



SOUTH DAKOTA

DEPARTMENT OF TOURISM

2021 ANNUAL REPORT

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Dear Industry Partners,

Another year has come and gone. Though the pandemic persists, we have so much to be grateful for, especially the fact that South Dakota's tourism industry is stronger than ever.

In this annual report, you'll find record-breaking numbers that have contributed to the strength of South Dakota's economy and our industry. These numbers are the results of our collective hard work, which continues to drive visitation, generate revenue and create jobs for South Dakotans.

From workforce to infrastructure, we know there are challenges that lie ahead, but I know if we work together, these challenges can be overcome. Thank you for your unwavering support, unity and leadership as we look to the future. I can't wait to see how we grow as a destination in the years to come.

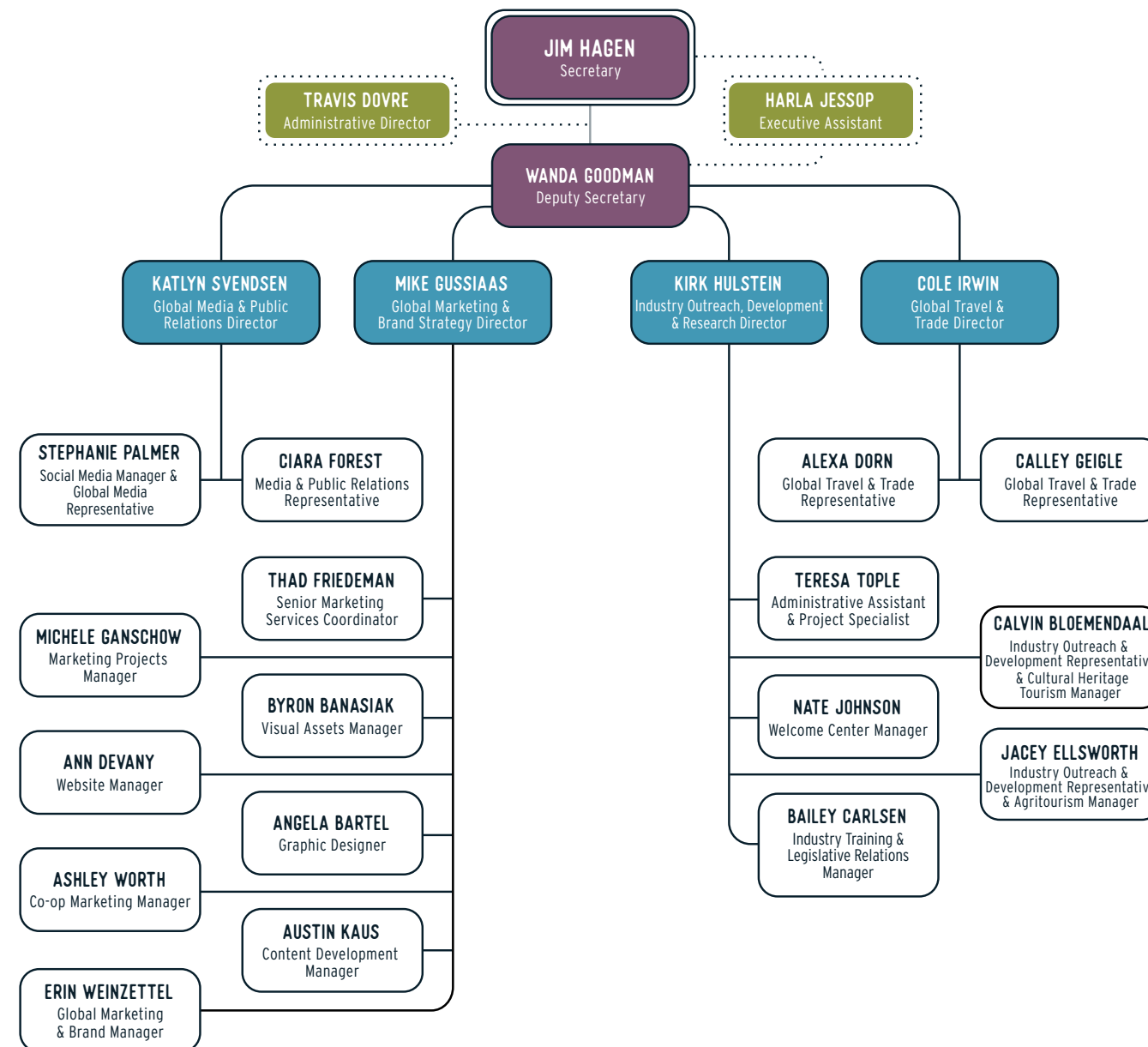
All my best,



James D. Hagen
Secretary, Department of Tourism

SOUTH DAKOTA DEPARTMENT OF TOURISM

SDVISIT.COM



2021 Governor's Tourism Advisory Board

Kristi Wagner, Whitewood // President

Caleb Arceneaux, Rapid City
Tom Biegler, Sioux Falls
John Brockelsby, Rapid City

Carmen Schramm, Yankton // Vice President

Ted Hustead, Wall
Ann Lesch, De Smet
Julie Ranum, Watertown

Val Rausch, Big Stone City
Frank Smith, Gettysburg
Ivan Sorbel, Kyle

ABOUT US



➤ VISION

With a spirit of freedom and optimism, South Dakota's Great Faces and Great Places inspire and unite all visitors and residents through the transformational power of travel.

➤ MISSION

We enhance the quality of life for all South Dakotans by strengthening our communities and their tourism economies, encouraging responsible stewardship of our destination, and creating meaningful experiences for all to enjoy.

➤ VALUES

- Be kind, respectful and understanding.
- Be creative, passionate and open to ideas.
- Be positive and carry a can-do attitude.
- Be collaborative and communicative.
- Be bold and fearless.

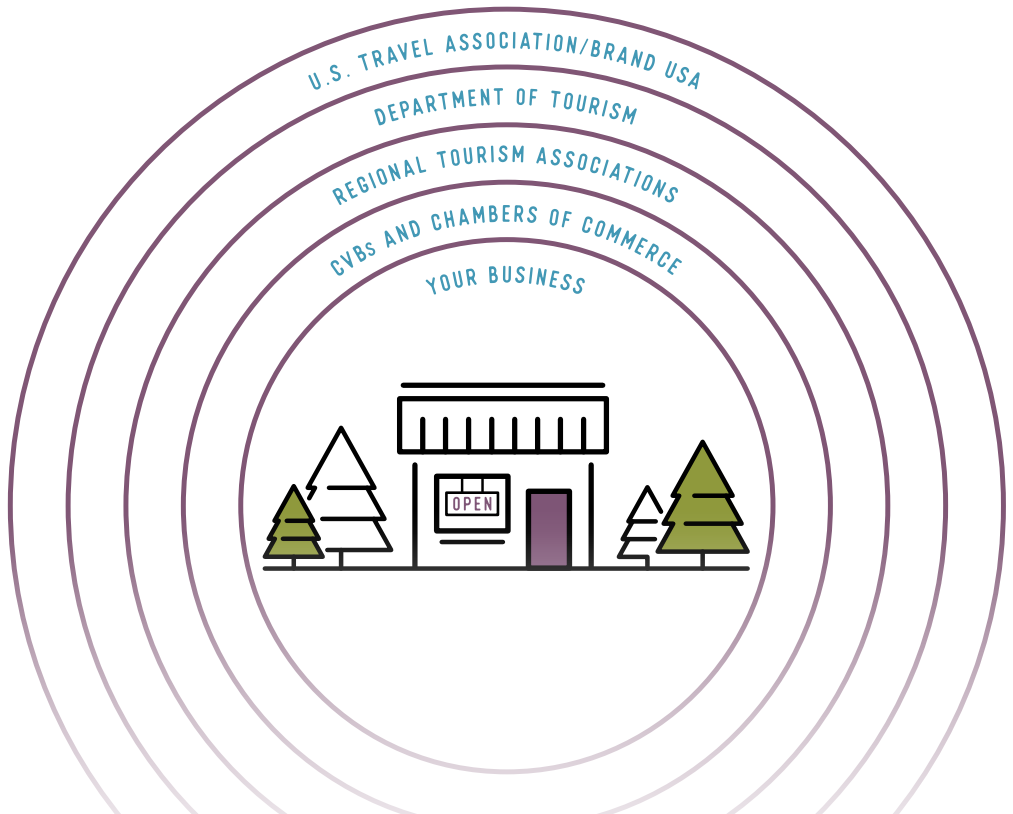
➤ CULTURE

We are proud South Dakotans who share a passion for our state, its people and our beautiful places. Our team strives for excellence in creative marketing, innovative thinking and attentive service to our industry. We take pride in our can-do attitude and aspire to be a leader among state tourism offices nationwide.

➤ MAJOR IMPERATIVES

1. Expand and Enhance the South Dakota Brand
2. Advance the Development of Our Destination
3. Advocate for Responsible Destination Management
4. Prioritize Operational Excellence

From the national level to individual DMOs and tourism businesses within South Dakota, everyone in the tourism industry plays a distinct and specific role.



THE DEPARTMENT OF TOURISM'S ROLE

- Actively work to bring visitors inside South Dakota's borders and promote travel within our state
- Act as a conduit of information and resources from the national level to industry partners

AVAILABLE OPPORTUNITIES

- Access to curated research
- Participation in state-hosted familiarization tours for trade professionals and journalists
- Welcome Center marketing programs
- Photo and video assets
- Co-op marketing programs
- Annual Governor's Conference on Tourism
- Business and event listings on **TravelSouthDakota.com**
- Hospitality programs and training
- Informational and educational webinar series
- Department team members available to speak at meetings and conferences
- Industry website (**SDVisit.com**) provides latest news research, marketing programs and industry events

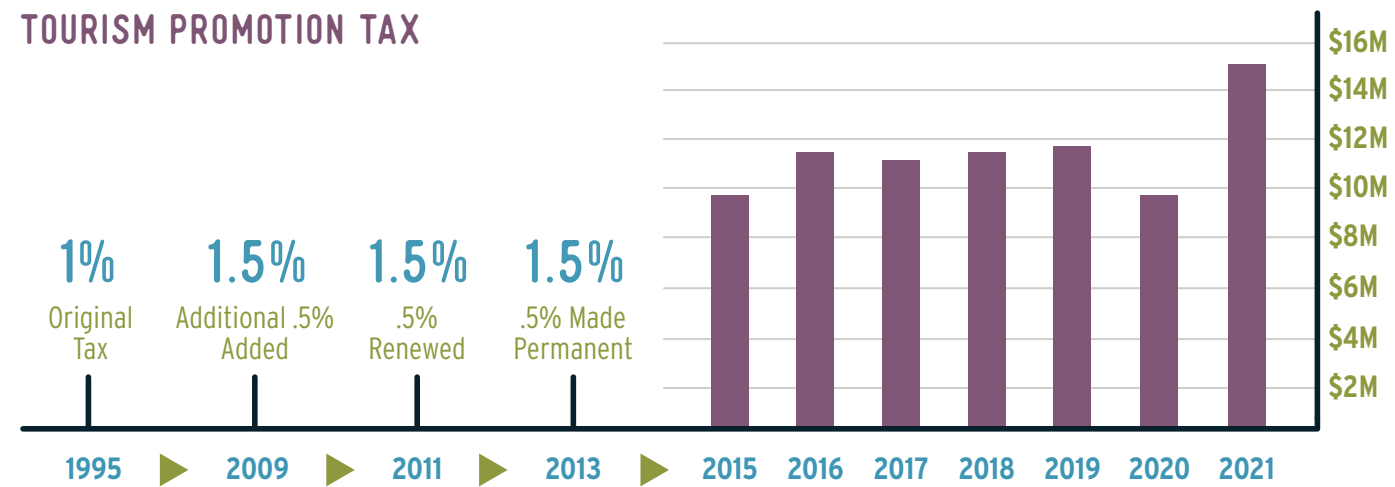
ON YOUR BEHALF

The department promotes South Dakota as a premier travel destination through the following efforts and mediums:

