



The Economic Impact of Tourism in South Dakota



County Analysis Calendar Year 2016



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Counties



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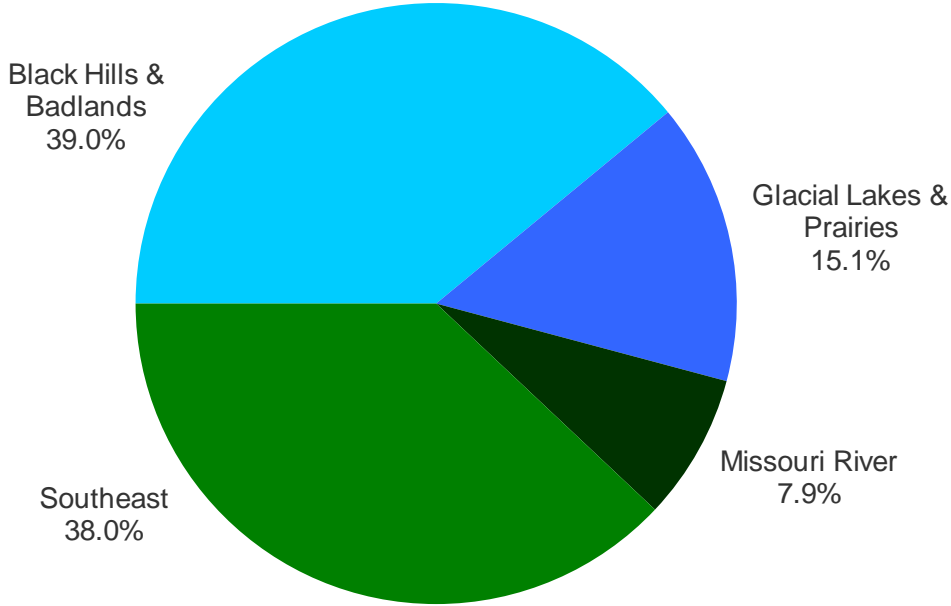
Regions

- The following tables present the county spending and impact information, broken out into the four tourism regions in South Dakota:
 - Black Hills & Badlands
 - Missouri River
 - Glacial Lakes & Prairies
 - Southeast
- Ranked by visitor spending, the Black Hills & Badlands and Southeast regions are the largest, together accounting for more than 75% of all spending in the state.
- Key counties include Minnehaha, Pennington, and Lawrence. They account for 58% of all spending in the state.

Regions

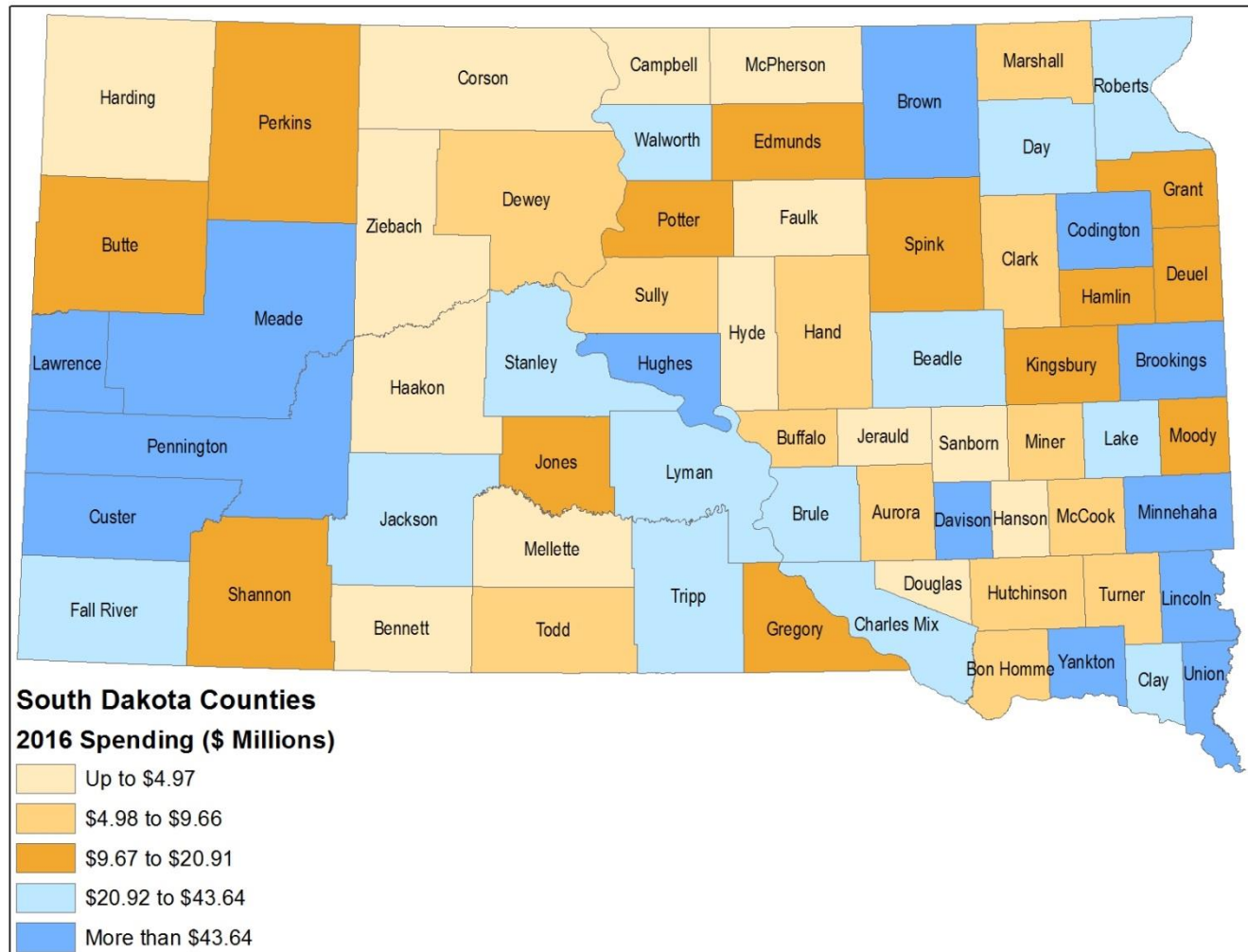
South Dakota Visitor Spending (by region)				
	2014	2015	2016	% Chnge
Black Hills & Badlands	\$1,458.29	\$1,498.96	\$1,496.57	-0.2%
Glacial Lakes & Prairies	\$607.02	\$582.93	\$580.78	-0.4%
Missouri River	\$315.65	\$310.69	\$301.78	-2.9%
Southeast	\$1,326.54	\$1,387.70	\$1,456.70	5.0%
Grand Total	\$3,707.51	\$3,780.28	\$3,835.83	1.5%

