



# The Economic Impact of Tourism in South Dakota



## County and Region Analysis Calendar Year 2015



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# Regions

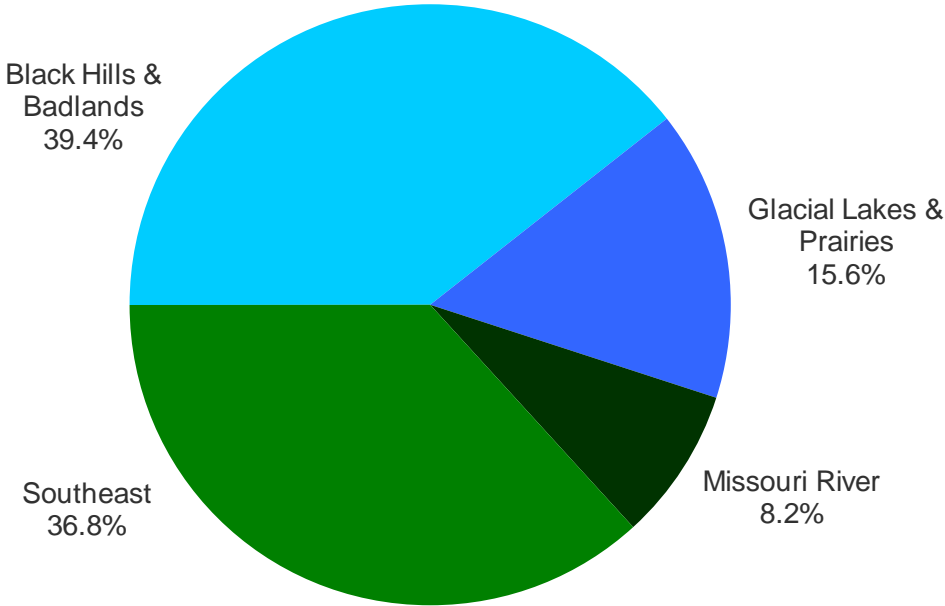
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- The following tables present the county spending and impact information, broken out into the four tourism regions in South Dakota:
  - Black Hills & Badlands
  - Missouri River
  - Glacial Lakes & Prairies
  - Southeast
- Ranked by visitor spending, the Black Hills & Badlands and Southeast regions are the largest, together accounting for 75% of all spending in the state.
- Key counties include Minnehaha, Pennington, and Lawrence. They account for 57% of all spending in the state.

# Regions

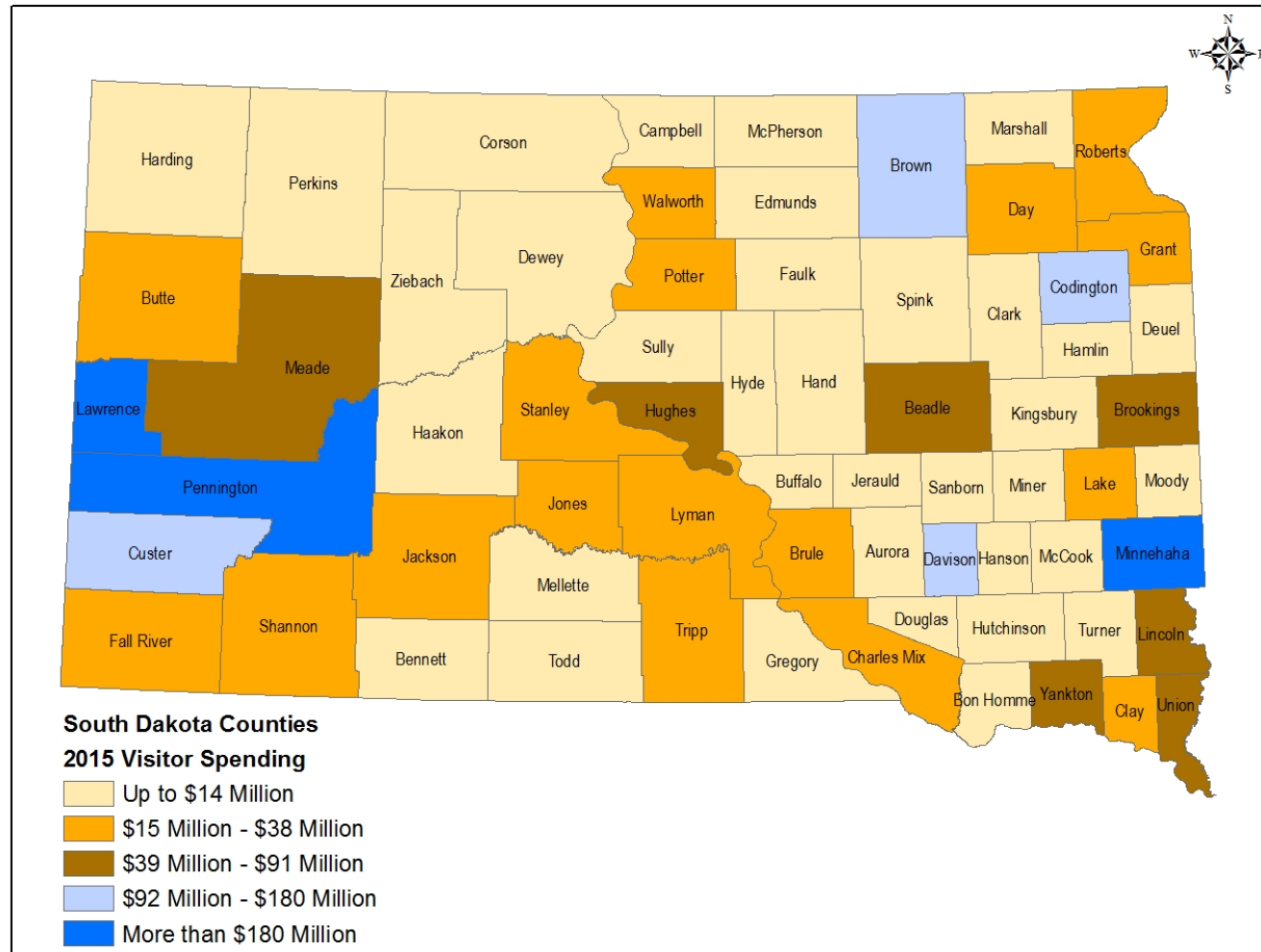
South Dakota Visitor Spending (by region)			
	2014	2015	% Chnge
<b>Black Hills &amp; Badlands</b>	\$1,458.29	\$1,488.95	2.1%
<b>Glacial Lakes &amp; Prairies</b>	\$607.02	\$590.55	-2.7%
<b>Missouri River</b>	\$315.65	\$310.99	-1.5%
<b>Southeast</b>	\$1,326.54	\$1,390.19	4.8%
<b>Grand Total</b>	\$3,707.51	\$3,780.68	2.0%

