

**ECONOMIC IMPACT OF ELKHART COUNTY'S  
TOURISM AND TRAVEL INDUSTRY - 2019 and 2021**

Prepared for:

**Elkhart County  
Convention and Visitors Bureau, Inc.**

Prepared by

**Certec Inc.**

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## EXECUTIVE SUMMARY

A detailed examination of the expenditure, employment, and tax impacts generated by Elkhart County's tourism and travel industry, as well as the industry structure, has been conducted for the Elkhart County Convention and Visitors Bureau, Inc. The major findings of the 2021 study compared to the 2019 research follow:

- The tourism and travel industry contributed over \$715 million to Elkhart County's economy in 2021 compared to \$591 million in 2019. Direct expenditures by tourists accounted for over \$486 million in 2021. Spending increased 7.0% annually. The annual real growth in spending increased 3.5%.
- The tourism industry in 2021 generated over \$168.3 million in tax revenues to government--\$61.8 million to the state, \$33.3 million locally, and \$73.1 million to the federal government. Total taxes in 2019 were \$139.1 million.
- A total of 6,731 jobs in Elkhart County resulted from the industry in 2021 compared to 6,367 in 2019. Direct expenditures created 5,101 of these jobs.
- Over one-third of the jobs created were in high wage occupations.
- The tourism-generated jobs provided nearly \$146.7 million in wages to Elkhart County workers in 2021 compared to \$121.2 million in 2019.
- Residents of Elkhart County spent an additional \$64.5 million with the local tourism industry in 2021. This direct spending created 677 jobs.
- Expenditures by category showed that food and beverage, lodging, and shopping purchases accounted for two-thirds of the dollars spent.
- Expenditures by industry sector reflected the importance of the lodging and attraction sectors to the local tourism industry. Nearly two-thirds of all direct spending continued to be from these two sectors.

## INTRODUCTION

The purpose of this study is to quantify the magnitude of the economic impact of the Elkhart County tourism and travel industry in 2021 and show any changes since 2019. Economic benefits begin when a traveler to the Elkhart area, either an Indiana resident or an out-of-state visitor, spends money in the county. The typical purchases of visitors include goods and services such as lodging, food and beverages, gasoline, souvenirs, admission fees, entertainment, or other retail goods. This initial round of spending is referred to as the direct expenditures.

These direct expenditures create a ripple-like effect through the economy. The businesses receiving these dollars use them to pay wages and salaries, to purchase goods and services for the businesses, and to pay taxes. The individuals and businesses receiving these monies, in turn, spend them on goods, services, and taxes. This process is repeated through several rounds of spending until the impact becomes insignificantly small. The combined impact of these several rounds of spending is referred to as the multiplier effect.

The total economic impact of Elkhart County tourism is the combination of the direct expenditures and the multiplier effect expressed in terms of spending, jobs, wages, and taxes. It is important to note that tourism impacts all sectors of the local economy. **Tourism remains a large, growing business in Elkhart County.** The research findings presented in this report show the importance of tourism to the local economy in 2021 and 2019. It reflects the recovery from the covid pandemic year of 2020. This is accomplished through the use of the Certec Model<sup>®</sup> designed for estimating tourism impacts at the state and local levels, in conjunction with an input-output model designed for estimating the indirect and induced effects of tourist spending. The procedures used are explained in detail in Appendix A.

**Table 1**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2019 and 2021**

	<u>2019</u>	<u>2021</u>
<b>Total Expenditures</b>	<b>\$591,168,441</b>	<b>\$715,462,319</b>
Direct Expenditures	\$401,991,324	\$486,510,485
Indirect Expenditures	\$189,177,117	\$228,951,834
 <b>Annual Change Between 2019 and 2021</b> (Direct Expenditures Only)		<b>7.0%</b>
 <b>Annual Change Between 2019 and 2021</b> (Adjusted for Inflation)		<b>3.5%</b>
 <b>Total Wages</b>	<b>\$121,186,042</b>	<b>\$146,665,553</b>
 <b>Total Taxes</b>	<b>\$139,126,529</b>	<b>\$168,378,050</b>
State	\$ 51,139,432	\$ 61,891,560
Local	\$ 27,556,818	\$ 33,350,672
Federal	\$ 60,430,279	\$ 73,135,818
 <b>Total Employment</b>	<b>6,367</b>	<b>6,731</b>
Jobs (Direct Expenditures)	4,825	5,101
Jobs (Indirect Expenditures)	1,542	1,630

## ECONOMIC IMPACT OF TOURISM

### Expenditures

The tourism and travel industry made a total contribution to Elkhart County's economy of over \$715 million in 2021 (Table 1). The purchases made by travelers while in the county accounted for over \$486 million of this total. This represents an annual increase in spending of 7.0 percent over 2019 levels. After adjusting for inflation between the two years, the annual real growth in spending increased 3.5 percent. The large increase in cost for lodging, food and fuel after the covid economic shutdown in 2020 helped to drive this increase in spending.

The difference between the total economic impact and the purchases of travelers was a result of the multiplier effect, i.e. the indirect expenditures. This was triggered by the initial infusion of dollars in the economy - the over \$486 million. These direct expenditures had a ripple-like quality as they passed from one layer of the economy to the next. The magnitude of these economic benefits diminished during each round of re-spending for goods and services until only an insignificantly small sum was left. The sum of these expenditures for the several rounds of re-spending of the initial dollars was the total multiplier effect of nearly \$229 million.

The expenditure data were further classified by type of purchase. The countywide distribution of these expenditures is provided in Chart 1. Food and beverage spending accounted for nearly 32 percent of these over \$486 million in direct purchases. Lodging accounted for over 17 percent of all travel expenditures. Attractions and shopping also collected nearly 17 percent of the total – down from over 18 percent in 2019. Expenditures on transportation amounted to over 11 percent, an increase from eight percent as a result of much higher gas prices. Six percent of the purchases were for souvenirs.

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Where does this money go once it is in the Elkhart County economy? Many hold the idea that it all goes to the service and retail sectors to support only low wage jobs. In reality, the economic benefits to Elkhart County are far more widespread. It helps support dozens of local businesses that do not directly serve the county's tourists. It impacts banking, insurance, and real estate; transportation and public utilities; construction; agriculture, and manufacturing.

