

South Dakota

Longwoods
INTERNATIONAL

**South Dakota
2022
Advertising ROI
Research**

Background and Purpose

- South Dakota's 2022 advertising campaign was launched in key markets.
 - The campaign consisted of both traditional and digital/online media including:
 - Print
 - Radio
 - Broadcast/Cable TV
 - Digital (display, audio, videos)
 - Social media
 - Out-of-home
- Longwoods was engaged to conduct a program of research designed to:
 - Measure the ROI and advertising awareness of South Dakota's 2022 advertising campaign.
 - Through an analysis of South Dakota's image, provide input into the development of positioning and messaging for future campaigns.

Method

- A benchmark study was conducted after the conclusion of the advertising period to measure awareness of specific ads, estimate the impact of advertising awareness on image, and measure short-term conversion that occurred during and shortly after the campaign period.
 - A self-completion survey of 1,603 respondents in key markets, distributed as follows:
 - Minnesota 206
 - Wisconsin 215
 - Illinois 401
 - Missouri 226
 - Iowa 115
 - Colorado 210
 - Nebraska 80
 - North Dakota 50
 - Montana 50
 - Wyoming 50

Method (Cont'd)

- To qualify for the survey, respondents must have personally taken at least one day or overnight leisure trip in the past three years and intend to take at least one day or overnight leisure trip in the next two years.
- Respondents are members of a major online consumer research panel.
- Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
- Sample was drawn to be proportionate to population by specific states, age, and sex.
- During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey as not to bias earlier questions on attitudes towards South Dakota and other behavioral measures.
- The fieldwork was conducted in November 2022.
- Median length of survey was 22 minutes.

Method (Cont'd)

- Data were weighted on key demographic variables (geography, age, sex, household income, household size) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific markets.
- The estimates of the campaign's impacts on visits to South Dakota are conservative in that:
 - Trips taken/intended by people in the absence of advertising are backed out.
 - Conservative control procedures help ensure that only advertising-influenced trips are included.
- For a sample of this size, the confidence level is +/- 3%.



South Dakota

**Main Findings:
South Dakota's
Overall Position in
the Target Market**



South Dakota

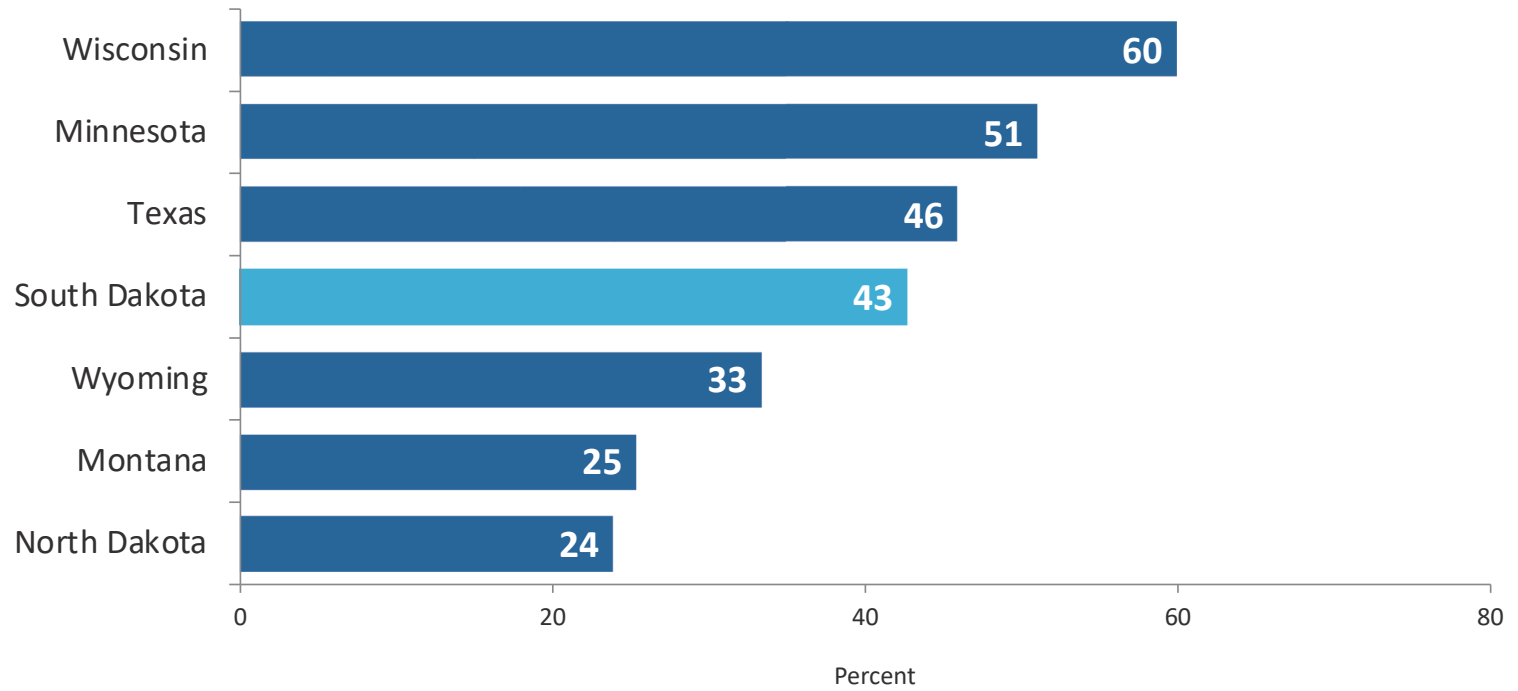
**Destination
Visitation
& Interest**

Destination Visitation & Intent

- Four in ten (43%) of travelers within South Dakota's regional advertising markets have visited South Dakota during their lifetimes, behind Wisconsin (60%), Minnesota (51%), and Texas (46%).
- Over one in ten (14%) have visited South Dakota during the past 2 years, in a virtual tie with Texas (15%), and behind Wisconsin (39%) and Minnesota (29%).
- A quarter (26%) intend to visit South Dakota during the next 12 months, in a virtual tie with Texas (27%) and Wyoming (25%), and behind Wisconsin (47%) and Minnesota (40%).

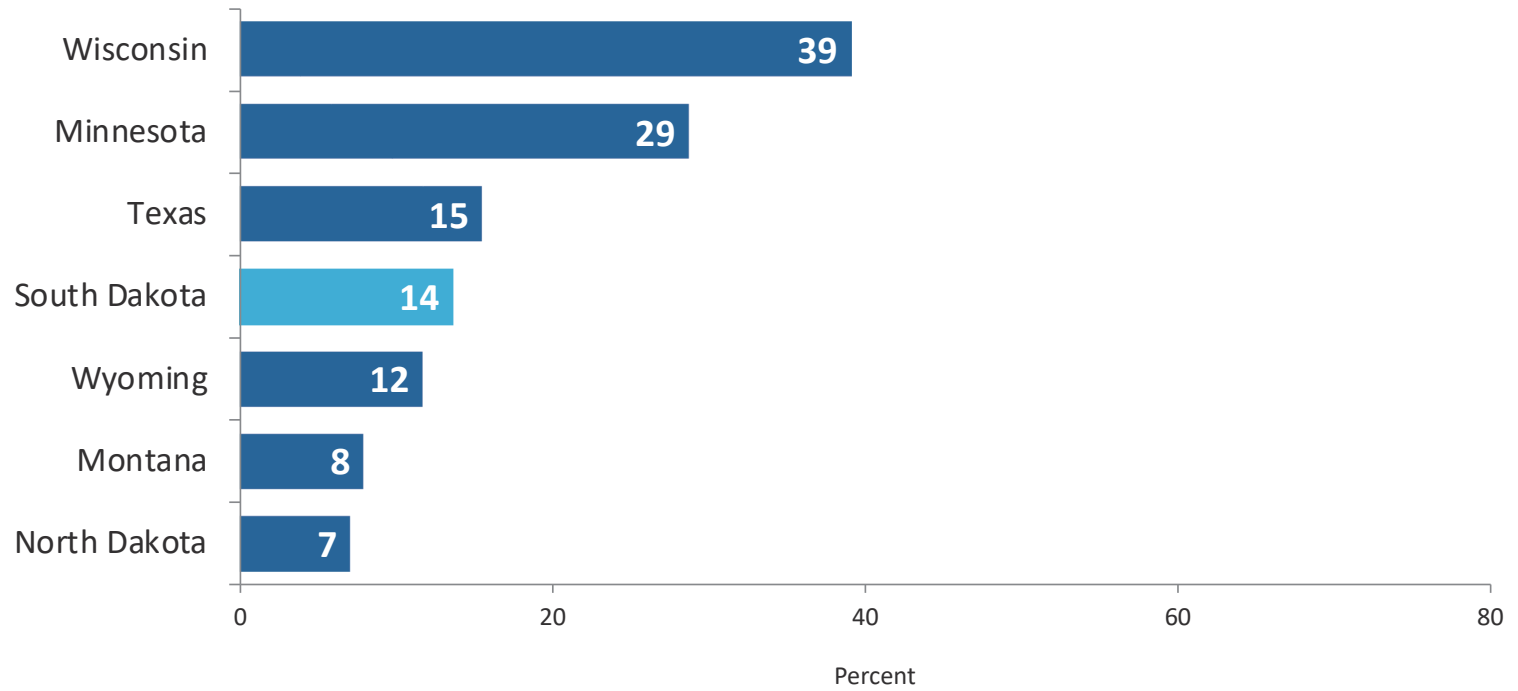
Destinations Ever Visited

Base: Residents of South Dakota's Regional Advertising Markets



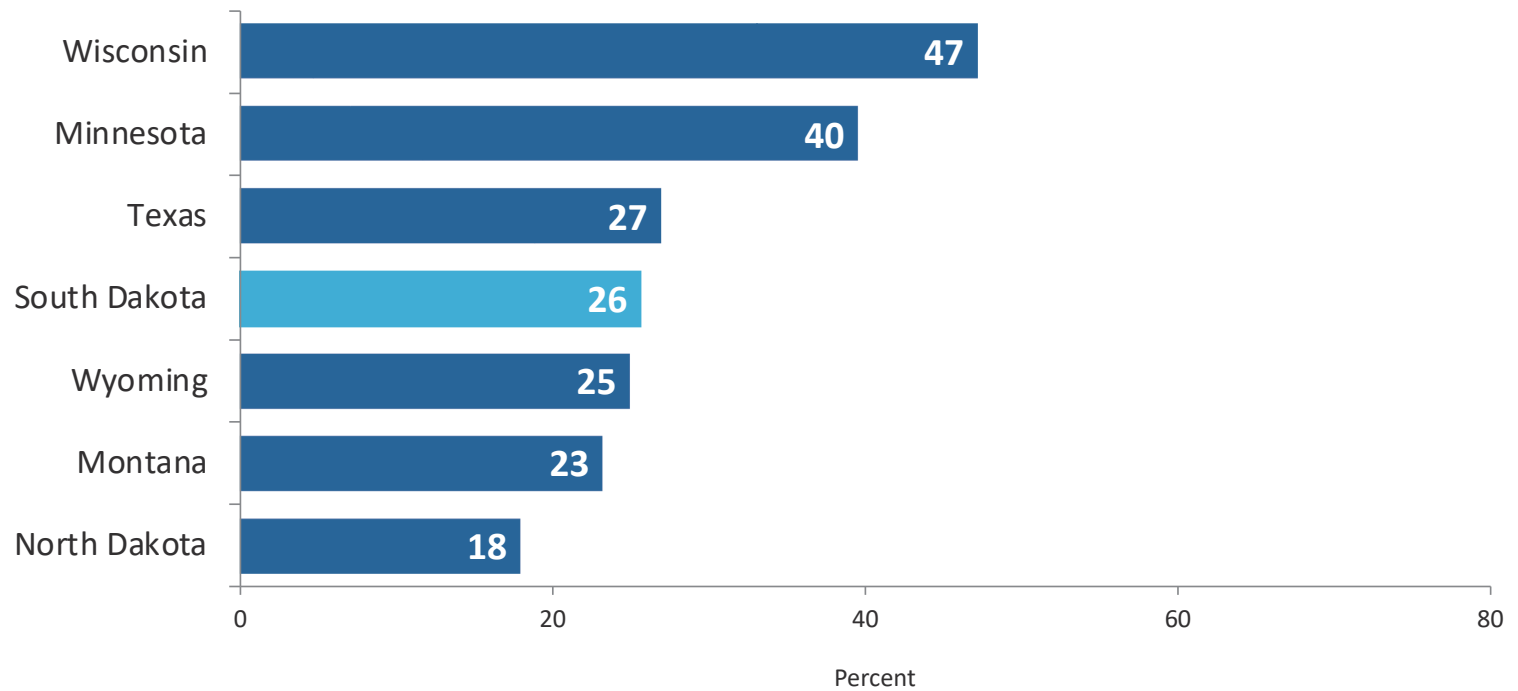
Destinations Visited in Past 2 Years

Base: Residents of South Dakota's Regional Advertising Markets



Destinations Intend to Visit in Next 12 Months

Base: Residents of South Dakota's Regional Advertising Markets





South Dakota

**Destination Hot
Buttons**

Travel Motivators

- Respondents evaluated the image of South Dakota and six other destinations on an overall basis and on a series of additional detailed image attributes.
- To determine hot buttons for getting on the “wish list”, we measured the degree of association between the destinations’ overall image and their ratings on individual attributes:
 - For this purpose, we used the main overall measure included in the image battery – “A place I would really enjoy visiting” – as the predictor variable.
- Then, in order to better communicate the results, the data were grouped into broader categories or factors.
- For a destination in the South Dakota target markets to get on travelers’ consideration list, it must, first and foremost, be perceived to:
 - Be **exciting** – being seen as exciting, fun, and having a real sense of adventure.
 - Be good for **adults**.
 - **Unique**.

Travel Motivators (Cont'd)

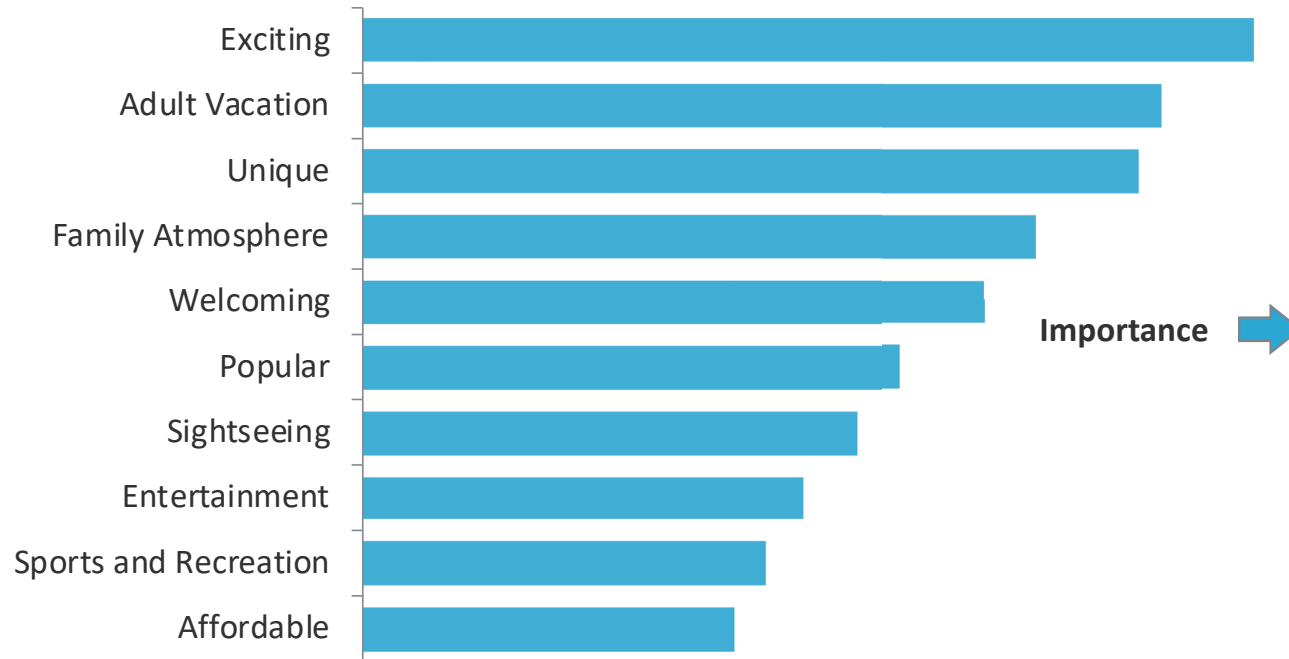
- There are several factors that individually are of moderate importance, but that in combination define the excitement and suitability for adults that attracts vacationers to a destination:
 - A great **family atmosphere** – a place children would enjoy and good for families.
 - A relaxing, **welcoming** environment.
 - **Popularity**, i.e., is the place popular among vacationers? Is it well-known? Do you often see advertising of the destination?
 - Great **sightseeing**, including lots to see and do, beautiful scenery, landmarks, parks, historical sites, etc.

Travel Motivators (Cont'd)

- Lower priorities are:
 - The opportunities for **entertainment**, e.g., great music, interesting food and drink options, and exciting casinos.
 - **Sports and recreation**, including camping, hiking, cycling, and fishing.
- **Affordability** is relatively unimportant at the wish list stage:
 - But it tends to rise to the top of the list the closer one gets to closing the sale, as travel distance and pocketbook issues come into play.
 - Affordability includes both the cost of getting there/distance to market and costs once you have arrived, such as food and lodging.
- The Hot Buttons, or ten Image attributes most closely tied to destination selection in South Dakota's target markets, are: a fun place for vacation; must-see destination; an exciting place; lots to see and do; good for an adult vacation; vacationing there is a real adventure; unique vacation experience; popular with vacationers; children would enjoy; and good place to relax.

Travel Motivators

Base: Residents of South Dakota's Regional Advertising Markets



*A measure of the degree of association between each factor and whether destination is a place "I'd really enjoy visiting."

Top 10 Hot Buttons

Base: Residents of South Dakota's Regional Advertising Markets

Hot Buttons

A fun place for vacation

Must-see destination

An exciting place

Lots to see and do

Good for an adult vacation

Vacationing there is a real adventure

Unique vacation experience

Popular with vacationers

Children would enjoy

Good place to relax

South Dakota

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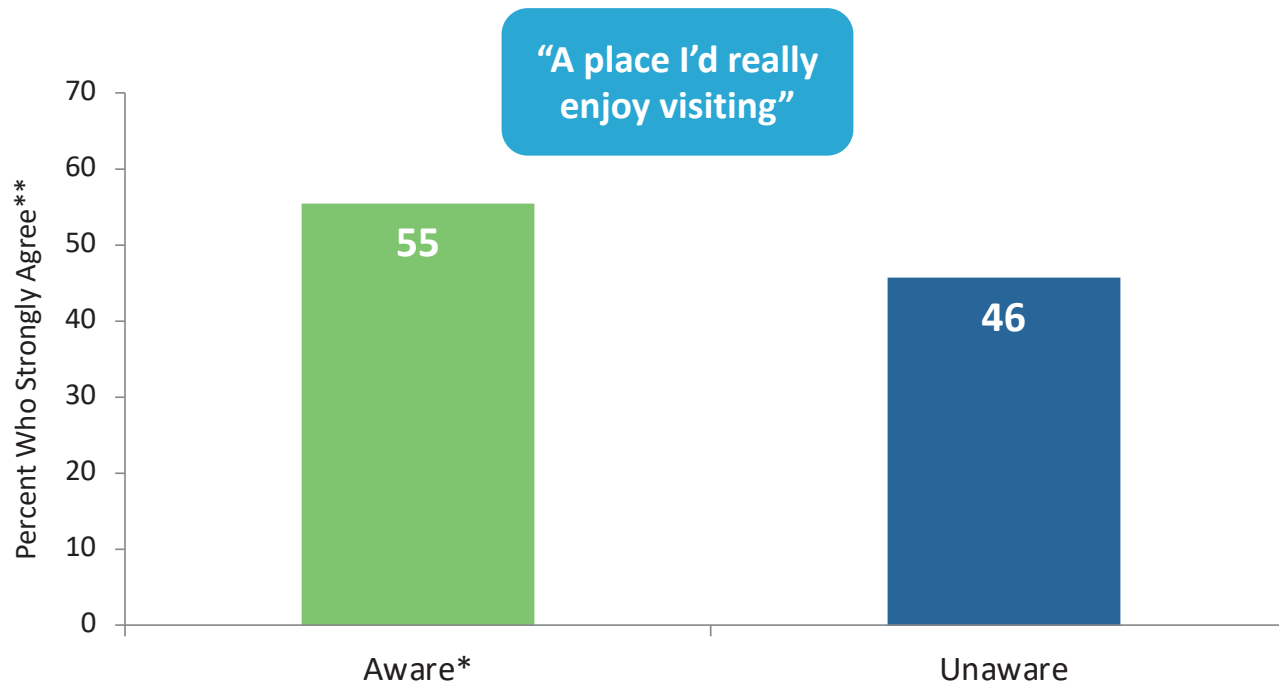
**Advertising
Impact on
South Dakota's
Image**

Advertising Impacts

- This campaign had a positive impact on travelers' perceptions of South Dakota.
- People exposed to the campaign gave South Dakota higher rating scores than those unfamiliar with the campaign for the general overall statement "South Dakota is a place I would really enjoy visiting."
- For the more detailed attributes, we find that the campaign did a good job of improving people's perceptions of South Dakota for the majority of image dimensions evaluated, including all ten Hot Button attributes:
 - An exciting place
 - Must-see destination
 - A fun place for vacation
 - Popular with vacationers
 - Vacationing there is a real adventure
 - Good for adult vacation
 - Lots to see and do
 - Children would enjoy
 - Unique vacation experience
 - Good place to relax

