



The Economic Impact of Tourism in South Dakota

County Analysis Calendar Year 2019



Counties



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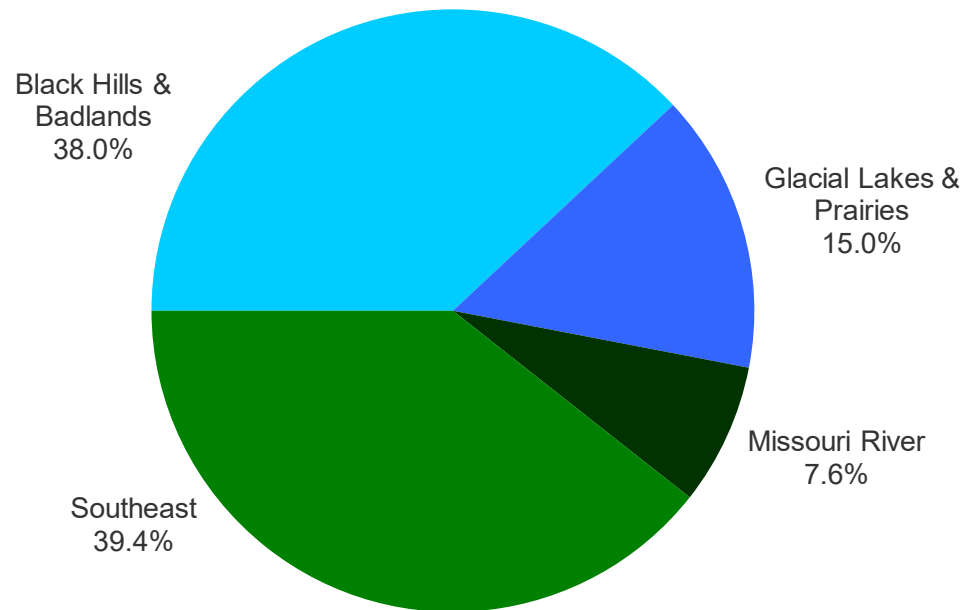
Regions

- 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 two largest, each capturing around 38-39% of state-wide visitor spending.
- Growth was strongest in the Southeast Region, increasing 5.9% in 2019.

Regions

South Dakota Visitor Spending (by region)						
	2015	2016	2017	2018	2019	% Chnge
Black Hills & Badlands	\$1,498.96	\$1,491.71	\$1,529.70	\$1,560.25	\$1,557.87	-0.2%
Glacial Lakes & Prairies	\$582.93	\$581.19	\$583.25	\$591.35	\$614.08	3.8%
Missouri River	\$310.69	\$302.92	\$300.13	\$305.95	\$310.73	1.6%
Southeast	\$1,387.70	\$1,460.01	\$1,470.08	\$1,522.67	\$1,612.24	5.9%
Grand Total	\$3,780.28	\$3,835.83	\$3,883.16	\$3,980.23	\$4,094.92	2.9%

Tourism Industry Sales By Region
2019



Black Hills & Badlands

- Black Hills & Badlands is the 2nd largest region of the state, measured by visitor spending, with 38% of all visitor sales.
- Visitor spending in the region fell slightly as visitor numbers to key attractions fell.
- 80% of the region's spending occurs in Lawrence and Pennington Counties with Pennington representing 19.3% of all visitor spending in the state.
- More than 18,700 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 (2019/2018)	Share of Region	Share of State
	2015	2016	2017	2018	2019			
Bennett County	\$4.65	\$4.74	\$4.97	\$4.77	\$4.86	2.0%	0.31%	0.12%
Butte County	\$22.96	\$20.85	\$21.07	\$21.56	\$22.56	4.6%	1.45%	0.55%
Custer County	\$102.19	\$109.74	\$114.65	\$109.78	\$110.33	0.5%	7.08%	2.69%
Fall River County	\$32.76	\$37.83	\$35.67	\$35.29	\$35.34	0.1%	2.27%	0.86%
Haakon County	\$5.49	\$4.96	\$5.04	\$5.43	\$5.65	3.9%	0.36%	0.14%
Harding County	\$2.70	\$2.47	\$2.24	\$2.85	\$2.95	3.3%	0.19%	0.07%
Jackson County	\$23.12	\$24.23	\$23.82	\$25.26	\$24.68	-2.3%	1.58%	0.60%
Jones County	\$16.73	\$16.72	\$16.27	\$16.43	\$16.52	0.5%	1.06%	0.40%
Lawrence County	\$476.56	\$439.79	\$444.39	\$458.62	\$454.94	-0.8%	29.20%	11.11%
Meade County	\$53.25	\$48.09	\$47.01	\$51.60	\$47.56	-7.8%	3.05%	1.16%
Mellette County	\$2.27	\$2.26	\$2.26	\$2.32	\$2.33	0.1%	0.15%	0.06%
Oglala Lakota County	\$21.00	\$20.61	\$21.14	\$21.62	\$21.52	-0.4%	1.38%	0.53%
Pennington County	\$714.49	\$740.69	\$773.78	\$789.48	\$791.22	0.2%	50.79%	19.32%
Perkins County	\$11.95	\$12.20	\$11.15	\$11.43	\$11.40	-0.3%	0.73%	0.28%
Todd County	\$7.22	\$6.54	\$6.23	\$6.43	\$6.01	-6.5%	0.39%	0.15%
Region Total	\$1,497.34	\$1,491.71	\$1,529.70	\$1,562.88	\$1,557.87	-0.3%	100%	38.04%
State Total	\$3,780.28	\$3,835.83	\$3,883.16	\$3,981.61	\$4,094.92	2.8%		100%

