

The State of South Dakota Travel

Future Partners

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

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Global Travel Sentiment

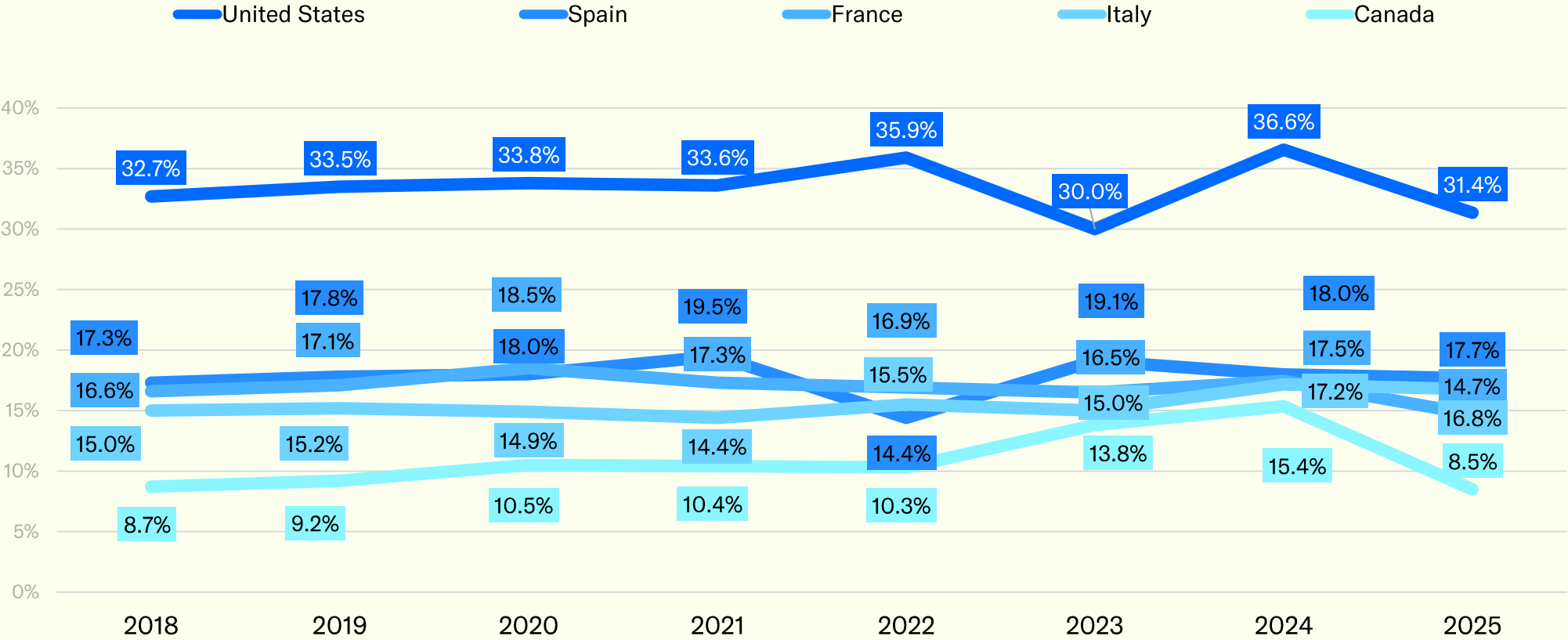
The State of the International Traveler

- Tracking study conducted since 2014
- Online survey methodology
 - Screened for likely international travel in the next 3 years
- 800 fully completed surveys were collected from a random sample of likely international travelers in each market
- In total, 12,800 completed surveys were collected

SAMPLE SIZE	
Argentina	800
Australia	800
Brazil	800
Canada	800
China	800
Colombia	800
France	800
Germany	800
India	800
Italy	800
Japan	800
Mexico	800
Netherlands	800
South Korea	800
Spain	800
United Kingdom	800
TOTAL	12,800

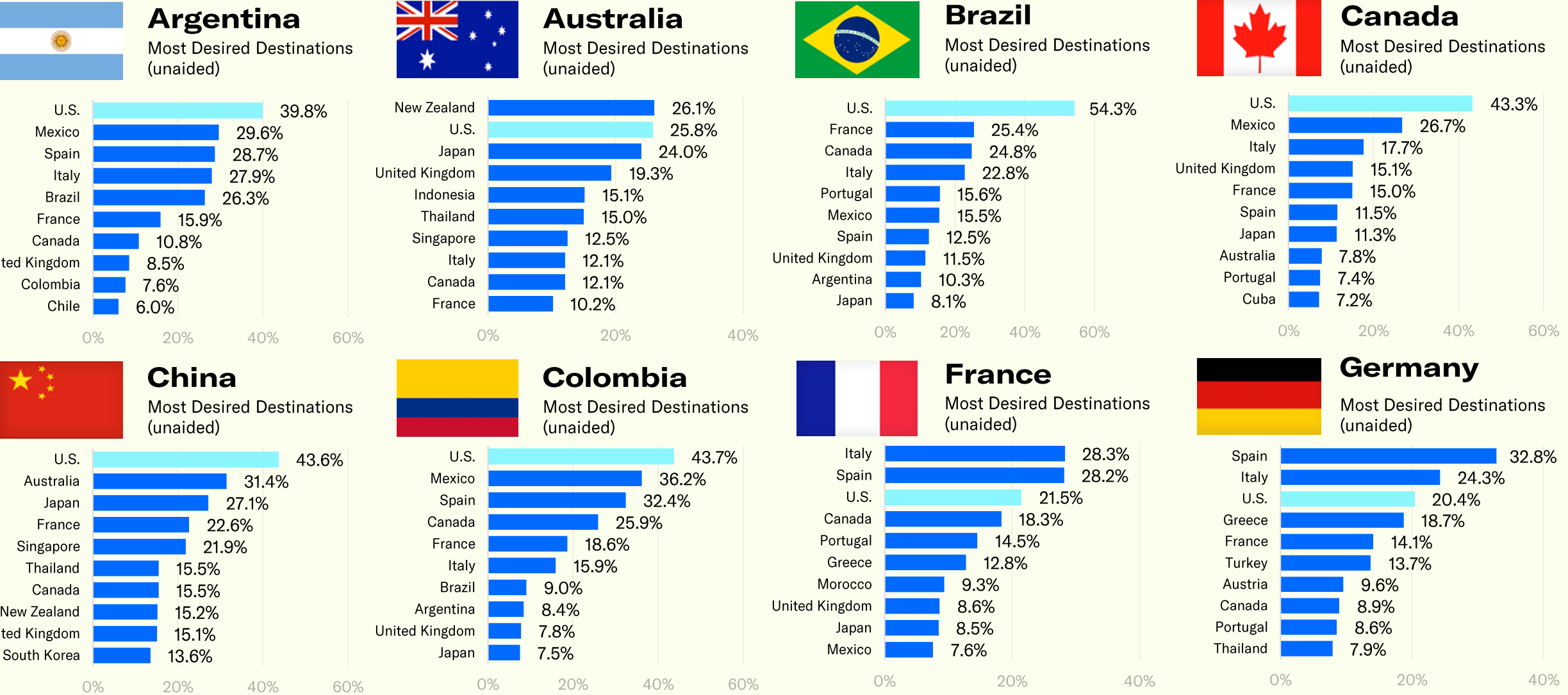
The USA Continues to Rank First as a Most Desired International Destination

Most Desired International Destinations: 2018—2025
(Unaided, Total Aggregate)



The Netherlands, Spain, France and Germany are the Most Competitive Markets for the USA to Stand Out

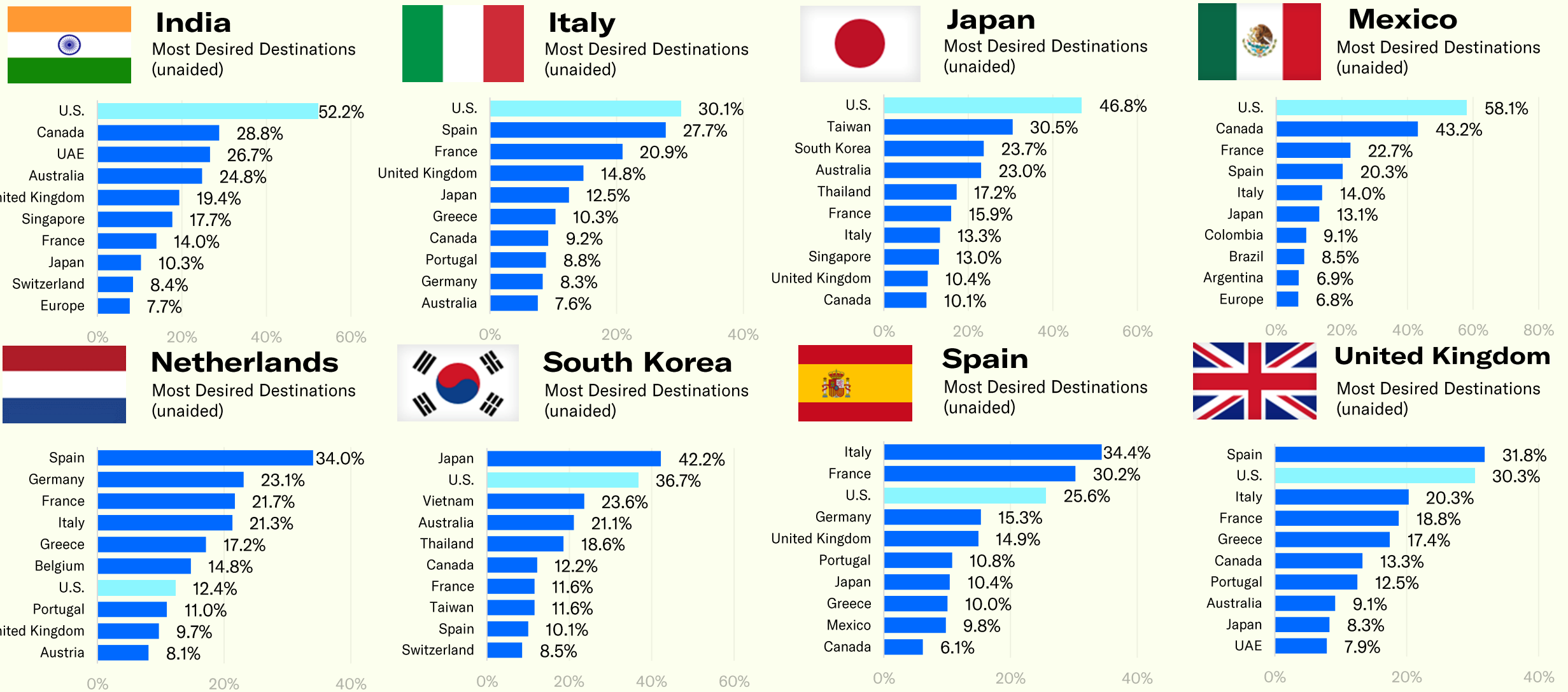
Question: What are the three foreign countries that you would most like to visit in the next 12 months?



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In Mexico, Canada, China, India, Japan, Brazil, Columbia and Argentina, the USA is Exceptionally Competitive as an International Destination Brand

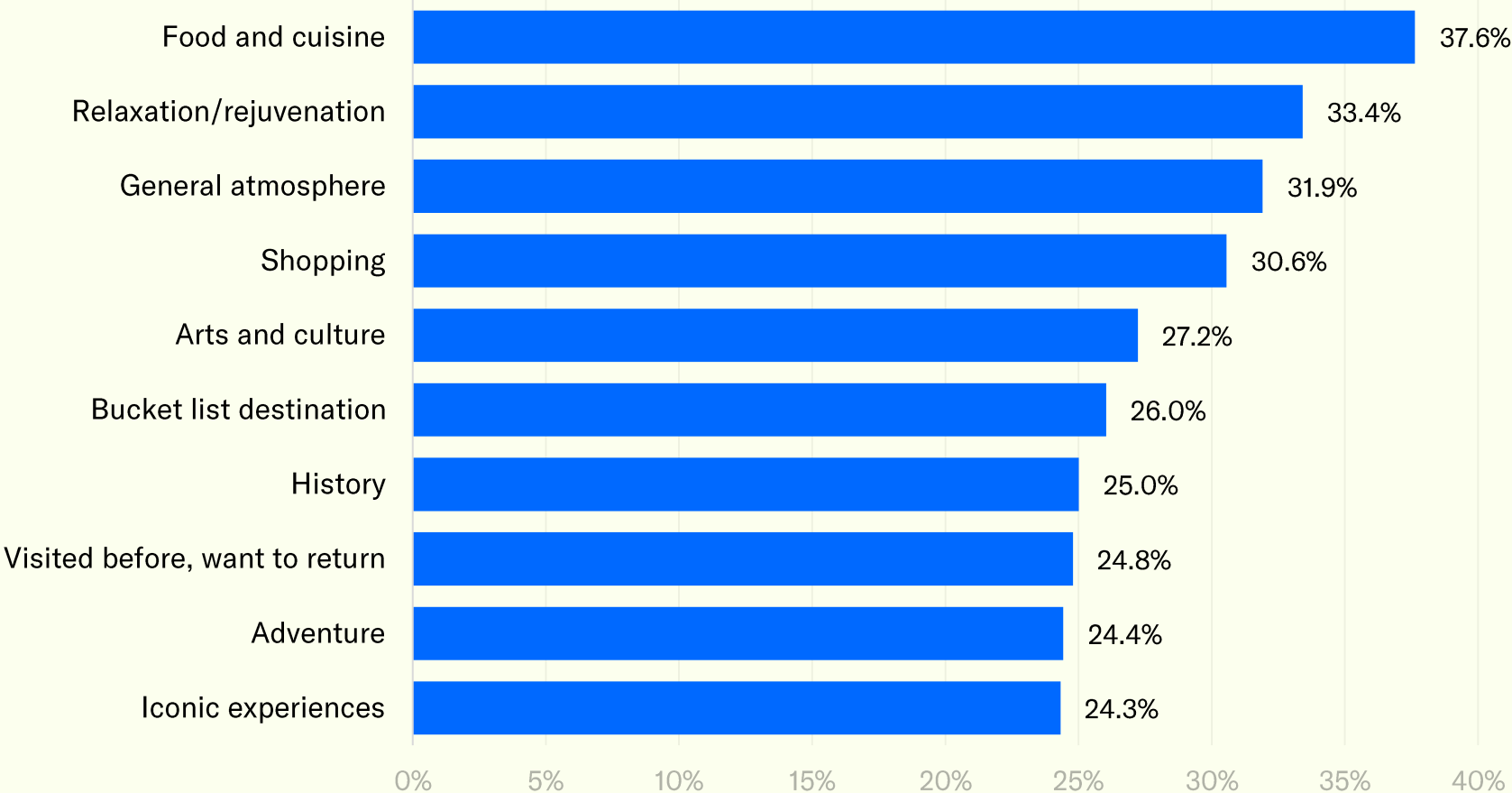
What are the three FOREIGN COUNTRIES that you would most like to visit in the next 12 months?



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Aspiration to Visit the USA is Driven by our Food, Shopping, Atmosphere and Opportunities for Rejuvenation

Top 10 Reasons Why Global Travelers Want to Visit the U.S. in the Next Year



Deterrents to Visiting the U.S.

Question: Which best describe your current reasons for not visiting the United States more frequently? (Select all that apply)

Overall Ranking - Deterrents to Visiting the U.S.

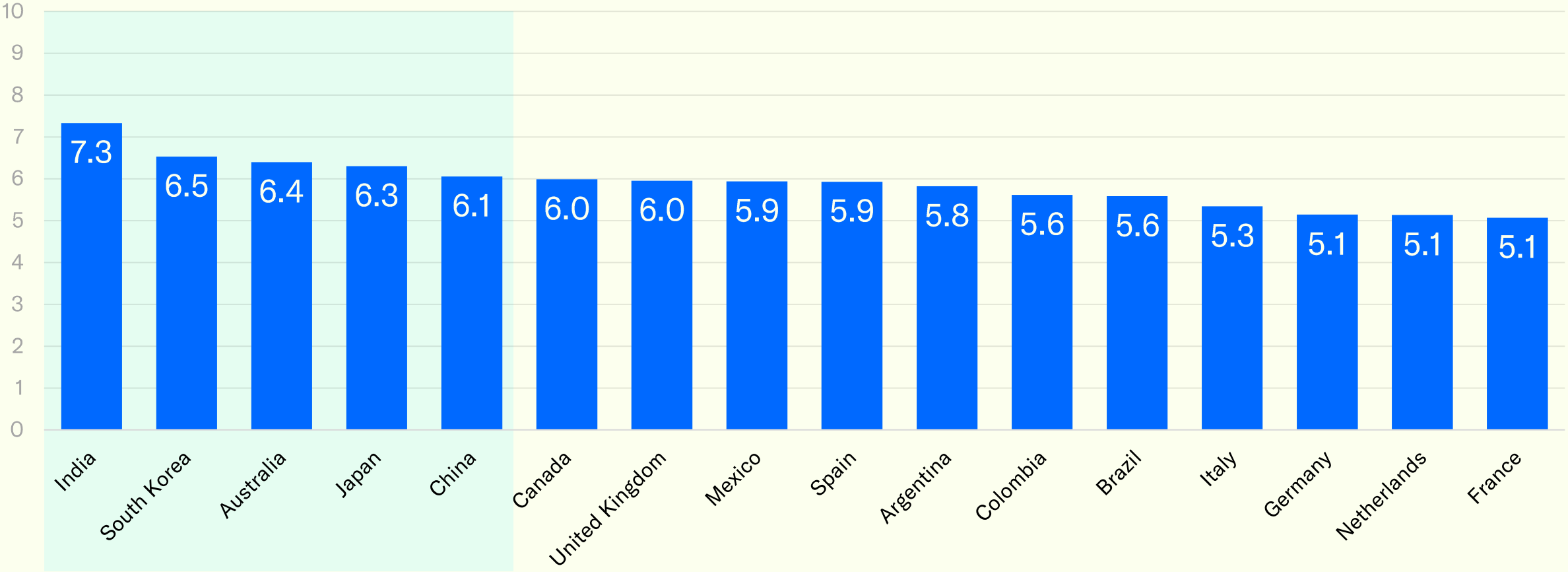


Base: Total (12,800 responses).

International Travelers Concerns about their Personal Safety in the USA is Elevated

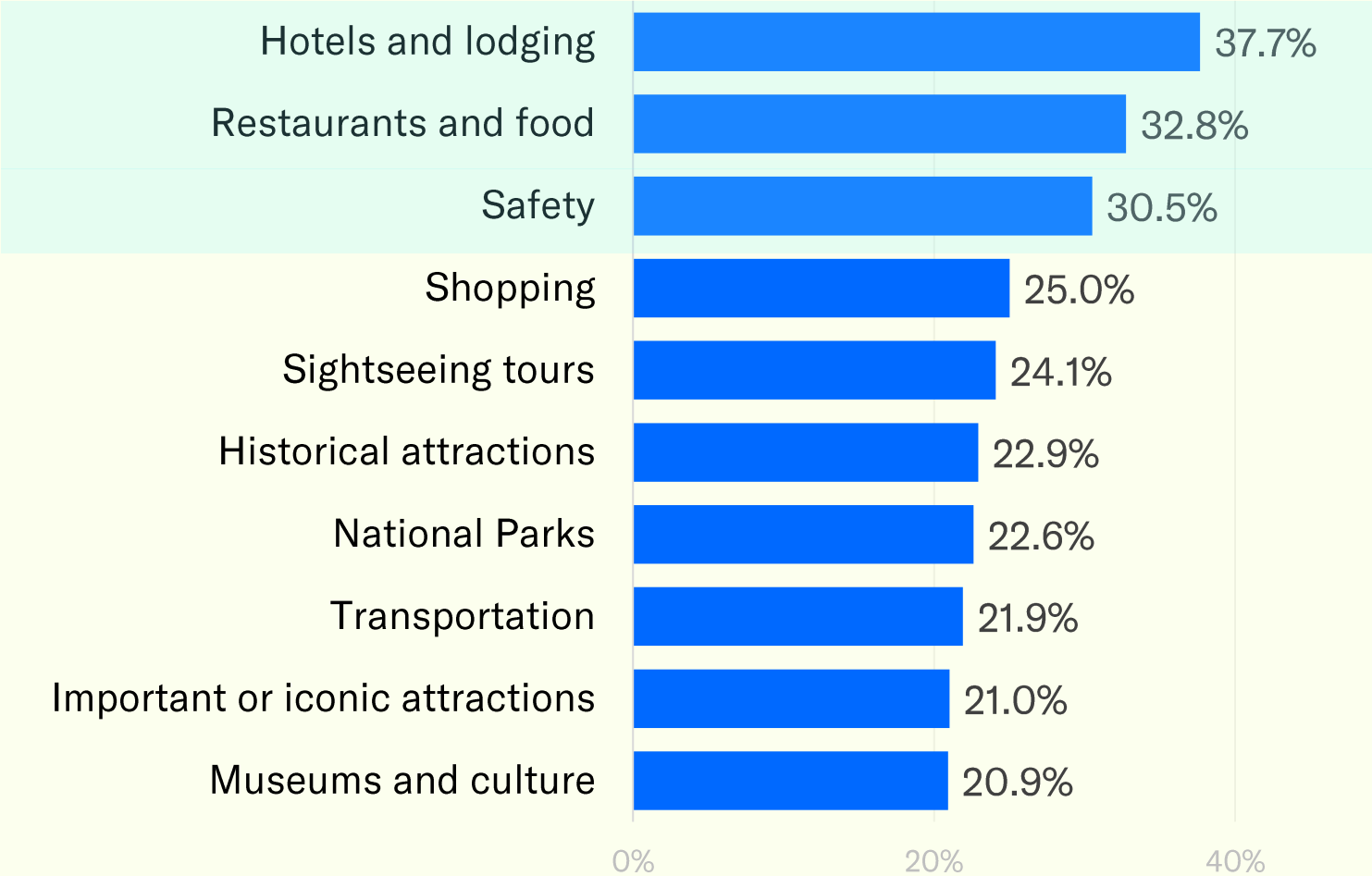
Average Safety Concern Levels by Market
Scale of 0 (“Not at all concerned”) to 10 (“Extremely high concern”)

5.9
Aggregate
average








Safety is Among the Most Compelling Content for U.S. Destination Decisions

Top 10 Important Content Categories for Destination Decisions
% of Total Aggregate



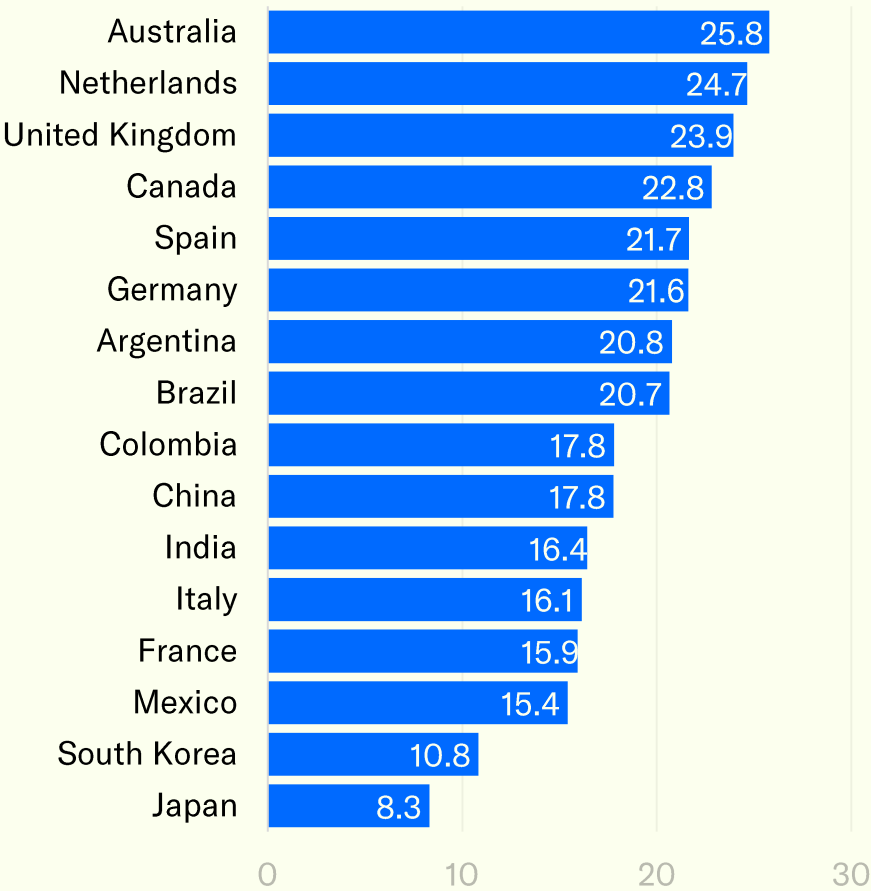
Safety Information

	% of market	ranking
	43.6%	#3
	36.8%	#3
	34.0%	#1
	33.5%	#1
	33.0%	#3

The Universe of Opportunity to Attract Global Travelers is Strong

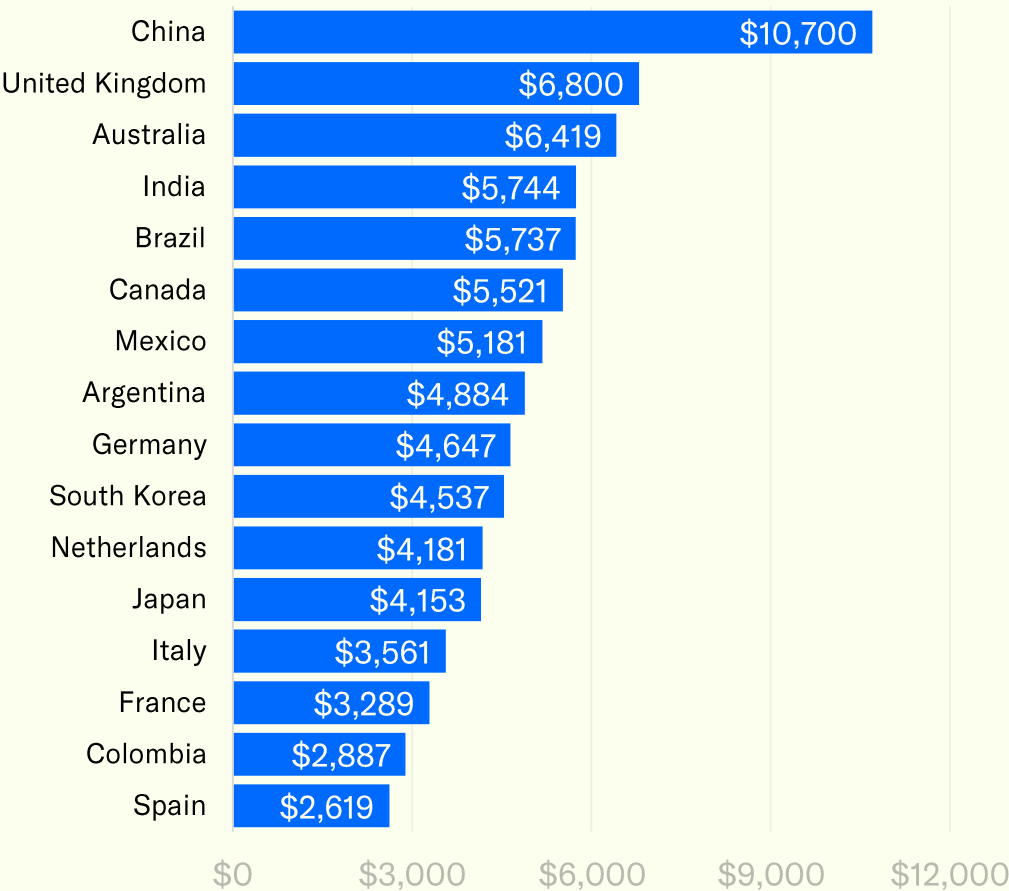
Days Available for International Travel

(Avg. expected # of days available for international travel in upcoming year)

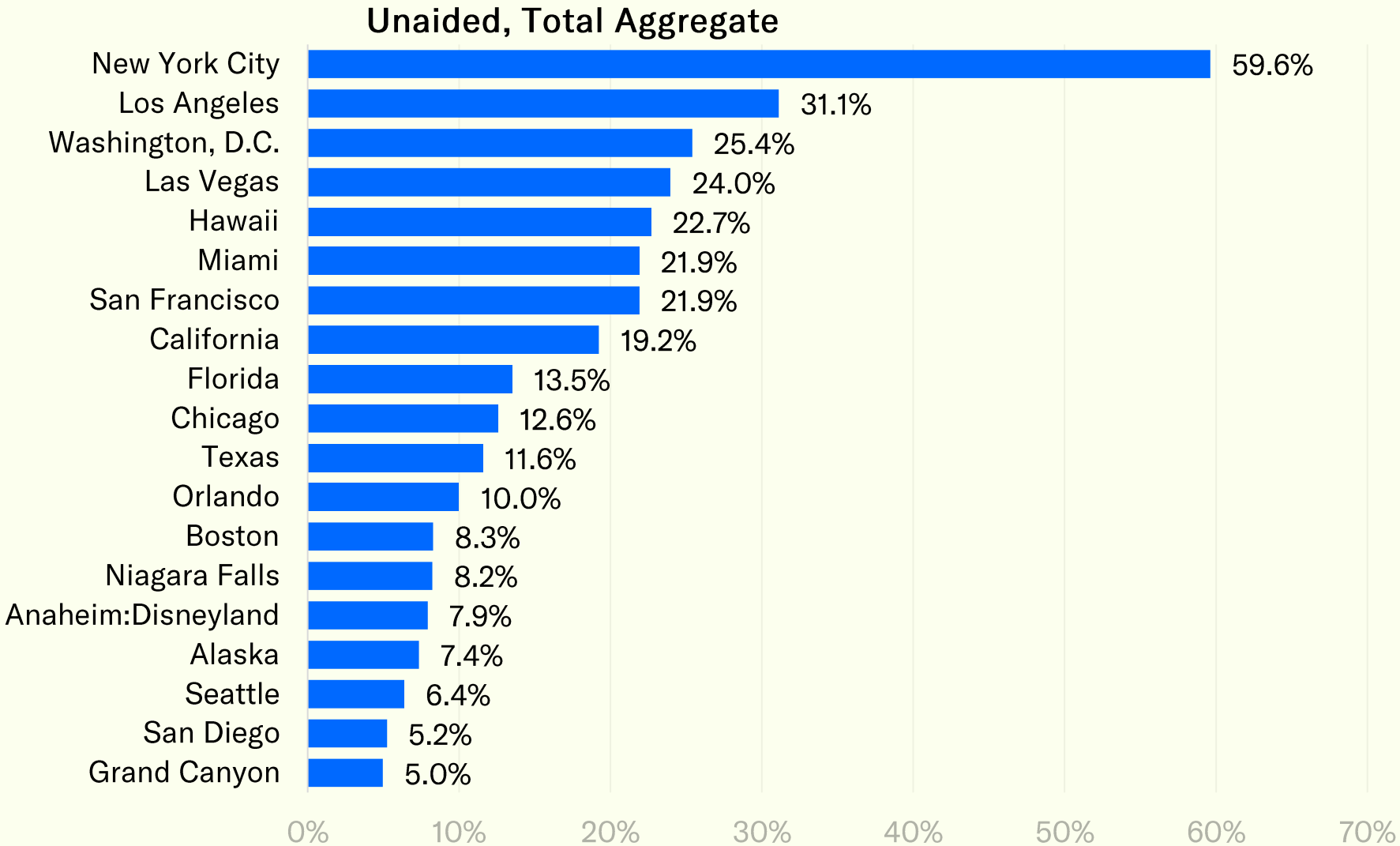


Annual International Travel Budget

(Avg. maximum spending on int'l travel in upcoming year)



