

The Economic Impact of Travel on Iowa Counties 2011

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 2012

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 2011 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 2011 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, 2010 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 2011 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 \$7.2 billion (in current dollars) in 2011, representing an increase of 10.3 percent from 2010.
- Partially reflecting the soaring motor fuel prices in 2011, the nominal domestic traveler spending (not adjusted by inflation) on auto transportation in Iowa was up 20.0 percent.
- Total payroll income received by domestic travel-generated employees and workers in Iowa, increased 3.7 percent from 2010 to \$1.1 billion.
- Domestic traveler expenditures directly generated 63,400 jobs in Iowa during 2011, a 2.2 percent increase from 2010. Domestic travel-generated jobs in Iowa comprised 4.3 percent of total state non-farm employment in 2011.
- On average, every \$114,366 spent by domestic travelers in Iowa during 2011 generated one job.
- Domestic traveler spending in Iowa directly generated \$802.8 million in federal, state and local tax revenue in 2011, up 2.7 percent from 2010.
- Polk County, which includes the city of Des Moines, generated over \$1.6 billion in domestic traveler expenditures to lead all Iowa counties in 2011.
- Fourteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2011. Thirteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

TRAVEL IMPACT ON THE U.S. ECONOMY IN 2011

Following the longest and deepest downturn since the Great Depression, 2011 was a year of recovery for the U.S. economy. There were fluctuations in major economic indicators, but by and large, the economy showed signs of improvement. Real GDP in chained 2006 dollars grew 3.0 percent from 2010, the strongest annual rate of GDP growth since 2006. Yet, the U.S. economy showed signs of slowing down in the second half of 2011. After growing at an annual rate of 3.9 percent during the first half of the year, real GDP advanced at a slower 2.4 percent pace during the second half of 2011. Much of this slowdown was due to declines in residential investment and business inventories as well as a slowdown in business investment, which together more than offset improvements in consumer spending and exports.

In terms of employment, the economic recovery remained soft in 2011. A total of 940,000 non-farm jobs were added during the 12 months of 2011. Still, by the end of the year, total U.S. non-farm employment remained 7.7 million, or 5.6%, below the peak achieved in January of 2009. The national unemployment rate continued to climb in 2011, rising from 9.3 percent in 2010 to 9.6 percent, the highest level since 1983.

The Consumer Price Index (CPI), an indicator of the level of price inflation, rose 1.6 percent in 2011, while the U.S. Travel Association's Travel Price Index (TPI) increased at a faster rate of 3.8 percent during the same period. The rising prices on motor fuel and airline fares were the major factors that resulted in the much faster increase in the Travel Price Index.

Performance of the U.S. economy in the first half of the year 2012 was disappointing. The annual growth rate of Real GDP increased just 0.4 percent in the first quarter and 1.3 percent in the second quarter. The subdued performance of the U.S. economy during the first half of the year was due to slowdowns in consumer spending, business investment and exports as well as a decline in government consumption expenditures, while residential investment remained stagnant. Since growth in Real GDP has been slower than anticipated so far in 2012, many forecasts for the full-year have been downgraded to a growth rate of 2.0 percent or slightly less. Many research organizations believe that the unemployment rate will remain above 9 percent for 2012. According to the U.S. Travel Association's forecast, the Consumer Price Index and Travel Price Index are projected to increase 2.9 percent and 6.0 percent, respectively, in 2012. Combined with the anticipated modest growth of travel demand and higher cost of travel, total traveler spending is expected to increase 7.7 percent in 2012.

U.S. Travel Volume in 2011

U.S. domestic travel, including leisure and business travel, increased 3.5 percent to a total of 1.96 billion person-trips in 2011. 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. Total domestic person-trips are expected to increase 2.1 percent in 2012.

Domestic leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, increased 3.5 percent in 2011 as compared to 2010, totaling 1.52 billion person-trips and is expected to increase 2.4 percent in 2012. Leisure travel accounted for 77.2 percent of all U.S. domestic travel in 2011. After five consecutive years of decline, domestic business travel grew 3.7 percent in 2011 to 447.8 million person trips. Domestic business travel is forecasted to increase 1.2 percent in 2012.

International inbound travelers, including visitors from overseas, Canada and Mexico, made 59.8 million visits to the United States in 2011, up 8.8 percent from 2010. These international travelers spent \$103.5 billion (excluding passenger air fares paid to U.S. airlines) in the U.S. during 2011, up 9.9 percent from 2010. Total international arrivals to the U.S. are expected to increase 3.5 percent to 61.9 million in 2012 and total expenditures in the U.S. (excluding international passenger fares paid to U.S. airlines) are expected to reach \$113.9 billion, up 10.0 percent from 2011.

Travel Expenditures in 2011

After a substantial decline in 2010, domestic and international travel spending in the U.S. increased 7.7 percent over 2010 to \$758.7 billion in 2011. Leisure travelers' spending increased 7.4 percent while business travel spending was up 8.4 percent in the year. However, travel spending in 2011 was still lower than in 2009.

Domestic travelers directly spent \$655.2 billion in 2011, a 7.4 percent increase from 2010. This increase reflected a higher travel volume, as well as a rise in travel costs largely driven by high and rising motor fuel prices and airline fares. Domestic travel expenditures are forecasted to grow 7.3 percent in 2012.

International travelers spent \$103.5 billion in the U.S. during 2011, up 9.9 percent from 2010. In addition, international travelers paid a total of \$30.9 billion to U.S. air carriers on international passenger fares in 2011, an increase of 18.5 percent from 2010. As a result, \$31.6 billion was generated as a U.S. travel trade surplus in 2011, the largest surplus in the past 50 years and \$10.6 billion more than 2010. International travelers' spending in the U.S. is expected to increase 10.0 percent in 2012.

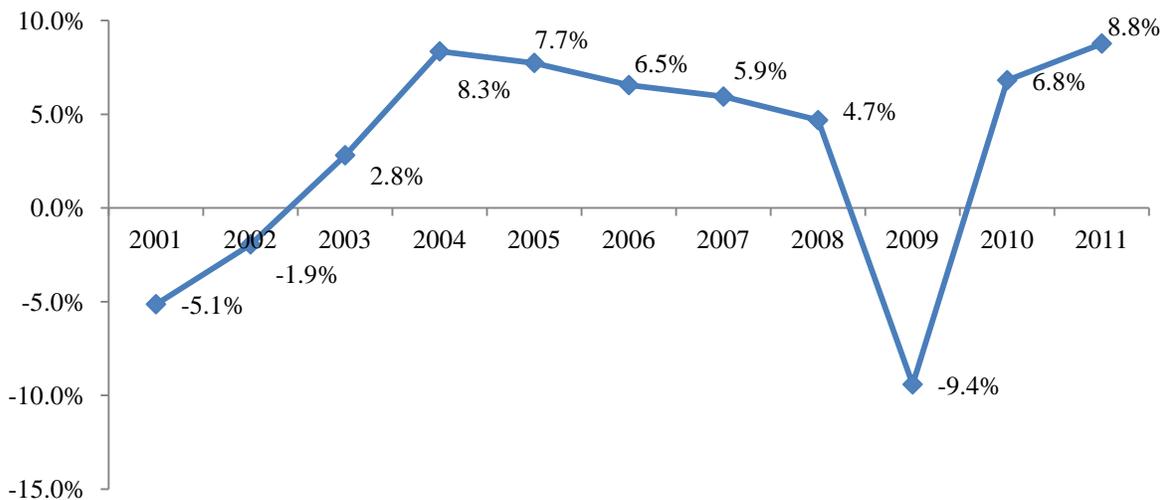
Real travel and tourism spending in chained 2006 dollars increased 3.7 percent in 2011, after two consecutive years of decline. Price for travel goods and services increased 3.9 percent in 2011 after a decrease of 6.3 percent in 2010, according to the U.S. Travel Association's Travel Price Index (TPI).

