

The Economic Impact of Travel on Iowa Counties 2017

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.
September 2018

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 2017 and 2016 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 2017 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, 2016 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 2017 will become available subsequent to this study, U.S. Travel Association reserves the right to revise these estimates in the future.

EXECUTIVE SUMMARY

- Domestic travel spending in Iowa totaled \$8.5 billion (in current dollars) in 2017, representing an increase of 3.3 percent from 2016.
- Total payroll income received by domestic travel-generated employees and workers in Iowa increased 2.9 percent from 2016 to nearly \$1.4 billion in 2017.
- Domestic traveler expenditures directly generated 69,600 jobs in Iowa during 2017, a 0.2 percent increase from 2016. Domestic travel-generated jobs in Iowa comprised 4.4 percent of total state non-farm employment in 2017.
- On average, every \$122,178 spent by domestic travelers in Iowa during 2017 supported one job. Likewise, every dollar spent by domestic travelers produced 16.3 cents in payroll income for Iowa residents in 2017.
- Domestic traveler spending in Iowa directly generated \$1,105.7 million in federal, state, and local tax revenue in 2017, up 1.1 percent from 2016.
- Polk County, which includes the city of Des Moines, generated more than \$2.0 billion in domestic traveler expenditures to lead all Iowa counties in 2017.
- Fifteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2017. Fourteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

NATIONAL SUMMARY 2017

After edging up at a seasonally-adjusted annual rate of 1.2 percent during the first quarter of the year, U.S. economic growth accelerated to 3.0 percent growth during the latter three quarters of 2017. As a result, U.S. real GDP increased by 2.3 percent in 2017, which was faster than 2016's 1.5 percent growth.

The improvement in 2017 was largely thanks to upticks in business investment and exports. Business investment increased by 4.7 percent in 2017 (compared to a 0.6 percent decrease in 2016) and exports increased 3.4 percent in 2017 (compared to a 0.3 percent decrease in 2016). Consumer spending remained strong throughout the years, and increased by 2.8 percent, slightly faster than the 2.7 percent increase in 2016. On the other hand, resident investment slowed down to 1.8 percent growth in 2017 (compared to 5.5 percent in 2016) and government spending increased by a meager 0.1 percent (compared to 0.8 percent in 2016).

The economy's strong performance in 2017 was supported by a healthy and fully recovered labor market. Overall nonfarm employment grew by 2.1 million in 2017, to 146.4 million. This is slightly less than the 2.5 million jobs added in 2016. Part of 2017's deceleration in job growth was due to the hurricanes that impacted the Southeast in September. In 2017, the economy generated 171,000 jobs per month, on average, which was less than the monthly average of 187,000 in 2016.

The U.S. unemployment rate fell to just 4.4 percent in 2017, the lowest point since it reached 4.0 percent in 2000. Another encouraging sign is that 78.6 percent of Americans in their prime working years (25-54 years) were employed in 2017, the highest share since 2008. A tightening labor market put upward pressure on wages. Average hourly earnings in the private sector increased by 2.7 percent in 2017, the fastest annual pace since 2009.

The Conference Board's consumer confidence ended 2017 at 122.1, a number slightly below the 17-year high reached in November. Optimism in the labor market remained strong and helped boost consumer confidence at the end of 2017. For the year, consumer confidence averaged 120.4 in 2017, up 21 percent from the 2016 average of 99.6.

The Consumer Price Index (CPI), one measure of price levels, increased by 2.1 percent in 2017, up from 1.2 percent in 2016. Excluding food and volatile energy prices, core CPI increased by 1.9 percent.

The cost of travel in 2017, as measured by the U.S. Travel Association's Travel Price Index, increased by 2.3 percent in 2017, after it remained nearly flat (+0.3%) in 2016. A 12.9 percent increase in motor fuel was tempered by milder price increases in other travel-related components such as lodging as well as recreational and food/beverage services, and a 2.4 percent decline in airline fares.

Table 1: Overall U.S. Economic Indicators, 2015-2017

<u>Sector</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Nominal gross domestic product (\$ Billions)	18,219.3	18,707.2	19,485.4
Real gross domestic product (\$ Billions) *	17,386.7	17,659.2	18,050.7
Real disposable personal income (\$ Billions) *	13,366.5	13,595.2	13,949.2
Real personal consumption expenditures (\$ Billions) *	11,921.9	12,248.2	12,558.7
Consumer price index**	237.1	240.0	245.1
Travel Price Index**	272.4	273.1	279.4
Nonfarm payroll employment (Millions)	145.8	147.9	149.7
Unemployment rate (%)	5.3	4.9	4.4
<i>Percentage change from previous year</i>			
Nominal gross domestic product	4.0%	2.7%	4.2%
Real gross domestic product	2.9%	1.6%	2.2%
Real disposable personal income	4.1%	1.7%	2.6%
Real personal consumption expenditures	3.7%	2.7%	2.5%
Consumer price index	0.1%	1.2%	2.1%
Travel Price Index	-2.6%	0.3%	2.3%
Non-farm payroll employment	3.4%	1.9%	4.3%

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

* In chained 2012 dollars

** 1982-84=100

U.S. Travel Volume in 2017

U.S. domestic travel, including leisure and business travel, increased by 1.9 percent to a total of 2.3 billion person-trips in 2017. A person-trip is defined as one person on a trip away from home overnight in paid accommodations, or on a day or overnight trip to places 50 miles or more, one-way, away from home.

Domestic leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, increased 2.1 percent in 2017 to nearly 1.8 billion person-trips and is forecasted to increase 1.9 percent in 2018. Leisure travel accounted for 80 percent of all U.S. domestic travel in 2017. Domestic business travel increased by 1.3 percent in 2017 to 462 million person-trips and is expected to increase 2.1 percent in 2018.

International inbound travelers, including overnight visitors from Canada, Mexico and overseas, made 76.5 million visits to the United States in 2017. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 38.5 million in 2017 and accounted for half of total international arrivals to the United States, according to U.S. Travel Association estimates. Canadian overnight arrivals to the U.S increased from 19.3 million in 2016 to 20.2 million in 2017 (+4.8%), while Mexican overnight arrivals decreased from 19.0 million in 2016 to 17.8 million in 2017 (-6.1%).

Travel Expenditures in 2017

Total domestic and international travelers spending in the U.S. increased 4.4 percent, growing from \$992 billion in 2016 to \$1,036 billion in 2017, not adjusted for inflation (excluding international airfare payments to the U.S. airlines). The U.S. Travel Association expects total domestic and international traveler expenditures to pick up to 5.0 percent growth in 2018.

Domestic travel expenditures grew 5.2 percent in 2017 to \$880 billion. International traveler spending in the U.S. remained flat (+0.1%) and totaled \$156 billion in 2017. It should be noted here that this traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenses on education, health care and expenditures by cross-border day-trip visitors and seasonal workers. International traveler spending is expected to increase by 4.7 percent in 2018.

International airfare receipts are total passenger fares paid by international residents on U.S. flag air carriers. In 2017, international airfare receipts totaled \$40.6 billion, up 3.4 percent from 2016.

Leisure traveler spending (domestic and international) totaled \$717 billion in 2017, up 4.7 percent from 2016 (not adjusted for inflation). Leisure travelers accounted for 69 percent of all traveler expenditures. Business traveler spending increased 3.7 percent to \$319 billion in 2017.

Table 2: Travel Expenditures - U.S. Nationwide

Category	2016 Spending (\$ Billions)			2017 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$167.3	\$16.4	\$183.6	\$175.6	\$16.4	\$192.0
Auto Transportation	139.4	1.9	141.4	149.4	1.9	151.4
Lodging	163.8	47.6	211.4	172.3	48.9	221.1
Foodservice	215.9	33.0	248.9	224.8	32.8	257.5
Entertainment & Recreation	88.1	13.5	101.6	93.3	13.5	106.8
General Retail Trade	62.2	43.2	105.4	64.6	42.3	106.9
Total	\$836.6	\$155.6	\$992.3	\$879.9	\$155.8	\$1,035.8

Source: U.S. Travel Association

* Excludes international passenger fare payments.

Travel Employment in 2017

After making a full recovery from the 2007-2009 recession in February 2015, the economy built on its past gains, and a new high of 146.4 million nonfarm jobs was reached in 2017 (based on data from the Labor Department). After peaking at 9.6 percent in 2010, the unemployment rate fell to an average monthly rate of 4.4 percent in 2017, starting at 4.8 percent in January and ending at 4.1 percent in December. The unemployment rate remained at 4.1 percent through March 2018, and then dipped to 3.9 and 3.8 percent in April and May, respectively. It reversed a bit and settled at 4.0 in June 2018, but still remains significantly below than the 4.4 percent pre-recession low.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery, accounting for 86.3 percent of the jobs recovered from 2010 to 2017. The travel industry joined healthcare; administrative services; accommodation and foodservices; and retail trade as one of the leading growth industries in terms of overall jobs created from 2010 to 2017. Travel accounted for 9.0 percent of nonfarm jobs created from 2010 to 2017, despite holding a 6 percent share of all nonfarm jobs in 2017.

In 2017, traveler spending directly supported nearly 8.8 million U.S. jobs, including both full-time and seasonal/part-time positions, up 2.1 percent from 2016. This increase translated into over 182,000 jobs added to the U.S. economy, accounting for 10 percent of total non-farm job growth since 2016.