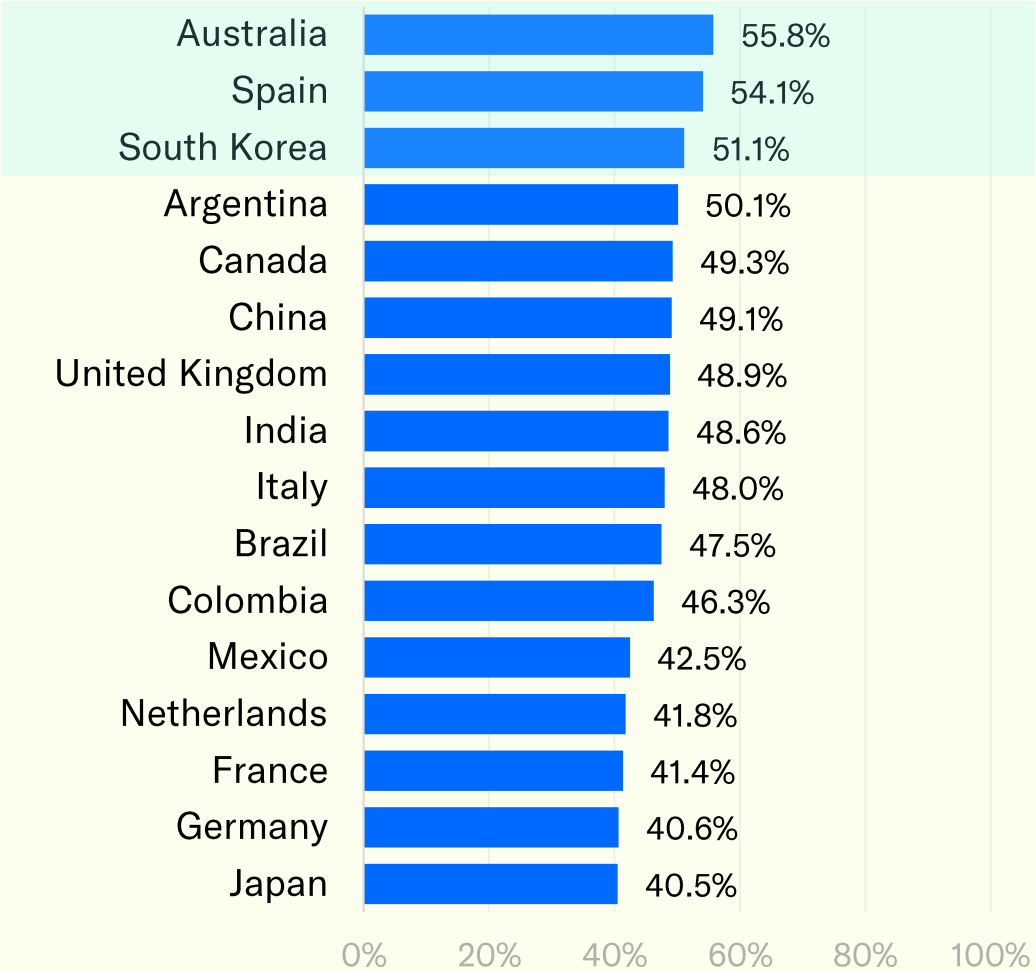
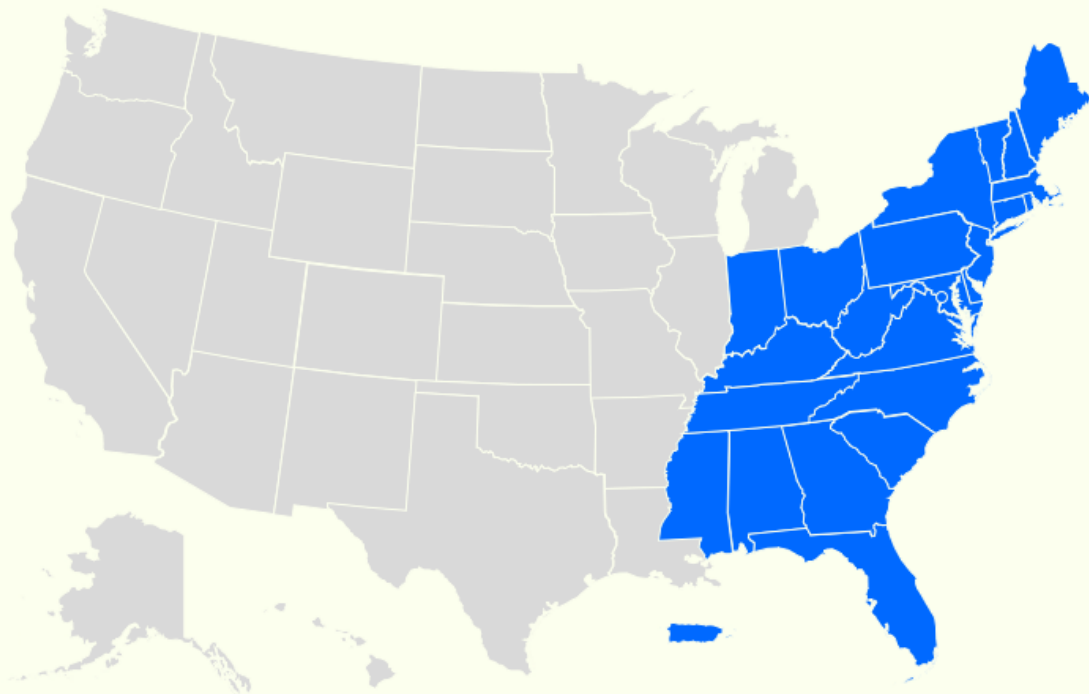
NYC, LA, DC, Las Vegas and Hawaii are the Top 5 Most Desired U.S. Destinations Globally



The Eastern U.S. is Most Appealing to International Travelers in Australia, Spain, South Korea and Argentina

By Market – % Interest in Visiting the Eastern U.S.

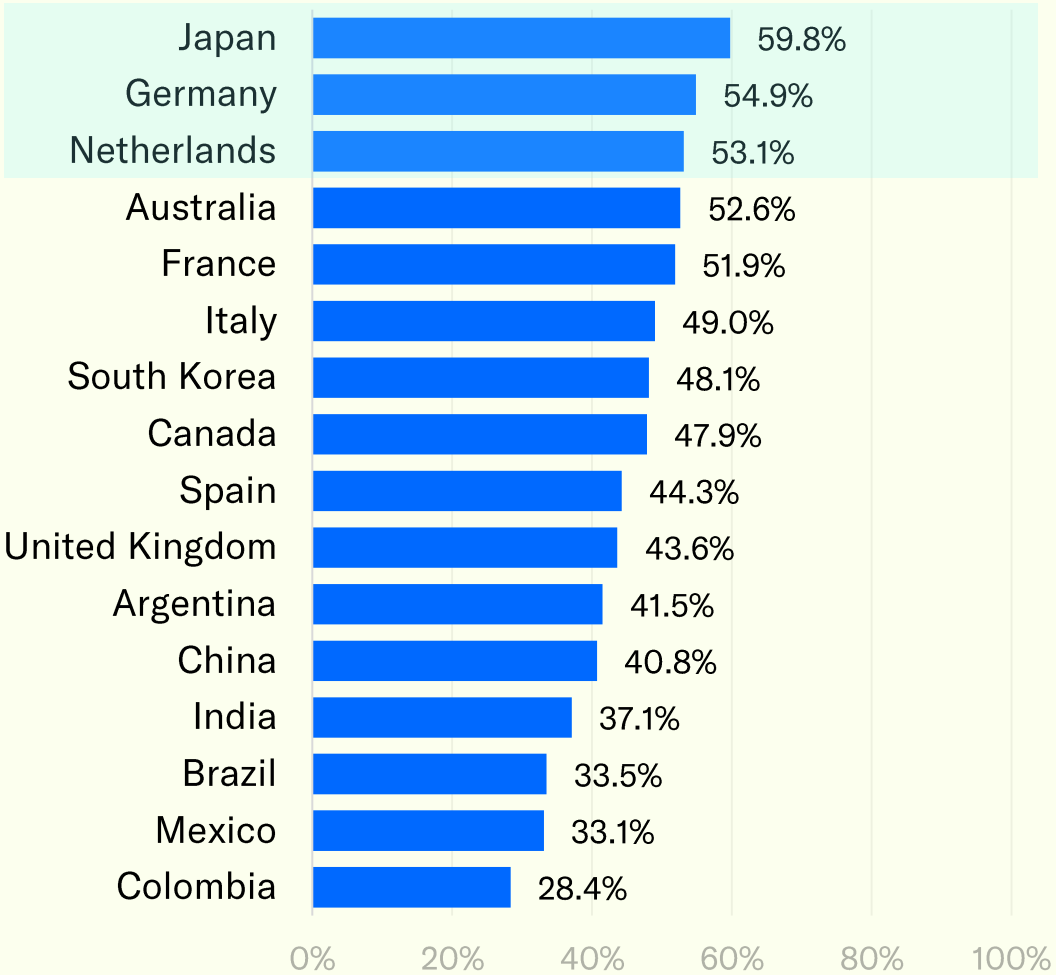
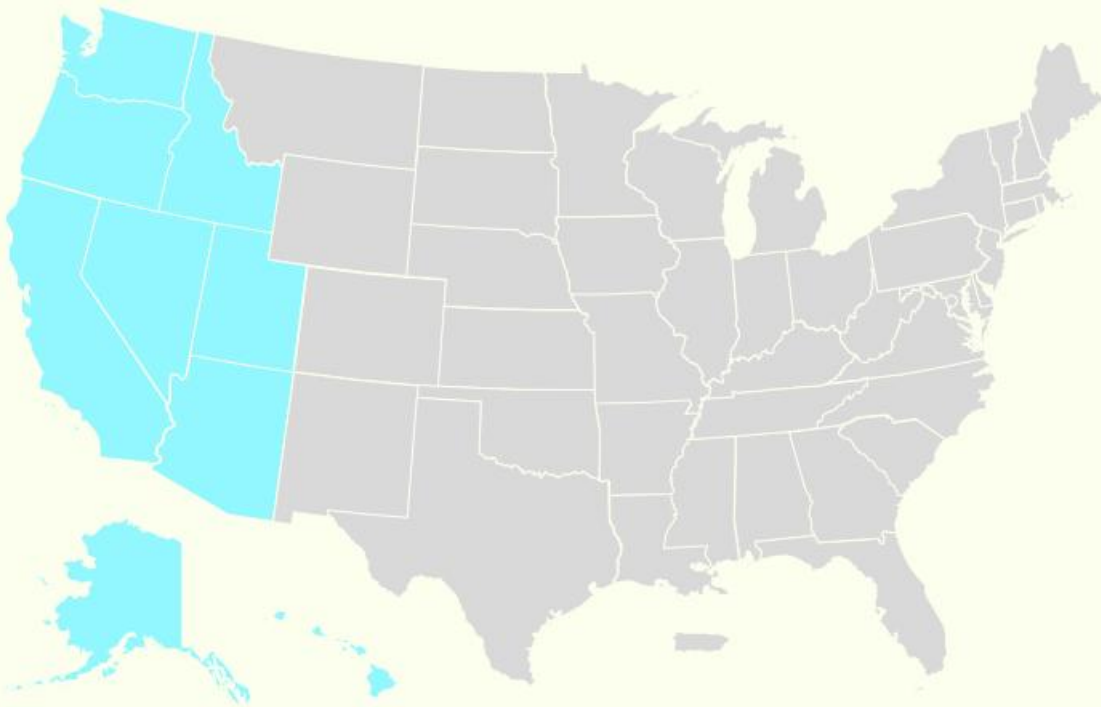
Eastern U.S.



The Western U.S. is of Most Interest to International Travelers in Japan, Germany, the Netherlands, Australia and France

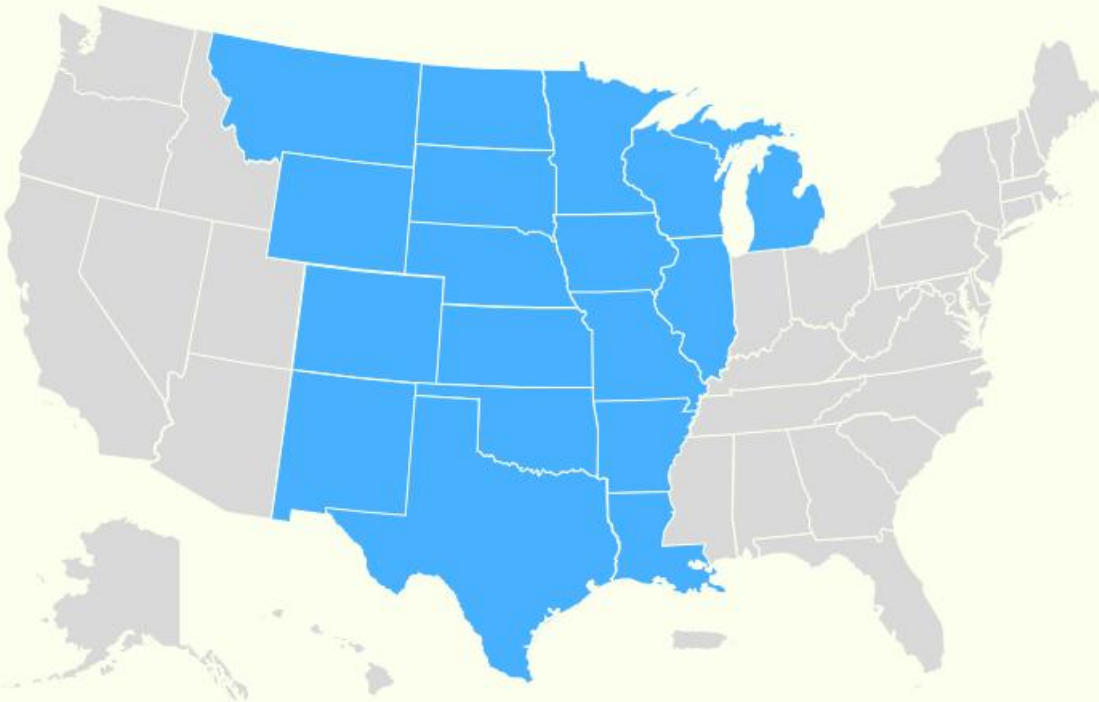
By Market – % Interest in Visiting
the Western U.S.

Western U.S.

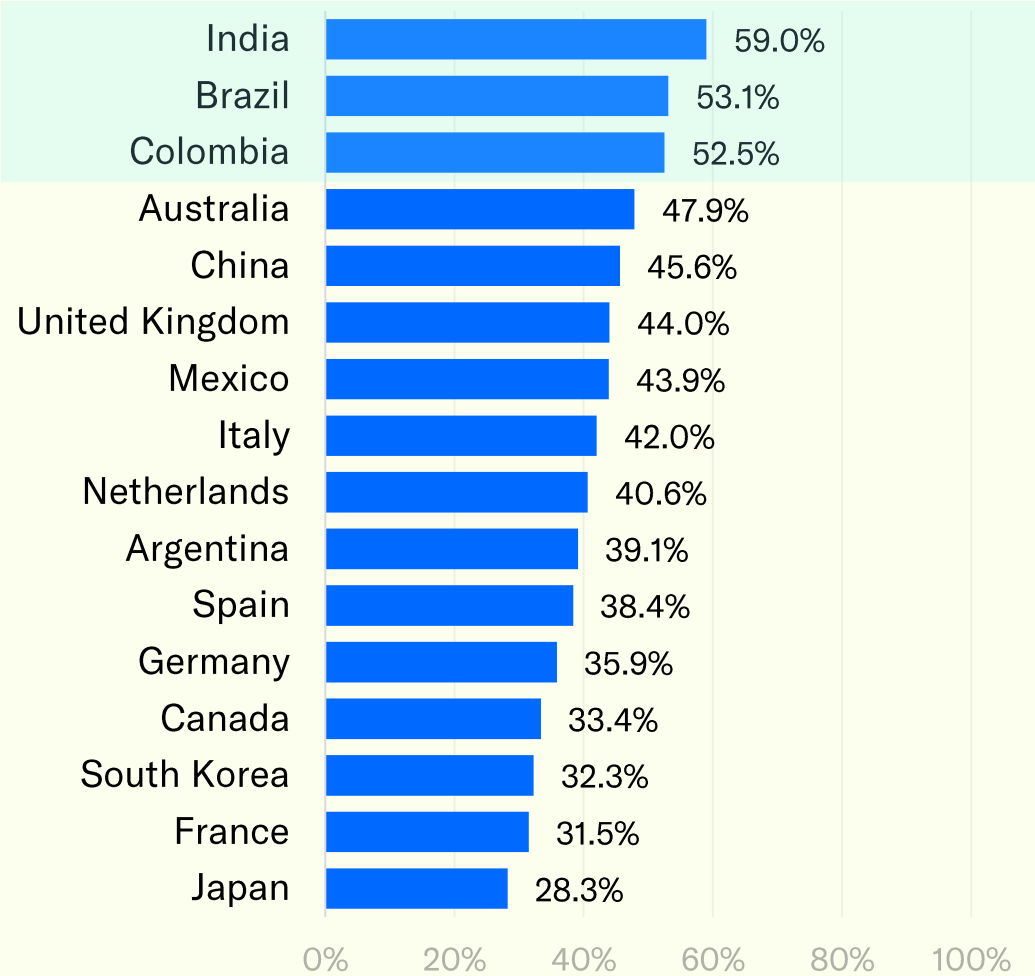


The Central U.S. is of Most Interest to International Travelers in India, Brazil and Columbia

Central U.S.

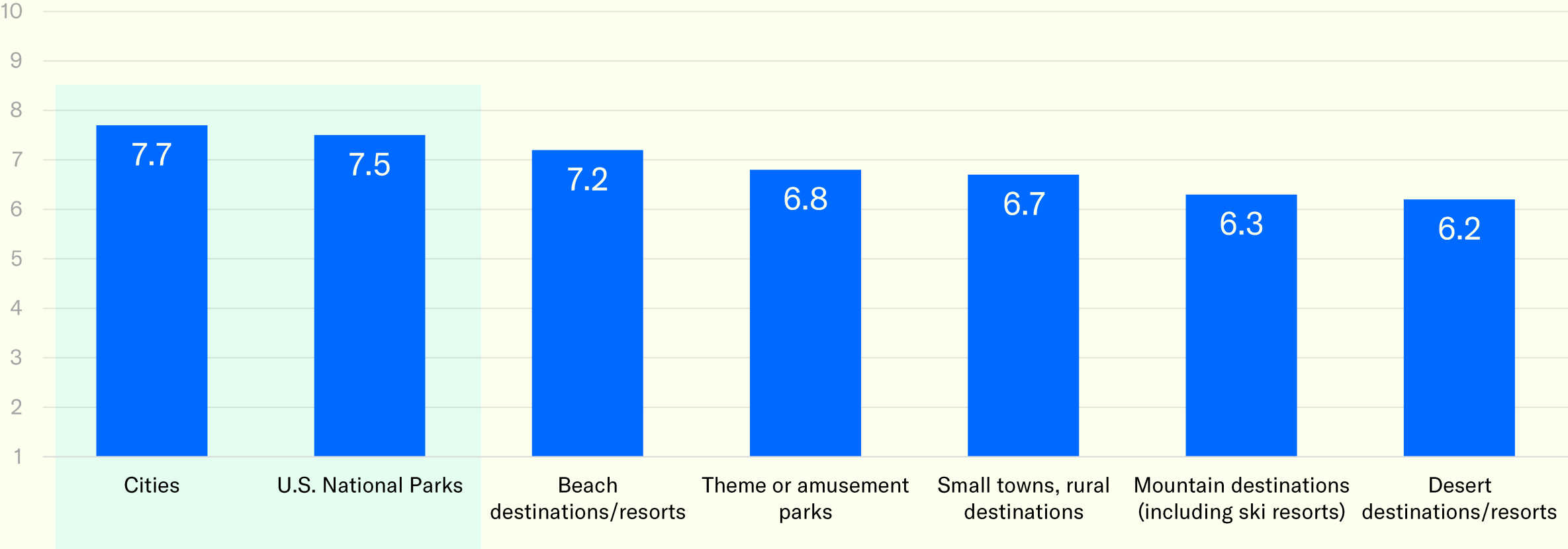


By Market – % Interest in Visiting the Central U.S.



American Cities, National Parks and Beach Destinations Generate the Most Excitement

Destination Types Most Excited to Visit
Average Excitement Score on a Scale of 1 to 10



Inspiration and Travel Planning Trends

Important Factors in International Destination Decisions: Make it Easy

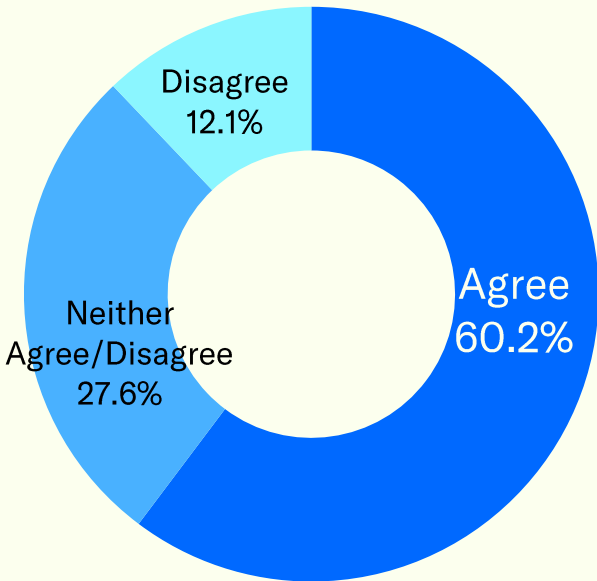
% “Important” or “Very Important”

Trip Cost	85.6%
Convenience of planning	81.2%
Ease of obtaining a visa	77.8%
Welcoming environment to people of diverse identities	74.8%
Cultural diversity in the local population of the country	63.6%
Cultural diversity in the tourists that visit the country	60.8%
Sustainability and carbon footprint	54.7%
Trendy—being a “hot” place to go at the moment	43.4%

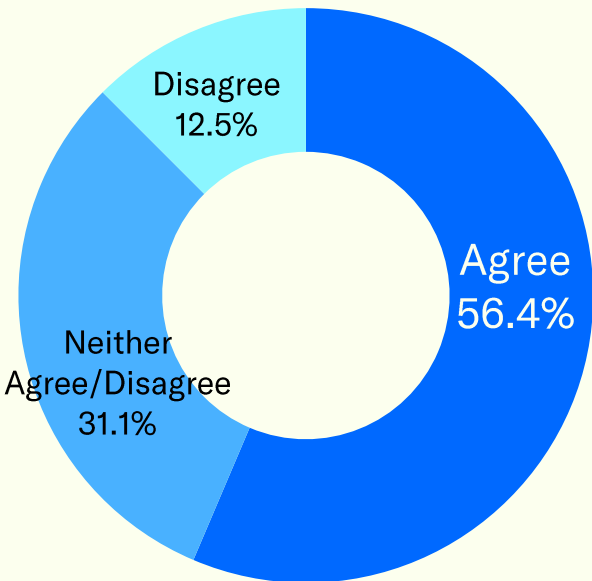


Environmental Concerns are Impacting Decisions

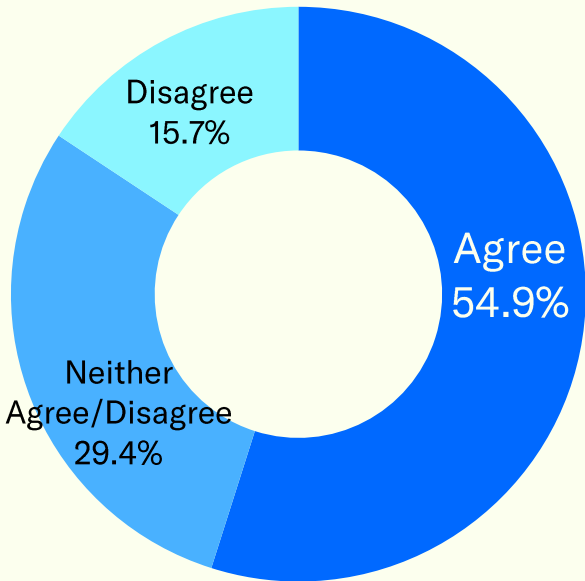
With higher temperatures each year, travelers will try to seek out cooler places.



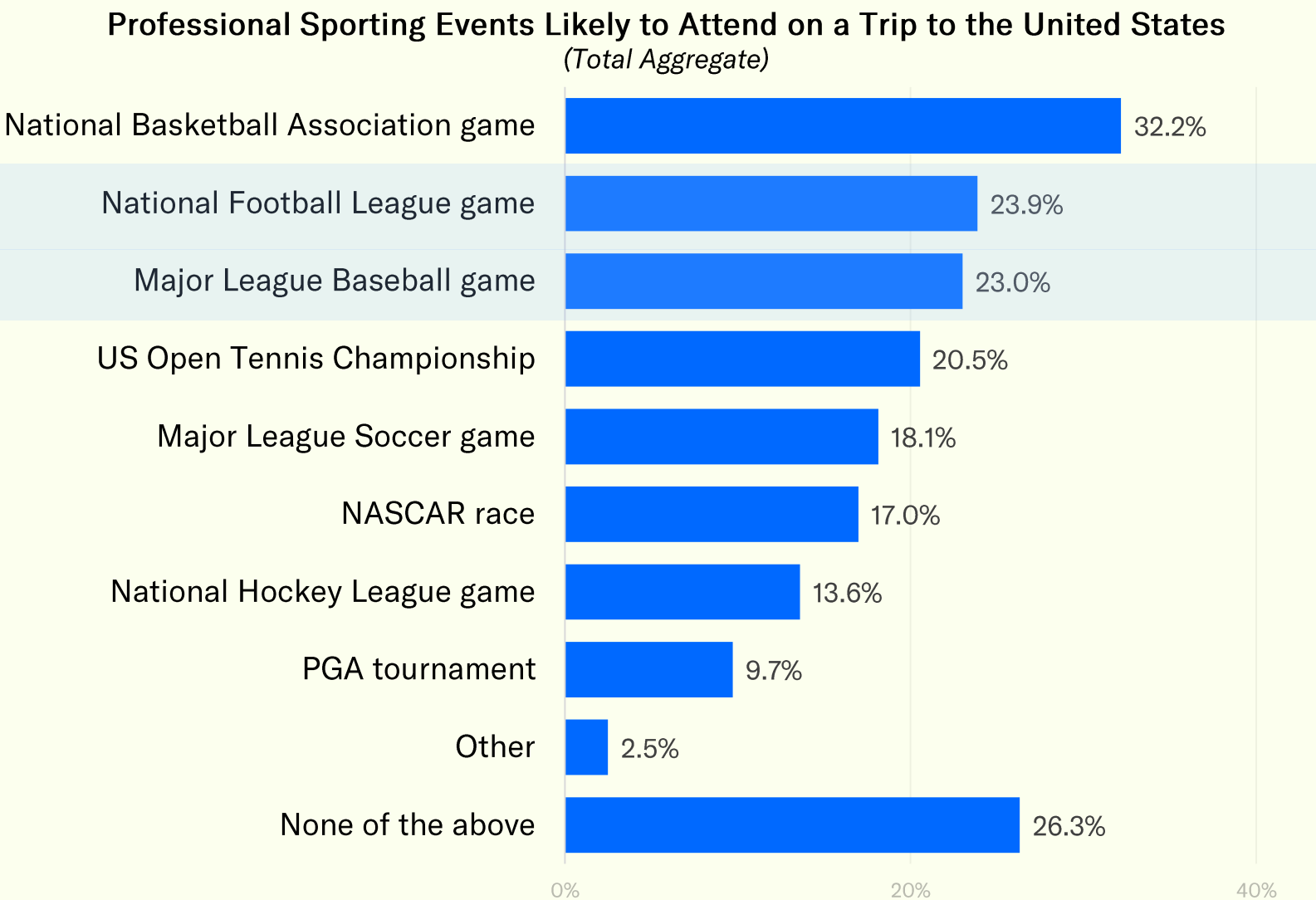
I'll be more proactive in reducing the impact of my travel on the environment.



Climate change will have a significant impact on my leisure travel in the next 5 years.



