South Dakota

Resident Sentiment Study — Final Results
07/08/2025

Why Resident Sentiment?

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Measuring resident sentiment isn't a revolutionary concept, and many states across the country are conducting such studies annually or in some cases quarterly. The value is apparent; knowing what your residents think about tourism and its impact on their communities can assist in talking to stakeholders to keep tourism marketing dollars flowing in, informing marketing messaging, and more.

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With this being the first study of its kind for Travel South Dakota, Love led with a quantitative methodology to provide a bedrock of solid data for future research and decision making, and supplemented it with qualitative insights.

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Given that other studies have been done, Love also gathered public reports from other states and DMO's in a secondary research fashion to inform this study design.

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Research Objectives

Love always roots its market research projects into general research "questions," just as if this was being conducted in an academic fashion.

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Question #1

What is the general sentiment and perceptions of South Dakota residents towards tourists and the tourism industry? More specifically, how do residents perceive the impact that these entities are having on their quality of life across a variety of touchpoints?

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Question #2

How do the perceptions and sentiments measured in research objective #1 compared to the rest of the United States of America (in order to establish comparative baselines for how South Dakota is performing)?
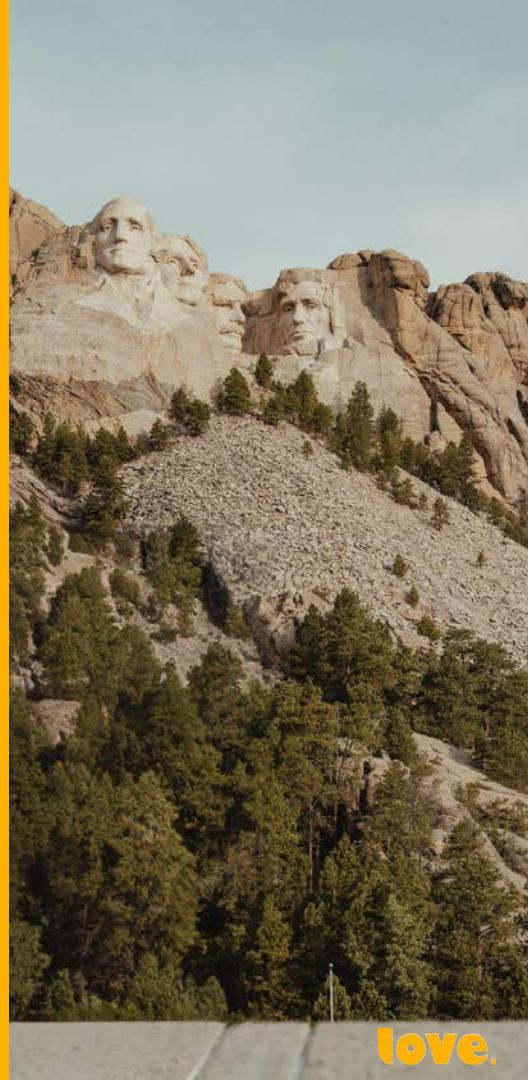
Question #3

What are the main behaviors and experiences that are impacting the general sentiment and perceptions measured in research objectives #1 and #2, and are there any underlying psychographic or demographic correlators to explain the patterns?

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Project Timeline

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By beginning with a quantitative execution that was founded in secondary research of other studies, we were able to have more informed in-depth discussions with residents during the qualitative phase of this project

Survey Design → Quantitative Distribution → Quantitative Analysis → Moderator's Guide Design → In-Depth Interviews → Final Analysis

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Report Overview

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Introduction & Methodology

An overview of sample collection, methodology considerations, data cleaning procedures, and more.

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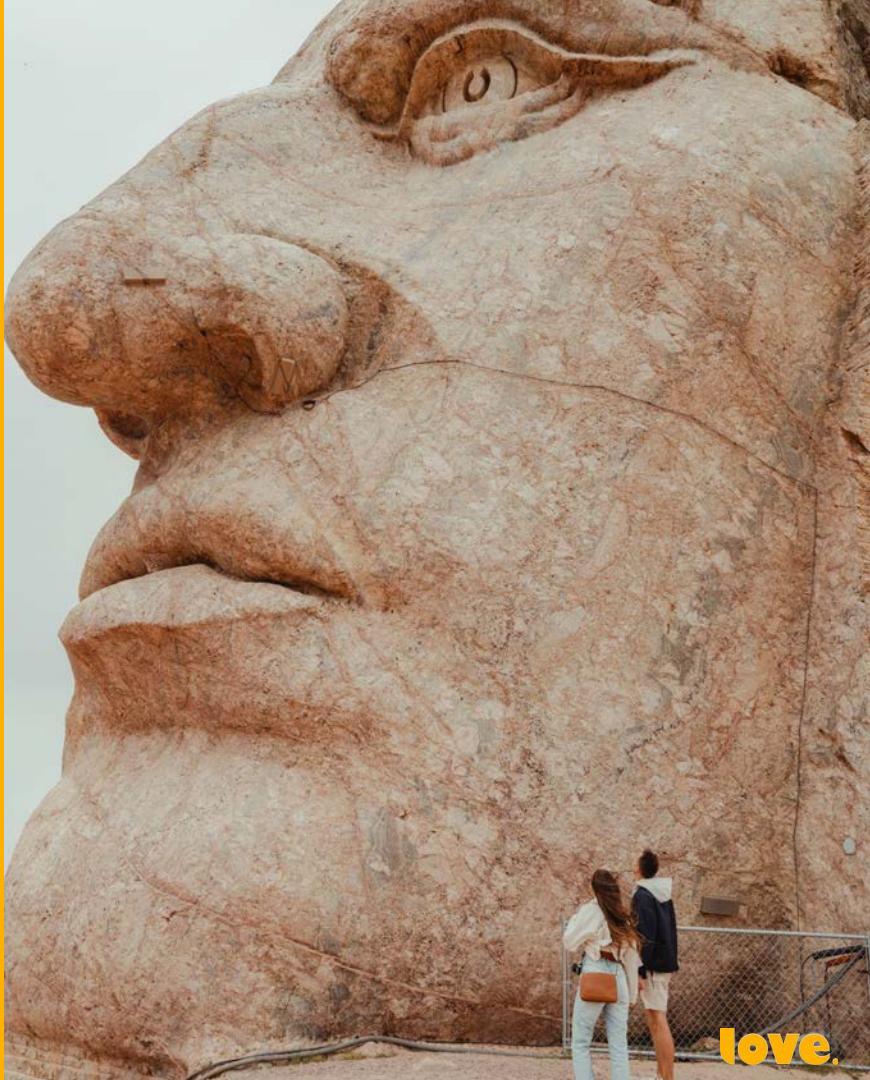
Results & Takeaways

The primary findings of the project, inclusive of an executive summary, that best answer our core research questions and recommendations for future studies.

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Appendix

Additional data points, segmentations, and analyses of interest.

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Introduction & Methodology

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Project Overview

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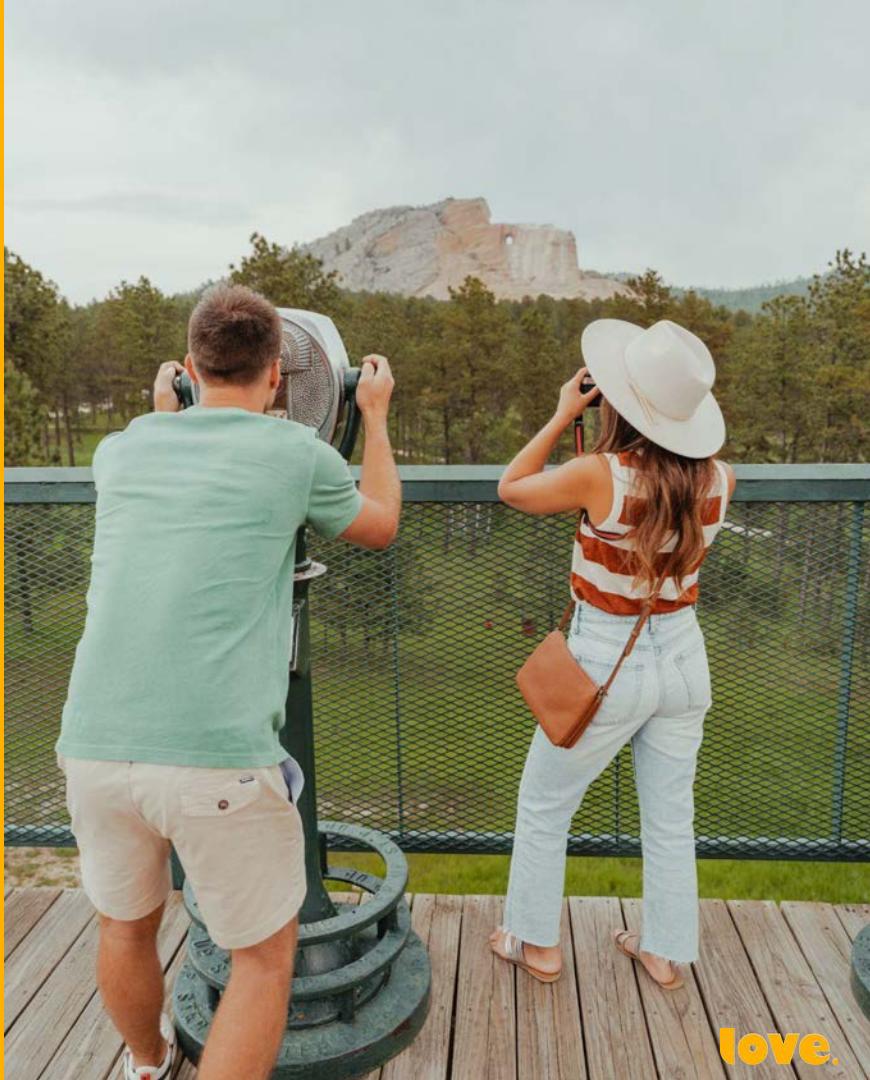
Goal(s)

Understand the general sentiment and perception that South Dakota residents have toward tourism, the relevant impacts it has on themselves and their communities, and how that compares to national averages.