Advertising Impact on South Dakota's Overall Image

Base: Residents of South Dakota's Regional Advertising Markets



*Saw at least one ad

**"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10

Advertising Impact on South Dakota's Image

Base: Residents of South Dakota's Regional Advertising Markets

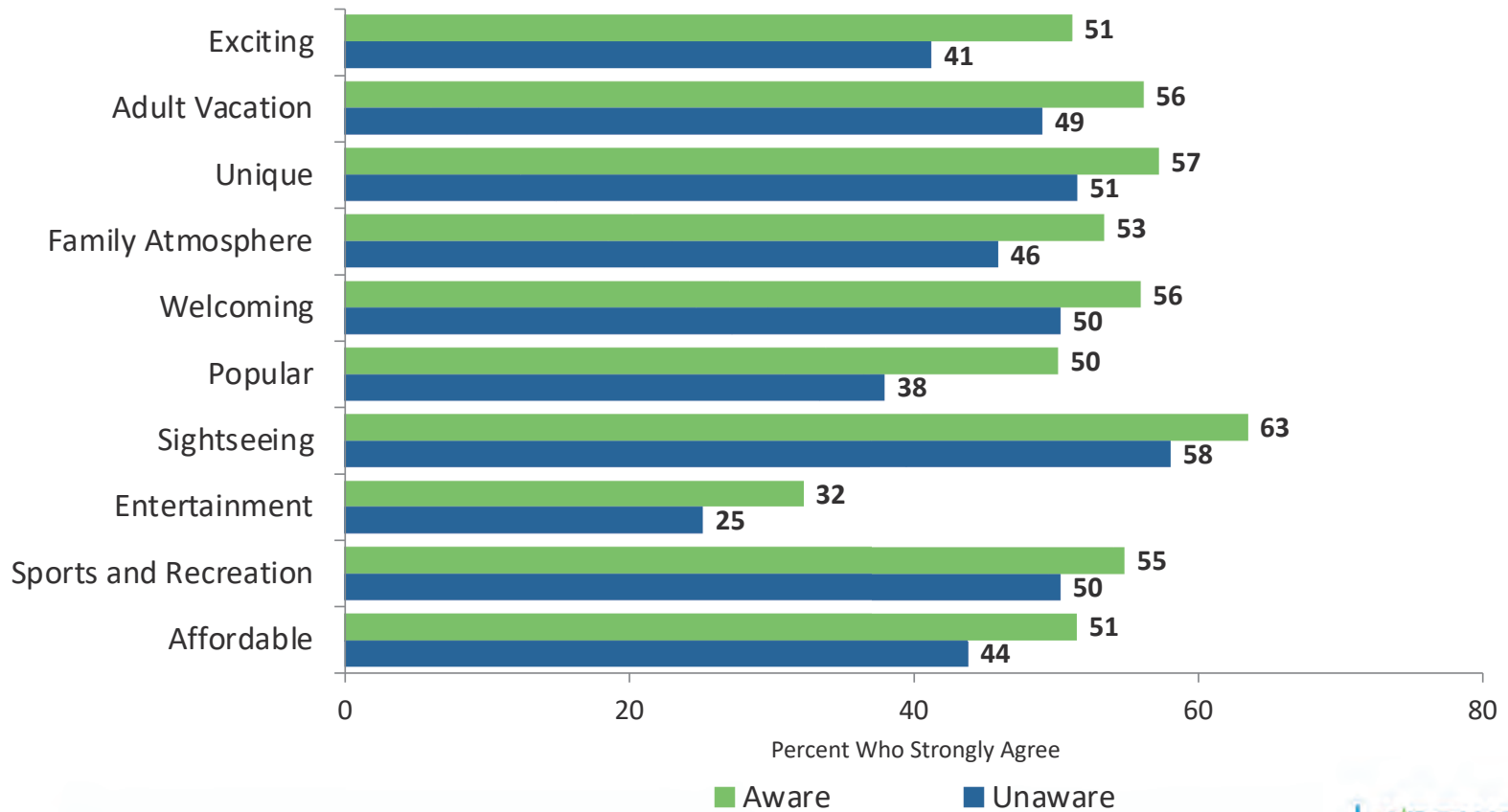


Image Attributes Most Impacted by Advertising

Base: Residents of South Dakota's Regional Advertising Markets

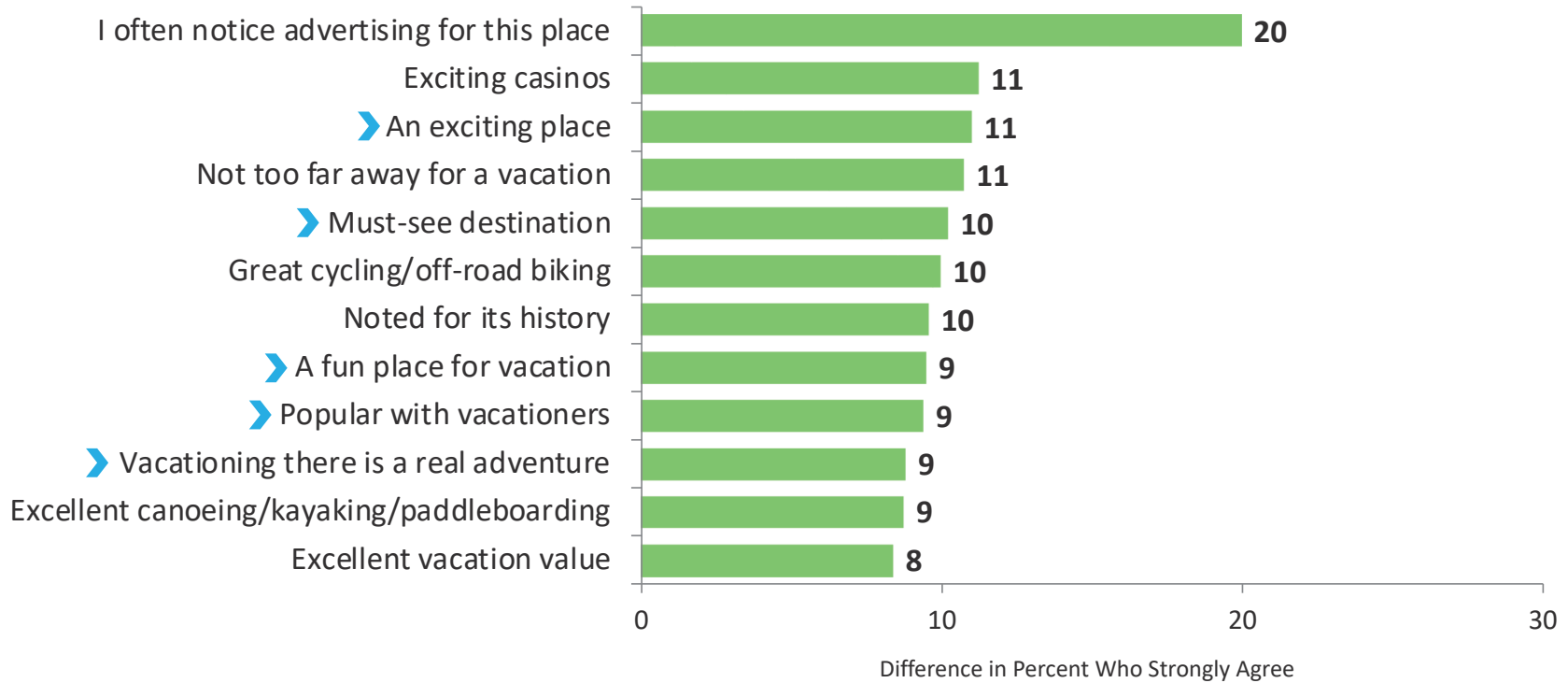
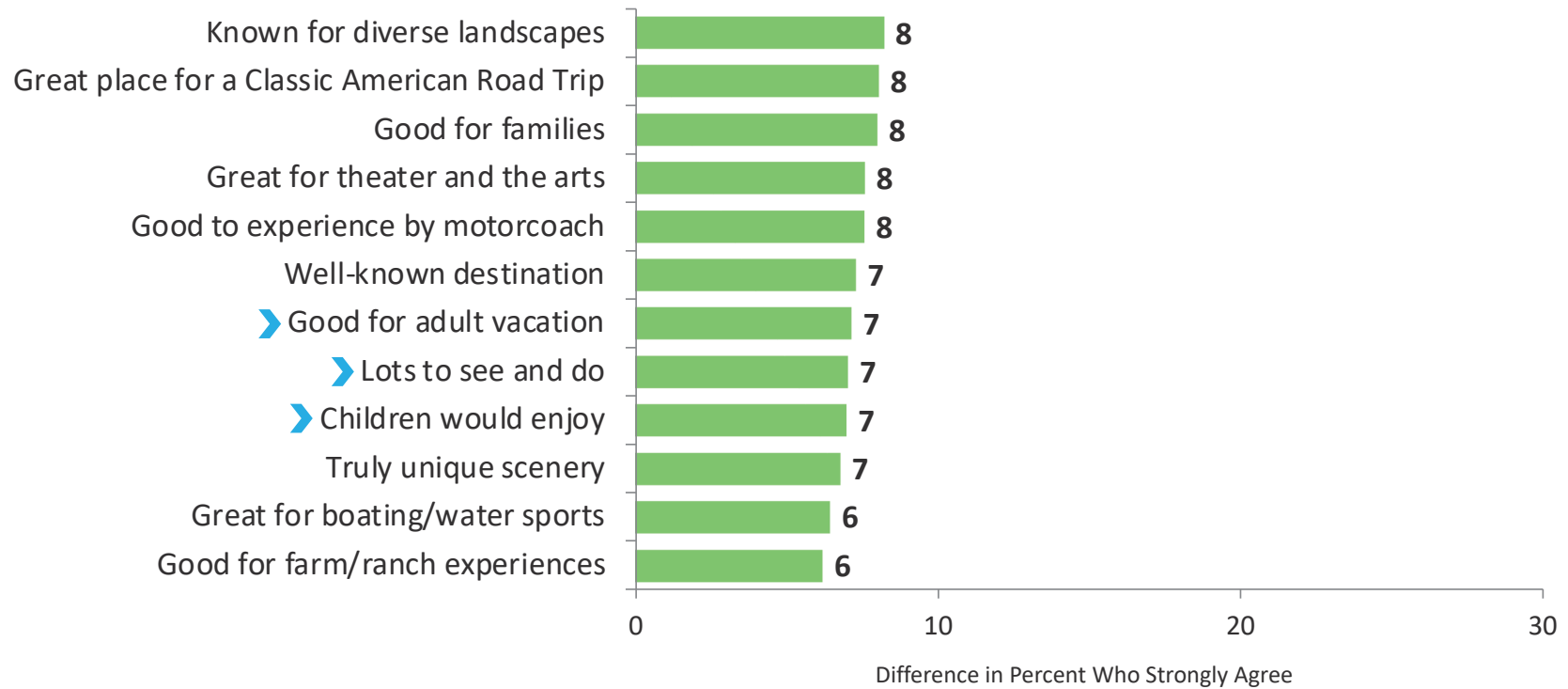


Image Attributes Most Impacted by Advertising (Cont'd)

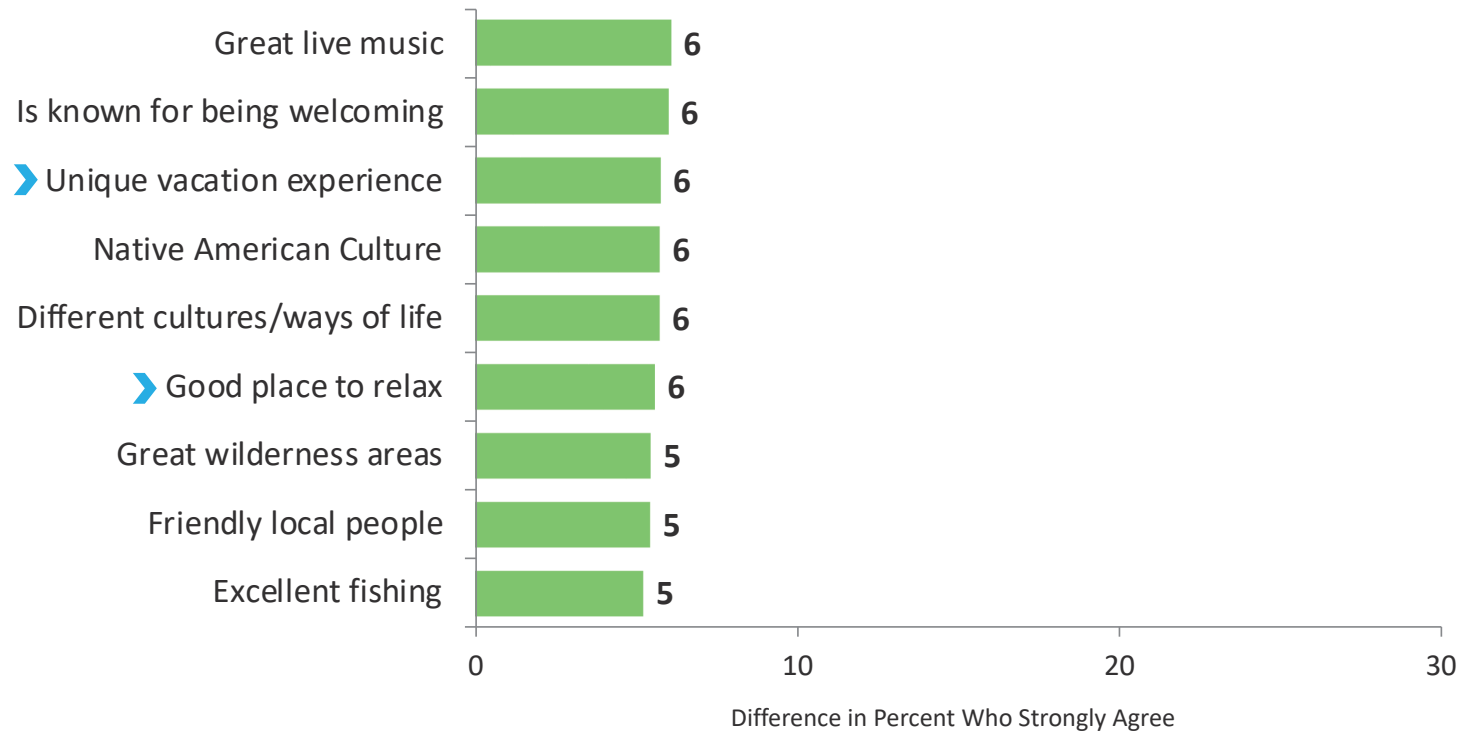
Base: Residents of South Dakota's Regional Advertising Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets





South Dakota

**South Dakota's
Image vs. the
Competition**

South Dakota's Image

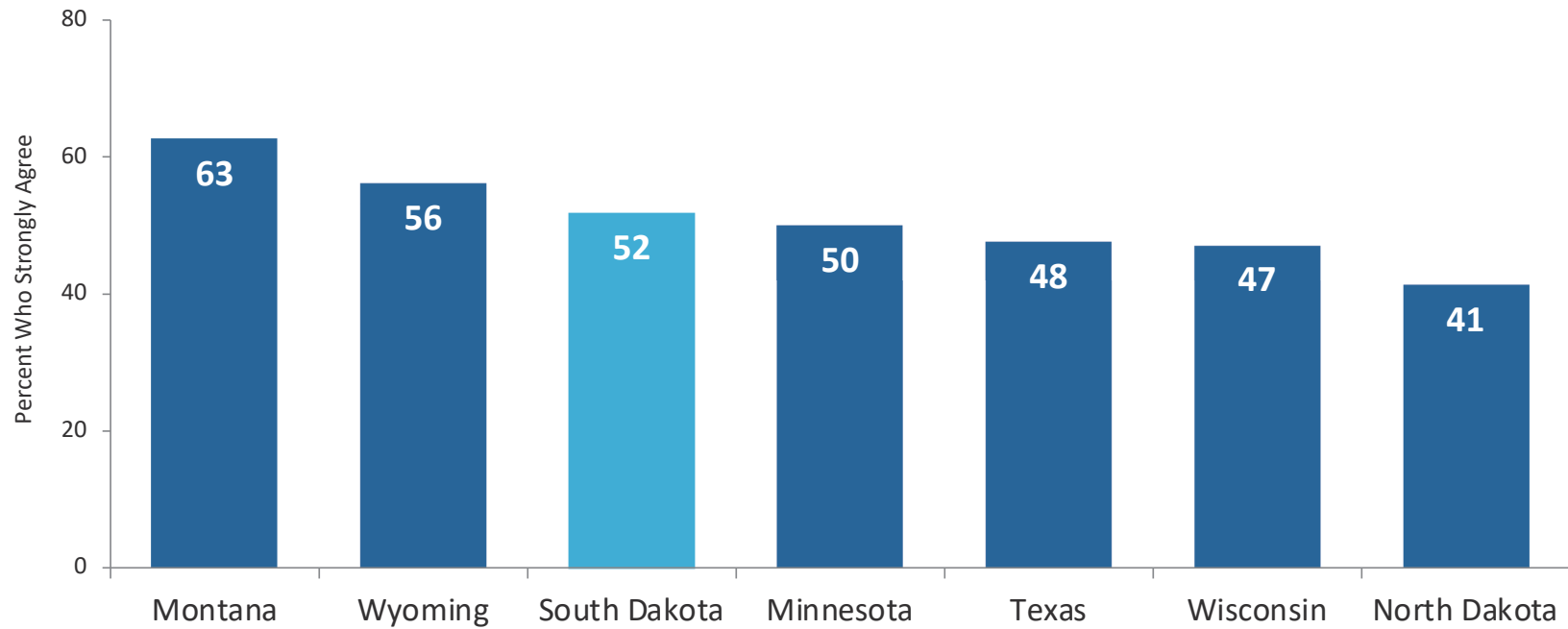
- Relative to the other destinations in the competitive set for this study, South Dakota has a positive overall image among travelers. Across the markets surveyed, half (52%) rated the state very favorably as a destination they “would really enjoy visiting.”
 - Virtually tied with Minnesota, behind Montana and Wyoming, and ahead of Texas, Wisconsin, and North Dakota.
- When comparing South Dakota's image versus the image of the combined competition, South Dakota's top image strengths are related to:
 - Well-known landmarks
 - Native American Culture
 - Authentic historical sites
 - Excellent national/state parks
 - Noted for its history

South Dakota's Image (Cont'd)

- South Dakota had six significant perceived image weaknesses versus the competitive set:
 - Great for boating/water sports
 - Great live music
 - Interesting food and drink options
 - Excellent canoeing/kayaking/paddleboarding
 - Great for theater and the arts
 - Excellent fishing

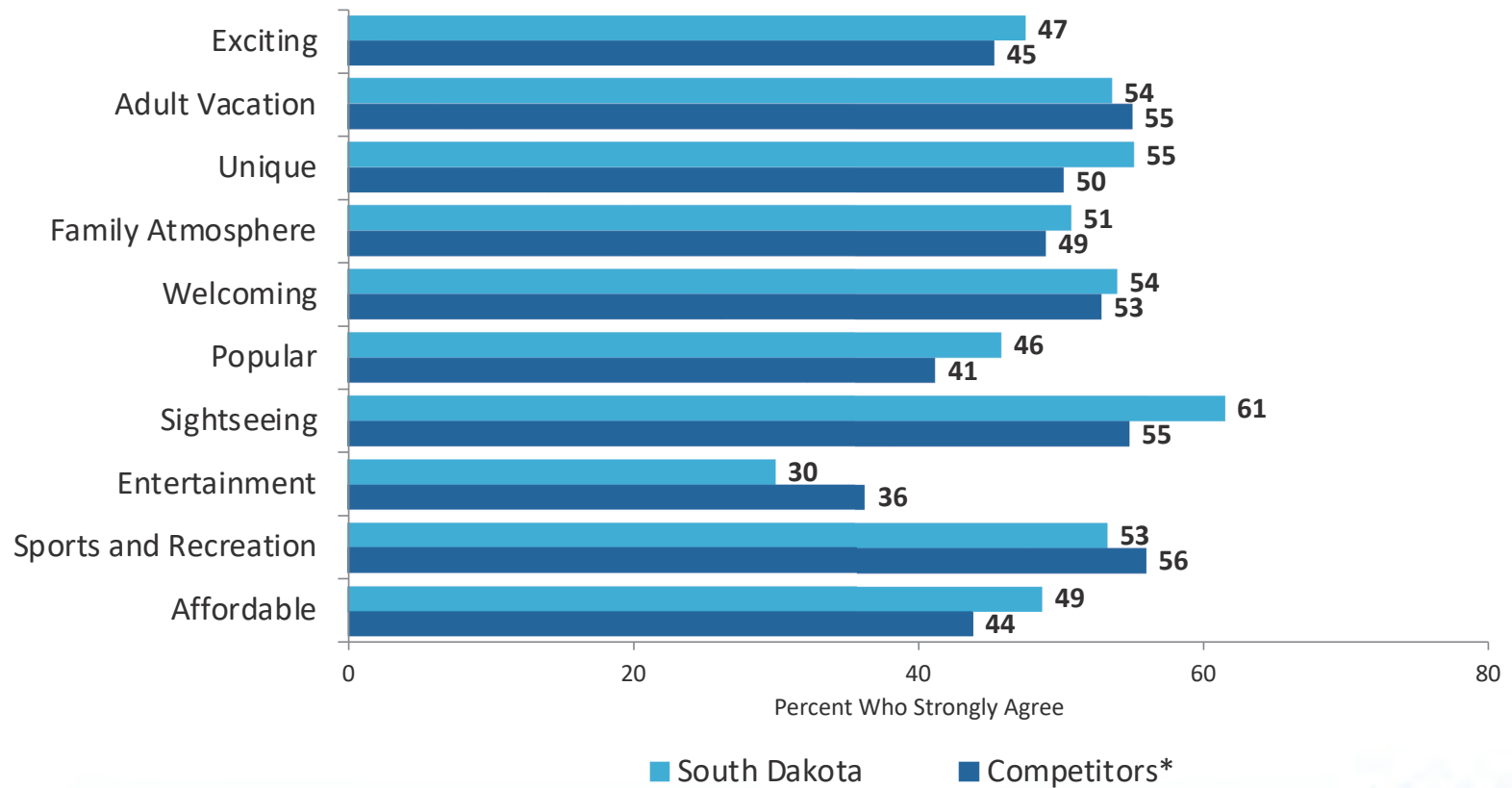
South Dakota's Overall Image vs. Competition — “A Place I'd Really Enjoy Visiting”

Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Overall Image vs. Competition

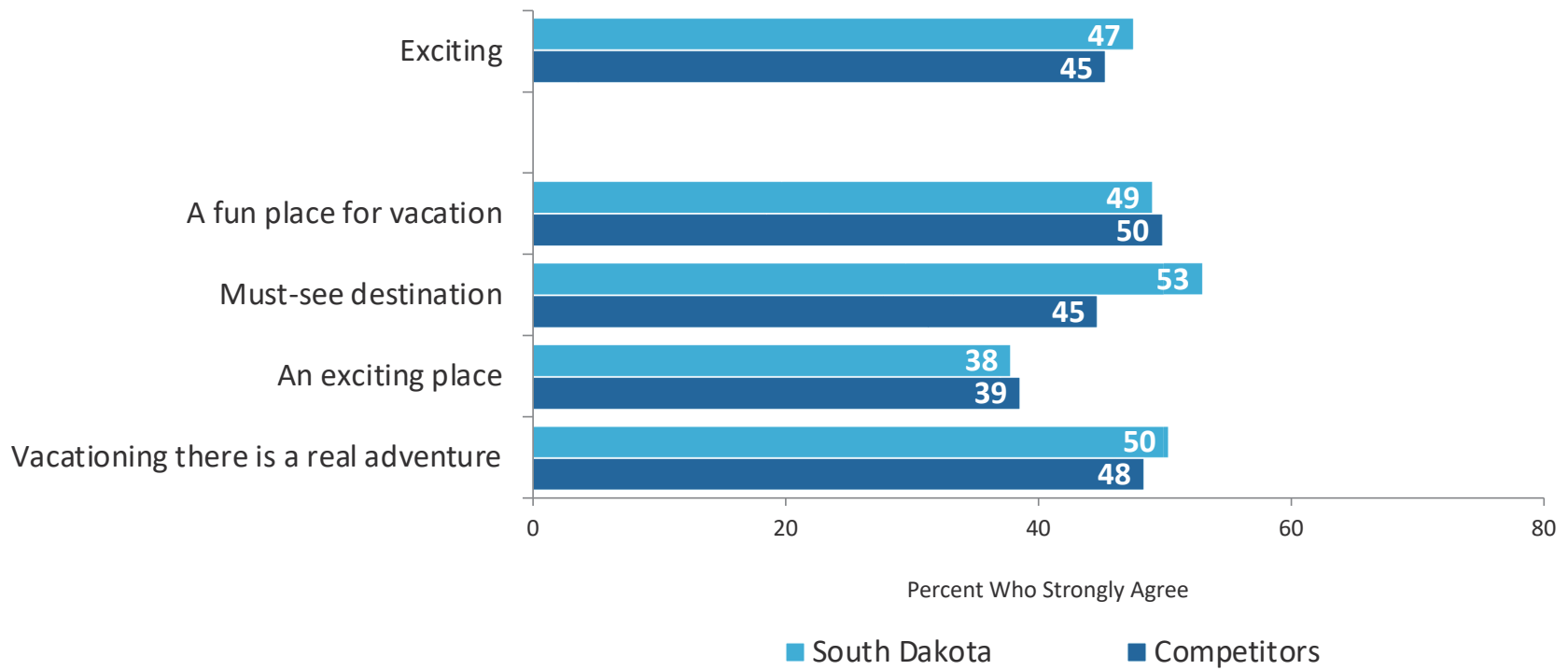
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competition

— Exciting

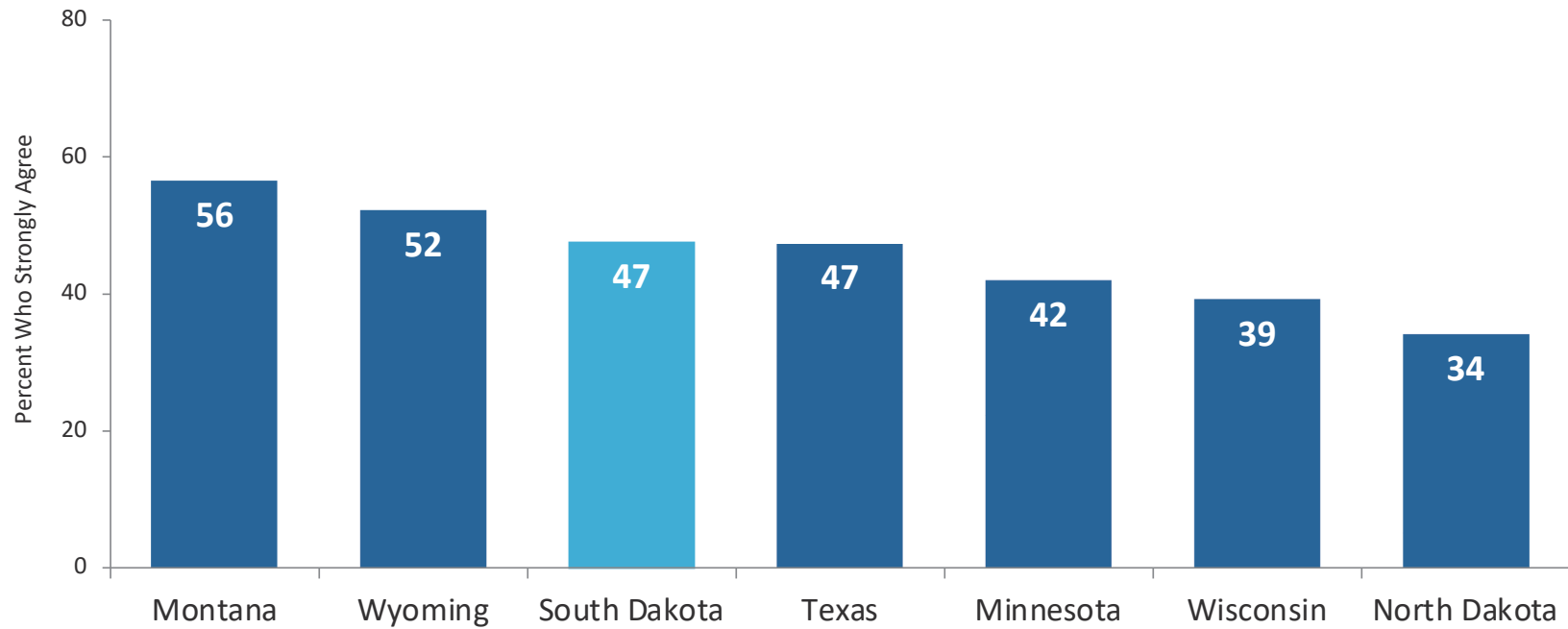
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competition

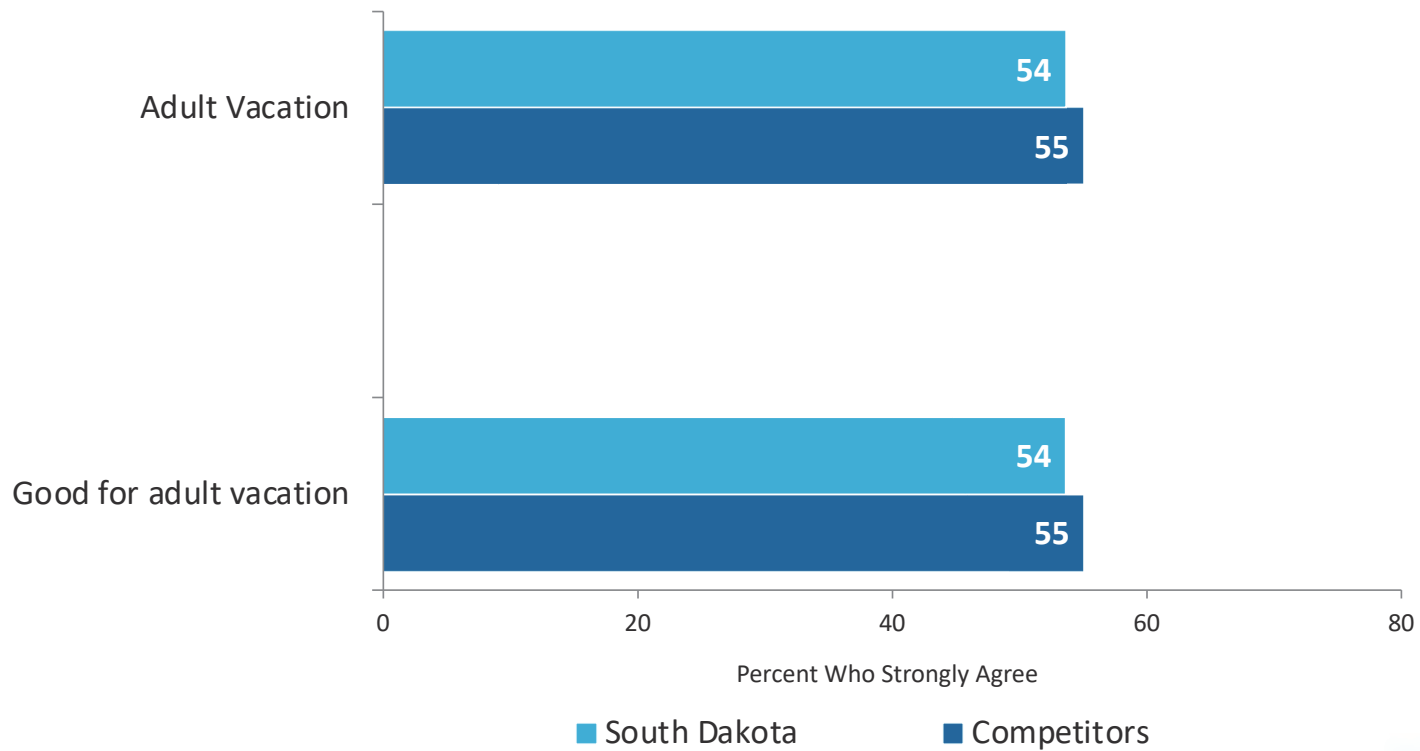
— Exciting

Base: Residents of South Dakota's Regional Advertising Markets



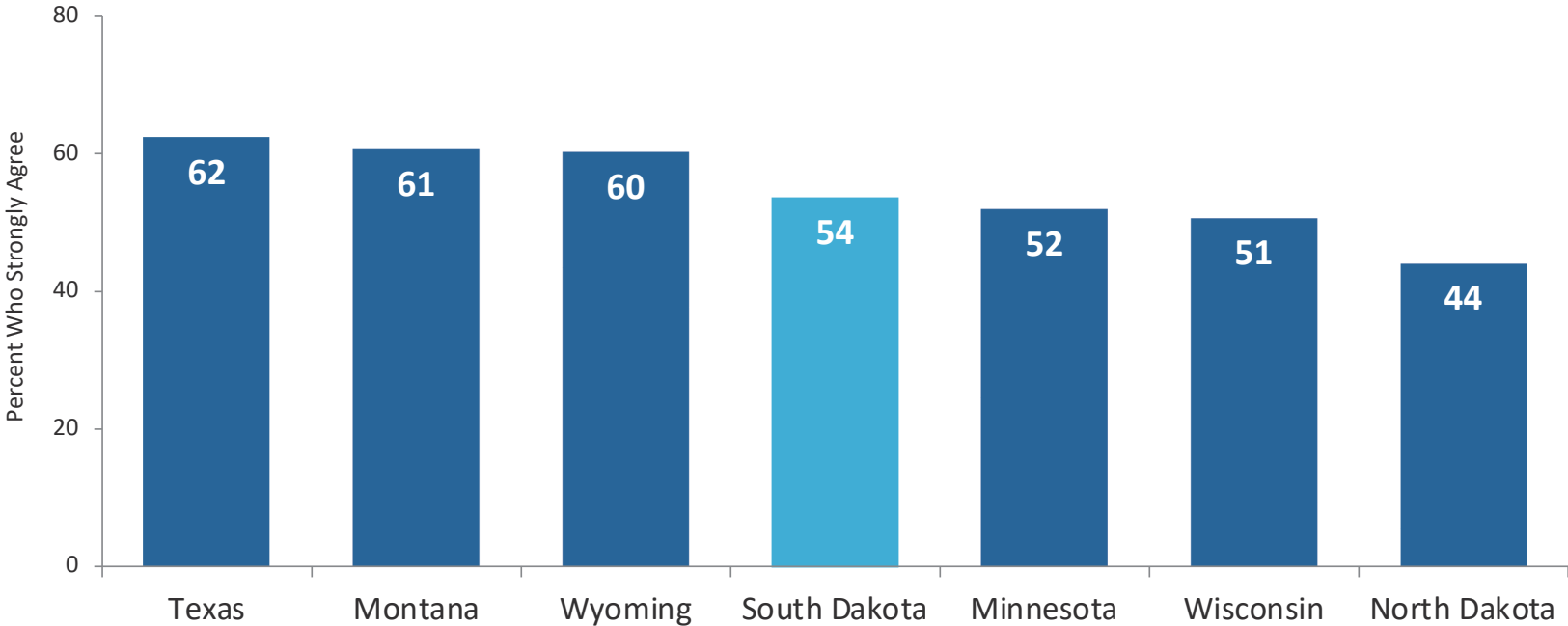
South Dakota's Image vs. Competition — Adult Vacation

Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competition — Adult Vacation

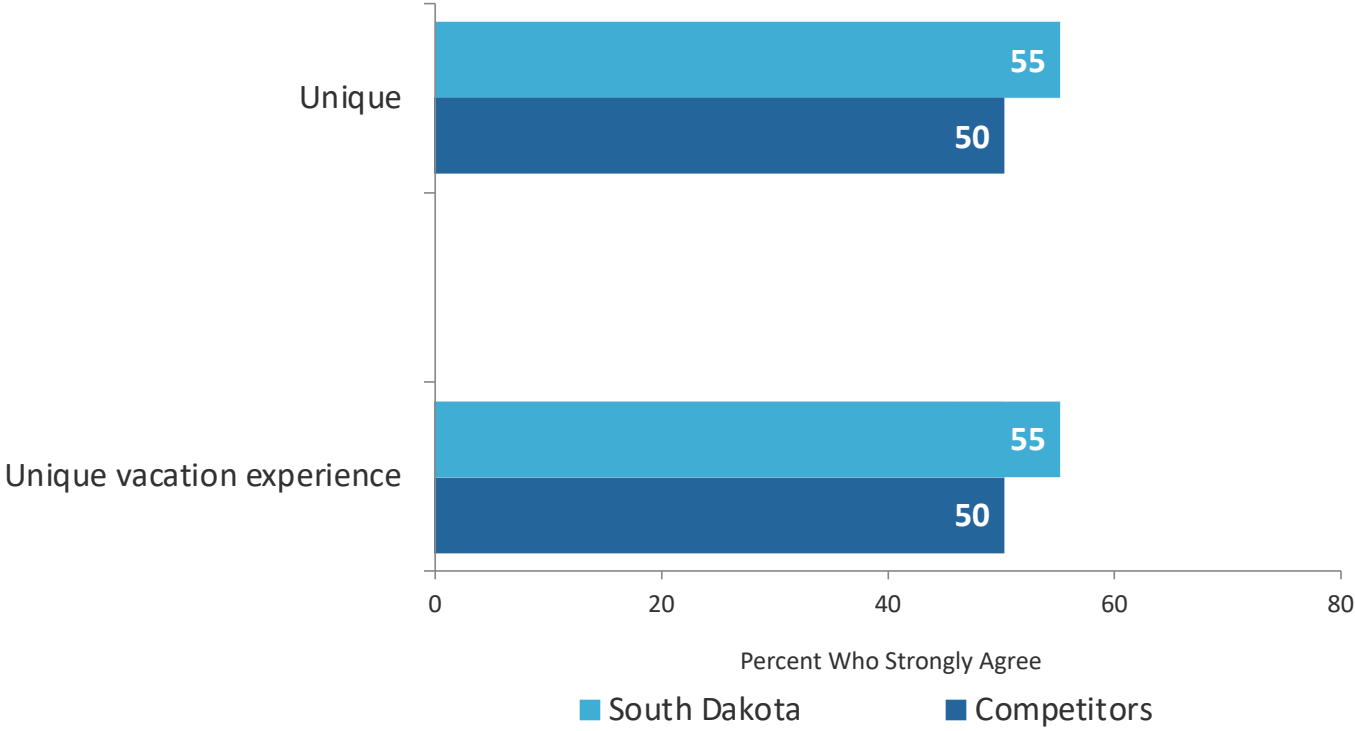
Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image vs. Competition

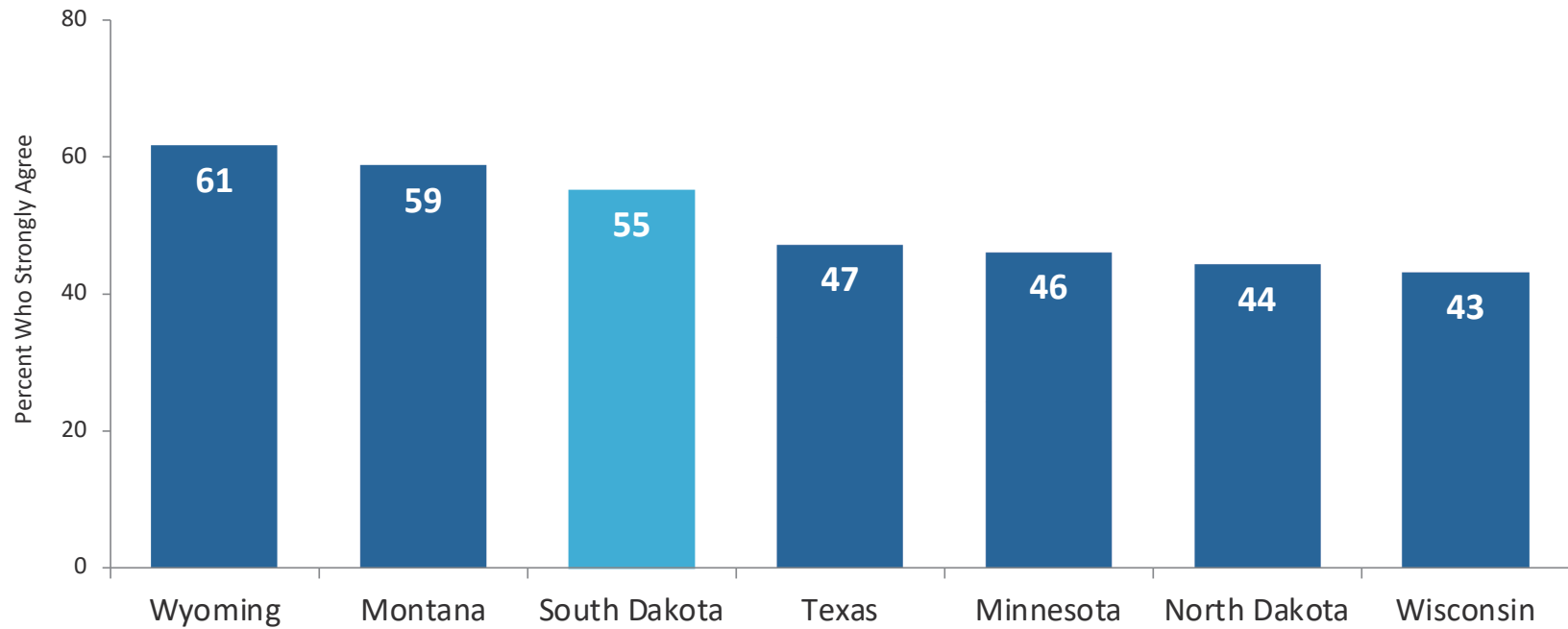
— Unique

Base: Residents of South Dakota's Regional Advertising Markets



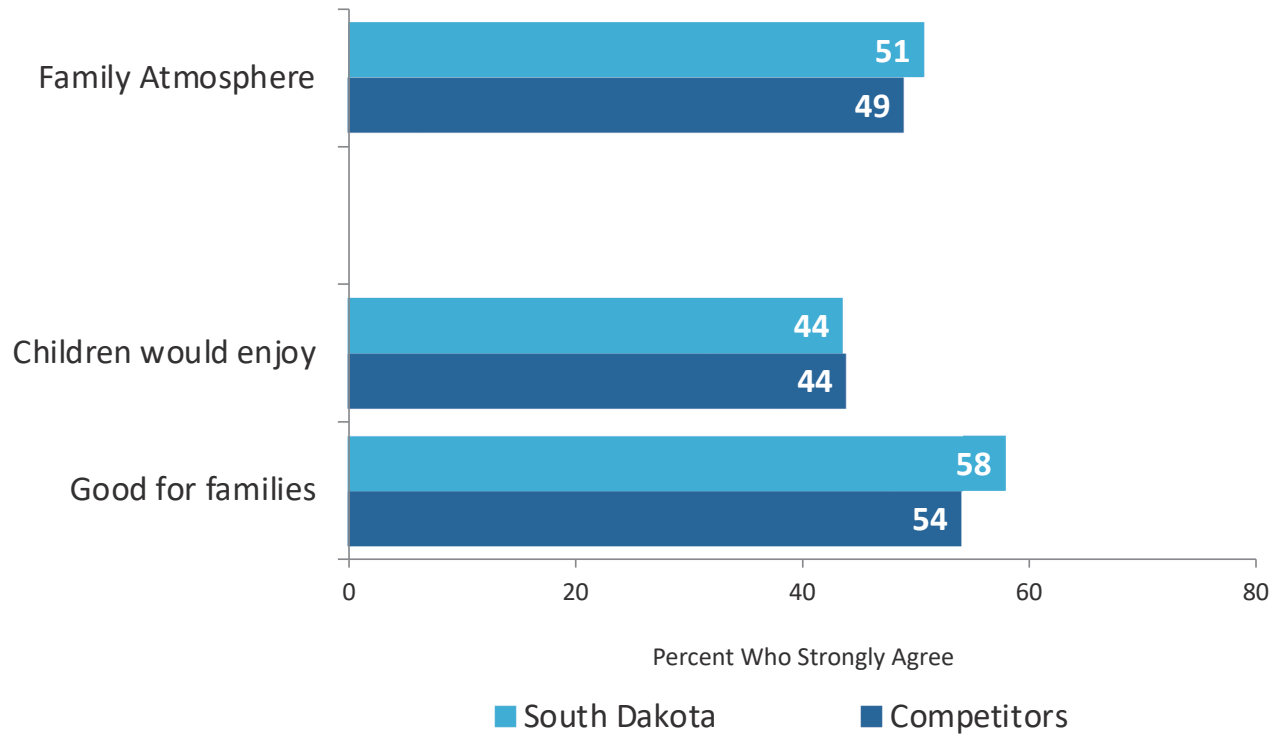
South Dakota's Image vs. Competition — Unique

Base: Residents of South Dakota's Regional Advertising Markets



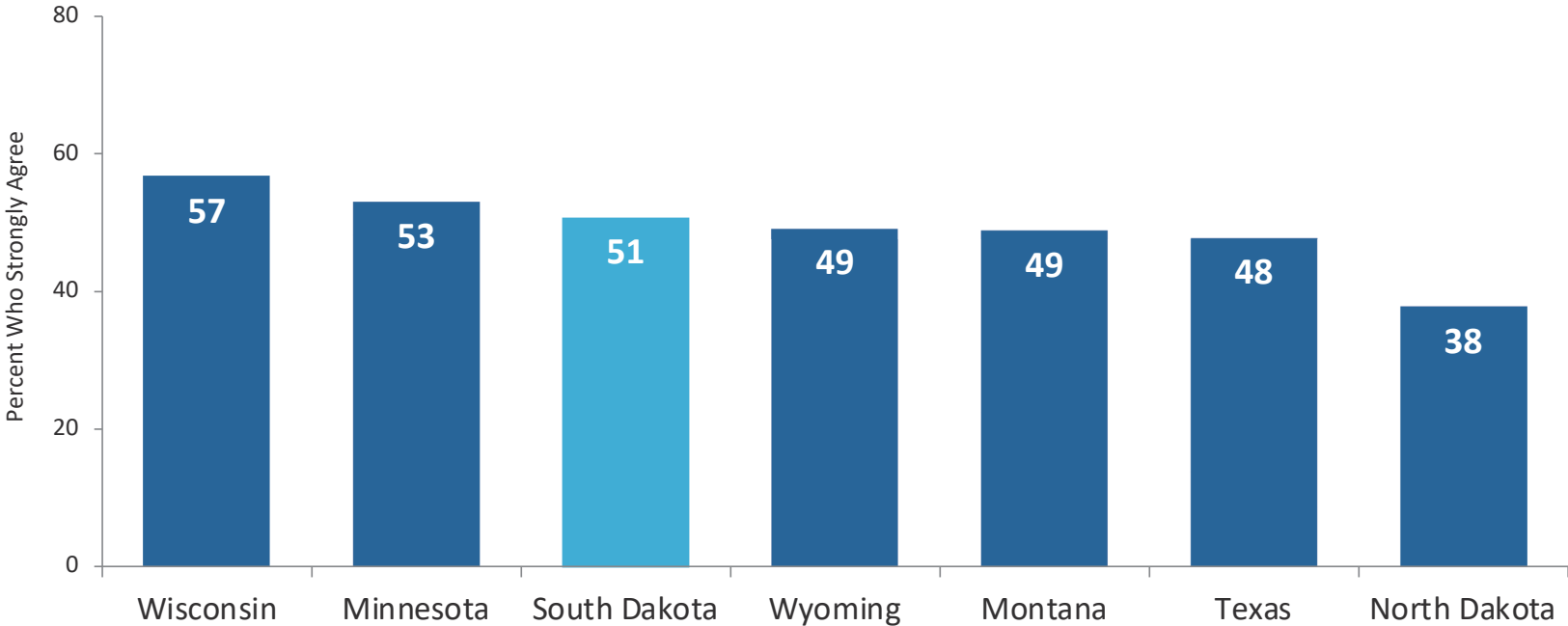
South Dakota's Image vs. Competition — Family Atmosphere

Base: Residents of South Dakota's Regional Advertising Markets



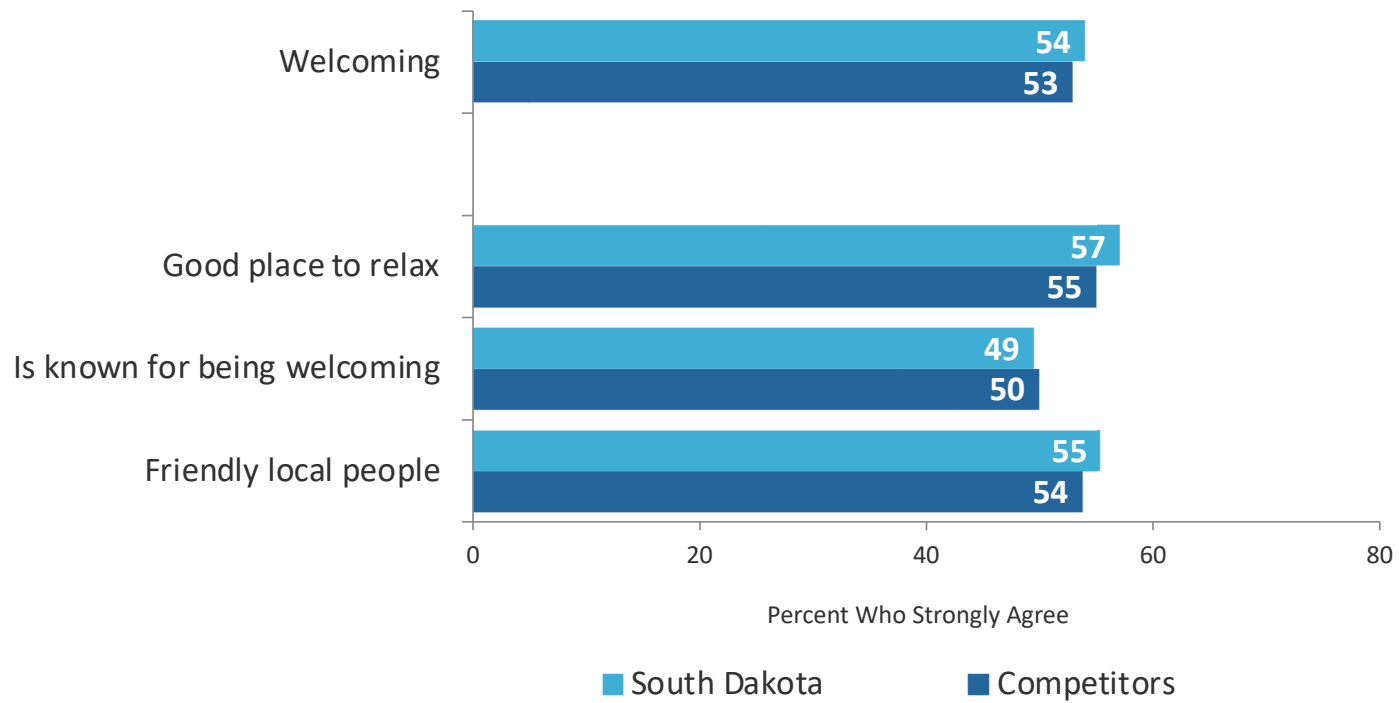
South Dakota's Image vs. Competition — Family Atmosphere

Base: Residents of South Dakota's Regional Advertising Markets



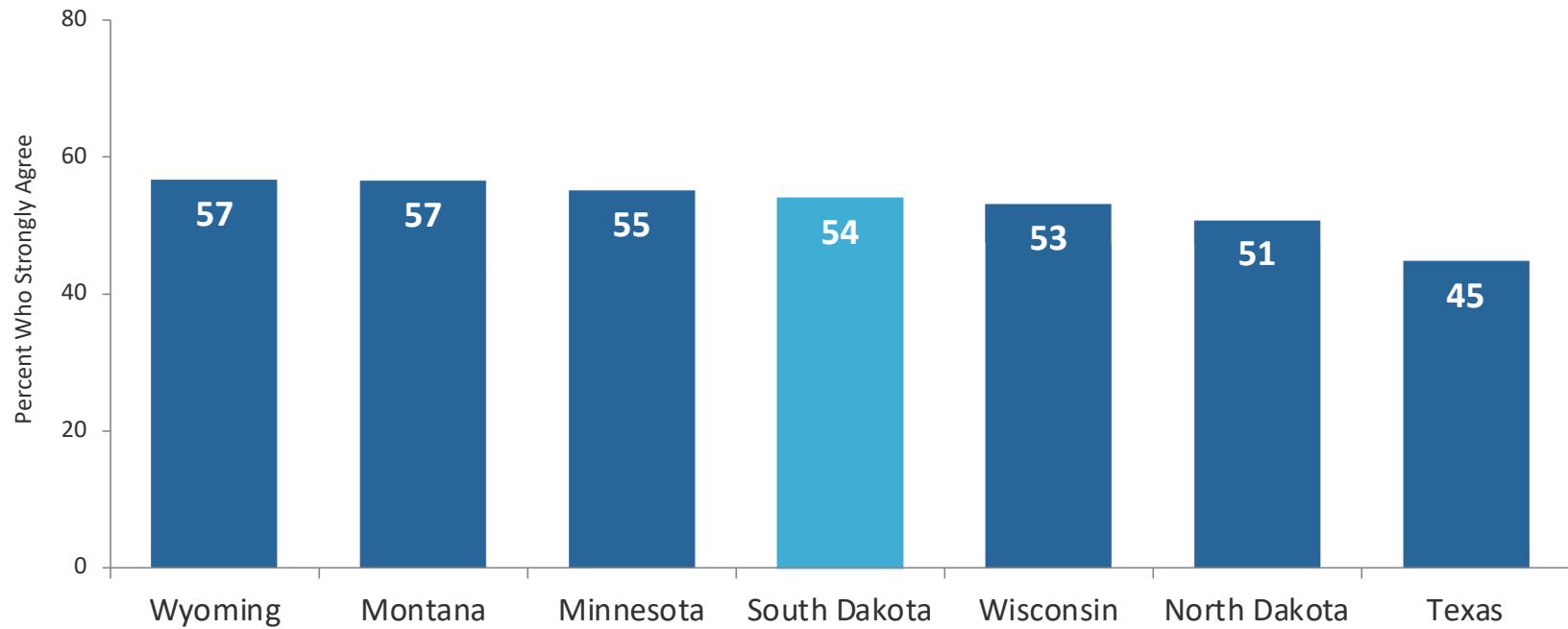
South Dakota's Image vs. Competition — Welcoming

Base: Residents of South Dakota's Regional Advertising Markets



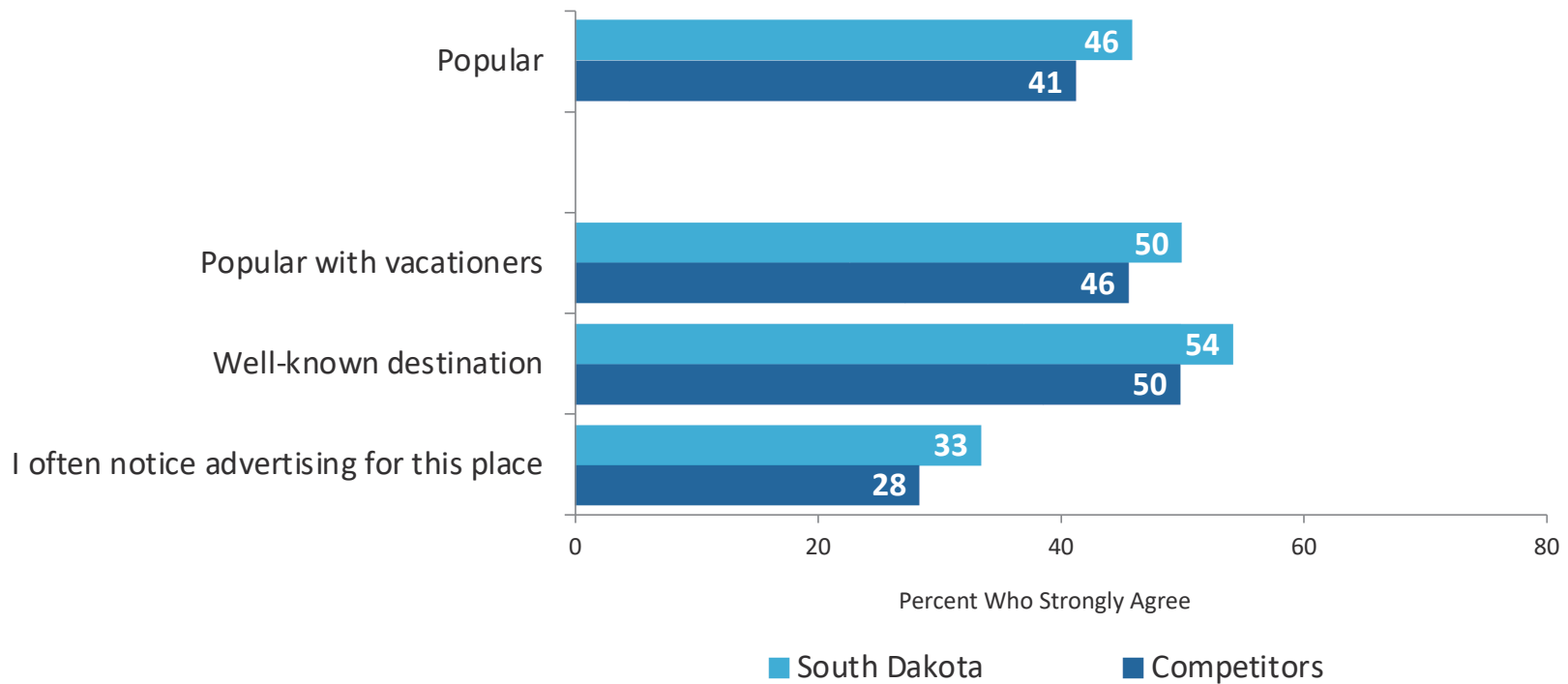
South Dakota's Image vs. Competition — Welcoming

Base: Residents of South Dakota's Regional Advertising Markets



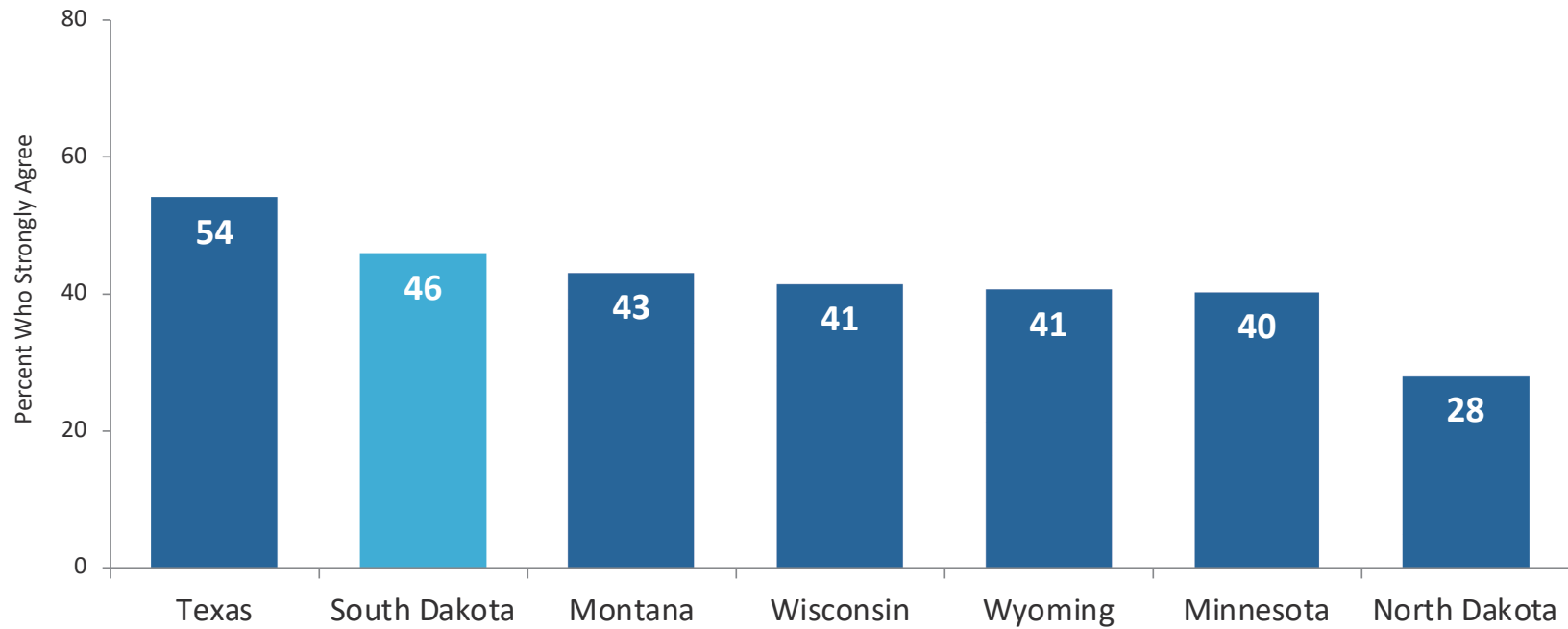
South Dakota's Image vs. Competition — Popular