Professional Sporting Events Drive Interest



Likely to Attend an NFL Game



47.1%



20.0%



20.0%

Likely to Attend an MLB Game



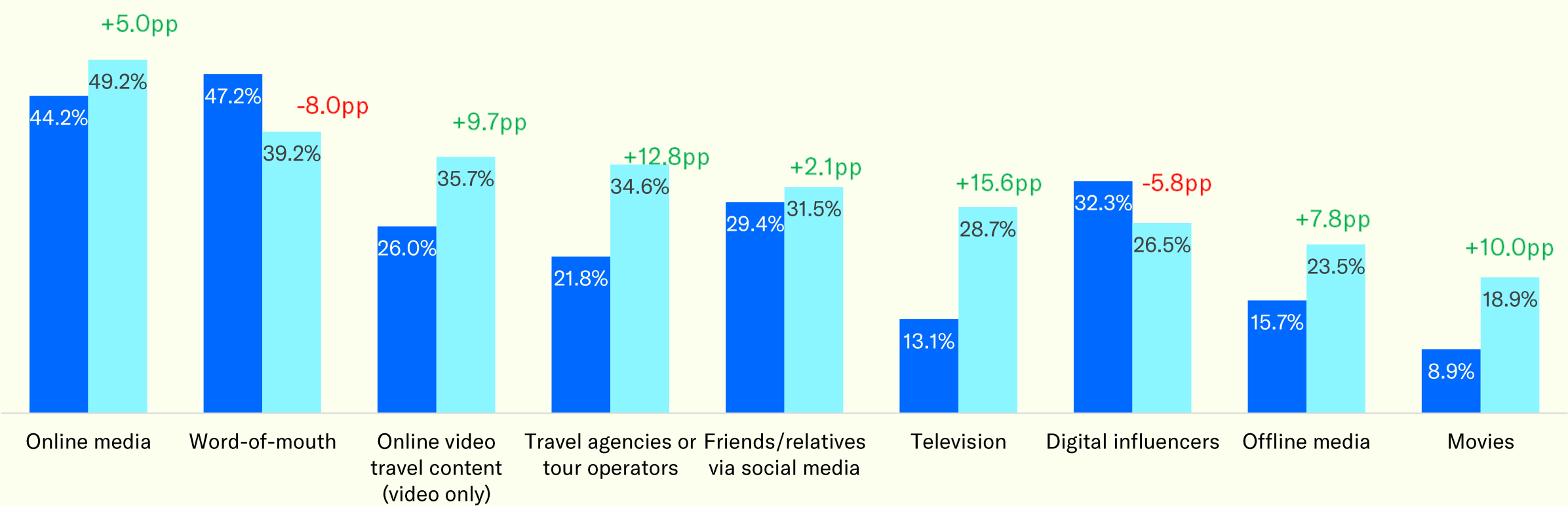
59.4%



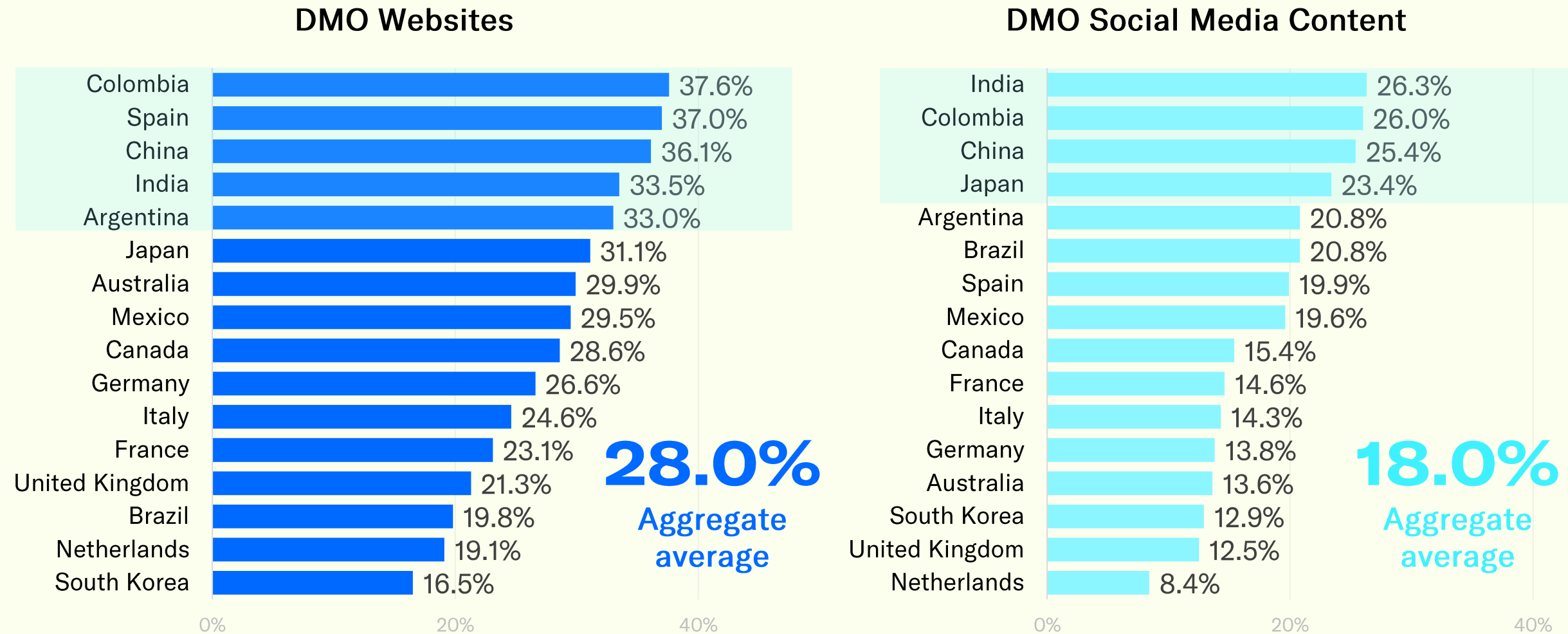
50.4%

Online Content Surpasses Word-of-Mouth as the Top Source of Destination Inspiration

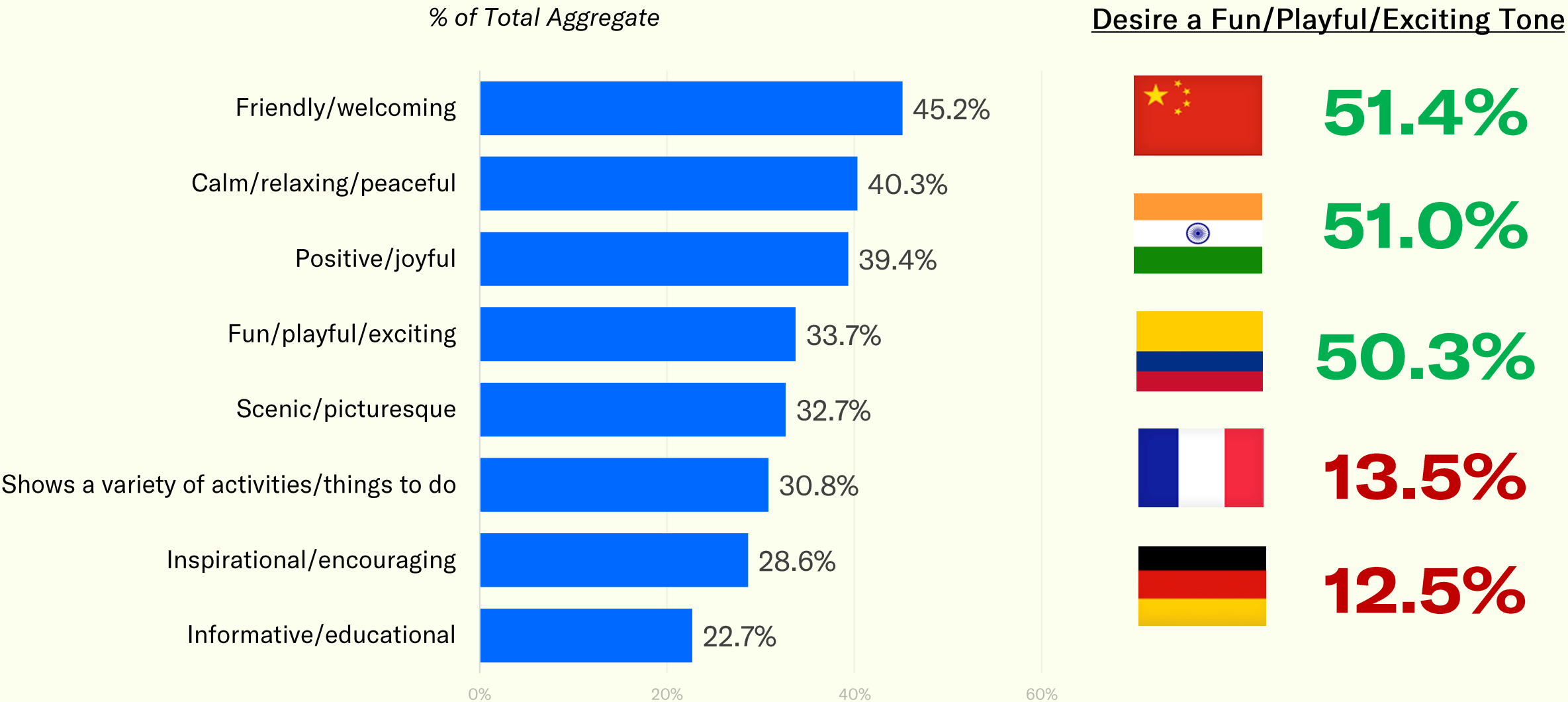
Sources Use for Destination Inspiration – Change Compared to Last Year
(% of Total Aggregate)



DMOs' Digital Content is an Important Trip Planning Resource for International Travelers



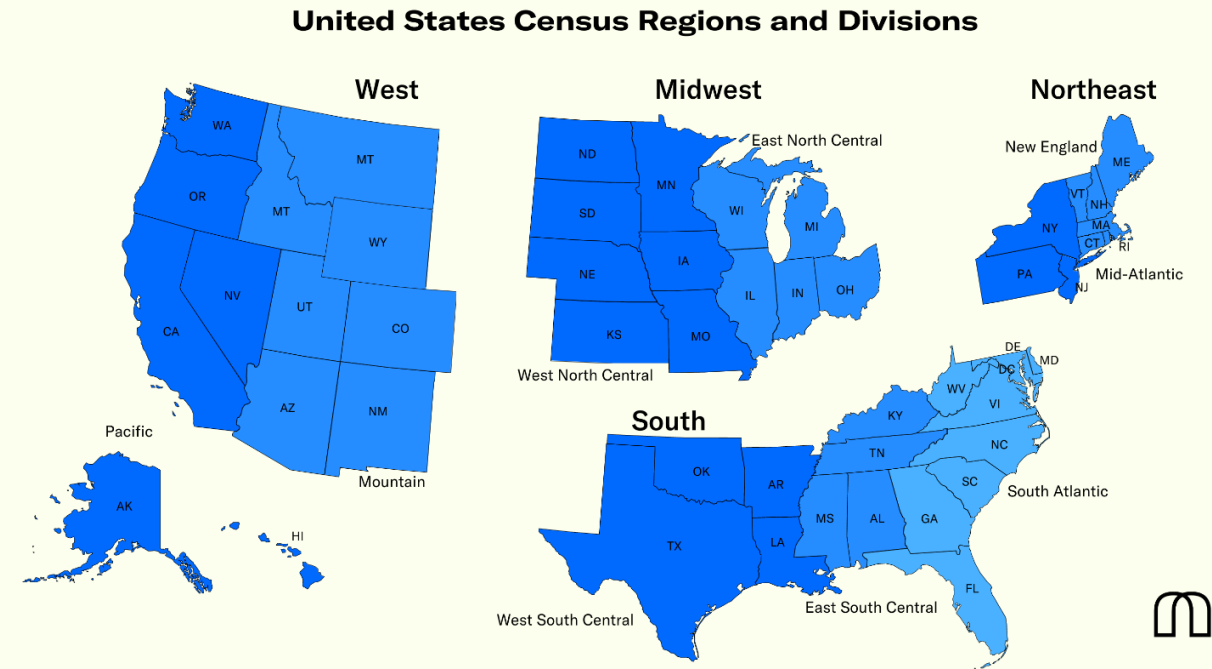
Desired Tones for International Destination Ads



American Travel Sentiment

The State of the American Traveler

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [December 15-26](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.55%
- Data is weighted to reflect the actual population of each region



Traveler Sentiment

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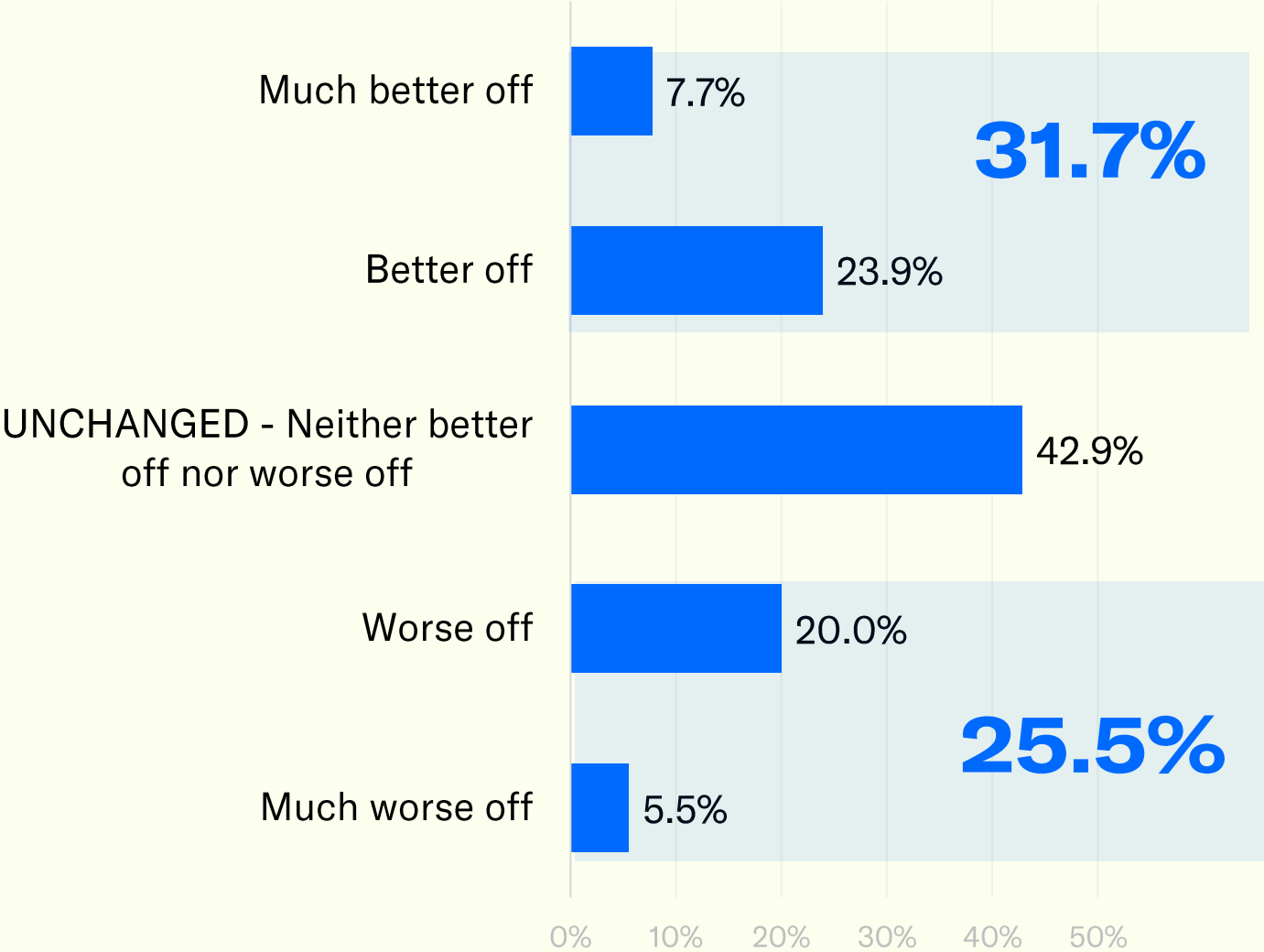


**The year is beginning
with a healthy dose of
traveler positivity.**

Travelers' feelings about their current finances improved this month.

Question:

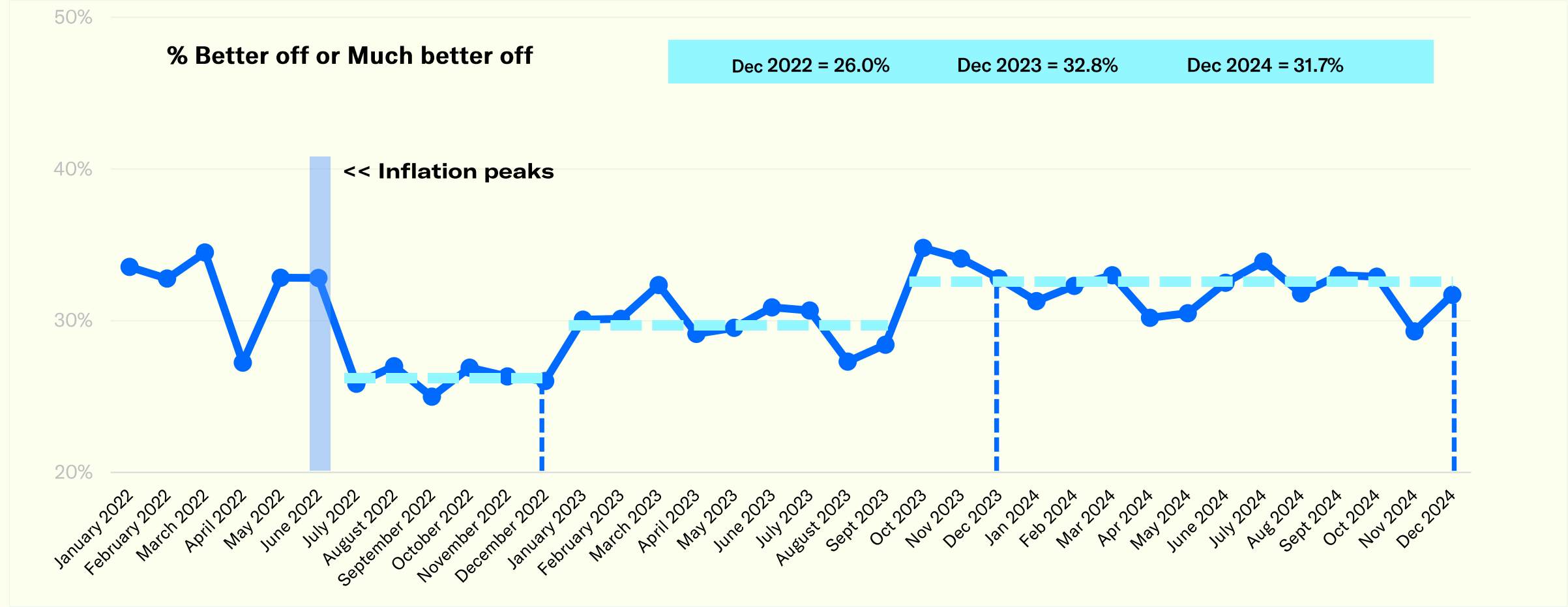
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



The proportion of travelers feeling “better off financially” bounced back to 32 percent this month.

Question:

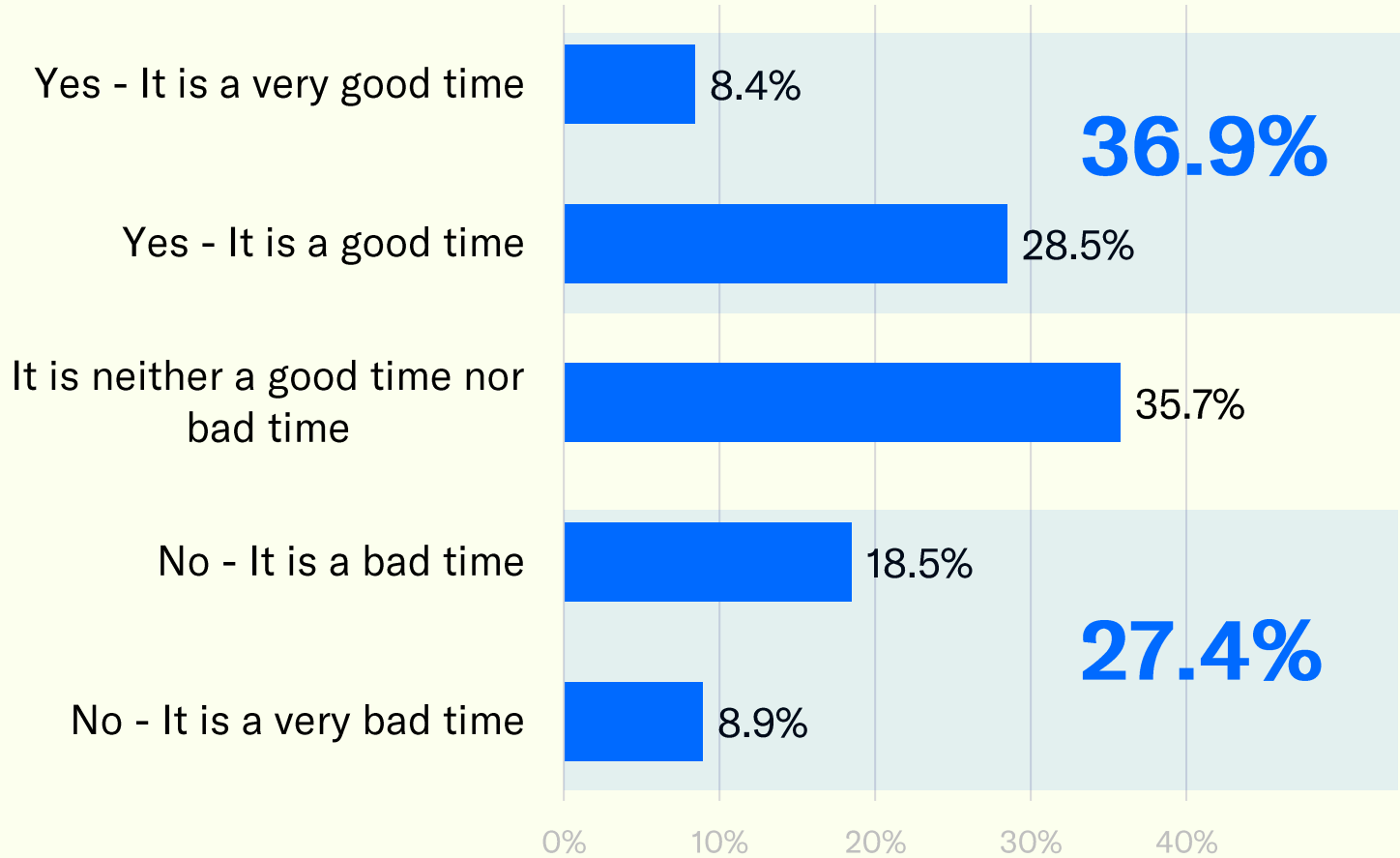
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



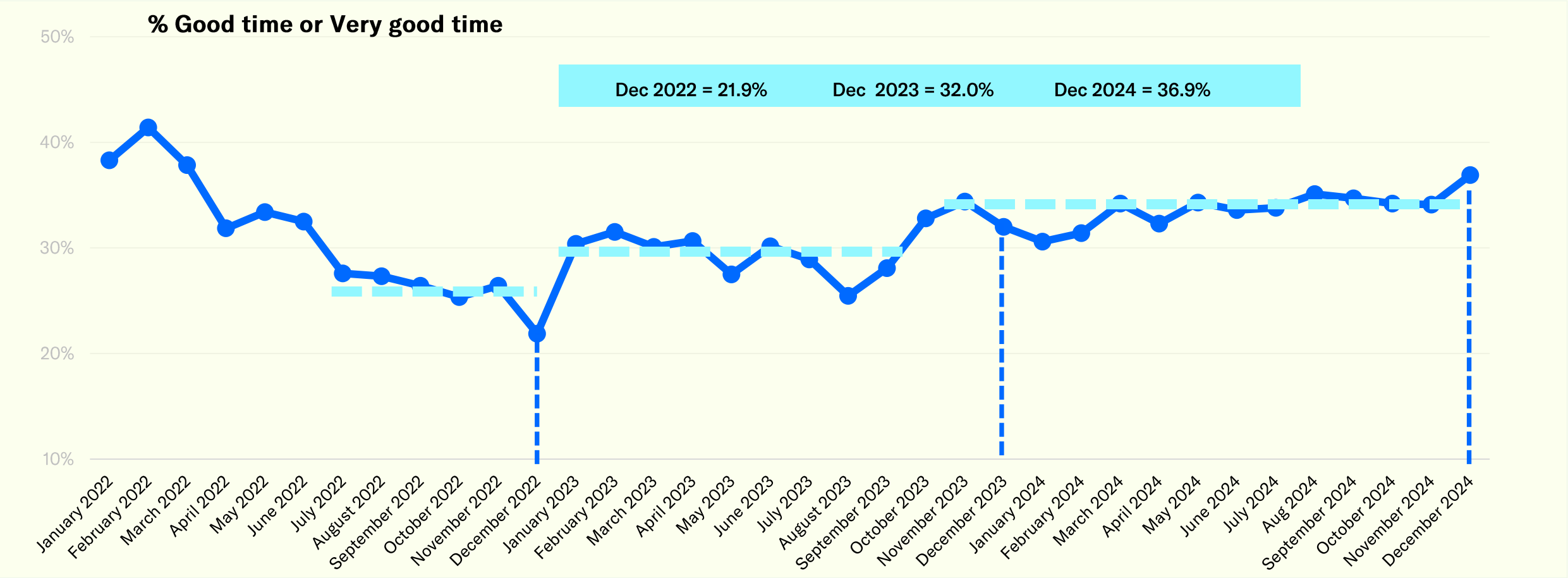
More than one-third of American travelers feel that now is a good time to spend on travel.

Question:

Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



This sentiment improved in the last month, reaching a 2-year high.



Looking Forward

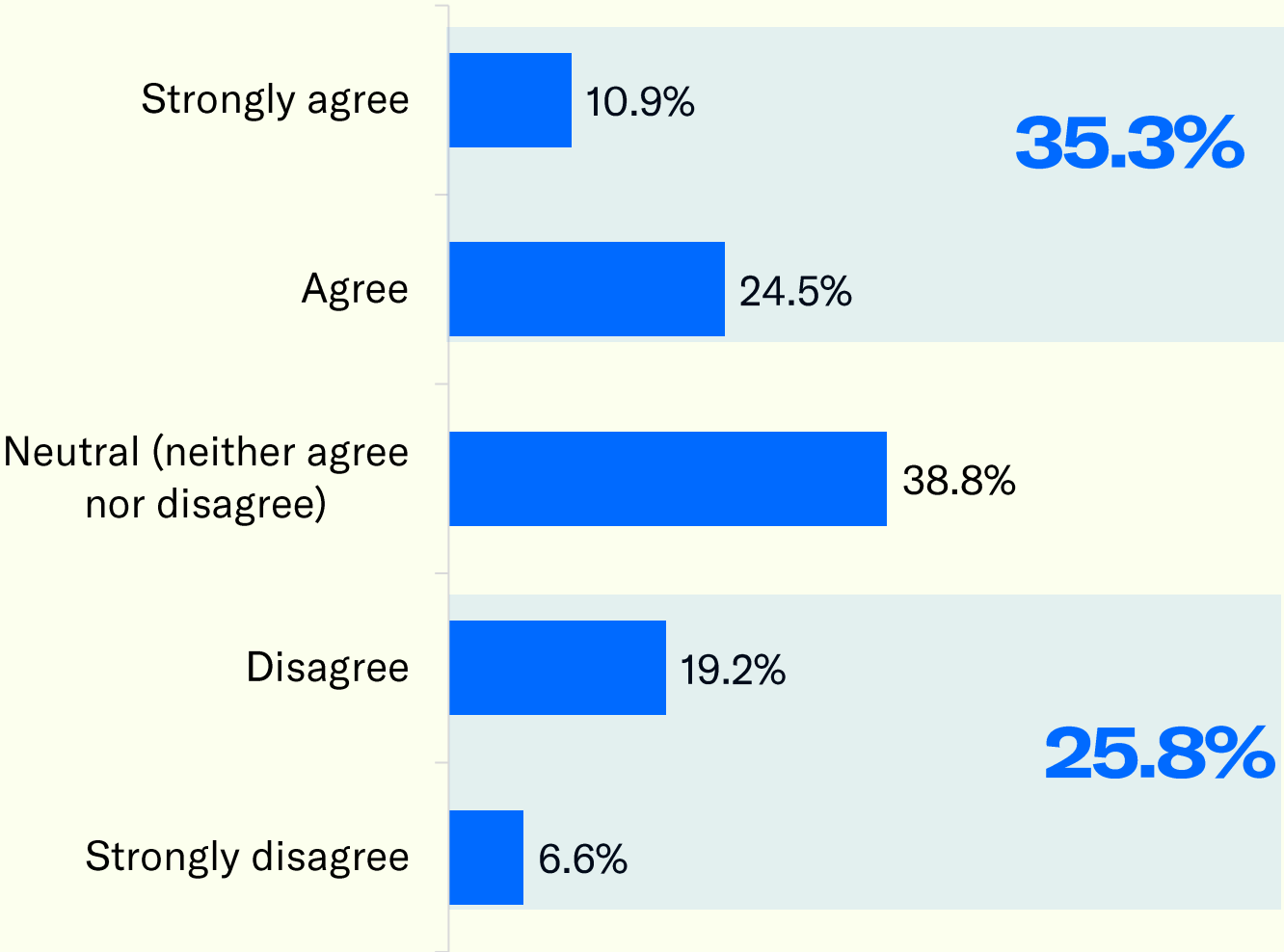
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Recessionary concerns have lessened. Now only about 1-in-3 travelers expect and impending recession.

Question:

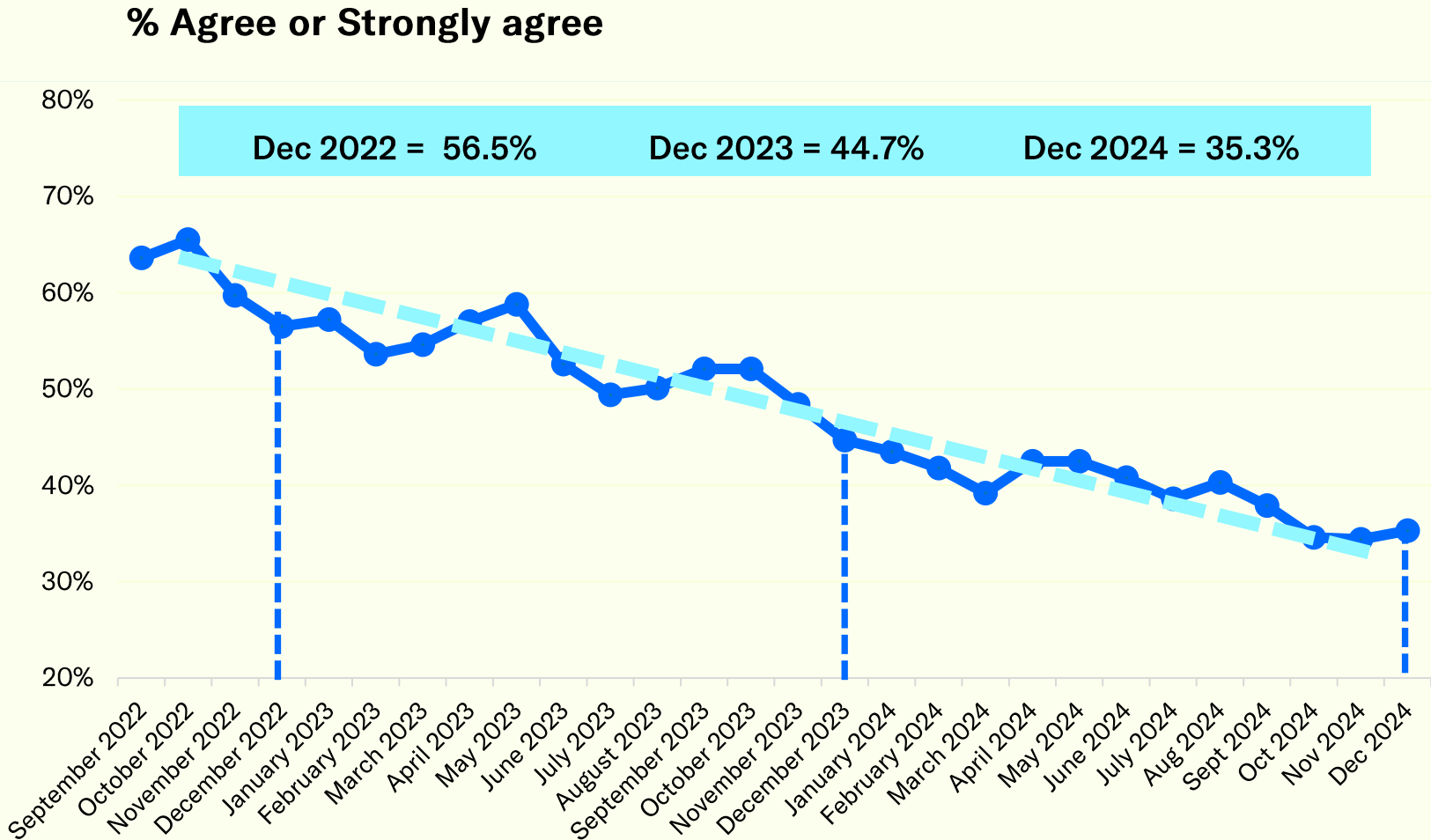
I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.



Concerns of an economic contraction are historically low for post-pandemic period.

Statement:

I expect the United States will enter an economic recession sometime in the NEXT SIX (6) MONTHS.