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Markets

1,000 respondents were recruited in the state of South Dakota, and 1,517 were national as a comparative sample. Additionally, six individuals were recruited for one-hour in-depth interviews. All recruitment was done via online paneling with Qualtrics as a partner.

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Audiences

The general population and South Dakota residents were polled, and gender was controlled to be under 60% female and all other demographics were monitored to ensure census-reflective distribution of results. Other demographics were monitored and weighted, but did not have a quota attached to them.

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Some Notes on Methodology

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While the core questions in the study have a good degree of overlap with other studies in the industry (i.e., measuring sentiment in a closed-ended and open-ended fashion, probing statement agreeance across positive and negative aspects of tourism, questions around visitor experience, et cetera), **this study is unique to South Dakota in two ways.**

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First, the collection of a national sample as a comparative data point provides a trove of information around where South Dakota is over or under indexing relative to the average citizen, thus providing context for all learnings and making them more actionable.

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Second, leading with quantitative data collection and ending with qualitative is somewhat out of the ordinary, but provided meaningful context to moderator's guide curation and conducting the discussions with residents.

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Sampling Overview & Quality Assurance

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Sampling

[Online](#) paneling is a common, accurate, and nimble way to collect survey data. As mentioned earlier, more than 2,500 respondents were collected and six in-depth interviews were conducted.

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Cleaning

Love manually scrubs the data to look for response integrity, and employs a variety of other prevention measures to prevent AI bots, low-quality responses, and more from being in the dataset.

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Significance Tests

Last, significance testing is conducted before sampling occurs (to understand confidence intervals) and after to truly understand if the differences observed in the data are real or spurious.

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Results &
Takeaways

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Executive Summary

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Overall, there is more **enthusiasm and awareness toward tourism amongst South Dakota residents compared to the national average.**

- 48% of residents acknowledge that their household income depends on tourism compared to 8% nationally.

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South Dakota residents are **more enthusiastic about their state as a tourism destination and view it as a favorable place to visit** compared to the average United States citizen.

- 85% of South Dakota residents view the state as a desirable place to visit compared to 73% of national respondents' same perception of their own state of residence.
- 20.1 NPS amongst residents vs. 14.4 NPS nationally.

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In general, **there is also a higher level of knowledge of the tourism industry and its various positive and negative impacts amongst residents** compared to the average citizen.

- Cross our economic, environment, and socioeconomic statement agreeance questions South Dakota answered higher with 20 out of 25.

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There is still work to be done in communicating the **direct tax benefits that tourism provides to residents.**

- An 2.5 / 5.0 agreement rating was unearthed amongst residents for the statement "Tourism reduces the amount of taxes that I have to pay," which is lower than the national average of 3.0 / 5.0

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However, there is a higher level of knowledge on **how impactful the tourism industry is to day-to-day life amongst residents.**

- 48% of South dakota residents denoted that their household income, activities, or businesses are impacted by tourism compared to 7% at the national level.

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South Dakota residents are very aware that **visiting at times when the state is less crowded is an important behavior to follow to be more responsible with tourism** compared to the nation.

- 67% of residents say that "Visiting during times when there are less visitors in the destination to avoid overcrowding" is important vs. 35% nationally.

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In the open-ended data, South Dakota residents were more likely to use the terms "local," "help," and "community" compared to the national sample, and the overall sentiment is that **residents have a higher level of awareness on how tourism impacts their specific communities relative to the national average.**

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During the in-depth interviews, the most commonly mentioned topic was around one negative aspect of tourism, and it was that it brings **more trash, litter, and overall messiness to their communities.**

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Each in-depth interview participant noted that they felt **tourism had a net positive impact on the state and their community as a whole however.**

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National Sample Distribution

U.S Sample: 1,516n
South Dakota Sample: 1,000n

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Our national sample is distributed across the United States, and will be used as a comparative baseline for how South Dakota is performing in terms of resident sentiment toward the tourism industry.

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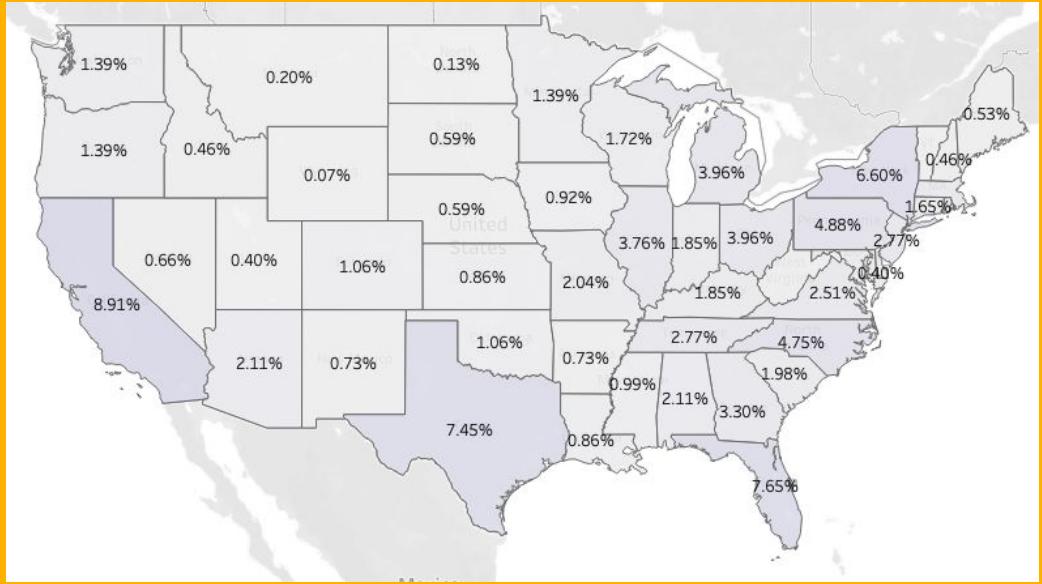
South Dakota County of Residence

South Dakota Sample: 1,000n

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We had a good representation of respondents across the state of South Dakota. Additionally our in-depth interviews had three participants from Sioux Falls, two from Rapid City, and one from Brookings.

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You just mentioned that you live in South Dakota. What county do you currently live in?

County	% of Respondents
Pennington	3.3%
Custer	2.9%
Brown	2.7%
Lawrence	2.7%
Minnehaha	2.7%
Lake	2.5%
Buffalo	2.4%
Hughes	2.4%
Jones	2.1%
Lincoln	2.1%
Meade	2.0%
Hyde	1.9%
Butte	1.8%
Hamlin	1.8%

County	% of Respondents
Jackson	1.8%
Potter	1.8%
Spink	1.8%
Union	1.8%
Brookings	1.7%
Clay	1.7%
Brule	1.6%
Fall River	1.6%
Lyman	1.6%
Moody	1.6%
Perkins	1.6%
Clark	1.5%
Marshall	1.5%
Miner	1.5%

County	% of Respondents
Roberts	1.5%
Sully	1.5%
Yankton	1.5%
Hutchinson	1.4%
Todd	1.4%
Turner	1.4%
Beadle	1.3%
Grant	1.3%
Gregory	1.3%
Hanson	1.3%
Kingsbury	1.3%
McCook	1.3%
Oglala Lakota	1.3%
Other	25.8%

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Gender

We ultimately ended up with a sample that actually skewed male versus female, something we don't normally see in survey research (but was weighted down in the aggregate results to be a 50/50 split). In the IDI's, we had four females and two males.

What is your gender?

■ South Dakota Sample ■ National Sample

	Male	Female
South Dakota Sample	58.8%	41.2%
National Sample	56.1%	43.9%

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Age
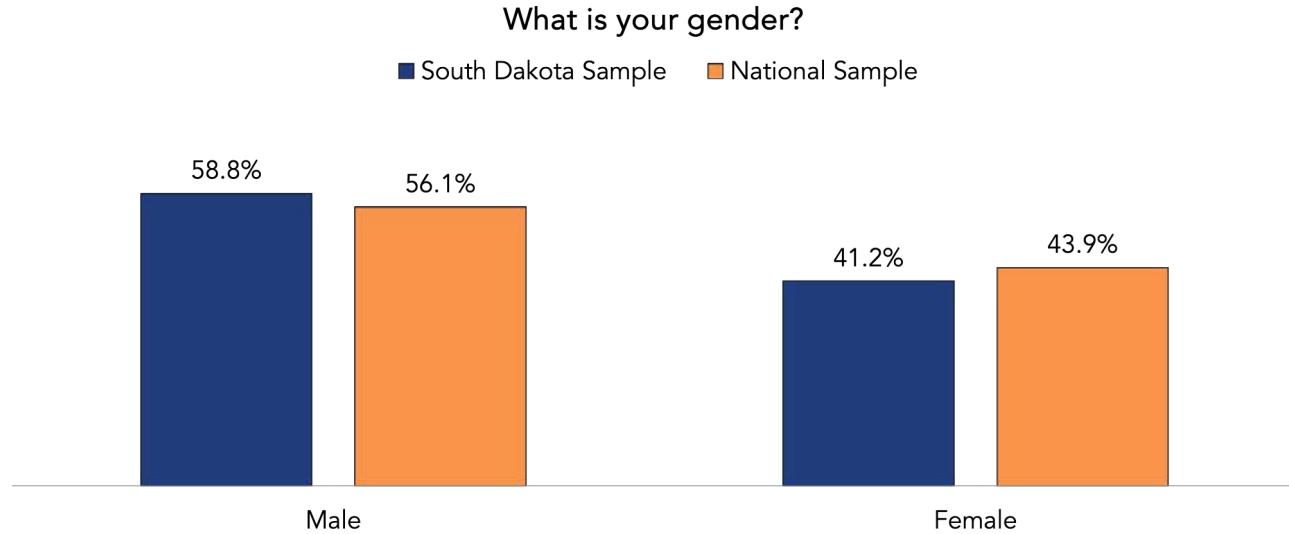
There was a somewhat even distribution of respondents in our two samples; the bulk of responses in both came from those A25–54, but the national sample skewed older with South Dakota skewed younger.

