

The Economic Impact of Travel on Iowa Counties 2014

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 2015

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 2014 and 2013 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 2014 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, 2013 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 2014 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 \$8.0 billion (in current dollars) in 2014, representing an increase of 4.0 percent from 2013.
- Total payroll income received by domestic travel-generated employees and workers in Iowa, increased 4.0 percent from 2013 to over \$1.2 billion in 2014.
- Domestic traveler expenditures directly generated 66,500 jobs in Iowa during 2014, a 1.6 percent increase from 2013. Domestic travel-generated jobs in Iowa comprised 4.3 percent of total state non-farm employment in 2014.
- On average, every \$121,244 spent by domestic travelers in Iowa during 2014 supported one job. Likewise, every dollar spent by domestic travelers produced 15.2 cents in payroll income for Iowa residents in 2014.
- Domestic traveler spending in Iowa directly generated \$899.7 million in federal, state and local tax revenue in 2014, up 4.9 percent from 2013.
- Polk County, which includes the city of Des Moines, generated nearly \$1.9 billion in domestic traveler expenditures to lead all Iowa counties in 2014.
- Fifteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2014. Thirteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

NATIONAL SUMMARY 2014

After suffering from negative growth in the first quarter of 2014, the U.S. economy recovered and registered robust growth in the second and third quarters, followed by modest growth in the fourth quarter. Real GDP in the United States (in chained 2009 dollars) increased 2.4 percent annually in 2014, slightly higher than the 2.2 percent increase in 2013.

For the year overall, consumer spending grew at about the same pace in 2014 as 2013, service exports grew noticeably slower, and investment spending and goods exports picked up quite significantly. As a result, the pace of real GDP growth in 2014 was slightly higher than in 2013, despite a difficult first quarter.

The U.S. employment situation continued to improve as well: non-farm employment increased by 2.6 million to 139 million jobs, with total travel-related employment counted at 15.0 million in 2014. This indicates that one in nine U.S. non-farm jobs directly or indirectly relies on the travel industry. This includes 8.0 million jobs directly supported by traveler spending in 2014, and 7.0 million jobs supported by secondary effects of traveler spending, be it through indirect (e.g., utility use for restaurants) or induced (e.g., spending from travel industry employees) means.

The Consumer Price Index (CPI) rose 1.6 percent in 2014 and U.S. Travel Association's Travel Price Index (TPI) increased a similar 1.5 percent during the same period. Decreased motor fuel price during 2014 is the major reason why the TPI grew at a slightly slower rate than CPI.

After increasing at a moderate 2.2 percent annual rate in the fourth quarter of 2014, real GDP, in chained 2009 dollars, contracted by 0.2 percent (annualized) in the first quarter of 2015. The primary reasons for this contraction were a sharp drop in goods exports (largely a factor of the strong dollar as well as labor dispute that temporarily caused a West Coast port shutdown) and falling business investment.

Through the first six months of 2015, the seasonally adjusted unemployment rate decreased from 5.7 percent in January to 5.3 percent in June, and a total of nearly 1.3 million jobs were added since December 2014. In May of 2015, CPI was unchanged from May of 2014, while the TPI was significantly lower, decreasing 3.4 percent compared with the same time in 2014.

Table 1: Overall U.S. Economic Indicators, 2012-2014

<u>Sector</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
Nominal gross domestic product (\$Billions)	16,163.2	16,768.1	17,418.9
Real gross domestic product (\$ Billions)*	15,369.2	15,710.3	16,085.6
Real disposable personal income (\$Billions)*	11,676.2	11,650.8	11,943.3
Real personal consumption expenditures (\$Billions)*	10,449.7	10,699.7	10,969.0
Consumer price index**	229.6	233.0	236.7
Travel Price Index**	273.0	275.6	279.6
Non-farm payroll employment (Millions)	134.1	136.4	139.0
Unemployment rate (%)	8.1	7.4	6.2
Percentage change from previous year			
Nominal gross domestic product	4.2%	3.7%	3.9%
Real gross domestic product	2.3%	2.2%	2.4%
Real disposable personal income	3.0%	-0.2%	2.5%
Real personal consumption expenditures	1.8%	2.4%	2.5%
Consumer price index	2.1%	1.5%	1.6%
Travel Price Index	2.3%	0.9%	1.5%
Non-farm payroll employment	1.7%	1.7%	1.9%

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

* In chained 2009 dollars

** 1982-84=100

U.S. Travel Volume in 2014

U.S. domestic travel, including leisure and business travel increased 2.4 percent to a total of 2.1 billion person-trips in 2014. 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 2.7 percent in 2014, totaling close to 1.7 billion person-trips and is forecasted to increase 2.0 percent in 2015. Leisure travel accounted for 78.6 percent of all U.S. domestic travel in 2014. Domestic business travel grew 1.3 percent in 2014 to 450 million person-trips. International inbound travelers, including visitors from overseas, Canada and Mexico, made 74.8 million visits to the United States in 2014, up 6.8 percent from 2013.

Travel Expenditures in 2014

Domestic and international travel spending in the U.S. totaled \$927.9 billion, a 4.7 percent increase from 2013. Leisure traveler spending totaled \$644.9 billion-and grew by 4.2 percent from 2013. Business travelers' spending increased 5.8 percent over 2013 to \$283.0 billion in 2014. Of this total, meeting and convention travelers spent \$114.2 billion.

Domestic travelers directly spent \$790.7 billion in 2014, a 5.3 percent increase from 2013. The growth in domestic spending in 2014 was significantly faster than in 2013 (3.1%). Domestic travel expenditures are expected to slow down in 2015 and increase 1.4 percent.

International travelers spent \$137.0 billion in the U.S. during 2014, up 1.1 percent from 2013. This was, by far, the slowest increase during the current recovery period following the 2009 recession. (The strengthening of the US dollar, which made the U.S. more expensive for international visitors, may have contributed to this slower growth in international spending). In addition, international travelers paid a total of \$43.7 billion to U.S. air carriers on international passenger fares in 2014, an increase of 4.9 percent from 2013. International traveler spending in the U.S. is estimated to increase 1.2 percent in 2015.

Increasing for a fifth consecutive year, real travel spending (in chained 2005 dollars) rose 3.8 percent in 2014. The price of travel goods and services increased 1.5 percent in 2014, according to the U.S. Travel Association's Travel Price Index (TPI). Motor fuel prices declined by 3.8 percent in 2014. The TPI is expected to decrease by 1.5 percent in 2015.

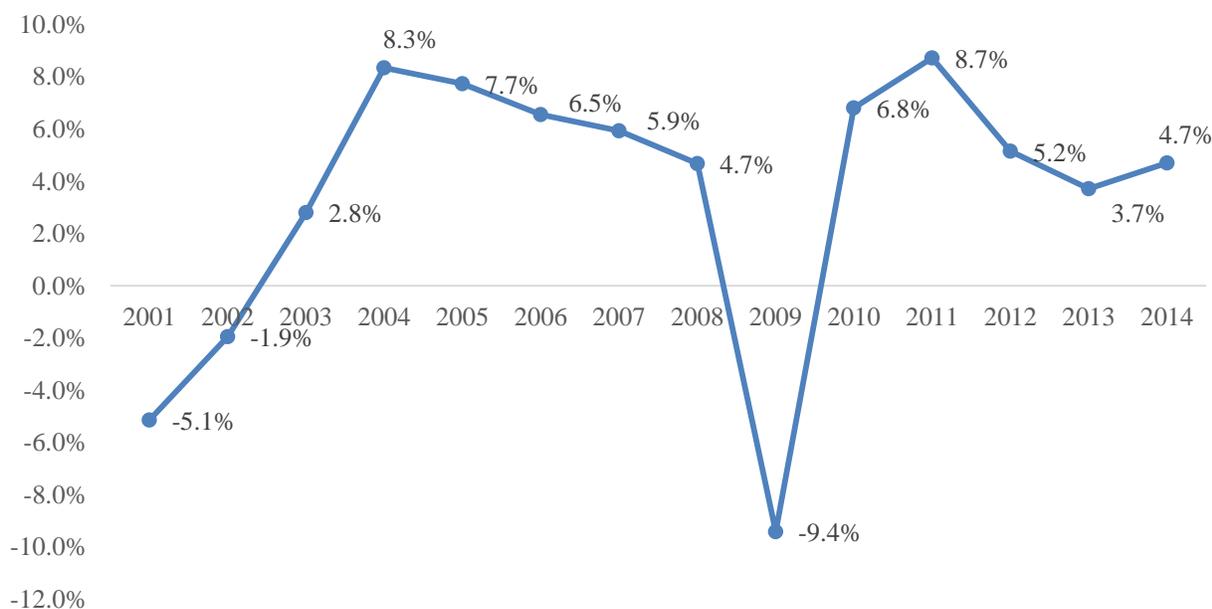
Table 2: Travel Expenditures - U.S. Nationwide