Table 1: Travel Expenditures in the U.S., 2010 and 2011

<u>Industry Sector</u>	2010 Travel Spending in The U.S. (\$ Billions)	2011p Travel Spending in The U.S. (\$ Billions)	% 2011p/2010 Travel Spending in The U.S. (Percent Change)
<u>Domestic Travel</u>			
Public Transportation	\$130.4	\$142.7	9.4%
Auto Transportation	123.7	145.8	17.9%
Lodging	108.2	116.1	7.3%
Foodservice	159.0	167.5	5.4%
Entertainment/Recreation	74.0	75.6	2.2%
General Retail	48.7	49.1	0.7%
<u>Domestic Total</u>	\$643.9	\$696.7	8.2%
International Total*	\$103.5	\$116.3	12.3%
Grand Total	\$747.4	\$812.9	8.8%

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

**Changes of Direct Travel Expenditures*
in the U.S., 2001-2011p**



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

Travel Employment in 2011

The job market in the U.S. has been struggling since the recession ended in the middle of 2010. The nation's unemployment rate hit 9.6 percent in 2011, the highest since 1983 and it is likely to remain above 9.0 percent in the remainder of 2012. Total non-farm employment in the U.S. decreased 0.8 percent in the year. In 2011, travel directly generated nearly 7.4 million U.S. jobs, a slight decline of 0.2% from 2010, after a decrease of 4.2 percent in 2010. Travel generated jobs accounted for 5.7 percent of total non-farm employment in the U.S. in 2011.

In current sluggish economy, with stubbornly high unemployment and weak job growth, travel and tourism has proven itself to be one of the most efficient job creating industries. From December 2010, almost 77,000 jobs were added to travel and tourism industry, accounting for 8.2 percent of all jobs added to non-farm private industries. Between March 2011 and July 2012, job growth in the travel industry was 84 percent faster than the rest of the economy. So far in 2012, the travel industry is responsible for 1 out of every 9 new jobs that have been created in the United States.

Table 2: Travel-Generated Employment in the U.S., 2010 and 2011

<u>Industry Sector</u>	2010 Travel- Generated Employment (Thousands)	2011p Travel-Generated Employment (Thousands)	2011p Percent Change Over 2010 (%)
<i><u>Domestic Travel</u></i>			
Public Transportation	881.9	884.2	0.3%
Auto Transportation	247.2	249.0	0.7%
Lodging	1,164.6	1,188.4	2.0%
Foodservice	2,534.1	2,579.6	1.8%
Entertainment/Recreation	1,048.8	1,060.6	1.1%
General Retail	316.7	315.3	-0.4%
Travel Planning	156.9	160.7	2.5%
<u>Domestic Total</u>	6,350.2	6,437.9	1.4%
<u>International Total</u>	1,020.7	1,074.5	5.3%
Grand Total	7,370.9	7,512.4	1.9%

Sources: U.S. Travel Association, BLS

* Excludes jobs generated by international passenger fare payments.

Table 3: Overall U.S. Economic Developments, 2009-2011

<u>Sector</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Nominal gross domestic product (\$ Billions)	\$13,973.7	\$14,498.9	\$15,075.7
Real gross domestic product (\$ Billions)*	\$12,757.9	\$13,063.0	\$13,299.1
Real disposable personal income (\$Billions)*	\$9,836.7	\$10,016.5	\$10,149.7
Real personal consumption expenditures (\$ Billions)*	\$9,032.6	\$9,196.2	\$9,428.8
Consumer price index**	214.5	218.1	224.9
Travel Price Index**	241.5	250.7	266.9
Non-farm payroll employment (Millions)	130.8	129.9	131.4
Unemployment rate (%)	9.3	9.6	8.9

Percentage change from previous year

Nominal gross domestic product	-2.2%	3.8%	4.0%
Real gross domestic product	-3.1%	2.4%	1.8%
Real disposable personal income	-2.8%	1.8%	1.3%
Real personal consumption expenditures	-1.9%	1.8%	2.5%
Consumer price index	-0.4%	1.6%	3.2%
Travel Price Index	-6.3%	3.8%	6.5%
Non-farm payroll employment	-4.4%	-0.7%	1.1%

Sources: U.S. Dept. of Commerce, U.S. Dept. of Labor, U.S. Census Bureau, U.S. Travel Association

* Chained 2006 dollars

** 1982-84=100

Table 4: U.S. Travel Trends, 2007-2011

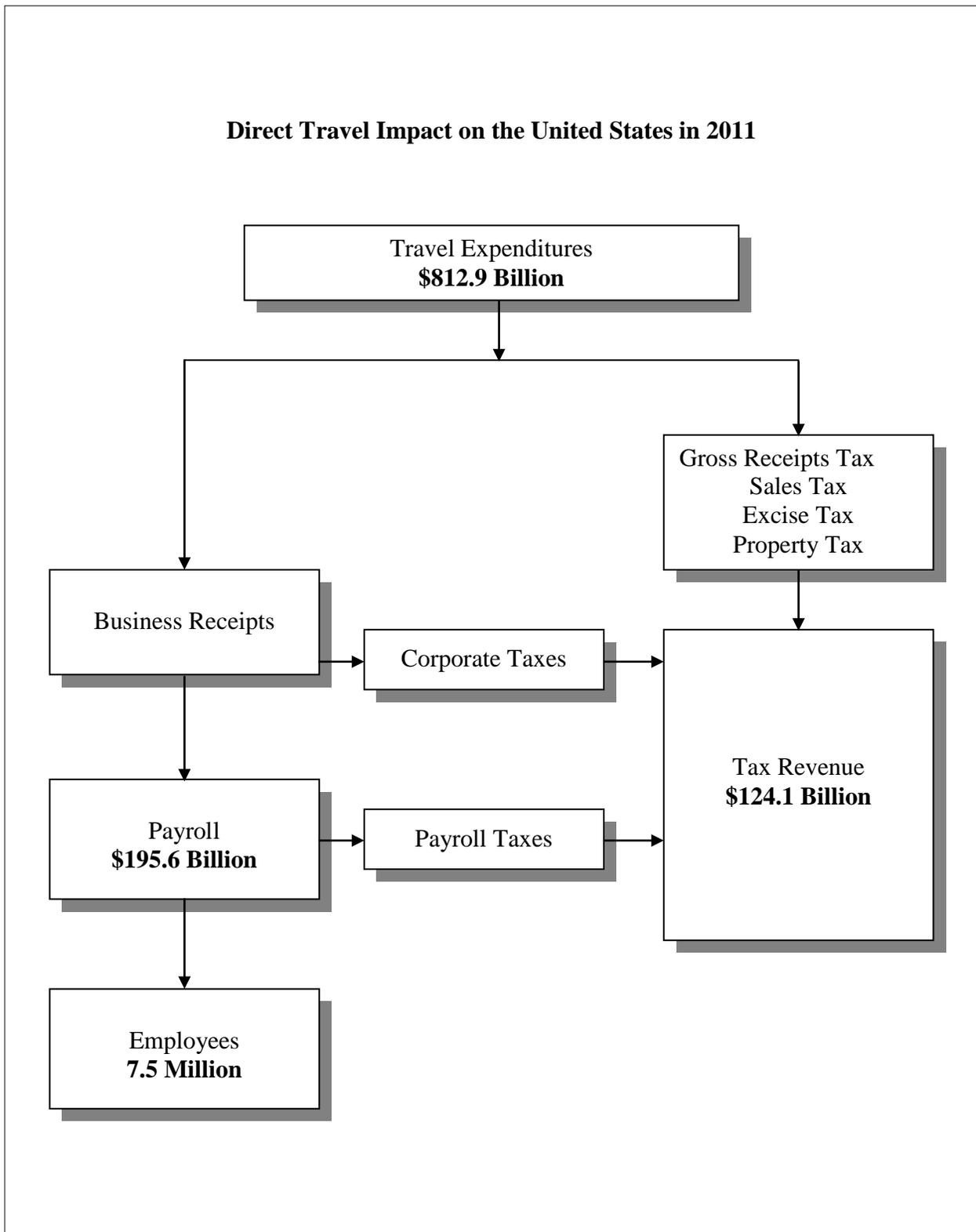
<u>Category</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Total travel expenditures (\$ billions)	\$738.0	\$772.5	\$699.8	\$747.4	\$812.9
<i>U.S. travelers' expenditures (\$ billions)</i>	\$640.6	\$662.1	\$605.6	\$643.9	\$696.7
<i>International travelers' expenditures In the U.S.* (\$ billions)</i>	\$97.4	\$110.4	\$94.2	\$103.5	\$116.3
Travel price index**	244.0	257.7	241.5	250.7	266.9
Travel-generated employment*** (thousands)	7,699.9	7,723.1	7,397.2	7,370.9	7,512.4
Percentage change from previous year					
Total travel expenditures	5.9%	4.7%	-9.4%	6.8%	8.8%
<i>U.S. travelers' expenditures</i>	4.9%	3.4%	-8.5%	6.3%	8.2%
<i>International travelers' expenditures in the U.S.</i>	13.0%	13.4%	-14.7%	9.9%	12.3%
Travel price index	4.5%	5.6%	-6.3%	3.8%	6.5%
Travel-generated employment	2.1%	0.3%	-4.2%	-0.4%	1.9%

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

* International traveler spending does not include international passenger fares.

