



COVID-19 RESEARCH

Updated: 8-06-20

South Dakota

DATA AND INSIGHTS PROVIDED BY

Destination  Analysts

U.S. TRAVEL
ASSOCIATION

 ARRIVALIST

 str

 Travel
Intelligence

 miles
PARTNERSHIP

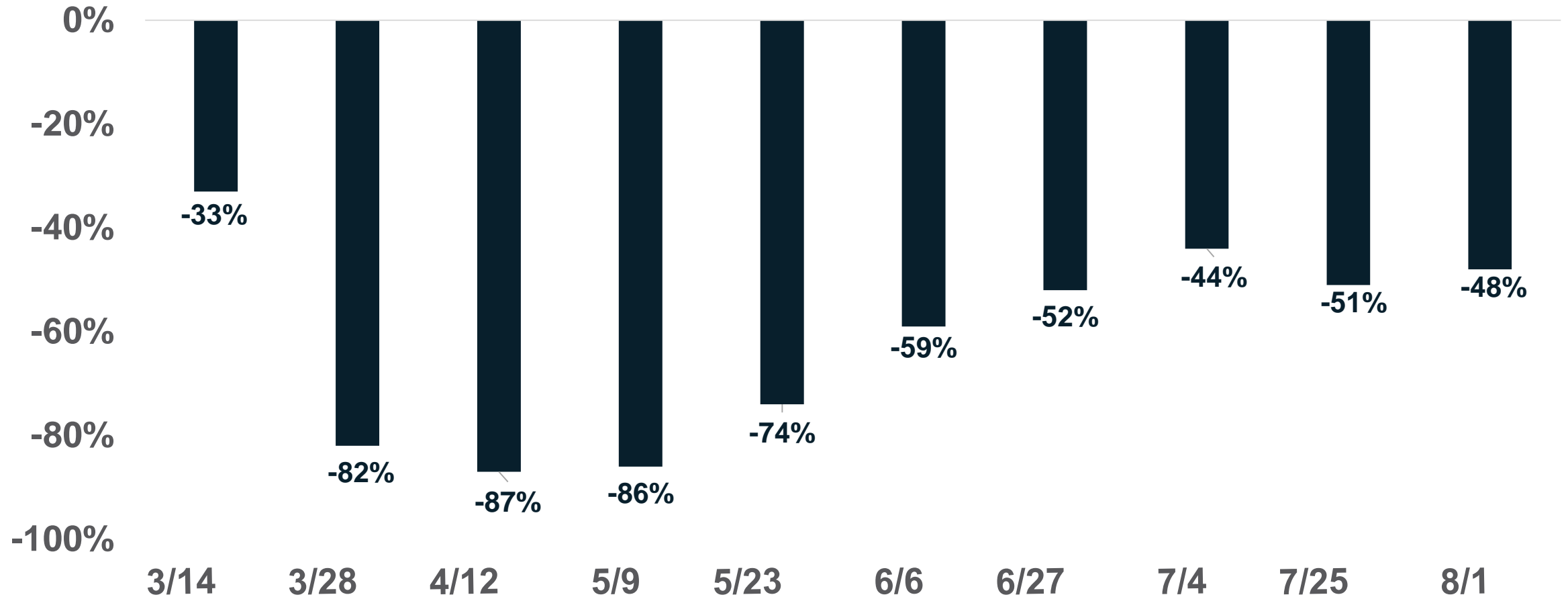
 TOURISM
ECONOMICS
AN OXFORD ECONOMICS COMPANY