Tourism Industry Sales By Region
2016



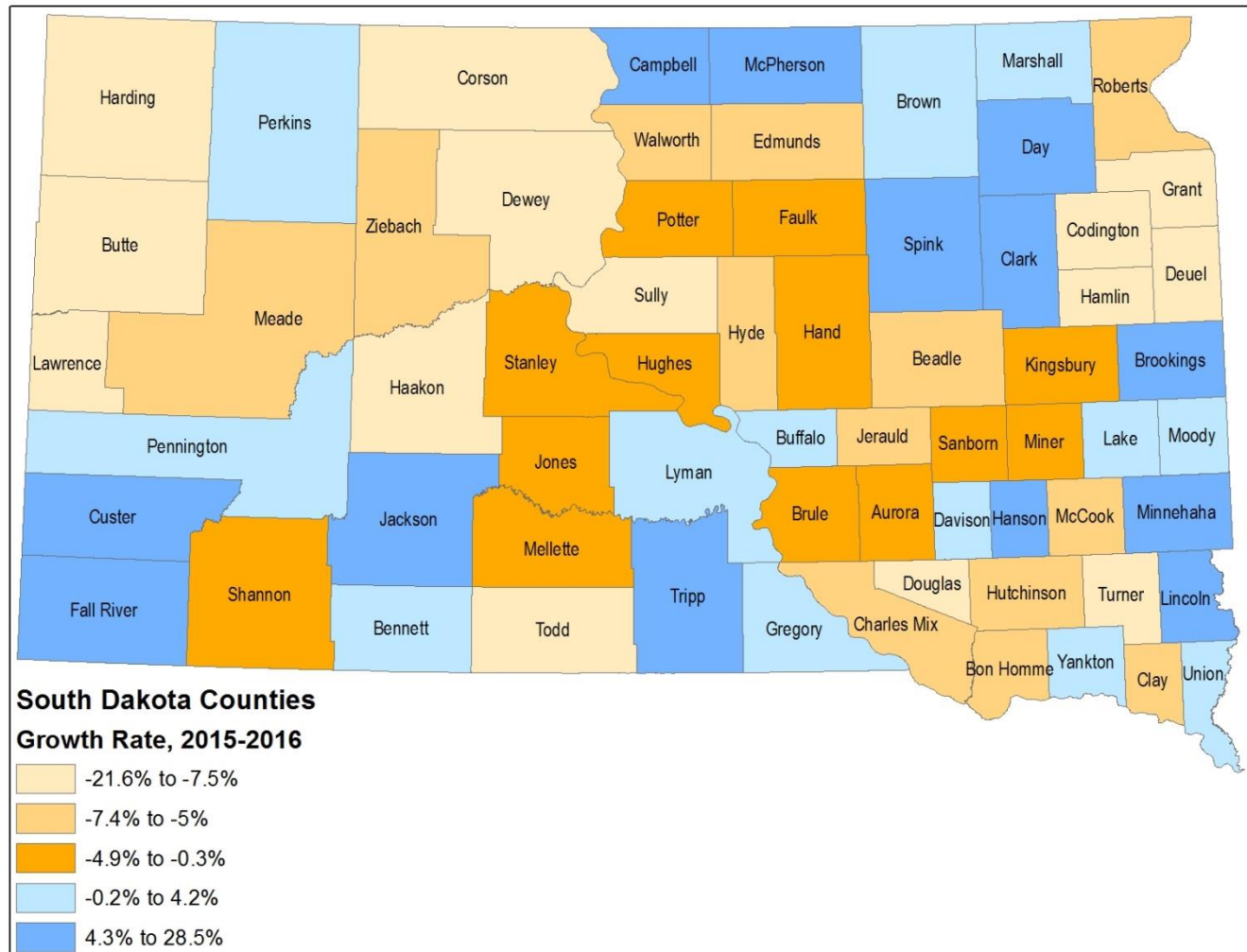
County spending

- Visitor spending is concentrated in the Sioux Falls and Black Hills areas of the state.



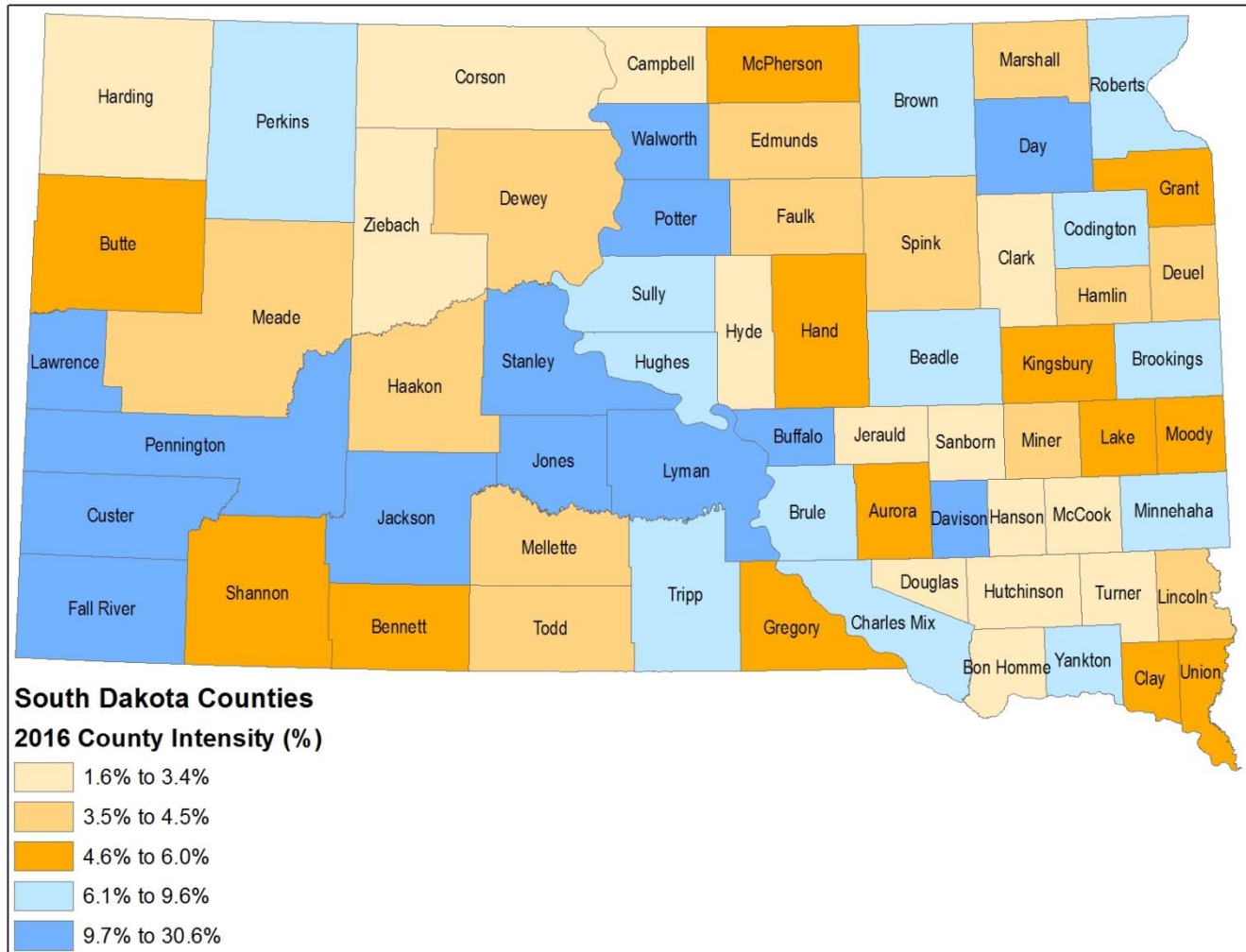
County visitor spending growth

- Visitor spending growth in 2016 was evident in the non-Pennington Black Hills counties as well as in the counties around Sioux Falls.



County tourism employment concentration

- Tourism employment is important for counties across the state – especially central and Black Hills counties.