Base: Residents of South Dakota's Regional Advertising Markets



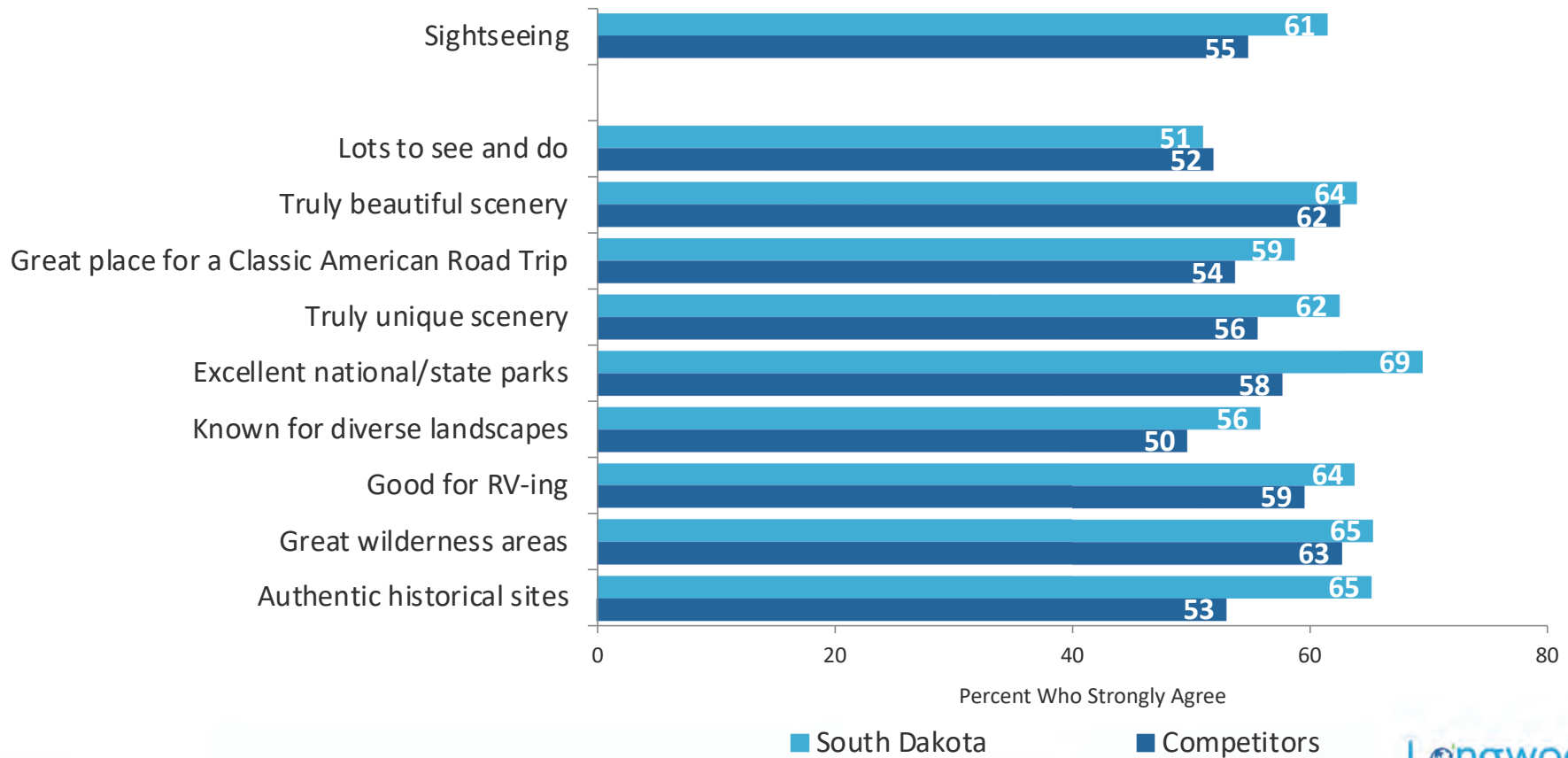
South Dakota's Image vs. Competition — Popular

Base: Residents of South Dakota's Regional Advertising Markets



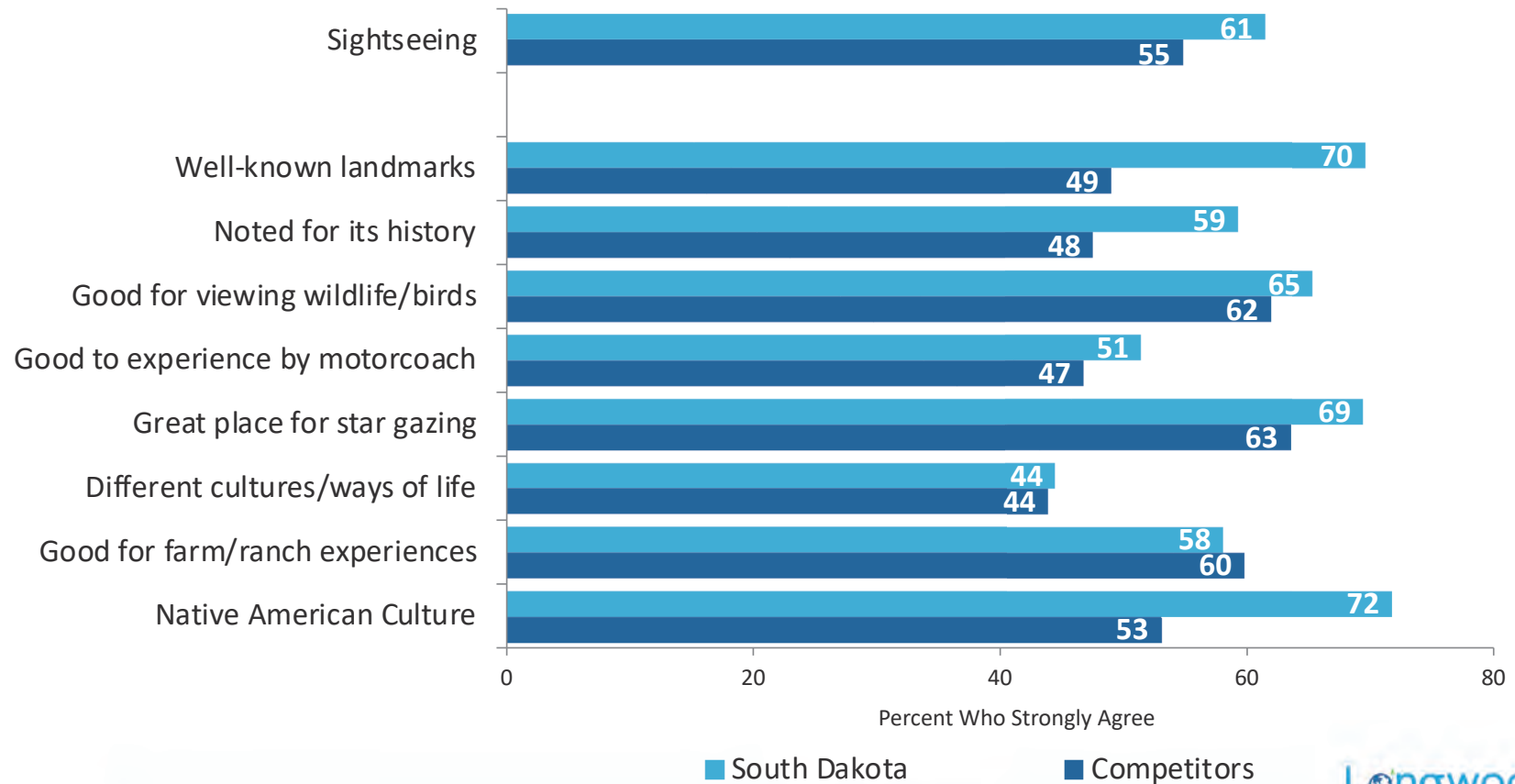
South Dakota's Image vs. Competition — Sightseeing

Base: Residents of South Dakota's Regional Advertising Markets



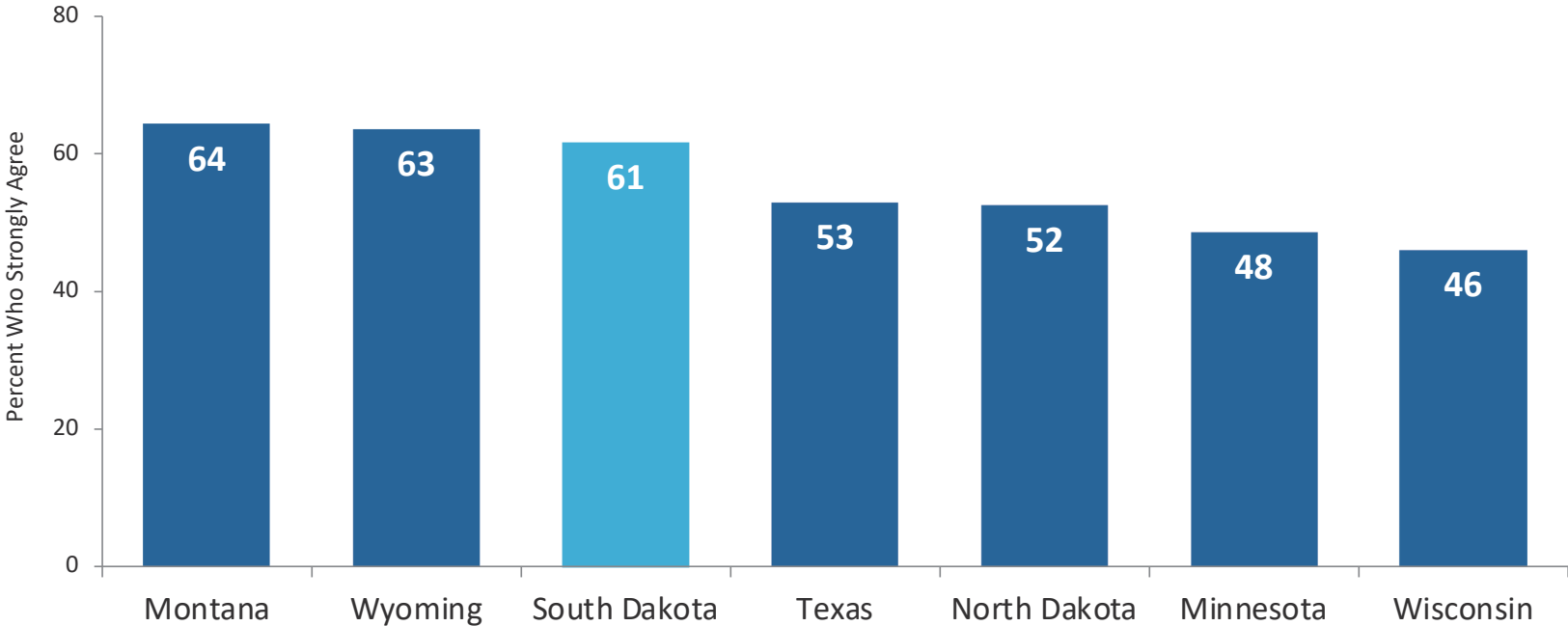
South Dakota's Image vs. Competition — Sightseeing (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



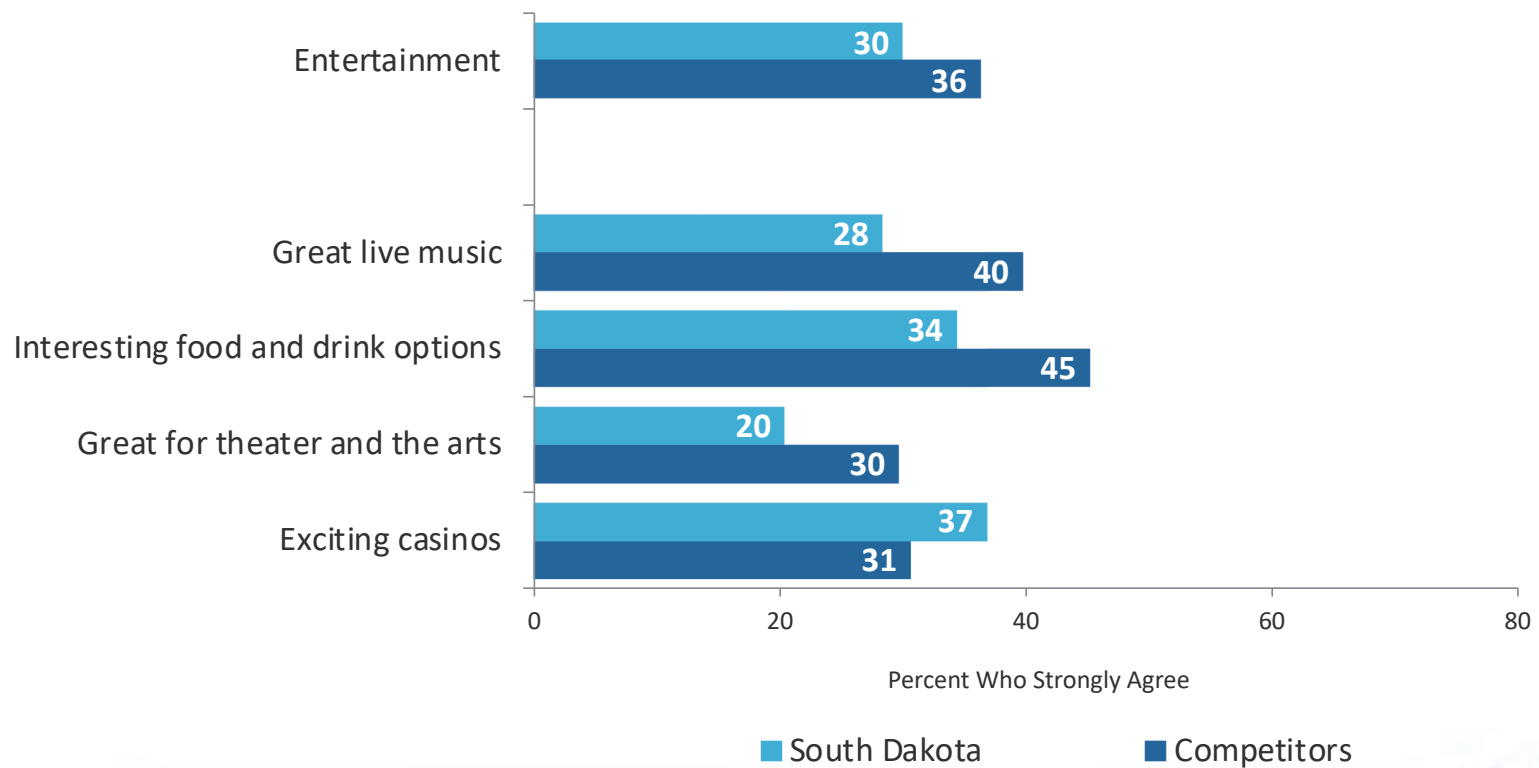
South Dakota's Image vs. Competition — Sightseeing

Base: Residents of South Dakota's Regional Advertising Markets



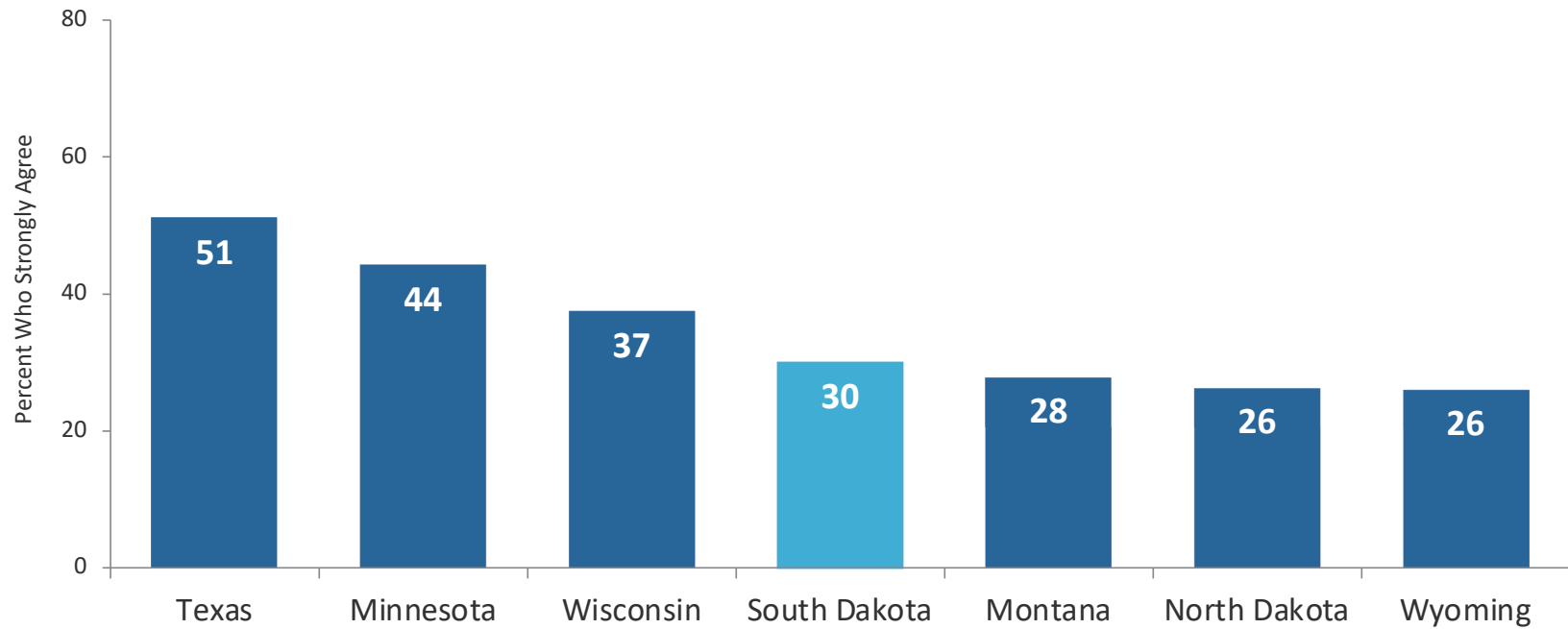
South Dakota's Image vs. Competition — Entertainment

Base: Residents of South Dakota's Regional Advertising Markets



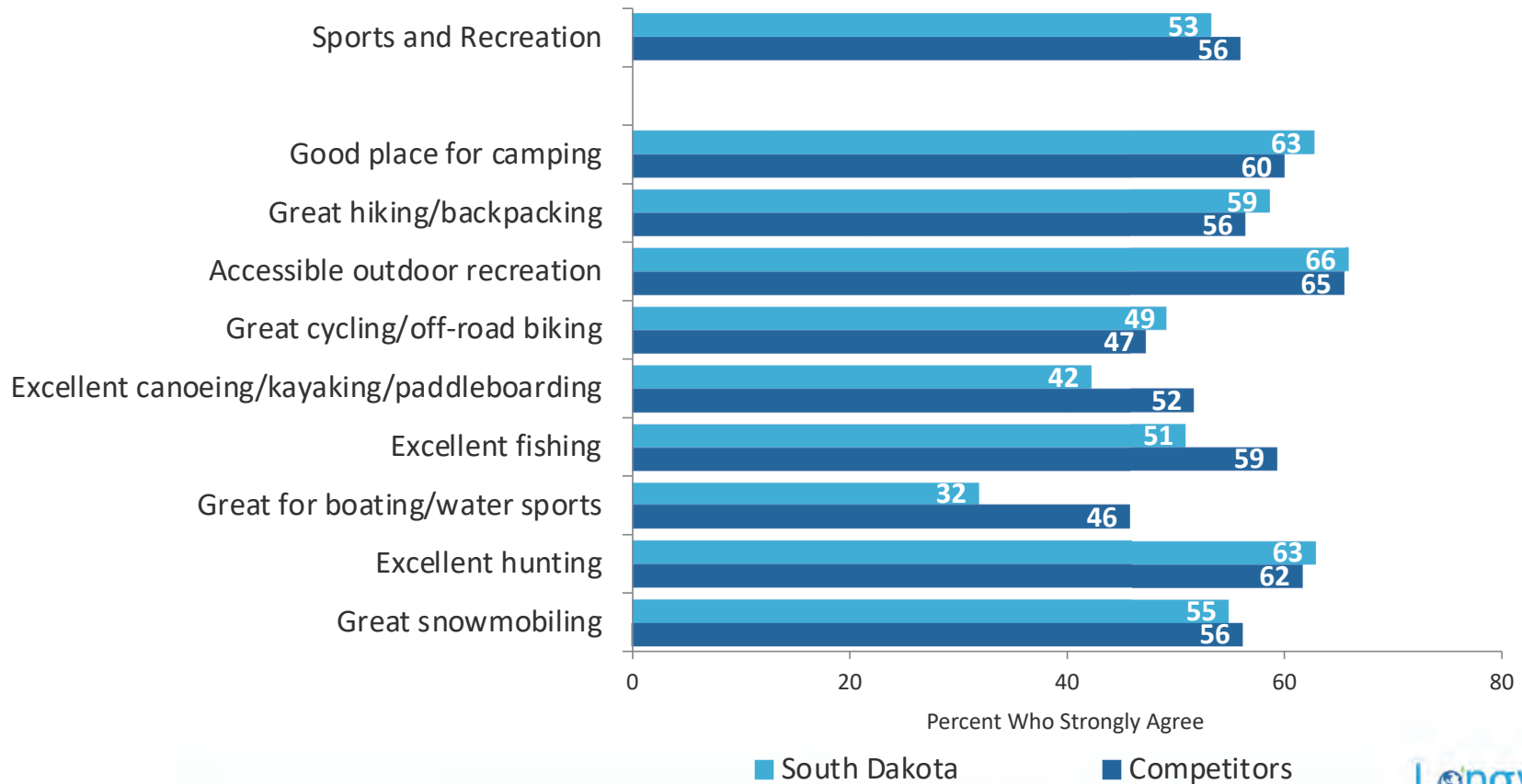
South Dakota's Image vs. Competition — Entertainment

Base: Residents of South Dakota's Regional Advertising Markets



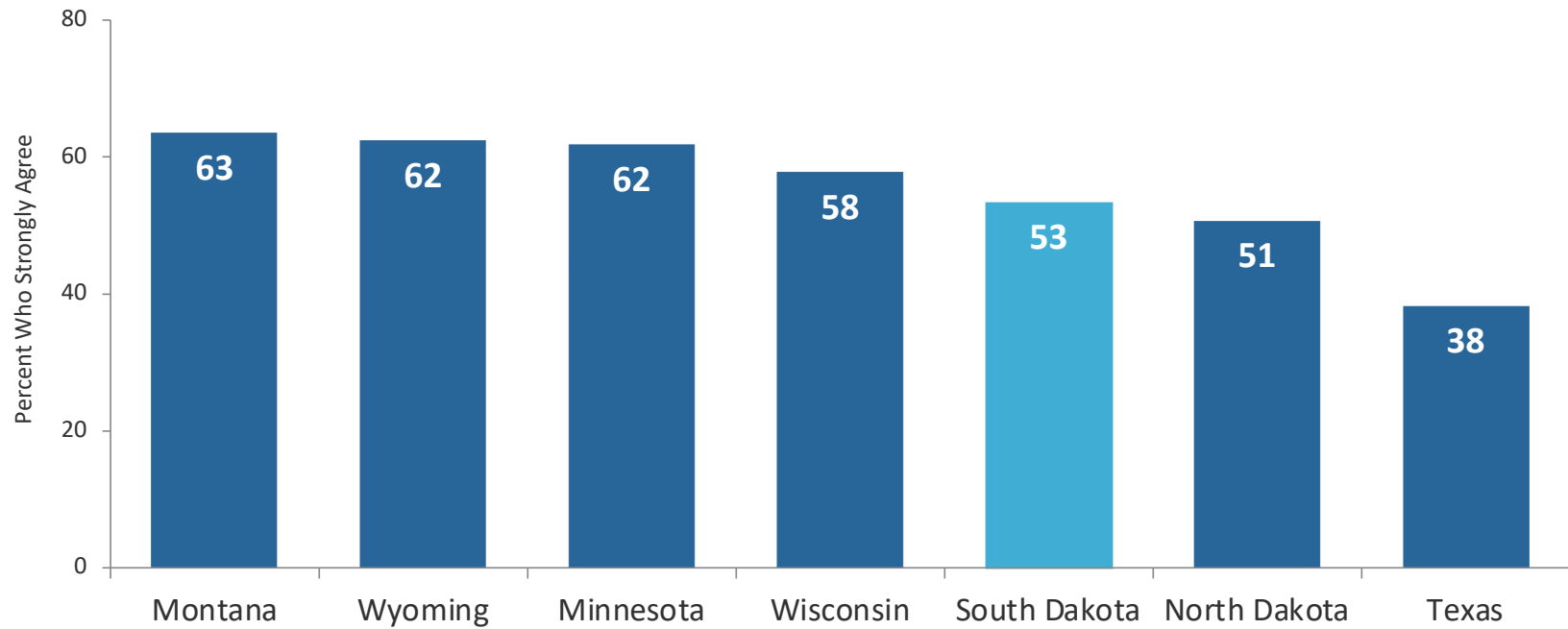
South Dakota's Image vs. Competition — Sports and Recreation

Base: Residents of South Dakota's Regional Advertising Markets



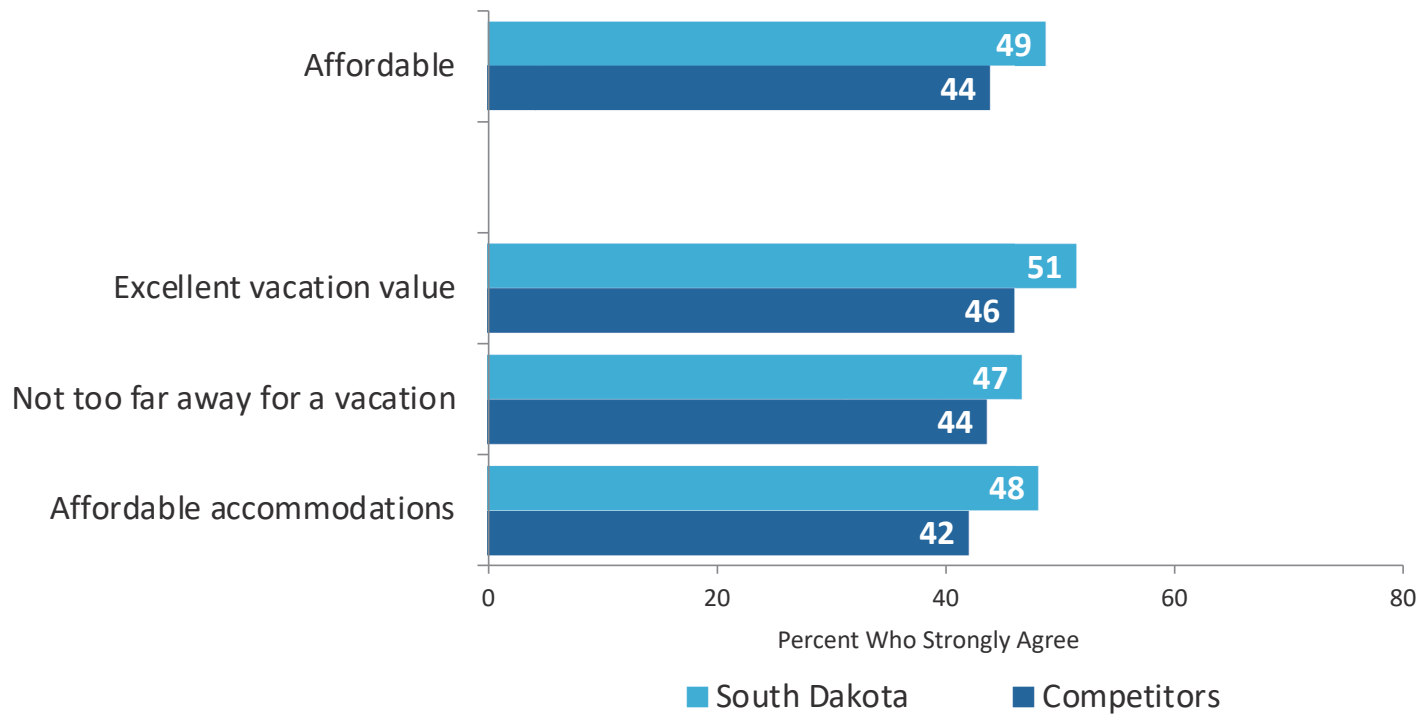
South Dakota's Image vs. Competition — Sports and Recreation

