



Measuring the High Consideration Consumer

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VP for Marketing & Business Development

The background is a solid blue color. It features a network of white lines and dots of various sizes, creating a molecular or digital structure. On the left side, there is a large, stylized white circular shape with a smaller circle inside it, resembling a ring or a stylized 'O'. This shape is connected to several lines that radiate outwards. On the right side, there is another cluster of white dots and lines, forming a more complex network. The overall aesthetic is clean, modern, and tech-oriented.

DEFINING THE HIGH CONSIDERATION CONSUMER

What is a 'High Consideration Consumer'?

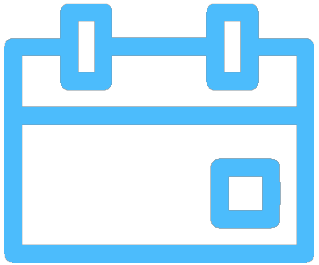
A consumer that is about to buy a **big ticket** item or a **complex product** that requires more research/time.

- HDTV
- Appliance
- Roofing
- Spa/Jacuzzi
- Car
- Jewelry
- Air Conditioner
- Furniture
- Flooring
- College
- Sports Equipment
- Computer
- Machinery
- Mattress
- TRAVEL



What Characterizes a 'High Consideration' Consumer in Tourism?

Longer Time
to Arrival



Greater propensity
to be influenced by
Media



Longer
distance to
Arrival



Longer Length
of Stay



Examples of High vs Low Consideration

TRAVEL

NON-TRAVEL

LOW



Atlantic City, NJ

2-3 days



HIGH



Grand Canyon, AZ

3-6 months



TIFFANY & Co.





MEASURING THE HIGH CONSIDERATION CONSUMER



**“Half the money I
spend on advertising
is wasted; the
trouble is I don’t
know which half.”**

John Wanamaker

Entrepreneur & Marketing Pioneer

(1838 – 1922)



Challenge: ROI Without Point of Sale

MARKETING METRICS THAT MATTER	
Marketers have access to more metrics than ever before. That's why it is so important for marketers to track the metrics that matter most.	
● = Vanity Metric ● = Better Metric	
EMAIL METRICS	VANITY
	Bounce Rate Sharing Stats Open Rate Deliverability Rate
	BETTER
	Leads Generated Click Through Rate Cost Per Lead Lead Quality
SOCIAL METRICS	VANITY
	Re-tweets/Shares Friends/Followers Number of Posts
	BETTER
	Number of Leads Closed Deals Purchasing Behavior Referrals
PAID SEARCH METRICS	VANITY
	Impressions Ad Position Click Through Rate Cost Per Click
	BETTER
	Number of Leads Cost Per Lead Cost Per Acquisition
DISPLAY METRICS	VANITY
	Impressions Click Through Rate Cost Per Impression
	BETTER
	Click To Lead Cost Per Lead Cost Per Acquisition



Measuring “High Consideration” Customers

Big Ticket



REQUIRES

**Complex
Products**

Longer Attribution Windows

More Impressions; More Media
(Owned, Paid, Earned)

Strong measures of incrementality

Holistic Return on Investment
Models

Robust Measurement Stack



In an Ideal World We'd Want to Measure:

- Which impressions influenced response (purchases or visits) the most?
- What was the optimal cadence of exposures (owned vs paid; click vs. impression)
- Repeat responses (both real world visits and online)
- Did the media drive incremental business?
- What was the true ROI of the program (in context)?
- What is the true marketing window for Customers in Market?




The problem is...measuring these things in tourism is *hard*--- and the stakes are high.





Misinformed local
stakeholder

We Don't Need to Fund
DMO's!!!
ARRRRGHHHHHHH!!!



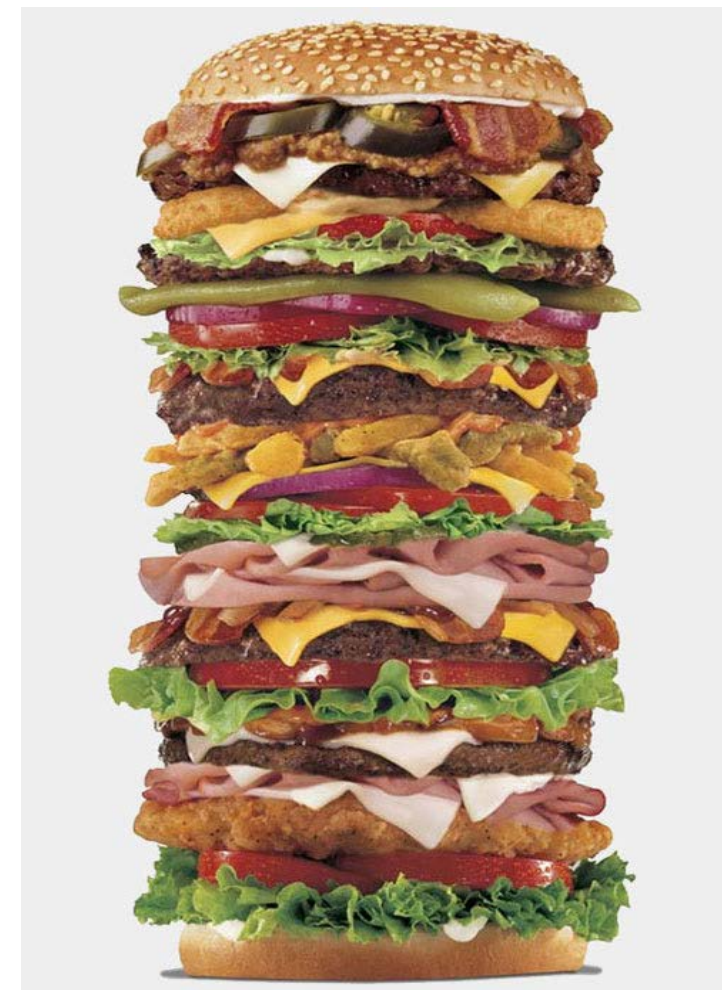
MEASURING THE HIGH CONSIDERATION CONSUMER, PART 2

FIRST...AN IMPORTANT CONSIDERATION



Truth in Advertising: There's No Single-Source Solution for Digital Media ROI

You need a Research & Analytics Stack



Considerations for building a measurement stack

1. Every research and analytics tool/resource has a blind spot.
2. Your stack should be comprised of complimentary data sources that form a complete picture.
3. Find data sources that correlate and align neatly.

Google Analytics	
Strengths	Weaknesses
Shows top content	No “final conversion”
Tracks inbound traffic accross publishers	Limited to digital activity

Arrivalist	
Strengths	Weaknesses
Shows final conversions	No spend data
More complete destination data	Limited tracking in certain publishers

VisaVue	
Strengths	Weaknesses
Spend data	Indiscriminate
Product Information	Heavy sampling

Primary Research	
Strengths	Weaknesses
Flexible structure	User reported
Psychographic & demographic	Heavy sampling



Chart Credit: Hoffman York Agency





The background is a solid blue color with a network of white lines and circles of various sizes, creating a digital or molecular aesthetic. The text is centered and reads:

WHY TRADITIONAL DIGITAL MEDIA METRICS FAIL TO MEASURE THIS CRITICAL CONSUMER SEGMENT



#1: CORRELATION

(OR A DEPRESSING LACK THEREOF)



Digital Metrics Correlation Study

Courtesy of:

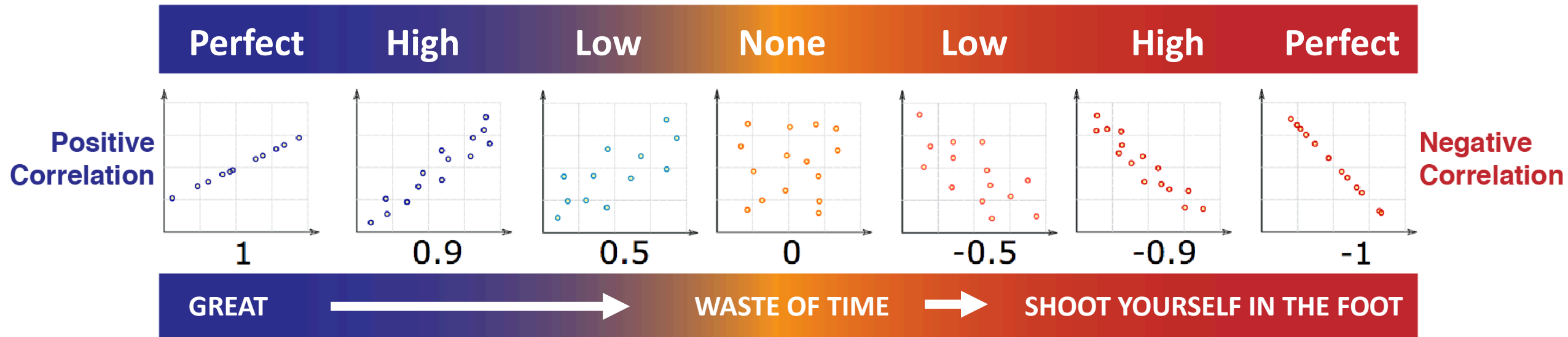
Jay Kinghorn, Associate Managing Director
Utah Tourism (USA)

Balakumar Raghuraman, Director of Accounts
Arrivalist

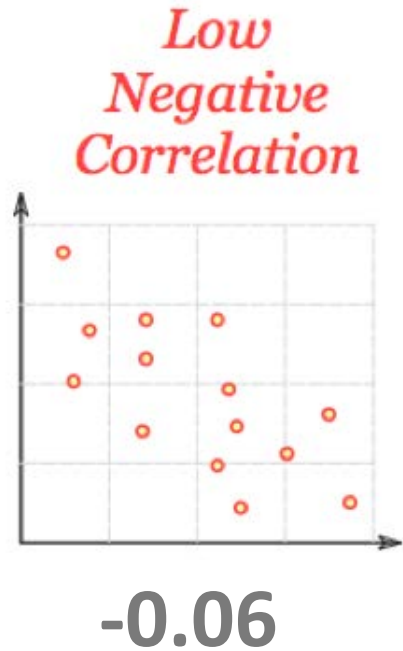
Correlation (A Refresher Course)

Correlation tells you if two data sets are strongly linked or not.

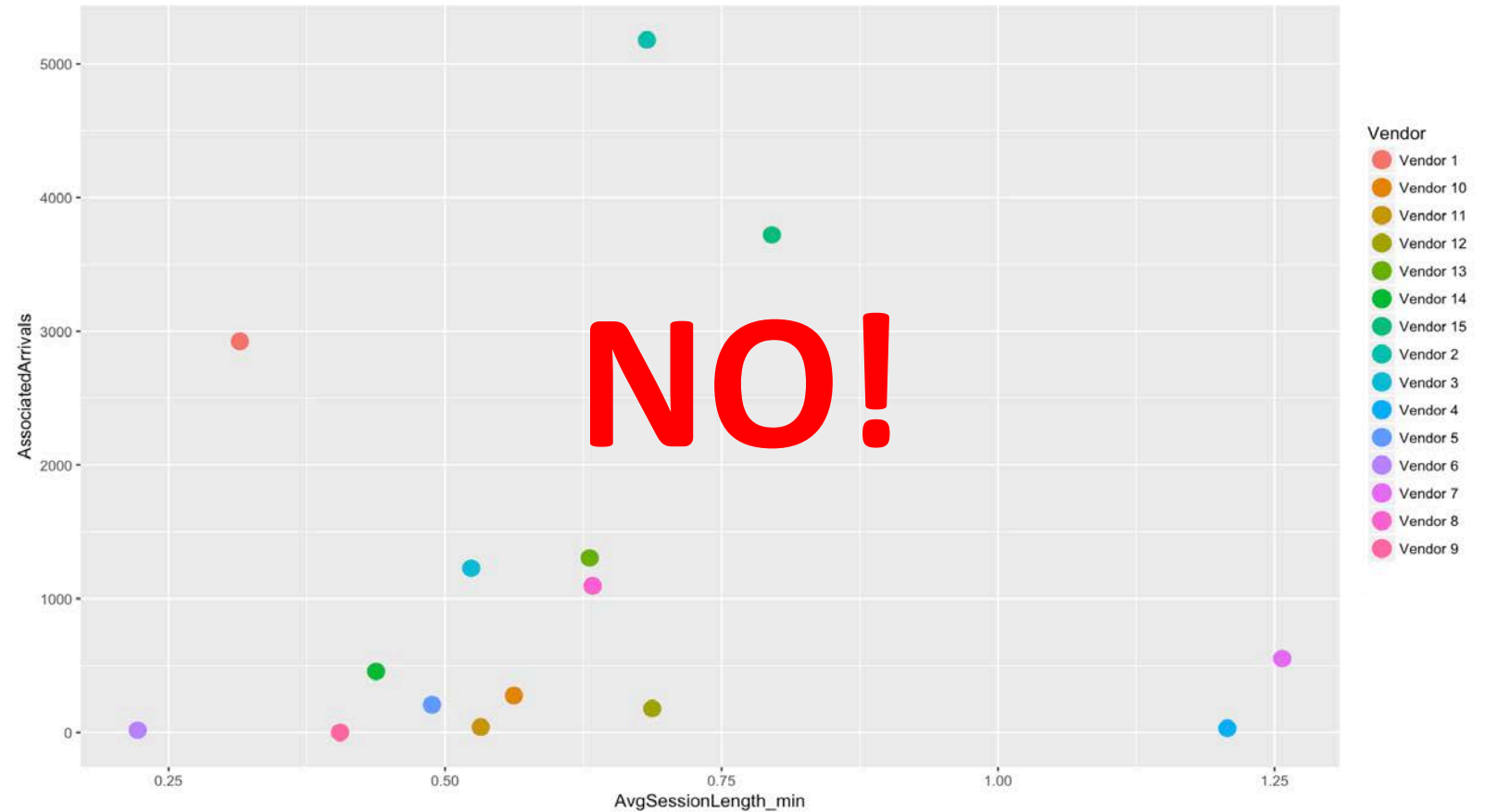
- Correlation is Positive when values increase together
- Correlation is Negative when one value decreases as the other increases



