

2019 STATE

of.

GREAT



**THE GOAL FOR TODAY
LOOKING AT TOURISM'S
EFFORTS, WHAT CAN WE
LEARN ABOUT CHANGING
AUDIENCES AND WHAT
THAT MEANS FOR THE SD
BUSINESS?**



A white silhouette of the state of South Dakota is centered on a background that is a gradient from teal on the left to green on the right. The text is centered within the white silhouette.

**VISITATION TO
SOUTH DAKOTA IN 2018
GREW 1.4%**

Source: Longwoods International South Dakota 2018 Advertising ROI Research



**DEPARTMENT OF TOURISM
MARKETING YIELDED 1.3M
TRIPS IN 2018.**

**TRIPS THAT WOULDN'T
HAVE HAPPENED WITHOUT
ADVERTISING.**



**THESE ADDITIONAL
TRIPS CONTRIBUTED
ANOTHER \$176M
MORE IN SPENDING.**

Source: Longwoods International South Dakota 2018 Advertising ROI Research



Traveler Journeys

OBSTACLES & OPPORTUNITIES



What fun would this be if it was easy.

**UNFORTUNATELY, WITH A
NEW CAMPAIGN COMES A
DROP IN AD AWARENESS.**

Source: Longwoods International South Dakota 2018 Advertising ROI Research





ADVERTISING IMPACTS

LONGWOODS STUDY OF 2018 CAMPAIGN ON SOUTH DAKOTA'S PERCEPTION

People exposed to the 2018 campaign gave South Dakota substantially higher rating scores than those unfamiliar with the campaign.



Source: Longwoods International South Dakota 2018 Advertising ROI Research



2018/2019 Forecast

Intent to Travel in 2018/2019 Down 3%

Source: MMGY Global Portrait of American Travelers 2018-2019





Despite Less Overall Trips

ROADTRIPS EXPECTED TO GROW 17%

It's about convenience, cost and discovery. Travelers want to make stops along the way, want the ability to pack everything they need, maybe save a few bucks and lastly, to discover someplace exciting and new.

Source: MMGY Global Portrait of American Travelers 2018-2019



“

No two journeys are exactly alike, and in fact, most journeys don't resemble a funnel at all.

ALLAN THYGESEN

President of the Americas at Google

“Customer intent in the nonlinear modern marketing funnel” Clickz, 12/18/2018

”



**TRAVELERS ARE
CONSTANTLY
MOVING FROM
PHASE TO PHASE
AND BACK AGAIN.**

*MORE THE DANCE
OF A BEE THAN A
LINEAR PATH.*

Discover Research Evaluate
Commit Experience



Destination Indecision

THERE'S STILL TIME

2/3rds

**OF TRAVELERS ARE
UNDECIDED**

Picking the destination is one of the first steps for 32%. For the rest, it's research and consideration.

7 of 10

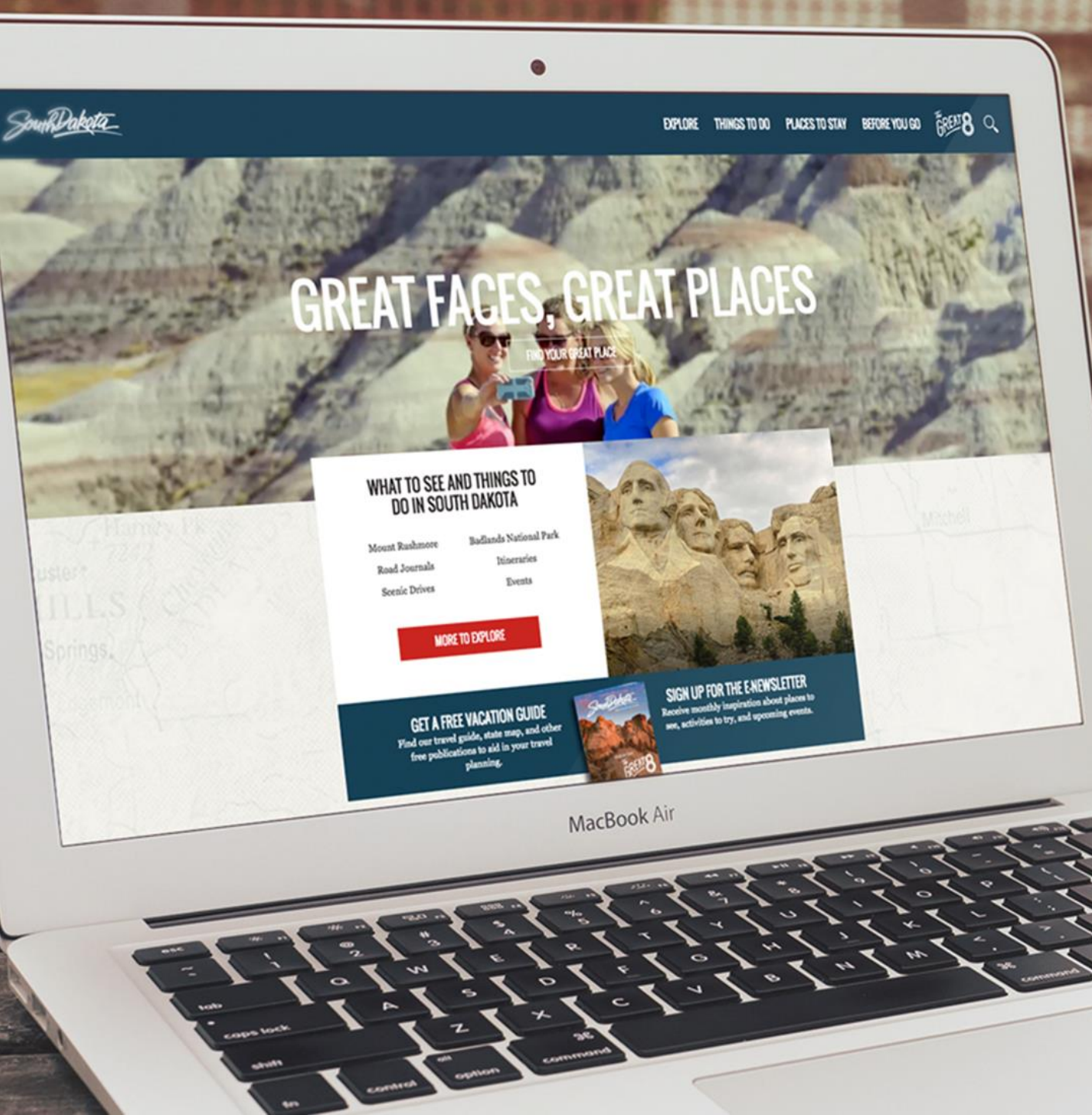
**ARE OPEN TO
INFLUENCE**

According to Expedia, most are open to influence throughout the planning process.