Black Hills & Badlands visitor spending, 2019

Black Hills & Badlands Region								
County	Visitor Spending - 2019 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bennett County	\$0.77	\$1.08	\$0.59	\$1.19	\$1.23	\$4.86	2.0%	\$0.35
Butte County	\$4.07	\$5.09	\$2.22	\$3.67	\$7.51	\$22.56	4.6%	\$1.69
Custer County	\$34.09	\$17.67	\$20.11	\$17.46	\$21.01	\$110.33	0.5%	\$8.55
Fall River County	\$7.96	\$8.20	\$5.10	\$6.14	\$7.94	\$35.34	0.1%	\$2.50
Haakon County	\$0.54	\$0.76	\$0.40	\$2.17	\$1.78	\$5.65	3.9%	\$0.43
Harding County	\$0.58	\$0.80	\$0.28	\$0.43	\$0.85	\$2.95	3.3%	\$0.24
Jackson County	\$6.15	\$3.20	\$3.83	\$5.00	\$6.50	\$24.68	-2.3%	\$1.73
Jones County	\$3.63	\$3.19	\$2.21	\$2.78	\$4.71	\$16.52	0.5%	\$1.12
Lawrence County	\$146.37	\$96.55	\$101.50	\$62.66	\$47.86	\$454.94	-0.8%	\$30.32
Meade County	\$9.13	\$12.75	\$4.77	\$7.72	\$13.19	\$47.56	-7.8%	\$5.58
Mellette County	\$0.36	\$0.44	\$0.22	\$0.34	\$0.97	\$2.33	0.1%	\$0.17
Oglala Lakota County	\$5.06	\$6.26	\$1.64	\$2.49	\$6.08	\$21.52	-0.4%	\$1.16
Pennington County	\$174.17	\$190.65	\$123.70	\$154.53	\$148.17	\$791.22	0.2%	\$60.50
Perkins County	\$1.81	\$2.59	\$1.35	\$3.28	\$2.36	\$11.40	-0.3%	\$0.75
Todd County	\$0.94	\$0.87	\$0.41	\$0.63	\$3.16	\$6.01	-6.5%	\$0.40
Region Total	\$395.63	\$350.11	\$268.35	\$270.48	\$273.29	\$1,557.87	1.8%	\$115.48
State Total	\$769.39	\$916.76	\$604.92	\$862.95	\$940.90	\$4,094.92	2.8%	\$307.65

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

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	\$1.21	\$4.77	-4.0%	\$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	\$21.06	\$109.78	-4.2%	\$9.04
Fall River County	\$7.82	\$8.19	\$5.20	\$6.15	\$7.92	\$35.29	-1.1%	\$2.57
Haakon County	\$0.52	\$0.73	\$0.41	\$2.04	\$1.73	\$5.43	7.7%	\$0.40
Harding County	\$0.54	\$0.77	\$0.27	\$0.41	\$0.85	\$2.85	27.1%	\$0.19
Jackson County	\$6.24	\$3.30	\$4.01	\$5.14	\$6.57	\$25.26	6.0%	\$1.71
Jones County	\$3.55	\$3.15	\$2.27	\$2.75	\$4.71	\$16.43	1.0%	\$1.14
Lawrence County	\$145.64	\$95.89	\$107.25	\$63.07	\$46.77	\$458.62	3.2%	\$30.51
Meade County	\$10.03	\$13.73	\$5.41	\$8.62	\$13.81	\$51.60	9.8%	\$5.74
Mellette County	\$0.34	\$0.41	\$0.24	\$0.34	\$0.99	\$2.32	2.8%	\$0.17
Oglala Lakota County	\$5.02	\$6.18	\$1.73	\$2.58	\$6.11	\$21.62	2.2%	\$1.17
Pennington County	\$172.96	\$190.14	\$125.27	\$154.69	\$146.42	\$789.48	2.0%	\$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	\$3.22	\$6.43	3.3%	\$0.42
Region Total	\$393.62	\$349.49	\$277.10	\$271.80	\$270.87	\$1,562.88	2.2%	\$118.70
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$921.66	\$3,981.61	2.5%	\$298.29

