

The Iowa Visitor Economy 2023

Research on 2023 Visitors to Iowa
and its Economic Impact on Western Iowa Tourism Region Counties



Western Iowa Tourism Region
visitwesterniowa.com

The Iowa Visitor Economy 2023

The travel sector is an integral part of the Iowa economy. Visitors generate significant economic benefits to households, businesses, and government alike and represent a critical driver of the state's future.

By monitoring the visitor economy, policymakers can inform decisions regarding the funding and prioritization of the sector's development. They can also carefully monitor its successes and future needs. By establishing a timeline of economic impacts, the industry can track its progress.

To quantify the economic significance of the tourism sector in Iowa, Tourism Economics has prepared a comprehensive model detailing the far-reaching impacts arising from visitor spending. The results of this study show the scope of the travel sector in terms of direct visitor spending, as well as the total economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

ECONOMIC IMPACT METHODOLOGY

Our analysis of the Iowa visitor economy begins with direct visitor spending and analyzes the downstream effects of this spending on the broader economy. To determine total economic impact, we input direct spending into a model of the Iowa economy, constructed using an IMPLAN input-output (I-O) model. The model traces the full extent of industry impacts as dollars flow through the local economy.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and quantifies three levels of impact:

1. **Direct impacts:** Visitor spending creates direct economic value within a discrete group of sectors (such as recreation and transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
2. **Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts or supply-chain effects.
3. **Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by visitor spending spend those wages in the local economy. This is called the induced impact or income effect.

The Tourism Economics model calculates these three levels of impact - direct, indirect and induced - for a broad set of indicators, including:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

ACCESS THE FULL REPORT



Access the full report (PDF) and interactive dashboard at industrypartners.traveliowa.com/economic-impact-report/

- 2023 Interactive Dashboard
- 2023 Full Report (PDF)
- 2023 County-Level Data (Excel)

The County-Level Data (Excel) provides the statewide and county-level spending data from 2019-2023 and was used to create the tables and charts in this WITR report.

Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024

ECONOMIC IMPACT FRAMEWORK



Data Sources & Appendix

METHODOLOGY AND DATA SOURCES

An IMPLAN input-output model was constructed for Iowa. The model traces the flow of visitor-related expenditures through the region's economy and their effects on employment, wages, and taxes. IMPLAN also quantifies the indirect (supplier) and induced (income) impacts of tourism. Tourism Economics then cross-checked these findings with employment and wage data for each sector to ensure the findings are within reasonable ranges.

Visitors included those who stayed overnight or those who traveled more than 50 miles to the destination.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis.

This is more comprehensive than Bureau of Labor Statistics (ES202/QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the ES202 data.

The analysis draws on the following data sources:

- **Arrivalist:** mobile device geolocation data
- **Bureau of Economic Analysis and Bureau of Labor Statistics:** employment and wage data, by industry
- **STR:** lodging performance data, including room demand, room rates, occupancy, and room revenue
- **Tax collections:** sales and lodging tax receipts
- **US Census:** business sales by industry and seasonal second homes inventory
- **Tourism Economics:** international travel data for overseas, Canadian, and Mexican travel to Iowa based on aviation, survey, and credit card information.

GLOSSARY—SPENDING DEFINITIONS

Lodging—Includes visitor spending in the accommodation sub-sector. This includes food and other services provided by hotels, rentals and similar establishments.

Food and beverage—Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.

Recreation—Includes visitor spending within the arts, entertainment and recreation sub-sector.

Shopping—Includes visitor spending in all retail sub-sectors within the local economy.

Local transport—Includes visitor spending on local transport services such as taxis, limos, trains, rental cars, buses, and the local share of air transportation spending.

Service stations—Visitor spending on gasoline.

Second homes—Where applicable, spending associated with the upkeep of seasonal second homes for recreational use as defined by the Census Bureau.

GLOSSARY— ECONOMIC IMPACT DEFINITIONS

Direct Impact—Impacts (business sales, jobs, income, and taxes) created directly from spending by visitors to a destination within a discreet group of tourism-related sectors (e.g. recreation, transportation, lodging).

Indirect Impact—Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected tourism-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).

Induced Impact—Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor spending.

Employment—Employment is measured by the Bureau of Economic Analysis (BEA) and Bureau of Labor Statistics (BLS) definitions, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.

Labor Income—Income (wages, salaries, proprietor income and benefits) supported by visitor spending.

Value Added (Gross Domestic Product (GDP))—The economic enhancement a company gives its products or services before offering them to customers.

Local Taxes—City and County taxes generated by visitor spending. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities—from transportation to sanitation to general government.

