



# — the traveler's journey

South Dakota Tourism Conference

Lawrence & Schiller





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# the traveler's journey

## Evolving Travel Audiences

- How population and societal trends are changing travel audiences
- The impact of economic factors on travel plans

## Changes in Travel Planning & Inspiration

- How marketing inspiration has changed
- Influence of technology on travel planning
- Impact of online culture on content expectations



# audience & travel data

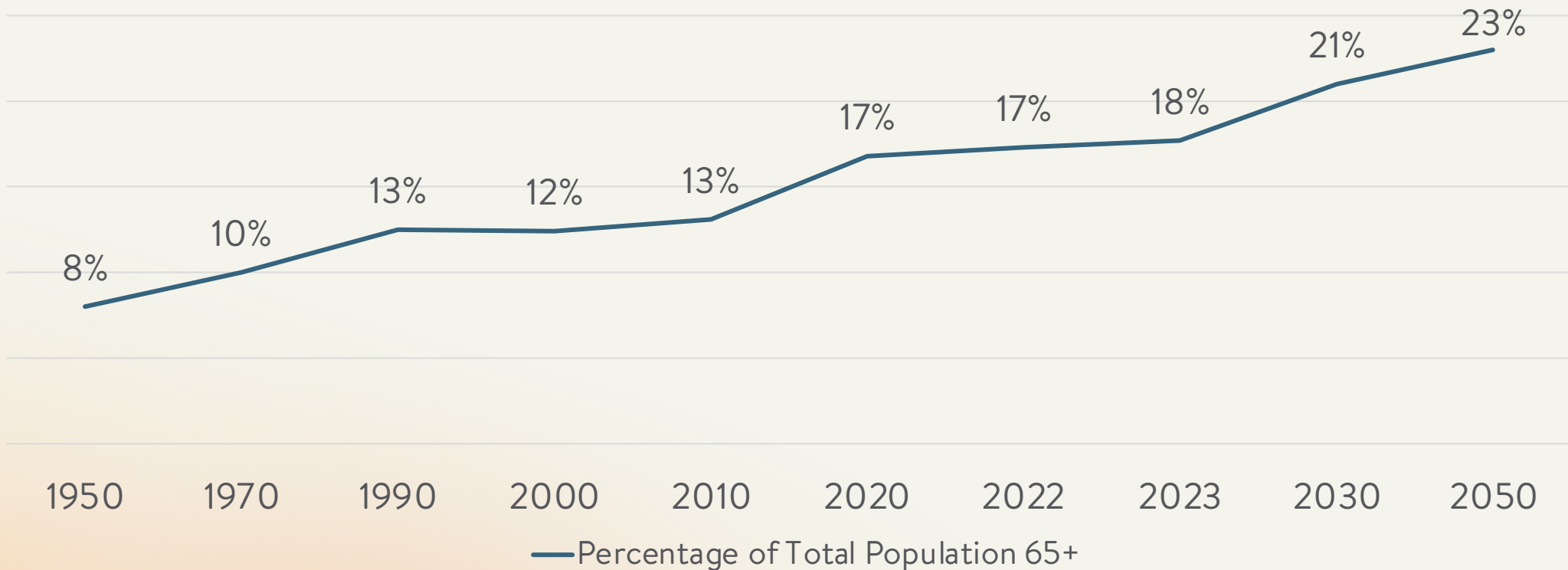
- 2025 L&S Travel Research
- U.S. population data
- Travel trends
- Secondary tourism research
- Media consumptions habits
- Emerging technology usage

# demographic changes



# % of population over 65

The mature population is predicted to continue to grow, having a significant impact on society and consumer spending.







# distribution of wealth

## Age x Percentage of Total Wealth\*

Under 40: \$11.18 Trillion, 7% of total wealth

40 – 54: \$33.40 Trillion, 20% of total wealth

55 – 69: \$69.60 Trillion, 42% of total wealth

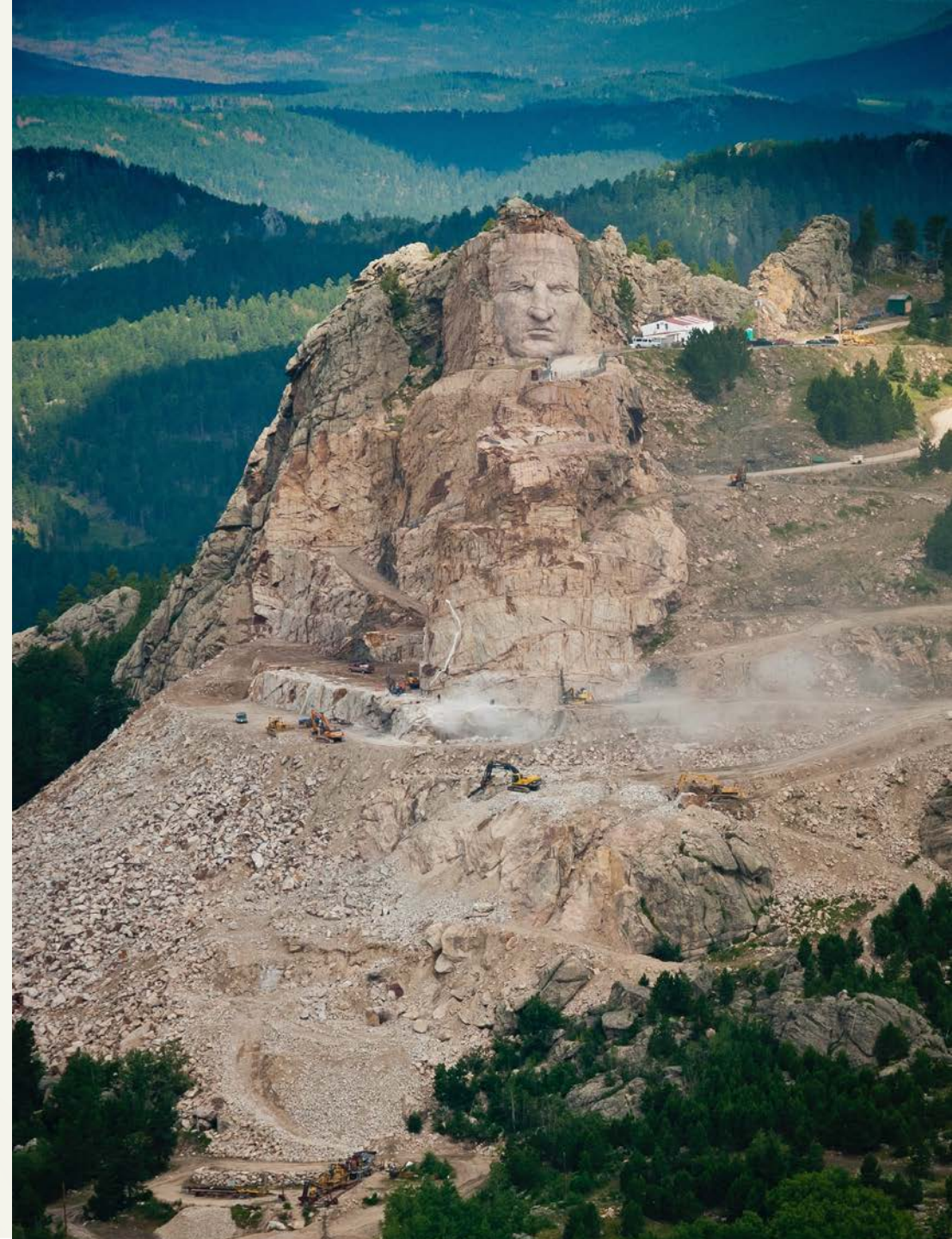
70+: \$53.08 Trillion, 32% of total wealth

Americans over 55 years old, account for 74% of the country's wealth, offering these age segments more stability and financial confidence

# planning to travel

*“70% of older adults are planning trips in 2025...(participants) indicated they expect to take, on average, **3.6 trips** next year (2025).”*

-AARP, 2025 Travel Trends







# mature traveler opportunity

## Opportunity

- The mature travel audience is growing substantially
- The mature audience is more stable financially and less likely to have to adjust travel
- Travel is a priority for this audience

## Challenges

- Do our offerings align with the audiences' trip preferences?
- How do we stand out from competition?
- Are we equipped to service an increase in older travelers?

