

The Economic Impact of Travel

Dawes & Sioux County, Nebraska

2021 Preliminary Estimates

May 2022

PREPARED FOR
Dawes County Travel Board



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2021 Preliminary Estimates

Dawes County Travel Board

5/9/2022

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Photo: Dawes County Travel Board (Modified by Dean Runyan Associates)

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Dawes & Sioux Counties

2021p

Dawes & Sioux County / Summary

Travel Impacts 2021p

Northwest Nebraska (Dawes & Sioux County) offers a variety of outdoor recreation opportunities that includes hunting, fishing, wildlife viewing, camping, hiking, and horseback riding. Public lands include Box Butte State Recreation Area, Whitney Lake, Chadron State Park, and Fort Robinson State Park. Local museums chronicle pioneer history and the fossil record in Northwest Nebraska.

During 2021, Nebraska as a whole continued to recover much of what was lost in 2020. Strong demand for overnight accommodations and increased commodity prices led to large gains in visitor spending. Nebraska travel spending grew an estimated 68% in 2021.

- Travel spending in Dawes & Sioux County increased 72.6% from \$17.7 million in 2020 to \$30.6 million in 2021.
- Direct travel-generated employment gained approximately 10 jobs, a 4.0% increase in travel-generated employment.
- Direct travel-generated earnings grew 9.7% in 2021.
- Tax receipts generated by travel spending are up 57.5% compared to 2020.

Nebraska's travel industry grew by 68% in 2021, as Dawes & Sioux County's travel economy increased 73%.

Note: These estimates for 2021 are subject to revision as more complete data become available.

Photo: Dawes Travel Board - Brandon Davenport (Modified by Dean Runyan Associates)



Dawes & Sioux County / Summary Table

Direct Travel Impacts 2012-2021p

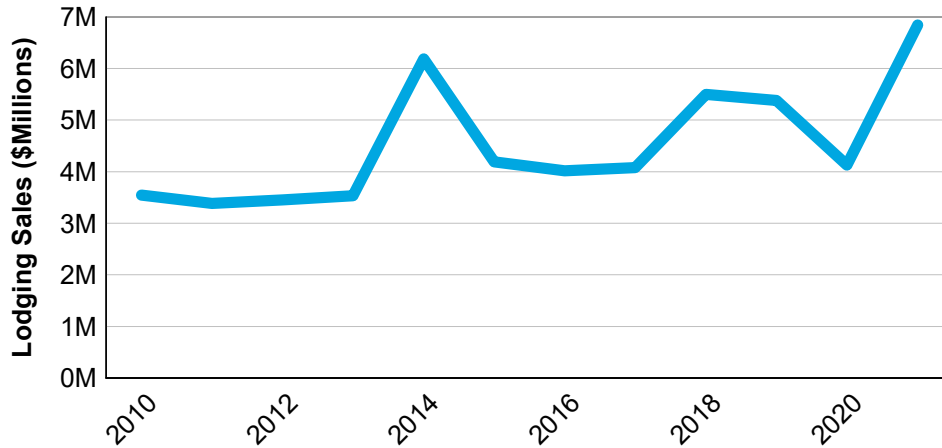
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Avg. Annual % Chg.	
											2020-21	2012-21
Spending (\$Millions)												
Total (Current \$)	19.5	19.6	25.7	19.1	18.6	18.8	24.3	23.2	17.7	30.6	▲ 72.6%	▲ 5.1%
Other	0.2	0.4	0.1	0.3	0.6	0.7	0.7	0.8	0.4	0.5	▲ 31.8%	▲ 9.8%
Visitor	19.3	19.2	25.5	18.8	18.0	18.2	23.5	22.5	17.3	30.0	▲ 73.5%	▲ 5.0%
Earnings (\$Millions)												
Earnings (Current \$)	3.7	3.7	5.8	4.3	4.2	4.4	5.1	4.9	4.1	4.5	▲ 9.7%	▲ 2.4%
Employment (Jobs)												
Employment	270	280	440	320	310	320	360	330	250	260	▲ 0.8%	▼ -0.6%
Tax Revenue (\$Millions)												
Total (Current \$)	1.5	1.5	2.1	1.7	1.7	1.7	2.1	2.0	1.6	2.6	▲ 57.5%	▲ 6.7%
Local	0.2	0.3	0.4	0.4	0.4	0.4	0.5	0.5	0.4	0.6	▲ 70.9%	▲ 12.6%
State	1.2	1.2	1.7	1.3	1.3	1.3	1.6	1.6	1.3	2.0	▲ 53.6%	▲ 5.3%

