

# Impacts of Visitor Spending on the Local Economy: Monocacy National Battlefield, 2006



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# **Impacts of Visitor Spending on the Local Economy: Monocacy National Battlefield, 2006**

## **Executive Summary**

Monocacy National Battlefield (NRA) hosted 18,579 recreation visits in 2006. Based on the 2006 visitor survey 34% of the visitors are local residents, 26% are visitors from outside the local area not staying overnight within 50 miles of the park, and 40% are visitors staying overnight in the local area. Sixty-one percent of overnight visitors are staying in motels and 35% are staying with friends or relatives or other unpaid lodging.

The average visitor party (average party size was 2.4) spent \$159 in the local area. Visitors reported expenditures of their group inside the park and within an hour drive of the park. On a party trip basis, average spending in 2006 was \$29 for local residents, \$40 for non-local day trips, \$474 for visitors in motels, \$330 for campers and \$84 for other overnight visitors. On a per night basis, visitors staying in motels spent \$212 in the local region compared to \$66 for campers and \$25 for other overnight visitors. The average per night lodging cost was \$102 per night for motels and \$36 for campgrounds.

Total visitor spending in 2006 within one hour of the park was \$1.248 million. Overnight visitors staying in motels, cabins or B&B's accounted for 77% of the total spending. Thirty-nine percent of the spending was for lodging, 24% for restaurant meals and bar expenses, 12% for gas and oil, and 11% for souvenirs.

Forty percent of the non-local visitors indicated the park visit was not the primary reason for coming to the area, so only a portion of their expenses can be attributed to the park visit. Omitting spending by local visitors and reducing spending attributed to the park visit for visitors in the area for other reasons yields a total of \$795,000 in spending attributed to the park, about 64% of the total spent by park visitors in the area on the trip.

The economic impact of park visitor spending is estimated by applying this spending to a model of the local economy. The local region was defined to encompass Frederick and Montgomery counties (MD). The tourism spending sales multiplier for the region is 1.55.

Visitor spending in 2006 that can be attributed to the park visit supported 10 jobs in the area outside the park, generating \$438,000 in wages and salaries and \$665,000 in value added. Value added includes wages and salaries as well as profits and rents to area businesses and also sales taxes.

The park itself employed 17 people in FY 2006 with a total payroll including benefits of \$1.034 million. Including secondary effects, the local impact of the park payroll in 2006 was 25 jobs, \$1.3 million in labor income and \$1.5 million total value added.

Including both visitor spending and park operations, the total impact of the park on the local economy in 2006 was 35 jobs and \$2.1 million value added. Park operations account for 72% of the employment effects and 69% of value added.

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## **Introduction**

The purpose of this study is to document the local economic impacts of visitors to Monocacy National Battlefield (NB) in 2006. Economic impacts are measured as the direct and secondary sales, income and jobs in the local area resulting from spending by park visitors. The economic estimates are produced using the Money Generation Model 2 (MGM2) (Stynes and Propst, 2000). Three major inputs to the model are:

- 1) Number of visits broken down by lodging-based segments,
- 2) Spending averages for each segment, and
- 3) Economic multipliers for the local region

Inputs are estimated from the Monocacy NB Visitor Survey, National Park Service Public Use Statistics, and IMPLAN input-output modeling software. The MGM2 model provides a spreadsheet template for combining park use, spending and regional multipliers to compute changes in sales, labor income, jobs and value added in the region.

## **Monocacy NB and the Local Region**

Monocacy NB is located just south of Frederick, Maryland and about an hours drive northwest of Washington D.C. The park hosted 18,579 recreation visitors in 2006 (Table 1).

The local region was defined as a two county area covering Frederick and Montgomery counties in Maryland. This region roughly coincides with the one hour driving distance for which visitor spending was reported in the visitor survey. The region has a population of just over one million people.

## **Monocacy NB Visitor Survey, 2006**

A park visitor study was conducted at Monocacy NB from July 14-30, 2006 (Evans, Eury and Hollenhorst, 2007). The study measured visitor demographics, activities, and travel expenditures. Questionnaires were distributed to a sample of 340 visitors. Most of the sample was obtained at the Gambrill Mill visitor center. Visitors returned 258 questionnaires for a 79% response rate. Data generated through the visitor

survey were used as the basis to develop the spending profiles, segment shares and trip characteristics for Monocacy NB visitors.

About a third of the respondents lived in the local area. Forty percent of the non-local visitors came to the area primarily to visit the Monocacy NB. Twenty-five percent of visitors came to visit other attractions in the area; fifteen percent were visiting friends or relatives in the area.

