

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: 2022 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

Total Economic Impacts of Visitors in South Dakota

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.



\$2.2B

Total Labor Income



58,824

Total Jobs Supported



\$399M

State and Local Taxes



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.

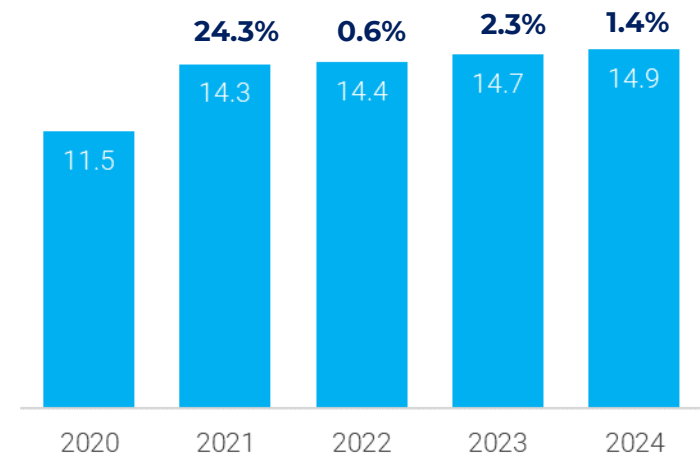


Visitor Volume and Spending

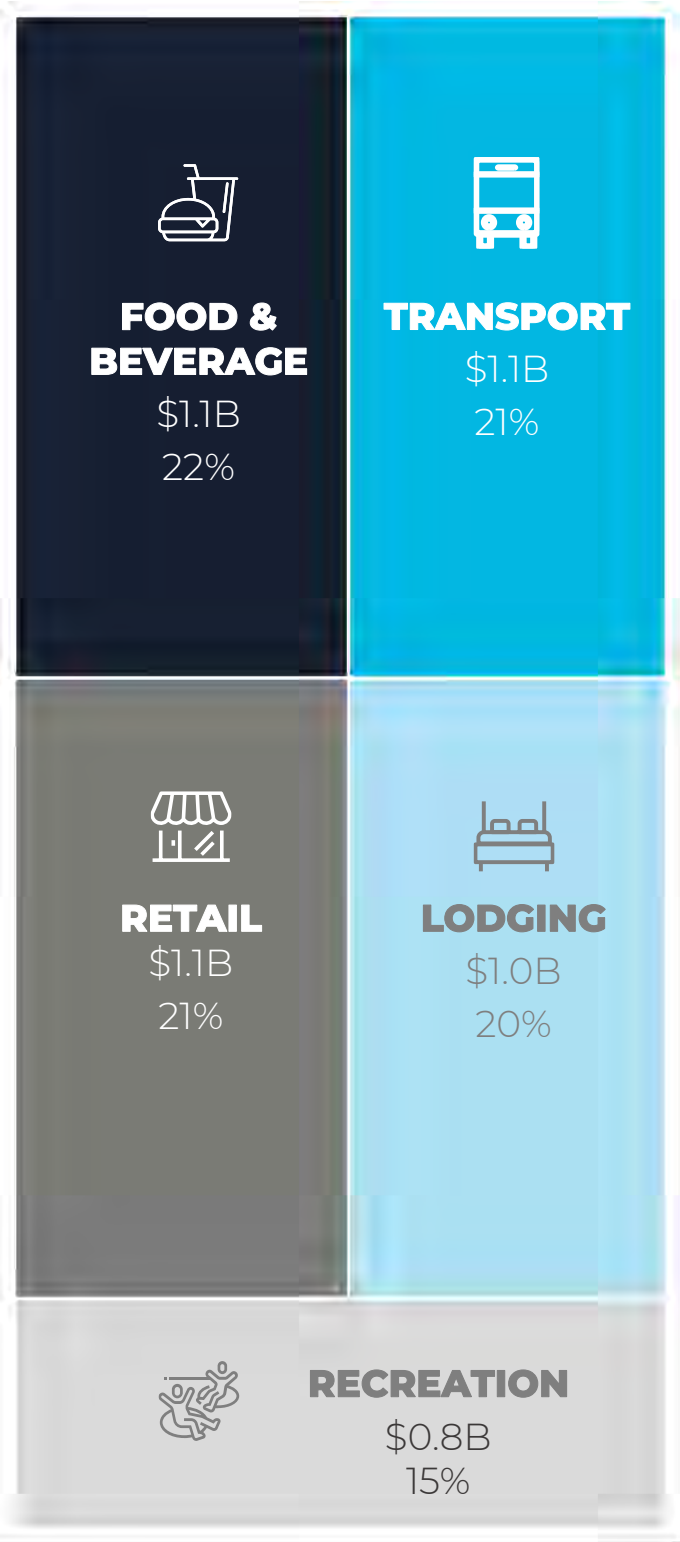
Visitor Volume

Visitor volumes reached a new record high 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.

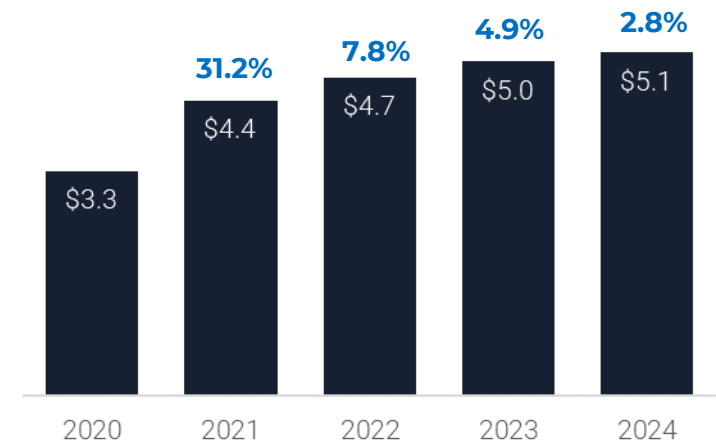
Visitor Spending on food and beverage reached \$1.1 billion, 22% of total visitor spending. Spending on transportation, including local and air transportation tallied to \$1.1 billion in 2024, 21% of the total.

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

Spending on lodging, including short-term rental and second homes, reached \$1.0 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 high-water mark for South Dakota.

By spending category, lodging led growth in 2024, increasing 5.4% year-over-year, due in part to 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 driven by declines in gas prices, as most visitors to South Dakota arrive by car.

South Dakota Visitor Spending

Amounts in \$ millions, and 2024 % 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

VISITOR ECONOMY DISTRIBUTION

In South Dakota, the international visitor market 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 remained 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

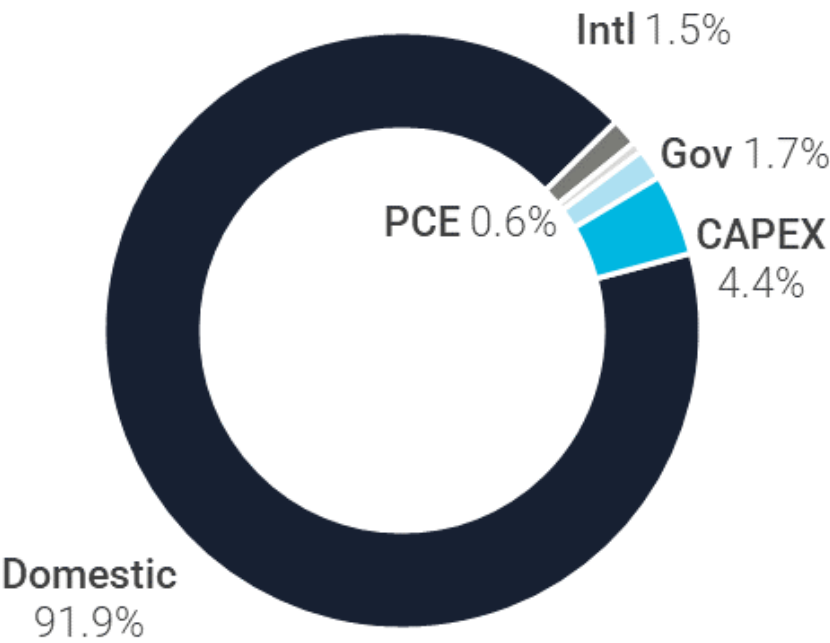
Amounts in \$ millions, and 2024 % change

	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

South Dakota Visitor Economy

Percent distribution



Sources: 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.