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.



Dawes & Sioux County / Travel Activity Trends

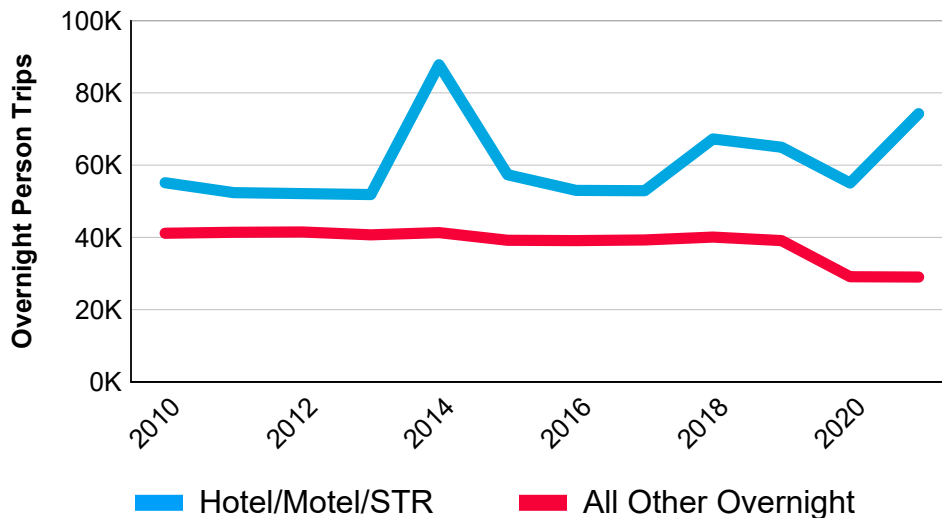
Taxable Lodging Sales



Lodging sales in Dawes and Sioux County increased from \$4.1 million in 2020 to \$6.8 million in 2021, a increase of 65.7%.

Sources: Nebraska Department of Revenue, Dean Runyan Associates

Overnight Volume

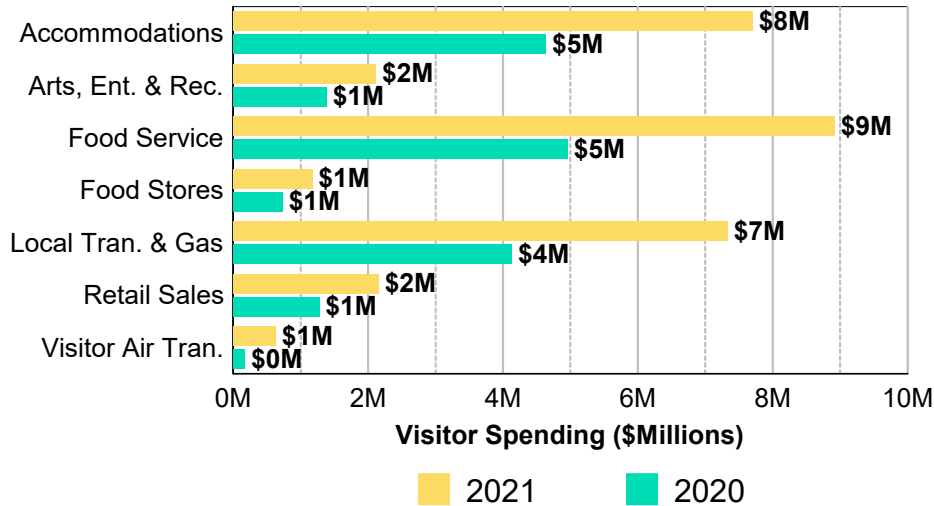


Overnight person-trips increased from 84 thousand in 2020 to 103 thousand in 2021, a increase of 22.8%.

