

2024

Economic Impact of Visitors in South Dakota

Conducted by:



Prepared for:
South Dakota
Department of Tourism



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Introduction

The travel sector is an integral part of South Dakota's economy. Visitors generate significant economic benefits to households, businesses, and government, and represents a critical driver of the State's future. In 2024, the visitor economy generated \$8.1 billion in total business sales and supported 8.7% of all jobs in South Dakota.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. This is especially true as South Dakota's tourism industry continues to expand. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the significance of the visitor economy in South Dakota, Tourism Economics developed a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the visitor economy in terms of direct visitor spending, along with total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

An IMPLAN input-output model was constructed for South Dakota. The model traces the flow of visitor-related expenditures through the city's economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data by sector.

Visitors included those who stayed overnight or traveled more than 50 miles to the destination. The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis. This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the ES202 data.

The analysis draws on the following data sources:

- Future Partners: Visitor profile and survey data to South Dakota
- Bureau of Economic Analysis and Bureau of Labor Statistics: Employment and wage data, by industry
- STR & AirDNA: Lodging performance data, including room demand, room rates, occupancy, and room revenue, for hotels and short-term rentals
- SD Department of Revenue: Sales tax data by category for South Dakota
- National Park Service: Visitor and budget data for National Parks in South Dakota
- U.S. Census Bureau: 2017 Economic Census data, in addition to population, household, second homes and median real estate tax data
- Tourism Economics: International travel data for overseas, Canadian, and Mexican travel to South Dakota based on aviation, survey, and credit card information
- U.S. Energy Information Administration: gasoline prices for Midwest region
- U.S. Bureau of Transportation: Passenger data for airports in South Dakota

KEY FINDINGS



Key Findings

The Visitor Economy Drives Economic Impact

In 2024, nearly 15 million visitors spent \$5.1 billion across South Dakota. Visitor spending increased 2.8% versus the prior year to a new high-water mark as a result of both price and demand increases.



14.9M

Visitors to
South Dakota



\$5.1B

Visitor
Spending



\$8.1B

Total Business
Sales



\$2.2B

Total Labor
Income



58,824

Total Jobs
Supported



\$399M

State and
Local Taxes

Total Economic Impacts of Visitors in South Dakota (2024)

The visitor spending impact of \$5.1 billion generated a total economic impact of \$8.1 billion in South Dakota in 2024 including indirect and induced impacts. This total economic impact sustained 58,824 jobs and generated nearly \$400 million in state and local tax revenues.



Tourism’s
economic
impact in
South
Dakota
totaled **\$8.1
billion** in
2024.

VISITOR SPENDING



Visitors to South Dakota spent **\$5.1 billion** in 2024.

