

The Economic Impact of Travel on Iowa Counties 2016

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.
November 2017

U.S.
TRAVEL
A S S O C I A T I O N

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Iowa Tourism Office

Travel Federation of Iowa

Iowa Destination Marketing Alliance

Iowa Group Travel Association

Central Iowa Tourism Region

Eastern Iowa Tourism Association

Western Iowa Tourism Region

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 2016 and 2015 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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TABLE OF CONTENTS

| | |
|---|-----------|
| INTRODUCTION | 1 |
| EXECUTIVE SUMMARY | 2 |
| NATIONAL SUMMARY 2016 | 3 |
| U.S. TRAVEL VOLUME IN 2016 | 4 |
| TRAVEL EXPENDITURES IN 2016 | 5 |
| TRAVEL EMPLOYMENT IN 2016..... | 7 |
| DOMESTIC TRAVEL IMPACT ON IOWA | 11 |
| TRAVEL EXPENDITURES | 12 |
| TRAVEL-GENERATED PAYROLL | 14 |
| TRAVEL-GENERATED EMPLOYMENT..... | 16 |
| TRAVEL-GENERATED TAX REVENUE | 18 |
| DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES..... | 20 |
| COUNTY TABLES | 22 |
| APPENDICES..... | 43 |
| APPENDIX A: TRAVEL ECONOMIC IMPACT MODEL | 44 |
| APPENDIX B: GLOSSARY OF TERMS – TEIM | 47 |
| APPENDIX C: TRAVEL RELATED INDUSTRY BY NAICS..... | 48 |
| APPENDIX D: SOURCES OF DATA | 49 |

LIST OF TABLES

| | |
|--|----|
| Table 1: Overall U.S. Economic Indicators, 2014-2016..... | 4 |
| Table 2: Travel Expenditures - U.S. Nationwide..... | 6 |
| Table 3: Travel Generated Employment - U.S. Nationwide | 8 |
| Table 4: U.S. Travel Forecasts..... | 9 |
| Table 5: Domestic Travel Expenditures in Iowa by Industry Sector, 2015-2016..... | 13 |
| Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2015-2016..... | 15 |
| Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2015-2016..... | 17 |
| Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2015-2016 | 19 |
| Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2015-2016 | 21 |
| Table A: Alphabetical by County, 2016 | 23 |
| Table B: Ranking of Counties by Expenditure Levels, 2016..... | 27 |
| Table C: Percent Distribution by County, 2016..... | 31 |
| Table D: Percent Change over 2015 | 35 |
| Table E: Alphabetical by County, 2015..... | 39 |

INTRODUCTION

This report presents preliminary 2016 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, 2015 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 2016 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 \$8.2 billion (in current dollars) in 2016, representing an increase of 2.0 percent from 2015.
- Total payroll income received by domestic travel-generated employees and workers in Iowa increased 5.7 percent from 2015 to nearly \$1.4 billion in 2016.
- Domestic traveler expenditures directly generated 69,500 jobs in Iowa during 2016, a 3.0 percent increase from 2015. Domestic travel-generated jobs in Iowa comprised 4.4 percent of total state non-farm employment in 2016.
- On average, every \$118,429 spent by domestic travelers in Iowa during 2016 supported one job. Likewise, every dollar spent by domestic travelers produced 16.4 cents in payroll income for Iowa residents in 2016.
- Domestic traveler spending in Iowa directly generated \$1,093.6 million in federal, state, and local tax revenue in 2016, up 6.5 percent from 2015. This high growth was partially due to increases in the state motor fuel tax rates.
- Polk County, which includes the city of Des Moines, generated nearly \$2.0 billion in domestic traveler expenditures to lead all Iowa counties in 2016.
- Fifteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2016. Fourteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

NATIONAL SUMMARY 2016

The U.S. economy continued to grow at a lower rate in 2016. Following a 2.9 percent and 2.6 percent increase in 2015 and 2014 respectively, the real GDP grew 1.5 percent in 2016. Economic activity in 2016, however, signaled a return of strong economic fundamentals.

The 2016 U.S. economy synchronized of business investment with growing consumer spending, adding much-needed stability after consecutive years of volatility in fixed nonresidential investment. Consumer spending remained strong throughout the year after a timid first quarter, increasing at 2.7 percent. Business investment faltered in the first quarter to start 2016, but regained its momentum to post consecutive quarters of at least 3.0 percent growth. Inventory investment also increased in the fourth quarter, contributing positively to GDP growth by over one percentage point for the first time since the first quarter of 2015.

At the same time, the U.S. economy was still facing large trade headwinds: exports on the whole had a volatile year but only increased at 0.4 percent whereas imports increased 5.0 percent. This could partly explain why business investment was lacking despite strong consumer spending numbers. Government spending also remained meager, increasing only 0.8 percent over the course of 2016.

The economy's strong fundamentals in the final quarter of 2016 were supported by a healthy and fully recovered labor market. Having recently surpassed its pre-2007-2009 recession peak of 138 million added jobs, the U.S. economy added 2.2 million jobs in 2016. Though it grew relatively slower than in 2014 and 2015, 2016 employment gains brought the economy closer to full employment, driving the unemployment rate to under five percent, and locking in recent gains for personal income and outlays.

Consequently, the Consumer Price Index (CPI), one measure of price levels, increased to 1.3 percent in 2016, up from a flat 2015. Excluding food and volatile energy prices (of which the latter has been at historic lows, driving down CPI), core CPI increased by 2.2 percent, the largest increase in core inflation since 2008. This increase in core inflation, as well as the healthy labor market, essentially drove the Federal Reserve to raise benchmark interest rates for the first time in nine years. Driven by historically low gasoline prices, U.S. Travel Association's Travel Price Index (TPI), on the other hand, remained flat for 2016, increasing by just 0.3 percent.

Moving forward to 2017, the U.S. economy endured a slow start in the first two quarters of 2017, expanding at 1.2 percent and 2.6 percent respectively over the first two quarters. Consumer spending was off to a slow start in 2017, increasing at 1.7 percent in the first quarter, while total investment and government spending both decreased 0.6 percent seasonally adjusted annualized rate (SAAR). The investment drop was due solely to a decrease in inventories, which slashed 1.5 percentage point from real GDP growth; business investment remained strong, growing 7.2 percent in the first quarter. The second quarter oversaw a modest rebound in consumer spending (2.8 percent SAAR growth) and investment (2.0 percent growth)

The U.S. employment situation continued to improve over the first seven months of 2017: average nonfarm employment increased by 1.5 percent, or (2.2 million jobs) compared to the first seven

months of 2016. During the same period, the travel industry directly added 9,500 jobs per month over the first seven months of 2017 (66,800 jobs). Unemployment continued to decline, reaching a 16-year low at 4.3 percent over 2016.

Consumer prices, on the other hand, increased 1.7 percent for the 12-month ending July 2017. Over the first seven months of 2017, prices increased on average 2.1 percent compared to the first seven months in 2016. The TPI also increased by a 2.2 percent average rate for the first seven months of 2017 compared to the first seven months of 2016.

Table 1: Overall U.S. Economic Indicators, 2014-2016

| <u>Sector</u> | <u>2014</u> | <u>2015</u> | <u>2016</u> |
|---|-------------|-------------|-------------|
| Nominal gross domestic product (\$ Billions) | 17,427.6 | 18,120.7 | 18,624.5 |
| Real gross domestic product (\$Billions) * | 16,013.3 | 16,471.5 | 16,716.2 |
| Real disposable personal income (\$Billions) * | 11,939.2 | 12,436.0 | 12,608.8 |
| Real personal consumption expenditures (\$Billions) * | 10,868.4 | 11,264.3 | 11,572.1 |
| Consumer price index** | 236.7 | 237.0 | 240.0 |
| Travel Price Index** | 279.6 | 272.4 | 273.1 |
| Nonfarm payroll employment (Millions) | 139.0 | 141.8 | 144.3 |
| Unemployment rate (%) | 6.2 | 5.3 | 4.9 |
| <i>Percentage change from previous year</i> | | | |
| Nominal gross domestic product | 4.4% | 4.0% | 2.8% |
| Real gross domestic product | 2.6% | 2.9% | 1.5% |
| Real disposable personal income | 3.6% | 4.2% | 1.4% |
| Real personal consumption expenditures | 2.9% | 3.6% | 2.7% |
| Consumer price index | 1.6% | 0.1% | 1.3% |
| Travel Price Index | 1.5% | -2.6% | 0.3% |
| Non-farm payroll employment | 1.9% | 2.1% | 1.7% |

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

* In chained 2009 dollars

** 1982-84=100

U.S. Travel Volume in 2016

U.S. domestic travel, including leisure and business travel, increased by 1.3 percent to a total of 2.2 billion person-trips in 2016. 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 1.7 percent in 2016 to 1.7 billion person-trips and is forecasted to increase 1.8 percent in 2017. Leisure travel accounted for 79.2 percent of

all U.S. domestic travel in 2016. Domestic business travel decreased by 0.2 percent in 2016 to 458.9 million person-trips and is expected to increase 1.6 percent in 2017.

International inbound travelers, including overnight visitors from Canada, Mexico and overseas, made 75.6 million visits to the United States in 2016. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 37.6 million in 2016 and accounted for nearly half of total international arrivals to the United States, according to U.S. Department of Commerce. Canadian overnight arrivals to the U.S. decreased from 20.7 million in 2015 to 17.3 million in 2016, while Mexican overnight arrivals increased from 18.4 million in 2015 to 18.7 million in 2016.