Sources: Nebraska Department of Revenue, Dean Runyan Associates, STR LLC., KeyData Dashboard

Dawes & Sioux County / Spending

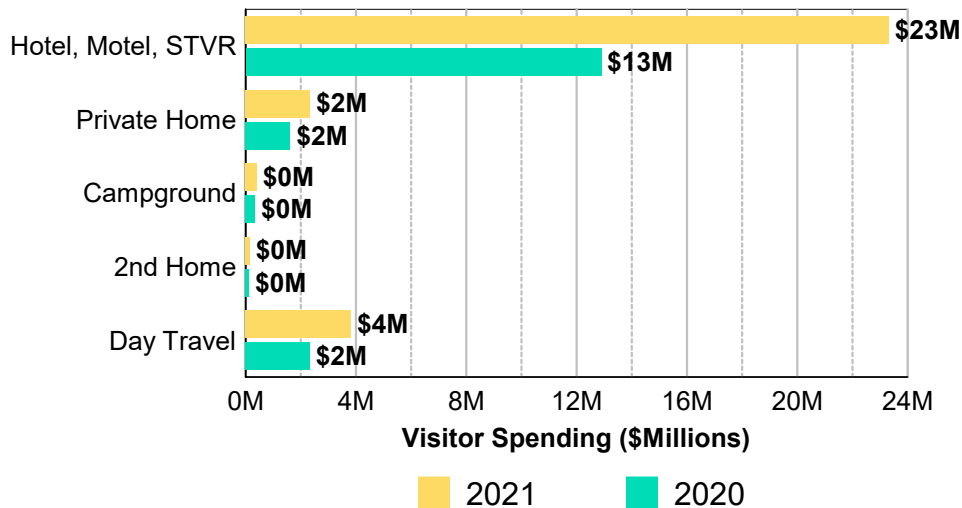
Visitor Spending by Commodity Purchased



The largest gain occurred in Food Service -- \$3.9 million more in travel spending was added in 2021 compared to 2020, an increase of 79.8%.

Sources: Dean Runyan Associates, Omnitrak Group

Visitor Spending by Accommodation Type



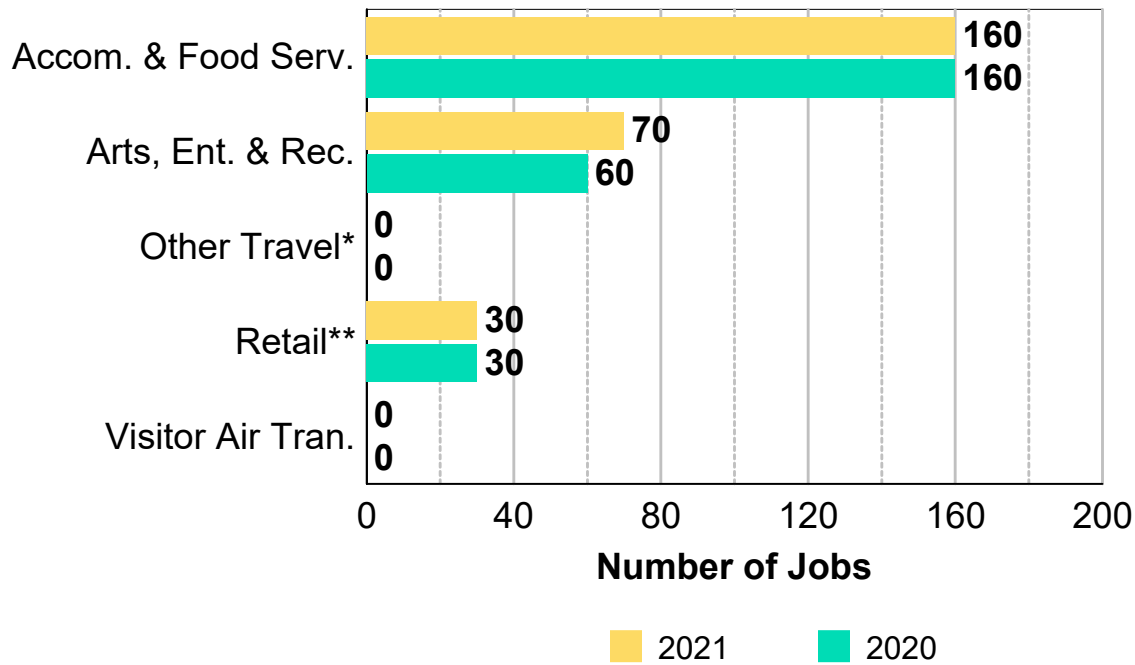
Visitors who stayed in a Hotel, Motel, or STVR spent \$23.3 million in 2021, a increase of 80.8%.