How old are you?

■ South Dakota Sample ■ National Sample

Age	South Dakota Sample	National Sample
Under 18	0.0%	0.0%
18 to 24	19.1%	12.6%
25 to 34	30.1%	28.1%
35 to 44	30.0%	27.7%
45 to 54	16.4%	15.2%
55 to 64	3.3%	12.1%
65 or Older	1.1%	4.3%

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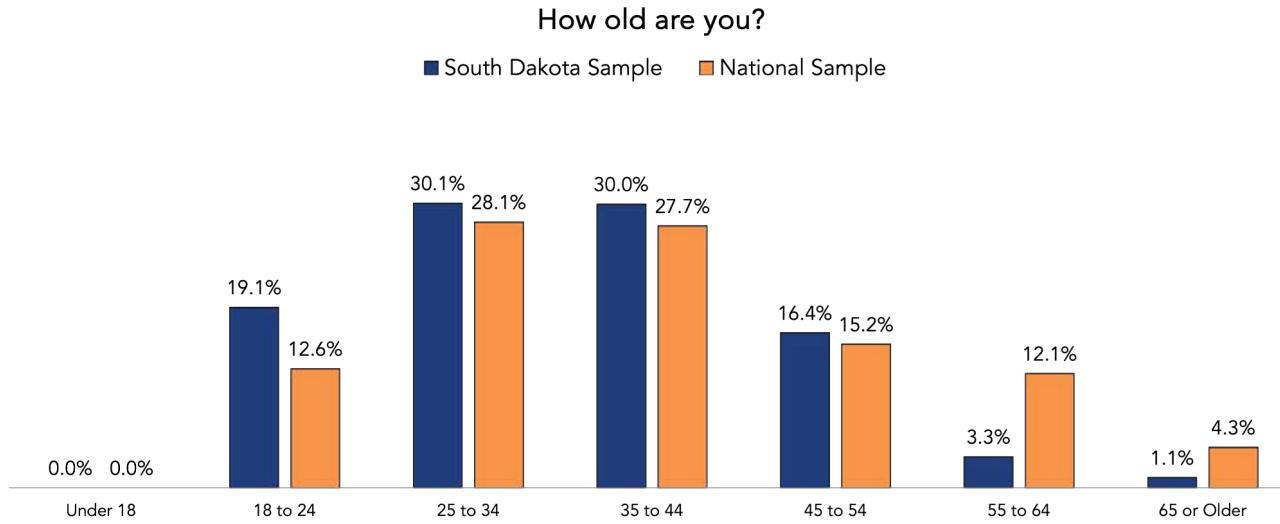
Leisure Trip Propensity

Our South Dakota sample had individuals who were more likely to have taken a leisure trip in the past 12 months, with a median of 2.42 vs. 2.07 at the national level.

How many leisure trips have you taken in the past 12 months? *(i.e., a non-business trip, with an overnight stay somewhere 50 miles from home)*

■ Median # of Trips

2.42

2.07

South Dakota Sample

National Sample

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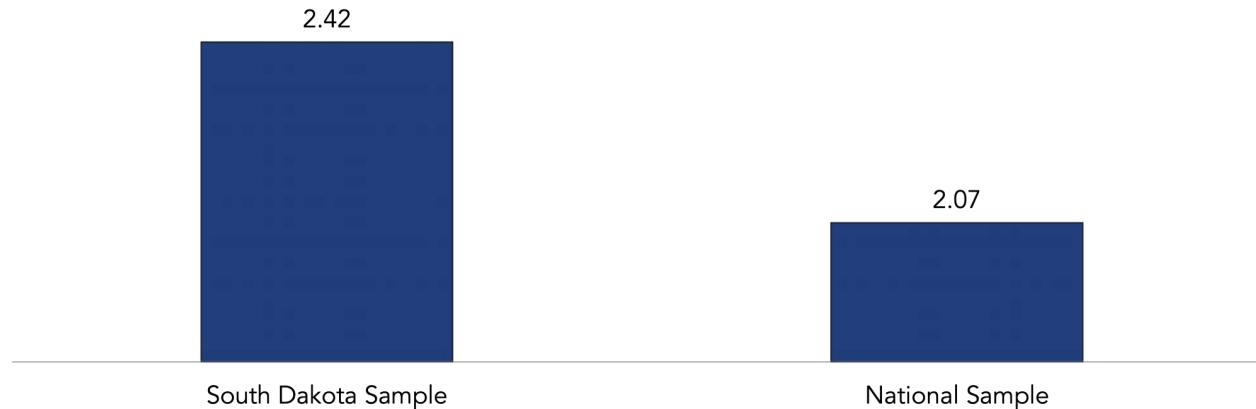
South Dakota Residence

86.6% of our respondents were born in South Dakota, compared to 13.4% who were born somewhere else and later moved into the state. In our in-depth interviews, five of the six participants were born in South Dakota.

Were you born in South Dakota?

■ South Dakota Sample

86.6%

13.4%

I have always lived in South Dakota

I moved to South Dakota

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Those Who Moved to a State

We asked of both samples if they weren't born in their state of residence, how long ago they moved to there, and as you can see it was more common for the national sample to have moved a long time ago.

You just mentioned that you were not born in your state of residence, how long ago did you move there?

■ South Dakota Sample   ■ National Sample

Category	South Dakota Sample	National Sample
1 year ago or less	6.8%	9.6%
1 to 2 years ago	17.9%	6.5%
3 to 5 years ago	34%	9.6%
6 or more years ago	42%	74.2%

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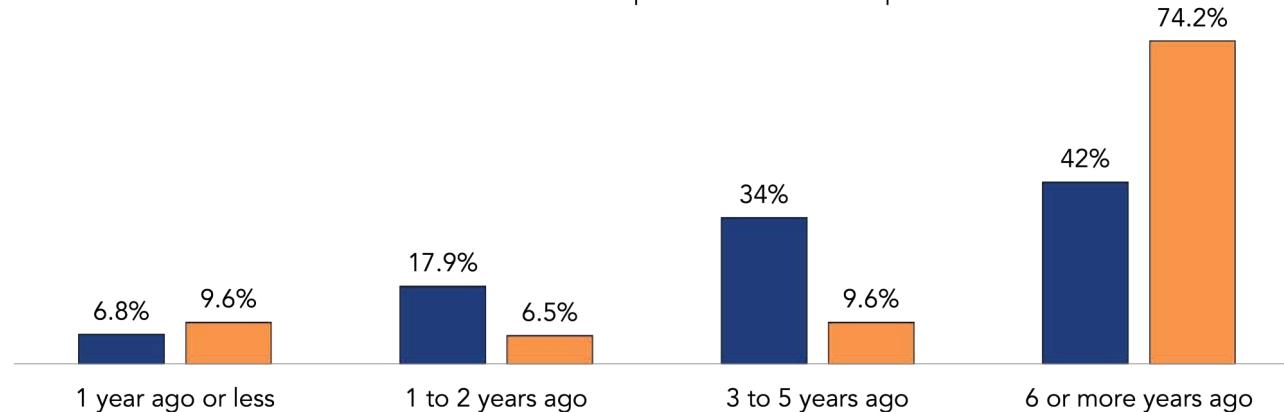
Employment Status

Employment levels were balanced between our two samples which is good for generalizability of results.

Are you currently employed?