# **societal shifts**





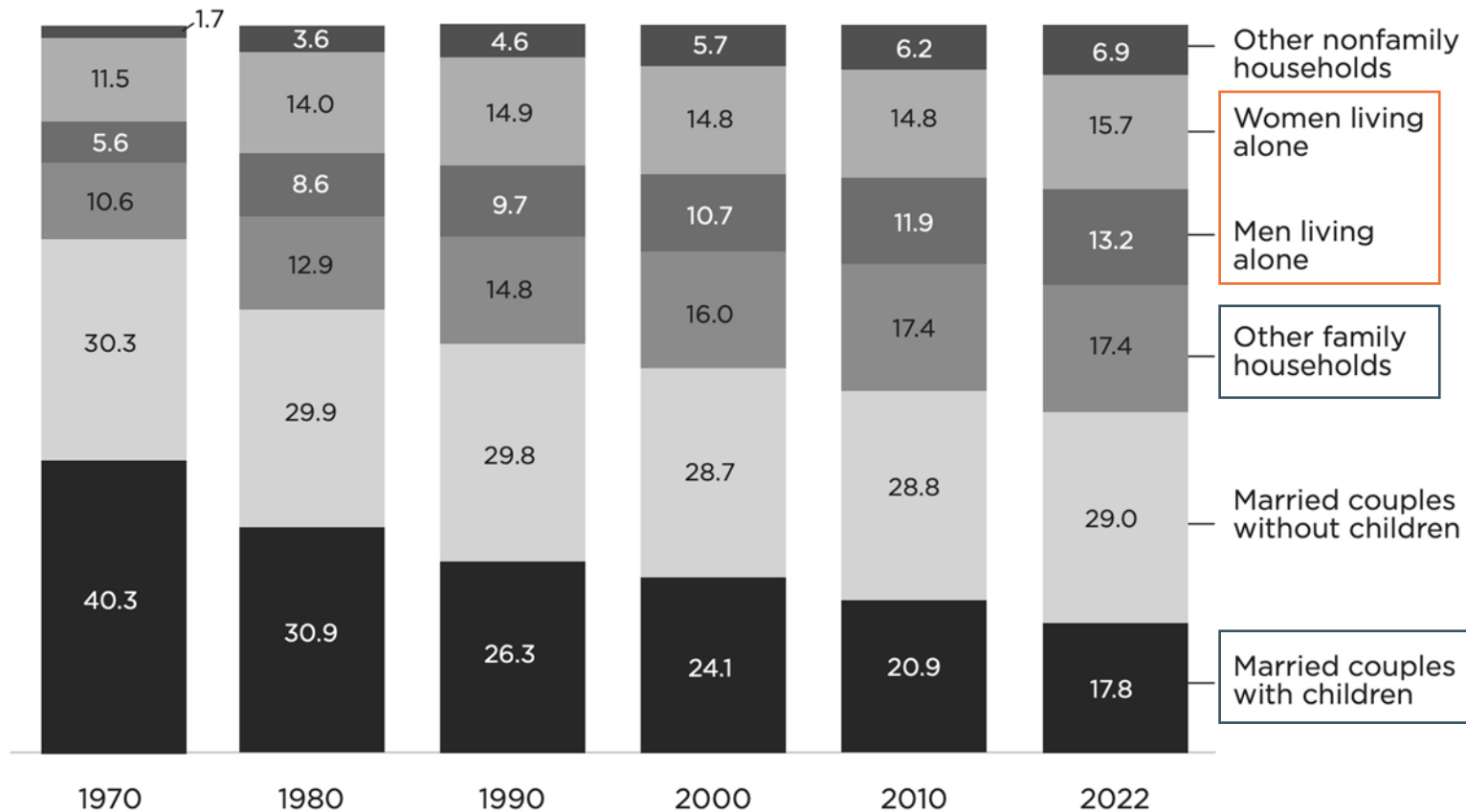


**families are evolving  
and will look different**

# household shifts

**Households by Type: 1970 to 2022**

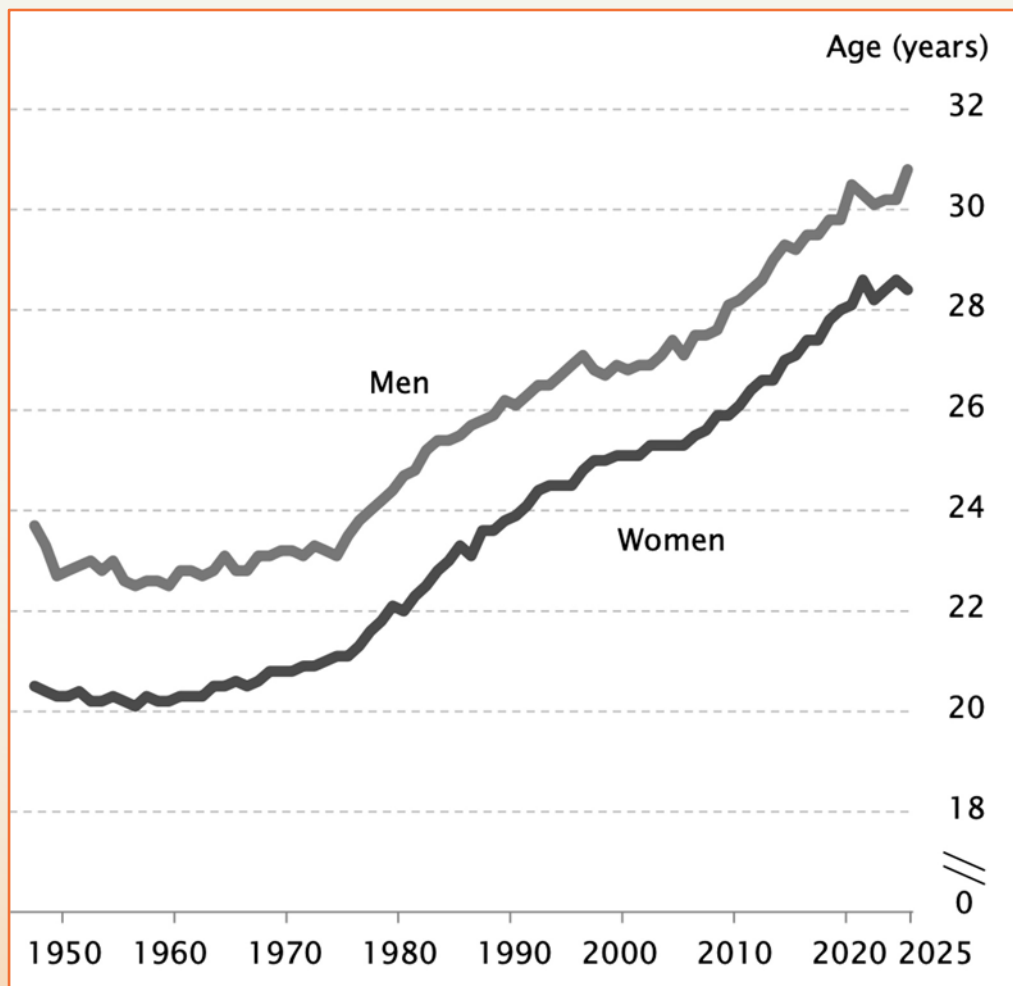
(In percent)



Household composition has shifted the last 50 years – more single adults and fewer couples with children