These 8.8 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2017 national unemployment rate of 4.4 percent would more than double to 10.0 percent of the civilian labor force.

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

Category	2016 Employment (Thousands)			2017 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	966.6	76.7	1,043.3	992.2	76.2	1,068.5
Auto Transportation	294.7	2.4	297.1	299.8	2.4	302.2
Lodging	1,309.3	271.5	1,580.8	1,341.1	276.0	1,617.1
Foodservice	3,048.9	444.9	3,493.7	3,134.5	445.2	3,579.7
Entertainment & Recreation	1,216.7	242.1	1,458.8	1,252.0	239.2	1,491.2
General Retail Trade	371.6	170.2	541.9	373.4	165.0	538.4
Travel Planning	182.2	0.0	182.2	182.6	0.0	182.6
Total	7,390.0	1,207.8	8,597.8	7,575.6	1,204.0	8,779.7

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

U.S. Travel Forecast

Table 4: U.S. Travel Forecasts

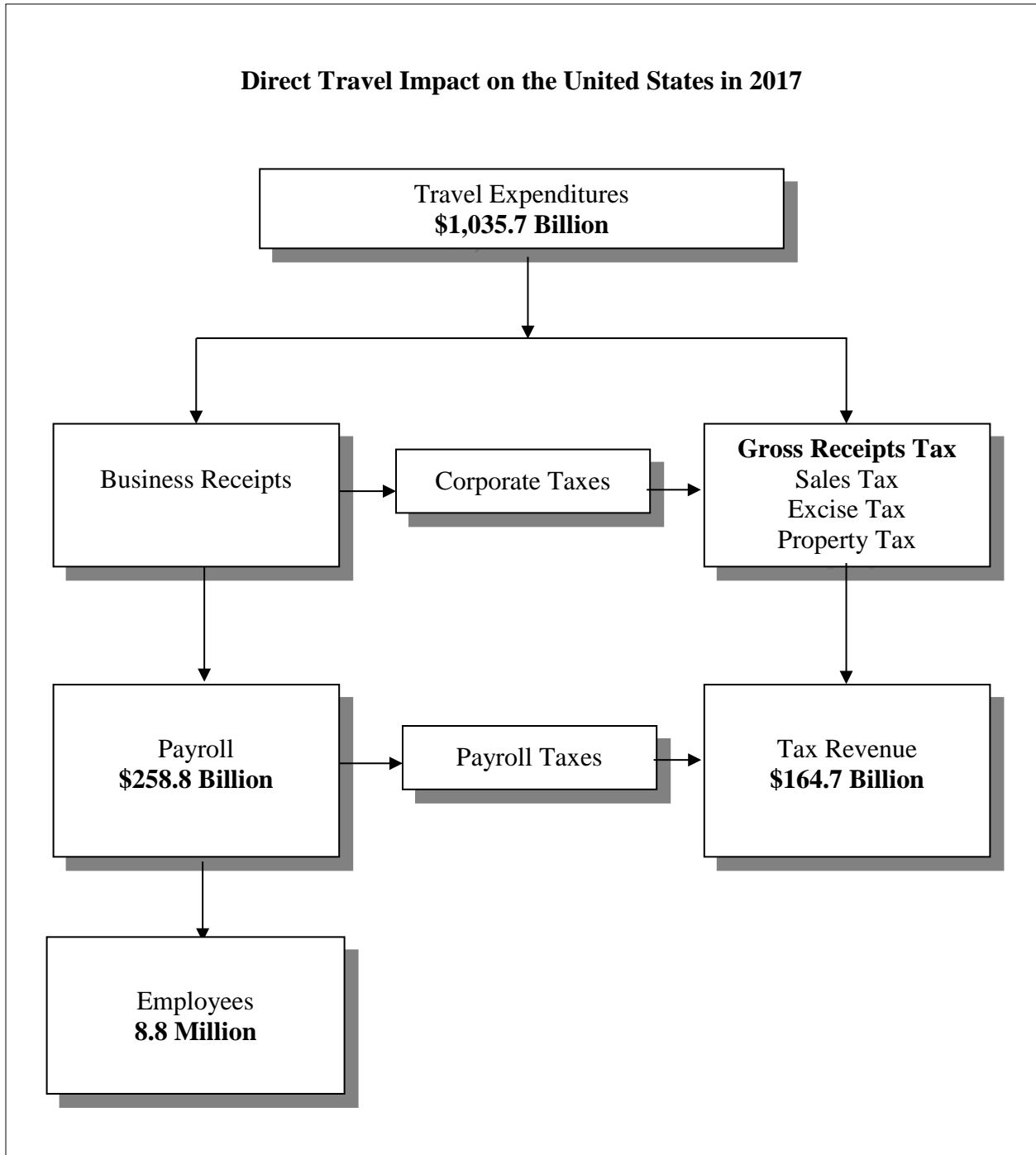
	2016	2017	2018	2019	2020	2021	2022
Nominal GDP (\$ Billions)	18,625	19,391	20,267	20,954	21,626	22,370	23,172
Unemployment Rate (%)	4.9%	4.4%	3.8%	3.6%	3.8%	3.9%	4.0%
Consumer Price Index (CPI)*	240.0	245.1	251.3	256.3	261.3	266.4	271.8
Travel Price Index (TPI)*	273.1	279.4	285.9	289.8	295.3	301.9	307.6
Total Travel Expenditures in U.S. (\$ Billions)	992.3	1,035.7	1,086.8	1,135.1	1,181.2	1,227.9	1,272.2
U.S. Residents	836.6	879.9	924.7	964.5	1,000.7	1,038.1	1,072.9
International Visitors**	155.6	155.8	163.2	171.6	181.6	191.0	200.5
Total International Visitors to the U.S. (Millions)	75.9	76.5	79.2	82.1	85.3	88.6	91.9
Overseas Arrivals to the U.S. (Millions)	37.6	38.5	39.7	41.7	43.7	45.7	47.6
Total Domestic Person-Trips*** (Millions)	2,206.6	2,248.7	2,292.8	2,334.5	2,369.4	2,404.7	2,445.2
Business	456.1	462.0	471.5	479.5	485.6	491.9	499.4
Leisure	1,750.4	1,786.7	1,821.2	1,855.1	1,883.9	1,912.8	1,945.8
Percent Change from Previous Year (%)							
Real GDP	1.5%	2.3%	3.0%	2.3%	1.5%	1.6%	1.8%
Consumer Price Index (CPI)	1.2%	2.1%	2.5%	2.0%	1.9%	2.0%	2.0%
Travel Price Index (TPI)	0.3%	2.3%	2.3%	1.4%	1.9%	2.2%	1.9%
Total Travel Expenditures in U.S.	1.9%	4.4%	5.0%	4.4%	4.1%	4.0%	3.6%
U.S. Residents	2.9%	5.2%	5.1%	4.3%	3.8%	3.7%	3.4%
International Visitors	-2.7%	0.1%	4.7%	5.2%	5.8%	5.2%	5.0%
Total International Visitors to the U.S.	-2.1%	0.8%	3.5%	3.7%	3.9%	3.8%	3.7%
Overseas Arrivals to the U.S.	-2.1%	2.3%	3.2%	5.1%	4.8%	4.5%	4.1%
Total Domestic Person-Trips	1.3%	1.9%	2.0%	1.8%	1.5%	1.5%	1.7%
Business	-0.8%	1.3%	2.1%	1.7%	1.3%	1.3%	1.5%
Leisure	1.8%	2.1%	1.9%	1.9%	1.6%	1.5%	1.7%

Source: U.S. Travel Association's Travel Forecast Model, BLS, Department of Labor; OTTI, BEA, Department of Commerce, Tourism Economics.

* 1982-84=100

** Excludes international traveler spending on medical, educational and cross-border/seasonal work-related activities or international passenger fares on U.S.

*** One person trip of 50 miles or more, one way, away from home or including one or more nights away from home.



DOMESTIC TRAVEL IMPACT ON IOWA

TRAVEL EXPENDITURES

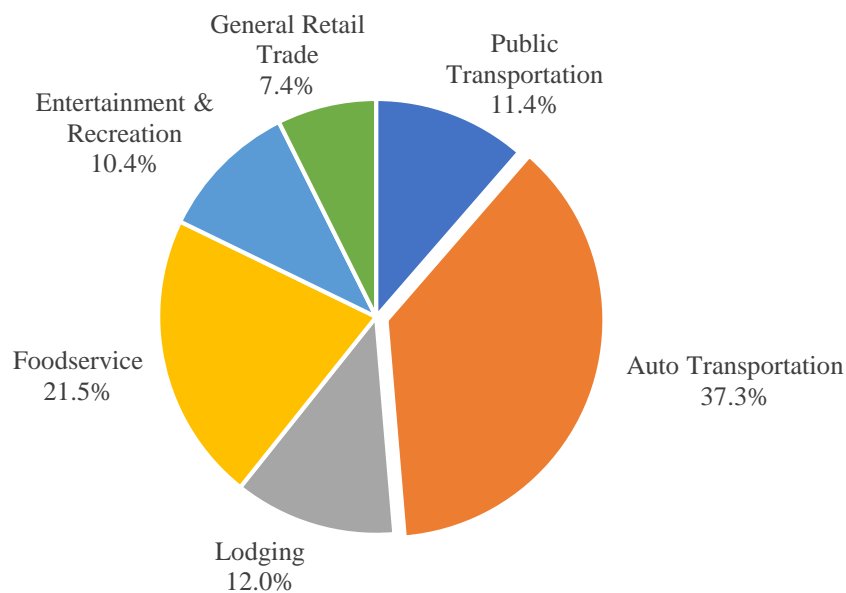
Domestic traveler spending in Iowa totaled nearly \$8.5 billion (in current dollars) during 2017, representing an increase of 3.3 percent from 2016.