Over 90%

**AD RECALL RIGHT
BEFORE BOOKING**

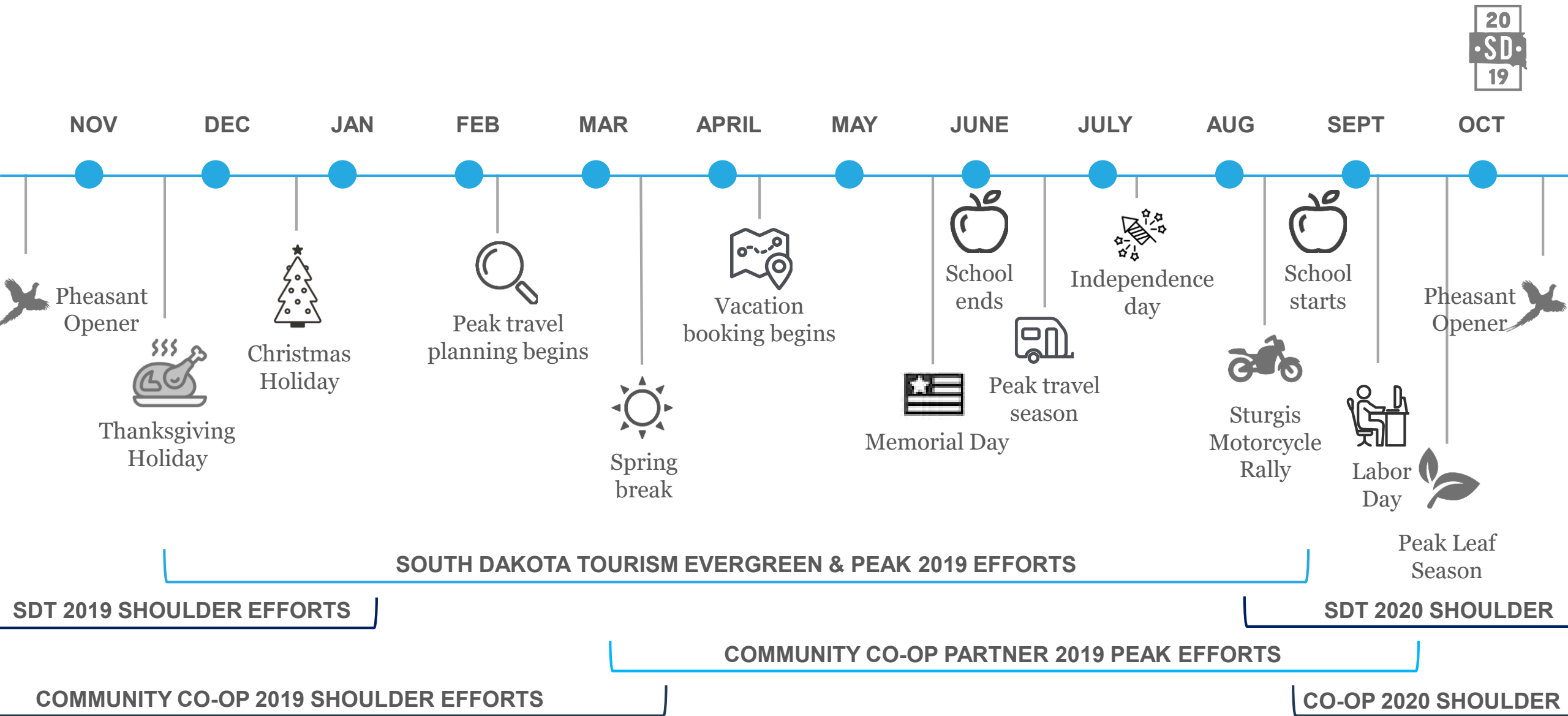
As travelers near the moment of no return, ad impressions drop while ad recall skyrockets.



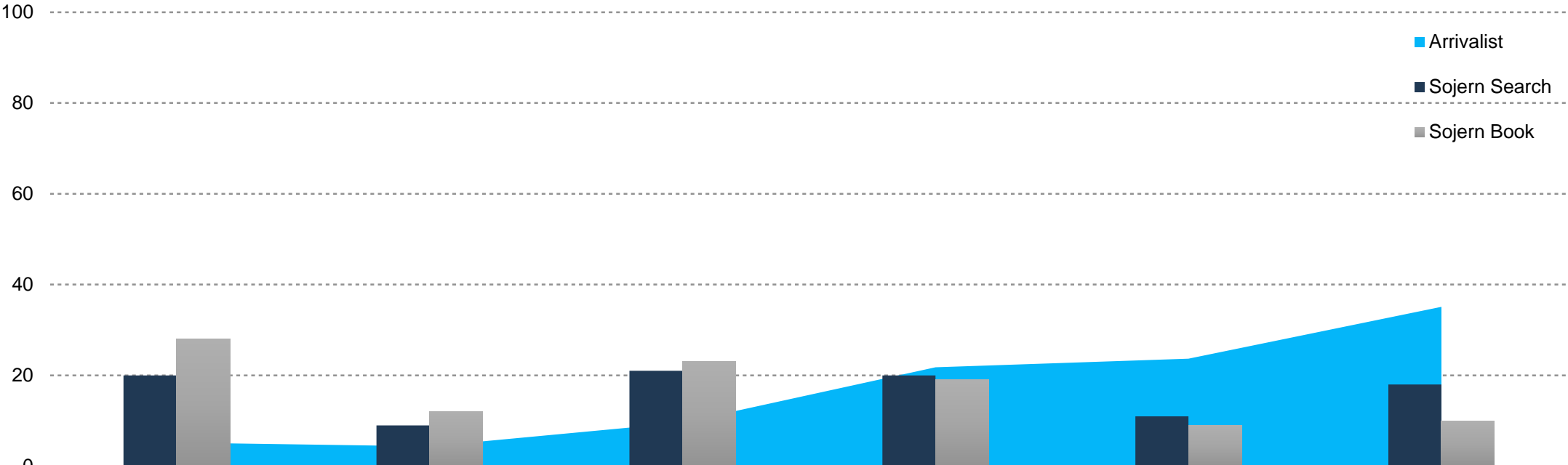
Americans View an Average of 140 Travel Sites While Planning

45 days prior to booking, Americans are doing their research. Canadians view 161 travel sites researching potential travel sites (it's cold and dark there I'd be checking out more tropical beach locales too).

Source: Expedia Travel Group *Travelers Path to Purchase*



SD TRAVELER JOURNEY TIMELINES



- Arrivalist
- Sojern Search
- Sojern Book

| | 1-7 Days | 8-14 Days | 15-30 Days | 31-60 Days | 61-90 Days | Over 90 Days |
|---------------|----------|-----------|------------|------------|------------|--------------|
| Arrivalist | 5.2 | 4.4 | 9.6 | 21.8 | 23.7 | 35.1 |
| Sojern Search | 20 | 9 | 21 | 20 | 11 | 18 |
| Sojern Book | 28 | 12 | 23 | 19 | 9 | 10 |

Industry Opportunity

CLAIM AND MAKE THE MOST OF YOUR ONLINE PRESENCE

It may be basic but is often forgotten. Make sure not only that you've claimed or set up your business on Google, Bing, Facebook Local, TripAdvisor, or other sites relevant to you, but update on an annual basis. Invest in great photos.

Encourage positive reviews from your customers with signage.



Industry Opportunity

TRAVELSOUTHDAKOTA.COM, REGION, AND YOUR CHAMBER/CVB WEBSITES

These sites are meant to be found by visitors and often will be over private businesses for more general searches. Make sure your online profiles are strong here too. Get them event info as soon as you can for possible inclusion in email or other efforts.



Additional Slide

Industry Opportunity

SDT WEBINAR SERIES

Be on the lookout for upcoming webinars from the department this spring, starting with a three-part marketing series from Lawrence & Shiller. More info to come, posted on SDVisit.com and included in our Mile Marker Industry Newsletter.



2019 Strategy

YEAR-ROUND, MULTI-CHANNEL APPROACH DRIVEN BY DATA

Stacked tactics support each other across platforms, encouraging greater frequency and touch points throughout Travelers' journey. Great ecosystem of tools and talent consistently monitoring traveler insights and making that data actionable.



2019 Campaign

AUDIENCES OF FOCUS



FAMILIES

- » Age: 25–44
- » Income: \$60K–\$150K
- » Children: Yes



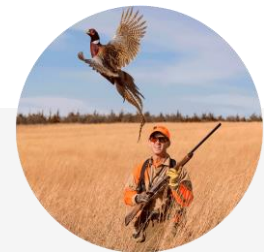
WANDERERS

- » Age: 50+
- » Income: \$100K+
- Some on fixed income/tied to investments*
- » Children: None in household



SEARCHERS

- » Age: 25-44
- » Income: \$50k-\$100K
- » Children: Not in party



OUTDOORS

- » Age: 35-60
- » Gender: Male
- » Income: \$80K+
- » Married: Yes

Industry Opportunity

LEARN SDT AUDIENCES AND ALIGN EFFORTS TO TARGET

Keep South Dakota Tourism audiences in mind when creating web content, buying and placing ads, or any other traveler efforts if you don't already have a specific audience profile you're targeting.

Check out the Department's Brand Standards Guide at <https://sdvisit.com/brand-standards> for complete audience detail.