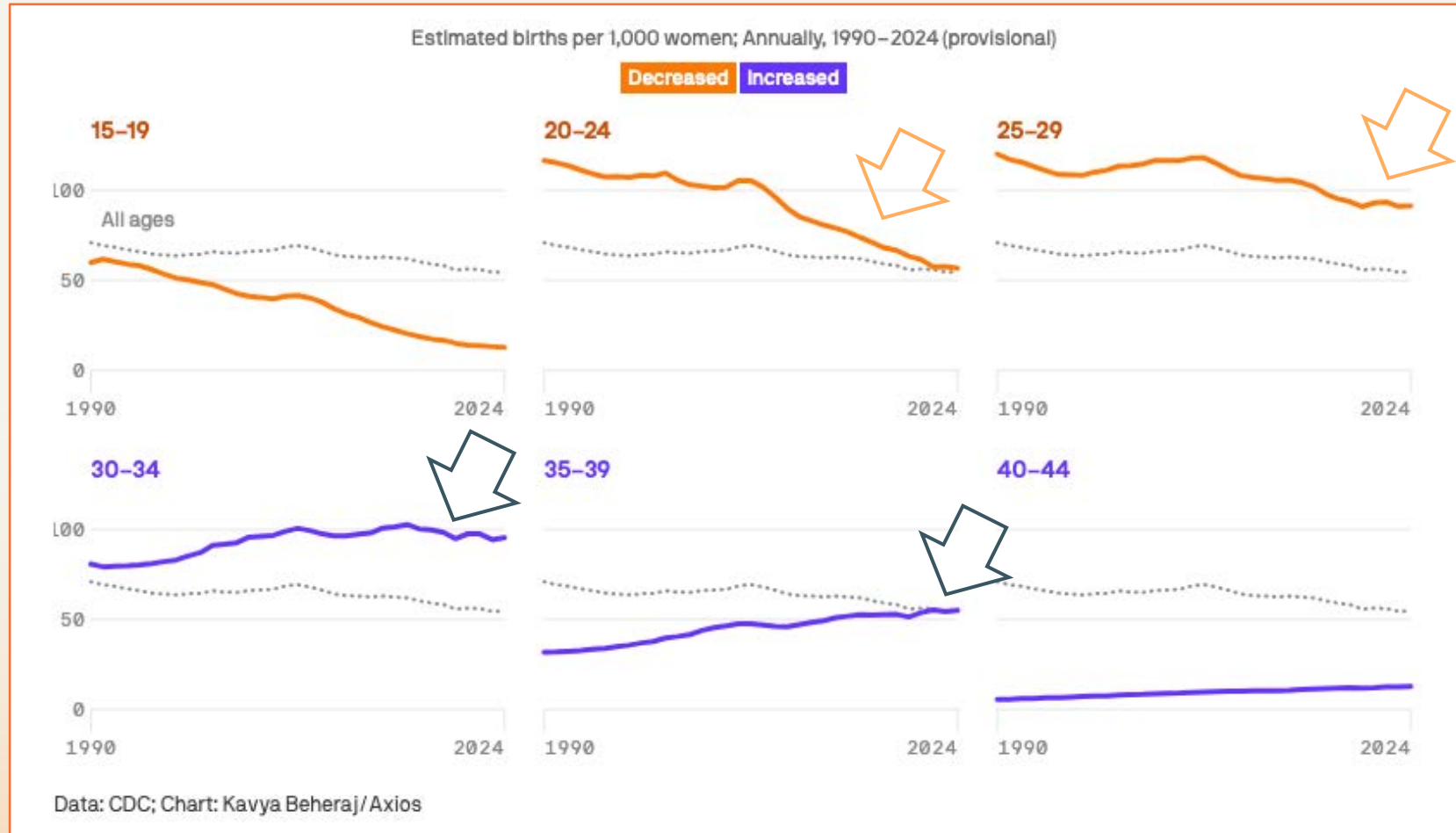


# age of marriage



Average Age of First Marriage		
	1970	2025
Women	21	28
Men	23	31

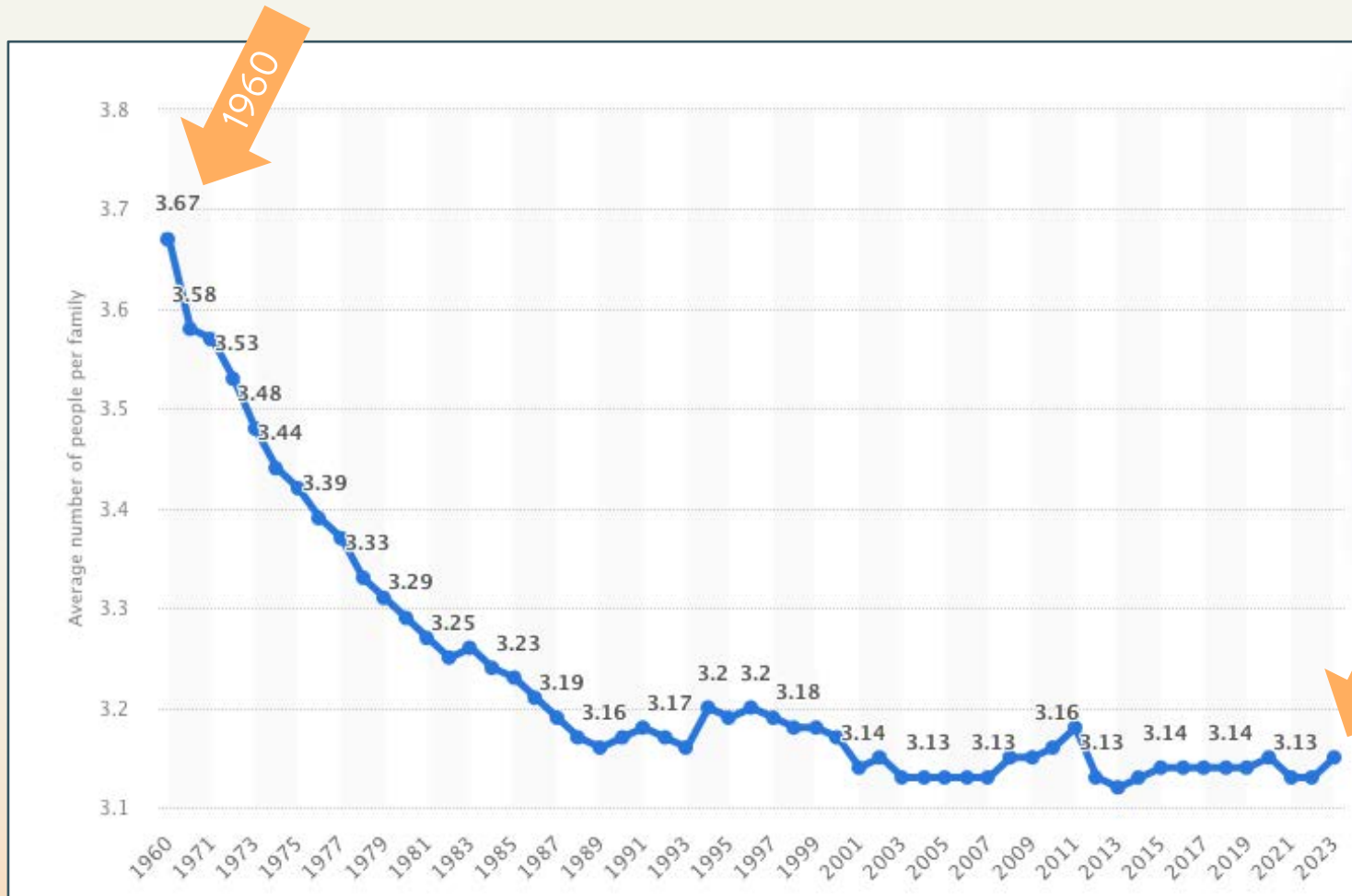
# starting families



The average age at which women have their first child has increased – starting families at an older, more established lifestage

