

# SILOS & SMOKESTACKS NATIONAL HERITAGE AREA

## ECONOMIC IMPACT ASSESSMENT

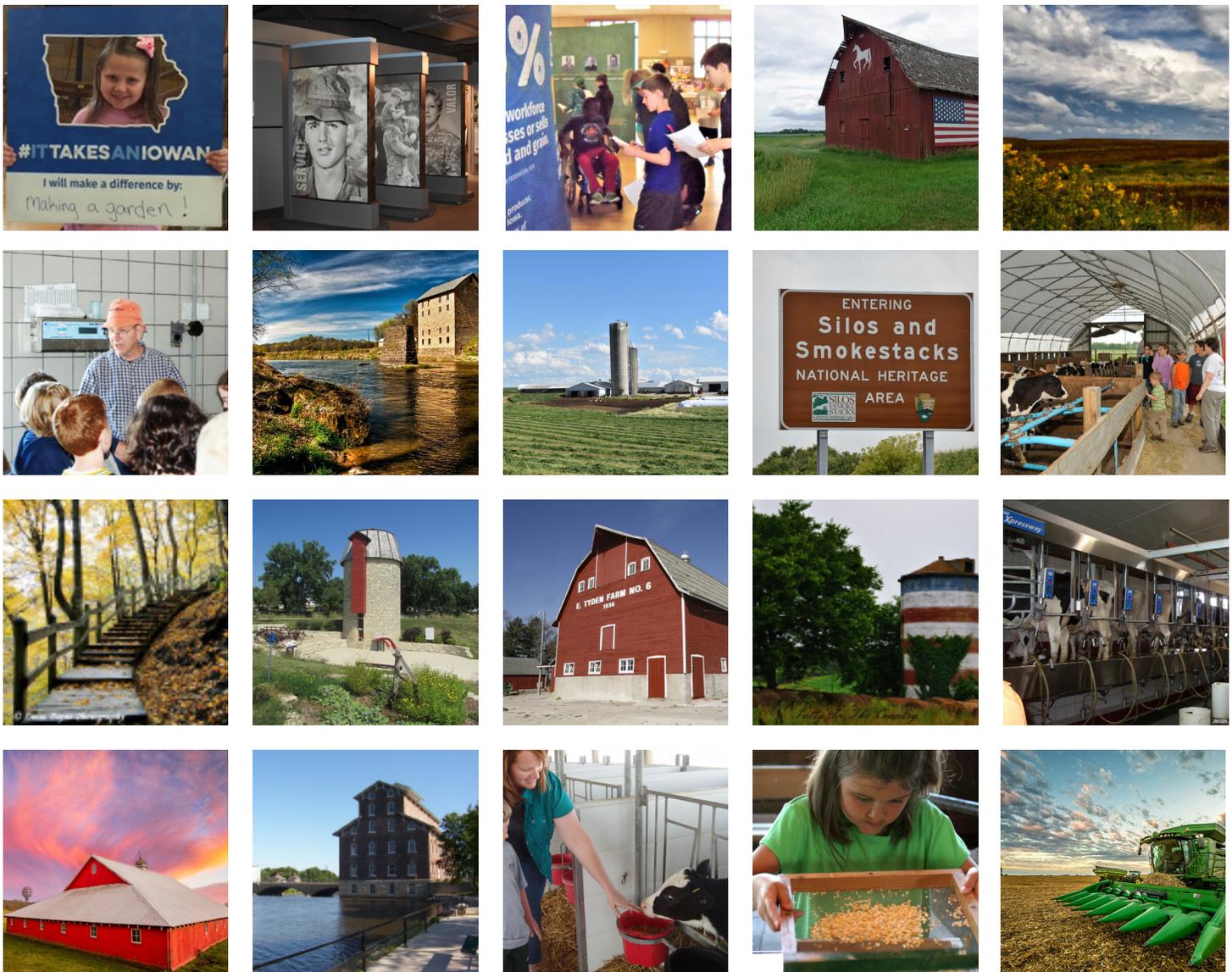
Justin Rogers  
"Sunrise Surprise"  
Cumming, IA



# INTRODUCTION

The importance of Silos & Smokestacks National Heritage Areas (SSNHA) is multifold: sites receive support and benefits, including one-on-one assistance, communities feel the economic boost from visitation, and the mission of expanding agricultural heritage education is improved. As the landscape of America's farmland continues to change, it is important to preserve and share these stories. SSNHA partners with farms, museums, and historic sites, providing workshops, seminars, and grant assistance that help them thrive and improve their presence in the community.