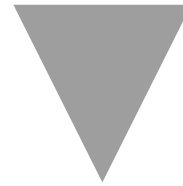
SDT 2019 MARKETS



Website
Data



VEP
Data



MMGY Global
Terminal



Historical
Presence



Arrivalist
Data



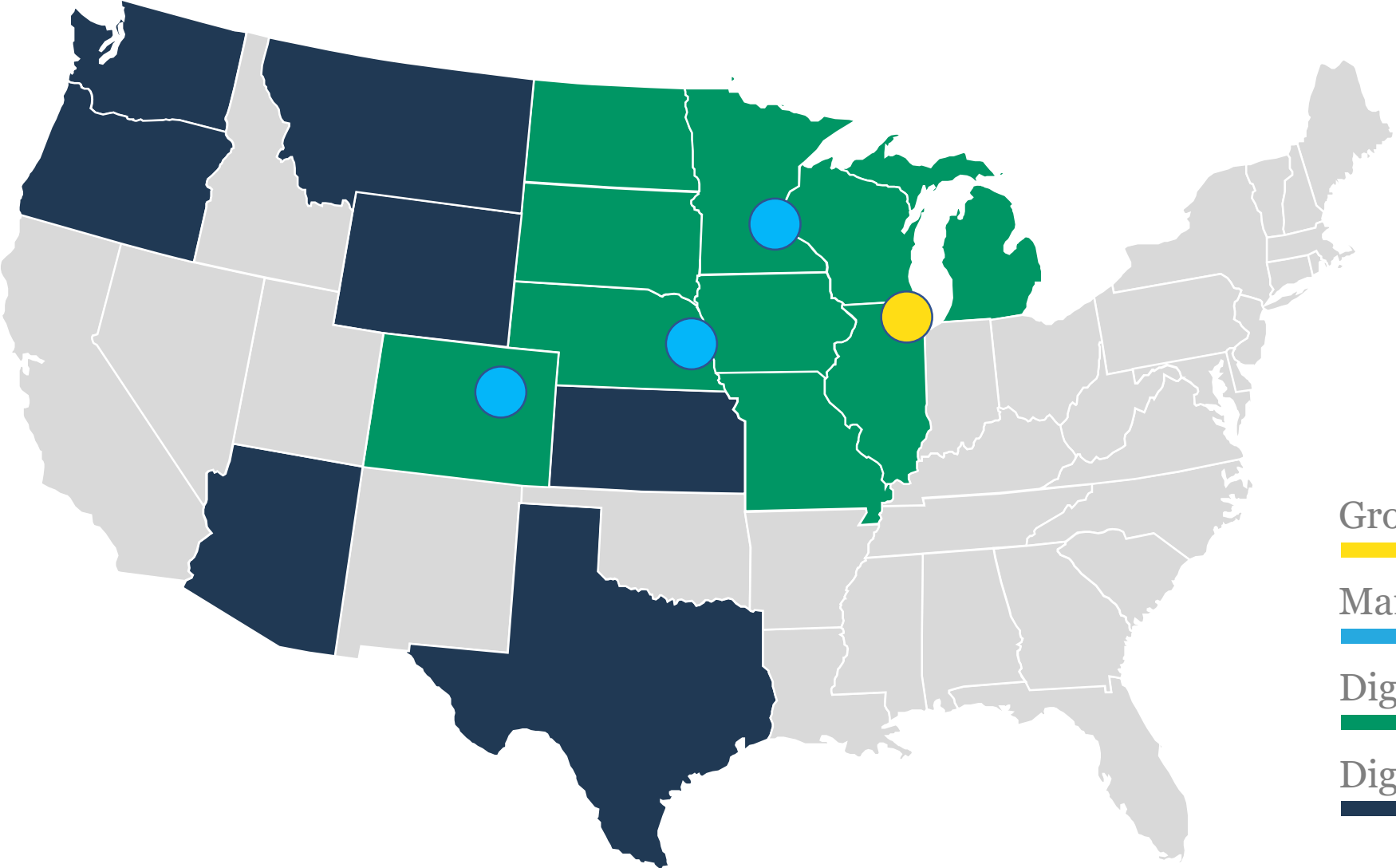
Black Hills
Intercepts



Co-op
Efforts



SDT 2019 MARKETS



- Growth
- Maintenance
- Digital - Primary
- Digital - Secondary



2019 Messaging



Great Faces, Great Places

We are a state that is home to world-renowned monuments, breathtaking landscapes, rich Native American culture and Western heritage, and warm hospitality.

Great Faces, Great Places shows the unexpected side of our state. Showing the known SD faces or the spirit one will find here, along with iconic or unexpected destinations, serves as a catalyst for changing visitor perceptions.

2019 Campaign

TELEVISION



Digital may be the largest piece of the pie but digital and video's growth is tied to TV just going online. TV – in all its modern forms - still remains the dominant inspiration medium.



SOUTH DAKOTA GOVERNOR'S
CONFERENCE ON TOURISM
2019

2019 Campaign

TELEVISION



FAMILIES



Index: 96
Vertical: 75%



WANDERERS



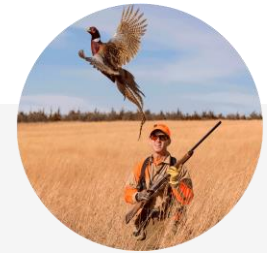
Index: 111
Vertical: 86%



SEARCHERS



Index: 91
Vertical: 71%



OUTDOORS



Index: 107
Vertical: 83%

2019 Campaign

PRINT

In a Digital world, print's not dead. It's just a little more niche, has become a higher-end luxury. It's something tangible you can hold and feel that's highly inspirational and memorable.

2019 Campaign

MAGAZINES



FAMILIES



Index: 101
Vertical: 73%



WANDERERS



Index: 116
Vertical: 83%



SEARCHERS



Index: 99
Vertical: 72%



OUTDOORS



Index: 106
Vertical: 76%

As the global environment continues to become more erratic and governments exist in a state of perpetual denial, there will be more economic and actual resources devoted to fighting the fires that will develop as a result. Populations in the U.S. will continue to age - under saved workers will be increasingly forced to delay retirement. Some researchers predict that almost 17% of the workforce will be composed of older adults, up from 13% in 2000 (Fullerton & Toossi, 2001); painting an even more graphic picture, noting that the older labor force is expected to increase at a rate more than five times faster than the overall labor population. As times noted more seniors will be putting off retirement; with almost 70% of 50 to 70 year olds expecting to work past traditional retirement age or never retire at all, employment is becoming a necessity rather than an option for the seasoned worker (Gill, 2008; Memmin, Johnson, & Murphy, 2007; Pounds, 2011).

The debt crisis is a worldwide phenomenon, with developing nations leading the charge; according to the Economist World Debt Clock (www.economist.com/content/global_debt_clock) global public debt has doubled in the past 10 years to over \$52 trillion. There is seemingly no end in sight to the world's outsized appetite for arguably unsustainable living standards; developing nations now clamoring for goods and lifestyles unimaginable only a decade ago.

We predict that the results of this untenable economic course as well as the continued growth of populations throughout the world; the current population of 7.2 billion is expected to grow to 9.6 billion by 2050 and over 10 billion by 2100 (UN population projections, Population Institute). These economic and population trends could lead to U.S. and global challenges bordering on the catastrophic.

ABOUT THE RESEARCH

The goal of our research was to identify frameworks, practices and strategies that helped individuals survive and even prosper since the 2008 U.S. and Global economic collapse. We did both qualitative and quantitative research studies to gain a rich 3 dimensional view of the phenomenon, one of the first research studies completed with 5 years of data.

In the qualitative study we interviewed 42 participants, most of who had lost employment and had to go through the process of regaining work as a result, we also interviewed a select number of employers and placement professionals to look at similar issues from their perspective. The quantitative study surveyed 490 participants with a specially designed research instrument to isolate what factors and practices made the most difference in outcomes (success or failure) in the job searching process.

Our 3 year study yielded a significant catalogue of helpful knowledge pointing to the importance of relational networks, adaptability, physical vibrancy and the importance of managing one's career and risk profile. We further isolated a measurement tool that should prove helpful in determining how well people are situated to ride out future convulsive economic cycles.

as a result of convulsions that will become more pronounced - exhibiting ever shorter cycles.

A New Framework for a New Reality

We now propose a new paradigm, the Promethean Framework; in which we now captain a larger and stronger vessel, with sophisticated scanning and environmental monitoring equipment - also comprised of leading edge composites to survive the biggest storms imaginable. A new type of vessel, allowing you to stay upright and above water in the worst conditions; allowing you to use the energy and force of the tumultuous environment around you to actually propel you forward, flourishing and growing both personally and professionally. In short, building and navigating a new type of boat - one specially designed and built to (almost) routinely navigate such dramatic and convulsive environments.