Travel Expenditures in 2016

Total domestic and international travelers spending in the U.S. increased 2.1 percent, growing from \$970 billion in 2015 to \$990 billion in 2016, not adjusted for inflation (excluding international airfare payments to the U.S. airlines). After a slight lull, the U.S. Travel Association expects total domestic and international traveler expenditures to pick up to 3.1 percent growth in 2017.

Domestic travel expenditures grew 2.9 percent from 2015 to \$837 billion in 2016. International travelers, on the other hand, spent \$154 billion in the U.S. in 2016, a decrease of 2.1 percent¹ from 2015. 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 0.9 percent in 2017.

International airfare receipts are total passenger fares paid by international residents on U.S. flag air carriers. In 2016, international airfare receipts totaled \$38.8 billion, down 7.6 percent from 2015. In the first six months of 2017, international airfare receipts increased 1.9 percent against the first six months of 2016.

Leisure traveler spending totaled \$683.1 billion in 2016, a 2.4 percent increase from 2015, accounting for 69.0 percent of all traveler expenditures. Business traveler spending increased 1.4 percent over 2015 to \$307.2 billion in 2016, 31.0 percent of all traveler expenditures.

¹ Reflects Department of Commerce data issued in June and does not include any revisions made in July.

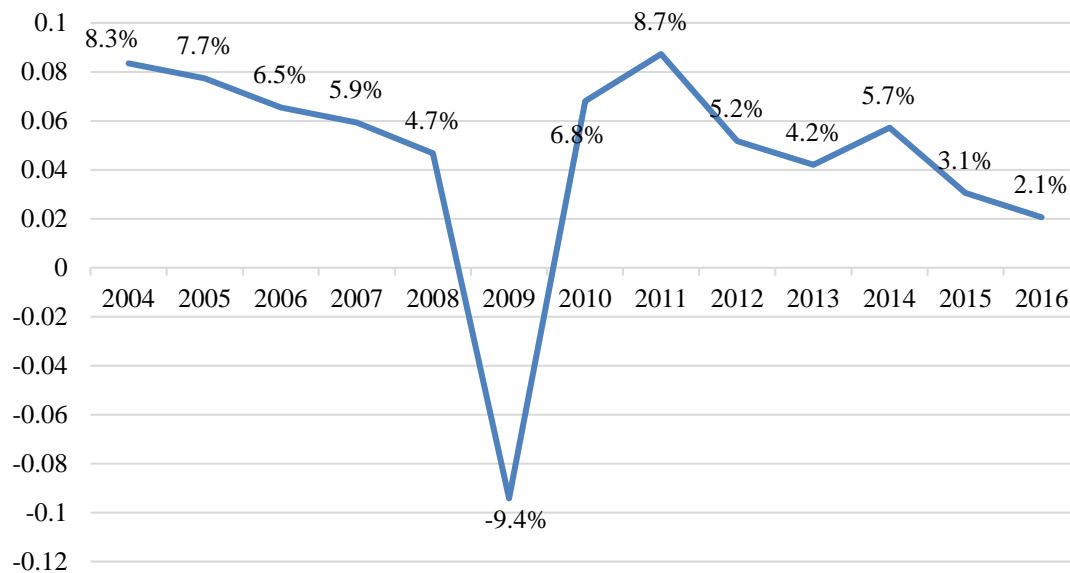
Table 2: Travel Expenditures - U.S. Nationwide

| Category | 2015 Spending (\$ Billions) | | | 2016 Spending (\$ Billions) | | |
|----------------------------|-----------------------------|----------------|----------------|-----------------------------|----------------|----------------|
| | Domestic | Intl.* | Total | Domestic | Intl.* | Total |
| Public Transportation | \$928.5 | \$75.7 | \$1,004.2 | \$966.6 | \$76.7 | \$1,043.3 |
| Auto Transportation | 282.8 | 2.4 | 285.1 | 294.5 | 2.4 | 296.8 |
| Lodging | 1,282.4 | 285.2 | 1,567.6 | 1,309.3 | 271.5 | 1,580.8 |
| Foodservice | 2,921.1 | 466.1 | 3,387.2 | 3,048.9 | 444.9 | 3,493.7 |
| Entertainment & Recreation | 1,181.9 | 263.1 | 1,445.0 | 1,216.7 | 242.1 | 1,458.8 |
| General Retail Trade | 354.7 | 179.2 | 533.9 | 371.6 | 170.2 | 541.9 |
| Travel Planning | 172.7 | | 172.7 | 182.2 | | 182.2 |
| Total | 7,124.1 | 1,271.8 | 8,395.9 | 7,389.7 | 1,207.8 | 8,597.5 |

Source: U.S. Travel Association

* Excludes international passenger fare payments.

**Changes of Direct Travel Expenditures*
in the U.S., 2004-2016**



Source: U.S. Travel Association.

*Excludes international passenger fare payments.

Travel Employment in 2016

The year 2016 marked a turning point for the U.S. labor economy, wherein it transitioned from “recovered” to “healthy.” After making a full recovery from the 2007-2009 recession in February 2015, the economy built on its past gains, reaching a new high of 144.3 million nonfarm jobs, as measured by the Labor Department. In addition to creating 2.5 million jobs, a 1.7 percent increase from 2015, the annual average unemployment rate reached a post-recession low of 4.9 percent.

After peaking at 9.6 percent in 2010, the unemployment rate fell to an average monthly rate of 5.3 percent in 2016, starting at 5.7 percent in January and ending at 5.0 percent in December. The unemployment rate fell to 4.9 percent in January and February 2017, but returned to 5.0 percent in April, still above the 4.4 percent pre-recession low.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery, accounting for 85.8 percent of the jobs recovered from 2010 to 2016. 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 2016. Travel accounted for 8.8 percent of nonfarm jobs created from 2010 to 2016, despite holding a 6 percent share of all nonfarm jobs in 2016.

In 2016, traveler spending directly supported nearly 8.6 million U.S. jobs, including both full-time and seasonal/part-time positions, up 2.4 percent from 2015. This increase translated into over 200,000 jobs added to the U.S. economy, accounting for 8.2 percent of total non-farm job growth since 2015.

These 8.6 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2016 national unemployment rate of 4.9 percent would more than double to 10.1 percent of the civilian labor force.

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

| Category | 2015 Employment (Thousands) | | | 2016 Employment (Thousands) | | |
|----------------------------|-----------------------------|----------------|----------------|-----------------------------|----------------|----------------|
| | Domestic | Intl.* | Total | Domestic | Intl.* | Total |
| Public Transportation | \$928.5 | \$75.7 | \$1,004.2 | \$966.6 | \$76.7 | \$1,043.3 |
| Auto Transportation | 282.8 | 2.4 | 285.1 | 294.5 | 2.4 | 296.8 |
| Lodging | 1,282.4 | 285.2 | 1,567.6 | 1,309.3 | 271.5 | 1,580.8 |
| Foodservice | 2,921.1 | 466.1 | 3,387.2 | 3,048.9 | 444.9 | 3,493.7 |
| Entertainment & Recreation | 1,181.9 | 263.1 | 1,445.0 | 1,216.7 | 242.1 | 1,458.8 |
| General Retail Trade | 354.7 | 179.2 | 533.9 | 371.6 | 170.2 | 541.9 |
| Travel Planning | 172.7 | | 172.7 | 182.2 | | 182.2 |
| Total | 7,124.1 | 1,271.8 | 8,395.9 | 7,389.7 | 1,207.8 | 8,597.5 |

