



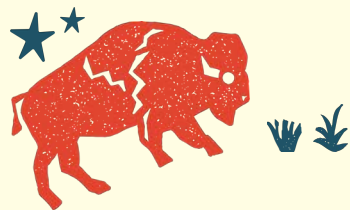
**2026 SOUTH DAKOTA
GOVERNOR'S CONFERENCE
ON **TOURISM****

TRAVEL
South Dakota

JANUARY 20, 2026

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

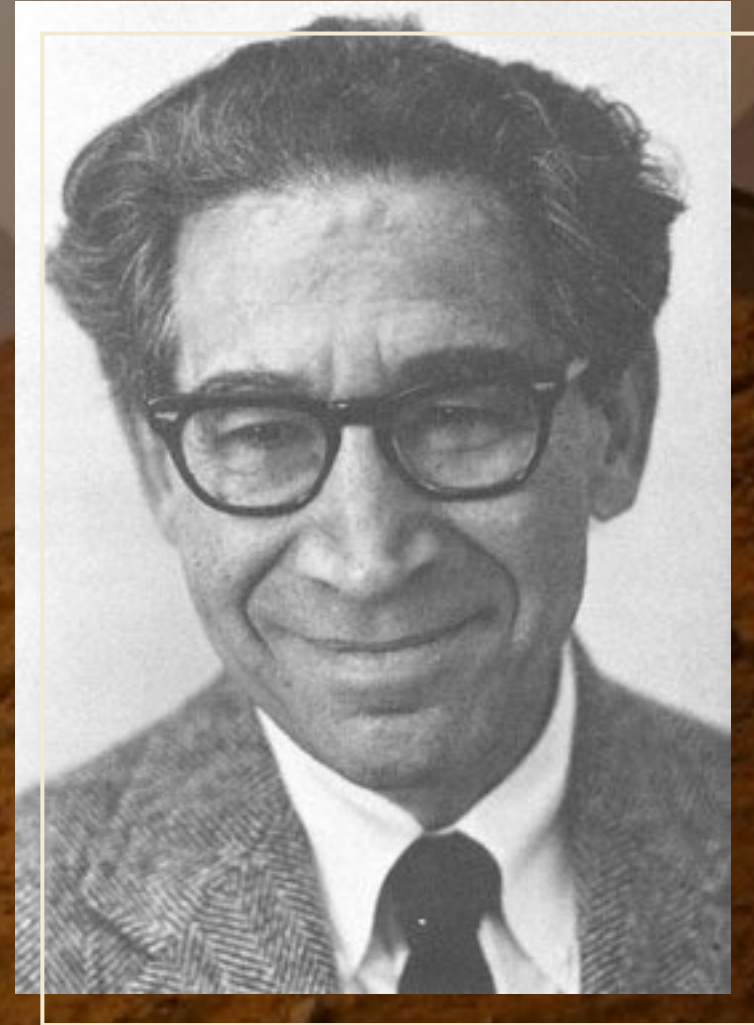
A person is riding a horse through a vast, sandy desert landscape. In the background, the Great Pyramids of Giza are visible under a hazy, orange-tinted sky. The scene is captured from a low angle, emphasizing the scale of the pyramids and the isolation of the desert.

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.



A woman with blonde hair, wearing a white patterned jacket, is in the foreground of an airport terminal. She has a stressed expression, with her hands covering her face and looking off to the side. The background is a blurred airport scene with other travelers and luggage.

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.



CLICK TO PLAY 
FOCUS GROUP CLIP!

OUR CHALLENGE:

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

A photograph of a hotel room. In the foreground, a large bed with white linens is visible. A blue and white geometric patterned pillow is placed on the bed. To the left of the bed, there is a brown armchair with a pink cushion. To the right, a wooden nightstand holds a lamp with a white shade. The background shows a window with curtains and another lamp.

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.”

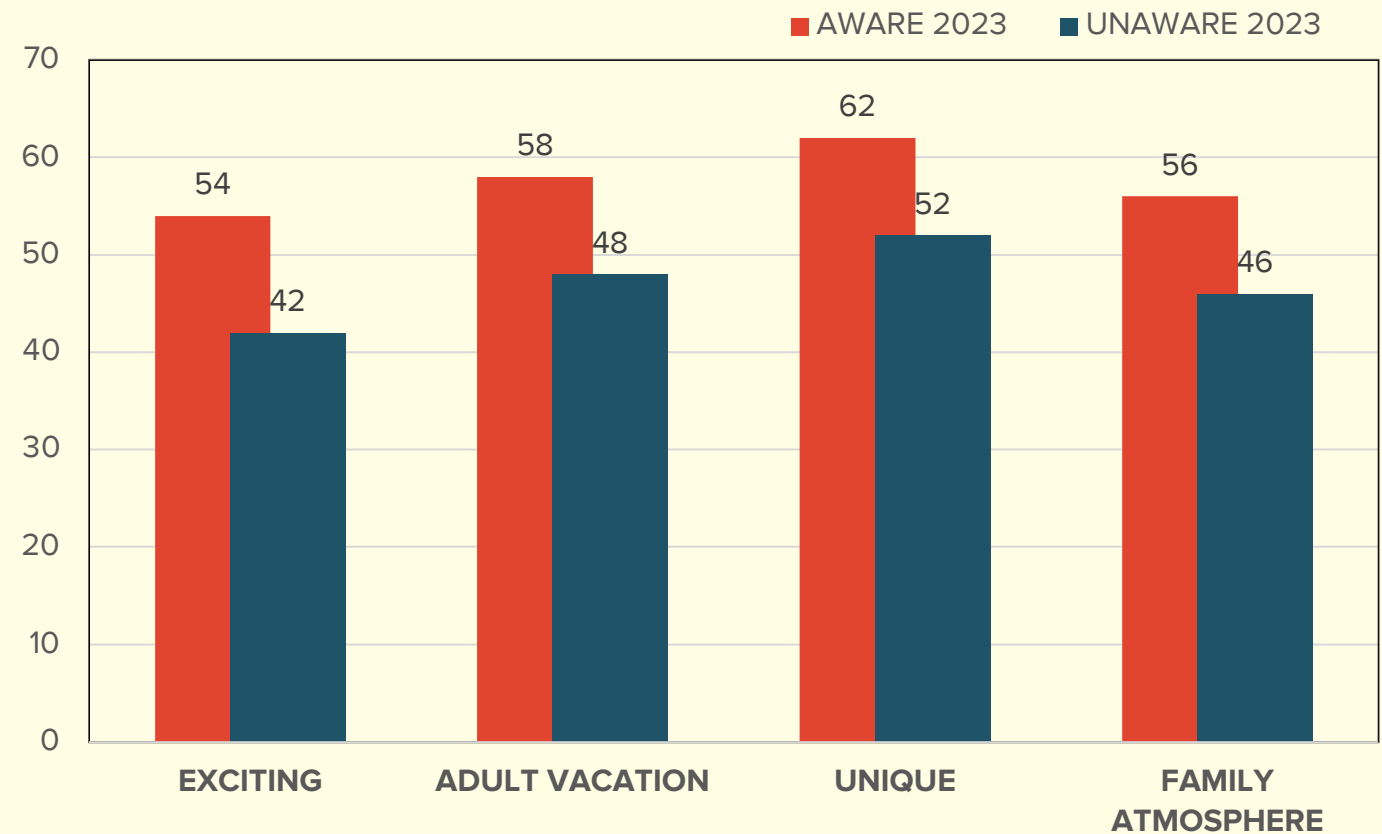


ADVERTISING IMPACT ON IMAGE

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!





FREE TO ROAM



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**



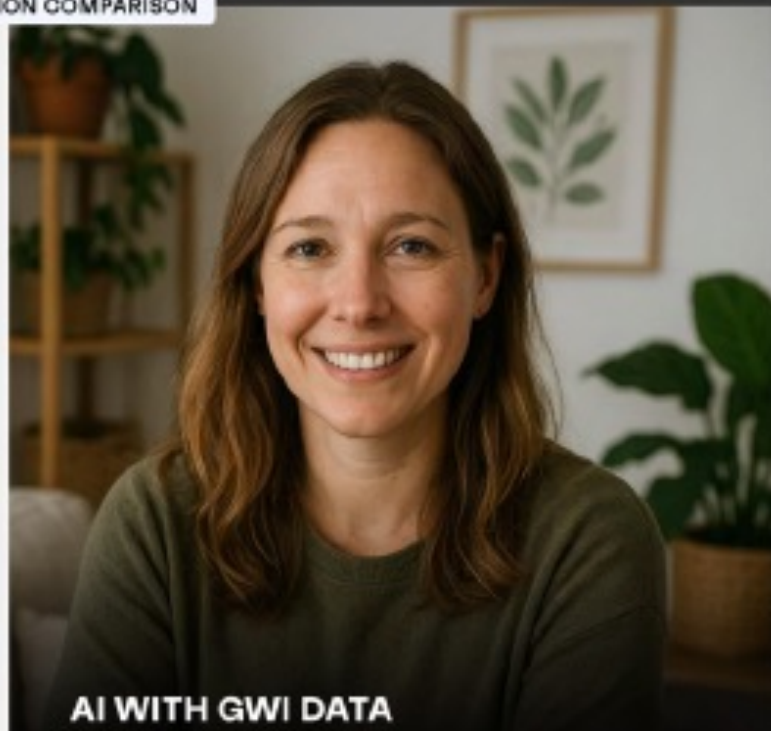
"What does the average US country music fan look like?"

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:

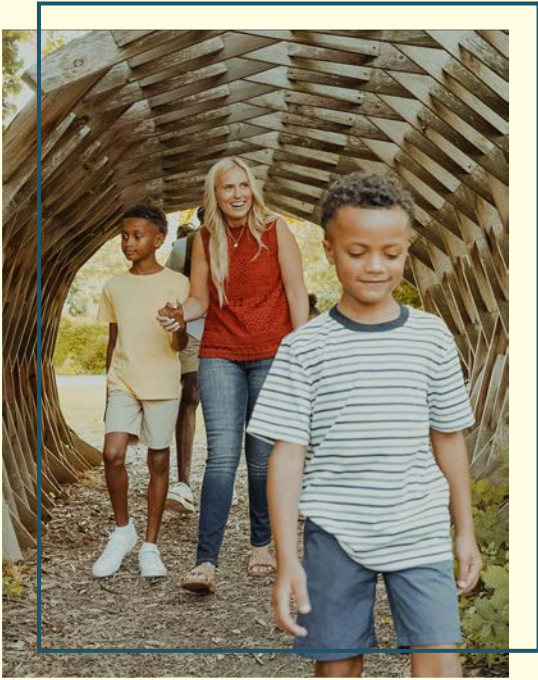
“What does the average visitor to South Dakota look like?”





