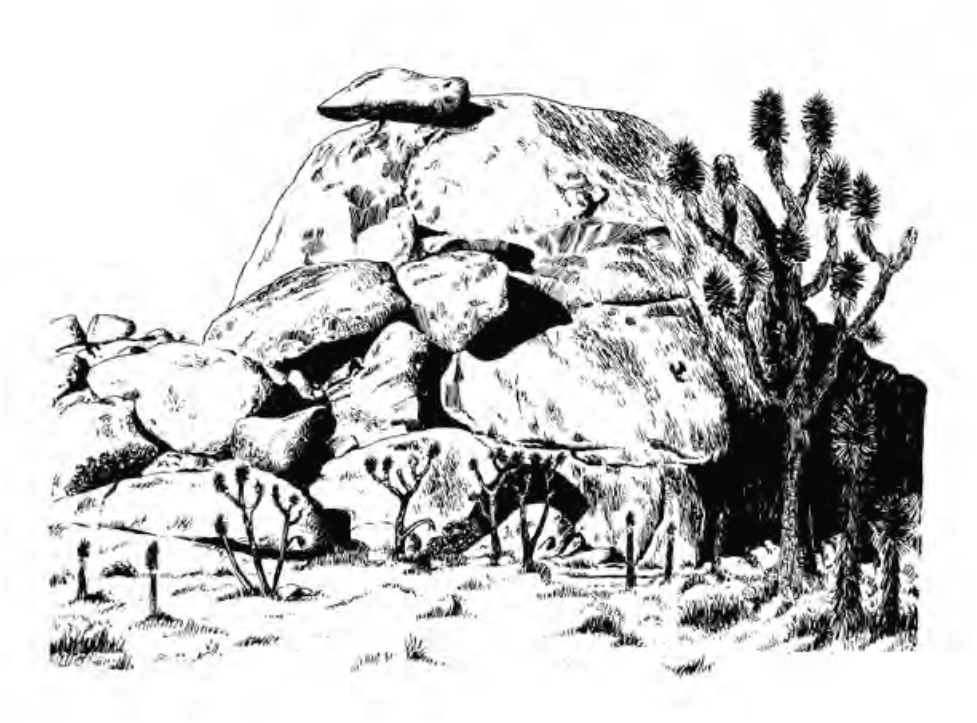
Impacts of Visitor Spending on the Local Economy: Joshua Tree National Park, 2004



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Executive Summary

Joshua Tree National Park hosted 1,243,659 recreation visits in 2004. Based on the 2004 visitor survey 10% of the visitors are local residents, 32% are visitors from outside the local area not staying overnight within the local region, and 58% are visitors staying overnight in the local area. About a quarter of visitors were campers and 21% stayed in area motels, hotels, cabins, or BB's.

The average visitor group spent $162 in the local area. Visitors reported expenditures of their group inside the park and in the surrounding communities (Yucca Valley, Joshua Tree, and Twenty-nine Palms. On a party trip basis, average spending in 2004 was $54 for non-local day trips, $351 for visitors in motels, $200 for campers and $136 for other overnight visitors. On a per night basis, visitors staying in motels spent $216 in the local region compared to $86 for campers. The average per night lodging cost was $104 per night for visitors in motels and $11 for campers.

Total visitor spending in 2004 within 50 miles of the park was $36 million including $4.8 million inside the park. Twenty-three percent of the total spending was for lodging, 18% restaurant meals and bar expenses, and 15% gas and oil.. Overnight visitors staying in motels accounted for 43% of the spending, campers 22% and non-local day trips 21%.

Not all of this spending would be lost to the region in the absence of the park. Fifteen percent of park visitors did not come to the area primarily to visit Joshua Tree NP, so only a portion of their expenses can be attributed to the park visit.

Spending directly attributed to the park was estimated by counting all spending for visitors whose primary reason for coming to the area was to visit the park, and a portion of spending outside the park if the park was not the primary reason for the trip to the area. These procedures yield a total of $31 million in spending attributed to the park, about 85% of the $36 million spent by park visitors in the area.

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 include Riverside and Bernardino counties in California.

Including direct and secondary effects, the $30.7 million spent by park visitors[1] supports 603 jobs in the area and generates $35.4 million in sales, $14 million in personal

[1] 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.

income and $21 million in value added. Value added includes wages and salaries as well as profits and rents to area businesses and sales taxes.

