



COVID-19 RESEARCH

Updated: 12-18-20

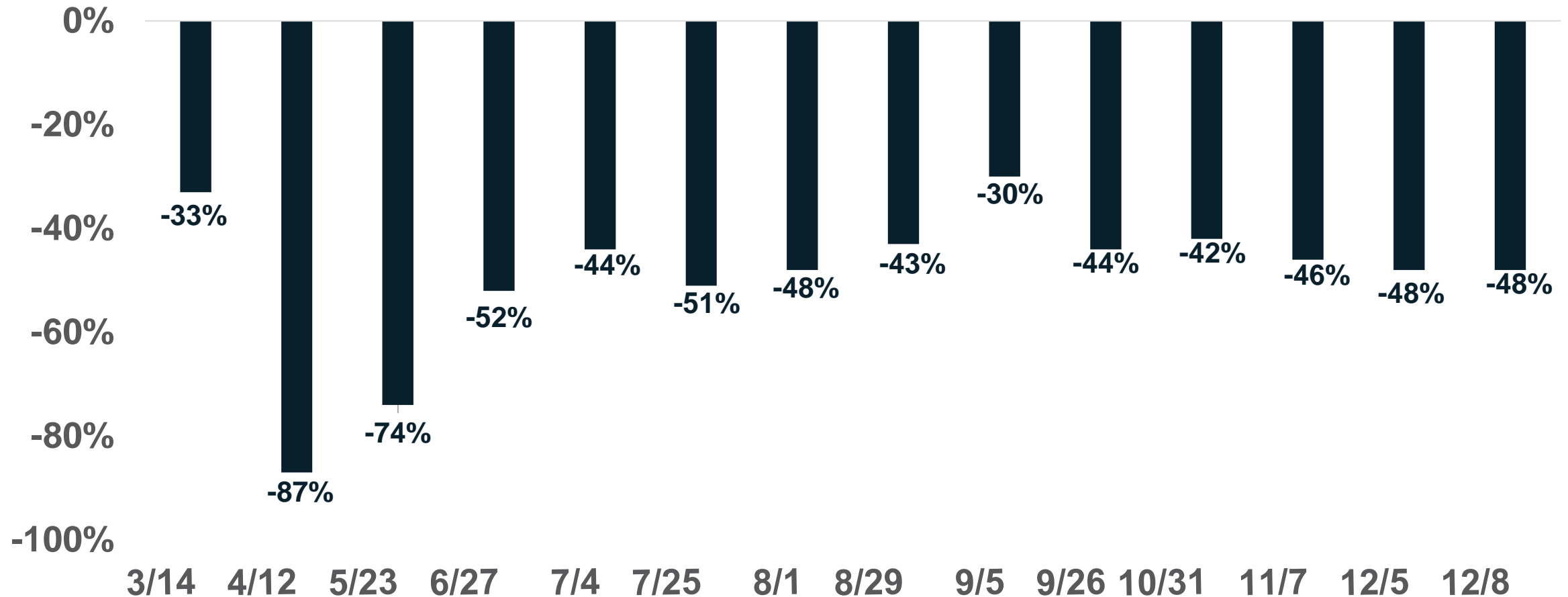
South Dakota

DATA AND INSIGHTS PROVIDED BY



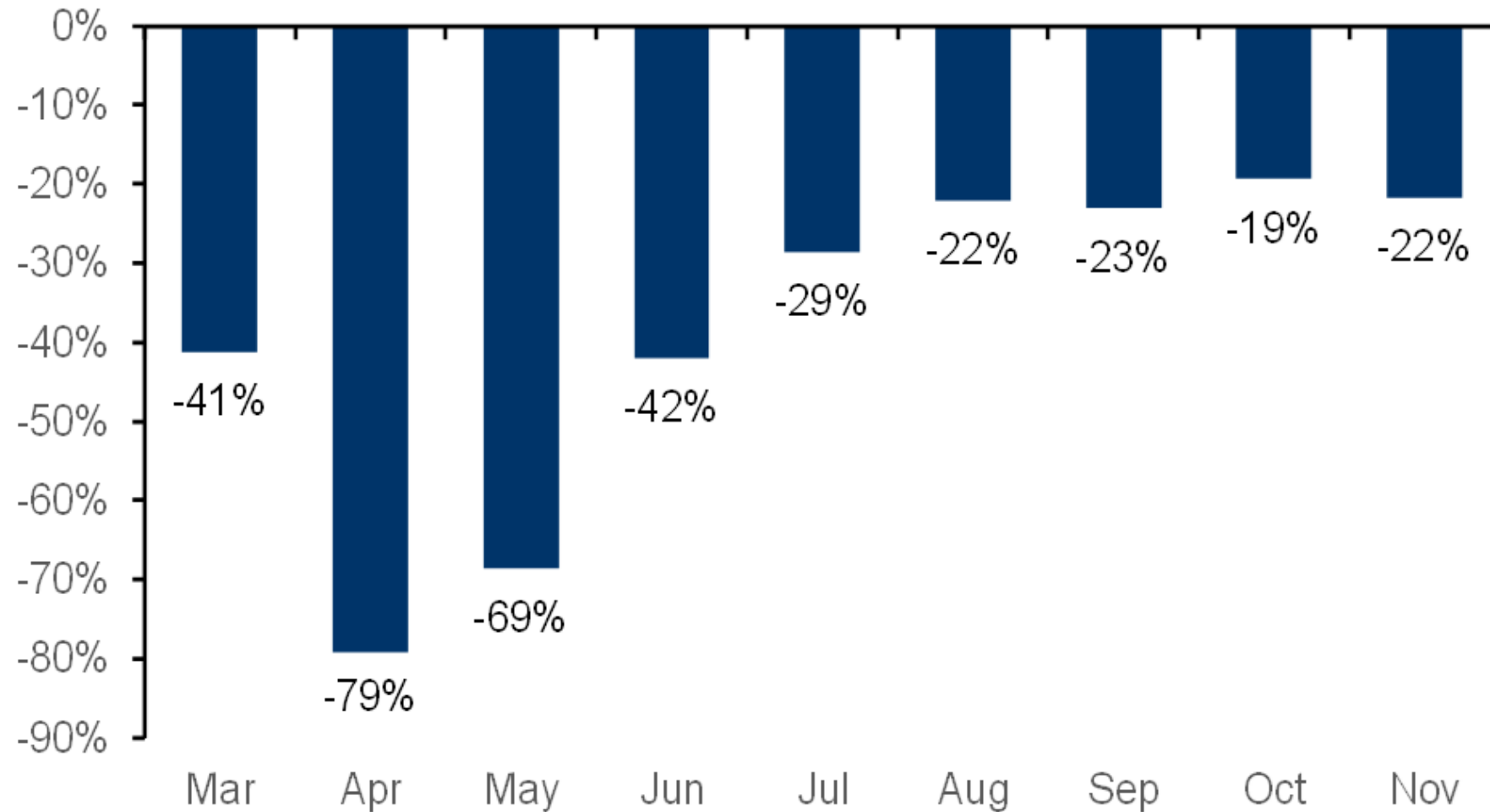
YEAR-OVER-YEAR % CHANGE

NATIONAL WEEKLY TRAVEL SPENDING