State Taxes—State tax revenues generated by visitor spending. This will include sales, income, corporate, usage fees and other assessments of state governments.

Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024 | Access the full report (PDF), 2023 County Level Data (Excel) and the Interactive Dashboard at industrypartners.traveliowa.com/economic-impact-report/

Iowa Economic Impact Summary



Visitor Spending

\$7.3 BILLION

The \$7.3 billion in visitor spending means that approximately \$20 million was spent EVERY DAY by visitors to Iowa.



Total Labor Income

\$2.5 BILLION

The \$2.5 billion in total income generated by tourism is the equivalent of \$1,910 for every household in Iowa.



State & Local Taxes

\$1.1 BILLION

The \$1.1 billion in state and local taxes generated by tourism would cover the average salaries of 19,681 public school teachers in Iowa.



Total Jobs

70,954

The number of jobs sustained by tourism (70,954) supports 5.4% of all jobs in Iowa.

2023	Iowa	
	Direct	Total
Visitor Spending (\$m)	\$7.3 B	\$10.9B
Labor Income (\$m)	\$1.4B	\$2.5B
State Taxes (\$m)	\$0.6B	\$0.8B
Local Taxes (\$m)	\$0.5B	\$0.8B
Employment	50,145	70,954

2023 SPENDING AND ECONOMIC IMPACT

2023 VISITOR SPENDING



2023 LABOR INCOME (\$B)



2023 STATE TAXES (\$B)



2023 LOCAL TAXES (\$B)

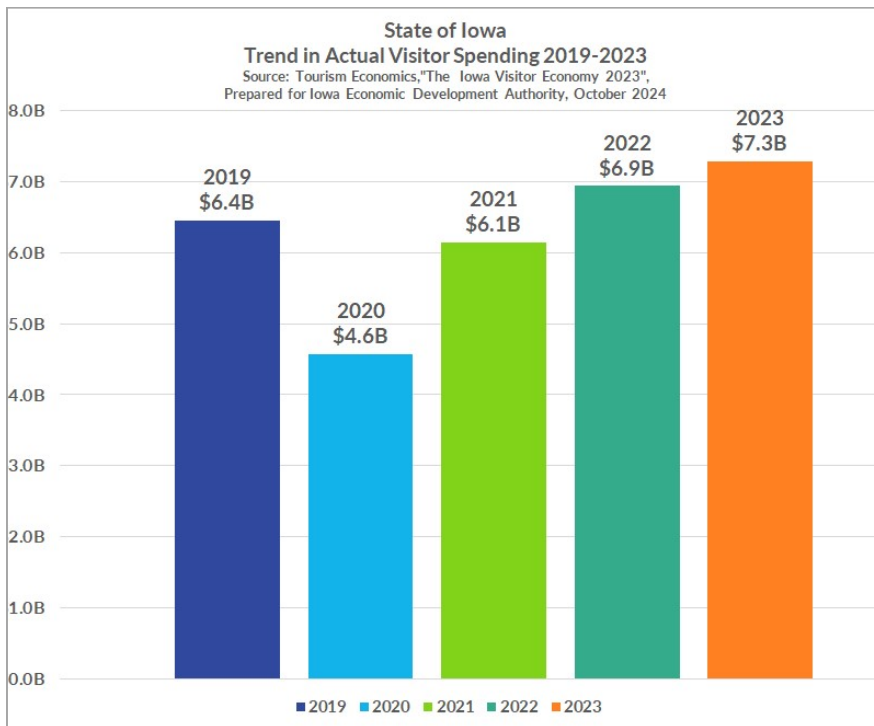


2023 EMPLOYMENT



Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024 | Access the full report (PDF), 2023 County Level Data (Excel) and the Interactive Dashboard at industrypartners.traveliowa.com/economic-impact-report/