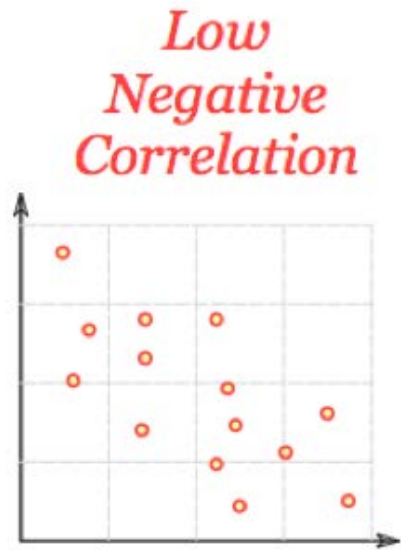
Did Average TIME ON SITE Yield More Arrivals?



adj. R-squared -0.06

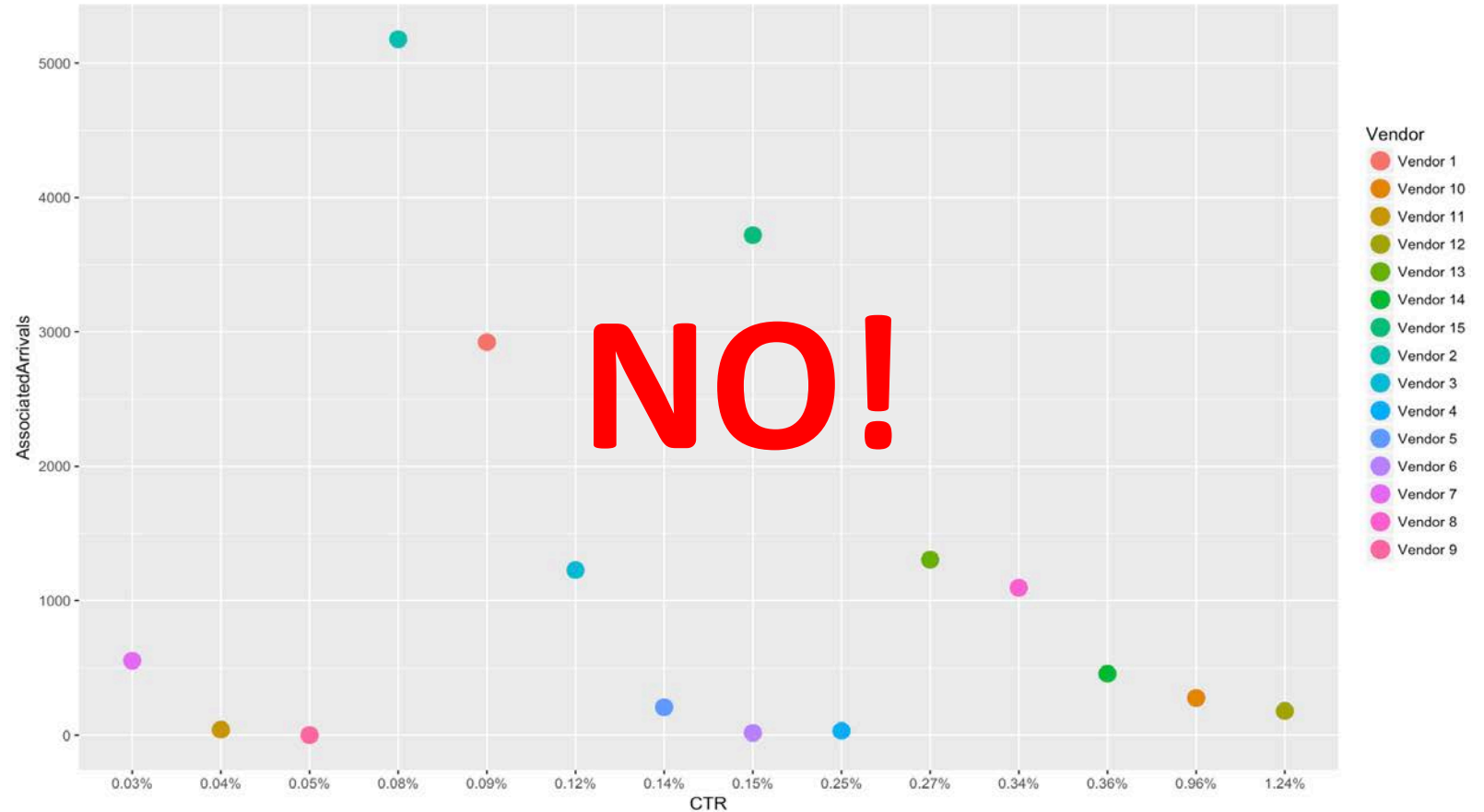


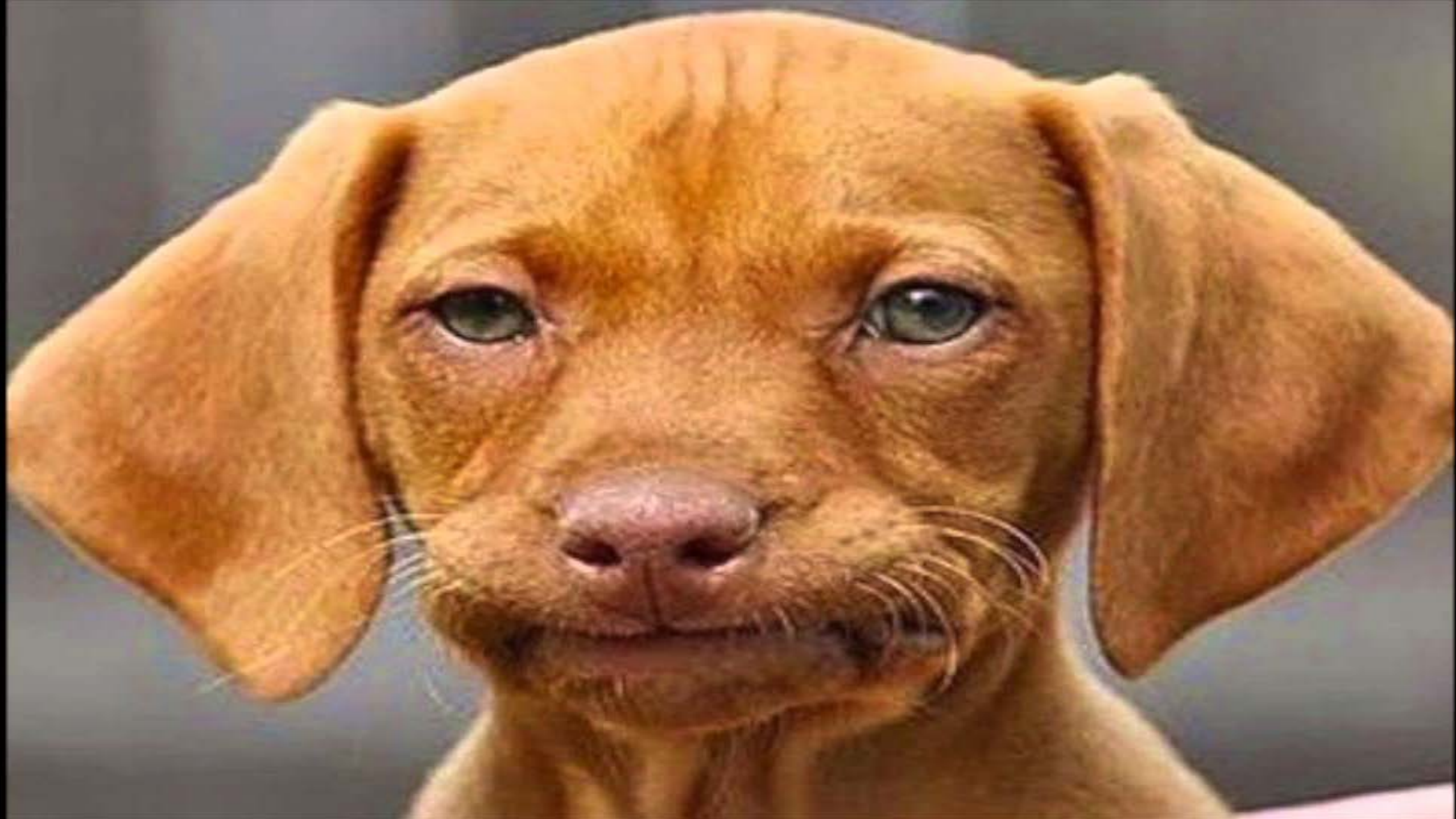
Did Click Thru Rate Correlate (And Deliver) A Higher Arrival Rate?



