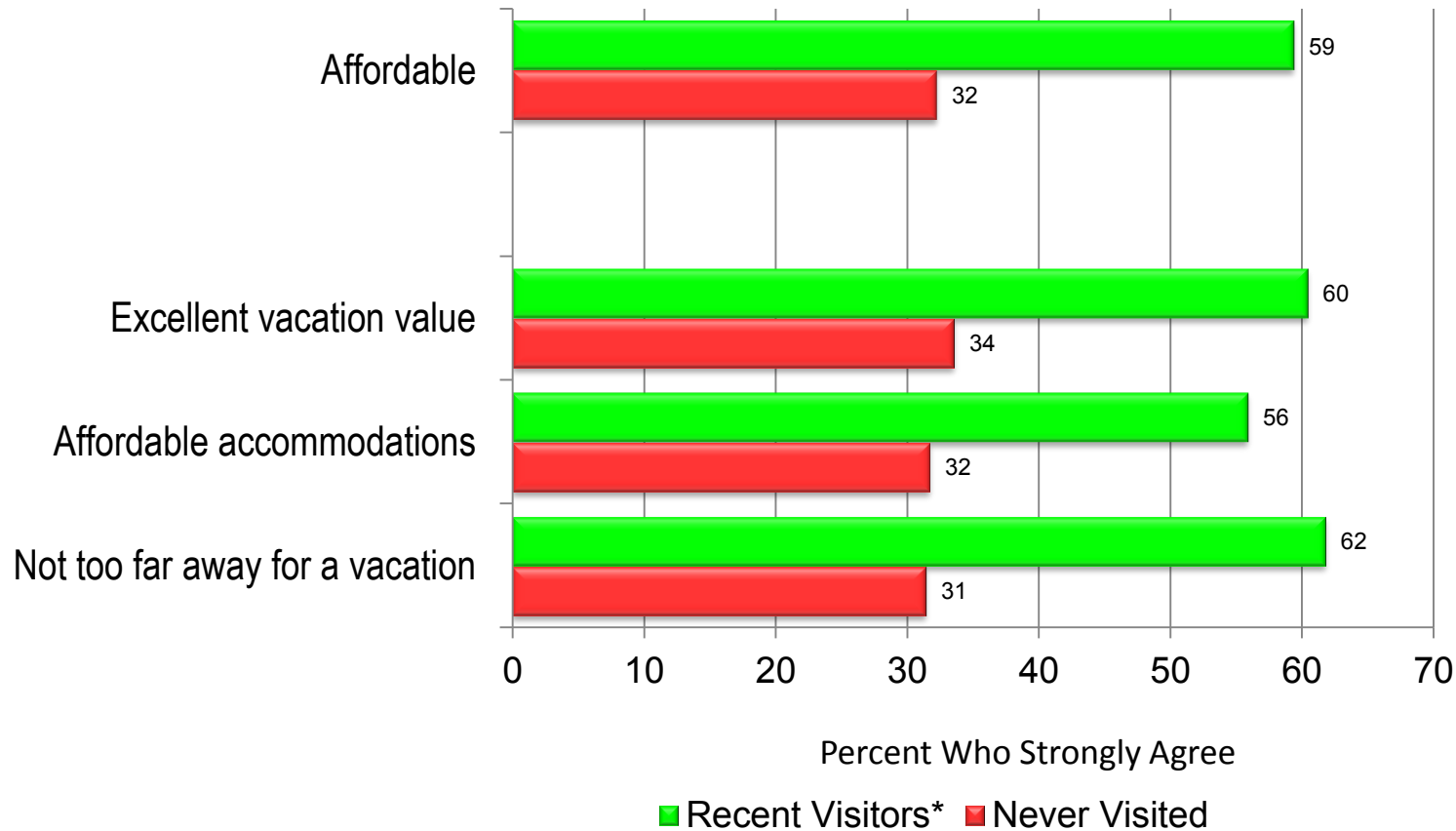


* Visited in past two years

South Dakota's Product Delivery vs. Image — Affordable



Base: Residents of South Dakota's Regional Advertising Markets



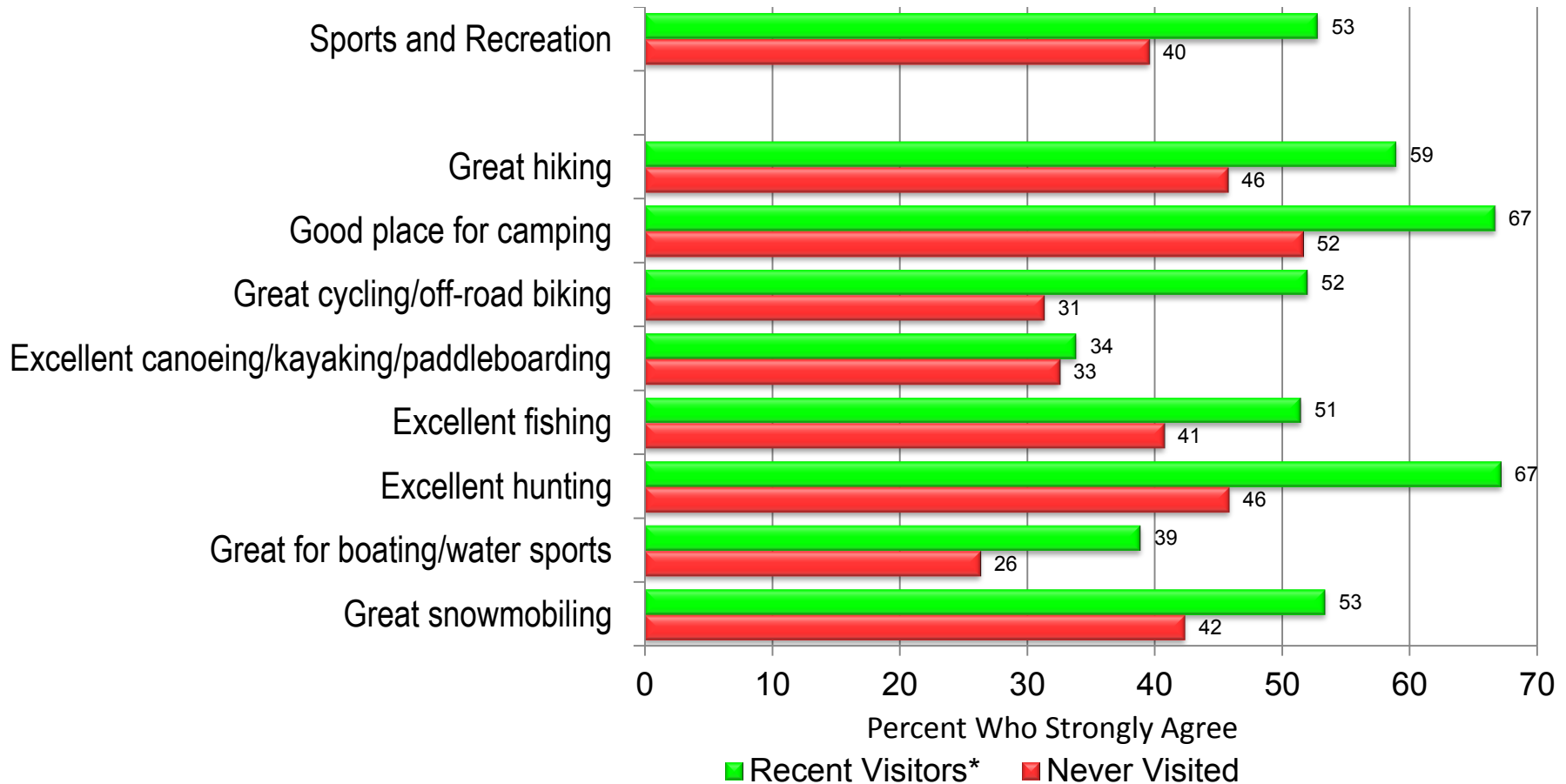
* Visited in past two years

South Dakota's Product Delivery vs. Image

— Sports and Recreation



Base: Residents of South Dakota's Regional Advertising Markets