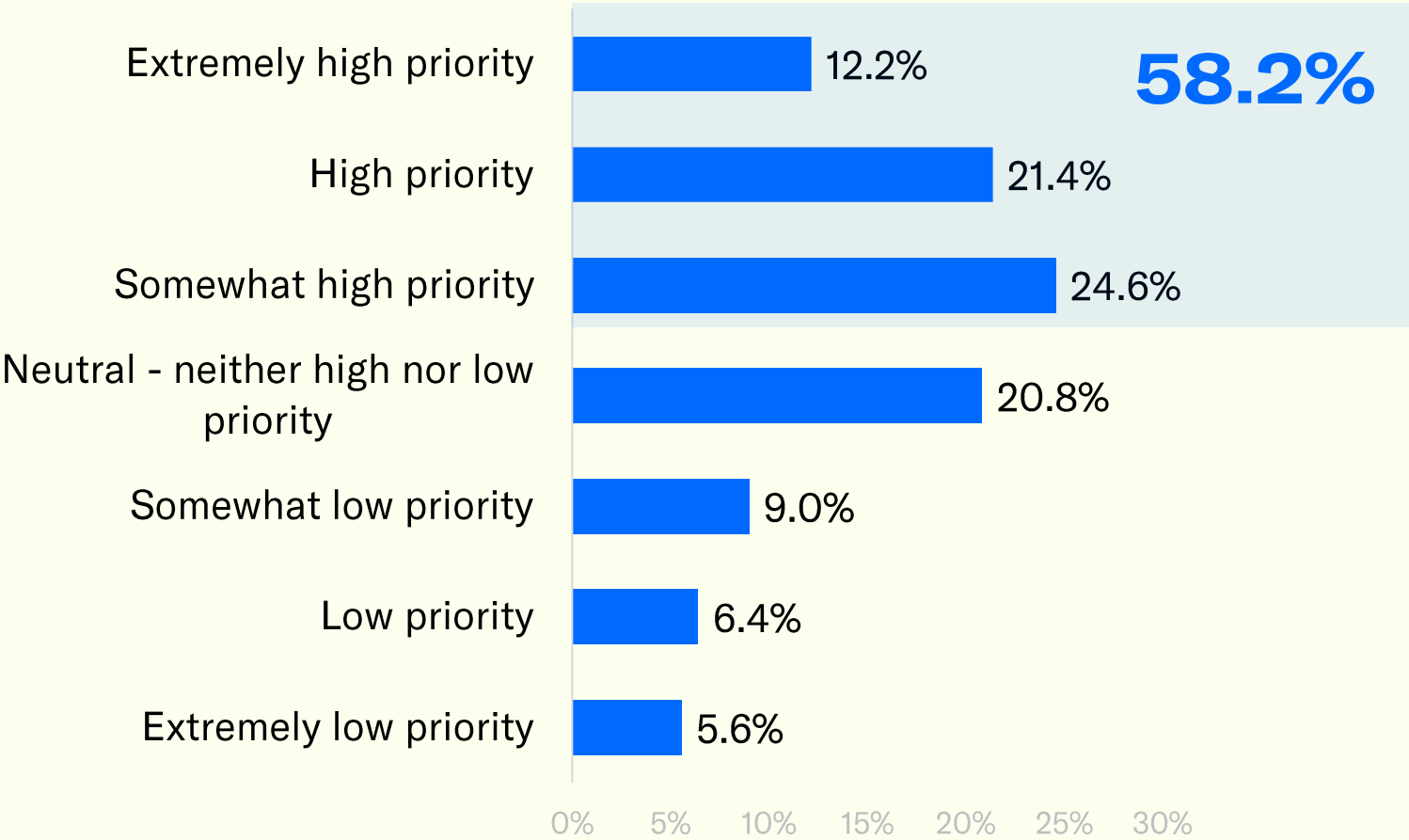


A majority of American travelers intend to make leisure travel a spending priority in the next three months.

Question:

Thinking carefully about how you expect to spend your income in the **NEXT THREE MONTHS**, please use the scale below to describe your spending priorities.

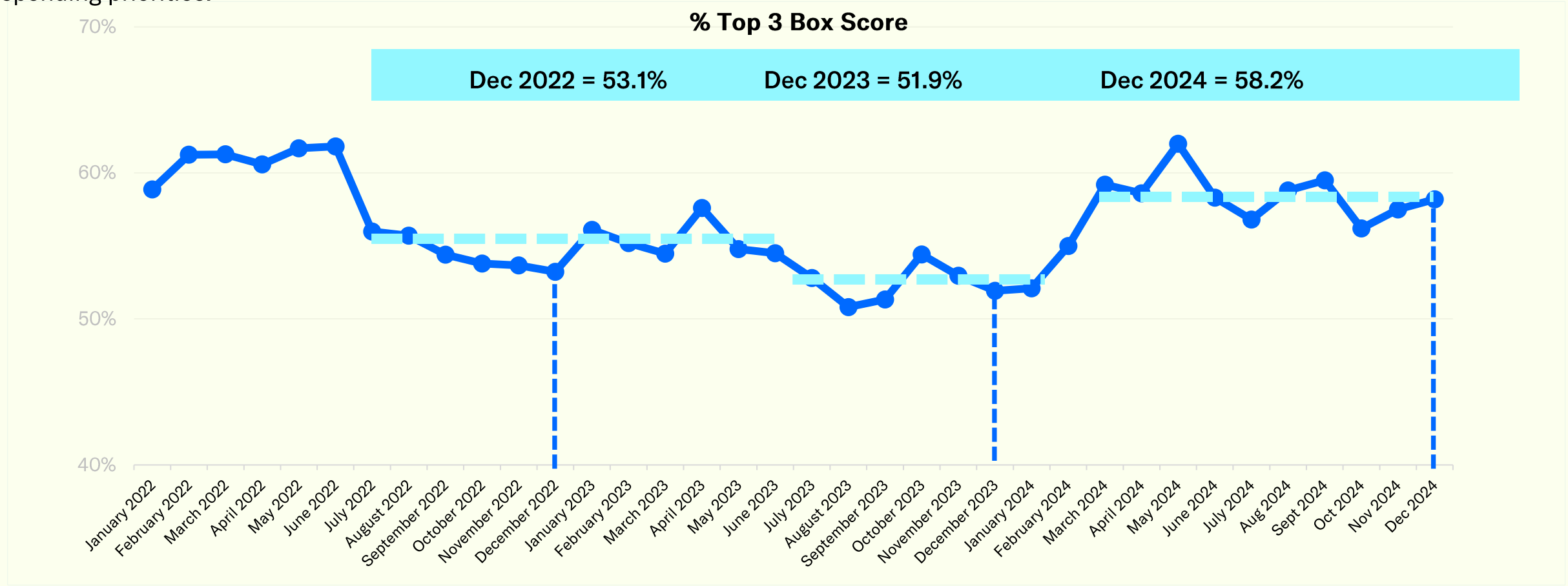
Leisure travel will be a(n) _____.



This metric has grown for two months and is above the last two years.

Question:

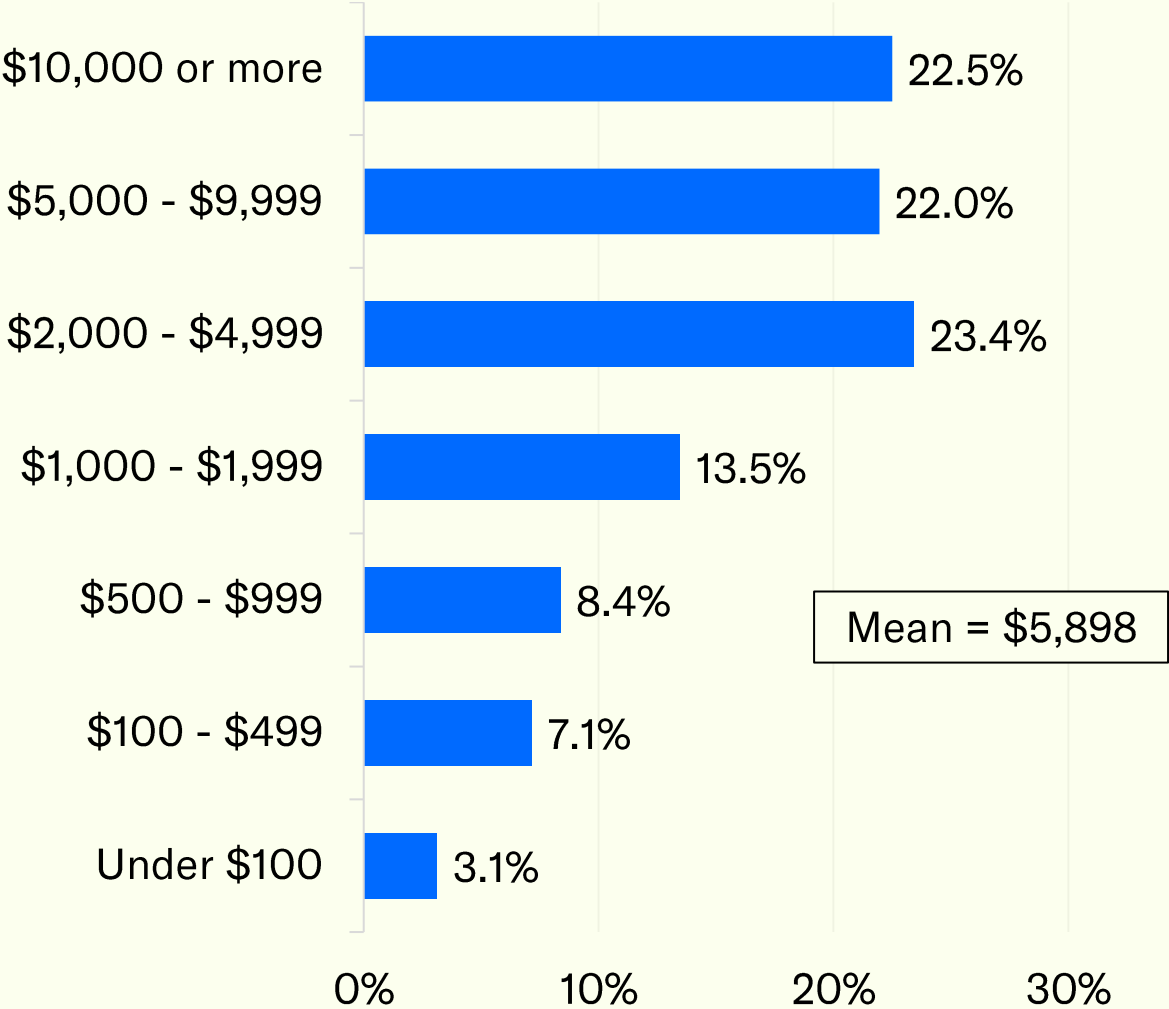
Thinking carefully about how you expect to spend your income in the NEXT THREE MONTHS, please use the scale below to describe your spending priorities.



Expected travel budgets were strong again this month.

Question:

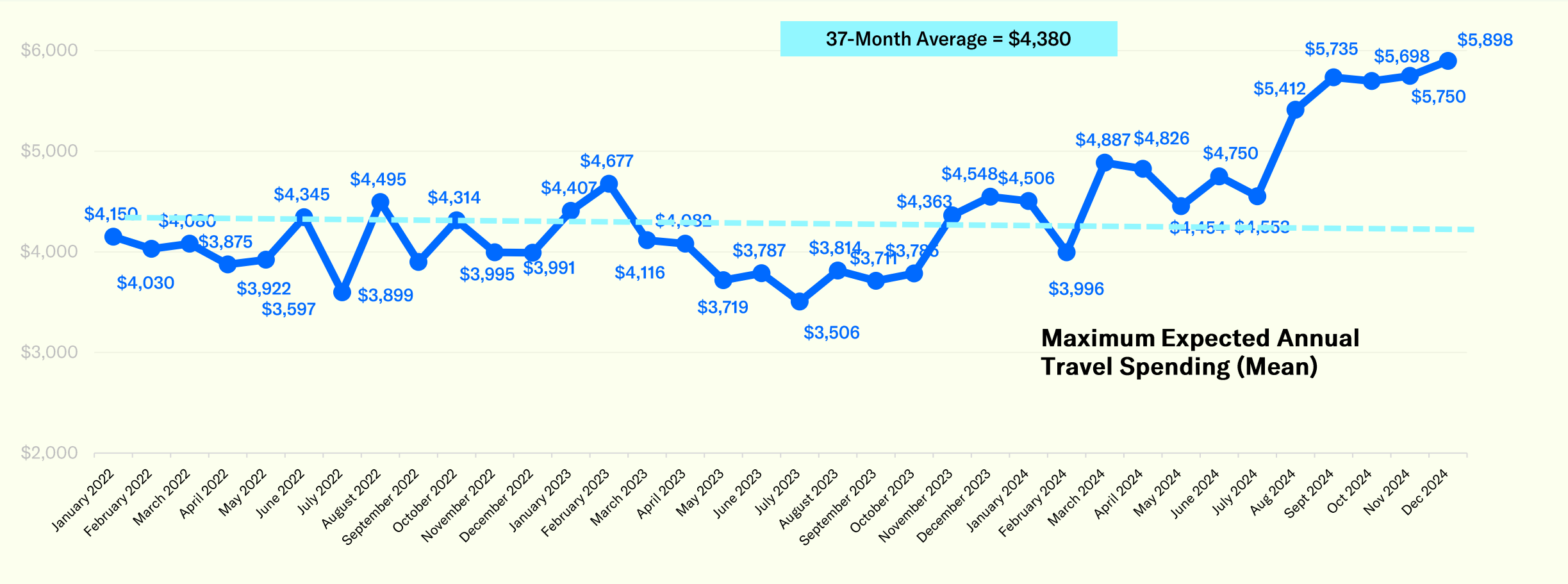
How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS?



Expected travel budgets continue to trend upward.

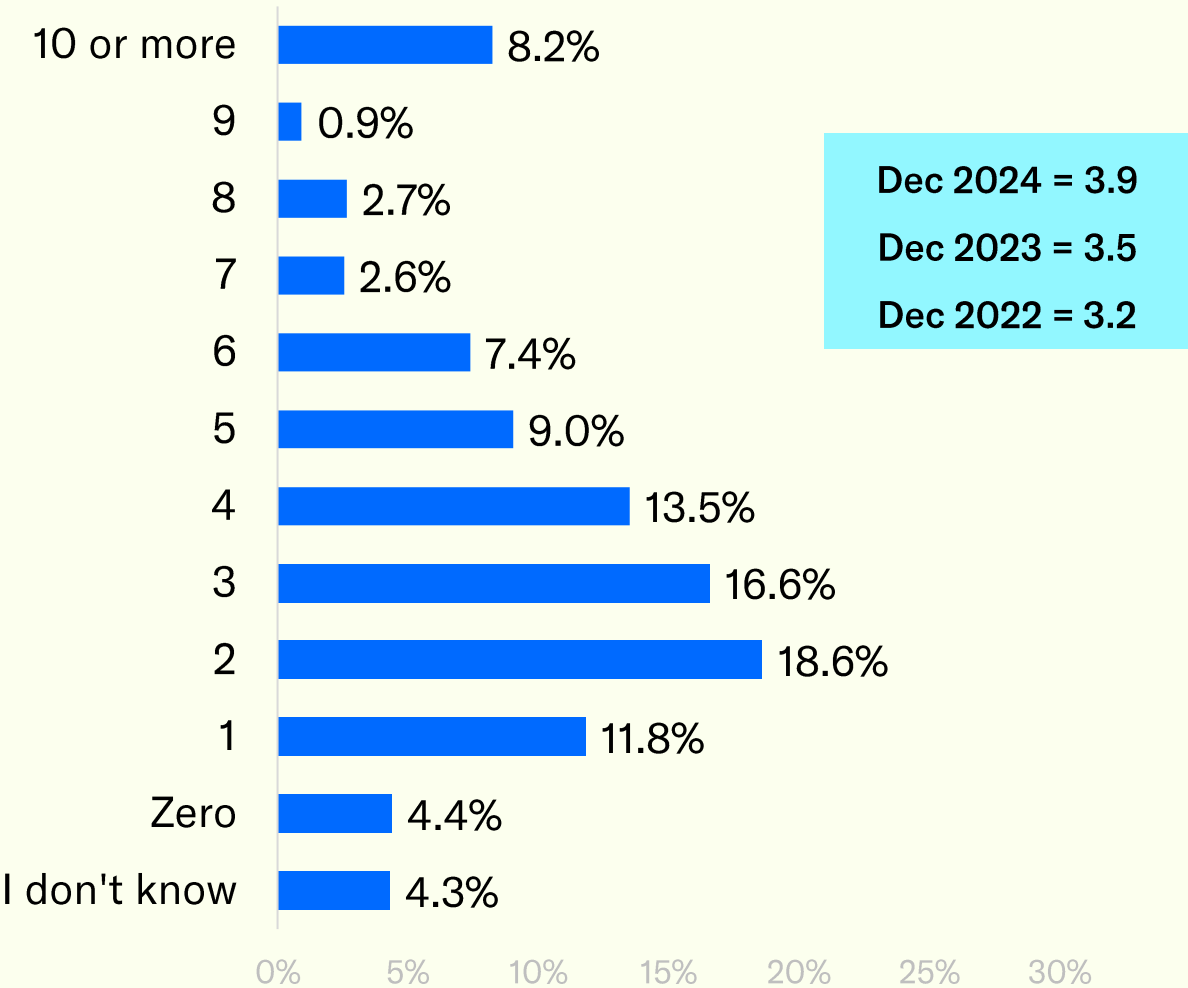
Question:

How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



The expected number of trips Americans plan to take has grown.

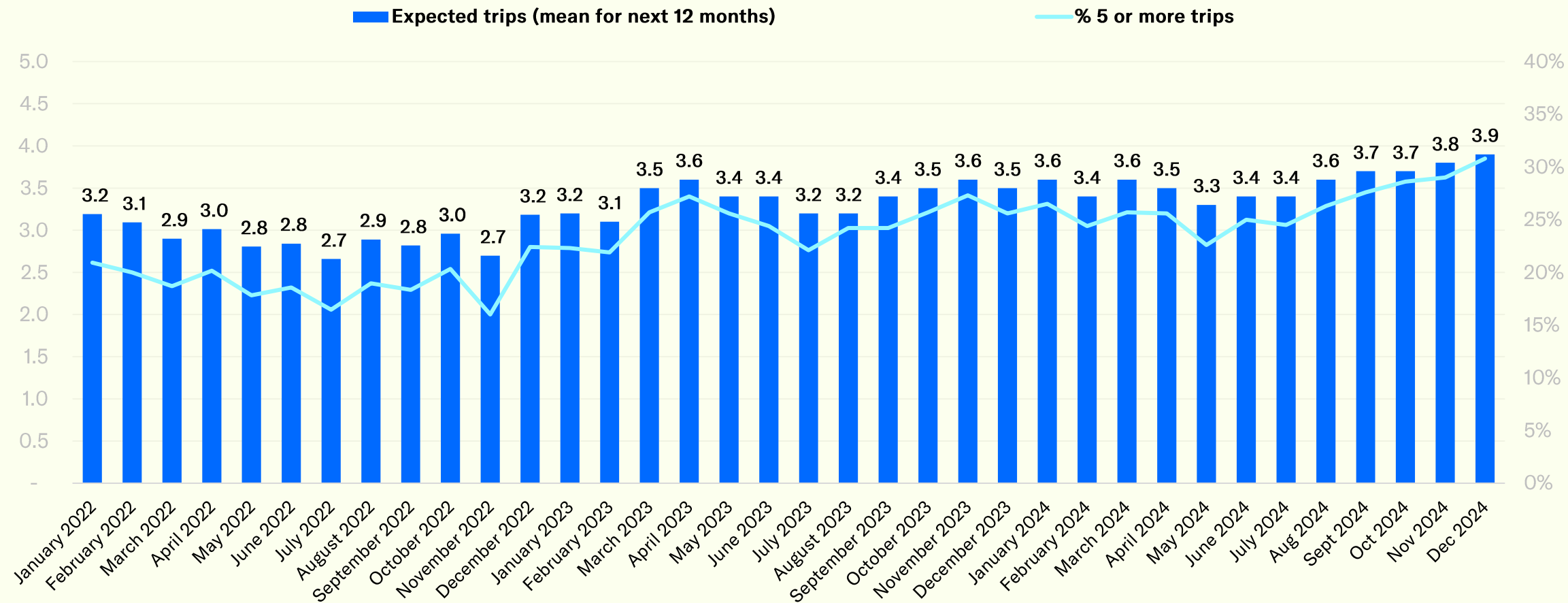
Question:
IN TOTAL, how many leisure trips
(of 50 miles or more from your
home) do you expect to take
in NEXT TWELVE (12) MONTHS?



Travel expectations are also at record high levels.

Question:

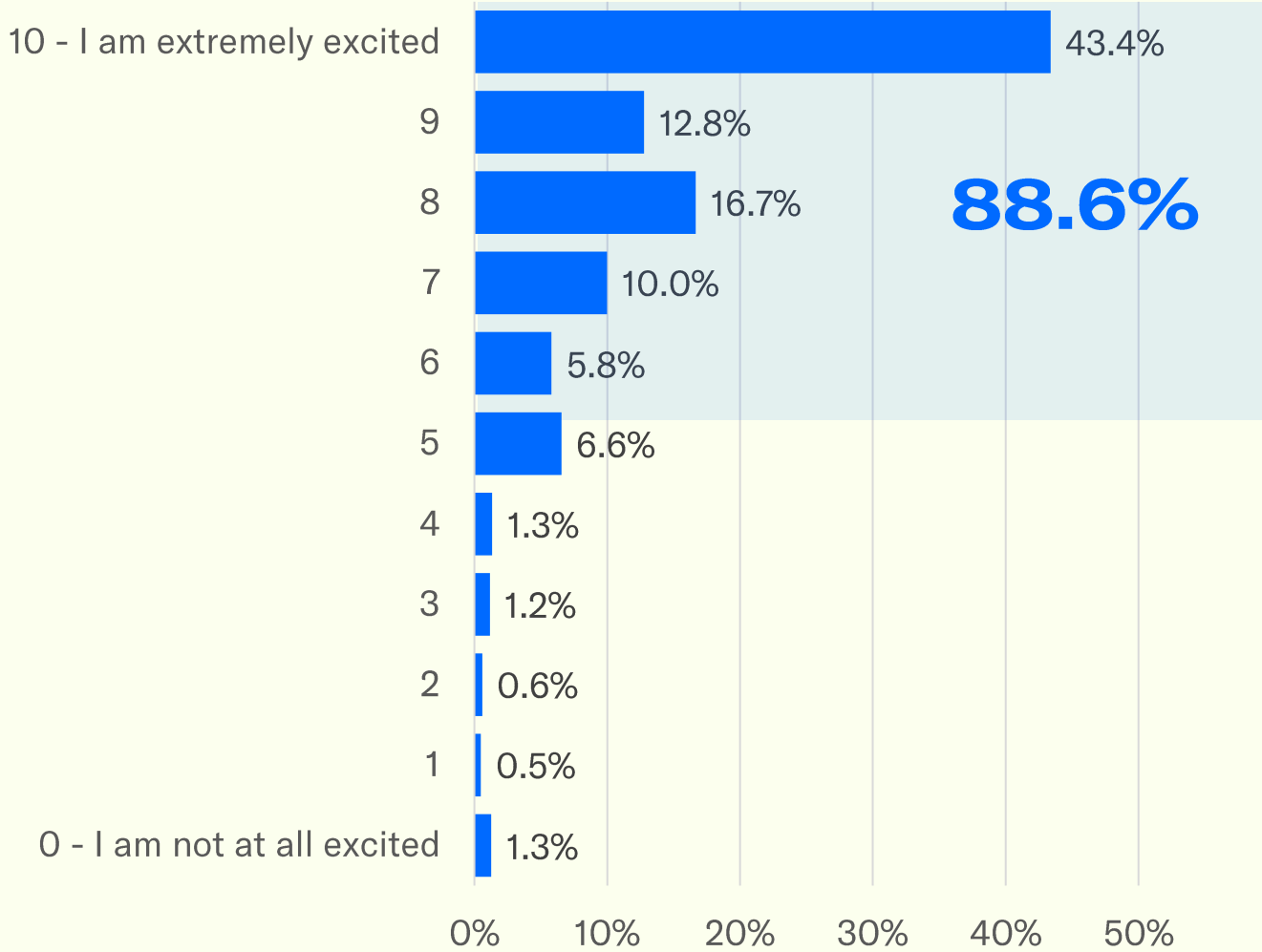
IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?



Energized: Nearly 90% of American travelers register high excitement levels for travel

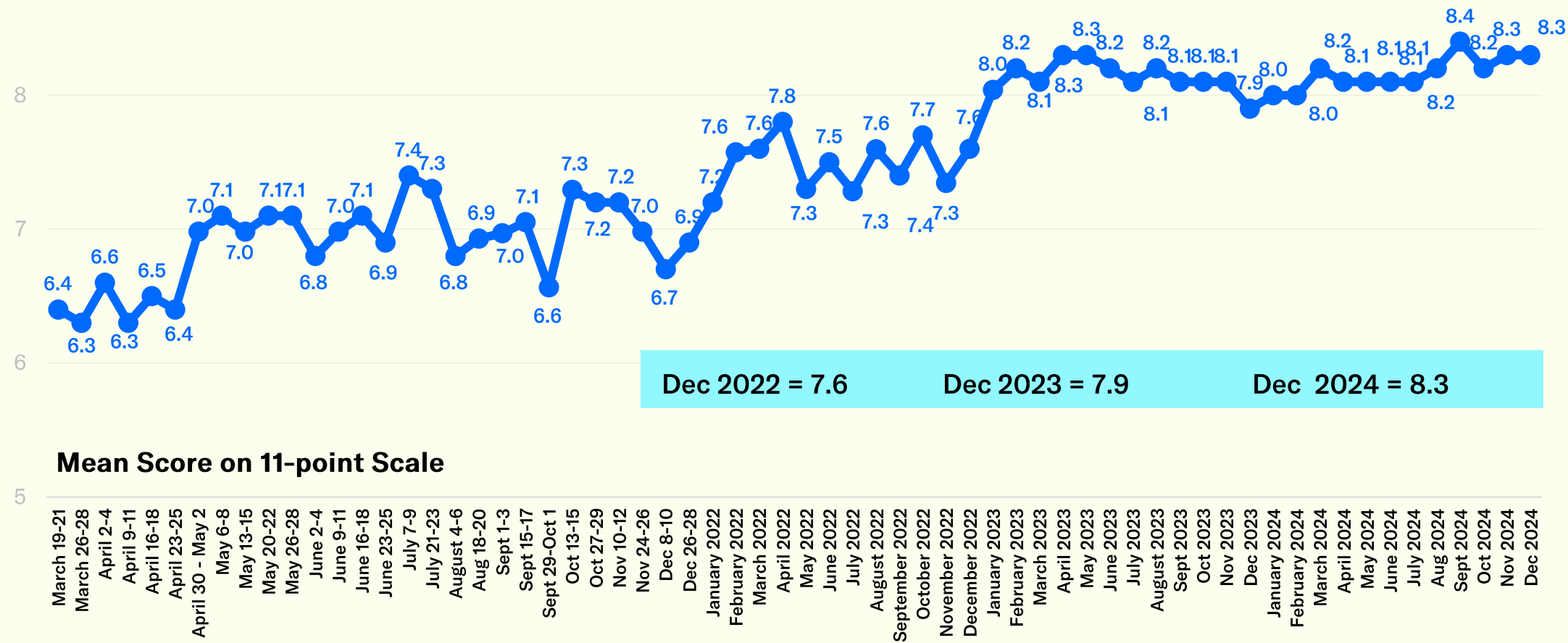
Question:

Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS? (Please answer using the 11-point scale below)



Excitement for travel remains at record levels.

Question:
Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



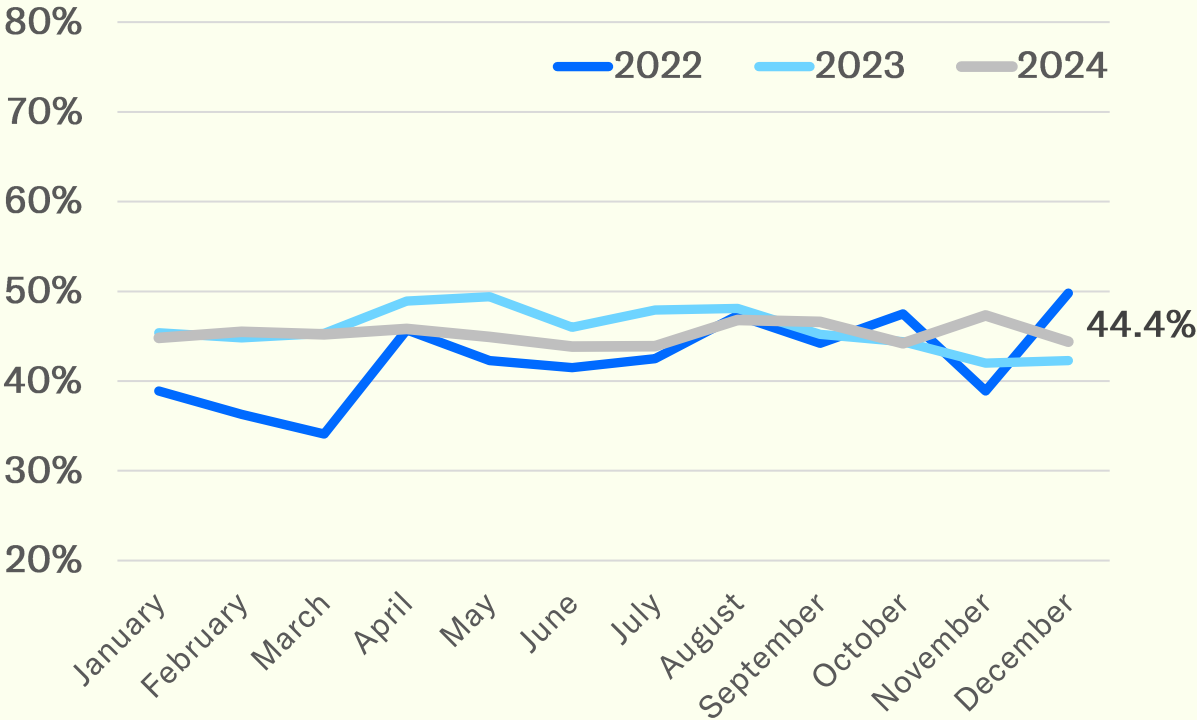
Recent Travel Planning Behaviors

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Day dreaming about travel is a national pastime.