## Tourism Industry Sales By Region 2015



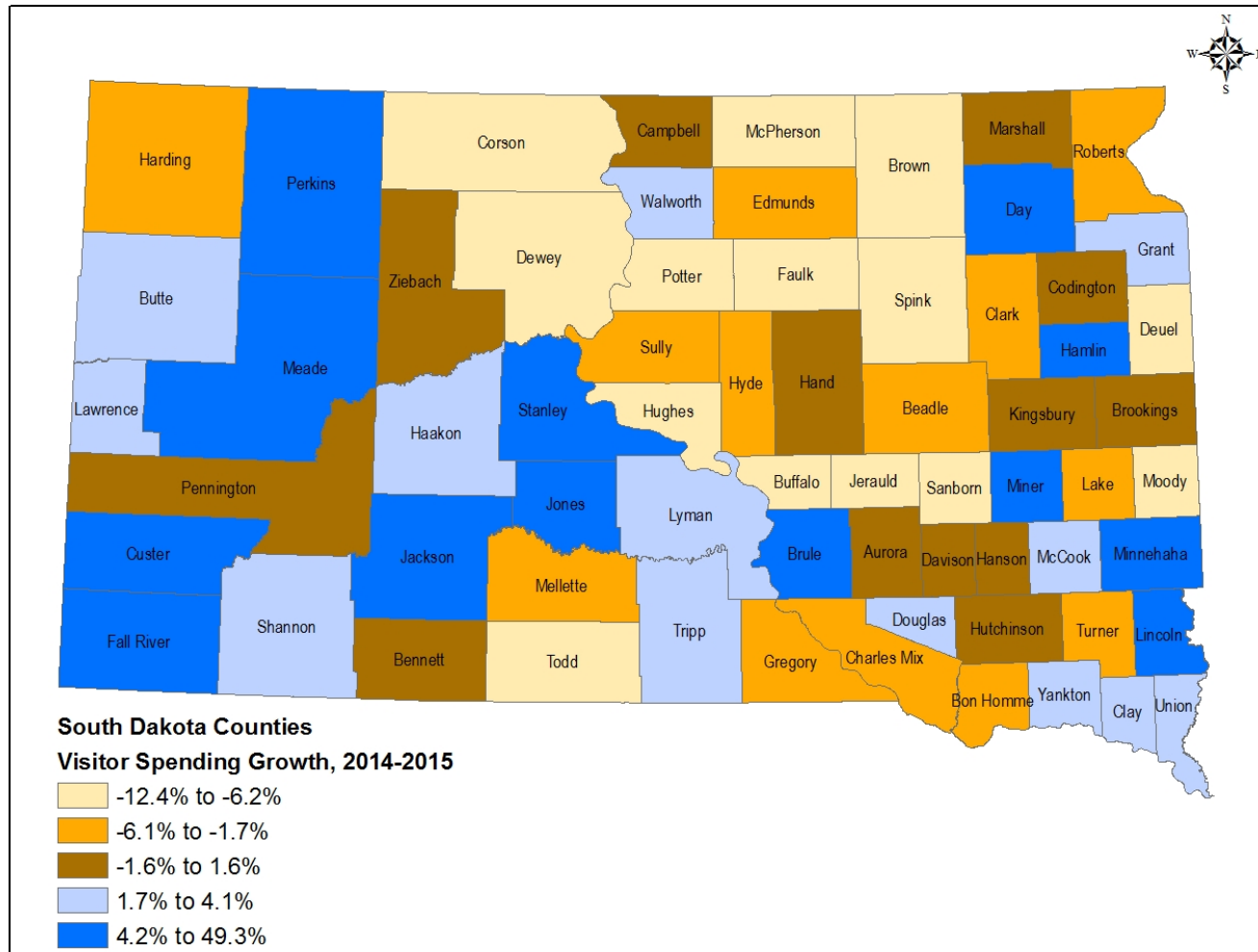
# County spending

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



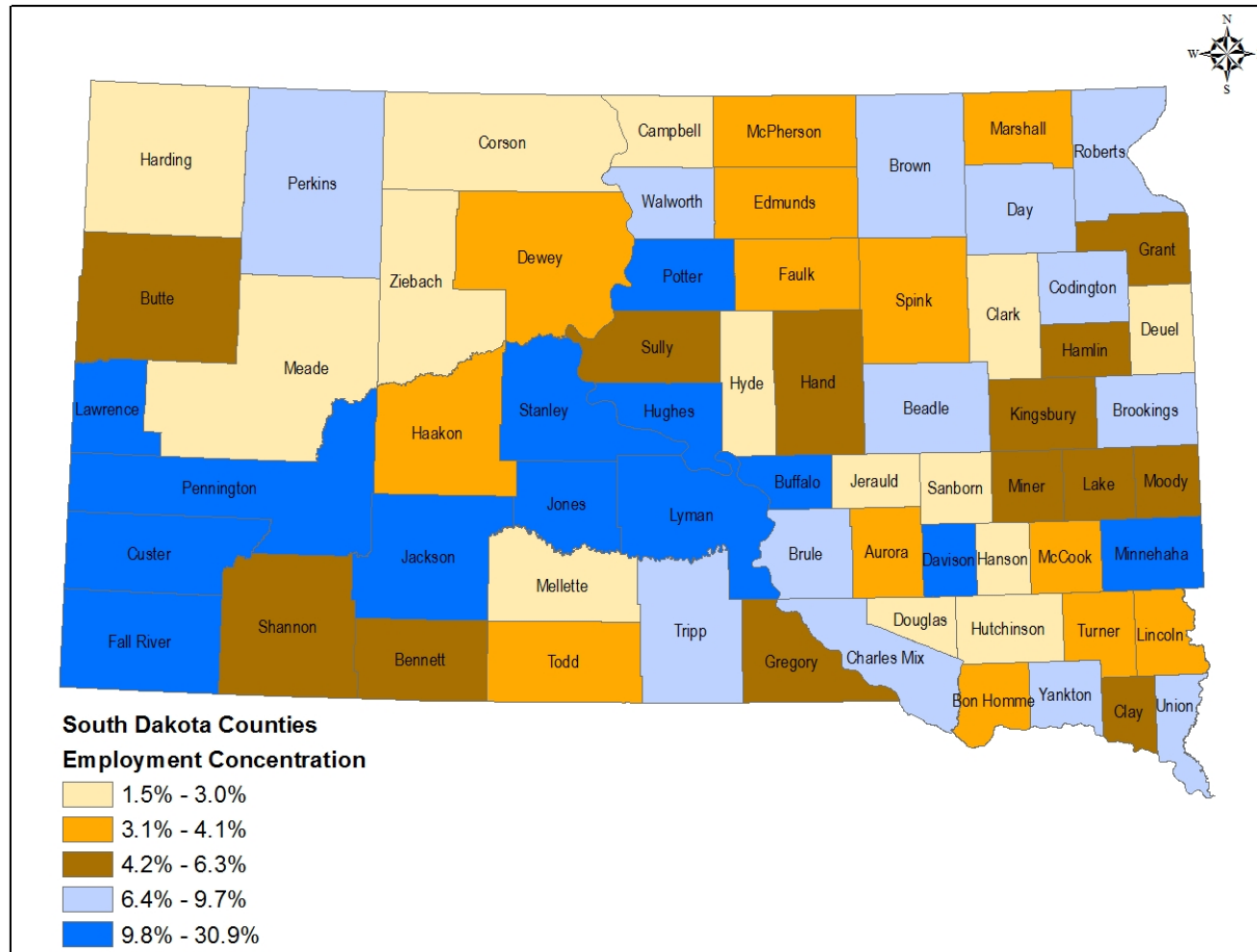
# County visitor spending growth

- Visitor spending growth in 2015 was evident in the non-Pennington Black Hills counties as well as in the Southeast Region.



