South Dakota 2023
Advertising ROI/Image/Halo Research

TABLE OF CONTENTS

ABOUT LONGWOODS INTERNATIONAL

Established in 1978 as a market research consultancy, Longwoods International is a premier market research firm that is a respected leader within the travel and tourism industry. With offices in Toronto, Ohio, Indiana, Michigan, Florida, New York, North Carolina, Illinois and Wisconsin, Longwoods **conducts strategic market research** for public- and private-sector clients throughout North America, Europe and the Pacific Rim.

Longwoods is known for a multitude of destination marketing services, most notably:
➥**Overnight and day visitor profiles**, including visitor volumes and expenditures, through **Travel USA®**, the largest American domestic travel study, begun in 1990.
➥**Destination advertising awareness**, **return-on-investment of advertising campaigns**, and **measuring the impact of advertising on a destination's image** across a wide range of leisure travel attributes.
➔ **"Halo Effect"** of tourism advertising on a destination's image for broader economic development objectives.
➥**Resident sentiment research**, which investigates both practical and emerging concerns among residents in a destination regarding tourism, including topics such as economic development, perceived environmental impacts, overtourism, and residents' quality of life.
➥**Custom qualitative and quantitative research**

Soundly grounded in scientific principles, our research methodologies have been **peer-reviewed**, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists. Our **scientific integrity has been recognized** with numerous Best Practice awards, as well as invitations for speaking engagements across North America.
With the acquisition of Clarity of Place, Longwoods now also offers cutting-edge approaches to help destinations **evaluate the alignment of the needs of visitors with those of residents**, the community capacity for destination growth, the health of their brand image, and their ability to remain competitive.

Longwoods
INTERNATIONAL

Campaign Dates

April – October 2023

The campaign consisted of both traditional and online media including:
Print
TV (cable, streaming)
Digital (display, audio)
Social Media
Out-of-Home

PROJECT OVERVIEW

Longwoods was engaged to conduct a program of research designed to measure the ROI and advertising awareness of the South Dakota 2023 advertising campaign.

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 intentions to visit and image, and measure short-term conversion that occurred during and shortly after the campaign period.**

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.

Longwoods
INTERNATIONAL

SURVEY METHODOLOGY

Survey fielded in key advertising markets and received 1,600 qualified respondents.

Qualified respondents are adult travelers* and members of major online consumer research panel.

Sample drawn to be representative and proportionate to sample DMAs, age, and gender.

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.

Fieldwork was conducted in February 2024. Median length of survey was 19 minutes. For a sample of this size, the confidence level is + / –3, 19 times out of 20

Sample Markets + Respondent Distribution

Market	Respondents
Colorado	180
Illinois	370
Iowa	100
Minnesota	175
Missouri	190
Montana	35
Nebraska	60
North Dakota	30
Wisconsin	180
Wyoming	30
Dallas – Fort Worth DMA	250

*Adults 18 years of age or older who have taken at least one day or overnight leisure trip in the past 3 years and intend to take one in the next 2 years.

Longwoods
INTERNATIONAL

KEY FINDINGS: ADVERTISING

ADVERTISING

- Almost two-thirds (63%) of travelers in South Dakota's regional advertising markets recalled at least one advertisement from the 2023 campaign. This is statistically the same as last year.
  - Half (50%) recalled at least one digital ad, almost half (46%) one social media ad, and over four in ten (44%) recalled one out-of-home ad. Four in ten (38%) recalled at least TV ad, and three in ten (31%) one print advertisement.
  - Comparing this distribution of awareness over media types to the overall awareness, it's clear that travelers are seeing multiple ads across media types. This is the optimal delivery performance, because seeing South Dakota's messaging across media types reaffirms the brand, the state's desirability, and it works to convert travelers' interest into actual visitation.
- The most recalled ads (not included specific out-of-home placements) were:
  - Peak Family Video TV ad – 30%
  - Peak Couples Video TV ad – 29%
  - Native American Social Video social media ad – 29%
  - Badlands Social Video social media ad – 28%
  - Native American Video digital ad – 27%
  - Mount Rushmore Social Video social media ad – 25%
  - Native American Social Carousel social media ad – 24%
  - Native American Social Static social media ad – 24%
  - Paramount Compilation digital ad – 23%

Longwoods
INTERNATIONAL

RETURN ON INVESTMENT

- The 2023 campaign produced an additional 1 million trips to South Dakota, that otherwise would not have materialized in the absence of advertising.
  - This is over 300,000 more trips than 2022, but the ad investment in 2023 was $2.33 million more than the previous year.
- These incremental visitors spent an estimated $186.7 million while in South Dakota.
  - This is $73.9 million higher than 2022.
- When related to advertising costs of $4.2 million, this translates into a return on investment of $45 in visitor spending for each ad dollar spent.
  - This result is lower than 2022's result of $61, but 2023 had a significantly higher ad investment. Even though the return number is lower, the fact remains that this campaign led to almost $75 million more being spent in South Dakota by incremental visitors than in 2022.
- The incremental expenditures yielded $14 million in taxes, equating to a return on investment of $3 in taxes for each ad dollar spent.
  - The incremental taxes earned are $5.1 million more than 2022. So even though the 2023 tax ROI per ad dollar spent is lower than the 2022 result ($5), the increased ad investment of $2.33 million had a strong overall return in tax receipts for the state.

Longwoods
INTERNATIONAL

RETURN ON INVESTMENT

- South Dakota spent an average of $4.09 in advertising for every incremental trip earned from this campaign.
  - This is higher than 2022's $2.66. However, despite an increase in this metric, the increased ad investment in 2023 brought almost $75 million more in spending and over $5 million more in tax revenues than without that increased investment.
- Please note that in 2023, the Dallas/Fort Worth DMA was added to the regional advertising markets. This DMA represented 14% of travelers originating from South Dakota's regional advertising markets in 2023.

Longwoods
INTERNATIONAL

OVERALL IMAGE

- When travelers from South Dakota's regional advertising markets are deciding to visit the state or one of its regional competitors, the 10 most important individual attributes tied to destination selection are: A fun place for a vacation, Must-see destination, An exciting place, Vacationing there is a real adventure, Lots of things to see and do, Good for adult vacation, Unique vacation experience, Popular with vacationers, Great place for a Classic American Road Trip, and Truly beautiful scenery.
    - There are two changes in the Hot Buttons from 2022 – Children would enjoy and a Good place to relax have been replaced by Great place for a Classic American Road Trip, and Truly beautiful scenery.
- The 2023 campaign had a strong, positive impact on travelers' perceptions of South Dakota. Travelers in these regional markets exposed to the campaign gave the state higher rating scores than those unfamiliar with the campaign across all Travel Motivator categories. For the more detailed attributes, we find that the campaign did an exceptional job improving people's perceptions of South Dakota for almost every image dimension evaluated, including 9 out of 10 Hot Buttons.
- Comparing the image ratings of people who have never visited South Dakota versus that of those who have visited in the past two years, we have a measure of "product delivery," the relative satisfaction of the two groups. More travelers who visited the state from these regional advertising markets in the past two years gave South Dakota higher rating scores than those who have never visited across all Travel Motivator categories. From this analysis we find that South Dakota had no significant weaknesses in product delivery. More recent South Dakota visitors than non-visitors rated South Dakota more favorably across all 10 Hot Button attributes.

Longwoods
INTERNATIONAL

OVERALL IMAGE

- Relative to the other destinations in the competitive set for this study, South Dakota is quite competitive against most of the states included in this analysis. Across the markets surveyed, over half rated South Dakota very favorably as a destination they "would really enjoy visiting." South Dakota is ahead of North Dakota, tied with Minnesota and Texas, and behind Montana, Wyoming, and Wisconsin.
  - Please note that in 2022, 52% strongly agreed South Dakota is a place I'd really enjoy visiting, That is a statistical tie with this year's result.
  - South Dakota has 6 Image attribute strengths when compared it its competitive set, tied to history, culture, and the outdoors.
  - However, there are 6 Image attributes where South Dakota lags the competitive set, around outdoors and urban-associated attributes. Encouragingly, none of these are Hot Buttons.
- In every case, South Dakota's tourism advertising and subsequent visitation significantly improved the image of South Dakota for a wide range of economic development objectives among out-of-state travelers within South Dakota's regional markets, including a good place to live, work, retire, and work remotely.

Longwoods
INTERNATIONAL

Longwoods INTERNATIONAL

[ADVERTISING AWARENESS]

SouthDakota

AWARENESS* OF THE AD CAMPAIGN

Base: Residents of South Dakota's Regional Advertising Markets
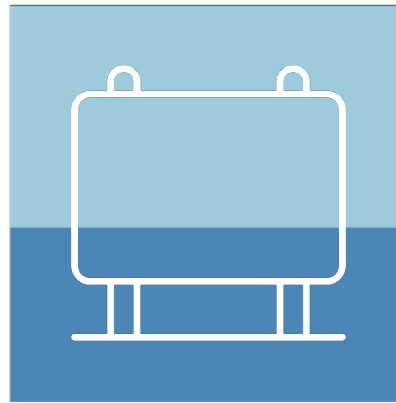
63% Aware of Any Ad
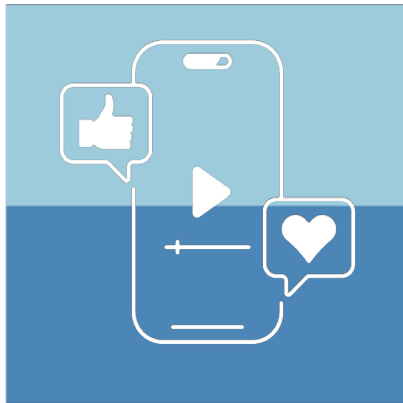
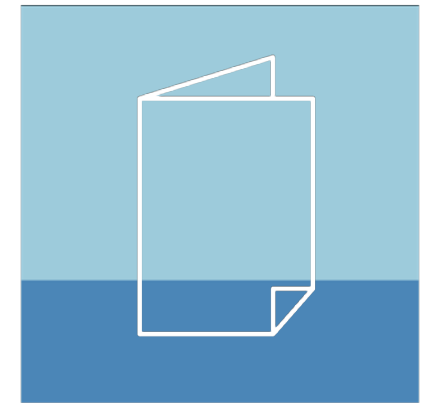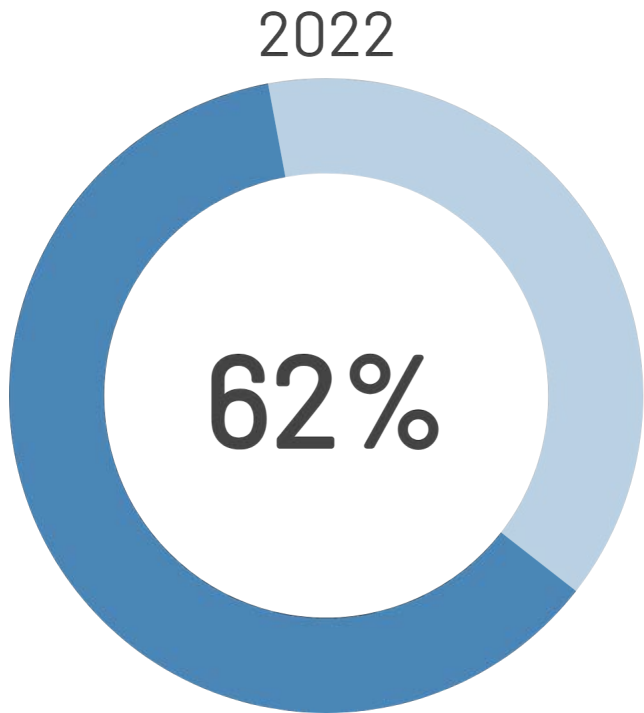| DIGITAL AWARE	SOCIAL MEDIA AWARE	OUT-OF-HOME AWARE	TV AWARE	PRINT AWARE
50%	46%	44%	38%	31%
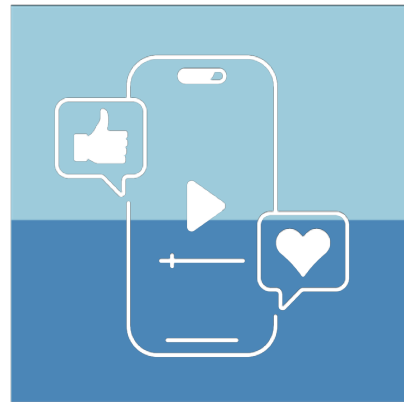
*Saw at least one ad and based on markets where shown

Longwoods
INTERNATIONAL

AWARENESS* COMPARISONS

Base: Residents of South Dakota's Regional Advertising Markets

2022

62%

2023

63%

*Saw at least one ad and based on markets where shown

Longwoods
INTERNATIONAL
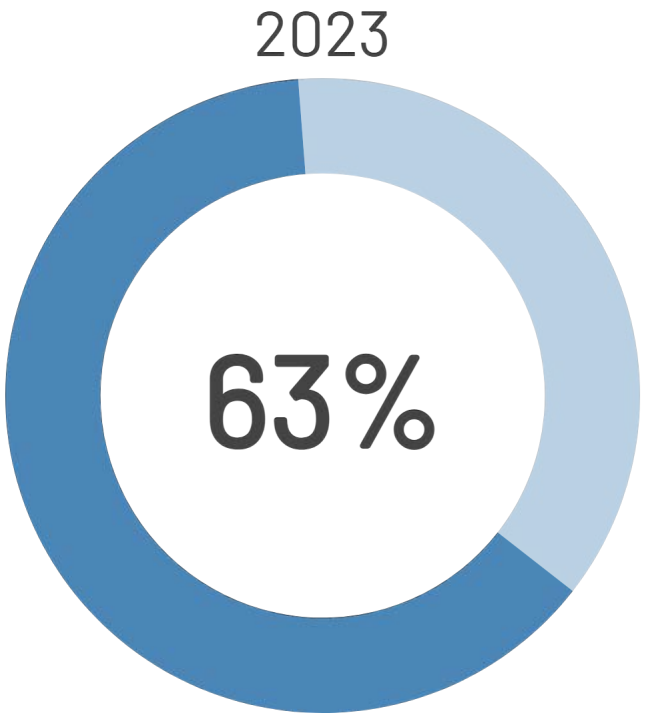
DIGITAL ADVERTISING CREATIVE

Native American Tribe Compilation

Native American Buffalo Compilation
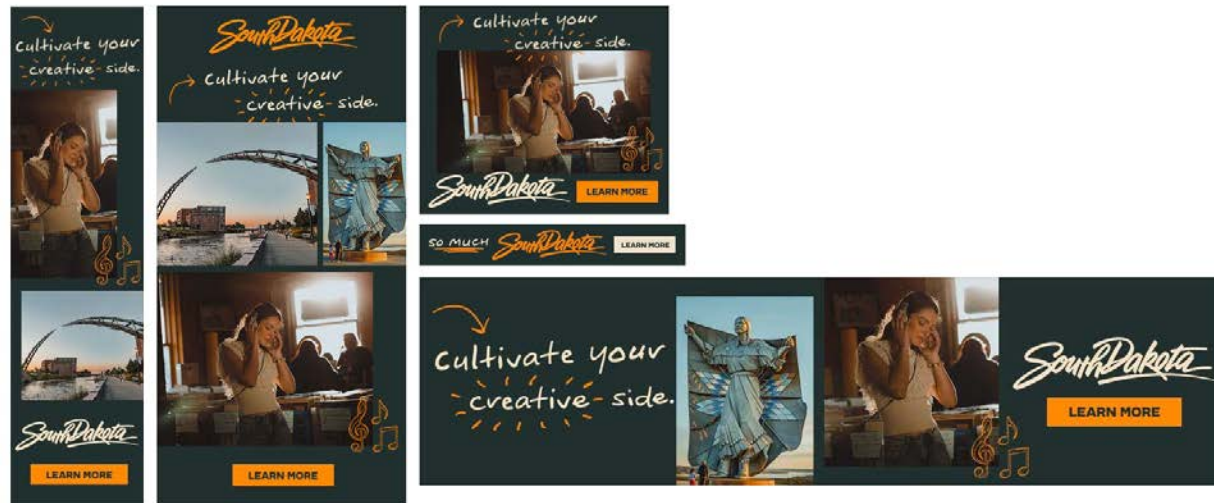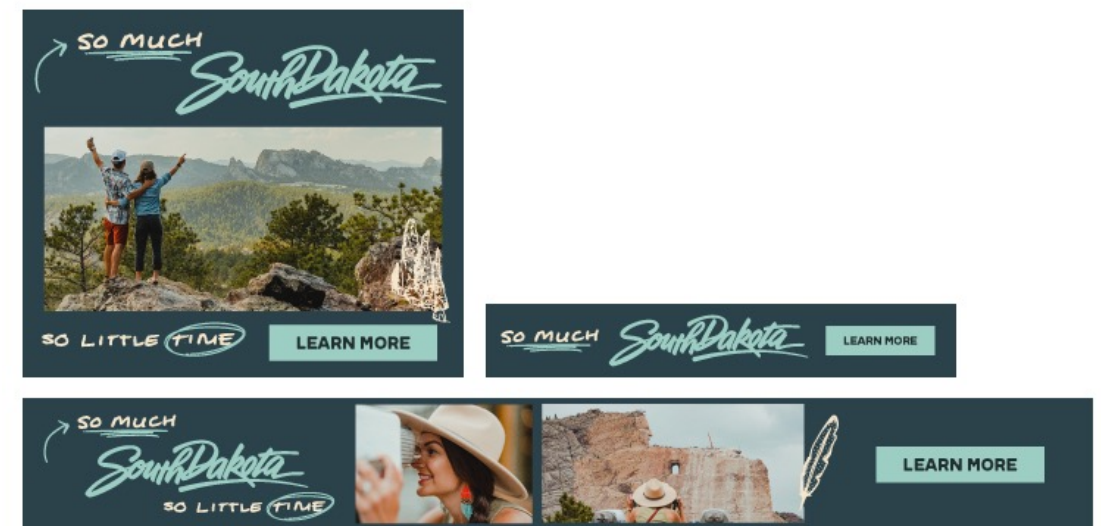
Music Compilation

Art Compilation

Wildlife Compilation

Outdoors Compilation
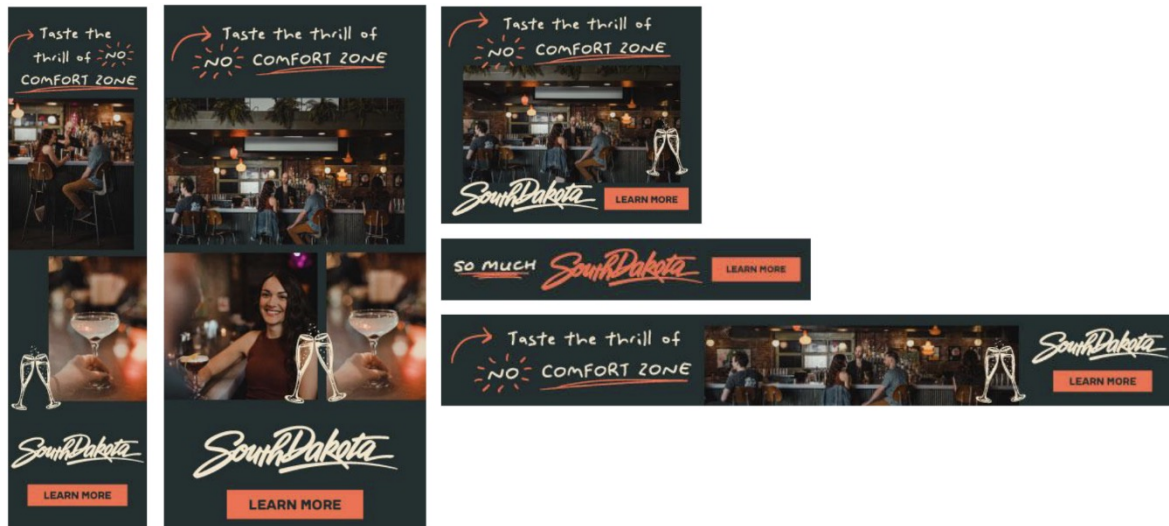
Dining Compilation

Paramount Compilation

AWARENESS* OF DIGITAL ADS

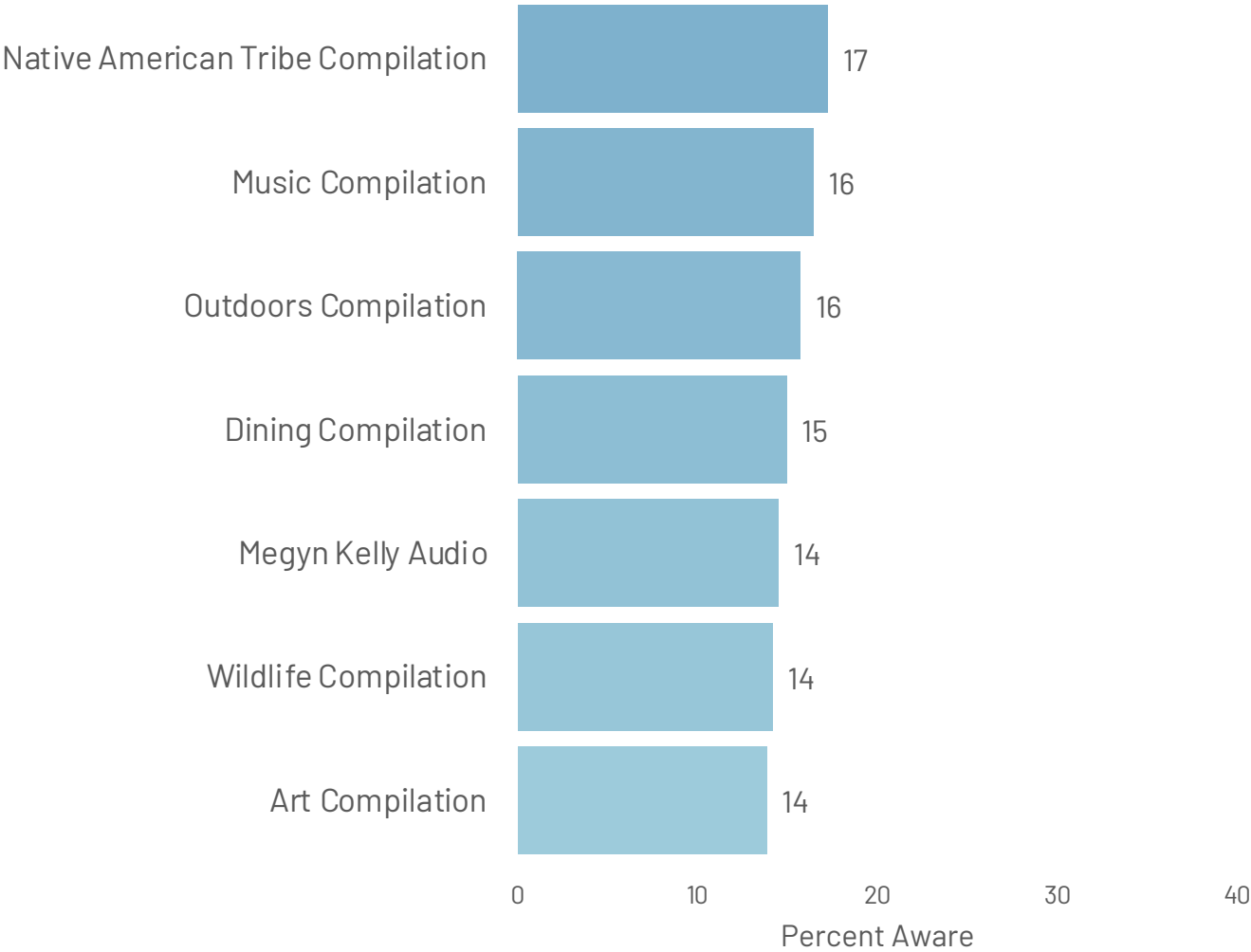Base: Residents of South Dakota's Regional Advertising Markets

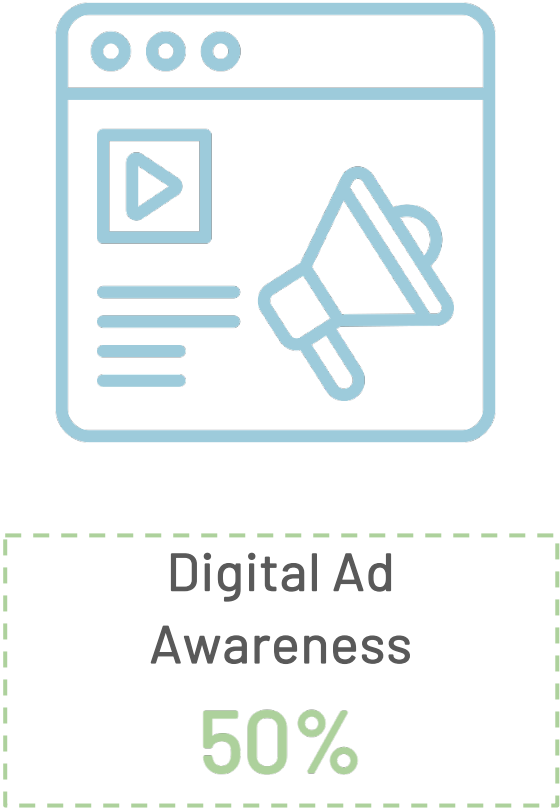**Digital Ad Awareness**

50%

Ad	Percent Aware
Native American Video	27
Paramount Compilation	23
Native American Buffalo Compilation	22
Unplug Audio	20
Arts and Culture Video	20
Explore Audio	20
SD General Audio	18
Rachel Hollis Audio	17

Percent Aware

*Saw at least one ad and based on markets where shown

Longwoods INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

Digital Ad Awareness

50%

	Percent Aware
Native American Tribe Compilation	17
Music Compilation	16
Outdoors Compilation	16
Dining Compilation	15
Megyn Kelly Audio	14
Wildlife Compilation	14
Art Compilation	14

*Saw at least one ad and based on markets where shown

Longwoods INTERNATIONAL

SOCIAL MEDIA ADVERTISING CREATIVE

Native American Social Static

Native American Social Carousel Compilation

Peak Social Carousel Compilation

Peak Social Static Compilation

Pinterest Carousel Compilation
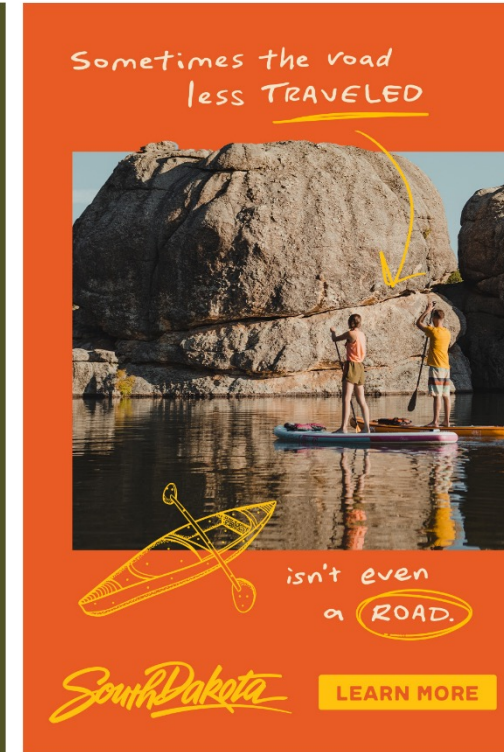
Pinterest Static Compilation

OUT-OF-HOME ADVERTISING CREATIVE

Dallas Bus Wraps

MSP Bus Wrap

Mayo Clinic OOH Compilation 1

Mayo Clinic OOH Compilation 2

Minnesota OOH

Denver OOH Compilation 1

Denver OOH Compilation 2

OOH 1

OOH 2

OOH 3

MSP Airport

OOH 4
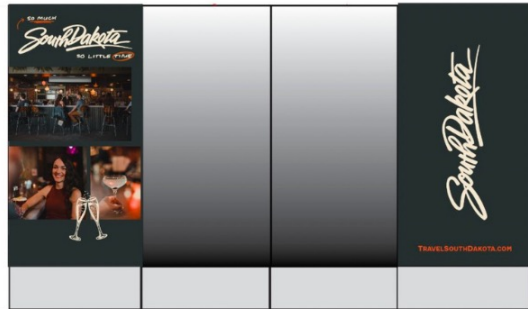
Denver Airport 1

Denver Airport 2
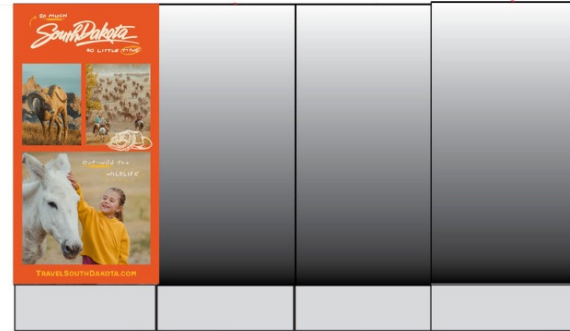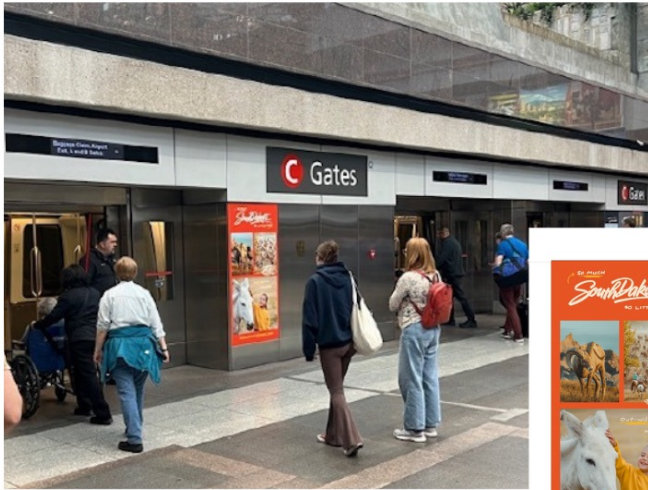
Denver Airport 3
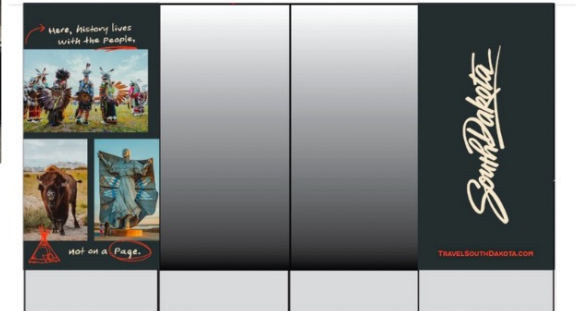
Denver Airport 4

Denver Airport 5

AWARENESS* OF OUT-OF-HOME ADS (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets

Out-of-Home Ad Awareness

44%

Ad	Percent Aware
Denver Airport 5	23
Denver Airport 4	22
Denver Airport 3	22
Denver OOH Compilation 2	21
Dallas Bus Wraps	21
MSP Bus Wrap	21
OOH 3	19
Denver Airport 2	18