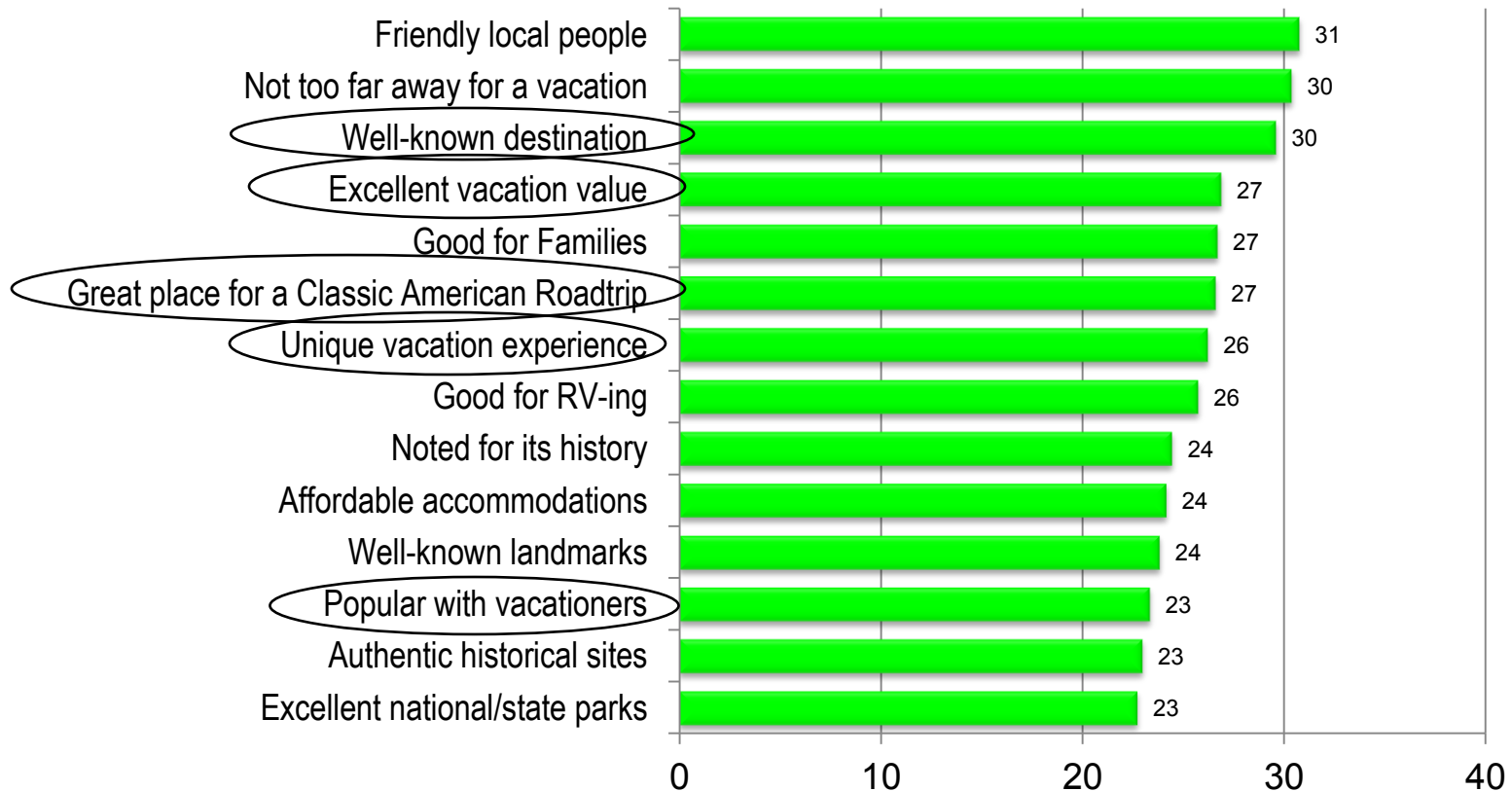


* Visited in past two years

South Dakota's Main Product Strengths vs. Image



Base: Residents of South Dakota's Regional Advertising Markets



Difference in % Who Strongly Agree – Recent vs. Non-visitors

Circled attributes are image hot buttons

South Dakota's Main Product Strengths vs. Image (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets

