

BLACK HILLS
& BADLANDS **SD**
— ◆ —
TOURISM ASSOCIATION

TOURISM ECONOMICS
OF THE BLACK HILLS





MICHELLE THOMSON

BLACK HILLS & BADLANDS TOURISM ASSOCIATION
PRESIDENT/CEO



-
- Who is BH&B?
 - Mission, Vision, Purpose
 - BH&B Marketing Campaigns
 - Tourism Impact Statistics
 - Outdoor Recreation Impact
 - Outdoor Enthusiasts Study
-



Black Hills & Badlands Tourism Association is a private, non-profit membership association dedicated to promoting tourism in western South Dakota and northeastern Wyoming for the benefit of its members. Celebrating 85 years of service, the association is a trusted leader in the region's tourism industry.

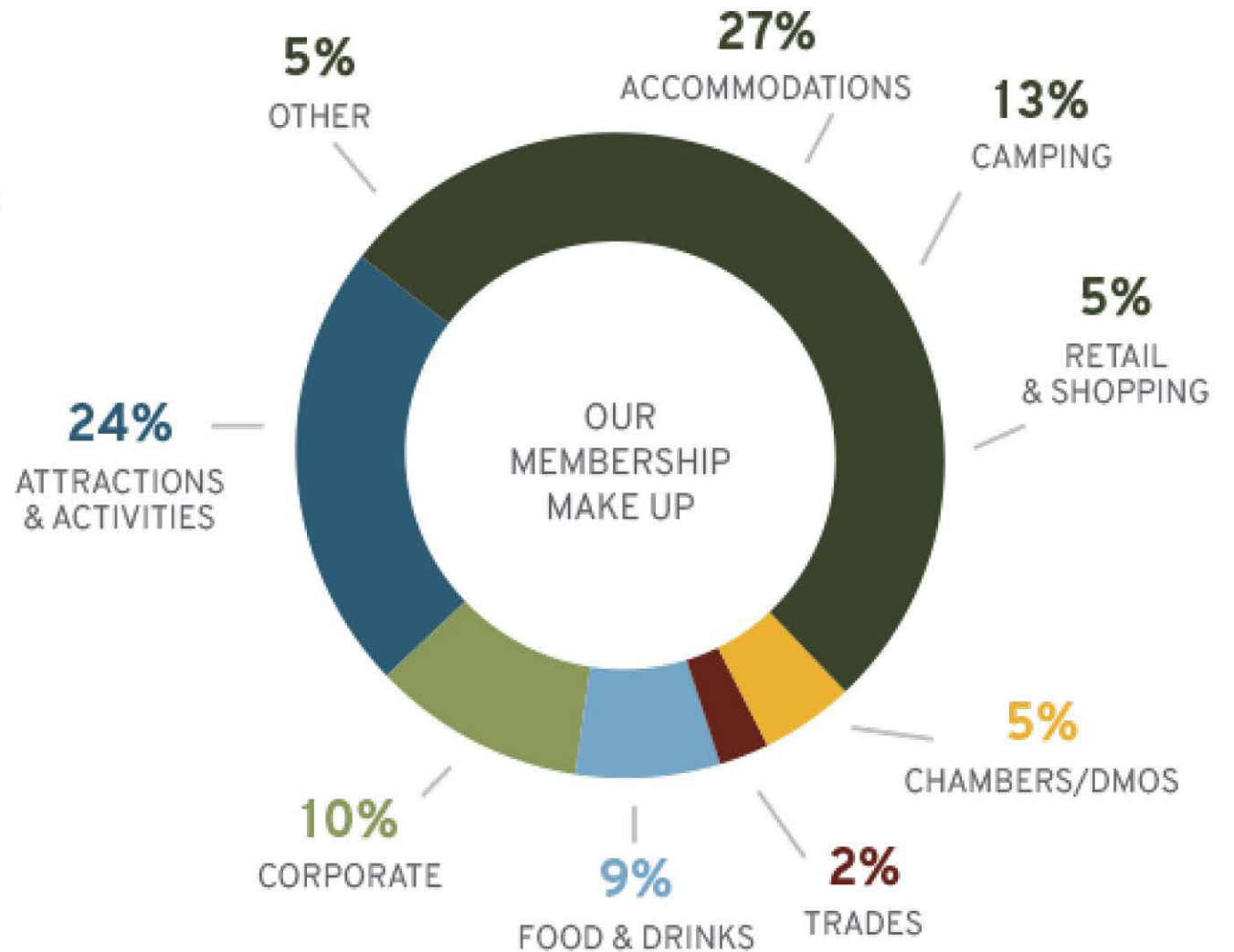
MEMBERSHIP

483

TOTAL MEMBERS

91%

RETENTION RATE





PURPOSE

To serve members by promoting, advocating and marketing the Black Hills and Badlands region.



VISION

Our vision is that the Black Hills and Badlands region will be the ultimate experience.



MISSION

Our mission is to serve as a unifying force to increase visitor numbers, trip duration and visitor sales for the economic benefit of our members and the communities we serve.

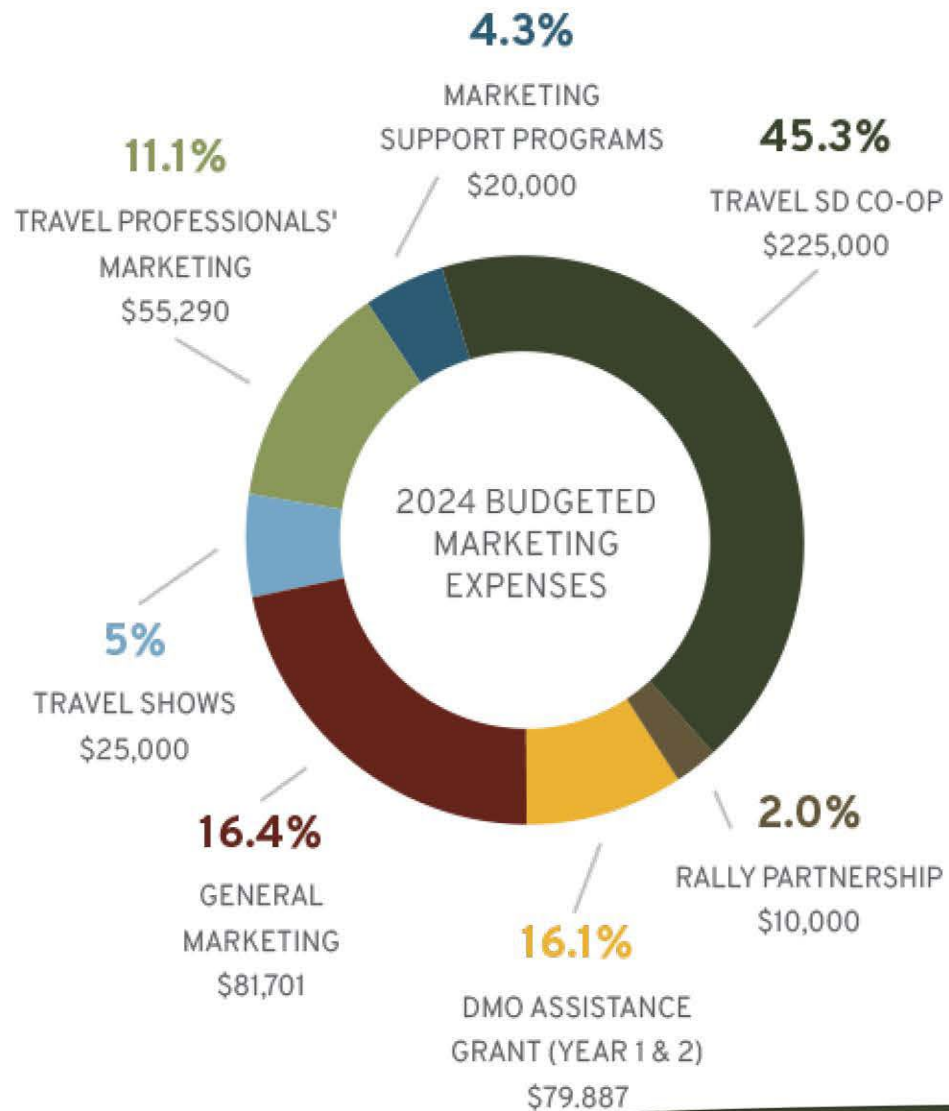
YEAR-ROUND MARKETING CAMPAIGNS

59.9M

TOTAL IMPRESSIONS

531.3K

TOTAL ENGAGEMENTS



Move in time to nature's

RHYTHM



South Dakota

PARTNERSHIP

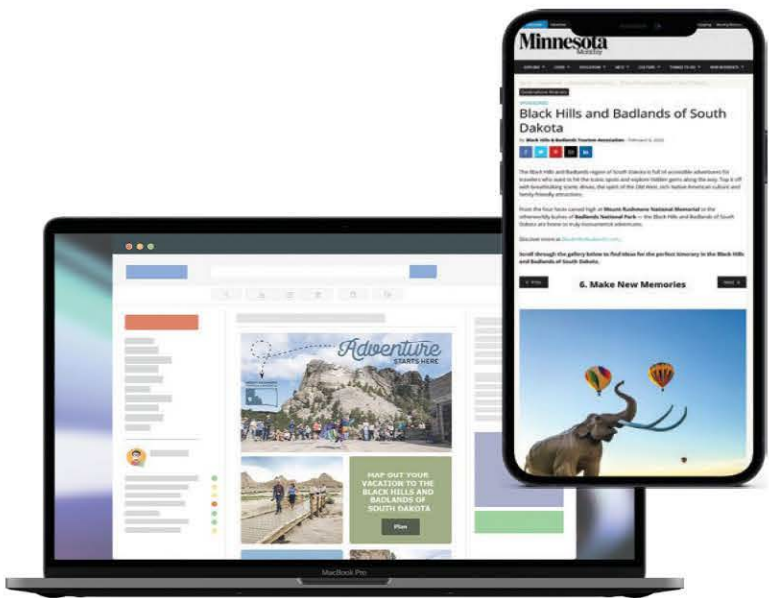
52.2M

TOTAL IMPRESSIONS

164.7K

TOTAL ENGAGEMENTS

* Combined Peak & Shoulder Marketing



BH&B DIGITAL CAMPAIGNS

10.2M

TOTAL IMPRESSIONS

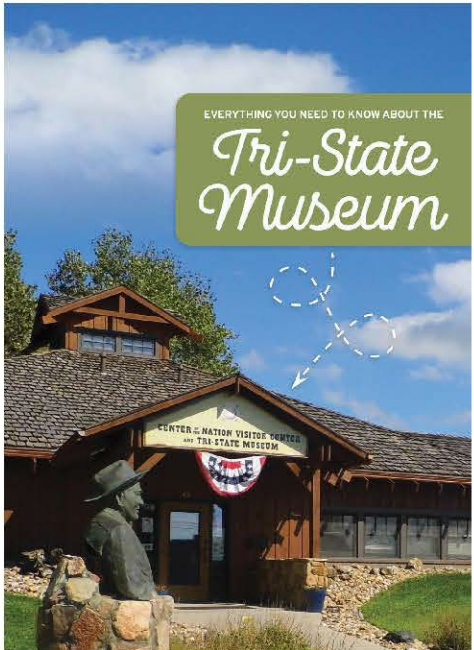
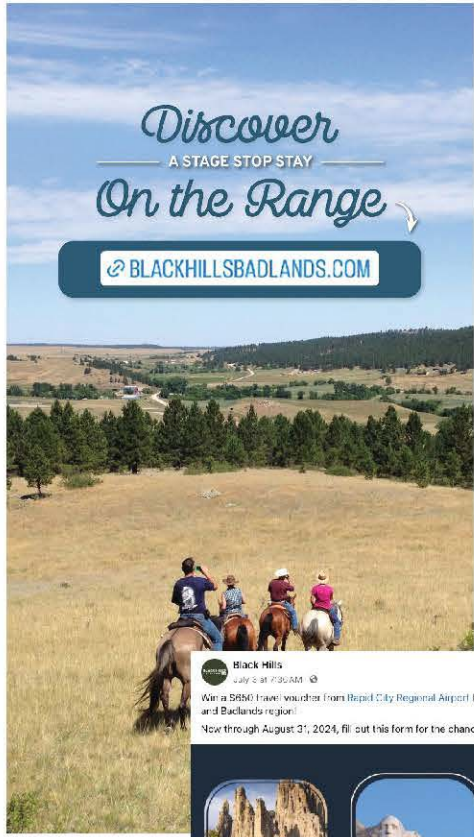
361.2K

