

The Economic Impact of Travel on Iowa Counties 2009

A Study Prepared for the
Iowa Department of Economic Development
Iowa Tourism Office
By the
Research Department of the
U.S. Travel Association
Washington, D.C.
October 2010



PREFACE

This study was conducted by the Research Department of the U.S. Travel Association for the **Iowa Department of Economic Development, Iowa Tourism Office**. The study provides preliminary 2009 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.
October 2010

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INTRODUCTION

This report presents preliminary 2009 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, 2008 impact data are also included in this report. Traveler spending, travel-generated payroll and tax revenue are calculated in current dollars.

All estimates of the economic impact of travel contained in this volume are the product of 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 at national, state and county levels.

The Travel Economic Impact Model (TEIM) was initially developed in 1975 for the U.S. Department of the Interior to indicate the economic value of travel and tourism to states and counties. The original TEIM has been revised substantially based upon more accurate and targeted input data available from governments and the private sector.

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

U.S. residents traveling in Iowa includes both state residents and out-of-state visitors traveling away from home overnight in paid accommodations, or on day or overnight trips to places 50 miles or more, one-way away from home. Travel 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 public-supported payroll and employment.

Since additional data relating to travel and its economic impact in 2009 will become available subsequent to this study, U.S. Travel Association reserves the right to revise these estimates in the future.

EXECUTIVE SUMMARY

Despite the anticipated recovery following the massive flooding in 2008, Iowa's overall domestic travel market recorded negative growth in 2009. Total expenditures in the state were down 5.5 percent from 2008 to nearly \$6.1 billion (in current dollars).

The softer conditions in the travel market were further emphasized by the effects rendered by gasoline prices that reverted to a much lower level in 2009 as compared to 2008. As a result of the lower gas prices, the state's 2009 domestic travel spending on the auto transportation sector dropped 14.1 percent while the public transportation sector fell 10.1 percent.

Domestic travel-generated employees in Iowa earned close to \$1.1 billion in payroll income during 2009, down 3.1 percent from 2008.

Domestic traveler expenditures directly generated 63,100 jobs within Iowa in 2009, a decrease of 2.3 percent from 2008. These jobs generated by domestic travel spending in Iowa comprised 4.3 percent of total state non-agricultural employment in 2009.

On average, every \$95,963 spent by domestic travelers in Iowa during 2009 generated one job.

Domestic travel spending in Iowa directly generated \$762.9 million in federal, state and local tax revenue in 2009, down by 0.9 percent from 2008.

Polk County, which includes the city of Des Moines, generated close to \$1.4 billion in domestic travel expenditures to lead all Iowa counties.

Twelve of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2009.

One thousand or more jobs were directly supported by domestic travel expenditures in 2009 in these 12 counties.

TRAVEL IMPACT ON THE U.S. ECONOMY IN 2009

The United States economy in 2009 reached its most precarious condition since the Great Depression of the 1930's, with real GDP in chained 2005 dollars dropping 2.6 percent over 2008, the lowest annual rate of GDP growth since 2000, and nominal GDP decreasing 1.7 percent from 2008. The U.S. economy shrank in the first half of the year in 2009; however the economy began to show signs of improvement in the second half. The GDP in chained 2005 dollars increased 1.6 percent in the third quarter and 5.0 percent in the fourth quarter. Travel industry in the U.S. was dramatically hit by the recession during 2009. Measured in current dollars, total direct travel expenditures in the U.S. decreased 8.8 percent to \$704.4 billion – a loss of over \$68 billion in one year. This sharp decline was largely driven by both decreased travel volume and falling travel-related prices.

The national unemployment rate jumped to 9.3 percent in 2009, the highest level since 2000. Total U.S. non-farm employment decreased 4.3 percent from 2008 to 103.1 million. Compared with 2008, travel industry employment was down 4.2 percent.

The Consumer Price Index (CPI), an indicator of the level of price inflation, was down 0.4 percent in 2009, while the U.S. Travel Association's Travel Price Index (TPI) decreased 6.3 percent during the same period. The falling prices on motor fuel, airline fares, and lodging away from home were the major factors causing a dramatic decrease in the Travel Price Index.

Most economists forecast that real GDP will increase from 3.0 to 3.5 percent in 2010. Many research organizations believe that the unemployment rate will remain above 9 percent during the whole year of 2010. The U.S. Travel Association expects the Consumer Price Index and Travel Price Index to increase 1.7 percent and 0.3 percent, respectively, in 2010. With the anticipated recovery of travel demand, domestic traveler spending is expected to increase 6.2 percent in 2010. Meanwhile nominal GDP is projected to rise about 4.0 percent.

U.S. Travel Volume in 2009

Compared with 2008, U.S. domestic travel, including leisure, business, convention and other travel declined 3.2 percent to total 1.9 billion person-trips during 2009. 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. With the improvement of the economy, total domestic person-trips are expected to increase 2.7 percent in 2010.

Domestic leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, declined 2.3 percent in 2009 compared to 2008, totaling close to 1.5 billion person-trips. Leisure travel accounted for 77.3 percent of all U.S. domestic travel in 2009. Domestic leisure travel is projected to rise 2.3 percent in 2010.

Domestic business travel was dramatically affected by a weak economy and other business challenges in 2009. An estimated 432.1 million business person-trips were taken in 2009, a 6.3 percent decline from 2008. Business travel is forecasted to increase 4.4 percent in 2010.

International inbound travelers, including visitors from overseas, Canada and Mexico, made 54.9 million visits to the United States in 2009, down 5.3 percent from 2008. Much deeper declines were seen during the first three quarters of the year (down 14.3%, 6.5% and 3.8%, respectively). International inbound travel to the U.S., however, posted a 2.3 percent increase in the fourth quarter of 2009 and an 11.1 percent increase in the first half of 2010. Total international arrivals for 2010 are forecasted to increase 3.9 percent to 57.0 million.

Travel Expenditures in 2009

Total direct traveler expenditures, including spending of both domestic and international visitors, decreased 8.8 percent to \$704.4 billion (in current or nominal dollars) in 2009 – a loss of nearly \$68 billion in one year. During 2009, leisure traveler spending decreased 7.3 percent while business traveler spending was down 12.2 percent. Business travel, including travel for meetings/conventions and other business purposes, was more negatively affected than leisure travel in 2009. Declining business revenue, higher rates of unemployment, changes in corporate travel policies, technological advances that offer alternatives to travel and other political concerns all combined to make business travel – and especially meeting/events-related travel - the most vulnerable sector in the U.S. travel industry in 2009. Spending by meetings/convention travelers declined 14.8 percent in 2009.

Domestic travel expenditures in 2009 (current dollars) dropped for the first time since 2002 to a total of \$610.2 billion, a 7.9 percent decline from 2008. This decrease reflects a deflation in travel prices, especially in the cost of gasoline, as well as the declines in travel volume and changes in the trips that were taken (e.g., traveling closer to home, spending less at the destination). Domestic travel expenditures will grow in 2010, now forecasted to be up 6.2 percent as compared to 2009 and totaling \$647.9 billion.

In 2009, discouraged by the global economic recession, international traveler expenditures occurring in the U.S. dropped 14.4 percent from 2008, totaling \$94.2 billion. Even with the decline, the travel industry generated a \$20.7 billion trade surplus for the U.S. in 2009.

Table 1: Travel Expenditures in the U.S. 2008 and 2009

<u>Industry Sector</u>	2008 Travel Spending in The U.S. (\$ Billions)	2009p Travel Spending in The U.S. (\$ Billions)	% 2009p/2008 Travel Spending in The U.S. (Percent Change)
Public Transportation	\$143.9	\$124.6	-13.4%
Auto Transportation	137.5	113.2	-17.7%
Lodging	145.7	126.6	-13.1%
Foodservice	182.1	179.4	-1.5%
Entertainment/Recreation	84.4	82.9	-1.8%
<u>General Retail</u>	78.9	77.7	-1.5%
Total	\$772.5	\$704.4	-8.8%
International*	\$110.1	\$94.2	-14.4%
Domestic	\$662.4	\$610.2	-7.9%

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



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

Domestic and international traveler expenditures in the U.S. directly generated nearly 7.4 million jobs in 2009, down 4.2 percent from 2008 and accounted for 5.6 percent of total non-farm employment in the U.S.

Affected by the economic recession, the employment situation in the U.S. has been deteriorating. The nation's unemployment rate hit 9.3 percent in 2009 and it is expected to remain at a similar level in 2010. Employment in the travel industry, however, is expected to increase 1.2 percent in 2010, after losing nearly 326,000 jobs in 2009, based on the U.S. Travel Association's forecast.

Table 2: Travel-Generated Employment in the U.S., 2008 and 2009

<u>Industry Sector</u>	2008 Travel-Generated Employment (Thousands)	2009 Travel-Generated Employment (Thousands)	2009 Percent Change Over 2008 (%)
Public Transportation	1,003.0	949.1	-5.4%
Auto Transportation	263.0	253.0	-3.8%
Lodging	1,497.6	1,402.4	-6.4%
Foodservice	2,996.2	2,892.2	-3.5%
Entertainment/Recreation	1,298.8	1,265.8	-2.5%
General Retail	485.7	467.3	-3.8%
<u>Travel Planning</u>	175.1	163.8	-6.5%
Total	7,719.4	7,393.6	-4.2%
International*	1,010.2	893.6	-11.5%
Domestic	6,709.2	6,500.0	-3.1%

Sources: U.S. Travel Association, BLS

P: preliminary

* Excludes jobs generated by international passenger fare payments.