### **Expenditures by Sector**

The contribution of the individual tourism sectors to the visitor expenditures vary widely. The countywide distribution of these expenditures is provided in Chart 2. Lodging guests made over 39 percent of these over \$486 million in purchases – up from 37 percent in 2019. Attraction visitors accounted for the next largest share of this spending (26 percent). Those passing through and those visiting friends and relatives in the county contributed 17 percent and 14 percent of the total spending, respectively. Campers provided over four percent of the purchases.

The importance of the interstate highway, lodging properties, and local attractions to tourism spending in Elkhart County continues to be substantial. The highway carries millions of travelers to and through the county. These interstate travelers help to hold up occupancy rates at existing lodging properties. In addition, the large volumes of pass-through travelers on the highway who stop to have meals, to buy gasoline, or shop for needed items continue to make an important contribution to the local economy. The destination visitor is, in turn, drawn to the county by the quality attractions available. The spending by destination travelers is substantial and continued to grow in importance between 2019 and 2021. After the severe downturn in 2020 the local industry rebounded dramatically in 2021.



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The pass-through highway travelers in tandem with the over 3.2 million destination travelers to Elkhart County have helped create the extensive network of attractions, lodging properties, restaurants, and specialty shopping that exists in the county. This mix of visitors has provided a balance to the local tourism industry. As a result, it is not overly dependent on a single tourism sector – a goal most communities strive for but few achieve. Elkhart County has a very healthy tourism industry.

## **Employment**

In 2021, a total of 6,731 jobs (in FTEs [full time equivalents]) in Elkhart County were due to the expenditures made in the tourism and travel industry (Table 1) – an increase of 364 jobs over 2019 totals. These continue to represent nearly six percent of all jobs in the county in 2021. The direct expenditures of travelers accounted for 5,101 of these jobs.

The employment opportunities were distributed throughout the county. A number of the jobs in the community are supported, in part, by tourism. Since tourism jobs are dispersed throughout the local economy, they are more difficult to identify than factory jobs. This contributes to the misunderstanding of the size and importance of tourism to the local economy.

The individual sectors of the industry had different impacts on the creation of employment. The guests in the lodging sector led the industry in job creation. The expenditures of the visitors within this sector generated 2,654 jobs – an increase of 306 jobs since 2019. It was followed, in turn, by the attractions sector (1,728 jobs) – an increase of 32 jobs, the pass-through sector (1,115 jobs) – an increase of 35 jobs, the VFR [visits to friends and relatives] sector (946 jobs) – a decrease of 18 jobs, and the campground sector (288 jobs).

The jobs created by tourism can be found throughout the occupational structure, not just in the service sector (Table 2). **Over one-third of the jobs resulting from tourism spending (34.4 percent) were found in the high-wage occupations of professional and technical, managerial, sales, construction, craftsman, and operatives.** Tourism produces a wide range of jobs in addition to the front-line personnel such as desk clerks, waiters, and ticket takers travelers most often observe.

**Table 2**

**TOURISM GENERATED EMPLOYMENT BY OCCUPATION**

<u>Occupation</u>	<u>Jobs</u>
Professional & technical	318
Managerial	497
Marketing & sales	633
Administrative support	764
Construction	135
Craftsman	389
Agriculture & forestry	147
Operatives & fabricators	347
Laborers	234
Personal services	3,267
<b>Total</b>	<b>6,731</b>

Tourism stimulates non-tourism industries such as agriculture, fishing, meat packing, food processing, brewing and distilling, bottling, floriculture, construction and appliance, furniture, and linen manufacture. For example, demand for hotel rooms can create demand for the services of contractors, which generates secondary demand for steel, bricks, lumber, tile, marble, glass, plumbing and air conditioning systems, elevator cars, carpets and a variety of other goods. Similarly, tourist demand for restaurant meals creates business not only for restaurants, but for producers and packagers of fresh and frozen foods, butchers, dairies, and ultimately, for manufacturers of farm implements and fertilizers. **Consequently, a healthy tourism industry means additional business for industries throughout the economy.**

## **Wages**

The expenditures of travelers are the business receipts of the establishments patronized. A portion of these revenues is used by the businesses to pay their employees. In 2021 every dollar spent by travelers in Elkhart County produced an average of 20.5 cents in wage and salary income.

The total wage and salary income generated by tourism and paid by local businesses was nearly \$146.7 million in 2021 (Table 1) -- compared to \$121.2 million in 2019. The direct purchases of travelers accounted for over \$99.7 million of this total.

## **Taxes**

Tourism generates state and local as well as federal tax revenues. Elkhart County tourism expenditures resulted in the collection of over \$168.3 million in tax revenues in 2021 (Table 1) compared to \$139.1 million in 2019. Over two-fifths (\$73.1 million) went directly to the federal government through taxes including personal and corporate income, social security, gasoline, and airline taxes.

The Indiana state treasury benefited from the addition of nearly \$61.9 million in tax revenues generated by tourism activity within the county compared to \$51.1 million in 2019. A major portion of these revenues were obtained through sales and excise taxes, and taxes on individual and corporate income.

Local government operations in Elkhart County such as the cities and towns, county government, and the Convention and Visitors Bureau also benefited from tourism in the county. County and municipal governments received over \$33.3 million in tax revenues as a result of the tourism industry compared to \$27.5 million in 2019. Property tax, business taxes, and the lodging room tax contributed to these local tax revenues.

## APPENDIX A

### DATA AND METHODS

In simplest terms the economic impact of tourism is a function of the number of visitors to the county and how much they spend while there. The research challenge is to accurately measure these quantities. A number of factors contribute to the complexity of this type of economic analysis. Among these factors are:

- the distribution of tourism attractions and industry infrastructure in the county;
- the type of lodging facilities visitors use since this choice greatly impacts level of spending;
- the length of time the tourist spends in the county;
- the size of the travel party, and
- the reason for visiting the county.

These are a few of the critical factors affecting the spending patterns of visitors. **Only the spending of non-Elkhart County residents is included in this research. Locals contributed an additional \$64.5 million in direct spending to the local tourism industry in 2021 and generated 677 jobs in 2021.**

#### **Bottom-up vs. Top-down Measurement**

The Certec approach to this research challenge is based on information collected directly from tourists and tourism businesses (bottom-up measurement) as opposed to a procedure that relies on the extraction of information from business data which was initially collected for a purpose other than the analysis of the tourism industry (top-down measurement).

It is the Certec position that tourism economic impact begins with the purchase of goods and services by tourists. Therefore, to most accurately measure the sum of these economic transactions requires data collected from both tourists and tourism businesses that answer questions directly related to the research task at hand.

