



The Economic Impact of Tourism in South Dakota

County Analysis Calendar Year 2018



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Counties



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

Regions

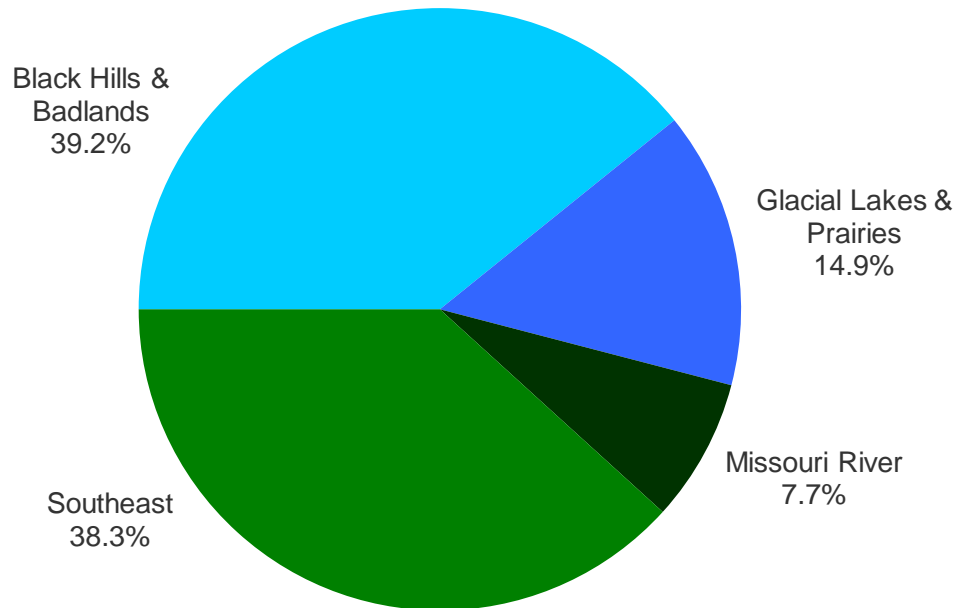
- The following tables present the county spending and impact information, broken out into the four tourism regions in South Dakota:
 - Black Hills & Badlands
 - Missouri River
 - Glacial Lakes & Prairies
 - Southeast
- Ranked by visitor spending, the Black Hills & Badlands and Southeast regions are the largest, together accounting for more than 77% of all spending in the state.
- Growth was strongest in the Southeast Region, increasing 3.6% in 2018.

Regions

South Dakota Visitor Spending (by region)

	2014	2015	2016	2017	2018	% Chnge
Black Hills & Badlands	\$1,458.29	\$1,498.96	\$1,491.71	\$1,529.70	\$1,560.25	2.0%
Glacial Lakes & Prairies	\$607.02	\$582.93	\$581.19	\$583.25	\$591.35	1.4%
Missouri River	\$315.65	\$310.69	\$302.92	\$300.13	\$305.95	1.9%
Southeast	\$1,326.54	\$1,387.70	\$1,460.01	\$1,470.08	\$1,522.67	3.6%
Grand Total	\$3,707.51	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	2.5%

Tourism Industry Sales By Region 2018



Black Hills & Badlands

- Black Hills & Badlands is the largest region of the state, measured by visitor spending, with 39.2% of all visitor sales.
- Visitor activity in Meade County jumped as visitor spending grew 11%.
- 80% of the region's spending occurs in Lawrence and Pennington Counties with Pennington representing 19.8% of all visitor spending in the state.
- More than 18,600 jobs are supported by visitor spending in the region – nearly three times the population of the City of Sturgis.
- Six counties in the region have AT LEAST one-in-ten county jobs supported by tourism with one-in-eleven jobs supported region-wide.

Black Hills & Badlands visitor spending timeline

Black Hills & Badlands Region

County	(Millions)					Percent Change (2018/2017)	Share of Region	Share of State
	2014	2015	2016	2017	2018			
Bennett County	\$4.70	\$4.65	\$4.74	\$4.97	\$4.65	-6.5%	0.30%	0.12%
Butte County	\$22.36	\$22.96	\$20.85	\$21.07	\$21.56	2.3%	1.38%	0.54%
Custer County	\$94.81	\$102.19	\$109.74	\$114.65	\$109.71	-4.3%	7.03%	2.76%
Fall River County	\$31.21	\$32.76	\$37.83	\$35.67	\$35.28	-1.1%	2.26%	0.89%
Haakon County	\$5.42	\$5.49	\$4.96	\$5.04	\$5.44	7.8%	0.35%	0.14%
Harding County	\$2.74	\$2.70	\$2.47	\$2.24	\$2.86	27.4%	0.18%	0.07%
Jackson County	\$21.27	\$23.12	\$24.23	\$23.82	\$25.25	6.0%	1.62%	0.63%
Jones County	\$15.10	\$16.73	\$16.72	\$16.27	\$16.41	0.9%	1.05%	0.41%
Lawrence County	\$466.32	\$476.56	\$439.79	\$444.39	\$457.70	3.0%	29.33%	11.50%
Meade County	\$51.05	\$53.25	\$48.09	\$47.01	\$52.12	10.9%	3.34%	1.31%
Mellette County	\$2.31	\$2.27	\$2.26	\$2.26	\$2.32	2.9%	0.15%	0.06%
Oglala Lakota County	\$20.44	\$21.00	\$20.61	\$21.14	\$21.59	2.1%	1.38%	0.54%
Pennington County	\$702.88	\$714.49	\$740.69	\$773.78	\$787.52	1.8%	50.47%	19.79%
Perkins County	\$7.95	\$11.95	\$12.20	\$11.15	\$11.43	2.5%	0.73%	0.29%
Todd County	\$8.25	\$7.22	\$6.54	\$6.23	\$6.42	3.0%	0.41%	0.16%
Region Total	\$1,456.81	\$1,497.34	\$1,491.71	\$1,529.70	\$1,560.25	2.0%	100%	39.20%
State Total	\$3,707.57	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	2.5%		100%

