

ECONOMIC IMPACT OF THE SOUTH BEND/MISHAWAKA AREA

TOURISM AND TRAVEL INDUSTRY - 2006 AND 2009

Prepared for:

**South Bend/Mishawaka
Convention and Visitors Bureau**

Prepared by

Certec Inc.

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EXECUTIVE SUMMARY

A detailed examination of the expenditure, employment, and tax impacts generated by the South Bend/Mishawaka area tourism and travel industry, as well as the industry structure, has been conducted for the South Bend/Mishawaka Convention and Visitors Bureau. The major findings of the 2009 study follow:

- The tourism and travel industry contributed over \$635.1 million to St. Joseph County's economy in 2009. Direct expenditures by tourists accounted for \$408.3 million of this total – a growth of 2.7 percent annually since 2006.
- The tourism industry generated nearly \$160.2 million in tax revenues to government - \$58.0 million to the state, \$31.2 million locally, and \$70.9 million to the federal government.
- Residents of St. Joseph County spent an additional \$53.1 million with the local tourism industry. This direct spending created 786 jobs.
- A total of 8,316 jobs in St. Joseph County resulted from the industry in 2009. Direct spending created 6,039 of these jobs.
- Over one-third of the jobs created were in high wage occupations.
- The tourism-generated jobs provided over \$135.4 million in wages to St. Joseph County workers – an increase of \$10.2 million over 2006 wages.
- Expenditures by category showed that shopping, food and beverage, and lodging purchases accounted for over three out of every four dollars spent.
- Expenditures by industry sector reflected the continued importance of the attractions and lodging sectors to the local tourism industry. Over two-thirds of all direct spending was from these two sectors.

INTRODUCTION

The purpose of this study is to quantify the magnitude of the economic impact of the South Bend/Mishawaka area tourism and travel industry in 2009 and show any changes since 2006. Economic benefits begin when a traveler to the South Bend/Mishawaka 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 South Bend/Mishawaka Area 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 is a large, growing business in St. Joseph County.** The research findings in this report show the change in the importance of tourism to the economy from 2006 to 2009. 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

**SOUTH BEND/MISHAWAKA AREA TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2006 AND 2009**

	2006	2009
Total Expenditures	\$587,116,897	\$635,103,682
Direct Expenditures	\$377,494,308	\$408,348,024
Indirect Expenditures	\$209,622,589	\$226,755,658
Change Between 2006 and 2009 (Direct Expenditures Only)		2.7%
Change Between 2006 and 2009 (Adjusted for Inflation)		0.0%
Total Wages	\$125,222,972	\$135,457,813
Total Taxes	\$148,080,356	\$160,183,398
State	\$ 53,610,559	\$ 57,992,307
Local	\$ 28,888,400	\$ 31,249,534
Federal	\$ 65,581,397	\$ 70,941,556
Total Employment	8,302	8,316
Jobs (Direct Expenditures)	6,029	6,039
Jobs (Indirect Expenditures)	2,273	2,277