Category	2013 Spending (\$ Billions)			2014 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$153.0	\$15.0	\$168.1	\$160.5	\$15.1	\$175.6
Auto Transportation	156.4	1.6	158.0	161.2	1.7	162.8
Lodging	128.2	38.6	166.8	141.8	39.9	181.7
Foodservice	180.3	28.8	209.1	191.1	29.2	220.3
Entertainment & Recreation	80.8	10.7	91.4	82.1	10.6	92.7
General Retail Trade	52.0	40.9	92.9	54.2	40.5	94.7
Total	\$750.7	\$135.6	\$886.3	\$790.9	\$137.0	\$927.9

Source: U.S. Travel Association

* Excludes international passenger fare payments.

**Changes of Direct Travel Expenditures*
in the U.S., 2001-2014p**



Source: U.S. Travel Association. P: preliminary. * Excludes international passenger fare payments.

Travel Employment in 2014

The unemployment rate in the U.S. took another step down from its 9.6 percent peak in 2010. The 2014 unemployment rate dropped 1.2 percentage points from 2013 to 6.2 percent, and total non-farm employment in the U.S. increased 1.9 percent in 2014. This marks the fourth consecutive year of growth after three years of decline.

In the current recovery, travel has proven to be one of the most efficient job-creating engines of the U.S. economy. Accounting for 5.8 percent of total non-farm employment in the U.S., travel directly supported nearly 8.0 million U.S. jobs in 2014, an increase of 2.1 percent from 2013. In the first half of 2015, the travel industry added 48,600 jobs, and since the overall employment recovery began in early 2010, the travel industry has outpaced job growth in the rest of the economy by 33 percent.

Category	2013 Employment (Thousands)			2014 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	882.2	67.1	949.2	890.9	64.9	955.8
Auto Transportation	264.5	2.1	266.5	273.4	2.0	275.4
Lodging	1,213.5	271.8	1,485.3	1,243.0	257.8	1,500.8
Foodservice	2,707.5	430.3	3,137.8	2,801.4	422.0	3,223.4
Entertainment & Recreation	1,119.7	226.5	1,346.1	1,160.5	226.3	1,386.8
General Retail Trade	321.6	171.2	492.8	335.5	166.7	502.2
Travel Planning	164.4	0.0	164.4	165.4	0.0	165.4
Total	6,673.4	1,168.9	7,842.3	6,870.1	1,139.7	8,009.7

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

U.S. Travel Trends, 2009-2018

Table 4: U.S. Travel Forecasts

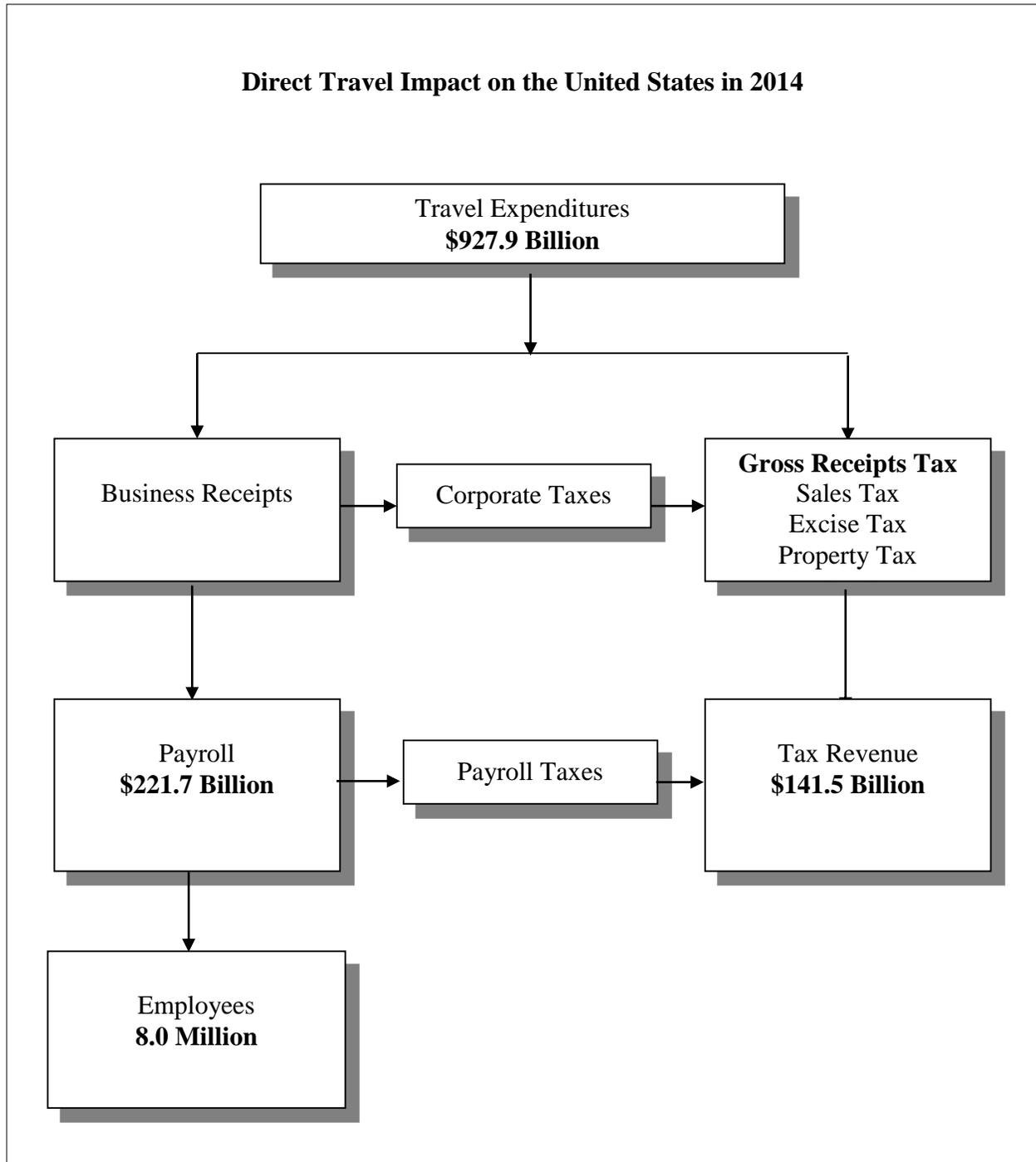
	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
Real GDP (\$ Billions)*	14,418.7	14,783.8	15,020.6	15,369.2	15,710.3	16,085.6	16,528.2	16,984.6	17,442.0	17,908.3
Unemployment Rate (%)	9.3	9.6	8.9	8.1	7.4	6.2	5.4	5.0	5.0	5.1
Consumer Price Index (CPI)**	214.5	218.1	224.9	229.6	233.0	236.7	237.6	243.2	248.5	253.9
Travel Price Index (TPI)**	241.5	250.7	266.9	273.0	275.6	279.6	275.5	285.7	295.3	305.3
Total Travel Expenditures in U.S. (\$ Billions)	699.8	747.4	812.7	854.5	886.3	927.9	940.6	978.2	1,019.6	1,063.0
U.S. Residents	609.1	640.6	694.0	728.0	750.7	790.9	802.0	832.7	864.7	898.1
International Visitors***	90.7	106.9	118.6	126.6	135.6	137.0	138.6	145.5	154.9	164.9
Total International Visitors to the U.S. (Millions)	55.1	60.0	62.8	66.7	70.0	74.8	77.6	80.8	84.5	88.3
Overseas Arrivals the U.S. (Millions)	23.8	26.4	27.9	29.8	32.0	34.4	35.6	37.5	39.5	41.6
Total Domestic Person-Trips (Millions)	1,900.1	1,963.7	1,997.5	2,030.3	2,059.6	2,109.3	2,151.1	2,189.1	2,223.9	2,258.5
Business	434.3	446.4	440.7	439.2	444.6	450.4	458.3	465.0	470.2	476.0
Leisure	1,465.8	1,517.3	1,556.8	1,591.1	1,615.1	1,658.9	1,692.8	1,724.1	1,753.7	1,782.5
<i>Percent Change from Previous Year (%)</i>										
Real GDP	-2.8	2.5	1.6	2.3	2.2	2.4	2.8	2.8	2.7	2.7
Consumer Price Index (CPI)	-0.4	1.6	3.2	2.1	1.5	1.6	0.4	2.3	2.2	2.2
Travel Price Index (TPI)	-6.3	3.8	6.5	2.3	0.9	1.5	-1.5	3.7	3.4	3.4
Total Travel Expenditures in U.S.	-9.4	6.8	8.7	5.2	3.7	4.7	1.4	4.0	4.2	4.3
U.S. Residents	-8.8	5.2	8.3	4.9	3.1	5.3	1.4	3.8	3.9	3.9
International Visitors	-13.3	17.8	11.0	6.7	7.1	1.1	1.2	5.0	6.4	6.5
Total International Visitors to the U.S.	-5.2	8.9	4.7	6.1	5.0	6.8	3.8	4.2	4.6	4.5
Overseas Arrivals the U.S.	-6.3	11.0	5.8	6.7	7.7	7.4	3.5	5.4	5.3	5.2
Total Domestic Person-Trips	-3.3	3.3	1.7	1.6	1.4	2.4	2.0	1.8	1.6	1.6
Business	-5.8	2.8	-1.3	-0.3	1.2	1.3	1.8	1.5	1.1	1.2
Leisure	-2.5	3.5	2.6	2.2	1.5	2.7	2.0	1.8	1.7	1.6