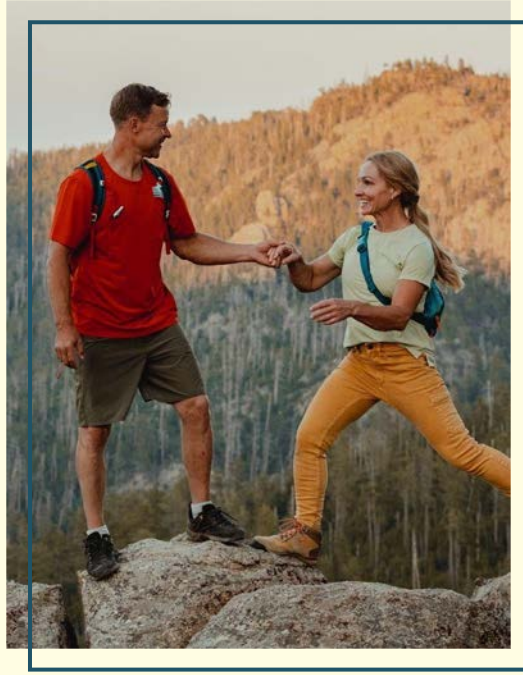
THE MYSTERY- STARVED TRAVELER

OUR AUDIENCES



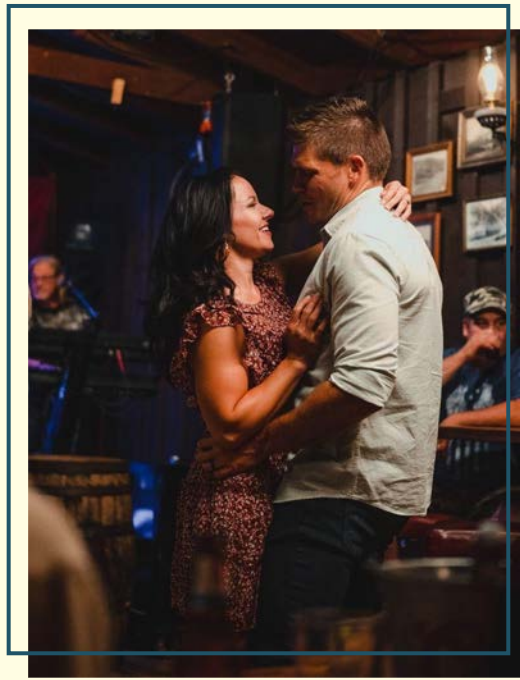
MEMORY MAKERS

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



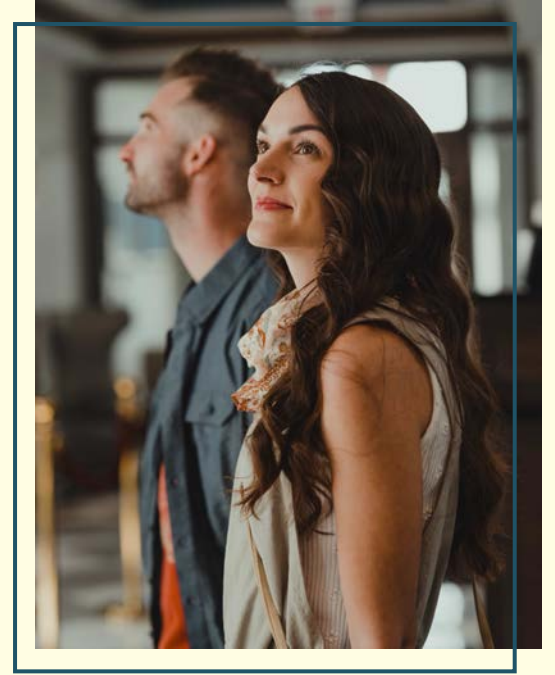
MOMENT SEEKERS

- 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



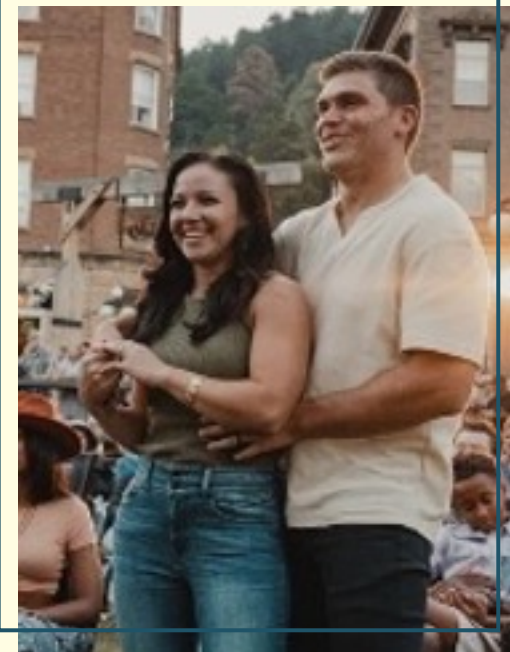
HUNTING (GENERAL)

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



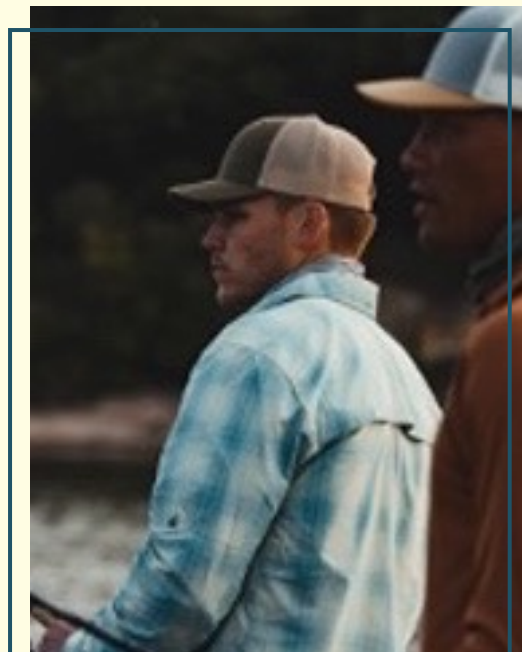
MOTORCYCLE ENTHUSIASTS

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



ENTERTAINMENT ENTHUSIASTS

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

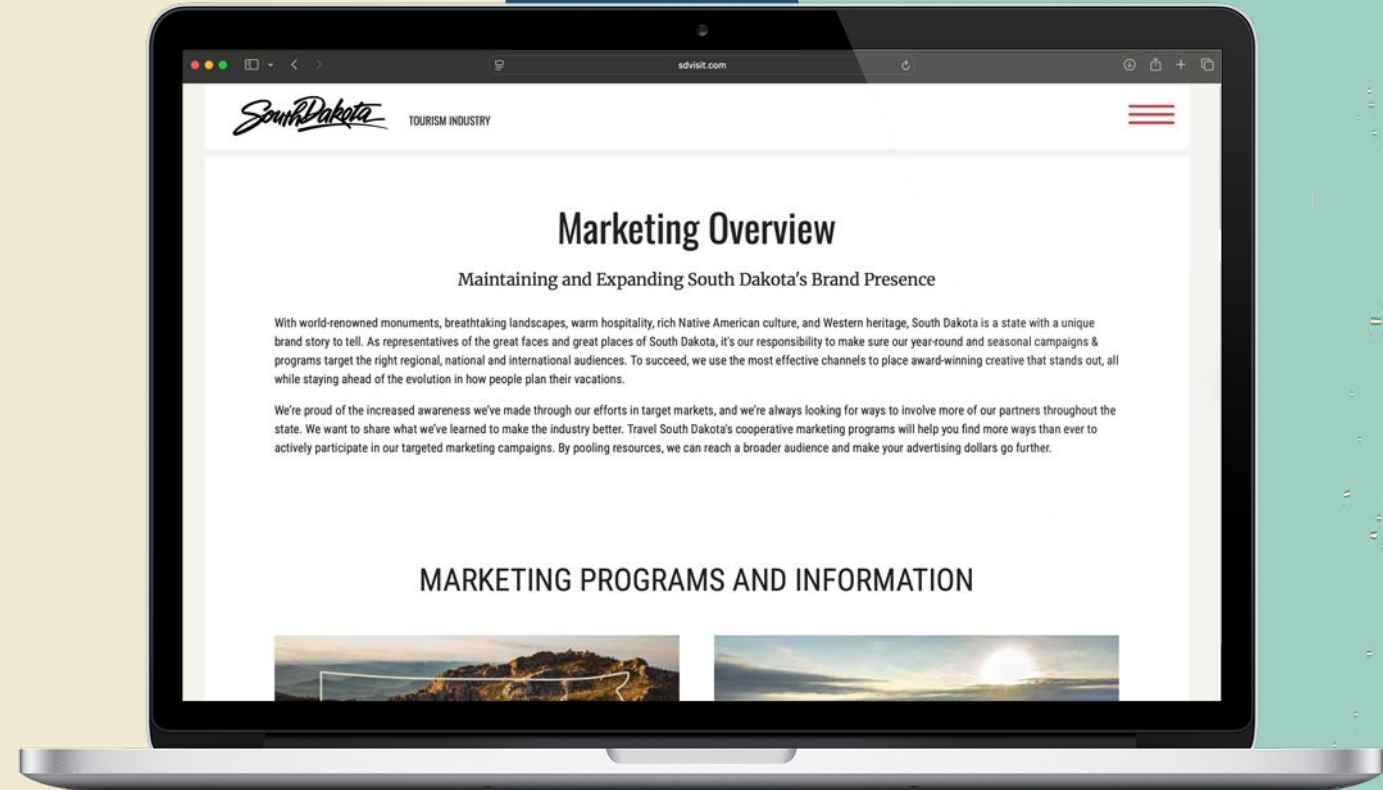


FISHING (GENERAL)

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



RESOURCES AVAILABLE ON SDVISIT.COM



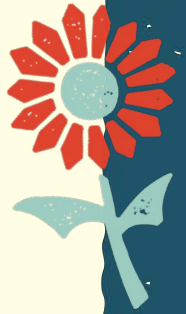
2026 INTERNATIONAL TARGETS



The Consumer's Decision-Making Process

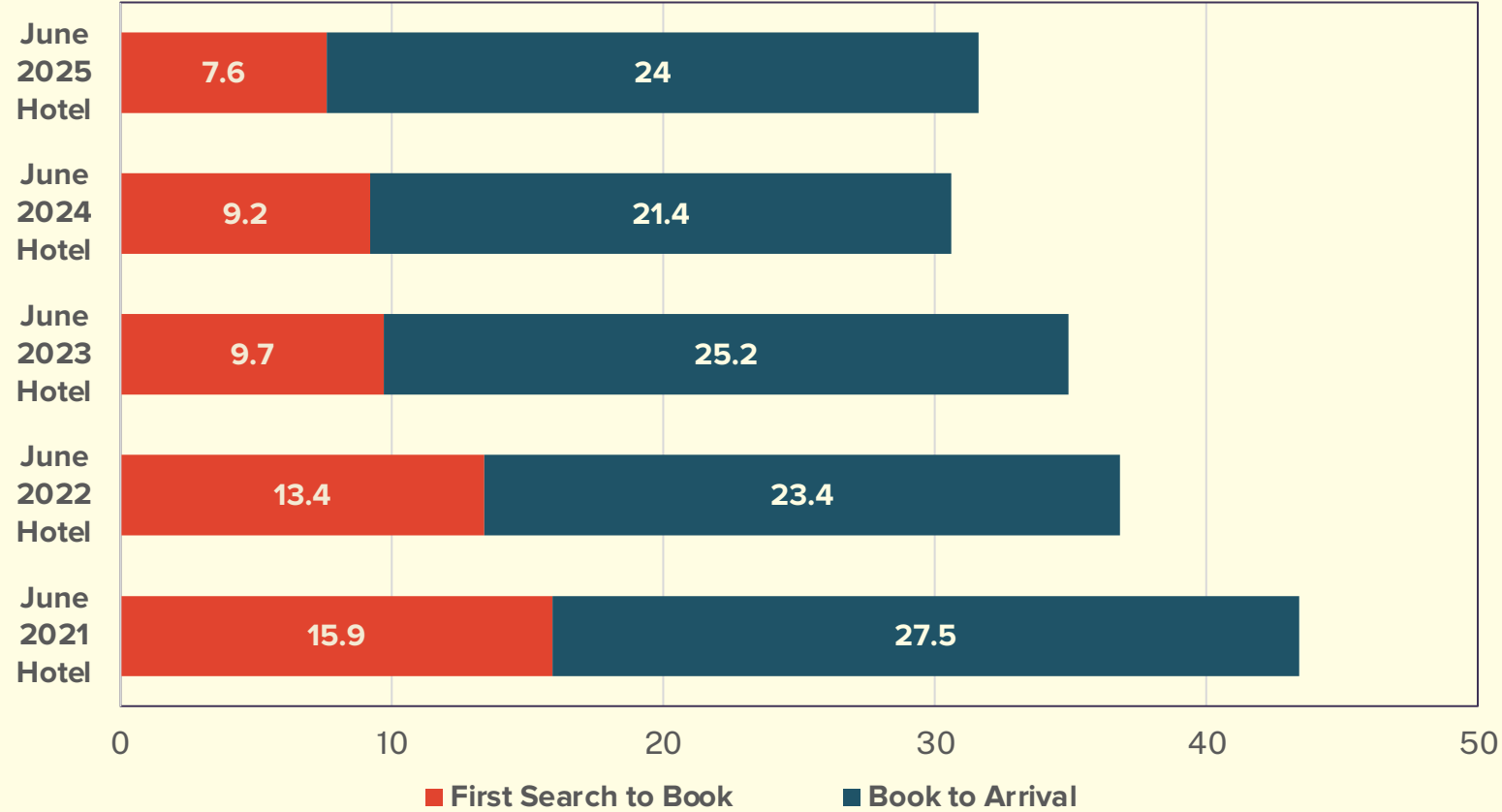
"Purchase intent often builds in the background, especially for high-consideration items, and isn't always declared. The binary between planned and impulsive falls apart when we recognize most purchases happen when intent reaches a "tipping point of confidence."