TOTAL ENGAGEMENTS

\$34.1M

EST. PAID DISPLAY ROI
Source Datafy





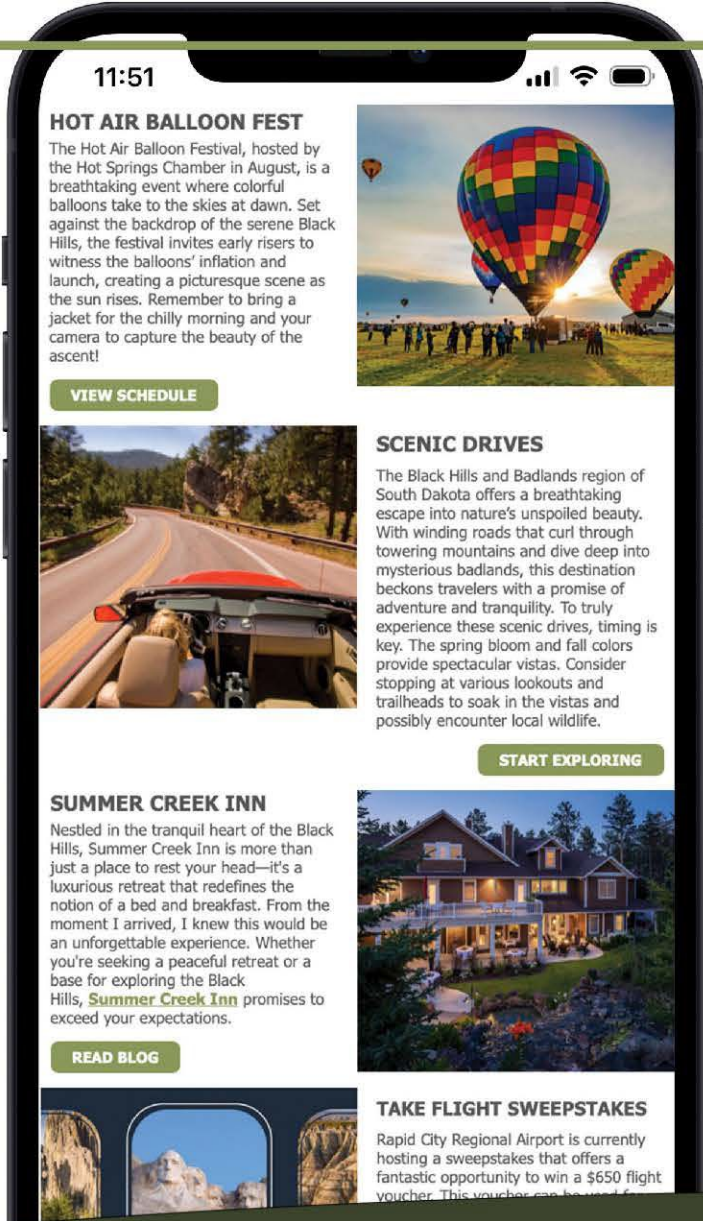
SOCIAL MEDIA

6.7M

TOTAL IMPRESSIONS

224.9K

TOTAL ENGAGEMENTS



EMAIL MARKETING

33.23%

TOTAL IMPRESSIONS

3.99%

CTOR

111.3K

SUBSCRIBERS

BlackHills Badlands.com

1.5M

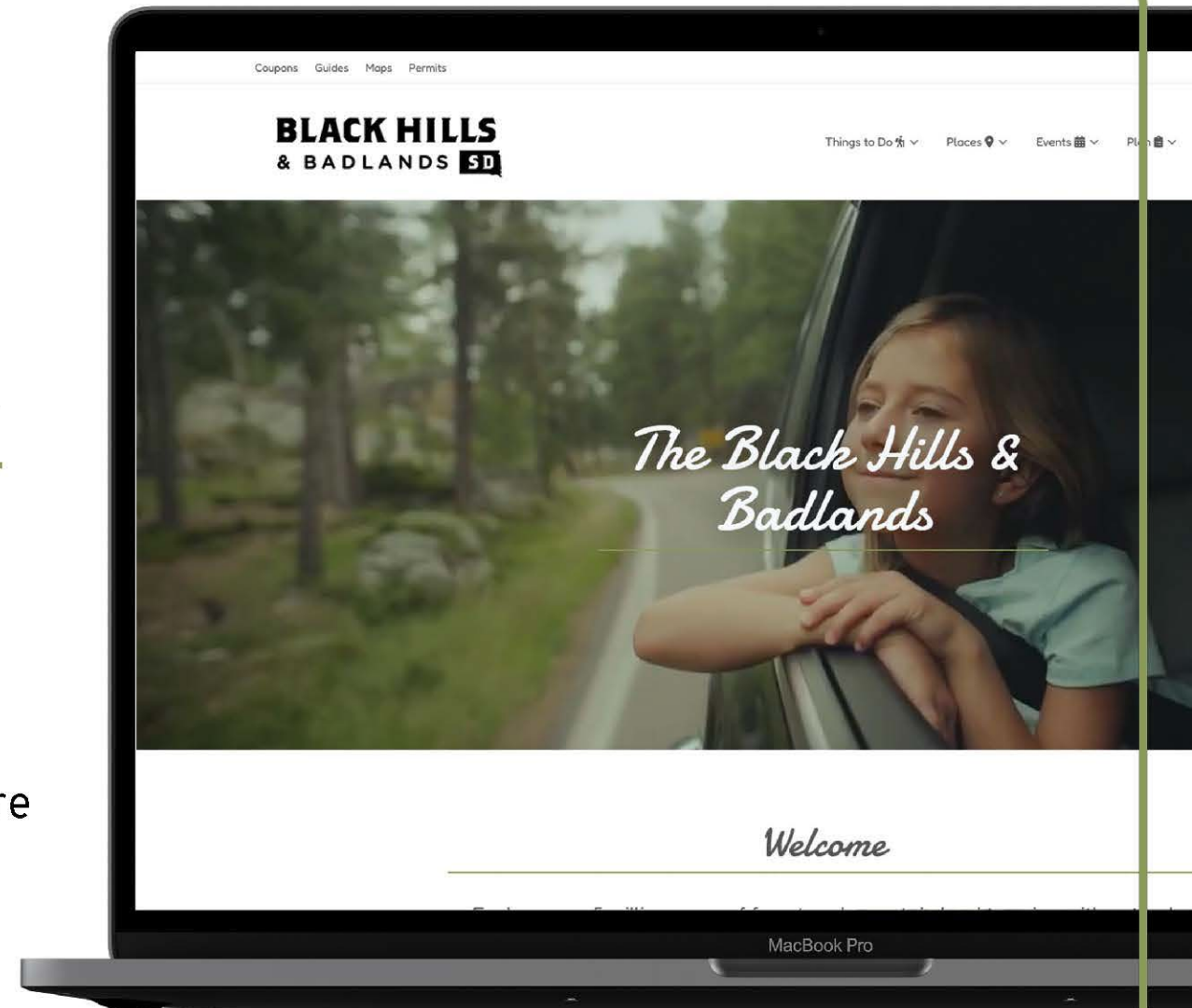
PAGEVIEWS

138K

BLOG ARTICLES READ

TOP CONTENT

1. Maps
2. Things to Do
3. Events
4. Stay
5. Mount Rushmore
6. Permits



PRINTED PUBLICATIONS



SOUTH DAKOTA
VACATION GUIDE



BLACK HILLS & BADLANDS
VACATION GUIDE



TRAVEL PROFESSIONALS
GUIDE



OFF-ROAD
ADVENTURES GUIDE

MAPS & CALENDARS

- Attractions Tear-off Map
- Motorcycle Tear-off Map
- Tasting Trail Map (BHBVG Insert)
- Fourth of July Events Calendar
- Fall Events Calendar



2024 Fall Events
 SPONSORED BY CRAZY HORSE MEMORIAL

AUGUST
 Aug. 27 - Sept. 1
Sturgis Mustang Rally
 Sturgis - SturgisMustangRally.com

SEPTEMBER
 Sept. 1-10
Living Treasures Indian Arts Cultural Exchange
 Spearfish - LivingTreasures.com

2024 Independence Day Events IN THE BLACK HILLS & BADLANDS
 SPONSORED BY BLACK HILLS & BADLANDS TOURISM ASSOCIATION

MOUNT RUSHMORE NATIONAL MEMORIAL
 July 3
 All Day Cultural demonstrations, dance, food and special experiences will be going on throughout the day. Lakota, Kiowa and Archaic Village Village. Photo: 10:00 am-11:00 am. 11:00 am-12:00 pm. 12:00 pm-1:00 pm. 1:00 pm-2:00 pm. 2:00 pm-3:00 pm. 3:00 pm-4:00 pm. 4:00 pm-5:00 pm. 5:00 pm-6:00 pm. 6:00 pm-7:00 pm. 7:00 pm-8:00 pm. 8:00 pm-9:00 pm. 9:00 pm-10:00 pm. 10:00 pm-11:00 pm. 11:00 pm-12:00 am.

BLACK HAWK
 July 3-4
 8 a.m. - 4 p.m. Guided tours, music, and more.

CRAZY HORSE MEMORIAL
 July 3-4
 8 a.m. - 4 p.m. Guided tours, music, and more.

BELLE FOURCHE
 June 30
 5:30 p.m. Community BBQ

CLUSTER
 July 4
 10 a.m. - 4 p.m. Parade

10 Black Hills Beer Fun Run/Ride
 Spearfish - FunRunRide.com

19-21 Black Hills Plain Air Field Out
 Hill City - HillCity.org

20-21 Sturgis MusicFest & Fall Festival
 Sturgis - SturgisMusicFest.com

20-21 Black Hills Picnic Shelter
 Hill City - PicnicShelter.com

20-21 Fall in Love with Lead
 Lead - LeadInLove.com

20-21 Michaelson Tr. George J. Michaelson
 Lead - MichaelsonTr.com

21 Cruiser Car Show & Street Fair
 Lead - CruiserCarShow.com

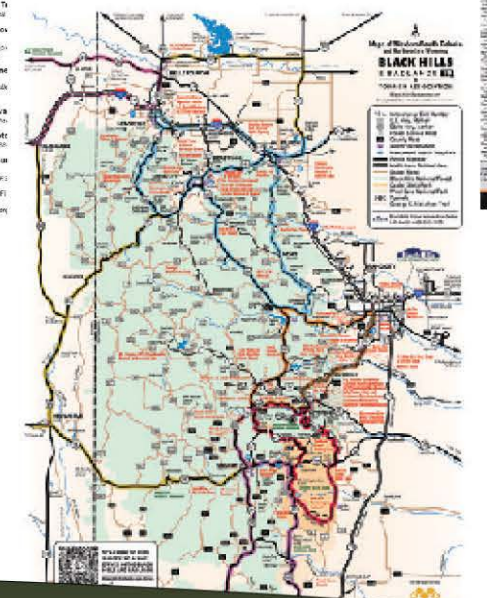
21 Newcastle Shine Festival
 Newcastle - NewcastleShine.com

21 Sturgis Fall Hot Pepper Festival
 Sturgis - SturgisFall.com

21 Old West Shows
 Hill City - OldWestShows.com

26-30 Buffalo Bus & Arts Festival
 Central City - BuffaloBus.com

27-29 Black Hills Ft. Lead City & Hill City
 Lead City - BlackHillsFt.com



TRAVEL TRADE

CO-OP PROGRAMS

- Digital Postcard Blitz
- Group Tour Profile
- International Profile
- Magazine Co-ops

385 CONSTRUCTION

- Potential Route Closures
- Detour Route

Visit us at www.blackhills.com for current road closure and detour information. Highway 385 Construction will be an ongoing project and may be available.

BLACK HILLS & BADLANDS REGION

With over 5 million acres of forest, prairie, and mountain lands, you'll find abundant natural beauty. We're West of the Rocky Mountains, rich with history, culture, and scenic views. For fun, we offer an array of activities, from fishing and hiking to modern-day adventures and breathtaking views throughout the Black Hills and Badlands of South Dakota.

SCAN HERE TO DISCOVER MORE

9 **Black Hills & Badlands Region Tourism Association**
605.515.3227 or 605.389.2029
www.blackhills.com
Black Hills & Badlands Region Tourism Association
1001 E. 10th Street, Suite 100, Rapid City, SD 57701
For more information, contact us at www.blackhills.com or call 605.515.3227.

1 **Adventure Tours**
605.309.7887 • Rapid City
Black Hills Adventure Tours
1001 E. 10th Street, Suite 100, Rapid City, SD 57701
For more information, contact us at www.blackhills.com or call 605.309.7887.