Sources: U.S. Travel Association

* In chained 2009 dollars

**1982-84=100.

*** International traveler spending does not include international passenger fares.



Source: U.S. Travel Association, BEA

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

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DOMESTIC TRAVEL IMPACT ON IOWA

TRAVEL EXPENDITURES

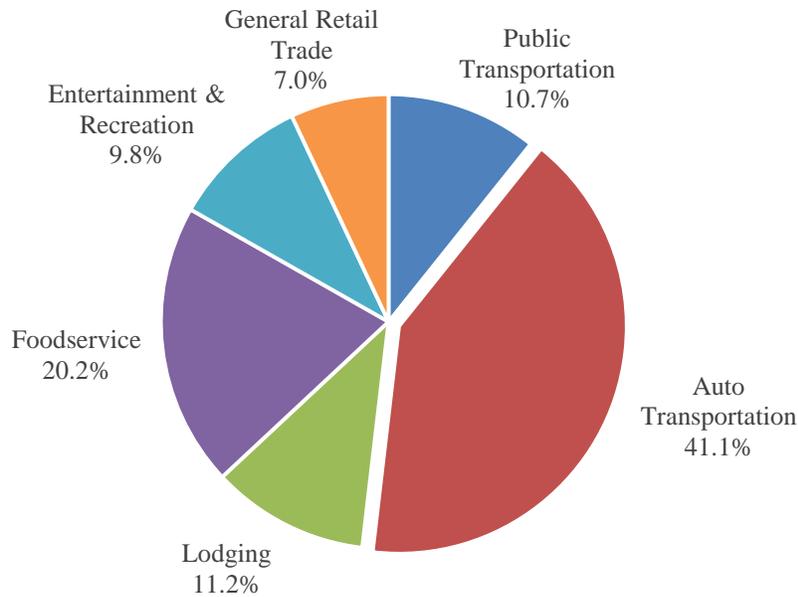
Domestic traveler spending in Iowa totaled close to \$8.1 billion (in current dollars) during 2014, representing an increase of 4.0 percent from 2013.

Auto transportation, foodservices, and lodging are the top three spending categories for domestic travelers in Iowa. Domestic travelers spent \$3.3 billion on auto transportation, up 1.2 percent from 2013. This sector accounted for 41.1 percent of total domestic travelers' spending in Iowa.

Accounting for 20.2 percent of the state total domestic traveler expenditures, spending on foodservice rose 5.5 percent to \$1.6 billion in 2014. Domestic travelers' spending on lodging was up 9.4 percent to \$902.1 million in 2014.

In 2014, domestic travelers' spending on public transportation was up 5.3 percent from 2013 to \$864.9 million. Domestic travelers spent \$788.9 million on entertainment and recreation sector in 2014, up 4.4 percent from 2013. Domestic travelers' spending on general retail increased 5.8 percent to \$563.7 million in 2014.

**Domestic Travel Expenditures in Iowa in 2014
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, 2013-2014

<i>2014 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
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>2013 Travel Expenditures</i>		
Public Transportation	\$821.4	10.6%
Auto Transportation	3,276.0	42.3%
Lodging	824.8	10.6%
Foodservice	1,540.4	19.9%
Entertainment & Recreation	755.4	9.7%
General Retail Trade	532.9	6.9%
Total	\$7,750.9	100.0%
<i>Percent Change 2014 over 2013</i>		
Public Transportation	5.3%	
Auto Transportation	1.2%	
Lodging	9.4%	
Foodservice	5.5%	
Entertainment & Recreation	4.4%	
General Retail Trade	5.8%	
Total	4.0%	

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

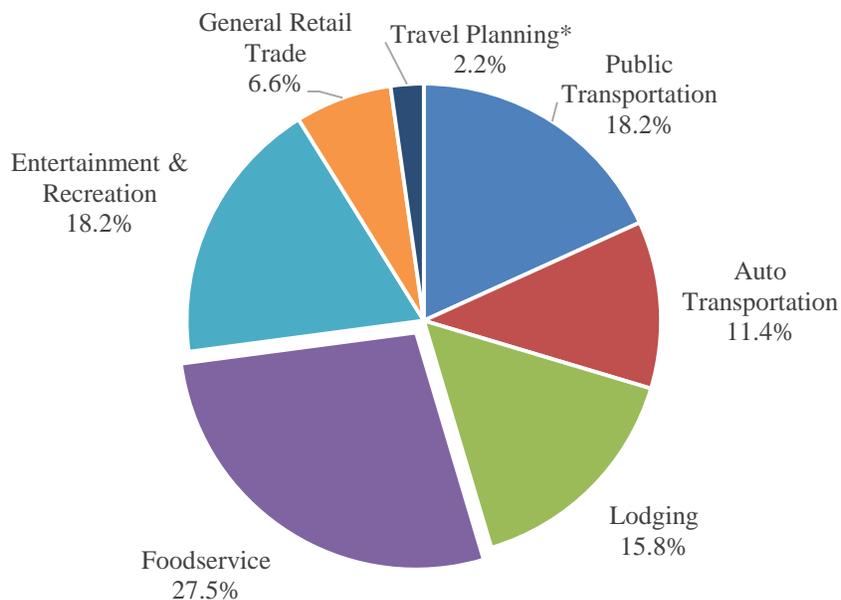
Travel-generated payroll is defined as the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry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

In 2014, total payroll income received by domestic travel-generated employees and workers in Iowa, increased 4.0 percent from 2013 to over \$1.2 billion. On the average, every dollar spent by domestic travelers produced 15.2 cents in payroll income in Iowa during 2014.