-0.077

adj. R-squared -0.77



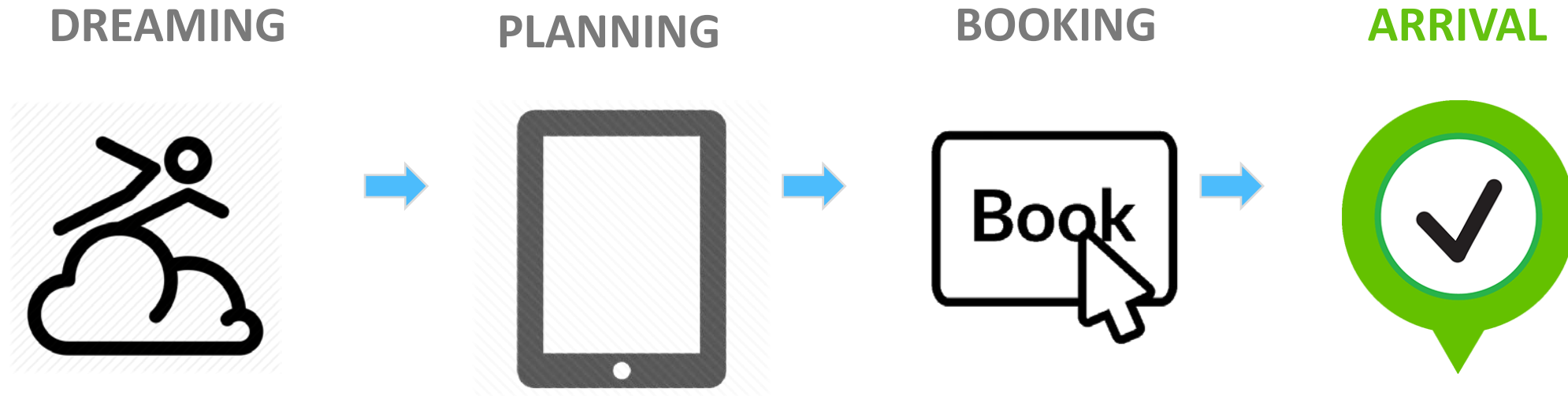




#2: THE TRAVEL PURCHASE CYCLE

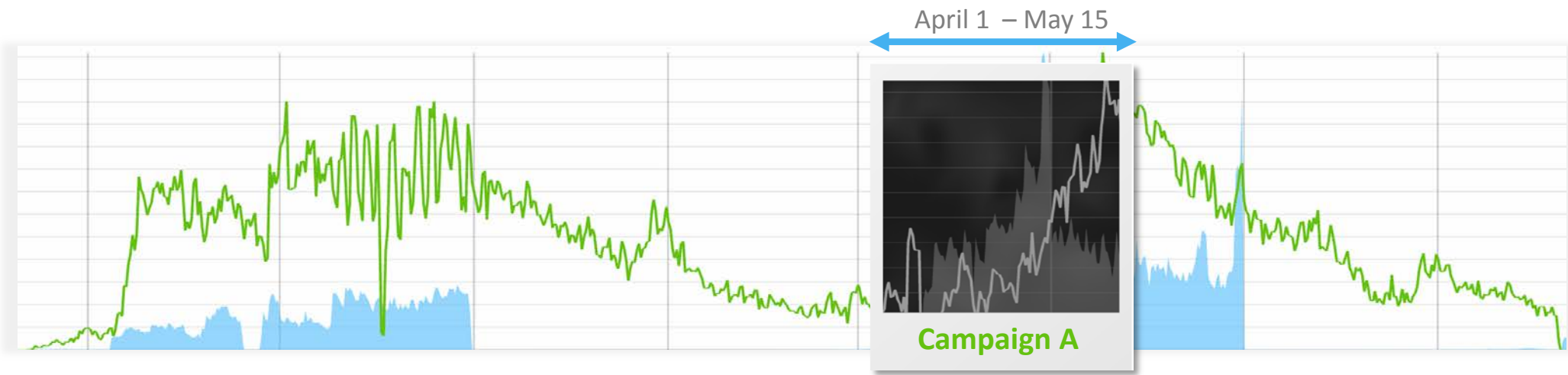
(IN SHORT, IT'S LOOOOOOOONG.)

The Travel Purchase Cycle can stretch over months, even years.

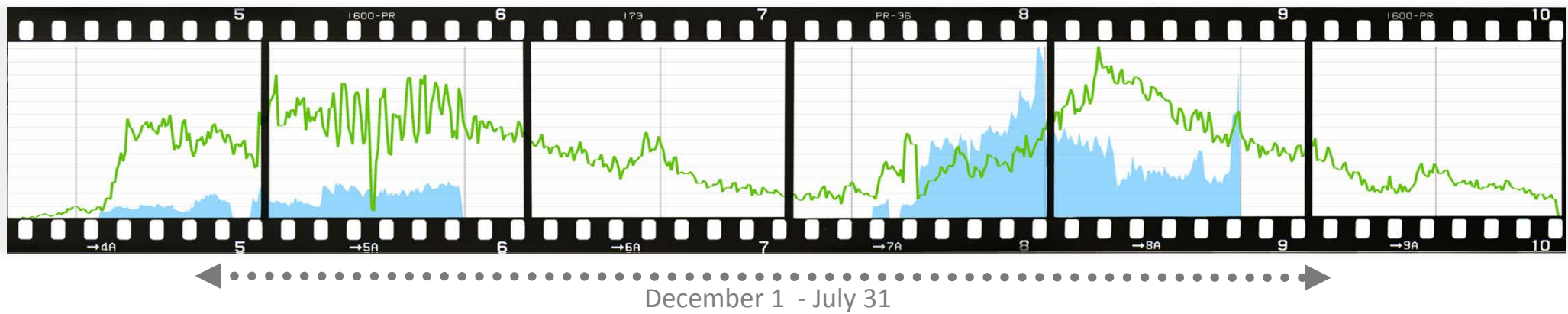


A Longer Path to Purchase Requires a Wider Window for Attribution

Traditional Metrics:
Provide a snapshot during an ad campaign



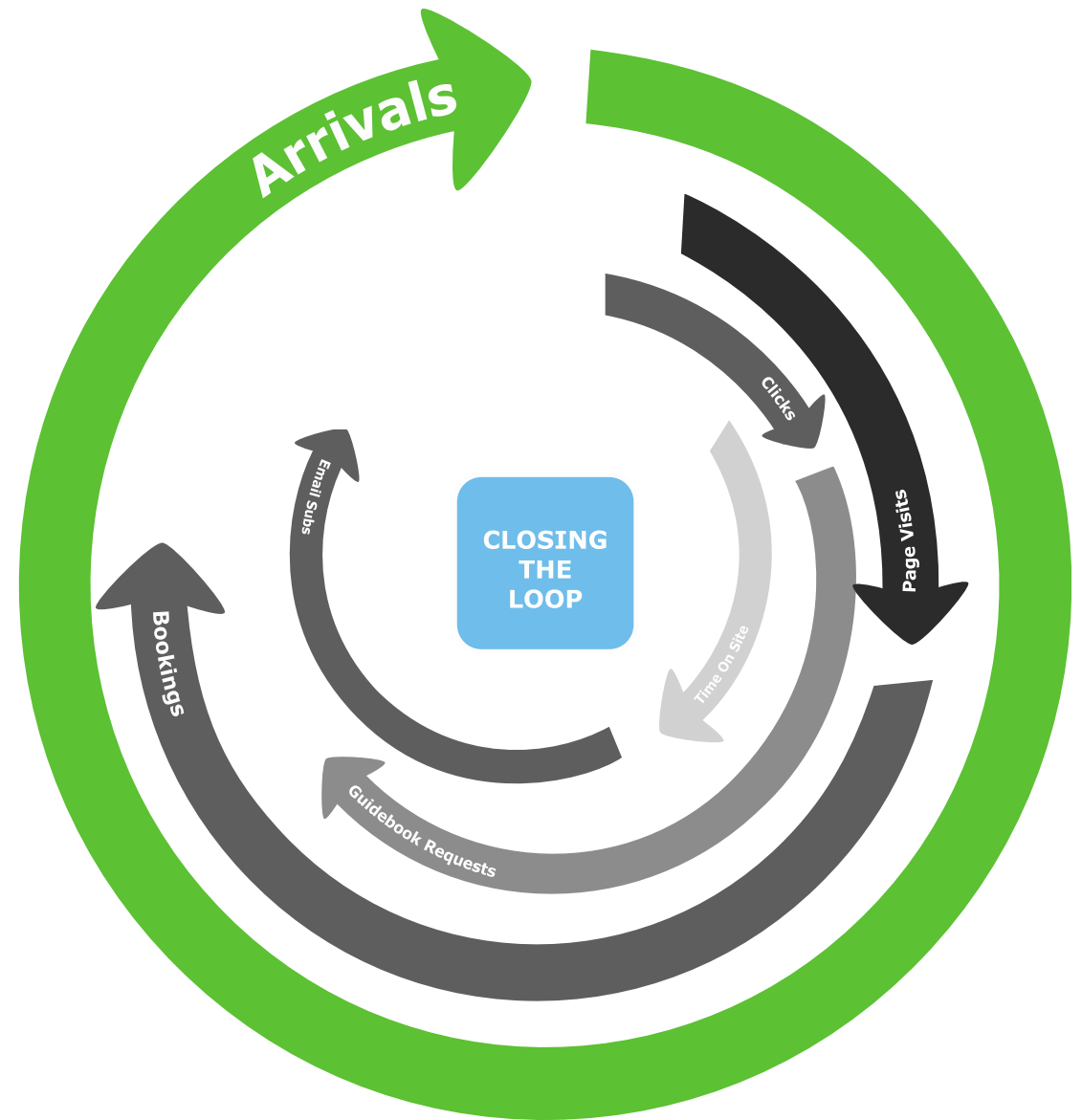
Arrivalist:
Provides a longer attribution window

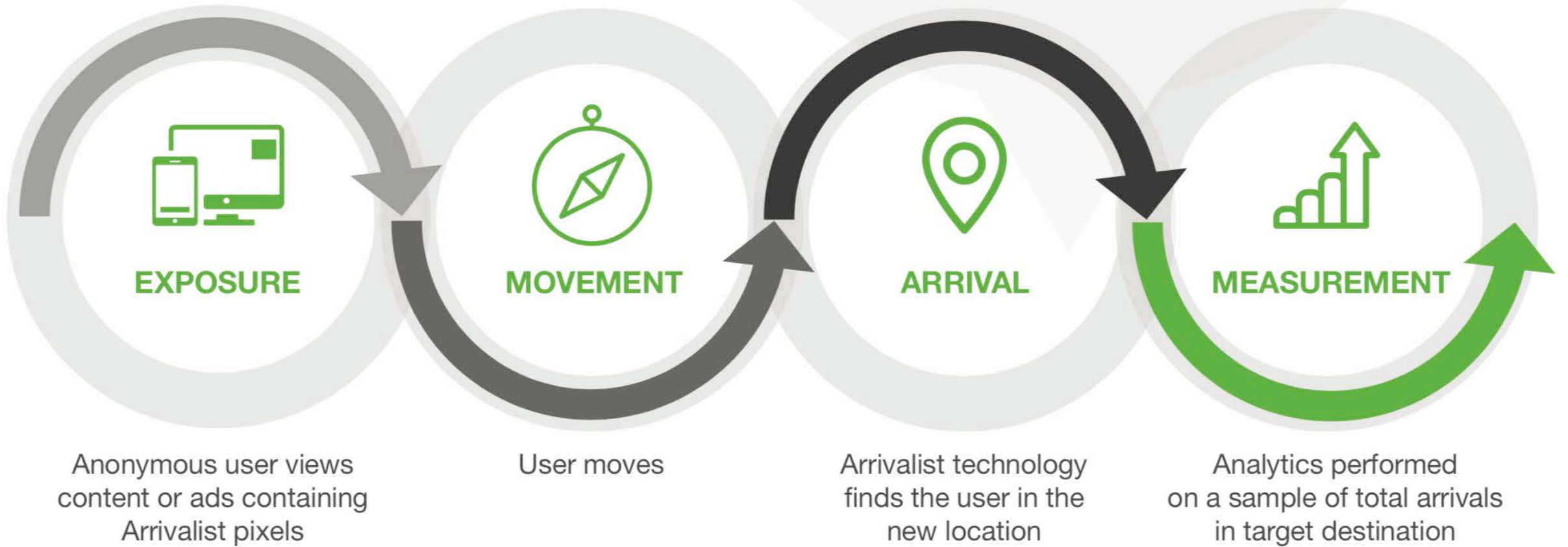




WHAT IS ARRIVALIST?

Arrivalist provides a unifying point of conversion based on privacy law compliant mobile location data. We call it the **ARRIVAL**.