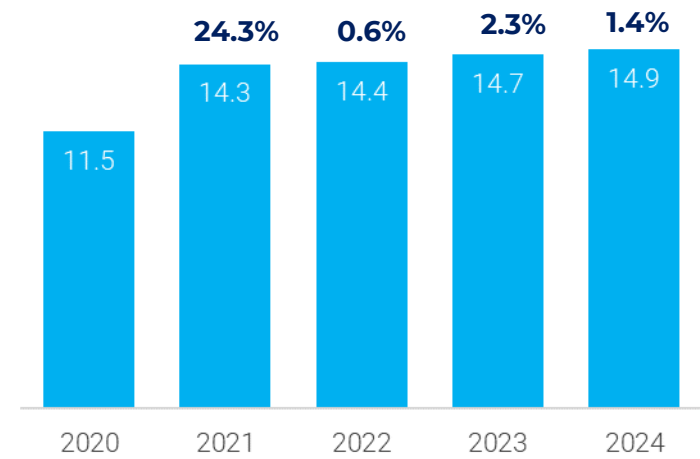


Visitor Volume and Spending

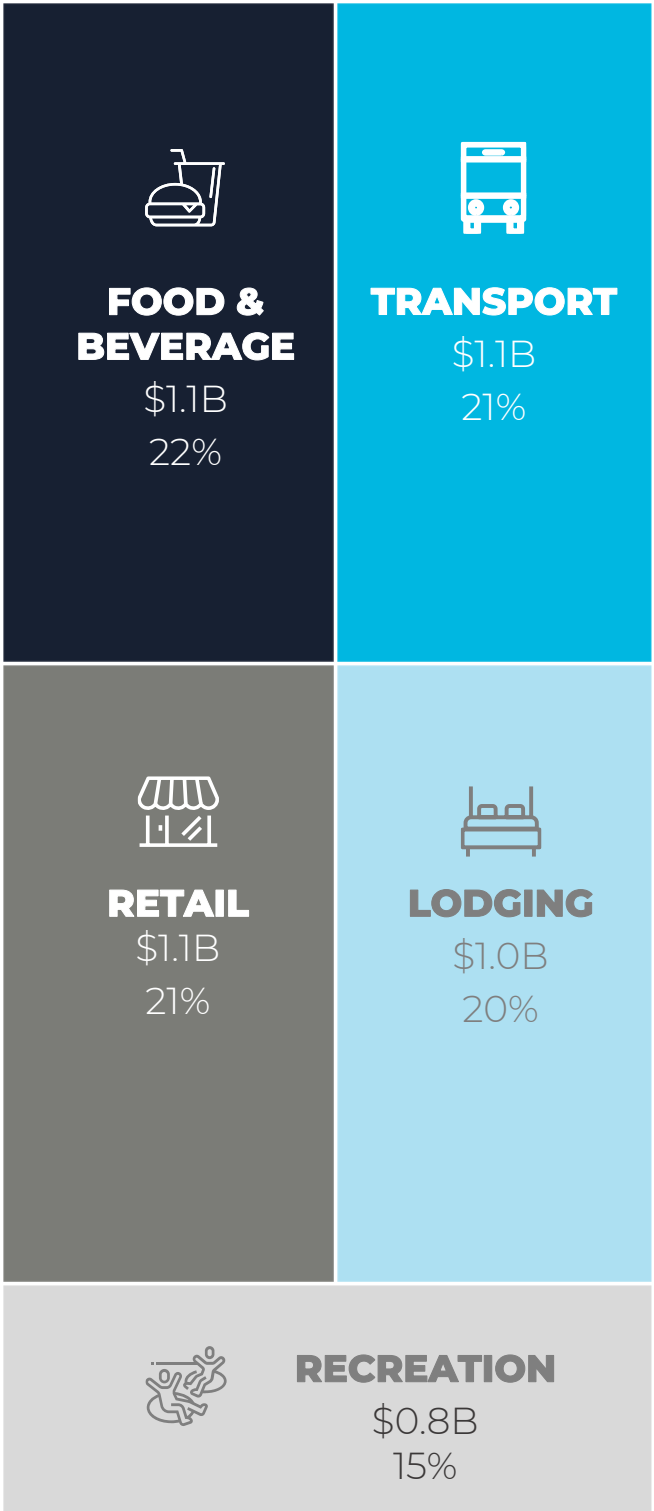
Visitor Volume

Visitor volumes reached a new highwater mark of nearly 15 million visitors in 2024, an increase of over 200,000 visitors. The increase in visitors was primarily driven by the return of international visitors to South Dakota.

South Dakota Visitor Volume
Amounts in millions of visitors



Source: Tourism Economics



Source: Tourism Economics

Visitor Spending

Visitors to South Dakota spent **\$5.1 billion** across various sectors in 2024.

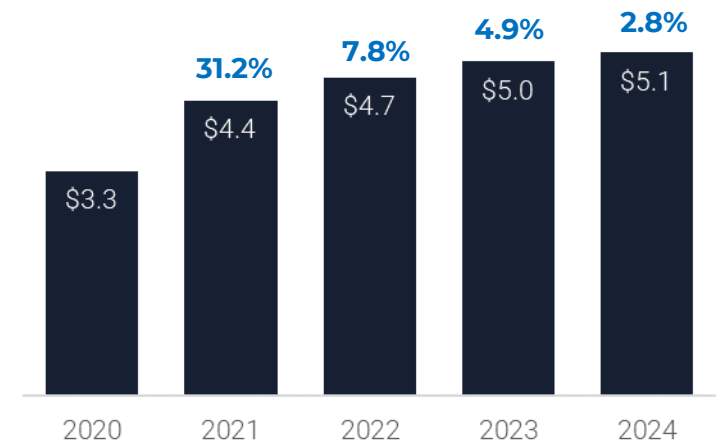
Visitor Spending on food and beverage reached \$1.1 billion, 22% of total visitor spending. Spending on transportation, including local and air transportation tallied to \$1.1 billion in 2024, 21% of the total.

Retail spending accounted for 21% of total spending, or \$1.1 billion.

Spending on lodging, including short-term rental and second homes, reached \$1.1 billion, or 20% of total visitor spending.

Spending on recreation tallied \$0.8 billion, 15% of total visitor spending.

South Dakota Visitor Spending
Amounts in \$ billions



Source: Tourism Economics

Note: Lodging spending is calculated as an industry and includes the spending of short-term rentals and value of second homes. Transportation includes both air and local transportation.

Visitor Spending Trends

Visitor spending increased 2.8% in 2024 to \$5.1 billion, a new highwater mark for South Dakota.

By spending category, lodging led growth in 2024, increasing 5.4% year-over-year, due in part by short-term rental demand and price increases.

Growth in food and beverage spending followed, at 3.8% in 2024.

Meanwhile recreation spending grew 3.4% as visitor preferences shifted towards experiential spending. Retail spending grew by 2.6% over the prior year.

Transportation spending declined 1.0% in 2024, primarily being driven by declines in gas prices, as most visitors to South Dakota arrive by car.

South Dakota Visitor Spending

Amounts in \$ millions, and 2024 percent % change

	2020	2021	2022	2023	2024	2024 Growth
Total visitor spending	\$3,343	\$4,387	\$4,730	\$4,963	\$5,099	2.8%
Lodging*	\$604	\$888	\$898	\$966	\$1,018	5.4%
Food & beverage	\$806	\$1,014	\$1,064	\$1,102	\$1,144	3.8%
Retail	\$745	\$914	\$1,008	\$1,043	\$1,070	2.6%
Transportation**	\$700	\$902	\$1,040	\$1,101	\$1,090	-1.0%
Recreation	\$489	\$669	\$720	\$751	\$776	3.4%

Source: Tourism Economics

* Lodging includes spending on short-term rentals and the value of second homes

** Transportation includes both ground and air transportation



VISITOR ECONOMY TRENDS

The visitor economy looks at a broader range of tourism-related expenditures. These include government support for tourism as well as capital investment (both new structures and machinery and equipment spending).

Overall, visitor economy spending in 2024 neared \$5.5 billion, led by domestic traveler spending at \$5.0 billion. Capital investment in support of tourism totaled \$240 million in 2024, an increase of 5.4%.