Table 3: Overall U.S. Economic Developments, 2007-2009

<u>Sector</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Nominal gross domestic product (\$ Billions)	\$14,061.8	\$14,369.1	\$14,119.0
Real gross domestic product (\$ Billions)*	\$13,228.9	\$13,228.8	\$12,880.6
Real disposable personal income (\$Billions)*	\$9,874.2	\$10,042.9	\$10,099.8
Real personal consumption expenditures (\$ Billions)*	\$9,289.5	\$9,265.0	\$9,153.9
Consumer price index**	207.3	215.3	214.5
Travel Price Index**	244.0	257.7	241.5
Non-farm payroll employment (Millions)	137.6	136.8	130.9
Unemployment rate (%)	4.6	5.8	9.3

Percentage change from previous year

Nominal gross domestic product	4.9%	2.2%	-1.7%
Real gross domestic product	1.9%	0.0%	-2.6%
Real disposable personal income	2.3%	1.7%	0.6%
Real personal consumption expenditures	2.4%	-0.3%	-1.2%
Consumer price index	2.8%	3.9%	-0.4%
Travel Price Index	4.5%	5.6%	-6.3%
Non-farm payroll employment	1.1%	-0.6%	-4.3%

Sources: BEA, BLS, and U.S. Travel Association

* Chained 2005 dollars

** Base period: 1982-84=100

Table 4: U.S. Travel Trends, 2005-2009

<u>Category</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Total travel expenditures (\$ billions)	\$653.7	\$695.7	\$738.0	\$772.5	\$704.4
<i>U.S. travelers' expenditures (\$ billions)</i>	\$572.0	\$610.0	\$641.3	\$662.4	\$610.2
<i>International travelers' expenditures In the U.S.* (\$ billions)</i>	\$81.7	\$85.7	\$96.7	\$110.1	\$94.2
Travel price index**	222.6	233.5	244.0	215.3	214.5
Travel-generated employment*** (thousands)	7,508.8	7,550.5	7,699.9	7,719.4	7,393.6
Percentage change from previous year					
Total travel expenditures	7.7%	6.4%	6.1%	4.7%	-8.8%
<i>U.S. travelers' expenditures</i>	7.5%	6.6%	5.1%	3.3%	-7.9%
<i>International travelers' expenditures in the U.S.</i>	9.6%	4.9%	12.9%	13.8%	-14.4%
Travel price index	17.8%	4.9%	4.5%	-11.8%	-0.4%
Travel-generated employment	0.8%	0.6%	2.0%	0.3%	-4.2%

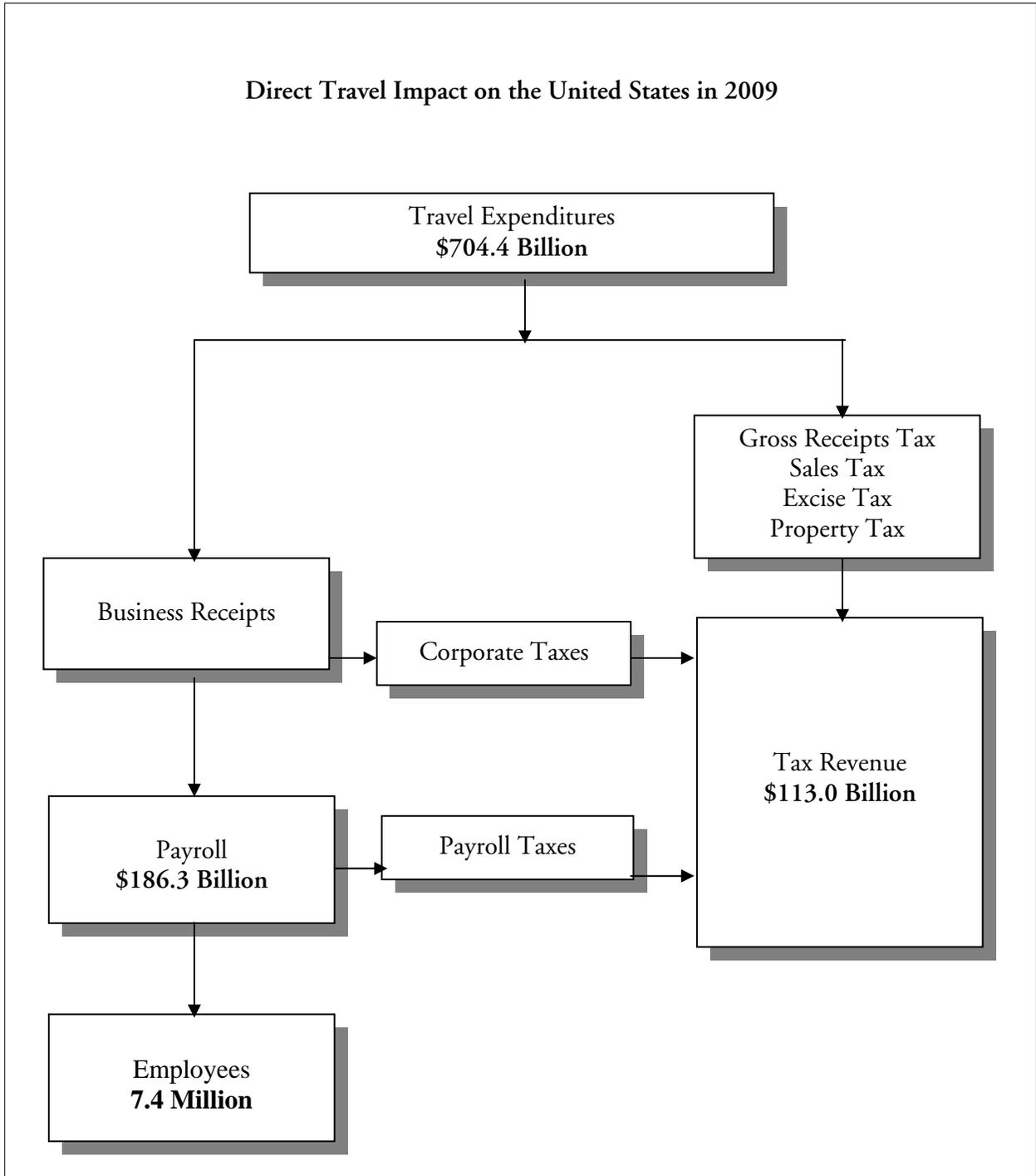
Sources: U.S. Travel Association, BEA, BLS.

P: preliminary

* Does not include international passenger fare payments..

** Base period: 1982-84=100.

***Includes employment generated by both domestic and international traveler expenditures.



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

DOMESTIC TRAVEL IMPACT ON IOWA - 2009

Travel Expenditures

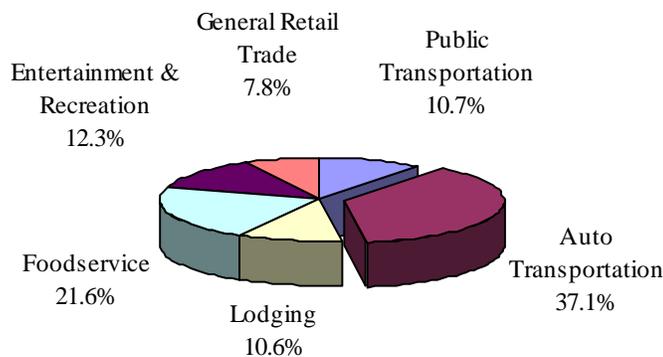
Despite the anticipated recovery following the massive flooding in 2008, Iowa's overall domestic travel market recorded a decline in 2009. Total expenditures in the state were down 5.5 percent from 2008 to nearly \$6.1 billion (in current dollars).

The state's 2009 domestic travel spending on the auto transportation sector dropped 14.1 percent, while the public transportation sector fell 10.1 percent. The decrease observed in these two areas was mainly driven by declines in gasoline prices in 2009 as compared to 2008.

Total spending on domestic travel and tourism-related accommodation increased 3.3 percent to \$642.4 million. The foodservice sector, which accounts for 21.6 percent of the total domestic travel spending in the state, rose 4.9 percent totaling more than \$1.3 billion.

The entertainment & recreation sector reflected a 0.6 percent decline in spending to \$741.9 million, while the general retail trade sector showed a 2.6 percent increase to \$470.2 million.

Domestic Travel Spending in Iowa in 2009 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.
-

Table 5: Domestic Travel Expenditures in Iowa by Industry Sector, 2008-2009

<i>2009 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
Public Transportation	\$647.5	10.7%
Auto Transportation	2,246.5	37.1%
Lodging	642.4	10.6%
Foodservice	1,307.1	21.6%
Entertainment & Recreation	741.9	12.3%
General Retail Trade	470.2	7.8%
Total	\$6,055.6	100.0%
<i>2008 Travel Expenditures</i>		
Public Transportation	\$720.3	11.2%
Auto Transportation	2,614.2	40.8%
Lodging	621.7	9.7%
Foodservice	1,246.0	19.4%
Entertainment & Recreation	746.4	11.7%
General Retail Trade	458.2	7.2%
Total	\$6,406.7	100.0%
<i>Percent Change 2009 over 2008</i>		
Public Transportation	-10.1%	
Auto Transportation	-14.1%	
Lodging	3.3%	
Foodservice	4.9%	
Entertainment & Recreation	-0.6%	
General Retail Trade	2.6%	
Total	-5.5%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA – 2009

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.