Building Your New Boat

So how do we as parts of this dysfunctional whole position ourselves in the decades to come? This article will help you learn and adopt a fresh set of strategies and practices to better allow you to design and construct your new vessel to navigate these potentially treacherous waters.

Defining and learning these skills are within reach for each of us if we can first come to terms with and acknowledge the issues and realities at hand. Understanding first and foremost, that it is necessary even crucial to our long-term economic and personal well-being. Note the phrase "long-term", in such a turbulent and challenging environment; there will likely be times that the best possible result will be survival - or if you will "live to fight another day". However, establishing a foundational platform that keeps you upright and stable could count for victory depending on the economic and social realities.

Showing the techniques to build this stronger, more solid boat and outfitting it with anchors that will allow it to remain upright no matter the conditions; this set of learned skills we will refer to as the Promethean Framework.

The Promethean Framework

The name of our study and resultant framework is inspired by the Greek God Prometheus. Prometheus was chained to a rock in a remote location as punishment for his bad and rebellious choices (Al-Hasan & Neimeh, 2012). Ironically, Prometheus has become a mythical figure who represents (current and relevant) traits such as human striving as well as the risk of overreaching and unintended consequences. Much like Prometheus, present day society is chained to a rock of our own making, evidenced by debt-laden economies, governmental system breakdowns and historically high unemployment levels. These current issues have many stuck between this metaphorical rock and a hard place.



EVEN GREATER THAN YOU'VE HEARD.

The rustle of the grass. The cackle of a rooster. The thunder of a flush. The field has its own language - one you and your dog speak fluently. Hear it for yourself in South Dakota.

South Dakota

#HuntInSD // 800.732.5682 // HuntInSD.com

SOUTH DAKOTA GOVERNOR'S
2019
CONFERENCE ON TOURISM

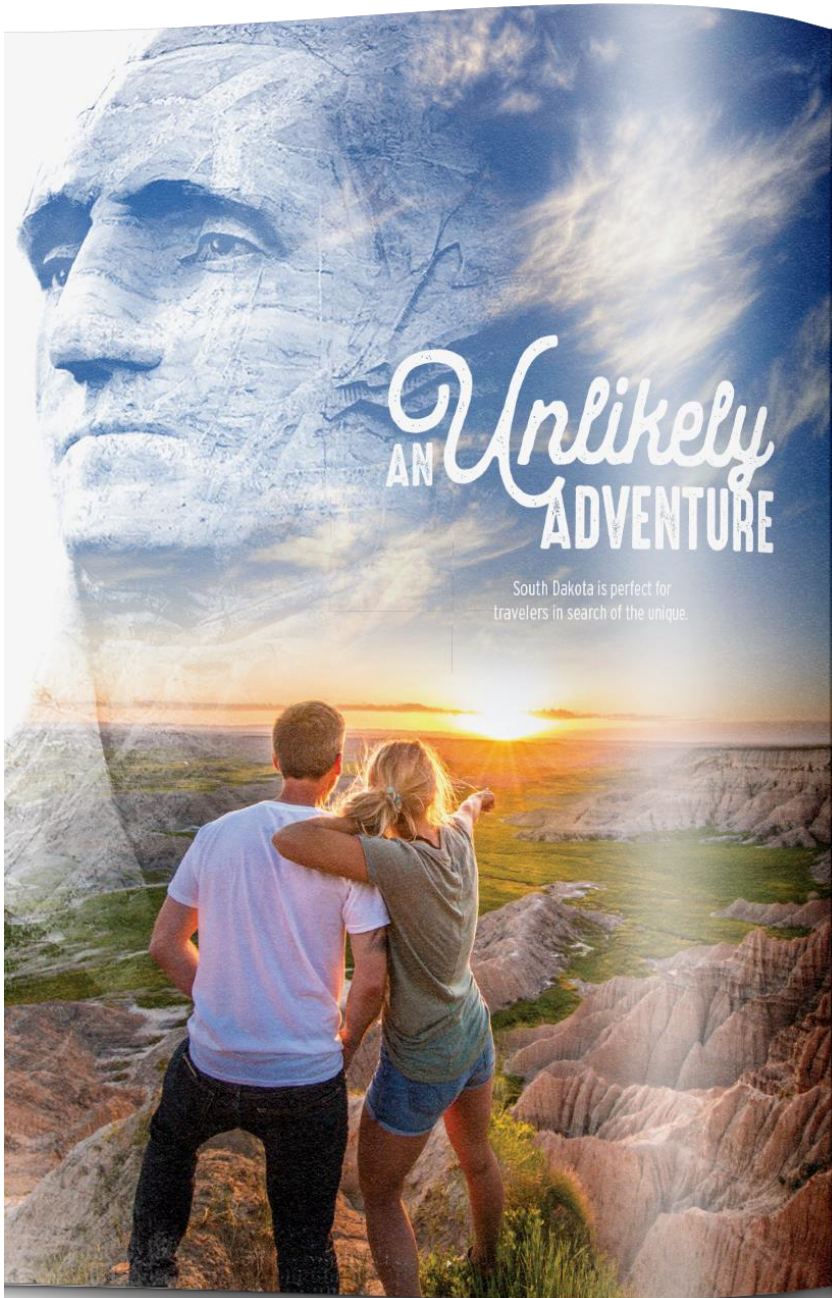
BLACK HILLS NATIONAL FOREST

WELCOME TO A WINTER
Wander-land

Sometimes the greatest gift is getting outside
and getting in touch with the miracle of nature.

South Dakota

TravelSouthDakota.com // 1-800-732-5682



AN Unlikely ADVENTURE

South Dakota is perfect for travelers in search of the unique.

Of all the possible vacation options, one state—often overlooked but consistently surprising roadtrippers and explorers—stands apart. With its magnificent scenery, beautiful national and state parks, and one-of-a-kind attractions, the land of “Great Face, Great Places” may seem like an unlikely destination—but it should absolutely be at the top of your travel to-do list.

Breathtaking scenery awaits travelers in Badlands National Park. Here you’ll encounter striking rock formations stretching into the prairie sky, creating a landscape like something out of a science-fiction film. The park covers 244,000 acres and features hiking trails of varying difficulty and wildlife including bison, bighorn sheep, and prairie dogs. Camp under the stars on a clear night and you’ll be treated to a celestial spectacle unlike anything you’ve seen before.

Anyone looking to get out into the wild is in for a treat, as nearly all of South Dakota serves as a playground for outdoor enthusiasts. The Missouri River meanders throughout the state, providing the perfect setting for everything from waterskiing to fishing.

The city of Spearfish, a quaint community near the state’s western border, is rife with opportunities for hiking, mountain biking, and rock climbing. The area also features gorgeous waterfalls, each of which is suitable for even the most rigorously curated Instagram feed.

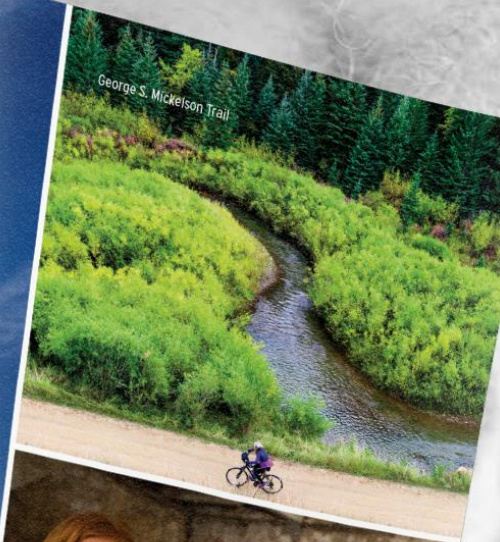
Those in search of locally inspired food and culture will find it in the surrounding Black Hills: an area as rich in history as it is in restaurants and breweries. Fans of craft beer should make a point to visit Custer, where you’ll find Sloger Kitchen, Black Hills Burger and Bun, and Mount Rushmore Brewing Co., the perfect places to sample delicious local fare and libations infused with South Dakota flavor.