SOUTH DAKOTA TRAVEL SPENDING

YEAR OVER YEAR PERCENT CHANGE

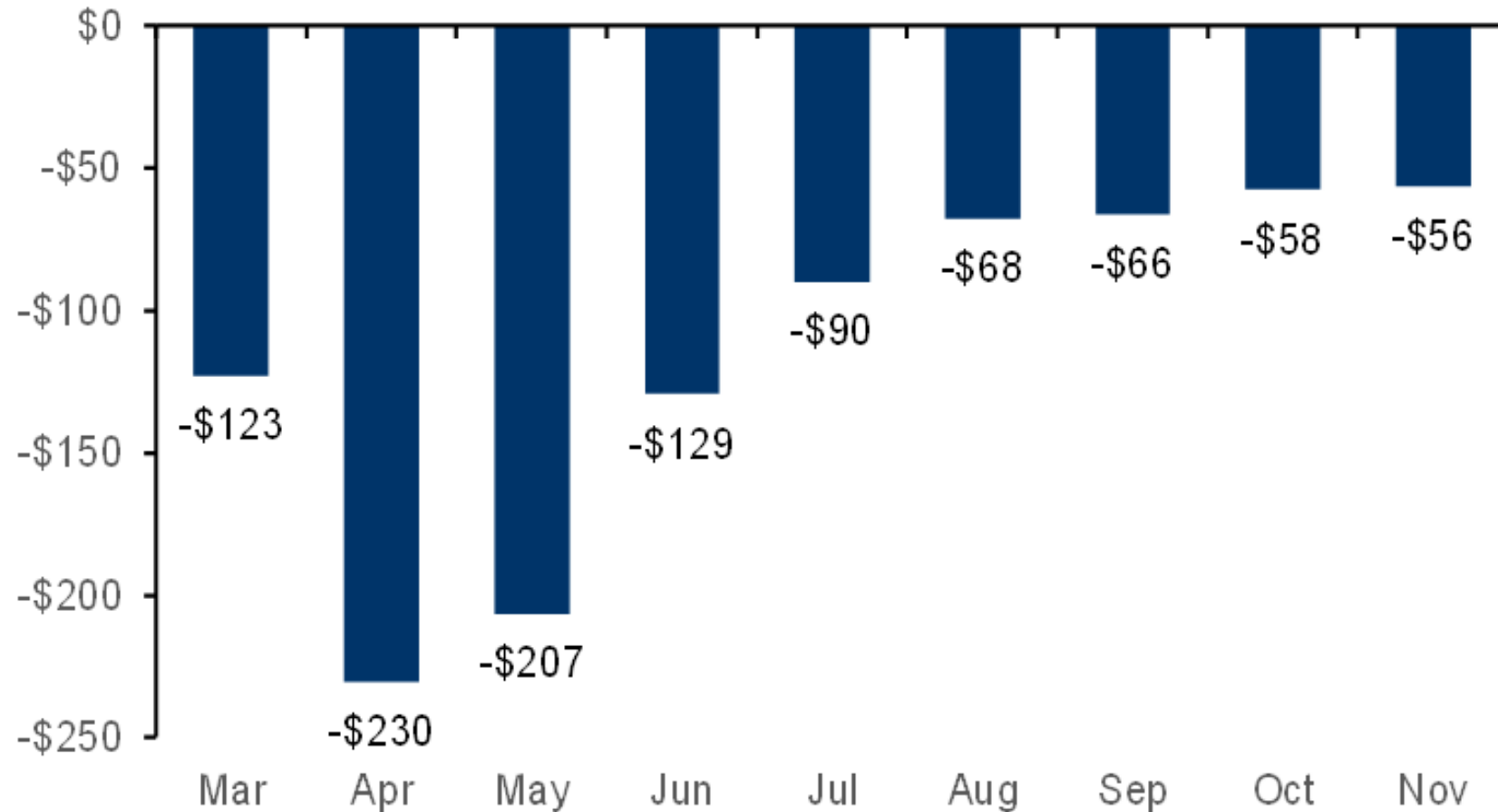


Source: Tourism Economics, "WEEKLY CORONAVIRUS
IMPACT ON TRAVEL EXPENDITURES IN THE U.S."