■ Yes ■ No

- South Dakota Sample: Yes 91.1%, No 8.9%
- National Sample: Yes 91.2%, No 8.8%

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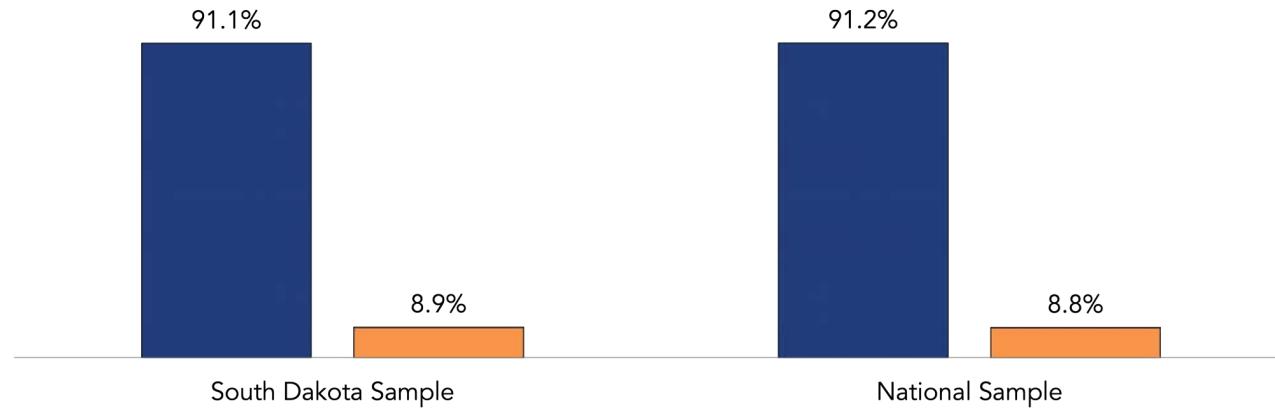
Employment Status Cont.

There was a skew in the national sample to have more individuals that were full-time employed, while the South Dakota sample had a seasonal and temporary skew.

What is your current employment status?

■ South Dakota Sample   ■ National Sample

	South Dakota Sample	National Sample
Full-time employment	53.5%	65.7%
Part-time employment	18.8%	20.7%
Self-employed / independent contractor	19.2%	12.5%
Seasonal employment	5.4%	0.0%
Temporary employment	3.2%	0.5%

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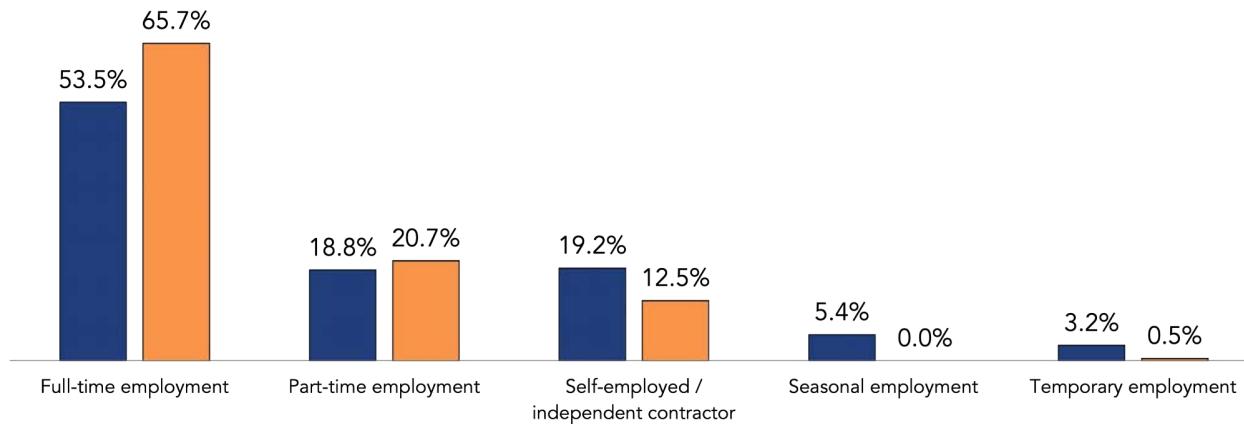
Tourism Industry Representation

One of the most drastic differences in the results was the number of people working in the tourism industry, shown below. This was consistent with our IDI's, as 3 of the 6 individuals noted working in or adjacent to the tourism industry.

Do you currently work in or with the tourism industry?

■ South Dakota Sample   ■ National Sample

	Yes	No
South Dakota Sample	40.7%	59.3%
National Sample	4.5%	95.5%

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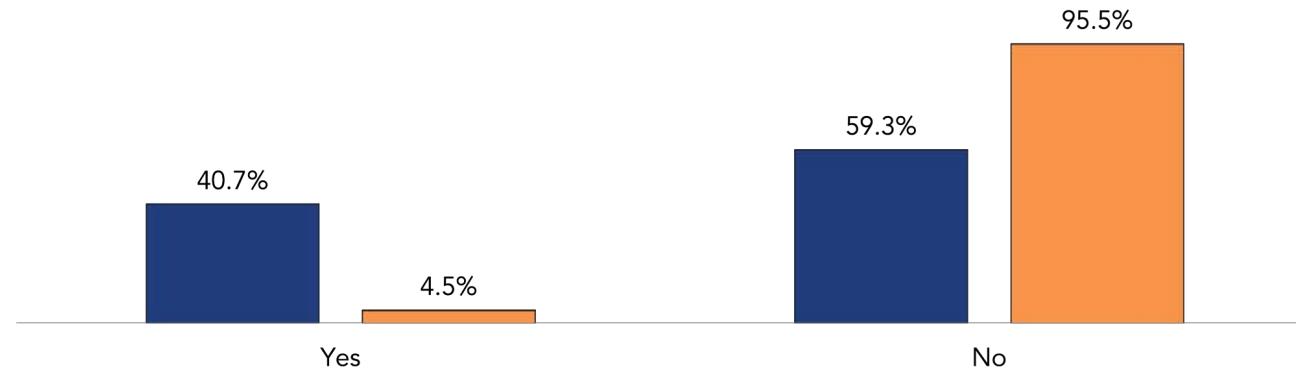
Tourism Industry Employment Type

U.S Sample: 68n
South Dakota Sample: 407n

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In our IDI's two individuals worked for attractions / activities while had worked in accommodations. Another also spent time as a travel agent in the past.

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Which of the following would you say best describes your current place of employment? Please select all that apply.

Employment Type	South Dakota Sample	National Sample
Restaurant / cafe / bar	25.6%	13.9%
Accommodations (i.e., hotels, motels, et cetera)	22.1%	10.8%
Retail and/or shopping	11.6%	21.5%
Spa	11.3%	6.2%
Transportation services	10.3%	10.8%
Vacation rentals (i.e., AirBnB, VRBO, et cetera)	10.3%	18.5%
Tour guide and/or an outfitter	5.4%	7.7%
Professional services	5.2%	12.3%
Attractions and/or activities	4.7%	13.9%
Outdoor recreation areas	3.4%	9.2%
Campgrounds and/or RV parks	3.0%	4.6%
Park (national, state, or otherwise)	2.7%	6.2%
Local tourism office	2.0%	10.8%
Museum and/or a similar cultural institution	1.5%	9.2%

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Business Ownership

As expected, business ownership that specifically serves their states tourism industry was low in both samples.

Do you own a business that currently serves South Dakota's tourism industry in some capacity?

■ South Dakota Sample   ■ National Sample
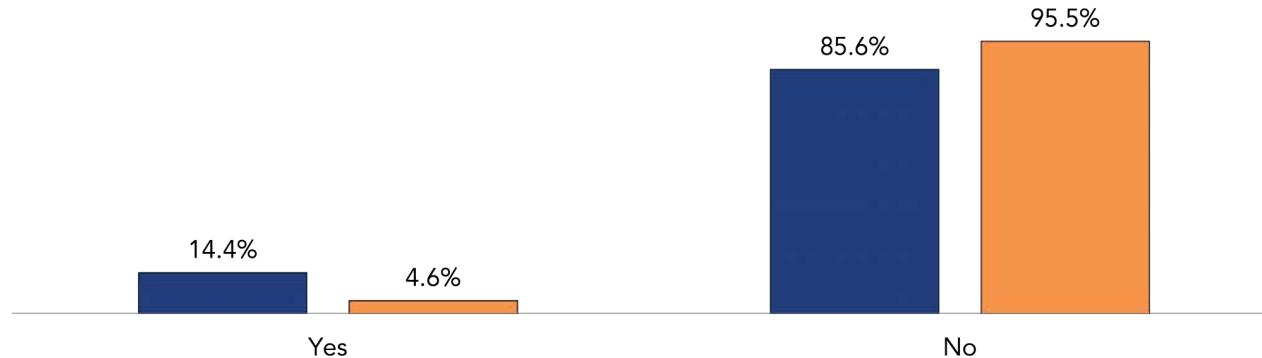
14.4%   4.6%   Yes

85.6%   95.5%   No

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Positive Aspects of Tourism

What would you say some of the most positive aspects of tourism in your state of residence are?

South Dakota Sample

National Sample

love.

Positive Aspects of Tourism Cont.

U.S Sample: 1,516n
South Dakota Sample: 1,000n

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In the open-ended data, South Dakota residents were more likely to use the terms "local," "help," and "community" compared to the national sample.

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In our in-depth interviews, a common theme was that tourism is crucial to maintaining the outdoor parks and environments thereby allowing residents to enjoy them.

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Additionally, all in-depth interview participants felt that South Dakota was "under the radar" but an exceptional place to visit and enjoy.

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Negative Aspects of Tourism

What would you say some of the most negative aspects of tourism in your state of residence are?

South Dakota Sample

National Sample

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Negative Aspects of Tourism Cont.

U.S Sample: 1,516n
South Dakota Sample: 1,000n

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Interestingly, the South Dakota sample made more mention of people specifically, whereas the national sample denoted traffic and cars more often.

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Otherwise, the themes shown in the prior word clouds are consistent with what was found in our in-depth interviews, notably that trash, litter, et cetera are one of the main drawbacks of tourism aside from overcrowding.

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Tourism Statement Agreeance

The core measurement of resident sentiment in this study was broken down into a variety of statements, with the first below being more general in nature. As shown below, South Dakota outperforms the national sample in all statements related to tourism development and enthusiasm for the product. Findings in our in-depth interviews were consistent with below.

