



GOALS FOR TODAY

1. Share Our Overall 2026 Approach and What Informs It
2. Share What We've Learned
3. Share Opportunities Our Efforts Create





2025 RESULTS



\$182M+

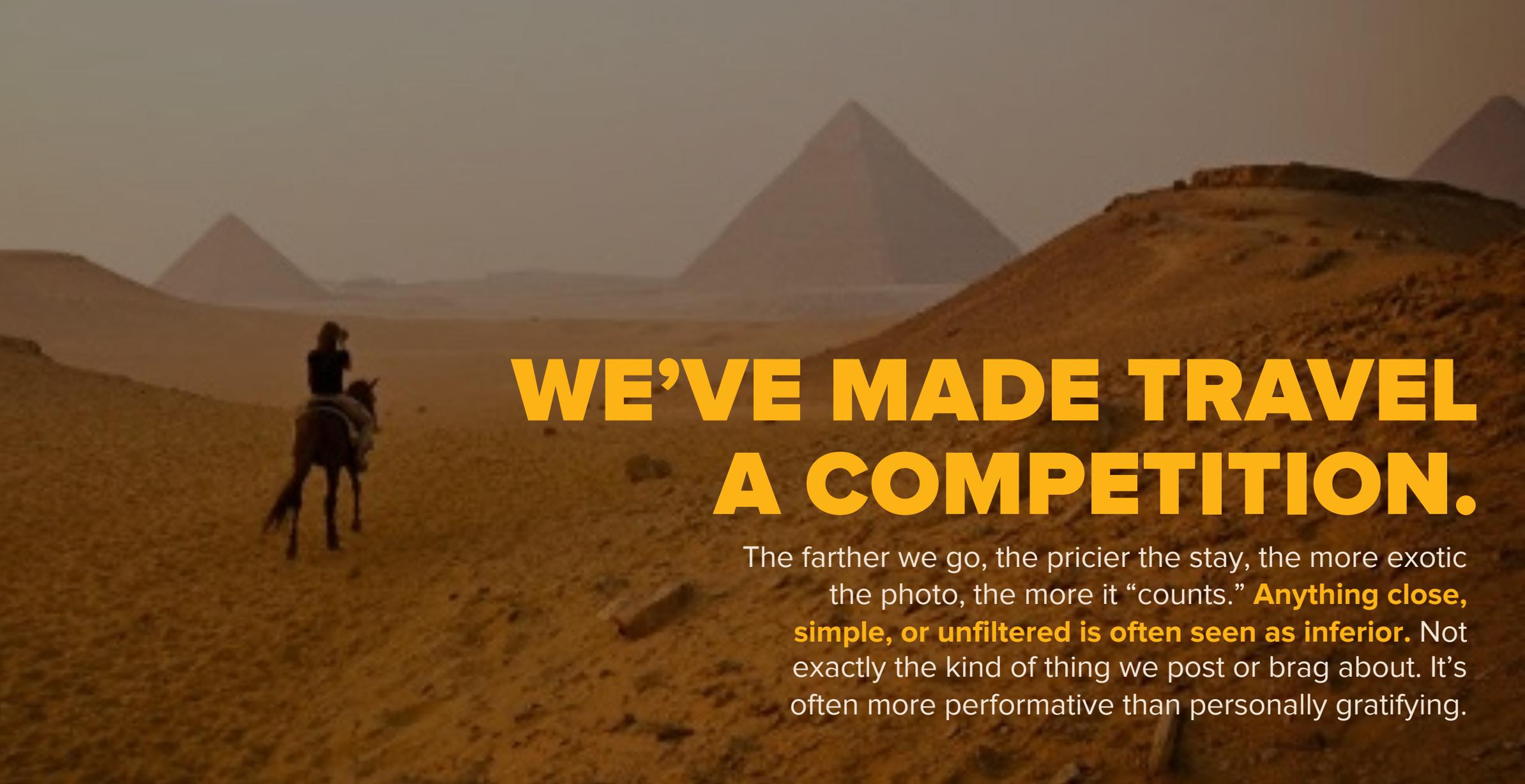
EST TOTAL BOOKING
REVENUE

668M+

TOTAL PAID MEDIA
IMPRESSIONS

89M+

TOTAL AUDIO/VIDEO AD
COMPLETIONS

A photograph of a person riding a horse in a desert landscape. In the background, the Great Pyramids of Giza are visible under a hazy sky. The person is silhouetted against the light, and the horse is dark. The foreground is sandy ground.

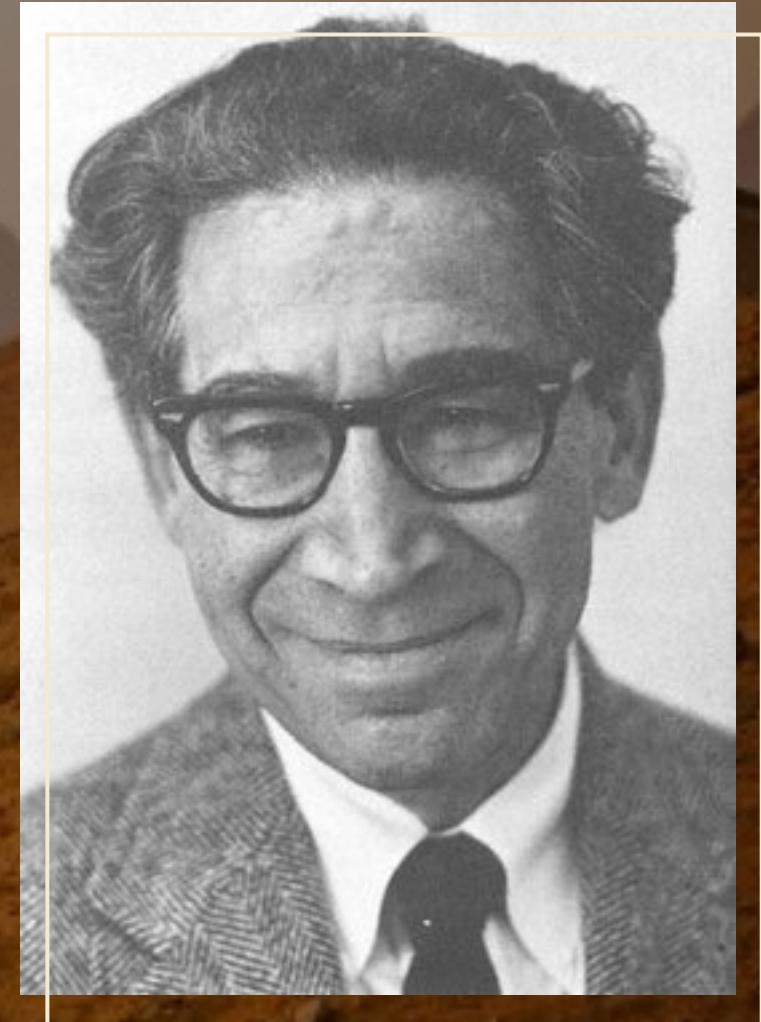
WE'VE MADE TRAVEL A COMPETITION.

The farther we go, the pricier the stay, the more exotic the photo, the more it “counts.” **Anything close, simple, or unfiltered is often seen as inferior.** Not exactly the kind of thing we post or brag about. It’s often more performative than personally gratifying.



“Upward social comparisons—comparing ourselves to those better off—can lower self-regard, while the pressure to maintain a favorable image further deepens dissatisfaction.”

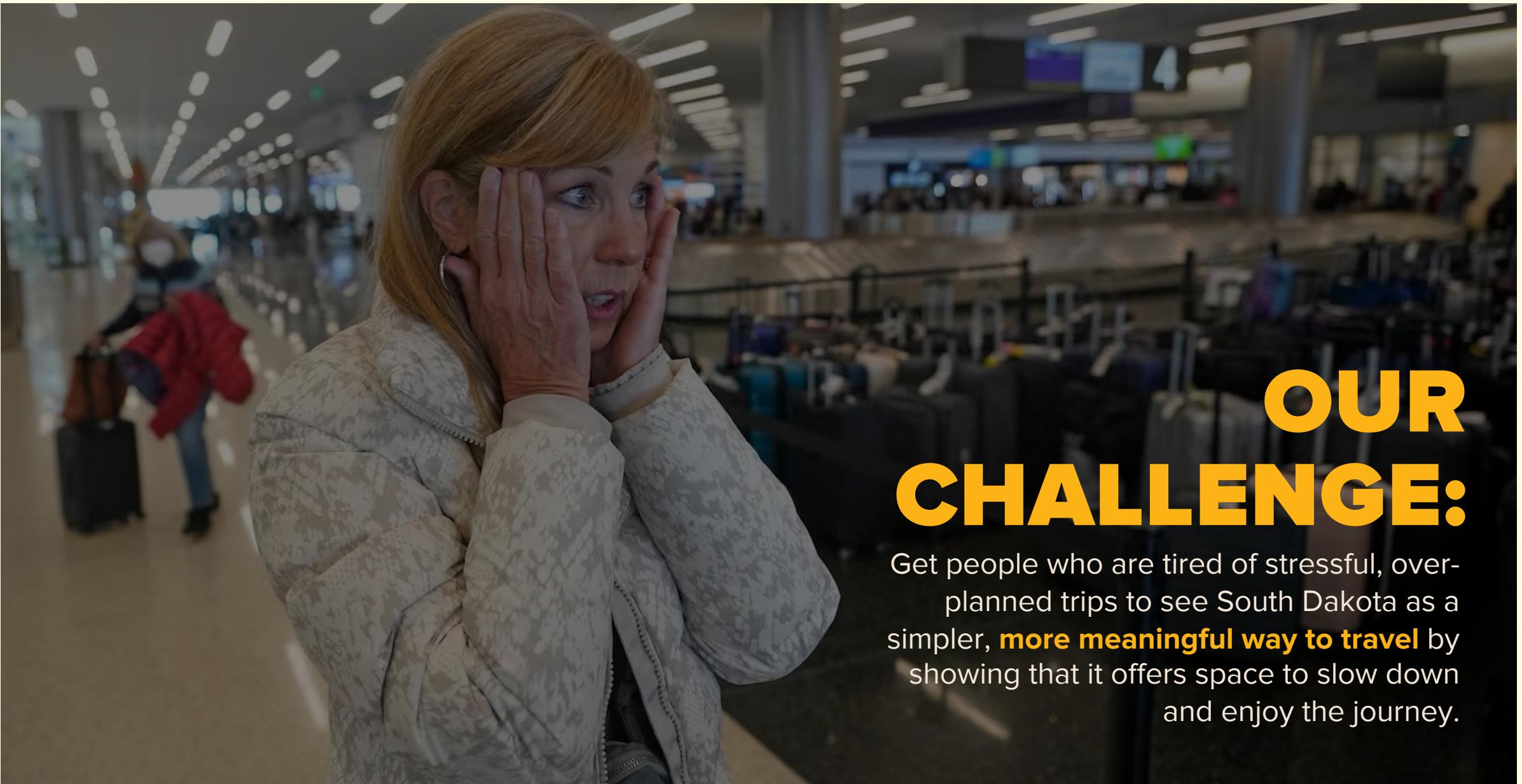
— Leon Festinger’s Social Comparison Theory (1954)



SPECTACLE ≠ SUBSTANCE

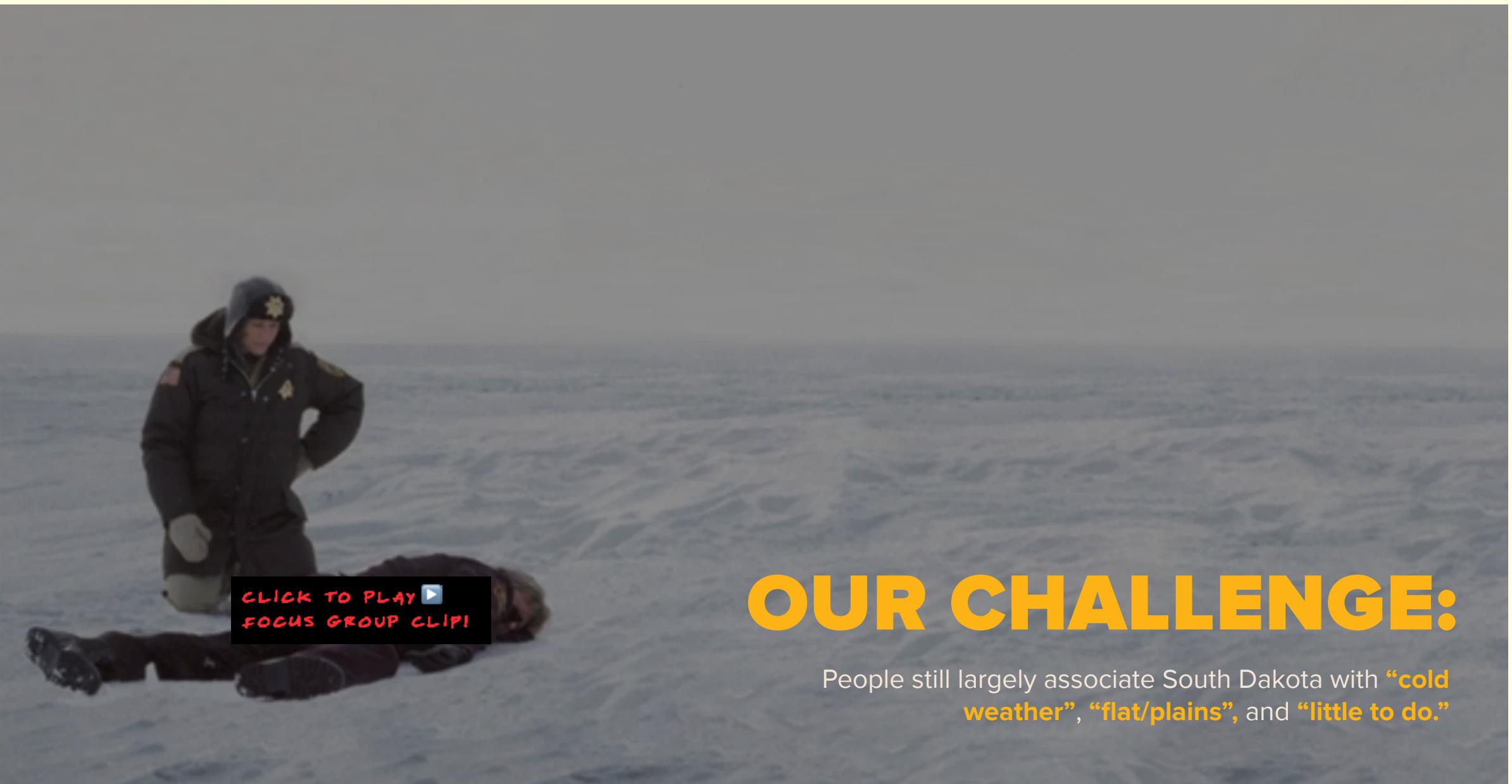
Depth isn't measured in miles or likes. And oftentimes, **the most lasting shifts can only happen when we give them space to** — when we're off the feed, not in lines, and away from the noise.