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

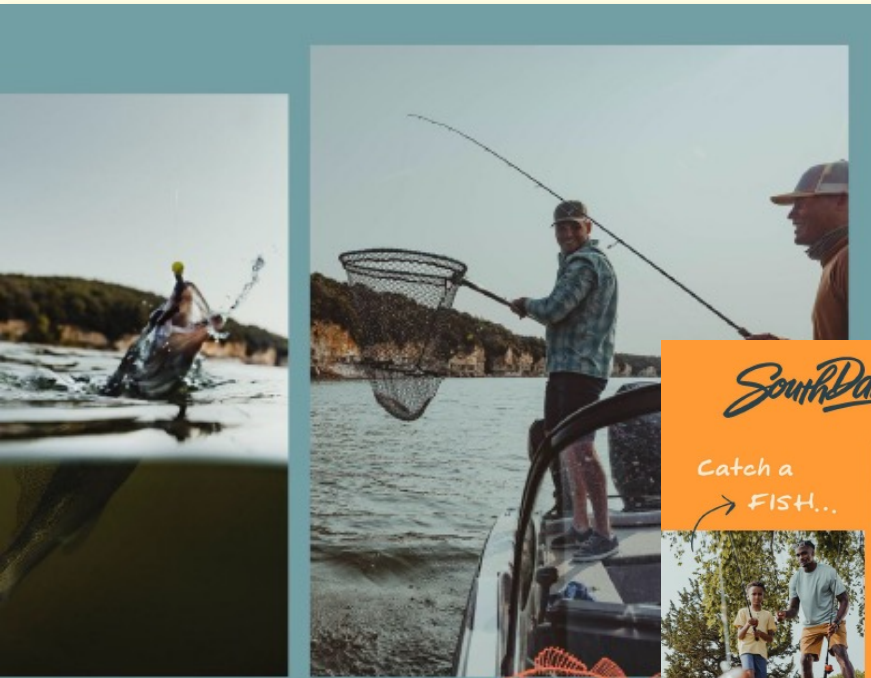




HOTEL TRIP PLANNING WINDOWS 2021-2025



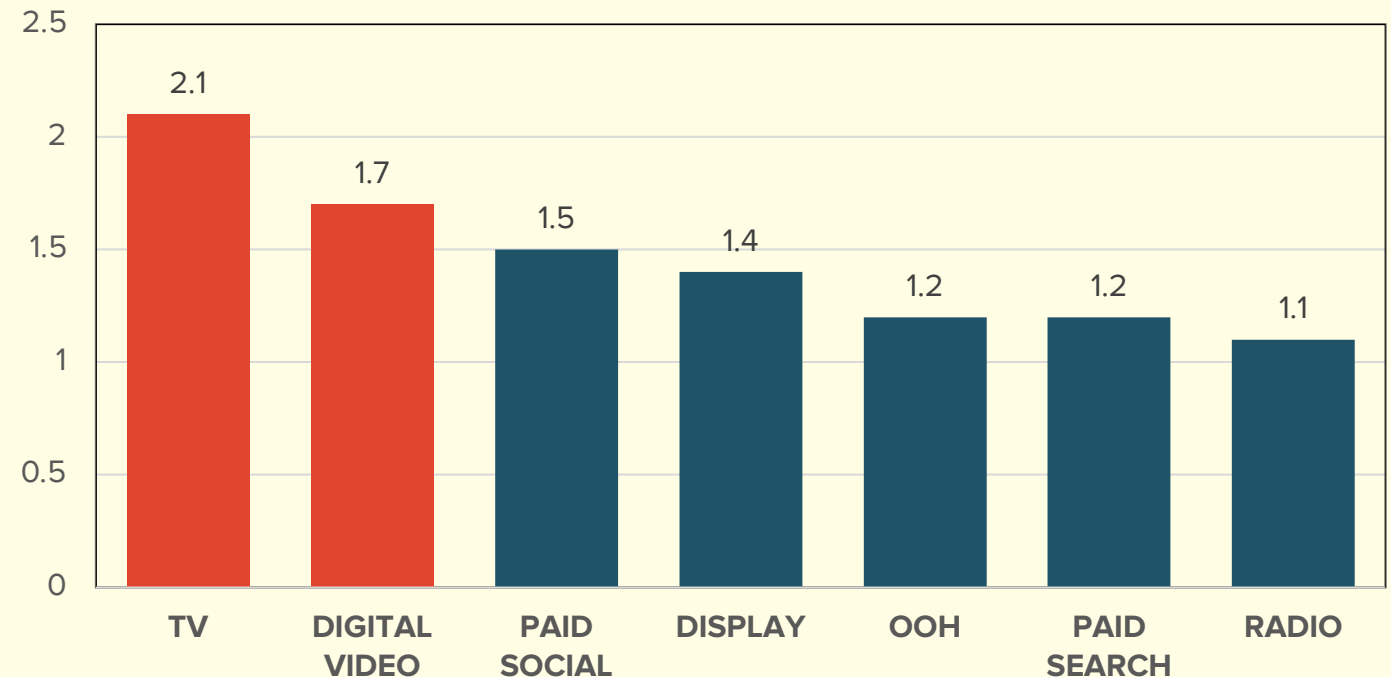
Source: ADARA Impact



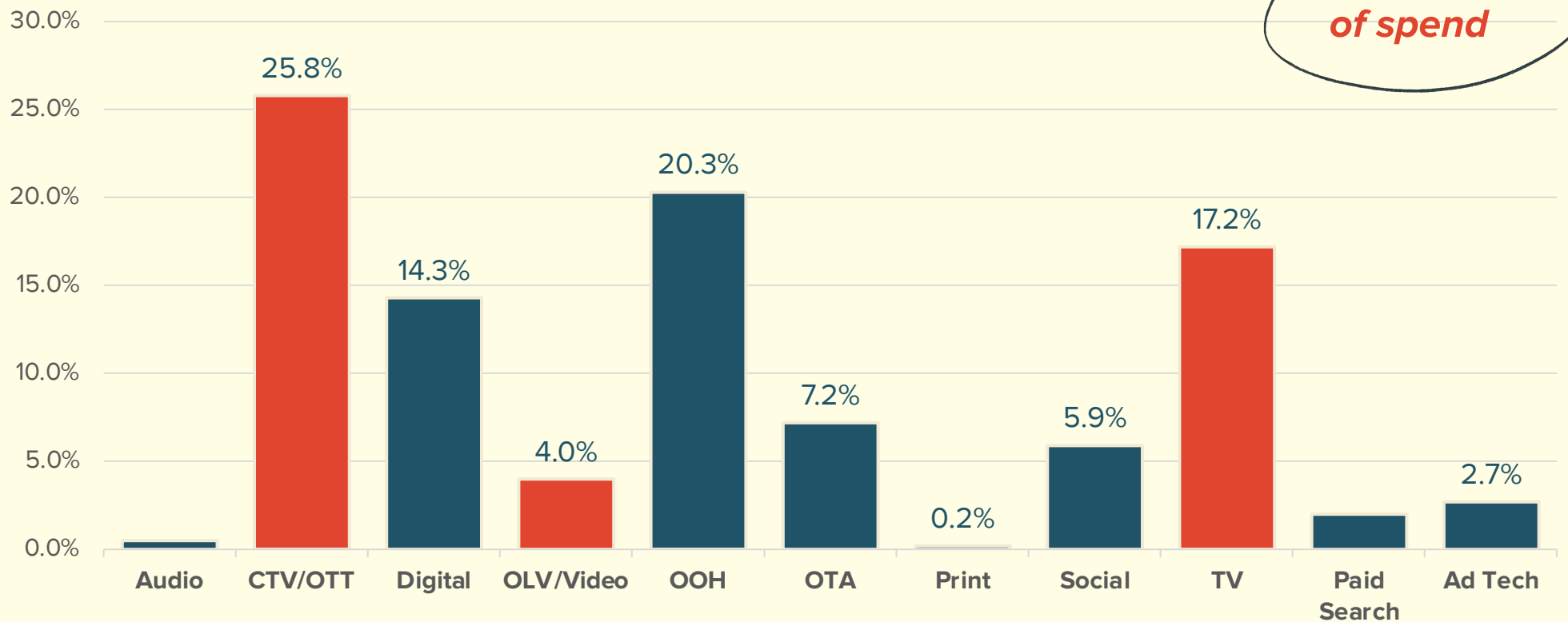
BRAND BUILDING IS CRITICAL FOR LONG-TERM ROI