** 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.

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DOMESTIC TRAVEL IMPACT ON IOWA

TRAVEL EXPENDITURES

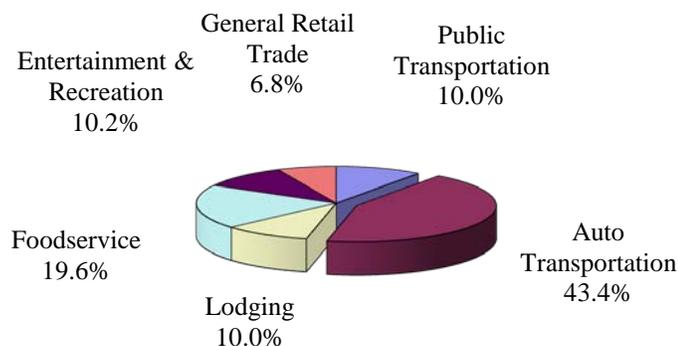
Domestic traveler spending in Iowa totaled \$7.2 billion (in current dollars) during 2011, representing an increase of 10.3 percent from 2010.

Partially reflecting the soaring motor fuel prices in 2011, the nominal traveler spending (not adjusted by inflation) on auto transportation in Iowa was up 20.0 percent to \$3.1 billion. Domestic travelers directly spent \$725.1 million on public transportation in 2011, up 6.3 percent from 2010.

Domestic traveler spending on lodging was up 5.3 percent to \$726.7 million in 2011. According to Smith Travel Research, both demand for Iowa hotel rooms (room nights sold) and average daily room rate in 2011 increased 2.8 percent from 2010.

Accounting for 19.6 percent of the state total domestic traveler expenditures, spending on foodservice rose 4.0 percent to \$1.4 billion in 2011. Domestic travelers spent \$738.1 million on entertainment and recreation services in 2011, up 0.7 percent from 2010. Domestic traveler spending on general retail increased 2.8 percent to \$493.2 million in 2011.

Domestic Travel Spending in Iowa in 2011 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, 2010-2011

<i>2011 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
Public Transportation	\$725.1	10.0%
Auto Transportation	3,145.0	43.4%
Lodging	726.7	10.0%
Foodservice	1,418.4	19.6%
Entertainment & Recreation	738.1	10.2%
General Retail Trade	493.2	6.8%
<hr/>		
Total*	\$7,246.5	100.0%
 <i>2010 Travel Expenditures</i>		
Public Transportation	\$681.9	10.4%
Auto Transportation	2,619.9	39.9%
Lodging	690.1	10.5%
Foodservice	1,363.5	20.8%
Entertainment & Recreation	732.9	11.2%
General Retail Trade	480.0	7.3%
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Total	\$6,568.3	100.0%
<hr/>		
<i>Percent Change</i>		
<i>2011 over 2010</i>		
Public Transportation	6.3%	
Auto Transportation	20.0%	
Lodging	5.3%	
Foodservice	4.0%	
Entertainment & Recreation	0.7%	
General Retail Trade	2.8%	
<hr/>		
Total	10.3%	

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

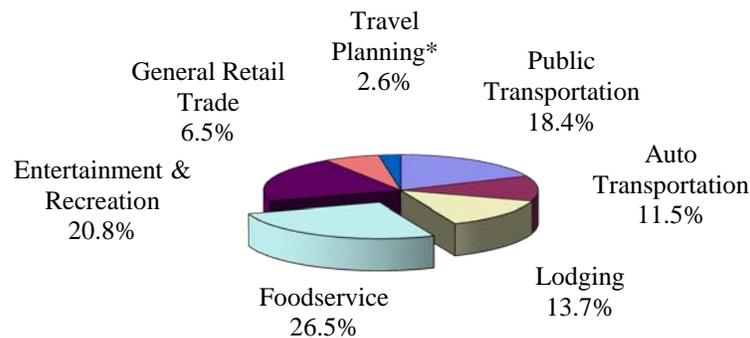
Travel-generated payroll is defined as the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry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

Total payroll income received by domestic travel-generated employees and workers in Iowa, increased 3.7 percent to just over \$1.1 billion. On the average, every dollar spent by domestic travelers produced 15.5 cents in payroll income in Iowa during 2011.

The foodservice sector, which posted the highest share of payroll (26.5%) among the seven industry sectors investigated in this report, was up by 3.5 percent from 2010 to \$297.0 million.

Entertainment and recreation, the second largest sector (20.8%) in Iowa tourism industry by domestic travel generated payroll, increased 2.9 percent from 2010 to \$233.3 million.

**Domestic Travel-Generated Payroll in Iowa in 2011
by Industry Sector**



Domestic Travel-Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2010-2011

<i>2011 Payroll</i>	<u>Total</u> <u>(\$ Millions)</u>	<u>% of Total</u> <u>(Percent)</u>
Public Transportation	\$206.2	18.4%
Auto Transportation	128.8	11.5%
Lodging	153.1	13.7%
Foodservice	297.0	26.5%
Entertainment & Recreation	233.3	20.8%
General Retail Trade	73.0	6.5%
Travel Planning*	29.0	2.6%
Total**	\$1,120.5	100.0%
 <i>2010 Payroll</i>		
Public Transportation	\$205.0	19.0%
Auto Transportation	125.1	11.6%
Lodging	143.5	13.3%
Foodservice	286.9	26.5%
Entertainment & Recreation	226.8	21.0%
General Retail Trade	68.9	6.4%
Travel Planning*	24.8	2.3%
Total**	\$1,080.9	100.0%
 <i>Percent Change</i> <i>2011 over 2010</i>		
Public Transportation	0.6%	
Auto Transportation	3.0%	
Lodging	6.7%	
Foodservice	3.5%	
Entertainment & Recreation	2.9%	
General Retail Trade	6.1%	
Travel Planning*	17.0%	
Total**	3.7%	

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. Despite some signs of economic recovery, the job market in Iowa remained soft in 2011. Including full-time and seasonal/part-time positions, the state's domestic travel-generated jobs increased 2.2 percent from 2010 to 63,400.

On the average, every \$114,366 spent by domestic travelers in Iowa directly supported one job in 2011.

The 63,400 jobs supported by domestic travel in Iowa comprised 4.3 percent of state's total non-agricultural employment during 2011. Without these jobs generated by domestic travel, Iowa's 2011 unemployment rate of 5.9 percent would have been 3.8 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 sectors investigated in this report. During 2011, 23,800 jobs in this sector were supported directly by domestic travel in Iowa, accounted for 37.6 percent of total domestic travel-generated jobs in the state. Employment in this industry increased 0.9 percent from 2010.

Domestic travel directly supported 13,000 jobs in entertainment and recreation sector in 2011, the second largest component of the state total. Travel supported employment in this sector increased 2.9 percent from 2010.

Domestic Travel-Generated Employment in Iowa in 2011 by Industry Sector

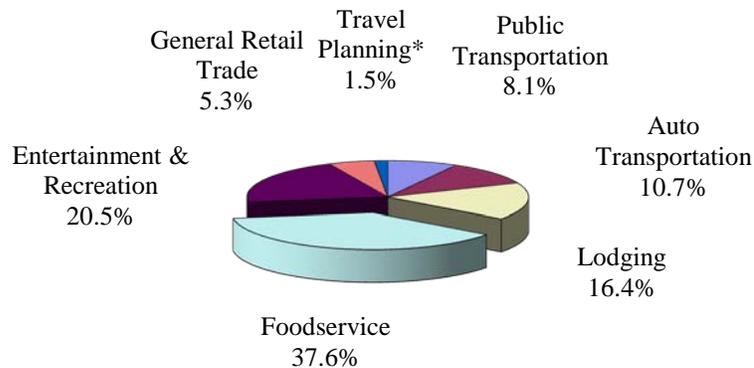


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2010-2011

<i>2011 Employment</i>	Total (Thousand)	% of Total (Percent)
Public Transportation	5.1	8.1%
Auto Transportation	6.8	10.7%
Lodging	10.4	16.4%
Foodservice	23.8	37.6%
Entertainment & Recreation	13.0	20.5%
General Retail Trade	3.4	5.3%
Travel Planning*	1.0	1.5%
Total**	63.4	100.0%
<i>2010 Employment</i>		
Public Transportation	5.1	8.1%
Auto Transportation	6.6	10.6%
Lodging	10.2	16.4%
Foodservice	23.6	38.1%
Entertainment & Recreation	12.6	20.3%
General Retail Trade	3.3	5.3%
Travel Planning*	0.8	1.2%
Total**	62.0	100.0%
<i>Percent Change 2011 over 2010</i>		
Public Transportation	1.0%	
Auto Transportation	2.9%	
Lodging	2.3%	
Foodservice	0.9%	
Entertainment & Recreation	2.9%	
General Retail Trade	2.5%	
Travel Planning*	27.7%	
Total**	2.2%	

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.