OUR CHALLENGE:

Get people who are tired of stressful, over-planned trips to see South Dakota as a simpler, **more meaningful way to travel** by showing that it offers space to slow down and enjoy the journey.



OUR CHALLENGE:

People still largely associate South Dakota with “**cold weather**”, “**flat/plains**”, and “**little to do.**”



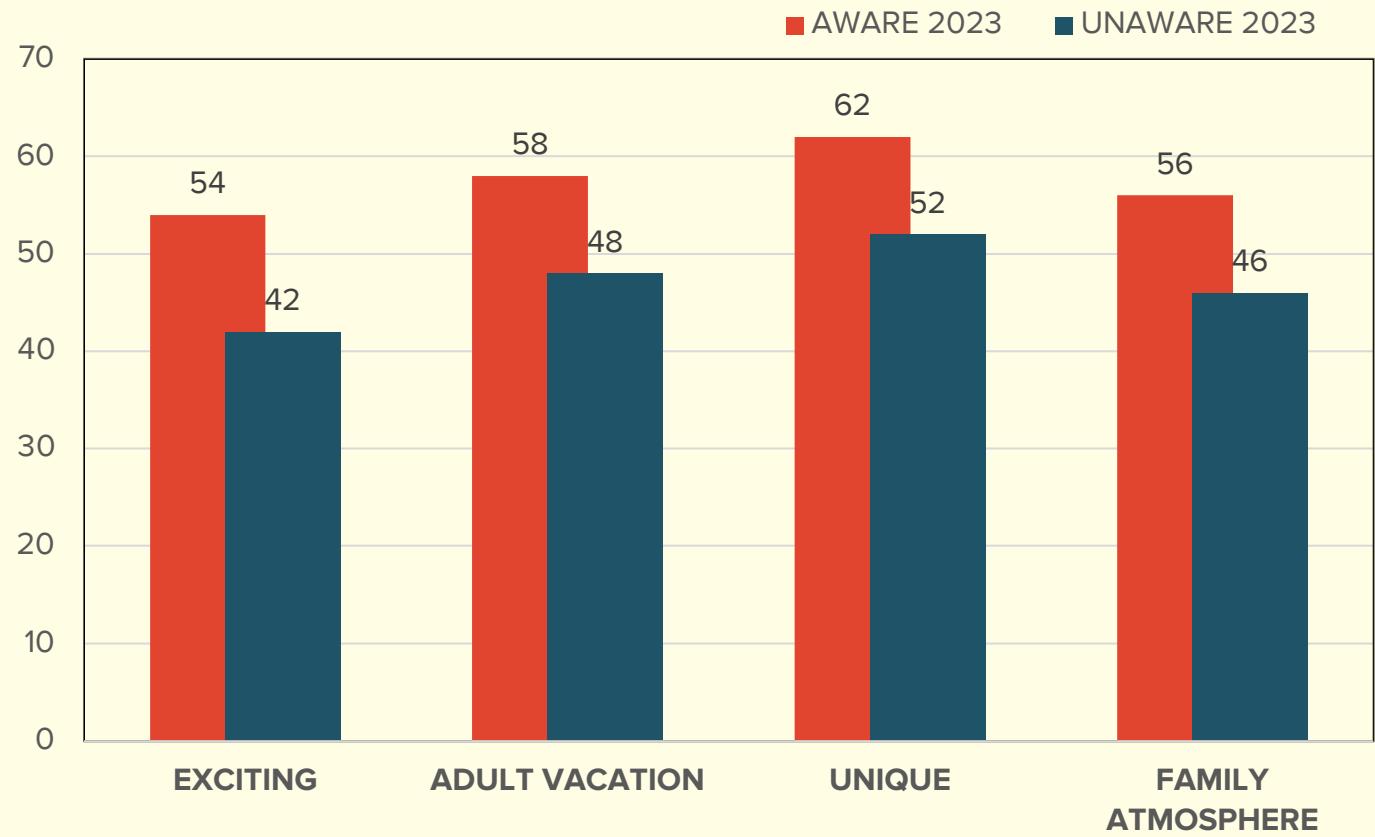
OUR CHALLENGE:

“While traveler spending increased 7.04% year-over-year in Q3, lodging saw the steepest drop...pointing to shorter stays, more budget-minded choices, and value-driven booking behavior.”



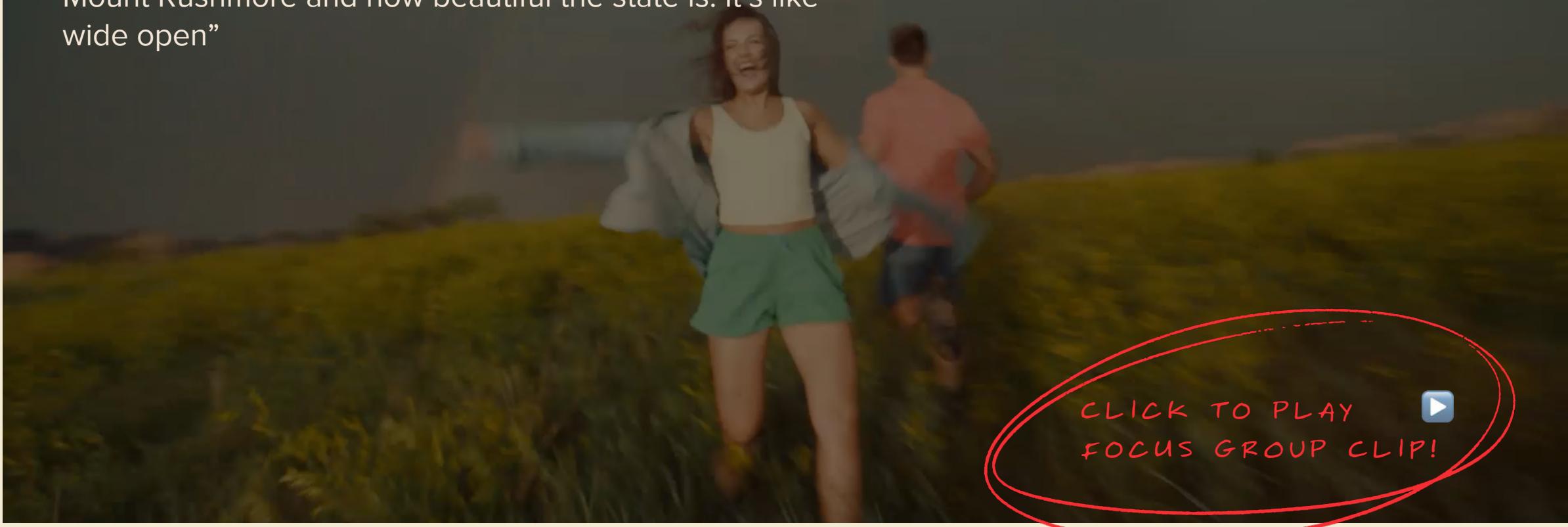
ADVERTISING IMPACT ON IMAGE

SOUTH DAKOTA 2023 ADVERTISING
ROI/IMAGE/HALO RESEARCH
TOP TRAVEL MOTIVATORS FOR TARGET MARKETS



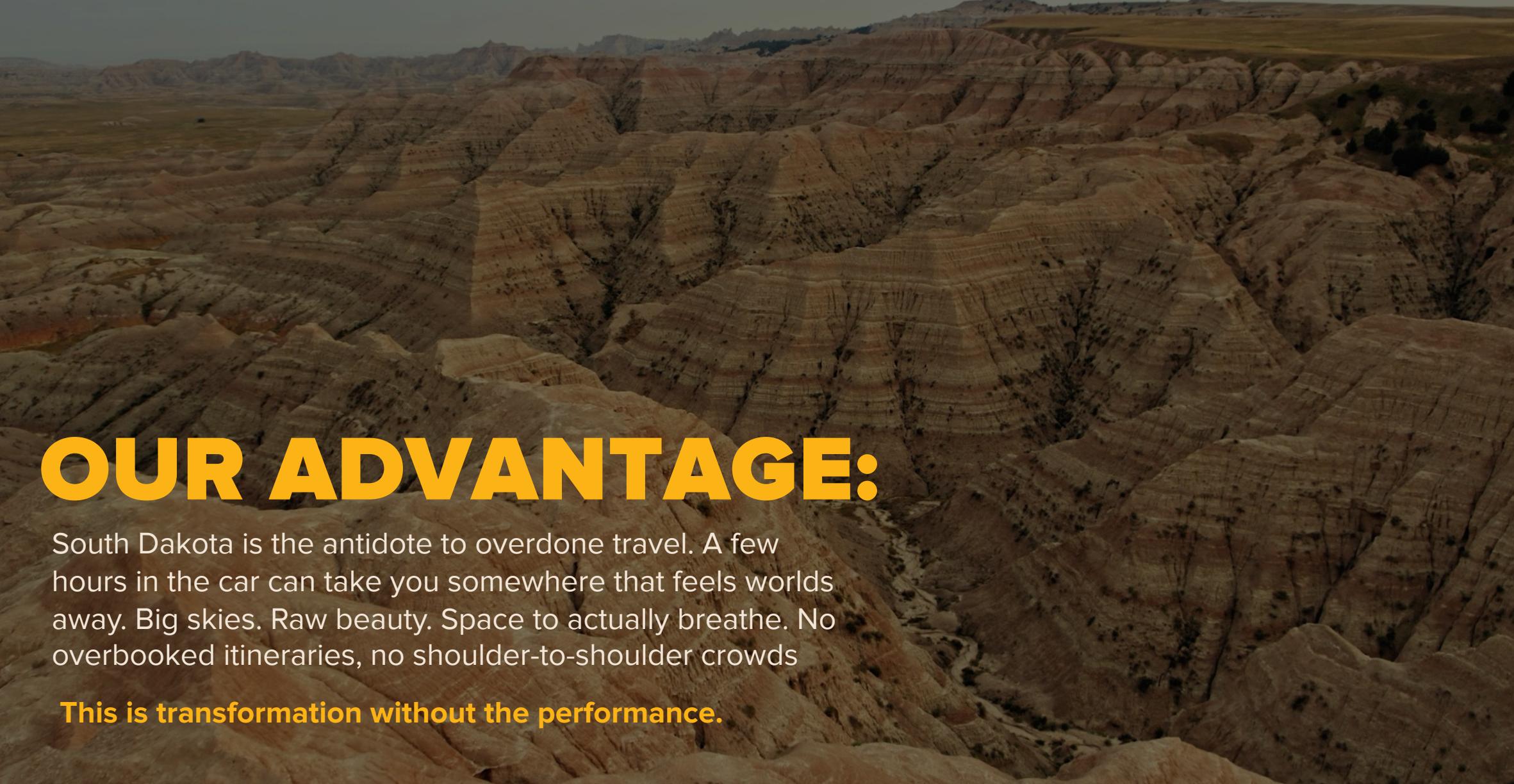
OUR ADVANTAGE:

“That’s like my favorite part of the country... it reinforced the fact of just how beautiful it is. When I went there the first time I was in awe when I saw Mount Rushmore and how beautiful the state is. It’s like wide open”



CLICK TO PLAY
FOCUS GROUP CLIP!





OUR ADVANTAGE:

South Dakota is the antidote to overdone travel. A few hours in the car can take you somewhere that feels worlds away. Big skies. Raw beauty. Space to actually breathe. No overbooked itineraries, no shoulder-to-shoulder crowds

This is transformation without the performance.

OUR ADVANTAGE:

“I love the spontaneity...the freedom actually, to kinda just roam around.”

CLICK TO PLAY 
FOCUS GROUP CLIP!





CLICK TO PLAY! 

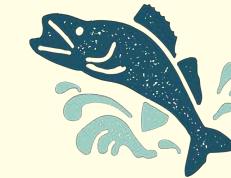


FREE TO



FREE TO arrive without a plan. To adventure hard
OR do nothing on purpose. To sit on the hood and
stare at the sky. To be changed and be okay with it.

TRAVEL
South Dakota



RESEARCH

- **Commissioned Third-party Studies**
- **Increased Vendor Insights and Add-on Studies**
- **New Love Communication Ongoing Focus Groups**



**WE UNDERSTAND BIASES
EXIST MOST EVERYWHERE—
ESPECIALLY IN
PRESUMPTIONS**

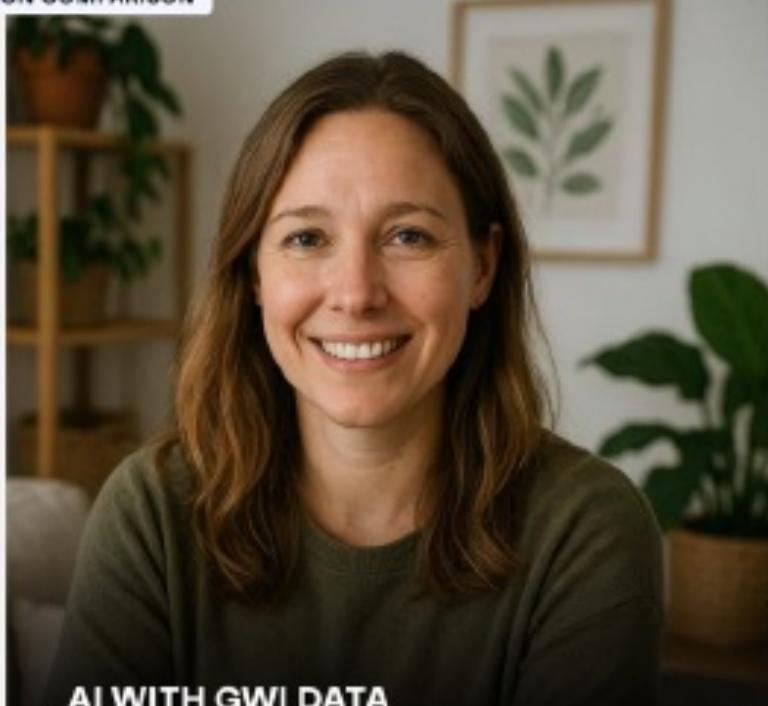
“What does the average US country music fan look like?”

AI IMAGE GENERATION COMPARISON



AI WITHOUT GWI DATA

Generic image of a man in a cowboy hat, denim jacket, standing in a rural field at sunset.



AI WITH GWI DATA

- 56% female
- 25% more likely to use Pinterest
- 42% into gardening





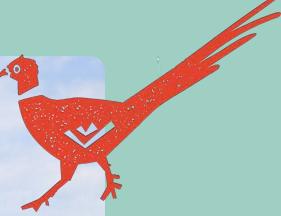
ChatGPT:

“Can you generate a photo of what the main visitor to South Dakota looks like?”