NIELSEN BENCHMARKS LONG-TERM ROI MULTIPLIERS

Source: Nielsen Compass



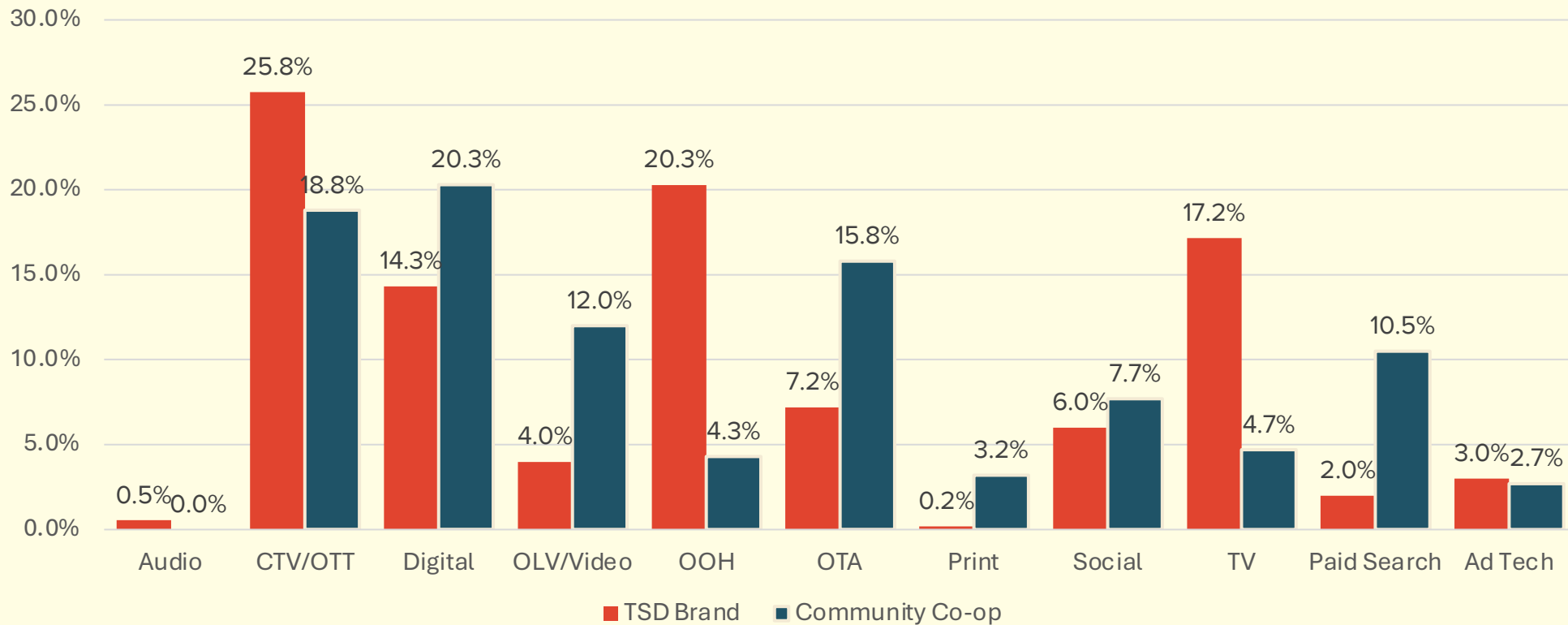
FY26 TSD BRAND MEDIA MIX



2026 COMMUNITY CO-OP PARTNERS



FY26 MEDIA MIX TSD vs CO-OP



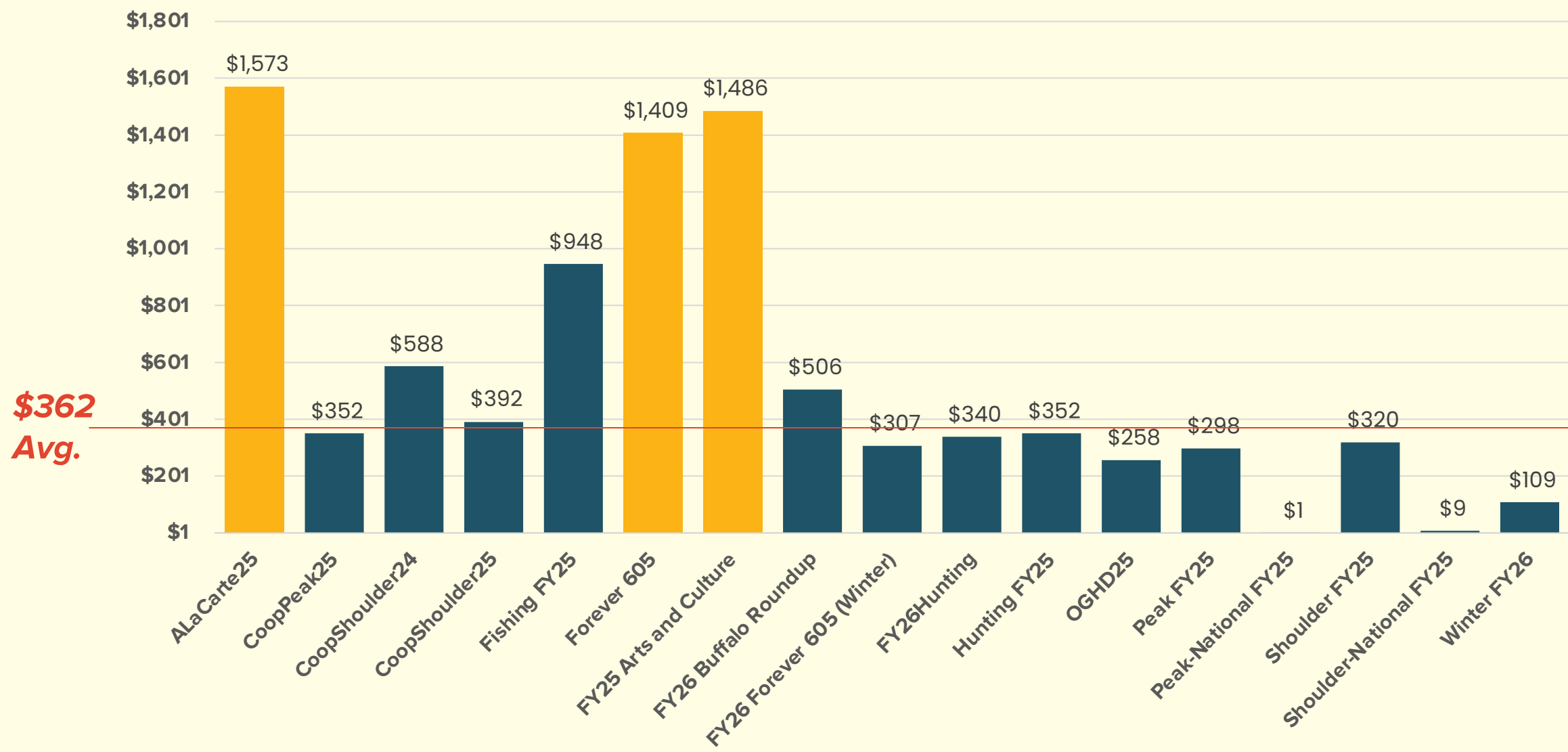


\$82M+

TOTAL EST BOOKING REVENUE IN
2025 FROM CO-OPS

45% OF TOTAL

REVENUE BY CPM 2025 CAMPAIGNS



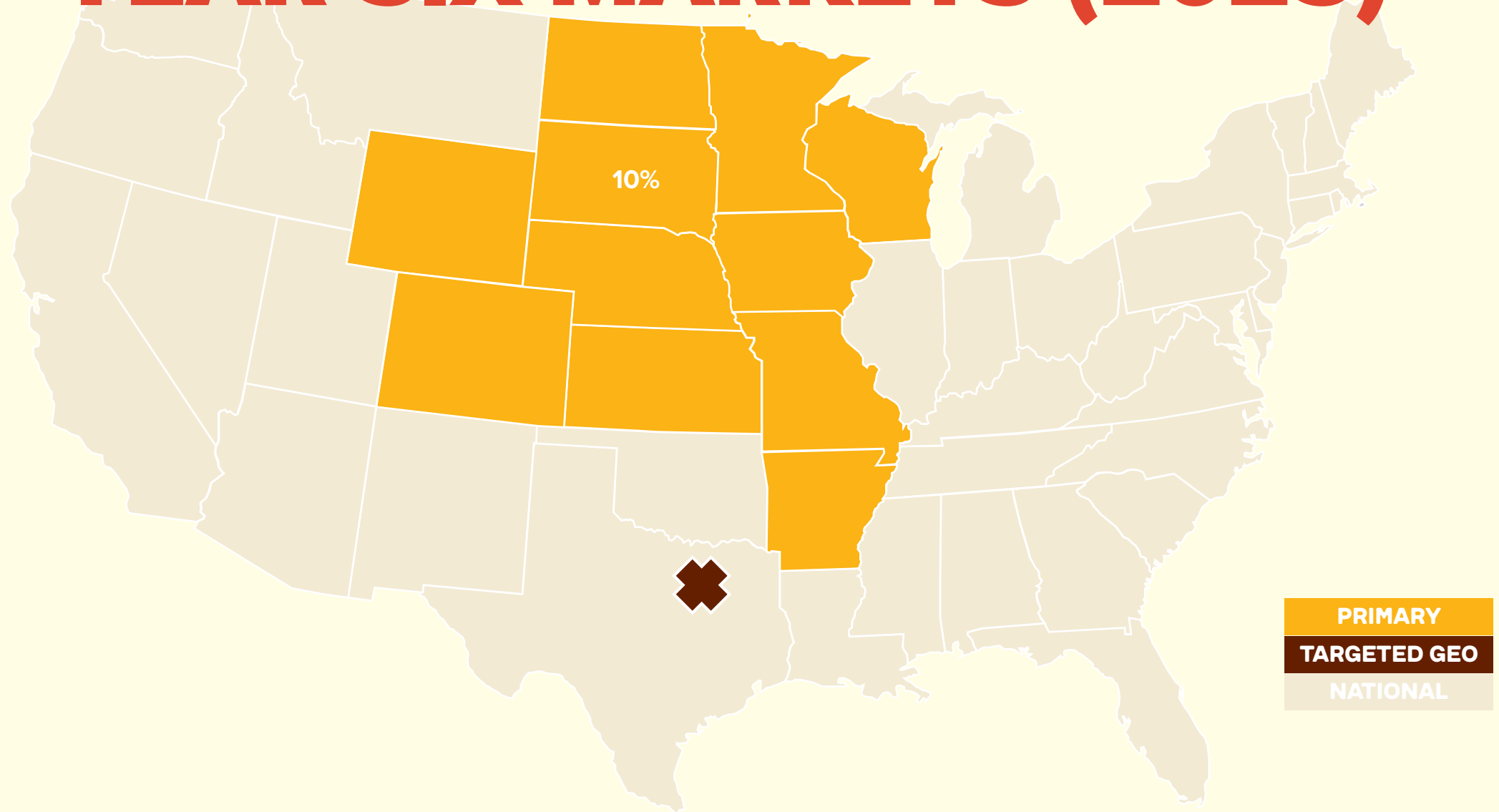
A group of four hunters, three men and one woman, are posing in a field with a large haystack in the background. They are all wearing orange safety gear and holding pheasants. Three dogs are also present, wearing orange vests. The text "WHAT'S GREATER THAN THAT?" is overlaid in the center, with "GREATER" circled in orange.

WHAT'S GREATER
THAN THAT?