Black Hills & Badlands visitor spending, 2018

Black Hills & Badlands Region

County	Visitor Spending - 2018 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bennett County	\$0.74	\$1.08	\$0.63	\$1.11	\$1.09	\$4.65	-6.5%	\$0.37
Butte County	\$3.85	\$4.88	\$2.16	\$3.50	\$7.18	\$21.56	2.3%	\$1.61
Custer County	\$33.51	\$17.47	\$20.35	\$17.40	\$20.99	\$109.71	-4.3%	\$9.04
Fall River County	\$7.82	\$8.19	\$5.20	\$6.15	\$7.92	\$35.28	-1.1%	\$2.57
Haakon County	\$0.52	\$0.73	\$0.41	\$2.04	\$1.73	\$5.44	7.8%	\$0.40
Harding County	\$0.54	\$0.77	\$0.27	\$0.41	\$0.86	\$2.86	27.4%	\$0.19
Jackson County	\$6.24	\$3.30	\$4.01	\$5.14	\$6.56	\$25.25	6.0%	\$1.71
Jones County	\$3.55	\$3.15	\$2.27	\$2.75	\$4.68	\$16.41	0.9%	\$1.14
Lawrence County	\$145.64	\$95.89	\$107.25	\$63.07	\$45.84	\$457.70	3.0%	\$30.51
Meade County	\$10.03	\$13.73	\$5.41	\$8.62	\$14.33	\$52.12	10.9%	\$5.74
Mellette County	\$0.34	\$0.41	\$0.24	\$0.34	\$0.99	\$2.32	2.9%	\$0.17
Oglala Lakota County	\$5.02	\$6.18	\$1.73	\$2.58	\$6.08	\$21.59	2.1%	\$1.17
Pennington County	\$172.96	\$190.14	\$125.27	\$154.69	\$144.46	\$787.52	1.8%	\$62.86
Perkins County	\$1.80	\$2.60	\$1.41	\$3.27	\$2.33	\$11.43	2.5%	\$0.79
Todd County	\$1.05	\$0.95	\$0.49	\$0.73	\$3.20	\$6.42	3.0%	\$0.42
Region Total	\$393.62	\$349.49	\$277.10	\$271.80	\$268.24	\$1,560.25	2.0%	\$118.70
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$920.28	\$3,980.23	2.5%	\$298.29

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Black Hills & Badlands visitor spending, 2017

Black Hills & Badlands Region

County	Visitor Spending - 2017 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bennett County	\$0.79	\$1.17	\$0.66	\$1.19	\$1.16	\$4.97	4.8%	\$0.36
Butte County	\$3.74	\$4.93	\$2.17	\$3.48	\$6.75	\$21.07	1.1%	\$1.58
Custer County	\$35.00	\$18.18	\$21.80	\$18.54	\$21.14	\$114.65	4.5%	\$8.79
Fall River County	\$7.98	\$8.13	\$5.42	\$6.38	\$7.76	\$35.67	-5.7%	\$2.50
Haakon County	\$0.48	\$0.69	\$0.37	\$1.88	\$1.61	\$5.04	1.6%	\$0.39
Harding County	\$0.44	\$0.59	\$0.22	\$0.33	\$0.66	\$2.24	-9.1%	\$0.19
Jackson County	\$5.88	\$3.10	\$3.88	\$4.89	\$6.06	\$23.82	-1.7%	\$1.66
Jones County	\$3.53	\$3.12	\$2.32	\$2.77	\$4.53	\$16.27	-2.7%	\$1.10
Lawrence County	\$139.49	\$93.30	\$106.08	\$61.23	\$44.29	\$444.39	1.0%	\$29.66
Meade County	\$8.96	\$12.68	\$5.04	\$8.03	\$12.31	\$47.01	-2.2%	\$5.61
Mellette County	\$0.34	\$0.38	\$0.24	\$0.35	\$0.94	\$2.26	-0.1%	\$0.17
Oglala Lakota County	\$4.89	\$5.98	\$1.74	\$2.56	\$5.98	\$21.14	2.6%	\$1.13
Pennington County	\$170.40	\$187.00	\$125.28	\$154.82	\$136.28	\$773.78	4.5%	\$61.25
Perkins County	\$1.77	\$2.47	\$1.38	\$3.30	\$2.22	\$11.15	-8.6%	\$0.77
Todd County	\$1.02	\$1.00	\$0.48	\$0.71	\$3.02	\$6.23	-4.7%	\$0.41
Region Total	\$384.70	\$342.72	\$277.10	\$270.46	\$254.72	\$1,529.70	2.5%	\$115.59
State Total	\$722.46	\$868.72	\$595.86	\$826.52	\$869.60	\$3,883.16	1.2%	\$290.95