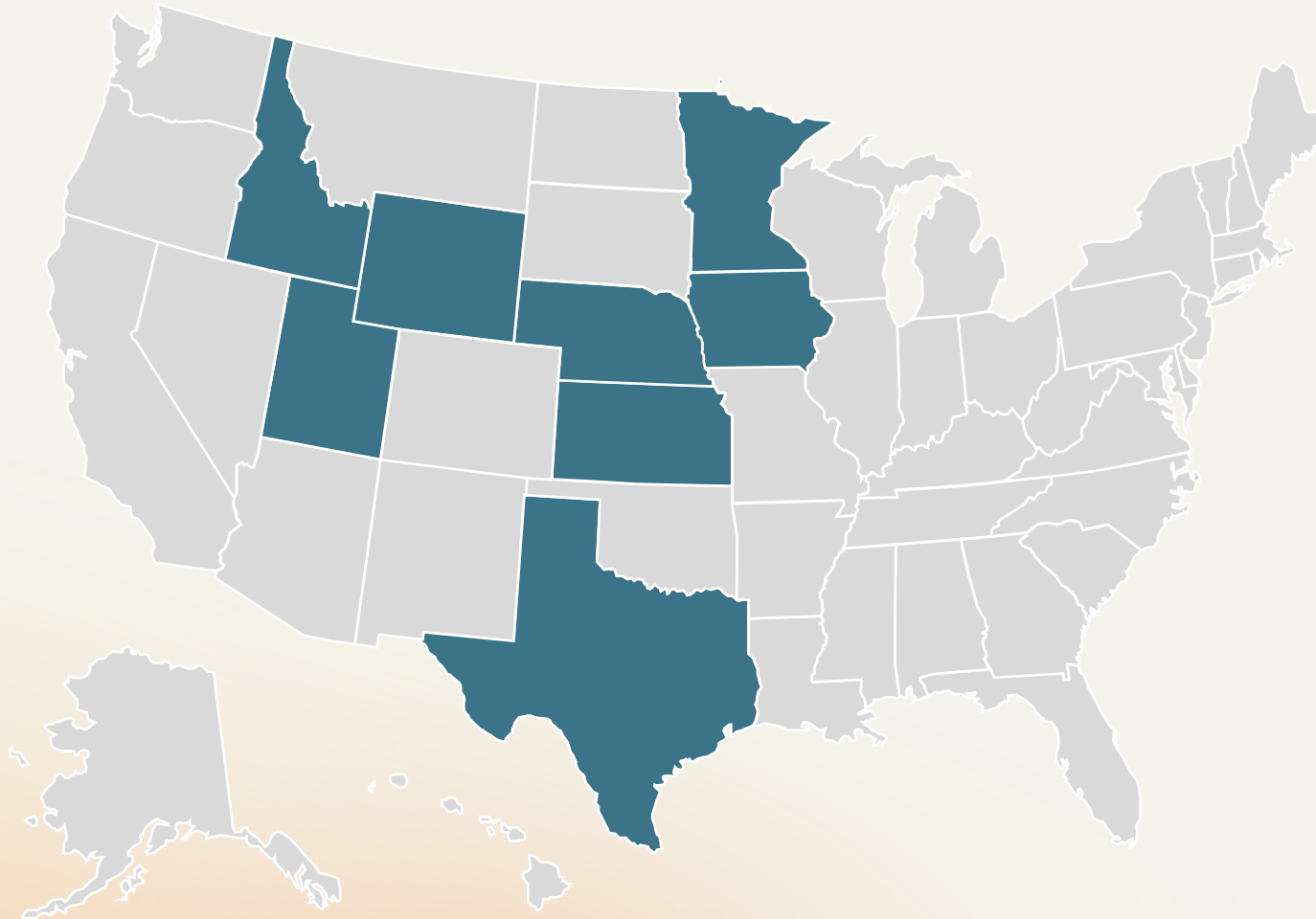


# decreasing family size



In 1960 the average family size was nearly 4, but since then has decreased as was just over 3 in 2023

# regional differences



While the nuclear family is on the decline nationally, there are states that offer opportunity for the family audience



# audience ripple effect



## Family Audience

- Older, and in a more stable life stage
- Potential for a more affluent travel audience
- South Dakota aligns with families needs
- Adjust markets to target states/regions with above national averages



## Group & Solo Travel

- Young people will still travel but in different ways
- Potential for an increase in friend group and solo travel
- Leverage unique SD experiences to align with audience preferences



# evolution of audiences

Changes in the United State's population are impacting how we need to think about common travel audiences

## **MATURE TRAVELERS**

The segment is growing and continues to be a significant opportunity for destinations to the volume and wealth of the audience.

## **FAMILIES**

Parents will be older, with smaller families, but potential more affluent and established when starting families

## **FRIEND GROUPS**

People are staying single longer, opening the possibility for increased friend group travel.

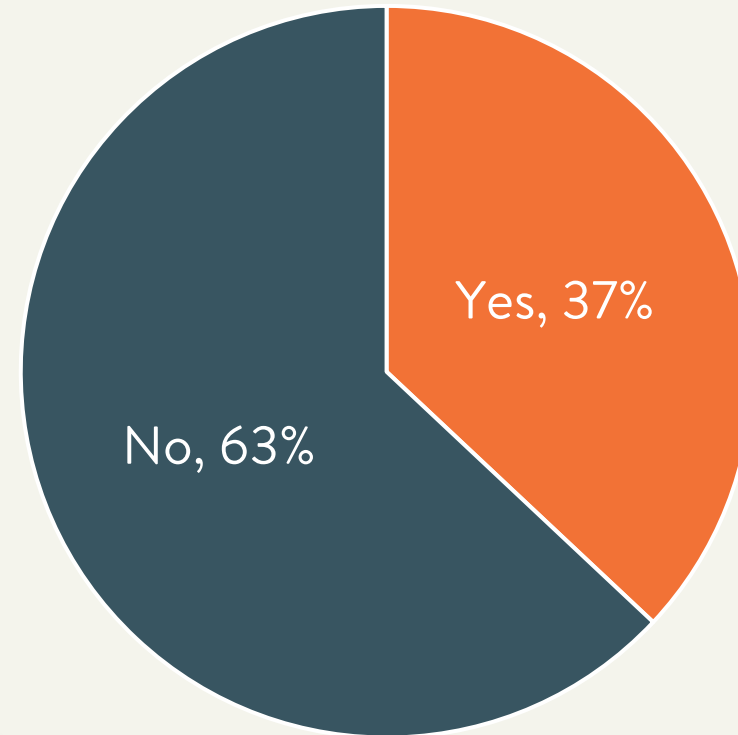
# **the economy & travel**



# shifted travel plans

**Did you change any of your travel plans in 2025 because you had concerns about the economy or your personal financial situation?**

Over a third of participants reported adjusting travel in 2025 to account for financial concerns







# who was shifting plans

Did you change any of your travel plans in 2025 because you had concerns about the economy or your personal financial situation?

Yes - Changed Travel Plans in 2025 x Children in the Home

**37%**

All Participants

**50%**

Kids in HH

**31%**

No Kids in HH

Participants with children in the home reported changing travel plans at a significantly higher rate than those without children in the household

# who was shifting plans

Did you change any of your travel plans in 2025 because you had concerns about the economy or your personal financial situation?

Yes - Changed Plans in 2025 x Participant Age

**49%**

Age: Under 55

**22%**

Age: Over 55





# how travel was adjusted

Which of the following best describes how you changed your travel plans? (Multiple Select)

- Explore free attractions
- Limit eating at restaurants on trips
- Look for deals or discounts
- Not take a leisure trip
- Stay in more affordable hotels or lodging
- Take fewer trips
- Take shorter trips
- Travel close to home
- Travel during the offseason
- Other

# how travel was adjusted

How Travel Changed x Participant Age

**22%**

Take Fewer Trips

**20%**

Travel Close  
to Home

**14%**

Take Shorter  
Trips

**11%**

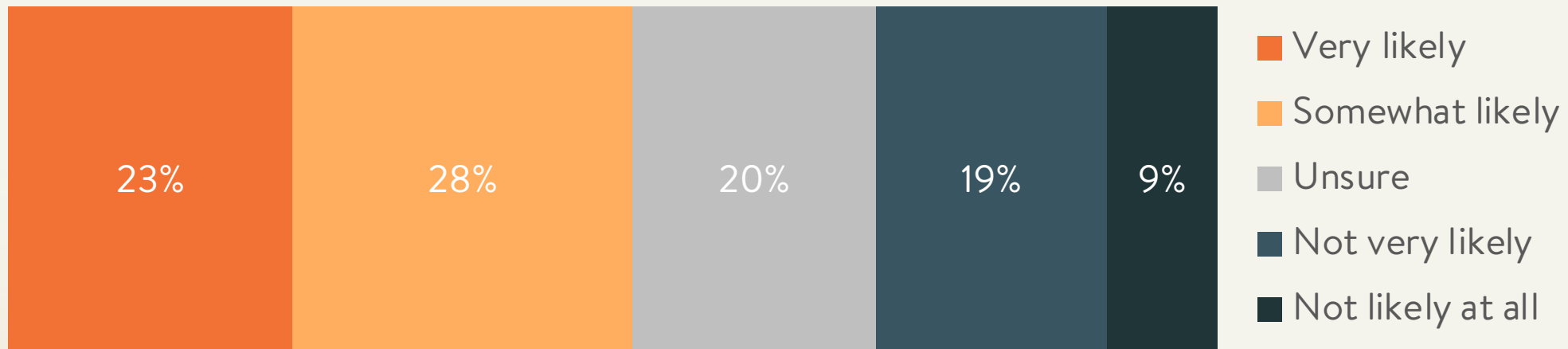
Look For Deals  
or Discounts

Strategies for adjusting travel plans are consistent across age segments.  
People will still travel, but it will look different than expected.



