

The Economic Impact of Travel on Iowa Counties 2018

A Study Prepared for the
Iowa Economic Development Authority
Iowa Tourism Office

By the
Research Department of the
U.S. Travel Association
Washington, D.C.
August 2019

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 2018 and 2017 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
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INTRODUCTION

This report presents preliminary 2018 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, 2017 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 2018 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 nearly \$9 billion (in current dollars) in 2018, representing an increase of 5.8 percent from 2017.
- Total payroll income received by domestic travel-generated employees and workers in Iowa increased 4.1 percent from 2017 to over \$1.4 billion in 2018.
- Domestic traveler expenditures directly generated 70,200 jobs in Iowa during 2018, a 1.0 percent increase from 2017. Domestic travel-generated jobs in Iowa comprised 4.4 percent of total state non-farm employment in 2018.
- On average, every \$128,080 spent by domestic travelers in Iowa during 2018 supported one job. Likewise, every dollar spent by domestic travelers produced 16.1 cents in payroll income for Iowa residents in 2018.
- Domestic traveler spending in Iowa directly generated more than \$1.1 billion in federal, state, and local tax revenue in 2018, up 2.7 percent from 2017.
- Polk County, which includes the city of Des Moines, generated nearly \$2.2 billion in domestic traveler expenditures to lead all Iowa counties in 2018.
- Fifteen of the ninety-nine counties in Iowa received over \$100 million each in domestic travel expenditures in 2018. Thirteen of Iowa's ninety-nine counties had 1,000 or more jobs supported by domestic traveler expenditure.

NATIONAL SUMMARY 2018

The U.S. economy came alive in 2018, the ninth year of economic expansion since the Great Recession of 2007-2009. Real GDP increased at 2.9 percent, the fastest annual growth rate in an economic expansion marked by annual economic growth between one and two percent. On top of robust consumer spending and solid business investment, the economy in 2018 also relied on a labor market performing at historic levels, with nonfarm payrolls at all-time highs and the unemployment rate near the lowest mark in 50 years. However, trade tensions, firming inflation, and sluggish real (inflation-adjusted) wage growth remain headwinds for the economy moving forward.

Consumer spending, which accounts for over two-thirds of the U.S. economy, headlined 2018 economic growth, contributing to nearly two-thirds (1.8 percentage points) of the 2.9 percent real GDP growth rate. As usual, over half of this new spending was toward services (which includes the travel industry). Business investment, inspired by renewed business confidence, contributed over one percentage point to 2018 economic growth, the largest contribution in business investment since 2012. U.S. businesses also contributed to a 4 percent growth in exports in 2018, growth that was cancelled out by a 4.5 percent increase in imports. Exports had an uncommonly volatile year, with fears of increased tariffs between the U.S. and China, leading to large seasonal fluctuations in international trade volumes.

The labor market continued to outperform expectations in 2018, with the national job count of nonfarm payrolls eclipsing 150 million by mid-year. While employment increased by 2.5 million, unemployment fell by nearly 670,000 jobs, bringing the 2018 annual unemployment rate to 3.9 percent, the lowest annual average unemployment rate since 1969. Travel has made a great contribution to the labor market. In 2018, travel generated 8.9 million jobs for the tourism industry. Without the 8.9 million jobs generated by the travel and tourism, that unemployment rate would have been 5.5 percentage points greater (9.4 percent).

Wages also increased in 2018. Average hourly wages for non-supervisory employees increased by just under 3 percent in 2018, the fastest annual growth since 2010. The 3 percent increase in wages meant that wages outpaced inflation in consumer prices in 2018.

Consumer Price Index (CPI) and Travel Price index realized 2.4 percent and 2.5 percent annual average increases, respectively. Core CPI, which excludes food and energy items, remained relatively stable at a 2.1 percent year-over-year average throughout 2018.

Table 1: Overall U.S. Economic Indicators, 2016-2018

<u>Sector</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
Nominal gross domestic product (\$Billions)	18,715.0	19,519.4	20,580.2
Real gross domestic product (\$Billions) *	17,688.9	18,108.1	18,638.2
Real disposable personal income (\$Billions) *	13,608.4	14,002.8	14,556.2
Real personal consumption expenditures (\$Billions) *	12,247.5	12,566.9	12,944.6
Consumer price index**	240.0	245.1	251.1
Travel Price Index**	273.1	279.4	286.5
Non-farm payroll employment (Millions)	144.4	146.6	149.1
Unemployment rate (%)	4.9	4.4	3.9
Percentage change from previous year			
Nominal gross domestic product	2.7%	4.0%	5.4%
Real gross domestic product	1.6%	2.4%	2.9%
Real disposable personal income	1.8%	2.9%	4.0%
Real personal consumption expenditures	2.7%	2.6%	3.0%
Consumer price index	1.3%	2.1%	2.4%
Travel Price Index	0.3%	2.3%	2.5%
Non-farm payroll employment	1.8%	1.6%	1.7%

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

* In chained 2012 dollars

** 1982-84=100

U.S. Travel Volume in 2018

U.S. domestic travel, including leisure and business travel, increased 1.9 percent to a total of 2.3 billion person-trips in 2018. 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 entertainment and recreation purposes, increased 2 percent in 2018 to over 1.8 billion person-trips, even with the growth rate achieved in 2017. U.S. Leisure travel accounted for 80 percent of all U.S. domestic travel in 2018. Leisure person-trips are expected to increase by 1.8 percent in 2019, according to the U.S. Travel Association.

Domestic business person-trips increased 1.6 percent to 464 million in 2018. Business travel is expected continue its recovery from the 2016 contraction, increasing 1.5 percent in 2019.

International arrivals to the U.S. increased 3.5 percent to 79.6 million in 2018. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 39.9 million in 2018 and accounted for 50.6 percent of all international arrivals to the United States. Canadian arrivals to the U.S. increased by 4.9 percent in 2018 and reached 21.2 million. Mexican arrivals increased by 3.9 percent to 18.5 million in 2018.

Travel Expenditures in 2018

Domestic and international travelers spent nearly \$1.1 trillion in the U.S. in 2018, an increase of 4.9 percent (not inflation adjusted) from 2017, the fastest annual growth rate in travel spending since 2014. Travel spending is expected to grow in the next four years. U.S. Travel Association expects travel spending will increase by 2.7 percent in 2019.

Domestic travel spending in 2018 increased by 5.8 percent to nearly \$933 billion while international travel spending did not rebound as expected in 2018, remaining virtually flat at \$156 billion. Domestic and international traveler expenditures are expected to grow 2.9 percent and 1.7 percent in 2019, respectively.

International traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenditures on long-term education, health care and spending by cross border day-trip visitors and seasonal workers. In 2018, international airfare receipts totaled \$41 billion, increasing 1 percent from 2017. Only \$10.3 billion in international airfare receipts were collected in the first quarter of 2019, a decrease of 0.6% percent against the first quarter of 2018.

Accounting for 70 percent of all travel spending, leisure traveler spending totaled \$762 billion in 2018, 6.1 percent increase from 2017. Business traveler spending increased by 2.4 percent to \$319 billion in 2018, accounting for 30 percent of all traveler expenditures.

Table 2: Travel Expenditures - U.S. Nationwide

Category	2017 Spending (\$ Billions)			2018 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$175.1	\$16.4	\$191.6	\$183.6	\$16.8	\$200.4
Auto Transportation	148.9	1.9	150.9	164.6	2.0	166.5
Lodging	172.8	48.9	221.7	182.7	49.4	232.2
Foodservice	224.8	32.8	257.6	234.8	32.9	267.7
Entertainment & Recreation	95.1	13.5	108.6	99.1	13.5	112.6
General Retail Trade	65.1	42.3	107.3	68.0	41.6	109.6
Total	\$881.9	\$155.8	\$1,037.7	\$932.7	\$156.3	\$1,089.0

Source: U.S. Travel Association

* Excludes international passenger fare payments.