Black Hills & Badlands

- Black Hills & Badlands is the largest region of the state, measured by visitor spending, with nearly 39% of all visitor sales.
- More than half of all lodging sales in the state occur in the Black Hills & Badlands.
- Growth in the region was in the southern counties – especially Fall River and Custer County.
- Much of the region's spending occurs in Lawrence and Pennington Counties with Pennington representing 20% of all visitor spending in the state.
- Nearly one-in-four jobs in Custer County are supported by tourism.

Black Hills & Badlands visitor spending timeline

Black Hills & Badlands Region								
County	(Millions)					Percent Change (2016/2015)	Share of Region	Share of State
	2012	2013	2014	2015	2016			
Bennett County	\$4.47	\$4.03	\$4.70	\$4.66	\$4.74	1.8%	0.32%	0.12%
Butte County	\$19.63	\$20.74	\$22.27	\$22.86	\$20.92	-8.5%	1.40%	0.55%
Custer County	\$86.87	\$86.90	\$94.91	\$101.87	\$109.33	7.3%	7.31%	2.85%
Fall River County	\$29.00	\$28.32	\$31.08	\$32.31	\$37.37	15.7%	2.50%	0.97%
Haakon County	\$5.21	\$4.92	\$5.38	\$5.48	\$4.98	-9.0%	0.33%	0.13%
Harding County	\$2.26	\$2.64	\$2.74	\$2.69	\$2.45	-8.8%	0.16%	0.06%
Jackson County	\$18.09	\$20.88	\$21.29	\$23.10	\$24.22	4.8%	1.62%	0.63%
Jones County	\$15.03	\$14.19	\$15.32	\$16.79	\$16.73	-0.3%	1.12%	0.44%
Lawrence County	\$413.77	\$429.20	\$465.56	\$475.78	\$438.41	-7.9%	29.29%	11.43%
Meade County	\$49.13	\$48.08	\$50.75	\$53.46	\$50.31	-5.9%	3.36%	1.31%
Mellette County	\$2.53	\$2.58	\$2.44	\$2.36	\$2.33	-1.5%	0.16%	0.06%
Oglala Lakota County	\$18.73	\$19.92	\$20.36	\$21.00	\$20.88	-0.6%	1.40%	0.54%
Pennington County	\$650.38	\$664.07	\$705.33	\$717.59	\$745.06	3.8%	49.78%	19.42%
Perkins County	\$7.37	\$7.50	\$7.94	\$11.83	\$12.32	4.2%	0.82%	0.32%
Todd County	\$75.53	\$35.17	\$8.23	\$7.19	\$6.52	-9.2%	0.44%	0.17%
Region Total	\$1,398.01	\$1,389.13	\$1,458.31	\$1,498.96	\$1,496.57	-0.2%	100%	39.02%
State Total	\$3,531.46	\$3,572.48	\$3,707.57	\$3,780.28	\$3,835.83	1.5%		100%

Black Hills & Badlands visitor spending, 2016

Black Hills & Badlands Region								
County	Visitor Spending - 2016 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Bennett County	\$0.75	\$1.12	\$0.65	\$1.14	\$1.06	\$4.74	1.8%	\$0.34
Butte County	\$3.71	\$4.94	\$2.07	\$3.38	\$6.81	\$20.92	-8.5%	\$1.50
Custer County	\$33.39	\$17.24	\$20.45	\$17.76	\$20.50	\$109.33	7.3%	\$8.51
Fall River County	\$8.08	\$8.57	\$5.75	\$6.90	\$8.07	\$37.37	15.7%	\$2.67
Haakon County	\$0.51	\$0.67	\$0.38	\$1.92	\$1.51	\$4.98	-9.0%	\$0.37
Harding County	\$0.46	\$0.66	\$0.22	\$0.37	\$0.74	\$2.45	-8.8%	\$0.20
Jackson County	\$5.99	\$3.03	\$3.93	\$5.06	\$6.21	\$24.22	4.8%	\$1.73
Jones County	\$3.65	\$3.16	\$2.35	\$2.87	\$4.69	\$16.73	-0.3%	\$1.18
Lawrence County	\$137.75	\$90.65	\$103.40	\$60.98	\$45.63	\$438.41	-7.9%	\$29.64
Meade County	\$10.01	\$13.97	\$5.45	\$8.78	\$12.11	\$50.31	-5.9%	\$5.53
Mellette County	\$0.32	\$0.42	\$0.23	\$0.34	\$1.01	\$2.33	-1.5%	\$0.17
Oglala Lakota County	\$4.83	\$5.78	\$1.69	\$2.55	\$6.03	\$20.88	-0.6%	\$1.16
Pennington County	\$164.77	\$176.04	\$118.44	\$149.35	\$136.46	\$745.06	3.8%	\$58.09
Perkins County	\$1.90	\$2.61	\$1.53	\$3.70	\$2.58	\$12.32	4.2%	\$0.83
Todd County	\$1.06	\$1.05	\$0.52	\$0.78	\$3.11	\$6.52	-9.2%	\$0.42
Region Total	\$377.17	\$329.91	\$267.07	\$265.90	\$256.53	\$1,496.57	2.6%	\$112.35
State Total	\$716.55	\$845.23	\$581.36	\$825.24	\$867.45	\$3,835.83	1.5%	\$278.77

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Black Hills & Badlands visitor spending, 2015

Black Hills & Badlands Region								
County	Visitor Spending - 2015 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Bennett County	\$0.72	\$1.11	\$0.61	\$1.10	\$1.11	\$4.66	-1.0%	\$0.32
Butte County	\$4.02	\$5.47	\$2.27	\$3.71	\$7.39	\$22.86	2.6%	\$1.60
Custer County	\$30.81	\$16.02	\$18.52	\$16.10	\$20.41	\$101.87	7.3%	\$7.56
Fall River County	\$6.99	\$7.19	\$4.78	\$5.76	\$7.59	\$32.31	4.0%	\$2.26
Haakon County	\$0.54	\$0.76	\$0.41	\$2.11	\$1.65	\$5.48	1.9%	\$0.39
Harding County	\$0.49	\$0.71	\$0.23	\$0.41	\$0.85	\$2.69	-2.0%	\$0.20
Jackson County	\$5.62	\$2.84	\$3.63	\$4.68	\$6.34	\$23.10	8.5%	\$1.52
Jones County	\$3.57	\$3.14	\$2.27	\$2.77	\$5.04	\$16.79	9.6%	\$1.10
Lawrence County	\$148.94	\$99.55	\$111.17	\$65.35	\$50.77	\$475.78	2.2%	\$29.97
Meade County	\$9.72	\$14.43	\$6.05	\$10.18	\$13.08	\$53.46	5.3%	\$6.33
Mellette County	\$0.31	\$0.38	\$0.23	\$0.34	\$1.10	\$2.36	-3.2%	\$0.16
Oglala Lakota County	\$4.73	\$5.72	\$1.63	\$2.46	\$6.47	\$21.00	3.2%	\$1.07
Pennington County	\$156.57	\$170.32	\$110.88	\$140.01	\$139.81	\$717.59	1.7%	\$55.10
Perkins County	\$1.83	\$2.60	\$1.45	\$3.53	\$2.43	\$11.83	48.9%	\$0.84
Todd County	\$1.19	\$1.12	\$0.60	\$0.91	\$3.36	\$7.19	-12.7%	\$0.45
Region Total	\$376.04	\$331.36	\$264.72	\$259.42	\$267.41	\$1,498.96	2.8%	\$108.86
State Total	\$700.73	\$832.27	\$559.82	\$791.90	\$895.56	\$3,780.28	2.0%	\$270.39