State of Iowa



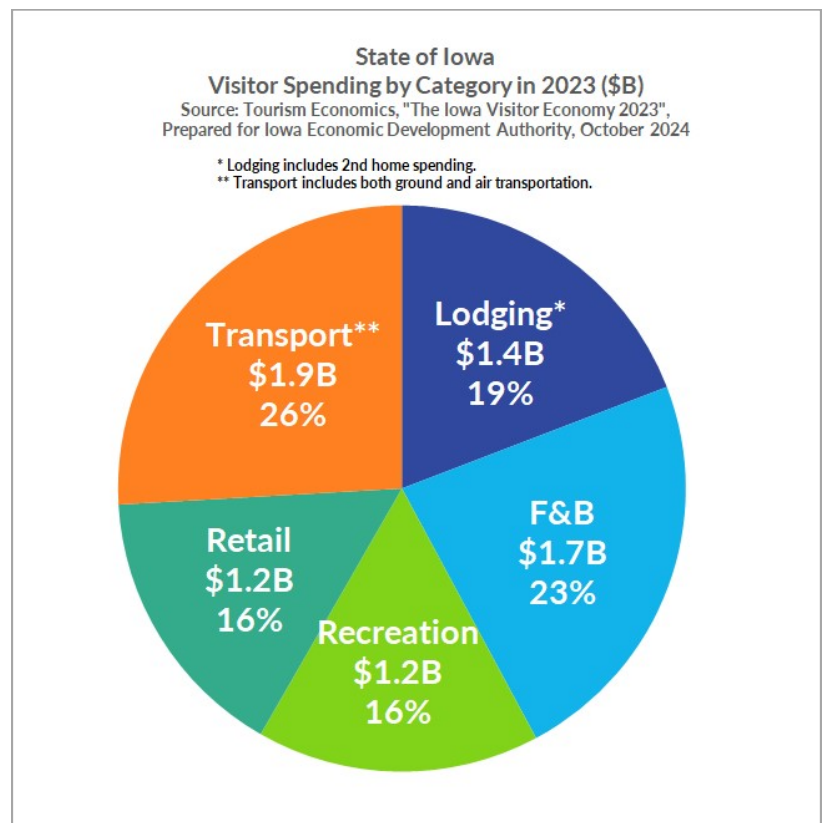
SPENDING AND ECONOMIC IMPACT (\$ B)		
2023	Iowa	
	Direct	Total
Employment	50,145	70,954
Labor Income	\$1.4B	\$2.5B
State Taxes	\$0.6B	\$0.8B
Local Taxes	\$0.5B	\$0.8B
Visitor Spending	\$7.3B	\$10.9B

Actual Visitor Spending (\$ B) 2019-2023

VISITOR SPENDING BY CATEGORY (\$ B)	
2023	Iowa
Lodging (\$m)	\$1.4B
Food & Beverage (\$m)	\$1.7B
Recreation (\$m)	\$1.2B
Retail (\$m)	\$1.2B
Transportation* (\$m)	\$1.9B
Spending--Direct (\$m)	\$7.3B
Growth Rate 2023/2022	5.1%
Share of State Spending	100%

* Lodging includes 2nd home spending.