Tourism Capital Investment

Amounts in \$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total Tourism CAPEX	\$204	\$219	\$239	\$228	\$240	5.4%
Machinery & equip.	\$108	\$125	\$137	\$144	\$164	14.2%
Construction	\$96	\$94	\$103	\$84	\$76	-9.8%

Sources: Tourism Economics, Oxford Economics.

VISITOR ECONOMY DISTRIBUTION

In South Dakota, the international visitor markets increased its share to 1.5% of tourism demand in 2024; up from 1.3% in 2023.

Capital investment in tourism-related construction and machinery & equipment represented 4.4% of all tourism-related demand.

Domestic visitor markets remain the largest category, providing 91.9% of demand in 2024.

The governmental support share was 1.7% of the South Dakota visitor economy in 2024.

South Dakota Visitor Economy

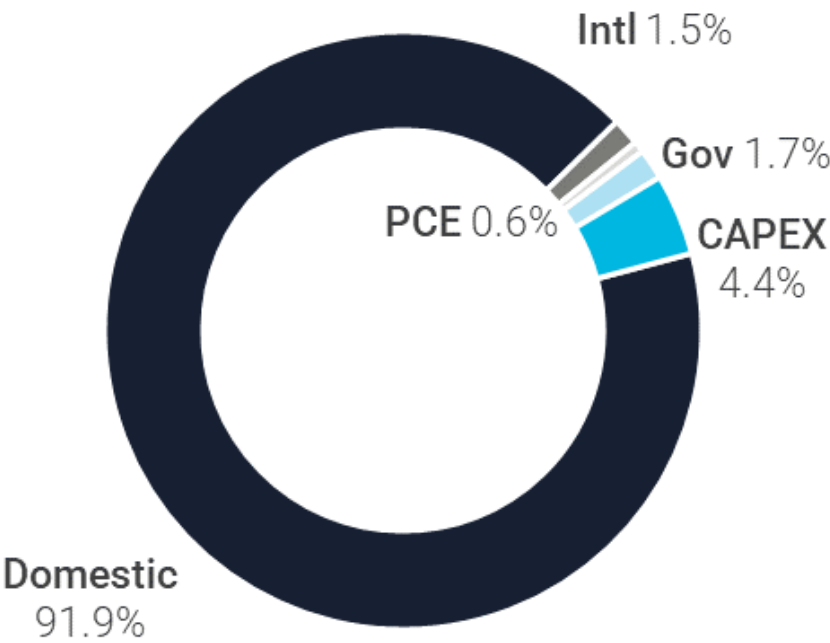
Amounts in \$ millions, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth
Tourism Demand	\$3,653	\$4,698	\$5,079	\$5,312	\$5,464	2.9%
Domestic Visitor	\$3,324	\$4,365	\$4,692	\$4,893	\$5,019	2.6%
International Visitor	\$19	\$22	\$37	\$70	\$81	15.0%
Non-visitor PCE	\$41	\$24	\$27	\$32	\$33	4.9%
Governmental Support	\$65	\$68	\$82	\$89	\$91	1.6%
Capital Investment	\$204	\$219	\$239	\$228	\$240	5.4%

Sources: Tourism Economics, Oxford Economics

South Dakota Visitor Economy

Percent distribution



Sources: Oxford Economics,Tourism Economics

ECONOMIC IMPACT METHODOLOGY

Economic Impact Methodology

Our analysis of the South Dakota visitor economy begins with direct visitor spending and analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the South Dakota economy, constructed using an IMPLAN input-output (I-O) model.

IMPLAN remains a nationally recognized and widely used modeling tool, the leading provider of economic impact data and analytics software. The model traces the full extent of industry impacts as dollars flow through the local economy.