Travel Employment in 2018

The 2018 labor market continued to expand at a healthy rate. Over 2018, an average of 149.1 million people was employed on nonfarm payrolls, a 1.7 percent increase from 2017. In addition to creating 2.5 million jobs in 2018, the unemployment rate dropped from 4.4 percent in 2017 to 3.9 percent in 2018, the lowest annual average unemployment rate since 1969. Additionally, the fall in unemployment was progressive and consistent across 2018: the unemployment rate started the year at 4.1 percent and reached as low as 3.7 percent in November 2018 before ending the year at 3.9 percent.

The unemployment rate continues to fall. In both April and May 2019, the monthly unemployment stayed at a 49-year low of 3.6 percent. Moreover, other measures of labor market health continue. During the first five months of 2019, real disposable personal income increased 2.3 percent compared to the first five months of 2018.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery in the current economic expansion period. The 15.8 million service jobs gained from 2010 to 2018 represent 84 percent of the total new jobs over that eight-year period. The travel industry joined health care; administrative services; accommodation and foodservices; and retail trade as one of the leading growth industries in terms of overall jobs created from 2010 to 2018.

In 2018, traveler spending directly supported over 8.9 million U.S. jobs, including both full-time and seasonal/part-time positions, up 1.3 percent from 2017, and accounted for 6 percent of total non-farm employment in the U.S. These 8.9 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2018 national unemployment rate of 3.9 percent would have more-than-doubled to 9.4 percent.

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

Category	2017 Employment (Thousands)			2018 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	977.2	76.2	1,053.5	991.5	76.9	1,068.3
Auto Transportation	304.0	2.4	306.4	306.9	2.3	309.2
Lodging	1,349.8	276.0	1,625.8	1,373.8	273.4	1,647.2
Foodservice	3,138.2	445.2	3,583.4	3,183.7	441.2	3,624.9
Entertainment & Recreation	1,275.0	239.2	1,514.2	1,313.4	240.2	1,553.6
General Retail Trade	381.2	165.0	546.2	382.5	159.2	541.7
Travel Planning	182.8		182.8	183.3		183.3
Total	7,608.2	1,204.0	8,812.2	7,735.0	1,193.3	8,928.3

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

U.S. Travel Forecast

Table 4: U.S. Travel Forecasts

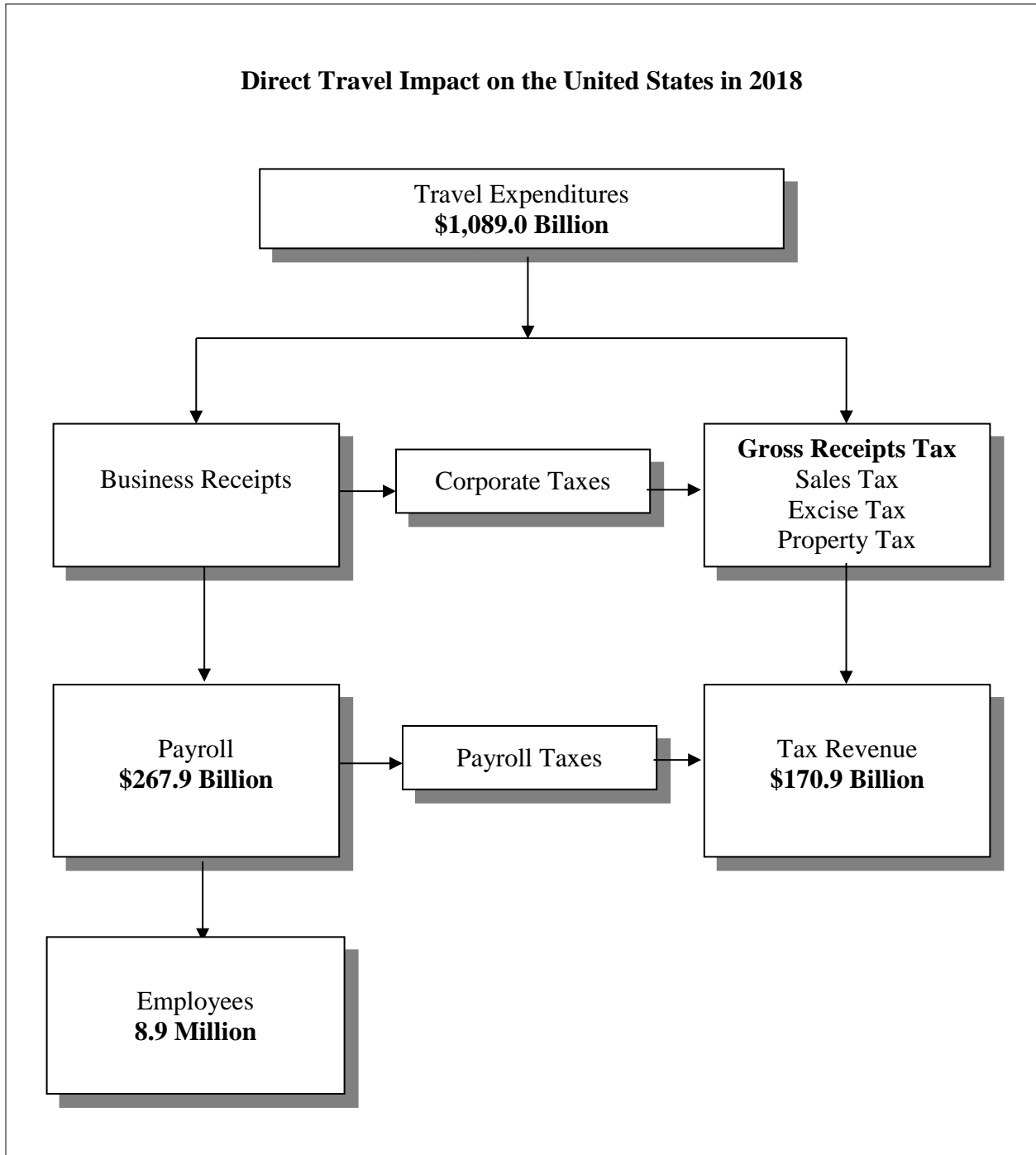
	2016	2017	2018	2019	2020	2021	2022
GDP (\$ Billions of current dollars)	18,715.0	19,519.4	20,580.2	21,446.4	22,208.3	23,051.4	23,956.8
Unemployment Rate (%)	4.9	4.4	3.9	3.6	3.5	3.7	3.8
Consumer Price Index (CPI)*	240.0	245.1	251.1	256.3	261.1	265.9	271.2
Travel Price Index (TPI)*	273.1	279.4	286.5	289.0	293.2	298.5	303.8
Total Travel Expenditures in U.S. (\$ Billions)	994.1	1,037.7	1,089.0	1,118.7	1,160.6	1,209.4	1,257.7
U.S. Residents	838.5	881.9	932.7	959.7	996.3	1,038.3	1,079.6
International Visitors**	155.6	155.8	156.3	159.0	164.4	171.1	178.1
Total International Visitors to the U.S. (Millions)	76.4	76.9	79.6	79.8	82.2	84.9	87.8
Canada	19.3	20.2	21.2	21.0	21.5	22.1	22.8
Mexico	19.0	17.8	18.5	18.2	18.7	19.3	20.0
Overseas Arrivals to the U.S. (Millions)	38.1	38.9	39.9	40.6	42.0	43.5	45.0
Total Domestic Person-Trips (Millions)	2,206.6	2,247.9	2,291.1	2,330.8	2,369.2	2,411.2	2,457.5
Business	454.7	456.3	463.6	470.4	477.0	484.9	493.7
Leisure	1,751.9	1,791.5	1,827.5	1,860.5	1,892.2	1,926.3	1,963.8
Percent Change from Previous Year (%)							
Nominal GDP	1.6	2.4	2.9	2.4	1.6	1.8	1.9
Consumer Price Index (CPI)	1.3	2.1	2.4	2.1	1.9	1.8	2.0
Travel Price Index (TPI)	0.3	2.3	2.5	0.9	1.4	1.8	1.7
Total Travel Expenditures in U.S.	2.0	4.4	4.9	2.7	3.7	4.2	4.0
U.S. Residents	2.9	5.2	5.8	2.9	3.8	4.2	4.0
International Visitors	-2.7	0.1	0.3	1.7	3.4	4.1	4.1
Total International Visitors to the U.S.	-1.8	0.7	3.5	0.2	3.0	3.2	3.5
Canada	-6.8	4.8	4.9	-1.0	2.3	2.9	3.3
Mexico	3.4	-6.1	3.9	-1.9	3.0	3.3	3.5
Overseas Arrivals to the U.S.	-1.5	2.0	2.5	1.9	3.4	3.4	3.5
Total Domestic Person-Trips	1.3	1.9	1.9	1.7	1.6	1.8	1.9
Business	-1.1	0.4	1.6	1.5	1.4	1.6	1.8
Leisure	1.9	2.3	2.0	1.8	1.7	1.8	1.9