** Transportation includes both ground and air transportation.

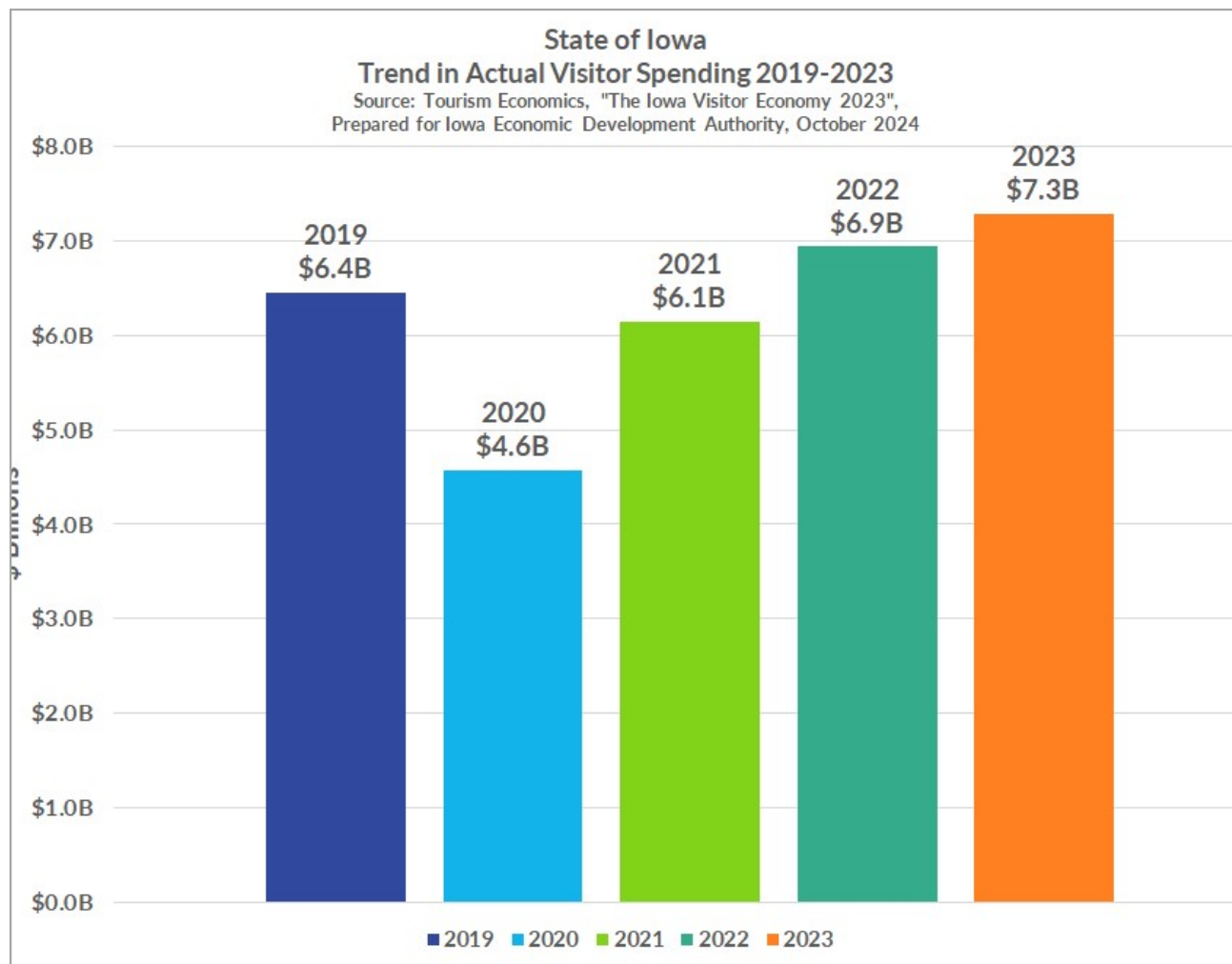


Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024 | Access the full report (PDF), 2023 County Level Data (Excel) and the Interactive Dashboard at industrypartners.traveliowa.com/economic-impact-report/

Iowa Visitor Spending 2019–2023

Iowa Visitor Spending, \$ millions, 2023 percentage change and percent recovered relative to 2019

2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
\$6,449	\$4,565	\$6,148	\$6,939	\$7,289	5.1%	113.0%



Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024 | Access the full report (PDF), 2023 County Level Data (Excel) and the Interactive Dashboard at industrypartners.traveliowa.com/economic-impact-report/

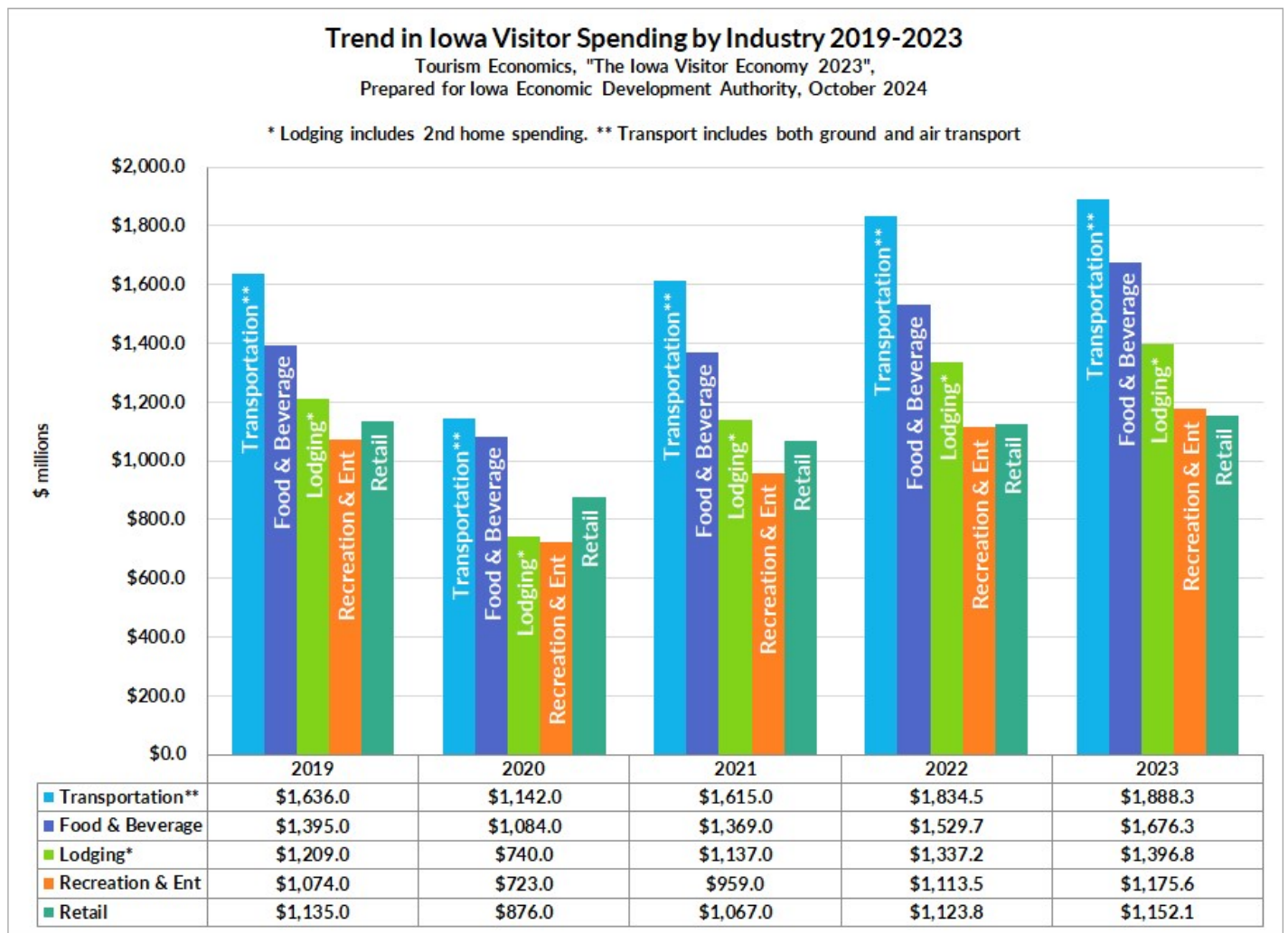
Iowa Visitor Spending by Industry 2019–2023