How much do you agree or disagree with each of the following statements? (1 to 5 Scale Average Value)

■ South Dakota Sample   ■ National Sample

Statement	South Dakota Sample	National Sample
My state should establish more facilities for tourism	4.1	3.6
My state should strive to become a major tourism destination	4.1	3.6
My state should promote its tourism product(s) more through advertising	4.1	3.8
Development of tourism products should a priority for my state	4.0	3.6
My state should attracting more visitors	4.0	3.7
Tourism should be considered a major priority for my state	3.9	3.6

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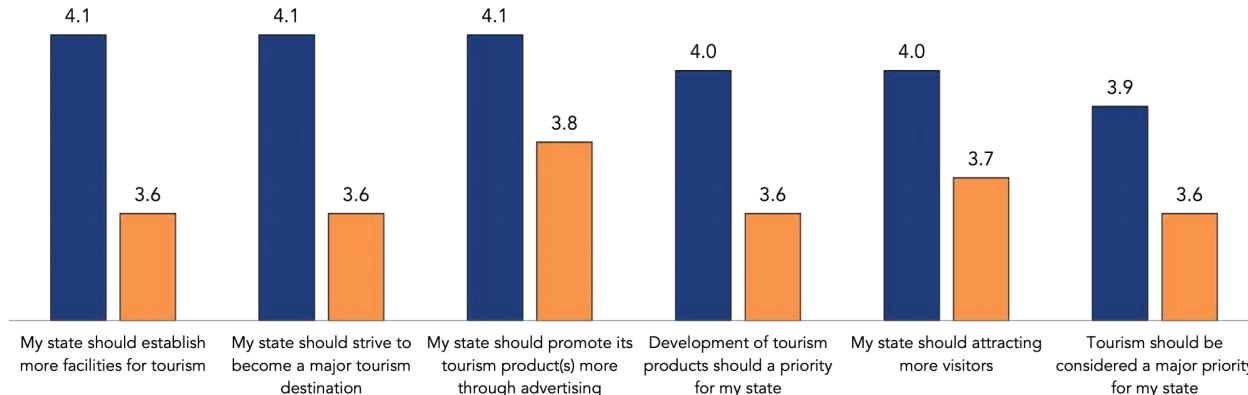
Tourism Statement Agreeance - Economics

The next three slides go in-depth on statements specific to economics, the environment, and the socio economic impacts of tourism.

How much do you agree or disagree with each of the following statements? (1 to 5 Scale Average Value)

■ South Dakota Sample ■ National Sample

Statement	South Dakota Sample	National Sample
Tourism is important for local businesses to succeed	4.3	4.0
Tourism is important to my area's local economy	4.1	3.7
Tourism helps develop the area around me by creating new amenities such as dining options, entertainment,	3.9	3.7
Tourism improves the quality of living in my area	3.8	3.4
Tourism leads to higher income levels in my area	3.8	3.4
Tourism has increased the cost of living in my area	3.6	3.2
Tourism reduces the amount of taxes that I have to pay	2.5	3.0

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Tax Statement Breakout

South Dakota Sample: 1,000n

What we found was that the main correlation on the tax statement question was, generally speaking, education levels and the other segments they are correlated with.

Avg. 1 to 5 Agreement Ranking for "Tourism reduces the amount of taxes that I have to pay."

■ South Dakota Sample

Segment	Value
Non-Employed in Tourism Industry	2.76
A35+	2.66
College Educated (or higher)	2.65
Black Hills & Badlands Region	2.62
Parents	2.6
Glacial Lakes & Prairies Region	2.55
Southeast South Dakota Region	2.53
A18-34	2.51
SD Missouri River Region	2.47
Non-Parents	2.45
Non-College Educated (or lower)	2.41
Employed in Tourism Industry	2.21

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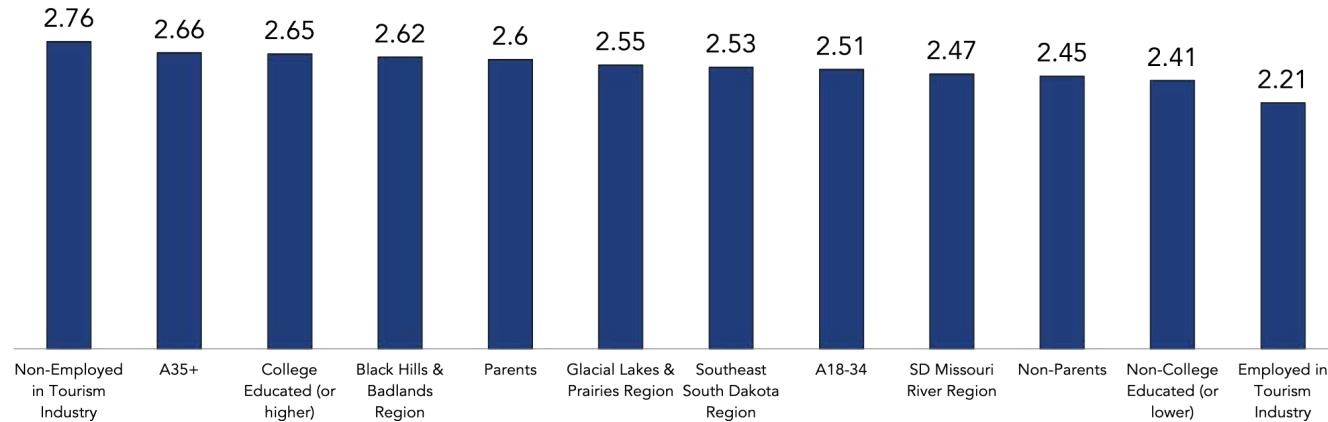
Tourism Statement Agreeance - Environment

How much do you agree or disagree with each of the following statements? (1 to 5 Scale Average Value)

■ South Dakota Sample   ■ National Sample

Statement	South Dakota Sample	National Sample
Tourism is an important source of funding for projects that improve our environment	3.9	3.6
Tourism has resulted in more conservation policies to help protect our parks and wildlife in the area	3.8	3.4
Tourism has improved the condition of our state and national parks	3.7	3.4
Tourism has increased the amount of waste and litter present in our communities and parks	3.4	3.4
Tourism has had a negative impact on our environment (i.e., our parks, communities, et cetera)	2.8	2.9

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Tourism Statement Agreeance - Socioeconomics

U.S Sample: 1,516n
South Dakota Sample: 1,000n

How much do you agree or disagree with each of the following statements? (1 to 5 Scale Average Value)

■ South Dakota Sample ■ National Sample

Statement	South Dakota Sample	National Sample
Tourism has improved my community's image in the media	4.0	3.4
Tourism has led to improved leisure facilities	3.9	3.5
Tourism has increased the quality of recreational and entertainment opportunities in my community	3.9	3.5
Tourism has caused my community to become too crowded	3.1	2.8
Tourism has had a negative impact on the way I go about my life everyday	2.3	2.6
Tourism has made my community less safe	2.3	2.7
Tourism has made our community inauthentic	2.2	2.7

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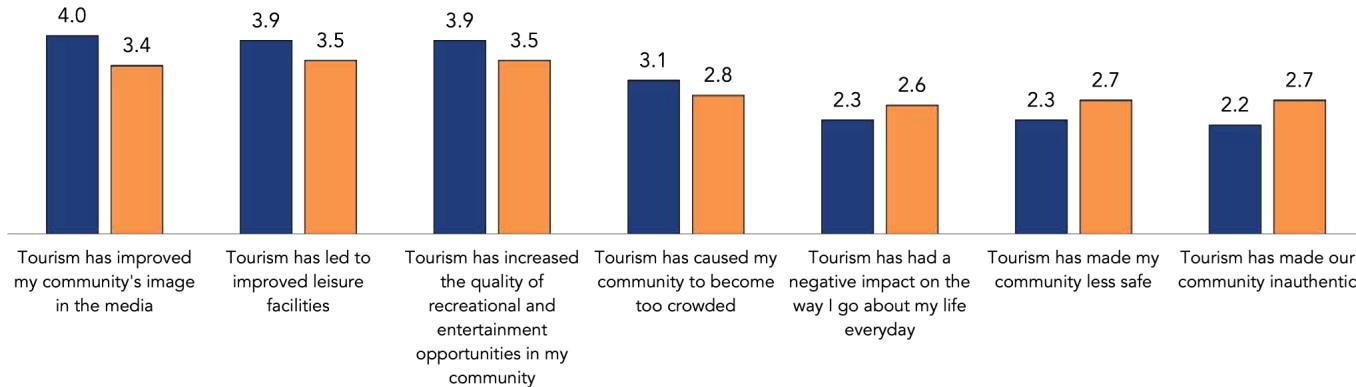
General Opinion of Tourism

Overall, the national sample just skewed a tad more negative in their general opinion of tourism, but by and large, both agreed the positive effects outweigh the negative.

Thinking about tourism across the state you live in, which of the following would you say reflects your opinion?