Silos & Smokestacks not only provides educational opportunities, it allows visitors to experience agriculture, past and present, in a variety of ways. SSNHA is a 37-county region in Northeast Iowa, covering over 20,000 square miles. Silos & Smokestacks is an affiliated area of the National Park Service, serving as the connecting element of the regional partnership network of over 115 partner sites.



In June 2017, Chipley Consulting was hired by Silos & Smokestacks National Heritage Area to measure the economic, employment, and government revenue impacts of tourism of the heritage area. The goals of the economic impact study are:

- To quantify economic and employment impacts of the heritage area and its sites through the lens of tourism and
- To highlight benefits SSNHA provides to local heritage sites.

This report highlights the economic benefits of SSNHA to the local communities and the larger region. The map below displays the counties in the heritage area, which also includes those in the study area.



The study is both qualitative and quantitative in nature. Chipley Consulting conducted interviews with several heritage sites, highlighted as case studies in the final report. The case studies show the importance of SSNHA to the success of the individual sites. In addition, visitor surveys were developed and deployed to gather spending information for both day trip and overnight visitors to sites in the heritage area. The quantitative data collected from this survey, along with data about the total number of visitors from SSNHA were used in the economic impact analysis with the use of modeling software called IMPLAN. IMPLAN is the industry-standard platform for estimating economic impacts and is widely used by governments, universities and professional economic analysts.

Key economic findings presented in this summary include the total economic impact for 2017, including the economic, employment, and state and local government revenue of the entire Silos & Smokestacks National Heritage Area.

## FINDINGS HIGHLIGHTS



**3.1 M**

The estimated total number of visitors to SSNHA per year



**\$309.4 M**

The estimated increase in economic activity due to SSNHA per year



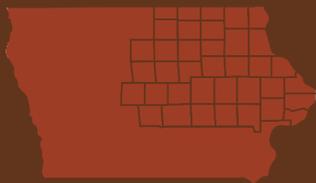
**7,089**

The number of jobs SSNHA and partner sites support in the region



**\$81.2 M**

Economic activity generated by SSNHA increases annual tax revenues



**\$39.5 M**

State and local tax revenues



**\$41.8 M**

Federal tax revenues

M = Million

The effects of visitation bring the largest economic benefit to the heritage area. Silos & Smokestacks National Heritage Area plays a substantial role in promoting and encouraging tourism within the heritage area. The total number of visitors to the heritage area are calculated by the local sites and shared with SSNHA annually.

Visitors spend money in the heritage area, which in turn creates a positive effect on the overall economy. More than \$309 million in annual economic benefit is supported within the heritage area through tourism.

In 2016, there were a total of 3.1 million visitors to the heritage area.



Capture the Heart of  
**AMERICA**  
PHOTO CONTEST  
[silosandsmokestacks.org](http://silosandsmokestacks.org)

A short survey was developed asking questions about key data points including primary residence, whether surveyors were staying overnight, daily spending amounts, and party size (See Appendix 3). The survey was deployed late in the summer of 2017 and ran through July 15, 2018. A total of 534 surveys were completed.

For purposes of this project, three types of visitors were identified:

1. Overnight: those who are visiting from outside the region and staying overnight,
2. Local day: those who live less than 30 miles from the site they are visiting
3. Non-local day: visitors who live greater than 30 miles from the site they are visiting.

Below is a breakdown of visitor types based on the survey responses, along with percent total visitation and average daily spending:

**TABLE 1: VISITOR TYPE AND AVERAGE SPENDING**

VISITOR TYPE	% OF TOTAL VISITATION	ANNUAL VISITORS*	AVERAGE DAILY SPENDING**	TOTAL SPENDING (PER YEAR)
Local Day (less than 30 miles)	25%	782,265	\$44.12	\$32,906,999.21
Non-Local Day (greater than 30 miles)	38%	1,189,042	\$61.30	\$69,309,737.94
Overnight	37%	1,157,751	\$178.29	\$333,459,627.64

\*Total number of visitors is based on the breakdown by survey respondents and the total number of visitors to SSNHA in 2016

\*\*Average daily spending is based on quantitative survey data results

In the Overnight spending category, the average survey respondent stayed a total of 2.35 nights. With an average of \$178.29 spent per day, the total amount spent per visitor for their duration was an estimated \$362.67. A total of \$333,459,627.64 is spent by overnight guests who are visiting a site in the heritage area. This is considered to be the initial spending that creates additional economic impact. People visited from places in-state, as well as, from states like Colorado, Florida, Texas, Arizona, Maryland and Virginia.