ChatGPT:

“How about the main visitor to Sioux Falls, South Dakota?



ChatGPT:

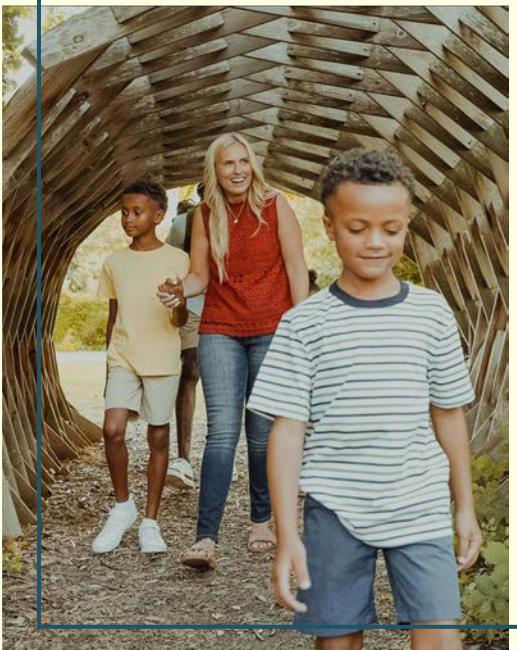
“What does the average visitor to South Dakota look like?



A man with short brown hair is sleeping on a brown leather couch. He is wearing a purple t-shirt and patterned pajama bottoms. A book is resting on his chest. The couch is in a room with a window in the background. The text "THE MYSTERY-STARVED TRAVELER" is overlaid on the image in large, white, sans-serif capital letters.

THE MYSTERY- STARVED TRAVELER

OUR AUDIENCES



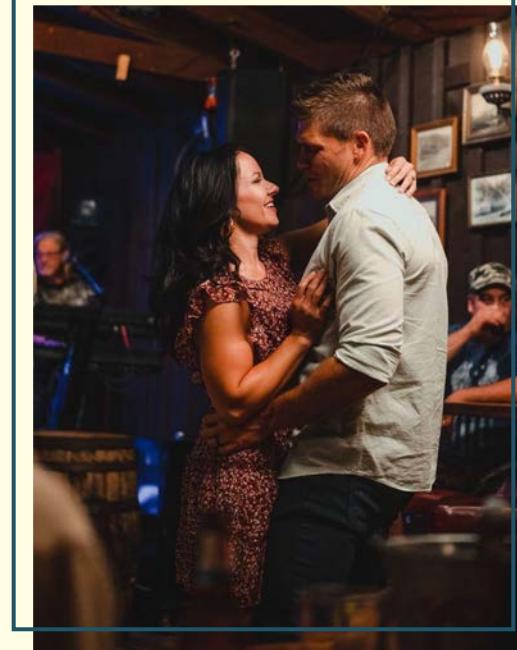
MEMORY MAKERS

- Families, 25-44
- HHI: \$60-150k
- Children in HH, family is everything



MOMENT SEEKERS

- Older couples, 50+
- HHI: \$100k+
- No children



THRILL CHASERS

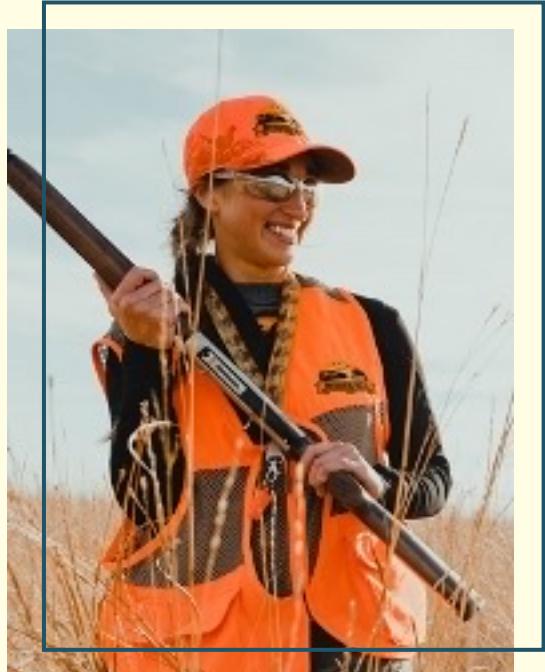
- Younger couples, 25-44
- HHI: \$50-100k
- No children



KNOWN TRAVELERS

- Within our general audience but have already shown booking intent

OUR AUDIENCES



HUNTING (GENERAL)

- Male & female, 18-65+
- HHI: \$50-115k+
- Formerly 4x segmented audiences



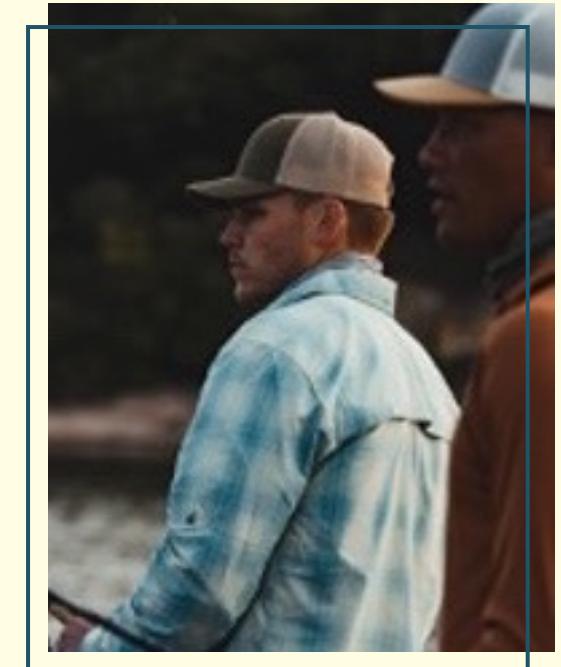
MOTORCYCLE ENTHUSIASTS

- Age 21-55+
- HHI: \$75k+
- Interested in motorcycling & Sturgis



ENTERTAINMENT ENTHUSIASTS

- Age 21-55+
- HHI: \$75k+
- Interested in live music, festivals, etc.

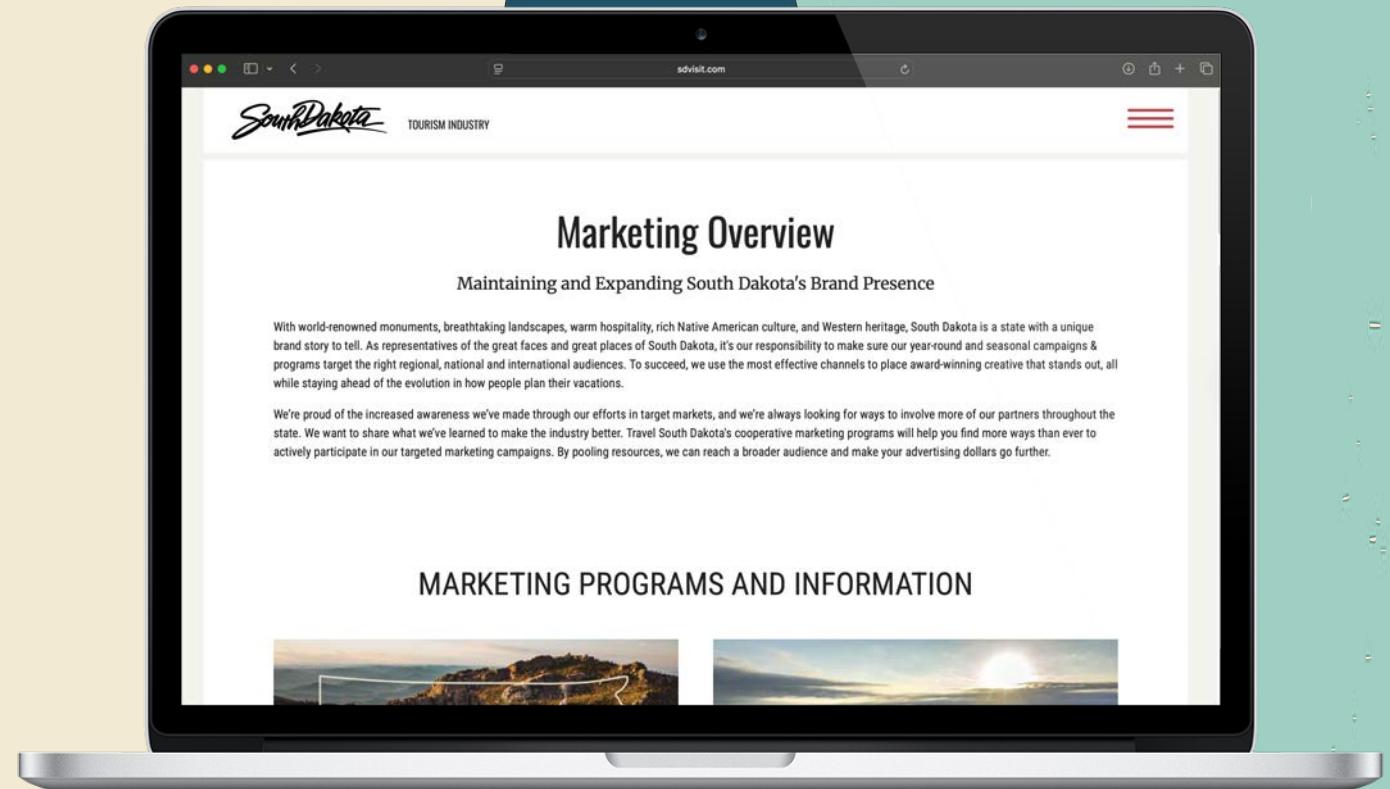


FISHING (GENERAL)

- 18-55+
- HHI: \$50-115k+
- Formerly 2x fishing audiences



RESOURCES AVAILABLE ON SDVISIT.COM

A laptop is positioned in the center, displaying a website for "SDVisit.com". The website features a header with the "Travel South Dakota" logo and the text "TOURISM INDUSTRY". Below the header, a section titled "Marketing Overview" is visible, with the sub-section "Maintaining and Expanding South Dakota's Brand Presence". The text in this section discusses the state's unique brand story and its marketing efforts. Another section titled "MARKETING PROGRAMS AND INFORMATION" is also visible, along with two small images of landscapes. The laptop is set against a background of vertical panels in tan, dark blue, and teal colors, with a red pheasant graphic in the top right corner.

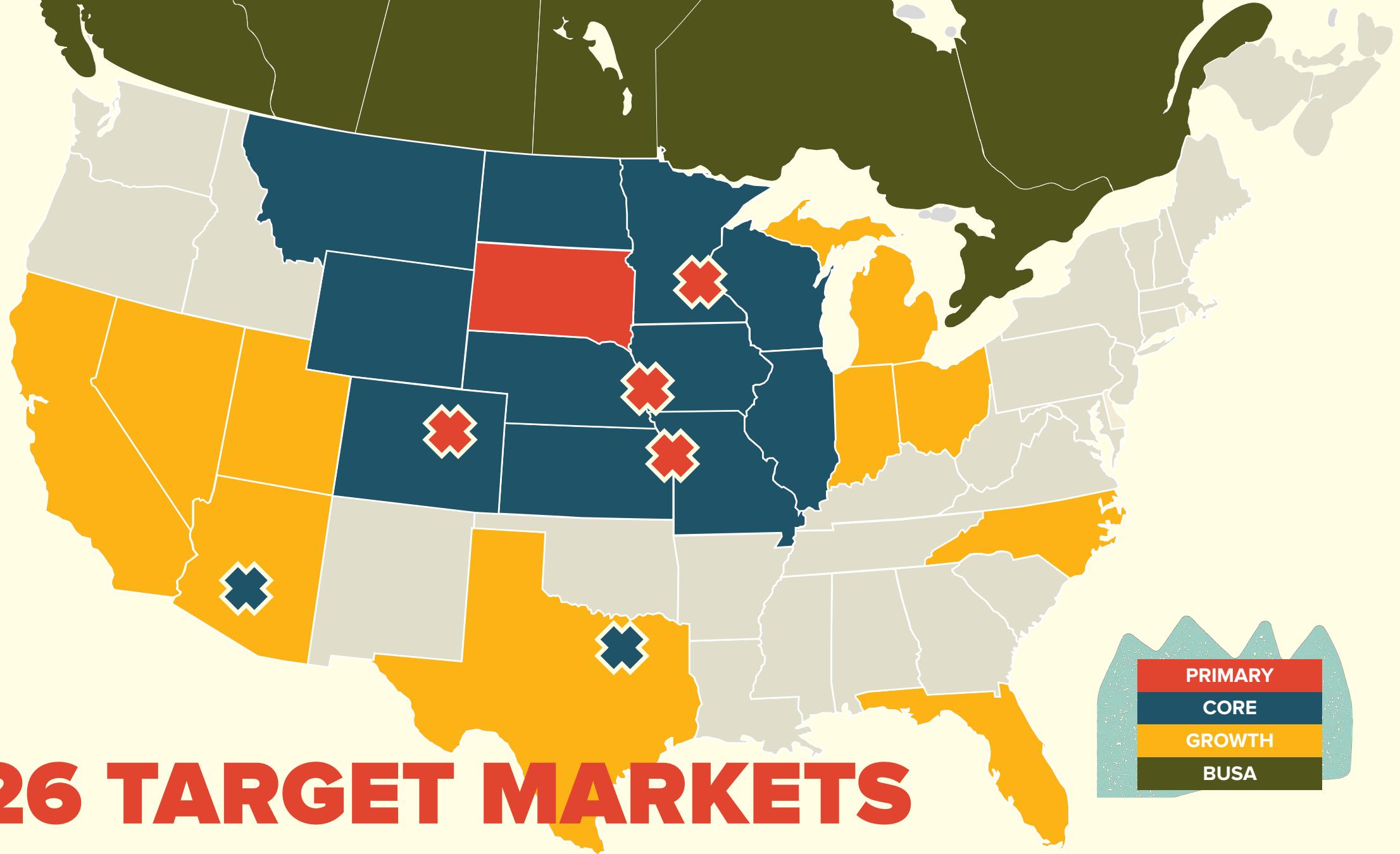
Marketing Overview

Maintaining and Expanding South Dakota's Brand Presence

With world-renowned monuments, breathtaking landscapes, warm hospitality, rich Native American culture, and Western heritage, South Dakota is a state with a unique brand story to tell. As representatives of the great faces and great places of South Dakota, it's our responsibility to make sure our year-round and seasonal campaigns & programs target the right regional, national and international audiences. To succeed, we use the most effective channels to place award-winning creative that stands out, all while staying ahead of the evolution in how people plan their vacations.

We're proud of the increased awareness we've made through our efforts in target markets, and we're always looking for ways to involve more of our partners throughout the state. We want to share what we've learned to make the industry better. Travel South Dakota's cooperative marketing programs will help you find more ways than ever to actively participate in our targeted marketing campaigns. By pooling resources, we can reach a broader audience and make your advertising dollars go further.