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TRAVEL TRADE

TRADE SHOWS

GROUP TOUR

- National Tour Association Travel Exchange
- American Bus Association Marketplace

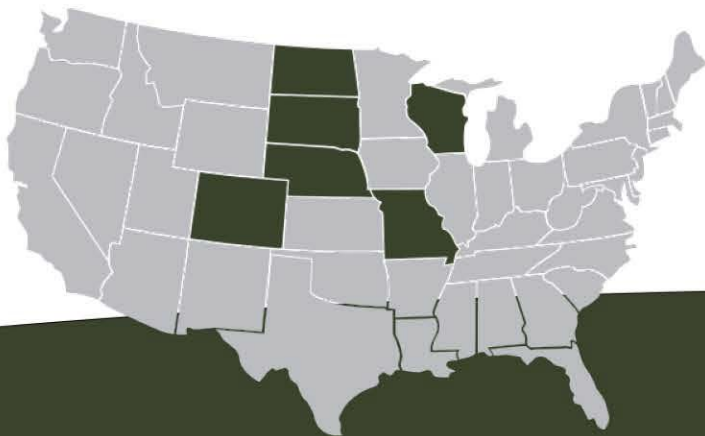
INTERNATIONAL

- Go West Summit
- International Roundup
- IPW



TRAVEL SHOWS '24

- The Ultimate RV Show - Denver, CO
- Kansas City RV Show - MO
- LaCrosse Boat, Sports, Travel, RV & Hunting Show - NE
- Omaha Boat, Sports & Travel Show - NE
- Red River Valley Sportsmen's Show - Fargo, ND
- Sioux Empire Sportsman's Show - SD
- Wisconsin Sport Show - Eau Claire, WI



BLACK HILLS VISITOR INFORMATION CENTER



24,643

VISITORS
SERVED



13,575

OHV
PERMITS SOLD



474

STATE PARK
PASSES SOLD

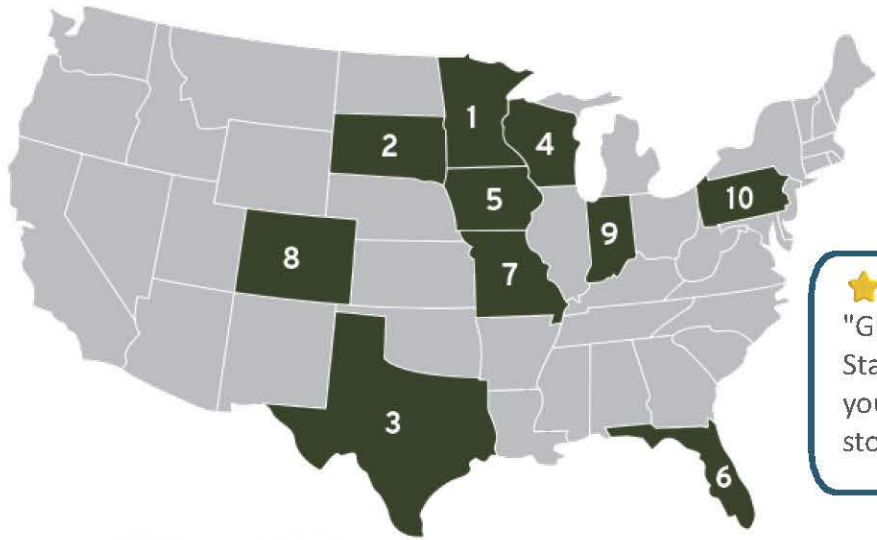


103

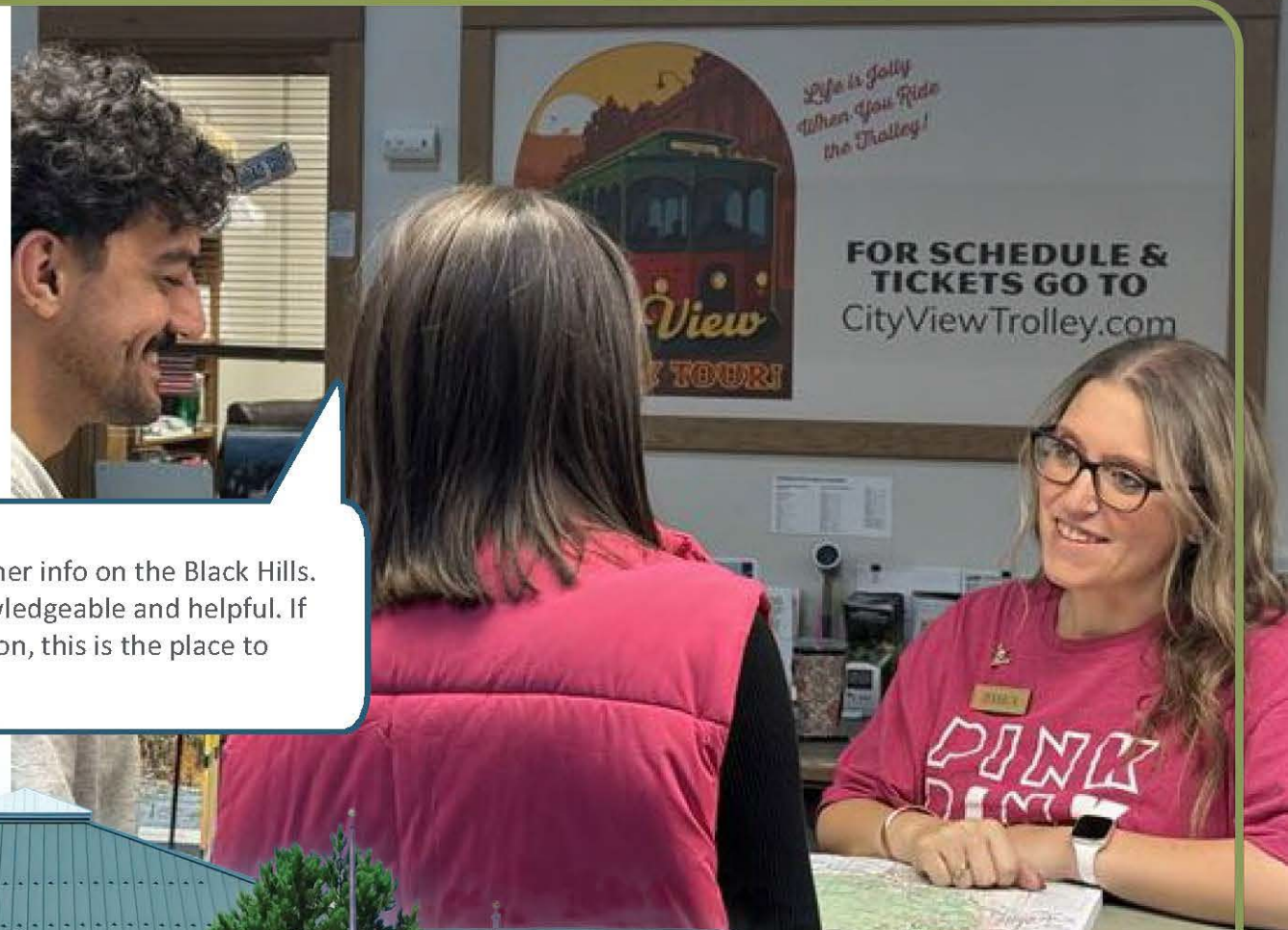
MICKELSON TRAIL
PERMITS SOLD



GUESTS



"Great place to gather info on the Black Hills. Staff was very knowledgeable and helpful. If you need information, this is the place to stop."