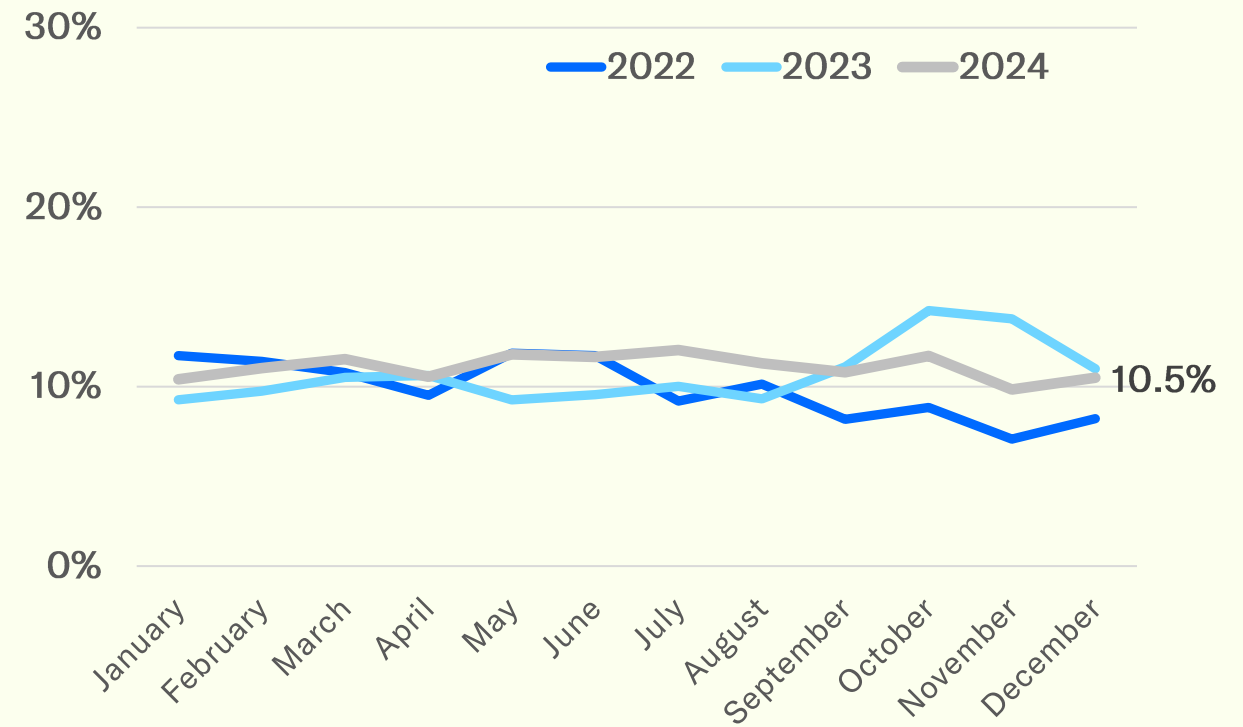
Day-dreamed about travel in the past week
(% of all American Travelers)





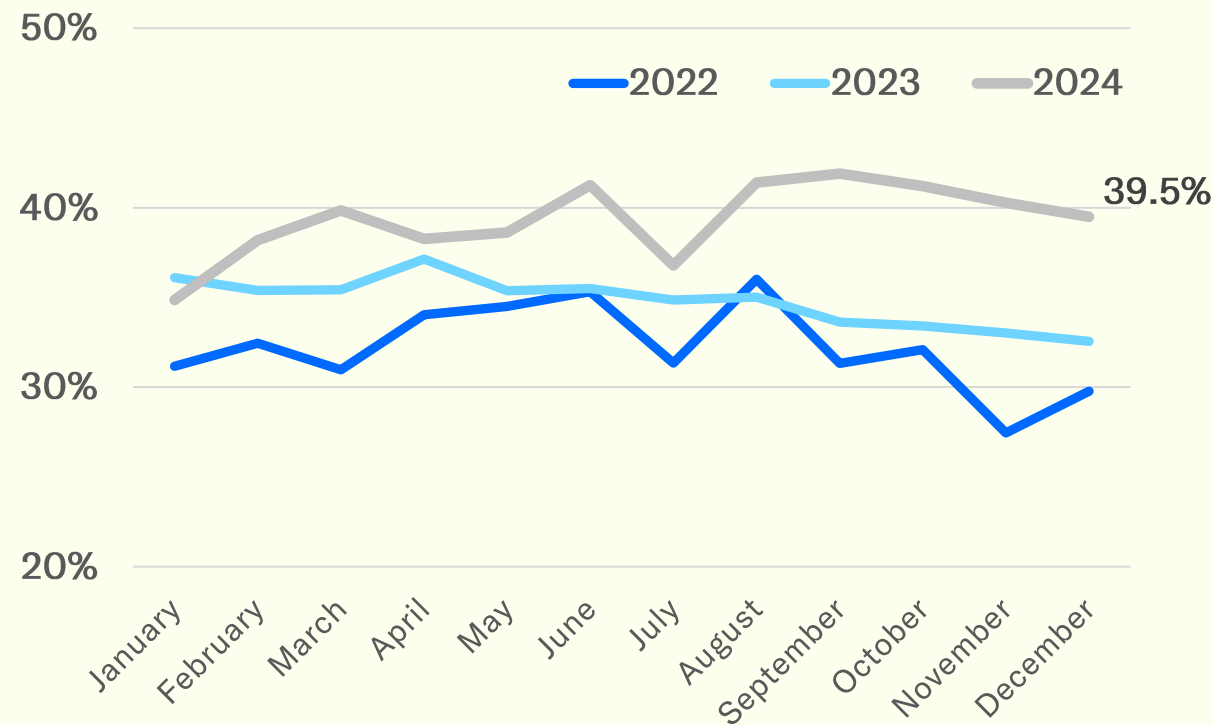
1-in-10 researched travel ideas offline

Researched offline in the past week
(% of all American Travelers)



Online research is thriving right now.

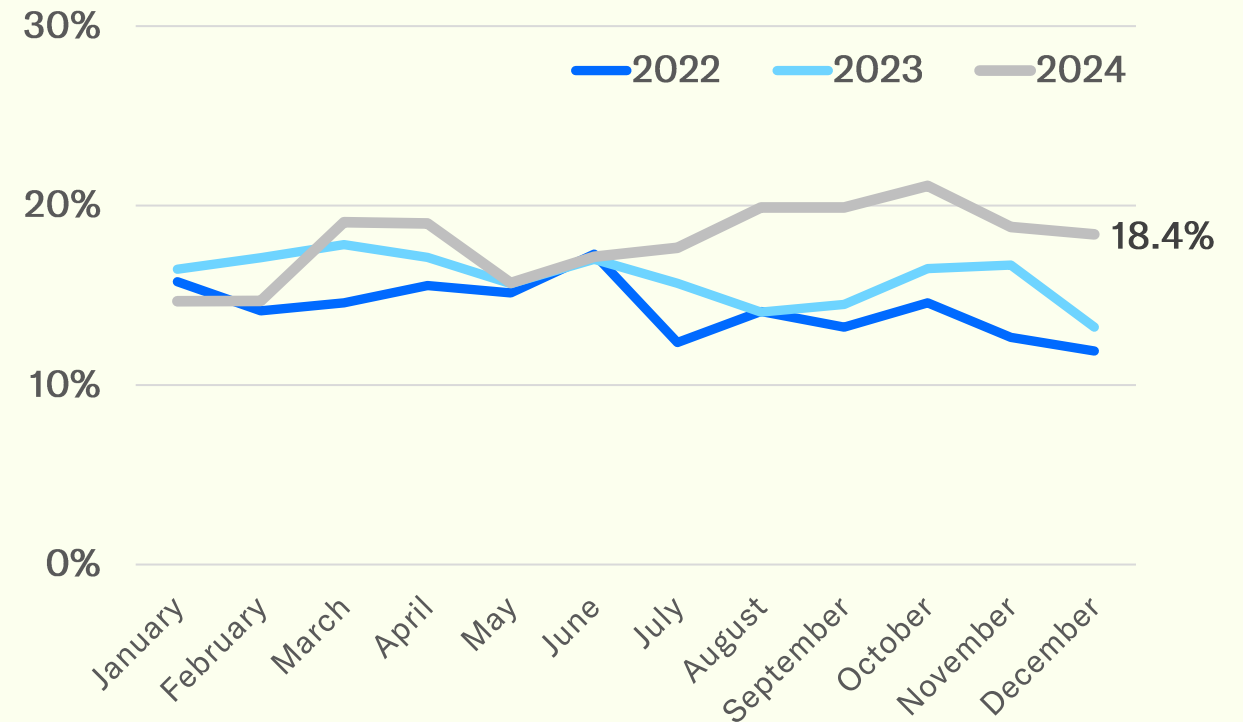
Researched about travel online in the past week
(% of all American Travelers)





Booking continues to be up significantly from this time last year

Made travel reservations in the past week
(% of all American Travelers)



Current travel sentiment improved slightly this month, and optimism remains solid as we move into the new year.

- **Travel budgets are strong**
- **Excitement to travel is at near record levels**
- **The expected number of future trips is growing**
- **Travel booking activity remains high**

South Dakota Specific KPIs

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Origin Markets

Recent Visitors to South Dakota (Past 12 Months)

Year

2024

Insights Explorer

States

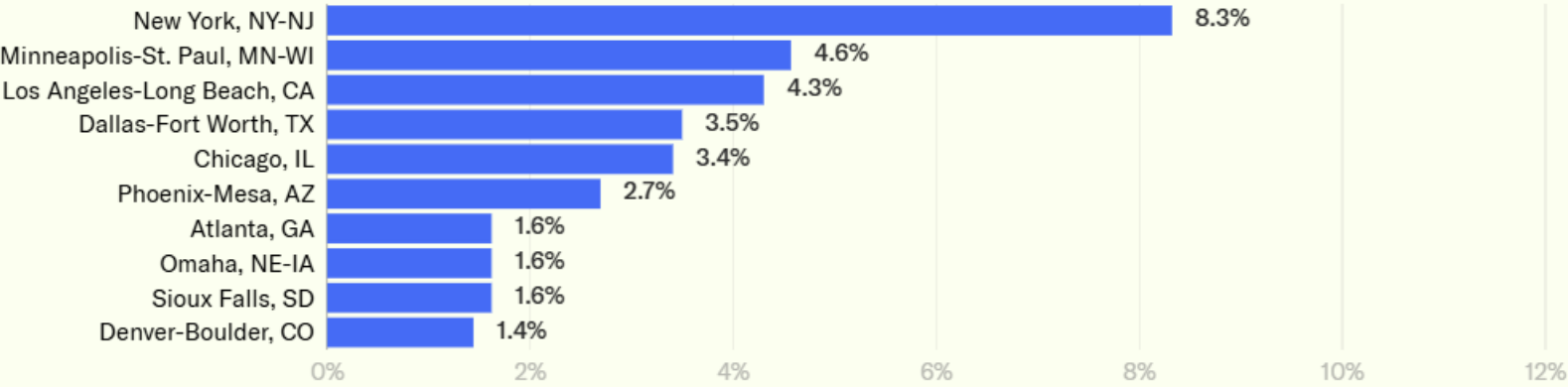
Filters

South Dakota

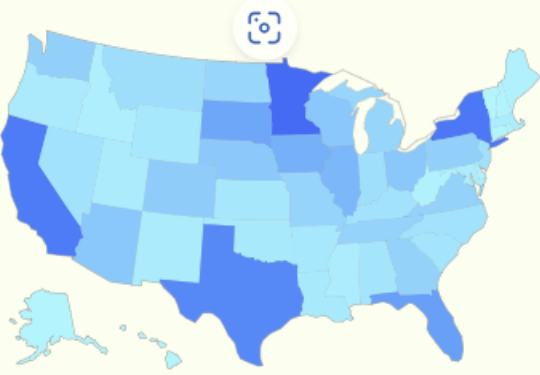
(All)

Recent Visitors

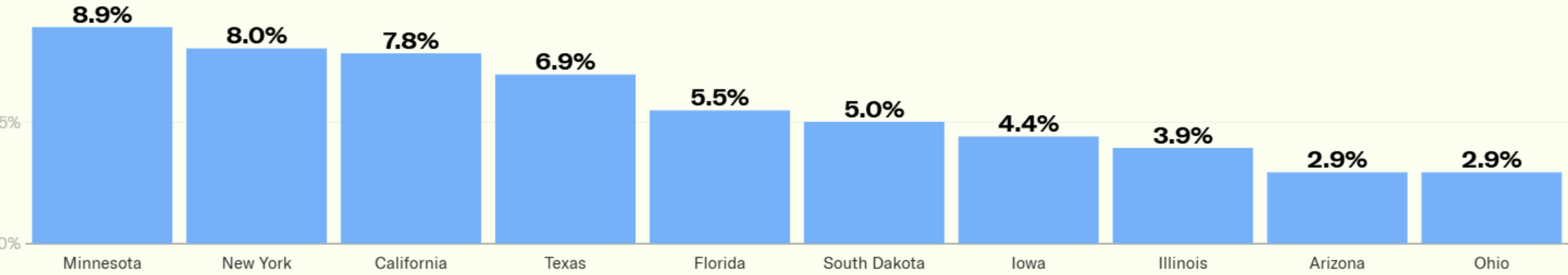
Top Origin Metros



Origin Map



Top Origin States



Travel Behaviors

Recent Visitors to South Dakota (Past 12 Months)

Year

2024

Insights Explorer

States

Filters

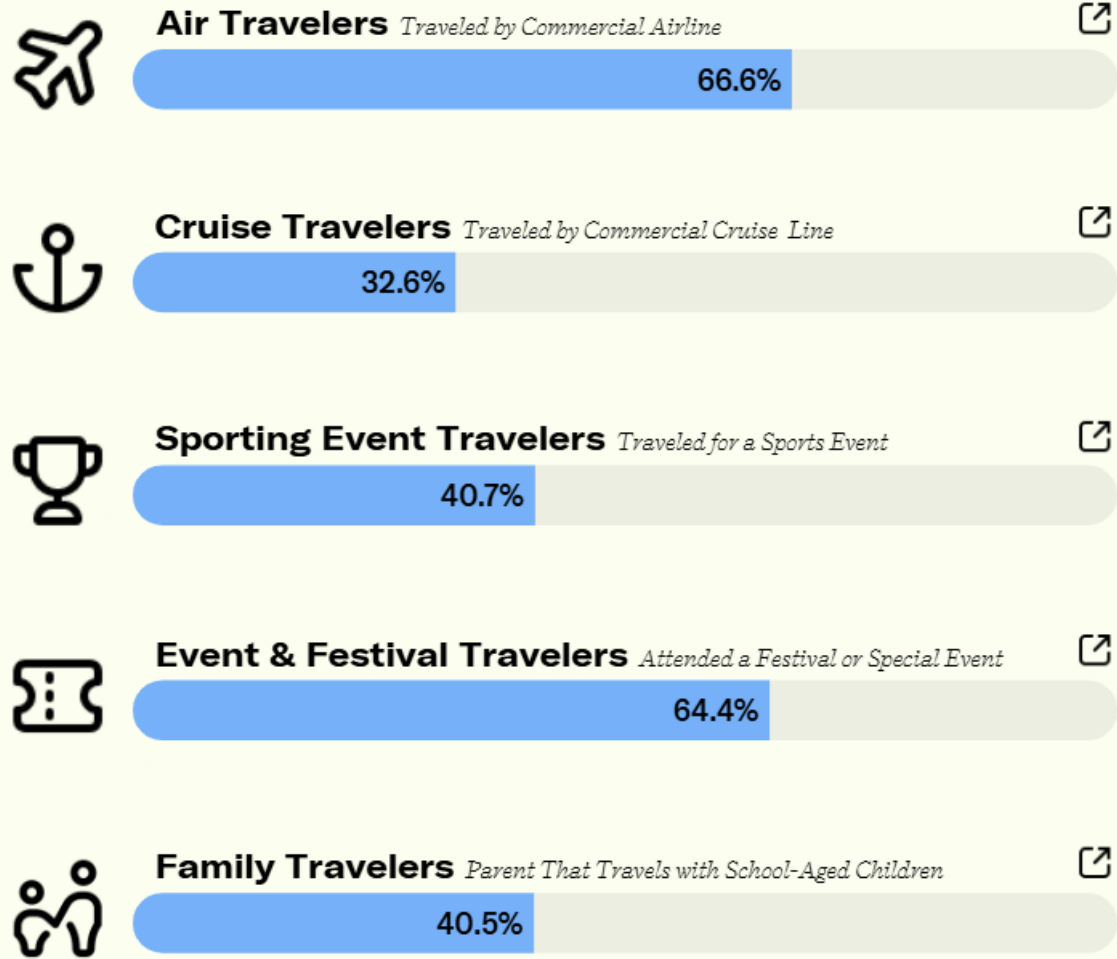
South Dakota

(All)

Recent Visitors

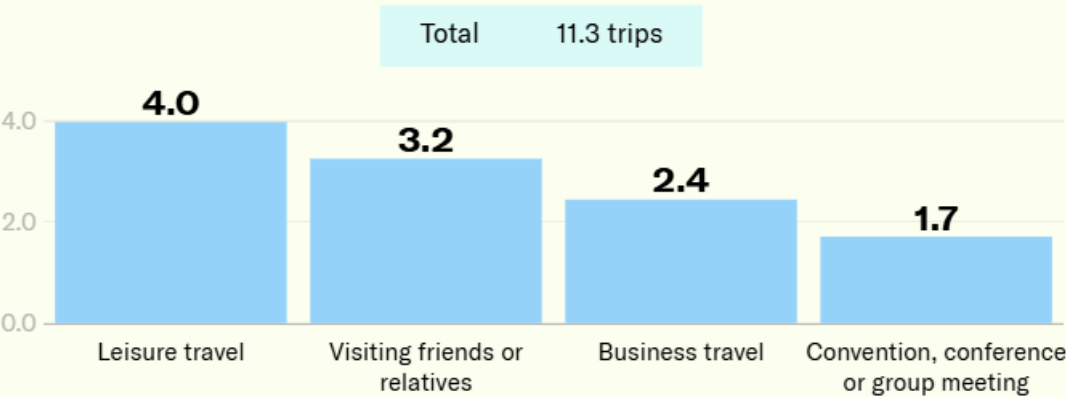
Traveler Segments

(Past 12 Months)



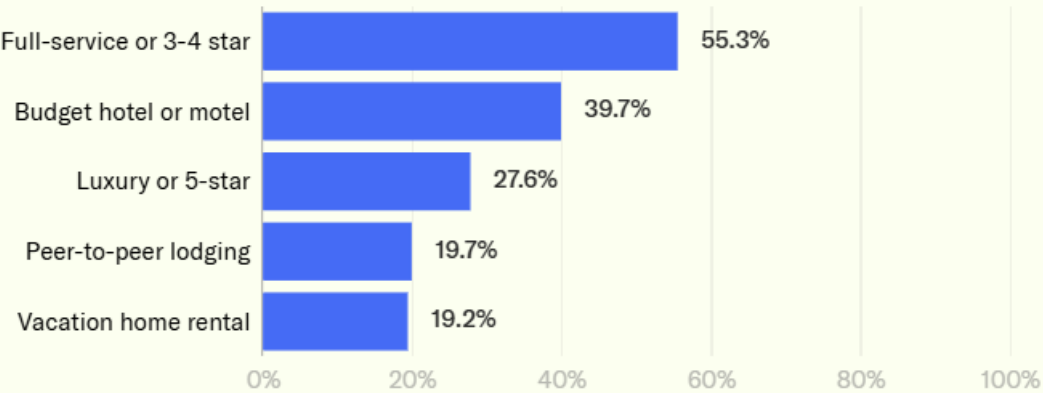
Trips Taken in the Past Two Years

(Average per Trip Type)



Paid Accommodations

(Overnight Stay in the Past Two Years)



Travel Sentiment

Recent Visitors to South Dakota (Past 12 Months)

Year

2024

▼

Insights Explorer

States

▼

Filters

South Dakota

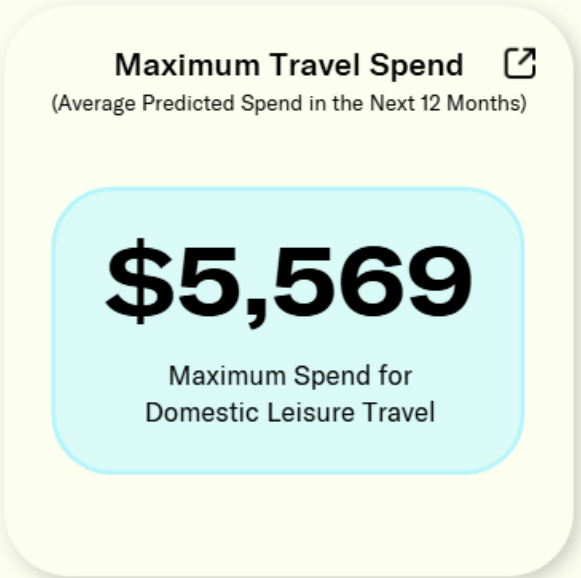
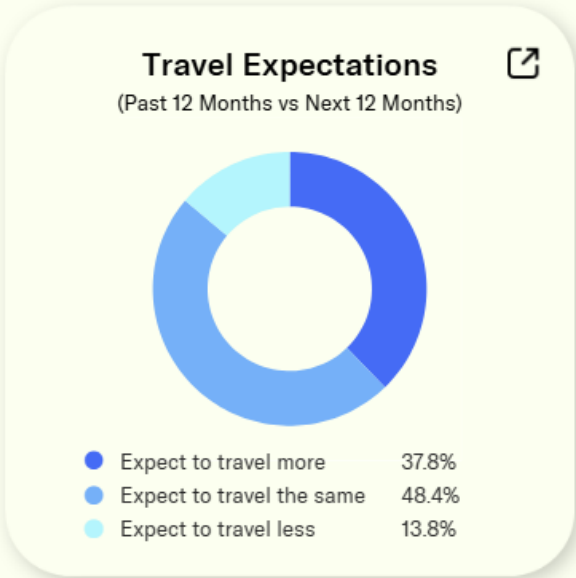
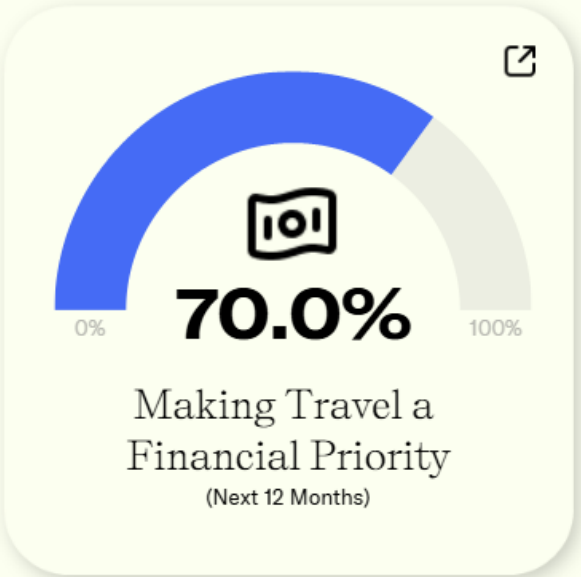
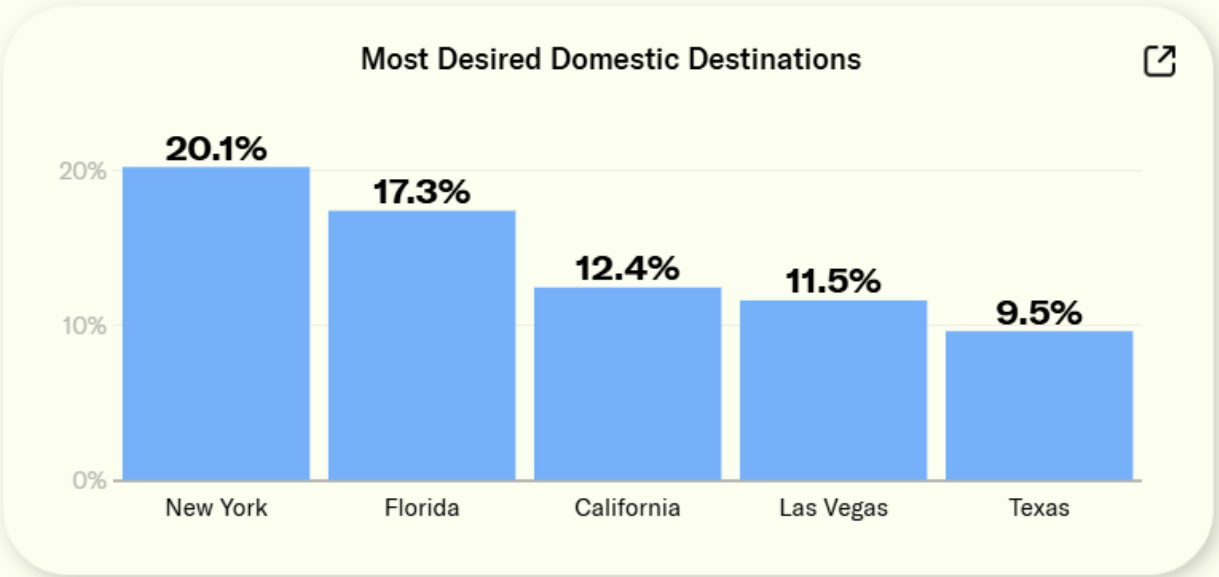
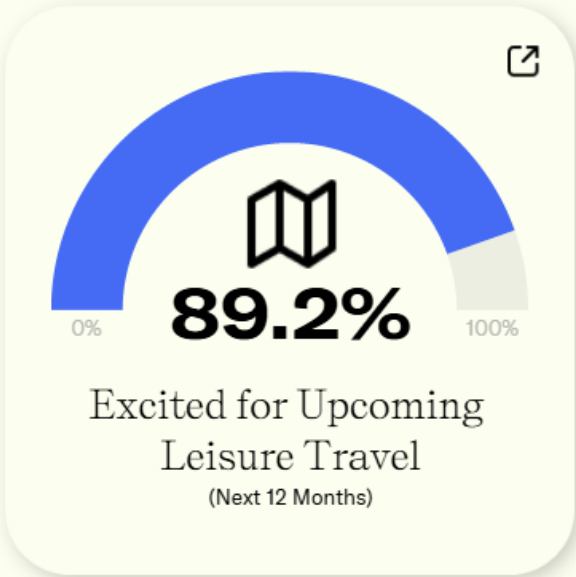
▼

(All)

▼

Recent Visitors

▼



Destination Attributes - Destination vs. Competitive Set

Year

2024

Destination Type

States

Destination

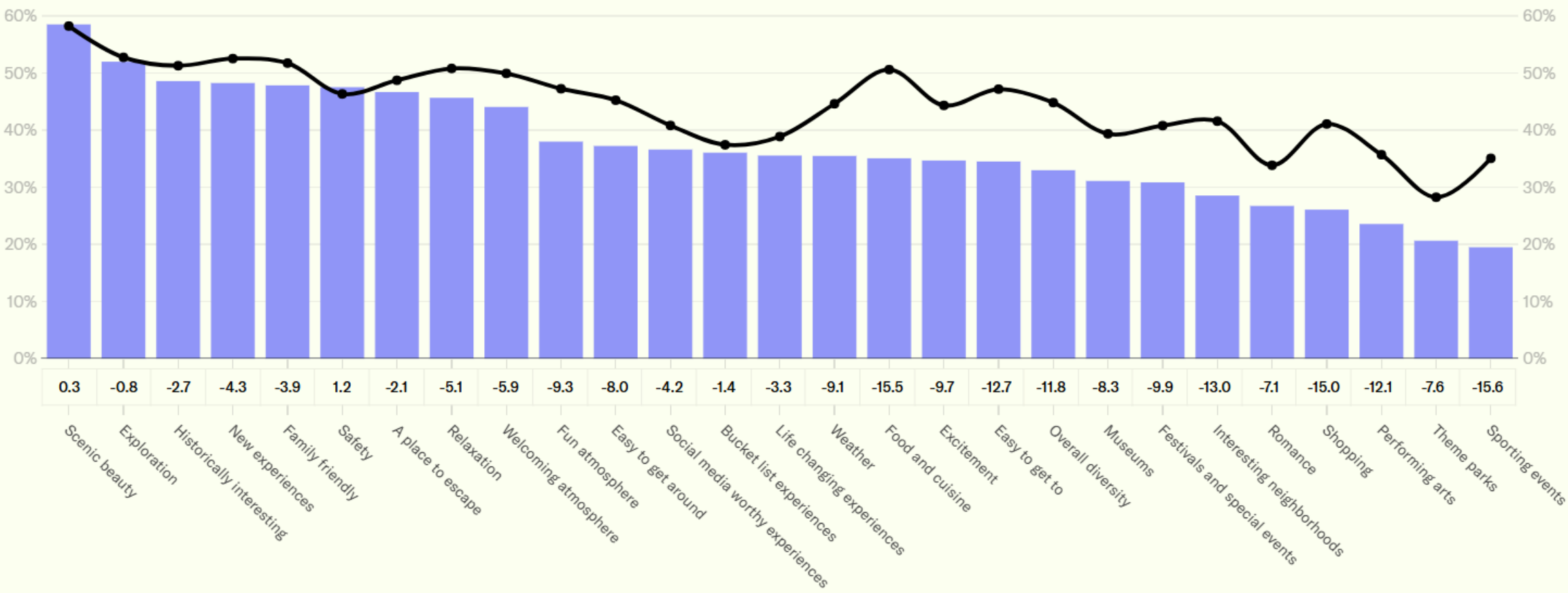
South Dakota

Competitive Set

(All)

Destination Attribute Ratings - South Dakota vs. Competitive Set
(Top 2 Box - % Rating Destination as "Good" or "Extremely good" for Delivering on each Attribute)

South Dakota
Competitive Set



Scenic Beauty

Destination Attribute Rating

Year

2024

Destination Type

States

Destination

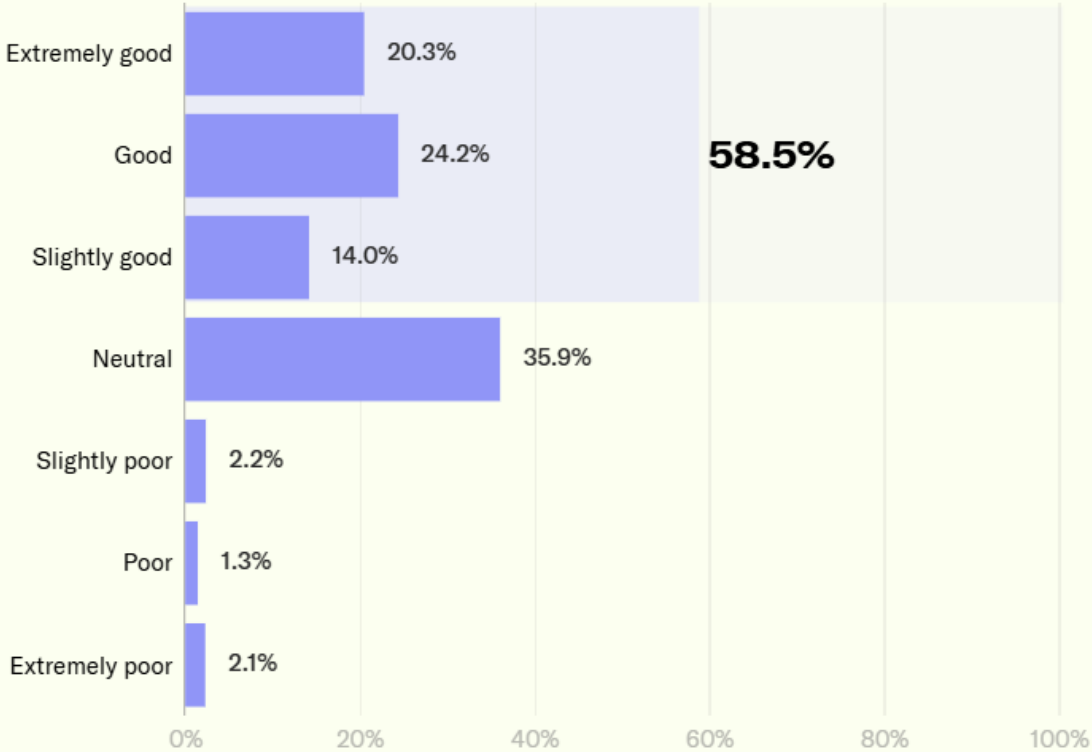
South Dakota

Competitive Set

(All)

South Dakota, 2024

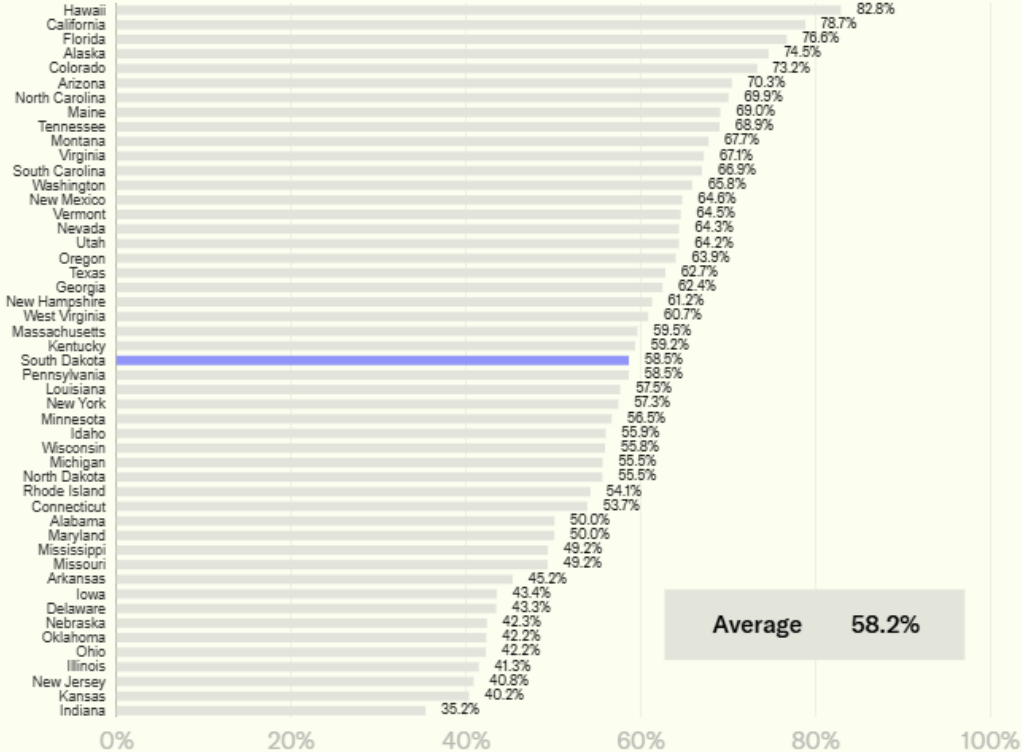
South Dakota Attribute Rating for: Scenic Beauty



Base: South Dakota set, 2024 respondents.
1,005 completed surveys.