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ECONOMIC IMPACT OF TOURISM

Expenditures

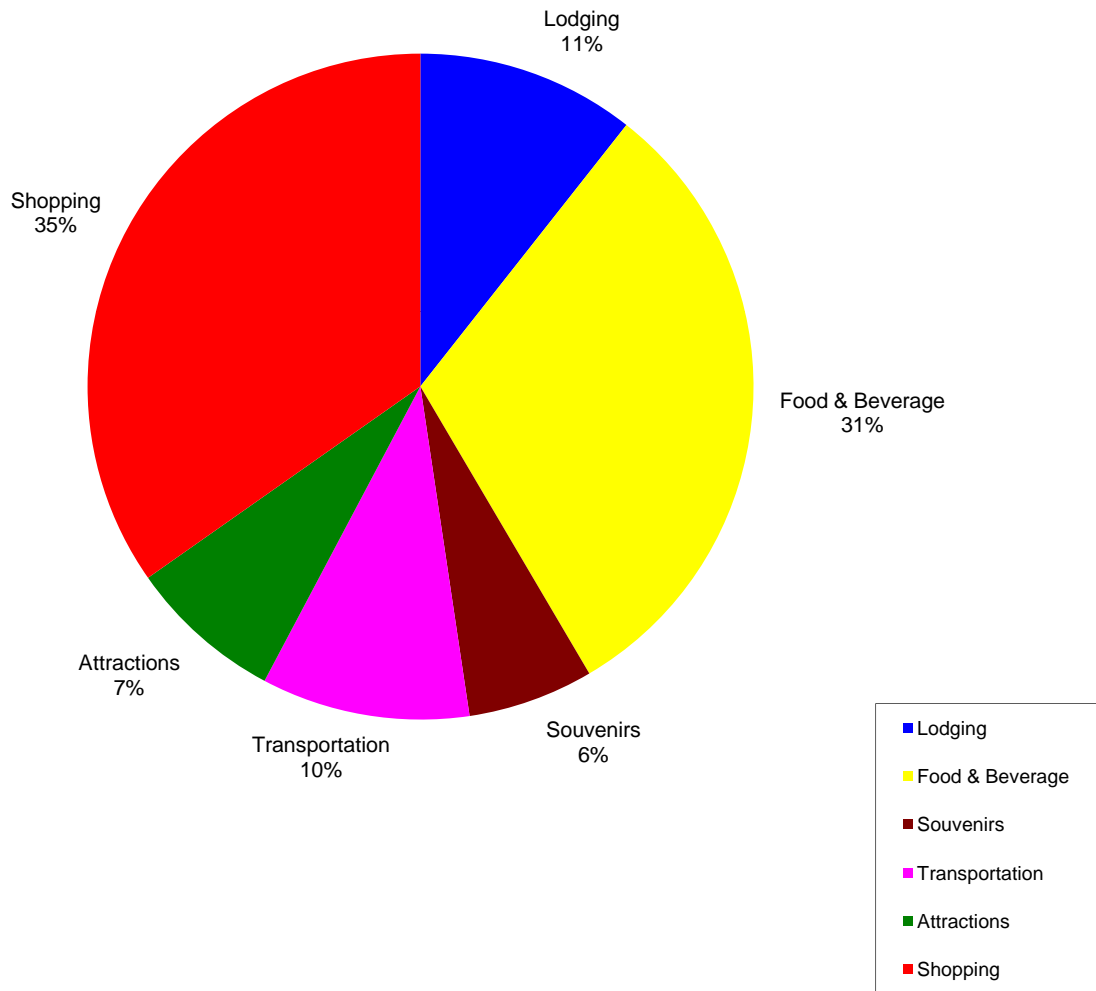
The tourism and travel industry made a total contribution to St. Joseph County's economy of \$635.1 million in 2009 (Table 1). The purchases made by travelers while in the county accounted for \$408.3 million of this total. This represents an annual increase in spending of 2.7 percent over 2006 levels. After adjusting for inflation that occurred during the two years, the annual real growth in spending did not change.

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 \$408.3 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 effects for the several rounds of re-spending of the initial dollars was the total multiplier effect of \$226.8 million.

The expenditure data were further classified by type of purchase. The countywide distribution of these expenditures is provided in Chart 1. Spending on shopping accounted for nearly 35 percent of these \$408.3 million in direct purchases. Food and beverage accounted for nearly 31 percent of all travel expenditures. Lodging and transportation collected 11 and 10 percent of the total, respectively. Expenditures on attractions amounted to seven percent. Souvenirs accounted for six percent of the purchases.

Chart 1

Travel Expenditures by Category



Total Expenditures = \$408,348,024

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Where does this money go once it is in the St. Joseph 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 the South Bend/Mishawaka area 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