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

Table 4: U.S. Travel Forecasts

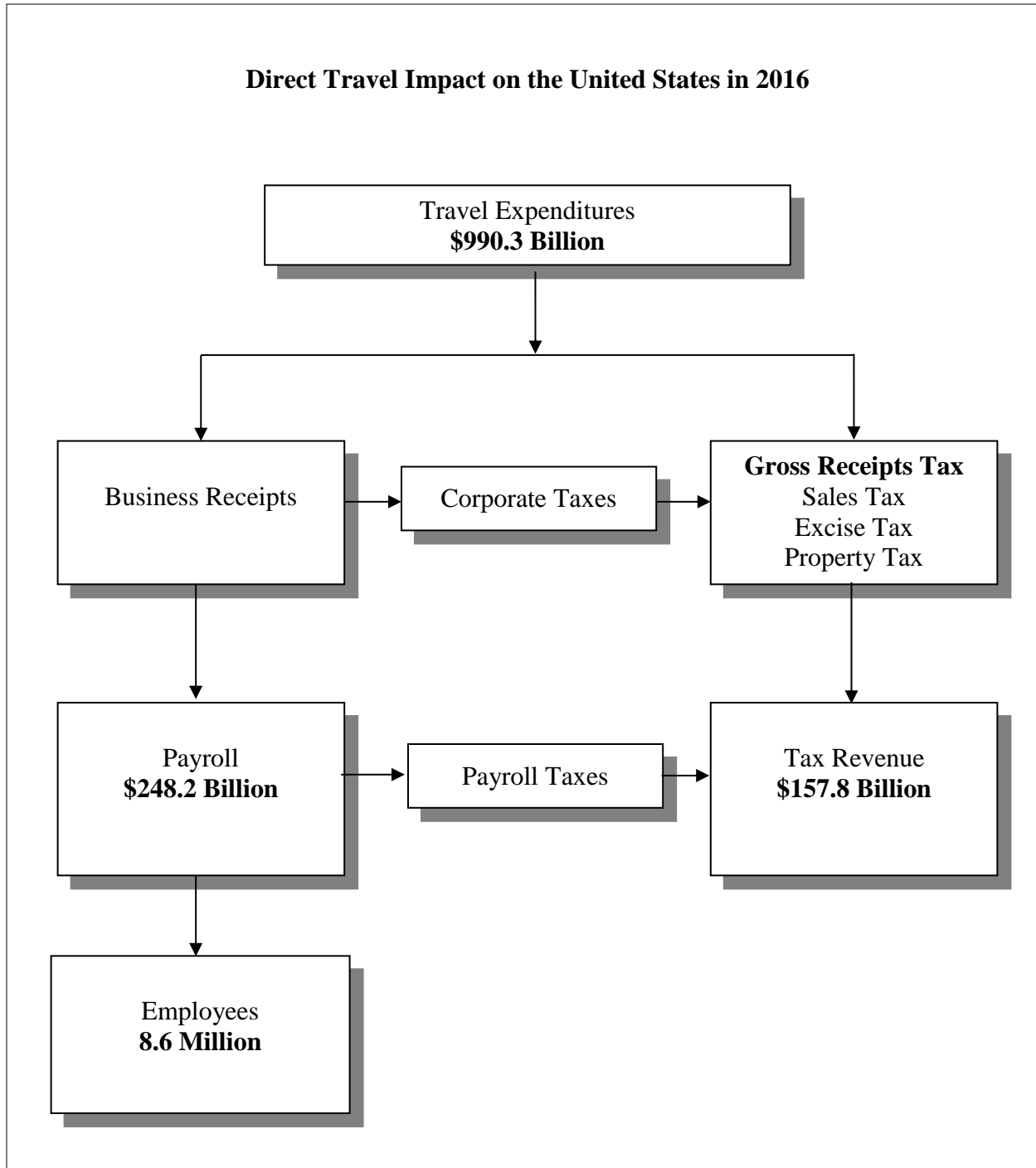
| | <u>2010</u> | <u>2011</u> | <u>2012</u> | <u>2013</u> | <u>2014</u> | <u>2015</u> | <u>2016</u> | <u>2017</u> | <u>2018</u> | <u>2019</u> |
|---|-------------|-------------|-------------|-------------|-----------------|-----------------|-------------|-------------|-------------|-------------|
| Real GDP (\$Billions) * | 14,783.80 | 15,020.60 | 15,354.60 | 15,612.20 | 15,982.30 | 16,397.20 | 18,500.80 | 19,331.90 | 20,253.20 | 21,110.0 |
| Unemployment Rate (%) | 9.6 | 8.9 | 8.1 | 7.4 | 7.4 | 5.3 | 4.9 | 4.6 | 4.7 | 4.6 |
| Consumer Price Index (CPI) ** | 214.6 | 218.1 | 224.9 | 229.6 | 233.0 | 236.7 | 237.1 | 240.0 | 245.5 | 250.7 |
| Travel Price Index (TPI) ** | 241.5 | 250.7 | 266.9 | 273.0 | 275.6 | 279.6 | 272.4 | 273.1 | 282.0 | 292.0 |
| Total Travel Expenditures in U.S. (\$ Billions) | 750.8 | 815.3 | 854.7 | 890.7 | 941.6 | 970.4 | 990.3 | 1,020.9 | 1,062.9 | 1,106.4 |
| U.S. Residents | 643.9 | 696.7 | 728.0 | 751.2 | 792.4 | 813.4 | 836.6 | 865.9 | 901.3 | 937.0 |
| International Visitors *** | 106.9 | 118.6 | 126.7 | 139.5 | 149.2 | 157.0 | 153.7 | 155.1 | 161.6 | 169.4 |
| Total International Visitors to the U.S. (Millions) | 60.0 | 62.8 | 66.7 | 70.0 | 75.0 | 77.5 | 75.6 | 75.5 | 76.9 | 80.0 |
| Overseas Arrivals to the U.S. (Millions) | 26.4 | 27.9 | 29.8 | 32.0 | 34.9 | 38.4 | 37.6 | 37.7 | 38.7 | 40.4 |
| Total Domestic Person-Trips (Millions) | 1,963.7 | 1,997.5 | 2,030.3 | 2,059.6 | 2,109.3 | 2,178.7 | 2,206.5 | 2,245.9 | 2,286.3 | 2,322.4 |
| Business | 434.3 | 446.6 | 440.7 | 439.4 | 445.7 | 450.8 | 459.8 | 458.9 | 466.2 | 471.2 |
| Leisure | 1,465.9 | 1,517.1 | 1,556.8 | 1,590.9 | 1,614.0 | 1,658.4 | 1,718.9 | 1,747.5 | 1,779.7 | 1,815.1 |
| Percent Change from Previous Year (%) | | | | | | | | | | |
| Real GDP | 2.5 | 1.6 | 2.2 | 1.7 | 2.4 | 2.6 | 2.0 | 2.4 | 2.3 | 1.7 |
| Consumer Price Index (CPI) | 1.6 | 3.1 | 2.1 | 1.5 | 1.6 | 0.1 | 1.2 | 2.3 | 2.1 | 2.0 |
| Travel Price Index (TPI) | 3.8 | 6.5 | 2.3 | 0.9 | 1.5 | -2.6 | 0.3 | 3.3 | 3.5 | 2.9 |
| Total Travel Expenditures in U.S. | 7.8 | 8.6 | 4.8 | 4.2 | 5.7 | 3.1 | 2.1 | 3.1 | 4.1 | 4.1 |
| U.S. Residents | 6.3 | 8.2 | 4.5 | 3.2 | 5.5 | 2.7 | 2.9 | 3.5 | 4.1 | 4.0 |
| International Visitors | 17.8 | 11.0 | 6.8 | 10.0 | 7.0 | 5.2 | -2.1 | 0.9 | 4.2 | 4.8 |
| Total International Visitors to the U.S. | 8.9 | 4.7 | 6.1 | 5.0 | NA ^a | NA ^b | -2.4 | -0.1 | 1.9 | 4.0 |
| Overseas Arrivals to the U.S. | 11.0 | 5.8 | 6.7 | 7.7 | NA ^a | NA ^b | -2.1 | 0.2 | 2.9 | 4.2 |
| Total Domestic Person-Trips | 3.3 | 1.7 | 1.6 | 1.4 | 2.4 | 3.3 | 1.3 | 1.8 | 1.8 | 1.6 |
| Business | 2.8 | -1.3 | -0.3 | 1.4 | 1.2 | 2.0 | -0.2 | 1.6 | 1.1 | 0.8 |
| Leisure | 3.5 | 2.6 | 2.2 | 1.5 | 2.8 | 3.6 | 1.7 | 1.8 | 2.0 | 1.8 |

Sources: U.S. Travel Association

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

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

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



Source: U.S. Travel Association, BEA

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

DOMESTIC TRAVEL IMPACT ON IOWA

TRAVEL EXPENDITURES

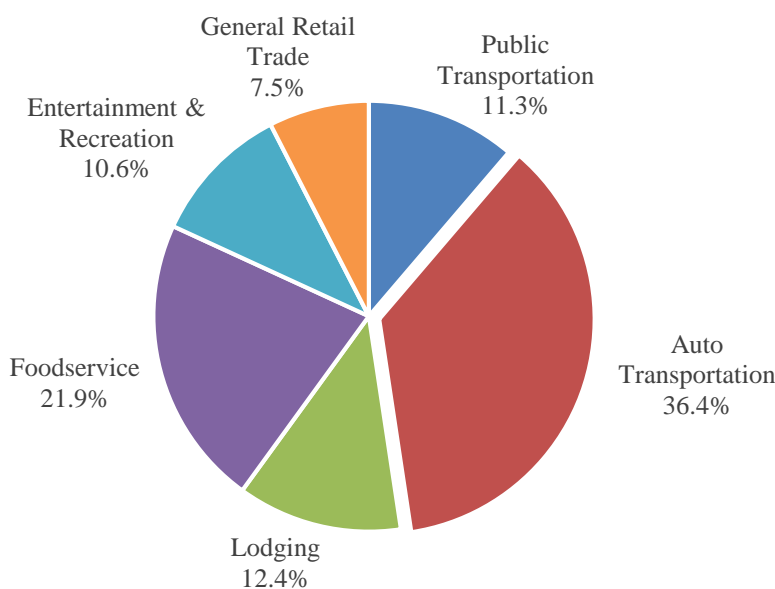
Domestic traveler spending in Iowa totaled over \$8.2 billion (in current dollars) during 2016, representing an increase of 2.0 percent from 2015.

Auto transportation, foodservices and lodging are the top three spending categories for domestic travelers in Iowa. Domestic travelers spent almost \$3.0 billion on auto transportation, down 1.7 percent from 2015. The decrease is largely caused by gasoline price decreases. This sector accounted for 36.4 percent of total domestic travelers' spending in Iowa.

Accounting for 21.9 percent of the state total domestic traveler expenditures, spending on foodservice rose 4.3 percent to nearly \$1.8 billion in 2016. Domestic travelers' spending on lodging grew 4.5 percent to \$1.0 billion in 2016.

In 2016, domestic travelers' spending on public transportation was up 3.4 percent from 2015 to \$925.4 million. Domestic travelers spent \$871.7 million on the entertainment and recreation sector in 2016, up 4.5 percent from 2015. Domestic travelers' spending on general retail increased 4.6 percent to \$620.5 million in 2016.

