

2025

Economic Impact of Visitors in South Dakota



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Introduction

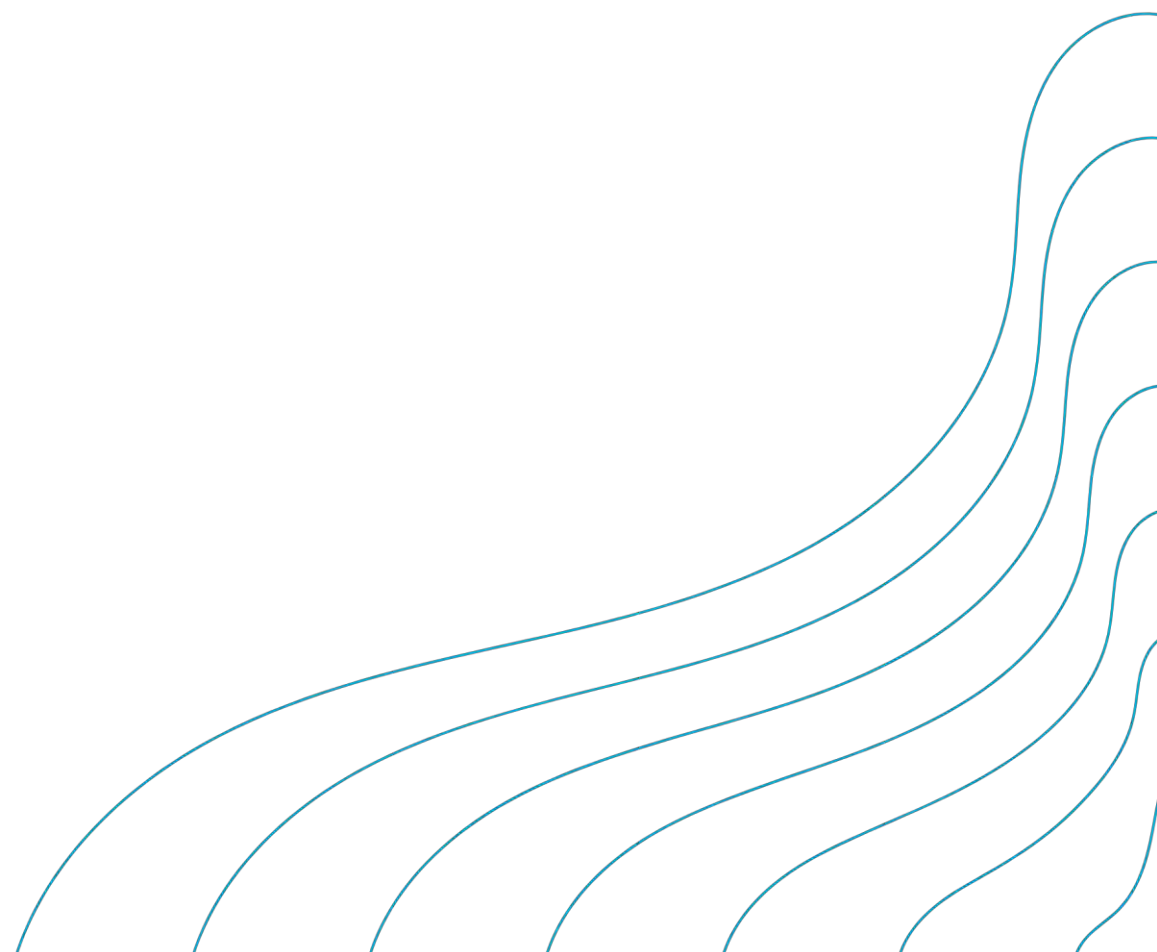
Visitors are integral to South Dakota's economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of South Dakota's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending, as well as tourism-related capital investment and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

KEY FINDINGS



Key Findings

Visitors Generate Massive Economic Impact

In 2025, 15.0 million visitors spent \$5.2 billion in the South Dakota economy, generating a total economic impact of \$8.2 billion.



15.0M VISITORS TO SOUTH DAKOTA



\$5.2B VISITOR SPENDING



\$8.2B TOTAL ECONOMIC IMPACT



\$2.3M TOTAL PERSONAL INCOME



59K TOTAL JOBS SUPPORTED



\$406M STATE AND LOCAL TAXES



Results in Context

The visitor economy is an economic pillar in South Dakota. In 2025, visitor spending supported one-in-12 jobs in South Dakota and offset resident taxes by \$1,121 per household. In addition:



\$5.2B VISITOR SPENDING

The \$5.2 billion in visitor spending means that \$15.2 million was spent every day by visitors in South Dakota, on average.



\$2.3B PERSONAL INCOME

The \$2.3 billion in total personal income generated by tourism is the equivalent of \$5,300 per household in South Dakota.



59,145 JOBS

Tourism sustained 8.7% of all jobs in South Dakota; an impact roughly equivalent, on average, to five days of visitation across all National Park sites in the state.

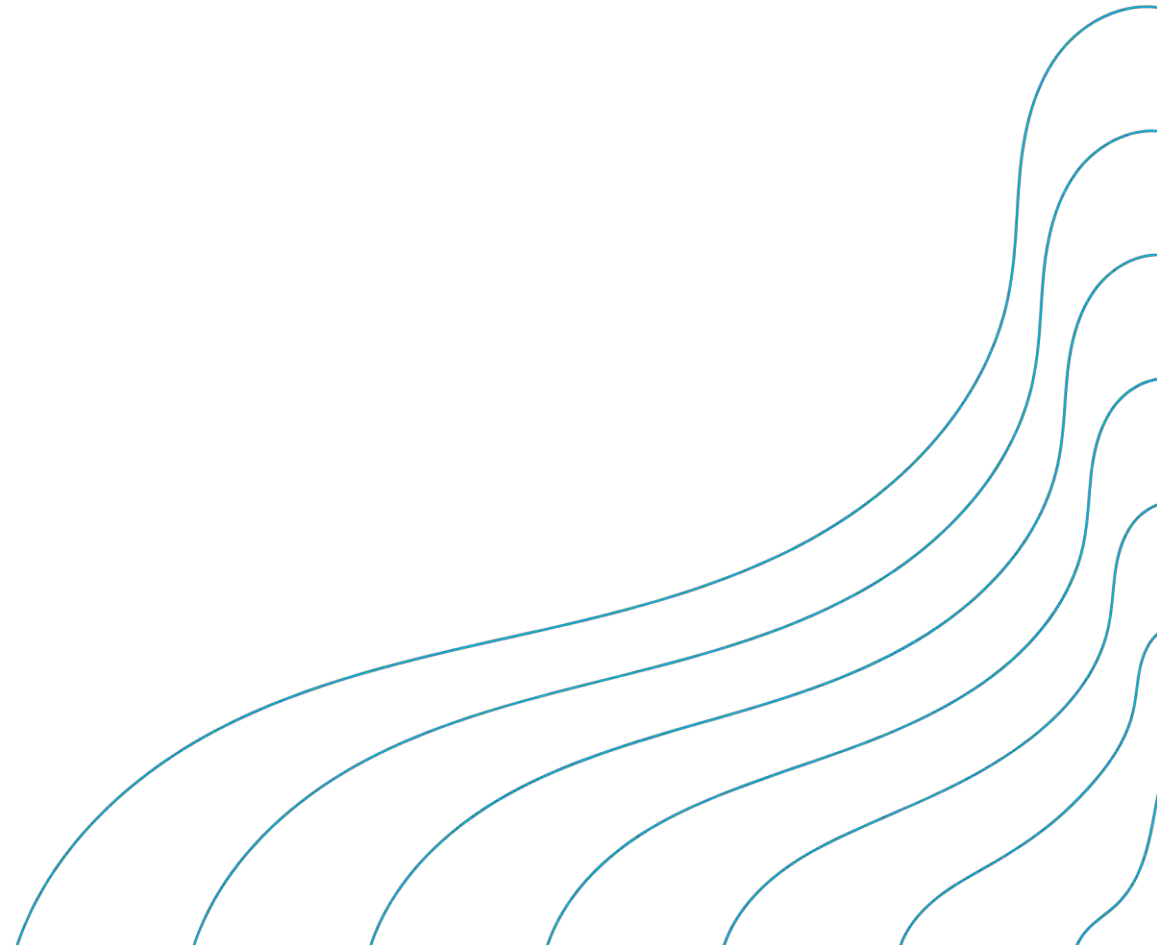


\$406M STATE & LOCAL TAXES

Each household in South Dakota would need to be taxed an additional \$1,121 to replace the visitor taxes received by the state and local governments in 2025



VISITOR VOLUME & SPENDING



South Dakota welcomed **15.0 million** visitors who spent **\$5.2 billion** in 2025.



Visitor Spending

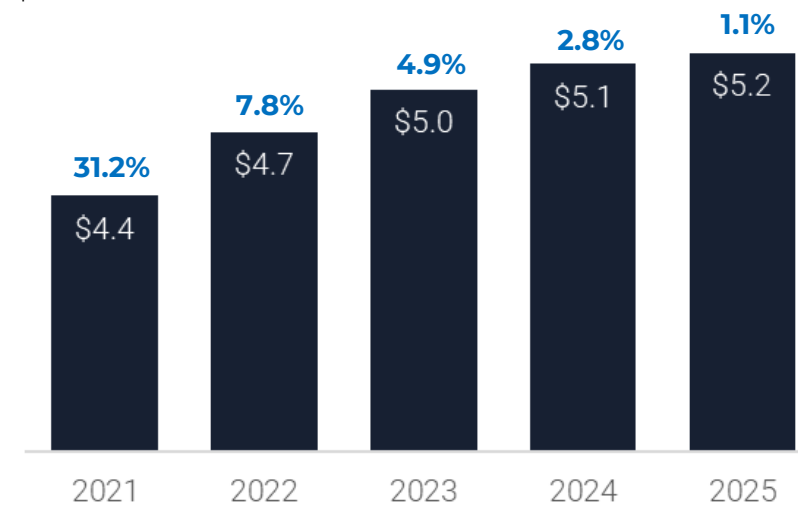
Visitors to South Dakota spent \$5.2 billion across various sectors in 2025.

Of the \$5.2 billion spent, food and beverage accounted for \$1.2 billion—23% of all visitor spending.

Visitor spending on transportation, including both air transport and ground transport within the destination, totaled \$1.1 billion and was equivalent to 21% of all visitor spending.