**Table 1. Recreation Visits to Monocacy NB, 2006-2007**

<b>Month</b>	<b>2006</b>	<b>2007</b>
January	695	679
February	708	401
March	1,543	997
April	1,943	1,564
May	1,701	1,799
June	1,786	2,458
July	3,091	4,516
August	1,922	2,454
September	1,361	2,506
October	1,824	2,173
November	1,056	1,499
<u>December</u>	<u>949</u>	<u>1,079</u>
<b>Total</b>	<b>18,579</b>	<b>22,125</b>

Source: NPS Public Use Statistics

## **MGM2 Visitor Segments**

MGM2 divides visitors into segments to help explain differences in spending across distinct user groups. Five segments were established for Monocacy NB visitors:

**Local day users:** Day visitors who reside within the local region, defined as one hour drive of the park.

**Non-local day users:** Visitors from outside the region, not staying overnight in the area. This includes day trips as well as pass-through travelers, who may be staying overnight on their trip outside the region.

**Motel:** Visitors staying in motels, hotels, cabins, or B&B's within a one hour drive of the park

**Camp:** Visitors staying in private or public campgrounds within a one hour drive of the park

**Other OVN:** Other visitors staying overnight in the area with friends or relatives or not reporting any lodging expenses

The 2006 visitor survey was used to estimate the percentage of visitors from each segment as well as spending averages, lengths of stay and party sizes for each segment. Thirty-four percent of the visitors are local residents, 26% are visitors from outside the local area not staying overnight within a sixty minute drive of the park, and 40% are

visitors staying overnight within a sixty minute drive of the park. Sixty-one percent of the overnight visitors (61%) are staying in motels, cabins or B&B's, 4% are camping and 35% are staying with friends or relatives or other unpaid lodging (Table 2)<sup>1</sup>. The average spending party size was 2.4 people.

Local residents were assumed to be making the trip primarily to visit the park. Non-local visitors on day trips and campers were more likely to make the trip primarily to visit the park than visitors staying in motels or with friends and relatives.

**Table 2. Selected Visit/Trip Characteristics by Segment, 2006**

Characteristic	Local	Day trip	Motel	Camp	Other OVN	Total
Segment share	34%	26%	24%	2%	14%	100%
Average Party size	2.30	2.61	2.20	2.50	2.41	<b>2.36</b>
Length of stay (days/nights)	1.08	1.02	2.24	5.00	3.40	1.60
Percent primary purpose trips	100%	45%	44%	0%	24%	40% <sup>a</sup>

a. Excludes local visitors

Monocacy NB hosted 18,579 recreation visitors in 2006. Recreation visits were allocated to the five segments using the segment shares in Table 2. These visits are converted to 7,858 party trips by dividing by the average party size for each segment (Table 3).

**Table 3. Recreation Visits and Party Trips by Segment, 2006**

Measure	Local	Day trip	Motel	Camp	Other OVN	Total
Recreation visits	6,337	4,897	4,465	288	2,592	18,579
Party visits/trips	2,757	1,879	2,032	115	1,075	7,858
Person trips	6,337	4,897	4,465	288	2,592	18,579
Percent of party trips	35%	24%	26%	1%	14%	100%
Party nights	2,978	1,908	4,547	576	3,655	13,665

## Visitor spending

Spending averages were computed on a party trip basis for each segment. The survey covered expenditures of the travel party within a one hour drive of the park. The average visitor party spent \$159 in the local area<sup>2</sup>. On a party trip basis, average spending in 2006 was \$29 for local residents, \$40 for non-local day trips, \$474 for visitors in motels, \$330 for campers<sup>3</sup> and \$84 for other overnight visitors (Table 4).

<sup>1</sup> These percentages vary slightly from the VSP report (Evans, Eury and Hollenhorst. 2007) as some visitors listing motels or campgrounds as lodging types did not report any lodging expenses and are classified here in the other OVN category.

<sup>2</sup> The average of \$159 is lower than the \$177 spending average in the VSP report (Evans, Eury and Hollenhorst 2007) due to the omission of outliers and treatment of missing spending data.

<sup>3</sup> There were only four campers in the sample with an average stay of 5 nights. The per night camper spending average was \$66.