\$1.9 BILLION

BLACK HILLS
VISITOR SPENDING

*2023



**OVER
20 THOUSAND**

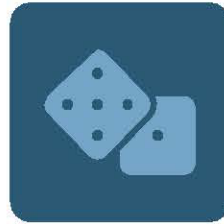
BLACK HILLS
JOBS SUPPORTED

*2023



\$590.3M

TOURISM SPENDING



\$1.6B

DEADWOOD GAMING HANDLE



4.2M

NATIONAL PARK
RECREATIONAL VISITS



3.2 DAYS

AVERAGE LENGTH OF STAY



31.7%

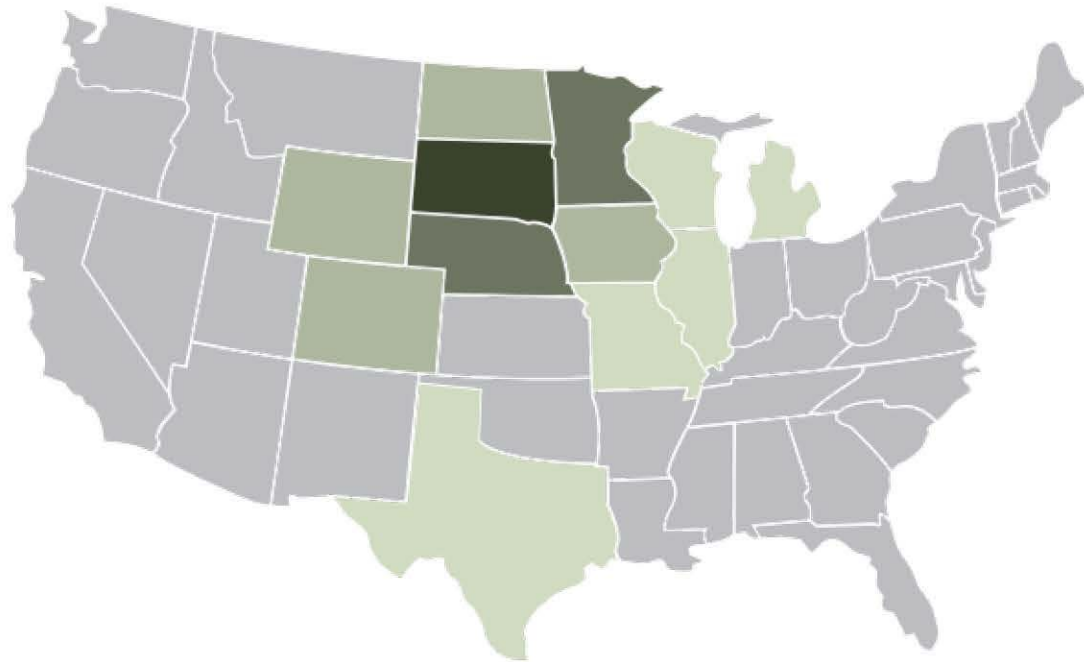
SHORT TERM RENTAL
OCCUPANCY



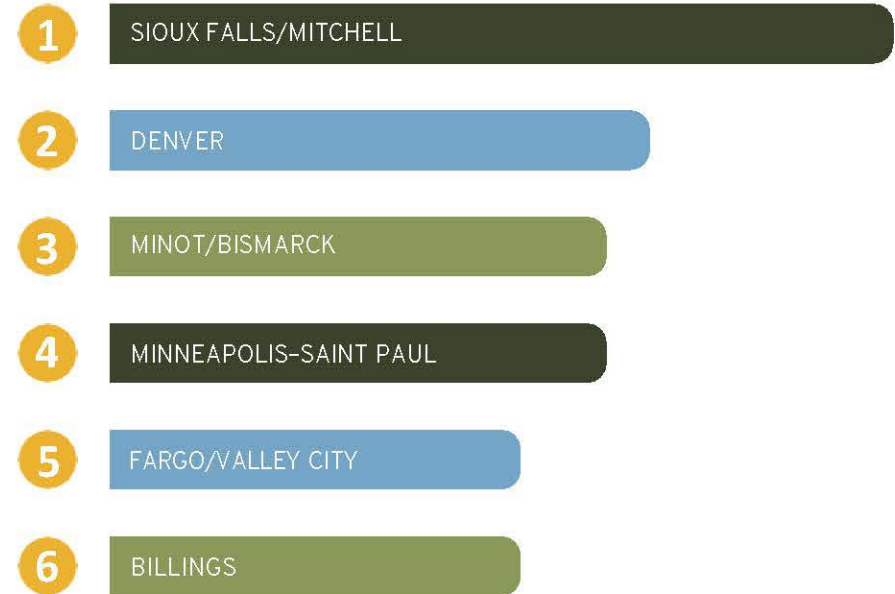
55.6%

HOTEL OCCUPANCY

TRAVELER ORIGINS

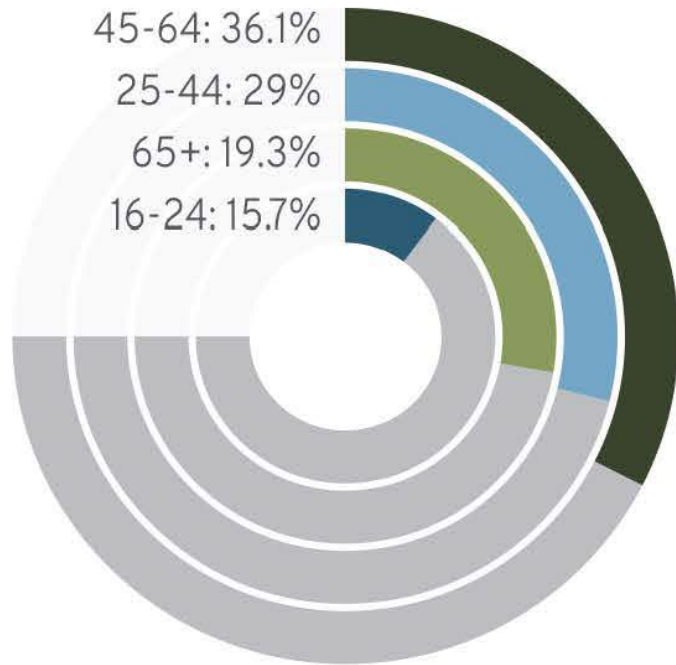


TOP SPENDER MARKETS

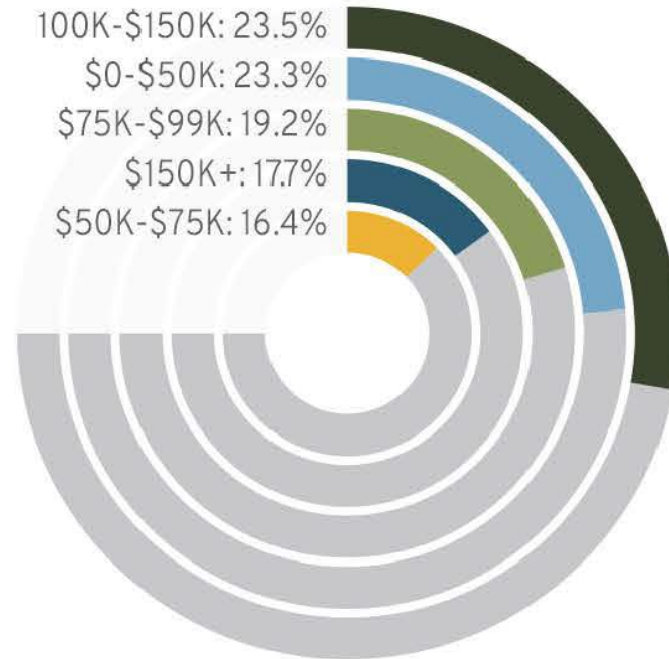


DEMOGRAPHICS

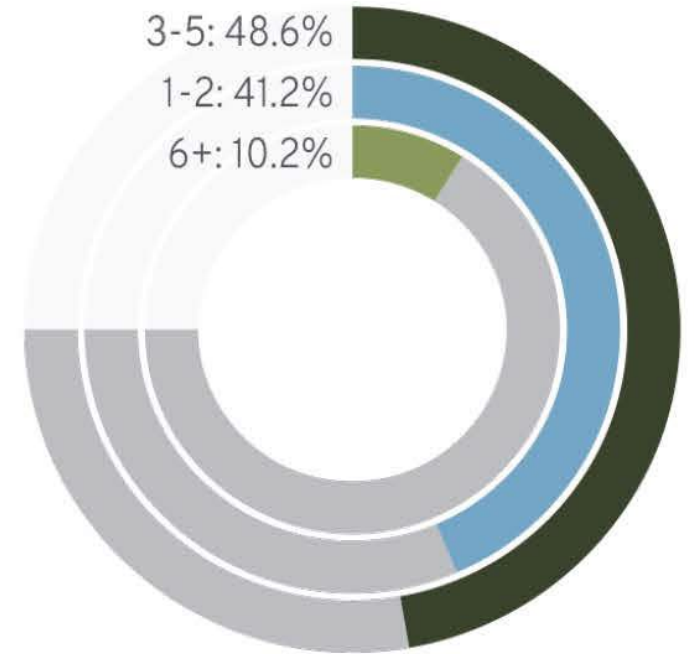
AGE



INCOME



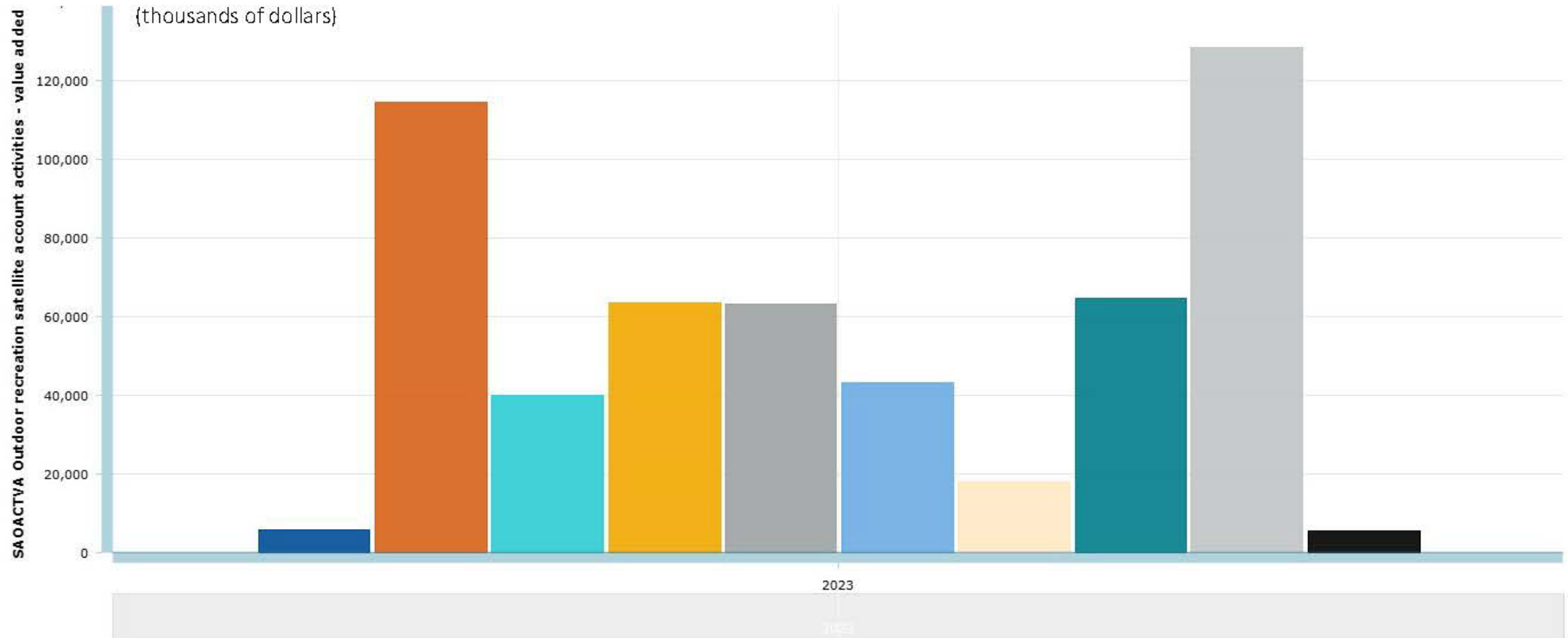
HOUSEHOLD SIZE



NATIONAL PARKS- Economic Contributions of National Park Visitor Spending

2023	Visitors	Spending In Gateway Regions	Jobs Supported	Labor Income	Value Added	Economic Output
South Dakota	4.4 M	\$600 M	8330	\$288 M	\$477 M	\$853 M
Badlands	1 M	\$135 M	1920	\$62.4 M	\$108 M	\$193 M
Devils Tower	511 K	\$37.6 M	492	\$14.9 M	\$26.3 M	\$48.9 M
Jewel Cave	122 K	\$8.1 M	112	\$3.3 M	\$5.7 M	\$10.7 M
Minuteman Missile	1 M	\$67.1 M	836	\$40.4 M	\$3.1 M	\$102 M
Mount Rushmore	2.4 M	\$389 M	5720	\$187 M	\$314 M	\$447 M
Wind Cave	592 K	\$52 M	727	\$22.9 M	\$40.5 M	\$74 M

Outdoor recreation satellite account activities – Conventional Outdoor Recreation



Source: U.S. Bureau of Economic Analysis

- Bicycling [South Dakota]
- Climbing / hiking / tent camping [South Dakota]
- Hunting / shooting / trapping [South Dakota]
- Snow activities [South Dakota]
- RVing [South Dakota]
- Boating / fishing [South Dakota]
- Equestrian [South Dakota]
- Motorcycling / ATVing [South Dakota]
- Other conventional outdoor recreation activities [South Dakota]
- Recreational flying [South Dakota]

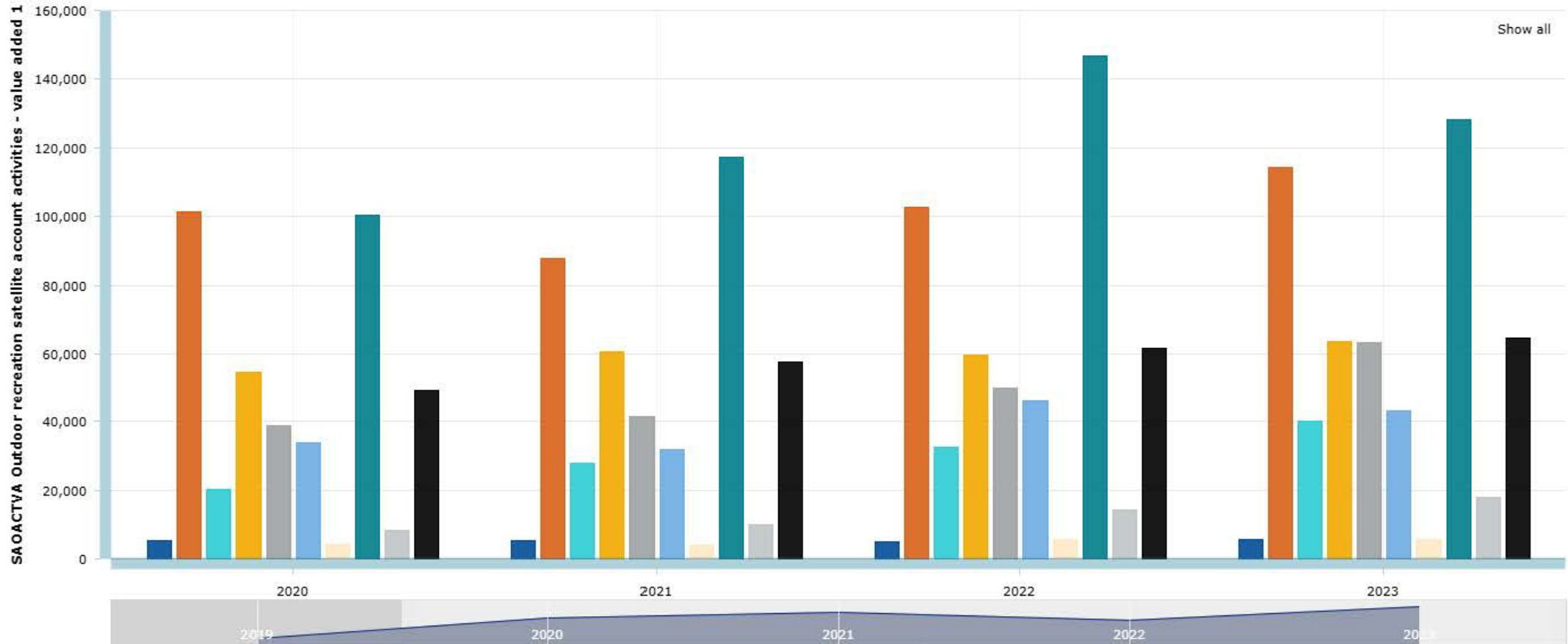
OUTDOOR RECREATION – State Outdoor Recreation Satellite Account

Activity	2019	2020	2021	2022	2023
Bicycling	7.4%	20.6%	4.9%	-6.7%	11.9%
Boating/Fishing	8.9%	30.2%	-13%	16.9%	11.5%
Climbing/Hiking/Tent Camping	-10%	39.1%	36.9%	16.6%	23.8%
Equestrian	-8%	4.8%	10.9%	-1.5%	6.5%
Hunting/Shooting/Trapping	-13%	-3.2%	6.7%	21.1%	26.2%
Motorcycling/ATVing	7.6%	4.3%	-5.9%	45.3%	-6.5%
Recreational Flying	4.4%	4.7%	-2.6%	40.1%	-1.5%
RVing	-5.9%	-4%	16.8%	25.3%	-13%
Snow Activities	3.4%	-5.9%	17.2%	46.4%	26%
Other Snow Activities	5.4%	35.2%	-4.1%	47.4%	62.7%