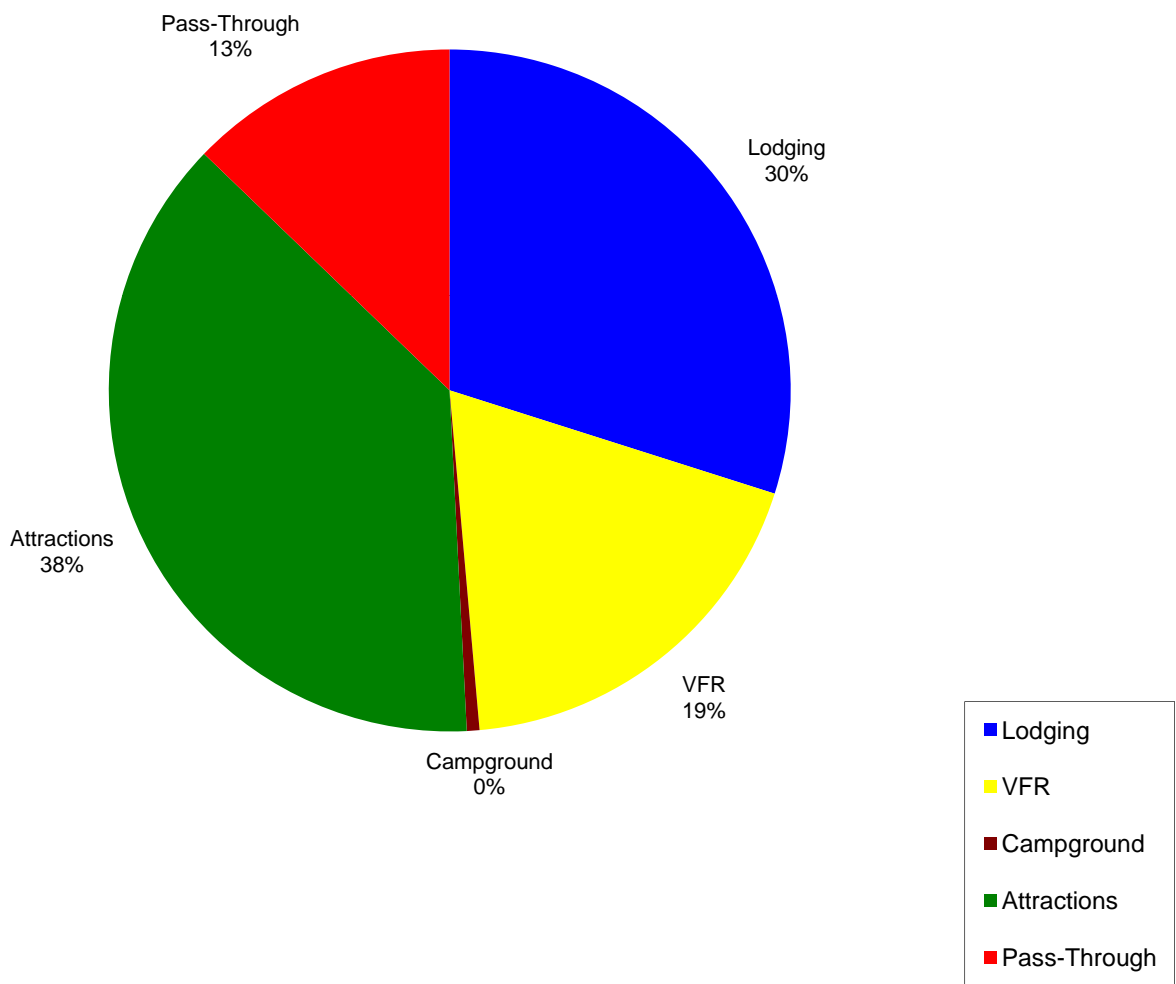
The contribution of the individual tourism sectors to the visitor expenditures varies widely. The countywide distribution of these expenditures is provided in Chart 2. Attraction visitors accounted for over 38 percent of these \$408.3 million in purchases. Lodging guests accounted for the next largest share of this spending (30 percent)—a slight decrease from 2006. Those visiting friends and relatives in the county followed with nearly 19 percent of the total spending. Individuals passing through contributed 13 percent. Campers provided less than one percent of the total.

The importance of the University of Notre Dame to tourism spending is substantial and grew between 2006 and 2009. The visitors to the university are woven throughout the local tourism industry. They fill rooms at many lodging properties in the South Bend/Mishawaka area. Notre Dame attractions and events also bring many day visitors to the county throughout the year. While in the county these travelers visit other attractions, dine in local restaurants, and shop at many retail outlets, including malls, in the area as well as purchase gasoline for their vehicles. Thus, Notre Dame visitors impact many segments of the local tourism economy.

The importance of the lodging sector to tourism spending in South Bend/Mishawaka is also substantial. It helps to maintain and further stimulate a healthy tourism industry in the area.