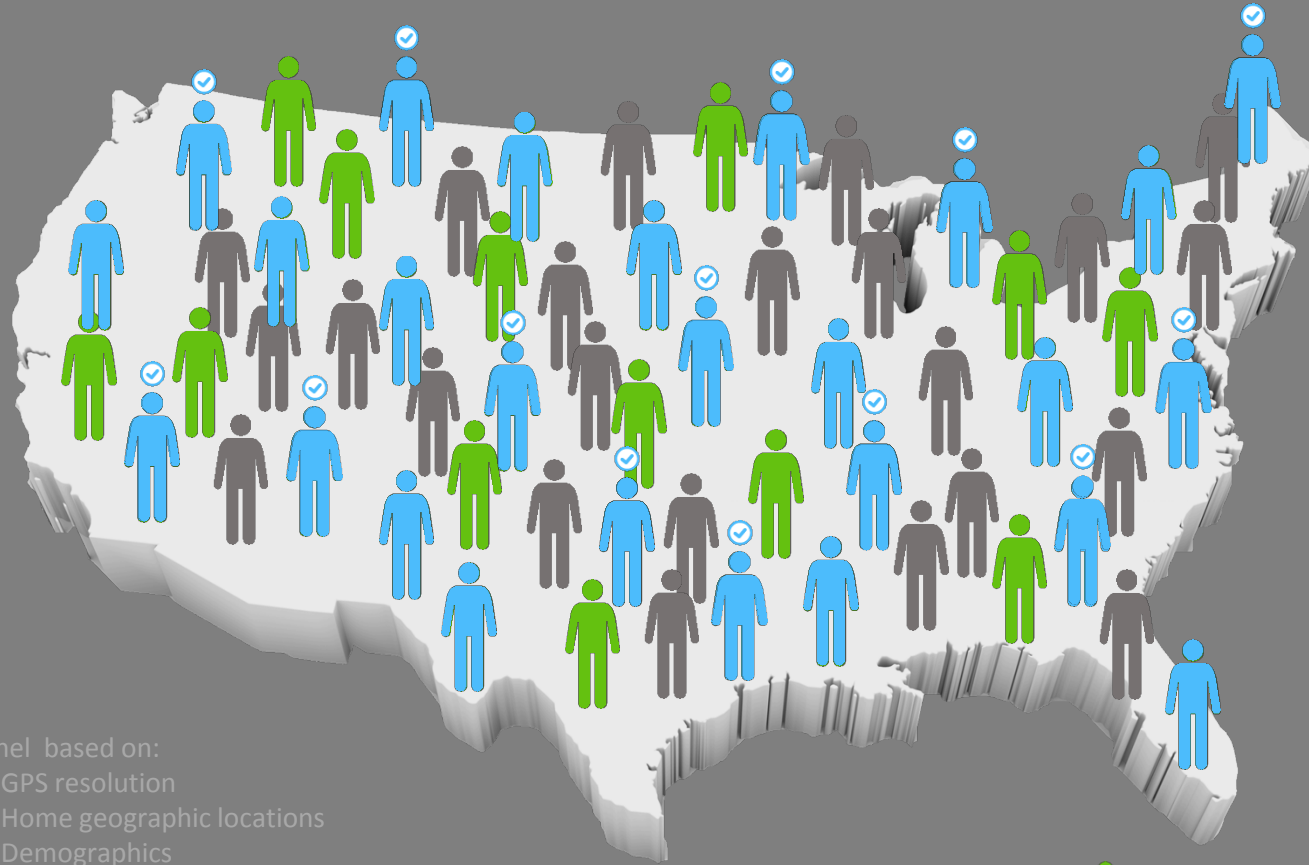




Arrivalist Methodology



Panel/GPS Methodology



Panel based on:

- GPS resolution
- Home geographic locations
- Demographics



Not Exposed to ads



Exposed to ads



Arrival Lift™



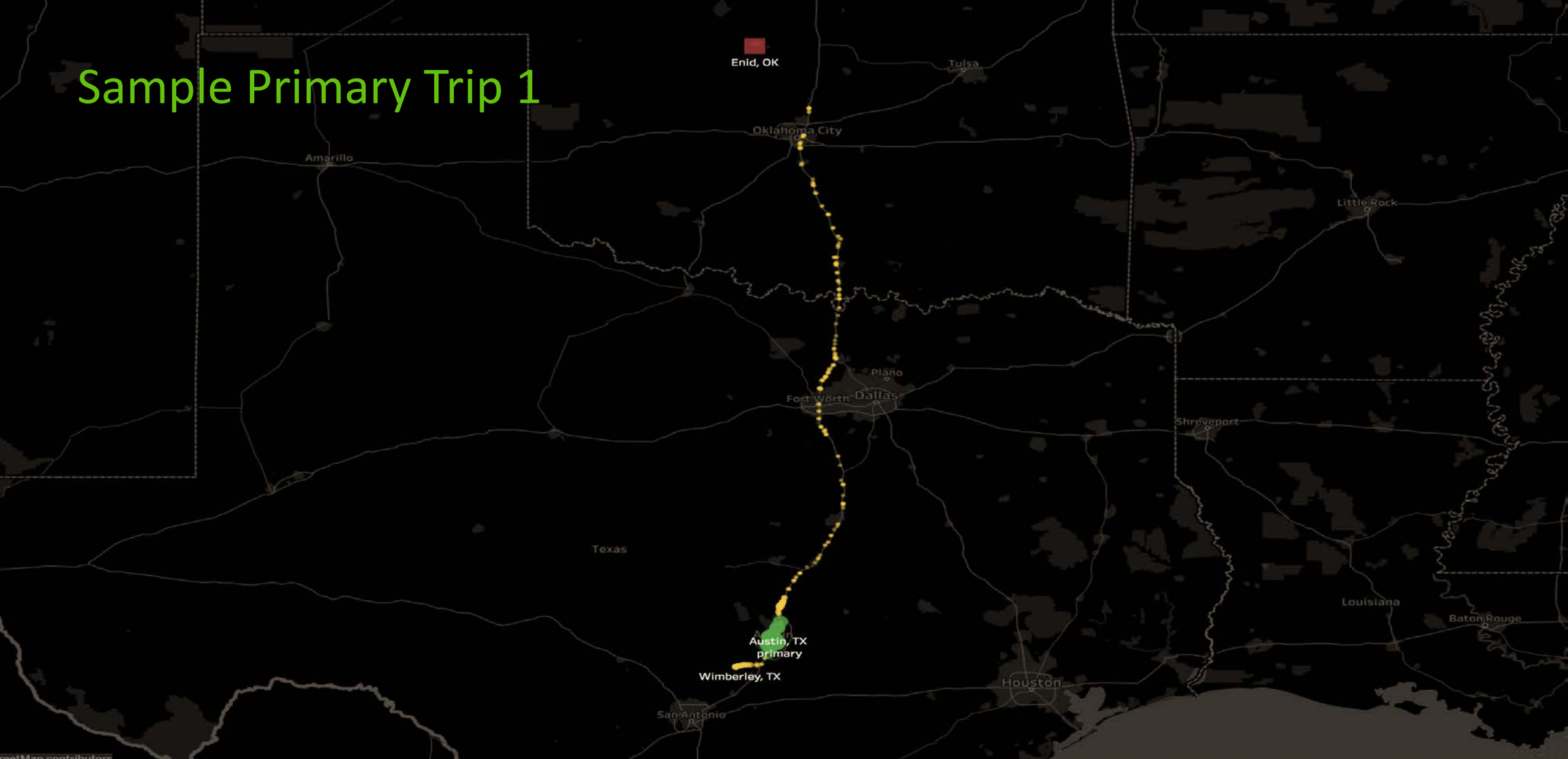
Stay Lift™

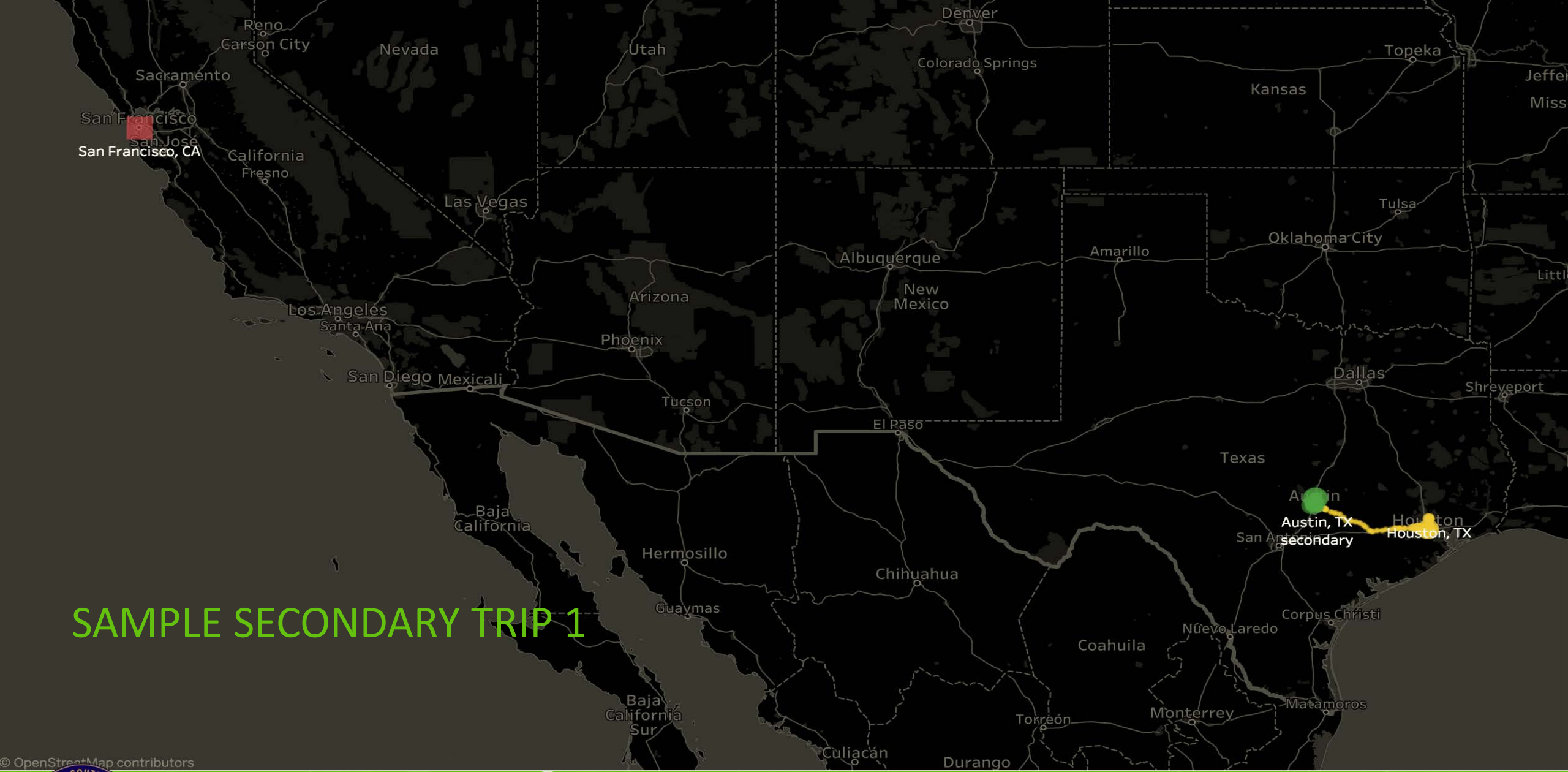
Arrivalist Panel Overview:

- Location data sourced from 2,000+ apps on iOS & Android mobile platforms
- Panel Size: 120M+ Monthly Active Users
- Location Accuracy: within 30 feet on average
- Panel is balanced using US Census-based population spread and demographic data
- Location measurement begins once the user leaves their home location, ending upon return home.