**Domestic Travel Expenditures in Iowa in 2016
by Industry Sector**



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

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

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

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

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

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

Table 5: Domestic Travel Expenditures in Iowa by Industry Sector, 2015-2016

| <i>2016 Travel Expenditures</i> | Total (\$ Millions) | % of Total (Percent) |
|--|--------------------------------------|---------------------------------------|
| 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>2015 Travel Expenditures</i> | | |
| Public Transportation | \$895.4 | 11.1% |
| Auto Transportation | 3,043.0 | 37.7% |
| Lodging | 974.7 | 12.1% |
| Foodservice | 1,724.0 | 21.4% |
| Entertainment & Recreation | 834.0 | 10.3% |
| General Retail Trade | 593.1 | 7.4% |
| Total | \$8,064.1 | 100.0% |
| | | |
| <i>Percent Change</i> <i>2016 over 2015</i> | | |
| Public Transportation | 3.4% | |
| Auto Transportation | -1.7% | |
| Lodging | 4.5% | |
| Foodservice | 4.3% | |
| Entertainment & Recreation | 4.5% | |
| General Retail Trade | 4.6% | |
| Total | 2.0% | |

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

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

In 2016, total payroll income received by domestic travel-generated employees and workers in Iowa increased 5.7 percent from 2015 to nearly \$1.4 billion. On the average, every dollar spent by domestic travelers produced 16.4 cents in payroll income in Iowa during 2016.

The foodservice sector, which posted the highest share of payroll (28.0%) among the seven industry sectors investigated in this report, was up by 5.4 percent from 2015 to \$378.7 million.

Entertainment and recreation, the second largest sector (18.0%) in the Iowa travel industry by domestic travel-generated payroll, increased 5.6 percent from 2015 to \$243.5 million. The public transportation sector followed entertainment and recreation sector very closely, reaching \$240.3 million in 2016.

**Domestic Travel-Generated Payroll in Iowa in 2016
by Industry Sector**

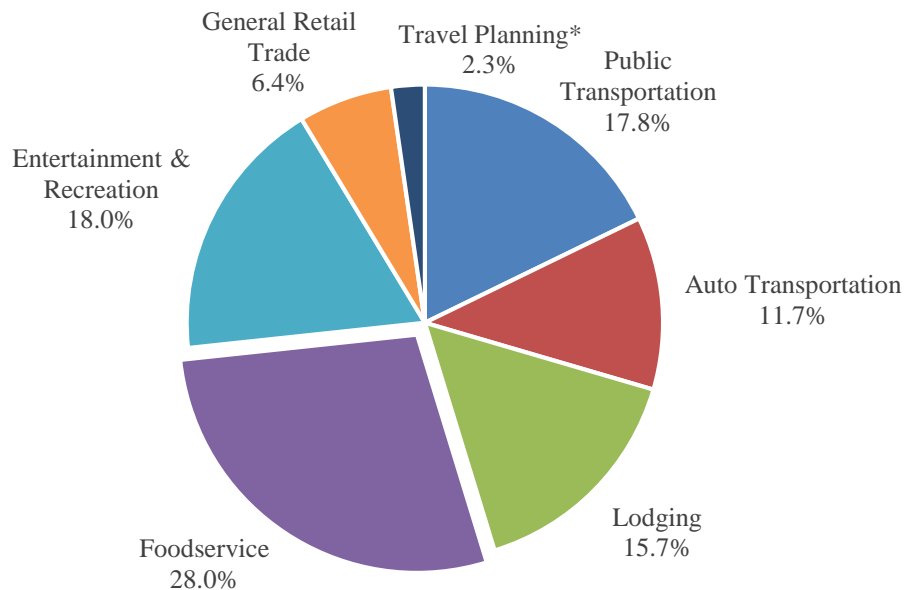


Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2015-2016

| <i>2016 Payroll</i> | <u>Total</u> <u>(\$ Millions)</u> | <u>% of Total</u> <u>(Percent)</u> |
|------------------------------|--|---|
| Public Transportation | \$240.3 | 17.8% |
| Auto Transportation | 158.5 | 11.7% |
| Lodging | 212.6 | 15.7% |
| Foodservice | 378.7 | 28.0% |
| Entertainment & Recreation | 243.5 | 18.0% |
| General Retail Trade | 86.2 | 6.4% |
| Travel Planning* | 30.8 | 2.3% |
| Total | \$1,350.5 | 100.0% |
| <i>2015 Payroll</i> | | |
| Public Transportation | \$221.2 | 17.3% |
| Auto Transportation | 151.3 | 11.5% |
| Lodging | 203.2 | 13.7% |
| Foodservice | 359.3 | 26.5% |
| Entertainment & Recreation | 230.6 | 20.8% |
| General Retail Trade | 82.9 | 6.5% |
| Travel Planning* | 29.6 | 2.6% |
| Total | \$1,278.0 | 100.0% |
| | | |
| <i>Percent Change</i> | | |
| <i>2016 over 2015</i> | | |
| Public Transportation | 8.6% | |
| Auto Transportation | 4.8% | |
| Lodging | 4.6% | |
| Foodservice | 5.4% | |
| Entertainment & Recreation | 5.6% | |
| General Retail Trade | 3.9% | |
| Travel Planning* | 4.2% | |
| Total | 5.7% | |

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. Including full-time and seasonal/part-time positions, the state's domestic travel-generated jobs in 2016 increased 3.0 percent from 2015 to 69,500.

On the average, every \$118,429 spent by domestic travelers in Iowa directly supported one job in 2016.

The 69,500 jobs supported by domestic travel in Iowa comprised 4.4 percent of state's total non-agricultural employment during 2016. Without these jobs generated by domestic travel, Iowa's 2016 unemployment rate of 3.7 percent would have been 4.1 percentage points higher, or 7.8 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 2016, 26,000 jobs in this sector were supported directly by domestic travel in Iowa, accounting for 37.4 percent of total domestic travel-generated jobs in the state. Employment in this sector increased 0.9 percent from 2015.

Domestic travel directly supported 13,800 jobs in the entertainment and recreation sector in 2016, the second largest component of the state total. The lodging sector supported 12,300 jobs in 2016.

**Domestic Travel-Generated Employment in Iowa in 2016
by Industry Sector**

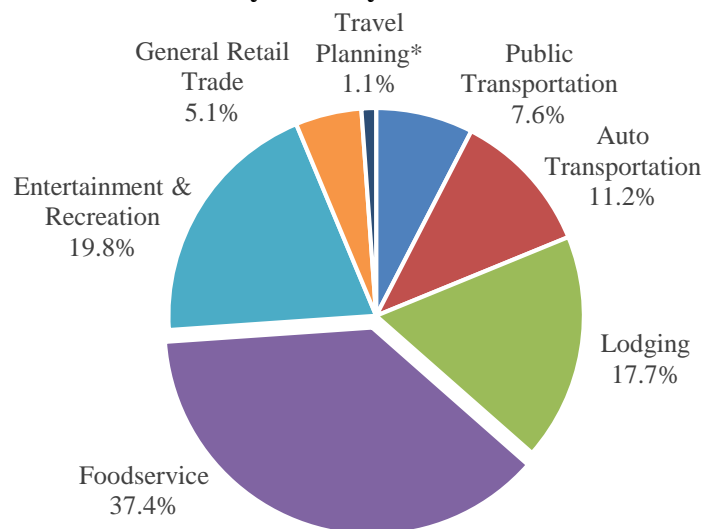


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2015-2016

| <i>2016 Employment</i> | Total (Thousand) | % of Total (Percent) |
|---|-----------------------------|---------------------------------|
| 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% |
| <i>2015 Employment</i> | | |
| Public Transportation | 5.1 | 7.5% |
| Auto Transportation | 7.6 | 11.3% |
| Lodging | 12.1 | 17.9% |
| Foodservice | 25.8 | 38.2% |
| Entertainment & Recreation | 12.5 | 18.6% |
| General Retail Trade | 3.5 | 5.3% |
| Travel Planning* | 0.8 | 1.2% |
| Total | 67.4 | 100.0% |
| | | |
| <i>Percent Change 2016 over 2015</i> | | |
| Public Transportation | 4.0% | |
| Auto Transportation | 2.1% | |
| Lodging | 1.6% | |
| Foodservice | 0.9% | |
| Entertainment & Recreation | 9.7% | |
| General Retail Trade | 0.8% | |
| Travel Planning* | 1.5% | |
| Total | 3.0% | |

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 2016, total tax revenues directly generated by domestic travelers' spending in Iowa grew 6.5 percent from 2015 to a total of \$1,093.6 million. The federal government collected a total of \$469.4 million from domestic traveler spending, an increase of 5.9 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 5.7 cents for federal tax coffers.

The tax revenue generated by domestic travelers' spending for Iowa's state treasury rose 7.6 percent to a total of \$502.3 million, accounting for 45.9 percent of all domestic travel-generated tax revenue for 2016. This high growth was largely caused by increases on state motor fuel tax rates. On average, each domestic travel dollar produced 6.1 cents in tax revenue for Iowa's state government.