 ADARA

 Longwoods
INTERNATIONAL

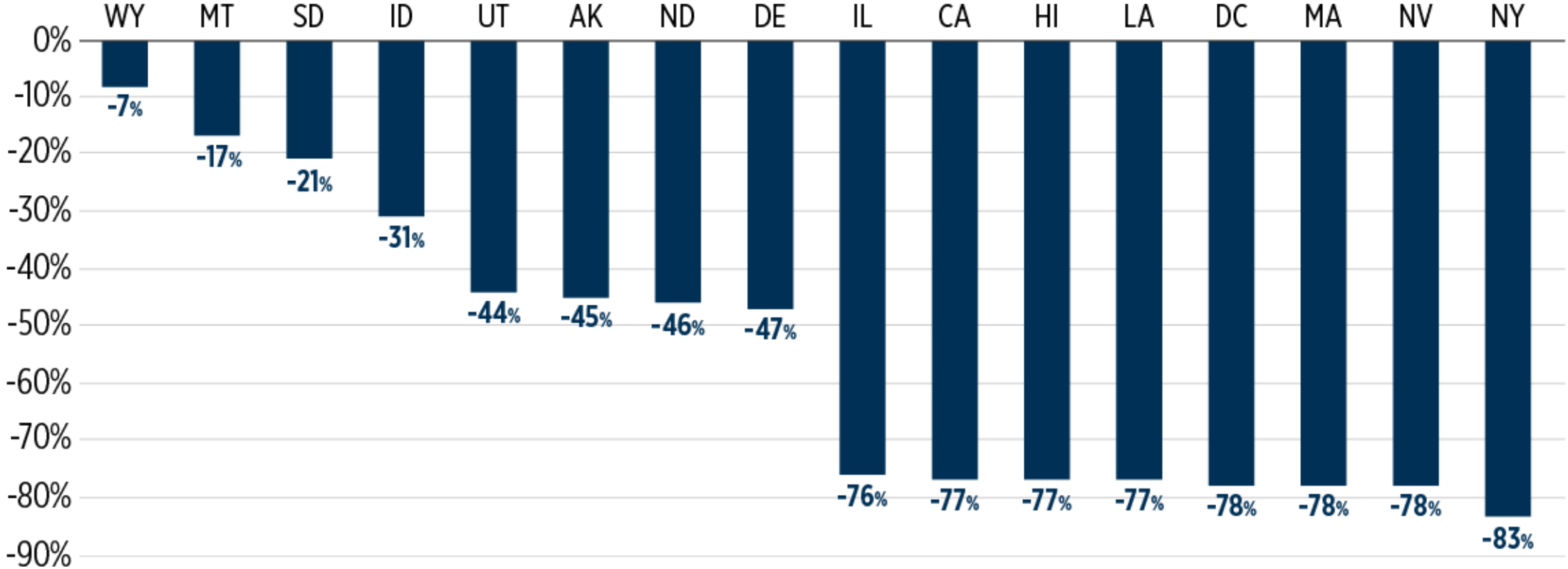
YEAR-OVER-YEAR % CHANGE

NATIONAL WEEKLY TRAVEL SPENDING



DOMESTIC BOOKINGS

STRONGEST AND WEAKEST PERFORMING STATES – WEEK OF JULY 20



YEAR-OVER-YEAR % CHANGE

REGIONAL WEEKLY TRAVEL SPENDING

| WEEK ENDING | 7/11 | 7/18 | 7/25 | 8/1 |
|-------------|------|------|------|------|
| SD | -31% | -30% | -28% | -27% |
| ND | -43% | -44% | -41% | -37% |
| IA | -39% | -39% | -43% | -36% |
| MN | -53% | -54% | -51% | -50% |
| WY | -32% | -33% | -31% | -28% |



Source: Tourism Economics, "WEEKLY CORONAVIRUS
IMPACT ON TRAVEL EXPENDITURES IN THE U.S."



HOTEL OCCUPANCY BY STATE

ACTUALS FOR MONTH OF JUNE, 2020

| STATE | OCCUPANCY | % CHANGE |
|-------|-----------|----------|
| SD | 51.0% | -31.2% |
| ND | 40.3% | -38.3% |
| IA | 41.6% | -38.9% |
| MN | 35.6% | -51.5% |
| WY | 49.5% | -32.7% |

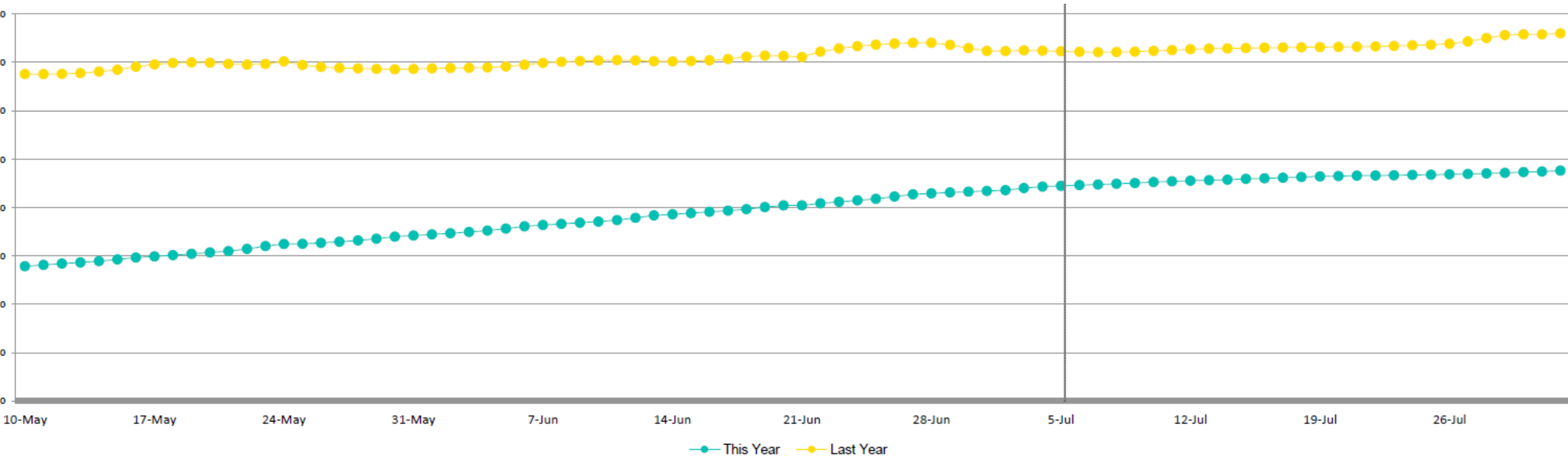
SD HOTEL OCCUPANCY BY REGION

ACTUALS FOR MONTH OF JUNE, 2020

| STATE | OCCUPANCY | % CHANGE |
|-----------|-----------|----------|
| WEST | 54.0% | -29.9% |
| SOUTHEAST | 46.3% | -36.0% |
| CENTRAL | 53.4% | -23.3% |
| NORTHEAST | 50.5% | -29.5% |