Sample Primary Trip 1



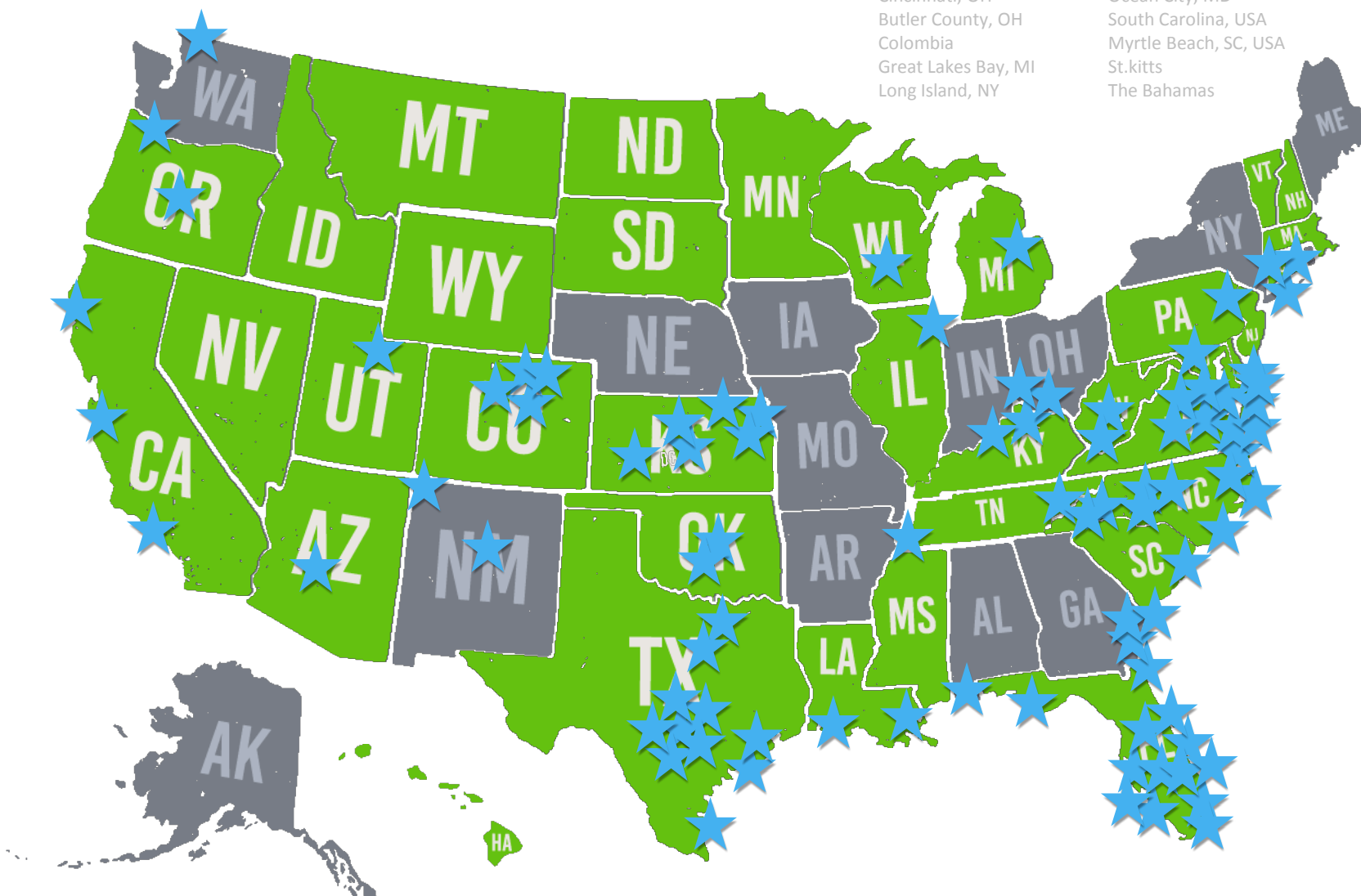


SAMPLE SECONDARY TRIP 1

© OpenStreetMap contributors



140+ Tourism Partners



Wisconsin, USA
Wisconsin Dells, WI, USA
Chicago, IL
Cincinnati, OH
Butler County, OH
Colombia
Great Lakes Bay, MI
Long Island, NY

Massachusetts
Mohegan Sun, Uncasville, CT, USA
Ocean City, MD
South Carolina, USA
Myrtle Beach, SC, USA
St. Kitts
The Bahamas

Bermuda
BrandUSA
Canada
Chile
Hiroshima
Albuquerque, NM, USA
California, USA
Los Angeles, CA
Sonoma County, CA
Florida, USA
Charlotte County, FL
Kissimmee, FL, USA
Daytona Beach, FL, USA (Volusia)
Amelia Island, FL
Fort Lauderdale, FL, USA
Orlando, FL, USA
Orlando, FL, USA
Space Florida, FL, USA (Brevard County)
San Antonio, TX, USA
Pensacola, FL, USA
Palm Beaches, FL
New Smyrna Beach, FL
Delaware, USA
Colorado, USA
Denver, CO, USA
Estes Park, CO, USA (Co-Op)
Boulder, CO
Breckenridge, CO, USA
Texas, USA
Fort Worth, TX, USA
Galveston, TX, USA
San Marcos, TX, USA
Cedar Park, TX
Dallas, TX

Fredericksburg, TX
South Padre Island, TX, USA
New Braunfels, TX, USA
San Antonio, TX, USA
Houston, TX, USA
Austin, TX, USA
Golden Isles, GA
Gulf Shores, AL, USA
Howard County, MD, USA
Idaho, USA
Kansas, USA
Kansas City, KS, USA (Co-op)
Hutchinson, KS, USA (Co-op)
Lawrence, KS (Co-op)
Salina, KS, USA (Co-op)
Dodge City, KS (Co-op)
Topeka, KS, USA- now comp
Kentucky, USA
Lexington, KY, USA
Louisville, KY
Louisiana, USA
Lake Charles, LA
New Orleans, LA, USA
Memphis, TN, USA
Sevierville, TN, USA
Minnesota, USA
Montana, USA
Nevada, USA
Fort Collins, CO, USA
Butte, MT, USA
Randolph County, NC, USA (Co-Op)
Franklin, NC, USA (Co-op)
Wilmington, NC, USA

Asheville, NC, USA
Currituck, NC, USA
Cabarrus County, NC, USA (Co-Op)
Elizabeth City, NC
North Dakota, USA
Oklahoma, USA
Oklahoma City, OK, USA
Chickasaw Nation, OK, USA
Oregon, USA
Portland, OR, USA
Central Oregon, OR, USA
Ottawa, ON, CAN
Pennsylvania
Poconos, PA, USA
Phoenix, AZ
Virginia, USA
Richmond, VA, USA (Co-Op)
Williamsburg, VA (Co-Op)
Norfolk, VA, USA (Co-Op)
Fairfax County, VA (Co-Op)
Alexandria (Co-Op)
Savannah, GA, USA
Tybee Island, GA, USA
SLO CAL
South Dakota, USA
Utah
Park City, UT, USA
Bellingham/Whatcom County, WA

95+ CITIES
39 STATES
3 COUNTRIES



A landscape photograph of a South Dakota butte, likely Badlands National Park. The butte has a sharp, jagged peak and is composed of layered rock formations. The foreground is a grassy field with dry, yellowish-brown grass. The sky is a deep blue with scattered white clouds. The text "SOUTH DAKOTA" is in a smaller, white, sans-serif font, and "Visitation Data Analysis" is in a larger, bold, white, sans-serif font. Both are centered over the butte.

SOUTH DAKOTA Visitation Data Analysis

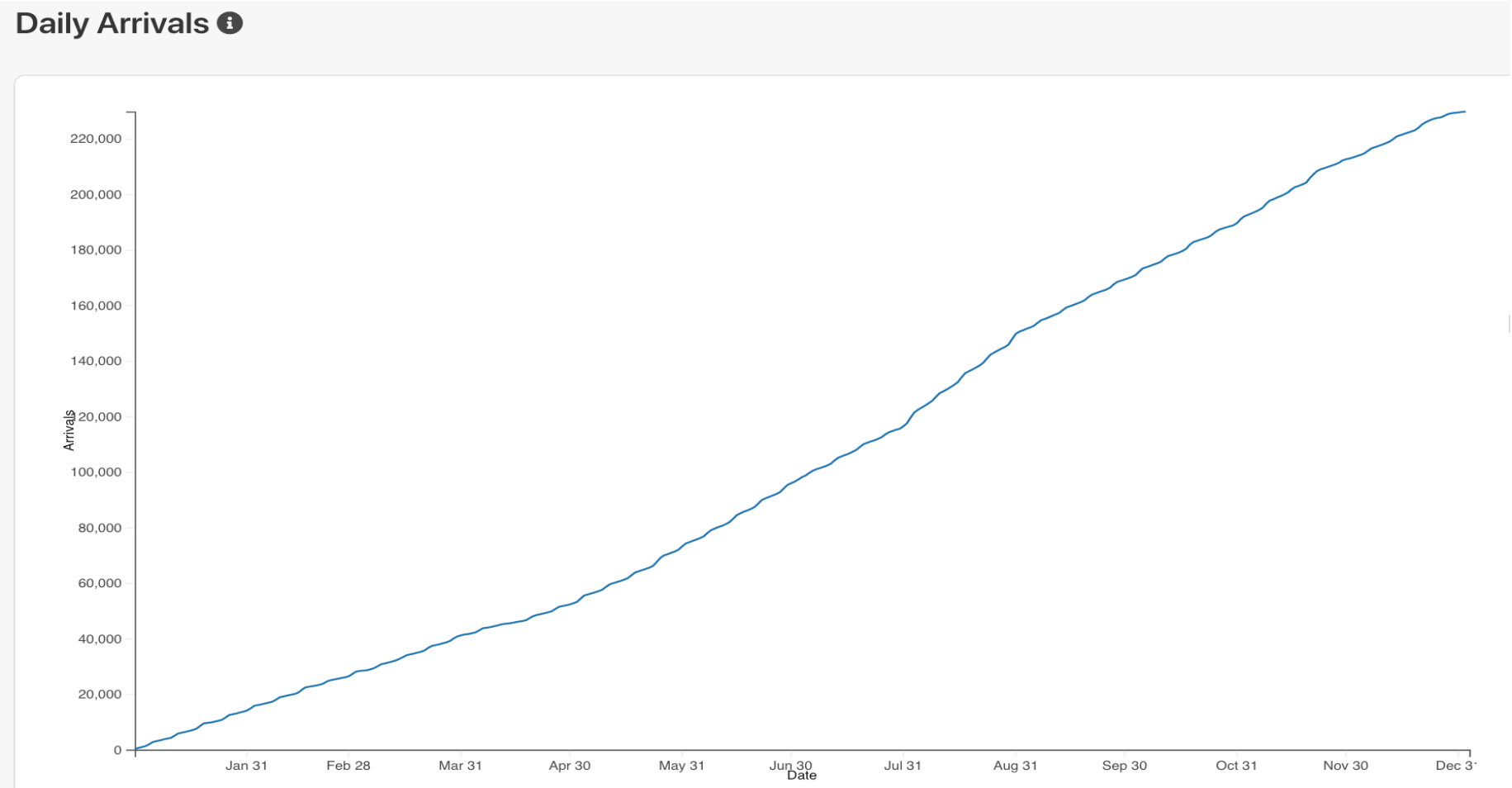
South Dakota Visitation: Arrival Sample Size