Percent Aware

*Saw at least one ad and based on markets where shown

Longwoods INTERNATIONAL
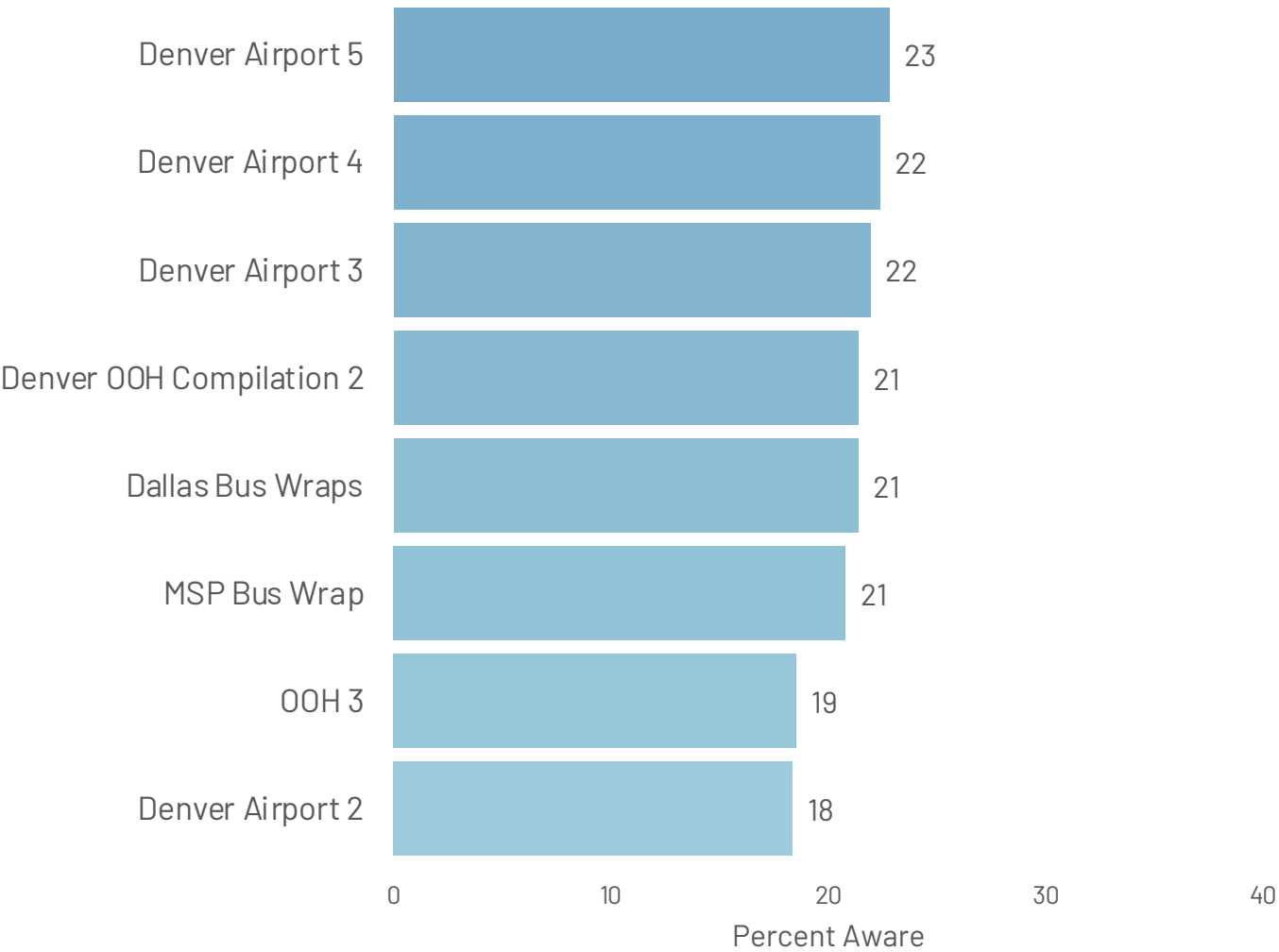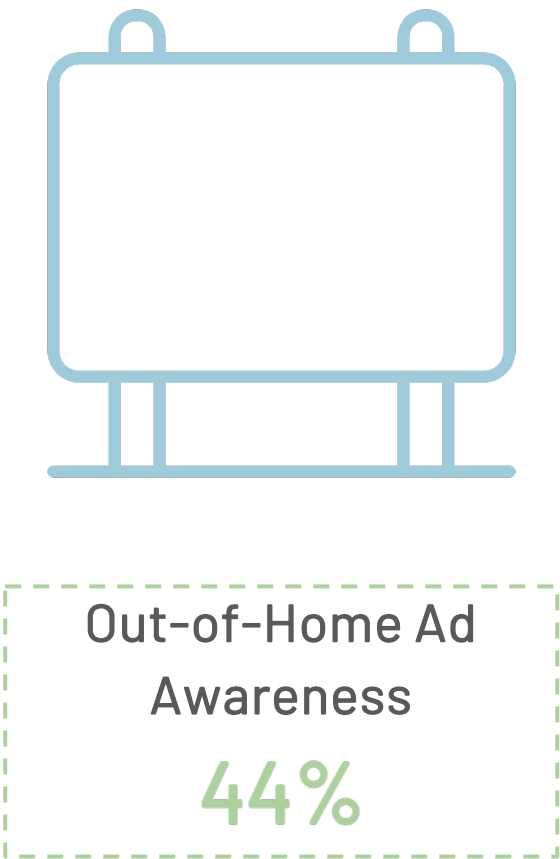
AWARENESS* OF TV ADS

Base: Residents of South Dakota's Regional Advertising Markets

TV Ad**
Awareness
38%

Peak Family Video — 30

Peak Couples Video — 29

Percent Aware

0   10   20   30   40
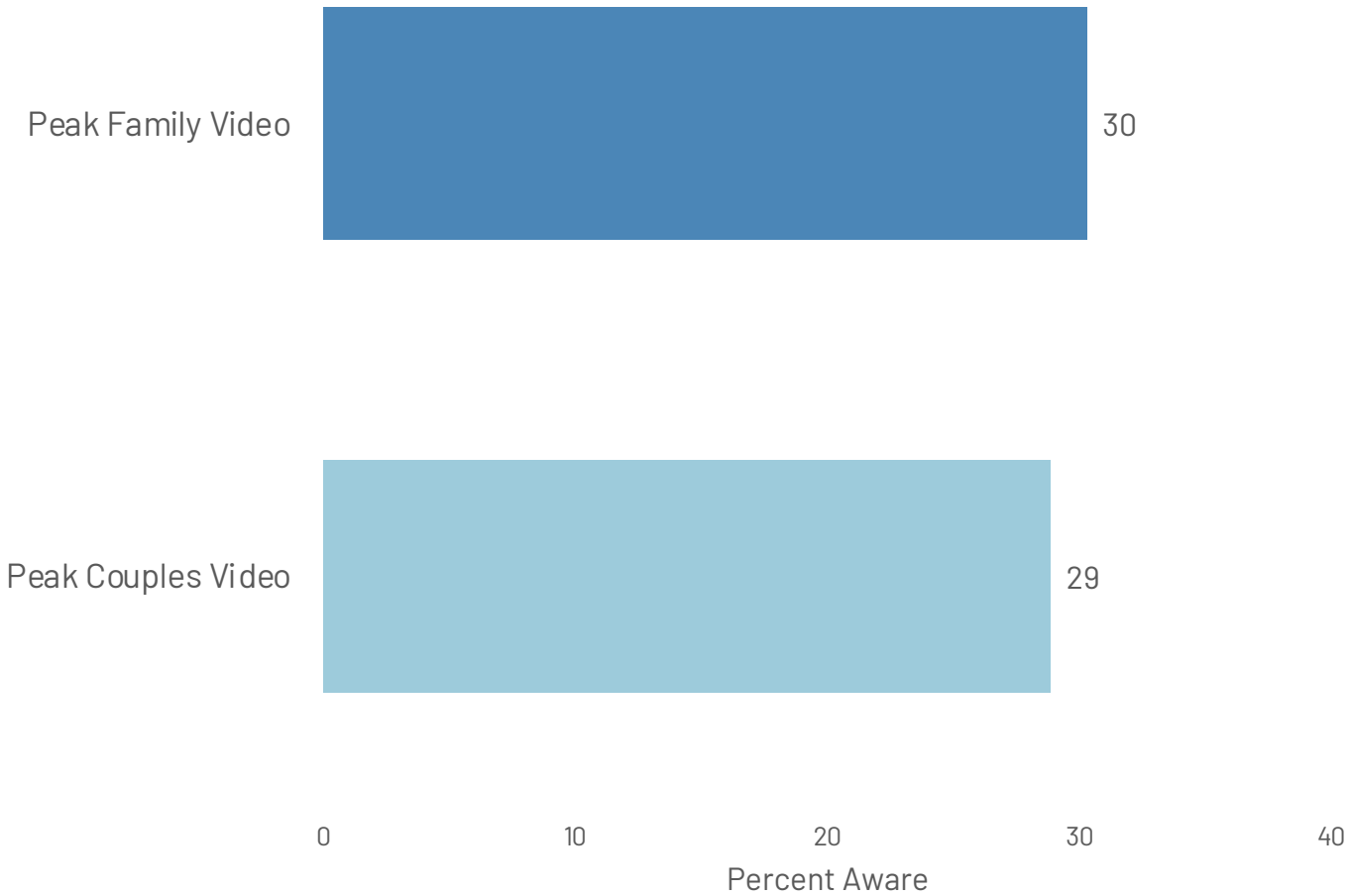
*Saw at least one ad and based on markets where shown
**Cable and streaming

Longwoods
INTERNATIONAL

PRINT ADVERTISING CREATIVE

Outside Print 1

National Geographic Print

Outside Print 2

AWARENESS* OF PRINT ADS

Base: Residents of South Dakota's Regional Advertising Markets
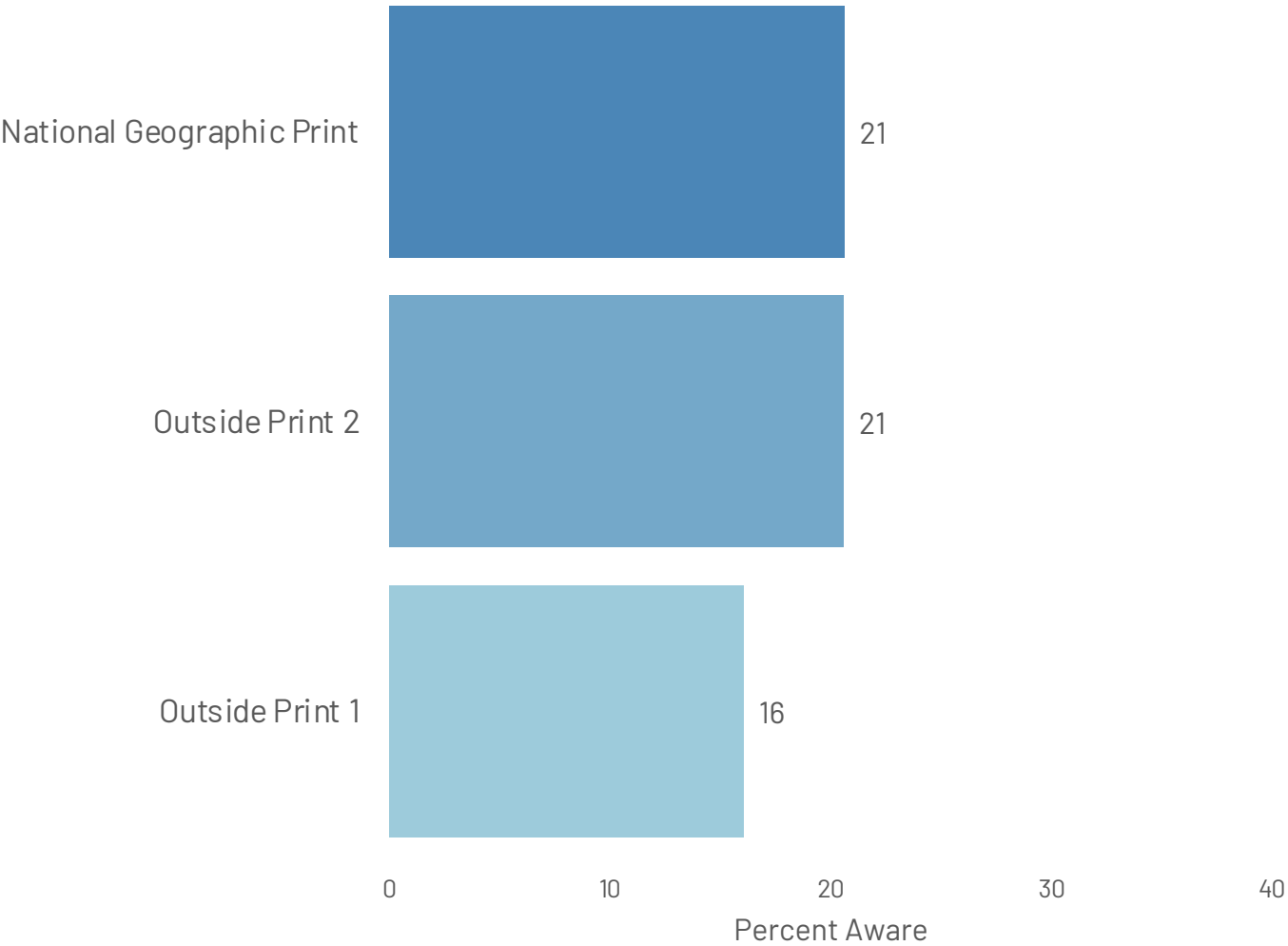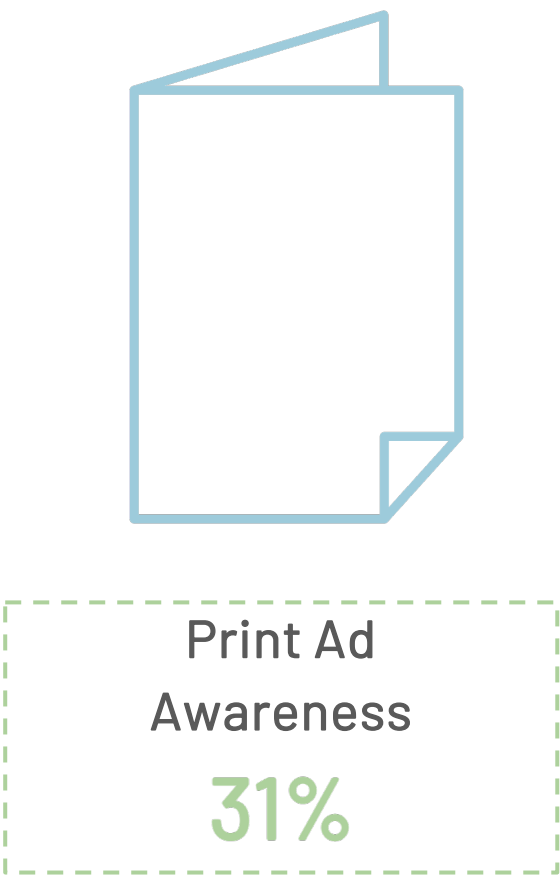
Print Ad
Awareness

31%

National Geographic Print — 21

Outside Print 2 — 21

Outside Print 1 — 16

Percent Aware

*Saw at least one ad and based on markets where shown

Longwoods
INTERNATIONAL
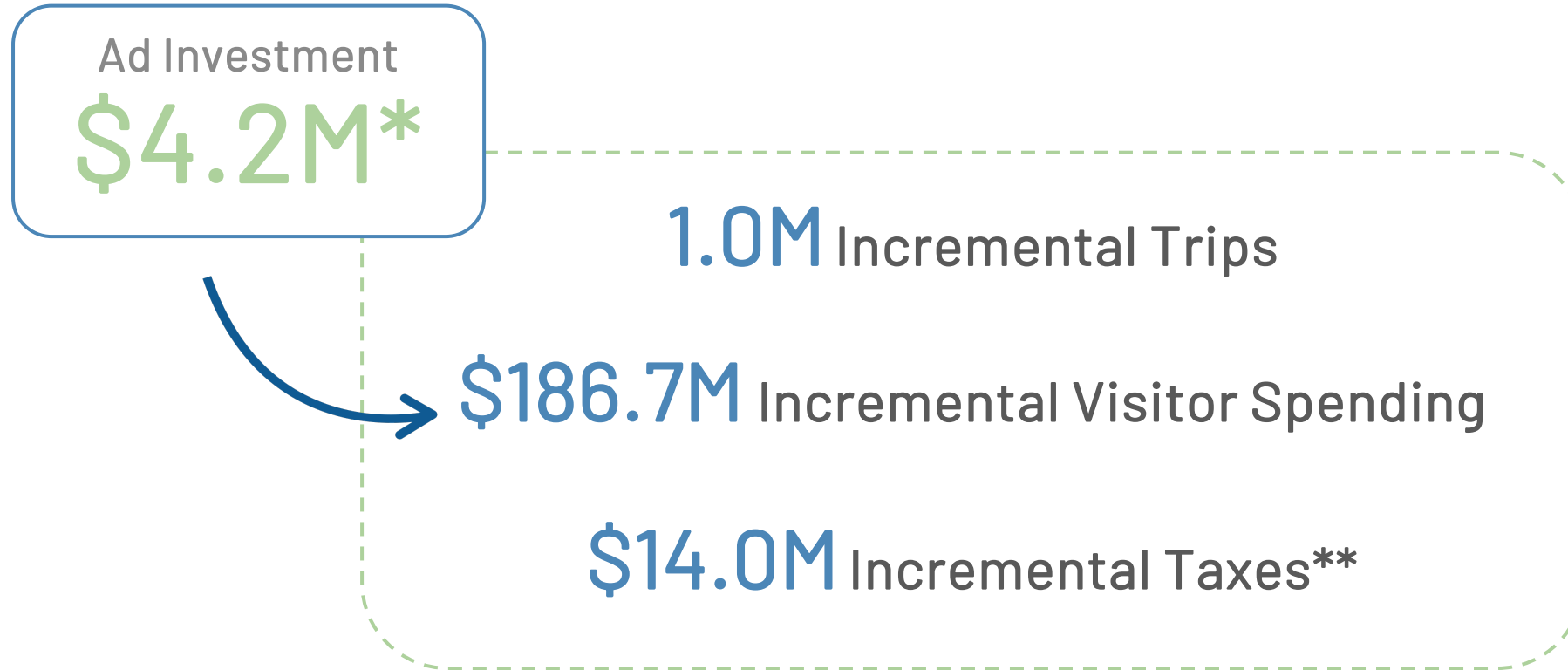
Base: Residents of South Dakota's Regional Advertising Markets

AD INVESTMENT CONVERSION

Each incremental trip earned by the
2023 Travel South Dakota campaign cost $4.09.

CAMPAIGN EFFICIENCY

Ad $'s Per Trip: $4.09

Trips Per Ad $: 0.2

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

$4.2M*
in advertising investment

$45 Spending ROI

$3 Tax ROI**

Every $1 invested in the 2023 South Dakota advertising campaign generated $45 in direct visitor spending and $3 in taxes in the state.

*Ad investment includes production costs
**Effective Tax Rate 7.5%

Longwoods
INTERNATIONAL
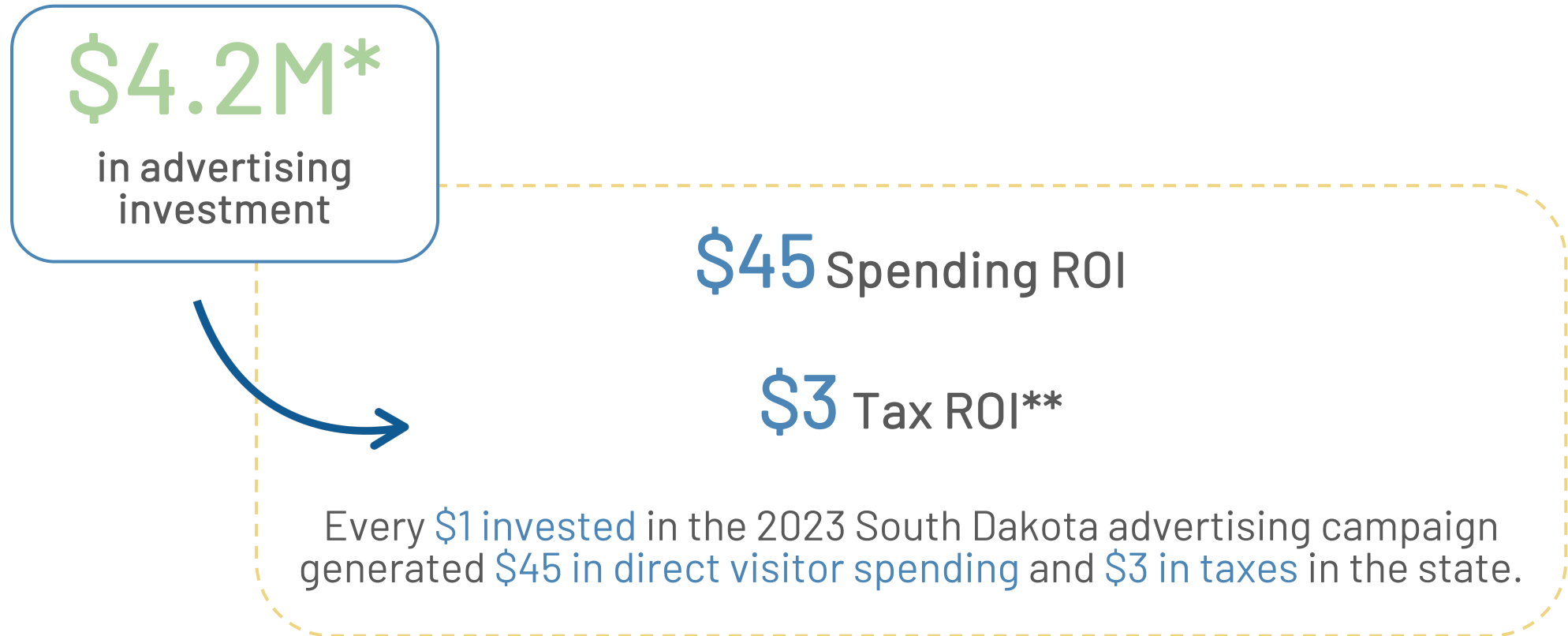
RETURN ON INVESTMENT COMPARISONS

Base: Residents of South Dakota's Regional Advertising Markets

	2022	2023
Ad Investment*	$1.8M	$4.2M
Incremental Trips	692K	1.0M
Incremental Visitor Spending	$112.8M	$186.7M
Incremental Taxes	$8.9M	$14.0M**
Spending ROI	$61	$45
Tax ROI	$5	$3
Ad $'s per Trip	$2.66	$4.09
Trips per Ad $	0.4	0.2

*Ad investment includes production costs
**Effective Tax Rate 7.5%

Longwoods
INTERNATIONAL

Longwoods
INTERNATIONAL

[
DESTINATION VISITATION
& INTEREST
]

SouthDakota

PAST VISITATION

Base: Residents of South Dakota's Regional Advertising Markets

38% of travelers within South Dakota's regional advertising markets have visited the state during their lifetime. Among those, 38% have visited during the past 2 years.

	Ever Visited	Visited in Past 2 Years*
Wisconsin	53%	63%
Minnesota	48%	57%
Texas	54%	53%
Wyoming	30%	38%
South Dakota	38%	38%
Montana	26%	37%
North Dakota	25%	35%

*Among those who have ever visited respective destination

Longwoods INTERNATIONAL

INTENT TO VISIT IN NEXT 12 MONTHS

Base: Residents of South Dakota's Regional Advertising Markets

	Probably or Definitely Will Visit Destination in Next 12 Months*
Wisconsin	51%
Texas	43%
Minnesota	39%
Montana	31%
Wyoming	30%
South Dakota	29%
North Dakota	27%

29% of respondents intend to visit South Dakota during the next 12 months.

*On a day or overnight leisure trip

Longwoods INTERNATIONAL

WHAT IS A TRAVEL MOTIVATOR?

Respondents evaluated the image of South Dakota and six other destinations on an overall basis and on a series of detailed image attributes.

Similar image attributes are grouped together to form Travel Motivators.

Travel motivators are ranked in descending order based on the average correlation* value for their respective individual attributes.

Travel Motivators in this Study

Exciting

Adult Vacation

Unique

Family Atmosphere

Welcoming

Popular

Sightseeing

Sports and Recreation

Entertainment

Affordable

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

Longwoods
INTERNATIONAL

TRAVEL MOTIVATOR GROUPINGS

Exciting
A fun place for vacation
Must-see destination
An exciting place
Vacationing there is a real adventure

Adult Vacation
Good for adult vacation

Unique
Unique vacation experience

Family Atmosphere
Good for families
Children would enjoy

Welcoming
Good place to relax
Is known for being welcoming
Friendly local people

Popular
Popular with vacationers
Well-known destination
I often notice advertising for this place

Sightseeing
Lots to see and do
Great place for a Classic American Road Trip
Truly beautiful scenery
Truly unique scenery
Known for diverse landscapes
Good for viewing wildlife/birds
Excellent national/state parks
Authentic historical sites
Well-known landmarks
Noted for its history
Good for RV-ing
Great wilderness areas
Good to experience by motorcoach
Great place for stargazing
Different cultures/ways of life
Good for farm/ranch experiences
Native American Culture

Sports and Recreation
Good place for camping
Outdoor recreation activities for all skill levels
Great hiking/backpacking
Excellent canoeing/kayaking/paddleboarding
Great cycling/off-road biking
Excellent fishing
Great for boating/water sports
Excellent hunting
Great snowmobiling

Entertainment
Interesting food and drink options
Great live music
Great for theater and the arts
Exciting casinos

Affordable
Excellent vacation value for the money
Affordable accommodations
Not too far away for a vacation

Longwoods
INTERNATIONAL

TRAVEL MOTIVATORS

South Dakota's Travel Motivators

For a destination in South Dakota's primary markets to get on travelers' consideration list, it must, first and foremost, be perceived to be exciting, great for an adult vacation, and unique.

Other factors of moderate importance include having a family atmosphere, being welcoming and popular, and having sightseeing options.

Lower priorities when selecting the destination are sports and recreation and entertainment offerings, and affordability.

Motivator	R Squared Value
Exciting	0.50
Adult Vacation	0.43
Unique	0.42
Family Atmosphere	0.38
Welcoming	0.34
Popular	0.32
Sightseeing	0.28
Sports and Recreation	0.25
Entertainment	0.25
Affordable	0.21

R Squared Value
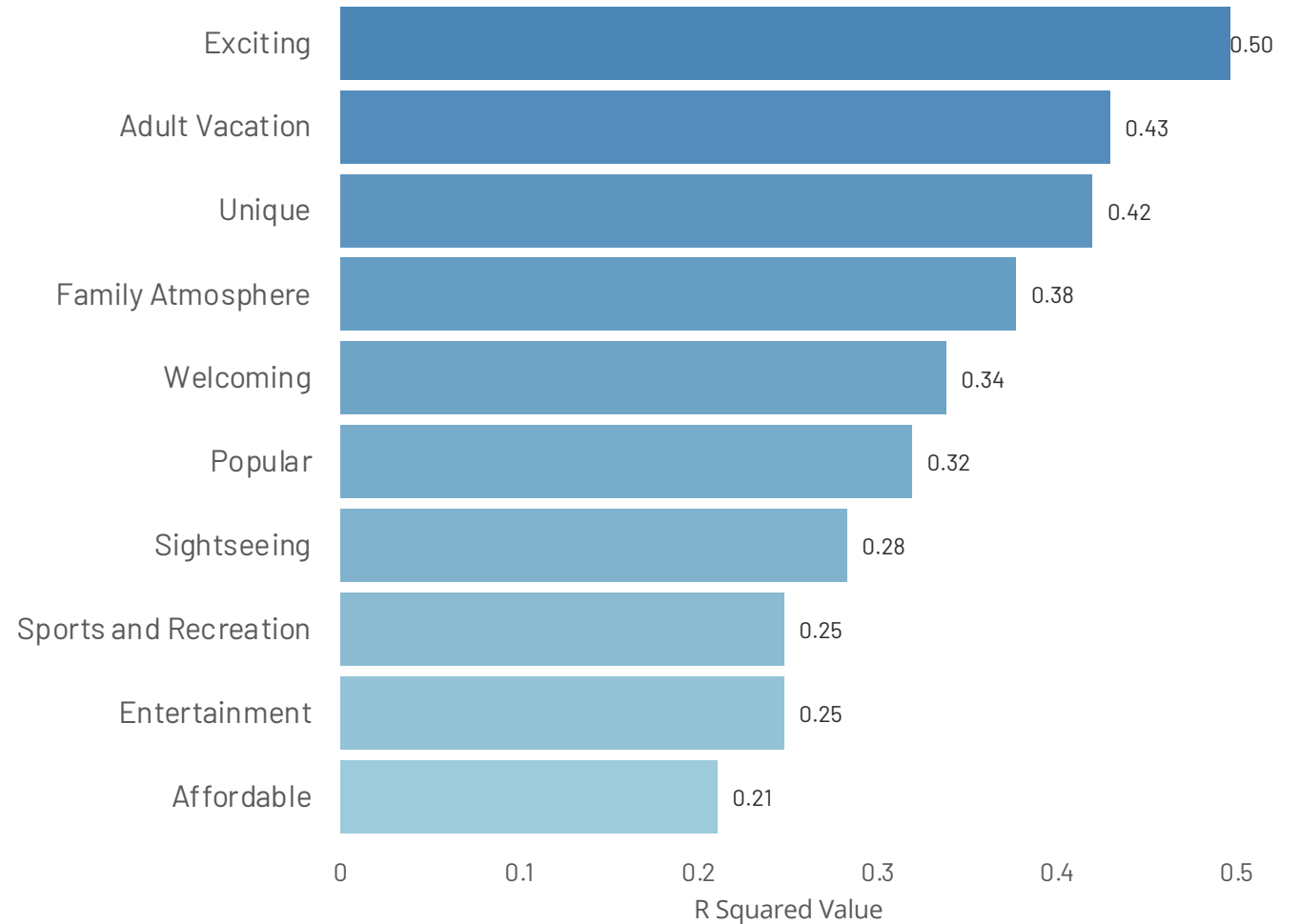
*Correlations are a measure of the degree of association between each factor and whether destination is a place "I'd really enjoy visiting."

Longwoods INTERNATIONAL

HOT BUTTONS

Hot Buttons are the ten individual image attributes most closely tied to destination selection in South Dakota's regional markets.*

Hot buttons are high on a traveler's 'wish list' when selecting a destination they'd really enjoy visiting.