- Global marketing
- Public relations
- TravelSouthDakota.com
- Domestic and international media blitzes
- South Dakota Vacation Guide
- Social media
- 1-800-S-DAKOTA
- Familiarization tours for trade professionals and domestic and international journalists
- Domestic and international consumer and trade shows
- Consumer activations and promotions
- Press releases
- E-newsletters
- Retain memberships in industry and trade organizations including the U.S. Travel Association, National Council of State Tourism Directors, Brand USA and others
- Partnership in the Great American West consortium
- Promotion through five official state Welcome Centers
- Actively advocate for the tourism industry

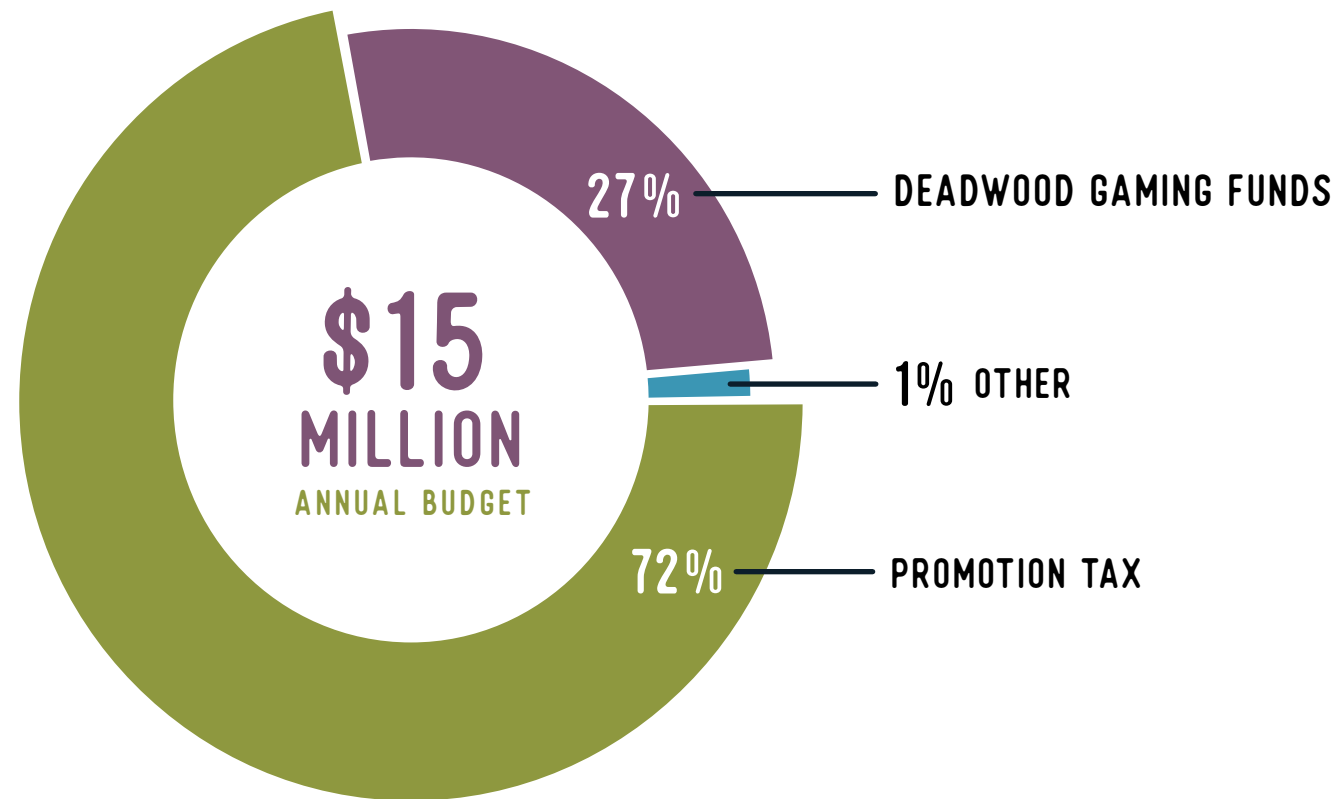


TOURISM PROMOTION TAX

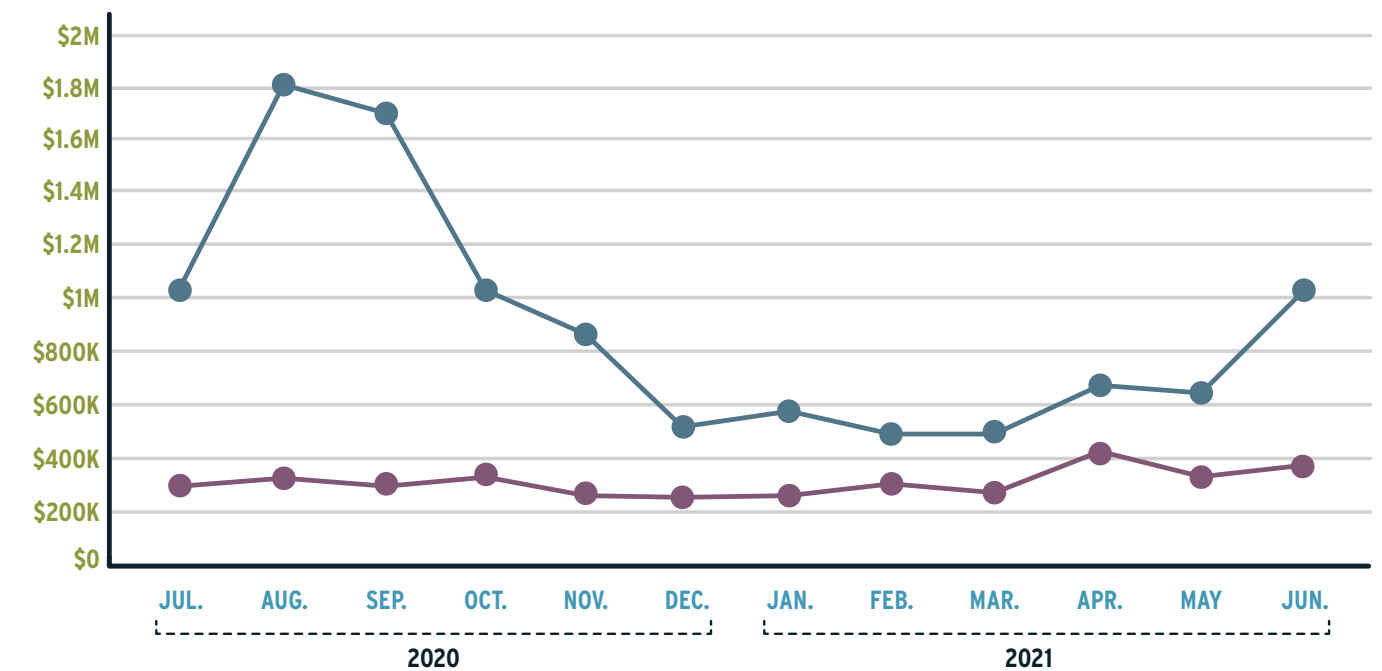


FY21 ANNUAL BUDGET

The Department of Tourism is funded primarily through a 1.5% promotion tax and a percentage of Deadwood gaming funds.



2021 FISCAL YEAR REVENUE CHART



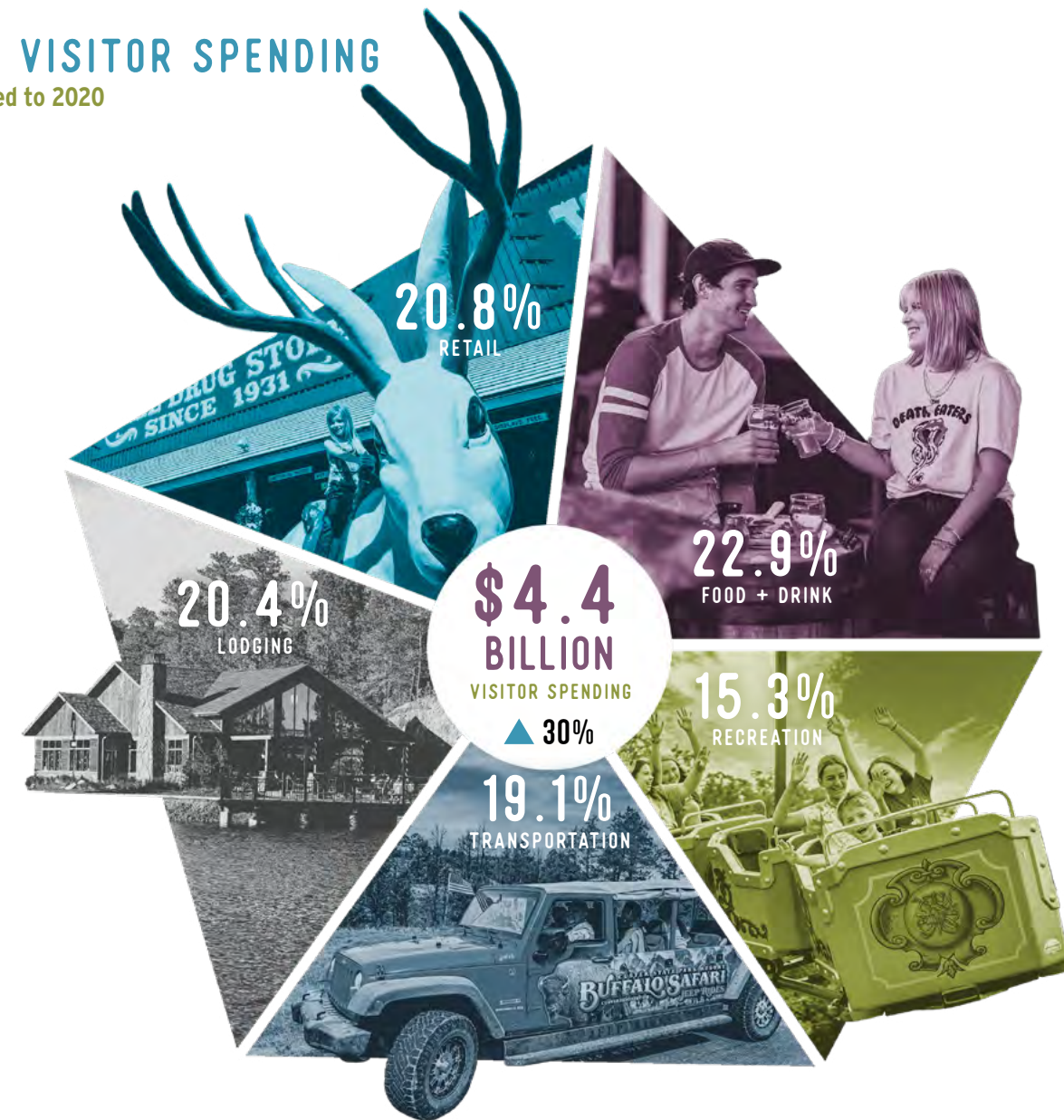
Gaming Total = \$3,922,290

Promotion Tax Total = \$11,260,851



2021 VISITOR SPENDING

Compared to 2020



2021 ECONOMIC IMPACT

Compared to 2020

13.5 MILLION
VISITORS TO SOUTH DAKOTA
▲ 30%

54,208
JOBS SUSTAINED
by the tourism industry. This represents 1 out of 12 jobs in South Dakota.

