



Iowa 1993 Research Update......White Longwoods Travel USA

The Economic Impact of U.S. Travel on Iowa Counties 1991.....Blue U. S. Travel Data Center



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Background and Purpose

Background and Purpose



- This report is based on research conducted by Longwoods International on behalf of the Iowa Division of Tourism, Department of Economic Development.
- The purpose of the research is to provide information that will assist the Division in its tourism marketing and communications activities in the coming years.
- The research is based on the 1992 travel year and up-dates an earlier study of Iowa's tourism industry conducted by Longwoods in 1989-'90 as part of TRAVEL USA, a major syndicated study of the U.S. pleasure travel industry.
- As well as updating the earlier study, the 1992 program provides a much more detailed look at tourism in lowa.

Background and Purpose



- The research provides the Division of Tourism with:
 - An examination of lowa's overall competitive position within the U.S. pleasure travel market
 - Information on Iowa's tourism business by region
 - A detailed profile of the lowa vacationer
 - Comprehensive information on the lowa vacation, including trip planning, tripographics, and the vacation experience
 - Detailed data on the places people visit and the things they see and do when they vacation in Iowa
 - A detailed look at lowa's touring vacation the vacation product identified in Longwoods earlier report for the state as providing a good opportunity for increasing lowa's business
 - An update of lowa's tourism **image**, vs. other U.S. destinations, and how that image has changed since it was last evaluated in 1990.
 - An evaluation of Iowa's product and how well it delivers against expectations.



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- a The publication that will assist the Division and the second seco

Highlights

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- a The research provides the Division of Tourism with:
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Sackground and Purpose

Size and structure



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- In 1992, a total of 12.0 million adults 18 plus took an overnight pleasure trip to lowa, giving it a national market share of 1.6%.
- Well over half (56%) of these visitors were in Iowa to visit their friends or relatives (VFR trips), a much higher percentage than is typical.
- Iowa's other important trip types in 1992 were, in rank order:
 - the outdoors vacation
 - the touring vacation
 - the casino vacation
 - the combined business/pleasure vacation
 - the special event vacation
- Eastern Iowa was the main beneficiary of the state's tourism business, receiving substantially more visitors than Central and Western Iowa combined.



Iowa's Sources of Business

In 1992, Iowa drew its visitors mainly from neighboring states in the . Midwest, including, in rank order:

- Iowa itself
- Illinois
- Minnesota
- Wisconsin
- Missouri
- Together these five states accounted for almost 60% of lowa's pleasure 1 travel business.
- Major ADI's sending significant numbers of visitors to lowa included the cities of Minneapolis/St. Paul, Chicago, and Milwaukee.
- Even so, the majority of Iowa visitors came from small and mid-sized cities of half a million or less.

Iowa Vacation Profile



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- Versus that of other U.S. states, the Iowa vacation profile reflects the importance of VFR trips to the state's vacation mix:
 - middle-of-the-road demographics
 - shorter than average vacation planning cycle with less advance booking
 - less reliance on formal information sources, such as travel agents
 - a greater than average number of children in the travel party
 - a high percentage of trip nights pent at the homes of friends or relatives.
- Since lowa is a regional destination, two thirds of visitors arrive by car.
- And since the state gets a fairly large amount of pass-through business, the length of stay is shorter than average.
- The lowa experience is dominated by rural areas and small towns and villages, rather than cities.
- As well, travelers appear not to be discovering the scenic areas and sightseeing attractions of lowa as often as they do in other states.





The lowa experience is dominated by rural areas and small towns and village

- Longwoods earlier report for lowa targeted the touring vacation as a
- vehicle for encouraging growth for lowa's tourism industry.
- Among the reasons for this recommendation:
 - The touring vacation is by definition a trip through a region, making it a natural vehicle for promoting the entire state.
 - Touring vacations are typically planned well in advance, and are leveragable through destination marketing.
 - The touring vacation is a long-haul trip; promoting it would help to develop new tourism markets for lowa beyond its Midwestern base.

The Iowa Touring Vacation



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- In 1989, the touring vacation was lowa's third most important trip type and this continued to be the case in 1992.
- Also as in 1989, Iowa's 1992 touring vacationers tended to be upscale, well-to-do managers and professionals.
- As expected, the Iowa 1992 touring vacation was a well-planned,
 - long-haul trip.
 - Touring vacationers to lowa were much more likely than the typical lowa visitor to:
 - visit Central and Western Iowa

- discover lowa's important tourism attractions, especially such places as:
 - The Amana Colonies
 - Boone and Scenic Valley Railroad
 - Danish Windmill



The Iowa Touring Vacation



- lowa's touring vacationers were also much more likely than other visitors to discover the state's scenic byways and other natural attractions, such as the Loess Hills and the state's many major waterways.
- Despite this, only a minority of them just 36% identified lowa as their main destination.
- As a result, touring vacationers' length of stay in lowa was on average exceptionally short — just 2 nights versus almost four nights for other trips to the state.
- This works out to just 20% of the entire trip, versus 60% for the typical lowa trip and 56% for touring vacations to other states. In 1989, the touring vecation was lowers third most important trip type





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- With an estimated 680,000 touring vacationers passing through the state in just one or two days, there is an excellent opportunity for lowa to increase its tourism business just by convincing these travelers to spend more time in Iowa.
- Actively promoting lowa as a touring destination would help ensure that travelers planned their trip to include more time there.
- The travel "hot buttons" for touring vacationers include, first and foremost EXCITEMENT, a place that offers real adventure and that must be visited at least once in a lifetime, even good goes used peeu aduncan
- The ideal touring destination is also a place that the whole family would enjoy, and offers scenery that is both beautiful and unique.
- There should also be many attractions and opportunities for exploration 16 and sightseeing along the way, especially things that the traveler is unlikely to encounter closer to home.

Iowa's Tourism Image



- Versus other states, Iowa has a weak tourism image in terms of each
- and every one of these important travel motivators.
- This continues to be true, even though there have been significant improvements since 1990, especially in terms of Iowa's image for scenery and sightseeing.
- Reports of visitors to lowa show that its tourism product is much better than its negative image would lead us to expect.
- This is especially true of two of the most important travel motivators family atmosphere and sightseeing.
 - People who have visited lowa are much more aware that it is a good place for families, including children, to vacation together.
 - And they are much more likely to agree that lowa has interesting cities, as well as small towns and villages, and that there is lots to see and do.

In Conclusion . . .



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- An advertising program is needed to establish a tourism image for lowa that is more in line with its product.
- The campaign should convey a consistent positioning that plays to lowa's important product strength: a great place for families to explore America's heartland.
- The campaign should be directed to the upscale touring vacationers who are already coming to lowa.
- Our earlier research for the state showed that magazine advertising is the medium most preferred by touring vacationers and also the one they find most helpful.

In Conclusion . . .



- There is also an opportunity to encourage the many travelers visiting their friends and relatives in Iowa to use their trip as an opportunity for a real vacation.
- Since VFR travelers rely most strongly on advice from friends and relatives in planning their trip, this is a message that might be delivered most appropriately through advertising in local media to lowans themselves.
- The first step is to establish sufficient budget to support a sustained, consistent advertising program.
- Tourism advertising should not be viewed as a cost.
- It is an investment in the growth of a major industry which will benefit the entire state.



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Market Size and Structure

- In 1992, the number of overnight pleasure trips to lowe by adults 18 years of age or older totaled 12.0 million, resulting in a national market share of 1.5%.
- Most visitors arrived during the fair weather seasons, led by the summer months. Fewer than 10% and the state during the weather seasons to the state during the weather.
- Main Findings
- Well over half of lowe's overnight pleasure trips in 1992 were visits to friends and relatives - a trip purpose which is beyond the reach of standard destination marketing.
- The VER trip plays a much more important role in lowa's trip mix than it does for the typical state.

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Market Size and Structure

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Market Size and Structure



- In 1992, the number of overnight pleasure trips to lowa by adults 18 years of age or older totaled 12.0 million, resulting in a national market share of 1.6%.
- Most visitors arrived during the fair weather seasons, led by the summer months. Fewer than 10% of Iowa vacationers come to the state during the winter.
- For 20% of visitors, a state other than lowa was the main destination of the trip.
- Well over half of lowa's overnight pleasure trips in 1992 were visits to friends and relatives - a trip purpose which is beyond the reach of standard destination marketing.
- The VFR trip plays a much more important role in Iowa's trip mix than it does for the typical state.

Market Size and Structure



Looking at the "marketable" types of pleasure trips, lowa's business was spread across five main segments:

- outdoors vacations
- touring vacations
- casino vacations
- business/pleasure trips .
- special events trips
- These five segments contributed about the same proportion of lowa's . business as the U.S. norm.



Overnight Pleasure Trips to Iowa



24

Total = 12.0 Million

January - March 1.0 Million

October - December 3.3 Million





Iowa's Share of Overnight Pleasure Trips





20%



34

35

Overnight Pleasure Trips By Region





Visits to Friends/Relatives Outdoors Touring Vacation Casino







lowa's 1992 Vacation Mix





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24

Millions of Trip

- Eastern lowa received the lion's share of the state's business, accounting for more trips than the Central and Western regions combined.
- Eastern lowa dominated the state's outdoors, business/pleasure, and, as expected its casino vacation business.
- 60% of Iowa's touring vacations included at least one overnight in Eastern Iowa, but substantial numbers went to Central and Western Iowa as well.
- Only for special event trips did Eastern Iowa really share business in this case with the Central region.

Iowa's Pleasure Travel Business — by Region



- Visits to friends and relatives accounted for more than half of the tourism business in each of Iowa's three regions.
- Of the marketable trip-types, the outdoors vacation was the most common reason for visiting Eastern Iowa, followed closely by casino, touring and business/pleasure trips.
- Special event and touring vacations were the most popular marketable segments for Central Iowa.
- Western lowa drew its marketable business from a diverse mix of segments, led by touring vacations.







* Person trips by adults 18+ over 100 miles round trip including at least one night in a region.





30

Touring Trips — By Region



* Percent involving at least one overnight in a region





* Percent involving at least one overnight in a region



Business/Pleasure Trips — By Region







* Percent involving at least one overnight in a region



Casino 620 600 Touring **Business/Pleasure** 520 Local Excursion 300 290 Special Event City 220 Country Resort 120 70 Cruise 1,000 2,000 3,000 4,000 5,000 0

35

* Trips that included at least one night in Eastern Iowa







37

* Trips that included at least one night in Western Iowa



Who Comes to lowa?



24

Who Comes To Iowa?

- In 1992, Iowa drew most of its business from nearby Midwestern states.
- Those contributing the largest share of lowa's business were, in rank order:

lowa itself Illinois Minnesota Wisconsin Missouri 39

Who Comes to Iowa?



- Significant business also came from California -- the only truly long distance source -- and from other mid-Western states, such as Indiana, Kansas, Michigan, and Colorado.
- The most important ADI's contributing to Iowa's business were both in-state -- Cedar Rapids-Waterloo-Dubuque and Des Moines -- and out-of-state -- Minneapolis-St. Paul and Chicago.
- Iowa also received significant business from Milwaukee, Kansas City and Omaha.
- In spite of the important contribution of major urban centres to its business, a disproportionately large number of lowa visitors came from smaller communities with populations of less than half a million.
- In terms of demographics, such as education, household income and occupation, lowa travelers were quite similar to the U.S. norm.

State Sources of Visitors to Iowa

lowa

Illinois



23

36

40





Top Urban Sources of Visitors to Iowa



Sources of Visitors to Iowa



36



Household Income















lowa

Any State





Tripographics

Any State



Trip Planning



34

pre-paid packages.

- Like most U.S. vacationers, a majority of visitors to Iowa planned their trip well in advance, at least two months ahead of time.
- But due to the prominence of visits to friends and relatives in the visitor mix, they tended to book their travel arrangements much later than the average traveler. Six out of ten made no formal bookings at all.
- By far the two most important sources of information used for trip planning were personal experience and word-of-mouth from friends and relatives.
- Visitors to Iowa made less than average use of formal information sources, such as travel agents.



Tripographics



- A 1992 lowa trip was a short to medium- haul trip in terms of distance.
- Two-thirds of visitors in 1992 traveled less than 500 miles to lowa, which 12 is comparable to the U.S. norm and consistent with the state's distance from its major sources of business.
- lowa visitors remained in the state less than four days, which is shorter than average.
- Group tours played only a minor role on a trip to lowa, though no less so than for the typical vacationer.
- However, relative to the U.S. norm, Iowa visitors were less likely to book pre-paid packages.



Travel Party Size and Composition



- The average size of the travel party to lowa approximately three people - was slightly smaller than the U.S. norm
- Compared to the typical travel party, Iowa vacationers were:
 - less likely to travel with friends

 - more likely to travel alone.
- The average age of the lowa travel party was younger than the norm, because the party included more children and fewer older people.

Transportation and Accommodation



- The vast majority of Iowa visitors arrived in their own vehicle a car, van, truck or RV.
- Use of commercial transportation, particularly air, was much lower than average.
- Relative to the U.S. norm, far more nights spent in Iowa were at the homes of friends and relatives, while fewer were at hotels or cottages.
- This is consistent with the greater role that visits to friends and relatives play in Iowa's trip-type mix.







Booking Cycle









Use of Vacation Packages and Group Tours







1 Night 19 2 Nights 27 18 3-6 Nights 14 8 8 7 Nights+ 10 20 30 % 5 15 25 0 lowa Any State

Nights Away in Iowa

		lowa	Any State	
1	Average Nights In State	3.5	4.2	58







- disco br'blub, went to a theme park, took in a sports event, or attended the Ureatrapetatroas symphony or opera.
- a And visitors to lowa were less likely to seek out historic sites and
- (partmants) cannon un som na sin farten in shart guideni nouron.





Transportation Used to Enter Iowa



The Iowa Experience

- Even so, over forty percent visited a city on their trip.
- Iowa's special events, such as the lowa State Fair, played a role on one sustice will build an one of the lowa State Fair, played a role on one
- The "lowa" which visitors experienced was dominated by rural areas and
- But, with 12 million trips in a year, this translates into substantial
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- he Trip Experience :

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The Trip Experience



- The "lowa" which visitors experienced was dominated by rural areas and small towns and villages.
- Even so, over forty percent visited a city on their trip.
- Regardless of whether the trip is focused on a city or the countryside, lowa's visitors did not seem to take full advantage of what is offered.
- Fewer than average: discovered a scenic drive, went shopping, visited a disco or club, went to a theme park, took in a sports event, or attended the theatre, dance, symphony or opera.
- And visitors to lowa were less likely to seek out historic sites and landmarks, and museums or take a short guided tour.