The average overnight survey respondent stayed a total of 2.35 nights.

To identify the economic impacts of visitor spending, average spending information by category from each of the visitor types along with total visitors for the year 2016 was utilized in the modeling process. The IMPLAN economic modeling software was used to estimate spending flows through each geographic region. The model, based on the national input-output spending relationships between industries, households and governments, was customized to match the existing local economies.

Visitors spend money in the region, creating a positive ripple effect on the lowa economy. Based on the total number of visitors to the SSNHA and partner sites and data collected during this process, the total value added, or economic impact, of visitation and tourism for SSNHA is estimated at \$309.4 million annually.



**TABLE 2: ECONOMIC IMPACT OF TOURISM AND VISITATION BY VISITOR SEGMENT**

VISITOR SEGMENT	DIRECT EFFECT	INDIRECT EFFECT	INDUCED EFFECT	TOTAL EFFECT/ VALUE ADDED
Local Day	\$10,812,403	\$4,456,049	\$4,589,158	\$19,857,609
Non-Local Day	\$22,918,351	\$9,526,904	\$9,769,706	\$42,214,962
Overnight	\$146,317,032	\$47,015,015	\$53,985,130	\$247,317,178
Total	\$180,047,785.62	\$60,997,968.75	\$68,343,994.53	\$309,389,749

The economic spending analysis demonstrates that within the region, visitors traveling from outside the region and spending the night represent the largest economic impact to the regional economy. Although overnight visitors only represent 37% of the total visitation, they account for 80% of the economic benefit of Silos & Smokestacks National Heritage Area. This is largely due to the increased amount of new spending from outside the area on lodging, restaurants, transportation, shopping, etc.

Economic impact modeling also estimates the potential losses in economic activity to the region without a heritage area. If SSNHA and partner sites were not in operation any more, it is assumed that local residents would spend money on other local activities (this includes the “Local Day” visitor segment). Visitors from outside the region (Non-local Day and Overnight visitors) may not have made the trip to the region at all. Based on visitors surveyed at the heritage area sites, up to 75% of the economic impact could be lost to the area in the absence of the partner sites.

**Up to 75% of the economic impacts could be lost to the area in the absence of SSNHA partner sites.**

# TOTAL EMPLOYMENT IMPACT

Silos & Smokestacks National Heritage Area supports a substantial number of jobs in the area. The total employment impact is 7,089 jobs (5,488 direct jobs and 1,602 indirect/induced jobs). Direct employment numbers are based on spending from visitors which are then used to pay wages within industries like retail, food services and overnight accommodations. Indirect and induced jobs are supported by local businesses spending part of their increased income on goods and services they need in order to serve customers. This is the trickle-down effect of economic activity attributed to SSNHA. The multiplier for SSNHA employment is 1.3. For every job directly supported by SSNHA and partner sites, another .3 job is supported through additional spending.

**TABLE 3: OVERALL EMPLOYMENT IMPACT FOR ALL VISITOR TYPES**

	DIRECT EFFECT	INDIRECT EFFECT	INDUCED EFFECT	TOTAL EFFECT
Tourism	5,488 jobs	694 jobs	908 jobs	7,089 jobs

The graphic below shows the sectors with the highest number of jobs supported by SSNHA. These industries are inclusive of direct, indirect, and induced employment impacts. Retail stores, restaurants, and hotel/motel industries have the greatest number of jobs.

**GRAPHIC 2: TOP EMPLOYMENT IMPACT SECTORS**

Industries and the total number of jobs supported.



Silos & Smokestacks National Heritage Area supports the federal government through increased tax revenue estimated at \$41.7 million.

**TABLE 4: FEDERAL GOVERNMENT TAX REVENUE**

DESCRIPTION	EMPLOYEE COMPENSATION	PROPRIETOR INCOME	TAX ON PRODUCTION AND IMPORTS	HOUSEHOLDS	CORPORATIONS
Social Ins Tax - Employee Contribution	\$10,391,278	\$1,170,077			
Social Ins Tax - Employer Contribution	\$9,991,258				
Tax on Production and Imports: Excise Taxes			\$2,673,135		
Tax on Production and Imports: Custom Duty			\$1,008,552		
Tax on Production and Imports: Fed NonTaxes			\$127,197		
Corporate Profits Tax					\$4,985,152
Personal Tax: Income Tax				\$11,441,308	\$4,985,152
<b>Total</b>	<b>\$20,382,536</b>	<b>\$1,170,077</b>	<b>\$3,808,884</b>	<b>\$11,441,308</b>	
<b>Overall Impact</b>	<b>\$41,787,957</b>				



# GOVERNMENT REVENUE IMPACT

The Silos & Smokestacks National Heritage Area also supports state and local governments through increased tax revenue. Due to the heritage area's attraction of visitors, SSNHA generates approximately \$39.5 million in tax revenue annually.

