

**ECONOMIC IMPACT OF THE HENDRICKS COUNTY
TOURISM AND TRAVEL INDUSTRY - 2007 AND 2009**

Prepared for:

**Hendricks County
Convention & 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 Hendricks County tourism and travel industry, as well as the industry structure, has been conducted for the Hendricks County Convention & Visitors Bureau. The major findings of the 2009 study follow:

- The tourism and travel industry contributed nearly \$192.3 million to Hendricks County's economy in 2009 compared to \$174.8 million in 2007. Direct expenditures by tourists accounted for \$136.6 million of this total – an annual real growth of 3.3 percent.
- The tourism industry generated over \$45.9 million in tax revenues to government - \$16.6 million to the state, \$9.0 million locally, and \$20.3 million to the federal government. Total taxes in 2007 were \$41.8 million.
- Residents of Hendricks County spent an additional \$34.4 million with the local tourism industry. This direct spending created 529 jobs.
- A total of 2,679 jobs in Hendricks County resulted from the industry in 2009 compared to 2,581 in 2007. Direct expenditures created 2,098 of these jobs.
- Over one-third of the jobs created were in high wage occupations.
- The tourism-generated jobs provided over \$41.1 million in wages to Hendricks County workers compared to \$37.4 million in 2007.
- Destination travelers to the county totaled nearly 2.0 million persons. Over 449,000 pass-through travelers also stopped briefly. These visitors generated over 2.9 million participant days when length of stay is taken into account.
- Expenditures by category showed that food and beverage, attraction, and shopping purchases accounted for over seven of every ten dollars spent.
- Expenditures by industry sector reflected the importance of the attractions and lodging sectors to the local tourism industry. Over three-fifths 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 Hendricks County tourism and travel industry in 2009 and show any changes since 2007. Economic benefits begin when a traveler to Hendricks County, 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 Hendricks 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 is a large, growing business in Hendricks County.** The research findings presented in this report show the importance of tourism to the local economy in 2007 and 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

**HENDRICKS COUNTY TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2007 AND 2009**

	<u>2007</u>	<u>2009</u>
Total Expenditures	\$174,793,754	\$192,298,439
Direct Expenditures	\$124,125,660	\$136,556,199
Indirect Expenditures	\$ 50,668,094	\$ 55,742,240
Change Between 2007 and 2009 (Direct Expenditures Only)		5.0%
Change Between 2007 and 2009 (Adjusted for Inflation)		3.3%
Total Wages	\$ 37,362,755	\$ 41,104,440
Total Taxes	\$ 41,765,500	\$ 45,948,097
State	\$ 15,120,654	\$ 16,634,909
Local	\$ 8,147,863	\$ 8,963,829
Federal	\$ 18,496,983	\$ 20,349,359
Total Employment	2,581	2,679
Jobs (Direct Expenditures)	2,021	2,098
Jobs (Indirect Expenditures)	560	581