The Trip Experience



65

- The most popular lowa destinations were, in rank order:
 - Cedar Rapids
 - Des Moines
 - Dubuque
- - The Quad Cities
 - Waterloo/Cedar Falls
 - By far the most popular attraction was the Amana Colonies
 - Iowa's special events, such as the Iowa State Fair, played a role on only a small percentage of trips.
 - But, with 12 million trips in a year, this translates into substantial attendance at such events by tourists.








Shopping on an Iowa Vacation







Sports and Recreation







Other Iowa Destinations



Most Popular Iowa Attractions







Other Iowa Attractions







Events Attended In Iowa



Percent Who Visited an Iowa Welcome Center



34

Longwoods earlier raport for lows targeted the touring vacation as

1992



17



Events Attended in Iowa

Touring Vacations to Iowa

Percent Who Visited an Iowa Welcome Center Visiteral Canie Contares Par 1

The Iowa Touring Vacation



- Longwoods earlier report for lowa targeted the touring vacation as a vehicle for encouraging growth for lowa's tourism industry.
- Among the reasons for this recommendation:
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 - natural vehicle for promoting the entire state.
 - Touring vacations are typically planned well in advance, and are leveragable through destination marketing.
 - The touring vacation is a long-haul trip; promoting it would help to develop **new tourism markets** for lowa beyond its Mid-western base.

The Iowa Touring Vacation



- In 1989, the touring vacation was lowa's third most important trip type and this continued to be the case in 1992.
- Also as in 1989, touring vacationers to lowa tended to be upscale, well-to-do managers and professionals.
- As expected, the Iowa 1992 touring vacation was a well-planned, long-haul trip.
- Touring vacationers to lowa were much more likely than the typical lowa visitor to:
 - visit Central and Western Iowa
 - discover lowa's important tourism attractions, especially such places as:
 - The Amana Colonies
 - Boone and Scenic Valley Railroad
 - Danish Windmill

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- Iowa's touring vacationers were also much more likely than other visitors to discover the state's scenic byways and other natural attractions, such as the Loess Hills and the state's many major waterways.
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 - their main destination.
- As a result, touring vacationers length of stay in lowa was on average exceptionally short — just 2 nights versus almost four nights for other trips to the state.
- This works out to just 20% of the entire trip, versus 60% for the typical lowa trip and 56% for touring vacations to other states.





State Sources of Touring Vacationers





























Iowa Attractions Visited









The Iowa Vacation Experience





Sightseeing in Iowa







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- Also of great importance to touring vacationers is a destination's family alternation be destination and the solide taxily and the sole of the sole
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Iowa's Image

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nelative motivating power for travelers.

Longwoods has analyzed nearly 50 image attributes in terms of their

Vacation Hot Buttons



Vacation Hot Buttons



- Longwoods has analyzed nearly 50 image attributes in terms of their relative motivating power for travelers.
- Here we focus on those attributes that are important to touring vacationers, since the main purpose of a touring vacation — to explore a region — is consistent with the state's marketing goal of attracting tourists to every region of Iowa.
- Touring vacationers are, first and foremost, looking for a vacation destination that is **Exciting** — a place that offers real adventure and that should be visited at least once in a lifetime.

Vacation Hot Buttons



100

- Also of great importance to touring vacationers is a destination's family atmosphere: it should be an enjoyable place to visit for children and the entire family.
- The ideal touring destination should also offer scenery that is both

beautiful and unique, and a variety of sightseeing opportunities.

- Also of importance is a destination's perceived popularity. This attribute has been shown by our research to be driven mainly by awareness of advertising.
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- The termination and the analysis of the subscription of the

lowa's 1992 Image



Iowa's 1992 Image



- This study measured the image of a number of states, including New Jersey, Pennsylvania, New York, Louisiana, Texas, Georgia, Tennessee, Colorado, Utah and California, as well as Iowa itself.
- Iowa's image among the American traveling public in 1992 was considerably below the average of these states on almost all dimensions, including the key attributes of excitement and popularity.
- Iowa's main competitive strength was its hospitality. The state was perceived to:
 - have warm, friendly people
 - be a safe, relaxing place to visit.
- However, hospitality is not at the top of touring vacationers' priority list.

Vacation Hot Buttons

Iowa's 1992 Image



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- The main dimensions on which lowa was felt to be below average include the most important ones to travelers:
 - excitement
 - beautiful and unique scenery
 - sightseeing opportunities
 - popularity
- Iowa's image was also particularly weak with respect to:
 - the quality and diversity of food and accommodations
 - entertainment, including local events, shopping and cultural activities



What Makes a Destination Attractive to Touring Vacationers?











lowa

U.S.















Hospitable vs. Other U.S. Destinations





Food and Accommodations vs. Other U.S. Destinations







Outdoors vs. Other U.S. Destinations













Outdoors vs. Other UP.C. Destinations

lowa's Image — 1992 vs. 1990

Entertainment vs. Differ U.S. Distillations

Iowa's Image Versus 1990



- However, mese areas are of lesser importance to touring vacations
- In Longwoods' earlier report for the state, we identified the same problems based on 1990 data.
- The good news is that, while the same general problem still existed in 1992, there have been some improvements:
 - Iowa was perceived to be a more exciting place to visit than in 1990, though not necessarily more of "an adventure".
 - And the state was also perceived to have scenery that is both more beautiful and unique.
 - Versus 1990, people were more likely to agree that lowa offers interesting sightseeing in both its cites and small towns and villages.

Iowa's Image Versus 1990



- And there was more awareness that Iowa:
 - has interesting customs and traditions
 - is a relaxing place
 - is a good place for boating, water sports and golfing
 - offers a variety of entertainment opportunities
- In 1992, more people believed that they had seen the state's advertising, although this didn't change their impressions of Iowa's popularity.
- There were also striking improvements in Iowa's outdoors image,
- especially for fishing, hunting and viewing wildlife.
- However, these areas are of lesser importance to touring vacationers.

Iowa's Image Versus 1990



- On the negative side, the state was seen as a less affordable vacation destination.
- This is most likely due to the impact of the recession, since lowa is fairly far away from many of the largest population centres and is therefore a fairly expensive place to reach.
- In 1992, Iowa was also less positively regarded for the quality of its hotels and resorts.
- a Overall, while most of the Made and the most of the data show that lowe able the data show the lower able the data show the data sh

Iowa's Image Versus 1990



- Overall, while most of the image changes are in the right direction, the data show that lowa has major image weaknesses:
 - lowa is still far below average in terms of excitement, the most important travel motivator.
 - The state continues to fall short on each of the other dimensions which top people's priority list - family atmosphere, scenery, sightseeing and popularity.
 - lowa's main strength hospitality is not sufficiently important to vacationers to give lowa an edge in a highly competitive market.

EXCITING

SCENERY

SIGHTSEEING

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Iowa's Image - 1992 vs. 1990

FAMILY ATMOSPHERE





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Iowa's Excitement — 1992 vs. 1990









Iowa's Scenery — 1992 vs. 1990







Iowa's Hospitality — 1992 vs. 1990 7) HOSPITABLE Good Place to Relax Warm/Friendly People Safe Place 70%



Iowa's Food & Accommodations — 1992 vs. 1990











Local Festivals/Events





Iowa's Product Delivery

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Iowa's Product Delivery



In this section we will take a more specific look at how visitors to lowa evaluate the tourism product the state delivers:

- first, by comparing recent visitors' image of lowa to that of people who have never visited there
- and then, by comparing recent visitors' evaluations of their lowa trip experience versus similar evaluations of people who have visited other states
- The image of recent visitors to lowa will be determined mainly by the type of vacation experience they have had.
- That of people who have never visited the state will be governed by word-of-mouth and whatever they have recently seen or heard about the state in the media, including the state's advertising.



Product vs. Image



state in the media, including the state's advertising

- The data show that the image recent visitors had of lowa after their trip was much more positive than that of those who had never visited the state in the following areas:
 - excitement and uniqueness
 - family atmosphere and hospitality
 - sightseeing and entertainment
 - travel costs
 - food and accommodations
 - sun and sand
- The only dimension on which Iowa's product delivery fell short of its image was outdoors recreation, particularly with regard to fishing and opportunities for viewing wildlife.

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Product Delivery



- Turning now to visitors' rating of their trip experience, we find that, consistent with their image, Iowa visitors had a positive experience -largely in the "good" range.
- Versus other states they had recently visited, visitors rated lowa as above average for:
 - the friendliness of people
 - the quality of food and accommodations
 - value for money
- However, Iowa fell far short of the typical destination for sightseeing and attractions.
- Even though lowa's sightseeing and attractions exceed their expectations, travelers appear not to rate them as highly as those of other states.
Product Delivery



- As a result, the experience of visitors to lowa was overall somewhat less positive than that of travelers generally.
- As was noted earlier, visitors to lowa are less active in terms of sightseeing than visitors to other states.
- It's not necessarily that the product isn't there.
- Instead, travelers may not be taking advantage of it.
- This may be in part because so many lowa visitors are there mainly to see their friends and relatives.
- They therefore have other priorities for their trip than sightseeing.



























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Method



- The Iowa 1992 tourism research program included two components:
 - The Visitor Profile Study
 - The National Travel Study, a shared cost TRAVEL USA Monitor research vehicle
- The National Travel Study provided national norms against which the lowa travel profile as well as the lowa touring vacation is compared in this report.
- It also provided data on Iowa's tourism image versus other tourism destinations, including the states of New Jersey, New York, Pennsylvania, Louisiana, Georgia, Texas, Tennessee, Colorado, California, and Utah.
- This imagery battery was comparable to that used in our 1990 TRAVEL USA image study.

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Method



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- In both studies, travelers whose round trip was 100 miles or more were
- identified using a quarterly survey of 50,000 households.
- In the National Travel study a questionnaire was mailed to a representative sample of U.S. travelers who reported at least one trip in a period.
 In the Iowa Visitor Profile study, the questionnaire was mailed to travelers who reported at least one trip to Iowa in a period.
- Mailout occurred for the National Travel study in the fall of 1992 and winter of 1993, and of the Iowa Visitor Profile Study in the early spring of 1993.

Method



- In both studies respondents within a household were selected randomly to ensure a representative sample.
- Response rate for the National Travel Study was 80%; that for the Iowa Visitor Study was 79%.
- The final sample for the Iowa Visitor Study included 558 travelers to Iowa.
- The sample for the National Travel Study totaled 1,679.
- In both studies data were weighted prior to analysis to ensure that they were representative of U.S. travelers or travelers to lowa in terms of census division of residence, community size, household income/size, age, and sex.
- Data were also weighted to ensure that the sample reflected the main purpose of all trips reported either nationally or to lowa.

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Appendix: The Questionnaire

		8a. How long before you took this trip did you start planning it? (Check ONE Box In Colum	mn 8a Below)
		8b. And how long before you took this trip did you start booking it? (Check ONE Box In C "8a" "8b" Started Planning Started Booki	olumn 8b Below) ng
		More than 1 year in advance	E del constant a series
		6 to 12 months	
		3 to 5 months	
		1 month or less	
		Did not book anything in advance	Dubuque appudud
		8c. Which of the following sources of information did you use to plan this trip? (Check ALL	. That Apply)
		o1 A travel agent 10 Radio	
		A company that specializes in group tours	
		M An auto club 13 Books	
		as A hotel or resort	was as trianda
D	would like you to answer some questions about an analytic to any	a A goveniment tourism once is Advice itorn relation on the second seco	nce from past visit(s)
th	hat included lowa.	An association/club 17 Other (Write In):_ 9 Television 18 None of these	the second in second second
1.	What was your main destination on this trip that is, the place where you spent the most time? (Check ONE Box)	9a. Was this a pre-paid package trip?	
2:	2 Another state	Yes - (CONTINUE)	
	how many vacations of each type (including this trip) did you take in Struction letter. Using just one definition for each trip you took.	2 🗌 No - (SKIP TO QU. 10a)	
	which you visited Iowa? (Write In #'s In Column 2a Below, Write in "0" If You Took No Trips Of That Time Of That Time	9b. What did this package include? (Check ALL That Apply)	
20	Using the same definitions, which one comes closest to describing the main purpose of this trip that is the user till	1 🔲 Transportation	
20	Which of these twees a function of the section with the section of the section with the section of the section		
	Column 2c Below)	3 □ An meals	
	"2a" "AL"	s 🗍 Entertainment	
	# Of Trips To Iowa In:	10a. This question is about the transportation you used during this trin. Please use Column 10	Da to indicate which type(s)
	A Visit To Friends Or Belatives	of transportation you used inside lowa on this trip. (Check ALL That Apply In Column	1 10a)
	A Combined Business/Pleasure Trip	10b. Which type of transportation did you use as you entered lowa? (Check ONE Box In Co	umn 10b)
	A Touring Vacation	If You Started This Trin Inside Iowa And Remained There Check Here .	Skin To Ou 11
	An Outdoors Vacation	in fou orange this trip inside fowa And Hemanied There, oneck here in And	Skip to dd. 11
	A Summer Country Resort Vacation	10c. And which type of transportation did you use as you left lowa? (Check ONE Box In Co	lumn 10c)
	A Casino Gambling Vacation	"10a" "10b" " Inside Iowa Enter Iowa Lea	10C"
	A City Trip	Personally Operated Vehicles:	TOTOTA
	A Cruise Vacation	Your own car or that of a friend/relative	01
	A Theme Park Vacation	Your own truck van or B V m m m	22
	A Special Event Vacation	Rental truck, van, or R.V.	04
	A Local Excursion	Other	os
3.	Please write in the total number of nights you were away on this trip		
	(Write In # Of Nights):	Commercial Transportation:	
4a.	Was this trip a combined business/pleasure trip?	Plane	27
		Bus	
4b.	Which of the following best describes the business purpose of this trin? (Check ONE Party of the string)	Other	10
	Business meeting	11 How many nights did you around in each of the following turge of accommodations just in la	11
	Convertion	Including A "0" For Types Of Accommodations You Did Not Stay In)	wa? (write in # Or Nights
	Trade show		
40	S Accompanied spouse/pleasure only		
40.	Of the total number of nights away, how many were spent in lowa just on the pleasure component of this trip?		
Fo	(write in #):	Dude ranch	
Jd.	Not Forget To Include Yourself	Bed and breakfast	
	Under 18	Time sharing unit	
	18 - 24	Rented camporound/trailer park site	
	25 - 34	Rented condominium unit	
5b.	In addition to yourself, which of the following and the	Rented house, cottage or cabin	
	That Apply)	Your own house/cottage/cabin/condo/campsite	
	Spouse/partner Other relative(s)	Home/cottage/cabin/condo/campsite of friends/	
	2 Child(ren) 5 Friend(s) 6 Business associate(s) 7 No one. I traveled	relatives not paid for	
6	Approximately how many the (Other	
	Index 100 miles from home did you travel to get to lowa on this trip? (Check ONE Box)	12. In comparison to other states you have recently visited, please rate lowa for (Check ONE I	Box For EACH Statement)
	2 □ 100 - 299 miles 3 □ 300 - 499 miles 5 □ Over 1,000 miles	Above B	elow
7a.	On this trip was your immediate travel party part of a larger and in the	Superior Average Average Av	erage Poor
	Yes - (CONTINUE)	b. Quality of food	
7b.	Did your immediate travel party travel as part of an analytic (SKIP TO QU. 8a)	c. Quality of accommodations	4 5
	Yes	C. Friendliness of people	
	2 🗌 No	f. Value for money 1 2 3	4 5