The Certec Model© was developed in the 1970s, and updated annually, to measure the direct tourism economic impacts at the state and local levels. The data required as inputs include the spending pattern of visitors, in great detail, and business data such as rooms sold at lodging facilities and the number of visitors to attractions.

**Expenditure Data**

The information on the spending pattern of travelers to Elkhart County is currently available for 2019 and 2021 through the research of Certec Inc. This research provides very detailed information on the spending of visitors to the area.

The expenditures per person per day in 2019 and 2021 were calculated. They are, by sector:

	<b>2019</b>	<b>2021</b>
lodging	\$122.80	\$158.96
attractions	\$58.85	\$67.74
VFR	\$71.68	\$80.26
pass through	\$40.66	\$47.55
campground	\$58.59	\$68.63

## Participant Days

Elkhart County is divided into tourism sectors. Tourism and travel businesses operating in 2021 were identified by Certec from a review of local tourism publications as well as several individual business brochures. This information was used to update the 2019 database developed for the previous year's study.

Certec designed surveys to collect business data from a stratified random sample of these businesses. The questionnaires are available in Appendix D. The information was collected through the Elkhart County Convention and Visitors Bureau, Inc. with the assistance of Jon Hunsberger, Executive Director. Mail interviews were received from the owner and/or manager of each of those establishments during the period March through May 2021. The interview had as its primary focus the number of units sold (rooms or campsites) or visitors to the facility. Complete interviews were obtained from 53.6 percent of the businesses in the sample.

Once the processing of these data sets was complete, participant days by type of business were determined. The results of this analysis are presented in Chart 3. Total participant days to Elkhart County in 2021 exceeded 5.9 million versus nearly 5.9 million in 2019. Attraction visitors, after adjusting for multiple visits, accounted for nearly 32 percent of all visitor days followed by pass-through visitors (nearly 29 percent). The lodging and VFR sectors also provided a substantial number of participant days—20 percent and 14 percent, respectively. Campground visitors accounted for nearly 5 percent of the total.

**Destination travelers to Elkhart County totaled over 3.2 million persons (3,249,962) compared to 3.2 million (3,224,160) in 2019— an annual growth of 0.4 percent. In addition, over 1.7 million pass-through travelers visited the county (1,707,189) compared to 1,690,286 in 2019.**

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The information on participant days in Chart 3 in combination with the expenditure data in Chart 2 continues to show the importance of lodging guests and their much higher spending per person per day. Even though they account for less than two-thirds as many visitors to the county as does the attractions sector, the total impact of lodging guests on the local economy is 34 percent greater than that of attraction visitors.

### **Direct Effects**

Once the basic inputs to the Model were calculated, several statistical analyses were conducted using the equations of the Certec Model<sup>®</sup>. Note that the Model was modified for use in this project to reflect the Elkhart County tourism industry. This Model was designed to provide expenditure estimates at the sub-state (county) level for each of the industry sectors. These sub-state estimates by sector were combined to provide expenditure levels for the entire industry within the county.

### **Multiplier Effects**

The indirect and induced expenditures resulting from the initial infusion of money into the Elkhart County economy were calculated using the RIMS II input-output (I-O) model developed by the U.S. Department of Commerce, Bureau of Economic Analysis. The output from the Certec Model<sup>®</sup> served as data input for the I-O model. The latter model provided indirect expenditures resulting from the tourism industry.

The tax revenues resulting from this industry were also estimated. State and local tax revenues as well as federal tax revenues were obtained by using sector output generated by the Certec Model<sup>®</sup> with expenditure/tax relationships derived from I-O analysis.

Estimates of tourism and travel industry employment were generated in a similar fashion. Sector output from the Certec Model© was applied to expenditure/job relationships obtained from the I-O analysis. Employment generated by direct and indirect expenditures was obtained. The I-O model relationships also allocated the total employment generated to the occupation providing the service or product.

The addition of the indirect effects, as determined from the I-O model, to the direct effects, as determined from the Certec Model®, provided the complete picture of the economic impact of Elkhart County's tourism and travel industry presented in this report.

## APPENDIX B

### DEFINITION OF TERMS

<b>Direct Expenditure</b>	the exchange of money or the promise of money for goods or services while traveling in Elkhart County, including any advance purchase of public transportation, tickets, lodging or other items normally considered an incident of travel, but which may be purchased in advance of the trip.
<b>Indirect Expenditure</b>	the second and subsequent rounds of spending of the travel dollars (direct expenditures) in Indiana for Indiana-produced goods and services.
<b>Input-Output (I-O) Model</b>	an economic analysis method which is designed to measure the indirect and induced effects of a direct change in a region's economy.
<b>Participant Day</b>	an individual spending one day or part of a day at a tourism or travel facility -- for example, three visitors spending one day is equivalent to one visitor spending three days.
<b>Travel and Tourism Industry</b>	the tourism industry consists of all those firms, organizations and facilities (including accommodations, food, transportation, and related services) which are intended to serve the specific needs and wants of travelers.
<b>VFR</b>	Visit to friends or relatives.

## APPENDIX C

### Findings From Visitor Survey

The visitor survey results presented below should be interpreted with caution. They are based on a research sample that has  $\pm 10$  percent sampling variability. Had the purpose of this survey been to document the county's market, instead of measuring visitor spending, a much larger sample of visitors would have been obtained.

Elkhart County derives a substantial portion of its visitation from four states. These states accounted for over three-fifths of the visitors to the county. It also receives visitation from a number of other states, particularly those within a day's drive of Elkhart County.

The strongest state markets for the area are, in rank order:

1)	Indiana	26%
2)	Michigan	17
3)	Ohio	12
4)	Illinois	8

While these findings indicate that the county's strongest draw among travelers comes from Indiana and nearby states, the county does receive visitation from more distant locations such as Pennsylvania, Iowa, California, Wisconsin, Kentucky, Missouri, and North Carolina. In all, visitors from twenty-five different states were identified in a sample of one hundred travel parties.

## Demographics

The typical visitor to the Elkhart area is most likely to be a college graduate (72.5 percent). An additional one in six has graduated high school (15.3 percent). One-third of the Elkhart visitor is working in a professional job (33.7 percent). Two-fifths of the visitors surveyed are retired.