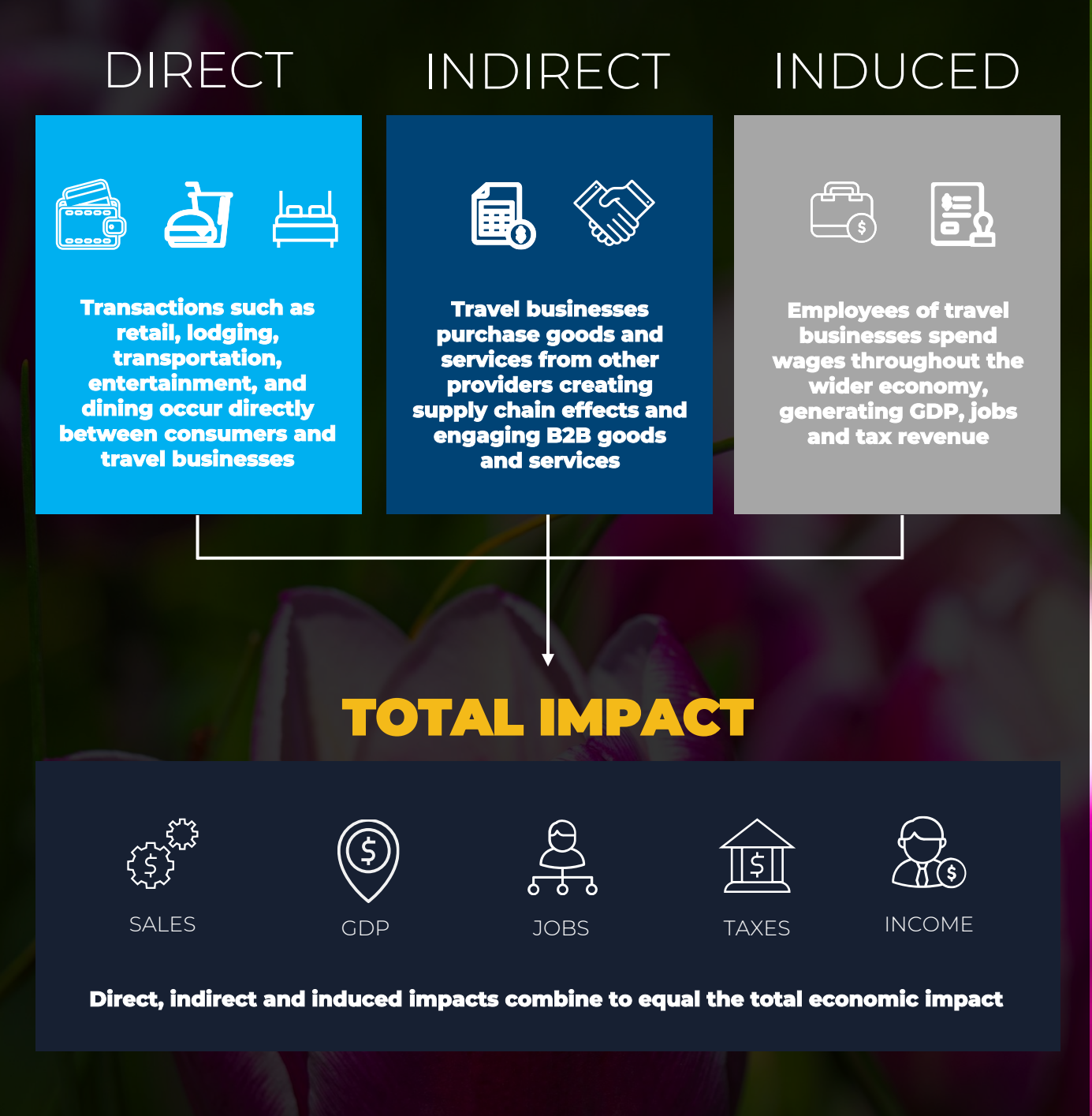
I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact:

- 1. **Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. **Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.
- 3. **Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact—direct, indirect and induced—for a broad set of indicators, including:

- Spending
 - GDP
 - Wages
 - Employment
- Federal Taxes
 - State Taxes
 - Local Taxes

Economic Impact Framework



ECONOMIC IMPACT

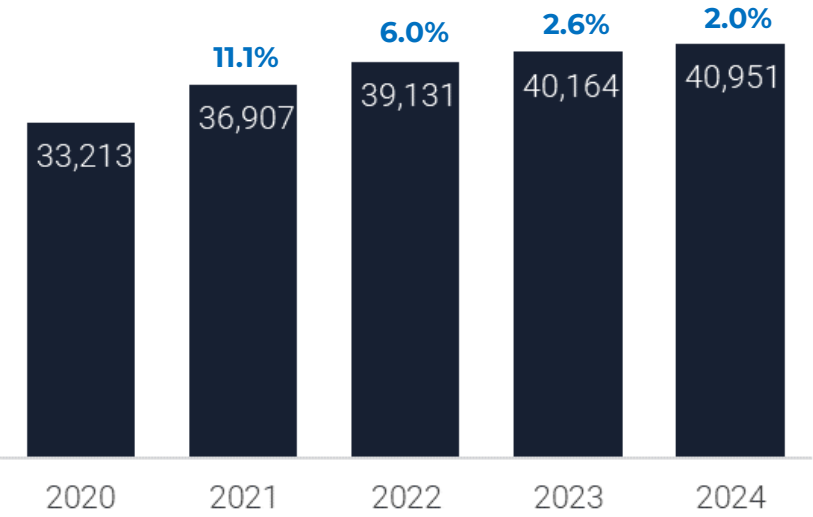


Direct Employment

Employment directly supported by visitor spending increased 2.0% in 2024, expanding to nearly 41,000 jobs. Growth in visitor-supported jobs has outpaced visitor volume growth, as businesses hire more employees to make up for demand increases over prior years. Compared to other industries, employment directly supported by tourism ranks 8th in the State.