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

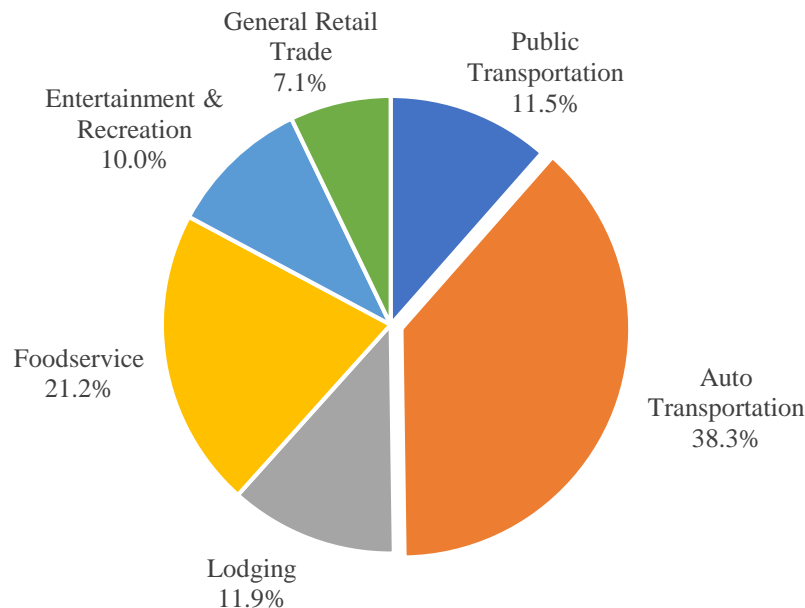
Domestic traveler spending in Iowa totaled nearly \$9 billion (in current dollars) during 2018, representing an increase of 5.8 percent (not inflation adjusted) from 2017.

Auto transportation, foodservices and lodging are the top three spending categories for domestic travelers in Iowa. Domestic travelers spent \$3.4 billion on auto transportation, up 8.7 percent from 2017, partially reflecting the significant increase in gasoline price in 2018. This sector accounted for 38.3 percent of total domestic travelers' spending in Iowa.

Accounting for 21.2 percent of the state total domestic traveler expenditures, spending on foodservice rose 4.3 percent to \$1.9 billion in 2018. Domestic travelers' spending on lodging grew 4.2 percent to nearly \$1.1 billion in 2018.

In 2018, domestic travelers' spending on public transportation was up 6.9 percent from 2017 to \$1.0 billion. Domestic travelers spent \$903.2 million on the entertainment and recreation sector in 2018, up 1.9 percent from 2017. Domestic travelers' spending on general retail increased 2.6 percent to \$642.6 million in 2018.

**Domestic Travel Expenditures in Iowa in 2018
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, 2017-2018

<i>2018 Travel Expenditures</i>	Total (\$ Millions)	% of Total (Percent)
Public Transportation	\$1,033.1	11.5%
Auto Transportation	3,444.9	38.3%
Lodging	1,067.1	11.9%
Foodservice	1,904.7	21.2%
Entertainment & Recreation	903.2	10.0%
General Retail Trade	642.6	7.1%
Total	\$8,995.6	100.0%
 <i>2017 Travel Expenditures</i>		
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>Percent Change 2018 over 2017</i>		
Public Transportation	6.9%	
Auto Transportation	8.7%	
Lodging	4.2%	
Foodservice	4.3%	
Entertainment & Recreation	1.9%	
General Retail Trade	2.6%	
Total	5.8%	

Source: U.S. Travel Association

TRAVEL-GENERATED PAYROLL

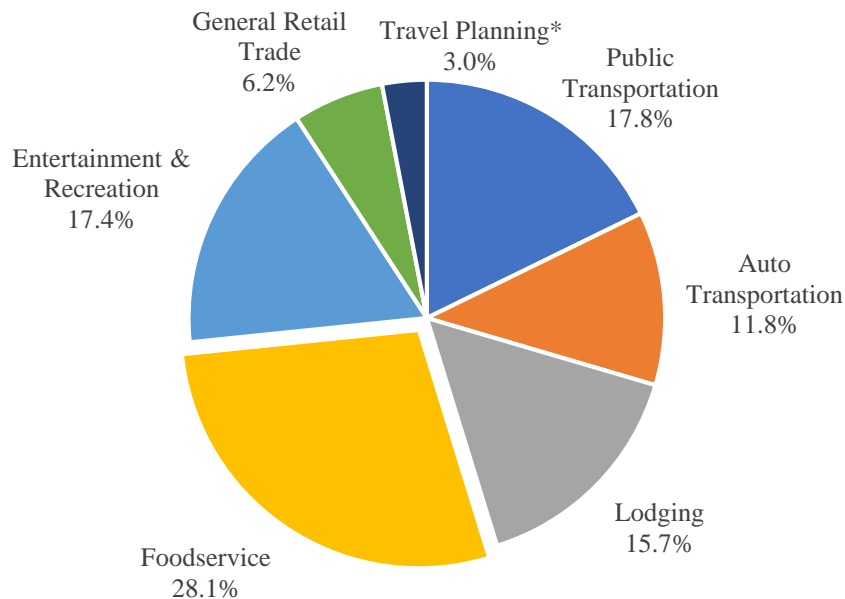
Travel-generated payroll is defined as the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry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

In 2018, total payroll income received by domestic travel-generated employees and workers in Iowa increased 4.1 percent from 2017 to over \$1.4 billion. On the average, every dollar spent by domestic travelers produced 16.1 cents in payroll income in Iowa during 2018.

The foodservice sector, which posted the highest share of payroll (28.1 percent) among the seven industry sectors investigated in this report, was up 3.7 percent from 2017 to \$407.2 million.

Public transportation, the second largest sector (17.8 percent) in the Iowa travel industry by domestic travel-generated payroll, increased 3.2 percent from 2017 to \$257.0 million. The entertainment and recreation sector followed very closely, reaching \$252.2 million in 2018.