MARKETING PROGRAMS AND INFORMATION



2026 TARGET MARKETS

2026 INTERNATIONAL TARGETS



The Consumer's Decision-Making Process

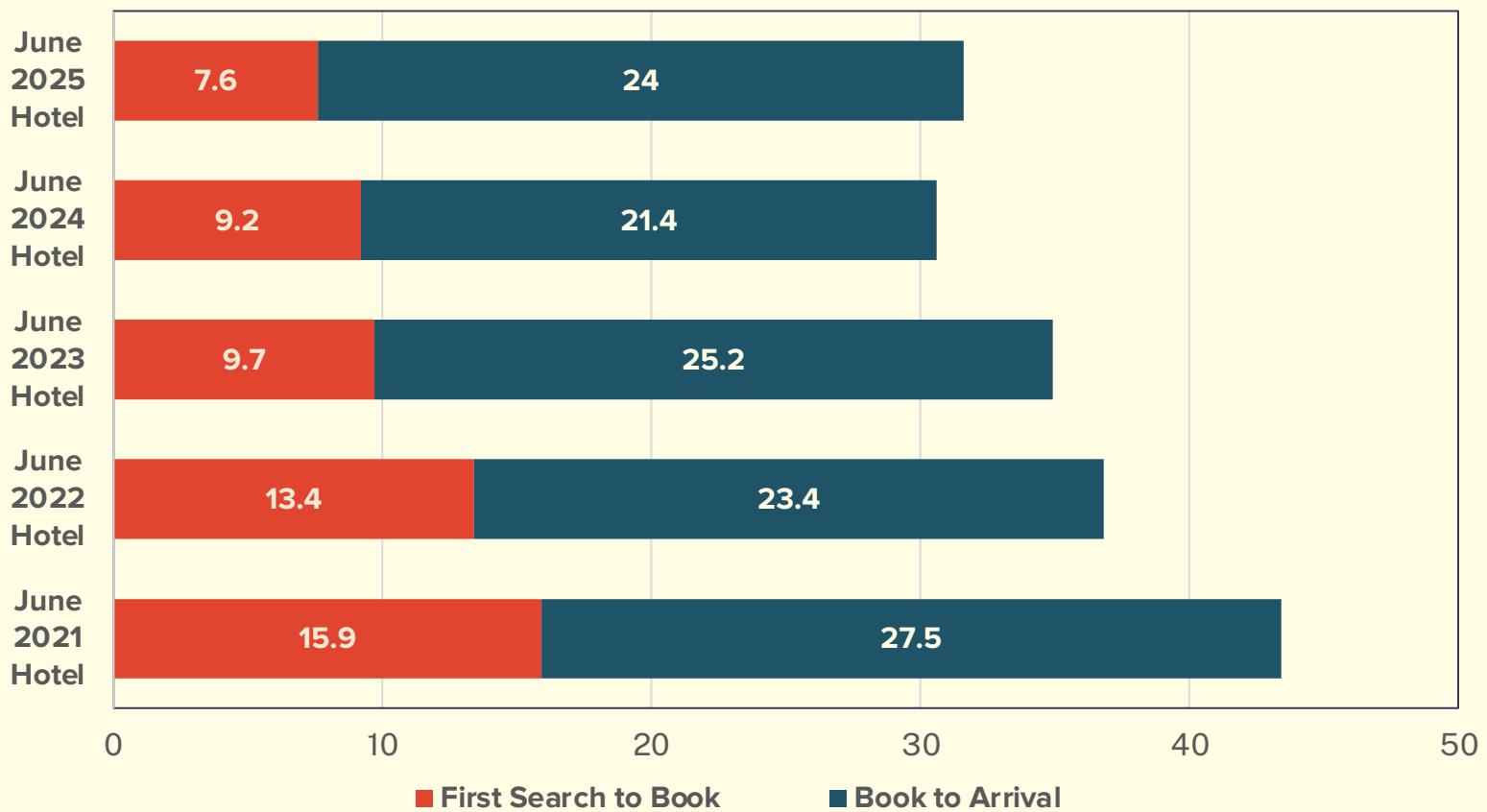
"Purchase intent often builds in the background, especially for high-consideration items, and isn't always declared. The binary between planned and impulsive falls apart when we recognize most purchases happen when intent reaches a "tipping point of confidence."

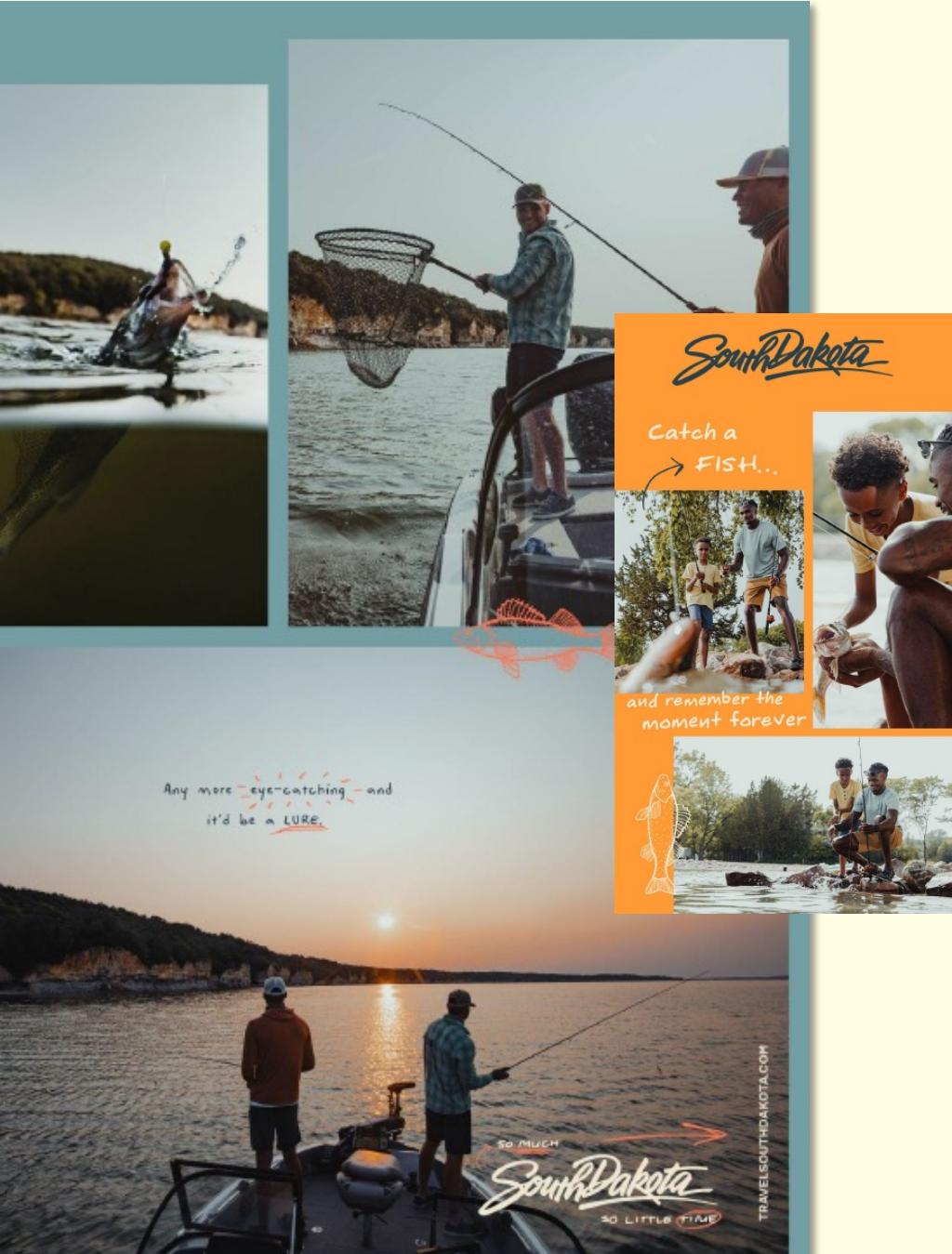
- GWI, "Connecting the Dots: 5 Major Marketing Trends for 2026"





HOTEL TRIP PLANNING WINDOWS 2021-2025

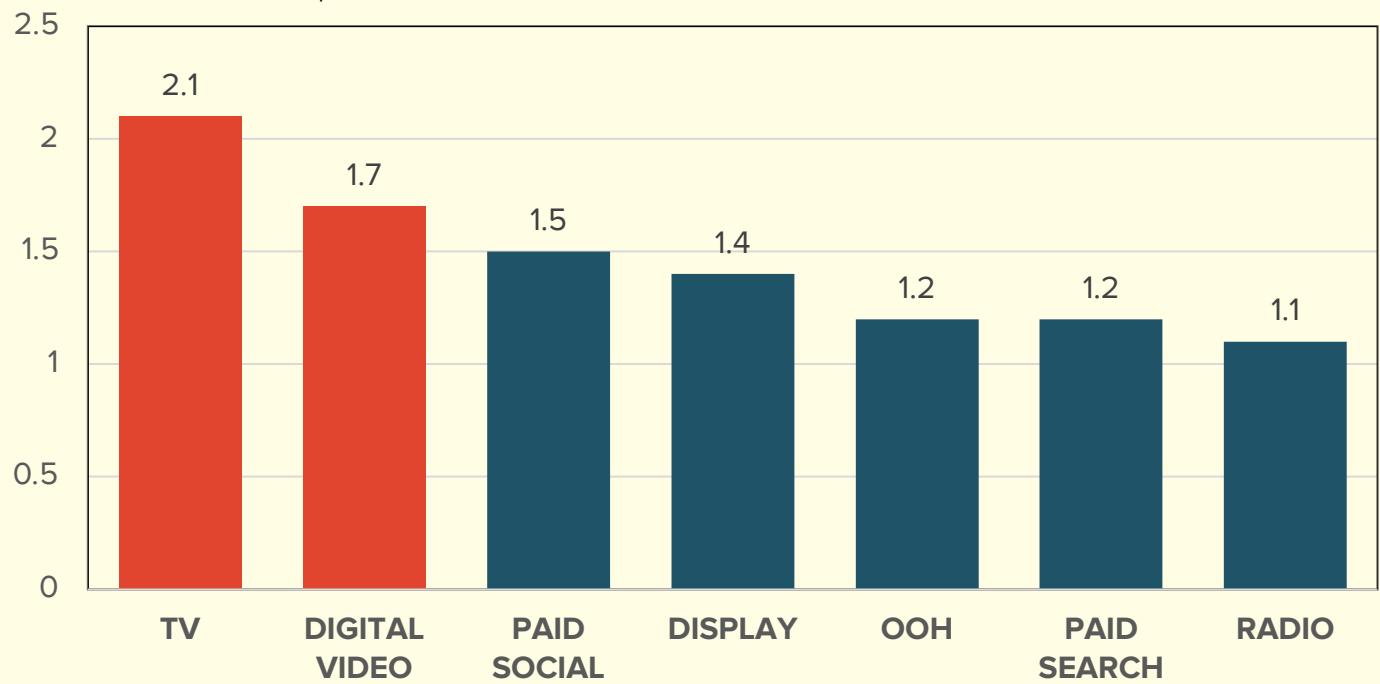




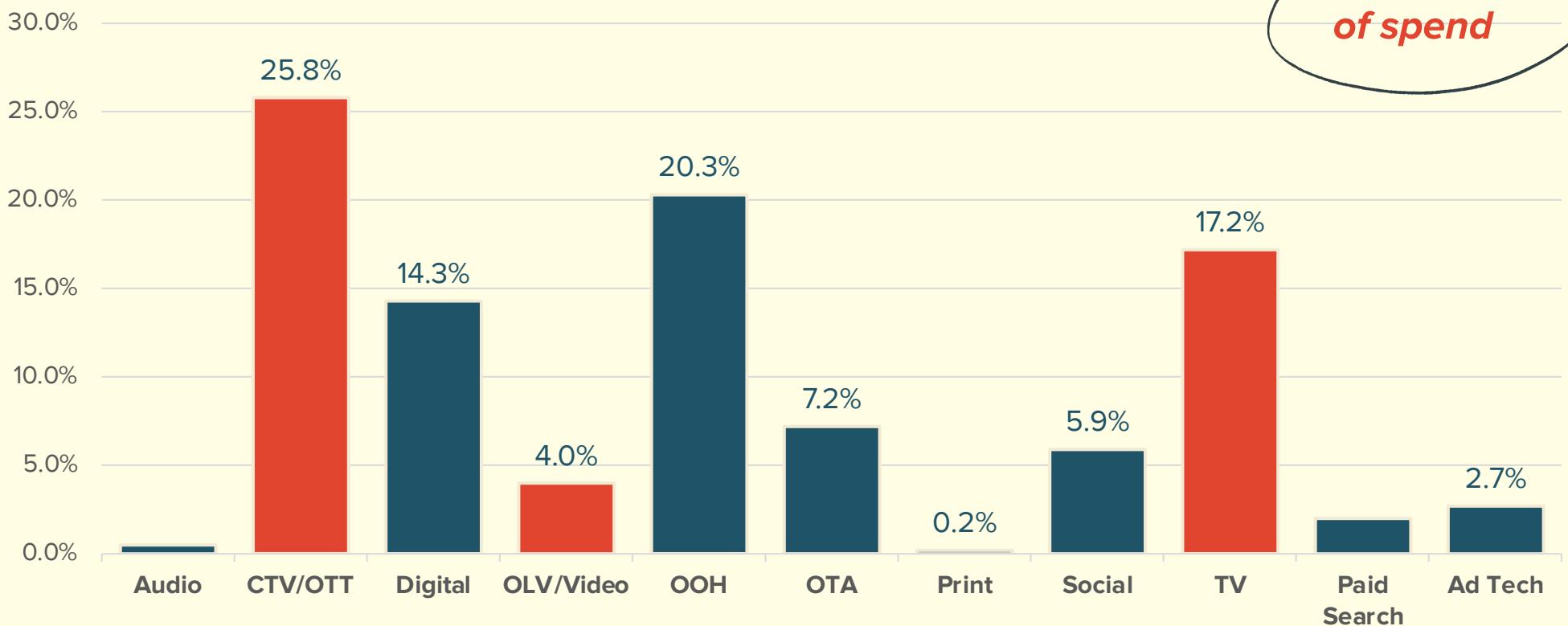
BRAND BUILDING IS CRITICAL FOR LONG-TERM ROI

NIELSEN BENCHMARKS LONG-TERM ROI MULTIPLIERS

Source: Nielsen Compass

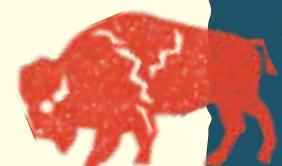
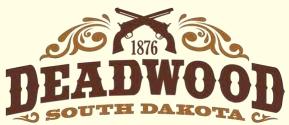