**Table 4. Average Visitor Spending by Segment (\$ per party per trip), 2006**

	Local	Day trip	Motel	Camp	Other OVN	Total
<b>In Park</b>						
Souvenirs	3.63	5.08	7.85	17.50	3.26	5.22
<b>In Community</b>						
Motel, hotel cabin or B&B	0.00	0.00	228.05	0.00	0.00	58.98
Camping fees	0.00	0.00	0.10	180.50	0.00	2.67
Restaurants & bars	9.54	13.35	104.90	17.50	25.29	37.39
Groceries, take-out food/drinks	3.18	2.16	15.07	25.75	9.85	7.25
Gas & oil	5.66	12.88	40.36	70.00	22.21	19.57
Local transportation	1.72	0.52	14.85	0.00	0.00	4.57
Admissions & fees	0.18	3.00	17.74	11.00	5.06	6.22
<u>Souvenirs and other expenses</u>	<u>5.40</u>	<u>3.01</u>	<u>45.23</u>	<u>8.00</u>	<u>18.76</u>	<u>17.00</u>
<b>Grand Total</b>	<b>29.32</b>	<b>40.00</b>	<b>474.14</b>	<b>330.25</b>	<b>84.44</b>	<b>158.87</b>
Total in park	3.63	5.08	7.85	17.50	3.26	5.22
Total Outside park	25.69	34.93	466.29	312.75	81.18	153.66

On a per night basis, visitors staying in motels spent \$212 in the local region compared to \$66 for campers and \$25 for other overnight visitors. The average per night lodging cost was \$102 per night for motels and \$36 for campgrounds.

The sampling error (95% confidence level) for the overall spending average is 22%. A 95% confidence interval for the spending average is therefore \$159 plus or minus \$35 or (\$124, \$194).

**Table 5. Average Spending per Night for Visitors on Overnight Trips (\$ per party per night)**

Spending category	Motel	Camp	Other OVN
Motel, hotel cabin or B&B	101.93	0.00	0.00
Camping fees	0.04	36.10	0.00
Restaurants & bars	46.89	3.50	7.44
Groceries, take-out food/drinks	6.73	5.15	2.90
Gas & oil	18.04	14.00	6.53
Local transportation	6.64	0.00	0.00
Admissions & fees	7.93	2.20	1.49
<u>Souvenirs and other expenses</u>	<u>23.72</u>	<u>5.10</u>	<u>6.48</u>
<b>Total</b>	<b>211.93</b>	<b>66.05</b>	<b>24.84</b>

Note: Excludes park admissions

Monocacy NB visitors spent a total of \$1.248 million in the local area in 2006 (Table 6). Total spending was estimated by multiplying the number of party trips for each segment by the average spending per trip and summing across segments.

Overnight visitors staying in motels, cabins or B&B's accounted for 77% of the total spending. Thirty-nine percent of the spending was for lodging, 24% for restaurant meals and bar expenses, 12% for gas and oil, and 11% for souvenirs.

**Table 6. Total Visitor Spending by Segment, 2006 (\$000s)**

	Local	Day trip	Motel	Camp	Other OVN	Total
<b>In Park</b>						
Souvenirs	10.0	9.5	15.9	2.0	3.5	41.0
<b>In Community</b>						
Motel, hotel cabin or B&B	0.0	0.0	463.5	0.0	0.0	463.5
Camping fees	0.0	0.0	0.2	20.8	0.0	21.0
Restaurants & bars	26.3	25.1	213.2	2.0	27.2	293.8
Groceries, take-out food/drinks	8.8	4.1	30.6	3.0	10.6	57.0
Gas & oil	15.6	24.2	82.0	8.1	23.9	153.8
Local transportation	4.8	1.0	30.2	0.0	0.0	35.9
Admissions & fees	0.5	5.6	36.1	1.3	5.4	48.9
<u>Souvenirs and other expenses</u>	<u>14.9</u>	<u>5.7</u>	<u>91.9</u>	<u>0.9</u>	<u>20.2</u>	<u>133.6</u>
<b>Grand Total</b>	<b>80.8</b>	<b>75.2</b>	<b>963.7</b>	<b>38.1</b>	<b>90.8</b>	<b>1,248.5</b>
Segment Percent of Total	6%	6%	77%	3%	7%	100%

Not all of this spending would be lost to the region in the absence of the park as 34% of the visitors are local residents and only 40% of non-local visitors came to the area primarily to visit the park. Spending directly attributed to the park visit was estimated by counting all spending for trips where the park was the primary reason for the trip. Half of the spending outside the park was counted for day trips if the trip was not made primarily to visit Monocacy NB. The equivalent of one night of spending was attributed to the park visit for overnight trips made to visit other attractions, friends or relatives or on business.<sup>4</sup> All spending inside the park was counted, but all spending by local visitors outside the park was excluded.