### DEMOGRAPHICS OF VISITORS TO ELKHART COUNTY

#### EDUCATION

College Graduate	43.9%
Post-Graduate	28.6
High School Graduate	15.3
Some College	11.2
Some High School	1.0

#### OCCUPATION

Retired	40.8%
Professional	33.7
Managerial	7.1
Sales	6.1
Craftsman	3.1
Personal Service	3.1
Laborer	3.1
Operative, incl. Transport	2.0
Clerical	1.0

## Information Sources

Travelers to the Elkhart County area use a variety of information sources when planning a trip. The source most often used is the Internet (85%). Other sources include:

Friends/Relatives	44%
Local Visitors Bureau	15

Magazines	11
Newspapers	4
Travel Agent	4
Auto Club	4
State Tourism Office	3

### **Trip Characteristics**

The destination tourism business Elkhart County enjoys is derived primarily from visitors on either a short trip (66%) of one to three nights in length or on a vacation (16%). Over eight out of ten of the visitors interviewed were on one of these two trip types. An additional 10% were on a convention or business trip. Over nine in ten of those who spent the night stayed in motels (90.2%). Nationally, pleasure travel accounted for over 80 percent of the one billion plus trips in 2020. The remainder results from business travel.

Over two-fifths of these travelers to Elkhart County (42%) are on their first visit to the county. This ranges from nearly two out of five for motel guests to three out of five attraction visitors. Overall, visitors have taken an average of 3.3 trips to the area in the past two years. The typical travel party has an average of 2.5 people. The average length of stay is 2.1 days.

Travelers visited a number of attractions in the Elkhart County area. On average a travel party visited 2.3 attractions. The most visited attractions by those interviewed were:

- Das Dutchman Essenhaus
- Quilt Shops/Quilt Shows/Gardens
- Amish Sites (general)

- Shippshewana
- Local Restaurants
- RV/MH Hall of Fame
- Barns at Nappanee
- Blue Gate Restaurant & Theatre
- Notre Dame Concert
- Wellfield Botanic Gardens
- Performing Arts Center
- Local Parks/Lakes
- Museums (general)
- Wakarusa Dime Store

The most frequently mentioned activities that visitors participate in while in Elkhart County are shopping (45 percent), dining (36 percent), music/theatre (33 percent), visiting friends or relatives (10 percent), biking/hiking (8 percent), swimming (5 percent), and mini-golf (2 percent). On average a travel party participated in 1.7 activities.

**APPENDIX D**

**Business Questionnaires**



Office Use Only  
County \_\_\_\_\_  
Interview \_\_\_\_\_  
INCVB21

**INDIANA HOTEL/MOTEL QUESTIONNAIRE**

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **May 1, 2022**.

- 1. Number of rooms sold during entire year - 2021. \_\_\_\_\_
- 2. Average number of guests per room - 2021. \_\_\_\_\_
- 3. Estimated proportion of guests from outside Elkhart Co.-2021
- 4. Number of rooms at facility at beginning of 2021. \_\_\_\_\_

NOTE: Certec Inc. is collecting this type of information from a sample of lodging properties in counties across Indiana from the Ohio River in the south to Lake Michigan in the north. The data from all lodging properties in the sample are combined within each county. No information will be released in any way that would permit the identification of your business. All individual business information will remain confidential.

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**INDIANA BED & BREAKFAST QUESTIONNAIRE**

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **May 1, 2022**.

- 1. Number of rooms sold during entire year - 2021. \_\_\_\_\_
- 2. Average number of guests per room - 2021. \_\_\_\_\_
- 3. Estimated proportion of guests from outside Elkhart Co.-2021
- 4. Number of rooms at facility at beginning of 2021. \_\_\_\_\_

NOTE: Certec Inc. is collecting this type of information from a sample of lodging properties in counties across Indiana from the Ohio River in the south to Lake Michigan in the north. The data from all lodging properties in the sample are combined within each county. No information will be released in any way that would permit the identification of your business. All individual business information will remain confidential.

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### INDIANA ATTRACTION QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **May 1, 2022**.

1. Number of visitors to attraction during entire year-2021 \_\_\_\_\_
2. Estimated proportion of visitors from outside Elkhart Co.-  
2021 \_\_\_\_\_

NOTE: Certec Inc. is collecting this type of information from a sample of attractions in counties across Indiana from the Ohio River in the south to Lake Michigan in the north. The data from all attractions in the sample are combined within each county. No information will be released in any way that would permit the identification of your business. All individual business information will remain confidential.

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### INDIANA CAMPGROUND QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **May 1, 2022**.

1. Number of camper nights sold during entire year - 2021. \_\_\_\_\_
2. Average number of campers per site - 2021. \_\_\_\_\_
3. Estimated proportion of campers from outside Elkhart Co.-2021
4. Number of improved sites at facility at beginning of 2021. \_\_\_\_

NOTES: 1-a camper night is defined as the rental of one campsite for one night. For example, one campsite rented for three(3)nights equals three (3) camper nights.

2- Certec Inc. is collecting this type of information from a sample of campgrounds in counties across Indiana from the Ohio River in the south to Lake Michigan in the north. The data from all campgrounds in the sample are combined within each county. No information will be released in any way that would permit the identification of your business. All individual business information will remain confidential.

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County  
Interview

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**ELKHART COUNTY STORE/SHOP/RESTAURANT QUESTIONNAIRE**

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **May 21, 2021**.

1. Number of visitors to business during entire year-2021 \_\_\_\_\_
2. Estimated proportion of visitors from outside Elkhart Co.-  
2021 \_\_\_\_\_

NOTE: Certec Inc. is collecting this type of information from a sample of attractions in counties across Indiana from the Ohio River in the south to Lake Michigan in the north. The data from all attractions in the sample are combined within each county. No information will be released in any way that would permit the identification of your business. All individual business information will remain confidential.

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**APPENDIX E**

**Visitor Questionnaire**

## Elkhart County Tourism Questionnaire

Thank you for taking the few minutes needed to answer the following questions concerning your trip to Elkhart County. **Please complete the questionnaire and return it to the research personnel.** The questionnaire is confidential. Nowhere are you asked to identify yourself. Any demographic questions are for statistical purposes only. **Please circle the number for the response you select for an individual question unless the question asks that you write in your answer.**

1. Let us begin by asking the **zip code for your residence?** \_\_\_\_\_
  
2. **How many visits** have you made to Elkhart County in the past two years?
  1. First Visit
  2. \_\_\_\_\_ [record total number of visits if more than one]
  3. Local resident of Elkhart County
  
3. Please classify the **type of trip** you are taking.
  1. Day trip
  2. Short trip (less than 4 days with at least one overnight stay)
  3. Vacation (4 days or more)
  4. Business/convention trip
  5. Other, specify \_\_\_\_\_
  
4. What **type of overnight accommodations** will your travel party use while in Elkhart County?
  1. Hotel or motel
  2. Bed & breakfast
  3. Home of friends or relatives
  4. Campground
  5. Other, specify \_\_\_\_\_
  6. No overnight stay - Go to Question 6.
  