The foodservice sector, which posted the highest share of payroll (27.5%) among the seven industry sectors investigated in this report, was up by 5.0 percent from 2013 to \$337.9 million.

Entertainment and recreation, the second largest sector (18.2%) in Iowa travel industry by domestic travel generated payroll, increased 2.9 percent from 2013 to \$224.1 million. The public transportation sector followed entertainment and recreation sector very closely, reaching \$223.7 million in 2014.

**Domestic Travel-Generated Payroll in Iowa in 2014
by Industry Sector**



Domestic Travel-Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2013-2014

<i>2014 Payroll</i>	<u>Total</u> <u>(\$ Millions)</u>	<u>% of Total</u> <u>(Percent)</u>
Public Transportation	\$223.7	18.2%
Auto Transportation	140.2	11.4%
Lodging	193.8	15.8%
Foodservice	337.9	27.5%
Entertainment & Recreation	224.1	18.2%
General Retail Trade	81.2	6.6%
Travel Planning*	27.6	2.2%
<hr/>		
Total	\$1,228.6	100.0%
 <i>2013 Payroll</i>		
Public Transportation	\$219.2	18.6%
Auto Transportation	136.1	11.5%
Lodging	184.8	13.7%
Foodservice	321.7	26.5%
Entertainment & Recreation	217.9	20.8%
General Retail Trade	75.6	6.5%
Travel Planning*	25.6	2.6%
<hr/>		
Total	\$1,180.8	100.0%
<hr/>		
<i>Percent Change</i>		
<i>2014 over 2013</i>		
Public Transportation	2.1%	
Auto Transportation	3.0%	
Lodging	4.9%	
Foodservice	5.0%	
Entertainment & Recreation	2.9%	
General Retail Trade	7.5%	
Travel Planning*	7.8%	
<hr/>		
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 2014 increased 1.6 percent from 2013 to 66,500.

On the average, every \$121,244 spent by domestic travelers in Iowa directly supported one job in 2014.

The 66,500 jobs supported by domestic travel in Iowa comprised 4.3 percent of state's total non-agricultural employment during 2014. Without these jobs generated by domestic travel, Iowa's 2014 unemployment rate of 4.4 percent would have been 3.9 percentage points higher, or 8.3 percent of the labor force.

The foodservice sector that includes restaurants and other eating and drinking establishments provided more jobs than any other industry sectors investigated in this report. During 2014, 25,300 jobs in this sector were supported directly by domestic travel in Iowa, accounting for 38.0 percent of total domestic travel-generated jobs in the state. Employment in this sector increased 1.9 percent from 2013.

Domestic travel directly supported 12,500 jobs in entertainment and recreation sector in 2014, the second largest component of the state total. The lodging sector supported 11,900 job in 2014.

**Domestic Travel-Generated Employment in Iowa in 2014
by Industry Sector**

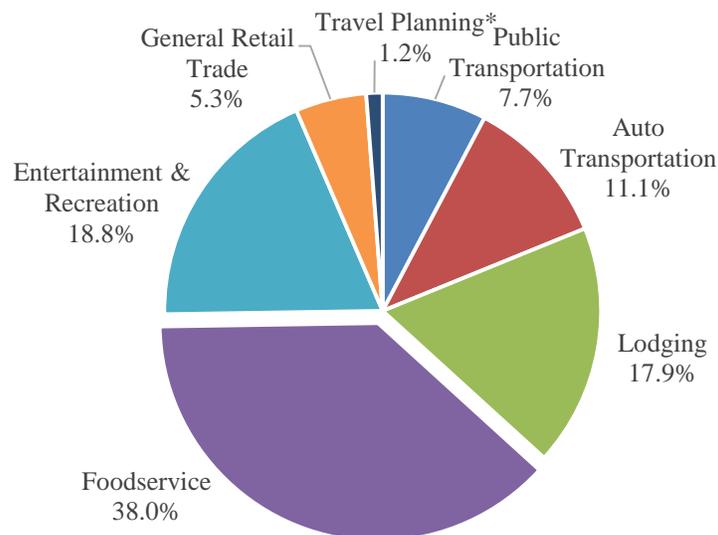


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2013-2014

<i>2014 Employment</i>	Total (Thousand)	% of Total (Percent)
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>2013 Employment</i>		
Public Transportation	5.1	7.8%
Auto Transportation	7.2	11.0%
Lodging	11.7	17.9%
Foodservice	24.8	37.9%
Entertainment & Recreation	12.4	19.0%
General Retail Trade	3.4	5.2%
Travel Planning*	0.8	1.2%
Total	65.4	100.0%
<i>Percent Change 2014 over 2013</i>		
Public Transportation	0.0%	
Auto Transportation	3.1%	
Lodging	1.6%	
Foodservice	1.9%	
Entertainment & Recreation	0.3%	
General Retail Trade	3.7%	
Travel Planning*	1.7%	
Total	1.6%	

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 2014, total tax revenues directly generated by domestic travelers' spending in Iowa grew 4.9 percent from 2013 to a total of \$899.7 million. The federal government collected a total of \$413.6 million from domestic traveler spending, an increase of 4.5 percent. The tax revenue collected by the federal government accounted for 46.0 percent of all domestic travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.1 cents for federal tax coffers.

The tax revenue generated by domestic travelers' spending for Iowa's state treasury rose 5.9 percent to a total of \$374.7 million, accounting for 41.7 percent of all domestic travel-generated tax revenue for 2014. On average, each domestic travel dollar produced 4.6 cents in tax revenue for Iowa's state government.

The tax revenue collected by the local governments (counties and cities) were 3.3 percent higher than in 2013 to a total of \$111.3 million. Each domestic travel dollar produced 1.4 cents for local tax coffers.

Domestic Travel-Generated Tax Revenue in Iowa in 2014 by Level of Government

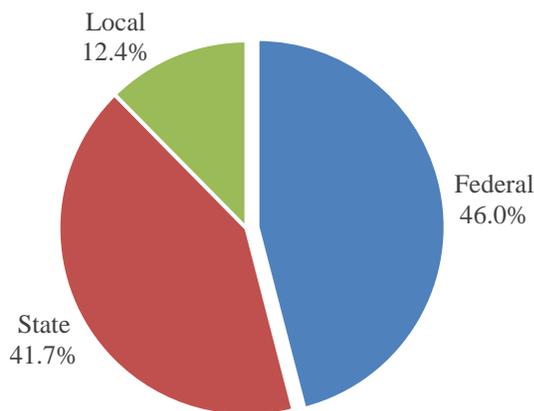


Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2013-2014

<i>2014 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$413.6	46.0%
State	374.7	41.7%
Local	111.3	12.4%
Total	\$899.7	100.0%
<i>2013 Tax Revenue</i>		
Federal	\$395.8	46.2%
State	353.9	41.3%
Local	107.8	12.6%
Total	\$857.5	100.0%
<i>Percent Change 2014 over 2013</i>		
Federal	4.5%	
State	5.9%	
Local	3.3%	
Total	4.9%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2014, domestic travel expenditures in Iowa totaled close to \$8.1 billion (in current dollars), representing an increase of 4.0 percent from 2013. This spending directly generated 66,500 jobs and over \$1.2 billion in payroll income. Additionally, a total of \$486.1 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 nearly half of the state total (49.9 percent). Domestic travel spending in the top five counties generated \$663.9 million in payroll (54.0 percent of the state total) and 35,000 jobs (52.7 percent of the state total) in 2014.

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 2014. Domestic traveler expenditures in Polk County reached nearly \$1.9 billion, accounting for 23.5 percent of the state total. These expenditures generated \$328.2 million in payroll income and 16,300 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$770.3 million in domestic travel spending in 2014, representing 9.6 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$128.0 million and 6,200 jobs.