Total tax revenues directly generated by domestic traveler spending in Iowa grew 2.7 percent from 2010 to a total of \$802.8 million. The federal government collected a total of \$372.6 million from domestic traveler spending, an increase of 2.4 percent. Tax collections by the federal government accounted for 46.4 percent of all travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.1 cents for federal tax coffers.

Tax revenue generated by domestic traveler spending for Iowa's state treasury rose 2.3 percent to a total of \$328.8 million. State government comprised 41.0 percent of all domestic travel-generated tax revenue for 2011 collected in the state. On average, each travel dollar produced 4.5 cents in state tax receipts. Tax revenues collected by the local governments (counties and cities) were 5.2 percent higher than in 2010 to a total of \$101.4 million. Each travel dollar produced 1.4 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in Iowa in 2011
by Level of Government**

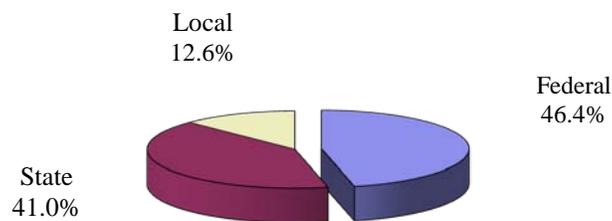


Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2010-2011

<i>2011 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$372.6	46.4%
State	328.8	41.0%
Local	101.4	12.6%
Total	\$802.8	100.0%
<i>2010 Tax Revenue</i>		
Federal	\$363.8	46.5%
State	321.4	41.1%
Local	96.4	12.3%
Total	\$781.6	100.0%
<i>Percent Change 2011 over 2010</i>		
Federal	2.4%	
State	2.3%	
Local	5.2%	
Total	2.7%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2011, domestic travel expenditures in Iowa totaled \$7.2 billion (in current dollars), representing an increase of 10.3 percent from 2010. This spending directly generated 63,400 jobs and \$1.1 billion in payroll income. Additionally, a total of \$430.2 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 over \$3.5 billion in direct domestic travel expenditures, accounting for nearly half of the state total (48.8 percent). Domestic travel spending in the top five counties generated \$591.8 million in payroll (52.8 percent of the state total) and 32,700 jobs (51.6 percent of the state total) in 2011.

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 2011. Domestic traveler expenditures in Polk County reached \$1.6 billion, accounting for 22.5 percent of the state total. These expenditures generated \$287.2 million in payroll income and 14,900 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$683.8 million in domestic travel spending in 2011, representing 9.4 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$116.0 million and 5,900 jobs.

Scott County posted \$566.6 million in domestic expenditures to rank third. These expenditures generated \$86.7 million in payroll as well as 5,800 jobs within the county.

Johnson County ranked fourth with \$341.7 million in domestic travel expenditures. These travel expenditures benefited county residents with \$51.3 million in payroll income and 3,400 jobs.

Black Hawk County ranked fifth by travel spending in 2011. Domestic travelers spent \$311.3 million in the county, generating \$50.5 million in payroll income and 2,700 jobs.

Domestic Travel Impact on Iowa - Top 5 Counties

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2010-2011

2011 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	\$1,633.9	\$287.2	14.9	\$67.4	\$26.1
LINN	683.8	116.0	5.9	27.4	10.1
SCOTT	566.6	86.7	5.8	27.7	8.7
JOHNSON	341.7	51.3	3.4	15.2	5.3
BLACK HAWK	311.3	50.5	2.7	13.0	4.1
FIVE COUNTY TOTAL	\$3,537.3	\$591.8	32.7	\$150.7	\$54.3
STATE TOTALS	\$7,246.5	\$1,120.5	63.4	\$328.8	\$101.4
FIVE COUNTY SHARE	48.8%	52.8%	51.6%	45.8%	53.5%

2010 Travel Impact

POLK	\$1,490.8	\$277.5	14.5	\$65.0	\$24.7
LINN	619.6	111.8	5.8	26.9	9.9
SCOTT	511.2	82.3	5.6	26.6	8.0
JOHNSON	311.2	48.8	3.3	14.4	4.9
BLACK HAWK	285.8	48.9	2.7	12.7	4.0
FIVE COUNTY TOTAL	\$3,218.5	\$569.3	31.9	\$145.7	\$51.5
STATE TOTALS	\$6,568.3	\$1,080.9	62.0	\$321.4	\$96.4
FIVE COUNTY SHARE	49.00%	52.67%	51.45%	45.34%	53.41%

Percent Change - 2011 over 2010

POLK	9.6%	3.5%	2.7%	3.7%	5.5%
LINN	10.4%	3.8%	1.7%	1.6%	2.4%
SCOTT	10.8%	5.4%	3.3%	4.2%	7.9%
JOHNSON	9.8%	5.2%	2.6%	5.0%	7.3%
BLACK HAWK	8.9%	3.3%	1.9%	2.4%	4.0%
FIVE COUNTY TOTAL	9.9%	3.9%	2.5%	3.4%	5.4%
STATE TOTALS	10.3%	3.7%	2.2%	2.3%	5.2%

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 2011 and 2010 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2011 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 2011 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2011.

Table D shows the percent change in 2011 over 2010 estimates for each of the measures of economic impact.

Table E shows the counties listed alphabetically, with 2010 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical by County, 2011

<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	\$15.31	\$1.40	0.09	\$0.59	\$0.10
ADAMS	2.61	0.30	0.02	0.15	0.03
ALLAMAKEE	37.58	3.61	0.20	1.76	0.90
APPANOOSE	16.46	1.95	0.12	0.86	0.22
AUDUBON	4.94	0.48	0.02	0.31	0.05
BENTON	17.95	1.63	0.10	1.07	0.11
BLACK HAWK	311.31	50.53	2.72	13.02	4.15
BOONE	23.64	2.70	0.15	1.32	0.19
BREMER	50.99	6.42	0.45	2.41	0.36
BUCHANAN	25.51	2.54	0.14	1.34	0.27
BUENA VISTA	28.02	3.44	0.20	1.33	0.25
BUTLER	8.69	0.65	0.03	0.50	0.05
CALHOUN	10.36	1.16	0.06	0.61	0.26
CARROLL	54.33	7.12	0.46	2.70	0.40
CASS	25.06	2.61	0.15	1.27	0.17
CEDAR	21.53	2.43	0.14	1.27	0.27
CERRO GORDO	184.06	25.32	1.53	8.35	3.08
CHEROKEE	14.56	2.09	0.13	0.95	0.13
CHICKASAW	9.78	1.45	0.10	0.59	0.11
CLARKE	21.92	2.57	0.17	1.11	0.18
CLAY	90.53	19.70	0.70	2.13	1.15
CLAYTON	30.78	4.32	0.25	1.52	0.59
CLINTON	109.01	15.88	0.97	5.21	1.38
CRAWFORD	19.84	2.98	0.18	1.15	0.18
DALLAS	156.88	23.45	1.53	7.49	1.34
DAVIS	6.36	0.64	0.04	0.32	0.07
DECATUR	13.03	1.15	0.07	0.57	0.11