HOT BUTTONS

A fun place for vacation

Must-see destination

An exciting place

Vacationing there is a real adventure

Lots to see and do

Good for adult vacation

Unique vacation experience

Popular with vacationers

Great place for a Classic American Road Trip

Truly beautiful scenery

*Based on strongest correlation value to "A place I'd really enjoy visiting"

Longwoods
INTERNATIONAL

Longwoods
INTERNATIONAL

[IMAGE: 2023 VS. 2022]

SouthDakota

OVERALL IMAGE: 2023 VS. 2022

Base: Residents of South Dakota's Regional Advertising Markets
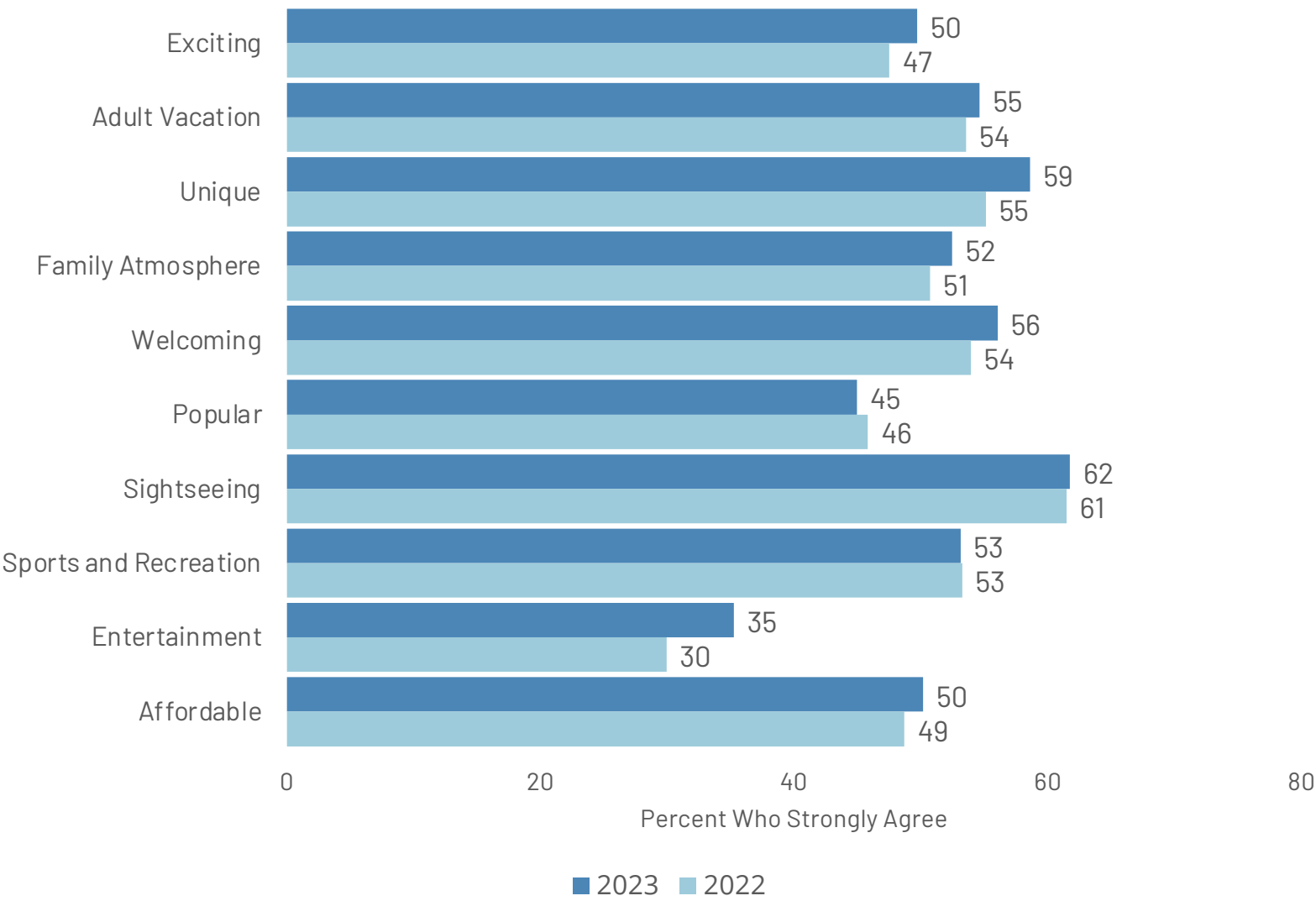
Attribute	2023	2022
Exciting	50	47
Adult Vacation	55	54
Unique	59	55
Family Atmosphere	52	51
Welcoming	56	54
Popular	45	46
Sightseeing	62	61
Sports and Recreation	53	53
Entertainment	35	30
Affordable	50	49

Percent Who Strongly Agree

■ 2023 ■ 2022

Longwoods
INTERNATIONAL
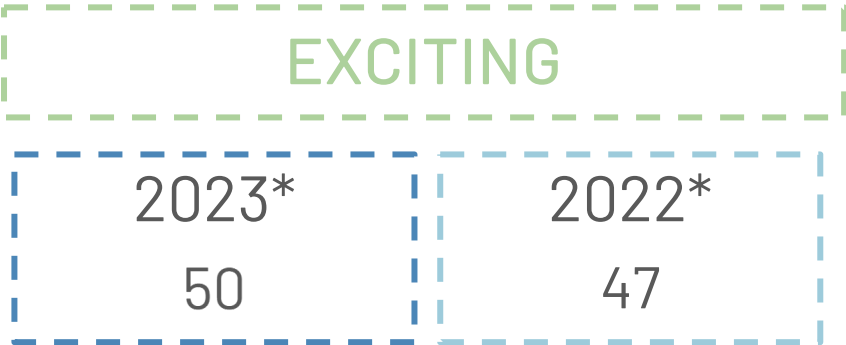
Base: Residents of South Dakota's Regional Advertising Markets
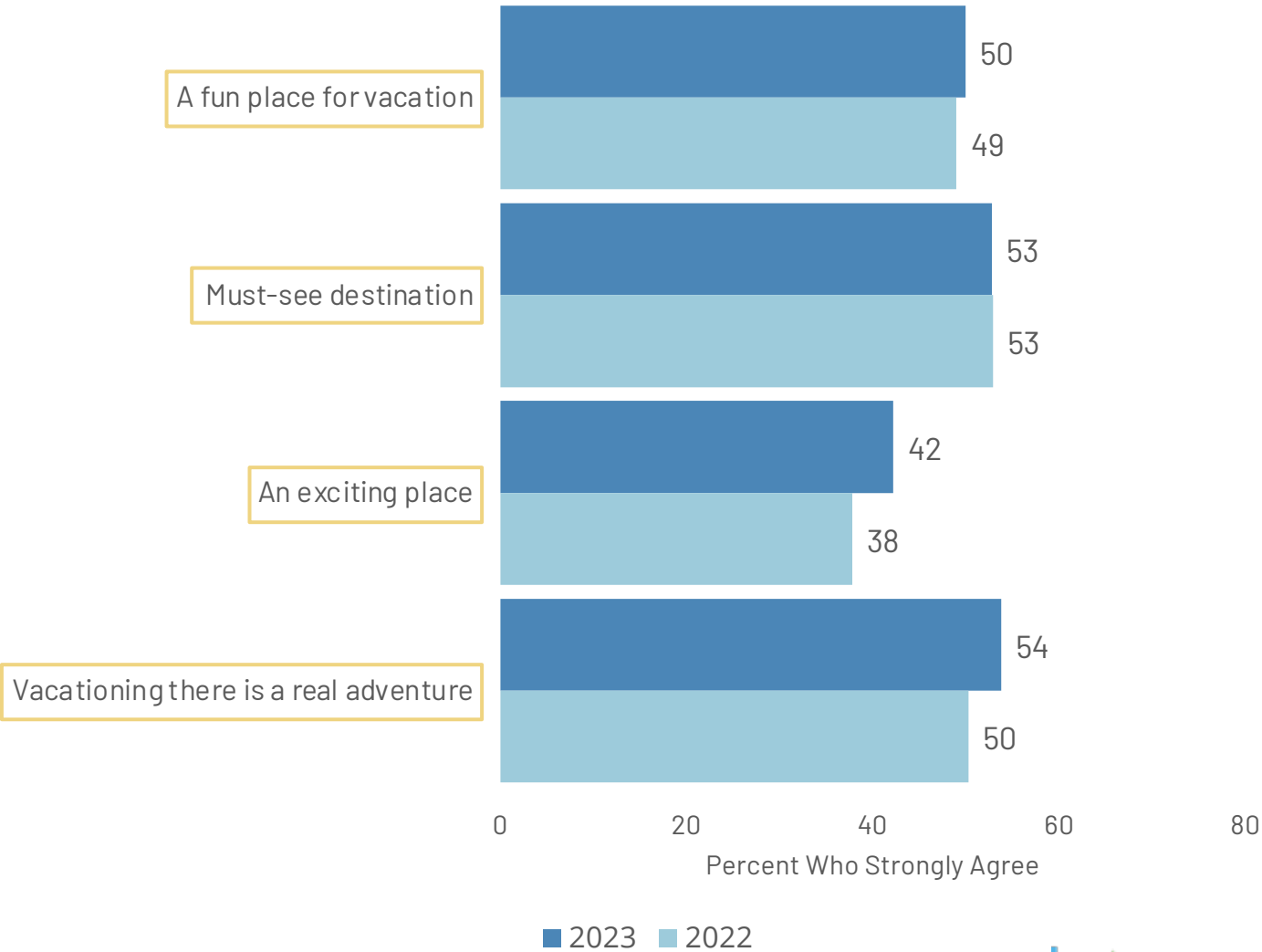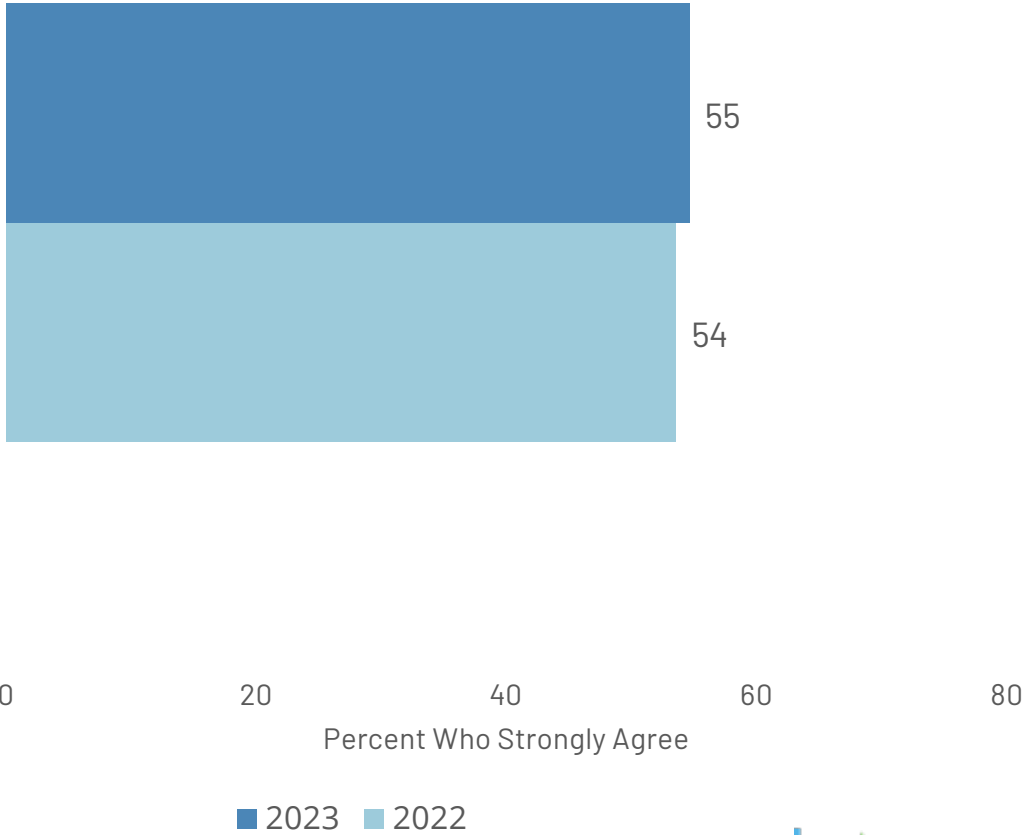
ADULT VACATION

2023*	2022*
55	54

Good for adult vacation

55

54

Percent Who Strongly Agree

■ 2023 ■ 2022

Hot Button

*Percent who strongly agree

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets
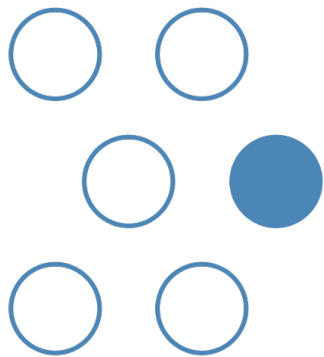
UNIQUE

2023*	2022*
59	55

Unique vacation experience

59

55

Percent Who Strongly Agree

■ 2023 ■ 2022

Hot Button

*Percent who strongly agree

Longwoods
INTERNATIONAL
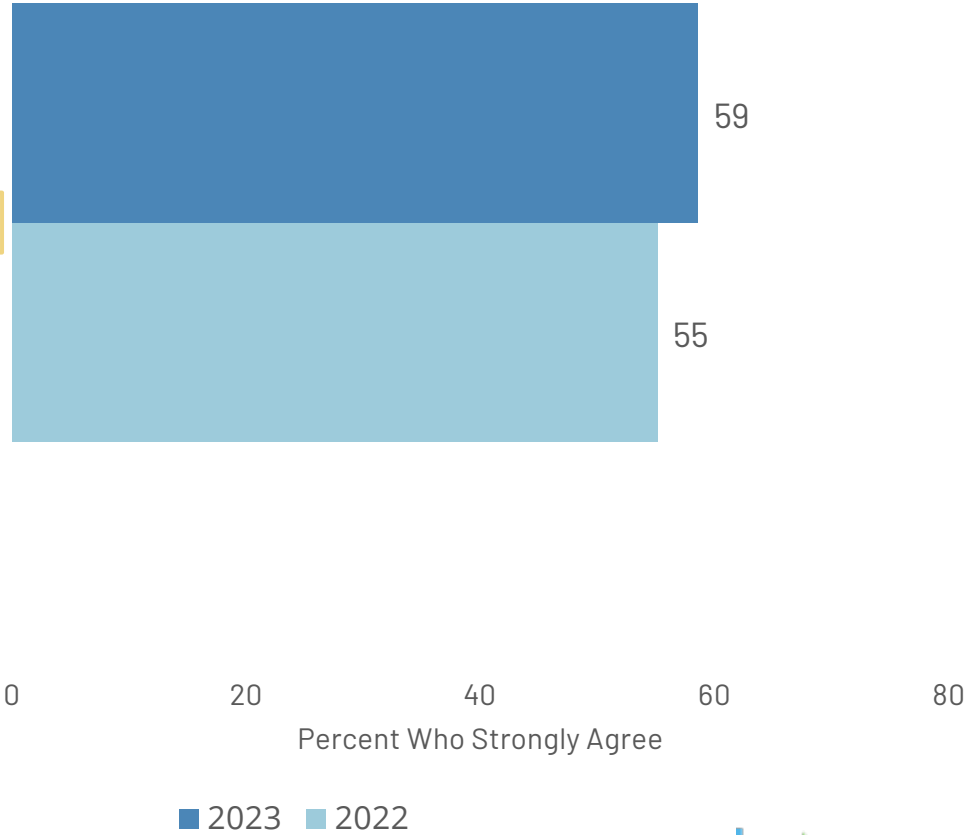
IMAGE – FAMILY ATMOSPHERE: 2023 VS. 2022

Base: Residents of South Dakota's Regional Advertising Markets

FAMILY ATMOSPHERE

2023*	2022*
52	51

*Percent who strongly agree

Good for families
- 2023: 58
- 2022: 58

Children would enjoy
- 2023: 46
- 2022: 44

Percent Who Strongly Agree

■ 2023 ■ 2022

Longwoods INTERNATIONAL

IMAGE – SIGHTSEEING: 2023 VS. 2022

Base: Residents of South Dakota's Regional Advertising Markets

SIGHTSEEING

2023*	2022*
62	61

Hot Button

*Percent who strongly agree

Percent Who Strongly Agree

Attribute	2023	2022
Lots to see and do	49	51
Great place for a Classic American Road Trip	61	59
Truly beautiful scenery	64	64
Truly unique scenery	63	62
Known for diverse landscapes	57	56
Good for viewing wildlife/birds	63	65
Excellent national/state parks	68	69
Authentic historical sites	65	65
Well-known landmarks	69	70

■ 2023 ■ 2022

Longwoods
INTERNATIONAL
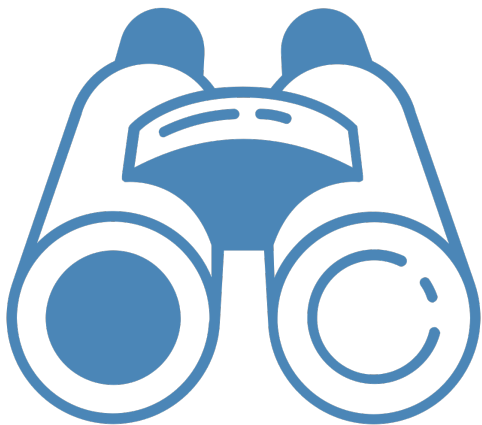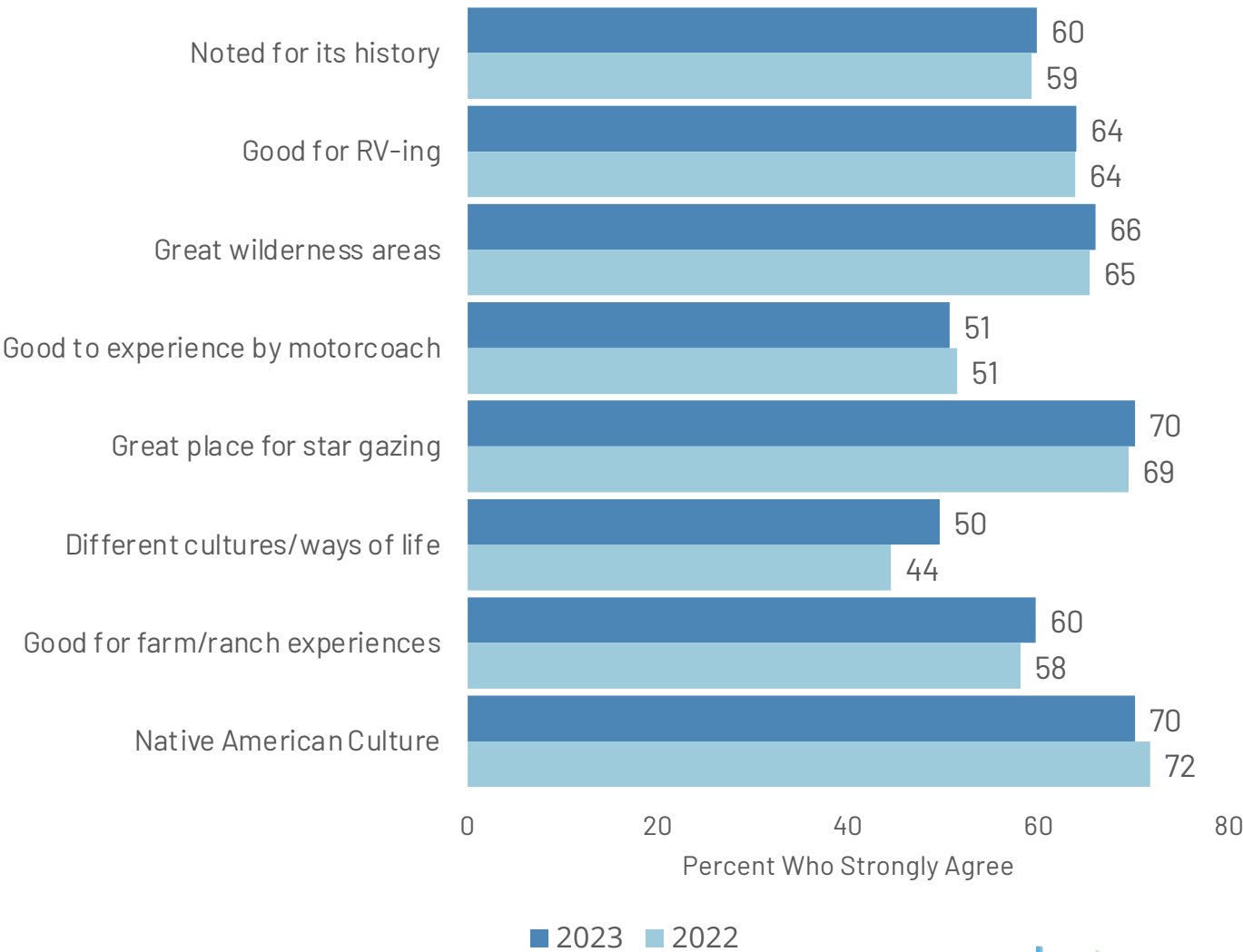
IMAGE – SPORTS AND RECREATION: 2023 VS. 2022

Base: Residents of South Dakota's Regional Advertising Markets

SPORTS AND RECREATION

2023*	2022*
53	53

Percent Who Strongly Agree

Attribute	2023	2022
Good place for camping	62	63
Outdoor recreation activities for all skill levels**	57	66
Great hiking/backpacking	59	59
Excellent canoeing/kayaking/paddleboarding	43	42
Great cycling/off-road biking	51	49
Excellent fishing	52	51
Great for boating/water sports	37	32
Excellent hunting	63	63
Great snowmobiling	54	55
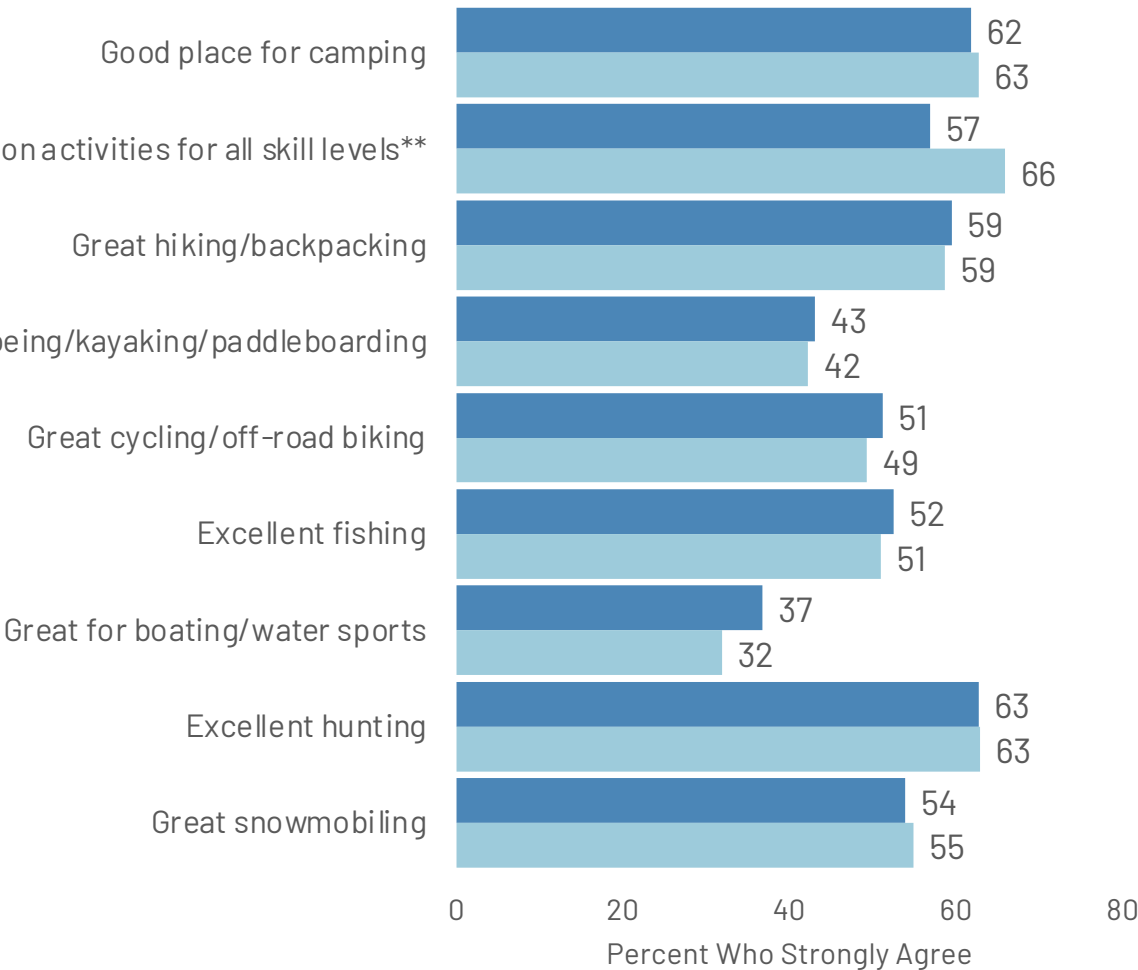
■ 2023 ■ 2022

*Percent who strongly agree
**In 2022, this attribute was labeled: Accessible outdoor recreation

Longwoods
INTERNATIONAL

ADVERTISING IMPACT ON IMAGE

Longwoods INTERNATIONAL
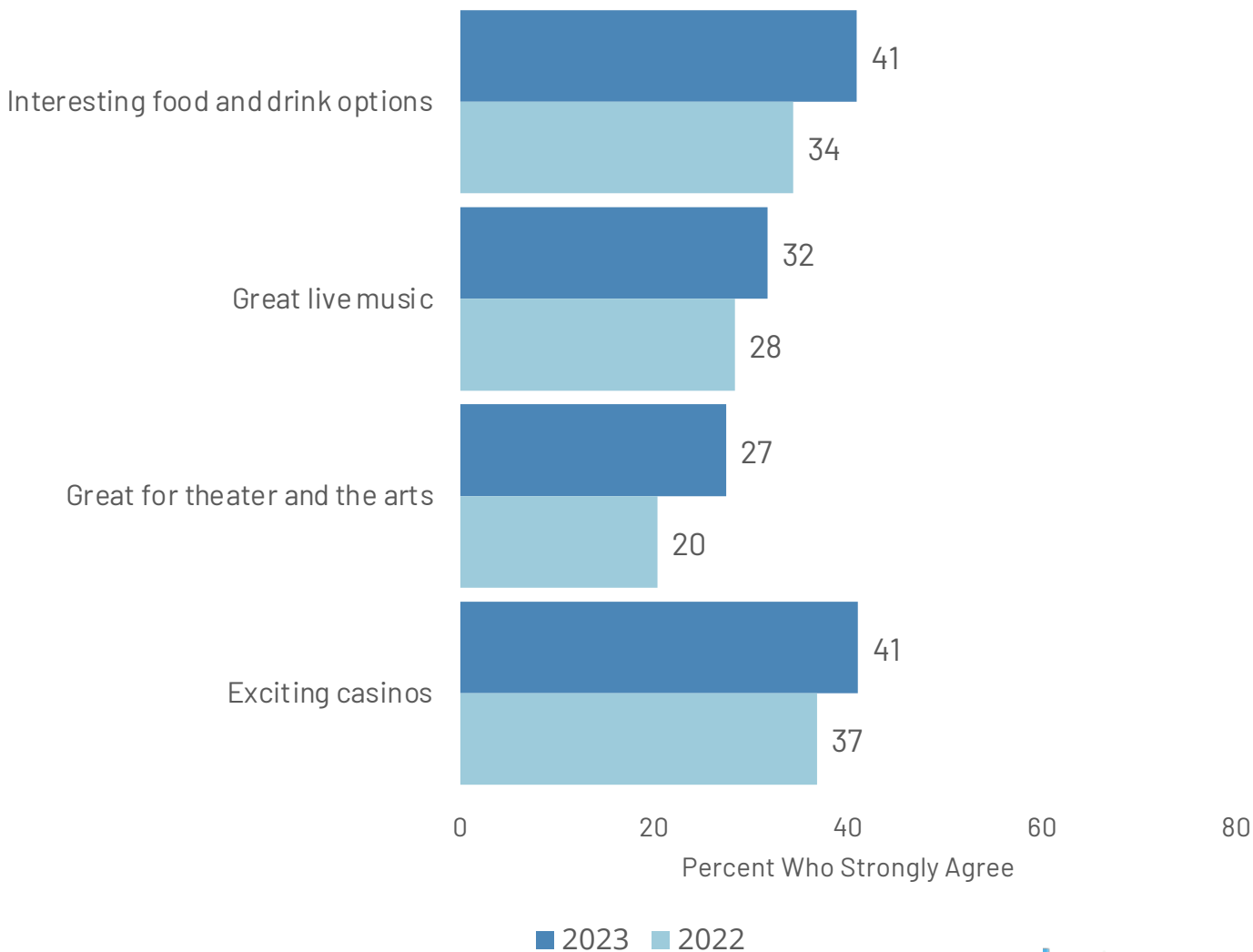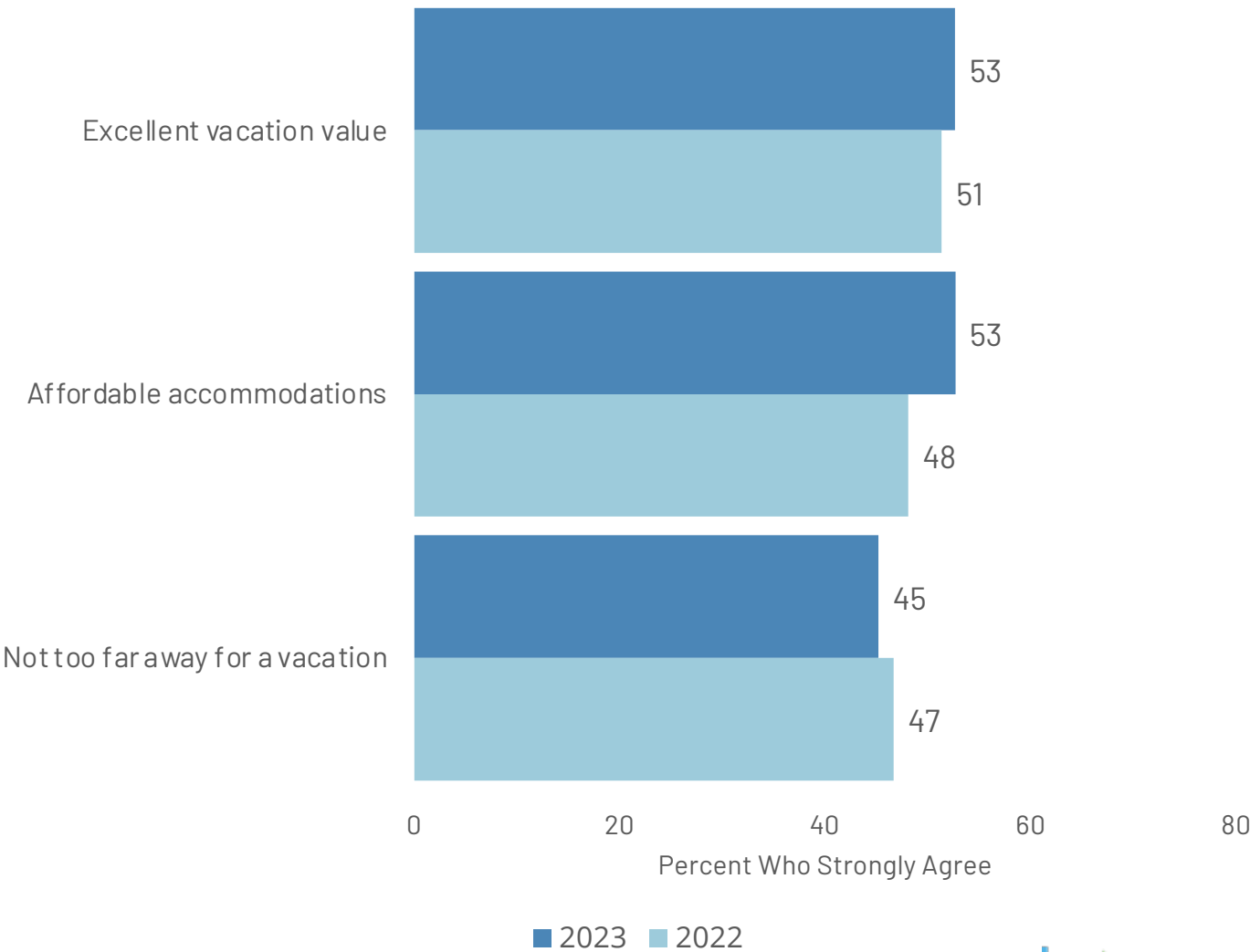
SouthDakota

ADVERTISING IMPACT ON OVERALL IMAGE

Base: Residents of South Dakota's Regional Advertising Markets

This campaign had a positive impact on travelers' perceptions of South Dakota. Travelers aware of the campaign gave the state a significantly higher rating than those unfamiliar with the campaign for the attribute South Dakota is "a place I would really enjoy visiting".