Auto transportation, foodservices and lodging are the top three spending categories for domestic travelers in Iowa. Domestic travelers spent \$3.2 billion on auto transportation, up 6.0 percent from 2016. This sector accounted for 37.3 percent of total domestic travelers' spending in Iowa.

Accounting for 21.5 percent of the state total domestic traveler expenditures, spending on foodservice rose 1.6 percent to \$1.8 billion in 2017. Domestic travelers' spending on lodging grew 0.5 percent to \$1.0 billion in 2017.

In 2017, domestic travelers' spending on public transportation was up 4.5 percent from 2016 to \$966.8 million. Domestic travelers spent \$886.2 million on the entertainment and recreation sector in 2017, up 1.7 percent from 2016. Domestic travelers' spending on general retail increased 1.0 percent to \$626.4 million in 2017.

**Domestic Travel Expenditures in Iowa in 2017
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, 2016-2017

<i>2017 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
Public Transportation	\$966.8	11.4%
Auto Transportation	3,169.5	37.3%
Lodging	1,024.0	12.0%
Foodservice	1,826.5	21.5%
Entertainment & Recreation	886.2	10.4%
General Retail Trade	626.4	7.4%
Total	\$8,499.5	100.0%
 <i>2016 Travel Expenditures</i>		
Public Transportation	\$925.4	11.3%
Auto Transportation	2,991.3	36.4%
Lodging	1,018.4	12.4%
Foodservice	1,797.9	21.9%
Entertainment & Recreation	871.7	10.6%
General Retail Trade	620.5	7.5%
Total	\$8,225.2	100.0%
 <i>Percent Change 2017 over 2016</i>		
Public Transportation	4.5%	
Auto Transportation	6.0%	
Lodging	0.5%	
Foodservice	1.6%	
Entertainment & Recreation	1.7%	
General Retail Trade	1.0%	
Total	3.3%	

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

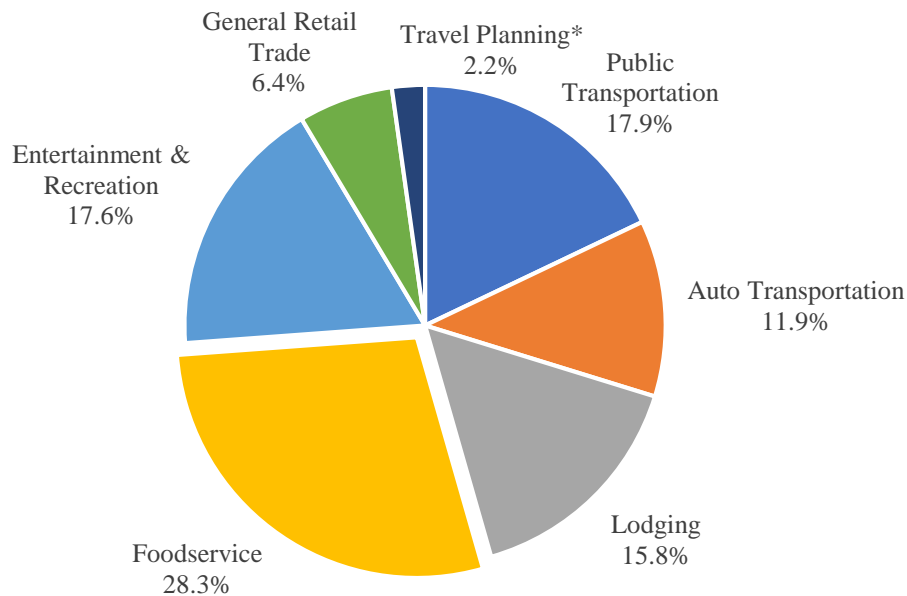
Travel-generated payroll is defined as the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry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

In 2017, total payroll income received by domestic travel-generated employees and workers in Iowa increased 2.9 percent from 2016 to almost \$1.4 billion. On the average, every dollar spent by domestic travelers produced 16.3 cents in payroll income in Iowa during 2017.

The foodservice sector, which posted the highest share of payroll (28.3%) among the seven industry sectors investigated in this report, was up by 3.7 percent from 2016 to \$392.7 million.

Public transportation, the second largest sector (17.9%) in the Iowa travel industry by domestic travel-generated payroll, increased 3.6 percent from 2016 to \$249 million. The entertainment and recreation sector followed very closely, reaching \$244.5 million in 2017.

**Domestic Travel-Generated Payroll in Iowa in 2017
by Industry Sector**



Domestic Travel Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2016-2017

<i>2017 Payroll</i>	<u>Total</u> <u>(\$ Millions)</u>	<u>% of Total</u> <u>(Percent)</u>
Public Transportation	\$249.0	17.9%
Auto Transportation	164.7	11.9%
Lodging	219.5	15.8%
Foodservice	392.7	28.3%
Entertainment & Recreation	244.5	17.6%
General Retail Trade	88.4	6.4%
Travel Planning*	30.8	2.2%
Total	\$1,389.6	100.0%
 <i>2016 Payroll</i>		
Public Transportation	\$240.3	17.8%
Auto Transportation	158.5	11.5%
Lodging	212.6	13.7%
Foodservice	378.7	26.5%
Entertainment & Recreation	243.5	20.8%
General Retail Trade	86.2	6.5%
Travel Planning*	30.8	2.6%
Total	\$1,350.5	100.0%
 <i>Percent Change</i> <i>2017 over 2016</i>		
Public Transportation	3.6%	
Auto Transportation	3.9%	
Lodging	3.3%	
Foodservice	3.7%	
Entertainment & Recreation	0.4%	
General Retail Trade	2.6%	
Travel Planning*	0.0%	
Total	2.9%	

Source: U.S. Travel Association

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

TRAVEL-GENERATED EMPLOYMENT

The most impressive contribution of travel and tourism to the Iowa economy is the number of businesses and jobs it supports. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations. Including full-time and seasonal/part-time positions, the state's domestic travel-generated jobs in 2017 increased 0.2 percent from 2016 to 69,600.

On the average, every \$122,178 spent by domestic travelers in Iowa directly supported one job in 2017.

The 69,600 jobs supported by domestic travel in Iowa comprised 4.4 percent of state's total non-agricultural employment during 2017. Without these jobs generated by domestic travel, Iowa's 2017 unemployment rate of 3.13 percent would have been 4.14 percentage points higher, or 7.27 percent of the labor force.

The foodservice sector that includes restaurants and other eating and drinking establishments provided more jobs than any other industry sector investigated in this report. During 2017, 26,100 jobs in this sector were supported directly by domestic travel in Iowa, accounting for 37.6 percent of total domestic travel-generated jobs in the state. Employment in this sector increased 0.6 percent from 2016.

Domestic travel directly supported 13,600 jobs in the entertainment and recreation sector in 2017, the second largest component of the state total. The lodging sector supported 12,400 jobs in 2017.

**Domestic Travel-Generated Employment in Iowa in 2017
by Industry Sector**

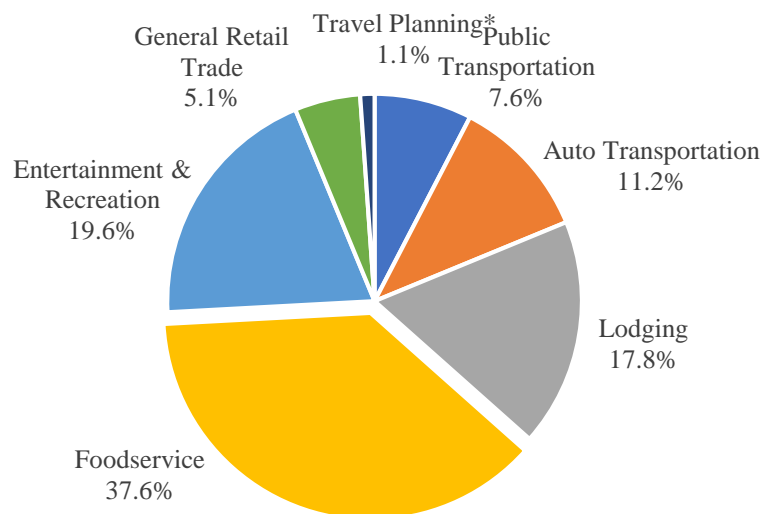


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2016-2017

2017 Employment	Total (Thousand)	% of Total (Percent)
Public Transportation	5.3	7.6%
Auto Transportation	7.8	11.2%
Lodging	12.4	17.8%
Foodservice	26.1	37.6%
Entertainment & Recreation	13.6	19.6%
General Retail Trade	3.6	5.1%
Travel Planning*	0.8	1.1%
Total	69.6	100.0%
2016 Employment		
Public Transportation	5.3	7.6%
Auto Transportation	7.8	11.2%
Lodging	12.3	17.7%
Foodservice	26.0	37.4%
Entertainment & Recreation	13.8	19.8%
General Retail Trade	3.6	5.1%
Travel Planning*	0.8	1.1%
Total	69.5	100.0%
Percent Change 2017 over 2016		
Public Transportation	0.7%	
Auto Transportation	-0.5%	
Lodging	0.8%	
Foodservice	0.6%	
Entertainment & Recreation	-0.8%	
General Retail Trade	-0.3%	
Travel Planning*	-1.7%	
Total	0.2%	