	2019	2020	2021	2022	2023	2023 Growth	% relative to 2019
Total Visitor Spending	\$6,449	\$4,565	\$6,148	\$6,939	\$7,289	5.1%	113.0%
Transportation**	\$1,636	\$1,142	\$1,615	\$1,834	\$1,888	2.9%	115.4%
Food & Beverage	\$1,395	\$1,084	\$1,369	\$1,530	\$1,676	9.6%	120.2%
Lodging*	\$1,209	\$740	\$1,137	\$1,337	\$1,397	4.5%	115.5%
Recreation & Entertainment	\$1,074	\$723	\$959	\$1,114	\$1,176	5.6%	109.5%
Retail	\$1,135	\$876	\$1,067	\$1,124	\$1,152	2.5%	101.5%

Source: Tourism Economics

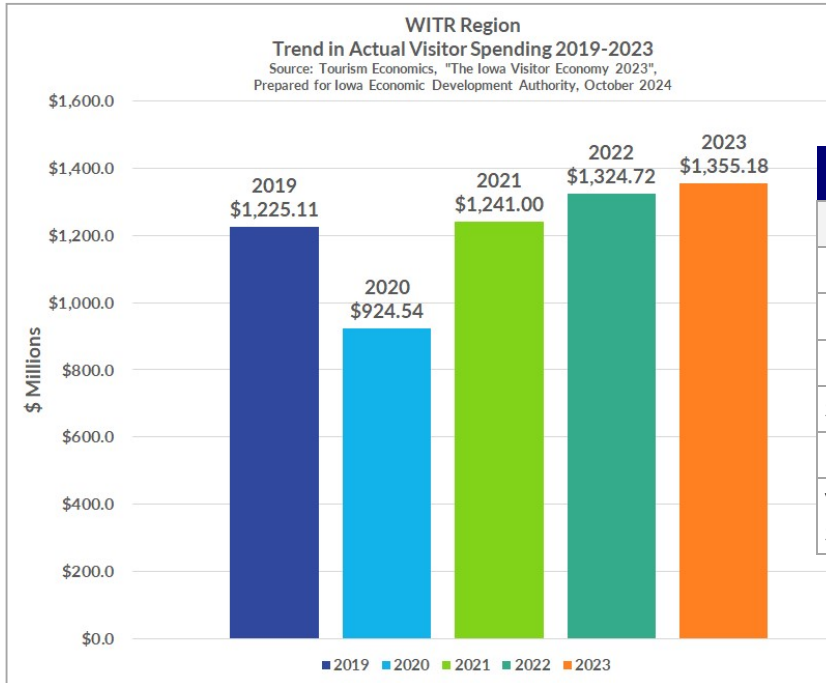
* Lodging includes 2nd home spending.