South Dakota Visitor Spending

\$ millions

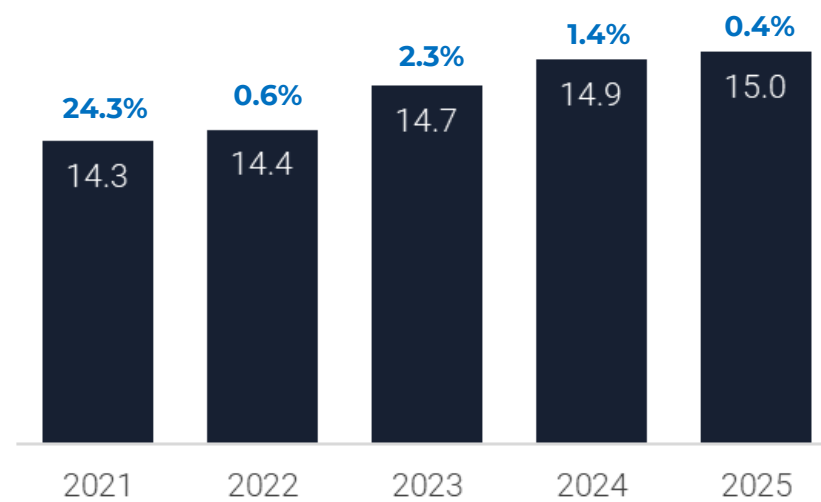


Visitor Volume

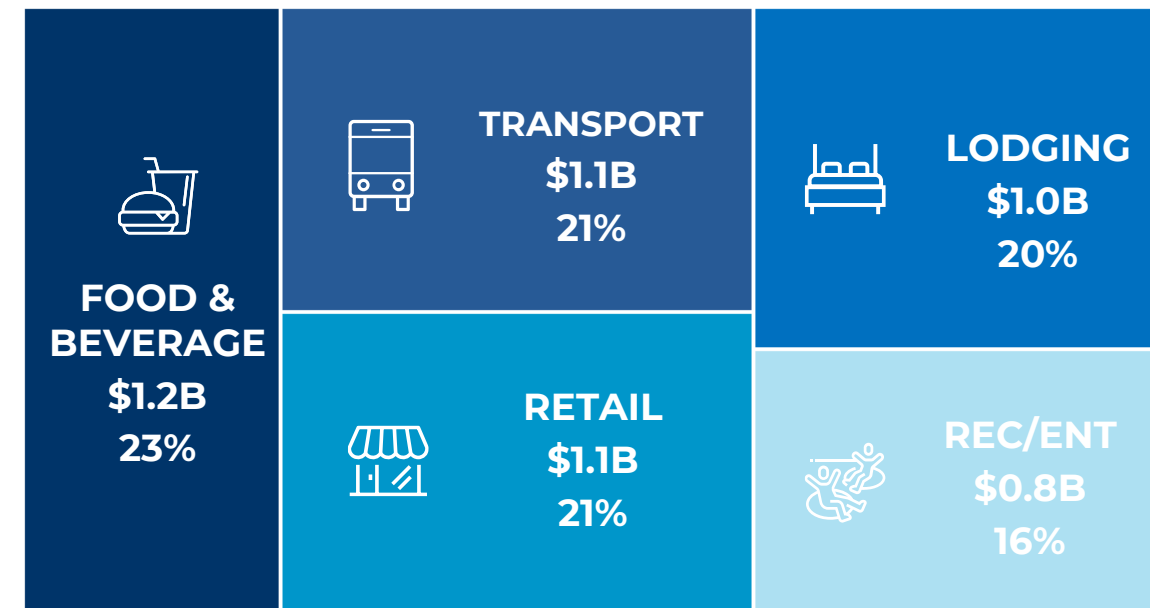
In 2025, 15.0 million visitors traveled to South Dakota, a 0.4% increase over the prior year. Growth was buoyed by day visitor volume growth, while the international and overnight markets declined year-over-year.

South Dakota Visitor Volume

millions



Source: Tourism Economics



Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.

Visitor Spending Trends

Visitor spending in South Dakota increased 1.1% year-over-year to \$5.2 billion in 2025.

Recreation led spending growth in 2025, increasing 4.0% year-over-year. Growth in food and beverage purchases followed, increasing 2.4%.

Lodging spending expanded 1.7% in 2025. Year-over-year spending growth was aided by increases in hotel room rates, while lodging demand decreased slightly in 2025.

Retail and transportation spending exhibited declines of 0.3% and 1.7%, respectively.

South Dakota Visitor Spending

\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	\$4,387	\$4,730	\$4,963	\$5,099	\$5,158	1.1%
Food & beverage	\$1,014	\$1,064	\$1,102	\$1,144	\$1,172	2.4%
Transportation	\$902	\$1,040	\$1,101	\$1,090	\$1,075	-1.3%
Retail	\$914	\$1,008	\$1,043	\$1,070	\$1,067	-0.3%
Lodging	\$888	\$898	\$966	\$1,018	\$1,036	1.7%
Recreation	\$669	\$720	\$751	\$776	\$807	4.0%

Source: Tourism Economics

Note: Lodging includes all accommodation types, and transportation includes both ground and air transportation.



Visitor Economy Trends

The visitor economy covers 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 2025 reached \$5.5 billion, of which domestic traveler spending accounted for the majority at \$5.1 billion. Capital investment in support of tourism totaled \$264 million in 2025.

Tourism Capital Investment

\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total Tourism CAPEX	\$219	\$239	\$228	\$240	\$264	9.6%
Machinery & equip.	\$125	\$137	\$144	\$164	\$165	0.3%
Construction	\$94	\$103	\$84	\$76	\$99	30.0%

Sources: Tourism Economics, Oxford Economics

Visitor Economy Distribution

In South Dakota, the international visitor market's share of tourism demand declined in 2025; overall, international visitor spending decreased 6.8% year-over-year.

Capital investment (CAPEX) in tourism-related construction and machinery & equipment represented 4.8% of all tourism-related demand.

Domestic visitor markets remained the largest category, accounting for 91.6% of demand in 2025.

The share of government support was 1.7% of the South Dakota visitor economy in 2025.

South Dakota Visitor Economy

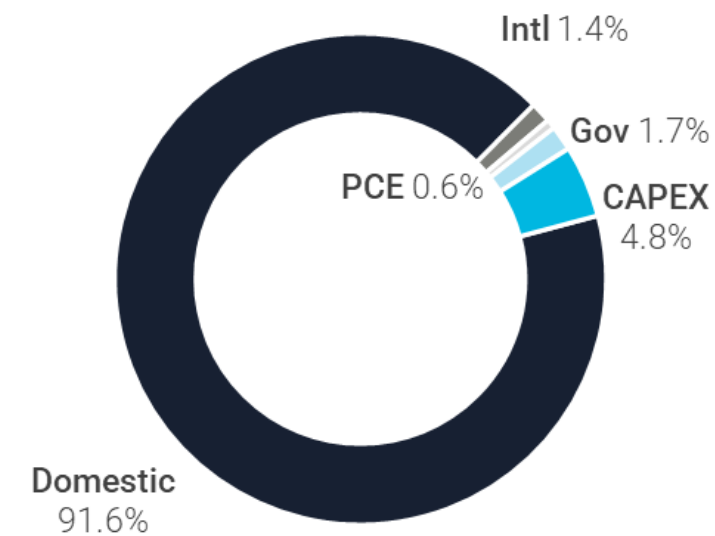
\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Tourism Demand	\$4,698	\$5,079	\$5,312	\$5,464	\$5,547	1.5%
Domestic Visitor	\$4,365	\$4,692	\$4,893	\$5,019	\$5,083	1.3%
International Visitor	\$22	\$37	\$70	\$81	\$75	-6.8%
Non-visitor PCE	\$24	\$27	\$32	\$33	\$35	3.6%
Governmental Support	\$68	\$82	\$89	\$91	\$92	0.9%
Capital Investment	\$219	\$239	\$228	\$240	\$264	9.6%