**Domestic Travel-Generated Payroll in Iowa in 2018
by Industry Sector**



Domestic Travel Generated Payroll

Table 6: Domestic Travel-Generated Payroll in Iowa by Industry Sector, 2017-2018

<i>2018 Payroll</i>	<u>Total</u> <u>(\$ Millions)</u>	<u>% of Total</u> <u>(Percent)</u>
Public Transportation	\$257.0	17.8%
Auto Transportation	170.6	11.8%
Lodging	226.9	15.7%
Foodservice	407.2	28.1%
Entertainment & Recreation	252.2	17.4%
General Retail Trade	89.3	6.2%
Travel Planning*	43.7	3.0%
Total	\$1,446.9	100.0%
 <i>2017 Payroll</i>		
Public Transportation	\$249.0	17.9%
Auto Transportation	164.7	11.5%
Lodging	219.5	13.7%
Foodservice	392.7	26.5%
Entertainment & Recreation	244.5	20.8%
General Retail Trade	88.4	6.5%
Travel Planning*	30.8	2.6%
Total	\$1,389.6	100.0%
 <i>Percent Change</i> <i>2018 over 2017</i>		
Public Transportation	3.2%	
Auto Transportation	3.6%	
Lodging	3.4%	
Foodservice	3.7%	
Entertainment & Recreation	3.2%	
General Retail Trade	1.1%	
Travel Planning*	41.9%	
Total	4.1%	

Source: U.S. Travel Association

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

TRAVEL-GENERATED EMPLOYMENT

Travel's most impressive contribution to Iowa's 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 2018 increased 1.0 percent from 2017 to 70,200.

On the average, every \$128,080 spent by domestic travelers in Iowa directly supported one job in 2018.

The 70,200 jobs supported by domestic travel in Iowa comprised 4.4 percent of state's total non-agricultural employment during 2018. Without these jobs generated by domestic travel, Iowa's 2018 unemployment rate of 2.5 percent would have been 4.2 percentage points higher to 6.7 percent.

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 2018, 26,300 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 0.5 percent from 2017.

Domestic travel directly supported 13,900 jobs in the entertainment and recreation sector in 2018, the second largest component of the state total. The lodging sector supported 12,300 jobs in 2018.

**Domestic Travel-Generated Employment in Iowa in 2018
by Industry Sector**

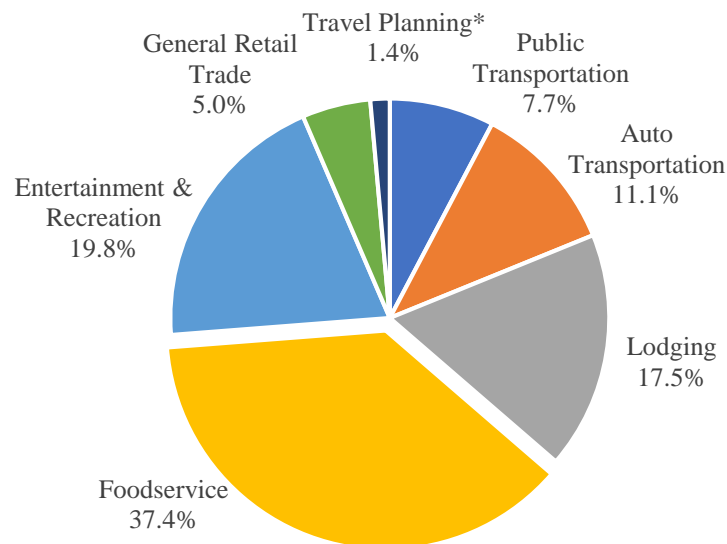


Table 7: Domestic Travel-Generated Employment in Iowa by Industry Sector, 2017-2018

<i>2018 Employment</i>	Total (Thousand)	% of Total (Percent)
Public Transportation	5.4	7.7%
Auto Transportation	7.8	11.1%
Lodging	12.3	17.5%
Foodservice	26.3	37.4%
Entertainment & Recreation	13.9	19.8%
General Retail Trade	3.5	5.0%
Travel Planning*	1.0	1.4%
Total	70.2	100.0%
<i>2017 Employment</i>		
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%
<i>Percent Change</i>		
<i>2018 over 2017</i>		
Public Transportation	2.4%	
Auto Transportation	0.6%	
Lodging	-0.7%	
Foodservice	0.5%	
Entertainment & Recreation	1.7%	
General Retail Trade	-0.6%	
Travel Planning*	29.0%	
Total	1.0%	

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

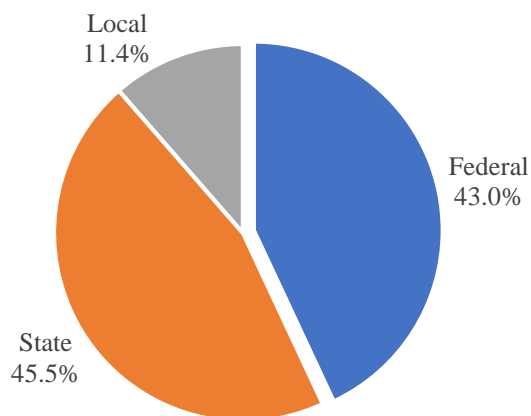
Travel tax receipts are defined in this report as the federal, state and local tax revenues attributable to travel spending in Iowa. Travel-generated tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public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

In 2018, total tax revenues directly generated by domestic travelers' spending in Iowa grew 2.7 percent from 2017 to a total of more than \$1.1 billion. The federal government collected a total of \$489.1 million from domestic traveler spending, an increase of 3.1 percent. The tax revenue collected by the federal government accounted for 43.0 percent of all domestic travel-generated tax revenues in Iowa. Each dollar spent by domestic travelers in Iowa produced 5.4 cents for federal tax coffers.

The tax revenue generated by domestic travelers' spending for Iowa's state treasury rose 2.1 percent to a total of \$517.5 million, accounting for 45.5 percent of all domestic travel-generated tax revenue for 2018. On average, each domestic travel dollar produced 5.8 cents in tax revenue for Iowa's state government.

The tax revenue collected by the local governments (counties and cities) was 4.3 percent higher than in 2017, for a total of \$129.6 million. Each domestic travel dollar produced 1.4 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue in Iowa
in 2018 by Level of Government**



Domestic Travel-Generated Tax Revenue

Table 8: Domestic Travel-Generated Tax Revenue in Iowa by Level of Government, 2017-2018

<i>2018 Tax Revenue</i>	Total (\$ Millions)	% of Total (Percent)
Federal	\$489.1	43.0%
State	517.5	45.5%
Local	129.6	11.4%
Total	\$1,136.1	100.0%
 <i>2017 Tax Revenue</i>		
Federal	\$474.4	42.9%
State	507.1	45.9%
Local	124.2	11.2%
Total	\$1,105.7	100.0%
 <i>Percent Change 2018 over 2017</i>		
Federal	3.1%	
State	2.1%	
Local	4.3%	
Total	2.7%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON IOWA COUNTIES

In 2018, domestic travel expenditures in Iowa totaled close to \$9 billion (in current dollars), representing an increase of 5.8 percent (not inflation adjusted) from 2017. This spending directly generated 70,200 jobs and over \$1.4 billion in payroll income. Additionally, a total of \$647.1 million in tax revenues was generated for state and local governments.

Travel expenditures occurred in all 99 Iowa counties. The top five counties in Iowa received over \$4.5 billion in direct domestic travel expenditures, accounting for one half of the state total (50.5 percent). Domestic travel spending in the top five counties generated \$791.2 million in payroll (54.7 percent of the state total) and 37,500 jobs (53.3 percent of the state total) in 2018.

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 2018. Domestic traveler expenditures in Polk County reached nearly \$2.2 billion, accounting for 24.0 percent of the state total. These expenditures generated \$394.6 million in payroll income and 17,600 jobs for county residents.