** Transportation includes both ground and air transportation.



Source: Tourism Economics, "The Iowa Visitor Economy 2023", Prepared for Iowa Economic Development Authority, October 2024 | Access the full report (PDF), 2023 County Level Data (Excel) and the Interactive Dashboard at industrypartners.traveliowa.com/economic-impact-report/

Western Iowa Tourism Region Total



SPENDING AND ECONOMIC IMPACT (\$ M)

2023	WITR Total		Iowa	
	Direct	Total	Direct	Total
Employment	8,722	12,500	50,145	70,954
Labor Income	\$251.83	\$433.59	\$1.4B	\$2.5B
State Taxes	\$118.63	\$162.87	\$0.6B	\$0.8B
Local Taxes	\$94.55	\$146.26	\$0.5B	\$0.8B
Visitor Spending	\$1,355.18	\$2,011.01	\$7.3B	\$10.9B

◀ Actual Visitor Spending (\$ M) 2019-2023

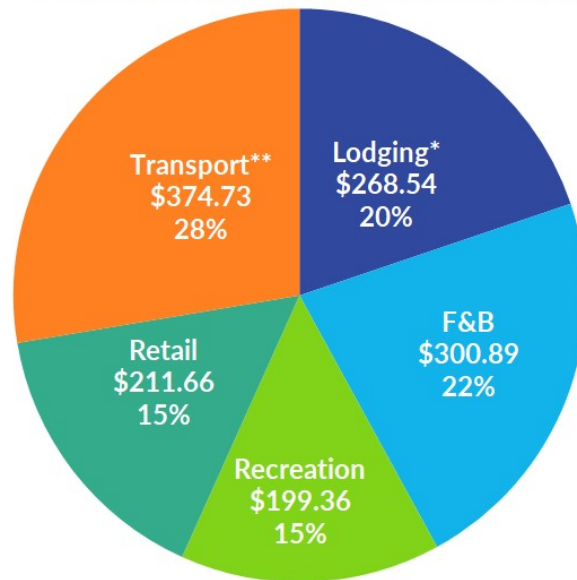
VISITOR SPENDING BY CATEGORY (\$ M)

2023	WITR Total	Iowa
Lodging (\$m)	\$268.54	\$1.4B
Food & Beverage (\$m)	\$300.89	\$1.7B
Recreation (\$m)	\$199.36	\$1.2B
Retail (\$m)	\$211.66	\$1.2B
Transportation* (\$m)	\$374.73	\$1.9B
Spending--Direct (\$m)	\$1,355.18	\$7.3B
Growth Rate 2023/2022	73.00%	5.1%
Share of State Spending	19.00%	100%

* Lodging includes 2nd home spending.

** Transportation includes both ground and air transportation.

Western Iowa Tourism Region
Visitor Spending by Category in 2023 (\$ mil)
Source: Tourism Economics, "The Iowa Visitor Economy 2023",
Prepared for Iowa Economic Development Authority, October 2024
* Lodging includes 2nd home spending.** Transport includes both ground and air transportation.



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Western Iowa Tourism Region Summary—Economic Impacts 2023