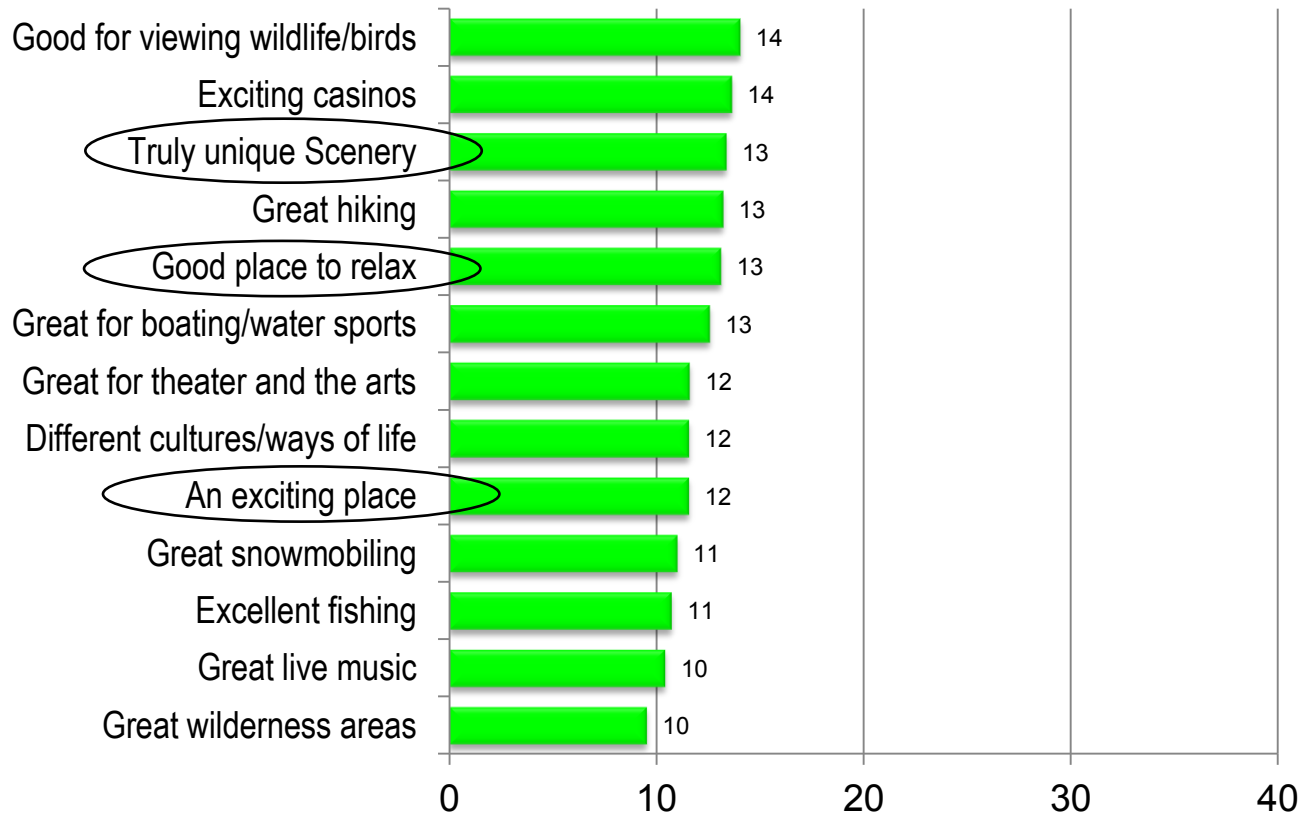


Difference in % Who Strongly Agree – Recent vs. Non-visitors

South Dakota's Main Product Strengths vs. Image (Cont'd)



Base: Residents of South Dakota's Regional Advertising Markets



Difference in % Who Strongly Agree – Recent vs. Non-visitors

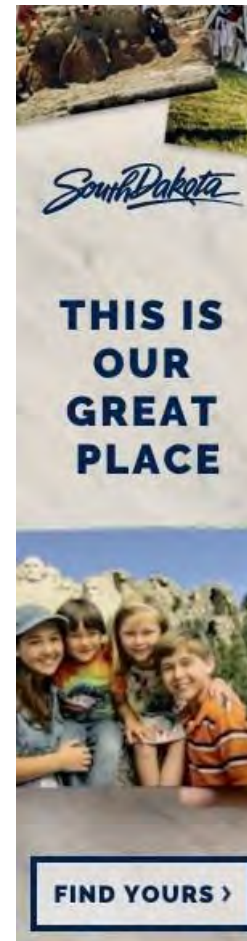
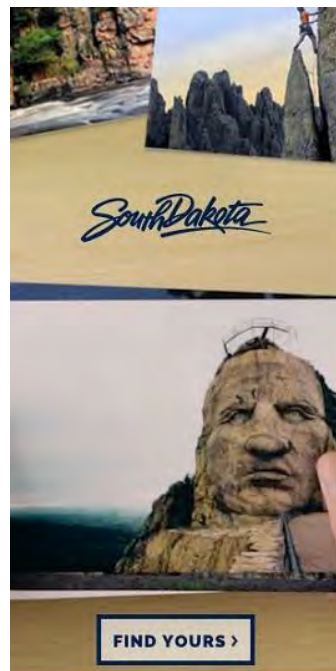
South Dakota's Product Weaknesses vs. Image