■ South Dakota Sample   ■ National Sample

	South Dakota Sample	National Sample
The positive effects of tourism outweigh the negative	59.7%	58.9%
The negative effects of tourism outweigh the positive	6.2%	12.1%
The effects of tourism are equally positive and negative	34.1%	29.0%

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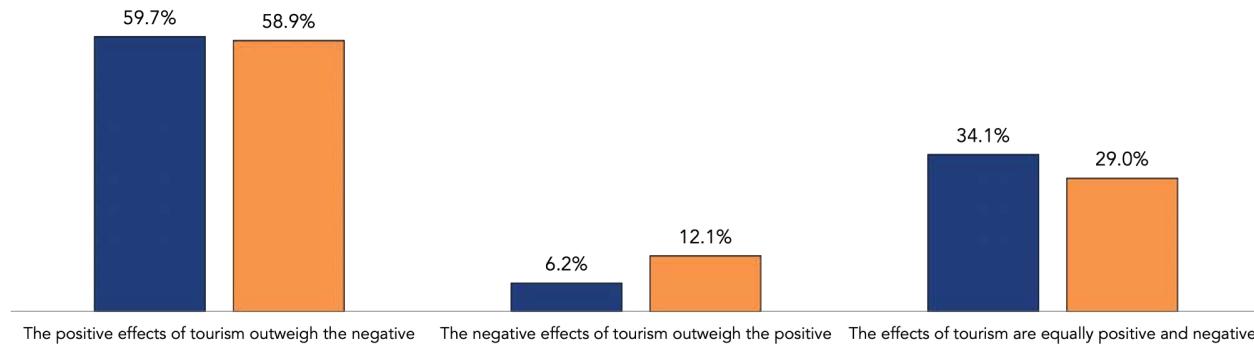
Tourism Experience Perception

The national sample believed that more tourism was coming from out-of-state individuals versus in-state residents, which is not surprising given the breadth of sample and South Dakota's tourism industry being more prominent than the national average.

Do you believe that most of the tourism that your state experiences is coming from residents or out-of-state residents?

■ South Dakota Sample   ■ National Sample

	Residents	Out-of-state visitors	Both about equally	I'm not sure
South Dakota Sample	5.5%	33.8%	56.7%	4.0%
National Sample	14.4%	32.1%	44.1%	9.4%

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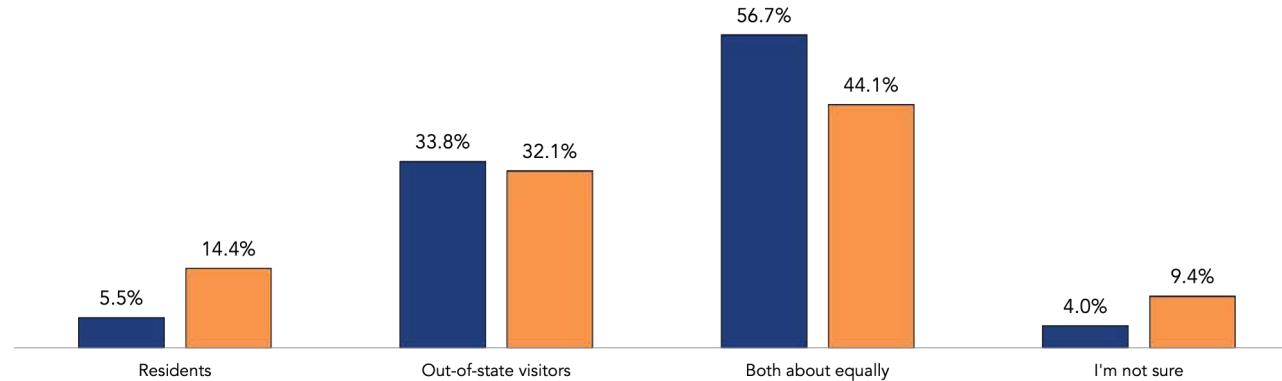
# Responsible Tourism State Office Responsibility

There was a higher propensity for South Dakota residents to agree to the statement "Do you believe that your state tourism office should be responsible for promoting responsible tourism?" This finding was consistent with our in-depth interviews.

Do you believe that your state tourism office should be responsible for promoting responsible tourism?

■ South Dakota Sample   ■ National Sample

	1 - Strongly Disagree	2 - Disagree	3 - Undecided	4 - Agree	5 - Strongly Agree
South Dakota Sample	0.1%	3.1%	8.8%	65.3%	22.7%
National Sample	3.0%	5.7%	19.4%	48.6%	23.3%

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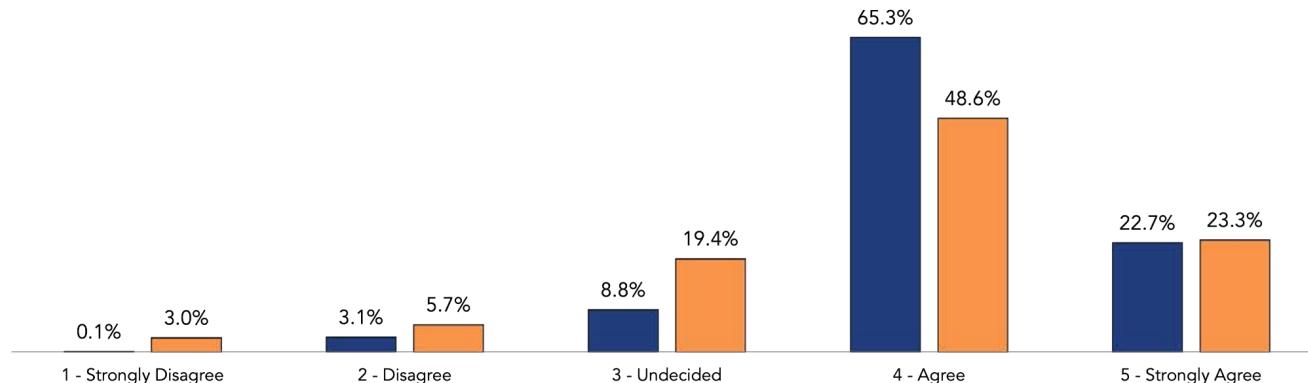
Net Promoter Score

South Dakota's Net Promoter Score was 20.1, which was above the national samples of 14.4. This is calculated by taking the percentage of promoters and subtracting it from the percentage of detractors.

How likely are you to recommend your state of residence as a tourist destination to a friend or colleague?

■ South Dakota Sample   ■ National Sample

| Detractors | Passives | Promoters |
| 13.9% vs. 29.2% | 52.1% vs. 27.1% | 34.0% vs. 43.6% |

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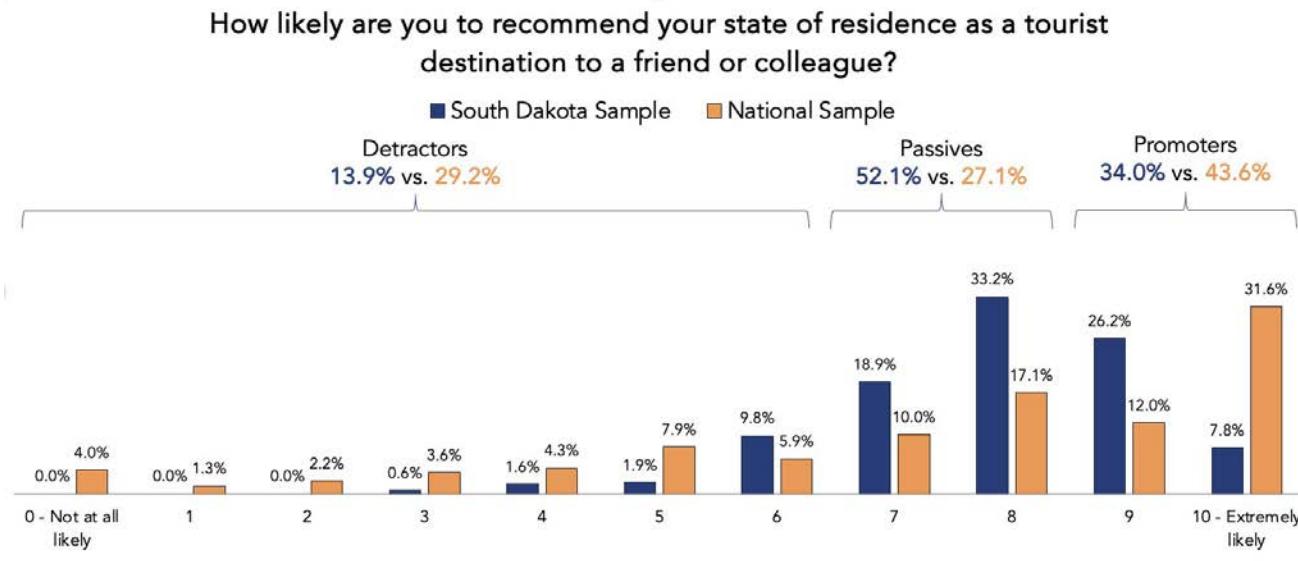
Net Promoter Score Breakdown

South Dakota Sample: 1,000n

Net promoter score broken out by key segments tells a similar story, wherein college education has the highest correlation to recommending South Dakota as a tourist destination.
Young individuals were also very likely.