Cumulative Arrivals Chart

Jan – Dec 2018

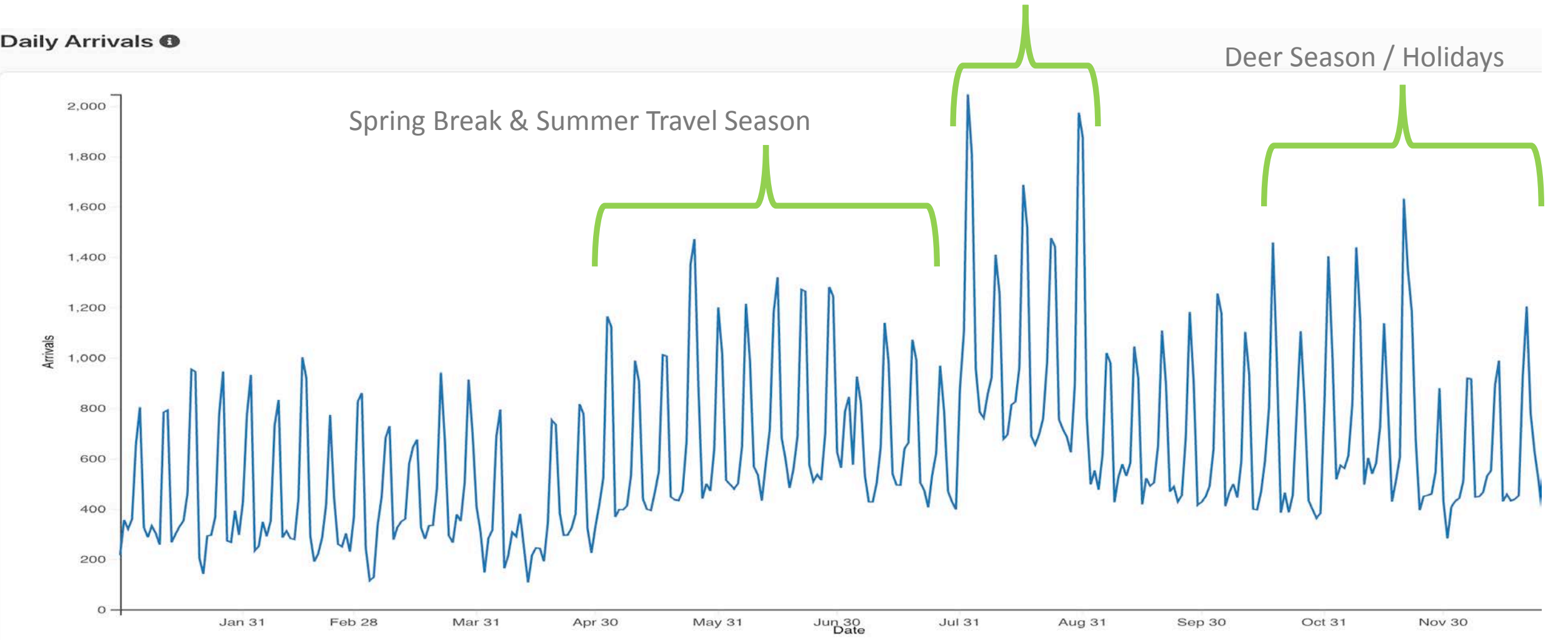
Total Sample Size:
229,650 Arrivals

Total Overnight Sample:
142,529 Overnight Arrivals



South Dakota Visitation Trends: 2018

Daily Arrivals ⓘ

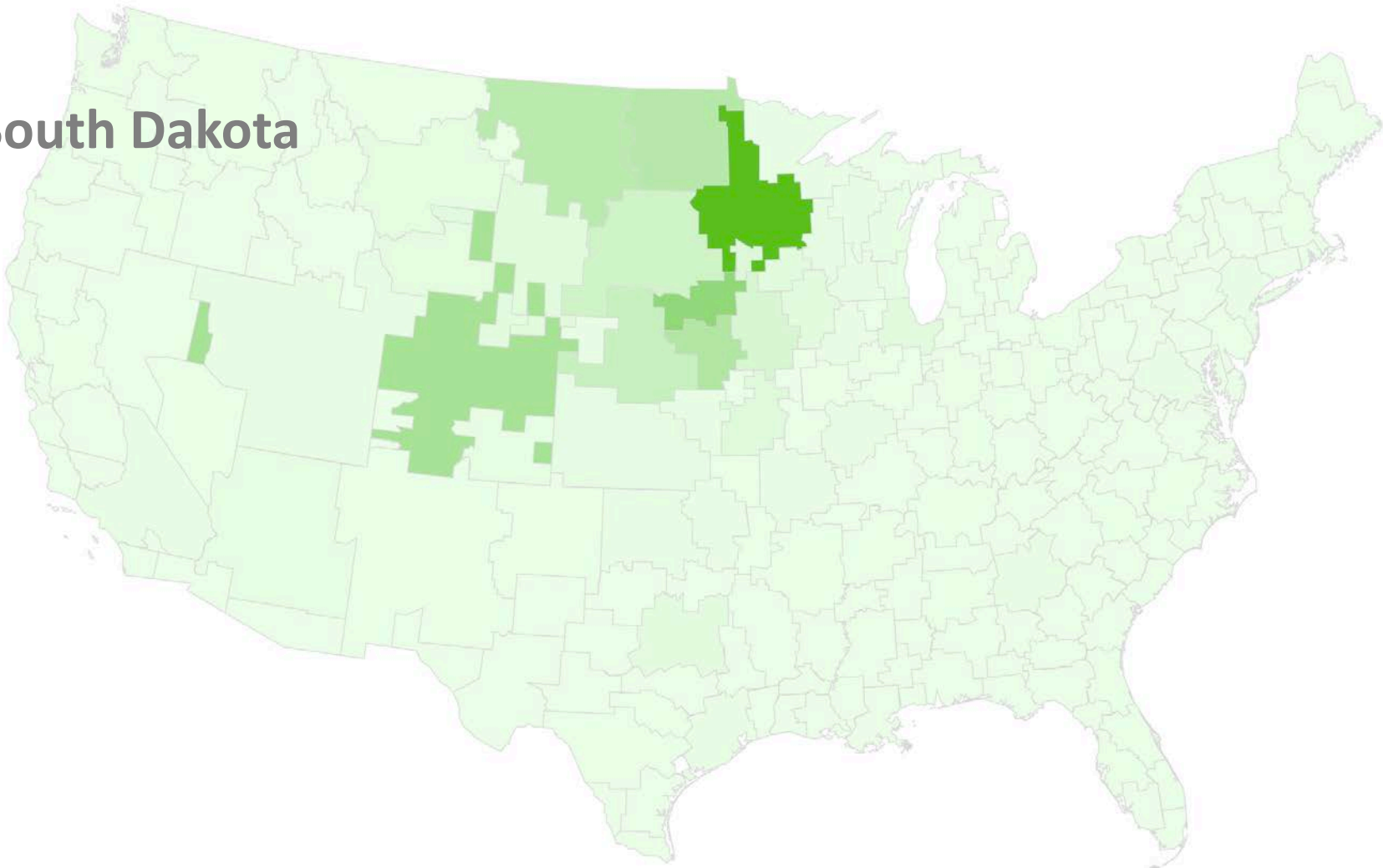


Out of State Visitor Analysis: Top Origin Markets

44%

of all out of state arrivals
spend at least 2 nights in South Dakota

UNEXPOSED VISITORS	55,004
DMA REGIONS	% ARRIVALS
Minneapolis/Saint Paul	18.7%
Denver	7.7%
Omaha	7.0%
Minot/Bismarck/Dickinson	6.9%
Fargo/Valley City	5.9%
Sioux City	5.5%
Lincoln/Hastings/Kearney	5.0%
Des Moines/Ames	2.8%
Kansas City	2.2%
Chicago	1.6%

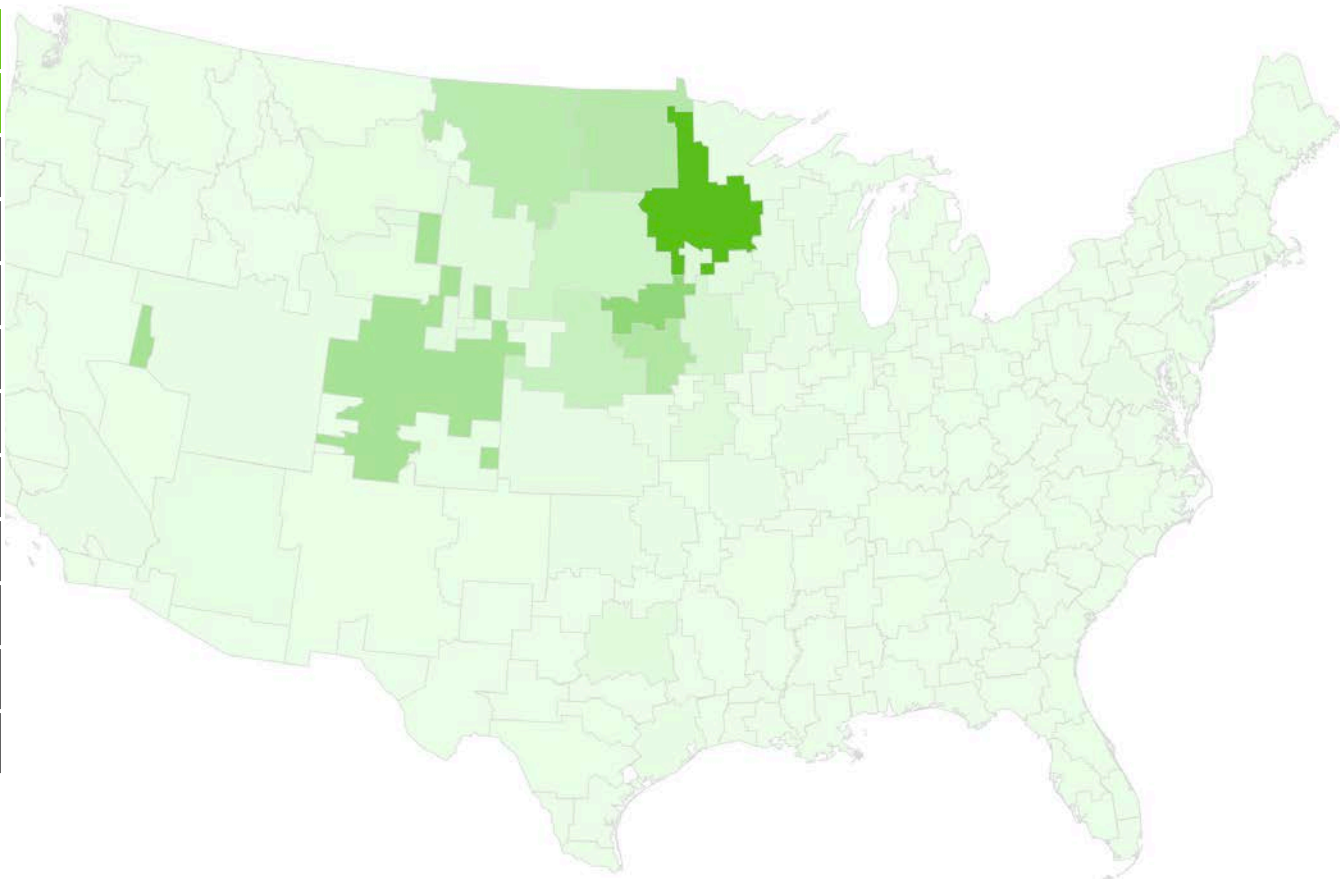


Out of State Visitor Analysis: Average Length of Stay

2 Days, 22 Hours

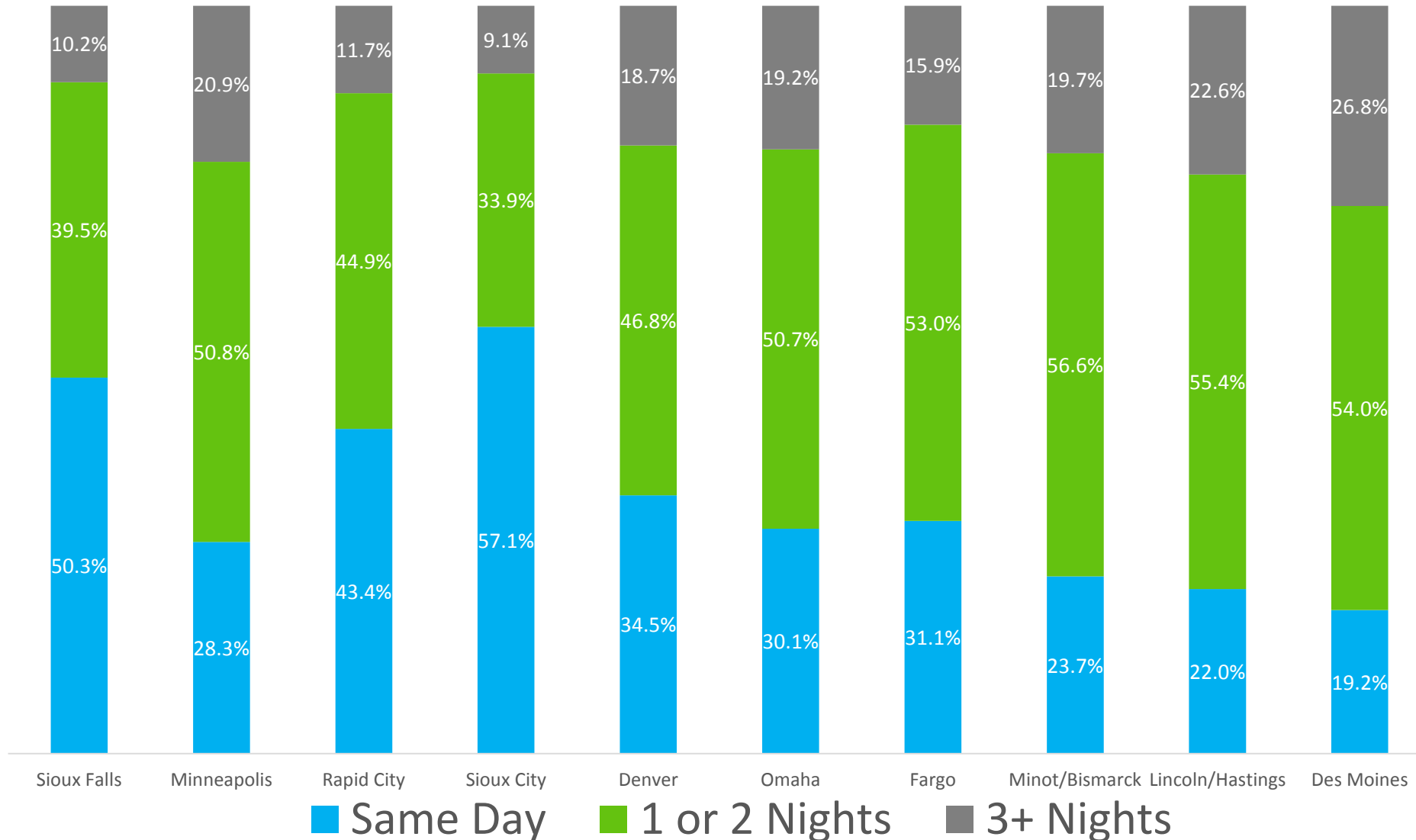
Avg Time Spent by Out of State Visitors in South Dakota