	Employment		Share of State	Labor Income (\$ M)		State Taxes (\$ M)		Local Taxes (\$ M)		Spending (\$ M)	
County	Direct	Total		Direct	Total	Direct	Total	Direct	Total	Direct	Total
Adair	83	121	0.2%	\$1.91	\$3.45	\$1.31	\$1.79	\$0.92	\$1.45	\$14.30	\$21.59
Adams	24	34	0.0%	\$0.56	\$0.99	\$0.33	\$0.44	\$0.28	\$0.40	\$3.95	\$5.90
Audubon	28	41	0.1%	\$0.74	\$1.30	\$0.54	\$0.73	\$0.33	\$0.51	\$5.34	\$7.80
Buena Vista	286	405	0.6%	\$7.21	\$12.52	\$3.33	\$4.57	\$2.17	\$3.41	\$40.97	\$60.39
Calhoun	40	59	0.1%	\$1.09	\$1.91	\$0.67	\$0.90	\$0.55	\$0.85	\$6.47	\$9.63
Carroll	266	375	0.5%	\$6.15	\$10.84	\$2.85	\$3.94	\$2.06	\$3.28	\$33.82	\$51.18
Cass	110	162	0.2%	\$2.63	\$4.72	\$1.62	\$2.21	\$1.08	\$1.71	\$17.98	\$27.21
Cherokee	99	139	0.2%	\$2.40	\$4.20	\$1.29	\$1.77	\$0.62	\$1.03	\$12.22	\$18.66
Clay	201	302	0.4%	\$5.70	\$10.08	\$3.12	\$4.29	\$2.70	\$4.18	\$40.48	\$60.13
Crawford	145	203	0.3%	\$3.92	\$6.75	\$1.76	\$2.42	\$0.97	\$1.59	\$17.78	\$27.06
Dickinson	940	1,423	2.0%	\$27.75	\$48.57	\$18.64	\$25.00	\$17.62	\$26.08	\$233.71	\$333.17
Emmet	51	75	0.1%	\$1.41	\$2.48	\$0.85	\$1.16	\$0.57	\$0.91	\$8.35	\$12.64
Fremont	103	148	0.2%	\$2.90	\$4.97	\$1.34	\$1.83	\$0.76	\$1.22	\$14.65	\$21.64
Guthrie	137	192	0.3%	\$3.65	\$6.32	\$1.89	\$2.59	\$1.60	\$2.46	\$18.92	\$27.65
Harrison	115	161	0.2%	\$2.36	\$4.24	\$1.21	\$1.68	\$0.79	\$1.31	\$11.77	\$18.37
Humboldt	62	89	0.1%	\$1.86	\$3.20	\$0.73	\$1.03	\$0.58	\$0.93	\$9.08	\$13.79
Ida	72	100	0.1%	\$1.53	\$2.71	\$0.92	\$1.26	\$0.52	\$0.84	\$7.46	\$11.21
Kossuth	91	135	0.2%	\$2.06	\$3.77	\$1.48	\$2.02	\$0.94	\$1.51	\$14.24	\$22.07
Lyon	131	190	0.3%	\$3.40	\$5.89	\$2.46	\$3.23	\$1.17	\$1.77	\$30.27	\$42.19
Mills	48	70	0.1%	\$1.25	\$2.20	\$0.71	\$0.97	\$0.34	\$0.57	\$6.32	\$9.99
Monona	117	162	0.2%	\$2.94	\$5.10	\$1.14	\$1.60	\$0.92	\$1.48	\$11.18	\$17.02
Montgomery	110	153	0.2%	\$3.01	\$5.17	\$1.28	\$1.79	\$0.81	\$1.31	\$11.68	\$17.82
O'Brien	113	164	0.2%	\$2.99	\$5.22	\$1.56	\$2.13	\$1.08	\$1.68	\$19.00	\$28.28
Osceola	40	56	0.1%	\$0.89	\$1.58	\$0.51	\$0.70	\$0.29	\$0.47	\$5.30	\$7.90
Page	75	114	0.2%	\$1.73	\$3.18	\$1.25	\$1.73	\$0.79	\$1.29	\$12.76	\$19.96
Palo Alto	169	235	0.3%	\$4.08	\$7.07	\$1.99	\$2.73	\$1.76	\$2.71	\$19.74	\$29.10
Plymouth	162	239	0.3%	\$4.15	\$7.35	\$2.47	\$3.34	\$1.56	\$2.44	\$27.94	\$42.77
Pocahontas	32	45	0.1%	\$0.68	\$1.21	\$0.39	\$0.54	\$0.25	\$0.40	\$4.05	\$5.98
Pottawattamie	2,322	3,283	4.6%	\$77.42	\$130.76	\$30.73	\$42.60	\$25.97	\$40.21	\$336.24	\$498.98
Ringgold	36	56	0.1%	\$1.04	\$1.87	\$0.98	\$1.32	\$0.77	\$1.18	\$8.92	\$12.93
Sac	52	77	0.1%	\$1.49	\$2.63	\$1.00	\$1.35	\$0.91	\$1.36	\$11.86	\$17.07
Shelby	50	75	0.1%	\$1.42	\$2.51	\$0.84	\$1.15	\$0.50	\$0.80	\$9.81	\$14.89
Sioux	302	432	0.6%	\$7.51	\$13.11	\$4.02	\$5.45	\$2.62	\$4.05	\$50.50	\$75.00
Taylor	14	21	0.0%	\$0.32	\$0.58	\$0.27	\$0.36	\$0.14	\$0.21	\$3.11	\$4.50
Union	143	201	0.3%	\$4.21	\$7.14	\$1.87	\$2.56	\$1.07	\$1.71	\$18.07	\$27.24
Woodbury	1,955	2,760	3.9%	\$57.49	\$97.97	\$21.28	\$29.69	\$18.56	\$28.95	\$256.95	\$389.32
WITR Total	8,722	12,500	18%	\$251.83	\$433.59	\$118.63	\$162.87	\$94.55	\$146.26	\$1,355.18	\$2,011.01