5. **How many nights** will you spend in Elkhart County on this trip? \_\_\_\_
  
6. Including yourself, the **number of people in your immediate travel party** is \_\_\_\_
  
7. What **attractions or sights** are you going to visit or participate in while in this area of Indiana while on this trip.
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

8. What **activities** other than sightseeing will you participate in while in this area?
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
9. Which information sources are you most likely to use when making travel plans?  
**(Circle all that apply)**
- |                             |                         |
|-----------------------------|-------------------------|
| 1. A local visitors' bureau | 6. Internet             |
| 2. A travel agent           | 7. Friends or relatives |
| 3. An auto club             | 8. State tourism office |
| 4. Newspaper                | 9. Other _____          |
| 5. Magazine                 |                         |

**The next section asks for expenditures made in Elkhart County while on this trip to the area.** The county stretches from east of Elkhart (on US-20) to Middlebury in the northern part of the county to Goshen in the county's center to Nappanee in the southern part of the county.

10. Please provide the **total expenditures** that your travel party has made or will make in Elkhart County on this trip for each of the following categories:
- \$ \_\_\_\_\_ Lodging
  - \$ \_\_\_\_\_ Restaurant meals
  - \$ \_\_\_\_\_ Groceries including any soft drinks
  - \$ \_\_\_\_\_ Alcoholic beverages
  - \$ \_\_\_\_\_ Gasoline and other service station expenses
  - \$ \_\_\_\_\_ Local attractions (admissions & other fees)
  - \$ \_\_\_\_\_ Souvenirs
  - \$ \_\_\_\_\_ Shopping
  - \$ \_\_\_\_\_ All other expenditures
11. Indicate the highest grade or year of school completed by the head of your household.....(Check only **ONE**)
- |                         |                                  |
|-------------------------|----------------------------------|
| 1. Some high school     | 4. College graduate              |
| 2. High school graduate | 5. College post-graduate studies |
| 3. Some college         |                                  |
12. What is the occupation of the head of your household? \_\_\_\_\_

**Thank you for assisting us with this important project. Your response is appreciated and will be most helpful.**

**Certec Inc.  
Versailles, KY**



## **APPENDIX F**

### **Economic Impact Data Tables (Time Series)**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2017 and 2019**

	<u>2017</u>	<u>2019</u>
<b>Total Expenditures</b>	<b>\$549,968,357</b>	<b>\$591,168,441</b>
Direct Expenditures	\$373,975,491	\$401,991,324
Indirect Expenditures	\$175,992,866	\$189,177,117
 <b>Annual Change Between 2017 and 2019</b> (Direct Expenditures Only)		<b>3.7%</b>
 <b>Annual Change Between 2017 and 2019</b> (Adjusted for Inflation)		<b>1.6%</b>
 <b>Total Wages</b>	 <b>\$112,740,268</b>	 <b>\$121,186,042</b>
 <b>Total Taxes</b>	 <b>\$129,430,435</b>	 <b>\$139,126,529</b>
State	\$ 47,575,391	\$ 51,139,432
Local	\$ 25,636,311	\$ 27,556,818
Federal	\$ 56,218,733	\$ 60,430,279
 <b>Total Employment</b>	 <b>6,223</b>	 <b>6,367</b>
Jobs (Direct Expenditures)	4,716	4,825
Jobs (Indirect Expenditures)	1,507	1,542

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2015 and 2017**

	<u>2015</u>	<u>2017</u>
<b>Total Expenditures</b>	<b>\$488,433,402</b>	<b>\$549,968,357</b>
Direct Expenditures	\$332,132,056	\$373,975,491
Indirect Expenditures	\$156,301,346	\$175,992,866
 <b>Annual Change Between 2015 and 2017</b> (Direct Expenditures Only)		<b>6.3%</b>
 <b>Annual Change Between 2015 and 2017</b> (Adjusted for Inflation)		<b>3.0%</b>
 <b>Total Wages</b>	 <b>\$100,125,965</b>	 <b>\$112,740,268</b>
 <b>Total Taxes</b>	 <b>\$114,948,700</b>	 <b>\$129,430,435</b>
State	\$ 42,252,267	\$ 47,575,391
Local	\$ 22,767,911	\$ 25,636,311
Federal	\$ 49,928,522	\$ 56,218,733
 <b>Total Employment</b>	 <b>5,864</b>	 <b>6,223</b>
Jobs (Direct Expenditures)	4,444	4,716
Jobs (Indirect Expenditures)	1,420	1,507

**Certec Inc.  
Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2013 and 2015**

	<u>2013</u>	<u>2015</u>
<b>Total Expenditures</b>	<b>\$431,926,159</b>	<b>\$488,433,402</b>
Direct Expenditures	\$293,707,439	\$332,132,056
Indirect Expenditures	\$138,218,720	\$156,301,346
 <b>Annual Change Between 2013 and 2015</b> (Direct Expenditures Only)		<b>6.5%</b>
 <b>Annual Change Between 2013 and 2015</b> (Adjusted for Inflation)		<b>5.4%</b>
 <b>Total Wages</b>	 <b>\$ 89,665,322</b>	 <b>\$100,125,965</b>
 <b>Total Taxes</b>	 <b>\$101,378,082</b>	 <b>\$114,948,700</b>
State	\$ 37,364,069	\$ 42,252,267
Local	\$ 20,133,874	\$ 22,767,911
Federal	\$ 43,880,139	\$ 49,928,522
 <b>Total Employment</b>	 <b>5,501</b>	 <b>5,864</b>
Jobs (Direct Expenditures)	4,169	4,444
Jobs (Indirect Expenditures)	1,332	1,420

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Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2011 and 2013**