Sources: Tourism Economics, Oxford Economics

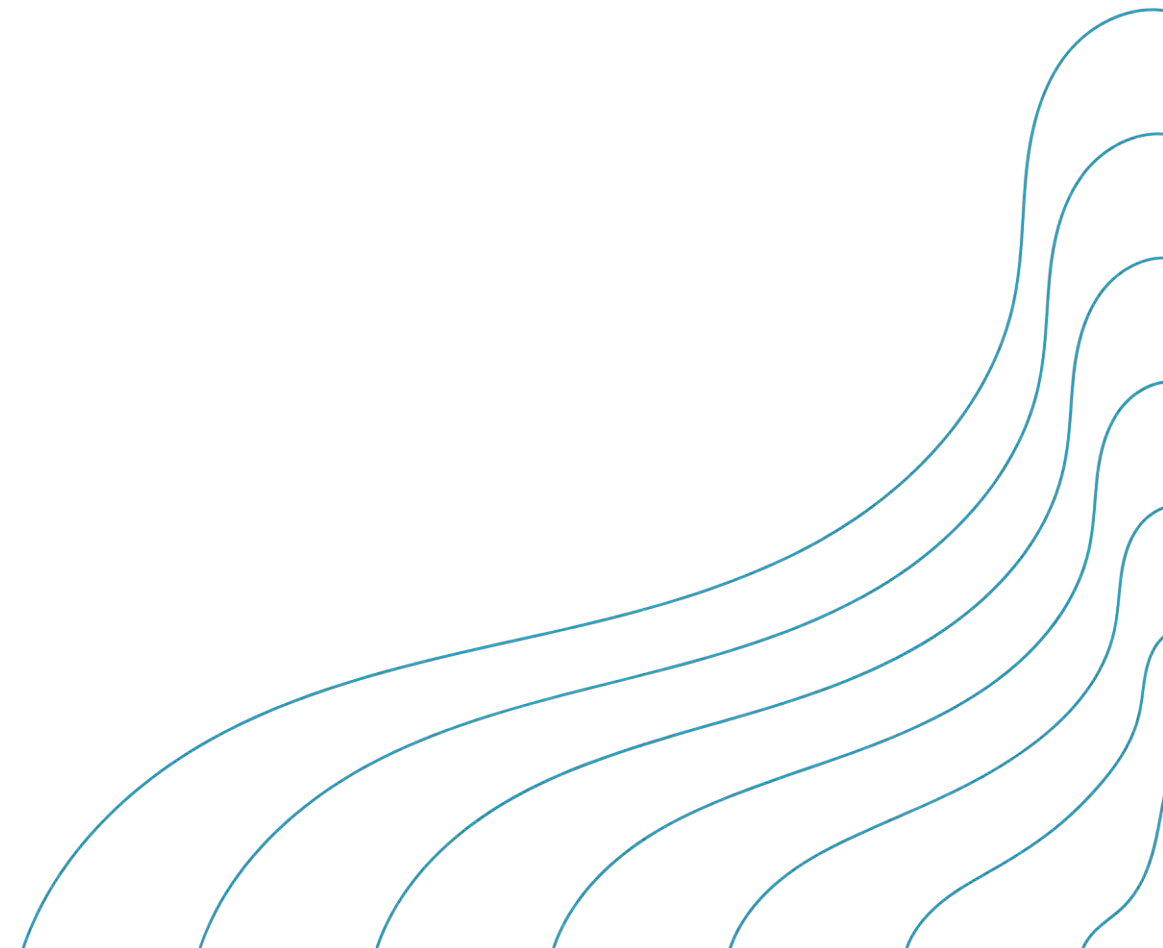
South Dakota Visitor Economy

% of total tourism demand



Sources: Tourism Economics, Oxford Economics

ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

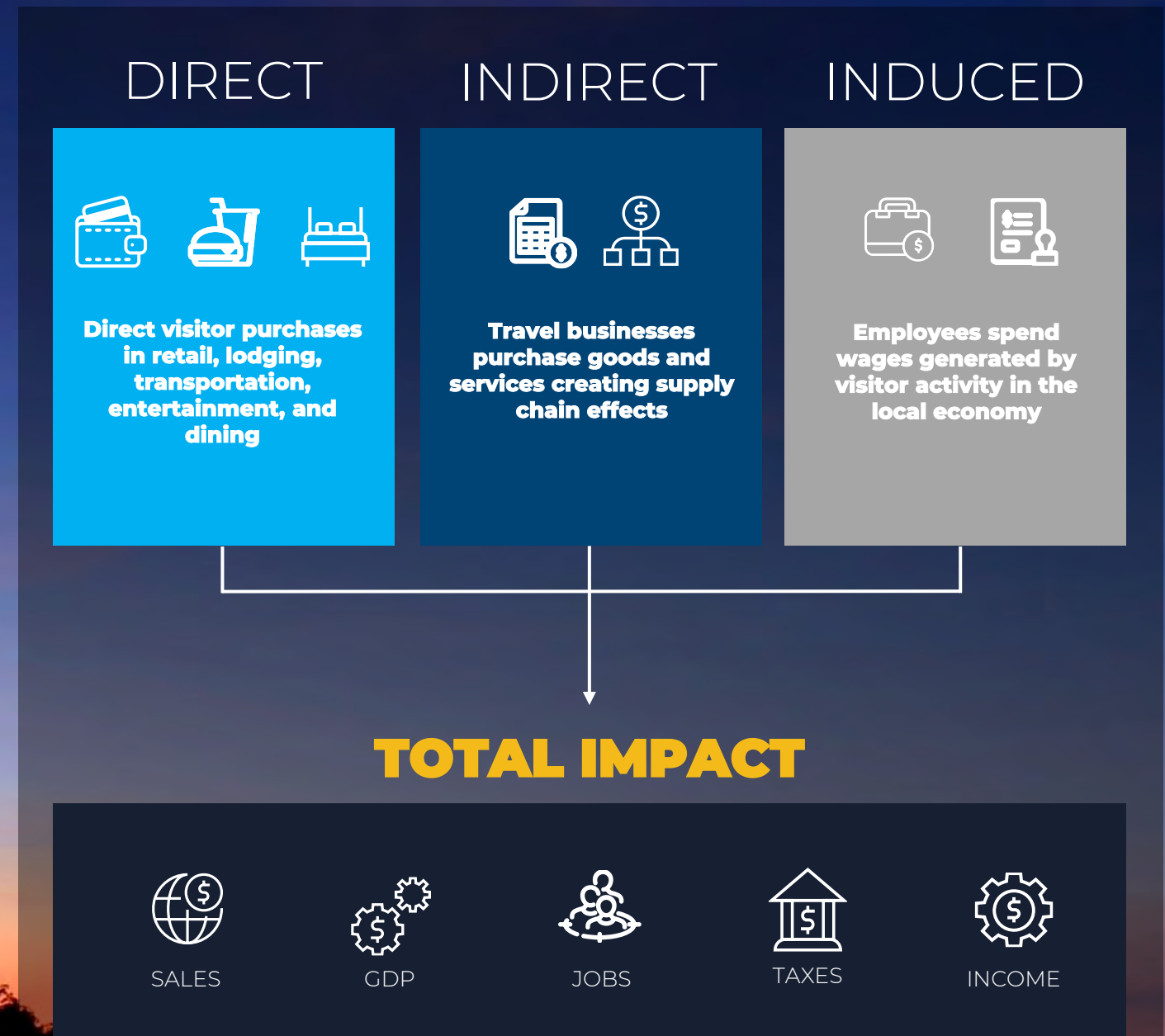
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitors through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

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

Economic Impact Model

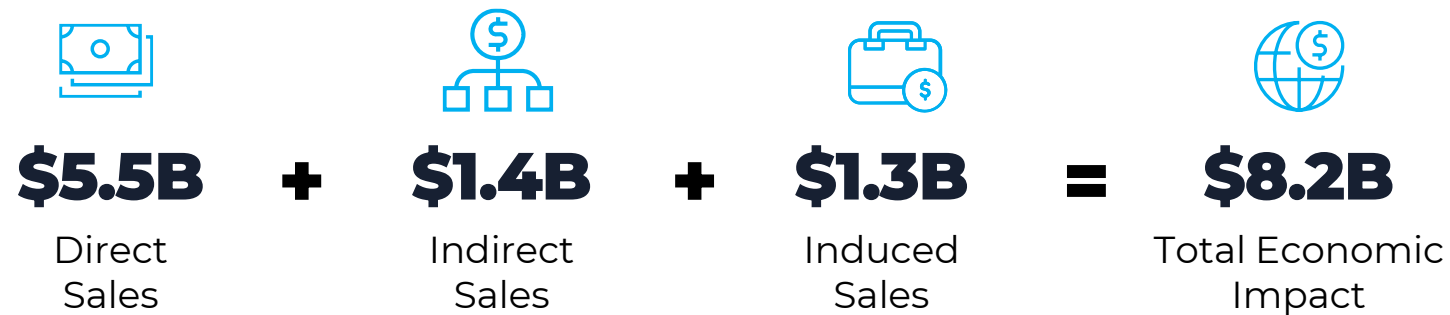


ECONOMIC IMPACT



Business Sales Impacts

Direct business sales, including visitor spending and capital expenditures in support of tourism spending, tallied \$5.5 billion in South Dakota in 2025. These direct impacts generated an additional \$2.7 billion through supply chain (indirect) and income (induced) effects. As a result, the total economic impact of the visitor economy reached \$8.2 billion in 2025.



Business Sales by Industry (2025)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$5,547	\$1,384	\$1,312	\$8,243
Food & Beverage	\$1,172	\$62	\$108	\$1,342
Retail Trade	\$1,099	\$27	\$97	\$1,222
Finance, Insurance, Real Estate	\$155	\$447	\$389	\$991
Lodging	\$970	\$0	\$1	\$972
Gasoline Stations	\$806	\$1	\$8	\$815
Recreation and Entertainment	\$698	\$44	\$27	\$770
Construction and Utilities	\$264	\$124	\$41	\$428
Business Services	\$16	\$277	\$85	\$377
Education and Health Care		\$5	\$308	\$313
Personal Services	\$93	\$44	\$73	\$210
Other Transport	\$88	\$57	\$23	\$169
Wholesale Trade		\$97	\$65	\$162
Government	\$92	\$42	\$24	\$157
Communications		\$80	\$38	\$117
Air Transport	\$93	\$2	\$3	\$97
Manufacturing	\$3	\$56	\$15	\$73
Agriculture, Fishing, Mining		\$20	\$8	\$28

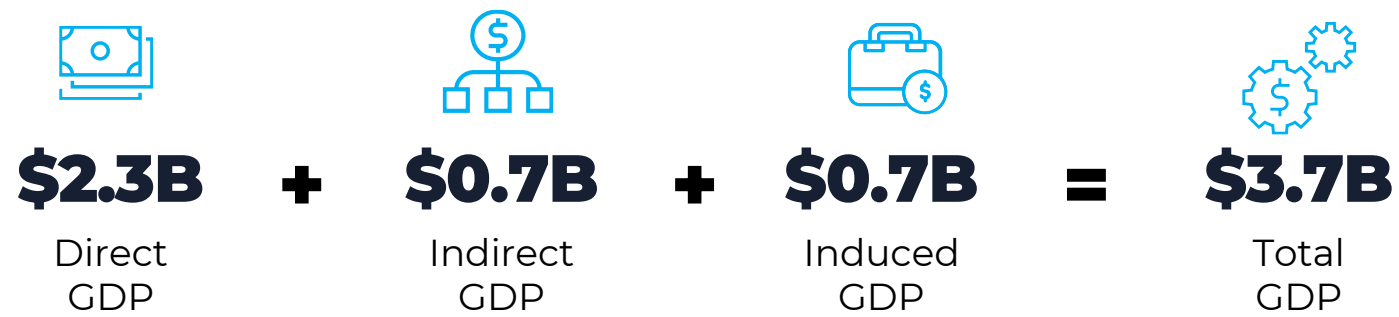
Source: Tourism Economics

The total economic impact of **\$8.2 billion** accrued to industries across the economy.



GDP (Value Added Impacts)

South Dakota's visitor economy GDP reached \$3.7 billion in 2025. This represented 4.7% of South Dakota's economy. GDP removes the value of all imported (from other states and internationally) goods and services (e.g., a hotel purchases materials such as linens from outside the State of South Dakota).

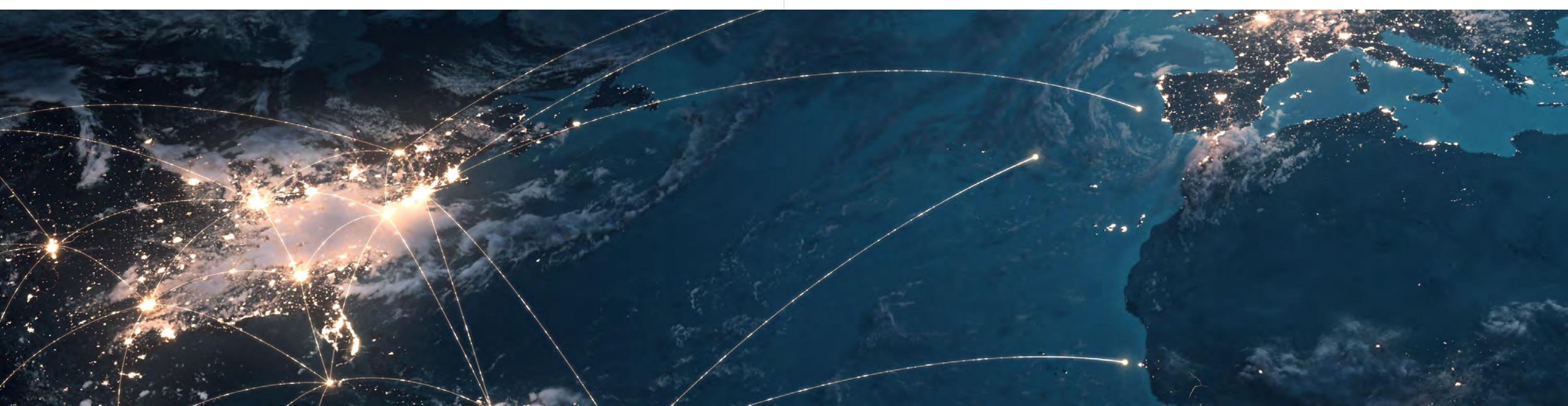


GDP by Industry (2025)

\$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$2,277	\$742	\$700	\$3,719
Food & Beverage	\$536	\$35	\$56	\$627
Lodging	\$603	\$1	\$2	\$606
Finance, Insurance, Real Estate	\$36	\$254	\$225	\$516
Recreation and Entertainment	\$362	\$16	\$13	\$390
Retail Trade	\$288	\$22	\$56	\$366
Business Services	\$8	\$168	\$44	\$220
Construction and Utilities	\$135	\$52	\$16	\$202
Education and Health Care		\$2	\$170	\$172
Personal Services	\$62	\$30	\$39	\$131
Gasoline Stations	\$118	\$1	\$4	\$124
Wholesale Trade		\$57	\$35	\$92
Other Transport	\$39	\$31	\$10	\$80
Government	\$50	\$11	\$3	\$64
Communications		\$36	\$19	\$55
Air Transport	\$37	\$1	\$1	\$39
Manufacturing	\$2	\$20	\$4	\$26
Agriculture, Fishing, Mining		\$7	\$3	\$10

Source: Tourism Economics

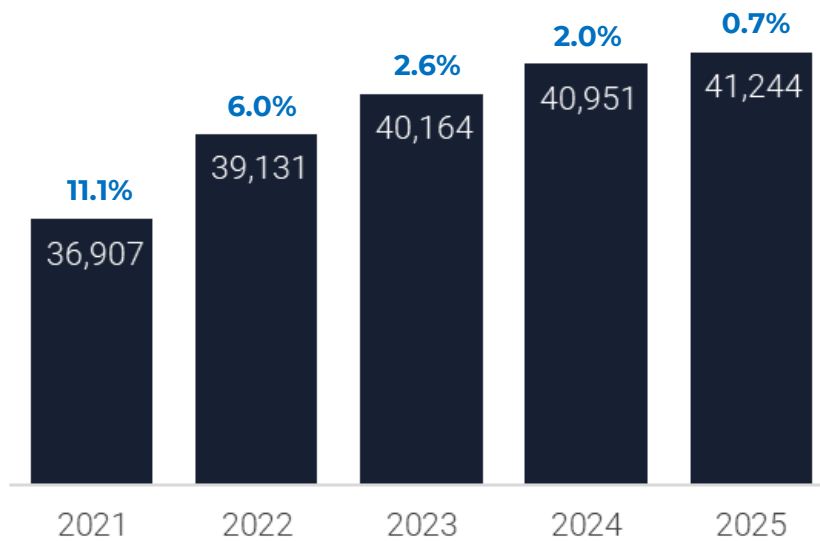


Direct Employment

Employment directly supported by visitor activity increased 0.7% in 2025, reaching 41,244 jobs. Visitor-supported employment is a significant part of several industries in South Dakota—nearly all of lodging employment, 62.2% of recreation employment, and 35.8% of food and beverage jobs were supported by visitor spending in 2025.

