

The Economic Impact of Travel on Iowa Counties 2015

A Study Prepared for the
Iowa Economic Development Authority
Iowa Tourism Office
By the
Research Department of the
U.S. Travel Association
Washington, D.C.
August 2016

U.S.
TRAVEL
ASSOCIATION

PREFACE

This study was conducted by the Research Department of the U.S. Travel Association for the **Iowa Economic Development Authority, Iowa Tourism Office**. The study provides preliminary 2015 and 2014 estimates of domestic traveler expenditures in Iowa and its 99 counties, as well as the employment, payroll income, and state and local tax revenue directly generated by these expenditures.

U.S. Travel Association
Washington, D.C.
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INTRODUCTION

This report presents preliminary 2015 estimates of the impact of U.S. resident traveler spending in Iowa and its 99 counties, as well as the employment, payroll income and tax revenue directly generated by the spending. For the purpose of comparison, 2014 impact data are also included in this report.

All estimates of the economic impact of travel contained in this volume are the product of the U.S. Travel Association's Travel Economic Impact Model (TEIM), a proprietary economic model developed expressly to indicate the expenditures, employment, payroll and tax revenue generated by travel away from home in the United States.

The TEIM was created to capture the highly complex nature of the U.S. travel industry at national, regional, state, and local levels. The TEIM was designed so that economic impact estimates could be compared across all fifty states and the District of Columbia, thereby allowing states and localities to assess their market share nationally, regionally or within the state.

The domestic component of TEIM is based on national surveys conducted by the U.S. Travel Association and other travel-related data developed by the U.S. Travel Association, various federal agencies, state government and private travel organizations each year. A summary of the methodology is provided in Appendix B.

U.S. residents traveling in Iowa include both state residents and out-of-state visitors traveling away from home overnight in paid accommodations, or on any overnight and day trips to places 50 miles or more away from home. Commuting to and from work; travel by those operating an airplane, bus, truck, train or other form of common carrier transportation; military travel on active duty; and travel by students away at school are all excluded from the model. In addition, the payroll and employment estimates represent impact generated in the private sector and exclude government supported payroll and employment.

Since additional data relating to travel and its economic impact in 2015 will become available subsequent to this study, U.S. Travel Association reserves the right to revise these estimates in the future.

EXECUTIVE SUMMARY

- Domestic travel spending in Iowa totaled \$8.1 billion (in current dollars) in 2015, representing an increase of 0.1 percent from 2014. This low growth was mainly caused by a large drop in motor fuel prices.
- Total payroll income received by domestic travel-generated employees and workers in Iowa increased 4.0 percent from 2014 to nearly \$1.3 billion in 2015.
- Domestic traveler expenditures directly generated 67,400 jobs in Iowa during 2015, a 1.4 percent increase from 2014. Domestic travel-generated jobs in Iowa comprised 4.3 percent of total state non-farm employment in 2015.
- On average, every \$119,626 spent by domestic travelers in Iowa during 2015 supported one job. Likewise, every dollar spent by domestic travelers produced 15.8 cents in payroll income for Iowa residents in 2015.
- Domestic traveler spending in Iowa directly generated \$1,026.7 million in federal, state, and local tax revenue in 2015, up 14.1 percent from 2014. This high growth was partially due to increases in the state motor fuel tax rates.
- Polk County, which includes the city of Des Moines, generated nearly \$1.9 billion in domestic traveler expenditures to lead all Iowa counties in 2015.
- Fifteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2015. Thirteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

NATIONAL SUMMARY 2015

The U.S. economy on the whole performed relatively well in 2015, with real Gross Domestic Product (GDP) growing 2.6 percent from 2014. Matching the previous year's growth, the U.S. economy outpaced most other advanced economies in 2015.

The first three quarters of 2015 were characterized by solid economic growth. In the first quarter, a 2.0 percent annualized increase in real GDP reflected strong gains in business investment and inventory along with moderate consumer spending. These gains were balanced out by decreased trade, amidst the global headwinds of a strong dollar and the temporary west coast port shutdown.

In the second quarter, a 2.6 percent annualized increase in real GDP was encouraging, but masked a shift in the economy away from business investment and inventory spending. Trade and personal consumption increased their contribution to real GDP growth, but business investment slowed down considerably and inventories were not drawn down enough to warrant more investment, creating a drag on the economy.

This drag continued into the third quarter: 2.0 percent annualized growth in real GDP reflected continued slow-downs in business investment, especially in structures and inventory. In fact, despite a robust quarter of consumer spending (2.7 percent annualized), inventories were drawn down by a lesser amount than in previous quarters, prompting less incentive for businesses to improve inventory investment. Finally, in the fourth quarter, a consumer spending slowdown added more downward pressure on the economy; continued sluggishness from business investment and inventories dragged the economy down to 0.9 percent growth.

Global headwinds of low oil prices and a strong dollar continued to force a startling disconnect in the U.S. economy in 2016. Consumer spending increased, especially in the second quarter (6.2 percent annualized). However, this contribution was counterbalanced by substantial decreases in business investment and inventories (business investment, for instance, was down 9.7 percent annualized in the second quarter). The result was a very slow first half of 2016 for the economy: 0.8 percent annualized real GDP growth in the first quarter and 1.2 percent in the second quarter. While inventories may draw down enough with robust consumer spending numbers, it remains to be seen whether continued uncertainty will affect future business investment.

The U.S. employment situation continued to improve in 2015: nonfarm employment increased by 2.7 million jobs from December 2014 to 143.4 million jobs in December 2015. During the same period, the travel industry directly added 102,000 jobs, reaching 8.2 million in December 2015. Total personal income for 2015 also grew a solid 4.4 percent. Both indicators have seen steady gains coming into the first three months of 2016, with disposable income reaching high monthly gains for January and March of 0.4 percent per month.

Consumer inflation was mild in 2015. The overall CPI edged up just 0.1 percent and, excluding food and energy prices which tend to be more volatile, core CPI edged up 1.8 percent compared to 2014. The U.S. Travel Association's TPI, however, decreased sharply by 2.7 percent over the same period. Since spending on gasoline is one of the most important components of travelers'

expenditures, especially for auto travel, decreases in motor fuel prices during 2015 were a primary reason the TPI grew at a slower rate than CPI.

Table 1: Overall U.S. Economic Indicators, 2013-2015

<u>Sector</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
Nominal gross domestic product (\$ Billions)	16,691.5	17,393.1	18,036.6
Real gross domestic product (\$Billions) *	15,612.2	15,982.3	16,397.2
Real disposable personal income (\$Billions) *	11,527.6	11,931.0	12,343.3
Real personal consumption expenditures (\$Billions) *	10,565.4	10,868.9	11,214.7
Consumer price index**	233.0	236.7	237.0
Travel Price Index**	275.6	279.6	272.4
Nonfarm payroll employment (Millions)	136.4	139.0	141.9
Unemployment rate (%)	7.4	6.2	5.3
Percentage change from previous year			
Nominal gross domestic product	3.3%	4.2%	3.7%
Real gross domestic product	1.7%	2.4%	2.6%
Real disposable personal income	-1.4%	3.5%	3.5%
Real personal consumption expenditures	1.5%	2.9%	3.2%
Consumer price index	1.5%	1.6%	0.1%
Travel Price Index	0.9%	1.5%	-2.6%
Non-farm payroll employment	1.6%	1.9%	2.1%

Source: BEA, BLS, U.S. Travel Association

* In chained 2009 dollars

** 1982-84=100

U.S. Travel Volume in 2015

Helped by a significant decline in gasoline prices, U.S. domestic travel, including leisure and business travel, increased notably by 3.3 percent to a total of 2.2 billion person-trips in 2015. A person-trip is defined as one person on a trip away from home overnight in paid accommodations, or on a day or overnight trip to places 50 miles or more, one-way, away from home.

Domestic leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, increased 3.6 percent in 2015 to 1.7 billion person-trips and is forecasted to increase 2.1 percent in 2016. Leisure travel accounted for 78.9 percent of all U.S. domestic travel in 2015. Domestic business travel grew 1.9 percent in 2015 to 459.4 million person-trips and is expected to increase 0.6 percent in 2016.

International inbound travelers, including overnight visitors from Canada, Mexico and overseas, made 77.5 million visits¹ to the United States in 2015. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 38.4 million in 2015 and accounted for half of total international arrivals to the United States, according to U.S. Department of Commerce.

Canadian overnight arrivals to the U.S are estimated to have decreased from 23 million in 2014 to 21 million in 2015, while Mexican overnight arrivals are estimated to have increased from 17 million in 2014 to 18 million in 2015.

Travel Expenditures in 2015

Total domestic and international travelers spending in the U.S. increased 2.1 percent, growing from \$928 billion in 2014 to \$947 billion in 2015, not adjusted for inflation (excluding international airfare payments to the U.S airlines). After a slight lull, the U.S. Travel Association expects total domestic and international traveler expenditures to pick up to 2.7 percent growth in 2016.

Domestic travel expenditures grew 2.7 percent from 2014 to \$814 billion in 2015. International travelers, on the other hand, spent \$133 billion in the U.S. in 2015, a decrease of 2.0 percent² from 2014. It should be noted here that this traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenses on education, health care and expenditures by cross-border day-trip visitors and seasonal workers. International traveler spending is expected to bounce back in 2016, increasing 2.5 percent from 2015.

International airfare receipts are total passenger fares paid by international residents on U.S. flag air carriers. In 2015, international airfare receipts totaled \$42 billion, down 5.3 percent from 2014. In the first six months of 2016, international airfare receipts decreased 6.2 against the first quarter of 2015.

Leisure traveler spending totaled \$651 billion in 2015, a 0.9 percent increase from 2014, accounting for 68.7 percent of all traveler expenditures. Business traveler spending increased 4.7 percent over 2014 to \$296 billion in 2015, 31.3 percent of all traveler expenditures.

¹ This number does not match the total number of international visitations published by the Department of Commerce. Published estimates from the Department of Commerce for 2014 and 2015 are not comparable to each other or previous years because (1) in 2014, additional 1+ night visitations were included due to a technical-processing change; (2) in 2015, the published numbers reflect the availability of additional electronic records.

² Reflects Department of Commerce data issued in June and does not include any revisions made in July.