Recreation visits increased by 10% in 2005 to 1,375,111 visitors. Combined with a 5% increase in per visitor spending, total visitor spending increased to $42.5 million in 2005. The park itself employed 111 people in FY 2005 with a total payroll of $5.5 million. Including secondary effects, the local impact of the park payroll in 2005 was 163 jobs, $7 million in personal income and $8 million total value added. Including both visitor spending and park operations, the total impact of the park on the local economy in 2005 was 833 jobs and $32 million value added. Park operations account for 20% of the employment effects and a fourth of the value added.

Impacts of Visitor Spending on the Local Economy: Joshua Tree National Park , 2004

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Introduction

The purpose of this study is to document the local economic impacts of visitors to Joshua Tree National Park (JOTR) in 2004. 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 Joshua Tree NP 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, personal income, jobs and value added in the region.

Joshua Tree National Park and the Local Region

Joshua Tree NP is located in southeastern California east of Palm Springs. The park preserves ecosystems of the Colorado and Mojave deserts. The park hosted 1.244 million recreation visits in 2004 and 1.375 million in 2005. Park use is heaviest in March and April (Table 1).

The local region was defined to include Riverside and Bernardino counties.

Table 1. Recreation Visits to Joshua Tree NP, 2004-2005

	Recreation Visits		Overnight stays	
Month	2004	2005	2004	2005
January	113,881	89,602	25,958	19,048
February	112,696	107,227	19,998	20,680
March	175,444	267,723	37,024	51,884
April	183,679	207,664	43,083	53,197
May	103,122	126,323	21,724	23,607
June	64,776	76,272	6,320	6,380
July	59,155	50,610	3,465	2,839
August	59,699	66,270	3,924	4,210
September	67,954	70,188	7,942	9,434
October	104,369	101,034	31,455	24,176
November	112,344	113,626	27,153	31,967
December	86,540	98,572	17,122	21,009
Total	1,243,659	1,375,111	245,168	268,431

Source: NPS Public Use Statistics

Joshua Tree NP Visitor Survey, 2004

A park visitor study was conducted at Joshua Tree NP from April 3-9, 2004 (Littlejohn and Hollenhorst, 2005). The study measured visitor demographics, activities, and travel expenditures. Questionnaires were distributed to a sample of 700 visitors at the park entrance. Visitors returned 525 questionnaires for a 75% response rate. Data generated through the visitor survey were used as the basis to develop the spending profiles, segment shares and trip characteristics for Joshua Tree NP visitors.

Eighty-five percent of visitors came to the area primarily to visit Joshua Tree NP.

MGM2 Visitor Segments

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

Local day users: Day visitors who reside within the local region, defined as a 50 mile radius 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 50 miles of the park

Camp: Visitors staying in private or public campgrounds within 50 miles of the park. Most campers were staying in the park.

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

The 2004 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. Segment shares from the survey were adjusted to be consistent with park overnight stay figures.

Ten percent of the visitors surveyed were local residents, 32% of the trips were classified as non-local day trips, and 58% were overnight trips including an overnight stay in the local area. About a quarter of visitors were campers and 21% stayed in area motels, hotels, cabins, or BB's (Table 2)[2]. The average spending party was 2.5 people.

Eighty-five percent of visitors indicated that visiting the park was the primary reason for the trip to the area. Other were visiting friends and relatives in the area, on business or visiting other area attractions. About sixty percent of visitors claimed that JOTR was the primary destination while a third claimed it was one of several destinations.

Table 2. Selected Visit/Trip Characteristics by Segment, 2004

Characteristic	Local	Day trip	Motel	Camp	Other OVN	Total
Segment share	10%	32%	21%	26%	11%	100%
Average Party size	1.5	2.4	2.5	3.1	2.1	2.5
Length of stay (days/nights)	1.0	1.0	1.6	2.3	3.4	1.8
Park entries per trip	1.4	1.2	2.3	2.7	2.9	2.1
Percent primary purpose trips	80%	74%	76%	94%	84%	82%

Joshua Tree NP hosted 1,243,659 recreation visitors in 2004. Recreation visits were allocated to the five segments using the segment shares in Table 2. Half of the visitors visited the park more than once during their stay in the area. These visitors are counted each time they enter the park. Since spending is reported for the stay in the area, park visits (entries) were converted to trips to the area by dividing by the average number of times each visitor segment entered the park.

Recreation visits are converted to 302,421 party trips by dividing by the average party size and park entry rate for each segment (Table 3). Total visitor spending is estimated by multiplying the number of party trips of each segment by the average spending estimated in the survey.

Table 3. Recreation Visits and Party Trips by Segment, 2004

Measure	Local	Day trip	Motel	Camp	Other OVN	Total
Recreation visits	124,366	397,971	261,168	323,351	136,802	1,243,659
Party visits/trips	57,677	138,633	44,389	38,939	22,784	302,421

[2] These percentages vary slightly from the VSP report (Le, Littlejohn and Hollenhorst. 2005) 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.