U.S. HOTEL OCCUPANCY %

AVG US HOTEL OCCUPANCY REACHED 48.9% LAST WEEK

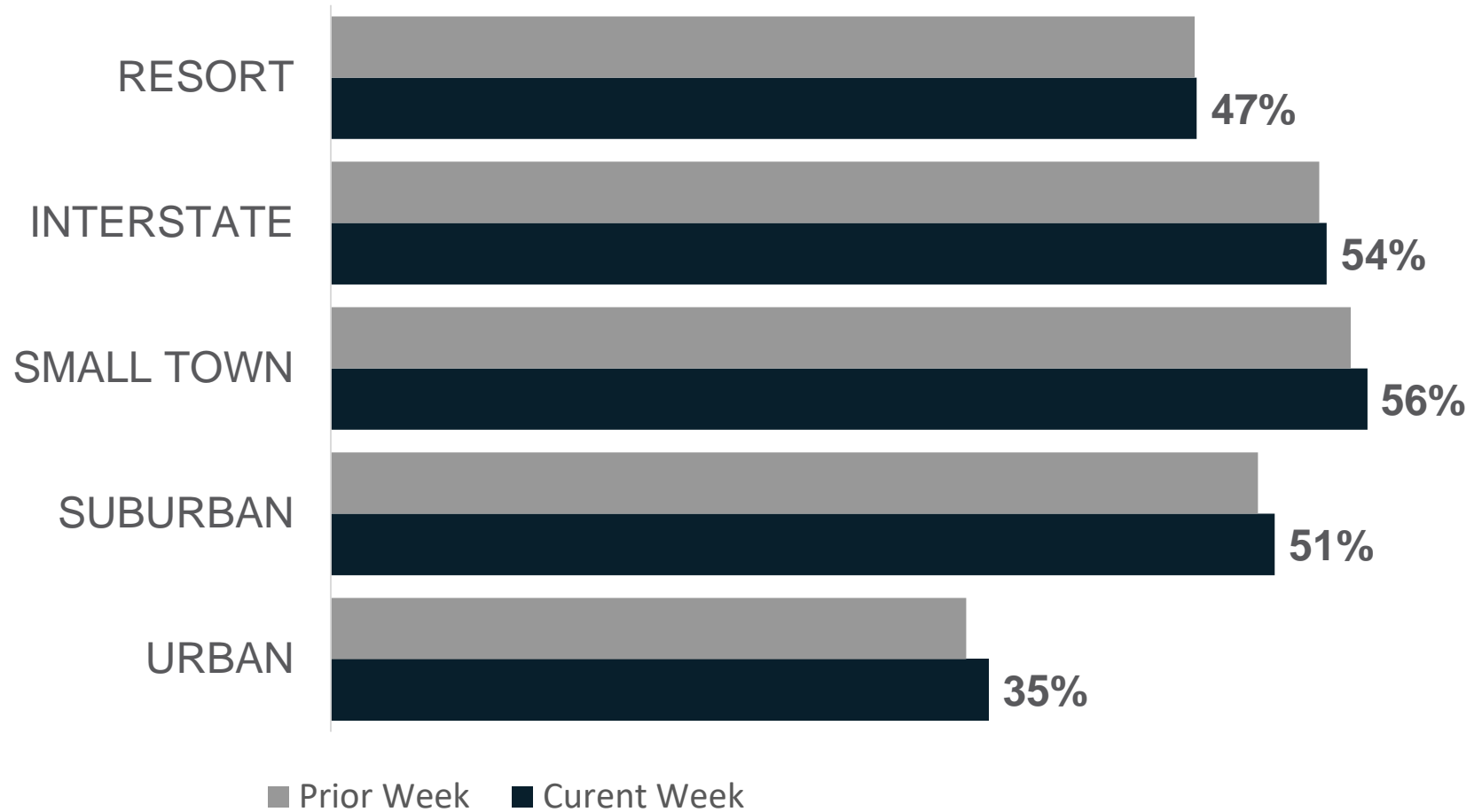


STR HOTEL REVIEW: Fielded on August 1, 2020



AVG U.S. OCCUPANCY BY LOCATION

FOR THE WEEK OF JULY 26 – AUGUST 1



ARRIVALIST DAILY TRAVEL INDEX

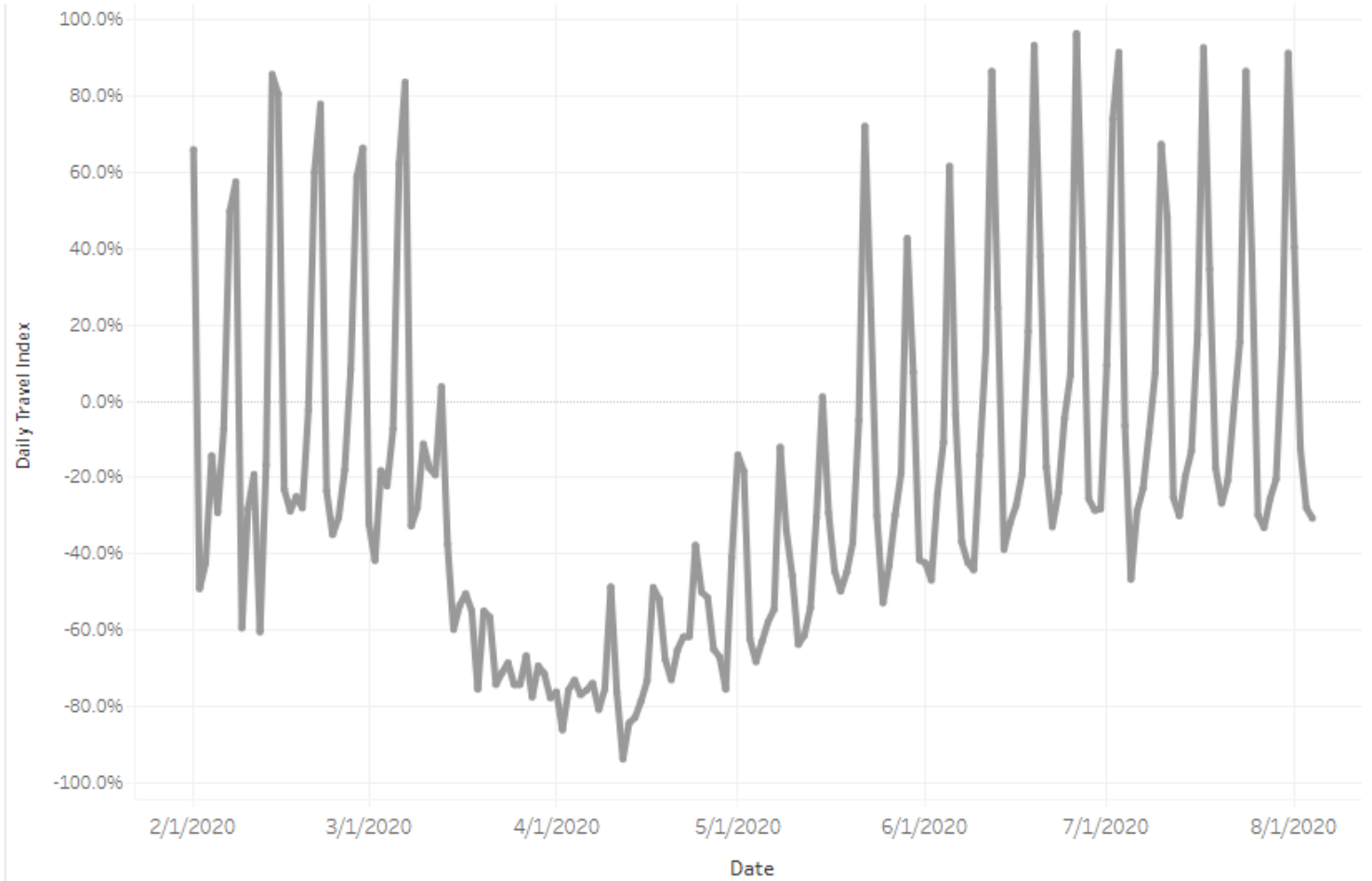
ROAD TRIPS OF 50 MILES OR MORE TO AND WITHIN SOUTH DAKOTA

Daily Travel Index

-31%

Week over Week Change

+0.7%

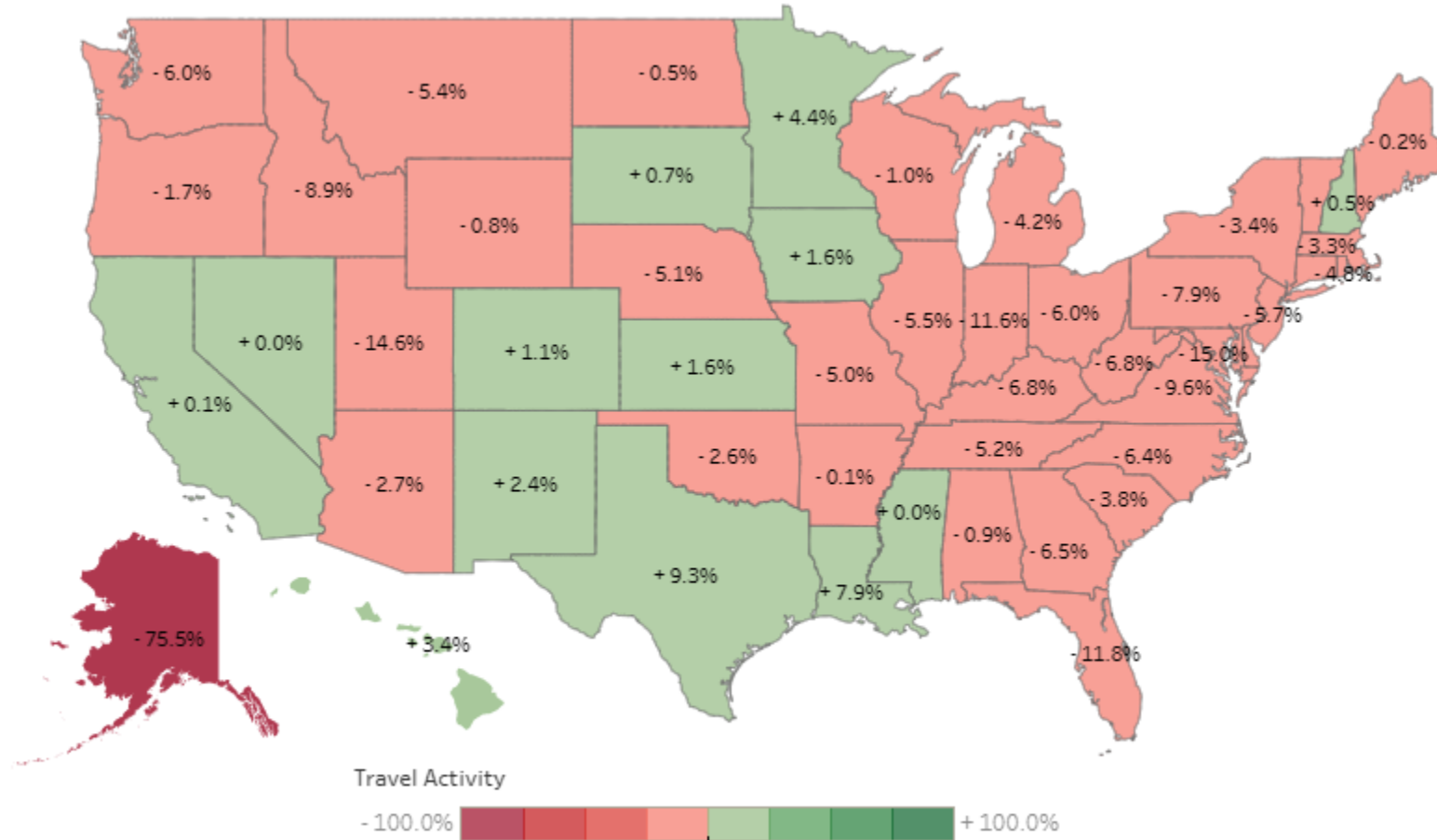


Arrivalist Daily Travel Index: August 4, 2020



ARRIVALIST TRAVEL INDEX

ROAD TRIPS OF 50 MILES OR MORE AND NON-COMMUTING – WEEK OVER WEEK CHANGE



CYTD STATE PARK VISITATION

JANUARY 1, 2020 THRU JUNE 30, 2020 VS. PRIOR YEAR

| STATE PARK | 2020 VISITS | % CHANGE |
|----------------------------|-------------|----------|
| LEWIS AND CLARK STATE PARK | 515,479 | 81% |
| CUSTER STATE PARK | 689,172 | -4% |
| OAHE DOWNSTREAM REC AREA | 175,014 | 30% |
| NEWTON HILLS STATE PARK | 93,870 | 96% |
| TOTAL PARK VISITATION | 3,514,965 | 33% |



JUNE 2020 COMISSION REPORT: This report does not represent all state parks and rec areas."