* 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	53	72	0.4%	0.1%	4.8%	\$0.76	\$1.33
Butte County	214	282	1.5%	0.5%	5.3%	\$4.11	\$6.56
Custer County	665	987	5.3%	1.8%	22.8%	\$17.50	\$29.46
Fall River County	414	521	2.8%	1.0%	12.4%	\$8.13	\$11.61
Haakon County	38	63	0.3%	0.1%	3.8%	\$0.69	\$1.64
Harding County	25	32	0.2%	0.1%	2.9%	\$0.52	\$0.75
Jackson County	161	220	1.2%	0.4%	15.6%	\$2.79	\$4.34
Jones County	118	150	0.8%	0.3%	17.7%	\$2.33	\$3.41
Lawrence County	3,894	4,972	26.7%	9.1%	28.8%	\$103.72	\$141.27
Meade County	349	505	2.7%	0.9%	4.1%	\$8.42	\$14.15
Mellette County	26	35	0.2%	0.1%	4.5%	\$0.36	\$0.55
Oglala Lakota County	150	215	1.2%	0.4%	4.4%	\$2.97	\$4.78
Pennington County	7,181	10,243	55.1%	18.7%	13.0%	\$168.05	\$300.60
Perkins County	113	167	0.9%	0.3%	7.4%	\$1.67	\$3.65
Todd County	105	142	0.8%	0.3%	4.0%	\$2.00	\$3.31
Region Total	13,455	18,605		34.0%		\$324.03	\$527.42
State Total	37,644	54,723			9.1%	\$851.55	\$1,598.98

Glacial Lakes & Prairies

- \$591 million – 14.9% 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 \$43 million in state and local tax revenue is collected from visitor activity in this region.
- Nearly two-thirds of visitor spending in the region is concentrated in three counties: Brookings, Brown and Codington.
- 9,223 jobs are supported by visitor spending in the region – 7.5 times the population of Britton.

Glacial Lakes & Prairies spending timeline

Glacial Lakes & Prairies Region								
County	(Millions)					Percent Change (2018/2017)	Share of Region	Share of State
	2014	2015	2016	2017	2018			
Beadle County	\$50.07	\$47.32	\$43.59	\$41.27	\$42.10	2.0%	7.12%	1.06%
Brookings County	\$91.84	\$90.51	\$100.49	\$103.40	\$99.06	-4.2%	16.75%	2.49%
Brown County	\$192.31	\$177.51	\$179.97	\$178.70	\$183.41	2.6%	31.01%	4.61%
Clark County	\$4.67	\$4.59	\$5.10	\$5.25	\$5.07	-3.4%	0.86%	0.13%
Codington County	\$98.32	\$96.92	\$89.60	\$92.87	\$96.91	4.4%	16.39%	2.43%
Day County	\$15.03	\$17.73	\$21.07	\$20.58	\$20.75	0.9%	3.51%	0.52%
Deuel County	\$11.63	\$10.67	\$9.76	\$9.59	\$9.89	3.2%	1.67%	0.25%
Edmunds County	\$11.68	\$11.10	\$10.37	\$10.21	\$10.58	3.6%	1.79%	0.27%
Faulk County	\$5.61	\$4.98	\$4.89	\$5.08	\$4.67	-8.0%	0.79%	0.12%
Grant County	\$22.42	\$23.17	\$20.23	\$20.43	\$20.22	-1.0%	3.42%	0.51%
Hamlin County	\$12.42	\$13.61	\$11.13	\$11.20	\$12.04	7.5%	2.04%	0.30%
Hand County	\$6.14	\$6.18	\$5.93	\$5.63	\$6.02	6.9%	1.02%	0.15%
Jerauld County	\$3.22	\$2.99	\$2.77	\$2.53	\$2.73	7.9%	0.46%	0.07%
Kingsbury County	\$9.90	\$10.30	\$9.91	\$9.62	\$9.93	3.3%	1.68%	0.25%
McPherson County	\$4.55	\$4.33	\$4.70	\$4.84	\$4.70	-2.9%	0.79%	0.12%
Marshall County	\$7.55	\$7.44	\$7.71	\$7.47	\$8.22	10.0%	1.39%	0.21%
Moody County	\$11.77	\$10.77	\$11.00	\$11.26	\$11.51	2.3%	1.95%	0.29%
Roberts County	\$29.32	\$28.74	\$27.28	\$28.24	\$28.43	0.7%	4.81%	0.71%
Sanborn County	\$2.75	\$2.31	\$2.28	\$2.12	\$2.01	-5.2%	0.34%	0.05%
Spink County	\$13.55	\$12.41	\$13.39	\$12.98	\$13.10	0.9%	2.21%	0.33%
Region Total	\$604.75	\$583.57	\$581.19	\$583.25	\$591.35	1.4%	100%	14.86%
State Total	\$3,707.57	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	2.5%		100%