ECONOMIC IMPACT OF TOURISM

Expenditures

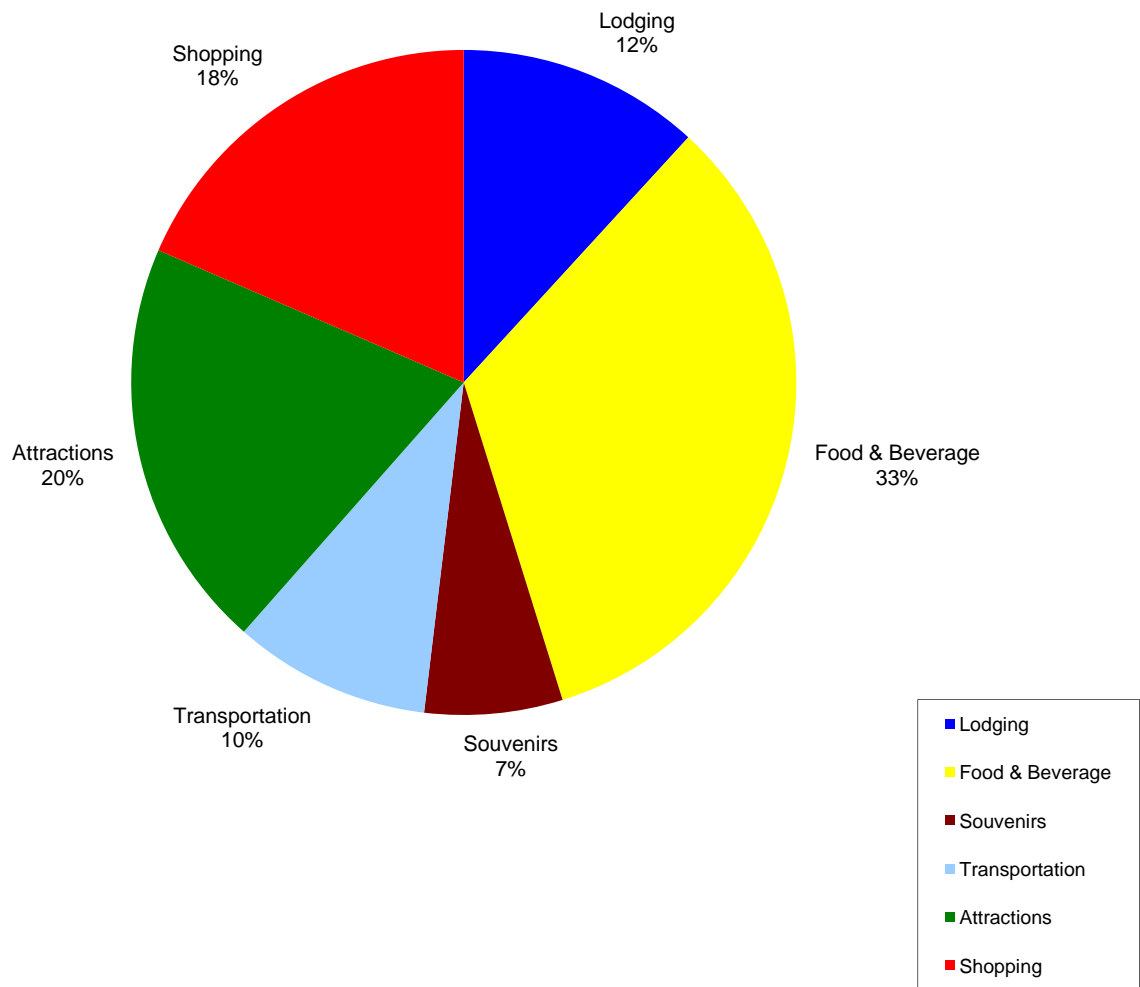
The tourism and travel industry made a total contribution to Hendricks County's economy of \$192.3 million in 2009 (Table 1). The purchases made by travelers while in the county accounted for \$136.6 million of this total. This represents an annual increase in spending of 5.0 percent over 2007 levels. After adjusting for inflation between the two years, the annual real growth in spending is 3.3 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 \$136.6 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 \$55.7 million.

The expenditure data were further classified by type of purchase. The countywide distribution of these expenditures is provided in Chart 1. Spending on food and beverage accounted for over 33 percent of these \$136.6 million in direct purchases—up from 32% in 2007. Attractions accounted for 20 percent of all travel expenditures. Shopping and lodging collected 18 percent and 12 percent of the total, respectively. Lodging was at 15 percent in 2007. Transportation accounted for ten percent of the purchases and souvenirs seven percent.

Chart 1

Travel Expenditures by Category



Total Expenditures = \$136,556,199

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Where does this money go once it is in the Hendricks 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 Hendricks 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.