\$345 MILLION
TAX DOLLARS GENERATED
by travel and tourism activity, representing 11% of state sales tax collections.
▲ 25%

\$980
TAX DOLLARS SAVED
by each South Dakota household because of the tourism industry.

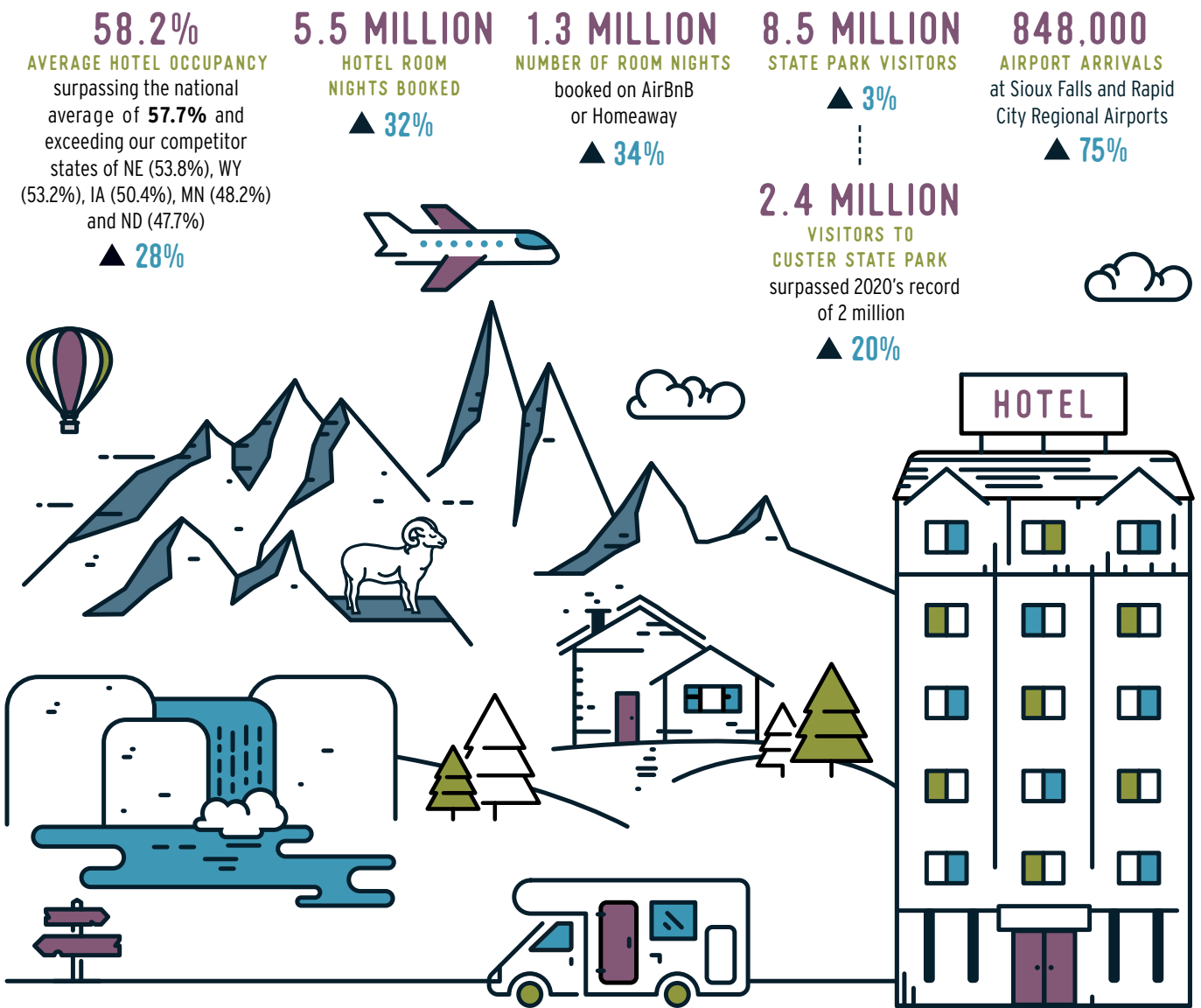
\$2.75 BILLION
TOTAL GDP CONTRIBUTED
This is 5.1% of the state's economy.
▲ 30%

TAXABLE SALES

TAXABLE SALES	2020	2021	% CHANGE
BBB	\$2.255 BILLION	\$2.825 BILLION	▲ 20%
LODGING	\$498 MILLION	\$716 MILLION	▲ 30%
TOURISM	\$761 MILLION	\$1.081 BILLION	▲ 30%

SOUTH DAKOTA TRAVEL INDICATORS

Compared to 2020



ARRIVALIST DATA

The department partners with Arrivalist to track mobile devices, allowing a picture of a visitor's time in market, distance traveled and media exposures. Visitation is defined as anyone traveling more than 75 miles and spending more than two hours in a destination. Using this data, we can monitor and correlate changes in movement and visitation. We can also see where our visitors are coming from, average length of stay and distance traveled.



335 MILES
AVERAGE DISTANCE
TRAVELED



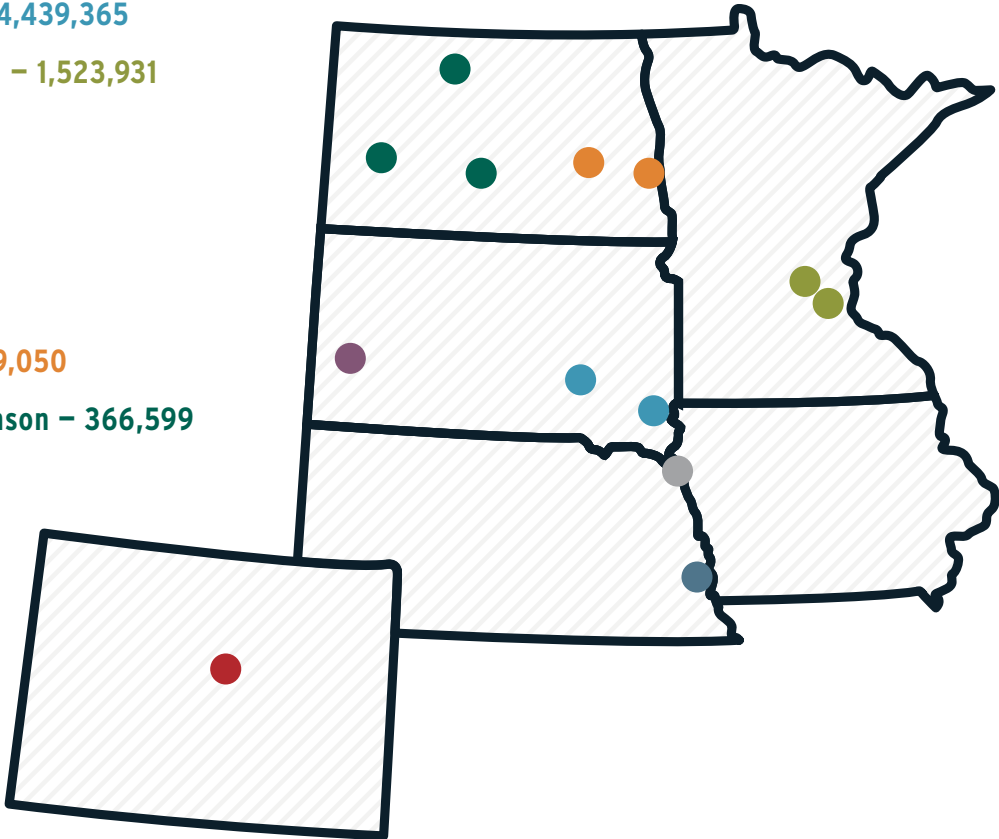
TOP 3
DESTINATION
CITIES
Sioux Falls
Rapid City
Aberdeen



1.2
AVERAGE NIGHTS
STAYED

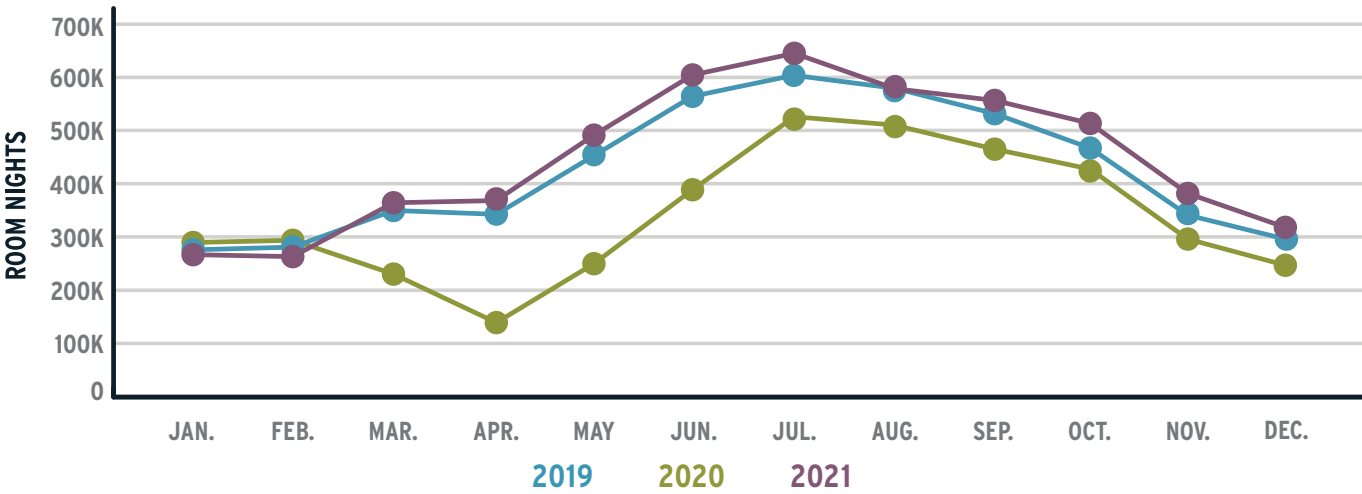
TOP ORIGIN MARKETS

- Sioux Falls/Mitchell – 4,439,365
- Minneapolis/Saint Paul – 1,523,931
- Rapid City – 1,015,997
- Sioux City – 780,895
- Denver – 764,928
- Omaha – 479,073
- Fargo/Valley City – 419,050
- Minot/Bismarck/Dickinson – 366,599