FY26 TSD BRAND MEDIA MIX

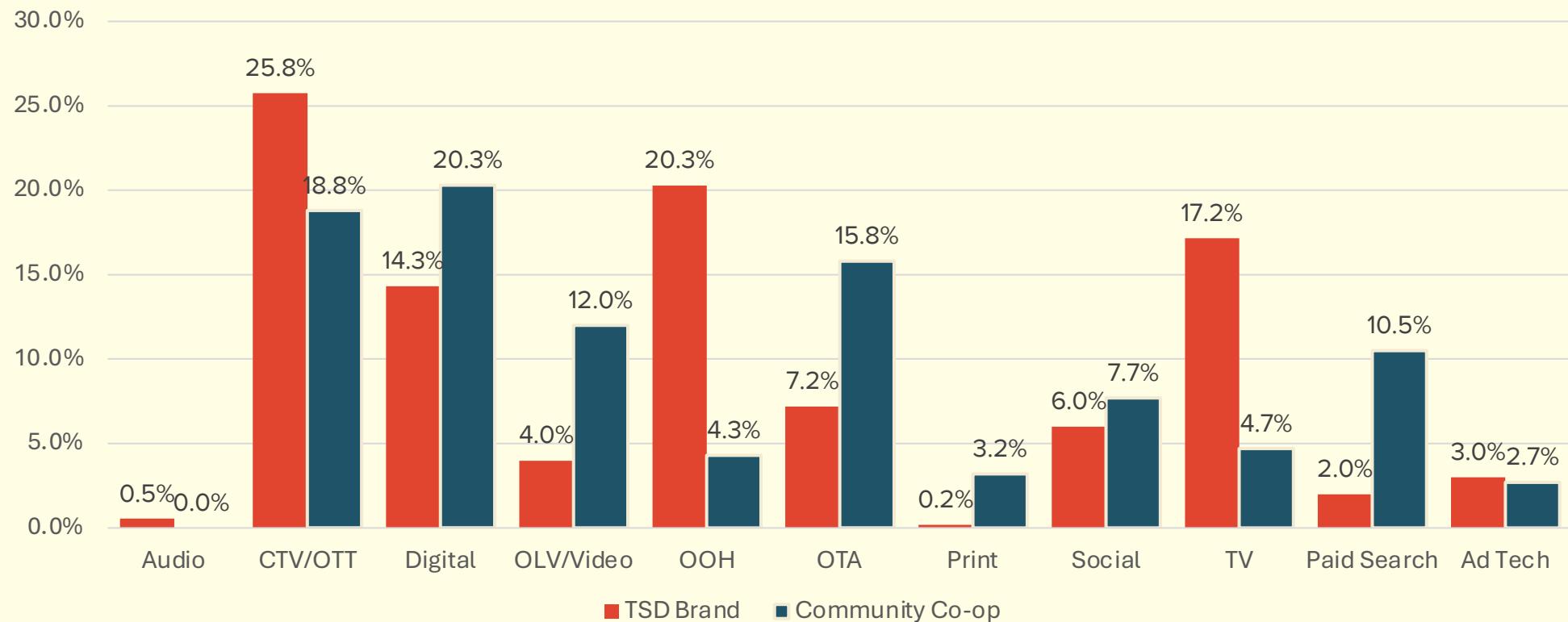




2026 COMMUNITY CO-OP PARTNERS



FY26 MEDIA MIX TSD vs CO-OP



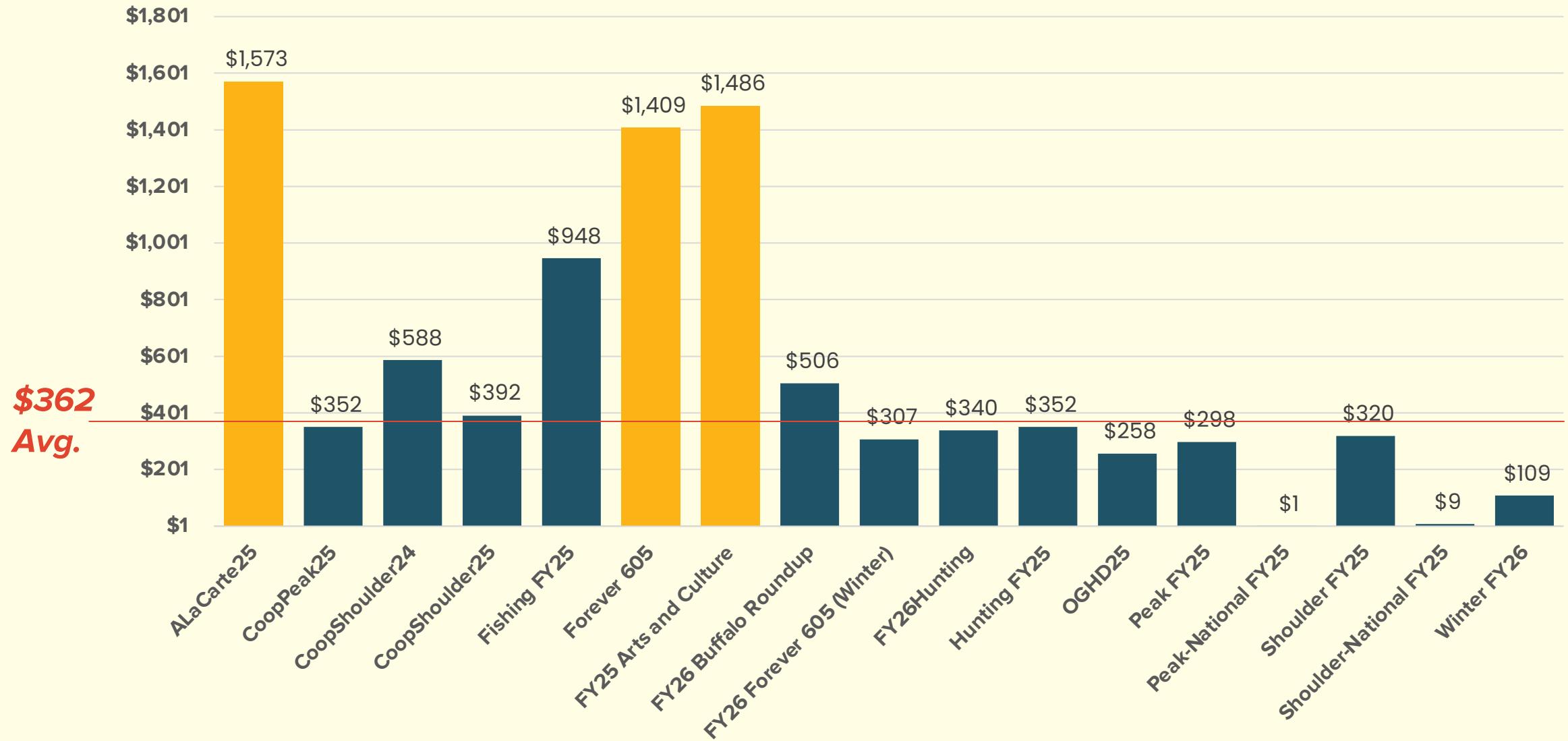


\$82M+

**TOTAL EST BOOKING REVENUE IN
2025 FROM CO-OPS**

45% OF TOTAL

REVENUE BY CPM 2025 CAMPAIGNS



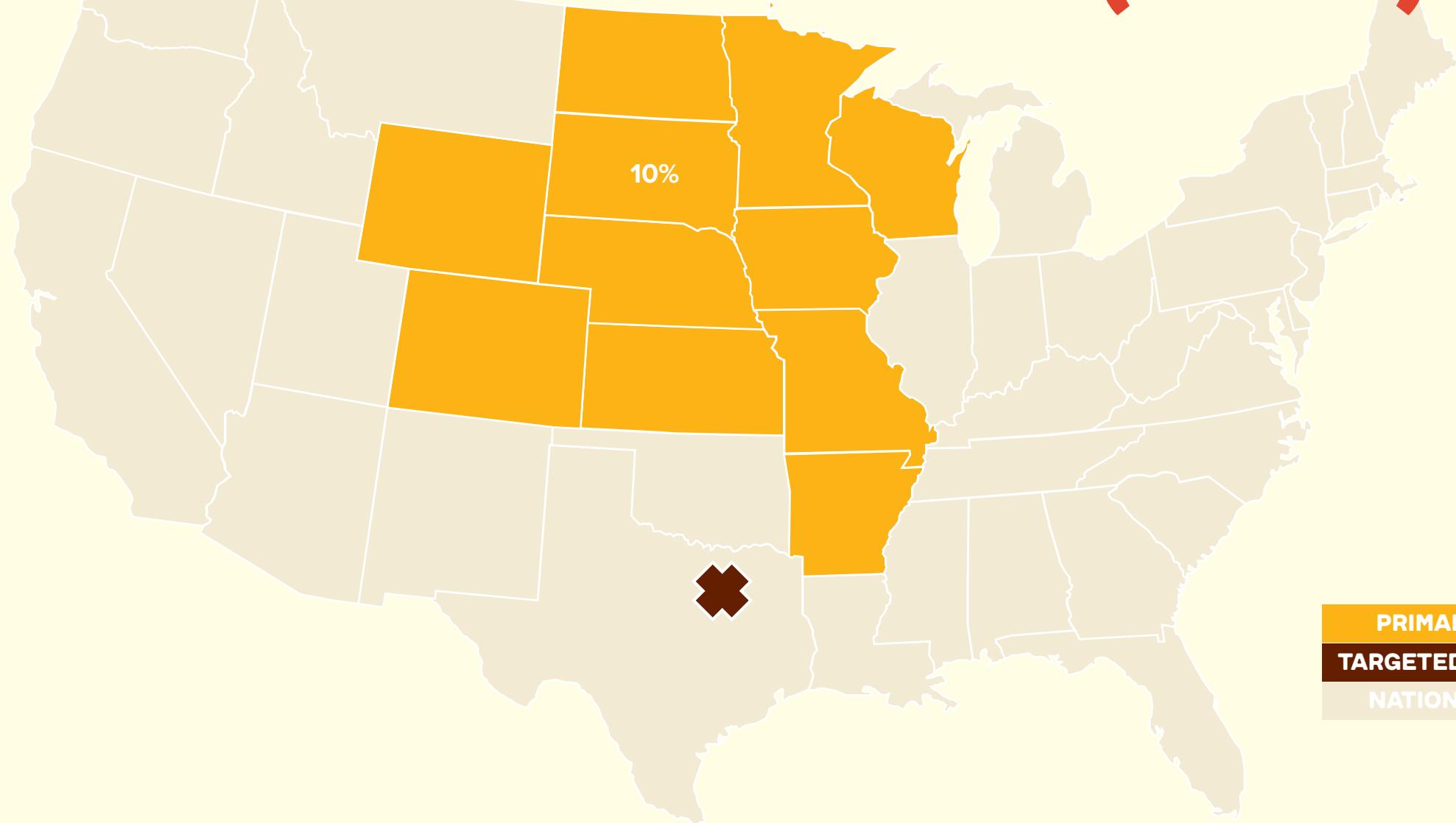


WHAT'S GREATER
THAN THAT?

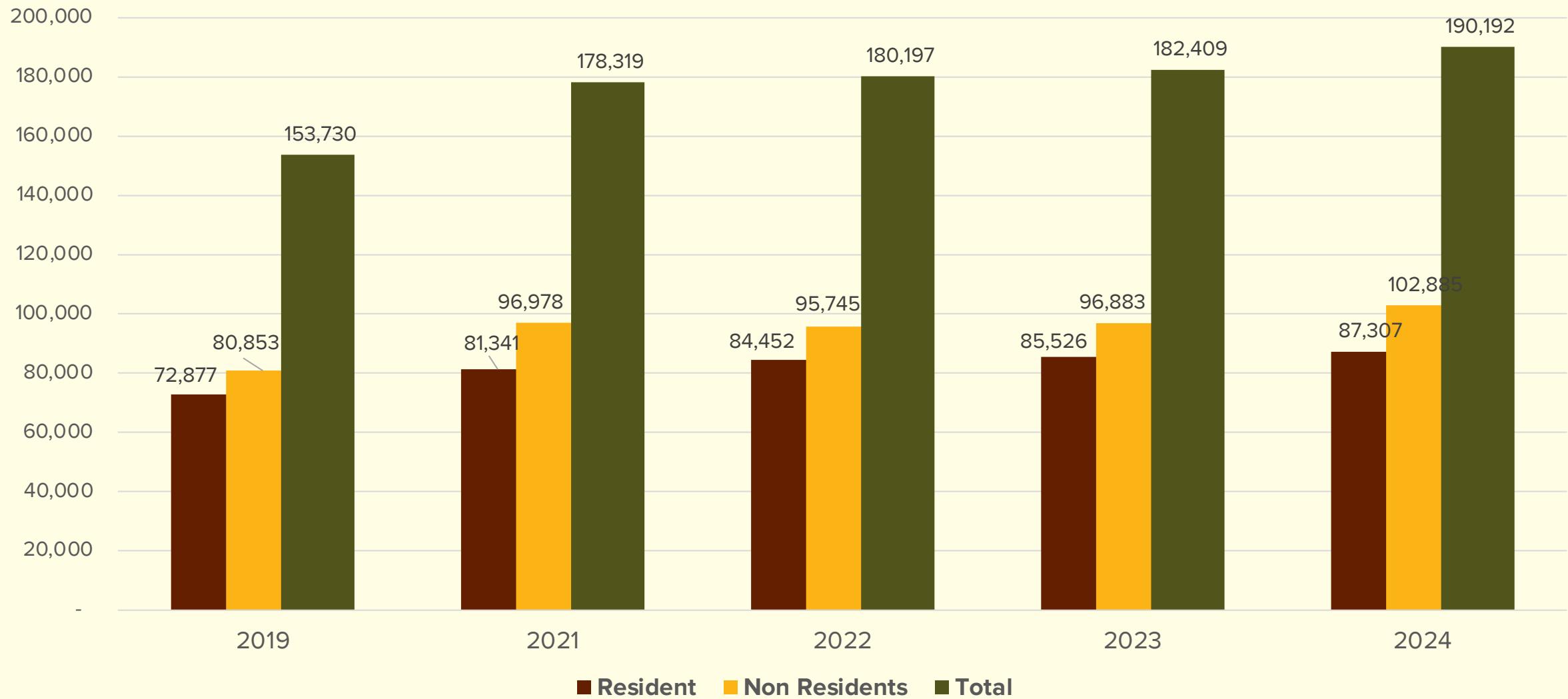


CLICK TO PLAY! 