Percent who strongly agree South Dakota is "A place I'd really enjoy visiting." **

Aware*

57%

Unaware

47%
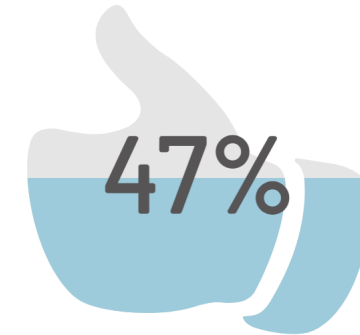
*Saw at least one ad

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

Longwoods
INTERNATIONAL

ADVERTISING IMPACT ON IMAGE

Base: Residents of South Dakota's Regional Advertising Markets

This campaign had a strong, positive impact on travelers' perceptions of South Dakota.

People exposed to the campaign gave the state higher rating scores than those unfamiliar with the campaign across all Travel Motivator categories.

For the more detailed attributes, we find that the campaign did an exceptional job of improving people's perceptions of South Dakota for almost every image dimension evaluated, including 9 of the 10 Hot Buttons.

Attribute	Aware	Unaware
Exciting	54	42
Adult Vacation	58	48
Unique	62	52
Family Atmosphere	56	46
Welcoming	58	52
Popular	49	38
Sightseeing	63	59
Sports and Recreation	55	49
Entertainment	39	26
Affordable	54	43

Percent Who Strongly Agree

■ Aware ■ Unaware

Longwoods INTERNATIONAL
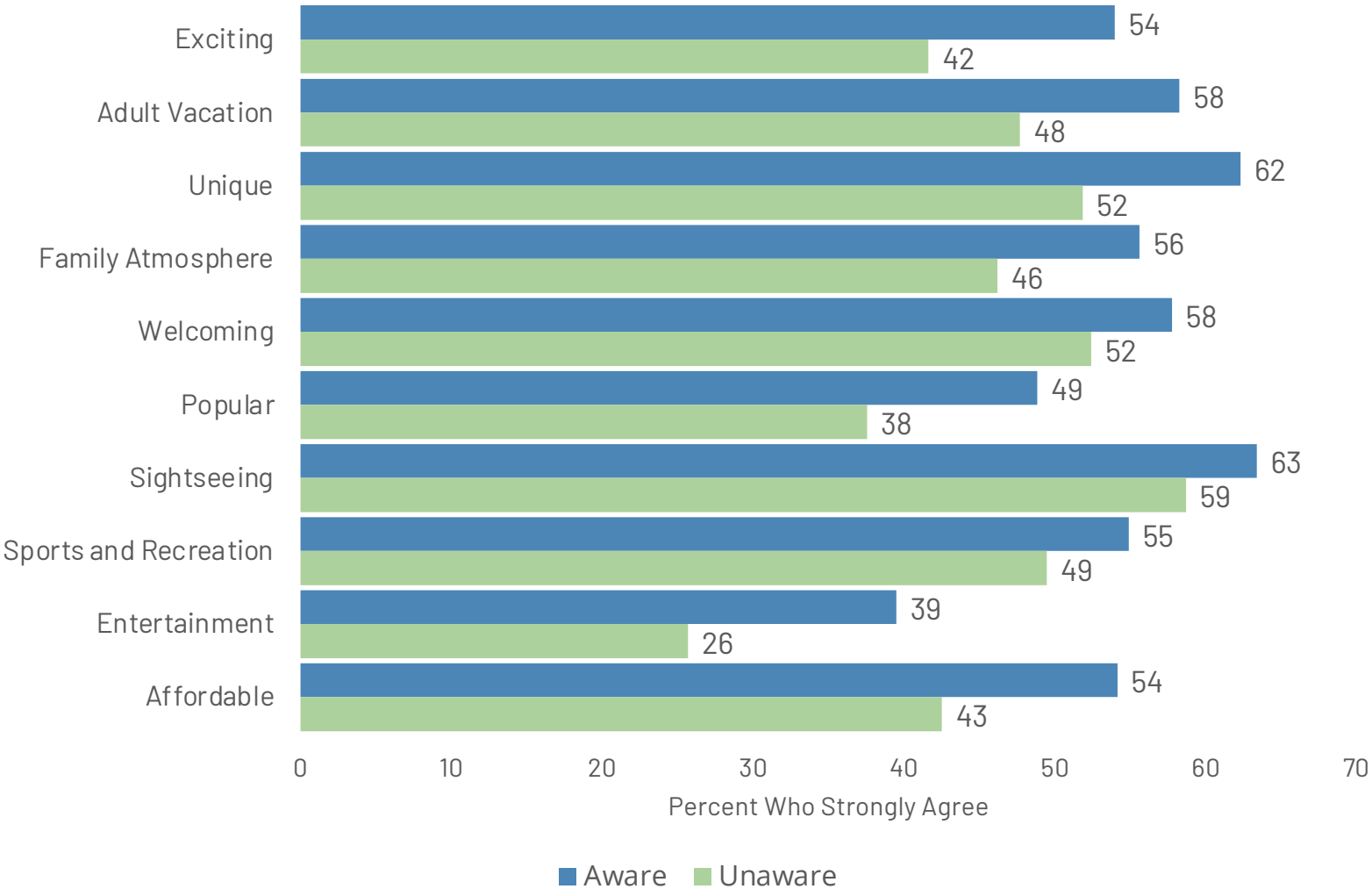
HOT BUTTONS MOST IMPACTED BY ADVERTISING

Base: Residents of South Dakota's Regional Advertising Markets

Category	Value
An exciting place	14
A fun place for vacation	13
Must-see destination	12
Vacationing there is a real adventure	11
Good for adult vacation	11
Unique vacation experience	10
Great place for a Classic American Road Trip	9
Lots to see and do	9
Popular with vacationers	5

Difference in Percent Who Strongly Agree
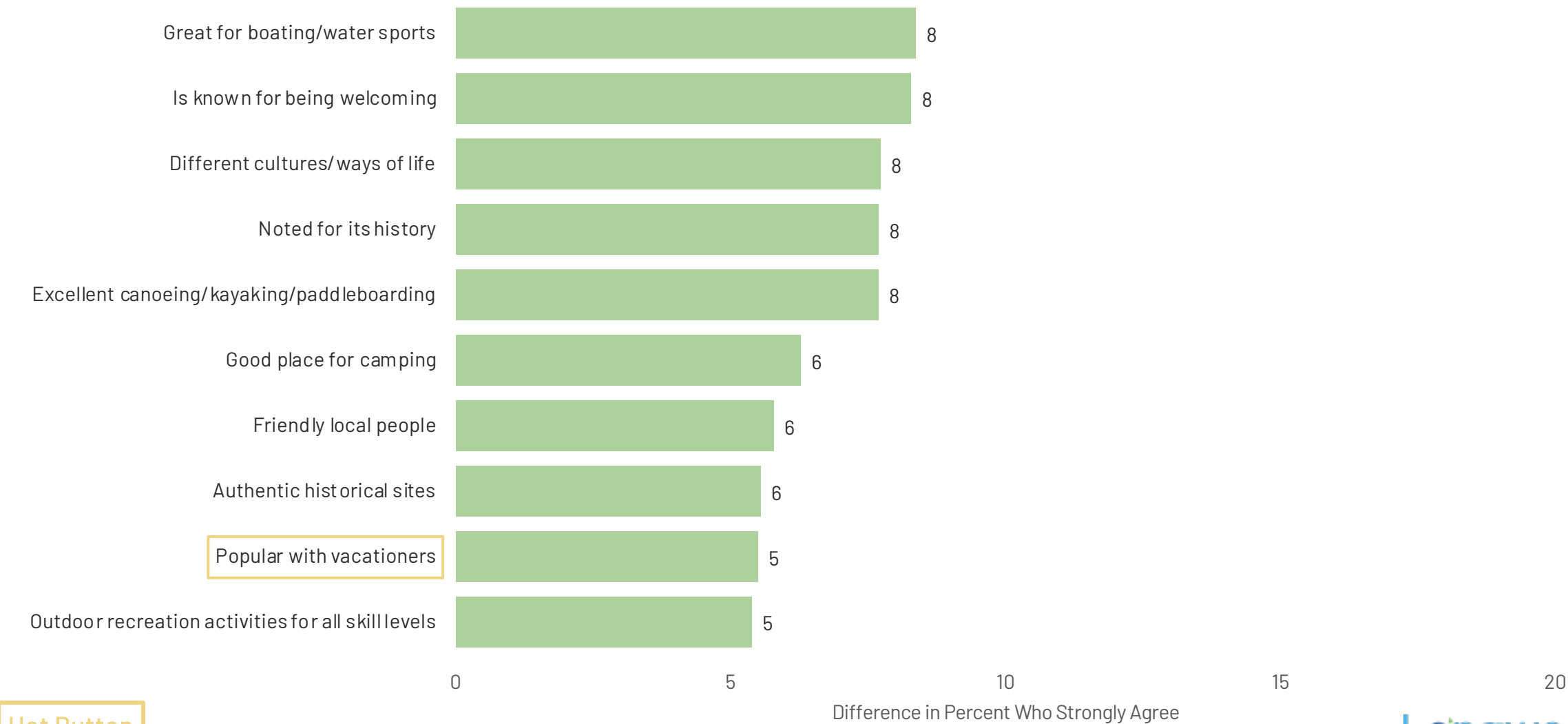
PRODUCT VS. IMAGE

Base: Residents of South Dakota's Regional Advertising Markets
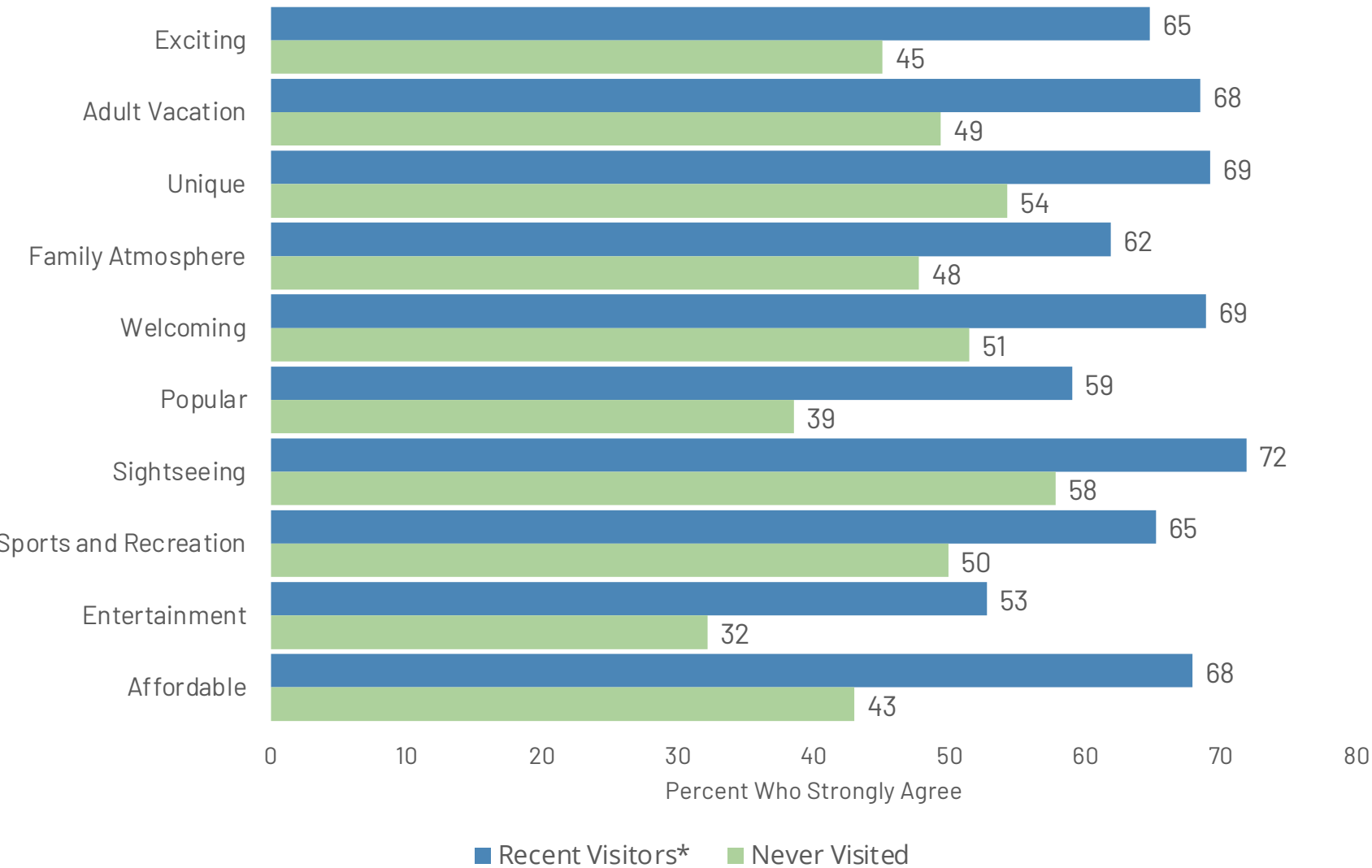
Category	Recent Visitors*	Never Visited
Exciting	65	45
Adult Vacation	68	49
Unique	69	54
Family Atmosphere	62	48
Welcoming	69	51
Popular	59	39
Sightseeing	72	58
Sports and Recreation	65	50
Entertainment	53	32
Affordable	68	43

Percent Who Strongly Agree

■ Recent Visitors*   ■ Never Visited

Comparing the image ratings of people who have **never visited** South Dakota versus that of those who have **visited in the past two years**, we have a measure of "product delivery," the relative satisfaction of the two groups.

More travelers who visited the state in the past two years gave the state higher rating scores than those who have never visited across all Travel Motivator categories. From this analysis we find that South Dakota had no significant product weaknesses.

* Visited in the past 2 years

Longwoods INTERNATIONAL

TOP PRODUCT STRENGTHS VS. IMAGE - HOT BUTTONS

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Value
A fun place for vacation	23
An exciting place	20
Good for adult vacation	19
Popular with vacationers	18
Vacationing there is a real adventure	18
Lots to see and do	18
Must-see destination	18
Great place for a Classic American Road Trip	17
Unique vacation experience	15
Truly beautiful scenery	10

Difference in Percent Who Strongly Agree
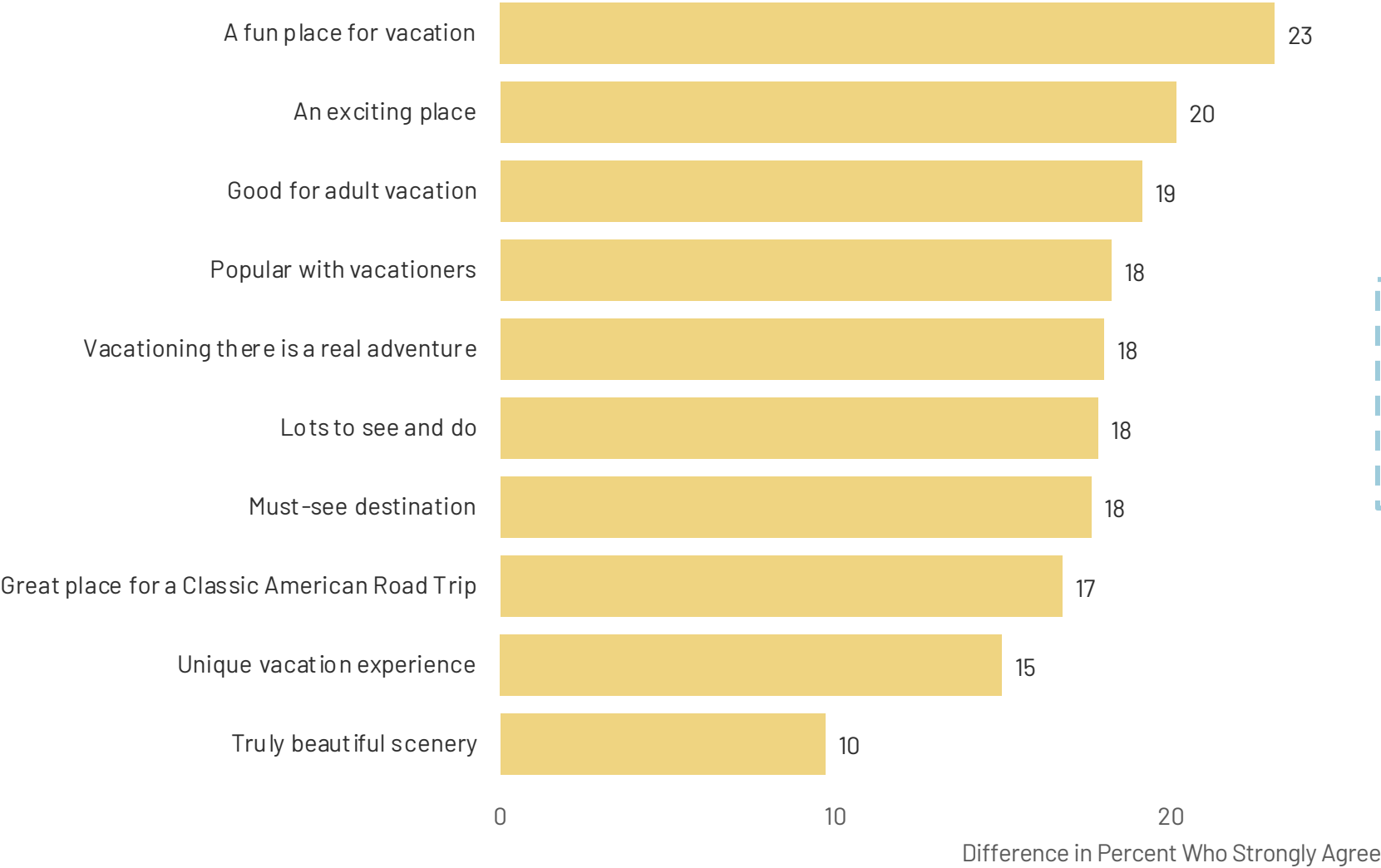
More recent South Dakota visitors than non-visitors rated the state favorably across all 10 Hot Button attributes.

Longwoods
INTERNATIONAL

TOP PRODUCT STRENGTHS VS. IMAGE

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference in Percent Who Strongly Agree
Not too far away for a vacation	33
Exciting casinos	24
A fun place for vacation	23
Interesting food and drink options	23
Well-known destination	22
Excellent vacation value	21
I often notice advertising for this place	21
Good to experience by motorcoach	21
Great live music	20
Affordable accommodations	20
An exciting place	20
Great snowmobiling	19

Difference in Percent Who Strongly Agree

Hot Button

Longwoods INTERNATIONAL

TOP PRODUCT STRENGTHS VS. IMAGE (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference in Percent Who Strongly Agree
Good for adult vacation	19
Great for boating/water sports	19
Friendly local people	19
Is known for being welcoming	19
Popular with vacationers	18
Vacationing there is a real adventure	18
Lots to see and do	18
Must-see destination	18
Noted for its history	17
Children would enjoy	17
Excellent hunting	17
Great place for a Classic American Road Trip	17

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

TOP PRODUCT STRENGTHS VS. IMAGE (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets

Category	Value
Well-known landmarks	17
Good for farm/ranch experiences	16
Outdoor recreation activities for all skill levels	16
Great for theater and the arts	16
Great place for star gazing	15
Unique vacation experience	15
Good place to relax	15
Good place for camping	15
Excellent canoeing/kayaking/paddleboarding	15
Authentic historical sites	14
Excellent fishing	14
Different cultures/ways of life	14

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

TOP PRODUCT STRENGTHS VS. IMAGE (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Value
Great cycling/off-road biking	14
Known for diverse landscapes	13
Good for RV-ing	13
Native American Culture	13
Excellent national/state parks	13
Great wilderness areas	11
Good for families	11
Good for viewing wildlife/birds	11
Great hiking/backpacking	10
Truly beautiful scenery	10
Truly unique scenery	6

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

THERE WERE NO SIGNIFICANT PERCEIVED PRODUCT WEAKNESSES VS. IMAGE

IMAGE VS. THE COMPETITION
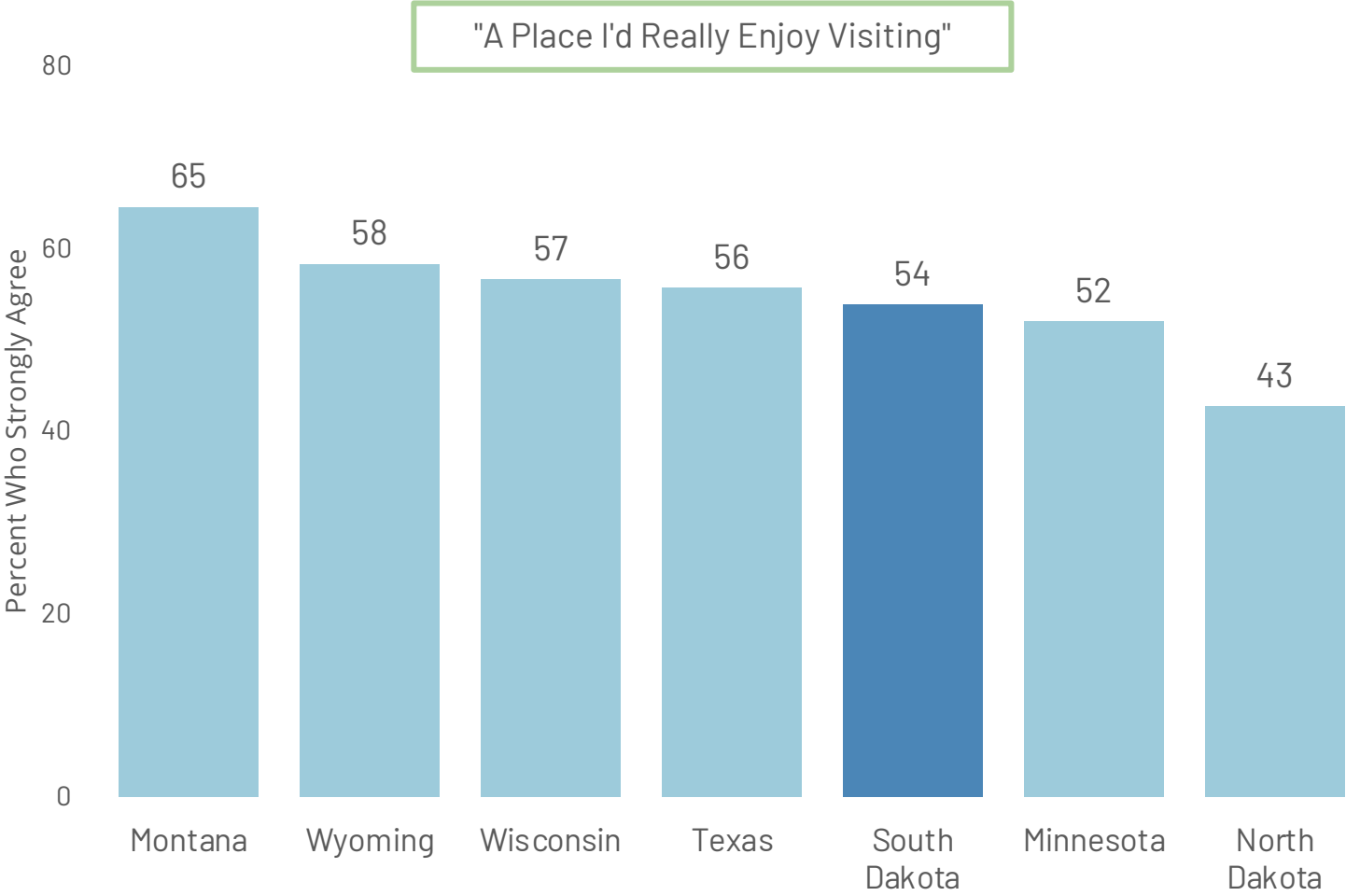
OVERALL IMAGE VS. COMPETITION

Base: Residents of South Dakota's Regional Advertising Markets

"A Place I'd Really Enjoy Visiting"

Chart — Percent Who Strongly Agree:
- Montana: 65
- Wyoming: 58
- Wisconsin: 57
- Texas: 56
- South Dakota: 54
- Minnesota: 52
- North Dakota: 43

Relative to the other destinations in the competitive set for this study, South Dakota is quite competitive against most of the states included in this analysis. Across the markets surveyed, over half rated South Dakota very favorably as a destination they "would really enjoy visiting." South Dakota is ahead of North Dakota, tied with Minnesota and Texas, and behind Montana, Wyoming, and Wisconsin.
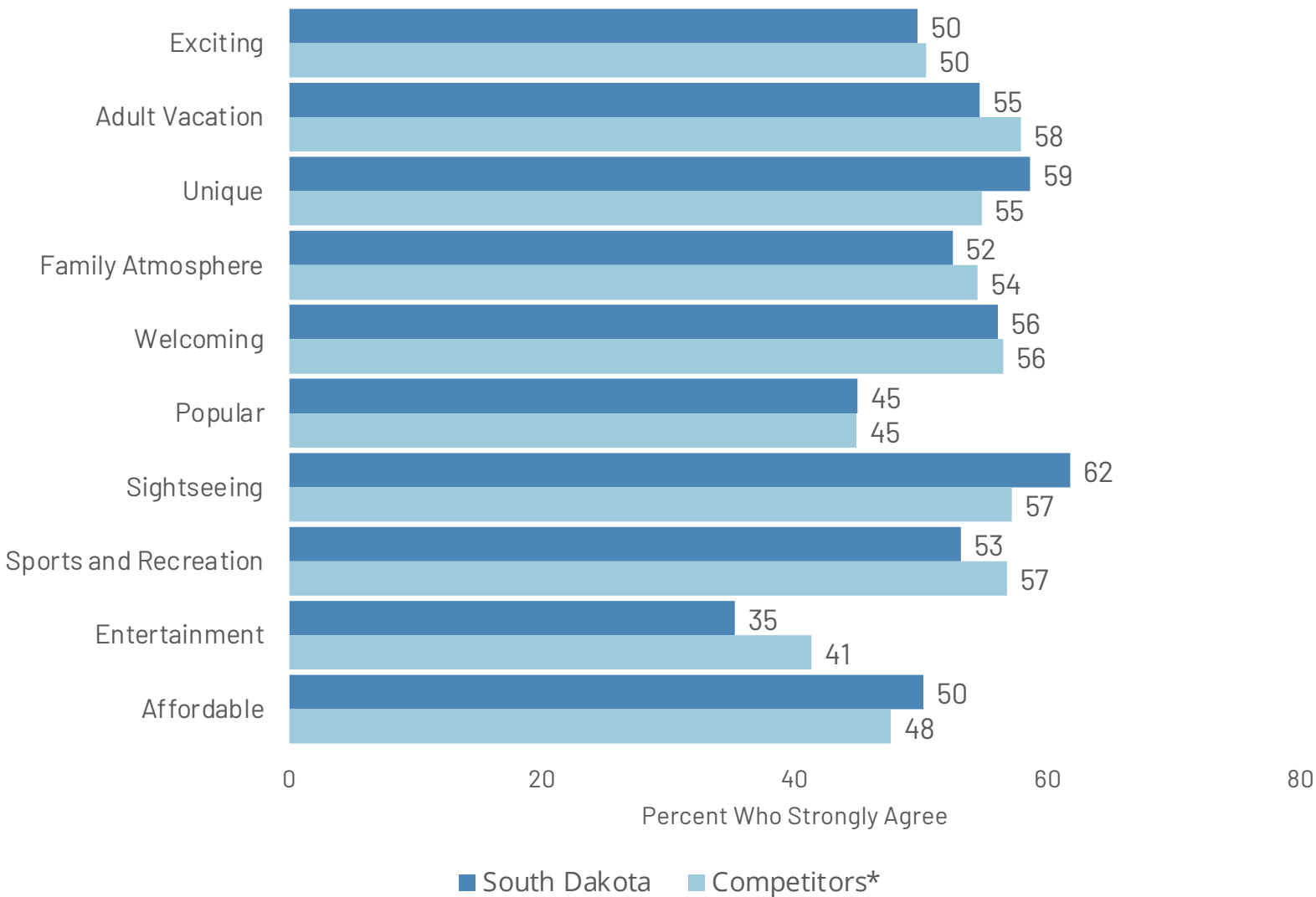
Please note that in 2022, 52% strongly agreed South Dakota is a place I'd really enjoy visiting, which is a statistical tie with this year's result.