Linn County, which includes the city of Cedar Rapids, ranked second with \$873.8 million in domestic travel spending in 2018, representing 9.7 percent of the state total. Payroll income and jobs directly attributed to domestic traveler spending totaled \$152.9 million and 6,700 jobs.

Scott County, which includes the city of Davenport, posted \$696.1 million in domestic expenditures to rank third. These expenditures generated \$112.5 million in payroll as well as 6,500 jobs within the county.

Johnson County, which includes the city of Iowa City, ranked fourth with \$431.8 million in domestic travel expenditures. These travel expenditures benefited county residents with \$68.2 million in payroll income and 3,800 jobs.

Black Hawk County, which includes the cities of Cedar Falls and Waterloo, ranked fifth by domestic travel spending in 2018. Domestic travelers spent \$386.2 million in the county, generating \$63.0 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, 2017-2018

2018 Travel Impact

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
POLK	\$2,158.6	\$394.6	17.6	\$113.1	\$35.2
LINN	873.8	152.9	6.7	45.0	13.3
SCOTT	696.1	112.5	6.5	43.9	10.9
JOHNSON	431.8	68.2	3.8	24.7	6.9
BLACK HAWK	386.2	63.0	3.0	19.8	5.2
FIVE COUNTY TOTALS	\$4,546.5	\$791.2	37.5	\$246.5	\$71.4
STATE TOTALS	\$8,995.6	\$1,446.9	70.2	\$517.5	\$129.6
FIVE COUNTY SHARES	50.5%	54.7%	53.3%	47.6%	55.1%

2017 Travel Impact

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%

Percent Change - 2018 over 2017

POLK	6.7%	5.0%	1.8%	2.9%	5.2%
LINN	6.6%	4.9%	1.7%	2.8%	5.1%
SCOTT	5.6%	3.9%	0.7%	1.8%	4.1%
JOHNSON	4.7%	3.0%	0.0%	1.0%	3.2%
BLACK HAWK	4.8%	3.1%	0.0%	1.0%	3.3%
FIVE COUNTY TOTALS	6.2%	4.5%	1.3%	2.3%	4.7%
STATE TOTALS	5.8%	4.1%	1.0%	2.1%	4.3%

Source: U.S. Travel Association

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the U.S. Travel's Travel Economic Impact Model for Iowa 2017 and 2018 estimates by county. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2018 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 2018 travel expenditures from highest to lowest.

Table C shows the percent distribution for each impact measure in 2018.

Table D shows the percent change in 2018 over 2017 estimates for each of the measures of economic impact.

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

Table A: Alphabetical by County, 2018

2018 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2018					
<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	\$18.23	\$1.75	0.10	\$0.86	\$0.12
ADAMS	2.91	0.34	0.02	0.22	0.04
ALLAMAKEE	44.91	4.43	0.21	2.69	1.09
APPANOOSE	19.40	2.36	0.12	1.28	0.26
AUDUBON	5.61	0.60	0.02	0.45	0.06
BENTON	20.10	1.91	0.10	1.55	0.13
BLACK HAWK	386.23	62.99	2.95	19.85	5.24
BOONE	28.46	3.35	0.17	2.03	0.23
BREMER	59.95	7.75	0.46	3.54	0.43
BUCHANAN	29.53	2.90	0.14	1.99	0.32
BUENA VISTA	30.59	3.94	0.20	1.85	0.28
BUTLER	9.64	0.78	0.03	0.72	0.05
CALHOUN	11.39	1.35	0.06	0.86	0.29
CARROLL	62.60	8.19	0.45	3.82	0.47
CASS	29.82	3.27	0.17	1.92	0.21
CEDAR	24.01	2.75	0.13	1.81	0.31
CERRO GORDO	214.46	29.69	1.57	12.18	3.68
CHEROKEE	15.84	2.38	0.12	1.31	0.14
CHICKASAW	11.46	1.78	0.10	0.87	0.13
CLARKE	27.40	3.27	0.18	1.74	0.23
CLAY	115.12	25.16	0.76	3.24	1.48
CLAYTON	36.31	4.91	0.25	2.29	0.71
CLINTON	125.76	18.28	0.98	7.53	1.63
CRAWFORD	22.20	3.55	0.18	1.63	0.20
DALLAS	203.90	32.94	1.84	12.11	1.79
DAVIS	7.83	0.77	0.04	0.50	0.09
DECATUR	13.92	1.17	0.06	0.78	0.13

Table A: Alphabetical by County, 2018

2018 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2018 (Continued)					
<u>County</u>	<u>Expenditures (\$ Millions)</u>	<u>Payroll (\$ Millions)</u>	<u>Employment (Thousands)</u>	<u>State Tax Receipts (\$ Millions)</u>	<u>Local Tax Receipts (\$ Millions)</u>
DELAWARE	9.43	1.00	0.05	0.63	0.10
DES MOINES	144.94	26.14	1.07	7.12	2.08
DICKINSON	302.52	37.65	2.02	19.29	5.43
DUBUQUE	365.75	59.22	2.98	20.28	4.95
EMMET	12.25	1.61	0.07	0.85	0.15
FAYETTE	19.01	1.99	0.09	1.22	0.15
FLOYD	20.13	3.08	0.12	1.23	0.19
FRANKLIN	13.00	1.41	0.07	0.91	0.08
FREMONT	16.50	2.28	0.12	1.05	0.15
GREENE	7.08	0.78	0.03	0.49	0.08
GRUNDY	5.74	0.81	0.04	0.49	0.05
GUTHRIE	14.20	2.09	0.10	1.38	0.35
HAMILTON	26.26	3.39	0.18	1.65	0.21
HANCOCK	6.80	1.00	0.04	0.49	0.11
HARDIN	24.24	2.33	0.11	1.30	0.17
HARRISON	29.86	3.80	0.22	1.92	0.21
HENRY	23.34	3.49	0.17	1.41	0.33
HOWARD	5.06	0.61	0.03	0.35	0.06
HUMBOLDT	13.12	2.14	0.07	0.58	0.15
IDA	6.87	0.93	0.05	0.55	0.07
IOWA	46.76	7.42	0.43	3.20	0.72
JACKSON	34.20	4.68	0.24	2.39	0.71
JASPER	78.91	10.31	0.55	4.47	0.97
JEFFERSON	42.48	6.53	0.36	2.47	0.35
JOHNSON	431.83	68.23	3.83	24.72	6.86
JONES	23.73	2.36	0.11	1.69	0.16
KEOKUK	5.28	0.50	0.02	0.35	0.06

Table A: Alphabetical by County, 2018

2018 Domestic Travel Impact on Iowa						
Table A: Alphabetical by County, 2018 (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	19.02	2.04	0.11	1.28	0.13	
LEE	64.88	9.90	0.51	4.15	0.93	
LINN	873.81	152.87	6.65	44.97	13.26	
LOUISA	15.23	1.93	0.10	1.29	0.38	
LUCAS	8.56	0.99	0.05	0.55	0.09	
LYON	7.13	0.71	0.03	0.52	0.06	
MADISON	15.31	1.36	0.07	1.05	0.14	
MAHASKA	20.04	4.02	0.20	1.85	0.30	
MARION	55.39	7.07	0.37	3.43	0.45	
MARSHALL	96.18	14.50	0.72	5.75	1.25	
MILLS	8.95	1.07	0.06	0.81	0.08	
MITCHELL	11.95	1.25	0.06	0.73	0.11	
MONONA	20.76	3.39	0.17	1.30	0.26	
MONROE	9.11	1.63	0.09	0.80	0.11	
MONTGOMERY	22.95	4.09	0.23	1.98	0.25	
MUSCATINE	87.58	13.48	0.72	5.85	1.07	
O'BRIEN	24.32	3.09	0.16	1.62	0.18	
OSCEOLA	3.89	0.48	0.03	0.27	0.04	
PAGE	19.82	1.99	0.10	1.31	0.19	
PALO ALTO	37.43	5.39	0.27	2.71	0.72	
PLYMOUTH	27.15	3.18	0.16	1.90	0.20	
POCAHONTAS	4.83	0.55	0.03	0.33	0.05	
POLK	2,158.58	394.61	17.57	113.06	35.17	
POTTAWATTAMIE	334.69	61.14	3.28	22.95	5.12	
POWESHIEK	54.46	6.89	0.33	3.73	1.06	
RINGGOLD	11.30	1.07	0.05	0.83	0.22	
SAC	17.03	1.66	0.08	1.14	0.34	