YEAR SIX MARKETS (2025)

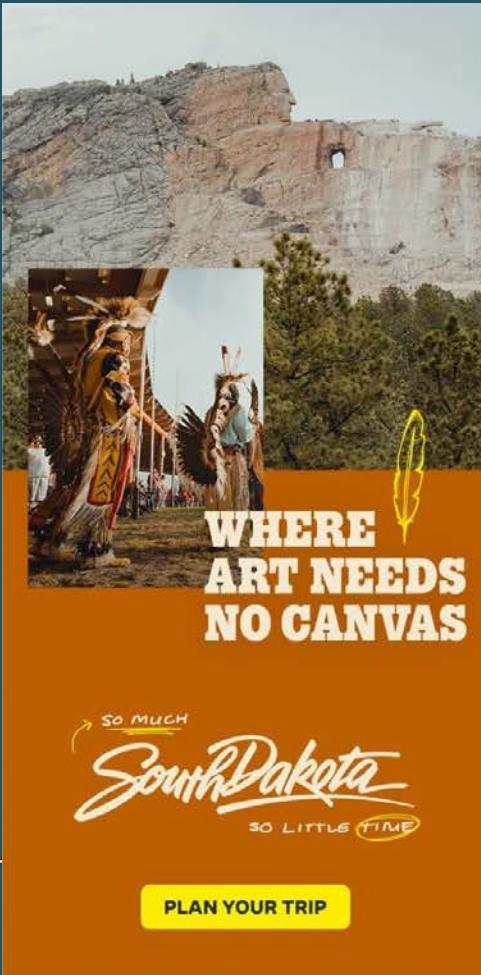


LICENSE TRENDS – 5YR LOOK



A black and white photograph of three dogs running through deep snow. On the left, a brown and white dog is captured mid-stride. In the center, a light-colored dog with a red collar is also running. On the right, a dark-colored dog is partially visible, also in motion. The background is a soft-focus snowy landscape.

**SINCE 2019, LICENSE
SALES ARE UP MORE
THAN 23.7%**



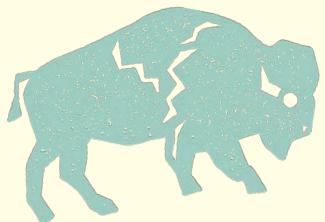
2 OF TOP 3

ADS LEADING IN AWARENESS AND
RECALL FROM THE 2023
LONGWOODS "ADVERTISING ROI
STUDY" STRONGLY FEATURED
NATIVE OFFERINGS

POTENTIAL VISITOR INSPIRATION

PHASE 1 QUALITATIVE RESULTS Q3 2025

1. **Word of Mouth**
2. **Digital & Social Media:** YouTube, Instagram, Facebook, and TikTok are key platforms for content consumption and inspiration.
3. **Entertainment:** Sports programming, TV shows, movies, and travel influencers on YouTube.





2025 SOCIAL MEDIA RESULTS



92M+

USERS REACHED

669k+

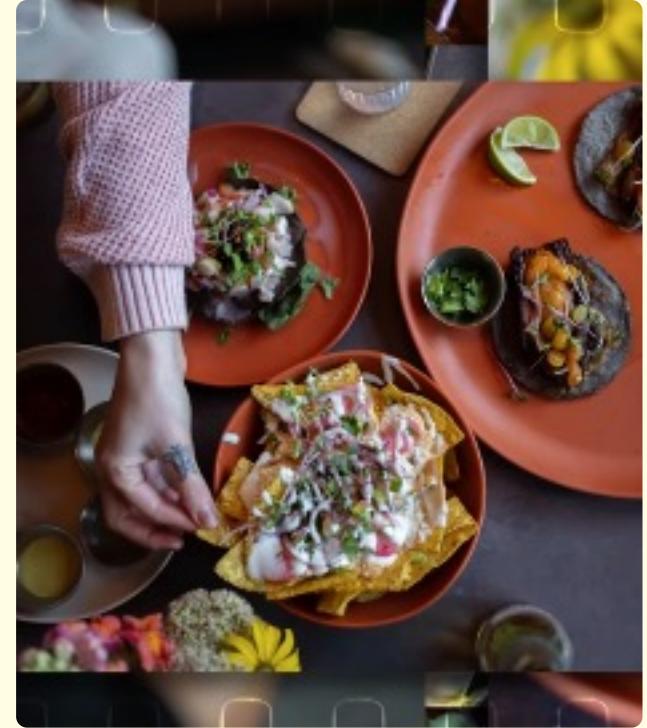
TOTAL ORGANIC
ENGAGEMENTS



54+ Years

TOTAL WATCH TIME OF TRAVEL SOUTH
DAKOTA LONGFORM VIDEO CONTENT IN 2025

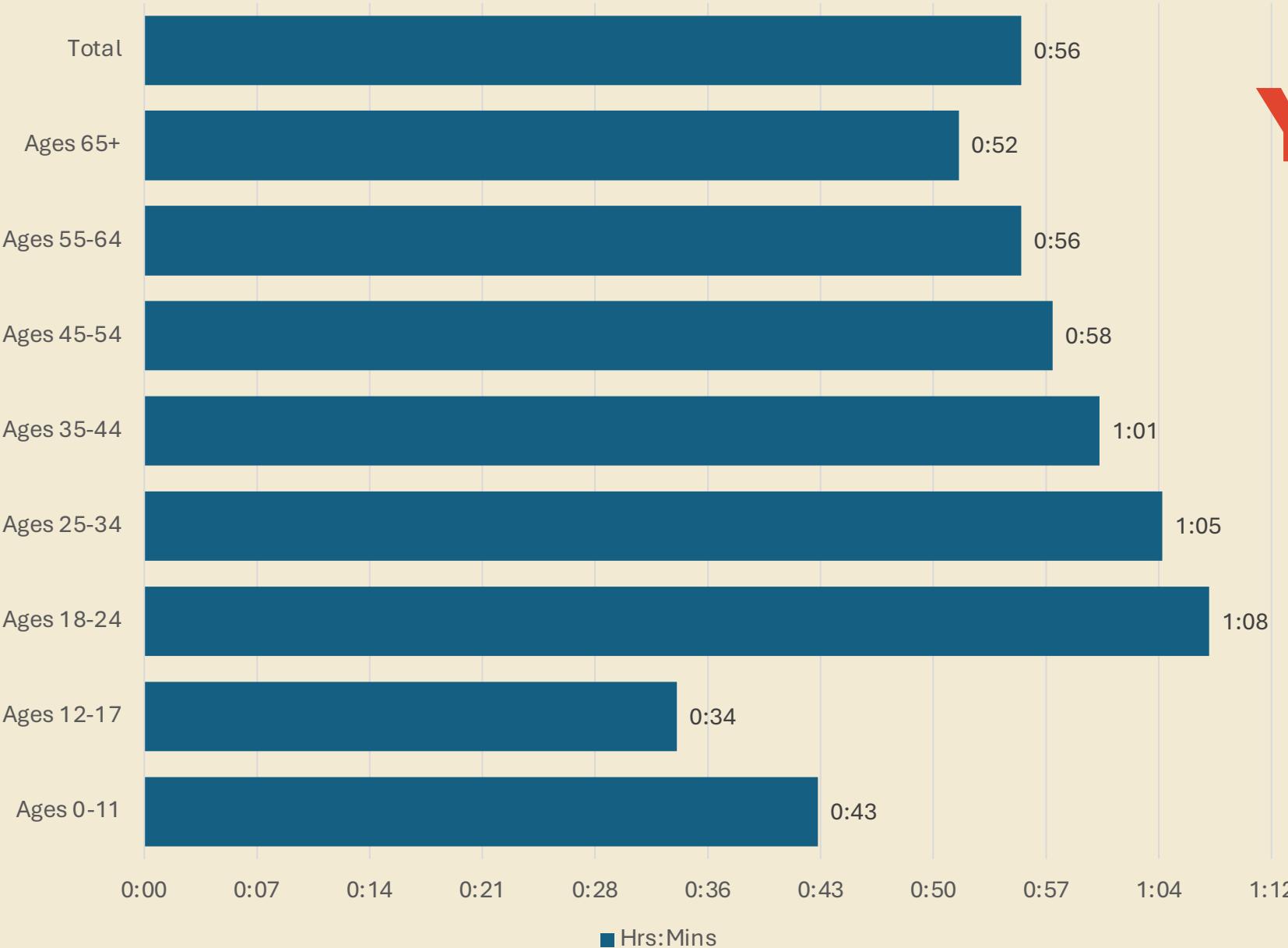
1000 2000 3000 4000 5000 6000 7000 8000 9000 10000





CLICK TO PLAY! 

YOUTUBE'S GROWTH AVG TIME SPENT PER DAY



TRAV
Sawyer

11:19

42



November 21, 2025

Styles Regalia — The Powwows
Travel South Dakota Stories

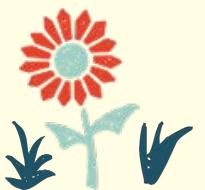
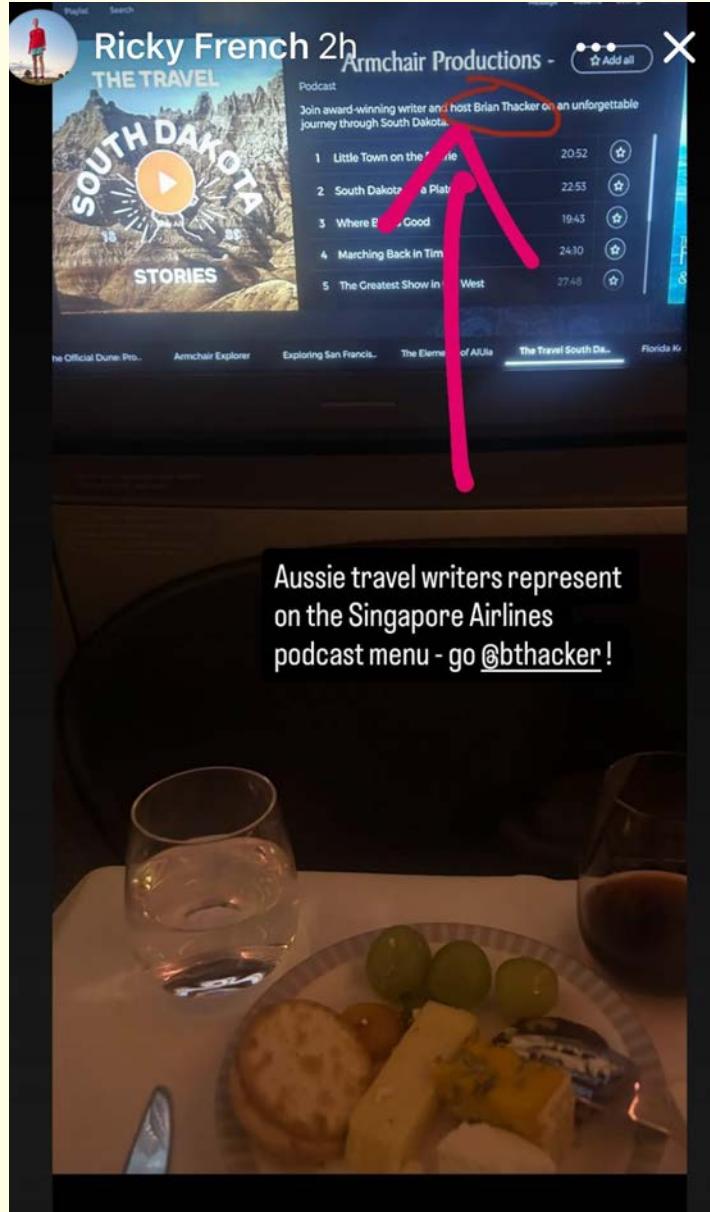
6+ YEARS
TOTAL EST. PODCAST ENGAGEMENT
TIME

124,848
TOTAL PODCAST DOWNLOADS



TRAVEL

South Dakota



11:19

42



November 21, 2025
e Styles Regalia — The Pow...
Travel South Dakota Stories

NEW RELEASES

SERIES THREE

["Heroes of the Hunt" \(dropped 11/21/25\)](#)

["The Powwow Spirit" \(11/21/25\)](#)

["The Corps of Discovery and the Teton Sioux" \(11/21/25\)](#)

[Wind and Jewel Caves \(March/April 2026\)](#)

[Agritourism \(March/April 2026\)](#)

[Sturgis Motorcycle Rally \(March/April 2026\)](#)

11:19

42



November 21, 2025

• Styles Regalia — The Powwows
Travel South Dakota Stories

FUTURE RELEASES

SERIES FOUR

[Snow & Ice \(Fall 2026\)](#)

[State of Create \(Fall 2026\)](#)

[Quiet Places \(Fall 2026\)](#)

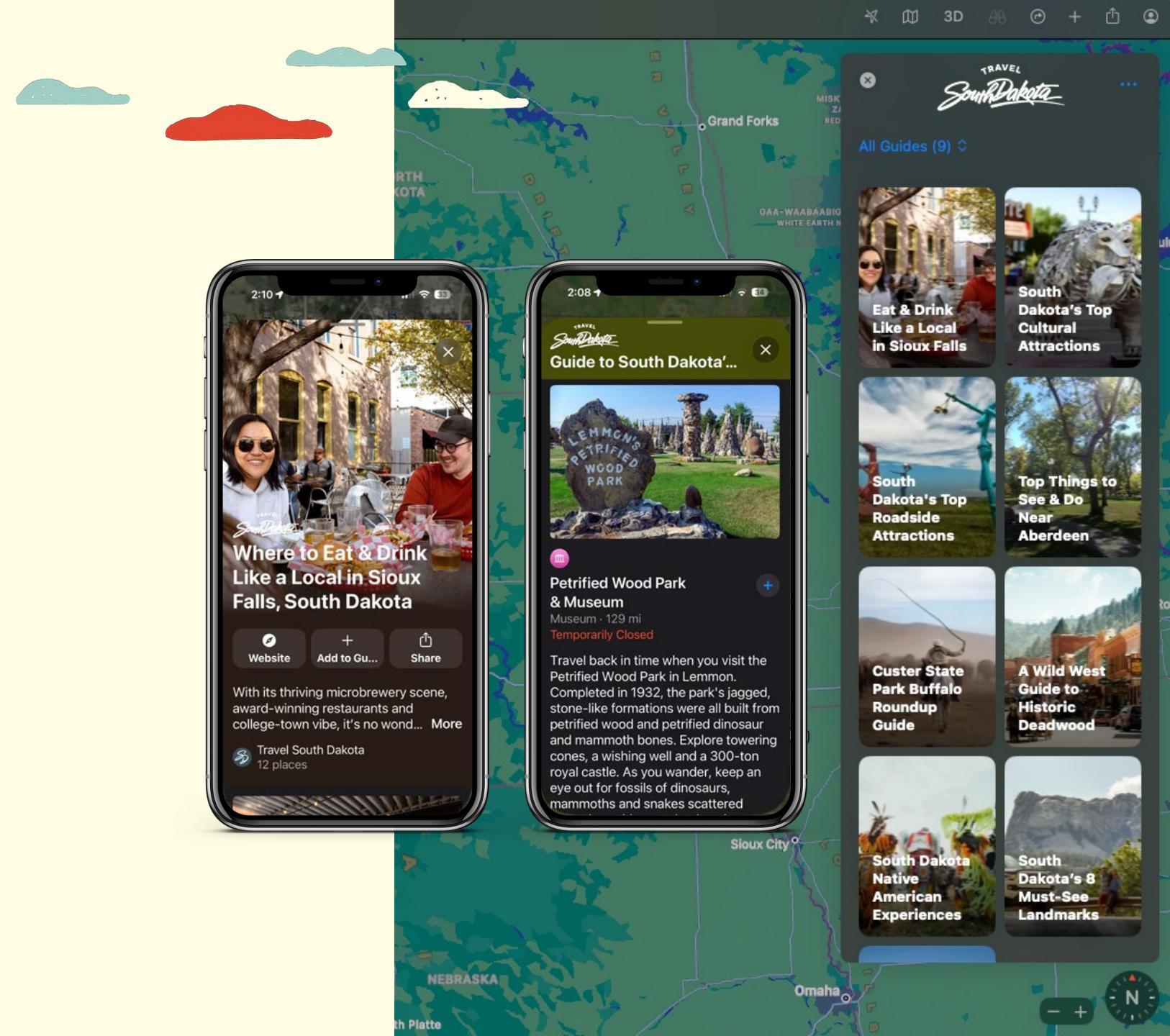
[Kid's South Dakota \(Spring 2027\)](#)