Once you’ve had your fill, head to Custer State Park to experience the state’s true grandeur. Highlights include Wildlife Loop Road—famous for its bison and burro encounters—and Sylvan Lake, a beautiful waterbody surrounded by towers of granite rock. While the park features fine prairie hikes, Sylvan might just be the ideal spot to kayak across its serene surface for the day.

Whether you’re in search of adventure or relaxation, there’s a great night ahead of you in South Dakota. Expect to experience—and enjoy every moment. Start finding inspiration for your trip with the state’s free Vacation Guide. Download today at TravelSouthDakota.com.

South Dakota

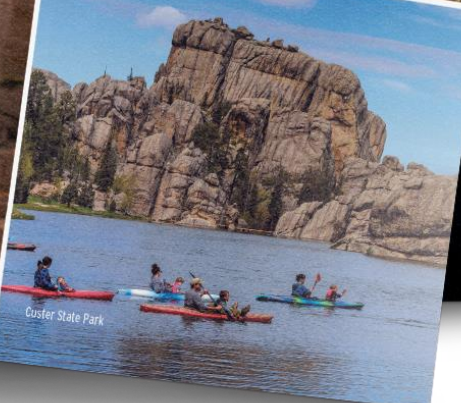
TravelSouthDakota.com // 1-800-732-5682



George S. Mickelson Trail



Firehouse Brewing Company // Rapid City



Custer State Park

FROM OUT OF Nowhere

Make your next family vacation unforgettable by journeying to someplace unexpected—like the wide-open state of South Dakota.

With its gorgeous landscapes, untamed wilderness, and evocative icons, the land of "Great Faces, Great Places" may seem like an unlikely destination—but it should absolutely be at the top of your travel to-do list. If you're driving across the state headed west, your first moment of surprise comes from seeing the otherworldly formations of Badlands National Park. Nowhere, and immediately command your attention. You'll have a blast exploring the wind-carved peaks, hunting for fossils, spotting wildlife like buffalo, many hiking trails.

Continue heading west and you'll hit a gold mine of family fun: the beautiful Black Hills. With so much to offer on any occasion, either by one of the hundreds of family-friendly attractions or by the mystery and wonder of the Black Hills themselves. You can hop aboard the 1880 train—an authentic steam engine that travels between the mountain towns of Hill City and Keystone—or zipline over a forest of ponderosa pines at Rushmore Tramway Adventures, located just two miles from Mount Rushmore National Memorial.

Two more unexpected fun awaits travelers who choose to explore the eastern half of South Dakota. Sioux Falls, the state's largest city, is filled with family-friendly activities. One example: The Butterfly House & Aquarium, which features 800 free-flying butterflies and 10,000 gallons of aquariums.

In a state as vast and stunning as South Dakota, there's no end to the amount of surprise your family vacation. Expect the unexpected—and enjoy every minute. Start finding inspiration for your trip with our new Vacation Guide. Download today at visitSouthDakota.com.

South Dakota

visitSouthDakota.com // 1-800-732-5682



Custer State Park



Rushmore Tramway Adventures // Keystone



Butterfly House & Aquarium // Sioux Falls

South Dakota

2019 VACATION GUIDE

20
SD
19



The Great 8
Eight spots you'll rush
to put on your itinerary

Scenic Byways
Eight ready-to-hit-the-road trips

Outdoor Adventure
Endless combinations of
scenery & exhilaration

TravelSouthDakota.com

Industry Opportunity

WE'RE STRONGER TOGETHER

People want a worry-free vacation and knowing that they can easily find unique attractions, entertainment, lodging, dining, and transportation is instrumental in committing to one destination over another.

Partner-up, be it with local businesses, your chamber/CVB, region and SDT.





Industry Opportunity

**SDVISIT.COM/COOPERATIVE-
MARKETING-OVERVIEW**



2019 Campaign

DIRECT-MAIL



FAMILIES



Index: 104
Vertical: 43%



WANDERERS



Index: 112
Vertical: 59%



SEARCHERS



Index: 121
Vertical: 64%



2019 Campaign

OUT-OF-HOME (OOH)



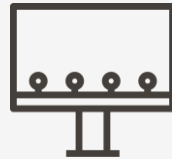
FAMILIES



Index: 112
Vertical: 55%



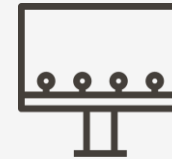
WANDERERS



Index: 110
Vertical: 78%



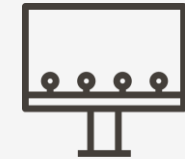
SEARCHERS



Index: 116
Vertical: 81%



OUTDOORS



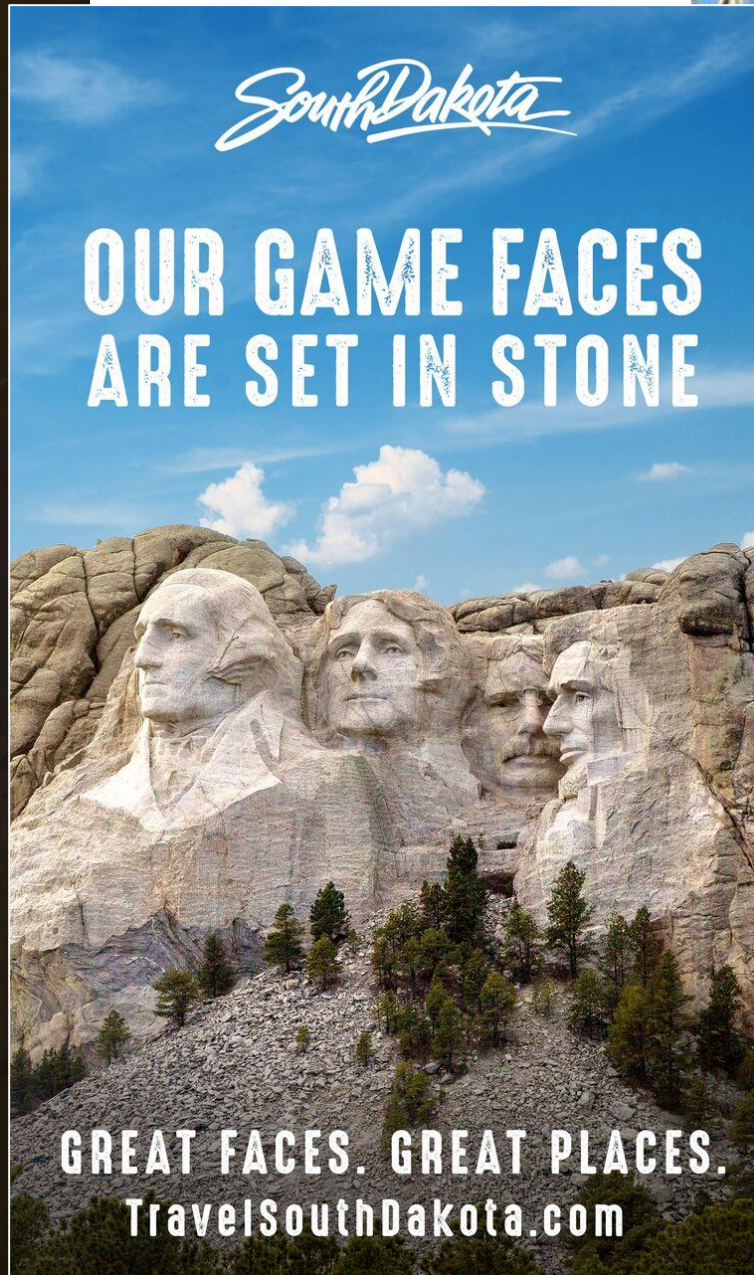
Index: 119
Vertical: 84%

Macy's
**THANKSGIVING
DAY
PARADE**



CONFERENCE ON TOURISM SOUTH DAKOTA GOVERNOR'S
2019





South Dakota

WE'VE GOT
GAME.