* 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	52	71	0.4%	0.1%	4.9%	\$0.81	\$1.33
Butte County	218	286	1.5%	0.5%	5.4%	\$4.31	\$6.93
Custer County	664	979	5.2%	1.8%	21.4%	\$15.66	\$28.19
Fall River County	407	511	2.7%	0.9%	12.4%	\$8.30	\$11.81
Haakon County	39	64	0.3%	0.1%	3.9%	\$0.61	\$1.59
Harding County	25	34	0.2%	0.1%	3.0%	\$0.53	\$0.88
Jackson County	161	221	1.2%	0.4%	15.3%	\$2.89	\$4.41
Jones County	116	148	0.8%	0.3%	17.6%	\$2.06	\$3.14
Lawrence County	3,946	5,038	26.9%	9.1%	28.6%	\$106.06	\$144.12
Meade County	326	487	2.6%	0.9%	3.7%	\$7.47	\$13.62
Mellette County	25	34	0.2%	0.1%	4.3%	\$0.36	\$0.55
Oglala Lakota County	147	212	1.1%	0.4%	4.4%	\$3.07	\$4.88
Pennington County	7,248	10,325	55.2%	18.7%	12.8%	\$172.41	\$309.78
Perkins County	114	162	0.9%	0.3%	7.7%	\$1.66	\$3.27
Todd County	101	136	0.7%	0.2%	3.7%	\$2.17	\$3.39
Region Total	13,536	18,707		33.9%		\$328.37	\$537.90
State Total	37,871	55,157			9.0%	\$877.63	\$1,655.38

Glacial Lakes & Prairies

- Nearly \$615 million – 15.0% of the visitor spending in South Dakota occurs in the Glacial Lakes & Prairies region.
- Codington County visitor spending surged 8.7% in 2019, surpassing \$105 million.
- More than \$45 million in state and local tax revenue is collected from visitor activity in this region.
- The number of jobs in Codington County supported by visitor spending increased by 85 jobs in 2019.
- 9,369 jobs are supported by visitor spending in the region – which would fill Watertown Stadium nearly twice over.

Glacial Lakes & Prairies spending timeline

Glacial Lakes & Prairies Region								
County	(Millions)					Percent Change (2019/2018)	Share of Region	Share of State
	2015	2016	2017	2018	2019			
Beadle County	\$47.32	\$43.59	\$41.27	\$42.77	\$43.53	1.8%	7.09%	1.06%
Brookings County	\$90.51	\$100.49	\$103.40	\$96.97	\$103.13	6.3%	16.79%	2.52%
Brown County	\$177.51	\$179.97	\$178.70	\$183.80	\$183.67	-0.1%	29.91%	4.49%
Clark County	\$4.59	\$5.10	\$5.25	\$5.06	\$5.07	0.2%	0.83%	0.12%
Codington County	\$96.92	\$89.60	\$92.87	\$96.96	\$105.37	8.7%	17.16%	2.57%
Day County	\$17.73	\$21.07	\$20.58	\$20.76	\$22.13	6.6%	3.60%	0.54%
Deuel County	\$10.67	\$9.76	\$9.59	\$9.88	\$10.30	4.2%	1.68%	0.25%
Edmunds County	\$11.10	\$10.37	\$10.21	\$10.57	\$9.94	-6.0%	1.62%	0.24%
Faulk County	\$4.98	\$4.89	\$5.08	\$4.64	\$4.81	3.6%	0.78%	0.12%
Grant County	\$23.17	\$20.23	\$20.43	\$20.24	\$25.22	24.6%	4.11%	0.62%
Hamlin County	\$13.61	\$11.13	\$11.20	\$12.01	\$11.39	-5.1%	1.86%	0.28%
Hand County	\$6.18	\$5.93	\$5.63	\$5.90	\$5.65	-4.2%	0.92%	0.14%
Jerauld County	\$2.99	\$2.77	\$2.53	\$2.74	\$2.68	-2.2%	0.44%	0.07%
Kingsbury County	\$10.30	\$9.91	\$9.62	\$9.94	\$10.51	5.7%	1.71%	0.26%
McPherson County	\$4.33	\$4.70	\$4.84	\$4.69	\$4.26	-9.1%	0.69%	0.10%
Marshall County	\$7.44	\$7.71	\$7.47	\$8.22	\$8.27	0.6%	1.35%	0.20%
Moody County	\$10.77	\$11.00	\$11.26	\$11.50	\$11.64	1.2%	1.89%	0.28%
Roberts County	\$28.74	\$27.28	\$28.24	\$28.42	\$30.64	7.8%	4.99%	0.75%
Sanborn County	\$2.31	\$2.28	\$2.12	\$2.01	\$1.94	-3.4%	0.32%	0.05%
Spink County	\$12.41	\$13.39	\$12.98	\$13.08	\$13.94	6.6%	2.27%	0.34%
Region Total	\$583.57	\$581.19	\$583.25	\$590.16	\$614.08	4.1%	100%	15.00%
State Total	\$3,780.28	\$3,835.83	\$3,883.16	\$3,981.61	\$4,094.92	2.8%		100%