STR DATA

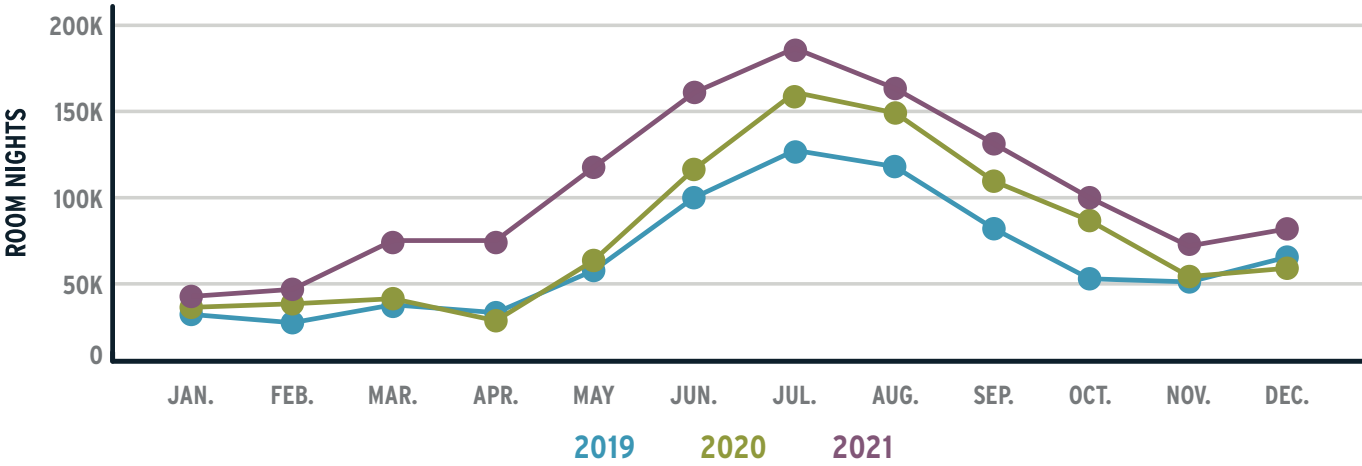
STR (Smith Travel Research) reports on a slew of booking metrics, including hotel occupancy, room nights, daily rates and revenue. This data gives us a holistic look at hotel performance.



58.3%	\$103	\$60	5,495,576	9,433,338	\$567,753,152
OCCUPANCY	ADR	REV PAR	ROOM NIGHTS	SUPPLY	REVENUE
▲ 29.7%	▲ 19.4%	▲ 54.9%	▲ 32.3%	▲ 2%	▲ 58%

AIRDNA DATA

The department partners with AirDNA to measure ADR, occupancy, demand and supply for short term rental properties. As alternative lodging options grow in popularity, it is critical we monitor trends among leisure travelers and all accommodation types.



59.6%	\$103	\$61	1,258,992	2,111,252	\$129,608,869
OCCUPANCY	ADR	REV PAR	ROOM NIGHTS	SUPPLY	REVENUE
▲ 16.8%	▼ 2.1%	▲ 14.3%	▲ 33.6%	▲ 14.4%	▲ 30.7%

PAID MARKETING

780,068,117
IMPRESSIONS

52,693,830
ENGAGEMENTS

1,630,030
INQUIRIES &
CONVERSIONS

\$4.39
COST-PER-INQUIRY
(Digital, Search, Social only)

\$0.19
COST-PER-ENGAGEMENT

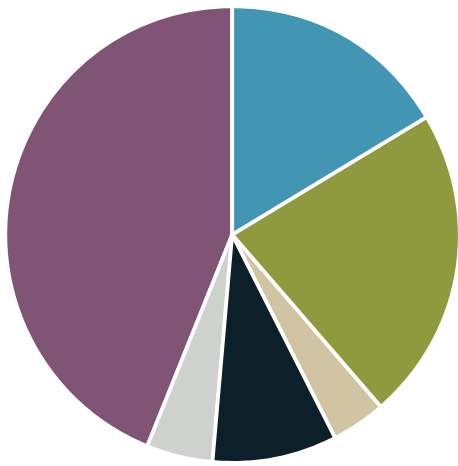
\$0.01
COST-PER-IMPRESSION
(All Channels)



SD TOURISM + COMMUNITY CO-OP MEDIA SPEND

SD Tourism and the Community Co-op partners invested in a variety of media channels to promote South Dakota.

% of spend by media channel



- AUDIO: 17%
- DIGITAL: 23%
- OUT OF HOME: 4%
- PRINT: 9%
- SOCIAL: 5%
- VIDEO: 45%

2021 WEB STATS



3,245,481
SESSIONS
▲ 6%



5,434,794
PAGEVIEWS
▼ 5%



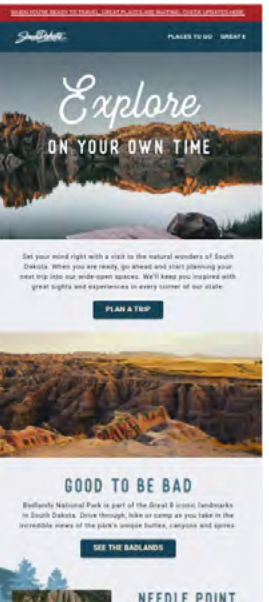
1:49
SESSION DURATION
▼ 16%

Homepage // TravelSouthDakota.com

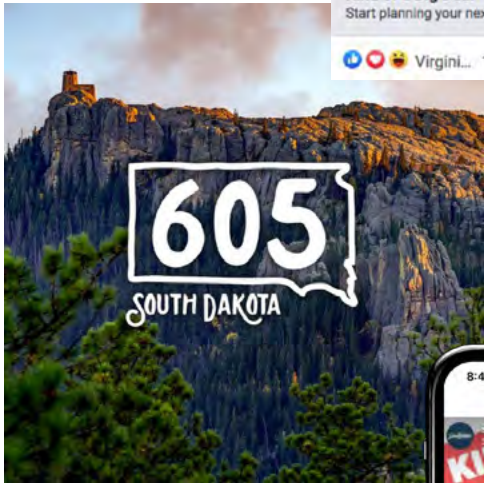


2021 eCRM

- 735,011 active subscribers
- 15.5 million emails sent
- 16% average open rate
- 1.5 million partner emails sent
- 25% average open rate
- June 2021 peak series saw highest click to open rate with 35%



SOCIAL MEDIA



2021 HIGHLIGHTS*

- 47,963,750** Facebook Impressions (down 38%)
3,632,814 Facebook Engagements (down 52.9%)
368,375 Facebook Web Sessions (up 13.6%)
- 1,804,006** Twitter Impressions (down 36.1%)
36,974 Twitter Engagements (down 48.8%)
2,906 Twitter Web Sessions (down 81.5%)
- 16,992,387** Instagram Impressions (up 6.4%)
670,936 Instagram Engagements (up 11.9%)
1,716 Instagram Web Sessions (down 11.1%)

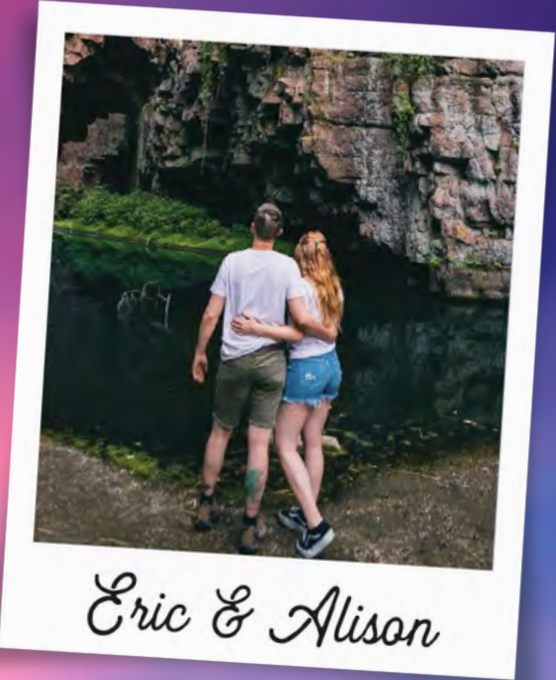
78,040,805
TOTAL IMPRESSIONS
▼ **19%**

2,829,405
TOTAL ENGAGEMENTS
▼ **40.1%**

178,359
TOTAL WEB SESSIONS
▲ **15.7%**

*NOTE: Decreases from 2020 to 2021 are largely the result of a significant decrease in paid social funds YoY as the result of the CARES funds that were granted in 2020. Paid spend on Facebook decreased 44% YoY. Additionally, we opted to reduce our post cadence on Twitter in 2021 in favor of prioritizing other channels, which partially accounts for the decreases in metrics on that channel.

Additionally, the department worked with three influencers to showcase travel throughout the state, resulting in a total of 33,068 engagements and 1,940,073 impressions. Each influencer created high quality content both for social media and for the department to use in upcoming campaign initiatives.

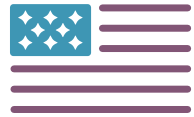


PUBLIC RELATIONS

With a year like no other in 2021, the department's PR strategy was shaped by the pandemic, which heavily influenced the way media covered travel, while hampering journalists' willingness and ability to travel.

That said, while media preferred virtual meetings for most of the year and many regional magazines dropped their travel columns, we did see a rise in the national media heavily focusing on domestic, outdoor exploration and adventure.

The Department of Tourism was able to host six journalists from top-tier regional and national publications in 2021. Personalized itineraries were created around each individual's interests. Publications represented included Matador Network, Forbes, Conde Nast Traveler, UPROXX, TravelAwaits and Wide Open Spaces.



DOMESTIC

134 placements (down 53%)

1.03 billion impressions (down 33%)

\$20.6 million ad value (down 32%)

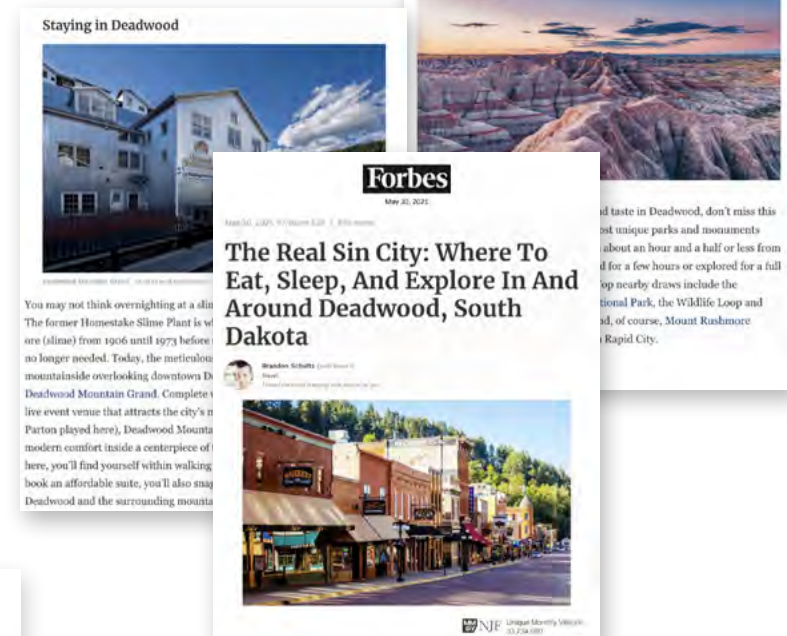
CIRCULATION: 520,390

Resulted from press visit



UVM: 33,734,080

Resulted from Forbes



UVM: 60,653

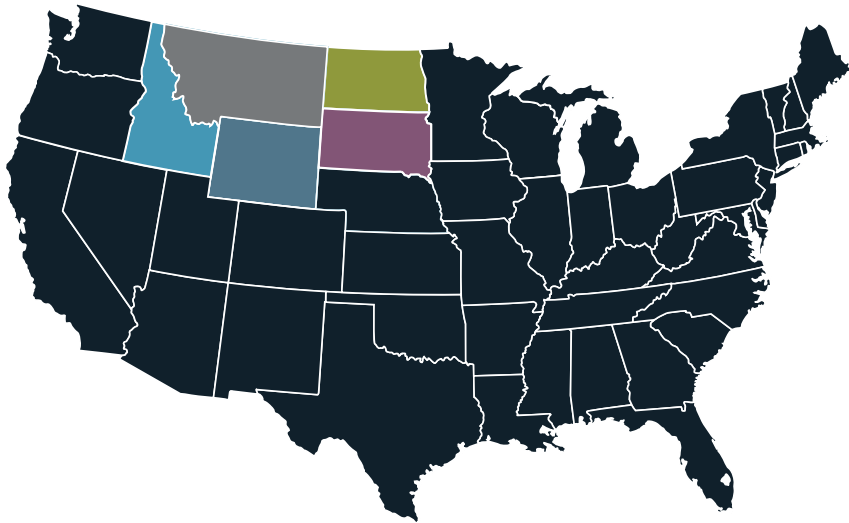
Resulted from press visit





GREAT AMERICAN WEST

The Great American West is the brand for the international travel & trade marketing efforts of the state tourism offices of Idaho, Montana, North Dakota, South Dakota and Wyoming. Collectively, the cooperative contracts with Rocky Mountain International to market the region to travel trade and consumers through advertising and public relations efforts.