Base: Residents of South Dakota's Regional Advertising Markets



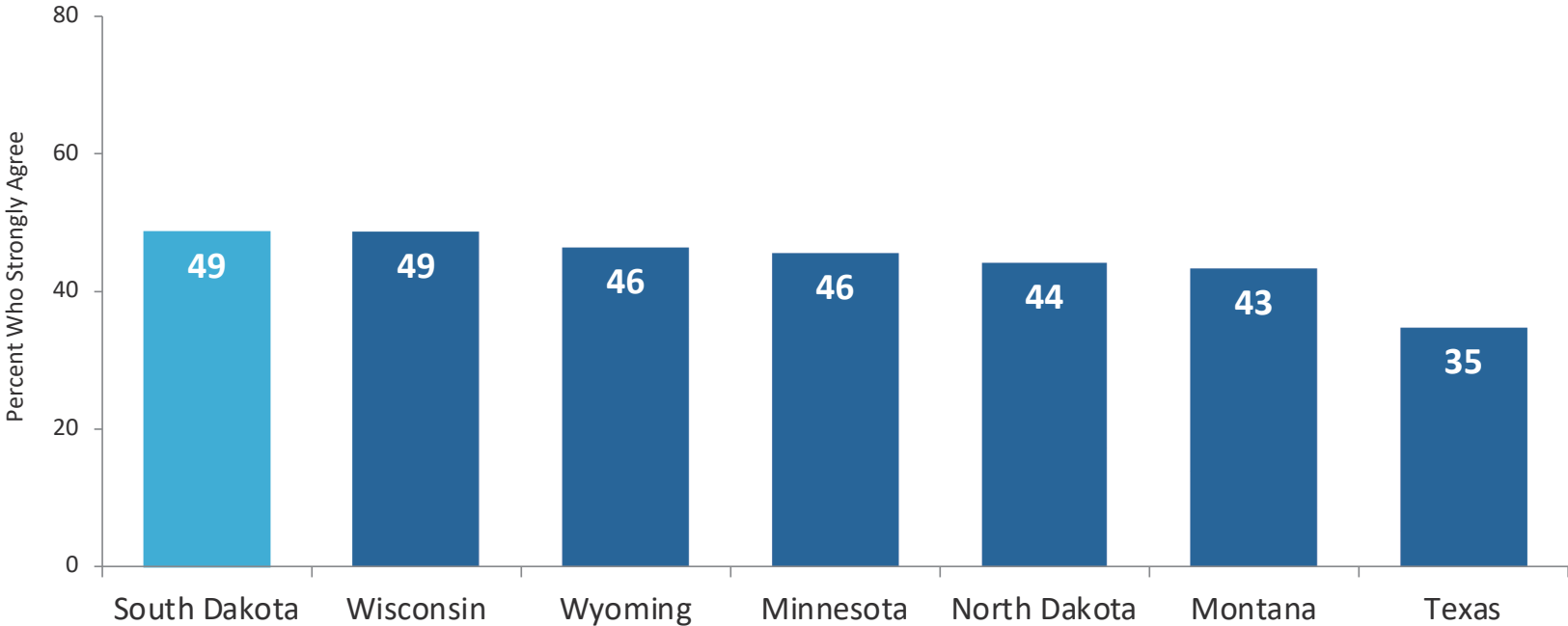
South Dakota's Image vs. Competition — Affordable

Base: Residents of South Dakota's Regional Advertising Markets



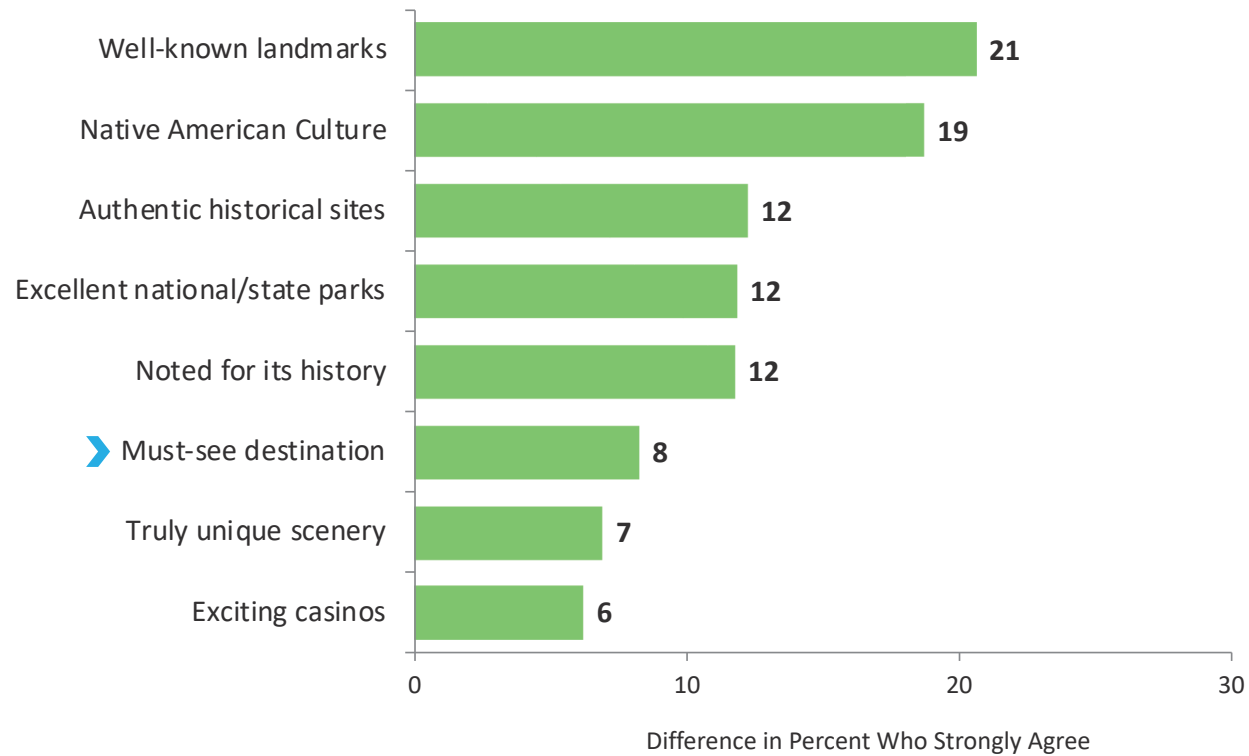
South Dakota's Image vs. Competition — Affordable

Base: Residents of South Dakota's Regional Advertising Markets



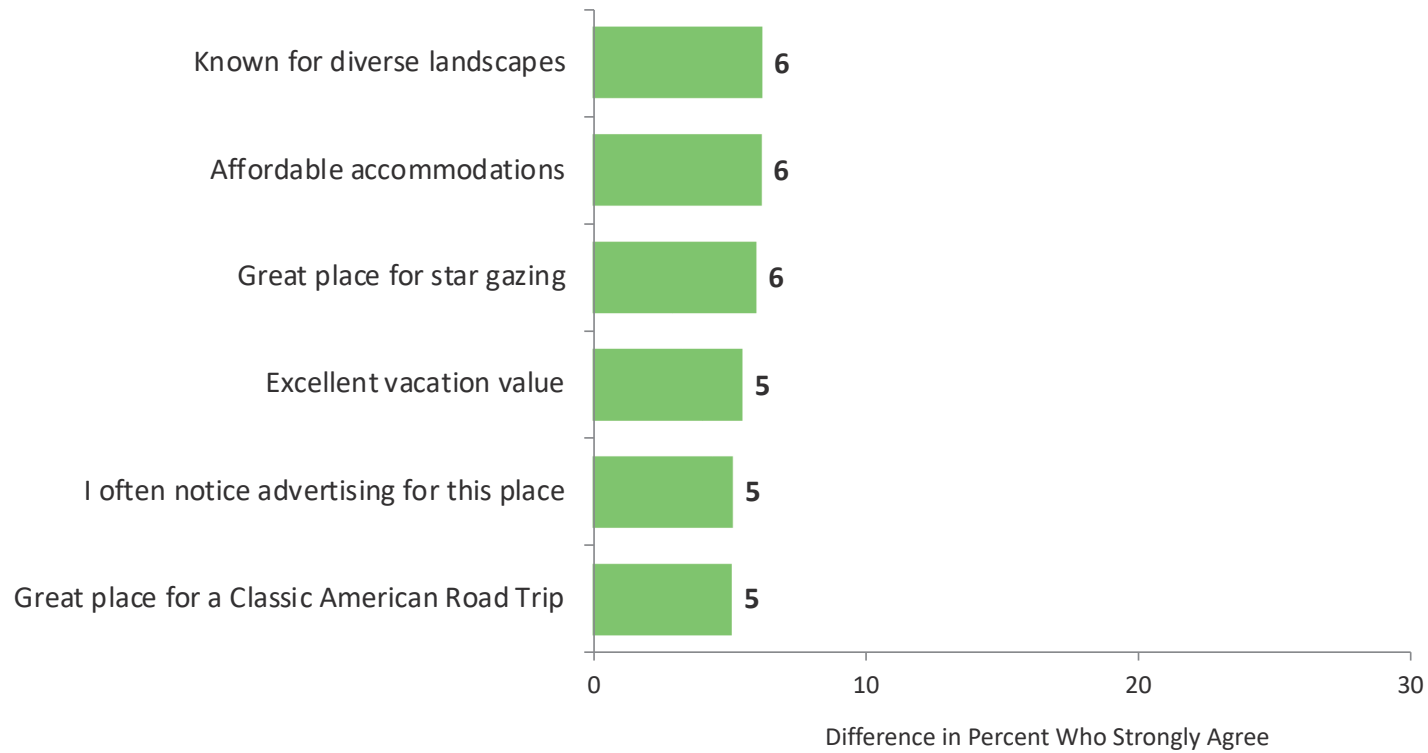
South Dakota's Image Strengths vs. Competition

Base: Residents of South Dakota's Regional Advertising Markets



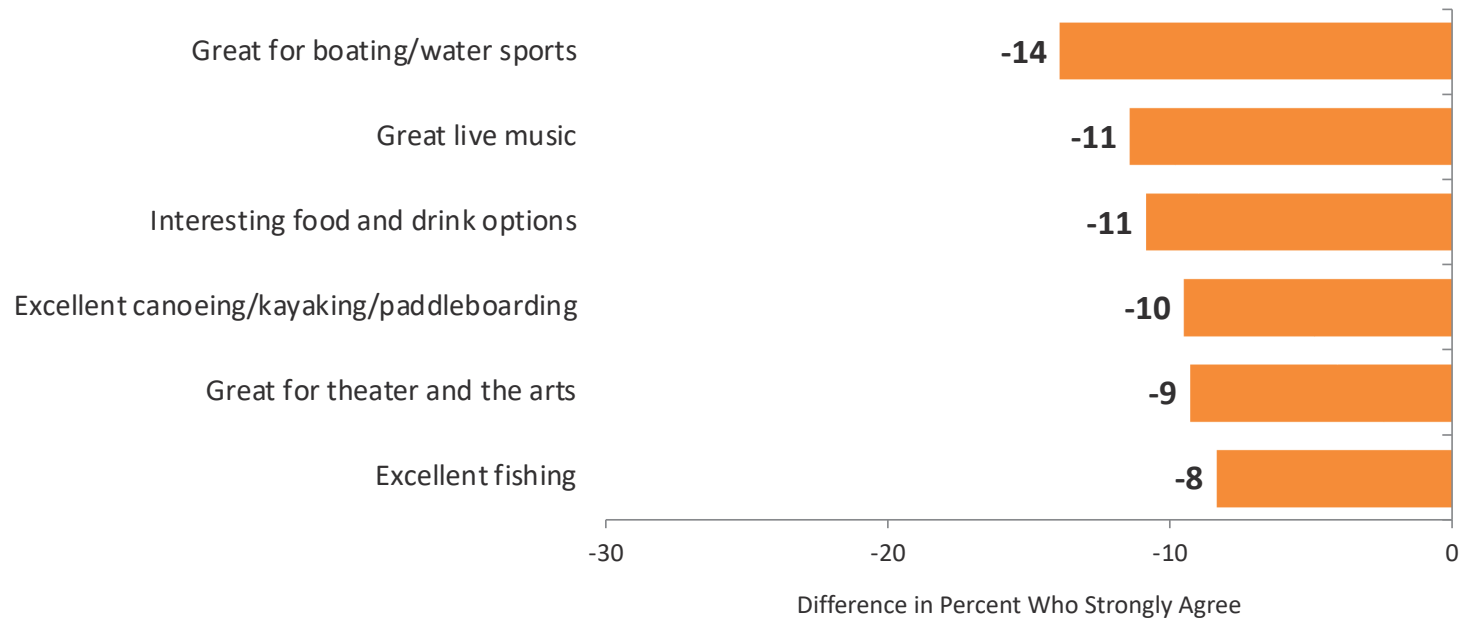
South Dakota's Image Strengths vs. Competition (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Weaknesses vs. Competition

Base: Residents of South Dakota's Regional Advertising Markets





South Dakota

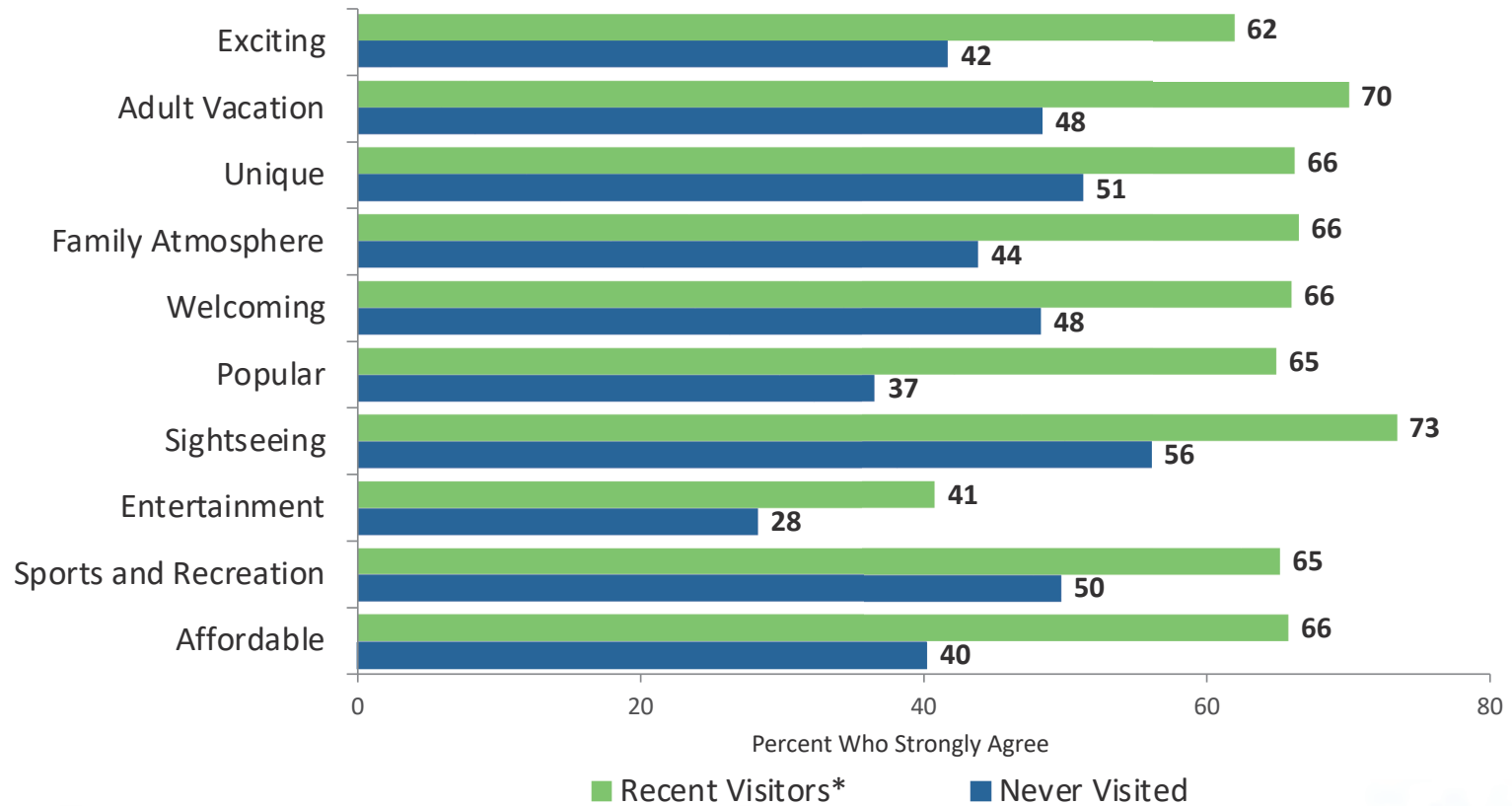
**South Dakota's
Product Delivery**

Product Delivery

- When we compare the image ratings of people who have never visited South Dakota versus the ratings of those who have visited in the past two years, we have a measure of “product delivery”, i.e., the relative satisfaction of the two groups.
- From this analysis we find that South Dakota had no significant product weaknesses.
- In fact, more recent South Dakota visitors than non-visitors rated South Dakota more favorably across all 10 Hot Button attributes:
 - Popular with vacationers
 - Children would enjoy
 - A fun place for a vacation
 - Lots to see and do
 - Good for adult vacations
 - An exciting place
 - Must-see destination
 - Good place to relax
 - Vacationing there is a real adventure
 - Unique vacation experience

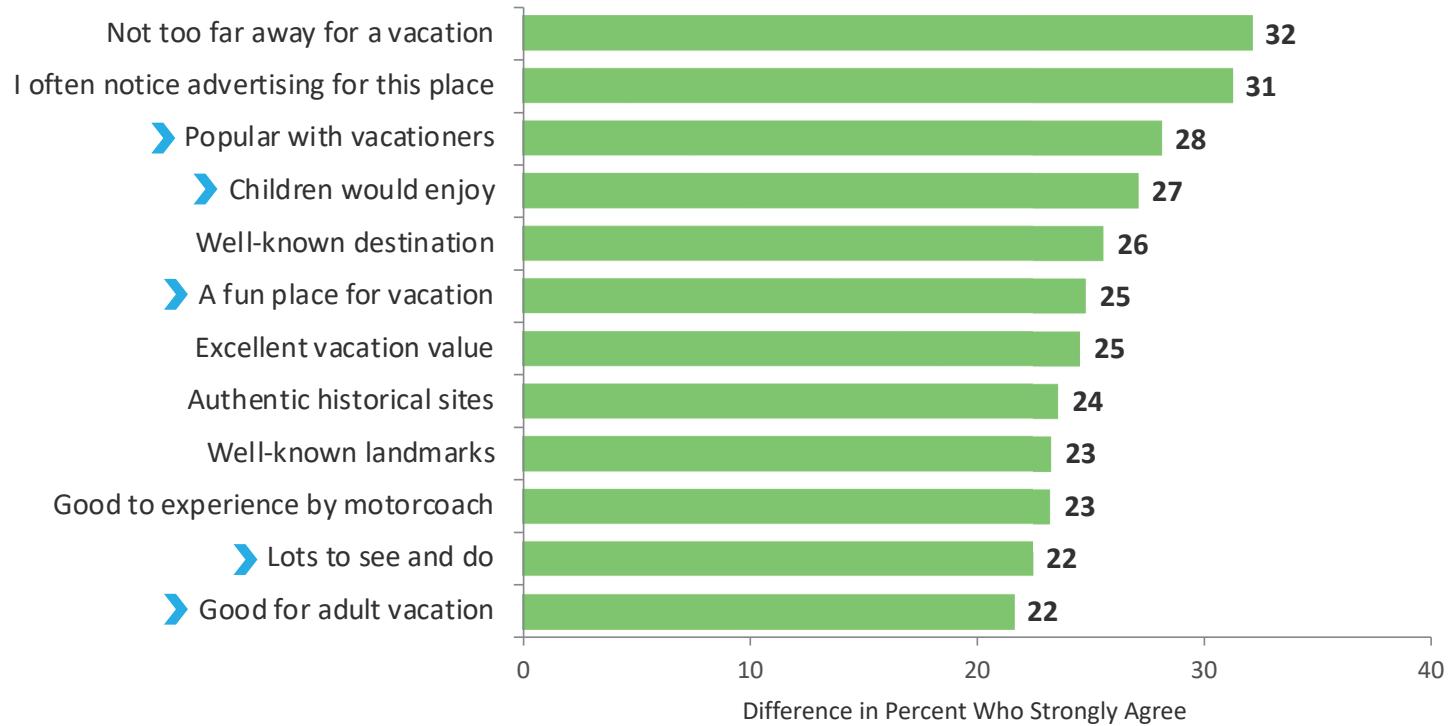
South Dakota's Product vs. Image

Base: Residents of South Dakota's Regional Advertising Markets



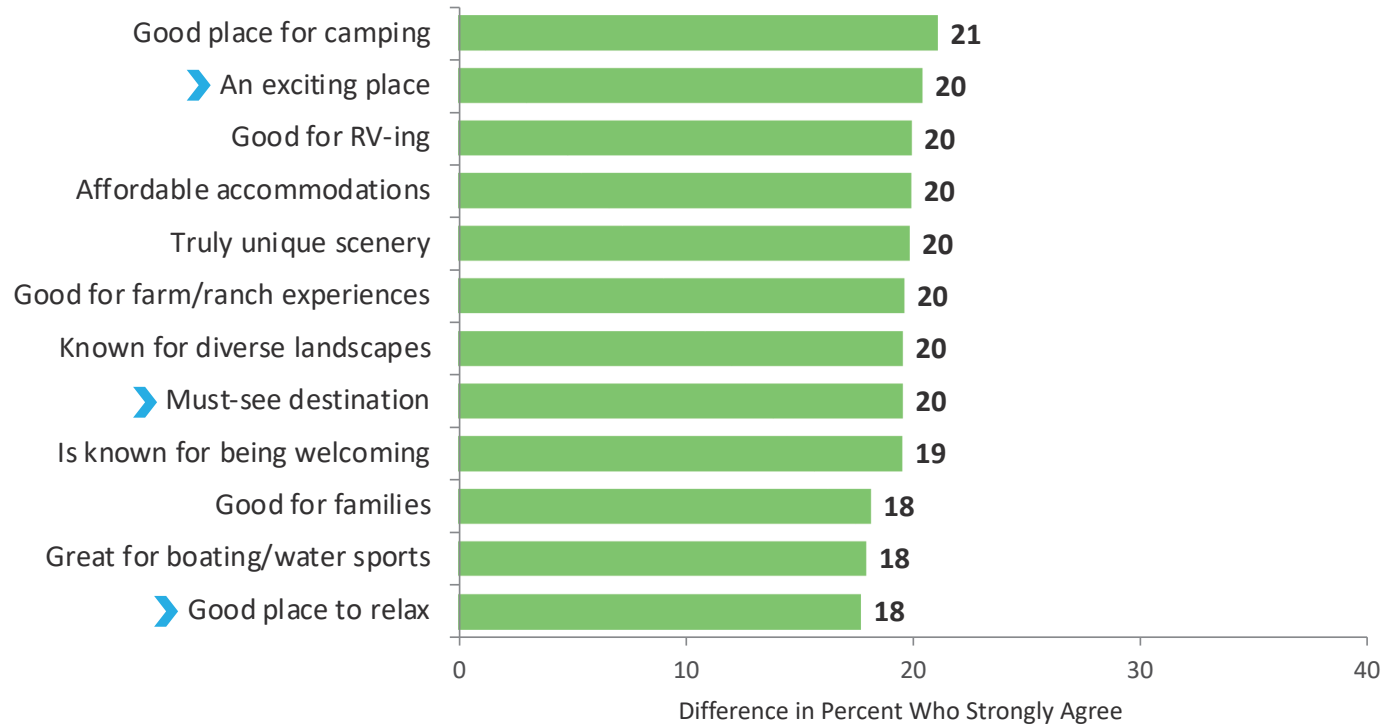
Top Product Strengths vs. Image

Base: Residents of South Dakota's Regional Advertising Markets



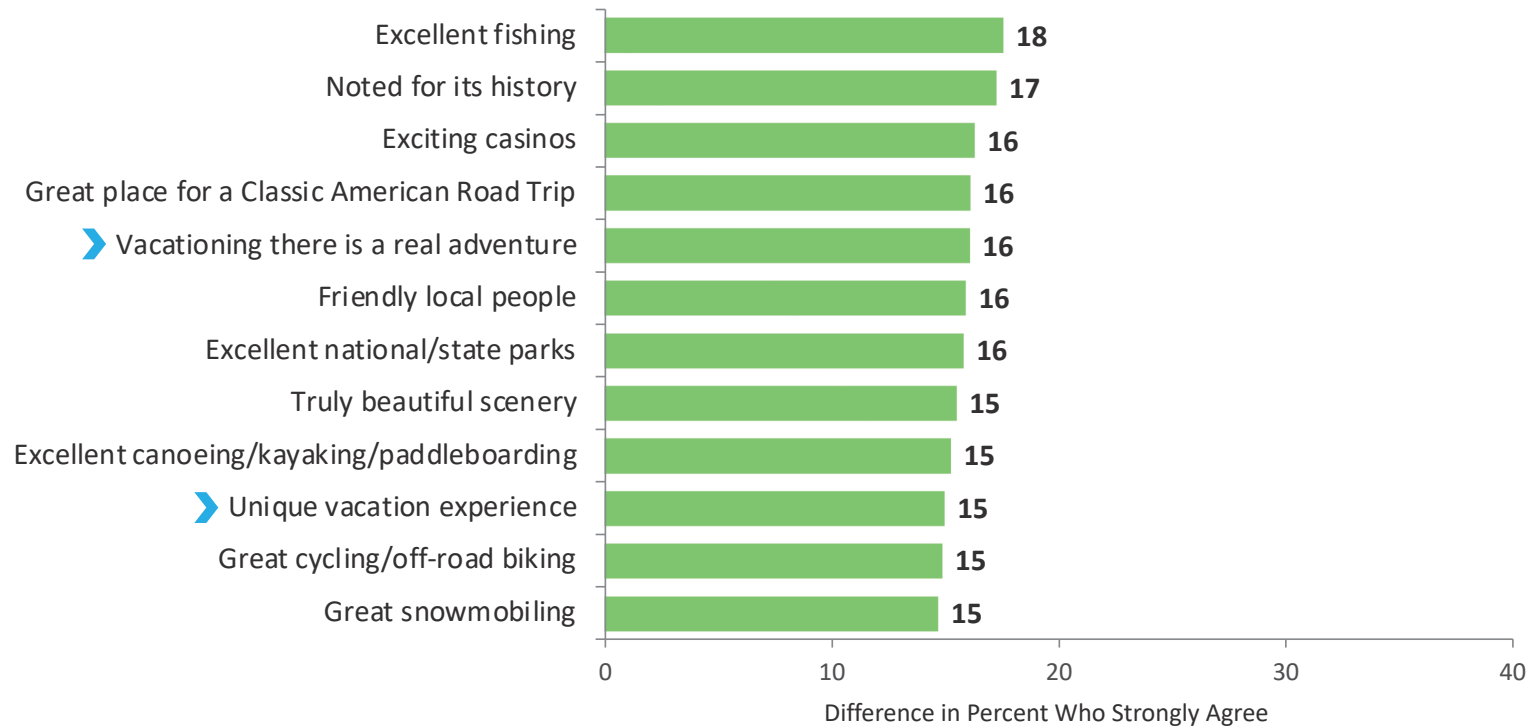
Top Product Strengths vs. Image (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