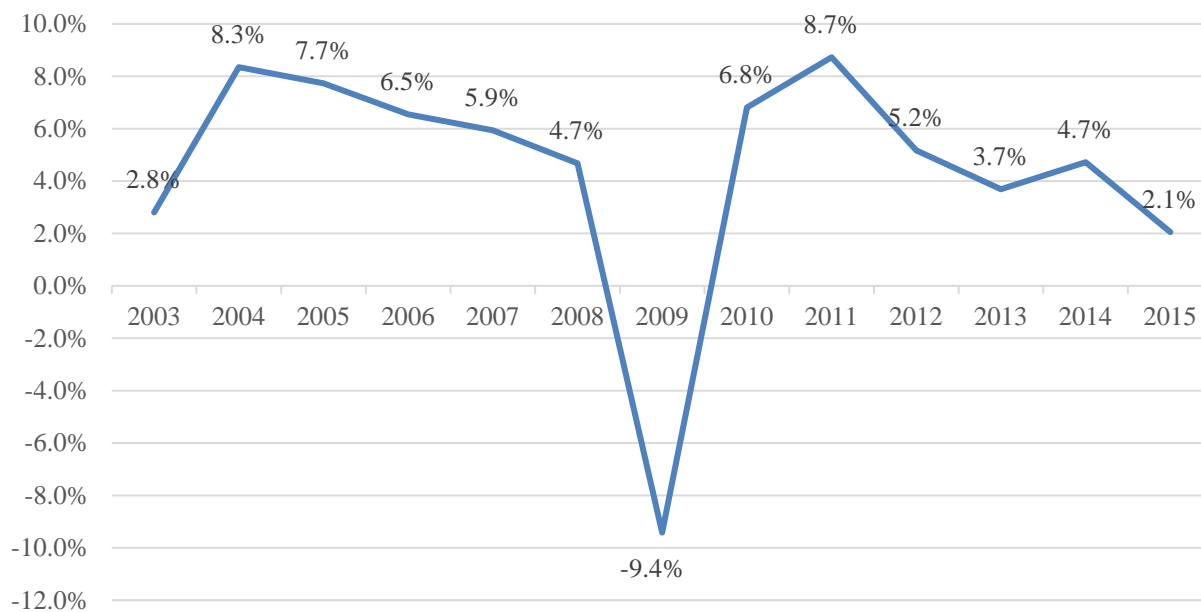
Table 2: Travel Expenditures - U.S. Nationwide

Category	2014 Spending (\$ Billions)			2015 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$160.6	\$15.0	\$175.6	\$162.9	\$14.9	\$177.8
Auto Transportation	161.2	1.6	162.8	148.0	1.6	149.6
Lodging	142.1	39.5	181.6	154.9	39.9	194.8
Foodservice	191.5	28.9	220.4	206.9	28.4	235.4
Entertainment & Recreation	82.2	10.6	92.7	83.8	10.6	94.5
General Retail Trade	54.8	40.1	94.9	57.5	37.5	95.0
Total	\$792.4	\$135.7	\$928.1	\$814.1	\$133.0	\$947.1

Source: U.S. Travel Association

* Excludes international passenger fare payments.

**Changes of Direct Travel Expenditures*
in the U.S., 2003-2015**



Source: U.S. Travel Association.

*Excludes international passenger fare payments.

Travel Employment in 2015

The year 2015 continued the banner jobs recovery seen in the years following the Great Recession. After bottoming out in February 2010, the nonfarm payroll employee count, as measured by the Bureau of Labor Statistics (BLS), made a full recovery from the Great Recession in May 2014, surpassing the pre-recession jobs peak of nearly 138.4 million jobs in January 2008. The positive momentum continued: after adding three million jobs during the 12 months of 2014, the economy added another 2.7 million in 2015 to reach 143.1 million by December.

After peaking at 9.6 percent in 2010, the unemployment rate fell to an average monthly rate of 5.3 percent in 2015, starting at 5.7 percent in January and ending at 5.0 percent in December. The unemployment rate fell to 4.9 percent in January and February 2016, but returned to 5.0 percent in April, still above the 4.4 percent pre-recession low.

American service industries, of which the travel industry is a part, played a major role in the jobs recovery, accounting for 84.1 percent of the jobs recovered from 2010-2015. The travel industry joined healthcare, administrative services, accommodation and foodservices and retail trade, as one of the leading growth industries in terms of overall jobs created from 2010 to 2015. Travel accounted for 6.8 percent of nonfarm jobs created from 2010 to 2015, despite holding a 5.8 percent share of all nonfarm jobs in 2015.

In 2015, traveler spending directly supported over 8.2 million U.S. jobs, including both full-time and seasonal/part-time positions, up 1.9 percent from 2014. This job increase constituted 5.2 percent of total nonfarm job growth since 2014.

These 8.2 million travel-generated jobs constituted 5.8 percent of total nonfarm employment in the U.S. in 2015. Without these jobs, the 2015 national unemployment rate of 5.3 percent would have nearly doubled to 10.5 percent, an increase of 5.2 percentage points.

The travel industry remained a strong creator of jobs despite the Great Recession, passing its own pre-recession peak (7.7 million in 2008) in 2014. Between 2005 and 2015, total nonfarm employment in the U.S. increased 5.8 percent while travel-generated employment increased 8.6 percent. Focusing on the post-recession recovery, travel-generated employment increased 10.7 percent from 2010 to 2015, whereas total nonfarm employment increased 8.8 percent from the same years.

Table 3: Travel Generated Employment - U.S. Nationwide

Category	2014 Employment (Thousands)			2015 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	891.2	64.3	955.6	923.2	65.1	988.2
Auto Transportation	273.4	2.0	275.4	279.8	2.0	281.8
Lodging	1,245.6	255.2	1,500.8	1,276.3	243.7	1,520.0
Foodservice	2,804.9	417.7	3,222.6	2,907.9	396.8	3,304.7
Entertainment & Recreation	1,161.6	225.2	1,386.8	1,174.8	225.1	1,399.9
General Retail Trade	336.7	164.3	500.9	341.6	151.7	493.4
Travel Planning	165.4	0.0	165.4	169.4	0.0	169.4
Total	6,878.8	1,128.7	8,007.4	7,073.0	1,084.4	8,157.4

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

Table 4: U.S. Travel Forecasts

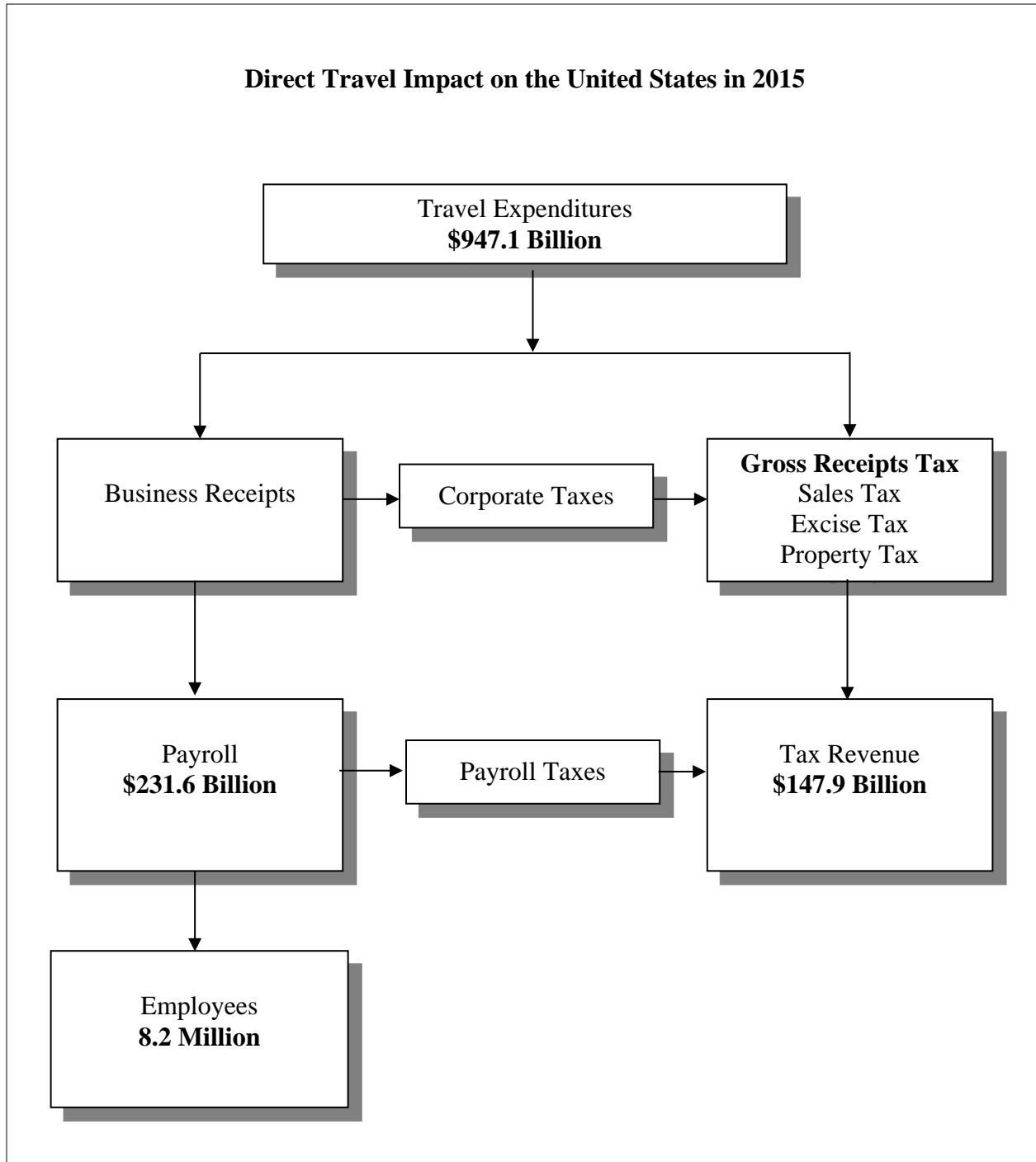
	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
Real GDP (\$Billions) *	14,418.7	14,783.8	15,020.6	15,354.6	15,612.2	15,982.3	16,397.2	18,500.8	19,331.9	20,253.2
Unemployment Rate (%)	9.3	9.6	8.9	8.1	7.4	7.4	5.3	4.9	4.6	4.7
Consumer Price Index (CPI) **	214.5	218.1	224.9	229.6	233.0	236.7	237.1	240.0	245.2	250.4
Travel Price Index (TPI) **	241.5	250.7	266.9	273.0	275.6	279.6	272.4	275.1	283.7	293.3
Total Travel Expenditures in U.S. (\$ Billions)	699.8	747.4	812.7	854.7	886.2	928.1	947.1	973.0	1,003.1	1,045.6
U.S. Residents	609.1	640.6	694.0	728.0	751.2	792.4	814.1	836.7	860.5	893.4
International Visitors ***	90.7	106.9	118.6	126.7	135.0	135.7	133.0	136.3	142.6	152.1
Total International Visitors to the U.S. (Millions)	55.1	60.0	62.8	66.7	70.0	74.8	77.5	79.1	81.7	85.4
Overseas Arrivals to the U.S. (Millions)	23.8	26.4	27.9	29.8	32.0	34.4	38.4	39.9	41.3	43.7
Total Domestic Person-Trips (Millions)	1,900.1	1,963.7	1,997.5	2,030.3	2,059.6	2,109.3	2,178.2	2,217.1	2,249.7	2,287.5
Business	434.3	446.4	440.7	439.4	444.9	451.0	459.4	462.2	466.1	471.7
Leisure	1,465.8	1,517.3	1,556.8	1,590.9	1,614.7	1,658.3	1,718.8	1,754.9	1,783.6	1,815.8
Percent Change from Previous Year (%)										
Real GDP	-2.8	2.5	1.6	2.2	1.7	2.4	2.6	2.0	2.4	2.3
Consumer Price Index (CPI)	-0.4	1.6	3.2	2.1	1.5	1.6	0.1	1.2	2.2	2.1
Travel Price Index (TPI)	-6.3	3.8	6.5	2.3	0.9	1.5	-2.6	1.0	3.1	3.4
Total Travel Expenditures in U.S.	-9.4	6.8	8.7	5.2	3.7	4.7	2.1	2.7	3.1	4.2
U.S. Residents	-8.8	5.2	8.3	4.9	3.2	5.5	2.7	2.8	2.8	3.8
International Visitors	-13.3	17.8	11.0	6.8	6.5	0.5	-2.0	2.5	4.6	6.7
Total International Visitors to the U.S.	-5.2	8.9	4.7	6.1	5.0	NA ^a	NA ^b	2.1	3.2	4.5
Overseas Arrivals to the U.S.	-6.3	11.0	5.8	6.7	7.7	NA ^a	NA ^b	3.9	3.6	5.7
Total Domestic Person-Trips	-3.3	3.3	1.7	1.6	1.4	2.4	3.3	1.8	1.5	1.7
Business	-5.8	2.8	-1.3	-0.3	1.3	1.4	1.9	0.6	0.9	1.2
Leisure	-2.5	3.5	2.6	2.2	1.5	2.7	3.6	2.1	1.6	1.8

Sources: U.S. Travel Association

* In chained 2009 dollars. **1982-84=100. *** International traveler spending does not include international passenger fares.