Table A: Alphabetical by County, 2018

2018 Domestic Travel Impact on Iowa					
Table A: Alphabetical by County, 2018 (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	696.07	112.53	6.46	43.86	10.88
SHELBY	16.05	1.84	0.09	1.06	0.15
SIOUX	40.20	5.21	0.26	2.67	0.29
STORY	225.66	33.08	1.72	12.43	2.96
TAMA	22.61	3.58	0.19	1.44	0.24
TAYLOR	3.70	0.35	0.02	0.32	0.04
UNION	16.59	2.31	0.13	1.28	0.18
VAN BUREN	7.25	0.96	0.05	0.57	0.09
WAPELLO	91.33	12.37	0.64	5.90	1.18
WARREN	41.88	3.93	0.21	2.61	0.34
WASHINGTON	17.44	2.03	0.11	1.18	0.13
WAYNE	7.92	0.97	0.05	0.70	0.12
WEBSTER	74.83	12.43	0.60	4.68	0.70
WINNEBAGO	12.79	1.15	0.06	0.88	0.09
WINNESHIEK	33.84	6.11	0.36	2.43	0.34
WOODBURY	323.40	56.74	2.39	15.57	4.69
WORTH	7.40	0.56	0.03	0.46	0.05
<u>WRIGHT</u>	<u>19.45</u>	<u>2.13</u>	<u>0.09</u>	<u>1.24</u>	<u>0.30</u>
STATE TOTALS	\$8,995.62	\$1,446.93	70.23	\$517.50	\$129.58

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Table B: Ranking of Counties by Expenditure Levels, 2018

2018 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2018					
<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	\$2,158.58	\$394.61	17.57	\$113.06	\$35.17
LINN	873.81	152.87	6.65	44.97	13.26
SCOTT	696.07	112.53	6.46	43.86	10.88
JOHNSON	431.83	68.23	3.83	24.72	6.86
BLACK HAWK	386.23	62.99	2.95	19.85	5.24
DUBUQUE	365.75	59.22	2.98	20.28	4.95
POTTAWATTAMIE	334.69	61.14	3.28	22.95	5.12
WOODBURY	323.40	56.74	2.39	15.57	4.69
DICKINSON	302.52	37.65	2.02	19.29	5.43
STORY	225.66	33.08	1.72	12.43	2.96
CERRO GORDO	214.46	29.69	1.57	12.18	3.68
DALLAS	203.90	32.94	1.84	12.11	1.79
DES MOINES	144.94	26.14	1.07	7.12	2.08
CLINTON	125.76	18.28	0.98	7.53	1.63
CLAY	115.12	25.16	0.76	3.24	1.48
MARSHALL	96.18	14.50	0.72	5.75	1.25
WAPELLO	91.33	12.37	0.64	5.90	1.18
MUSCATINE	87.58	13.48	0.72	5.85	1.07
JASPER	78.91	10.31	0.55	4.47	0.97
WEBSTER	74.83	12.43	0.60	4.68	0.70
LEE	64.88	9.90	0.51	4.15	0.93
CARROLL	62.60	8.19	0.45	3.82	0.47
BREMER	59.95	7.75	0.46	3.54	0.43
MARION	55.39	7.07	0.37	3.43	0.45
POWESHIEK	54.46	6.89	0.33	3.73	1.06
IOWA	46.76	7.42	0.43	3.20	0.72
ALLAMAKEE	44.91	4.43	0.21	2.69	1.09

Table B: Ranking of Counties by Expenditure Levels, 2018

2018 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2018 (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	42.48	6.53	0.36	2.47	0.35	
WARREN	41.88	3.93	0.21	2.61	0.34	
SIOUX	40.20	5.21	0.26	2.67	0.29	
PALO ALTO	37.43	5.39	0.27	2.71	0.72	
CLAYTON	36.31	4.91	0.25	2.29	0.71	
JACKSON	34.20	4.68	0.24	2.39	0.71	
WINNESHIEK	33.84	6.11	0.36	2.43	0.34	
BUENA VISTA	30.59	3.94	0.20	1.85	0.28	
HARRISON	29.86	3.80	0.22	1.92	0.21	
CASS	29.82	3.27	0.17	1.92	0.21	
BUCHANAN	29.53	2.90	0.14	1.99	0.32	
BOONE	28.46	3.35	0.17	2.03	0.23	
CLARKE	27.40	3.27	0.18	1.74	0.23	
PLYMOUTH	27.15	3.18	0.16	1.90	0.20	
HAMILTON	26.26	3.39	0.18	1.65	0.21	
O'BRIEN	24.32	3.09	0.16	1.62	0.18	
HARDIN	24.24	2.33	0.11	1.30	0.17	
CEDAR	24.01	2.75	0.13	1.81	0.31	
JONES	23.73	2.36	0.11	1.69	0.16	
HENRY	23.34	3.49	0.17	1.41	0.33	
MONTGOMERY	22.95	4.09	0.23	1.98	0.25	
TAMA	22.61	3.58	0.19	1.44	0.24	
CRAWFORD	22.20	3.55	0.18	1.63	0.20	
MONONA	20.76	3.39	0.17	1.30	0.26	
FLOYD	20.13	3.08	0.12	1.23	0.19	
BENTON	20.10	1.91	0.10	1.55	0.13	
MAHASKA	20.04	4.02	0.20	1.85	0.30	

Table B: Ranking of Counties by Expenditure Levels, 2018

2018 Domestic Travel Impact on Iowa						
Table B: Ranking of Counties by Expenditure Levels, 2018 (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	19.82	1.99	0.10	1.31	0.19	
WRIGHT	19.45	2.13	0.09	1.24	0.30	
APPANOOSE	19.40	2.36	0.12	1.28	0.26	
KOSSUTH	19.02	2.04	0.11	1.28	0.13	
FAYETTE	19.01	1.99	0.09	1.22	0.15	
ADAIR	18.23	1.75	0.10	0.86	0.12	
WASHINGTON	17.44	2.03	0.11	1.18	0.13	
SAC	17.03	1.66	0.08	1.14	0.34	
UNION	16.59	2.31	0.13	1.28	0.18	
FREMONT	16.50	2.28	0.12	1.05	0.15	
SHELBY	16.05	1.84	0.09	1.06	0.15	
CHEROKEE	15.84	2.38	0.12	1.31	0.14	
MADISON	15.31	1.36	0.07	1.05	0.14	
LOUISA	15.23	1.93	0.10	1.29	0.38	
GUTHRIE	14.20	2.09	0.10	1.38	0.35	
DECATUR	13.92	1.17	0.06	0.78	0.13	
HUMBOLDT	13.12	2.14	0.07	0.58	0.15	
FRANKLIN	13.00	1.41	0.07	0.91	0.08	
WINNEBAGO	12.79	1.15	0.06	0.88	0.09	
EMMET	12.25	1.61	0.07	0.85	0.15	
MITCHELL	11.95	1.25	0.06	0.73	0.11	
CHICKASAW	11.46	1.78	0.10	0.87	0.13	
CALHOUN	11.39	1.35	0.06	0.86	0.29	
RINGGOLD	11.30	1.07	0.05	0.83	0.22	
BUTLER	9.64	0.78	0.03	0.72	0.05	
DELAWARE	9.43	1.00	0.05	0.63	0.10	
MONROE	9.11	1.63	0.09	0.80	0.11	