Visitor Supported Employment in South Dakota

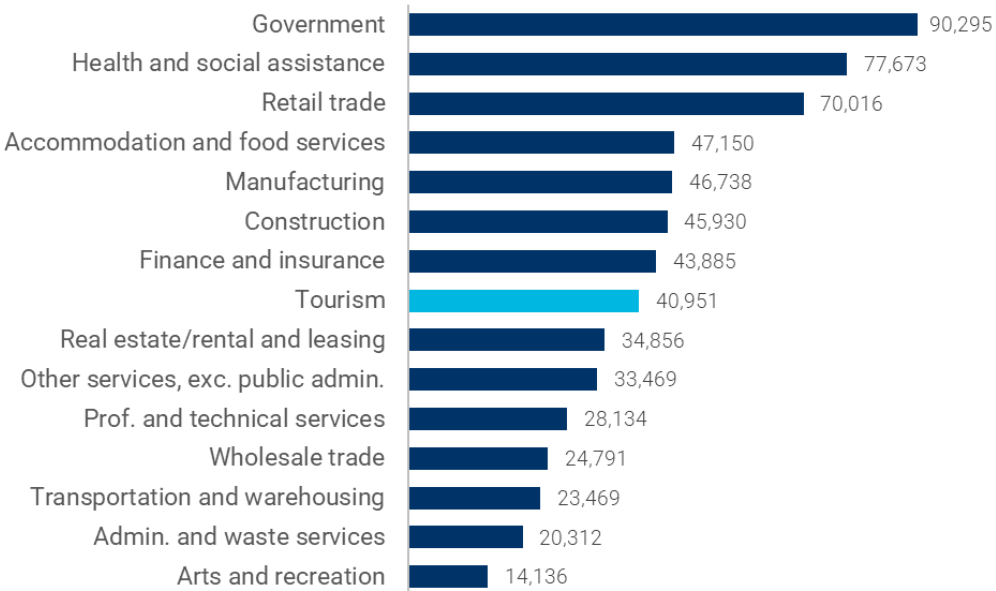
Amounts in number of jobs, direct only



Source: Tourism Economics

Employment in South Dakota, by major industry

Amounts in number of jobs



Sources: BEA, BLS, Tourism Economics

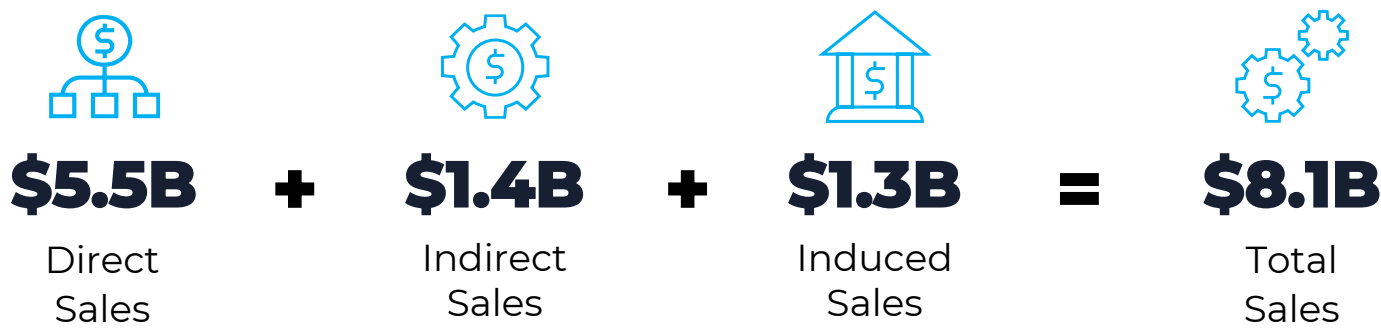
The tourism industry in **South Dakota** directly supported 40,951 **local jobs**.



Visitor Economy Business Sales Impacts

The visitor economy - including visitor spending, as well as government support and capital investment for tourism - contributed a direct impact of \$5.4 billion in 2024. This direct impact generated \$2.7 billion in indirect and induced impacts, resulting in a total economic impact of \$8.1 billion in South Dakota’s economy. The total economic impact shows the benefits to the broader economy across industries at the indirect and induced levels.

Summary of Business Sales Economic Impacts



Business Sales Impacts by Industry (2024)

Amounts in \$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$5,464	\$1,363	\$1,294	\$8,120
Food & Beverage	\$1,144	\$61	\$107	\$1,313
Retail Trade	\$1,101	\$26	\$96	\$1,224
Lodging	\$953	\$0	\$1	\$954
Finance, Insurance, Real Estate	\$106	\$436	\$379	\$920
Gasoline Stations	\$820	\$1	\$8	\$829
Recreation and Entertainment	\$675	\$42	\$26	\$743
Construction and Utilities	\$240	\$122	\$40	\$402
Business Services	\$16	\$275	\$84	\$375
Education and Health Care		\$4	\$302	\$307
Other Transport	\$140	\$57	\$23	\$221
Personal Services	\$85	\$43	\$70	\$198
Wholesale Trade		\$96	\$66	\$162
Government	\$91	\$45	\$25	\$161
Communications		\$79	\$38	\$117
Air Transport	\$90	\$2	\$3	\$94
Manufacturing	\$2	\$55	\$15	\$72
Agriculture, Fishing, Mining		\$20	\$7	\$28

Source: Tourism Economics

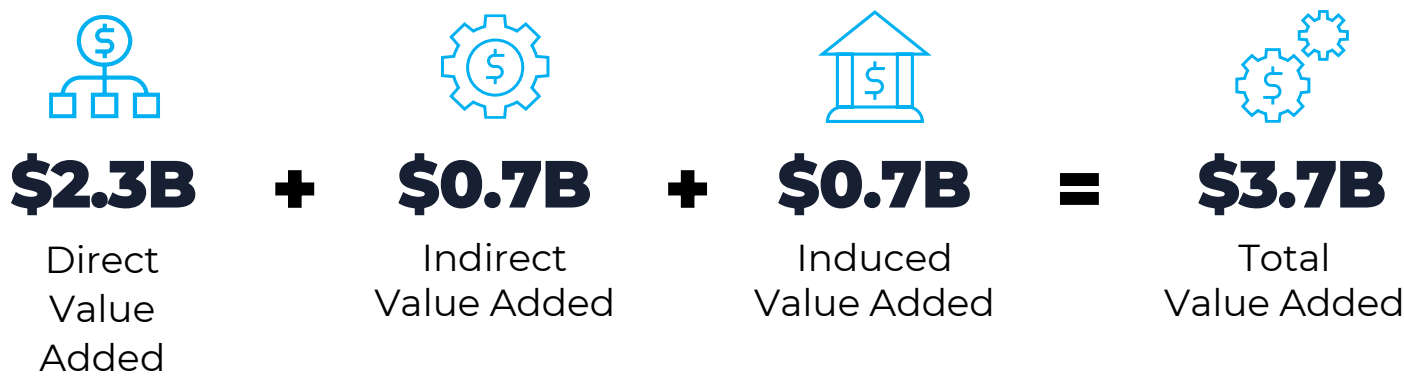
The total economic impact of **\$8.1 billion** accrued to industries across the economy.