The tax revenue collected by the local governments (counties and cities) was 4.4 percent higher than in 2015, for a total of \$122.0 million. Each domestic travel dollar produced 1.5 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in Iowa in 2016
by Level of Government**

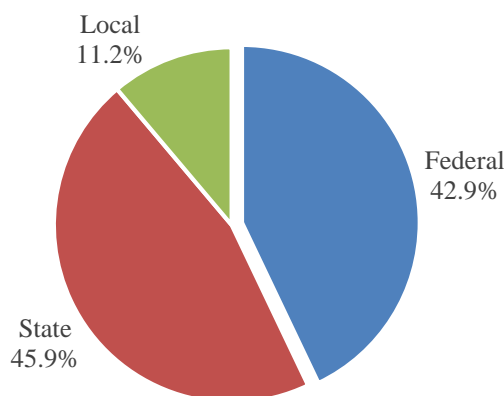


Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2015-2016

| <i>2016 Tax Revenue</i> | Total (\$ Millions) | % of Total (Percent) |
|--------------------------------|-------------------------------|--------------------------------|
| Federal | \$469.4 | 42.9% |
| State | 502.3 | 45.9% |
| Local | 122.0 | 11.2% |
| Total | \$1,093.6 | 100.0% |
| <i>2015 Tax Revenue</i> | | |
| Federal | \$443.1 | 43.2% |
| State | 466.7 | 45.5% |
| Local | 116.9 | 11.4% |
| Total | \$1,026.7 | 100.0% |
| <i>Percent Change</i> | | |
| <i>2016 over 2015</i> | | |
| Federal | 5.9% | |
| State | 7.6% | |
| Local | 4.4% | |
| Total | 6.5% | |

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2016, domestic travel expenditures in Iowa totaled close to \$8.2 billion (in current dollars), representing an increase of 2.0 percent from 2015. This spending directly generated 69,500 jobs and nearly \$1.4 billion in payroll income. Additionally, a total of \$624.3 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 just over \$4.1 billion in direct domestic travel expenditures, accounting for 50.3 percent of the state total. Domestic travel spending in the top five counties generated \$735.1 million in payroll (54.4 percent of the state total) and 36,900 jobs (53.1 percent of the state total) in 2016.

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 2016. Domestic traveler expenditures in Polk County reached nearly \$2.0 billion, accounting for 23.8 percent of the state total. These expenditures generated \$364.4 million in payroll income and 17,200 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$787.9 million in domestic travel spending in 2016, representing 9.6 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$140.7 million and 6,500 jobs.

Scott County posted \$638.2 million in domestic expenditures to rank third. These expenditures generated \$105.3 million in payroll as well as 6,400 jobs within the county.

Johnson County ranked fourth with \$399.6 million in domestic travel expenditures. These travel expenditures benefited county residents with \$64.4 million in payroll income and 3,800 jobs.

Black Hawk County ranked fifth by domestic travel spending in 2016. Domestic travelers spent \$360.0 million in the county, generating \$59.9 million in payroll income and 3,000 jobs.

Table 9: Domestic Travel Impact in Iowa - Top 5 Counties, 2015-2016***2016 Travel Impact***

| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
|-------------------|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| POLK | \$1,953.9 | \$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 TOTAL | \$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 SHARE | 50.3% | 54.4% | 53.1% | 47.4% | 54.9% |

2015 Travel Impact

| | | | | | |
|-------------------|-----------|-----------|-------|---------|---------|
| POLK | \$1,898.1 | \$342.3 | 16.6 | \$99.9 | \$31.2 |
| LINN | 771.9 | 133.2 | 6.3 | 39.9 | 11.8 |
| SCOTT | 624.1 | 99.5 | 6.2 | 39.5 | 9.8 |
| JOHNSON | 388.6 | 60.6 | 3.7 | 22.4 | 6.2 |
| BLACK HAWK | 351.7 | 56.6 | 2.9 | 18.2 | 4.8 |
| FIVE COUNTY TOTAL | \$4,034.4 | \$692.2 | 35.6 | \$219.9 | \$63.8 |
| STATE TOTALS | \$8,064.1 | \$1,278.0 | 67.4 | \$466.7 | \$116.9 |
| FIVE COUNTY SHARE | 50.0% | 54.2% | 52.8% | 47.1% | 54.6% |

Percent Change - 2016 over 2015

| | | | | | |
|-------------------|------|------|------|------|------|
| POLK | 2.9% | 6.5% | 3.9% | 8.7% | 5.3% |
| LINN | 2.1% | 5.6% | 3.0% | 7.8% | 4.4% |
| SCOTT | 2.3% | 5.8% | 3.3% | 8.0% | 4.6% |
| JOHNSON | 2.8% | 6.4% | 3.8% | 8.6% | 5.1% |
| BLACK HAWK | 2.4% | 5.9% | 3.4% | 8.2% | 4.7% |
| FIVE COUNTY TOTAL | 2.6% | 6.2% | 3.6% | 8.4% | 4.9% |
| STATE TOTALS | 2.0% | 5.7% | 3.0% | 7.6% | 4.4% |

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 2015 and 2016 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2016 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 2016 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2016.

Table D shows the percent change in 2016 over 2015 estimates for each of the measures of economic impact.

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

Table A: Alphabetical by County, 2016

| 2016 Domestic Travel Impact on Iowa | | | | | |
|--|---|--|---|--|--|
| Table A: Alphabetical by County, 2016 | | | | | |
| <u>County</u> | <u>Expenditures</u> <u>(\$ Millions)</u> | <u>Payroll</u> <u>(\$ Millions)</u> | <u>Employment</u> <u>(Thousands)</u> | <u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u> | <u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u> |
| ADAIR | \$16.30 | \$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 A: Alphabetical by County, 2016

| 2016 Domestic Travel Impact on Iowa | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table A: 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 A: Alphabetical by County, 2016

2016 Domestic Travel Impact on Iowa
Table A: 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 A: Alphabetical by County, 2016

| 2016 Domestic Travel Impact on Iowa | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table A: 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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Table B: Ranking of Counties by Expenditure Levels, 2016

| 2016 Domestic Travel Impact on Iowa Table B: Ranking of Counties by Expenditure Levels, 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> |
| POLK | \$1,953.88 | \$364.63 | 17.20 | \$108.64 | \$32.80 |
| LINN | 787.91 | 140.71 | 6.48 | 43.05 | 12.32 |
| SCOTT | 638.24 | 105.33 | 6.40 | 42.69 | 10.28 |
| JOHNSON | 399.55 | 64.44 | 3.83 | 24.28 | 6.54 |
| BLACK HAWK | 360.05 | 59.94 | 2.97 | 19.64 | 5.03 |
| DUBUQUE | 338.14 | 55.89 | 2.98 | 19.90 | 4.72 |
| POTTAWATTAMIE | 302.28 | 56.37 | 3.20 | 22.00 | 4.77 |
| WOODBURY | 299.58 | 53.66 | 2.40 | 15.31 | 4.48 |
| DICKINSON | 274.55 | 34.88 | 1.98 | 18.58 | 5.07 |
| STORY | 206.56 | 30.91 | 1.70 | 12.08 | 2.79 |
| CERRO GORDO | 196.13 | 27.72 | 1.56 | 11.83 | 3.46 |
| DALLAS | 190.26 | 31.38 | 1.85 | 11.99 | 1.72 |
| DES MOINES | 136.40 | 25.11 | 1.09 | 7.12 | 2.01 |
| CLINTON | 119.34 | 17.71 | 1.01 | 7.59 | 1.60 |
| CLAY | 106.86 | 23.84 | 0.76 | 3.19 | 1.41 |
| MARSHALL | 89.61 | 13.80 | 0.73 | 5.68 | 1.20 |
| WAPELLO | 85.58 | 11.83 | 0.65 | 5.87 | 1.14 |
| MUSCATINE | 80.39 | 12.63 | 0.71 | 5.70 | 1.02 |
| JASPER | 73.65 | 9.82 | 0.55 | 4.43 | 0.94 |
| WEBSTER | 66.83 | 11.33 | 0.58 | 4.43 | 0.64 |
| LEE | 61.35 | 9.55 | 0.52 | 4.16 | 0.90 |
| CARROLL | 57.49 | 7.68 | 0.45 | 3.72 | 0.44 |
| BREMER | 54.18 | 7.15 | 0.45 | 3.39 | 0.40 |
| MARION | 51.34 | 6.69 | 0.37 | 3.38 | 0.43 |
| POWESHIEK | 47.58 | 6.14 | 0.31 | 3.46 | 0.96 |
| IOWA | 42.81 | 6.94 | 0.42 | 3.11 | 0.68 |
| JEFFERSON | 40.45 | 6.35 | 0.37 | 2.50 | 0.34 |

Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Domestic Travel Impact on Iowa**Table B: Ranking of Counties by Expenditure Levels, 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> |
|---------------|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| ALLAMAKEE | 40.21 | 4.05 | 0.20 | 2.55 | 1.01 |
| WARREN | 37.48 | 3.59 | 0.20 | 2.48 | 0.32 |
| SIOUX | 36.67 | 4.85 | 0.25 | 2.58 | 0.28 |
| PALO ALTO | 34.41 | 5.06 | 0.26 | 2.65 | 0.68 |
| CLAYTON | 33.22 | 4.59 | 0.25 | 2.23 | 0.67 |
| JACKSON | 31.72 | 4.43 | 0.24 | 2.36 | 0.68 |
| WINNESHIEK | 30.47 | 5.61 | 0.35 | 2.32 | 0.31 |
| BUENA VISTA | 28.83 | 3.80 | 0.20 | 1.85 | 0.27 |
| HARRISON | 27.85 | 3.62 | 0.22 | 1.90 | 0.20 |
| BUCHANAN | 26.51 | 2.66 | 0.13 | 1.90 | 0.30 |
| CASS | 26.34 | 2.95 | 0.16 | 1.80 | 0.19 |
| BOONE | 26.10 | 3.14 | 0.17 | 1.98 | 0.22 |
| CLARKE | 25.15 | 3.06 | 0.18 | 1.69 | 0.22 |
| PLYMOUTH | 24.71 | 2.95 | 0.15 | 1.84 | 0.19 |
| HAMILTON | 23.88 | 3.15 | 0.18 | 1.60 | 0.20 |
| O'BRIEN | 22.28 | 2.89 | 0.16 | 1.58 | 0.17 |
| HARDIN | 22.13 | 2.17 | 0.10 | 1.26 | 0.16 |
| HENRY | 22.07 | 3.37 | 0.18 | 1.42 | 0.32 |
| CEDAR | 21.71 | 2.54 | 0.13 | 1.73 | 0.29 |
| CRAWFORD | 21.40 | 3.49 | 0.19 | 1.67 | 0.20 |
| JONES | 21.36 | 2.16 | 0.11 | 1.61 | 0.15 |
| MONTGOMERY | 21.11 | 3.84 | 0.22 | 1.93 | 0.23 |
| TAMA | 20.98 | 3.39 | 0.19 | 1.42 | 0.23 |
| MONONA | 19.36 | 3.23 | 0.17 | 1.28 | 0.25 |
| MAHASKA | 18.69 | 3.83 | 0.20 | 1.84 | 0.29 |
| FLOYD | 18.61 | 2.91 | 0.12 | 1.20 | 0.18 |
| BENTON | 18.26 | 1.77 | 0.10 | 1.49 | 0.12 |

Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Domestic Travel Impact on Iowa**Table B: Ranking of Counties by Expenditure Levels, 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> |
|---------------|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| PAGE | 17.83 | 1.82 | 0.10 | 1.25 | 0.17 |
| WRIGHT | 17.52 | 1.96 | 0.09 | 1.19 | 0.28 |
| APPANOOSE | 17.41 | 2.16 | 0.12 | 1.21 | 0.24 |
| KOSSUTH | 17.17 | 1.88 | 0.11 | 1.23 | 0.12 |
| FAYETTE | 16.96 | 1.81 | 0.09 | 1.15 | 0.14 |
| ADAIR | 16.30 | 1.59 | 0.09 | 0.82 | 0.11 |
| WASHINGTON | 16.02 | 1.90 | 0.11 | 1.15 | 0.12 |
| SAC | 15.39 | 1.53 | 0.08 | 1.09 | 0.31 |
| FREMONT | 15.15 | 2.14 | 0.12 | 1.03 | 0.14 |
| UNION | 15.15 | 2.15 | 0.12 | 1.24 | 0.17 |
| CHEROKEE | 14.68 | 2.25 | 0.12 | 1.29 | 0.13 |
| SHELBY | 14.51 | 1.70 | 0.09 | 1.02 | 0.14 |
| LOUISA | 13.70 | 1.78 | 0.09 | 1.23 | 0.35 |
| MADISON | 13.67 | 1.24 | 0.06 | 1.00 | 0.13 |
| GUTHRIE | 12.77 | 1.92 | 0.09 | 1.32 | 0.33 |
| DECATUR | 12.69 | 1.08 | 0.06 | 0.75 | 0.12 |
| HUMBOLDT | 12.27 | 2.04 | 0.07 | 0.57 | 0.15 |
| FRANKLIN | 11.71 | 1.30 | 0.07 | 0.87 | 0.07 |
| WINNEBAGO | 11.39 | 1.05 | 0.06 | 0.84 | 0.09 |
| EMMET | 11.10 | 1.49 | 0.07 | 0.81 | 0.14 |
| MITCHELL | 10.66 | 1.14 | 0.06 | 0.69 | 0.10 |
| CHICKASAW | 10.36 | 1.64 | 0.10 | 0.83 | 0.12 |
| CALHOUN | 10.34 | 1.25 | 0.06 | 0.83 | 0.27 |
| RINGGOLD | 10.29 | 1.00 | 0.04 | 0.80 | 0.21 |
| DELAWARE | 8.59 | 0.93 | 0.05 | 0.61 | 0.10 |
| BUTLER | 8.53 | 0.70 | 0.03 | 0.68 | 0.05 |
| MONROE | 8.40 | 1.54 | 0.09 | 0.79 | 0.11 |

Table B: Ranking of Counties by Expenditure Levels, 2016

| 2016 Domestic Travel Impact on Iowa | | | | | |
|---|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table B: Ranking of Counties by Expenditure Levels, 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> |
| MILLS | 8.13 | 0.99 | 0.06 | 0.78 | 0.08 |
| LUCAS | 7.72 | 0.91 | 0.05 | 0.52 | 0.09 |
| WAYNE | 7.11 | 0.89 | 0.05 | 0.67 | 0.11 |
| DAVIS | 6.99 | 0.70 | 0.04 | 0.47 | 0.08 |
| VAN BUREN | 6.62 | 0.90 | 0.05 | 0.55 | 0.08 |
| WORTH | 6.56 | 0.51 | 0.03 | 0.43 | 0.04 |
| LYON | 6.49 | 0.66 | 0.03 | 0.50 | 0.06 |
| GREENE | 6.38 | 0.72 | 0.03 | 0.47 | 0.08 |
| IDA | 6.32 | 0.87 | 0.05 | 0.54 | 0.07 |
| HANCOCK | 6.28 | 0.95 | 0.04 | 0.48 | 0.10 |
| GRUNDY | 5.20 | 0.75 | 0.04 | 0.47 | 0.05 |
| AUDUBON | 5.04 | 0.55 | 0.02 | 0.43 | 0.05 |
| KEOKUK | 4.76 | 0.46 | 0.02 | 0.34 | 0.05 |
| HOWARD | 4.66 | 0.57 | 0.03 | 0.35 | 0.05 |
| POCAHONTAS | 4.42 | 0.51 | 0.03 | 0.32 | 0.05 |
| OSCEOLA | 3.52 | 0.44 | 0.03 | 0.25 | 0.03 |
| TAYLOR | 3.29 | 0.32 | 0.02 | 0.30 | 0.03 |
| <u>ADAMS</u> | <u>2.67</u> | <u>0.32</u> | <u>0.02</u> | <u>0.21</u> | <u>0.03</u> |
| STATE TOTALS | \$8,225.21 | \$1,350.52 | 69.45 | \$502.27 | \$121.98 |

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Table C: Percent Distribution by County, 2016

2016 Domestic Travel Impact on Iowa
Table C: Percent Distribution by County, 2016

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| ADAIR | 0.20% | 0.12% | 0.14% | 0.16% | 0.09% |
| ADAMS | 0.03% | 0.02% | 0.03% | 0.04% | 0.03% |
| ALLAMAKEE | 0.49% | 0.30% | 0.29% | 0.51% | 0.83% |
| APPANOOSE | 0.21% | 0.16% | 0.17% | 0.24% | 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 | 4.38% | 4.44% | 4.28% | 3.91% | 4.13% |
| BOONE | 0.32% | 0.23% | 0.24% | 0.39% | 0.18% |
| BREMER | 0.66% | 0.53% | 0.65% | 0.68% | 0.33% |
| BUCHANAN | 0.32% | 0.20% | 0.19% | 0.38% | 0.25% |
| BUENA VISTA | 0.35% | 0.28% | 0.29% | 0.37% | 0.22% |
| BUTLER | 0.10% | 0.05% | 0.04% | 0.14% | 0.04% |
| CALHOUN | 0.13% | 0.09% | 0.09% | 0.16% | 0.22% |
| CARROLL | 0.70% | 0.57% | 0.65% | 0.74% | 0.36% |
| CASS | 0.32% | 0.22% | 0.23% | 0.36% | 0.15% |
| CEDAR | 0.26% | 0.19% | 0.19% | 0.35% | 0.24% |
| CERRO GORDO | 2.38% | 2.05% | 2.24% | 2.35% | 2.84% |
| 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 | 1.30% | 1.77% | 1.10% | 0.64% | 1.16% |
| CLAYTON | 0.40% | 0.34% | 0.36% | 0.44% | 0.55% |
| CLINTON | 1.45% | 1.31% | 1.45% | 1.51% | 1.31% |
| CRAWFORD | 0.26% | 0.26% | 0.27% | 0.33% | 0.16% |
| DALLAS | 2.31% | 2.32% | 2.67% | 2.39% | 1.41% |
| DAVIS | 0.08% | 0.05% | 0.05% | 0.09% | 0.07% |
| DECATUR | 0.15% | 0.08% | 0.09% | 0.15% | 0.10% |