SOUTH DAKOTA TRAVEL SPENDING

YEAR OVER YEAR CHANGE, IN \$ MILLIONS

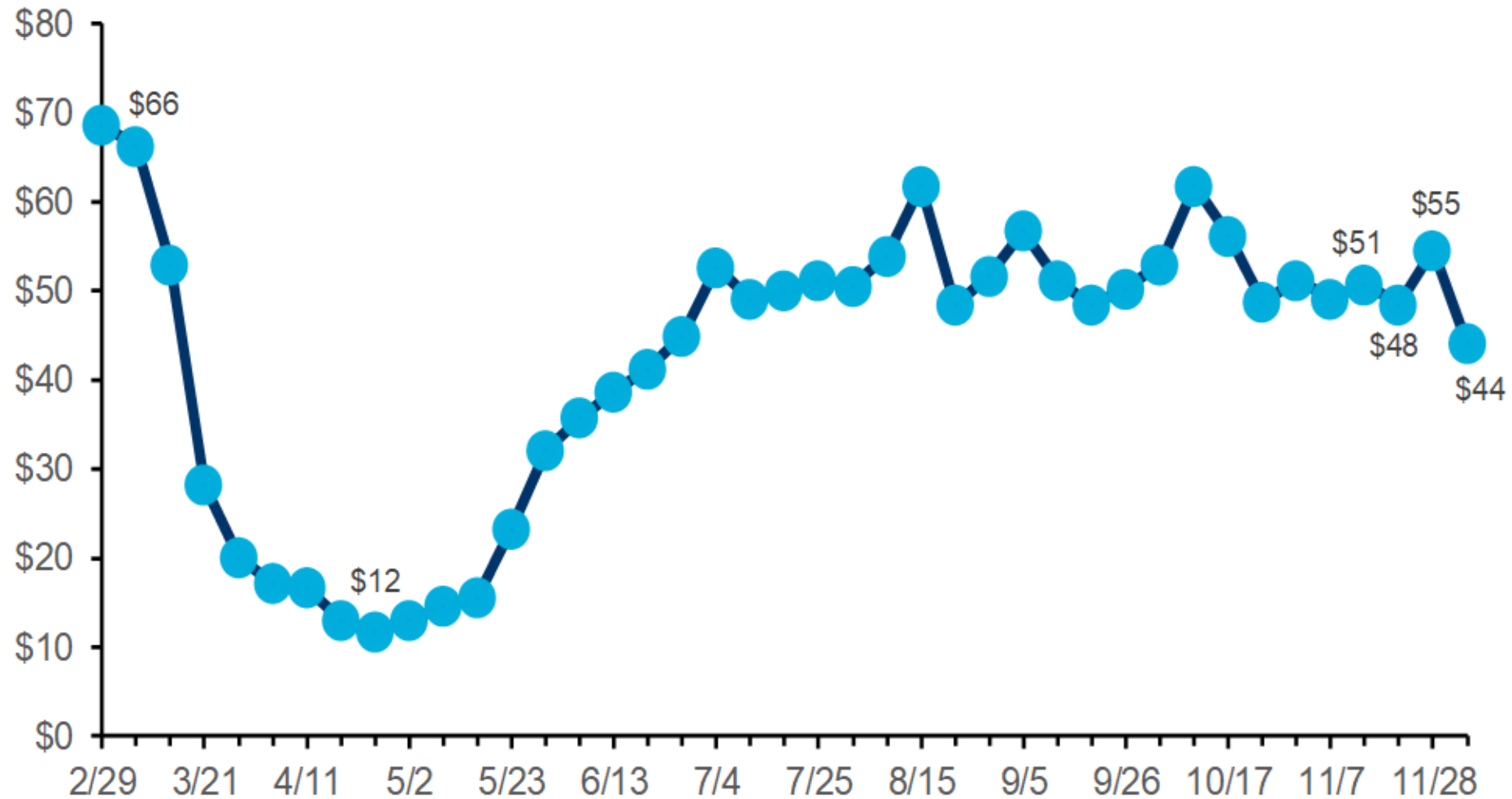


Source: Tourism Economics, "WEEKLY CORONAVIRUS
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SOUTH DAKOTA TRAVEL SPENDING

IN \$ MILLIONS



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

YEAR-OVER-YEAR % CHANGE

REGIONAL WEEKLY TRAVEL SPENDING

WEEK ENDING	11/21	11/28	12/5	12/8
SD	-25%	-16%	-31%	-25%
ND	-38%	-35%	-40%	-37%
IA	-38%	-38%	-40%	-53%
MN	-49%	-46%	-53%	-53%
WY	-35%	-24%	-34%	-34%



