



**Future Partners**

**Drive South Dakota Tourism  
with Data-Powered  
Strategies in 2025**





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We're a creative insights firm shaping strategies that  
capture hearts, minds, and *market share*.

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# **Preliminary Visitor Profile**



# Research Overview & Objectives

This dashboard presents interim findings of a comprehensive visitor profile development study conducted by Future Partners on behalf of Travel South Dakota. This preliminary dashboard presents the top line data collected using the Online Survey of South Dakota Visitors from visitors who traveled to, or within, the state in calendar year 2024.

The goal of the overall research was to:

- Develop extensive profiles of visitors to South Dakota
- Identify trip-specific data including visitor origin, purpose of stay, mode of transportation, accommodation while in-market, favorite activities visitors participated in and factors that induced travel to South Dakota
- Evaluate what visitors seek from the South Dakota visitor experience
- Assess the travel planning process, including resources used and planning times for planning windows
- Identify elements of the South Dakota visitor experience that are currently successful, as well as elements that can be added and improved.





# Methodology

To address the objectives of this research, Future Partners designed and fielded the Online Survey of South Dakota Visitors which was distributed to respondents using a trusted panel provider. This interim dashboard presents data from 800 completed surveys of South Dakota visitors gathered between September through November 2024.

Respondents met the following criteria:

- Age 18 years or older
- Must have taken a trip to South Dakota between January 2024 and October 2024.

All data collected was weighted to be representative of the overall population of South Dakota visitors, specifically secondary resources were used to validate the proportion for trip type (i.e., day trip, overnight), accommodation type (e.g., hotel/motel, RV, etc.), age, and origin market.





A photograph of the Mount Rushmore National Memorial in the United States. The image shows the four large granite faces of Presidents George Washington, John Adams, Thomas Jefferson, and Abraham Lincoln carved into the mountain. The sky is blue with scattered white clouds, and the lighting suggests it might be late afternoon or early morning, with some clouds catching the low sun.

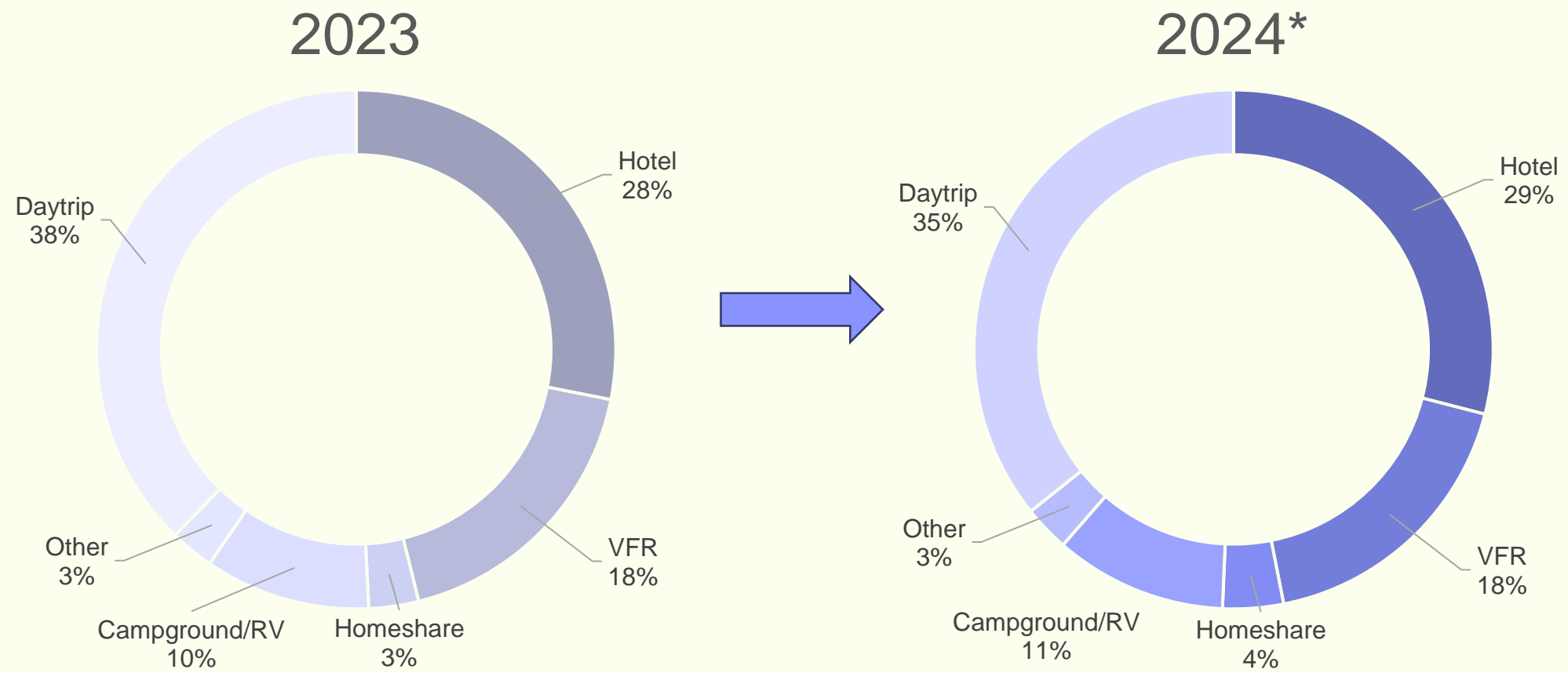
**Future Partners**

# **Preliminary Tourism Impact**



# South Dakota Tourism Impact – Preliminary Estimates

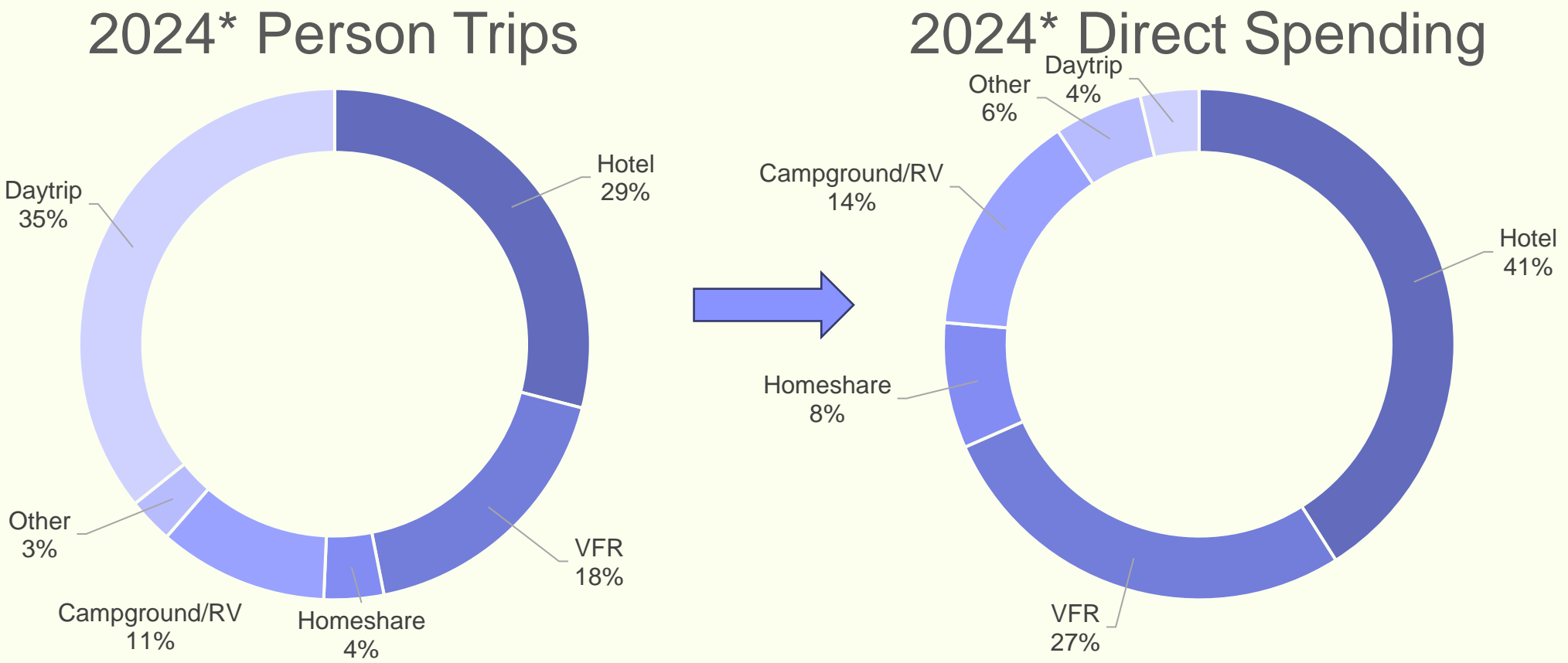
Total Person Trips



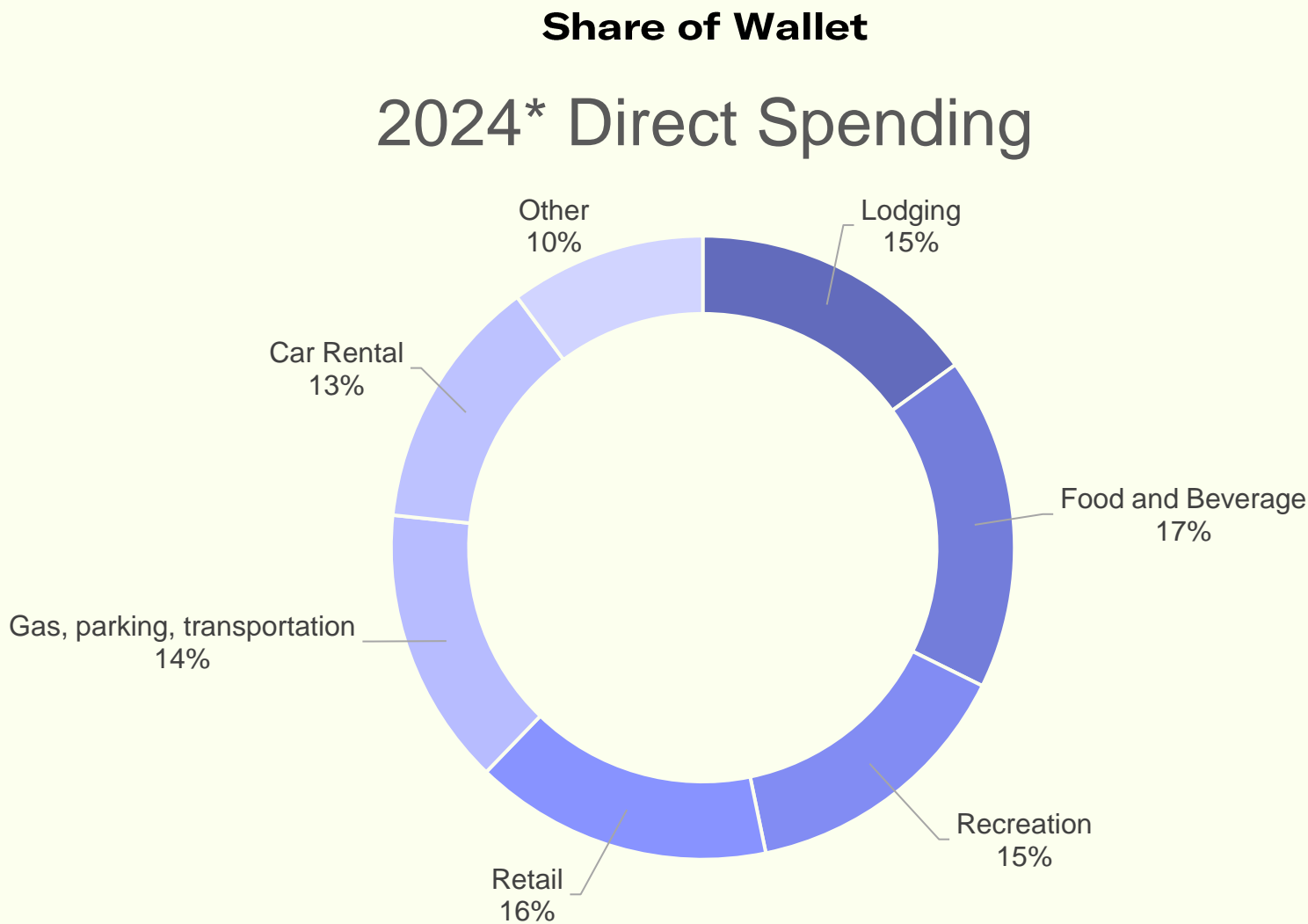


# South Dakota Tourism Impact – Preliminary Estimates

## Volume to Spending Comparison



# South Dakota Tourism Impact – Preliminary Estimates





# Destination Snapshot

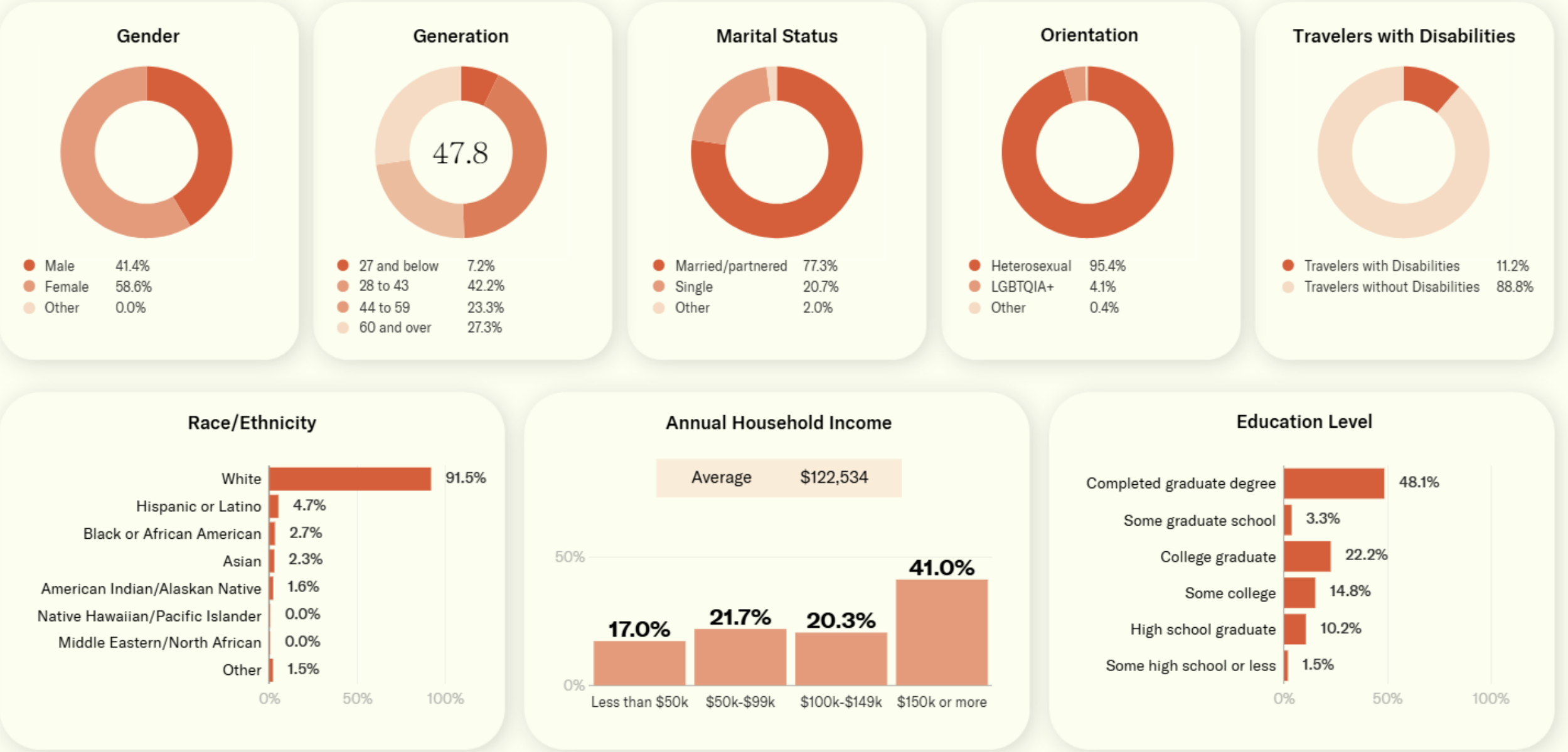


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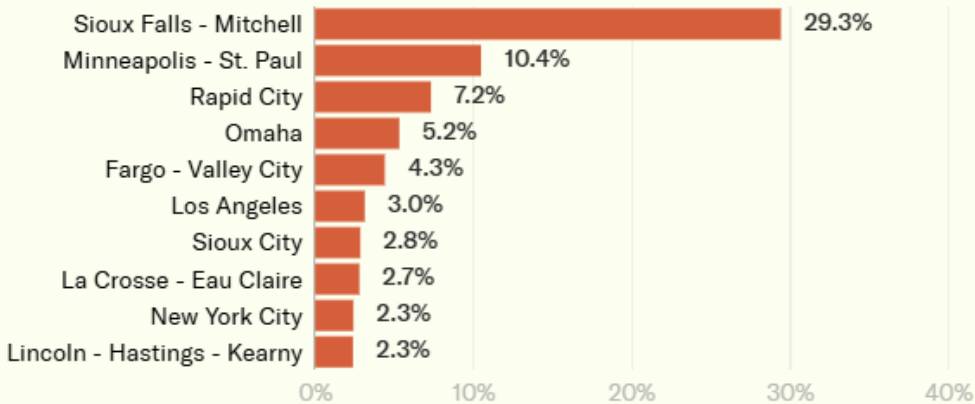
# Demographics



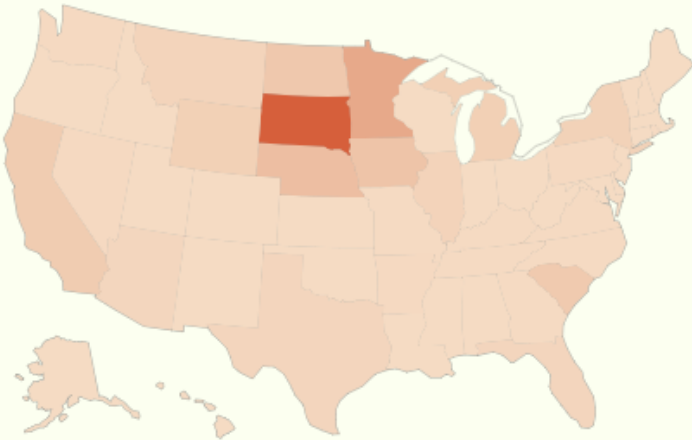


# Origin Markets

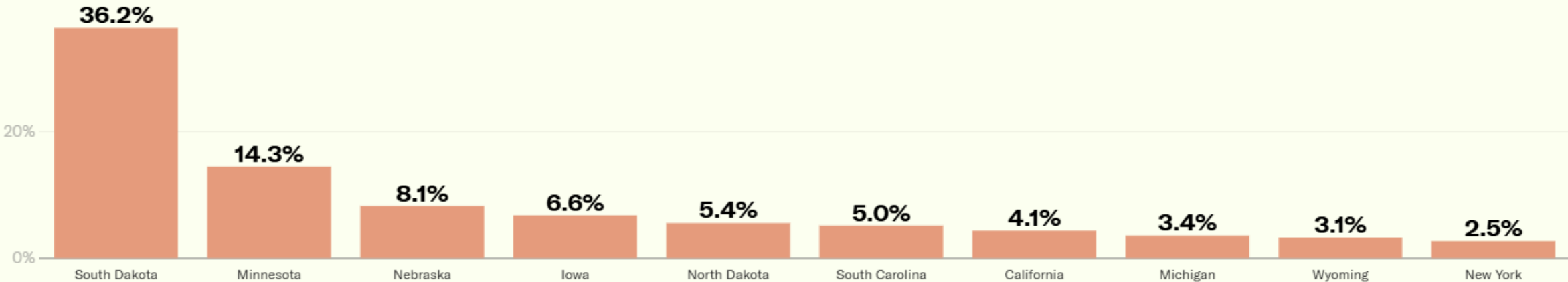
Top Origin Metros



Domestic Origin Map



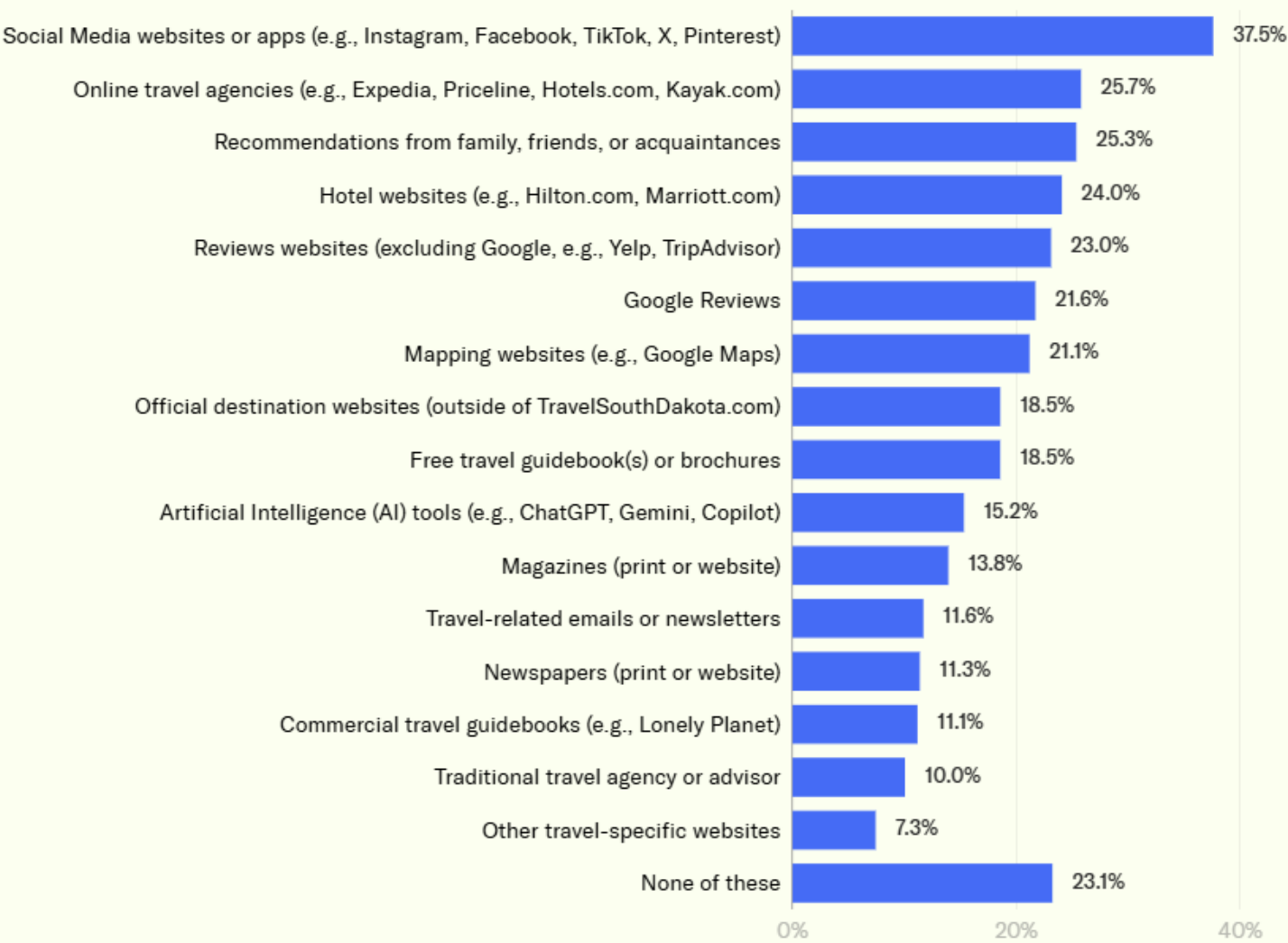
Top Origin States





# Travel Behaviors

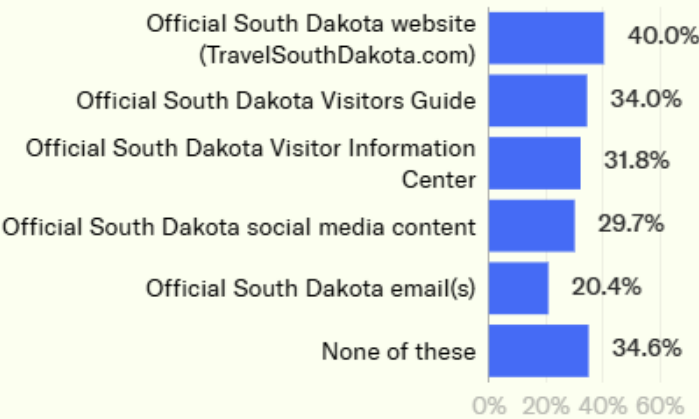
Travel Resources Used for Planning South Dakota Trip