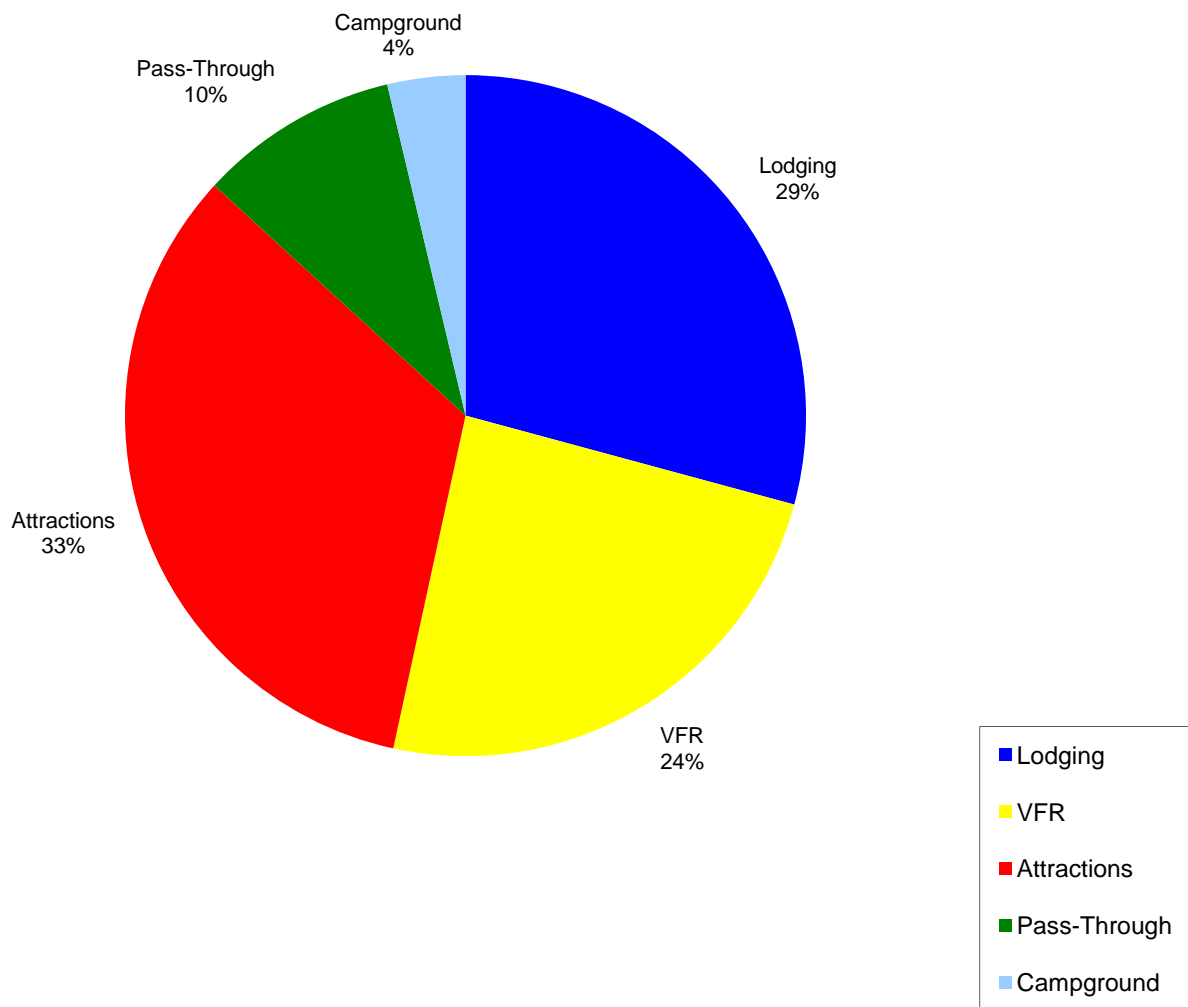
Expenditures by Sector

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 33 percent of these \$136.6 million in purchases—up from 28 percent in 2007. Lodging guests accounted for the next largest share of this spending (over 29 percent)—down from 33 percent in 2007. Those visiting friends and relatives in the county followed with over 24 percent of the total spending. Individuals passing through the county contributed ten percent. Campers provided four percent.

The importance of the attractions and lodging sectors to tourism spending in Hendricks are substantial. They are the cornerstones of the area's tourism industry. The attractions sector, in particular, grew substantially between 2007 and 2009 while lodging decreased slightly. Their growth is the key to a healthy tourism industry in Hendricks County. The volume of traffic passing through the area on Interstates 70 and 74 also makes an important contribution with food and beverage, gasoline, and other retail store purchases.