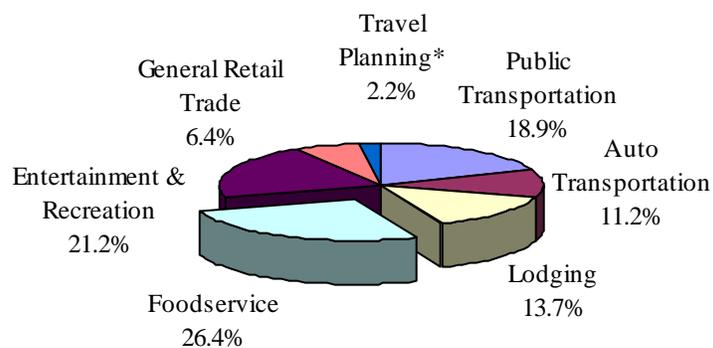
Payroll income generated by domestic travelers in Iowa reached almost \$1.1 billion in 2009, down 3.1 percent from 2008.

On the average, every dollar spent by domestic travelers produced 17.9 cents in payroll income for Iowa residents in 2009.

The foodservice sector, which posted the highest share of payroll (26.4%) among the seven industry sectors investigated in this report, declined 3.2 percent from 2008 to \$285.0 million.

Entertainment and recreation, the state's second largest payroll category (21.2%), decreased 2.6 percent from 2008 to \$229.2 million.

**Domestic Travel-Generated Payroll in Iowa in 2009
by Industry Sector**



Source: U.S. Travel Association

Travel-Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2008-2009

<i>2009 Payroll</i>	<u>Total (\$ Millions)</u>	<u>% of Total (Percent)</u>
Public Transportation	\$204.1	18.9%
Auto Transportation	121.2	11.2%
Lodging	148.6	13.7%
Foodservice	285.0	26.4%
Entertainment & Recreation	229.2	21.2%
General Retail Trade	68.8	6.4%
Travel Planning*	24.1	2.2%
Total	\$1,080.9	100.0%
<i>2008 Payroll</i>		
Public Transportation	\$208.8	18.7%
Auto Transportation	122.7	11.0%
Lodging	163.0	14.6%
Foodservice	294.5	26.4%
Entertainment & Recreation	235.2	21.1%
General Retail Trade	67.7	6.1%
Travel Planning*	24.0	2.1%
Total	\$1,115.9	100.0%
<i>Percent Change 2009 over 2008</i>		
Public Transportation	-2.3%	
Auto Transportation	-1.2%	
Lodging	-8.8%	
Foodservice	-3.2%	
Entertainment & Recreation	-2.6%	
General Retail Trade	1.6%	
Travel Planning*	0.3%	
Total	-3.1%	

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.

DOMESTIC TRAVEL IMPACT ON IOWA - 2009

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. A weaker job market appears to have persisted in Iowa in 2009. Including full-time and seasonal/part-time positions, the state's domestic travel-generated jobs declined 2.3 percent from 2008 to 63,100.

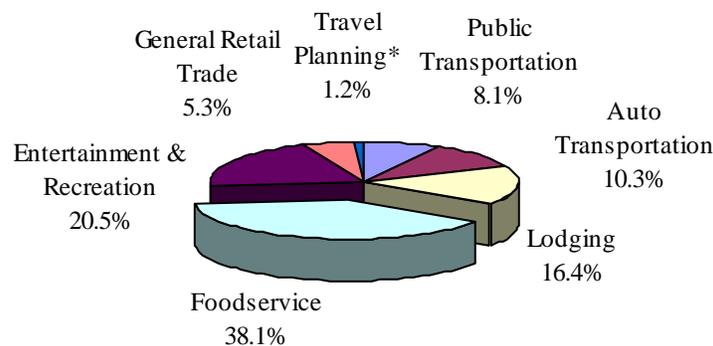
On the average, every \$95,963 spent by domestic travelers in Iowa directly supported one job.

The 63,100 jobs generated by domestic travel in Iowa comprised 4.3 percent of state's total non-agricultural employment during 2009. Without these jobs generated by domestic travel, Iowa's 2009 unemployment rate of 6.0 percent would have been 3.7 percentage points higher, or 9.7 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 in Iowa during 2009, generating 24,100 jobs, or 38.1 percent of the state total. Employment in this industry decreased 1.5 percent from 2008.

Employment generated by domestic in travel planning sector dropped 6.0 percent, the largest decrease among all categories in 2009.

**Domestic Travel-Generated Employment in Iowa in 2009
by Industry Sector**



Travel-Generated Employment

Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2008-2009

<i>2009 Employment</i>	<u>Total (Thousand)</u>	<u>% of Total (Percent)</u>
Public Transportation	5.1	8.1%
Auto Transportation	6.5	10.3%
Lodging	10.4	16.4%
Foodservice	24.1	38.1%
Entertainment & Recreation	12.9	20.5%
General Retail Trade	3.4	5.3%
Travel Planning*	0.8	1.2%
Total	63.1	100.0%
<i>2008 Employment</i>		
Public Transportation	5.3	8.2%
Auto Transportation	6.6	10.3%
Lodging	10.8	16.7%
Foodservice	24.4	37.8%
Entertainment & Recreation	13.3	20.5%
General Retail Trade	3.4	5.2%
Travel Planning*	0.8	1.3%
Total	64.6	100.0%
<i>Percent Change 2009 over 2008</i>		
Public Transportation	-3.7%	
Auto Transportation	-1.4%	
Lodging	-4.0%	
Foodservice	-1.5%	
Entertainment & Recreation	-2.6%	
General Retail Trade	-0.2%	
Travel Planning*	-6.0%	
Total	-2.3%	

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.

DOMESTIC TRAVEL IMPACT ON IOWA - 2009

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.

Total tax revenues directly generated by domestic traveler spending in Iowa slightly fell 0.9 percent from 2008 to a total of \$762.9 million. The federal government collected a total of \$358.1 million from domestic traveler spending, representing a decrease of 4.7 percent. Tax collections by the federal government account for 46.9 percent of all travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.9 cents for federal tax coffers.

Tax revenue from domestic traveler spending for Iowa's state treasury rose 3.1 percent to a total of \$312.6 million. This increase is attributed to the increase in sales tax rate effective July 1, 2008, meaning the first half of the base year 2008 still collected sales taxes based on the lower rate. State government comprises 41.0 percent of all travel-generated tax revenue for 2009 collected in the state. On average, each travel dollar produced 5.2 cents in state tax receipts.

Taxes collected by the local governments (counties and cities) were 1.9 percent higher than in 2008 to a total of \$92.2 million, mainly due to higher collections in property and local taxes. Each travel dollar produced 1.5 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in Iowa in 2009
by Level of Government**

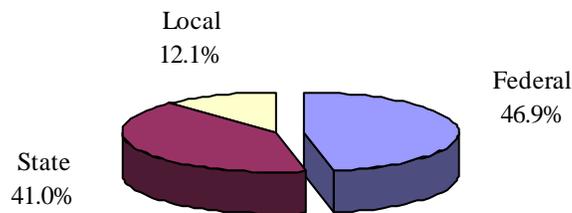


Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2008-2009

<i>2009 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$358.1	46.9%
State	312.6	41.0%
Local	92.2	12.1%
Total	\$762.9	100.0%
<i>2008 Tax Revenue</i>		
Federal	\$375.9	48.8%
State	303.2	39.4%
Local	90.6	11.8%
Total	\$769.7	100.0%
<i>Percent Change 2009 over 2008</i>		
Federal	-4.7%	
State	3.1%	
Local	1.9%	
Total	-0.9%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES - 2009

Despite the anticipated recovery following the massive flooding in 2008, Iowa's overall domestic travel market declined in 2009. Total expenditures in the state were down 5.5 percent from 2008 to nearly \$6.1 billion (in current dollars).

The softer conditions in the travel market were further exacerbated by the effects rendered by gasoline prices that fell substantially from 2008 levels. The state's 2009 domestic travel spending on the auto transportation sector dropped 14.1 percent, while the public transportation sector fell 10.1 percent.

Domestic travel expenditures directly generated almost \$1.1 billion in payroll income and 63,100 jobs for Iowa residents. The federal government received \$358.1 million in tax revenue through the travel industry in Iowa in 2009. Additionally, domestic expenditures generated \$312.6 million in tax revenue for the state treasury and \$92.2 million tax revenue for local governments during 2009.

Travel expenditures occurred in all 99 Iowa counties. The top five counties in Iowa received nearly \$3.0 billion in direct domestic travel expenditures, accounting for nearly half of the state total (49.2 percent). Domestic travel spending in the top five counties generated \$571.7 million in payroll (52.9 percent of the state total) and 32,600 jobs (51.7 percent of the state total) in 2009.

DOMESTIC TRAVEL IMPACT IN TOP 5 COUNTIES

Polk County, including the city of Des Moines, led all counties in domestic travel expenditures, payroll income and jobs directly generated by these expenditures in 2009. Domestic travel expenditures in Polk County reached close to \$1.4 billion, accounting for 23.0 percent of the state total. These expenditures generated nearly \$280.6 million in payroll income and 15,000 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$562.6 million in domestic travel spending in 2009, representing 9.3 percent of the state total. Payroll income and jobs directly attributed to domestic travel spending totaled \$110.0 million and nearly 5,800 jobs.

Scott County posted close to \$471.6 million in domestic expenditures to rank third. These expenditures generated \$82.3 million in payroll as well as 5,700 jobs within the county.