% Visited Each State in 2024

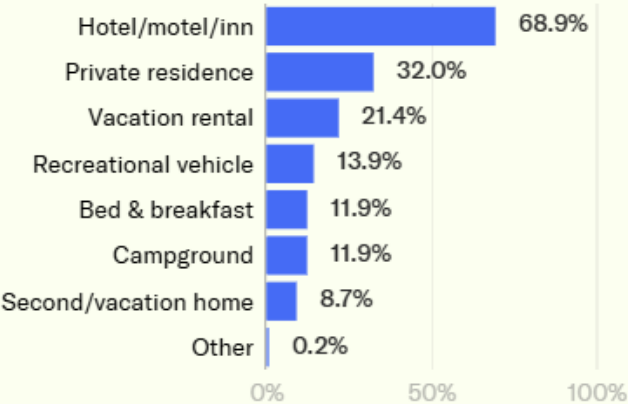
South Dakota	100.0%
Minnesota	51.2%
North Dakota	43.2%
Colorado	41.3%
Iowa	38.9%
Nebraska	36.8%
Illinois	33.9%
Wisconsin	31.9%
Montana	31.3%
Wyoming	29.9%
Missouri	28.0%

DMO Resources Used for Planning Trip



# Trip Details

Lodging Type



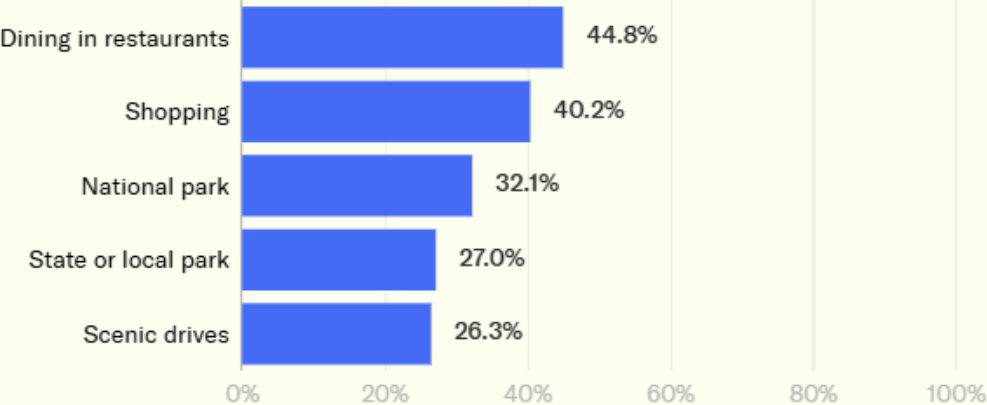
Length of Stay



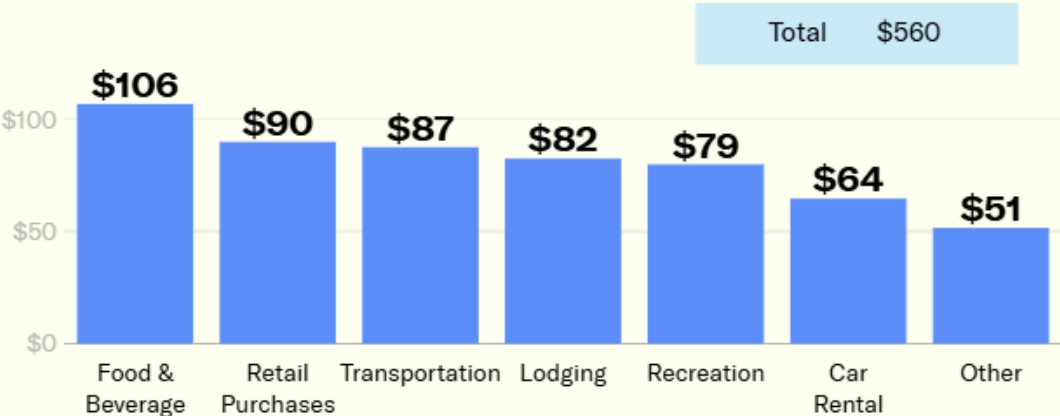
Arrival Transportation Method

Personal automobile	56.2%
Airline	45.4%
Taxi/Uber/Lyft or other ride-sharing service	19.0%
Recreational vehicle (RV) or motorhome	12.9%
Bus line	11.4%
Rental car	10.4%
Motorcycle	5.5%
Bicycle	3.3%
None of the above	0.2%

Top In-Destination Activities



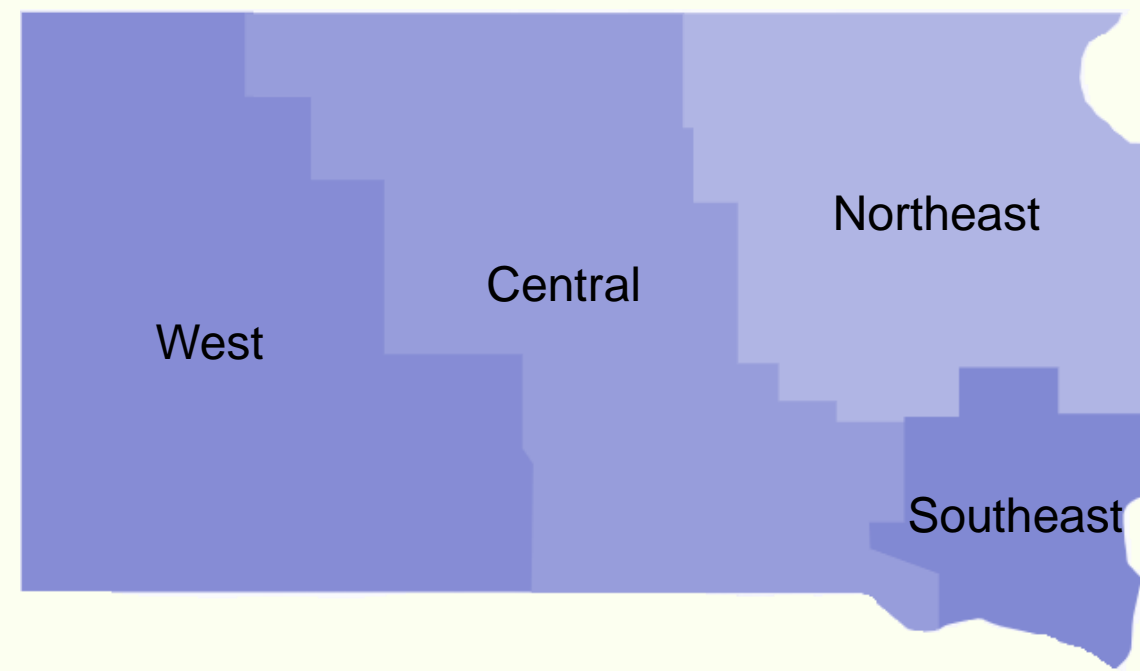
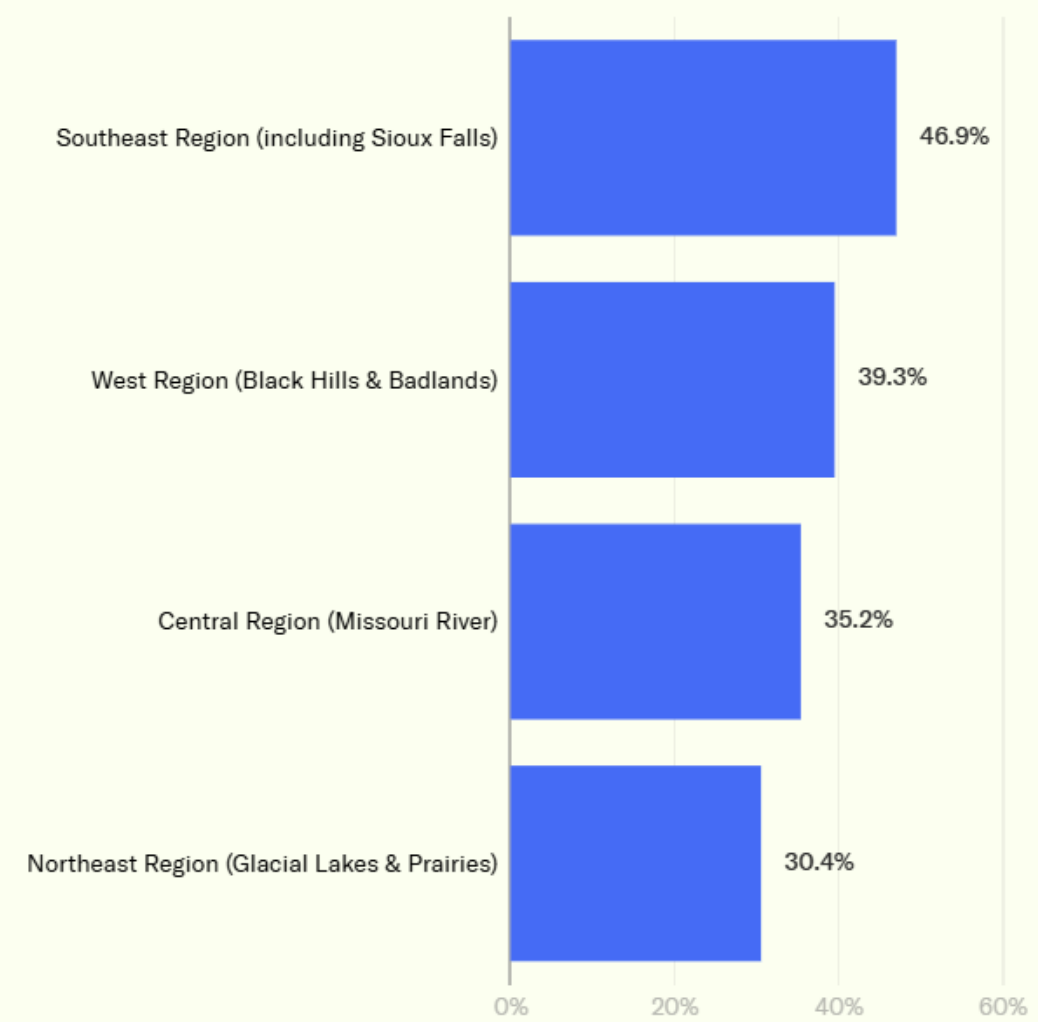
Daily Spend per Travel Party





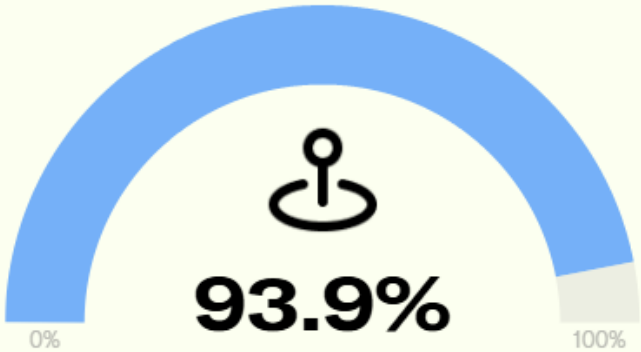
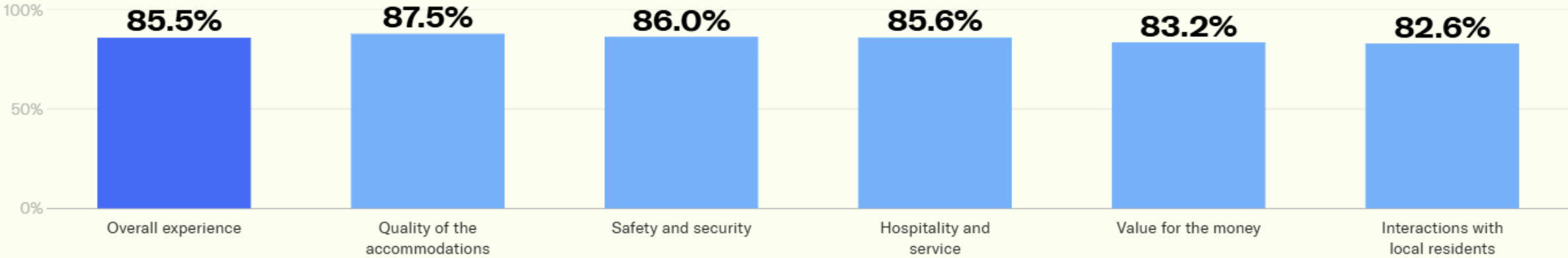
# Regions

Regions Visited

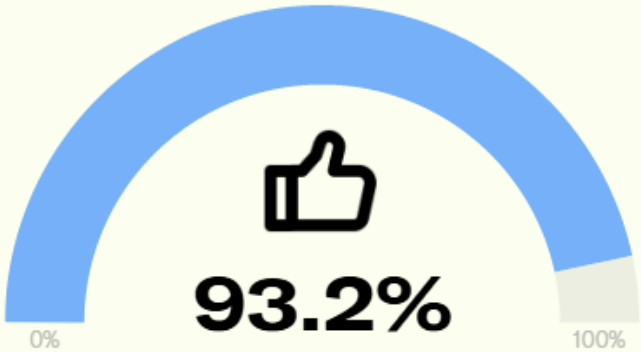


# Trip Experience

**Trip Satisfaction**  
(Top 2 Box - % Selected "4" or "5 - Extremely Satisfied")



**Likelihood to Return  
to South Dakota**  
(Top 2 Box - % Selected "Likely" or "Very Likely")



**Likelihood to Recommend  
South Dakota as a Place to Visit**  
(Top 2 Box - % Selected "Likely" or "Very Likely")





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# **Highest-Value Traveler Personas**



# Research Objectives

## Phase I: Highest-Value Traveler Personas Identification

The purpose of this first phase was to identify the traveler segments that:

- Are most efficient to convert to South Dakota visitors and
- Represent the most potential and highest positive impact.

## Phase II: Highest-Value Personas' Destination Perceptions

- Travel motivations and decision-making behaviors, travel planning
- Competitive analysis Past visitation to and interest in future visitation
- Brand perceptions of South Dakota as a leisure travel destination
- Desired activities, trip behaviors and experiences
- Reactions to brand positioning statements

Ultimately, this research aims to increase visitation and thus the economic impact of tourism by equipping Travel South Dakota to more effectively convert prospective visitors into actual visitors.





# Methodology Overview

- **Phase I: Highest-Value Traveler Persona Identification**

- U.S.-based adults, age 18+, who have taken at least one overnight leisure trip in the past year
- 2,000 respondents
- 20 personas tested (selected out of a 60+ persona framework)

- **Phase II: Destination Perceptions Survey**

- 2,000 responses were collected
- Must belong to one of five studied personas:
  - American History Lovers (557 respondents)
  - Contrarians (462 respondents)
  - Parks Explorers (977 respondents)
  - Scenic Beauty Appreciators (1,082 respondents)
  - The Wild Bunch (400 respondents)

**Highest-Value Traveler Persona  
Identification Survey**  
Online Survey of U.S. Travelers



**Traveler Persona Value Index**  
Future Partners' Model for Identifying  
Highest-Value Personas



**Destination Perceptions Among High-  
Value Traveler Personas Survey**  
Online Survey Targeting Highest-Value  
Personas

Phase I

Phase II

# Methodology: Model for Identifying Highest-Value Personas

Primary Factor – 10-point scale

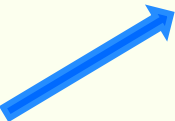
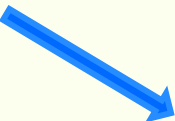
Excitement for Planning a Trip  
to South Dakota  
in the next 2 years

Primary Factor – 10-point scale

Personal Fit  
with South Dakota

Secondary Factor – Binary 1-0 for Y/N

Likelihood of Visiting South  
Dakota  
in the next 12 months (Y/N)



South Dakota-  
Aligned Index



Max Leisure Travel  
Spend \$  
for the next 12 months  
(indexed)



Traveler  
Persona Value  
Index



# Contrarians



# American History Lovers



# The Wild Bunch



# Scenic Beauty Appreciators



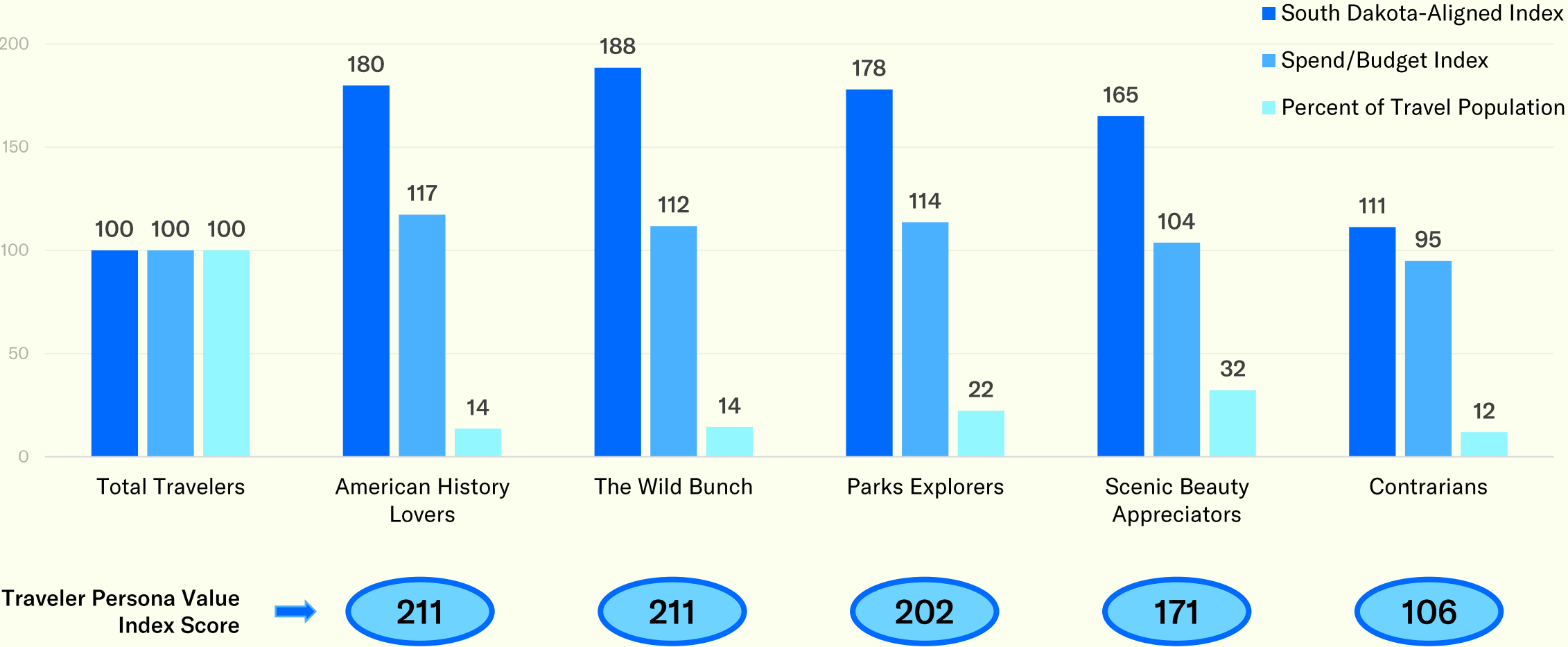
# Parks Explorers



# Highest-Value Traveler Personas

Component Index Values Used in the Traveler Persona Value Index Model and Population Sizes

*Sequenced in Order of Traveler Persona Value Score*





# American History Lovers

Travelers who seek out destinations of past and current American political and cultural significance.