UNEXPOSED VISITORS	125,031	
DMA REGIONS	% ARRIVALS	AVG. TIME SPENT
Minneapolis/Saint Paul	19.8%	3 Days, 1 Hour
Sioux City	12.2%	1 Day, 23 Hours
Denver	9.1%	2 Days, 11 Hours
Omaha	7.7%	2 Days, 15 Hours
Fargo/Valley City	7.0%	2 Days, 10 Hours
Minot/Bismarck/Dickinson	6.5%	2 Days, 9 Hours
Lincoln/Hastings/Kearney	4.6%	2 Days, 13 Hours
Sioux Falls/Mitchell	3.6%	1 Day, 19 Hours
Des Moines/Ames	2.5%	3 Days, 2 Hours
Mankato	1.7%	2 Days, 19 Hours



TOP OUT OF STATE, DOMESTIC ORIGIN MARKETS TO SOUTH DAKOTA: DAYTRIPS, 1 OR 2 NIGHTS, 3+ NIGHTS

% Day-Trips, Short Stays & Longer Stays by Top Markets



Key Highlights

- 44.1% of visitors are overnight stays
- 71.7% of Minneapolis visitors stay 1 night or more
- Of major origin markets, Sioux City and Sioux Falls see more than 50% day trips

IntraState Visitor Analysis: South Dakota Residents



37.2%

Of Arrivals Originate From Within SD

- Overall, SD residents have an average length of stay of **1 day, 18 hours**
- Sioux Falls residents have an average length of stay of **1 day, 18 hours**
- Rapid City DMA residents have an average length of stay of **1 day, 23 hours**

Residents of South Dakota must travel at least 75 miles from home before being counted as an Arrival.

Point of Interest Focus: Custer State Park

Custer State Park



6,592

Attributed Trips

10 Hours

Avg. POI Duration

3 Days, 19 Hours

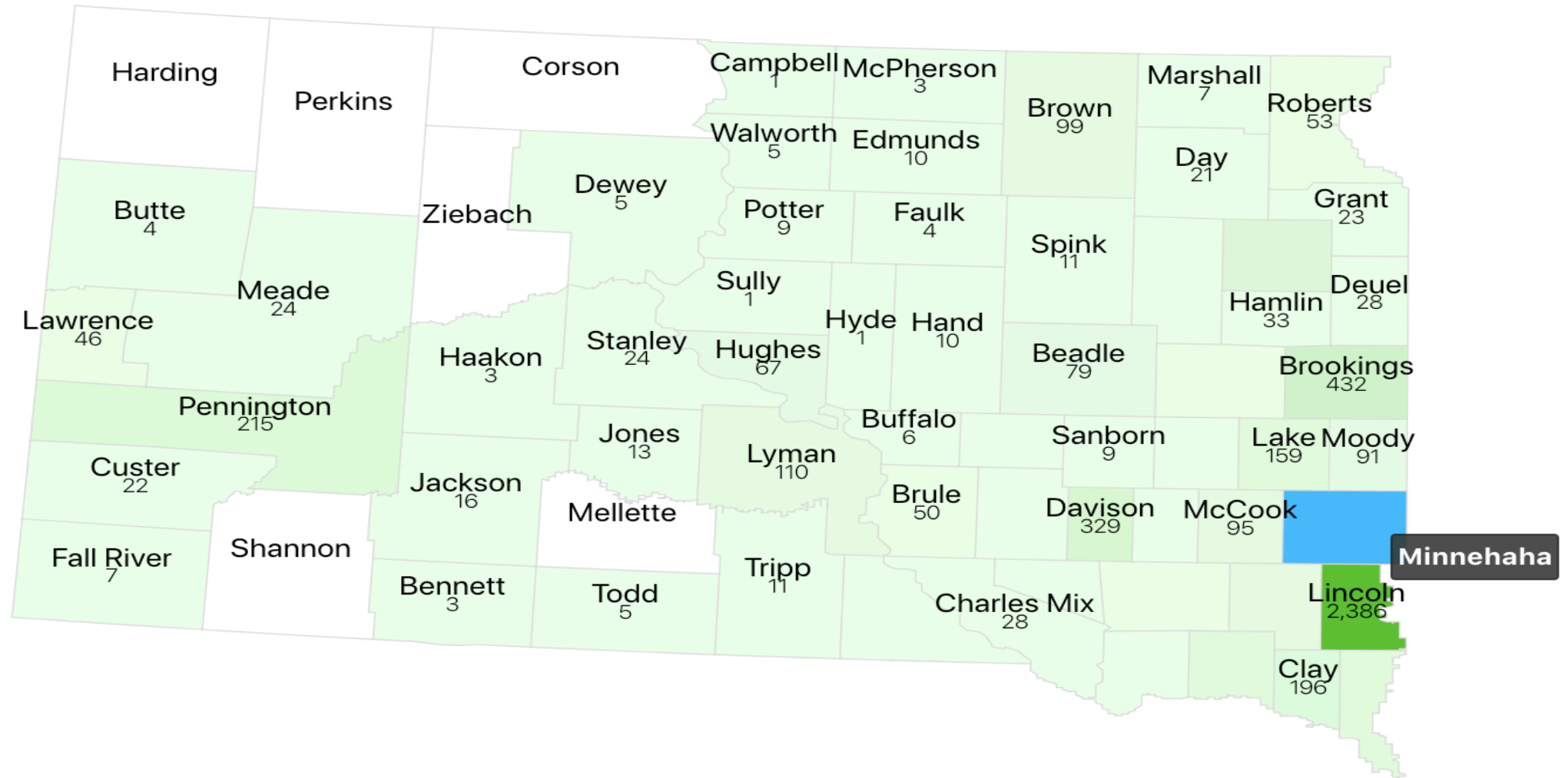
Avg. Time in State

9% who visited the park

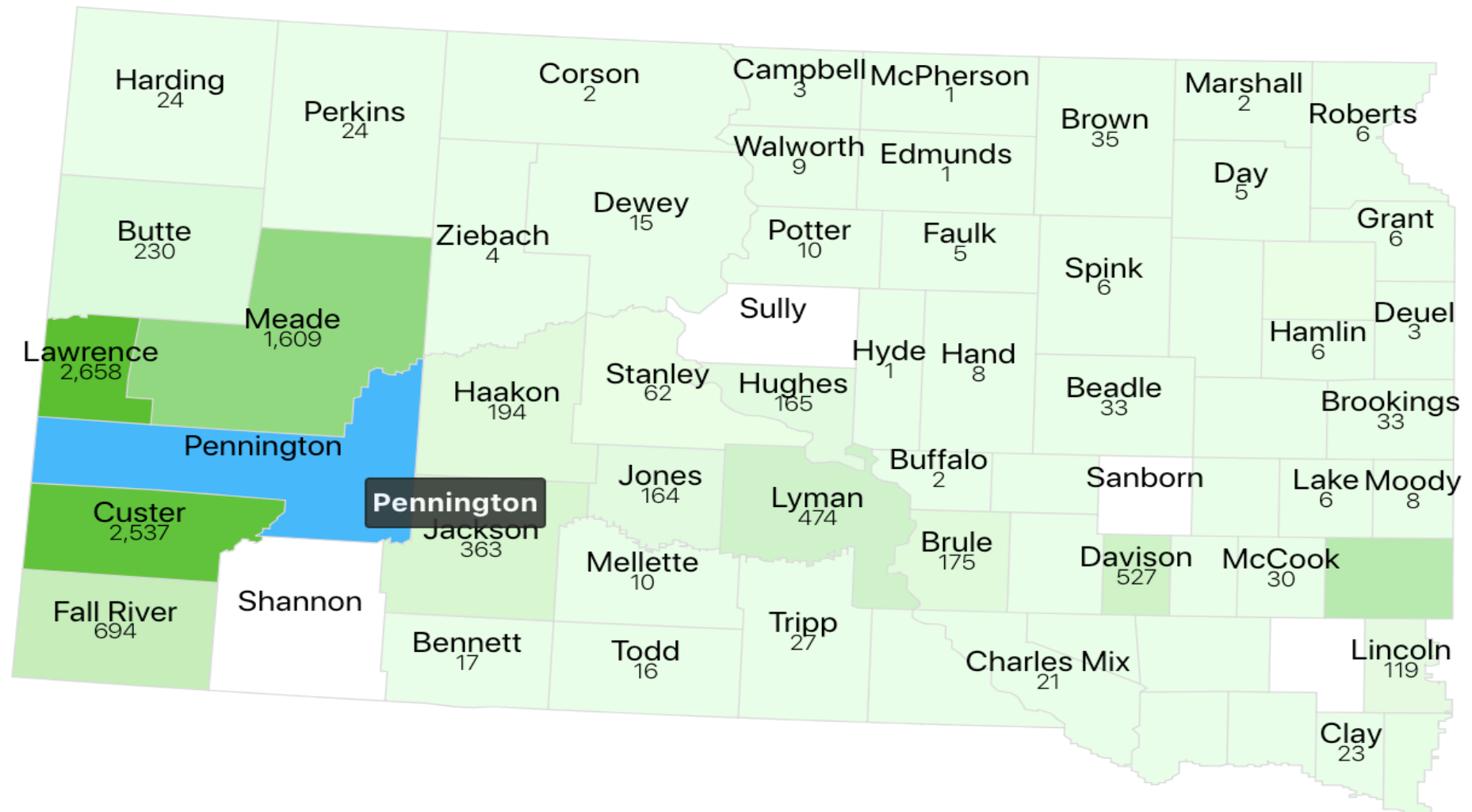
Came via the Rapid City or Sioux Falls Airport



Cross Visitation from Gateway Counties: Minnehaha



Cross Visitation from Gateway Counties: Pennington





South Dakota Tourism: State Marketing Program Review

Measuring Incremental Visitation and Time in Market

Arrival Lift™

Incremental Visitation Rate from Exposed

User Profiles:

- By Media Source
- By Origin Market
- By Media Type
- By Campaign/ Creative

Stay Lift™

Incremental increase in Duration of Stay from

Exposed User Profiles:

- By Media Source
- By Origin Market
- By Media Type
- By Campaign/ Creative



Illustrate the Value of Your Marketing Dollars – Stay Lift

Arrivalist Control Group



198,128



Avg. Length
of Stay

1 Day,
4 Hours

Arrivalist Exposed Group



198,128



Avg. Length
of Stay

1 Day,
7 Hours

+3 Hours Longer
in South Dakota

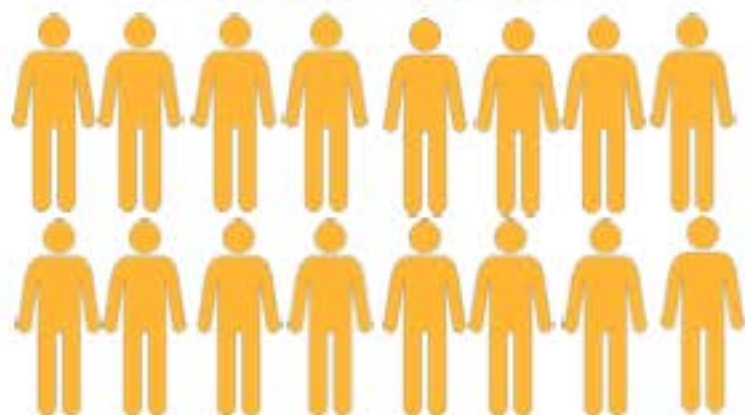


StayLift



Illustrate the Value of Your Marketing Dollars – Arrival Lift

Arrivalist
Control Group



**15.6 visitors /
1,000 panelists**

Arrivalist
Target Group



**20.5 visitors /
1,000 panelists**

1.3X



31.2%



ArrivalLift



Looking at Marketing ROI for Key Origin Markets

ARRIVALS PER 1,000 EXPOSURES

HOLISTIC ARRIVAL VOLUME

TIME IN MARKET

Minneapolis

8.7%

Panelist Arrivals

1 Day, 16 Hrs.

Avg. Time in Market

0.79

APM

Denver

3.4%

Panelist Arrivals

1 Day, 17 Hrs.

Avg. Time in Market

0.78

APM

Sioux Falls

53.6%

Panelist Arrivals

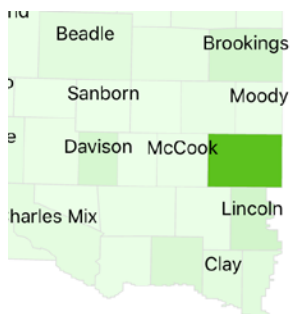
1 Day, 2 Hrs.