^a According to the National Travel and Tourism Office, the completion of the I-94 automation project now provides a more accurate determination of how many nights were spent in the United States which makes it possible to be more inclusive of one-night stays (travelers from overseas countries) given that the arrival-departure record match is now more complete and accurate. With the inclusion of one-night stay travelers in 2014, arrivals data from overseas countries in 2013 and 2014 are basically not comparable.

^b 2015 changes reflect a combination of additional records counted and market condition. As such, 2015 data is not comparable to earlier years.



Source: U.S. Travel Association, BEA

*Does not include international passenger fare payments and other economic impact generated by these payments.

DOMESTIC TRAVEL IMPACT ON IOWA

TRAVEL EXPENDITURES

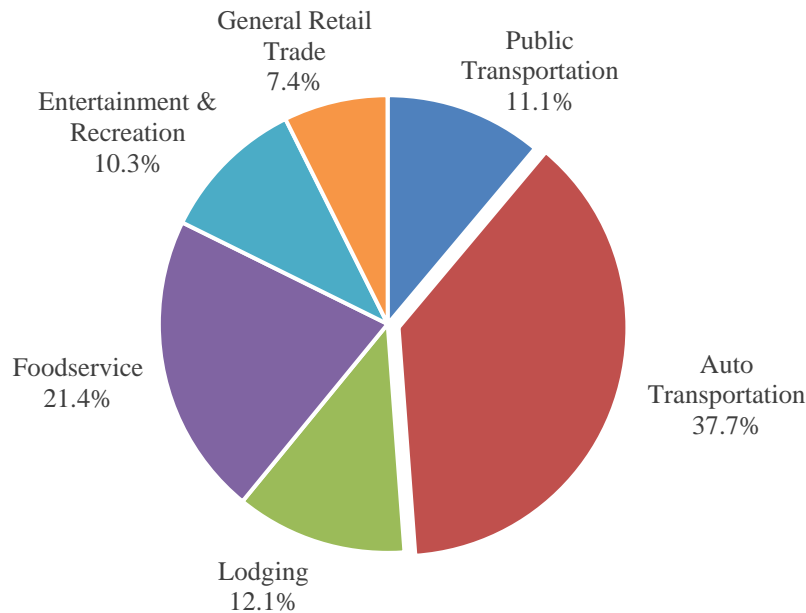
Domestic traveler spending in Iowa totaled close to \$8.1 billion (in current dollars) during 2015, representing an increase of 0.1 percent from 2014. This low growth was mainly caused by a large drop in motor fuel prices.

Auto transportation, foodservices and lodging are the top three spending categories for domestic travelers in Iowa. Domestic travelers spent \$3.0 billion on auto transportation, down 8.2 percent from 2014. This sector accounted for 37.7 percent of total domestic travelers' spending in Iowa.

Accounting for 21.4 percent of the state total domestic traveler expenditures, spending on foodservice rose 6.0 percent to \$1.7 billion in 2015. Domestic travelers' spending on lodging was up 8.0 percent to \$974.7 million in 2015.

In 2015, domestic travelers' spending on public transportation was up 3.5 percent from 2014 to \$895.4 million. Domestic travelers spent \$834.0 million on the entertainment and recreation sector in 2015, up 5.7 percent from 2014. Domestic travelers' spending on general retail increased 5.2 percent to \$593.1 million in 2015.

**Domestic Travel Expenditures in Iowa in 2015
by Industry Sector**



1. Foodservice sector includes restaurants, grocery stores and other eating and drinking establishments.

2. Lodging sector consists of hotels and motels, campgrounds, and ownership or rental of vacation or second homes.

3. Public transportation sector comprises air, intercity bus, rail, boat or ship, and taxicab or limousine service.

4. Auto transportation sector includes privately-owned vehicles that are used for trips (e.g., automobiles, trucks, campers or other recreational vehicles), gasoline stations, and automotive rental.

5. General retail trade sector includes gifts, clothes, souvenirs, and other incidental retail purchases.

6. Entertainment and recreation sector includes such items as golf, skiing and gaming.

Domestic Travel Expenditures

Table 5: Domestic Travel Expenditures in Iowa by Industry Sector, 2014-2015

<i>2015 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
Public Transportation	\$895.4	11.1%
Auto Transportation	3,043.0	37.7%
Lodging	974.7	12.1%
Foodservice	1,724.0	21.4%
Entertainment & Recreation	834.0	10.3%
General Retail Trade	593.1	7.4%
Total	\$8,064.1	100.0%
 <i>2014 Travel Expenditures</i>		
Public Transportation	\$864.9	10.7%
Auto Transportation	3,313.9	41.1%
Lodging	902.1	11.2%
Foodservice	1,625.6	20.2%
Entertainment & Recreation	788.9	9.8%
General Retail Trade	563.7	7.0%
Total	\$8,059.2	100.0%
 <i>Percent Change</i> <i>2015 over 2013</i>		
Public Transportation	3.5%	
Auto Transportation	-8.2%	
Lodging	8.0%	
Foodservice	6.0%	
Entertainment & Recreation	5.7%	
General Retail Trade	5.2%	
Total	0.1%	

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

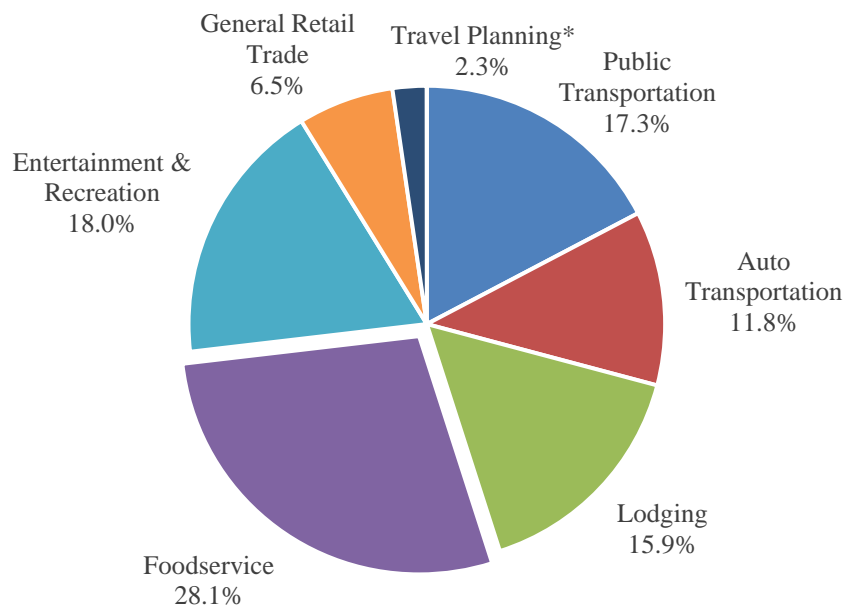
Travel-generated payroll is defined as the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry sectors depending on the labor content and the wage structure of each sector.

In 2015, total payroll income received by domestic travel-generated employees and workers in Iowa increased 4.0 percent from 2014 to nearly \$1.3 billion. On the average, every dollar spent by domestic travelers produced 15.8 cents in payroll income in Iowa during 2015.

The foodservice sector, which posted the highest share of payroll (28.1%) among the seven industry sectors investigated in this report, was up by 6.3 percent from 2014 to \$359.3 million.

Entertainment and recreation, the second largest sector (18.0%) in the Iowa travel industry by domestic travel-generated payroll, increased 2.9 percent from 2014 to \$230.6 million. The public transportation sector followed entertainment and recreation sector very closely, reaching \$221.2 million in 2015.

**Domestic Travel-Generated Payroll in Iowa in 2015
by Industry Sector**



Domestic Travel-Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2014-2015

<i>2015 Payroll</i>	<u>Total</u> <u>(\$ Millions)</u>	<u>% of Total</u> <u>(Percent)</u>
Public Transportation	\$221.2	17.3%
Auto Transportation	151.3	11.8%
Lodging	203.2	15.9%
Foodservice	359.3	28.1%
Entertainment & Recreation	230.6	18.0%
General Retail Trade	82.9	6.5%
Travel Planning*	29.6	2.3%
Total	\$1,278.0	100.0%
 <i>2014 Payroll</i>		
Public Transportation	\$223.7	18.2%
Auto Transportation	140.2	11.5%
Lodging	193.8	13.7%
Foodservice	337.9	26.5%
Entertainment & Recreation	224.1	20.8%
General Retail Trade	81.2	6.5%
Travel Planning*	27.6	2.6%
Total	\$1,228.6	100.0%
 <i>Percent Change</i> <i>2015 over 2014</i>		
Public Transportation	-1.1%	
Auto Transportation	7.9%	
Lodging	4.8%	
Foodservice	6.3%	
Entertainment & Recreation	2.9%	
General Retail Trade	2.1%	
Travel Planning*	7.1%	
Total	4.0%	

Source: U.S. Travel Association

* Refers to payroll income that goes to travel agents, tour operators, and other travel service employees who arrange passenger transportation, lodging, tours and other related services.

TRAVEL-GENERATED EMPLOYMENT

The most impressive contribution of travel and tourism to the Iowa economy is the number of businesses and jobs it supports. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations. Including full-time and seasonal/part-time positions, the state's domestic travel-generated jobs in 2015 increased 1.4 percent from 2014 to 67,400.

On the average, every \$119,626 spent by domestic travelers in Iowa directly supported one job in 2015.

The 67,400 jobs supported by domestic travel in Iowa comprised 4.3 percent of state's total non-agricultural employment during 2015. Without these jobs generated by domestic travel, Iowa's 2015 unemployment rate of 3.7 percent would have been 4.0 percentage points higher, or 7.6 (rounding) percent of the labor force.