**TABLE 5: STATE AND LOCAL TAX REVENUE**

DESCRIPTION	EMPLOYEE COMPENSATION	TAX ON PRODUCTION AND IMPORTS	HOUSEHOLDS	CORPORATIONS
Dividends				\$47,438
Social Ins Tax - Employee Contribution	\$4,324			
Social Ins Tax - Employer Contribution	\$9,058			
Tax on Production and Imports: Sales Tax		\$16,141,022		
Tax on Production and Imports: Property Tax		\$15,611,613		
Tax on Production and Imports: Motor Vehicle License		\$723,923		
Tax on Production and Imports: Other Taxes		\$1,188,612		
Tax on Production and Imports: S/L Non-Taxes		\$54,206		
Corporate Profits Tax				\$478,960
Personal Tax: Income Tax			\$3,835,022	
Personal Tax: Non-Tax			\$707,813	
Personal Tax: Motor Vehicle License			\$426,549	
Personal Tax: Property Taxes			\$90,305	
Personal Tax: Other Tax (Fish/Hunt)			\$156,005	
Total	\$13,382	\$33,719,376	\$5,215,694	\$526,398
<b>Overall Impact</b>		<b>\$39,474,850</b>		

# DYSART HISTORICAL CENTER

## A Case Study

Interviewees: Catharine Wieck, Susan Fuchs and Ann Annis  
Board Members of the Dysart  
Historical Society



**HAVE YOU EVER RECEIVED ANY GRANTS FROM SSNHA? HOW HAS IT MADE A DIFFERENCE FOR YOU? WHEN WAS IT THAT YOU RECEIVED THE GRANTS?**

We received a grant from SSNHA to complete a historical timeline that is located on a wall inside agricultural museum. The timeline chronicles the history of Dysart. The project was overwhelming at the beginning, but SSNHA helped us with getting started on it and organizing the display in a meaningful way. We wouldn't have made it happen otherwise.

1997

Year Site  
Began  
Operation

2012

Year  
Designated  
within SSNHA

**WHAT CAN VISITORS LEARN AND DO WHILE THEY ARE HERE?**

We have different educational opportunities. For example, visitors can go into the museum building to see historical artifacts from the town or they can see what it was like to attend a country school. We have recently spent a lot of time teaching children about the Orphan Train. In addition, we teach children about the importance of pollination, called the Pollinators Program.



# DYSART HISTORICAL CENTER



28

Volunteers

SSNHA met us where we were, and raised the bar for us to make our organization better.

**WHAT BENEFITS DO YOU BRING TO THE LOCAL COMMUNITY? THE LARGER REGION?**

Volunteers at Dysart Center play a huge role in conserving heritage. We made the "It Takes an Iowan" exhibit a community event. It brought the whole town together, which had a larger impact on the community. The Center has made an economic impact as well. For example, we have worked with the local development corporation. We have also had bus tours come to town, as well as, stop at the Dysart museum and spend money locally at other shops in town.

**DESCRIBE THE IMPORTANCE OF BEING A PART OF SILOS & SMOKESTACKS NATIONAL HERITAGE AREA IN YOUR OWN WORDS.**

For us, it's a feather in our cap. Being a part of the National Heritage Area means we are part of something bigger, it offers excellent resources for the Center, and it helps to create a positive image. People respond positively when they see the SSNHA medallion.

**HAVE YOU PARTICIPATED IN ANY WORKSHOPS OR SEMINARS HOSTED BY SSNHA?**

Yes, we have taken advantage of every one we could. Since we became a member, we have attended all of the annual awards. We are getting ready to do the reenactment of the Country School, with an emphasis on the historical overview of the Orphan Train. SSNHA staff helped us to get started with the Country School curriculum.

**HOW DO YOU SUPPORT ECONOMIC DEVELOPMENT?**

The Center is a draw for bus tours. Visitors end up staying in town to eat lunch and do some shopping.



**WHY IS IT IMPORTANT THAT THEY CONTINUE TO PROVIDE SERVICES TO YOU AND TO THE PEOPLE OF THE AREA?**

SSNHA met us where we were, and raised the bar for us to make our organization better. SSNHA provides services for us, promote tourism to our site and the larger area, and provide us with information we need to succeed. SSNHA has helped us to have a direction and stay focused on our agricultural areas. It's easy to go off on several tangents, and not focus on our mission.