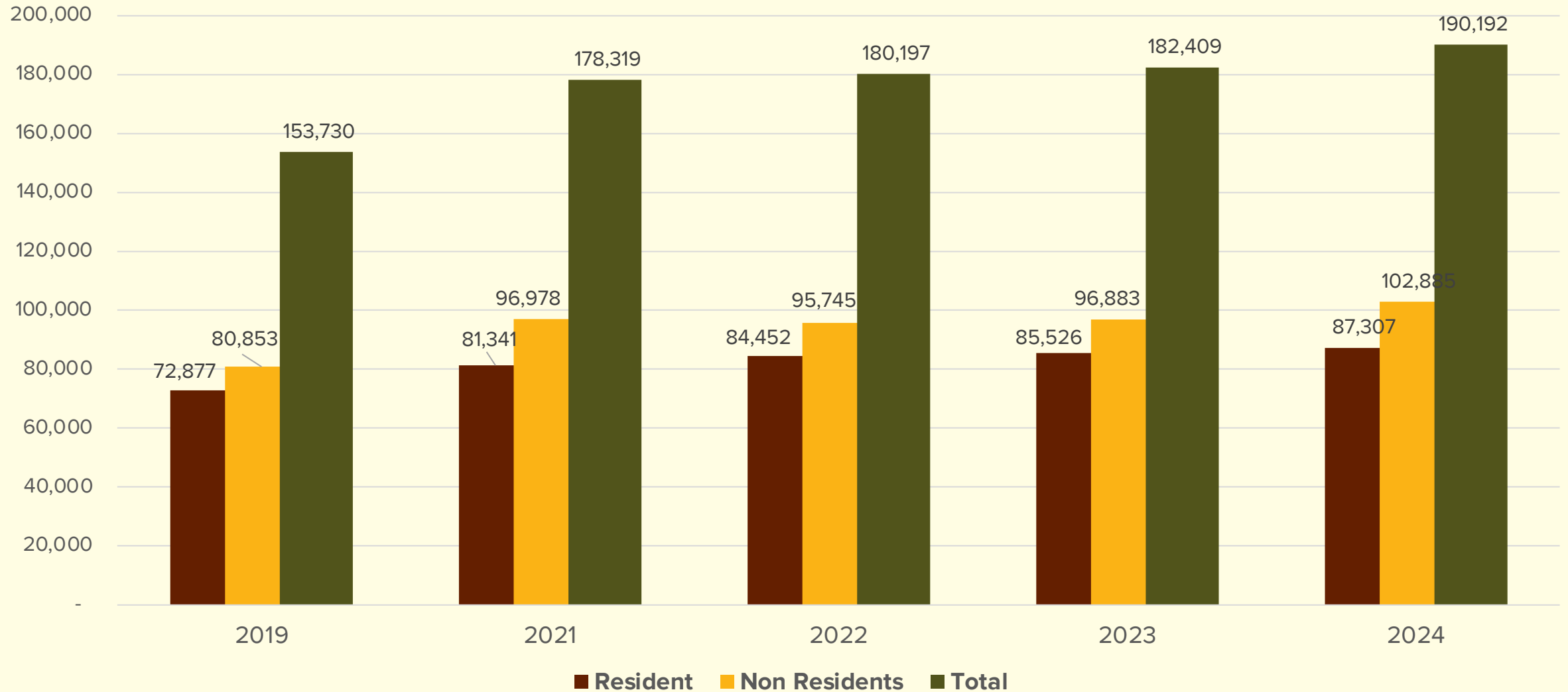


CLICK TO PLAY! 

YEAR SIX MARKETS (2025)

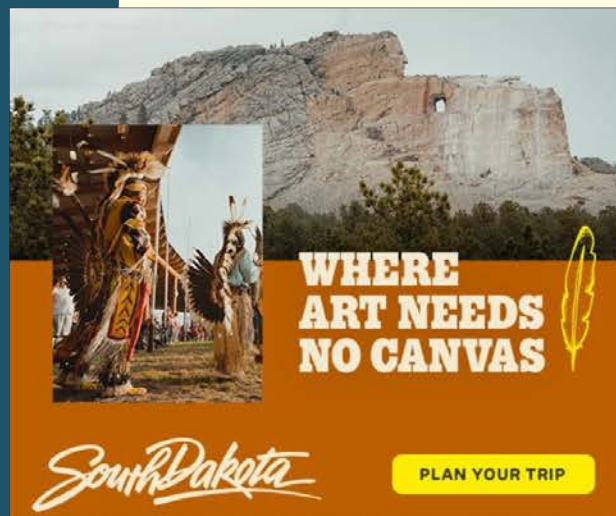
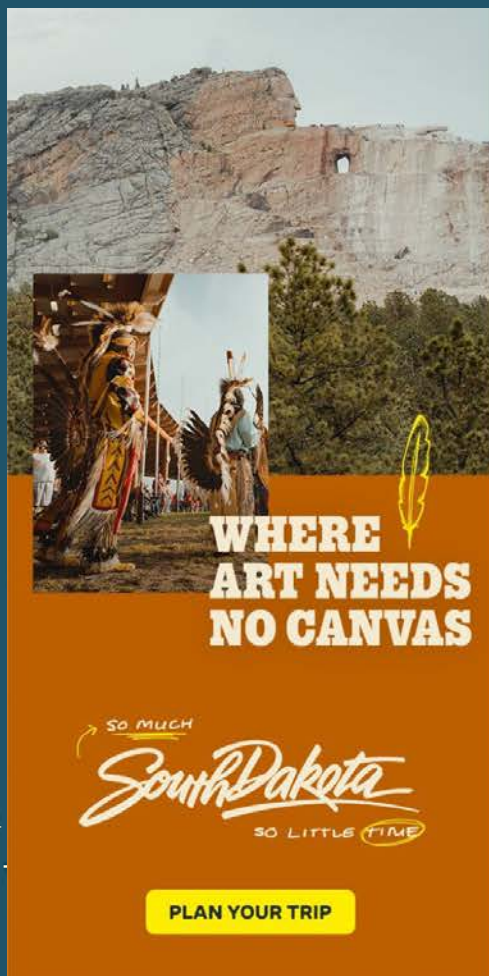


LICENSE TRENDS – 5YR LOOK



A photograph of three dogs playing in shallow water. A light-colored dog in the center is holding a stick in its mouth. To its left is a dark brown dog with its tongue out, and to its right is a black dog. The background is a blurred body of water.

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



2 OF TOP 3

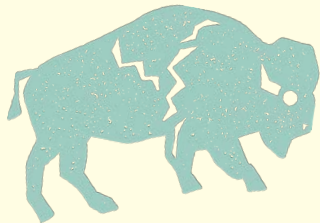
ADS LEADING IN AWARENESS AND
RECALL FROM THE 2023
LONGWOODS "ADVERTISING ROI
STUDY" STRONGLY FEATURED
NATIVE OFFERINGS

Source: Longwoods Advisors

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

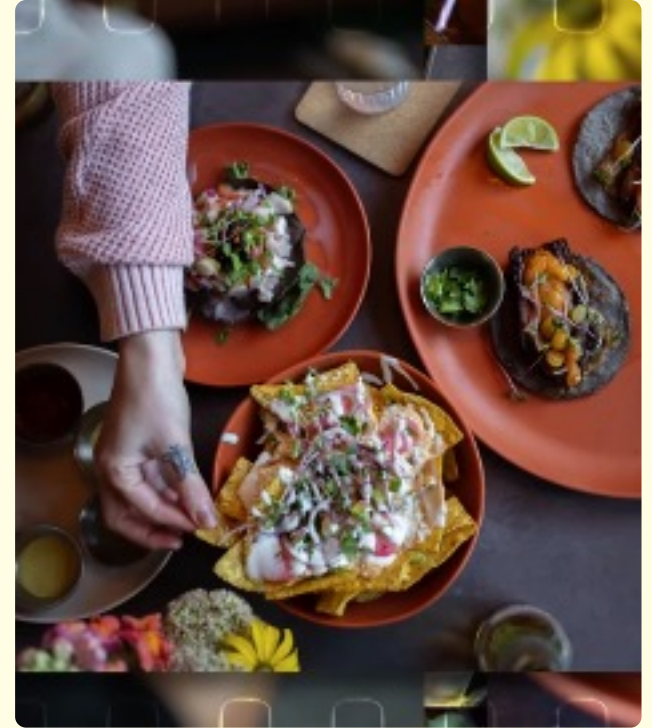
669k+

TOTAL ORGANIC
ENGAGEMENTS

54+ Years

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

100,000,000+ HOURS

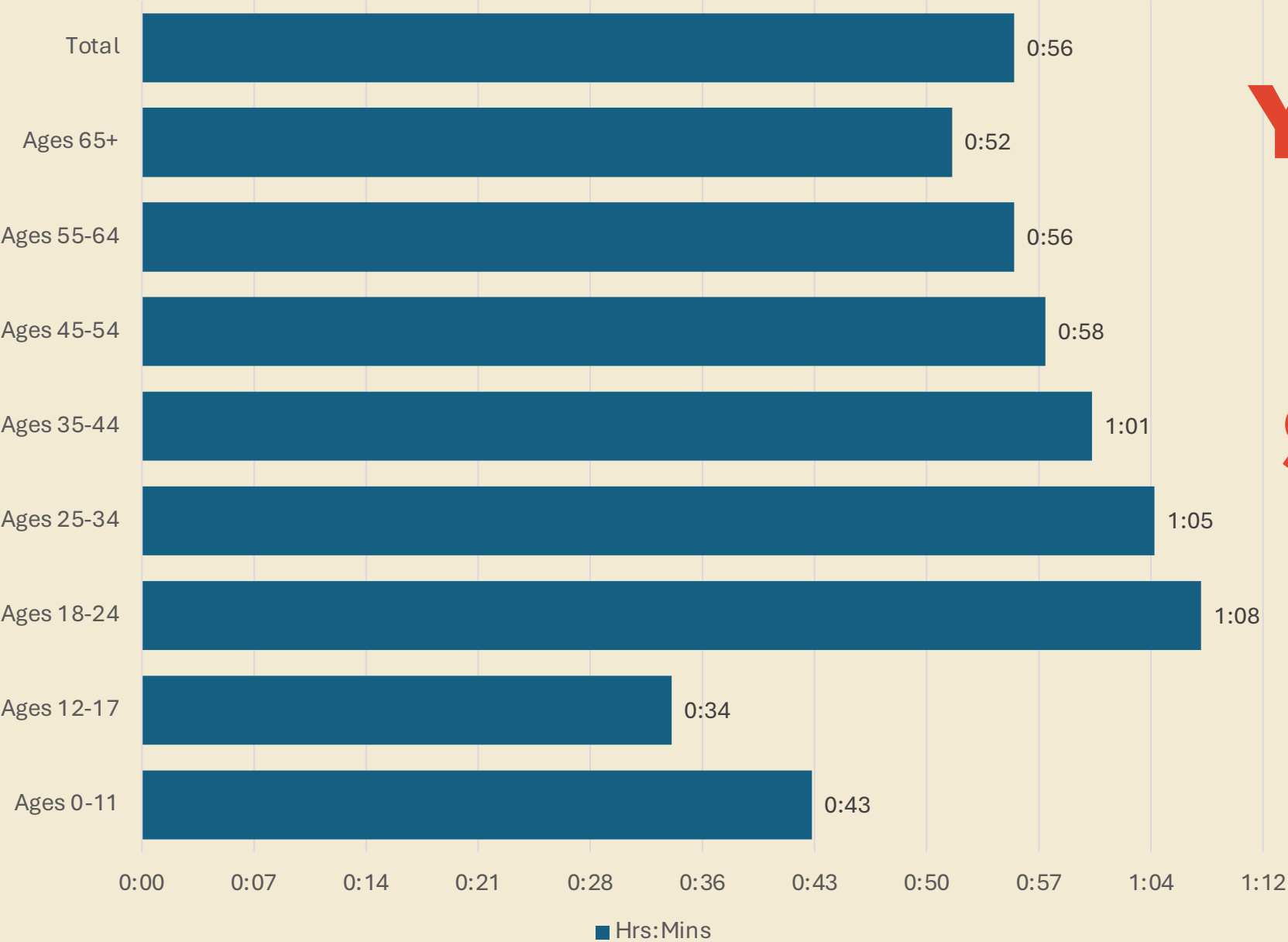




A FIVE-PART SERIES

CLICK TO PLAY! 