Glacial Lakes & Prairies spending, 2018

Glacial Lakes & Prairies Region

County	Visitor Spending - 2018 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Beadle County	\$5.78	\$8.46	\$6.13	\$8.38	\$13.35	\$42.10	2.0%	\$3.43
Brookings County	\$16.08	\$28.52	\$11.48	\$16.77	\$26.21	\$99.06	-4.2%	\$7.76
Brown County	\$27.43	\$33.92	\$20.88	\$63.16	\$38.02	\$183.41	2.6%	\$12.76
Clark County	\$0.41	\$0.82	\$0.44	\$1.56	\$1.84	\$5.07	-3.4%	\$0.48
Codington County	\$16.10	\$22.18	\$12.72	\$18.18	\$27.74	\$96.91	4.4%	\$7.10
Day County	\$4.33	\$5.56	\$2.12	\$4.61	\$4.13	\$20.75	0.9%	\$1.45
Deuel County	\$1.56	\$1.88	\$0.87	\$2.42	\$3.16	\$9.89	3.2%	\$0.78
Edmunds County	\$0.90	\$1.42	\$0.45	\$1.81	\$6.00	\$10.58	3.6%	\$0.74
Faulk County	\$0.64	\$0.92	\$0.39	\$0.57	\$2.13	\$4.67	-8.0%	\$0.33
Grant County	\$1.79	\$3.30	\$1.54	\$9.52	\$4.08	\$20.22	-1.0%	\$1.55
Hamlin County	\$1.30	\$1.88	\$0.54	\$3.45	\$4.87	\$12.04	7.5%	\$0.80
Hand County	\$0.85	\$1.46	\$0.76	\$1.48	\$1.48	\$6.02	6.9%	\$0.58
Jerauld County	\$0.22	\$0.49	\$0.39	\$0.69	\$0.95	\$2.73	7.9%	\$0.31
Kingsbury County	\$1.70	\$2.32	\$1.35	\$1.90	\$2.66	\$9.93	3.3%	\$0.84
McPherson County	\$0.65	\$0.84	\$0.31	\$1.40	\$1.50	\$4.70	-2.9%	\$0.47
Marshall County	\$1.88	\$2.75	\$0.53	\$0.86	\$2.20	\$8.22	10.0%	\$0.56
Moody County	\$4.55	\$1.79	\$0.58	\$0.85	\$3.75	\$11.51	2.3%	\$0.93
Roberts County	\$5.81	\$6.38	\$1.36	\$5.87	\$9.01	\$28.43	0.7%	\$1.84
Sanborn County	\$0.27	\$0.49	\$0.09	\$0.52	\$0.62	\$2.01	-5.2%	\$0.24
Spink County	\$1.82	\$2.73	\$1.03	\$2.79	\$4.73	\$13.10	0.9%	\$1.09
Region Total	\$94.08	\$128.12	\$63.96	\$146.77	\$158.42	\$591.35	1.4%	\$44.05
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$920.28	\$3,980.23	2.5%	\$298.29

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Glacial Lakes & Prairies spending, 2017

Glacial Lakes & Prairies Region								
County	Visitor Spending - 2017 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Beadle County	\$5.39	\$7.97	\$5.80	\$8.76	\$13.35	\$41.27	-5.3%	\$3.35
Brookings County	\$16.97	\$29.39	\$12.26	\$18.13	\$26.66	\$103.40	2.9%	\$7.57
Brown County	\$26.88	\$33.26	\$20.78	\$61.61	\$36.17	\$178.70	-0.7%	\$12.45
Clark County	\$0.46	\$0.87	\$0.47	\$1.60	\$1.84	\$5.25	2.9%	\$0.47
Codington County	\$15.41	\$21.46	\$12.40	\$17.80	\$25.80	\$92.87	3.6%	\$6.93
Day County	\$4.21	\$5.50	\$2.17	\$4.78	\$3.92	\$20.58	-2.3%	\$1.42
Deuel County	\$1.56	\$1.80	\$0.88	\$2.35	\$2.99	\$9.59	-1.7%	\$0.76
Edmunds County	\$0.95	\$1.33	\$0.45	\$1.80	\$5.68	\$10.21	-1.6%	\$0.73
Faulk County	\$0.72	\$1.00	\$0.47	\$0.66	\$2.23	\$5.08	3.8%	\$0.32
Grant County	\$1.79	\$3.41	\$1.59	\$9.68	\$3.98	\$20.43	1.0%	\$1.52
Hamlin County	\$1.25	\$1.82	\$0.50	\$3.21	\$4.42	\$11.20	0.6%	\$0.79
Hand County	\$0.76	\$1.40	\$0.74	\$1.44	\$1.30	\$5.63	-5.0%	\$0.57
Jerauld County	\$0.22	\$0.46	\$0.36	\$0.62	\$0.88	\$2.53	-8.6%	\$0.30
Kingsbury County	\$1.63	\$2.19	\$1.27	\$1.99	\$2.53	\$9.62	-3.0%	\$0.82
McPherson County	\$0.64	\$0.86	\$0.32	\$1.50	\$1.52	\$4.84	2.9%	\$0.47
Marshall County	\$1.78	\$2.53	\$0.41	\$0.83	\$1.91	\$7.47	-3.2%	\$0.55
Moody County	\$4.44	\$1.78	\$0.58	\$0.86	\$3.60	\$11.26	2.3%	\$0.91
Roberts County	\$5.74	\$6.47	\$1.38	\$5.85	\$8.81	\$28.24	3.5%	\$1.80
Sanborn County	\$0.28	\$0.53	\$0.10	\$0.55	\$0.65	\$2.12	-7.3%	\$0.24
Spink County	\$1.80	\$2.61	\$1.03	\$2.88	\$4.66	\$12.98	-3.1%	\$1.07
Region Total	\$92.89	\$126.64	\$63.94	\$146.89	\$152.89	\$583.25	0.4%	\$43.04
State Total	\$722.46	\$868.72	\$595.86	\$826.52	\$869.60	\$3,883.16	1.2%	\$290.95