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

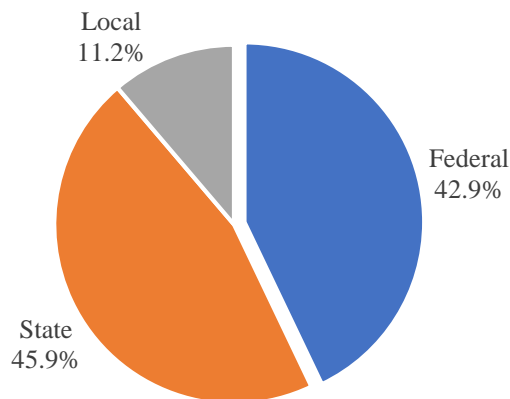
Travel tax receipts are defined in this report as the federal, state and local tax revenues attributable to travel spending in Iowa. Travel-generated tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public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

In 2017, total tax revenues directly generated by domestic travelers' spending in Iowa grew 1.1 percent from 2016 to a total of \$1,105.7 million. The federal government collected a total of \$474.4 million from domestic traveler spending, an increase of 1.1 percent. The tax revenue collected by the federal government accounted for 42.9 percent of all domestic travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.6 cents for federal tax coffers.

The tax revenue generated by domestic travelers' spending for Iowa's state treasury rose 1.0 percent to a total of \$507.1 million, accounting for 45.9 percent of all domestic travel-generated tax revenue for 2017. On average, each domestic travel dollar produced 6.0 cents in tax revenue for Iowa's state government.

The tax revenue collected by the local governments (counties and cities) was 1.8 percent higher than in 2016, for a total of \$124.2 million. Each domestic travel dollar produced 1.5 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in Iowa in 2017
by Level of Government**



Domestic Travel-Generated Tax Revenue

Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2016-2017

<i>2017 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$474.4	42.9%
State	507.1	45.9%
Local	124.2	11.2%
Total	\$1,105.7	100.0%
<i>2016 Tax Revenue</i>		
Federal	\$469.4	42.9%
State	502.3	45.9%
Local	122.0	11.2%
Total	\$1,093.6	100.0%
<i>Percent Change 2017 over 2016</i>		
Federal	1.1%	
State	1.0%	
Local	1.8%	
Total	1.1%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2017, domestic travel expenditures in Iowa totaled close to \$8.5 billion (in current dollars), representing an increase of 3.3 percent from 2016. This spending directly generated 69,600 jobs and nearly \$1.4 billion in payroll income. Additionally, a total of \$631.3 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 nearly \$4.3 billion in direct domestic travel expenditures, accounting for one half of the state total (50.4 percent). Domestic travel spending in the top five counties generated \$757.3 million in payroll (54.5 percent of the state total) and 37,000 jobs (53.2 percent of the state total) in 2017.

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 2017. Domestic traveler expenditures in Polk County reached more than \$2 billion, accounting for 23.8 percent of the state total. These expenditures generated \$375.9 million in payroll income and 17,300 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$819.5 million in domestic travel spending in 2017, representing 9.6 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$145.8 million and 6,500 jobs.

Scott County posted \$659.1 million in domestic expenditures to rank third. These expenditures generated \$108.3 million in payroll as well as 6,400 jobs within the county.

Johnson County ranked fourth with \$412.4 million in domestic travel expenditures. These travel expenditures benefited county residents with \$66.2 million in payroll income and 3,800 jobs.

Black Hawk County ranked fifth by domestic travel spending in 2017. Domestic travelers spent \$368.6 million in the county, generating \$61.1 million in payroll income and 3,000 jobs.

Domestic Travel Impact on Iowa - Top 5 Counties

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2016-2017

2017 Travel Impact

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
POLK	\$2,022.4	\$375.9	17.3	\$109.9	\$33.4
LINN	819.5	145.8	6.5	43.7	12.6
SCOTT	659.1	108.3	6.4	43.1	10.5
JOHNSON	412.4	66.2	3.8	24.5	6.6
BLACK HAWK	368.6	61.1	3.0	19.6	5.1
FIVE COUNTY TOTALS	\$4,282.0	\$757.3	37.0	\$240.8	\$68.2
STATE TOTALS	\$8,499.5	\$1,389.6	69.6	\$507.1	\$124.2
FIVE COUNTY SHARES	50.4%	54.5%	53.2%	47.5%	54.9%

2016 Travel Impact

POLK	\$1,953.9	\$364.6	17.2	\$108.6	\$32.8
LINN	787.9	140.7	6.5	43.0	12.3
SCOTT	638.2	105.3	6.4	42.7	10.3
JOHNSON	399.6	64.4	3.8	24.3	6.5
BLACK HAWK	360.0	59.9	3.0	19.6	5.0
FIVE COUNTY TOTALS	\$4,139.6	\$735.1	36.9	\$238.3	\$67.0
STATE TOTALS	\$8,225.2	\$1,350.5	69.5	\$502.3	\$122.0
FIVE COUNTY SHARES	50.3%	54.4%	53.1%	47.4%	54.9%

Percent Change - 2017 over 2016

POLK	3.5%	3.1%	0.3%	1.1%	1.9%
LINN	4.0%	3.6%	0.8%	1.6%	2.4%
SCOTT	3.3%	2.8%	0.1%	0.9%	1.7%
JOHNSON	3.2%	2.8%	0.0%	0.8%	1.6%
BLACK HAWK	2.4%	1.9%	-0.8%	0.0%	0.8%
FIVE COUNTY TOTALS	3.4%	3.0%	0.3%	1.0%	1.9%
STATE TOTALS	3.3%	2.9%	0.2%	1.0%	1.8%

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 2016 and 2017 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2017 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

Table B ranks the counties in order of 2017 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2017.

Table D shows the percent change in 2017 over 2016 estimates for each of the measures of economic impact.

Table E shows the counties listed alphabetically, with 2016 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2017					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
ADAIR	\$17.10	\$1.67	0.10	\$0.84	\$0.12
ADAMS	2.77	0.33	0.02	0.21	0.03
ALLAMAKEE	42.74	4.29	0.21	2.65	1.05
APPANOOSE	18.41	2.28	0.12	1.25	0.25
AUDUBON	5.27	0.58	0.02	0.44	0.06
BENTON	18.80	1.81	0.10	1.50	0.12
BLACK HAWK	368.57	61.10	2.95	19.64	5.08
BOONE	26.61	3.19	0.16	1.97	0.22
BREMER	56.61	7.44	0.46	3.46	0.41
BUCHANAN	27.82	2.78	0.14	1.95	0.31
BUENA VISTA	29.18	3.83	0.20	1.83	0.27
BUTLER	8.95	0.74	0.03	0.70	0.05
CALHOUN	10.64	1.28	0.06	0.83	0.27
CARROLL	60.43	8.04	0.46	3.82	0.46
CASS	27.88	3.11	0.16	1.86	0.20
CEDAR	22.82	2.66	0.13	1.78	0.30
CERRO GORDO	201.78	28.40	1.55	11.89	3.51
CHEROKEE	15.16	2.31	0.12	1.30	0.13
CHICKASAW	10.86	1.71	0.10	0.85	0.12
CLARKE	26.05	3.16	0.18	1.71	0.22
CLAY	109.22	24.27	0.75	3.19	1.42
CLAYTON	34.57	4.75	0.25	2.27	0.69
CLINTON	121.49	17.95	1.00	7.55	1.60
CRAWFORD	21.43	3.48	0.18	1.64	0.20
DALLAS	194.74	31.99	1.85	11.99	1.73
DAVIS	7.34	0.73	0.04	0.48	0.09
DECATUR	13.13	1.12	0.06	0.76	0.12

Table A: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2017 (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	8.90	0.96	0.05	0.62	0.10
DES MOINES	138.93	25.47	1.07	7.08	2.02
DICKINSON	286.11	36.20	2.01	18.92	5.21
DUBUQUE	351.76	57.90	3.00	20.23	4.83
EMMET	11.53	1.54	0.07	0.82	0.14
FAYETTE	17.52	1.86	0.09	1.16	0.14
FLOYD	18.97	2.95	0.12	1.20	0.18
FRANKLIN	12.23	1.35	0.07	0.89	0.08
FREMONT	15.61	2.19	0.12	1.03	0.14
GREENE	6.63	0.74	0.03	0.48	0.08
GRUNDY	5.42	0.78	0.04	0.48	0.05
GUTHRIE	13.38	2.00	0.10	1.35	0.34
HAMILTON	25.02	3.29	0.18	1.63	0.20
HANCOCK	6.46	0.97	0.04	0.48	0.10
HARDIN	23.08	2.26	0.10	1.28	0.16
HARRISON	28.39	3.67	0.22	1.89	0.20
HENRY	22.33	3.40	0.17	1.40	0.32
HOWARD	4.82	0.59	0.03	0.35	0.06
HUMBOLDT	12.52	2.07	0.07	0.57	0.15
IDA	6.53	0.90	0.05	0.54	0.07
IOWA	44.27	7.14	0.43	3.14	0.69
JACKSON	32.52	4.52	0.24	2.36	0.69
JASPER	74.42	9.88	0.54	4.37	0.93
JEFFERSON	41.06	6.42	0.37	2.48	0.34
JOHNSON	412.37	66.23	3.83	24.48	6.65
JONES	22.41	2.26	0.11	1.65	0.16
KEOKUK	4.96	0.48	0.02	0.34	0.06