**YOUTUBE'S
GROWTH
AVG TIME
SPENT PER
DAY**



11:19

42



November 21, 2025

Styles Regalia — The Powv



Travel South Dakota Stories

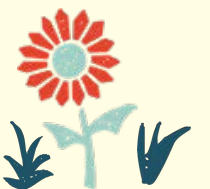
6+ YEARS

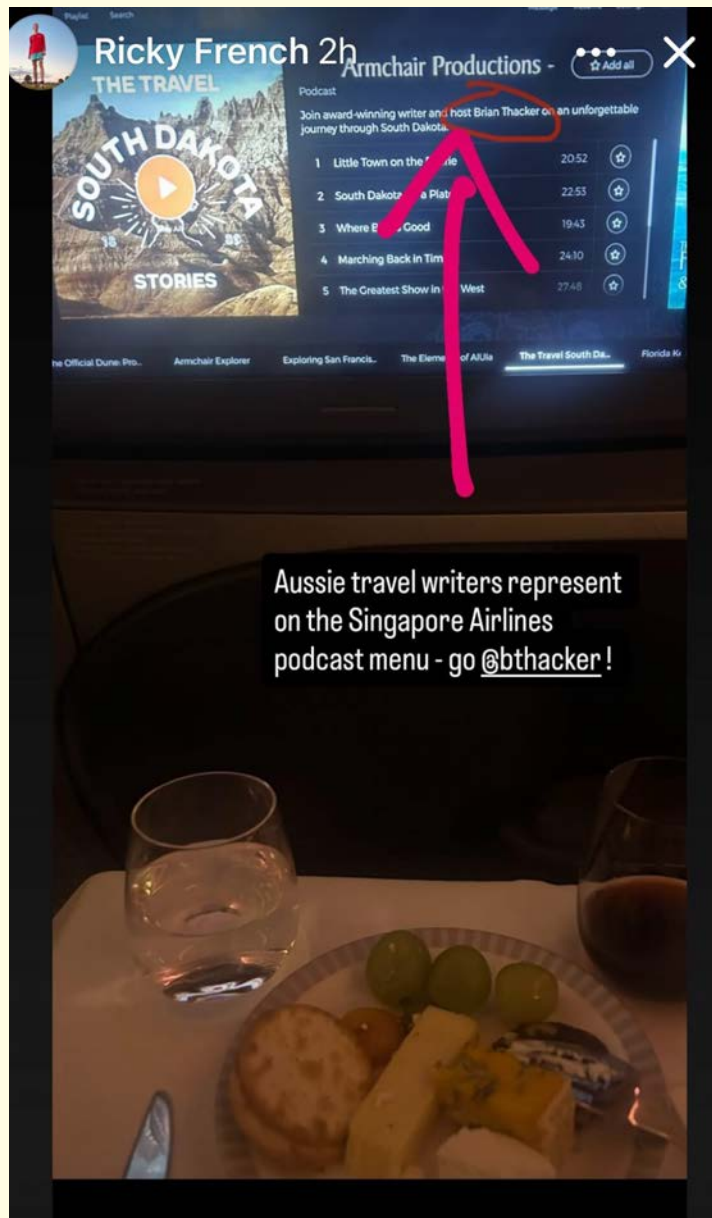
TOTAL EST. PODCAST ENGAGEMENT
TIME



124,848

TOTAL PODCAST DOWNLOADS





Aussie travel writers represent
on the Singapore Airlines
podcast menu - go [@bthacker](#) !



11:19

42



November 21, 2025

Styles Regalia — The Powv

...

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 Powv

...

Travel South Dakota Stories

FUTURE RELEASES

SERIES FOUR

Snow & Ice (Fall 2026)

State of Create (Fall 2026)

Quiet Places (Fall 2026)

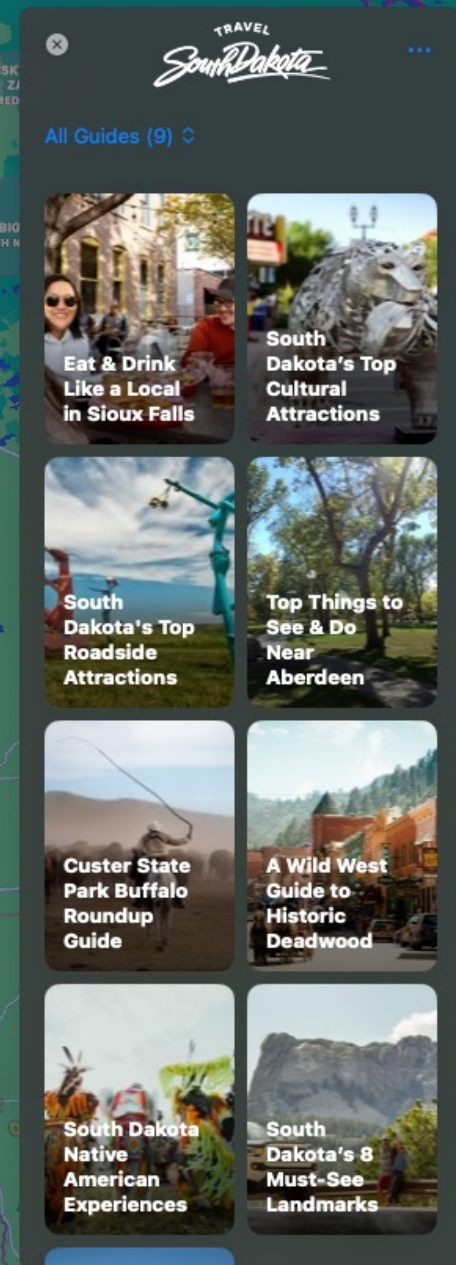
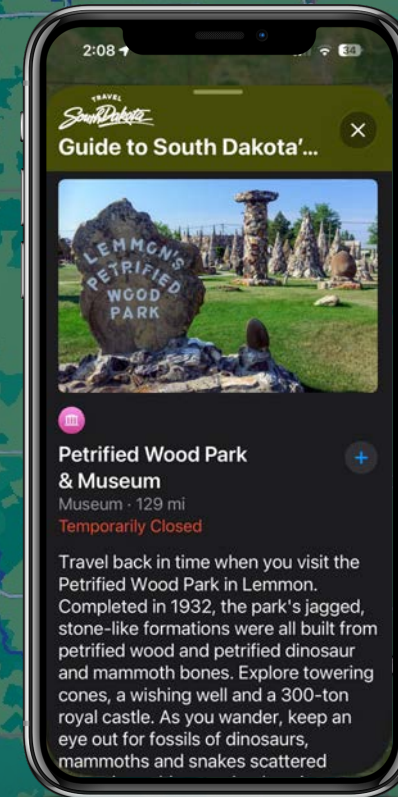
Kid's South Dakota (Spring 2027)

Starry Nights (Spring 2027)

Unique Lodgings (Spring 2027)

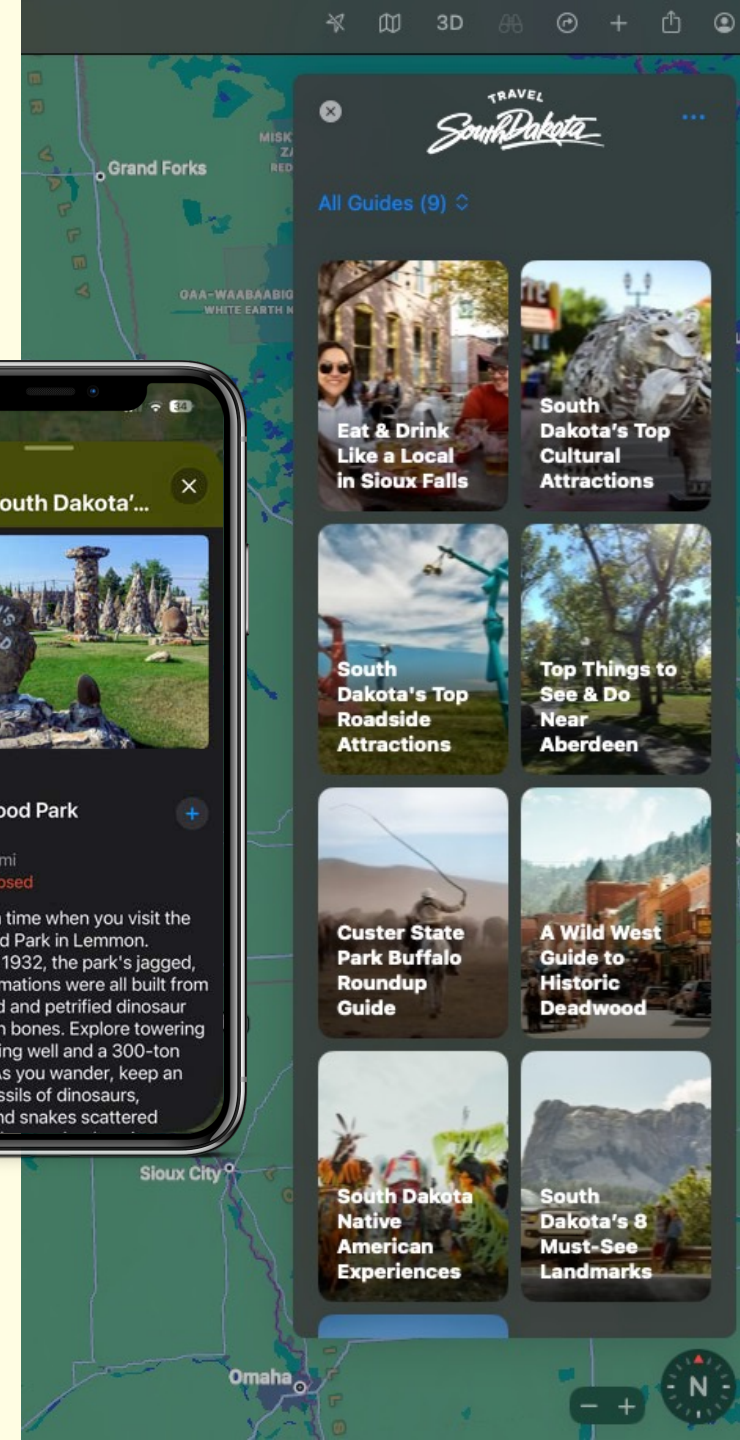
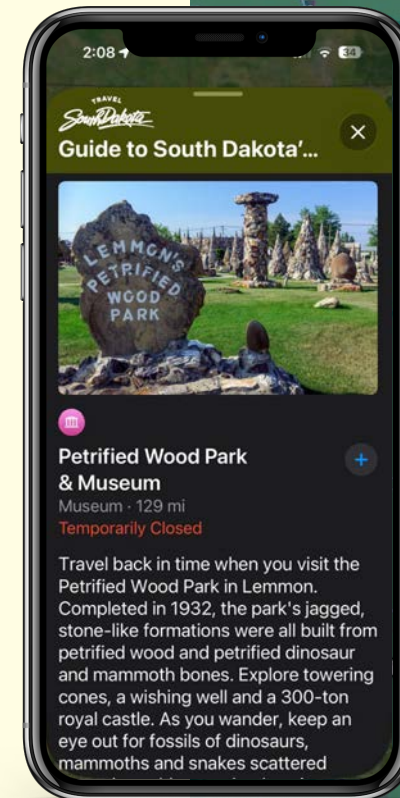
APPLE MAP GUIDES