# Persona Definition: **American History Lovers**



## Description

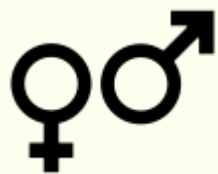
Travelers who seek out destinations of past and current American political and cultural significance.

## Research/Operational Definition

- Selected “Interested” or “Very interested” in response to the question, “*How interested are you in experiences related to the arts, culture, Indigenous peoples, and history in the places that you visit (e.g., museums, theater, performing arts, public art, etc.)?*”
- Selected “10 – This is absolutely me” indicating how much the following statement described them: “*I prefer to travel to U.S. destinations that are historically interesting.*”
- Has done 2 out of the following 3 cultural activities while on a leisure trip in the past 12 months:
  - *Visited a historical landmark*
  - *Took a history tour*
  - *Visited a historical site*

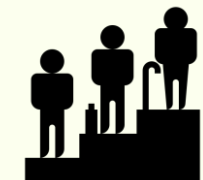
# American History Lovers: Who Are They?

## Gender



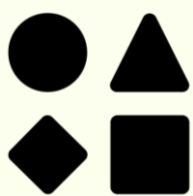
Woman	54.8%
Man	44.9%

## Average Age



Average Age	56.5 years
Boomers+	54.2%
Gen X	21.0%
Millennials	19.0%
Gen Z	5.7%

## Race / Ethnicity



White (Only)	81.5%
BIPOC	18.5%
Asian	3.4%
Black/African American	7.4%
Hispanic/Latino/a/e	5.2%
Other BIPOC	4.7%

Note: BIPOC stands for Black, Indigenous, and People of Color. Respondents were able to select more than one race, so percentages do not add up to 100.

## Marital Status



Married/partnered	63.7%
Single/Unpartnered	36.3%

## Annual Household Income



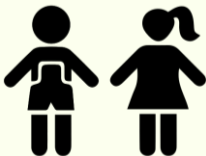
\$87,976  
\$100K+: 32.8%

## Travel Budget



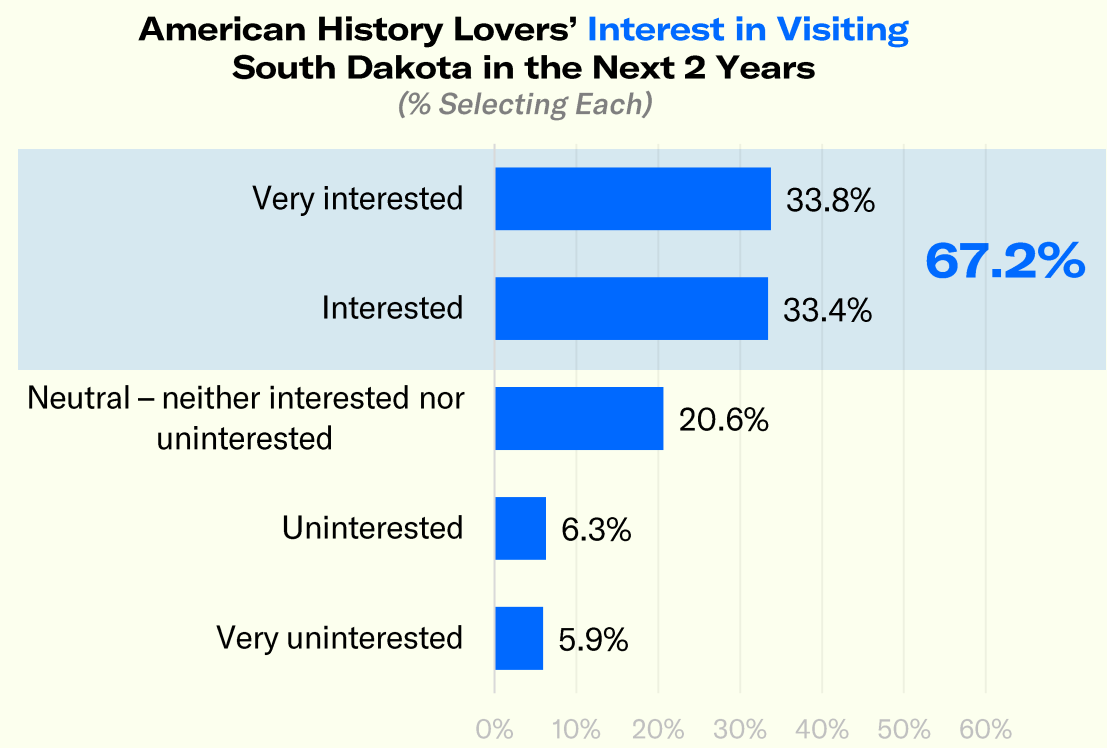
\$4,804

## Minor Children in Household

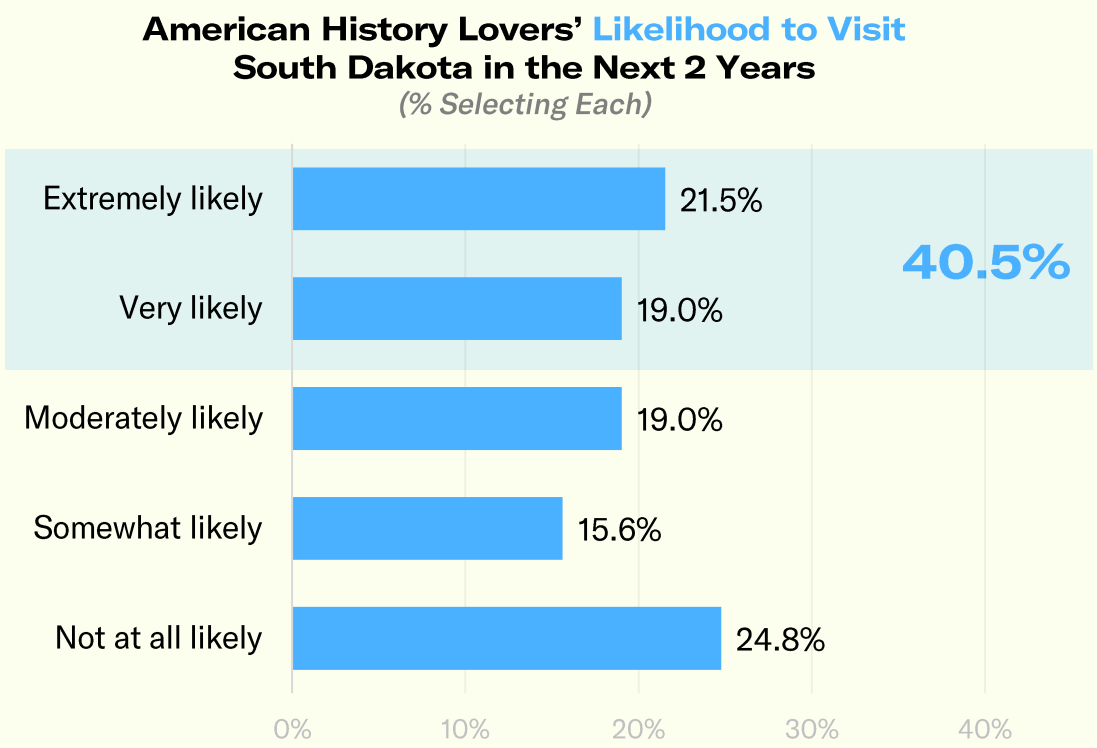


26.0%

# There is a gap between American History Lovers’ interest in visiting South Dakota in the next two years and their intent to do so, signaling an opportunity to convert intrigue into action.



**Question:** How interested are you in visiting the following states for an overnight leisure trip in the next 2 years? – South Dakota.  
Base: American History Lovers. 557 completed surveys.

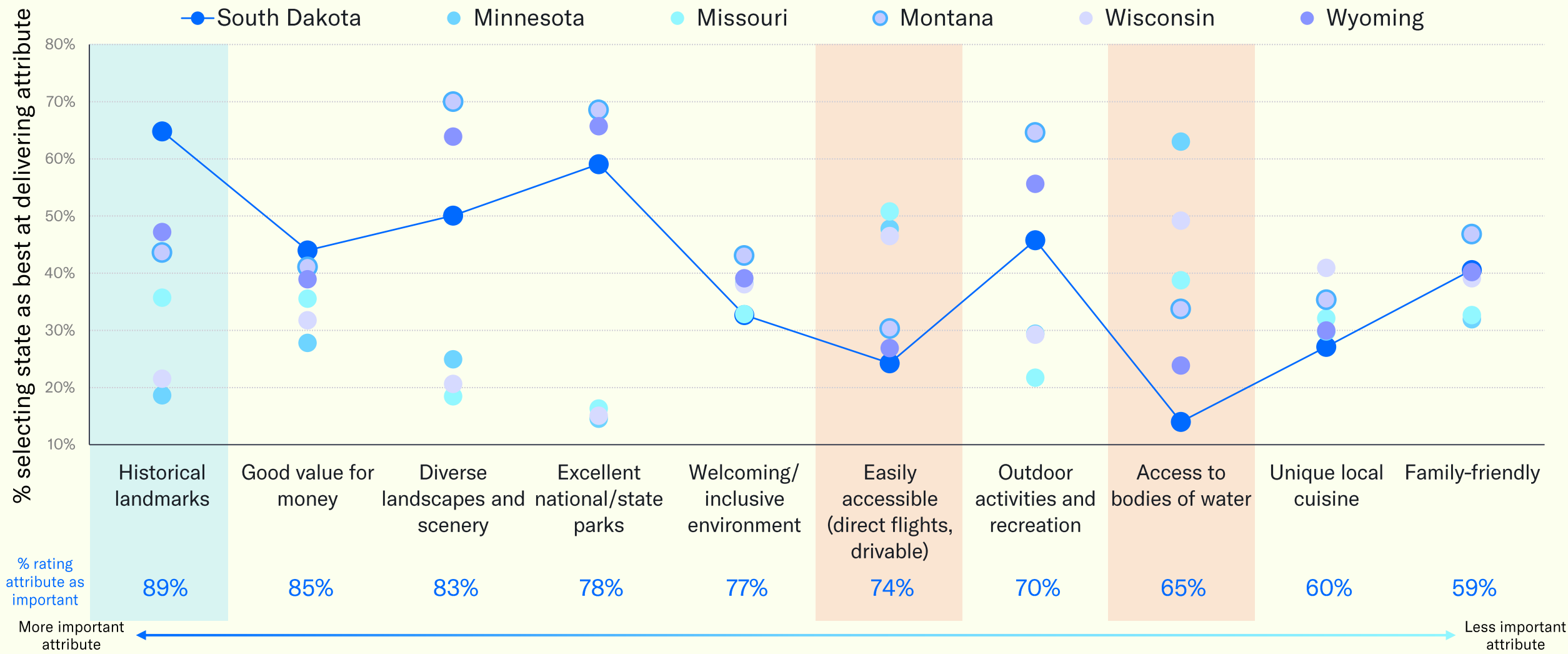


**Question:** How likely are you to visit South Dakota for an overnight leisure trip... –  
...in the next 2 years?  
Base: American History Lovers. 557 completed surveys.



# American History Lovers believe South Dakota tops competitors in delivering on their highest priority: historical landmarks.

Competitive Standing on **American History Lovers'** Most Important Destination Attributes

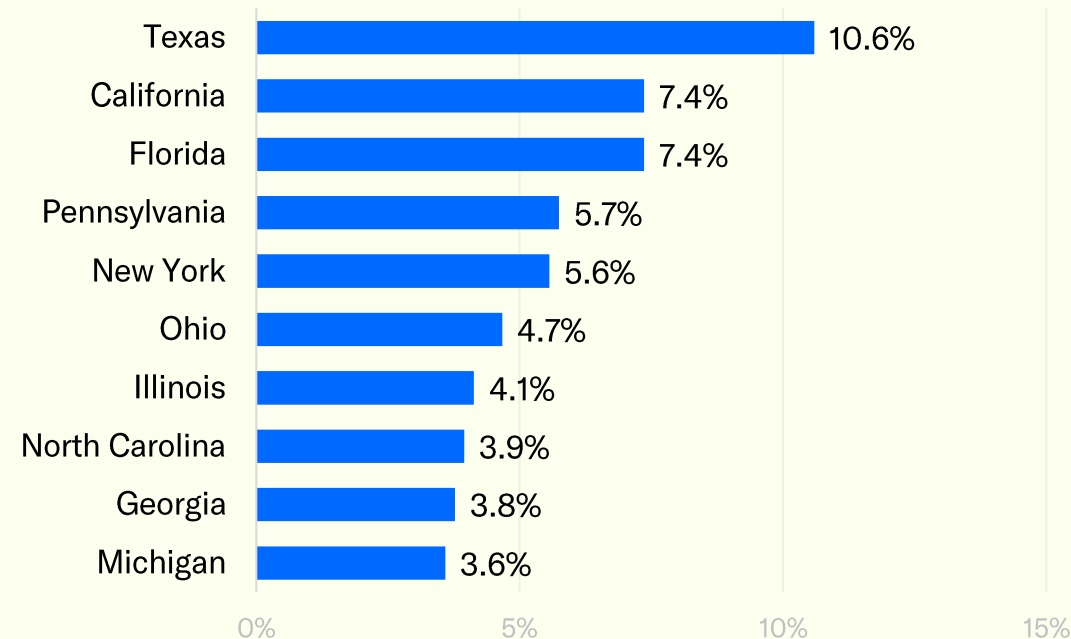


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Question: In your opinion, which state or states are best at delivering each attribute? Please respond based on your current perception, whether you have been there before or not. Select up to three states per attribute. Dot placement indicates % selecting destination for attribute.

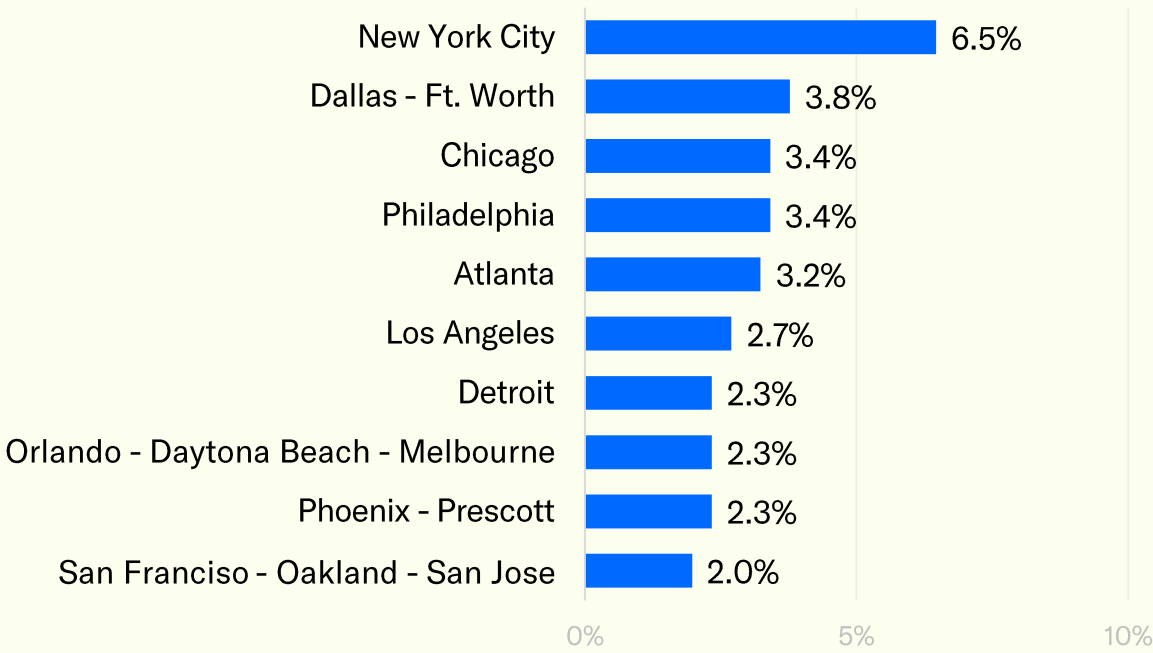
# Origin Markets of American History Lovers

**Top 10 Origin States  
for American History Lovers**



**Question:** In which state do you currently reside?  
Base: American History Lovers. 557 completed surveys.

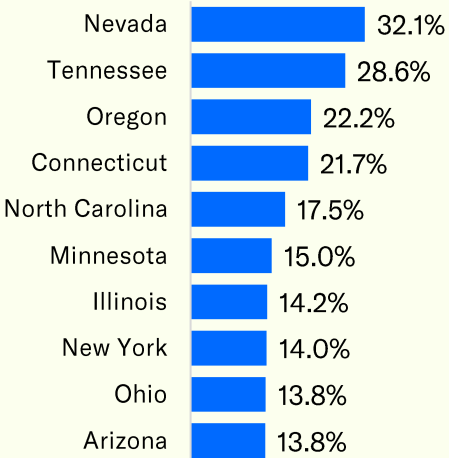
**Top 10 Origin DMAs  
for American History Lovers**



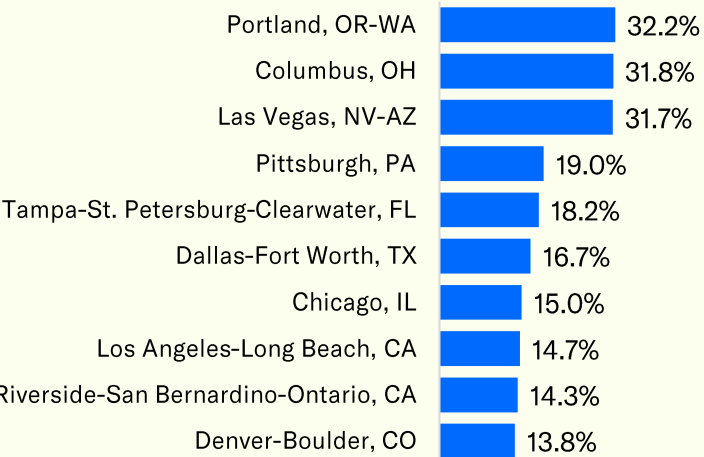
**Question:** What is your home zip code (5 digits)?  
Base: American History Lovers. 557 completed surveys.