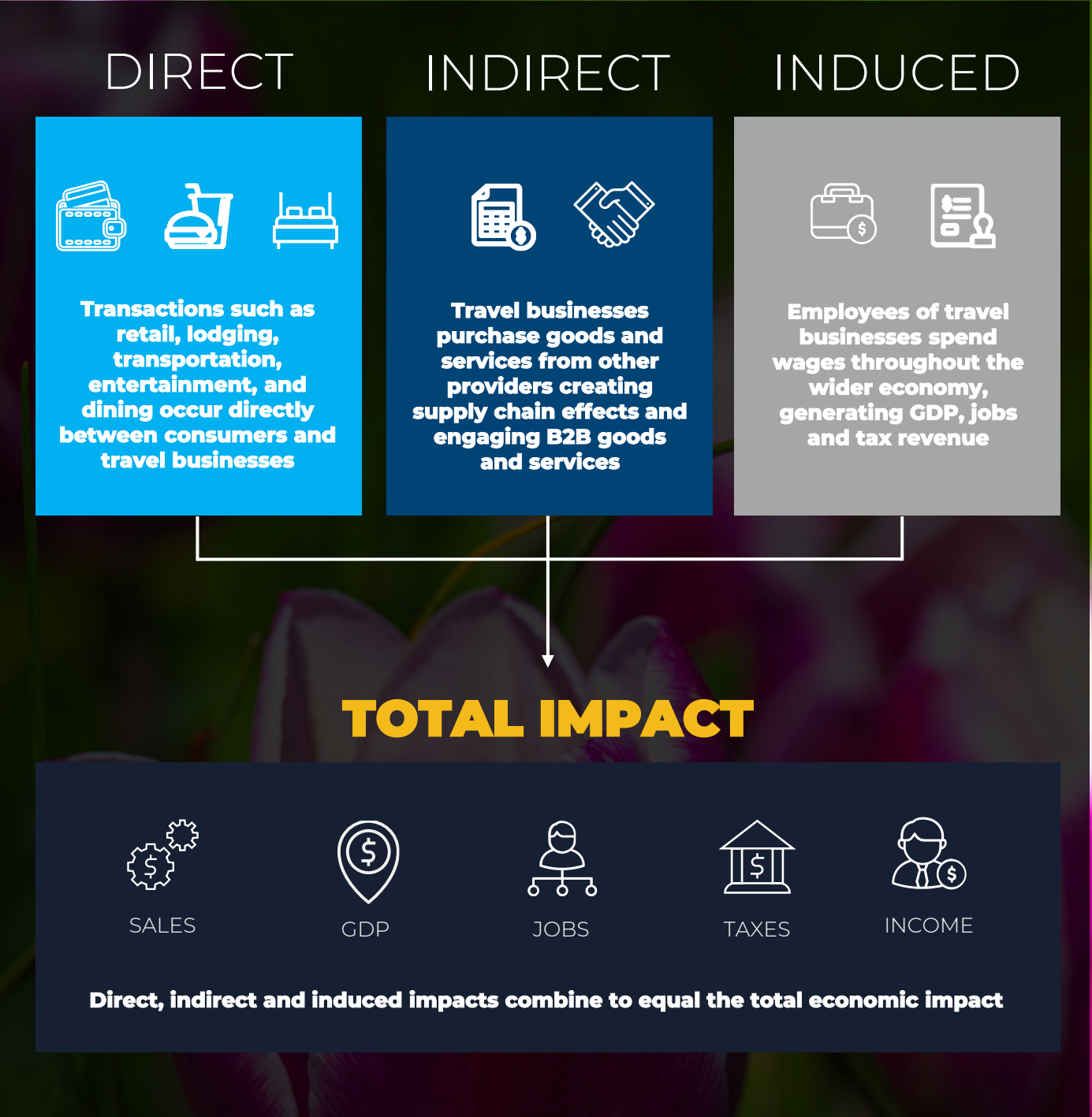
I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact:

- 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

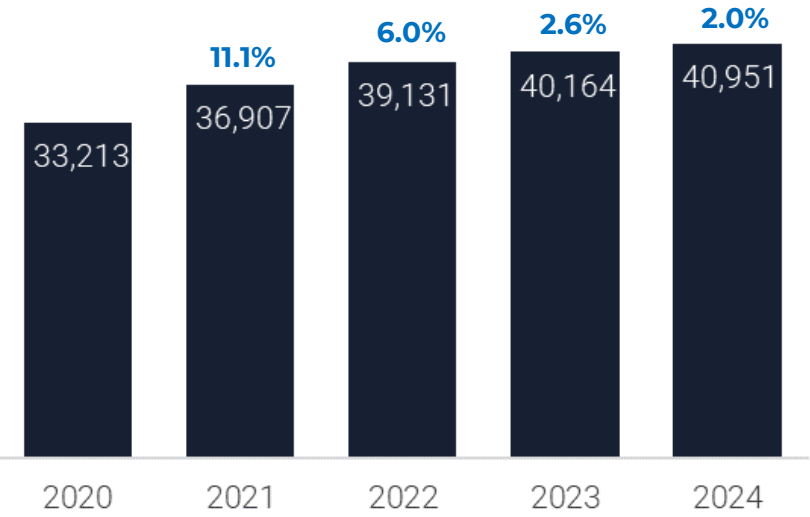


Direct Employment

Employment directly supported by visitor spending increased 2.0% in 2024, expanding to nearly 41,000 jobs. Growth in visitor-supported jobs which consists of jobs supported only by visitor consumption, 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