Table A: Alphabetical by County, 2011

2011 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2011 (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	\$8.19	\$0.81	0.04	\$0.43	\$0.09
DES MOINES	118.25	20.61	1.00	4.71	1.65
DICKINSON	244.12	29.28	1.83	12.20	4.20
DUBUQUE	302.43	47.79	2.80	13.57	4.02
EMMET	10.95	1.39	0.07	0.59	0.13
FAYETTE	16.61	1.69	0.09	0.84	0.13
FLOYD	17.84	2.64	0.12	0.86	0.16
FRANKLIN	11.92	1.19	0.07	0.64	0.07
FREMONT	13.96	1.85	0.12	0.72	0.12
GREENE	5.96	0.65	0.03	0.32	0.07
GRUNDY	4.97	0.66	0.04	0.33	0.04
GUTHRIE	12.56	1.71	0.09	0.94	0.30
HAMILTON	23.09	2.88	0.18	1.16	0.18
HANCOCK	5.86	0.85	0.04	0.33	0.09
HARDIN	20.24	1.90	0.10	0.86	0.14
HARRISON	27.38	3.27	0.23	1.36	0.19
HENRY	19.83	2.74	0.16	0.93	0.27
HOWARD	4.37	0.51	0.03	0.24	0.05
HUMBOLDT	11.17	1.68	0.07	0.39	0.13
IDA	6.12	0.75	0.05	0.38	0.06
IOWA	43.73	6.86	0.46	2.31	0.65
JACKSON	27.30	3.46	0.20	1.47	0.55
JASPER	67.76	8.34	0.51	2.97	0.81
JEFFERSON	36.55	5.32	0.35	1.65	0.30
JOHNSON	341.67	51.28	3.37	15.16	5.28
JONES	20.45	1.94	0.10	1.12	0.14
KEOKUK	4.73	0.42	0.02	0.24	0.05

Table A: Alphabetical by County, 2011

2011 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2011 (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	\$15.37	\$1.64	0.10	\$0.81	\$0.11
LEE	60.10	8.60	0.52	2.94	0.82
LINN	683.78	115.96	5.88	27.36	10.11
LOUISA	13.65	1.72	0.10	0.90	0.33
LUCAS	7.23	0.82	0.05	0.36	0.08
LYON	6.33	0.62	0.03	0.36	0.05
MADISON	12.93	1.10	0.06	0.69	0.12
MAHASKA	17.31	3.13	0.18	1.24	0.26
MARION	45.96	5.60	0.34	2.18	0.36
MARSHALL	79.75	11.47	0.67	3.72	1.02
MILLS	7.55	0.85	0.05	0.52	0.07
MITCHELL	9.53	0.92	0.05	0.45	0.08
MONONA	19.51	3.56	0.20	0.95	0.24
MONROE	8.17	1.39	0.09	0.55	0.10
MONTGOMERY	19.30	3.25	0.21	1.30	0.20
MUSCATINE	76.89	11.37	0.71	3.89	0.89
O'BRIEN	20.28	2.36	0.14	1.05	0.15
OSCEOLA	3.53	0.45	0.03	0.19	0.03
PAGE	18.03	1.76	0.11	0.92	0.17
PALO ALTO	31.85	4.46	0.25	1.82	0.61
PLYMOUTH	21.84	2.46	0.14	1.19	0.16
POCAHONTAS	4.34	0.48	0.03	0.23	0.05
POLK	1,633.88	287.24	14.94	67.45	26.05
POTTAWATTAMIE	283.93	52.11	3.21	15.19	4.27
POWESHIEK	43.29	5.34	0.30	2.29	0.82
RINGGOLD	9.67	0.89	0.04	0.55	0.18
SAC	14.44	1.34	0.07	0.74	0.28

Table A: Alphabetical by County, 2011

2011 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2011 (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	\$566.63	\$86.74	5.81	\$27.74	\$8.66
SHELBY	13.98	1.50	0.09	0.72	0.13
SIOUX	32.72	3.90	0.22	1.67	0.23
STORY	178.83	24.78	1.49	7.61	2.27
TAMA	19.33	3.05	0.18	0.96	0.21
TAYLOR	3.39	0.31	0.02	0.22	0.03
UNION	14.78	1.89	0.12	0.89	0.16
VAN BUREN	6.02	0.78	0.05	0.38	0.07
WAPELLO	75.28	9.44	0.56	3.75	0.93
WARREN	32.53	2.87	0.18	1.56	0.26
WASHINGTON	16.07	1.79	0.11	0.85	0.12
WAYNE	6.64	0.78	0.05	0.46	0.09
WEBSTER	62.97	10.08	0.55	3.01	0.57
WINNEBAGO	11.33	1.02	0.06	0.61	0.08
WINNESHIEK	26.91	4.45	0.31	1.50	0.26
WOODBURY	248.56	43.00	2.07	9.27	3.47
WORTH	6.20	0.42	0.02	0.30	0.04
WRIGHT	16.76	1.79	0.09	0.83	0.26
TOTAL	\$7,246.46	\$1,120.55	63.36	\$328.77	\$101.42

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Table B: Ranking of Counties by Expenditure Levels, 2011

2011 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2011					
<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	\$1,633.88	\$287.24	14.94	\$67.45	\$26.05
LINN	683.78	115.96	5.88	27.36	10.11
SCOTT	566.63	86.74	5.81	27.74	8.66
JOHNSON	341.67	51.28	3.37	15.16	5.28
BLACK HAWK	311.31	50.53	2.72	13.02	4.15
DUBUQUE	302.43	47.79	2.80	13.57	4.02
POTTAWATTAMIE	283.93	52.11	3.21	15.19	4.27
WOODBURY	248.56	43.00	2.07	9.27	3.47
DICKINSON	244.12	29.28	1.83	12.20	4.20
CERRO GORDO	184.06	25.32	1.53	8.35	3.08
STORY	178.83	24.78	1.49	7.61	2.27
DALLAS	156.88	23.45	1.53	7.49	1.34
DES MOINES	118.25	20.61	1.00	4.71	1.65
CLINTON	109.01	15.88	0.97	5.21	1.38
CLAY	90.53	19.70	0.70	2.13	1.15
MARSHALL	79.75	11.47	0.67	3.72	1.02
MUSCATINE	76.89	11.37	0.71	3.89	0.89
WAPELLO	75.28	9.44	0.56	3.75	0.93
JASPER	67.76	8.34	0.51	2.97	0.81
WEBSTER	62.97	10.08	0.55	3.01	0.57
LEE	60.10	8.60	0.52	2.94	0.82
CARROLL	54.33	7.12	0.46	2.70	0.40
BREMER	50.99	6.42	0.45	2.41	0.36
MARION	45.96	5.60	0.34	2.18	0.36
IOWA	43.73	6.86	0.46	2.31	0.65
POWESHIEK	43.29	5.34	0.30	2.29	0.82
ALLAMAKEE	37.58	3.61	0.20	1.76	0.90

Table B: Ranking of Counties by Expenditure Levels, 2011

2011 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2011 (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>
JEFFERSON	\$36.55	\$5.32	0.35	\$1.65	\$0.30
SIOUX	32.72	3.90	0.22	1.67	0.23
WARREN	32.53	2.87	0.18	1.56	0.26
PALO ALTO	31.85	4.46	0.25	1.82	0.61
CLAYTON	30.78	4.32	0.25	1.52	0.59
BUENA VISTA	28.02	3.44	0.20	1.33	0.25
HARRISON	27.38	3.27	0.23	1.36	0.19
JACKSON	27.30	3.46	0.20	1.47	0.55
WINNESHIEK	26.91	4.45	0.31	1.50	0.26
BUCHANAN	25.51	2.54	0.14	1.34	0.27
CASS	25.06	2.61	0.15	1.27	0.17
BOONE	23.64	2.70	0.15	1.32	0.19
HAMILTON	23.09	2.88	0.18	1.16	0.18
CLARKE	21.92	2.57	0.17	1.11	0.18
PLYMOUTH	21.84	2.46	0.14	1.19	0.16
CEDAR	21.53	2.43	0.14	1.27	0.27
JONES	20.45	1.94	0.10	1.12	0.14
O'BRIEN	20.28	2.36	0.14	1.05	0.15
HARDIN	20.24	1.90	0.10	0.86	0.14
CRAWFORD	19.84	2.98	0.18	1.15	0.18
HENRY	19.83	2.74	0.16	0.93	0.27
MONONA	19.51	3.56	0.20	0.95	0.24
TAMA	19.33	3.05	0.18	0.96	0.21
MONTGOMERY	19.30	3.25	0.21	1.30	0.20
PAGE	18.03	1.76	0.11	0.92	0.17
BENTON	17.95	1.63	0.10	1.07	0.11
FLOYD	17.84	2.64	0.12	0.86	0.16