	<u>2011</u>	<u>2013</u>
<b>Total Expenditures</b>	<b>\$401,566,418</b>	<b>\$431,926,159</b>
Direct Expenditures	\$273,062,980	\$293,707,439
Indirect Expenditures	\$128,503,438	\$138,218,720
 <b>Annual Change Between 2011 and 2013</b> (Direct Expenditures Only)		<b>3.8%</b>
 <b>Annual Change Between 2011 and 2013</b> (Adjusted for Inflation)		<b>1.8%</b>
 <b>Total Wages</b>	<b>\$ 83,362,819</b>	<b>\$ 89,665,322</b>
 <b>Total Taxes</b>	<b>\$ 94,505,285</b>	<b>\$101,378,082</b>
State	\$ 34,737,779	\$ 37,364,069
Local	\$ 18,718,679	\$ 20,133,874
Federal	\$ 41,048,827	\$ 43,880,139
 <b>Total Employment</b>	<b>5,426</b>	<b>5,501</b>
Jobs (Direct Expenditures)	4,112	4,169
Jobs (Indirect Expenditures)	1,314	1,332

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2009 and 2011**

	<u>2009</u>	<u>2011</u>
<b>Total Expenditures</b>	<b>\$367,642,103</b>	<b>\$401,566,418</b>
Direct Expenditures	\$249,994,630	\$273,062,980
Indirect Expenditures	\$117,647,473	\$128,503,438
 <b>Annual Change Between 2009 and 2011</b> (Direct Expenditures Only)		<b>4.6%</b>
 <b>Annual Change Between 2009 and 2011</b> (Adjusted for Inflation)		<b>1.6%</b>
 <b>Total Wages</b>	 <b>\$ 78,158,542</b>	 <b>\$ 83,362,819</b>
 <b>Total Taxes</b>	 <b>\$ 87,844,994</b>	 <b>\$ 94,505,285</b>
State	\$ 31,803,133	\$ 34,737,779
Local	\$ 17,137,326	\$ 18,718,679
Federal	\$ 38,904,535	\$ 41,048,827
 <b>Total Employment</b>	 <b>5,266</b>	 <b>5,426</b>
Jobs (Direct Expenditures)	3,991	4,112
Jobs (Indirect Expenditures)	1,275	1,314

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Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2007 and 2009**

	<u>2007</u>	<u>2009</u>
<b>Total Expenditures</b>	<b>\$358,631,426</b>	<b>\$367,642,103</b>
Direct Expenditures	\$243,867,419	\$249,994,630
Indirect Expenditures	\$114,764,007	\$117,647,473
 <b>Annual Change Between 2007 and 2009</b> (Direct Expenditures Only)		<b>1.3%</b>
 <b>Annual Change Between 2007 and 2009</b> (Adjusted for Inflation)		<b>0.0%</b>
 <b>Total Wages</b>	<b>\$ 76,242,925</b>	<b>\$ 78,158,542</b>
 <b>Total Taxes</b>	<b>\$ 85,691,968</b>	<b>\$ 87,844,994</b>
State	\$ 31,023,658	\$ 31,803,133
Local	\$ 16,717,301	\$ 17,137,326
Federal	\$ 37,951,009	\$ 38,904,535
 <b>Total Employment</b>	<b>5,239</b>	<b>5,266</b>
Jobs (Direct Expenditures)	3,971	3,991
Jobs (Indirect Expenditures)	1,268	1,275

**Certec Inc.  
Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2005 and 2007**

	<u>2005</u>	<u>2007</u>
<b>Total Expenditures</b>	<b>\$326,916,886</b>	<b>\$358,631,426</b>
Direct Expenditures	\$221,548,446	\$243,867,419
Indirect Expenditures	\$105,368,441	\$114,764,007
 <b>Annual Change Between 2005 and 2007</b> (Direct Expenditures Only)		<b>5.0%</b>
 <b>Annual Change Between 2005 and 2007</b> (Adjusted for Inflation)		<b>1.7%</b>
 <b>Total Wages</b>	<b>\$ 69,827,518</b>	<b>\$ 76,242,925</b>
 <b>Total Taxes</b>	<b>\$ 78,114,045</b>	<b>\$ 85,691,968</b>
State	\$ 28,280,170	\$ 31,023,658
Local	\$ 15,238,955	\$ 16,717,301
Federal	\$ 34,594,921	\$ 37,951,009
 <b>Total Employment</b>	<b>4,915</b>	<b>5,239</b>
Jobs (Direct Expenditures)	3,715	3,971
Jobs (Indirect Expenditures)	1,200	1,268



**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2003 and 2005**

	<u>2003</u>	<u>2005</u>
<b>Total Expenditures</b>	<b>\$301,128,838</b>	<b>\$326,916,886</b>
Direct Expenditures	\$204,072,132	\$221,548,446
Indirect Expenditures	\$ 97,056,706	\$105,368,441
 <b>Annual Change Between 2003 and 2005</b> (Direct Expenditures Only)		<b>4.3%</b>
 <b>Annual Change Between 2003 and 2005</b> (Adjusted for Inflation)		<b>1.4%</b>
 <b>Total Wages</b>	<b>\$ 65,776,806</b>	<b>\$ 69,827,518</b>
 <b>Total Taxes</b>	<b>\$ 71,952,208</b>	<b>\$ 78,114,045</b>
State	\$ 26,049,358	\$ 28,280,170
Local	\$ 14,036,866	\$ 15,238,955
Federal	\$ 31,865,984	\$ 34,594,921
 <b>Total Employment</b>	<b>4,663</b>	<b>4,915</b>
Jobs (Direct Expenditures)	3,525	3,715
Jobs (Indirect Expenditures)	1,138	1,200

**Certec Inc.  
Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 2000 and 2003**

	<u>2000</u>	<u>2003</u>
<b>Total Expenditures</b>	<b>\$272,567,585</b>	<b>\$301,128,838</b>
Direct Expenditures	\$182,258,499	\$204,072,132
Indirect Expenditures	\$ 90,309,086	\$ 97,056,706
 <b>Annual Change Between 2000 and 2003</b> (Direct Expenditures Only)		<b>4.0%</b>
 <b>Annual Change Between 2000 and 2003</b> (Adjusted for Inflation)		<b>1.3%</b>
 <b>Total Wages</b>	<b>\$ 62,811,493</b>	<b>\$ 65,776,806</b>
 <b>Total Taxes</b>	<b>\$ 67,899,748</b>	<b>\$ 71,952,208</b>
State	\$ 23,578,646	\$ 26,049,358
Local	\$ 12,705,508	\$ 14,036,866
Federal	\$ 31,615,594	\$ 31,865,984
 <b>Total Employment</b>	<b>4,530</b>	<b>4,663</b>
Jobs (Direct Expenditures)	3,390	3,525
Jobs (Indirect Expenditures)	1,140	1,138