# County tourism employment concentration

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



# Black Hills & Badlands

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- Black Hills & Badlands is the largest region of the state, measured by visitor spending, with nearly 40% of all visitor sales.
- More than half of all lodging sales in the state occur in the Black Hills & Badlands.
- The region grew at right around the state rate.
- Much of the region's spending occurs in Lawrence and Pennington Counties.
- One-in-three jobs in Lawrence County is supported by tourism.

# Black Hills & Badlands visitor spending timeline

Black Hills & Badlands Region							
County	(Millions)				Percent Change (2015/2014)	Share of Region	Share of State
	2012	2013	2014	2015			
Bennett County	\$4.47	\$4.03	\$4.70	\$4.67	-0.6%	0.31%	0.12%
Butte County	\$19.63	\$20.74	\$22.27	\$22.93	3.0%	1.54%	0.61%
Custer County	\$86.87	\$86.91	\$94.91	\$102.18	7.7%	6.86%	2.70%
Fall River County	\$29.00	\$28.32	\$31.08	\$32.44	4.4%	2.18%	0.86%
Haakon County	\$5.21	\$4.92	\$5.38	\$5.49	2.1%	0.37%	0.15%
Harding County	\$2.26	\$2.64	\$2.74	\$2.70	-1.7%	0.18%	0.07%
Jackson County	\$18.09	\$20.88	\$21.29	\$23.22	9.1%	1.56%	0.61%
Jones County	\$15.03	\$14.19	\$15.32	\$16.87	10.1%	1.13%	0.45%
Lawrence County	\$413.77	\$429.23	\$465.56	\$475.31	2.1%	31.92%	12.57%
Meade County	\$49.13	\$48.09	\$50.75	\$59.62	17.5%	4.00%	1.58%
Mellette County	\$2.53	\$2.58	\$2.44	\$2.36	-3.2%	0.16%	0.06%
Pennington County	\$650.39	\$664.12	\$705.32	\$701.06	-0.6%	47.08%	18.54%
Perkins County	\$7.37	\$7.50	\$7.94	\$11.86	49.3%	0.80%	0.31%
Shannon County	\$18.73	\$19.92	\$20.36	\$21.05	3.4%	1.41%	0.56%
Todd County	\$75.53	\$35.17	\$8.23	\$7.21	-12.4%	0.48%	0.19%
<b>Region Total</b>	<b>\$1,398.03</b>	<b>\$1,389.23</b>	<b>\$1,458.29</b>	<b>\$1,488.95</b>	<b>5.0%</b>	<b>100%</b>	<b>39.38%</b>
<b>State Total</b>	<b>\$3,531.49</b>	<b>\$3,572.76</b>	<b>\$3,707.51</b>	<b>\$3,780.68</b>	<b>3.8%</b>		<b>100%</b>



# 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	\$1.11	\$1.12	\$4.67	-0.6%	\$0.32
Butte County	\$4.04	\$5.48	\$2.28	\$3.72	\$7.41	\$22.93	3.0%	\$1.60
Custer County	\$30.91	\$16.06	\$18.58	\$16.15	\$20.48	\$102.18	7.7%	\$7.57
Fall River County	\$7.02	\$7.22	\$4.80	\$5.78	\$7.61	\$32.44	4.4%	\$2.27
Haakon County	\$0.55	\$0.77	\$0.41	\$2.11	\$1.65	\$5.49	2.1%	\$0.39
Harding County	\$0.49	\$0.71	\$0.23	\$0.41	\$0.85	\$2.70	-1.7%	\$0.20
Jackson County	\$5.65	\$2.85	\$3.65	\$4.70	\$6.36	\$23.22	9.1%	\$1.53
Jones County	\$3.59	\$3.16	\$2.28	\$2.78	\$5.06	\$16.87	10.1%	\$1.10
Lawrence County	\$149.00	\$99.61	\$111.25	\$65.40	\$50.04	\$475.31	2.1%	\$29.93
Meade County	\$11.32	\$15.60	\$6.89	\$11.45	\$14.35	\$59.62	17.5%	\$6.63
Mellette County	\$0.31	\$0.38	\$0.23	\$0.34	\$1.10	\$2.36	-3.2%	\$0.16
Pennington County	\$151.02	\$166.34	\$108.02	\$135.66	\$140.03	\$701.06	-0.6%	\$54.26
Perkins County	\$1.83	\$2.60	\$1.45	\$3.54	\$2.43	\$11.86	49.3%	\$0.84
Shannon County	\$4.74	\$5.73	\$1.64	\$2.47	\$6.47	\$21.05	3.4%	\$1.07
Todd County	\$1.20	\$1.12	\$0.61	\$0.92	\$3.37	\$7.21	-12.4%	\$0.44
<b>Region Total</b>	<b>\$372.38</b>	<b>\$328.75</b>	<b>\$262.93</b>	<b>\$256.55</b>	<b>\$268.34</b>	<b>\$1,488.95</b>	<b>2.1%</b>	<b>\$108.31</b>
<b>State Total</b>	<b>\$700.67</b>	<b>\$832.18</b>	<b>\$560.03</b>	<b>\$792.00</b>	<b>\$895.79</b>	<b>\$3,780.68</b>	<b>2.0%</b>	<b>\$270.39</b>