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Black Hills & Badlands economic impacts

Black Hills & Badlands Region							
County	Employment		Share of Region	Share of State	Share of County	Labor Income, (Millions)	
	Direct	Total				Direct	Total
Bennett County	57	77	0.4%	0.1%	5.4%	\$0.72	\$1.28
Butte County	226	289	1.6%	0.5%	5.3%	\$4.14	\$6.43
Custer County	643	1,023	5.5%	1.9%	23.1%	\$17.64	\$30.37
Fall River County	416	543	2.9%	1.0%	13.0%	\$7.47	\$11.36
Haakon County	39	61	0.3%	0.1%	3.8%	\$0.64	\$1.50
Harding County	23	32	0.2%	0.1%	2.8%	\$0.52	\$0.81
Jackson County	146	222	1.2%	0.4%	15.8%	\$2.32	\$3.98
Jones County	122	163	0.9%	0.3%	19.1%	\$2.08	\$3.35
Lawrence County	3,943	5,230	28.1%	9.8%	30.6%	\$98.02	\$142.42
Meade County	361	529	2.8%	1.0%	4.3%	\$7.68	\$13.42
Mellette County	22	33	0.2%	0.1%	4.2%	\$0.29	\$0.52
Oglala Lakota County	145	220	1.2%	0.4%	4.5%	\$2.64	\$6.63
Pennington County	6,878	9,862	53.0%	18.5%	12.7%	\$151.04	\$280.25
Perkins County	117	174	0.9%	0.3%	8.1%	\$1.56	\$3.35
Todd County	114	150	0.8%	0.3%	4.3%	\$2.11	\$3.34
Region Total	13,195	18,609		34.9%		\$298.85	\$509.01
State Total	37,091	53,258			8.9%	\$774.52	\$1,471.69

Glacial Lakes & Prairies

- \$580 million - 15% of the visitor spending in South Dakota occurs in the Glacial Lakes & Prairies region.
- Compared to the state, visitors spend a higher share of their dollar on recreational activities in the Glacial Lakes & Prairies region – nearly 25%.
- More than \$41.5 million in state and local tax revenue is collected in this region.
- Visitor spending in Brookings County neared \$100 million in 2016.
- Nearly 6,000 jobs are directly supported by visitor spending in the region.

Glacial Lakes & Prairies spending timeline

Glacial Lakes & Prairies Region								
County	(Millions)					Percent Change (2016/2015)	Share of Region	Share of State
	2012	2013	2014	2015	2016			
Beadle County	\$54.52	\$52.57	\$52.09	\$46.47	\$43.66	-6.1%	7.52%	1.14%
Brookings County	\$86.52	\$88.02	\$91.60	\$89.61	\$99.64	11.2%	17.16%	2.60%
Brown County	\$205.58	\$212.06	\$192.27	\$177.40	\$179.66	1.3%	30.93%	4.68%
Clark County	\$5.00	\$4.60	\$4.66	\$4.56	\$5.10	11.8%	0.88%	0.13%
Codington County	\$103.24	\$95.47	\$98.28	\$97.13	\$89.88	-7.5%	15.48%	2.34%
Day County	\$13.35	\$14.35	\$15.08	\$17.73	\$21.12	19.1%	3.64%	0.55%
Deuel County	\$8.97	\$10.37	\$11.59	\$10.78	\$9.78	-9.3%	1.68%	0.25%
Edmunds County	\$10.76	\$11.17	\$11.52	\$11.17	\$10.40	-6.8%	1.79%	0.27%
Faulk County	\$5.84	\$5.51	\$5.61	\$5.07	\$4.98	-1.8%	0.86%	0.13%
Grant County	\$15.46	\$19.94	\$22.38	\$23.09	\$20.19	-12.6%	3.48%	0.53%
Hamlin County	\$11.15	\$11.53	\$12.39	\$14.13	\$11.08	-21.6%	1.91%	0.29%
Hand County	\$6.12	\$5.85	\$6.14	\$6.21	\$5.96	-4.0%	1.03%	0.16%
Jerauld County	\$3.67	\$3.40	\$3.41	\$3.11	\$2.89	-7.1%	0.50%	0.08%
Kingsbury County	\$9.15	\$9.63	\$10.11	\$10.22	\$9.84	-3.7%	1.69%	0.26%
McPherson County	\$4.61	\$4.38	\$4.55	\$4.23	\$4.59	8.6%	0.79%	0.12%
Marshall County	\$8.77	\$8.72	\$7.56	\$7.45	\$7.74	4.0%	1.33%	0.20%
Moody County	\$13.16	\$10.84	\$11.82	\$10.80	\$11.01	2.0%	1.90%	0.29%
Roberts County	\$28.95	\$29.15	\$29.25	\$28.67	\$27.25	-5.0%	4.69%	0.71%
Sanborn County	\$2.52	\$2.76	\$3.01	\$2.65	\$2.60	-1.6%	0.45%	0.07%
Spink County	\$13.66	\$12.75	\$13.73	\$12.45	\$13.40	7.7%	2.31%	0.35%
Region Total	\$611.02	\$613.05	\$607.03	\$582.93	\$580.78	-0.4%	100%	15.14%
State Total	\$3,531.46	\$3,572.48	\$3,707.57	\$3,780.28	\$3,835.83	1.5%		100%

Glacial Lakes & Prairies spending, 2016

Glacial Lakes & Prairies Region								
County	Visitor Spending - 2016 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Beadle County	\$5.68	\$8.36	\$6.19	\$9.50	\$13.93	\$43.66	-6.1%	\$3.30
Brookings County	\$16.17	\$27.86	\$11.67	\$17.58	\$26.36	\$99.64	11.2%	\$7.22
Brown County	\$27.02	\$32.89	\$20.71	\$62.28	\$36.76	\$179.66	1.3%	\$12.20
Clark County	\$0.44	\$0.84	\$0.42	\$1.57	\$1.84	\$5.10	11.8%	\$0.44
Codington County	\$15.22	\$20.31	\$11.82	\$17.26	\$25.28	\$89.88	-7.5%	\$6.46
Day County	\$4.37	\$5.59	\$2.20	\$4.92	\$4.04	\$21.12	19.1%	\$1.45
Deuel County	\$1.63	\$1.71	\$0.89	\$2.41	\$3.14	\$9.78	-9.3%	\$0.74
Edmunds County	\$1.00	\$1.29	\$0.46	\$1.87	\$5.79	\$10.40	-6.8%	\$0.72
Faulk County	\$0.81	\$0.99	\$0.43	\$0.62	\$2.13	\$4.98	-1.8%	\$0.30
Grant County	\$1.79	\$3.36	\$1.55	\$9.57	\$3.93	\$20.19	-12.6%	\$1.41
Hamlin County	\$1.31	\$1.81	\$0.48	\$3.13	\$4.34	\$11.08	-21.6%	\$0.76
Hand County	\$0.81	\$1.43	\$0.78	\$1.56	\$1.37	\$5.96	-4.0%	\$0.54
Jerauld County	\$0.35	\$0.53	\$0.40	\$0.71	\$0.91	\$2.89	-7.1%	\$0.29
Kingsbury County	\$1.65	\$2.27	\$1.28	\$2.05	\$2.59	\$9.84	-3.7%	\$0.81
McPherson County	\$0.52	\$0.78	\$0.30	\$1.40	\$1.59	\$4.59	8.6%	\$0.45
Marshall County	\$1.69	\$2.56	\$0.46	\$0.94	\$2.09	\$7.74	4.0%	\$0.55
Moody County	\$4.42	\$1.68	\$0.56	\$0.84	\$3.51	\$11.01	2.0%	\$0.88
Roberts County	\$5.41	\$6.13	\$1.27	\$5.49	\$8.94	\$27.25	-5.0%	\$1.72
Sanborn County	\$0.29	\$0.58	\$0.11	\$0.64	\$0.99	\$2.60	-1.6%	\$0.24
Spink County	\$1.85	\$2.63	\$1.08	\$3.05	\$4.79	\$13.40	7.7%	\$1.04
Region Total	\$92.43	\$123.59	\$63.06	\$147.38	\$154.32	\$580.78		\$41.52
State Total	\$716.55	\$845.23	\$581.36	\$825.24	\$867.45	\$3,835.83	1.5%	\$278.77