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



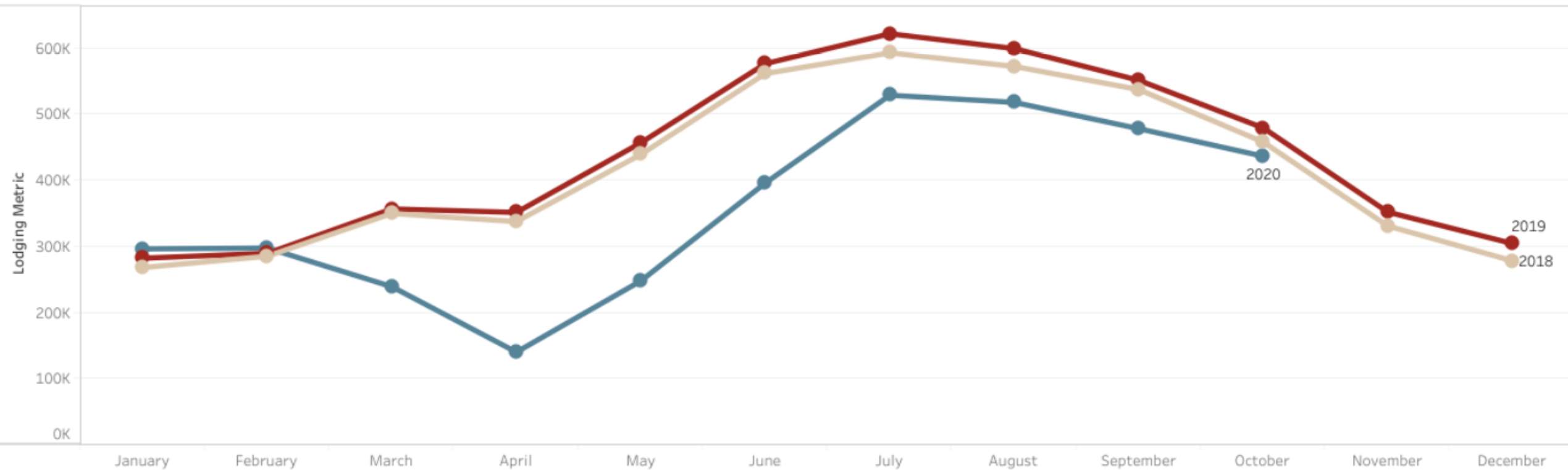
HOTEL OCCUPANCY BY STATE

ACTUALS FOR MONTH OF NOVEMBER, 2020

STATE	OCCUPANCY	% CHANGE
SD	41.0%	-15.0%
ND	34.1%	-31.5%
IA	36.0%	-26.9%
MN	29.9%	-42.1%
WY	33.2%	-23.9%
US AVG.	40.3%	-34.5%