Visitor-Supported Employment in South Dakota

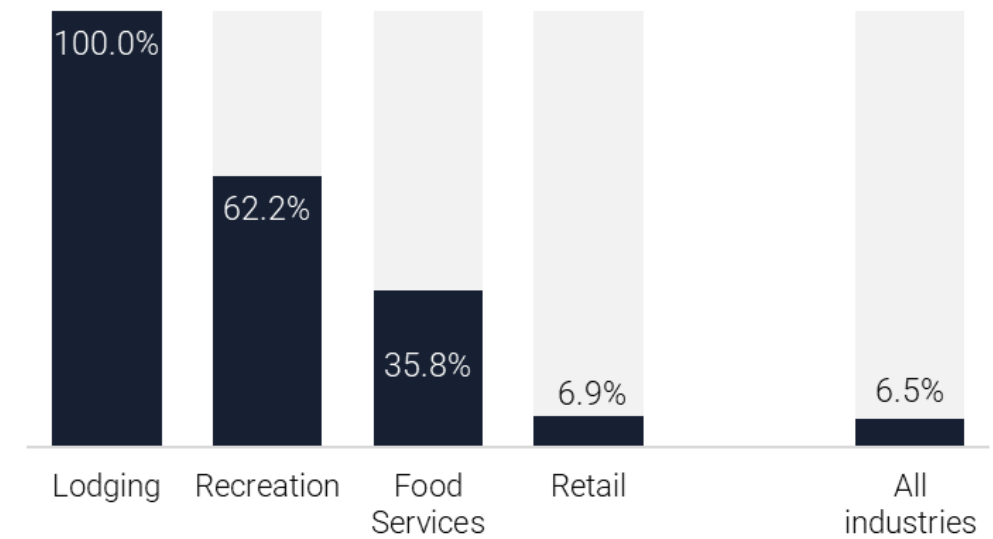
jobs



Source: Tourism Economics

Tourism Employment Intensity

share of total industry employment



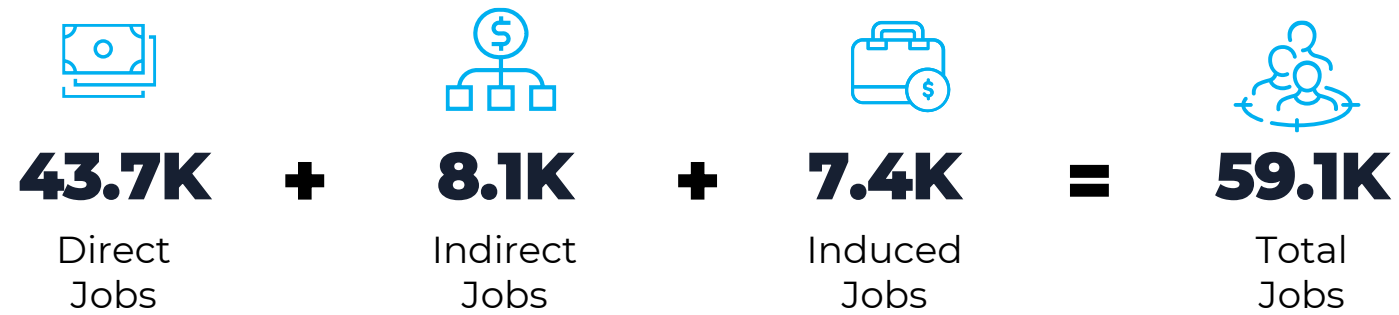
Source: Tourism Economics

Visitor activity in South Dakota directly supported over **41,000 local jobs.**



Employment Impacts

The visitor economy sustained 43,669 direct jobs in 2025, with an additional 15,477 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 59,145 in 2025, translating to one-in-12 (8.7%) jobs in the state.



Employment by Industry (2025)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	43,669	8,125	7,352	59,145
Food & Beverage	14,182	897	1,147	16,226
Recreation and Entertainment	9,064	479	266	9,809
Lodging	8,693	1	10	8,703
Retail Trade	4,803	264	933	6,000
Finance, Insurance, Real Estate	438	1,933	935	3,306
Personal Services	1,614	400	747	2,762
Business Services	72	2,063	546	2,680
Construction and Utilities	1,702	356	92	2,151
Education and Health Care		71	2,021	2,092
Other Transport	1,028	630	201	1,859
Gasoline Stations	1,094	8	65	1,168
Government	664	211	73	948
Wholesale Trade		307	160	467
Communications		242	90	332
Manufacturing	58	188	36	282
Air Transport	255	3	4	262
Agriculture, Fishing, Mining		73	25	98

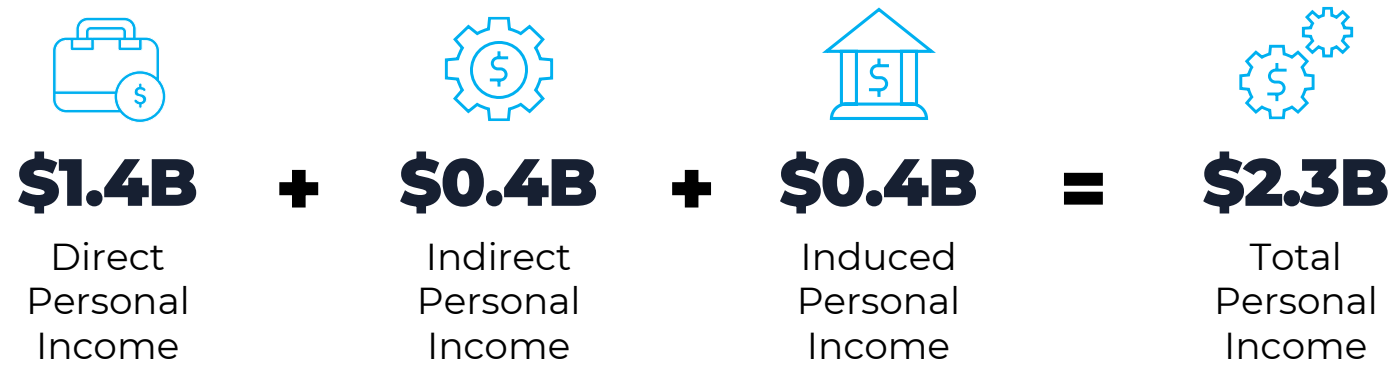
Source: Tourism Economics

Visitor spending supports **one-in-12 jobs** in South Dakota, including over **16,000 jobs** in the food and beverage industry.



Personal Income Impacts

Visitor activity generated \$1.4 billion in direct personal income in 2025. Including indirect and induced impacts, employees received \$2.3 billion in personal income. Total visitor-generated income in South Dakota increased 1.8% in 2025.



Personal Income by Industry (2025)

\$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$1,446	\$447	\$390	\$2,283
Food & Beverage	\$357	\$24	\$30	\$410
Lodging	\$323	\$0	\$0	\$323
Recreation and Entertainment	\$226	\$10	\$7	\$243
Retail Trade	\$179	\$11	\$37	\$227
Business Services	\$5	\$136	\$34	\$175
Finance, Insurance, Real Estate	\$15	\$104	\$48	\$167
Construction and Utilities	\$117	\$29	\$8	\$153
Education and Health Care		\$2	\$148	\$150
Personal Services	\$77	\$21	\$34	\$132
Other Transport	\$45	\$29	\$9	\$83
Government	\$38	\$17	\$5	\$60
Gasoline Stations	\$43	\$0	\$2	\$46
Wholesale Trade		\$27	\$15	\$43
Communications		\$17	\$7	\$24
Air Transport	\$21	\$1	\$1	\$22
Manufacturing	\$2	\$13	\$3	\$17
Agriculture, Fishing, Mining		\$5	\$2	\$7

Source: Tourism Economics



Tax Impacts

Visitor activity generated \$885.6 million in government revenues in 2025.

State and local taxes alone tallied \$406.1 million in 2025.

Each household in South Dakota would need to be taxed an additional \$1,121 to replace the visitor-generated taxes received by state and local governments in 2025.

Including indirect and induced impacts, South Dakota's visitor economy generated a total of \$194.6 million in state and local sales tax revenue in 2025, while visitors to South Dakota directly contributed \$121.8 million to the \$194.6 million total.

Of the \$121.8 million in sales tax revenues generated by visitors to South Dakota in 2025, domestic out-of-state visitors accounted for the largest share: \$93.2 million (76.6%). In-state visitors contributed \$26.7 million, and international visitors added \$1.8 million to state and local collections in 2025.



The visitor economy generated nearly **\$886 million in government revenue** in 2025.

Tax Impacts

\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total Tax Revenues	\$723.3	\$795.2	\$838.4	\$870.0	\$885.6	1.8%
Federal Taxes	\$378.8	\$434.3	\$454.5	\$471.3	\$479.5	1.7%
Personal Income	\$127.8	\$148.5	\$156.2	\$162.3	\$165.3	1.8%
Corporate	\$31.9	\$33.8	\$34.0	\$35.0	\$35.4	1.3%
Indirect Business	\$21.7	\$22.9	\$23.3	\$23.8	\$24.0	1.2%
Social Insurance	\$197.4	\$229.1	\$240.9	\$250.3	\$254.8	1.8%
State and Local Taxes	\$344.6	\$360.9	\$384.0	\$398.7	\$406.1	1.8%
Sales	\$170.3	\$175.2	\$187.0	\$191.7	\$194.6	1.5%
Bed Tax	\$33.3	\$33.7	\$36.2	\$38.2	\$38.9	1.8%
Corporate	\$2.1	\$2.3	\$2.7	\$2.7	\$2.8	1.3%
Social Insurance	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	1.8%
Excise and Fees	\$28.1	\$29.6	\$31.0	\$32.6	\$33.0	1.3%
Property	\$110.5	\$119.8	\$126.8	\$133.3	\$136.6	2.5%