Sources: Nebraska Department of Revenue, Dean Runyan Associates, Omnitrak Group, STR LLC., KeyData Dashboard

Note: Private Home represents visitors staying with friends or family. (Glossary on page 17)

Dawes & Sioux County / Employment

Travel Industry Employment



**Retail includes gasoline station employment.
 *Other travel includes travel arrangement services.

Direct travel industry employment was 260 jobs in 2021. Overall, travel industry employment experienced an increase of 4.0%.

Sources: Dean Runyan Associates, Bureau of Labor Statistics, Bureau of Economic Analysis
 Photo: Dawes County Travel Board (Modified by Dean Runyan Associates)



Dawes & Sioux County / Detailed Table

Direct Travel Impacts 2012-2021p

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2020-2021
Direct Travel Spending (\$Million)											
Destination Spending	19.3	19.2	25.5	18.8	18.0	18.2	23.5	22.5	17.3	30.0	▲ 73.5%
Other Travel*	0.2	0.4	0.1	0.3	0.6	0.7	0.7	0.8	0.4	0.5	▲ 31.8%
TOTAL	20.0	20.0	25.7	19.1	18.6	18.8	24.3	23.2	17.7	30.6	▲ 72.6%
Visitor Spending by Type of Traveler Accommodation (\$Million)											
Hotel, Motel, STVR	12.8	12.9	19.3	13.2	12.4	12.7	17.1	16.5	12.9	23.3	▲ 80.8%
Private Home	2.9	2.8	2.3	2.4	2.6	2.4	2.8	2.5	1.6	2.3	▲ 43.6%
Campground	0.5	0.5	0.3	0.4	0.3	0.4	0.4	0.4	0.3	0.4	▲ 19.3%
2nd Home	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	▲ 17.6%
Day Travel	3.0	2.9	3.5	2.7	2.5	2.6	3.1	3.0	2.3	3.8	▲ 64.8%
TOTAL	19.0	19.0	25.5	18.8	18.0	18.2	23.5	22.5	17.3	30.0	▲ 73.5%
Visitor Spending by Commodity Purchased (\$Million)											
Accommodations	3.8	3.9	6.9	4.8	4.6	4.6	6.2	6.1	4.6	7.7	▲ 66.0%
Food Service	4.2	4.3	6.7	4.9	4.7	4.8	5.9	5.9	5.0	8.9	▲ 79.8%
Food Stores	0.8	0.8	1.1	0.8	0.8	0.8	0.9	0.9	0.7	1.2	▲ 60.4%
Local Tran. & Gas	7.4	7.2	6.7	5.0	4.4	4.9	6.6	6.1	4.1	7.3	▲ 77.5%
Arts, Ent. & Rec.	1.3	1.3	2.1	1.4	1.3	1.4	1.7	1.6	1.4	2.1	▲ 52.3%
Retail Sales	1.5	1.5	2.0	1.5	1.4	1.4	1.6	1.6	1.3	2.2	▲ 68.7%
Visitor Air Tran.	0.4	0.3	0.2	0.4	0.7	0.3	0.7	0.4	0.2	0.6	▲ 260.3%
TOTAL	19.0	19.0	25.5	18.8	18.0	18.2	23.5	22.5	17.3	30.0	▲ 73.5%