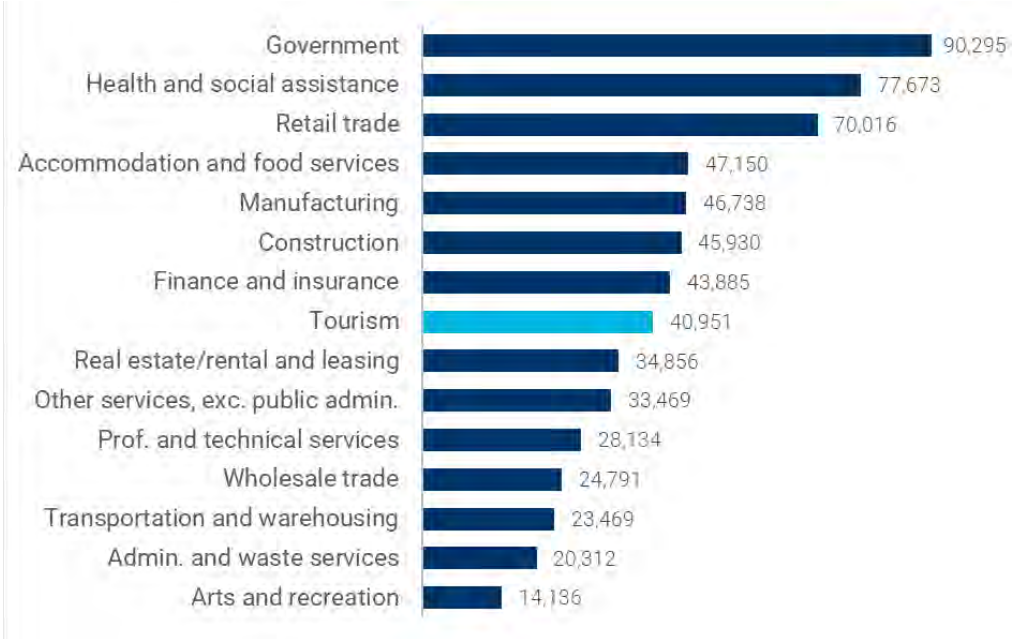
Amounts in number of jobs, direct only



Source: Tourism Economics

Employment in South Dakota, by major industry

Amounts in number of jobs



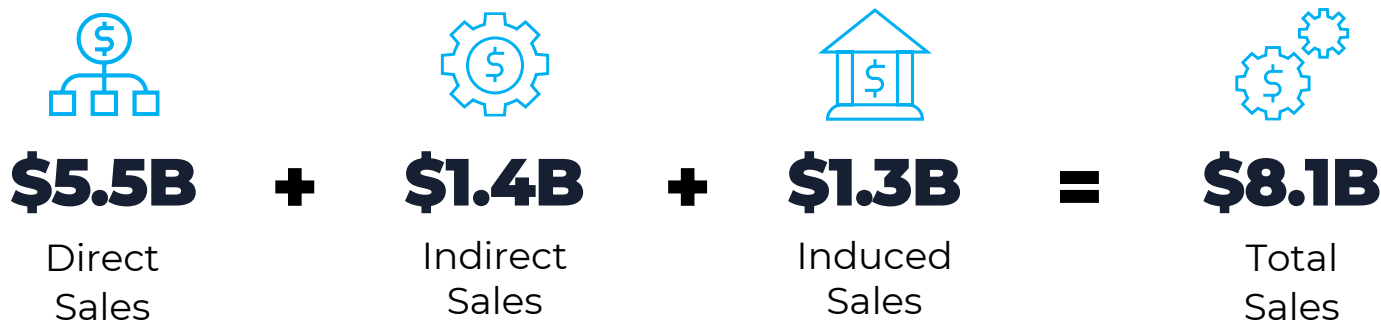
Sources: BEA, BLS, Tourism Economics



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

Business Sales Impacts

The visitor economy - including visitor spending, as well as government support and capital investment for tourism - contributed a direct impact of \$5.5 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.



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

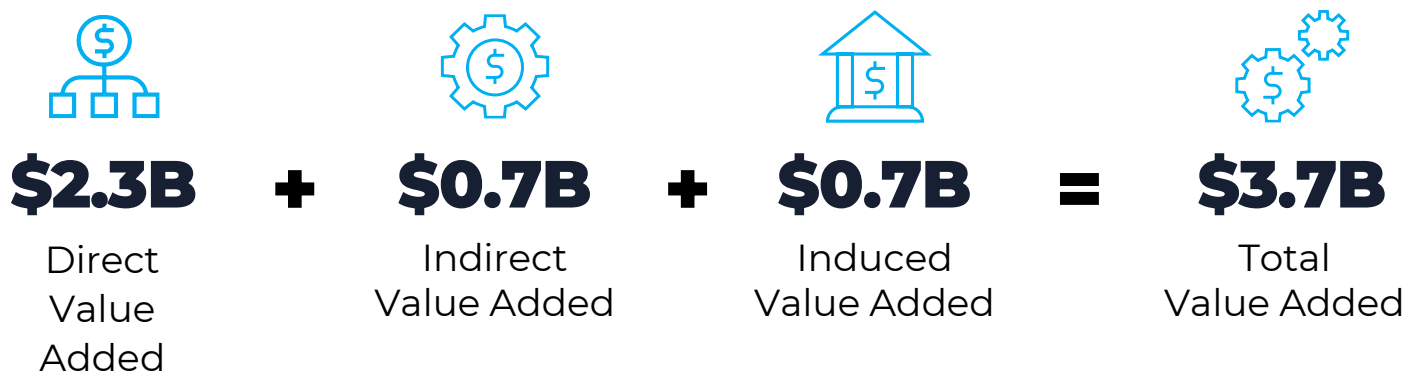
Source: Tourism Economics

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 was \$3.7 billion, 5.0% of South Dakota’s GDP.



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

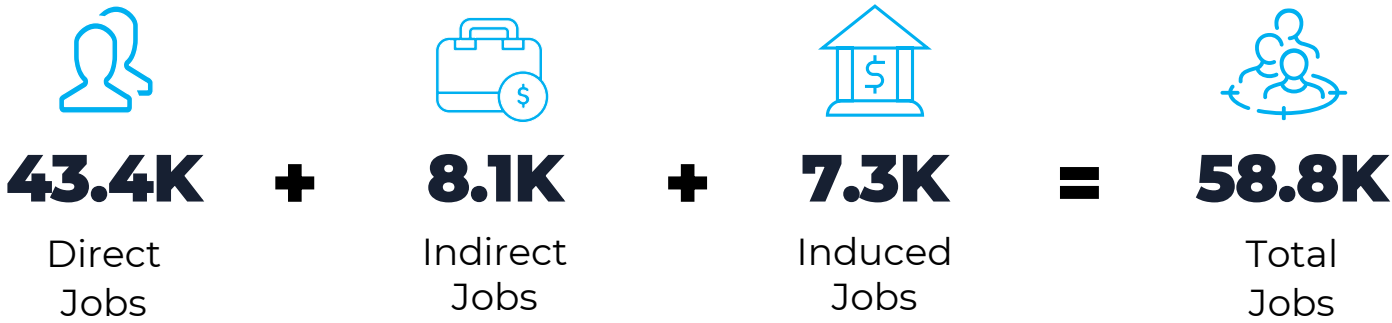
Source: Tourism Economics

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).



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

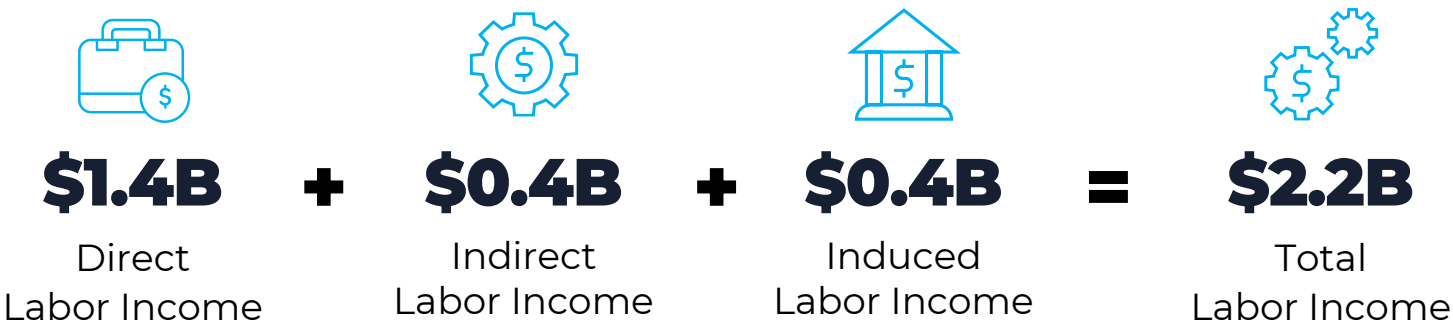
Source: Tourism Economics

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.



