

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

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 2017 study compared to the 2015 research follow:

- The tourism and travel industry contributed nearly \$550 million to Elkhart County's economy in 2017 compared to \$488.4 million in 2015. Direct expenditures by tourists accounted for nearly \$374 million of this total in 2017. Spending increased 6.3 percent annually. After adjusting for inflation between the two years, the annual real growth in spending increased 3.0 percent.
- The tourism industry in 2017 generated over \$129.4 million in tax revenues to government--\$47.6 million to the state, \$25.6 million locally, and \$56.2 million to the federal government. Total taxes in 2015 were \$114.9 million.
- A total of 6,223 jobs in Elkhart County resulted from the industry in 2017 compared to 5,864 in 2015. Direct expenditures created 4,716 of these jobs.
- Over one-third of the jobs created were in high wage occupations.
- The tourism-generated jobs provided over \$112.7 million in wages to Elkhart County workers in 2017 compared to \$100.1 million in 2015.
- Residents of Elkhart County spent an additional \$54.1 million with the local tourism industry in 2017. This direct spending created 682 jobs.
- Expenditures by category showed that food and beverage, shopping, and attractions purchases accounted for over seven out of every ten dollars spent.
- Expenditures by industry sector reflected the importance of the lodging and attraction sectors to the local tourism industry. Over three-fifths 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 2017 and show any changes since 2015. 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 2017 and 2015. This is accomplished through the use of the Certec Model[®] 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 - 2015 and 2017**

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

ECONOMIC IMPACT OF TOURISM

Expenditures

The tourism and travel industry made a total contribution to Elkhart County's economy of nearly \$550 million in 2017 (Table 1). The purchases made by travelers while in the county accounted for nearly \$374 million of this total. This represents an annual increase in spending of 6.3 percent over 2015 levels. After adjusting for inflation between the two years, the annual real growth in spending increased 3.0 percent.

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 nearly \$374 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 \$176 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 33 percent of these nearly \$374 million in direct purchases – down from 34 percent in 2015. Attractions accounted for over 18 percent of all travel expenditures. Shopping and lodging collected 19 percent and 15 percent of the total, respectively – same as in 2015. Expenditures on transportation amounted to over nine percent, an increase from seven percent as a result of much higher gas prices. Six percent of the purchases were for souvenirs.

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 36 percent of these nearly \$374 million in purchases – up from 35 percent in 2015. Attraction visitors accounted for the next largest share of this spending (27 percent). Those passing through and those visiting friends and relatives in the county contributed 18 percent and 15 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 2015 and 2017.

The pass-through highway travelers in tandem with the over 3.1 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 continues to have a very healthy tourism industry.

Employment

In 2017, a total of 6,223 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 359 jobs over 2015 totals. These represent six percent of all jobs in the county in 2017. The direct expenditures of travelers accounted for 4,716 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 2,241 jobs – an increase of 161 jobs since 2015. It was followed, in turn, by the attractions sector (1,669 jobs) – an increase of 139 jobs, the pass-through sector (1,084 jobs), the VFR [visits to friends and relatives] sector (952 jobs), and the campground sector (277 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 (34.7 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	296
Managerial	470
Marketing & sales	585
Administrative support	706
Construction	123
Craftsman	364
Agriculture & forestry	133
Operatives & fabricators	321
Laborers	210
Personal services	3,015
Total	6,223

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 2017 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 over \$112.7 million in 2017 (Table 1) -- compared to \$100.1 million in 2015. The direct purchases of travelers accounted for over \$76.7 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 \$129.4 million in tax revenues in 2017 (Table 1) compared to \$114.9 million in 2015. Over two-fifths (\$56.2 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 over \$47.5 million in tax revenues generated by tourism activity within the county compared to \$42.2 million in 2015. 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 \$25.6 million in tax revenues as a result of the tourism industry compared to \$22.8 million in 2015. 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 \$54.1 million in direct spending to the local tourism industry in 2017 and generated 682 jobs in 2017.**

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 2015 and 2017 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 2015 and 2017 were calculated. They are, by sector:

	2015	2017
lodging	\$102.87	\$117.55
attractions	\$51.31	\$55.71
VFR	\$63.62	\$67.84
pass through	\$35.57	\$39.01
campground	\$52.06	\$55.99

Participant Days

Elkhart County is divided into tourism sectors. Tourism and travel businesses operating in 2017 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 2015 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 Diana Lawson, FCDME, Executive Director. Mail interviews were received from the owner and/or manager of each of those establishments during the period February through April 2018. 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 64.5 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 2017 approached 5.8 million versus 5.6 million in 2015. Attraction visitors, after adjusting for multiple visits, accounted for over 31 percent of all visitor days followed by pass-through visitors (over 29 percent). The lodging and VFR sectors also provided a substantial number of participant days—20 percent and 15 percent, respectively—same as in 2015. Campground visitors accounted for 5 percent of the total.