400\*

Number of Visitors Each Year

\*Had 800 visitors in 2016 because of the It Takes an Iowan exhibit

# GROUT MUSEUM DISTRICT

A Case Study

Interviewee: Billie Bailey

Executive Director of the Grout Museum District



## 1956\*

Year Site Began Operation

\*Established in 1932 when Henry Grout passed away. Building opened in 1956. Prior to this, the collection was located at the Waterloo YMCA

### WHEN DID YOU BECOME A PARTNER SITE WITHIN SSNHA?

We became a partner site in 2001. Our museum was involved at the beginning with the establishment of the National Heritage Area.

HAVE YOU EVER RECEIVED ANY GRANTS FROM SSNHA? HOW HAS IT MADE A DIFFERENCE FOR YOU? TELL US MORE ABOUT THIS? WHEN WAS IT THAT YOU RECEIVED THE GRANTS? DID IT PUT YOU OVER THE EDGE TO GET SITE GOING?

We have received many grants from SSNHA. One program that was a result of a SSNHA grant is Voices of Iowa: Sharing the Farm Story was developed with SSNHA. It is an oral history program where we interview farmers and their families about personal memories and knowledge of these individuals. The objective is to preserve the farm story during a time where we are seeing technological, economic and social change. There are over 300 farm life interviews stored in a digital format from 70 counties in the Voices of Iowa program.



## 2001

Year Designated within SSNHA

## 17

Staff Employed

## 774

Volunteers

# GROUT MUSEUM DISTRICT

## WHAT CAN VISITORS LEARN AND DO WHILE THEY ARE HERE?

There are multiple experiences visitors can learn from while they are visiting. "The Engine of the Heartland" explores the evolution of Waterloo from a small county seat town into a Midwest industrial center. Machines of transportation and power are featured along with agri-production, food processing, and farm implement manufacturing. Recently added "Voices of Iowa: Farm Stories" interactive kiosk.

Visitors have the option of visiting one or all of 5 locations: Sullivan Brothers Iowa Veterans Museum, Grout Museum of History and Science, Carl A. & Peggy J. Bluedorn Science Imaginarium, Rensselaer Russell House Museum and the Snowden House.



People from all fifty states visited last year.

# 91,373\*\*

Number of Visitors Each Year

\*\*Total includes outreach programs at other locations

## HAVE YOU PARTICIPATED IN ANY WORKSHOPS OR SEMINARS HOSTED BY SSNHA?

We have participated in countless programs and have also had some of their staff as teachers and trainers in seminars. SSNHA is a professional organization.

## DESCRIBE THE IMPORTANCE OF BEING A PART OF SILOS & SMOKESTACKS NATIONAL HERITAGE AREA.

SSNHA has allowed us to connect to people who have helped us to elevate the status of our museum. Grants that have been awarded to us are helpful as well, but most important are the connections we make.



## WHY IS IT IMPORTANT THAT THEY CONTINUE TO PROVIDE SERVICES TO YOU AND TO THE PEOPLE OF THE AREA?

SSNHA provides important services, but they also promote tourism to the larger area. As Iowa has grown and evolved over the past 20 years, the change in the landscape has been dramatic: historical farms, heritage, and culture is going away. As much as it would be nice to preserve them, we can't afford to keep them all. We can do our best to document the story, though.

## WHAT BENEFITS DO YOU BRING TO THE LOCAL COMMUNITY? THE LARGER REGION?

We help to preserve cultural heritage. We are also a major local tourist draw, and work closely with the Waterloo Convention & Visitors Bureau to continue to bring visitors to our area.

# HANSEN'S DAIRY

## A Case Study

Interviewee: Jordan Hansen

Bookkeeping, Tours, and Graphic Design for Hansen's Dairy



# 1864

Year Site  
Began  
Operation

## HOW LONG HAS YOUR SITE BEEN IN OPERATION?

We have been in operation since 1864. The farm is designated as a Heritage Farm within the state of Iowa. We began specializing in dairy in the 1950s and in the early 2000's, we decided to build our own creamery and started selling to customers and offering farm tours.

## HAVE YOU EVER RECEIVED ANY GRANTS FROM SSNHA?

Yes, we have benefited from SSNHA grants. A useful one has been the bus grants, where SSNHA provides grants for school field trips. As a result, we have had a lot of students visit that otherwise would not have been able to.