Johnson County ranked fourth with \$292.3 million in domestic travel expenditures. These travel expenditures benefited county residents with more than \$49.6 million in payroll income and 3,400 jobs.

Black Hawk County surpassed Dubuque County in 2009 to rank the fifth by travel spending in 2009. Domestic travelers spent \$264.7 million in the county, up 4.4 percent from 2008. These travel expenditures benefited county residents with \$49.1 million in payroll income and more than 2,700 jobs.

Domestic Travel Impact on Iowa - Top 5 Counties

2009 Domestic Travel Impact on Iowa

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2008-2009

2009 Travel Impact

<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>
POLK	\$1,390.78	\$280.60	14.97	\$64.01	\$23.87
LINN	562.61	110.00	5.79	25.80	9.30
SCOTT	471.56	82.32	5.72	25.92	7.67
JOHNSON	292.31	49.64	3.40	14.31	4.79
BLACK HAWK	264.70	49.11	2.73	12.44	3.83
FIVE COUNTY TOTAL	\$2,981.96	\$571.67	32.60	\$142.48	\$49.47
STATE TOTALS	\$6,055.57	\$1,080.92	63.10	\$312.60	\$92.23
FIVE COUNTY SHARE	49.24%	52.89%	51.66%	45.58%	53.63%

2008 Travel Impact

POLK	\$1,479.82	\$291.36	15.41	\$62.39	\$23.56
LINN	590.39	112.65	5.88	24.81	9.05
SCOTT	497.77	84.80	5.85	25.07	7.51
JOHNSON	306.43	50.79	3.45	13.74	4.66
BLACK HAWK	275.44	49.87	2.75	11.86	3.70
FIVE COUNTY TOTAL	\$3,149.86	\$589.47	33.33	\$137.87	\$48.47
STATE TOTALS	\$6,406.73	\$1,115.94	64.60	\$303.22	\$90.55
FIVE COUNTY SHARE	49.16%	52.82%	51.60%	45.47%	53.53%

Percent Change

2009 over 2008

POLK	-6.02%	-3.69%	-2.90%	2.59%	1.34%
LINN	-4.71%	-2.35%	-1.55%	4.02%	2.75%
SCOTT	-5.27%	-2.92%	-2.13%	3.41%	2.15%
JOHNSON	-4.61%	-2.25%	-1.45%	4.12%	2.85%
BLACK HAWK	4.35%	11.07%	2.22%	7.14%	14.23%
FIVE COUNTY TOTAL	-5.33%	-3.02%	-2.20%	3.34%	2.05%
STATE TOTALS	-5.48%	-3.14%	-2.31%	3.09%	1.85%

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 2009 and 2008 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2009 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 2009 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2009.

Table D shows the percent change in 2009 over 2008 estimates for each of the measures of economic impact.

Table E shows the counties listed alphabetically, with 2008 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical by County, 2009

2009 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2009					
<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	\$12.36	\$1.32	0.09	\$0.55	\$0.09
ADAMS	2.21	0.29	0.02	0.15	0.03
ALLAMAKEE	29.99	3.42	0.20	1.69	0.80
APPANOOSE	13.57	1.90	0.12	0.83	0.20
AUDUBON	3.94	0.46	0.02	0.30	0.05
BENTON	14.51	1.60	0.10	1.07	0.11
BLACK HAWK	264.70	49.11	2.73	12.44	3.83
BOONE	19.53	2.62	0.15	1.28	0.18
BREMER	42.30	6.21	0.45	2.33	0.33
BUCHANAN	21.04	2.54	0.14	1.36	0.26
BUENA VISTA	23.64	3.39	0.20	1.30	0.23
BUTLER	6.82	0.63	0.03	0.50	0.04
CALHOUN	8.32	1.12	0.06	0.59	0.24
CARROLL	44.87	6.76	0.46	2.57	0.38
CASS	20.75	2.60	0.16	1.27	0.15
CEDAR	17.29	2.34	0.14	1.24	0.25
CERRO GORDO	152.02	24.53	1.51	7.82	2.68
CHEROKEE	12.25	2.06	0.13	0.93	0.12
CHICKASAW	8.18	1.43	0.10	0.58	0.10
CLARKE	18.02	2.49	0.17	1.07	0.16
CLAY	75.89	18.92	0.69	2.00	1.05
CLAYTON	25.17	4.16	0.25	1.48	0.54
CLINTON	91.77	15.51	0.97	5.00	1.26
CRAWFORD	16.29	2.87	0.18	1.10	0.16
DALLAS	128.89	21.40	1.45	6.64	1.15
DAVIS	5.20	0.62	0.04	0.31	0.07
DECATUR	10.36	1.08	0.07	0.54	0.10

Table A: Alphabetical by County, 2009

2009 Domestic Travel Impact on Iowa Table A: Alphabetical by County, 2009 (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	6.54	0.77	0.04	0.41	0.08
DES MOINES	93.61	18.63	0.92	4.18	1.40
DICKINSON	196.88	27.88	1.80	11.69	3.75
DUBUQUE	254.03	45.38	2.76	12.69	3.62
EMMET	8.88	1.37	0.07	0.58	0.12
FAYETTE	13.15	1.60	0.09	0.80	0.12
FLOYD	14.65	2.60	0.12	0.82	0.15
FRANKLIN	9.58	1.16	0.07	0.63	0.07
FREMONT	11.61	1.80	0.12	0.70	0.11
GREENE	4.88	0.64	0.03	0.32	0.07
GRUNDY	4.06	0.64	0.04	0.32	0.04
GUTHRIE	10.06	1.67	0.09	0.92	0.28
HAMILTON	19.23	2.84	0.19	1.14	0.17
HANCOCK	5.05	0.87	0.04	0.33	0.09
HARDIN	16.30	1.82	0.10	0.82	0.13
HARRISON	22.55	3.15	0.23	1.31	0.17
HENRY	17.04	2.79	0.16	0.93	0.25
HOWARD	3.64	0.49	0.03	0.23	0.04
HUMBOLDT	9.18	1.63	0.07	0.36	0.11
IDA	5.04	0.73	0.05	0.37	0.06
IOWA	37.51	6.94	0.48	2.34	0.62
JACKSON	22.34	3.38	0.20	1.44	0.51
JASPER	59.31	8.51	0.54	3.02	0.81
JEFFERSON	32.01	5.30	0.36	1.62	0.28
JOHNSON	292.31	49.64	3.40	14.31	4.79
JONES	16.17	1.86	0.10	1.09	0.13
KEOKUK	3.89	0.42	0.02	0.24	0.05

Table A: Alphabetical by County, 2009

2009 Domestic Travel Impact on Iowa Table A: Alphabetical by County, 2009 (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	12.50	1.58	0.10	0.78	0.10
LEE	51.87	8.80	0.55	2.94	0.75
LINN	562.61	110.00	5.79	25.80	9.30
LOUISA	11.07	1.68	0.10	0.88	0.31
LUCAS	6.10	0.81	0.05	0.35	0.07
LYON	5.34	0.62	0.03	0.36	0.05
MADISON	10.25	1.06	0.06	0.67	0.11
MAHASKA	14.90	3.16	0.19	1.24	0.25
MARION	35.99	5.19	0.33	2.01	0.32
MARSHALL	65.49	11.08	0.66	3.53	0.90
MILLS	6.03	0.82	0.06	0.51	0.06
MITCHELL	7.86	0.90	0.05	0.44	0.08
MONONA	17.36	3.59	0.20	0.95	0.23
MONROE	6.86	1.36	0.09	0.53	0.09
MONTGOMERY	16.33	3.22	0.22	1.29	0.19
MUSCATINE	60.14	10.32	0.66	3.47	0.72
O'BRIEN	16.79	2.31	0.14	1.02	0.14
OSCEOLA	2.93	0.43	0.03	0.18	0.03
PAGE	14.08	1.62	0.10	0.85	0.13
PALO ALTO	27.91	4.37	0.25	1.76	0.57
PLYMOUTH	17.78	2.37	0.14	1.15	0.14
POCAHONTAS	3.58	0.46	0.03	0.23	0.04
POLK	1,390.78	280.60	14.97	64.01	23.87
POTTAWATTAMIE	243.28	50.84	3.21	14.51	3.96
POWESHIEK	35.98	5.25	0.31	2.25	0.78
RINGGOLD	7.75	0.86	0.04	0.54	0.17
SAC	11.79	1.32	0.07	0.74	0.26

Table A: Alphabetical by County, 2009

2009 Domestic Travel Impact on Iowa Table A: Alphabetical by County, 2009 (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	471.56	82.32	5.72	25.92	7.67
SHELBY	11.66	1.48	0.09	0.71	0.12
SIOUX	27.00	3.78	0.22	1.60	0.21
STORY	149.28	24.13	1.49	7.30	2.07
TAMA	16.70	3.02	0.18	0.95	0.20
TAYLOR	2.74	0.31	0.02	0.22	0.03
UNION	12.24	1.83	0.12	0.86	0.15
VAN BUREN	4.96	0.75	0.05	0.36	0.07
WAPELLO	61.62	9.00	0.55	3.54	0.84
WARREN	26.29	2.77	0.18	1.52	0.24
WASHINGTON	13.02	1.71	0.11	0.80	0.11
WAYNE	5.26	0.75	0.05	0.44	0.09
WEBSTER	51.42	9.49	0.54	2.90	0.51
WINNEBAGO	9.07	0.99	0.06	0.59	0.08
WINNESHIEK	23.21	4.39	0.31	1.46	0.25
WOODBURY	208.18	41.53	2.07	8.79	3.15
WORTH	4.79	0.39	0.02	0.29	0.03
WRIGHT	13.82	1.77	0.09	0.83	0.24
TOTAL	\$6,055.57	\$1,080.92	63.10	\$312.60	\$92.23