* 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	483	754	8.1%	1.4%	6.4%	\$10.55	\$21.31
Brookings County	1,463	2,013	21.6%	3.7%	8.1%	\$26.61	\$44.83
Brown County	1,878	2,682	28.7%	4.9%	9.1%	\$40.45	\$75.25
Clark County	27	45	0.5%	0.1%	2.1%	\$0.55	\$1.14
Codington County	991	1,514	16.2%	2.8%	7.1%	\$18.65	\$38.46
Day County	311	395	4.2%	0.7%	11.3%	\$5.09	\$7.97
Deuel County	64	95	1.0%	0.2%	3.4%	\$1.13	\$2.58
Edmunds County	61	94	1.0%	0.2%	3.8%	\$1.59	\$3.07
Faulk County	36	56	0.6%	0.1%	4.2%	\$0.55	\$1.33
Grant County	188	305	3.3%	0.6%	5.3%	\$3.31	\$7.95
Hamlin County	75	113	1.2%	0.2%	3.5%	\$1.92	\$3.52
Hand County	88	138	1.5%	0.3%	5.6%	\$1.14	\$2.96
Jerauld County	21	37	0.4%	0.1%	1.9%	\$0.41	\$1.15
Kingsbury County	128	181	1.9%	0.3%	5.5%	\$1.98	\$3.99
McPherson County	41	63	0.7%	0.1%	4.7%	\$0.73	\$1.52
Marshall County	78	101	1.1%	0.2%	3.7%	\$1.20	\$1.98
Moody County	106	157	1.7%	0.3%	4.6%	\$1.62	\$3.60
Roberts County	272	361	3.9%	0.7%	6.4%	\$3.97	\$6.87
Sanborn County	19	36	0.4%	0.1%	2.6%	\$0.28	\$0.91
Spink County	132	198	2.1%	0.4%	4.8%	\$2.34	\$4.90
Region Total	5,981	9,337		17.1%		\$124.08	\$235.29
State Total	37,644	54,723			9.1%	\$851.55	\$1,598.98

Missouri River

- \$306 million – 7.7% of the visitor spending in South Dakota - occurs in the Missouri River region.
- Visitors to the region spent \$66.0 million at lodging establishments in 2018.
- Counties closer to Pierre – Hyde, Stanley and Sully – grew faster than in other areas of the region.
- 4,227 jobs are supported by tourism activity in the region.
- Tourism's employment concentration is highest in Buffalo, Lyman, Potter and Walworth – and higher in those counties than that of the state.

Missouri River visitor spending timeline

Missouri River Region

County	(Millions)					Percent Change (2018/2017)	Share of Region	Share of State
	2014	2015	2016	2017	2018			
Aurora County	\$6.28	\$5.94	\$5.83	\$6.11	\$6.30	3.1%	2.06%	0.16%
Brule County	\$26.38	\$27.86	\$27.55	\$25.98	\$27.09	4.3%	8.85%	0.68%
Buffalo County	\$6.03	\$5.63	\$5.71	\$5.84	\$5.98	2.3%	1.95%	0.15%
Campbell County	\$2.80	\$2.80	\$2.95	\$3.08	\$2.95	-4.1%	0.96%	0.07%
Charles Mix County	\$27.50	\$26.67	\$24.86	\$24.30	\$25.32	4.2%	8.28%	0.64%
Corson County	\$2.94	\$2.75	\$2.47	\$2.55	\$2.45	-4.0%	0.80%	0.06%
Dewey County	\$11.29	\$10.45	\$9.56	\$9.85	\$9.35	-5.0%	3.06%	0.23%
Gregory County	\$11.35	\$11.47	\$11.63	\$11.71	\$11.76	0.4%	3.84%	0.30%
Hughes County	\$86.45	\$80.37	\$76.73	\$76.77	\$78.46	2.2%	25.64%	1.97%
Hyde County	\$1.99	\$1.91	\$1.81	\$1.68	\$1.76	4.3%	0.57%	0.04%
Lyman County	\$36.37	\$37.89	\$39.11	\$37.67	\$38.19	1.4%	12.48%	0.96%
Potter County	\$18.36	\$16.29	\$15.87	\$15.07	\$14.34	-4.8%	4.69%	0.36%
Stanley County	\$20.20	\$21.74	\$21.48	\$21.73	\$22.61	4.1%	7.39%	0.57%
Sully County	\$8.77	\$8.84	\$8.17	\$8.88	\$10.29	15.8%	3.36%	0.26%
Tripp County	\$20.51	\$21.31	\$22.50	\$21.56	\$21.96	1.8%	7.18%	0.55%
Walworth County	\$27.19	\$27.94	\$26.06	\$26.76	\$26.52	-0.9%	8.67%	0.67%
Ziebach County	\$0.70	\$0.67	\$0.62	\$0.61	\$0.63	3.5%	0.21%	0.02%
Region Total	\$315.12	\$310.53	\$302.92	\$300.13	\$305.95	1.9%	100%	7.69%
State Total	\$3,707.57	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	2.5%		100%