Table A: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa						
Table A: Alphabetical by County, 2017 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
KOSSUTH	17.85	1.95	0.11	1.25	0.13	
LEE	61.82	9.59	0.51	4.10	0.90	
LINN	819.49	145.75	6.54	43.74	12.61	
LOUISA	14.30	1.85	0.09	1.25	0.36	
LUCAS	8.10	0.95	0.05	0.54	0.09	
LYON	6.69	0.68	0.03	0.51	0.06	
MADISON	14.30	1.29	0.07	1.02	0.13	
MAHASKA	18.91	3.86	0.20	1.82	0.29	
MARION	52.20	6.77	0.36	3.35	0.43	
MARSHALL	88.37	13.55	0.69	5.47	1.17	
MILLS	8.55	1.04	0.06	0.80	0.08	
MITCHELL	11.24	1.19	0.06	0.71	0.10	
MONONA	19.94	3.31	0.17	1.29	0.25	
MONROE	8.69	1.58	0.09	0.79	0.11	
MONTGOMERY	21.75	3.94	0.22	1.94	0.24	
MUSCATINE	83.74	13.11	0.72	5.80	1.04	
O'BRIEN	23.04	2.97	0.16	1.59	0.17	
OSCEOLA	3.67	0.46	0.03	0.26	0.04	
PAGE	18.72	1.91	0.10	1.28	0.18	
PALO ALTO	35.87	5.26	0.27	2.70	0.70	
PLYMOUTH	25.73	3.06	0.16	1.87	0.19	
POCAHONTAS	4.59	0.53	0.03	0.33	0.05	
POLK	2,022.41	375.87	17.26	109.86	33.44	
POTTAWATTAMIE	312.95	58.11	3.21	22.25	4.86	
POWESHIEK	49.99	6.43	0.32	3.55	0.99	
RINGGOLD	10.67	1.03	0.05	0.81	0.21	
SAC	16.02	1.59	0.08	1.11	0.32	

Table A: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa						
Table A: Alphabetical by County, 2017 (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	659.14	108.33	6.41	43.08	10.45	
SHELBY	15.01	1.75	0.09	1.03	0.14	
SIOUX	37.78	4.97	0.25	2.60	0.28	
STORY	212.40	31.65	1.69	12.14	2.83	
TAMA	21.47	3.45	0.19	1.41	0.24	
TAYLOR	3.45	0.34	0.02	0.31	0.03	
UNION	15.62	2.21	0.12	1.25	0.17	
VAN BUREN	6.92	0.93	0.05	0.56	0.09	
WAPELLO	86.86	11.96	0.64	5.82	1.14	
WARREN	39.25	3.74	0.21	2.54	0.33	
WASHINGTON	16.51	1.95	0.11	1.16	0.12	
WAYNE	7.46	0.93	0.05	0.69	0.11	
WEBSTER	69.12	11.67	0.58	4.48	0.66	
WINNEBAGO	11.94	1.10	0.06	0.85	0.09	
WINNESHIEK	31.92	5.86	0.35	2.38	0.32	
WOODBURY	311.38	55.54	2.41	15.55	4.59	
WORTH	6.89	0.53	0.03	0.44	0.04	
<u>WRIGHT</u>	<u>18.29</u>	<u>2.03</u>	<u>0.09</u>	<u>1.21</u>	<u>0.29</u>	
STATE TOTALS	\$8,499.52	\$1,389.57	69.57	\$507.10	\$124.18	

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Table B: Ranking of Counties by Expenditure Levels, 2017

2017 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2017					
<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	\$2,022.41	\$375.87	17.26	\$109.86	\$33.44
LINN	819.49	145.75	6.54	43.74	12.61
SCOTT	659.14	108.33	6.41	43.08	10.45
JOHNSON	412.37	66.23	3.83	24.48	6.65
BLACK HAWK	368.57	61.10	2.95	19.64	5.08
DUBUQUE	351.76	57.90	3.00	20.23	4.83
POTTAWATTAMIE	312.95	58.11	3.21	22.25	4.86
WOODBURY	311.38	55.54	2.41	15.55	4.59
DICKINSON	286.11	36.20	2.01	18.92	5.21
STORY	212.40	31.65	1.69	12.14	2.83
CERRO GORDO	201.78	28.40	1.55	11.89	3.51
DALLAS	194.74	31.99	1.85	11.99	1.73
DES MOINES	138.93	25.47	1.07	7.08	2.02
CLINTON	121.49	17.95	1.00	7.55	1.60
CLAY	109.22	24.27	0.75	3.19	1.42
MARSHALL	88.37	13.55	0.69	5.47	1.17
WAPELLO	86.86	11.96	0.64	5.82	1.14
MUSCATINE	83.74	13.11	0.72	5.80	1.04
JASPER	74.42	9.88	0.54	4.37	0.93
WEBSTER	69.12	11.67	0.58	4.48	0.66
LEE	61.82	9.59	0.51	4.10	0.90
CARROLL	60.43	8.04	0.46	3.82	0.46
BREMER	56.61	7.44	0.46	3.46	0.41
MARION	52.20	6.77	0.36	3.35	0.43
POWESHIEK	49.99	6.43	0.32	3.55	0.99
IOWA	44.27	7.14	0.43	3.14	0.69
ALLAMAKEE	42.74	4.29	0.21	2.65	1.05

Table B: Ranking of Counties by Expenditure Levels, 2017

2017 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2017 (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	41.06	6.42	0.37	2.48	0.34	
WARREN	39.25	3.74	0.21	2.54	0.33	
SIOUX	37.78	4.97	0.25	2.60	0.28	
PALO ALTO	35.87	5.26	0.27	2.70	0.70	
CLAYTON	34.57	4.75	0.25	2.27	0.69	
JACKSON	32.52	4.52	0.24	2.36	0.69	
WINNESHIEK	31.92	5.86	0.35	2.38	0.32	
BUENA VISTA	29.18	3.83	0.20	1.83	0.27	
HARRISON	28.39	3.67	0.22	1.89	0.20	
CASS	27.88	3.11	0.16	1.86	0.20	
BUCHANAN	27.82	2.78	0.14	1.95	0.31	
BOONE	26.61	3.19	0.16	1.97	0.22	
CLARKE	26.05	3.16	0.18	1.71	0.22	
PLYMOUTH	25.73	3.06	0.16	1.87	0.19	
HAMILTON	25.02	3.29	0.18	1.63	0.20	
HARDIN	23.08	2.26	0.10	1.28	0.16	
O'BRIEN	23.04	2.97	0.16	1.59	0.17	
CEDAR	22.82	2.66	0.13	1.78	0.30	
JONES	22.41	2.26	0.11	1.65	0.16	
HENRY	22.33	3.40	0.17	1.40	0.32	
MONTGOMERY	21.75	3.94	0.22	1.94	0.24	
TAMA	21.47	3.45	0.19	1.41	0.24	
CRAWFORD	21.43	3.48	0.18	1.64	0.20	
MONONA	19.94	3.31	0.17	1.29	0.25	
FLOYD	18.97	2.95	0.12	1.20	0.18	
MAHASKA	18.91	3.86	0.20	1.82	0.29	
BENTON	18.80	1.81	0.10	1.50	0.12	

Table B: Ranking of Counties by Expenditure Levels, 2017

2017 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2017 (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	18.72	1.91	0.10	1.28	0.18	
APPANOOSE	18.41	2.28	0.12	1.25	0.25	
WRIGHT	18.29	2.03	0.09	1.21	0.29	
KOSSUTH	17.85	1.95	0.11	1.25	0.13	
FAYETTE	17.52	1.86	0.09	1.16	0.14	
ADAIR	17.10	1.67	0.10	0.84	0.12	
WASHINGTON	16.51	1.95	0.11	1.16	0.12	
SAC	16.02	1.59	0.08	1.11	0.32	
UNION	15.62	2.21	0.12	1.25	0.17	
FREMONT	15.61	2.19	0.12	1.03	0.14	
CHEROKEE	15.16	2.31	0.12	1.30	0.13	
SHELBY	15.01	1.75	0.09	1.03	0.14	
MADISON	14.30	1.29	0.07	1.02	0.13	
LOUISA	14.30	1.85	0.09	1.25	0.36	
GUTHRIE	13.38	2.00	0.10	1.35	0.34	
DECATUR	13.13	1.12	0.06	0.76	0.12	
HUMBOLDT	12.52	2.07	0.07	0.57	0.15	
FRANKLIN	12.23	1.35	0.07	0.89	0.08	
WINNEBAGO	11.94	1.10	0.06	0.85	0.09	
EMMET	11.53	1.54	0.07	0.82	0.14	
MITCHELL	11.24	1.19	0.06	0.71	0.10	
CHICKASAW	10.86	1.71	0.10	0.85	0.12	
RINGGOLD	10.67	1.03	0.05	0.81	0.21	
CALHOUN	10.64	1.28	0.06	0.83	0.27	
BUTLER	8.95	0.74	0.03	0.70	0.05	
DELAWARE	8.90	0.96	0.05	0.62	0.10	
MONROE	8.69	1.58	0.09	0.79	0.11	