The foodservice sector that includes restaurants and other eating and drinking establishments provided more jobs than any other industry sector investigated in this report. During 2015, 25,800 jobs in this sector were supported directly by domestic travel in Iowa, accounting for 38.2 percent of total domestic travel-generated jobs in the state. Employment in this sector increased 2.0 percent from 2014.

Domestic travel directly supported 12,500 jobs in the entertainment and recreation sector in 2015, the second largest component of the state total. The lodging sector supported 12,100 job in 2015.

**Domestic Travel-Generated Employment in Iowa in 2015
by Industry Sector**

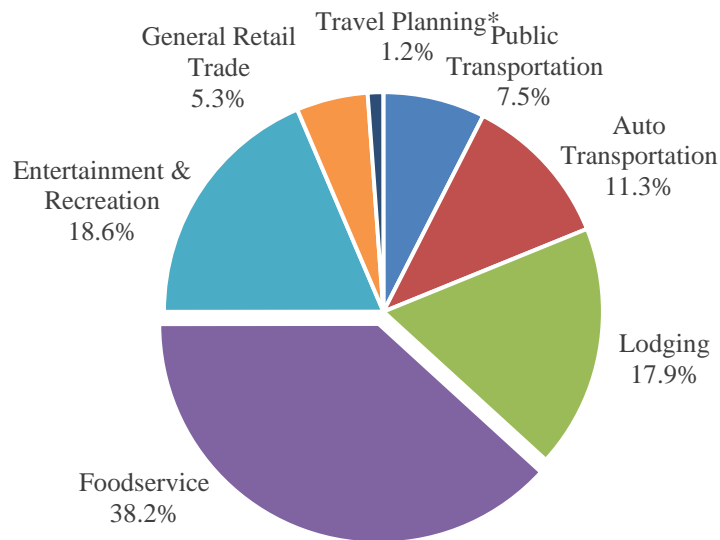


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2014-2015

<i>2015 Employment</i>	Total (Thousand)	% of Total (Percent)
Public Transportation	5.1	7.5%
Auto Transportation	7.6	11.3%
Lodging	12.1	17.9%
Foodservice	25.8	38.2%
Entertainment & Recreation	12.5	18.6%
General Retail Trade	3.5	5.3%
Travel Planning*	0.8	1.2%
Total	67.4	100.0%
<i>2014 Employment</i>		
Public Transportation	5.1	7.7%
Auto Transportation	7.4	11.1%
Lodging	11.9	17.9%
Foodservice	25.3	38.0%
Entertainment & Recreation	12.5	18.8%
General Retail Trade	3.5	5.3%
Travel Planning*	0.8	1.2%
Total	66.5	100.0%
<i>Percent Change 2015 over 2014</i>		
Public Transportation	-1.4%	
Auto Transportation	3.4%	
Lodging	1.5%	
Foodservice	2.0%	
Entertainment & Recreation	0.5%	
General Retail Trade	1.6%	
Travel Planning*	-3.1%	
Total	1.4%	

Source: U.S. Travel Association

* Refers to jobs created in travel arrangement firms such as travel agencies, wholesale and retail tour companies, and other travel-related service businesses.

TRAVEL-GENERATED TAX REVENUE

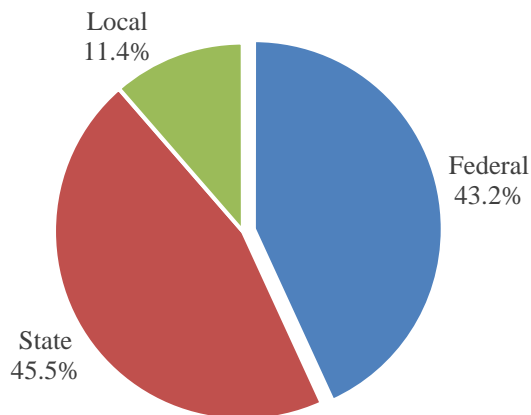
Travel tax receipts are defined in this report as the federal, state and local tax revenues attributable to travel spending in Iowa. Travel-generated tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public programs.

In 2015, total tax revenues directly generated by domestic travelers' spending in Iowa grew 14.1 percent from 2014 to a total of \$1,026.7 million. The federal government collected a total of \$443.1 million from domestic traveler spending, an increase of 7.1 percent. The tax revenue collected by the federal government accounted for 43.2 percent of all domestic travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.5 cents for federal tax coffers.

The tax revenue generated by domestic travelers' spending for Iowa's state treasury rose 24.6 percent to a total of \$466.7 million, accounting for 45.5 percent of all domestic travel-generated tax revenue for 2015. This high growth was largely caused by increases on state motor fuel tax rates. On average, each domestic travel dollar produced 5.8 cents in tax revenue for Iowa's state government.

The tax revenue collected by the local governments (counties and cities) was 5.0 percent higher than in 2014, for a total of \$116.9 million. Each domestic travel dollar produced 1.4 cents for local tax coffers.

Domestic Travel-Generated Tax Revenue in Iowa in 2015 by Level of Government



Domestic Travel-Generated Tax Revenue

Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2014-2015

<i>2015 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$443.1	43.2%
State	466.7	45.5%
Local	116.9	11.4%
Total	\$1,026.7	100.0%
 <i>2014 Tax Revenue</i>		
Federal	\$413.6	46.0%
State	374.7	41.7%
Local	111.3	12.4%
Total	\$899.7	100.0%
 <i>Percent Change 2015 over 2014</i>		
Federal	7.1%	
State	24.6%	
Local	5.0%	
Total	14.1%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2015, domestic travel expenditures in Iowa totaled close to \$8.1 billion (in current dollars), representing an increase of 0.1 percent from 2014. This spending directly generated 67,400 jobs and nearly \$1.3 billion in payroll income. Additionally, a total of \$583.6 million in tax revenues was generated for state and local governments.

Travel expenditures occurred in all 99 Iowa counties. The top five counties in Iowa received just over \$4.0 billion in direct domestic travel expenditures, accounting for a half of the state total. Domestic travel spending in the top five counties generated \$692.6 million in payroll (54.2 percent of the state total) and 35,600 jobs (52.8 percent of the state total) in 2015.

DOMESTIC TRAVEL IMPACT IN TOP 5 COUNTIES

Polk County, including the city of Des Moines, led all counties in domestic traveler expenditures, payroll income and jobs directly generated by these expenditures in 2015. Domestic traveler expenditures in Polk County reached nearly \$1.9 billion, accounting for 23.5 percent of the state total. These expenditures generated \$342.3 million in payroll income and 16,600 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$771.9 million in domestic travel spending in 2015, representing 9.6 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$133.2 million and 6,300 jobs.

Scott County posted \$624.1 million in domestic expenditures to rank third. These expenditures generated \$99.5 million in payroll as well as 6,200 jobs within the county.

Johnson County ranked fourth with \$388.6 million in domestic travel expenditures. These travel expenditures benefited county residents with \$60.6 million in payroll income and 3,700 jobs.

Black Hawk County ranked fifth by domestic travel spending in 2015. Domestic travelers spent \$351.7 million in the county, generating \$56.6 million in payroll income and 2,900 jobs.

Domestic Travel Impact on Iowa - Top 5 Counties

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2014-2015

2015 Travel Impact

<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
POLK	\$1,898.1	\$342.3	16.6	\$99.9	\$31.2
LINN	771.9	133.2	6.3	39.9	11.8
SCOTT	624.1	99.5	6.2	39.5	9.8
JOHNSON	388.6	60.6	3.7	22.4	6.2
BLACK HAWK	351.7	56.6	2.9	18.2	4.8
FIVE COUNTY TOTAL	\$4,034.4	\$692.2	35.6	\$219.9	\$63.8
STATE TOTALS	\$8,064.1	\$1,278.0	67.4	\$466.7	\$116.9
FIVE COUNTY SHARE	50.0%	54.2%	52.8%	47.1%	54.6%

2014 Travel Impact

POLK	\$1,890.7	\$328.2	16.3	\$79.9	\$29.6
LINN	770.3	128.0	6.2	32.0	11.2
SCOTT	621.7	95.4	6.1	31.6	9.3
JOHNSON	387.0	58.1	3.6	17.9	5.9
BLACK HAWK	351.0	54.3	2.8	14.6	4.6
FIVE COUNTY TOTAL	\$4,020.7	\$663.9	35.0	\$175.9	\$60.6
STATE TOTALS	\$8,059.2	\$1,228.6	66.5	\$374.7	\$111.3
FIVE COUNTY SHARE	49.9%	54.0%	52.7%	46.9%	54.5%

Percent Change - 2015 over 2014

POLK	0.4%	4.3%	1.7%	25.0%	5.3%
LINN	0.2%	4.1%	1.5%	24.8%	5.1%
SCOTT	0.4%	4.3%	1.7%	25.0%	5.3%
JOHNSON	0.4%	4.3%	1.7%	25.1%	5.3%
BLACK HAWK	0.2%	4.1%	1.5%	24.8%	5.1%
FIVE COUNTY TOTAL	0.3%	4.3%	1.7%	25.0%	5.2%
STATE TOTALS	0.1%	4.0%	1.4%	24.6%	5.0%

Source: U.S. Travel Association

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the U.S Travel's Travel Economic Impact Model for Iowa 2014 and 2015 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2015 travel expenditures, travel-generated payroll and employment, and state tax revenue and the local tax revenue for each.

Table B ranks the counties in order of 2015 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2015.

Table D shows the percent change in 2015 over 2014 estimates for each of the measures of economic impact.

Table E shows the counties listed alphabetically, with 2014 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical by County, 2015

2015 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2015					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
ADAIR	\$16.18	\$1.53	0.09	\$0.77	\$0.11
ADAMS	2.64	0.30	0.02	0.20	0.03
ALLAMAKEE	40.21	3.91	0.20	2.42	0.98
APPANOOSE	17.39	2.09	0.11	1.15	0.24
AUDUBON	5.04	0.53	0.02	0.41	0.05
BENTON	18.30	1.71	0.10	1.42	0.12
BLACK HAWK	351.69	56.58	2.88	18.16	4.81
BOONE	25.98	3.02	0.16	1.86	0.21
BREMER	53.96	6.88	0.45	3.20	0.39
BUCHANAN	26.75	2.59	0.13	1.82	0.30
BUENA VISTA	29.13	3.71	0.20	1.77	0.27
BUTLER	8.59	0.69	0.03	0.65	0.05
CALHOUN	10.30	1.20	0.06	0.78	0.26
CARROLL	56.55	7.30	0.44	3.47	0.43
CASS	26.33	2.85	0.16	1.70	0.18
CEDAR	22.14	2.50	0.13	1.67	0.29
CERRO GORDO	191.09	26.10	1.50	10.91	3.30
CHEROKEE	14.65	2.17	0.12	1.22	0.13
CHICKASAW	10.36	1.59	0.10	0.79	0.12
CLARKE	25.13	2.95	0.18	1.60	0.21
CLAY	103.94	22.41	0.73	2.94	1.34
CLAYTON	33.47	4.47	0.25	2.13	0.66
CLINTON	116.28	16.67	0.97	7.00	1.52
CRAWFORD	20.95	3.30	0.18	1.55	0.19
DALLAS	185.81	29.62	1.79	11.09	1.64
DAVIS	6.86	0.66	0.04	0.44	0.08
DECATUR	13.18	1.05	0.06	0.59	0.11