Chart 2

Travel Expenditures by Industry Sector



Total Expenditures = \$136,556,199

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Employment

In 2009, a total of 2,679 jobs (in FTEs [full time equivalents]) in Hendricks County were due to the expenditures made in the tourism and travel industry (Table 1)—an increase of 98 jobs. These represent nearly four percent of all jobs in the county in 2009. The 2009 direct expenditures of travelers accounted for 2,098 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 travelers in the attractions sector lead the industry in job creation. The expenditures of the visitors within this sector generated 903 jobs—an increase of 163 jobs. It was followed, in turn, by the lodging sector (794 jobs)—a decrease of 73 jobs, the VFR [visits to friends and relatives] sector (635 jobs)—an increase of four jobs, and the pass-through sector (249 jobs)—an increase of six jobs. The campground sector provided 98 jobs.

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

Table 2

TOURISM GENERATED EMPLOYMENT BY OCCUPATION

<u>Occupation</u>	<u>Jobs</u>
Professional & technical	124
Managerial	190
Marketing & sales	266
Administrative support	313
Construction	48
Craftsman	154
Agriculture & forestry	45
Operatives & fabricators	139
Laborers	94
Personal services	1,306
Total	2,679

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 Hendricks 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 \$41.1 million in 2009 (Table 1)—an increase of \$3.7 million over 2007. The direct purchases of travelers accounted for over \$29.2 million of this total.

Taxes

Tourism generates state and local as well as federal tax revenues. Hendricks County tourism expenditures resulted in the collection of over \$45.9 million in tax revenues in 2009 (Table 1) compared to \$41.8 million in 2007. Over two-fifths (\$20.3 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 \$16.6 million in tax revenues generated by tourism activity within the county compared to \$15.1 million in 2007. A major portion of these revenues were obtained through sales and excise taxes, and taxes on individual and corporate income.

Local government operations in Hendricks County such as the cities and towns, county government, and the Convention & Visitors Bureau also benefited from tourism in the county. County and municipal governments received over \$9.0 million in tax revenues as a result of the tourism industry compared to \$8.1 million in 2007. Property tax, business taxes, and the innkeeper's 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-Hendricks County residents is included in this research. Locals contributed an additional \$34.4 million in direct spending to the local tourism industry and generated 529 jobs (see page 14 – Direct Effects).**

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 Hendricks County is currently available for 2007 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. For each sector, the expenditure figure includes purchases for lodging (excluding attractions, VFR, and pass through), food & beverage, transportation, souvenirs, attractions, and shopping/retail)

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

	<u>2007</u>	<u>2009</u>
Lodging	\$81.71	\$82.70
attractions	\$34.61	\$36.83
VFR	\$47.77	\$49.90
pass through	\$27.74	\$28.84
campground	\$44.32	\$45.92

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Participant Days

Hendricks County is divided into tourism sectors. Certec identified tourism and travel businesses operating in 2009 from a review of local tourism publications. This information was used to update the 2007 database developed for the previous year's study.