These attributions yield a total of \$795,000 in visitor spending attributed to the park visit, representing 64% of the overall visitor spending total (Table 7).

### **Economic Impacts of Visitor Spending**

The economic impacts of Monocacy NB visitor spending on the local economy are estimated by applying the spending attributed to the park (Table 7) to a set of economic ratios and multipliers representing the local economy. Multipliers for the region were estimated with the IMPLAN system using 2001 data. The tourism sales multiplier for the region is 1.55. Every dollar of direct sales to visitors generates another \$ .55 in secondary sales through indirect and induced effects<sup>5</sup>.

<sup>4</sup> This assumes that these visitors spent an extra night in the area to visit Monocacy NB.

<sup>5</sup> Indirect effects result from tourism businesses buying goods and services from local firms, while induced effects stem from household spending of income earned from visitor spending.

**Table 7. Total Spending Attributed to Park Visits, 2006 (\$000s)**

	Local	Day trip	Motel	Camp	Other OVN	Total
<b>In Park</b>						
Souvenirs	10.0	9.5	15.9	2.0	3.5	41.0
<b>In Community</b>						
Motel, hotel cabin or B&B		0.0	319.6	0.0	0.0	319.6
Camping fees		0.0	0.1	4.2	0.0	4.3
Restaurants & bars		18.2	147.0	0.4	12.5	178.2
Groceries, take-out food/drinks		2.9	21.1	0.6	4.9	29.5
Gas & oil		17.6	56.6	1.6	11.0	86.8
Local transportation		0.7	20.8	0.0	0.0	21.5
Admissions & fees		4.1	24.9	0.3	2.5	31.7
<u>Souvenirs and other expenses</u>		<u>4.1</u>	<u>67.4</u>	<u>0.6</u>	<u>10.1</u>	<u>82.2</u>
<b>Total Attributed to Park</b>	<b>10.0</b>	<b>57.2</b>	<b>673.4</b>	<b>9.6</b>	<b>44.5</b>	<b>794.8</b>
Percent of spending attributed to the park	12%	76%	70%	25%	49%	64%
Percent of attributed spending	1%	7%	85%	1%	6%	100%

Impacts are estimated based on the visitor spending attributed to the park in Table 7. Including direct and secondary effects, the \$795,000 spent by park visitors<sup>6</sup> supports 10 jobs in the area and generates \$1.0 million in sales, \$438,000 in labor income and \$665,000 in value added (Table 8).

**Table 8. Economic Impacts of Visitor Spending Attributed to the Park, 2006.**

Sector/Spending category	Sales \$000's	Jobs	Labor Income \$000's	Value Added \$000's
<b>Direct Effects</b>				
Motel, hotel cabin or B&B	320	1	139	226
Camping fees	4	0	1	2
Restaurants & bars	178	3	92	104
Admissions & fees	32	1	12	19
Local transportation	22	0	11	12
Grocery stores	7	0	3	5
Gas stations	19	0	9	11
Other retail	62	1	30	42
Wholesale Trade	18	1	9	10
<u>Local Production of goods</u>	<u>1</u>	<u>0</u>	<u>0</u>	<u>0</u>
<b>Total Direct Effects</b>	<b>663<sup>a</sup></b>	<b>7</b>	<b>305</b>	<b>432</b>
<u>Secondary Effects</u>	<u>365</u>	<u>3</u>	<u>132</u>	<u>233</u>
<b>Total Effects</b>	<b>1,028</b>	<b>10</b>	<b>438</b>	<b>665</b>

a. Total direct sales are less than visitor spending as direct sales excludes the cost of goods sold at retail unless the good is locally made.

<sup>6</sup> Revenues received by the park (park admissions and donations) are excluded in estimating visitor spending impacts as the impacts resulting from park revenues are covered as part of park operations.

Labor income covers wages and salaries, including payroll benefits. Value added is the preferred measure of the contribution to the local economy as it includes all sources of income to the area -- payroll benefits to workers, profits and rents to businesses, and sales and other indirect business taxes.

### **Impacts of the NPS Park Payroll**

The park itself employed 17 people in FY 2006 with a total payroll including benefits of \$1.034 million. Including secondary effects, the local impact of the park payroll in 2006 was 25 jobs, \$1.3 million in labor income and \$1.5 million total value added. Including both visitor spending and park operations, the total impact of the park on the local economy in 2006 was 35 jobs and \$2.1 million value added. Park operations account for 72% of the employment effects and 69% of value added.