Visitor spending

Spending averages were computed on a party trip basis for each segment. The survey covered expenditures of the travel party in the park and the surrounding area including Yucca Valley, Joshua Tree, and Twenty-nine Palms.

The average visitor group in 2004 spent $162 on the trip[3]. On a party trip basis, average spending was $40 for local day trips, $54 for non-local day trips, $351 for visitors in motels, $200 for campers and $136 for other overnight visitors (Table 4). On a per night basis, visitors in motels spent $216 in the local region compared to $86 for campers and $40 for other overnight visitors. The average per night lodging cost was $104 per night for visitors in motels and $11 for campers.

Table 4. Average Visitor Spending by Segment ($ per party per trip)

	Local[a]	Day trip	Motel	Camp	Other OVN	All Visitors
In Park						
Admissions	3.13	4.83	6.82	8.13	5.94	6.06
Camping fees	0.00	0.00	0.00	20.91	0.00	5.44
Gift shop	4.83	7.52	12.03	9.34	2.45	8.11
Donations	0.50	0.45	0.13	0.49	0.00	0.35
In Community						
Motel, hotel cabin or B&B	0.00	0.00	168.13	17.65	0.00	39.89
Camping fees	0.00	0.00	0.00	4.69	0.00	1.22
Restaurants & bars	7.38	8.38	72.81	24.65	32.88	28.73
Groceries, take-out food/drinks	6.88	5.66	24.06	47.48	29.20	23.11
Gas & oil	8.55	13.67	27.97	35.73	22.14	22.83
Local transportation	0.75	7.71	24.13	12.73	19.39	13.05
Admissions & fees	1.40	0.65	4.55	3.73	1.73	2.47
Souvenirs and other expenses	5.45	4.73	10.15	14.37	21.90	10.34
Donations	0.13	0.05	0.50	0.05	0.82	0.24
Grand Total	**38.98**	**53.66**	**351.28**	**199.94**	**136.45**	**161.83**
Total in park	8.45	12.80	18.97	38.86	8.39	19.95
Total Outside park	30.53	40.85	332.31	161.08	128.06	141.88

The sampling error at a 95% confidence level for the overall spending average is 11%. The sampling error for the motel and camping segments are only slightly higher. A 95% confidence interval for the overall spending average is ($145, $179) (See Table B-2 in the appendix).

[3] The average of $162 is lower than the $254 spending average in the VSP report (Le, Littlejohn and Hollenhorst 2005) due to the omission of some outliers and treatment of missing spending data. The median spending in the VSP report was $115.

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	104.08	7.72	0.00
Camping fees	0.00	11.20	0.00
Restaurants & bars	45.07	10.79	9.53
Groceries, take-out food/drinks	14.90	20.78	8.47
Gas & oil	17.32	15.64	6.42
Local transportation	14.94	5.57	5.62
Admissions & fees	4.75	3.75	2.48
Souvenirs and other expenses	13.73	10.38	7.06
Donations	0.81	0.25	0.85
Grand Total	**215.59**	**86.08**	**40.43**

Joshua Tree NP visitors spent a total of $36 million in the local area in 2004 (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 accounted for 43% of the total spending, campers 22% and non-local day trips 21%. Lodging accounted for 23% of the total spending, restaurants and bars 18% and gas and oil 15%. A number reporting local transportation expenses of 100-800, rest report zero – car rentals or air trans?.

Table 6. Total Visitor Spending by Segment, 2004 ($000s)

	Local	Day trip	Motel	Camp	Other OVN	All Visitors
In Park						
Admissions	180	670	303	316	135	1,605
Camping fees	0	0	0	814	0	814
Gift shop	278	1,042	534	364	56	2,274
Donations	29	63	6	19	0	117
In Community						
Motel, hotel cabin or B&B	0	0	7,463	687	0	8,150
Camping fees	0	0	0	183	0	183
Restaurants & bars	425	1,161	3,232	960	749	6,527
Groceries, take-out food/drinks	397	784	1,068	1,849	665	4,763
Gas & oil	493	1,895	1,242	1,391	504	5,526
Local transportation	43	1,069	1,071	496	442	3,121
Admissions & fees	81	90	202	145	40	558
Souvenirs and other expenses	314	656	451	560	499	2,480
Donations	7	7	22	2	19	57
Grand Total	**2,248**	**7,439**	**15,593**	**7,785**	**3,109**	**36,174**
Total In park	487	1,775	842	1,513	191	4,809
Total Outside park	1,761	5,664	14,751	6,272	2,918	31,365
Segment Percent of Total	6%	21%	43%	22%	9%	100%

Not all of this spending would be lost to the region in the absence of the park as some visitors did not make the trip 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. If the park was not the primary destination, one night of spending was counted for non-primary purpose overnight trips and spending for a local day trip was counted for non-primary day trips. All spending inside the park was counted, but all spending by local visitors outside the park was excluded.