Source: Tourism Economics

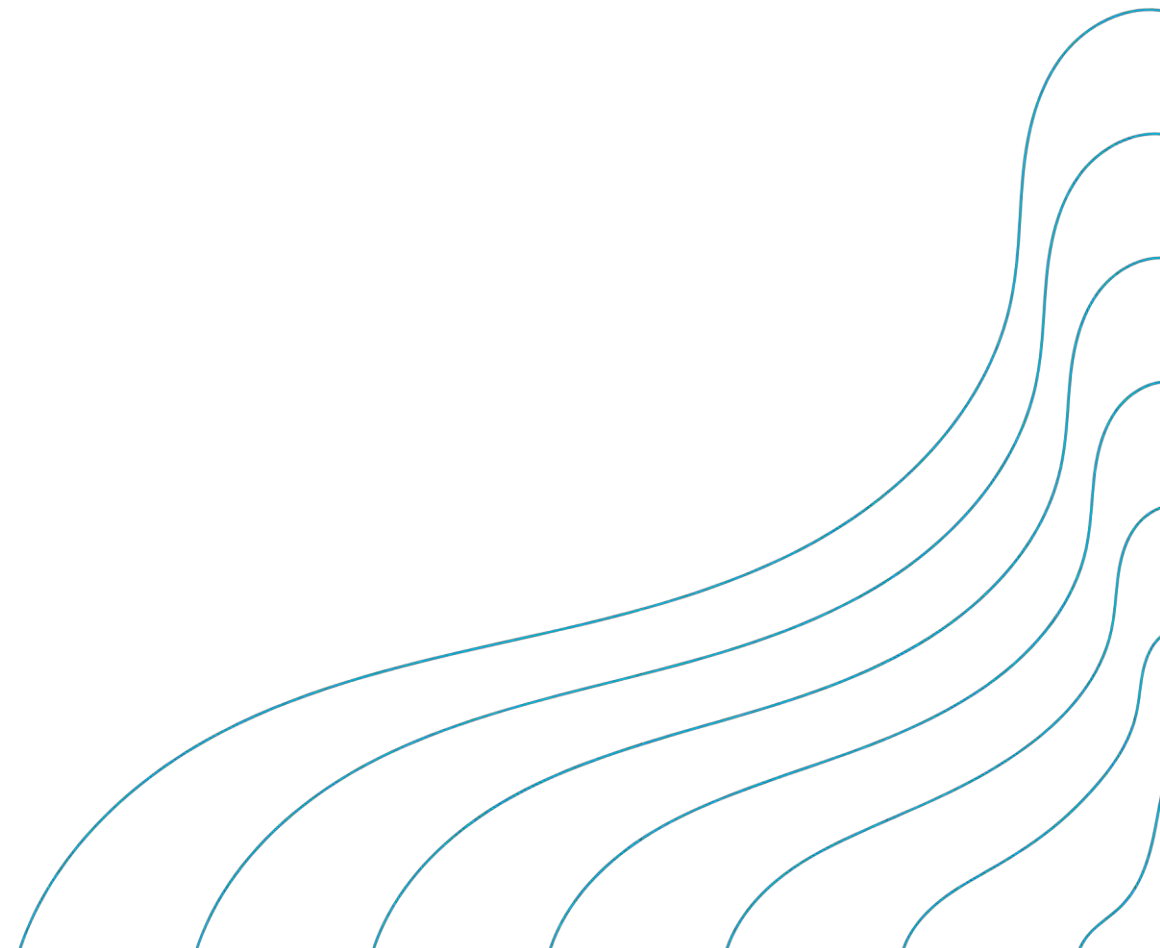
State and Local Tax Impacts

\$ millions

	2021	2022	2023	2024	2025	2025 Growth
Total State & Local	\$344.6	\$360.9	\$384.0	\$398.7	\$406.1	1.8%
State Taxes	\$160.3	\$167.2	\$178.3	\$183.4	\$186.1	1.5%
Sales	\$135.1	\$140.2	\$150.4	\$154.1	\$156.5	1.5%
Corporate	\$2.1	\$2.3	\$2.7	\$2.7	\$2.8	1.3%
Social Insurance	\$0.2	\$0.2	\$0.2	\$0.2	\$0.2	1.8%
Excise and Fees	\$22.8	\$24.5	\$25.0	\$26.3	\$26.6	1.3%
Local Taxes	\$184.3	\$193.7	\$205.7	\$215.3	\$220.0	2.1%
Sales	\$35.1	\$35.1	\$36.6	\$37.5	\$38.1	1.5%
Bed Tax	\$33.3	\$33.7	\$36.2	\$38.2	\$38.9	1.8%
Excise and Fees	\$5.3	\$5.1	\$6.1	\$6.3	\$6.4	1.5%
Property	\$110.5	\$119.8	\$126.8	\$133.3	\$136.6	2.5%

Source: Tourism Economics

2025 COUNTY IMPACTS



South Dakota Visitor Spending by Region

Visitor spending expanded in all regions in South Dakota in 2025, which expanded 1.1% over the prior year. Statewide growth in South Dakota was driven by strong growth of 3.1% in its Glacial Lakes and Prairies Region, more than double the next-largest-growing region (Black Hills & Badlands).

The Black Hill & Badlands and Missouri River regions maintained their share of visitor spending in 2025. The Southeast decreased its share from 40.2% to 40.0%.

South Dakota Regional Spending Timeline

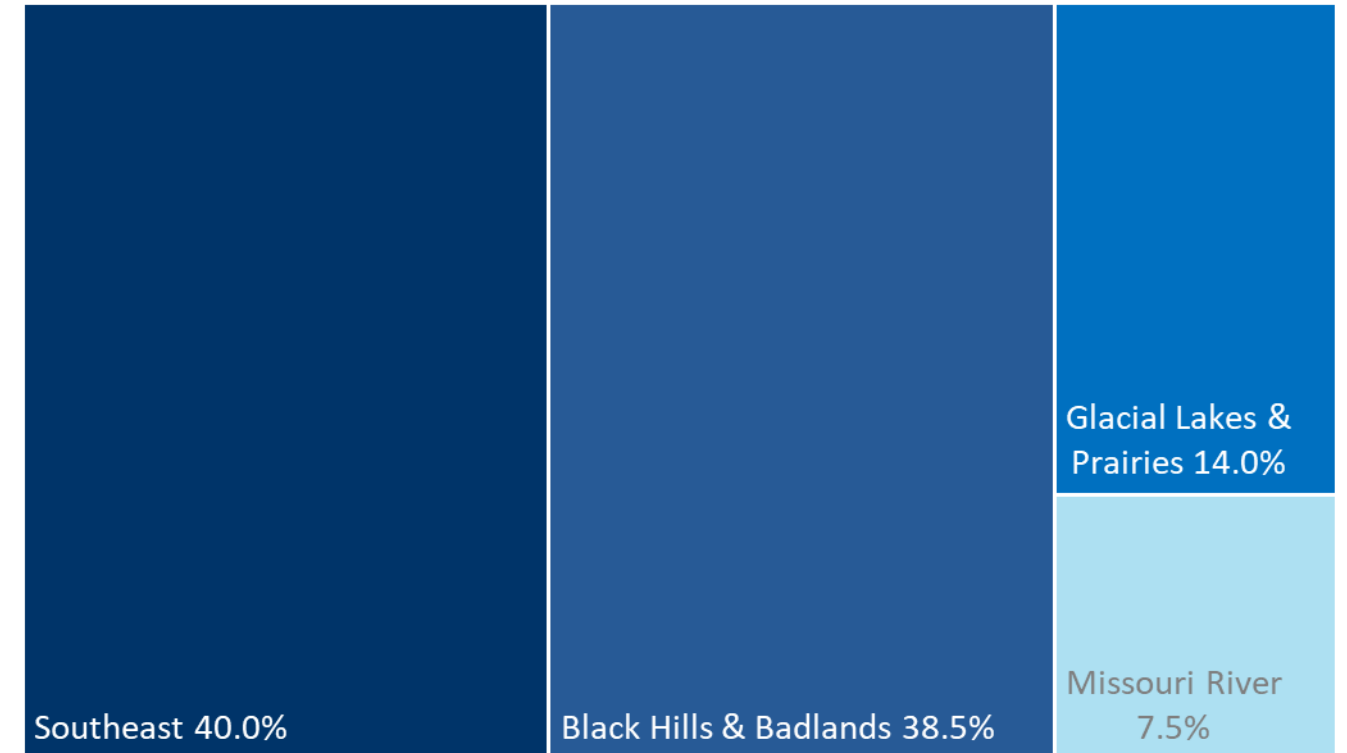
\$ millions, % share

	2021	2022	2023	2024	2025	2025 Growth	Share of State
South Dakota	\$4,359.6	\$4,728.8	\$4,962.6	\$5,099.4	\$5,157.7	1.1%	100.0%
Black Hills & Badlands	\$1,852.8	\$1,813.1	\$1,917.5	\$1,963.9	\$1,983.3	1.0%	38.5%
Glacial Lakes & Prairies	\$593.0	\$678.2	\$699.2	\$700.5	\$722.5	3.1%	14.0%
Missouri River	\$327.6	\$374.8	\$386.0	\$386.9	\$387.0	0.0%	7.5%
Southeast	\$1,586.1	\$1,862.7	\$1,959.9	\$2,048.0	\$2,064.9	0.8%	40.0%

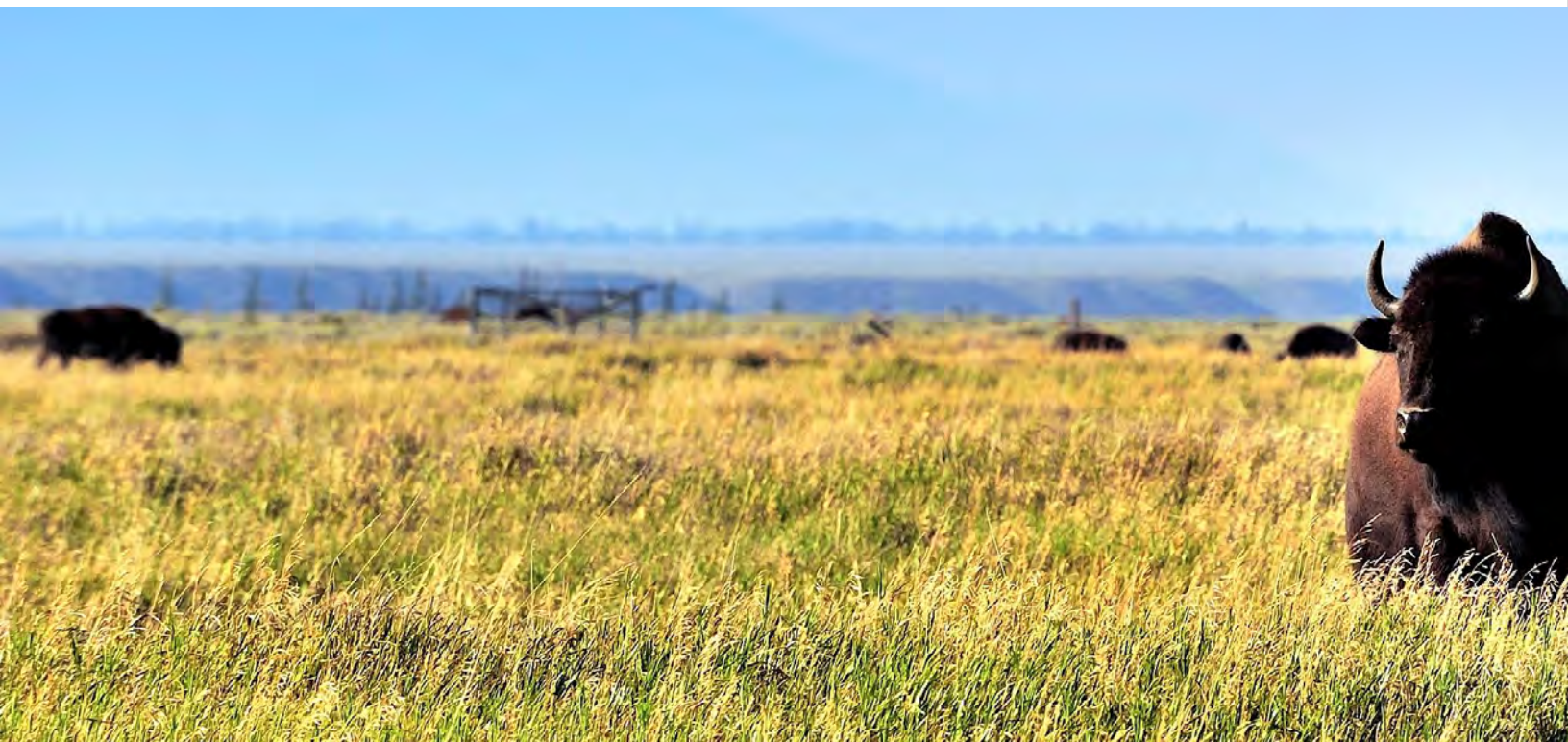
Source: Tourism Economics

South Dakota Regional Spending Shares (2025)

% shares



Source: Tourism Economics



The tourism industry in **South Dakota** consists of four regions across the state, with the **Southeast** and **Black Hills & Badlands** regions comprising of the largest share of visitor spending.