FY21 INTERNATIONAL MARKETING RECAP

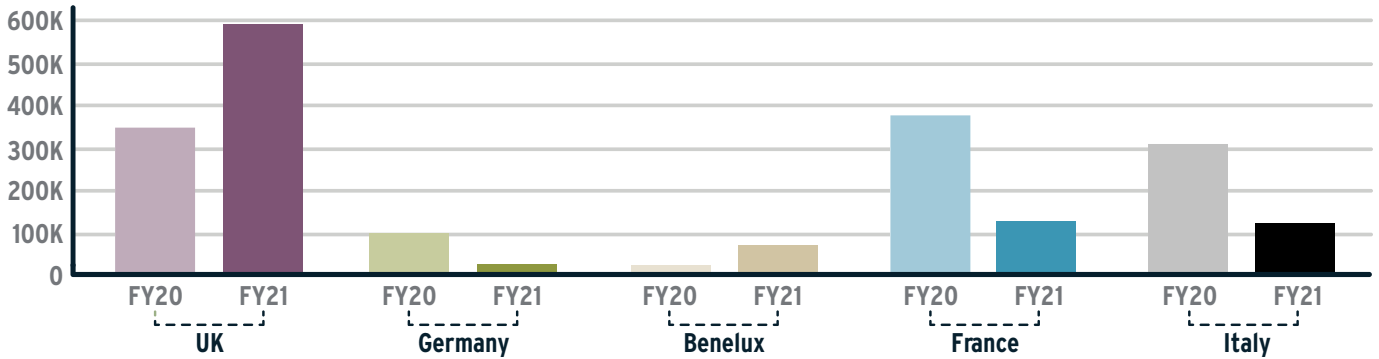


- UK: 16%**
- GERMANY: 12%**
- BENELUX: 5%**
- FRANCE: 14%**
- ITALY: 7%**
- AUSTRALIA: 5%**
(Marketing re-started in July 2021)
- NORDIC: 17%**
(Norway, Sweden, Finland and Denmark. Marketing re-started in July 2021)
- ALL MARKETS: 24%**

EARNED MEDIA COVERAGE: SD

In FY21, South Dakota received **\$971,928.69** in earned editorial coverage, reaching **86.5 million** readers from **120** stories published.

\$971K **YOY** **▲ 66.5%**



YEAR-OVER-YEAR CHANGE IN 5 KEY MARKETS

With International tourism looking to rebound in 2022, South Dakota stayed invested in our core overseas markets of the UK, Germany, France, Italy and the Benelux Region in 2021. Through our diligent outreach efforts to tour operators and travel agents in those markets, we were able to keep most of our tour product active in these markets throughout pandemic, putting us in a strong position to move quickly when international visitation begins to pick up again. The product we did lose, can be attributed to tour companies switching to more inter-country offerings or completely closing during the pandemic. For 2022, in addition to our 5 key markets, the department will be back in Australia/New Zealand and the Nordic countries.

TO's Offering SD Product

Market	2020 TOs	2021 TOs	YOY TO %
United Kingdom	108	102	-6%
Germany	106	106	0%
France	79	79	0%
Italy	81	75	-8%
Benelux	74	66	-12%

Overnights Offered In GAW Region

Market	2020 ON	2021 ON	YOY ON %
United Kingdom	5,241	4,946	-6%
Germany	4,619	5,241	12%
France	3,915	3,916	0%
Italy	3,682	3,440	-7%
Benelux	3,957	3,440	-15%

328 **2020 TOUR OPERATORS**
303 **2021 TOUR OPERATORS**
▼ 8% **YOY**

3,279 **2020 SD OFFERED OVERNIGHTS**
3,146 **2021 SD OFFERED OVERNIGHTS**
▼ 4% **YOY**

2021 YEAR IN HIGHLIGHTS



JANUARY

GREAT AMERICAN WEST VIRTUAL SALES MISSION

With international travel still on hold, the Great American West sought to stay top-of-mind with international travel agents and tour operators. Alongside the state tourism offices of Idaho, Montana, North Dakota and Wyoming, the department held 23 trainings with operators from the United Kingdom, Germany, France, the Benelux countries and Italy. In total, the team trained 30 tour product developers in key international markets.



FEBRUARY

NEW ONLINE HOSPITALITY TRAINING MODULE

To continually provide up-to-date and relevant training for the industry, the department added a new module to its online hospitality training program. The new module focuses on providing exceptional hospitality by going above and beyond to personalize customer service. Lessons include specific South Dakota knowledge, how to connect with visitors, cross-selling the state and a region-specific quiz. More than 500 industry members completed the training in 2021 – a record number.

SOLD ON SOUTH DAKOTA PRESIDENTS' DAY CAMPAIGN AND ACTIVATION

For the third year in a row, the department launched a Presidents' Day campaign to reclaim the Mount Rushmore imagery often associated with the holiday's sales. The 2021 campaign leveraged a mix of paid and owned media tactics to promote travel incentives to visit South Dakota with a dedicated landing page.



PRESIDENTS' DAY CAMPAIGN PAID MEDIA

Campaign performance was strong, reaching not only impression and engagement goals, but resulting in tangible direct benefits such as travel bookings and room nights.

Paid Media Results

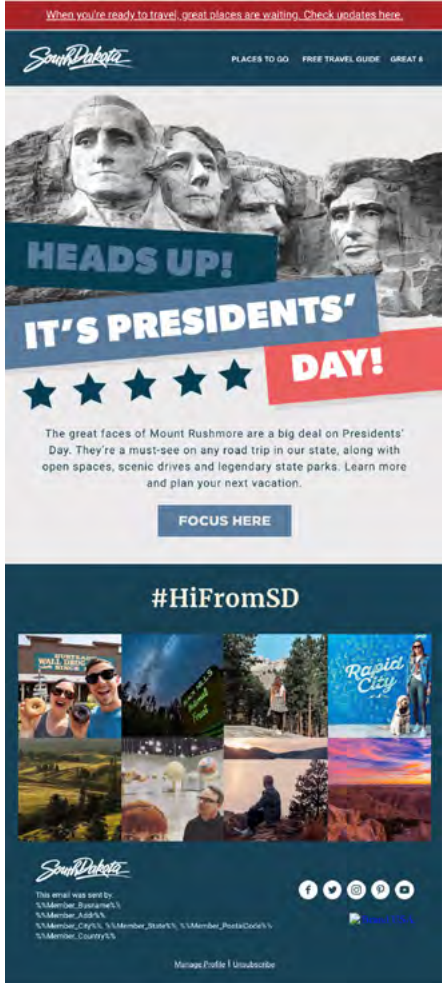
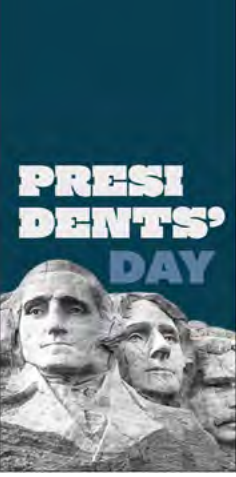
- 26,677,973 total impressions
- 2,854,021 total engagements
- \$0.09 cost-per-engagement



Source: ADARA Impact; Expedia

PRESIDENTS' DAY CAMPAIGN SITE ENGAGEMENT

Sold on South Dakota Landing Page	
Sessions	40,648 (+191% YOY)
Pageviews	47,447 (+162% YOY)
New Users	35,725 (+178% YOY)
Bounce Rate	84% (+25% YOY)
Avg. Time Spent	0:01:01 (-56% YOY)
Video Views	1,467 (+130% YOY)



PEAK SEASON MARKETING

After carefully monitoring travel sentiment and conducting message testing, the department launched a new phase of peak season creative, transitioning from “Great Places are Waiting” to “Go Great Places.” The revamped campaign was our largest peak effort ever, and encouraged people to embark on road trips, explore outdoor destinations, seek wide open spaces and visit South Dakota when the time was right for them.

Campaign Goals

- Inspire travelers about the joys of travel.
- Reframe the narrative about South Dakota.
- Build on the department’s CARES Act investment and strategies from late 2020.

The 2021 campaign employed a stacked-marketing strategy for targeted viewers, utilizing touchpoints across mediums. This multi-channel effort included broadcast, cable and connected television; online and interactive video; outdoor/out-of-home (OOH); national and large-circulation regional magazines; direct mail; digital; social; search engine marketing (SEM); traditional and online radio; and podcast sponsorships.

AUDIENCES

Families

- Age 25-44
- Children in the household and traveling with them.
- Interested in leaving a lasting impression on their children and making meaningful connections with each other.



Searchers

- Age 25-44
- No children in traveling party.
- Come to South Dakota to “do” by experiencing outdoor activities, along with local food and culture.

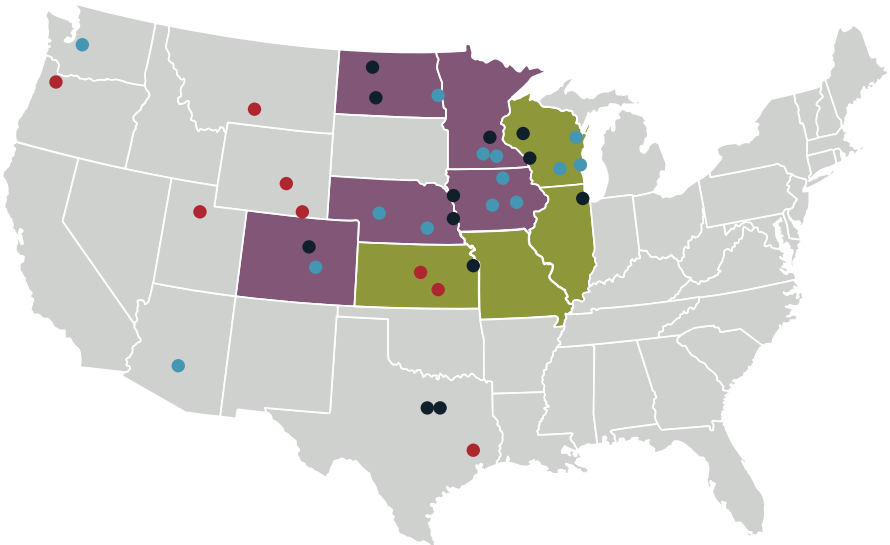


Wanderers

- Age 50+
- No children in the household.
- While they represent a mature audience, they still want bucket-list experiences and breathtaking sights to remember.