Table B: Ranking of Counties by Expenditure Levels, 2018

2018 Domestic Travel Impact on Iowa					
Table B: Ranking of Counties by Expenditure Levels, 2018 (Continued)					
<u>County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
MILLS	8.95	1.07	0.06	0.81	0.08
LUCAS	8.56	0.99	0.05	0.55	0.09
WAYNE	7.92	0.97	0.05	0.70	0.12
DAVIS	7.83	0.77	0.04	0.50	0.09
WORTH	7.40	0.56	0.03	0.46	0.05
VAN BUREN	7.25	0.96	0.05	0.57	0.09
LYON	7.13	0.71	0.03	0.52	0.06
GREENE	7.08	0.78	0.03	0.49	0.08
IDA	6.87	0.93	0.05	0.55	0.07
HANCOCK	6.80	1.00	0.04	0.49	0.11
GRUNDY	5.74	0.81	0.04	0.49	0.05
AUDUBON	5.61	0.60	0.02	0.45	0.06
KEOKUK	5.28	0.50	0.02	0.35	0.06
HOWARD	5.06	0.61	0.03	0.35	0.06
POCAHONTAS	4.83	0.55	0.03	0.33	0.05
OSCEOLA	3.89	0.48	0.03	0.27	0.04
TAYLOR	3.70	0.35	0.02	0.32	0.04
<u>ADAMS</u>	<u>2.91</u>	<u>0.34</u>	<u>0.02</u>	<u>0.22</u>	<u>0.04</u>
STATE TOTALS	\$8,995.62	\$1,446.93	70.23	\$517.50	\$129.58

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Table C: Percent Distribution by County, 2018

2018 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2018					
<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%	0.84%
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	4.29%	4.35%	4.20%	3.84%	4.04%
BOONE	0.32%	0.23%	0.24%	0.39%	0.18%
BREMER	0.67%	0.54%	0.66%	0.68%	0.33%
BUCHANAN	0.33%	0.20%	0.19%	0.39%	0.25%
BUENA VISTA	0.34%	0.27%	0.28%	0.36%	0.22%
BUTLER	0.11%	0.05%	0.05%	0.14%	0.04%
CALHOUN	0.13%	0.09%	0.09%	0.17%	0.22%
CARROLL	0.70%	0.57%	0.64%	0.74%	0.36%
CASS	0.33%	0.23%	0.24%	0.37%	0.16%
CEDAR	0.27%	0.19%	0.19%	0.35%	0.24%
CERRO GORDO	2.38%	2.05%	2.24%	2.35%	2.84%
CHEROKEE	0.18%	0.16%	0.18%	0.25%	0.11%
CHICKASAW	0.13%	0.12%	0.14%	0.17%	0.10%
CLARKE	0.30%	0.23%	0.26%	0.34%	0.18%
CLAY	1.28%	1.74%	1.08%	0.63%	1.14%
CLAYTON	0.40%	0.34%	0.36%	0.44%	0.55%
CLINTON	1.40%	1.26%	1.40%	1.46%	1.26%
CRAWFORD	0.25%	0.25%	0.26%	0.32%	0.16%
DALLAS	2.27%	2.28%	2.62%	2.34%	1.38%
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, 2018

2018 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2018 (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	1.61%	1.81%	1.52%	1.38%	1.60%
DICKINSON	3.36%	2.60%	2.88%	3.73%	4.19%
DUBUQUE	4.07%	4.09%	4.24%	3.92%	3.82%
EMMET	0.14%	0.11%	0.10%	0.16%	0.11%
FAYETTE	0.21%	0.14%	0.13%	0.24%	0.12%
FLOYD	0.22%	0.21%	0.17%	0.24%	0.14%
FRANKLIN	0.14%	0.10%	0.10%	0.18%	0.06%
FREMONT	0.18%	0.16%	0.17%	0.20%	0.12%
GREENE	0.08%	0.05%	0.05%	0.09%	0.07%
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%	0.23%	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%	0.24%	0.27%	0.25%
HOWARD	0.06%	0.04%	0.04%	0.07%	0.04%
HUMBOLDT	0.15%	0.15%	0.10%	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%	0.32%	0.34%	0.46%	0.55%
JASPER	0.88%	0.71%	0.78%	0.86%	0.75%
JEFFERSON	0.47%	0.45%	0.52%	0.48%	0.27%
JOHNSON	4.80%	4.72%	5.45%	4.78%	5.29%
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, 2018

2018 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2018 (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	0.72%	0.68%	0.73%	0.80%	0.71%
LINN	9.71%	10.57%	9.47%	8.69%	10.23%
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	0.62%	0.49%	0.52%	0.66%	0.35%
MARSHALL	1.07%	1.00%	1.02%	1.11%	0.97%
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%	0.23%	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	0.97%	0.93%	1.02%	1.13%	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%	0.15%	0.25%	0.15%
PALO ALTO	0.42%	0.37%	0.38%	0.52%	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	24.00%	27.27%	25.02%	21.85%	27.14%
POTTAWATTAMIE	3.72%	4.23%	4.67%	4.43%	3.95%
POWESHIEK	0.61%	0.48%	0.47%	0.72%	0.82%
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, 2018

2018 Domestic Travel Impact on Iowa					
Table C: Percent Distribution by County, 2018 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SCOTT	7.74%	7.78%	9.19%	8.48%	8.40%
SHELBY	0.18%	0.13%	0.13%	0.20%	0.11%
SIOUX	0.45%	0.36%	0.36%	0.52%	0.23%
STORY	2.51%	2.29%	2.45%	2.40%	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%	0.85%	0.91%	1.14%	0.91%
WARREN	0.47%	0.27%	0.30%	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	0.83%	0.86%	0.85%	0.90%	0.54%
WINNEBAGO	0.14%	0.08%	0.09%	0.17%	0.07%
WINNESHIEK	0.38%	0.42%	0.51%	0.47%	0.26%
WOODBURY	3.60%	3.92%	3.41%	3.01%	3.62%
WORTH	0.08%	0.04%	0.04%	0.09%	0.04%
<u>WRIGHT</u>	<u>0.22%</u>	<u>0.15%</u>	<u>0.13%</u>	<u>0.24%</u>	<u>0.23%</u>
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change over 2017