SOUTH DAKOTA HOTEL ROOM NIGHTS

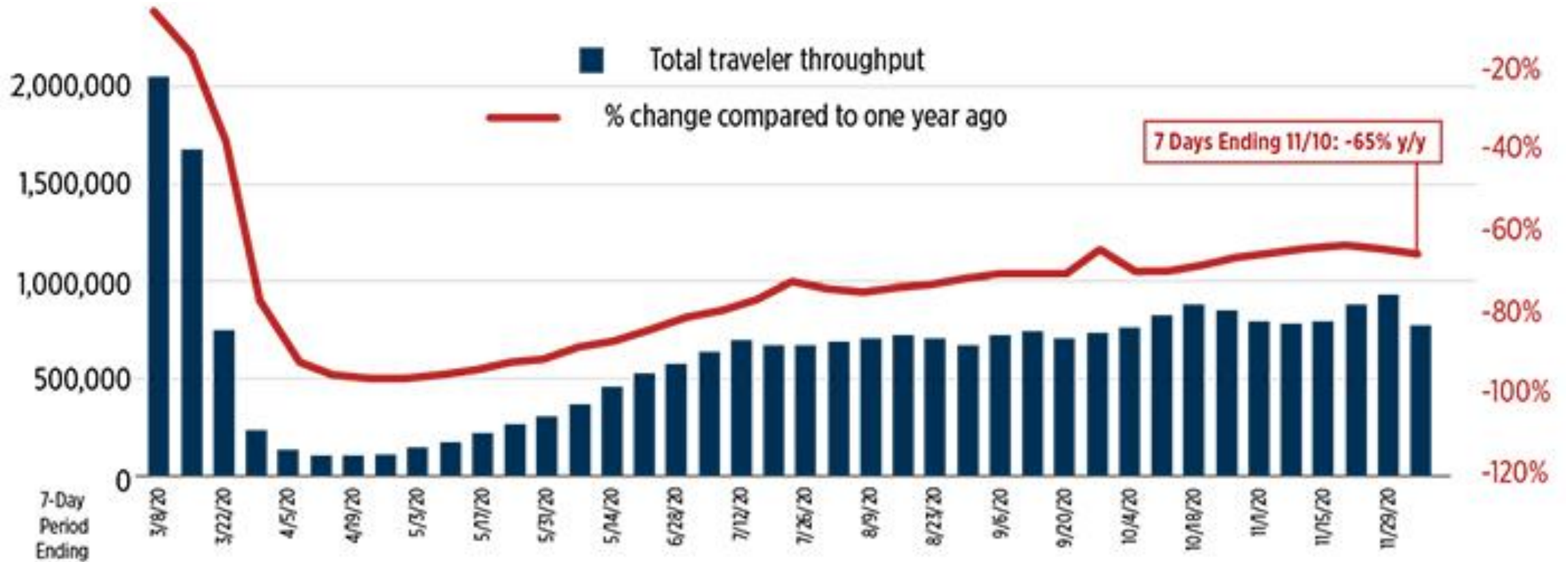
JAN – OCT 2020 VS. PRIOR YEAR



-22% YTD

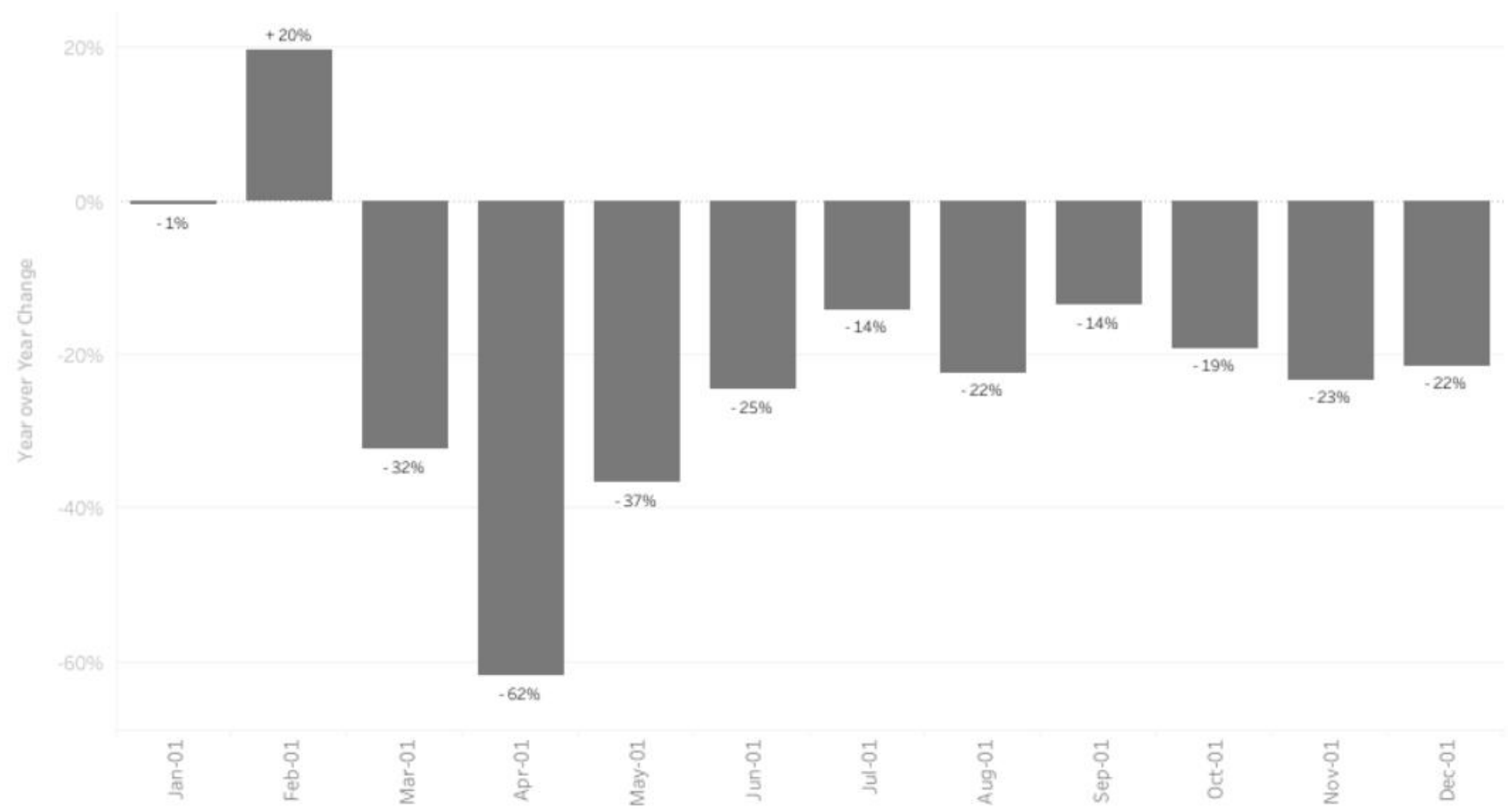


US DOMESTIC AND INTERNATIONAL BOOKINGS



ARRIVALIST DAILY TRAVEL INDEX - SD