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

*Other Travel includes resident spending on travel arrangement services.

Note: Private Home represents visitors staying with friends or family. (Glossary on page 17)

Dawes & Sioux County / Detail

Direct Travel Impacts 2012-2021p

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2020-2021
Travel Industry Earnings (\$Million)											
Accom. & Food Serv.	2.4	2.4	3.9	2.8	2.7	2.9	3.2	3.1	2.4	2.6	▲ 5.2%
Arts, Ent. & Rec.	0.8	0.8	1.2	0.9	0.8	0.9	1.1	1.1	0.9	1.0	▲ 19.4%
Retail**	0.5	0.5	0.7	0.6	0.6	0.6	0.7	0.7	0.8	0.9	▲ 13.7%
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	▲ 71.8%
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	▼ -37.3%
TOTAL	4.0	4.0	6.0	4.3	4.2	4.4	5.1	4.9	4.1	4.5	▲ 9.7%
Travel Industry Employment (Jobs)											
Accom. & Food Serv.	190	190	310	220	210	220	240	220	160	160	▼ -3.3%
Arts, Ent. & Rec.	60	60	100	70	60	70	80	80	60	70	▲ 9.6%
Retail**	30	30	30	30	30	30	30	30	30	30	▲ 6.2%
Visitor Air Tran.	<10	<10	<10	<10	<10	<10	<10	<10	<10	<10	▲ 57.7%
Other Travel*	<10	<10	<10	<10	<10	<10	<10	<10	<10	<10	▼ -42.5%
TOTAL	270	280	440	320	310	320	360	330	250	260	▲ 4.0%
Tax Receipts Generated by Travel Spending (\$Million)											
Local Tax Receipts	0.2	0.3	0.4	0.4	0.4	0.4	0.5	0.5	0.4	0.6	▲ 70.9%
State Tax Receipts	1.2	1.2	1.7	1.3	1.3	1.3	1.6	1.6	1.3	2.0	▲ 53.6%
TOTAL	1.0	1.0	2.0	1.7	1.7	1.7	2.1	2.0	1.6	2.6	▲ 57.5%

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

**Retail includes gasoline. *Other Travel includes travel arrangement services.



Dawes & Sioux County / Overnight Visitor Details

Overnight Visitor Volume and Average Spending

Overnight visitor volume for the Dawes & Sioux County region is based on cross-referencing visitor surveys and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor Spending is a more reliable metric to Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

Average Expenditure for Overnight Visitors, 2021p


	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$180	\$314	\$331	\$572	1.8	1.7
Private Home	\$36	\$100	\$101	\$279	2.8	2.8
Other Overnight	\$40	\$99	\$80	\$201	2.0	2.5
All Overnight	\$238	\$480	\$492	\$954	2.1	1.9

Overnight Visitor Volume, 2019-2021p

	Person-Trips			Party-Trips		
	2019	2020	2021	2019	2020	2021
Hotel, Motel, STVR	64,900	55,000	74,300	26,600	22,600	40,800
Private Home	34,500	24,400	23,400	12,300	8,700	8,400
Other Overnight	4,700	4,700	5,600	2,300	2,300	2,800
All Overnight	104,000	84,100	103,300	41,300	33,600	51,900

	Person-Nights			Party-Nights		
	2019	2020	2021	2019	2020	2021
Hotel, Motel, STVR	111,400	94,400	129,300	45,700	38,700	70,600
Private Home	73,900	52,300	64,600	26,400	18,700	23,100
Other Overnight	11,700	11,700	14,100	5,800	5,800	7,000
All Overnight	196,900	158,400	207,900	77,900	63,200	100,600

Note: Private Home represents visitors staying with friends or family. (Glossary on page 17)



72%
Hotel, Motel, STR
share of overnight
person-trips

Dawes & Sioux County / Secondary Effects

Travel spending brings money into the region in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-related revenues creates indirect and induced impacts.