Table B: Ranking of Counties by Expenditure Levels, 2011

2011 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2011 (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>
MAHASKA	\$17.31	\$3.13	0.18	\$1.24	\$0.26
WRIGHT	16.76	1.79	0.09	0.83	0.26
FAYETTE	16.61	1.69	0.09	0.84	0.13
APPANOOSE	16.46	1.95	0.12	0.86	0.22
WASHINGTON	16.07	1.79	0.11	0.85	0.12
KOSSUTH	15.37	1.64	0.10	0.81	0.11
ADAIR	15.31	1.40	0.09	0.59	0.10
UNION	14.78	1.89	0.12	0.89	0.16
CHEROKEE	14.56	2.09	0.13	0.95	0.13
SAC	14.44	1.34	0.07	0.74	0.28
SHELBY	13.98	1.50	0.09	0.72	0.13
FREMONT	13.96	1.85	0.12	0.72	0.12
LOUISA	13.65	1.72	0.10	0.90	0.33
DECATUR	13.03	1.15	0.07	0.57	0.11
MADISON	12.93	1.10	0.06	0.69	0.12
GUTHRIE	12.56	1.71	0.09	0.94	0.30
FRANKLIN	11.92	1.19	0.07	0.64	0.07
WINNEBAGO	11.33	1.02	0.06	0.61	0.08
HUMBOLDT	11.17	1.68	0.07	0.39	0.13
EMMET	10.95	1.39	0.07	0.59	0.13
CALHOUN	10.36	1.16	0.06	0.61	0.26
CHICKASAW	9.78	1.45	0.10	0.59	0.11
RINGGOLD	9.67	0.89	0.04	0.55	0.18
MITCHELL	9.53	0.92	0.05	0.45	0.08
BUTLER	8.69	0.65	0.03	0.50	0.05
DELAWARE	8.19	0.81	0.04	0.43	0.09
MONROE	8.17	1.39	0.09	0.55	0.10

Table B: Ranking of Counties by Expenditure Levels, 2011

2011 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2011 (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>
MILLS	\$7.55	\$0.85	0.05	\$0.52	\$0.07
LUCAS	7.23	0.82	0.05	0.36	0.08
WAYNE	6.64	0.78	0.05	0.46	0.09
DAVIS	6.36	0.64	0.04	0.32	0.07
LYON	6.33	0.62	0.03	0.36	0.05
WORTH	6.20	0.42	0.02	0.30	0.04
IDA	6.12	0.75	0.05	0.38	0.06
VAN BUREN	6.02	0.78	0.05	0.38	0.07
GREENE	5.96	0.65	0.03	0.32	0.07
HANCOCK	5.86	0.85	0.04	0.33	0.09
GRUNDY	4.97	0.66	0.04	0.33	0.04
AUDUBON	4.94	0.48	0.02	0.31	0.05
KEOKUK	4.73	0.42	0.02	0.24	0.05
HOWARD	4.37	0.51	0.03	0.24	0.05
POCAHONTAS	4.34	0.48	0.03	0.23	0.05
OSCEOLA	3.53	0.45	0.03	0.19	0.03
TAYLOR	3.39	0.31	0.02	0.22	0.03
ADAMS	2.61	0.30	0.02	0.15	0.03
TOTAL	\$7,246.46	\$1,120.55	63.36	\$328.77	\$101.42

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Table C: Percent Distribution by County, 2011

2011 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2011					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	0.21%	0.13%	0.15%	0.18%	0.10%
ADAMS	0.04%	0.03%	0.03%	0.05%	0.03%
ALLAMAKEE	0.52%	0.32%	0.31%	0.53%	0.88%
APPANOOSE	0.23%	0.17%	0.18%	0.26%	0.22%
AUDUBON	0.07%	0.04%	0.03%	0.09%	0.05%
BENTON	0.25%	0.15%	0.15%	0.33%	0.11%
BLACK HAWK	4.30%	4.51%	4.30%	3.96%	4.09%
BOONE	0.33%	0.24%	0.24%	0.40%	0.19%
BREMER	0.70%	0.57%	0.71%	0.73%	0.35%
BUCHANAN	0.35%	0.23%	0.22%	0.41%	0.27%
BUENA VISTA	0.39%	0.31%	0.31%	0.41%	0.25%
BUTLER	0.12%	0.06%	0.05%	0.15%	0.05%
CALHOUN	0.14%	0.10%	0.10%	0.18%	0.25%
CARROLL	0.75%	0.64%	0.73%	0.82%	0.40%
CASS	0.35%	0.23%	0.24%	0.39%	0.17%
CEDAR	0.30%	0.22%	0.22%	0.39%	0.27%
CERRO GORDO	2.54%	2.26%	2.41%	2.54%	3.04%
CHEROKEE	0.20%	0.19%	0.20%	0.29%	0.12%
CHICKASAW	0.13%	0.13%	0.15%	0.18%	0.11%
CLARKE	0.30%	0.23%	0.27%	0.34%	0.18%
CLAY	1.25%	1.76%	1.11%	0.65%	1.13%
CLAYTON	0.42%	0.39%	0.40%	0.46%	0.58%
CLINTON	1.50%	1.42%	1.53%	1.58%	1.36%
CRAWFORD	0.27%	0.27%	0.28%	0.35%	0.17%
DALLAS	2.16%	2.09%	2.41%	2.28%	1.33%
DAVIS	0.09%	0.06%	0.06%	0.10%	0.07%
DECATUR	0.18%	0.10%	0.11%	0.17%	0.11%

Table C: Percent Distribution by County, 2011

2011 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2011 (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	1.63%	1.84%	1.57%	1.43%	1.62%
DICKINSON	3.37%	2.61%	2.88%	3.71%	4.14%
DUBUQUE	4.17%	4.26%	4.42%	4.13%	3.97%
EMMET	0.15%	0.12%	0.11%	0.18%	0.13%
FAYETTE	0.23%	0.15%	0.15%	0.26%	0.13%
FLOYD	0.25%	0.24%	0.19%	0.26%	0.16%
FRANKLIN	0.16%	0.11%	0.11%	0.20%	0.07%
FREMONT	0.19%	0.17%	0.18%	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%	0.29%	0.35%	0.18%
HANCOCK	0.08%	0.08%	0.06%	0.10%	0.09%
HARDIN	0.28%	0.17%	0.16%	0.26%	0.14%
HARRISON	0.38%	0.29%	0.36%	0.41%	0.19%
HENRY	0.27%	0.24%	0.25%	0.28%	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%	0.11%	0.06%
IOWA	0.60%	0.61%	0.73%	0.70%	0.64%
JACKSON	0.38%	0.31%	0.32%	0.45%	0.54%
JASPER	0.94%	0.74%	0.81%	0.90%	0.80%
JEFFERSON	0.50%	0.48%	0.55%	0.50%	0.29%
JOHNSON	4.71%	4.58%	5.31%	4.61%	5.21%
JONES	0.28%	0.17%	0.16%	0.34%	0.14%
KEOKUK	0.07%	0.04%	0.03%	0.07%	0.05%

Table C: Percent Distribution by County, 2011

2011 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2011 (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%	0.24%	0.10%
LEE	0.83%	0.77%	0.83%	0.90%	0.80%
LINN	9.44%	10.35%	9.27%	8.32%	9.97%
LOUISA	0.19%	0.15%	0.16%	0.27%	0.33%
LUCAS	0.10%	0.07%	0.08%	0.11%	0.08%
LYON	0.09%	0.06%	0.05%	0.11%	0.05%
MADISON	0.18%	0.10%	0.10%	0.21%	0.12%
MAHASKA	0.24%	0.28%	0.29%	0.38%	0.25%
MARION	0.63%	0.50%	0.54%	0.66%	0.36%
MARSHALL	1.10%	1.02%	1.05%	1.13%	1.01%
MILLS	0.10%	0.08%	0.09%	0.16%	0.07%
MITCHELL	0.13%	0.08%	0.08%	0.14%	0.08%
MONONA	0.27%	0.32%	0.31%	0.29%	0.23%
MONROE	0.11%	0.12%	0.15%	0.17%	0.10%
MONTGOMERY	0.27%	0.29%	0.33%	0.39%	0.20%
MUSCATINE	1.06%	1.01%	1.12%	1.18%	0.87%
O'BRIEN	0.28%	0.21%	0.23%	0.32%	0.15%
OSCEOLA	0.05%	0.04%	0.05%	0.06%	0.03%
PAGE	0.25%	0.16%	0.17%	0.28%	0.16%
PALO ALTO	0.44%	0.40%	0.39%	0.55%	0.60%
PLYMOUTH	0.30%	0.22%	0.22%	0.36%	0.15%
POCAHONTAS	0.06%	0.04%	0.05%	0.07%	0.05%
POLK	22.55%	25.63%	23.57%	20.51%	25.69%
POTTAWATTAMIE	3.92%	4.65%	5.06%	4.62%	4.21%
POWESHIEK	0.60%	0.48%	0.47%	0.70%	0.81%
RINGGOLD	0.13%	0.08%	0.07%	0.17%	0.18%
SAC	0.20%	0.12%	0.11%	0.23%	0.28%