Table A: Alphabetical by County, 2015

2015 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2015 (Continued)					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
DELAWARE	8.58	0.90	0.05	0.58	0.09
DES MOINES	132.62	23.60	1.05	6.55	1.92
DICKINSON	276.12	33.90	1.98	17.69	4.99
DUBUQUE	329.27	52.59	2.87	18.35	4.49
EMMET	11.09	1.44	0.07	0.77	0.13
FAYETTE	16.95	1.75	0.09	1.09	0.14
FLOYD	18.19	2.74	0.12	1.11	0.17
FRANKLIN	11.70	1.25	0.07	0.82	0.07
FREMONT	14.90	2.03	0.12	0.96	0.14
GREENE	6.32	0.69	0.03	0.44	0.08
GRUNDY	5.15	0.72	0.04	0.44	0.05
GUTHRIE	12.81	1.86	0.09	1.25	0.32
HAMILTON	23.94	3.05	0.18	1.51	0.19
HANCOCK	6.16	0.90	0.04	0.44	0.10
HARDIN	22.31	2.12	0.10	1.20	0.16
HARRISON	27.84	3.49	0.22	1.80	0.20
HENRY	21.78	3.21	0.17	1.32	0.31
HOWARD	4.60	0.55	0.03	0.32	0.05
HUMBOLDT	12.01	1.93	0.07	0.53	0.14
IDA	6.29	0.84	0.05	0.50	0.07
IOWA	42.55	6.66	0.42	2.93	0.66
JACKSON	31.23	4.21	0.23	2.20	0.65
JASPER	73.21	9.43	0.54	4.17	0.91
JEFFERSON	40.39	6.13	0.37	2.36	0.34
JOHNSON	388.62	60.57	3.69	22.35	6.22
JONES	21.42	2.10	0.11	1.53	0.15
KEOKUK	4.73	0.44	0.02	0.32	0.05

Table A: Alphabetical by County, 2015

2015 Domestic Travel Impact on Iowa						
Table A: Alphabetical by County, 2015 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
KOSSUTH	17.07	1.81	0.11	1.16	0.12	
LEE	61.14	9.20	0.52	3.93	0.88	
LINN	771.92	133.22	6.29	39.92	11.80	
LOUISA	13.69	1.71	0.09	1.16	0.34	
LUCAS	7.65	0.87	0.05	0.49	0.08	
LYON	6.46	0.63	0.03	0.47	0.06	
MADISON	13.66	1.20	0.06	0.94	0.13	
MAHASKA	18.90	3.74	0.20	1.76	0.29	
MARION	50.69	6.38	0.36	3.16	0.42	
MARSHALL	86.66	12.89	0.69	5.20	1.14	
MILLS	8.12	0.95	0.06	0.74	0.08	
MITCHELL	10.68	1.10	0.06	0.65	0.10	
MONONA	19.16	3.09	0.16	1.20	0.24	
MONROE	8.32	1.47	0.09	0.74	0.10	
MONTGOMERY	20.82	3.66	0.22	1.80	0.23	
MUSCATINE	79.99	12.15	0.70	5.37	0.99	
O'BRIEN	22.23	2.78	0.16	1.49	0.17	
OSCEOLA	3.52	0.43	0.03	0.24	0.03	
PAGE	17.86	1.77	0.10	1.18	0.17	
PALO ALTO	33.52	4.77	0.26	2.44	0.65	
PLYMOUTH	24.48	2.83	0.15	1.72	0.18	
POCAHONTAS	4.41	0.49	0.03	0.31	0.05	
POLK	1,898.08	342.30	16.55	99.91	31.16	
POTTAWATTAMIE	305.03	54.97	3.20	21.02	4.70	
POWESHIEK	47.55	5.93	0.31	3.27	0.94	
RINGGOLD	10.42	0.98	0.04	0.77	0.20	
SAC	15.44	1.49	0.08	1.04	0.31	

Table A: Alphabetical by County, 2015

2015 Domestic Travel Impact on Iowa						
Table A: Alphabetical by County, 2015 (Continued)						
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	
SCOTT	624.07	99.53	6.20	39.52	9.83	
SHELBY	14.50	1.64	0.09	0.96	0.13	
SIOUX	36.38	4.65	0.25	2.43	0.27	
STORY	202.05	29.22	1.64	11.19	2.67	
TAMA	20.47	3.20	0.18	1.31	0.22	
TAYLOR	3.30	0.31	0.02	0.29	0.03	
UNION	14.94	2.05	0.12	1.16	0.17	
VAN BUREN	6.52	0.85	0.05	0.52	0.08	
WAPELLO	85.37	11.40	0.64	5.54	1.11	
WARREN	36.97	3.42	0.20	2.31	0.30	
WASHINGTON	15.89	1.82	0.11	1.08	0.12	
WAYNE	7.03	0.85	0.05	0.63	0.10	
WEBSTER	65.73	10.77	0.57	4.13	0.62	
WINNEBAGO	11.38	1.02	0.06	0.79	0.09	
WINNESHIEK	29.77	5.30	0.34	2.15	0.30	
WOODBURY	285.18	49.36	2.26	13.80	4.17	
WORTH	6.58	0.49	0.03	0.41	0.04	
<u>WRIGHT</u>	<u>17.44</u>	<u>1.88</u>	<u>0.09</u>	<u>1.12</u>	<u>0.27</u>	
STATE TOTALS	\$8,064.13	\$1,278.04	67.41	\$466.74	\$116.89	

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Table B: Ranking of Counties by Expenditure Levels, 2015

2015 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2015					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
POLK	\$1,898.08	\$342.30	16.55	\$99.91	\$31.16
LINN	771.92	133.22	6.29	39.92	11.80
SCOTT	624.07	99.53	6.20	39.52	9.83
JOHNSON	388.62	60.57	3.69	22.35	6.22
BLACK HAWK	351.69	56.58	2.88	18.16	4.81
DUBUQUE	329.27	52.59	2.87	18.35	4.49
POTTAWATTAMIE	305.03	54.97	3.20	21.02	4.70
WOODBURY	285.18	49.36	2.26	13.80	4.17
DICKINSON	276.12	33.90	1.98	17.69	4.99
STORY	202.05	29.22	1.64	11.19	2.67
CERRO GORDO	191.09	26.10	1.50	10.91	3.30
DALLAS	185.81	29.62	1.79	11.09	1.64
DES MOINES	132.62	23.60	1.05	6.55	1.92
CLINTON	116.28	16.67	0.97	7.00	1.52
CLAY	103.94	22.41	0.73	2.94	1.34
MARSHALL	86.66	12.89	0.69	5.20	1.14
WAPELLO	85.37	11.40	0.64	5.54	1.11
MUSCATINE	79.99	12.15	0.70	5.37	0.99
JASPER	73.21	9.43	0.54	4.17	0.91
WEBSTER	65.73	10.77	0.57	4.13	0.62
LEE	61.14	9.20	0.52	3.93	0.88
CARROLL	56.55	7.30	0.44	3.47	0.43
BREMER	53.96	6.88	0.45	3.20	0.39
MARION	50.69	6.38	0.36	3.16	0.42
POWESHIEK	47.55	5.93	0.31	3.27	0.94
IOWA	42.55	6.66	0.42	2.93	0.66
JEFFERSON	40.39	6.13	0.37	2.36	0.34

Table B: Ranking of Counties by Expenditure Levels, 2015

2015 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2015 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
ALLAMAKEE	40.21	3.91	0.20	2.42	0.98	
WARREN	36.97	3.42	0.20	2.31	0.30	
SIOUX	36.38	4.65	0.25	2.43	0.27	
PALO ALTO	33.52	4.77	0.26	2.44	0.65	
CLAYTON	33.47	4.47	0.25	2.13	0.66	
JACKSON	31.23	4.21	0.23	2.20	0.65	
WINNESHIEK	29.77	5.30	0.34	2.15	0.30	
BUENA VISTA	29.13	3.71	0.20	1.77	0.27	
HARRISON	27.84	3.49	0.22	1.80	0.20	
BUCHANAN	26.75	2.59	0.13	1.82	0.30	
CASS	26.33	2.85	0.16	1.70	0.18	
BOONE	25.98	3.02	0.16	1.86	0.21	
CLARKE	25.13	2.95	0.18	1.60	0.21	
PLYMOUTH	24.48	2.83	0.15	1.72	0.18	
HAMILTON	23.94	3.05	0.18	1.51	0.19	
HARDIN	22.31	2.12	0.10	1.20	0.16	
O'BRIEN	22.23	2.78	0.16	1.49	0.17	
CEDAR	22.14	2.50	0.13	1.67	0.29	
HENRY	21.78	3.21	0.17	1.32	0.31	
JONES	21.42	2.10	0.11	1.53	0.15	
CRAWFORD	20.95	3.30	0.18	1.55	0.19	
MONTGOMERY	20.82	3.66	0.22	1.80	0.23	
TAMA	20.47	3.20	0.18	1.31	0.22	
MONONA	19.16	3.09	0.16	1.20	0.24	
MAHASKA	18.90	3.74	0.20	1.76	0.29	
BENTON	18.30	1.71	0.10	1.42	0.12	
FLOYD	18.19	2.74	0.12	1.11	0.17	

Table B: Ranking of Counties by Expenditure Levels, 2015

2015 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2015 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
PAGE	17.86	1.77	0.10	1.18	0.17	
WRIGHT	17.44	1.88	0.09	1.12	0.27	
APPANOOSE	17.39	2.09	0.11	1.15	0.24	
KOSSUTH	17.07	1.81	0.11	1.16	0.12	
FAYETTE	16.95	1.75	0.09	1.09	0.14	
ADAIR	16.18	1.53	0.09	0.77	0.11	
WASHINGTON	15.89	1.82	0.11	1.08	0.12	
SAC	15.44	1.49	0.08	1.04	0.31	
UNION	14.94	2.05	0.12	1.16	0.17	
FREMONT	14.90	2.03	0.12	0.96	0.14	
CHEROKEE	14.65	2.17	0.12	1.22	0.13	
SHELBY	14.50	1.64	0.09	0.96	0.13	
LOUISA	13.69	1.71	0.09	1.16	0.34	
MADISON	13.66	1.20	0.06	0.94	0.13	
GUTHRIE	12.81	1.86	0.09	1.25	0.32	
DECATUR	12.66	1.05	0.06	0.71	0.11	
HUMBOLDT	12.01	1.93	0.07	0.53	0.14	
FRANKLIN	11.70	1.25	0.07	0.82	0.07	
WINNEBAGO	11.38	1.02	0.06	0.79	0.09	
EMMET	11.09	1.44	0.07	0.77	0.13	
MITCHELL	10.68	1.10	0.06	0.65	0.10	
RINGGOLD	10.42	0.98	0.04	0.77	0.20	
CHICKASAW	10.36	1.59	0.10	0.79	0.12	
CALHOUN	10.30	1.20	0.06	0.78	0.26	
BUTLER	8.59	0.69	0.03	0.65	0.05	
DELAWARE	8.58	0.90	0.05	0.58	0.09	
MONROE	8.32	1.47	0.09	0.74	0.10	