Conventional Outdoor Recreation 2019-2023

(thousands of dollars)

SAOACTVA Outdoor recreation satellite account activities - value added 1/



Source: U.S. Bureau of Economic Analysis

- Bicycling [South Dakota]
- Boating / fishing [South Dakota]
- Climbing / hiking / tent camping [South Dakota]
- Equestrian [South Dakota]
- Hunting / shooting / trapping [South Dakota]
- Motorcycling / ATVing [South Dakota]
- Recreational flying [South Dakota]
- RVing [South Dakota]
- Snow activities [South Dakota]
- Other conventional outdoor recreation activities [South Dakota]



GROWTH INTERESTS

- Snow and Other Snow Activities
- Climbing/Hiking/Tent Camping
- Hunting/Shooting/Trapping

Activity	2019	2020	2021	2022	2023
Other Snow Activities	5.20%	8.10%	10.40%	30.50%	62.70%
Climbing/Hiking/Tent Camping	4.80%	6.20%	9.70%	15.30%	23.80%
Hunting/Shooting/Trapping	3.50%	5.00%	8.90%	19.40%	26.20%



POPULAR INTERESTS

- Fishing
- Boating/Fishing
- Shooting and Archery

Activity	2019	2020	2021	2022	2023
Bicycling	7.4%	20.6%	4.9%	-6.7%	11.9%
Boating/Fishing	8.9%	30.2%	-13%	16.9%	11.5%
Shooting and Archery	8.00%	10.50%	15.20%	21.30%	27.90%



AREAS OF DECLINE

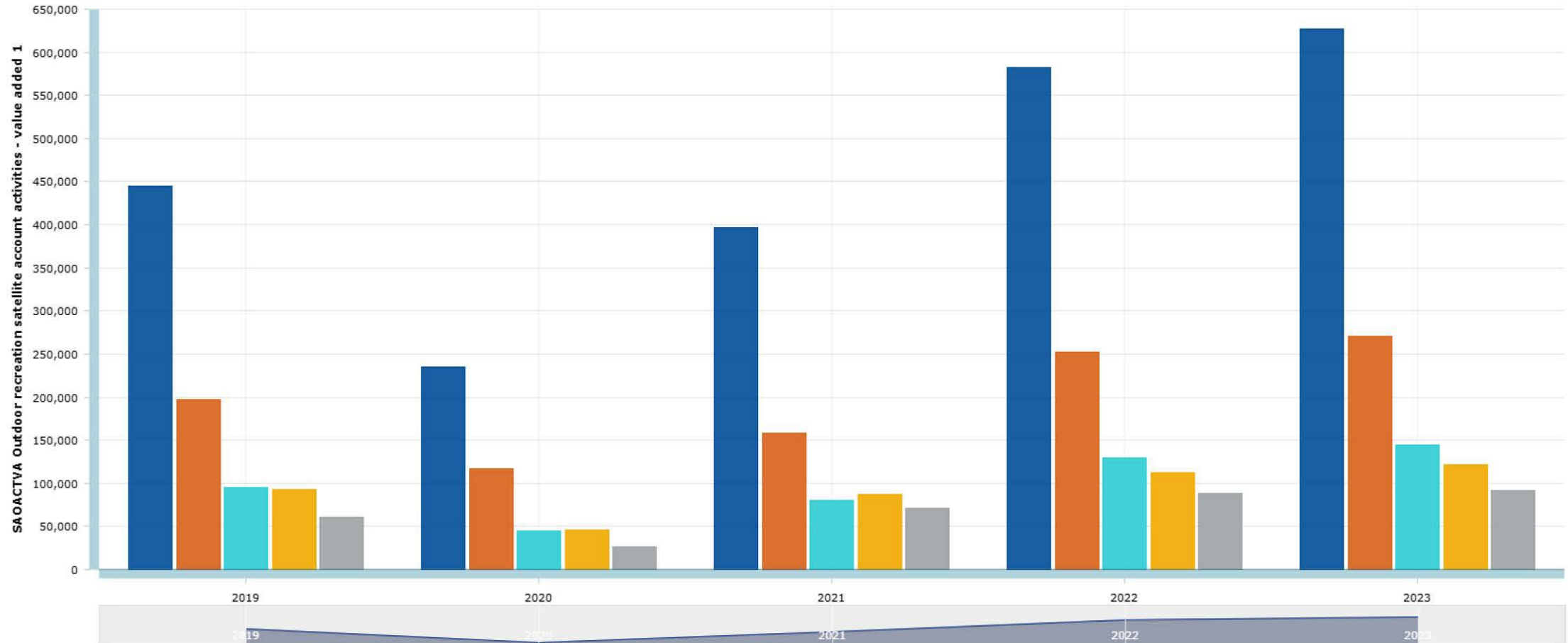
- RV'ing
- Motorcycling/ATVing

Activity	2019	2020	2021	2022	2023
RVing	7.00%	5.50%	3.20%	-8.40%	-12.70%
Motorcycling/ ATVing	6.50%	4.30%	2.90%	-3.10%	-6.50%

Outdoor recreation satellite account activities – Travel & Tourism

(Thousands of dollars)

SAOACTVA Outdoor recreation satellite account activities - value added 1/



Source: U.S. Bureau of Economic Analysis

- Travel and tourism 8 [South Dakota]
- Lodging [South Dakota]
- Transportation [South Dakota]
- Food and beverages [South Dakota]
- Shopping and souvenirs [South Dakota]

2021 Economic Contributions of OHV Recreation

in the Black Hills region

Table ES 2. Total statewide economic contributions of off-highway vehicle recreation in the Black Hills region.

Total statewide economic contributions	Residents	Nonresidents	Total
Output (millions)	\$181.7	\$23.2	\$204.9
Statewide GDP (millions)	\$104.4	\$13.3	\$117.7
Labor income (millions)	\$64.7	\$8.1	\$72.8
Jobs	1,682	238	1,920
Federal, state & local taxes (millions)	\$28.6	\$3.4	\$32.0

Table 2. Average day trip: Trip-related spending within South Dakota

Day trip spending	Average spending per person		Distribution of day trip spending	
	Residents	Nonresidents	Residents	Nonresidents
Food & drink	\$20.93	\$29.57	34%	35%
Transportation	\$24.17	\$25.65	39%	31%
Recreation	\$7.13	\$12.16	12%	15%
Souvenirs	\$3.82	\$11.80	6%	14%
Fees	\$5.48	\$4.62	9%	6%
Total	\$61.54	\$83.80	100%	100%

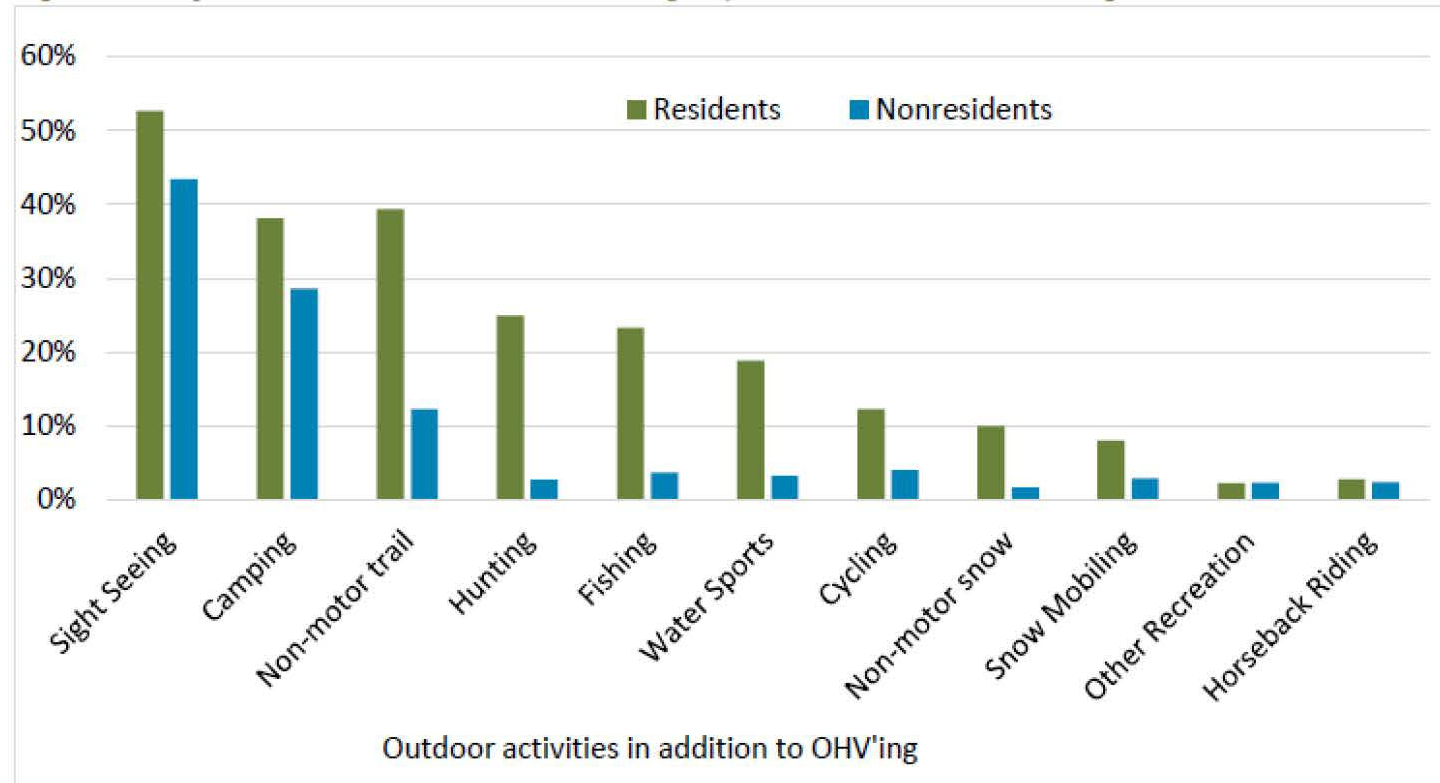
Average spending per group member for an overnight trip was estimated to be just over \$175 for residents and \$280 for non-residents. Overnight accommodations contributed the single largest proportion (~40%), followed by food and fuel.

Residents who take overnight trips take an average of 6.0 trips per year and spend 4.1 days away from home per trip. Nonresidents who take overnight trips taken an average of 4.6 trips per year and 5.3 days away from home.

Reasons for visiting the Black Hills region

In addition to recreational OHV activities, riders also engaged in other outdoor recreational activities such as sightseeing, camping, non-motorized trail sports (hiking, running, rock climbing), hunting, and fishing (Figure 15.)

Figure 15. Of those who OHV or 4X4 in the region, what other activities bring them to the area?