**Certec Inc.  
Versailles, KY**

**ELKHART COUNTY'S TOURISM AND  
TRAVEL INDUSTRY ECONOMIC IMPACT - 1998 and 2000**

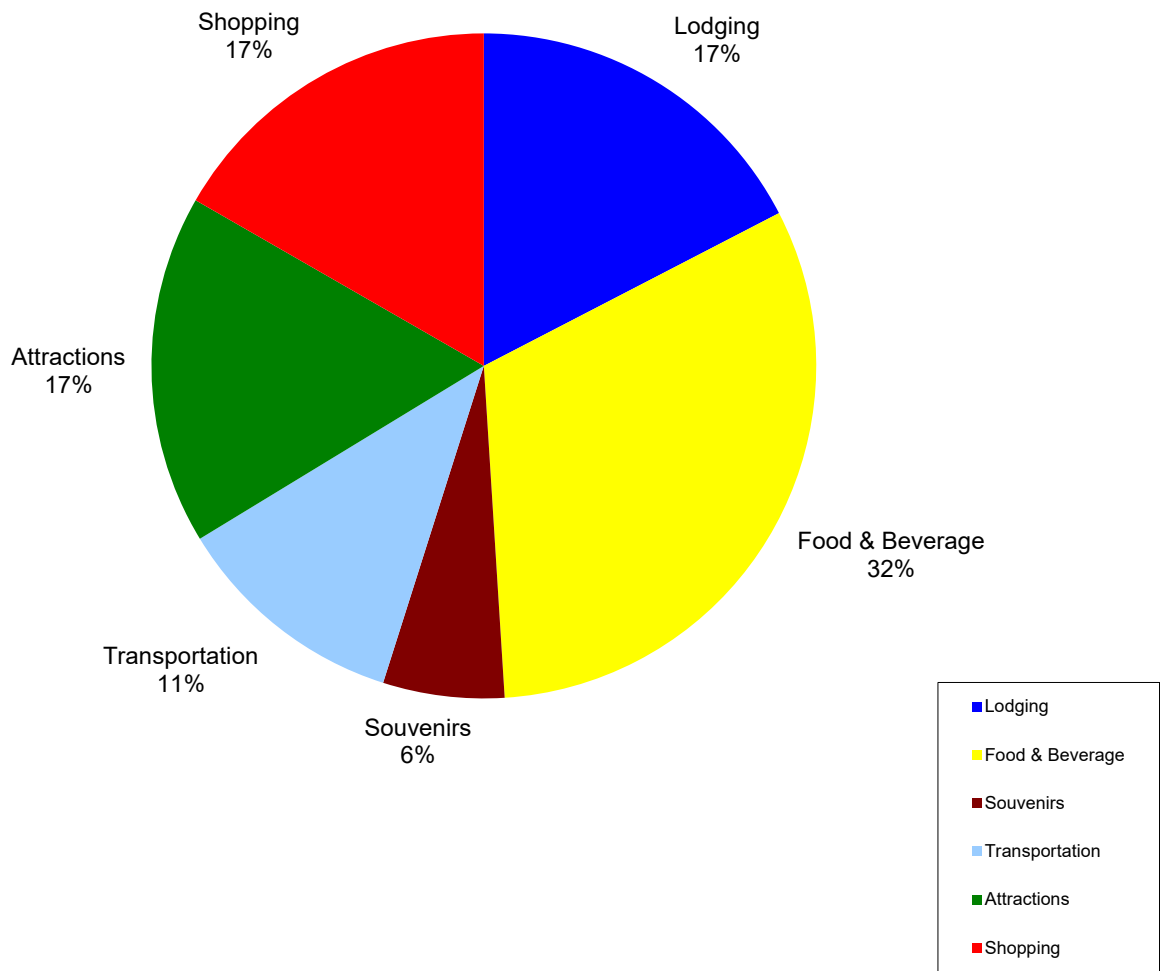
	<u>1998</u>	<u>2000</u>
<b>Total Expenditures</b>	<b>\$236,724,937</b>	<b>\$272,567,585</b>
Direct Expenditures	\$158,291,499	\$182,258,499
Indirect Expenditures	\$ 78,433,438	\$ 90,309,086
 <b>Annual Change Between 1998 and 2000</b> (Direct Expenditures Only)		<b>7.5%</b>
 <b>Annual Change Between 1998 and 2000</b> (Adjusted for Inflation)		<b>4.6%</b>
 <b>Total Wages</b>	<b>\$ 54,575,451</b>	<b>\$ 62,811,493</b>
 <b>Total Taxes</b>	<b>\$ 58,970,929</b>	<b>\$ 67,899,748</b>
State	\$ 20,478,054	\$ 23,578,646
Local	\$ 11,034,733	\$ 12,705,508
Federal	\$ 27,458,142	\$ 31,615,594
 <b>Total Employment</b>	<b>4,187</b>	<b>4,530</b>
Jobs (Direct Expenditures)	3,133	3,390
Jobs (Indirect Expenditures)	1,054	1,140