# 2006

Year  
Designated  
within SSNHA

# 37\*

Staff  
Employed

\*Includes employees at the farm and two retail shops

## WHAT CAN VISITORS LEARN AND DO WHILE THEY ARE HERE?

We have two types of tours: walk-through and hands-on. Through these, we tell the story of how milk gets from the cows to the table. In the hands-on tour we teach folks to milk a cow, feed a calf, and make butter. Visitors can also pet animals like kangaroos and goats. We get a lot of different folks for this tour, including school groups, day cares, 4-H groups, and bus tours. We also get a lot of families who both live locally and come from further away. In addition, we are Harvest Hosts, which is where visitors can park their RV onsite for free. This is great because they also tour the farm and purchase products while they are here.

Silos teaches farmers to tell the story of what each site does and helps to draw out why they are important.



## HAVE YOU PARTICIPATED IN ANY WORKSHOPS OR SEMINARS HOSTED BY SSNHA?

Yes, we have participated in a lot of beneficial programs by SSNHA. Some events provided a lot of networking opportunities where we got to know other Silos sites. It has been helpful to cross-promote different events, and they have educated us on the Iowa Core standards for education, which allows us to host field trips.

They provide us with numerous educational, networking, and support services, and promote tourism for our farm.

# 5,500

Number of Visitors Each Year

## DESCRIBE THE IMPORTANCE OF BEING A PART OF SILOS & SMOKESTACKS NATIONAL HERITAGE AREA IN YOUR OWN WORDS.

We have absolute confidence in the people who are working there, the goals they have, and the mission they work toward. They provide us with numerous educational, networking, and support services, and promote tourism for our farm. They are a huge asset because there aren't any other professional organizations that provide these services.



## WHAT BENEFITS DO YOU BRING TO THE LOCAL COMMUNITY? THE LARGER REGION?

We support local jobs both directly and indirectly and keep money in the local community. We have the farm where we host tours, along with two retail locations to sell our dairy products. Our products are also sold at a number of other vendors. We also educate a lot of students and provide an alternative option for local, healthy, and reasonably priced food.

# IOWA'S DAIRY CENTER

A Case Study

Interviewee: Mariah Schmitt

Dairy Center Coordinator at the Northeast Iowa

Dairy Foundation



## 2000

Year Site  
Began  
Operation

### HAVE YOU PARTICIPATED IN ANY WORKSHOPS OR SEMINARS HOSTED BY SSNHA?

Yes, we have attended grant writing workshops and have participated as a panel member/participant in a number of seminars.

### HAVE YOU EVER RECEIVED ANY GRANTS FROM SSNHA? WHAT ARE THEY?

Yes, we have received multiple grants from SSNHA! We have received signage funding that helps us to tell the story of dairy farming. We have also received funding to install cameras throughout the facility including the milking parlor and maternity area, so visitors can watch the process as it occurs. They also provided funding to support the Nutrition Room and Hall of Breeds Area.



## 2005

Year Designated  
within SSNHA

## 5

Staff  
Employed

## 50

Volunteers

## WHAT CAN VISITORS LEARN AND DO WHILE THEY ARE HERE?

We serve three types of groups: community college students who are learning to become farmers, visiting youth, and providing support for dairy producer members.

The Dairy Center is an educational facility and an operating dairy farm with 280 cows. The Center has two robotic milking units that visitors can view at any time and see how an operational farm really works.

There is a Dairy Museum at the Center that features historical tools of dairy farmers and provides visitors a lesson in the dairy industry. There is also a Nutrition Room where the health benefits of dairy are graphically displayed and community college and field trip classes are held.

## WHY IS IT IMPORTANT THAT THEY CONTINUE TO PROVIDE SERVICES TO YOU AND TO THE PEOPLE OF THE AREA?

SSNHA provides services but also promote tourism to the larger area. Every organization working to support farmers and agriculture benefit from SSNHA. Farmers also benefit from our organization and SSNHA indirectly.

Farmers don't have the time to do marketing. They are working 16 hours a day. They need help communicating their story. The Northeast Iowa Dairy Center is able to complete this mission with the support of SSNHA. We aim to be a voice for people who cannot speak for themselves.

Our Center would absolutely not be as far along as we are without SSNHA. The Dairy Center is trying to serve so many people and we rely on the support of National Heritage Area.

Farmers don't have the time to do marketing. They are working 16 hours a day. They need help communicating their story. The Northeast Iowa Dairy Center is able to complete this mission with the support of SSNHA.