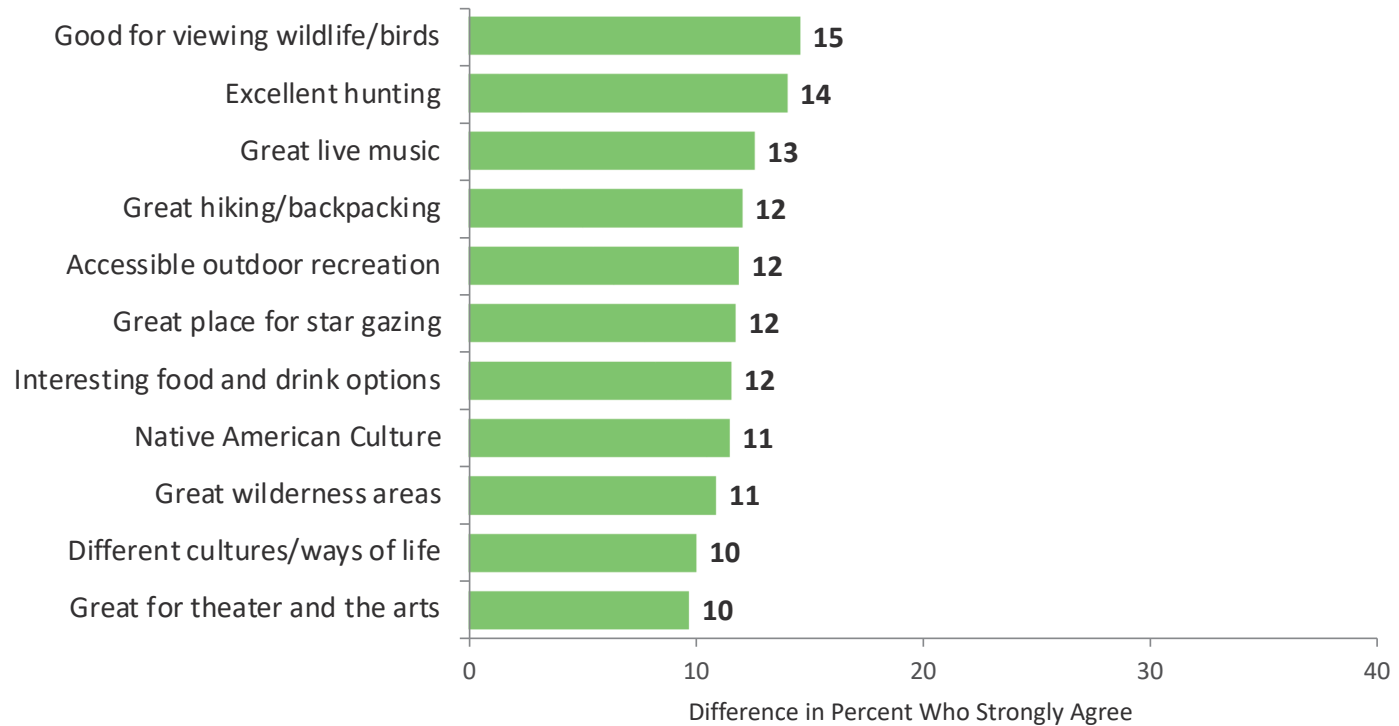
Top Product Strengths vs. Image (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



Top Product Strengths vs. Image (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



Top Product Weaknesses vs. Image

Base: Residents of South Dakota's Regional Advertising Markets

**THERE WERE NO SIGNIFICANT
PERCEIVED PRODUCT
WEAKNESSES VS. IMAGE**



South Dakota

Halo Effect on Economic Development Image

Halo Effect Analysis

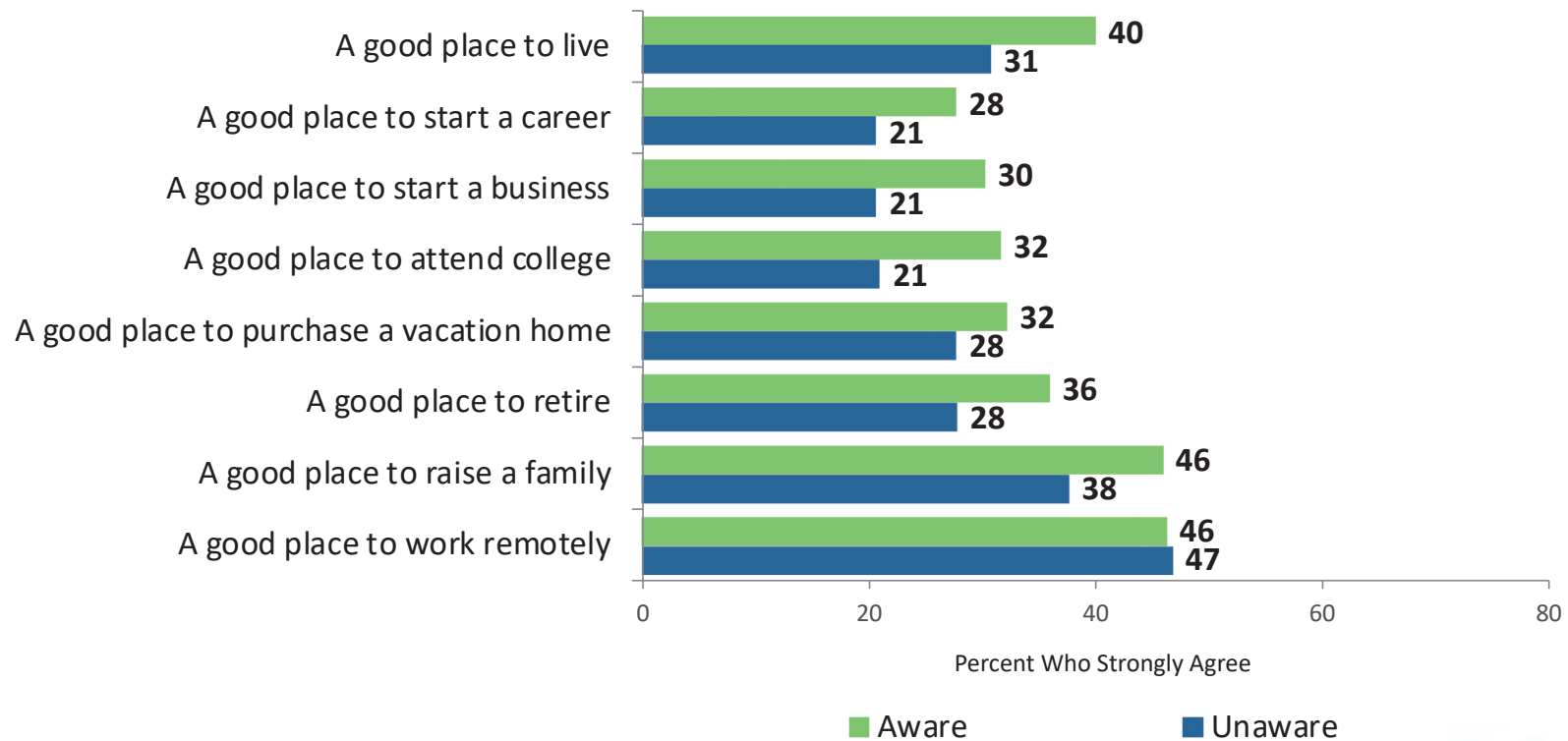
- Research has long demonstrated that tourism advertising and the visitation it inspires have a positive impact on consumers' image of destinations as a place for leisure travel and recreation.
- Applying the psychological concept of the “halo effect” to tourism promotion advertising, Longwoods set out to determine if gains in image for South Dakota from its tourism advertising would extend beyond the appeal as a place to visit. Could it be that economic objectives could also be achieved, such as viewing South Dakota more favorably as a place to live, work, start a business, attend college, purchase a vacation home and retire?
- Longwoods International has conducted this research for multiple state and city destinations across the U.S since 2014.

Halo Effect Analysis (Cont'd)

- The research compared consumers' ratings of South Dakota on economic development image attributes by those who had not seen the campaign or visited South Dakota with those who did see the tourism ads and/or visited.
- In every case except a place to work remotely, South Dakota's tourism advertising significantly improved the image of South Dakota across this wide range of economic development objectives.
- Those who visited the state during the past 2 years rated South Dakota higher on all the economic development indicators included in the study.
- For each economic development objective, the most dramatic improvement in image was among those consumers who were both exposed to the advertising campaign message and who also visited South Dakota.

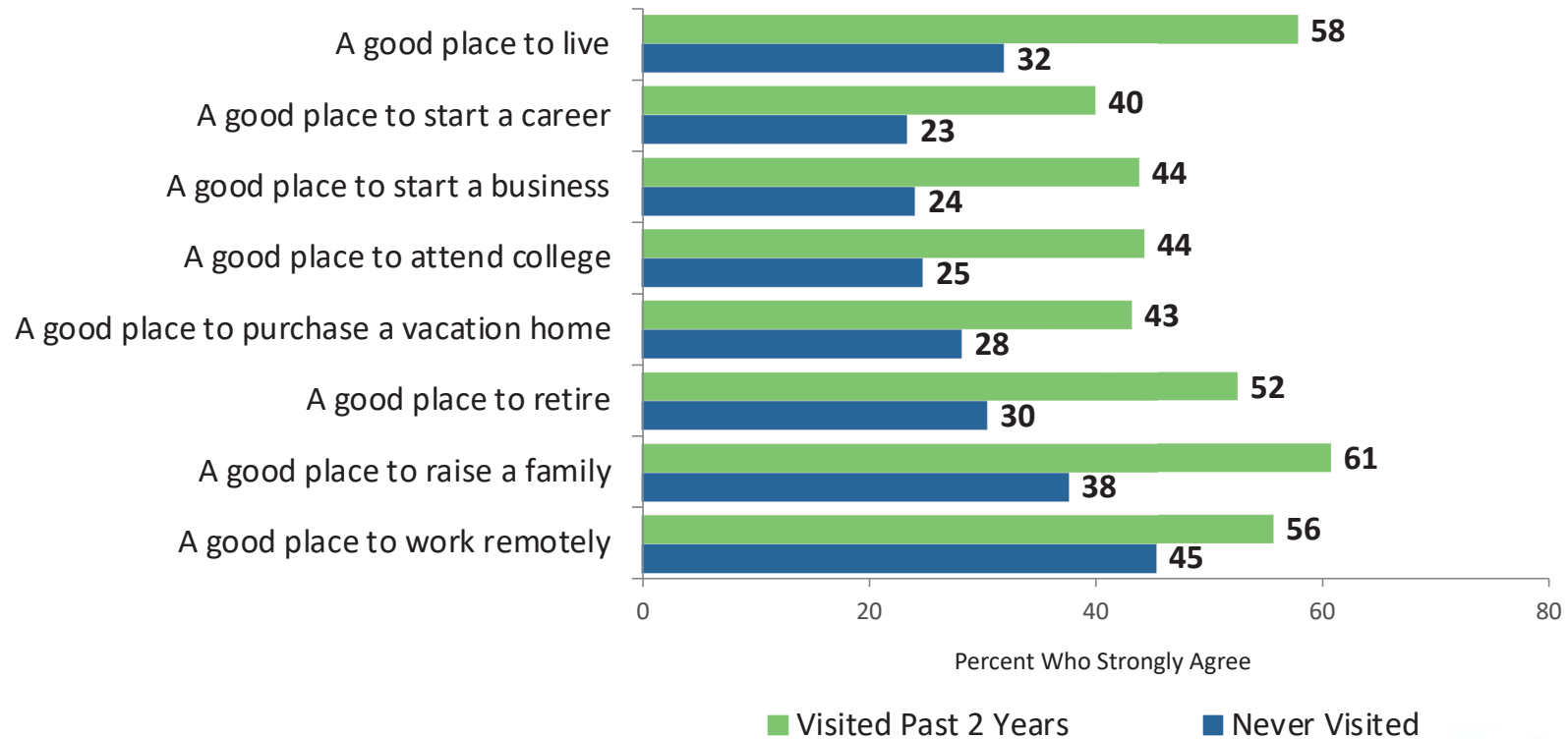
Impact of *Tourism Ad Awareness* on South Dakota's Economic Development Image

Base: Out-of-State Residents of South Dakota's Advertising Markets



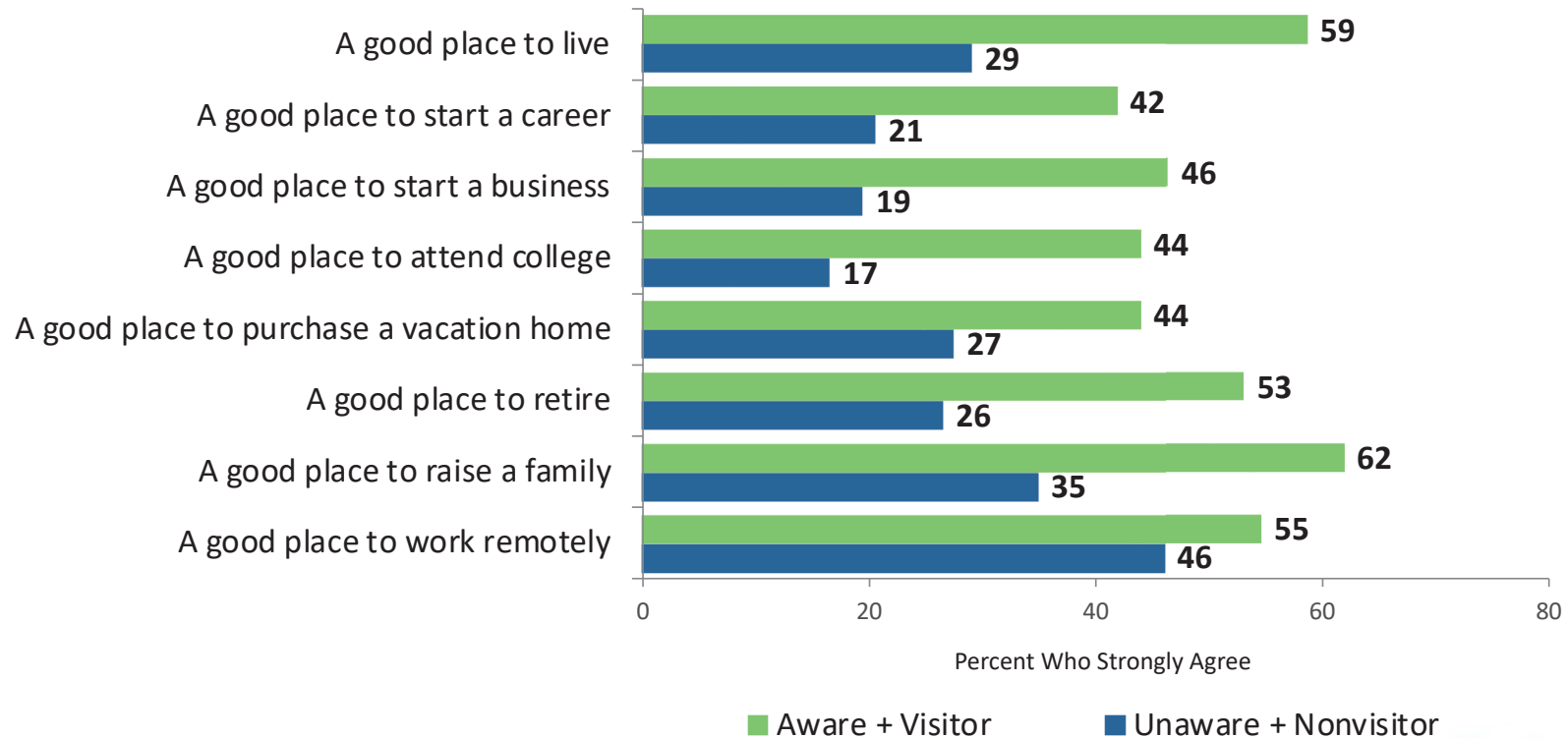
Impact of *Visitation* on South Dakota's Economic Development Image

Base: Out-of-State Residents of South Dakota's Advertising Markets



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

Base: Out-of-State Residents of South Dakota's Advertising Markets



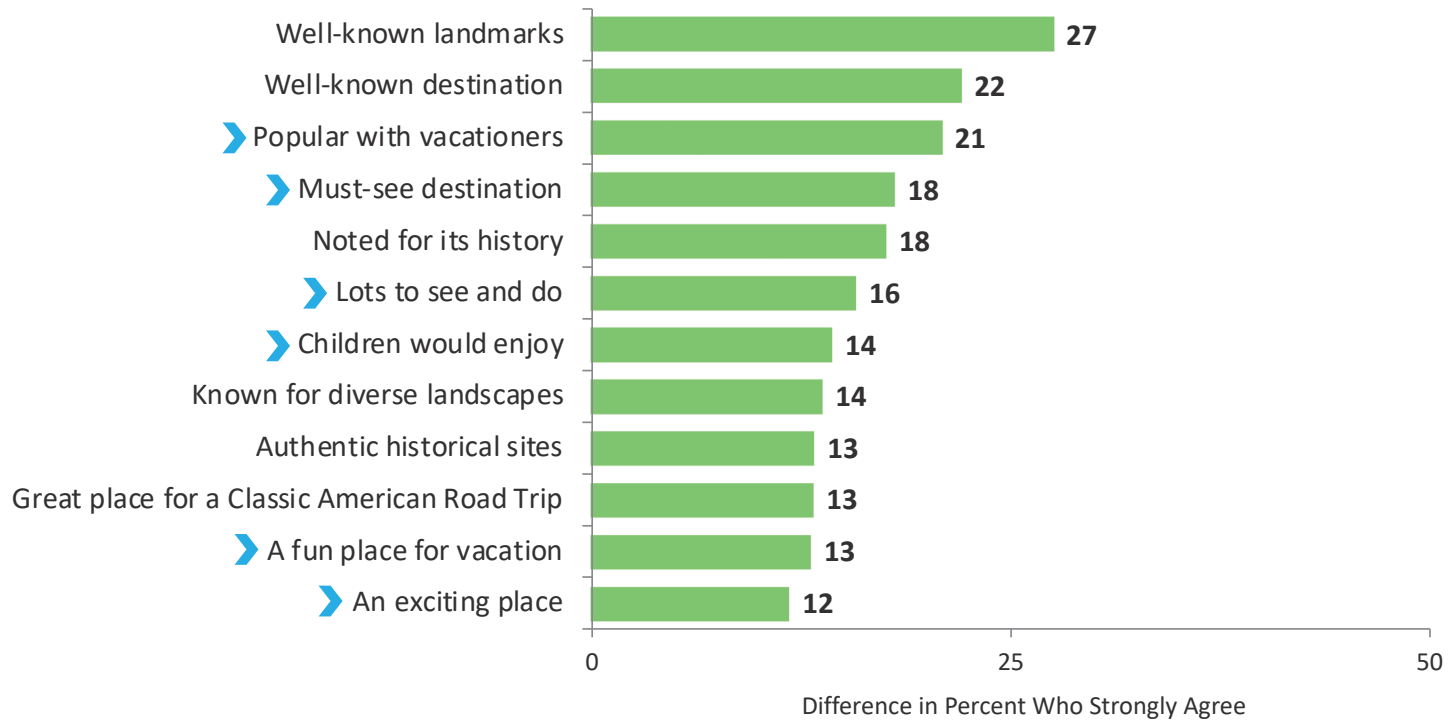
South Dakota

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**Appendix: South Dakota's
Image Strengths &
Weaknesses vs.
Individual Competitors**

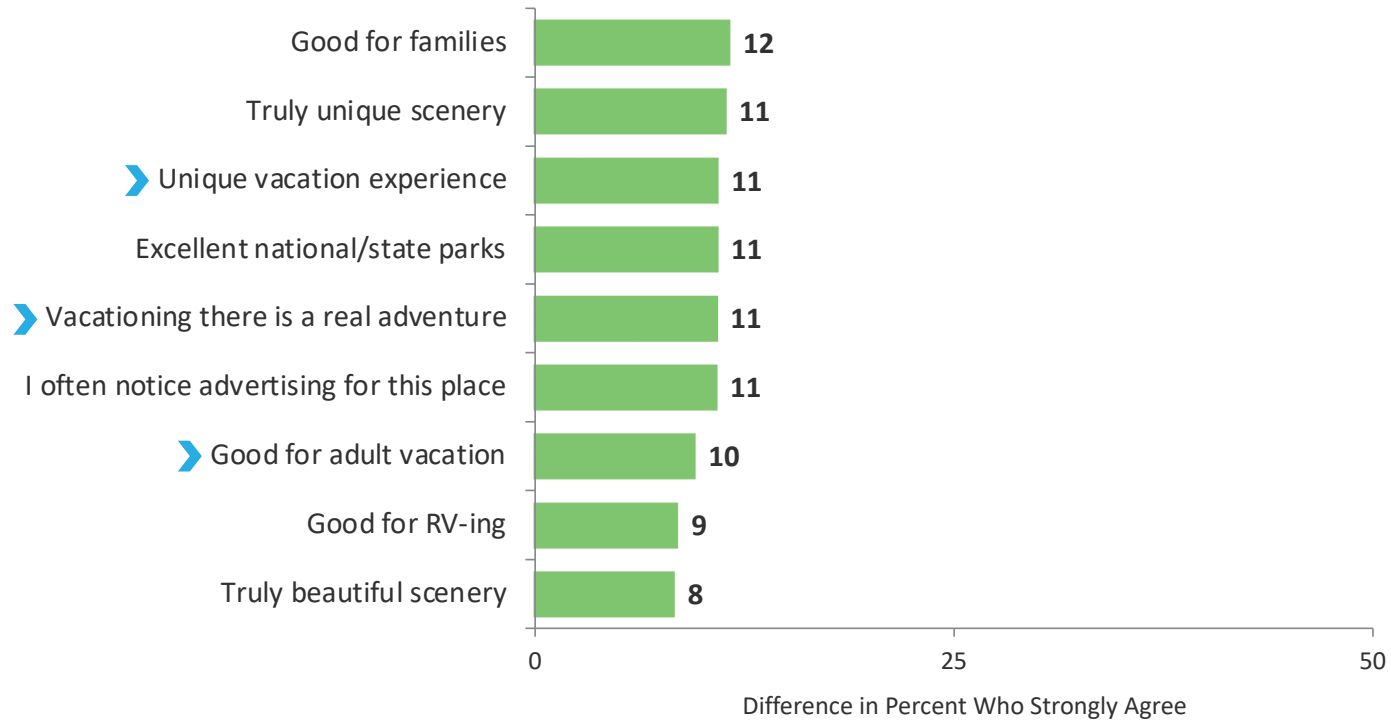
South Dakota's Image Strengths vs. North Dakota

Base: Residents of South Dakota's Regional Advertising Markets



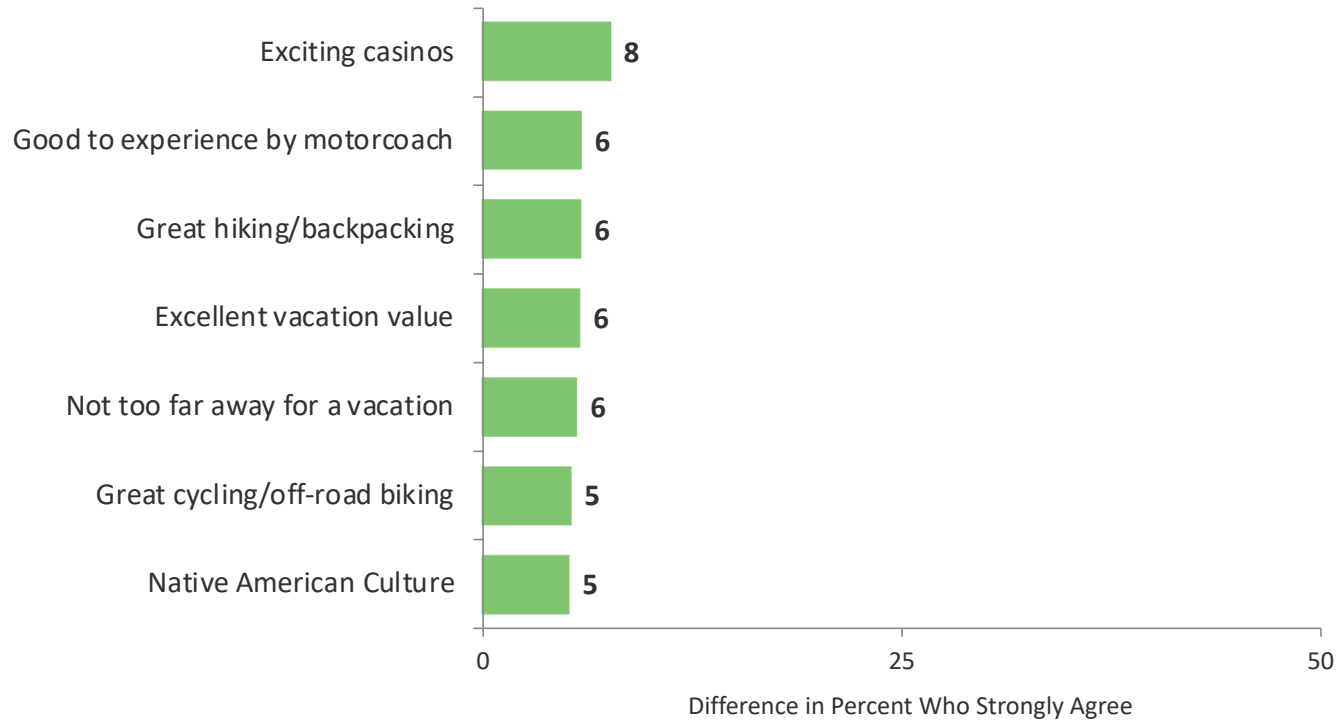
South Dakota's Image Strengths vs. North Dakota (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