**No Product Weaknesses
vs. Image**

Creative

2016 Spring/Summer Ads

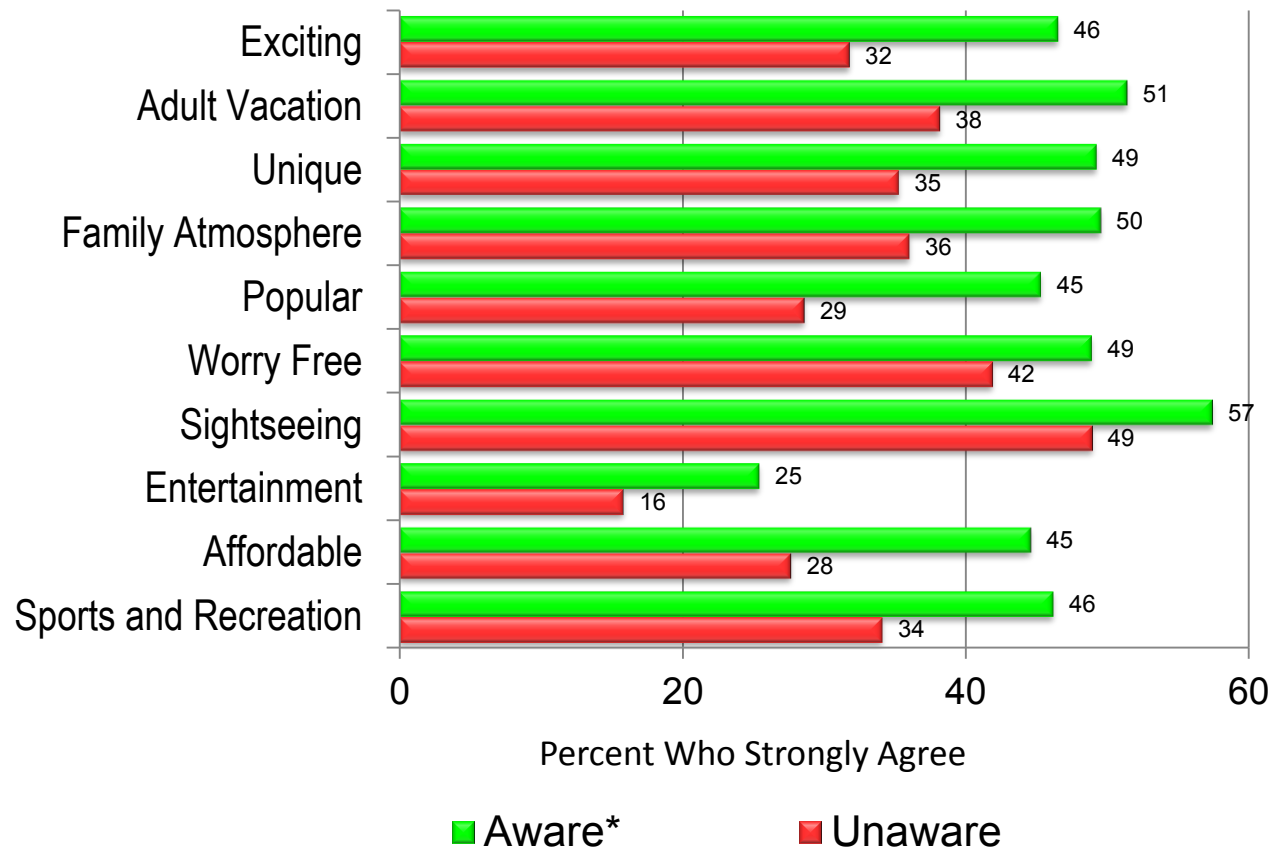


Impact of Advertising on Image

Impact of Advertising on Image – All Advertising Markets



Base: Residents of South Dakota's Regional Advertising Markets

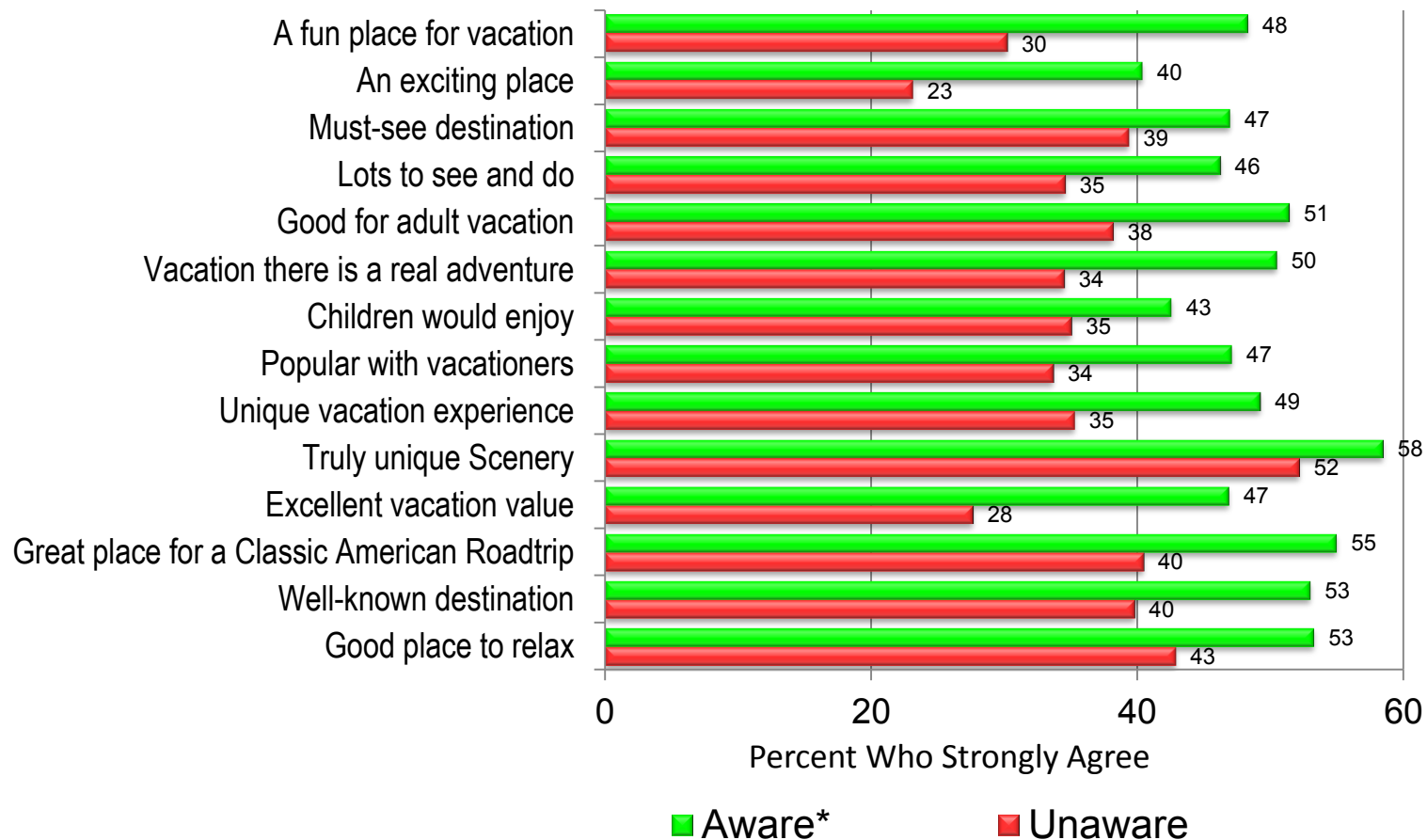


*Saw at least one ad

Impact of Advertising on South Dakota's Hot Buttons



Base: Residents of South Dakota's Regional Advertising Markets



*Saw at least one ad

Bottom Line Advertising Impacts

Advertising Impacts

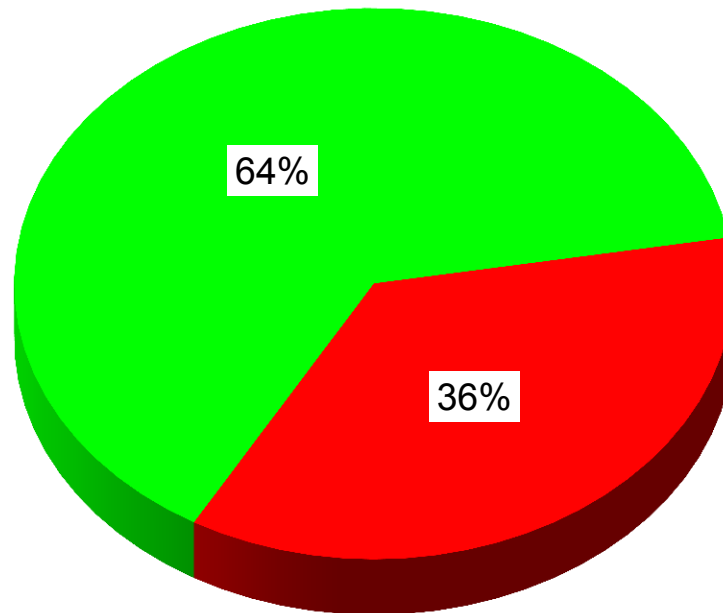


- 64% of all respondents were aware of at least one of Explore South Dakota Tourism's ads.
- Among those who saw South Dakota ads in several types of media, ad recall was highest for Print ads (44%), followed by Digital ads (40%). Among those who only saw ads in one medium, Print ads also had the highest recall (7%), followed by Digital and Out-of-Home, tied at 3%.
- The campaign generated 1.3 million incremental trips that would not otherwise have taken place, which brought \$166.7 million in incremental visitor spending and \$11.9 million in state and local taxes.
- It cost \$2.45 in advertising to generate each incremental trip.
- Every \$1 invested in the South Dakota ad campaign in the evaluated markets generated \$51 in visitor spending and \$4 in tax revenue for the benefit of South Dakota residents.
- In addition to the short-term impacts, we estimate that the advertising has influenced the planning of a further 4 million trips to South Dakota in 2017. Although not all of these trips will happen, we expect that a sizeable proportion will convert, adding significantly to the return on South Dakota's investment in tourism marketing.