Black Hills & Badlands Visitor Spending

- The Black Hills & Badlands comprised the second largest region of the state by visitor spending, constituting 38.5% of visitor spending.
- Visitor spending growth in the region was nearly on par with the state, growing 1.0% in 2025, compared to 1.1% growth statewide.
- 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

\$ millions, % share

	2021	2022	2023	2024	2025	2025 Growth	Share of Region	Share of State
Black Hills & Badlands	\$1,852.8	\$1,813.1	\$1,917.5	\$1,963.9	\$1,983.3	1.0%	100.0%	38.5%
State Total	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	\$5,157.7	1.1%		100.0%
Bennett County	\$6.3	\$6.7	\$7.1	\$7.3	\$7.6	4.6%	0.4%	0.1%
Butte County	\$24.0	\$24.8	\$26.6	\$26.7	\$26.2	-1.7%	1.3%	0.5%
Custer County	\$133.9	\$124.1	\$136.6	\$145.2	\$146.8	1.2%	7.4%	2.8%
Fall River County	\$40.1	\$40.4	\$42.3	\$39.5	\$39.9	1.1%	2.0%	0.8%
Haakon County	\$6.6	\$7.7	\$8.9	\$8.8	\$9.0	2.2%	0.5%	0.2%
Harding County	\$2.7	\$3.0	\$3.0	\$2.7	\$2.7	1.2%	0.1%	0.1%
Jackson County	\$25.4	\$23.4	\$26.9	\$28.1	\$27.3	-2.8%	1.4%	0.5%
Jones County	\$17.4	\$15.8	\$16.2	\$16.0	\$15.1	-5.8%	0.8%	0.3%
Lawrence County	\$532.1	\$535.0	\$592.3	\$608.7	\$611.7	0.5%	30.8%	11.9%
Meade County	\$56.1	\$56.2	\$56.1	\$54.5	\$55.6	2.1%	2.8%	1.1%
Mellette County	\$2.7	\$2.4	\$2.5	\$2.7	\$2.5	-5.4%	0.1%	0.0%
Oglala Lakota County	\$19.2	\$22.5	\$21.3	\$19.3	\$20.1	3.9%	1.0%	0.4%
Pennington County	\$970.2	\$933.1	\$959.4	\$985.9	\$999.6	1.4%	50.4%	19.4%
Perkins County	\$11.6	\$12.7	\$13.4	\$14.1	\$14.2	0.3%	0.7%	0.3%
Todd County	\$4.5	\$5.2	\$4.8	\$4.5	\$5.0	9.9%	0.2%	0.1%

Source: Tourism Economics



Black Hills & Badlands Spending and Impacts

Black Hills & Badlands Visitor Spending (2025)

\$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2025 growth	Total State and Local Taxes
Black Hills & Badlands	\$538.6	\$451.6	\$349.2	\$346.3	\$297.7	\$1,983.3	1.0%	\$151.9
State Total	\$1,036.2	\$1,172.1	\$807.4	\$1,066.7	\$1,075.2	\$5,157.7	1.1%	\$406.1
Bennett County	\$1.6	\$1.9	\$1.0	\$1.7	\$1.4	\$7.6	4.6%	\$0.6
Butte County	\$4.5	\$7.7	\$2.5	\$4.3	\$7.2	\$26.2	-1.7%	\$2.2
Custer County	\$47.9	\$25.0	\$26.0	\$22.5	\$25.4	\$146.8	1.2%	\$11.0
Fall River County	\$9.2	\$8.5	\$6.4	\$7.4	\$8.4	\$39.9	1.1%	\$3.1
Haakon County	\$1.1	\$1.2	\$1.0	\$3.7	\$1.9	\$9.0	2.2%	\$0.8
Harding County	\$0.5	\$0.8	\$0.2	\$0.5	\$0.7	\$2.7	1.2%	\$0.3
Jackson County	\$7.7	\$3.7	\$4.2	\$5.4	\$6.4	\$27.3	-2.8%	\$1.9
Jones County	\$3.5	\$2.8	\$2.2	\$2.6	\$4.0	\$15.1	-5.8%	\$1.1
Lawrence County	\$204.2	\$130.2	\$134.2	\$85.7	\$57.3	\$611.7	0.5%	\$41.1
Meade County	\$10.9	\$14.7	\$5.9	\$9.0	\$15.1	\$55.6	2.1%	\$6.8
Mellette County	\$0.5	\$0.5	\$0.3	\$0.6	\$0.7	\$2.5	-5.4%	\$0.2
Oglala Lakota County	\$5.0	\$6.6	\$1.2	\$1.9	\$5.3	\$20.1	3.9%	\$1.2
Pennington County	\$238.7	\$243.7	\$161.9	\$196.4	\$158.9	\$999.6	1.4%	\$80.0
Perkins County	\$2.6	\$3.7	\$1.7	\$4.2	\$2.0	\$14.2	0.3%	\$1.1
Todd County	\$0.7	\$0.7	\$0.3	\$0.4	\$2.9	\$5.0	9.9%	\$0.5

Source: Tourism Economics

Black Hills & Badlands Visitor Economy Impacts (2025)

\$ millions, jobs, % share

	Employment		Share of Region	Share of State	Share of County Employment	Personal Income	
	Direct	Total				Direct	Total
Black Hills & Badlands	15,293	21,270	100.0%	36.0%	\$504.5	\$809.4	
State Total	41,244	59,145	100.0%	100.0%	\$1,290	\$2,283	
Bennett County	77	99	0.5%	0.2%	\$1.4	\$2.2	
Butte County	221	291	1.4%	0.5%	\$6.3	\$9.7	
Custer County	783	1,232	5.8%	2.1%	\$25.2	\$48.0	
Fall River County	439	548	2.6%	0.9%	\$11.8	\$16.4	
Haakon County	55	85	0.4%	0.1%	\$1.1	\$2.6	
Harding County	21	29	0.1%	0.0%	\$0.6	\$0.9	
Jackson County	159	223	1.0%	0.4%	\$3.8	\$5.7	
Jones County	100	129	0.6%	0.2%	\$2.7	\$3.9	
Lawrence County	4,721	6,232	29.3%	10.5%	\$169.9	\$234.6	
Meade County	343	519	2.4%	0.9%	\$10.5	\$19.2	
Mellette County	27	36	0.2%	0.1%	\$0.4	\$0.6	
Oglala Lakota County	116	174	0.8%	0.3%	\$3.7	\$5.7	
Pennington County	8,038	11,398	53.6%	19.3%	\$262.6	\$451.6	
Perkins County	119	170	0.8%	0.3%	\$2.3	\$4.4	
Todd County	73	105	0.5%	0.2%	\$2.2	\$3.6	

Source: Tourism Economics

Glacial Lakes & Prairies Visitor Spending

- The Glacial Lakes & Prairies contained a total of 14.0% of statewide visitor spending in 2025.
- Visitor spending growth in the region outpaced the state, leading with 3.1% growth.
- Brookings, Brown, and Codington Counties comprised the majority of visitor spending in the region, encompassing over 60%.
- Despite accounting for 14.0% of the state’s spending, the Glacial Lakes & Prairies region contained 15.8% of the state’s tourism-supported jobs.

Glacial Lakes & Prairies Visitor Spending Timeline

\$ millions, % share

	2021	2022	2023	2024	2025	2025 Growth	Share of Region	Share of State
Glacial Lakes & Prairies	\$593.0	\$678.2	\$699.2	\$700.5	\$722.5	3.1%	100.0%	14.0%
State Total	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	\$5,157.7	1.1%		100.0%
Beadle County	\$46.1	\$52.1	\$51.7	\$44.6	\$46.6	4.4%	6.4%	0.9%
Brookings County	\$92.8	\$115.0	\$124.7	\$127.1	\$127.6	0.4%	17.7%	2.5%
Brown County	\$176.4	\$200.0	\$199.9	\$199.8	\$218.0	9.1%	30.2%	4.2%
Clark County	\$5.5	\$5.7	\$5.7	\$6.1	\$6.1	0.3%	0.8%	0.1%
Codington County	\$91.0	\$105.6	\$109.3	\$112.7	\$111.9	-0.7%	15.5%	2.2%
Day County	\$23.4	\$26.4	\$26.4	\$28.0	\$29.0	3.5%	4.0%	0.6%
Deuel County	\$11.6	\$11.2	\$12.4	\$13.3	\$13.4	1.2%	1.9%	0.3%
Edmunds County	\$8.9	\$9.6	\$9.9	\$9.1	\$9.0	-1.0%	1.2%	0.2%
Faulk County	\$4.7	\$5.4	\$5.2	\$5.3	\$5.6	5.6%	0.8%	0.1%
Grant County	\$26.9	\$30.2	\$30.1	\$30.5	\$28.7	-5.9%	4.0%	0.6%
Hamlin County	\$12.2	\$14.2	\$14.8	\$14.6	\$14.6	-0.4%	2.0%	0.3%
Hand County	\$5.6	\$6.4	\$6.7	\$6.6	\$6.6	-0.1%	0.9%	0.1%
Jerauld County	\$2.7	\$3.8	\$4.1	\$3.8	\$4.4	14.8%	0.6%	0.1%
Kingsbury County	\$8.7	\$10.1	\$11.7	\$11.2	\$10.9	-2.8%	1.5%	0.2%
McPherson County	\$3.7	\$3.8	\$4.0	\$4.2	\$4.2	0.0%	0.6%	0.1%
Marshall County	\$8.7	\$10.1	\$11.7	\$11.5	\$11.6	0.8%	1.6%	0.2%
Moody County	\$12.9	\$13.8	\$14.8	\$14.3	\$14.4	1.2%	2.0%	0.3%
Roberts County	\$34.5	\$34.9	\$35.6	\$37.6	\$37.9	0.7%	5.2%	0.7%
Sanborn County	\$2.1	\$2.7	\$3.0	\$2.6	\$2.4	-6.1%	0.3%	0.0%
Spink County	\$14.6	\$17.2	\$17.4	\$17.5	\$19.5	11.6%	2.7%	0.4%

Source: Tourism Economics



Glacial Lakes & Prairies Spending and Impacts

Glacial Lakes & Prairies Visitor Spending (2025)