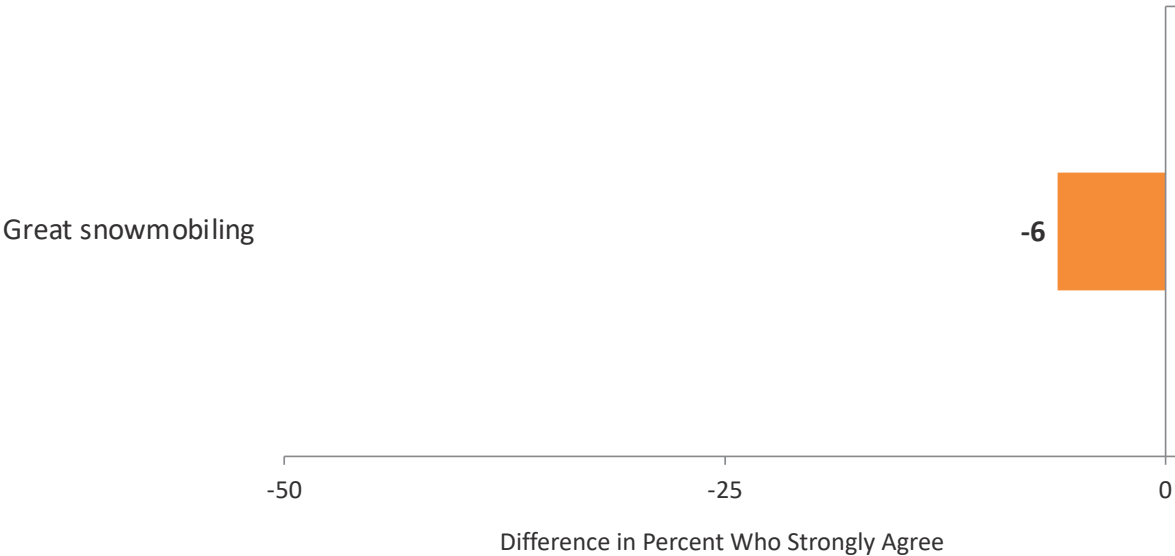
South Dakota's Image Strengths vs. North Dakota (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



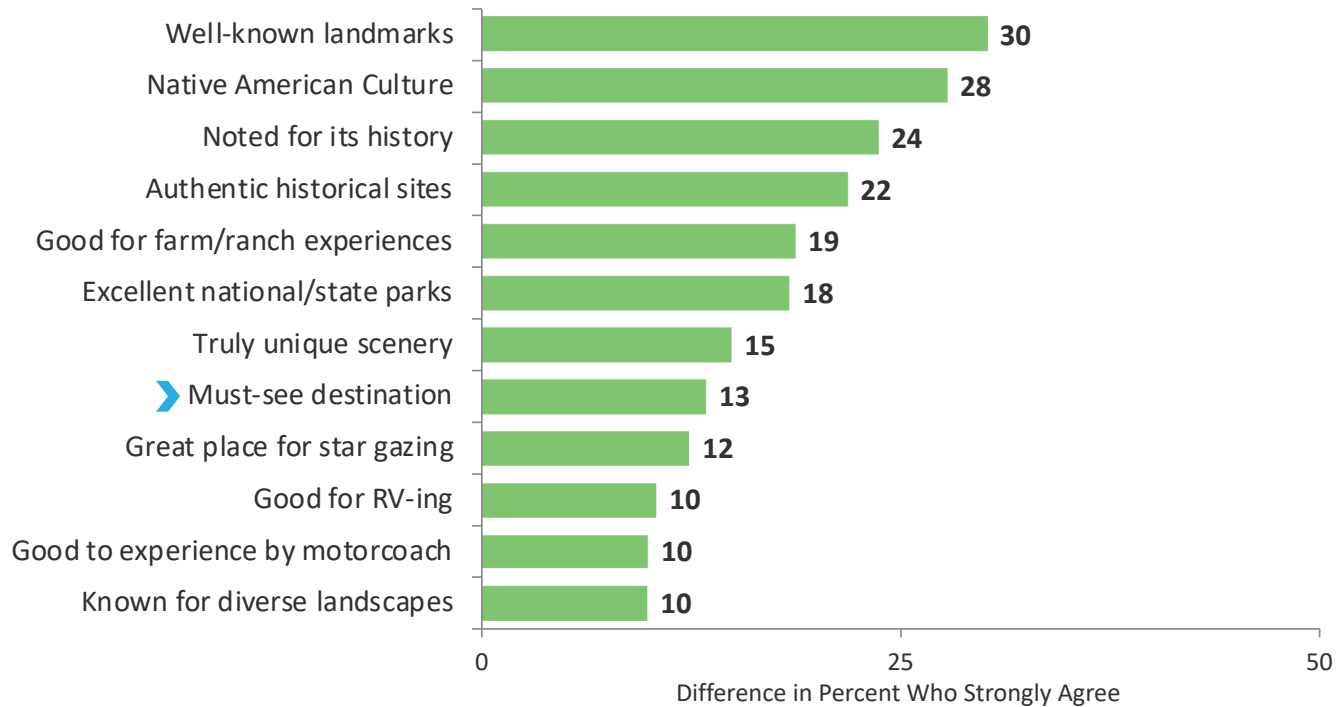
South Dakota's Image Weaknesses vs. North Dakota

Base: Residents of South Dakota's Regional Advertising Markets



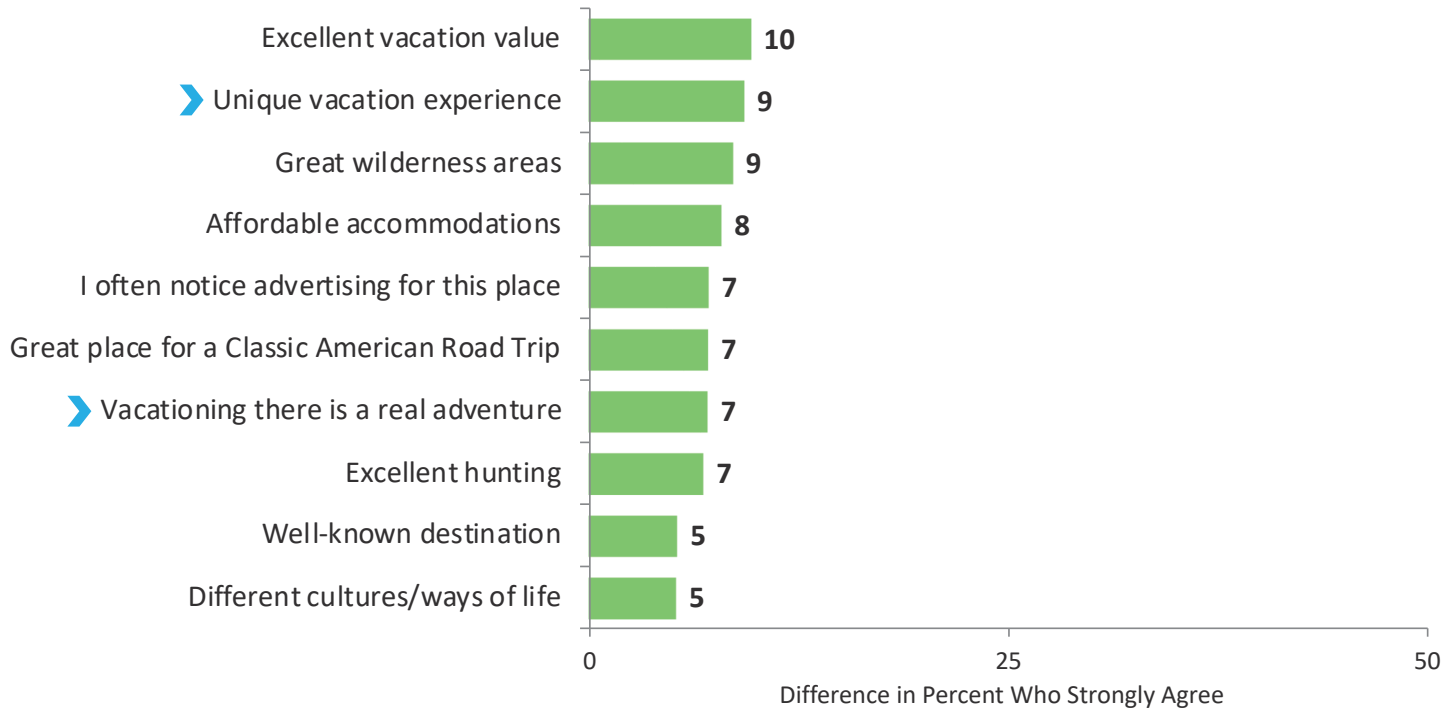
South Dakota's Image Strengths vs. Minnesota

Base: Residents of South Dakota's Regional Advertising Markets



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

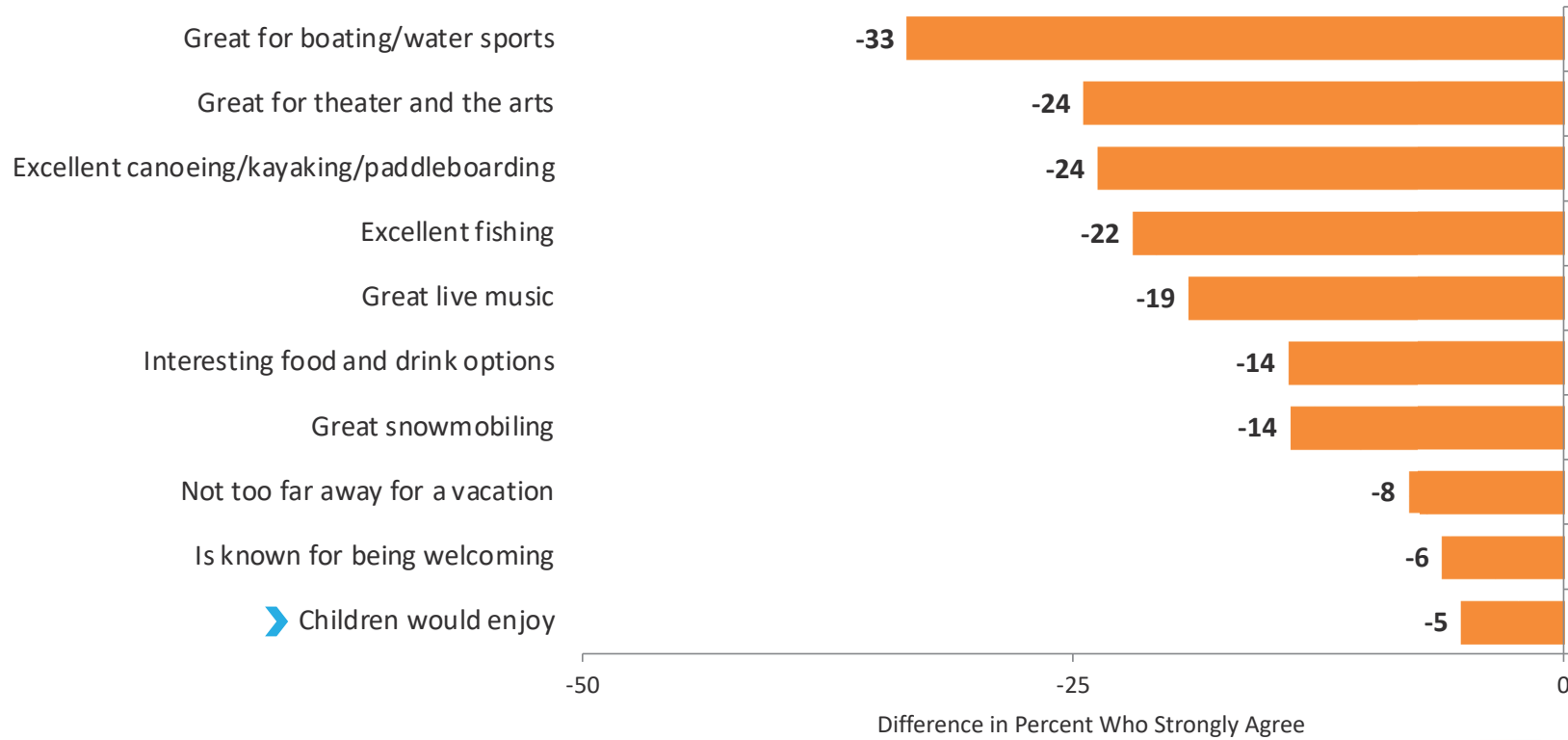
Base: Residents of South Dakota's Regional Advertising Markets



* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

South Dakota's Image Weaknesses vs. Minnesota

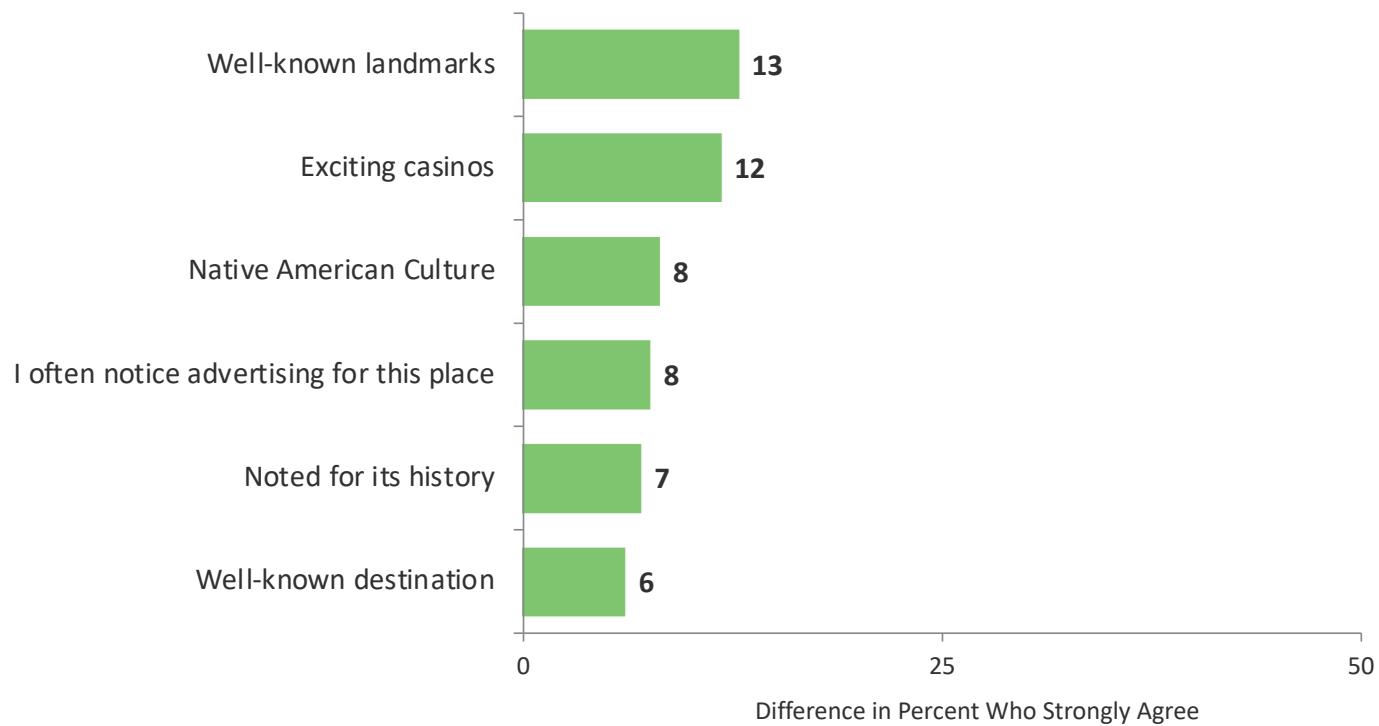
Base: Residents of South Dakota's Regional Advertising Markets



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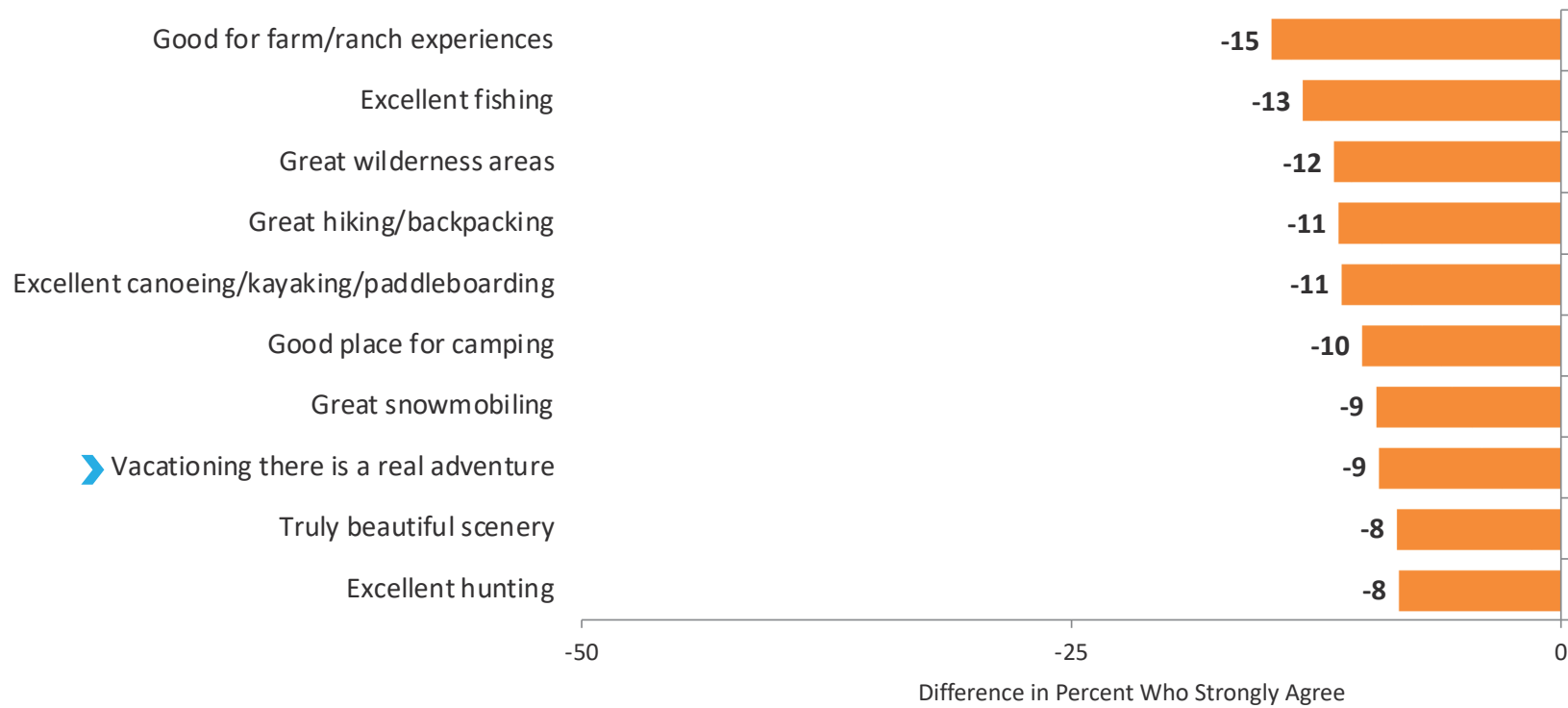
South Dakota's Image Strengths vs. Wyoming

Base: Residents of South Dakota's Regional Advertising Markets



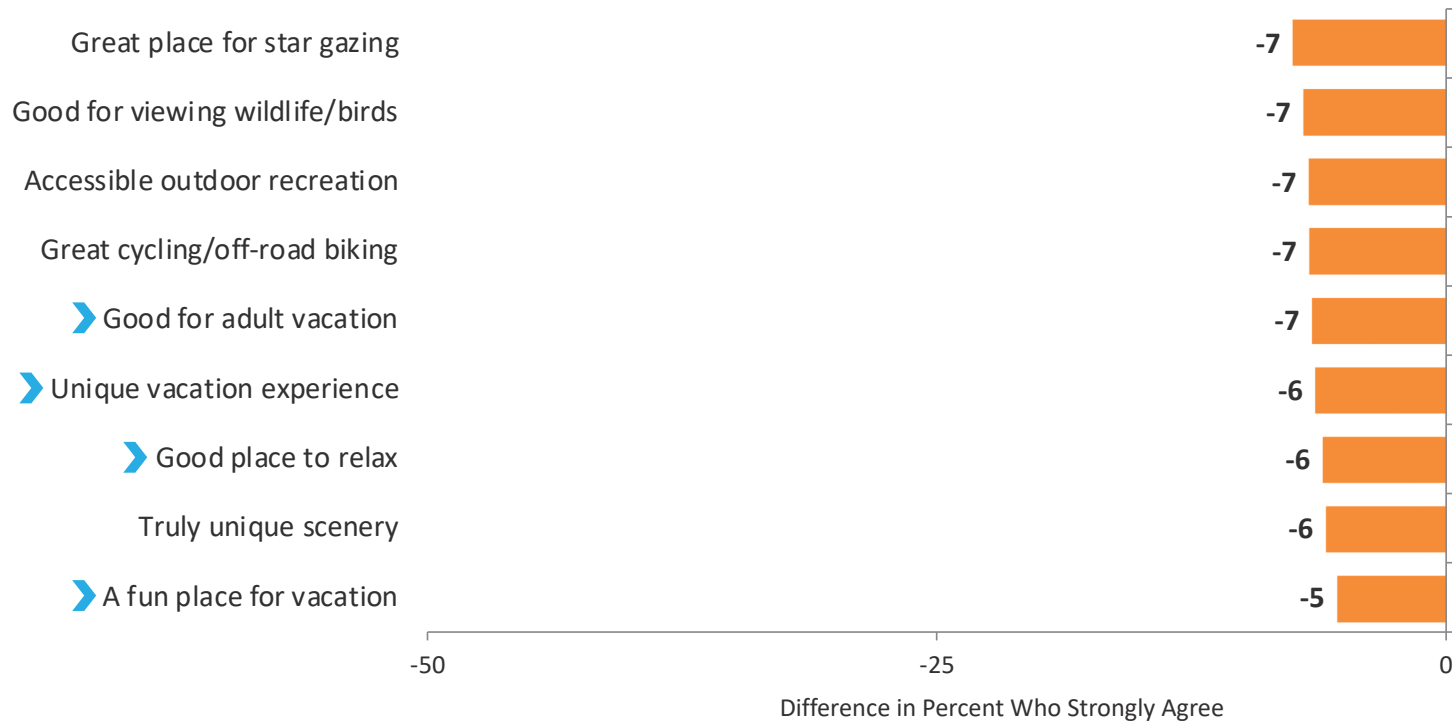
South Dakota's Image Weaknesses vs. Wyoming

Base: Residents of South Dakota's Regional Advertising Markets



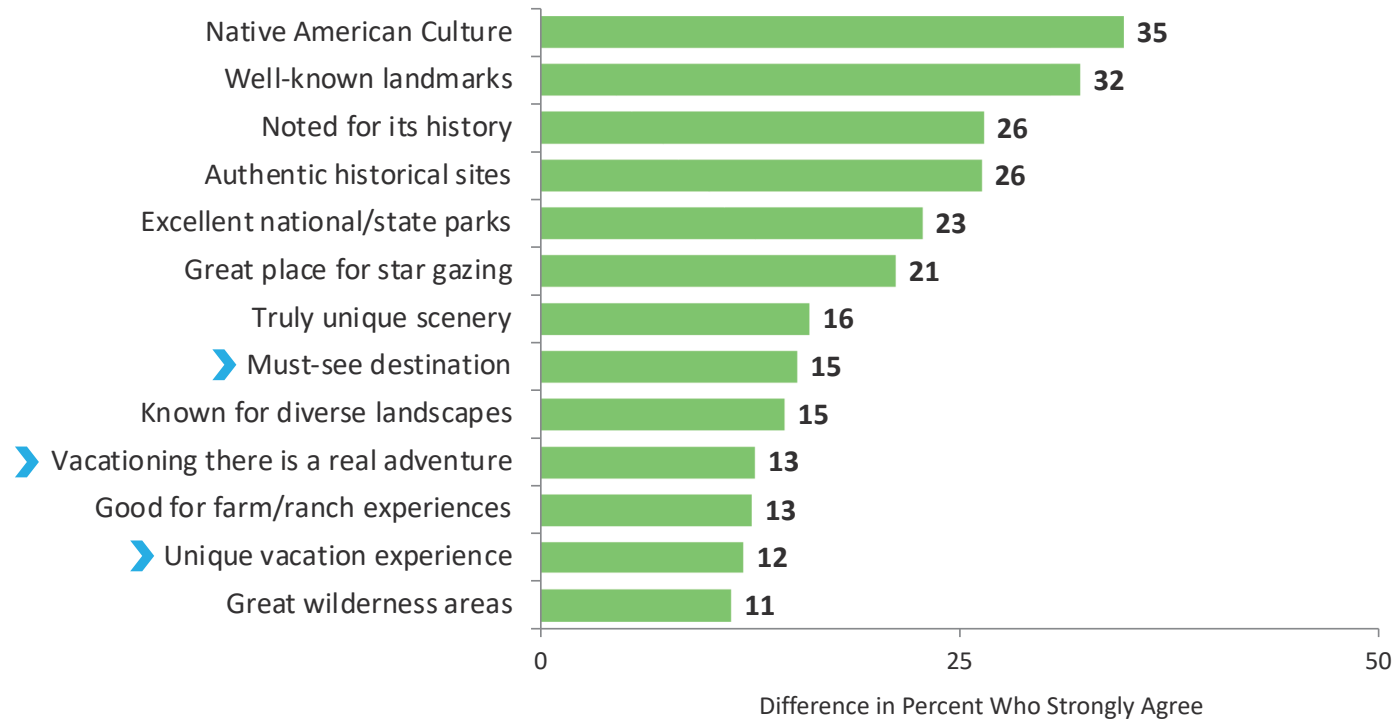
South Dakota's Image Weaknesses vs. Wyoming (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



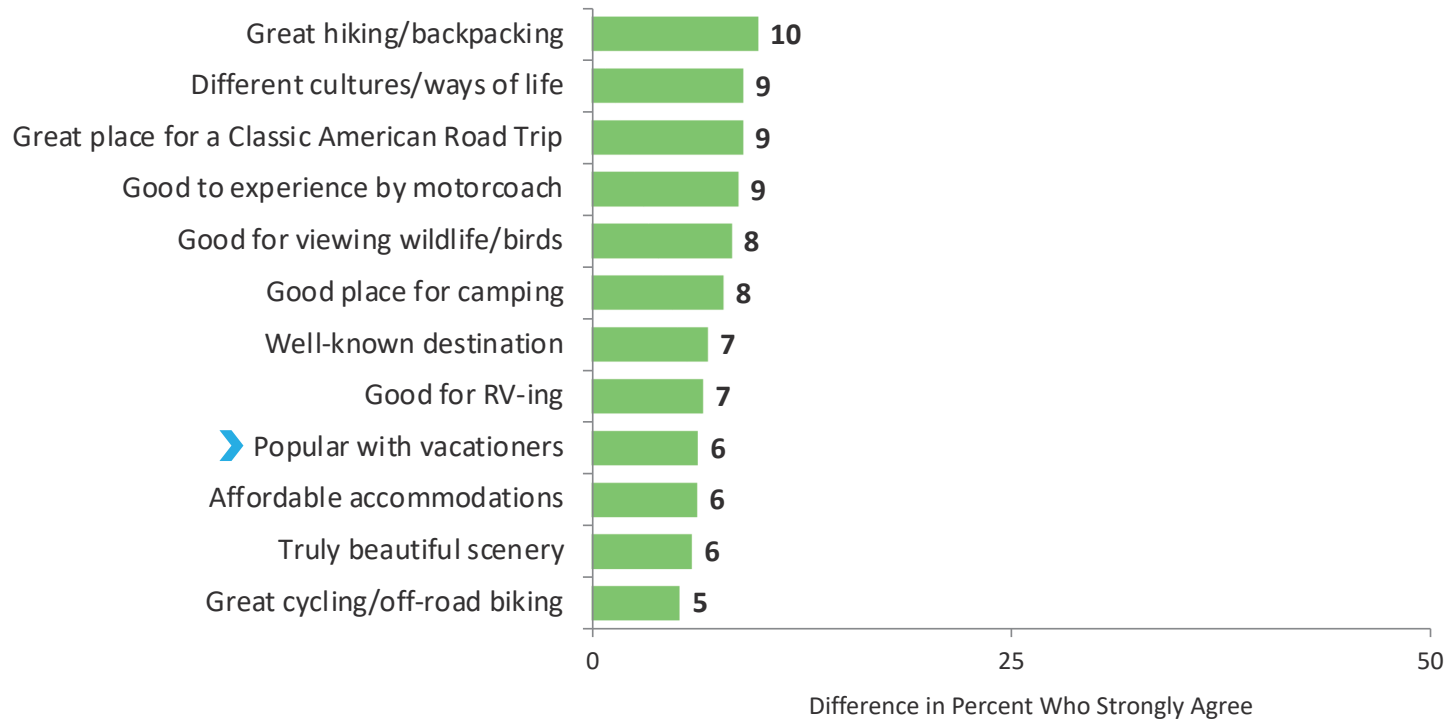
South Dakota's Image Strengths vs. Wisconsin