Value Added Impacts

The value of all visitor-supported goods & services produced in South Dakota in 2024 for South Dakota visitors was \$3.7 billion, 5.0% of South Dakota’s GDP.

Summary of Value Added Economic Impacts



Value Added Impacts by Industry (2024)

Amounts in millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$2,255	\$736	\$692	\$3,682
Food & Beverage	\$550	\$35	\$56	\$641
Lodging	\$617	\$1	\$2	\$620
Finance, Insurance, Real Estate	\$21	\$252	\$220	\$493
Recreation and Entertainment	\$372	\$15	\$13	\$400
Retail Trade	\$256	\$21	\$55	\$332
Business Services	\$8	\$167	\$43	\$219
Construction and Utilities	\$131	\$51	\$16	\$198
Education and Health Care		\$1	\$169	\$170
Personal Services	\$60	\$30	\$38	\$128
Other Transport	\$63	\$30	\$10	\$104
Wholesale Trade		\$57	\$36	\$93
Gasoline Stations	\$81	\$1	\$4	\$86
Government	\$55	\$11	\$3	\$69
Communications		\$36	\$19	\$56
Air Transport	\$36	\$1	\$1	\$37
Manufacturing	\$2	\$20	\$4	\$26
Agriculture, Fishing, Mining		\$7	\$3	\$10

Source: Tourism Economics

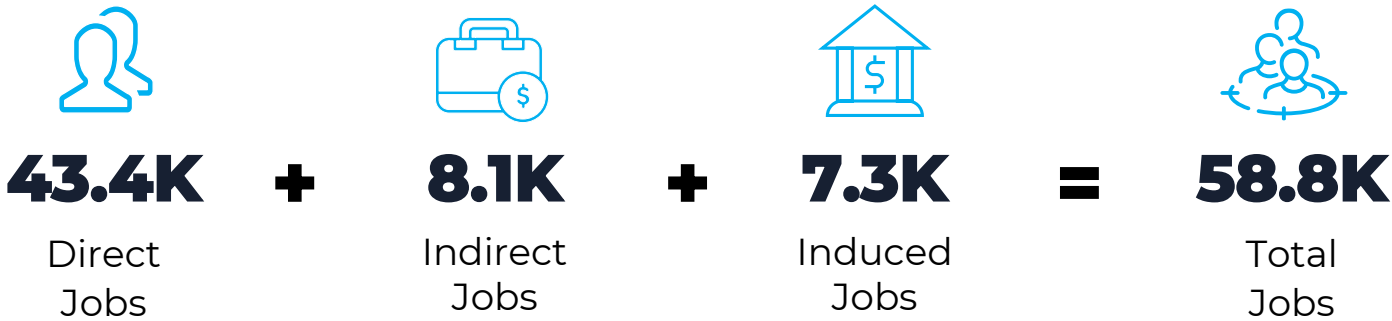
The total value added contribution of visitor spending to the state economy was **\$3.7 billion** in 2024.



Employment Impacts

Visitor activity sustained 43,433 direct jobs in 2024, with an additional 15,391 jobs supported from the indirect and induced impacts of visitor activity. The total jobs impact increased to 58,824 in 2024, one of every 11 jobs in the State. Visitor spending supports the largest number of jobs in the food and beverage industry (16,110).

Summary of Employment Economic Impacts



Employment Impacts by Industry (2024)

Amounts in number of jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	43,433	8,077	7,314	58,824
Food & Beverage	14,063	905	1,142	16,110
Recreation and Entertainment	8,908	459	261	9,628
Lodging	8,815	1	10	8,826
Retail Trade	4,790	264	938	5,993
Finance, Insurance, Real Estate	226	1,912	917	3,055
Personal Services	1,583	395	735	2,713
Business Services	70	2,062	544	2,676
Construction and Utilities	1,672	352	92	2,115
Education and Health Care		66	2,017	2,083
Other Transport	1,248	624	199	2,071
Gasoline Stations	1,090	8	64	1,162
Government	659	221	77	957
Wholesale Trade		309	163	472
Communications		243	91	334
Manufacturing	58	188	36	282
Air Transport	251	3	4	258
Agriculture, Fishing, Mining		65	24	89