1	Ja.	spent time in during this trip. (Check Spent Time On This Particular Tr	k ALL T	hat Apply in Colu	umn 13a Belov	w. Check ONLY	The Places	Where You	18.	In this question how much yo "1" means yo	u agree or c u do not ag	ke you to giv disagree that pree at all that	e your pe each of th at lowa ha	rsonal impl ne following is that chara	ressions of statements icteristic and
1	13b.	Now use Column 13b to indicate ho In Column 13b Below)	ow many	y nights, if any, yo	ou spent in eac	h of the places yo	ou visited. (Write In #'s		Even though lowa I am inte	you may not erested in.	t have exper	ienced all se what y	the activitie you have se	s described
			13a"	"13b"			"13a"	"13b"		only when yo	u have no in	latives as w	ell as you at all of lo	wa on a par	ticular dime
		S	Fime	# Of Nights			Time	Nights				1			
		Eastern Iowa	01	#	Pella		13	#		Do Not			RATIN	G SCALE:	
		Dubuque	02	#	Lamoni	· · · · · · · · · · · · · · · · · · ·		#		Agree			-		
		Quad Cities	03	#	Mason City/C	Clear Lake	15	#		1	2 3	4	5	6 7	8
		Cedar Bapids	04	#	Other Places	s in Central Iowa .		#					le le	owa	
		Amana Colonies	05	#			A C'In		I.	Distance:			1	VI	I. Variety/
		Waterloo/Cedar Falls	06	#	Western low	va	17	#		Is not too far awa	y to conside	er for			Has lots
		Kalona	07	#	Okoboji Area	1	18	#		another vacatio	on no				Has inter
		Other Places in Eastern lowa	08	#	Missouri Vall	ey	19	#	П.	Weather:	alimata				Has inter
					Walnut			#	Ш	Scenery:	climate				Is an exc
		Central Iowa	09	#	Sioux City			#		Has truly beautifu	I scenery				The casi
		Ames	10	#	Council Bluff	S		#		Has unique scen	ery unlike ar	nywhere else			Has exce
		Des Moines	11	#	Clarinda		23	#		Is a natural, unsp	oiled area				Is great f
		Knoxville	12	#	Other Places	s in Western Iowa	24	#		Is wild and under	eloped		·······		Has grea
22.1	13c.	Which of the following places did yo	ou perso	onally see, visit or	r experience in	lowa just on this t	trip? (Check	k ALL That	١٧.	The cost of gettin	n there is af	fordable			Has inter
		Apply)	111							Offers good vaca	tion packag	es			Is noted
		In Eastern Iowa	In Ce	ntral lowa	cite in 107 if Yo	In Wester	rn Iowa			A vacation there	is excellent	value for the	money		Has inter
		M Hoover Library	05 4	Adventureland Par	rk	11 Dani	sh Windmill		۷.	Food and Accor	nmodations	<u>s:</u>			Has warr
		∞ The Star Clipper Dinner Train	07	State Historical Bu	uilding		le Martin Tra	ain		Has elegant, sop	histicated rea	staurants		VI	II. Familiari
		o₄ I he Great River Road		Addison County C	Valley Railroad	s 13 Ine	Grotto e of these			Is noted for its un	inue local cr	pensive			Is a well-
12	adv) :					(Charle All The	Annla			Has first-class ho	tels				is a popu
	14.	which of the following events ald yo	ou atter	o just during this	s trip to lowa?	(CRECK ALL TR	at Apply)			Has first-class re:	sorts			IX	Atmospi
		In Eastern Iowa	in Cel	owa State Fair		In wester	rcade			The accommodat	lions there a	ire expensive			A vacatio
		02 Old Threshers Reunion	10 F	Ruan Grand Prix		18 Glen	n Miller Fest	tival	VI.	Sports Amenitie	<u>s:</u>				Is an exc
		03 Iowa Festival	11	Pella Tulip Time			ey Rodeo			ls a great area to	r swimming	••••••			Is a good
		∞ National Cattle Congress Fair	13 N	Adison County Co	overed Bridge Fe	estival 21 Clay	County Fair	102		Is a great area to	r boating an	d water sport	s		Is a good
		os Steamboat Days	14	National Sprint Ca	r Championshi	p 22 Oran	ige City Tuli	o Festival		Offers excellent fi	shing	·····			Children
		Bix Beiderbecke Jazz Festival	15 N	lational Balloon C	lassic	24 Waln	nut Antique V	Valk		Offers excellent h	unting				Provides
		A City Tom Stream and Stream		C. Personal Stre	de salarra de la	25 None	e of these			Is a good area for	viewing wild	dlife/birds			ls a place
1	5.	Which of the following things did you	person	ally see, visit, or ex	xperience in lov	waonthis trip? (C	heck ALL T	hat Apply)		is a great place to	go camping	g			in their
		on Wilderness areas	06 A	n ethnic commun	nity 11	Small towns/villa	ges			is great for goller.		••••••			is a place
		∞ Rural farming areas	07 A	hiking trail	12	Friends/relatives			19a.	Many U.S. sta	ites, cities, a	and foreign o	countries s	sponsor adv	ertising pro
		Rivers		Scenic by-way	/ 13	Snopping Interesting buildir	oos/architec	ture		This advertisin	ng is promoti	ing the destin	nation its	elf, rather th	an specific h
		05 Unique Indian cultures	10 A	city	15	Different foods un	nique to this	area		any such auvi		he state of it	wannine	past six mo	interis :
		chidia In 201 Nighton Co			16	None of these				18	es - (CONT	FINUE)			
b. 1	6.	Which of the following things did yo	ou visit o	or participate in o	n this trip whi	le in Iowa? (Che	eck ALL Th	at Apply)		2 🗋 1	10 - (SKIP 1	0 00. 200)			
		on A state welcome center	19 F	lea market	3	Sunbathing	100		19b.	Where did you	see or hea	ar this advert	ising? (C	heck ALL T	hat Apply)
		B A riverboat cruise		og race	3	Sailing	ıg			,	Aanazine				
		A landmark	22 H	lorse race		County/state	park			2 0 1	Vewspaper				
		Museum/science exhibit	23	asino gambling	Pominceal 14	Birdwatching	ife			3	ladio				
		or Art gallery	25 A	n antique store	4		ine .			*	elevision				
			26 J	ogging/running	4				19c.	Did you call o	r write for in	formation on	lowa as a	a result of se	eeina or hea
		10 Arts or crafts fair	27	lsed a sauna or h	not tub 4	Fishing					100				
		11 A county fair	29	Bicycling	4	Hiking			10.1	- L -				21	
		13 Other holiday festival	30 C	ennis	1204	Back-packing	9		19d.	Did this adver	lising have a	a positive inf	iuence on	your decisi	on to vacati
		14 Theme park	32 H	lorseback riding	5	Ice skating				1 🗆 🛛	Definitely dic	d ·			
		15 Bar/disco/club	33	lot air ballooning	atta shaq yalisys	Tobaganning	im).			2	robably did	ht not have			
		music concert	35	Swam in a lake or	river 5	None of thes	in)				Probably did	not			
		17 Theater/dance/symphony/opera	36 🗌 V	Vater skiing		sted house, collar				5 🗌 🕻	Definitely dic	d not			
		18 Protessional/college sports event							200						
1	7a.	Prior to this trip, had you ever taker	n any ty	pe of pleasure trip	p to lowa?				20a.	Apart from thi	s trip, which	of the follow	ing activit	ties have yo	u personally
		1 🖸 Yes - (CONTINUE)	122							(CHECK ALL	nat Apply)			•	
		2 🗌 No - (SKIP TO QU. 17	7c)							01 🗌 🕻	ar race		∞□ Li	ve theater	
1	7b.	How many pleasure trips have you	taken te	o lowa in the pas	t two years?	(Write In #):	Sugara d				Professional	sports even		pera	
1	7c.	How likely do you think you will be	to take	another vacation	to lowa in the	next year? (Cher	KONE BO	x)			Sambling ca	isino	12 R	ock concert	
		1 Definitely will						~,		05 1	lational/stat	te park	13 C	lub offering	live music
		2 Probably will									theme par	k		useum	
		3 🔲 Might or might not								08	Symphony c	oncert	16 Z	00	
		Probably will not Definitely will not													
				D					20b.	Please indicat	e your	AGE		-	SEX: 1
									C Cop	right 1993 Longwoods Inter	national				

. .

s of lowa as a vacation destination by terms me ents applies. Use a 10-point rating scale, where and "10" means you agree completely. bed in the statements, it is your impressions of read in advertising, books, or magazines, or to answer the following questions. Write in "0" imension mension.

SCA	LE:			Agree	No	
	7	8	9	10	0	
a						lowa
_	VII.	Variety Has lot Has int Has int Has int	/Cultu s of thi erestin erestin	ral Activities/ ngs to see and g architecture g cities	Heritage: do	
-		Is an ex	cellen	t place to go s	hopping	
		The ca	sinos ti	here are excitil	ng	·
_		Has ex	cellent	museums and	art galleries	
		Is great	t for the	eatre and the a	irts	
-		Has gre	eat live	music	s and events	
		Has we	ell-knov	vn landmarks.	s, and events	
-		Is noted	d for its	history		
		Has int	erestin	g local people		
		Has wa	arm, frie	endly people		·
	VIII	Has Int	erestin	g customs and	traditions	
	vin.	Is a we	Il-know	n destination		
-		is a por	oular d	estination for v	acationers	
		loften	notice a	advertising for	this place	
-	IX.	Atmos	phere:			
-		A vacat	tion the	ere is a real ad	venture	
		Is an ex	citing	place		
		Is a goo	od plac	e to relax		
-		Is a sat	e place	to travel		•
		Is a goo	bo plac	e for a family v	acation	·
_		Provide	es a uni	ique vacation	experience you	
_		Is a pla	Ce eve	ryone should v	visit at least once	
-		is a pla	ce l'd r	eally enjoy vis	iting again	·

promoting themselves as tourism destinations. fic hotels, resorts, or attractions. Have you seen

hearing this advertising?

cation in Iowa? (Check ONE Box)

ally participated in the past year?

17 Snow skiing 18 Water skiing 19 Tennis 20 Golf 21 Bowling 22 None of these

National Family Opinion, Inc.

Male 2 Female

THE ECONOMIC IMPACT OF U.S. TRAVEL **ON IOWA COUNTIES** 1991

A Study Prepared for lowa Division of Tourism by the U.S. Travel Data Center June, 1993

		and the local grant with the second	
	Carrier and a company of the second		

- 0 of 4.9 percent from \$2.55 billion spent by U.S. travelers in 1990.
- 0
- 0 traveler spending.
- 0 the \$404.8 million in 1990.
- 0
- 0 state nonagricultural employment.
- 0 in 1991.
- 0 revenue, 4.2 percent of all lowa state tax collections in 1991.
- 0 generated by travel spending.

EXECUTIVE SUMMARY

Direct U.S. travel expenditures in Iowa in 1991 totaled \$2.68 billion, an increase

Polk County received \$621.4 million in direct travel expenditures in 1991.

Almost \$427.6 million in payroll income or earnings was directly generated by U.S.

Payroll income directly generated by traveler spending increased 5.6 percent over

U.S. traveler expenditures directly generated 46.1 thousand jobs within the state, 3.7 percent of total state nonagricultural employment of 1,236.5 thousand jobs.

lowa's employment directly generated from U.S. travel spending increased by 0.6 percent from 1990, slightly lower than the 0.8 percent rate of increase for total

On the average, every \$58,151 spent in Iowa by U.S. travelers generated one job

Direct U.S. traveler spending generated more than \$146 million in state tax

Local tax revenue generated through direct U.S. travel spending totaled nearly \$32.2 million during 1991, 1.6 percent more than the 1990 local tax revenue

Preface

This study was conducted by the U.S. Travel Data Center for the Iowa Division of Tourism. The study provides 1991 estimates of U.S. travel spending in each of the 99 counties in Iowa, and employment, wage and salary income, state tax revenue and local tax revenue generated by this spending.

A number of individuals assisted in the completion of this work. Special thanks are due to Nancy Landes, Marketing Manager, Iowa Division of Tourism for providing data essential for the completion of this report.

> U.S. Travel Data Center Washington, D.C. June 1993

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The purpose of this study is to provide preliminary estimates of the economic impact of U.S. travel and tourism on each of the 14 counties in Iowa during 1990. These estimates are produced through the use of the County Travel Economic Impact Model, a computerized economic model producing estimates of travel spending at the county level, and the employment, wage and salary (payroll) income, state tax revenue and local tax revenue generated by this spending.

The County Travel Economic Impact Model is an extension of the U.S. Travel Data Center's Travel Economic Impact Model (TEIM) initially developed in 1975 for the U.S. Department of the Interior to indicate the economic value of travel and tourism to states and counties. The original TEIM was revised substantially based upon the U.S. Census Bureau's 1977 National Travel Survey and 1977 Census of Service Industries and Census of Retail Trade. In 1986, the model's time series was adjusted to fit business receipts and payroll data available for each state from the 1982 Census of Service Industries and Census of Retail Trade. In 1987.