Awareness of South Dakota's 2016 Advertising

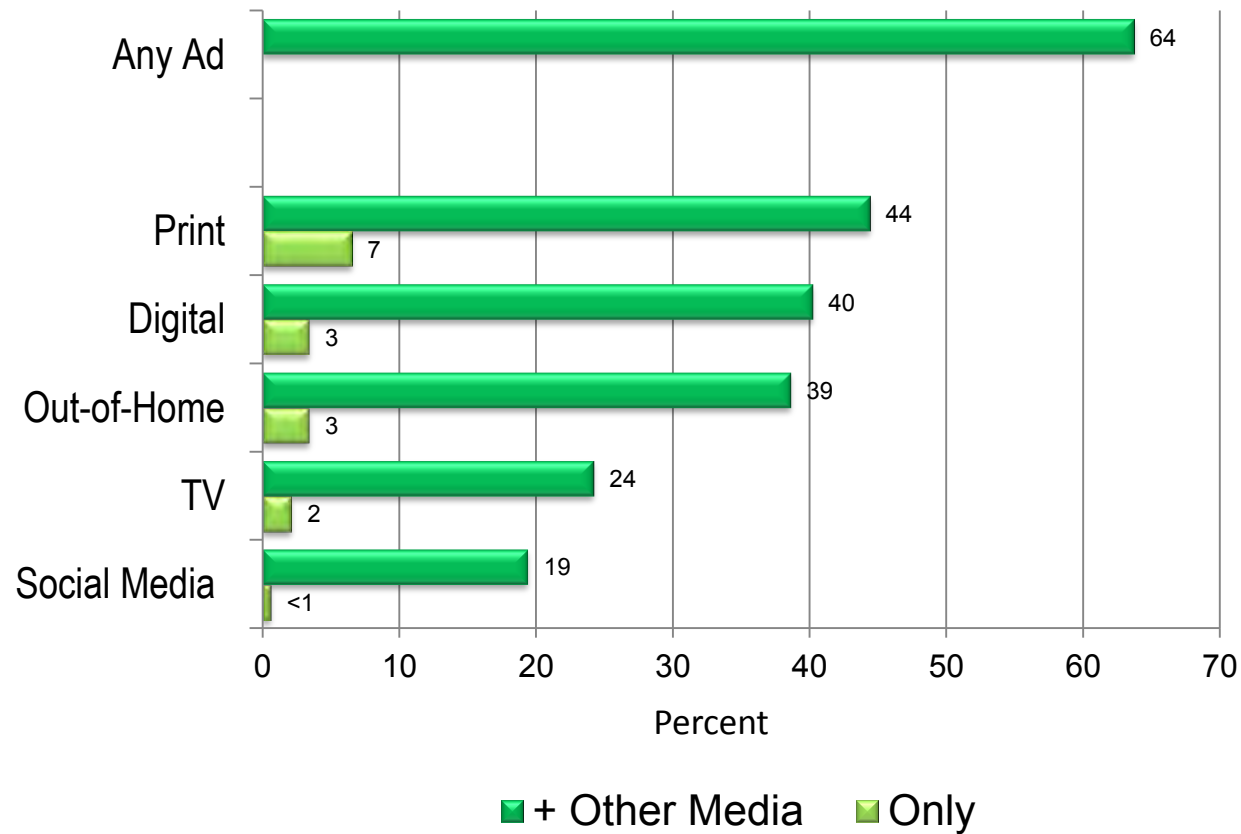


Base: South Dakota's Advertising Markets



■ Aware ■ Unaware

Awareness by Media



Incremental Trips, Spending and Taxes Due to Advertising



	2016 Ad Campaign
Ad Investment	\$ 3.2M
Incremental Trips	1.3M
Incremental Visitor Spending	\$ 166.7M
Incremental Taxes	\$ 11.9M

- Ad Investment excludes Production/Other Costs
- Effective state & local tax rate developed from 2016 SD TSA Analysis: 7.15%

Campaign Efficiency



	2016 Ad Campaign
Ad \$'s per Trip	\$2.45
Trips per Ad \$	0.4

The Bottom Line in 2016



	2016 Ad Campaign
Spending ROI	\$51
Tax ROI	\$4

Longer-term Impact of Advertising

– Intent to Visit South Dakota



Intend to Visit South Dakota in Next 12 Months*	
Overnight Trip Intenders	2.3M
Day Trip Intenders	1.7M
Total Intenders	4.0M