Outdoor Enthusiasts

The State of the American Traveler—2024
Segments Edition

Future Partners

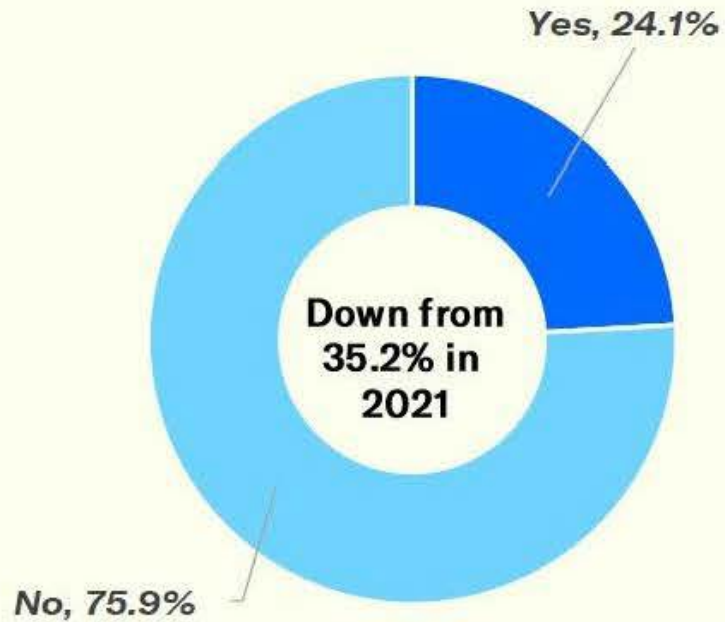
Outdoor Enthusiasts

Travelers who are passionate about at least one of these:

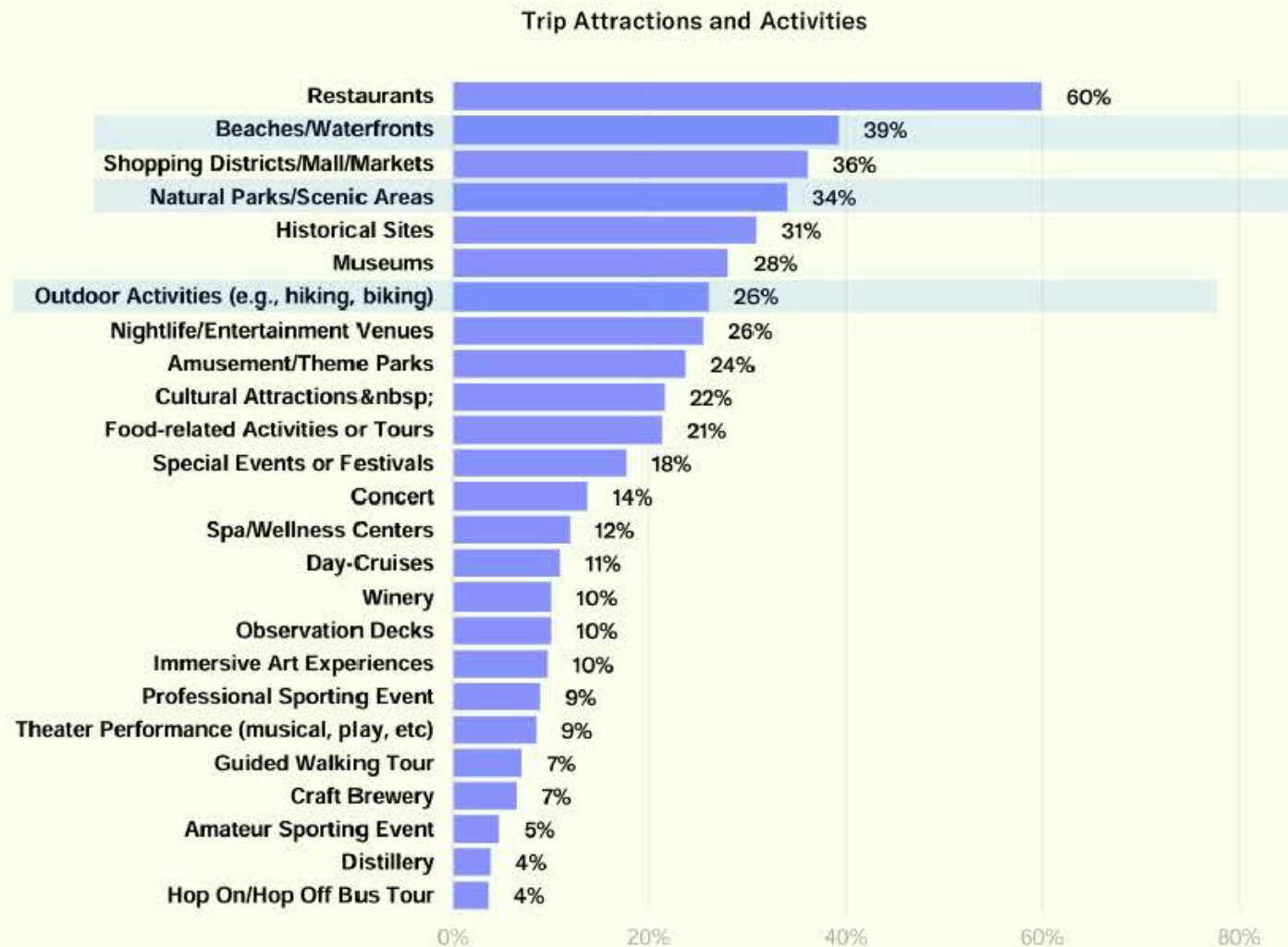
- Camping
- Mountain biking (off road or gravel)
- Hiking (day hikes)
- Hiking (over-night on trail, longer haul)
- Recreational vehicle travel
- Sailing or boating
- Hunting (Big game)
- Hunting (Birds, small game)
- Canoeing, kayaking or rafting
- Fishing (Freshwater)
- Fishing (Saltwater or deep sea)
- Skiing or snowboarding
- Birdwatching – Birding
- Golf

1-in-4 American travelers are Outdoor Enthusiasts

Outdoor Enthusiasts
(in the American Traveling Population)



Outdoor-based attractions are amongst American travelers' top trip activities



The State of the American Traveler

A photograph of a roasted turkey on a platter, garnished with fresh vegetables like lettuce, tomatoes, and blueberries. The turkey is golden brown and sits on a woven basket. To the left, there is a wire basket filled with several round, golden-brown bread rolls. The background is dark and out of focus, with a lit candle visible on the right side.

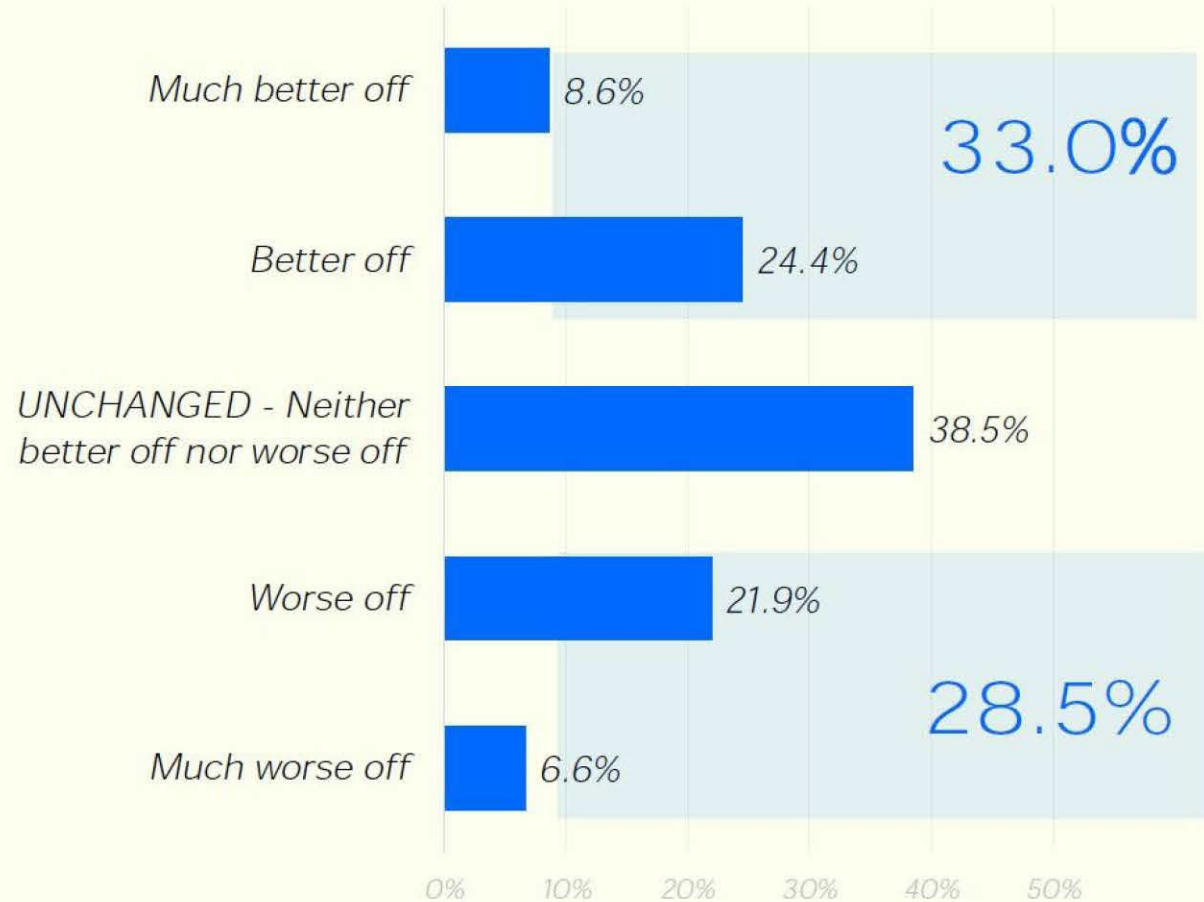
Future Partners

October 2024

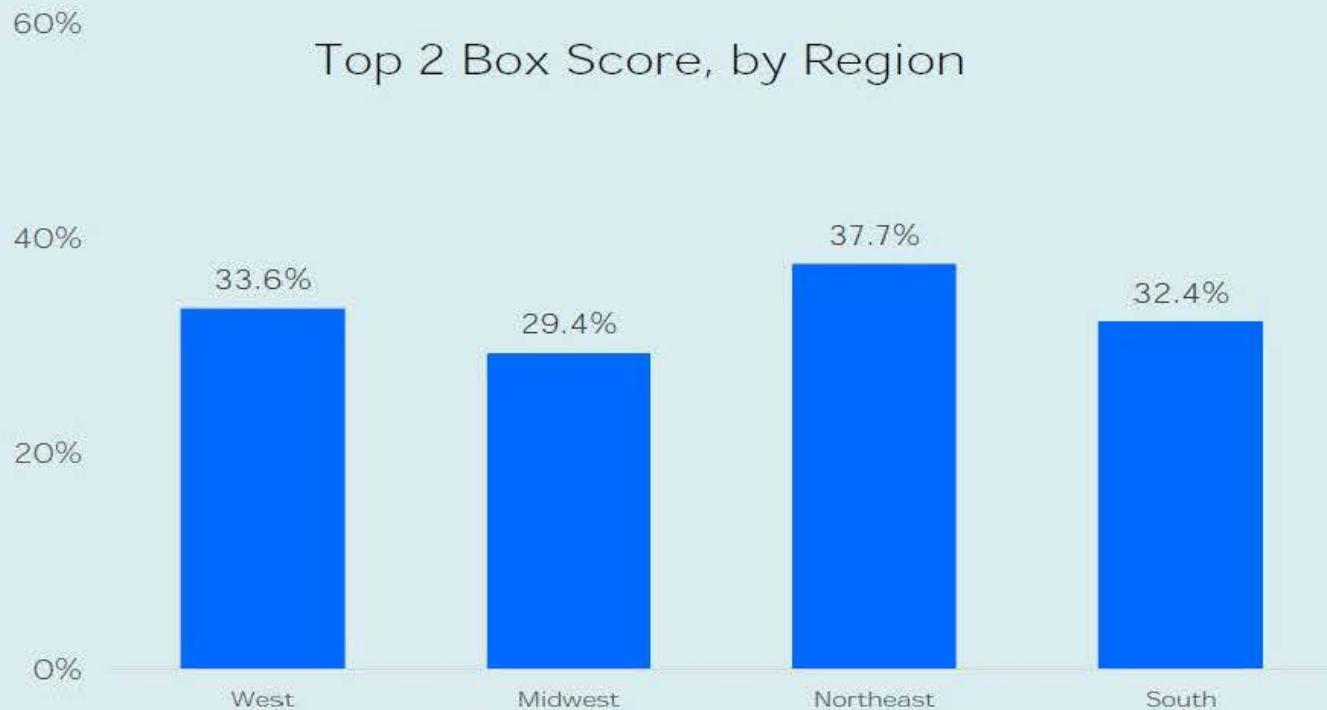
Travelers' feelings about their current finances improved this month.

Question:

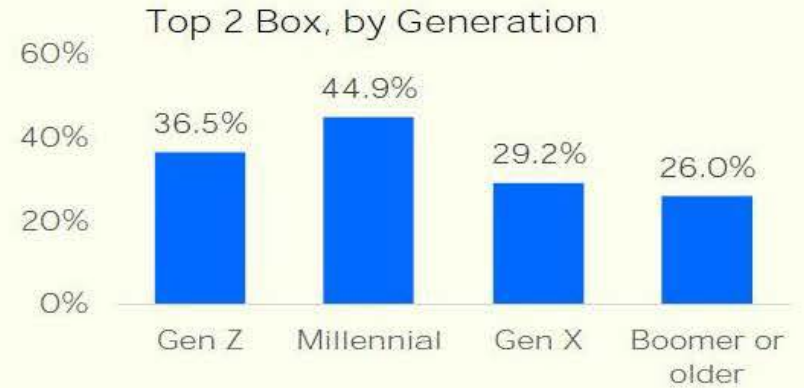
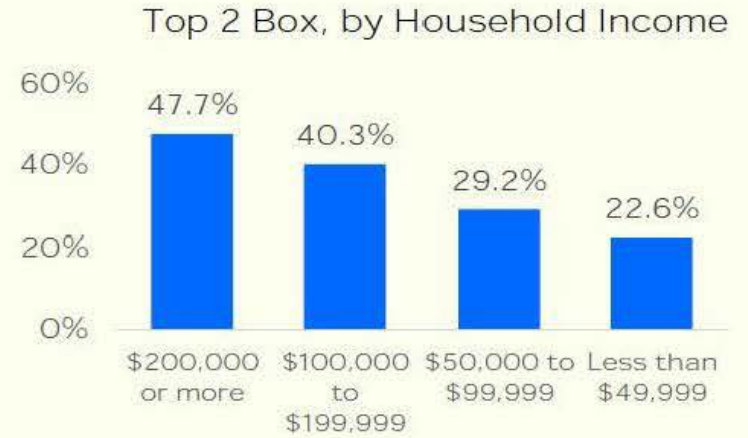
Would you say that you (and your household) are better off or worse off financially than you were a year ago?