**Certec Inc.  
Versailles, KY**



Chart 1

### Travel Expenditures by Category

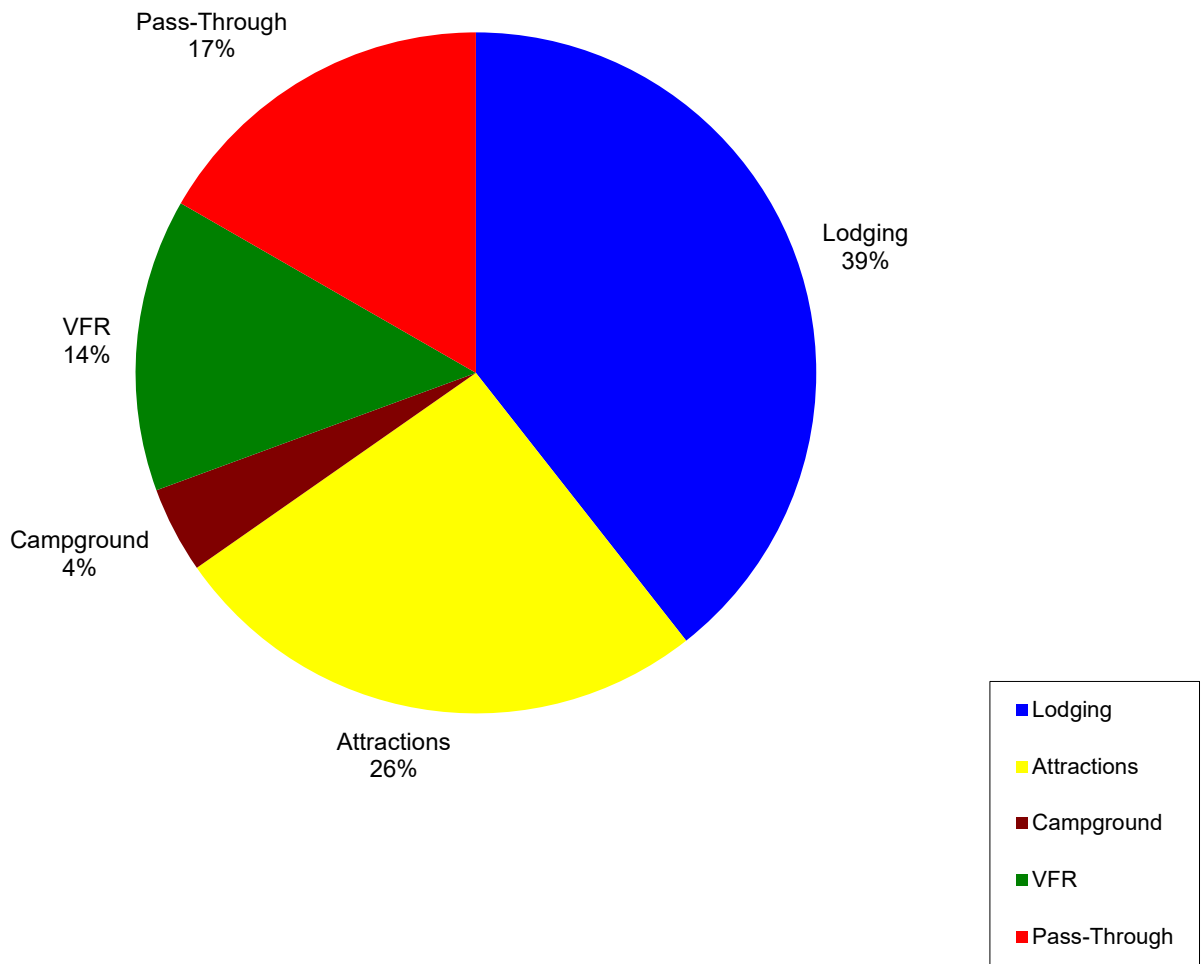


Total Expenditures = \$486,510,485

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Versailles, KY

Chart 2

### Travel Expenditures by Industry Sector

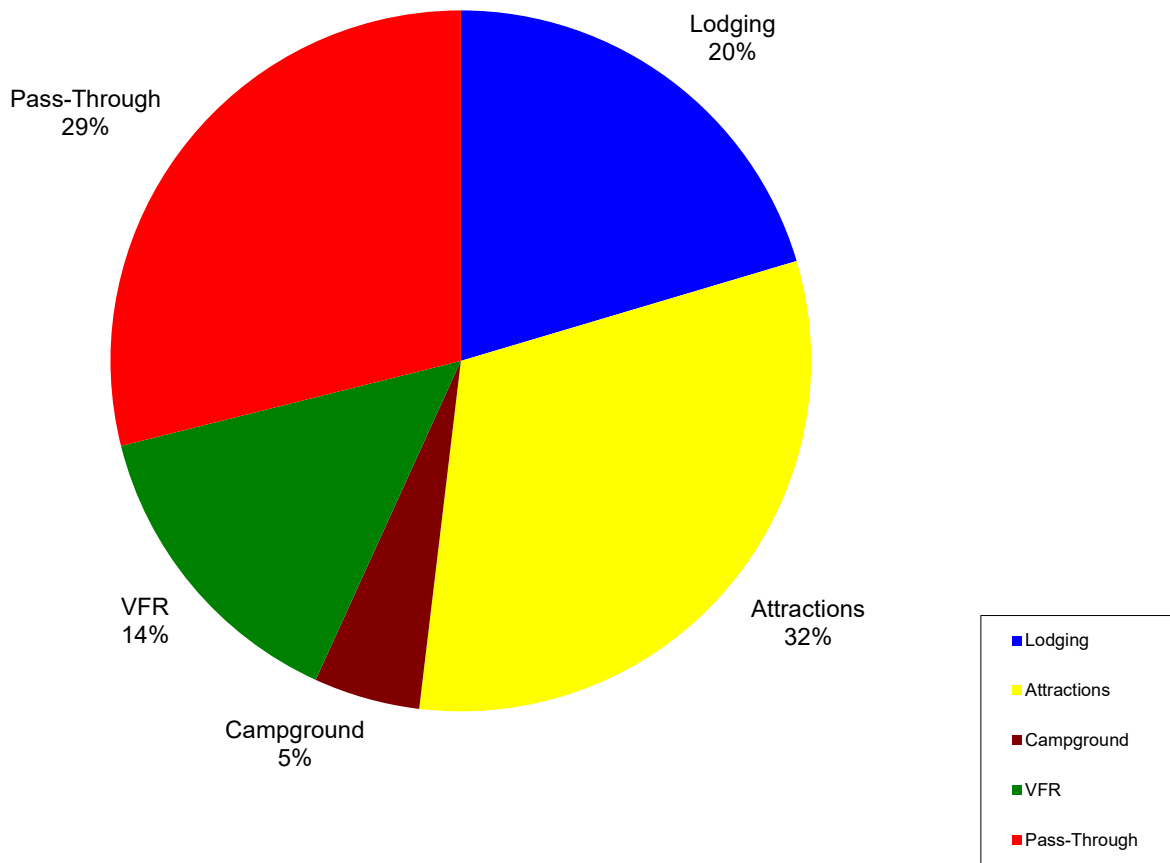


Total Expenditures = \$486,510,485

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Versailles, KY

Chart 3

Total Participant Days -- 2021



Total Participant Days = 5,906,172

Lodging	17.4
Food & Beverage	31.6
Souvenirs	5.9
Transportation	11.4
Attractions	17
Shopping	16.7

Lodging	39.4
Attractions	25.9
Campground	4.1
VFR	13.9
Pass-Through	16.7

Lodging	20.4
Attractions	31.5
Campground	4.9
VFR	14.3
Pass-Through	28.9