The TEIM is based upon national travel surveys conducted by the U.S. Bureau of the Census and the U.S. Travel Data Center, and expenditure data developed by the Bureau of the Census, the Data Center, various federal agencies and national travel organizations each year. A summary of the methodology appears in Appendix A.

The following preliminary estimates of U.S. travel's economic impact in Iowa during 1991 are based upon the most recent version of the TEIM and data available from the U.S. Census Bureau and other sources. These estimates are not comparable to those published in previous years, although revised data for 1986 through 1990 appear in this report.

This report presents estimates of the total impact of U.S. traveler spending in Iowa. The total impact of U.S. travel on Iowa's economy is comprised of the direct, as well as the indirect and induced measures of U.S. traveler activity. The total impact is measured by dollars generated in expenditures and earnings, and by jobs generated.

The estimates provided in this report represent expenditures by U.S. residents traveling in Iowa. This includes both state residents and out-of-state visitors traveling away from home overnight, or on day trips to places 100 miles or more away from home during 1991. Travel commuting to and from work; travel by those operating an airplane,

INTRODUCTION

bus, truck, train or other form of common carrier transportation; military travel on active duty; travel by students away at school; and travel by foreign visitors, are all excluded from the model. These estimates are based upon a generally conservative methodology. For example, foreign visitor spending in the state and its impact is excluded.

This report contains preliminary estimates of U.S. travel expenditures in the state during 1991, and the employment, payroll income, state tax revenue and local tax revenue generated. Revised county estimates for 1990 are also included in Table E. Readers should not attempt to compare the estimates herein with those contained in earlier reports, as those are now obsolete.

Since additional data relating to travel and its economic impact in 1991 will become available subsequent to this study, the U.S. Travel Data Center reserves the right to revise these estimates in the future.

The recession in the U.S. economy which began in the third quarter of 1990 continued through the first quarter of 1991. Although the nation's Gross Domestic Product (GDP) began re-expanding in the second quarter of 1991, the economy remained flat throughout the rest of the year and the annual real GDP declined for the first time since 1982.

For the full-year 1991, the nation's GDP rose 2.8 percent, following a 5.2 percent growth in 1990. Growth in consumers' personal and disposable incomes slowed as prices rose, putting a squeeze on consumers spending ability, reflected in the reduced growth of personal outlays. Real disposable personal income fell 0.2 percent in 1991. The recessionary period also affected corporate America, as profits after taxes fell 3.7 percent in 1991, following moderate growth in 1990.

As indicated in Table A, growth in the broad measures of business activity slowed or declined in 1991.

Table A: Overall U.S. Economic Developments 1989 - 1991

Sector

Dollar gross domestic product Real gross domestic product

Personal income Disposable personal income Real disposable personal income Corporate profits after tax Personal outlays

Consumer price index Payroll employment

Source: U.S. Dept. of Commerce, U.S. Dept. of Labor

NATIONAL ECONOMIC & TRAVEL TRENDS IN 1991

Change from 1990 to 1991	Change from 1989 to 1990
2.8%	5.2%
-1.2	0.8
3.5	6.5
4.1	6.8
-0.2	1.5
-3.7	8.5
3.7	6.4
4.2	5.4
-1.0	1.5

Nonfarm payroll employment fell 1.0 percent in 1991, as the nation's unemployment level reached 6.7 percent of the civilian labor force.

Prices Affect Travel

Consumer prices rose 4.2 percent in 1991, following a 5.4 percent increase in 1990. Travel prices rose 6.5 percent in 1991, down slightly from the 8.3 percent increase in 1990.

Heavily influenced by the Gulf War crisis during the first months of 1991, prices of petroleum products leaped upward during the fall of 1990 and continued through the first quarter of 1991. Gasoline prices and airline fares were directly affected by the concern over the nation's oil supply.

Due to the economic downturn and the sharply rising cost of travel (especially transportation) the number of person-trips recorded by the Data Center's National Travel Survey fell 8.1 percent during the winter of 1990-91. Travel for all of 1991 increased a modest 2.5 percent over the previous year.

Table B: U.S. Travel Away From Home In 1991

Measure of U.S. Travel	Change from 1990 to 1991	Change from 1989 to 1990
Person-trips away from home*	2.5%	1.1%
Travel expenditures in the U.S.**	3.1	7.9
Travel price index	6.5	8.3
Travel generated payroll**	1.2	10.0
Travel generated employment**	-1.0	3.6

4

* one person on a trip 100 miles or more from home

** preliminary, including domestic and international travelers

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Travel related economic indicators declined sharply in 1991. The increase in travel expenditures by U.S. and international travelers was smaller than the growth which occurred in 1990. As indicated in Table B, the growth in travel spending was also less than the increase in the travel price index. This reduced the rate of increase in travel generated payroll income. In addition, travel-related businesses did not add to their job rolls as rapidly as expenditures increased, therefore payroll declined as a proportion of business receipts.

Travel generated employment actually declined 1.0 percent, the same rate of decline as all U.S. jobs for the year.

In summary, the nation's economy began a sharp downturn late in 1990, which continued into 1991. For the year, real GDP fell for the first time since 1982. The poor economic conditions combined with an overseas crisis during the first quarter of 1991 led to a sluggish year in the travel industry.

Direct Travel Expenditures

U.S. resident travelers in Iowa spent \$2.68 billion on transportation, lodging, food, entertainment, recreation and incidentals during 1991 while traveling away from home overnight, or on day trips to places 100 miles or more away from home. This represents an increase of 4.9 percent from the \$2.55 billion spent in Iowa during 1990, and a 33.0 percent increase over the level of spending achieved in 1987.

Table 3 shows the growth of travel expenditures in Iowa over the last five years.

Impact of Travel on Iowa Table 3: Travel Spending 1987 - 1991

Year	Expenditures (\$ Millions)	Change From Previous Year
1991	\$ 2,680.7	4.9%
1990	2,555.1	9.1
1989	2,341.1	8.6
1988	2,154.6	6.9
1987	2,015.9	2.1

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Travel in lowa during 1991 generated demand for many different goods and services, and produced receipts for a number of different industries. As indicated in Table 4, spending on auto transportation was the largest expenditure category, totaling more than \$1.0 billion, 38.2 percent of state total. Foodservice ranked second, garnering 21.8 percent of total direct travel expenditures in the state. Public Transportation received \$388.3 million with 14.5 percent of the state total.

1991 Impact of Travel on Iowa Table 4: Travel Spending

Expenditure Category

Public Transportation Auto Transportation Lodging Foodservice Entertainment & Recreation General Retail Trade

TOTAL

Table 5 shows travel spending in six categories for 1991 and 1990 as well as the change in these expenditure categories from 1990. All of the travel industries increased in 1991. Public transportation, reflecting an increase in travel activity in Iowa taxi airports and during 1991, experienced the largest increase. General Retail trade increased by 5.7 percent.

In addition to motels, campgrounds and hotels, lodging expenditures also include outlays for ownership of second homes, vacation homes and resort condominiums. Inclusive to these expenses are payments for mortgage interest, property taxes, maintenance and repair services.

Additionally lodging expenditures also take into account short-term rent and leasing arrangements for second homes, vacation homes and resort condominiums.

Expenditures	Percent of
(\$ Millions)	State Total
\$ 388.3	14.5%
1,023.9	38.2
287.6	10.7
584.8	21.8
164.3	6.1
231.8	8.6
\$ 2,680.7	100.0%

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1991 Impact of Travel on Iowa Table 5: Change in Travel Spending from Previous Year

Expenditure Category	1991 Expenditures (\$ Millions)	1990 Expenditures (\$ Millions)	Percent Change
Public Transportation	\$ 388.3	\$ 347.9	11.6%
Auto Transportation	1,023.9	993.4	3.1
Lodging	287.6	273.0	5.3
Foodservice	584.8	558.8	4.6
Entertainment & Recreation	164.3	162.7	1.0
General Retail Trade	231.8	219.4	5.7
TOTAL	\$ 2,680.7	\$ 2,555.1	4.9%

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1991 Impact of Travel on Iowa Table 6: Travel Generated Payroll

Industry Category

Public Transportation Auto Transportation Lodging Foodservice Entertainment & Recreation General Retail Trade Travel Planning

TOTAL

Travel Generated Payroll

Travelers in lowa purchased goods and services producing business receipts for retail and service establishments located throughout the state. These establishments use a proportion of their receipts to pay their employees. Overall, travel spending generated over \$427.5 million in wage and salary income during 1991. Travel generated payroll income grew 5.6 percent from \$404.8 million in 1990. On the average, every dollar of travel expenditures in lowa produced 16 cents in wage and salary income during 1991.

The breakdown of travel generated wage and salary income in lowa by industry category is shown in Table 6. Foodservice posted the largest payroll directly generated by travel with \$126.0 million, 29.5 percent the state total. Lodging followed foodservice with \$76.4 million in travel generated payroll, or 17.9 percent of the total for the state.

(\$	Payroll Millions)	Percent of State Total
\$	44.8 72.2 76.4 126.0 59.9 31.8 16.4	10.5% 16.9 17.9 29.5 14.0 7.4 3.8
\$	427.6	100.0%

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Travel Generated Employment

One of the most important benefits of travel and tourism is it's impact on employment. Travel creates jobs for individuals within communities by attracting money from outside the community. Due to the diversity of spending on travel and tourism, a wide variety of jobs at every skill level is created. U.S. travelers' expenditures generated 46.1 thousand jobs within the state in 1991. On the average, every \$58,150 spent by U.S. travelers in lowa directly supported one job during 1991.

As indicated in Table 7, food service, including restaurants and other eating and drinking places, provided more jobs than any other industry category, accounting for 18.3 thousand jobs, or 39.8 percent of the state total. This is attributable to the labor-intensiveness of the business and increase of the proportion of travel expenditures spent on food service. Lodging accounted for an additional 19.1 percent of jobs attributable to travel spending.

During 1991, travel and tourism supported 46.1 thousand jobs throughout the state, comprising about 3.7 percent of the total state non-agricultural employment of 1,236 thousand jobs. Travel generated employment increased 0.6 percent from 1990. This increase in travel generated employment during 1990 was associated with the increase in total state employment. Without the influx of travel expenditures supporting and creating jobs, lowa's unemployment rate of 4.6 percent would have been 3.0 percentage points higher.

1991 Impact of Travel on Iowa Table 7: Travel Generated Employment

Industry Category

Public Transportation Auto Transportation Lodging Foodservice Entertainment & Recreation General Retail Trade Travel Planning

TOTAL

Travel Generated Tax Revenue

Another important economic benefit of travel and tourism is the tax revenue which it generates for federal, state, and local governments. This money is used by governments to improve the overall quality of life enjoyed by Americans.

The U.S. government imposes taxes on gasoline, airline tickets, and personal and corporate income. It is estimated that direct U.S. travel spending in Iowa generated \$129.8 million for the federal government. As shown in Table 8, this amount comprised 1.7 percent of the total federal tax collections in Iowa during 1991. Each travel dollar produced 4.6 cents for federal tax coffers.

Employment	Percent of
(Thousands)	State Total
2.5	5.4%
5.7	12.4
8.8	19.1
18.3	39.8
6.9	15.0
2.8	6.1
1.0	2.2
46.1	100.0%

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1991 Impact of Travel on Iowa Table 8: Travel Generated Tax Receipts

Level of Government	Tax Receipts (\$ Millions)	Percent of Tax Receipts Collected
Federal Tax State Tax Local Tax	\$ 129.8 146.0 32.2	1.7% 4.2 1.6
OVERALL	\$ 308.0	2.3%

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U.S. travelers in Iowa generated another \$146.0 million in tax revenue for the state treasury through state sales, excise taxes, and taxes on personal and corporate income. This comprised 4.2 percent of all the state tax revenue for fiscal 1991. On the average, each travel dollar produced 5.4 cents in state tax receipts.

Local governments in lowa directly benefited from travel as well. During 1991, U.S. traveler spending generated \$32.2 million in sales and property tax revenue for county and municipal governments, 1.6 percent of the total local tax receipts in 1991.

Summary

Travel and tourism played a significant part in the lowa economy in 1991. Travel expenditures in lowa totaled almost \$2.7 billion during 1991, directly providing jobs for 46.1 thousand residents and wage and salary income of over \$427.5 million. Travel expenditures generated a combined sum of about \$308.0 million for federal, state and local governments, helping to finance public services enjoyed by all lowa residents.

Had travel and tourism suddenly ceased in 1991, the number of jobs in the state would have fallen 3.0 percent, and hundreds of businesses throughout the state would have been forced to close. For the state and local governments to maintain the same level of public services, the average tax bill would have had to rise around \$137 per household.

Moreover, the quality of life enjoyed in lowa would have declined dramatically. Travel contributes considerably to the economy, the life style and the culture that lowa residents and their visitors enjoy.

1991 TRAVEL IMPACT ON IOWA COUNTIES

U.S. traveler expenditures in Iowa during 1991 achieved nearly \$2.7 billion. Polk County, ranked first in travel expenditures attracting over \$621.4 million, 23.2 percent of the total amount for all of Iowa.

Linn and Scott Counties were second and third with \$295.9 million and \$162.6 million in U.S. traveler expenditures, respectively. Dickinson County ranked fourth with about \$135.0 million in 1991.

Expenditures on travel become business receipts for a number of different types of establishments. These establishments in turn use a portion of their receipts to pay their employees who serve the traveling public. In 1991, the wage and salary (payroll) income paid to employees directly serving the traveler was \$427.6 million.

Polk County led all counties with a travel generated payroll of approximately \$105.3 million. Linn County posted nearly \$47.5 million to rank second, followed by Scott County with over \$27.7 million.

U.S. travel expenditures in Iowa generated nearly 46.1 thousand jobs in 1991. Polk County ranked first with about 11.2 thousand jobs directly attributable to U.S. traveler spending, followed by Linn County with over 5 thousand jobs. Scott and Dickinson Counties ranked third and fourth, with travel generated employment of about 3.2 thousand and 2.8 thousand, respectively.

State tax revenue generated by travel expenditures through state sales and excise taxes and taxes imposed on corporate income totaled nearly \$146 million in Iowa during 1991. Polk County accounted for 19.8 percent of the state total with \$28.9 million, followed by Linn County with over \$13.6 million. Scott County and Dickinson County received \$10.1 million and \$8.3 million respectively in state tax revenue directly generated from U.S. traveler spending.