# looking forward

Thinking ahead, how likely is it that concerns about the economy or your personal financial situation will change your travel plans in 2026?



As a whole, the participant pool expressed uncertainty about their future travel plans



# traveler sentiment

## Challenges

- Travelers may have less financial flexibility
- Consumers have already started adjusting travel plans, and many are planning to continue this behavior
- May be more hesitant to commit to more expensive trips and experiences

## Opportunity

- Even with economy uncertainty, consumers are finding ways to travel
- Identify how South Dakota's strengths can align with travelers' evolving needs
- Consider how we can optimize our messaging by market and audience

**how & when does  
planning begin**



# foundational needs

What travelers want from a vacation before they even begin to consider destinations



Relaxation



New Experiences



Family & Friends



# decision timeline

Destination consideration happens early, 5+ months ahead of travel – may have a list of options to choose from and then pick based on situation

	Jan	Feb	March	April	May	June	July	Aug	Sept
In-Market	-	-	-	9%	16%	31%	24%	12%	8%
Destination Consideration	37%	16%	20%	11%	6%	5%	3%	1%	1%
Travel & Accommodation Booking	15%	19%	23%	19%	11%	8%	3%	2%	0%

42%

# right message, right time

How partners can build off each other and create a seamless traveler messaging journey

	Jan	Feb	March	April	May	June	July	Aug	Sept
State	Why South Dakota?								
Regions/Communities		Where in South Dakota?							
Attractions & Lodging				What I will do in South Dakota?					

**how do we  
inspire & engage  
audiences?**





# the path to travel





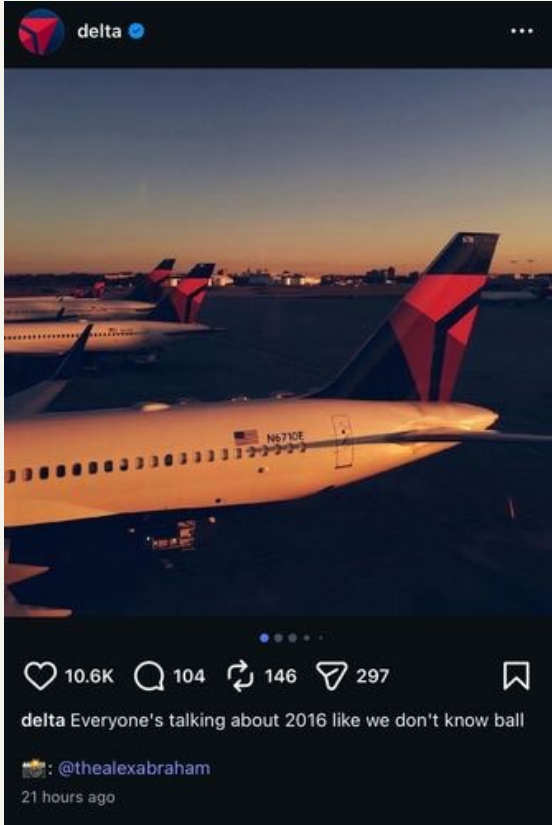
# the travel funnel



# how travel actually goes



**“2026 is the new 2016”**

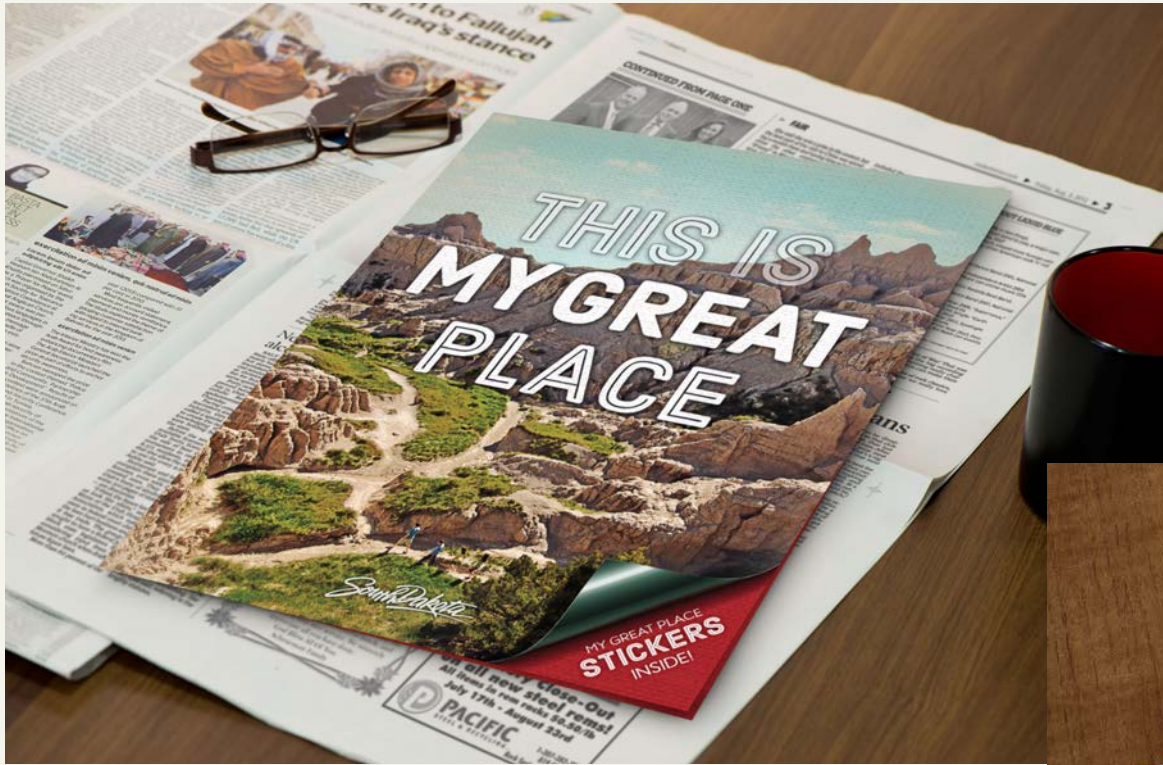


**so let's throw it back  
with travel south dakota**















**GOOD  
HOUSEKEEPING**



**MidwestLiving**



**Parents**





# today's inspiration



**8%**

Billboards  
or Posters



**33%**

Travel Blogs or  
Websites



**29%**

TV, Movies or  
Streaming



**13%**

Podcasts



**43%**

Social  
Media



**23%**

Online  
Video Ads



**15%**

Magazines or  
Newspapers



**7%**

In-Person  
Brand Events



**60%**

Recommendations  
from Family or  
Friends



**10%**

Mail from  
Destination



**17%**

Travel  
Agents

Outside of word of mouth, trip inspiration is overwhelmingly driven by digital and mobile-first channels



# 2016 → 2026

There are constants, but a lot has changed in the last 10 years – with how we consume media and plan travel.

**technology  
growth**



# mobile rules

Smartphones have become the default “remote control” to our daily lives:

- Communication
- Shopping
- Banking
- Navigation
- Entertainment
- Work
- Healthcare



# mobile market share

2016



**39%**

2026

**53%**



**27%**

**45%**

# mobile is strong with travel sd

2021

60%

2026

75%





# impact on travel

Mobile devices are the central hub where you can plan travel from start to finish and share your experience.



People can research & plan on the go, no longer confined to home or travel agents



Travelers more comfortable making purchases on mobile devices, allowing for last minute bookings



Real-time information gives travelers more flexibility on their trips



# planning resources

Travelers are heavily relying on digital or online resources during their trip planning.

What Type of Resources Would You Use to Plan Your Summer Trip?	
Destination Websites	51%
Reviews on Travel Websites	37%
Online Travel Agencies	44%
Travel organizations' websites	30%
Travel agent	16%
AI Tools	22%
Digital visitor guide	26%
Printed visitor guide	19%




# planning resources


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# changing search

 south dakota vacations

AI Overview



South Dakota vacations center around the iconic Black Hills & Badlands, featuring **Mount Rushmore**, **Crazy Horse Memorial**, stunning drives like **Needles Highway** in **Custer State Park**, and historic **Deadwood**, with activities from scenic hikes, wildlife viewing (bison!), and water recreation on the Missouri River lakes, best visited late spring to early fall for full access, though May/September offer fewer crowds.