Table B: Ranking of Counties by Expenditure Levels, 2015

2015 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2015 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
MILLS	8.12	0.95	0.06	0.74	0.08	
LUCAS	7.65	0.87	0.05	0.49	0.08	
WAYNE	7.03	0.85	0.05	0.63	0.10	
DAVIS	6.86	0.66	0.04	0.44	0.08	
WORTH	6.58	0.49	0.03	0.41	0.04	
VAN BUREN	6.52	0.85	0.05	0.52	0.08	
LYON	6.46	0.63	0.03	0.47	0.06	
GREENE	6.32	0.69	0.03	0.44	0.08	
IDA	6.29	0.84	0.05	0.50	0.07	
HANCOCK	6.16	0.90	0.04	0.44	0.10	
GRUNDY	5.15	0.72	0.04	0.44	0.05	
AUDUBON	5.04	0.53	0.02	0.41	0.05	
KEOKUK	4.73	0.44	0.02	0.32	0.05	
HOWARD	4.60	0.55	0.03	0.32	0.05	
POCAHONTAS	4.41	0.49	0.03	0.31	0.05	
OSCEOLA	3.52	0.43	0.03	0.24	0.03	
TAYLOR	3.30	0.31	0.02	0.29	0.03	
<u>ADAMS</u>	<u>2.64</u>	<u>0.30</u>	<u>0.02</u>	<u>0.20</u>	<u>0.03</u>	
STATE TOTALS	\$8,064.13	\$1,278.04	67.41	\$466.74	\$116.89	

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Table C: Percent Distribution by County, 2015

2015 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2015					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	0.20%	0.12%	0.14%	0.17%	0.10%
ADAMS	0.03%	0.02%	0.03%	0.04%	0.03%
ALLAMAKEE	0.50%	0.31%	0.30%	0.52%	0.84%
APPANOOSE	0.22%	0.16%	0.17%	0.25%	0.20%
AUDUBON	0.06%	0.04%	0.03%	0.09%	0.04%
BENTON	0.23%	0.13%	0.14%	0.30%	0.10%
BLACK HAWK	4.36%	4.43%	4.27%	3.89%	4.11%
BOONE	0.32%	0.24%	0.24%	0.40%	0.18%
BREMER	0.67%	0.54%	0.66%	0.69%	0.33%
BUCHANAN	0.33%	0.20%	0.20%	0.39%	0.25%
BUENA VISTA	0.36%	0.29%	0.30%	0.38%	0.23%
BUTLER	0.11%	0.05%	0.05%	0.14%	0.04%
CALHOUN	0.13%	0.09%	0.09%	0.17%	0.23%
CARROLL	0.70%	0.57%	0.65%	0.74%	0.36%
CASS	0.33%	0.22%	0.23%	0.36%	0.16%
CEDAR	0.27%	0.20%	0.20%	0.36%	0.25%
CERRO GORDO	2.37%	2.04%	2.23%	2.34%	2.82%
CHEROKEE	0.18%	0.17%	0.18%	0.26%	0.11%
CHICKASAW	0.13%	0.12%	0.14%	0.17%	0.10%
CLARKE	0.31%	0.23%	0.27%	0.34%	0.18%
CLAY	1.29%	1.75%	1.09%	0.63%	1.15%
CLAYTON	0.42%	0.35%	0.37%	0.46%	0.57%
CLINTON	1.44%	1.30%	1.44%	1.50%	1.30%
CRAWFORD	0.26%	0.26%	0.27%	0.33%	0.16%
DALLAS	2.30%	2.32%	2.66%	2.38%	1.40%
DAVIS	0.09%	0.05%	0.05%	0.09%	0.07%
DECATUR	0.16%	0.08%	0.09%	0.15%	0.10%

Table C: Percent Distribution by County, 2015

2015 Domestic Travel Impact on Iowa Table C: Percent Distribution by County, 2015 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	0.11%	0.07%	0.07%	0.12%	0.08%
DES MOINES	1.64%	1.85%	1.55%	1.40%	1.64%
DICKINSON	3.42%	2.65%	2.93%	3.79%	4.27%
DUBUQUE	4.08%	4.12%	4.26%	3.93%	3.84%
EMMET	0.14%	0.11%	0.10%	0.16%	0.11%
FAYETTE	0.21%	0.14%	0.13%	0.23%	0.12%
FLOYD	0.23%	0.21%	0.17%	0.24%	0.15%
FRANKLIN	0.15%	0.10%	0.10%	0.18%	0.06%
FREMONT	0.18%	0.16%	0.17%	0.20%	0.12%
GREENE	0.08%	0.05%	0.05%	0.09%	0.07%
GRUNDY	0.06%	0.06%	0.06%	0.09%	0.04%
GUTHRIE	0.16%	0.15%	0.14%	0.27%	0.27%
HAMILTON	0.30%	0.24%	0.27%	0.32%	0.17%
HANCOCK	0.08%	0.07%	0.05%	0.10%	0.08%
HARDIN	0.28%	0.17%	0.15%	0.26%	0.13%
HARRISON	0.35%	0.27%	0.33%	0.39%	0.17%
HENRY	0.27%	0.25%	0.25%	0.28%	0.26%
HOWARD	0.06%	0.04%	0.05%	0.07%	0.04%
HUMBOLDT	0.15%	0.15%	0.11%	0.11%	0.12%
IDA	0.08%	0.07%	0.08%	0.11%	0.06%
IOWA	0.53%	0.52%	0.62%	0.63%	0.56%
JACKSON	0.39%	0.33%	0.34%	0.47%	0.56%
JASPER	0.91%	0.74%	0.80%	0.89%	0.78%
JEFFERSON	0.50%	0.48%	0.55%	0.51%	0.29%
JOHNSON	4.82%	4.74%	5.47%	4.79%	5.32%
JONES	0.27%	0.16%	0.16%	0.33%	0.13%
KEOKUK	0.06%	0.03%	0.03%	0.07%	0.04%

Table C: Percent Distribution by County, 2015

2015 Domestic Travel Impact on Iowa Table C: Percent Distribution by County, 2015 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	0.21%	0.14%	0.16%	0.25%	0.10%
LEE	0.76%	0.72%	0.77%	0.84%	0.75%
LINN	9.57%	10.42%	9.34%	8.55%	10.09%
LOUISA	0.17%	0.13%	0.14%	0.25%	0.29%
LUCAS	0.09%	0.07%	0.07%	0.11%	0.07%
LYON	0.08%	0.05%	0.05%	0.10%	0.05%
MADISON	0.17%	0.09%	0.09%	0.20%	0.11%
MAHASKA	0.23%	0.29%	0.30%	0.38%	0.25%
MARION	0.63%	0.50%	0.54%	0.68%	0.36%
MARSHALL	1.07%	1.01%	1.03%	1.11%	0.97%
MILLS	0.10%	0.07%	0.09%	0.16%	0.06%
MITCHELL	0.13%	0.09%	0.09%	0.14%	0.08%
MONONA	0.24%	0.24%	0.24%	0.26%	0.21%
MONROE	0.10%	0.12%	0.14%	0.16%	0.09%
MONTGOMERY	0.26%	0.29%	0.33%	0.39%	0.19%
MUSCATINE	0.99%	0.95%	1.04%	1.15%	0.85%
O'BRIEN	0.28%	0.22%	0.23%	0.32%	0.14%
OSCEOLA	0.04%	0.03%	0.04%	0.05%	0.03%
PAGE	0.22%	0.14%	0.15%	0.25%	0.15%
PALO ALTO	0.42%	0.37%	0.38%	0.52%	0.56%
PLYMOUTH	0.30%	0.22%	0.23%	0.37%	0.15%
POCAHONTAS	0.05%	0.04%	0.04%	0.07%	0.04%
POLK	23.54%	26.78%	24.56%	21.41%	26.66%
POTTAWATTAMIE	3.78%	4.30%	4.75%	4.50%	4.03%
POWESHIEK	0.59%	0.46%	0.46%	0.70%	0.80%
RINGGOLD	0.13%	0.08%	0.07%	0.16%	0.17%
SAC	0.19%	0.12%	0.11%	0.22%	0.26%

Table C: Percent Distribution by County, 2015

2015 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2015 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	7.74%	7.79%	9.20%	8.47%	8.41%
SHELBY	0.18%	0.13%	0.13%	0.21%	0.11%
SIOUX	0.45%	0.36%	0.37%	0.52%	0.23%
STORY	2.51%	2.29%	2.44%	2.40%	2.28%
TAMA	0.25%	0.25%	0.27%	0.28%	0.19%
TAYLOR	0.04%	0.02%	0.03%	0.06%	0.03%
UNION	0.19%	0.16%	0.18%	0.25%	0.14%
VAN BUREN	0.08%	0.07%	0.07%	0.11%	0.07%
WAPELLO	1.06%	0.89%	0.95%	1.19%	0.95%
WARREN	0.46%	0.27%	0.29%	0.50%	0.26%
WASHINGTON	0.20%	0.14%	0.16%	0.23%	0.10%
WAYNE	0.09%	0.07%	0.08%	0.13%	0.09%
WEBSTER	0.82%	0.84%	0.84%	0.88%	0.53%
WINNEBAGO	0.14%	0.08%	0.09%	0.17%	0.07%
WINNESHIEK	0.37%	0.41%	0.50%	0.46%	0.25%
WOODBURY	3.54%	3.86%	3.35%	2.96%	3.57%
WORTH	0.08%	0.04%	0.04%	0.09%	0.03%
<u>WRIGHT</u>	<u>0.22%</u>	<u>0.15%</u>	<u>0.13%</u>	<u>0.24%</u>	<u>0.23%</u>
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2014

2015 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2014					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	0.37%	4.28%	1.68%	25.02%	5.27%
ADAMS	-4.11%	-0.37%	-2.86%	19.44%	0.57%
ALLAMAKEE	0.21%	4.12%	1.52%	24.82%	5.10%
APPANOOSE	0.39%	4.30%	1.70%	25.04%	5.29%
AUDUBON	-1.99%	1.84%	-0.71%	22.08%	2.80%
BENTON	-4.01%	-0.26%	-2.75%	19.57%	0.68%
BLACK HAWK	0.19%	4.10%	1.50%	24.80%	5.08%
BOONE	0.19%	4.10%	1.50%	24.79%	5.08%
BREMER	0.35%	4.26%	1.66%	24.99%	5.25%
BUCHANAN	-1.48%	2.37%	-0.19%	22.72%	3.33%
BUENA VISTA	-2.66%	1.14%	-1.39%	21.25%	2.10%
BUTLER	-5.10%	-1.40%	-3.86%	18.20%	-0.47%
CALHOUN	-4.08%	-0.34%	-2.83%	19.48%	0.60%
CARROLL	0.59%	4.51%	1.90%	25.29%	5.50%
CASS	-2.22%	1.59%	-0.95%	21.79%	2.55%
CEDAR	-4.94%	-0.75%	-3.32%	18.41%	-0.30%
CERRO GORDO	-0.15%	3.75%	1.15%	24.37%	4.73%
CHEROKEE	-4.82%	-1.11%	-3.58%	18.56%	-0.17%
CHICKASAW	0.24%	4.15%	1.55%	24.86%	5.14%
CLARKE	0.46%	4.37%	1.77%	25.12%	5.36%
CLAY	1.14%	5.08%	2.46%	25.97%	6.07%
CLAYTON	0.67%	4.60%	1.99%	25.40%	5.59%
CLINTON	-0.89%	2.97%	0.40%	23.44%	3.94%
CRAWFORD	0.63%	4.56%	1.95%	25.35%	5.55%
DALLAS	0.29%	4.21%	1.60%	24.92%	5.19%
DAVIS	0.47%	4.39%	1.78%	25.14%	5.38%
DECATUR	-3.95%	-0.21%	-2.70%	19.63%	0.73%