Scott County posted \$621.7 million in domestic expenditures to rank third. These expenditures generated \$95.4 million in payroll as well as 6,100 jobs within the county.

Johnson County ranked fourth with \$387.0 million in domestic travel expenditures. These travel expenditures benefited county residents with \$58.1 million in payroll income and 3,600 jobs.

Black Hawk County ranked fifth by domestic travel spending in 2014. Domestic travelers spent \$351.0 million in the county, generating \$54.3 million in payroll income and 2,800 jobs.

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2013-2014**2014 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	\$1,890.7	\$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%

2013 Travel Impact

POLK	\$1,801.2	\$314.4	15.9	\$75.1	\$28.5
LINN	734.6	121.7	6.0	29.7	10.7
SCOTT	598.4	91.8	6.0	29.9	9.1
JOHNSON	368.6	55.3	3.5	16.7	5.7
BLACK HAWK	338.5	52.5	2.8	13.8	4.5
FIVE COUNTY TOTAL	\$3,841.3	\$635.7	34.3	\$165.4	\$58.4
STATE TOTALS	\$7,750.9	\$1,180.8	65.4	\$353.9	\$107.8
FIVE COUNTY SHARE	49.6%	53.8%	52.5%	46.7%	54.2%

Percent Change - 2014 over 2013

POLK	5.0%	4.4%	2.1%	6.3%	4.0%
LINN	4.9%	5.1%	2.8%	7.5%	4.6%
SCOTT	3.9%	4.0%	1.2%	5.7%	2.9%
JOHNSON	5.0%	4.9%	2.3%	6.7%	4.1%
BLACK HAWK	3.7%	3.5%	1.0%	5.2%	2.4%
FIVE COUNTY TOTAL	4.7%	4.4%	2.0%	6.4%	3.8%
STATE TOTALS	4.0%	4.0%	1.6%	5.9%	3.3%

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 2013 and 2014 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2014 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 2014 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2014.

Table D shows the percent change in 2014 over 2013 estimates for each of the measures of economic impact.

Table E shows the counties listed alphabetically, with 2013 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2014					
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
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 A: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table A: 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 A: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table A: 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 A: Alphabetical by County, 2014

2014 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2014 (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	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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Table B: Ranking of Counties by Expenditure Levels, 2014

2014 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 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>
POLK	\$1,890.67	\$328.17	16.28	\$79.90	\$29.60
LINN	770.33	127.96	6.20	31.99	11.23
SCOTT	621.67	95.42	6.10	31.61	9.34
JOHNSON	386.99	58.05	3.62	17.87	5.91
BLACK HAWK	351.01	54.35	2.84	14.55	4.58
DUBUQUE	329.01	50.58	2.83	14.72	4.28
POTTAWATTAMIE	304.79	52.86	3.16	16.86	4.48
WOODBURY	283.82	47.28	2.22	11.02	3.96
DICKINSON	275.48	32.55	1.95	14.17	4.75
STORY	201.84	28.09	1.62	8.97	2.54
CERRO GORDO	191.37	25.15	1.48	8.77	3.15
DALLAS	185.27	28.42	1.76	8.87	1.56
DES MOINES	131.99	22.60	1.03	5.23	1.82
CLINTON	117.33	16.19	0.97	5.67	1.46
CLAY	102.77	21.32	0.72	2.33	1.27
MARSHALL	86.31	12.36	0.68	4.16	1.08
WAPELLO	85.21	10.95	0.63	4.44	1.06
MUSCATINE	80.25	11.73	0.70	4.33	0.95
JASPER	72.80	9.03	0.53	3.33	0.86
WEBSTER	65.27	10.29	0.55	3.29	0.59
LEE	60.93	8.82	0.51	3.14	0.84
CARROLL	56.22	6.99	0.43	2.77	0.40
BREMER	53.77	6.60	0.44	2.56	0.37
MARION	50.51	6.12	0.35	2.53	0.40
POWESHIEK	47.45	5.70	0.30	2.62	0.89
IOWA	42.88	6.46	0.42	2.37	0.63
JEFFERSON	40.61	5.93	0.37	1.91	0.32

Table B: Ranking of Counties by Expenditure Levels, 2014

2014 Domestic Travel Impact on Iowa**Table B: Ranking of Counties by Expenditure Levels, 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>
ALLAMAKEE	40.12	3.76	0.20	1.94	0.94
WARREN	36.86	3.28	0.19	1.85	0.29
SIOUX	36.04	4.43	0.24	1.93	0.25
PALO ALTO	33.83	4.63	0.25	1.98	0.63
CLAYTON	33.25	4.27	0.24	1.69	0.63
JACKSON	31.15	4.05	0.23	1.76	0.62
BUENA VISTA	29.92	3.66	0.20	1.46	0.26
WINNESHIEK	29.52	5.06	0.33	1.71	0.28
HARRISON	27.92	3.37	0.22	1.45	0.19
BUCHANAN	27.15	2.53	0.13	1.48	0.29
CASS	26.93	2.81	0.16	1.40	0.18
BOONE	25.93	2.90	0.16	1.49	0.20
CLARKE	25.01	2.83	0.18	1.28	0.20
HAMILTON	24.80	3.04	0.18	1.26	0.19
PLYMOUTH	24.35	2.71	0.15	1.38	0.17
CEDAR	23.29	2.52	0.14	1.41	0.29
HARDIN	22.24	2.03	0.10	0.96	0.15
O'BRIEN	22.14	2.67	0.15	1.19	0.16
HENRY	21.58	3.07	0.17	1.05	0.29
JONES	21.52	2.03	0.11	1.24	0.14
CRAWFORD	20.81	3.16	0.18	1.24	0.18
MONTGOMERY	20.77	3.52	0.22	1.44	0.21
TAMA	20.40	3.06	0.18	1.05	0.21
MONONA	19.98	3.10	0.17	1.01	0.24
MAHASKA	19.79	3.77	0.21	1.48	0.29
BENTON	19.06	1.72	0.10	1.18	0.12
FLOYD	18.32	2.66	0.12	0.90	0.16

Table B: Ranking of Counties by Expenditure Levels, 2014

2014 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 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>	
PAGE	17.89	1.70	0.10	0.95	0.16	
WRIGHT	17.77	1.84	0.09	0.92	0.27	
FAYETTE	17.72	1.76	0.09	0.92	0.14	
APPANOOSE	17.32	2.00	0.11	0.92	0.22	
KOSSUTH	17.02	1.73	0.10	0.92	0.11	
WASHINGTON	16.25	1.79	0.11	0.89	0.11	
ADAIR	16.12	1.47	0.09	0.62	0.11	
UNION	15.50	2.05	0.12	0.97	0.16	
CHEROKEE	15.40	2.19	0.13	1.03	0.13	
SAC	15.36	1.42	0.07	0.83	0.29	
FREMONT	15.04	1.97	0.12	0.77	0.13	
SHELBY	14.58	1.59	0.09	0.78	0.13	
LOUISA	14.23	1.72	0.10	0.97	0.34	
MADISON	13.61	1.15	0.06	0.75	0.12	
GUTHRIE	13.34	1.86	0.10	1.05	0.32	
DECATUR	13.18	1.05	0.06	0.59	0.11	
HUMBOLDT	12.36	1.91	0.07	0.44	0.14	
FRANKLIN	12.19	1.25	0.07	0.69	0.07	
WINNEBAGO	11.99	1.03	0.06	0.67	0.09	
EMMET	11.72	1.46	0.07	0.65	0.13	
MITCHELL	10.95	1.09	0.06	0.54	0.10	
CALHOUN	10.73	1.21	0.06	0.65	0.26	
RINGGOLD	10.35	0.93	0.04	0.61	0.19	
CHICKASAW	10.34	1.52	0.10	0.63	0.11	
BUTLER	9.05	0.70	0.03	0.55	0.05	
DELAWARE	9.01	0.91	0.05	0.49	0.09	
MONROE	8.43	1.43	0.09	0.60	0.10	