Travel expenditures also generate local tax revenue for the counties within lowa. The local government received about \$32.2 million tax revenue during 1991. The actual amount in a county depends on the local tax structure and the characteristics of travel spending within the county. Polk City ranked first receiving \$8.2 million, followed by Linn County with \$3.8 million. Scott County received \$2.0 million in local tax revenue generated by U.S. travel spending to rank third. The following detailed tables show tr for each of the 99 counties in Iowa.

The following detailed tables show travel expenditures and travel generated impact

TABLES

The following tables list the results of the County Economic Impact Component of the U.S. Travel Data Center's Travel Economic Impact Model for Iowa in 1991.

Table A shows the counties listed alphabetically, with 1991 travel expenditures and travel generated employment, payroll, state tax revenue and the local tax revenue for each.

Table B ranks the counties in order of 1991 travel expenditures from highest to lowest.

Table C indicates the percent of the state totals accounted for by each county in 1991.

Table D shows the percent change in 1991 over 1989 revised estimates for each of the measures of economic impact.

Table E shows the counties, listed alphabetically, with revised 1989 travel expenditures, travel generated payroll, employment, state tax revenue and local tax revenue shown for each.

1991 Impact of Travel on Iowa Table A: Alphabetical by County

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
ADAIR	\$ 3.72	\$ 0.47	0.05	\$ 0.27	\$ 0.03
ADAMS	1.05	0.13	0.01	0.07	0.01
ALLAMAKEE	12.80	1.61	0.15	0.90	0.35
APPANOOSE	6.29	0.92	0.10	0.42	0.09
AUDUBON	3.08	0.43	0.05	0.20	0.02
BENTON	6.22	0.62	0.06	0.49	0.03
BLACK HAWK	112.33	18.16	1.94	5.58	1.26
BOONE	7.78	1.01	0.10	0.55	0.06
BREMER	21.49	3.54	0.42	1.36	0.15
BUCHANAN	9.08	1.01	0.10	0.65	0.09
BUENA VISTA	9.53	1.39	0.14	0.60	0.08
BUTLER	3.62	0.33	0.03	0.30	0.02
CALHOUN	4.63	0.58	0.05	0.33	0.11
CARROLL	19.18	3.04	0.34	1.21	0.13
CASS	11.26	1.71	0.19	0.75	0.07
CEDAR	9.56	1.21	0.13	0.69	0.11
CERRO GORDO	63.68	9.48	1.01	3.61	0.90
CHEROKEE	6.96	1.02	0.11	0.46	0.05
CHICKASAW	3.46	0.43	0.04	0.25	0.03
CLARKE	8.19	1.19	0.13	0.56	0.06
CLAY	51.75	6.50	0.53	1.31	0.30
CLAYTON	11.38	1.55	0.16	0.79	0.25
CLINTON	35.06	5.86	0.66	2.11	0.41
CRAWFORD	7.86	1.11	0.12	0.50	0.05
DALLAS	21.23	3.88	0.46	1.31	0.16
DAVIS	2.04	0.20	0.02	0.15	0.02
DECATUR	3.73	0.50	0.05	0.26	0.04

1991 Impact of Travel on Iowa Table A: Alphabetical by County (Continued)

				State Tax	Local Tax
	Expenditures	Payroll	Employment	Receipts	Receipts
County	(\$ Millions)	(\$ Millions)	(Thousands)	(\$ Millions)	(\$ Millions)
			·		
DELAWARE	\$ 2.53	\$ 0.32	0.03	\$ 0.18	\$ 0.03
DES MOINES	42.00	6.13	0.58	1.78	0.42
DICKINSON	134.96	23.43	2.75	8.25	1.98
DUBUQUE	119.22	21.98	2.56	6.49	1.61
EMMET	5.54	0.67	0.06	0.34	0.05
FAYETTE	5.73	0.68	0.07	0.39	0.04
FLOYD	7.05	0.90	0.08	0.39	0.04
FRANKLIN	4.14	0.44	0.04	0.31	0.02
FREMONT	7.61	1.22	0.14	0.44	0.06
GREENE	2.13	0.29	0.03	0.15	0.02
GRUNDY	2.15	0.22	0.02	0.16	0.01
GUTHRIE	6.95	0.93	0.09	0.50	0.12
HAMILTON	8.41	1.17	0.12	0.55	0.06
HANCOCK	2.58	0.30	0.03	0.15	0.03
HARDIN	5.65	0.68	0.06	0.38	0.04
HARRISON	7.69	0.99	0.10	0.56	0.05
HENRY	7.73	1.17	0.13	0.50	0.10
HOWARD	1.45	0.19	0.02	0.10	0.01
HUMBOLDT	3.86	0.51	0.05	0.18	0.03
IDA	2.13	0.23	0.02	0.16	0.02
IOWA	21.23	3.44	0.40	1.36	0.26
JACKSON	12.49	1.65	0.16	0.83	0.23
JASPER	26.98	4.16	0.46	1.64	0.33
JEFFERSON	11.49	1.96	0.22	0.67	0.08
JOHNSON	90.54	16.05	1.83	5.11	1.20
JUNES	11.59	1.77	0.20	0.76	0.08
REOKUK	1.75	0.18	0.02	0.13	0.02

1991 Impact of Travel on Iowa Table A: Alphabetical by County (Continued)

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
KOSSUTH	\$ 4.76	\$ 0.60	0.06	\$ 0.34	\$ 0.03
LEE	31.00	5.03	0.57	1.80	0.39
LINN	295.91	47.44	5.04	13.65	3.80
LOUISA	6.44	0.74	0.07	0.48	0.13
LUCAS	2.24	0.31	0.03	0.16	0.03
LYON	1.87	0.21	0.02	0.14	0.01
MADISON	4.27	0.46	0.04	0.31	0.04
MAHASKA	10.32	1.51	0.16	0.64	0.10
MARION	11.97	1.78	0.18	0.81	0.09
MARSHALL	32.53	5.19	0.57	1.85	0.37
MILLS	3.01	0.29	0.03	0.23	0.02
MITCHELL	2.87	0.35	0.04	0.20	0.03
MONONA	7.37	1.33	0.14	0.42	0.07
MONROE	4.55	0.74	0.09	0.28	0.04
MONTGOMERY	8.77	1.39	0.16	0.57	0.07
MUSCATINE	30.81	4.98	0.56	1.83	0.28
O'BRIEN	5.75	0.61	0.05	0.42	0.03
OSCEOLA	1.06	0.12	0.01	0.08	0.01
PAGE	5.43	0.68	0.07	0.39	0.05
PALO ALTO	4.39	0.55	0.05	0.31	0.09
PLYMOUTH	8.00	1.07	0.11	0.56	0.05
POCAHONTAS	2.24	0.29	0.03	0.14	0.02
POLK	621.42	105.29	11.15	28.90	8 20
POTTAWATTAMIE	68.67	10.94	1.24	4.43	0.77
POWESHIEK	18.18	2.49	0.25	1 91	0.24
RINGGOLD	2.99	0.33	0.03	0.23	0.04
SAC	5.88	0.68	0.06	0.42	0.08

1991 Impact of Travel on Iowa Table A: Alphabetical by County (Continued)

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
SCOTT	\$ 162.63	\$ 27.75	3.17	\$ 10.11	\$ 2.04
SHELBY	4.50	0.56	0.05	0.33	0.04
SIOUX	9.18	1.38	0.14	0.64	0.06
STORY	64.37	10.24	1.15	3.64	0.75
TAMA	5.44	0.79	0.08	0.38	0.05
TAYLOR	1.62	0.16	0.01	0.13	0.01
UNION	6.72	0.98	0.11	0.45	0.06
VAN BUREN	2.51	0.36	0.04	0.17	0.03
WAPELLO	28.71	4.33	0.48	1.77	0.35
WARREN	9.93	1.19	0.12	0.73	0.08
WASHINGTON	5.22	0.72	0.08	0.35	0.04
WAYNE	3.65	0.44	0.05	0.26	0.04
WEBSTER	29.13	4.49	0.47	1.64	0.19
WINNEBAGO	4.03	0.47	0.04	0.30	0.03
WINNESHIEK	8.99	1.40	0.16	0.59	0.07
WOODBURY	111.03	16.48	1.65	4.97	1.17
WORTH	1.73	0.16	0.01	0.14	0.01
WRIGHT	6.12	0.70	0.06	0.41	0.09
STATE TOTALS	\$ 2,680.75	\$ 427.56	46.08	\$ 146.01	\$ 32.20

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1991 Impact of Travel on Iowa Table B: Ranking of Counties by Expenditure Levels

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
POLK	\$ 621.42	\$ 105.29	11.15	\$ 28.90	\$ 8.20
LINN	295.91	47.44	5.04	13.65	3.80
SCOTT	162.63	27.75	3.17	10.11	2.04
DICKINSON	134.96	23.43	2.75	8.25	1.98
DUBUQUE	119.22	21.98	2.56	6.49	1.61
BLACK HAWK	112.33	18.16	1.94	5.58	1.26
WOODBURY	111.03	16.48	1.65	4.97	1.17
JOHNSON	90.54	16.05	1.83	5.11	1.20
POTTAWATTAMIE	68.67	10.94	1.24	4.43	0.77
STORY	64.37	10.24	1.15	3.64	0.75
CERRO GORDO	63.68	9.48	1.01	3.61	0.90
CLAY	51.75	6.50	0.53	1.31	0.30
DES MOINES	42.00	6.13	0.58	1.78	0.42
CLINTON	35.06	5.86	0.66	2.11	0.41
MARSHALL	32.53	5.19	0.57	1.85	0.37
LEE	31.00	5.03	0.57	1.80	0.39
MUSCATINE	30.81	4.98	0.56	1.83	0.28
WEBSTER	29.13	4.49	0.47	1.64	0.19
WAPELLO	28.71	4.33	0.48	1.77	0.35
JASPER	26.98	4.16	0.46	1.64	0.33
BREMER	21.49	3.54	0.42	1.36	0.15
IOWA	21.23	3.44	0.40	1.36	0.26
DALLAS	21.23	3.88	0.46	1.31	0.16
CARROLL	19.18	3.04	0.34	1.21	0.13
POWESHIEK	18.18	2.49	0.25	1.21	0.34
ALLAMAKEE	12.80	1.61	0.15	0.90	0.35
JACKSON	12.49	1.65	0.16	0.83	0.23

1991 Impact of Travel on Iowa Table B: Ranking of Counties by Expenditure Levels (Continued)

				State Tax	Local Tax
	Expenditures	Payroll	Employment	Receipts	Receipts
County	(\$ Millions)	(\$ Millions)	(Thousands)	(\$ Millions)	(\$ Millions)
MARION	\$ 11.97	\$ 1.78	0.18	\$ 0.81	\$ 0.09
JONES	11.59	1.77	0.20	0.76	0.08
JEFFERSON	11.49	1.96	0.22	0.67	0.08
CLAYTON	11.38	1.55	0.16	0.79	0.25
CASS	11.26	1.71	0.19	0.75	0.07
MAHASKA	10.32	1.51	0.16	0.64	0.10
WARREN	9.93	1.19	0.12	0.73	0.08
CEDAR	9.56	1.21	0.13	0.69	0.11
BUENA VISTA	9.53	1.39	0.14	0.60	0.08
SIOUX	9.18	1.38	0.14	0.64	0.06
BUCHANAN	9.08	1.01	0.10	0.65	0.09
WINNESHIEK	8.99	1.40	0.16	0.59	0.07
MONTGOMERY	8.77	1.39	0.16	0.57	0.07
HAMILTON	8.41	1.17	0.12	0.55	0.06
CLARKE	8.19	1.19	0.13	0.56	0.06
PLYMOUTH	8.00	1.07	0.11	0.56	0.05
CRAWFORD	7.86	1.11	0.12	0.50	0.05
BOONE	7.78	1.01	0.10	0.55	0.06
HENRY	7.73	1.17	0.13	0.50	0.10
HARRISON	7.69	0.99	0.10	0.56	0.05
FREMONT	7.61	1.22	0.14	0.44	0.06
MONONA	7.37	1.33	0.14	0.42	0.07
FLOYD	7.05	0.90	0.08	0.39	0.04
CHEROKEE	6.96	1.02	0.11	0.46	0.05
GUTHRIE	6.95	0.93	0.09	0.50	0.12
UNION	6.72	0.98	0.11	0.45	0.06
LOUISA	6.44	0.74	0.07	0.48	0.13

1991 Impact of Travel on Iowa Table B: Ranking of Counties by Expenditure Levels (Continued)

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
APPANOOSE	\$ 6.29	\$ 0.92	0.10	\$ 0.42	\$ 0.09
BENTON	6.22	0.62	0.06	0.49	0.03
WRIGHT	6.12	0.70	0.06	0.41	0.09
SAC	5.88	0.68	0.06	0.42	0.12
O'BRIEN	5.75	0.61	0.05	0.42	0.03
FAYETTE	5.73	0.68	0.07	0.39	0.04
HARDIN	5.65	0.68	0.06	0.38	0.04
EMMET	5.54	0.67	0.06	0.34	0.05
ТАМА	5.44	0.79	0.08	0.38	0.05
PAGE	5.43	0.68	0.07	0.39	0.05
WASHINGTON	5.22	0.72	0.08	0.35	0.04
KOSSUTH	4.76	0.60	0.06	0.34	0.03
CALHOUN	4.63	0.58	0.05	0.33	0.11
MONROE	4.55	0.74	0.09	0.28	0.04
SHELBY	4.50	0.56	0.05	0.33	0.04
PALO ALTO	4.39	0.55	0.05	0.31	0.09
MADISON	4.27	0.46	0.04	0.31	0.04
FRANKLIN	4.14	0.44	0.04	0.31	0.02
WINNEBAGO	4.03	0.47	0.04	0.30	0.03
HUMBOLDT	3.86	0.51	0.05	0.18	0.03
DECATUR	3.73	0.50	0.05	0.26	0.04
ADAIR	3.72	0.47	0.05	0.27	0.03
WAYNE	3.65	0.44	0.05	0.26	0.04
BUTLER	3.62	0.33	0.03	0.30	0.02
CHICKASAW	3.46	0.43	0.04	0.25	0.03
AUDUBON	3.08	0.43	0.05	0.20	0.02
MILLS	3.01	0.29	0.03	0.23	0.02

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1991 Impact of Travel on Iowa Table B: Ranking of Counties by Expenditure Levels (Continued)