Regionally, this metric shows the most strength in the Northeastern United States.



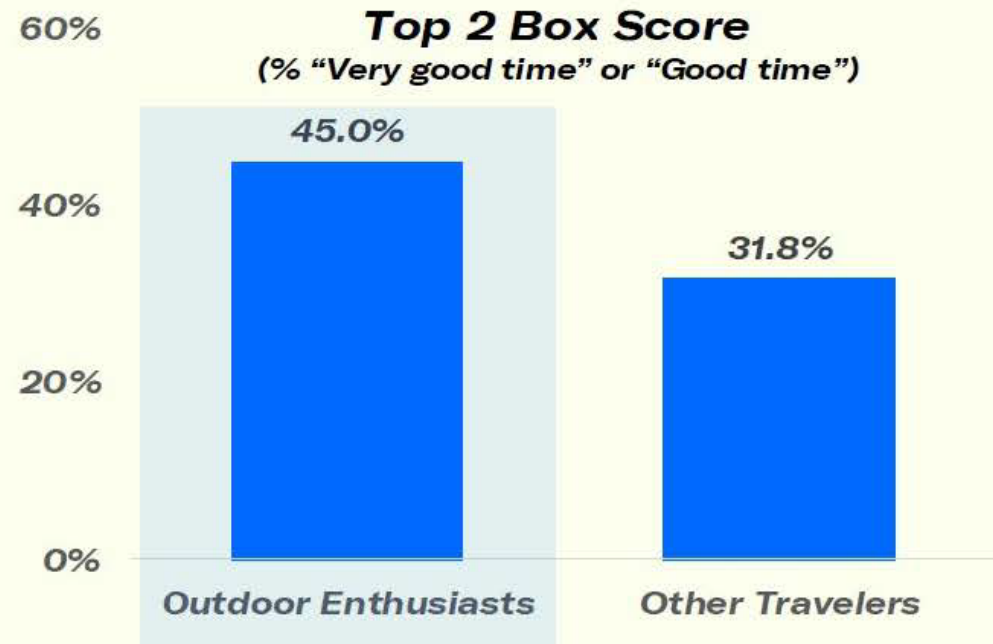
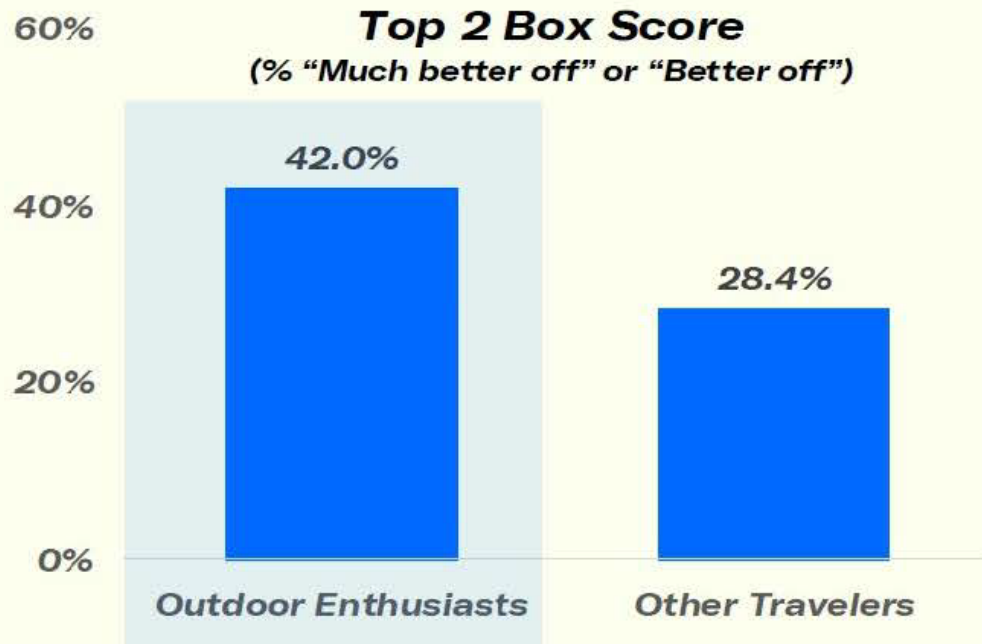
Question: *Would you say that you (and your household) are better off or worse off financially than you were a year ago?*



Outdoor enthusiasts are feeling good about their financial situation and travel spending.

Question: Would you say that you (and your household) are better off or worse off financially than you were a year ago?

Question: Thinking only of your household's finances, do you feel NOW is a good or bad time for you to spend money on leisure travel?



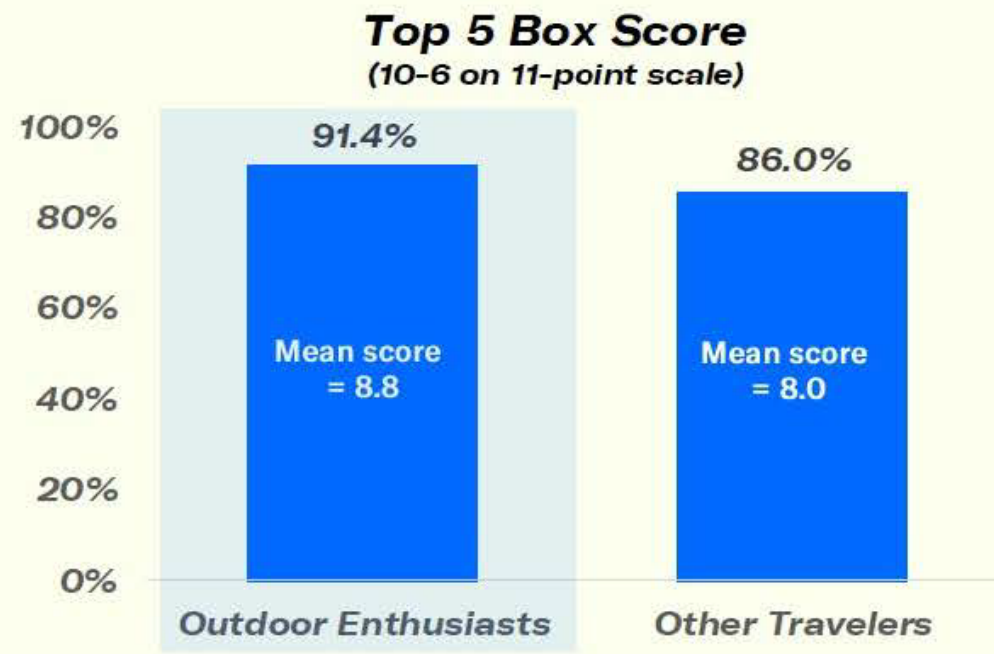
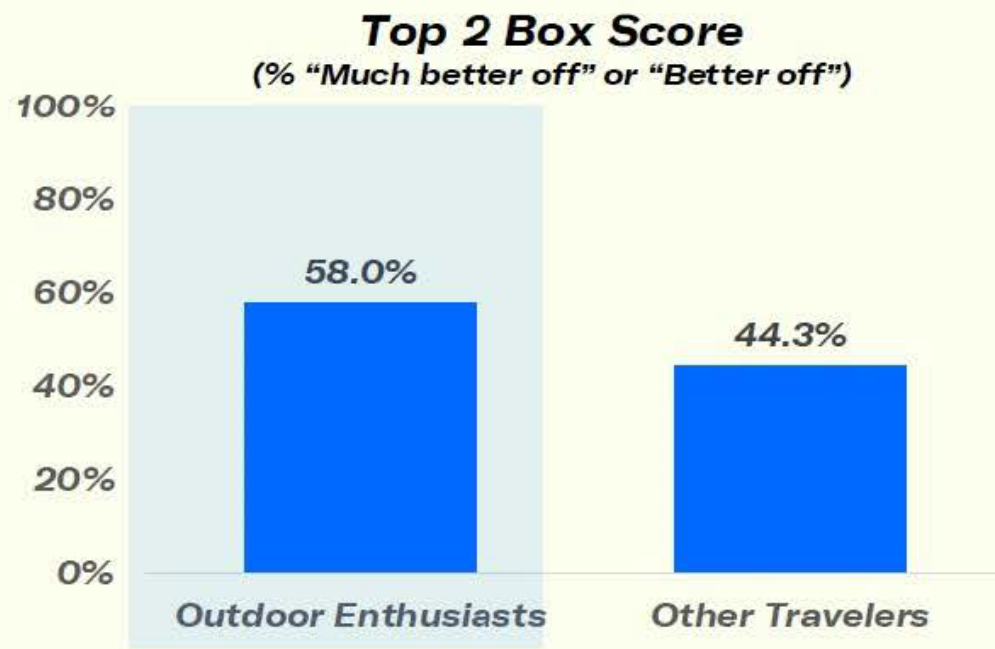
LOOKING FORWARD

2025 OUTLOOK

Outdoor enthusiasts are optimistic about their financial situation and enthusiastic for travel

Question: LOOKING FORWARD—do you feel that a year from now, you (and your household) will be better off financially, or worse off, or just about the same as now? ago?

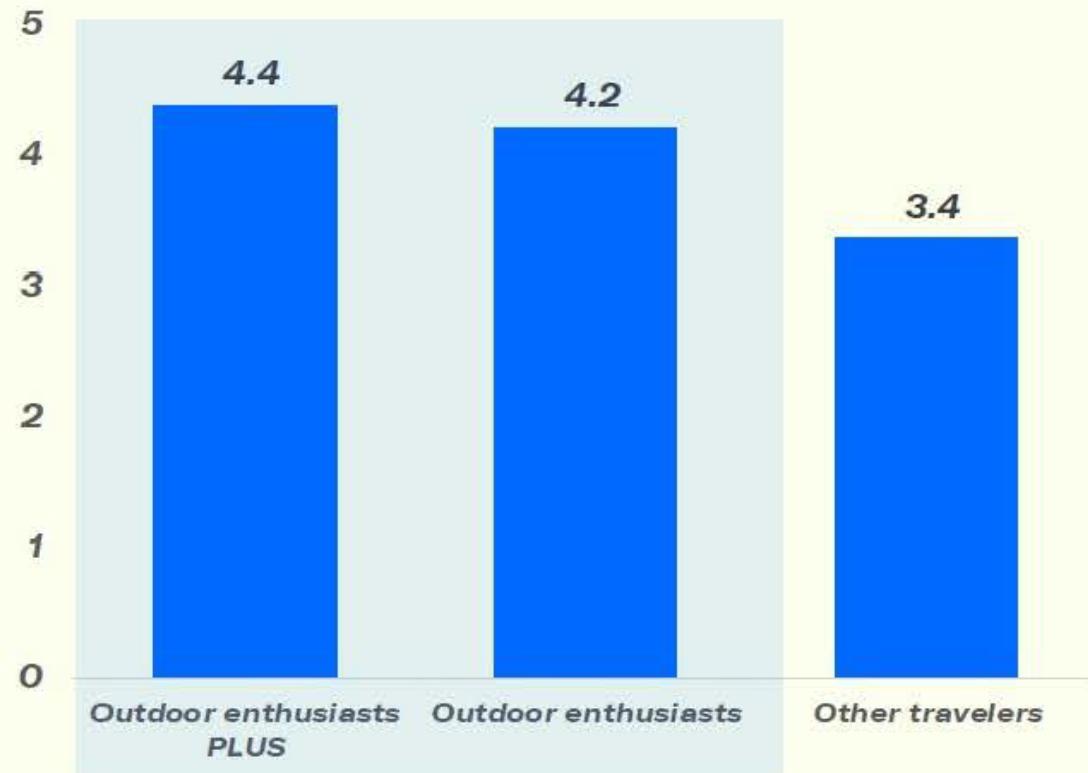
Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Outdoor enthusiasts travel more