\* Lodging spending includes 2nd home valuation

\*\* Transport includes local and air transportation

# Black Hills & Badlands visitor spending, 2014

Black Hills & Badlands Region							
County	Visitor Spending - 2014 (millions)						Growth Rate
	Lodging*	F&B	Retail	Recreation	Transport**	Total	
Bennett County	\$0.64	\$1.11	\$0.57	\$1.16	\$1.21	\$4.70	16.7%
Butte County	\$3.54	\$5.11	\$2.13	\$3.54	\$7.96	\$22.27	7.4%
Custer County	\$26.85	\$14.57	\$17.03	\$14.90	\$21.57	\$94.91	9.2%
Fall River County	\$6.21	\$6.69	\$4.57	\$5.49	\$8.11	\$31.08	9.7%
Haakon County	\$0.50	\$0.71	\$0.39	\$2.03	\$1.74	\$5.38	9.3%
Harding County	\$0.46	\$0.68	\$0.23	\$0.41	\$0.95	\$2.74	3.8%
Jackson County	\$4.68	\$2.53	\$3.26	\$4.18	\$6.64	\$21.29	1.9%
Jones County	\$3.04	\$2.80	\$2.09	\$2.51	\$4.89	\$15.32	7.9%
Lawrence County	\$139.59	\$95.95	\$109.77	\$65.43	\$54.82	\$465.56	8.5%
Meade County	\$9.03	\$12.26	\$5.58	\$9.33	\$14.56	\$50.75	5.5%
Mellette County	\$0.29	\$0.36	\$0.22	\$0.34	\$1.23	\$2.44	-5.3%
Pennington County	\$141.05	\$162.61	\$107.98	\$136.41	\$157.26	\$705.32	6.2%
Perkins County	\$1.43	\$1.65	\$0.88	\$1.89	\$2.09	\$7.94	5.9%
Shannon County	\$4.30	\$5.36	\$1.54	\$2.16	\$7.00	\$20.36	2.2%
Todd County	\$1.09	\$1.28	\$0.62	\$1.27	\$3.98	\$8.23	-76.6%
<b>Region Total</b>	<b>\$342.70</b>	<b>\$313.67</b>	<b>\$256.86</b>	<b>\$251.04</b>	<b>\$294.03</b>	<b>\$1,458.29</b>	
<b>State Total</b>	<b>\$640.79</b>	<b>\$780.74</b>	<b>\$540.03</b>	<b>\$773.27</b>	<b>\$972.68</b>	<b>\$3,707.51</b>	<b>3.8%</b>

\* 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	62	80	0.5%	0.1%	4.7%	\$0.73	\$1.21
Butte County	227	296	1.7%	0.5%	5.5%	\$4.08	\$6.57
Custer County	603	879	5.0%	1.5%	16.2%	\$15.64	\$24.89
Fall River County	369	466	2.6%	0.8%	13.2%	\$6.73	\$9.58
Haakon County	38	61	0.3%	0.1%	3.6%	\$0.63	\$1.47
Harding County	21	29	0.2%	0.1%	2.3%	\$0.46	\$0.74
Jackson County	139	194	1.1%	0.3%	12.8%	\$2.15	\$3.28
Jones County	125	156	0.9%	0.3%	15.4%	\$2.10	\$2.81
Lawrence County	3,929	5,023	28.5%	8.5%	30.9%	\$95.09	\$132.11
Meade County	393	581	3.3%	1.0%	2.7%	\$8.24	\$14.57
Mellette County	18	27	0.2%	0.0%	2.6%	\$0.22	\$0.42
Pennington County	6,583	9,285	52.8%	15.8%	14.0%	\$142.79	\$257.07
Perkins County	114	163	0.9%	0.3%	7.6%	\$1.53	\$3.06
Shannon County	151	211	1.2%	0.4%	4.1%	\$2.60	\$4.19
Todd County	109	144	0.8%	0.2%	4.0%	\$1.88	\$2.97
<b>Region Total</b>	<b>12,819</b>	<b>17,594</b>		<b>29.9%</b>		<b>\$284.88</b>	<b>\$464.93</b>
<b>State Total</b>	<b>36,337</b>	<b>58,932</b>			<b>10.1%</b>	<b>\$733.97</b>	<b>\$1,403.92</b>

# Glacial Lakes & Prairies

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- Nearly \$600 million - 16% 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 \$40 million in state and local tax revenue is collected in this region.
- Much of the regions spending occurs in Brown, Brookings and Codington County.
- 5,900 jobs are directly supported by visitor spending in the region.

# Glacial Lakes & Prairies spending timeline

Glacial Lakes & Prairies Region							
County	(Millions)				Percent Change (2015/2014)	Share of Region	Share of State
	2012	2013	2014	2015			
Beadle County	\$54.53	\$52.58	\$52.09	\$49.41	-5.1%	8.37%	1.31%
Brookings County	\$86.52	\$88.03	\$91.59	\$90.68	-1.0%	15.35%	2.40%
Brown County	\$205.58	\$212.08	\$192.26	\$180.07	-6.3%	30.49%	4.76%
Clark County	\$5.00	\$4.60	\$4.66	\$4.57	-1.9%	0.77%	0.12%
Codington County	\$103.24	\$95.48	\$98.28	\$99.03	0.8%	16.77%	2.62%
Day County	\$13.35	\$14.35	\$15.08	\$16.49	9.4%	2.79%	0.44%
Deuel County	\$8.97	\$10.37	\$11.59	\$10.81	-6.8%	1.83%	0.29%
Edmunds County	\$10.76	\$11.17	\$11.52	\$11.18	-3.0%	1.89%	0.30%
Faulk County	\$5.84	\$5.51	\$5.61	\$5.07	-9.5%	0.86%	0.13%
Grant County	\$15.46	\$19.95	\$22.38	\$23.13	3.4%	3.92%	0.61%
Hamlin County	\$11.15	\$11.53	\$12.39	\$14.14	14.2%	2.39%	0.37%
Hand County	\$6.12	\$5.85	\$6.14	\$6.23	1.5%	1.05%	0.16%
Jerauld County	\$3.67	\$3.40	\$3.41	\$3.12	-8.5%	0.53%	0.08%
Kingsbury County	\$9.15	\$9.63	\$10.11	\$10.25	1.4%	1.74%	0.27%
McPherson County	\$4.61	\$4.38	\$4.55	\$4.23	-6.9%	0.72%	0.11%
Marshall County	\$8.77	\$8.72	\$7.56	\$7.46	-1.4%	1.26%	0.20%
Moody County	\$13.16	\$10.84	\$11.82	\$10.80	-8.6%	1.83%	0.29%
Roberts County	\$28.95	\$29.15	\$29.25	\$28.76	-1.7%	4.87%	0.76%
Sanborn County	\$2.52	\$2.76	\$3.01	\$2.65	-11.9%	0.45%	0.07%
Spink County	\$13.66	\$12.75	\$13.73	\$12.47	-9.2%	2.11%	0.33%
<b>Region Total</b>	<b>\$611.02</b>	<b>\$613.10</b>	<b>\$607.02</b>	<b>\$590.55</b>	<b>-1.0%</b>	<b>100%</b>	<b>15.62%</b>
<b>State Total</b>	<b>\$3,531.49</b>	<b>\$3,572.76</b>	<b>\$3,707.51</b>	<b>\$3,780.68</b>	<b>3.8%</b>		<b>100%</b>