Glacial Lakes & Prairies spending, 2019

Glacial Lakes & Prairies Region								
County	Visitor Spending - 2019 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Beadle County	\$5.85	\$8.50	\$5.99	\$8.43	\$14.75	\$43.53	1.8%	\$3.54
Brookings County	\$17.47	\$30.19	\$12.28	\$18.15	\$25.04	\$103.13	6.3%	\$7.68
Brown County	\$28.95	\$35.21	\$21.10	\$59.38	\$39.03	\$183.67	-0.1%	\$13.01
Clark County	\$0.41	\$0.84	\$0.44	\$1.56	\$1.82	\$5.07	0.2%	\$0.47
Codington County	\$18.04	\$24.32	\$14.06	\$20.15	\$28.81	\$105.37	8.7%	\$7.81
Day County	\$4.65	\$5.89	\$2.28	\$5.00	\$4.31	\$22.13	6.6%	\$1.52
Deuel County	\$1.62	\$1.95	\$0.87	\$2.55	\$3.31	\$10.30	4.2%	\$0.81
Edmunds County	\$0.86	\$1.37	\$0.42	\$1.64	\$5.65	\$9.94	-6.0%	\$0.72
Faulk County	\$0.64	\$0.96	\$0.38	\$0.60	\$2.24	\$4.81	3.6%	\$0.32
Grant County	\$2.73	\$4.30	\$2.15	\$10.96	\$5.08	\$25.22	24.6%	\$1.85
Hamlin County	\$1.22	\$1.85	\$0.48	\$3.16	\$4.68	\$11.39	-5.1%	\$0.82
Hand County	\$0.79	\$1.40	\$0.70	\$1.46	\$1.30	\$5.65	-4.2%	\$0.60
Jerauld County	\$0.19	\$0.47	\$0.37	\$0.69	\$0.95	\$2.68	-2.2%	\$0.29
Kingsbury County	\$1.83	\$2.44	\$1.39	\$2.11	\$2.74	\$10.51	5.7%	\$0.88
McPherson County	\$0.58	\$0.79	\$0.25	\$1.26	\$1.36	\$4.26	-9.1%	\$0.45
Marshall County	\$1.89	\$2.72	\$0.54	\$0.85	\$2.26	\$8.27	0.6%	\$0.60
Moody County	\$4.74	\$1.77	\$0.59	\$0.85	\$3.68	\$11.64	1.2%	\$0.96
Roberts County	\$6.39	\$6.92	\$1.46	\$6.41	\$9.46	\$30.64	7.8%	\$1.93
Sanborn County	\$0.26	\$0.49	\$0.08	\$0.50	\$0.62	\$1.94	-3.4%	\$0.23
Spink County	\$1.96	\$2.94	\$1.10	\$3.12	\$4.81	\$13.94	6.6%	\$1.14
Region Total	\$101.08	\$135.34	\$66.93	\$148.82	\$161.91	\$614.08	5.3%	\$45.61
State Total	\$769.39	\$916.76	\$604.92	\$862.95	\$940.90	\$4,094.92	2.8%	\$307.65

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

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	\$14.01	\$42.77	3.6%	\$3.43
Brookings County	\$16.08	\$28.52	\$11.48	\$16.77	\$24.12	\$96.97	-6.2%	\$7.76
Brown County	\$27.43	\$33.92	\$20.88	\$63.16	\$38.42	\$183.80	2.9%	\$12.76
Clark County	\$0.41	\$0.82	\$0.44	\$1.56	\$1.83	\$5.06	-3.6%	\$0.48
Codington County	\$16.10	\$22.18	\$12.72	\$18.18	\$27.78	\$96.96	4.4%	\$7.10
Day County	\$4.33	\$5.56	\$2.12	\$4.61	\$4.13	\$20.76	0.9%	\$1.45
Deuel County	\$1.56	\$1.88	\$0.87	\$2.42	\$3.15	\$9.88	3.1%	\$0.78
Edmunds County	\$0.90	\$1.42	\$0.45	\$1.81	\$5.99	\$10.57	3.5%	\$0.74
Faulk County	\$0.64	\$0.92	\$0.39	\$0.57	\$2.11	\$4.64	-8.5%	\$0.33
Grant County	\$1.79	\$3.30	\$1.54	\$9.52	\$4.10	\$20.24	-0.9%	\$1.55
Hamlin County	\$1.30	\$1.88	\$0.54	\$3.45	\$4.84	\$12.01	7.2%	\$0.80
Hand County	\$0.85	\$1.46	\$0.76	\$1.48	\$1.35	\$5.90	4.7%	\$0.58
Jerauld County	\$0.22	\$0.49	\$0.39	\$0.69	\$0.95	\$2.74	8.1%	\$0.31
Kingsbury County	\$1.70	\$2.32	\$1.35	\$1.90	\$2.67	\$9.94	3.4%	\$0.84
McPherson County	\$0.65	\$0.84	\$0.31	\$1.40	\$1.49	\$4.69	-3.2%	\$0.47
Marshall County	\$1.88	\$2.75	\$0.53	\$0.86	\$2.20	\$8.22	10.1%	\$0.56
Moody County	\$4.55	\$1.79	\$0.58	\$0.85	\$3.74	\$11.50	2.2%	\$0.93
Roberts County	\$5.81	\$6.38	\$1.36	\$5.87	\$9.01	\$28.42	0.6%	\$1.84
Sanborn County	\$0.27	\$0.49	\$0.09	\$0.52	\$0.63	\$2.01	-5.1%	\$0.24
Spink County	\$1.82	\$2.73	\$1.03	\$2.79	\$4.71	\$13.08	0.8%	\$1.09
Region Total	\$94.08	\$128.12	\$63.96	\$146.77	\$157.22	\$590.16	1.2%	\$44.05
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$921.66	\$3,981.61	2.5%	\$298.29