States Ranked, 2024

(Top 3 Box - % Rating "Slightly Good" to "Extremely Good" for Each Destination: Scenic Beauty)



Base: Competitive set, 2024 respondents.
48,242 completed surveys.

Safety

Destination Attribute Rating

Year

2024

Destination Type

States

Destination

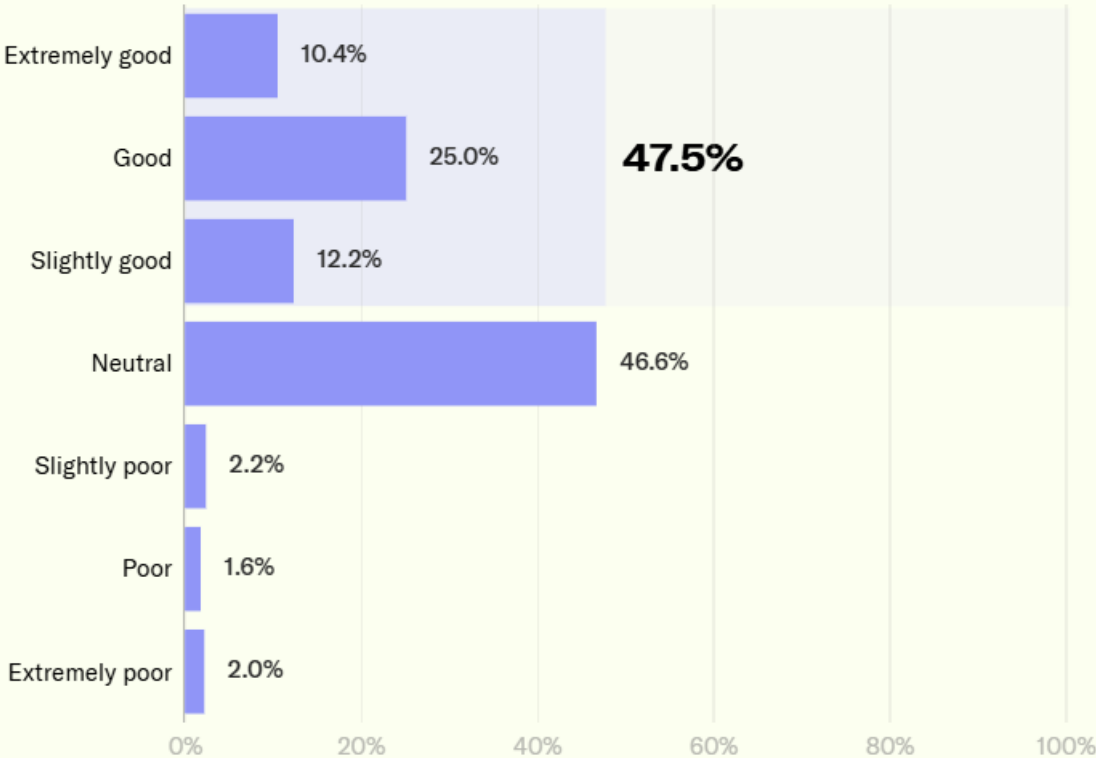
South Dakota

Competitive Set

(All)

South Dakota, 2024

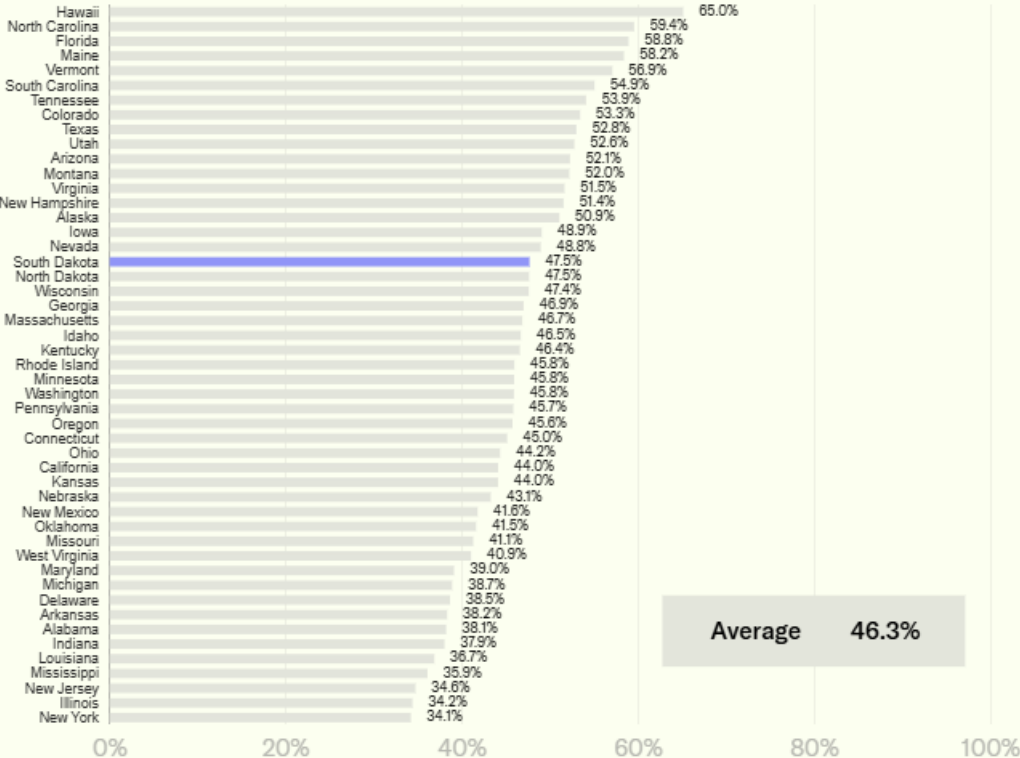
South Dakota Attribute Rating for: Safety



Base: South Dakota set, 2024 respondents.
1,005 completed surveys.

States Ranked, 2024

(Top 3 Box - % Rating "Slightly Good" to "Extremely Good" for Each Destination: Safety)



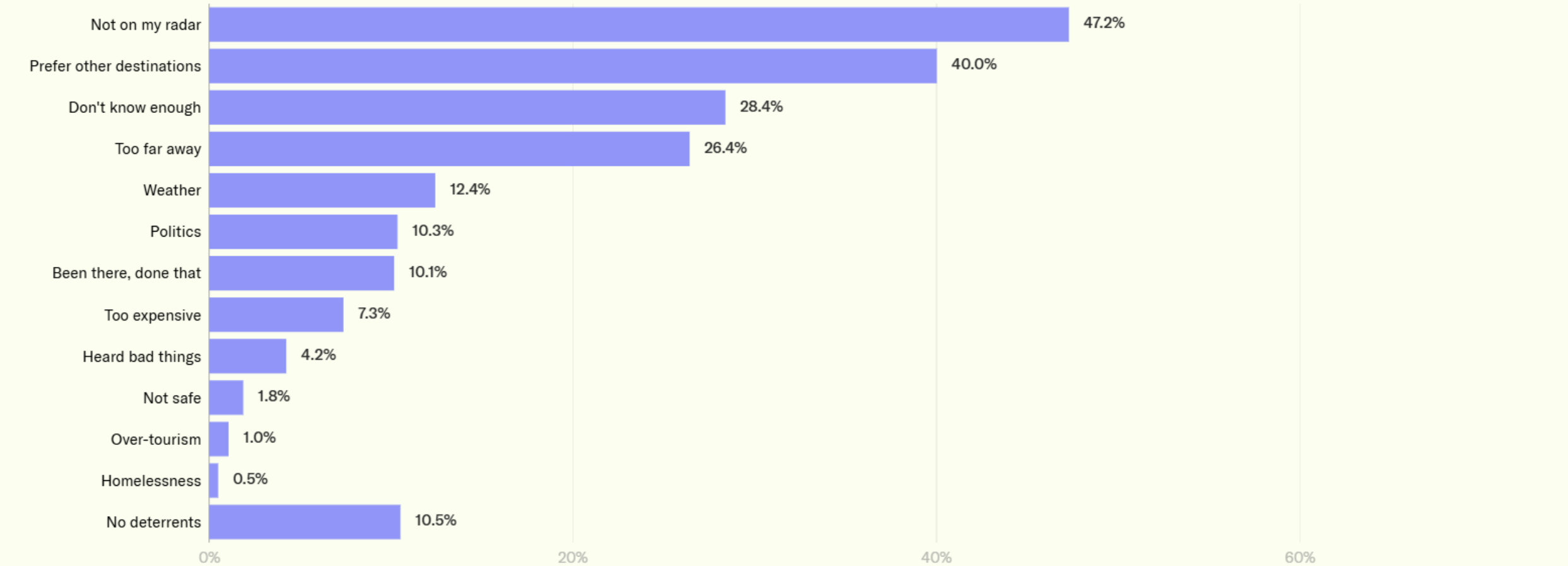
Average 46.3%

Base: Competitive set, 2024 respondents.
48,242 completed surveys.

Destination Deterrent Ratings

South Dakota, 2024

Deterrents for Traveling to South Dakota for Respondents Unlikely To Visit in the Next Two Years



Question: Which of the following accurately describe why you said you're unlikely to visit South Dakota in the NEXT TWO (2) YEARS?

Travel Nostradamus



Crowdsourcing Predictions for Travel in 2025



Prediction #1

Cost will remain a significant concern of travelers moving into the new year.



Inflationary pressure on travel costs

Statement:

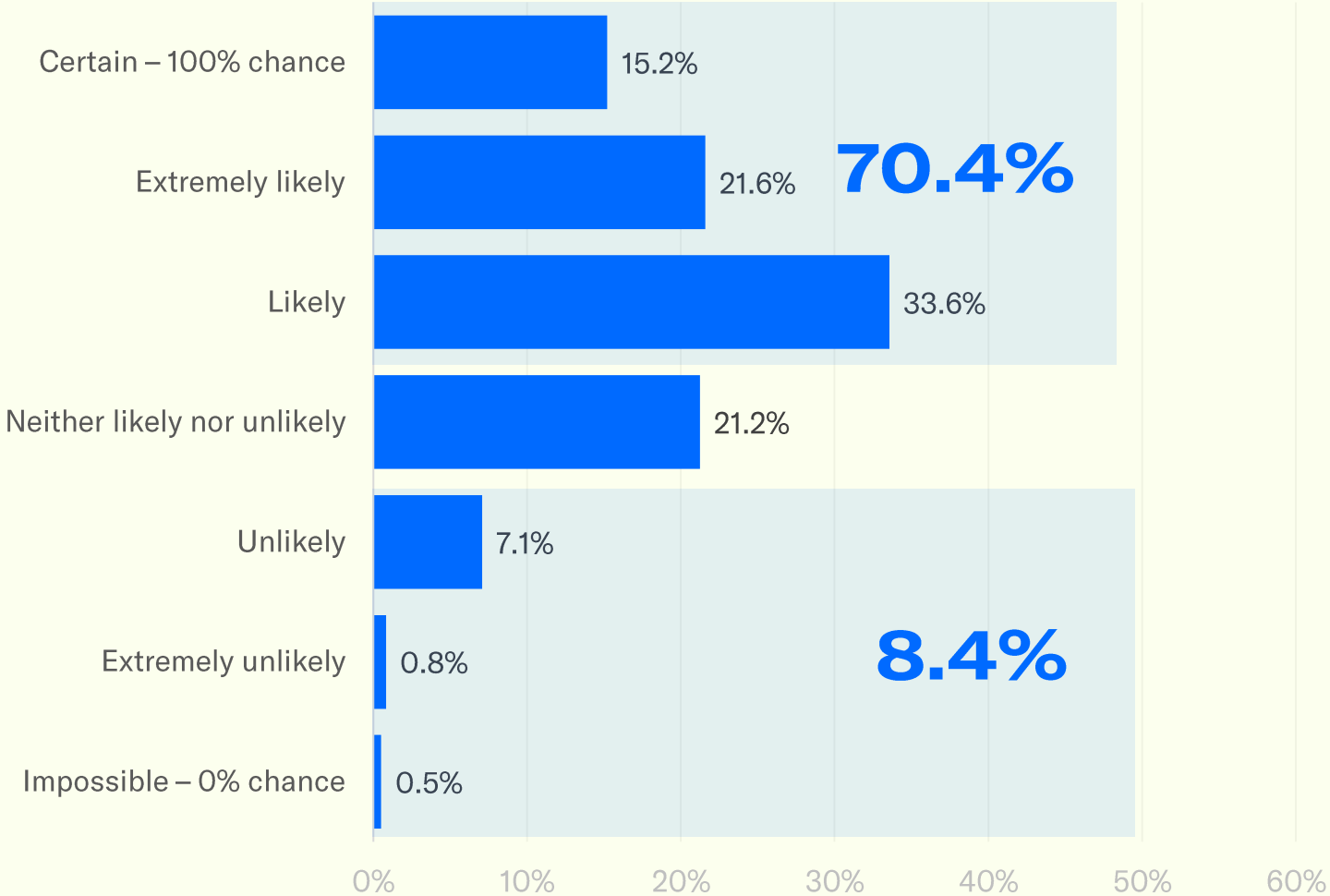
Inflation will drive travel costs up significantly.

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As close to unanimity as we get, nearly 3-in-4 travelers expect significant travel cost increase in 2025.

Statement:

Inflation will drive travel costs up significantly.





Budget-friendly destinations

Statement:

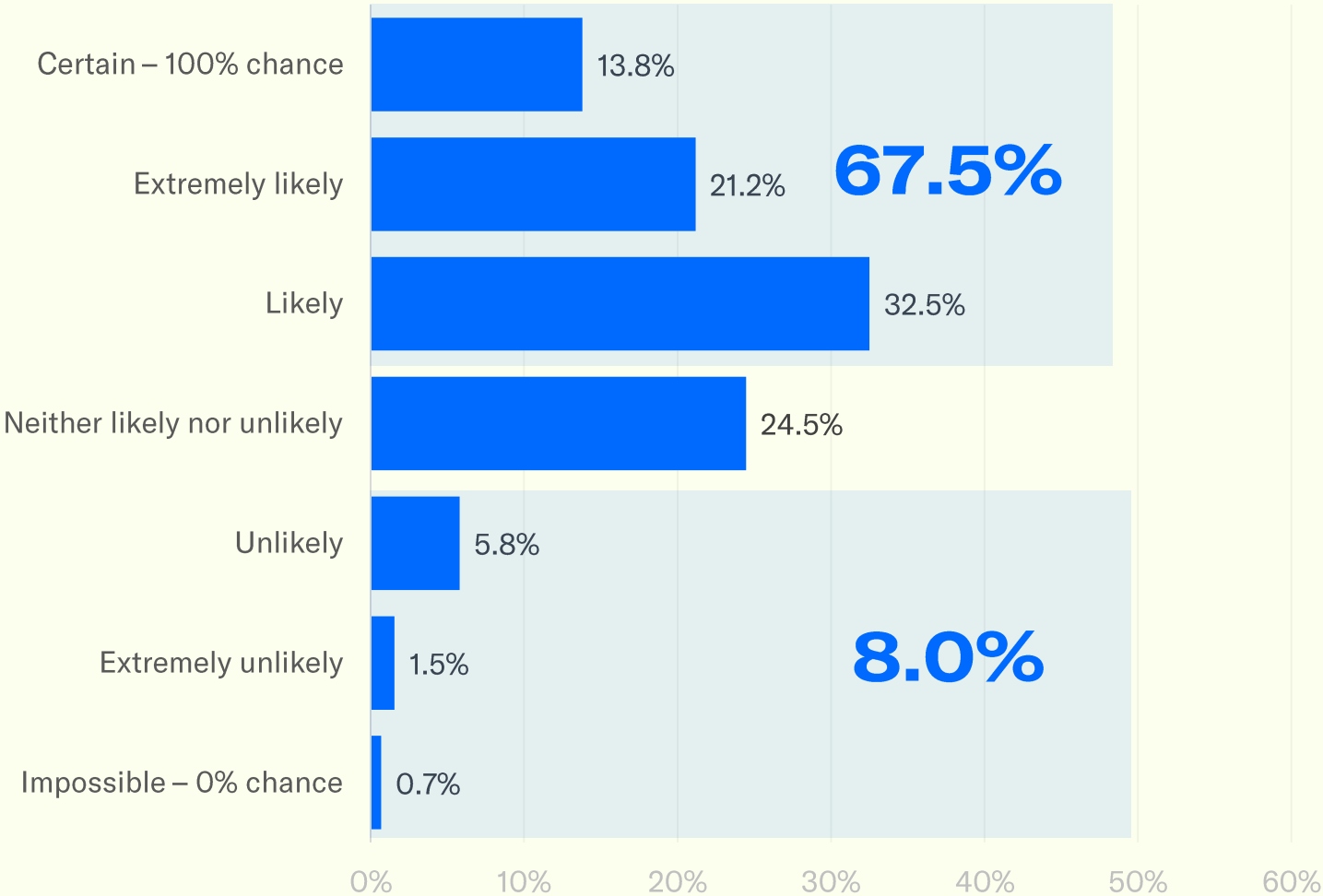
Budget-friendly destinations will become more popular in 2025.

Future Partners

The high cost of travel weighs heavily on travelers' minds, with most seeing budget-friendly travel growing in 2025.

Statement:

Budget-friendly destinations will become more popular in 2025.





The rise of dupes

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places. In 2025, visiting dupes will grow in popularity.

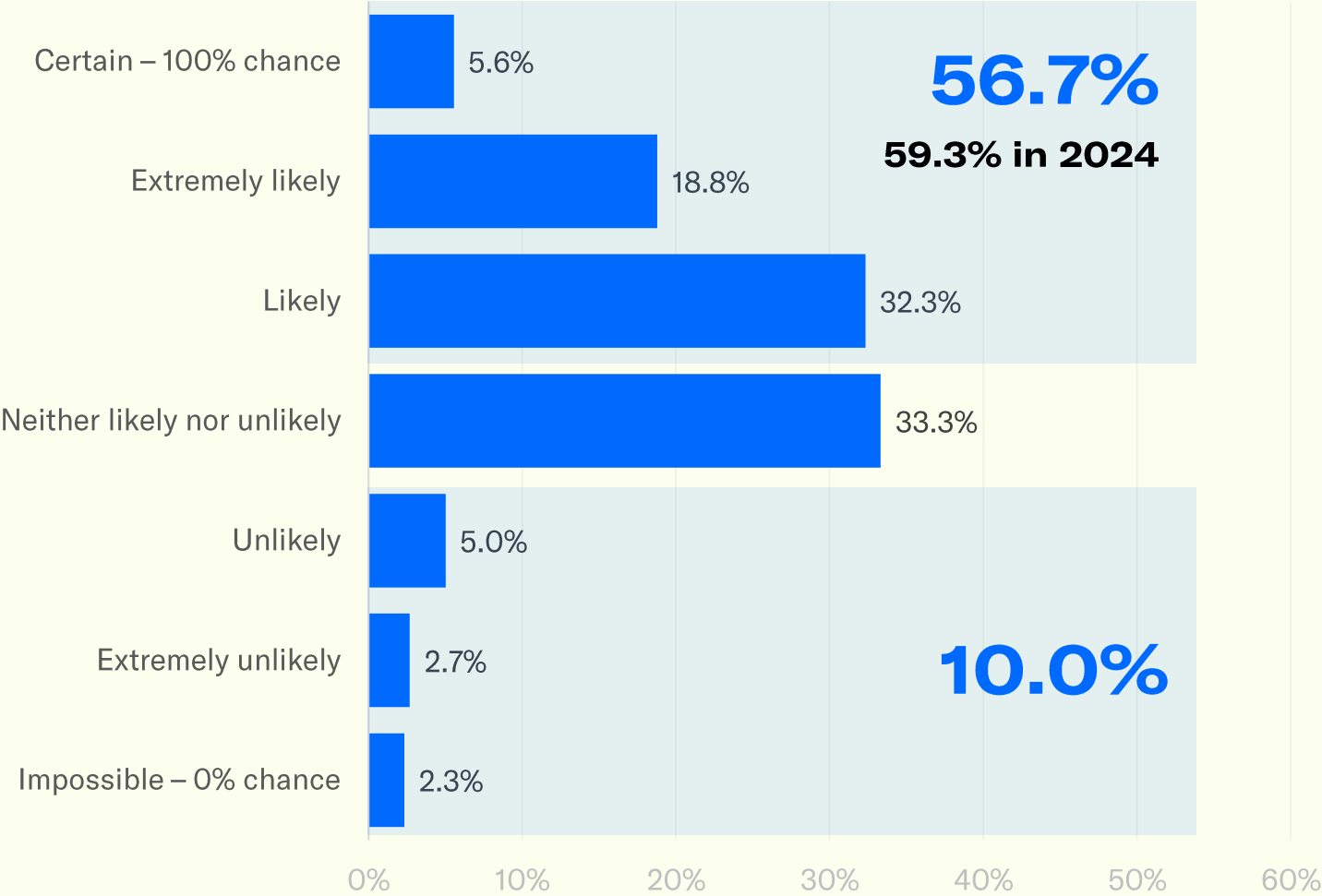
Future Partners

More than half of travelers see dupes as growing in popularity with travelers.

Statement:

“Dupes” is a slang word for destinations that are affordable alternatives to historically more expensive places.

In 2025, visiting dupes will grow in popularity.





The increasing popularity of off-the-beaten-path destinations

Statement:

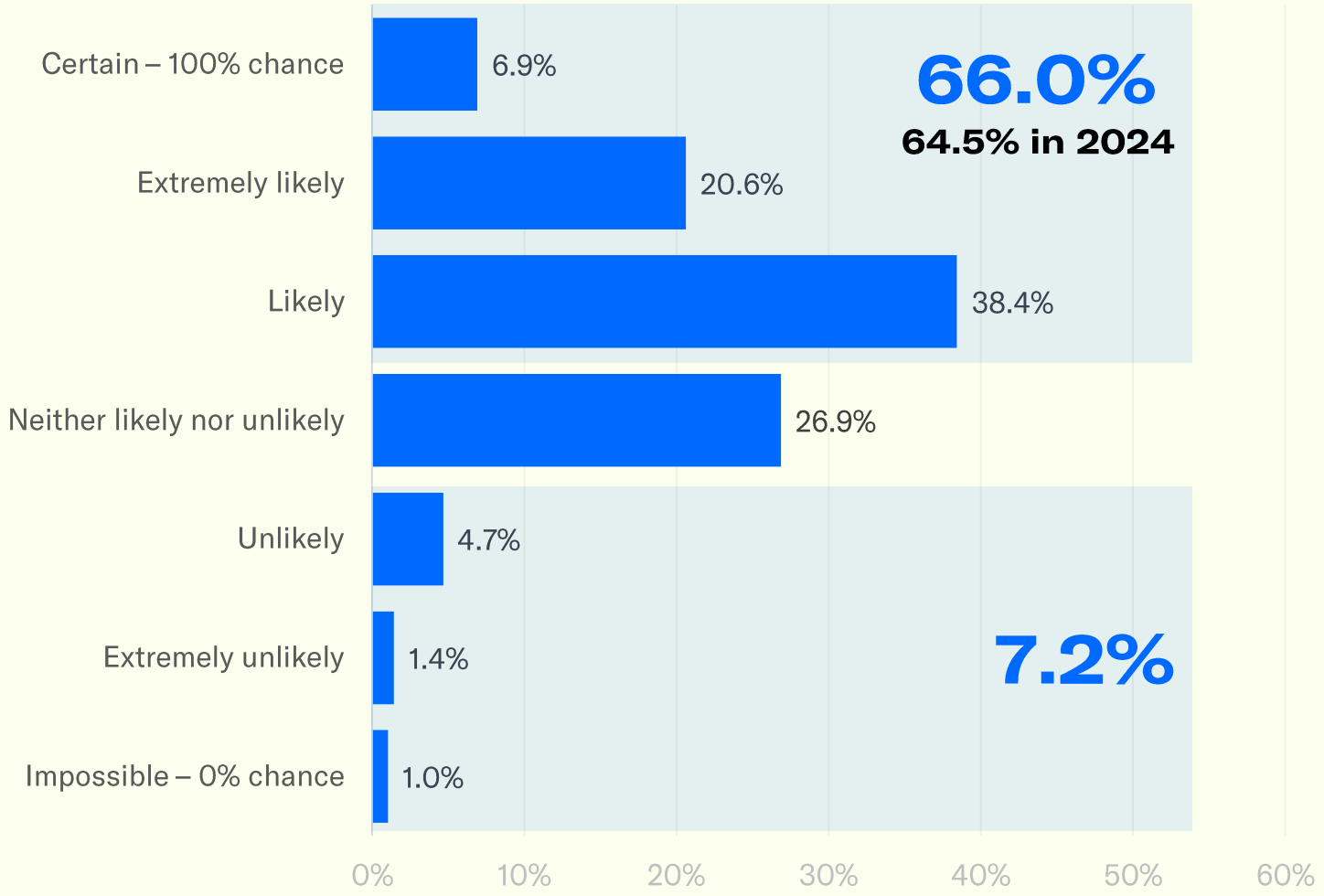
Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.

Future Partners

Like last year, 2-in-3 travelers see the market responding to high costs and crowding by moving to off-the-beaten-path destinations.

Statement:

Undiscovered or off-the-beaten-path travel destinations will grow in popularity due to the crowding and high costs of popular destinations.





Buy Now, Pay Later in 2025

Statement:

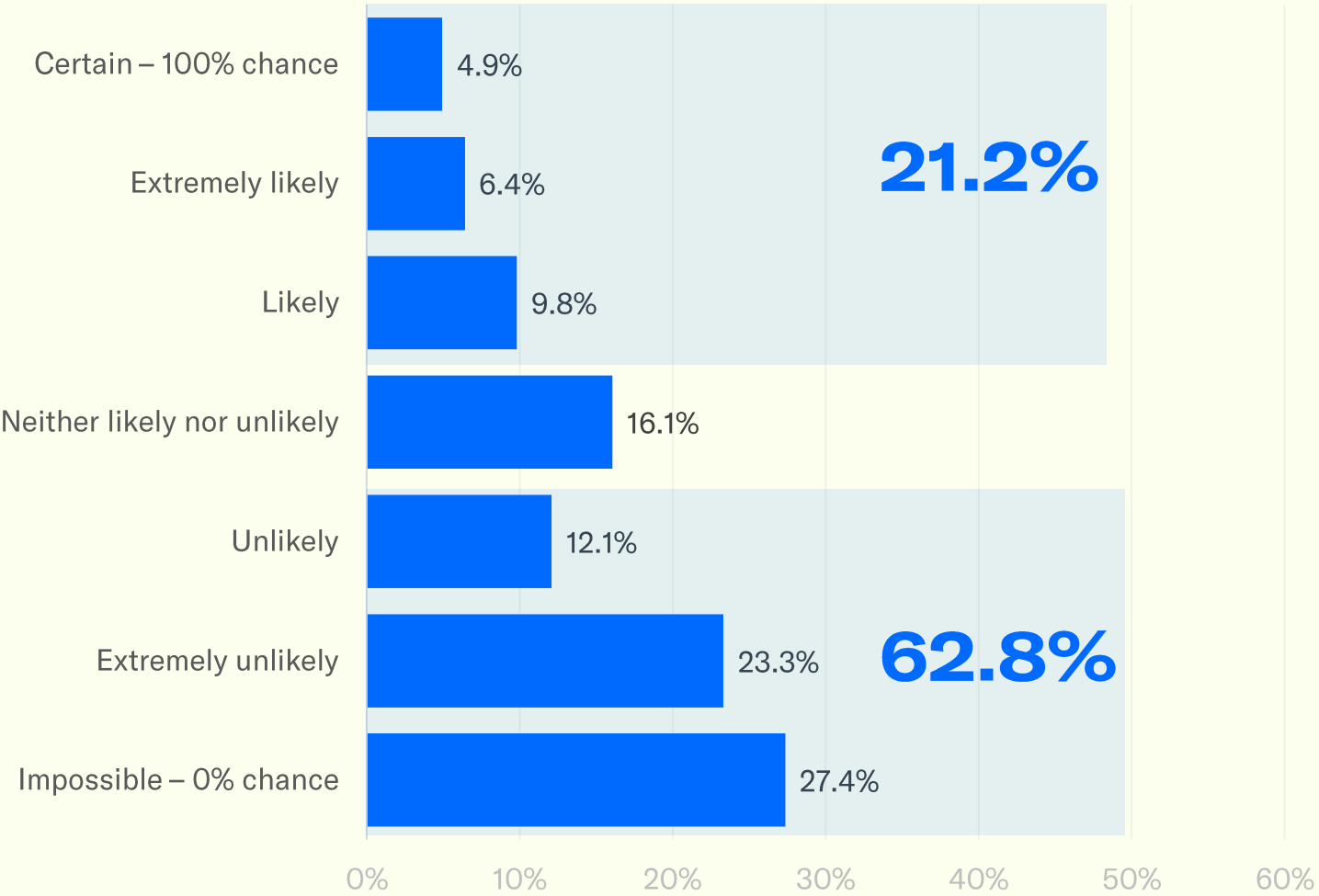
I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.

Future Partners

More than 1-in-5 American travelers expect to use BNPL offers for travel in the coming year.

Statement:

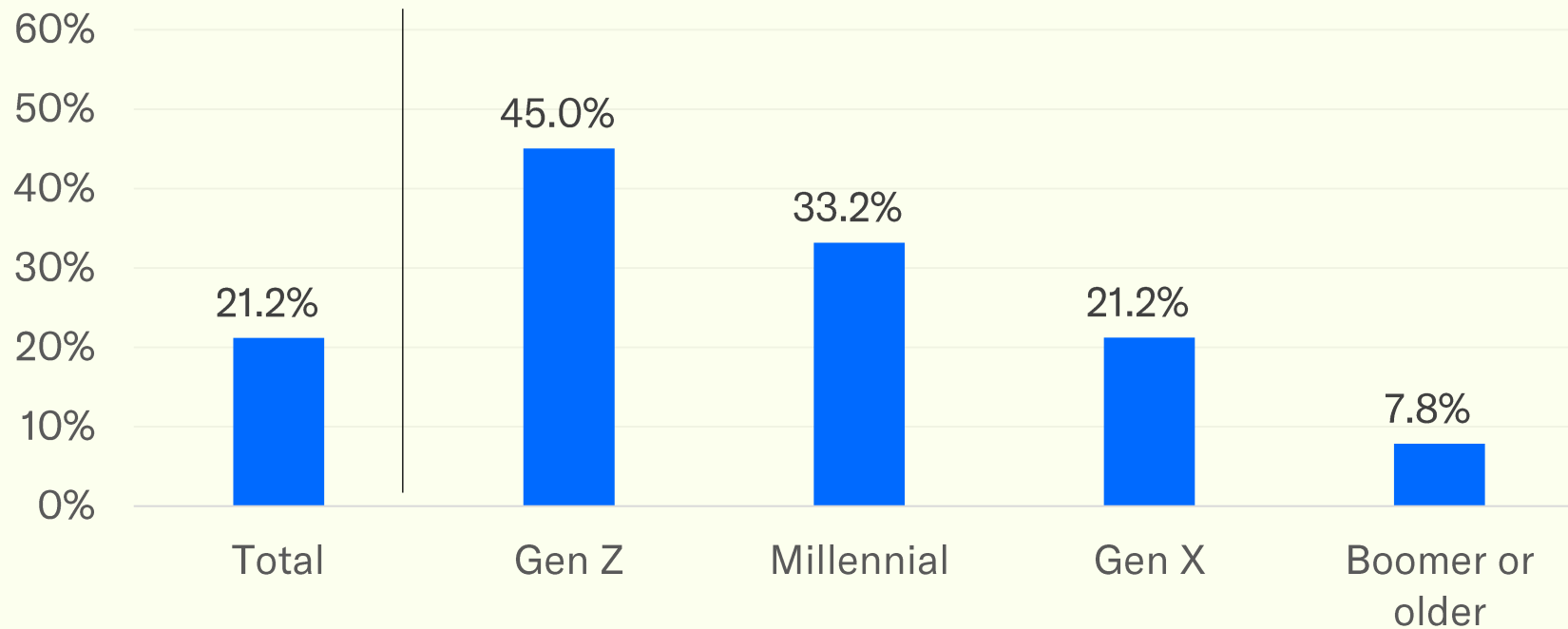
I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.