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 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. Of that \$120.4 million in sales tax revenue, \$92.5 million or 76.8% can be attributed to out-of-state domestic visitors while 21.6% of visitor sales tax revenue or \$26.0 million can be attributed to in-state domestic 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



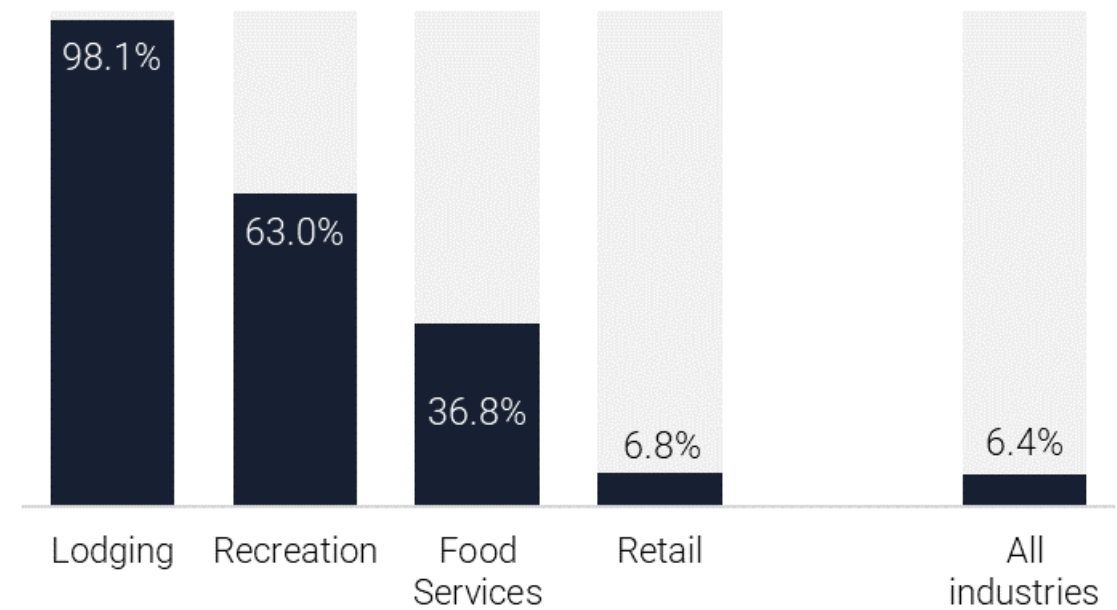
Tourism is an economic driver for South Dakota

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

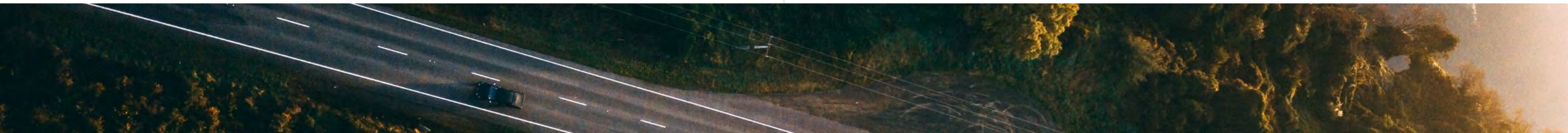
The number of jobs sustained by tourism is enough to employ the entire population of Aberdeen and Brookings combined.



\$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.

The \$399 million in State and Local Taxes is enough to fund the average salaries of 7,500 schoolteachers in South Dakota.



2024 COUNTY IMPACTS



South Dakota Visitor Spending by Region

Visitor spending expanded in all regions in South Dakota in 2024, with the Southeast and the Black Hills & Badlands leading in growth.

The Southeast also increased its share of visitor spending, increasing to 40.2% of total spending in South Dakota; up from 39.5% in 2023.

Overall South Dakota visitor spending growth was 2.8% in 2024. The Southeast was the only region to outpace the State in visitor spending growth.

South Dakota Regional Spending Timeline

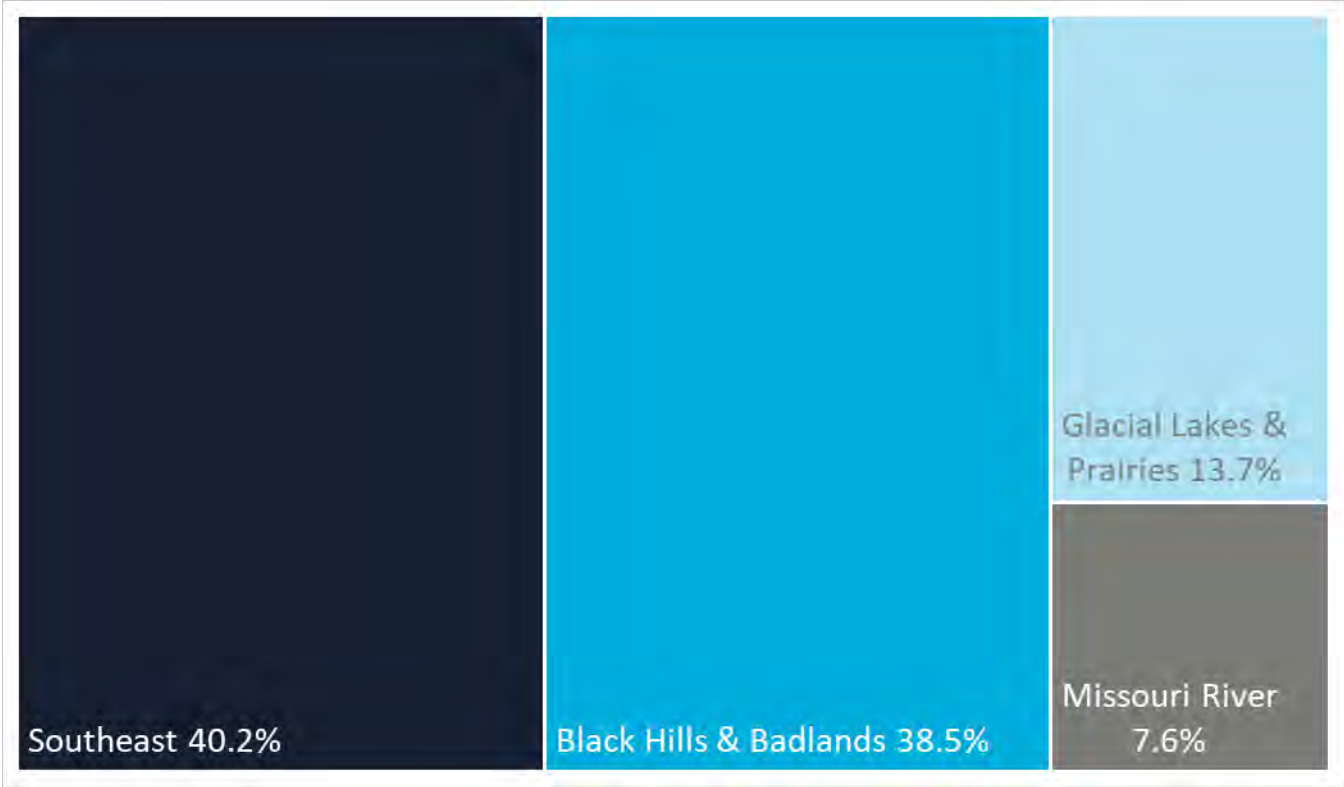
Visitor Spending Shares, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth	Share of State
South Dakota	\$3,343.9	\$4,359.6	\$4,728.8	\$4,962.6	\$5,099.4	2.8%	100.0%
Black Hills & Badlands	\$1,355.1	\$1,852.8	\$1,813.1	\$1,917.5	\$1,963.9	2.4%	38.5%
Glacial Lakes & Prairies	\$502.8	\$593.0	\$678.2	\$699.2	\$700.5	0.2%	13.7%
Missouri River	\$276.9	\$327.6	\$374.8	\$386.0	\$386.9	0.2%	7.6%
Southeast	\$1,209.0	\$1,586.1	\$1,862.7	\$1,959.9	\$2,048.0	4.5%	40.2%

Source: Tourism Economics

South Dakota Regional Spending Shares

Visitor Spending Shares



Source: Tourism Economics



Black Hills & Badlands Visitor Spending

- The Black Hill & Badlands is the second largest region of the State by visitor spending, constituting 38.5% of visitor spending.
- Visitor spending growth in the region trailed the statewide growth rate slightly, growing 2.4% in 2024, compared to the statewide 2.8% growth.
- Pennington and Lawrence Counties made up the vast majority of visitor spending in the region, encompassing over 80%.
- Tourism supported jobs made up over 10% of the employment of Fall River, Jackson, Jones, and Pennington Counties and over 20% for Custer and Lawrence Counties.