Table D: Percent Change over 2014

**2015 Domestic Travel Impact on Iowa
Table D: Percent Change over 2014 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	-4.72%	-1.00%	-3.47%	18.68%	-0.06%
DES MOINES	0.47%	4.39%	1.78%	25.15%	5.38%
DICKINSON	0.23%	4.14%	1.54%	24.85%	5.12%
DUBUQUE	0.08%	3.98%	1.38%	24.65%	4.96%
EMMET	-5.43%	-1.75%	-4.20%	17.79%	-0.82%
FAYETTE	-4.35%	-0.62%	-3.10%	19.14%	0.32%
FLOYD	-0.72%	3.15%	0.58%	23.66%	4.13%
FRANKLIN	-4.06%	-0.31%	-2.81%	19.50%	0.63%
FREMONT	-0.96%	2.91%	0.33%	23.36%	3.88%
GREENE	0.18%	4.08%	1.48%	24.78%	5.07%
GRUNDY	-2.18%	1.64%	-0.90%	21.84%	2.60%
GUTHRIE	-4.00%	-0.26%	-2.75%	19.57%	0.68%
HAMILTON	-3.47%	0.30%	-2.21%	20.24%	1.24%
HANCOCK	-1.88%	1.95%	-0.60%	22.22%	2.91%
HARDIN	0.30%	4.22%	1.61%	24.93%	5.20%
HARRISON	-0.29%	3.60%	1.01%	24.20%	4.58%
HENRY	0.93%	4.87%	2.25%	25.72%	5.86%
HOWARD	-1.63%	2.21%	-0.35%	22.53%	3.17%
HUMBOLDT	-2.86%	0.93%	-1.59%	21.00%	1.89%
IDA	-1.13%	2.73%	0.16%	23.15%	3.70%
IOWA	-0.78%	3.09%	0.52%	23.59%	4.07%
JACKSON	0.26%	4.17%	1.57%	24.88%	5.16%
JASPER	0.57%	4.49%	1.88%	25.27%	5.48%
JEFFERSON	-0.54%	3.34%	0.76%	23.88%	4.31%
JOHNSON	0.42%	4.34%	1.73%	25.08%	5.32%
JONES	-0.48%	3.40%	0.81%	23.95%	4.37%
KEOKUK	-4.33%	-0.60%	-3.09%	19.16%	0.34%

Table D: Percent Change over 2014

**2015 Domestic Travel Impact on Iowa
Table D: Percent Change over 2014 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	0.27%	4.18%	1.57%	24.89%	5.16%
LEE	0.35%	4.26%	1.65%	24.99%	5.24%
LINN	0.21%	4.11%	1.51%	24.81%	5.10%
LOUISA	-3.84%	-0.09%	-2.59%	19.77%	0.85%
LUCAS	-0.55%	3.33%	0.75%	23.87%	4.30%
LYON	-1.49%	2.36%	-0.20%	22.71%	3.32%
MADISON	0.36%	4.28%	1.67%	25.01%	5.26%
MAHASKA	-4.51%	-0.78%	-3.26%	18.94%	0.15%
MARION	0.35%	4.26%	1.66%	24.99%	5.25%
MARSHALL	0.41%	4.32%	1.72%	25.06%	5.31%
MILLS	0.32%	4.24%	1.63%	24.96%	5.22%
MITCHELL	-2.53%	1.27%	-1.26%	21.41%	2.23%
MONONA	-4.08%	-0.33%	-2.82%	19.48%	0.61%
MONROE	-1.30%	2.55%	-0.01%	22.94%	3.52%
MONTGOMERY	0.21%	4.11%	1.51%	24.81%	5.10%
MUSCATINE	-0.32%	3.56%	0.98%	24.15%	4.54%
O'BRIEN	0.42%	4.34%	1.73%	25.09%	5.33%
OSCEOLA	0.25%	4.16%	1.56%	24.87%	5.14%
PAGE	-0.17%	3.72%	1.13%	24.34%	4.70%
PALO ALTO	-0.91%	2.95%	0.38%	23.42%	3.92%
PLYMOUTH	0.55%	4.48%	1.86%	25.25%	5.46%
POCAHONTAS	-3.19%	0.59%	-1.93%	20.58%	1.54%
POLK	0.39%	4.31%	1.70%	25.04%	5.29%
POTTAWATTAMIE	0.08%	3.98%	1.39%	24.66%	4.97%
POWESHIEK	0.21%	4.12%	1.52%	24.82%	5.10%
RINGGOLD	0.66%	4.59%	1.97%	25.38%	5.57%
SAC	0.50%	4.42%	1.81%	25.18%	5.40%

Table D: Percent Change over 2014

2015 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2014 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	0.39%	4.30%	1.69%	25.04%	5.29%
SHELBY	-0.61%	3.27%	0.69%	23.80%	4.24%
SIOUX	0.93%	4.86%	2.24%	25.71%	5.85%
STORY	0.10%	4.01%	1.41%	24.68%	4.99%
TAMA	0.36%	4.28%	1.67%	25.01%	5.26%
TAYLOR	-4.42%	-0.69%	-3.17%	19.05%	0.25%
UNION	-3.61%	0.15%	-2.35%	20.06%	1.10%
VAN BUREN	0.46%	4.38%	1.77%	25.13%	5.37%
WAPELLO	0.19%	4.10%	1.50%	24.79%	5.08%
WARREN	0.30%	4.21%	1.61%	24.93%	5.19%
WASHINGTON	-2.24%	1.57%	-0.97%	21.76%	2.53%
WAYNE	0.73%	4.66%	2.04%	25.47%	5.65%
WEBSTER	0.70%	4.63%	2.01%	25.43%	5.61%
WINNEBAGO	-5.08%	-1.38%	-3.85%	18.23%	-0.45%
WINNESHIEK	0.84%	4.77%	2.15%	25.60%	5.76%
WOODBURY	0.48%	4.40%	1.79%	25.16%	5.39%
WORTH	-0.85%	3.02%	0.45%	23.50%	3.99%
<u>WRIGHT</u>	<u>-1.81%</u>	<u>2.02%</u>	<u>-0.53%</u>	<u>22.30%</u>	<u>2.98%</u>
STATE TOTALS	0.06%	4.03%	1.41%	24.55%	4.99%

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Table E: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2014					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
ADAIR	\$16.12	\$1.47	0.09	\$0.62	\$0.11
ADAMS	2.75	0.30	0.02	0.16	0.03
ALLAMAKEE	40.12	3.76	0.20	1.94	0.94
APPANOOSE	17.32	2.00	0.11	0.92	0.22
AUDUBON	5.14	0.52	0.02	0.33	0.05
BENTON	19.06	1.72	0.10	1.18	0.12
BLACK HAWK	351.01	54.35	2.84	14.55	4.58
BOONE	25.93	2.90	0.16	1.49	0.20
BREMER	53.77	6.60	0.44	2.56	0.37
BUCHANAN	27.15	2.53	0.13	1.48	0.29
BUENA VISTA	29.92	3.66	0.20	1.46	0.26
BUTLER	9.05	0.70	0.03	0.55	0.05
CALHOUN	10.73	1.21	0.06	0.65	0.26
CARROLL	56.22	6.99	0.43	2.77	0.40
CASS	26.93	2.81	0.16	1.40	0.18
CEDAR	23.29	2.52	0.14	1.41	0.29
CERRO GORDO	191.37	25.15	1.48	8.77	3.15
CHEROKEE	15.40	2.19	0.13	1.03	0.13
CHICKASAW	10.34	1.52	0.10	0.63	0.11
CLARKE	25.01	2.83	0.18	1.28	0.20
CLAY	102.77	21.32	0.72	2.33	1.27
CLAYTON	33.25	4.27	0.24	1.69	0.63
CLINTON	117.33	16.19	0.97	5.67	1.46
CRAWFORD	20.81	3.16	0.18	1.24	0.18
DALLAS	185.27	28.42	1.76	8.87	1.56
DAVIS	6.83	0.63	0.04	0.35	0.08
DECATUR	13.18	1.05	0.06	0.59	0.11

Table E: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2014 (Continued)					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
DELAWARE	9.01	0.91	0.05	0.49	0.09
DES MOINES	131.99	22.60	1.03	5.23	1.82
DICKINSON	275.48	32.55	1.95	14.17	4.75
DUBUQUE	329.01	50.58	2.83	14.72	4.28
EMMET	11.72	1.46	0.07	0.65	0.13
FAYETTE	17.72	1.76	0.09	0.92	0.14
FLOYD	18.32	2.66	0.12	0.90	0.16
FRANKLIN	12.19	1.25	0.07	0.69	0.07
FREMONT	15.04	1.97	0.12	0.77	0.13
GREENE	6.31	0.66	0.03	0.35	0.07
GRUNDY	5.26	0.71	0.04	0.36	0.05
GUTHRIE	13.34	1.86	0.10	1.05	0.32
HAMILTON	24.80	3.04	0.18	1.26	0.19
HANCOCK	6.28	0.88	0.04	0.36	0.10
HARDIN	22.24	2.03	0.10	0.96	0.15
HARRISON	27.92	3.37	0.22	1.45	0.19
HENRY	21.58	3.07	0.17	1.05	0.29
HOWARD	4.67	0.53	0.03	0.26	0.05
HUMBOLDT	12.36	1.91	0.07	0.44	0.14
IDA	6.36	0.81	0.05	0.41	0.07
IOWA	42.88	6.46	0.42	2.37	0.63
JACKSON	31.15	4.05	0.23	1.76	0.62
JASPER	72.80	9.03	0.53	3.33	0.86
JEFFERSON	40.61	5.93	0.37	1.91	0.32
JOHNSON	386.99	58.05	3.62	17.87	5.91
JONES	21.52	2.03	0.11	1.24	0.14
KEOKUK	4.95	0.44	0.02	0.27	0.05