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Table B: Ranking of Counties by Expenditure Levels, 2009

2009 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2009					
<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	\$1,390.78	\$280.60	14.97	\$64.01	\$23.87
LINN	562.61	110.00	5.79	25.80	9.30
SCOTT	471.56	82.32	5.72	25.92	7.67
JOHNSON	292.31	49.64	3.40	14.31	4.79
BLACK HAWK	264.70	49.11	2.73	12.44	3.83
DUBUQUE	254.03	45.38	2.76	12.69	3.62
POTTAWATTAMIE	243.28	50.84	3.21	14.51	3.96
WOODBURY	208.18	41.53	2.07	8.79	3.15
DICKINSON	196.88	27.88	1.80	11.69	3.75
CERRO GORDO	152.02	24.53	1.51	7.82	2.68
STORY	149.28	24.13	1.49	7.30	2.07
DALLAS	128.89	21.40	1.45	6.64	1.15
DES MOINES	93.61	18.63	0.92	4.18	1.40
CLINTON	91.77	15.51	0.97	5.00	1.26
CLAY	75.89	18.92	0.69	2.00	1.05
MARSHALL	65.49	11.08	0.66	3.53	0.90
WAPELLO	61.62	9.00	0.55	3.54	0.84
MUSCATINE	60.14	10.32	0.66	3.47	0.72
JASPER	59.31	8.51	0.54	3.02	0.81
LEE	51.87	8.80	0.55	2.94	0.75
WEBSTER	51.42	9.49	0.54	2.90	0.51
CARROLL	44.87	6.76	0.46	2.57	0.38
BREMER	42.30	6.21	0.45	2.33	0.33
IOWA	37.51	6.94	0.48	2.34	0.62
MARION	35.99	5.19	0.33	2.01	0.32
POWESHIEK	35.98	5.25	0.31	2.25	0.78
JEFFERSON	32.01	5.30	0.36	1.62	0.28

Table B: Ranking of Counties by Expenditure Levels, 2009

2009 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2009 (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	29.99	3.42	0.20	1.69	0.80	
PALO ALTO	27.91	4.37	0.25	1.76	0.57	
SIOUX	27.00	3.78	0.22	1.60	0.21	
WARREN	26.29	2.77	0.18	1.52	0.24	
CLAYTON	25.17	4.16	0.25	1.48	0.54	
BUENA VISTA	23.64	3.39	0.20	1.30	0.23	
WINNESHIEK	23.21	4.39	0.31	1.46	0.25	
HARRISON	22.55	3.15	0.23	1.31	0.17	
JACKSON	22.34	3.38	0.20	1.44	0.51	
BUCHANAN	21.04	2.54	0.14	1.36	0.26	
CASS	20.75	2.60	0.16	1.27	0.15	
BOONE	19.53	2.62	0.15	1.28	0.18	
HAMILTON	19.23	2.84	0.19	1.14	0.17	
CLARKE	18.02	2.49	0.17	1.07	0.16	
PLYMOUTH	17.78	2.37	0.14	1.15	0.14	
MONONA	17.36	3.59	0.20	0.95	0.23	
CEDAR	17.29	2.34	0.14	1.24	0.25	
HENRY	17.04	2.79	0.16	0.93	0.25	
O'BRIEN	16.79	2.31	0.14	1.02	0.14	
TAMA	16.70	3.02	0.18	0.95	0.20	
MONTGOMERY	16.33	3.22	0.22	1.29	0.19	
HARDIN	16.30	1.82	0.10	0.82	0.13	
CRAWFORD	16.29	2.87	0.18	1.10	0.16	
JONES	16.17	1.86	0.10	1.09	0.13	
MAHASKA	14.90	3.16	0.19	1.24	0.25	
FLOYD	14.65	2.60	0.12	0.82	0.15	
BENTON	14.51	1.60	0.10	1.07	0.11	

Table B: Ranking of Counties by Expenditure Levels, 2009

2009 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2009 (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	14.08	1.62	0.10	0.85	0.13	
WRIGHT	13.82	1.77	0.09	0.83	0.24	
APPANOOSE	13.57	1.90	0.12	0.83	0.20	
FAYETTE	13.15	1.60	0.09	0.80	0.12	
WASHINGTON	13.02	1.71	0.11	0.80	0.11	
KOSSUTH	12.50	1.58	0.10	0.78	0.10	
ADAIR	12.36	1.32	0.09	0.55	0.09	
CHEROKEE	12.25	2.06	0.13	0.93	0.12	
UNION	12.24	1.83	0.12	0.86	0.15	
SAC	11.79	1.32	0.07	0.74	0.26	
SHELBY	11.66	1.48	0.09	0.71	0.12	
FREMONT	11.61	1.80	0.12	0.70	0.11	
LOUISA	11.07	1.68	0.10	0.88	0.31	
DECATUR	10.36	1.08	0.07	0.54	0.10	
MADISON	10.25	1.06	0.06	0.67	0.11	
GUTHRIE	10.06	1.67	0.09	0.92	0.28	
FRANKLIN	9.58	1.16	0.07	0.63	0.07	
HUMBOLDT	9.18	1.63	0.07	0.36	0.11	
WINNEBAGO	9.07	0.99	0.06	0.59	0.08	
EMMET	8.88	1.37	0.07	0.58	0.12	
CALHOUN	8.32	1.12	0.06	0.59	0.24	
CHICKASAW	8.18	1.43	0.10	0.58	0.10	
MITCHELL	7.86	0.90	0.05	0.44	0.08	
RINGGOLD	7.75	0.86	0.04	0.54	0.17	
MONROE	6.86	1.36	0.09	0.53	0.09	
BUTLER	6.82	0.63	0.03	0.50	0.04	
DELAWARE	6.54	0.77	0.04	0.41	0.08	

Table B: Ranking of Counties by Expenditure Levels, 2009

2009 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2009 (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>	
LUCAS	6.10	0.81	0.05	0.35	0.07	
MILLS	6.03	0.82	0.06	0.51	0.06	
LYON	5.34	0.62	0.03	0.36	0.05	
WAYNE	5.26	0.75	0.05	0.44	0.09	
DAVIS	5.20	0.62	0.04	0.31	0.07	
HANCOCK	5.05	0.87	0.04	0.33	0.09	
IDA	5.04	0.73	0.05	0.37	0.06	
VAN BUREN	4.96	0.75	0.05	0.36	0.07	
GREENE	4.88	0.64	0.03	0.32	0.07	
WORTH	4.79	0.39	0.02	0.29	0.03	
GRUNDY	4.06	0.64	0.04	0.32	0.04	
AUDUBON	3.94	0.46	0.02	0.30	0.05	
KEOKUK	3.89	0.42	0.02	0.24	0.05	
HOWARD	3.64	0.49	0.03	0.23	0.04	
POCAHONTAS	3.58	0.46	0.03	0.23	0.04	
OSCEOLA	2.93	0.43	0.03	0.18	0.03	
TAYLOR	2.74	0.31	0.02	0.22	0.03	
ADAMS	2.21	0.29	0.02	0.15	0.03	
TOTAL	\$6,055.57	\$1,080.92	63.10	\$312.60	\$92.23	

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Table C: Percent Distribution by County, 2009

2009 Domestic Travel Impact on Iowa Table C: Percent Distribution by County, 2009					
<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%	0.18%	0.10%
ADAMS	0.04%	0.03%	0.03%	0.05%	0.03%
ALLAMAKEE	0.50%	0.32%	0.31%	0.54%	0.86%
APPANOOSE	0.22%	0.18%	0.18%	0.27%	0.22%
AUDUBON	0.07%	0.04%	0.03%	0.10%	0.05%
BENTON	0.24%	0.15%	0.15%	0.34%	0.12%
BLACK HAWK	4.37%	4.54%	4.32%	3.98%	4.15%
BOONE	0.32%	0.24%	0.24%	0.41%	0.19%
BREMER	0.70%	0.57%	0.71%	0.75%	0.36%
BUCHANAN	0.35%	0.24%	0.23%	0.43%	0.28%
BUENA VISTA	0.39%	0.31%	0.32%	0.42%	0.25%
BUTLER	0.11%	0.06%	0.05%	0.16%	0.05%
CALHOUN	0.14%	0.10%	0.10%	0.19%	0.26%
CARROLL	0.74%	0.63%	0.72%	0.82%	0.41%
CASS	0.34%	0.24%	0.25%	0.41%	0.17%
CEDAR	0.29%	0.22%	0.22%	0.40%	0.27%
CERRO GORDO	2.51%	2.27%	2.39%	2.50%	2.90%
CHEROKEE	0.20%	0.19%	0.21%	0.30%	0.13%
CHICKASAW	0.14%	0.13%	0.16%	0.19%	0.11%
CLARKE	0.30%	0.23%	0.27%	0.34%	0.18%
CLAY	1.25%	1.75%	1.09%	0.64%	1.13%
CLAYTON	0.42%	0.39%	0.40%	0.47%	0.59%
CLINTON	1.52%	1.44%	1.54%	1.60%	1.37%
CRAWFORD	0.27%	0.27%	0.28%	0.35%	0.18%
DALLAS	2.13%	1.98%	2.30%	2.12%	1.25%
DAVIS	0.09%	0.06%	0.06%	0.10%	0.07%
DECATUR	0.17%	0.10%	0.11%	0.17%	0.11%