Destination travelers to Elkhart County totaled nearly 3.2 million persons (3,160,186) compared to 3.05 million (3,056,183) in 2015—an annual growth of 1.7 percent. In addition, over 1.66 million pass-through travelers visited the county (1,681,877) compared to 1,665,225 in 2015.

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 just 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 33 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[®]. 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[®] 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[®] 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

Direct Expenditure	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.
Indirect Expenditure	the second and subsequent rounds of spending of the travel dollars (direct expenditures) in Indiana for Indiana-produced goods and services.
Input-Output (I-O) Model	an economic analysis method which is designed to measure the indirect and induced effects of a direct change in a region's economy.
Participant Day	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.
Travel and Tourism Industry	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.
VFR	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 ± 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 two-thirds 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	30.4%
2)	Illinois	17.4
3)	Michigan	13.0
4)	Ohio	7.6

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 Florida, Pennsylvania, California, Wisconsin, and Texas. In all, visitors from twenty-three different states and three travel parties from Canada 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 (75.6 percent). An additional one in six have attended college, but not graduated (15.6 percent). The Elkhart visitor is also most likely to be working, and in a professional job (46.5 percent). Nearly one in four of the visitors surveyed are retired.

DEMOGRAPHICS OF VISITORS TO ELKHART COUNTY

EDUCATION

Post-Graduate	40.0%
College Graduate	35.6
Some College	15.6
High School Graduate	8.8

OCCUPATION

Professional	46.5%
Retired	23.2
Managerial	11.6
Personal Service	5.8
Operative, incl. Transport	4.7
Sales	3.5
Craftsman	2.3
Laborer	1.2
Construction	1.2

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 (84.8%). Other sources include:

Friends/Relatives	52.2%
Local Visitors Bureau	18.5
Magazines	13.0
State Tourism Office	8.7
Newspapers	6.5
Auto Club	3.3
Travel Agent	2.2

Trip Characteristics

The destination tourism business Elkhart County enjoys is derived primarily from visitors on either a short trip (68.5%) of one to three nights in length or a vacation (15.2%). Over four out of five of the visitors interviewed were on one of these two trip types. An additional 14.1% were on a day trip. Nearly nine in ten of those who spent the night stayed in motels (88.6%). Nationally, pleasure travel accounted for over 80 percent of the one billion plus trips in 2016. The remainder results from business travel.

Over two-fifths of these travelers to Elkhart County (43.5%) are on their first visit to the county. This ranges from one out of three attraction visitors to one out of two for motel guests. Overall, visitors have taken an average of 3.1 trips to the area in the past two years. The typical travel party has an average of 3.3 people. The average length of stay is 2.2 days.

Travelers visited a number of attractions in the Elkhart County area. On average a travel party visited 2.0 attractions. The most visited attractions by those interviewed were:

- Das Dutchman Essenhaus
- Antique Stores/Malls
- Amish Acres
- Shiphewana
- Yoder Department Store
- Round Barn Theatre
- Quilt Trail/Gardens
- Blue Gate Restaurant & Theatre
- RV/MH Hall of Fame
- Amish Land Bike Ride
- Ruthmere
- Bonneyville Mill
- Heritage Trail
- Museums (general)
- Menno-Hof
- Wakarusa Dime Store.

The most frequently mentioned activities that visitors participate in while in Elkhart County are dining (71.7 percent), shopping (51.1 percent), theatre (20.7 percent), visiting friends or relatives (17.4 percent), camping (9.8 percent), biking (6.5 percent), swimming (2.2 percent), and hiking (2.2 percent). On average a travel party participated in 2.0 activities.

APPENDIX D

Business Questionnaires

Office Use Only
County _____
Interview _____
INCVB17

INDIANA HOTEL/MOTEL QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **April 9, 2018**.

- 1. Number of rooms sold during entire year - 2017. _____
- 2. Average number of guests per room - 2017. _____
- 3. Estimated proportion of guests from outside Elkhart Co. _____
- 4. Number of rooms at facility at beginning of 2017. _____

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.

Office Use Only
County _____
Interview _____
INCVB17

INDIANA BED & BREAKFAST QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **April 9, 2018**.

- 1. Number of rooms sold during entire year - 2017. _____
- 2. Average number of guests per room - 2017. _____
- 3. Estimated proportion of guests from outside Elkhart Co. _____
- 4. Number of guest rooms at facility at beginning of 2017. _____

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.