Table C: Percent Distribution by County, 2016

2016 Domestic Travel Impact on Iowa
Table C: Percent Distribution by County, 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 | 0.10% | 0.07% | 0.07% | 0.12% | 0.08% |
| DES MOINES | 1.66% | 1.86% | 1.57% | 1.42% | 1.65% |
| DICKINSON | 3.34% | 2.58% | 2.86% | 3.70% | 4.16% |
| DUBUQUE | 4.11% | 4.14% | 4.29% | 3.96% | 3.87% |
| EMMET | 0.13% | 0.11% | 0.10% | 0.16% | 0.11% |
| FAYETTE | 0.21% | 0.13% | 0.13% | 0.23% | 0.11% |
| FLOYD | 0.23% | 0.22% | 0.17% | 0.24% | 0.15% |
| 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% | 0.26% | 0.27% |
| HAMILTON | 0.29% | 0.23% | 0.26% | 0.32% | 0.16% |
| HANCOCK | 0.08% | 0.07% | 0.05% | 0.10% | 0.08% |
| HARDIN | 0.27% | 0.16% | 0.15% | 0.25% | 0.13% |
| HARRISON | 0.34% | 0.27% | 0.32% | 0.38% | 0.17% |
| HENRY | 0.27% | 0.25% | 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 | 0.39% | 0.33% | 0.34% | 0.47% | 0.56% |
| JASPER | 0.90% | 0.73% | 0.79% | 0.88% | 0.77% |
| JEFFERSON | 0.49% | 0.47% | 0.54% | 0.50% | 0.28% |
| JOHNSON | 4.86% | 4.77% | 5.51% | 4.83% | 5.36% |
| JONES | 0.26% | 0.16% | 0.15% | 0.32% | 0.13% |
| KEOKUK | 0.06% | 0.03% | 0.03% | 0.07% | 0.04% |

Table C: Percent Distribution by County, 2016

2016 Domestic Travel Impact on Iowa
Table C: Percent Distribution by County, 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 | 0.21% | 0.14% | 0.15% | 0.24% | 0.10% |
| LEE | 0.75% | 0.71% | 0.75% | 0.83% | 0.74% |
| LINN | 9.58% | 10.42% | 9.34% | 8.57% | 10.10% |
| LOUISA | 0.17% | 0.13% | 0.13% | 0.24% | 0.29% |
| LUCAS | 0.09% | 0.07% | 0.07% | 0.10% | 0.07% |
| LYON | 0.08% | 0.05% | 0.05% | 0.10% | 0.05% |
| MADISON | 0.17% | 0.09% | 0.09% | 0.20% | 0.11% |
| MAHASKA | 0.23% | 0.28% | 0.29% | 0.37% | 0.24% |
| MARION | 0.62% | 0.50% | 0.53% | 0.67% | 0.35% |
| MARSHALL | 1.09% | 1.02% | 1.04% | 1.13% | 0.98% |
| MILLS | 0.10% | 0.07% | 0.09% | 0.16% | 0.06% |
| MITCHELL | 0.13% | 0.08% | 0.09% | 0.14% | 0.08% |
| MONONA | 0.24% | 0.24% | 0.24% | 0.26% | 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 | 0.98% | 0.94% | 1.03% | 1.14% | 0.83% |
| 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% | 0.14% |
| PALO ALTO | 0.42% | 0.37% | 0.38% | 0.53% | 0.56% |
| PLYMOUTH | 0.30% | 0.22% | 0.22% | 0.37% | 0.15% |
| POCAHONTAS | 0.05% | 0.04% | 0.04% | 0.06% | 0.04% |
| POLK | 23.75% | 27.00% | 24.77% | 21.63% | 26.89% |
| POTTAWATTAMIE | 3.68% | 4.17% | 4.61% | 4.38% | 3.91% |
| POWESHIEK | 0.58% | 0.45% | 0.45% | 0.69% | 0.78% |
| 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, 2016

2016 Domestic Travel Impact on Iowa**Table C: Percent Distribution by County, 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 | 7.76% | 7.80% | 9.22% | 8.50% | 8.43% |
| SHELBY | 0.18% | 0.13% | 0.13% | 0.20% | 0.11% |
| SIoux | 0.45% | 0.36% | 0.36% | 0.51% | 0.23% |
| STORY | 2.51% | 2.29% | 2.44% | 2.41% | 2.29% |
| TAMA | 0.26% | 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 | 1.04% | 0.88% | 0.94% | 1.17% | 0.93% |
| WARREN | 0.46% | 0.27% | 0.29% | 0.49% | 0.26% |
| WASHINGTON | 0.19% | 0.14% | 0.16% | 0.23% | 0.10% |
| WAYNE | 0.09% | 0.07% | 0.07% | 0.13% | 0.09% |
| WEBSTER | 0.81% | 0.84% | 0.84% | 0.88% | 0.53% |
| WINNEBAGO | 0.14% | 0.08% | 0.08% | 0.17% | 0.07% |
| WINNESHIEK | 0.37% | 0.42% | 0.50% | 0.46% | 0.26% |
| WOODBURY | 3.64% | 3.97% | 3.45% | 3.05% | 3.67% |
| WORTH | 0.08% | 0.04% | 0.04% | 0.09% | 0.03% |
| <u>WRIGHT</u> | <u>0.21%</u> | <u>0.14%</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 2015

| 2016 Domestic Travel Impact on Iowa Table D: Percent Change over 2015 | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| ADAIR | 0.72% | 4.22% | 1.68% | 6.39% | 2.98% |
| ADAMS | 1.07% | 4.59% | 2.04% | 6.77% | 3.35% |
| ALLAMAKEE | 0.00% | 3.48% | 0.96% | 5.64% | 2.26% |
| APPANOOSE | 0.12% | 3.60% | 1.07% | 5.76% | 2.37% |
| AUDUBON | 0.07% | 3.56% | 1.03% | 5.72% | 2.33% |
| BENTON | -0.20% | 3.27% | 0.75% | 5.43% | 2.05% |
| BLACK HAWK | 2.38% | 5.94% | 3.36% | 8.15% | 4.68% |
| BOONE | 0.45% | 3.94% | 1.41% | 6.11% | 2.71% |
| BREMER | 0.41% | 3.91% | 1.38% | 6.08% | 2.68% |
| BUCHANAN | -0.88% | 2.57% | 0.07% | 4.71% | 1.35% |
| BUENA VISTA | -1.01% | 2.44% | -0.06% | 4.58% | 1.22% |
| BUTLER | -0.76% | 2.70% | 0.19% | 4.84% | 1.48% |
| CALHOUN | 0.41% | 3.91% | 1.37% | 6.07% | 2.67% |
| CARROLL | 1.65% | 5.19% | 2.63% | 7.38% | 3.94% |
| CASS | 0.02% | 3.50% | 0.98% | 5.66% | 2.27% |
| CEDAR | -1.96% | 1.45% | -1.02% | 3.57% | 0.25% |
| CERRO GORDO | 2.64% | 6.21% | 3.62% | 8.43% | 4.95% |
| CHEROKEE | 0.21% | 3.70% | 1.17% | 5.86% | 2.46% |
| CHICKASAW | 0.02% | 3.50% | 0.97% | 5.66% | 2.27% |
| CLARKE | 0.11% | 3.59% | 1.07% | 5.75% | 2.36% |
| CLAY | 2.81% | 6.39% | 3.80% | 8.61% | 5.13% |
| CLAYTON | -0.73% | 2.72% | 0.22% | 4.86% | 1.50% |
| CLINTON | 2.63% | 6.20% | 3.61% | 8.42% | 4.94% |
| CRAWFORD | 2.18% | 5.73% | 3.16% | 7.94% | 4.48% |
| DALLAS | 2.39% | 5.96% | 3.37% | 8.17% | 4.70% |
| DAVIS | 1.78% | 5.33% | 2.76% | 7.52% | 4.08% |
| DECATUR | 0.21% | 3.70% | 1.17% | 5.86% | 2.47% |

Table D: Percent Change over 2015

2016 Domestic Travel Impact on Iowa
Table D: Percent Change over 2015 (Continued)

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| DELAWARE | 0.14% | 3.62% | 1.10% | 5.79% | 2.39% |
| DES MOINES | 2.85% | 6.43% | 3.84% | 8.65% | 5.17% |
| DICKINSON | -0.57% | 2.89% | 0.39% | 5.04% | 1.67% |
| DUBUQUE | 2.69% | 6.27% | 3.68% | 8.48% | 5.01% |
| EMMET | 0.16% | 3.65% | 1.12% | 5.81% | 2.42% |
| FAYETTE | 0.09% | 3.57% | 1.05% | 5.73% | 2.34% |
| FLOYD | 2.35% | 5.91% | 3.33% | 8.12% | 4.65% |
| FRANKLIN | 0.12% | 3.61% | 1.08% | 5.77% | 2.38% |
| FREMONT | 1.73% | 5.27% | 2.71% | 7.47% | 4.02% |
| GREENE | 0.90% | 4.42% | 1.87% | 6.60% | 3.18% |
| GRUNDY | 1.06% | 4.58% | 2.03% | 6.76% | 3.34% |
| GUTHRIE | -0.28% | 3.19% | 0.68% | 5.34% | 1.97% |
| HAMILTON | -0.25% | 3.22% | 0.71% | 5.38% | 2.00% |
| HANCOCK | 1.87% | 5.42% | 2.85% | 7.62% | 4.17% |
| HARDIN | -0.82% | 2.64% | 0.13% | 4.78% | 1.42% |
| HARRISON | 0.02% | 3.50% | 0.98% | 5.66% | 2.28% |
| HENRY | 1.31% | 4.83% | 2.28% | 7.02% | 3.59% |
| HOWARD | 1.43% | 4.96% | 2.40% | 7.15% | 3.71% |
| HUMBOLDT | 2.20% | 5.76% | 3.18% | 7.97% | 4.50% |
| IDA | 0.52% | 4.01% | 1.48% | 6.18% | 2.78% |
| IOWA | 0.62% | 4.12% | 1.58% | 6.29% | 2.89% |
| JACKSON | 1.59% | 5.13% | 2.56% | 7.32% | 3.88% |
| JASPER | 0.59% | 4.09% | 1.55% | 6.26% | 2.86% |
| JEFFERSON | 0.14% | 3.63% | 1.10% | 5.79% | 2.40% |
| JOHNSON | 2.81% | 6.39% | 3.80% | 8.61% | 5.13% |
| JONES | -0.28% | 3.19% | 0.67% | 5.34% | 1.96% |
| KEOKUK | 0.62% | 4.12% | 1.59% | 6.30% | 2.89% |