Longwoods
INTERNATIONAL

OVERALL IMAGE VS. COMPETITION

Base: Residents of South Dakota's Regional Advertising Markets

When looking at the Travel Motivator categories, it is clear South Dakota is quite evenly matched with the combined competitive set, and statistically tied in most categories.
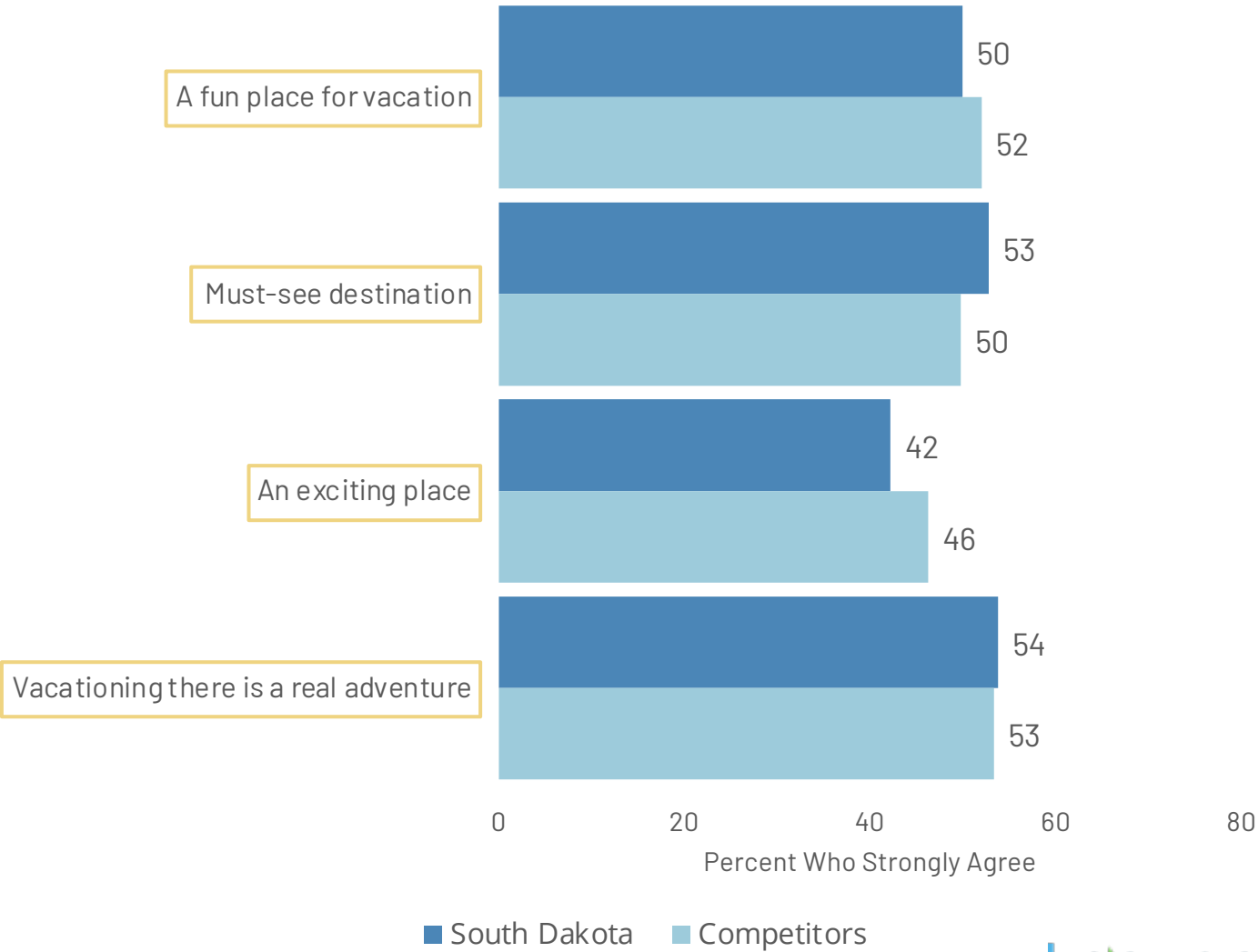
South Dakota is ahead of the competitive set on Unique and Sightseeing, but behind on Sport and Recreation and Entertainment.

Category	South Dakota	Competitors*
Exciting	50	50
Adult Vacation	55	58
Unique	59	55
Family Atmosphere	52	54
Welcoming	56	56
Popular	45	45
Sightseeing	62	57
Sports and Recreation	53	57
Entertainment	35	41
Affordable	50	48

Percent Who Strongly Agree

■ South Dakota ■ Competitors*

* Includes Minnesota, Montana, North Dakota, Texas, Wisconsin, and Wyoming

Longwoods INTERNATIONAL

IMAGE VS. COMPETITION - EXCITING

Base: Residents of South Dakota's Regional Advertising Markets

Percent Who Strongly Agree

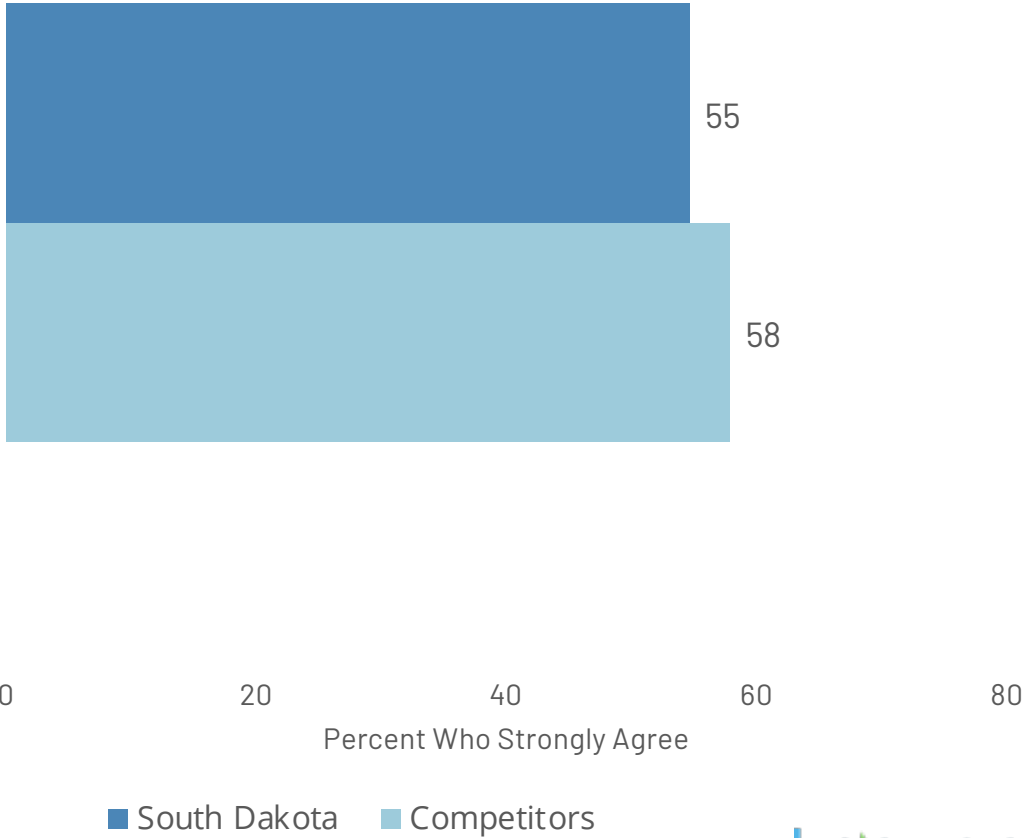| Montana	Texas	Wyoming	Wisconsin	South Dakota	Minnesota	North Dakota
60	55	52	50	50	48	37

Longwoods
INTERNATIONAL
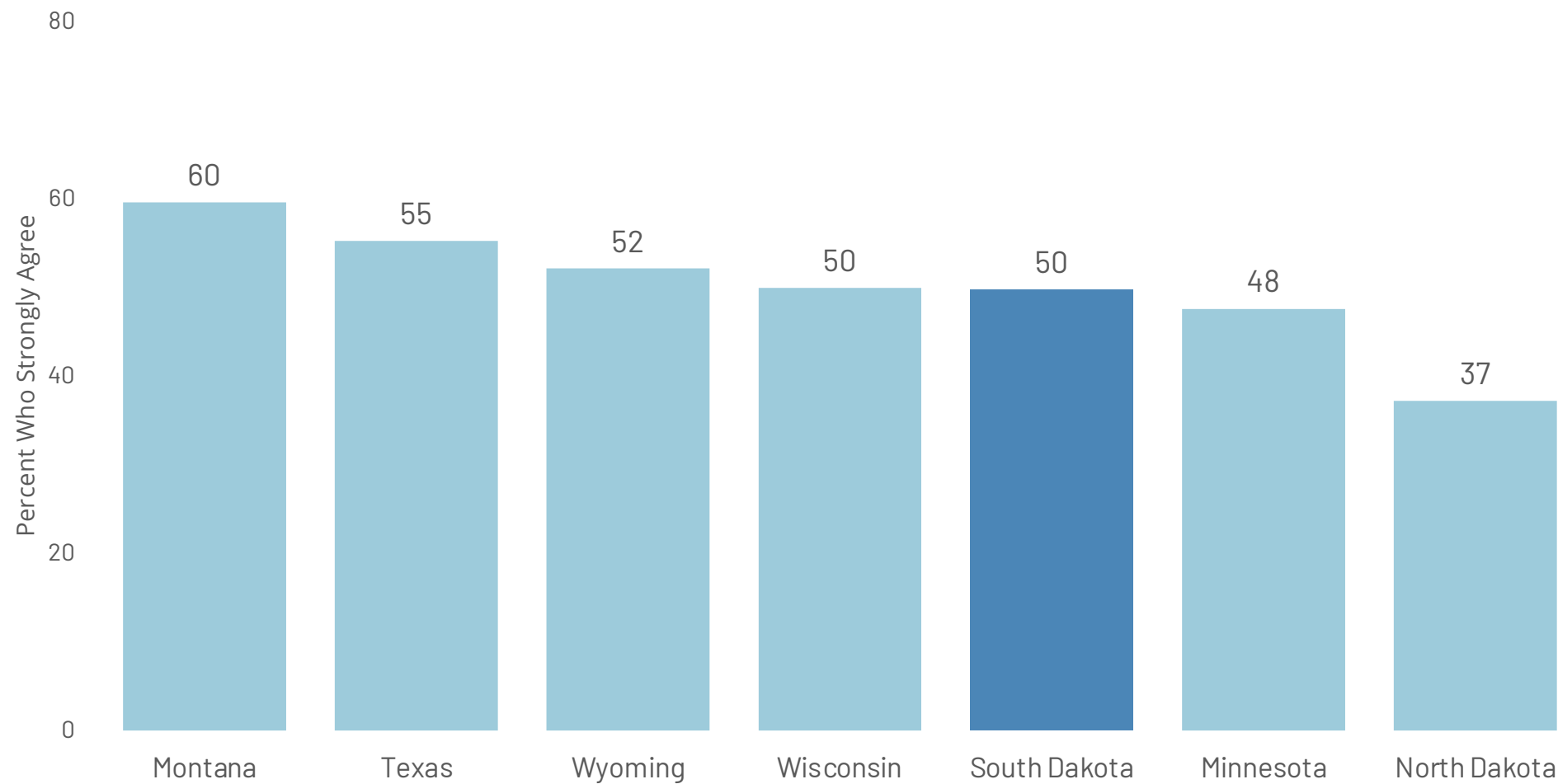
IMAGE VS. COMPETITION - ADULT VACATION

Base: Residents of South Dakota's Regional Advertising Markets

ADULT VACATION

South Dakota*	Competitors*
55	58

Good for adult vacation

55

58

0   20   40   60   80

Percent Who Strongly Agree

■ South Dakota   ■ Competitors

Hot Button   *Percent who strongly agree
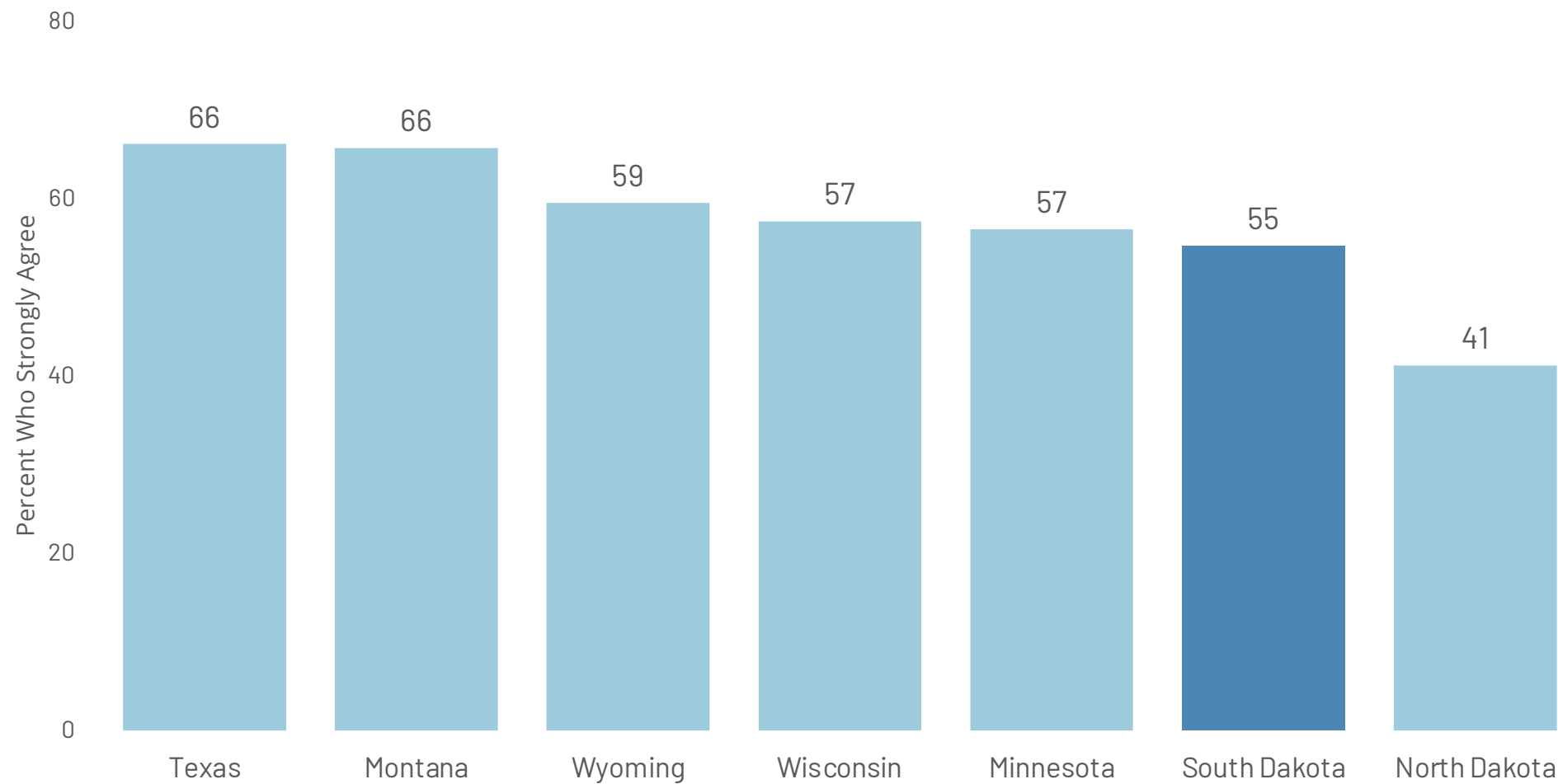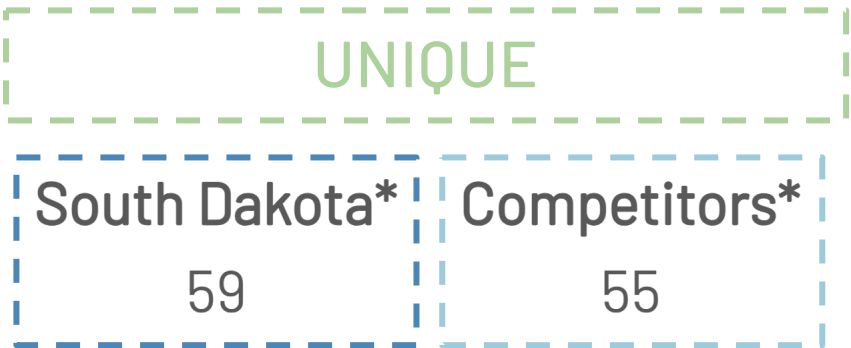
Longwoods
INTERNATIONAL

IMAGE VS. COMPETITION – UNIQUE

Base: Residents of South Dakota's Regional Advertising Markets

UNIQUE

South Dakota* 59

Competitors* 55

Unique vacation experience

59

55

Percent Who Strongly Agree

■ South Dakota ■ Competitors

Hot Button *Percent who strongly agree

Longwoods
INTERNATIONAL

IMAGE VS. COMPETITION – POPULAR

Base: Residents of South Dakota's Regional Advertising Markets

POPULAR

South Dakota*	Competitors*
45	45

Popular with vacationers
- South Dakota: 48
- Competitors: 48

Well-known destination
- South Dakota: 52
- Competitors: 53

I often notice advertising for this place
- South Dakota: 35
- Competitors: 34

Percent Who Strongly Agree

■ South Dakota ■ Competitors

Hot Button   *Percent who strongly agree

Longwoods
INTERNATIONAL

IMAGE VS. COMPETITION – POPULAR

Base: Residents of South Dakota's Regional Advertising Markets

Bar chart showing "Percent Who Strongly Agree":
- Texas: 59
- Montana: 49
- Wisconsin: 47
- South Dakota: 45
- Minnesota: 42
- Wyoming: 41
- North Dakota: 30

Longwoods INTERNATIONAL
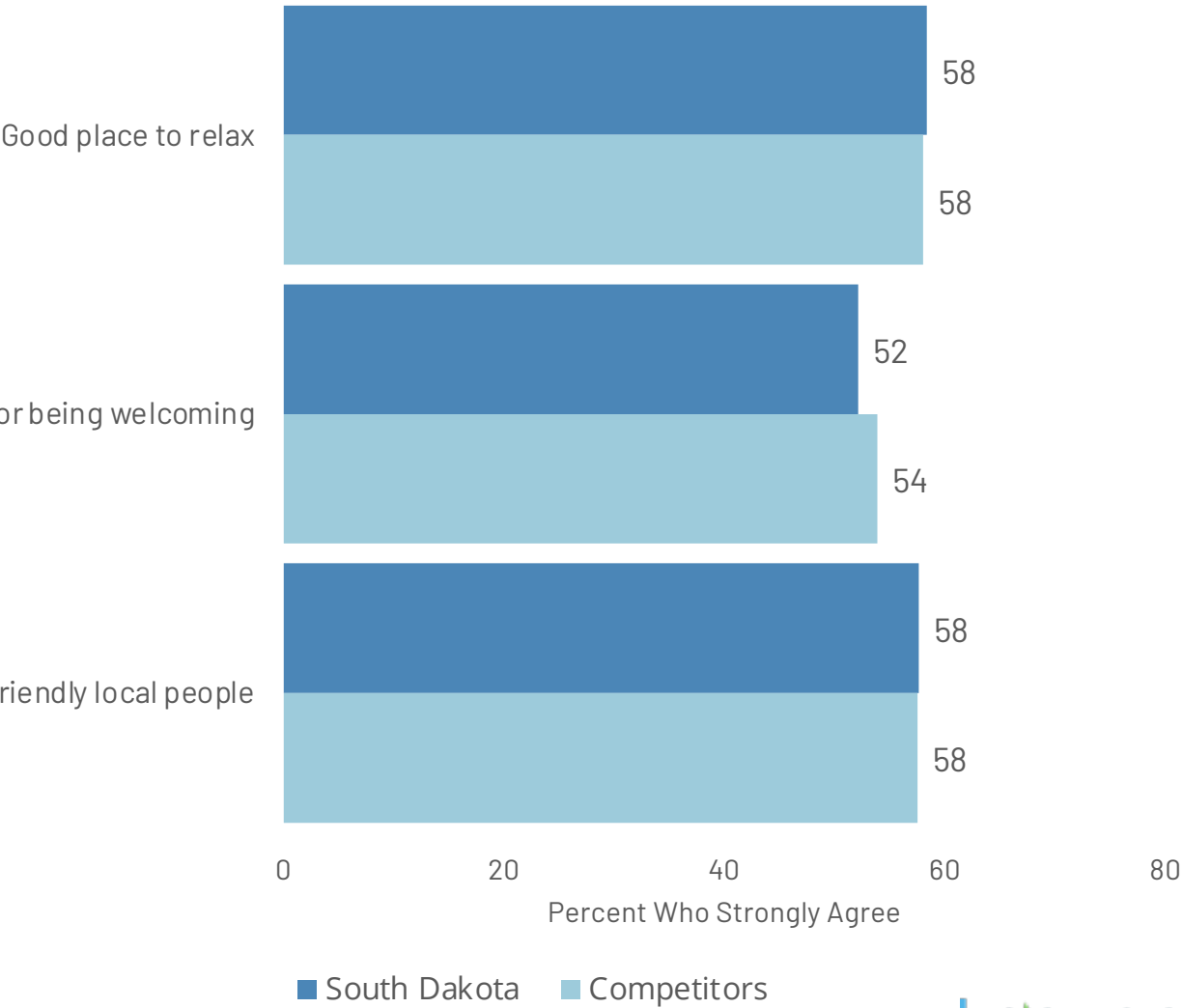
IMAGE VS. COMPETITION – SIGHTSEEING

Base: Residents of South Dakota's Regional Advertising Markets
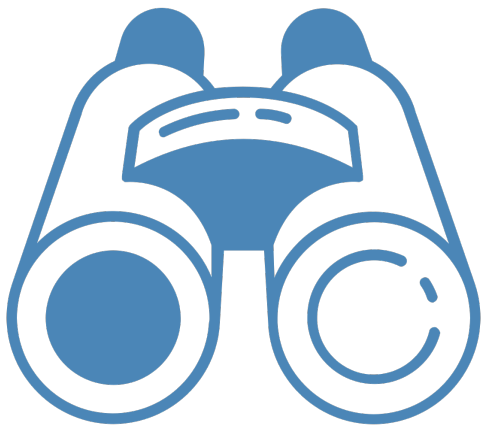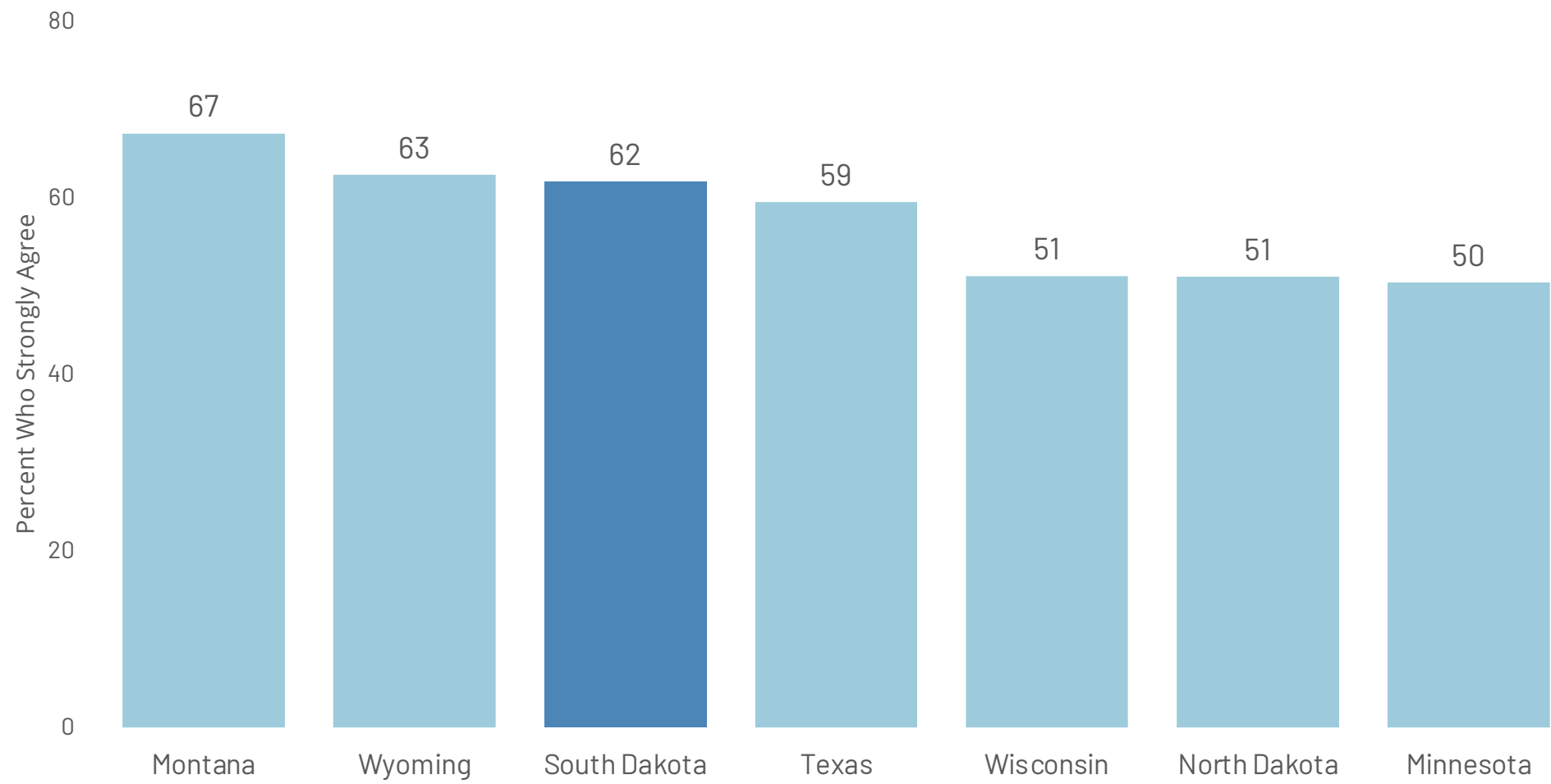
SIGHTSEEING

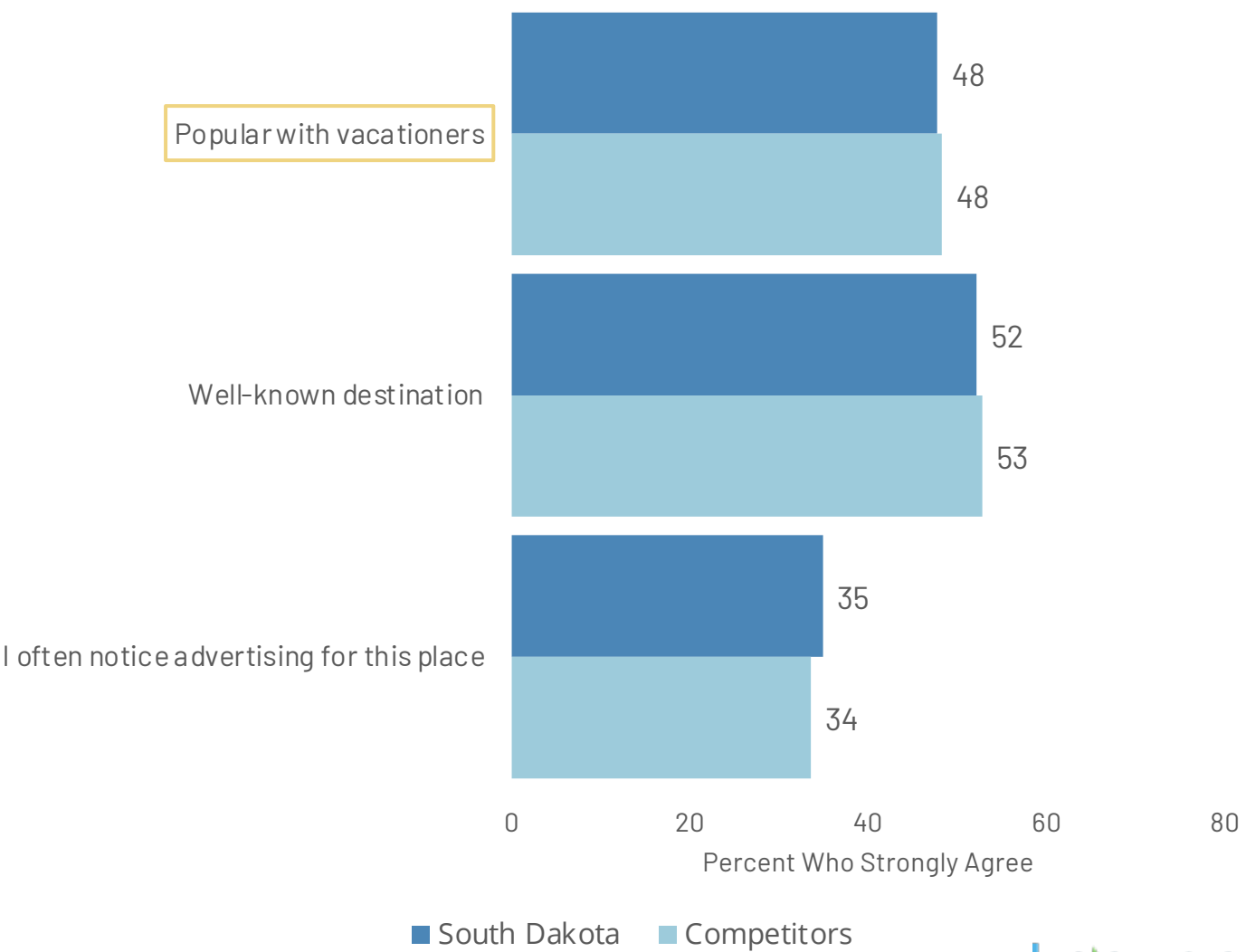| South Dakota*	Competitors*
62	57

Percent Who Strongly Agree

Attribute	South Dakota	Competitors
Lots to see and do	49	54
Great place for a Classic American Road Trip	61	57
Truly beautiful scenery	64	64
Truly unique scenery	63	59
Known for diverse landscapes	57	54
Good for viewing wildlife/birds	63	63
Excellent national/state parks	68	60
Authentic historical sites	65	55
Well-known landmarks	69	51

■ South Dakota ■ Competitors

Hot Button

*Percent who strongly agree

Longwoods INTERNATIONAL

IMAGE VS. COMPETITION – SPORTS AND RECREATION

Base: Residents of South Dakota's Regional Advertising Markets

SPORTS AND RECREATION

South Dakota*	Competitors*
53	57

	South Dakota	Competitors
Good place for camping	62	60
Outdoor recreation activities for all skill levels	57	60
Great hiking/backpacking	59	57
Excellent canoeing/kayaking/paddleboarding	43	53
Great cycling/off-road biking	51	51
Excellent fishing	52	62
Great for boating/water sports	37	51
Excellent hunting	63	63
Great snowmobiling	54	54

Percent Who Strongly Agree

■ South Dakota ■ Competitors

*Percent who strongly agree

Longwoods INTERNATIONAL

IMAGE VS. COMPETITION – SPORTS AND RECREATION

Base: Residents of South Dakota's Regional Advertising Markets

Percent Who Strongly Agree

Montana	Minnesota	Wisconsin	Wyoming	South Dakota	North Dakota	Texas
65	62	61	56	53	49	45