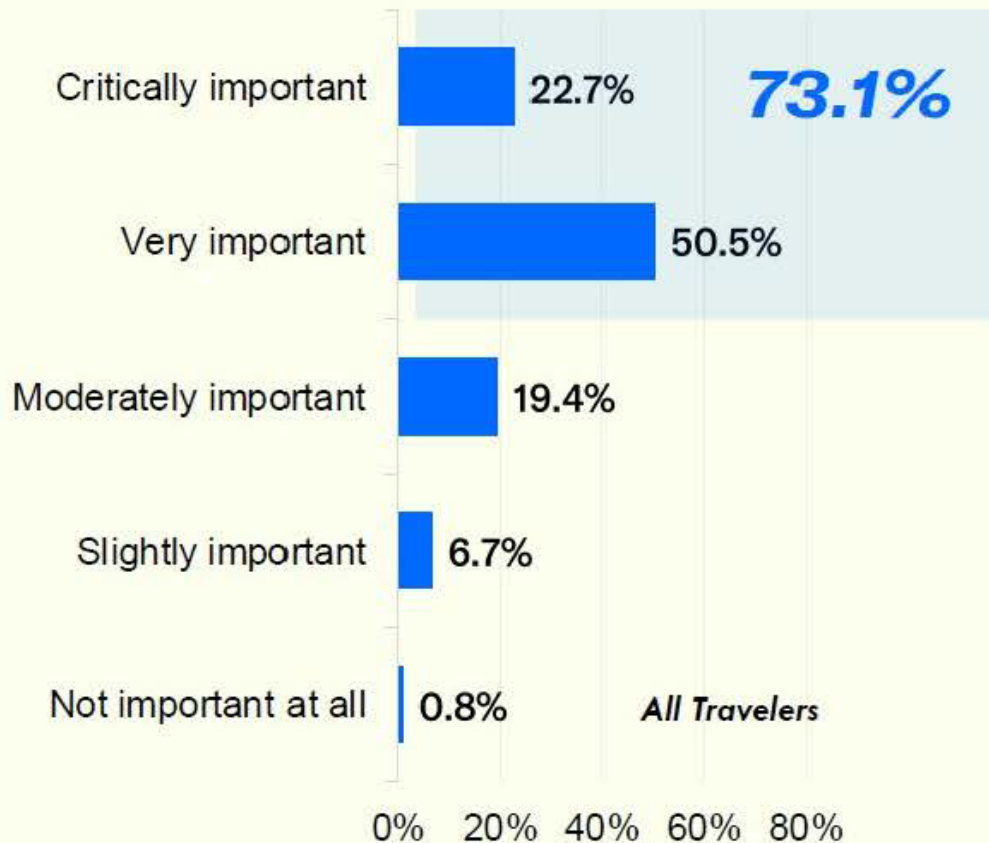
Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in NEXT TWELVE (12) MONTHS?

Expected leisure trips (next 12 months)

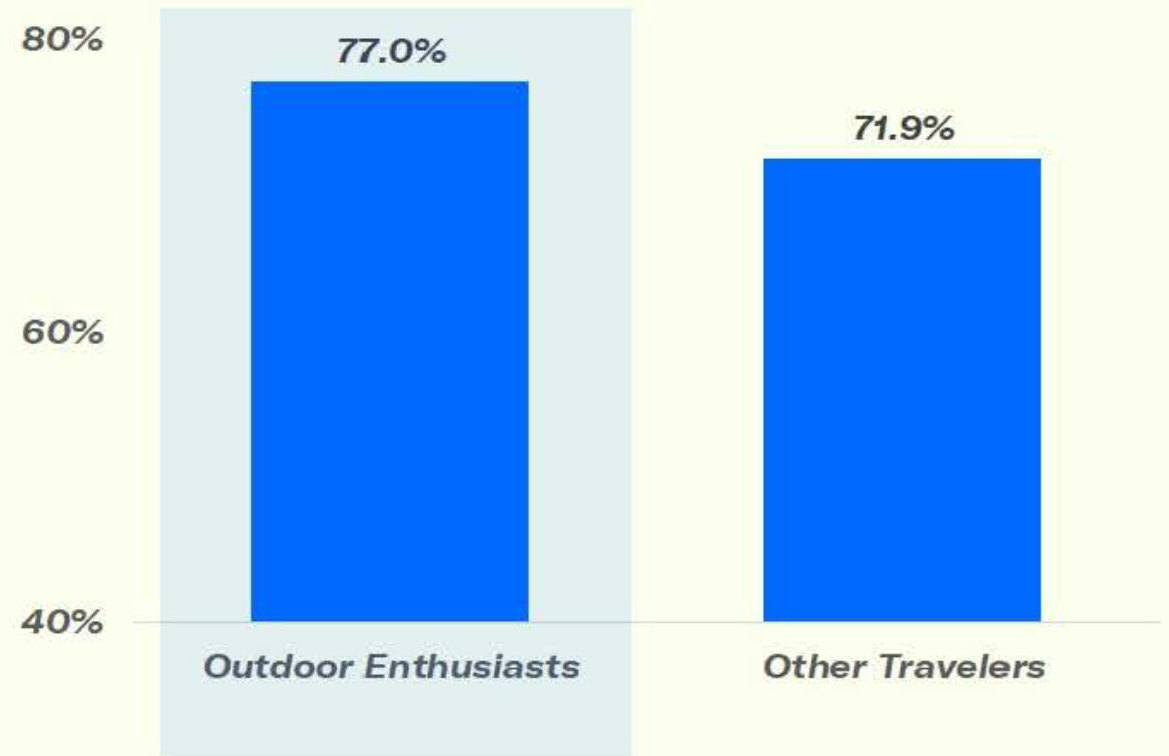


Outdoor enthusiasts also are value-oriented travelers

Question: How important is it to you to get good value for the money when selecting travel destinations, accommodations, and travel activities?



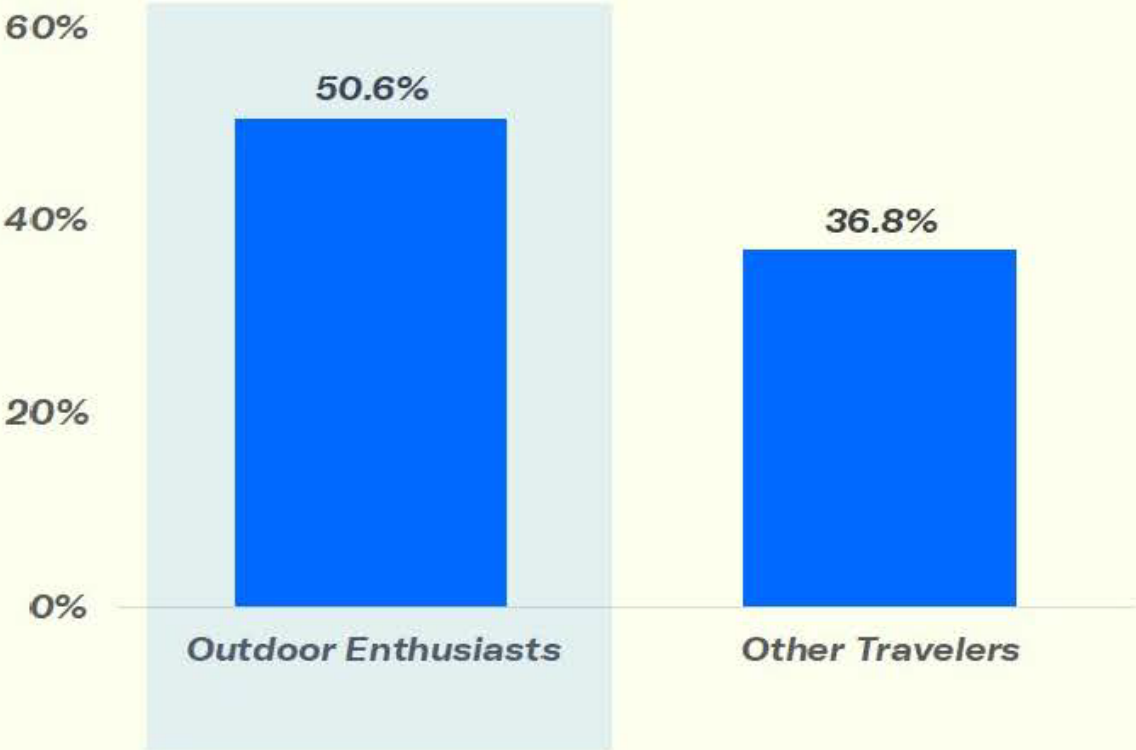
Top 2 Box



Outdoor enthusiasts are more likely to be focusing on budget travel in the coming year

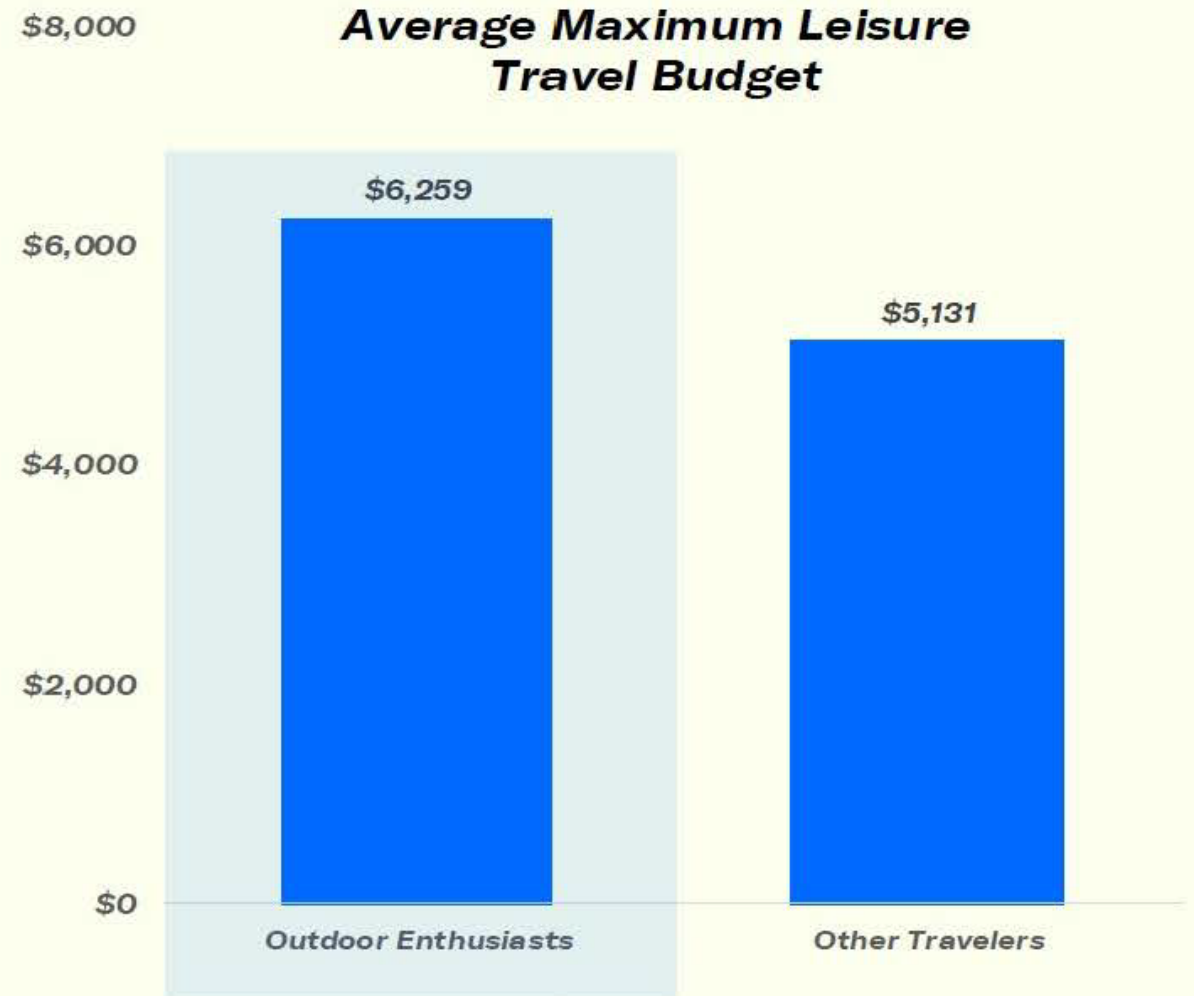
Question: Thinking about your travel during the NEXT TWELVE (12) MONTHS, what travel experiences will you prioritize?

Top 2 Box: Essential priority or High priority



Outdoor enthusiasts are big spenders

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



Thank You