County	Expend (\$ Mil	itures lions)	(\$	Payroll Millions)	Employm (Thousan	ient ids) (State Rec (\$ Mil	e Tax ceipts lions)	Lo F (\$ I	ocal Tax Receipts Millions)
RINGGOLD	\$	2.99	\$	0.33	0.	03	\$ (0.23	\$	0.06
MITCHELL	:	2.87		0.35	0.	04	(0.20		0.03
HANCOCK	:	2.58		0.30	0.0	03	(0.15		0.03
DELAWARE	:	2.53		0.32	0.0	03	(0.18		0.03
VAN BUREN	-	2.51		0.36	0.0	04	(0.17		0.03
LUCAS	2	2.24		0.31	0.0	03	(0.16		0.03
POCAHONTAS	2	2.24		0.29	0.0	03	(0.14		0.02
GRUNDY	2	2.15		0.22	0.0)2	(0.16		0.01
GREENE	2	2.13		0.29	0.0	03	(0.15		0.02
IDA	2	2.13		0.23	0.0)2	(0.16		0.02
DAVIS	2	2.04		0.20	0.0)2	(0.15		0.02
LYON	1	.87		0.21	0.0)2	C	0.14		0.01
KEOKUK	1	.75		0.18	0.0)2	C).13		0.02
WORTH	NC 6 1	.73		0.16	0.0)1	C).14		0.01
TAYLOR	1	.62		0.16	0.0)1	C).13		0.01
HOWARD	1	.45		0.19	0.0	2	C).10		0.01
OSCEOLA	1	.06		0.12	0.0)1	C	.08		0.01
ADAMS	1	.05		0.13	0.0)1	C).07		0.01
STATE TOTALS	\$ 2,680	.75	\$ 4	427.56	46.0	8\$	146	6.01	\$	32.20

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1991 Impact of Travel on Iowa Table C: Percent Distribution by County

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ADAIR	0.14%	0.11%	0.11%	0.18%	0.09%
ADAMS	0.04	0.03	0.03	0.05	0.04
ALLAMAKEE	0.48	0.38	0.33	0.62	1.10
APPANOOSE	0.23	0.22	0.21	0.29	0.27
AUDUBON	0.11	0.10	0.10	0.14	0.08
BENTON	0.23	0.15	0.12	0.34	0.10
BLACK HAWK	4.19	4.25	4.21	3.82	3.90
BOONE	0.29	0.24	0.21	0.37	0.19
BREMER	0.80	0.83	0.90	0.93	0.46
BUCHANAN	0.34	0.24	0.21	0.45	0.29
BUENA VISTA	0.36	0.32	0.31	0.41	0.24
BUTLER	0.13	0.08	0.06	0.20	0.06
CALHOUN	0.17	0.13	0.12	0.23	0.34
CARROLL	0.72	0.71	0.74	0.83	0.41
CASS	0.42	0.40	0.42	0.52	0.23
CEDAR	0.36	0.28	0.27	0.47	0.34
CERRO GORDO	2.38	2.22	2.20	2.47	2.79
CHEROKEE	0.26	0.24	0.24	0.32	0.14
CHICKASAW	0.13	0.10	0.09	0.17	0.09
CLARKE	0.31	0.28	0.29	0.38	0.20
CLAY	1.93	1.52	1.15	0.89	0.94
CLAYTON	0.42	0.36	0.34	0.54	0.77
CLINTON	1.31	1.37	1.42	1 45	1.26
CRAWFORD	0.29	0.26	0.25	0.34	0.16
DALLAS	0.79	0.91	0 99 0	0.00	0.50
DAVIS	0.08	0.05	0.04	0.11	0.00
DECATUR	0.14	0.12	0.12	0.19	0.08
		0.12	0.12	0.10	0.13

1991 Impact of Travel on Iowa Table C: Percent Distribution by County (Continued)

				State Tax	Local Tax	
County	Expenditures	Payroll	Employment	Receipts	Receipts	
DELAWARE	0.09%	0.07%	0.07%	0.12%	0.08%	
DES MOINES	1.57	1.43	1.26	1.22	1.30	
DICKINSON	5.03	5.48	5.97	5.65	6.15	
DUBUQUE	4.45	5.14	5.55	4.44	4.99	
EMMET	0.21	0.16	0.13	0.23	0.16	
FAYETTE	0.21	0.16	0.14	0.27	0.13	
FLOYD	0.26	0.21	0.18	0.27	0.14	
FRANKLIN	0.15	0.10	0.09	0.21	0.07	
FREMONT	0.28	0.29	0.31	0.30	0.18	
GREENE	0.08	0.07	0.06	0.10	0.08	
GRUNDY	0.08	0.05	0.04	0.11	0.05	
GUTHRIE	0.26	0.22	0.20	0.34	0.37	
HAMILTON	0.31	0.27	0.27	0.38	0.18	
HANCOCK	0.10	0.07	0.06	0.10	0.10	
HARDIN	0.21	0.16	0.14	0.26	0.13	
HARRISON	0.29	0.23	0.23	0.38	0.14	
HENRY	0.29	0.27	0.28	0.34	0.30	1. 1. 1.
HOWARD	0.05	0.04	0.04	0.07	0.04	
HUMBOLDT	0.14	0.12	0.11	0.13	0.10	
IDA	0.08	0.05	0.04	0.11	0.06	
IOWA	0.79	0.80	0.88	0.93	0.81	
JACKSON	0.47	0.39	0.36	0.57	0.72	
JASPER	1.01	0.97	0.99	1.12	1.03	
JEFFERSON	0.43	0.46	0.47	0.46	0.26	
JOHNSON	3.38	3.75	3.98	3.50	3.74	
JONES	0.43	0.41	0.44	0.52	0.26	
KEOKUK	0.07	0.04	0.03	0.09	0.07	

1991 Impact of Travel on Iowa Table C: Percent Distribution by County (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
KOSSUTH	0.18%	0.14%	0.13%	0.23%	0.10%
LEE LINN	1.16 11.04	1.18 11.09	1.24 10.93	1.23 9.35	1.22 11.79
LOUISA	0.24	0.17	0.15	0.33	0.42
LUCAS	0.08	0.07	0.07	0.11	0.09
LYON	0.07	0.05	0.04	0.10	0.05
MADISON	0.16	0.11	0.09	0.21	0.12
MAHASKA	0.38	0.35	0.35	0.44	0.30
MARION	0.45	0.42	0.40	0.56	0.29
MARSHALL	1.21	1.21	1.25	1.27	1.16
MILLS	0.11	0.07	0.06	0.16	0.06
MITCHELL	0.11	0.08	0.08	0.14	0.08
MONONA	0.28	0.31	0.31	0.28	0.23
MONROE	0.17	0.17	0.19	0.19	0.13
MONTGOMERY	0.33	0.33	0.34	0.39	0.20
MUSCATINE	1.15	1.16	1.22	1.25	0.87
O'BRIEN	0.21	0.14	0.12	0.29	0.10
OSCEOLA	0.04	0.03	0.02	0.05	0.02
PAGE	0.20	0.16	0.15	0.27	0.14
PALO ALTO	0.16	0.13	0.11	0.21	0.28
PLYMOUTH	0.30	0.25	0.24	0.38	0.15
POCAHONTAS	0.08	0.07	0.06	0.09	0.07
POLK	23.18	24.63	24.19	19.80	25.47
POTTAWATTAMIE	2.56	2.56	2.68	3.03	2.40
POWESHIEK	0.68	0.58	0.53	0.83	1.05
RINGGOLD	0.11	0.08	0.06	0.15	0.18
SAC	0.22	0.16	0.13	0.29	0.36

1991 Impact of Travel on Iowa Table C: Percent Distribution by County (Continued)

				State Tax	Local Tax
County	Expenditures	Payroll	Employment	Receipts	Receipts
SCOTT	6.07%	6.49%	6.89%	6.92%	6.32%
SHELBY	0.17	0.13	0.12	0.23	0.11
SIOUX	0.34	0.32	0.30	0.44	0.19
STORY	2.40	2.40	2.50	2.50	2.32
TAMA	0.20	0.18	0.18	0.26	0.16
TAYLOR	0.06	0.04	0.03	0.09	0.04
UNION	0.25	0.23	0.23	0.31	0.19
VAN BUREN	0.09	0.08	0.09	0.12	0.09
WAPELLO	1.07	1.01	1.04	1.21	1.08
WARREN	0.37	0.28	0.26	0.50	0.25
WASHINGTON	0.19	0.17	0.16	0.24	0.11
WAYNE	0.14	0.10	0.10	0.18	0.13
WEBSTER	1.09	1.05	1.02	1.12	0.59
WINNEBAGO	0.15	0.11	0.10	0.21	0.09
WINNESHIEK	0.34	0.33	0.34	0.41	0.22
WOODBURY	4.14	3.86	3.57	3.41	3.62
WORTH	0.06	0.04	0.03	0.09	0.05
WRIGHT	0.23	0.16	0.14	0.28	0.29
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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1991 Impact of Travel on Iowa Table D: Percent Change Over Revised 1989

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ADAIR	-10.0%	-18.1%	-29.5%	-9.5%	-14.0%
ADAMS	21.1	17.9	0.9	18.6	7.0
ALLAMAKEE	8.6	10.7	-0.2	10.3	3.7
APPANOOSE	47.9	67.5	64.7	43.3	20.8
AUDUBON	106.5	172.1	188.3	74.5	72.5
BENTON	9.9	3.2	-8.1	3.9	-0.3
BLACK HAWK	27.0	26.6	14.9	25.1	46.9
BOONE	-0.9	6.3	1.4	18.0	2.0
BREMER	23.3	26.8	16.4	21.0	19.0
BUCHANAN	33.0	47.3	43.7	18.0	16.0
BUENA VISTA	30.2	34.1	24.3	24.6	18.9
BUTLER	11.1	8.4	-2.3	3.0	3.3
CALHOUN	14.7	19.2	8.9	12.1	5.3
CARROLL	21.9	26.8	17.6	20.8	18.5
CASS	17.5	20.6	10.5	14.0	13.5
CEDAR	4.9	5.4	-4.3	5.0	2.1
CERRO GORDO	16.5	18.8	8.1	14.9	24.2
CHEROKEE	7.6	12.8	5.3	16.3	6.7
CHICKASAW	-4.8	-13.1	-25.8	-4.0	-10.0
CLARKE	50.2	74.3	70.2	37.7	42.4
CLAY	53.1	46.6	25.7	32.8	31.5
CLAYTON	11.0	13.6	2.7	9.6	45
CLINTON	15.4	19.4	5.7	89	26.8
CRAWFORD	39.5	54.4	51.6	34.4	37.5
DALLAS	-10.7	-10.1	-19.9	-10.3	-12.2
DAVIS	28	-34	-17.0	0.0	.0.4
DECATUR	26.6	35.5	27.5	20.2	-0.4
	2010	00.0	21.0	20.2	13.9

1991 Impact of Travel on Iowa Table D: Percent Change Over Revised 1989 (Continued)

				State Tax	Local Tax
County	Expenditures	Payroll	Employment	Receipts	Receipts
DELAWARE	8.3%	12.0%	0.9%	7.9%	4.8%
DES MOINES	-1.8	-2.8	-16.9	-5.1	2.1
DICKINSON	35.4	41.5	29.9	33.5	15.6
DUBUQUE	23.5	32.0	21.8	29.9	54.1
EMMET	39.3	38.7	23.3	19.0	15.9
FAYETTE	4.5	-2.5	-15.0	5.4	-3.3
FLOYD	6.6	12.4	5.1	11.6	6.2
FRANKLIN	19.8	21.9	10.4	6.4	12.4
FREMONT	33.4	37.4	25.9	33.2	24.0
GREENE	7.9	4.2	-9.0	10.5	1.5
GRUNDY	19.9	23.8	13.9	11.4	11.4
GUTHRIE	40.4	74.0	76.1	26.2	16.5
HAMILTON	-12.2	-7.9	-12.6	1.2	-9.0
HANCOCK	25.1	36.4	30.3	25.4	11.8
HARDIN	13.8	16.0	4.0	10.0	7.8
HARRISON	29.6	42.6	38.0	18.5	29.3
HENRY	47.0	56.5	48.0	40.7	63.0
HOWARD	26.9	39.9	32.3	28.6	17.0
HUMBOLDT	76.0	64.1	37.9	33.9	30.7
DA	15.3	16.7	6.3	9.6	71
AWO	6.3	6.9	-3.3	3.8	25.5
JACKSON	18.7	21.4	10.7	14.5	11.6
JASPER	7.6	9.4	-0.3	89	22.8
JEFFERSON	5.6	9.4	-0.5	9.2	4.1
JOHNSON	14.1	16.9	6.8	17.6	39.0
JONES	22.8	26.0	15.7	19.1	16.3
KEOKUK	20.4	20.2	7.8	11.0	6.5

1991 Impact of Travel on Iowa Table D: Percent Change Over Revised 1989 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
KOSSUTH	21.4%	27.0%	19.4%	18.8%	15.6%
LEE	20.2	25.0	14.7	22.7	43.8
LINN	16.0	16.9	5.2	14.7	56.6
LOUISA	12.5	14.4	4.0	8.2	4.5
LUCAS	-70.6	-65.6	-65.0	0.3	-44.7
LYON	-0.4	2.2	-8.4	-0.0	0.0
MADISON	26.2	31.7	23.1	14.5	12.6
MAHASKA	27.5	33.3	24.1	26.4	16.1
MARION	22.9	35.8	30.6	23.3	20.8
MARSHALL	33.2	36.6	25.2	28.8	58.8
MILLS	11.5	3.8	-9.3	6.0	0.9
MITCHELL	29.8	40.4	34.4	22.4	17.1
MONONA	94.0	164.7	145.5	52.6	74.0
MONROE	20.2	24.3	13.8	19.7	13.0
MONTGOMERY	17.3	20.3	10.1	16.4	12.2
MUSCATINE	36.9	40.6	29.4	33.2	22.3
O'BRIEN	13.5	16.2	7.7	8.5	8.5
OSCEOLA	21.8	29.2	19.0	11.7	14.1
PAGE	20.6	32.8	31.4	19.8	15.1
PALO ALTO	15.2	18.7	8.3	12.9	5.5
PLYMOUTH	30.6	38.6	33.3	25.7	26.4
POCAHONTAS	77.8	84.6	66.2	54.8	28.0
POLK	6.1	5.8	-6.1	4.1	17.6
POTTAWATTAM	20.8	21.1	9.8	15.0	40.4
POWESHIEK	18.8	22.8	12.1	14.0	6.9
RINGGOLD	12.7	14.7	4.4	8.1	4.6
SAC	4.4	8.9	2.6	9.2	3.5