Western Iowa Tourism Region Summary—By Spending Category 2023

County	Lodging*	F&B	Recreation	Retail	Transport**	Total	Growth Rate (2023/2022)	Share of State
Adair	\$2.80	\$2.97	\$1.62	\$2.33	\$4.59	\$14.30	-4.1%	0.2%
Adams	\$0.82	\$0.92	\$0.68	\$0.55	\$0.97	\$3.95	3.2%	0.1%
Audubon	\$0.87	\$0.95	\$0.77	\$0.74	\$2.00	\$5.34	3.1%	0.1%
Buena Vista	\$8.30	\$9.21	\$5.70	\$6.71	\$11.05	\$40.97	5.1%	0.6%
Calhoun	\$1.01	\$1.20	\$0.81	\$0.87	\$2.59	\$6.47	0.1%	0.1%
Carroll	\$5.58	\$7.69	\$4.77	\$6.15	\$9.63	\$33.82	3.9%	0.5%
Cass	\$3.03	\$3.83	\$2.68	\$2.88	\$5.55	\$17.98	-1.6%	0.2%
Cherokee	\$2.18	\$2.90	\$1.81	\$1.94	\$3.39	\$12.22	1.8%	0.2%
Clay	\$7.93	\$8.92	\$5.64	\$8.03	\$9.97	\$40.48	1.2%	0.6%
Crawford	\$2.85	\$3.99	\$2.66	\$2.75	\$5.54	\$17.78	5.7%	0.2%
Dickinson	\$56.11	\$47.12	\$34.22	\$34.57	\$61.69	\$233.71	3.8%	3.2%
Emmet	\$1.30	\$1.48	\$0.89	\$1.34	\$3.36	\$8.35	-0.1%	0.1%
Fremont	\$2.55	\$2.61	\$1.66	\$1.98	\$5.85	\$14.65	-8.4%	0.2%
Guthrie	\$3.86	\$3.76	\$2.68	\$3.07	\$5.54	\$18.92	4.8%	0.3%
Harrison	\$2.04	\$3.02	\$1.28	\$1.75	\$3.69	\$11.77	-0.9%	0.2%
Humboldt	\$1.54	\$1.95	\$1.19	\$1.37	\$3.03	\$9.08	0.9%	0.1%
Ida	\$1.39	\$1.49	\$1.12	\$1.14	\$2.33	\$7.46	-2.3%	0.1%
Kossuth	\$2.24	\$3.12	\$2.05	\$2.01	\$4.82	\$14.24	-3.5%	0.2%
Lyon	\$4.72	\$4.02	\$10.85	\$3.10	\$7.58	\$30.27	5.9%	0.4%
Mills	\$0.83	\$1.69	\$0.84	\$0.89	\$2.08	\$6.32	0.4%	0.1%
Monona	\$1.85	\$2.22	\$1.94	\$1.76	\$3.40	\$11.18	-2.2%	0.2%
Montgomery	\$1.99	\$2.43	\$1.89	\$1.81	\$3.56	\$11.68	1.1%	0.2%
O'Brien	\$3.56	\$4.34	\$2.22	\$2.89	\$5.98	\$19.00	18.7%	0.3%
Osceola	\$0.70	\$0.94	\$0.64	\$0.68	\$2.34	\$5.30	-1.6%	0.1%
Page	\$2.24	\$3.18	\$1.50	\$2.01	\$3.84	\$12.76	1.6%	0.2%
Palo Alto	\$3.53	\$4.00	\$2.96	\$3.00	\$6.25	\$19.74	4.9%	0.3%
Plymouth	\$4.59	\$6.91	\$4.14	\$4.35	\$7.96	\$27.94	3.5%	0.4%
Pocahontas	\$0.53	\$0.65	\$0.55	\$0.56	\$1.76	\$4.05	0.7%	0.1%
Pottawattamie	\$70.23	\$76.06	\$47.45	\$49.90	\$92.59	\$336.24	2.0%	4.6%
Ringgold	\$1.41	\$1.13	\$0.79	\$1.01	\$4.57	\$8.92	0.5%	0.1%
Sac	\$2.27	\$2.20	\$1.62	\$1.83	\$3.94	\$11.86	6.0%	0.2%
Shelby	\$1.58	\$2.39	\$1.75	\$1.34	\$2.76	\$9.81	5.4%	0.1%
Sioux	\$9.32	\$12.80	\$7.75	\$7.28	\$13.35	\$50.50	7.5%	0.7%
Taylor	\$0.52	\$0.56	\$0.50	\$0.42	\$1.11	\$3.11	0.1%	0.0%
Union	\$3.26	\$4.36	\$2.28	\$2.85	\$5.31	\$18.07	5.8%	0.2%
Woodbury	\$49.00	\$63.89	\$37.47	\$45.81	\$60.78	\$256.95	0.0%	3.5%
WITR total	\$268.54	\$300.89	\$199.36	\$211.66	\$374.73	\$1,355.18	73%	19%