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Glacial Lakes & Prairies spending, 2015

Glacial Lakes & Prairies Region								
County	Visitor Spending - 2015 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Beadle County	\$5.98	\$8.97	\$6.52	\$10.06	\$14.93	\$46.47	-10.8%	\$3.44
Brookings County	\$13.96	\$24.19	\$9.81	\$14.83	\$26.82	\$89.61	-2.2%	\$6.66
Brown County	\$26.32	\$32.66	\$19.94	\$60.59	\$37.90	\$177.40	-7.7%	\$11.88
Clark County	\$0.39	\$0.73	\$0.35	\$1.31	\$1.77	\$4.56	-2.1%	\$0.40
Codington County	\$16.01	\$22.77	\$12.70	\$18.62	\$27.02	\$97.13	-1.2%	\$6.86
Day County	\$3.73	\$4.81	\$1.68	\$3.80	\$3.72	\$17.73	17.6%	\$1.20
Deuel County	\$1.74	\$1.92	\$0.97	\$2.65	\$3.49	\$10.78	-7.0%	\$0.75
Edmunds County	\$1.02	\$1.46	\$0.47	\$1.94	\$6.28	\$11.17	-3.1%	\$0.74
Faulk County	\$0.78	\$1.07	\$0.41	\$0.59	\$2.22	\$5.07	-9.6%	\$0.32
Grant County	\$1.99	\$3.82	\$1.72	\$10.73	\$4.83	\$23.09	3.2%	\$1.55
Hamlin County	\$1.35	\$1.98	\$0.62	\$4.04	\$6.14	\$14.13	14.1%	\$0.87
Hand County	\$0.86	\$1.49	\$0.78	\$1.54	\$1.54	\$6.21	1.2%	\$0.58
Jerauld County	\$0.35	\$0.60	\$0.41	\$0.74	\$1.02	\$3.11	-8.6%	\$0.28
Kingsbury County	\$1.69	\$2.32	\$1.31	\$2.10	\$2.80	\$10.22	1.1%	\$0.81
McPherson County	\$0.49	\$0.70	\$0.26	\$1.20	\$1.58	\$4.23	-6.9%	\$0.40
Marshall County	\$1.61	\$2.44	\$0.40	\$0.83	\$2.16	\$7.45	-1.5%	\$0.52
Moody County	\$4.33	\$1.60	\$0.52	\$0.78	\$3.57	\$10.80	-8.6%	\$0.84
Roberts County	\$5.58	\$6.37	\$1.32	\$5.73	\$9.68	\$28.67	-2.0%	\$1.74
Sanborn County	\$0.27	\$0.59	\$0.11	\$0.67	\$1.02	\$2.65	-12.0%	\$0.23
Spink County	\$1.67	\$2.43	\$0.92	\$2.63	\$4.80	\$12.45	-9.4%	\$0.96
Region Total	\$90.11	\$122.93	\$61.23	\$145.38	\$163.28	\$582.93		\$41.01
State Total	\$700.73	\$832.27	\$559.82	\$791.90	\$895.56	\$3,780.28	2.0%	\$270.39

Glacial Lakes & Prairies economic impacts

Glacial Lakes & Prairies Region							
County	Employment		Share of Region	Share of State	Share of County	Labor Income, (Millions)	
	Direct	Total				Direct	Total
Beadle County	511	754	8.1%	1.4%	6.4%	\$9.79	\$19.69
Brookings County	1,410	1,955	21.1%	3.7%	8.1%	\$25.28	\$44.01
Brown County	1,938	2,710	29.3%	5.1%	9.5%	\$39.20	\$72.36
Clark County	28	44	0.5%	0.1%	1.9%	\$0.51	\$1.11
Codington County	998	1,457	15.8%	2.7%	6.9%	\$18.70	\$36.24
Day County	312	407	4.4%	0.8%	11.7%	\$4.45	\$7.40
Deuel County	71	100	1.1%	0.2%	3.3%	\$1.21	\$2.66
Edmunds County	62	97	1.0%	0.2%	3.6%	\$1.56	\$3.18
Faulk County	40	59	0.6%	0.1%	4.0%	\$0.54	\$1.30
Grant County	192	293	3.2%	0.5%	4.9%	\$3.23	\$7.34
Hamlin County	73	112	1.2%	0.2%	4.0%	\$1.80	\$3.42
Hand County	88	130	1.4%	0.2%	5.3%	\$1.17	\$2.66
Jerauld County	20	34	0.4%	0.1%	1.4%	\$0.41	\$0.87
Kingsbury County	121	173	1.9%	0.3%	5.7%	\$1.74	\$3.71
McPherson County	42	65	0.7%	0.1%	4.7%	\$0.72	\$1.48
Marshall County	80	104	1.1%	0.2%	3.8%	\$1.24	\$2.04
Moody County	106	156	1.7%	0.3%	4.6%	\$1.62	\$3.68
Roberts County	287	377	4.1%	0.7%	7.0%	\$3.79	\$6.73
Sanborn County	21	39	0.4%	0.1%	2.9%	\$0.37	\$1.02
Spink County	122	183	2.0%	0.3%	4.6%	\$2.24	\$4.73
Region Total	6,012	9,250		17.4%		\$119.58	\$225.63
State Total	37,091	53,258			9.1%	\$774.52	\$1,471.69

Missouri River

- More than \$300 million – 7.9% of the visitor spending in South Dakota - occurs in the Missouri River region.
- Visitors to the region spent \$66.2 million at lodging establishments in 2016.
- The two largest counties are Hughes and Lyman County.
- 4,350 jobs are supported by tourism activity in the region.
- Tourism's employment concentration is highest in Lyman and Potter – and higher than that of the state.
 - 1-in-4 jobs in Lyman County is supported by visitor spending.