Source: Tourism Economics

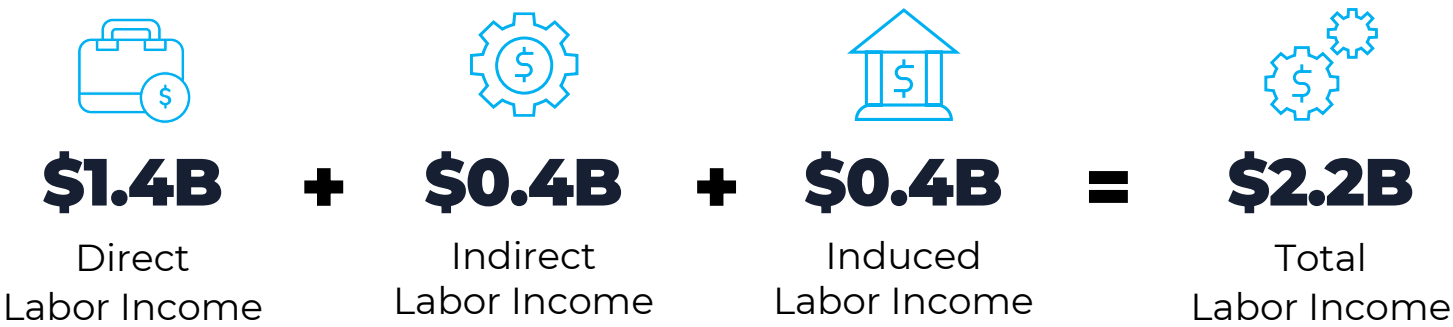
Visitor spending supports **1-in-11 of all jobs** in South Dakota, including over **16,100 jobs** in the food and beverage industry.



Labor Income Impacts

Visitor activity generated \$1.4 billion in direct labor income and a total of \$2.2 billion including indirect and induced impacts. There are nine industries in which visitor activity supports more than \$120 million in total labor income.

Summary of Labor Income Economic Impacts



Labor Income Impacts by Industry (2024)

Amounts in millions

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$1,421	\$438	\$383	\$2,242
Food & Beverage	\$351	\$23	\$29	\$403
Lodging	\$319	\$0	\$0	\$319
Recreation and Entertainment	\$220	\$10	\$7	\$237
Retail Trade	\$177	\$11	\$37	\$225
Business Services	\$4	\$133	\$34	\$171
Finance, Insurance, Real Estate	\$8	\$103	\$47	\$157
Education and Health Care		\$2	\$145	\$147
Construction and Utilities	\$112	\$27	\$7	\$146
Personal Services	\$73	\$20	\$34	\$127
Other Transport	\$54	\$29	\$9	\$92
Government	\$38	\$18	\$6	\$61
Gasoline Stations	\$43	\$0	\$2	\$45
Wholesale Trade		\$27	\$15	\$42
Communications		\$16	\$7	\$23
Air Transport	\$21	\$1	\$1	\$22
Manufacturing	\$2	\$13	\$3	\$17
Agriculture, Fishing, Mining		\$5	\$2	\$7

Source: Tourism Economics



Visitor spending drives income across industries, including **nine industries with more than \$120 million** in total income.

FISCAL IMPACT



Fiscal Impacts

Visitor spending, visitor supported jobs, and business sales generated \$870.0 million in government revenues in 2024.

State and local taxes tallied \$398.7 million.

Each household in South Dakota would need to be taxed an additional **\$1,105** to replace the visitor-generated taxes received by state and local government in 2024.

Among the \$191.7 million in sales tax revenue generated, \$120.4 million is directly attributable to visitors to South Dakota. Among the \$120.4 million in sales tax revenue, \$92.5 million or 76.8% can be attributed to out of State domestic visitors. 21.6% of visitor sales tax revenue or \$26.0 million can be attributed to domestic in State visitors. Approximately 1.6% or \$1.9 million visitor sales tax is generated by international visitors to South Dakota.

Fiscal (Tax) Impacts

Amounts in \$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total Tax Revenues	\$612.5	\$723.3	\$795.2	\$838.4	\$870.0	3.8%
Federal Taxes	\$336.5	\$378.8	\$434.3	\$454.5	\$471.3	3.7%
Personal Income	\$114.3	\$127.8	\$148.5	\$156.2	\$162.3	3.9%
Corporate	\$34.1	\$31.9	\$33.8	\$34.0	\$35.0	2.7%
Indirect Business	\$21.7	\$21.7	\$22.9	\$23.3	\$23.8	2.0%
Social Insurance	\$166.4	\$197.4	\$229.1	\$240.9	\$250.3	3.9%
State and Local Taxes	\$276.0	\$344.6	\$360.9	\$384.0	\$398.7	3.8%
Sales	\$133.9	\$170.3	\$175.2	\$187.0	\$191.7	2.5%
Bed Tax	\$22.4	\$33.3	\$33.7	\$36.2	\$38.2	5.5%
Corporate	\$2.0	\$2.1	\$2.3	\$2.7	\$2.7	2.7%
Social Insurance	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	3.9%
Excise and Fees	\$24.4	\$28.1	\$29.6	\$31.0	\$32.6	4.9%
Property	\$93.1	\$110.5	\$119.8	\$126.8	\$133.3	5.2%

Source: Tourism Economics

Fiscal (Tax) Impacts – State and Local Breakouts

Amounts in \$ millions

	2020	2021	2022	2023	2024	2024 Growth
Total State & Local	\$276.0	\$344.6	\$360.9	\$384.0	\$398.7	3.8%
State Taxes	\$118.5	\$160.3	\$167.2	\$178.3	\$183.4	2.9%
Sales	\$96.6	\$135.1	\$140.2	\$150.4	\$154.1	2.5%
Corporate	\$2.0	\$2.1	\$2.3	\$2.7	\$2.7	2.7%
Social Insurance	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	3.9%
Excise and Fees	\$19.7	\$22.8	\$24.5	\$25.0	\$26.3	5.2%
Property	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
Local Taxes	\$157.5	\$184.3	\$193.7	\$205.7	\$215.3	4.7%
Sales	\$37.3	\$35.1	\$35.1	\$36.6	\$37.5	2.5%
Bed Tax	\$22.4	\$33.3	\$33.7	\$36.2	\$38.2	5.5%
Excise and Fees	\$4.7	\$5.3	\$5.1	\$6.1	\$6.3	3.5%
Property	\$93.1	\$110.5	\$119.8	\$126.8	\$133.3	5.2%

Source: Tourism Economics



Visitor spending, reduces the tax burden by **\$1,105 per household** in South Dakota.