Black Hills & Badlands Visitor Spending Timeline

Amounts in \$ millions, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth	Share of Region	Share of State
Black Hills & Badlands	\$1,355.1	\$1,852.8	\$1,813.1	\$1,917.5	\$1,963.9	2.4%	100.0%	38.5%
State Total	\$3,343.4	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	2.8%		100.0%
Bennett County	\$5.3	\$6.3	\$6.7	\$7.1	\$7.3	3.0%	0.4%	0.1%
Butte County	\$19.8	\$24.0	\$24.8	\$26.6	\$26.7	0.0%	1.4%	0.5%
Custer County	\$99.7	\$133.9	\$124.1	\$136.6	\$145.2	6.2%	7.4%	2.8%
Fall River County	\$30.7	\$40.1	\$40.4	\$42.3	\$39.5	-6.7%	2.0%	0.8%
Haakon County	\$5.3	\$6.6	\$7.7	\$8.9	\$8.8	-0.5%	0.4%	0.2%
Harding County	\$2.5	\$2.7	\$3.0	\$3.0	\$2.7	-9.7%	0.1%	0.1%
Jackson County	\$19.6	\$25.4	\$23.4	\$26.9	\$28.1	4.2%	1.4%	0.6%
Jones County	\$14.1	\$17.4	\$15.8	\$16.2	\$16.0	-1.5%	0.8%	0.3%
Lawrence County	\$391.9	\$532.1	\$535.0	\$592.3	\$608.7	2.8%	31.0%	11.9%
Meade County	\$41.3	\$56.1	\$56.2	\$56.1	\$54.5	-2.9%	2.8%	1.1%
Mellette County	\$2.0	\$2.7	\$2.4	\$2.5	\$2.7	9.5%	0.1%	0.1%
Oglala Lakota County	\$17.5	\$19.2	\$22.5	\$21.3	\$19.3	-9.4%	1.0%	0.4%
Pennington County	\$692.0	\$970.2	\$933.1	\$959.4	\$985.9	2.8%	50.2%	19.3%
Perkins County	\$9.8	\$11.6	\$12.7	\$13.4	\$14.1	5.2%	0.7%	0.3%
Todd County	\$3.6	\$4.5	\$5.2	\$4.8	\$4.5	-5.8%	0.2%	0.1%

Source: Tourism Economics



Black Hills & Badlands Spending and Impacts

Black Hills & Badlands Visitor Spending

Amounts in \$ millions, and 2024 % change

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2024 growth	Total State and Local Taxes
Black Hills & Badlands	\$533.2	\$440.1	\$339.0	\$344.6	\$307.1	\$1,963.9	2.4%	\$156.2
State Total	\$1,018.4	\$1,144.5	\$776.4	\$1,070.3	\$1,089.9	\$5,099.4	2.8%	\$398.7
Bennett County	\$1.5	\$1.7	\$1.0	\$1.7	\$1.4	\$7.3	3.0%	\$0.5
Butte County	\$4.7	\$7.4	\$2.5	\$4.3	\$7.7	\$26.7	0.0%	\$2.2
Custer County	\$47.3	\$23.7	\$25.6	\$23.0	\$25.6	\$145.2	6.2%	\$11.6
Fall River County	\$9.1	\$7.9	\$6.0	\$7.6	\$8.8	\$39.5	-6.7%	\$3.0
Haakon County	\$1.0	\$1.2	\$1.0	\$3.7	\$1.9	\$8.8	-0.5%	\$0.8
Harding County	\$0.5	\$0.8	\$0.2	\$0.5	\$0.7	\$2.7	-9.7%	\$0.3
Jackson County	\$7.9	\$3.7	\$4.3	\$5.5	\$6.7	\$28.1	4.2%	\$2.0
Jones County	\$3.8	\$3.0	\$2.2	\$2.9	\$4.1	\$16.0	-1.5%	\$1.2
Lawrence County	\$207.1	\$129.9	\$128.8	\$85.4	\$57.5	\$608.7	2.8%	\$44.9
Meade County	\$10.3	\$14.1	\$5.9	\$8.9	\$15.4	\$54.5	-2.9%	\$6.6
Mellette County	\$0.5	\$0.5	\$0.4	\$0.6	\$0.7	\$2.7	9.5%	\$0.2
Oglala Lakota County	\$4.7	\$6.2	\$1.2	\$1.9	\$5.3	\$19.3	-9.4%	\$1.2
Pennington County	\$231.7	\$235.8	\$158.1	\$194.0	\$166.4	\$985.9	2.8%	\$80.1
Perkins County	\$2.5	\$3.7	\$1.6	\$4.3	\$2.0	\$14.1	5.2%	\$1.0
Todd County	\$0.6	\$0.6	\$0.2	\$0.3	\$2.8	\$4.5	-5.8%	\$0.4

Source: Tourism Economics

Black Hills & Badlands Visitor Economy Impacts

Amounts in \$ millions, number of jobs, and 2024 % share

	Employment		Share of Region	Share of State	Share of County Employment	Labor Income	
	Direct	Total				Direct	Total
Black Hills & Badlands	15,207	21,155	100.0%	36.0%		\$506.2	\$804.4
State Total	40,951	58,824		100.0%		\$1,270	\$2,242
Bennett County	75	97	0.5%	0.2%	6.4%	\$1.4	\$2.2
Butte County	226	296	1.4%	0.5%	4.9%	\$6.4	\$9.7
Custer County	792	1,238	5.9%	2.1%	23.7%	\$24.6	\$46.3
Fall River County	429	537	2.5%	0.9%	13.1%	\$12.1	\$16.6
Haakon County	56	86	0.4%	0.1%	5.1%	\$1.1	\$2.5
Harding County	22	30	0.1%	0.1%	2.6%	\$0.6	\$0.9
Jackson County	158	222	1.1%	0.4%	15.4%	\$3.9	\$5.9
Jones County	108	138	0.7%	0.2%	18.3%	\$2.8	\$4.0
Lawrence County	4,738	6,244	29.5%	10.6%	29.5%	\$173.6	\$237.9
Meade County	342	516	2.4%	0.9%	3.3%	\$10.6	\$19.0
Mellette County	31	39	0.2%	0.1%	4.6%	\$0.5	\$0.7
Oglala Lakota County	115	172	0.8%	0.3%	3.7%	\$3.6	\$5.5
Pennington County	7,927	11,269	53.3%	19.2%	12.5%	\$260.5	\$445.0
Perkins County	118	170	0.8%	0.3%	8.0%	\$2.4	\$4.6
Todd County	71	103	0.5%	0.2%	2.7%	\$2.1	\$3.4

Source: Tourism Economics

Glacial Lakes & Prairies Visitor Spending

- The Glacial Lakes & Prairies contained a total of 13.7% of statewide visitor spending in 2024.
- Visitor spending growth in the region trailed the statewide growth rate, growing 0.2% in 2024, compared to the statewide 2.8% growth.
- Brookings, Brown, and Codington Counties made up the majority of visitor spending in the region, encompassing over 60%.
- While many counties contribute a relatively small portion of the region’s visitor spending, tourism supported employees can make up a substantial portion of a county’s workforce. For example, tourism supported jobs made up over 10% of total Day County employment.