SOUTH DAKOTA TRAFFIC TRENDS

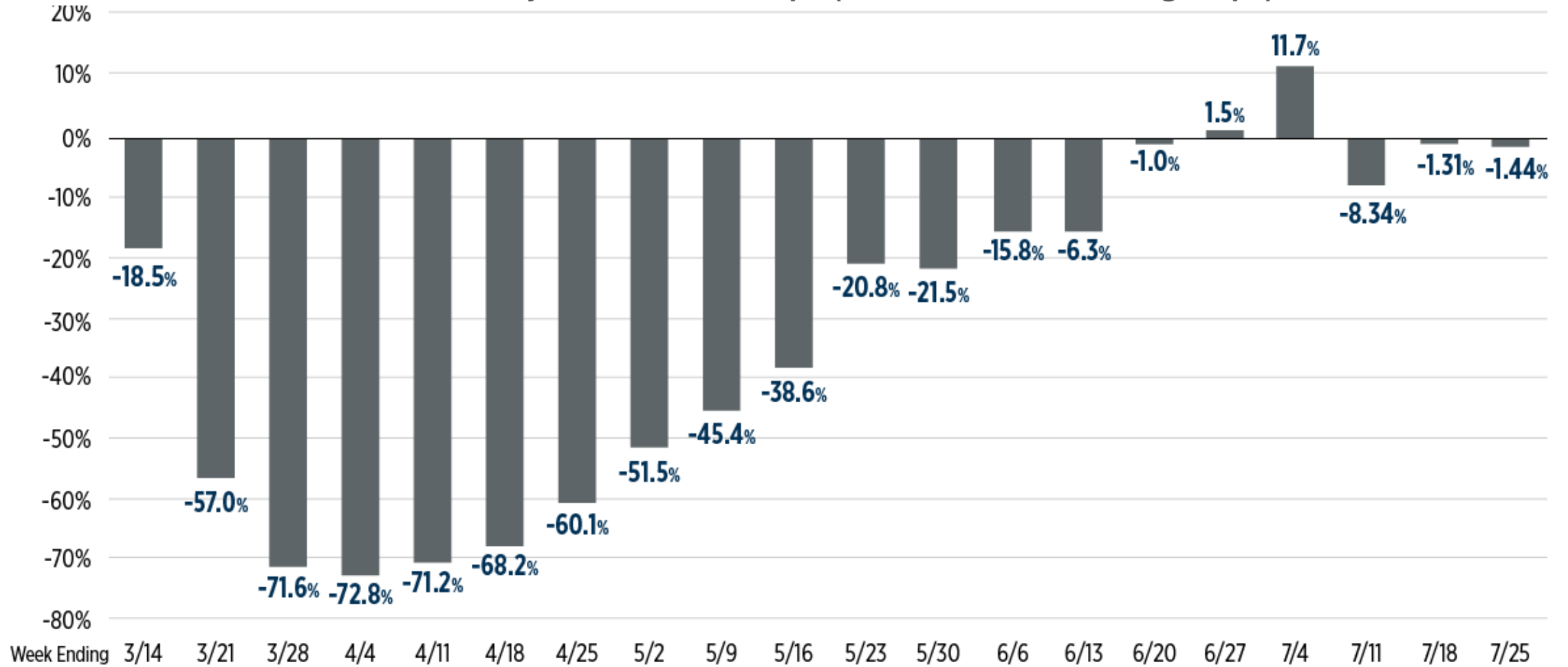
Monitored Traffic by DOT Traffic Counters

| | March | April | May | June | July |
|---------------------|-------|-------|------|------|------|
| All State Highways | -14% | -36% | -20% | -9% | -4% |
| Rural Interstate | -13% | -40% | -25% | -11% | -6% |
| Rural Noninterstate | -11% | -33% | -12% | -6% | -3% |
| Urban | -15% | -34% | -19% | -8% | -3% |



US ROAD TRIP INDEX

Arrivalist Weekly Index of Road Trips (Base: Feb 2- Feb 29 Avg. Trips)