Chart 2

Travel Expenditures by Industry Sector



Total Expenditures = \$408,348,024

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Employment

In 2009, a total of 8,316 jobs (in FTEs [full time equivalents]) in St. Joseph County were due to the expenditures made in the tourism and travel industry (Table 1). These represent nearly seven percent of all jobs in the county in 2009. The 2009 direct expenditures of travelers accounted for 6,039 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 attractions sector lead the industry in job creation. The expenditures of the visitors within this sector generated 3,107 jobs—an increase of 86 jobs. It was followed, in turn, by the lodging sector (2,524 jobs—a decrease of 93 jobs), the VFR [visits to friends and relatives] sector (1,552 jobs), the pass-through sector (1,107 jobs—an increase of 19 jobs), and the campground sector (26 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 (36.1 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	418
Managerial	662
Marketing & sales	847
Administrative support	918
Construction	154
Craftsman	479
Agriculture & forestry	187
Operatives & fabricators	443
Laborers	280
Personal services	3,928
Total	8,316

Tourism stimulates non-tourism industries such as agriculture, fishing, meatpacking, 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 2009 every

dollar spent by travelers in St. Joseph County produced an average of 21.3 cents in wage and salary income.

The total wage and salary income generated by tourism and paid by local businesses was over \$135.4 million in 2009 (Table 1)—compared to \$125.2 million in 2006. The direct purchases of travelers accounted for over \$87.1 million of this total.

Taxes

Tourism generates state and local as well as federal tax revenues. St. Joseph County tourism expenditures resulted in the collection of nearly \$160.2 million in tax revenues in 2009 (Table 1)—compared to \$148.1 million in 2006. Over two-fifths (\$70.9 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 \$58.0 million in tax revenues generated by tourism activity within the county—up from \$53.6 million in 2006. A major portion of these revenues were obtained through sales and excise taxes, and taxes on individual and corporate income.

Local government operations in St. Joseph 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 nearly \$31.2 million in tax revenues as a result of the tourism industry—an increase from the \$28.9 million in 2006. 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-St. Joseph County residents are included in this research. Locals contributed an additional \$53.1 million in direct spending (an increase from the \$42.6 million in 2006) to the local tourism industry and generated 786 jobs.**

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 that 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 the South Bend/Mishawaka area is currently available for 2006 and 2009 through the research of Certec Inc. This research provides very detailed information on the spending of visitors in the area. For this project the 2010 data were adjusted to 2009 by correcting for inflation.

The expenditures per person per day were calculated. They are, by sector:

	2006	2009
lodging	\$110.64	\$116.77
attractions	\$49.91	\$55.03
VFR	\$53.01	\$57.70
pass through	\$29.23	\$31.71
campground	\$43.21	\$45.67

Participant Days

The South Bend/Mishawaka Area is divided into tourism sectors. Certec identified tourism and travel businesses operating in 2009 from a review of local tourism publications as well as several individual business brochures. This information was used to update the 2006 database developed for the previous year's study.