* 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	478	742	7.9%	1.3%	6.2%	\$10.94	\$21.97
Brookings County	1,426	1,964	21.0%	3.6%	7.8%	\$27.56	\$46.55
Brown County	1,854	2,648	28.3%	4.8%	9.1%	\$40.38	\$75.54
Clark County	27	44	0.5%	0.1%	2.0%	\$0.55	\$1.18
Codington County	1,048	1,599	17.1%	2.9%	7.4%	\$20.72	\$41.52
Day County	313	399	4.3%	0.7%	11.5%	\$5.16	\$8.04
Deuel County	67	96	1.0%	0.2%	3.5%	\$0.87	\$2.26
Edmunds County	59	89	1.0%	0.2%	3.7%	\$1.35	\$2.72
Faulk County	35	53	0.6%	0.1%	3.8%	\$0.61	\$1.39
Grant County	210	338	3.6%	0.6%	5.9%	\$3.89	\$9.11
Hamlin County	73	112	1.2%	0.2%	3.4%	\$1.70	\$3.36
Hand County	83	131	1.4%	0.2%	5.1%	\$1.08	\$2.85
Jerauld County	20	35	0.4%	0.1%	1.7%	\$0.41	\$1.07
Kingsbury County	137	191	2.0%	0.3%	6.1%	\$2.04	\$4.22
McPherson County	39	59	0.6%	0.1%	4.4%	\$0.71	\$1.38
Marshall County	78	101	1.1%	0.2%	3.7%	\$1.19	\$1.99
Moody County	106	157	1.7%	0.3%	4.3%	\$1.66	\$3.80
Roberts County	282	373	4.0%	0.7%	6.5%	\$4.37	\$7.49
Sanborn County	18	34	0.4%	0.1%	2.6%	\$0.26	\$0.87
Spink County	135	203	2.2%	0.4%	4.9%	\$2.42	\$5.23
Region Total	6,009	9,369		17.0%		\$127.88	\$242.55
State Total	37,871	55,157			9.0%	\$877.63	\$1,655.38

Missouri River

- Visitors spent \$310 million in the Missouri River region, growth of 3.5%.
- The region's visitor spending profile – spending by category – closely matches the state.
- 25% of the region's visitor spending occurs in Hughes County.
- 4,196 jobs are supported by tourism activity in the region.
- Tourism's employment concentration is highest in Buffalo, Lyman, Potter, Stanley and Walworth – and higher than that of the state.

Missouri River visitor spending timeline

Missouri River Region								
County	(Millions)					Percent Change (2019/2018)	Share of Region	Share of State
	2015	2016	2017	2018	2019			
Aurora County	\$5.94	\$5.83	\$6.11	\$6.27	\$6.24	-0.4%	2.01%	0.15%
Brule County	\$27.86	\$27.55	\$25.98	\$27.10	\$28.54	5.3%	9.19%	0.70%
Buffalo County	\$5.63	\$5.71	\$5.84	\$5.99	\$6.18	3.2%	1.99%	0.15%
Campbell County	\$2.80	\$2.95	\$3.08	\$2.94	\$2.96	0.7%	0.95%	0.07%
Charles Mix County	\$26.67	\$24.86	\$24.30	\$25.32	\$25.81	1.9%	8.31%	0.63%
Corson County	\$2.75	\$2.47	\$2.55	\$2.44	\$2.52	3.1%	0.81%	0.06%
Dewey County	\$10.45	\$9.56	\$9.85	\$9.34	\$9.40	0.6%	3.02%	0.23%
Gregory County	\$11.47	\$11.63	\$11.71	\$11.77	\$11.38	-3.3%	3.66%	0.28%
Hughes County	\$80.37	\$76.73	\$76.77	\$78.50	\$77.97	-0.7%	25.09%	1.90%
Hyde County	\$1.91	\$1.81	\$1.68	\$1.76	\$1.96	11.7%	0.63%	0.05%
Lyman County	\$37.89	\$39.11	\$37.67	\$38.22	\$39.02	2.1%	12.56%	0.95%
Potter County	\$16.29	\$15.87	\$15.07	\$14.48	\$13.96	-3.6%	4.49%	0.34%
Stanley County	\$21.74	\$21.48	\$21.73	\$22.64	\$23.28	2.9%	7.49%	0.57%
Sully County	\$8.84	\$8.17	\$8.88	\$10.29	\$10.29	0.0%	3.31%	0.25%
Tripp County	\$21.31	\$22.50	\$21.56	\$21.96	\$23.01	4.8%	7.40%	0.56%
Walworth County	\$27.94	\$26.06	\$26.76	\$26.51	\$27.54	3.9%	8.86%	0.67%
Ziebach County	\$0.67	\$0.62	\$0.61	\$0.63	\$0.65	2.7%	0.21%	0.02%
Region Total	\$310.53	\$302.92	\$300.13	\$306.17	\$310.73	1.5%	100%	7.59%
State Total	\$3,780.28	\$3,835.83	\$3,883.16	\$3,981.61	\$4,094.92	2.8%		100%