Table B: Ranking of Counties by Expenditure Levels, 2014

2014 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 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>	
MILLS	8.09	0.92	0.06	0.59	0.07	
LUCAS	7.69	0.84	0.05	0.40	0.08	
WAYNE	6.98	0.82	0.05	0.50	0.10	
DAVIS	6.83	0.63	0.04	0.35	0.08	
WORTH	6.64	0.48	0.03	0.33	0.04	
LYON	6.56	0.62	0.03	0.39	0.05	
VAN BUREN	6.49	0.82	0.05	0.41	0.08	
IDA	6.36	0.81	0.05	0.41	0.07	
GREENE	6.31	0.66	0.03	0.35	0.07	
HANCOCK	6.28	0.88	0.04	0.36	0.10	
GRUNDY	5.26	0.71	0.04	0.36	0.05	
AUDUBON	5.14	0.52	0.02	0.33	0.05	
KEOKUK	4.95	0.44	0.02	0.27	0.05	
HOWARD	4.67	0.53	0.03	0.26	0.05	
POCAHONTAS	4.56	0.49	0.03	0.25	0.05	
OSCEOLA	3.51	0.41	0.03	0.19	0.03	
TAYLOR	3.45	0.32	0.02	0.24	0.03	
<u>ADAMS</u>	<u>2.75</u>	<u>0.30</u>	<u>0.02</u>	<u>0.16</u>	<u>0.03</u>	
STATE TOTALS	\$8,059.21	\$1,228.57	66.47	\$374.73	\$111.33	

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Table C: Percent Distribution by County, 2014

2014 Domestic Travel Impact on Iowa						
Table C: Percent Distribution by County, 2014						
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>	
ADAIR	0.20%	0.12%	0.14%	0.16%	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	0.21%	0.16%	0.17%	0.25%	0.20%	
AUDUBON	0.06%	0.04%	0.03%	0.09%	0.05%	
BENTON	0.24%	0.14%	0.15%	0.32%	0.11%	
BLACK HAWK	4.36%	4.42%	4.27%	3.88%	4.11%	
BOONE	0.32%	0.24%	0.24%	0.40%	0.18%	
BREMER	0.67%	0.54%	0.66%	0.68%	0.33%	
BUCHANAN	0.34%	0.21%	0.20%	0.39%	0.26%	
BUENA VISTA	0.37%	0.30%	0.30%	0.39%	0.24%	
BUTLER	0.11%	0.06%	0.05%	0.15%	0.04%	
CALHOUN	0.13%	0.10%	0.09%	0.17%	0.23%	
CARROLL	0.70%	0.57%	0.65%	0.74%	0.36%	
CASS	0.33%	0.23%	0.24%	0.37%	0.16%	
CEDAR	0.29%	0.21%	0.21%	0.38%	0.26%	
CERRO GORDO	2.37%	2.05%	2.23%	2.34%	2.83%	
CHEROKEE	0.19%	0.18%	0.19%	0.27%	0.12%	
CHICKASAW	0.13%	0.12%	0.14%	0.17%	0.10%	
CLARKE	0.31%	0.23%	0.27%	0.34%	0.18%	
CLAY	1.28%	1.74%	1.08%	0.62%	1.14%	
CLAYTON	0.41%	0.35%	0.37%	0.45%	0.56%	
CLINTON	1.46%	1.32%	1.46%	1.51%	1.32%	
CRAWFORD	0.26%	0.26%	0.27%	0.33%	0.16%	
DALLAS	2.30%	2.31%	2.65%	2.37%	1.40%	
DAVIS	0.08%	0.05%	0.05%	0.09%	0.07%	
DECATUR	0.16%	0.09%	0.09%	0.16%	0.10%	

Table C: Percent Distribution by County, 2014

2014 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 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	0.11%	0.07%	0.07%	0.13%	0.09%
DES MOINES	1.64%	1.84%	1.55%	1.40%	1.63%
DICKINSON	3.42%	2.65%	2.93%	3.78%	4.26%
DUBUQUE	4.08%	4.12%	4.26%	3.93%	3.84%
EMMET	0.15%	0.12%	0.11%	0.17%	0.12%
FAYETTE	0.22%	0.14%	0.14%	0.24%	0.12%
FLOYD	0.23%	0.22%	0.18%	0.24%	0.15%
FRANKLIN	0.15%	0.10%	0.10%	0.18%	0.06%
FREMONT	0.19%	0.16%	0.18%	0.21%	0.12%
GREENE	0.08%	0.05%	0.05%	0.09%	0.06%
GRUNDY	0.07%	0.06%	0.06%	0.10%	0.04%
GUTHRIE	0.17%	0.15%	0.14%	0.28%	0.29%
HAMILTON	0.31%	0.25%	0.28%	0.34%	0.17%
HANCOCK	0.08%	0.07%	0.06%	0.10%	0.09%
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%	0.05%
HUMBOLDT	0.15%	0.16%	0.11%	0.12%	0.12%
IDA	0.08%	0.07%	0.08%	0.11%	0.06%
IOWA	0.53%	0.53%	0.63%	0.63%	0.57%
JACKSON	0.39%	0.33%	0.34%	0.47%	0.56%
JASPER	0.90%	0.73%	0.80%	0.89%	0.77%
JEFFERSON	0.50%	0.48%	0.55%	0.51%	0.29%
JOHNSON	4.80%	4.73%	5.45%	4.77%	5.31%
JONES	0.27%	0.17%	0.16%	0.33%	0.13%
KEOKUK	0.06%	0.04%	0.03%	0.07%	0.05%

Table C: Percent Distribution by County, 2014

2014 Domestic Travel Impact on Iowa						
Table C: Percent Distribution by County, 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	0.21%	0.14%	0.16%	0.25%	0.10%	
LEE	0.76%	0.72%	0.76%	0.84%	0.75%	
LINN	9.56%	10.42%	9.33%	8.54%	10.08%	
LOUISA	0.18%	0.14%	0.14%	0.26%	0.30%	
LUCAS	0.10%	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	0.25%	0.31%	0.32%	0.39%	0.26%	
MARION	0.63%	0.50%	0.53%	0.67%	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	0.14%	0.09%	0.09%	0.14%	0.09%	
MONONA	0.25%	0.25%	0.25%	0.27%	0.22%	
MONROE	0.10%	0.12%	0.14%	0.16%	0.09%	
MONTGOMERY	0.26%	0.29%	0.32%	0.39%	0.19%	
MUSCATINE	1.00%	0.95%	1.05%	1.15%	0.85%	
O'BRIEN	0.27%	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%	0.38%	0.38%	0.53%	0.56%	
PLYMOUTH	0.30%	0.22%	0.22%	0.37%	0.15%	
POCAHONTAS	0.06%	0.04%	0.05%	0.07%	0.04%	
POLK	23.46%	26.71%	24.49%	21.32%	26.58%	
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, 2014

2014 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 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	7.71%	7.77%	9.17%	8.43%	8.39%
SHELBY	0.18%	0.13%	0.14%	0.21%	0.12%
SIOUX	0.45%	0.36%	0.36%	0.52%	0.23%
STORY	2.50%	2.29%	2.44%	2.39%	2.28%
TAMA	0.25%	0.25%	0.27%	0.28%	0.19%
TAYLOR	0.04%	0.03%	0.03%	0.06%	0.03%
UNION	0.19%	0.17%	0.19%	0.26%	0.15%
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%	0.49%	0.26%
WASHINGTON	0.20%	0.15%	0.16%	0.24%	0.10%
WAYNE	0.09%	0.07%	0.07%	0.13%	0.09%
WEBSTER	0.81%	0.84%	0.83%	0.88%	0.53%
WINNEBAGO	0.15%	0.08%	0.09%	0.18%	0.08%
WINNESHIEK	0.37%	0.41%	0.50%	0.46%	0.25%
WOODBURY	3.52%	3.85%	3.34%	2.94%	3.56%
WORTH	0.08%	0.04%	0.04%	0.09%	0.04%
<u>WRIGHT</u>	<u>0.22%</u>	<u>0.15%</u>	<u>0.13%</u>	<u>0.24%</u>	<u>0.24%</u>
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2013