# 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	\$6.55	\$9.39	\$6.82	\$10.51	\$16.15	\$49.41	-5.1%	\$3.57
Brookings County	\$14.28	\$24.44	\$9.98	\$15.09	\$26.88	\$90.68	-1.0%	\$6.71
Brown County	\$27.20	\$33.31	\$20.40	\$61.29	\$37.88	\$180.07	-6.3%	\$12.01
Clark County	\$0.39	\$0.74	\$0.35	\$1.31	\$1.78	\$4.57	-1.9%	\$0.40
Codington County	\$16.52	\$23.15	\$12.98	\$19.02	\$27.35	\$99.03	0.8%	\$6.96
Day County	\$3.39	\$4.56	\$1.50	\$3.53	\$3.51	\$16.49	9.4%	\$1.12
Deuel County	\$1.75	\$1.93	\$0.97	\$2.66	\$3.49	\$10.81	-6.8%	\$0.75
Edmunds County	\$1.02	\$1.46	\$0.47	\$1.94	\$6.28	\$11.18	-3.0%	\$0.74
Faulk County	\$0.78	\$1.07	\$0.41	\$0.59	\$2.22	\$5.07	-9.5%	\$0.32
Grant County	\$2.00	\$3.83	\$1.73	\$10.74	\$4.84	\$23.13	3.4%	\$1.56
Hamlin County	\$1.35	\$1.99	\$0.62	\$4.04	\$6.14	\$14.14	14.2%	\$0.87
Hand County	\$0.87	\$1.49	\$0.78	\$1.55	\$1.54	\$6.23	1.5%	\$0.58
Jerauld County	\$0.35	\$0.60	\$0.41	\$0.74	\$1.02	\$3.12	-8.5%	\$0.30
Kingsbury County	\$1.70	\$2.33	\$1.32	\$2.11	\$2.80	\$10.25	1.4%	\$0.81
McPherson County	\$0.49	\$0.70	\$0.26	\$1.20	\$1.58	\$4.23	-6.9%	\$0.40
Marshall County	\$1.62	\$2.44	\$0.40	\$0.83	\$2.17	\$7.46	-1.4%	\$0.52
Moody County	\$4.33	\$1.60	\$0.52	\$0.78	\$3.57	\$10.80	-8.6%	\$0.84
Roberts County	\$5.60	\$6.39	\$1.33	\$5.75	\$9.69	\$28.76	-1.7%	\$1.74
Sanborn County	\$0.27	\$0.59	\$0.11	\$0.67	\$1.02	\$2.65	-11.9%	\$0.23
Spink County	\$1.67	\$2.43	\$0.93	\$2.64	\$4.80	\$12.47	-9.2%	\$0.96
Region Total	\$92.11	\$124.43	\$62.30	\$147.00	\$164.71	\$590.55		\$41.36
State Total	\$700.67	\$832.18	\$560.03	\$792.00	\$895.79	\$3,780.68	2.0%	\$270.39

# Glacial Lakes & Prairies spending, 2014

Glacial Lakes & Prairies Region							
County	Visitor Spending - 2014 (millions)						Growth Rate
	Lodging*	F&B	Retail	Recreation	Transport**	Total	
Beadle County	\$6.29	\$9.47	\$7.09	\$11.05	\$18.20	\$52.09	-0.9%
Brookings County	\$13.38	\$23.75	\$9.89	\$15.13	\$29.44	\$91.59	4.1%
Brown County	\$25.48	\$34.30	\$21.22	\$67.99	\$43.28	\$192.26	-9.3%
Clark County	\$0.37	\$0.71	\$0.31	\$1.30	\$1.96	\$4.66	1.3%
Codington County	\$14.58	\$22.63	\$12.83	\$18.98	\$29.26	\$98.28	2.9%
Day County	\$2.84	\$4.08	\$1.28	\$3.21	\$3.67	\$15.08	5.1%
Deuel County	\$1.68	\$1.94	\$1.02	\$2.94	\$4.01	\$11.59	11.8%
Edmunds County	\$0.98	\$1.43	\$0.50	\$1.96	\$6.66	\$11.52	3.2%
Faulk County	\$0.71	\$1.09	\$0.43	\$0.63	\$2.74	\$5.61	1.7%
Grant County	\$1.65	\$3.51	\$1.58	\$10.49	\$5.14	\$22.38	12.2%
Hamlin County	\$1.18	\$1.69	\$0.45	\$3.08	\$5.98	\$12.39	7.4%
Hand County	\$0.88	\$1.41	\$0.77	\$1.44	\$1.63	\$6.14	4.9%
Jerauld County	\$0.33	\$0.58	\$0.42	\$0.76	\$1.31	\$3.41	0.3%
Kingsbury County	\$1.51	\$2.14	\$1.23	\$2.00	\$3.24	\$10.11	5.0%
McPherson County	\$0.48	\$0.68	\$0.27	\$1.19	\$1.92	\$4.55	3.9%
Marshall County	\$1.49	\$2.39	\$0.41	\$0.87	\$2.39	\$7.56	-13.3%
Moody County	\$4.20	\$1.74	\$0.65	\$1.00	\$4.23	\$11.82	9.0%
Roberts County	\$5.25	\$6.15	\$1.32	\$5.80	\$10.73	\$29.25	0.3%
Sanborn County	\$0.21	\$0.60	\$0.09	\$0.97	\$1.14	\$3.01	9.1%
Spink County	\$1.67	\$2.48	\$0.99	\$2.85	\$5.74	\$13.73	7.7%
<b>Region Total</b>	<b>\$85.14</b>	<b>\$122.78</b>	<b>\$62.78</b>	<b>\$153.64</b>	<b>\$182.66</b>	<b>\$607.02</b>	
<b>State Total</b>	<b>\$640.79</b>	<b>\$780.74</b>	<b>\$540.03</b>	<b>\$773.27</b>	<b>\$972.68</b>	<b>\$3,707.51</b>	<b>3.8%</b>