Missouri River visitor spending, 2019

Missouri River Region								
County	Visitor Spending - 2019 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Aurora County	\$0.46	\$0.82	\$0.57	\$0.37	\$4.03	\$6.24	-0.4%	\$0.53
Brule County	\$5.37	\$7.56	\$3.34	\$6.43	\$5.84	\$28.54	5.3%	\$2.16
Buffalo County	\$2.58	\$0.91	\$0.64	\$0.97	\$1.09	\$6.18	3.2%	\$0.38
Campbell County	\$0.66	\$0.99	\$0.05	\$0.62	\$0.65	\$2.96	0.7%	\$0.23
Charles Mix County	\$8.14	\$4.08	\$3.49	\$3.88	\$6.22	\$25.81	1.9%	\$1.72
Corson County	\$0.22	\$0.71	\$0.05	\$0.20	\$1.34	\$2.52	3.1%	\$0.19
Dewey County	\$0.94	\$1.61	\$0.72	\$1.94	\$4.19	\$9.40	0.6%	\$0.56
Gregory County	\$1.70	\$2.97	\$2.32	\$1.65	\$2.74	\$11.38	-3.3%	\$1.07
Hughes County	\$16.11	\$18.22	\$11.99	\$14.56	\$17.10	\$77.97	-0.7%	\$6.47
Hyde County	\$0.23	\$0.25	\$0.26	\$0.81	\$0.41	\$1.96	11.7%	\$0.23
Lyman County	\$9.96	\$4.46	\$6.43	\$8.76	\$9.41	\$39.02	2.1%	\$2.62
Potter County	\$4.13	\$2.26	\$1.17	\$2.80	\$3.60	\$13.96	-3.6%	\$1.01
Stanley County	\$5.58	\$5.45	\$3.40	\$4.63	\$4.22	\$23.28	2.9%	\$1.53
Sully County	\$0.45	\$2.90	\$5.35	\$0.77	\$0.82	\$10.29	0.0%	\$0.71
Tripp County	\$3.75	\$4.71	\$2.57	\$7.44	\$4.53	\$23.01	4.8%	\$1.65
Walworth County	\$7.59	\$6.11	\$2.47	\$5.31	\$6.05	\$27.54	3.9%	\$1.84
Ziebach County	\$0.02	\$0.34	\$0.01	\$0.13	\$0.14	\$0.65	2.7%	\$0.08
Region Total	\$67.90	\$64.36	\$44.82	\$61.26	\$72.38	\$310.73	3.5%	\$22.99
State Total	\$769.39	\$916.76	\$604.92	\$862.95	\$940.90	\$4,094.92	2.8%	\$307.65

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

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	\$3.90	\$6.27	2.6%	\$0.55
Brule County	\$4.89	\$7.23	\$3.21	\$6.16	\$5.61	\$27.10	4.3%	\$1.97
Buffalo County	\$2.47	\$0.88	\$0.63	\$0.94	\$1.06	\$5.99	2.4%	\$0.36
Campbell County	\$0.66	\$0.95	\$0.05	\$0.64	\$0.65	\$2.94	-4.3%	\$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	\$1.28	\$2.44	-4.1%	\$0.20
Dewey County	\$0.91	\$1.56	\$0.73	\$2.03	\$4.12	\$9.34	-5.1%	\$0.60
Gregory County	\$1.83	\$3.00	\$2.39	\$1.75	\$2.81	\$11.77	0.6%	\$1.01
Hughes County	\$16.05	\$18.33	\$12.26	\$14.66	\$17.19	\$78.50	2.3%	\$6.49
Hyde County	\$0.20	\$0.23	\$0.23	\$0.72	\$0.39	\$1.76	4.4%	\$0.22
Lyman County	\$9.59	\$4.37	\$6.40	\$8.57	\$9.30	\$38.22	1.5%	\$2.68
Potter County	\$4.37	\$2.20	\$1.23	\$2.98	\$3.70	\$14.48	-3.9%	\$1.10
Stanley County	\$5.34	\$5.28	\$3.40	\$4.47	\$4.14	\$22.64	4.2%	\$1.56
Sully County	\$0.45	\$2.85	\$5.43	\$0.76	\$0.81	\$10.29	15.9%	\$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	\$5.90	\$26.51	-0.9%	\$1.90
Ziebach County	\$0.02	\$0.33	\$0.01	\$0.13	\$0.14	\$0.63	3.7%	\$0.07
Region Total	\$66.01	\$63.03	\$44.74	\$60.78	\$71.61	\$306.17	2.0%	\$22.90
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$921.66	\$3,981.61	2.5%	\$298.29