Longwoods
INTERNATIONAL

IMAGE VS. COMPETITION - ENTERTAINMENT

Base: Residents of South Dakota's Regional Advertising Markets
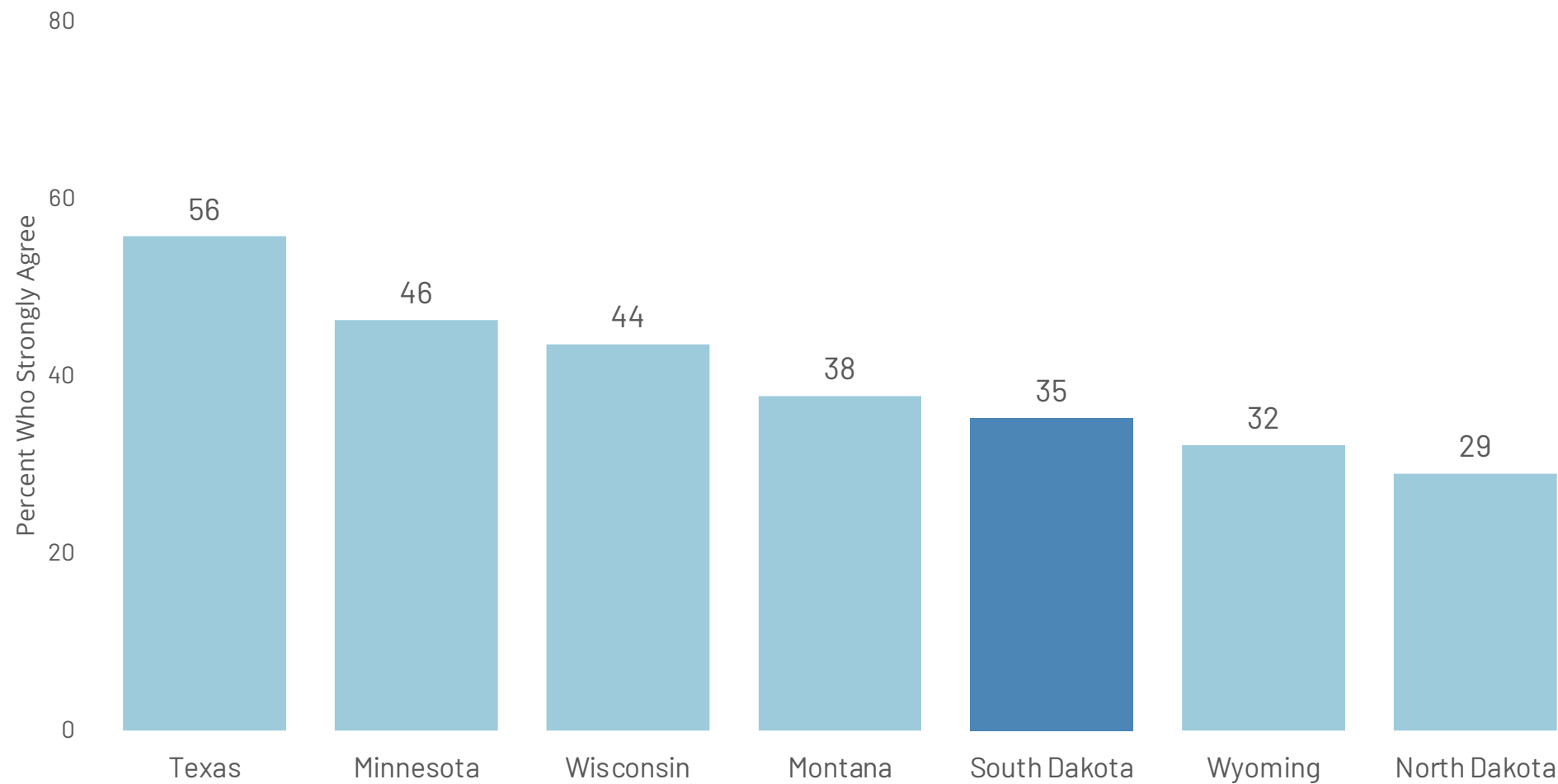
ENTERTAINMENT

South Dakota*	Competitors*
35	41

Interesting food and drink options
- South Dakota: 41
- Competitors: 49

Great live music
- South Dakota: 32
- Competitors: 43

Great for theater and the arts
- South Dakota: 27
- Competitors: 35

Exciting casinos
- South Dakota: 41
- Competitors: 38

Percent Who Strongly Agree

■ South Dakota ■ Competitors

*Percent who strongly agree

Longwoods INTERNATIONAL
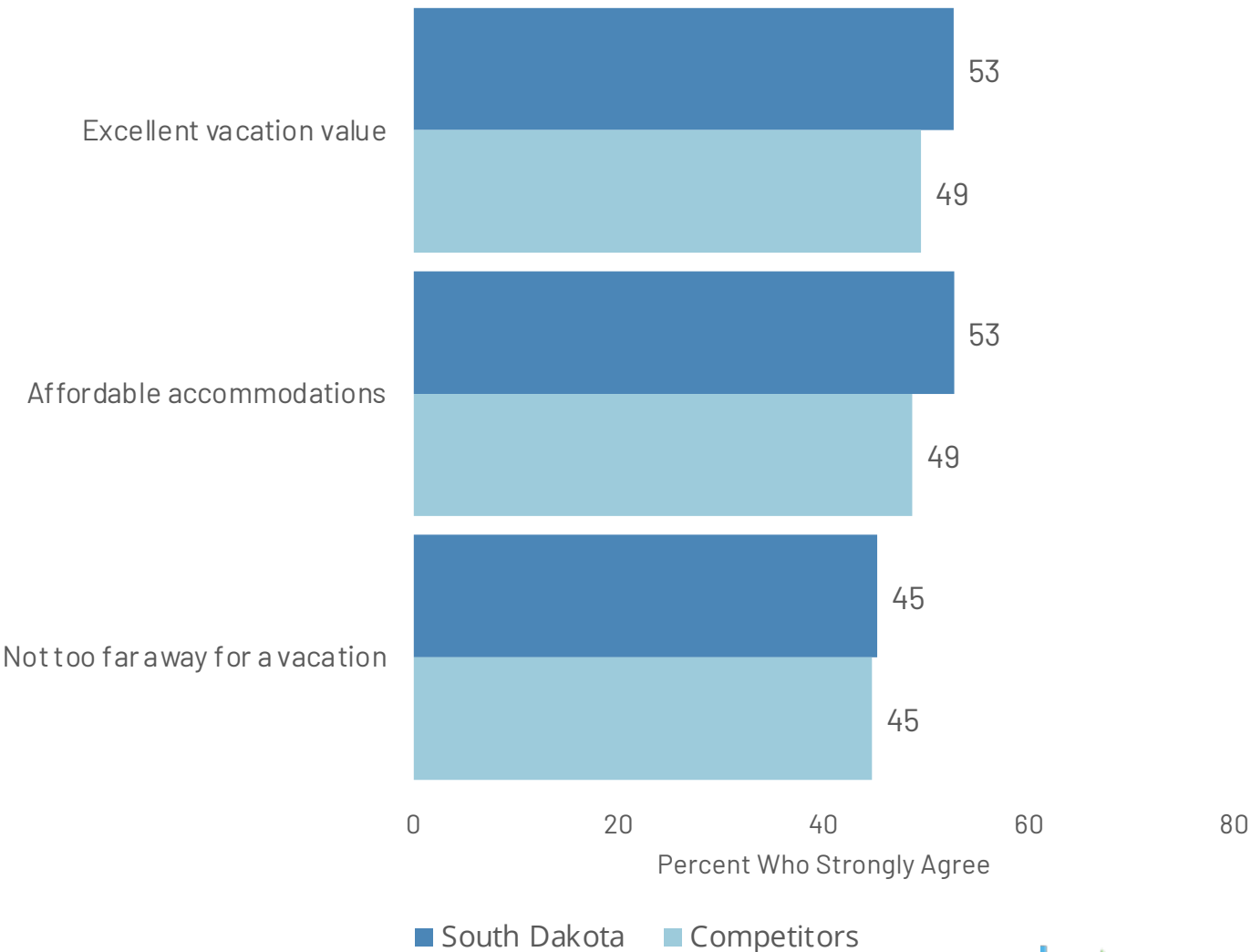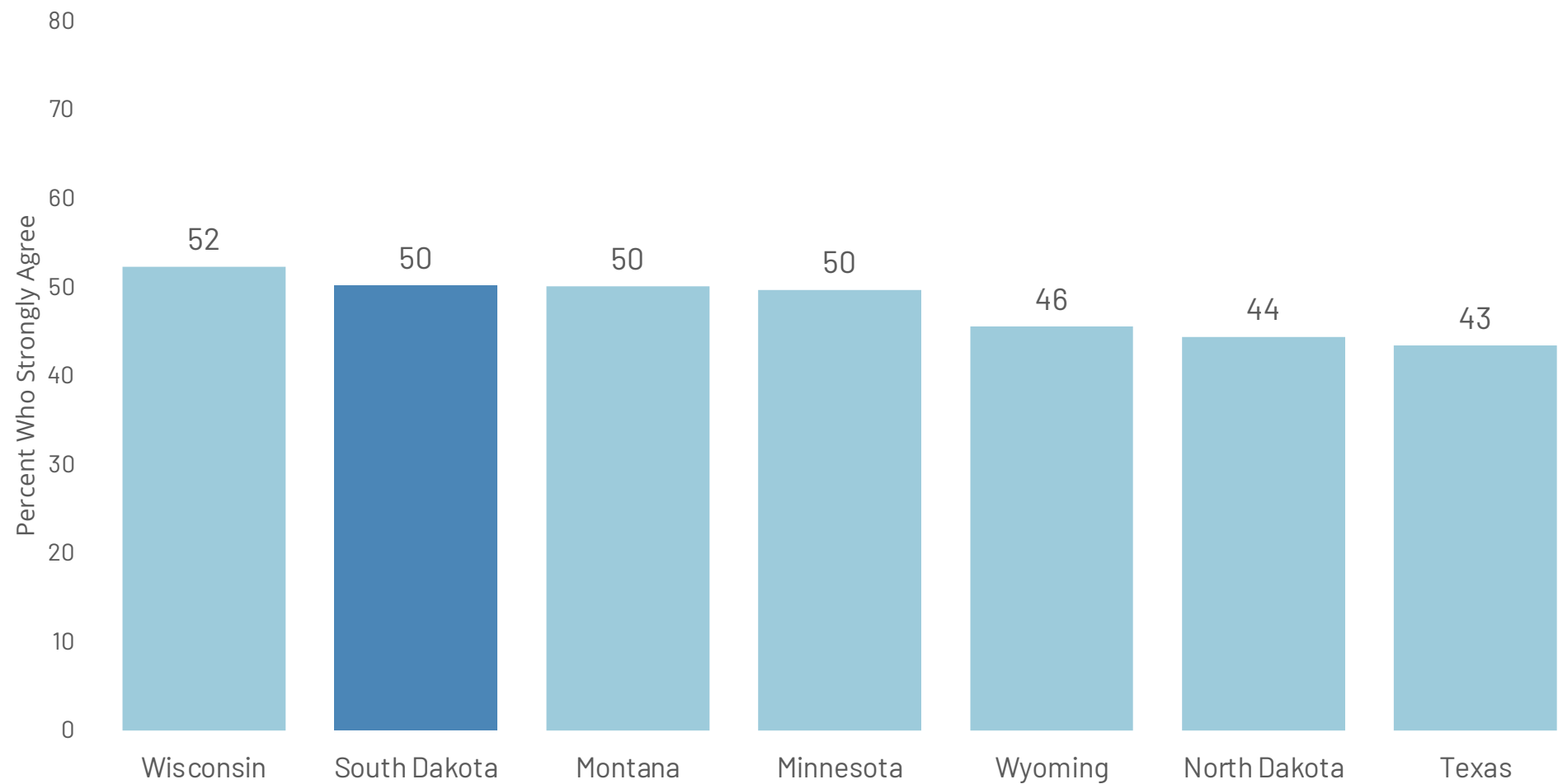
IMAGE STRENGTHS VS. COMPETITION

Base: Residents of South Dakota's Regional Advertising Markets

South Dakota has 6 image attribute strengths when compared to the competitive set, around history, culture, and the outdoors.

Attribute	Difference in Percent Who Strongly Agree
Well-known landmarks	18
Native American Culture	16
Authentic historical sites	10
Noted for its history	8
Excellent national/state parks	8
Great place for star gazing	6

Difference in Percent Who Strongly Agree

Longwoods
INTERNATIONAL
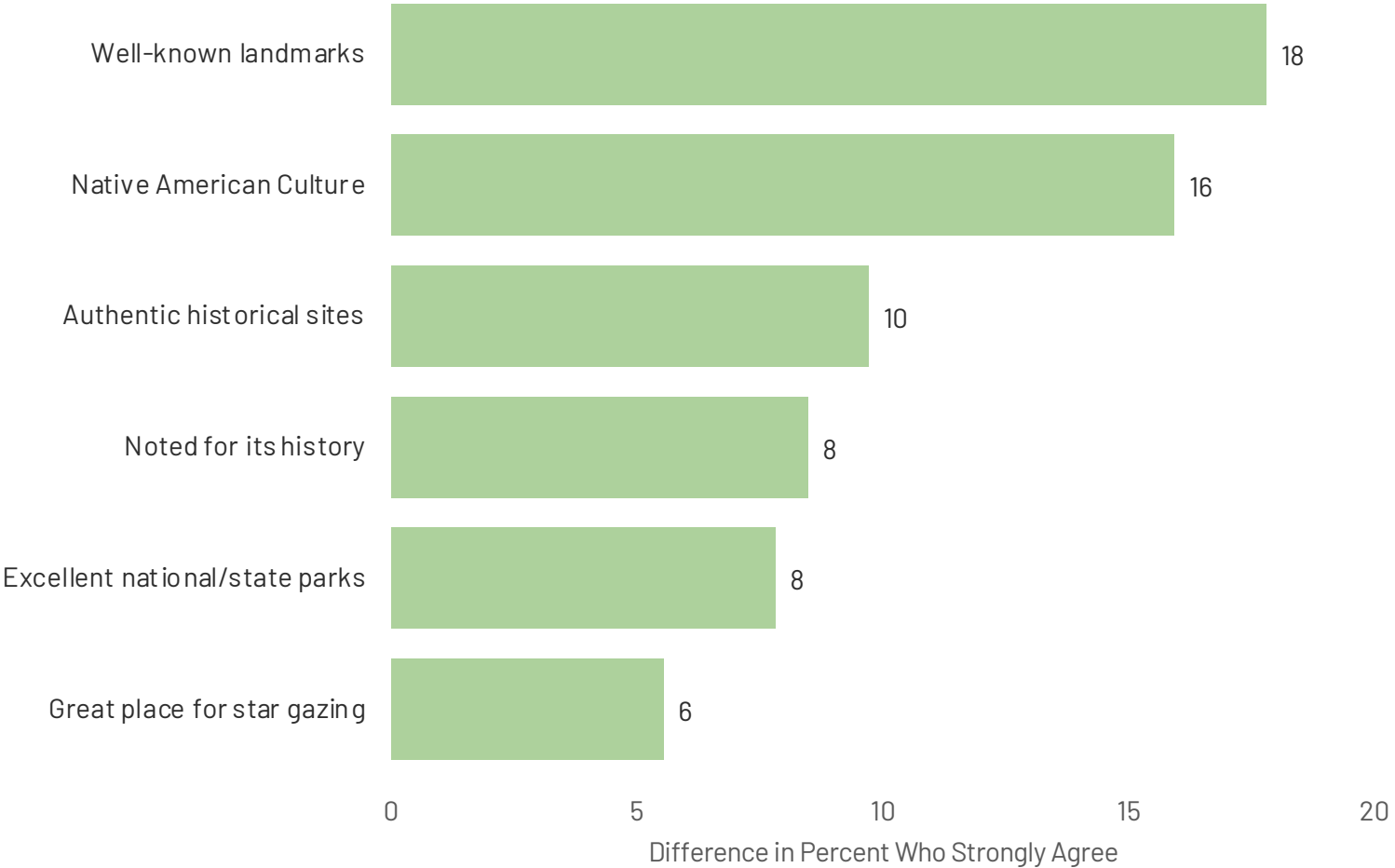
IMAGE WEAKNESSES VS. COMPETITION

Base: Residents of South Dakota's Regional Advertising Markets
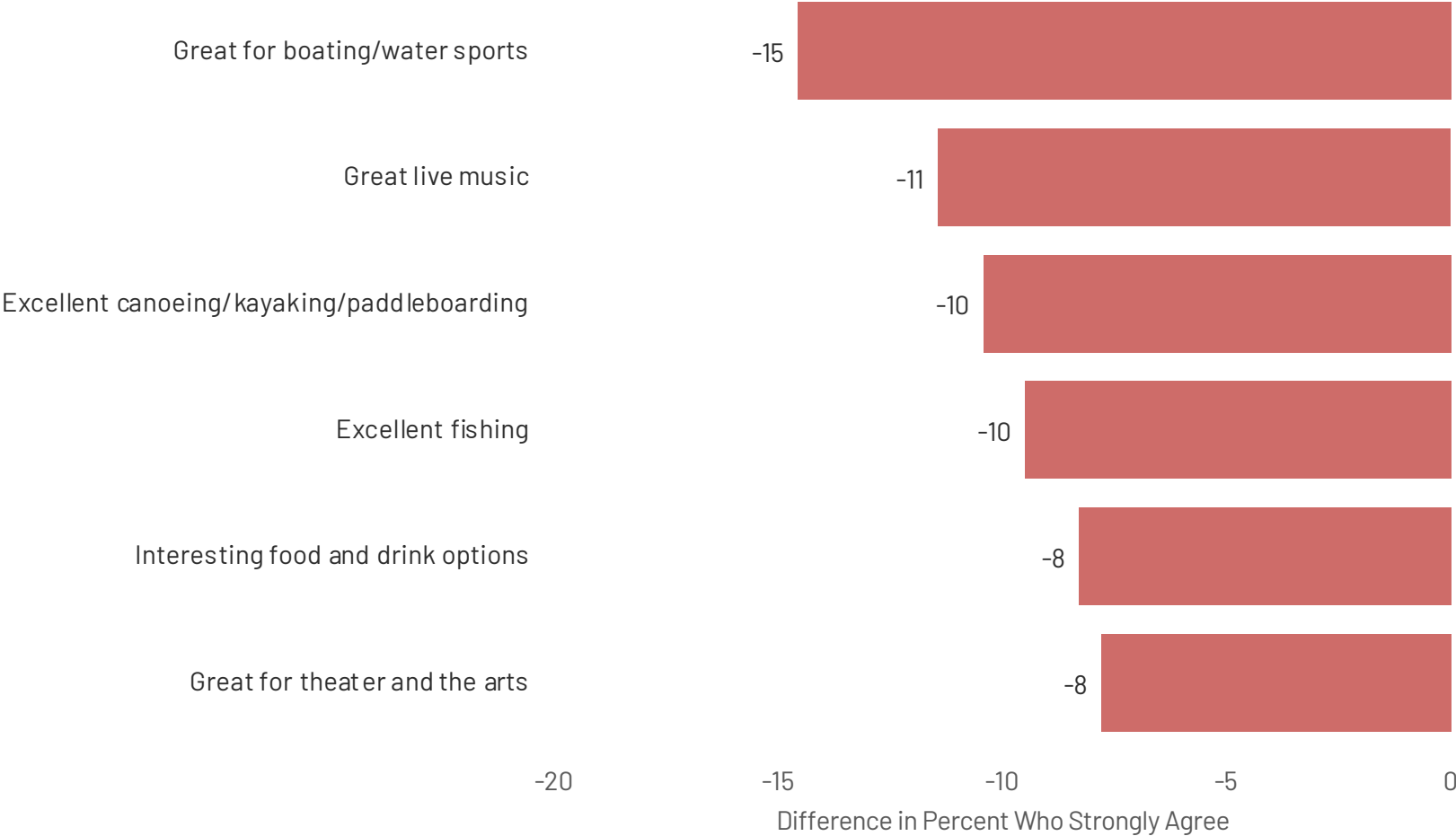
Attribute	Difference
Great for boating/water sports	-15
Great live music	-11
Excellent canoeing/kayaking/paddleboarding	-10
Excellent fishing	-10
Interesting food and drink options	-8
Great for theater and the arts	-8

Difference in Percent Who Strongly Agree

However, there are 6 image attributes where South Dakota lags the competitive set, around outdoors and urban-associated attributes. Encouragingly, none of these are Hot Buttons.

Longwoods INTERNATIONAL

"HALO EFFECT" ON ECONOMIC DEVELOPMENT

Longwoods INTERNATIONAL

SouthDakota

THE "HALO EFFECT"

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

IMPACT OF *TOURISM AD AWARENESS* ON ECONOMIC DEVELOPMENT IMAGE
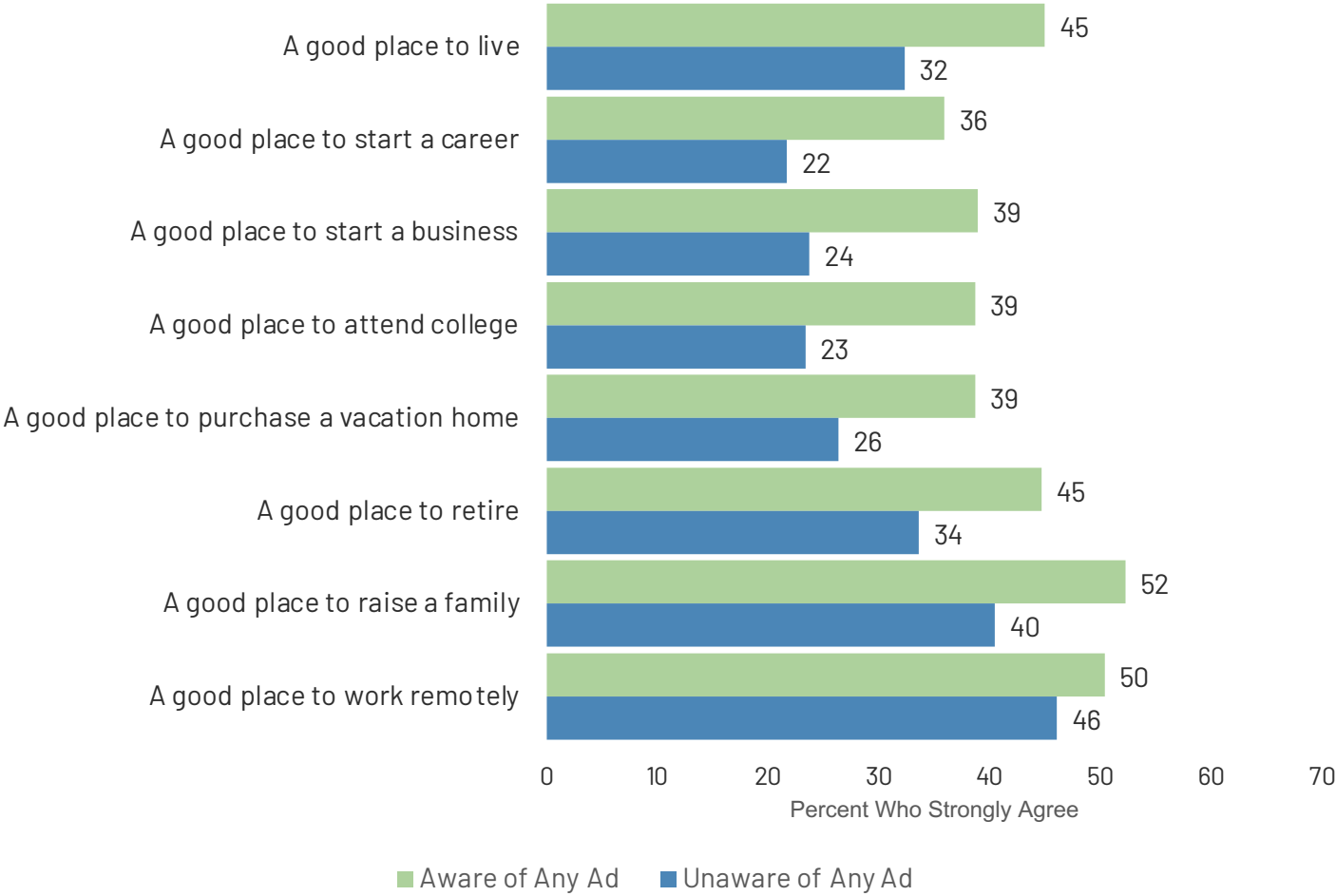
Base: Residents of South Dakota's Regional Advertising Markets

In every case studied, South Dakota's tourism advertising significantly improved the image of the state for a wide range of economic development objectives.

Those who saw the advertising rated South Dakota higher on all economic development indicators.

	Aware of Any Ad	Unaware of Any Ad
A good place to live	45	32
A good place to start a career	36	22
A good place to start a business	39	24
A good place to attend college	39	23
A good place to purchase a vacation home	39	26
A good place to retire	45	34
A good place to raise a family	52	40
A good place to work remotely	50	46

Percent Who Strongly Agree

■ Aware of Any Ad ■ Unaware of Any Ad

Longwoods INTERNATIONAL

IMPACT OF *VISITATION* ON ECONOMIC DEVELOPMENT IMAGE

Base: Residents of South Dakota's Regional Advertising Markets

Travelers who visited South Dakota during the past two years consistently rated the state higher for all economic development indicators than those who have never visited.

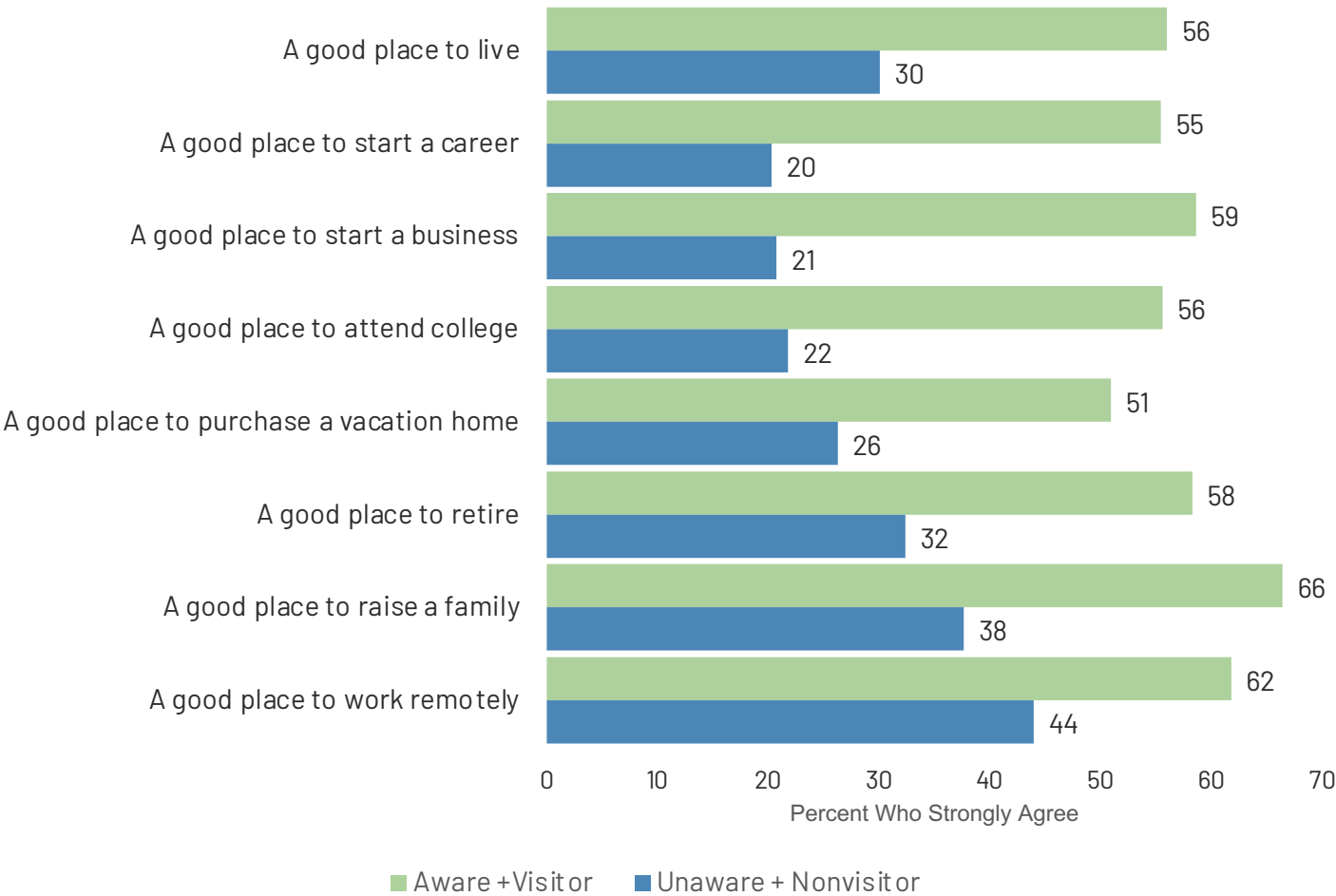| Indicator	Visited Past 2 Years	Never
A good place to live	54	38
A good place to start a career	52	29
A good place to start a business	55	30
A good place to attend college	53	31
A good place to purchase a vacation home	49	33
A good place to retire	56	39
A good place to raise a family	65	44
A good place to work remotely	61	46

Percent Who Strongly Agree

■ Visited Past 2 Years ■ Never

Longwoods
INTERNATIONAL

APPENDIX: IMAGE STRENGTHS AND WEAKNESSES VS. INDIVIDUAL COMPETITION

SouthDakota

IMAGE STRENGTHS VS. NORTH DAKOTA

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Value
Well-known landmarks	27
Well-known destination	17
Authentic historical sites	17
Excellent national/state parks	16
Must-see destination	16
Unique vacation experience	15
A fun place for vacation	15
Popular with vacationers	15
Great place for a Classic American Road Trip	14
Noted for its history	14
Good for adult vacation	13
I often notice advertising for this place	12