\* Lodging spending includes 2nd home valuation

\*\* Transport includes local and air transportation

# 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	534	815	8.8%	1.4%	6.9%	\$10.07	\$20.92
Brookings County	1,300	1,853	20.1%	3.1%	7.7%	\$22.38	\$40.75
Brown County	1,964	2,744	29.7%	4.7%	9.6%	\$39.12	\$72.11
Clark County	27	42	0.5%	0.1%	1.8%	\$0.50	\$1.06
Codington County	1,060	1,596	17.3%	2.7%	7.5%	\$18.78	\$38.89
Day County	202	272	3.0%	0.5%	7.9%	\$2.94	\$5.19
Deuel County	62	92	1.0%	0.2%	3.0%	\$1.11	\$2.54
Edmunds County	64	98	1.1%	0.2%	3.7%	\$1.50	\$3.04
Faulk County	38	57	0.6%	0.1%	3.8%	\$0.49	\$1.23
Grant County	206	324	3.5%	0.5%	5.4%	\$3.36	\$8.03
Hamlin County	76	119	1.3%	0.2%	4.2%	\$1.93	\$3.60
Hand County	92	139	1.5%	0.2%	5.6%	\$1.15	\$2.84
Jerauld County	23	40	0.4%	0.1%	1.6%	\$0.46	\$1.55
Kingsbury County	119	172	1.9%	0.3%	5.6%	\$1.61	\$3.60
McPherson County	37	57	0.6%	0.1%	4.1%	\$0.58	\$1.22
Marshall County	68	90	1.0%	0.2%	3.3%	\$1.03	\$1.76
Moody County	97	145	1.6%	0.2%	4.2%	\$2.05	\$4.01
Roberts County	291	378	4.1%	0.6%	7.0%	\$3.75	\$6.55
Sanborn County	18	36	0.4%	0.1%	2.7%	\$0.34	\$1.09
Spink County	102	162	1.8%	0.3%	4.1%	\$1.92	\$4.23
<b>Region Total</b>	<b>5,847</b>	<b>9,231</b>		<b>15.7%</b>		<b>\$115.06</b>	<b>\$224.20</b>
<b>State Total</b>	<b>36,337</b>	<b>58,932</b>			<b>10.1%</b>	<b>\$733.97</b>	<b>\$1,403.92</b>



# Missouri River

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- More than \$310 million – 8.2% of the visitor spending in South Dakota - occurs in the Missouri River region.
- Visitors to the region spent \$66.6 million at lodging establishments in 2015.
- The two largest counties are Hughes and Lyman County.
- 4,400 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 (2015/2014)	Share of Region	Share of State
	2012	2013	2014	2015			
Aurora County	\$6.21	\$5.88	\$5.85	\$5.94	1.6%	1.91%	0.16%
Brule County	\$28.08	\$25.82	\$26.43	\$27.88	5.5%	8.97%	0.74%
Buffalo County	\$5.06	\$5.79	\$6.03	\$5.63	-6.7%	1.81%	0.15%
Campbell County	\$2.40	\$2.29	\$2.80	\$2.80	0.1%	0.90%	0.07%
Charles Mix County	\$28.51	\$30.60	\$27.37	\$26.69	-2.5%	8.58%	0.71%
Corson County	\$2.64	\$2.82	\$2.94	\$2.76	-6.2%	0.89%	0.07%
Dewey County	\$8.57	\$10.33	\$11.28	\$10.46	-7.2%	3.36%	0.28%
Gregory County	\$10.94	\$10.97	\$11.36	\$11.42	0.5%	3.67%	0.30%
Hughes County	\$82.04	\$83.72	\$87.16	\$79.93	-8.3%	25.70%	2.11%
Hyde County	\$1.66	\$1.65	\$1.99	\$1.93	-2.6%	0.62%	0.05%
Lyman County	\$20.68	\$31.58	\$36.48	\$37.97	4.1%	12.21%	1.00%
Potter County	\$19.40	\$18.62	\$18.50	\$16.77	-9.3%	5.39%	0.44%
Stanley County	\$20.11	\$18.49	\$20.20	\$21.82	8.0%	7.02%	0.58%
Sully County	\$7.93	\$7.91	\$8.75	\$8.88	1.5%	2.86%	0.23%
Tripp County	\$21.12	\$19.97	\$20.58	\$21.32	3.6%	6.86%	0.56%
Walworth County	\$26.23	\$26.37	\$27.24	\$28.06	3.0%	9.02%	0.74%
Ziebach County	\$0.66	\$0.76	\$0.70	\$0.71	0.3%	0.23%	0.02%
<b>Region Total</b>	<b>\$292.24</b>	<b>\$303.55</b>	<b>\$315.65</b>	<b>\$310.99</b>	<b>-1.5%</b>	<b>100%</b>	<b>8.23%</b>
<b>State Total</b>	<b>\$3,531.49</b>	<b>\$3,572.76</b>	<b>\$3,707.51</b>	<b>\$3,780.68</b>	<b>2.0%</b>		<b>100%</b>

# 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	\$0.51	\$0.41	\$3.67	\$5.94	1.6%	\$0.48
Brule County	\$4.79	\$7.21	\$3.26	\$6.40	\$6.22	\$27.88	5.5%	\$1.93
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	0.1%	\$0.21
Charles Mix County	\$7.82	\$4.19	\$3.67	\$4.24	\$6.76	\$26.69	-2.5%	\$1.64
Corson County	\$0.23	\$0.82	\$0.06	\$0.22	\$1.43	\$2.76	-6.2%	\$0.19
Dewey County	\$1.22	\$1.74	\$0.91	\$2.30	\$4.29	\$10.46	-7.2%	\$0.60
Gregory County	\$1.68	\$2.84	\$2.33	\$1.77	\$2.81	\$11.42	0.5%	\$0.90
Hughes County	\$16.18	\$18.46	\$12.23	\$15.47	\$17.59	\$79.93	-8.3%	\$6.28
Hyde County	\$0.24	\$0.23	\$0.25	\$0.81	\$0.40	\$1.93	-2.6%	\$0.21
Lyman County	\$9.40	\$4.24	\$6.53	\$8.52	\$9.28	\$37.97	4.1%	\$2.53
Potter County	\$5.61	\$2.29	\$1.41	\$3.42	\$4.05	\$16.77	-9.3%	\$1.04
Stanley County	\$5.04	\$5.08	\$3.27	\$4.30	\$4.14	\$21.82	8.0%	\$1.43
Sully County	\$0.39	\$2.40	\$4.65	\$0.60	\$0.83	\$8.88	1.5%	\$0.59
Tripp County	\$3.32	\$4.21	\$2.25	\$7.00	\$4.52	\$21.32	3.6%	\$1.45
Walworth County	\$7.32	\$6.13	\$2.58	\$5.36	\$6.68	\$28.06	3.0%	\$1.84
Ziebach County	\$0.07	\$0.33	\$0.01	\$0.15	\$0.14	\$0.71	0.3%	\$0.07
<b>Region Total</b>	<b>\$66.80</b>	<b>\$62.72</b>	<b>\$44.56</b>	<b>\$62.46</b>	<b>\$74.45</b>	<b>\$310.99</b>		<b>\$21.72</b>
<b>State Total</b>	<b>\$700.67</b>	<b>\$832.18</b>	<b>\$560.03</b>	<b>\$792.00</b>	<b>\$895.79</b>	<b>\$3,780.68</b>	<b>2.0%</b>	<b>\$270.39</b>