1991 Impact of Travel on Iowa Table D: Percent Change Over Revised 1989 (Continued)

County		Payroll	Employment	State Tax Receipts	Local Tax Receipts
SCOTT	15.5%	14.7%	4.0%	13.5%	37.0%
SHELBY	19.6	20.1	12.0	14.0	18.6
SIOUX	51.4	67.7	72.5	41.3	49.0
STORY	24.1	23.0	10.2	17.4	43.1
TAMA	26.4	30.4	19.7	16.8	14.3
TAYLOR	12.7	11.6	1.0	7.1	4.7
UNION	7.4	11.7	3.6	16.9	5.2
VAN BUREN	-2.7	-7.9	-18.8	-2.0	-4.5
WAPELLO	16.6	15.9	3.2	11.4	28.3
WARREN	20.2	25.6	16.7	14.1	24.9
WASHINGTON	22.8	27.9	17.9	22.0	16.9
WAYNE	42.4	64.9	65.8	27.8	19.9
WEBSTER	10.4	10.2	-0.9	9.1	4.8
WINNEBAGO	28.5	45.0	46.4	18.0	23.3
WINNESHIEK	-15.7	• -21.1	-31.0	-13.9	-19.9
WOODBURY	-3.0	3.9	-2.8	7.5	33.7
WORTH	6.2	7.8	1.6	5.8	31
WRIGHT	14.1	14.0	1.7	10.8	4.9
STATE TOTAL	14.8%	16.5%	5.5%	14.0%	26.7%

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Impact of Travel on Iowa Table E: Alphabetical by County Revised 1989

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
ADAIR	\$ 4.13	\$ 0.57	0.07	\$ 0.30	\$ 0.03
ADAMS	0.86	0.11	0.01	0.06	0.01
ALLAMAKEE	11.78	1.46	0.15	0.82	0.34
APPANOOSE	4.25	0.55	0.06	0.29	0.07
AUDUBON	1.49	0.16	0.02	0.12	0.01
BENTON	5.65	0.60	0.06	0.47	0.03
BLACK HAWK	88.38	14.34	1.69	4.46	0.86
BOONE	7.85	0.95	0.09	0.46	0.06
BREMER	17.43	2.79	0.36	1.13	0.12
BUCHANAN	6.83	0.69	0.07	0.55	0.08
BUENA VISTA	7.31	1.03	0.12	0.48	0.07
BUTLER	3.25	0.30	0.03	0.29	0.02
CALHOUN	4.03	0.48	0.05	0.30	0.10
CARROLL	15.74	2.40	0.29	1.00	0.11
CASS	9.58	1.42	0.18	0.66	0.06
CEDAR	9.11	1.15	0.13	0.65	0.11
CERRO GORDO	54.61	7.98	0.94	3.14	0.72
CHEROKEE	6.47	0.91	0.10	0.40	0.04
CHICKASAW	3.64	0.49	0.06	0.26	0.03
CLARKE	5.45	0.68	0.08	0.41	0.04
CLAY	33.80	4.43	0.42	0.98	0.23
CLAYTON	10.25	1.36	0.15	0.72	0.24
CLINTON	30.36	4.91	0.62	1.94	0.32
CRAWFORD	5.63	0.72	0.08	0.37	0.04
DALLAS	23.79	4.32	0.57	1.47	0.19
DAVIS	1.99	0.21	0.02	0.15	0.02
DECATUR	2.94	0.37	0.04	0.22	0.04

1989 Impact of Travel on Iowa Table E: Alphabetical by County (Continued)

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
	\$ 234	\$ 0.28	0.03	\$ 0.17	\$ 0.03
DES MOINES	42 70	6.31	0.70	1.88	0.41
DICKINSON	99.63	16 55	2 12	6 18	1.71
DIORINGON	55.00	10.00		0.10	
DUBUQUE	96.48	16.65	2.10	5.00	1.04
EMMET	3.98	0.48	0.05	0.28	0.04
FAYETTE	5.48	0.70	0.08	0.37	0.04
FLOYD	6.61	0.80	0.08	0.35	0.04
FRANKLIN	3.45	0.36	0.00	0.35	0.04
FREMONT	5 70	0.80	0.11	0.23	0.02
	0.70	0.00	0.11	0.00	0.00
GREENE	1.98	0.28	0.03	0.14	0.02
GRUNDY	1.80	0.18	0.02	0.15	0.01
GUTHRIE	4.95	0.53	0.05	0.40	0.10
HAMILTON	9.58	1.27	0 14	0.55	0.06
HANCOCK	2.06	0.22	0.02	0.12	0.03
HARDIN	4.96	0.59	0.06	0.34	0.04
HARRISON	5.94	0.69	0.08	0.47	0.03
HENRY	5.26	0.75	0.09	0.35	0.06
HOWARD	1.14	0.14	0.01	0.08	0.01
HUMBOLDT	2.19	0.31	0.04	0.14	0.02
IDA	1.84	0.20	0.02	0.15	0.02
AWOI	19.97	3.22	0.42	1.31	0.21
IACKSON	10.50	1.00	0.45	0.70	
	10.52	1.30	0.15	0.73	0.21
IFFEERSON	25.07	3.01	0.46	1.50	0.27
	10.07	1./9	0.22	0.61	0.08
JOHNSON	79.29	13.72	1.72	4.35	0.87
JONES	9.44	1.40	0.18	0.64	0.07
KEOKUK	1.46	0.15	0.01	0.11	0.02

1989 Impact of Travel on Iowa Table E: Alphabetical by County (Continued)

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
KOSSUTH	\$ 3.92	\$ 0.47	0.05	\$ 0.28	\$ 0.03
LEE LINN	25.79 255.00	4.02 40.57	0.50 4.79	1.47 11.89	0.27
LOUISA	5.73	0.65	0.07	0.44	0.13
LUCAS LYON	7.65 1.88	0.90 0.20	0.09 0.02	0.16 0.14	0.05 0.01
MADISON	3.38	0.35	0.03	0.27	0.03
MAHASKA MARION	8.09 9.73	1.13 1.31	0.13 0.14	0.51 0.66	0.08 0.08
MARSHALL	24.41	3.80	0.46	1.44	0.24
MILLS MITCHELL	2.70 2.21	0.28 0.25	0.03 0.03	0.22 0.17	0.02
MONONA	3.80	0.50	0.06	0.27	0.04
MONROE	3.78 7.47	0.59 1.16	0.08 0.14	0.24 0.49	0.04 0.06
MUSCATINE	22.50	3.54	0.43	1.37	0.23
OSCEOLA	5.07 0.87	0.52	0.05 0.01	0.39 0.07	0.03 0.01
PAGE	4.50	0.51	0.05	0.33	0.04
PALO ALTO PLYMOUTH	3.81 6.12	0.46 0.77	0.05 0.08	0.28 0.44	0.08 0.04
POCAHONTAS	1.26	0.16	0.02	0.09	0.02
POLK	585.25 56.81	99.51 9.03	11.87 1.12	27.77 3.85	6.97 0.55
POWESHIEK	15.30	2.02	0.22	1.06	0.31
RINGGOLD SAC	2.65 5.63	0.28 0.62	0.03 0.06	0.21 0.39	0.06 0.11

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1989 Impact of Travel on Iowa Table E: Alphabetical by County (Continued)

County	Expenditures (\$ Millions)		(\$	Payroll Millions)	Employment (Thousands)		State Tax Receipts (\$ Millions)		L (\$	Local Tax Receipts (\$ Millions)	
SCOTT	\$ 1.	40.80	\$	24.19		3.05	\$	8.91	\$	1.49	
SHELBY		3.76		0.46		0.05		0.29		0.03	
SIOUX		6.06		0.82		0.08		0.45		0.04	
STORY		51.84		8.32		1.04		3.10		0.52	
TAMA		4.30		0.60	(0.07		0.33		0.05	
TAYLOR		1.44		0.14	(0.01		0.12		0.01	
UNION		6.25		0.88	(0.10		0.39		0.06	
VAN BUREN		2.58		0.39	(0.05		0.17		0.03	
WAPELLO	2	24.62		3.73	(0.46		1.59		0.27	
WARREN		8.26		0.95	(0.10		0.64		0.06	
WASHINGTON		4.25		0.56	(0.06		0.29		0.03	
WAYNE		2.56		0.27	C	0.03		0.21		0.03	
WEBSTER	2	26.39		4.08	C).47		1.50		0.18	
WINNEBAGO		3.13		0.33	C	.03		0.26		0.02	
WINNESHIEK	1	0.67		1.77	C	.22		0.69		0.09	
WOODBURY	11	4.58		15.86	1	.69		4.63		0.87	
WORTH		1.63		0.15	0	.01		0.13		0.01	
WRIGHT		5.36		0.62	0	.06		0.37		0.09	
STATE TOTALS	\$ 2,33	5.17	\$	366.85	43	.67	\$ 1	28.02	\$	25.41	

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APPENDIX A: TRAVEL ECONOMIC IMPACT MODEL

TRAVEL ECONOMIC IMPACT MODEL

Introduction

The Travel Economic Impact Model (TEIM) was developed by the U.S. Travel Data Center to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model built upon estimates of 14 travel expenditure categories, their impact on 14 types of travel-related businesses at the retail level, and the resulting business receipts, employment, personal income, and tax receipts.

The TEIM has the capability of estimating the economic impact of various types of travel, such as business and vacation, by transport mode and type of accommodations used, and other trip and traveler characteristics.

The revised TEIM has been used to develop estimates of 1987 and subsequent year travel expenditures and the effect of these expenditures on employment, payroll and tax revenue in each of the 50 states and the District of Columbia. The Data Center is also planning to publish a time series of estimates for the years 1977-87 produced by the revised TEIM. The County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

The estimates of economic impact contained herein were developed through a computer program designed by the Alexandria Design and Development Co., Inc. and operated by staff on Data Center's personal computers.

There is no commonly accepted definition of travel in use at this time. For the purposes of the estimates herein, "travel" is defined as activities associated with all overnight trips away from home, and day trips to places 100 miles or more away from the traveler's origin. The TEIM definition includes all overnight trips regardless of distance away from home, but excludes day trips to places less than 100 miles away from home.

The word "tourism" is avoided in this report because of its vague meaning. Some define tourism as all travel away from home while others use the dictionary definition which limits tourism to personal or pleasure travel.

The "travel industry," as used herein, refers to the collection of 14 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Appendix B: Glossary of Terms). These business types are defined by the Office of Management and Budget in its system of Standard Industrial Classifications (SIC).¹ In each case, the relevant SIC code is included.

A "travel expenditure" is assumed to take place whenever a traveler exchanges money for an activity considered part of his trip. Total travel expenditures are separated into 14 categories representing traveler purchases of goods and services at the retail level. Travel expenditures are allocated among states by simulating where the exchange of money for goods or services actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his destination, and some enroute.

"Economic impact" is represented by measures of spending, employment, payroll, business receipts and tax revenues generated by traveler spending. "Payroll" includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay and the value of payments in kind paid during the year to all employees. Payroll is reported before deductions for social security, income tax insurance, union dues, etc. This definition follows that used by the U.S. Census Bureau

¹Office of Management and Budget, U.S. Executive Office of the President, Standard Industrial Classification Manual, 1972, U.S. Government Printing Office, Washington, D.C., 1973, 649 pp.

Definition of Terms

in the quincentennial Census of Service Industries.²

"Employment" represents the number of jobs generated by traveler spending, both full and part-time. As such, it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment.³ "Tax revenues" include corporate income, individual income, sales and gross receipts, and excise taxes by level of government.⁴ "Business receipts" reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

Description of the Model

The basic data on travel activity levels (e.g., number of miles traveled by mode of transportation, the number of nights away from home spent by type of accommodation) are available from the U.S. Travel Data Center's National Travel Survey (NTS) and Smith Travel Research's Hotel and Motel Survey. Generally, the TEIM combines the activity levels for trips to places within the United States with the appropriate average costs of each unit of travel activity, (e.g., cost per mile by mode of transport, cost per night by type of accommodation), to produce estimates of the total amount spent on each of 14 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in campgrounds in maryland is multiplied by the average cost per night per travel party of staying in a campground facility in Maryland to obtain the estimate of traveler expenditures for camping accommodations.

The TEIM depends significantly on the U.S. Travel Data Center's National Travel Survey (NTS) and Smith Travel Research's Hotel and Motel Survey for its estimates of travel spending by state. Only three business categories' impacts (motor coach, railroad, and cruiselines) are estimated without the NTS or Smith Travel Research data. The impacts of motor coach travel are estimated with data from Greyhound Corporation and the Enos Foundation. Estimates of cruiseships' impacts are generated from Cruise Lines International Association data, and railroad travel estimates are from Amtrack.

The NTS is used to estimate activity levels for air travel, taxicabs, and automobile/truck ownership, operation, and rental. Smith Travel Research data is used to estimate hotel and motel revenues for each state. In conjunction with NTS data, Smith Travel Research data is also used to estimate the activity levels for other commercial lodging, second home use, visits to friends and relatives, and camper person nights. Estimates of the number of days and nights spent away from home for these activities are developed by the following method. Smith Travel Research's estimate of annual room revenues is divided by their estimate of average room rate to obtain the number of persons per room to produce an estimate of hotel/motel person nights. Other person nights and days (visits to friends and relatives, camping, second home use, and other lodging rentals) are estimated by applying the NTS regional hotel/motel person nights to other person nights ratio. For example, if it estimated by the NTS that camper person nights in a region, then the camper person nights in a state are estimated to be one-third of that state's estimated hotel/motel person nights.

The 1987 NTS comprised information on 5,937 qualifying trips reported by 4,233 respondents in more than 18 thousand interviews among 12 national probability samples of the U.S. population during the year. This volume of trips was not enough, however, to provide estimates for travel between every possible pair of states.

Consequently, the following methodology was developed by Dr. Darryl Jenkins, consultant to the Data Center, to derive estimates of the number of person-trips from each state as an origin to each state as a destination from the NTS.

First, NTS samples for 1986 and 1988 were adjusted to the 1987 base and combined with the 1987 sample. Then, a matrix of estimates of person-trips from every state as an origin to every state as a destination was estimated from the combined NTS sample using the "bootstrapping" method.