- 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

208,000+ Unique Views Since Q2 2024



LEARNINGS

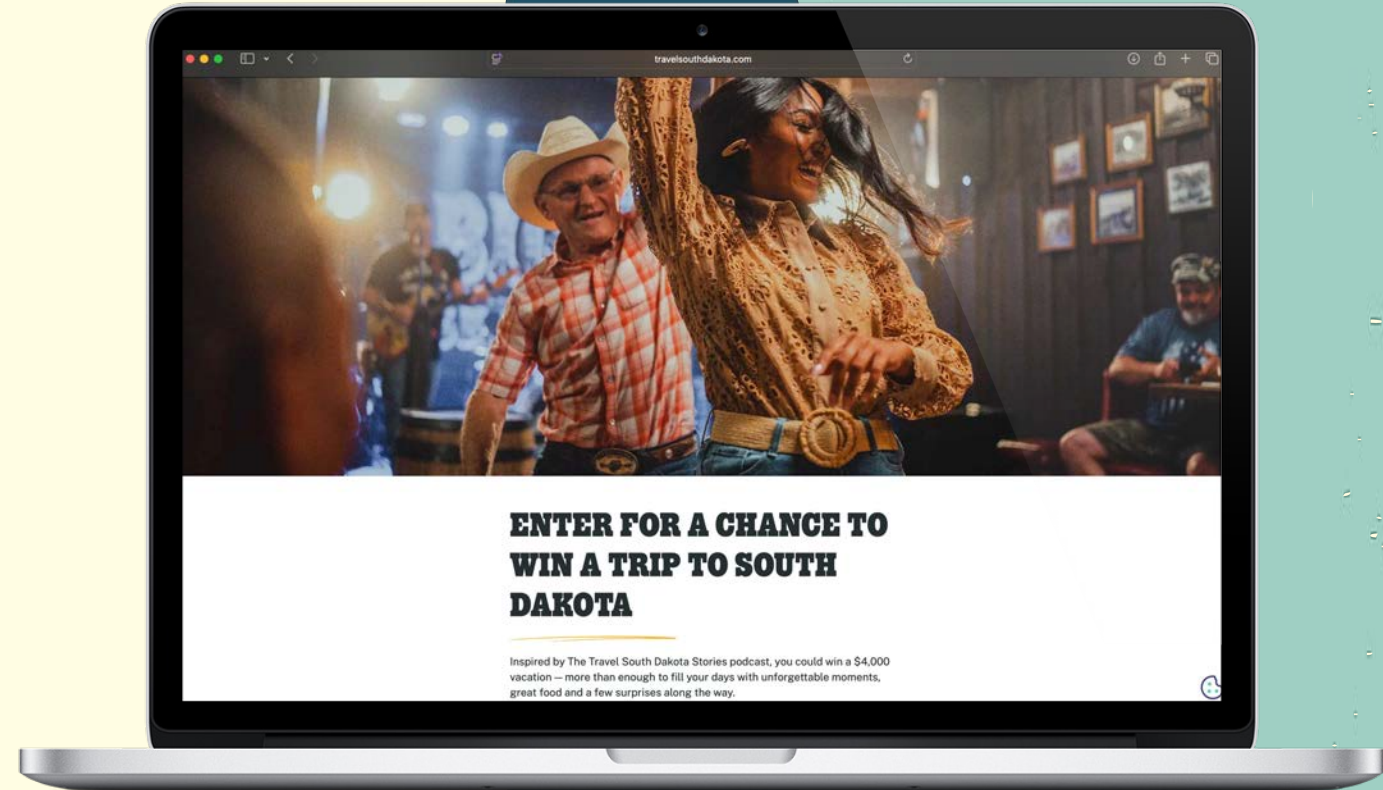
The addition of a giveaway was an effective means of extending a program's reach to consumers who might not ordinarily engage with branded content.

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)



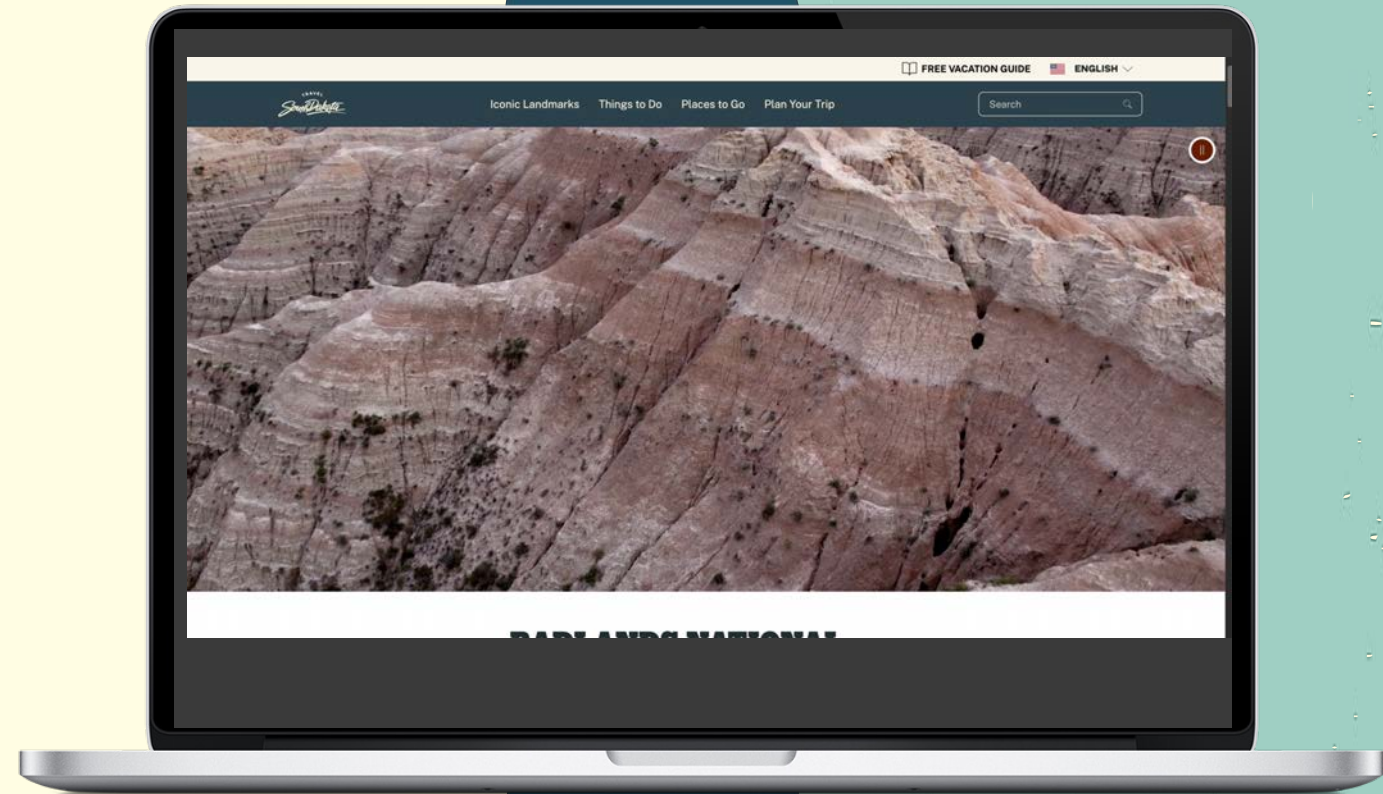


GOING FORWARD

Custom Landing Pages

Mindtrip AI Integration

SEO + GEO



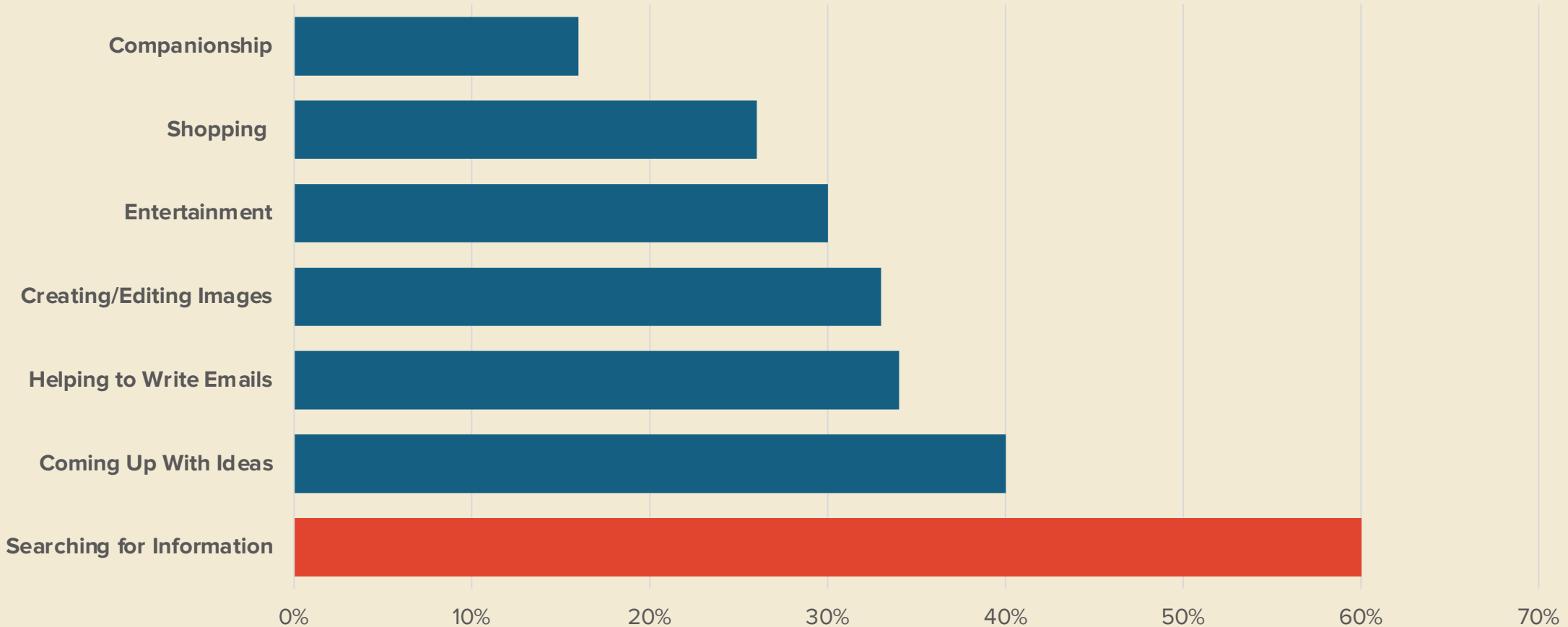
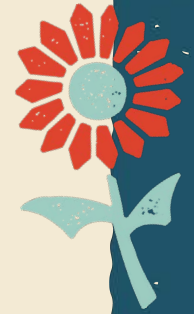
GEO > SEO