[Starry Nights \(Spring 2027\)](#)

[Unique Lodgings \(Spring 2027\)](#)

APPLE MAP GUIDES

- Eat & Drink Like a Local in Sioux Falls
- South Dakota's Top Cultural Attractions
- South Dakota's Top Roadside Attractions
- Top Things to See & Do Near Aberdeen
- Custer State Park Buffalo Roundup Guide
- A Wild West Guide to Historic Deadwood
- South Dakota Native American Experiences
- South Dakota's 8 Must-See Landmarks

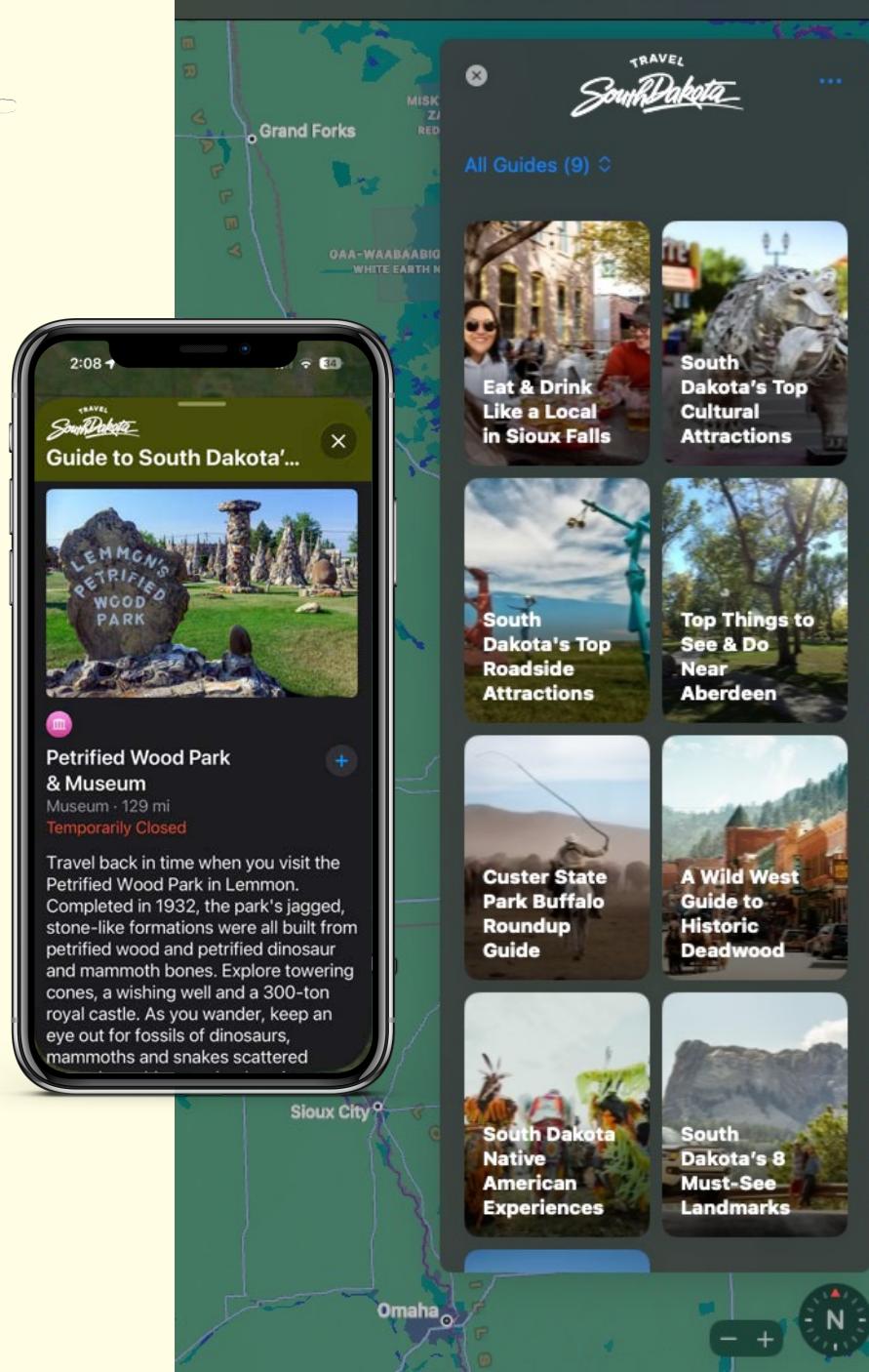




208K+

UNIQUE VIEWS SINCE Q2 2024

LEMMON PETRIFIED WOOD PARK



LEARNINGS

The addition of a giveaway was an effective means of extending a program's reach to consumers who might not ordinarily engage with branded content.

Jeep x Matador

- Landing page traffic blew away estimate. Ended with more than **120k views**
- Giveaways resulted in **30k+ opted-in emails**.

"South Dakota Stories" Podcast

- **13,041 signups** for giveaway. **30% email opt-ins** with provided interest segments.
- **79k+ pageviews** (23.4k+ organic, 58.7% of traffic from cross-channel promotions)



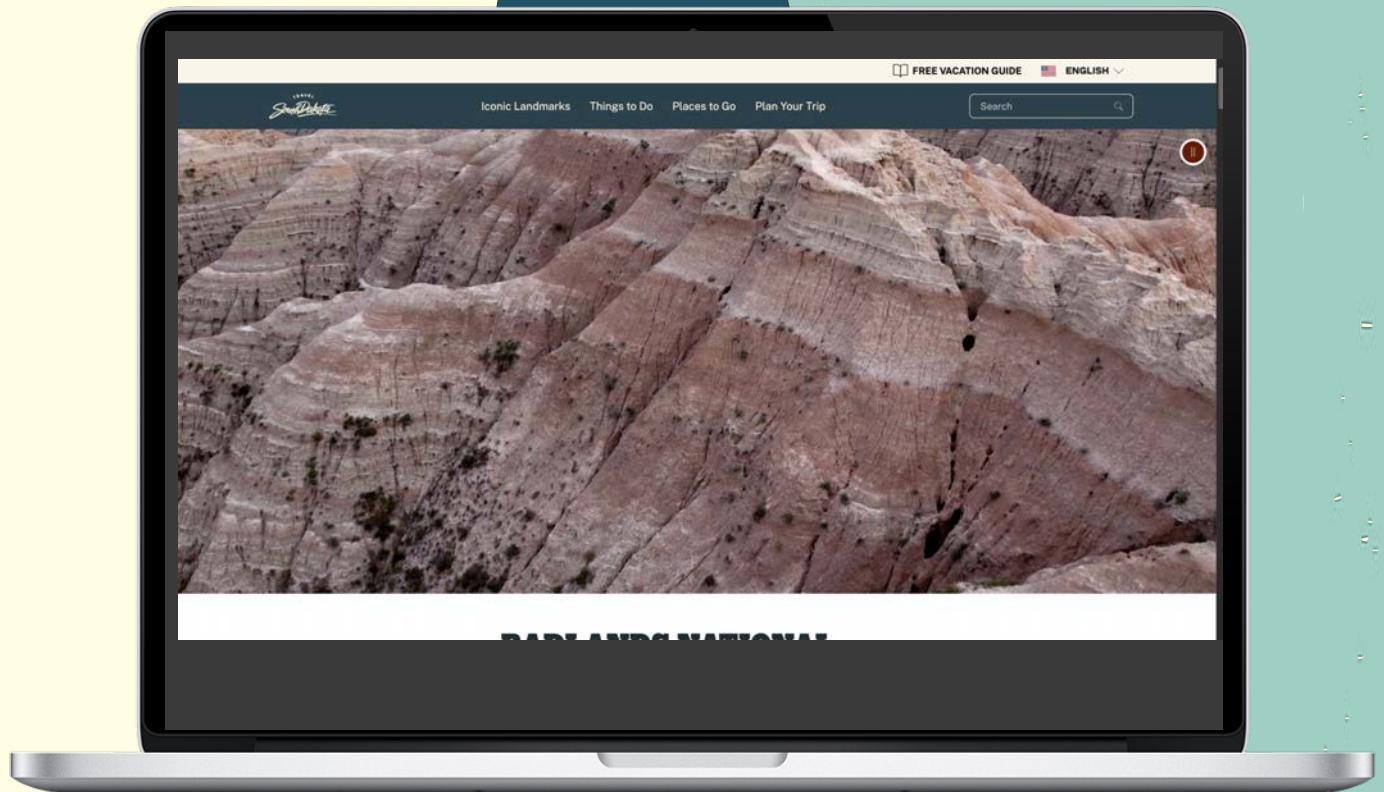


GOING FORWARD

Custom Landing Pages

Mindtrip AI Integration

SEO + GEO





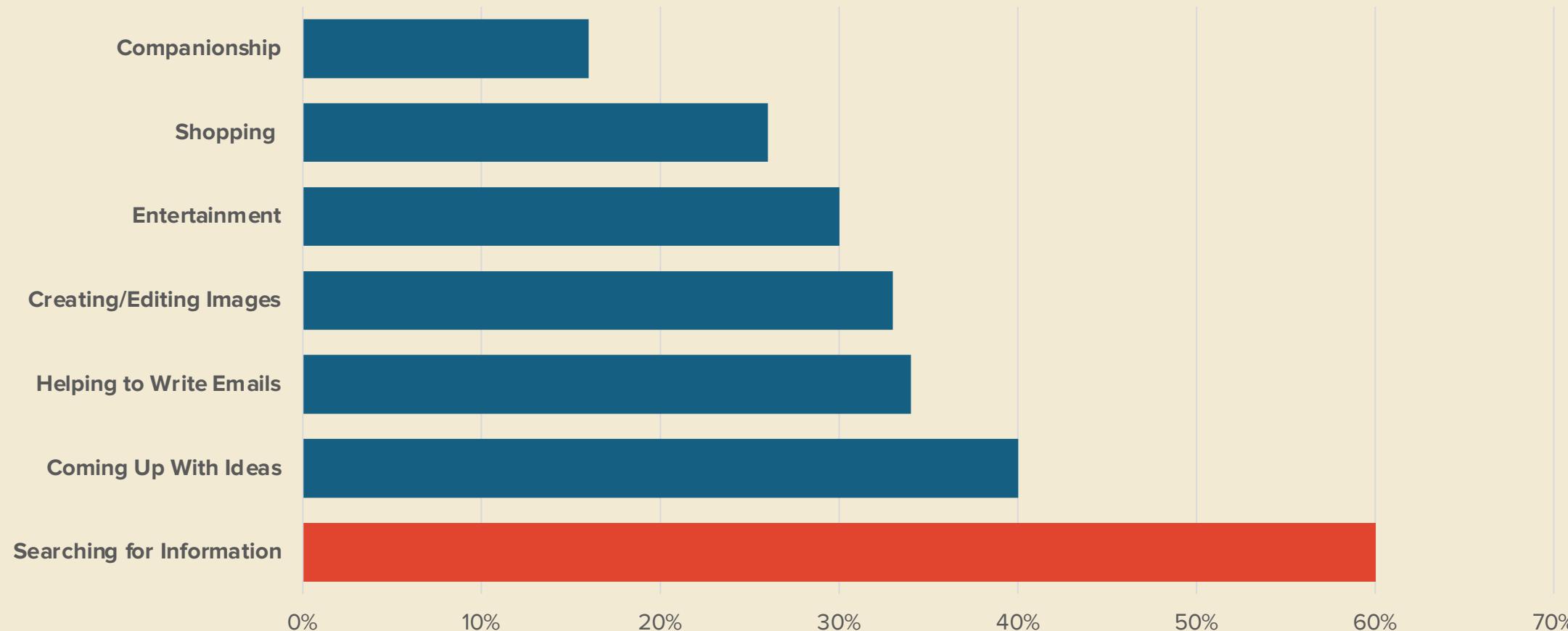
GEO > SEO

"SEO still matters, but it shifts toward clarity and structure," It's less 'rank me' and more 'use me.'"