* Among those who did not visit South Dakota in 2016



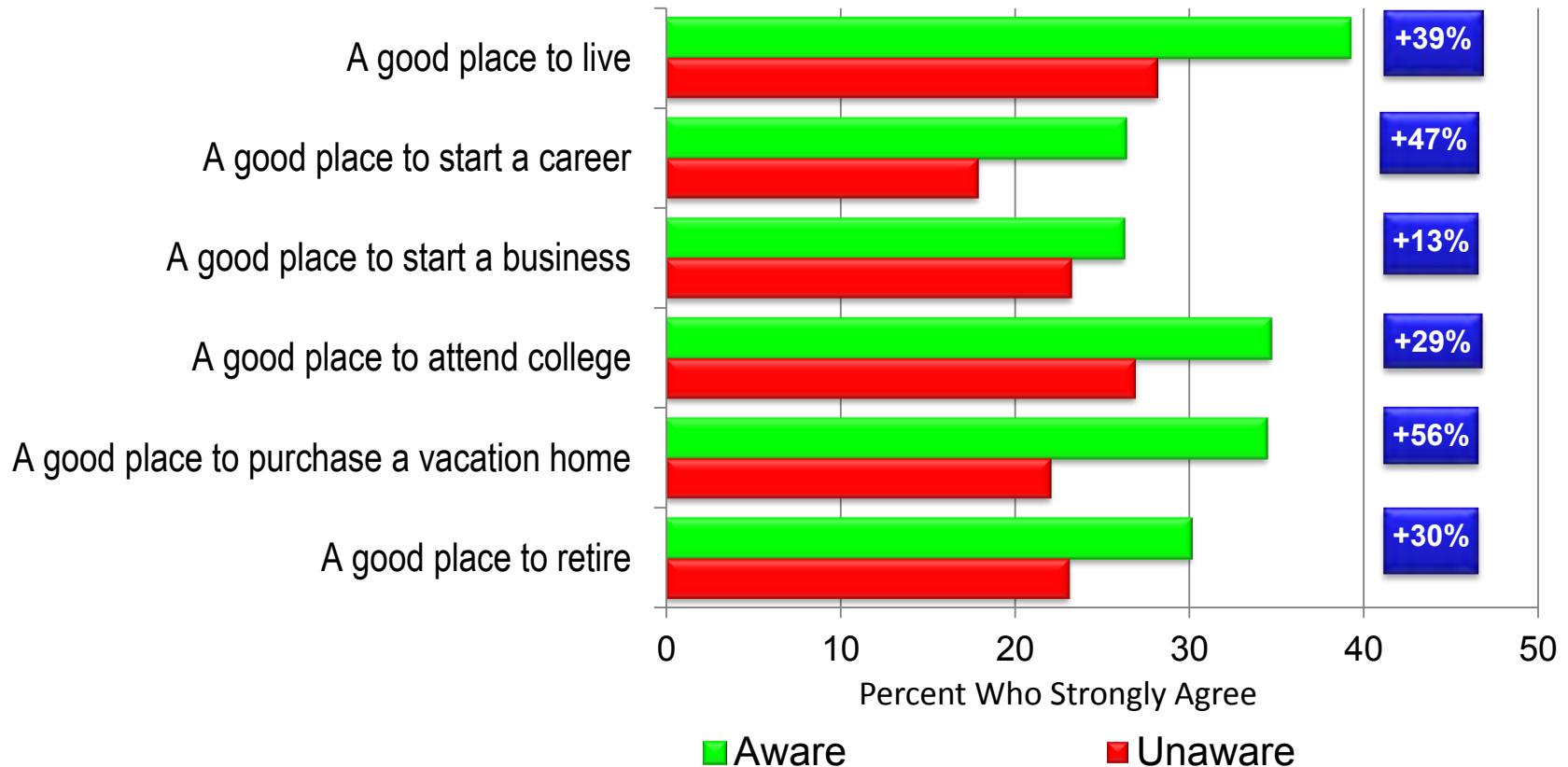
2016 Tourism Advertising Halo Effect

South Dakota's "Halo Effect"



- ◉ The following analysis takes the psychological concept of the “halo effect”, which posits that “our judgements of a person’s character can be influenced by our overall impression of them” and applies it to tourism promotion advertising.
- ◉ There is significant evidence that the gains in image from South Dakota’s tourism advertising extend beyond South Dakota’s image as a place to visit to other areas, such as a place to live, do business, attend college and retire.
- ◉ South Dakota’s success in attracting visitors to the state has a direct benefit for the state’s economic development objectives.

Impact of South Dakota's 2016 Tourism Campaign on State's Economic Development Image



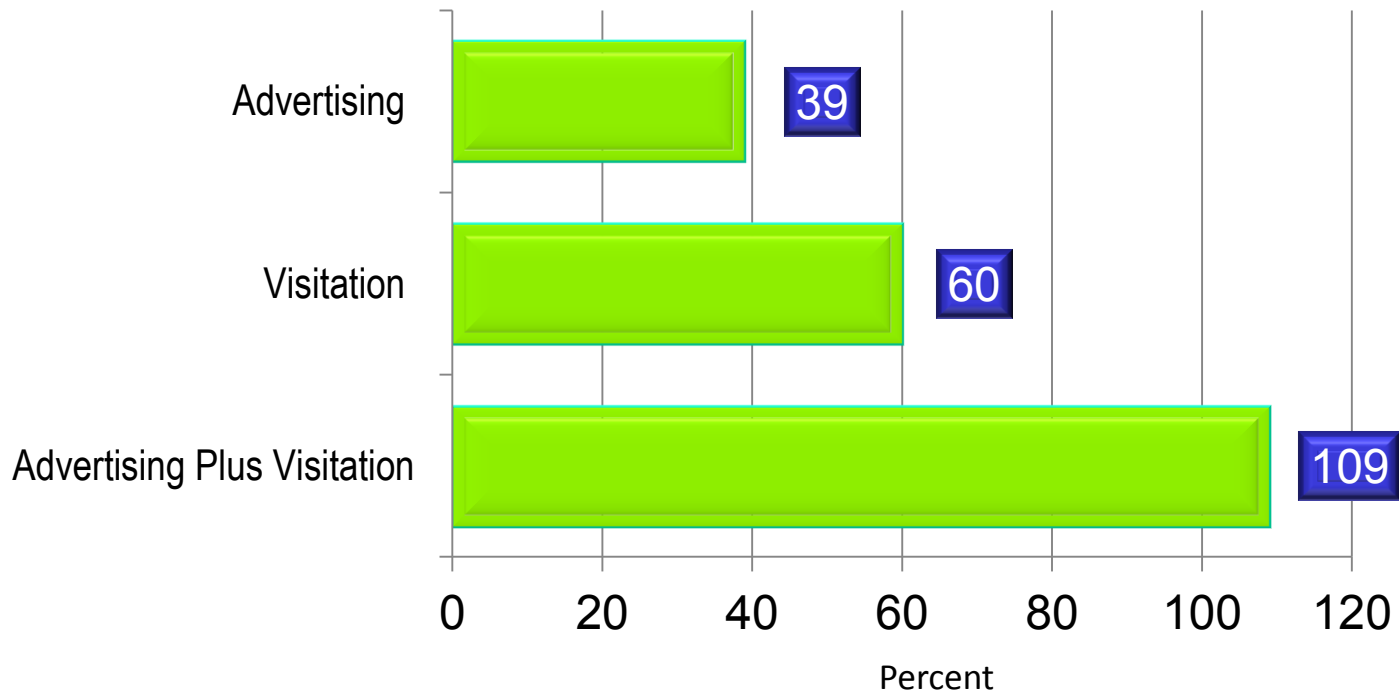
Impact of *Visitation* on South Dakota's Economic Development Image