Top Attractions

- **Mount Rushmore National Memorial:** The iconic presidential faces carving into the granite.
- **Badlands National Park:** Otherworldly landscapes, hiking, and wildlife viewing.
- **Custer State Park:** Drive the Wildlife Loop, explore Sylvan Lake, hike trails, and see bison.
- **Crazy Horse Memorial:** A massive mountain carving honoring Native Americans.
- **Deadwood:** A historic, wild-west town with casinos, museums, and ghost stories.
- **Wall Drug:** Famous roadside attraction with free ice water and souvenirs.

Activities & Experiences

- **Scenic Drives:** Needles Highway & Iron Mountain Road in Custer State Park.
- **Hiking:** Trails in Badlands and Custer State Park (like Cathedral Spires).
- **Water Sports:** Boating, fishing, paddleboarding on Missouri River lakes (Oahe, Sharpe).
- **History & Culture:** Explore pioneer history, Laura Ingalls Wilder sites, and Native American heritage.

15 Most Beautiful Places To Visit In South Dakota - GlobalGrasshopper

15 Most Beautiful Places to Visit in South Dakota  
\* Custer State Park. ... \* Deadwood. ... \* ...

Global Grasshopper

THE 15 BEST Things to Do in South Dakota (2026) - Tripadvisor

Top Things to Do in South Dakota. Check out must-see sights and activities: Mount Rushmo...

Tripadvisor

Best Things To Do In South Dakota (Our Top 10)

it really makes you marvel at a time when Native Americans were forced to reckon with the...

YouTube

Show all



What can I help with?

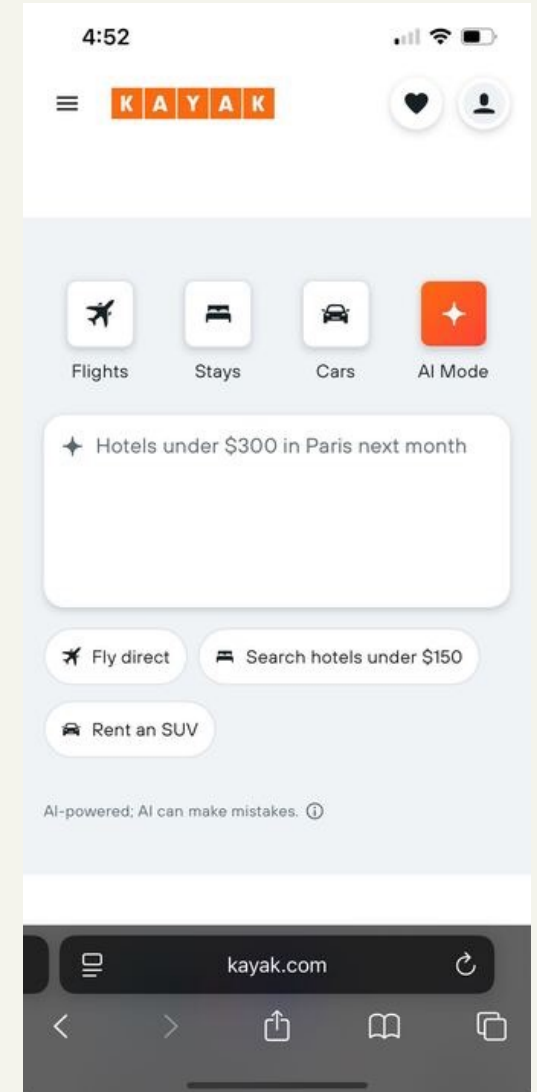
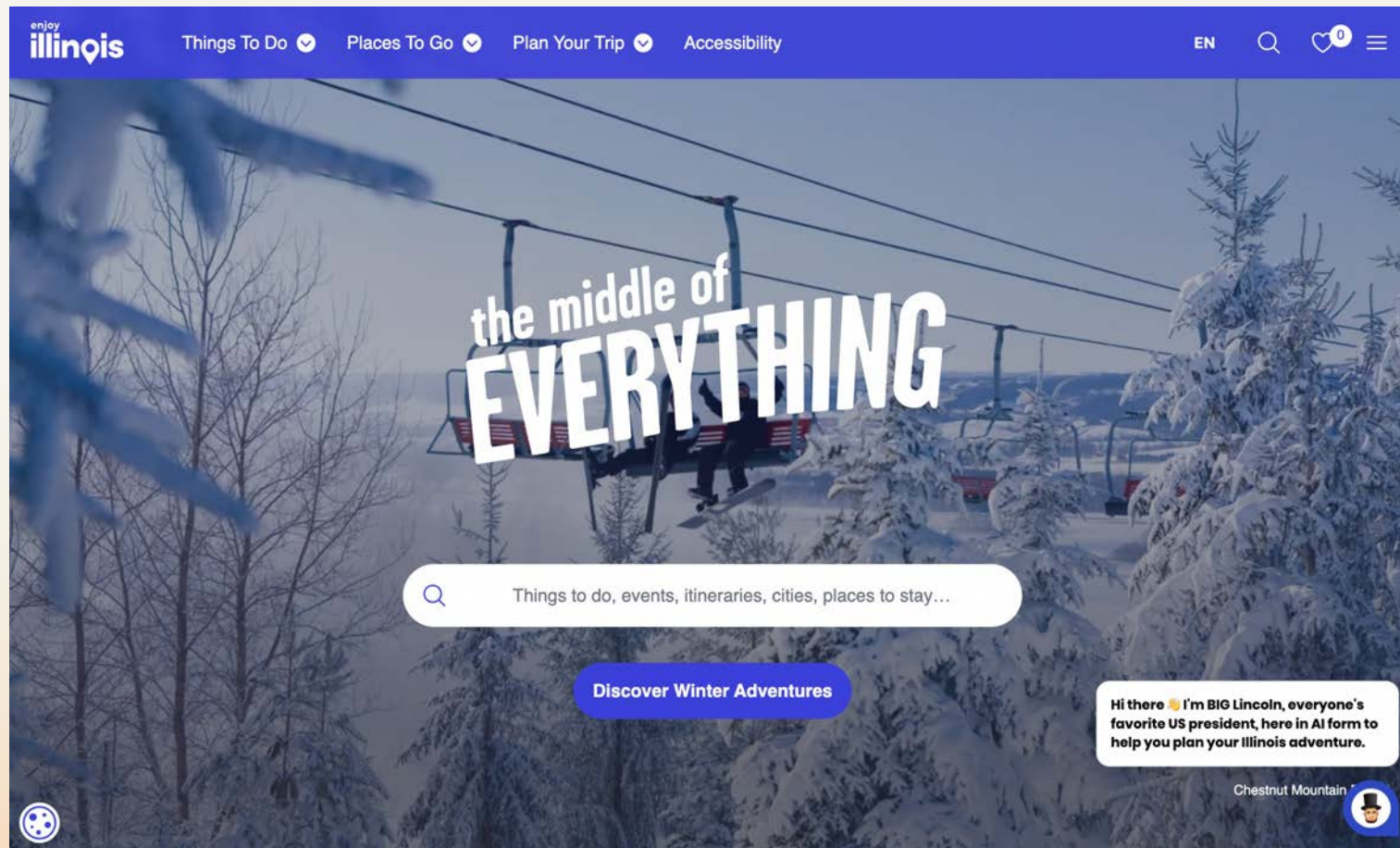
+ Ask anything



 Company knowledge



# custom ai in travel



# how travelers use ai

Travelers are using AI primarily as a discovery and planning assistant, not yet as a full booking tool.

68%

Learning about  
popular  
attractions

57%

Creating trip  
itineraries

39%

Finding lodging

29%

Finding flights

28%

Booking travel



# what this means for you:

Consider how you can optimize your efforts for mobile and AI.



Create a mobile-friendly website



Update content frequently



Evolve search strategies to include AEO/GEO



Audit all types of content including paid, shared, earned & owned

# **cultural shifts**



# rise of social media

Mobile devices have made social media platforms integrated into our daily lives.



Stay connected with our friends & family regardless of location.



Information sharing is democratized; anyone can put information on these platforms.



Platforms have evolved into entertainment & content hubs.