Bootstrapping is designed to increase the size of a sample in order to better apply parametric analysis. It assumes a given sample is representative of its overall population, and then constructs a larger sample by sampling with replacement from the original sample. The resulting distribution is the same as the original NTS sample but with many more observations available for conducting regression experiments.

²U.S. Bureau of the Census, <u>Census of Service Industries</u>, <u>1977</u>, <u>Area Series</u>, <u>United States</u>, U.S. Government Printing Office, Washington, D.C., 1979, p. A3.

³U.S. Department of Labor, <u>Handbook of Labor Statistics</u>, 1975, U.S. Government Printing Office, Washington, D.C., 1979, p. A3.

⁴Advisory Commission on Intergovernmental Relations, <u>State-local Finances: Significant Features and</u> <u>Suggested legislation, 1972</u> U.S. Government Printing Office, Washington, D.C., 1972, <u>passim</u>, and later editions.
The combined NTS sample for 1987 provided statistics significant at the .05 level for national and regional estimates but was inadequate for estimating state level persontrip volumes. Consequently, multiple samples were drawn from the NTS combined sample with replacement, ultimately providing over 300,000 observations from the original combined sample of nearly 18,000 observations.

Person-trip flows between the nine Census regions were examined and two regions were found to provide the most complete and reliable estimates of origindestination travel: the Middle Atlantic region (New York, New Jersey, Pennsylvania), and the East North Central region (Ohio, Indiana, Illinois, Michigan, Wisconsin).

Beginning with the Middle Atlantic region, person-trips (the dependent variable) between New York as an origin and each destination state for which there were reliable estimates were regressed against two independent variables: the populations of the state pairs and the straight-line distance between the centroids of New York and each of these states. Following is the regression equation that provided the best fit:

 $\ln Y^{(\text{genB2})} = A + \ln P^{(\text{genB2})} + \ln D^{(\text{genB2})} + \epsilon.$

where Y = person-trips between New York and another state

A = a constant term

genB2 = generalized beta two distribution

P = combined population of the two states

D = distance between the centroids of the two states

 ε = the error term

The residuals from the estimated equations were then plotted in a stem-leaf display for state pairs to identify their distribution. The same functional form as above best provided the best fit. Using this form, the residuals were then regressed against persontrips for each state pair, and the equation used to estimate the residual corresponding to each state-pair person-trip estimate. This estimate was the added to the state-pair person-trip estimate from the original regression to produce the final estimates of persontrips between states.

This method accounted for 100 percent of the variance, and the resulting estimates were within +2% and -2% of the direct estimates for each of the state pairs, indicating the equations were successful in allocating the residuals.

A similar process was used for New Jersey and Pennsylvania, the other states in

the Middle Atlantic region. The three sets of state pair estimates were aggregated into 8 region pairs and the estimates of origin-destination person-trip flows from the Middle Atlantic region to each of the other regions were compared with the direct estimates of these magnitudes from the National Travel Survey. The derived estimates of travel among region pairs were within +5% and -5% of the direct estimates in every case.

The process was further tested on the states of the East North Central region and produced similarly good results. Having validated these models for the two regions with the most reliable direct estimates, similar models were developed for the remaining state pairs. The aggregation of state pair estimates into region pairs indicated the models produced estimates within +5% and -5% of the NTS sample estimates for inter-regional travel.

The results include travel expenditures in each of the 14 categories for each state, which represent expenditures on overnight trips away from home, and day trips to places 100 miles or more away from home.

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 14 types of travel expenditures are associated with 14 different types of travel-related businesses. For example, traveler spending on commercial lodging in a state is related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

It is assumed that each job in a specific type of business in a state is supported by some amount of business receipts and that each dollar of wages and salaries is similarly supported by some dollar volume of business receipts. The ratios of employment to business receipts are computed for each industry in each state. These ratios are then multiplied by the total amount of business receipts generated by traveler spending in a particular type of business to obtain the measures of travel generated employment and payroll of each type of business in each state. For example, the ratio of employees to business receipts in Maryland commercial lodging establishments is multiplied by travel generated business receipts of these establishments to obtain traveler generated employment in commercial lodging. A similar process is used for the payroll estimates.

The Fiscal Impact Component of the TEIM is used to estimate traveler generated tax revenues of federal, state and local governments. The yield of each type of tax is related to the best measure of the relevant tax base available for each state consistent with the output of the Economic Impact Component. The ratios of yield to base for each type of tax in each state is then applied to the appropriate primary level output to obtain estimates of tax receipts generated by travel. For example, the ratio of Maryland State personal income tax collections to payroll in the state is applied to total travel generated payroll to obtain the estimate of state personal income tax receipts attributable to traveler spending in Maryland.

The 1987 benchmark estimates of travel expenditures, and travel generated employment, payroll and federal, state and local tax revenue, are updated for each successive year. Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and ES-202, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, the Data Center's National Travel Survey and other sources are used for this purpose. These data indicate the change in travel spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

Limitations of the Study

This study is designed to indicate the impact of U.S. traveler expenditures on employment, payroll, business receipts and tax revenue in each of the states. These impact estimates reflect the limitations inherent in the definition of travel expenditures. Two important classes of travel-related expenses have not been estimated due to lack of sufficient data. Consumers purchase certain goods and services in anticipation of a trip away from home. These include sports equipment (tennis racquet, skis, scuba gear, etc.), travel books and guides, and services such as language lessons and lessons for participatory sports (tennis, skiing, underwater diving, etc.). Although the magnitude of these purchases in preparation for a trip cannot be quantified, it is probably significant relative to overall travel expenditures.

The second type of spending not covered due to lack of sound, relevant data is the purchase of major consumer durables generally related to outdoor recreation on trips. While recreational vehicles (campers, motor homes, trailers and mobile homes) are covered, spending for boats and boating supplies, and off-road recreational vehicles such as trail bikes, dune buggies and snowmobiles are not. Further research is required in this area to estimate the average spending on items such as these by travelers.

Moreover, the TEIM records travel expenditures only for those states where travelers spent the night, originated, or were destined. Due to the nature of the <u>National</u> <u>Travel Survey</u>, expenditures could not be allocated to states passed through in a single day. It is believed these expenditures may be quite significant to certain "bridge" states between major population concentrations and major destinations.

The trip definition inherent in this study also limits the estimates of economic impact somewhat. Specifically excluded are the economic effects of U.S. traveler expenditures in this country pursuant to traveling to a foreign destination. Also excluded is the impact of day-trips to places less than 100 miles from home. While these latter trips may be quite numerous, intuitively, they appear to involve little economic impact since lodging expenditures and virtually all common carrier spending are excluded. Meal, entertainment and recreation expenditures on these trips also seem relatively insignificant.

These travel expenditures and impact estimates are based on household surveys of travel activity. Consequently, they are subject to all of the sampling and non-sampling errors inherent in sample surveys.

Most travel expenditure data collected is on a "type of purchase" rather than "point of purchase" basis. This means there is some incongruity in matching spending on different goods and services while traveling with the receipts, employment and payroll of different types of businesses. For example, all spending for meals is assumed to take place in eating and drinking places (SIC 58) or grocery stores (SIC 54), whereas some may actually occur in hotels or other commercial lodging places (701). This inconsistency does not appear to introduce major errors in the calculations and can only be corrected upon collection of point-of-purchase expenditure data.

APPENDIX B: GLOSSARY OF TERMS

Automobile Transportation Expenditure. This category includes a prorate share of the fixed costs of owning an automobile, truck, camper, or other recreational vehicle, such as insurance, license fees, tax, and depreciation costs. Also included are the variable costs of operating an automobile, truck, camper, or other recreational vehicle on a trip, such as gasoline, oil, tires, and repairs. The costs of renting an automobile or other motor vehicle are included in this category as well.

Automobile Transportation Industry. Automotive dealers and gasoline service stations (SIC 55); automotive rental and leasing without drivers (751).

Entertainment/Recreation Expenditure. Traveler spending on recreation facility user fees, admissions at amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Entertainment/Recreation Industry. Amusement and recreation services (SIC 79) and motion picture theaters (783).

Food Expenditure. Traveler spending in commercial eating facilities and grocery stores or carry-outs, as well as on food purchased for off-premise consumption.

Foodservice Industry. Eating and drinking places (SIC 58).

General Retail Trade Industry. This sector is defined to receive incidental purchases by travelers. It includes general merchandise group stores (SIC 53) and miscellaneous retail stores (59).

Incidental Purchase Expenditure. Traveler spending on retail trade purchases including gifts for others, medicine, cosmetics, clothing, personal services, souvenirs, and other items of this nature.

Incidental Purchase Industry. See "General Retail Trade Industry.

Lodging Industry. This industry includes hotels, motels, and motor hotels (SIC 701), camps and trailers parks (703), and general building contractors -- residential buildings (152) and operative builders (1531).

Public Transportation Expenditures. This includes traveler spending on air, bus, rail and boat/ship transportation, and taxicab or limousine service between airports and central cities. Also included are expenditures on "other transportation" as indicated in the 1977 National Travel Survey.

Public Transportation Industry. Air transportation (SIC 45), taxicab companies (412), intercity highway passenger transportation (413), National Railroad Passenger Corporation (Amtrak), and water transportation (44 except 4411). Also is the "dummy" industry of "other transportation."

Tourism. Generally avoided in this study, this can be used to refer to pleasure or personal travel, a subset of travel.

Travel. The act of taking a "trip" (gg.v).

Travel Arrangement Industry. This includes travel agencies, tour operators, and other services in arranging passenger transportation, and is covered under SIC 4722.

Traveler. Person taking a "trip" (gg.v).

Travel Expenditure. The exchange of money or the promise of money for goods or service while traveling, including any advance purchase of public transportation tickets, lodging or other items normally considered incidental to travel, but which may be purchased in advance of the trip. In addition, certain of the "fixed" or capital costs of owning a motor vehicle (including campers, motor homes, etc.) or a vacation or second home are included as associated with taking a trip. Generally, expenditures are assumed to take place at the point where the good or service is bought while traveling. The two exceptions to this rule are that the fixed costs of operating a motor vehicle while on a trip are allocated to the traveler's area of residence, and the "imputed rent" of spending nights in the traveler's own vacation home are allocated to the area visited.

Travel generated Employment. The number of jobs attributable to travel expenditures in an area. These estimates of employment follow the "establishment payroll survey definition" rather than the "household survey definition." Consequently, the TEIM estimates are more closely related to the number of jobs than to the number of employees. For a detailed description of the household and establishment survey differences, see Green, Gloria P., "Comparing Employment Estimates from Household and Payroll Surveys," Monthly Labor Review, Volume 92, No. 12, December, 1969.

<u>Travel generated Payroll.</u> This is the payroll, or wage and salary income, attributable to travel expenditures in an area. Payroll includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay, and the value of payments in kind (such as free meals and lodgings) paid during the year to all employees. Trips and gratuities received by employees from patrons and reported to employers are included. For corporations, it includes amounts paid to officers and executives; for unincorporated businesses, it does not include profit nor other compensation of proprietors or partners. Payroll is reported before deductions for social security, income tax, insurance, union dues, etc.

Travel generated Tax Receipts. These federal, state and local tax revenues attributable to travel in an area. For a given state locality, all or some of the taxes may apply. "Local" includes county, city or municipality, and township units of government actually collecting the receipts, and not the level that may end up receiving it through intergovernmental transfers.

Federal. These receipts include corporate income taxes, individual income taxes, employment taxes, gasoline excise taxes, and, airline ticket taxes.

State. These receipts include corporate income taxes, individual income taxes, sales and gross receipts taxes, and excise taxes.

Local. These include county and city receipts from individual and corporate income taxes, sales, excise and gross receipts taxes, and property taxes.

Trip. A trip occurs, for the purpose of the model, every time one or more persons goes to a place 100 miles or more away from home in one day, or is out-of-town one or more nights, and returns to his origin. Specifically excluded from this definition are: (1) travel as part of an operating crew on a train, plane, bus, truck or ship; (2) commuting to a place of work; (3) student trips to school or those taken while in school. Also excluded is foreign travel activity in the U.S.

Visitor. This term is usually limited to special studies of individual cities or metropolitan areas. It includes those not residing in the area under study who travel away from home overnight or on a day trip of 200 round-trip miles or more and visit the area. As a general rule, total travel impact on an area less the impact of area residents equals visitor impact.

Travel generated Wage and Salary Income. The same as "travel generated payroll."

APPENDIX C: SOURCES OF DATA

This appendix presents the sources of data used in this report. Only the most current year is presented.

Organizations

Air Transport Association American Automobile Association Amtrak American Society of Travel Agents Bureau of Labor Statistics, U.S. Department of Labor Cruise Lines International Association Iowa Department of Revenue Iowa Division of Employment Security Iowa Office of Travel and Tourism National Park Service Prentice Hall Travel Runzheimer International Ltd. Smith Travel Research

Publications, Reports, and Articles

<u>1991 Annual Report,</u> Internal Revenue Service, U.S. Government Printing Office, Washington, D.C., 1991

<u>Airport Activity Statistics of Certificated Route Carriers, 1991,</u> Federal Aviation Administration, U.S. Department of Transportation, U.S. Government Printing Office, Washington, D.C., 1991

Governmental Finances in 1989-90, U.S. Department of Commerce, Bureau of the Census, U.S. Government Printing Office, Washington, D.C., 1991

Highway Statistics, 1991, Federal Highway Administration, U.S. Department of Transportation, U.S. Government Printing Office, Washington, D.C., 1991

Monthly Energy Review, January-December 1991, Energy Information Administration, U.S. Department of Energy, U.S. Government Printing Office, Washington, D.C., 1991

"State and Regional Unemployment in 1991", February 1991, U.S. Department of Labor, Bureau of Labor Statistics, U.S., Government Printing Office, Washington, D.C., 1991

"Survey of Selling Costs, 1991" <u>Sales & Marketing Management</u>, 1991, Bill Communications Inc., New York, New York, 1991

Survey of Current Business, April 1991, Bureau of Economic Analysis, U.S. Department of Commerce, Bureau of the Census, U.S. Government Printing Office, Washington, D.C., 1991

<u>State Government Tax Collections in 1991,</u> U.S. Department of Commerce, Bureau of the Census, U.S. Government Printing Office, Washington, D.C., 1991

<u>Transportation in America.</u> Transportation Policy Associates, Eighth Edition, 1991, Washington, D.C.

<u>Worldwide Airport Traffic Report, 1991,</u> Airport Operators Council International, Washington, D.C., 1991