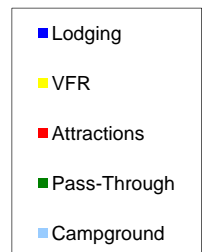
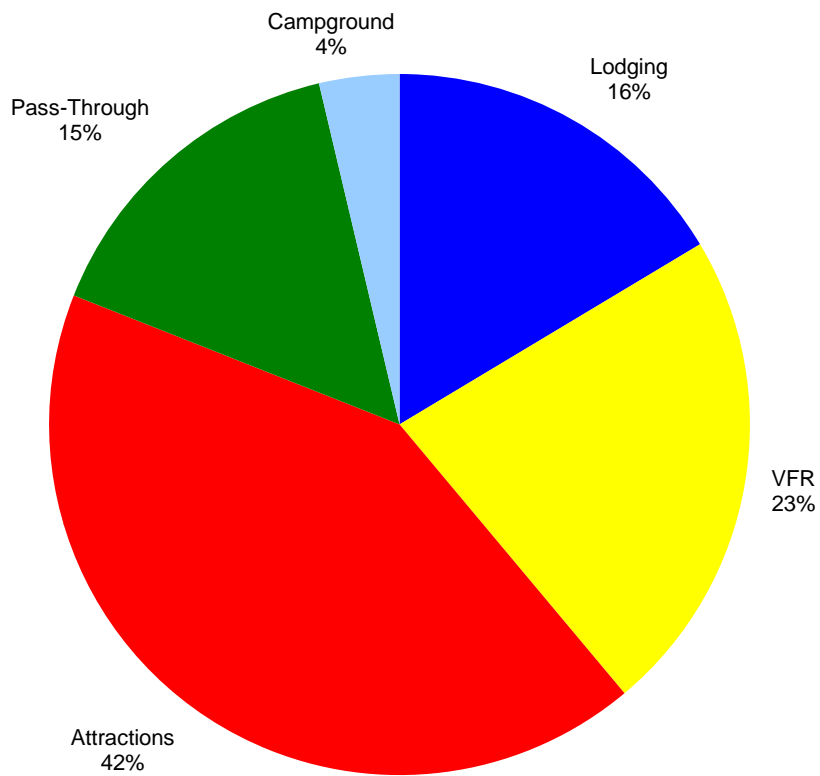
Certec designed surveys to collect business data from a stratified random sample of these businesses. The questionnaires are available in Appendix D. The information was collected through the Hendricks County Convention & Visitors Bureau with the assistance of Jaime Bohler Smith, Associate Director. Mail interviews were received from the owner and/or manager of each of those establishments during the period March through June 2010. The interview had as its primary focus the number of units sold (lodging rooms or campsites) or visitors to the facility. Complete interviews were obtained from 68.0 percent of the businesses in the sample, up from 66.7 percent in 2007.

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 Hendricks County in 2009 exceeded 2.9 million. Attractions, after adjusting for multiple visits, accounted for over 42 percent (up from 38 percent in 2007) of all visitor days followed by VFR travelers (23 percent). The lodging and pass-through sectors also provided a substantial number of participant days—16 percent and 15 percent, respectively.

Destination travelers to Hendricks County totaled nearly 2.0 million persons (1,963,492) compared to 1.7 million (1,768,080) in 2007. In addition, over 449 thousand pass-through travelers (449,257) visited the county compared to 430 thousand (430,117) in 2007.

Chart 3

Total Participant Days -- 2009



Total Participant Days = 2,943,510

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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 just under two-fifths as many visitors to the county than does the attractions sector, the spending impact of lodging guests on the local economy is only slightly less 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 Hendricks 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.

The data collected from the business questionnaires also allowed for the calculation of the direct effects of the local residents. The business survey asked for the proportion of visitors/patrons from outside Hendricks County. The remainder would be local residents who used local tourism facilities. These data were used in the Model with the expenditure data to calculate spending which could then be translated into jobs created by the spending.

Multiplier Effects

The indirect and induced expenditures resulting from the initial infusion of money into the Hendricks 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 Hendricks County 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 Hendricks 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.
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.

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

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

1)	Indiana	39.2%
2)	Illinois	11.3
3)	Ohio	10.3

While these findings indicate that the county's strongest draw among travelers comes from Indiana, Illinois and nearby states, the county does receive visitation from more distant locations such as Kentucky, Georgia, Kansas, Wisconsin, Michigan, Missouri, New York, and North Carolina. In all, visitors from twenty different states were identified.

Demographics

The typical visitor to the Hendricks area is most likely to be a college graduate (51.1 percent) and working in a professional/technical job (50.5 percent). Another one out of seven visitors is a manager (14.3%).

DEMOGRAPHICS OF VISITORS TO HENDRICKS COUNTY

EDUCATION

College Graduate	29.8%
Some College	27.6
Post Graduate	21.3
High School Graduate	21.3

OCCUPATION

Professional/technical	50.5%
Manager	14.3
Retired	9.9
Construction	7.7
Sales	5.5
Laborer	5.5
Clerical	3.3
Operative	2.2
Craftsman	1.1

Trip Characteristics

The destination tourism business Hendricks County enjoys is derived primarily from visitors on either a short trip (39.2%) of one to three nights in length or a day trip (22.7%). One in ten was on a vacation of four or more nights in length (10.3%). Nine in ten (88.7%) of those who spent the night on this trip, i.e. excluding day visitors, stayed in motels. Nationally, pleasure travel accounted for over 80 percent of the one billion plus trips in 2008. The remainder results from business travel.