# Persona Prevalence\* Profile of American History Lovers

Highest-Prevalence States

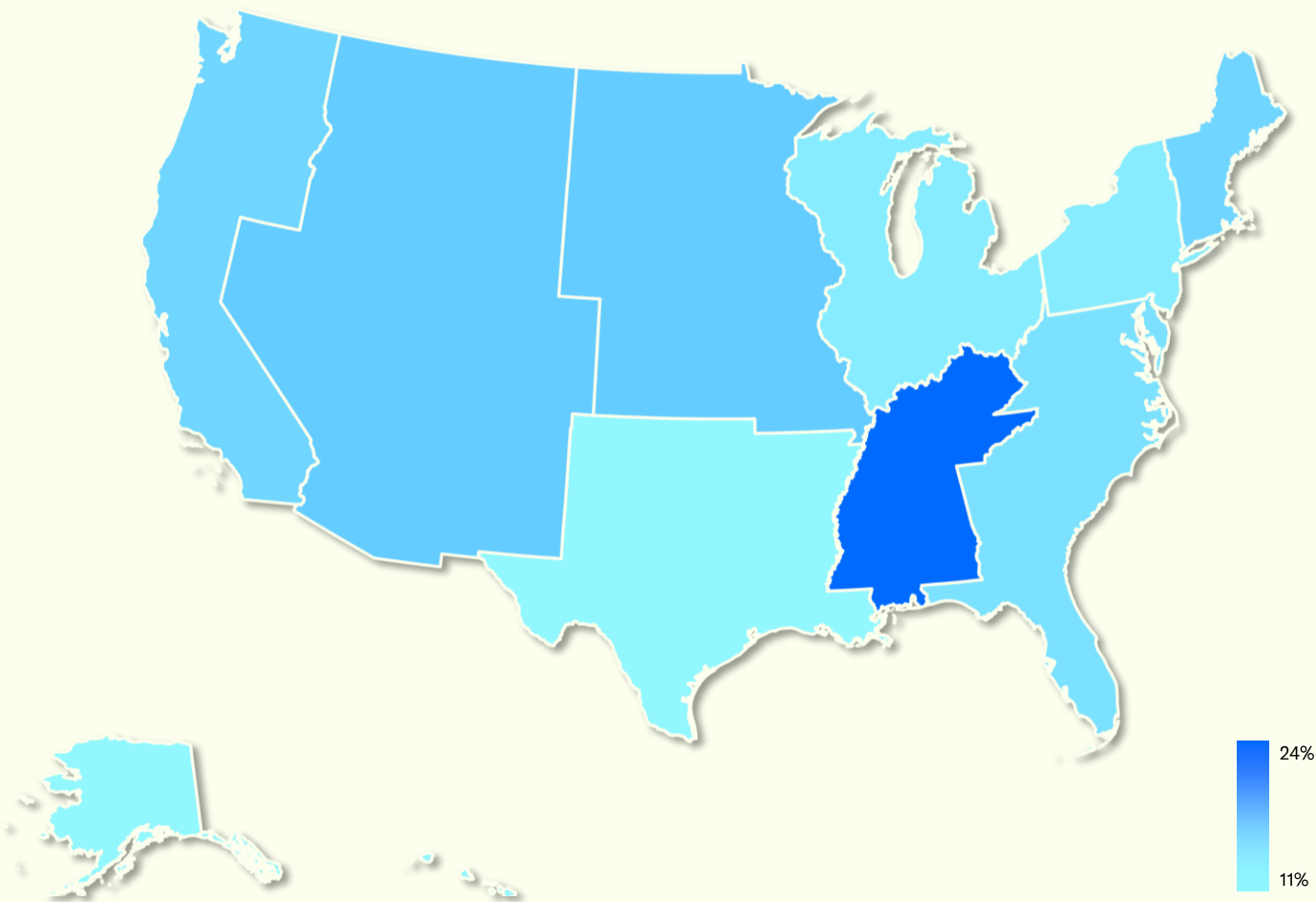


Highest-Prevalence DMAs



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Map of Persona Prevalence (U.S. Divisions)

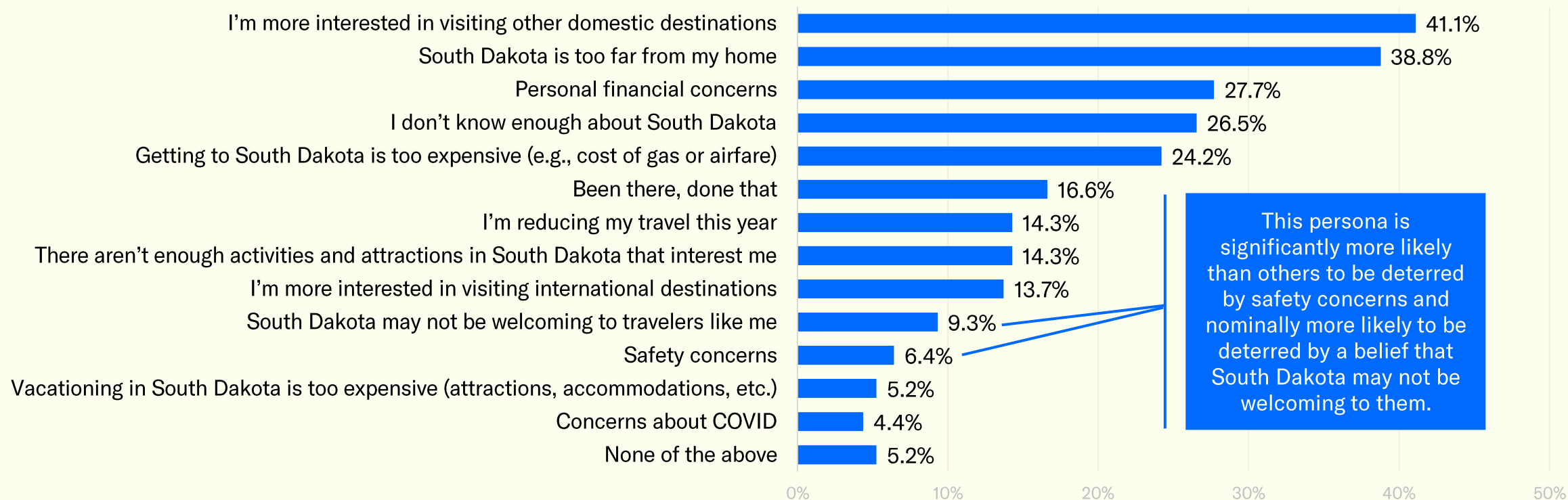


\*Persona Prevalence refers to the proportion of a population that can be categorized as a particular persona. For example, 32.1% of U.S. travelers in Nevada from our Phase I study qualified as American History Lovers.



# A preference for other domestic destinations and geographic distance are keeping American History Lovers from visiting.

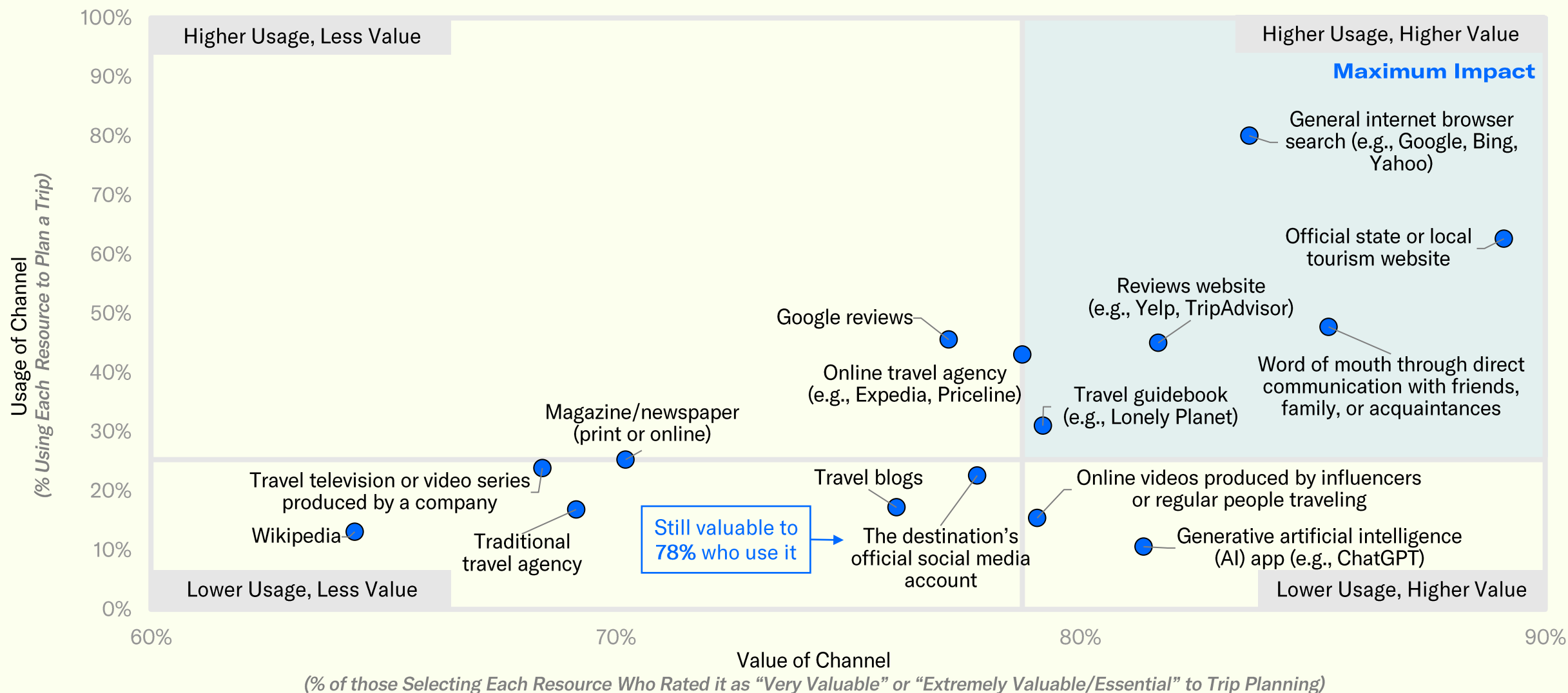
**Deterrents to Visiting South Dakota Among American History Lovers**  
 (% of American History Lovers Selecting Each as Keeping Them From Visiting South Dakota)



**Question:** Which of these (if any) are keeping you from visiting South Dakota?

**Base:** American History Lovers who are “not at all,” “somewhat,” or “moderately” likely to visit South Dakota in the next 2 years or in the future ever. 343 completed surveys.

# Official state/local tourism websites are both widely used and highly valued for trip planning among American History Lovers.



# Contrarians

Travelers who want to go where others don't.  
Getting away from people and the rat race  
drives their destination selection.



# Persona Definition: **Contrarians**



## Description

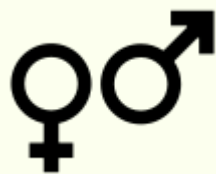
Travelers who want to go where others don't. Getting away from people and the rat race drives their destination selection.

## Research/Operational Definition

- “Generally agreed” or “Strongly agreed” with the statement, “*I tend to prefer travel destinations that are not necessarily popular with other people.*”
- “Slightly disagreed,” “Generally disagreed,” or “Strongly disagreed” with the statement, “*I like visiting places that have a lot of ‘buzz’ (people are talking/posting about it and want to visit).*”
- Selected “Appealing” or “Very appealing” in response to the question, “*How appealing is the idea of traveling ‘off the beaten path’ to you?*”

# Contrarians: Who Are They?

## Gender



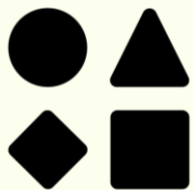
Woman	56.1%
Man	43.9%

## Average Age



Average Age	59.3 years
Boomers+	62.3%
Gen X	22.3%
Millennials	11.5%
Gen Z	3.9%

## Race / Ethnicity



White (Only)	90.0%
BIPOC	10.0%
Asian	2.2%
Black/African American	1.9%
Hispanic/Latino/a/e	3.5%
Other BIPOC	3.0%

Note: BIPOC stands for Black, Indigenous, and People of Color. Respondents were able to select more than one race, so percentages do not add up to 100.

## Marital Status



Married/partnered	59.3%
Single/Unpartnered	40.7%

## Annual Household Income



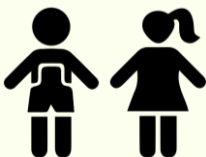
\$80,022  
\$100K+: 27.9%

## Travel Budget



\$3,853

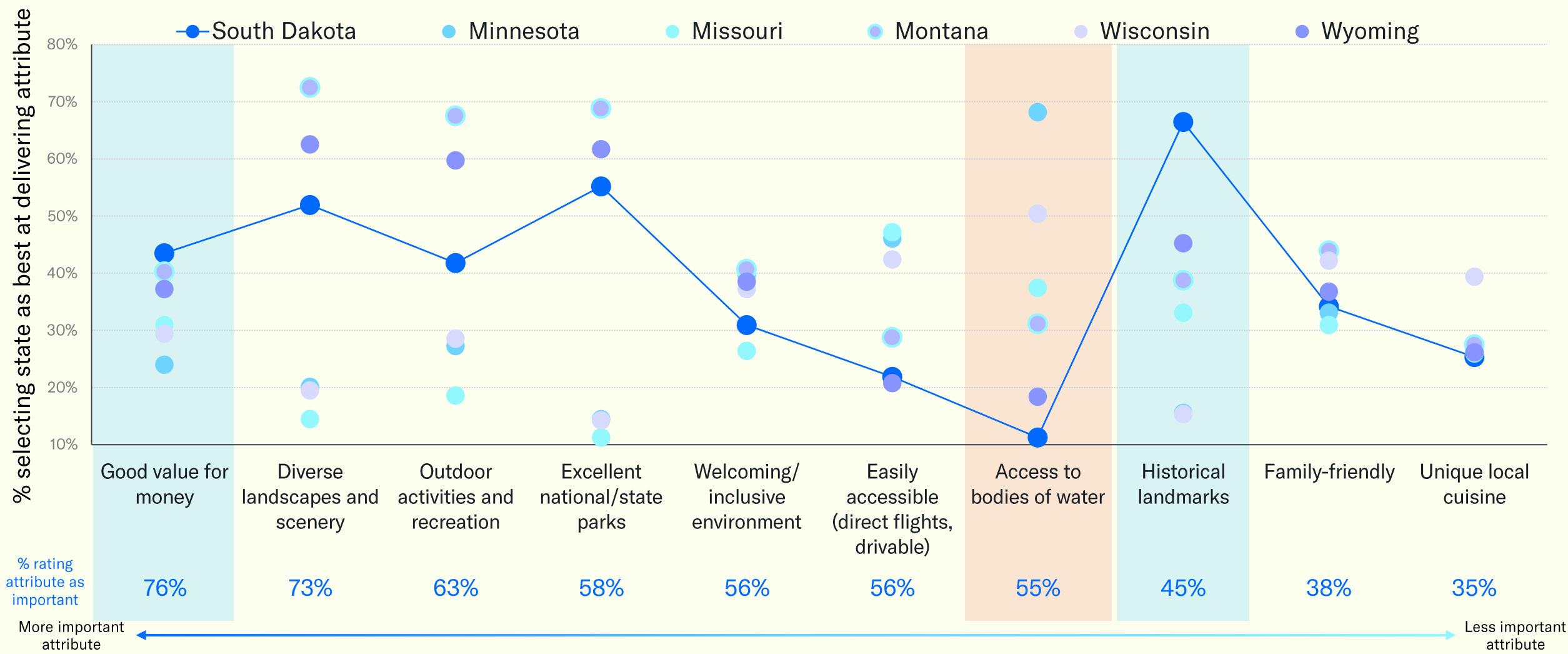
## Minor Children in Household



13.9%

# For Contrarians, South Dakota surpasses competitors in terms of historical landmarks and offers relatively good value for money.

Competitive Standing on **Contrarians'** Most Important Destination Attributes



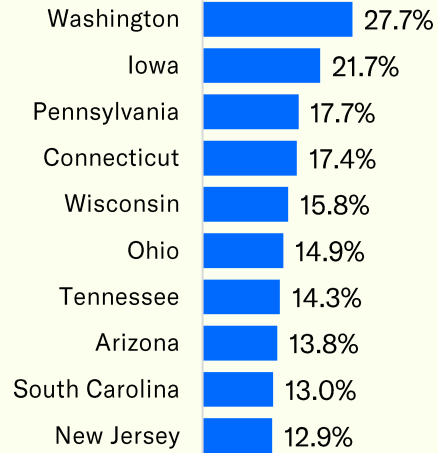
Future Partners

Question: In your opinion, which state or states are best at delivering each attribute? Please respond based on your current perception, whether you have been there before or not. Select up to three states per attribute. Dot placement indicates % selecting destination for attribute.

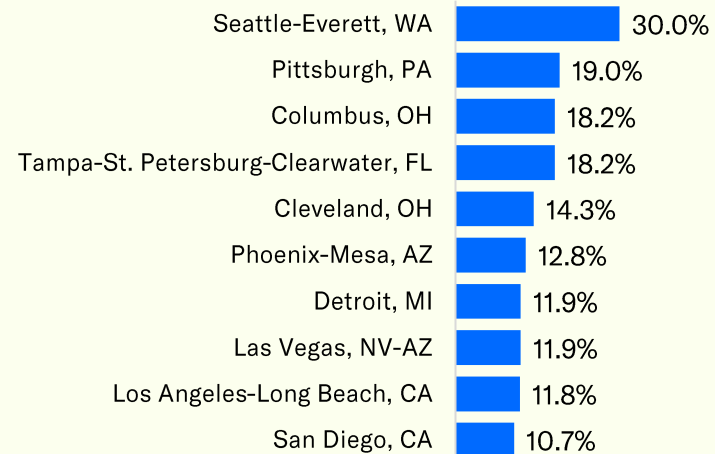


# Persona Prevalence\* Profile of Contrarians

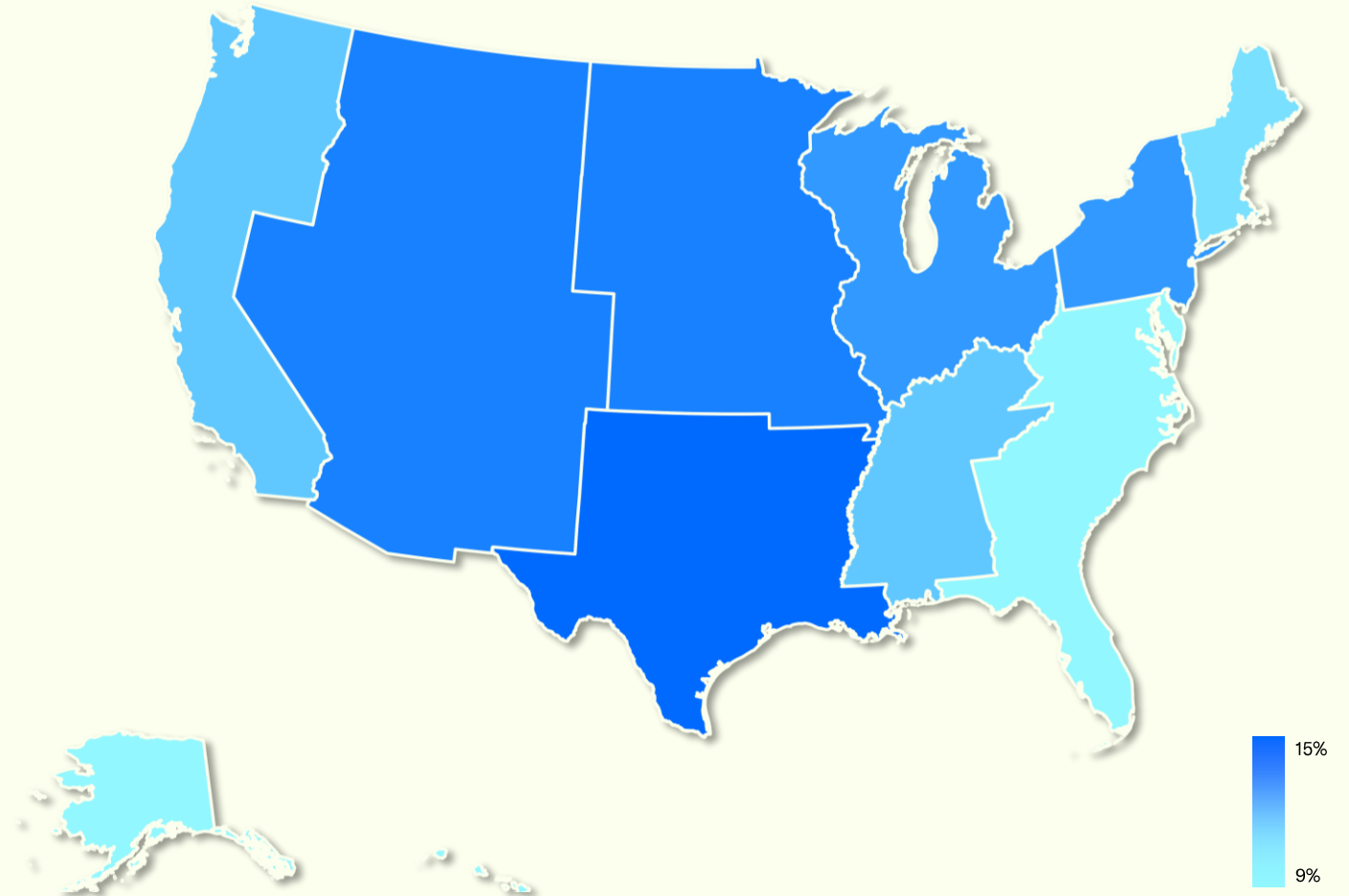
## Highest-Prevalence States



## Highest-Prevalence DMAs



## Map of Persona Prevalence (U.S. Divisions)



\*Persona Prevalence refers to the proportion of a population that can be categorized as a particular persona. For example, 27.7% of U.S. travelers in Washington from our Phase I study qualified as Contrarians.

# Prioritizing other domestic destinations over South Dakota and geographic distance are Contrarians' top visitation deterrents.

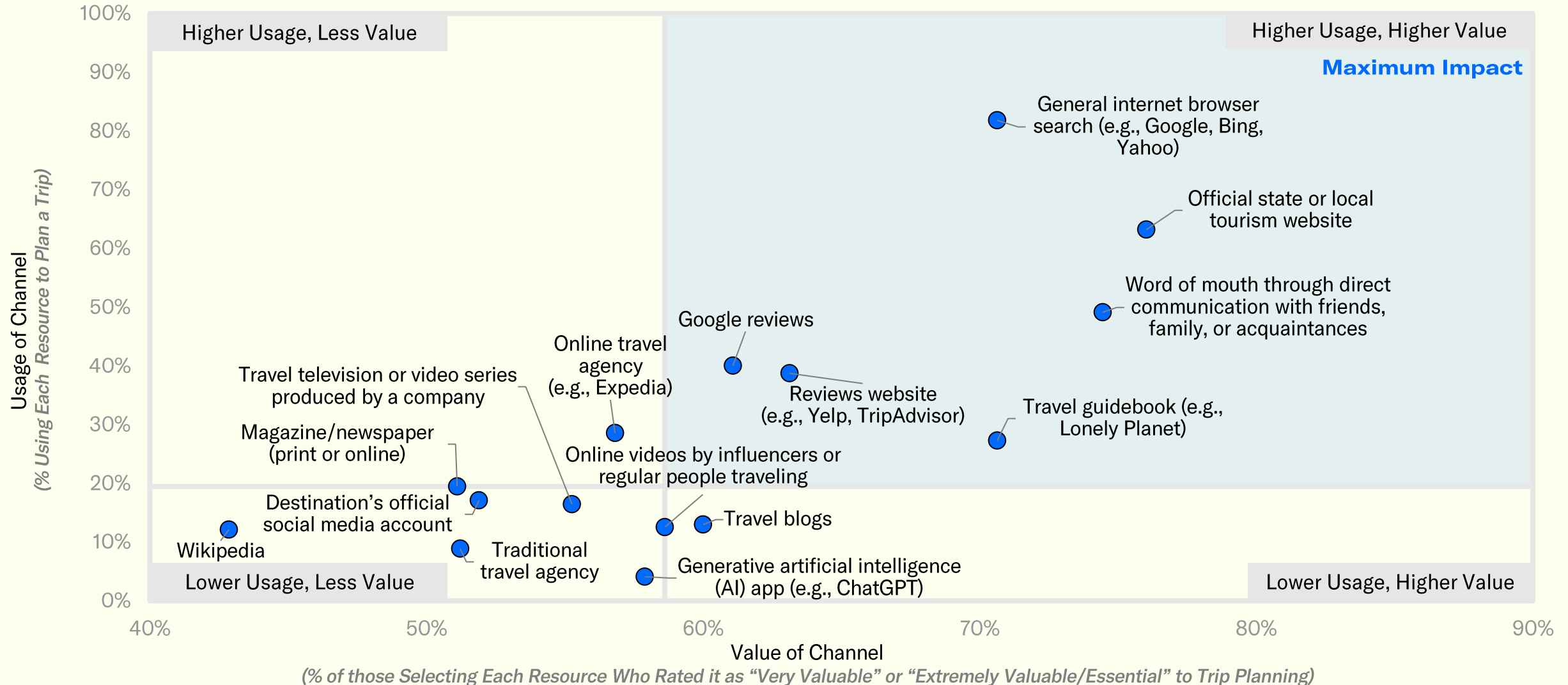
**Deterrents to Visiting South Dakota Among Contrarians**  
(% of Contrarians Selecting Each as Keeping Them From Visiting South Dakota)



Question: Which of these (if any) are keeping you from visiting South Dakota?