These attributions yield a total of $30.7 million in visitor spending attributed to the park visit, representing 85% of the overall visitor spending total (Table 7).

Table 7. Total Spending Attributed to Park Visits, 2004 ($000s)

	Local	Day trip	Motel	Camp	Other OVN	All Visitors
In Park						
Admissions	180	670	303	316	135	1,605
Camping fees	0	0	0	814	0	814
Gift shop		500	220	105	19	844
Donations	29	63	6	19	0	117
In Community						
Motel, hotel cabin or B&B		0	6,771	663	0	7,433
Camping fees		0	0	176	0	176
Restaurants & bars		1,125	2,932	926	662	5,645
Groceries, take-out food/drinks		828	969	1,783	588	4,168
Gas & oil		1,712	1,127	1,342	446	4,626
Local transportation		820	972	478	391	2,660
Admissions & fees		117	183	140	35	476
Souvenirs and other expenses		682	409	540	441	2,072
Donations		10	20	2	16	48
Total Attributed to Park	**209**	**6,526**	**13,910**	**7,304**	**2,733**	**30,682**
Percent of all spending attributed to the park	9%	88%	89%	94%	88%	85%

Economic Impacts of Visitor Spending

The economic impacts of Joshua Tree NP 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 1.62. Every dollar of direct sales to visitors generates another $ .62 in secondary sales through indirect and induced effects[4].

Impacts are estimated based on the visitor spending attributed to the park in Table 7[5]. Including direct and secondary effects, the $30.7 million spent by park visitors[6] supports 603 jobs in the area and generates $35.4 million in sales, $14 million in personal income and $21 million in value added (Table 8). Personal 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. The largest direct effects are in lodging establishments and restaurants.

Table 8. Economic Impacts of Visitor Spending Attributed to the Park, 2004.

Sector/Spending category	Sales $000's	Jobs	Personal Income $000's	Value Added $000's
Direct Effects				
Motel, hotel cabin or B&B	7,433	120	3,242	5,264
Camping fees	176	1	25	59
Restaurants & bars	5,645	139	2,444	2,759
Admissions & fees	476	8	176	296
Local transportation	2,660	102	1,270	1,435
Retail Trade	3,544	67	1,709	2,238
Wholesale Trade	657	5	250	437
Local Production of goods	1,365	4	176	268
Total Direct Effects	21,955	447	9,292	12,758
Secondary Effects	13,494	156	4,661	7,861
Total Effects	35,449	603	13,953	20,619

[4] 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.

[5] The local economic impact of all $36 million in visitor spending (Table 6) is reported in Appendix C.

[6] 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.

2005 Update

The spending and impact estimates may be updated to 2005 based on reported recreation visits in 2005. Recreation visits increased by 10% in 2005 to 1.375 million. The visitor segment mix, party sizes and lengths of stay were assumed unchanged from 2004. Spending averages measured in the 2004 visitor survey were price adjusted to 2005 using Bureau of Labor Statistics price indices for each spending category. Spending averages increased by about five percent in 2005 compared to 2004.

The increase in visits along with a five percent increase in per visitor spending, increased total visitor spending to $42.5 million in 2005 (Table 9).

Table 9. Update of Spending Estimates to 2005

		Local	Day trip	Motel	Camp	Other OVN	Total
Average Spending ($ per party)							
	2004	39	54	351	200	136	162
	2005	42	58	369	213	144	171
Total Spending ($000's)							
	2004	2,248	7,439	15,593	7,785	3,109	36,174
	2005	2,666	8,892	18,132	9,186	3,637	42,513
Spending Attributed to the Park ($000's)							
	2004	209	6,526	13,910	7,304	2,733	30,682
	2005	231	7,216	15,381	8,076	3,022	33,925

The park itself employed 111 people in FY 2005 with a total payroll of $5.5 million. Including secondary effects, the local impact of the park payroll in 2005 was 163 jobs, $7 million in personal income and $8 million total value added. Including both visitor spending and park operations, the total impact of the park on the local economy in 2005 was 833 jobs and $32 million value added. Park operations account for 20% of the employment effects and a fourth of the 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.

Spending averages are derived from the 2004 Joshua Tree NP Visitor Survey. Estimates from the survey are subject to sampling errors, measurement errors and seasonal/sampling biases. Due to relatively small samples and considerable variation in spending, the overall spending average is subject to sampling errors of 11%.