Table C: Percent Distribution by County, 2009

2009 Domestic Travel Impact on Iowa Table C: Percent Distribution by County, 2009 (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	1.55%	1.72%	1.46%	1.34%	1.52%
DICKINSON	3.25%	2.58%	2.86%	3.74%	4.06%
DUBUQUE	4.20%	4.20%	4.38%	4.06%	3.92%
EMMET	0.15%	0.13%	0.11%	0.19%	0.13%
FAYETTE	0.22%	0.15%	0.14%	0.25%	0.13%
FLOYD	0.24%	0.24%	0.19%	0.26%	0.16%
FRANKLIN	0.16%	0.11%	0.11%	0.20%	0.07%
FREMONT	0.19%	0.17%	0.19%	0.22%	0.12%
GREENE	0.08%	0.06%	0.05%	0.10%	0.07%
GRUNDY	0.07%	0.06%	0.06%	0.10%	0.04%
GUTHRIE	0.17%	0.15%	0.14%	0.29%	0.30%
HAMILTON	0.32%	0.26%	0.30%	0.36%	0.19%
HANCOCK	0.08%	0.08%	0.06%	0.11%	0.09%
HARDIN	0.27%	0.17%	0.16%	0.26%	0.14%
HARRISON	0.37%	0.29%	0.36%	0.42%	0.19%
HENRY	0.28%	0.26%	0.26%	0.30%	0.27%
HOWARD	0.06%	0.05%	0.05%	0.07%	0.05%
HUMBOLDT	0.15%	0.15%	0.11%	0.12%	0.12%
IDA	0.08%	0.07%	0.08%	0.12%	0.07%
IOWA	0.62%	0.64%	0.77%	0.75%	0.67%
JACKSON	0.37%	0.31%	0.32%	0.46%	0.56%
JASPER	0.98%	0.79%	0.86%	0.97%	0.87%
JEFFERSON	0.53%	0.49%	0.57%	0.52%	0.31%
JOHNSON	4.83%	4.59%	5.38%	4.58%	5.20%
JONES	0.27%	0.17%	0.16%	0.35%	0.14%
KEOKUK	0.06%	0.04%	0.03%	0.08%	0.05%

Table C: Percent Distribution by County, 2009

2009 Domestic Travel Impact on Iowa						
Table C: Percent Distribution by County, 2009 (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%	0.15%	0.16%	0.25%	0.11%	
LEE	0.86%	0.81%	0.87%	0.94%	0.82%	
LINN	9.29%	10.18%	9.17%	8.25%	10.08%	
LOUISA	0.18%	0.16%	0.16%	0.28%	0.33%	
LUCAS	0.10%	0.08%	0.08%	0.11%	0.08%	
LYON	0.09%	0.06%	0.06%	0.12%	0.06%	
MADISON	0.17%	0.10%	0.10%	0.22%	0.12%	
MAHASKA	0.25%	0.29%	0.30%	0.40%	0.27%	
MARION	0.59%	0.48%	0.52%	0.64%	0.35%	
MARSHALL	1.08%	1.02%	1.05%	1.13%	0.98%	
MILLS	0.10%	0.08%	0.09%	0.16%	0.07%	
MITCHELL	0.13%	0.08%	0.09%	0.14%	0.09%	
MONONA	0.29%	0.33%	0.32%	0.30%	0.25%	
MONROE	0.11%	0.13%	0.15%	0.17%	0.10%	
MONTGOMERY	0.27%	0.30%	0.34%	0.41%	0.21%	
MUSCATINE	0.99%	0.95%	1.05%	1.11%	0.78%	
O'BRIEN	0.28%	0.21%	0.23%	0.33%	0.15%	
OSCEOLA	0.05%	0.04%	0.05%	0.06%	0.03%	
PAGE	0.23%	0.15%	0.16%	0.27%	0.14%	
PALO ALTO	0.46%	0.40%	0.40%	0.56%	0.62%	
PLYMOUTH	0.29%	0.22%	0.22%	0.37%	0.16%	
POCAHONTAS	0.06%	0.04%	0.05%	0.07%	0.05%	
POLK	22.97%	25.96%	23.72%	20.48%	25.88%	
POTTAWATTAMIE	4.02%	4.70%	5.09%	4.64%	4.30%	
POWESHIEK	0.59%	0.49%	0.49%	0.72%	0.85%	
RINGGOLD	0.13%	0.08%	0.07%	0.17%	0.18%	
SAC	0.19%	0.12%	0.12%	0.24%	0.28%	

Table C: Percent Distribution by County, 2009

2009 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2009 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	7.79%	7.62%	9.07%	8.29%	8.32%
SHELBY	0.19%	0.14%	0.15%	0.23%	0.13%
SIoux	0.45%	0.35%	0.36%	0.51%	0.23%
STORY	2.47%	2.23%	2.36%	2.33%	2.24%
TAMA	0.28%	0.28%	0.29%	0.30%	0.21%
TAYLOR	0.05%	0.03%	0.03%	0.07%	0.03%
UNION	0.20%	0.17%	0.19%	0.27%	0.16%
VAN BUREN	0.08%	0.07%	0.07%	0.12%	0.07%
WAPELLO	1.02%	0.83%	0.88%	1.13%	0.92%
WARREN	0.43%	0.26%	0.28%	0.49%	0.26%
WASHINGTON	0.21%	0.16%	0.18%	0.26%	0.12%
WAYNE	0.09%	0.07%	0.08%	0.14%	0.09%
WEBSTER	0.85%	0.88%	0.86%	0.93%	0.55%
WINNEBAGO	0.15%	0.09%	0.10%	0.19%	0.08%
WINNESHIEK	0.38%	0.41%	0.50%	0.47%	0.27%
WOODBURY	3.44%	3.84%	3.28%	2.81%	3.41%
WORTH	0.08%	0.04%	0.04%	0.09%	0.04%
WRIGHT	0.23%	0.16%	0.14%	0.27%	0.26%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2008

2009 Domestic Travel Impact on Iowa Table D: Percent Change over 2008					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	-8.61%	-6.35%	-5.59%	-0.25%	-1.46%
ADAMS	-4.75%	-2.40%	-1.60%	3.97%	2.70%
ALLAMAKEE	-7.08%	-4.78%	-4.00%	1.43%	0.19%
APPANOOSE	-7.97%	-5.69%	-4.92%	0.46%	-0.77%
AUDUBON	-9.77%	-7.54%	-6.78%	-1.51%	-2.71%
BENTON	-6.70%	-4.39%	-3.61%	1.84%	0.60%
BLACK HAWK	-3.90%	-1.53%	-0.72%	4.90%	3.62%
BOONE	-8.13%	-5.86%	-5.09%	0.28%	-0.95%
BREMER	-8.37%	-6.10%	-5.33%	0.02%	-1.20%
BUCHANAN	-9.93%	-7.70%	-6.95%	-1.69%	-2.88%
BUENA VISTA	-6.33%	-4.02%	-3.23%	2.24%	0.99%
BUTLER	-11.68%	-9.50%	-8.76%	-3.60%	-4.77%
CALHOUN	-8.76%	-6.51%	-5.74%	-0.41%	-1.63%
CARROLL	-3.34%	-0.95%	-0.13%	5.51%	4.23%
CASS	-4.04%	-1.67%	-0.87%	4.74%	3.46%
CEDAR	-8.24%	-5.97%	-5.20%	0.16%	-1.06%
CERRO GORDO	-3.31%	-0.92%	-0.11%	5.54%	4.25%
CHEROKEE	-4.19%	-1.82%	-1.01%	4.58%	3.31%
CHICKASAW	-2.33%	0.09%	0.91%	6.61%	5.32%
CLARKE	-5.24%	-2.90%	-2.10%	3.44%	2.18%
CLAY	-6.99%	-4.69%	-3.91%	1.53%	0.29%
CLAYTON	-12.70%	-10.54%	-9.81%	-4.70%	-5.87%
CLINTON	-1.98%	0.44%	1.27%	6.99%	5.69%
CRAWFORD	-5.94%	-3.62%	-2.82%	2.67%	1.42%
DALLAS	-1.27%	1.17%	2.00%	7.77%	6.46%
DAVIS	-6.81%	-4.51%	-3.73%	1.72%	0.48%
DECATUR	-8.01%	-5.73%	-4.96%	0.41%	-0.81%