Younger generations are the most likely to use BNPL options, particularly Gen Z

Statement: I'll be using "Buy Now, Pay Later" payment plans for some of my trips in 2025.

% Certain or Likely to use Buy Now Pay Later Plans to Book/Pay for Travel in 2025





Spending on luxury travel

Statement:

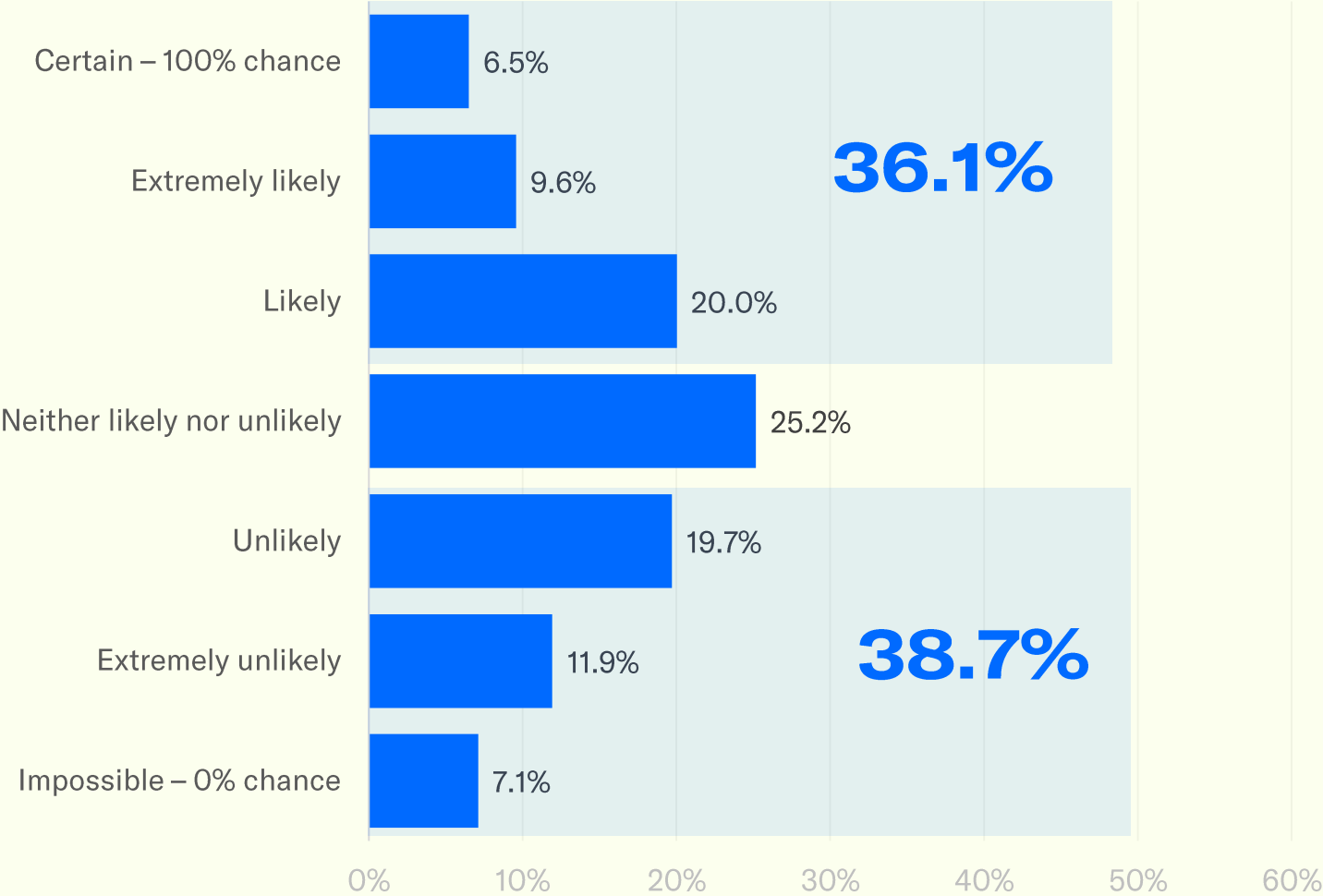
I will spend more money on luxury travel experiences.

Future Partners

Luxury travel experiences will matter to many American travelers.

Statement:

I will spend more money on luxury travel experiences.





Prediction #2

**More (Personal and Travel)
Stress Ahead**



A stressed-out nation?

Statement:

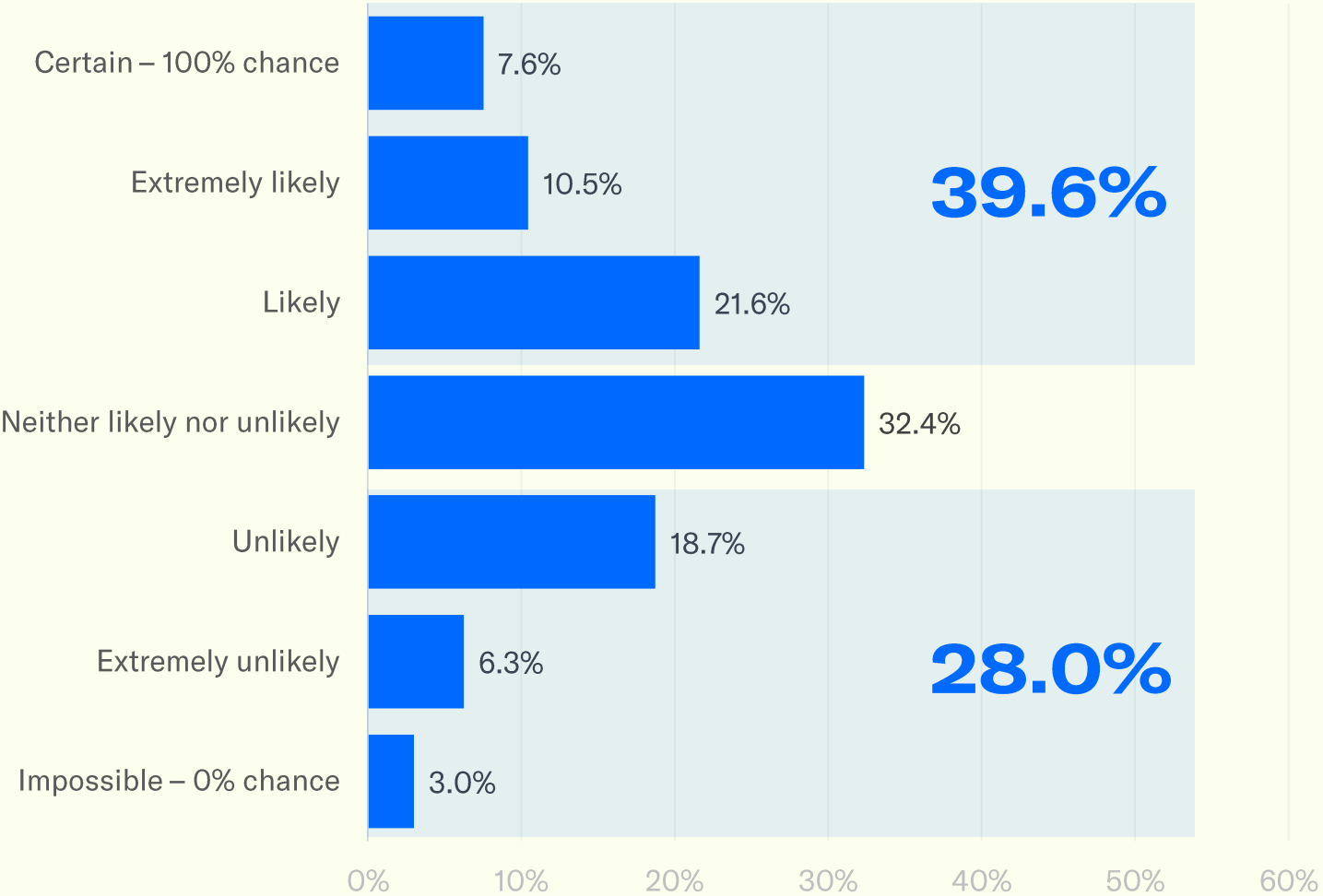
My overall stress levels will rise significantly.

Future Partners

Nearly 40% of American travelers expect this year to be one of rising personal stress levels.

Statement:

My overall stress levels will rise significantly.





Travel frustrations continue

Statement:

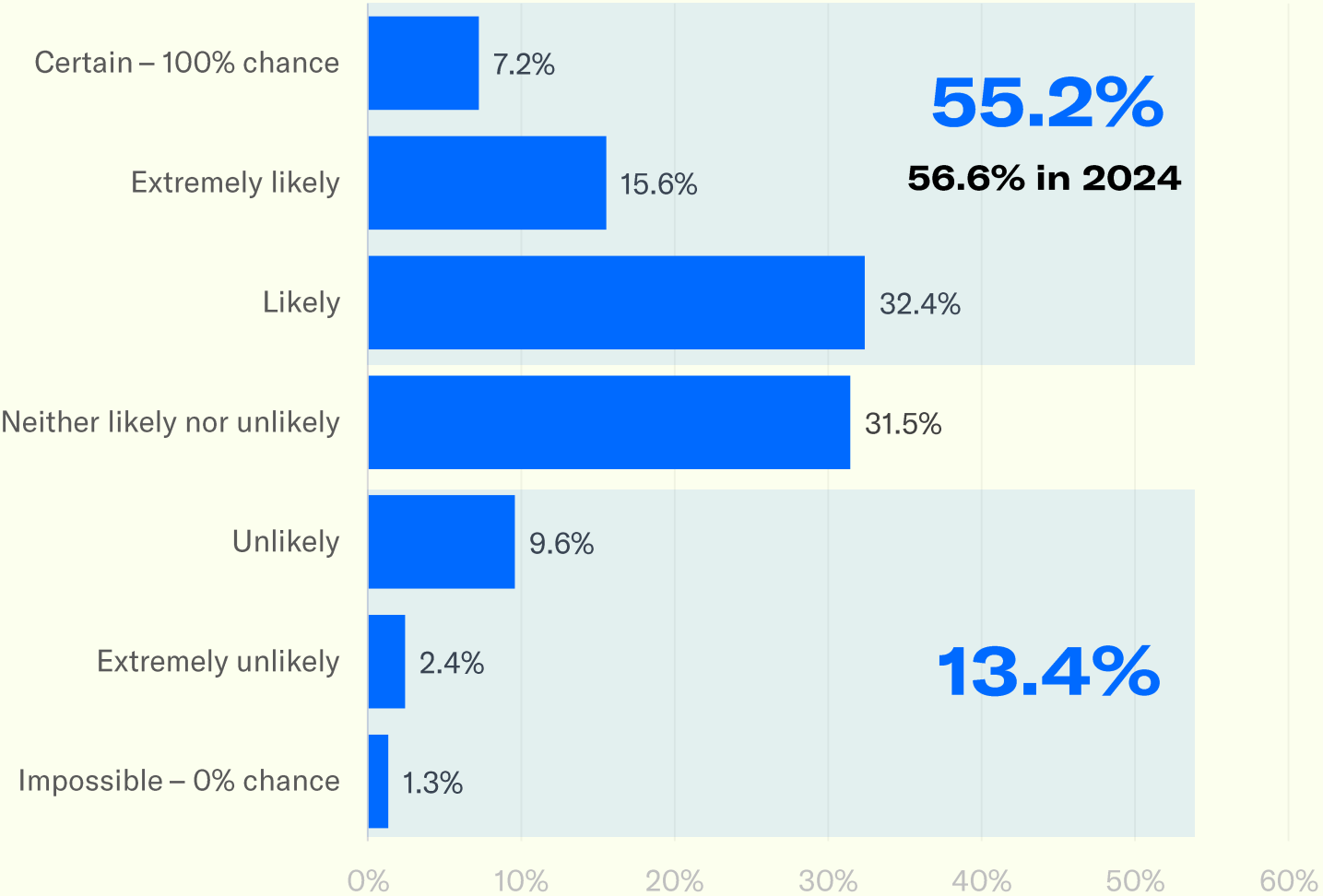
Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)

Future Partners

Many see domestic travel as an increasingly frustrating experience.

Statement:

Domestic travel will become generally more frustrating (e.g., over-crowding, air travel breakdowns, poor customer service, etc.)





Prediction #3

**Concerns related to
sustainability will be of
significant but not growing
importance to travelers.**



Mitigating environmental impact

Statement:

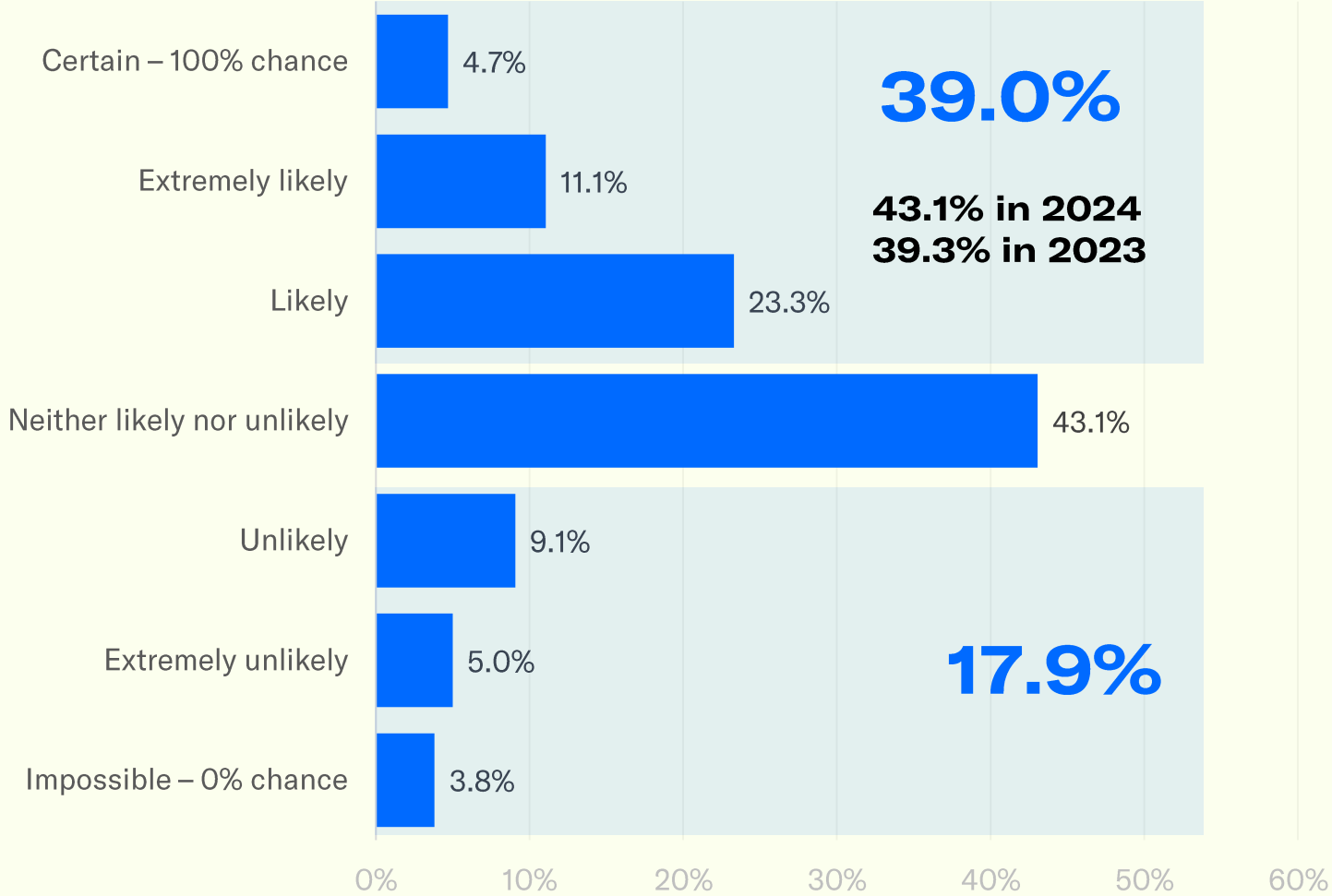
I'll be more proactive in reducing the impact of my travel on the environment.

Future Partners

Four-in-ten travelers will be more proactive in reducing the impact of their travels on the environment.

Statement:

I'll be more proactive in reducing the impact of my travel on the environment.





Cooler places to travel

Statement:

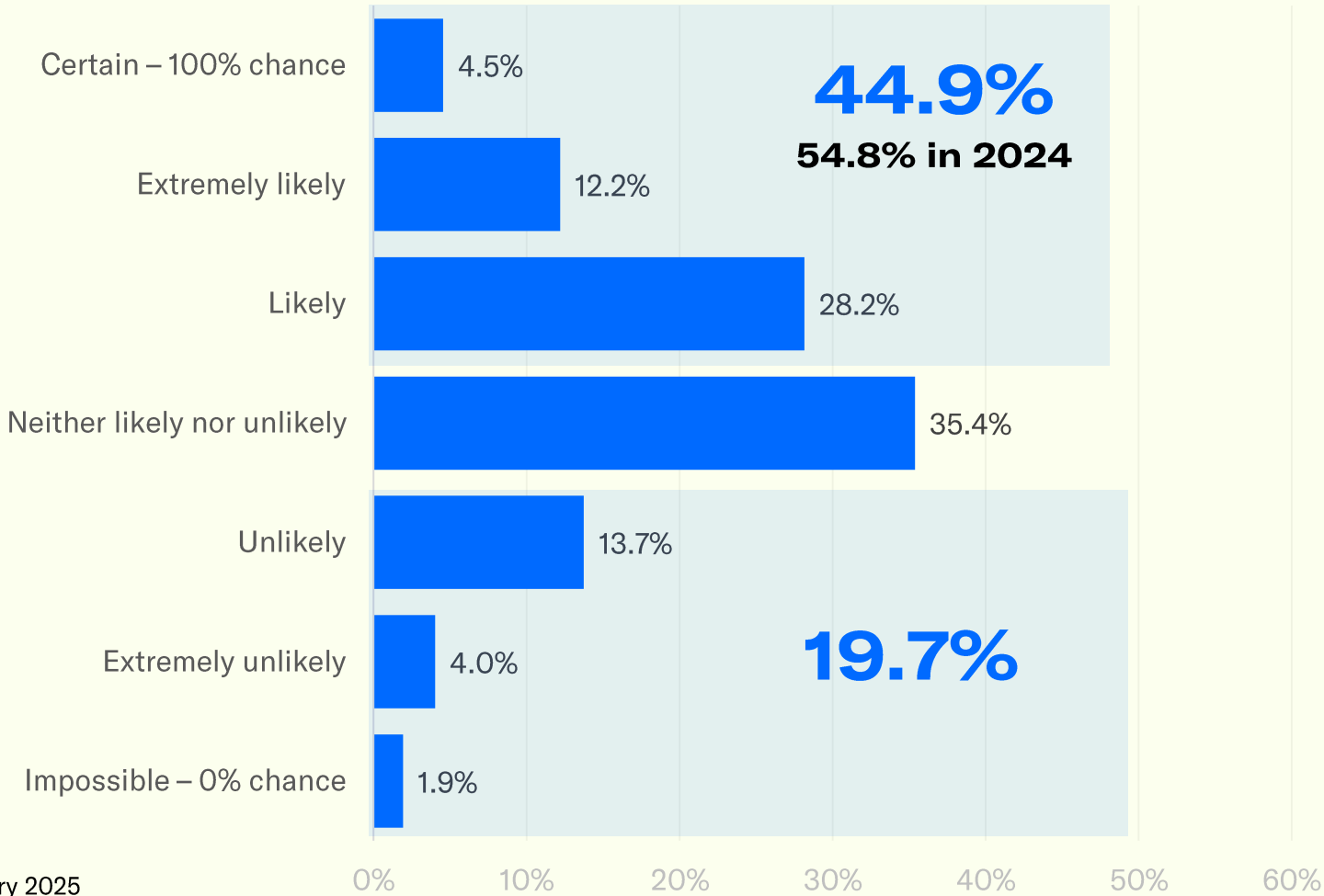
With higher temperatures each year, travelers will try to seek out cooler places.

Future Partners

45% of American travelers predict that increasingly warmer climates will drive travelers to seek cooler destinations for their trips

Statement:

With higher temperatures each year, travelers will try to seek out cooler places.





Prediction #4

Technology will play
a growing role in the
evolution of travel planning.



Artificial Intelligence as a travel planning tool

Statement:

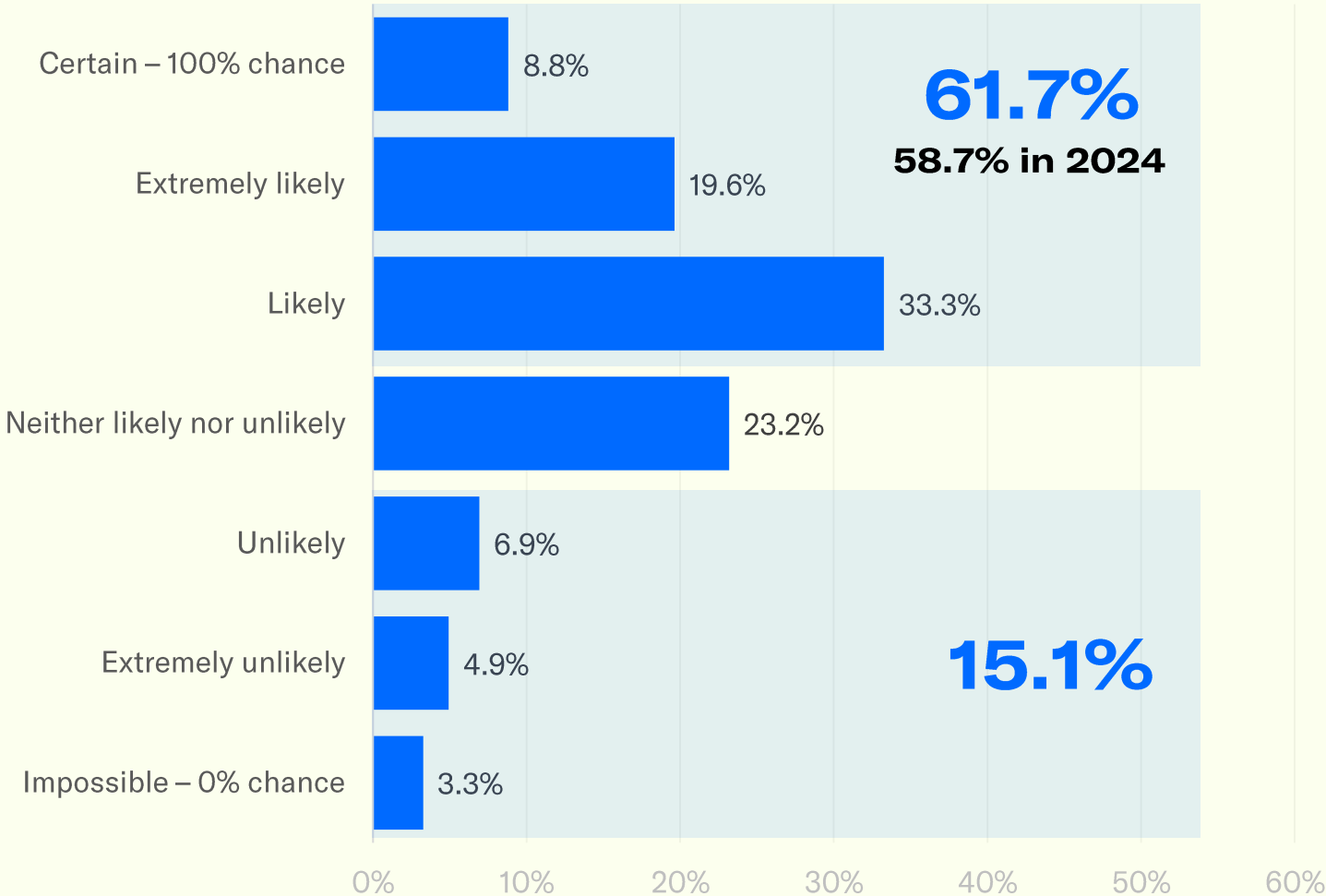
Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.

Future Partners

Robots will soon be planning our trips? Maybe not, but travelers see AI as growing in importance to the travel planning landscape.

Statement:

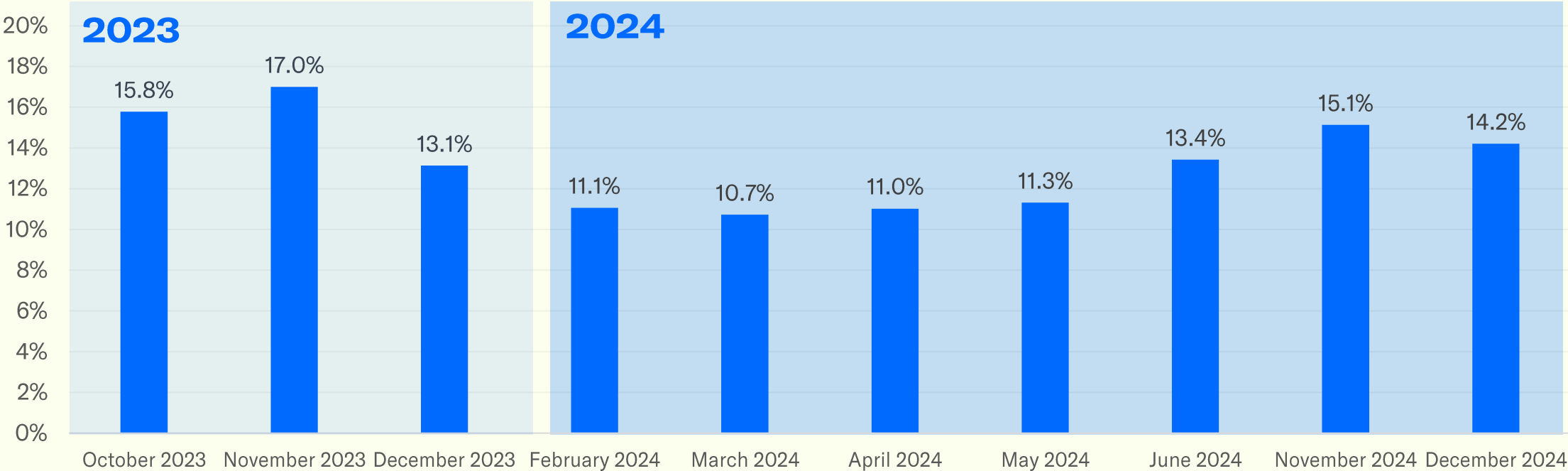
Using Artificial Intelligence (AI) tools (like ChatGPT and Gemini) to plan travel will become much more popular.



However, adoption of AI tools for travel planning has not yet gained significant ground.

Question: In the past 12 months, have you used any Artificial Intelligence (AI) tools specifically to help you plan (or prepare for) your trips?

%Yes (Used AI tools to plan trips in the past 12 months)
Historical data





Communication breakdowns. A thing of the past?

Statement:

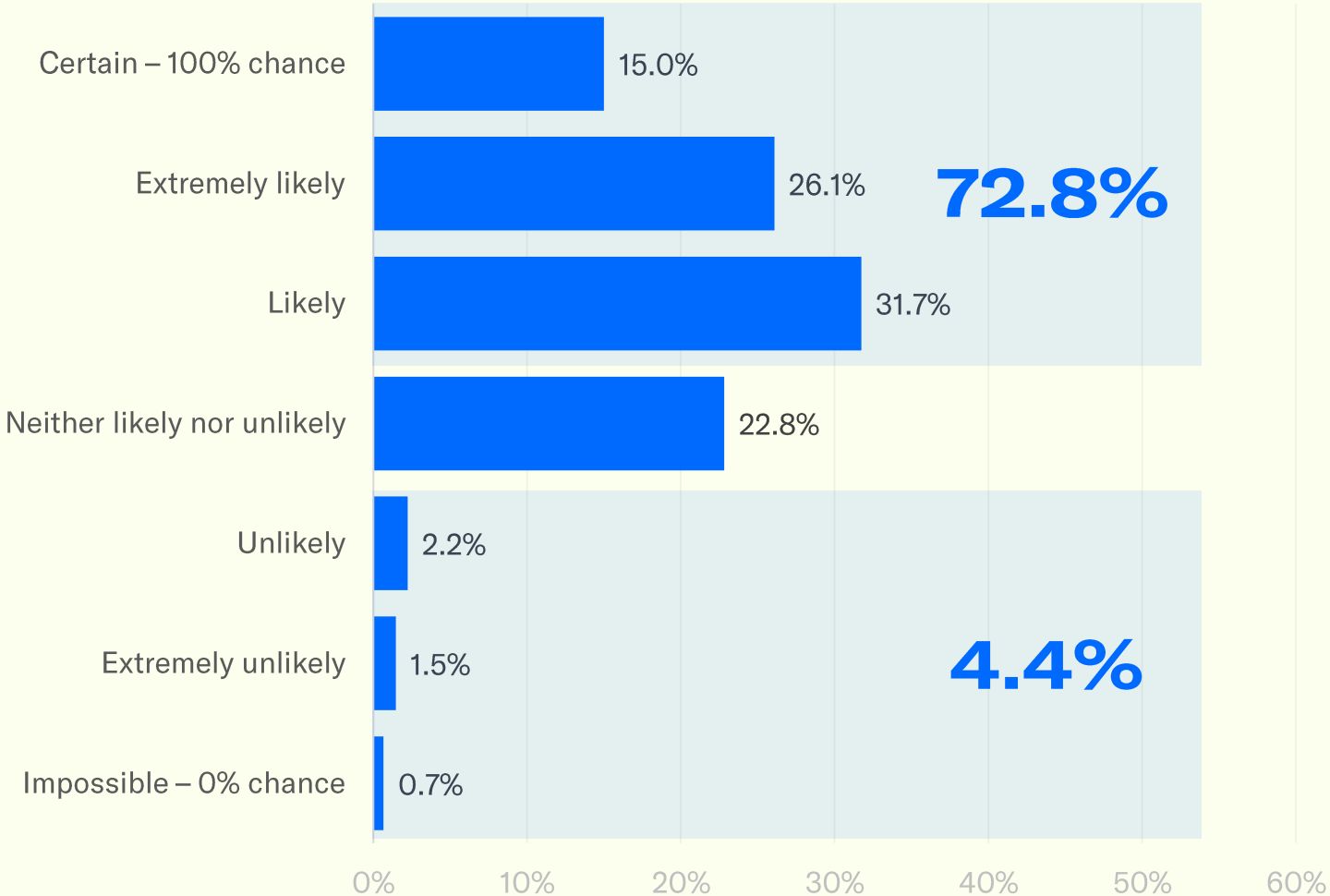
Apps for translating languages will be used more when traveling abroad.

Future Partners

Translation apps for international travel are anticipated to see heavy use in the coming year.

Statement:

Apps for translating languages will be used more when traveling abroad.