Base: Contrarians who are “not at all,” “somewhat,” or “moderately” likely to visit South Dakota in the next 2 years or in the future ever. 367 completed surveys.

# Like American History Lovers, Contrarians widely use & highly value official state/local tourism websites for travel planning.





# Parks Explorers

A man with dark hair, wearing a dark blue t-shirt, grey shorts, white socks, and red sneakers, is sitting on a rocky ledge. He is looking out over a vast, rugged landscape of layered rock formations, likely a national park. The sun is setting in the distance, creating a dramatic sky with orange, yellow, and blue hues. The landscape is filled with sharp, jagged rock peaks and deep valleys.

Parks create an easy, curated way to connect with the nation's most unusual landscapes. These travelers enjoy & seek out such experiences.



# Persona Definition: Parks Explorers



## Description

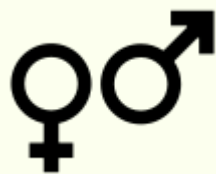
Parks create an easy, curated way to connect with the nation's most unusual landscapes. These travelers enjoy & seek out such experiences.

## Research/Operational Definition

- “Generally agreed” or “Strongly agreed” with the following statements:
  - “*Connecting with nature/the great outdoors is very important to me.*”
  - “*I enjoy destinations that allow me to comfortably enjoy nature.*”
- Has traveled in the past 12 months specifically to do at least one of the following:
  - *Wildlife viewing*
  - *Ecotourism*
  - *Hiking/backpacking*
- Has visited 2 or more state or national parks in the past two years

# Parks Explorers: Who Are They?

## Gender



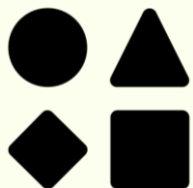
Woman	54.8%
Man	45.0%

## Average Age



Average Age	50.8 years
Boomers+	38.2%
Gen X	26.1%
Millennials	25.4%
Gen Z	10.3%

## Race / Ethnicity



White (Only)	80.1%
BIPOC	19.9%
Asian	3.2%
Black/African American	8.1%
Hispanic/Latino/a/e	6.7%
Other BIPOC	3.5%

Note: BIPOC stands for Black, Indigenous, and People of Color. Respondents were able to select more than one race, so percentages do not add up to 100.

## Marital Status



Married/partnered	61.1%
Single/Unpartnered	38.9%

## Annual Household Income



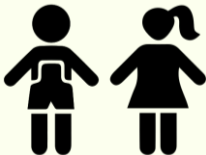
\$88,384  
\$100K+: 33.6%

## Travel Budget



\$4,929

## Minor Children in Household

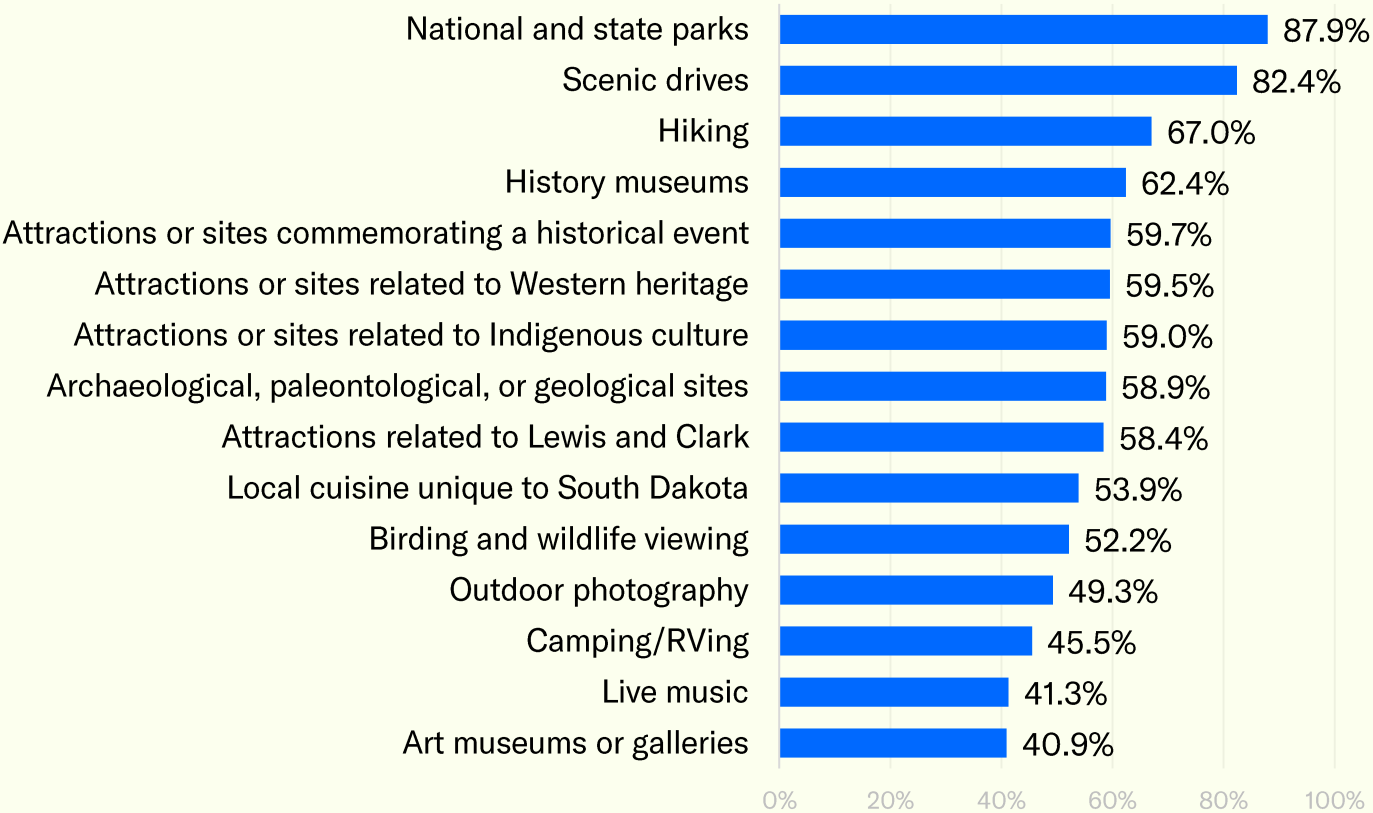


31.3%



# Hiking ranks as Parks Explorers’ third most preferred activity for a South Dakota visit; they prioritize it much more than other personas do.

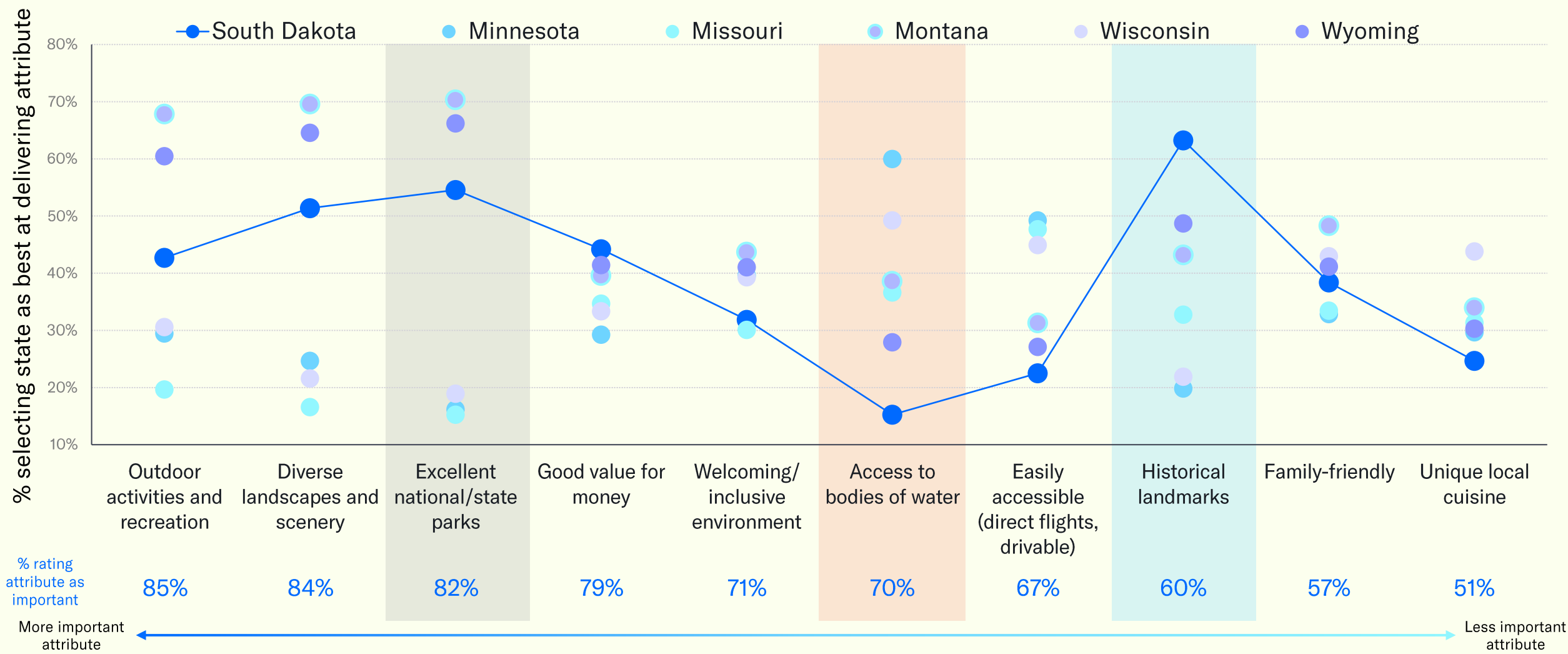
**Parks Explorers’ Top 15 Most Exciting Activities for South Dakota Visit**  
*(% of Parks Explorers Selecting Each Activity)*



Question: Which of the following types of attractions or activities would you be most excited to engage in if you were to visit South Dakota? (Select all that apply.) Base: Parks Explorers who are at least “somewhat likely” to visit South Dakota in the future/next 2 years. 870 completed surveys.

# Parks Explorers rank South Dakota as best in historical landmarks but prefer Montana and Wyoming for their top priorities.

Competitive Standing on Parks Explorers' Most Important Destination Attributes

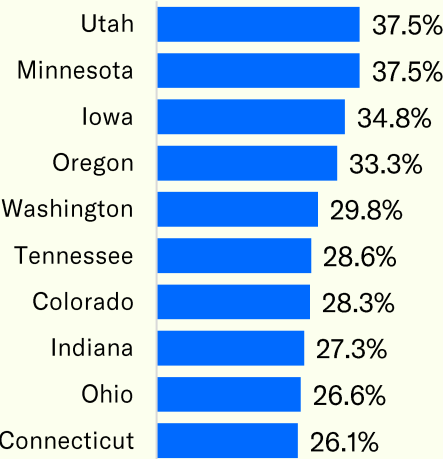


Future Partners

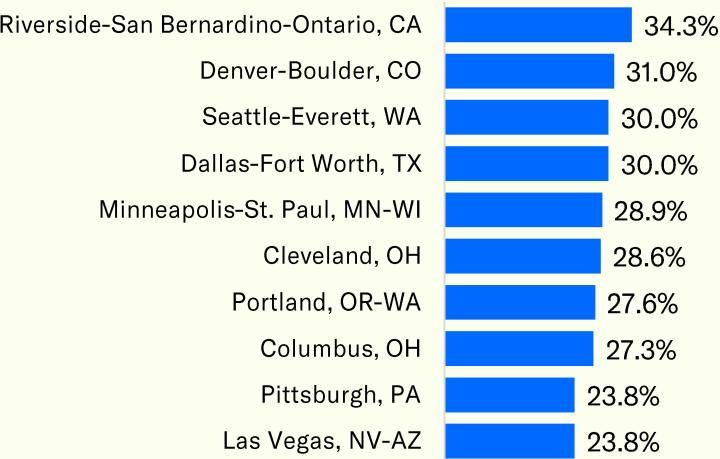
Question: In your opinion, which state or states are best at delivering each attribute? Please respond based on your current perception, whether you have been there before or not. Select up to three states per attribute. Dot placement indicates % selecting destination for attribute.

# Persona Prevalence\* Profile of Parks Explorers

Highest-Prevalence States

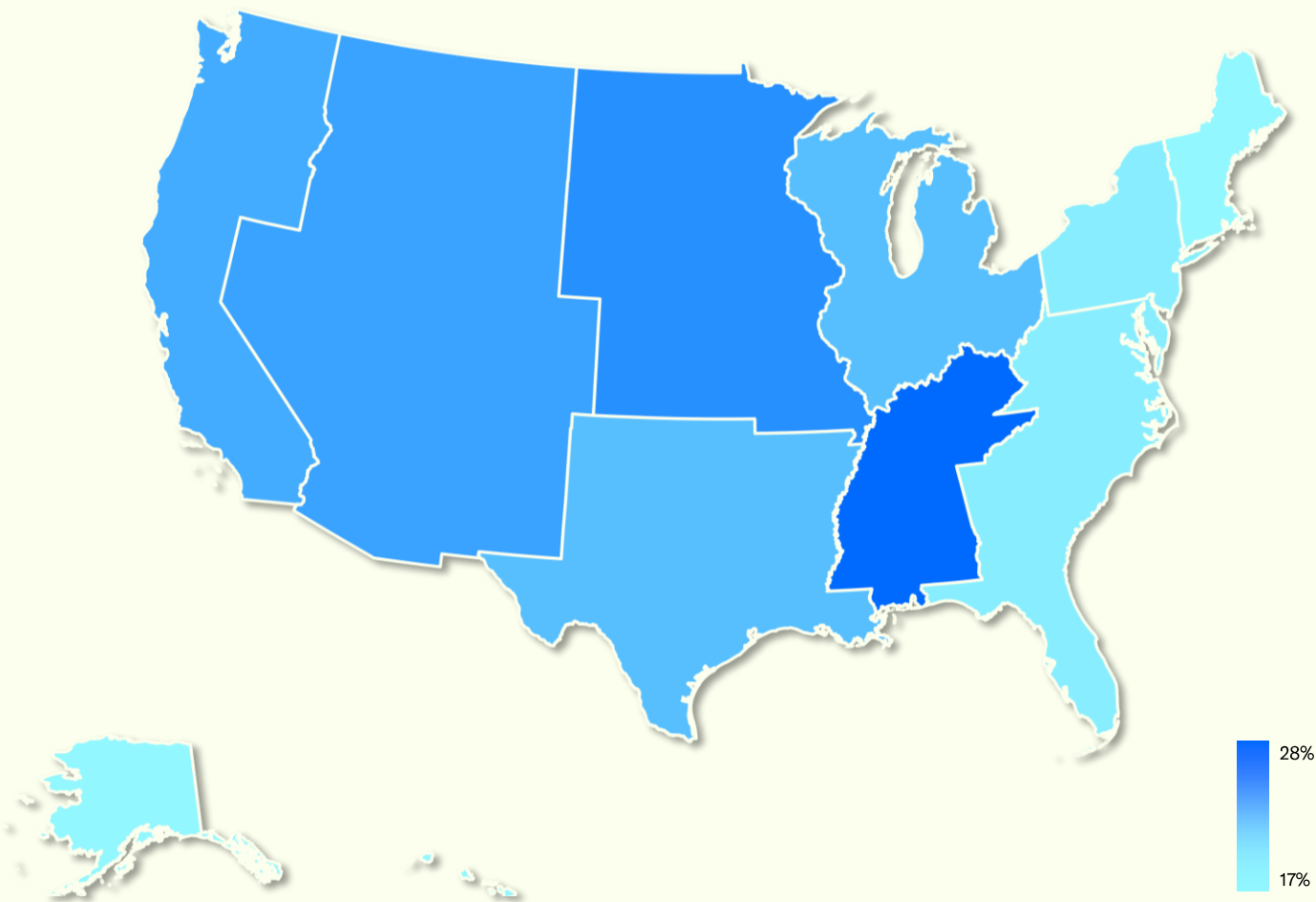


Highest-Prevalence DMAs



Future Partners

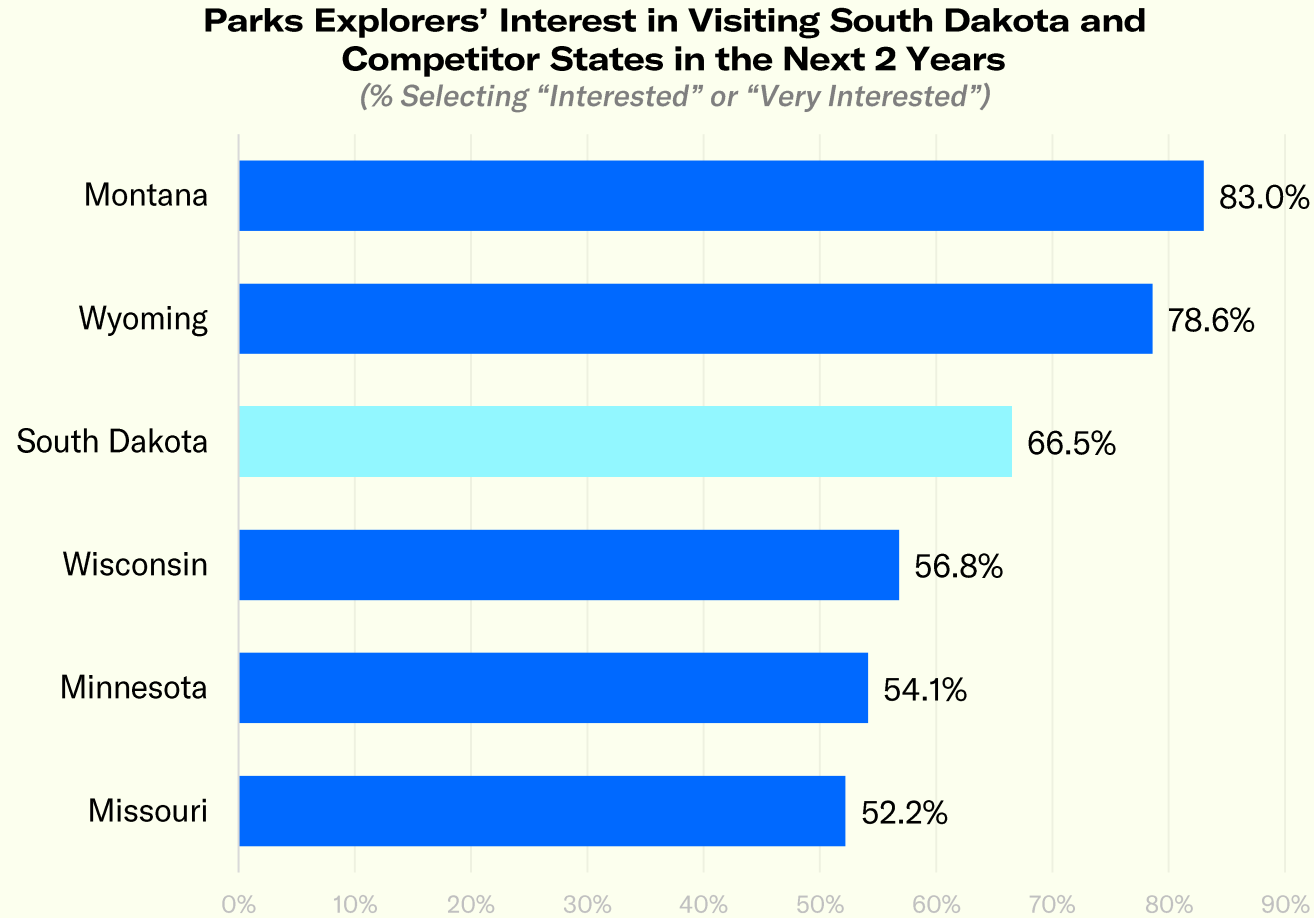
Map of Persona Prevalence (U.S. Divisions)



\*Persona Prevalence refers to the proportion of a population that can be categorized as a particular persona. For example, 37.5% of U.S. travelers in Utah from our Phase I study qualified as Parks Explorers.