### **Study Limitations and Error**

The accuracy of the MGM2 estimates rests on the accuracy of the three inputs: visits, spending averages, and multipliers. Recreation visit estimates rely on counting procedures at the park, which may miss some visitors and count others more than once during their visit. Recreation visits were adjusted for double counting based on the number of days respondents reported visiting the park during their stay in the area.

Spending averages are derived from the 2006 Monocacy NB Visitor Survey. Estimates from the survey are subject to sampling errors, measurement errors and seasonal/sampling biases. The overall spending average is subject to sampling errors of 22%.

Spending averages are also sensitive to decisions about outliers and treatment of missing data. To carry out the analysis incomplete spending data had to be completed and decisions had to be made about the handling of missing spending data and zero spending reports. Conservative assumptions were adopted.

Cases reporting some expenses but leaving other categories blank were completed with zeros. Respondents that did not complete the spending question were assumed to spend no money on the trip. Fourteen percent of the cases had missing spending data and 8% reported zero spending. These cases were mostly visits by local residents or day trips. Dropping the missing spending cases instead of treating them as zeros would increase the overall spending average from \$159 to \$172.

One case reporting a party size of 36 and three cases reporting more than 7 nights in the area were omitted in computing spending averages, average party sizes and lengths

of stay<sup>7</sup>. The overall spending average was \$159 omitting these outliers compared to \$160 with outliers (See Appendix B for details).

Although sample sizes are small for most segments, the spending averages are consistent with those at similar recreation areas. Estimated nightly room and campsite rates are also reasonable for the area. As the sample only covers visitors during a single week, we must assume these visitors are representative of visitors during the rest of the year to extrapolate to annual totals.

Since overnight visitors staying in motels, cabins or B&B's have the greatest spending, the overall spending estimate is sensitive to the number of such visitors. Twenty-four percent of the visitors sampled in the VSP study reported motel expenses and were classified in the "motel" segment. For the 44% of these overnight visitors indicating the visit to Monocacy NB was the primary reason for the trip, all expenses in the area are counted. Only one night of spending (\$212) is attributed to the park visit for the 56% visitors in motels who came to the area for other reasons.

Multipliers are derived from an input-output model of the local economy using IMPLAN. The local model was estimated with 2001 IMPLAN county data. Employment estimates were adjusted to 2006 based on changes in sales to employment ratios for each economic sector between 2001 and 2006. Input-output models rest on a number of assumptions, however, errors due to the multipliers will be small compared to potential errors in visit counts and spending estimates.

Sorting out the contribution of the park in attracting visitors on multi-purpose or multi-destination trips is inherently difficult. As the park was not the primary reason for the trip to the region for all visitors, some of the spending would likely not be lost in the absence of the park. The procedures for attributing spending to the park are somewhat subjective, but reasonable. They result in 64% of all visitor spending being attributed to park visits.

## **REFERENCES**

Evans, J. Eury, D. and Hollenhorst, S.J. (2007). Monocacy National Battlefield Visitor Study. Summer 2006. Visitor Services Project Report #179. Moscow, ID: National Park Service and University of Idaho, Cooperative Park Studies Unit.

National Park Service Public Use Statistic Office. (2006). Visitation DataBase. <http://www2.nature.nps.gov/stats/>. Data retrieved on March 30, 2008.

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<sup>7</sup> Reports of spending for long stays and large parties are deemed unreliable. Spending reported for large parties may not include everyone in the party. Recall of spending for very long stays may also be unreliable and such stays frequently involve multiple stops and activities, so that much of the spending is unrelated to the park visit. Since spending averages are applied to all visits, the procedures are equivalent to substituting the average of visitors in the corresponding visitor segment for these outliers.

Stynes, D. J., Propst, D.B., Chang, W. and Sun, Y. (2000). Estimating national park visitor spending and economic impacts: The MGM2 model. May, 2000. Final report to National Park Service. East Lansing, Michigan: Department of Park, Recreation and Tourism Resources, Michigan State University.