# popularity of travel content

Instagram

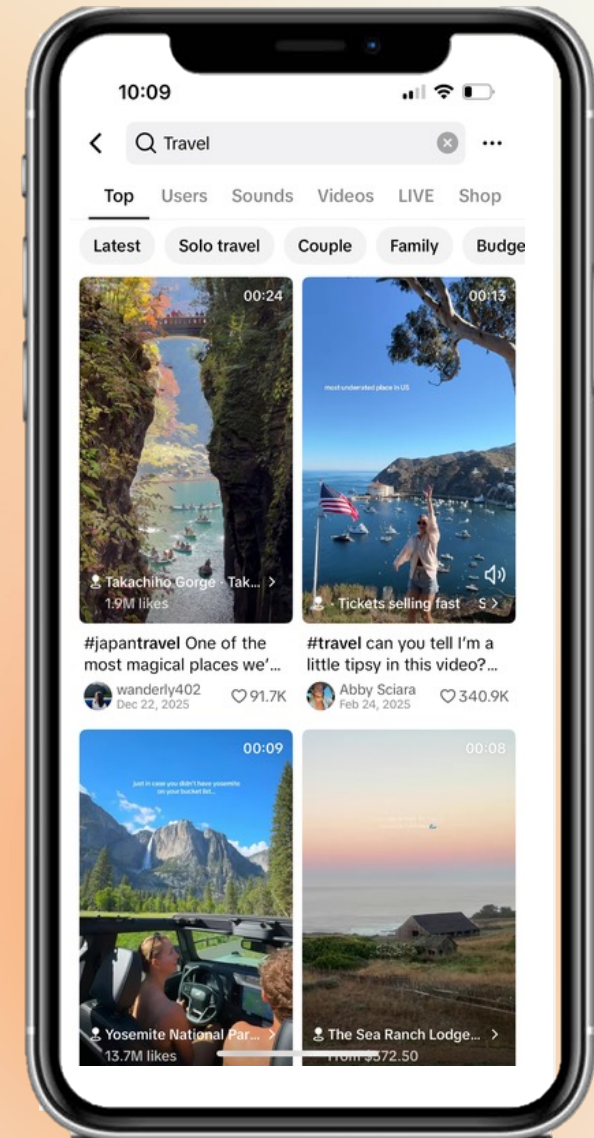
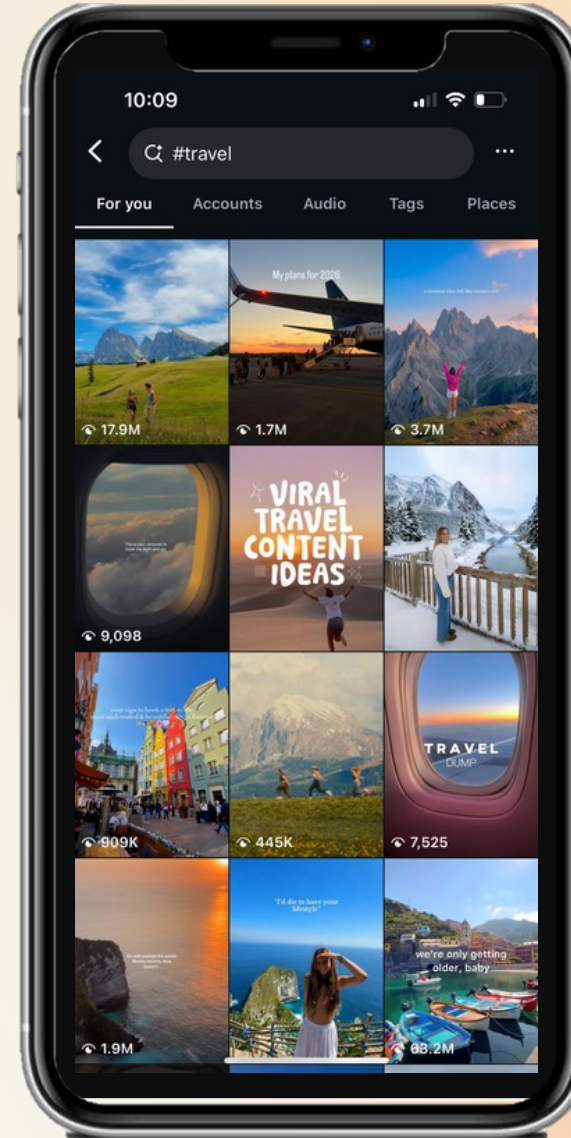
624M

Posts related to travel

TikTok

74.4B

Views of Content with  
the hashtag "travel"

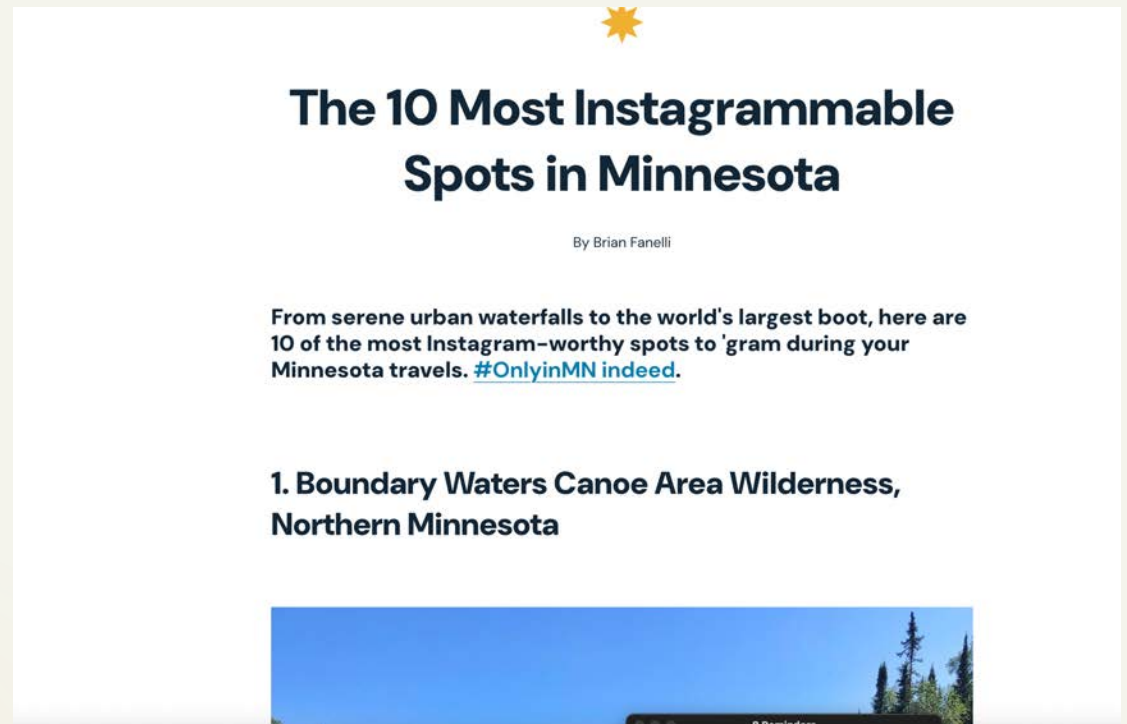


# **“instagrammable”**

Anything that’s visually appealing and worth  
sharing on Instagram

# influencing travel

Studies have found 40% of Millennials pick travel destinations based on how Instagrammable the pics will be on

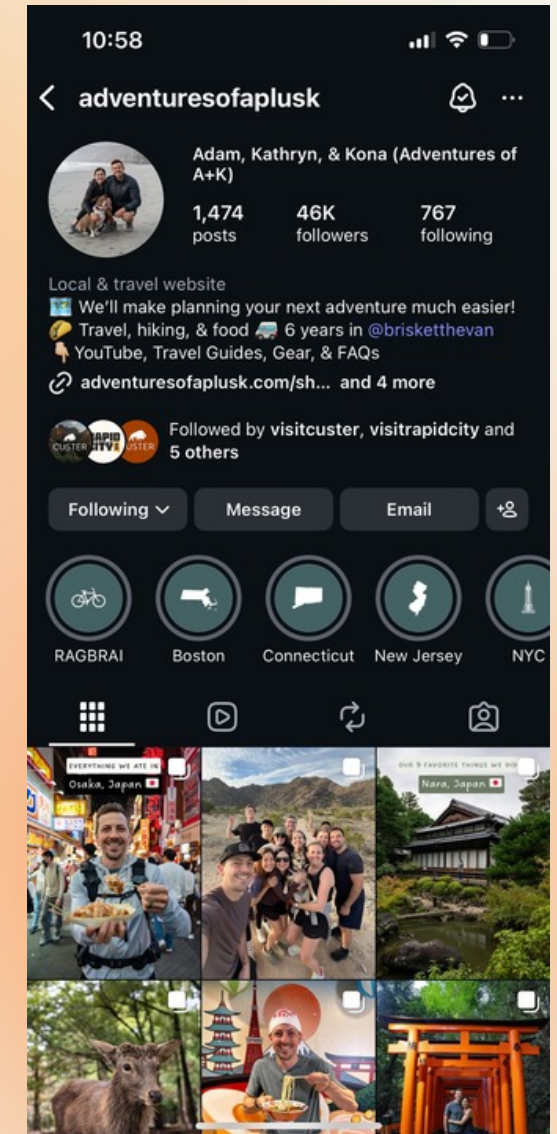




# travel influencers

73% of travelers say that influencer recommendations have led to booking decisions

- Hotels (31%)
- Domestic Trip (30%)
- Tour/Activity (24%)
- Specific Destination (24%)
- Air Travel (23%)
- International Trip (21%)
- Vacation Rental (20%)



# shift to everyday influencer

Democratization of social media means anyone can go viral at any point, not just celebrities.