Net Promoter Score by Segment

■ South Dakota Sample

Segment	Score
SD Missouri River Region	23.9
Black Hills & Badlands Region	23.1
College Educated (or higher)	22.4
A18-34	21.3
Non-Employed in Tourism Industry	21.1
Non-Parents	20.9
Parents	19.5
A35+	18.9
Southeast South Dakota Region	18.7
Employed in Tourism Industry	18.7
Non-College Educated (or lower)	17.7
Glacial Lakes & Prairies Region	12.4

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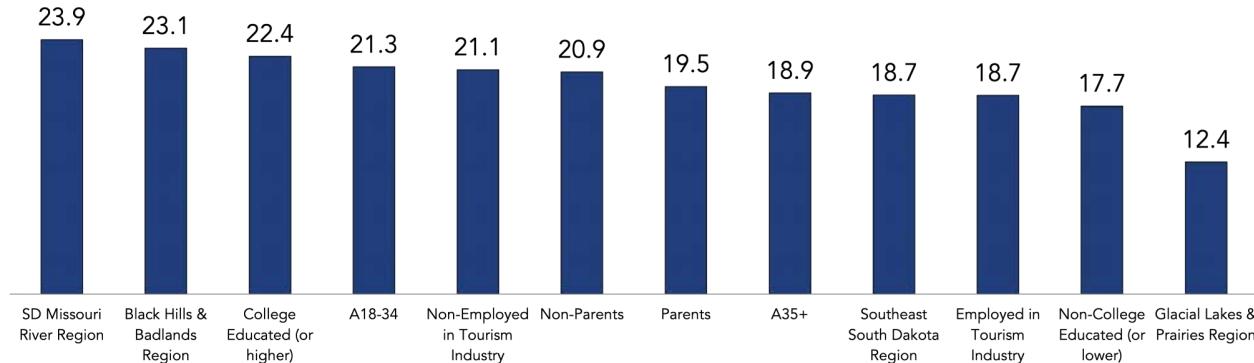
Experience Rating

When combining the "4" and "5" responses on the scale below, we can see that both South Dakota and the national sample are roughly equal in believing their state provides a positive experience for its visitors.

## Do you believe that your state provides a positive experience for its visitors?

■ South Dakota Sample ■ National Sample

|	1 - Strongly Disagree	2 - Disagree	3 - Undecided	4 - Agree	5 - Strongly Agree
South Dakota Sample	0.0%	3.1%	12.8%	60.8%	23.3%
National Sample	1.7%	2.2%	13.1%	47.7%	35.3%

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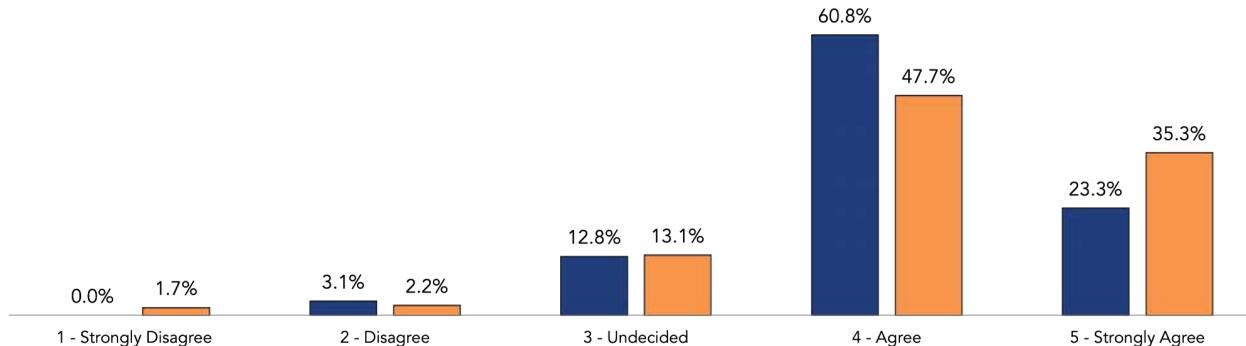
State Desirability Rating

South Dakota indexed higher as a desirable place to visit amongst its residents; however, the in-depth interviews fleshed this out more and noted that this was consistent with those who are aware of the state's offerings

Would you say that your state is viewed as a desirable place to visit by potential tourists?

■ South Dakota Sample   ■ National Sample

	1 - Strongly Disagree	2 - Disagree	3 - Undecided	4 - Agree	5 - Strongly Agree
South Dakota Sample	0.1%	4.9%	10.0%	53.8%	31.2%
National Sample	3.7%	9.8%	14.0%	40.1%	32.4%

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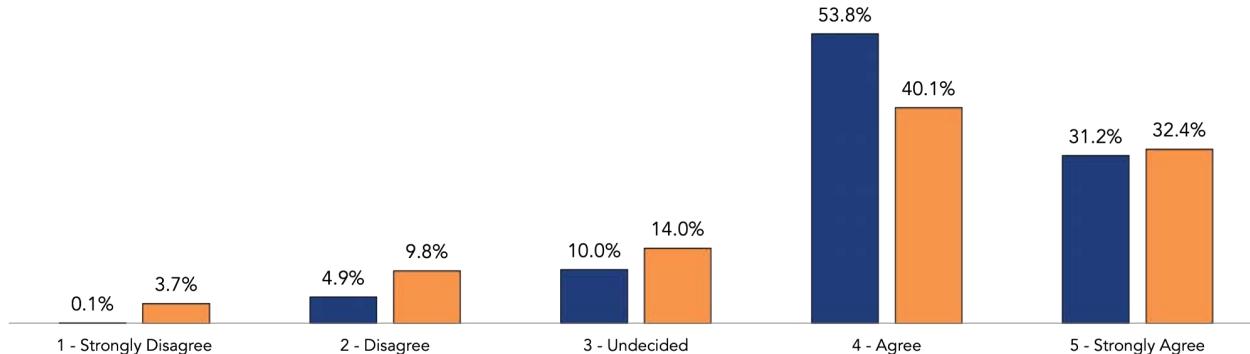
Visitor Behaviors

The one outlier in the below graph is that South Dakota residents believe is important to visit destinations when it's less busy as a best practice.

Thinking about potential visitors to your state, which of the following behaviors do you think are most important to follow?

■ South Dakota Sample ■ National Sample

Behavior	South Dakota Sample	National Sample
Respect the wildlife	71.8%	71.6%
Visit locally owned businesses	69.3%	71.6%
Exhibit leave no trace principles and treat the environment with care	67.6%	60.8%
Visit during times where there are less visitors in the destination to avoid overcrowding	66.5%	35.2%
Take care of the community they are visiting	65.6%	70.5%

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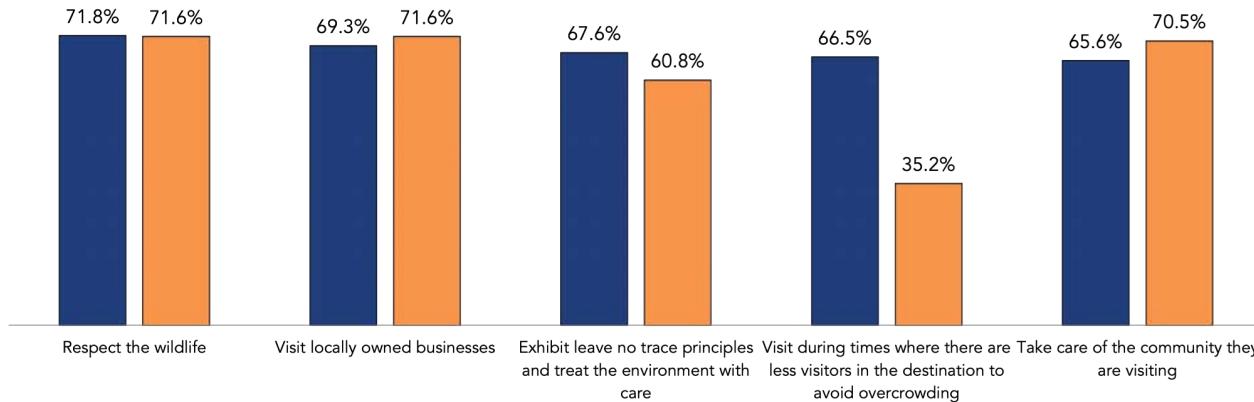
Forever 605 Awareness

As expected, national awareness for the Forever 605 initiative was quite low; however, amongst South Dakota residents it was a strong 55%. 2 of the 6 in-depth interview participants had heard of this initiative.

Have you ever heard of the "Forever 605" campaign initiative?

■ South Dakota Sample ■ National Sample

	Yes	No	Somewhat
South Dakota Sample	54.6%	36.0%	9.4%
National Sample	5.7%	92.3%	2.0%

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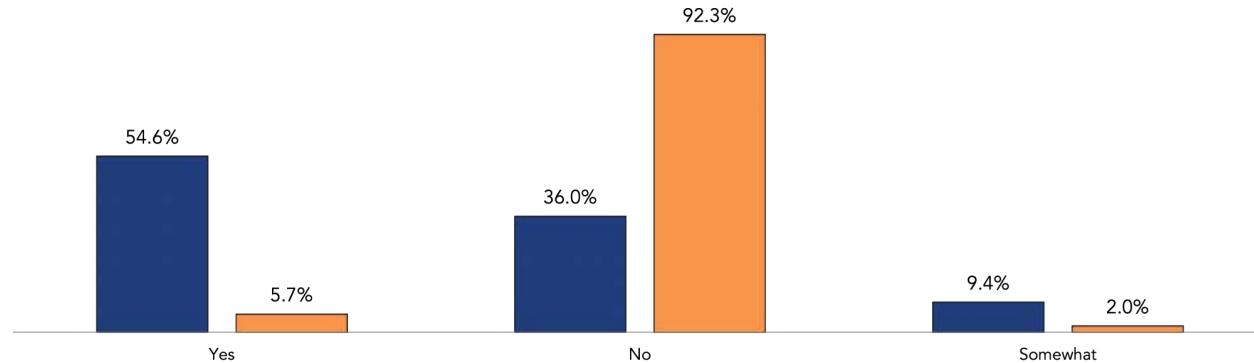
Takeaways & Recommendations

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Enthusiasm and awareness is high but knowledge of impacts might be low, other states have started far lower and more negative.

love.