\$ millions

						Total	2025 growth	Total State and Local Taxes
	Lodging	Food and beverage	Recreation	Retail	Transportation			
Glacial Lakes & Prairies	\$129.2	\$165.3	\$85.6	\$175.0	\$167.4	\$722.5	3.1%	\$61.1
State Total	\$1,036.2	\$1,172.1	\$807.4	\$1,066.7	\$1,075.2	\$5,157.7	1.1%	\$406.1
Beadle County	\$6.8	\$11.1	\$6.8	\$8.7	\$13.2	\$46.6	4.4%	\$4.6
Brookings County	\$22.0	\$38.8	\$18.1	\$24.1	\$24.6	\$127.6	0.4%	\$10.4
Brown County	\$40.4	\$43.8	\$27.3	\$65.0	\$41.4	\$218.0	9.1%	\$17.6
Clark County	\$0.5	\$1.0	\$0.5	\$2.0	\$2.0	\$6.1	0.3%	\$0.7
Codington County	\$19.0	\$26.5	\$15.2	\$21.7	\$29.6	\$111.9	-0.7%	\$9.1
Day County	\$6.3	\$7.8	\$3.4	\$6.5	\$5.0	\$29.0	3.5%	\$2.2
Deuel County	\$2.3	\$2.1	\$1.2	\$3.4	\$4.4	\$13.4	1.2%	\$1.2
Edmunds County	\$1.2	\$1.5	\$0.5	\$1.9	\$4.0	\$9.0	-1.0%	\$0.9
Faulk County	\$1.0	\$1.3	\$0.5	\$0.8	\$2.0	\$5.6	5.6%	\$0.5
Grant County	\$2.9	\$4.7	\$2.4	\$13.7	\$4.9	\$28.7	-5.9%	\$2.4
Hamlin County	\$1.8	\$2.2	\$0.5	\$4.3	\$5.8	\$14.6	-0.4%	\$1.3
Hand County	\$0.9	\$1.5	\$0.8	\$2.0	\$1.3	\$6.6	-0.1%	\$0.8
Jerauld County	\$0.3	\$0.9	\$0.9	\$1.3	\$0.9	\$4.4	14.8%	\$0.6
Kingsbury County	\$2.4	\$2.5	\$1.4	\$2.5	\$2.1	\$10.9	-2.8%	\$1.1
McPherson County	\$0.8	\$1.2	\$0.3	\$1.4	\$0.7	\$4.2	0.0%	\$0.7
Marshall County	\$2.5	\$3.1	\$0.8	\$1.1	\$4.1	\$11.6	0.8%	\$0.9
Moody County	\$6.0	\$2.5	\$0.7	\$1.2	\$4.0	\$14.4	1.2%	\$1.3
Roberts County	\$8.4	\$8.4	\$2.0	\$8.2	\$10.8	\$37.9	0.7%	\$2.6
Sanborn County	\$0.3	\$0.6	\$0.1	\$0.8	\$0.6	\$2.4	-6.1%	\$0.4
Spink County	\$3.5	\$3.7	\$2.0	\$4.3	\$6.0	\$19.5	11.6%	\$1.9

Source: Tourism Economics

Glacial Lakes & Prairies Visitor Economy Impacts (2025)

\$ millions, jobs, % share

	Employment		Share of Region	Share of State	Share of County Employment	Personal Income	
	Direct	Total				Direct	Total
Glacial Lakes & Prairies	6,496	9,353	100.0%	15.8%		\$162.5	\$305.0
State Total	41,244	59,145	100.0%	100.0%		\$1,290.3	\$2,282.9
Beadle County	474	723	7.7%	1.2%	6.1%	\$12.2	\$25.5
Brookings County	1,445	2,040	21.8%	3.4%	7.6%	\$36.9	\$63.2
Brown County	1,951	2,717	29.1%	4.6%	9.5%	\$48.8	\$90.8
Clark County	25	42	0.4%	0.1%	1.7%	\$0.7	\$1.5
Codington County	931	1,436	15.4%	2.4%	6.2%	\$27.1	\$51.5
Day County	355	447	4.8%	0.8%	11.8%	\$7.9	\$12.0
Deuel County	75	109	1.2%	0.2%	3.6%	\$1.4	\$3.6
Edmunds County	54	82	0.9%	0.1%	2.9%	\$1.3	\$2.9
Faulk County	34	52	0.6%	0.1%	3.3%	\$0.8	\$1.8
Grant County	234	359	3.8%	0.6%	6.5%	\$6.3	\$12.5
Hamlin County	70	117	1.2%	0.2%	2.7%	\$1.7	\$4.1
Hand County	67	109	1.2%	0.2%	4.2%	\$1.2	\$3.2
Jerauld County	21	37	0.4%	0.1%	1.8%	\$0.6	\$1.5
Kingsbury County	100	149	1.6%	0.3%	4.6%	\$2.0	\$4.5
McPherson County	35	52	0.6%	0.1%	4.1%	\$0.9	\$1.7
Marshall County	71	99	1.1%	0.2%	3.6%	\$1.4	\$2.6
Moody County	109	164	1.8%	0.3%	4.3%	\$2.4	\$5.3
Roberts County	276	361	3.9%	0.6%	6.4%	\$5.0	\$8.5
Sanborn County	19	36	0.4%	0.1%	2.5%	\$0.3	\$1.2
Spink County	150	222	2.4%	0.4%	5.2%	\$3.5	\$7.2

Source: Tourism Economics

Missouri River Visitor Spending

- The Missouri River region accounted for 7.5% of visitor spending in South Dakota.
- Visitor spending growth in the region trailed the statewide growth rate, as visitor spending in the Missouri River Region remained the same in 2025.
- Hughes County outpaced the region and the state, with 2.2% growth. The county remained the largest source of visitor spending in the region registering 25.6% in 2025.

Missouri River Visitor Spending Timeline

\$ millions, % share

	2021	2022	2023	2024	2025	2025 Growth	Share of Region	Share of State
Missouri River	\$327.6	\$374.8	\$386.0	\$386.9	\$387.0	0.0%	7.5%	7.5%
State Total	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	\$5,157.7	1.1%		100.0%
Aurora County	\$6.7	\$9.3	\$9.0	\$8.6	\$8.7	1.2%	2.2%	0.2%
Brule County	\$33.1	\$37.2	\$36.4	\$36.2	\$34.7	-4.2%	9.0%	0.7%
Buffalo County	\$6.7	\$7.1	\$7.5	\$7.6	\$7.6	-0.7%	2.0%	0.1%
Campbell County	\$3.2	\$3.1	\$3.2	\$3.2	\$3.1	-1.1%	0.8%	0.1%
Charles Mix County	\$27.5	\$30.2	\$32.3	\$31.8	\$31.7	-0.1%	8.2%	0.6%
Corson County	\$1.9	\$2.1	\$2.3	\$2.3	\$2.1	-8.6%	0.5%	0.0%
Dewey County	\$9.5	\$10.6	\$9.9	\$9.7	\$9.0	-6.5%	2.3%	0.2%
Gregory County	\$12.4	\$17.3	\$17.4	\$17.8	\$17.3	-3.1%	4.5%	0.3%
Hughes County	\$79.1	\$98.1	\$97.2	\$97.1	\$99.2	2.2%	25.6%	1.9%
Hyde County	\$2.1	\$2.4	\$2.8	\$2.8	\$2.8	-0.8%	0.7%	0.1%
Lyman County	\$39.8	\$43.9	\$48.1	\$47.9	\$44.5	-7.0%	11.5%	0.9%
Potter County	\$16.7	\$15.3	\$18.4	\$20.7	\$22.2	7.6%	5.7%	0.4%
Stanley County	\$23.1	\$26.5	\$27.9	\$27.5	\$28.6	4.1%	7.4%	0.6%
Sully County	\$14.9	\$14.5	\$14.1	\$13.9	\$14.9	7.2%	3.9%	0.3%
Tripp County	\$22.5	\$26.0	\$26.5	\$26.4	\$25.6	-3.1%	6.6%	0.5%
Walworth County	\$27.8	\$30.2	\$31.9	\$32.5	\$33.8	4.0%	8.7%	0.7%
Ziebach County	\$0.7	\$0.8	\$0.9	\$1.0	\$1.1	0.7%	0.3%	0.0%

Source: Tourism Economics



Missouri River Spending and Impacts

Missouri River Visitor Spending (2025)

\$ millions

						Total	2025 growth	Total State and Local Taxes
	Lodging	Food and beverage	Recreation	Retail	Transportation			
Missouri River	\$93.1	\$79.4	\$58.9	\$76.6	\$79.0	\$387.0	0.0%	\$32.0
State Total	\$1,036.2	\$1,172.1	\$807.4	\$1,066.7	\$1,075.2	\$5,157.7	1.1%	\$406.1
Aurora County	\$0.9	\$1.1	\$0.8	\$0.6	\$5.3	\$8.7	1.2%	\$0.8
Brule County	\$6.4	\$9.1	\$4.5	\$8.2	\$6.5	\$34.7	-4.2%	\$3.0
Buffalo County	\$3.3	\$1.1	\$0.9	\$1.2	\$1.2	\$7.6	-0.7%	\$0.5
Campbell County	\$0.6	\$1.0	\$0.1	\$0.8	\$0.7	\$3.1	-1.1%	\$0.3
Charles Mix County	\$10.6	\$4.9	\$3.9	\$5.0	\$7.3	\$31.7	-0.1%	\$2.4
Corson County	\$0.2	\$0.7	\$0.1	\$0.2	\$0.8	\$2.1	-8.6%	\$0.2
Dewey County	\$0.8	\$1.6	\$0.7	\$2.1	\$3.9	\$9.0	-6.5%	\$0.7
Gregory County	\$3.1	\$4.3	\$3.6	\$2.8	\$3.5	\$17.3	-3.1%	\$1.8
Hughes County	\$22.3	\$23.7	\$16.7	\$18.8	\$17.7	\$99.2	2.2%	\$8.7
Hyde County	\$0.3	\$0.4	\$0.4	\$1.2	\$0.5	\$2.8	-0.8%	\$0.3
Lyman County	\$12.7	\$5.5	\$7.3	\$9.6	\$9.4	\$44.5	-7.0%	\$3.5
Potter County	\$7.6	\$3.4	\$2.1	\$4.3	\$4.8	\$22.2	7.6%	\$1.8
Stanley County	\$7.6	\$6.4	\$4.4	\$5.6	\$4.6	\$28.6	4.1%	\$2.1
Sully County	\$1.3	\$3.5	\$7.3	\$1.4	\$1.4	\$14.9	7.2%	\$1.1
Tripp County	\$4.3	\$5.4	\$2.7	\$8.3	\$4.9	\$25.6	-3.1%	\$2.1
Walworth County	\$10.8	\$6.7	\$3.5	\$6.3	\$6.4	\$33.8	4.0%	\$2.6
Ziebach County	\$0.2	\$0.5	\$0.0	\$0.2	\$0.1	\$1.1	0.7%	\$0.1

Source: Tourism Economics

Missouri River Visitor Economy Impacts (2025)

\$ millions, jobs, % share

	Employment		Total Share of Region	Total Share of State	Total Share of County Employment	Personal Income	
	Direct	Total				Direct	Total
Missouri River	3,107	4,480	100.0%	7.6%		\$87.7	\$151.8
State Total	41,244	59,145	100.0%			\$1,290.3	\$2,282.9
Aurora County	41	85	1.9%	0.1%	5.1%	\$0.9	\$3.0
Brule County	284	366	8.2%	0.6%	11.0%	\$6.9	\$9.8
Buffalo County	68	87	1.9%	0.1%	13.1%	\$2.0	\$3.0
Campbell County	13	20	0.5%	0.0%	2.3%	\$0.3	\$0.6
Charles Mix County	277	397	8.9%	0.7%	7.1%	\$7.6	\$12.8
Corson County	10	17	0.4%	0.0%	1.2%	\$0.2	\$0.6
Dewey County	50	102	2.3%	0.2%	3.1%	\$1.3	\$3.5
Gregory County	159	212	4.7%	0.4%	7.1%	\$3.7	\$6.0
Hughes County	921	1,353	30.2%	2.3%	9.3%	\$26.1	\$50.0
Hyde County	21	38	0.8%	0.1%	3.6%	\$0.6	\$1.6
Lyman County	413	595	13.3%	1.0%	26.5%	\$13.2	\$19.1
Potter County	119	196	4.4%	0.3%	12.4%	\$3.3	\$6.8
Stanley County	177	226	5.0%	0.4%	9.8%	\$4.6	\$6.4
Sully County	93	114	2.5%	0.2%	7.8%	\$4.1	\$5.2
Tripp County	212	306	6.8%	0.5%	7.3%	\$6.1	\$10.8
Walworth County	242	354	7.9%	0.6%	10.7%	\$6.7	\$12.1
Ziebach County	7	12	0.3%	0.0%	1.7%	\$0.2	\$0.3

Source: Tourism Economics

Southeast Visitor Spending

- The Southeast was the largest region of the state in terms of visitor spending, constituting 40.0% of visitor spending in 2025.
- Visitor spending growth in the region followed closely behind the state, growing 0.8% in 2025.
- Minnehaha County comprised the vast majority of visitor spending in the region, encompassing nearly 75%.
- Over 40.0% of tourism supported jobs in South Dakota was concentrated in the Southeast. Over 44.0% of tourism supported personal income in the state were generated in the Southeast as employees earned higher wages compared to the rest of the state.