2014 Domestic Travel Impact on Iowa						
Table D: Percent Change over 2013						
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>	
ADAIR	1.97%	1.68%	-0.93%	3.85%	0.69%	
ADAMS	1.25%	1.19%	0.18%	3.51%	-0.15%	
ALLAMAKEE	2.84%	3.67%	-0.14%	5.46%	1.84%	
APPANOOSE	1.43%	1.64%	-0.45%	3.77%	-0.43%	
AUDUBON	0.59%	1.44%	-0.39%	3.37%	-0.75%	
BENTON	0.20%	1.40%	-0.40%	3.16%	-1.03%	
BLACK HAWK	3.69%	3.46%	0.98%	5.23%	2.37%	
BOONE	4.10%	5.65%	3.75%	6.95%	3.27%	
BREMER	1.51%	2.09%	-0.06%	3.92%	0.42%	
BUCHANAN	0.88%	1.68%	0.13%	3.79%	-0.30%	
BUENA VISTA	4.08%	5.56%	3.15%	6.45%	3.41%	
BUTLER	1.61%	2.06%	0.45%	4.63%	0.10%	
CALHOUN	0.47%	-0.15%	-2.28%	2.74%	-1.02%	
CARROLL	0.99%	0.74%	-1.75%	2.59%	-0.74%	
CASS	1.99%	3.60%	1.32%	4.57%	0.72%	
CEDAR	3.34%	4.41%	2.14%	6.02%	2.32%	
CERRO GORDO	2.46%	2.05%	1.09%	5.96%	2.43%	
CHEROKEE	0.32%	-0.32%	-2.75%	1.81%	-1.39%	
CHICKASAW	1.77%	0.91%	-1.54%	3.32%	-0.15%	
CLARKE	2.49%	2.29%	-0.20%	4.63%	1.47%	
CLAY	3.97%	3.35%	0.30%	4.75%	2.75%	
CLAYTON	1.05%	-0.34%	-2.43%	3.25%	-0.23%	
CLINTON	4.34%	5.23%	3.18%	6.64%	3.58%	
CRAWFORD	1.99%	2.93%	0.29%	4.01%	1.33%	
DALLAS	4.07%	3.82%	0.91%	5.23%	3.18%	
DAVIS	1.02%	0.59%	-1.63%	3.22%	-0.66%	
DECATUR	3.55%	4.98%	2.66%	6.21%	2.16%	

Table D: Percent Change over 2013

**2014 Domestic Travel Impact on Iowa
Table D: Percent Change over 2013 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	2.98%	4.58%	2.10%	5.32%	1.65%
DES MOINES	5.52%	5.65%	2.99%	8.90%	6.10%
DICKINSON	4.11%	4.61%	1.75%	7.01%	3.66%
DUBUQUE	3.07%	2.85%	0.29%	4.71%	1.97%
EMMET	1.55%	0.97%	-1.38%	3.81%	-0.05%
FAYETTE	3.82%	4.12%	2.00%	6.18%	2.17%
FLOYD	2.74%	2.49%	0.64%	4.55%	1.06%
FRANKLIN	0.51%	1.63%	0.08%	3.57%	-0.77%
FREMONT	0.78%	0.56%	-2.10%	2.45%	-0.26%
GREENE	0.70%	0.83%	-1.20%	3.12%	-0.81%
GRUNDY	2.01%	2.61%	0.30%	4.27%	0.60%
GUTHRIE	0.70%	1.91%	0.15%	3.73%	-0.12%
HAMILTON	1.69%	0.88%	-1.39%	3.63%	0.49%
HANCOCK	1.86%	2.17%	-0.29%	3.43%	0.78%
HARDIN	2.96%	3.00%	0.66%	4.90%	1.39%
HARRISON	0.19%	-0.07%	-2.62%	2.26%	-1.15%
HENRY	4.35%	5.14%	3.31%	6.94%	3.63%
HOWARD	2.41%	5.05%	2.41%	4.88%	1.55%
HUMBOLDT	2.00%	0.46%	-1.36%	3.44%	0.32%
IDA	0.11%	0.10%	-2.07%	2.33%	-1.26%
IOWA	0.39%	0.10%	-2.25%	2.02%	-1.70%
JACKSON	3.93%	4.48%	2.38%	6.53%	2.68%
JASPER	4.18%	4.83%	2.73%	6.78%	3.63%
JEFFERSON	3.93%	4.35%	1.66%	5.82%	3.16%
JOHNSON	4.99%	4.94%	2.27%	6.73%	4.06%
JONES	1.82%	2.04%	1.26%	4.81%	0.83%
KEOKUK	1.16%	2.63%	1.52%	4.55%	-0.05%

Table D: Percent Change over 2013

**2014 Domestic Travel Impact on Iowa
Table D: Percent Change over 2013 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	3.06%	2.57%	0.06%	4.86%	1.30%
LEE	4.33%	5.48%	3.12%	7.11%	4.25%
LINN	4.86%	5.13%	2.76%	7.54%	4.57%
LOUISA	0.70%	0.47%	-1.74%	3.01%	-0.75%
LUCAS	0.98%	1.62%	-0.57%	3.35%	-0.34%
LYON	0.91%	0.26%	-1.76%	3.20%	-0.67%
MADISON	0.92%	1.79%	0.07%	3.81%	-0.47%
MAHASKA	4.27%	5.22%	3.24%	6.97%	3.47%
MARION	3.62%	6.25%	3.90%	6.78%	3.56%
MARSHALL	2.50%	2.20%	-0.03%	4.41%	0.76%
MILLS	0.46%	1.34%	0.15%	3.56%	-0.71%
MITCHELL	3.94%	2.90%	0.16%	5.56%	2.47%
MONONA	1.04%	0.54%	-1.72%	2.58%	-0.42%
MONROE	1.16%	1.23%	-1.26%	2.96%	-0.22%
MONTGOMERY	2.14%	1.57%	-0.94%	3.83%	0.45%
MUSCATINE	4.29%	5.44%	3.45%	7.13%	4.13%
O'BRIEN	1.75%	1.86%	-0.34%	4.10%	0.71%
OSCEOLA	1.61%	1.39%	-0.87%	3.63%	0.09%
PAGE	0.70%	0.91%	-1.33%	3.01%	-0.77%
PALO ALTO	1.12%	0.33%	-2.11%	2.28%	-0.37%
PLYMOUTH	2.63%	3.79%	1.43%	5.26%	1.90%
POCAHONTAS	1.50%	1.97%	-0.34%	3.64%	0.07%
POLK	4.97%	4.39%	2.11%	6.35%	3.98%
POTTAWATTAMIE	3.40%	3.22%	0.72%	4.96%	1.96%
POWESHIEK	3.70%	3.11%	0.59%	5.42%	2.05%
RINGGOLD	4.14%	3.11%	1.08%	6.96%	3.03%
SAC	2.88%	4.45%	3.08%	6.74%	2.84%