## DESCRIBE THE IMPORTANCE OF BEING A PART OF SILOS & SMOKESTACKS NATIONAL HERITAGE AREA IN YOUR OWN WORDS.

We benefit greatly from being part of SSNHA. It is an extremely reputable organization and they are very important for our marketing. Staff at SSNHA help the Center continually build our network. Visitors come to the Center because they hear about it through SSNHA. Visitors know SSNHA is a great organization and recognize the SSNHA logo when they visit. Staff at SSNHA help the Center continually build our network.

We also participate in the Passport to your National Parks Program through SSNHA, where visitors can purchase their NPS Passport and record visits to NPS Sites. When visitors come to our site, we stamp their NPS passport with a rubber stamp. This helps us to increase visits.



Silos helps the Center continually build our network.

8,500\*

Number of Visitors Each Year

\* Does not include those who visited but didn't take a tour

## WHAT BENEFITS DO YOU BRING TO THE LOCAL COMMUNITY? THE LARGER REGION?

We are very important to the fabric of Northeast Iowa. Our region still has 1 in 10 jobs directly supported by agriculture and we provide important education services and invaluable support to local farmers. The Dairy Center operations also have an economic impact: each of the 280 cows brings in over \$23k in revenue. The Center draws in over 10,000 visitors each year.

# WAPSIPINICON MILL MUSEUM

## A Case Study

Interviewee: Leanne Harrison

Buchanan County Historical Society, Wapsipinicon Mill Museum



# 1976

Year Site  
Began  
Operation

## HOW LONG HAS YOUR SITE BEEN IN OPERATION?

The Wapsipinicon Mill was one of Iowa's largest grist mills. It was gifted to the Buchanan County Historical Society in 1976. The structure was built between 1867-1870 and was entered in the National Register of Historic Places in 1975.

# 2002

Year  
Designated  
within SSNHA

## HAVE YOU EVER RECEIVED ANY GRANTS FROM SSNHA?

We have had several different grants that have helped immensely. Staff at SSNHA showed us how to secure grants to restore the mill. They also helped to pay for interpretation of the mill and for brochures. In addition, there is a children's mill that was paid for by an SSNHA grant.

# 65

Volunteers



# WAPSIPINICON MILL MUSEUM

## WHAT CAN VISITORS LEARN AND DO WHILE THEY ARE HERE?

The mission of the mill museum is to tell and preserve the story in agriculture. There are lots of hands on things to do: visitors can shell corn and grind corn, as well as learn about the history of the mill tools used in the daily operations.



**5,000**

Number of Visitors  
Each Year

We would be lost without SSNHA.

The heritage area has a large network that we don't have access without them. They are instrumental in boosting our visitor numbers.

## DESCRIBE THE IMPORTANCE OF BEING A PART OF SILOS & SMOKESTACKS NATIONAL HERITAGE AREA IN YOUR OWN WORDS.

SSNHA helps to draw tourists to our museum. Often, people visit because they saw the Mill on the SSNHA website. We have received a lot of valuable information on best practices around running a successful heritage site-things we should and shouldn't do.

We would be lost without SSNHA. The heritage area has a large network that we don't have access without them. They are instrumental in boosting our visitor numbers. SSNHA has helped us to make the museum an interesting place to visit.



## HAVE YOU PARTICIPATED IN ANY WORKSHOPS OR SEMINARS HOSTED BY SSNHA?

Yes, we have been both participants and have also hosted one. In workshops, we have gotten help with designing new brochures. SSNHA also provided resources that helped us understand and learn about the Social Studies Core Standards so students can visit during the school day.



## CONCLUSION

Silos & Smokestacks National Heritage Area is an invaluable economic contributor to northeastern Iowa. The partnerships SSNHA builds and fosters, along with the efforts to increase visitor rates at partner sites, create economic development. SSNHA is a vital driver in the rural economy of the region, contributing \$309.4 million annually and supporting a total of 7,089 jobs. Federal tax revenue is estimated at \$41.8 million, and state and local tax revenue is estimated at \$39.5 million per year.



# APPENDIX 1: ECONOMIC IMPACT ANALYSIS PROCESS

Chipleigh Consulting developed a short survey form that highlighted important data points that would ultimately be used as inputs into the IMPLAN model. Spending questions by category, total number in party, place of residence, and whether it was a day trip. Based on the answers, Chipleigh categorized visitors into three types:

**TABLE 6: VISITOR TYPES**

VISITOR TYPE	% OF TOTAL VISITATION	ANNUAL VISITORS
Local Day (live less than 30 miles from the site they are visiting)	25%	782,265
Non-Local Day (live more than 30 miles from the site they are visiting)	38%	1,189,042
Overnight	37%	1,157,751

Chipleigh then averaged spending patterns for each of the three visitor types to run separately in the model. For overnight guests, the total amount of spending per day was multiplied by the average number of nights guests were in the area, which was 2.35. The total amount of spending per trip was used in the model.