Table C: Percent Distribution by County, 2011

2011 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2011 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	7.82%	7.74%	9.17%	8.44%	8.54%
SHELBY	0.19%	0.13%	0.14%	0.22%	0.13%
SIOUX	0.45%	0.35%	0.35%	0.51%	0.23%
STORY	2.47%	2.21%	2.35%	2.31%	2.24%
TAMA	0.27%	0.27%	0.28%	0.29%	0.20%
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%	0.11%	0.07%
WAPELLO	1.04%	0.84%	0.89%	1.14%	0.92%
WARREN	0.45%	0.26%	0.28%	0.47%	0.26%
WASHINGTON	0.22%	0.16%	0.18%	0.26%	0.12%
WAYNE	0.09%	0.07%	0.08%	0.14%	0.09%
WEBSTER	0.87%	0.90%	0.87%	0.91%	0.56%
WINNEBAGO	0.16%	0.09%	0.10%	0.18%	0.08%
WINNESHIEK	0.37%	0.40%	0.48%	0.46%	0.26%
WOODBURY	3.43%	3.84%	3.27%	2.82%	3.42%
WORTH	0.09%	0.04%	0.04%	0.09%	0.04%
WRIGHT	0.23%	0.16%	0.14%	0.25%	0.25%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2010

2011 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2010					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	10.82%	3.11%	1.07%	0.08%	3.47%
ADAMS	9.62%	1.27%	-0.51%	-1.44%	1.55%
ALLAMAKEE	12.38%	2.43%	0.52%	-1.47%	4.45%
APPANOOSE	12.07%	3.15%	0.90%	0.72%	5.52%
AUDUBON	12.70%	0.91%	-0.35%	-2.97%	1.54%
BENTON	10.68%	-1.40%	-2.43%	-5.23%	-0.34%
BLACK HAWK	8.93%	3.29%	1.91%	2.36%	4.01%
BOONE	13.04%	4.34%	2.21%	2.10%	4.15%
BREMER	11.53%	3.75%	1.21%	0.90%	2.89%
BUCHANAN	12.47%	0.56%	-0.70%	-3.00%	1.49%
BUENA VISTA	8.22%	0.40%	-0.95%	-1.21%	2.67%
BUTLER	13.62%	-0.18%	-0.94%	-4.98%	0.54%
CALHOUN	12.22%	1.59%	0.14%	-2.35%	1.62%
CARROLL	10.38%	4.07%	1.82%	0.89%	1.01%
CASS	10.76%	-0.23%	-1.24%	-2.93%	5.29%
CEDAR	13.82%	2.87%	1.26%	-0.96%	5.32%
CERRO GORDO	12.82%	4.25%	3.92%	5.06%	11.36%
CHEROKEE	8.03%	-0.10%	-2.36%	-1.93%	0.85%
CHICKASAW	9.90%	1.43%	-0.97%	-1.33%	1.65%
CLARKE	11.86%	3.18%	0.77%	0.48%	5.34%
CLAY	8.12%	2.29%	1.47%	1.91%	2.88%
CLAYTON	11.14%	2.13%	1.04%	-1.19%	1.80%
CLINTON	9.24%	2.05%	1.13%	1.04%	4.33%
CRAWFORD	10.08%	1.85%	-0.51%	0.04%	1.75%
DALLAS	10.98%	8.30%	5.87%	8.60%	10.35%
DAVIS	11.05%	1.35%	-0.89%	-2.06%	1.60%
DECATUR	11.11%	1.64%	-0.47%	-1.45%	4.10%

Table D: Percent Change over 2010

**2011 Domestic Travel Impact on Iowa
Table D: Percent Change over 2010 (Continued)**

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	10.74%	1.10%	-0.58%	-1.98%	1.58%
DES MOINES	14.96%	9.14%	8.23%	8.11%	11.08%
DICKINSON	14.60%	5.20%	3.26%	1.75%	7.49%
DUBUQUE	9.86%	5.34%	3.24%	4.13%	6.32%
EMMET	11.77%	-0.53%	-1.69%	-2.38%	0.79%
FAYETTE	14.05%	3.49%	2.15%	0.62%	5.64%
FLOYD	11.70%	0.90%	0.94%	0.85%	5.40%
FRANKLIN	13.16%	1.18%	0.16%	-2.57%	1.91%
FREMONT	8.01%	-0.02%	-2.08%	-2.02%	1.00%
GREENE	11.71%	1.04%	-0.48%	-2.42%	1.61%
GRUNDY	10.14%	0.44%	-1.23%	-2.74%	1.17%
GUTHRIE	12.52%	-0.12%	-0.70%	-2.68%	2.31%
HAMILTON	11.53%	2.18%	-0.08%	0.19%	2.29%
HANCOCK	9.25%	0.17%	-1.01%	-0.64%	1.48%
HARDIN	12.07%	2.36%	1.13%	-0.11%	3.17%
HARRISON	10.47%	2.43%	-0.40%	-0.24%	4.01%
HENRY	9.15%	0.16%	-0.59%	-0.80%	4.53%
HOWARD	8.60%	1.31%	-0.69%	-0.73%	1.70%
HUMBOLDT	6.86%	-1.73%	-1.79%	-1.01%	1.16%
IDA	10.48%	1.22%	-0.87%	-1.70%	1.66%
IOWA	11.13%	2.16%	0.15%	-0.67%	3.49%
JACKSON	12.54%	2.08%	0.68%	-1.11%	1.22%
JASPER	4.58%	-2.70%	-4.58%	-4.96%	-4.37%
JEFFERSON	7.38%	2.32%	0.22%	1.46%	2.32%
JOHNSON	9.79%	5.16%	2.62%	5.04%	7.30%
JONES	14.26%	2.30%	1.19%	-1.70%	3.00%
KEOKUK	10.88%	-0.70%	-2.36%	-4.18%	0.35%

Table D: Percent Change over 2010

2011 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2010 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	10.61%	1.41%	-0.74%	-1.55%	1.80%
LEE	6.46%	-2.68%	-3.44%	-2.86%	3.16%
LINN	10.36%	3.76%	1.66%	1.61%	2.38%
LOUISA	11.50%	0.77%	-0.96%	-3.09%	1.35%
LUCAS	9.49%	1.16%	-0.71%	-1.41%	1.53%
LYON	12.17%	2.75%	0.87%	-0.62%	2.68%
MADISON	13.17%	0.67%	-0.54%	-3.27%	1.55%
MAHASKA	10.21%	1.99%	0.36%	0.17%	2.51%
MARION	13.25%	3.71%	1.78%	1.55%	4.95%
MARSHALL	11.82%	3.05%	1.91%	2.12%	7.87%
MILLS	13.87%	1.67%	-0.37%	-1.35%	6.23%
MITCHELL	10.28%	0.74%	-1.48%	-2.61%	0.83%
MONONA	6.31%	1.71%	1.08%	0.35%	1.66%
MONROE	8.82%	1.64%	-0.74%	-0.56%	1.73%
MONTGOMERY	9.84%	1.47%	-0.90%	-1.03%	1.72%
MUSCATINE	15.45%	7.82%	6.23%	6.89%	15.48%
O'BRIEN	10.28%	1.16%	-0.68%	-1.40%	1.87%
OSCEOLA	10.46%	1.86%	0.30%	-0.92%	1.98%
PAGE	17.40%	7.92%	5.86%	4.23%	19.19%
PALO ALTO	5.76%	2.55%	1.53%	1.04%	2.13%
PLYMOUTH	11.30%	2.12%	0.24%	-0.86%	2.32%
POCAHONTAS	8.44%	-0.09%	-1.65%	-2.57%	0.88%
POLK	9.60%	3.51%	2.67%	3.74%	5.54%
POTTAWATTAMIE	8.02%	2.82%	1.78%	2.25%	3.45%
POWESHIEK	7.58%	-1.38%	-3.45%	-4.12%	-2.64%
RINGGOLD	12.55%	1.31%	-0.41%	-3.11%	1.49%
SAC	10.80%	-0.46%	-1.69%	-4.11%	1.06%