Smart phone addiction disorder (SPAD)

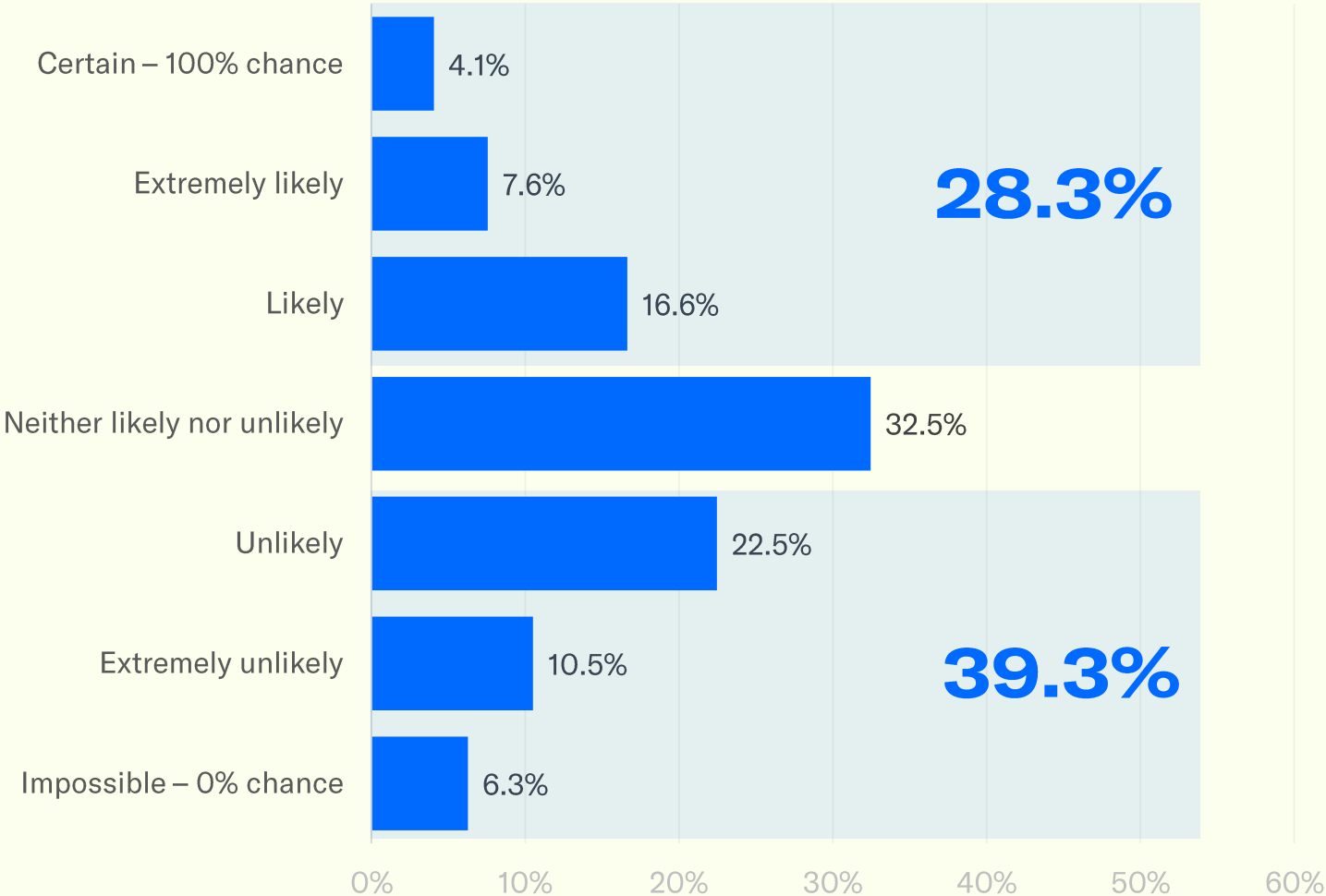
Statement:

I will make an effort to reduce my smartphone use.

Over 28% of American travelers will try and reduce their smart phone usage.

Statement:

I will make an effort to reduce my smartphone use.





Mainstream Media Blues

Statement:

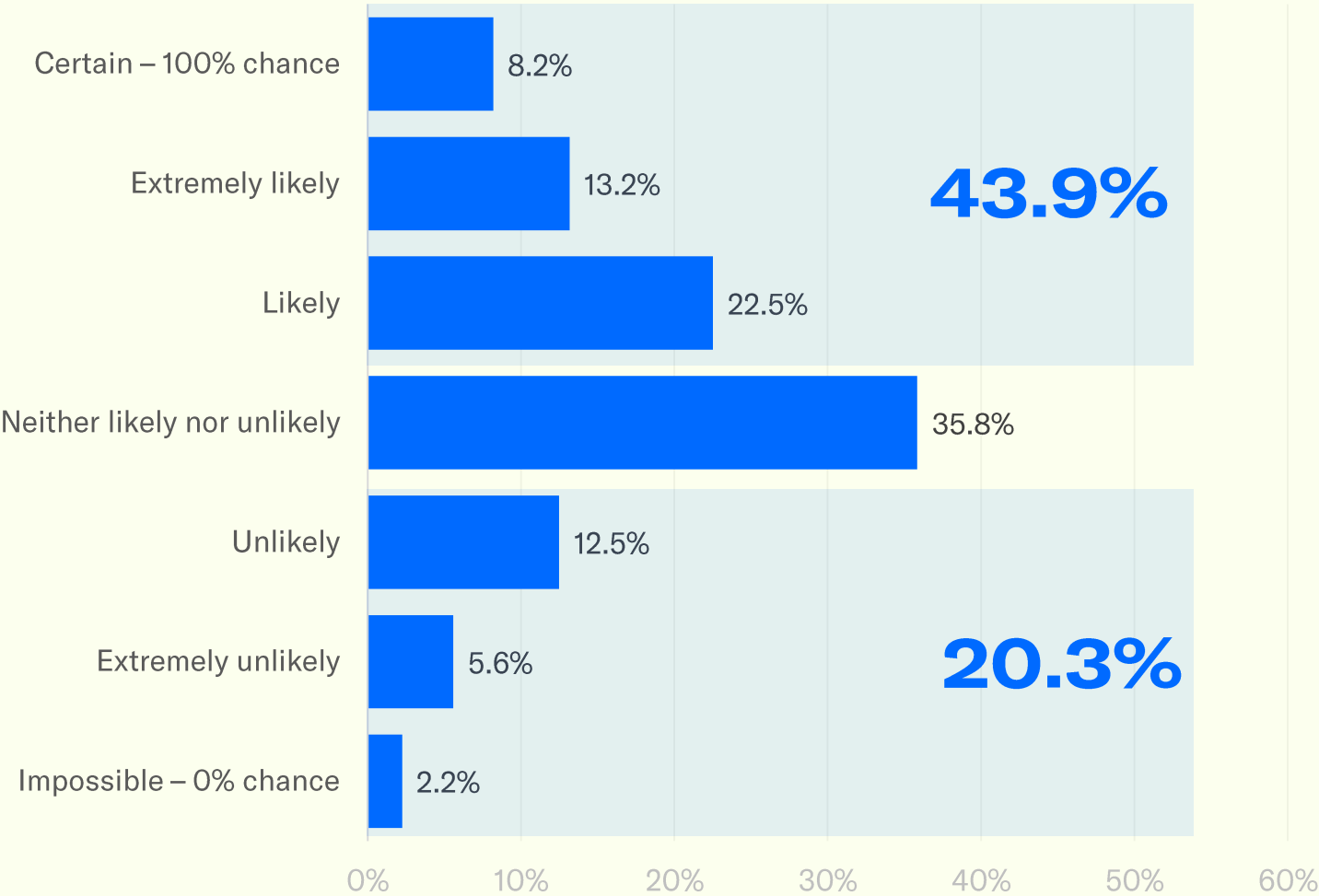
The relevancy of traditional media sources (like ABC, Fox News, NBC, Wall Street Journal) will decline.

Future Partners

By a 2-to-1 ratio, travelers feel traditional media sources will wane in relevancy.

Statement:

The relevancy of traditional media sources (like ABC, Fox News, NBC, Wall Street Journal) will decline.





Prediction #5

**Modern employment and
work options will
encourage more travel.**



Will flexible employment options will drive more travel?

Statement:

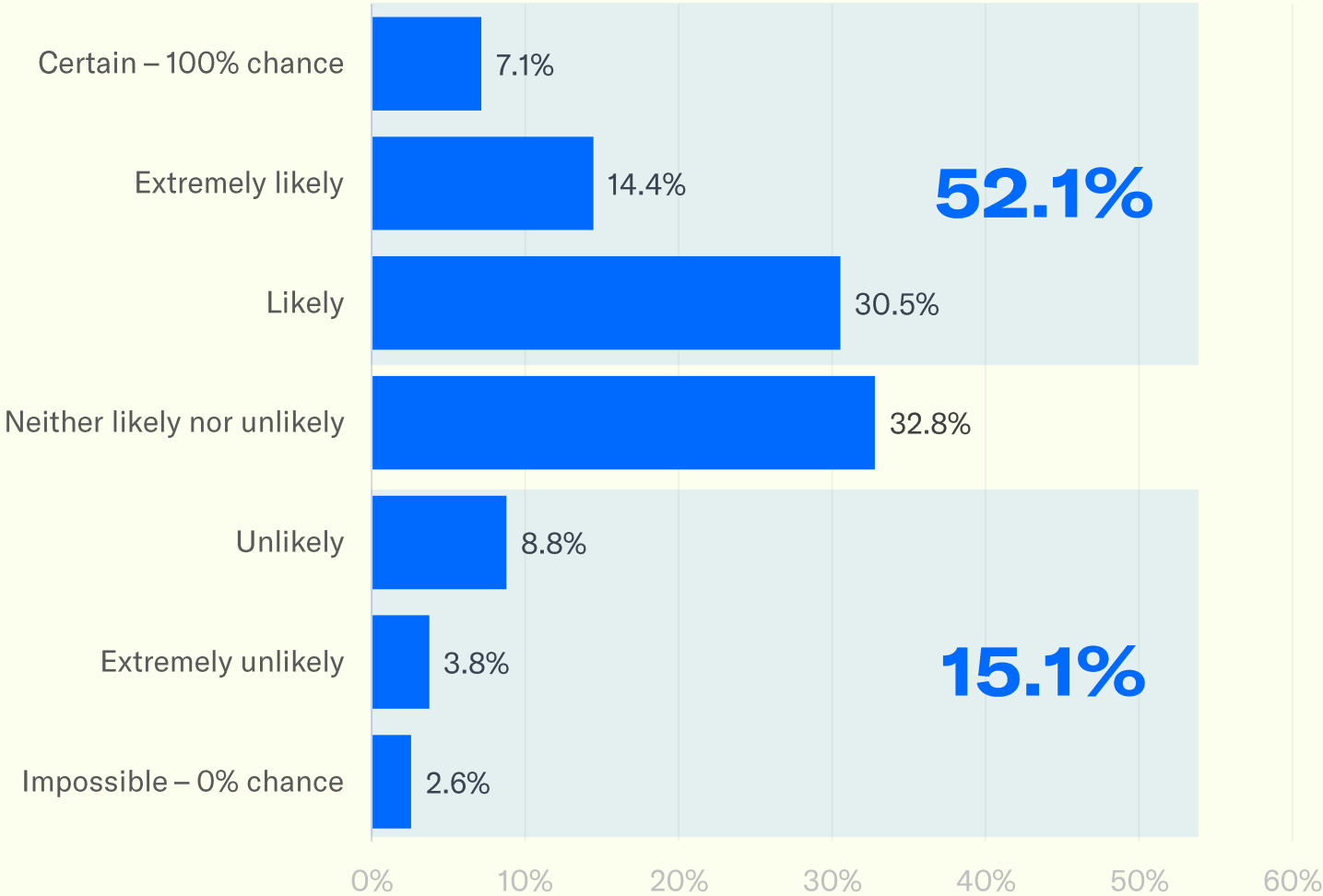
Flexible work options, like remote or hybrid employment, will inspire people like me to take more leisure trips.

Future Partners

More than half of American travelers see workplace flexibility as a catalyst for more travel.

Statement:

Flexible work options, like remote or hybrid employment, will inspire people like me to take more leisure trips.





Prediction #6

**2025 will be
a great year!**



Stepping outside our comfort zones

Statement:

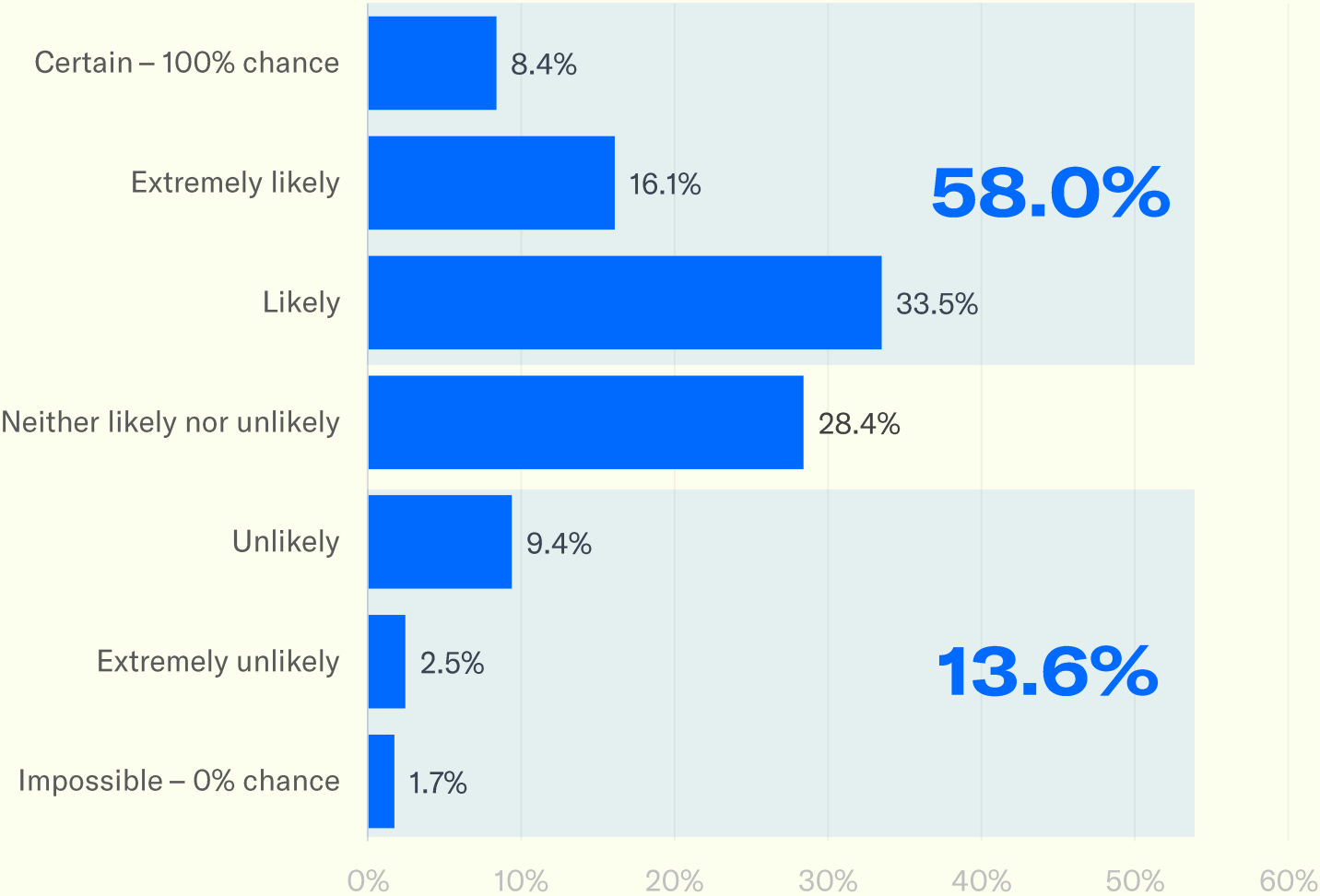
I will use travel as an opportunity to step outside my comfort zone.

Future Partners

A significant number of Americans will use travel as a way to step outside their comfort zone this year.

Statement:

I will use travel as an opportunity to step outside my comfort zone.





Dream trips on the rise

Statement:

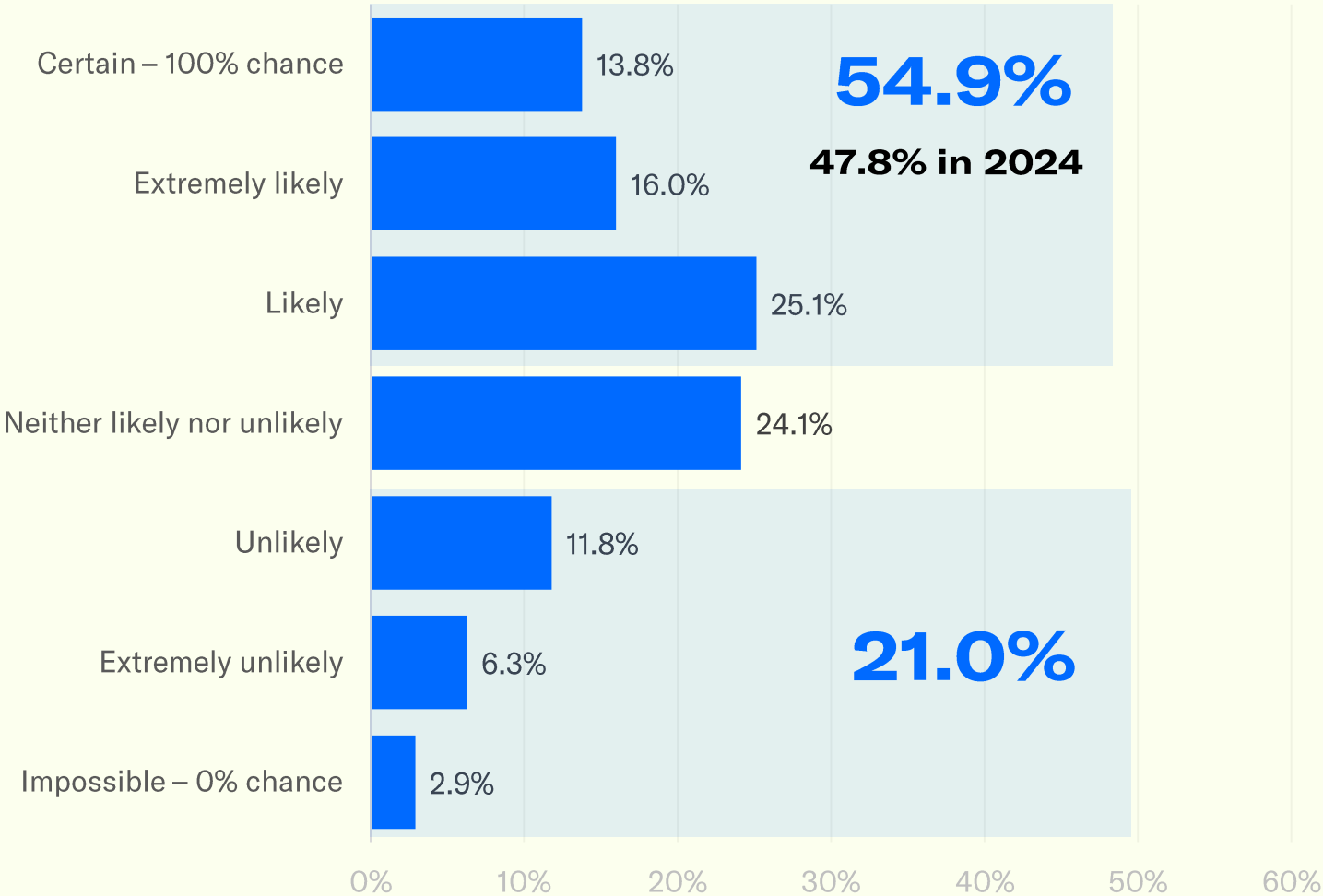
I'll take a dream trip to somewhere exciting in 2025.

Future Partners

A growing number of travelers see it as likely that they'll take a dream trip to somewhere exciting in the next year.

Statement:

I'll take a dream trip to somewhere exciting in 2025





2025 is looking good!

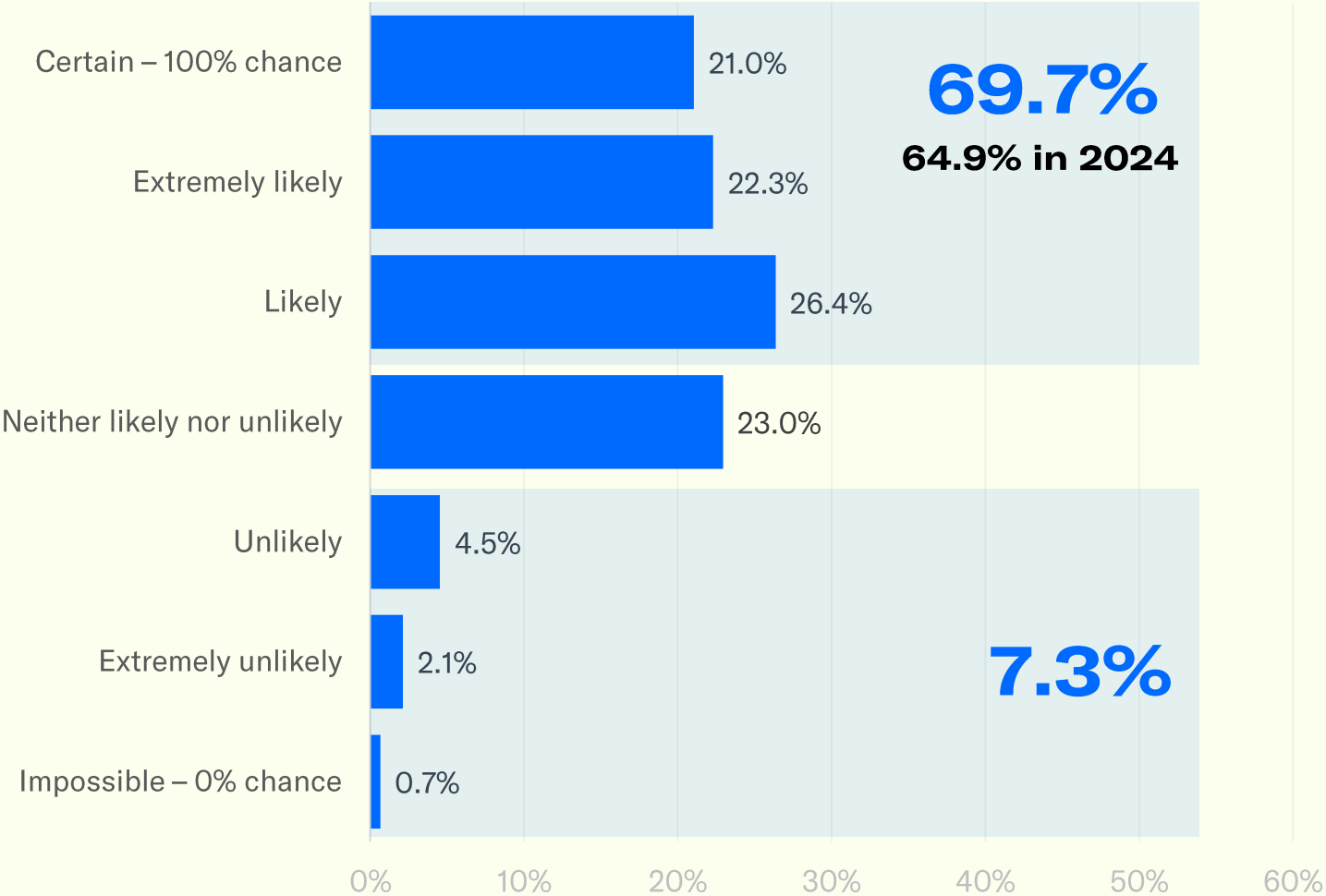
Statement:

2025 will be a great year for me.

Future Partners

Americans are highly optimistic about 2025.

Statement:
2025 will be a great year for me.



Travel Nostradamus



American Travelers Likely Predictions for 2025

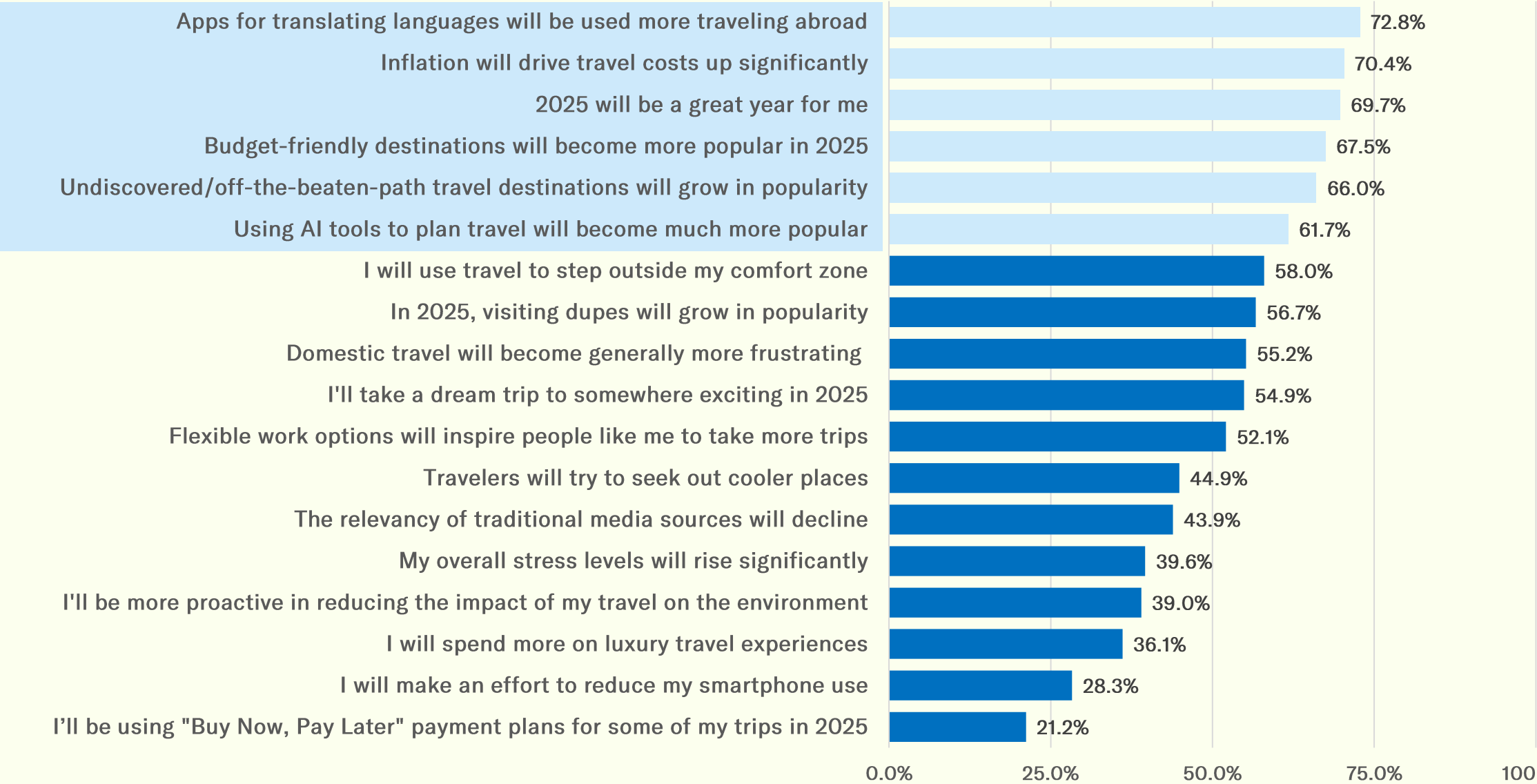
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

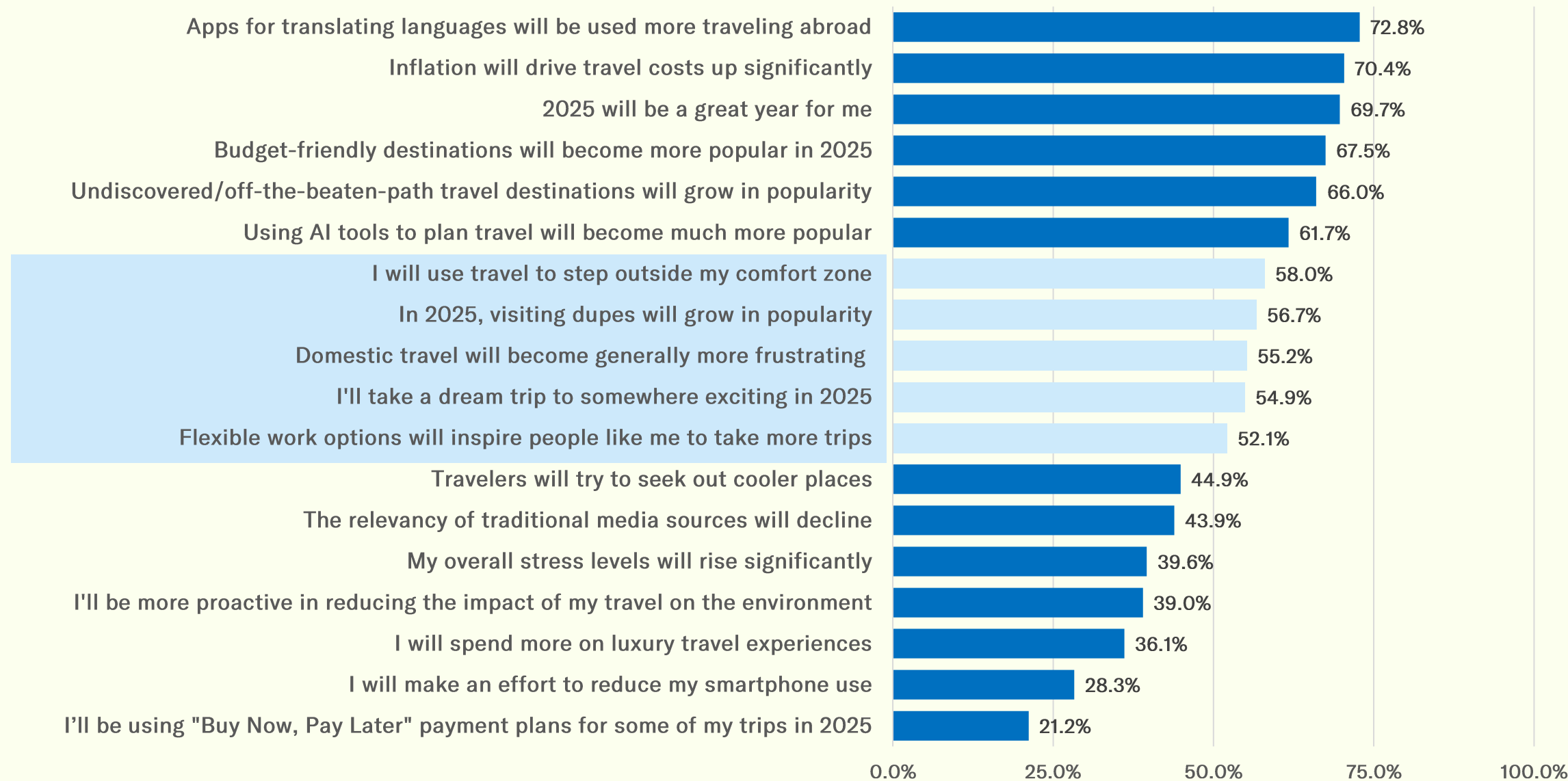
Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

American Travelers Likely Predictions for 2025

Top 3-Box Score (Likely, Extremely likely or Certain - 100 % chance)



Some statements are shortened here to fit into chart.

A woman with long brown hair, wearing a brown headband, an orange jacket, and a large yellow backpack, is hiking on a rocky trail. She is looking off to the side with a smile. The background features a dense forest of evergreen trees and a mountain range with patches of snow or light-colored rock under a clear sky.

Future Partners

**We asked
Leisure Travelers...**



David Reichbach

Vice President of Development
dreichbach@futurepartners.com

Thank You!



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