Table B: Ranking of Counties by Expenditure Levels, 2017

2017 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2017 (Continued)					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
MILLS	8.55	1.04	0.06	0.80	0.08
LUCAS	8.10	0.95	0.05	0.54	0.09
WAYNE	7.46	0.93	0.05	0.69	0.11
DAVIS	7.34	0.73	0.04	0.48	0.09
VAN BUREN	6.92	0.93	0.05	0.56	0.09
WORTH	6.89	0.53	0.03	0.44	0.04
LYON	6.69	0.68	0.03	0.51	0.06
GREENE	6.63	0.74	0.03	0.48	0.08
IDA	6.53	0.90	0.05	0.54	0.07
HANCOCK	6.46	0.97	0.04	0.48	0.10
GRUNDY	5.42	0.78	0.04	0.48	0.05
AUDUBON	5.27	0.58	0.02	0.44	0.06
KEOKUK	4.96	0.48	0.02	0.34	0.06
HOWARD	4.82	0.59	0.03	0.35	0.06
POCAHONTAS	4.59	0.53	0.03	0.33	0.05
OSCEOLA	3.67	0.46	0.03	0.26	0.04
TAYLOR	3.45	0.34	0.02	0.31	0.03
<u>ADAMS</u>	<u>2.77</u>	<u>0.33</u>	<u>0.02</u>	<u>0.21</u>	<u>0.03</u>
STATE TOTALS	\$8,499.52	\$1,389.57	69.57	\$507.10	\$124.18

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Table C: Percent Distribution by County, 2017

2017 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2017					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	0.20%	0.12%	0.14%	0.17%	0.10%
ADAMS	0.03%	0.02%	0.03%	0.04%	0.03%
ALLAMAKEE	0.50%	0.31%	0.30%	0.52%	0.85%
APPANOOSE	0.22%	0.16%	0.17%	0.25%	0.20%
AUDUBON	0.06%	0.04%	0.03%	0.09%	0.04%
BENTON	0.22%	0.13%	0.14%	0.30%	0.10%
BLACK HAWK	4.34%	4.40%	4.24%	3.87%	4.09%
BOONE	0.31%	0.23%	0.23%	0.39%	0.18%
BREMER	0.67%	0.54%	0.66%	0.68%	0.33%
BUCHANAN	0.33%	0.20%	0.19%	0.38%	0.25%
BUENA VISTA	0.34%	0.28%	0.28%	0.36%	0.22%
BUTLER	0.11%	0.05%	0.04%	0.14%	0.04%
CALHOUN	0.13%	0.09%	0.09%	0.16%	0.22%
CARROLL	0.71%	0.58%	0.66%	0.75%	0.37%
CASS	0.33%	0.22%	0.23%	0.37%	0.16%
CEDAR	0.27%	0.19%	0.19%	0.35%	0.24%
CERRO GORDO	2.37%	2.04%	2.23%	2.34%	2.83%
CHEROKEE	0.18%	0.17%	0.18%	0.26%	0.11%
CHICKASAW	0.13%	0.12%	0.14%	0.17%	0.10%
CLARKE	0.31%	0.23%	0.26%	0.34%	0.18%
CLAY	1.29%	1.75%	1.08%	0.63%	1.14%
CLAYTON	0.41%	0.34%	0.36%	0.45%	0.56%
CLINTON	1.43%	1.29%	1.43%	1.49%	1.29%
CRAWFORD	0.25%	0.25%	0.26%	0.32%	0.16%
DALLAS	2.29%	2.30%	2.65%	2.36%	1.39%
DAVIS	0.09%	0.05%	0.05%	0.10%	0.07%
DECATUR	0.15%	0.08%	0.09%	0.15%	0.10%

Table C: Percent Distribution by County, 2017

2017 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2017 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	0.10%	0.07%	0.07%	0.12%	0.08%
DES MOINES	1.63%	1.83%	1.54%	1.40%	1.63%
DICKINSON	3.37%	2.61%	2.88%	3.73%	4.19%
DUBUQUE	4.14%	4.17%	4.31%	3.99%	3.89%
EMMET	0.14%	0.11%	0.10%	0.16%	0.11%
FAYETTE	0.21%	0.13%	0.13%	0.23%	0.11%
FLOYD	0.22%	0.21%	0.17%	0.24%	0.14%
FRANKLIN	0.14%	0.10%	0.10%	0.17%	0.06%
FREMONT	0.18%	0.16%	0.17%	0.20%	0.12%
GREENE	0.08%	0.05%	0.05%	0.09%	0.06%
GRUNDY	0.06%	0.06%	0.06%	0.09%	0.04%
GUTHRIE	0.16%	0.14%	0.14%	0.27%	0.27%
HAMILTON	0.29%	0.24%	0.26%	0.32%	0.16%
HANCOCK	0.08%	0.07%	0.05%	0.09%	0.08%
HARDIN	0.27%	0.16%	0.15%	0.25%	0.13%
HARRISON	0.33%	0.26%	0.32%	0.37%	0.16%
HENRY	0.26%	0.24%	0.25%	0.28%	0.26%
HOWARD	0.06%	0.04%	0.04%	0.07%	0.04%
HUMBOLDT	0.15%	0.15%	0.11%	0.11%	0.12%
IDA	0.08%	0.06%	0.08%	0.11%	0.06%
IOWA	0.52%	0.51%	0.61%	0.62%	0.56%
JACKSON	0.38%	0.33%	0.34%	0.47%	0.55%
JASPER	0.88%	0.71%	0.78%	0.86%	0.75%
JEFFERSON	0.48%	0.46%	0.53%	0.49%	0.28%
JOHNSON	4.85%	4.77%	5.50%	4.83%	5.35%
JONES	0.26%	0.16%	0.16%	0.33%	0.13%
KEOKUK	0.06%	0.03%	0.03%	0.07%	0.04%

Table C: Percent Distribution by County, 2017

2017 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2017 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	0.21%	0.14%	0.16%	0.25%	0.10%
LEE	0.73%	0.69%	0.73%	0.81%	0.72%
LINN	9.64%	10.49%	9.40%	8.63%	10.16%
LOUISA	0.17%	0.13%	0.14%	0.25%	0.29%
LUCAS	0.10%	0.07%	0.07%	0.11%	0.07%
LYON	0.08%	0.05%	0.05%	0.10%	0.05%
MADISON	0.17%	0.09%	0.09%	0.20%	0.11%
MAHASKA	0.22%	0.28%	0.29%	0.36%	0.23%
MARION	0.61%	0.49%	0.52%	0.66%	0.35%
MARSHALL	1.04%	0.97%	1.00%	1.08%	0.94%
MILLS	0.10%	0.07%	0.09%	0.16%	0.06%
MITCHELL	0.13%	0.09%	0.09%	0.14%	0.08%
MONONA	0.23%	0.24%	0.24%	0.25%	0.20%
MONROE	0.10%	0.11%	0.13%	0.16%	0.09%
MONTGOMERY	0.26%	0.28%	0.32%	0.38%	0.19%
MUSCATINE	0.99%	0.94%	1.04%	1.14%	0.84%
O'BRIEN	0.27%	0.21%	0.23%	0.31%	0.14%
OSCEOLA	0.04%	0.03%	0.04%	0.05%	0.03%
PAGE	0.22%	0.14%	0.14%	0.25%	0.15%
PALO ALTO	0.42%	0.38%	0.38%	0.53%	0.57%
PLYMOUTH	0.30%	0.22%	0.22%	0.37%	0.15%
POCAHONTAS	0.05%	0.04%	0.04%	0.06%	0.04%
POLK	23.79%	27.05%	24.81%	21.66%	26.93%
POTTAWATTAMIE	3.68%	4.18%	4.62%	4.39%	3.91%
POWESHIEK	0.59%	0.46%	0.46%	0.70%	0.80%
RINGGOLD	0.13%	0.07%	0.06%	0.16%	0.17%
SAC	0.19%	0.11%	0.11%	0.22%	0.26%