Table E: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa						
Table E: Alphabetical by County, 2014 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
KOSSUTH	17.02	1.73	0.10	0.92	0.11	
LEE	60.93	8.82	0.51	3.14	0.84	
LINN	770.33	127.96	6.20	31.99	11.23	
LOUISA	14.23	1.72	0.10	0.97	0.34	
LUCAS	7.69	0.84	0.05	0.40	0.08	
LYON	6.56	0.62	0.03	0.39	0.05	
MADISON	13.61	1.15	0.06	0.75	0.12	
MAHASKA	19.79	3.77	0.21	1.48	0.29	
MARION	50.51	6.12	0.35	2.53	0.40	
MARSHALL	86.31	12.36	0.68	4.16	1.08	
MILLS	8.09	0.92	0.06	0.59	0.07	
MITCHELL	10.95	1.09	0.06	0.54	0.10	
MONONA	19.98	3.10	0.17	1.01	0.24	
MONROE	8.43	1.43	0.09	0.60	0.10	
MONTGOMERY	20.77	3.52	0.22	1.44	0.21	
MUSCATINE	80.25	11.73	0.70	4.33	0.95	
O'BRIEN	22.14	2.67	0.15	1.19	0.16	
OSCEOLA	3.51	0.41	0.03	0.19	0.03	
PAGE	17.89	1.70	0.10	0.95	0.16	
PALO ALTO	33.83	4.63	0.25	1.98	0.63	
PLYMOUTH	24.35	2.71	0.15	1.38	0.17	
POCAHONTAS	4.56	0.49	0.03	0.25	0.05	
POLK	1,890.67	328.17	16.28	79.90	29.60	
POTTAWATTAMIE	304.79	52.86	3.16	16.86	4.48	
POWESHIEK	47.45	5.70	0.30	2.62	0.89	
RINGGOLD	10.35	0.93	0.04	0.61	0.19	
SAC	15.36	1.42	0.07	0.83	0.29	

Table E: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa						
Table E: Alphabetical by County, 2014 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
SCOTT	621.67	95.42	6.10	31.61	9.34	
SHELBY	14.58	1.59	0.09	0.78	0.13	
SIOUX	36.04	4.43	0.24	1.93	0.25	
STORY	201.84	28.09	1.62	8.97	2.54	
TAMA	20.40	3.06	0.18	1.05	0.21	
TAYLOR	3.45	0.32	0.02	0.24	0.03	
UNION	15.50	2.05	0.12	0.97	0.16	
VAN BUREN	6.49	0.82	0.05	0.41	0.08	
WAPELLO	85.21	10.95	0.63	4.44	1.06	
WARREN	36.86	3.28	0.19	1.85	0.29	
WASHINGTON	16.25	1.79	0.11	0.89	0.11	
WAYNE	6.98	0.82	0.05	0.50	0.10	
WEBSTER	65.27	10.29	0.55	3.29	0.59	
WINNEBAGO	11.99	1.03	0.06	0.67	0.09	
WINNESHIEK	29.52	5.06	0.33	1.71	0.28	
WOODBURY	283.82	47.28	2.22	11.02	3.96	
WORTH	6.64	0.48	0.03	0.33	0.04	
<u>WRIGHT</u>	<u>17.77</u>	<u>1.84</u>	<u>0.09</u>	<u>0.92</u>	<u>0.27</u>	
STATE TOTALS	\$8,059.21	\$1,228.57	66.47	\$374.73	\$111.33	

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APPENDICES

Appendix A: Travel Economic Impact Model

Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at U.S. Travel Association 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 comprised of a variety of travel categories (described in Appendix B: Glossary of Terms). The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

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 County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

Definition of Terms

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 and day trips to places 50 miles away or more, one way, from the traveler's origin and any overnight trips away from home in paid accommodations.

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 that limits tourism to personal or pleasure travel.

The *travel industry*, as used herein, refers to the collection of 18 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Glossary of Terms). With the exception of Amtrak and second home ownership and rental, these business types are defined by the Office of Management and Budget in the 1997 North American Industry Classification System (NAICS) and well as in its predecessor, the 1987 Standard Industrial Classification System (SIC). In each case, the relevant NAICS and SIC codes are included.

Travel *expenditure* is assumed to take place whenever traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into related categories representing traveler purchases of goods and services at the retail level. One category, travel agents, receives no travel expenditures as these purchases are allocated to the category (i.e. air transportation) actually providing the final good or service to the traveler. Travel expenditures are allocated among states by simulating where the exchange of money for goods or service actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his/her 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 in the quinquennial Census of Service Industries.

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. *Tax*

revenues include corporate income, individual income, sales and gross receipts, and excise taxes by level of government. *Business receipts* reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

Description of the Model

Estimates of Travel Expenditures

Total travel expenditures includes spending by travelers on goods and services during their trips, such as lodging, transportation, meals, entertainment, retail shopping. Eighteen (18) categories of activities are covered in the TEIM. 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 18 categories of travel related goods and services by state. For example, the number of nights spent by travel parties in hotels in Iowa is multiplied by the average cost per night per travel party of staying in a hotel in the state to obtain the estimate of traveler expenditures for hotel accommodations. The estimates derived through the cost factor method are also validated through three additional methods: Household travel spending ratio method - the ratio of out of town spending to total household spending; Trip expenditure ratio method – the ratio of each travel spending category in a trip to that trip’s total expenditures; and economic and business statistics validations.

The data on domestic travel activity levels (e.g., number of miles traveled by mode of transportation, the number of nights spent away from home by type of accommodation) are based on national travel surveys conducted by U.S. Travel Association, The Bureau of Labor Statistics’ Survey of Consumer Expenditures, Smith Travel Research’s Hotel and Motel Survey, etc. Average cost data are purchased and collected from different organizations and government agencies. Total sales and revenue and other data collected from state, local and federal government and other organizations are employed to compare, adjust and update the spending database of TEIM, as well as linking spending to other impact components.

The international travel expenditure estimates are based on Tourism Industries’ (OTTI) Survey of International Air Travelers and data provided to OTTI from Canada and Mexico. Other estimates of the economic impact of international visitors to the U.S. are generated by TEIM by incorporating the estimated international traveler expenditures with the data series utilized to produce the domestic estimates.

Estimates of Business Receipts, Payroll and Employment

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 18 travel categories are associated with a type of travel related business. 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; NAICS 7211) 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 the state 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 total sales, payroll and employment data of each travel related industry (by SIC and NAICS) are provided by and collected from state, local and federal government, such as the Bureau of Labor Statistics, the Bureau of Economic Analysis, Census Bureau and The Bureau of Transportation Statistics.

Estimates of Tax Revenues

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 are then applied to the appropriate primary level output to obtain estimates of tax receipts generated by travel. For example, the ratio of Iowa 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 Iowa.

Estimates for Counties and Local Areas

Local area travel impact estimates are derived by distributing the state estimates to the area using proper proportions of each related category in the area. The proportions of a local area are calculated based on a set of data collected from federal, state and local governments and private organizations. The data can be gathered at the zip code level. Consumer survey data are not used in locality impact estimates due to small sample size issue.

The data used to estimate the local area shares includes sales, employment, payroll and taxes for all travel-related industry categories. Local data provided by states such as sales/tax receipts, employment and wages, attraction attendances, etc. are critical inputs. County and local sales, establishments, employment and payroll data derived from Economic Census, County Business Patterns and the Quarterly Census of Employment and Wages (QCEW) are also used in the model.

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 various reasons. 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.). The magnitude of these purchases in preparation for a trip cannot be quantified due to lack of sound, relevant data.

The second type of spending not covered due to lack of sufficient data is the purchase of major consumer durables generally related to outdoor recreation on trips. Further research is required in this area to determine to what extent pre-trip spending on consumer durable products can justifiably be included within a travel economic impact study.

Appendix B: Glossary of Terms – TEIM

Automobile Transportation Expenditure. This category includes a prorated 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.

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.

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

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.

Lodging Expenditure. Traveler spending on hotels and motels, B&Bs, campgrounds and trailer parks, rental of vacation homes and other types of lodging.

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 TravelScope.

Travel-generated Tax Receipts. Those 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.

Appendix C: Travel Related Industry by NAICS

Travel industry categories: With the transition to NAICS, the U.S. Travel Association has adjusted its selection of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, U.S. Travel Association's Travel Economic Impact Model tracks business activity in seven (7) major travel-related industry groups. The industry groups and subcategories used in the model are outlined below, followed by a detailed table of NAICS Codes. The share of travel in each of listed industries will depend on travel spending estimates for the related categories and are different from industries and areas.

Automobile Transportation: Gasoline service stations, passenger car rental, motor vehicle/parts dealers, automotive repairs and maintenance.

Entertainment/Recreation industry: Entertainment, art and recreation industry.

Foodservice industry: Eating & drinking places, and grocery stores.

Retail Trade industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops, and other retail stores.

Lodging industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.

Public Transportation industry: Air transportation, taxicab companies, interurban & rural bus transportation, railroad passenger transportation (Amtrak) and water passenger transportation. Also is the "dummy" industry of "other transportation."

Travel Arrangement industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

TRAVEL RELATED INDUSTRY BY NAICS

Accommodations

- 7211 Traveler Accommodations
- 7212 Recreational Vehicle Parks & Campgrounds

Auto Transportation

- 532111 Passenger Car Rental
- 447 Gasoline Stations
- 4411 Automobile Dealers
- 4412 Other Motor Vehicle Dealers
- 4413 Automotive Parts, Accessories and Tire Stores
- 8111 Automotive Repair and Maintenance

Entertainment and Recreation

- 711 Performing Arts, Spectator Sports & Related Industries
- 712 Museums, Historical Sites & Similar Institutions
- 713 Amusement, Gambling & Recreation

Food

- 7221 Full service Restaurants
- 7222 Limited Service Eating Places
- 7224 Drinking Places
- 445 Food and Beverage stores

Public Transportation

- 481 Passenger Air Transportation
- 4881 Airport Support Activities
- 4821 Rail Transportation
- 4852 Interurban and Rural Bus Transportation
- 4853 Taxi & Limousine Services
- 485510 Charter Bus
- 483112 Deep Sea Passenger Transportation
- 483114 Coastal and Great Lakes Passenger Transportation
- 483212 Inland Water Passenger Transportation
- 487 Scenic & Sightseeing Transportation

Retail

- 451 Sporting Goods, Hobby, Book, and Music Stores
- 452 General Merchandise Stores
- 453 Miscellaneous Store Retailers
- 443 Electronics and Appliance Stores
- 444 Building Material and Garden Equipment and Supplies Dealers
- 446 Health and Personal Care Stores
- 448 Clothing and Clothing Accessories Stores

Travel Arrangement

- 5615 Travel Arrangement & Reservation Services (includes travel agencies and tour operators)

Appendix D: Sources of Data

This appendix presents the sources of data used in this report.

Organizations

Airlines for America (A4A), (formerly known as Air Transport Association of America - ATA)
American Automobile Association
Amtrak
American Society of Travel Agents
Bureau of the Census, U.S. Department of Commerce
Bureau of Economic Analysis, U.S. Department of Commerce
Bureau of Labor Statistics, U.S. Department of Labor
Bureau of Transportation Statistics, U.S. Department of Commerce
Federal Aviation Administration, U.S. Department of Transportation
Federal Highway Administration, U.S. Department of Transportation
National Park Service
Iowa Workforce Development, Labor Market Information Bureau
Iowa Economic Development Authority, Iowa Tourism Office
Iowa Department of Transportation
Iowa Department of Revenue and Finance
Smith Travel Research
The Office of Travel and Tourism Industries (OTTI)/ITA, U.S. Department of Commerce
U.S. Travel Association