Based on IDI's what the tourism office is doing is also a bit of an unknown, some of this is present in the data even if they do have recall for the Forever 605 brand.

love.

Message testing around this topic specifically could be a good idea through focus groups and/or quantitative methodologies.

- From what we have, economic messages resonate the best.
- Taxation continues to be the main thing people aren't noticing.

love.

This study likely has a two-year shelf life, recommend re-running the study at a minimum in 2027.

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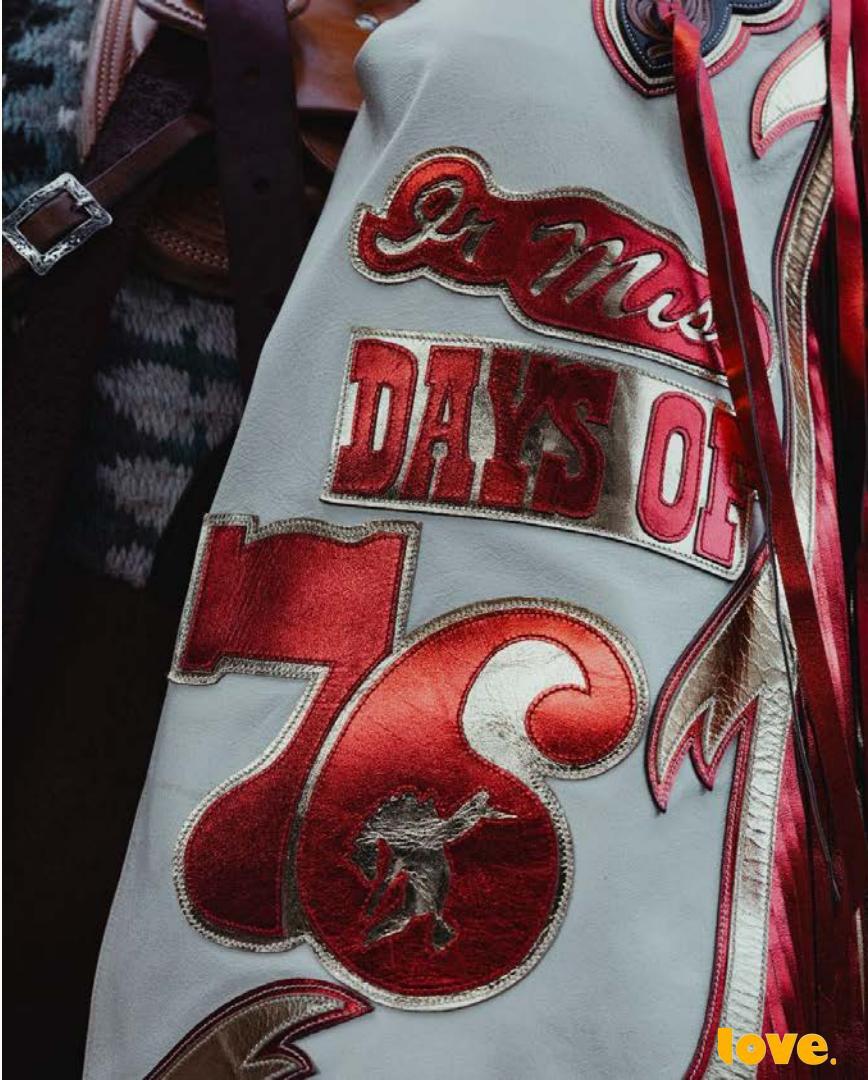
South Dakota residents have a high-level of enthusiasm, awareness, and knowledge of tourism and its impacts on the state and their communities (even if there are areas to grow, such as how it impacts taxes). Relative to other states that have conducted similar studies, the state is in a very good position with overall sentiment.

- That said, as expected, when segmenting to the "hot" spots of visitation around the state, that enthusiasm does wane.

love.

The tourism office as an entity, and what types of initiatives and efforts they are conducting on an ongoing basis, is largely unknown (this was mentioned in IDI's and to a degree in the quantitative data), even if Forever 605 brand awareness is high.

love.

For next steps, Love recommends incorporating some of the remaining questions (how do we get individuals to connect the dots between tourism and taxes? What messages that they rate highly actually impact behaviors? Et cetera) and incorporate them into the proposed message testing scope, looking at both residents and a national sample.

- This could include both actual creative testing but also general brand pillars and messaging frameworks for long-term use.

When it comes to conducting this study again in the future, we recommend tweaking any language in the statement rankings that alters with the times, and potentially expanding the survey given length of completion times.

love.

At a minimum, this study is recommended to be conducted every two years (i.e., next wave in Q1/Q2 of 2027).

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Regional Segmentations

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Regional segmentation of main questions pertaining to tourism health in addition to all statement responses can be found in Amplify, inclusive of statewide benchmarks and national average values.

https://amp.lovecomm.net/#/workbooks/639?:origin=card_share_link

Appendix

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Household Income

What was your total household income before taxes during the past 12 months?

■ South Dakota Sample ■ National Sample

Income Bracket	South Dakota Sample	National Sample
Less than $25,000	3.2%	9.9%
$25,000 to $34,999	9.4%	13.2%
$35,000 to $49,999	18.3%	14.7%
$50,000 to $74,999	33.4%	25.9%
$75,000 to $99,999	26.2%	12.3%
$100,000 to $149,999	7.7%	13.5%
$150,000 or more	1.8%	10.5%

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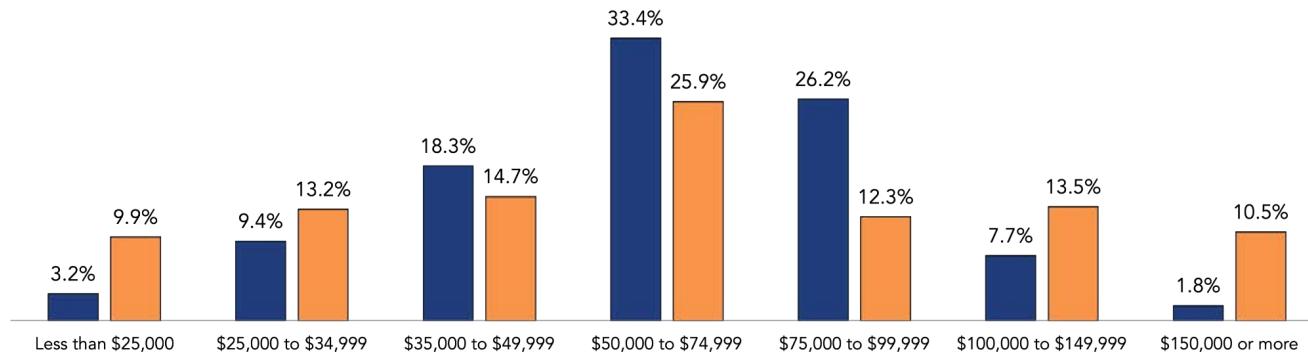
Education

## What is the highest level of education you have completed?

■ South Dakota Sample ■ National Sample

Education Level	South Dakota Sample	National Sample
Some high school	9.0%	5.7%
High school graduate / GED	13.4%	18.0%
Trade / technical / vocational training	6.3%	5.9%
Some college	19.4%	25.6%
College graduate	36.2%	31.0%
Some postgraduate work	3.0%	3.0%
Postgraduate degree	12.7%	10.8%

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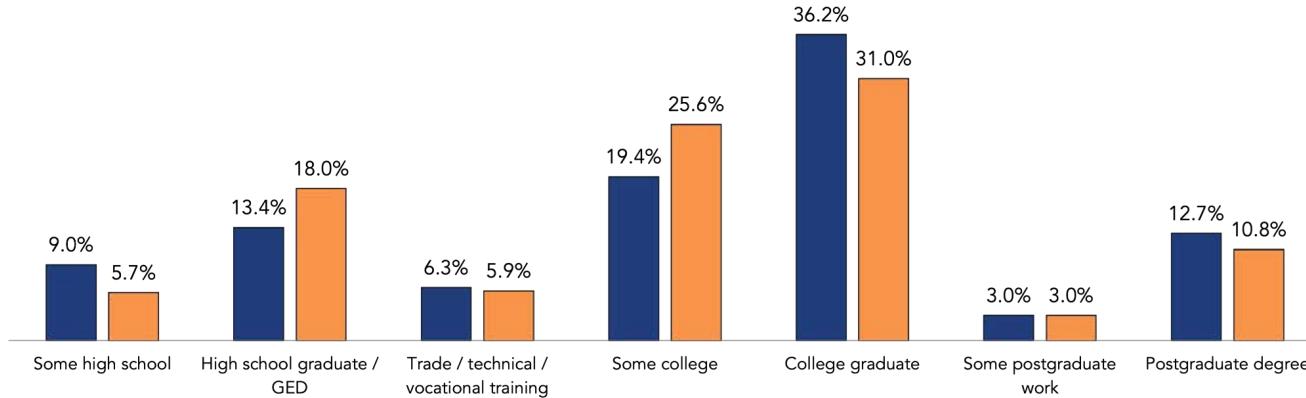
Parental Status

What is your parental status?

■ South Dakota Sample ■ National Sample

Parent
- South Dakota Sample: 56.4%
- National Sample: 61.5%

Not a parent
- South Dakota Sample: 43.6%
- National Sample: 38.5%

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Thank you!

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