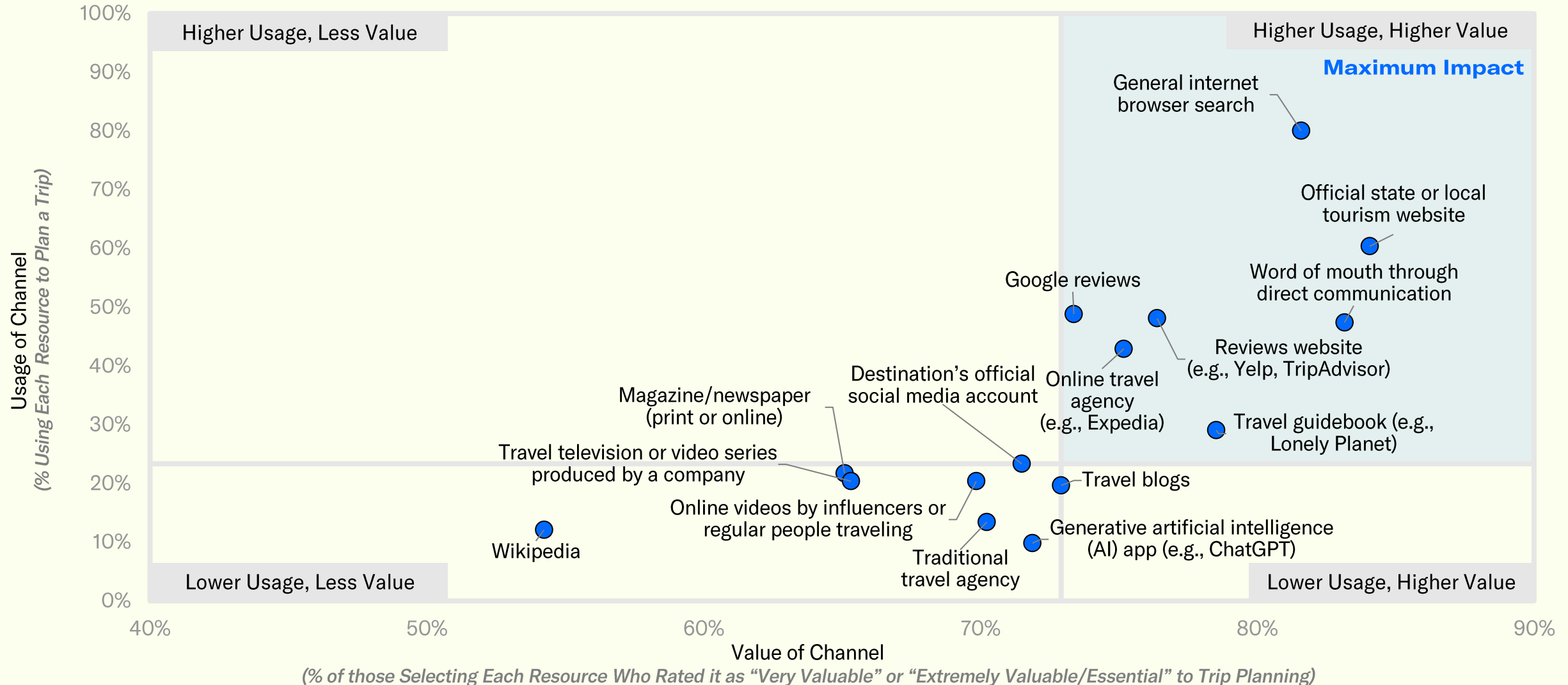
# Parks Explorers will be subject to more competition for the trip experiences they are most interested in.



Question: How interested are you in visiting the following states for an overnight leisure trip in the next 2 years?

Base: Parks Explorers. 977 completed surveys.

# Parks Explorers' most valued travel research resources include web searches, destination websites, and travel guidebooks.





# Scenic Beauty Appreciators

People who travel to appreciate the aesthetics of the natural environment; this includes people who regularly take scenic drives or train rides.



# Persona Definition: Scenic Beauty Appreciators



## Description

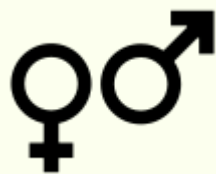
People who travel to appreciate the aesthetics of the natural environment; this includes people who regularly take scenic drives or train rides.

## Research/Operational Definition

- “Strongly agreed” with the statement, “*I often visit places to enjoy scenic beauty.*”
- “Strongly agreed” with at least one of the following statements:
  - “*I enjoy road trips because they allow me to observe the scenery.*”
  - “*I feel relaxed and/or happy when I travel through scenic environments.*”
- Selected “*Exploration*” or “*Relaxation*” as a motivator for their leisure travel

# Scenic Beauty Appreciators (SBAs): Who Are They?

## Gender



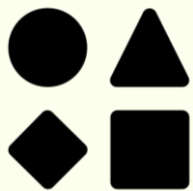
Woman	61.1%
Man	38.6%

## Average Age



Average Age	52.5 years
Boomers+	42.1%
Gen X	26.6%
Millennials	21.2%
Gen Z	10.2%

## Race / Ethnicity



White (Only)	81.1%
BIPOC	18.9%
Asian	3.6%
Black/African American	7.9%
Hispanic/Latino/a/e	5.8%
Other BIPOC	3.4%

Note: BIPOC stands for Black, Indigenous, and People of Color. Respondents were able to select more than one race, so percentages do not add up to 100.

## Marital Status



Married/partnered	58.8%
Single/unpartnered	41.2%

## Annual Household Income



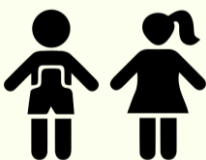
\$83,729  
\$100K+: 29.4%

## Travel Budget



\$4,319

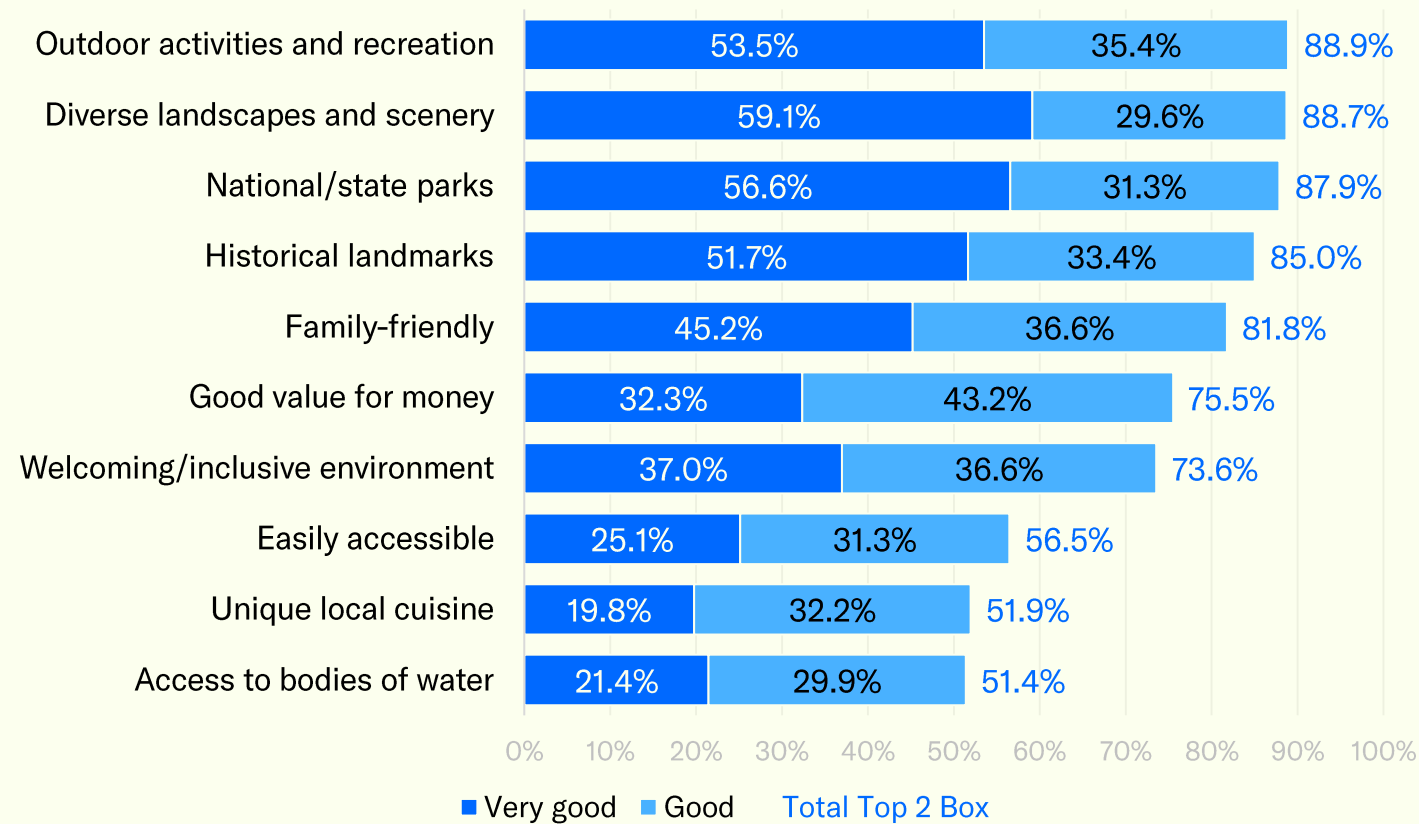
## Minor Children in Household



26.9%

# Scenic Beauty Appreciators think South Dakota’s biggest strength is also their top priority, diverse landscapes and scenery.

Scenic Beauty Appreciators’ Rating of South Dakota on Destination Attributes  
(% Rating South Dakota as “Good” or “Very Good”)

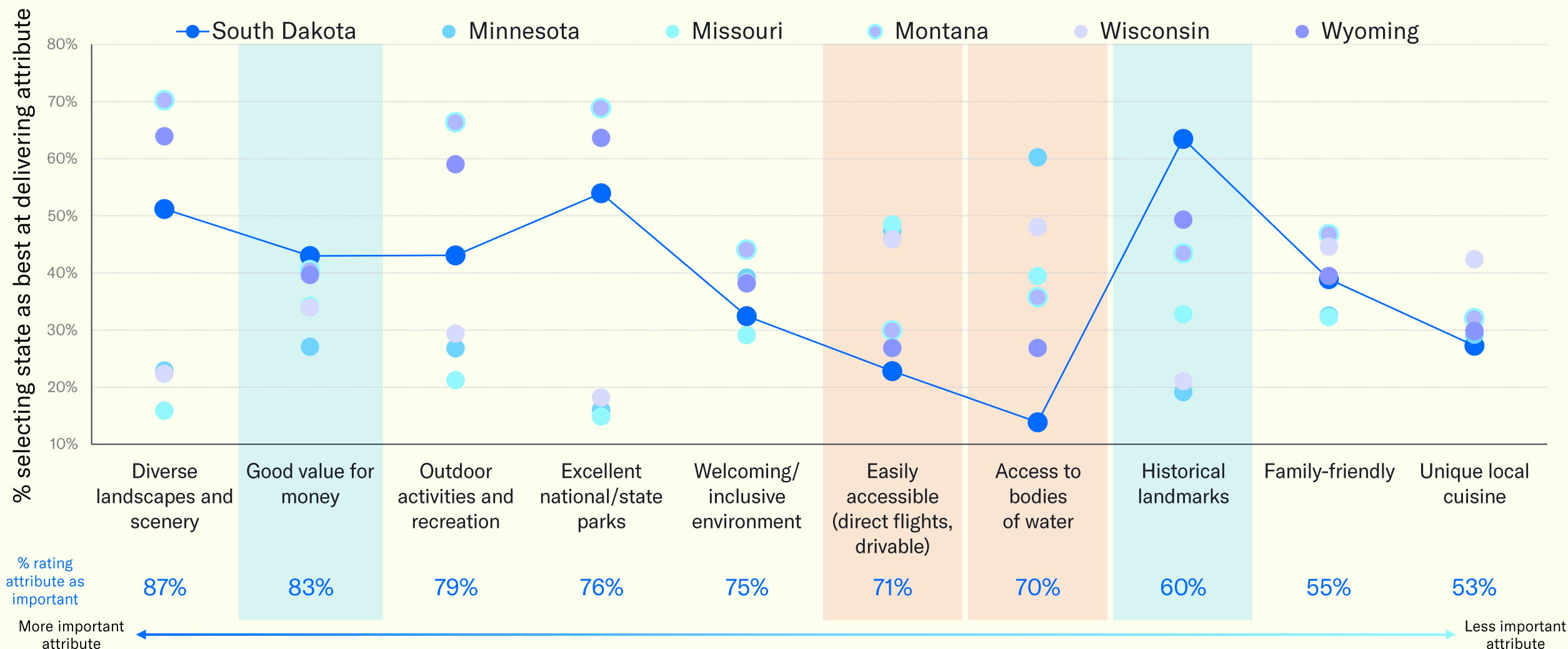


Question: Please rate South Dakota on the following attributes.  
Base: Scenic Beauty Appreciators. 1,082 completed surveys.



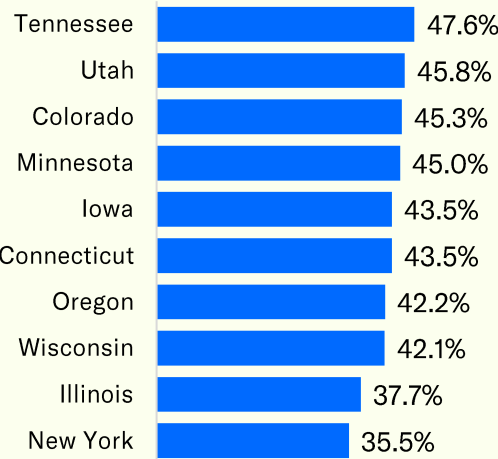
# SBA's see South Dakota as delivering relatively good value for money as well as besting competitors in historical landscapes.

Competitive Standing on **Scenic Beauty Appreciators'** Most Important Destination Attributes

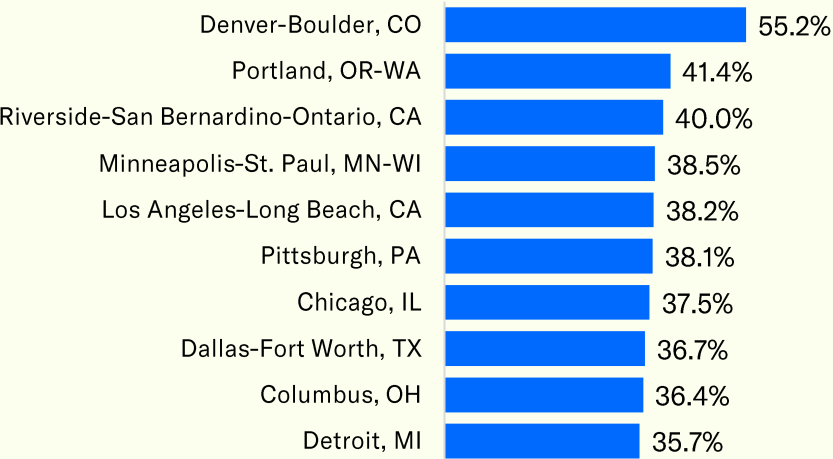


# Persona Prevalence\* Profile of Scenic Beauty Appreciators

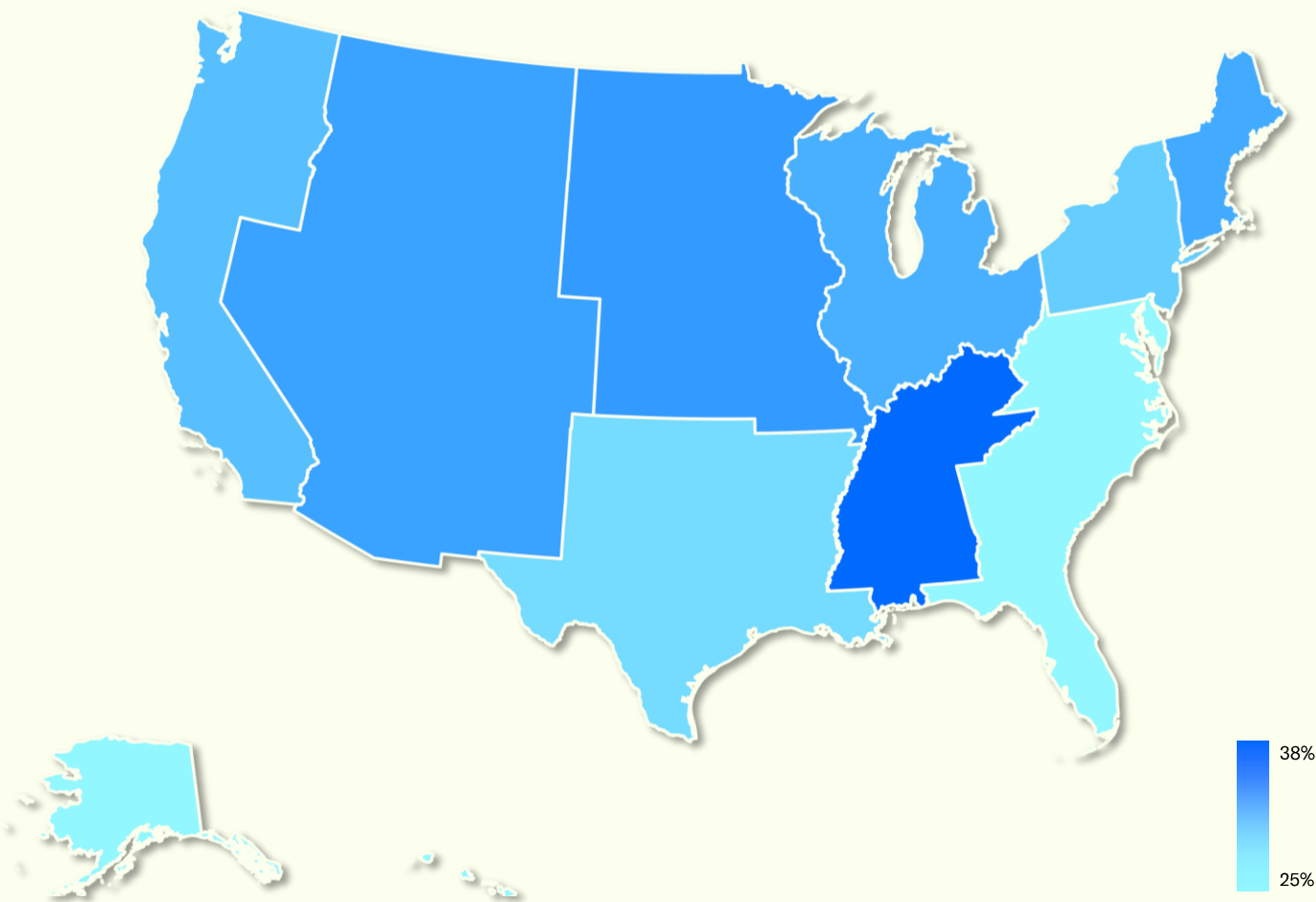
Highest-Prevalence States



Highest-Prevalence DMAs

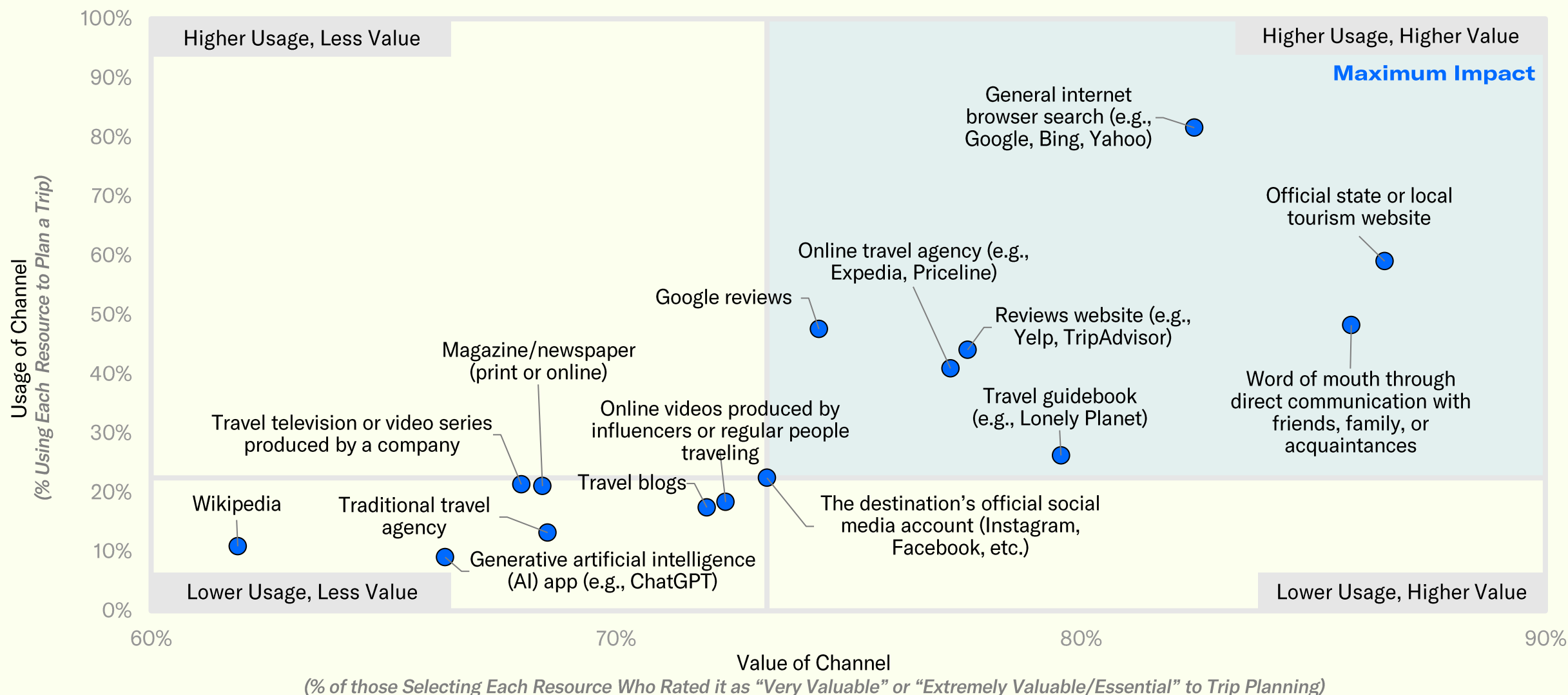


Map of Persona Prevalence (U.S. Divisions)



\*Persona Prevalence refers to the proportion of a population that can be categorized as a particular persona. For example, 47.6% of U.S. travelers in Tennessee from our Phase I study qualified as Scenic Beauty Appreciators.