Table D: Percent Change over 2008

2009 Domestic Travel Impact on Iowa Table D: Percent Change over 2008 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	-3.92%	-1.54%	-0.73%	4.88%	3.60%
DES MOINES	-6.01%	-3.68%	-2.89%	2.60%	1.35%
DICKINSON	-7.43%	-5.15%	-4.37%	1.04%	-0.19%
DUBUQUE	0.15%	2.62%	3.46%	9.31%	7.98%
EMMET	-8.71%	-6.45%	-5.69%	-0.35%	-1.57%
FAYETTE	-6.77%	-4.47%	-3.69%	1.76%	0.52%
FLOYD	-8.32%	-6.06%	-5.28%	0.07%	-1.15%
FRANKLIN	-3.03%	-0.64%	0.18%	5.84%	4.55%
FREMONT	-6.40%	-4.09%	-3.30%	2.17%	0.92%
GREENE	-10.65%	-8.44%	-7.69%	-2.47%	-3.66%
GRUNDY	-7.75%	-5.47%	-4.69%	0.70%	-0.53%
GUTHRIE	-6.47%	-4.16%	-3.37%	2.09%	0.85%
HAMILTON	-8.16%	-5.89%	-5.12%	0.25%	-0.97%
HANCOCK	-5.05%	-2.70%	-1.91%	3.64%	2.38%
HARDIN	-4.53%	-2.17%	-1.36%	4.21%	2.94%
HARRISON	-5.51%	-3.18%	-2.39%	3.13%	1.88%
HENRY	-9.80%	-7.57%	-6.81%	-1.54%	-2.74%
HOWARD	-4.40%	-2.03%	-1.23%	4.35%	3.08%
HUMBOLDT	-4.54%	-2.18%	-1.38%	4.19%	2.93%
IDA	-5.14%	-2.80%	-2.00%	3.54%	2.28%
IOWA	-9.88%	-7.66%	-6.90%	-1.63%	-2.83%
JACKSON	-10.83%	-8.63%	-7.88%	-2.67%	-3.85%
JASPER	-2.68%	-0.28%	0.54%	6.23%	4.93%
JEFFERSON	-6.79%	-4.49%	-3.71%	1.74%	0.50%
JOHNSON	-4.61%	-2.25%	-1.45%	4.12%	2.85%
JONES	-8.23%	-5.96%	-5.19%	0.17%	-1.05%
KEOKUK	-7.63%	-5.34%	-4.57%	0.83%	-0.40%

Table D: Percent Change over 2008

2009 Domestic Travel Impact on Iowa
Table D: Percent Change over 2008 (Continued)

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	-2.50%	-0.09%	0.73%	6.43%	5.13%
LEE	-5.39%	-3.05%	-2.26%	3.27%	2.01%
LINN	-4.71%	-2.35%	-1.55%	4.02%	2.75%
LOUISA	-9.00%	-6.76%	-5.99%	-0.68%	-1.89%
LUCAS	-3.49%	-1.10%	-0.29%	5.34%	4.06%
LYON	-5.77%	-3.44%	-2.65%	2.85%	1.60%
MADISON	-2.01%	0.41%	1.23%	6.96%	5.65%
MAHASKA	-3.45%	-1.06%	-0.25%	5.39%	4.10%
MARION	-7.19%	-4.90%	-4.12%	1.30%	0.07%
MARSHALL	-3.22%	-0.83%	-0.02%	5.64%	4.35%
MILLS	-8.75%	-6.50%	-5.73%	-0.40%	-1.61%
MITCHELL	-7.23%	-4.93%	-4.15%	1.27%	0.03%
MONONA	-4.02%	-1.65%	-0.84%	4.77%	3.49%
MONROE	-3.76%	-1.38%	-0.57%	5.05%	3.77%
MONTGOMERY	-5.06%	-2.71%	-1.91%	3.63%	2.37%
MUSCATINE	-9.65%	-7.41%	-6.66%	-1.38%	-2.58%
O'BRIEN	-4.31%	-1.95%	-1.14%	4.45%	3.18%
OSCEOLA	-6.54%	-4.23%	-3.44%	2.02%	0.77%
PAGE	-6.72%	-4.42%	-3.63%	1.82%	0.58%
PALO ALTO	-1.33%	1.11%	1.94%	7.70%	6.39%
PLYMOUTH	-8.13%	-5.86%	-5.09%	0.28%	-0.94%
POCAHONTAS	-8.58%	-6.32%	-5.56%	-0.21%	-1.43%
POLK	-6.02%	-3.69%	-2.90%	2.59%	1.34%
POTTAWATTAMIE	-8.19%	-5.92%	-5.15%	0.21%	-1.01%
POWESHIEK	-8.20%	-5.94%	-5.16%	0.20%	-1.02%
RINGGOLD	-0.94%	1.51%	2.34%	8.13%	6.81%
SAC	-7.84%	-5.57%	-4.79%	0.59%	-0.63%

Table D: Percent Change over 2008

2009 Domestic Travel Impact on Iowa Table D: Percent Change over 2008 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	-5.27%	-2.92%	-2.13%	3.41%	2.15%
SHELBY	-5.85%	-3.53%	-2.74%	2.77%	1.51%
SIOUX	-4.38%	-2.01%	-1.21%	4.38%	3.11%
STORY	-5.39%	-3.06%	-2.26%	3.27%	2.01%
TAMA	-10.51%	-8.30%	-7.55%	-2.32%	-3.51%
TAYLOR	-10.55%	-8.34%	-7.59%	-2.36%	-3.55%
UNION	-5.79%	-3.46%	-2.67%	2.83%	1.58%
VAN BUREN	-1.10%	1.34%	2.18%	7.95%	6.64%
WAPELLO	-4.15%	-1.79%	-0.98%	4.62%	3.35%
WARREN	-8.77%	-6.51%	-5.74%	-0.41%	-1.63%
WASHINGTON	-3.68%	-1.30%	-0.49%	5.14%	3.86%
WAYNE	-9.11%	-6.86%	-6.10%	-0.79%	-2.00%
WEBSTER	-10.67%	-8.46%	-7.71%	-2.49%	-3.68%
WINNEBAGO	-10.76%	-8.55%	-7.80%	-2.59%	-3.77%
WINNESHIEK	-3.17%	-0.78%	0.04%	5.70%	4.41%
WOODBURY	-5.88%	-3.55%	-2.76%	2.74%	1.49%
WORTH	-12.08%	-9.91%	-9.17%	-4.03%	-5.20%
WRIGHT	-7.18%	-4.88%	-4.10%	1.32%	0.09%
TOTAL	-5.48%	-3.14%	-2.31%	3.09%	1.85%

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Table E: Alphabetical by County, 2008

2009 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2008					
<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	\$13.53	\$1.41	0.10	\$0.55	\$0.09
ADAMS	2.32	0.30	0.02	0.14	0.03
ALLAMAKEE	32.27	3.60	0.20	1.66	0.80
APPANOOSE	14.75	2.01	0.12	0.83	0.20
AUDUBON	4.36	0.50	0.02	0.30	0.05
BENTON	15.55	1.67	0.10	1.05	0.11
BLACK HAWK	275.44	49.87	2.75	11.86	3.70
BOONE	21.26	2.78	0.16	1.27	0.18
BREMER	46.16	6.61	0.48	2.33	0.34
BUCHANAN	23.36	2.76	0.15	1.38	0.27
BUENA VISTA	25.24	3.54	0.21	1.27	0.23
BUTLER	7.72	0.70	0.03	0.51	0.05
CALHOUN	9.12	1.20	0.06	0.59	0.24
CARROLL	46.42	6.83	0.46	2.44	0.36
CASS	21.62	2.64	0.16	1.21	0.15
CEDAR	18.84	2.48	0.14	1.24	0.25
CERRO GORDO	157.23	24.75	1.51	7.41	2.57
CHEROKEE	12.78	2.10	0.13	0.89	0.11
CHICKASAW	8.38	1.43	0.10	0.55	0.10
CLARKE	19.02	2.56	0.18	1.03	0.16
CLAY	81.59	19.85	0.72	1.97	1.04
CLAYTON	28.83	4.65	0.28	1.55	0.58
CLINTON	93.63	15.45	0.96	4.68	1.19
CRAWFORD	17.32	2.97	0.18	1.07	0.16
DALLAS	130.54	21.15	1.42	6.16	1.08
DAVIS	5.58	0.65	0.04	0.31	0.07
DECATUR	11.26	1.15	0.07	0.53	0.10

Table E: Alphabetical by County, 2008

2009 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2008 (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	6.81	0.78	0.04	0.39	0.08
DES MOINES	99.60	19.34	0.95	4.08	1.38
DICKINSON	212.69	29.39	1.88	11.57	3.75
DUBUQUE	253.66	44.22	2.67	11.61	3.35
EMMET	9.73	1.47	0.08	0.59	0.12
FAYETTE	14.10	1.67	0.09	0.78	0.12
FLOYD	15.98	2.77	0.13	0.82	0.15
FRANKLIN	9.88	1.17	0.07	0.60	0.06
FREMONT	12.40	1.88	0.12	0.68	0.11
GREENE	5.46	0.70	0.04	0.33	0.07
GRUNDY	4.40	0.68	0.04	0.32	0.04
GUTHRIE	10.76	1.75	0.09	0.90	0.28
HAMILTON	20.94	3.02	0.20	1.14	0.17
HANCOCK	5.32	0.89	0.04	0.32	0.08
HARDIN	17.08	1.86	0.10	0.78	0.12
HARRISON	23.87	3.26	0.23	1.27	0.17
HENRY	18.89	3.01	0.18	0.94	0.26
HOWARD	3.81	0.50	0.03	0.22	0.04
HUMBOLDT	9.62	1.67	0.07	0.35	0.11
IDA	5.32	0.75	0.05	0.36	0.06
IOWA	41.63	7.52	0.52	2.38	0.64
JACKSON	25.06	3.70	0.22	1.48	0.54
JASPER	60.94	8.53	0.54	2.84	0.77
JEFFERSON	34.34	5.55	0.38	1.59	0.28
JOHNSON	306.43	50.79	3.45	13.74	4.66
JONES	17.62	1.97	0.11	1.09	0.13
KEOKUK	4.21	0.44	0.02	0.24	0.05