Missouri River visitor spending, 2018

Missouri River Region								
County	Visitor Spending - 2018 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Aurora County	\$0.52	\$0.86	\$0.57	\$0.42	\$3.93	\$6.30	3.1%	\$0.55
Brule County	\$4.89	\$7.23	\$3.21	\$6.16	\$5.60	\$27.09	4.3%	\$1.97
Buffalo County	\$2.47	\$0.88	\$0.63	\$0.94	\$1.06	\$5.98	2.3%	\$0.36
Campbell County	\$0.66	\$0.95	\$0.05	\$0.64	\$0.65	\$2.95	-4.1%	\$0.24
Charles Mix County	\$7.88	\$3.99	\$3.38	\$3.85	\$6.22	\$25.32	4.2%	\$1.66
Corson County	\$0.21	\$0.69	\$0.05	\$0.20	\$1.29	\$2.45	-4.0%	\$0.20
Dewey County	\$0.91	\$1.56	\$0.73	\$2.03	\$4.13	\$9.35	-5.0%	\$0.60
Gregory County	\$1.83	\$3.00	\$2.39	\$1.75	\$2.79	\$11.76	0.4%	\$1.01
Hughes County	\$16.05	\$18.33	\$12.26	\$14.66	\$17.15	\$78.46	2.2%	\$6.49
Hyde County	\$0.20	\$0.23	\$0.23	\$0.72	\$0.39	\$1.76	4.3%	\$0.22
Lyman County	\$9.59	\$4.37	\$6.40	\$8.57	\$9.27	\$38.19	1.4%	\$2.68
Potter County	\$4.37	\$2.20	\$1.23	\$2.98	\$3.57	\$14.34	-4.8%	\$1.10
Stanley County	\$5.34	\$5.28	\$3.40	\$4.47	\$4.12	\$22.61	4.1%	\$1.56
Sully County	\$0.45	\$2.85	\$5.43	\$0.76	\$0.80	\$10.29	15.8%	\$0.67
Tripp County	\$3.45	\$4.40	\$2.38	\$7.33	\$4.39	\$21.96	1.8%	\$1.63
Walworth County	\$7.18	\$5.87	\$2.38	\$5.17	\$5.91	\$26.52	-0.9%	\$1.90
Ziebach County	\$0.02	\$0.33	\$0.01	\$0.13	\$0.14	\$0.63	3.5%	\$0.07
Region Total	\$66.01	\$63.03	\$44.74	\$60.78	\$71.39	\$305.95	1.9%	\$22.90
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$920.28	\$3,980.23	2.5%	\$298.29

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Missouri River visitor spending, 2017

Missouri River Region								
County	Visitor Spending - 2017 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Aurora County	\$0.51	\$0.83	\$0.54	\$0.43	\$3.80	\$6.11	4.8%	\$0.53
Brule County	\$4.62	\$6.92	\$3.12	\$6.00	\$5.32	\$25.98	-5.7%	\$1.92
Buffalo County	\$2.41	\$0.87	\$0.63	\$0.93	\$1.01	\$5.84	2.3%	\$0.35
Campbell County	\$0.65	\$1.02	\$0.05	\$0.68	\$0.67	\$3.08	4.3%	\$0.24
Charles Mix County	\$7.64	\$3.73	\$3.29	\$3.76	\$5.87	\$24.30	-2.3%	\$1.61
Corson County	\$0.23	\$0.78	\$0.06	\$0.21	\$1.28	\$2.55	3.2%	\$0.20
Dewey County	\$1.16	\$1.72	\$0.85	\$2.15	\$3.97	\$9.85	3.0%	\$0.58
Gregory County	\$1.80	\$2.98	\$2.42	\$1.78	\$2.71	\$11.71	0.6%	\$0.99
Hughes County	\$15.52	\$17.96	\$12.12	\$14.95	\$16.22	\$76.77	0.0%	\$6.33
Hyde County	\$0.19	\$0.20	\$0.22	\$0.70	\$0.37	\$1.68	-7.1%	\$0.21
Lyman County	\$9.47	\$4.34	\$6.52	\$8.60	\$8.74	\$37.67	-3.7%	\$2.61
Potter County	\$4.77	\$2.21	\$1.29	\$3.07	\$3.72	\$15.07	-5.1%	\$1.08
Stanley County	\$5.08	\$5.16	\$3.36	\$4.31	\$3.82	\$21.73	1.2%	\$1.52
Sully County	\$0.40	\$2.46	\$4.71	\$0.62	\$0.70	\$8.88	8.7%	\$0.65
Tripp County	\$3.40	\$4.33	\$2.37	\$7.22	\$4.25	\$21.56	-4.2%	\$1.59
Walworth County	\$7.32	\$6.00	\$2.52	\$5.10	\$5.81	\$26.76	2.7%	\$1.85
Ziebach County	\$0.04	\$0.29	\$0.01	\$0.14	\$0.13	\$0.61	-1.2%	\$0.07
Region Total	\$65.20	\$61.83	\$44.07	\$60.63	\$68.40	\$300.13	-0.9%	\$22.33
State Total	\$722.46	\$868.72	\$595.86	\$826.52	\$869.60	\$3,883.16	1.2%	\$290.95