Table D: Percent Change over 2015

2016 Domestic Travel Impact on Iowa
Table D: Percent Change over 2015 (Continued)

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| KOSSUTH | 0.61% | 4.11% | 1.57% | 6.28% | 2.87% |
| LEE | 0.35% | 3.85% | 1.31% | 6.01% | 2.61% |
| LINN | 2.07% | 5.62% | 3.05% | 7.83% | 4.37% |
| LOUISA | 0.10% | 3.59% | 1.06% | 5.75% | 2.36% |
| LUCAS | 0.91% | 4.42% | 1.87% | 6.60% | 3.18% |
| LYON | 0.37% | 3.86% | 1.33% | 6.03% | 2.63% |
| MADISON | 0.04% | 3.52% | 1.00% | 5.68% | 2.29% |
| MAHASKA | -1.10% | 2.35% | -0.15% | 4.48% | 1.13% |
| MARION | 1.27% | 4.80% | 2.24% | 6.98% | 3.55% |
| MARSHALL | 3.41% | 7.01% | 4.40% | 9.24% | 5.74% |
| MILLS | 0.20% | 3.69% | 1.16% | 5.85% | 2.46% |
| MITCHELL | -0.18% | 3.29% | 0.77% | 5.45% | 2.07% |
| MONONA | 1.06% | 4.57% | 2.02% | 6.76% | 3.33% |
| MONROE | 1.01% | 4.52% | 1.98% | 6.70% | 3.28% |
| MONTGOMERY | 1.41% | 4.94% | 2.38% | 7.12% | 3.69% |
| MUSCATINE | 0.50% | 4.00% | 1.46% | 6.17% | 2.76% |
| O'BRIEN | 0.23% | 3.72% | 1.19% | 5.88% | 2.49% |
| OSCEOLA | 0.11% | 3.59% | 1.07% | 5.75% | 2.36% |
| PAGE | -0.15% | 3.32% | 0.80% | 5.48% | 2.10% |
| PALO ALTO | 2.66% | 6.23% | 3.64% | 8.44% | 4.97% |
| PLYMOUTH | 0.91% | 4.42% | 1.88% | 6.60% | 3.18% |
| POCAHONTAS | 0.19% | 3.68% | 1.15% | 5.84% | 2.45% |
| POLK | 2.94% | 6.52% | 3.93% | 8.74% | 5.26% |
| POTTAWATTAMIE | -0.90% | 2.55% | 0.05% | 4.69% | 1.33% |
| POWESHIEK | 0.05% | 3.53% | 1.00% | 5.69% | 2.30% |
| RINGGOLD | -1.22% | 2.22% | 0.07% | 4.35% | 1.01% |
| SAC | -0.32% | 3.14% | 0.63% | 5.30% | 1.92% |

Table D: Percent Change over 2015

2016 Domestic Travel Impact on Iowa
Table D: Percent Change over 2015 (Continued)

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| SCOTT | 2.27% | 5.83% | 3.25% | 8.04% | 4.57% |
| SHELBY | 0.09% | 3.57% | 1.05% | 5.73% | 2.34% |
| SIoux | 0.81% | 4.31% | 1.77% | 6.49% | 3.08% |
| STORY | 2.23% | 5.79% | 3.21% | 7.99% | 4.53% |
| TAMA | 2.51% | 6.08% | 3.49% | 8.29% | 4.82% |
| TAYLOR | -0.37% | 3.09% | 0.58% | 5.25% | 1.87% |
| UNION | 1.44% | 4.97% | 2.41% | 7.16% | 3.73% |
| VAN BUREN | 1.55% | 5.08% | 2.52% | 7.27% | 3.83% |
| WAPELLO | 0.24% | 3.73% | 1.20% | 5.89% | 2.50% |
| WARREN | 1.38% | 4.91% | 2.35% | 7.09% | 3.66% |
| WASHINGTON | 0.85% | 4.36% | 1.82% | 6.54% | 3.13% |
| WAYNE | 1.05% | 4.57% | 2.02% | 6.75% | 3.33% |
| WEBSTER | 1.68% | 5.22% | 2.66% | 7.42% | 3.98% |
| WINNEBAGO | 0.07% | 3.56% | 1.03% | 5.72% | 2.33% |
| WINNESHIEK | 2.36% | 5.93% | 3.34% | 8.14% | 4.67% |
| WOODBURY | 5.05% | 8.70% | 6.05% | 10.97% | 7.41% |
| WORTH | -0.30% | 3.17% | 0.65% | 5.32% | 1.94% |
| <u>WRIGHT</u> | <u>0.44%</u> | <u>3.94%</u> | <u>1.41%</u> | <u>6.11%</u> | <u>2.71%</u> |
| STATE TOTALS | 2.00% | 5.67% | 3.03% | 7.61% | 4.35% |

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Table E: Alphabetical by County, 2015

| 2015 Domestic Travel Impact on Iowa | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table E: Alphabetical by County, 2015 | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| ADAIR | \$16.18 | \$1.53 | 0.09 | \$0.77 | \$0.11 |
| ADAMS | 2.64 | 0.30 | 0.02 | 0.20 | 0.03 |
| ALLAMAKEE | 40.21 | 3.91 | 0.20 | 2.42 | 0.98 |
| APPANOOSE | 17.39 | 2.09 | 0.11 | 1.15 | 0.24 |
| AUDUBON | 5.04 | 0.53 | 0.02 | 0.41 | 0.05 |
| BENTON | 18.30 | 1.71 | 0.10 | 1.42 | 0.12 |
| BLACK HAWK | 351.69 | 56.58 | 2.88 | 18.16 | 4.81 |
| BOONE | 25.98 | 3.02 | 0.16 | 1.86 | 0.21 |
| BREMER | 53.96 | 6.88 | 0.45 | 3.20 | 0.39 |
| BUCHANAN | 26.75 | 2.59 | 0.13 | 1.82 | 0.30 |
| BUENA VISTA | 29.13 | 3.71 | 0.20 | 1.77 | 0.27 |
| BUTLER | 8.59 | 0.69 | 0.03 | 0.65 | 0.05 |
| CALHOUN | 10.30 | 1.20 | 0.06 | 0.78 | 0.26 |
| CARROLL | 56.55 | 7.30 | 0.44 | 3.47 | 0.43 |
| CASS | 26.33 | 2.85 | 0.16 | 1.70 | 0.18 |
| CEDAR | 22.14 | 2.50 | 0.13 | 1.67 | 0.29 |
| CERRO GORDO | 191.09 | 26.10 | 1.50 | 10.91 | 3.30 |
| CHEROKEE | 14.65 | 2.17 | 0.12 | 1.22 | 0.13 |
| CHICKASAW | 10.36 | 1.59 | 0.10 | 0.79 | 0.12 |
| CLARKE | 25.13 | 2.95 | 0.18 | 1.60 | 0.21 |
| CLAY | 103.94 | 22.41 | 0.73 | 2.94 | 1.34 |
| CLAYTON | 33.47 | 4.47 | 0.25 | 2.13 | 0.66 |
| CLINTON | 116.28 | 16.67 | 0.97 | 7.00 | 1.52 |
| CRAWFORD | 20.95 | 3.30 | 0.18 | 1.55 | 0.19 |
| DALLAS | 185.81 | 29.62 | 1.79 | 11.09 | 1.64 |
| DAVIS | 6.86 | 0.66 | 0.04 | 0.44 | 0.08 |
| DECATUR | 12.66 | 1.05 | 0.06 | 0.71 | 0.11 |

Table E: Alphabetical by County, 2015

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

Table E: Alphabetical by County, 2015

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

Table E: Alphabetical by County, 2015

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

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APPENDICES

Appendix A: Travel Economic Impact Model

Introduction

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

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

Definition of Terms

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

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

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

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

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

Employment represents the number of jobs generated by traveler spending, both full and part-time. As such, it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment. *Tax*

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

Description of the Model

Estimates of Travel Expenditures

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

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

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

Estimates of Business Receipts, Payroll and Employment

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

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

spending in a particular type of business to obtain the measures of travel generated employment and payroll of each type of business in each state. For example, the ratio of employees to business receipts in the state commercial lodging establishments is multiplied by travel generated business receipts of these

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

Estimates of Tax Revenues

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

Estimates for Counties and Local Areas

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

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

Limitations of the Study

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

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

Appendix B: Glossary of Terms – TEIM

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

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

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

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

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

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

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

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

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

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

Appendix C: Travel Related Industry by NAICS

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

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

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

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

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

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

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

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

TRAVEL REALTED INDUSTRY BY NAICS

Accommodations

7211 Traveler Accommodations
7212 Recreational Vehicle Parks & Campgrounds

Auto Transportation

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

Entertainment and Recreation

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

Food

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

Public Transportation

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

Retail

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

Travel Arrangement

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

Appendix D: Sources of Data

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

Organizations

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