Direct impacts represent effects attributable to traveler expenditures.

Indirect impacts represent effects associated with industries that supply goods and services to the direct businesses.

Induced impacts represent effects of purchases made by employees in both the direct and indirect businesses.

The impacts in this section are presented in eleven major industry groups. These industry groups are similar, but not identical to the business categories presented elsewhere in this report. (The specific industries that comprise these groups are listed in Implan/Secondary Effects.)

It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire county and do not necessarily reflect economic patterns for individual cities within the county. In general, geographic areas with lower levels of economic activity will have smaller secondary impacts within those same geographic boundaries.

Largest Secondary Industries 2021p

Professional Services (15 jobs and \$200 thousand in earnings) A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses. Employees of these businesses also purchase professional services.

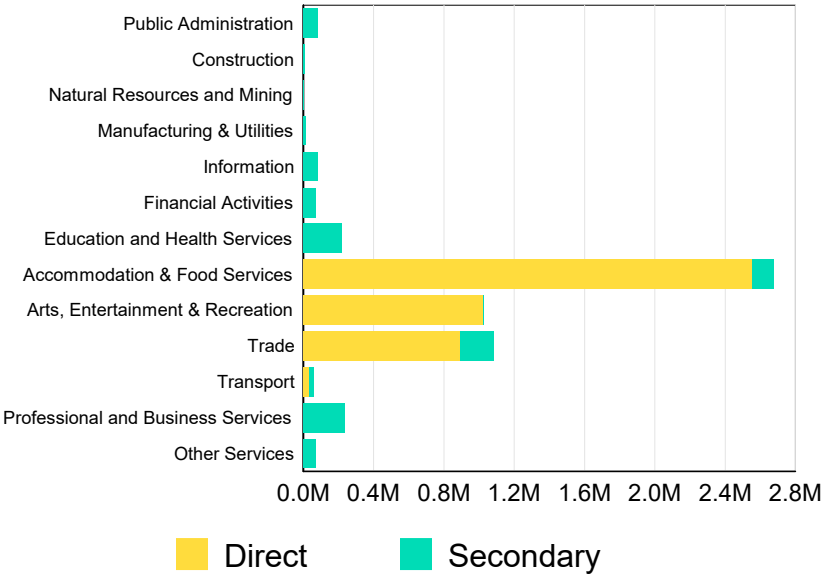
Financial, Trade, and Other Services (13 jobs and \$400 thousand in earnings) Employees and travel businesses utilize a number of service providers such as banking, repair shops, laundry, maintenance, and business services.

Education & Health Services (5 jobs and \$200 thousand in earnings) The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services.