- Steve Miller, senior vice president, executive creative director, and partner at FUSE Create

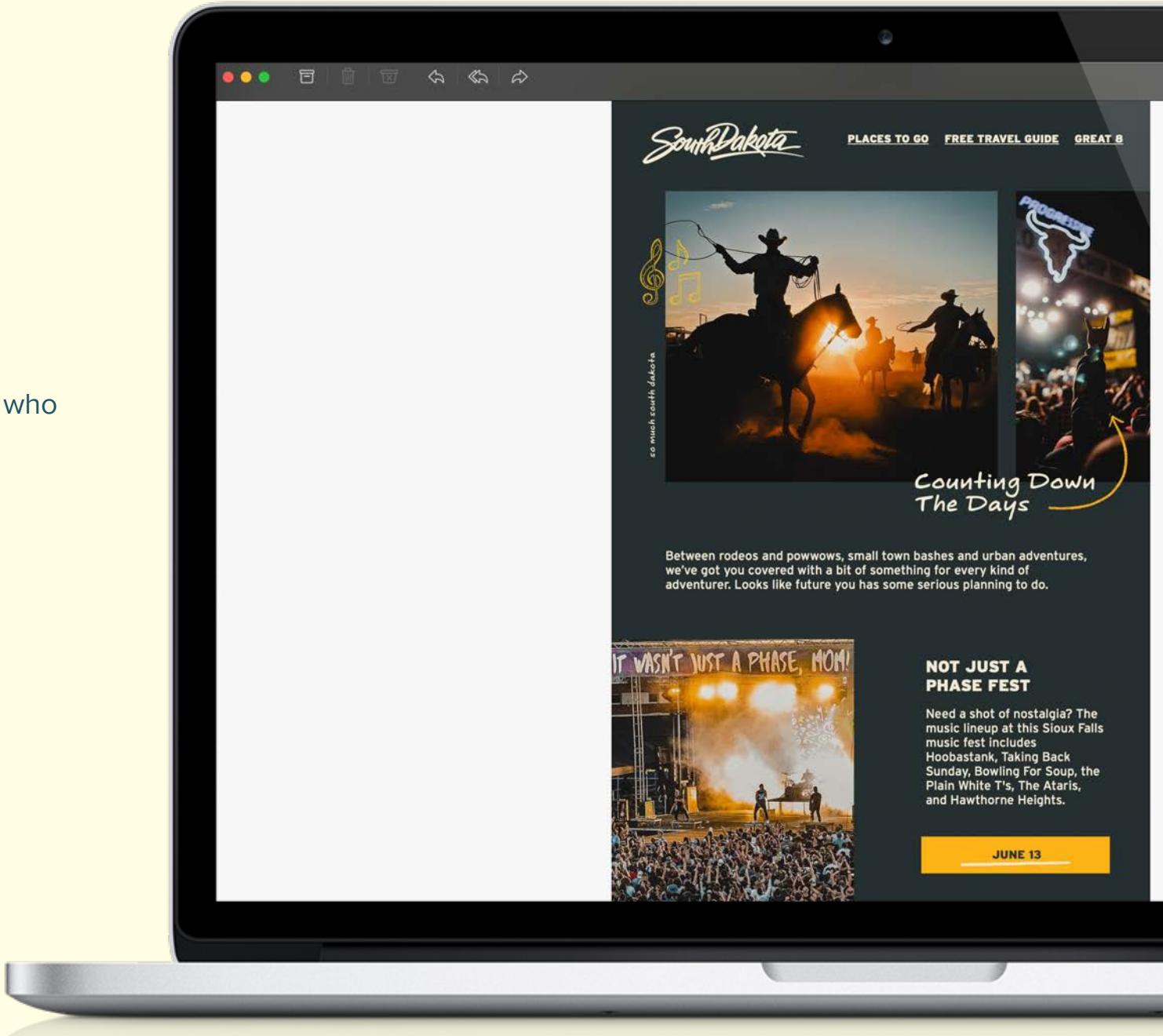


More Americans Report Using AI for Search Than for Any Other Purpose



EMAIL PROGRAM

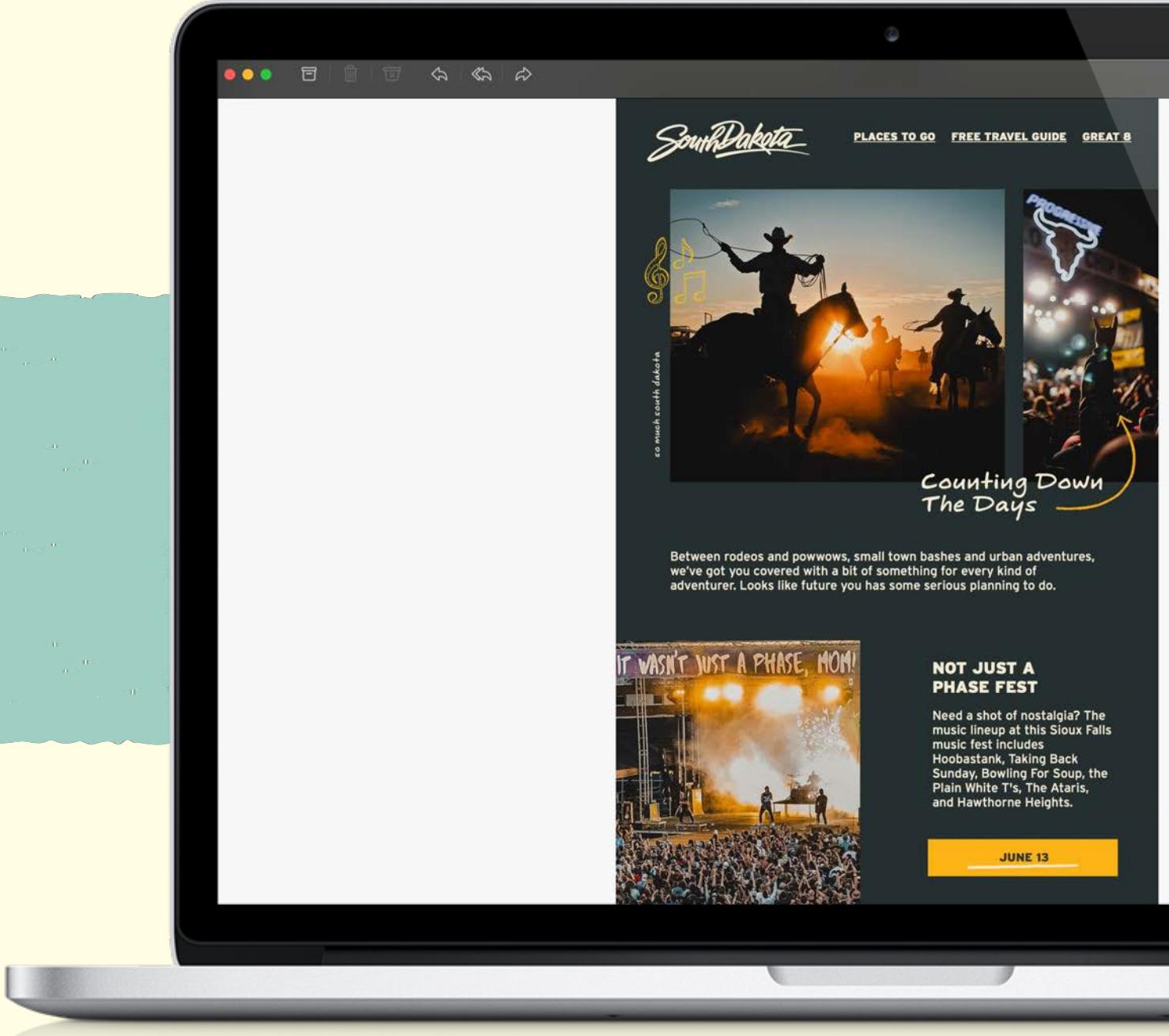
Email continues to serve as a key driver of intent — users who engage are not just browsing, they're actively planning.



EMAIL PROGRAM

20M+

TOTAL 2025 SENDS



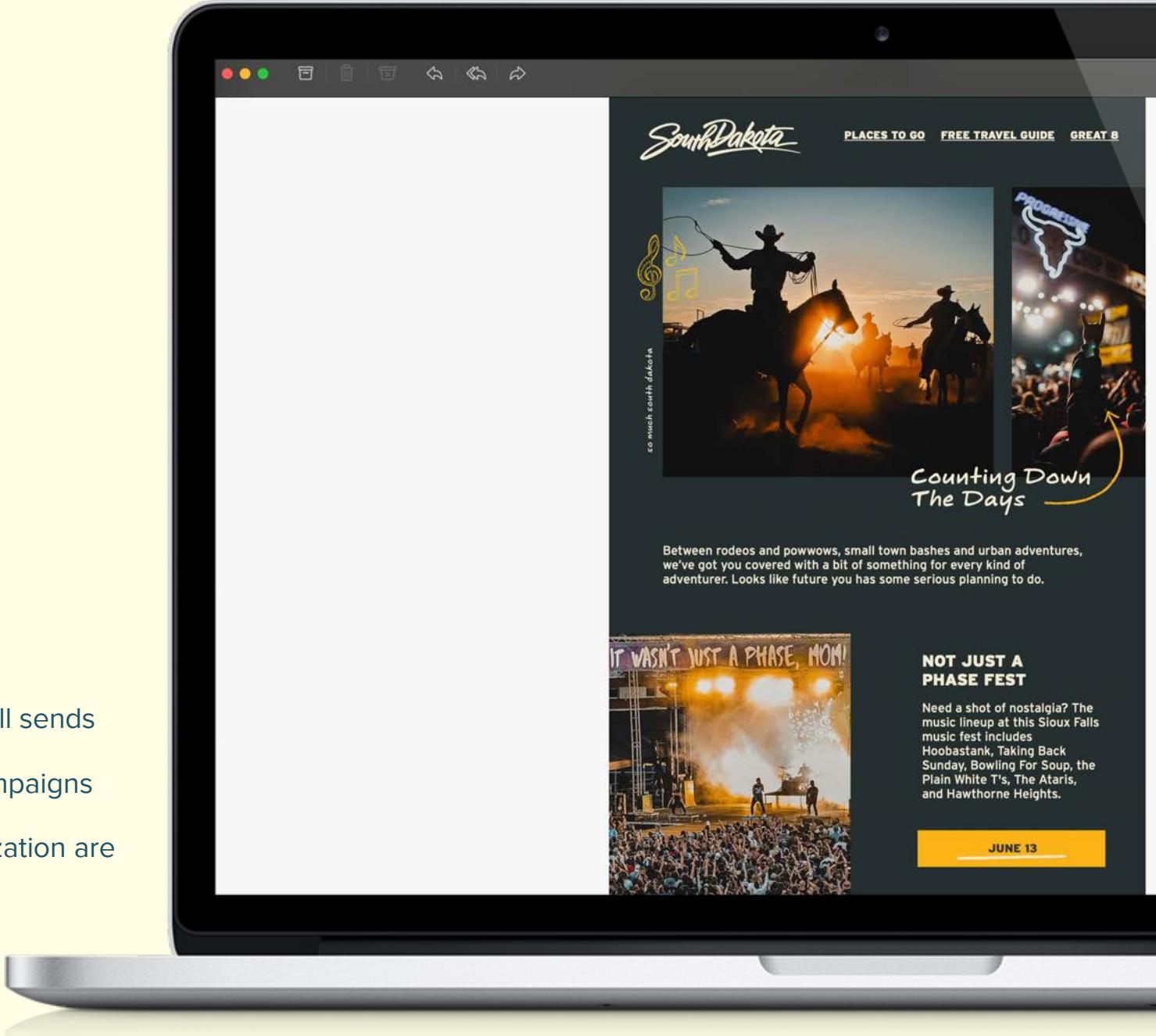
AUTOMATED JOURNEYS OVERVIEW

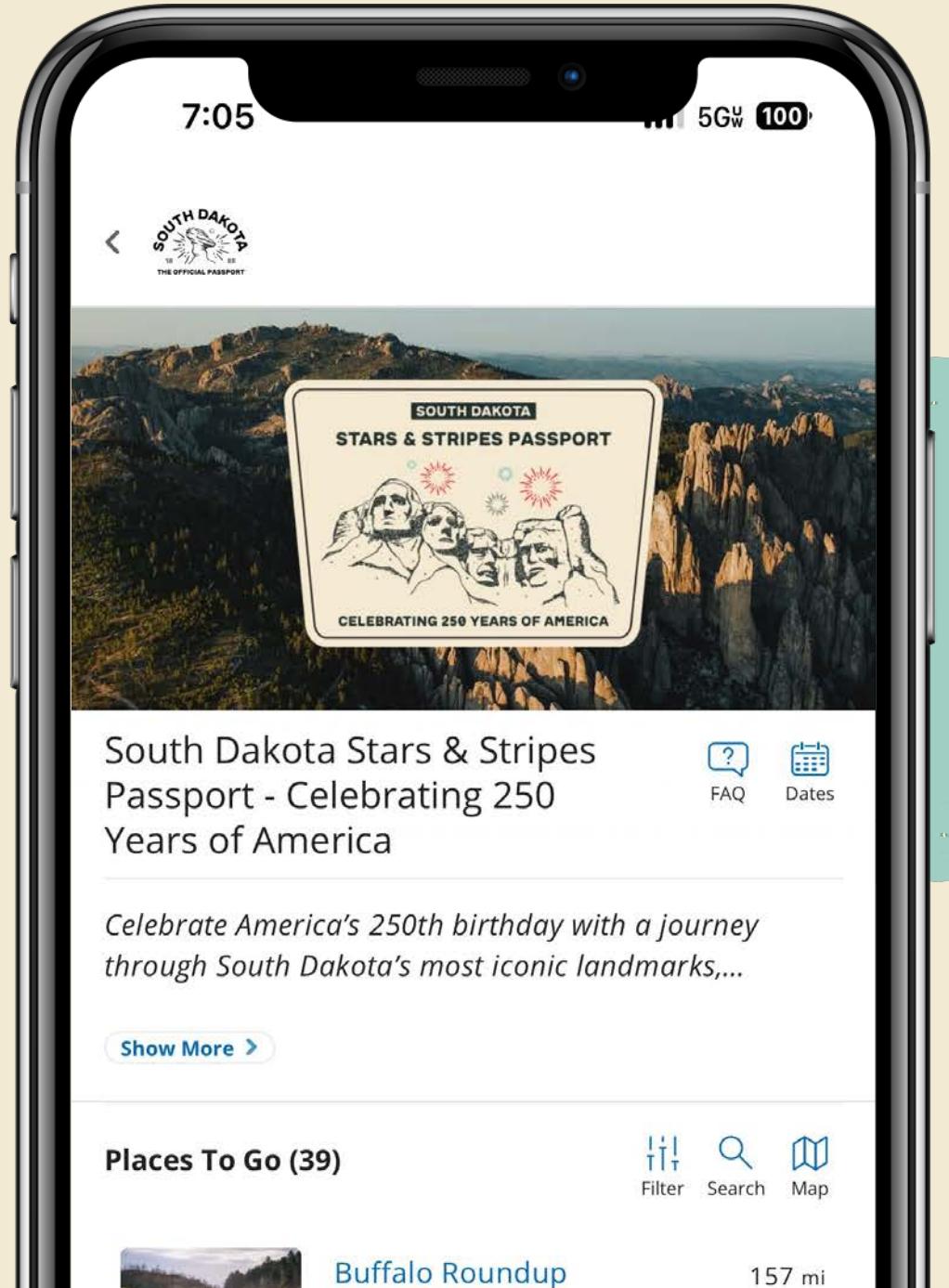
Journeys YOY:

- More emails sent (+61K)
- 38.57% → 42.01%

Why this matters:

- Journey open rates are ~14 points higher than overall sends
- Journey click rates are 3x+ higher than standard campaigns
- Improvements YOY suggest automation + personalization are compounding





TOTAL 2025 PASSPORT
LOCATION CHECK-INS



FOREVER





FOUR PILLARS

1. Support Local
2. Explore Beyond
3. Honor Culture
4. Preserve Nature



CLICK TO PLAY! 



4,620+

EST HOTEL BOOKINGS

\$26:1

ROAS



QUESTIONS?

MIKE.GUSSIAAS@TRAVELSOUTHDAKOTA.COM