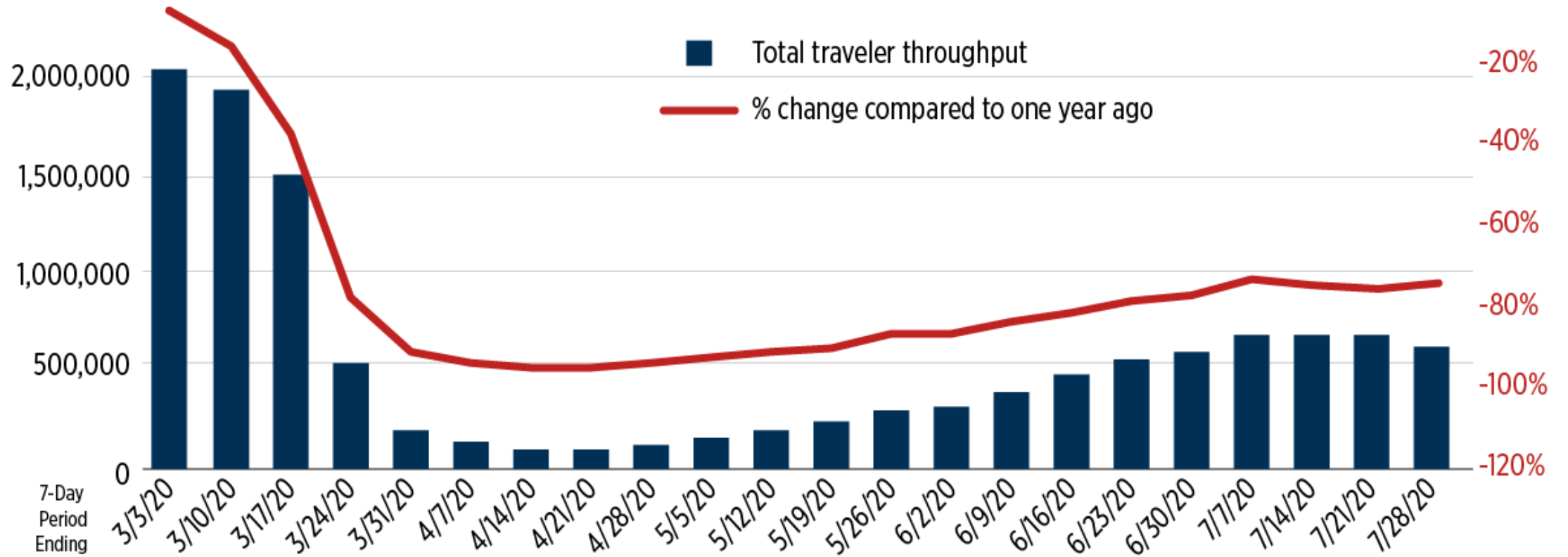


SOURCE: Arrivalist



DOMESTIC AIR TRAVEL

Number of People Screened at TSA Checkpoints – March 3 – July 28, 2020



SOURCE: TSA



Source: TSA Report July 21



SD AIRPORT DEPLANEMENTS

AIRPORT ARRIVALS CYTD THROUGH JUNE, 2020



SIOUX FALLS DEPLANEMENTS

155,550 -46%

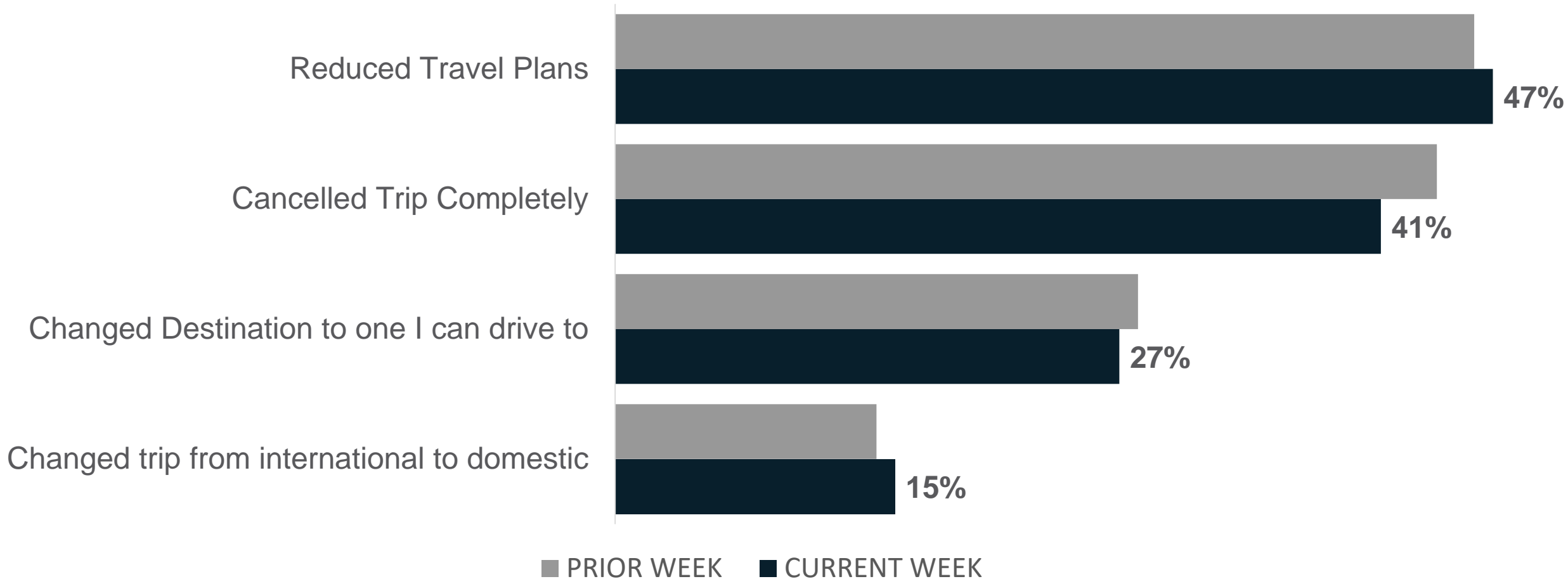


RAPID CITY DEPLANEMENTS

76,166 -50%

UPCOMING TRAVEL PLANS COMPARISON

% OF US TRAVELERS ON HOW COVID-19 HAS IMPACTED THEIR TRAVEL PLANS

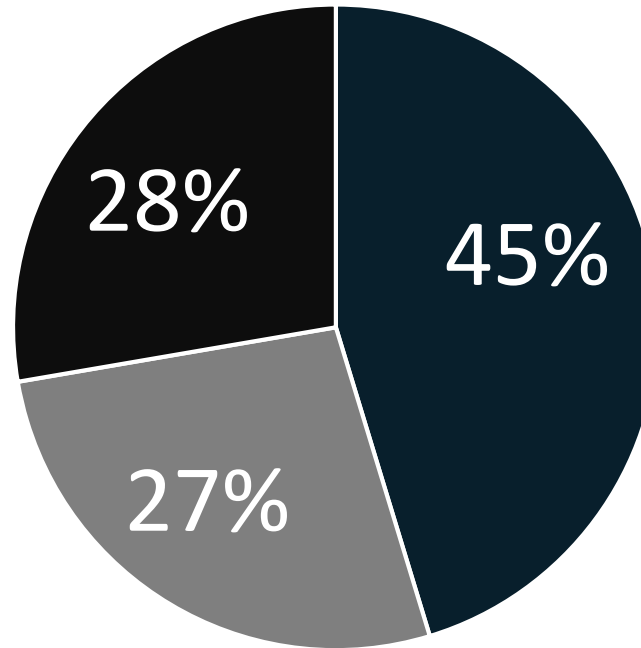


Travel Sentiment Study Wave 13: Fielded on August 4, 2020



WON'T TRAVEL WITHOUT A VACCINE

I'M NOT TRAVELING UNTIL THERE IS A VACCINE....