Glacial Lakes & Prairies Visitor Spending Timeline

Amounts in \$ millions, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth	Share of Region	Share of State
Glacial Lakes & Prairies	\$502.8	\$593.0	\$678.2	\$699.2	\$700.5	0.2%	100.0%	13.7%
State Total	\$3,343.4	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	2.8%		100.0%
Beadle County	\$35.6	\$46.1	\$52.1	\$51.7	\$44.6	-13.6%	6.4%	0.9%
Brookings County	\$79.7	\$92.8	\$115.0	\$124.7	\$127.1	2.0%	18.1%	2.5%
Brown County	\$149.0	\$176.4	\$200.0	\$199.9	\$199.8	-0.1%	28.5%	3.9%
Clark County	\$4.5	\$5.5	\$5.7	\$5.7	\$6.1	6.8%	0.9%	0.1%
Codington County	\$82.0	\$91.0	\$105.6	\$109.3	\$112.7	3.1%	16.1%	2.2%
Day County	\$20.3	\$23.4	\$26.4	\$26.4	\$28.0	6.0%	4.0%	0.5%
Deuel County	\$9.9	\$11.6	\$11.2	\$12.4	\$13.3	7.1%	1.9%	0.3%
Edmunds County	\$6.4	\$8.9	\$9.6	\$9.9	\$9.1	-7.9%	1.3%	0.2%
Faulk County	\$4.2	\$4.7	\$5.4	\$5.2	\$5.3	1.2%	0.8%	0.1%
Grant County	\$21.0	\$26.9	\$30.2	\$30.1	\$30.5	1.2%	4.4%	0.6%
Hamlin County	\$10.5	\$12.2	\$14.2	\$14.8	\$14.6	-1.1%	2.1%	0.3%
Hand County	\$4.8	\$5.6	\$6.4	\$6.7	\$6.6	-1.5%	0.9%	0.1%
Jerauld County	\$2.4	\$2.7	\$3.8	\$4.1	\$3.8	-5.8%	0.5%	0.1%
Kingsbury County	\$7.8	\$8.7	\$10.1	\$11.7	\$11.2	-3.9%	1.6%	0.2%
McPherson County	\$3.7	\$3.7	\$3.8	\$4.0	\$4.2	5.4%	0.6%	0.1%
Marshall County	\$7.8	\$8.7	\$10.1	\$11.7	\$11.5	-1.4%	1.6%	0.2%
Moody County	\$9.6	\$12.9	\$13.8	\$14.8	\$14.3	-3.6%	2.0%	0.3%
Roberts County	\$29.3	\$34.5	\$34.9	\$35.6	\$37.6	5.7%	5.4%	0.7%
Sanborn County	\$1.8	\$2.1	\$2.7	\$3.0	\$2.6	-14.9%	0.4%	0.1%
Spink County	\$12.5	\$14.6	\$17.2	\$17.4	\$17.5	0.1%	2.5%	0.3%

Source: Tourism Economics



Glacial Lakes & Prairies Spending and Impacts

Glacial Lakes & Prairies Visitor Spending

Amounts in \$ millions, and 2024 % change

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2024 growth	Total State and Local Taxes
Glacial Lakes & Prairies	\$119.9	\$157.7	\$80.9	\$174.7	\$167.5	\$700.5	0.2%	\$56.8
State Total	\$1,018.4	\$1,144.5	\$776.4	\$1,070.3	\$1,089.9	\$5,099.4	2.8%	\$398.7
Beadle County	\$6.0	\$10.4	\$6.6	\$8.7	\$12.9	\$44.6	-13.6%	\$4.2
Brookings County	\$22.4	\$37.5	\$17.8	\$24.9	\$24.6	\$127.1	2.0%	\$10.1
Brown County	\$33.2	\$39.4	\$24.5	\$63.0	\$39.8	\$199.8	-0.1%	\$15.4
Clark County	\$0.5	\$1.0	\$0.5	\$2.0	\$2.0	\$6.1	6.8%	\$0.6
Codington County	\$18.9	\$26.2	\$15.0	\$21.8	\$30.9	\$112.7	3.1%	\$8.9
Day County	\$6.2	\$7.2	\$3.0	\$6.5	\$5.1	\$28.0	6.0%	\$2.0
Deuel County	\$2.2	\$2.1	\$1.2	\$3.4	\$4.4	\$13.3	7.1%	\$1.1
Edmunds County	\$1.1	\$1.5	\$0.5	\$1.9	\$4.1	\$9.1	-7.9%	\$0.8
Faulk County	\$0.8	\$1.2	\$0.5	\$0.8	\$2.1	\$5.3	1.2%	\$0.4
Grant County	\$3.0	\$4.6	\$2.4	\$14.9	\$5.5	\$30.5	1.2%	\$2.3
Hamlin County	\$1.7	\$2.2	\$0.5	\$4.3	\$5.9	\$14.6	-1.1%	\$1.2
Hand County	\$0.9	\$1.5	\$0.8	\$2.0	\$1.4	\$6.6	-1.5%	\$0.8
Jerauld County	\$0.2	\$0.8	\$0.7	\$1.3	\$0.8	\$3.8	-5.8%	\$0.5
Kingsbury County	\$2.4	\$2.8	\$1.4	\$2.5	\$2.1	\$11.2	-3.9%	\$1.1
McPherson County	\$0.8	\$1.1	\$0.3	\$1.4	\$0.7	\$4.2	5.4%	\$0.6
Marshall County	\$2.4	\$3.0	\$0.8	\$1.1	\$4.2	\$11.5	-1.7%	\$0.8
Moody County	\$5.9	\$2.5	\$0.7	\$1.2	\$4.0	\$14.3	-3.6%	\$1.4
Roberts County	\$8.2	\$8.6	\$2.0	\$8.2	\$10.7	\$37.6	5.7%	\$2.6
Sanborn County	\$0.3	\$0.6	\$0.1	\$0.9	\$0.7	\$2.6	-14.9%	\$0.4
Spink County	\$2.7	\$3.4	\$1.7	\$4.0	\$5.6	\$17.5	0.1%	\$1.6

Source: Tourism Economics

Glacial Lakes & Prairies Visitor Economy Impacts

Amounts in \$ millions, number of jobs, and 2024 % share

	Employment		Share of Region	Share of State	Share of County Employment	Labor Income	
	Direct	Total				Direct	Total
Glacial Lakes & Prairies	6,483	9,347	100.0%	15.9%		\$158.6	\$298.0
State Total	40,951	58,824		100.0%		\$1,269.8	\$2,242.2
Beadle County	473	721	7.7%	1.2%	6.0%	\$11.4	\$24.0
Brookings County	1,441	2,032	21.7%	3.5%	7.6%	\$36.8	\$62.6
Brown County	1,879	2,642	28.3%	4.5%	9.1%	\$45.9	\$86.4
Clark County	25	42	0.5%	0.1%	1.7%	\$0.7	\$1.6
Codington County	962	1,467	15.7%	2.5%	6.3%	\$27.3	\$51.3
Day County	337	428	4.6%	0.7%	11.5%	\$7.3	\$11.2
Deuel County	76	111	1.2%	0.2%	3.6%	\$1.5	\$3.6
Edmunds County	57	85	0.9%	0.1%	3.1%	\$1.3	\$2.8
Faulk County	32	50	0.5%	0.1%	3.1%	\$0.7	\$1.7
Grant County	237	367	3.9%	0.6%	6.4%	\$6.3	\$12.7
Hamlin County	76	123	1.3%	0.2%	2.9%	\$1.8	\$4.1
Hand County	71	113	1.2%	0.2%	4.3%	\$1.2	\$3.1
Jerauld County	20	36	0.4%	0.1%	1.7%	\$0.5	\$1.3
Kingsbury County	109	162	1.7%	0.3%	4.8%	\$2.2	\$4.9
McPherson County	37	54	0.6%	0.1%	4.2%	\$0.9	\$1.7
Marshall County	74	102	1.1%	0.2%	3.6%	\$1.4	\$2.5
Moody County	113	169	1.8%	0.3%	4.4%	\$2.3	\$5.1
Roberts County	300	391	4.2%	0.7%	6.6%	\$5.5	\$9.4
Sanborn County	19	36	0.4%	0.1%	2.5%	\$0.3	\$1.1
Spink County	144	216	2.3%	0.4%	5.1%	\$3.1	\$6.7