* 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	43	84	2.0%	0.2%	5.0%	\$0.86	\$2.40
Brule County	245	319	7.5%	0.6%	9.3%	\$4.65	\$7.20
Buffalo County	65	81	1.9%	0.1%	11.8%	\$1.29	\$1.94
Campbell County	16	25	0.6%	0.0%	2.7%	\$0.30	\$0.61
Charles Mix County	283	400	9.5%	0.7%	7.2%	\$4.84	\$8.77
Corson County	15	24	0.6%	0.0%	1.6%	\$0.28	\$0.71
Dewey County	62	107	2.5%	0.2%	3.6%	\$1.31	\$2.85
Gregory County	132	176	4.2%	0.3%	6.2%	\$2.25	\$3.73
Hughes County	910	1,308	31.0%	2.4%	9.1%	\$19.43	\$36.07
Hyde County	17	33	0.8%	0.1%	3.4%	\$0.36	\$1.10
Lyman County	377	530	12.5%	1.0%	22.2%	\$8.68	\$12.77
Potter County	118	191	4.5%	0.3%	11.4%	\$2.42	\$5.15
Stanley County	164	209	4.9%	0.4%	9.7%	\$3.15	\$4.52
Sully County	70	86	2.0%	0.2%	7.7%	\$2.36	\$3.03
Tripp County	196	285	6.7%	0.5%	7.4%	\$4.00	\$7.14
Walworth County	243	357	8.5%	0.7%	10.5%	\$4.76	\$8.95
Ziebach County	7	11	0.3%	0.0%	1.6%	\$0.12	\$0.26
Region Total	2,920	4,227		7.7%		\$61.06	\$107.20
State Total	37,644	54,723			9.1%	\$851.55	\$1,598.98

Southeast

- The Southeast region, measured by visitor spending, ranks 2nd among the four regions of the state.
- Visitor spending surpassed \$1.5 billion in the region in 2018 - 38% of the visitor spending in South Dakota.
- 73% of the region's spending is spent in Minnehaha County; Minnehaha County captures 28% of all visitor spending state-wide.
- Border counties on the southern border grew faster than overall state visitor spending growth – Union, Clay, Yankton and Bon Homme.
- With higher wages paid in the region, more than 45% of the state's tourism-generated labor income goes to employees in the Southeast region.

Southeast spending timeline

Southeast Region								
County	(Millions)					Percent Change (2018/2017)	Share of Region	Share of State
	2014	2015	2016	2017	2018			
Bon Homme County	\$6.09	\$5.73	\$5.37	\$5.00	\$5.19	3.8%	0.34%	0.13%
Clay County	\$27.28	\$28.32	\$26.43	\$27.36	\$28.38	3.7%	1.86%	0.71%
Davison County	\$108.48	\$106.01	\$106.77	\$103.32	\$103.72	0.4%	6.81%	2.61%
Douglas County	\$3.36	\$3.47	\$3.00	\$3.03	\$3.15	3.9%	0.21%	0.08%
Hanson County	\$2.81	\$2.83	\$3.04	\$2.84	\$3.56	25.4%	0.23%	0.09%
Hutchinson County	\$9.42	\$9.36	\$8.82	\$9.27	\$9.58	3.3%	0.63%	0.24%
Lake County	\$24.53	\$23.88	\$24.25	\$25.49	\$25.36	-0.5%	1.67%	0.64%
Lincoln County	\$52.14	\$68.85	\$88.04	\$93.20	\$85.96	-7.8%	5.65%	2.16%
McCook County	\$10.37	\$10.32	\$9.70	\$9.77	\$9.32	-4.6%	0.61%	0.23%
Miner County	\$4.67	\$5.23	\$4.98	\$5.03	\$5.32	5.7%	0.35%	0.13%
Minnehaha County	\$959.27	\$997.96	\$1,052.77	\$1,060.72	\$1,113.97	5.0%	73.16%	27.99%
Turner County	\$7.49	\$7.17	\$6.56	\$6.61	\$6.43	-2.7%	0.42%	0.16%
Union County	\$47.62	\$49.10	\$49.60	\$46.63	\$48.58	4.2%	3.19%	1.22%
Yankton County	\$67.36	\$70.61	\$70.67	\$71.81	\$74.15	3.3%	4.87%	1.86%
Region Total	\$1,330.90	\$1,388.84	\$1,460.01	\$1,470.08	\$1,522.67	3.6%	100%	38.26%
State Total	\$3,707.57	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	2.5%		100%