■ AGREE ■ DISAGREE ■ NEUTRAL

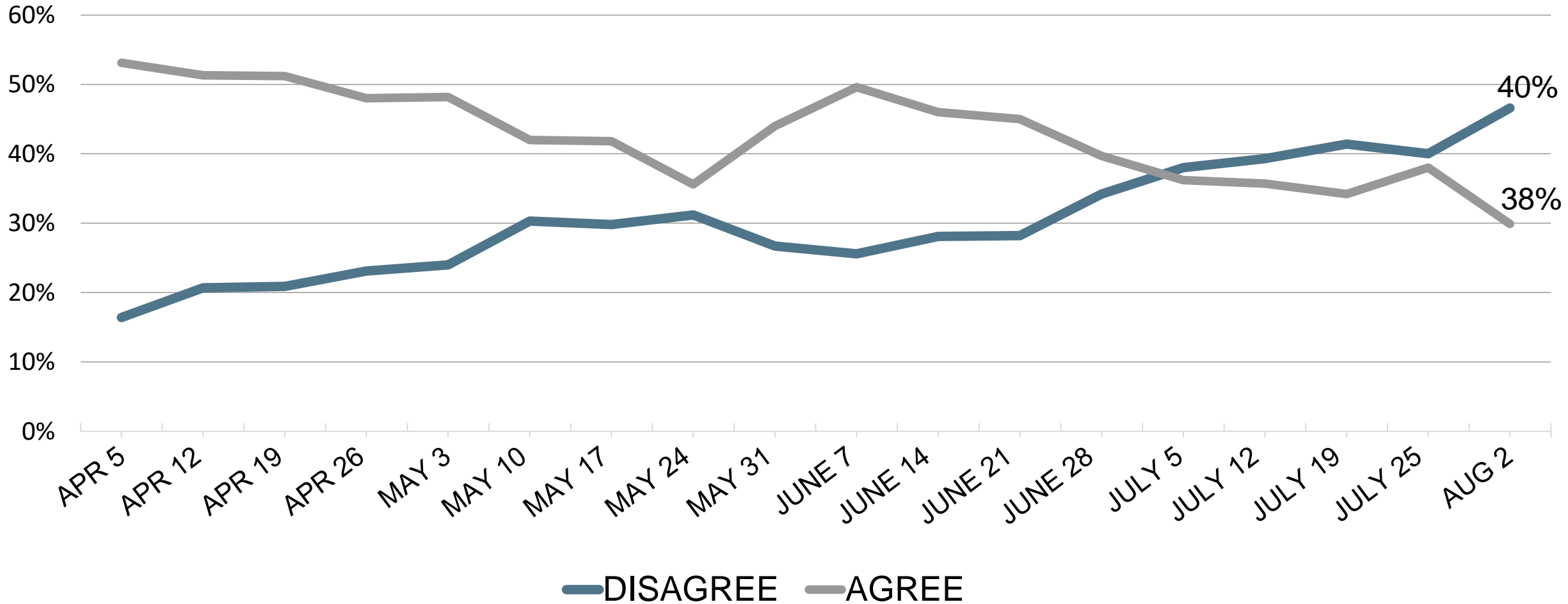


Travel Sentiment Study: Fielded on August 2, 2020*



TRAVELING IN THE FALL

I EXPECT THAT I WILL BE TRAVELING IN THE FALL....

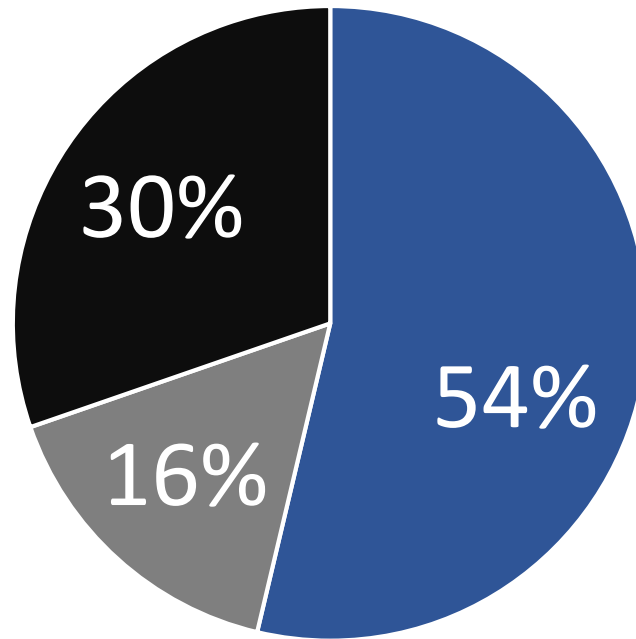


Travel Sentiment Study: Fielded on July 31 – Aug 2, 2020*



EXPECTATION FOR THE CORONAVIRUS

In the next month, how do you expect the severity of the coronavirus situation in the US to change?