Table C: Percent Distribution by County, 2017

2017 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2017 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	7.76%	7.80%	9.21%	8.49%	8.42%
SHELBY	0.18%	0.13%	0.13%	0.20%	0.11%
SIOUX	0.44%	0.36%	0.36%	0.51%	0.23%
STORY	2.50%	2.28%	2.44%	2.39%	2.28%
TAMA	0.25%	0.25%	0.27%	0.28%	0.19%
TAYLOR	0.04%	0.02%	0.03%	0.06%	0.03%
UNION	0.18%	0.16%	0.18%	0.25%	0.14%
VAN BUREN	0.08%	0.07%	0.07%	0.11%	0.07%
WAPELLO	1.02%	0.86%	0.92%	1.15%	0.92%
WARREN	0.46%	0.27%	0.29%	0.50%	0.26%
WASHINGTON	0.19%	0.14%	0.16%	0.23%	0.10%
WAYNE	0.09%	0.07%	0.08%	0.14%	0.09%
WEBSTER	0.81%	0.84%	0.83%	0.88%	0.53%
WINNEBAGO	0.14%	0.08%	0.09%	0.17%	0.07%
WINNESHIEK	0.38%	0.42%	0.51%	0.47%	0.26%
WOODBURY	3.66%	4.00%	3.47%	3.07%	3.69%
WORTH	0.08%	0.04%	0.04%	0.09%	0.03%
<u>WRIGHT</u>	<u>0.22%</u>	<u>0.15%</u>	<u>0.13%</u>	<u>0.24%</u>	<u>0.23%</u>
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2016

2017 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2016					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	4.93%	4.49%	1.71%	2.51%	3.33%
ADAMS	3.74%	3.32%	0.57%	1.35%	2.17%
ALLAMAKEE	6.28%	5.85%	3.03%	3.83%	4.67%
APPANOOSE	5.73%	5.29%	2.49%	3.29%	4.12%
AUDUBON	4.53%	4.10%	1.33%	2.12%	2.94%
BENTON	2.95%	2.53%	-0.20%	0.58%	1.39%
BLACK HAWK	2.37%	1.95%	-0.77%	0.01%	0.81%
BOONE	1.94%	1.52%	-1.18%	-0.41%	0.39%
BREMER	4.49%	4.06%	1.29%	2.08%	2.90%
BUCHANAN	4.94%	4.51%	1.72%	2.52%	3.34%
BUENA VISTA	1.21%	0.79%	-1.89%	-1.13%	-0.33%
BUTLER	4.99%	4.55%	1.77%	2.56%	3.39%
CALHOUN	2.94%	2.51%	-0.21%	0.56%	1.37%
CARROLL	5.12%	4.61%	1.71%	2.70%	3.52%
CASS	5.85%	5.42%	2.61%	3.41%	4.25%
CEDAR	5.15%	4.71%	1.93%	2.72%	3.55%
CERRO GORDO	2.88%	2.45%	-0.27%	0.51%	1.32%
CHEROKEE	3.24%	2.82%	0.08%	0.86%	1.68%
CHICKASAW	4.79%	4.36%	1.59%	2.38%	3.20%
CLARKE	3.58%	3.15%	0.41%	1.19%	2.00%
CLAY	2.21%	1.79%	-0.92%	-0.15%	0.65%
CLAYTON	4.05%	3.62%	0.86%	1.65%	2.47%
CLINTON	1.80%	1.38%	-1.31%	-0.54%	0.26%
CRAWFORD	0.13%	-0.28%	-2.93%	-2.18%	-1.39%
DALLAS	2.36%	1.94%	-0.31%	0.00%	0.80%
DAVIS	5.10%	4.67%	1.88%	2.67%	3.50%
DECATUR	3.50%	3.08%	0.33%	1.11%	1.93%

Table D: Percent Change over 2016

2017 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2016 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DELAWARE	3.55%	3.12%	0.38%	1.16%	1.97%
DES MOINES	1.85%	1.43%	-1.27%	-0.50%	0.30%
DICKINSON	4.21%	3.78%	1.02%	1.81%	2.63%
DUBUQUE	4.03%	3.60%	0.85%	1.63%	2.45%
EMMET	3.83%	3.40%	0.65%	1.43%	2.25%
FAYETTE	3.26%	2.83%	0.10%	0.88%	1.69%
FLOYD	1.88%	1.46%	-1.24%	-0.47%	0.33%
FRANKLIN	4.41%	3.98%	1.21%	2.00%	2.82%
FREMONT	3.04%	2.61%	-0.12%	0.66%	1.47%
GREENE	3.86%	3.43%	0.68%	1.47%	2.28%
GRUNDY	4.13%	3.70%	0.94%	1.72%	2.54%
GUTHRIE	4.77%	4.34%	1.56%	2.35%	3.18%
HAMILTON	4.79%	4.36%	1.58%	2.37%	3.20%
HANCOCK	2.93%	2.50%	-0.22%	0.55%	1.36%
HARDIN	4.29%	3.86%	1.10%	1.89%	2.71%
HARRISON	1.95%	1.53%	-1.17%	-0.40%	0.40%
HENRY	1.19%	0.77%	-1.91%	-1.15%	-0.35%
HOWARD	3.34%	2.92%	0.18%	0.96%	1.77%
HUMBOLDT	2.00%	1.58%	-1.12%	-0.35%	0.45%
IDA	3.32%	2.89%	0.15%	0.93%	1.75%
IOWA	3.40%	2.98%	0.24%	1.02%	1.83%
JACKSON	2.51%	2.08%	-0.63%	0.14%	0.95%
JASPER	1.05%	0.63%	-2.05%	-1.28%	-0.49%
JEFFERSON	1.52%	1.10%	-1.59%	-0.82%	-0.02%
JOHNSON	3.21%	2.78%	0.05%	0.83%	1.64%
JONES	4.94%	4.50%	1.72%	2.52%	3.34%
KEOKUK	4.12%	3.70%	0.94%	1.72%	2.54%

Table D: Percent Change over 2016

2017 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2016 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
KOSSUTH	3.95%	3.52%	0.76%	1.55%	2.37%
LEE	0.77%	0.35%	-2.32%	-1.56%	-0.76%
LINN	4.01%	3.58%	0.82%	1.61%	2.43%
LOUISA	4.39%	3.96%	1.19%	1.98%	2.80%
LUCAS	5.01%	4.58%	1.80%	2.59%	3.42%
LYON	3.19%	2.77%	0.03%	0.81%	1.62%
MADISON	4.66%	4.23%	1.46%	2.25%	3.07%
MAHASKA	1.17%	0.76%	-1.92%	-1.16%	-0.36%
MARION	1.68%	1.26%	-1.43%	-0.66%	0.14%
MARSHALL	-1.39%	-1.80%	-4.41%	-3.67%	-2.89%
MILLS	5.09%	4.66%	1.88%	2.67%	3.50%
MITCHELL	5.44%	5.01%	2.21%	3.01%	3.84%
MONONA	2.99%	2.57%	-0.16%	0.62%	1.43%
MONROE	3.44%	3.02%	0.28%	1.06%	1.87%
MONTGOMERY	3.06%	2.63%	-0.10%	0.68%	1.49%
MUSCATINE	4.17%	3.74%	0.98%	1.77%	2.59%
O'BRIEN	3.40%	2.97%	0.23%	1.01%	1.82%
OSCEOLA	4.16%	3.73%	0.97%	1.76%	2.58%
PAGE	4.98%	4.55%	1.77%	2.56%	3.39%
PALO ALTO	4.25%	3.82%	1.06%	1.84%	2.66%
PLYMOUTH	4.15%	3.72%	0.96%	1.74%	2.56%
POCAHONTAS	3.73%	3.30%	0.55%	1.33%	2.15%
POLK	3.51%	3.08%	0.34%	1.12%	1.93%
POTTAWATTAMIE	3.53%	3.10%	0.36%	1.14%	1.96%
POWESHIEK	5.07%	4.64%	1.86%	2.65%	3.48%
RINGGOLD	3.65%	3.23%	0.48%	1.26%	2.08%
SAC	4.09%	3.66%	0.90%	1.69%	2.50%

Table D: Percent Change over 2016

2017 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2016 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	3.27%	2.85%	0.11%	0.89%	1.71%
SHELBY	3.48%	3.06%	0.31%	1.10%	1.91%
SIOUX	3.03%	2.60%	-0.13%	0.65%	1.46%
STORY	2.83%	2.40%	-0.05%	0.46%	1.27%
TAMA	2.30%	1.88%	-0.83%	-0.06%	0.75%
TAYLOR	4.99%	4.56%	1.78%	2.57%	3.40%
UNION	3.07%	2.64%	-0.09%	0.69%	1.50%
VAN BUREN	4.40%	3.97%	1.21%	1.99%	2.82%
WAPELLO	1.50%	1.08%	-1.60%	-0.84%	-0.04%
WARREN	4.73%	4.30%	1.52%	2.32%	3.14%
WASHINGTON	3.08%	2.66%	-0.08%	0.70%	1.51%
WAYNE	5.02%	4.59%	1.81%	2.60%	3.43%
WEBSTER	3.43%	3.00%	0.09%	1.04%	1.86%
WINNEBAGO	4.79%	4.36%	1.58%	2.37%	3.20%
WINNESHIEK	4.76%	4.33%	1.55%	2.34%	3.17%
WOODBURY	3.94%	3.51%	0.76%	1.54%	2.36%
WORTH	5.06%	4.62%	1.84%	2.63%	3.46%
<u>WRIGHT</u>	<u>4.39%</u>	<u>3.96%</u>	<u>1.19%</u>	<u>1.98%</u>	<u>2.80%</u>
STATE TOTALS	3.33%	2.89%	0.16%	0.96%	1.80%

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Table E: Alphabetical by County, 2016