Base: Residents of South Dakota's Regional Advertising Markets



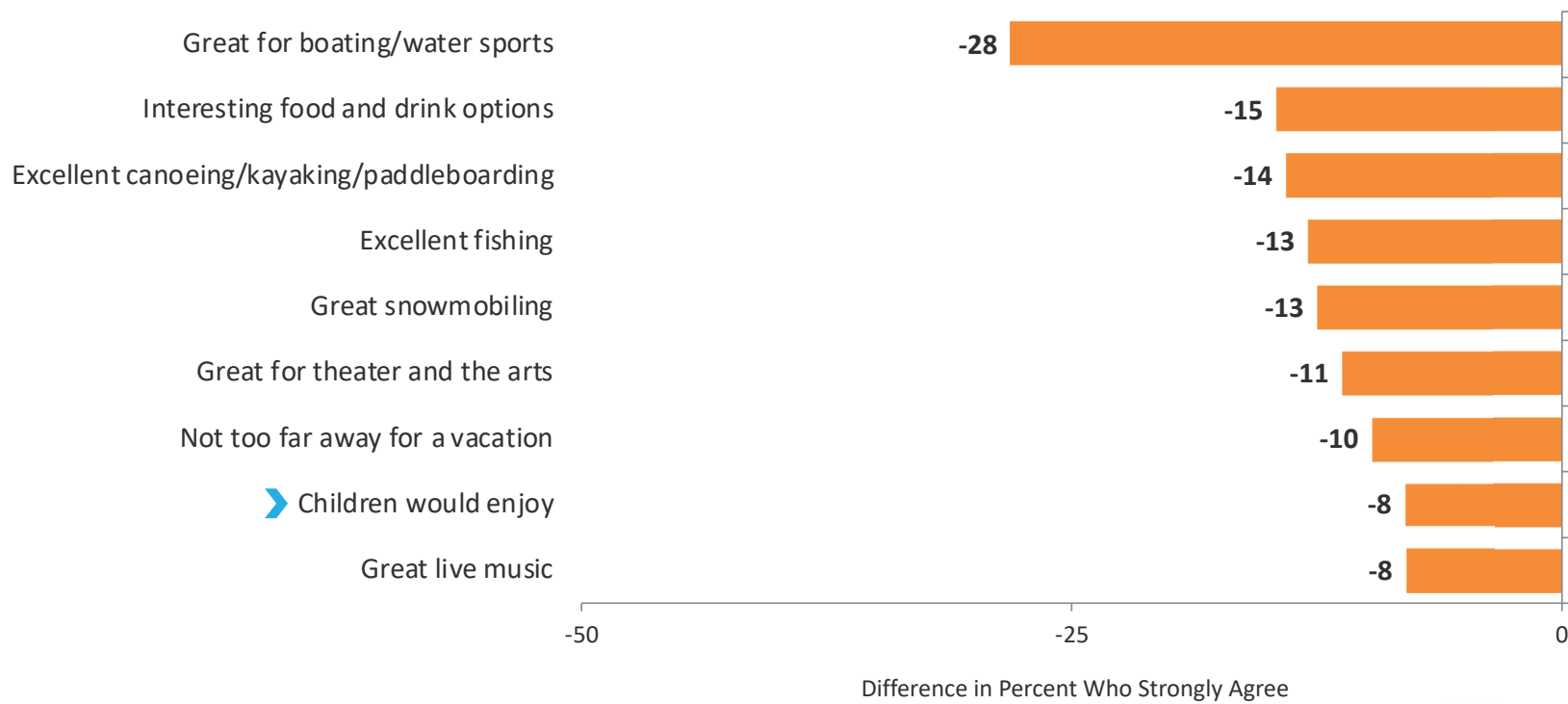
South Dakota's Image Strengths vs. Wisconsin (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



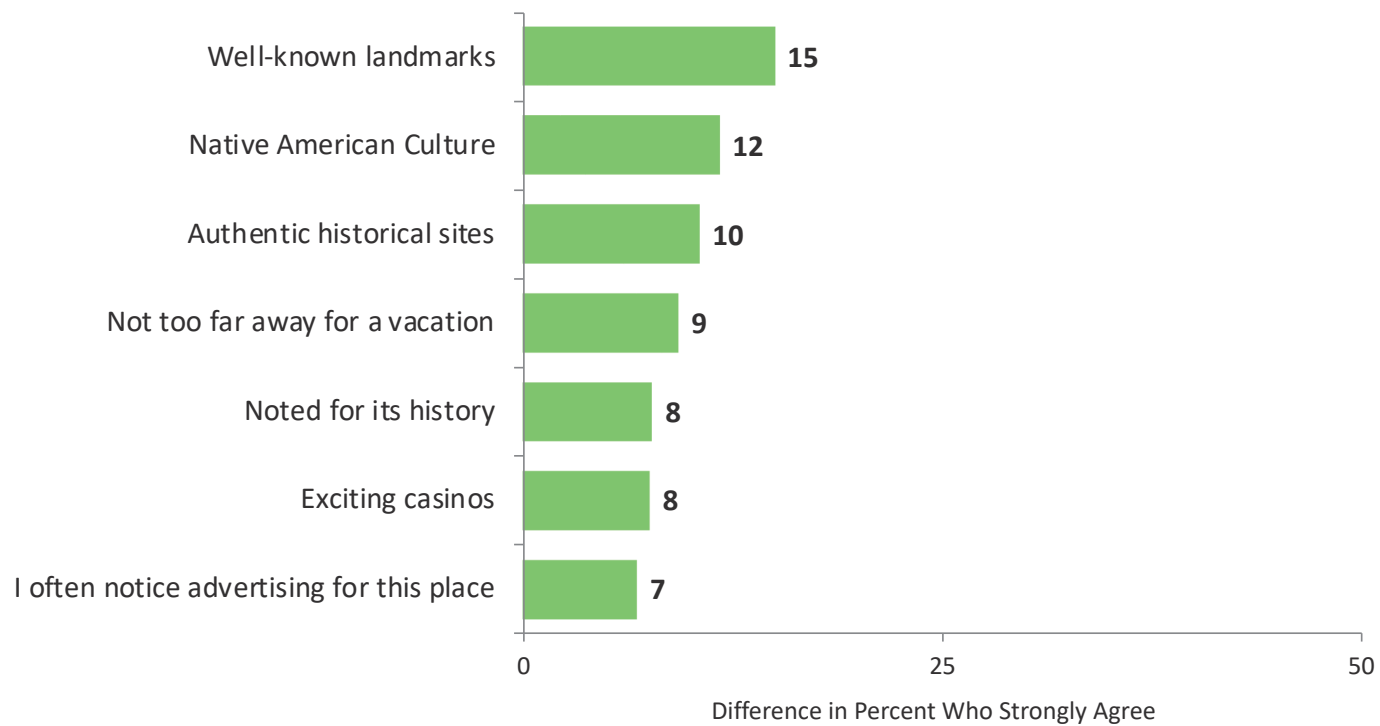
South Dakota's Image Weaknesses vs. Wisconsin

Base: Residents of South Dakota's Regional Advertising Markets



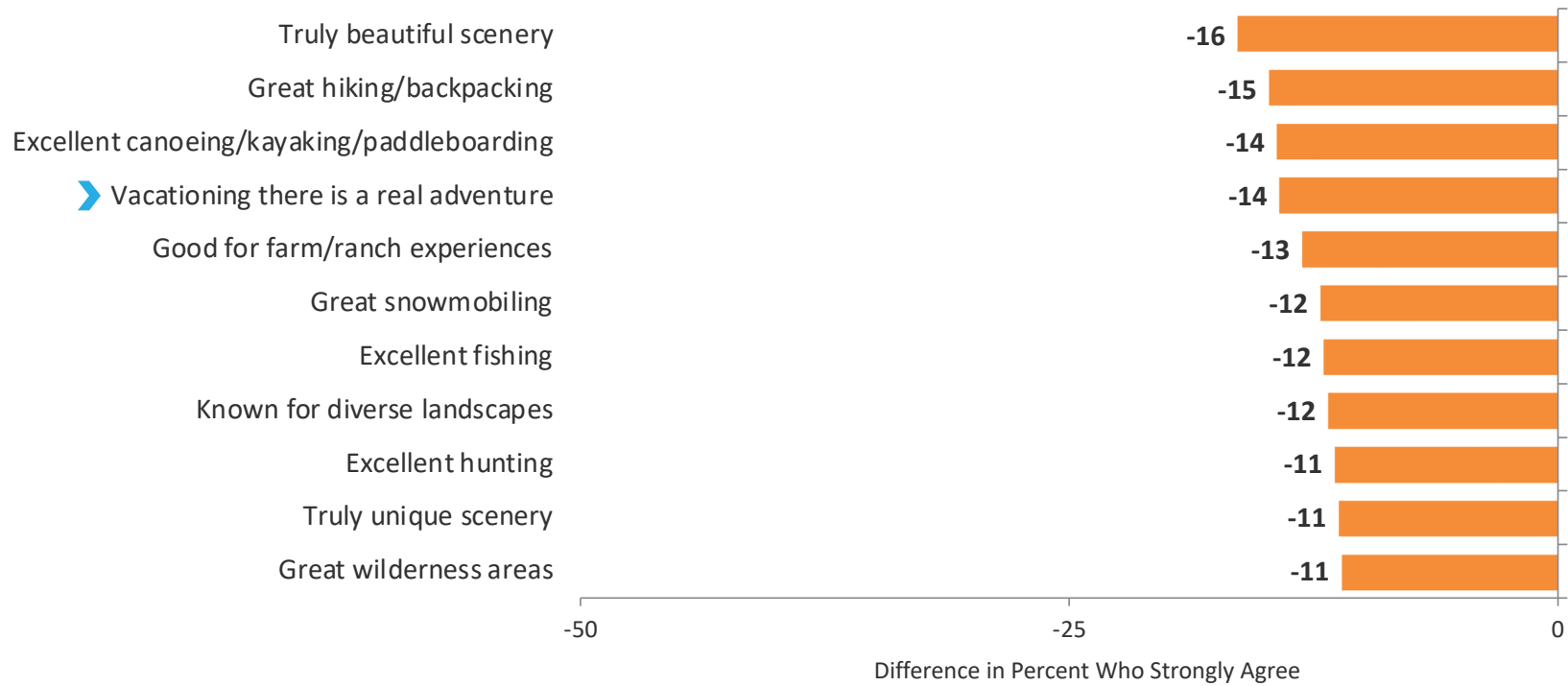
South Dakota's Image Strengths vs. Montana

Base: Residents of South Dakota's Regional Advertising Markets



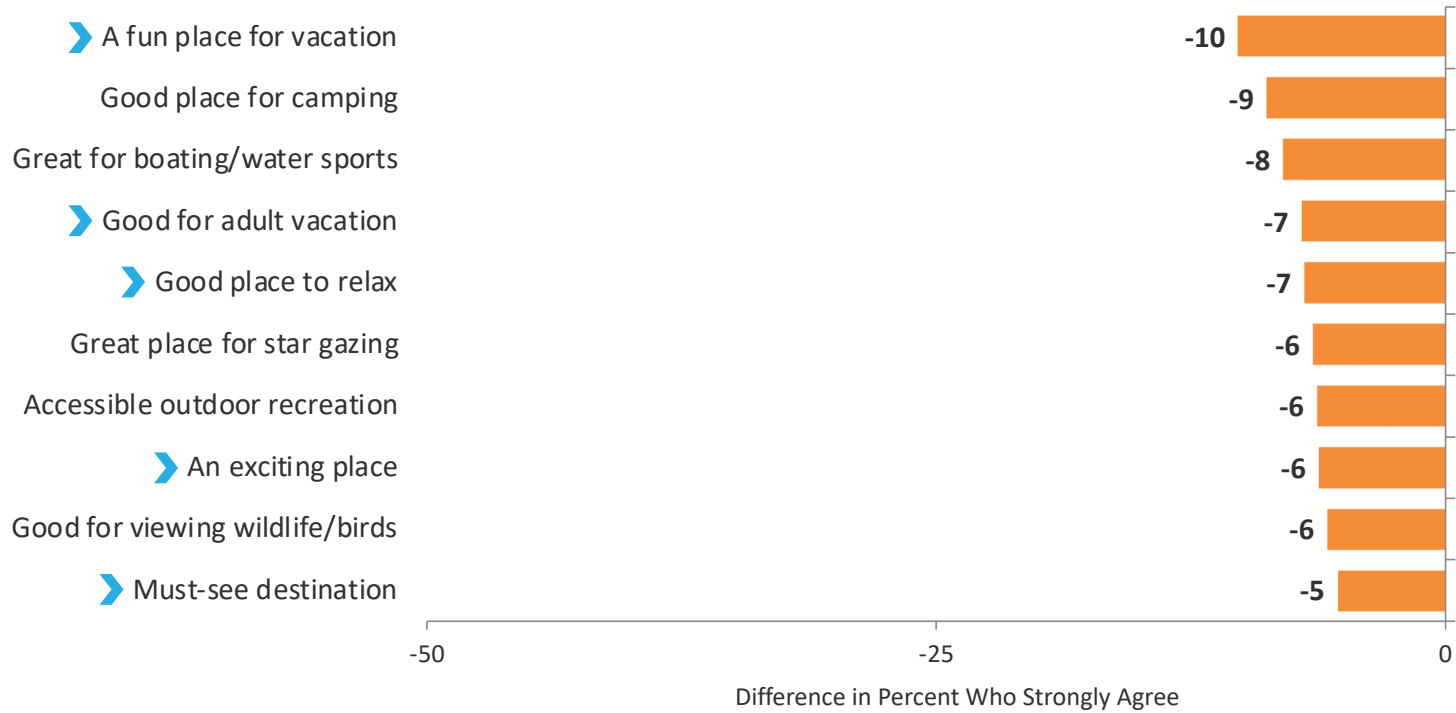
South Dakota's Image Weaknesses vs. Montana

Base: Residents of South Dakota's Regional Advertising Markets



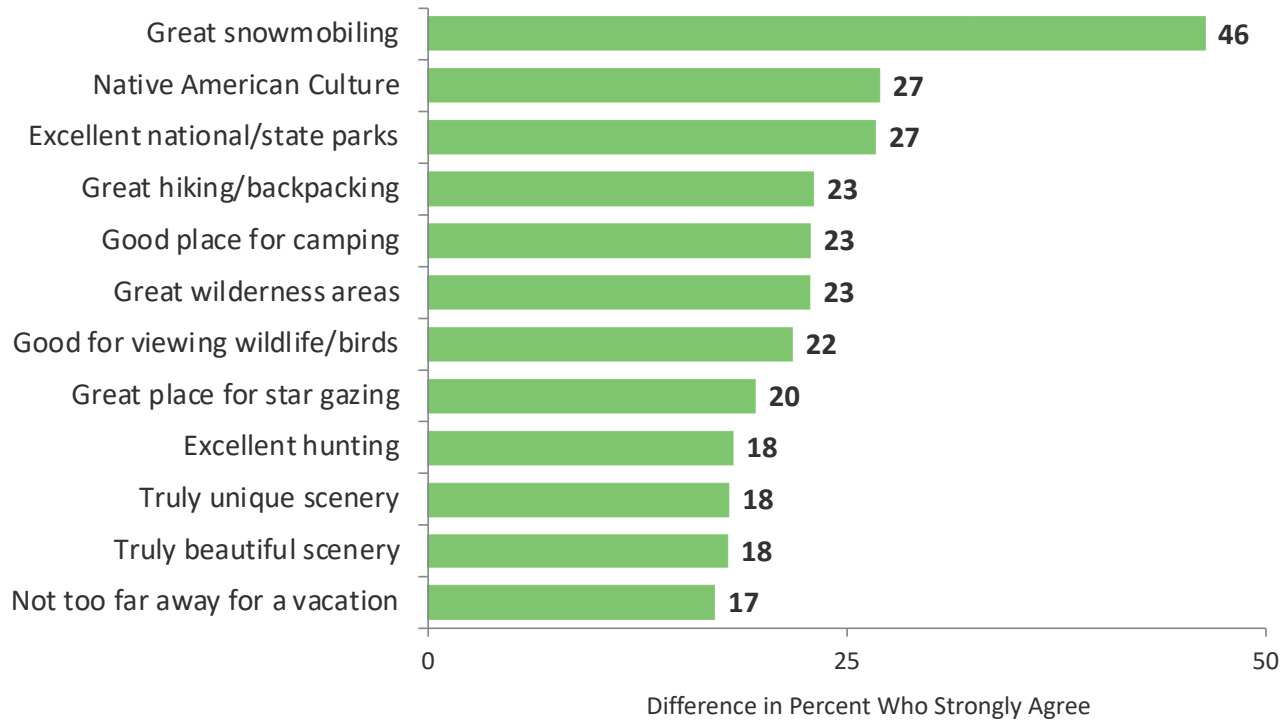
South Dakota's Image Weaknesses vs. Montana (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



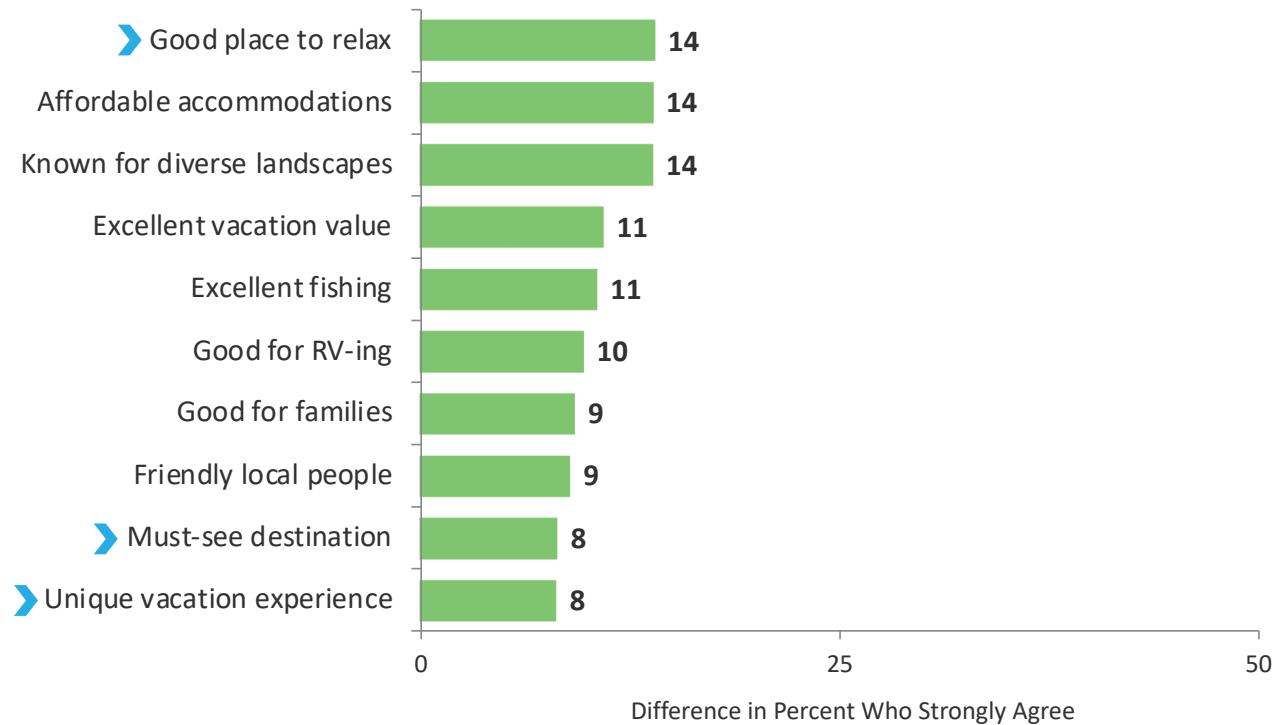
South Dakota's Image Strengths vs. Texas

Base: Residents of South Dakota's Regional Advertising Markets



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

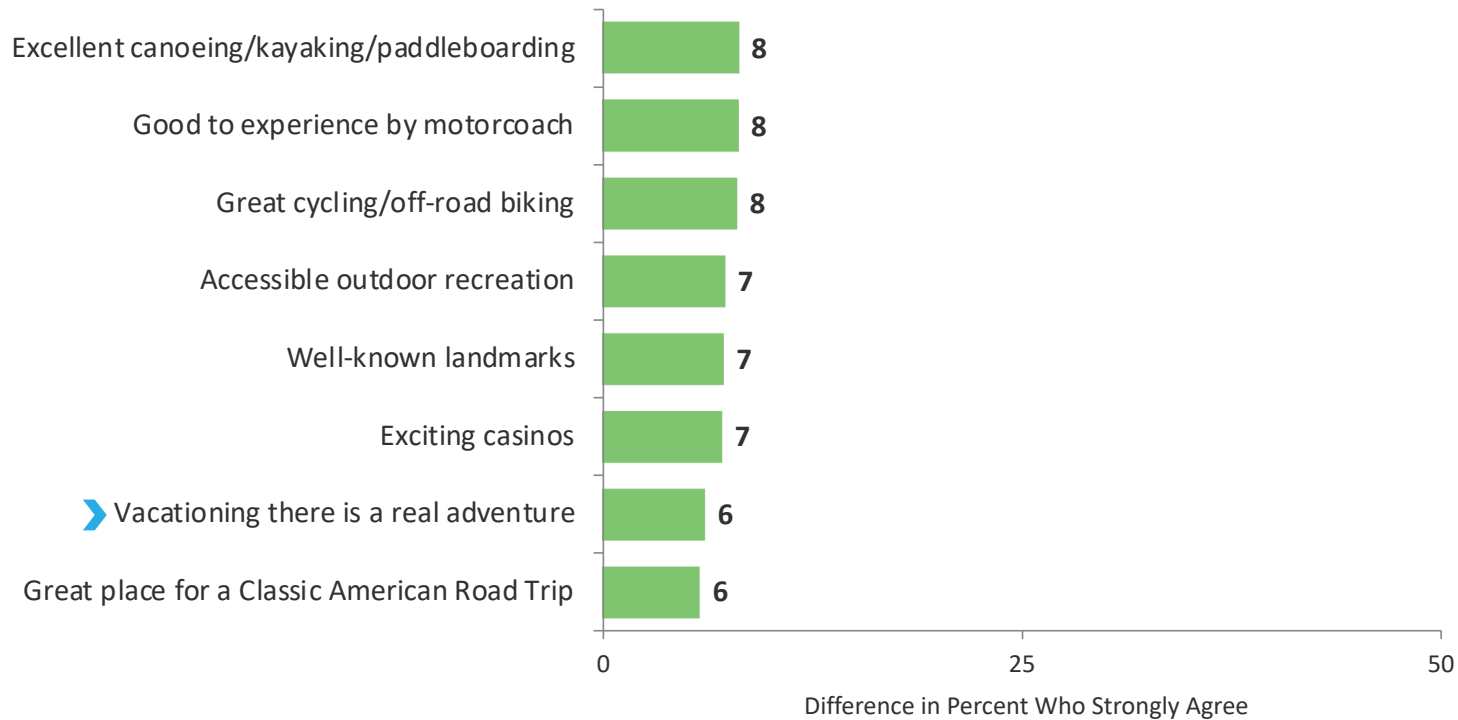
Base: Residents of South Dakota's Regional Advertising Markets



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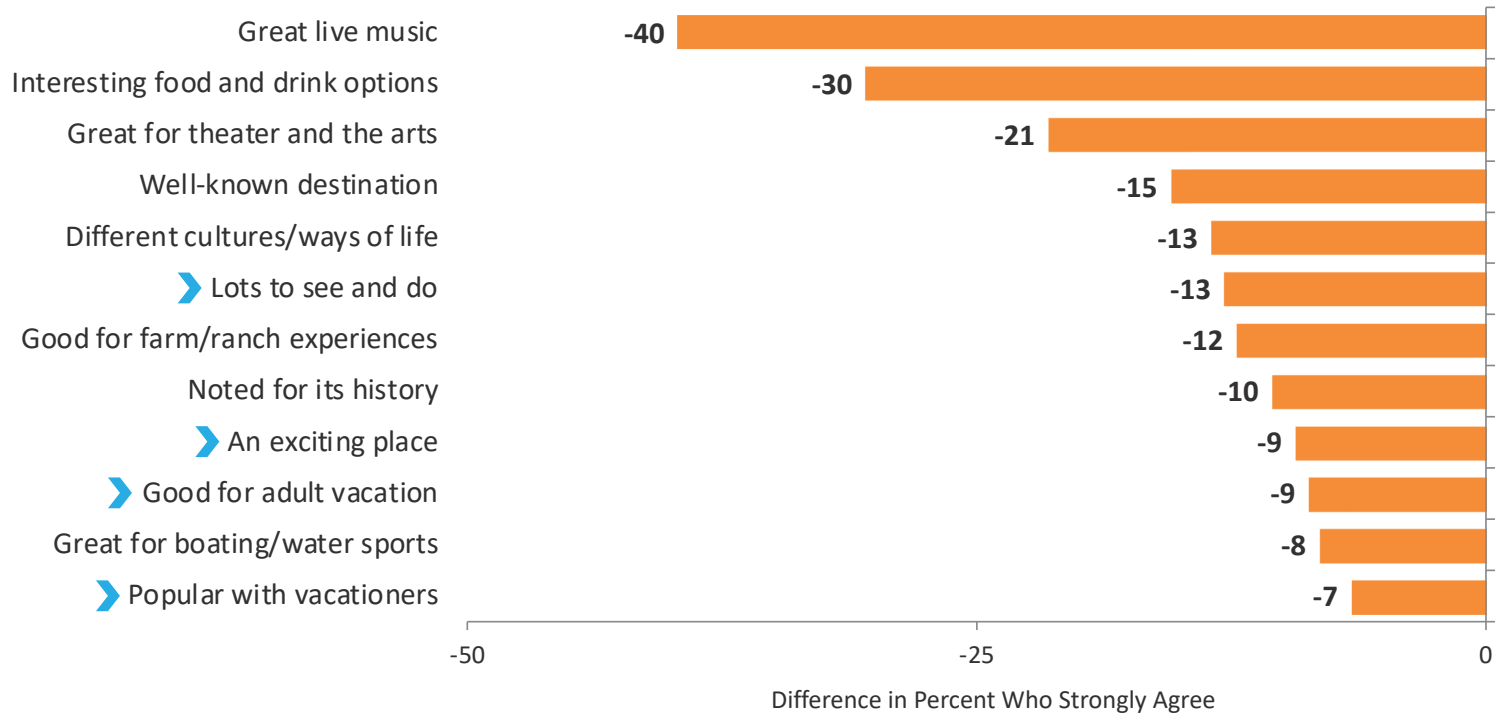
South Dakota's Image Strengths vs. Texas (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets



South Dakota's Image Weaknesses vs. Texas

Base: Residents of South Dakota's Regional Advertising Markets





South Dakota

**Appendix: South Dakota's
Image vs. Colorado**

Past Visitation

Base: Residents of South Dakota's Regional Advertising Markets