■ Get Worse ■ Get Better ■ NEUTRAL

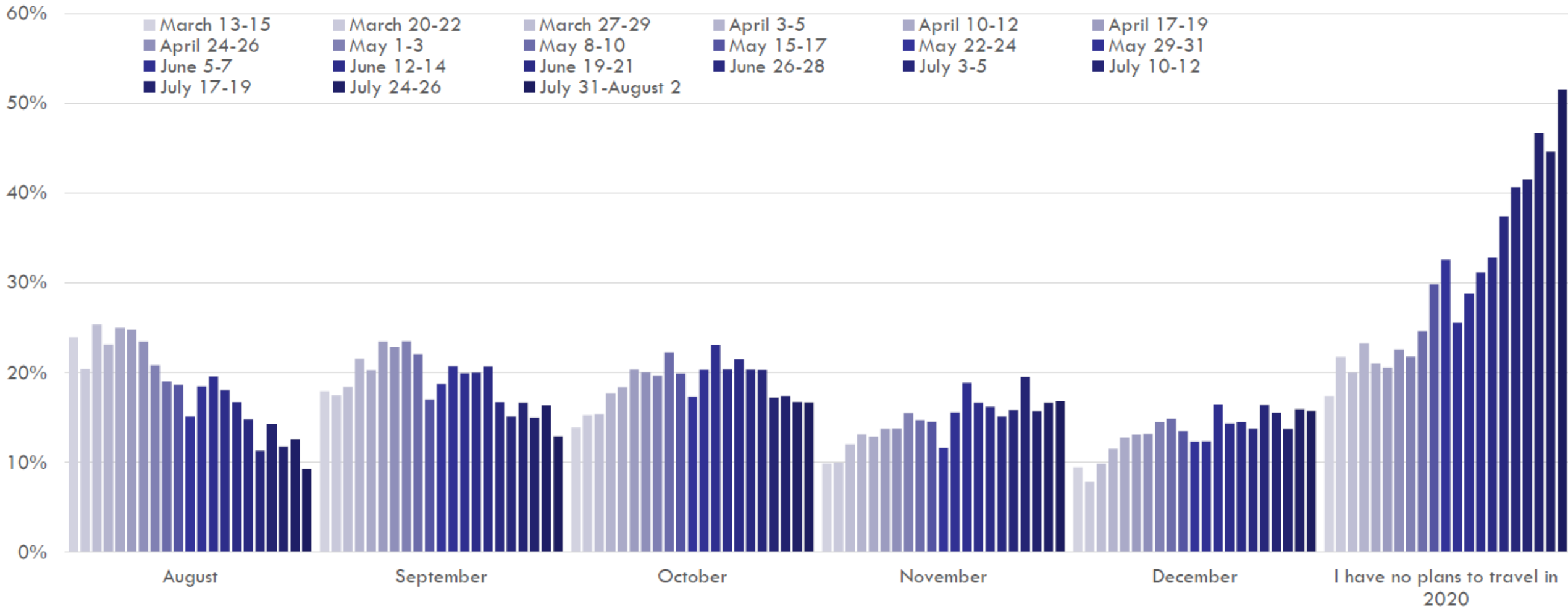


Travel Sentiment Study: Fielded on August 2, 2020*



UPCOMING TRAVEL PLANS

In which months of this year do you currently plan to take any leisure trips?

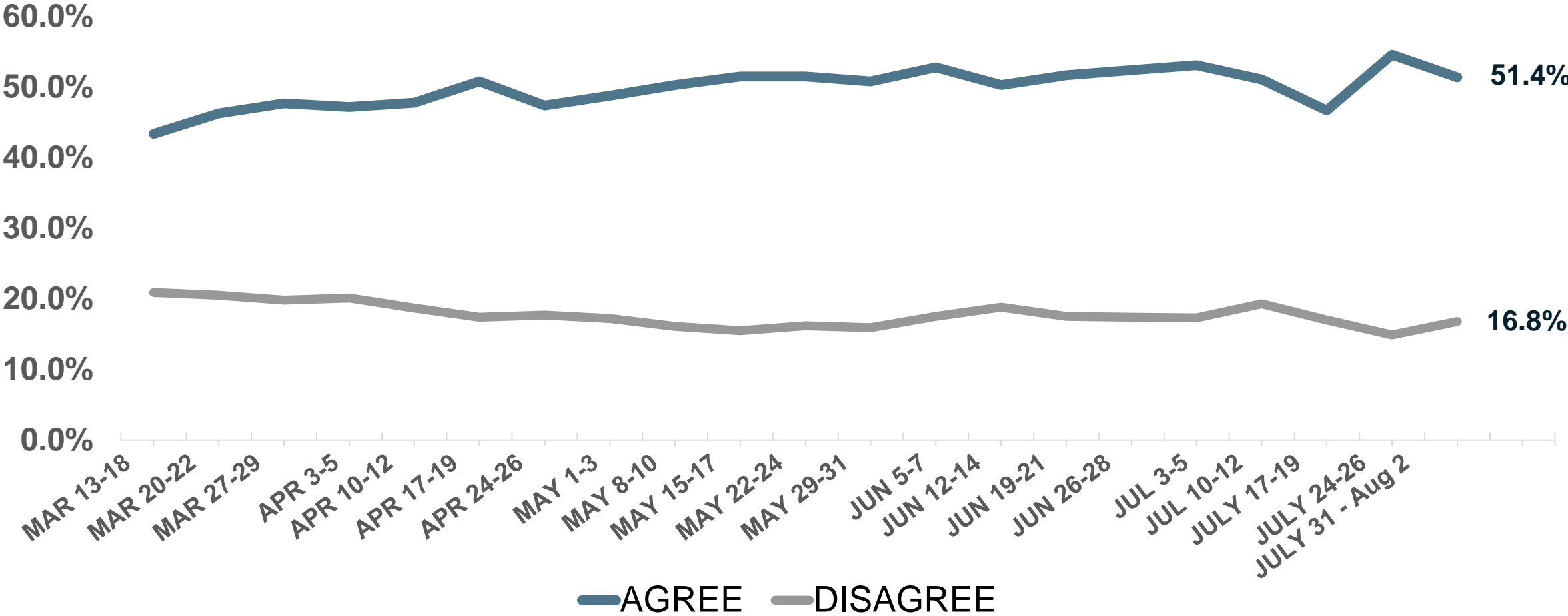


Travel Sentiment Study: Fielded on July 24-26, 2020*



LONG HAUL VS. REGIONAL TRIPS

BECAUSE OF THE CORONAVIRUS, I'LL BE TAKING MORE REGIONAL TRIPS



Travel Sentiment Study: Fielded on July 31 – Aug 2, 2020



TRAVELSOUTHDAKOTA.COM

WEBSITE TRAFFIC AND ENGAGEMENT – July 26 – August 1, 2020 VS. PRIOR YEAR

+69%
SESSIONS

+69%
PAGEVIEWS

-4%
BOUNCE RATE