# Scenic Beauty Appreciators primarily use and highly value general internet searches, official tourism websites, and word of mouth.





# YouTube reigns over other social media platforms in terms of both usage and perceived value among Scenic Beauty Appreciators.

**Scenic Beauty Appreciators' Usage and Valuation of Different Social Media Platforms for Destination Research & Trip Planning**

Platform	% Using	% Finding Very or Extremely Valuable/ Essential	Rank for Usage	Rank for Value
 YouTube	64.4%	79.6%	1	1
 Facebook	47.5%	58.6%	2	6
 Instagram	36.6%	66.2%	3	3/4
 TikTok	21.9%	74.3%	4	2
 Reddit	16.5%	66.5%	5	3/4
 X (formerly Twitter)	13.4%	60.7%	6	5
 Snapchat	8.9%	52.1%	7	7

**Questions:** Which of the following social media platforms have you used, or would you use, to learn more about a destination and/or plan a trip? & Listed below are the social media platforms you selected in the previous question. How valuable are the following platforms for learning about a travel destination and/or planning a trip?

Base: Scenic Beauty Appreciators. 1,082 completed surveys.

# The Wild Bunch

Families that love spending time together outdoors.

# Persona Definition: The Wild Bunch



## Description

Families that love spending time together outdoors.

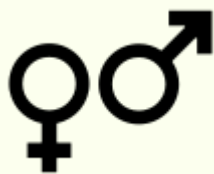
## Research/Operational Definition

- Selected “Important” or “Very important” in response to the question, “*When you travel with your children, how important is it to you that your family has the opportunity to spend time together in nature?*”
- “Generally agreed” or “Strongly agreed” with the statement, “*My family goes out of its way to find great outdoor travel experiences.*”



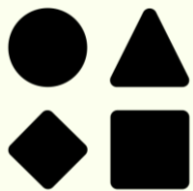
# The Wild Bunch: Who Are They?

## Gender



Woman	60.8%
Man	39.3%

## Race / Ethnicity



White (Only)	69.0%
BIPOC	31.0%
Asian	4.5%
Black/African American	13.5%
Hispanic/Latino/a/e	11.3%
Other BIPOC	3.3%

Note: BIPOC stands for Black, Indigenous, and People of Color. Respondents were able to select more than one race, so percentages do not add up to 100.

## Average Age



Average Age	42.9 years
Boomers+	9.8%
Gen X	37.8%
Millennials	44.8%
Gen Z	7.8%

## Marital Status



Married/partnered	68.7%
Single/Unpartnered	31.3%

## Annual Household Income



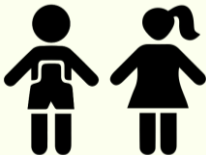
**\$89,133**  
\$100K+: 33.4%

## Travel Budget



**\$4,189**

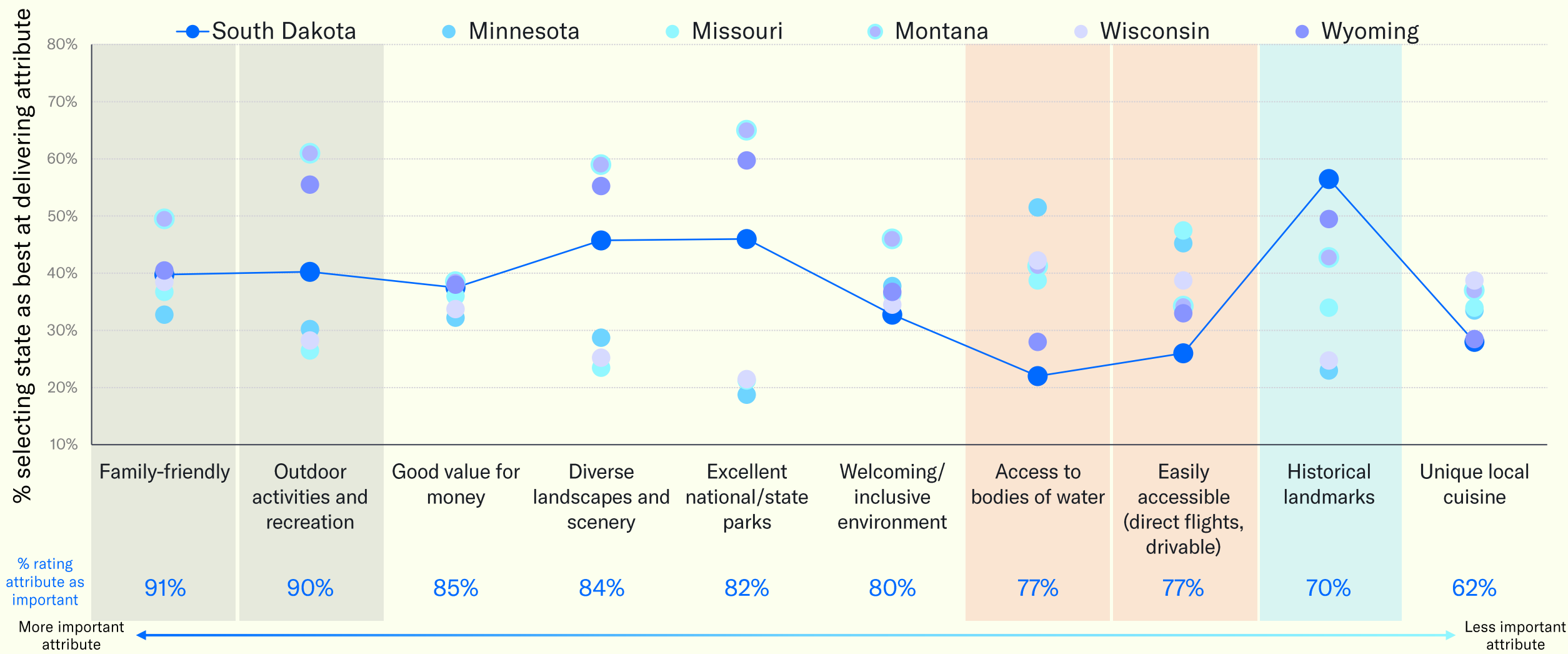
## Minor Children in Household



**100%**

# South Dakota has room to grow in its competitive position with The Wild Bunch in terms of their most important attributes.

Competitive Standing on **The Wild Bunch's** Most Important Destination Attributes

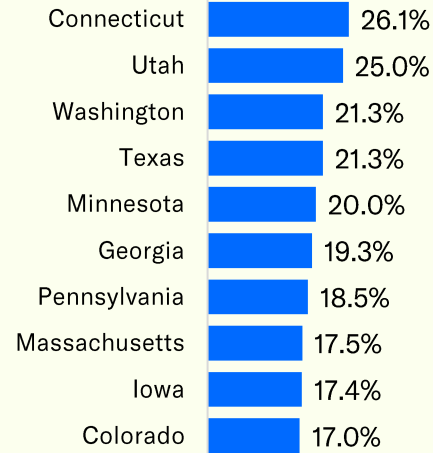


Future Partners

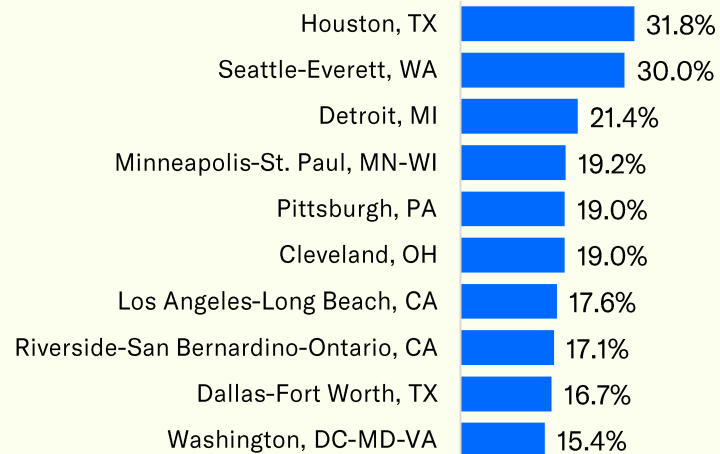
Question: In your opinion, which state or states are best at delivering each attribute? Please respond based on your current perception, whether you have been there before or not. Select up to three states per attribute. Dot placement indicates % selecting destination for attribute.

# Persona Prevalence Profile\* of The Wild Bunch

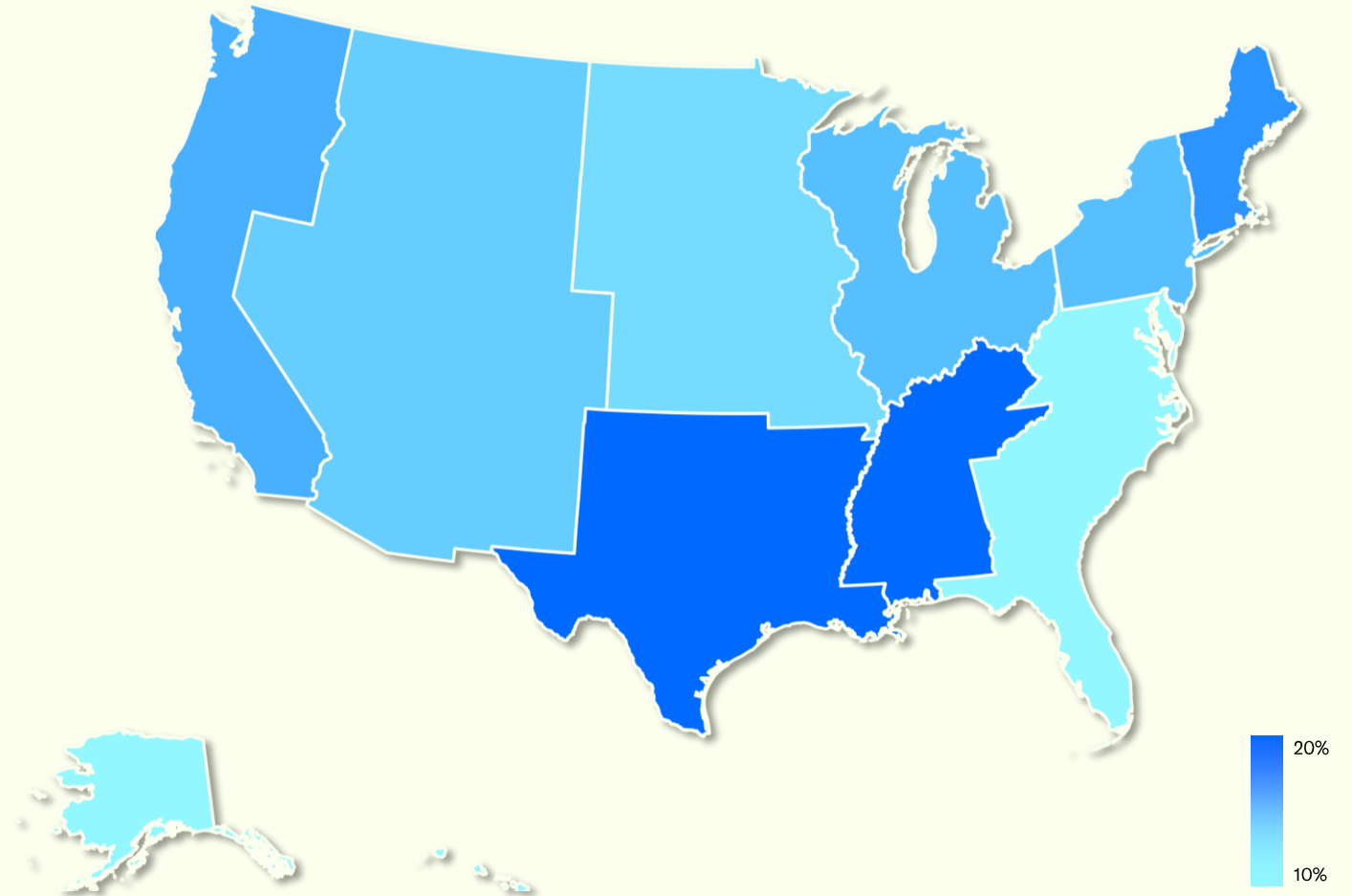
## Highest-Prevalence States



## Highest-Prevalence DMAs



## Map of Persona Prevalence (U.S. Divisions)

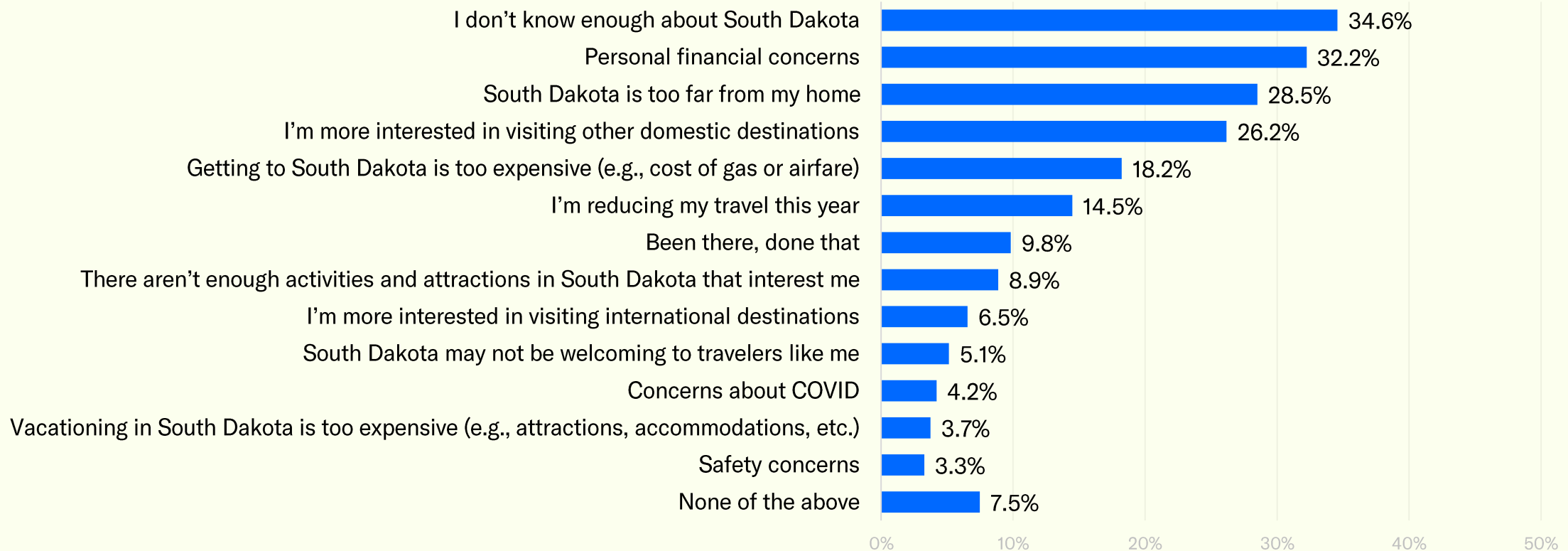


\*Persona Prevalence refers to the proportion of a population that can be categorized as a particular persona. For example, 26.1% of U.S. travelers in Connecticut from our Phase I study qualified as The Wild Bunch.



# The Wild Bunch's chief deterrent to visiting South Dakota is not knowing enough about the state.

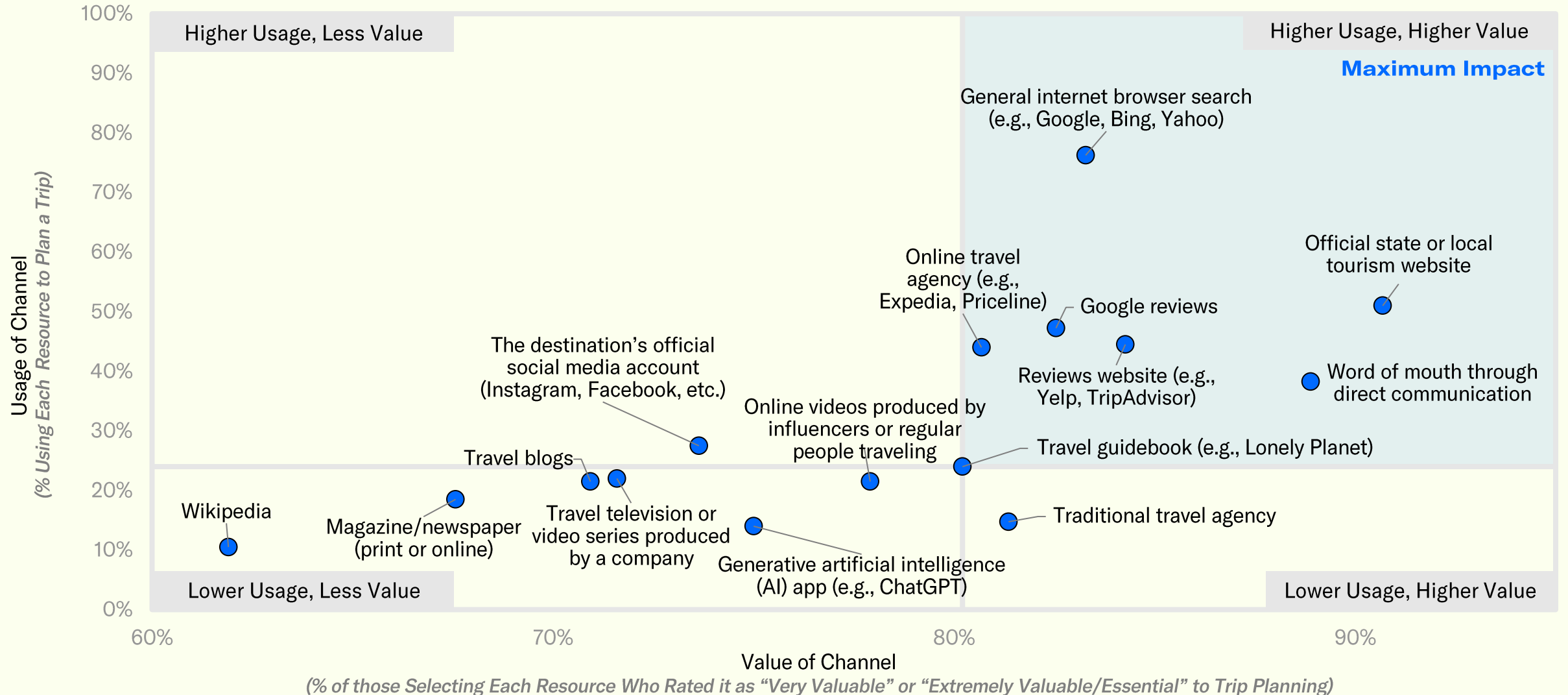
**Deterrents to Visiting South Dakota Among The Wild Bunch**  
(% of The Wild Bunch Selecting Each as Keeping Them From Visiting South Dakota)



**Question:** Which of these (if any) are keeping you from visiting South Dakota?

**Base:** The Wild Bunch who are “not at all,” “somewhat,” or “moderately” likely to visit South Dakota in the next 2 years or in the future ever. 214 completed surveys.

# The Wild Bunch uses official tourism websites less than others, but they value these sites overwhelmingly, at a rate of over 90%.



# High-Level Summary

# Personas generally prioritize diverse landscapes, outdoor rec, and value for money when selecting a vacation destination.

## Top 3 Destination Attributes per Persona

(% of Each Persona Selecting “Very Important” or “Extremely Important: This Is a Critical Factor in My Decision.” for Each Destination Attribute)

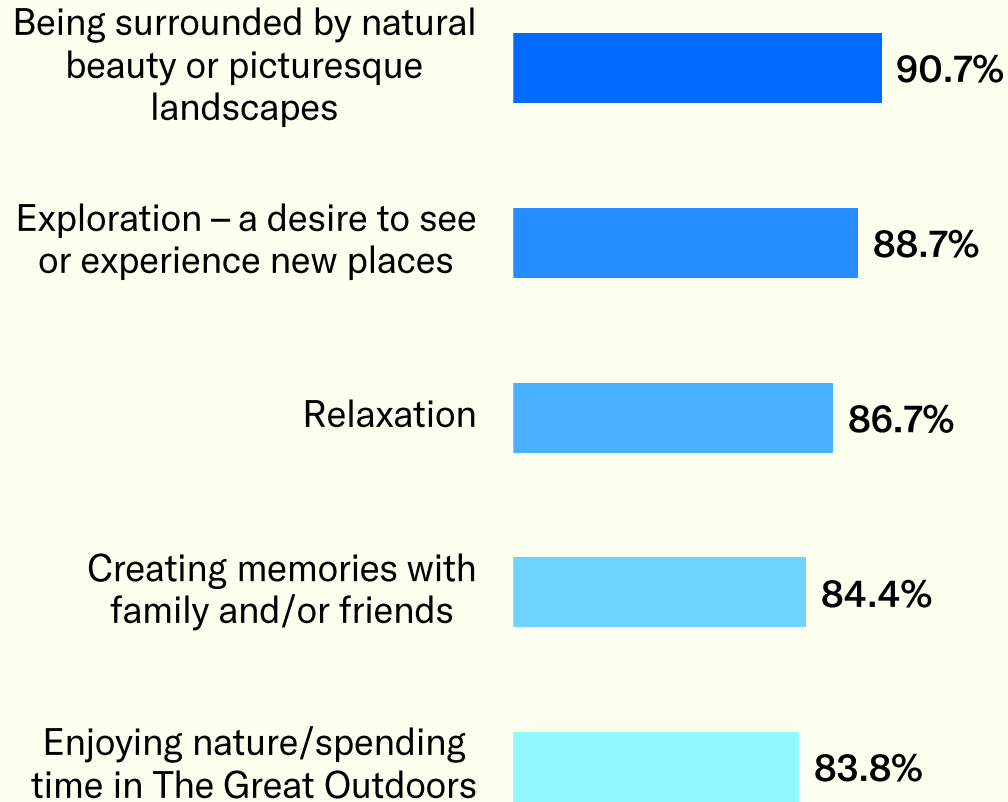
Rank	American History Lovers	Contrarians	Parks Explorers	Scenic Beauty Appreciators	The Wild Bunch
1	Historical landmarks (89%)	Good value for money (76%)	Outdoor activities and recreation (85%)	Diverse landscapes and scenery (87%)	Family-friendly (91%)
2	Good value for money (85%)	Diverse landscapes and scenery (73%)	Diverse landscapes and scenery (84%)	Good value for money (83%)	Outdoor activities and recreation (90%)
3	Diverse landscapes and scenery (83%)	Outdoor activities and recreation (63%)	Excellent national/ state parks (82%)	Outdoor activities and recreation (79%)	Good value for money (85%)

Question: In general, how important are the following attributes of a destination to how you decide where to go for a leisure trip?  
Base: American History Lovers n=557, Contrarians n=462, Parks Explorers n=977, Scenic Beauty Appreciators n=1,082, The Wild Bunch n=400.