Missouri River visitor spending timeline

Missouri River Region								
County	(Millions)					Percent Change (2016/2015)	Share of Region	Share of State
	2012	2013	2014	2015	2016			
Aurora County	\$6.21	\$5.88	\$5.85	\$5.93	\$5.83	-1.8%	1.93%	0.15%
Brule County	\$28.08	\$25.81	\$26.43	\$27.78	\$27.48	-1.1%	9.11%	0.72%
Buffalo County	\$5.06	\$5.79	\$6.03	\$5.63	\$5.71	1.4%	1.89%	0.15%
Campbell County	\$2.40	\$2.29	\$2.80	\$2.80	\$2.95	5.4%	0.98%	0.08%
Charles Mix County	\$28.51	\$30.60	\$27.37	\$26.64	\$24.87	-6.7%	8.24%	0.65%
Corson County	\$2.64	\$2.82	\$2.94	\$2.76	\$2.47	-10.4%	0.82%	0.06%
Dewey County	\$8.57	\$10.32	\$11.28	\$10.43	\$9.48	-9.2%	3.14%	0.25%
Gregory County	\$10.94	\$10.96	\$11.36	\$11.41	\$11.50	0.8%	3.81%	0.30%
Hughes County	\$82.04	\$83.72	\$87.17	\$80.30	\$76.68	-4.5%	25.41%	2.00%
Hyde County	\$1.66	\$1.65	\$1.99	\$1.93	\$1.83	-5.2%	0.61%	0.05%
Lyman County	\$20.68	\$31.58	\$36.48	\$37.86	\$39.04	3.1%	12.94%	1.02%
Potter County	\$19.40	\$18.61	\$18.50	\$16.70	\$16.23	-2.8%	5.38%	0.42%
Stanley County	\$20.11	\$18.48	\$20.20	\$21.71	\$21.44	-1.3%	7.11%	0.56%
Sully County	\$7.93	\$7.91	\$8.75	\$8.88	\$7.12	-19.7%	2.36%	0.19%
Tripp County	\$21.12	\$19.97	\$20.58	\$21.25	\$22.44	5.6%	7.43%	0.58%
Walworth County	\$26.23	\$26.37	\$27.24	\$27.98	\$26.05	-6.9%	8.63%	0.68%
Ziebach County	\$0.66	\$0.76	\$0.70	\$0.71	\$0.66	-6.7%	0.22%	0.02%
Region Total	\$292.23	\$303.53	\$315.65	\$310.69	\$301.78	-2.9%	100%	7.87%
State Total	\$3,531.46	\$3,572.48	\$3,707.57	\$3,780.28	\$3,835.83	1.5%		100%

Missouri River visitor spending, 2016

Missouri River Region								
County	Visitor Spending - 2016 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Aurora County	\$0.52	\$0.79	\$0.51	\$0.41	\$3.60	\$5.83	-1.8%	\$0.50
Brule County	\$4.79	\$7.19	\$3.30	\$6.46	\$5.74	\$27.48	-1.1%	\$2.00
Buffalo County	\$2.39	\$0.85	\$0.61	\$0.92	\$0.94	\$5.71	1.4%	\$0.36
Campbell County	\$0.66	\$0.96	\$0.05	\$0.63	\$0.65	\$2.95	5.4%	\$0.22
Charles Mix County	\$7.69	\$3.86	\$3.34	\$3.87	\$6.11	\$24.87	-6.7%	\$1.61
Corson County	\$0.21	\$0.72	\$0.05	\$0.20	\$1.28	\$2.47	-10.4%	\$0.18
Dewey County	\$1.09	\$1.67	\$0.81	\$2.06	\$3.85	\$9.48	-9.2%	\$0.57
Gregory County	\$1.69	\$2.89	\$2.37	\$1.78	\$2.77	\$11.50	0.8%	\$0.95
Hughes County	\$15.60	\$17.67	\$12.03	\$15.14	\$16.24	\$76.68	-4.5%	\$6.13
Hyde County	\$0.23	\$0.21	\$0.24	\$0.76	\$0.39	\$1.83	-5.2%	\$0.20
Lyman County	\$9.82	\$4.42	\$6.75	\$9.02	\$9.03	\$39.04	3.1%	\$2.75
Potter County	\$5.45	\$2.22	\$1.37	\$3.31	\$3.88	\$16.23	-2.8%	\$1.16
Stanley County	\$5.00	\$4.95	\$3.30	\$4.32	\$3.87	\$21.44	-1.3%	\$1.51
Sully County	\$0.39	\$1.92	\$3.73	\$0.50	\$0.58	\$7.12	-19.7%	\$0.56
Tripp County	\$3.52	\$4.55	\$2.44	\$7.53	\$4.39	\$22.44	5.6%	\$1.58
Walworth County	\$7.09	\$5.64	\$2.44	\$5.03	\$5.85	\$26.05	-6.9%	\$1.78
Ziebach County	\$0.07	\$0.30	\$0.01	\$0.13	\$0.13	\$0.66	-6.7%	\$0.07
Region Total	\$66.22	\$60.81	\$43.36	\$62.10	\$69.29	\$301.78		\$22.12
State Total	\$716.55	\$845.23	\$581.36	\$825.24	\$867.45	\$3,835.83	1.5%	\$278.77

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Missouri River visitor spending, 2015

Missouri River Region								
County	Visitor Spending - 2015 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Aurora County	\$0.51	\$0.85	\$0.50	\$0.41	\$3.67	\$5.93	1.5%	\$0.48
Brule County	\$4.77	\$7.19	\$3.24	\$6.38	\$6.20	\$27.78	5.1%	\$1.92
Buffalo County	\$2.34	\$0.83	\$0.59	\$0.89	\$0.98	\$5.63	-6.7%	\$0.33
Campbell County	\$0.64	\$0.87	\$0.04	\$0.58	\$0.66	\$2.80	0.0%	\$0.21
Charles Mix County	\$7.81	\$4.18	\$3.66	\$4.23	\$6.75	\$26.64	-2.7%	\$1.64
Corson County	\$0.22	\$0.82	\$0.06	\$0.22	\$1.43	\$2.76	-6.3%	\$0.19
Dewey County	\$1.21	\$1.73	\$0.91	\$2.30	\$4.28	\$10.43	-7.5%	\$0.60
Gregory County	\$1.68	\$2.84	\$2.32	\$1.77	\$2.81	\$11.41	0.4%	\$0.90
Hughes County	\$16.29	\$18.53	\$12.28	\$15.55	\$17.65	\$80.30	-7.9%	\$6.29
Hyde County	\$0.24	\$0.23	\$0.25	\$0.81	\$0.40	\$1.93	-2.8%	\$0.21
Lyman County	\$9.37	\$4.23	\$6.51	\$8.49	\$9.26	\$37.86	3.8%	\$2.50
Potter County	\$5.59	\$2.28	\$1.40	\$3.40	\$4.03	\$16.70	-9.7%	\$1.04
Stanley County	\$5.01	\$5.05	\$3.26	\$4.27	\$4.12	\$21.71	7.5%	\$1.43
Sully County	\$0.39	\$2.40	\$4.65	\$0.60	\$0.83	\$8.88	1.4%	\$0.60
Tripp County	\$3.31	\$4.20	\$2.24	\$6.99	\$4.51	\$21.25	3.3%	\$1.45
Walworth County	\$7.30	\$6.11	\$2.57	\$5.34	\$6.66	\$27.98	2.7%	\$1.83
Ziebach County	\$0.07	\$0.33	\$0.01	\$0.15	\$0.14	\$0.71	0.3%	\$0.07
Region Total	\$66.73	\$62.68	\$44.51	\$62.40	\$74.38	\$310.69		\$21.69
State Total	\$700.73	\$832.27	\$559.82	\$791.90	\$895.56	\$3,780.28	2.0%	\$270.39

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Missouri River economic impacts