ROAD TRIPS OF 50 MILES OR MORE AND SPENT MINIMUM OF 2 HOURS WITHIN SOUTH DAKOTA

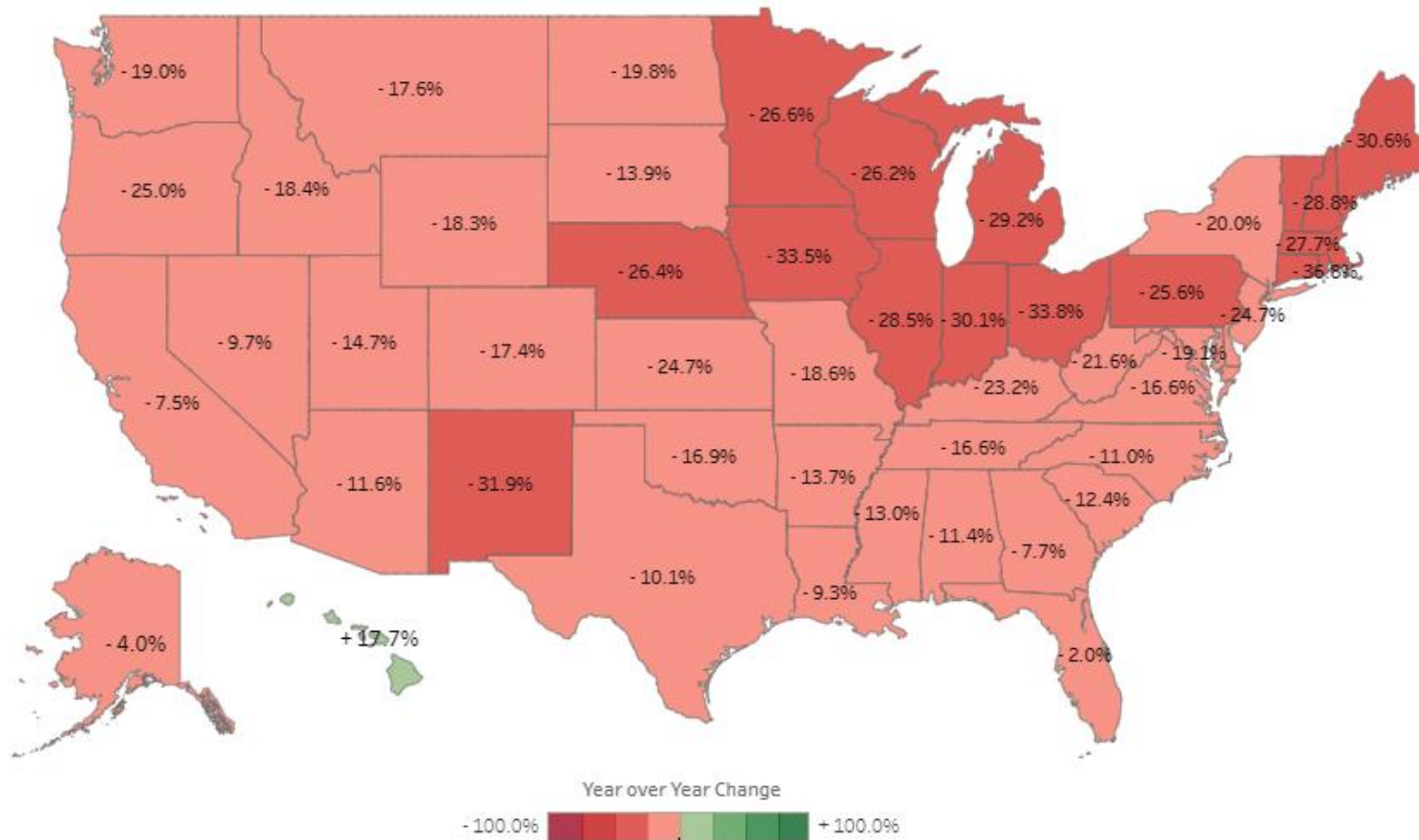


Daily drive market index of US travelers who moved at least 50 miles from home and spent a minimum of 2 hours on their journey. The Year over Year is based on relative Index change to 2019.