Dawes & Sioux County / Secondary Effects

Total Earnings 2021p

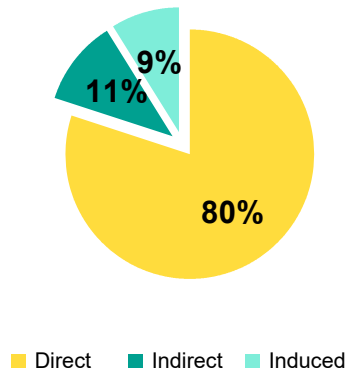
Direct & Secondary Earnings



Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	2.6	0.1	0.0	0.1	2.7
Arts, Entertainment & Recreation	1.0	0.0	0.0	0.0	1.0
Trade	0.9	0.1	0.1	0.2	1.1
Transport	0.0	0.0	0.0	0.0	0.1
Public Administration	0.0	0.1	0.0	0.1	0.1
Construction	0.0	0.0	0.0	0.0	0.0
Natural Resources and Mining	0.0	0.0	0.0	0.0	0.0
Manufacturing & Utilities	0.0	0.0	0.0	0.0	0.0
Information	0.0	0.1	0.0	0.1	0.1
Financial Activities	0.0	0.0	0.0	0.1	0.1
Education and Health Services	0.0	0.0	0.2	0.2	0.2
Professional and Business Services	0.0	0.2	0.0	0.2	0.2
Other Services	0.0	0.0	0.0	0.1	0.1
All Industries	4.5	0.6	0.5	1.1	5.6

Values may not add to totals due to rounding. Figures in \$Millions

Share of Total Earnings



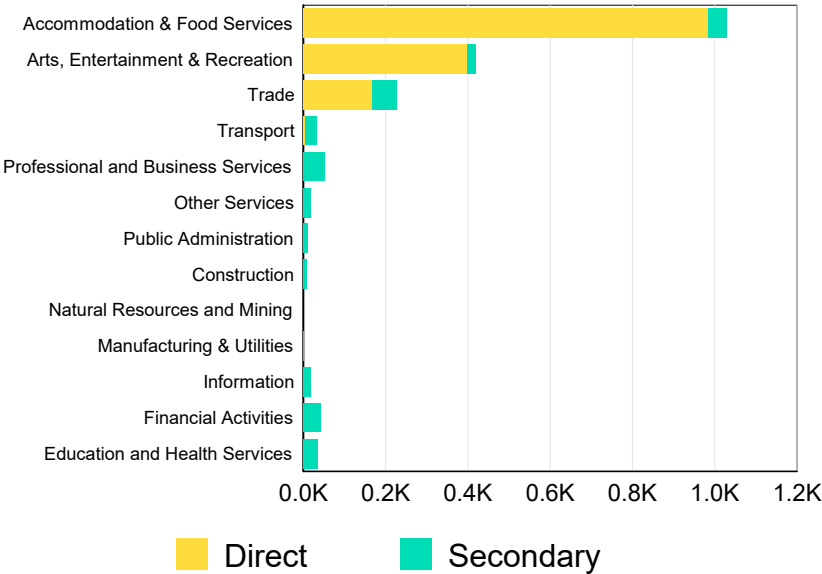
MOST DIRECT Earnings
Accommodation & Food Services

MOST SECONDARY Earnings
Professional & Business Services

Dawes & Sioux County / Secondary Effects

Total Employment 2021p

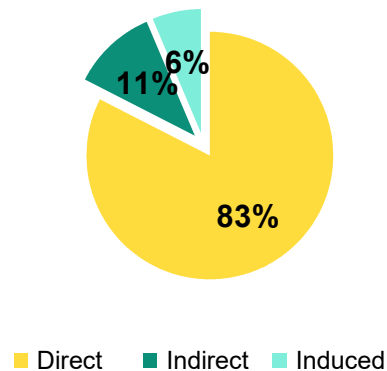
Direct & Secondary Employment



Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	160	4	3	7	165
Arts, Entertainment & Recreation	70	1	1	2	67
Trade	30	3	5	7	40
Transport	0	1	1	1	3
Professional and Business Services	0	13	2	15	15
Other Services	0	2	1	3	3
Public Administration	0	1	0	1	1
Construction	0	0	0	1	1
Natural Resources and Mining	0	0	0	0	0
Manufacturing & Utilities	0	0	0	0	0
Information	0	2	1	3	3
Financial Activities	0	1	1	3	3
Education and Health Services	0	0	5	5	5
All Industries	260	29	19	48	304

Values may not add to totals due to rounding.