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

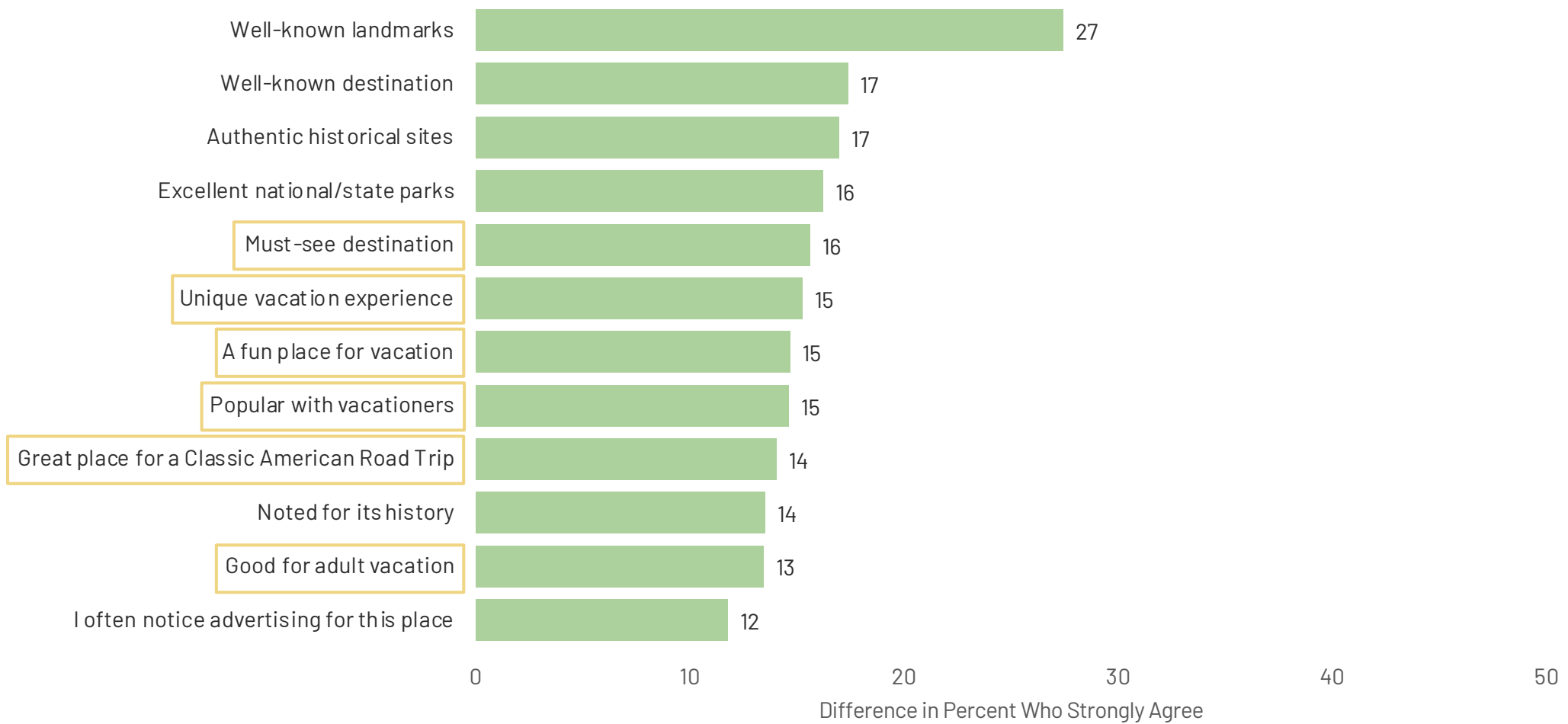# THERE WERE NO SIGNIFICANT PERCEIVED IMAGE WEAKNESSES VS. NORTH DAKOTA

SOUTH DAKOTA VS. MINNESOTA: IMAGE STRENGTHS AND WEAKNESSES

IMAGE STRENGTHS VS. MINNESOTA
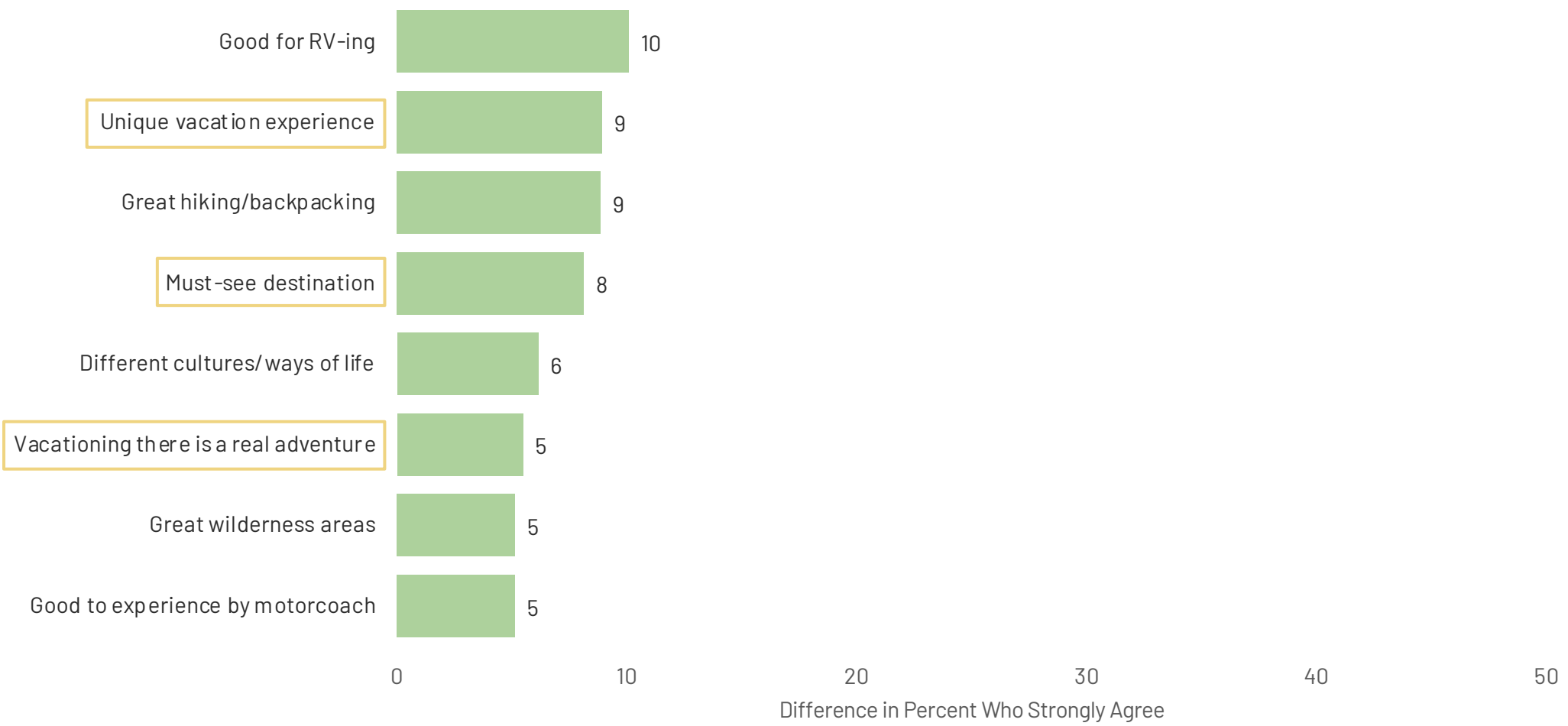
Base: Residents of South Dakota's Regional Advertising Markets
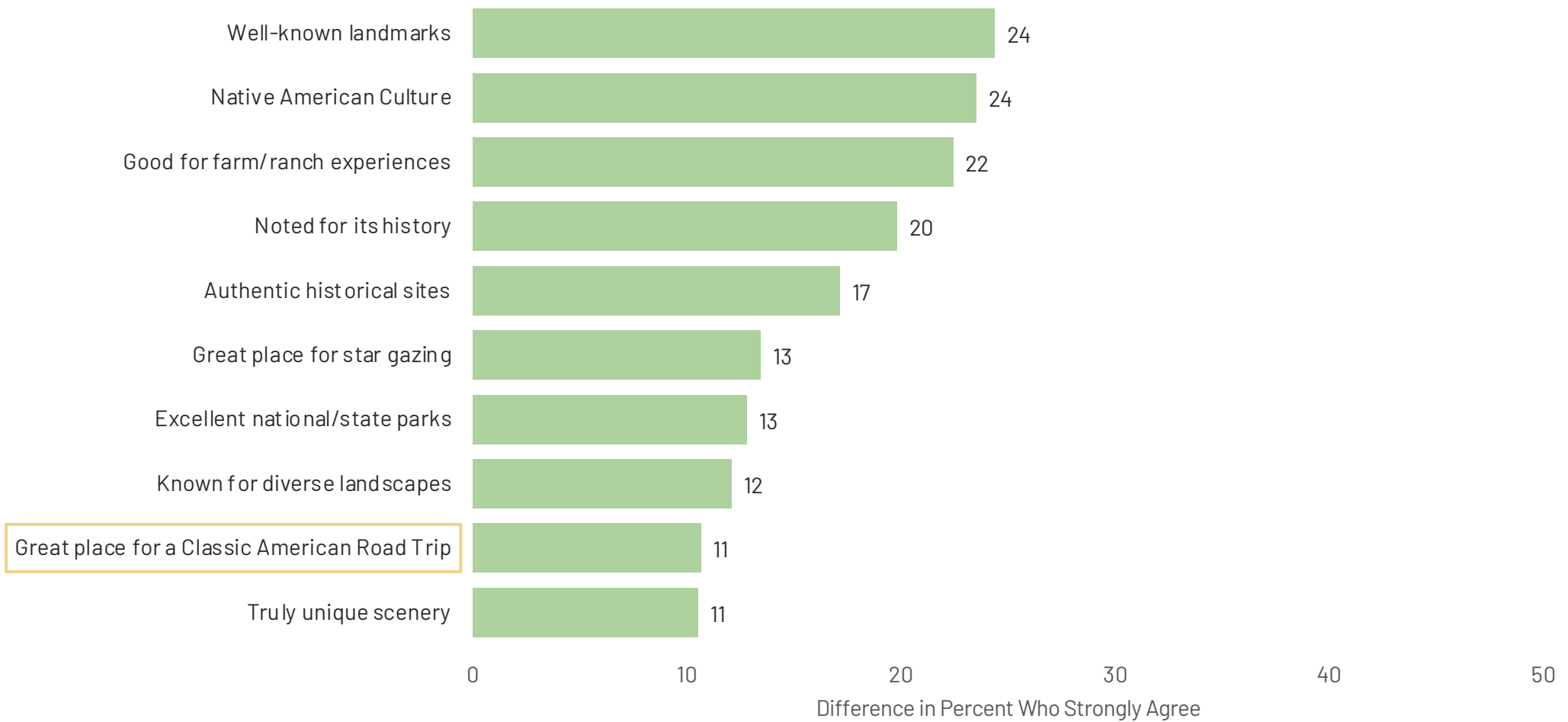
Attribute	Difference in Percent Who Strongly Agree
Well-known landmarks	24
Native American Culture	24
Good for farm/ranch experiences	22
Noted for its history	20
Authentic historical sites	17
Great place for star gazing	13
Excellent national/state parks	13
Known for diverse landscapes	12
Great place for a Classic American Road Trip	11
Truly unique scenery	11

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference in Percent Who Strongly Agree
Good for RV-ing	10
Unique vacation experience	9
Great hiking/backpacking	9
Must-see destination	8
Different cultures/ways of life	6
Vacationing there is a real adventure	5
Great wilderness areas	5
Good to experience by motorcoach	5

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL

SOUTH DAKOTA VS. WYOMING: IMAGE STRENGTHS AND WEAKNESSES

IMAGE STRENGTHS VS. WYOMING

Base: Residents of South Dakota's Regional Advertising Markets

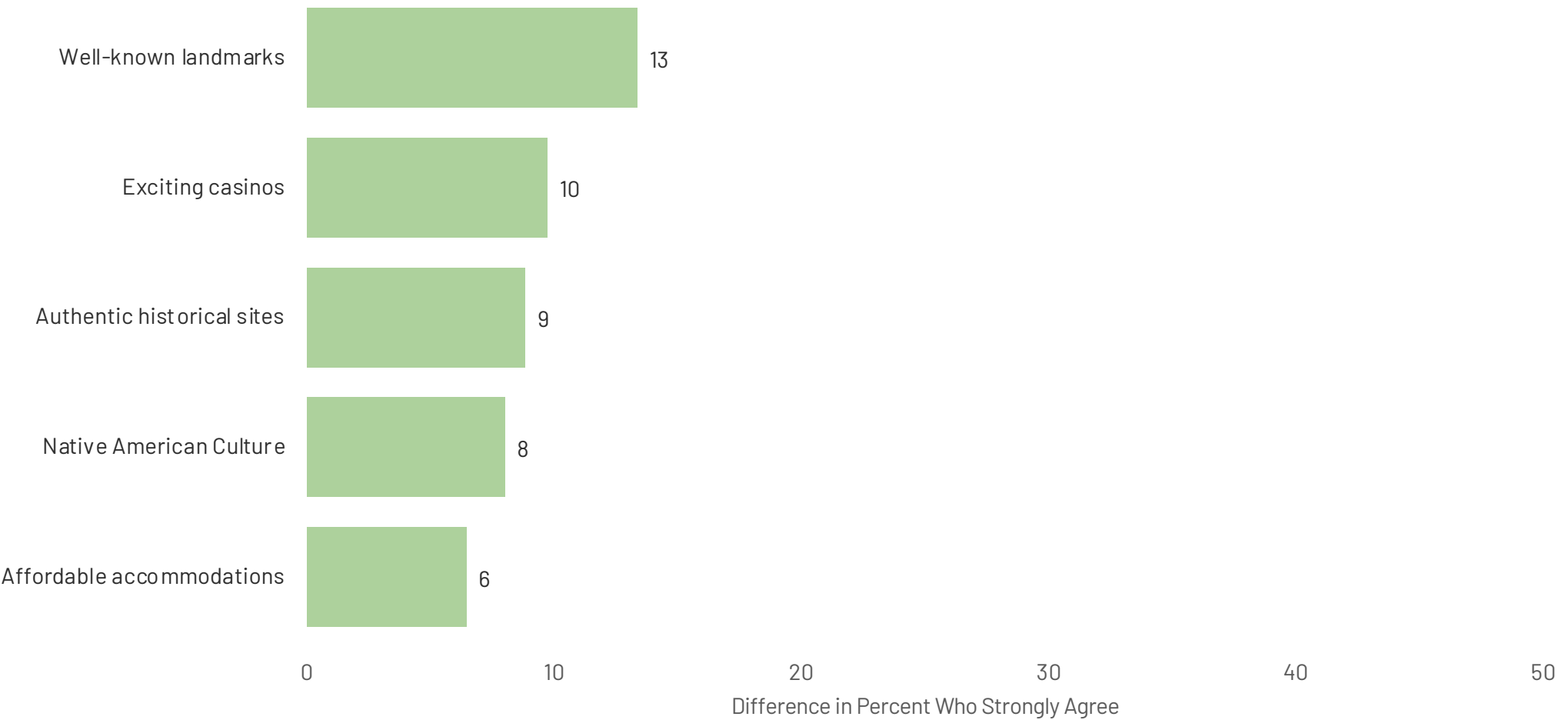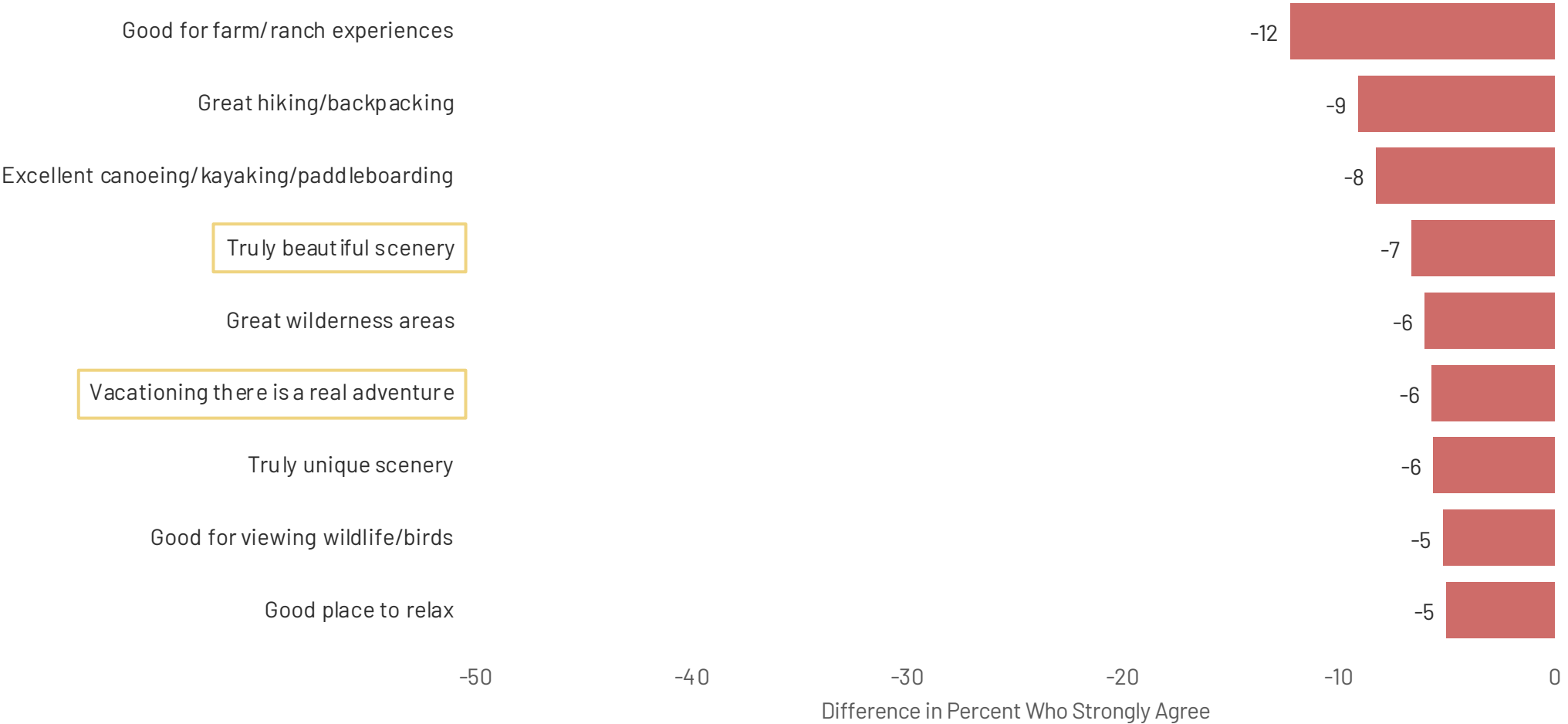Difference in Percent Who Strongly Agree

Category	Value
Well-known landmarks	13
Exciting casinos	10
Authentic historical sites	9
Native American Culture	8
Affordable accommodations	6

Longwoods
INTERNATIONAL

IMAGE STRENGTHS VS. WISCONSIN

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference
Well-known landmarks	27
Native American Culture	26
Noted for its history	22
Authentic historical sites	21
Great place for star gazing	15
Excellent national/state parks	15
Truly unique scenery	12
Known for diverse landscapes	10

Difference in Percent Who Strongly Agree

Longwoods
INTERNATIONAL
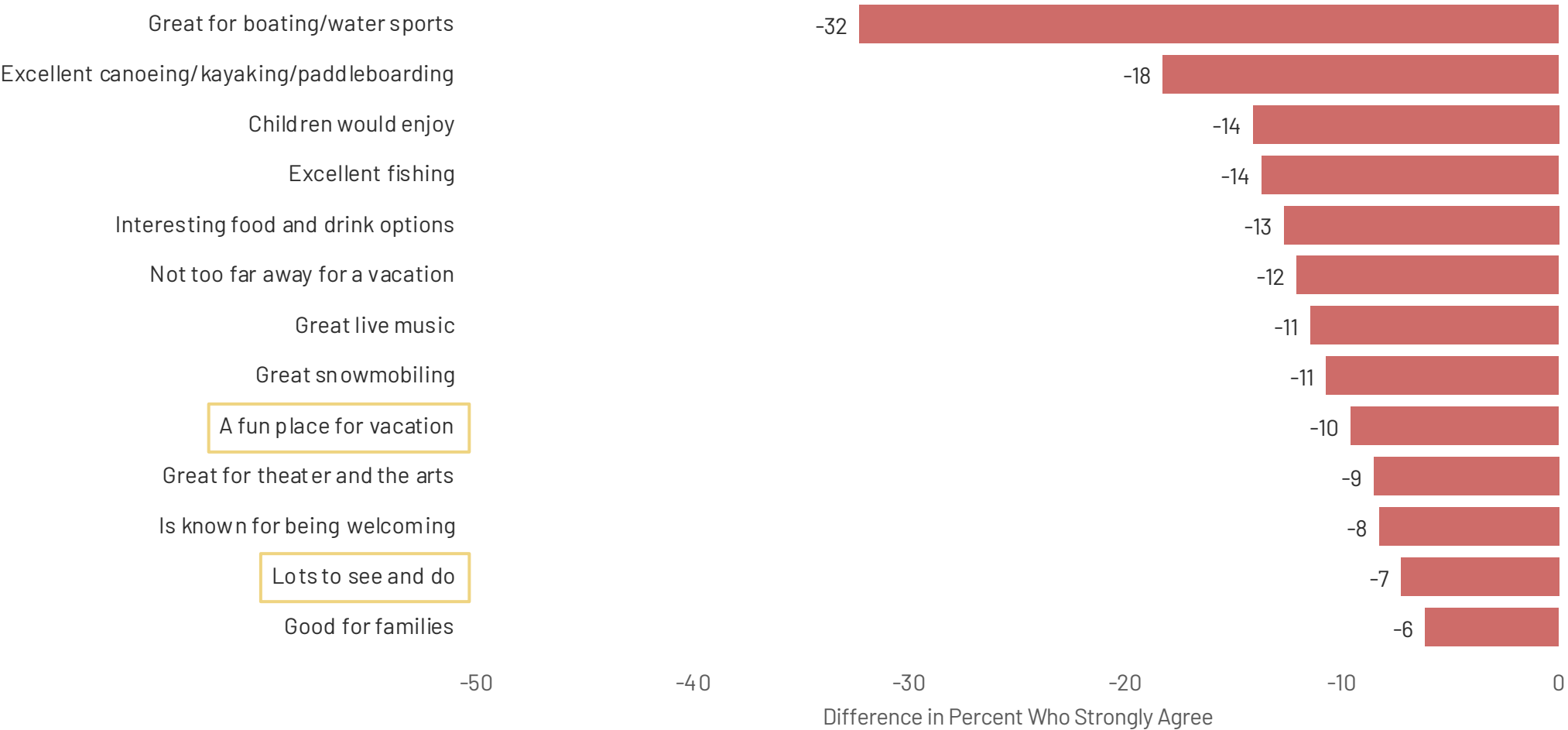
SOUTH DAKOTA VS. MONTANA:
IMAGE STRENGTHS AND WEAKNESSES

IMAGE STRENGTHS VS. MONTANA

Base: Residents of South Dakota's Regional Advertising Markets

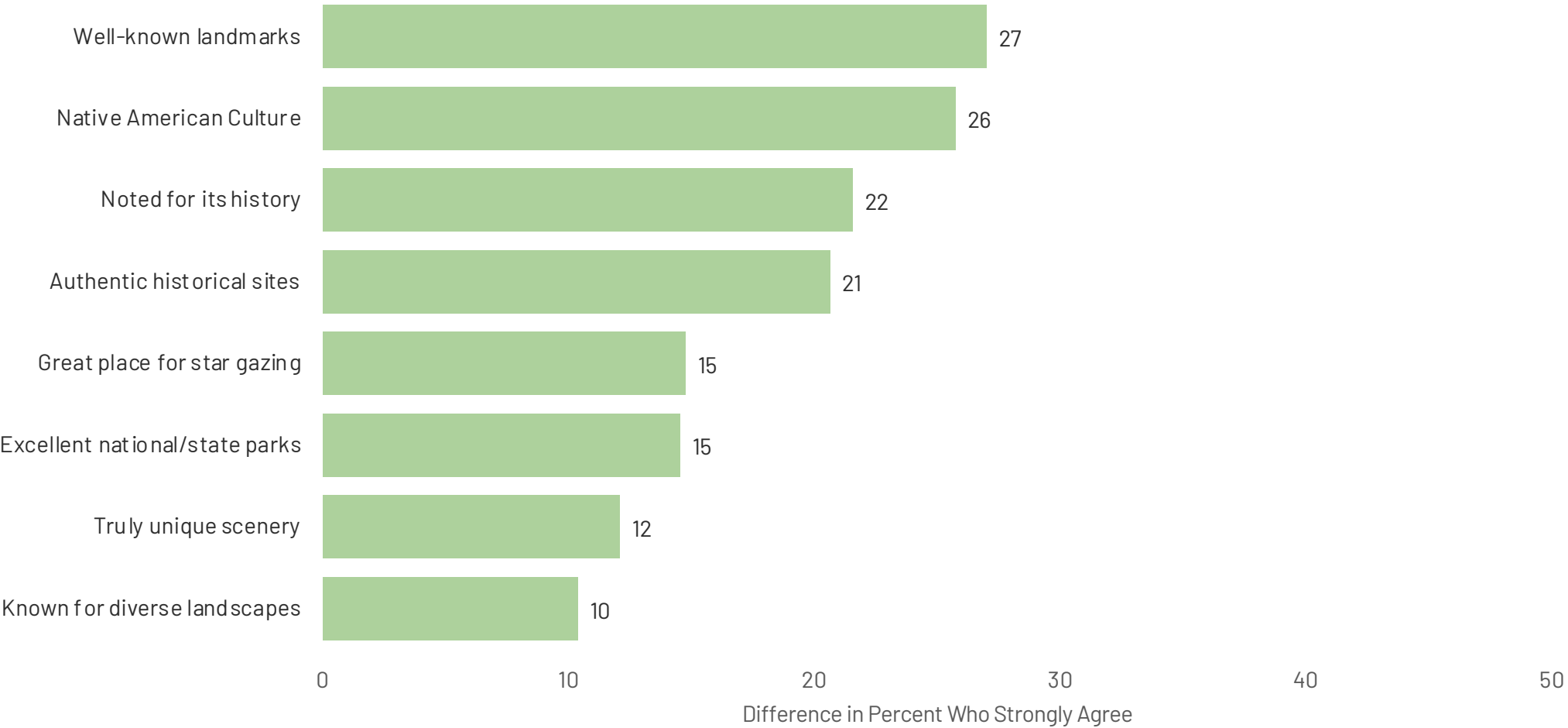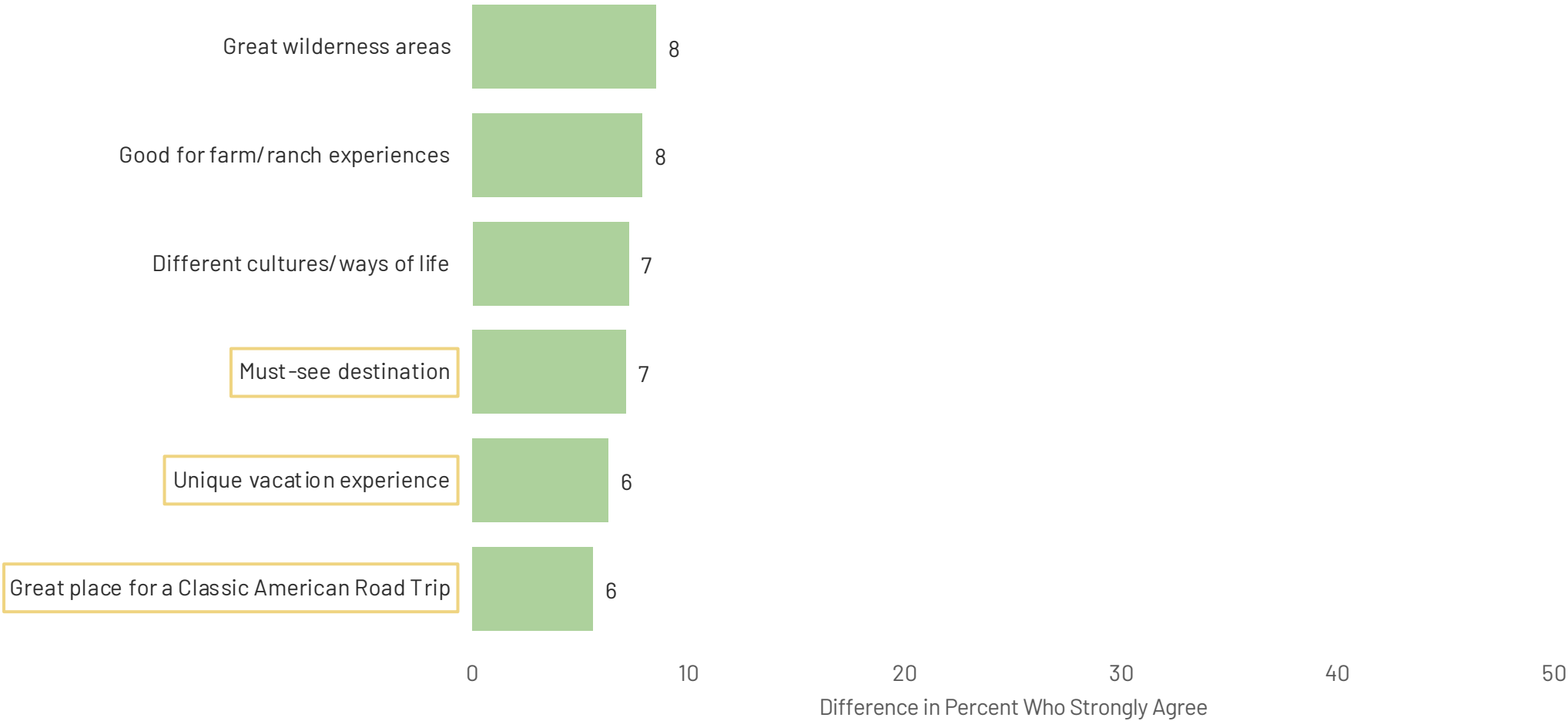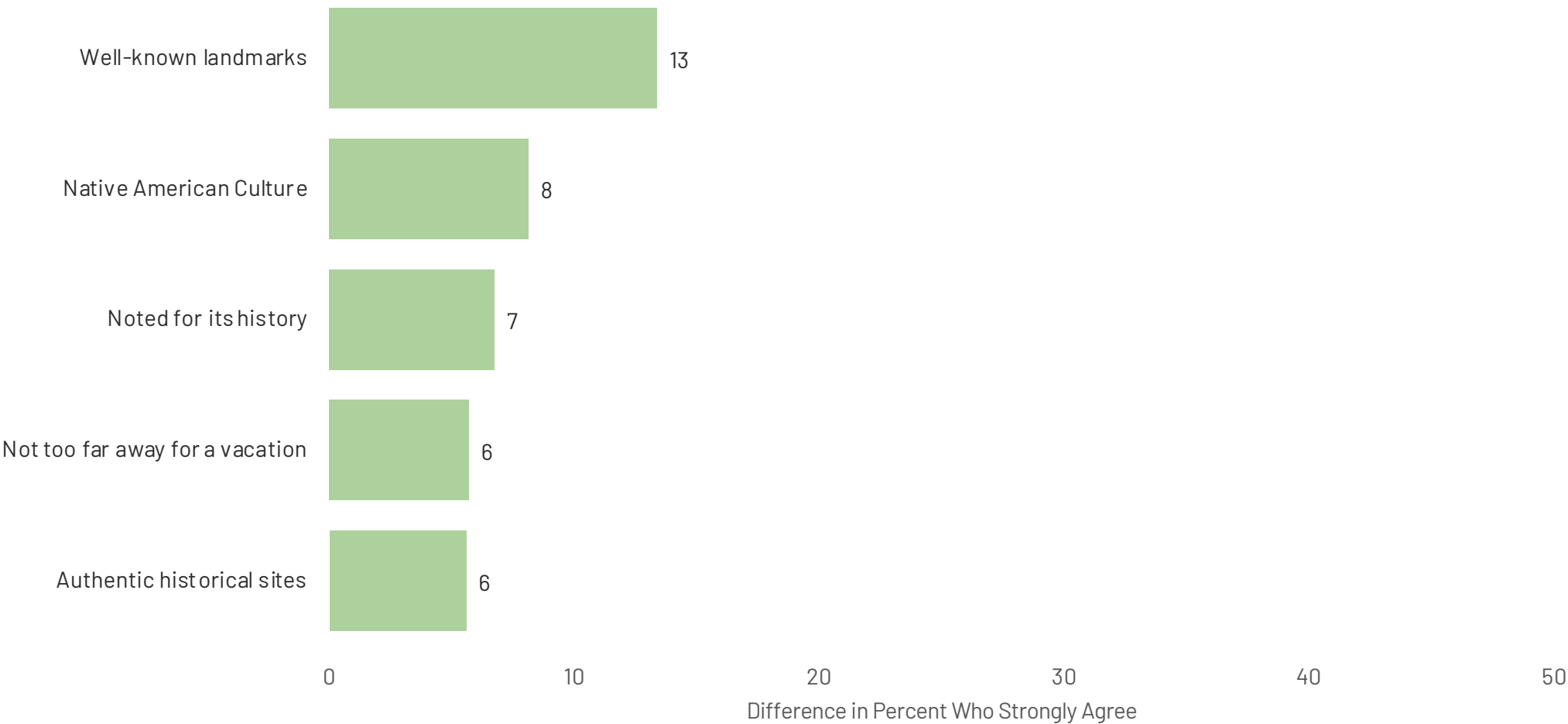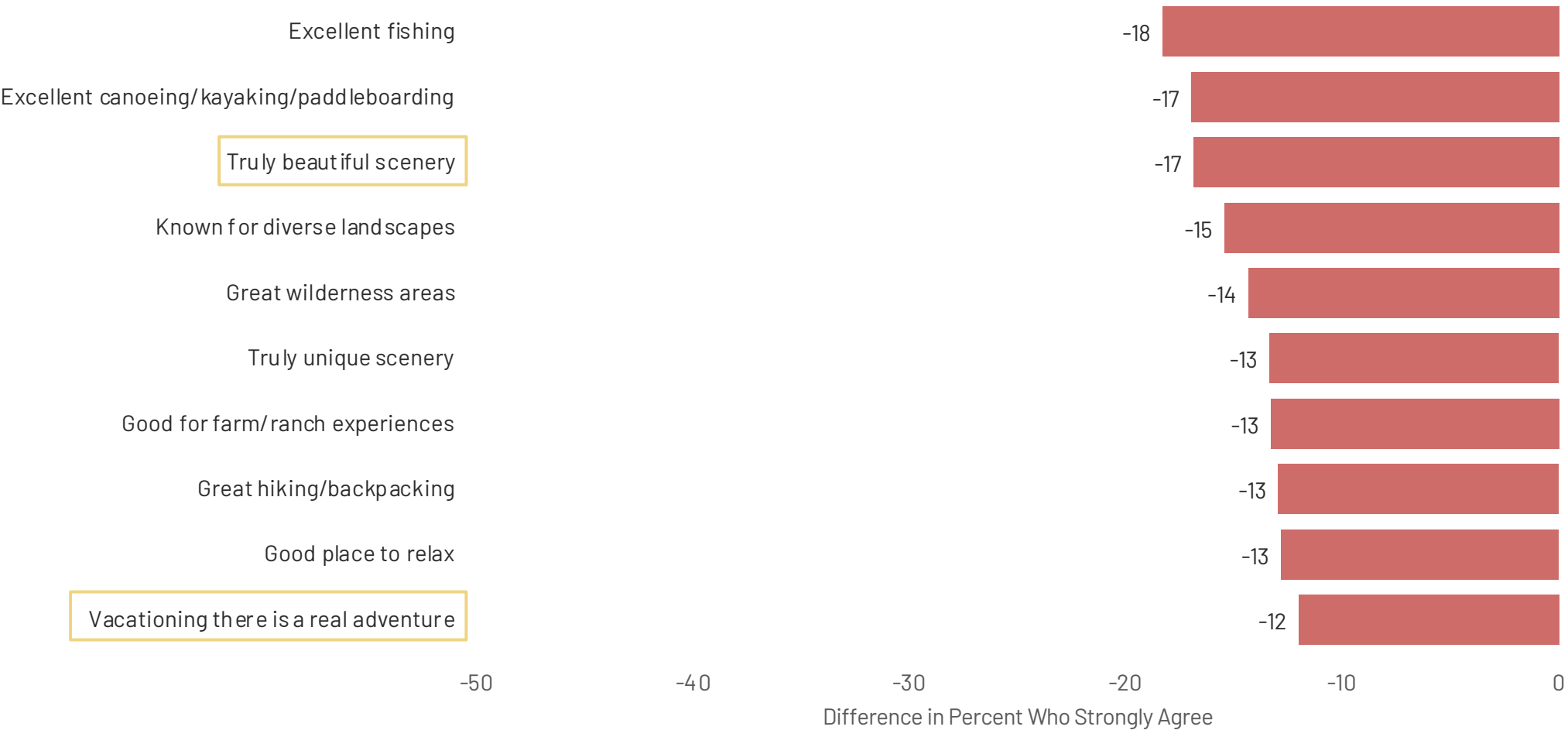Difference in Percent Who Strongly Agree