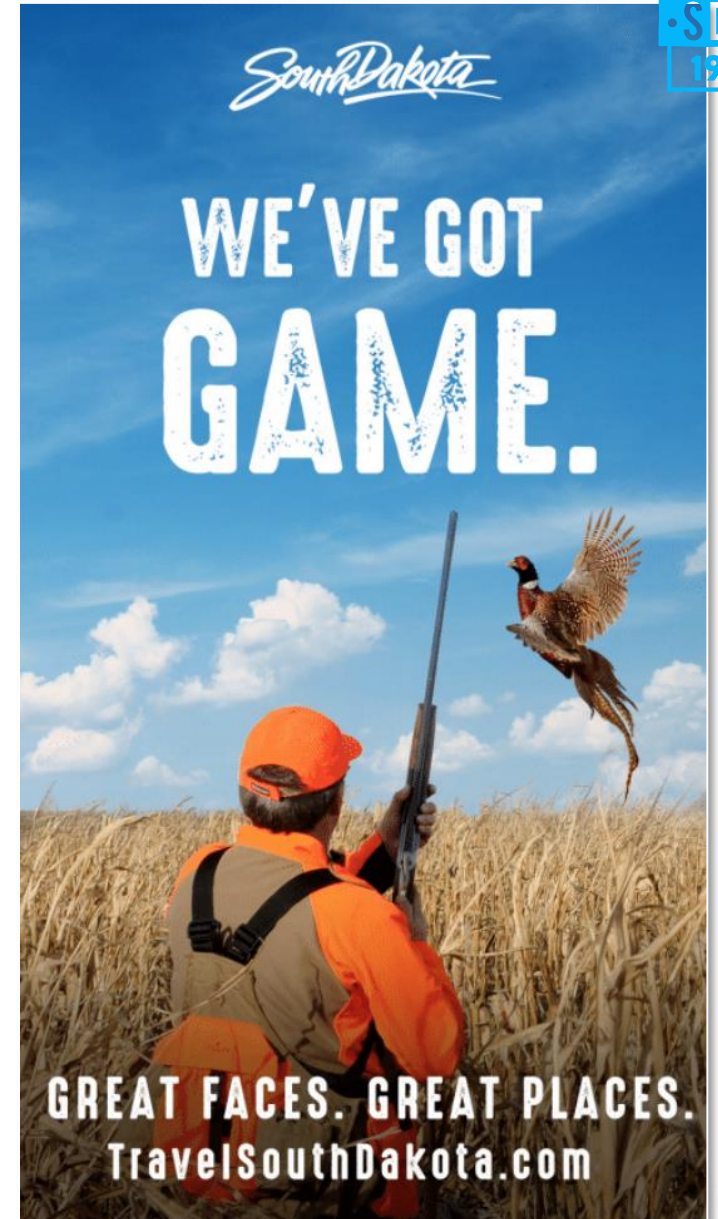


TravelSouthDakota.com

SCORE

South Dakota

WE'VE GOT
GAME.



GREAT FACES. GREAT PLACES.
TravelSouthDakota.com



HEAD LIGHTS ON.

South Dakota





SHIFT TO PARK.

South Dakota



OUT-OF-HOME (OOH)

46%

Percentage of Consumers who report searching for a brand after seeing an OOH placement.

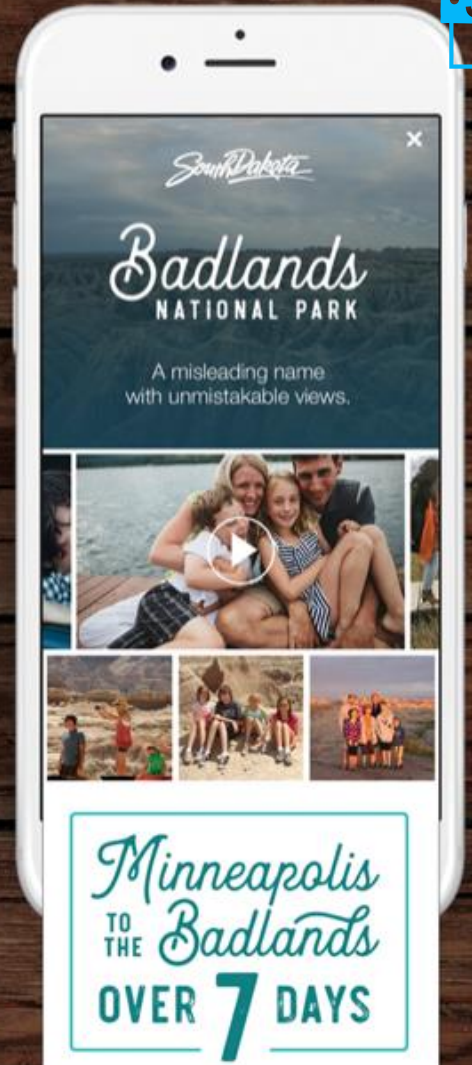
48%

Consumers more likely to engage with a brand after seeing an OOH placement + mobile ad together.

9.8%

Foot traffic conversion rate for 2018 SDT Mobile Compass Unit geo-fenced to 2018 OOH efforts.





A ROAD TRIP WORTH TAKING

This seven-day, fun-filled adventure will allow you to see and learn all about the Badlands and see why so many people call it home!

Start out by traveling on **I-90**, and head towards **exit 131** for the Badlands Loop State Scenic Byway (SD 240). The Badlands Na-

2019 Campaign

DIGITAL & SOCIAL



FAMILIES



Index: 118 / 123
Vertical: 97 / 93



WANDERERS



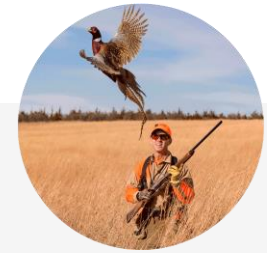
Index: 110 / 100
Vert: 90 / 74%



SEARCHERS



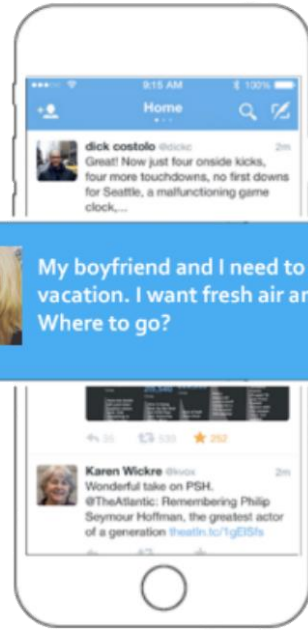
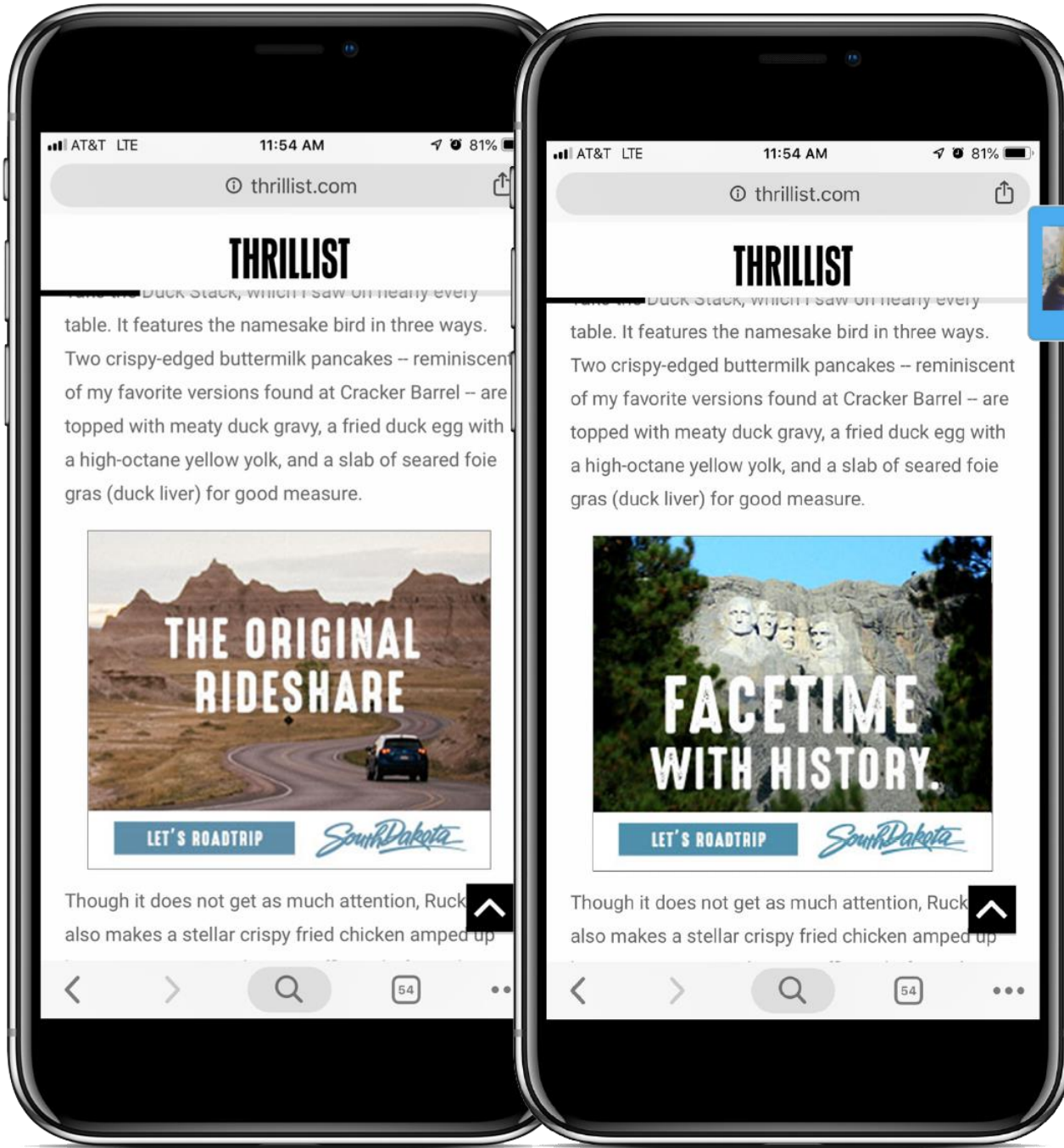
Index: 118 / 126
Vertical: 97 / 93%