A Good Place to Live



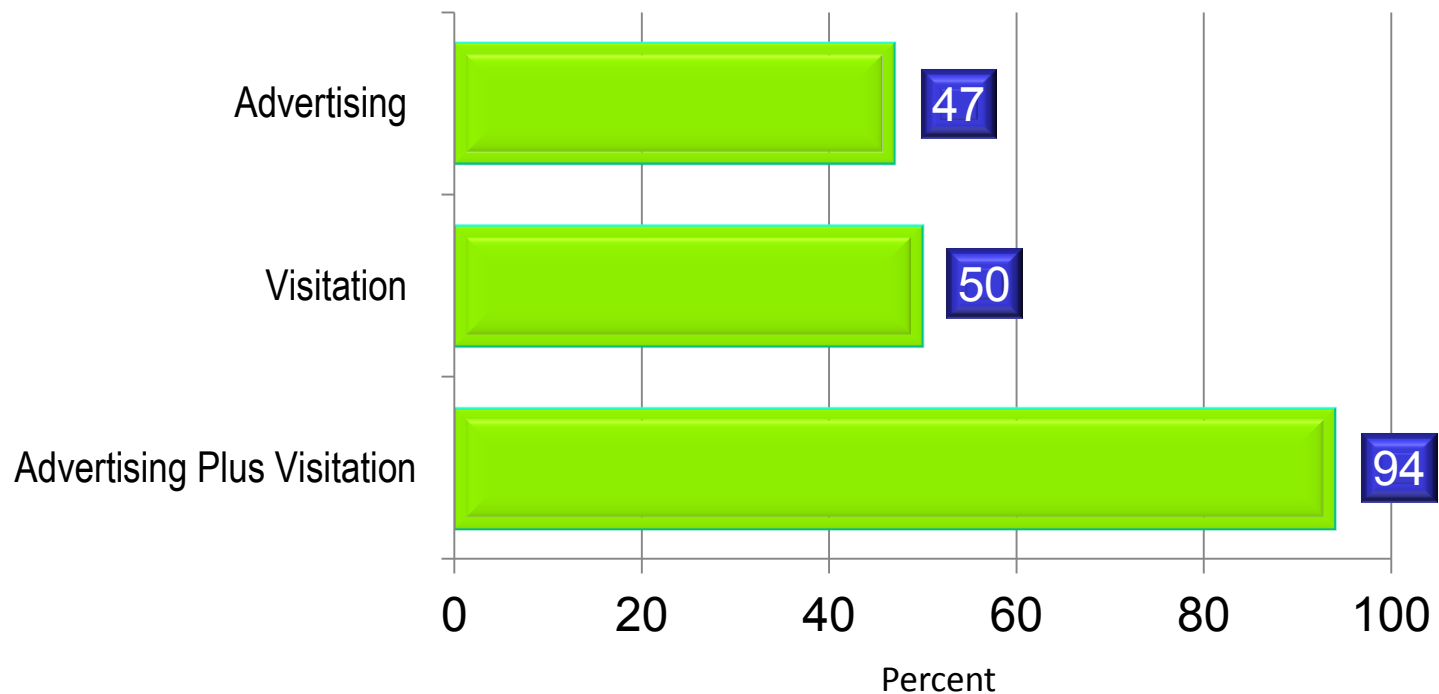
% Image Lift for South Dakota



A Good Place to Start a Career



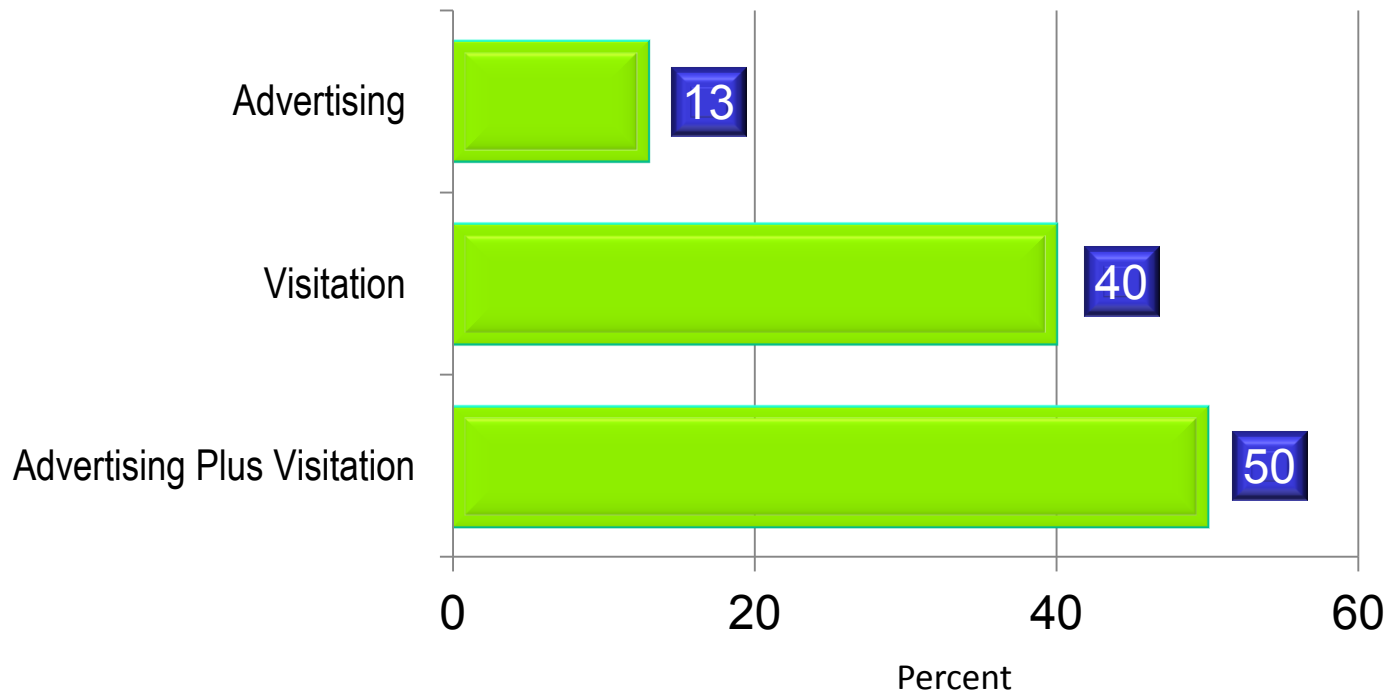
% Image Lift for South Dakota



A Good Place to Start a Business