Missouri River Region							
County	Employment		Share of Region	Share of State	Share of County	Labor Income, (Millions)	
	Direct	Total				Direct	Total
Aurora County	42	80	1.9%	0.2%	4.7%	\$0.84	\$2.31
Brule County	253	336	7.7%	0.6%	9.6%	\$4.52	\$7.24
Buffalo County	66	87	2.0%	0.2%	12.4%	\$1.27	\$2.09
Campbell County	16	24	0.5%	0.0%	2.6%	\$0.29	\$0.58
Charles Mix County	291	410	9.4%	0.8%	7.3%	\$4.66	\$8.56
Corson County	16	25	0.6%	0.0%	1.7%	\$0.28	\$0.68
Dewey County	63	113	2.6%	0.2%	3.7%	\$1.35	\$3.04
Gregory County	129	174	4.0%	0.3%	6.0%	\$1.88	\$3.36
Hughes County	937	1,312	30.2%	2.5%	9.2%	\$18.83	\$34.81
Hyde County	17	31	0.7%	0.1%	3.3%	\$0.36	\$1.05
Lyman County	387	584	13.4%	1.1%	24.2%	\$8.11	\$13.43
Potter County	132	222	5.1%	0.4%	13.0%	\$2.54	\$5.72
Stanley County	174	226	5.2%	0.4%	10.7%	\$2.88	\$4.40
Sully County	66	82	1.9%	0.2%	7.3%	\$1.95	\$2.53
Tripp County	193	280	6.4%	0.5%	7.3%	\$3.89	\$7.10
Walworth County	238	350	8.1%	0.7%	10.2%	\$4.65	\$8.67
Ziebach County	8	12	0.3%	0.0%	1.7%	\$0.13	\$0.29
Region Total	2,986	4,345		8.2%		\$58.44	\$105.87
State Total	37,091	53,258			8.9%	\$774.52	\$1,471.69

Southeast

- The Southeast region, measured by visitor spending, ranks 2nd among the four regions of the state.
- More than \$1.4 billion - 38% of the visitor spending in South Dakota - occurs in the Southeast region.
- The region has the highest visitor spending growth of all regions in 2016.
- 72% of the region's spending is spent in Minnehaha County; Minnehaha County captures 27% of all visitor spending state-wide.
- Lincoln County is the fastest growing county in the state in 2016 after ranking 2nd highest in 2015.
- With higher wages paid in the region, 43% of the state's tourism-generated labor income goes to employees in the Southeast region.

Southeast spending timeline

Southeast Region								
County	(Millions)					Percent Change (2016/2015)	Share of Region	Share of State
	2012	2013	2014	2015	2016			
Bon Homme County	\$5.68	\$5.47	\$6.12	\$5.84	\$5.47	-6.3%	0.38%	0.14%
Clay County	\$25.63	\$25.40	\$27.39	\$28.23	\$26.38	-6.5%	1.81%	0.69%
Davison County	\$105.04	\$100.55	\$107.45	\$105.01	\$106.34	1.3%	7.30%	2.77%
Douglas County	\$3.42	\$3.38	\$3.38	\$3.46	\$3.00	-13.5%	0.21%	0.08%
Hanson County	\$2.13	\$2.36	\$2.81	\$2.82	\$3.03	7.5%	0.21%	0.08%
Hutchinson County	\$9.72	\$8.98	\$9.37	\$9.37	\$8.80	-6.2%	0.60%	0.23%
Lake County	\$25.96	\$25.24	\$25.31	\$23.96	\$24.25	1.2%	1.66%	0.63%
Lincoln County	\$38.86	\$42.71	\$51.25	\$68.21	\$87.62	28.5%	6.02%	2.28%
McCook County	\$10.14	\$9.67	\$10.33	\$10.26	\$9.66	-5.8%	0.66%	0.25%
Miner County	\$4.71	\$4.43	\$4.67	\$5.29	\$5.03	-4.8%	0.35%	0.13%
Minnehaha County	\$886.25	\$926.42	\$955.44	\$998.93	\$1,050.11	5.1%	72.09%	27.38%
Turner County	\$6.10	\$6.88	\$7.55	\$7.26	\$6.60	-9.1%	0.45%	0.17%
Union County	\$41.92	\$42.27	\$47.33	\$48.53	\$49.97	3.0%	3.43%	1.30%
Yankton County	\$64.62	\$63.01	\$68.20	\$70.52	\$70.42	-0.1%	4.83%	1.84%
Region Total	\$1,230.20	\$1,266.77	\$1,326.57	\$1,387.70	\$1,456.70	5.0%	100%	37.98%
State Total	\$3,531.46	\$3,572.48	\$3,707.57	\$3,780.28	\$3,835.83	1.5%		100%

Southeast visitor spending, 2016

Southeast Region								
County	Visitor Spending - 2016 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Bon Homme County	\$0.54	\$1.89	\$0.42	\$0.42	\$2.20	\$5.47	-6.3%	\$0.48
Clay County	\$3.41	\$7.76	\$2.13	\$3.24	\$9.84	\$26.38	-6.5%	\$1.96
Davison County	\$19.20	\$23.82	\$17.33	\$21.95	\$24.05	\$106.34	1.3%	\$7.51
Douglas County	\$0.23	\$0.58	\$0.12	\$0.78	\$1.28	\$3.00	-13.5%	\$0.29
Hanson County	\$0.55	\$0.65	\$0.34	\$0.55	\$0.94	\$3.03	7.5%	\$0.32
Hutchinson County	\$0.88	\$1.57	\$0.74	\$2.00	\$3.61	\$8.80	-6.2%	\$0.76
Lake County	\$2.78	\$7.48	\$4.01	\$4.34	\$5.64	\$24.25	1.2%	\$1.73
Lincoln County	\$8.50	\$21.17	\$19.20	\$13.18	\$25.57	\$87.62	28.5%	\$7.27
McCook County	\$1.31	\$1.62	\$0.88	\$3.38	\$2.47	\$9.66	-5.8%	\$0.72
Miner County	\$0.86	\$1.02	\$0.53	\$1.53	\$1.09	\$5.03	-4.8%	\$0.41
Minnehaha County	\$126.76	\$229.88	\$139.63	\$272.38	\$281.47	\$1,050.11	5.1%	\$71.94
Turner County	\$0.68	\$1.16	\$0.68	\$1.40	\$2.68	\$6.60	-9.1%	\$0.68
Union County	\$5.92	\$11.63	\$12.00	\$8.90	\$11.53	\$49.97	3.0%	\$4.14
Yankton County	\$9.12	\$20.68	\$9.88	\$15.82	\$14.93	\$70.42	-0.1%	\$4.57
Region Total	\$180.72	\$330.92	\$207.87	\$349.87	\$387.31	\$1,456.70		\$102.78
State Total	\$716.55	\$845.23	\$581.36	\$825.24	\$867.45	\$3,835.83	1.5%	\$278.77

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Southeast visitor spending, 2015