Table E: Alphabetical by County, 2008

2009 Domestic Travel Impact on Iowa						
Table E: Alphabetical by County, 2008 (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	12.82	1.58	0.10	0.73	0.09	
LEE	54.82	9.08	0.56	2.84	0.74	
LINN	590.39	112.65	5.88	24.81	9.05	
LOUISA	12.17	1.80	0.11	0.89	0.31	
LUCAS	6.32	0.82	0.05	0.34	0.07	
LYON	5.66	0.64	0.04	0.35	0.05	
MADISON	10.46	1.06	0.06	0.63	0.10	
MAHASKA	15.43	3.19	0.19	1.18	0.24	
MARION	38.78	5.46	0.34	1.98	0.32	
MARSHALL	67.68	11.17	0.66	3.34	0.86	
MILLS	6.61	0.88	0.06	0.51	0.06	
MITCHELL	8.47	0.95	0.06	0.44	0.08	
MONONA	18.09	3.65	0.21	0.90	0.22	
MONROE	7.13	1.38	0.09	0.51	0.09	
MONTGOMERY	17.19	3.31	0.22	1.24	0.19	
MUSCATINE	66.56	11.15	0.71	3.52	0.74	
O'BRIEN	17.55	2.35	0.15	0.98	0.13	
OSCEOLA	3.13	0.45	0.03	0.18	0.03	
PAGE	15.09	1.69	0.10	0.84	0.13	
PALO ALTO	28.29	4.32	0.24	1.63	0.54	
PLYMOUTH	19.35	2.51	0.15	1.15	0.15	
POCAHONTAS	3.92	0.49	0.03	0.23	0.04	
POLK	1,479.82	291.36	15.41	62.39	23.56	
POTTAWATTAMIE	264.98	54.04	3.39	14.47	4.00	
POWESHIEK	39.19	5.58	0.32	2.25	0.79	
RINGGOLD	7.83	0.85	0.04	0.50	0.16	
SAC	12.79	1.39	0.08	0.74	0.26	

Table E: Alphabetical by County, 2008

2009 Domestic Travel Impact on Iowa Table E: Alphabetical by County, 2008 (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	497.77	84.80	5.85	25.07	7.51
SHELBY	12.39	1.53	0.09	0.69	0.12
SIOUX	28.24	3.86	0.23	1.53	0.20
STORY	157.79	24.89	1.52	7.07	2.03
TAMA	18.66	3.29	0.20	0.97	0.20
TAYLOR	3.06	0.33	0.02	0.23	0.03
UNION	12.99	1.90	0.12	0.83	0.14
VAN BUREN	5.02	0.74	0.05	0.33	0.06
WAPELLO	64.29	9.17	0.56	3.38	0.82
WARREN	28.81	2.97	0.19	1.53	0.24
WASHINGTON	13.51	1.73	0.11	0.76	0.10
WAYNE	5.79	0.80	0.05	0.44	0.09
WEBSTER	57.56	10.37	0.59	2.97	0.53
WINNEBAGO	10.16	1.08	0.07	0.61	0.08
WINNESHIEK	23.97	4.42	0.31	1.39	0.24
WOODBURY	221.18	43.06	2.13	8.56	3.10
WORTH	5.45	0.44	0.03	0.30	0.04
WRIGHT	14.89	1.86	0.09	0.82	0.24
TOTAL	\$6,406.73	\$1,115.94	64.60	\$303.22	\$90.55

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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 TIA (formerly known as the U.S. Travel Data Center) to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of 16 travel categories. 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 trips away from home in paid accommodations and day trips or overnight trips to places 50 miles or more, one way, from the traveler's origin.

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 16 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.

A *travel expenditure* is assumed to take place whenever a traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into 16 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. Sixteen (16) 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 16 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in hotels in Vermont 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 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 TIA, 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) In-Flight Survey 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 16 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 Massachusetts 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 Massachusetts.

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.

Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and ES-202, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, TIA's travel surveys and other sources are used in building and updating the model. These data indicate the change in travel spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

Limitations of the Study

This study is designed to indicate the impact of U.S. traveler expenditures on employment, payroll, business receipts and tax revenue in each of the states. These impact estimates reflect the limitations

inherent in the definition of travel expenditures. Two important classes of travel-related expenses have not been estimated due to 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

Glossary of Terms

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."

Travel-generated Tax Receipts. 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, 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 Measurement

SIC-NAICS Transition

As described in Appendix A, the 16 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, TIA selected these business types using 1987 U.S. Standard Industrial Classification (SIC) system codes.

The SIC system has been used for decades with tremendous success to classify all businesses in the U.S. by the types of products or services they make available. To its credit, the SIC system has facilitated the collection, tabulation and analysis of data. It has also promoted “apples-to-apples” comparability in statistical analyses. At the industry group level, SIC Codes report industry groups as 2 or 3 digit categories to 4 digits at their most specific.

However, as a direct consequence of rapid and widespread structural changes throughout the American economy in recent years, the SIC system has become largely outdated. Therefore, its business classification capabilities have become increasingly less than optimal.

In 1998, the United States Office of Management and Budget published a new industry classification system – the 1997 North American Industry Classification System (NAICS) to replace the SIC system. In contrast, the 2- to 6-digit NAICS industry classification system includes more useful and detailed economic data and provides a more comprehensive statistical representation of our industry. NAICS offers four major advantages over the SIC system:

Relevance: NAICS identifies hundreds of new, emerging, and advanced technology industries. Perhaps most important in terms of quantification of travel-related activity, NAICS reorganizes industries into more meaningful sectors, especially in the service-producing segments of the economy. A few examples of travel-related industries that are separately recognized for the first time:

- Convenience stores
- Gas stations with convenience stores
- Casino hotels
- Casinos
- Other gambling industries
- Bed and breakfast inns
- Limited service restaurants

International Comparability: NAICS was developed by the U.S. Office of Management and Budget (OMB) in cooperation with Statistics Canada and Mexico’s Instituto Nacional de Estadística, Geografía e Informática (INEGI). NAICS provides for comparable statistics among the three NAFTA trading partners.

Consistency: NAICS defines industries according to a consistent principle -- businesses that use similar processes are grouped together.

Adaptability: NAICS will be reviewed every five years, so classifications and information keep up with our changing economy.

TEIM: SIC/NAICS Industry Categories

With the transition to NAICS, TIA has adjusted its selections of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, TIA's Travel Economic Impact Model, tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of sixteen (16) business subcategories.

The industry groups and subcategories used in the model are outlined below, followed by a detailed table of SIC and NAICS Codes.

1. Automobile Transportation Industry: Gasoline service stations, motor vehicle/parts dealers and passenger car rental.
2. Entertainment/Recreation Industry: Entertainment, art and recreation industry.
3. Foodservice Industry: Eating & drinking places, and grocery stores.
4. General Retail Trade Industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops.

Incidental Purchases Industry: See above, General Retail Trade Industry.

5. Lodging Industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.
6. 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."
7. Travel Arrangement Industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

**1987 SIC – 1997 NAICS:
Selected Travel-Related Categories**

SIC DESCRIPTION(S)	SIC CODE(S)	NAICS DESCRIPTION(S)	NAICS CODE(S)
Accommodations			
<i>Hotels and Motels</i>	701	<i>Traveler Accommodation</i>	7211
<i>Recreational Vehicle Parks & Campsites</i>	703	<i>Recreational Vehicle Parks & Campgrounds</i>	7212
Auto Transportation			
<i>Passenger Car Rental</i>	7514	<i>Passenger Car Rental</i>	532111
<i>Gasoline Service Stations</i>	554	<i>Gasoline Stations with Convenience Stores; Other Gasoline Stations</i>	447110; 447190
<i>Automotive Dealers</i>	55 (excl. 554)	<i>Motor Vehicle & Parts Dealers</i>	4411; 4412; 4413
Entertainment and Recreation			
<i>Amusement and Recreational Services</i>	79	<i>Amusement, Gambling & Recreation Industries</i>	713
		<i>Performing Arts, Spectator Sports & Related Industries</i>	711
<i>Museums, Art Galleries, Botanical and Zoological Gardens</i>	84	<i>Museums, Historical Sites & Similar Institutions</i>	712
Food			
<i>Eating & Drinking Places (Alcoholic Beverages)</i>	581	<i>Foodservices & Drinking Places</i>	7221; 7222; 7224
<i>Grocery Stores</i>	541	<i>Food and Beverage stores</i>	4451; 4452; 4453
Public Transportation			
<i>Air Transportation</i>	45	<i>Passenger Air Transportation; Airport Support Activities</i>	481; 4881
<i>Rail - Local & Suburban Transit</i>	4111	<i>Rail Transportation</i>	485112
<i>Interurban & Rural Bus Carriers</i>	413	<i>Interurban & Rural Bus Transportation</i>	4852
<i>Charter Bus/Interstate</i>	4142	<i>Charter Bus (interstate/interurban)</i>	4855102
<i>Taxi & Limousine Services</i>	412	<i>Taxi & Limousine Services</i>	4853
<i>Water Transportation of Passengers</i>	448	<i>Water Passenger Transportation</i>	483112; 483114; 483212
--	--	<i>Scenic & Sightseeing Transportation</i>	487
		<i>(New industry-includes parts of SICs 4119,4489,4522,4789,7999)</i>	
Retail			
<i>General Merchandise Stores</i>	53	<i>General Merchandise Stores</i>	452
<i>Miscellaneous Retail Stores</i>	59	<i>Other Retail Stores</i>	453; 44611; 4483; 45111; 45112; 45121
Travel Arrangement			
<i>Travel Arrangement</i>	472	<i>Travel Arrangement & Reservation Services</i> <i>(includes travel agencies and tour operators)</i>	5615

Appendix D: Sources of Data

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

Organizations

Air Transport Association
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 Department of Economic Development, 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