* 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	83	2.0%	0.2%	4.8%	\$0.76	\$2.26
Brule County	239	317	7.6%	0.6%	9.1%	\$4.80	\$7.65
Buffalo County	64	81	1.9%	0.1%	11.7%	\$1.47	\$2.21
Campbell County	16	24	0.6%	0.0%	2.5%	\$0.32	\$0.59
Charles Mix County	273	390	9.3%	0.7%	6.9%	\$4.93	\$9.07
Corson County	14	23	0.5%	0.0%	1.6%	\$0.30	\$0.70
Dewey County	59	103	2.4%	0.2%	3.4%	\$1.28	\$2.81
Gregory County	130	175	4.2%	0.3%	6.3%	\$2.29	\$3.81
Hughes County	905	1,301	31.0%	2.4%	9.2%	\$19.74	\$36.78
Hyde County	18	34	0.8%	0.1%	3.6%	\$0.39	\$1.20
Lyman County	378	532	12.7%	1.0%	22.5%	\$8.77	\$13.01
Potter County	113	183	4.4%	0.3%	11.4%	\$2.31	\$4.87
Stanley County	159	205	4.9%	0.4%	9.7%	\$3.19	\$4.67
Sully County	75	94	2.2%	0.2%	7.3%	\$2.40	\$3.25
Tripp County	202	292	7.0%	0.5%	7.2%	\$4.21	\$7.71
Walworth County	235	347	8.3%	0.6%	10.3%	\$4.69	\$8.95
Ziebach County	7	11	0.3%	0.0%	1.6%	\$0.13	\$0.31
Region Total	2,887	4,196		7.6%		\$61.97	\$109.85
State Total	37,871	55,157			9.0%	\$877.63	\$1,655.38

Southeast

- The Southeast region overtook the Black Hills region and now captures nearly 40% of all visitor spending in the state, the largest of all regions.
- Visitor spending grew nearly 6% in 2019 to surpass \$1.6 billion.
- Nearly three-quarters of the region's spending is spent in Minnehaha County; Minnehaha County captures more than 29% of all visitor spending state-wide, an increase of 0.8 percentage points.
- With higher wages paid in the region, while 41.5% of all tourism-supported jobs, 46% of the state's tourism-generated labor income goes to employees in the Southeast region.

Southeast spending timeline

Southeast Region								
County	(Millions)					Percent Change (2019/2018)	Share of Region	Share of State
	2015	2016	2017	2018	2019			
Bon Homme County	\$5.73	\$5.37	\$5.00	\$5.19	\$5.54	6.8%	0.34%	0.14%
Clay County	\$28.32	\$26.43	\$27.36	\$28.36	\$27.86	-1.8%	1.73%	0.68%
Davison County	\$106.01	\$106.77	\$103.32	\$100.58	\$104.39	3.8%	6.47%	2.55%
Douglas County	\$3.47	\$3.00	\$3.03	\$3.15	\$3.19	1.4%	0.20%	0.08%
Hanson County	\$2.83	\$3.04	\$2.84	\$3.57	\$3.40	-4.8%	0.21%	0.08%
Hutchinson County	\$9.36	\$8.82	\$9.27	\$9.59	\$9.84	2.6%	0.61%	0.24%
Lake County	\$23.88	\$24.25	\$25.49	\$25.34	\$25.89	2.2%	1.61%	0.63%
Lincoln County	\$68.85	\$88.04	\$93.20	\$86.03	\$92.95	8.0%	5.77%	2.27%
McCook County	\$10.32	\$9.70	\$9.77	\$9.33	\$9.51	1.9%	0.59%	0.23%
Miner County	\$5.23	\$4.98	\$5.03	\$5.33	\$4.85	-8.9%	0.30%	0.12%
Minnehaha County	\$997.96	\$1,052.77	\$1,060.72	\$1,117.51	\$1,195.97	7.0%	74.18%	29.21%
Turner County	\$7.17	\$6.56	\$6.61	\$6.44	\$6.86	6.6%	0.43%	0.17%
Union County	\$49.10	\$49.60	\$46.63	\$48.66	\$46.72	-4.0%	2.90%	1.14%
Yankton County	\$70.61	\$70.67	\$71.81	\$73.32	\$75.28	2.7%	4.67%	1.84%
Region Total	\$1,388.84	\$1,460.01	\$1,470.08	\$1,522.40	\$1,612.24	5.9%	100%	39.37%
State Total	\$3,780.28	\$3,835.83	\$3,883.16	\$3,981.61	\$4,094.92	2.8%		100%