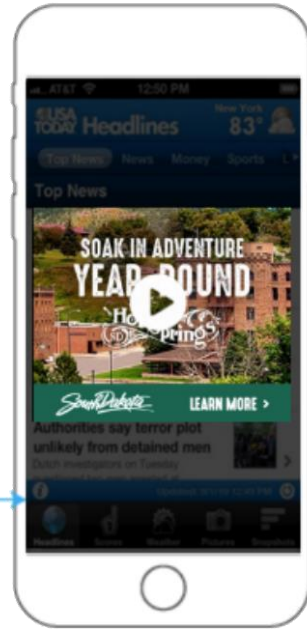
OUTDOORS



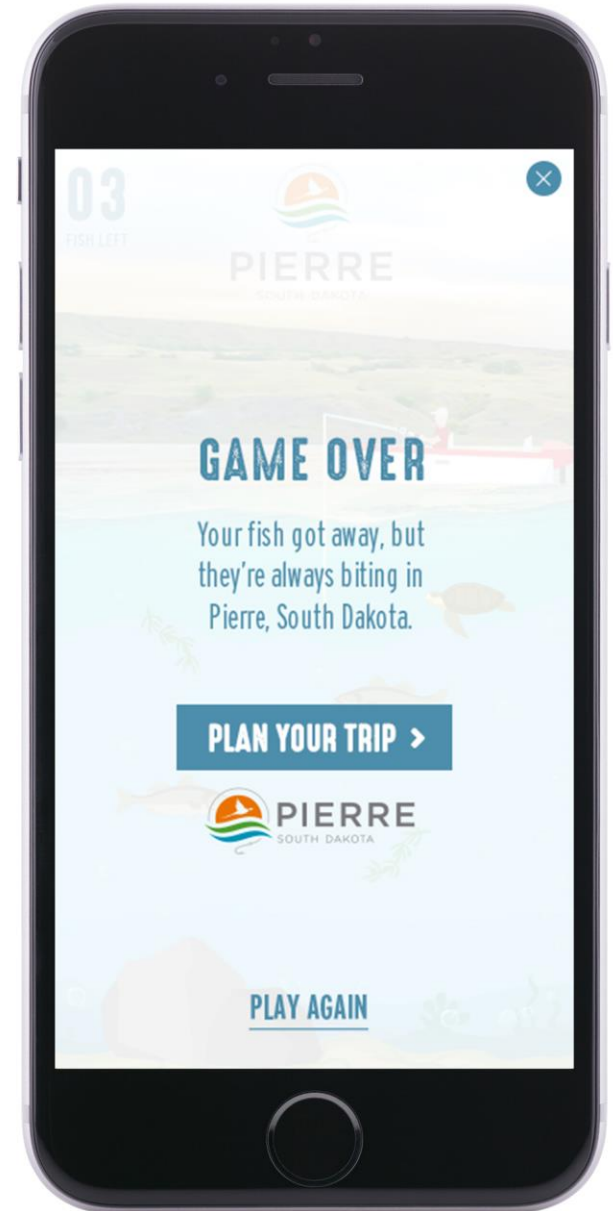
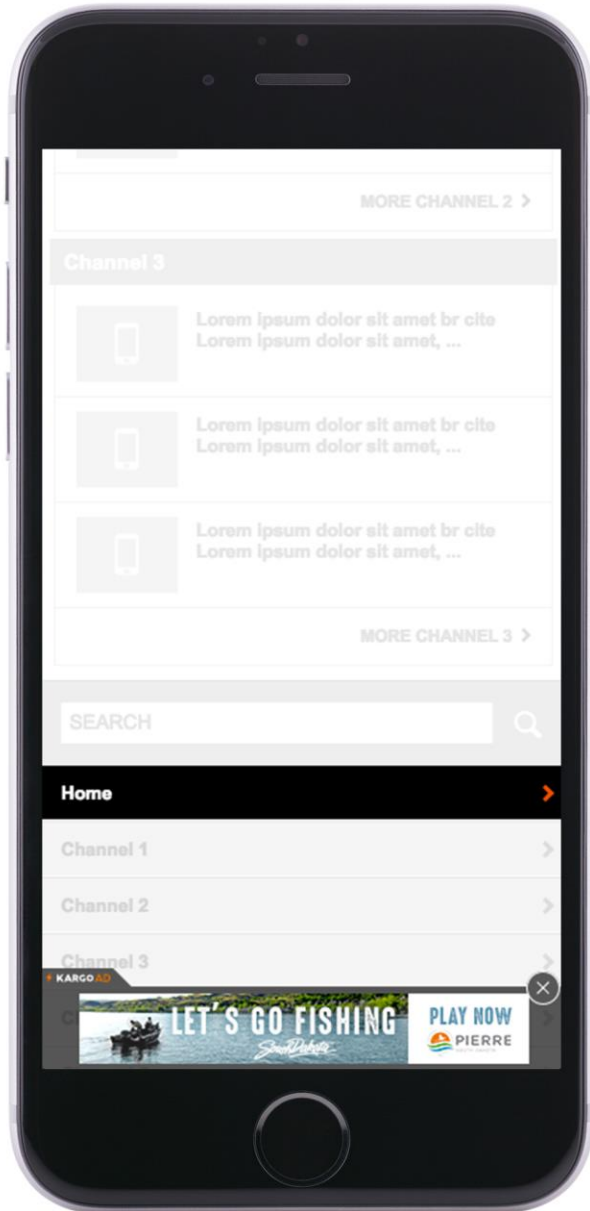
Index: 112 / 106
Vert: 92 / 78%



My boyfriend and I need to plan a vacation. I want fresh air and nature! Where to go?