ECONOMIC IMPACT IN CONTEXT



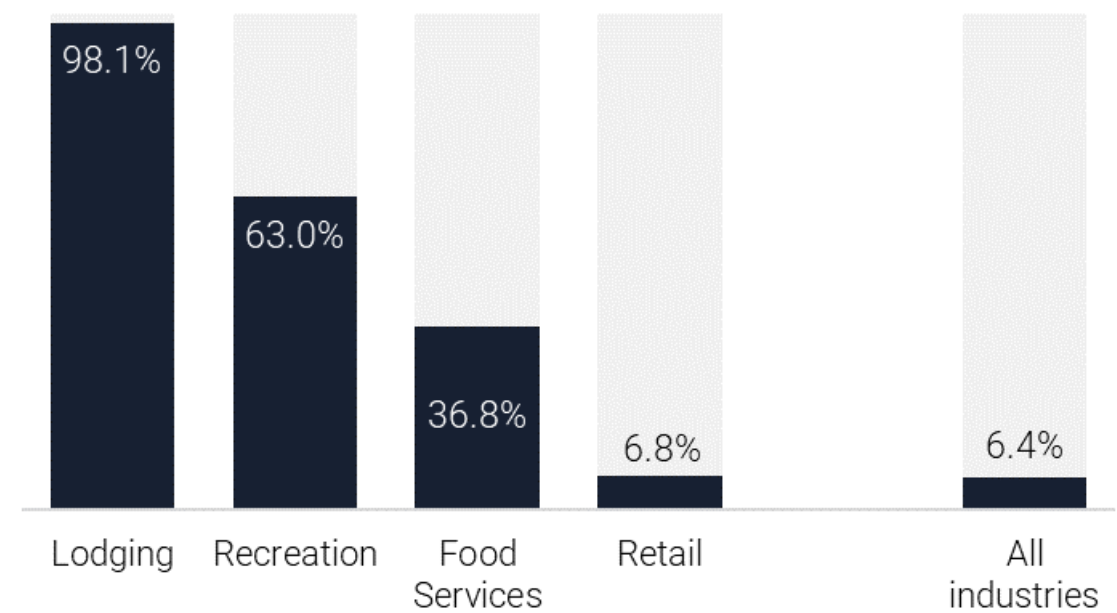
Tourism is an economic driver for South Dakota

Visitor activity supported a significant portion of direct employment in several key industries in South Dakota. Visitors sustained nearly all employment in the lodging sector, 63.0% of recreation employment, and 36.8% of food services employment.

Overall, visitor-supported direct employment accounted for approximately 6.4% of all jobs in South Dakota in 2024.

Direct Visitor Employment Intensity

Amounts in percentage of total industry employment, direct only



Source: Tourism Economics

Economic Impact In Context



\$5.1B VISITOR SPENDING

The \$5.1 billion in visitor spending means that almost **\$15 million** was spent **every day** by visitors in South Dakota, on average.



\$2.2B LABOR INCOME

The \$2.2 billion in total income generated by tourism is the equivalent of **\$6,211 per household** in South Dakota.



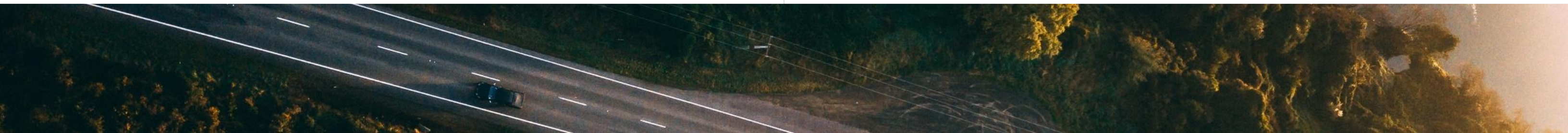
58,824 JOBS

The number of jobs sustained by tourism is enough to employ the entire population of Aberdeen and Brookings combined.



\$399M STATE & LOCAL TAXES

Each household in South Dakota would need to be taxed an additional **\$1,105** to replace the visitor taxes received by the state and local governments in 2024 – more than enough to cover the average American's per person holiday spending (\$902).



APPENDIX



Appendix

Glossary – Spending Definitions

Term	Description
Lodging	Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.
Food and beverage	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
Recreation	Includes visitors spending within the arts, entertainment and recreation sub-sector.
Shopping	Includes visitor spending in all retail sub-sectors within the local economy.
Local transport	Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending.
Service stations	Visitor spending on gasoline.
Second homes	Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau.

Glossary – Economic Impact Definitions

Term	Description
Direct Impact	Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).
Indirect Impact	Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
Induced Impact	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.
Employment	Employment is measured by the Bureau of Economic Analysis (BEA) and Bureau of Labor Statistics (BLS) definitions, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
Labor income	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
Value Added (GDP)	The economic enhancement a company gives its products or services before offering them to customers.
Local Taxes	City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.
State Taxes	State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 600 full-time staff, including 350 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Orlando, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



For more information, questions on the report or other general inquiries, please reach out to the team at admin@tourismeconomics.com.