Source: Tourism Economics

Missouri River Visitor Spending

- The Missouri River region accounted for 7.6% of visitor spending in South Dakota.
- Visitor spending growth in the region trailed the statewide growth rate, growing 0.2% in 2024, compared to the state with 2.8% growth.
- Visitor spending growth in Potter and Ziebach Counties were especially notable, both expanding 12% in 2024 mainly due to increases in lodging spending.
- Tourism supported jobs made up over 10% of the employment of Brule, Buffalo, Potter, and Walworth Counties and over 25% of employment in Lyman County.

Missouri River Visitor Spending Timeline
Amounts in \$ millions, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth	Share of Region	Share of State
Missouri River State Total	\$276.9	\$327.6	\$374.8	\$386.0	\$386.9	0.2%	100.0%	7.6%
	\$3,343.4	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	2.8%		100.0%
Aurora County	\$5.0	\$6.7	\$9.3	\$9.0	\$8.6	-4.9%	2.2%	0.2%
Brule County	\$25.8	\$33.1	\$37.2	\$36.4	\$36.2	-0.6%	9.4%	0.7%
Buffalo County	\$4.9	\$6.7	\$7.1	\$7.5	\$7.6	1.7%	2.0%	0.1%
Campbell County	\$2.6	\$3.2	\$3.1	\$3.2	\$3.2	-1.5%	0.8%	0.1%
Charles Mix County	\$22.2	\$27.5	\$30.2	\$32.3	\$31.8	-1.7%	8.2%	0.6%
Corson County	\$1.6	\$1.9	\$2.1	\$2.3	\$2.3	-1.3%	0.6%	0.0%
Dewey County	\$7.8	\$9.5	\$10.6	\$9.9	\$9.7	-2.2%	2.5%	0.2%
Gregory County	\$10.4	\$12.4	\$17.3	\$17.4	\$17.8	2.7%	4.6%	0.3%
Hughes County	\$68.0	\$79.1	\$98.1	\$97.2	\$97.1	-0.2%	25.1%	1.9%
Hyde County	\$2.0	\$2.1	\$2.4	\$2.8	\$2.8	-0.7%	0.7%	0.1%
Lyman County	\$33.3	\$39.8	\$43.9	\$48.1	\$47.9	-0.6%	12.4%	0.9%
Potter County	\$13.2	\$16.7	\$15.3	\$18.4	\$20.7	12.3%	5.3%	0.4%
Stanley County	\$21.2	\$23.1	\$26.5	\$27.9	\$27.5	-1.6%	7.1%	0.5%
Sully County	\$12.5	\$14.9	\$14.5	\$14.1	\$13.9	-1.2%	3.6%	0.3%
Tripp County	\$20.6	\$22.5	\$26.0	\$26.5	\$26.4	-0.1%	6.8%	0.5%
Walworth County	\$25.3	\$27.8	\$30.2	\$31.9	\$32.5	1.7%	8.4%	0.6%
Ziebach County	\$0.5	\$0.7	\$0.8	\$0.9	\$1.0	12.0%	0.3%	0.0%

Source: Tourism Economics



Missouri River Spending and Impacts

Missouri River Visitor Spending

Amounts in \$ millions, and 2024 % change

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2024 growth	Total State and Local Taxes
Missouri River	\$90.8	\$78.7	\$56.6	\$79.6	\$81.2	\$386.9	0.2%	\$31.7
State Total	\$1,018.4	\$1,144.5	\$776.4	\$1,070.3	\$1,089.9	\$5,099.4	2.8%	\$398.7
Aurora County	\$0.9	\$1.1	\$0.7	\$0.6	\$5.3	\$8.6	-4.9%	\$0.8
Brule County	\$7.0	\$9.1	\$4.3	\$8.9	\$6.9	\$36.2	-0.6%	\$3.0
Buffalo County	\$3.3	\$1.1	\$0.8	\$1.2	\$1.2	\$7.6	1.7%	\$0.5
Campbell County	\$0.6	\$1.0	\$0.1	\$0.8	\$0.8	\$3.2	-1.5%	\$0.3
Charles Mix County	\$10.6	\$5.0	\$3.9	\$5.1	\$7.3	\$31.8	-1.7%	\$2.4
Corson County	\$0.3	\$0.8	\$0.1	\$0.3	\$0.9	\$2.3	-1.3%	\$0.2
Dewey County	\$0.8	\$1.6	\$0.8	\$2.1	\$4.3	\$9.7	-2.2%	\$0.7
Gregory County	\$3.3	\$4.3	\$3.6	\$2.9	\$3.7	\$17.8	2.7%	\$1.8
Hughes County	\$21.5	\$22.8	\$15.8	\$18.7	\$18.3	\$97.1	-0.2%	\$8.5
Hyde County	\$0.3	\$0.4	\$0.3	\$1.2	\$0.5	\$2.8	-0.7%	\$0.3
Lyman County	\$13.2	\$6.2	\$7.5	\$11.1	\$9.8	\$47.9	-0.6%	\$3.6
Potter County	\$6.7	\$3.2	\$1.8	\$4.2	\$4.8	\$20.7	12.3%	\$1.7
Stanley County	\$6.9	\$6.3	\$4.2	\$5.6	\$4.5	\$27.5	-1.6%	\$2.0
Sully County	\$1.2	\$3.4	\$6.6	\$1.4	\$1.3	\$13.9	-1.2%	\$1.1
Tripp County	\$4.3	\$5.3	\$2.7	\$9.1	\$4.9	\$26.4	-0.1%	\$2.1
Walworth County	\$9.8	\$6.6	\$3.3	\$6.2	\$6.6	\$32.5	1.7%	\$2.5
Ziebach County	\$0.2	\$0.5	\$0.0	\$0.2	\$0.1	\$1.0	12.0%	\$0.1

Source: Tourism Economics

Missouri River Visitor Economy Impacts

Amounts in \$ millions, number of jobs, and 2024 % share

	Employment		Total Share of Region	Total Share of State	Total Share of County Employment	Labor Income	
	Direct	Total				Direct	Total
Missouri River	3,148	4,537	100.0%	7.7%		\$87.1	\$150.0
State Total	40,951	58,824		100.0%		\$1,269.8	\$2,242.2
Aurora County	41	85	1.9%	0.1%	5.1%	\$0.8	\$2.9
Brule County	288	373	8.2%	0.6%	10.9%	\$7.3	\$10.3
Buffalo County	69	89	2.0%	0.2%	11.5%	\$2.0	\$3.0
Campbell County	13	21	0.5%	0.0%	2.1%	\$0.3	\$0.7
Charles Mix County	299	422	9.3%	0.7%	7.3%	\$7.9	\$13.1
Corson County	11	18	0.4%	0.0%	1.3%	\$0.3	\$0.7
Dewey County	53	105	2.3%	0.2%	3.2%	\$1.3	\$3.5
Gregory County	161	215	4.7%	0.4%	7.2%	\$3.8	\$6.1
Hughes County	912	1,342	29.6%	2.3%	9.1%	\$25.2	\$48.4
Hyde County	21	37	0.8%	0.1%	3.8%	\$0.6	\$1.6
Lyman County	440	633	13.9%	1.1%	27.3%	\$14.0	\$20.1
Potter County	117	194	4.3%	0.3%	11.6%	\$3.1	\$6.4
Stanley County	175	224	4.9%	0.4%	9.8%	\$4.4	\$6.2
Sully County	92	112	2.5%	0.2%	7.9%	\$3.8	\$4.8
Tripp County	210	303	6.7%	0.5%	7.4%	\$5.9	\$10.4
Walworth County	238	349	7.7%	0.6%	10.7%	\$6.3	\$11.6
Ziebach County	7	12	0.3%	0.0%	1.7%	\$0.2	\$0.4