2016 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2016					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
ADAIR	\$16.30	\$1.59	0.09	\$0.82	\$0.11
ADAMS	2.67	0.32	0.02	0.21	0.03
ALLAMAKEE	40.21	4.05	0.20	2.55	1.01
APPANOOSE	17.41	2.16	0.12	1.21	0.24
AUDUBON	5.04	0.55	0.02	0.43	0.05
BENTON	18.26	1.77	0.10	1.49	0.12
BLACK HAWK	360.05	59.94	2.97	19.64	5.03
BOONE	26.10	3.14	0.17	1.98	0.22
BREMER	54.18	7.15	0.45	3.39	0.40
BUCHANAN	26.51	2.66	0.13	1.90	0.30
BUENA VISTA	28.83	3.80	0.20	1.85	0.27
BUTLER	8.53	0.70	0.03	0.68	0.05
CALHOUN	10.34	1.25	0.06	0.83	0.27
CARROLL	57.49	7.68	0.45	3.72	0.44
CASS	26.34	2.95	0.16	1.80	0.19
CEDAR	21.71	2.54	0.13	1.73	0.29
CERRO GORDO	196.13	27.72	1.56	11.83	3.46
CHEROKEE	14.68	2.25	0.12	1.29	0.13
CHICKASAW	10.36	1.64	0.10	0.83	0.12
CLARKE	25.15	3.06	0.18	1.69	0.22
CLAY	106.86	23.84	0.76	3.19	1.41
CLAYTON	33.22	4.59	0.25	2.23	0.67
CLINTON	119.34	17.71	1.01	7.59	1.60
CRAWFORD	21.40	3.49	0.19	1.67	0.20
DALLAS	190.26	31.38	1.85	11.99	1.72
DAVIS	6.99	0.70	0.04	0.47	0.08
DECATUR	12.69	1.08	0.06	0.75	0.12

Table E: Alphabetical by County, 2016

2016 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2016 (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	8.59	0.93	0.05	0.61	0.10
DES MOINES	136.40	25.11	1.09	7.12	2.01
DICKINSON	274.55	34.88	1.98	18.58	5.07
DUBUQUE	338.14	55.89	2.98	19.90	4.72
EMMET	11.10	1.49	0.07	0.81	0.14
FAYETTE	16.96	1.81	0.09	1.15	0.14
FLOYD	18.61	2.91	0.12	1.20	0.18
FRANKLIN	11.71	1.30	0.07	0.87	0.07
FREMONT	15.15	2.14	0.12	1.03	0.14
GREENE	6.38	0.72	0.03	0.47	0.08
GRUNDY	5.20	0.75	0.04	0.47	0.05
GUTHRIE	12.77	1.92	0.09	1.32	0.33
HAMILTON	23.88	3.15	0.18	1.60	0.20
HANCOCK	6.28	0.95	0.04	0.48	0.10
HARDIN	22.13	2.17	0.10	1.26	0.16
HARRISON	27.85	3.62	0.22	1.90	0.20
HENRY	22.07	3.37	0.18	1.42	0.32
HOWARD	4.66	0.57	0.03	0.35	0.05
HUMBOLDT	12.27	2.04	0.07	0.57	0.15
IDA	6.32	0.87	0.05	0.54	0.07
IOWA	42.81	6.94	0.42	3.11	0.68
JACKSON	31.72	4.43	0.24	2.36	0.68
JASPER	73.65	9.82	0.55	4.43	0.94
JEFFERSON	40.45	6.35	0.37	2.50	0.34
JOHNSON	399.55	64.44	3.83	24.28	6.54
JONES	21.36	2.16	0.11	1.61	0.15
KEOKUK	4.76	0.46	0.02	0.34	0.05

Table E: Alphabetical by County, 2016

2016 Domestic Travel Impact on Iowa						
Table E: Alphabetical by County, 2016 (Continued)						
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>	
KOSSUTH	17.17	1.88	0.11	1.23	0.12	
LEE	61.35	9.55	0.52	4.16	0.90	
LINN	787.91	140.71	6.48	43.05	12.32	
LOUISA	13.70	1.78	0.09	1.23	0.35	
LUCAS	7.72	0.91	0.05	0.52	0.09	
LYON	6.49	0.66	0.03	0.50	0.06	
MADISON	13.67	1.24	0.06	1.00	0.13	
MAHASKA	18.69	3.83	0.20	1.84	0.29	
MARION	51.34	6.69	0.37	3.38	0.43	
MARSHALL	89.61	13.80	0.73	5.68	1.20	
MILLS	8.13	0.99	0.06	0.78	0.08	
MITCHELL	10.66	1.14	0.06	0.69	0.10	
MONONA	19.36	3.23	0.17	1.28	0.25	
MONROE	8.40	1.54	0.09	0.79	0.11	
MONTGOMERY	21.11	3.84	0.22	1.93	0.23	
MUSCATINE	80.39	12.63	0.71	5.70	1.02	
O'BRIEN	22.28	2.89	0.16	1.58	0.17	
OSCEOLA	3.52	0.44	0.03	0.25	0.03	
PAGE	17.83	1.82	0.10	1.25	0.17	
PALO ALTO	34.41	5.06	0.26	2.65	0.68	
PLYMOUTH	24.71	2.95	0.15	1.84	0.19	
POCAHONTAS	4.42	0.51	0.03	0.32	0.05	
POLK	1,953.88	364.63	17.20	108.64	32.80	
POTTAWATTAMIE	302.28	56.37	3.20	22.00	4.77	
POWESHIEK	47.58	6.14	0.31	3.46	0.96	
RINGGOLD	10.29	1.00	0.04	0.80	0.21	
SAC	15.39	1.53	0.08	1.09	0.31	

Table E: Alphabetical by County, 2016

2016 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 2016 (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	638.24	105.33	6.40	42.69	10.28
SHELBY	14.51	1.70	0.09	1.02	0.14
SIOUX	36.67	4.85	0.25	2.58	0.28
STORY	206.56	30.91	1.70	12.08	2.79
TAMA	20.98	3.39	0.19	1.42	0.23
TAYLOR	3.29	0.32	0.02	0.30	0.03
UNION	15.15	2.15	0.12	1.24	0.17
VAN BUREN	6.62	0.90	0.05	0.55	0.08
WAPELLO	85.58	11.83	0.65	5.87	1.14
WARREN	37.48	3.59	0.20	2.48	0.32
WASHINGTON	16.02	1.90	0.11	1.15	0.12
WAYNE	7.11	0.89	0.05	0.67	0.11
WEBSTER	66.83	11.33	0.58	4.43	0.64
WINNEBAGO	11.39	1.05	0.06	0.84	0.09
WINNESHIEK	30.47	5.61	0.35	2.32	0.31
WOODBURY	299.58	53.66	2.40	15.31	4.48
WORTH	6.56	0.51	0.03	0.43	0.04
<u>WRIGHT</u>	<u>17.52</u>	<u>1.96</u>	<u>0.09</u>	<u>1.19</u>	<u>0.28</u>
STATE TOTALS	\$8,225.21	\$1,350.52	69.45	\$502.27	\$121.98

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APPENDICES

Appendix A: Travel Economic Impact Model

Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at U.S. Travel Association to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of a variety of travel categories (described in Appendix B: Glossary of Terms). The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

The TEIM has the capability of estimating the economic impact of various types of travel, such as business and vacation, by transport mode and type of accommodations used, and other trip and traveler characteristics. The County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

Definition of Terms

There is no commonly accepted definition of travel in use at this time. For the purposes of the estimates herein, *travel* is defined as activities associated with all overnight and day trips to places 50 miles away or more, one way, from the traveler's origin and any overnight trips away from home in paid accommodations.

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

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

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

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

Employment represents the number of jobs generated by traveler spending, both full and part-time. As such,

it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment. *Tax revenues* include corporate income, individual income, sales and gross receipts, and excise taxes by level of government. *Business receipts* reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

Description of the Model

Estimates of Travel Expenditures

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

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

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

Estimates of Business Receipts, Payroll and Employment

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 18 travel categories are associated with a type of travel related business. For example, traveler spending on commercial lodging in a state is related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701; NAICS 7211) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

It is assumed that each job in a specific type of business in a state is supported by some amount of business receipts and that each dollar of wages and salaries is similarly supported by some dollar volume of business receipts. The ratios of employment to business receipts are computed for each industry in each state. These ratios are then multiplied by the total amount of business receipts generated by traveler

spending in a particular type of business to obtain the measures of travel generated employment and payroll

of each type of business in each state. For example, the ratio of employees to business receipts in the state commercial lodging establishments is multiplied by travel generated business receipts of these establishments to obtain traveler generated employment in commercial lodging. A similar process is used for the payroll estimates. The total sales, payroll and employment data of each travel related industry (by SIC and NAICS) are provided by and collected from state, local and federal government, such as the Bureau of Labor Statistics, the Bureau of Economic Analysis, Census Bureau and The Bureau of Transportation Statistics.

Estimates of Tax Revenues

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

Estimates for Counties and Local Areas

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

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

Limitations of the Study

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

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

Appendix B: Glossary of Terms – TEIM

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

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

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

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

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

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

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

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

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

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

Appendix C: Travel Related Industry by NAICS

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

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

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

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

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

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

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

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

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