Table D: Percent Change over 2013

**2014 Domestic Travel Impact on Iowa
Table D: Percent Change over 2013 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	3.89%	3.97%	1.24%	5.68%	2.89%
SHELBY	0.89%	0.24%	-1.93%	2.57%	-1.69%
SIOUX	4.66%	6.09%	3.61%	7.48%	4.95%
STORY	4.66%	5.04%	3.37%	7.34%	4.74%
TAMA	1.96%	1.29%	-1.00%	3.53%	0.38%
TAYLOR	0.46%	1.60%	-0.14%	3.45%	-0.87%
UNION	0.81%	0.87%	-1.45%	2.85%	-0.58%
VAN BUREN	2.78%	-0.01%	-2.91%	3.25%	0.42%
WAPELLO	5.73%	6.68%	4.66%	9.04%	6.80%
WARREN	4.57%	5.52%	3.39%	7.42%	3.38%
WASHINGTON	0.66%	0.15%	-2.20%	2.42%	-0.99%
WAYNE	0.44%	1.98%	-0.07%	3.26%	-0.71%
WEBSTER	0.14%	0.47%	-0.35%	3.07%	-1.22%
WINNEBAGO	1.86%	1.94%	-0.14%	4.33%	0.31%
WINNESHIEK	2.05%	2.42%	-0.26%	3.75%	0.63%
WOODBURY	5.69%	6.37%	3.42%	7.42%	5.61%
WORTH	1.21%	1.25%	-0.70%	3.88%	-0.35%
<u>WRIGHT</u>	<u>0.80%</u>	<u>0.95%</u>	<u>-1.19%</u>	<u>3.20%</u>	<u>-0.63%</u>
STATE TOTALS	3.98%	4.05%	1.62%	5.89%	3.26%

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Table E: Alphabetical by County, 2013

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2013					
<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	\$15.81	\$1.44	0.09	\$0.59	\$0.11
ADAMS	2.72	0.30	0.02	0.16	0.03
ALLAMAKEE	39.01	3.63	0.20	1.84	0.92
APPANOOSE	17.08	1.97	0.11	0.89	0.23
AUDUBON	5.11	0.52	0.02	0.32	0.05
BENTON	19.02	1.69	0.10	1.15	0.12
BLACK HAWK	338.51	52.53	2.81	13.83	4.47
BOONE	24.91	2.75	0.15	1.40	0.20
BREMER	52.97	6.46	0.44	2.46	0.37
BUCHANAN	26.91	2.49	0.13	1.43	0.29
BUENA VISTA	28.75	3.47	0.20	1.37	0.25
BUTLER	8.91	0.68	0.03	0.52	0.05
CALHOUN	10.68	1.21	0.06	0.64	0.26
CARROLL	55.67	6.94	0.44	2.70	0.41
CASS	26.41	2.71	0.16	1.34	0.18
CEDAR	22.54	2.41	0.13	1.33	0.28
CERRO GORDO	186.78	24.65	1.47	8.28	3.08
CHEROKEE	15.35	2.20	0.13	1.01	0.13
CHICKASAW	10.16	1.51	0.10	0.61	0.11
CLARKE	24.40	2.77	0.18	1.22	0.20
CLAY	98.85	20.63	0.71	2.23	1.23
CLAYTON	32.90	4.28	0.25	1.64	0.63
CLINTON	112.45	15.39	0.94	5.32	1.41
CRAWFORD	20.41	3.07	0.18	1.19	0.18
DALLAS	178.02	27.38	1.75	8.43	1.51
DAVIS	6.76	0.63	0.04	0.34	0.08
DECATUR	12.73	1.00	0.06	0.56	0.11

Table E: Alphabetical by County, 2013

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2013 (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	8.74	0.87	0.05	0.46	0.09
DES MOINES	125.09	21.39	1.00	4.81	1.71
DICKINSON	264.61	31.12	1.91	13.24	4.58
DUBUQUE	319.21	49.18	2.82	14.06	4.20
EMMET	11.54	1.45	0.07	0.63	0.13
FAYETTE	17.07	1.69	0.09	0.86	0.13
FLOYD	17.83	2.59	0.12	0.86	0.16
FRANKLIN	12.13	1.23	0.07	0.66	0.07
FREMONT	14.92	1.96	0.12	0.76	0.13
GREENE	6.27	0.66	0.03	0.34	0.07
GRUNDY	5.16	0.69	0.04	0.35	0.05
GUTHRIE	13.25	1.83	0.10	1.01	0.32
HAMILTON	24.38	3.01	0.19	1.22	0.19
HANCOCK	6.17	0.86	0.04	0.35	0.09
HARDIN	21.60	1.97	0.10	0.91	0.15
HARRISON	27.87	3.38	0.23	1.42	0.19
HENRY	20.68	2.92	0.16	0.98	0.28
HOWARD	4.56	0.51	0.03	0.25	0.05
HUMBOLDT	12.12	1.90	0.07	0.42	0.14
IDA	6.35	0.81	0.05	0.40	0.07
IOWA	42.71	6.45	0.43	2.32	0.64
JACKSON	29.97	3.87	0.22	1.65	0.61
JASPER	69.88	8.61	0.52	3.11	0.83
JEFFERSON	39.07	5.68	0.36	1.80	0.31
JOHNSON	368.61	55.32	3.54	16.74	5.68
JONES	21.14	1.99	0.10	1.18	0.14
KEOKUK	4.89	0.43	0.02	0.25	0.05

Table E: Alphabetical by County, 2013

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2013 (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	16.51	1.69	0.10	0.88	0.11
LEE	58.40	8.37	0.49	2.93	0.80
LINN	734.62	121.71	6.03	29.74	10.74
LOUISA	14.13	1.71	0.10	0.94	0.34
LUCAS	7.61	0.83	0.05	0.38	0.08
LYON	6.50	0.62	0.03	0.37	0.05
MADISON	13.49	1.13	0.06	0.73	0.12
MAHASKA	18.98	3.59	0.20	1.38	0.28
MARION	48.75	5.76	0.34	2.36	0.38
MARSHALL	84.20	12.09	0.68	3.98	1.07
MILLS	8.05	0.90	0.06	0.57	0.07
MITCHELL	10.54	1.06	0.06	0.51	0.09
MONONA	19.77	3.08	0.17	0.98	0.24
MONROE	8.33	1.42	0.09	0.58	0.10
MONTGOMERY	20.34	3.46	0.22	1.39	0.21
MUSCATINE	76.95	11.12	0.67	4.04	0.91
O'BRIEN	21.76	2.62	0.16	1.14	0.16
OSCEOLA	3.45	0.40	0.03	0.19	0.03
PAGE	17.76	1.69	0.10	0.92	0.16
PALO ALTO	33.45	4.61	0.26	1.93	0.63
PLYMOUTH	23.72	2.61	0.15	1.31	0.17
POCAHONTAS	4.49	0.48	0.03	0.25	0.05
POLK	1,801.19	314.36	15.94	75.13	28.46
POTTAWATTAMIE	294.77	51.21	3.13	16.06	4.40
POWESHIEK	45.76	5.53	0.30	2.49	0.87
RINGGOLD	9.94	0.91	0.04	0.57	0.19
SAC	14.93	1.36	0.07	0.78	0.28

Table E: Alphabetical by County, 2013

2014 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2013 (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	598.41	91.78	6.02	29.91	9.07
SHELBY	14.46	1.58	0.09	0.76	0.13
SIOUX	34.44	4.18	0.23	1.80	0.24
STORY	192.85	26.75	1.57	8.36	2.43
TAMA	20.00	3.02	0.18	1.01	0.21
TAYLOR	3.44	0.31	0.02	0.23	0.03
UNION	15.37	2.03	0.13	0.94	0.16
VAN BUREN	6.32	0.82	0.05	0.40	0.08
WAPELLO	80.60	10.27	0.60	4.07	0.99
WARREN	35.25	3.11	0.19	1.72	0.28
WASHINGTON	16.14	1.79	0.11	0.87	0.12
WAYNE	6.95	0.80	0.05	0.48	0.10
WEBSTER	65.18	10.24	0.56	3.19	0.59
WINNEBAGO	11.77	1.01	0.06	0.64	0.09
WINNESHIEK	28.93	4.94	0.33	1.65	0.28
WOODBURY	268.54	44.45	2.15	10.26	3.75
WORTH	6.56	0.47	0.03	0.32	0.04
<u>WRIGHT</u>	<u>17.62</u>	<u>1.83</u>	<u>0.09</u>	<u>0.89</u>	<u>0.27</u>
STATE TOTALS	\$7,750.88	\$1,180.77	65.41	\$353.89	\$107.82

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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 is 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 REALTED 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