2019 Campaign **DIGITAL & SOCIAL**

SOCIAL

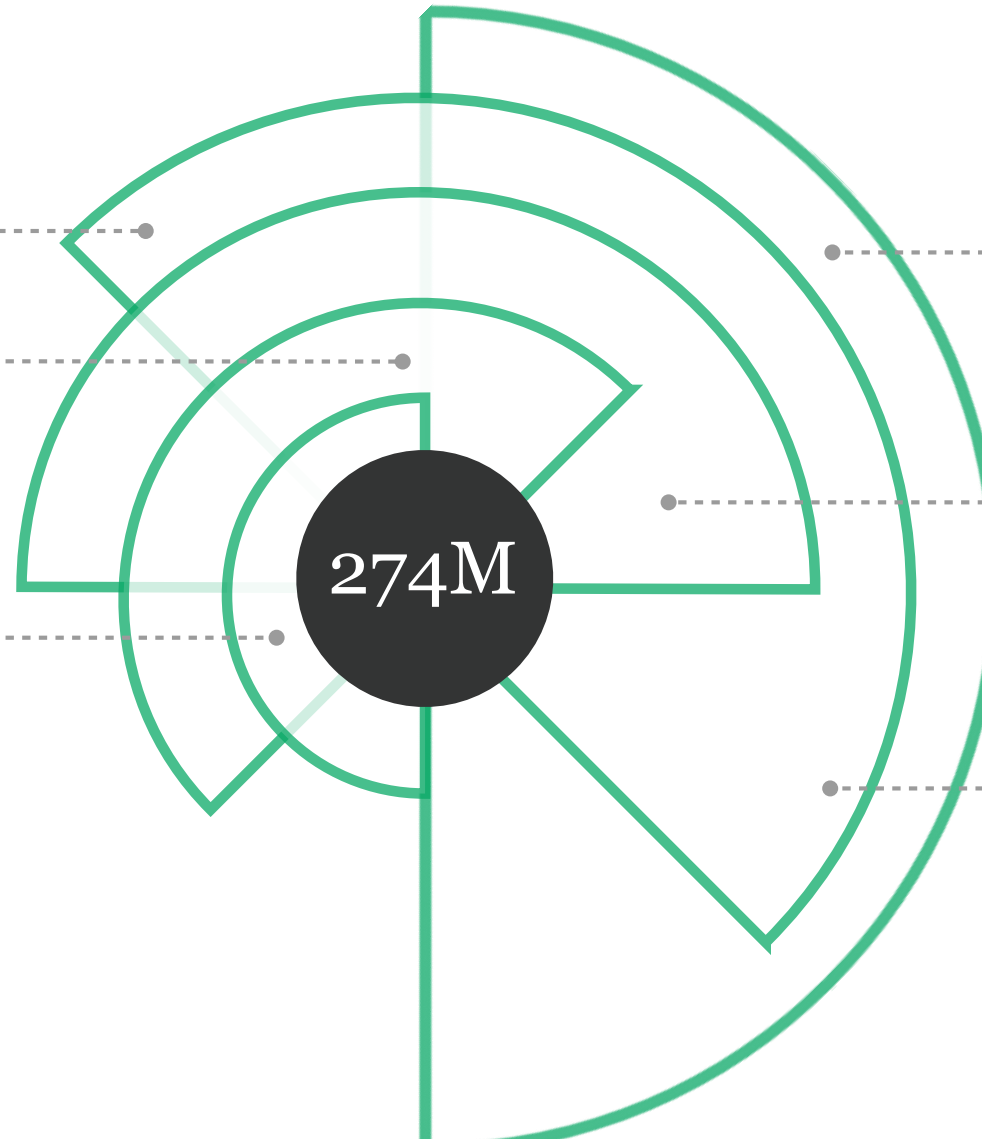
Highly targeted ads placed in social channels to generate engagement and activity outside of owned social channels

VIDEO – DIGITAL BROADCAST EXTENSION

Video deployed across devices to data-based audiences to prospect users and drive action

CONTENT/NATIVE PLATFORMS

Ads that take the form of page content that help tell the brand story by increasing awareness and consideration to visit



TERMINAL-POWERED: ADDRESSABLE AUDIENCES + PROGRAMMATIC

Deploy messaging on high-profile sites using contextual, behavioral and retargeting strategies to custom, data-driven audience through MMGY Terminal

TRAVEL ENDEMIC PLATFORMS

Top travel sites targeting key travel segments and competitive set (Expedia, TripAdvisor, Scoutlook) to drive qualified traffic and maximize exposure in feeder markets

PAID SEARCH

Year-round Google and Bing Search Engine Marketing.

2019 Campaign

RADIO



FAMILIES



Index: 113
Vertical: 83%



WANDERERS



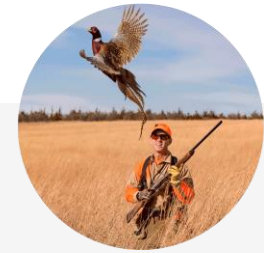
Index: 105
Vertical: 76%



SEARCHERS



Index: 112
Vertical: 81%

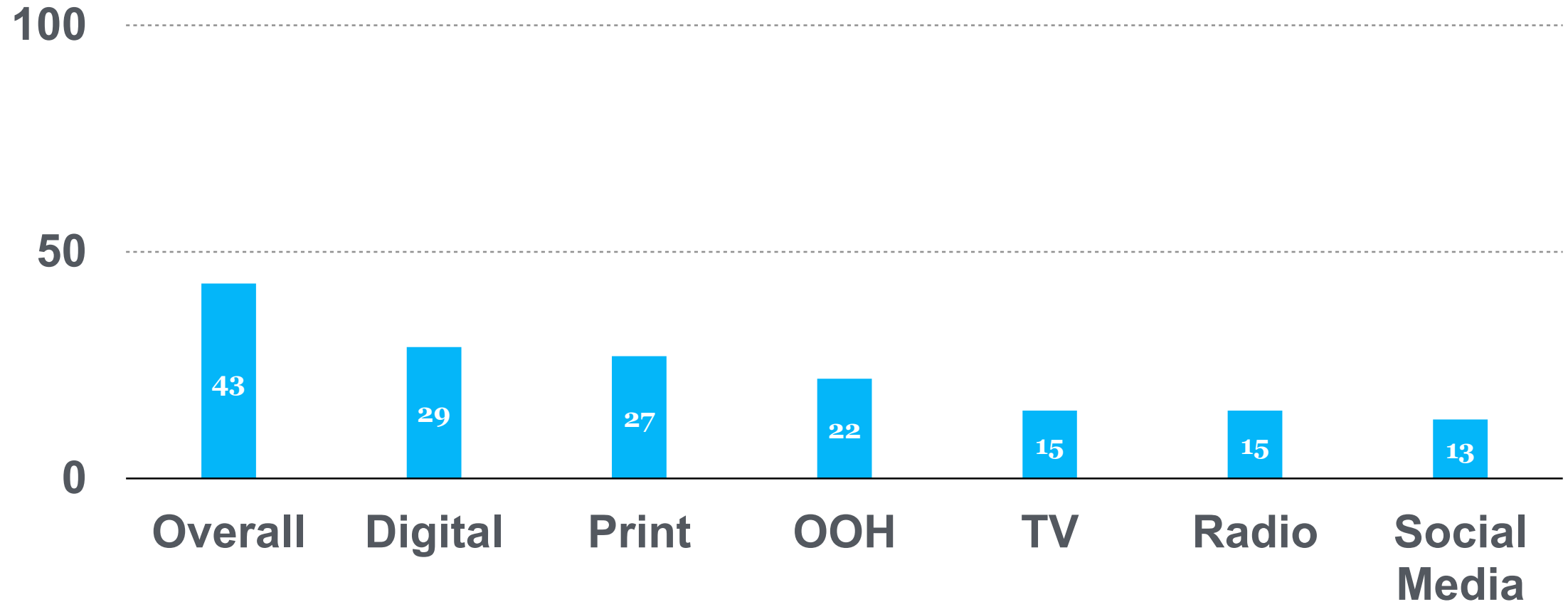


OUTDOORS



Index: 117
Vertical: --%

2018 Campaign Awareness





“

Podcast listeners really are the hyper-engaged, super-supportive audiences everyone hoped.

WIRED MAGAZINE

1/29/2018

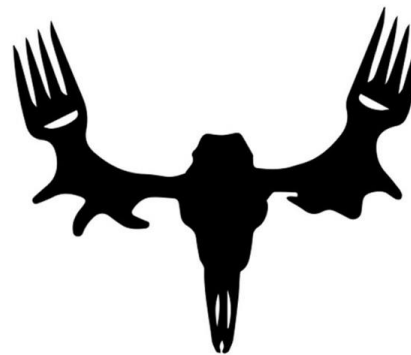
”



0:05

-1:30:15

South Dakota's 100th pheasant season
The Hunting Dog Podcast — October 2



**MEAT
EATER**

Podcast with Steven Rinella

HUNT. FISH. LISTEN.

0:08

-2:21:15

Ep. 130: Packing Gear
MeatEater Podcast — August 19, 2018





STATE GREAT

Thank You





STATE GREAT

Questions?