Southeast visitor spending, 2018

Southeast Region								
County	Visitor Spending - 2018 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bon Homme County	\$0.38	\$1.69	\$0.39	\$0.37	\$2.35	\$5.19	3.8%	\$0.50
Clay County	\$3.67	\$8.46	\$2.22	\$3.33	\$10.70	\$28.38	3.7%	\$2.13
Davison County	\$17.72	\$22.59	\$16.14	\$20.09	\$27.19	\$103.72	0.4%	\$7.73
Douglas County	\$0.24	\$0.65	\$0.13	\$0.80	\$1.32	\$3.15	3.9%	\$0.32
Hanson County	\$0.70	\$0.71	\$0.42	\$0.66	\$1.08	\$3.56	25.4%	\$0.34
Hutchinson County	\$0.90	\$1.75	\$0.80	\$1.99	\$4.15	\$9.58	3.3%	\$0.91
Lake County	\$2.81	\$7.94	\$4.20	\$4.36	\$6.05	\$25.36	-0.5%	\$1.93
Lincoln County	\$7.62	\$20.69	\$18.54	\$12.06	\$27.06	\$85.96	-7.8%	\$8.73
McCook County	\$1.27	\$1.56	\$0.80	\$3.22	\$2.46	\$9.32	-4.6%	\$0.78
Miner County	\$0.89	\$1.07	\$0.56	\$1.60	\$1.20	\$5.32	5.7%	\$0.42
Minnehaha County	\$133.15	\$242.79	\$145.17	\$283.68	\$309.18	\$1,113.97	5.0%	\$78.79
Turner County	\$0.69	\$1.13	\$0.66	\$1.30	\$2.64	\$6.43	-2.7%	\$0.76
Union County	\$6.05	\$11.55	\$11.57	\$8.68	\$10.72	\$48.58	4.2%	\$4.30
Yankton County	\$9.77	\$21.83	\$10.24	\$16.17	\$16.13	\$74.15	3.3%	\$4.95
Region Total	\$185.87	\$344.43	\$211.83	\$358.31	\$422.22	\$1,522.67	3.6%	\$112.60
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$920.28	\$3,980.23	2.5%	\$298.29

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

Southeast visitor spending, 2017

Southeast Region								
County	Visitor Spending - 2017 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bon Homme County	\$0.37	\$1.68	\$0.38	\$0.38	\$2.18	\$5.00	-6.9%	\$0.49
Clay County	\$3.62	\$8.24	\$2.23	\$3.33	\$9.94	\$27.36	3.5%	\$2.08
Davison County	\$18.16	\$23.10	\$16.72	\$20.79	\$24.55	\$103.32	-3.2%	\$7.54
Douglas County	\$0.24	\$0.62	\$0.13	\$0.80	\$1.24	\$3.03	0.8%	\$0.32
Hanson County	\$0.52	\$0.57	\$0.32	\$0.52	\$0.91	\$2.84	-6.6%	\$0.33
Hutchinson County	\$0.90	\$1.67	\$0.76	\$2.04	\$3.90	\$9.27	5.2%	\$0.90
Lake County	\$2.93	\$8.06	\$4.33	\$4.47	\$5.70	\$25.49	5.1%	\$1.89
Lincoln County	\$8.96	\$22.91	\$20.78	\$14.02	\$26.54	\$93.20	5.9%	\$8.56
McCook County	\$1.38	\$1.69	\$0.90	\$3.39	\$2.40	\$9.77	0.7%	\$0.77
Miner County	\$0.80	\$1.04	\$0.51	\$1.58	\$1.10	\$5.03	1.0%	\$0.41
Minnehaha County	\$126.23	\$234.14	\$141.38	\$271.55	\$287.42	\$1,060.72	0.8%	\$76.86
Turner County	\$0.71	\$1.20	\$0.68	\$1.40	\$2.61	\$6.61	0.7%	\$0.75
Union County	\$5.50	\$11.20	\$11.53	\$8.40	\$9.99	\$46.63	-6.0%	\$4.21
Yankton County	\$9.35	\$21.40	\$10.09	\$15.88	\$15.10	\$71.81	1.6%	\$4.82
Region Total	\$179.66	\$337.54	\$210.74	\$348.55	\$393.59	\$1,470.08	0.7%	\$109.95
State Total	\$722.46	\$868.72	\$595.86	\$826.52	\$869.60	\$3,883.16	1.2%	\$290.95

* 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	64	104	0.5%	0.2%	3.1%	\$1.04	\$2.44
Clay County	359	546	2.4%	1.0%	6.2%	\$5.85	\$11.34
Davison County	1,206	1,691	7.5%	3.1%	10.3%	\$24.91	\$44.26
Douglas County	19	42	0.2%	0.1%	1.9%	\$0.26	\$1.13
Hanson County	31	49	0.2%	0.1%	3.1%	\$0.61	\$1.39
Hutchinson County	76	148	0.7%	0.3%	3.2%	\$1.19	\$4.01
Lake County	321	434	1.9%	0.8%	5.6%	\$5.19	\$9.82
Lincoln County	591	1,286	5.7%	2.4%	4.1%	\$12.09	\$49.89
McCook County	68	106	0.5%	0.2%	3.5%	\$1.04	\$2.53
Miner County	46	69	0.3%	0.1%	4.3%	\$0.68	\$1.49
Minnehaha County	10,523	15,883	70.4%	29.0%	10.0%	\$262.66	\$535.62
Turner County	64	137	0.6%	0.3%	3.2%	\$0.93	\$3.74
Union County	503	801	3.6%	1.5%	6.0%	\$10.24	\$28.56
Yankton County	838	1,258	5.6%	2.3%	7.5%	\$15.68	\$32.87
Region Total	14,646	22,553		41.2%		\$342.37	\$729.07
State Total	37,644	54,723			9.1%	\$851.55	\$1,598.98

Methodology and Background



TOURISM
ECONOMICS

AN OXFORD ECONOMICS COMPANY

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: NTTU, 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.



TOURISM ECONOMICS

AN OXFORD ECONOMICS COMPANY

For more information:

Adam Sacks, President

adam@tourismeconomics.com

Christopher Pike, Director

cpike@tourismeconomics.com