Southeast Visitor Spending Timeline

\$ millions

	2021	2022	2023	2024	2025	2025 Growth	Share of Region	Share of State
Southeast	\$1,586.1	\$1,862.7	\$1,959.9	\$2,048.0	\$2,064.9	0.8%	100.0%	40.0%
State Total	\$4,387.1	\$4,729.9	\$4,962.7	\$5,099.4	\$5,157.7	1.1%		100.0%
Bon Homme County	\$6.0	\$6.2	\$7.5	\$7.1	\$7.2	0.5%	0.3%	0.1%
Clay County	\$29.2	\$30.9	\$34.4	\$35.4	\$35.4	0.2%	1.7%	0.7%
Davison County	\$104.7	\$111.7	\$114.6	\$118.4	\$122.0	3.0%	5.9%	2.4%
Douglas County	\$3.4	\$3.5	\$3.9	\$4.1	\$3.5	-15.2%	0.2%	0.1%
Hanson County	\$4.3	\$5.2	\$6.0	\$6.3	\$6.5	3.2%	0.3%	0.1%
Hutchinson County	\$13.3	\$15.7	\$15.6	\$15.6	\$15.4	-1.5%	0.7%	0.3%
Lake County	\$30.5	\$33.6	\$35.2	\$36.4	\$35.1	-3.5%	1.7%	0.7%
Lincoln County	\$83.2	\$97.8	\$102.9	\$103.9	\$100.8	-2.9%	4.9%	2.0%
McCook County	\$9.7	\$11.1	\$11.2	\$10.9	\$10.4	-5.2%	0.5%	0.2%
Miner County	\$6.3	\$10.1	\$9.8	\$10.0	\$9.7	-3.8%	0.5%	0.2%
Minnehaha County	\$1,161.7	\$1,387.0	\$1,456.1	\$1,531.6	\$1,554.2	1.5%	75.3%	30.1%
Turner County	\$6.1	\$7.1	\$7.4	\$8.3	\$8.5	2.6%	0.4%	0.2%
Union County	\$50.4	\$55.2	\$58.1	\$59.4	\$56.3	-5.3%	2.7%	1.1%
Yankton County	\$77.3	\$87.6	\$97.2	\$100.6	\$100.1	-0.5%	4.8%	1.9%

Source: Tourism Economics



Southwest Spending and Impacts

Southwest Visitor Spending (2025)

\$ millions

	Lodging	Food and beverage	Recreation	Retail	Transportation	Total	2025 growth	Total State and Local Taxes
Southwest	\$275.3	\$475.8	\$313.8	\$468.8	\$531.2	\$2,064.9	0.8%	\$161.5
State Total	\$1,036.2	\$1,172.1	\$807.4	\$1,066.7	\$1,075.2	\$5,157.7	1.1%	\$406.1
Bon Homme County	\$0.6	\$2.7	\$0.6	\$0.6	\$2.7	\$7.2	0.5%	\$0.8
Clay County	\$5.0	\$11.9	\$2.9	\$4.2	\$11.5	\$35.4	0.2%	\$3.1
Davison County	\$24.0	\$26.8	\$20.0	\$23.9	\$27.3	\$122.0	3.0%	\$9.6
Douglas County	\$0.3	\$1.0	\$0.3	\$0.9	\$1.1	\$3.5	-15.2%	\$0.4
Hanson County	\$1.3	\$1.4	\$1.0	\$1.2	\$1.5	\$6.5	3.2%	\$0.7
Hutchinson County	\$1.0	\$1.9	\$2.3	\$2.8	\$7.4	\$15.4	-1.5%	\$1.5
Lake County	\$4.8	\$11.3	\$6.4	\$6.0	\$6.6	\$35.1	-3.5%	\$3.1
Lincoln County	\$9.2	\$23.3	\$20.5	\$15.4	\$32.5	\$100.8	-2.9%	\$11.1
McCook County	\$1.4	\$1.8	\$0.9	\$4.0	\$2.4	\$10.4	-5.2%	\$0.9
Miner County	\$2.0	\$1.9	\$0.9	\$2.9	\$1.9	\$9.7	-3.8%	\$0.8
Minnehaha County	\$203.0	\$349.5	\$225.5	\$373.4	\$402.7	\$1,554.2	1.5%	\$115.8
Turner County	\$0.8	\$1.5	\$0.9	\$2.1	\$3.3	\$8.5	2.6%	\$1.1
Union County	\$7.6	\$14.1	\$14.4	\$8.8	\$11.4	\$56.3	-5.3%	\$5.4
Yankton County	\$14.4	\$26.9	\$17.2	\$22.7	\$19.0	\$100.1	-0.5%	\$7.2

Source: Tourism Economics

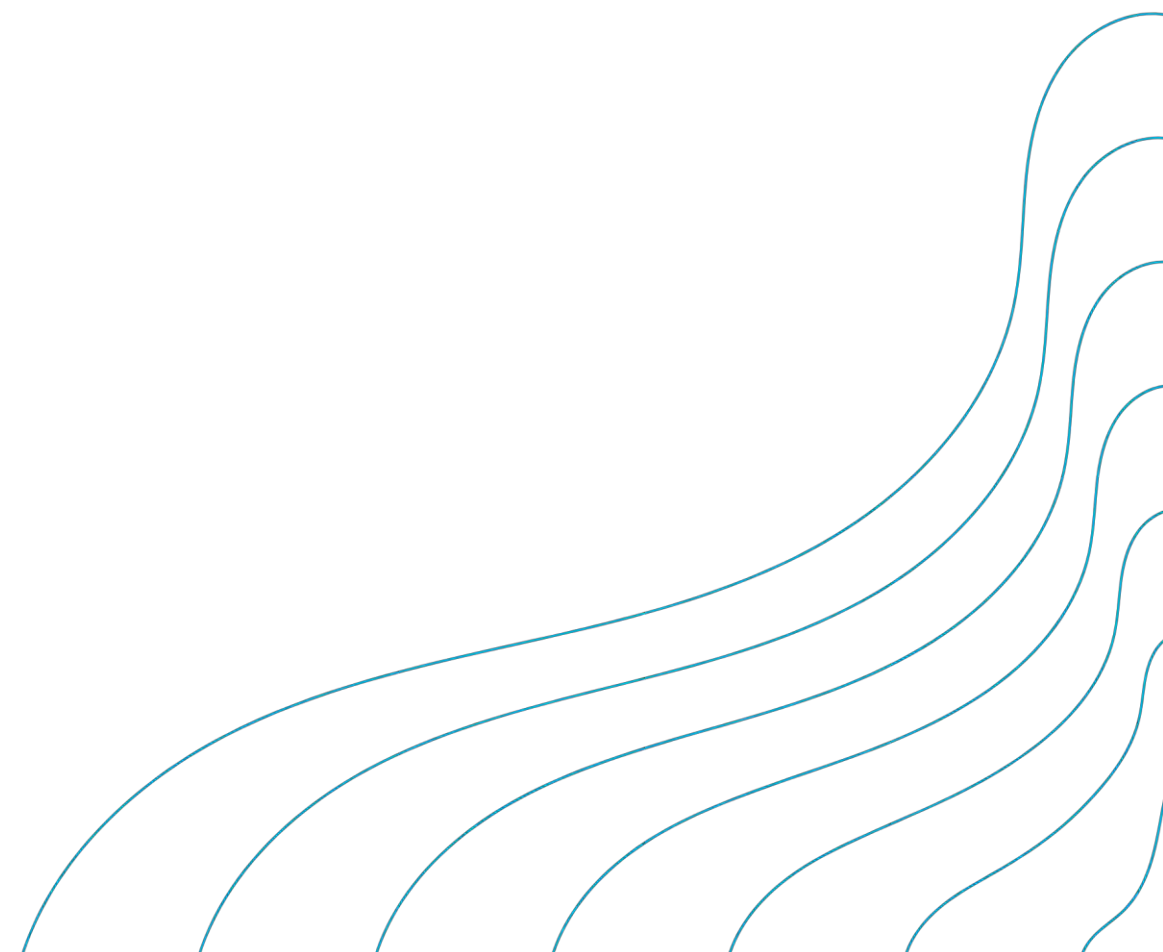
Southwest Visitor Economy Impacts (2025)

\$ millions, jobs, % share

	Employment		Share of Region	Share of State	Share of County Employment	Personal Income	
	Direct	Total				Direct	Total
Southwest	16,348	24,043	100.0%	40.7%		\$535.7	\$1,016.8
State Total	41,244	59,145		100.0%		\$1,290.3	\$2,282.9
Bon Homme County	74	117	0.5%	0.2%	3.7%	\$1.5	\$3.5
Clay County	354	557	2.3%	0.9%	5.8%	\$8.2	\$16.0
Davison County	1,176	1,617	6.7%	2.7%	9.6%	\$34.2	\$57.6
Douglas County	20	35	0.1%	0.1%	1.6%	\$0.3	\$1.0
Hanson County	45	70	0.3%	0.1%	4.1%	\$1.3	\$2.9
Hutchinson County	93	173	0.7%	0.3%	3.6%	\$1.6	\$5.8
Lake County	403	523	2.2%	0.9%	6.7%	\$8.6	\$15.1
Lincoln County	709	1,295	5.4%	2.2%	2.7%	\$19.2	\$59.0
McCook County	55	89	0.4%	0.1%	2.8%	\$1.0	\$2.7
Miner County	51	81	0.3%	0.1%	5.0%	\$0.7	\$2.2
Minnehaha County	11,805	17,188	71.5%	29.1%	9.3%	\$418.3	\$766.2
Turner County	65	124	0.5%	0.2%	2.6%	\$1.3	\$4.3
Union County	515	748	3.1%	1.3%	5.6%	\$13.8	\$32.0
Yankton County	983	1,427	5.9%	2.4%	8.2%	\$25.7	\$48.8

Source: Tourism Economics

APPENDIX



Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone who stayed overnight or traveled more than 50 miles, outside of their normal routine, to the destination.

The study area is defined as the State of South Dakota and its counties.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g. lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations.

The Tourism Satellite Account (TSA) which measures the tourism-related capital investments into the economy of the study area, are estimated through the analysis of industry-specific data sets on the construction industry, Census Capital Expenditure Survey data, BEA personal consumption expenditure data, and government data.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

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 data, including room demand, room rates, occupancy, and room revenue for hotels and short-term rentals
- **South Dakota 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:** Economic Census data, as well as data on population, households, second homes, and real estate taxes paid
- **U.S. Energy Information Administration:** Gasoline prices for the Midwest area
- **U.S. Department of Transportation:** Air passenger data for airports in South Dakota
- **Tourism Economics:** International travel data for to South Dakota based on aviation, survey, and credit card information
- **Oxford Economics:** Construction data, by industry, for South Dakota

Glossary

SPENDING DEFINITIONS	LODGING	All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.
	FOOD & 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 sector.
	RETAIL	Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.
	LOCAL TRANSPORT	Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.
	AIR TRANSPORT	Where applicable, the local share of air transportation spending.
ECONOMIC IMPACT DEFINITIONS	SECOND HOMES	Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.
	DIRECT IMPACT	Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).
	INDIRECT IMPACT	Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).
	INDUCED IMPACT	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.
	EMPLOYMENT	Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
	PERSONAL INCOME	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
	VALUE ADDED (GDP)	Business sales net of intermediate (supply chain) purchases.
	LOCAL TAXES	City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.
	STATE TAXES	State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics 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 was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling 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.

Oxford Economics employs more than 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, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



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