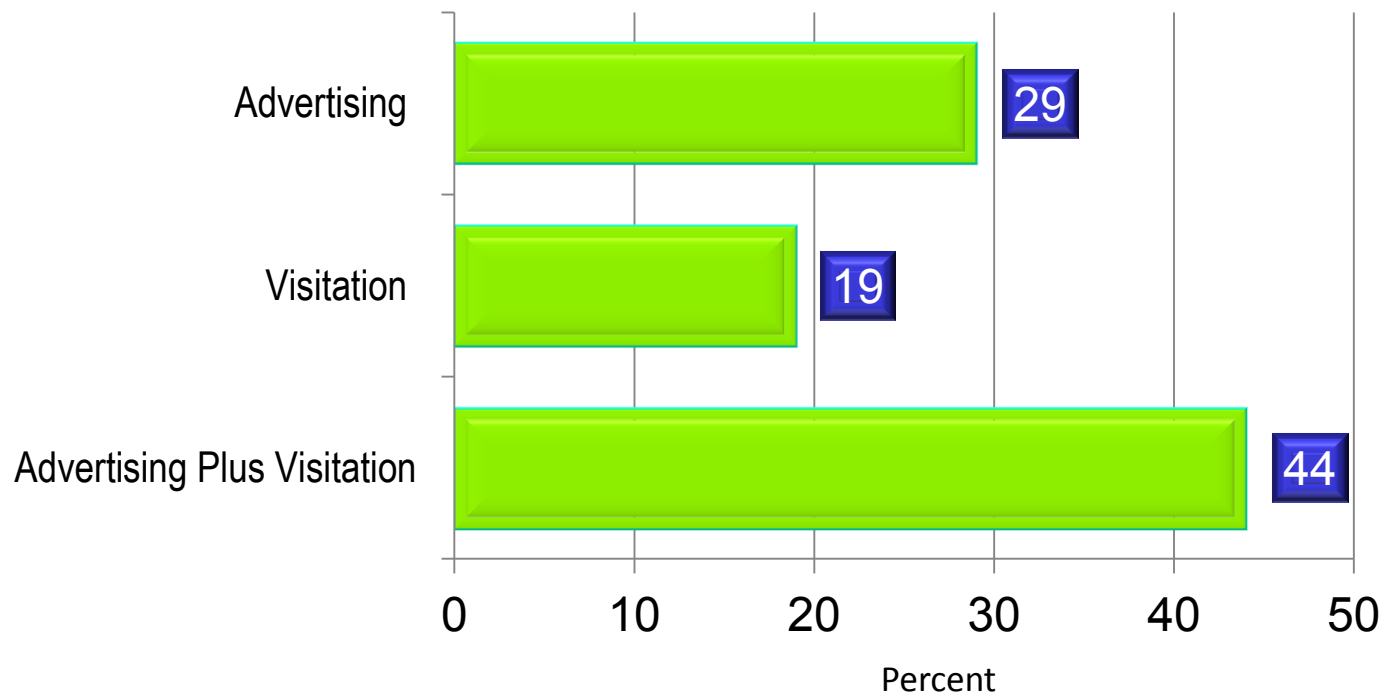
% Image Lift for South Dakota



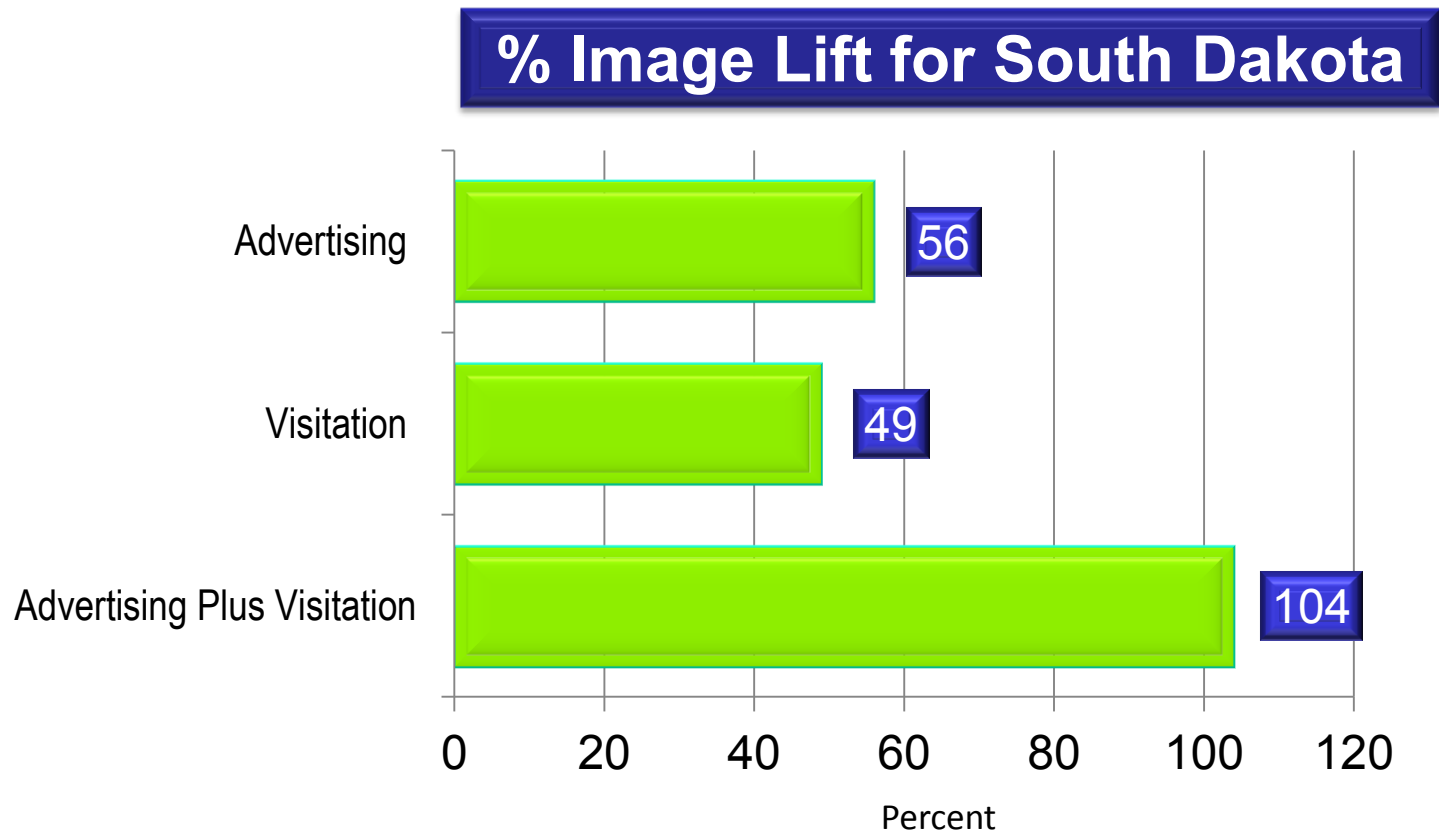
A Good Place to Attend College



% Image Lift for South Dakota



A Good Place to Purchase a Vacation Home



A Good Place to Retire



% Image Lift for South Dakota