Table D: Percent Change over 2010

2011 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2010 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	10.85%	5.35%	3.25%	4.18%	7.93%
SHELBY	9.66%	0.92%	-1.36%	-1.78%	1.44%
SIOUX	11.08%	2.46%	0.55%	0.91%	4.04%
STORY	10.04%	2.24%	1.09%	1.10%	4.46%
TAMA	7.30%	1.64%	0.54%	-0.51%	1.41%
TAYLOR	13.56%	1.06%	-0.37%	-3.30%	1.62%
UNION	10.91%	2.76%	0.48%	0.31%	3.34%
VAN BUREN	9.90%	1.82%	-0.48%	-0.54%	2.90%
WAPELLO	9.74%	2.05%	0.82%	0.31%	2.40%
WARREN	12.00%	1.67%	-0.21%	-2.11%	1.40%
WASHINGTON	12.35%	3.69%	0.79%	1.70%	2.52%
WAYNE	12.05%	1.29%	-0.58%	-2.56%	1.57%
WEBSTER	11.39%	4.74%	1.75%	-0.35%	4.71%
WINNEBAGO	12.44%	0.85%	-0.78%	-2.89%	1.56%
WINNESHIEK	7.58%	2.01%	-0.31%	0.50%	2.96%
WOODBURY	10.54%	3.91%	2.26%	3.01%	5.74%
WORTH	13.89%	1.17%	0.06%	-3.62%	1.51%
WRIGHT	12.62%	1.97%	0.21%	-1.84%	1.94%
TOTAL	10.32%	3.67%	2.16%	2.28%	5.19%

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Table E: Alphabetical by County, 2010

2010 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2010					
<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	\$13.82	\$1.36	0.09	\$0.59	\$0.10
ADAMS	2.38	0.29	0.02	0.15	0.03
ALLAMAKEE	33.44	3.52	0.20	1.78	0.86
APPANOOSE	14.69	1.89	0.11	0.85	0.21
AUDUBON	4.39	0.48	0.02	0.32	0.05
BENTON	16.22	1.65	0.10	1.13	0.11
BLACK HAWK	285.78	48.92	2.67	12.72	3.99
BOONE	20.91	2.58	0.15	1.30	0.18
BREMER	45.72	6.19	0.44	2.39	0.35
BUCHANAN	22.68	2.53	0.14	1.38	0.27
BUENA VISTA	25.89	3.43	0.20	1.35	0.24
BUTLER	7.65	0.65	0.03	0.53	0.05
CALHOUN	9.23	1.14	0.06	0.62	0.25
CARROLL	49.23	6.84	0.45	2.67	0.40
CASS	22.63	2.61	0.16	1.31	0.16
CEDAR	18.91	2.36	0.14	1.29	0.26
CERRO GORDO	163.15	24.29	1.47	7.95	2.77
CHEROKEE	13.48	2.10	0.13	0.97	0.12
CHICKASAW	8.90	1.43	0.10	0.60	0.11
CLARKE	19.59	2.50	0.17	1.10	0.17
CLAY	83.73	19.26	0.69	2.09	1.11
CLAYTON	27.70	4.23	0.25	1.54	0.58
CLINTON	99.79	15.56	0.96	5.16	1.32
CRAWFORD	18.02	2.92	0.18	1.15	0.17
DALLAS	141.36	21.65	1.44	6.90	1.22
DAVIS	5.73	0.63	0.04	0.33	0.07
DECATUR	11.72	1.13	0.07	0.57	0.11

Table E: Alphabetical by County, 2010

2010 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2010 (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	\$7.40	\$0.81	0.04	\$0.44	\$0.09
DES MOINES	102.86	18.89	0.92	4.36	1.48
DICKINSON	213.03	27.83	1.77	11.99	3.91
DUBUQUE	275.28	45.37	2.71	13.03	3.78
EMMET	9.79	1.40	0.07	0.61	0.13
FAYETTE	14.56	1.63	0.09	0.84	0.12
FLOYD	15.97	2.62	0.12	0.85	0.15
FRANKLIN	10.54	1.18	0.07	0.66	0.07
FREMONT	12.93	1.85	0.12	0.74	0.12
GREENE	5.33	0.64	0.03	0.33	0.07
GRUNDY	4.51	0.66	0.04	0.34	0.04
GUTHRIE	11.16	1.71	0.09	0.96	0.30
HAMILTON	20.71	2.82	0.18	1.16	0.18
HANCOCK	5.36	0.85	0.04	0.33	0.09
HARDIN	18.06	1.86	0.10	0.86	0.13
HARRISON	24.78	3.20	0.23	1.36	0.18
HENRY	18.17	2.74	0.16	0.94	0.26
HOWARD	4.03	0.50	0.03	0.24	0.05
HUMBOLDT	10.45	1.71	0.07	0.39	0.13
IDA	5.54	0.74	0.05	0.38	0.06
IOWA	39.35	6.72	0.46	2.33	0.63
JACKSON	24.26	3.39	0.20	1.48	0.54
JASPER	64.79	8.57	0.54	3.12	0.85
JEFFERSON	34.03	5.20	0.35	1.63	0.29
JOHNSON	311.21	48.76	3.28	14.43	4.92
JONES	17.90	1.90	0.10	1.14	0.13
KEOKUK	4.26	0.42	0.02	0.25	0.05

Table E: Alphabetical by County, 2010

2010 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2010 (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	\$13.89	\$1.62	0.10	\$0.82	\$0.10
LEE	56.46	8.84	0.54	3.03	0.79
LINN	619.57	111.76	5.78	26.93	9.88
LOUISA	12.25	1.71	0.10	0.92	0.33
LUCAS	6.60	0.81	0.05	0.36	0.08
LYON	5.64	0.60	0.03	0.36	0.05
MADISON	11.43	1.09	0.06	0.71	0.12
MAHASKA	15.71	3.07	0.18	1.24	0.25
MARION	40.58	5.40	0.33	2.15	0.35
MARSHALL	71.32	11.13	0.65	3.64	0.95
MILLS	6.63	0.83	0.06	0.53	0.06
MITCHELL	8.64	0.91	0.05	0.46	0.08
MONONA	18.35	3.50	0.20	0.95	0.23
MONROE	7.51	1.37	0.09	0.55	0.10
MONTGOMERY	17.57	3.20	0.21	1.31	0.20
MUSCATINE	66.60	10.54	0.67	3.64	0.77
O'BRIEN	18.39	2.33	0.14	1.06	0.14
OSCEOLA	3.20	0.44	0.03	0.19	0.03
PAGE	15.35	1.63	0.10	0.88	0.14
PALO ALTO	30.12	4.35	0.24	1.80	0.60
PLYMOUTH	19.62	2.41	0.14	1.20	0.15
POCAHONTAS	4.01	0.48	0.03	0.24	0.05
POLK	1,490.79	277.50	14.55	65.01	24.68
POTTAWATTAMIE	262.85	50.68	3.15	14.85	4.13
POWESHIEK	40.24	5.42	0.31	2.39	0.84
RINGGOLD	8.59	0.88	0.04	0.56	0.18
SAC	13.03	1.34	0.07	0.78	0.28

Table E: Alphabetical by County, 2010

2010 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2010 (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	\$511.18	\$82.33	5.63	\$26.63	\$8.02
SHELBY	12.75	1.49	0.09	0.73	0.13
SIOUX	29.46	3.80	0.22	1.66	0.22
STORY	162.51	24.24	1.47	7.53	2.17
TAMA	18.02	3.00	0.18	0.97	0.20
TAYLOR	2.99	0.31	0.02	0.23	0.03
UNION	13.33	1.84	0.12	0.88	0.15
VAN BUREN	5.48	0.77	0.05	0.38	0.07
WAPELLO	68.60	9.25	0.56	3.73	0.91
WARREN	29.04	2.83	0.18	1.59	0.26
WASHINGTON	14.30	1.73	0.11	0.83	0.11
WAYNE	5.92	0.77	0.05	0.47	0.09
WEBSTER	56.53	9.63	0.54	3.02	0.54
WINNEBAGO	10.08	1.01	0.06	0.63	0.08
WINNESHIEK	25.02	4.37	0.31	1.50	0.26
WOODBURY	224.86	41.38	2.03	9.00	3.28
WORTH	5.45	0.41	0.02	0.31	0.04
WRIGHT	14.88	1.76	0.09	0.85	0.25
TOTAL	\$6,568.33	\$1,080.92	62.02	\$321.44	\$96.41

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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 RELATED INDUSTRY BY NAICS

Accommodations

- 7211 Traveler Accommodations
- 7212 Recreational Vehicle Parks & Campgrounds

Auto Transportation

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

Entertainment and Recreation

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

Food

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

Public Transportation

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

Retail

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

Travel Arrangement

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

Appendix D: Sources of Data

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

Organizations

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