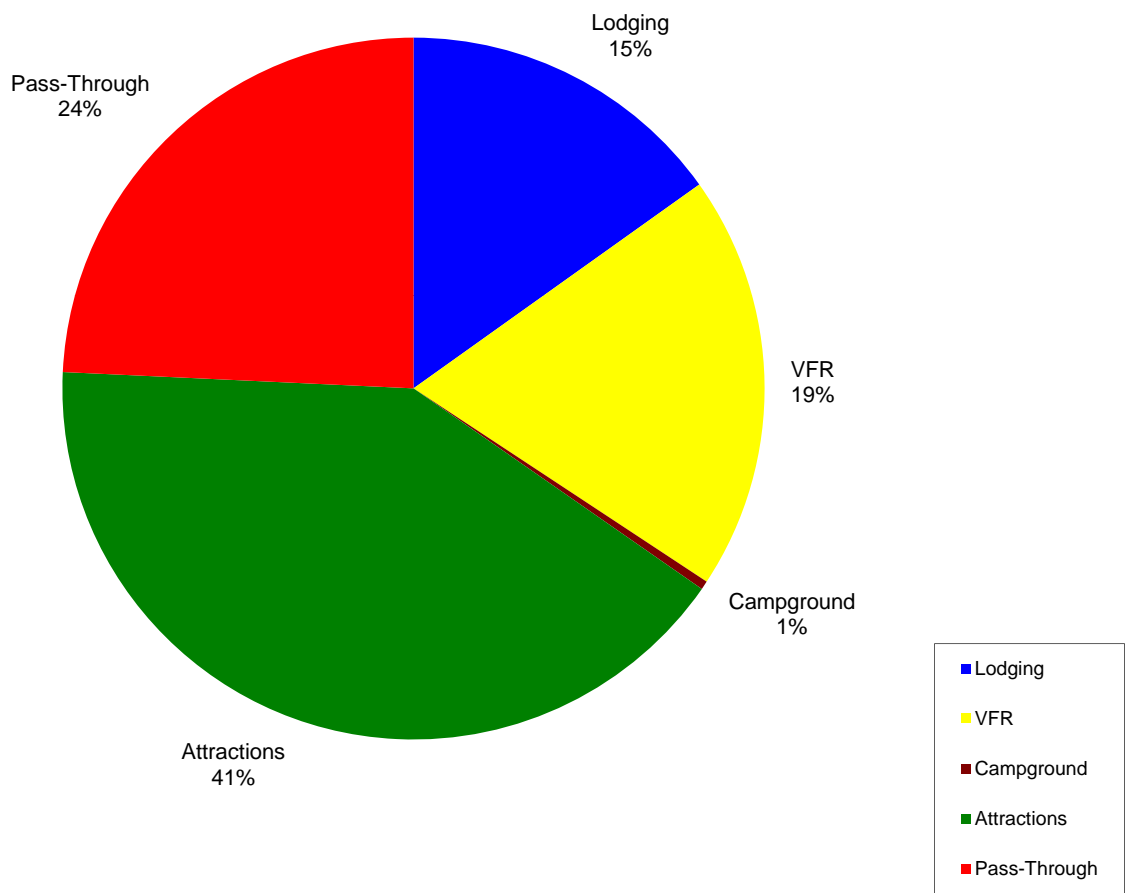
Certec designed surveys to collect business data from a stratified random sample of these businesses. The questionnaires are available in Appendix D. The information was collected through the South Bend/Mishawaka Convention and Visitors Bureau with the assistance of Shari Carroll, Director, Marketing and Program Development. Mail interviews were received from the owner and/or manager of each of those establishments during the period April through June 2010. The interview had as its primary focus the number of units sold (lodging rooms) or visitors to the facility. Complete interviews were obtained from 59.1 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 in 2009 exceeded 6.89 million—a slight increase over 2006. Attractions, after adjusting for multiple visits, accounted for over 41 percent of all visitor days, followed by pass-through travelers (24 percent). The VFR and lodging sectors also provided a substantial number of participant days—19 percent and 15 percent, respectively.

Destination travelers to St. Joseph County totaled over 4.0 million persons (4,068,083) compared to over 4.0 million (4,065,049) in 2006—a growth of 0.1 percent. In addition, nearly 1.7 million pass-through travelers visited the county (1,669,413) compared to 1,647,989 in 2006.

Chart 3

Total Participant Days -- 2009



Total Participant Days = 6,894,246

The information on participant days in Chart 3 in combination with the expenditure data in Chart 2 shows the importance of lodging guests and their much higher spending per person per day. Even though they account for slightly over three-fifths as many visitors to the county than does the pass-through sector, the spending impact of lodging guests on the local economy is more than double that of pass-through visitors. This relationship held in both 2006 and 2009.

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 South Bend/Mishawaka area 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 St. Joseph 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 multiplier 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 the South Bend/Mishawaka area tourism and travel industry presented in this report.

APPENDIX B

DEFINITION OF TERMS

Attraction	a historic site, museum, marina, outdoor recreation area, cultural site or activity, state or national park, entertainment venue, other facility or event such as fairs and festivals which serve to motivate non-local residents to visit a particular community/county
Direct Expenditure	the exchange of money or the promise of money for goods or services while traveling in St. Joseph 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; i.e. the multiplier effect.
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.
VFR	Visit to friends or relatives.

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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. They represent only the interviewing period. 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.

South Bend/Mishawaka derived a substantial majority of its visitation from three states during the interviewing period. These three states accounted for nearly three-fourths of the visitors to the county. The county also received visitation from a large number of other states.