Share of Total Employment



MOST DIRECT JOBS
Accommodation & Food Services

MOST SECONDARY JOBS
Professional & Business Services

Glossary

Term	Definition
Hotel, Motel, STVR	Accommodation types that house transient lodging activity.
Private Home	Unpaid overnight accommodations used to host visiting friends and family overnight.
Other Overnight	Combination of other overnight visitors who stay in campgrounds or 2nd homes.
Day Travel	Greater than 50 miles traveled non-routine to the destination.
Visitor Spending	Direct spending made by visitors in a destination.
Other Spending	Spending by residents on travel arrangement services, or spending for convention activity.
Direct Spending	Expenditures made by consumers, combination of Visitor Spending and Other Spending.
Direct Earnings	Total after-tax net income from travel. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.
Direct Employment	Employment generated by direct spending; Includes full time, part time, seasonal, and proprietors.
Local Taxes	City and county taxes generated by travel spending.
State Taxes	State taxes generated by travel spending.
Destination Spending	Interchangeable with Visitor Spending. Direct spending made by visitors in a destination.
STVR	Short Term Vacation Rental, private and semi-private lodging rented by owners or property management companies (e.g. Airbnb, VRBO).
2nd Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected. Only includes spending during trip.



Assumptions / Methodology

Travel Impacts Methodology

Primary travel impact analysis will make use of the Regional Travel Impact Model (RTIM), prepared and maintained by Dean Runyan Associates and used for most of our travel impact analysis since 1985. This model was developed to provide robust impact findings at small geography without reliance on annual survey research. This is a “bottom up” approach whereby analysis is conducted at the county level, then aggregated to regions and the state, allowing us to use the most detailed tax, employment, wages, and other data that are available. Our clients have selected this approach to provide particularly detailed and defensible findings for all parts of their constituency.

Because the model does not rely on annual survey research for its primary inputs, we work in other states with a variety of other visitor profile providers, including national panel managers or those making use of intercept or regional web methodology. Analysis is conducted separately by type of visitor lodging, making use of data and modeling appropriate to each. Impact analysis associated with visitors staying in commercial lodging makes use of lodging tax data to calculate lodging sales, then employs expenditure distribution data for these types of visitors to calculate total sales and the distribution among expenditure categories. We maintain our own expenditure distribution database for each state we work in, but also make use of historic and current expenditure data, as available. Rental cabins, condos and other property are included in this category if lodging tax has been applied to sales.

Earnings, employment, and tax receipts are calculated using employment and wage data by business category, for each county, plus the applicable taxes on each type of expenditure. Tax impacts, such as for restaurant, fuel, and retail purchases, are calculated from spending amounts; totals will be checked against data from state sources.

Sales attributed to campers are calculated from campground inventory (separately for public and commercial campgrounds), camping occupancy data and average expenditures for camping parties. Expenditure data will be from expenditure databases that we maintain, augmented by visitor survey data available for Nebraska, as available.

Other impacts are calculated in a manner like those for commercial accommodation travelers. Sales attributable to travelers staying in their own second homes, or in rented condo, cabin, and other accommodations, are calculated from inventories of these types of lodging and the associated utilization and expenditure data. Findings are made consistent if some of these sales have been subject to lodging tax. Second home inventories are from US Census sources and any local/regional data available. Other impacts are calculated in a manner like those for commercial accommodation travelers.

Day travel spending is calculated as a factor of overnight spending, with the proportions based on visitor data for Nebraska travelers. This analysis will rely the most on visitor profile data provided by the profile contractor. Other impacts are calculated in a similar way as those for commercial accommodation travelers.

All spending estimates are summed for each county and separately for each business category with applicable data then used to calculate earnings, employment, and tax receipts. County totals will be mapped to regions using address and other location data for lodging, camping, and other rental accommodations using separate methods for each type of lodging.

In all cases, our data and methodology are transparent, allowing for reliable error trapping and effective review of findings. All findings are also checked against available comparable data, such as county-level employment data by industry from the US Bureau of Labor Statistics and lodging sales data from STR and Key Data.