Southeast Region								
County	Visitor Spending - 2015 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Retail	Recreation	Transport**	Total		
Bon Homme County	\$0.54	\$2.09	\$0.42	\$0.42	\$2.37	\$5.84	-4.6%	\$0.50
Clay County	\$3.58	\$8.36	\$2.22	\$3.38	\$10.69	\$28.23	3.1%	\$2.07
Davison County	\$18.52	\$23.64	\$16.64	\$21.09	\$25.12	\$105.01	-2.3%	\$7.32
Douglas County	\$0.25	\$0.74	\$0.14	\$0.91	\$1.42	\$3.46	2.4%	\$0.32
Hanson County	\$0.50	\$0.58	\$0.30	\$0.49	\$0.95	\$2.82	0.5%	\$0.29
Hutchinson County	\$0.91	\$1.72	\$0.77	\$2.09	\$3.88	\$9.37	0.1%	\$0.80
Lake County	\$2.72	\$7.31	\$3.77	\$4.22	\$5.94	\$23.96	-5.3%	\$1.71
Lincoln County	\$5.83	\$15.77	\$13.84	\$9.28	\$23.49	\$68.21	33.1%	\$6.47
McCook County	\$1.36	\$1.62	\$0.89	\$3.41	\$2.98	\$10.26	-0.7%	\$0.72
Miner County	\$0.87	\$1.11	\$0.50	\$1.57	\$1.24	\$5.29	13.3%	\$0.40
Minnehaha County	\$117.52	\$218.99	\$128.24	\$252.59	\$281.59	\$998.93	4.6%	\$68.69
Turner County	\$0.71	\$1.26	\$0.72	\$1.51	\$3.07	\$7.26	-3.8%	\$0.71
Union County	\$5.60	\$11.26	\$11.23	\$8.34	\$12.10	\$48.53	2.5%	\$4.22
Yankton County	\$8.92	\$20.86	\$9.66	\$15.41	\$15.67	\$70.52	3.4%	\$4.60
Region Total	\$167.84	\$315.30	\$189.35	\$324.71	\$390.50	\$1,387.70		\$98.83
State Total	\$700.73	\$832.27	\$559.82	\$791.90	\$895.56	\$3,780.28	2.0%	\$270.39

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Southeast economic impacts

Southeast Region							
County	Employment		Share of Region	Share of State	Share of County	Labor Income, (Millions)	
	Direct	Total				Direct	Total
Bon Homme County	66	101	0.5%	0.2%	2.9%	\$1.03	\$2.23
Clay County	352	528	2.5%	1.0%	5.9%	\$5.41	\$10.67
Davison County	1,196	1,658	7.9%	3.1%	10.1%	\$21.97	\$40.29
Douglas County	19	37	0.2%	0.1%	1.7%	\$0.24	\$1.00
Hanson County	29	48	0.2%	0.1%	3.1%	\$0.56	\$1.42
Hutchinson County	71	118	0.6%	0.2%	2.5%	\$1.06	\$2.88
Lake County	324	419	2.0%	0.8%	5.4%	\$4.90	\$8.91
Lincoln County	533	1,045	5.0%	2.0%	3.5%	\$10.29	\$37.38
McCook County	69	103	0.5%	0.2%	3.4%	\$0.98	\$2.27
Miner County	48	71	0.3%	0.1%	4.4%	\$0.64	\$1.51
Minnehaha County	10,184	14,813	70.4%	27.8%	9.4%	\$225.99	\$462.75
Turner County	64	124	0.6%	0.2%	2.9%	\$0.88	\$3.19
Union County	507	784	3.7%	1.5%	6.0%	\$9.50	\$27.20
Yankton County	827	1,205	5.7%	2.3%	7.2%	\$14.21	\$29.49
Region Total	14,222	21,054		39.5%		\$297.65	\$631.19
State Total	37,091	53,258			8.9%	\$774.52	\$1,471.69

Methodology and Background



TOURISM
ECONOMICS

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Definitions and terms

- A visitor includes all overnight and day visitors - traveling outside of their usual environment, defined as beyond 50 miles
- The analysis measures the economic impact of visitors to the State of South Dakota, including:
 - Day trips and overnight visitors
 - Domestic, Canadian and overseas visitors
 - Resident and non-resident travel

Quantifying the travel and tourism economy

- Most economic sectors such as financial services, insurance, or construction are easily defined within a country's national accounts statistics.
- Travel is not so easily measured because it is not a single industry. It is a demand-side activity which affects multiple sectors to various degrees.
- Travel spans nearly a dozen sectors including lodging, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, travel agents, and recreation (including museums, theme parks, sports events and others).

Methods and data sources

- Domestic visitor expenditure estimates are provided by DK Shifflet's representative survey of US travelers. These are broken out by sectors (lodging, transport at destination, food & beverage, retail, and recreation), by purpose (business and leisure), and by length of stay (day and overnight).
- Tourism Economics (TE) then adds and cross-checks several categories of spending:
 - International visitor spending (source: NTTO, TE)
 - Canada visitor spending (source: Statistics Canada, TE)
 - Spending on air travel which accrues to South Dakota airports and locally-based airlines
 - Gasoline purchases by visitors (source: TE calculation)
 - Recreational second home expenditures (source: US Census)
 - Smith Travel Research (lodging performance)
 - Local level lodging tax data
 - Sales tax by industry (South Dakota Department of Revenue)
 - Industry-by-industry employment and personal income (Bureau of Economic Analysis and Bureau of Labor Statistics)

Methods and data sources

- An IMPLAN model was utilized for the State of South Dakota. This traces the flow of visitor-related expenditures through the local economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of travel.
- Tourism Economics then cross-checks these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.
- The source of the employment and wage data is the Regional Economic Information System (REIS), Bureau of Economic Analysis, U.S. Department of Commerce. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data. The main definitional difference is that sole-proprietors, which do not require unemployment insurance, are not counted in the ES202 data.

Description of spending categories

Spend Category	Description
Lodging	Includes visitor spending in accommodation sector. This includes food and other services provided by hotels and similar establishments.
Recreation	Includes visitor spending within the arts, entertainment and recreation supersector.
Air transport	Includes the local economic activity generated by visitors within the air transport (airline) and support services (on airport) sectors.
Other transport	Includes all forms of local transport services such as taxis, limos, trains, rental cars, and buses.
Shopping	Includes visitor spending within all retail sectors within the South Dakota economy.
Service stations	visitor spending on gasoline. Only the margin counts as local economic impact.
Second homes	Spending associated with the operation of seasonal second homes for recreational use as defined by the Census Department. This is based on an “imputed rent” calculation over an estimated peak season.
Food and beverage	Includes all visitor spending at restaurants and bars.

Cross section of our clients

Corporations

Hotel companies
Aviation manufacturing
Internet marketing
Internet distribution
Financial institutions
Theme Parks
Travel trade

Associations

Caribbean Tourism Org.
European Travel Commission
Pacific Asia Travel Assoc.
US Travel Association
DMAI
IAAPA
WTTC
UN World Tourism Org.

Destinations

Tourism Australia
Bahamas Ministry of Tourism
Brand USA
Visit California
Canadian Tourism Commission
Dubai Tourism
Georgia Tourism
Saudi Arabia (SCT)
Discover Los Angeles
NYC & Company
Ontario Ministry of Tourism
Visit Orlando
Philadelphia Tourism Marketing
San Diego CVB
Tourism Ireland
Visit Britain
Visit Denmark
Visit Florida
Visit Switzerland



About Tourism Economics

- Tourism Economics, headquartered in Philadelphia, is an Oxford Economics company dedicated to providing high value, robust, and relevant analyses of the tourism sector that reflects the dynamics of local and global economies. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, project feasibility analysis, tourism forecasting models, tourism policy analysis, and economic impact studies.
- Our staff have worked with over 200 destinations to quantify the economic value of tourism, forecast demand, guide strategy, or evaluate tourism policies.
- Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics is founded on a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of 80 highly-experienced professional economists; a dedicated data analysis team; global modeling tools; close links with Oxford University, and a range of partner institutions in Europe, the US and in the United Nations Project Link.
- For more information: info@tourismeconomics.com.



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