COMPREHENSIVE MARKET MAP



- PRIMARY MARKETS
- PRIMARY METRO MARKETS
- SECONDARY MARKETS
- SECONDARY METRO MARKETS
- TERTIARY MARKETS
- SPECIFIC TERTIARY METRO MARKETS

245,566,636
TOTAL PEAK
CAMPAIGN IMPRESSIONS

197,600
TOTAL ROOM
NIGHTS BOOKED

11,354,803
TOTAL PEAK
CAMPAIGN ENGAGEMENTS

2,228,977
WEBSITE USERS TO
TRAVELSOUTHDAKOTA.COM
DURING CAMPAIGN
▲ 13% YOY



PEAK SOCIAL EFFORTS

To inspire the department’s audiences to “Go Great Places” when ready, the social team set out to drive social media engagement, website referrals and overall awareness of South Dakota throughout peak season. Campaign objectives were met through a social media campaign heavily focused on socially optimized video content with a phased approach.

1,563,915
ENGAGEMENTS*

27,526,391
IMPRESSIONS*

602,067
VIDEO VIEWS

70,321
REFERRALS TO
TRAVELSOUTHDAKOTA.COM

*Campaign engagements and impressions include owned channel results (paid + organic), influencer results and AR performance



MARCH

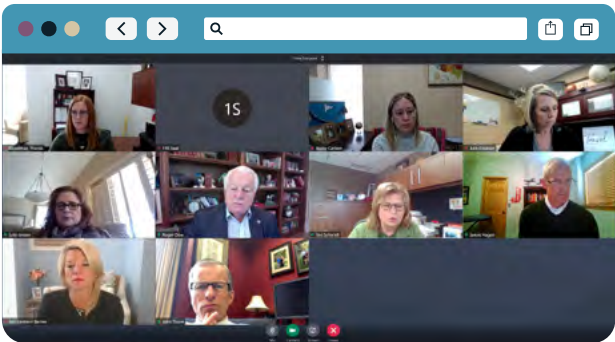
GO WEST VIRTUAL SUMMIT

From March 1-5, the Global Travel & Trade team met with 44 travel companies during the Go West Virtual Summit. The summit introduced the world’s top international tour operators to specialty suppliers offering tourism-related products or services in the American West.

During the 30-minute Zoom appointments, the team inspired companies with all that South Dakota has to offer, reaching representatives from the United States, Germany, France, the Netherlands, China, Canada, Japan, Ireland, Australia, Argentina and Italy.

DESTINATION CAPITOL HILL

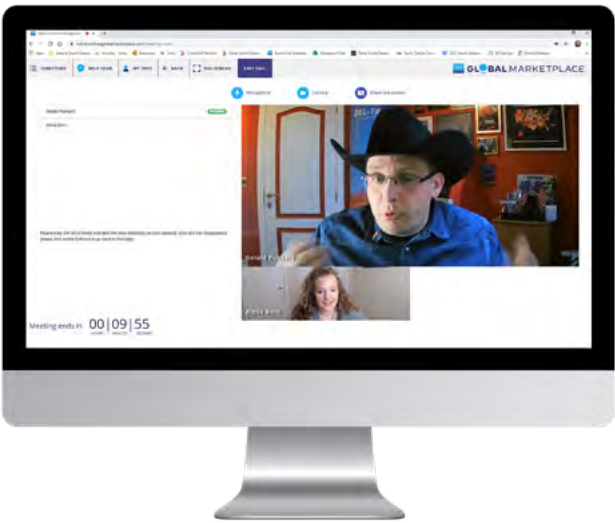
Due to the pandemic, the annual legislative fly-in for the tourism industry was held virtually for the second year. Department team members had the opportunity to meet virtually with Senator John Thune, Congressman Dusty Johnson and a representative for Senator Mike Rounds. The meetings covered travel’s importance to South Dakota as well as some of the most pressing challenges facing the national travel and tourism industry.



BRAND USA VIRTUAL GLOBAL MARKETPLACE

From March 15-18, the Global Travel & Trade team had the opportunity to meet with 28 global travel companies during the Brand USA Marketplace one-on-one meetings. The virtual event provided the department the opportunity to connect with international buyers who have a strong interest in leveraging opportunities to increase international visitation to the United States.

During the 16-minute video meetings, the team was able to inspire companies with wide open spaces, unique attractions, national and state parks, and outdoor adventure opportunities in all regions of the state. Companies represented were from Germany, Spain, Belgium, Italy, the United Kingdom, the Netherlands, Norway, Sweden, Ireland and Denmark.



APRIL

NATIONAL TV LAUNCHES WITH GOVERNOR NOEM

Governor Kristi Noem understands the importance of tourism in South Dakota and is one of the industry’s greatest supporters. With South Dakota remaining open – and the majority of travelers wanting to experience nature and the outdoors in 2021 – the department invested in additional placement for the peak 2021 campaign, adding a national TV buy to reach those most interested in South Dakota.

The team wanted to extend the department’s reach to an audience outside of those reached by other peak efforts. To optimize budget and align the message with those most likely to act on it, the department used data-first, programmatic targeting to reach those with positive perceptions of South Dakota. This strategy utilized the department’s existing message, with Governor Noem encouraging people across the U.S. to explore South Dakota when the time was right for them.



IMPRESSIONS: 137 MILLION
113% to goal

VIRTUAL MEDIA TOUR

The department engaged in virtual media conferences with five journalists from regional and national publications on individual virtual media tours in 2021. The virtual meetings offered a great opportunity to seed future trips to South Dakota.



COMMUNITY CO-OP PARTNERSHIPS

The community co-op marketing program has proved to be an integral part of the department's overall marketing success. These locally focused campaigns provide community-level information that travelers are looking for as they proceed down the travel-planning funnel while still tying into the bigger South Dakota brand and messaging. These efforts paid off big in 2021, far exceeding goals.

263,657,239

IMPRESSIONS

17,191,617

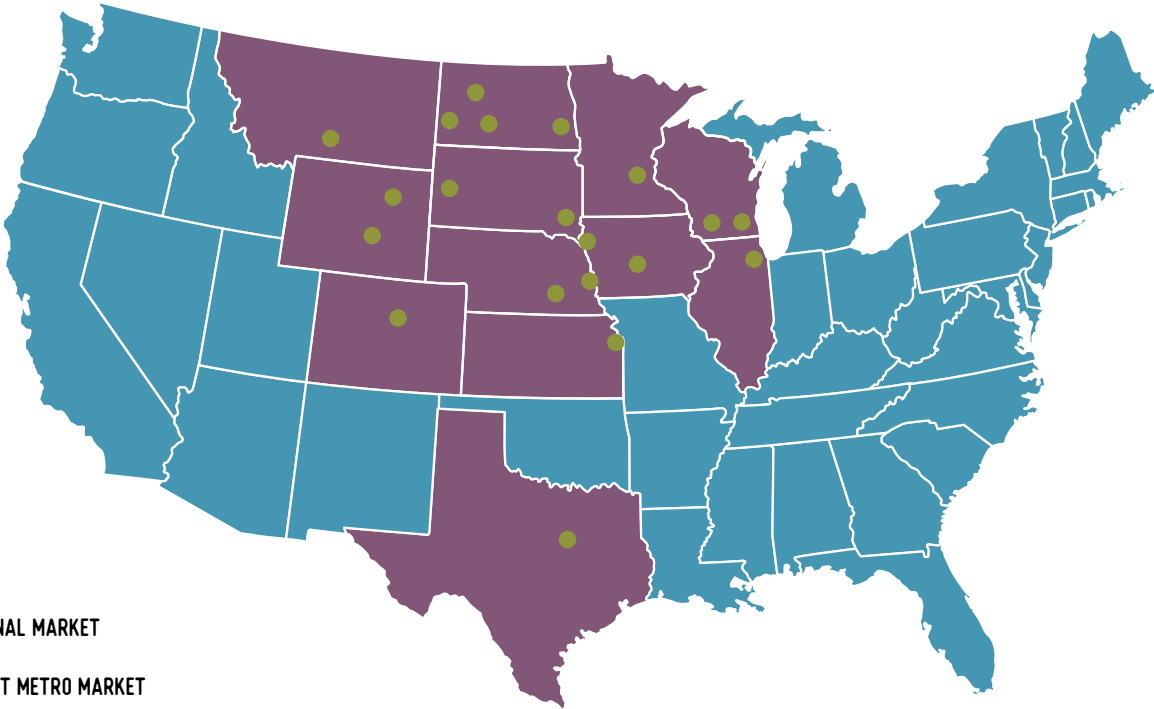
ENGAGEMENTS

\$97,019,447

BOOKING REVENUE



CO-OP CAMPAIGN MARKETS



MAY

NATIONAL TRAVEL & TOURISM WEEK

National Travel & Tourism Week in 2021 was close to “normal” as the department conducted press conferences with Governor Noem at both Mount Rushmore and Falls Park. We also brought free hospitality trainings to six communities across the state.

Additionally, 10 of South Dakota’s destination icons joined in the celebration, lighting up red in honor of travel.

It is estimated the department earned 68,080,452 impressions in local media news coverage.



LAUNCH OF AGRITOURISMSD

Agritourism, the crossroads of tourism and agriculture, is a growing niche in South Dakota. As part of the department’s strategic plan, the team partnered with SDSU Extension to develop the AgritourismSD program. AgritourismSD is a two-year intensive educational program designed to provide the tools and skills necessary to develop an agritourism business.

The first meeting of AgritourismSD included 22 participants from across South Dakota. The class held face-to-face workshops, interactive webinars and out-of-state learning experiences. Workshop topics included “What is Agritourism?”, exploring community assets, financial and business planning, risk protection, marketing, hospitality and other topics.

In 2021, the class traveled to North Dakota to visit rural communities and successful agritourism businesses.

“OUR (SOUTH DAKOTA) DEPARTMENT OF TOURISM IS AN AMAZING PARTNER AND SUPPORTING US IN SO MANY WAYS. THEY WANT TO SEE THESE AGRITOURISM BUSINESSES DEVELOP AS BADLY AS THE PARTICIPANTS DO, AND THAT IS REALLY HELPFUL.”

STACY HADRICK,
SDSU EXTENSION ASSOCIATE



GAW INTERNATIONAL ROUNDUP VIRTUAL SUPPLIER SEMINAR

This free, three-hour virtual seminar was offered for any South Dakota tourism destination or business looking to learn more about the international tourism industry. The seminar featured pre-recorded messages from each of the Great American West states, an international market update, an international tour operator panel, Brand USA update and a receptive workshop. With more than 120 seminar participants, the event was a great success.

VIRTUAL ABA

The Global Travel & Trade team met with 19 tour operators through the American Bus Association one-on-one virtual Marketplace. Many of the tour companies were looking to expand their product to accommodate the pent-up demand they were seeing from their clients. Many operators focused on increasing tours to South Dakota to expand their product offerings and highlight natural tours. The team followed up with the tour companies’ needs and pitched familiarization tours for late summer 2021. This is how the team first contacted Destination America, who ultimately developed a new Native American tour for 2023.