Office Use Only
County _____
Interview _____
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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 **April 9, 2018**.

1. Number of visitors to attraction during entire year-2017. ____
2. Estimated proportion of visitors from outside Elkhart Co. ____

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.

Office Use Only
County _____
Interview _____
INCVB17 _____

INDIANA CAMPGROUND QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **April 9, 2018**.

1. Number of camper nights sold during entire year - 2017. _____
2. Average number of campers per site - 2017. _____
3. Estimated proportion of campers from outside Elkhart Co. _____
4. Number of improved sites at facility at beginning of 2017 _____

NOTES: 1-a camper night is defined as the rental of one camp-site 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.

Office Use Only

County _____
Interview _____
INCVB17

ELKHART COUNTY STORE/SHOP QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **April 9, 2018**.

1. Number of visitors to store/shop during entire year-2017 _____
2. Estimated proportion of visitors from outside Elkhart Co. _____

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.

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.

APPENDIX F

Economic Impact Data Tables (Time Series)

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

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

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

	<u>2011</u>	<u>2013</u>
Total Expenditures	\$401,566,418	\$431,926,159
Direct Expenditures	\$273,062,980	\$293,707,439
Indirect Expenditures	\$128,503,438	\$138,218,720
 Annual Change Between 2011 and 2013 (Direct Expenditures Only)		3.8%
 Annual Change Between 2011 and 2013 (Adjusted for Inflation)		1.8%
 Total Wages	\$ 83,362,819	\$ 89,665,322
 Total Taxes	\$ 94,505,285	\$101,378,082
State	\$ 34,737,779	\$ 37,364,069
Local	\$ 18,718,679	\$ 20,133,874
Federal	\$ 41,048,827	\$ 43,880,139
 Total Employment	5,426	5,501
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>
Total Expenditures	\$367,642,103	\$401,566,418
Direct Expenditures	\$249,994,630	\$273,062,980
Indirect Expenditures	\$117,647,473	\$128,503,438
 Annual Change Between 2009 and 2011 (Direct Expenditures Only)		4.6%
 Annual Change Between 2009 and 2011 (Adjusted for Inflation)		1.6%
 Total Wages	\$ 78,158,542	\$ 83,362,819
 Total Taxes	\$ 87,844,994	\$ 94,505,285
State	\$ 31,803,133	\$ 34,737,779
Local	\$ 17,137,326	\$ 18,718,679
Federal	\$ 38,904,535	\$ 41,048,827
 Total Employment	5,266	5,426
Jobs (Direct Expenditures)	3,991	4,112
Jobs (Indirect Expenditures)	1,275	1,314

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

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

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

	<u>2005</u>	<u>2007</u>
Total Expenditures	\$326,916,886	\$358,631,426
Direct Expenditures	\$221,548,446	\$243,867,419
Indirect Expenditures	\$105,368,441	\$114,764,007
 Annual Change Between 2005 and 2007 (Direct Expenditures Only)		5.0%
 Annual Change Between 2005 and 2007 (Adjusted for Inflation)		1.7%
 Total Wages	\$ 69,827,518	\$ 76,242,925
 Total Taxes	\$ 78,114,045	\$ 85,691,968
State	\$ 28,280,170	\$ 31,023,658
Local	\$ 15,238,955	\$ 16,717,301
Federal	\$ 34,594,921	\$ 37,951,009
 Total Employment	4,915	5,239
 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>
Total Expenditures	\$301,128,838	\$326,916,886
Direct Expenditures	\$204,072,132	\$221,548,446
Indirect Expenditures	\$ 97,056,706	\$105,368,441
 Annual Change Between 2003 and 2005 (Direct Expenditures Only)		4.3%
 Annual Change Between 2003 and 2005 (Adjusted for Inflation)		1.4%
 Total Wages	 \$ 65,776,806	 \$ 69,827,518
 Total Taxes	 \$ 71,952,208	 \$ 78,114,045
State	\$ 26,049,358	\$ 28,280,170
Local	\$ 14,036,866	\$ 15,238,955
Federal	\$ 31,865,984	\$ 34,594,921
 Total Employment	 4,663	 4,915
Jobs (Direct Expenditures)	3,525	3,715
Jobs (Indirect Expenditures)	1,138	1,200

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

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

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

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

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

Total Expenditures	\$236,724,937
Direct Expenditures	\$158,291,499
Indirect Expenditures	\$ 78,433,438
Total Wages	\$ 54,575,451
Total Taxes	\$ 58,970,929
State	\$ 20,478,054
Local	\$ 11,034,733
Federal	\$ 27,458,142
Total Employment	4,187
Jobs (Direct Expenditures)	3,133
Jobs (Indirect Expenditures)	1,054