Southeast visitor spending, 2019

Southeast Region								
County	Visitor Spending - 2019 (millions)						Growth Rate	State and Local Tax Revenue (millions)
	Lodging*	F&B	Recreation	Retail	Transport**	Total		
Bon Homme County	\$0.39	\$1.91	\$0.40	\$0.41	\$2.43	\$5.54	6.8%	\$0.53
Clay County	\$3.63	\$8.33	\$2.13	\$3.26	\$10.51	\$27.86	-1.8%	\$2.14
Davison County	\$18.96	\$23.67	\$17.04	\$21.08	\$23.64	\$104.39	3.8%	\$7.75
Douglas County	\$0.26	\$0.68	\$0.14	\$0.78	\$1.33	\$3.19	1.4%	\$0.33
Hanson County	\$0.67	\$0.68	\$0.43	\$0.58	\$1.04	\$3.40	-4.8%	\$0.37
Hutchinson County	\$0.95	\$1.93	\$0.83	\$1.93	\$4.20	\$9.84	2.6%	\$0.95
Lake County	\$2.91	\$8.17	\$4.20	\$4.51	\$6.10	\$25.89	2.2%	\$1.94
Lincoln County	\$8.71	\$21.60	\$20.90	\$13.12	\$28.61	\$92.95	8.0%	\$9.06
McCook County	\$1.33	\$1.64	\$0.79	\$3.24	\$2.51	\$9.51	1.9%	\$0.73
Miner County	\$0.82	\$1.04	\$0.56	\$1.32	\$1.12	\$4.85	-8.9%	\$0.42
Minnehaha County	\$149.11	\$262.34	\$155.50	\$305.86	\$323.15	\$1,195.97	7.0%	\$83.54
Turner County	\$0.73	\$1.29	\$0.66	\$1.42	\$2.76	\$6.86	6.6%	\$0.78
Union County	\$6.08	\$11.16	\$10.82	\$8.10	\$10.56	\$46.72	-4.0%	\$4.30
Yankton County	\$10.24	\$22.51	\$10.42	\$16.78	\$15.33	\$75.28	2.7%	\$4.99
Region Total	\$204.78	\$366.94	\$224.82	\$382.39	\$433.31	\$1,612.24	9.7%	\$117.83
State Total	\$769.39	\$916.76	\$604.92	\$862.95	\$940.90	\$4,094.92	2.8%	\$307.65

* Lodging spending includes 2nd home valuation

** Transport includes local and air transportation

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	\$10.68	\$28.36	3.7%	\$2.13
Davison County	\$17.72	\$22.59	\$16.14	\$20.09	\$24.05	\$100.58	-2.6%	\$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	\$3.57	25.6%	\$0.34
Hutchinson County	\$0.90	\$1.75	\$0.80	\$1.99	\$4.15	\$9.59	3.4%	\$0.91
Lake County	\$2.81	\$7.94	\$4.20	\$4.36	\$6.03	\$25.34	-0.6%	\$1.93
Lincoln County	\$7.62	\$20.69	\$18.54	\$12.06	\$27.13	\$86.03	-7.7%	\$8.73
McCook County	\$1.27	\$1.56	\$0.80	\$3.22	\$2.47	\$9.33	-4.5%	\$0.78
Miner County	\$0.89	\$1.07	\$0.56	\$1.60	\$1.21	\$5.33	5.9%	\$0.42
Minnehaha County	\$133.15	\$242.79	\$145.17	\$283.68	\$312.72	\$1,117.51	5.4%	\$78.79
Turner County	\$0.69	\$1.13	\$0.66	\$1.30	\$2.65	\$6.44	-2.6%	\$0.76
Union County	\$6.05	\$11.55	\$11.57	\$8.68	\$10.81	\$48.66	4.4%	\$4.30
Yankton County	\$9.77	\$21.83	\$10.24	\$16.17	\$15.30	\$73.32	2.1%	\$4.95
Region Total	\$185.87	\$344.43	\$211.83	\$358.31	\$421.95	\$1,522.40	3.6%	\$112.60
State Total	\$739.59	\$885.07	\$597.63	\$837.66	\$921.66	\$3,981.61	2.5%	\$298.29

* 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	67	108	0.5%	0.2%	3.3%	\$1.11	\$2.53
Clay County	355	545	2.4%	1.0%	5.8%	\$6.24	\$11.86
Davison County	1,197	1,673	7.3%	3.0%	10.5%	\$24.96	\$44.29
Douglas County	20	41	0.2%	0.1%	1.9%	\$0.24	\$1.08
Hanson County	31	50	0.2%	0.1%	3.2%	\$0.66	\$1.53
Hutchinson County	78	150	0.7%	0.3%	3.3%	\$1.08	\$3.94
Lake County	324	435	1.9%	0.8%	5.4%	\$5.39	\$10.06
Lincoln County	594	1,343	5.9%	2.4%	3.9%	\$12.94	\$55.58
McCook County	62	99	0.4%	0.2%	3.4%	\$0.97	\$2.39
Miner County	44	66	0.3%	0.1%	4.1%	\$0.60	\$1.40
Minnehaha County	10,711	16,207	70.8%	29.4%	9.9%	\$278.28	\$565.36
Turner County	62	133	0.6%	0.2%	3.1%	\$0.96	\$3.69
Union County	485	776	3.4%	1.4%	5.6%	\$9.79	\$27.64
Yankton County	835	1,259	5.5%	2.3%	7.3%	\$16.18	\$33.74
Region Total	14,800	22,886		41.5%		\$359.40	\$765.08
State Total	37,871	55,157			9.0%	\$877.63	\$1,655.38

Methodology and Background



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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.
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