"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

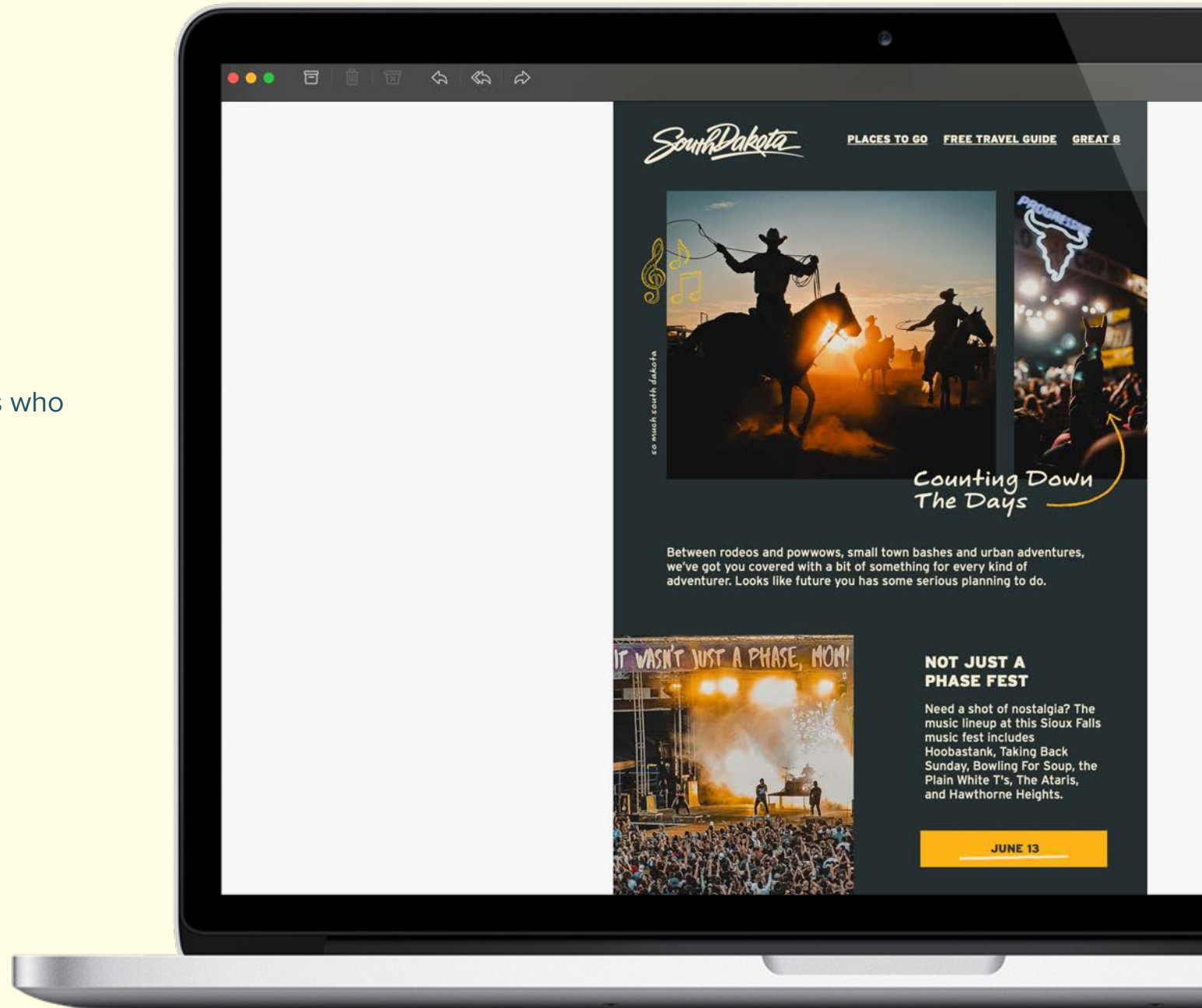


More Americans Report Using AI for Search Than for Any Other Purpose



EMAIL PROGRAM

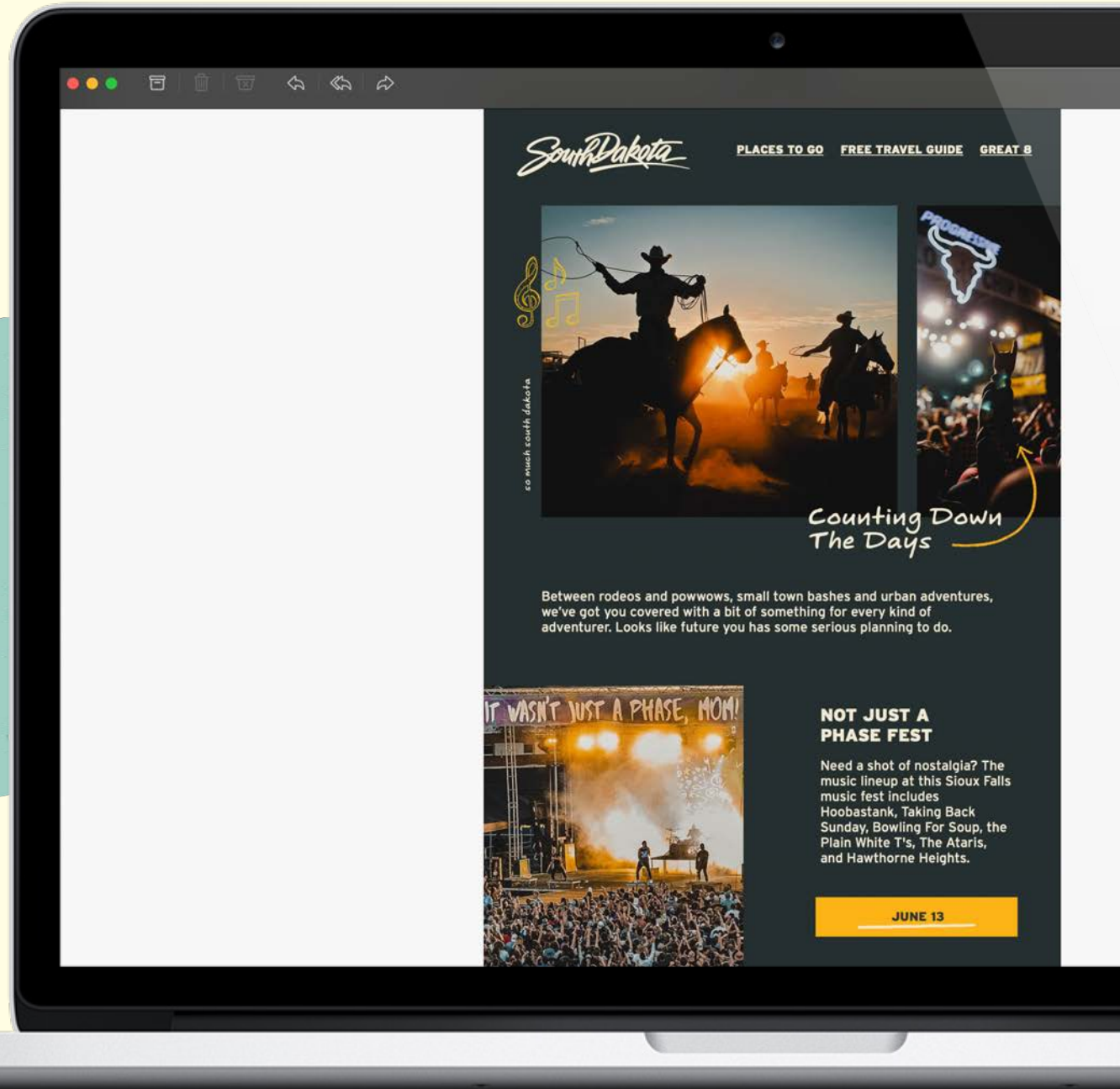
Email continues to serve as a key driver of intent — users who engage are not just browsing, they're actively planning.



EMAIL PROGRAM

20M+

TOTAL 2025 SENDS



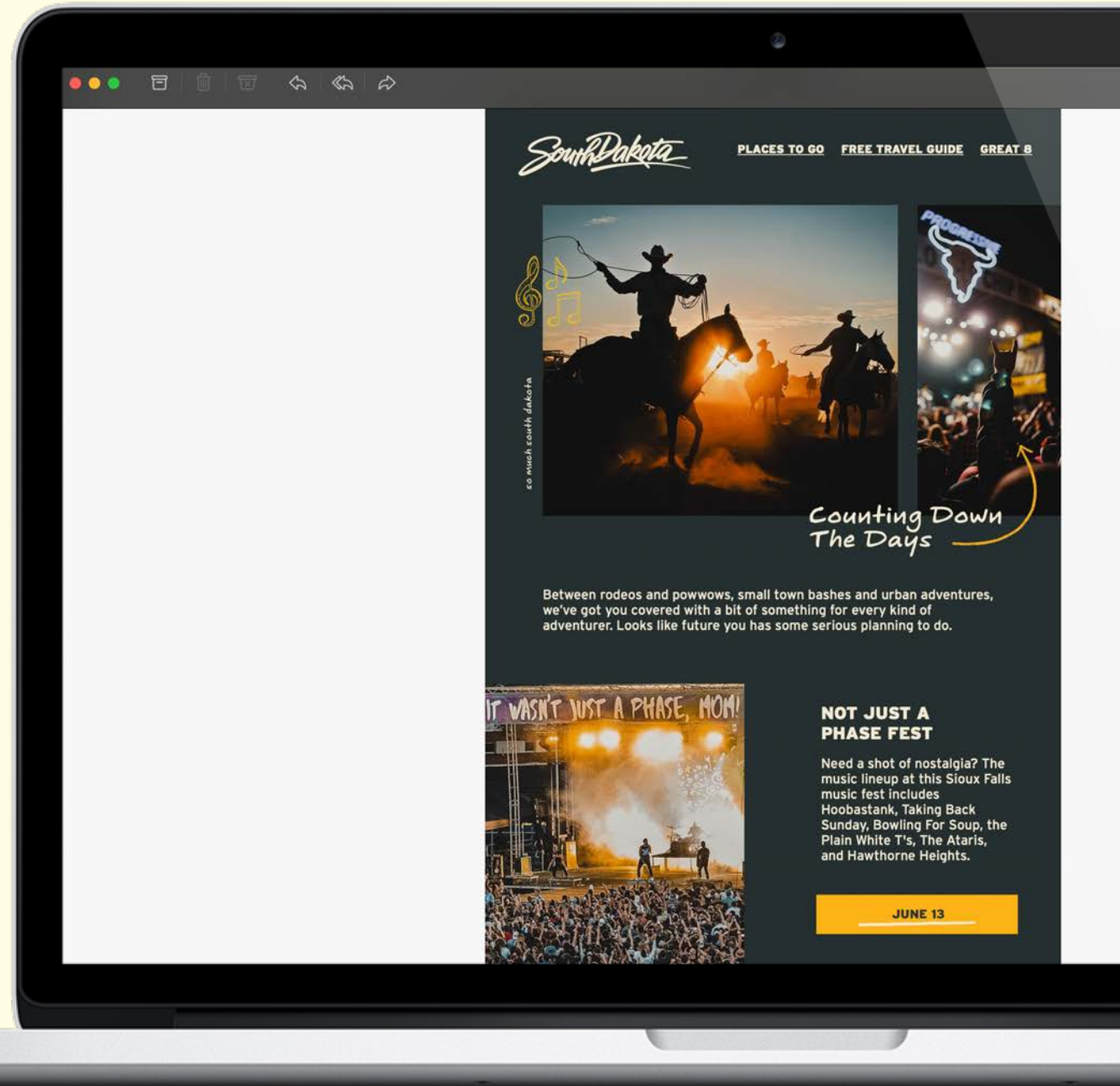
AUTOMATED JOURNEYS OVERVIEW

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



7:05

5G 100



South Dakota Stars & Stripes Passport - Celebrating 250 Years of America



FAQ



Dates

Celebrate America's 250th birthday with a journey through South Dakota's most iconic landmarks,...

[Show More >](#)

Places To Go (39)



Filter



Search



Map



Buffalo Roundup

157 mi



PASSPORT PROGRAM



55K+



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