Source: Tourism Economics

Southwest Visitor Spending

- The Southwest was the largest region of the State by visitor spending, constituting 40.2% of visitor spending in 2024.
- Visitor spending growth in the region outpaced the statewide growth rate, growing 4.5% in 2024, compared to the statewide 2.8% growth; the only region to outpace the State overall.
- Minnehaha County made up the vast majority of visitor spending in the region, encompassing nearly 75%.
- Over 40% of tourism supported jobs in South Dakota are concentrated in the Southwest. Nearly 45% of tourism supported labor income in the State is generated in the Southwest as employees earned higher wages compared to the rest of the state.

Southwest Visitor Spending Timeline
Amounts in \$ millions, and 2024 % change

	2020	2021	2022	2023	2024	2024 Growth	Share of Region	Share of State
Southwest	\$1,209.0	\$1,586.1	\$1,862.7	\$1,959.9	\$2,048.0	4.5%	100.0%	40.2%
State Total	\$3,343.4	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	2.8%		100.0%
Bon Homme County	\$4.8	\$6.0	\$6.2	\$7.5	\$7.1	-4.4%	0.3%	0.1%
Clay County	\$21.4	\$29.2	\$30.9	\$34.4	\$35.4	2.8%	1.7%	0.7%
Davison County	\$85.0	\$104.7	\$111.7	\$114.6	\$118.4	3.3%	5.8%	2.3%
Douglas County	\$2.9	\$3.4	\$3.5	\$3.9	\$4.1	5.9%	0.2%	0.1%
Hanson County	\$3.8	\$4.3	\$5.2	\$6.0	\$6.3	4.2%	0.3%	0.1%
Hutchinson County	\$7.8	\$13.3	\$15.7	\$15.6	\$15.6	0.0%	0.8%	0.3%
Lake County	\$24.3	\$30.5	\$33.6	\$35.2	\$36.4	3.4%	1.8%	0.7%
Lincoln County	\$70.7	\$83.2	\$97.8	\$102.9	\$103.9	0.9%	5.1%	2.0%
McCook County	\$8.1	\$9.7	\$11.1	\$11.2	\$10.9	-2.1%	0.5%	0.2%
Miner County	\$5.4	\$6.3	\$10.1	\$9.8	\$10.0	2.2%	0.5%	0.2%
Minnehaha County	\$867.1	\$1,161.7	\$1,387.0	\$1,456.1	\$1,531.6	5.2%	74.8%	30.0%
Turner County	\$5.4	\$6.1	\$7.1	\$7.4	\$8.3	11.1%	0.4%	0.2%
Union County	\$38.4	\$50.4	\$55.2	\$58.1	\$59.4	2.3%	2.9%	1.2%
Yankton County	\$63.9	\$77.3	\$87.6	\$97.2	\$100.6	3.5%	4.9%	2.0%

Source: Tourism Economics



Southeast Spending and Impacts

Southeast Visitor Spending

Amounts in \$ millions, and 2024 % change

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2024 growth	Total State and Local Taxes
Southeast	\$274.5	\$468.1	\$299.8	\$471.4	\$534.2	\$2,048.0	4.5%	\$154.0
State Total	\$1,018.4	\$1,144.5	\$776.4	\$1,070.3	\$1,089.9	\$5,099.4	2.8%	\$398.7
Bon Homme County	\$0.6	\$2.6	\$0.6	\$0.6	\$2.7	\$7.1	-4.4%	\$0.7
Clay County	\$5.1	\$11.3	\$2.8	\$4.1	\$12.1	\$35.4	2.8%	\$2.9
Davison County	\$22.7	\$25.4	\$18.9	\$24.4	\$26.9	\$118.4	3.3%	\$9.1
Douglas County	\$0.3	\$1.1	\$0.3	\$1.0	\$1.3	\$4.1	5.9%	\$0.4
Hanson County	\$1.3	\$1.3	\$1.0	\$1.2	\$1.5	\$6.3	4.2%	\$0.7
Hutchinson County	\$1.0	\$1.9	\$2.2	\$2.9	\$7.6	\$15.6	0.0%	\$1.4
Lake County	\$4.9	\$11.5	\$6.2	\$6.9	\$6.9	\$36.4	3.4%	\$2.9
Lincoln County	\$10.0	\$22.7	\$20.5	\$15.7	\$35.0	\$103.9	0.9%	\$10.5
McCook County	\$1.4	\$1.7	\$0.9	\$4.1	\$2.8	\$10.9	-2.1%	\$0.9
Miner County	\$2.1	\$2.1	\$0.9	\$3.0	\$2.0	\$10.0	2.2%	\$0.9
Minnehaha County	\$201.8	\$343.3	\$213.6	\$372.7	\$400.1	\$1,531.6	5.2%	\$110.3
Turner County	\$0.7	\$1.4	\$0.8	\$2.0	\$3.3	\$8.3	11.1%	\$1.0
Union County	\$8.4	\$14.2	\$14.3	\$10.3	\$12.2	\$59.4	2.3%	\$5.4
Yankton County	\$14.0	\$27.5	\$16.8	\$22.5	\$19.9	\$100.6	3.5%	\$6.8

Source: Tourism Economics

Southeast Visitor Economy Impacts

Amounts in \$ millions, number of jobs, and 2024 % share

	Employment		Share of Region	Share of State	Share of County Employment	Labor Income	
	Direct	Total				Direct	Total
Southeast	16,113	23,786	100.0%	40.4%		\$525.8	\$997.9
State Total	40,951	58,824		100.0%		\$1,269.8	\$2,242.2
Bon Homme County	70	113	0.5%	0.2%	3.6%	\$1.4	\$3.3
Clay County	355	557	2.3%	0.9%	5.9%	\$8.6	\$16.2
Davison County	1,155	1,593	6.7%	2.7%	9.4%	\$33.3	\$55.6
Douglas County	22	39	0.2%	0.1%	1.9%	\$0.3	\$1.2
Hanson County	44	69	0.3%	0.1%	4.3%	\$1.3	\$2.8
Hutchinson County	92	172	0.7%	0.3%	3.5%	\$1.6	\$5.6
Lake County	409	532	2.2%	0.9%	6.6%	\$8.9	\$15.4
Lincoln County	710	1,291	5.4%	2.2%	2.8%	\$19.4	\$58.1
McCook County	59	92	0.4%	0.2%	3.1%	\$1.2	\$2.8
Miner County	57	89	0.4%	0.2%	5.2%	\$0.8	\$2.1
Minnehaha County	11,575	16,931	71.2%	28.8%	9.2%	\$408.9	\$750.1
Turner County	63	122	0.5%	0.2%	2.6%	\$1.2	\$4.1
Union County	517	756	3.2%	1.3%	5.6%	\$14.0	\$32.4
Yankton County	985	1,430	6.0%	2.4%	8.0%	\$25.2	\$47.9

Source: Tourism Economics

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.

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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.

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