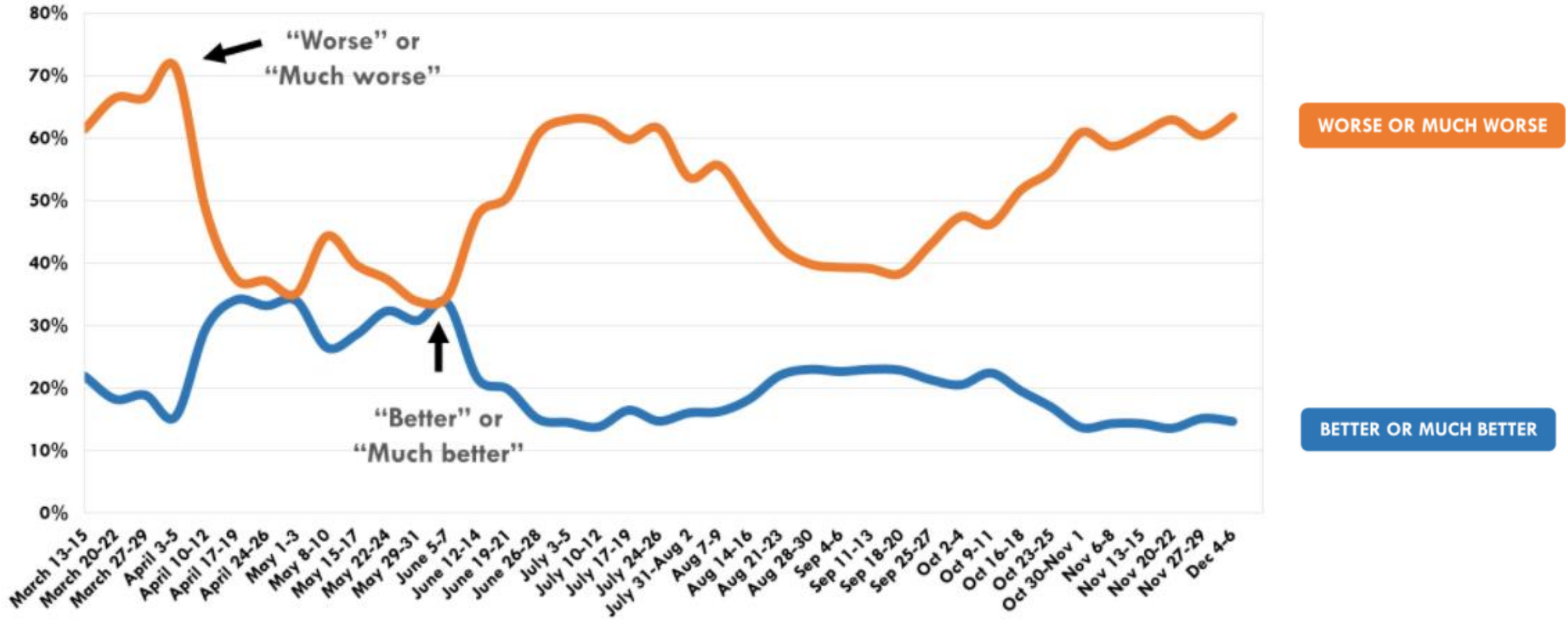
ARRIVALIST DAILY TRAVEL INDEX

ROAD TRIPS OF 50 MILES OR MORE AND SPENT MINIMUM OF 2 HOURS AWAY
LAST 30 DAYS VS. PRIOR YEAR



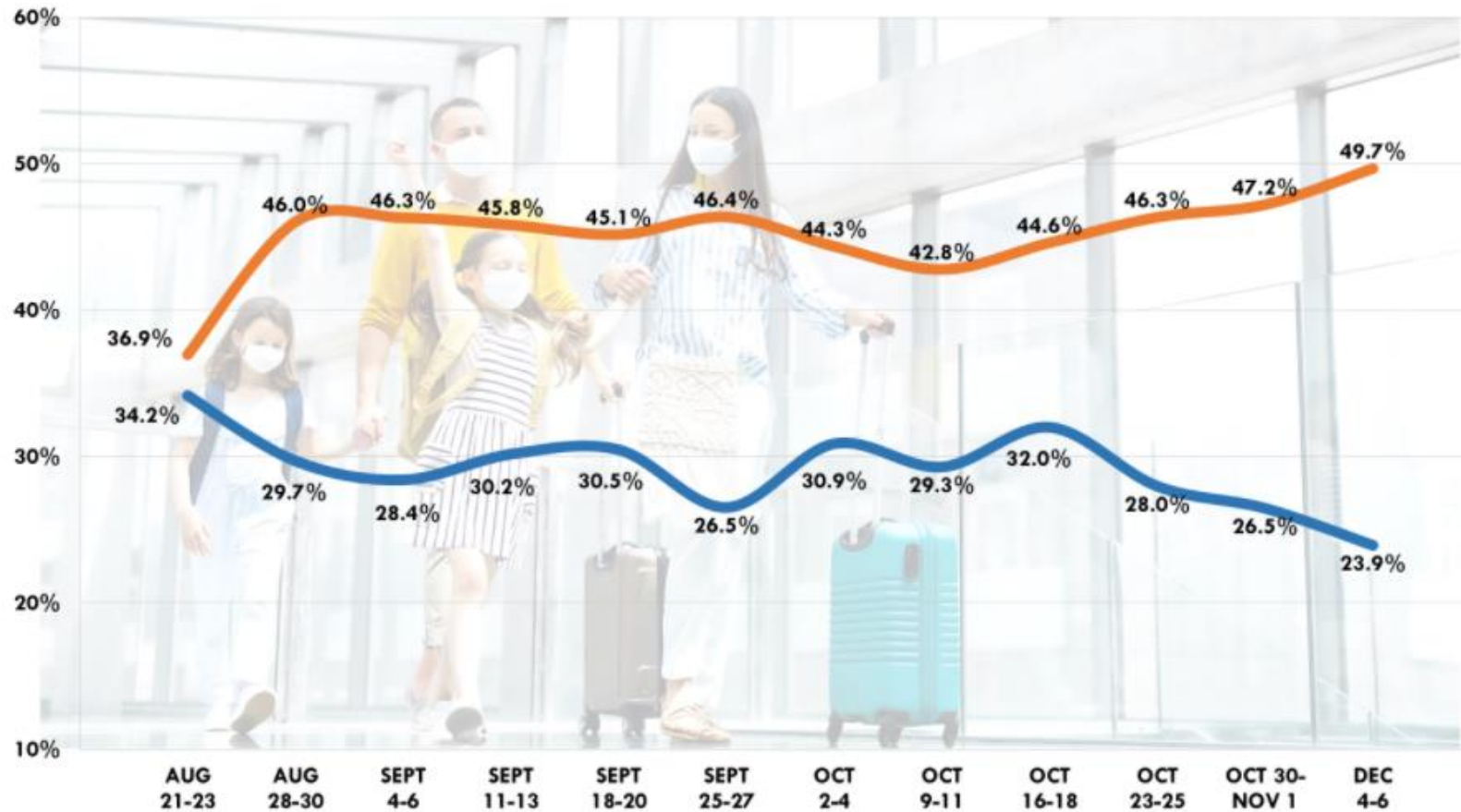
EXPECTATIONS FOR CORONAVIRUS

IN THE NEXT MONTH, HOW DO YOU EXPECT THE SEVERITY OF THE VIRUS TO CHANGE IN THE US



CONFIDENCE IN TRAVELING SAFELY

HOW CONFIDENT ARE YOU THAT YOU CAN TRAVEL SAFELY IN THE CURRENT ENVIRONMENT?



NOT VERY CONFIDENT OR
NOT CONFIDENT AT ALL

CONFIDENT OR
VERY CONFIDENT

WORKCATIONS

“Well over a third of Americans whose job allows them to telecommute say they are likely to take a “workcation in 2021”