## Appendix A: Definitions of Economic Terms

Term	Definition
Sales	Sales of firms within the region to park visitors.
Jobs	The number of jobs in the region supported by the visitor spending. Job estimates are not full time equivalents, but include part time positions.
Labor income	Wage and salary income, sole proprietor's income and employee payroll benefits.
Value added	Labor income plus rents and profits and indirect business taxes. As the name implies, it is the net value added to the region's economy. For example, the value added by a hotel includes wages and salaries paid to employees, their payroll benefits, profits of the hotel, and sales and other indirect business taxes. The hotel's non-labor operating costs such as purchases of supplies and services from other firms are not included as value added by the hotel.
Direct effects	Direct effects are the changes in sales, income and jobs in those business or agencies that directly receive the visitor spending.
Secondary effects	These are the changes in the economic activity in the region that result from the re-circulation of the money spent by visitors. Secondary effects include indirect and induced effects.
Indirect effects	Changes in sales, income and jobs in industries that supply goods and services to the businesses that sell directly to the visitors. For example, linen suppliers benefit from visitor spending at lodging establishments.
Induced effects	Changes in economic activity in the region resulting from household spending of income earned through a direct or indirect effect of the visitor spending. For example, motel and linen supply employees live in the region and spend their incomes on housing, groceries, education, clothing and other goods and services.
Total effects	Sum of direct, indirect and induced effects. <ul style="list-style-type: none"> <li>▪ Direct effects accrue largely to tourism-related businesses in the area</li> <li>▪ Indirect effects accrue to a broader set of businesses that serve these tourism firms.</li> <li>▪ Induced effects are distributed widely across a variety of local businesses.</li> </ul>

## Appendix B: Handling of Missing Spending Data and Outliers

To compute spending averages and to sum spending across categories, spending categories with missing spending data had to be filled. If spending was reported in any category, the remaining categories were assumed to be zero. This yielded 202 cases with valid spending data, 20 cases reporting zero spending and 36 cases not completing the spending question. Cases with no spending data were local residents, on day trips or on overnight trips reporting no lodging expenses. It was assumed that these cases spent no money in the local area.

**Table B-1. Cases with Valid, Zero and Missing Spending Data by Segment**

	Local	Day trip	Motel	Camp	Other OVN	Total
Report some spending	64	56	62	4	16	202
Missing spending data	4	4	0	0	12	20
<u>Zero spending</u>	<u>20</u>	<u>8</u>	<u>0</u>	<u>0</u>	<u>8</u>	<u>36</u>
Total cases	88	68	62	4	36	258
Percent zero	23%	12%	0%	0%	22%	14%
Percent missing	5%	6%	0%	0%	33%	8%

Four cases were omitted from the spending analysis. Three of these reported stays of more than seven nights. One case reported a party size of 36. The overall spending is not influenced by these omissions.

**Table B-2. Spending Averages by Segment, with and without outliers**

Segment	With outliers			Without outliers			Pct Error <sup>a</sup>
	Mean	N	Std. Deviation	Mean	N	Std. Deviation	
Local	30	88	57	29	87	56	40%
Day trip	56	68	137	40	67	47	28%
Motel	487	62	386	474	61	377	20%
Camp	330	4	317	330	4	322	95%
<u>Other OVN</u>	<u>93</u>	<u>36</u>	<u>153</u>	<u>84</u>	<u>34</u>	<u>151</u>	<u>60%</u>
Total	160	258	285	159	253	274	21%

a. Pct errors computed at a 95% confidence level

## Appendix C. Impacts of all Visitor Spending, 2006

Table C1 gives the impacts of \$1.248 million in visitor spending on the local economy. All visitor spending in the region except donations is included in this analysis. Impacts including all visitor spending are roughly 55% higher than those reported in Table 8, which count only spending directly attributable to the park visits.

**Table C-1. Impacts of all Visitor Spending on the Local Economy, 2006**

Sector/Spending category	Sales \$000's	Jobs	Labor Income \$000's	Value Added \$000's
<b>Direct Effects</b>				
Motel, hotel cabin or B&B	463	2	202	328
Camping fees	21	0	4	9
Restaurants & bars	294	4	152	171
Admissions & fees	49	1	18	30
Local transportation	36	1	18	20
Grocery stores	14	0	7	9
Gas stations	34	0	15	20
Other retail	87	1	43	60
Wholesale Trade	29	1	14	16
<u>Local Production of goods</u>	<u>2</u>	<u>0</u>	<u>0</u>	<u>0</u>
<b>Total Direct Effects</b>	1,030 <sup>a</sup>	11	472	664
<u>Secondary Effects</u>	<u>570</u>	<u>4</u>	<u>207</u>	<u>364</u>
<b>Total Effects</b>	1,600	15	679	1,028

a. Total direct sales are less than visitor spending as direct sales excludes the cost of goods sold at retail unless the good is locally made.