Avg Time in Market

6.0

APM

Gateway Counties Focus



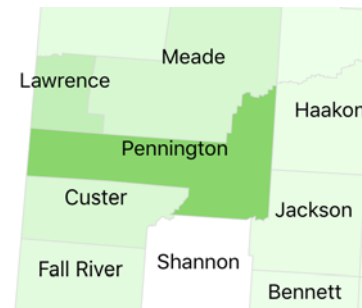
Minnehaha

21.7% of Visitors to South Dakota make this their primary destination

If Minnehaha is your primary destination, you spend **1 Day, 5 Hours** on average in South Dakota

Visitors are:

33.5% from South Dakota
66.5% from outside of the state



Pennington

14.8% of Visitors to South Dakota make this their primary destination

If Pennington is your primary destination, you spend **2 Days, 3 Hours** on average in South Dakota

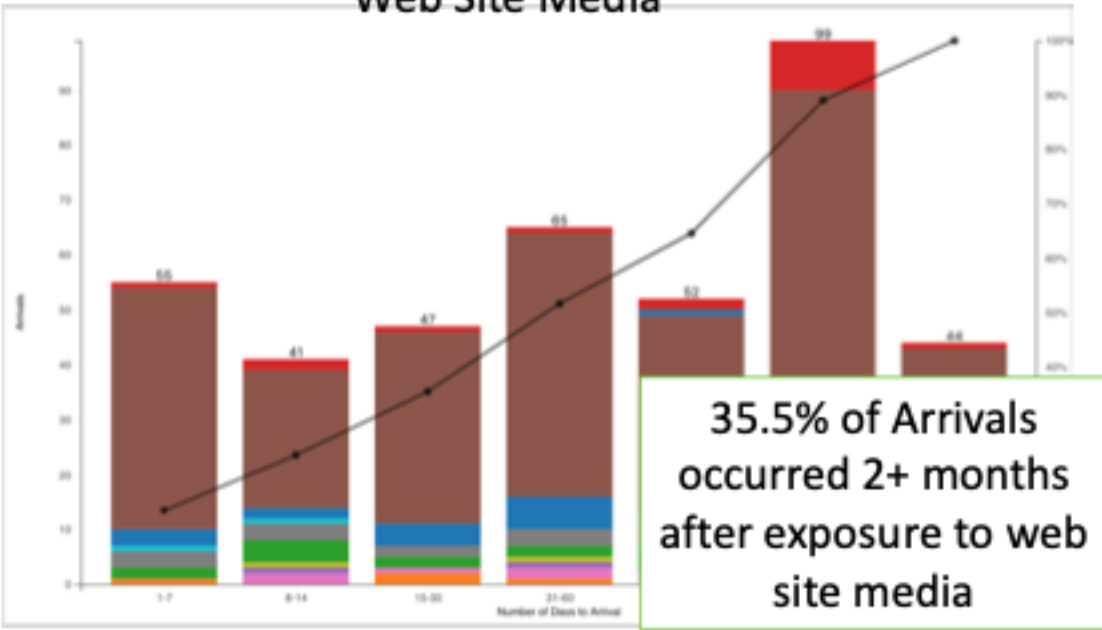
Visitors are:

25.0% from South Dakota
75.0% from outside of the state



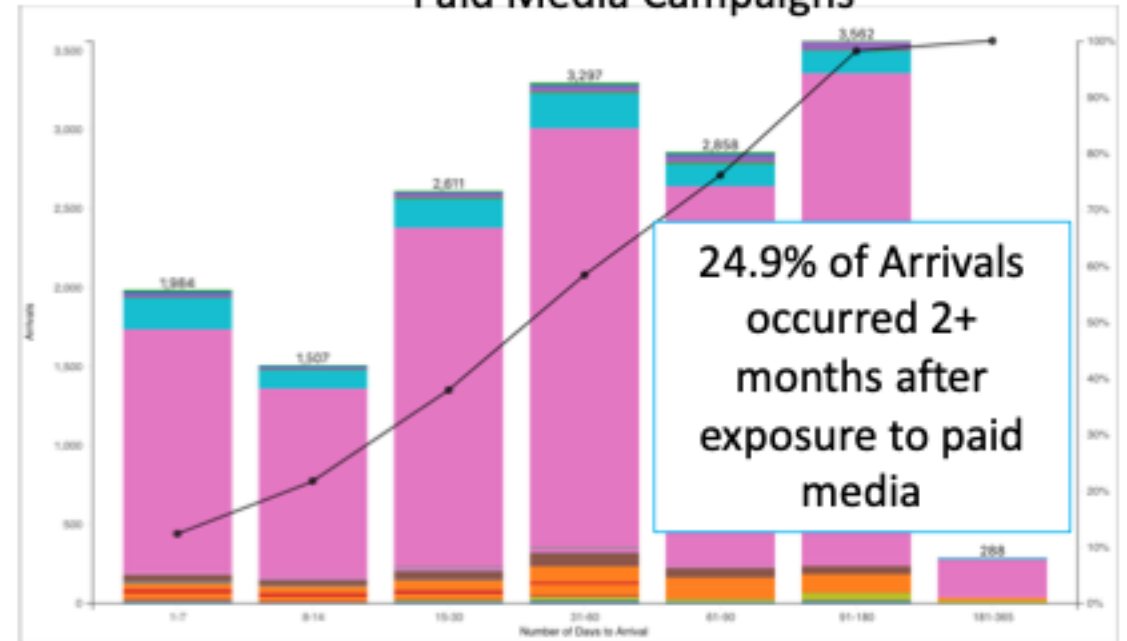
Average Time to Arrival After Exposure to Media

Web Site Media



74.4 Days to Arrival on average after exposure to web site media

Paid Media Campaigns

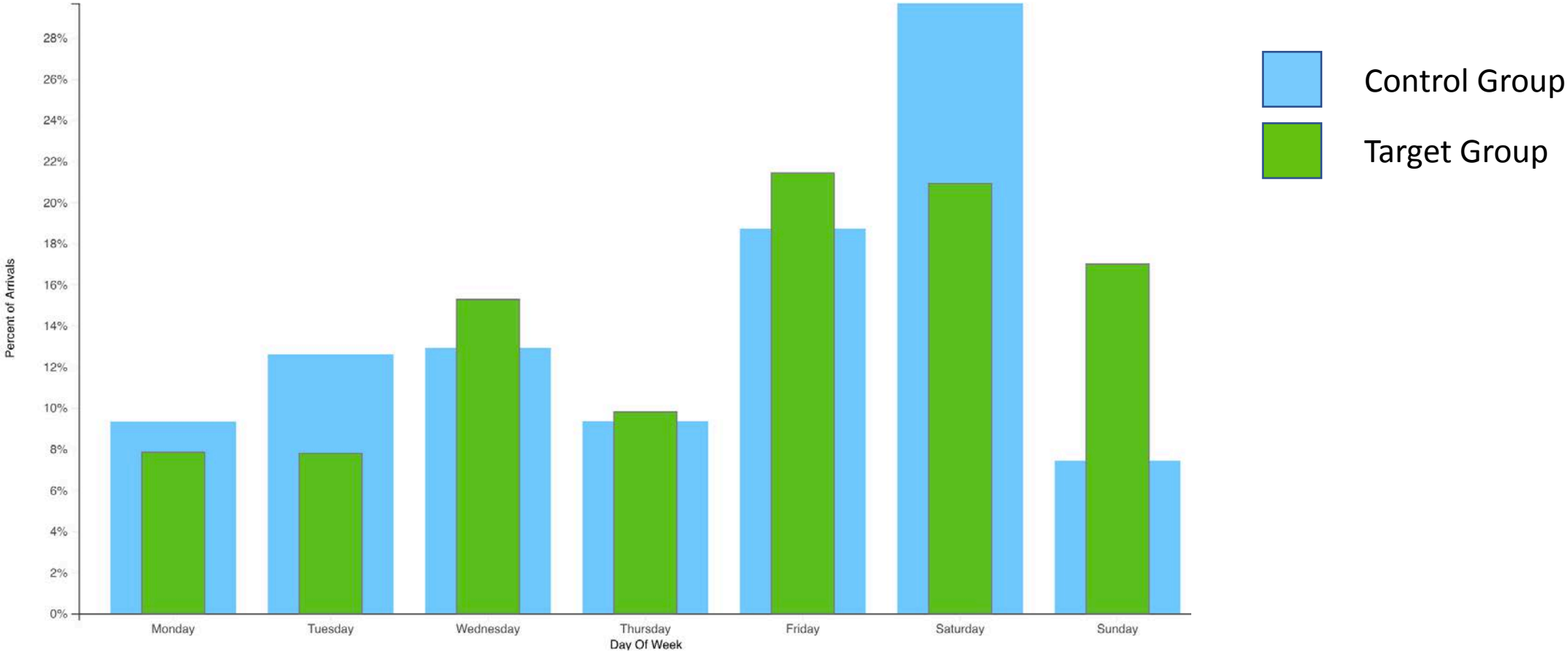


58.6 Days to Arrival on average after exposure to paid media campaigns



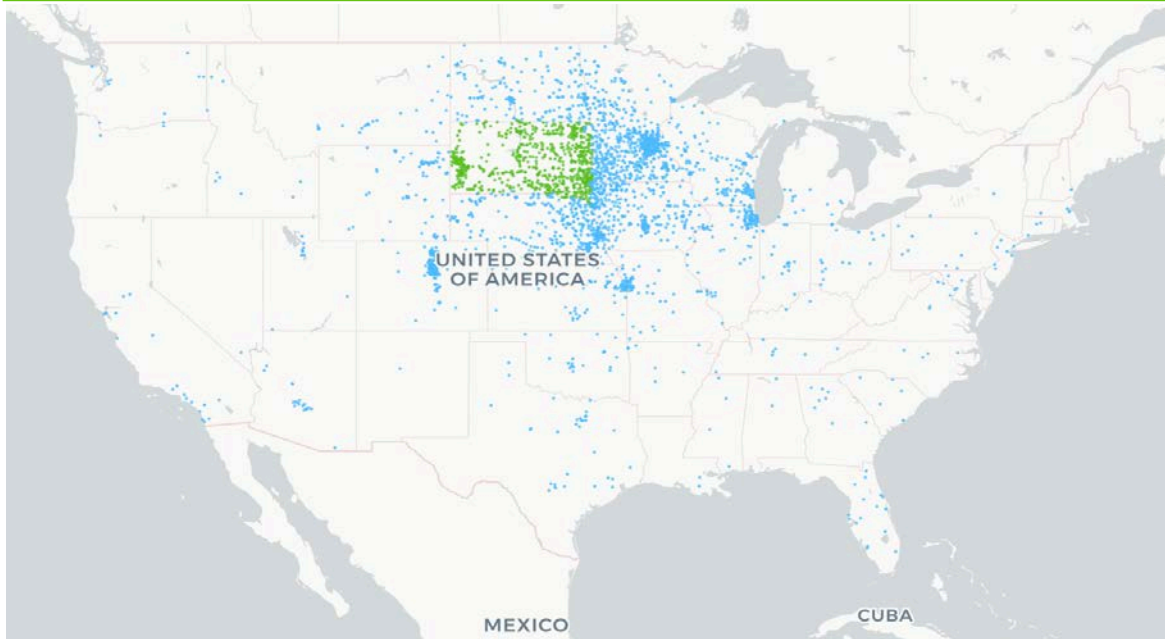
Day Of Arrival: Media Exposed vs. Unexposed Visitors

Comparing Day of Arrival for Control vs. Web Site Visitors



Future Opportunities: Unexposed / Exposed Visitation Comparison

ORIGIN POINTS EXPOSED TO MEDIA



ORIGIN POINTS UNEXPOSED TO MEDIA