People want to see content creators who are relatable, not aspirational



Nano-influencers (fewer than 5,000 followers) are outperforming mega influencers, sometimes by 3x the engagement



There's a shift from perfectly curated content to unfiltered opinions, behind-the-scenes moments, and insights to personal lives

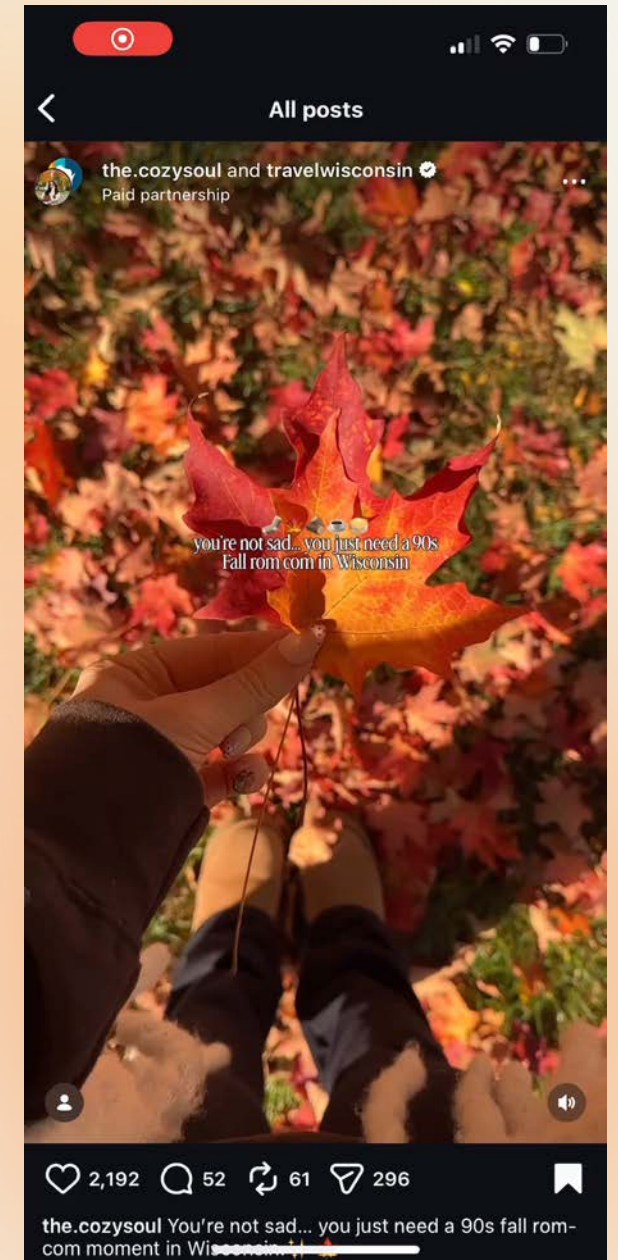
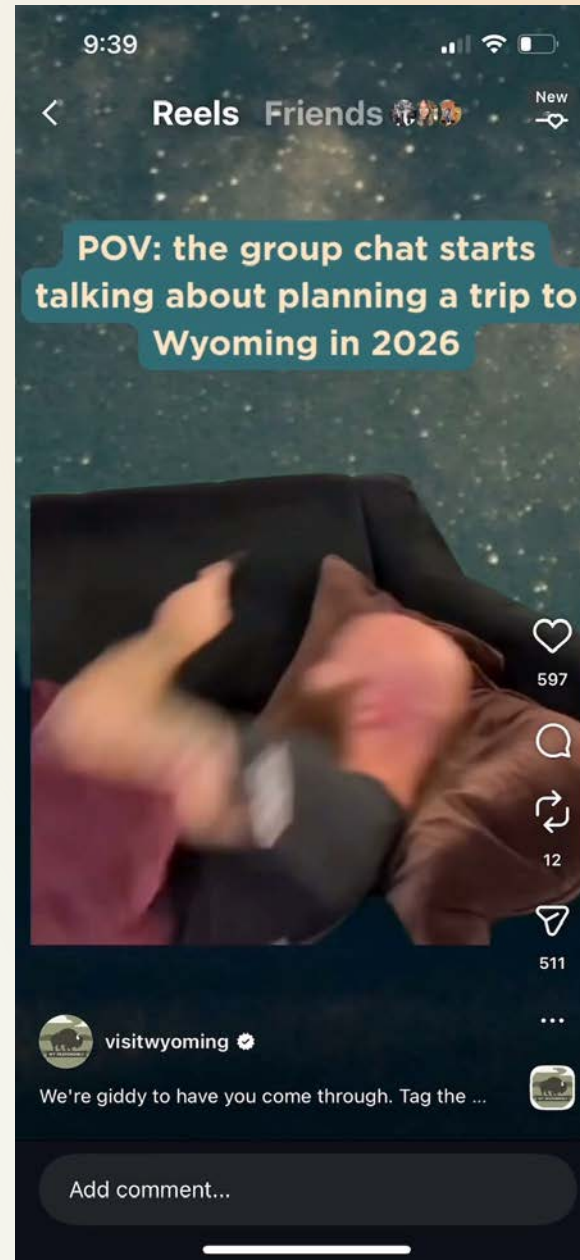




# impact on video

Audiences don't expect studio-perfect content anymore.

- Mobile-first, vertical video
- Raw, unscripted content feels authentic
- A mix of short-form and long-form
- Memes, voiceovers, captions and music are now part of the format



# 1&s studio content

- Content creator network that produces authentic user-generated content for brands
- Social photos, videos and more that have led to stronger engagement across social platforms





# places going viral



# it's not all positive

Newsweek

Nation

World

Lifestyle

Opinion

Rankings

Connect

More

World

Canada

Toronto

Instagram

Selfies

News Article

## Sunflower Farm Forced to Ban Instagrammers After Thousands Flock to Capture Perfect Selfie

PUBLISHED

AUG 02, 2018 AT 11:54 AM EDT

By Chantal Da Silva

Chief Correspondent

0

Share

Newsweek is a Trust Project member

A sunflower farm in Canada has been forced to close its gates to Instagrammers, Snapchatters and other snap-happy social media users in search of the perfect selfie after thousands of people flooded the grounds to take photos.

The Bogle family, which operates its farm Bogle Seeds in Hamilton, Ontario, roughly 42 miles from Toronto, [said on its website](#) that "unfortunately, with the police involved, we have had to close the photos opportunities" after a traffic jam plugged roads for hours on Saturday, July 28.

Newsletters

Outside

Travel > National Parks

## Timed-Entry Reservations Return to Our National Parks This Year. Here's the Scoop.


Timed-entry reservations are back. Our national parks columnist reveals how to get into these popular parks.

2

0

Share

Save





# impact of going viral

- A mix of social and cultural moments can send destinations viral – driving major visitation spikes
- The TV series *Yellowstone* drove 2.1 million visitors and \$730M in visitor spending in Montana in 2021







# what this means for you:

Evolve how social and video fit into your marketing strategy.



Make sure social  
is part of your  
core marketing  
strategy



You don't need a  
celebrity –  
partner with a  
local creator.



Video doesn't  
have to break the  
bank; keep it  
simple and  
unique.



Low risk, high  
reward. Have fun  
with it 😊

# the path to travel



While the same fundamentals – like visual storytelling and high-impact placements – are still relevant in the traveler journey, the way they're executed looks different today and will keep evolving as the world and people change.

# discussion





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