TRAVELSOUTHDAKOTA.COM

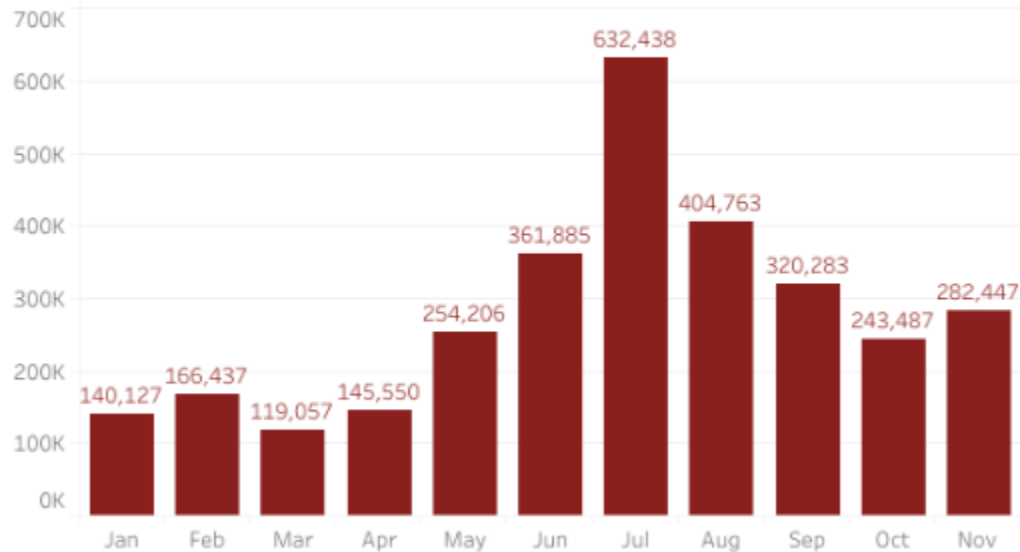
WEBSITE TRAFFIC AND ENGAGEMENT – JAN 1 THRU DEC 13, 2020 VS. PRIOR YEAR

+61%
SESSIONS

+39%
PAGEVIEWS

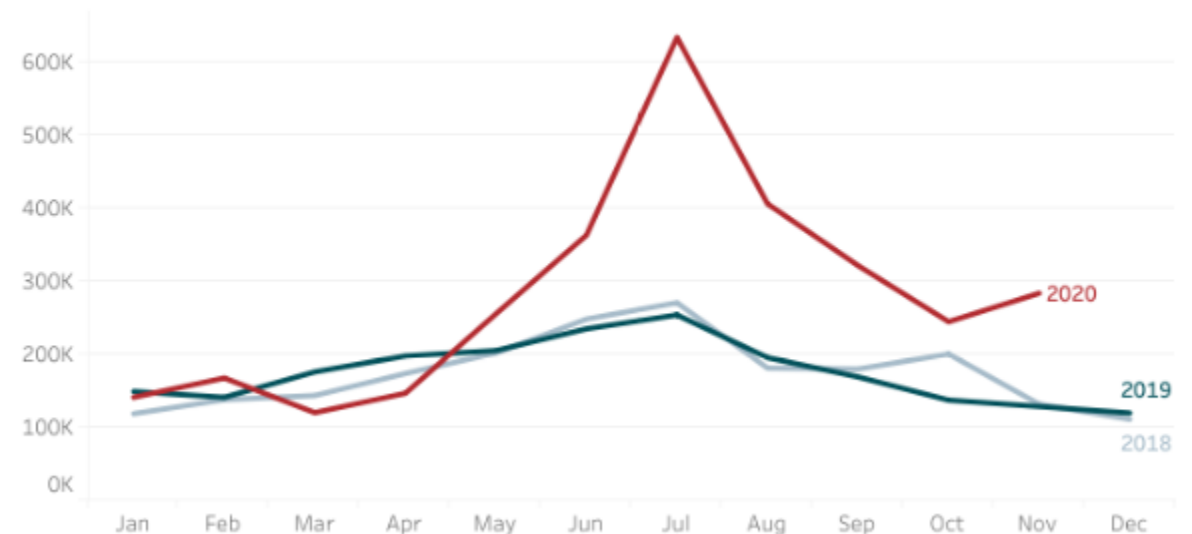
+35%
GOAL COMPLETIONS

Web Sessions



KPI Performance: Sessions
FY 2019 FY 2020

Website KPI Select
Sessions



US TRAVEL FORECAST - GROWTH

	2018	2019	2020	2021	2022	2023	2024
Total Travel Spending in the U.S.	4.9%	3.5%	-45.2%	37.3%	14.0%	7.9%	5.5%
U.S. Residents	5.5%	4.4%	-40.2%	35.0%	11.0%	6.1%	4.7%
Business	2.6%	3.1%	-55.0%	86.0%	1.6%	4.2%	3.0%
Leisure	6.9%	5.0%	-33.9%	20.2%	15.2%	6.8%	5.4%
International Visitors ¹	1.1%	-1.8%	-77.0%	75.0%	52.0%	25.0%	11.5%
Total International Visitors to the U.S.	3.3%	-0.6%	-76.0%	73.2%	59.2%	28.5%	13.2%
Canada	4.8%	-3.5%	-77.0%	91.6%	60.3%	25.9%	15.9%
Mexico	3.4%	-1.3%	-61.0%	50.1%	38.6%	23.4%	3.9%
Overseas	2.5%	1.3%	-82.2%	83.7%	75.0%	33.4%	17.0%
Global Long-Haul Travel	7.1%	4.3%	-72.2%	70.3%	50.0%	24.1%	13.5%
Total U.S. Domestic Person-Trips³	1.7%	1.8%	-31.0%	19.0%	19.3%	4.6%	3.4%
Business	1.2%	1.1%	-60.2%	23.8%	72.7%	9.6%	5.6%
Leisure	1.8%	1.9%	-23.7%	18.4%	12.0%	3.5%	2.9%
Auto	1.4%	1.5%	-25.9%	19.4%	16.6%	3.3%	2.0%
Air	4.9%	4.3%	-62.3%	15.7%	63.1%	25.4%	17.2%

US TRAVEL FORECAST - VOLUME

	2018	2019	2020	2021	2022	2023	2024
Total Travel Spending in the U.S. (\$ Billions)	1,088	1,127	617	847	966	1,043	1,100
U.S. Residents	931	972	582	785	871	924	968
Business	282	291	131	244	248	258	266
Leisure	649	681	450	541	624	666	702
International Visitors ¹	157	155	36	62	95	118	132
Total International Visitors to the U.S. (Millions)	79.7	79.3	19.0	33.0	52.5	67.4	76.3
Canada	21.5	20.7	4.8	9.1	14.6	18.4	21.3
Mexico	18.4	18.1	7.1	10.6	14.7	18.2	18.9
Overseas	39.9	40.4	7.2	13.2	23.1	30.8	36.1
Global Long-Haul Travel (Millions)	342.3	357.0	99.3	169.2	253.8	314.9	357.6
U.S. Share of global long-haul travel (%)²	11.7	11.3	7.2	7.8	9.1	9.8	10.1
Total U.S. Domestic Person-Trips³ (Millions)	2,278	2,318	1,600	1,905	2,272	2,376	2,455
Business	459	464	185	229	395	433	457
Leisure	1,819	1,854	1,415	1,676	1,876	1,942	1,998