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

1)	Michigan	35.0%
2)	Ohio	22.2
3)	Illinois	16.2

While these findings indicate that the county's strongest draw among travelers came from Michigan, Ohio, and Illinois the county does receive visitation from more distant locations such as New York, Kentucky, Georgia, Florida, Kansas, Minnesota, Missouri, and Colorado as well as from in-state visitors. In all, visitors from seventeen different states were identified in a sample of 117 travel parties.

Demographics

The typical visitor to the South Bend/Mishawaka area is most likely to be a college graduate [including post-graduates] (66 percent) and working in a professional/technical job (47 percent).

DEMOGRAPHICS OF VISITORS TO SOUTH BEND/MISHAWAKA

EDUCATION

College Graduate [Bachelors]	34.2%
Post Graduate [college]	32.5
Some College	22.8
High School Graduate	10.5

OCCUPATION

Professional/technical	47.2%
Laborer	11.1
Sales	10.2
Retired	9.2
Operative incl. Transport	8.3
Personal Service	6.5
Manager	2.8
Clerical	2.8
Craftsman	1.9

Trip Characteristics

The destination tourism business South Bend/Mishawaka enjoyed in the period studied is derived primarily from visitors in the area for a short trip of one to three nights in length (69.2%), a day trip (16.2%), or a vacation of four or more nights in length (9.4%). Over nine out of ten of the visitors interviewed were on one of these three trip types. Over ninety percent of those who spent the night stayed in motels (92.6%). Nationally, pleasure travel accounted for over 80 percent of the one billion plus trips in 2008. The remainder results from business travel.

Over three-fifths of these travelers to South Bend/Mishawaka (63.2%) are on their first visit to the county. This ranges from one out of two for attraction visitors to two out of three for motel guests. Overall, visitors have taken an average of 2.0 trips to the area in the past two years. The typical travel party has an average of 6.4 people. The average length of stay is 2.5 days.

The information sources mentioned by the respondents as most likely to be used when making travel plans include: the Internet (76.9 percent), friends and relatives (43.6 percent), a local visitor's bureau (6.0 percent), an auto club (6.0 percent), newspapers/magazines (5.1 percent), and a state tourism office (3.4 percent).

Travelers visited a number of attractions in the South Bend/Mishawaka area. On average a travel party visited 1.8 attractions. The most visited attractions by those interviewed were:

- University of Notre Dame
- College Football Hall of Fame

- Studebaker National Museum
- Amish Acres
- Baseball Tourney
- Shopping Malls
- Potawatomi Park Zoo
- History Center
- South Bend Chocolate Company
- Art Museum
- Goshen
- Restaurants

The most frequently mentioned activities that visitors participated in while in South Bend/Mishawaka were sports/recreation (33.3 percent), shopping (9.4 percent), wedding (7.7 percent), visiting friends and relatives (6.8 percent), dining (5.1 percent), movies (2.5 percent), and visit museums (1.7 percent). On average a travel party participated in 1.3 activities.

APPENDIX D

Business Questionnaires

Office Use Only
County _____
Interview _____
INCVB09

INDIANA HOTEL/MOTEL QUESTIONNAIRE

Please answer the following questions and return this sheet to Certec Inc. in the enclosed business return envelope by **June 7, 2010.**

- 1. Number of rooms sold during entire year - 2009. _____
- 2. Average number of guests per room - 2009. _____
- 3. Estimated proportion of guests from outside St. Joseph Co.____
- 4. Number of rooms at facility at beginning of 2009. _____

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 **June 7, 2010.**

- 1. Number of rooms sold during entire year - 2009. _____
- 2. Average number of guests per room - 2009. _____
- 3. Estimated proportion of guests from outside St. Joseph Co. ____
- 4. Number of guest rooms at facility at beginning of 2009. _____

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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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 **June 7, 2010.**

1. Number of visitors to attraction during entire year-2009 _____
2. Estimated proportion of visitors from outside St. Joseph 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.