Nearly three in ten of these travelers to the county (28.9%) are on their first visit to the county. This ranges from one out of twenty for attraction visitors to three out of eight for motel guests. Overall, visitors have taken an average of 6.0 trips to the area in the past two years—a high level of repeat visitation. The typical travel party has an average of 2.8 people. The average length of stay is 1.9 days.

The information sources mentioned by the respondents as most likely to be used when making travel plans include (in rank order): the Internet (70.1 percent), friends and relatives (43.3 percent), newspapers (11.3 percent), magazines (9.3 percent), an auto club (7.2 percent), a local visitors bureau (6.2 percent), a travel agent (5.2 percent) and a state tourism office (1.0 percent).

Travelers visited a number of attractions in the Hendricks County area. On average a travel party visited 1.4 attractions. The most visited attractions by those interviewed were:

- Indianapolis Motor Speedway (NASCAR)
- O'Reilly Raceway Park
- Metropolis
- Chateau Thomas Winery
- Shopping (general)
- Visit Friends or Relatives
- Local Restaurants
- Local Parks

The most frequently mentioned activities that visitors participated in while in Hendricks County were watching auto racing (20.6 percent), shopping (20.6), dining (19.6 percent),

visiting friends or relatives (8.2 percent), music concert (5.2 percent), and wedding (4.1 percent). Visitors participated in an average of 1.3 activities.

APPENDIX D

Business Questionnaires

**Certec Inc.
Lexington, KY**

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 **April 23, 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 Hendricks 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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Lexington, KY**

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Interview _____
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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 **April 23, 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 Hendricks 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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Lexington, KY**

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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 23, 2010**.

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

Certec Inc.
Lexington, KY

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 **April 23, 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 Hendricks 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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Lexington, KY

APPENDIX E

Visitor Questionnaire

**Certec Inc.
Lexington, KY**

Hendricks County Tourism Questionnaire

Thank you for taking the few minutes needed to answer the following questions concerning your trip to Hendricks County. **Please complete the survey 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 Hendricks County in the past two years?
 1. First Visit
 2. _____ [record total number of visits if more than one]
 3. Local resident of Hendricks 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 Hendricks County?
 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 Hendricks 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 see 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 Hendricks County while on this trip to the area. The county stretches from Brownsburg (near I-74) in the northern part of the county to Danville in the county's center to Plainfield (near I-70) in the southern part of the county.

10. Please provide the **expenditures** that your travel **party has made or will make in Hendricks 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
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)

**HENDRICKS COUNTY TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2003 AND 2007**

	<u>2003</u>	<u>2007</u>
Total Expenditures	\$126,278,098	\$174,793,754
Direct Expenditures	\$ 89,673,412	\$124,125,660
Indirect Expenditures	\$ 36,604,686	\$ 50,668,094
 Change Between 2003 and 2007 (Direct Expenditures Only)		9.6%
 Change Between 2003 and 2007 (Adjusted for Inflation)		5.6%
 Total Wages	\$ 26,992,370	\$ 37,362,755
Total Taxes	\$ 30,173,091	\$ 41,765,500
State	\$ 10,923,774	\$ 15,120,654
Local	\$ 5,886,346	\$ 8,147,863
Federal	\$ 13,362,971	\$ 18,496,983
 Total Employment	1,978	2,581
Jobs (Direct Expenditures)	1,549	2,021
Jobs (Indirect Expenditures)	429	560

**Certec Inc.
Lexington, KY**

**HENDRICKS COUNTY TOURISM AND
TRAVEL INDUSTRY ECONOMIC IMPACT - 2003**

Total Expenditures	\$126,278,098
Direct Expenditures	\$ 89,673,412
Indirect Expenditures	\$ 36,604,686
Total Wages	\$ 26,992,370
Total Taxes	\$ 30,173,091
State	\$ 10,923,774
Local	\$ 5,886,346
Federal	\$ 13,362,971
Total Employment	1,978
Jobs (Direct Expenditures)	1,549
Jobs (Indirect Expenditures)	429

**Certec Inc.
Lexington, KY**