The categories that were used in the modeling process is displayed in the table below. The categories in the table below from the survey were averaged for each of the three visitor types. Total spending for each category was then added as an input to the IMPLAN model.

**TABLE 7: IMPLAN CATEGORIES**

CATEGORY IN SURVEY	IMPLAN DESCRIPTION	IMPLAN CODE(S)
Restaurants	<ul style="list-style-type: none"> <li>• Restaurant</li> <li>• Family Restaurant</li> <li>• Bars (ie. drinking places), alcoholic beverages, taverns, mobile food stands</li> </ul>	<ul style="list-style-type: none"> <li>• 501</li> <li>• 502</li> <li>• 503</li> </ul>
Groceries	Grocery stores/snacks	400
Transportation	<ul style="list-style-type: none"> <li>• Gasoline stations</li> <li>• Rural buses, cabs, school buses, etc.</li> <li>• Car repair</li> </ul>	<ul style="list-style-type: none"> <li>• 402</li> <li>• 412</li> <li>• 504</li> </ul>
Museum tour fees	Community/historical museums	493
Shopping	Souvenir shops, clothing shops, gift shops	406
Lodging (overnight only)	<ul style="list-style-type: none"> <li>• Hotels</li> <li>• Bed and Breakfast Inns</li> </ul>	<ul style="list-style-type: none"> <li>• 499</li> <li>• 500</li> </ul>

SSNHA provided the total number of visitors for the year 2016. Chipleigh used the same proportion of the three visitor types in the survey and applied it to the total number of visitors for the year. The total number of visitors by category were then incorporated into the model.

Economic impact modeling estimates the potential losses in economic activity to the region without a heritage site. If the heritage and partner sites were not in operation any more, it is assumed that local residents would spend money on other local activities (the Local Day, less than 30 miles category). Visitors from outside the region (Non-Local Day-greater than 30 miles category) may not have made the trip to the region. Based on visitors surveyed at the heritage sites, up to 75% of the associated economic impacts would be lost to the area in the absence of the attractions.

Up to 75% of the economic impacts could be lost to the area in the absence of the partner sites.

<b>TOTAL IMPACT</b>	Direct impact + Indirect Impact + Induced Impact
<b>DIRECT IMPACT</b>	Initial impact (initial round of spending by visitors)
<b>INDIRECT IMPACT</b>	Backward supplier impacts (what has to be purchased to supply the direct impact)
<b>INDUCED IMPACT</b>	Additional household spending from the jobs supported by the direct and indirect supplier impacts.
<b>MULTIPLIER</b>	Total production requirements within the Study Area for every unit of production sold to Final Demand. Multipliers were constructed in IMPLAN.
<b>VALUE ADDED</b>	The increase in additional economic activity caused by the impact. Technically, value added is the value of output less the value of intermediate consumption. It is essentially the economic impact

# APPENDIX 3: SURVEY



We are conducting a survey to help determine the economic impact of Silos & Smokestacks National Heritage Area. This will take just a few minutes and your individual answers will be confidential. You will have the opportunity to win a prize if you complete the survey.

1. Have you heard of Silos & Smokestacks National Heritage Area before? \_\_\_\_\_
2. Which Silos & Smokestacks National Heritage site are you visiting today?  
\_\_\_\_\_
3. Where do you live? \_\_\_\_\_ County, \_\_\_\_\_ State
4. How many **nights** are you spending on your trip to Silos & Smokestacks National Heritage Area? \_\_\_\_\_
5. How many **individuals** are in your group (including yourself)? \_\_\_\_\_
6. Approximately how much money are you spending **per day** while on your trip in the following categories? (answer for your **entire party**)

Description	Amount spent per day
Lodging (bed and breakfasts, inns, etc.)	\$ _____
Restaurants/brewery/bar	\$ _____
Grocery stores/snacks	\$ _____
Tour fees or museum entrance fees	\$ _____
Transportation (service stations, gasoline, taxi-cabs, etc.)	\$ _____
Shopping: art dealers, souvenir shops, gift shops	\$ _____

Thank you so much for your time. If you'd like to be added to the drawing to win a \$100 prize, please share your name and email address or phone number below:

Name: \_\_\_\_\_ Phone/Email: \_\_\_\_\_



Justin Rogers  
Cumming, IA