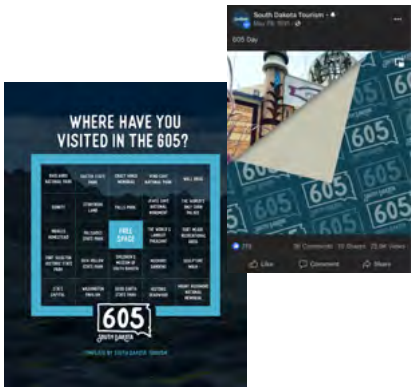
JUNE

605 DAY

The goal for 605 Day was to create awareness and further establish this special day within our social community and beyond. The campaign was driven by social media content and primarily targeted current fans, especially those in drive markets. Supporting social content included a scavenger hunt, reels and a video incorporating clips from content creators around the state highlighting what they love about South Dakota.

Highlights:

- 1,446,054 impressions
- 54,838 social engagements
- 336,179 video views



HUNT THE GREATEST CAMPAIGN

In 2020, the Department of Tourism and the Department of Game, Fish & Parks came together to market the state's pheasant hunting opportunities through the development of a pheasant hunting marketing workgroup. Its mission was to work together as stewards of the state with the shared goal of bringing in more pheasant hunters and introducing new audiences to the traditions of pheasant hunting.

NEW FEMALE HUNTER AUDIENCE

After a successful first year, the campaign continued in 2021 with an evolved focus on retaining the hunters recruited in the first year of the campaign as well as adding a focus on female hunters. Focus groups and research conducted by the department showed that despite a high bar for entry, women are the fastest-growing segment in hunting. The 2021 campaign featured documentary-style videos of sportswomen telling their story, showing that South Dakota's fields are an open place for everyone.

39,405,856
IMPRESSIONS

96,961
NON-RESIDENT
PHEASANT LICENSES
▲ 19%

3,246
YOUTH SMALL
GAME LICENSES
▲ 83%

\$1.74 MILLION
TOTAL LICENSE
REVENUE



SD X WY TOURISM PARTNERSHIP

The Department of Tourism has long had a partnership with the Wyoming Office of Tourism to promote to the international travel trade and media. In 2020, the opportunity presented itself to partner together on a domestic campaign that promoted a modernized "Black to Yellow Trail." Due to the campaign's success, the states continued their partnership in 2021.

Objectives:

- Develop cooperative opportunities to generate higher level awareness and exposure of the two neighboring states.
- Drive engagement with key travel resources and publishers; align with contextually relevant, premium content.
- Maximize ongoing consumer enthusiasm for drive travel and outdoor activities with "Black to Yellow" road-trip ideas.



27 MILLION
IMPRESSIONS

269,000
ENGAGEMENTS

EPIC TRAILS PARTNERSHIP

In 2021, the Department of Tourism partnered with Epic Trails, a TV series that follows wilderness adventurer Eric Hanson on his journey to discover the world's most amazing trails.

Eric and his crew were hosted in South Dakota from June 24-July 1, when they hiked the Centennial Trail and captured photos and video for a South Dakota episode to air in 2022.

Highlights:

- 11 Instagram posts
- 21 Instagram stories
- 1 Facebook post
- 217,593 total impressions





JULY

SOUTH DAKOTA LEADS THE NATION IN TRAVEL & TOURISM RECOVERY

According to an economic impact report from the U.S. Travel Association, South Dakota led the nation in travel and tourism recovery following the pandemic.

DESTINATION AMERICA FAMILIARIZATION TOUR

To continue the development of Native American tourism in South Dakota, the Travel & Trade team hosted Anina Grasso from Destination America on a familiarization (FAM) tour of the state's Native American experiences. Destination America designs tours for some of the world's most influential group tour companies such as Trafalgar, Insight Vacation Groups, Cost Saver, Titan and Saga.

After the FAM, Trafalgar decided to move ahead with a brand new 2023 Native American South Dakota Tour that will spend six days exploring the state from Rapid City to Pine Ridge to Rosebud and Chamberlain before heading into North Dakota. This tour is a tremendous win for Native American tourism in South Dakota.



DIGITAL VIDEO DISPLAYS AT WELCOME CENTERS

Starting in July, the department began showing regional videos of South Dakota in the welcome centers at Wilmot, Valley Springs and Vermillion. These looping videos feature attractions and geography highlights from each of the state's four regions, providing travel inspiration to visitors stopping at the centers.



AUGUST

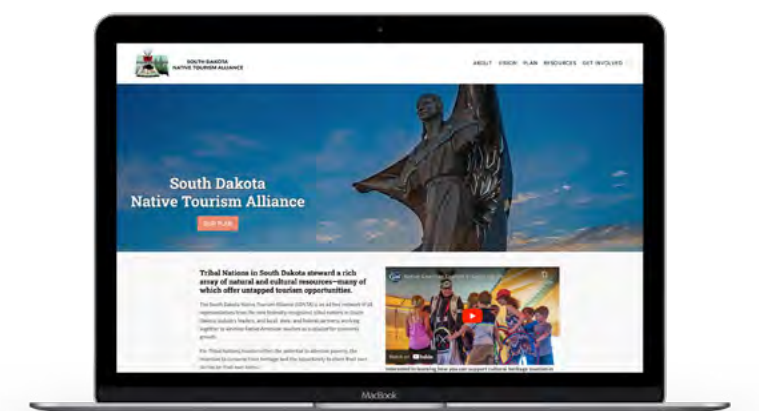
SDNTA OFFICIAL LAUNCH

The South Dakota Native Tourism Alliance was formed out of a partnership between the nine tribal nations of South Dakota, and local, state and federal partners. The group first met in 2019 to establish a shared vision for their work, and officially launched in 2021 with a strategic plan to guide the growth of Native American tourism efforts in South Dakota.

The alliance envisions that by 2025, Tribal Nations will be actively working to develop Native American tourism experiences that will benefit local economies in Native American communities.

Alliance Goals:

1. Create and deliver iconic Native American experiences
2. Improve infrastructure and placemaking
3. Enable tourism business success and viability
4. Prepare both community and a skilled workforce for tourism
5. Increase awareness of Native American tourism offerings in South Dakota among key market segments
6. Manage tourism collaboratively



MOTORCOACH VIDEO PRESENTATIONS

The Global Travel & Trade team knew they needed to stay in front of motorcoach operators to keep South Dakota top-of-mind as travel continued to rebound. Working with 15 CVBs across South Dakota, the team developed five-minute presentations that motorcoach operators could use for inspiration when designing itineraries.

The videos were posted to the South Dakota Travel Professionals website. The team also includes them in trade show follow-up communication and in their e-newsletters.

REBRANDED ROOSTER RUSH PROGRAM LAUNCHES

With communities across South Dakota welcoming pheasant hunters, the Department of Tourism once again led the Rooster Rush program, distributing more than \$12,000 to 28 entities in 26 communities, to be used toward Rooster Rush branded swag, marketing and general promotion of pheasant hunting. The program underwent a rebranding in 2021, unveiling a new logo for use in marketing and on promotional items.



STRATEGIC PLANNING STAKEHOLDER RETREAT

The creation of the department's new strategic plan began in July 2021 with the launch of a comprehensive industry survey that would help the department understand the challenges the industry was facing and the strategic priorities that were most important over the next three years.

Once the survey was complete, a stakeholder retreat was held in August to dive deeper into the various insights the department received from the survey. Participants included nearly 70 industry stakeholders from all four tourism regions, with leaders representing all facets of the industry.

The final plan includes four major imperatives that will provide guidance and focus to the department's efforts over the next three years. The four imperatives are:

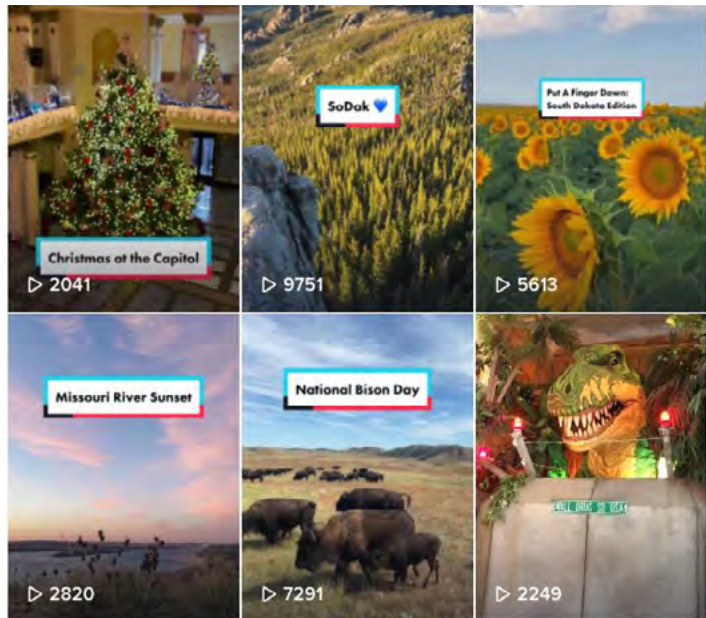
1. Expand and Enhance the South Dakota Brand
2. Advance the Development of Our Destination
3. Advocate for Responsible Destination Management
4. Prioritize Organizational Excellence



LAUNCH OF A SOUTH DAKOTA TIKTOK CHANNEL

In August the department launched its official TikTok channel, providing another avenue for the team to reach its audiences with engaging and inspiring video content. Results in the channel's first five months were impressive.

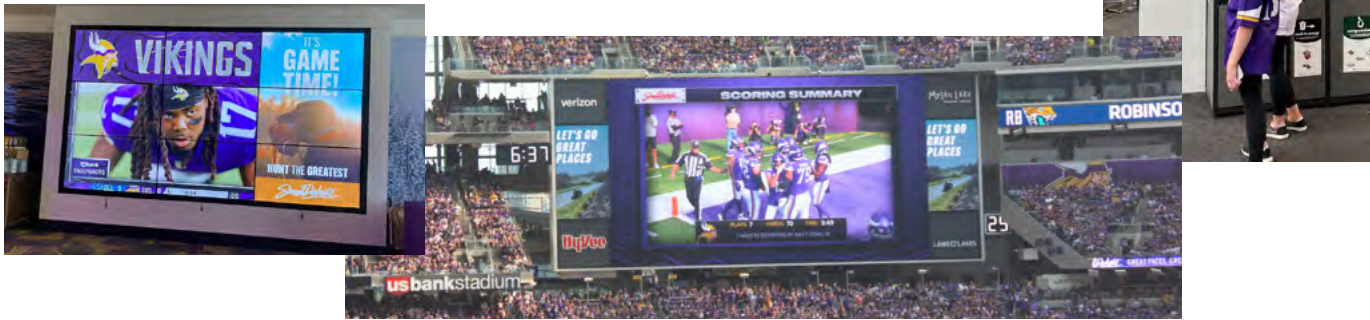
- Total followers: **11,054**
- Total views: **553,927**
- Total likes: **68,530**
- Total comments: **1,645**
- Average engagement rate: **13.97%**



SEPTEMBER

VIKINGS EVERGREEN PLACEMENT

Launching on September 26, the department once again partnered with the Minnesota Vikings to reach football fans in and around Minneapolis attending Vikings games at US Bank Stadium. The campaign ran through the end of the regular season and included placement on in-game videoboard after each scoring drive as well as exposure across 2,000+ in-stadium televisions throughout the game. In addition to in-stadium promotion, radio placements ran during in-game broadcasts and the Vikings Radio Show on KFAN. Display banners were featured on Vikings.com and as part of Vikings Victory emails. The department also received a dedicated email and was a presenting partner of Skol Scribbles, an interactive social contest targeting fans.