### Top 5 Travel Motivators

*% of Highest-Value Target Travelers Rating Each as Very or Extremely Motivating*



Question: What motivates you to travel? Use the scale to evaluate each.  
Base: Phase II survey. All respondents. 2,000 completed surveys.

**The desire to be surrounded by natural beauty & picturesque landscapes is a top travel motivator across all five selected target personas.**

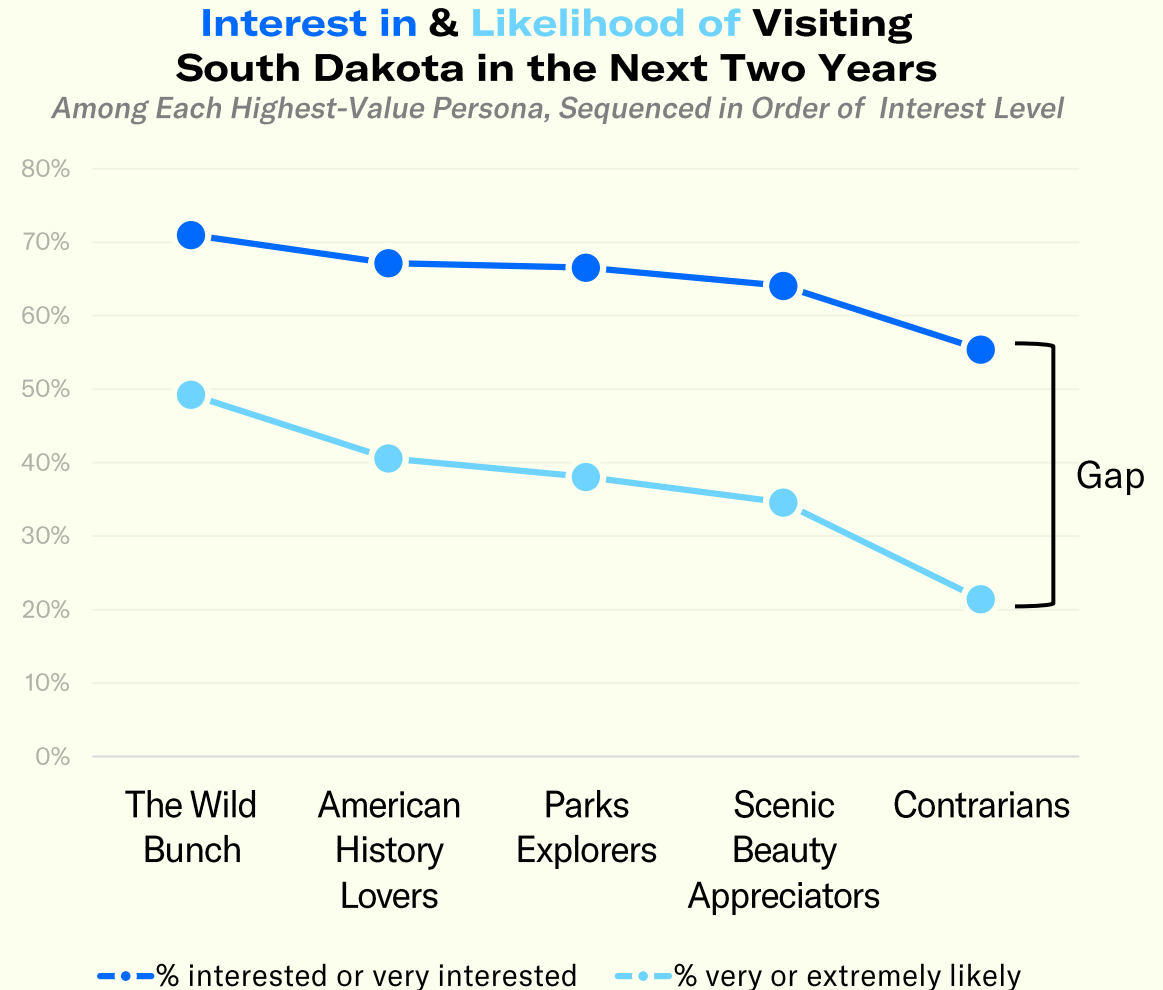
# The desire to be surrounded by natural beauty or picturesque landscapes is a top 2 motivator across personas.

**Top 5 Travel Motivators per Persona**  
*(% of Each Persona Selecting “Very Motivating” or “Extremely Motivating” for Each Reason)*

Rank	American History Lovers	Contrarians	Parks Explorers	Scenic Beauty Appreciators	The Wild Bunch
1	Exploration – a desire to see or experience new places (92%)	Being surrounded by natural beauty or picturesque landscapes (88%)	Being surrounded by natural beauty or picturesque landscapes (96%)	Being surrounded by natural beauty or picturesque landscapes (97%)	Exploration – a desire to see or experience new places (94%)
2	Being surrounded by natural beauty or picturesque landscapes (89%)	Relaxation (84%)	Enjoying nature/spending time in The Great Outdoors (96%)	Exploration – a desire to see or experience new places (94%)	Being surrounded by natural beauty or picturesque landscapes (94%)
3	Creating memories with family and/or friends (89%)	Enjoying nature/spending time in The Great Outdoors (84%)	Exploration – a desire to see or experience new places (94%)	Enjoying nature/spending time in The Great Outdoors (91%)	Providing life experiences for my children (94%)
4	Experiencing the culture of a place(s) (87%)	Exploration – a desire to see or experience new places (84%)	Relaxation (87%)	Relaxation (89%)	Creating memories with family and/or friends (93%)
5	Relaxation (86%)	Escaping the stress of my daily life (77%)	Creating memories with family and/or friends (87%)	Creating memories with family and/or friends (88%)	Enjoying nature/spending time in The Great Outdoors (93%)

Question: What motivates you to travel? Use the scale to evaluate each.  
Base: American History Lovers n=557, Contrarians n=462, Parks Explorers n=977, Scenic Beauty Appreciators n=1,082, The Wild Bunch n=400.

Gaps between interest in & likelihood of visiting South Dakota in the next two years signal an **opportunity to convert intrigue into action.**



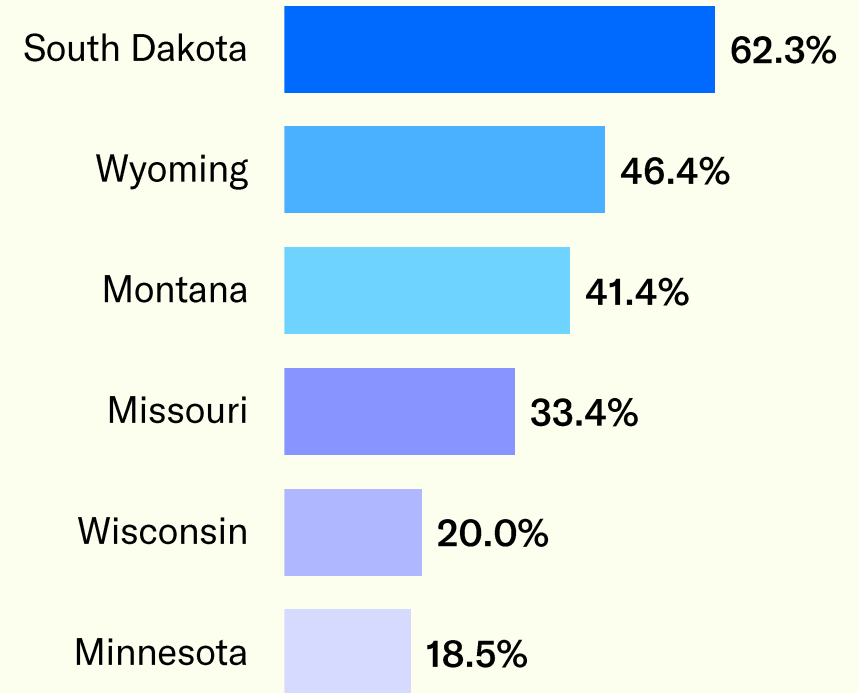
Questions: How interested are you in visiting the following states for an overnight leisure trip in the next 2 years? – South Dakota.  
How likely are you to visit South Dakota for an overnight leisure trip... – ...in the next 2 years?  
Base: All respondents. 2,000 completed surveys

# South Dakota's biggest competitive strength is its historical landmarks, which are ranked #1 across personas.

Across personas, South Dakota enjoys an over-10-point lead over Wyoming, the silver medalist.

## Who's Got the Best Historical Landmarks?

*% of Highest-Value Target Travelers Selecting Each State*



Question: In your opinion, which state or states are best at delivering each attribute? Please respond based on your current perception, whether you have been there before or not.

Base: All respondents. 2,000 completed surveys

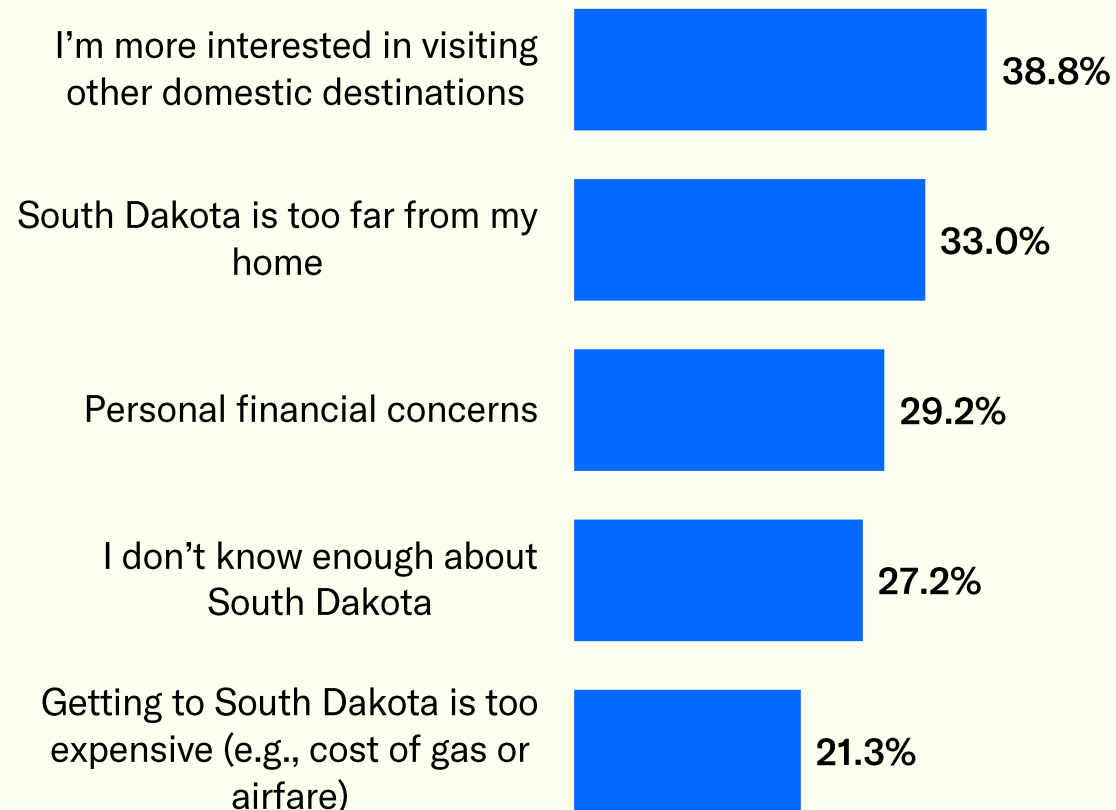


# The most common deterrent to visiting South Dakota is the opportunity cost.

Travelers are most likely to cite a preference for other domestic destinations as a factor keeping them from visiting.

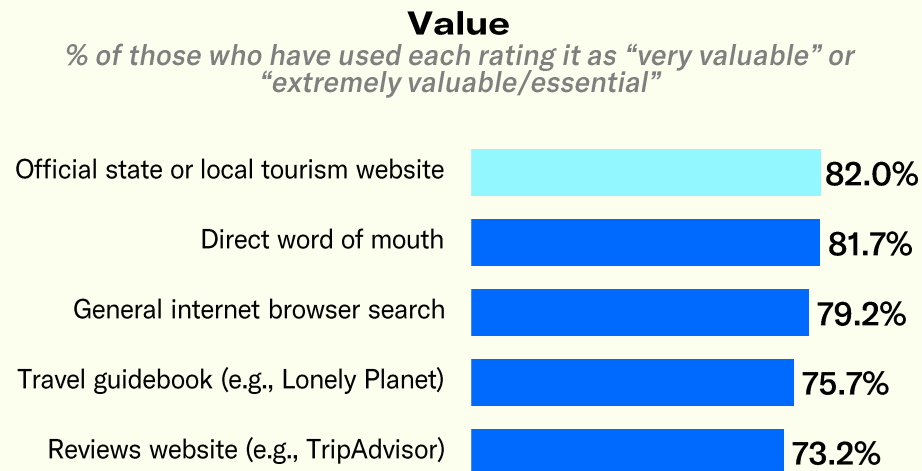
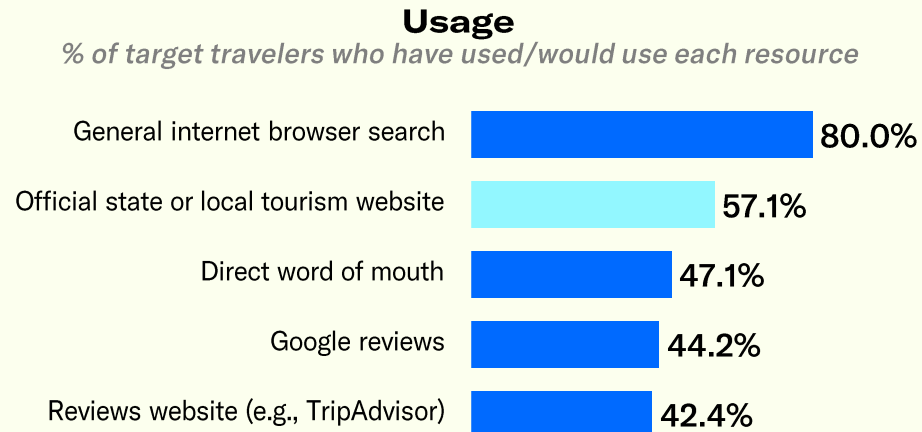
## Top 5 Deterrents to Visiting South Dakota

*% of Highest-Value Target Travelers Selecting*



Question: Which of these (if any) are keeping you from visiting South Dakota?  
Base: All respondents who are "not at all," "somewhat," or "moderately" likely to visit South Dakota in the next 2 years or in the future ever. 1,440 completed surveys.

## Top 5 Trip Planning Resources

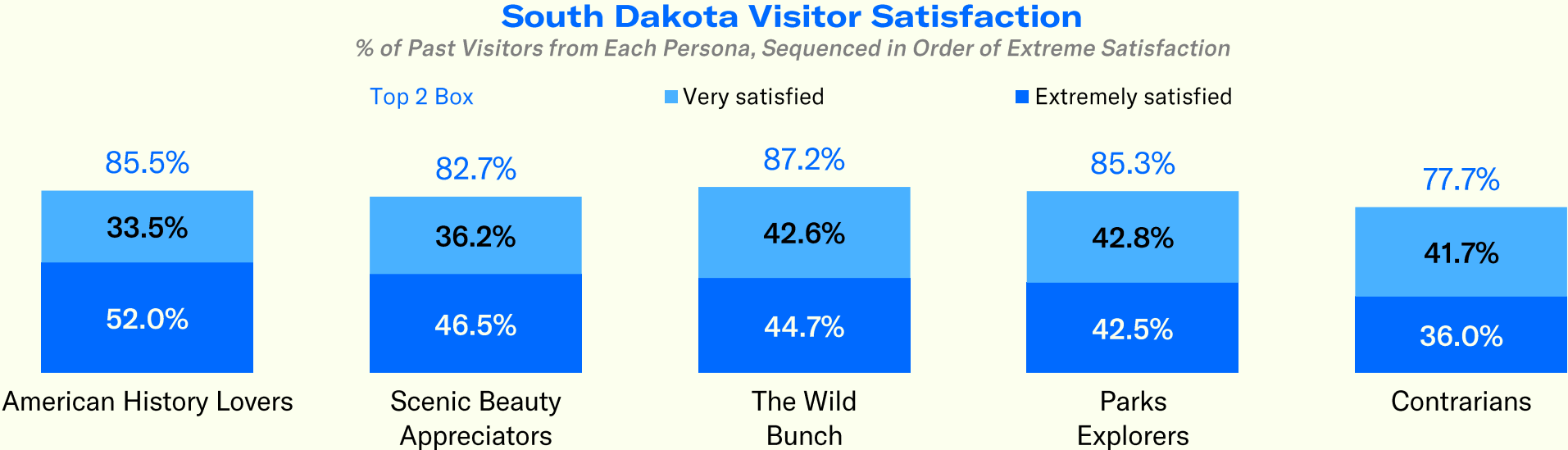


**Questions:** Which of the following resources have you used, or would you use, to plan a trip? & Listed below are the resources you selected in the previous question. How valuable are/were the following resources for your trip planning?

**The highest-value personas frequently use and highly value **official state or local tourism websites** for trip planning.**

These websites are the top resource most valued by users, underscoring the importance of optimizing TravelSouthDakota.com

# Most past visitors among the target personas were **highly satisfied** with their most recent trip.



Question: You indicated that you've visited South Dakota for leisure travel as an adult. How satisfied were you with your most recent trip to South Dakota?  
Base: Respondents who have visited South Dakota as an adult. 713 completed surveys.

# Testing Different Branding/ Positioning Statements



# Brand Positioning Statements

*“South Dakota provides a sense of freedom, optimism, nostalgia, and the opportunity to connect with the great outdoors.”*

*“South Dakota is the ultimate road trip destination, with world-famous roadside attractions and historic national parks.”*

*“South Dakota is the ultimate vacation destination for families, with historic state and national parks, Old West, Pioneer, and Indigenous history and culture, and family-friendly attractions.”*

*“South Dakota provides unexpected and off-the-beaten-path adventures for the mystery-starved traveler longing for an authentic experience.”*



# All statements appealed to a majority of each persona, but a focus on family, history, and culture sparked the most interest.

## South Dakota Branding Statement Appeal

(% of Each Persona Rating Each Statement as Making a Visit to South Dakota Sound “Very Appealing” or “Extremely Appealing”)

Branding/Positioning Statement	American History Lovers	Contrarians	Parks Explorers	Scenic Beauty Appreciators	The Wild Bunch
South Dakota provides a sense of freedom, optimism, nostalgia, and the opportunity to connect with the great outdoors.	69.7%	58.0%	67.0%	68.5%	75.3%
South Dakota is the ultimate road trip destination, with world famous roadside attractions and historic national parks.	72.5%	57.1%	68.6%	70.1%	75.8%
South Dakota is the ultimate vacation destination for families, with historic state and national parks, Old West, Pioneer, and Indigenous history and culture, and family-friendly attractions.	77.7%	62.3%	71.6%	72.8%	81.0%
South Dakota provides unexpected and off-the-beaten path adventures for the mystery-starved traveler longing for an authentic experience.	67.1%	54.1%	64.9%	65.2%	71.0%

Question: Regardless of your answer above, how appealing does this description make visiting South Dakota?  
Base: American History Lovers n=557, Contrarians n=462, Parks Explorers n=977, Scenic Beauty Appreciators n=1,082, The Wild Bunch n=400.

Most appealing  
for the persona

# South Dakota is most believably positioned as a family-friendly destination with historic natural and cultural attractions.

South Dakota Branding Statement **Believability**  
(% of Each Persona Rating Each Statement as “Very Believable” or “Extremely Believable”)

Branding/Positioning Statement	American History Lovers	Contrarians	Parks Explorers	Scenic Beauty Appreciators	The Wild Bunch
South Dakota provides a sense of freedom, optimism, nostalgia, and the opportunity to connect with the great outdoors.	70.7%	61.3%	68.3%	70.8%	73.5%
South Dakota is the ultimate road trip destination, with world famous roadside attractions and historic national parks.	68.4%	55.0%	66.4%	67.0%	73.8%
South Dakota is the ultimate vacation destination for families, with historic state and national parks, Old West, Pioneer, and Indigenous history and culture, and family-friendly attractions.	80.1%	66.9%	72.4%	75.9%	80.0%
South Dakota provides unexpected and off-the-beaten path adventures for the mystery-starved traveler longing for an authentic experience.	68.9%	54.1%	64.0%	64.4%	71.8%

Question: How believable does this statement sound, based on your current perception of South Dakota?  
Base: American History Lovers n=557, Contrarians n=462, Parks Explorers n=977, Scenic Beauty Appreciators n=1,082, The Wild Bunch n=400.

Most believable  
to the persona



## David Reichbach

Vice President of Development  
dreichbach@futurepartners.com

# Thank You!



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Livestream Calendar



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