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Office Use Only
County _____
Interview _____
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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 **June 7, 2010.**

1. Number of camper nights sold during entire year - 2009. _____
2. Average number of campers per site - 2009. _____
3. Estimated proportion of campers from outside St. Joseph Co ____
4. Number of improved sites at facility at beginning of 2009 ____

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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APPENDIX E

Visitor Questionnaire

South Bend/Mishawaka/St. Joseph County Tourism Questionnaire

Thank you for taking the few minutes needed to answer the following questions concerning your trip to the South Bend area. **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 St. Joseph County in the past two years?
 1. First Visit
 2. _____ [record total number of visits if more than one]
 3. Local resident of St. Joseph 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 the South Bend/Mishawaka Area?
 1. Hotel or motel - which one? _____
 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 the South Bend area 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. What 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 St. Joseph County while on this trip to the area. The northern boundary of St. Joseph County stretches along Indiana's boundary with Michigan. The county extends from New Carlisle in the west to **South Bend** in the county's center to Mishawaka in the east. Granger is the northern part of the county and North Liberty is in the southern part.

10. Please provide the **expenditures** that your travel party has made or will make in **South Bend/St. Joseph 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 only)
 - \$_____ 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
 2. High school graduate
 3. Some college
 4. College graduate
 5. College post-graduate studies
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)

**SOUTH BEND/MISHAWAKA AREA TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2004 AND 2006**

	2004	2006
Total Expenditures	\$524,516,542	\$587,116,897
Direct Expenditures	\$337,244,610	\$377,494,308
Indirect Expenditures	\$187,271,932	\$209,622,589
Change Between 2004 and 2006 (Direct Expenditures Only)		6.0%
Change Between 2004 and 2006 (Adjusted for Inflation)		2.9%
Total Wages	\$112,395,799	\$125,222,972
Total Taxes	\$132,291,536	\$148,080,356
State	\$ 47,894,423	\$ 53,610,559
Local	\$ 25,808,223	\$ 28,888,400
Federal	\$ 58,588,890	\$ 65,581,397
Total Employment	7,826	8,302
Jobs (Direct Expenditures)	5,683	6,029
Jobs (Indirect Expenditures)	2,143	2,273

**Certec Inc.
Lexington, KY**

**SOUTH BEND/MISHAWAKA AREA TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2002 AND 2004**

	2002	2004
Total Expenditures	\$491,800,493	\$524,516,542
Direct Expenditures	\$308,300,209	\$337,244,610
Indirect Expenditures	\$183,500,284	\$187,271,932
Change Between 2002 and 2004 (Direct Expenditures Only)		4.7%
Change Between 2002 and 2004 (Adjusted for Inflation)		1.6%
Total Wages	\$103,909,322	\$112,395,799
Total Taxes	\$124,040,020	\$132,291,536
State	\$ 44,907,070	\$ 47,894,423
Local	\$ 24,198,468	\$ 25,808,223
Federal	\$ 54,934,482	\$ 58,588,890
Total Employment	7,664	7,826
Jobs (Direct Expenditures)	5,458	5,683
Jobs (Indirect Expenditures)	2,206	2,143

**Certec Inc.
Lexington, KY**

**SOUTH BEND/MISHAWAKA AREA TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2000 AND 2002**

	2000	2002
Total Expenditures	\$454,870,345	\$491,800,493
Direct Expenditures	\$285,149,414	\$308,300,209
Indirect Expenditures	\$169,720,931	\$183,500,284
Change Between 2000 and 2002 (Direct Expenditures Only)		4.1%
Change Between 2000 and 2002 (Adjusted for Inflation)		1.3%
Total Wages	\$ 97,925,988	\$103,909,322
Total Taxes	\$119,608,674	\$124,040,020
State	\$ 41,534,921	\$ 44,907,070
Local	\$ 22,381,363	\$ 24,198,468
Federal	\$ 55,692,390	\$ 54,934,482
Total Employment	7,447	7,664
Jobs (Direct Expenditures)	5,304	5,458
Jobs (Indirect Expenditures)	2,143	2,206

**SOUTH BEND/MISHAWAKA AREA TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2000**

Total Expenditures	\$454,870,345
Direct Expenditures	\$285,149,414
Indirect Expenditures	\$169,720,931
Total Wages	\$ 97,925,988
Total Taxes	\$119,608,674
State	\$ 41,534,921
Local	\$ 22,381,363
Federal	\$ 55,692,390
Total Employment	7,447
Jobs (Direct Expenditures)	5,304
Jobs (Indirect Expenditures)	2,143