\* Lodging spending includes 2nd home valuation

\*\* Transport includes local and air transportation

# Missouri River visitor spending, 2014

Missouri River Region							
County	Visitor Spending - 2014 (millions)						Growth Rate
	Lodging*	F&B	Retail	Recreation	Transport**	Total	
Aurora County	\$0.46	\$0.81	\$0.50	\$0.39	\$3.69	\$5.85	-0.5%
Brule County	\$4.13	\$6.59	\$3.00	\$6.02	\$6.69	\$26.43	2.4%
Buffalo County	\$2.13	\$0.78	\$1.17	\$0.87	\$1.07	\$6.03	4.2%
Campbell County	\$0.64	\$0.82	\$0.05	\$0.56	\$0.73	\$2.80	22.2%
Charles Mix County	\$7.34	\$4.18	\$3.83	\$4.47	\$7.55	\$27.37	-10.5%
Corson County	\$0.22	\$0.82	\$0.06	\$0.23	\$1.62	\$2.94	4.3%
Dewey County	\$1.19	\$1.69	\$0.98	\$2.49	\$4.93	\$11.28	9.2%
Gregory County	\$1.57	\$2.69	\$2.26	\$1.74	\$3.10	\$11.36	3.6%
Hughes County	\$16.38	\$19.36	\$13.14	\$16.78	\$21.50	\$87.16	4.1%
Hyde County	\$0.21	\$0.22	\$0.26	\$0.87	\$0.43	\$1.99	20.2%
Lyman County	\$8.27	\$3.89	\$6.20	\$8.05	\$10.06	\$36.48	15.5%
Potter County	\$5.47	\$2.52	\$1.69	\$3.73	\$5.09	\$18.50	-0.6%
Stanley County	\$4.34	\$4.59	\$3.01	\$3.94	\$4.31	\$20.20	9.3%
Sully County	\$0.36	\$2.47	\$4.41	\$0.61	\$0.89	\$8.75	10.6%
Tripp County	\$2.88	\$3.88	\$2.10	\$6.78	\$4.93	\$20.58	3.0%
Walworth County	\$6.74	\$5.67	\$2.46	\$5.12	\$7.25	\$27.24	3.3%
Ziebach County	\$0.06	\$0.31	\$0.02	\$0.17	\$0.16	\$0.70	-7.5%
<b>Region Total</b>	<b>\$62.41</b>	<b>\$61.31</b>	<b>\$45.11</b>	<b>\$62.82</b>	<b>\$84.01</b>	<b>\$315.65</b>	
<b>State Total</b>	<b>\$640.79</b>	<b>\$780.74</b>	<b>\$540.03</b>	<b>\$773.27</b>	<b>\$972.68</b>	<b>\$3,707.51</b>	<b>3.8%</b>

\* 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	40	77	1.8%	0.1%	3.9%	\$0.76	\$2.20
Brule County	256	332	7.5%	0.6%	9.3%	\$4.40	\$6.90
Buffalo County	66	82	1.9%	0.1%	9.8%	\$1.22	\$1.83
Campbell County	14	22	0.5%	0.0%	2.0%	\$0.27	\$0.53
Charles Mix County	294	411	9.3%	0.7%	7.2%	\$4.50	\$8.24
Corson County	16	26	0.6%	0.0%	1.5%	\$0.28	\$0.71
Dewey County	61	115	2.6%	0.2%	3.6%	\$1.34	\$3.17
Gregory County	132	173	3.9%	0.3%	6.2%	\$1.88	\$3.23
Hughes County	976	1,372	31.1%	2.3%	9.9%	\$18.75	\$35.01
Hyde County	18	34	0.8%	0.1%	2.8%	\$0.36	\$1.14
Lyman County	489	636	14.4%	1.1%	26.1%	\$7.18	\$10.82
Potter County	139	215	4.9%	0.4%	13.4%	\$2.63	\$5.27
Stanley County	165	206	4.7%	0.4%	9.7%	\$2.58	\$3.71
Sully County	63	79	1.8%	0.1%	6.2%	\$1.77	\$2.35
Tripp County	187	265	6.0%	0.5%	7.1%	\$3.64	\$6.55
Walworth County	242	351	8.0%	0.6%	9.7%	\$4.62	\$8.39
Ziebach County	8	13	0.3%	0.0%	1.5%	\$0.14	\$0.30
<b>Region Total</b>	<b>3,126</b>	<b>4,410</b>		<b>7.5%</b>		<b>\$56.32</b>	<b>\$100.34</b>
<b>State Total</b>	<b>36,337</b>	<b>58,932</b>			<b>10.1%</b>	<b>\$733.97</b>	<b>\$1,403.92</b>

# Southeast

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- The Southeast region, measured by visitor spending, ranks 2<sup>nd</sup> among the four regions of the state.
- Nearly \$1.4 billion - 36% of the visitor spending in South Dakota - occurs in the Southeast region.
- 70% of the region's spending is spent in Minnehaha County; Minnehaha County captures nearly 25% of all visitor spending state-wide.
- Lincoln County is one of the fastest growing counties in the state, ranking 2<sup>nd</sup> highest in 2015.
- With higher wages paid in the region, 44% of the state's tourism-generated labor income goes to employees in the Southeast region.

# Southeast spending timeline

Southeast Region							
County	(Millions)				Percent Change (2015/2014)	Share of Region	Share of State
	2012	2013	2014	2015			
Bon Homme County	\$5.68	\$5.47	\$6.12	\$5.84	-4.5%	0.42%	0.15%
Clay County	\$25.63	\$25.41	\$27.39	\$28.31	3.4%	2.04%	0.75%
Davison County	\$105.04	\$100.56	\$107.44	\$107.27	-0.2%	7.72%	2.84%
Douglas County	\$3.42	\$3.38	\$3.38	\$3.47	2.6%	0.25%	0.09%
Hanson County	\$2.13	\$2.36	\$2.81	\$2.83	0.8%	0.20%	0.07%
Hutchinson County	\$9.72	\$8.98	\$9.37	\$9.39	0.3%	0.68%	0.25%
Lake County	\$25.96	\$25.24	\$25.31	\$23.98	-5.2%	1.73%	0.63%
Lincoln County	\$38.86	\$42.71	\$51.25	\$67.89	32.5%	4.88%	1.80%
McCook County	\$10.14	\$9.67	\$10.33	\$10.75	4.1%	0.77%	0.28%
Miner County	\$4.71	\$4.43	\$4.67	\$5.30	13.6%	0.38%	0.14%
Minnehaha County	\$886.26	\$926.49	\$955.41	\$997.93	4.4%	71.78%	26.40%
Turner County	\$6.10	\$6.88	\$7.55	\$7.28	-3.6%	0.52%	0.19%
Union County	\$41.92	\$42.28	\$47.33	\$49.27	4.1%	3.54%	1.30%
Yankton County	\$64.62	\$63.01	\$68.20	\$70.67	3.6%	5.08%	1.87%
<b>Region Total</b>	<b>\$1,230.21</b>	<b>\$1,266.87</b>	<b>\$1,326.54</b>	<b>\$1,390.19</b>	<b>4.8%</b>	<b>100%</b>	<b>36.77%</b>
<b>State Total</b>	<b>\$3,531.49</b>	<b>\$3,572.76</b>	<b>\$3,707.51</b>	<b>\$3,780.68</b>	<b>2.0%</b>		<b>100%</b>