Spending averages can also be sensitive to decisions about outliers and treatment of missing data. To estimate spending averages incomplete spending data had to be filled

and decisions had to be made about the handling of missing spending data and zero spending reports. Spending averages were estimated under conservative assumptions.

First, cases reporting some expenses but leaving other categories blank were filled with zeros. Twenty-seven respondents that did not complete the spending question were assumed to spend no money on the trip. Omitting cases with missing spending data instead of treating them as zeros would increase the spending average from $162 to $172. This change would increase overall spending totals and impacts by about 6% (see Appendix B, Table B1).

Outliers have a larger impact on the spending results. Twenty-two cases reporting expenses of more than $1,000 were omitted from the spending analysis. Twenty-nine cases reporting party sizes of more than seven people and six cases staying more than seven nights in the area were also omitted[7]. Spending averages including the outliers are $250 per party, 54% higher than the $162 average with outliers omitted.

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.

Multipliers are derived from an input-output model of the local economy using IMPLAN. 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. Visits are taken from NPS public use statistics.

Sorting out how much of the spending to attribute to the park when the park was not the primary motivation for the trip is somewhat subjective. The procedures assign a portion of the spending of the 15% of visitors making a trip to the area for other reasons. Eighty-five percent of all visitor spending is attributed to park visits under the stated assumptions.

[7] Reports of spending for long stays are deemed unreliable. Spending reported for large parties may not include everyone in the party. Since spending averages are applied to all visits, omitting these cases is equivalent to substituting the average spending of visitors in the corresponding visitor segment for these outliers.

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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.
Personal income	Wage and salary income, sole proprietor's income and employee payroll benefits.
Value added	Personal 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. ▪ Direct effects accrue largely to tourism-related businesses in the area ▪ Indirect effects accrue to a broader set of businesses that serve these tourism firms. ▪ Induced effects are distributed widely across a variety of local businesses.

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 478 cases with valid spending data, 20 cases reporting zero spending and 27 cases not completing the spending question. Cases with missing or no spending reported were local residents, day trips, or overnight trips without any local lodging expenses. It was assumed that these cases spent no money in the local area on the trip.

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

	Local	Day trip	Motel	Camp	Other OVN	Total
Report some spending	25	123	91	195	44	478
Missing spending data	9	11	0	0	7	27
Zero spending	7	11	0	0	2	20
Total cases	41	145	91	195	53	525
Percent zero	17%	8%	0%	0%	4%	4%
Percent missing	22%	8%	0%	0%	13%	5%

Twenty-two cases reporting spending more than $1,000 were dropped when computing spending averages. Camping fees inside the park for one case was $6,000, which should likely be $60. Several cases reported more than $1,000 in lodging costs or over $200 in local transportation. The latter may represent car rentals, or possibly some airfares. Another 35 cases with party sizes or lengths of stay greater than seven were also omitted, yielding a final sample of 468 cases for the spending analysis. The overall spending average is $250 including outliers compared to $162 without outliers.

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

	With outliers			Without outliers			
Segment	Mean	N	Std. Deviation	Mean	N	Std. Deviation	Pct Error[a]
Local	38	41	87	39	40	88	70%
Day trip	67	145	166	54	143	77	24%
Motel	543	91	622	351	78	203	13%
Camp	319	195	572	200	158	184	14%
Other OVN	160	53	234	136	49	204	42%
Total	250	525	481	162	468	191	11%

a. Pct errors computed at a 95% confidence level

Appendix C. Impacts of all Visitor Spending, 2004

Table C1 gives the impacts of $36 million in visitor spending on the local economy. All visitor spending in the region except park admissions and donations is included in this analysis. Impacts attributed to the park in Table 8 are 85% of the impacts when all visitor spending is included.

Table C-1. Impacts on Local Economy of all Visitor Spending

Sector/Spending category	Sales $000's	Jobs	Personal Income $000's	Value Added $000's
Direct Effects				
Motel, hotel cabin or B&B	8,150	131	3,555	5,772
Camping fees	183	1	26	61
Restaurants & bars	6,527	161	2,826	3,191
Admissions & fees	558	10	207	347
Local transportation	3,121	119	1,490	1,684
Retail Trade	4,814	91	2,322	3,041
Wholesale Trade	848	7	323	565
Local Production of goods	1,585	5	201	307
Total Direct Effects	**25,786**	**526**	**10,949**	**14,968**
Secondary Effects	15,897	185	5,503	9,272
Total Effects	**41,682**	**710**	**16,451**	**24,240**