BUFFALO ROUNDUP EVENT AND LIVESTREAM

Continuing the success of the 2020 Buffalo Roundup livestream, the department once again collaborated with Custer State Park and South Dakota Public Broadcasting (SDPB) to livestream the annual Buffalo Roundup. While a record 22,000 visitors made the trip to watch the roundup live in person, another 53,000 people tuned into the livestream.

Additionally, the tourism team hosted five media members in South Dakota, representing publications such as BuzzFeed, Budget Travel, The Points Guy, the Cedar Rapids Gazette and The Wander Club. In addition to the main Buffalo Roundup event, these media members explored a variety of attractions throughout the Black Hills.

Hosting Results:

- **5** published stories
- **9** Instagram posts
- **51** Instagram stories
- **1** YouTube video
- **2,254,036** total impressions



IPW

The U.S. Travel Association's 2021 IPW trade show was the Global Travel & Trade team's first in-person trade show since the start of the pandemic. IPW is the largest international travel trade show in the United States and welcomes tour operators, travel agents and media from around the world. The 2021 event was hosted in Las Vegas from September 19-24. The team had 40 pre-scheduled appointments going into the show, and also welcomed roughly 15 drop-in appointments over the three days of the show. Overall, the outreach was a success, with many international tour operators reporting their clients are looking for more rural, outdoor destinations like South Dakota.

DALLAS TRAVEL & ADVENTURE SHOW

In-person outreach continued with the Dallas Travel & Adventure Show, where the department provided information to potential visitors eager to get out and explore.



OCTOBER

TRAVEL WEEK LONDON

In late October, the Global Travel & Trade team attended Brand USA's Travel Week in London, marking the team's first international outreach trip since February 2020. The weeklong event was designed to bring together key players in the U.S. and European travel industry to discuss trends, challenges, innovations and the opportunity to drive future visitation to the United States. The team was able to conduct 42 pre-scheduled appointments with U.S. specialist tour operators from across Europe. During these appointments the team was able to educate and build relationships with influential travel trade professionals from key markets.



WIDE OPEN SPACES HOSTING

In the fall, the PR team hosted the crew from Wide Open Spaces, a hunting and outdoor media outlet. The Wide Open Spaces team had a comprehensive hunting experience on both private and public lands. Their two articles featured Aberdeen as a wing-shooter's paradise and noted "South Dakota may offer the best pheasant hunting on earth." The crew experienced a guided hunt at R&R Pheasant Hunting, a public land hunt near Aberdeen, spent time in the community of Aberdeen, and interviewed a Department of Game, Fish & Parks representative about pheasant hunting in the state.

The hosting has resulted in two articles thus far in Wide Open Spaces, which has a UVM (unique visitors per month) of 520,390.



NOVEMBER

MACY'S THANKSGIVING DAY PARADE

Featuring American country music star Chris Lane, South Dakota's "Mount Rushmore's American Pride" float appeared in the Macy's Thanksgiving Day Parade® for its 12th year. The 2021 parade returned as a "live spectator event" after being virtual in 2020. The excitement shone, as the 2021 parade was one of the largest in Macy's history.



Highlights:

- NBC's broadcast reached 25.4 million viewers
- #1 highest entertainment telecast of 2021 in age 18-49 and total viewers
- NBC's broadcast earned a 6.4 rating in the 18-49 age demo

GREAT ATE THANKSGIVING CAMPAIGN

Leading up to the holidays, the department launched the Great Ate campaign to capitalize on the peak season for cooking and baking, with the goal of driving social media engagement, sweepstakes entries and website referrals. The Great Ate included a contest hosted on our social channels, inviting audiences to submit their favorite holiday recipes for the chance to be included in a physical Great Ate cookbook.

Topline Results*:

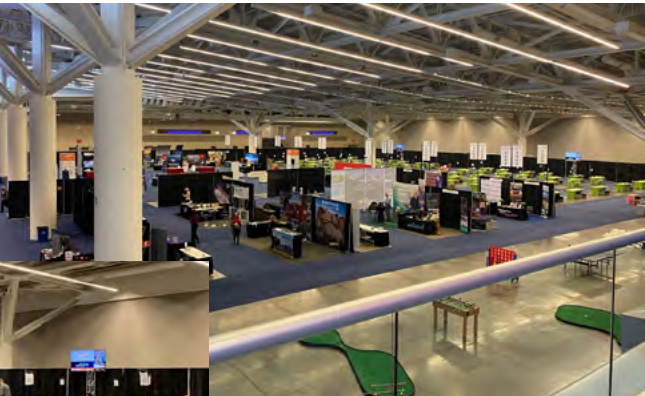
- **31** recipe submissions
- **41,302** social media engagements
- **6,481,041** impressions
- **5,470** referrals to **TravelSouthDakota.com**

*Results are inclusive of owned channel results (paid + organic)



NTA TRAVEL EXCHANGE

NTA Travel Exchange is a large motorcoach trade show designed to bring together domestic group tour operators and U.S. destinations. The department conducted 35 appointments with group tour operators, during which we provided information, inspiration and contact information to bring more tours to South Dakota. The department partnered with five South Dakota suppliers who also attended the show, which was held in Cleveland, OH.



DECEMBER

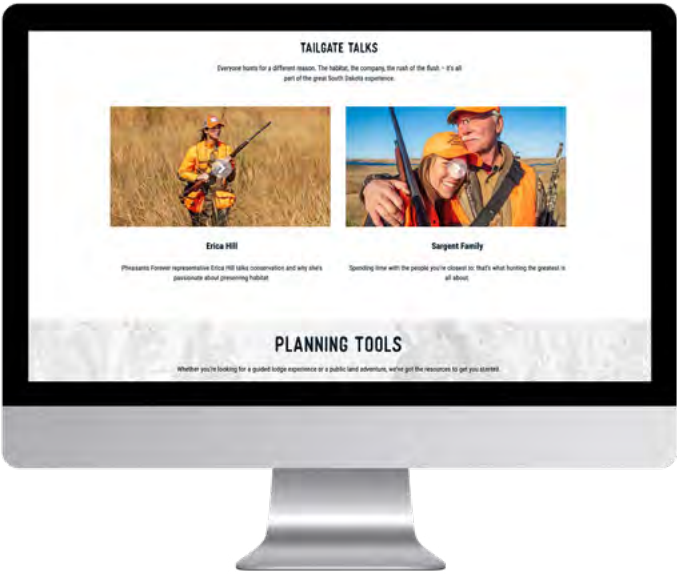
DYNAMIC PRINT PLACEMENT

In December, we capitalized on some late season print opportunities for premium placement in *Real Simple* and *Magnolia Journal*. We also appeared in the fall/winter issue of *Reveal Magazine* and *Midwest Living*, keeping our message at the forefront even before the traditional planning season begins.



HUNT THE GREATEST WEB CONTENT

After conducting focus groups with female hunters, the department revamped its hunting landing page, HuntTheGreatest.com, with content dedicated to sportswomen. They're the fastest-growing hunting audience, and the most underrepresented. This campaign worked to change that by giving a greater voice to women in the field.





DISTRICT 8 AMERICAN ADVERTISING AWARDS

Silver

- **Advertising & Promotion Campaign**
Travel Insights Email Campaign

SOUTH DAKOTA AMERICAN ADVERTISING AWARDS

Best of Class

- **Print Advertising**
South Dakota Tourism Magazine Campaign

Gold

- **Print Advertising > Magazine Advertising**
Magazine Campaign
- **Online/Interactive > Advertising & Promotion**
Travel Insights Email Campaign

Silver

- **Online/Interactive > Social Media**
Custer State Park Instant Experience
- **Sales & Marketing > Direct Marketing**
Suitcase Inspiration Mailer
- **Sales & Marketing > Direct Marketing**
Black Hills & Badlands Peak Extension Mailer
- **Film, Video, & Sound > Audio/Radio Advertising**
“Testimonial” Radio (Nat sounds)
- **Film, Video, & Sound > Online Film, Video, And Sound**
Winter Spot
- **Cross Platform > Integrated Campaigns**
Go Great Places Campaign

ADRIAN AWARDS

Gold

- **Recovery Marketing**
Great Places Are Waiting COVID-19 Campaign Strategy
- **Digital Campaign; Social Media Campaign**
ThanksGIFing Social Media Campaign

Bronze

- **Recovery Campaign Evolution**
Go Great Places Campaign
- **Advertising Campaign; Complete Campaign**
Black to Yellow Road Trip Campaign Co-op

TELLY AWARDS

Gold

- **Online Commercials: Travel/Tourism**
Great Places Are Waiting Online Commercial



U.S. TRAVEL ASSOCIATION FORECAST

Looking Ahead

U.S. TRAVEL FORECAST - VOLUME

				TRAVEL FORECAST				
	2019	2020		2021	2022	2023	2024	2025
Total # of trips	2.40 B	1.60 B		2.04 B	2.29 B	2.47 B	2.57 B	2.61 B
Domestic Person Trips	2.32 B	1.58 B		2.02 B	2.24 B	2.40 B	2.49 B	2.53 B
Leisure	1.84 B	1.40 B		1.77 B	1.86 B	1.95 B	2.01 B	2.04 B
Business	464 M	181 M		250 M	371 M	446 M	484 M	492 M
Auto	2.13 B	1.50 B		1.89 B	2.07 B	2.21 B	2.29 B	2.32 B
Air	189 M	79 M		131 M	166 M	189 M	206 M	214 M
International Arrivals	79 M	19 M		21 M	52 M	68 M	78 M	84 M
Canada	21 M	5 M		3 M	13 M	18 M	22 M	24 M
Mexico	18 M	7 M		9 M	17 M	18 M	19 M	19 M
Overseas	40 M	8 M		10 M	22 M	31 M	38 M	41 M

U.S. TRAVEL FORECAST - % CHANGE

				TRAVEL FORECAST				
	2019	2020		2021	2022	2023	2024	2025
Total # of trips	1.7%	-33.2%		27.5%	12.0%	7.8%	4.3%	1.7%
Domestic Person Trips	1.8%	-31.8%		27.8%	10.6%	7.3%	4.0%	1.5%
Leisure	1.9%	-24.5%		26.5%	5.3%	4.7%	2.9%	1.5%
Business	1.1%	-60.9%		37.6%	48.6%	20.4%	8.5%	1.5%
Auto	1.5%	-29.4%		25.7%	9.5%	6.7%	3.5%	1.3%
Air	4.3%	-58.4%		67.0%	26.4%	14.1%	8.9%	3.8%
International Arrivals	-0.4%	-75.5%		10.2%	144.4%	30.1%	14.8%	7.9%
Canada	-3.5%	-76.8%		-46.5%	423.8%	35.4%	19.9%	9.8%
Mexico	-0.3%	-61.6%		32.7%	80.7%	9.2%	0.8%	2.3%
Overseas	1.3%	-81.2%		25.2%	131.4%	42.9%	20.0%	9.6%



TRAVELSOUTHDAKOTA.COM // SDVISIT.COM



711 E. WELLS AVENUE, PIERRE, SD 57501-3369
PHONE: 605.773.3301 // FAX: 605.773.5977