2018 Domestic Travel Impact on Iowa					
Table D: Percent Change over 2017					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ADAIR	6.60%	4.86%	1.69%	2.79%	5.05%
ADAMS	5.21%	3.49%	0.37%	1.45%	3.69%
ALLAMAKEE	5.08%	3.36%	0.24%	1.32%	3.55%
APPANOOSE	5.41%	3.69%	0.56%	1.64%	3.88%
AUDUBON	6.52%	4.78%	1.61%	2.70%	4.97%
BENTON	6.94%	5.20%	2.02%	3.12%	5.39%
BLACK HAWK	4.79%	3.08%	-0.01%	1.04%	3.27%
BOONE	6.97%	5.22%	2.05%	3.14%	5.42%
BREMER	5.90%	4.17%	1.03%	2.11%	4.36%
BUCHANAN	6.12%	4.39%	1.24%	2.33%	4.58%
BUENA VISTA	4.82%	3.10%	-0.01%	1.06%	3.29%
BUTLER	7.73%	5.97%	2.77%	3.87%	6.17%
CALHOUN	7.01%	5.26%	2.09%	3.18%	5.46%
CARROLL	3.59%	1.90%	-1.18%	-0.12%	2.09%
CASS	6.97%	5.22%	2.05%	3.14%	5.42%
CEDAR	5.22%	3.50%	0.37%	1.45%	3.69%
CERRO GORDO	6.28%	4.55%	1.39%	2.48%	4.74%
CHEROKEE	4.47%	2.76%	-0.34%	0.73%	2.95%
CHICKASAW	5.49%	3.76%	0.63%	1.71%	3.95%
CLARKE	5.16%	3.44%	0.32%	1.40%	3.64%
CLAY	5.40%	3.68%	0.55%	1.63%	3.87%
CLAYTON	5.03%	3.31%	0.19%	1.27%	3.50%
CLINTON	3.52%	1.82%	-1.25%	-0.19%	2.01%
CRAWFORD	3.58%	1.89%	-1.19%	-0.13%	2.08%
DALLAS	4.70%	2.99%	-0.12%	0.95%	3.18%
DAVIS	6.67%	4.93%	1.76%	2.85%	5.12%
DECATUR	6.02%	4.29%	1.14%	2.22%	4.48%

Table D: Percent Change over 2017

**2018 Domestic Travel Impact on Iowa
Table D: Percent Change over 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	6.00%	4.26%	1.12%	2.20%	4.46%
DES MOINES	4.33%	2.62%	-0.47%	0.60%	2.82%
DICKINSON	5.74%	4.01%	0.87%	1.95%	4.20%
DUBUQUE	3.97%	2.27%	-0.81%	0.25%	2.47%
EMMET	6.25%	4.52%	1.36%	2.45%	4.71%
FAYETTE	8.52%	6.75%	3.53%	4.64%	6.95%
FLOYD	6.15%	4.42%	1.27%	2.36%	4.61%
FRANKLIN	6.32%	4.58%	1.42%	2.51%	4.77%
FREMONT	5.71%	3.98%	0.84%	1.92%	4.17%
GREENE	6.75%	5.01%	1.84%	2.93%	5.21%
GRUNDY	5.93%	4.19%	1.05%	2.13%	4.39%
GUTHRIE	6.09%	4.35%	1.20%	2.29%	4.55%
HAMILTON	4.94%	3.22%	0.10%	1.18%	3.41%
HANCOCK	5.23%	3.51%	0.39%	1.47%	3.70%
HARDIN	5.03%	3.31%	0.19%	1.27%	3.50%
HARRISON	5.18%	3.47%	0.34%	1.42%	3.66%
HENRY	4.52%	2.81%	-0.29%	0.78%	3.00%
HOWARD	5.07%	3.35%	0.23%	1.31%	3.54%
HUMBOLDT	4.77%	3.06%	-0.05%	1.02%	3.25%
IDA	5.23%	3.51%	0.38%	1.46%	3.70%
IOWA	5.64%	3.91%	0.78%	1.86%	4.11%
JACKSON	5.16%	3.44%	0.32%	1.40%	3.63%
JASPER	6.04%	4.31%	1.16%	2.24%	4.50%
JEFFERSON	3.46%	1.77%	-1.31%	-0.25%	1.95%
JOHNSON	4.72%	3.01%	-0.03%	0.97%	3.20%
JONES	5.89%	4.16%	1.02%	2.10%	4.36%
KEOKUK	6.52%	4.78%	1.62%	2.71%	4.98%

Table D: Percent Change over 2017

2018 Domestic Travel Impact on Iowa					
Table D: Percent Change over 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	6.56%	4.81%	1.65%	2.74%	5.01%
LEE	4.95%	3.23%	0.12%	1.19%	3.43%
LINN	6.63%	4.89%	1.72%	2.81%	5.08%
LOUISA	6.47%	4.73%	1.57%	2.66%	4.92%
LUCAS	5.57%	3.85%	0.71%	1.79%	4.04%
LYON	6.58%	4.83%	1.67%	2.76%	5.03%
MADISON	7.03%	5.28%	2.10%	3.20%	5.47%
MAHASKA	5.95%	4.22%	1.07%	2.16%	4.41%
MARION	6.12%	4.38%	1.23%	2.32%	4.58%
MARSHALL	8.84%	7.06%	3.83%	4.94%	7.26%
MILLS	4.72%	3.01%	-0.10%	0.98%	3.20%
MITCHELL	6.39%	4.65%	1.49%	2.58%	4.85%
MONONA	4.10%	2.40%	-0.69%	0.38%	2.59%
MONROE	4.76%	3.05%	-0.06%	1.02%	3.24%
MONTGOMERY	5.51%	3.79%	0.65%	1.74%	3.98%
MUSCATINE	4.59%	2.88%	-0.23%	0.84%	3.07%
O'BRIEN	5.57%	3.84%	0.71%	1.79%	4.04%
OSCEOLA	5.99%	4.26%	1.11%	2.20%	4.45%
PAGE	5.90%	4.16%	1.02%	2.10%	4.36%
PALO ALTO	4.34%	2.64%	-0.46%	0.61%	2.83%
PLYMOUTH	5.50%	3.78%	0.65%	1.73%	3.97%
POCAHONTAS	5.24%	3.52%	0.40%	1.48%	3.72%
POLK	6.73%	4.99%	1.82%	2.91%	5.18%
POTTAWATTAMIE	6.95%	5.20%	2.02%	3.12%	5.39%
POWESHIEK	8.95%	7.17%	3.93%	5.05%	7.37%
RINGGOLD	5.92%	3.54%	0.94%	2.13%	4.38%
SAC	6.28%	4.54%	1.39%	2.48%	4.74%

Table D: Percent Change over 2017

2018 Domestic Travel Impact on Iowa					
Table D: Percent Change over 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	5.60%	3.88%	0.74%	1.82%	4.07%
SHELBY	6.89%	5.14%	1.97%	3.07%	5.34%
SIOUX	6.40%	4.67%	1.51%	2.60%	4.86%
STORY	6.24%	4.51%	1.35%	2.44%	4.70%
TAMA	5.33%	3.61%	0.48%	1.56%	3.80%
TAYLOR	7.15%	5.08%	2.09%	3.32%	5.60%
UNION	6.22%	4.48%	1.33%	2.42%	4.68%
VAN BUREN	4.83%	3.12%	0.01%	1.08%	3.31%
WAPELLO	5.15%	3.43%	0.31%	1.38%	3.62%
WARREN	6.70%	4.95%	1.79%	2.88%	5.15%
WASHINGTON	5.61%	3.88%	0.75%	1.83%	4.07%
WAYNE	6.08%	4.34%	1.19%	2.28%	4.54%
WEBSTER	8.26%	6.49%	3.27%	4.38%	6.68%
WINNEBAGO	7.18%	4.97%	1.35%	3.34%	5.62%
WINNESHIEK	6.01%	4.27%	1.13%	2.21%	4.47%
WOODBURY	3.86%	2.16%	-0.92%	0.14%	2.35%
WORTH	7.35%	4.96%	1.36%	3.51%	5.79%
<u>WRIGHT</u>	<u>6.36%</u>	<u>4.62%</u>	<u>1.46%</u>	<u>2.55%</u>	<u>4.81%</u>
STATE TOTALS	5.84%	4.13%	0.96%	2.05%	4.35%

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Table E: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa					
Table E: Alphabetical by County, 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>
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 E: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa					
Table E: 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 E: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa						
Table E: 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 E: Alphabetical by County, 2017

2017 Domestic Travel Impact on Iowa					
Table E: 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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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
National Travel & Tourism Office (NTTO), U.S. Department of Commerce
U.S. Travel Association