IMAGE WEAKNESSES VS. MONTANA

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference
Excellent fishing	-18
Excellent canoeing/kayaking/paddleboarding	-17
Truly beautiful scenery	-17
Known for diverse landscapes	-15
Great wilderness areas	-14
Truly unique scenery	-13
Good for farm/ranch experiences	-13
Great hiking/backpacking	-13
Good place to relax	-13
Vacationing there is a real adventure	-12

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL
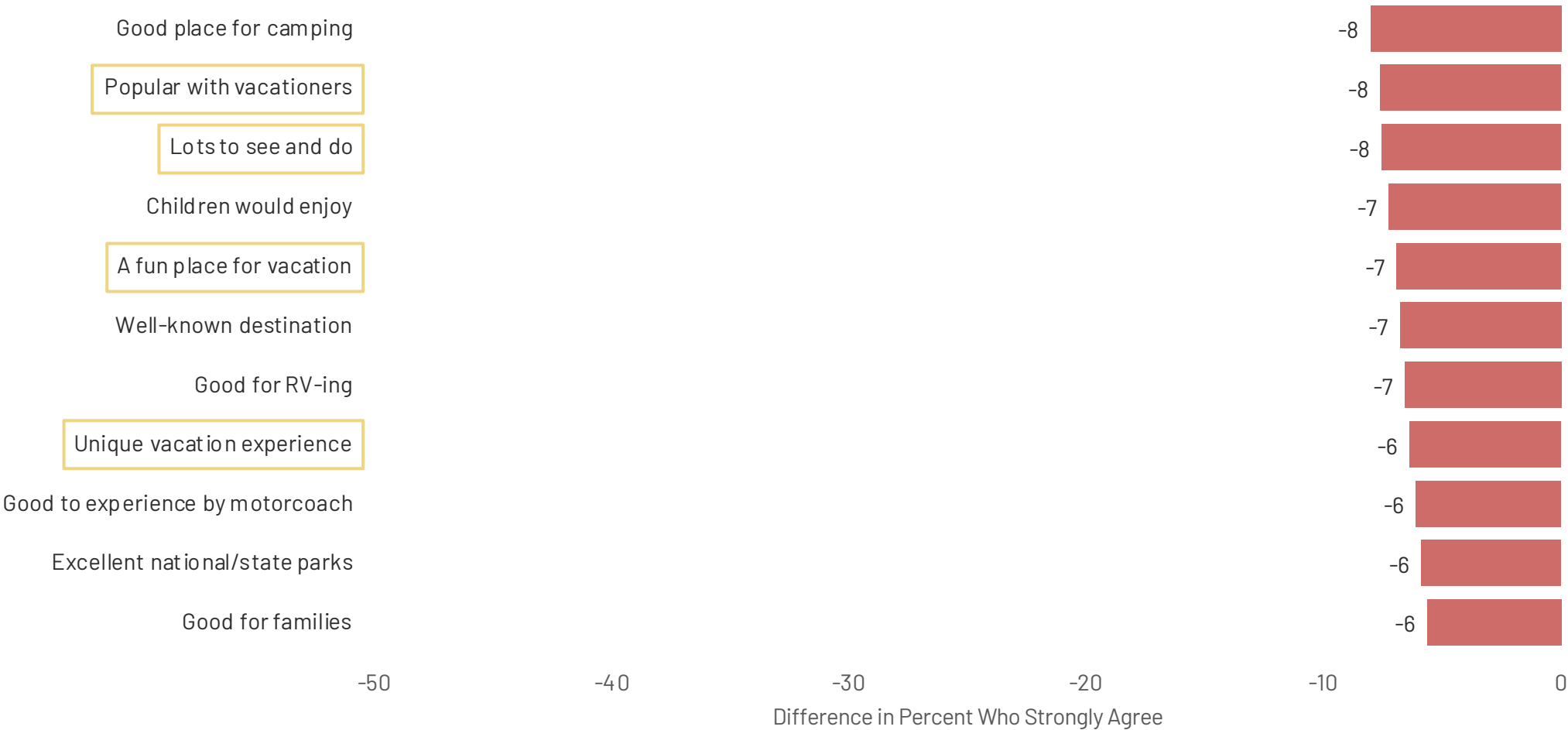
SOUTH DAKOTA VS. TEXAS:
IMAGE STRENGTHS AND WEAKNESSES

IMAGE STRENGTHS VS. TEXAS

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference
Great snowmobiling	43
Native American Culture	25
Great hiking/backpacking	15
Great place for star gazing	14
Great wilderness areas	14
Excellent national/state parks	13
Good place for camping	12
Affordable accommodations	12
Good place to relax	11

Difference in Percent Who Strongly Agree

IMAGE WEAKNESSES VS. TEXAS

Base: Residents of South Dakota's Regional Advertising Markets

Category	Difference
Great live music	-40
Interesting food and drink options	-28
Lots to see and do	-22
Well-known destination	-19
Great for theater and the arts	-18
An exciting place	-16
Great for boating/water sports	-15
Good for farm/ranch experiences	-13
Different cultures/ways of life	-13

Difference in Percent Who Strongly Agree

Hot Button

Longwoods INTERNATIONAL
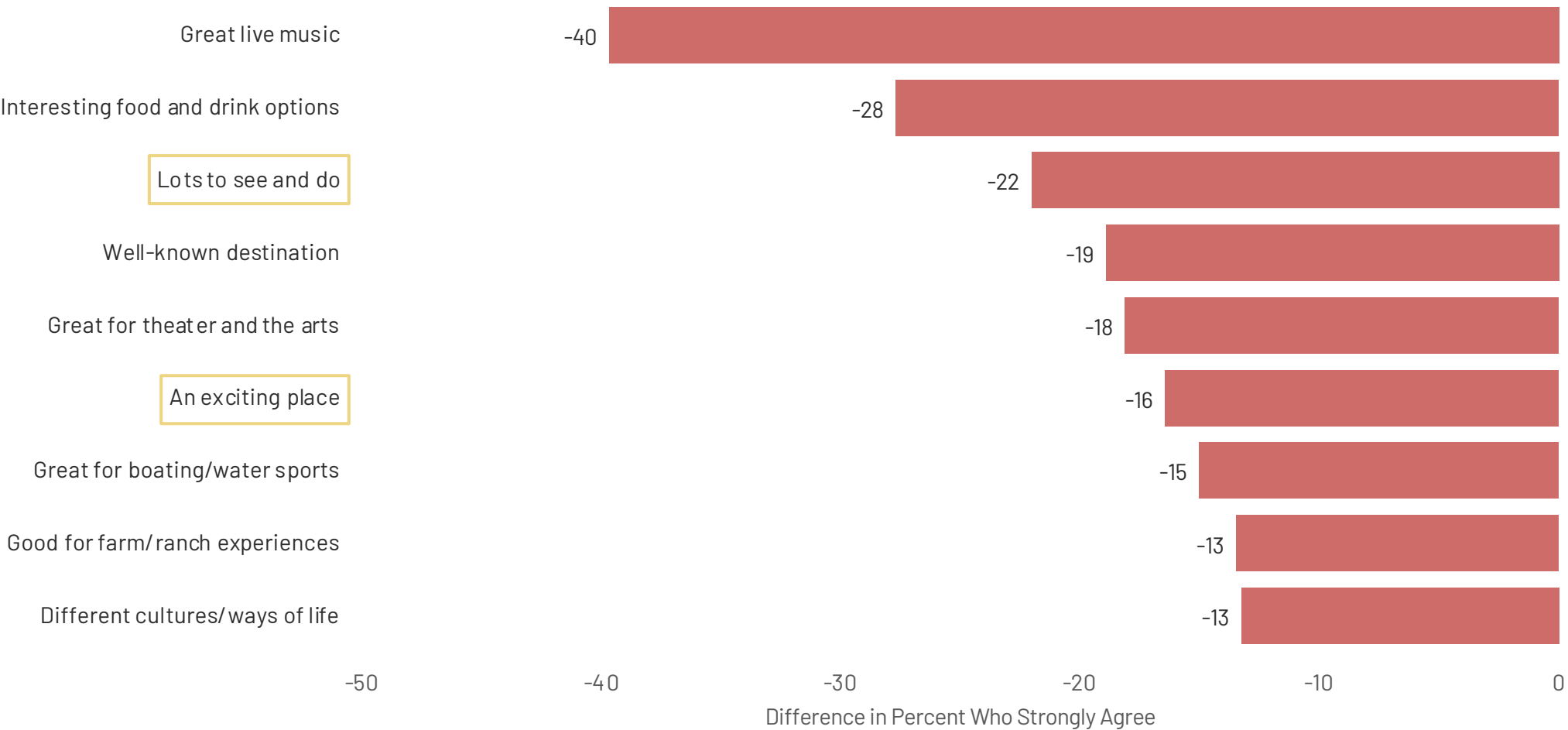
IMAGE WEAKNESSES VS. TEXAS (Cont'd)

Base: Residents of South Dakota's Regional Advertising Markets

Category	Difference in Percent Who Strongly Agree
Noted for its history	-12
Popular with vacationers	-12
Good for adult vacation	-12
I often notice advertising for this place	-10
Authentic historical sites	-9
Children would enjoy	-7
A fun place for vacation	-6

Difference in Percent Who Strongly Agree

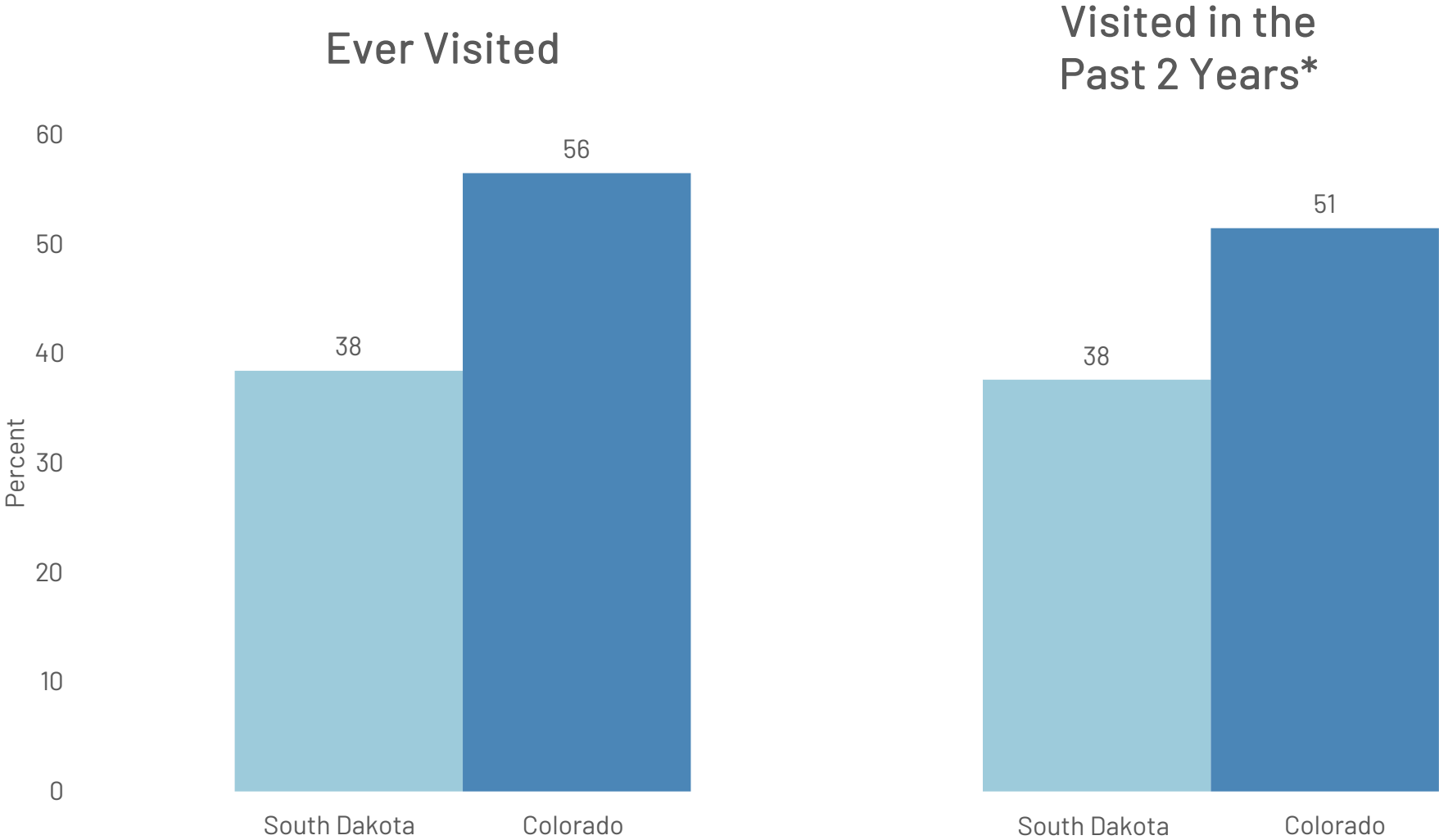Hot Button

Longwoods
INTERNATIONAL
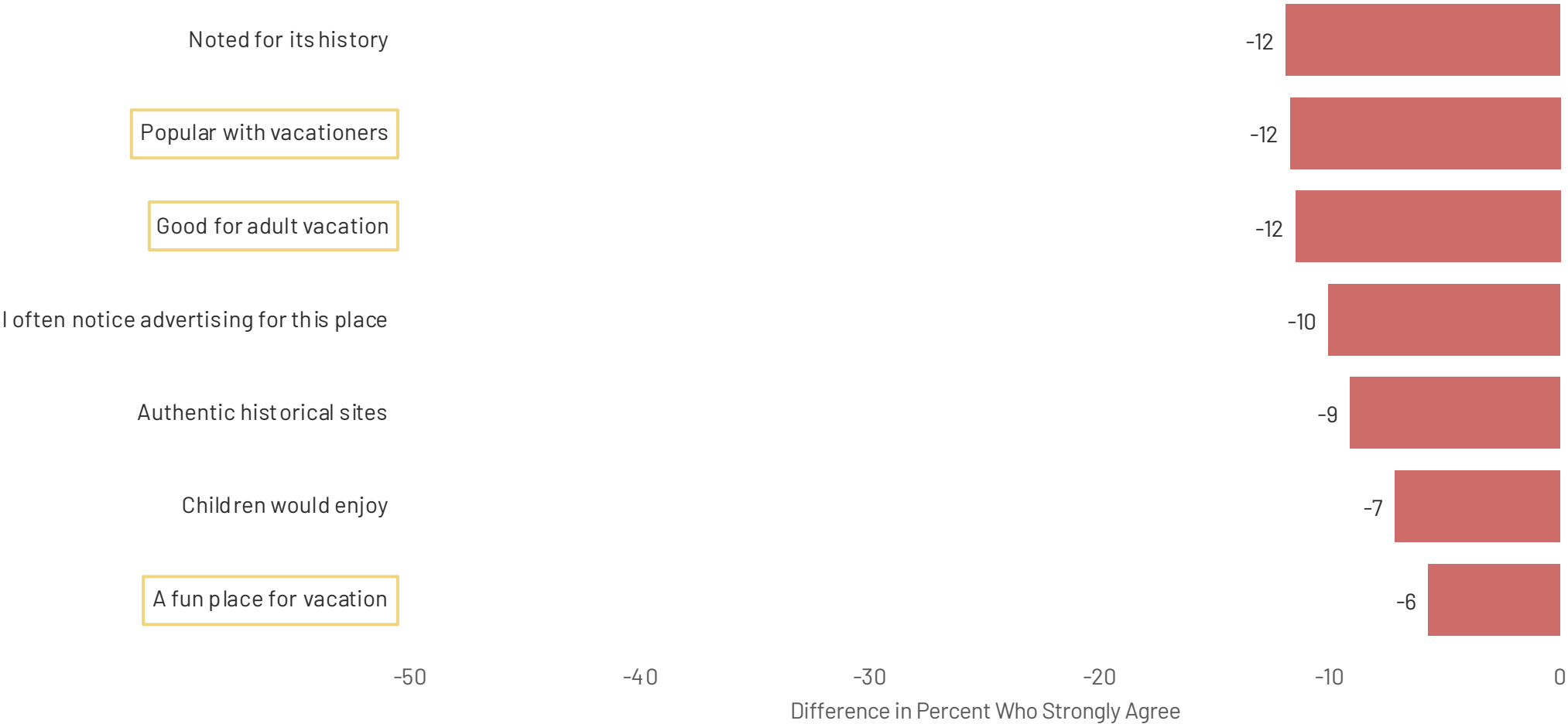
SOUTH DAKOTA VS. COLORADO: IMAGE STRENGTHS AND WEAKNESSES

SouthDakota

PAST VISITATION

Base: Residents of South Dakota's Regional Advertising Markets

Ever Visited

Visited in the Past 2 Years*

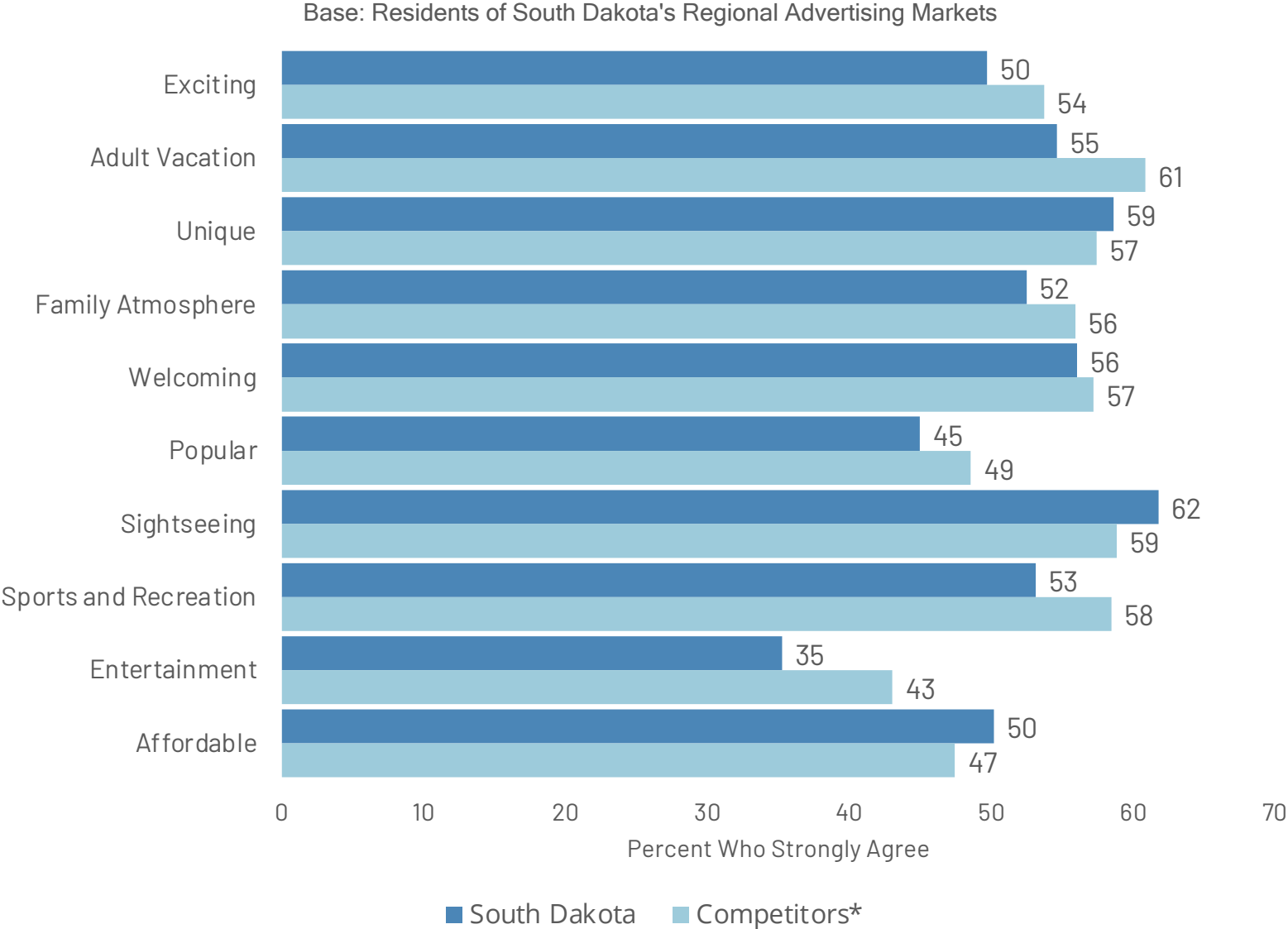*Among those who have ever visited respective destination

INTENT TO VISIT IN NEXT 12 MONTHS

Base: Residents of South Dakota's Regional Advertising Markets
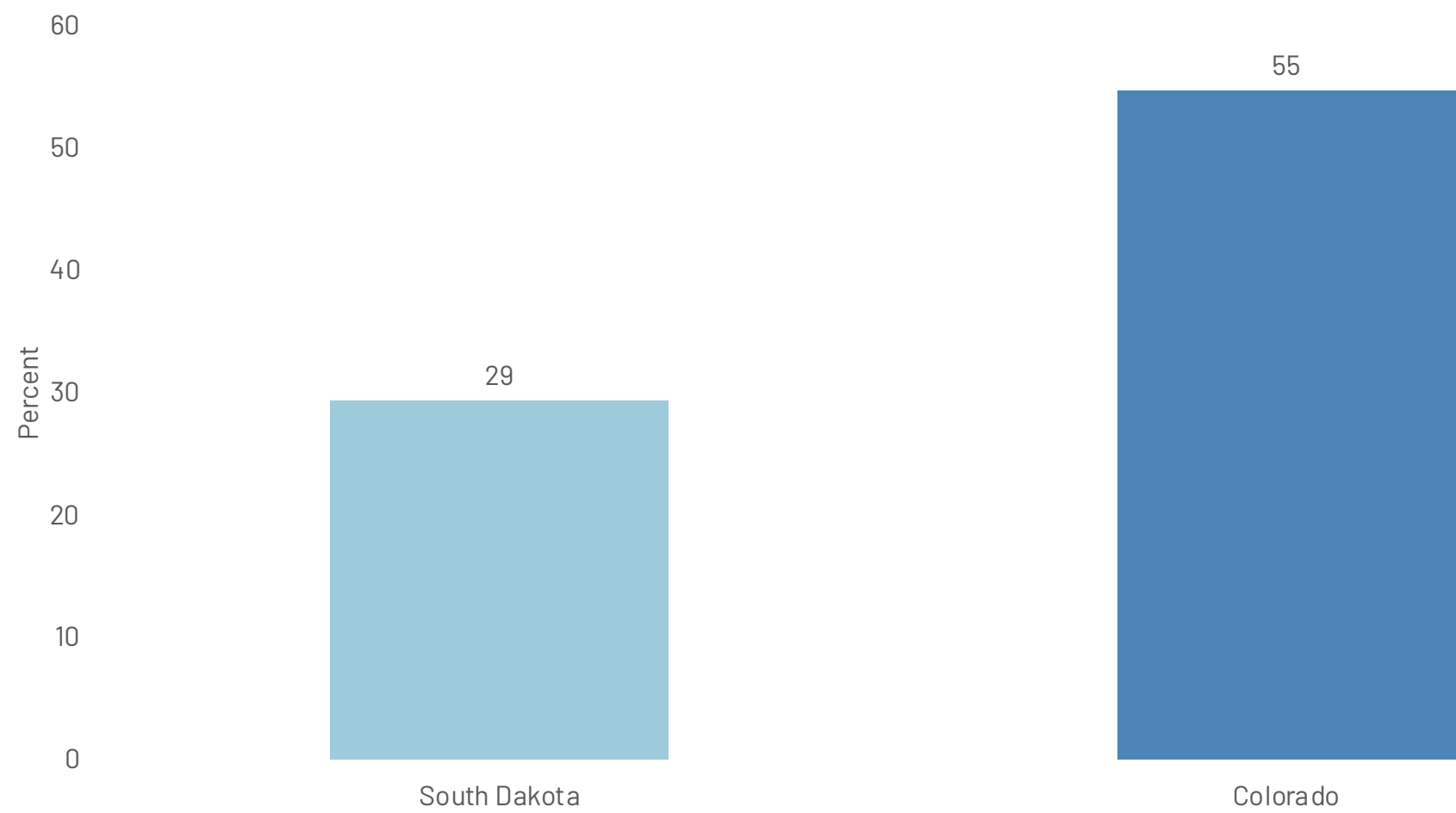
*Respondents who said they would probably or definitely take a trip to each destination in the next 12 months

IMAGE WEAKNESSES VS. COLORADO

Base: Residents of South Dakota's Regional Advertising Markets

	Difference in Percent Who Strongly Agree
Popular with vacationers	-31
An exciting place	-29
Lots to see and do	-28
Well-known destination	-27
A fun place for vacation	-27
Great live music	-26
Excellent canoeing/kayaking/paddleboarding	-24
Good for adult vacation	-24
Vacationing there is a real adventure	-23
Interesting food and drink options	-23
Great for theater and the arts	-22
Great hiking/backpacking	-21

Hot Button

Longwoods
INTERNATIONAL

Base: Residents of South Dakota's Regional Advertising Markets

Attribute	Difference
Great wilderness areas	-12
Excellent national/state parks	-10
Good place for camping	-10
Great place for a Classic American Road Trip	-9
Good to experience by motorcoach	-8
Good for viewing wildlife/birds	-7
Excellent fishing	-7
Good for RV-ing	-6
Is known for being welcoming	-6
Different cultures/ways of life	-5
Not too far away for a vacation	-5
Good for families	-5

Difference in Percent Who Strongly Agree

Hot Button

Longwoods
INTERNATIONAL