# 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	-4.5%	\$0.50
Clay County	\$3.60	\$8.38	\$2.23	\$3.40	\$10.70	\$28.31	3.4%	\$2.07
Davison County	\$18.88	\$23.91	\$16.83	\$21.37	\$26.27	\$107.27	-0.2%	\$7.45
Douglas County	\$0.25	\$0.74	\$0.14	\$0.91	\$1.43	\$3.47	2.6%	\$0.32
Hanson County	\$0.50	\$0.58	\$0.30	\$0.50	\$0.95	\$2.83	0.8%	\$0.29
Hutchinson County	\$0.92	\$1.72	\$0.77	\$2.10	\$3.88	\$9.39	0.3%	\$0.80
Lake County	\$2.73	\$7.31	\$3.78	\$4.22	\$5.94	\$23.98	-5.2%	\$1.71
Lincoln County	\$5.54	\$15.57	\$13.69	\$9.05	\$24.04	\$67.89	32.5%	\$6.46
McCook County	\$1.49	\$1.72	\$0.97	\$3.52	\$3.06	\$10.75	4.1%	\$0.75
Miner County	\$0.87	\$1.11	\$0.51	\$1.57	\$1.24	\$5.30	13.6%	\$0.41
Minnehaha County	\$118.73	\$219.70	\$128.93	\$253.59	\$276.98	\$997.93	4.4%	\$68.67
Turner County	\$0.71	\$1.26	\$0.73	\$1.51	\$3.07	\$7.28	-3.6%	\$0.71
Union County	\$5.63	\$11.29	\$11.25	\$8.37	\$12.73	\$49.27	4.1%	\$4.26
Yankton County	\$8.99	\$20.90	\$9.69	\$15.46	\$15.63	\$70.67	3.6%	\$4.60
<b>Region Total</b>	<b>\$169.38</b>	<b>\$316.28</b>	<b>\$190.23</b>	<b>\$325.99</b>	<b>\$388.30</b>	<b>\$1,390.19</b>		<b>\$98.99</b>
<b>State Total</b>	<b>\$700.67</b>	<b>\$832.18</b>	<b>\$560.03</b>	<b>\$792.00</b>	<b>\$895.79</b>	<b>\$3,780.68</b>	<b>2.0%</b>	<b>\$270.39</b>

\* Lodging spending includes 2nd home valuation

\*\* Transport includes local and air transportation



# Southeast visitor spending, 2014

Southeast Region							
County	Visitor Spending - 2014 (millions)						Growth Rate
	Lodging*	F&B	Retail	Recreation	Transport**	Total	
Bon Homme County	\$0.50	\$2.08	\$0.43	\$0.44	\$2.67	\$6.12	11.8%
Clay County	\$3.16	\$8.07	\$2.08	\$3.21	\$10.87	\$27.39	7.8%
Davison County	\$17.30	\$23.11	\$16.65	\$21.27	\$29.12	\$107.44	6.8%
Douglas County	\$0.22	\$0.66	\$0.12	\$0.83	\$1.55	\$3.38	0.0%
Hanson County	\$0.44	\$0.55	\$0.29	\$0.49	\$1.04	\$2.81	19.1%
Hutchinson County	\$0.79	\$1.61	\$0.73	\$2.05	\$4.19	\$9.37	4.3%
Lake County	\$2.52	\$7.15	\$3.75	\$4.42	\$7.47	\$25.31	0.3%
Lincoln County	\$2.62	\$9.74	\$9.76	\$6.95	\$22.17	\$51.25	20.0%
McCook County	\$1.27	\$1.55	\$0.88	\$3.36	\$3.25	\$10.33	6.8%
Miner County	\$0.71	\$0.93	\$0.41	\$1.34	\$1.28	\$4.67	5.5%
Minnehaha County	\$107.84	\$196.35	\$119.55	\$237.24	\$294.43	\$955.41	3.1%
Turner County	\$0.65	\$1.22	\$0.72	\$1.52	\$3.44	\$7.55	9.7%
Union County	\$4.69	\$10.45	\$10.78	\$7.89	\$13.52	\$47.33	11.9%
Yankton County	\$7.81	\$19.50	\$9.12	\$14.77	\$17.00	\$68.20	8.2%
<b>Region Total</b>	<b>\$150.54</b>	<b>\$282.98</b>	<b>\$175.27</b>	<b>\$305.77</b>	<b>\$411.98</b>	<b>\$1,326.54</b>	
<b>State Total</b>	<b>\$640.79</b>	<b>\$780.74</b>	<b>\$540.03</b>	<b>\$773.27</b>	<b>\$972.68</b>	<b>\$3,707.51</b>	<b>3.8%</b>

\* 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	72	114	0.5%	0.2%	3.3%	\$1.15	\$2.58
Clay County	364	569	2.7%	1.0%	4.8%	\$5.22	\$11.15
Davison County	1,307	1,775	8.5%	3.0%	11.0%	\$22.81	\$40.87
Douglas County	25	48	0.2%	0.1%	2.2%	\$0.28	\$1.15
Hanson County	22	39	0.2%	0.1%	2.5%	\$0.44	\$1.27
Hutchinson County	74	130	0.6%	0.2%	2.9%	\$1.07	\$3.17
Lake County	336	437	2.1%	0.7%	5.8%	\$4.81	\$8.87
Lincoln County	488	1,035	4.9%	1.8%	3.3%	\$9.32	\$37.50
McCook County	71	106	0.5%	0.2%	3.6%	\$0.97	\$2.24
Miner County	51	75	0.4%	0.1%	4.4%	\$0.65	\$1.51
Minnehaha County	9,734	14,445	69.0%	24.5%	9.7%	\$207.90	\$442.52
Turner County	65	136	0.6%	0.2%	3.4%	\$0.87	\$3.51
Union County	516	837	4.0%	1.4%	7.0%	\$9.12	\$28.82
Yankton County	784	1,187	5.7%	2.0%	8.2%	\$13.09	\$29.28
<b>Region Total</b>	<b>13,837</b>	<b>20,932</b>		<b>35.5%</b>		<b>\$277.71</b>	<b>\$614.44</b>
<b>State Total</b>	<b>36,337</b>	<b>58,932</b>			<b>10.1%</b>	<b>\$733.97</b>	<b>\$1,403.92</b>

# Methodology and Background



TOURISM  
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# Definitions and terms

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- 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

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- 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

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- 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

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- 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

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<b>Spend Category</b>	<b>Description</b>
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

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- 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](mailto:info@tourismeconomics.com).



# TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

For more information:

Adam Sacks, President

[adam@tourismeconomics.com](mailto:adam@tourismeconomics.com)

Christopher Pike, Director

[cpike@tourismeconomics.com](mailto:cpike@tourismeconomics.com)